

Survey on Plastic Bottle Recycling

Public Attitudes and Behaviours

January 2020

Commissioned by the Single-Use Beverage Packaging Working Group
Designed and executed by Hong Kong Public Opinion Research Institute (PORI)
based on initial analysis by Wealth of Flows Consulting Ltd

Methodology

- **Survey period:** 27 December 2019 – 22 January 2020
- **Valid sample size** (completed interviews): 1,001
- **Effective response rate:** 71.1% (i.e., ~1400 calls were made in total)
- **Survey method:** Random telephone survey conducted by real interviewers, on landline and mobile
- **Target population:** Cantonese-speaking residents in Hong Kong of age 18 or above; balanced demographics in terms of age, gender, income

Section 1

Summary of Findings

Location matters

- About half of Hong Kong's drinks in plastic bottles are consumed on the go; sports/ leisure, work, and home are nevertheless important locations too.
- Over half of respondents would like return solutions near their homes, while 25% of respondents looks for return options while on the go.
- Respondents with strong recycling habits are already familiar with public and private three-bin systems. Each were mentioned by over 60% of strong participants.

Convenience and trust matter

- Convenience and trust are key drivers for recycling participation.
 - ~60% of “non-participants” mention lacking collection points as a key reason.
 - One fifth of non-participating respondents do not believe returned bottles are recycled.
- Hong Kong consumers return recyclables in small volumes – 90% of respondents do not accumulate more than 10 bottles at a time.
- Over half of Hongkongers would return bottles at a self-operated machine. Shops and refuse collection centers are seen as good return points by ~40 and ~30 percent of respondents, respectively.

Financial rewards trigger return behaviour

- Over half of respondents claim they recycle all or the majority of their disposable plastic bottles.
- 41% of participants would recycle without any reward.
- A 5 cents award would trigger a sizable increase in participation rates (a third of those currently not or barely returning bottles). Larger awards help but have relatively less impact.
- Electronic cash rewards are preferred over discount schemes.

Lack of confidence in the recycling system and recycling outcomes is a key concern.

This is good news since it can be addressed without capital-intensive infrastructure or high Value on Return payouts.

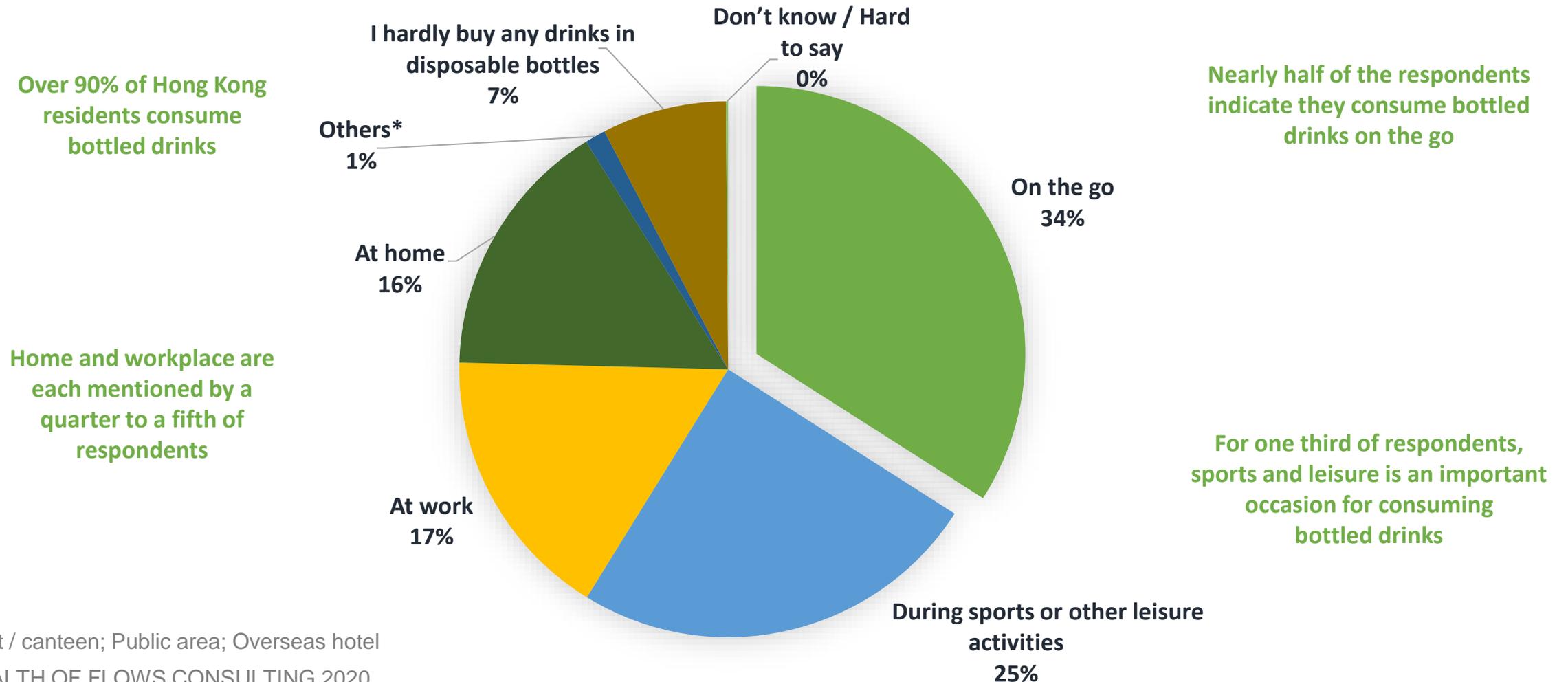
Key is a well-designed return network to deliver sufficient convenience.

Section 2

Detailed Results

[Q1] When you buy a drink in a disposable plastic bottle, where do you usually consume it?

