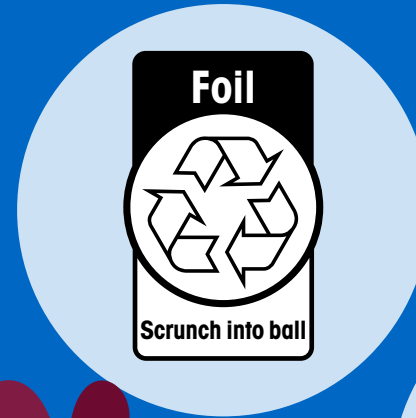


VERSION 1: SEPTEMBER 2023



AUSTRALASIAN RECYCLING LABEL

CONSUMER INSIGHTS REPORT 2023



THIS PROJECT RECEIVED GRANT FUNDING FROM THE AUSTRALIAN GOVERNMENT.
DEVELOPED BY THE AUSTRALIAN PACKAGING COVENANT ORGANISATION





Chris Foley
CEO, APCO
APCO

FOREWORD

The sustainability of the packaging system – what our packaging is made of and whether it goes on to a new life or ends up in landfill – remains a pressing concern for Australians and New Zealanders. This year, the closure of Australia’s much-loved REDcycle soft plastics stewardship program presented a challenge to community confidence in Australia’s recycling system. While many predicted a significant decline in consumer engagement, this has not been the case. Positively, consumers are as engaged with recycling as ever – though there is still much work to be done.

This year’s findings confirm the importance consumers place on accurate, prominent on-pack recycling information, along with the growth of the Australasian Recycling Label (ARL) Program itself. Recycling is still seen as the most impactful everyday behaviour consumers can do to help the environment, awareness of the label continues to grow, and three quarters of consumers are asking to see the ARL on all packaging. For the first time, we’ve also cast our net wider to assess and compare

New Zealand’s attitudes to packaging sustainability – with positive results.

As we look to accelerate the rollout of the ARL following a number of initiatives to strengthen the Program’s governance and integrity, the insights in this report provide an invaluable tool to understand the thoughts and feelings of consumers. This will allow us to best help all Australians and New Zealanders make the right decision at the bin - and play their role in developing a circular economy for packaging.





Rebecca Gilling
co-CEO, Planet Ark



FOREWORD

Amidst challenges faced by our domestic recycling industry in recent years, Australians maintain recycling as a vital part of their sustainable commitment. Recycling is seen as one of the most important actions individuals can take on a daily basis to live a sustainable life, but that does not mean it is always simple. Ongoing education and information provision is key to empowering individuals to make the right choices at the bin, and was a key driver in the development of the Australasian Recycling Label (ARL) Program.

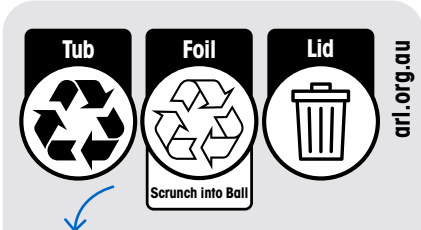
Today, the ARL has emerged as an important tool guiding both businesses and consumers towards informed choices. As an evidence-based system, the label fills a critical need by providing clear recycling information precisely when consumers need it most, thereby reducing confusion and helping consumers become better recyclers. While basic materials are often correctly recycled or disposed of, the ARL consistently enhances recycling rates for almost all packaging products. The label has also proven influential in encouraging packaging designers to improve recyclability by simulating

the behaviour of packaging in the Australian recycling ecosystems.

Everyone from industry, government and consumers is vital to creating cleaner waste streams in Australia, and understanding attitudes and beliefs is crucial to improving recycling rates. As we strive for a circular economy for packaging this report serves as a compass, underscoring the vital link between informed consumers and packaging sustainability and reinforcing that Australians are both willing and able to play their part.



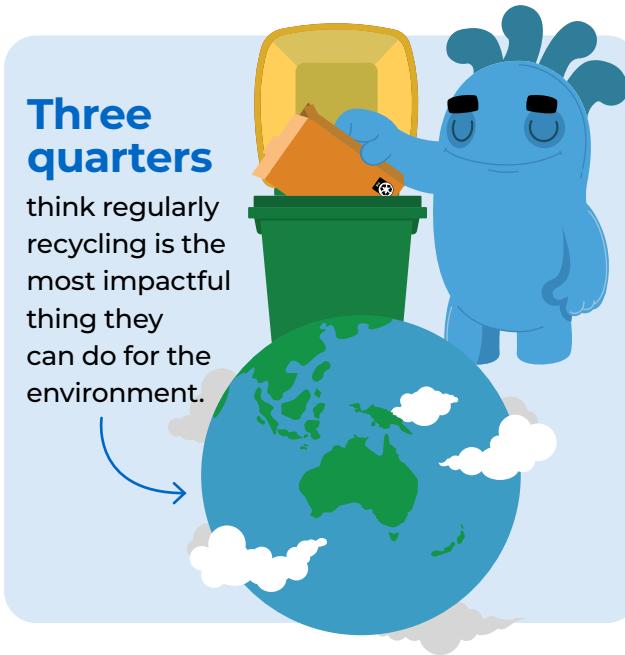
REPORT HIGHLIGHTS



Since its inception, the **ARL Program has been demonstrated to have positively influenced the packaging design choices of brand owners** and promoted circular economy initiatives in Australia and New Zealand.



The ARL plays a significant role in **positively impacting consumer behaviour both at the bin and at the checkout.**



Three quarters

think regularly recycling is the most impactful thing they can do for the environment.



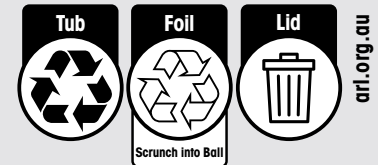
50%

find knowing what can and can't be recycled confusing.



A majority want **more information about how to recycle**

Awareness of the ARL is steadily growing.



The majority think the ARL is a great idea and want to see it on all packaging!



increased from

47%

2018



increased from

44%

2018

76%

2023

71%

2023

CONTENTS

This report draws on the Australasian Recycling Label's annual consumer benchmarking research. The research findings revealed the following 4 key consumer insights:



This is an interactive document. The top toolbar and contents buttons allow you to navigate through the different sections of the guide.



AUSTRALIA



NEW ZEALAND

Australian



Results



Insight 1. Australians know recycling matters.



Australians value recycling and consider it an important part of living a sustainable life. Three quarters (74%) think recycling regularly is the most impactful thing they can do for the environment.

Over a quarter (27%) of Australians also want access to a greater range of bins/disposal services (e.g., green waste, separate paper bins).

Recycling is considered **more impactful** than (%):





Insight 2. Recycling is convenient – but confusing!

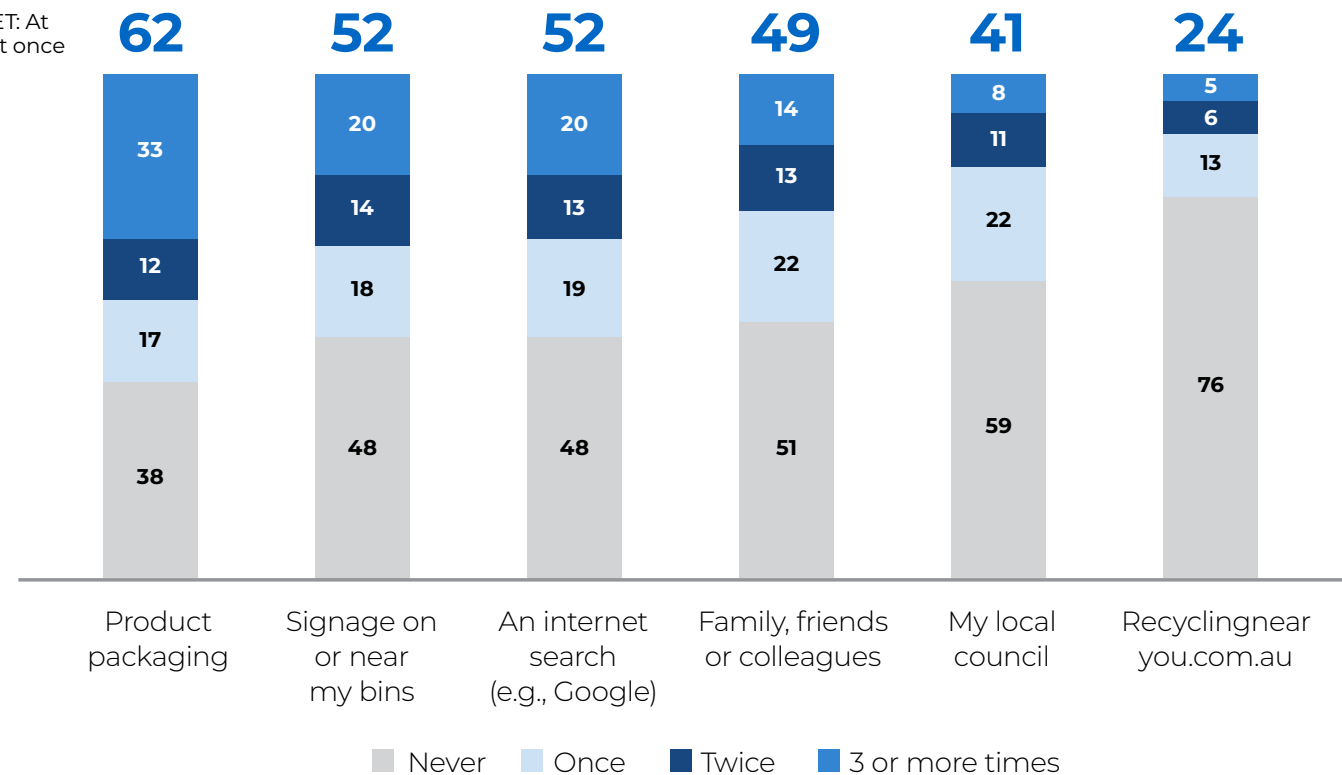


Product packaging is the most common source of recycling information, followed by bin signage and the internet.

