

THE STUDY

Circular Economy: Understanding, Willingness to buy & Perception.

Environmental and climate protection are becoming ever more important. Circular economy and recycling are two important topics in this context. They affect the capability and costs of packaging production more than ever. But what do consumers understand by circular economy and recycling? How expensive may plastic packaging such as plant pots made of recycled material obtained from the yellow bag or comparable household waste management systems be? Which ecolabels and certificates do consumers trust?

To answer these and other questions, the independent Bremen-based market research institute “konkret” was commissioned to conduct a representative survey. Here you will find the results.

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Method

Method and random sample

Data collection:

Standardised online interviews (CAWI – Computer Assisted Web Interview)

Questionnaire duration:

average 7.57 minutes

Survey period:

17/08/2020 – 27/08/2020

Respondents:

1003

Target group

- German citizens aged 18 and over
- Buy flowers / potted plants occasionally

Random sampling procedure

- Selection from the konkret Online panel and the KANTAR Lightspeed panel
- Pre-definition of quotas to be achieved at German federal state level (according to population distribution)

Random sample	n = 1003
Federal state	
Baden-Württemberg	13 %
Bavaria	15 %
Berlin	4 %
Brandenburg	3 %
Bremen	1 %
Hamburg	2 %
Hesse	8 %
Mecklenburg-Western Pomerania	2 %
Lower Saxony	10 %
North Rhine-Westphalia	22 %
Rhineland-Palatinate	5 %
Saarland	1 %
Saxony	5 %
Saxony-Anhalt	3 %
Schleswig-Holstein	4 %
Thuringia	3 %

Random sample		n = 1003	
Age		Education	
18 – 29	13 %	University	32 %
30 – 49	38 %	Higher secondary	25 %
50 – 65	33 %	Secondary / lower secondary school leaving certificate or similar	43 %
66 +	17 %	No school leaving certificate	1 %
Sex		Net household income*	
Female	55 %	Less than € 1,000	8 %
Male	45 %	€ 1,000 – 1,500	10 %
diverse	0 %	€ 1,500 – 2,500	21 %
		€ 2,500 – 3,500	23 %
		€ 3,500 – 4,999	22 %
		€ 5,000 and more	10 %
Lifestyle			
Single	28 %	Single parent	5 %
Couples	40 %	Other	10 %
Families	17 %		

* missing % = not specified

Conclusion

Recycling: Attitudes & Understanding

Processing waste from household recycling collections (“gelber Sack”, i. e. yellow bag in Germany) is clearly considered the “correct” way of recycling.

When asked about the different types of recycling, 65 % say that packaging made from packaging waste originating from the yellow bag, which is processed by sorting, washing and remelting, best meets their expectations of recycling. Only 12 % choose packaging made from processed industrial production waste.

65
percent of respondents understand recycling as being packaging produced from packaging waste originating from the yellow bag, which is processed by sorting, washing and remelting

12
percent of respondents choose packaging made from processed industrial production waste

62 % of respondents find that this recycled packaging originating from the yellow bag is considered sustainable and good for the environment. Clearly, these attributes are most associated with this type of recycled packaging.

62
percent of respondents feel that recycled packaging originating from the yellow bag is sustainable and good for the environment

After all, it is primarily the manufacturers of packaging materials who are seen as being the ones responsible for making sure that these can be recycled successfully. For 36 %, they are considered to be chiefly responsible. However, 21 % also see the manufacturers of packaged products and consumers themselves as being responsible.

36
percent of respondents see the manufacturers of packaging materials as having a responsibility to make sure that recycling takes place successfully

The majority of respondents (58 %) consider tax on packaging that is not made of recycled material to be useful.

58
percent of respondents are in favour of a Plastic tax

Plant pots: Preferences & Willingness to buy

Even plant pots should be made of processed waste originating from the yellow bag. Consumers are also prepared to pay an extra charge for this.

- In line with the widespread notion of “correctly” recycled packaging, even with plant pots a clear majority (62 %) of respondents prefer material consisting of processed waste originating from the yellow bag, which is sorted, cleaned and remelted.
- Consumers are also prepared to pay an extra charge for a plant pot produced in this way:

89
percent

are ready to pay 2 cents more.

73
percent

of respondents would pay
up to 10 cents more.

Perception: Ecolabels / Certificates

The 'Blue Angel' is the best known label – and also the most trustworthy.

- 96 % of respondents say they have at least heard of the Blue Angel. 64 % also have a notion of its importance as a sign of environmental sustainability.
- Finally, from a consumer perspective, labels are also a key means of making it clear to consumers at the point-of-sale that a plant pot is made of recycled material.

96
percent

of respondents have already
heard of the Blue Angel.