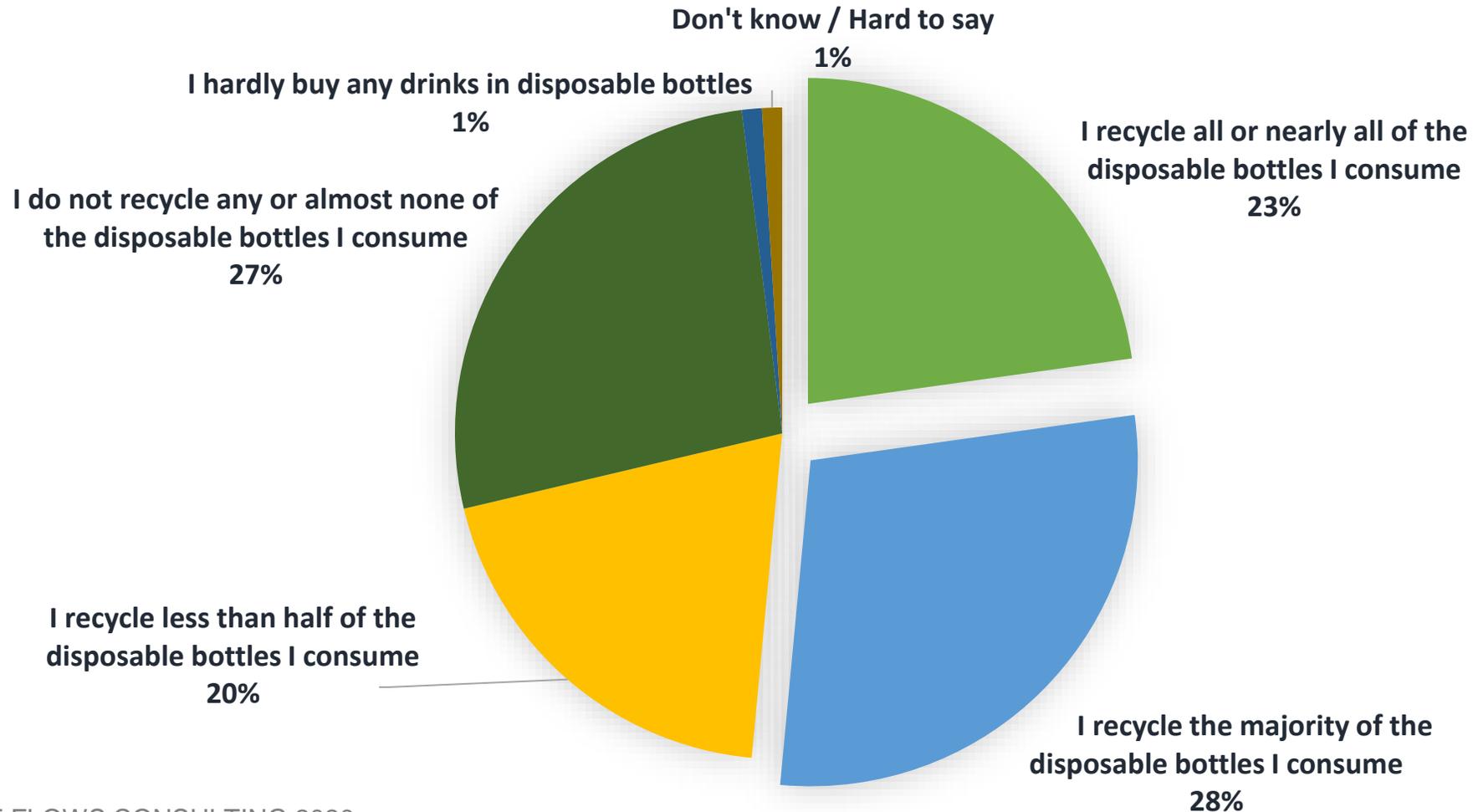
Multiple answers allowed (total responses: 1415)



* Restaurant / canteen; Public area; Overseas hotel

[Q2] When you buy a drink in a disposable plastic bottle, what do you do with the empty bottle?

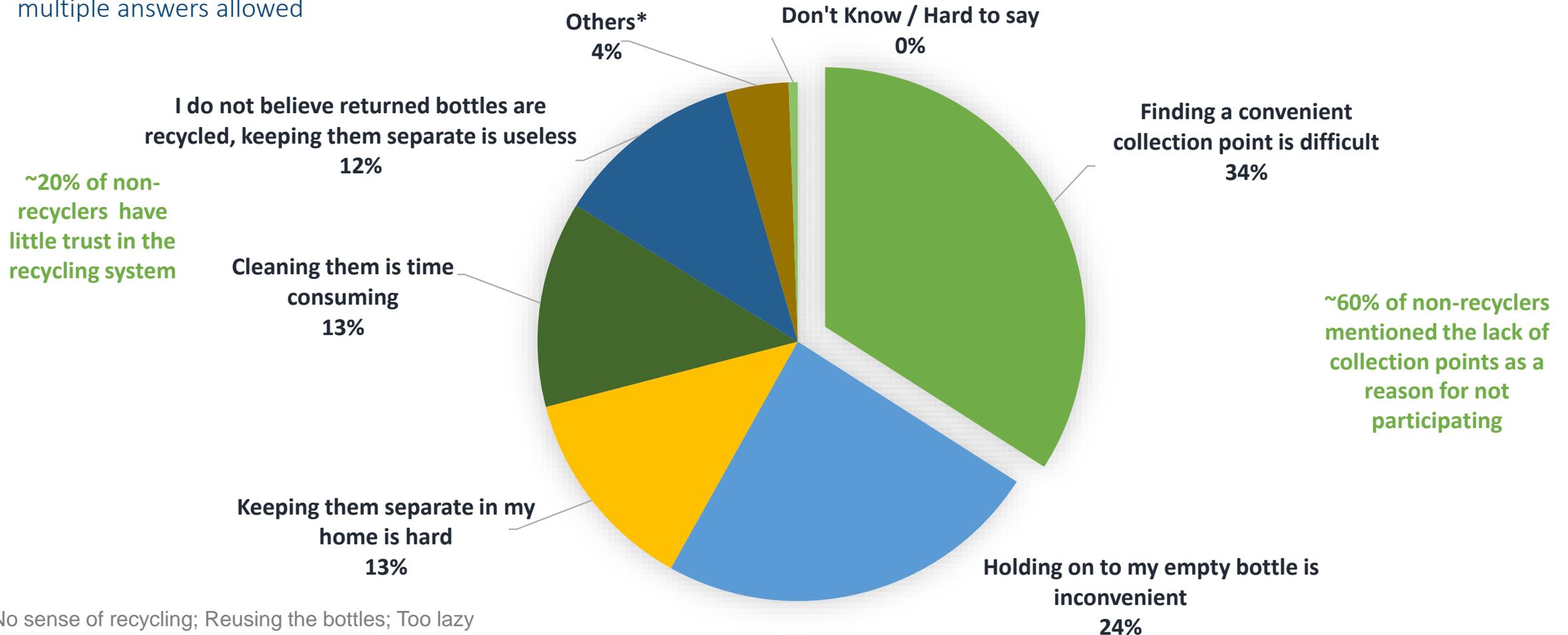
Excluding those who replied "I hardly buy any drinks in disposable bottles" in Q1 (base = 895)



Over half of respondents *claim* they recycle all or most of their bottles

[Q3] Why do you rarely or never recycle your plastic bottles?