Prominent on-pack labelling continues to present the best channel for businesses to help their customers recycle packaging correctly.

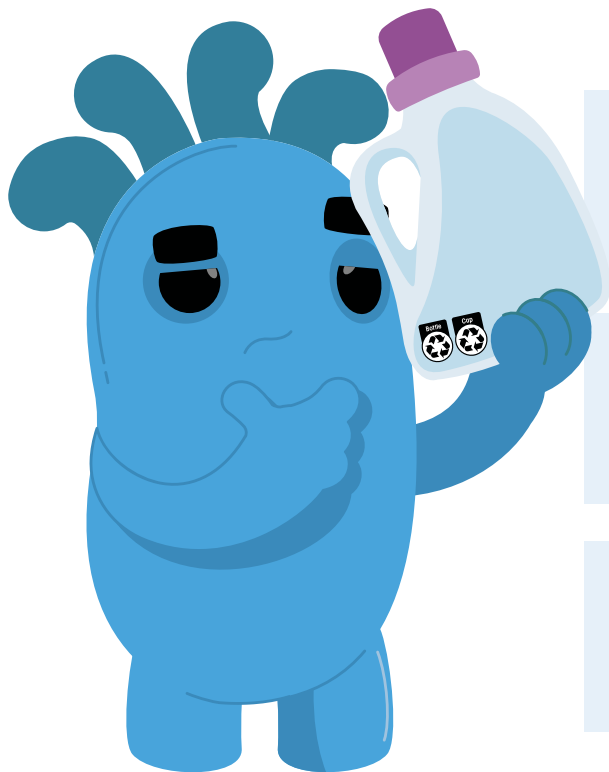
Frequency of looking for information by information source (%)

NET: At least once





Insight 2. Recycling is convenient – but confusing!



83%

Most Australians think recycling at home is convenient.



50%

However, half find it confusing to know what can and cannot be recycled.



65%

Two thirds of Australians want more information about how to recycle.

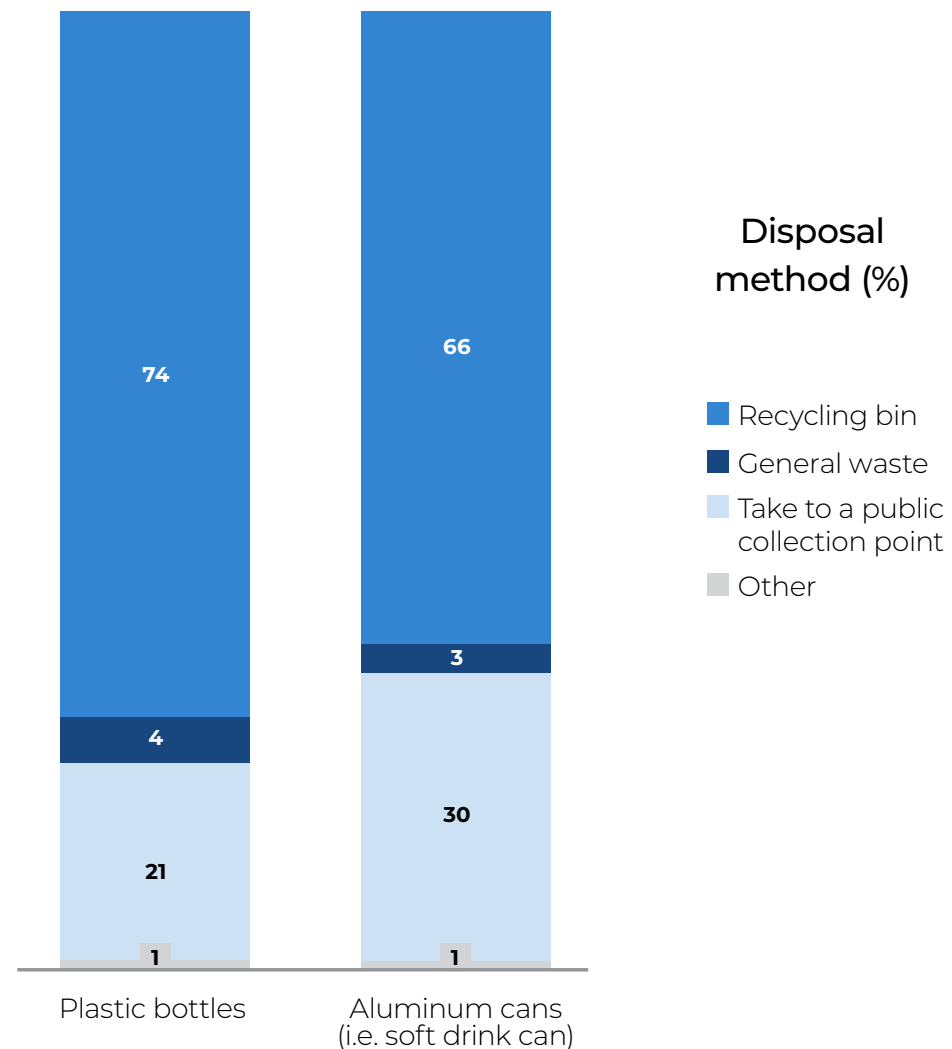


Insight 2. Recycling is convenient – but confusing!



Depending on the packaging and their location, consumers may use kerbside collection or container deposit schemes (CDS) as their preferred disposal method.

While the majority of Australians use kerbside recycling to dispose of plastic bottles (74%) and aluminium cans (66%), depending on their location, they may opt to use CDS to dispose of plastic bottles (a fifth of Australians) and aluminium cans (a third of Australians). This indicates that consumers are aware of and know how to engage with established away-from-home recycling initiatives.





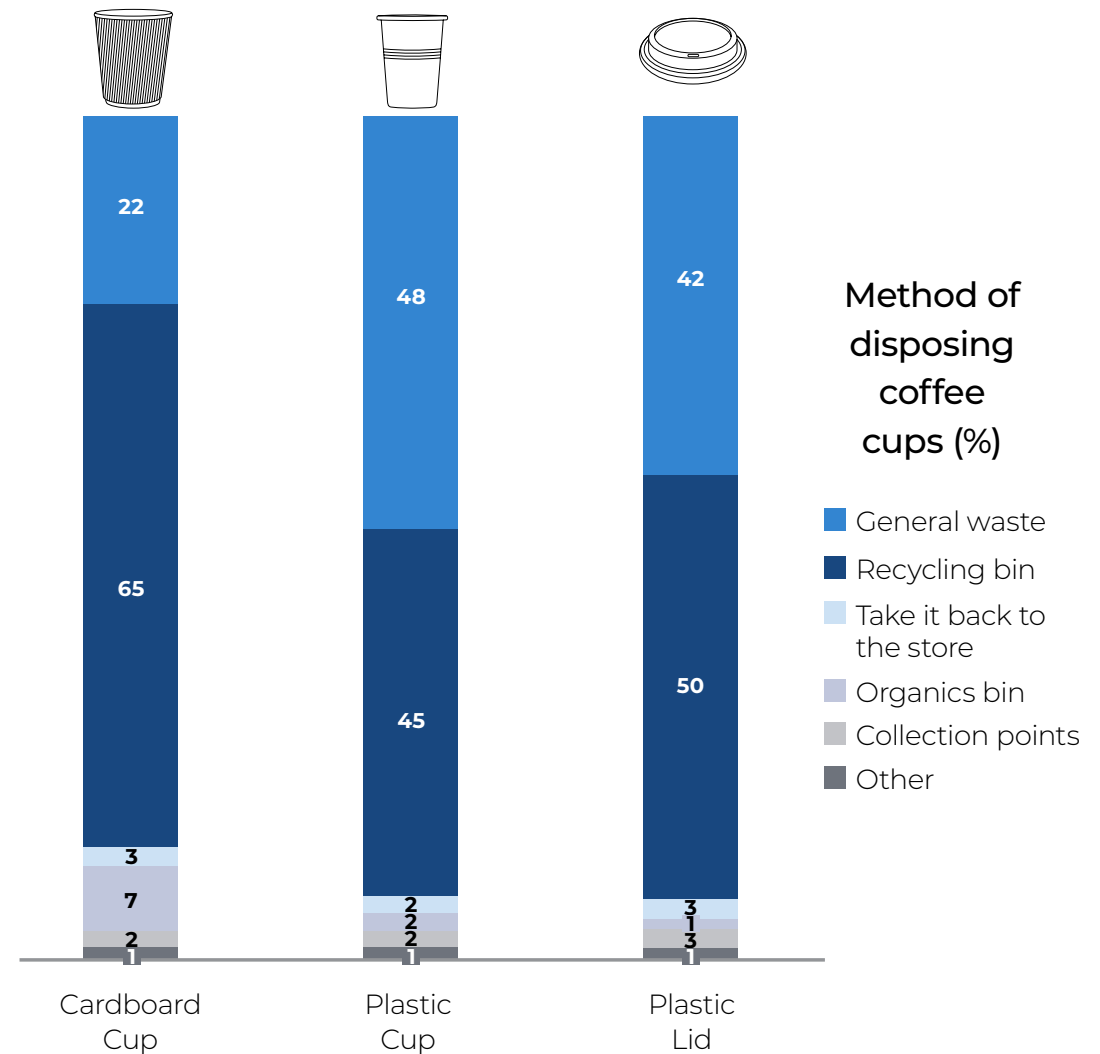
Insight 2. Recycling is convenient – but confusing!



We all know Australians love their coffee! While remembering a reusable cup is often the best option, significant confusion remains about how to dispose of takeaway coffee cups.

More than half of respondents cited recycling as the correct end-of-life option for coffee cup parts. Depending on consumers' location, there may also be options to drop-off cups to a collection point or place them in the organics disposal.

Clear and accurate instructions on all coffee cup packaging including lids, are needed to ensure clean waste streams and more education is needed to increase awareness about established programs where consumers can drop-off their coffee cups for recycling.





