

Behavioural Trend Monitoring Survey

Presentation of survey results by the Waste and Resource Efficiency Behavioural Insights team, with research conducted by AK Research and Consulting

This webinar will start at 12:00

Karakia

Tuia i runga

Let us connect to the heavens above

Tuia i raro,

Let us connect to the earth below

Tuia i roto,

Let us connect within

Tuia i waho

Let us connect externally

Tuia i te here tangata

Let us connect to the essence of humanity

Ka rongo te pō

Exploring the unknown (night) connection

Ka rongo te ao

Realising the potential (day) of connection

Haumi....e,

Uniting as one

Hui....e

Uniting

Tāiki e!

Agenda

1. Introduction
2. Objectives and methodology
3. Key Findings
4. Reduce, Reuse, Recycle
5. Plastics
6. Focus on Food Waste
7. Online dashboard
8. Q&A

Objectives and Methodology

The Ministry's Behavioural Insights team has commissioned an annual Behavioural Trend Monitoring Survey for the next three years.

The main objective of this research is to **understand and track changes in people's attitudes, awareness and behaviours around waste minimisation.**

This research will also:

- Support policy implementation on waste,
- Track changes in practices from policies like the plastics phase out and kerbside standardisation,
- Evaluate the impact of food waste reduction programmes

This webinar presents results from the 2023 Behavioural Trend Monitoring Survey, and where relevant the data will be compared with data from previous research.

The comparisons are meant to show trends, and differences between data sets are not necessarily statistically significant. Arrows will show relevant trends in these differences.

The 2023 report: technical details

- Research done by AK Research and Consulting
- Nationally representative online sample of n=1017 adults 18 years and over
- Conducted between 9th and 16th May 2023.
- The margin of error is $\pm 3.1\%$.

Key findings



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Key findings

Reduce, Reuse, Recycle

- **Most frequent behaviours:**
 1. BYO bags (81%)
 2. Recycle at home (72%)
 3. Carry a reusable bottle (58%)
- **People find recycling easier (71%) and less confusing (37%)** when compared with previous research
- For most, it is worth taking the time to recycle right (83%)
- However, they **are less confident about what happens to their recycling**
- When asked about what can and can't be recycled, **most people get most recyclable items right, but they are still putting non-recyclables in the recycling bin**
- Non-recyclable items often put in the recycling are juice cartons (50%), coffee cups (46%), aerosol cans (32%) and compostable packaging (32%)
- **People are recycling through separate drop-off locations**, specifically e-waste (46%), followed by paint (28%) and soft plastics (24%)
- **The impact of rubbish in the environment and reducing waste is an important issue for most (>80%),** but it is less important to reduce GHG emissions (63%)

General insights

- Comparing results with previous research shows many improvements in waste reduction and recycling
- People are more likely to think others are doing less of a desirable waste behaviour and more of an undesirable behaviour than themselves

Plastics

- **The biggest barrier to reducing plastic waste is finding alternatives (40%),** followed by the affordability of alternatives (33%)
- 30% of people use single-use produce bags provided at stores, 22% put produce straight into the trolley and 19% in reusable produce bags
- Most people **find information about how to dispose of plastic waste in the products' labelling or packaging (63%),** or in their local council's website (42%)

Food Waste

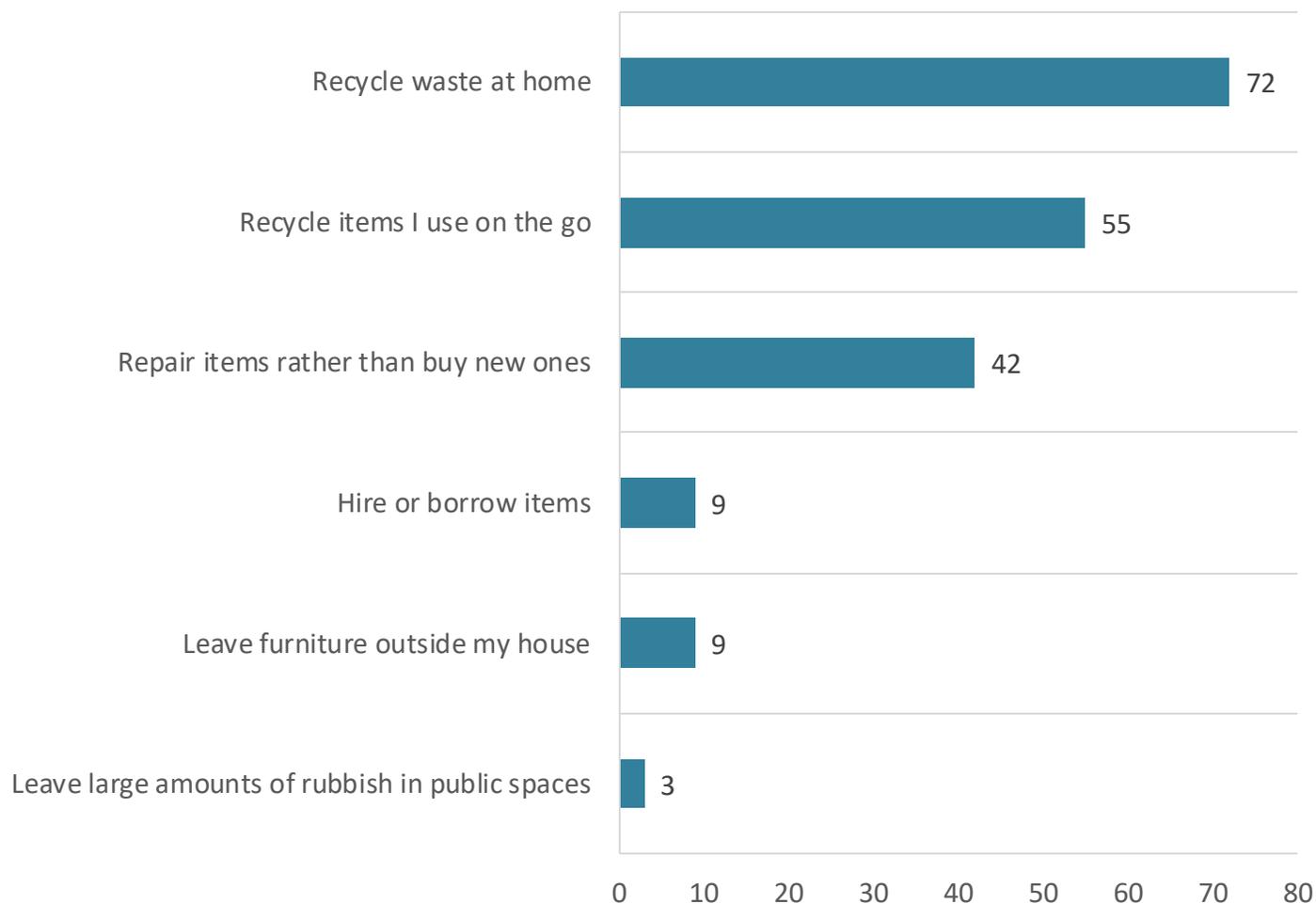
- **Most frequent food waste behaviours:**
 1. Using a shopping list (62%)
 2. Eating leftovers (57%)
 3. Thinking about portion size (56%)
- **Wasting food feels wrong to most people (88%),** though the link between food waste and the environment is not always clear (55%)
- **Most people believe that they don't waste much food**
- Leftovers not being eaten or reused (37%) is the main reason people are wasting food, followed by food going off (19%)
- **Motivations to reduce food waste:**
 1. Saving money (89%)
 2. Managing their homes more efficiently (82%)
 3. Valuing the effort to produce food (80%)

Reduce, Reuse, Recycle



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Frequency of waste minimisation behaviours



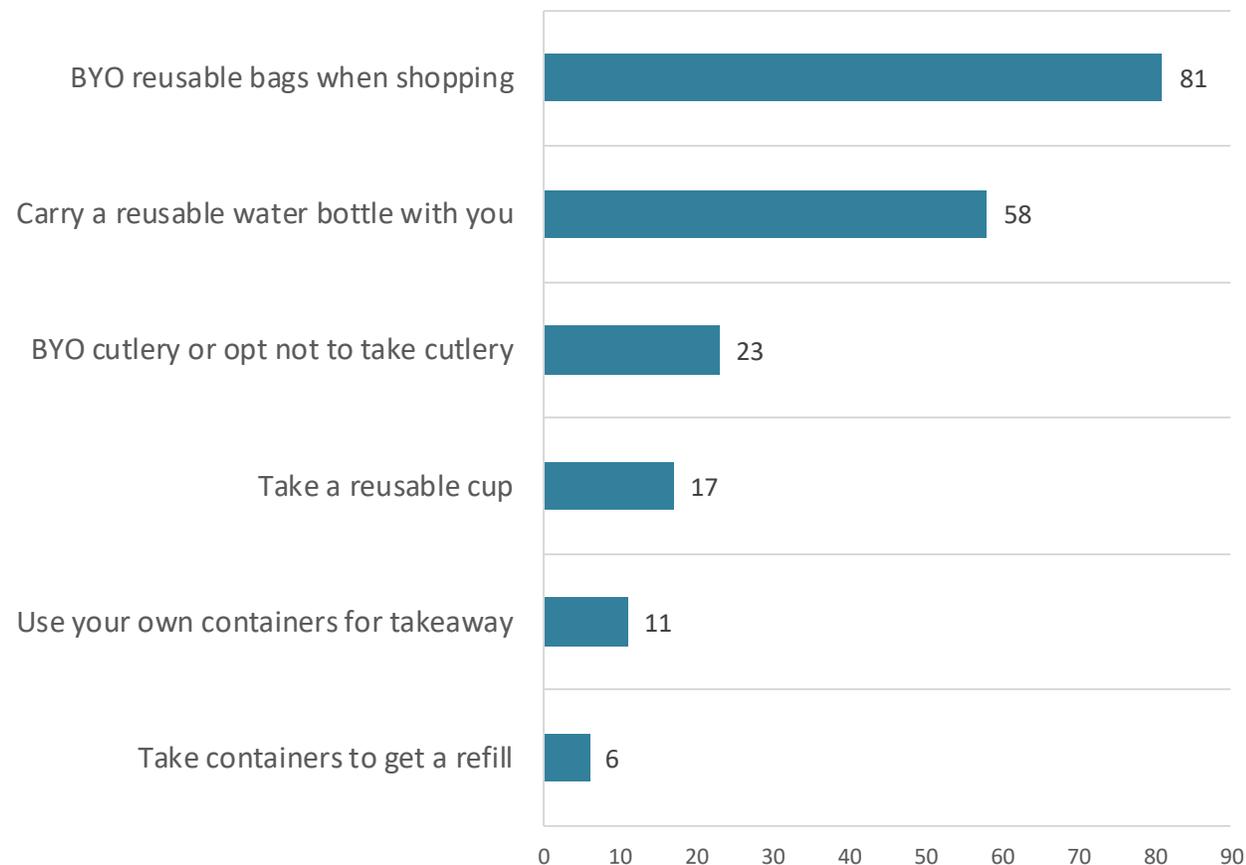
Survey respondents were asked how often they do a variety of waste minimisation behaviours. The results shown are the percentage of people responding “always” or “very often”.

This slide presents behaviours related to **recycling, reducing waste and illegal dumping**.

Recycling at home (72%), on the go (55%) and repairing items (42%) received the highest responses.