64
percent

of respondents also know what
Blue Angel stands for.

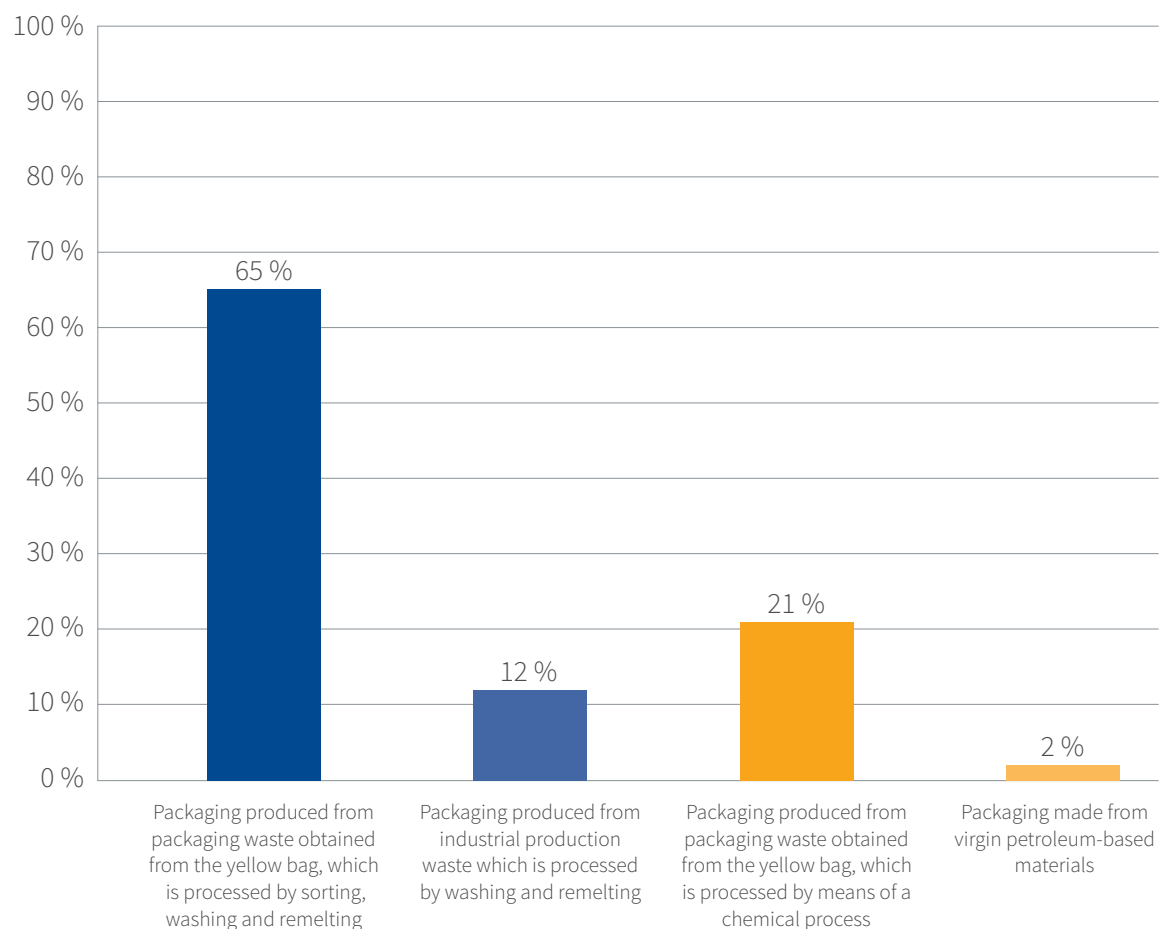
Recycling: Attitudes & Understanding

Recycling process

The absolute majority of those surveyed – 65 % – associate recycling primarily with the reprocessing of packaging originating from the yellow bag by sorting, washing and remelting it. The use of industrial production waste to produce new packaging is much less in line with consumer perceptions.

Which of the types of packaging described below corresponds most closely to your idea of recycling / circular economy?