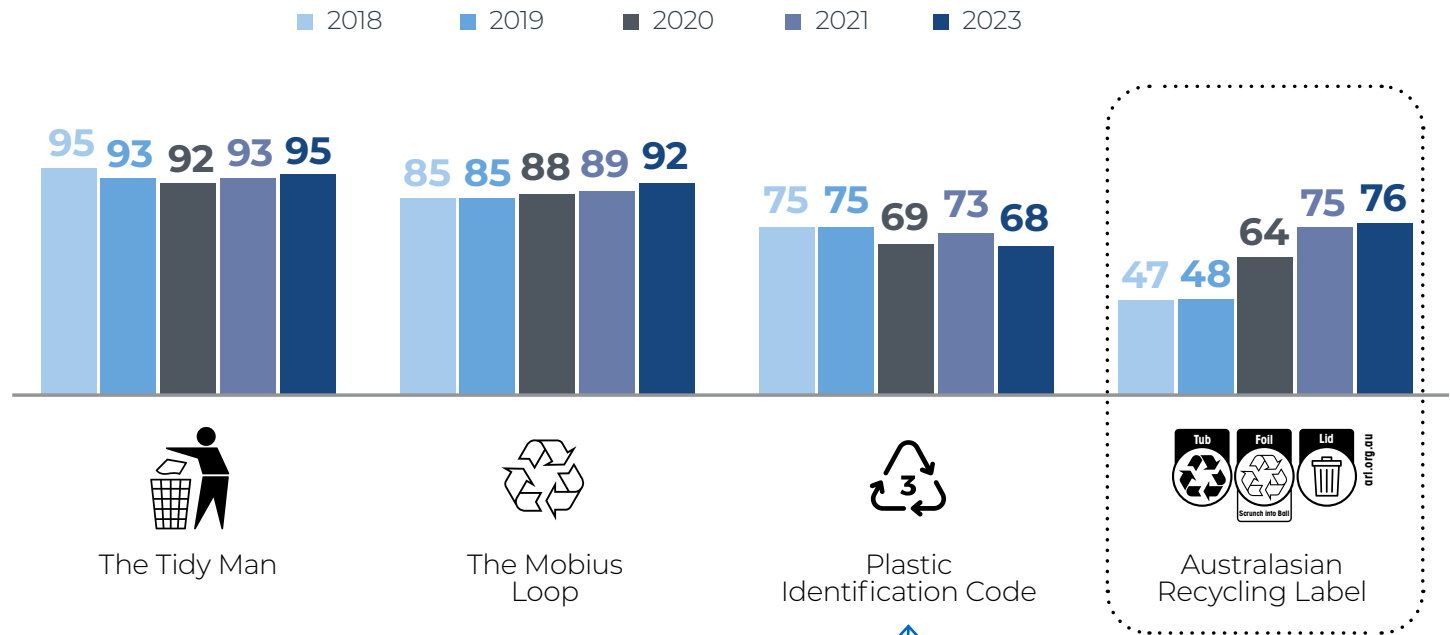
Insight 3. Australians recognise and value the ARL.



Awareness of the ARL among Australians remains high in 2023, at 76%

For the first time, the ARL was comfortably more recognisable than Plastic Identification Codes (PICs) – often misunderstood as recycling symbols.

How aware are consumers of common logos seen on-pack?



Did you know? Plastic Identification Codes (PICs) often seen on packaging and products indicate the type of plastic the material is, and are not an indicator of recyclability!





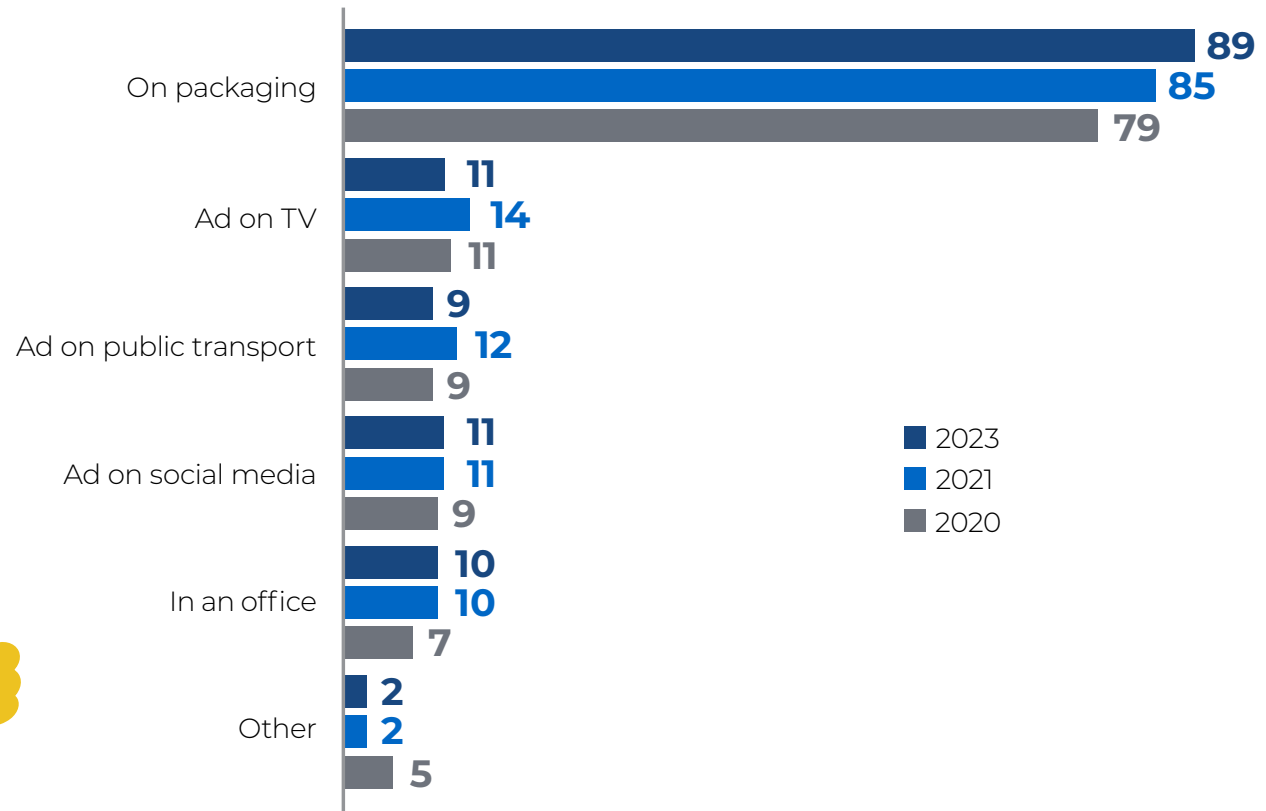
Insight 3. Australians recognise and value the ARL.



Awareness of the ARL on product packaging continues to increase and remains the primary place people recall seeing the ARL, with 10% growth in the last three years.



Source of exposure to the ARL (%)



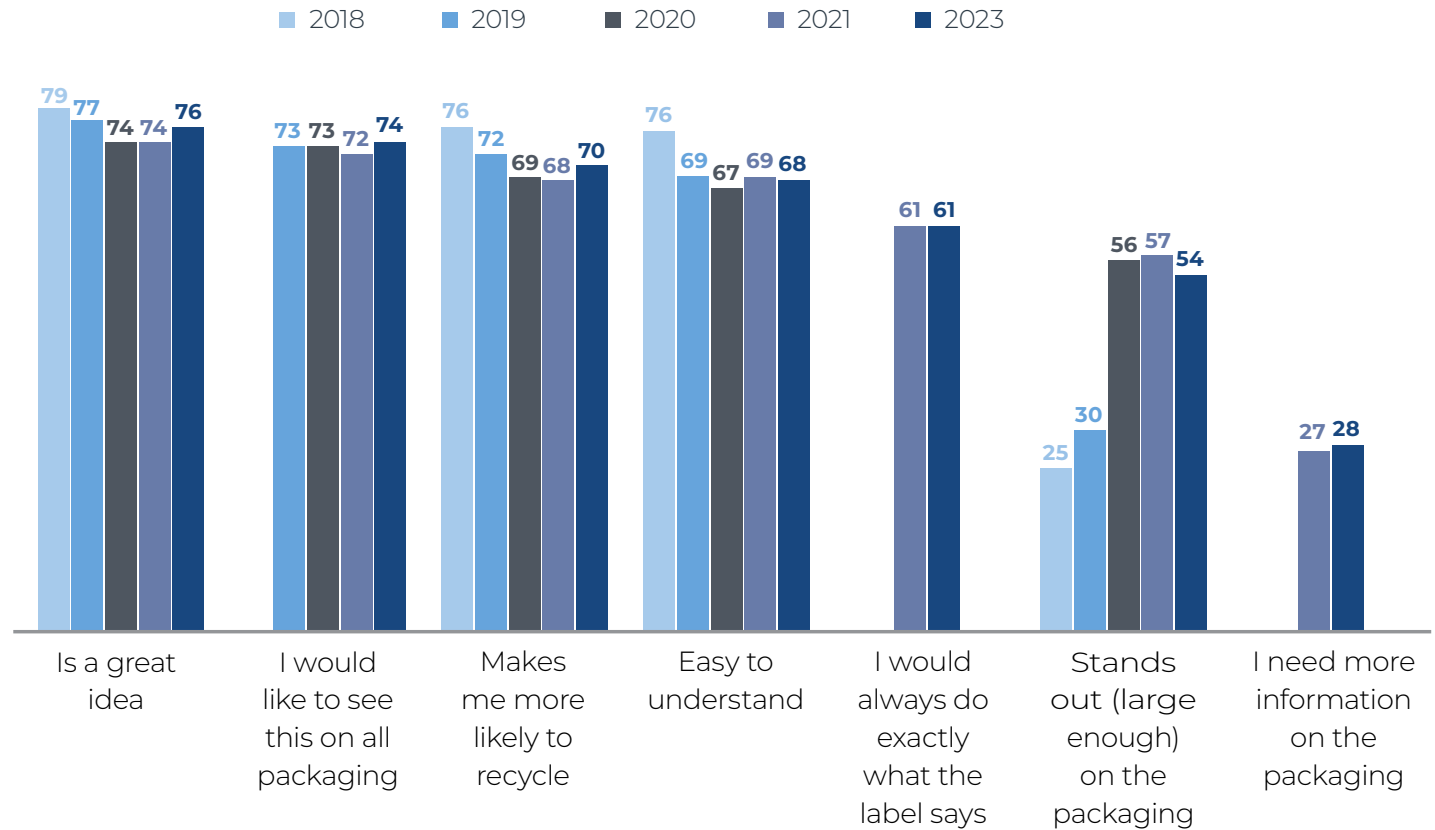


Insight 3. Australians recognise and value the ARL.



