

## Aotearoa/ New Zealand Consumer Polling – Container Return Scheme. Briefing

September 2022

Reloop commissioned Kantar/Consumer Link in Aotearoa/New Zealand to undertake consumer research polling regarding the New Zealand Government's proposal to introduce a beverage container return scheme (CRS).

The polling was carried out during August 2022 via Kantar/Consumer Link's omnibus research, utilising their standard, representative survey approach (details of this study can be obtained upon request).

The following outlines results of this study.

### Introduction

The Aotearoa/New Zealand Government is currently consulting on a CRS. The consultation paper outlines a best practice, European inspired approach of retail return points, coupled with the use of resource recovery centres for consumer and hospitality collections. The Government has also stated its preference for a NZ20cent deposit and the inclusion of all beverage packaging materials in the scheme.

The survey found that New Zealand consumers are overwhelmingly in favour of the Government's proposal to introduce a CRS for the recycling of beverage containers. Most consumers indicated a preference for the deposit to be set at NZ30cents, rather than the proposed NZ20cents, and say they are most likely to engage with the scheme if supermarket-based container return points are involved.

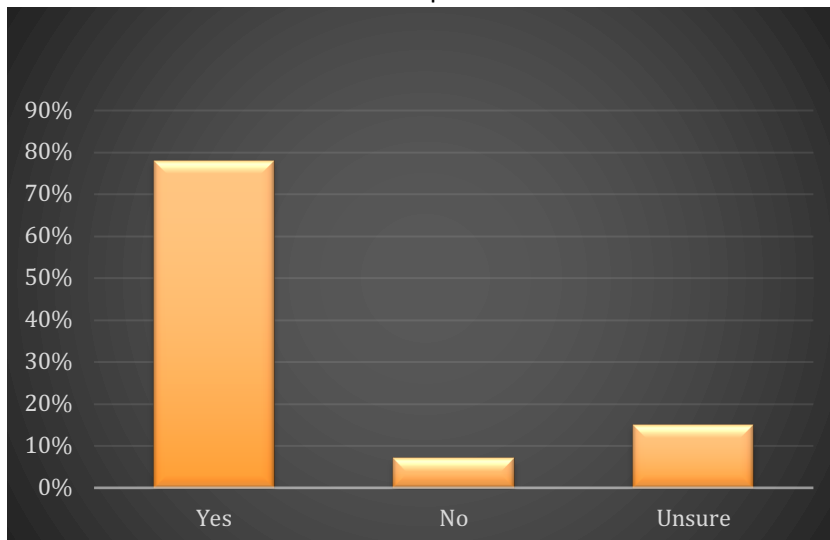
### Executive Summary

1. **Consumer support** for introducing a CRS on beverage packaging in Aotearoa/New Zealand Government is 78%. Fifteen percent of consumers declared they were unsure, presumably requiring further detail about the scheme's design and operation, and only 7% were not in favour of such a scheme.
2. The **preferred deposit value** is NZ30cents as stated by 52% of consumers.
3. In a separate question, 78% of consumers said they would be willing to return empty containers for a refund (i.e. engage with the scheme) if the deposit was set at NZ30cents.
  - a. 66% of consumers said they would be willing to return empty containers for a refund if the deposit was set at NZ20cents
  - b. Only 45% said they would be willing to return empty containers for a refund if the deposit was set at NZ10cents.
4. **Inclusion of glass** - 95% of consumers believe all glass drink containers should be included in the scheme (similar results applied to aluminium and plastics at 92%)
5. **Refillable containers** - 71% of consumers supported the reintroduction of refillable containers in the DRS, stating they would buy drinks in this format.
6. **Return point locations** - In terms of where consumers said they would return their empty containers for their refund,
  - a. 89% stated they would use a supermarket located collection point
  - b. 70% stated they would use a small retail store

- c. 51% said they would use a resource recovery centre
  - d. 31% said they would utilise a depot (located in a light industrial area)
7. **Consumer preferences** for these various refund sites, i.e. the type of collection point consumers would be most likely to use (most often) were:
- a. 73% would preference supermarket based collection points
  - b. 12% prefer small retail stores (Dairy)
  - c. 10% prefer resource recovery centres (it's also assumed that the hospitality sector would predominantly be utilising return via these RRC's or depots)
  - d. 5% of consumers said they would prefer using a depot for their recycling

### Consumer support for an Aotearoa/New Zealand DRS

Overall support for the introduction of a DRS in Aotearoa/New Zealand remains high at 78%. While a relatively high percentage of consumers stated they were “unsure” (15%), Reloop believes that this is due to a lack of information, and that most of these consumers have a desire to learn more about scheme parameters.