Only for those who replied “less than half” or “not any/almost none” in Q2 (base = 420); multiple answers allowed

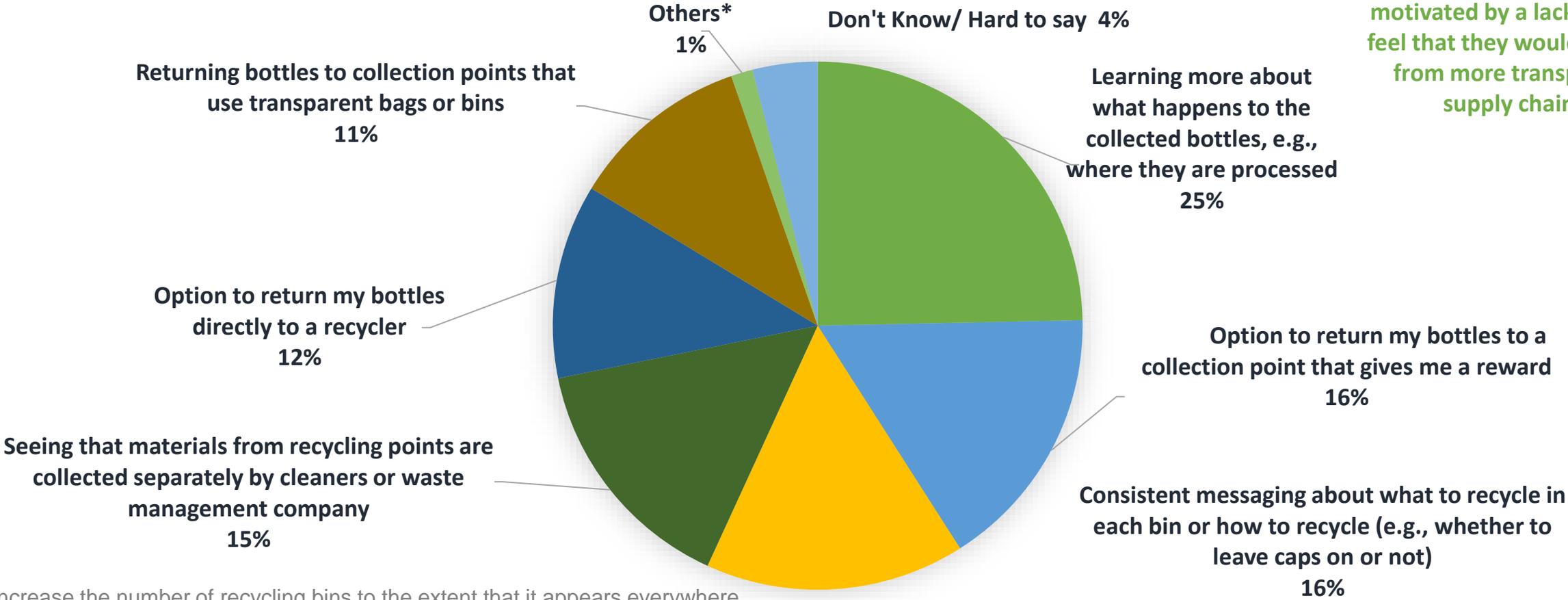


* No sense of recycling; Reusing the bottles; Too lazy

[Q4] What would give you more confidence that your recycling efforts make a difference?

Only for those who responded “I do not believe returned bottles are recycled, keeping them separate is useless” in Q3 (base = 87); multiple answers allowed

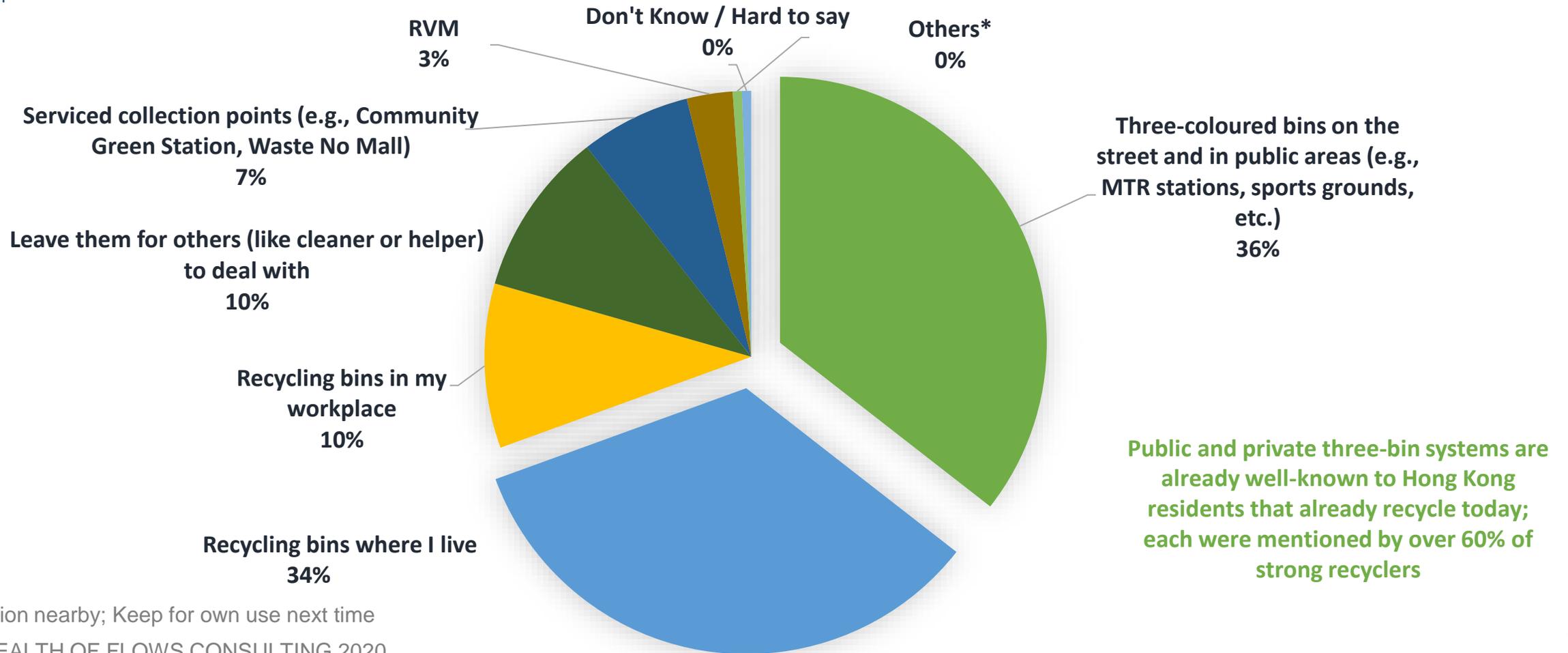
Over half of non-recyclers motivated by a lack of trust feel that they would benefit from more transparent supply chains



