

VERSION 1: JUNE 2021



AUSTRALASIAN RECYCLING LABEL CONSUMER INSIGHTS REPORT 2021



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DEVELOPED BY THE AUSTRALIAN PACKAGING COVENANT ORGANISATION AND PLANET ARK



FOREWORD

From casting their vote at the cash register to the individual choices we make at the bin, consumers can play a powerful role in improving Australia's approach to waste and recycling. Everyone, including industry, government and consumers, is vital to creating cleaner waste streams in Australia, while understanding attitudes and beliefs is crucial to getting everyone to recycle more and to recycle better. Taking the pulse of these attitudes through annual research is an essential part of the Australasian Recycling Label Program (ARL Program), which allows us to track the progress and impact of the Program and adapt our approach for the future.

This year's survey shows that the results are overwhelmingly positive – consumers care about recycling and the ARL is helping them to get better at it. Now in its third year, the ARL Program continues to go from strength to strength. In 2021 it has passed the 500th Member milestone, been recognised widely in the Australian Government's National Plastics Plan and been highlighted as a best practice example of consumer labelling by the UN Environment Programme. For industry, the message is clear: there has never been a better time to be involved. I look forward to welcoming all of you into the program, as we work together to support consumers to make informed decisions about getting the right packaging in the right bin.



Brooke Donnelly
CEO, APCO



How consumer insights drive change

Understanding, educating and empowering consumers will play a vital role in enabling Australia to meet the **2025 National Packaging Targets** and drive the transition to a circular economy for packaging.

Packaging designed for circularity

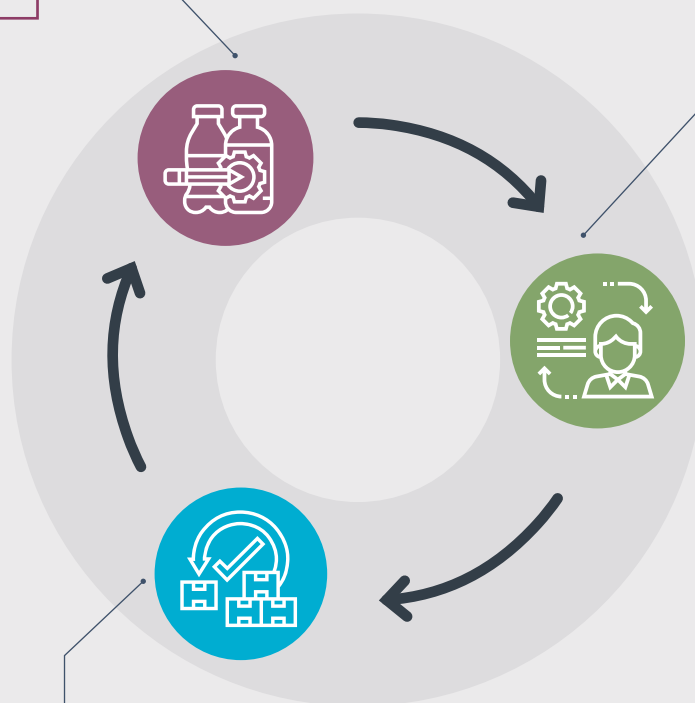
- Designing packaging that can be collected, recycled and converted into new products is an essential strategy for Australia to achieve all four of the 2025 Targets. Research shows that Australian consumers increasingly expect easy-to-recycle packaging, and this consumer demand sends a powerful message to industry to prioritise this work.

Improved collection and recycling systems

- Recovery rates are directly linked to the decisions everyday Australians make at the bin. The ARL Program is a powerful behaviour change program that educates consumers about correct packaging disposal at end-of-life. As consumer awareness of, and support for the ARL Program grows, so too does the clear business case for organisations to join and roll out the program across their operation.

Expanded markets for used packaging

- More effective recycling creates a cleaner stream of materials to be used in new products. Research shows that consumers are willing to support businesses using recycled materials in their packaging – and these insights provide a strong case for businesses to make the switch from virgin to recycled materials and drive change towards the 2025 Targets.



CONTENTS

Understanding consumer awareness and attitudes to recycling is critical to empowering everyone to recycle better and more often. This report draws on the Australasian Recycling Label's annual consumer benchmarking research. The research findings revealed the following 5 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.