Q: How often do you do each of the following? (% always + very often)

Frequency of waste minimisation behaviours



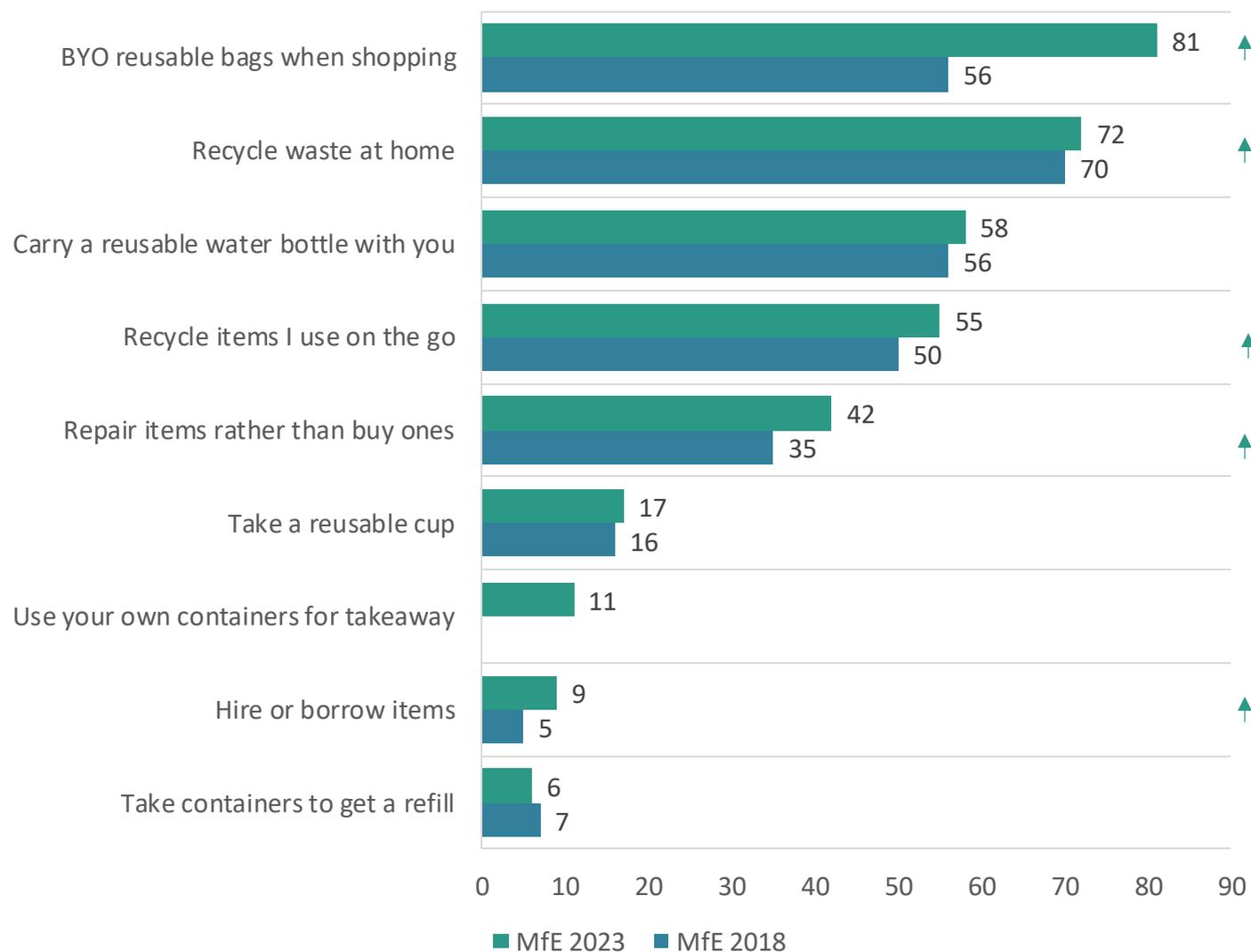
This slide presents behaviours related to reusing, specifically **bringing your own items**.

Bringing your own bags when shopping is the most frequent behaviour, with 81% of people saying they do it always or very often.

Carrying a reusable water bottle comes next (58%), while other reuse behaviours are done to a lesser degree (BYO cutlery or reusable cups).

Note: the responses for BYO cups and containers include using a reusable cup scheme.

Frequency of waste minimisation behaviours



For 9 of the 12 behaviours presented, we were able to compare results with research undertaken by MfE in 2018.

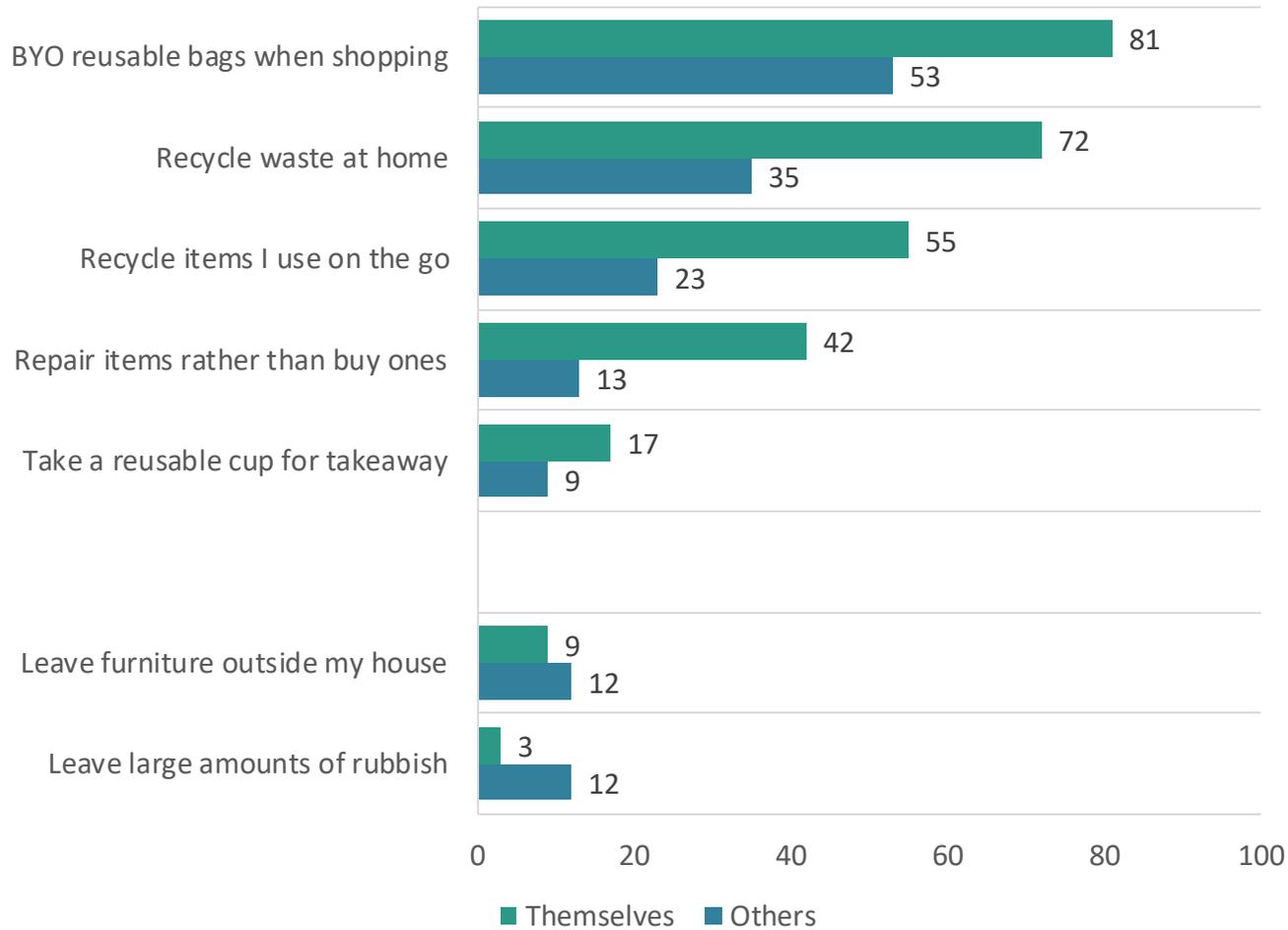
All results are percentages of people responding “always” or “often”, or that they do them in general.

In most cases, upwards trends can be seen. Arrows in the graph show these trends.

The most frequently reported behaviour is bringing your own reusable bags when shopping. This has **increased from 56% to 81%** between 2018 and 2023.

These findings reflect the implementation of the single-use plastic bag ban which came into place in July 2019.

What people think others do

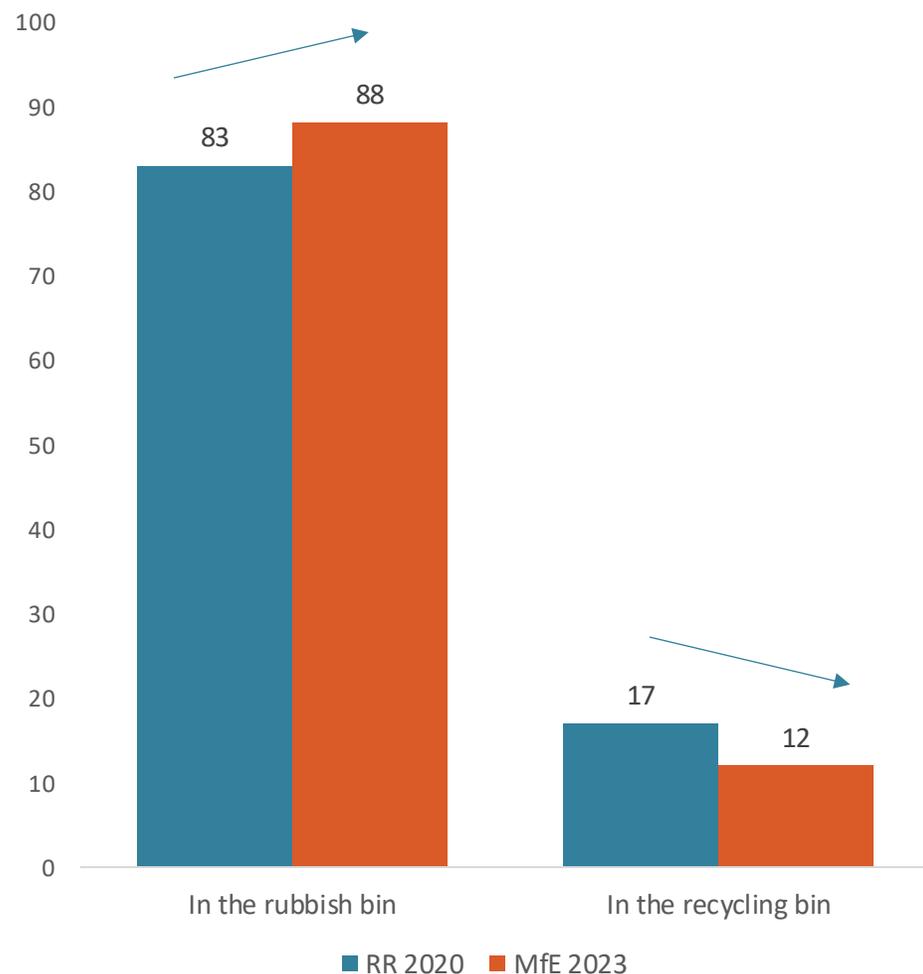


For some behaviours, we introduced an additional question to test what people think others are doing, ie, what they think is the social norm.

The results show that people are more likely to think that others are **doing less of a desirable behaviour and more of an undesirable behaviour** than themselves, rating themselves higher than others.

Q1: How often do you do each of the following? (%) green
Q2: How often do you think OTHERS do the following? (%) blue

If unsure whether an item can be recycled or not



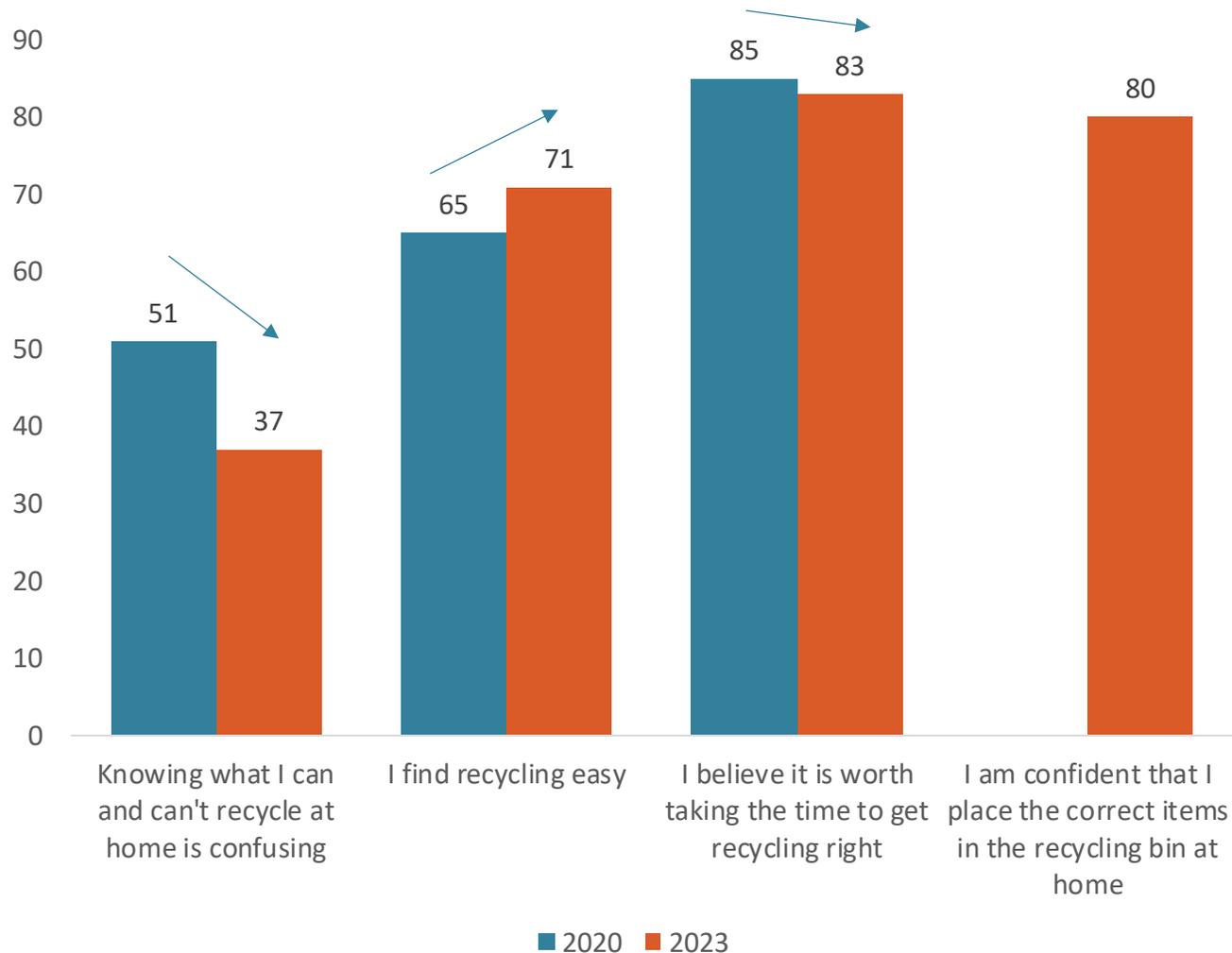
The 2020 Rethinking Rubbish survey from WasteMINZ asked people what they would typically do when disposing of an item if they were unsure whether it can be recycled or not.