Basis: All respondents, n = 1003

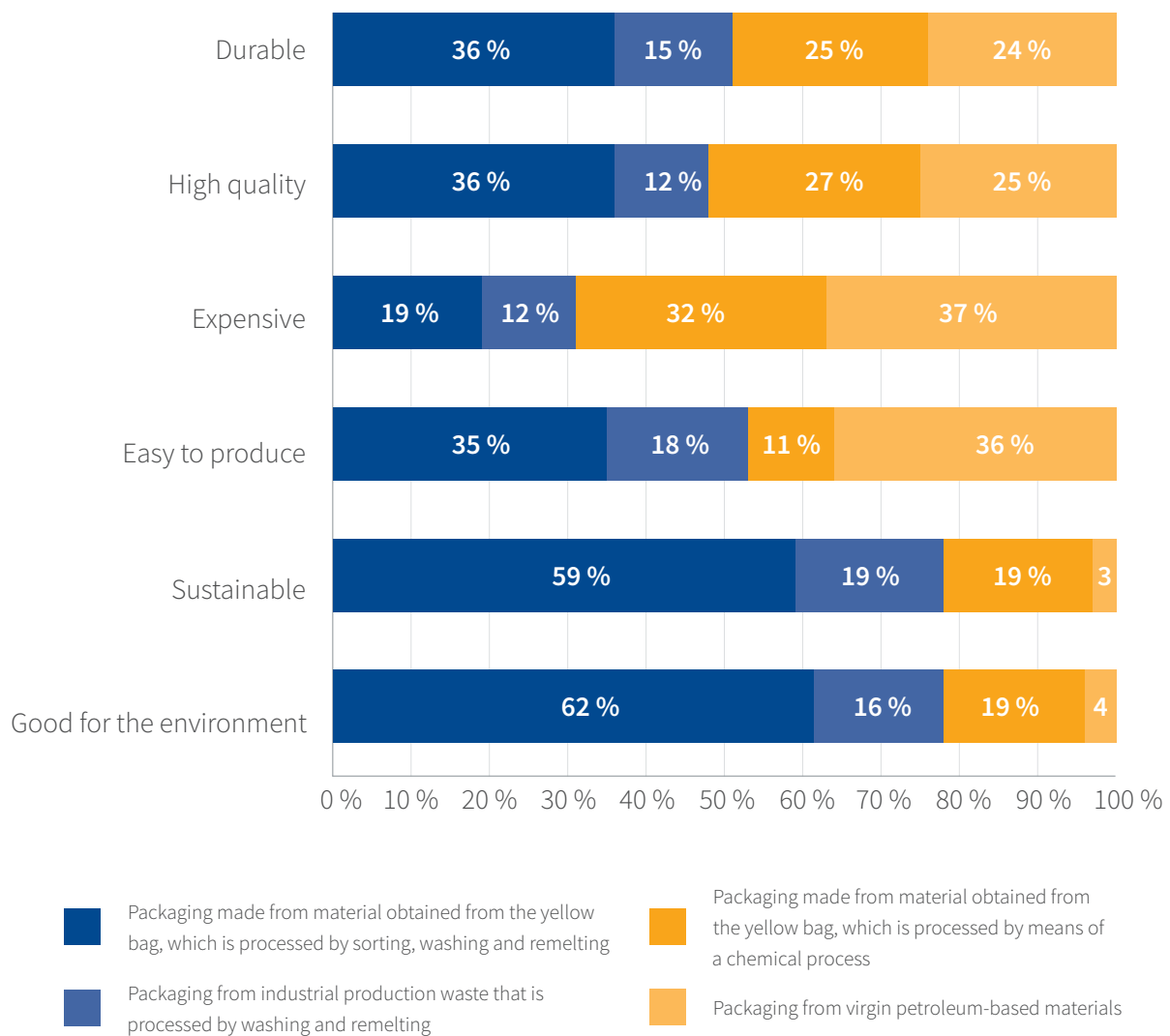


Perception: Recycling types

Reprocessing materials from the yellow bag are considered to be positive for the environment.

To which of the types of packaging mentioned above does the following concept best apply?