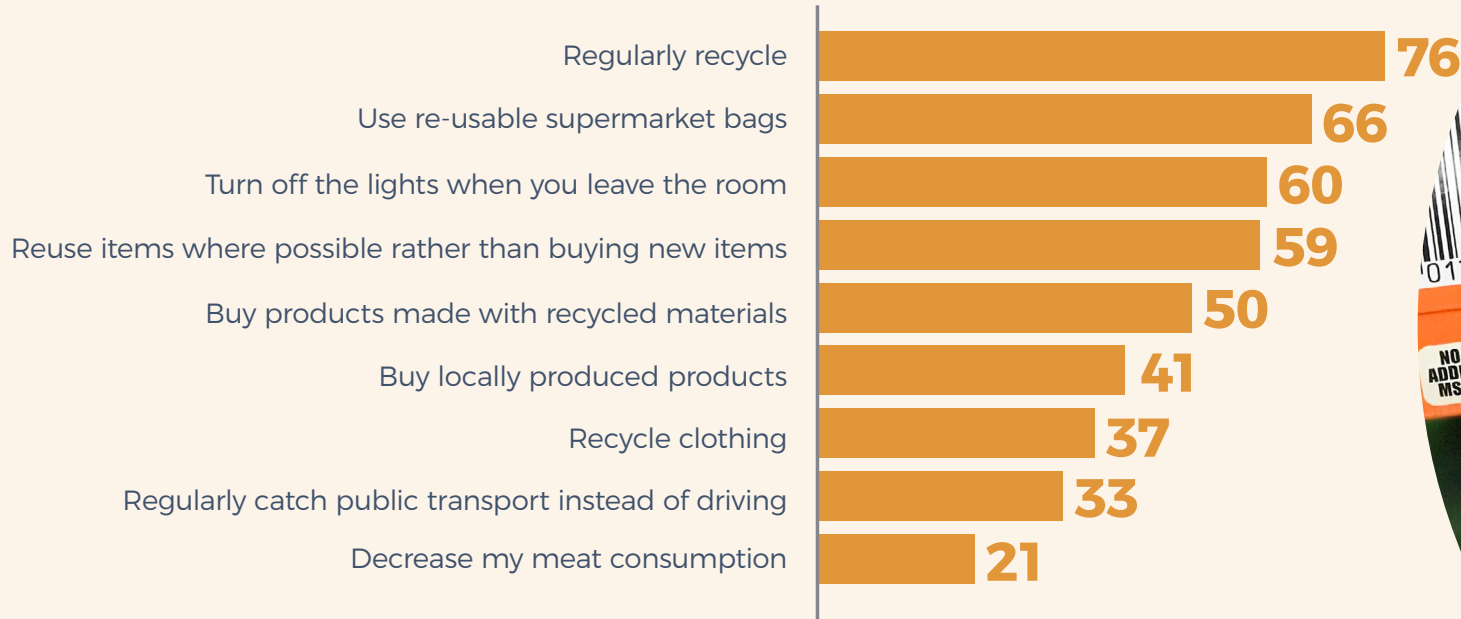


Insight 1.

Consumers value recycling

Australians care about recycling. Survey participants listed recycling as the single most important behaviour they can take to improve the environment. **Australians also think recycling is easy, convenient and the right thing to do.**

Which of these behaviours do you think are most helpful for the environment? (%)

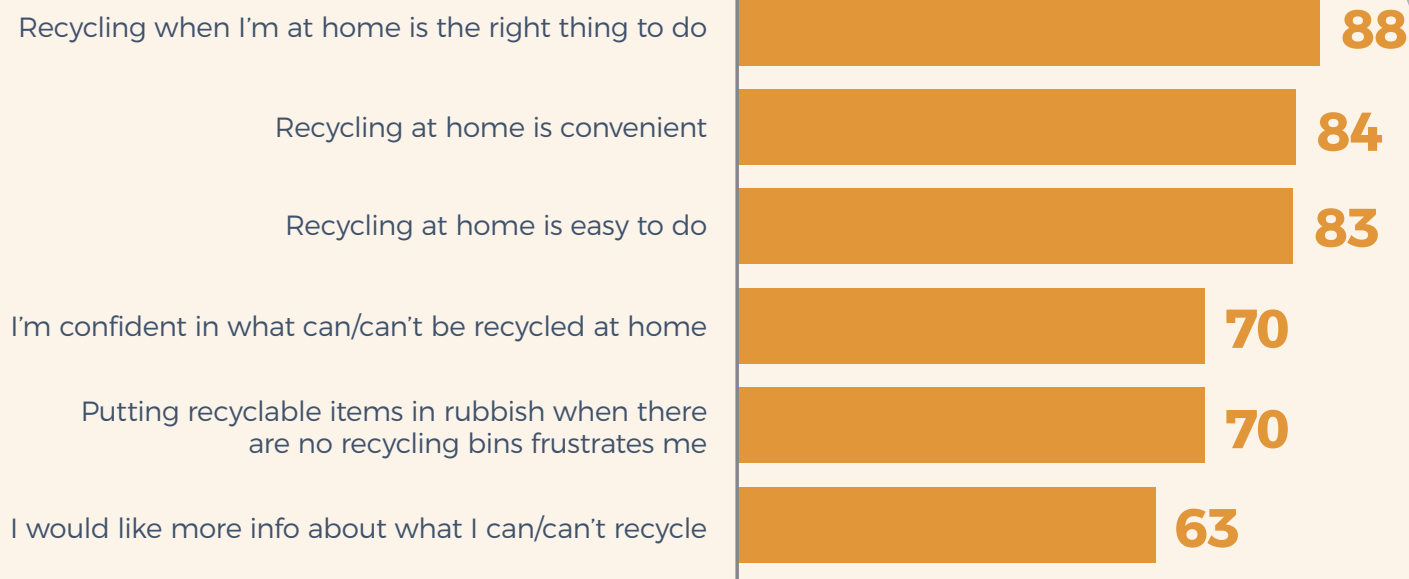




Insight 1.

Consumers value recycling

Consumers who strongly agree/agree with the following statements (%)