We tested that question again in 2023 and found that the percentage of people putting items they were unsure of in the rubbish bin has **increased from 83% to 88%**.

This is a positive trend:

“When in doubt, throw it out”

Beliefs and attitudes on how to recycle



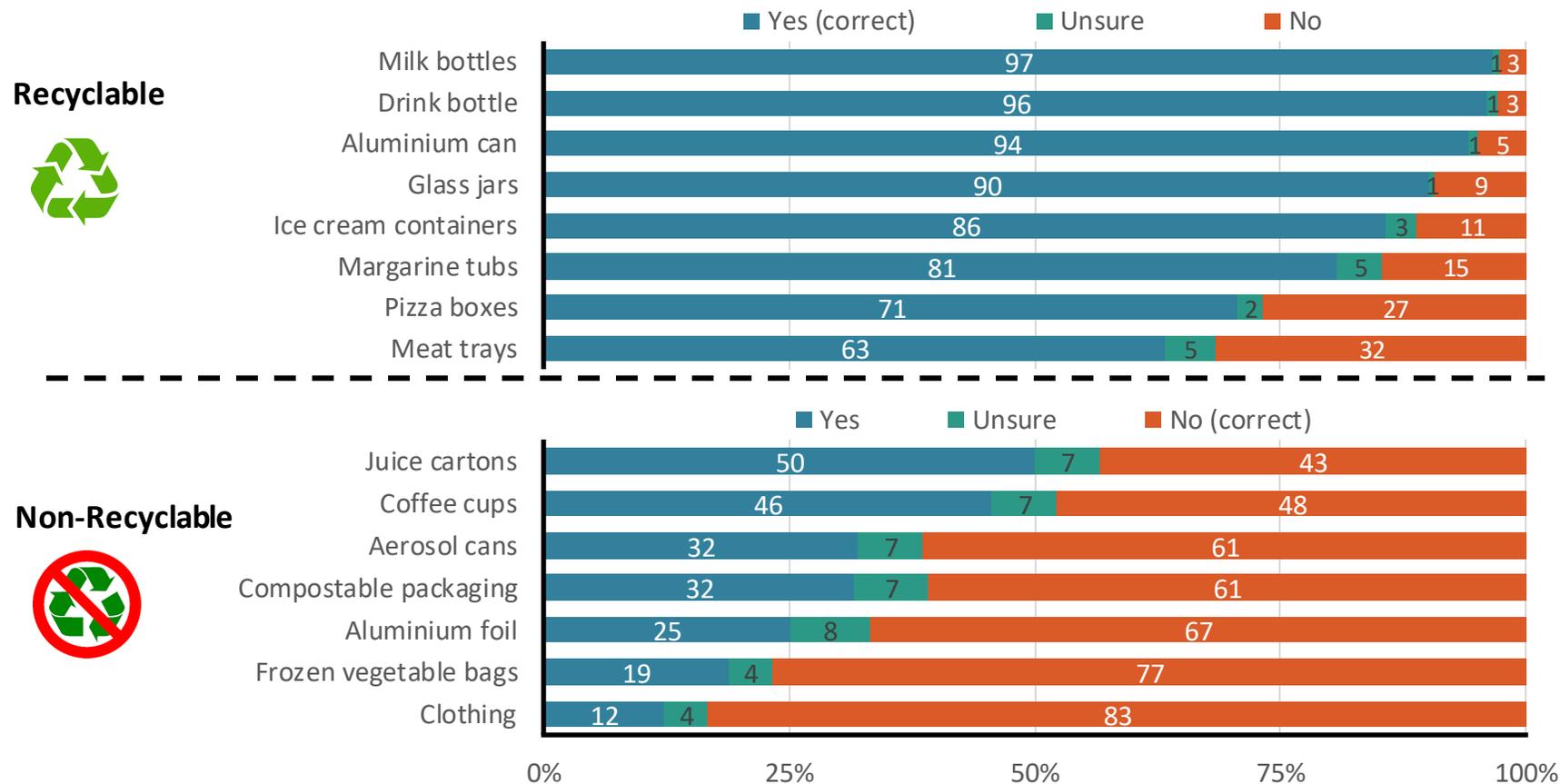
Since 2020, people seem to **find recycling easier and less confusing**. It is also important to note that the majority of people believe it is worth taking the time to do it right and are confident that they place the right items in the bin at home.

These results show a positive outlook about people's attitudes and beliefs about how to recycle.

Knowledge of what can and can't be recycled

When asked about what items they would typically put in the recycling, people got most of the recyclable items right. But they also put a large number of non-recyclable items in their recycling.

The chart below shows the results for the 2023 survey, and 2020 data is on the tables to the right.



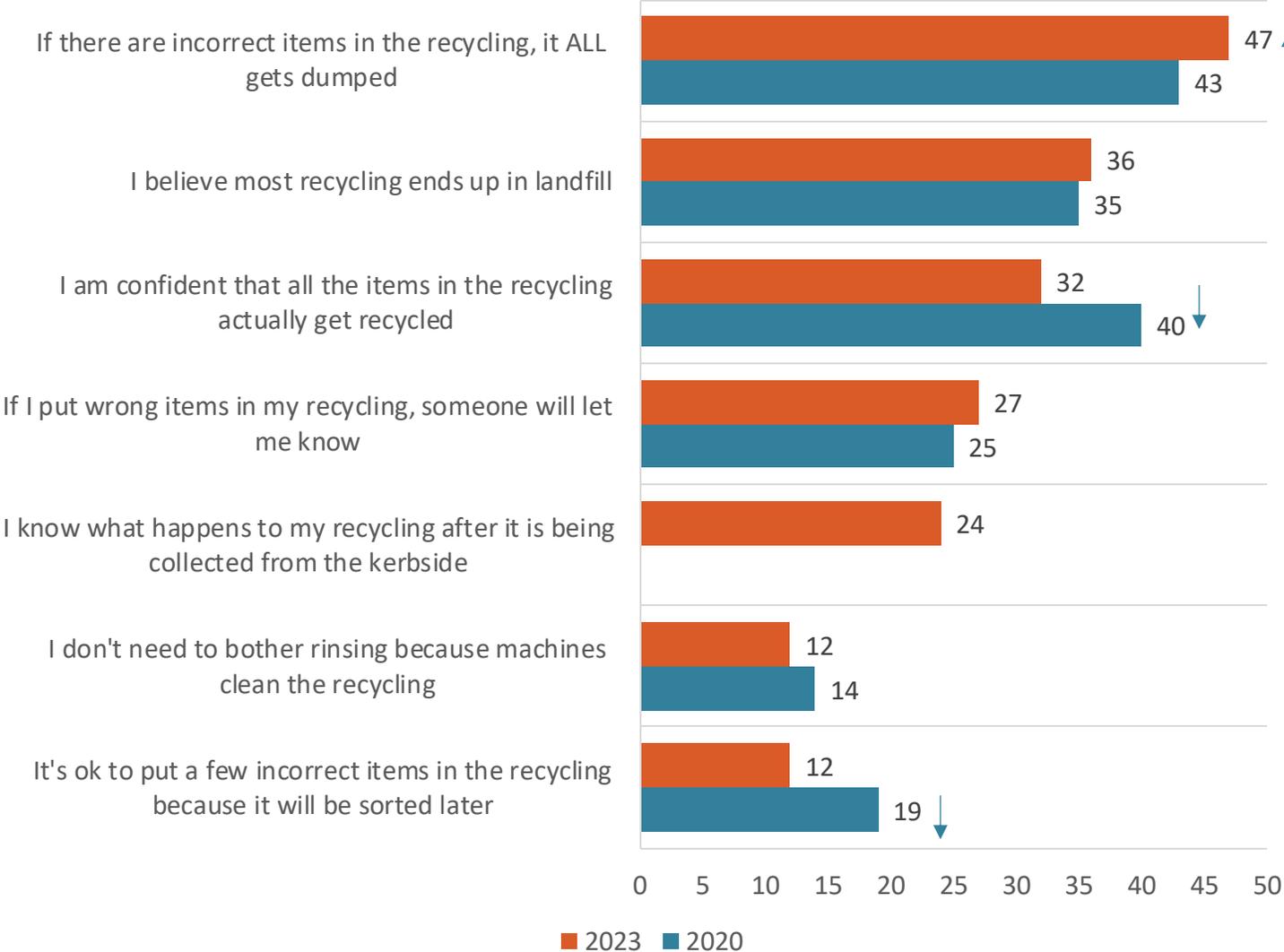
| WasteMINZ 2020 correct responses | |
|----------------------------------|-----|
| 95 | +2 |
| 94 | +2 |
| 93 | +1 |
| 89 | +1 |
| 77 | +9 |
| 76 | +5 |
| 71 | 0 |
| 51 | +12 |

| | |
|----|-----|
| 59 | -16 |
| 52 | -4 |
| - | - |
| 51 | +10 |
| - | - |
| 73 | +4 |
| 84 | -1 |

Getting better

Getting worse

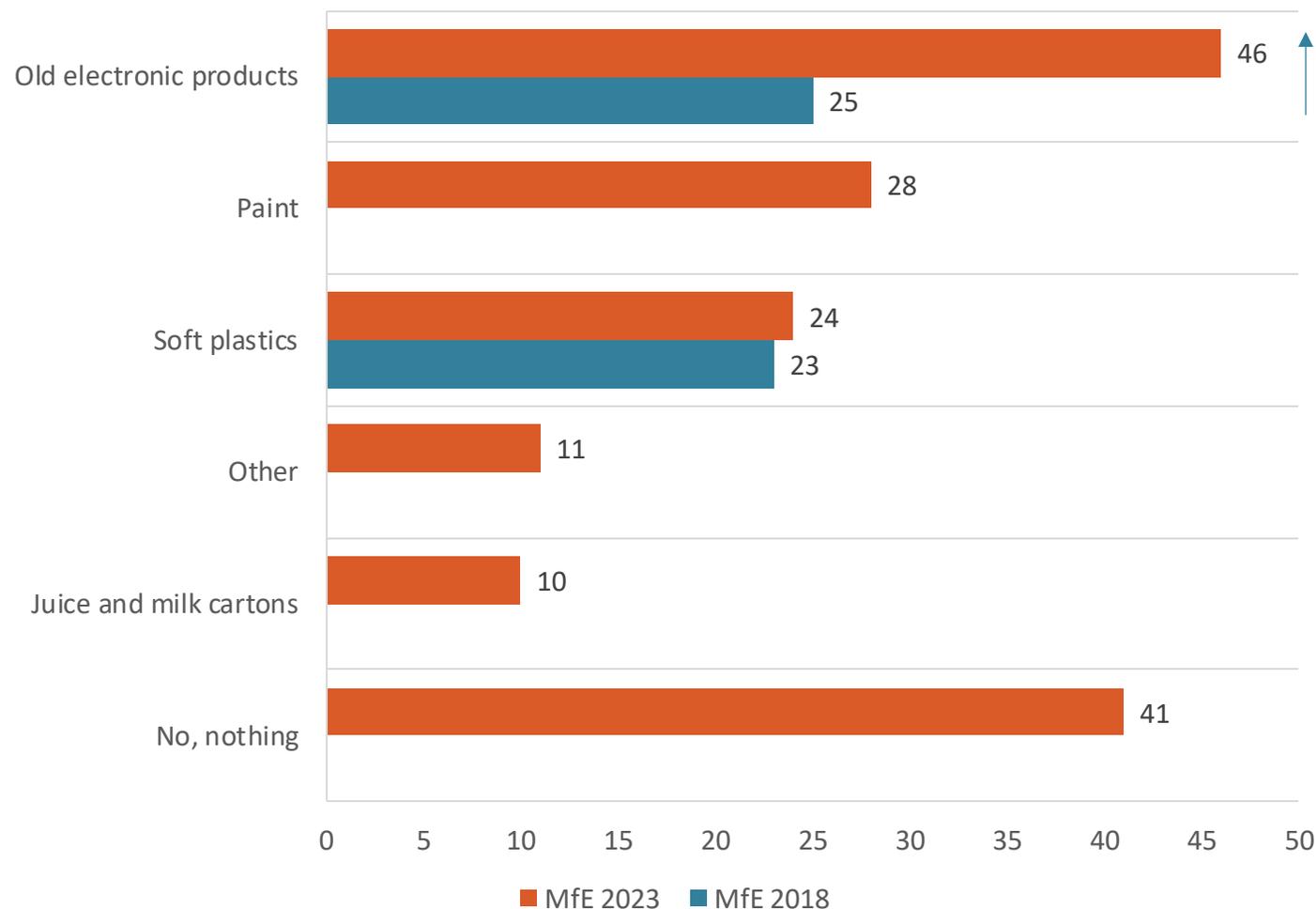
Beliefs and attitudes on the process of recycling



Whilst people are finding it easier to recycle, they are **less confident about what happens to it after it leaves the kerbside and whether it will actually be recycled.**

Similar research in this area found that people were more likely to recycle more if they knew and trusted what happened to their recycling after collection.