As in previous years, consumers like the ARL.

Three quarters of Australians think it's a great idea and want to see it on all packaging, while **more than two-thirds** find it easy to understand and say it increases their likelihood of recycling.



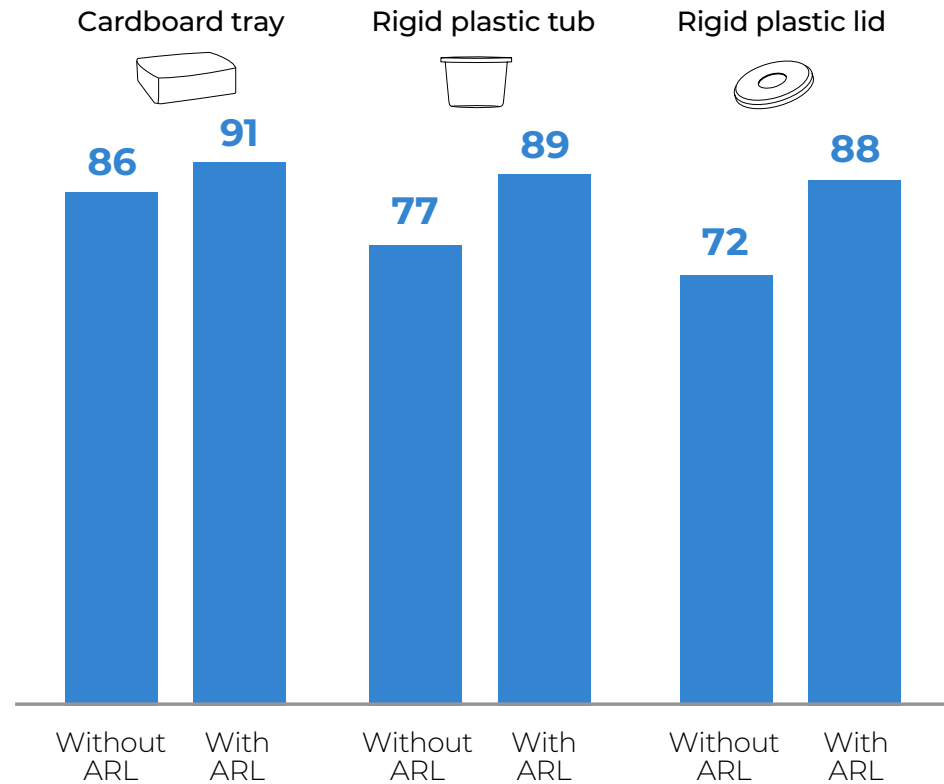


Insight 4. The ARL makes people better recyclers.



While Australians generally get the disposal behaviours for these more simple items right without the ARL, when the ARL is used on-pack, the rate of correct disposal behaviours continues to rise, consistently improving recycling rates.

Disposal behaviours with and without the ARL shown (%)





Insight 4. The ARL makes people better recyclers.

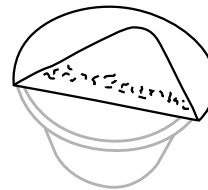


Consumers can still be confused about how to correctly dispose of some packaging materials, like aluminium foil.

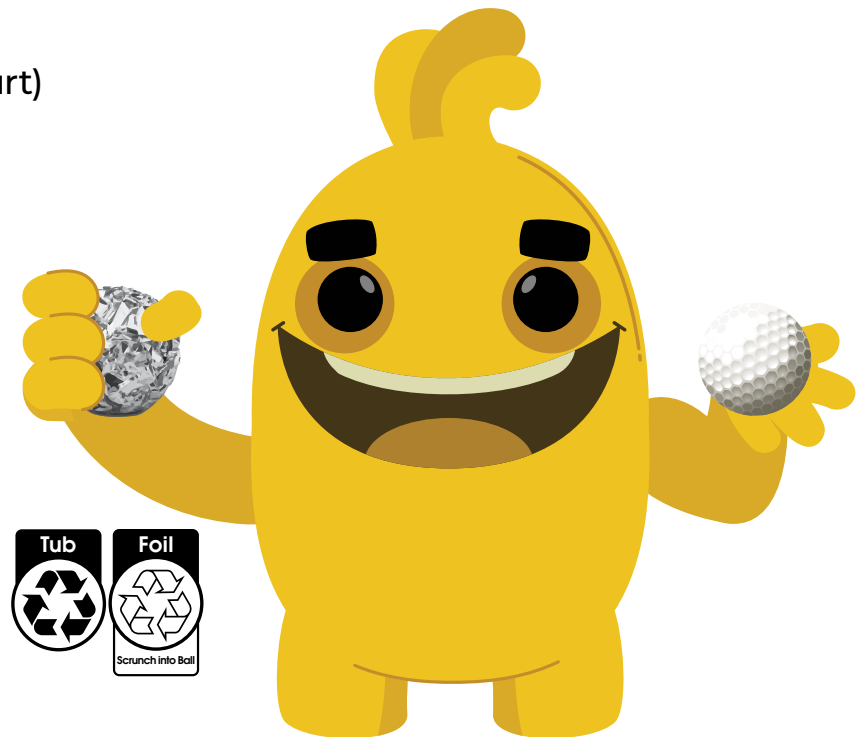
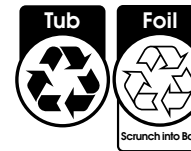
While further education is required to help Australians successfully recycle these packaging items, the ARL still helps to reduce confusion.

Aluminium foil lid (yoghurt)

Without ARL
40%



With ARL
60%





Insight 4. The ARL makes people better recyclers.

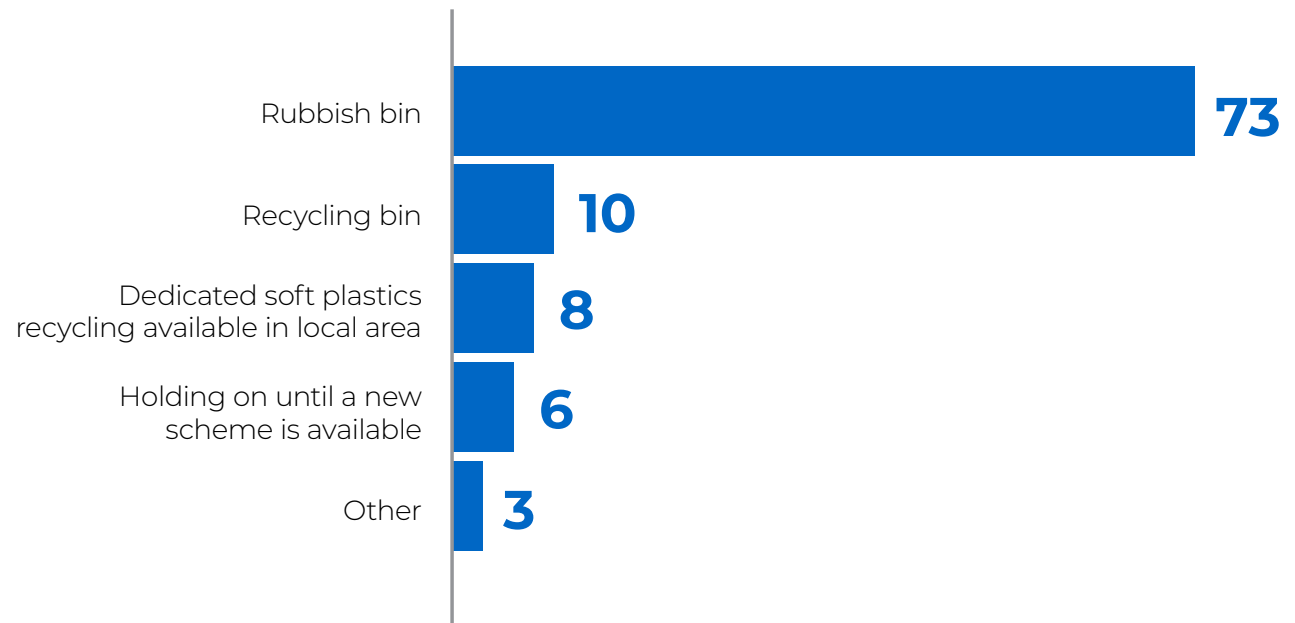


What are Australians doing with their soft plastics currently?

The majority of consumers claim to dispose of soft plastic in the general waste bin (73%).

This is a positive outcome compared to putting it in the recycling bin and causing contamination in the waste stream.

Current disposal of soft plastics (%)





Insight 4. The ARL makes people better recyclers.