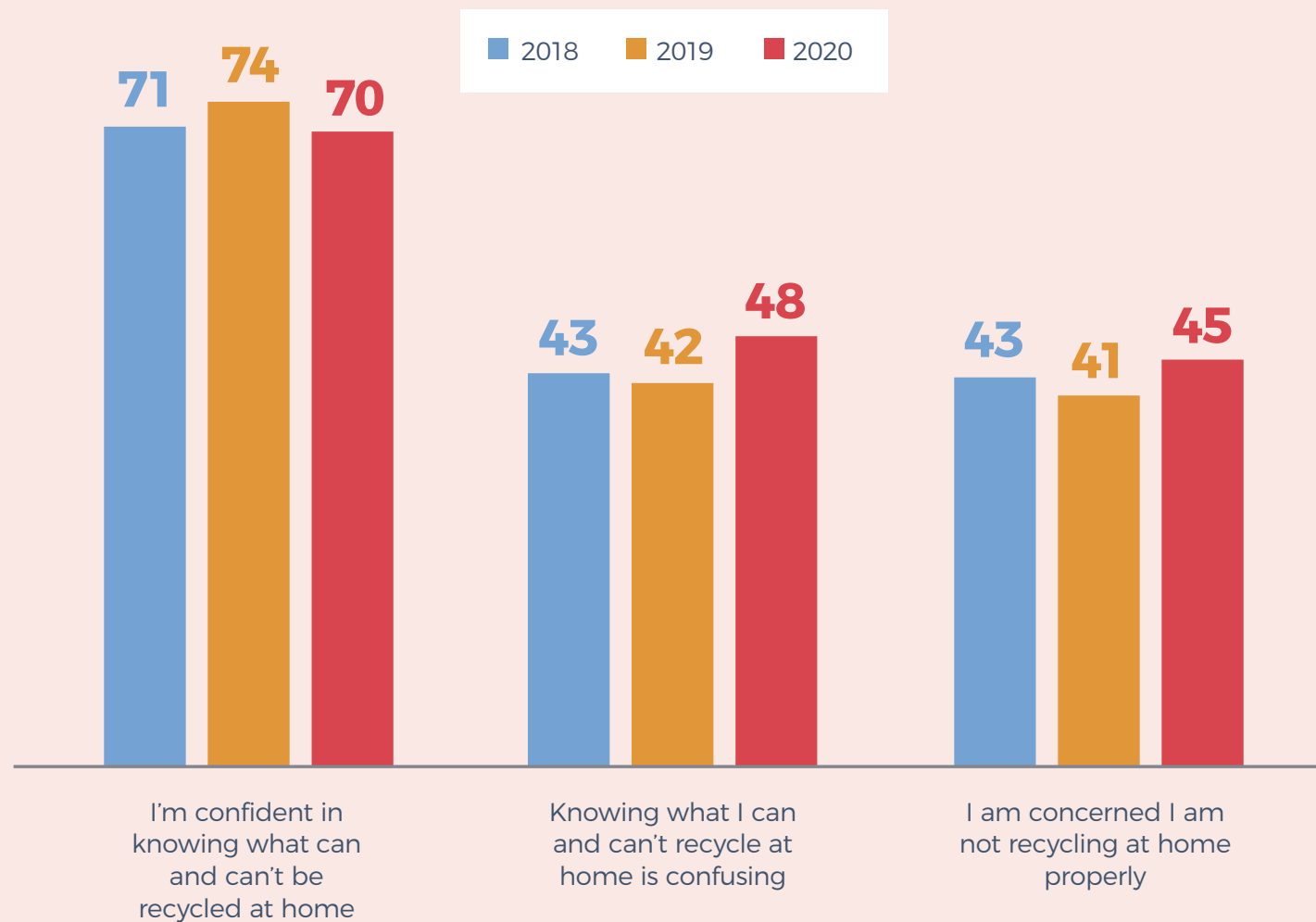


Insight 2.

Consumers want information on how to recycle right.

When it comes to recycling, **consumers are still struggling with confusion.**

Consumers who strongly agree/agree with the following statements (%)



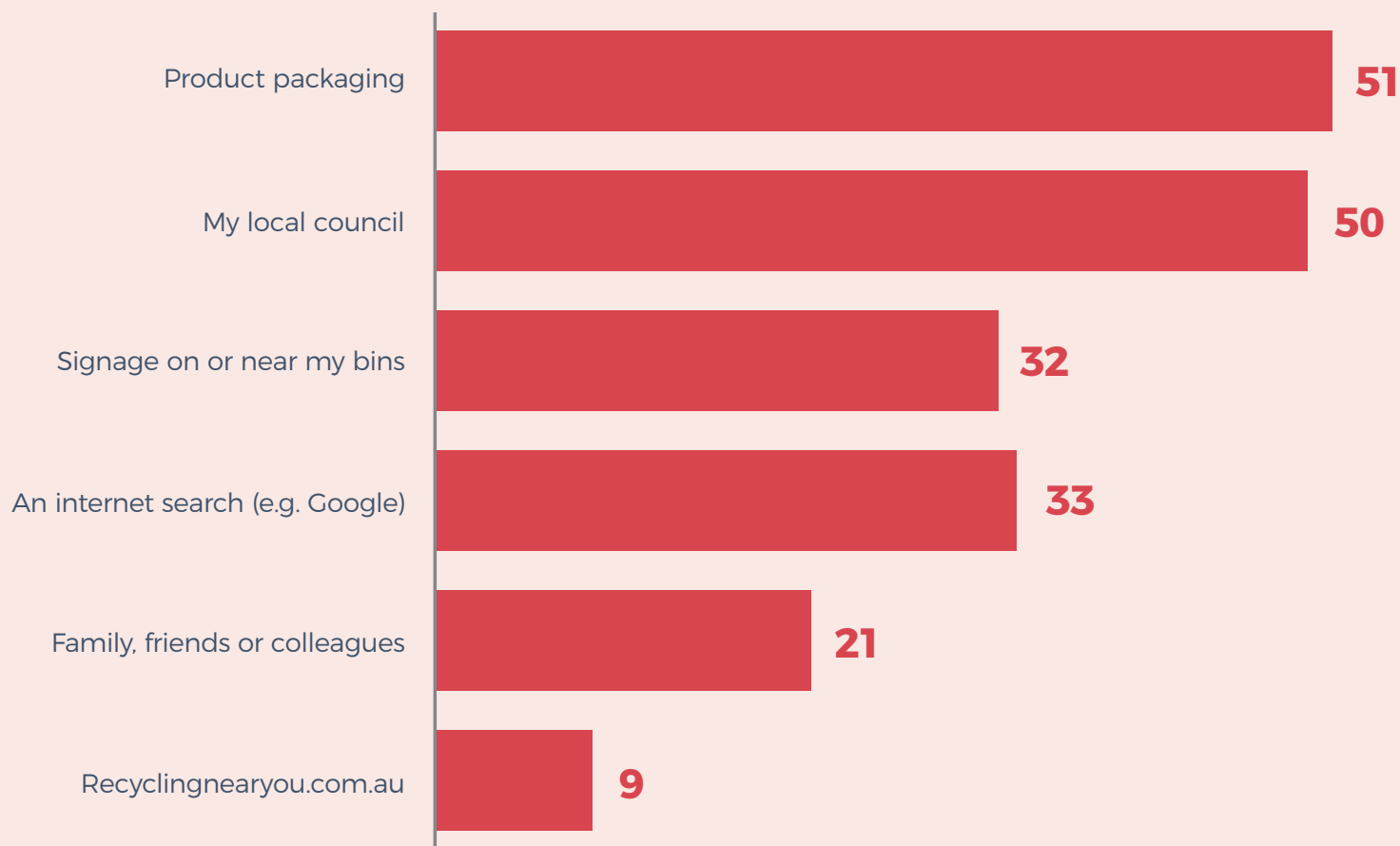


Insight 2.

Consumers want information on how to recycle right.

Product packaging and **local councils** are the two most common sources of recycling information that consumers turn to.

