

Recycling Pulse 2020

Engaging Middle America in Recycling Solutions

Introduction and Methodology

Shelton Group fields regular studies to dig into American consumers' attitudes and beliefs around sustainability. This report explores the current American mindset on recycling solutions, including:

- Tracking consumer awareness of the plastic waste crisis
- Tracking expectations of brands and policymakers for solving the problem
- Exploring consumer understanding of the struggling recycling system and its impacts on behavior
- Determining impacts of the How2Recycle[®] labels (awareness, use, impact on behavior and attitudes)
- Understanding the impact of shifting recycling attitudes and beliefs on a selection of CPG style packaging

The report includes data and insights from four Shelton Group studies:

- Eco Pulse[®] Wave 11: Fielded in July of 2018, surveying a total of 2,012 U.S. respondents
- Waking the Sleeping Giant 2019: Fielded in March of 2019, surveying a total of 1,013 U.S. respondents.
- Recycling Pulse 2020: Fielded in March of 2020, surveying a total of 1,002 U.S. respondents.
- Eco Pulse[®] Wave 12: Fielded in May of 2020, surveying a total of 1,007 U.S. respondents.

For all 4 surveys, stratified sampling mirrors the U.S. population, using quotas for geography, age, gender, education and race; data were weighted slightly to match U.S. population distributions. Margin of error is +/- 3.1%.

Maslow's hierarchy of needs can help
us understand the unprecedented
moment we're all in



SELF-ACTUALIZATION

desire to become the most that one can be

ESTEEM

respect, self-esteem, status, recognition, strength, freedom

LOVE AND BELONGING

friendship, intimacy, family, sense of connection

SAFETY NEEDS

personal security, employment, resources, health, property

PHYSIOLOGICAL NEEDS

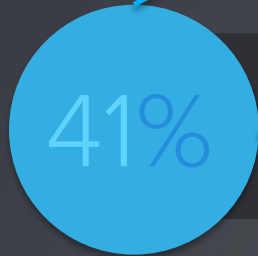
air, water, food, shelter, sleep, clothing, reproduction

We can't self-actualize if we're not getting basic needs met at the bottom of the pyramid; it's clear there's been a drop in our ability to self-actualize as compared to pre-COVID

SELF-ACTUALIZATION

desire to become the most that one can be

Pre-COVID



of us wanted to be seen as someone who buys green products.

Source: Eco Pulse[®] Wave 11 n=2,012

How much do you agree or disagree with the following statement: Buying/using eco-friendly products is an important part of my personal image

SELF-ACTUALIZATION

desire to become the most that one can be

Pre-COVID

41%

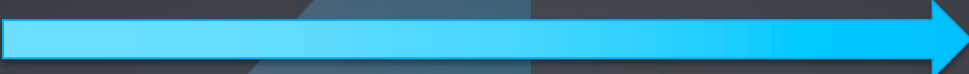
of us wanted to be seen as someone who buys green products.

25%

of us could cough up an example, unaided, of a brand we'd purchased or not purchased because of the environmental record of the manufacturer.

Source: Eco Pulse[®] Wave 11 n=2,012

But those numbers dropped during COVID as we became more distracted with basic needs further down the pyramid

Pre-COVID  During-COVID

41%

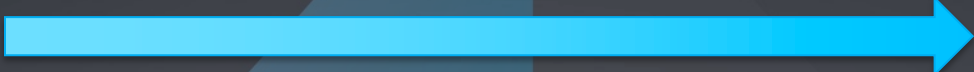
of us wanted to be seen as someone who buys green products.

33%



25%

of us could cough up an example, unaided, of a brand we'd purchased or not purchased because of the environmental record of the manufacturer.

Pre-COVID  During-COVID

41%

of us wanted to be seen as someone who buys green products.

33%



25%

of us could cough up an example, unaided, of a brand we'd purchased or not purchased because of the environmental record of the manufacturer.