Recycling at a separate drop-off location



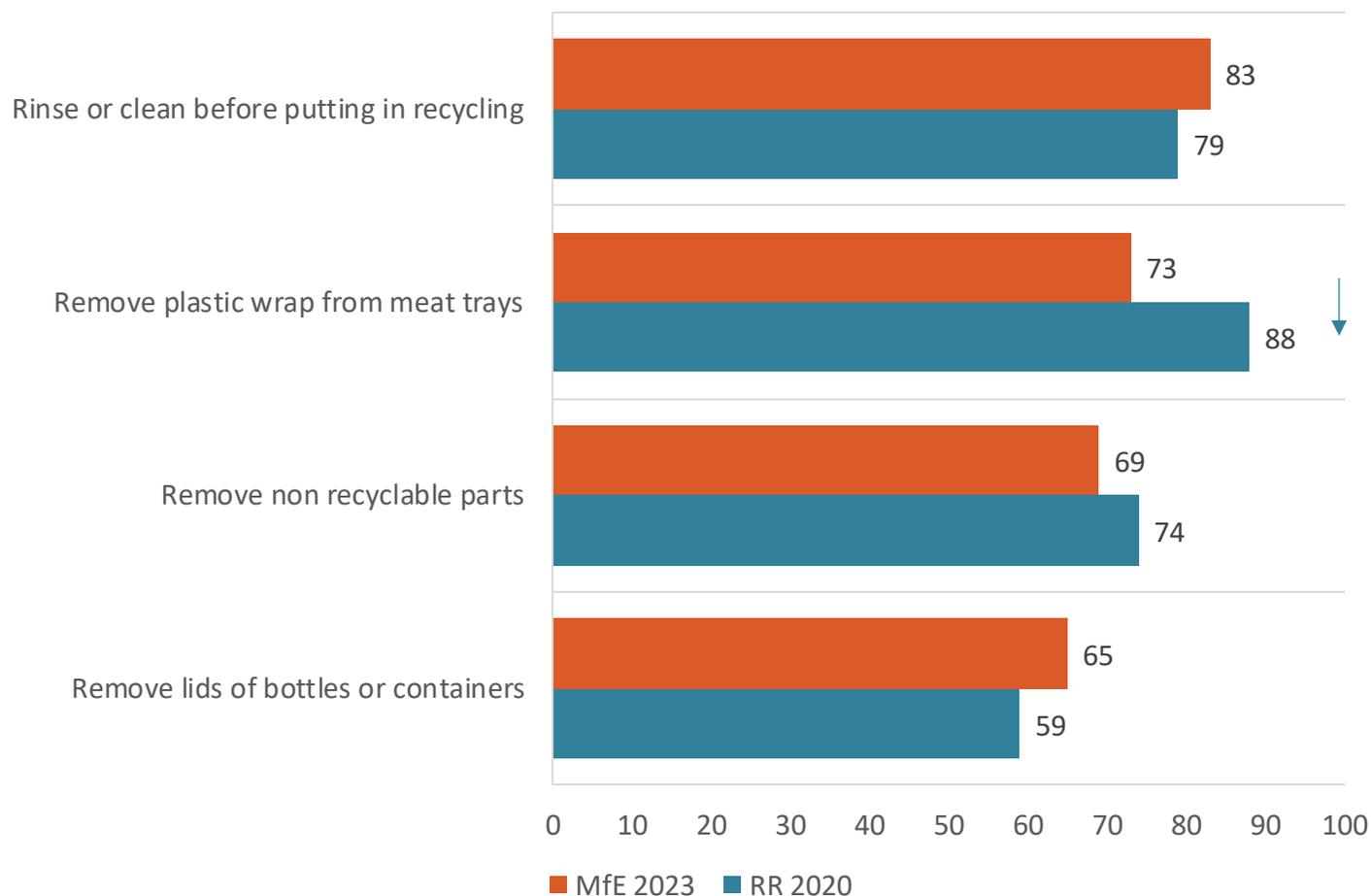
More people say they are dropping off e-waste for recycling, from 25% in 2018 to 46% in 2023. This is followed by paint, with 28%.

Soft plastics collection seem to have stayed the same, but the data from different sources varies.

Some of the items mentioned in “Other” were clothes, batteries and oils.

People are aware of different schemes to recycle items that aren’t accepted in kerbside recycling and are slowly making use of these opportunities.

Actions that are good recycling practice



While in most cases people are doing the right thing before putting items into their recycling bins, **there is still room for improvement.**

Some demographic differences are worth noting in these results, however, such as 90% of respondents from Canterbury stating that they do remove lids before recycling bottles or containers.

What different councils collect and how they communicate these requirements still varies across the country.

Segmentation: waste reduction and recycling

| | Low commitment | Medium commitment | High commitment |
|---|----------------|-------------------|-----------------|
| Actively try to reduce waste | 49% | 75% | 90% |
| Correctly identified 13 or more recyclables out of 15 | 19% | 33% | 31% |
| Go to other location(s) to recycle something else | 43% | 59% | 76% |
| Have kerbside recycling | 87% | 91% | 93% |
| Think others very often or always do a set of 7 recycling/reducing behaviours | 3-42% | 8-54% | 18-63% |

Based on the frequency of their waste minimisation behaviours, people were allocated to either high (upper 25% of the sample), medium (mid 50% of the sample) or low commitment (lower 25% of the sample).

The segments show that how often people do certain actions to minimise their waste reflects in their beliefs, attitudes and related actions.

People with a high commitment to recycling and reusing behaviours are more likely to **also have positive attitudes about recycling and the environment in general.**

Segmentation for reducing and recycling behaviours



Low commitment (25%)

Demographics 'more likely':

- Lower household income <\$50k
- Live in a town
- Live alone

Attitudes 'higher':

- 'Most recycling ends up in landfill'
- 'Don't need to rinse recycling'

Attitudes 'lower':

- 'Worth the time to get recycling right'
- 'Find recycling easy'
- 'Confident items actually get recycled'
- Believe others are also recycling/ reducing
- Less annoyed about food waste/ it harms environment
- Reducing plastic waste/ food waste/ greenhouse gas emissions is important

Knowledge 'lower':

- 'Confident where to place items'
- Lower on correct identification of whether item is recyclable or not

Actions 'less likely':

- Try to reduce waste
- Go somewhere else to recycle
- Have kerbside recycling



Medium commitment (50%)

Demographics 'more likely':

- Earn household income between \$50-100k
- Live in a multi-person household

Attitudes are mostly 'mid to higher range – but 'lower' on:

- 'Will be told if recycling incorrectly'
- 'Don't need to rinse recycling'
- 'Most recycling ends up in landfill'
- 'NZ households don't waste much food'

Knowledge 'mid to higher range':

- 'Know what happens to recycling'
- 'Confident where to place items'
- Believe others are also recycling/ reducing
- Mid range on correct identification of whether item is recyclable or not

Actions 'mid-range but a majority':

- Try to reduce waste
- Go somewhere else to recycle
- Have kerbside recycling



High commitment (25%)

Demographics 'more likely':

- Female
- Higher household income >\$100k
- Live in rural area

Attitudes 'higher':

- 'Worth the time to get recycling right'
- 'Find recycling easy'
- 'Confident items actually get recycled'
- 'Will be told if recycling incorrectly'
- Believe others are also recycling/ reducing
- Reducing plastic waste/ food waste/ greenhouse gas emissions is important
- Annoyed about food waste/ it harms environment

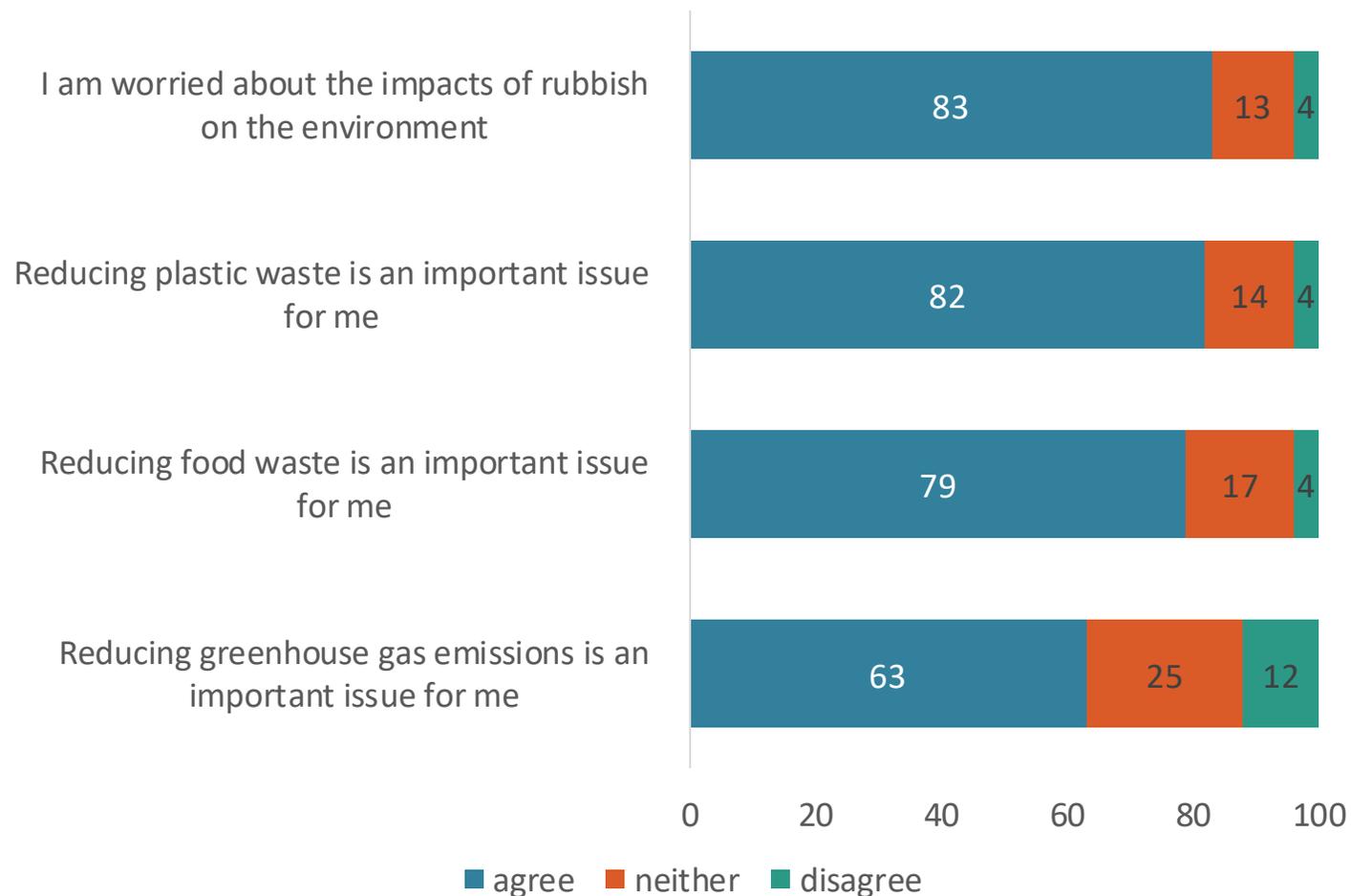
Knowledge 'higher':

- 'Know what happens to recycling'
- 'Confident where to place items'
- Higher on correct identification of whether item is recyclable or not

Actions 'more likely':

- Try to reduce waste
- Go somewhere else to recycle
- Have kerbside recycling

Statements about reducing waste



Most people consider **the impact of rubbish on the environment and reducing plastic and food waste important issues.**

Specifically on food waste, the 79% figure is exactly the same as in previous research from 2018 (LFHW) and 2022 (Rabobank).