Where do consumers look for recycling information? (%)



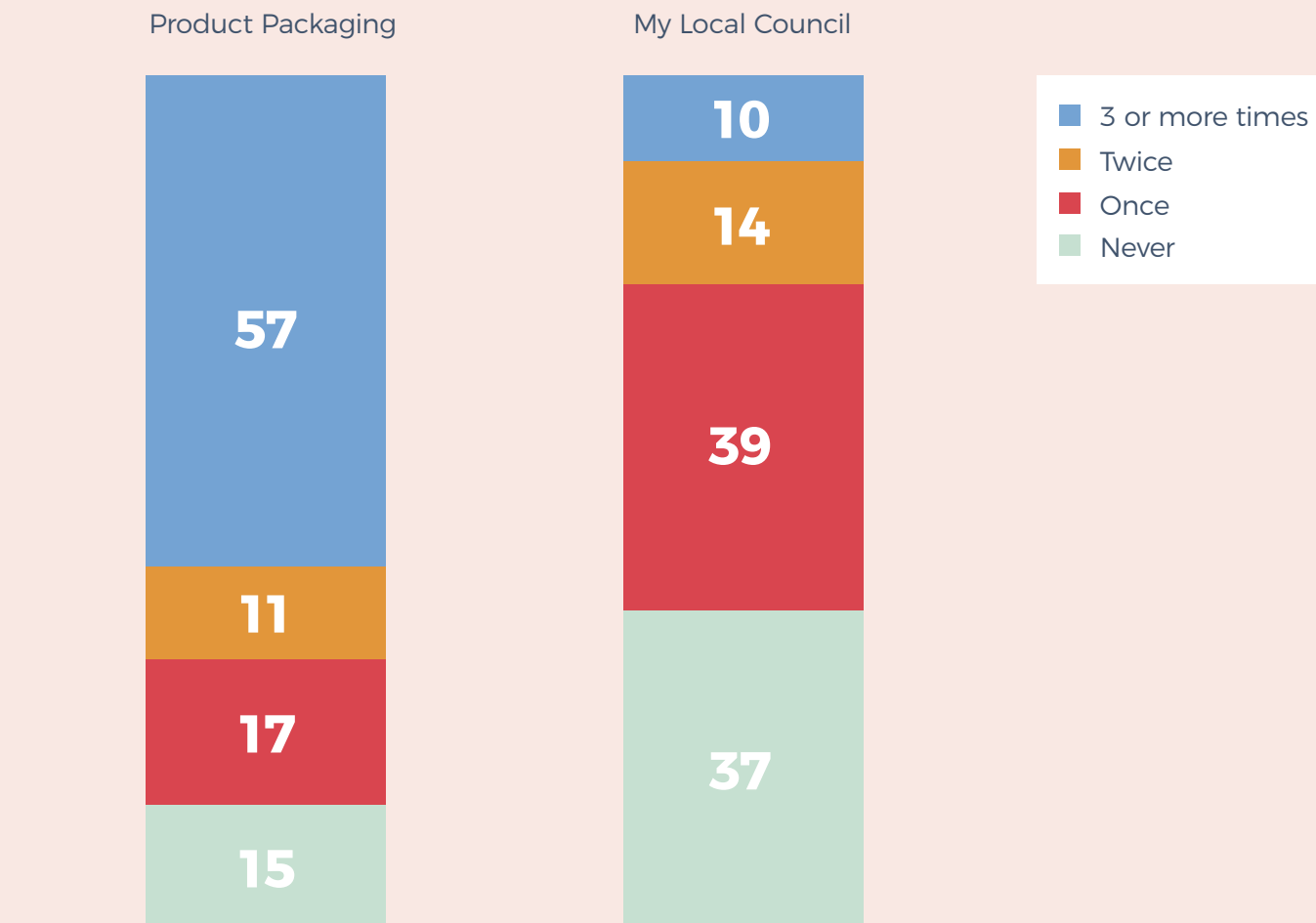


Insight 2.

Consumers want information on how to recycle right.

Consumers are most often looking to their product packaging to find recycling information. On-pack labelling conveniently provides specific information to consumers to know how to dispose of that packaging correctly.

In the past 6 months how often do consumers seek out recycling information and where do they look? (%)



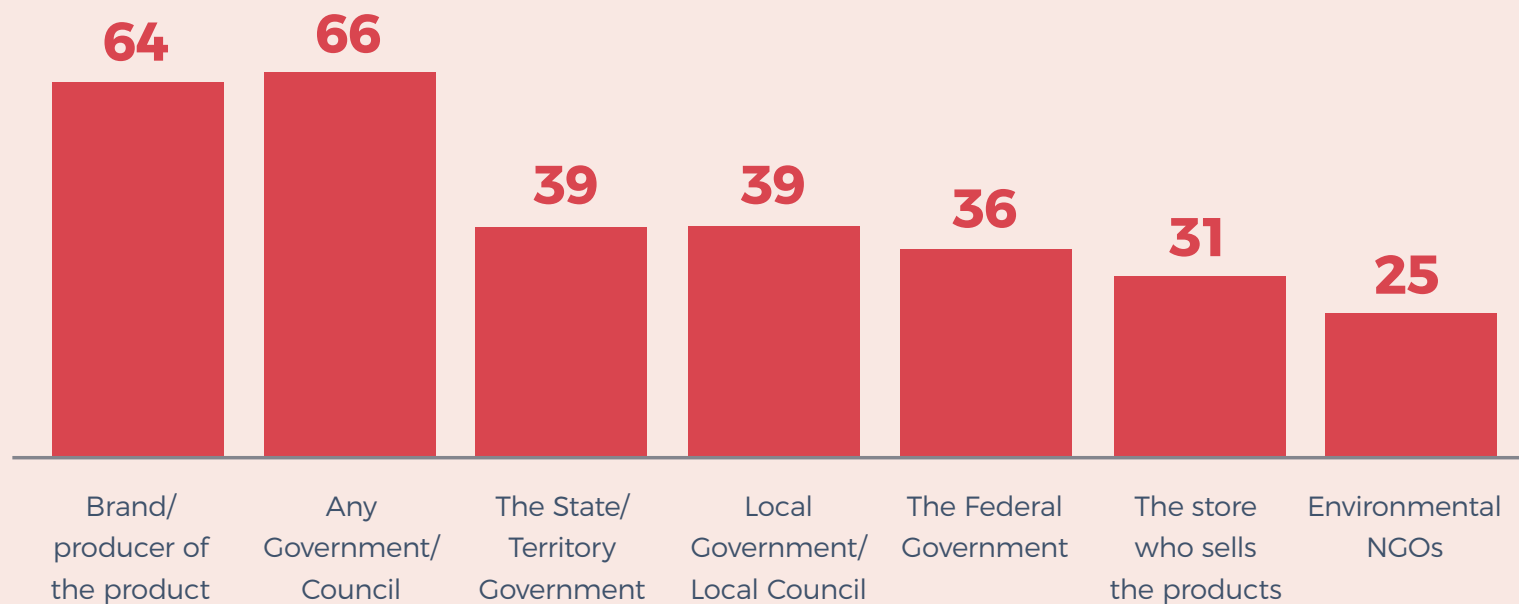


Insight 2.