20%

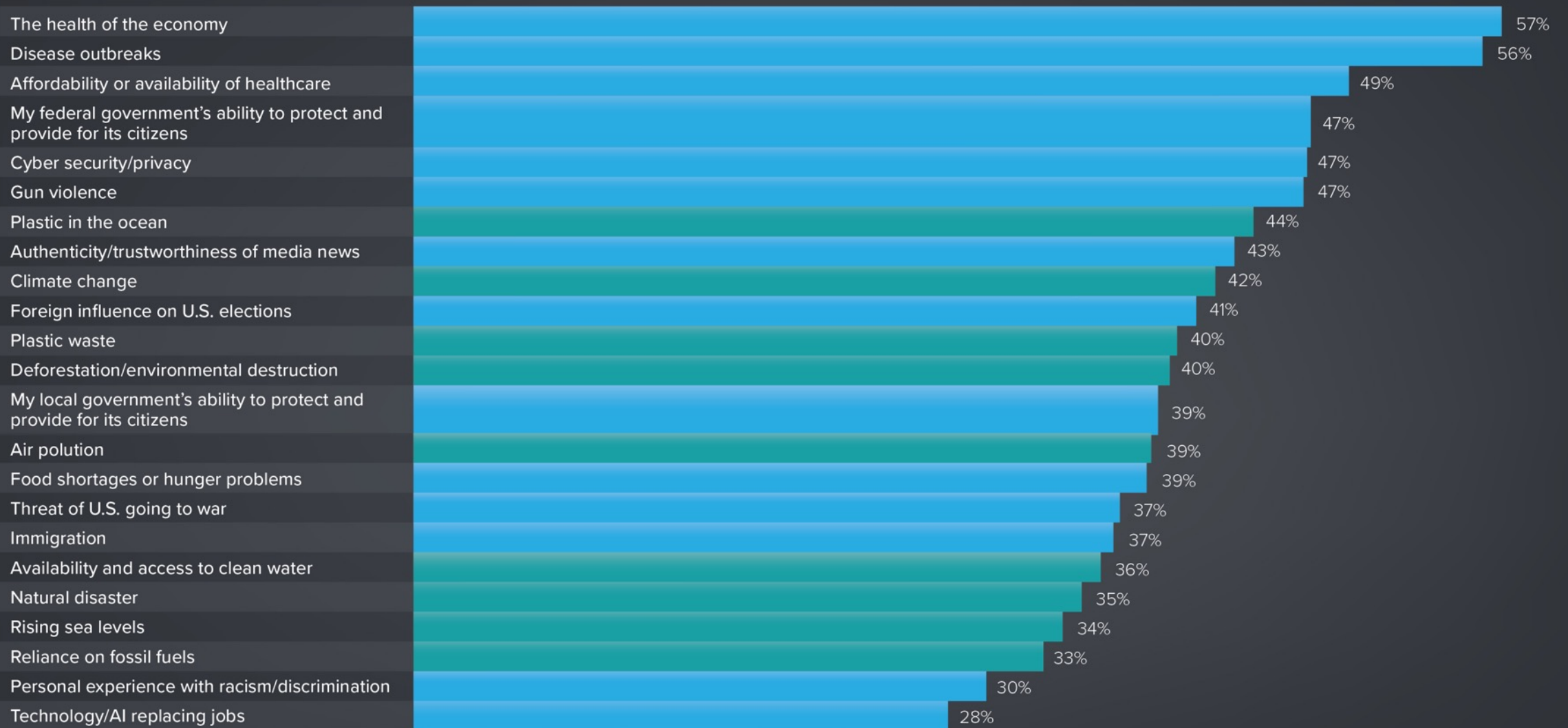


Source: Eco Pulse[®] Wave 12 n=2,012

In the rock-paper-scissors game of survival **we just can't take action on higher-level things** when we're worried about meeting our basic needs.

Basic needs have risen to the top of our concerns

% Extremely/Very Concerned



And in light of our concern over basic needs, it's not a surprise that environmental issues are taking a (temporary) back seat.

At the start of the pandemic in the U.S., concern over environmental issues held steady from 2019

% Extremely/Very Concerned

■ March 2020 ■ March 2019

Plastic in the ocean



Climate change



Plastic waste



Air pollution



Two months later, as basic health and well-being became our chief concerns, the picture looked very different...