Caring about waste, however, doesn't reflect in the importance given to reducing greenhouse gas emissions.

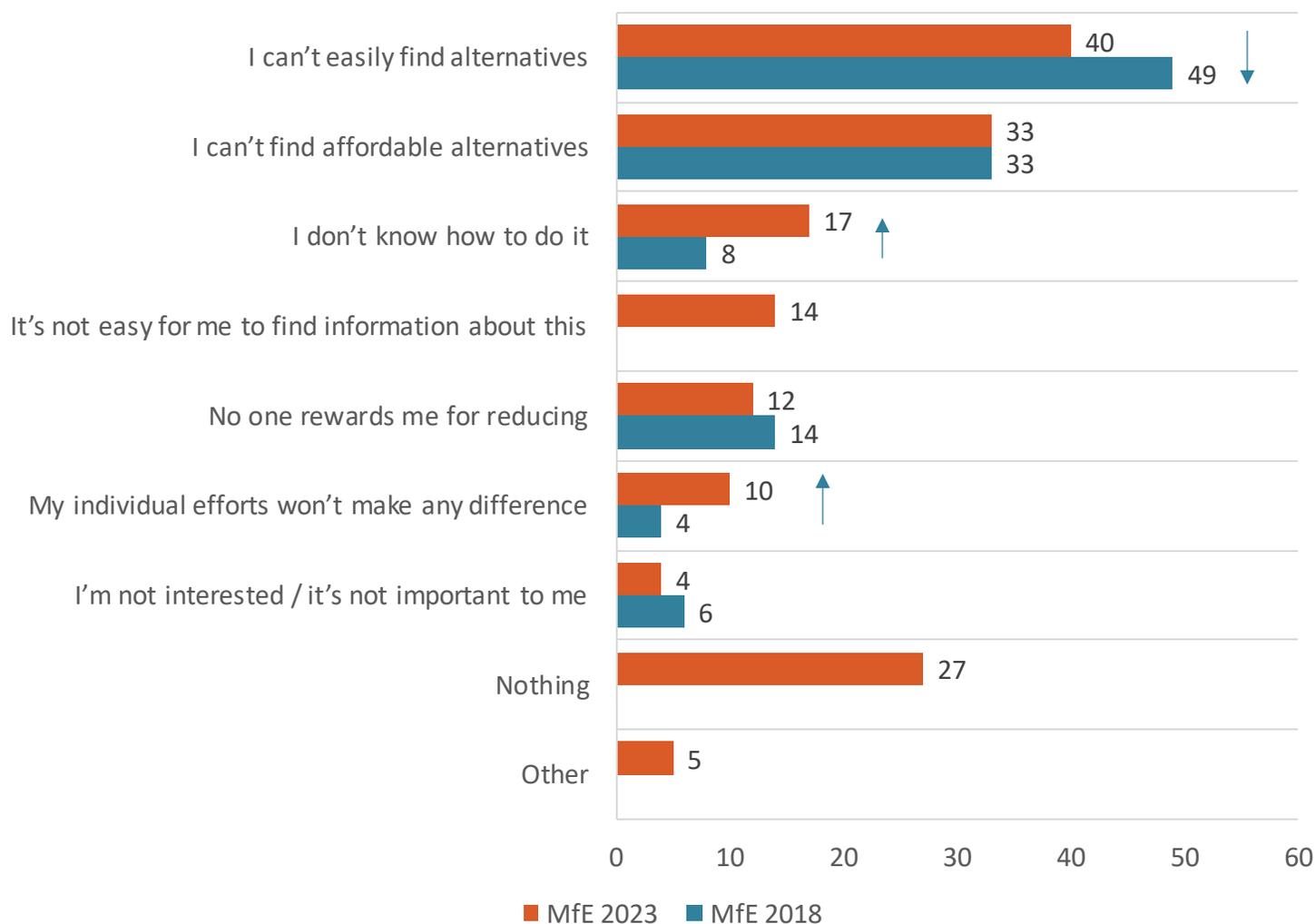
Research has also shown that messaging on the connection between climate change and waste reduction is less effective than emphasizing other benefits, such as time or money saved.

Plastics



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Barriers to reducing plastic waste

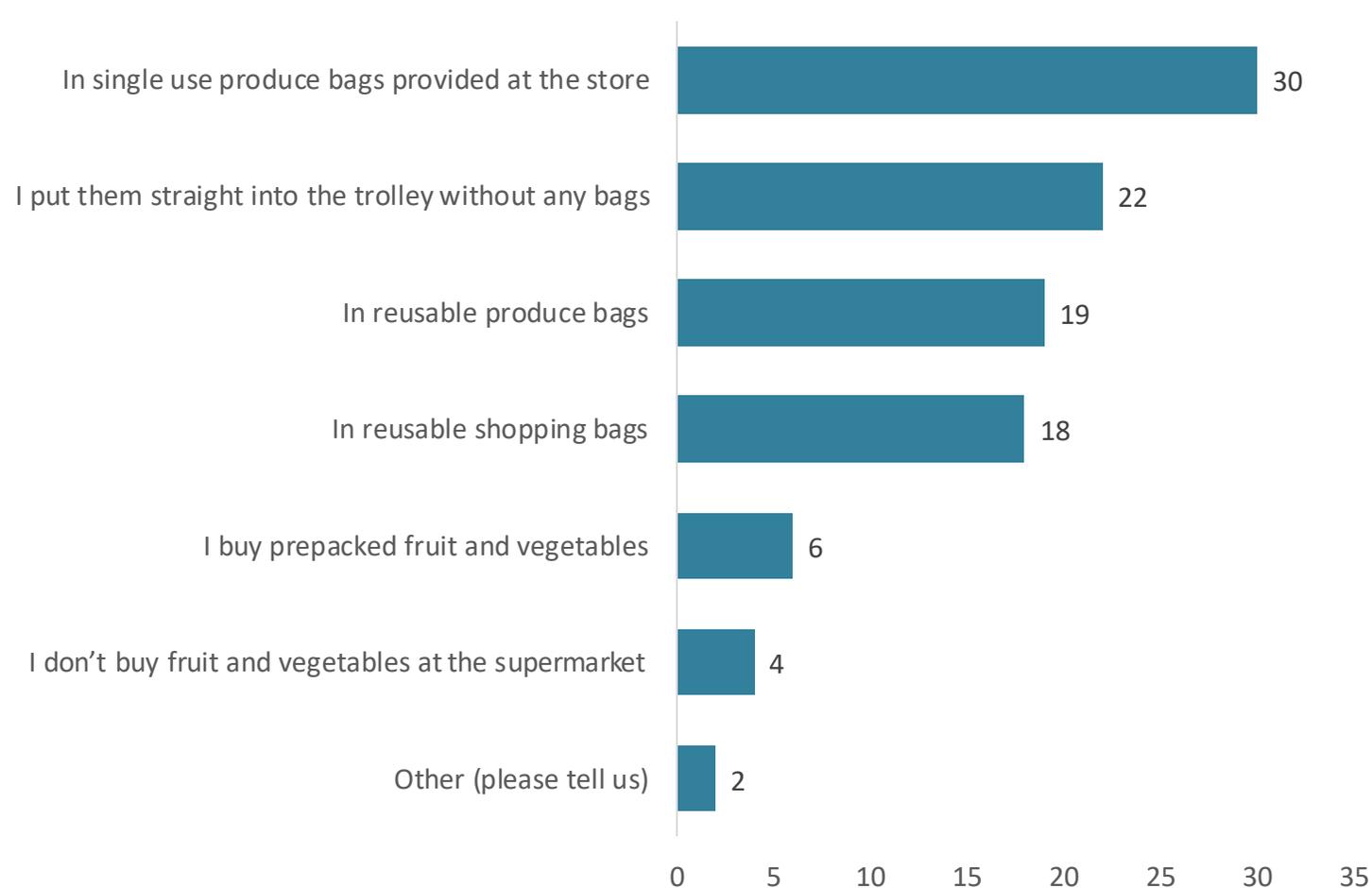


These are the main barriers preventing people from reducing the amounts of plastic waste they create.

The **difficulty of finding an alternative to plastic has reduced** since 2018, but the affordability of these alternatives as a barrier remains the same.

However, knowledge of **how to reduce plastic waste seems to have worsened**, along with the perception that individual efforts won't make a difference.

Packing produce at the shops

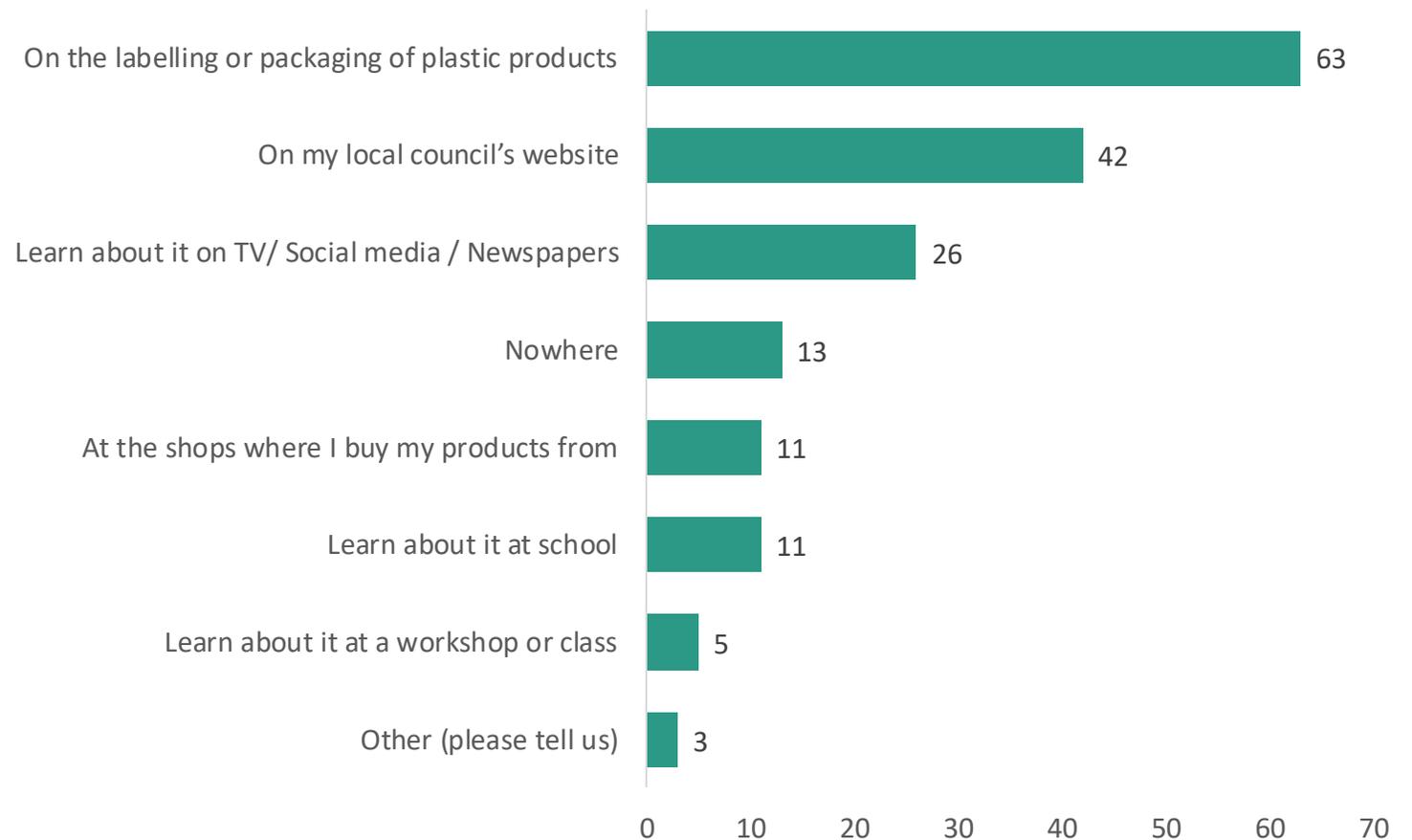


We asked people how they pack fruit and vegetables when shopping at the supermarket to have a baseline to track changes from the phase out of single use plastic produce bags.