Consumers want information on how to recycle right.

Two-thirds of consumers believe it is the responsibilities of brands and governments to provide recycling information about packaging.

Who do consumers think should be responsible for providing recycling information about packaging (%)



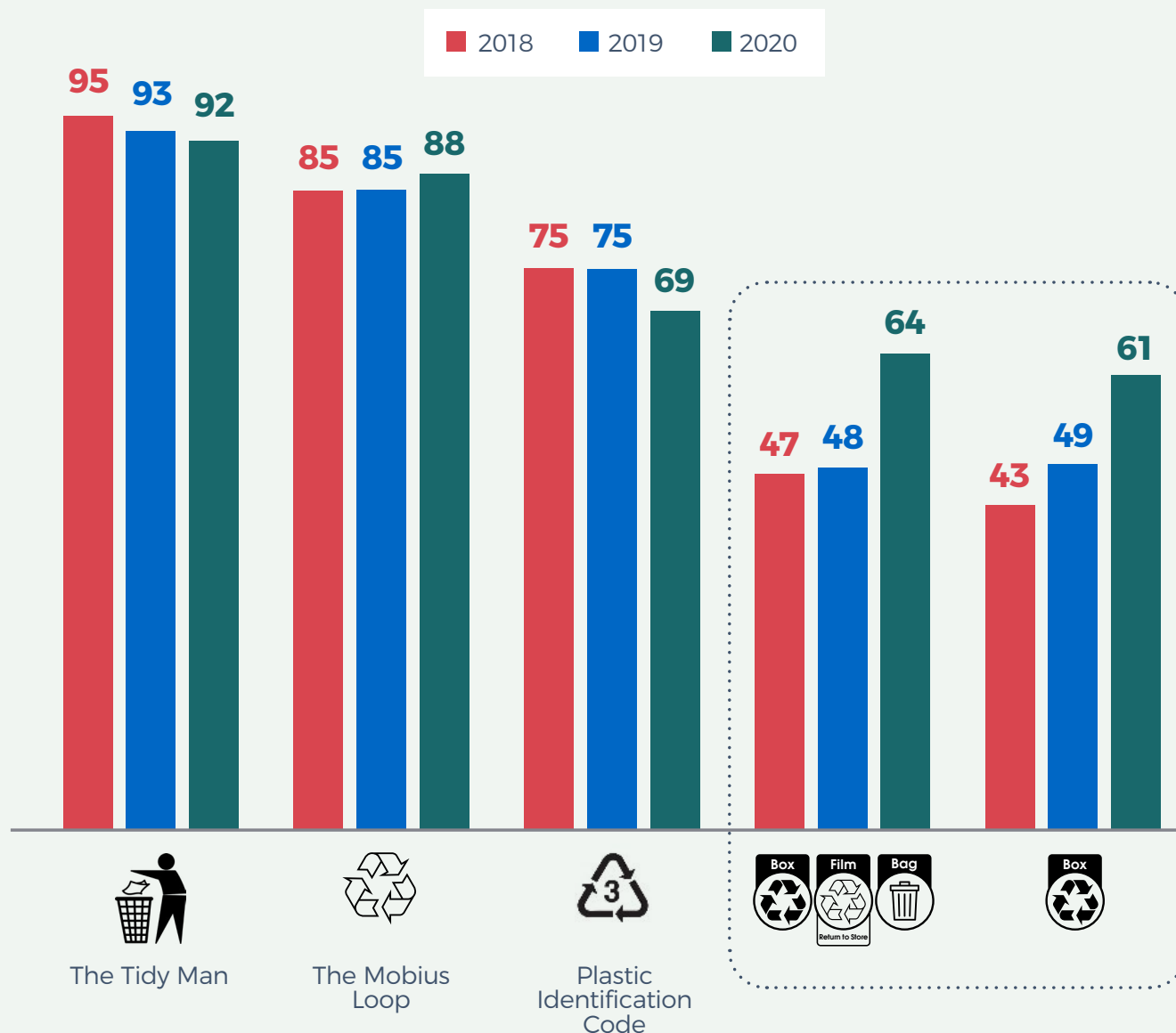


Insight 3.

Awareness of the ARL Program continues to grow.

While recognition of other labels on the market has decreased or remained consistent, since 2018, **consumer awareness of the ARL has grown significantly.**

How aware are consumers of common recycling and disposal logos? (%)