% Extremely/Very Concerned

■ May 2020 ■ March 2020 ■ March 2019

Plastic in the ocean



Climate change



Plastic waste



Air pollution

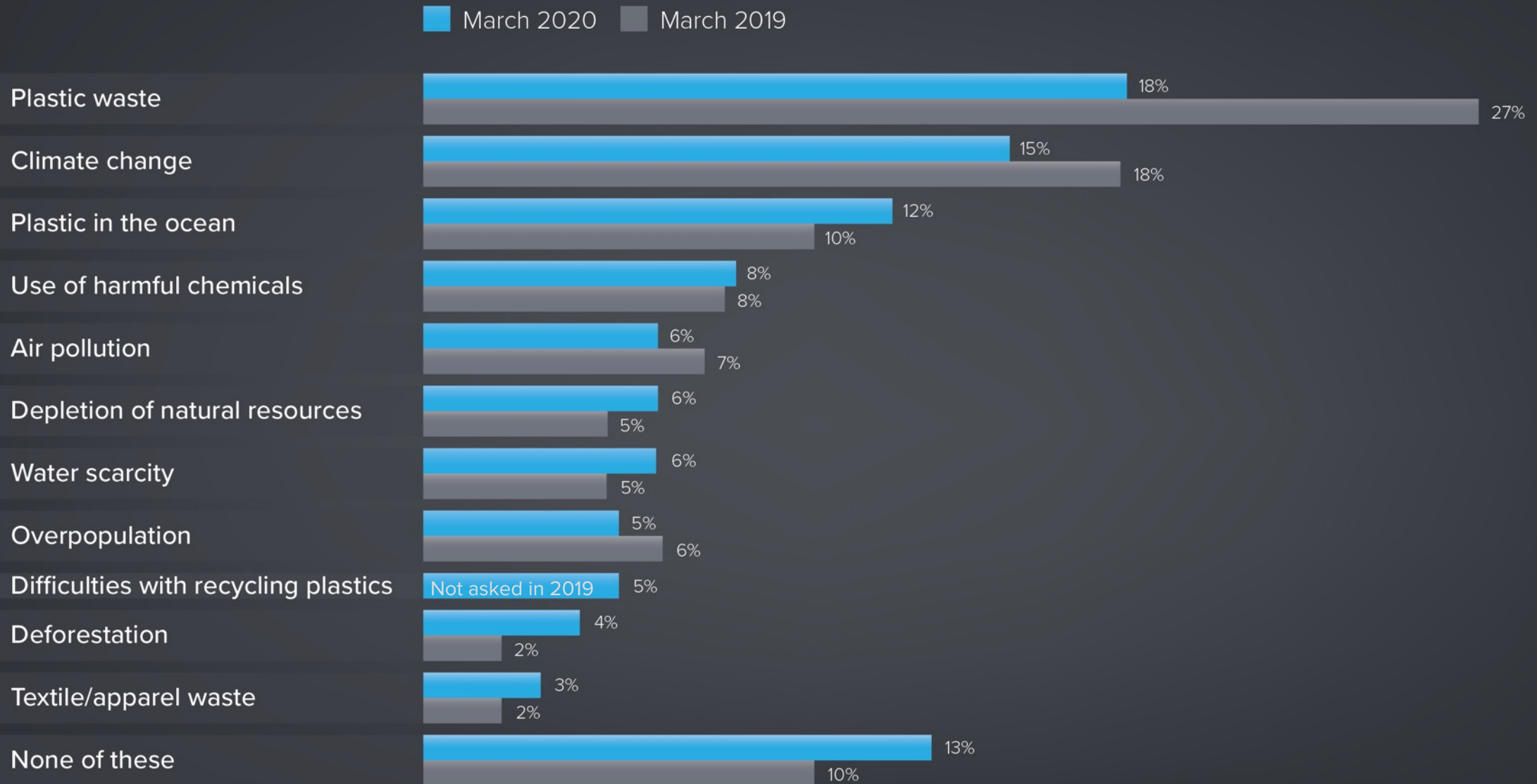


Think about it like this: we decided to take a cross-country road trip in a car with a transmission that's on its last legs. The whole time we're driving we're worried about the transmission failing. Then **all of a sudden, we get a flat tire**. Now we're not worried about the transmission anymore.

Coronavirus is the flat tire and once we can get it repaired and drive on it long enough to be sure it's not going to go flat again, we'll resume worrying about the bigger transmission issue – **the environment**.

For now, though, we feel disempowered and unable to do much about the environment.

For instance, the feeling 27% of us had last summer that we could personally do something about plastic has backslid in a major way, down to 18%



Not surprisingly, then, we're less activated on trying to avoid single use plastics.