Single-use produce bags provided at the store was the most popular option used by 30% of people, while other options were done to a lesser degree.

Q: How do you pack fruit and vegetables when you are shopping at the supermarket? (%)

Finding information about disposing of plastic



Asked where they get information about how to dispose of their plastic waste, **most people responded that they check the labelling or packaging of the product.**

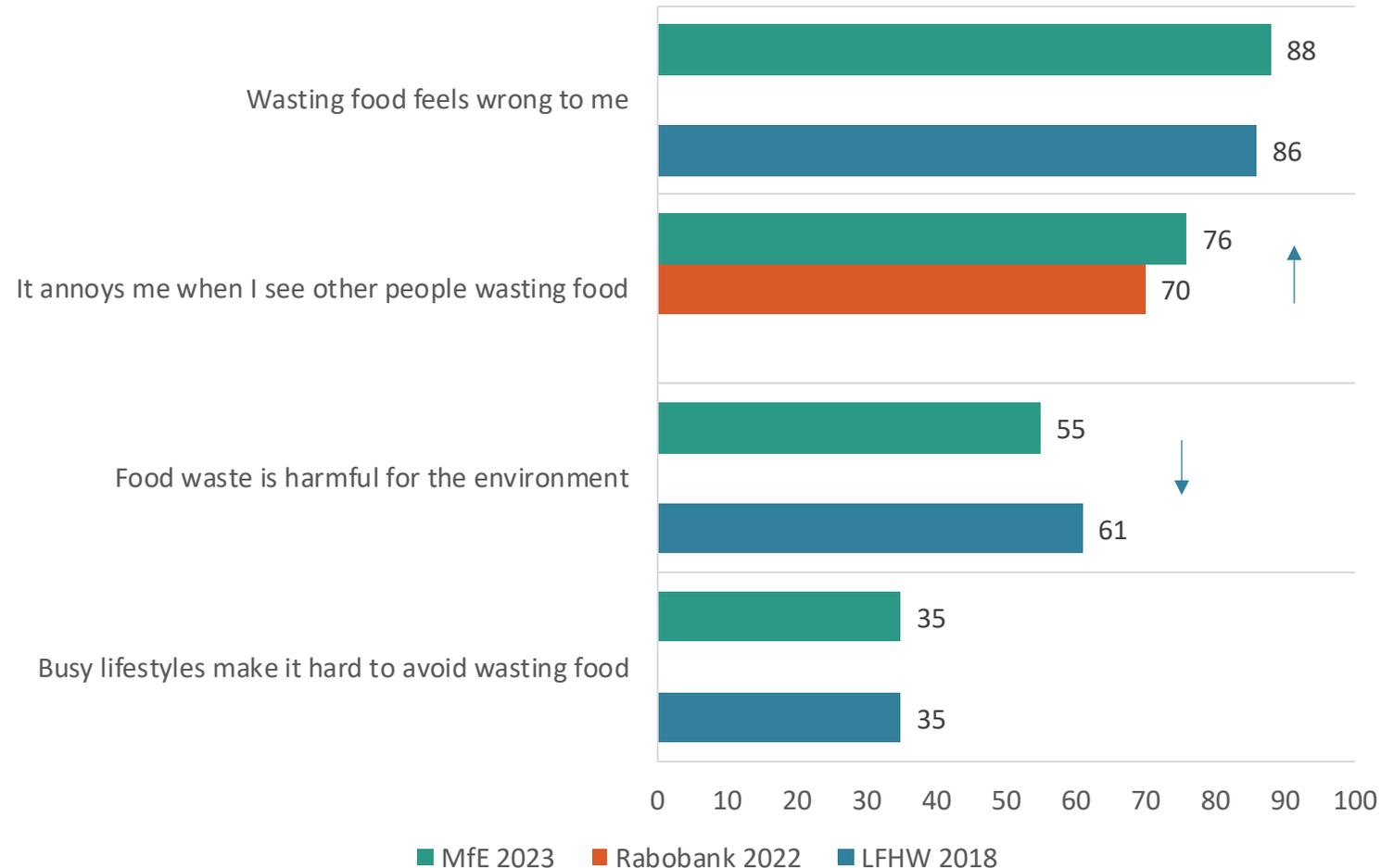
The second most common response was to check on their local council's website, followed by learning about it from the media.

Focus on Food Waste



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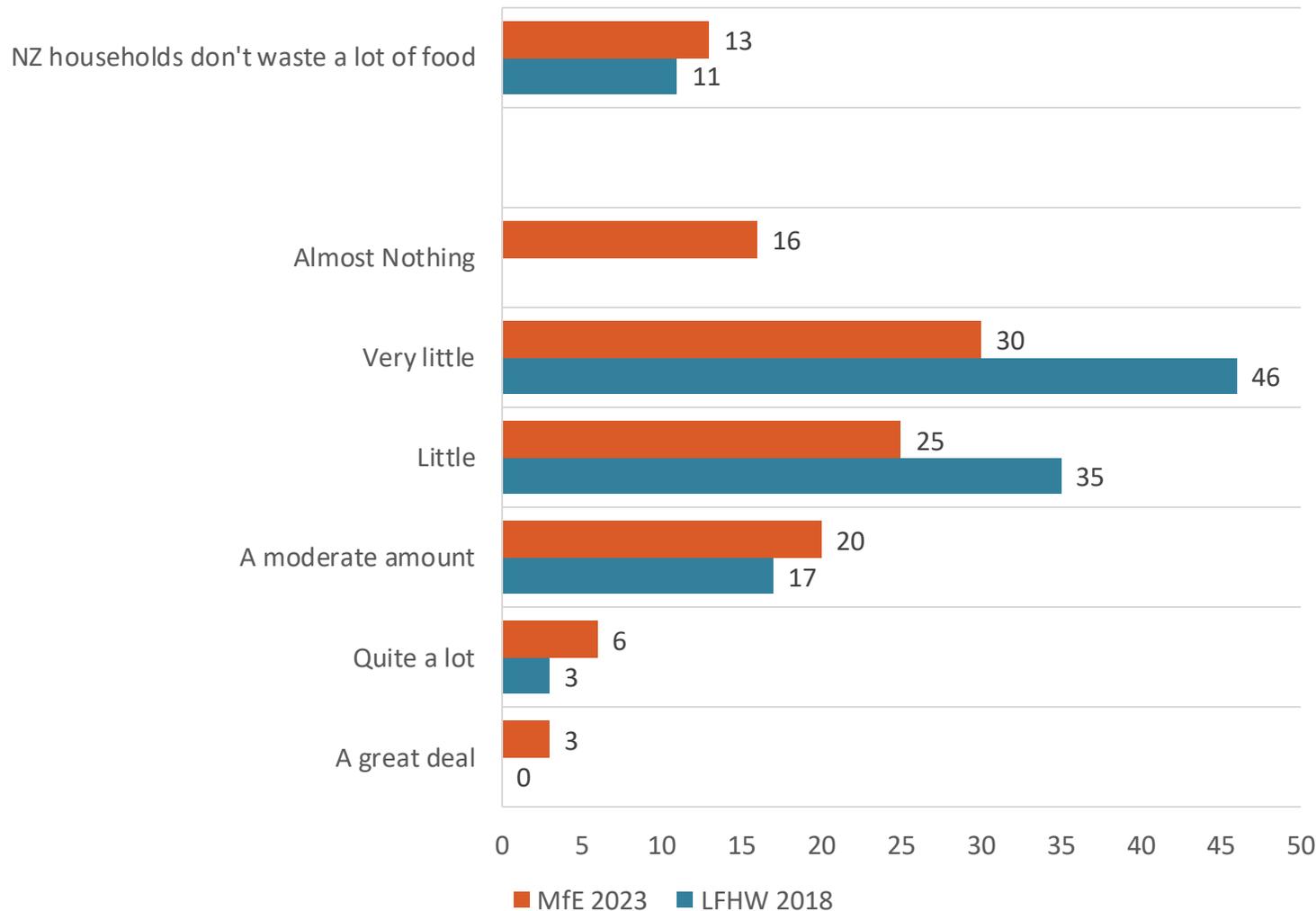
Attitudes and beliefs about wasting food



Most people are uncomfortable wasting food and seeing others do so, but results have not changed much compared to previous research.

Moreover, people do not understand that food waste can have a negative environmental impact due to the emissions created on disposal, with even a trend showing a decrease in this belief.

Amounts of household food waste



There is a strong belief that New Zealand households waste a significant amount of food (87%).

However, when asked about their own food waste, **most people claim to throw away almost nothing to little amounts of food (71%).**

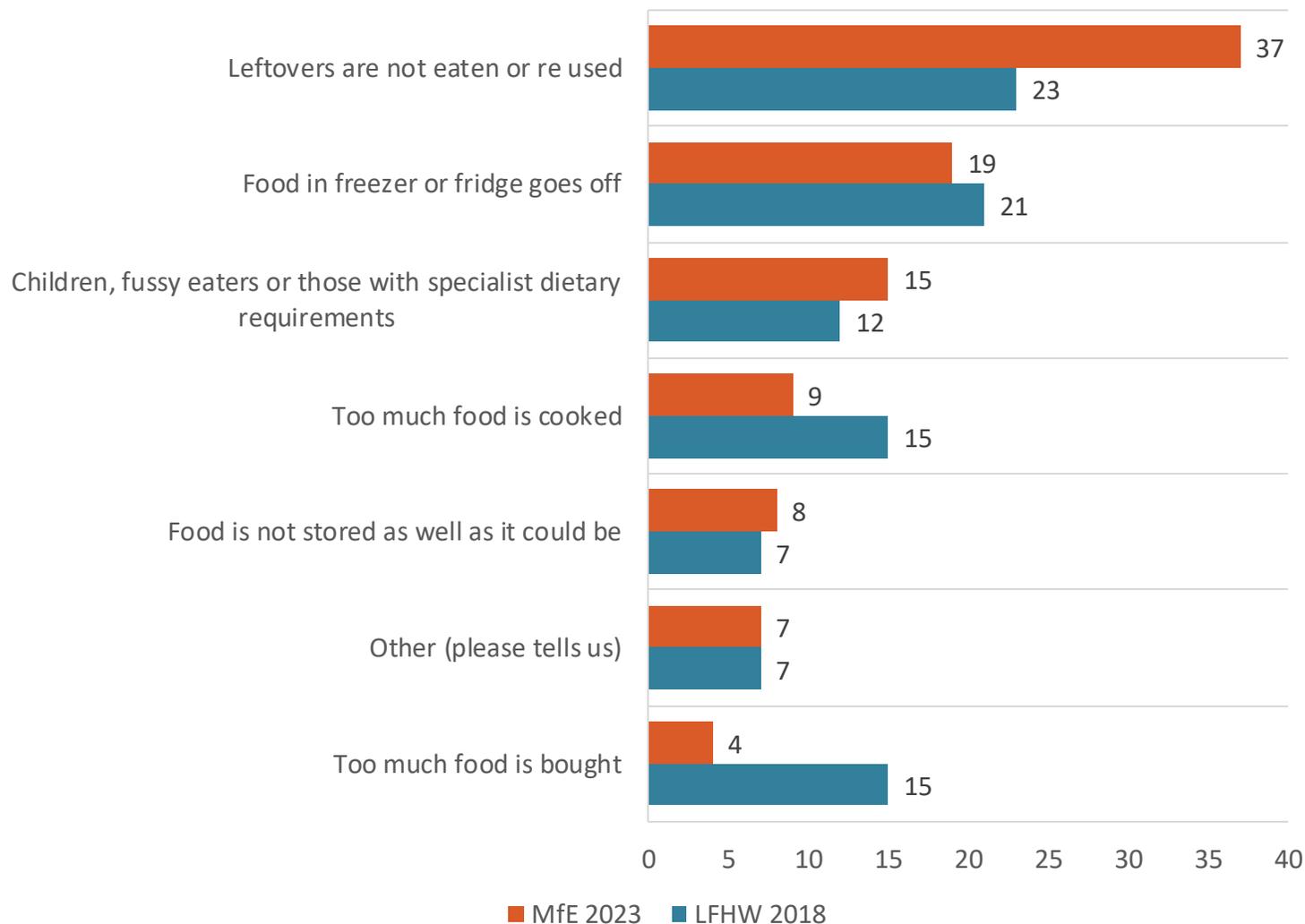
This propensity to underestimate one's own food waste has also been found in research into food scraps collections.

This shows **the disconnect between people's perceptions of themselves versus what they actually do.**

Q1: How much do you agree or disagree with the following statements about reducing food waste? (% totally agree + agree)

Q2: In general, how much uneaten food would you say your household usually throws away that could have been eaten?