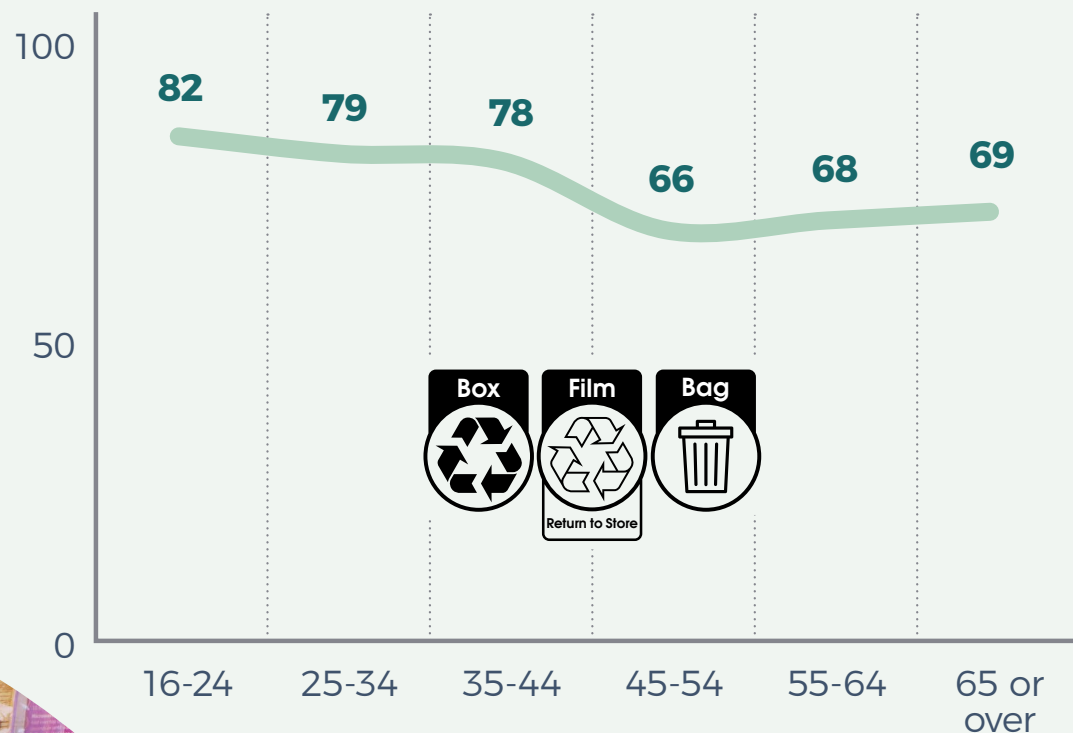
Insight 3.

Awareness of the ARL Program continues to grow.

Awareness of the ARL is particularly high among younger audiences.



Awareness of the ARL logo by respondent age (%)





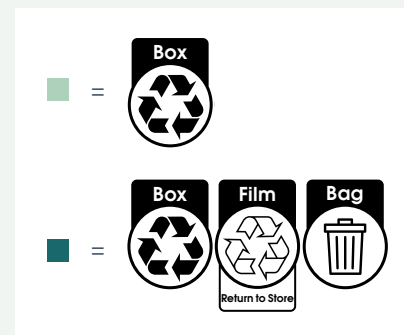
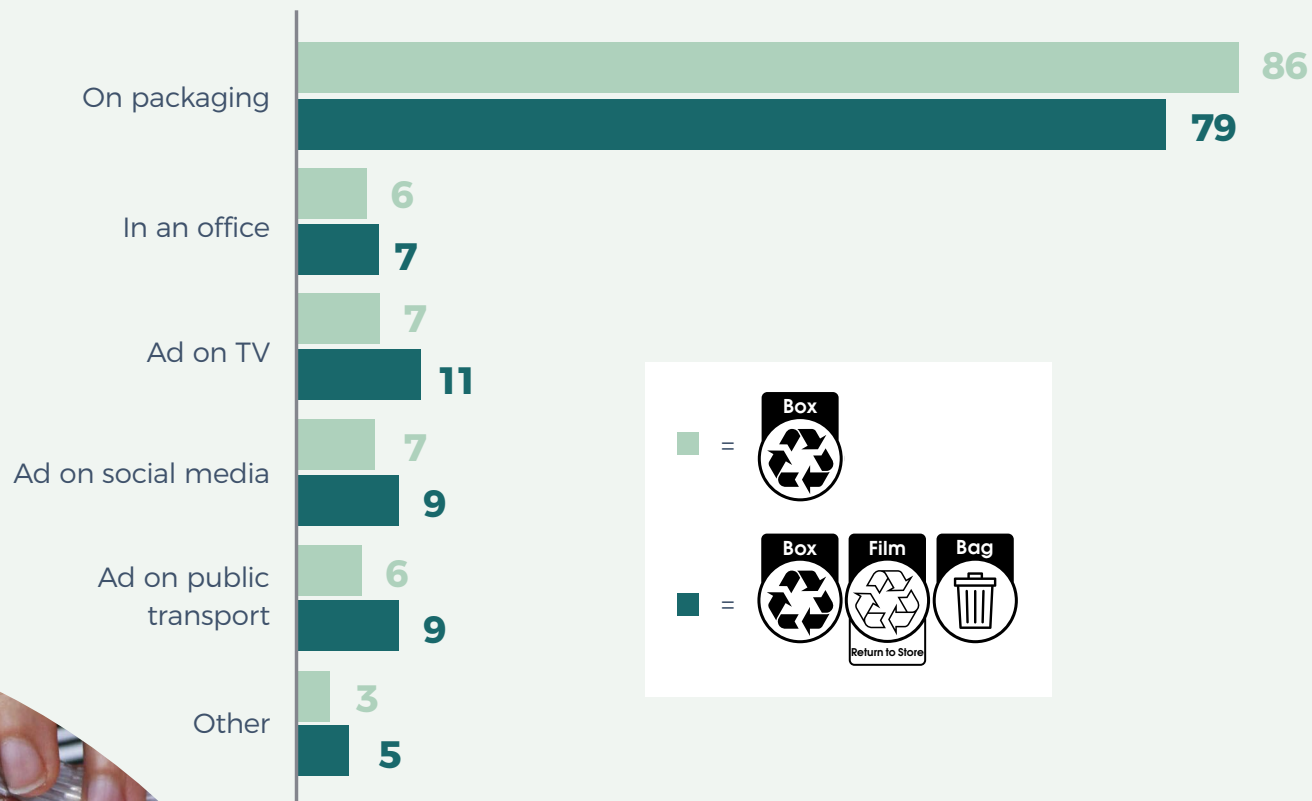
Insight 3.

Awareness of the ARL Program continues to grow.

Product packaging is also the most common place that most consumers remember seeing the label.