- Last year 1/3 of Americans fell into the “Activated” segment, meaning we were informed about, and actively trying to reduce the use of, single-use plastics.
- As of March 2020 only a quarter of us fell into that same category.

ACTIVATED

2019

3

4

%



-

2020

2

4

%

So we're momentarily much more "asleep" when it comes to issues related to the environment

- Remember that so much of the outrage about plastics in the ocean is the fact that plastics are now in our food stream, so **it's a human health issue**. We now have a **more pressing, immediate human health issue to deal with** – as well as a pressing social equity crisis and economic crisis – so we've become less activated on single-use plastics.
- In fact, you might say that the **Great Awakening** of our massive systemic issues – spurred by COVID-19 and the murder of George Floyd – has distracted us from thinking as much about the environment, for now.

ASLEEP

2019

3

1

%



-

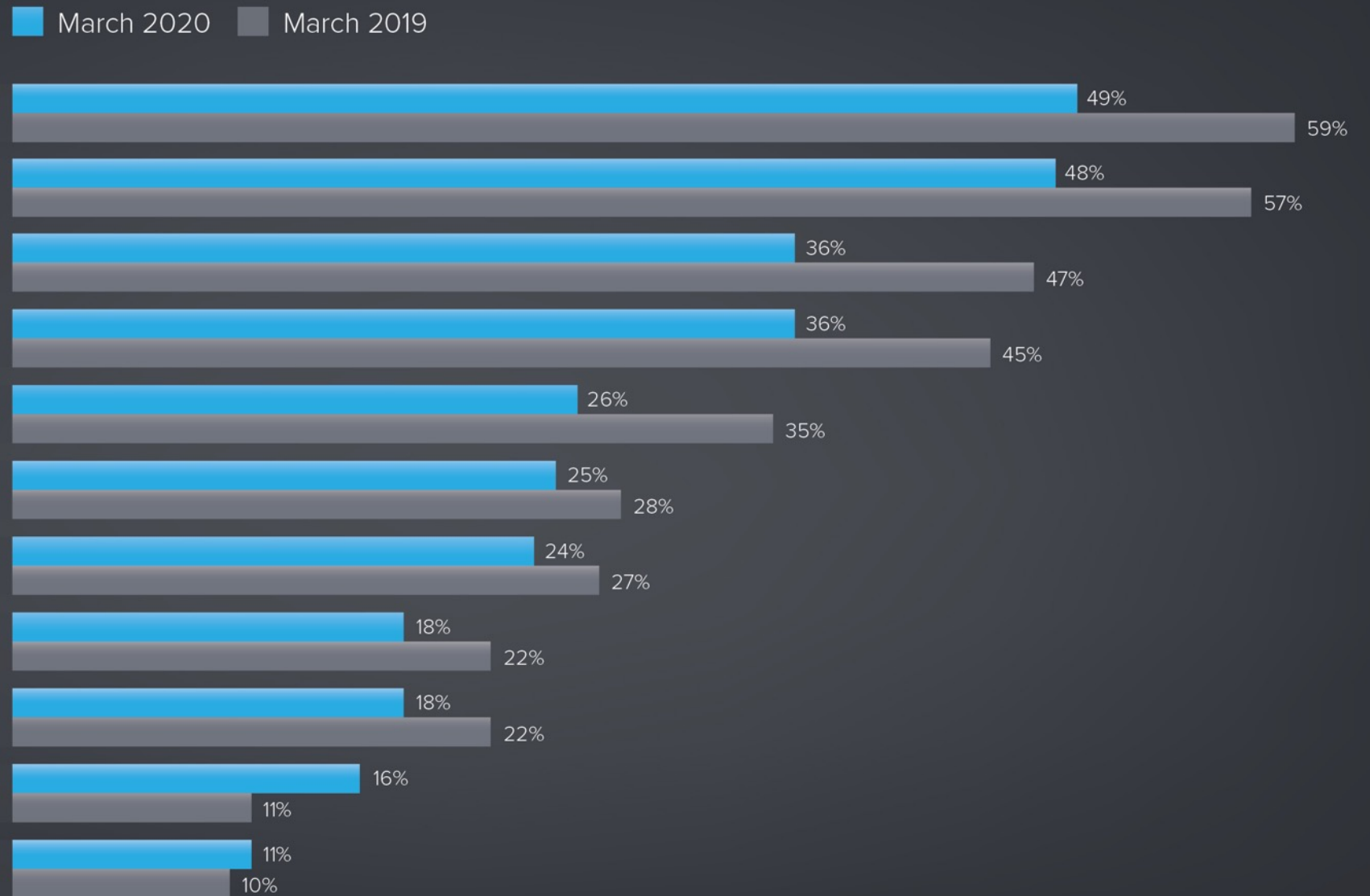
2020

4

2

%

With all the noise about the economy, coronavirus, politics, etc. we're all hearing less about all these environmental issues



AWARENESS OF SUP BANS

2019

63%



-

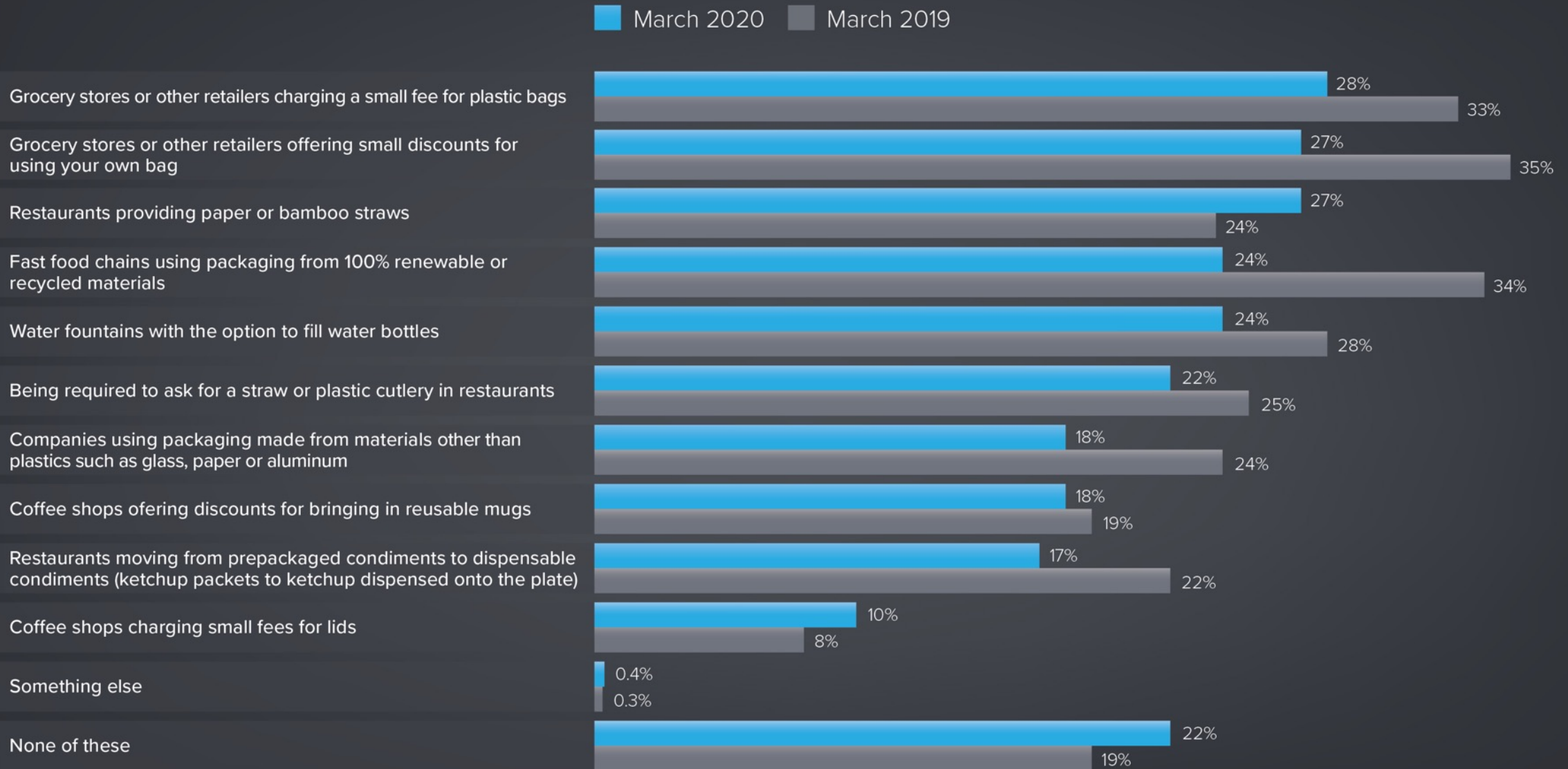
%

2020

54%

%

And we're noticing **less** action from companies at point-of-sale



So, there's something to be said for continuing to communicate about environmental issues, and there's something to be said for demonstrating the behaviors you want people to adopt – both have a correlated impact on consumer action.