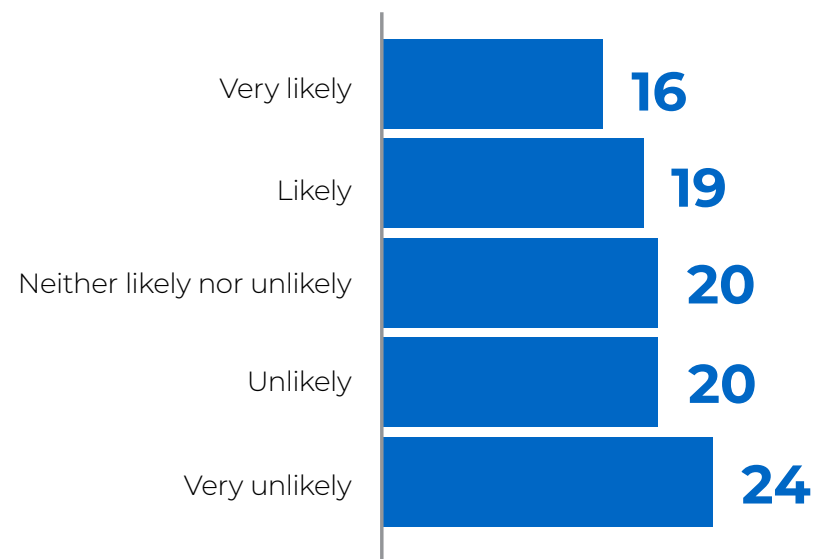


Following the discontinuation of REDcycle, there is no longer a soft plastics recycling scheme available for many Australians. Australians are divided about whether they will use soft plastics recycling services in the future. Positively, 35% of Australians still say they would drop off their soft plastics if a scheme was available. As future schemes are put in place, education and clear information are necessary to maintain support for the right recycling behaviour.

Australians hold different views about whether they will use soft plastics recycling services in the future – with 1 in 3 (35%) Australians indicating they are likely to return soft plastics to a scheme once it becomes available.

This may reflect trust and awareness issues following the closure of REDcycle. Communications around soft plastic recycling in the future will need to **rebuild consumer trust.**

Likelihood to drop off in store if a scheme was available (%)





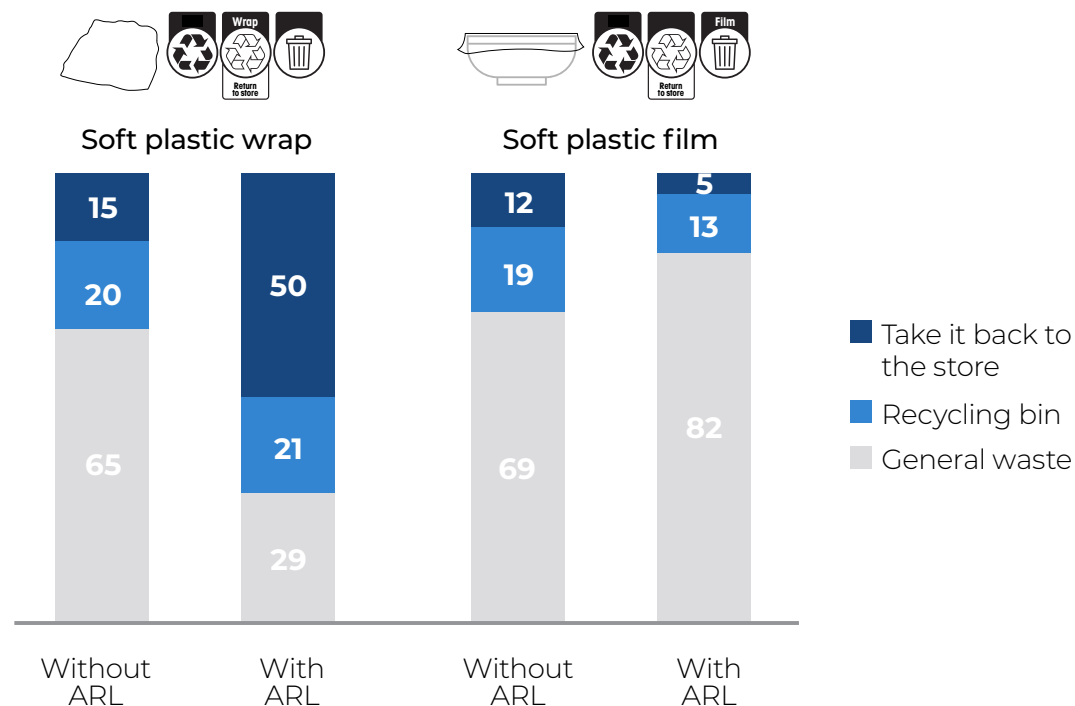
Insight 4. The ARL makes people better recyclers.



When presented with two soft plastic packaging items without the ARL, consumers were equally inclined to discard them in the general waste stream.

When the ARL was present, despite differing disposal outcomes (Conditionally Recyclable and Not Recyclable) on each item, consumers' correct disposal behaviour increased. As future schemes come in place, education and clear information is needed to continue supporting the right recycling behaviour.

Consumers' intended behaviour for soft plastic with and without ARL (%)



The survey participants were shown soft plastic packaging items with and without the ARL and were asked how they would recycle these items.

New Zealand

Results





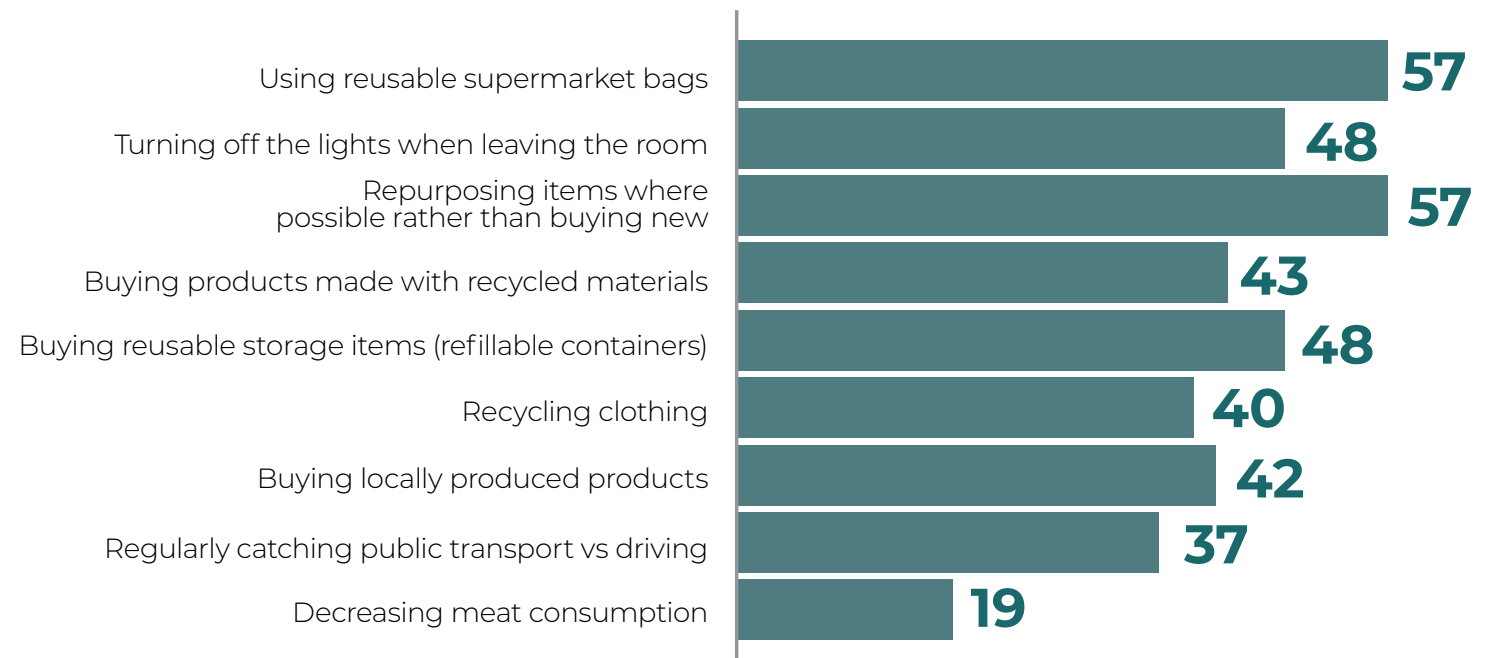
Insight 1. New Zealanders know recycling matters



New Zealanders value recycling, with three quarters (76%) seeing it as the action that is most helpful for the environment.

Over a quarter (29%) of New Zealanders also want access to a greater range of bins/disposal services.

Like Australians, New Zealanders consider recycling **more impactful** than (%):





Insight 2. Recycling is convenient – but confusing!



86%

The majority of New Zealanders believe that recycling is convenient.



50%

of New Zealanders agree that 'Knowing what I can and can't recycle at home is confusing.'



69%

A majority also want more information about how to recycle.



88%

of New Zealanders actively looked for information in the last 6 months – showing consumers are keen for information about correct packaging disposal.