* Increase the number of recycling bins to the extent that it appears everywhere

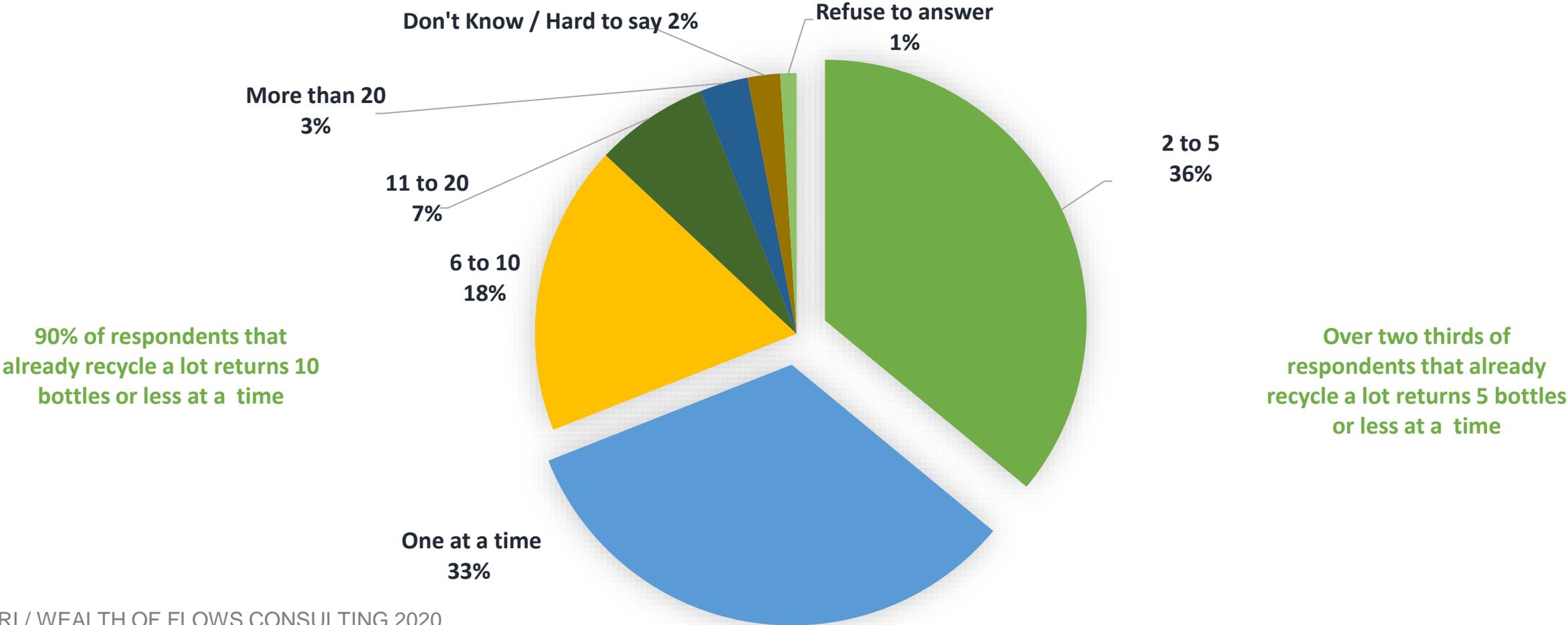
[Q5] Where do you usually take the plastic bottles for recycling?

Only for those who responded “all or nearly all” or “the majority” in Q2 (base = 462);
multiple answers allowed



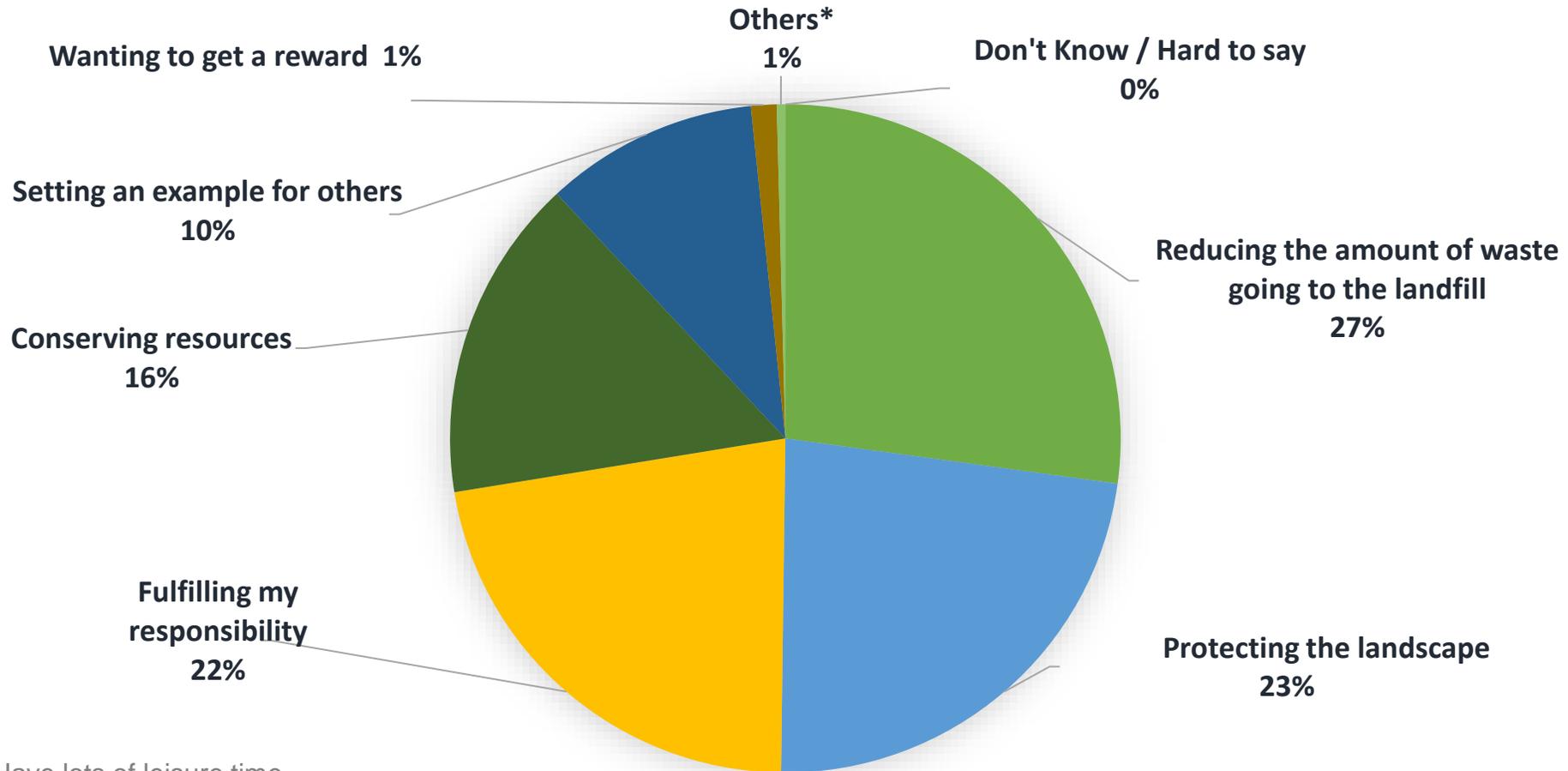
[Q6] How many empty bottles do you typically save up before you return them for recycling?

Only for those who responded “all or nearly all” or “the majority” in Q2 (base = 462)



[Q7] What is your strongest motivation for returning a plastic bottle to a collection point?