And, again, it's going to be hard to motivate action on our environmental transmission while we've got an economic and health-related flat tire.

What does this mean for

RECYCLING?

- What do we know about the state of the recycling system?
- And what are we willing to do about it?

... and bad news

There's good news ...



In the good news column...

80%

agree recycling is the bare minimum we can do for the environment

76%

agree recycling makes us feel better about purchases

Since it makes us feel better,

Shelton^{Grp}

72%

of us say we recycle via a curbside pickup service.

So we're "in" on the current system of throwing stuff in the blue bin and rolling it to the curb.

Additionally, only

30%

have heard about some cities
discontinuing curbside
recycling programs

10%

say our curbside recycling
services have been
discontinued

About a third of us are aware something's going on with our recycling system, but **the vast majority of us are happy to keep going with our curbside guilt-assuaging approach to waste management.**

Source: Recycling Pulse 2020 n=1,002

Have you heard the news about some cities no longer offering curbside recycling? 30% T2B

How much do you agree or disagree with the following statement: 76% say "recycling makes me feel better about the amount of things I purchase or consume"

So while

Shelton^{Grp}

1/3

of us have made changes to reduce the amount of single use plastics we buy...

...we still believe plastic is the number one easiest material to process into a substance that can be used to make a new product or packaging.

And although

Shelton^{Grp}

40%

correctly answer that plastics coded number 1, PET, are the easiest for recycling centers to process...

38%

...of us have no idea which number is easiest to recycle and the remainder of us answer incorrectly.

We're opinionated about plastics, but blissfully ignorant about them, and we let ourselves off the hook because of the current curbside system.

How does this change when our recycling system struggles?



Half of us have heard at least a little about other countries no longer accepting excess recycling from the US

Yes, I've heard a lot about it

18%

Yes, I've heard some about it

21%

Yes, I've heard a little about it

12%

No, I haven't heard about it

50%

But 97% of us who have heard of international bans on accepting US waste say that hasn't caused us to recycle less

I am recycling more than I used to

41%

It has not changed my recycling habits

56%

I am recycling less than I used to

3%

Source: Recycling Pulse 2020 n=503

[If Yes have heard about in B12] How, if at all, has the information about other countries no longer accepting the United States' excess recycling impacted your household recycling habits?

And half of respondents who've heard of international bans on accepting US waste say it hasn't affected our purchase habits either

I am more likely to buy items that I know are recyclable

39%

It has not changed my purchasing habits

50%

I no longer care if the items that I buy are recyclable

6%

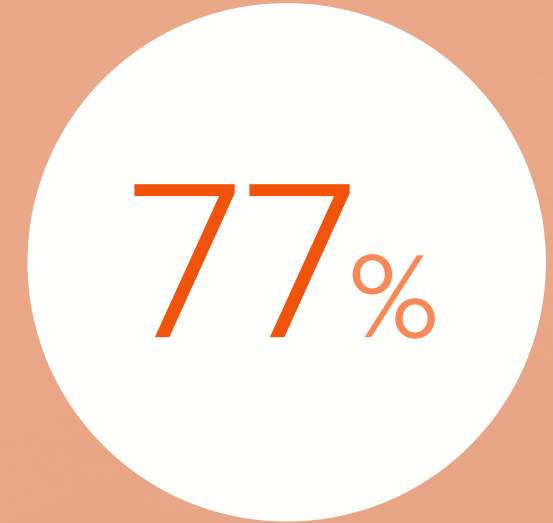
I'm not sure how to know what items or packaging I buy is actually recyclable

4%

Source: Recycling Pulse 2020 n=503

[If Yes have heard about in B12] How, if at all, has the information about other countries no longer accepting the United States' excess recycling impacted your purchasing?