Reasons for wasting food at home

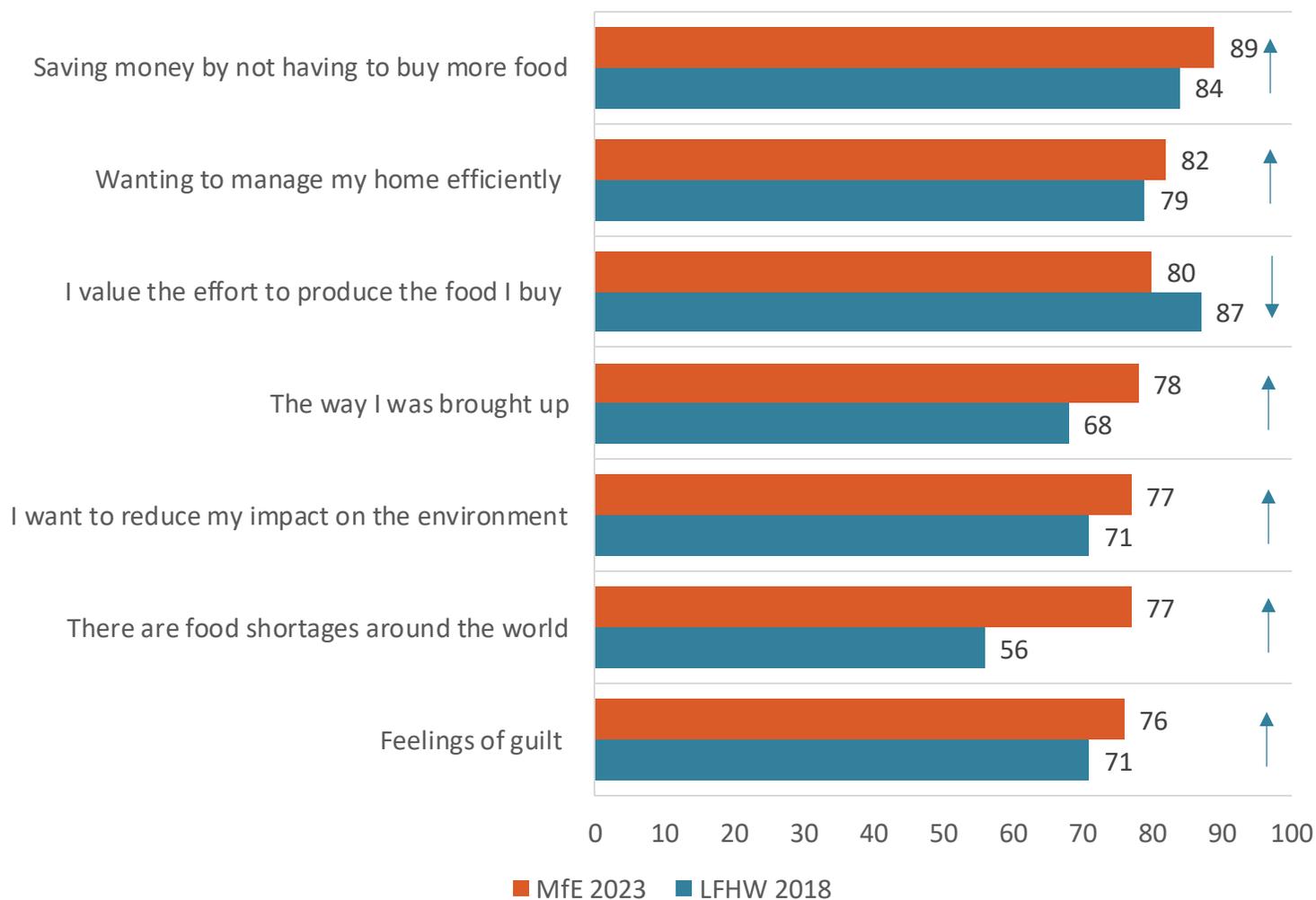


Leftovers not being eaten or reused is the main reason people are wasting food, and this is also the biggest change since the 2018 Love Food Hate Waste survey.

Food going off in the fridge or freezer comes in second place.

Buying too much food is not a relevant reason for most in 2023, while it was much more prominent in 2018.

Motivators to reduce food waste



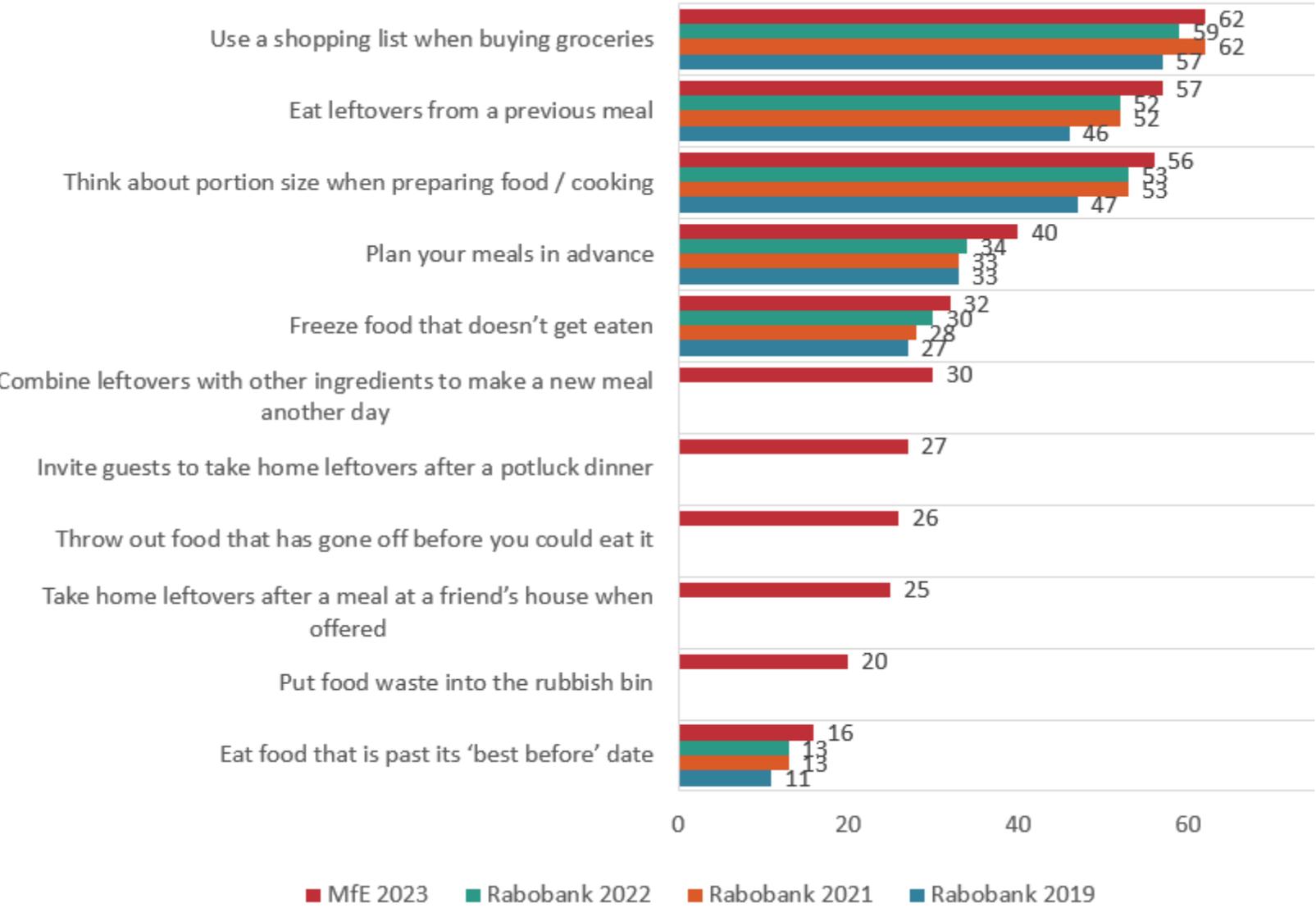
In most cases, 2023 results have increased from 2018 values.

The most important motivators are saving money, wanting to manage the home efficiently and valuing the effort to produce food.

However, all other statements are relevant motivators for most people.

The only downwards trend is for valuing the effort to produce the food people buy.

Frequency of food waste behaviours



The most common food waste reduction behaviour is using a shopping list when buying groceries, followed by eating leftovers from a previous meal and thinking about portion sizes.

This has remained relatively consistent throughout the years, though minor upwards trends can be seen.

It is interesting to note that only 20% of people say they put food waste into the rubbish bin, whereas in actual bin audits only 6% have no food waste.

Q: How often does the following occur in your household? (% always)

Segmentation based on the amount of food wasted

Based on the analysis undertaken by the 2018 Love Food Hate Waste research, respondents were segmented into low, medium and high food wastage groups, depending on how much food they reported to waste per week.

| | | How much food is thrown out | | |
|---|-------------------------|-------------------------------|-------------|----------------|
| | | None at all or almost nothing | Very little | Little or more |
| 2L ice-cream container of food waste per week | Less than a quarter | 30% | 13% | 4% |
| | One quarter to one half | 1% | 5% | 6% |
| | One half or more | 2% | 7% | 33% |

Q1: Using a 2L ice-cream container as a guide, approximately how much food does your household throw away that could have been eaten PER WEEK? This also includes any food that was fed to animals or composted?

Q2: In general, how much uneaten food would you say your household usually throws away that could have been eaten? This also includes any food that was fed to animals or composted. For example, food and drink that was edible at some point before being thrown? (%)

Segmentation based on the amount of food wasted

High wastage (33%)



Demographics 'more likely':

- Younger aged <44 years
- Higher household income >\$100k
- Māori
- Multi-person household

Attitudes 'higher':

- 'Busy lifestyle makes it harder to avoid wasting food'

Attitudes 'lower':

- 'Reducing food waste is important'
- 'Wasting food feels wrong'

Motivations 'lower':

- 'Way brought up'
- 'Value effort to produce food'
- 'Want to manage home efficiently'

Actions 'less likely':

- 'To use a shopping list'
- 'Plan meals in advance'
- 'Combine leftovers to make another meal'
- 'Freeze uneaten food'

Actions 'more likely':

- 'Throw out food that has gone off'
- 'Put food waste into rubbish bin'

Medium wastage (38%)



Demographics 'less likely':

- Male

Attitudes:

- Most similar to 'low wastage' group, apart from 'busy lifestyles make it hard to avoid wasting food'

Motivations 'lower':

- 'Saving money'
- 'Food shortages around the world'
- 'Feeling guilty throwing out food'
- 'Way brought up'
- 'Value effort to produce food'

Actions 'more likely':

- 'Think about portion size when cooking'
- 'Throw out food that has gone off' and more comparable to 'high wastage' group on 'put food waste into rubbish bin'

Low wastage (30%)



Demographics 'more likely':

- Older >60 years
- Lower household income <\$50k
- Live alone

Attitudes 'higher':

- 'Reducing food waste is important'
- 'Wasting food feels wrong'
- 'Annoys me to see other people wasting food'

Attitudes 'lower':

- 'Busy lifestyle makes it harder to avoid wasting food'

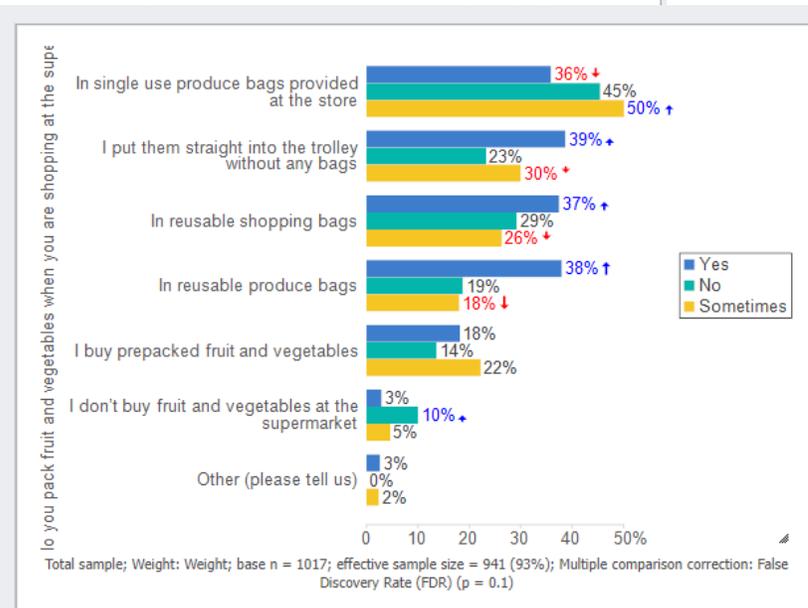
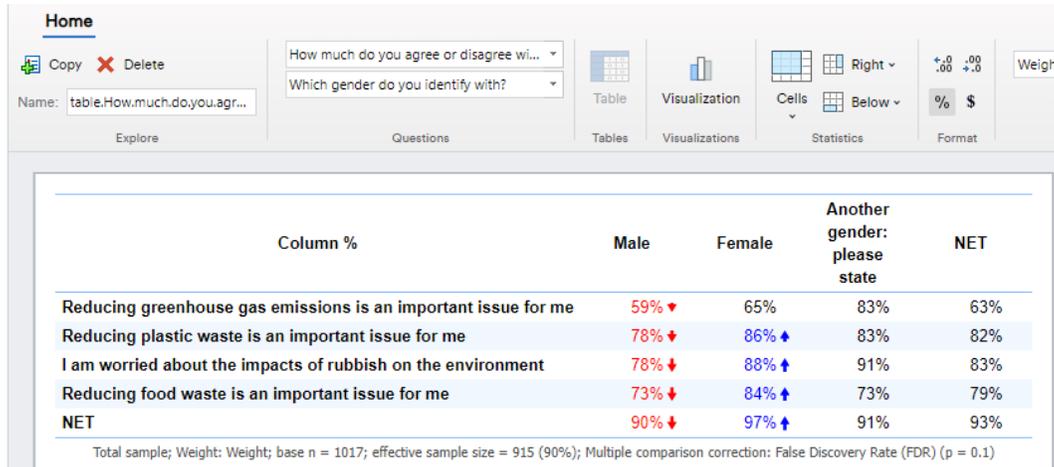
Motivations 'higher':

- On all motivating factors to reduce food waste

Actions 'more likely':

- To do range of food waste reduction actions and **LESS** likely to 'throw out food that has gone off' or 'put food waste in the rubbish bin'

Interactive Dashboard



AK Research and Consulting provided an interactive dashboard to analyse the survey data further.