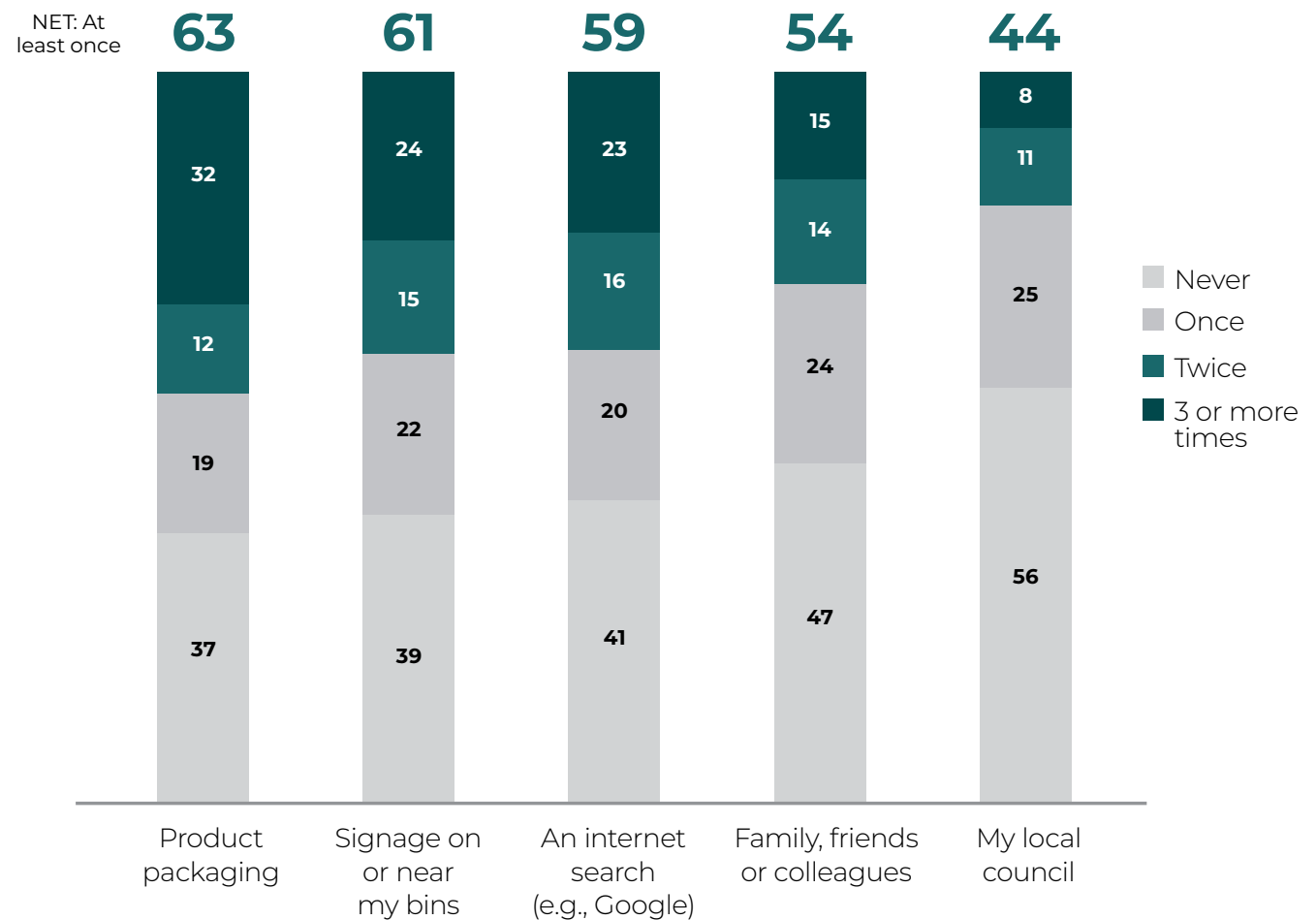
Insight 2. Recycling is convenient – but confusing!



Product packaging is the main source of recycling information, with 63% of New Zealanders looking here.

Bin signage (61%), the internet (59%) and family, friends or colleagues (54%) are the other main sources of information about recycling.

Frequency of looking for information by information source (%)



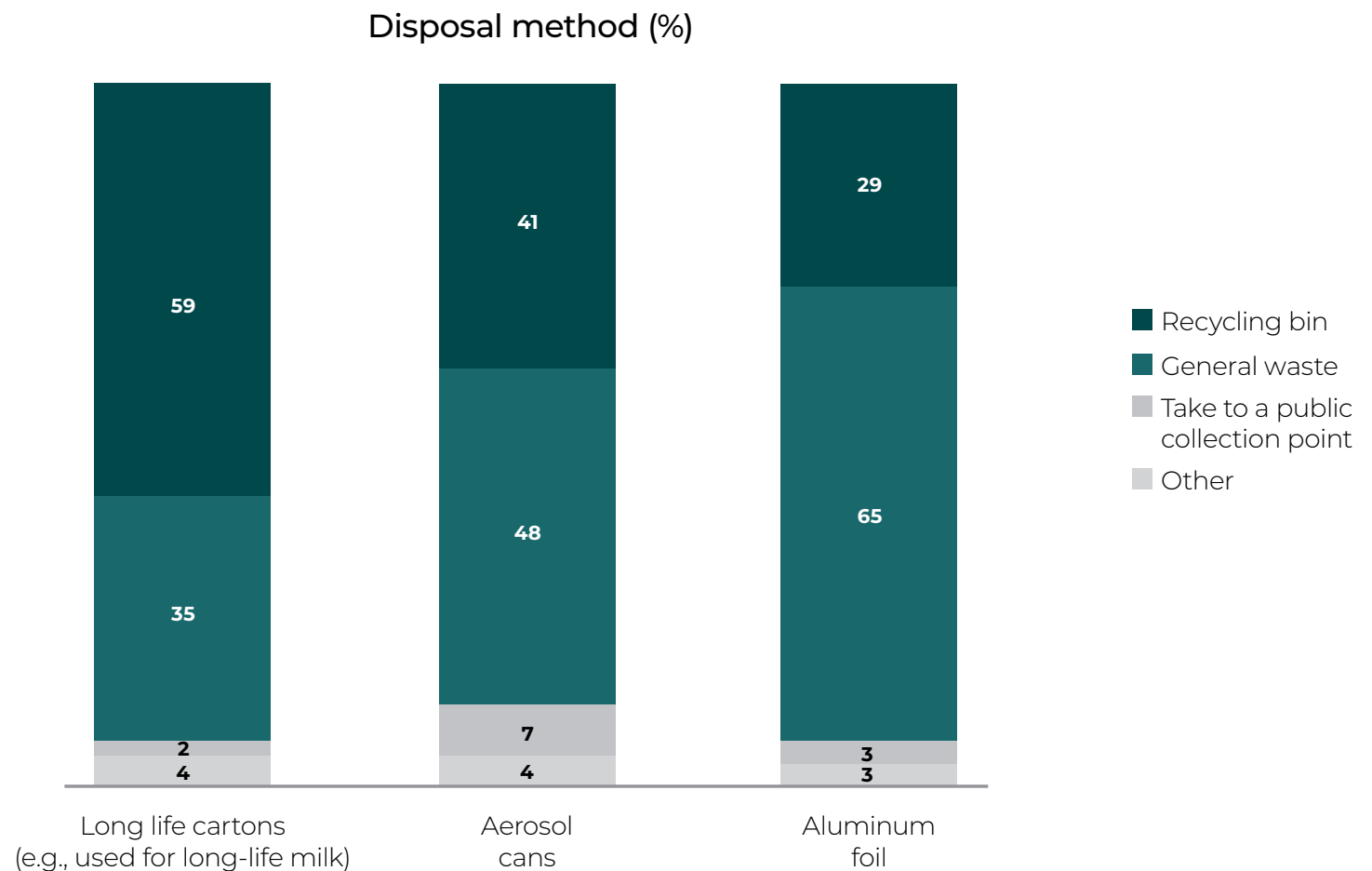


Insight 2. Recycling is convenient – but confusing!



New Zealanders are confident recyclers when it comes to simple materials.

However, there is some confusion about long-life cartons, aluminium foil and aerosol cans.



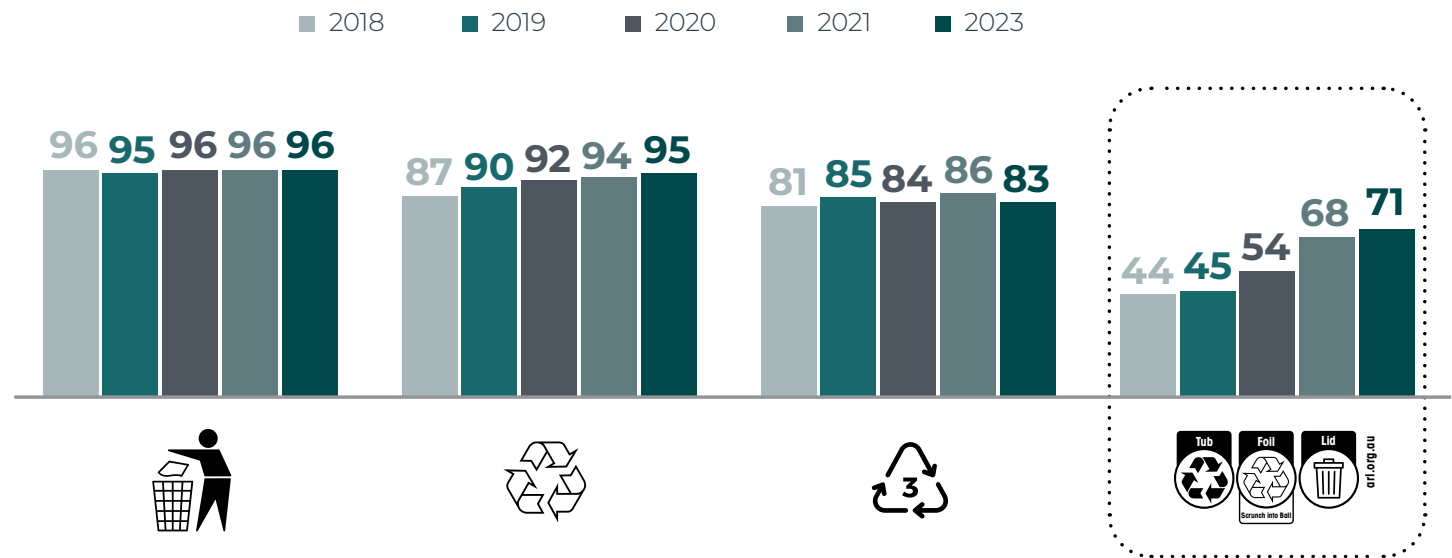


Insight 3. New Zealanders recognise and value the ARL



Awareness of the ARL continues to steadily grow in New Zealand and its recognition is catching up to other known logos like the general Mobius loop and Tidy Man.

How aware are consumers of common logos seen on-pack?