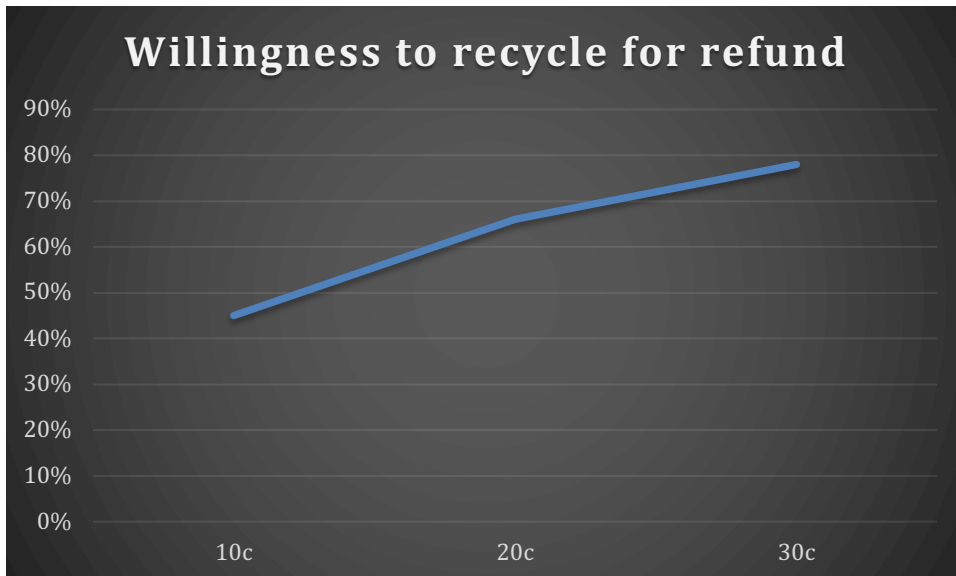


### Preferred Deposit / Refund Value

The Aotearoa/New Zealand Government’s consultation paper outlines a preferred deposit of 20cents. When presented with the three deposit options of NZ10, 20 or 30cents, the majority (52%) of consumers supported the government adoption of a 30cent deposit; 33% believed the government should legislate a 20cent refund and only 10% believed the lower 10cent deposit should be legislated.

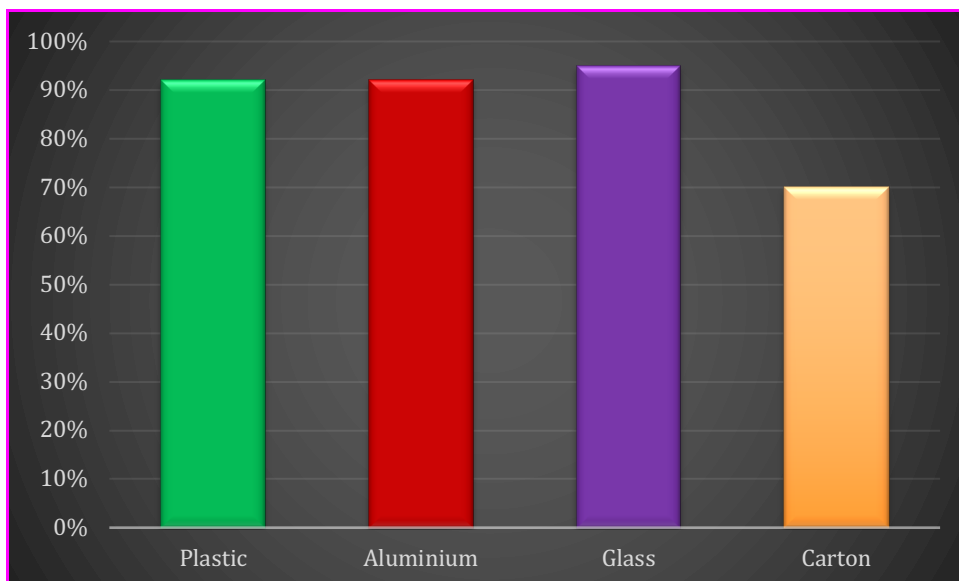
In a separate question regarding consumers willingness to engage in the CRS, 78% of consumers say they would engage with the scheme at 30cents – i.e. take their used containers to a collection point location to access their refund; 66% would engage at 20cents and only 45% of consumers would seek out their refund if the refund value was only 10cents.

It’s worth noting that the best performing deposit return schemes globally (e.g. Germany, Finland, Sweden, Norway, etc; reaching 90%+ recovery rates) have deposits equivalent to around NZ40cents (20-25 euro cents), as well as high levels of consumer convenience.