Overall,



of us believe that what we put in the bin actually gets recycled.
(Though it's worth noting that's down from 86% last year.)

In other words, we're still chucking waste in the bin with few worries about whether it's actually being recycled.

Let's look at this as good news

- The waste management and consumer packaged goods industries have worked HARD to get us all to **adopt recycling behaviors** and to adopt the idea that it's the bare minimum we can do for the environment.
- And it's sticking...in fact, we're **clinging to it**.
- The last thing the environment needs is for us to **throw in the towel**...which is what we're doing in places where curbside has been discontinued.

Of the 10% of us whose curbside recycling has been discontinued, 56% have **stopped recycling altogether**

I take my recycling elsewhere to be recycled



44%

I don't recycle anymore



56%

So, to engage Americans in recycling, here's what needs to happen:



So, to engage Americans in recycling, here's what needs to happen:



1

We need to continue communicating about – and demonstrating action on – plastic waste

Remember, we're all hearing less about environmental issues and noticing fewer bans on plastic waste and fewer actions taken by retailers and restaurants on plastic waste...and that has a direct correlation to our own awareness and action. We need to keep the steady drumbeat of communications and action going if we want to bring people along.

So, to engage Americans in recycling, here's what needs to happen:



1

We need to continue communicating about – and demonstrating action on – plastic waste

2

We need to continue our curbside programs and make them really work

When these go away, we will see a massive backslide in recycling behaviors. This means we need to ensure that our system works, and that what gets thrown in the bin actually gets recycled – so we need to implement chemical recycling programs as fast as possible.

Given that will require massive infrastructure changes, as a stop gap, we need to:

So, to engage Americans in recycling, here's what needs to happen:



1

We need to continue communicating about – and demonstrating action on – plastic waste

2

We need to continue our curbside programs and make them really work

3

Teach them to “look before they toss”

Only 22% actually look at the label on an item to see if it's recyclable before chucking it in the recycling bin. Most haven't noticed the new How2Recycle[®] label or find it too hard to read. We need a massive campaign on this.

So, to engage Americans in recycling, here's what needs to happen:



1

We need to continue communicating about – and demonstrating action on – plastic waste

2

We need to continue our curbside programs and make them really work

3

Teach them to “look before they toss”

4

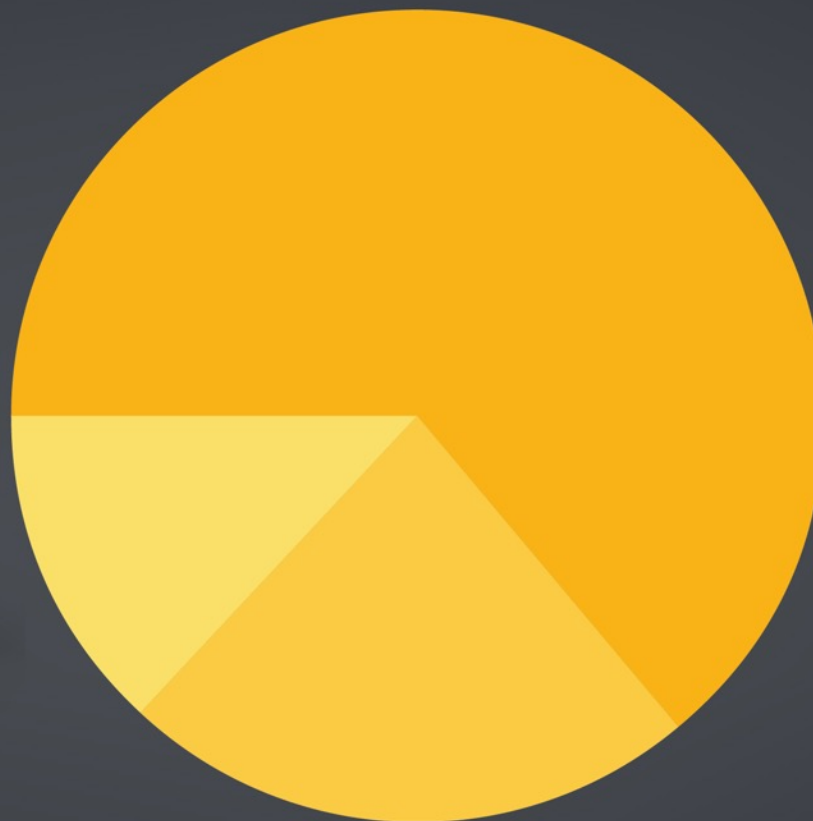
Teach them what's actually recyclable

Back to the earlier point, many of us feel bad about using single use plastics, so the tactic for assuaging our guilt is to throw everything into our bins. That means we're throwing a lot of things in that aren't actually recyclable...which is rooted in a pretty big lack of understanding of what's actually recyclable.