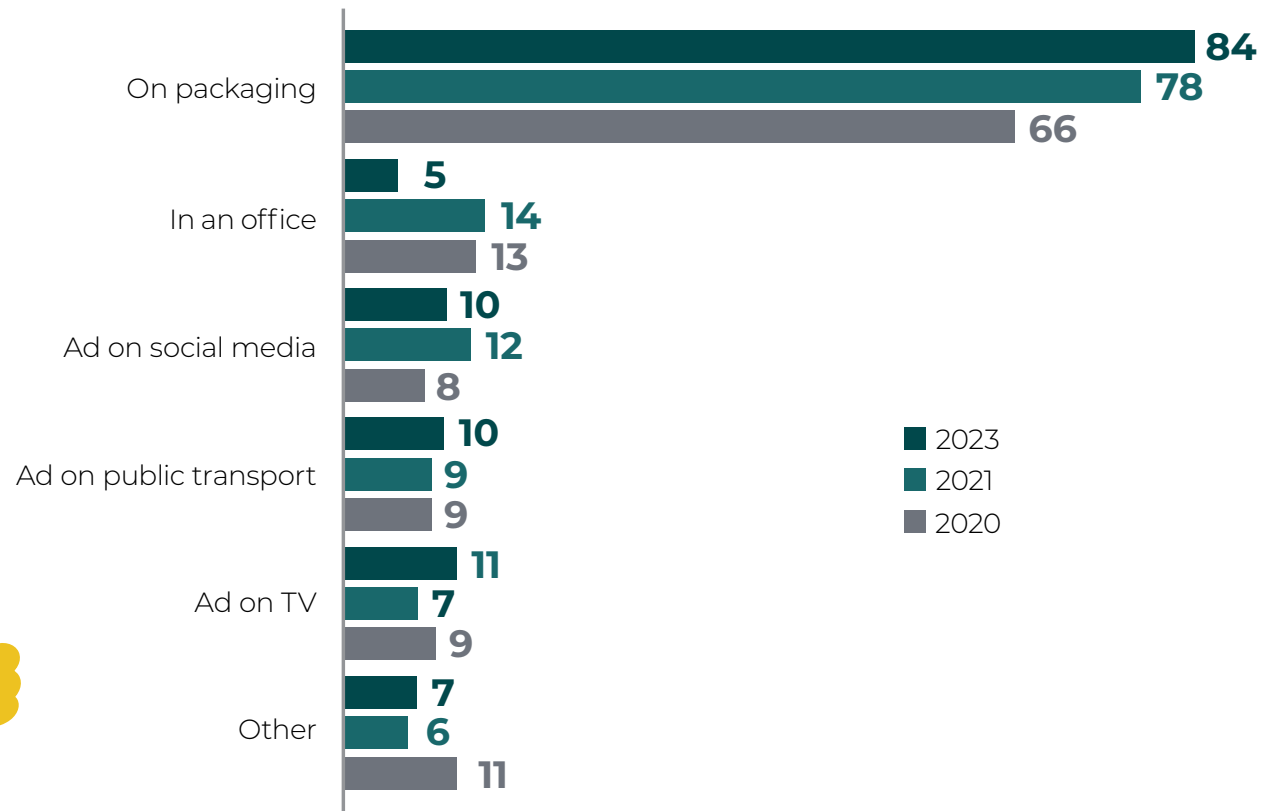
Insight 3. New Zealanders recognise and value the ARL



Product packaging remains the primary place New Zealanders recall seeing the ARL – and this is growing quickly.



Source of exposure to the ARL (%)



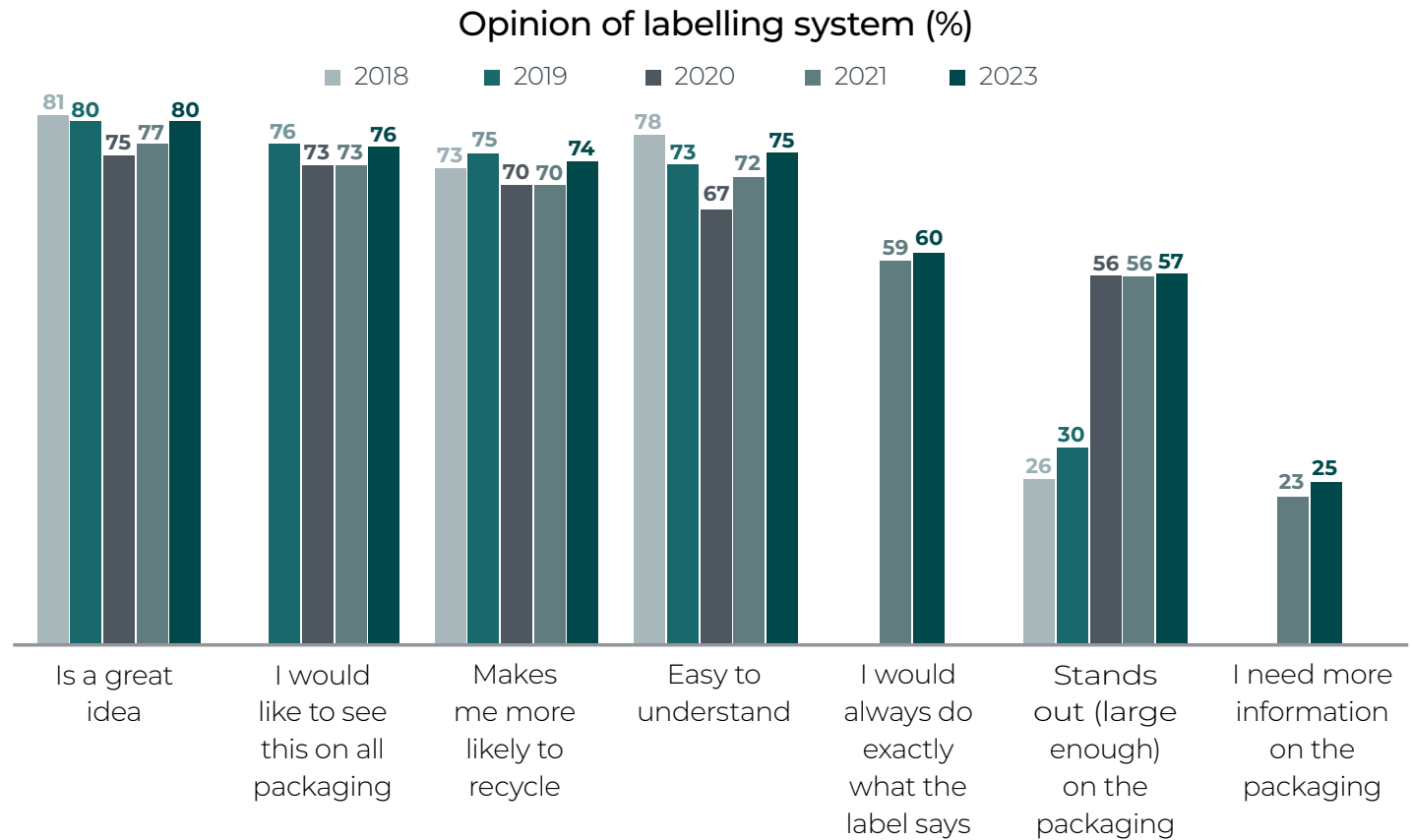


Insight 3. New Zealanders recognise and value the ARL



As in previous years, New Zealanders like the ARL – they think it’s a great idea (80%), find it easy to understand (75%) and want to see it on all packaging (76%).

The ARL also improves people’s intention to recycle – 74% of New Zealanders say the ARL makes them more likely to recycle.



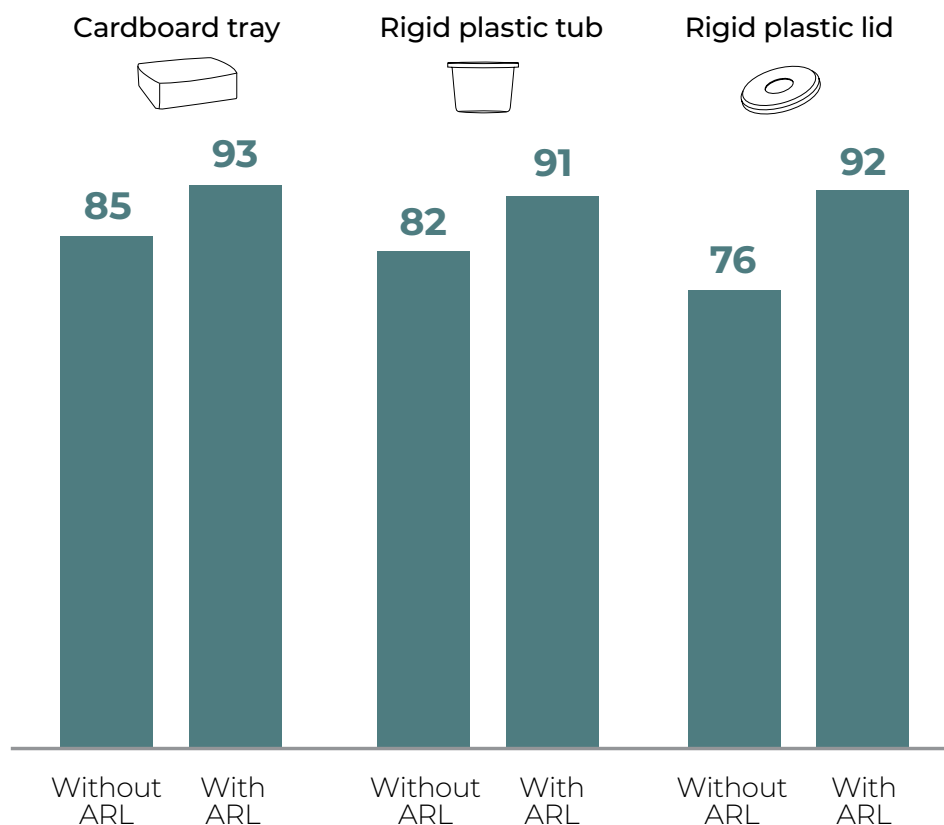


Insight 4. The ARL makes people better recyclers.



While New Zealanders generally get the disposal behaviours for these more simple items right without the ARL, when the ARL is used on-pack, the rate of correct disposal behaviours continues to rise, consistently improving recycling rates.

Disposal behaviours with and without the ARL shown (%)





Insight 4. The ARL makes people better recyclers.