This dashboard lets you compare one question with another, finding significant differences between groups of respondents. This data can help those undertaking research into waste minimisations behaviours, attitudes and beliefs in New Zealand.

An example of what this looks like is to the left.

Contact WasteBehaviourChange@mfe.govt.nz if you would like to request access to the dashboard.

What these results mean and next steps

We can see the impact of our policies on what people think they do.

- Measuring what people say they do does have its limitations, and we need to align these findings with measurements of people's actual behaviours (ie through audits or changes in produce bag use).
- The behaviours, attitudes and beliefs presented in this survey will be tracked for the next few years, and we expect to see further improvements in areas where Government is investing or where there are specific policy initiatives.

See more of the research that the Government has funded or co-funded here: [MfE Behavioural Insights research page](#)

Some questions from the 2023 survey have not been included in this presentation due to space, but the full survey report by AK Research and Consulting available to download from the link above, as well as these slides.



Pātai | Questions?

Karakia

Kia whakairia te tapu

Restrictions are moved aside

Kia wātea ai te ara

So the pathways is clear

Kia turuki whakataha ai

To return to everyday activities

Kia turuki whakataha ai

Haumi e. Hui e. Tāiki e!



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Appendix

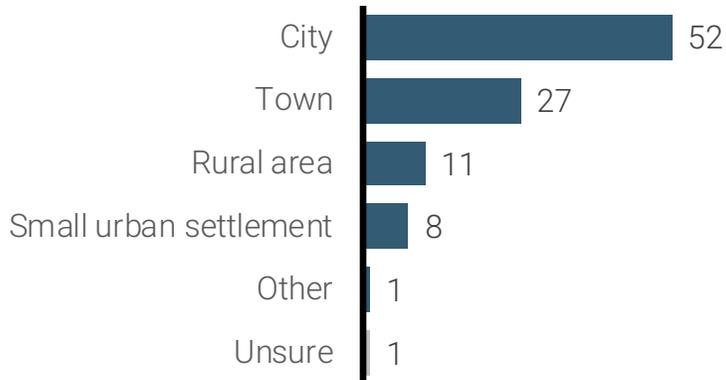


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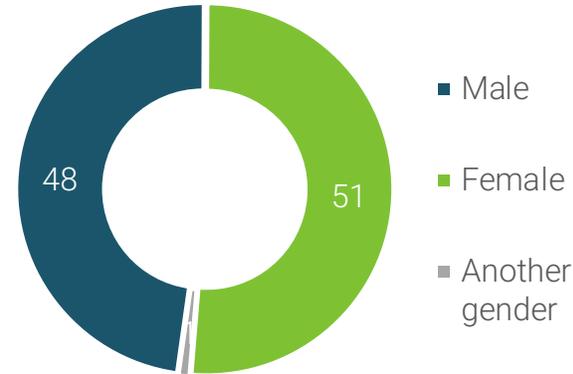


2023 Survey demographics

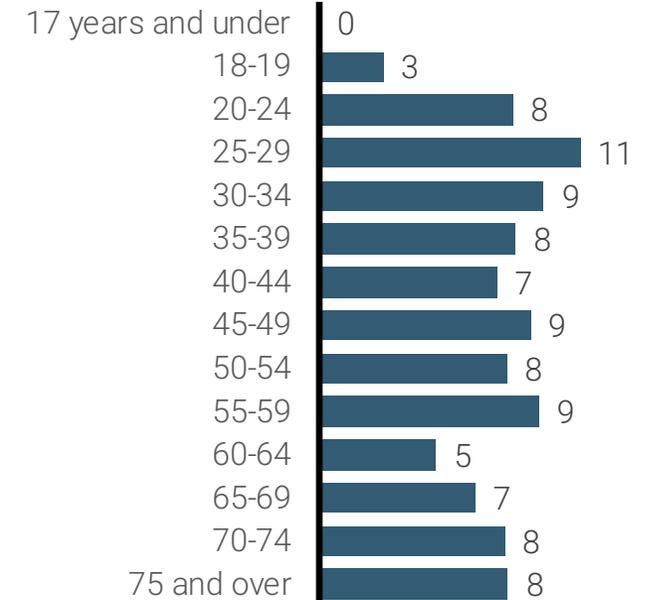
Settlement



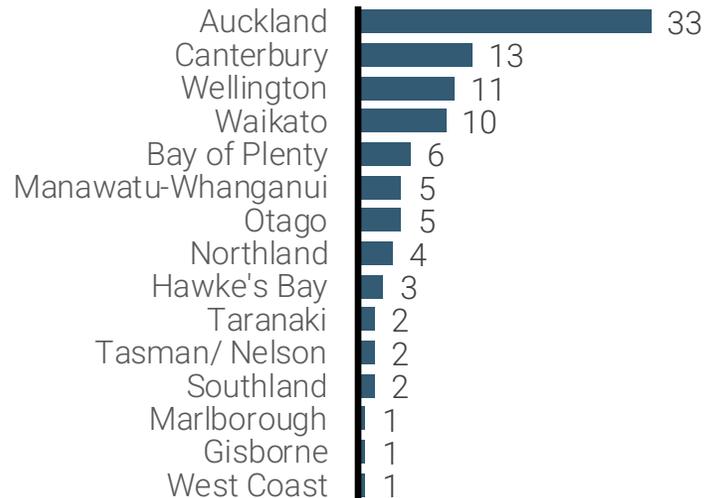
Gender



Age group



Region



Household income

| | |
|--------------------|----|
| <\$50,000 | 26 |
| \$50,001-\$100,000 | 36 |
| >\$100 | 28 |

Household occupants

| | |
|----------------------------|----|
| Spouse/partner | 58 |
| Children aged under 18 | 29 |
| No one | 16 |
| Parents | 10 |
| Flatmates | 8 |
| Other adult family members | 14 |
| Other | 1 |

Ethnicity

| | |
|-------------------|----|
| NZ European | 68 |
| Asian | 15 |
| NZ Māori | 13 |
| Pasifika | 6 |
| Prefer not to say | 2 |
| Other | 8 |

Base: All respondents (n=1017)

Technical details for surveys used in comparisons

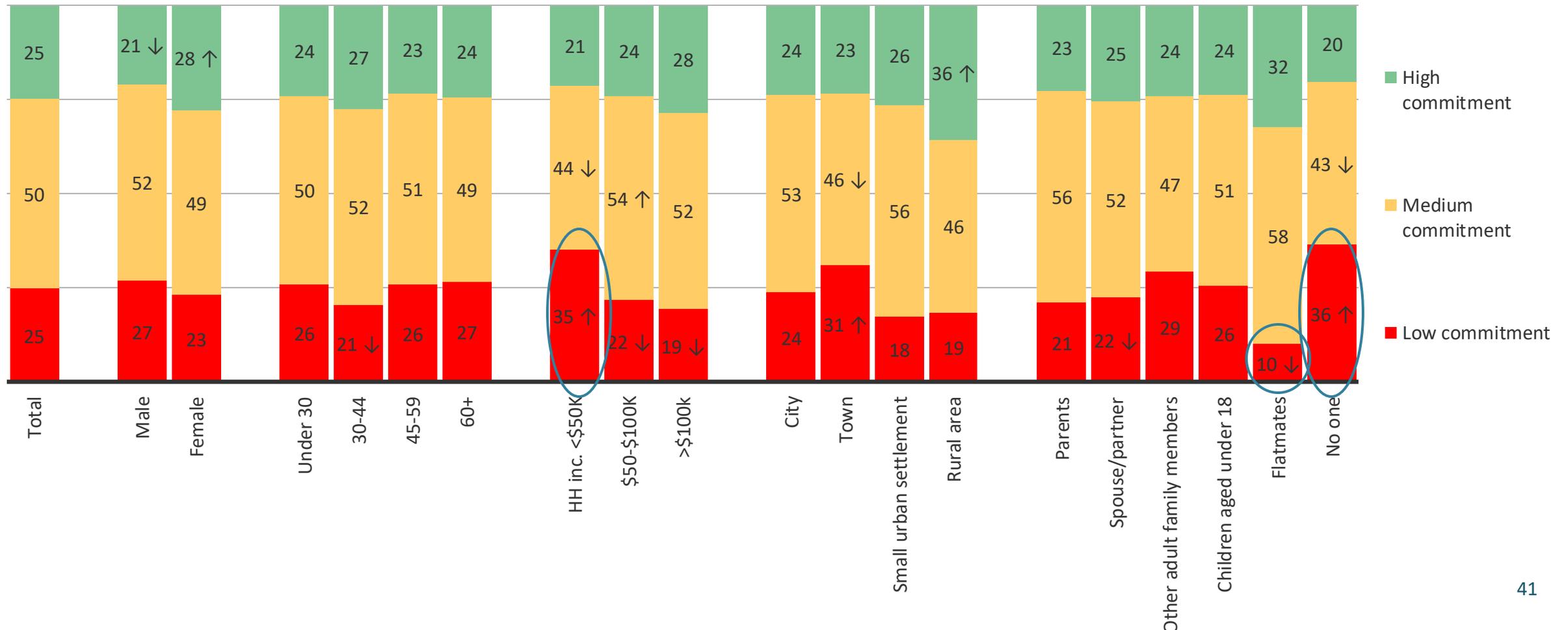
Ministry for the Environment and Colmar Brunton, 2018. Environmental Attitudes Baseline. Nationally representative sample, n= 1,004. Online survey, 13-26 April 2018, 18+. +/-3.1% margin of error. [PowerPoint Presentation \(environment.govt.nz\)](#)

WasteMINZ and Key Research, 2018. Love Food Hate Waste National Food Waste Prevention Study. Nationally representative sample, n= 1,005. Online survey, 5-10 September 2018. Ban on single-use plastic bags announced 10 August 2018. Based on 2014 questionnaire, using other 4 surveys to inform questions. WasteMINZ steering committee reviewed draft. Pilot survey n=30. Tested for significance level 95%. [National Food Waste Prevention Study \(lovefoodhatewaste.co.nz\)](#)

WasteMINZ and Colmar Brunton, 2020. Rethinking Rubbish. Nationally representative sample, n=1,741. Online survey conducted 10-23 March 2020. Developed in light of research by NSW EPA. 7 councils requested booster samples (100 to 300 additional responses). Representativeness of each area was ensured. Weighted in line with 2018 census. +/-2.3% margin of error. [Rethinking Rubbish & Recycling \(environment.govt.nz\)](#)

Rabobank, Kiwiharvest and Kantar, 2022. Food Waste Survey. Nationally representative sample, n=1,502 . Online interviews from 4-18 April 2022. An additional sample boost was included to provide greater granularity around rural New Zealanders. Data was post-weighted to ensure results are nationally representative – with results compared to 2021 where questions were consistent. Segmentations according to 8 types of respondents. [Food Waste | Rabobank New Zealand](#)

Demographic differences between reducing and recycling segments



Demographic differences between food waste segments