### Materials to be included in the DRS

Ninety-five percent of consumers believed glass beverage containers should be included in the DRS. In fact, the inclusion of glass received the highest level of support, followed by plastic and aluminium at 92%. Only 70% of consumers supported the inclusion of cartons.

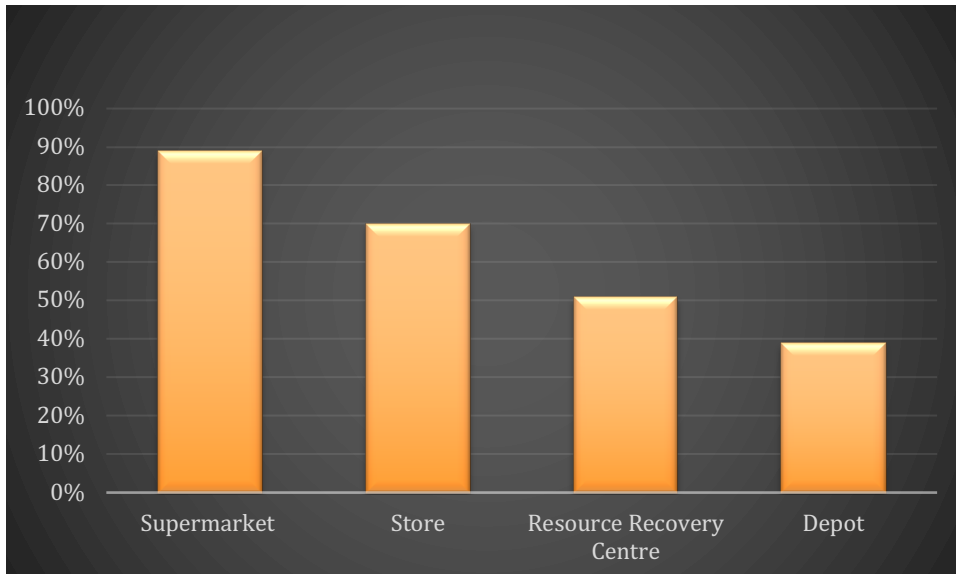


### Preferred Refund Point Locations

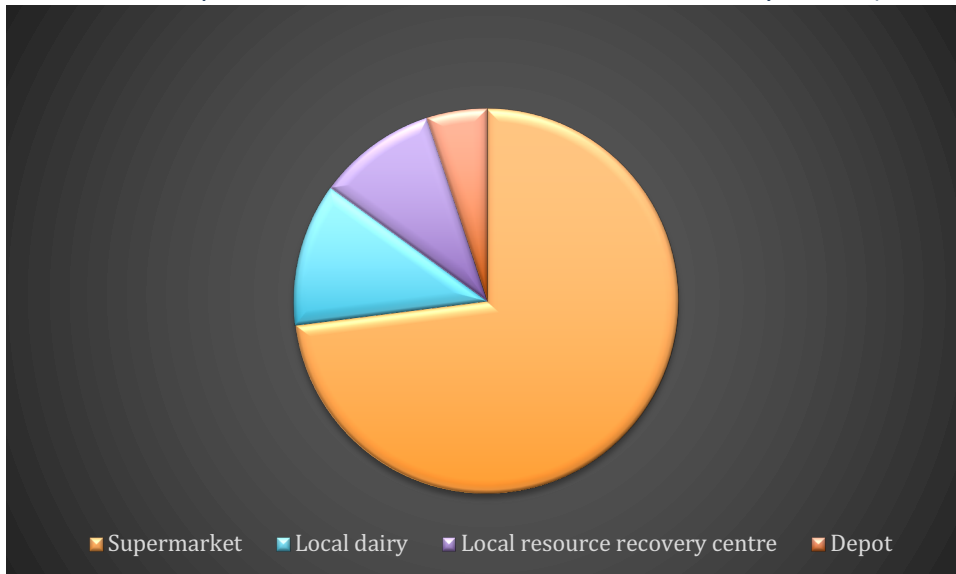
Consumers were asked about their preferences regarding return point locations. The question consisted of two parts:

1. What locations would you utilise to recycle your containers, and;
2. What location would you be most likely to use to redeem your container for a refund.

1. Refund point location's consumers would access



2. Refund point locations consumers would most likely utilise (i.e. most often)



For most (73%) consumers, refund points located at their local supermarket would be the preferred location to return their empty containers for recycling, though the research also suggests consumers may utilise smaller stores and resource recovery centres.

*\*Note: Around 30-40% of containers are consumed in various hospitality venues (restaurants, pubs, sports clubs, cultural venues and other outdoor entertainment facilities) and are largely expected to be recovered via non-supermarket, resource recovery centres and similar bulk recycling options.*

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