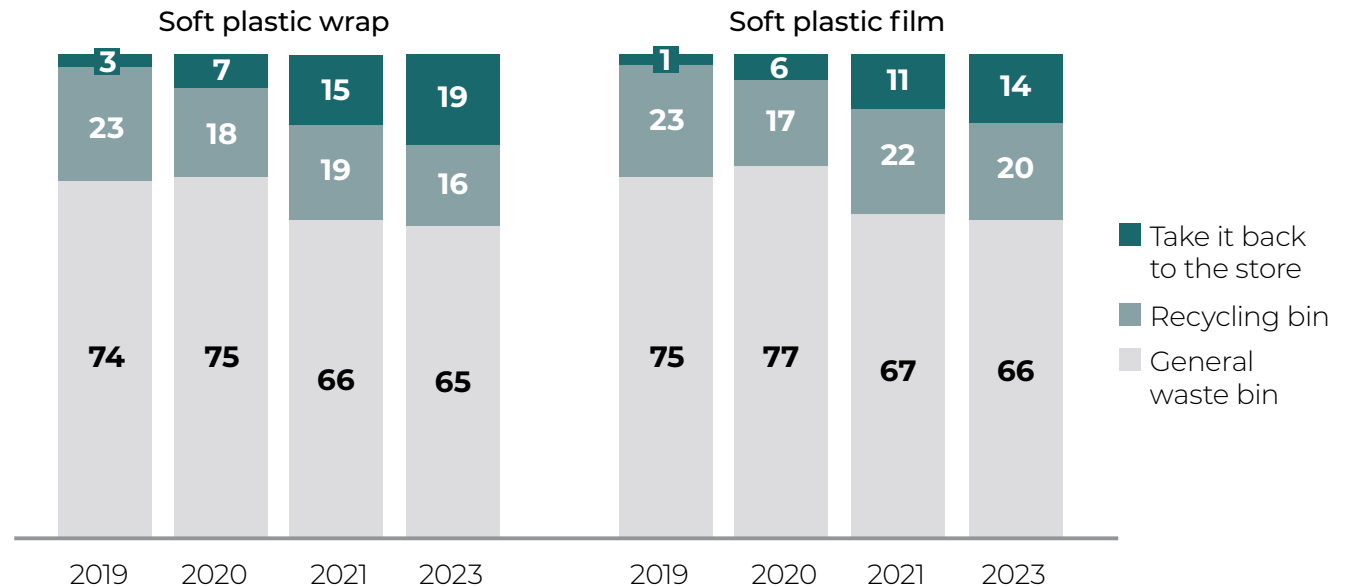
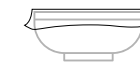


The majority of consumers claim to dispose of soft plastic in the general waste bin (wrap – 65%, film – 66%). This is a positive action compared to putting it in the recycling bin and causing contamination.

There has been a steady increase over time in the proportion of consumers returning plastic wrap to store, and a decrease in the number incorrectly disposing of soft plastics in the recycling bin – however with a fifth still depositing soft plastics in the recycling bin, there is a long way to go.

Soft plastics

Disposal behaviour for soft plastic packaging items when the ARL is not shown (%)



In New Zealand, the Soft Plastic Recycling Scheme enables consumers to drop off their soft plastics at participating retail stores to be recycled.



Insight 4. The ARL makes people better recyclers.



The ARL significantly improves understanding of how to correctly dispose of soft plastics (19% to 56%). However, many New Zealanders are still confused (1 in 5 incorrectly listing recycling bin as the correct destination for soft plastic wrap) demonstrating a strong need for further consumer education and awareness building.

Soft plastics

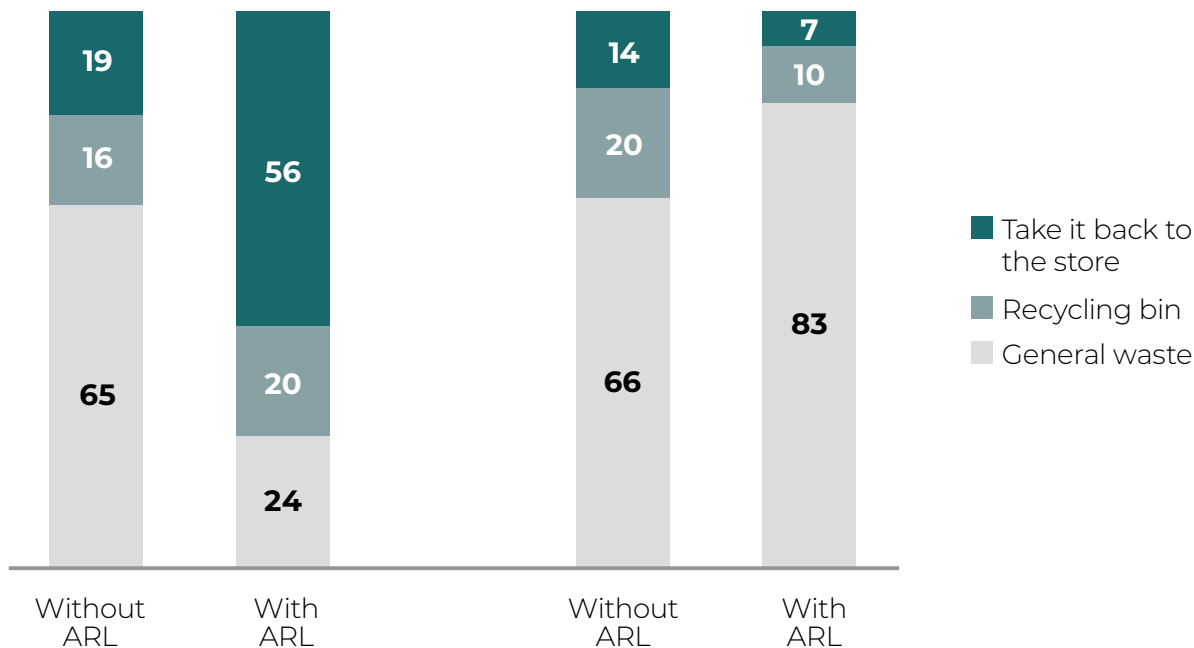
How should dispose of each – ARL shown (%)



Soft plastic wrap

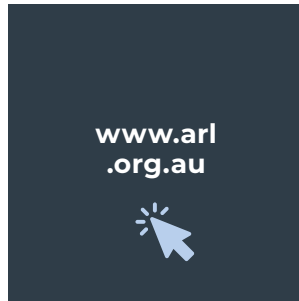


Soft plastic film

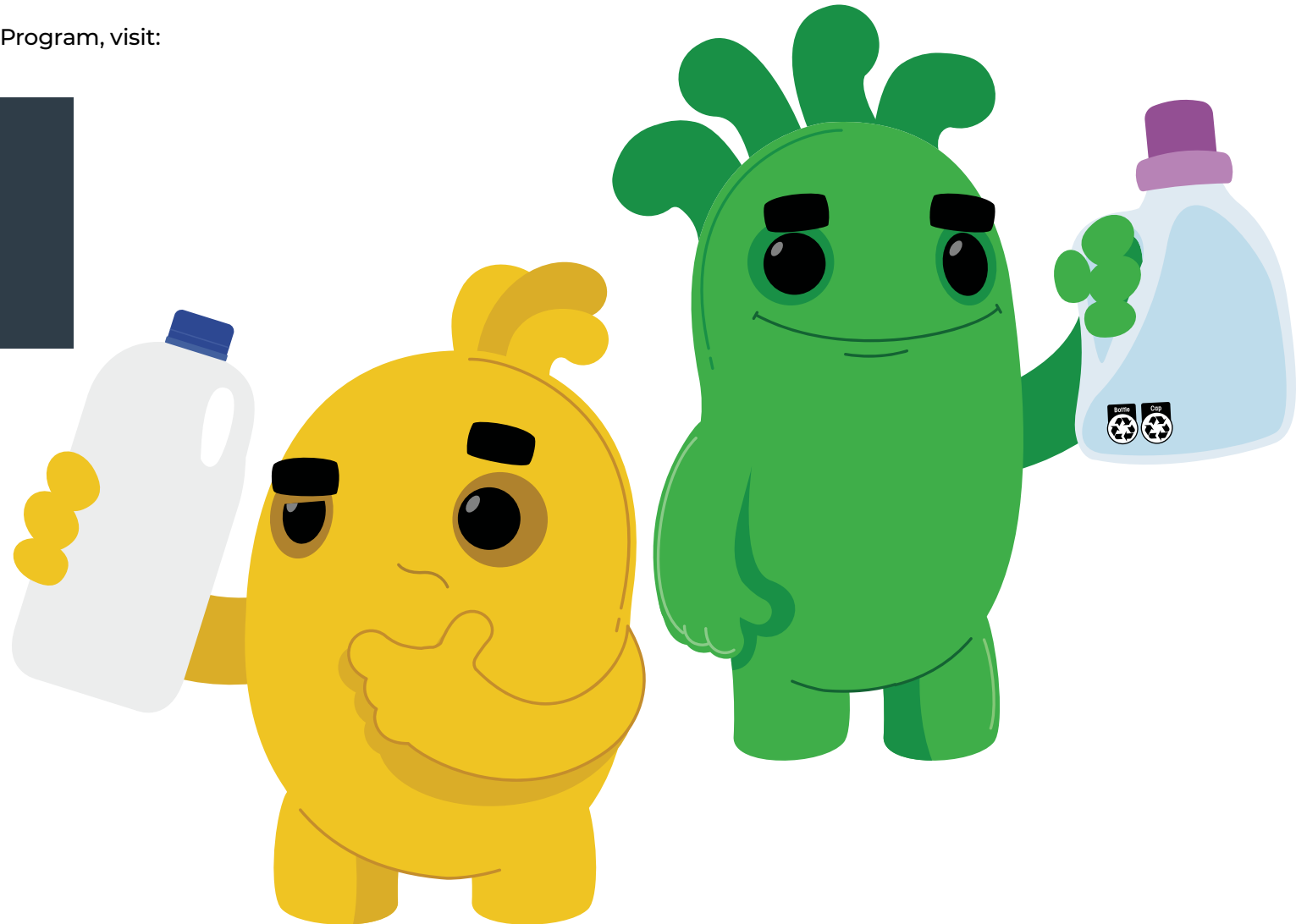


WANT TO KNOW MORE?

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