Let's take a look at some common recycling mistakes we're making

Although this chip bag isn't recyclable, 36% of us believe some or all of it is

When this package is empty, would you...



64% ✓

Put the entire package in the trash can

23% ✗

Put the entire package in a recycling container

13% ✗

Put parts of it in the trash can, and parts of it in the recycling container

There's no right answer for the juice box; about 63% of communities have facilities for recycling it, but it's not consistent



When this package is empty, would you...



43%

Put the entire package in the trash can

47%

Put the entire package in a recycling container

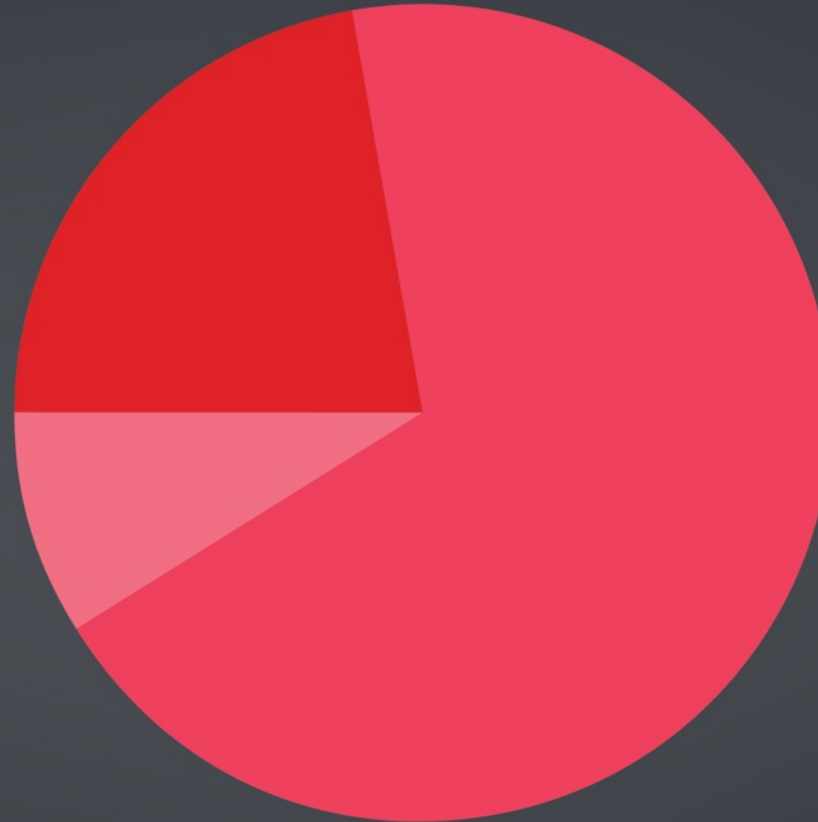
10%

Put parts of it in the trash can, and parts of it in the recycling container

91% of us got this wrong...



When this package is empty, would you...



22% ✘

Put the entire package in the trash can

69% ✘

Put the entire package in a recycling container

9% ✔

Put parts of it in the trash can, and parts of it in the recycling container

Bottom line: we're not great at checking the recycling labels before we discard an item

I never look for the label before discarding an item

33%

I sometimes look for the label before discarding an item

45%

I always look for the label before discarding an item

22%

How to engage middle America in recycling solutions

- Understand that the focus now is the economy and the virus
- Keep awareness of waste issues and action needed front of mind
- Continue curbside recycling
- Advance the recycling system so everything in the bin gets recycled
- Teach Americans to look before they toss

What we need to do

- If you're not already familiar with the How2Recycle[®] Label, go here: <https://How2Recycle.info/>
- Sign up for our newsletter for ongoing insights: sheltongrp.com

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