Where have consumers seen the ARL before? (%)



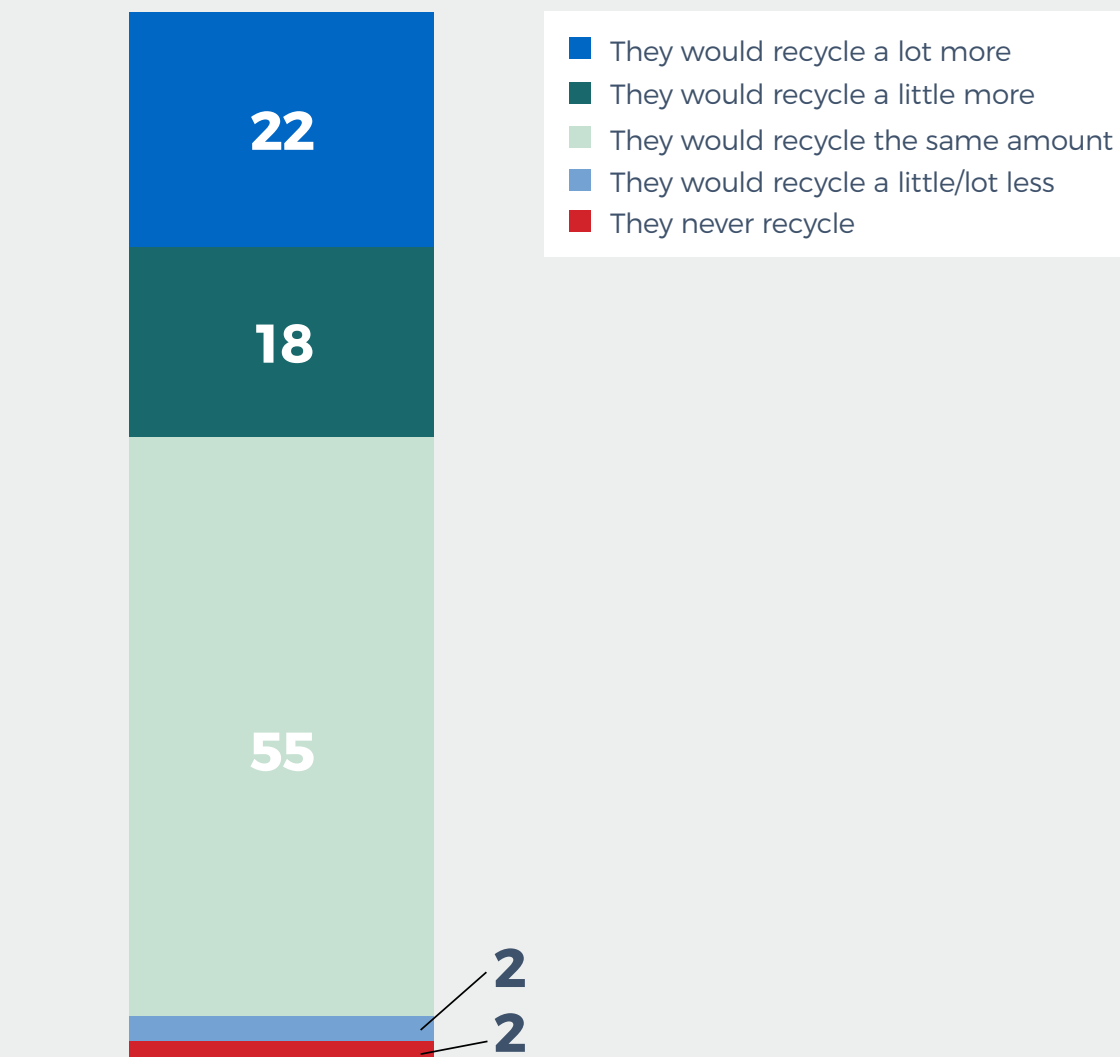


Insight 4.

Consumers value the ARL.

Consumers say the ARL helps them to recycle more – with 1 in 5 reporting they would recycle a lot more if the ARL was on their packaging.

If the ARL was on all packaging, how would it affect consumers' recycling habits? (%)





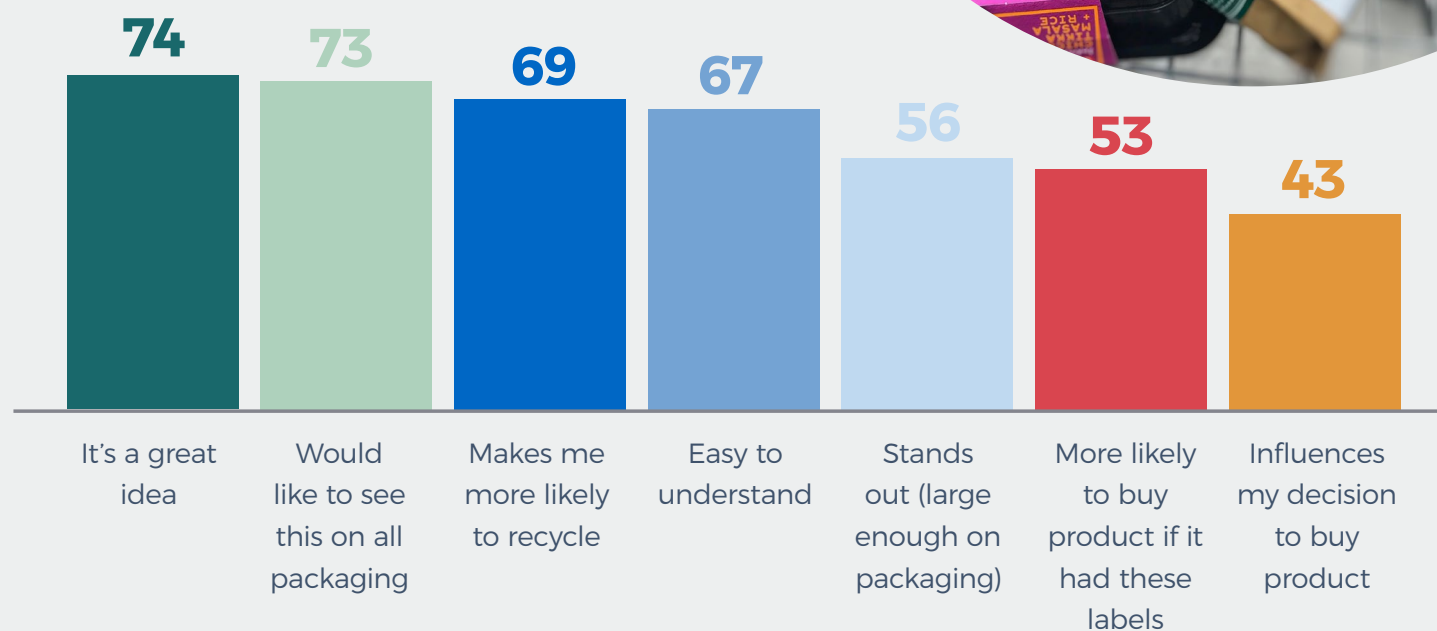
Insight 4.