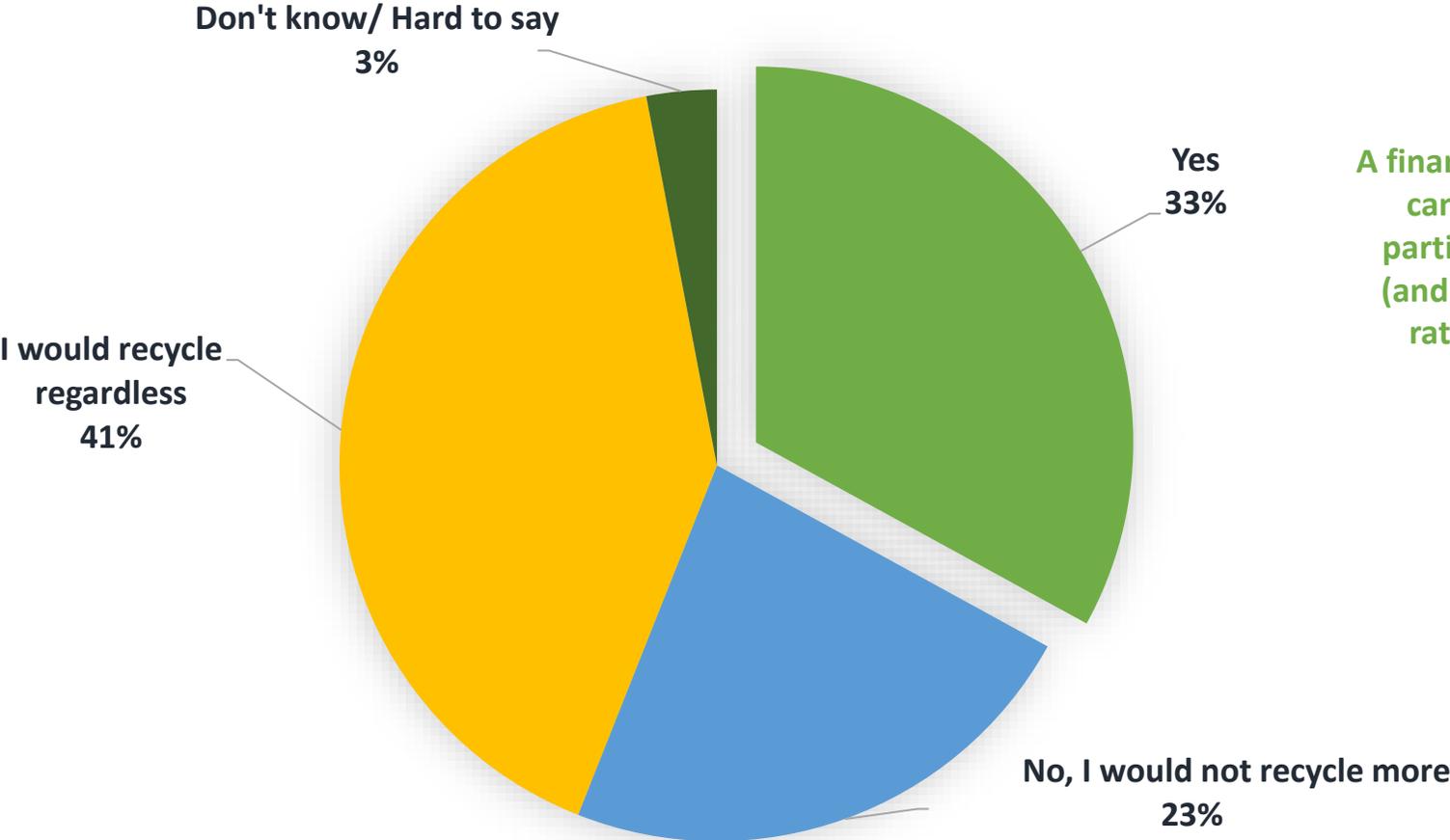
Only for those who responded “all or nearly all” or “the majority” in Q2 (base = 462);
multiple answers allowed



* Just want to recycle; Have lots of leisure time

[Q8] Would you recycle more if you would get a 5 cent reward for each bottle you return?

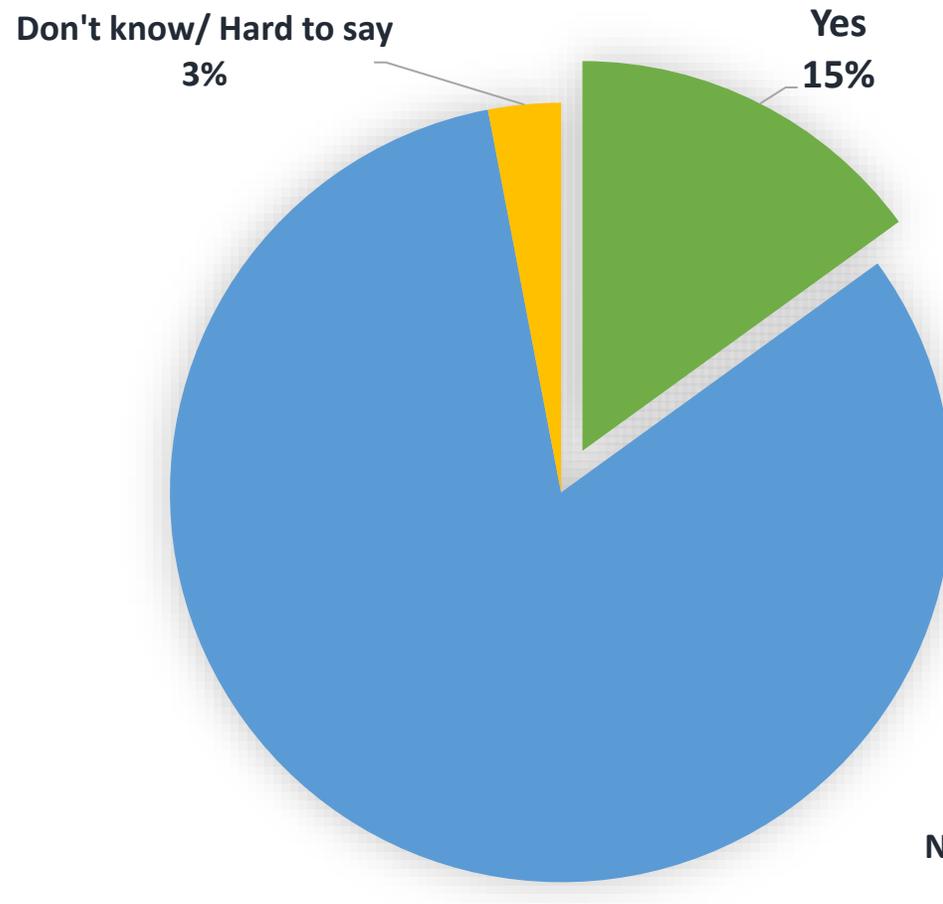
Asked of all respondents, including those who already participate



A financial reward, even if small, can motivate a lot of non-participants into participants (and maybe also increase the rate of those that already participate; tbc)

[Q9] Would you recycle more if you would get a 10 cent reward for each bottle you return?

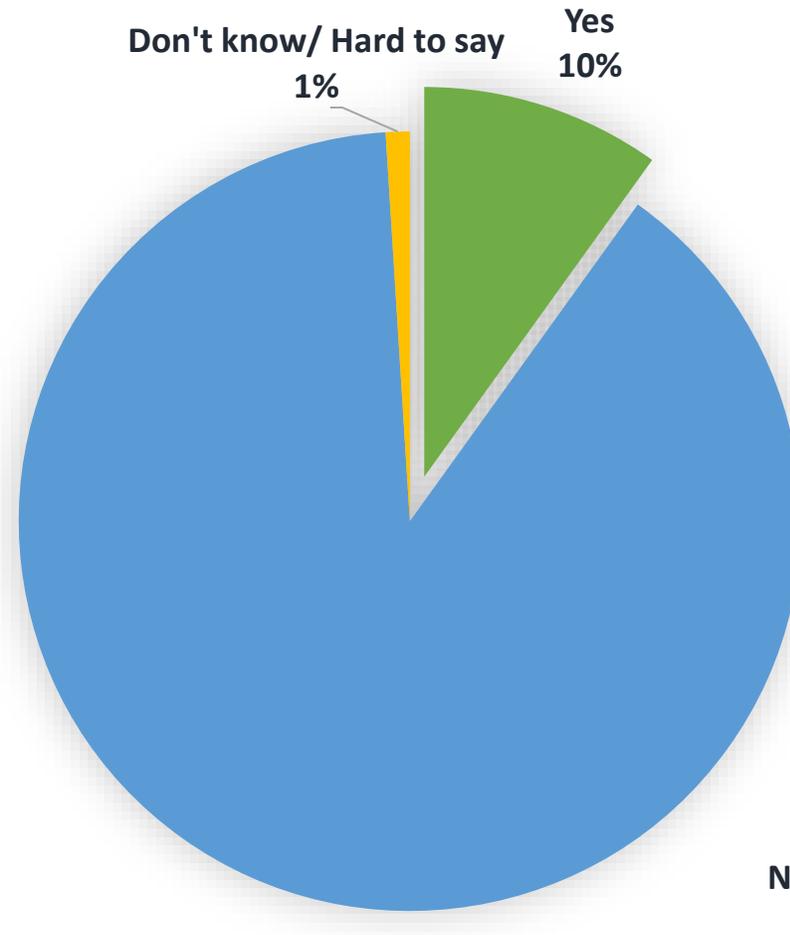
Only for those who responded “No, I would not recycle more” in Q8 (base = 230)



The incremental benefit of slightly increasing the reward is marginal

[Q10] Would you recycle more if you would get a 20 cent reward for each bottle you return?

Only for those who responded “No, I would not recycle more” in Q9 (base = 188)

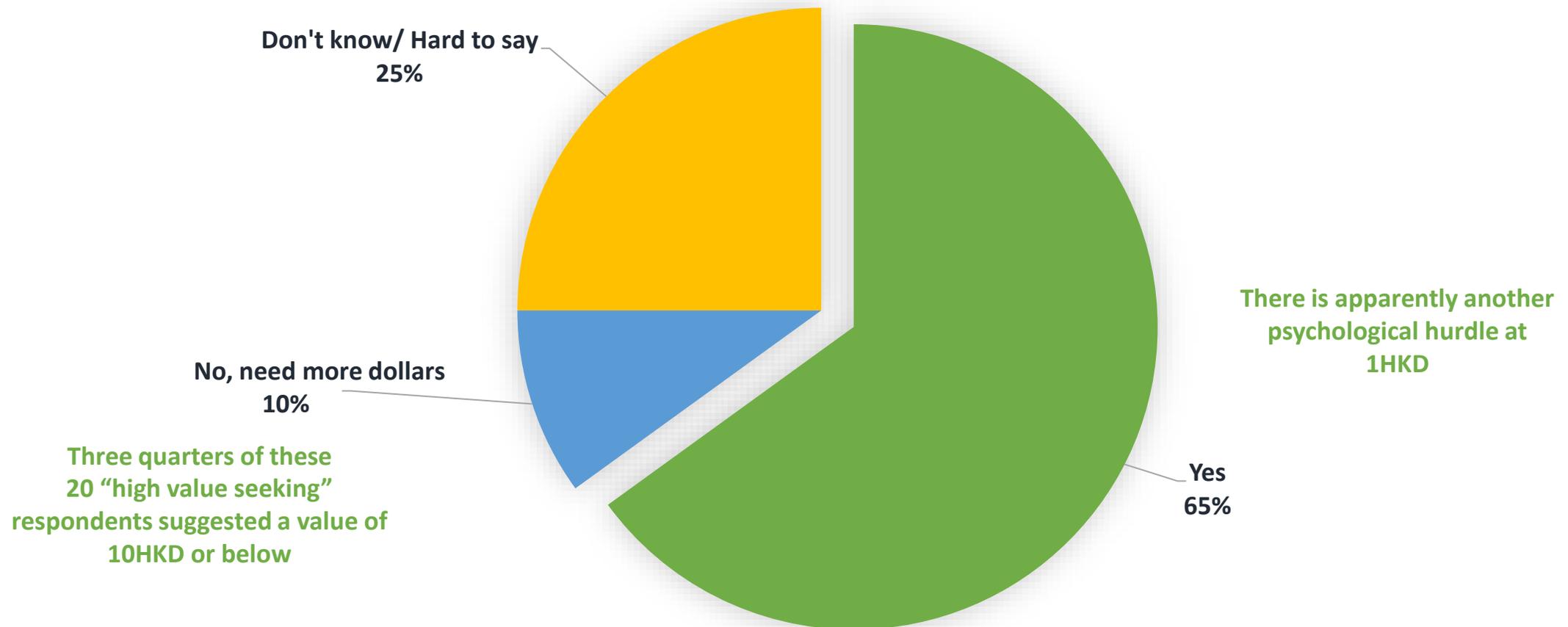


The incremental benefit of slightly increasing the reward is marginal

No, I would not recycle more
89%

[Q11] Would you recycle more if you would get a 1 dollar reward for each bottle you return?