Consumers value the ARL.

Three quarters of consumers agree that the ARL is a great idea, and would like to see it on all packaging.

Half of consumers are more likely to buy a product with the ARL on-pack, with two fifths noting it will influence their decision to buy a product.

What do consumers think of the ARL?





Insight 4.

Consumers value the ARL.

Even a non-recyclable label is considered a positive, with more than 60% of consumers agreeing that they appreciate a brand's transparency.

However, non-recyclable packaging is a real concern for consumers, with more than 60% saying they would be less likely to buy the product or would think less of the brand.

How do consumers feel about products displaying the 'bin' ARL logo (%)

Appreciate the brand's transparency

63

Require reassurance brand is working on recyclability

43

Less likely to buy the product

31

Think less of the brand

30



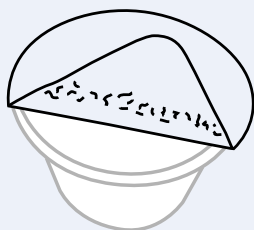


Insight 5.

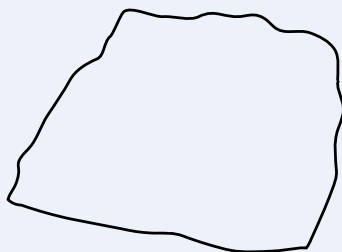
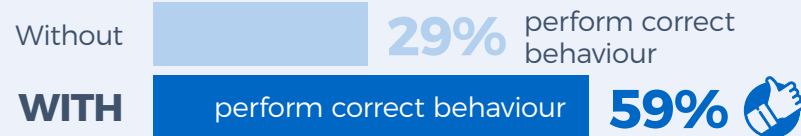
The ARL improves recycling behaviours.

The ARL helps consumers get the right packaging in the right bin. When tested on how to recycle seven common packaging materials and formats, the **ARL consistently improved consumer recycling behaviours.**

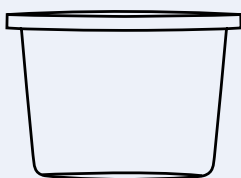
How does the ARL improve consumers' recycling behaviour?



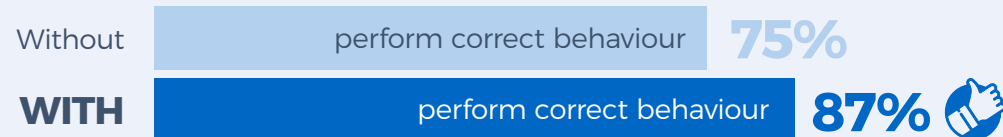
Aluminium foil lid - with and without the ARL



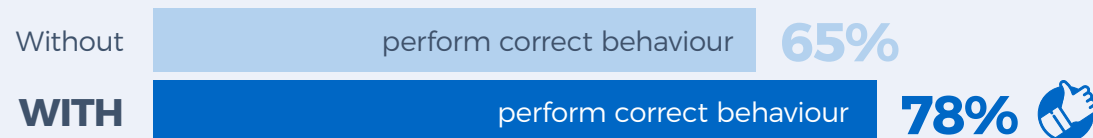
Soft plastic wrap - with and without the ARL



Rigid Plastic tub - with and without the ARL



Soft plastic film - with and without the ARL

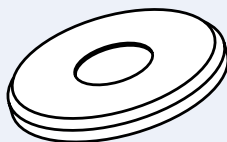




Insight 5.

The ARL improves recycling behaviours.

How does the ARL improve consumers' recycling behaviour?



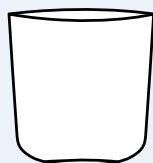
Rigid Plastic lid - with and without the ARL

Without

perform correct behaviour **74%**

WITH

perform correct behaviour **85%**



Plastic tub - with and without the ARL

Without

perform correct behaviour **77%**

WITH

perform correct behaviour **87%**



Cardboard tray - with and without the ARL

Without

perform correct behaviour **86%**

WITH

perform correct behaviour **90%**



WANT TO KNOW MORE?

The APCO and Planet Ark teams have a range of ARL resources available including our resource tool kits specifically designed for key stakeholders:

Tool Kit for Community Groups

<https://recyclingnearyou.com.au/documents/doc-1987-planetark-toolkitngoscommunitygroups-check-it.pdf>

Tool Kit for Educators

<https://recyclingnearyou.com.au/documents/doc-1986-planetark-toolkiteducators-check-it.pdf>

Tool Kit for Government

<http://documents.packagingcovenant.org.au/public-documents/ARL%20Resource%20Tool%20Kit%20for%20Government>

Tool Kit for Industry

<http://documents.packagingcovenant.org.au/public-documents/ARL%20Resource%20Tool%20Kit%20for%20Industry>

Tool Kit for Local Governments

<https://recyclingnearyou.com.au/documents/doc-1984-planet-ark-toolkitlocal-government-check-it.pdf>

Tool Kit for Packaging Manufacturers

<http://documents.packagingcovenant.org.au/publicdocuments/ARL%20Resource%20Tool%20Kit%20for%20Packaging%20>

Tool Kit for Partners

<http://documents.packagingcovenant.org.au/public-documents/ARL%20Resource%20Tool%20Kit%20for%20Partners>

Tool Kit for Waste and Recycling Industry

<http://documents.packagingcovenant.org.au/public-documents/ARL%20Resource%20Tool%20Kit%20for%20Waste%20and%20Recycling%20Industry>

Tool Kit for Waste Groups

<https://recyclingnearyou.com.au/documents/doc-1988-planetark-toolkitwastegroup-check-it.pdf>

To find out more about joining the ARL Program, visit:



Resources available exclusively for ARL Program Members:

APCO Members participating in the ARL Program receive access to a range of exclusive tools and resources, including case studies, reports, online learning modules, webinars and much more.

FURTHER INFORMATION



www.arl.org.au

www.apco.org.au