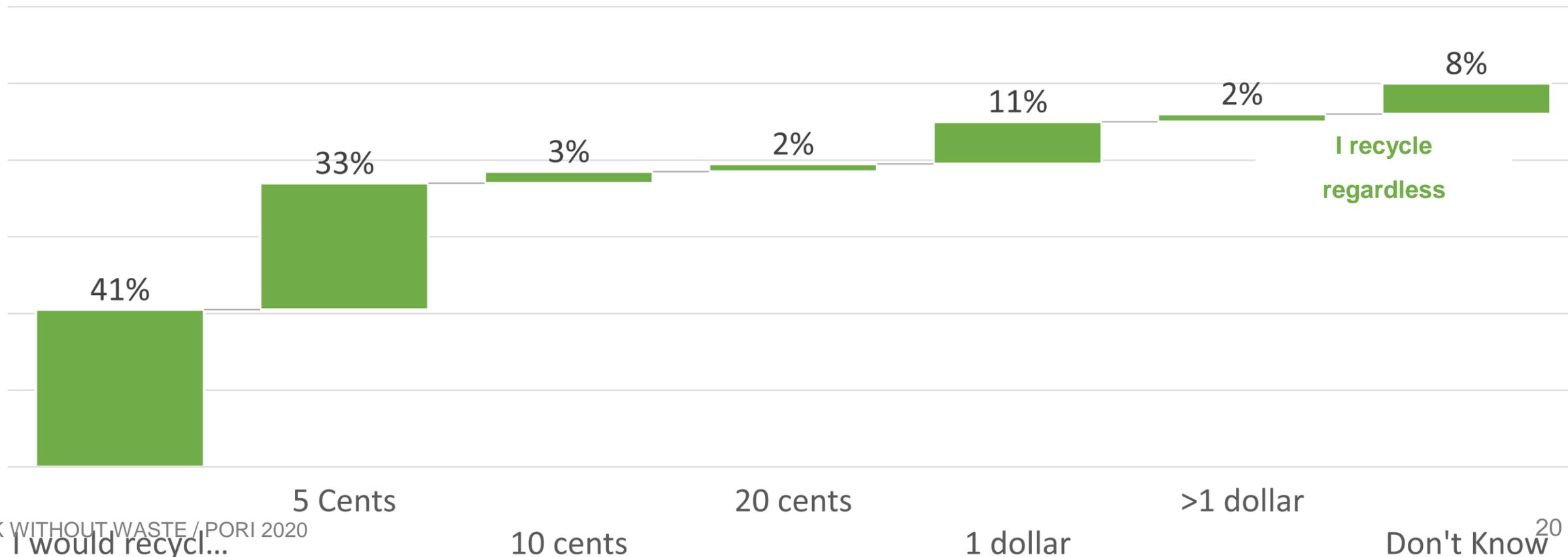
Only for those who responded “No, I would not recycle more” in Q10 (base = 170)



[Q8-11] Summarizing the incentives: incremental benefit of incentives

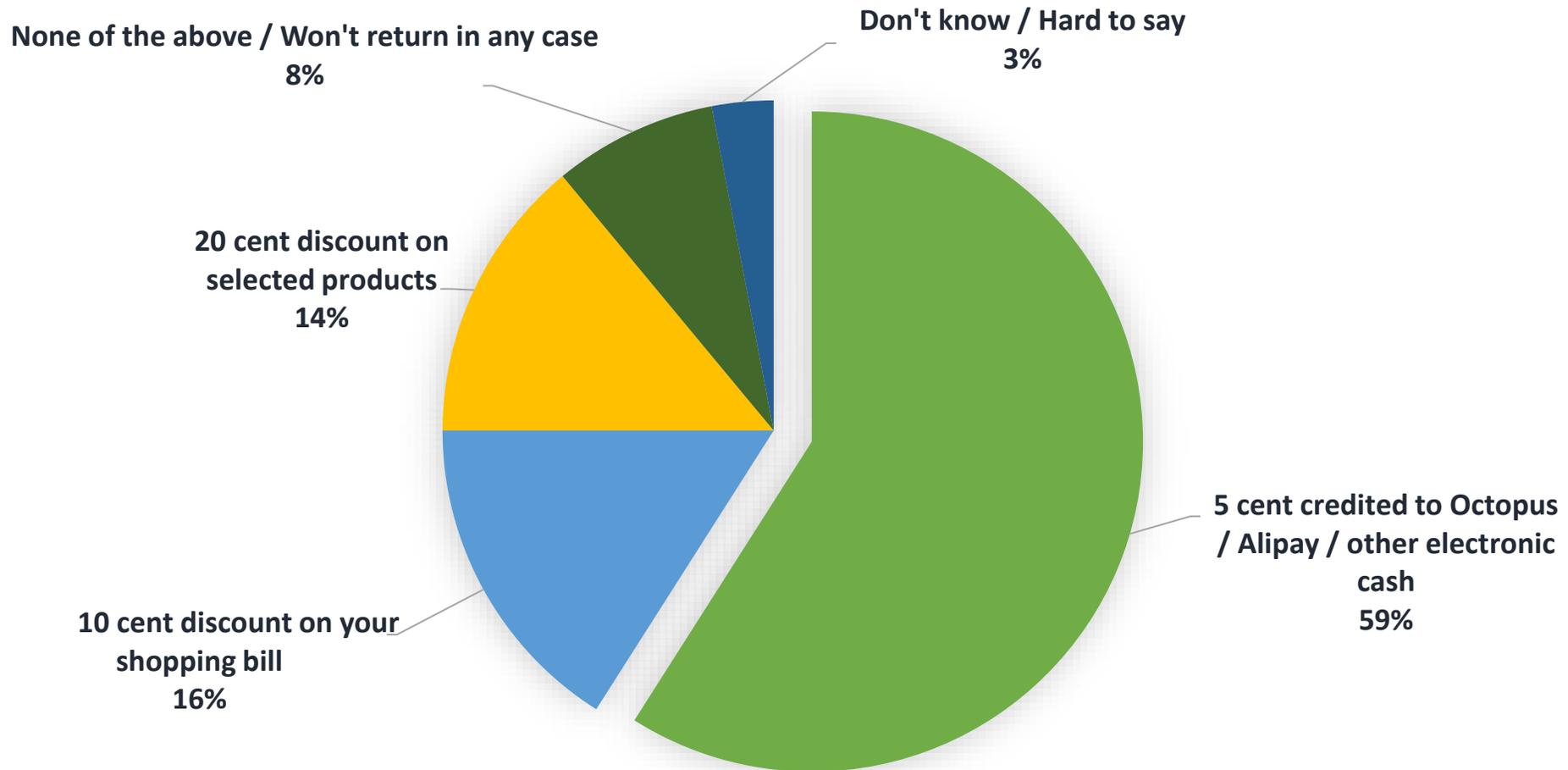
“Would you recycle more if you would get a ... HKD reward for each bottle you return?”

Share of total respondents



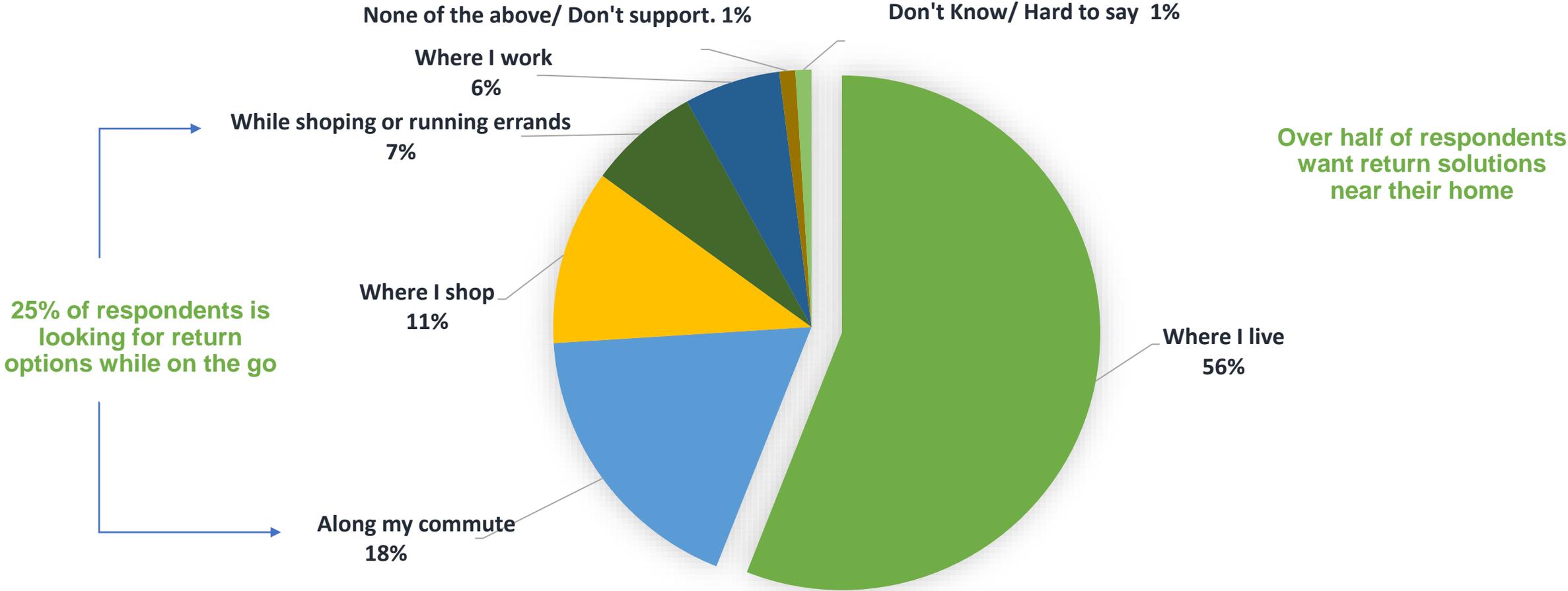
[Q12] Assuming you have a choice as to where you return your bottles in the future, which option would you choose?

Only one answer allowed



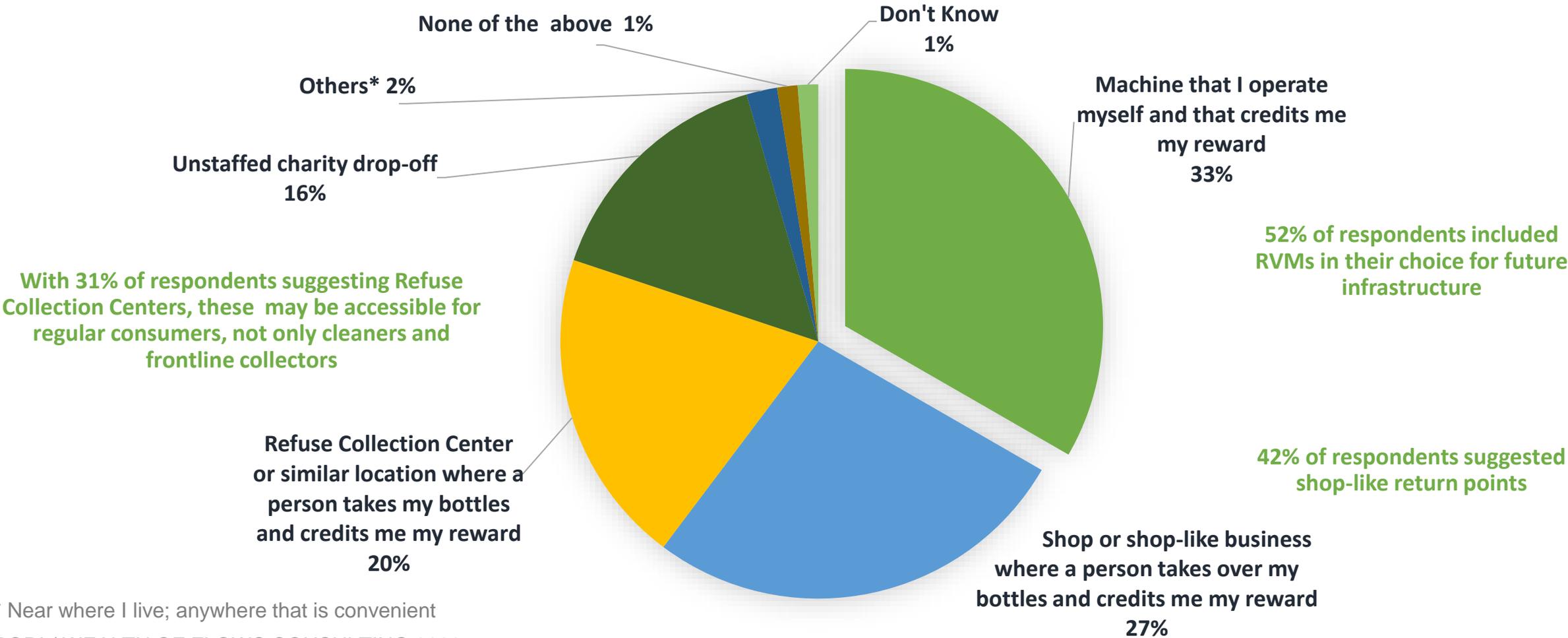
[Q13] Which of the following locations would you consider most convenient to return your bottles?

Answers were read out in randomized order; only one answer allowed



[Q14] At what kind of drop-off point would you prefer to return your bottles in the future, all else being equal?

Multiple answers allowed (1566 responses)



* Near where I live; anywhere that is convenient

Summary of findings

- **Convenience – in terms of location and hassle – matters**
- **Trust matters**
- **Financial rewards trigger return behaviour - even when values are low**
- **Cash rules**

About Drink Without Waste

The Single Use Beverage Packaging Working Group (SUBP WG) is a coalition of beverage manufacturers and importers, waste handlers and recyclers, institutions, retailers and NGOs in Hong Kong. The Working Group's *Drink Without Waste* initiative seeks to reduce the volume of used beverage packaging going to waste by 70 to 90% in 2025.

About HKPORI

The Hong Kong Public Opinion Research Institute Limited (HKPORI) is a direct continuation of the Public Opinion Programme (POP) of The University of Hong Kong (HKU). As a civic society conscientious enterprise HKPORI provides quality survey services to a wide range of public and private organizations.

About Wealth of Flows Consulting Ltd

Wealth of Flows Consulting is a Hong Kong based consultancy specialized in circular economy, solid waste policy, and environmental strategy. The firm has a strong pedigree in international strategic management consulting, circular economy thought leadership, and turning business and environmental interests into a joint pursuit. Its team is dedicated to helping organisations find the straightest path towards circular models.