Basis: All respondents, n = 1003

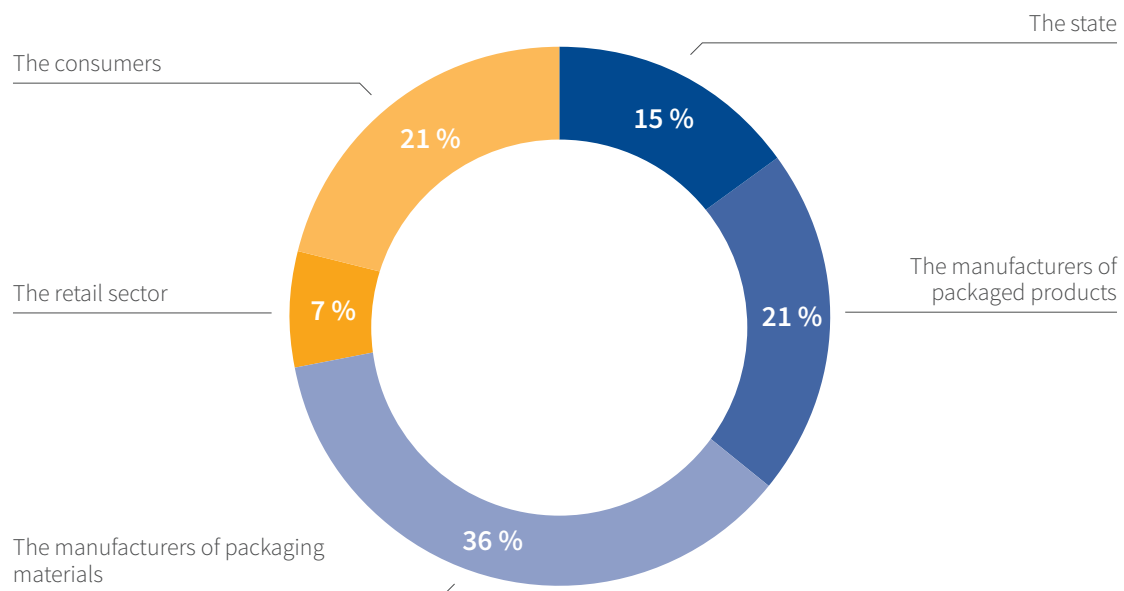


Recycling responsibility

The majority (36 %) believe that manufacturers of packaging materials have a responsibility to create the conditions for successful recycling. Even manufacturers of packaged products and ultimately consumers are considered responsible (both 21 %).

Who do you think is most responsible for ensuring that packaging materials can be successfully recycled?

Basis: All respondents, n = 1003

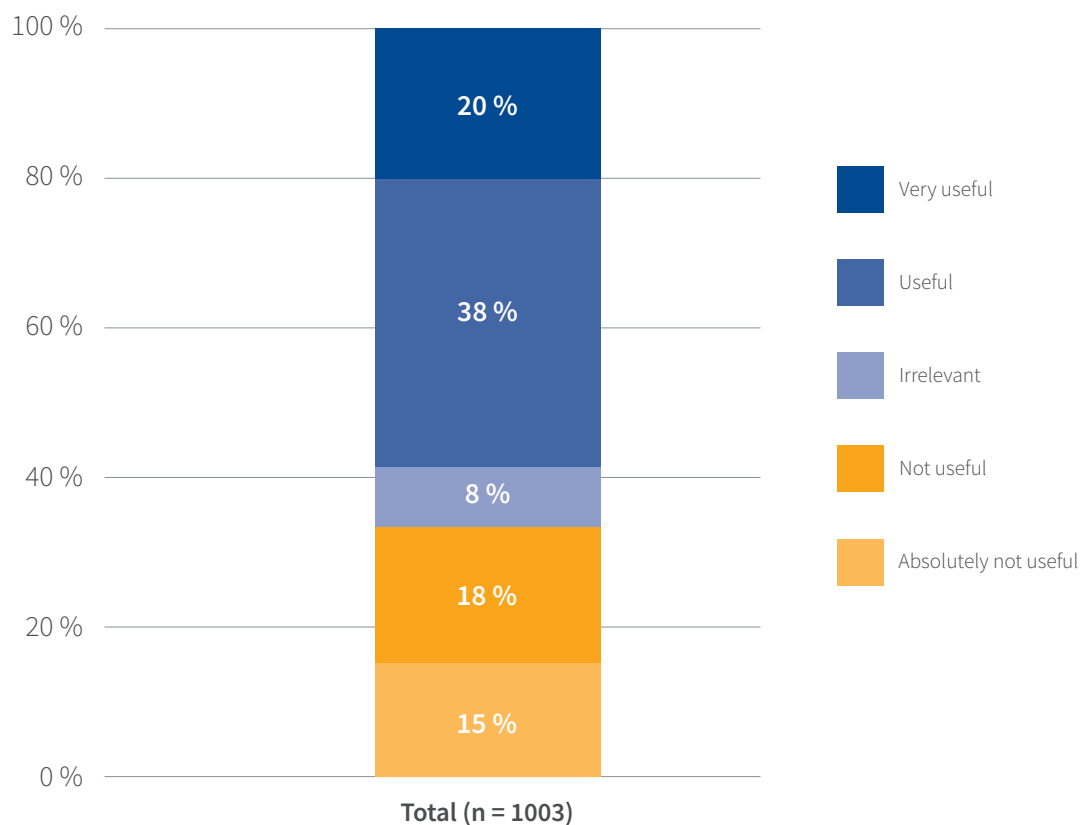


Plastic tax

The majority (58 %) mainly voted in favour of a tax on packaging materials made from non-recycled material.

I think that a financial contribution, for example in the form of a tax on packaging which is not made from recycled material is ...

Basis: Respondents who gave a rating, n = 1003



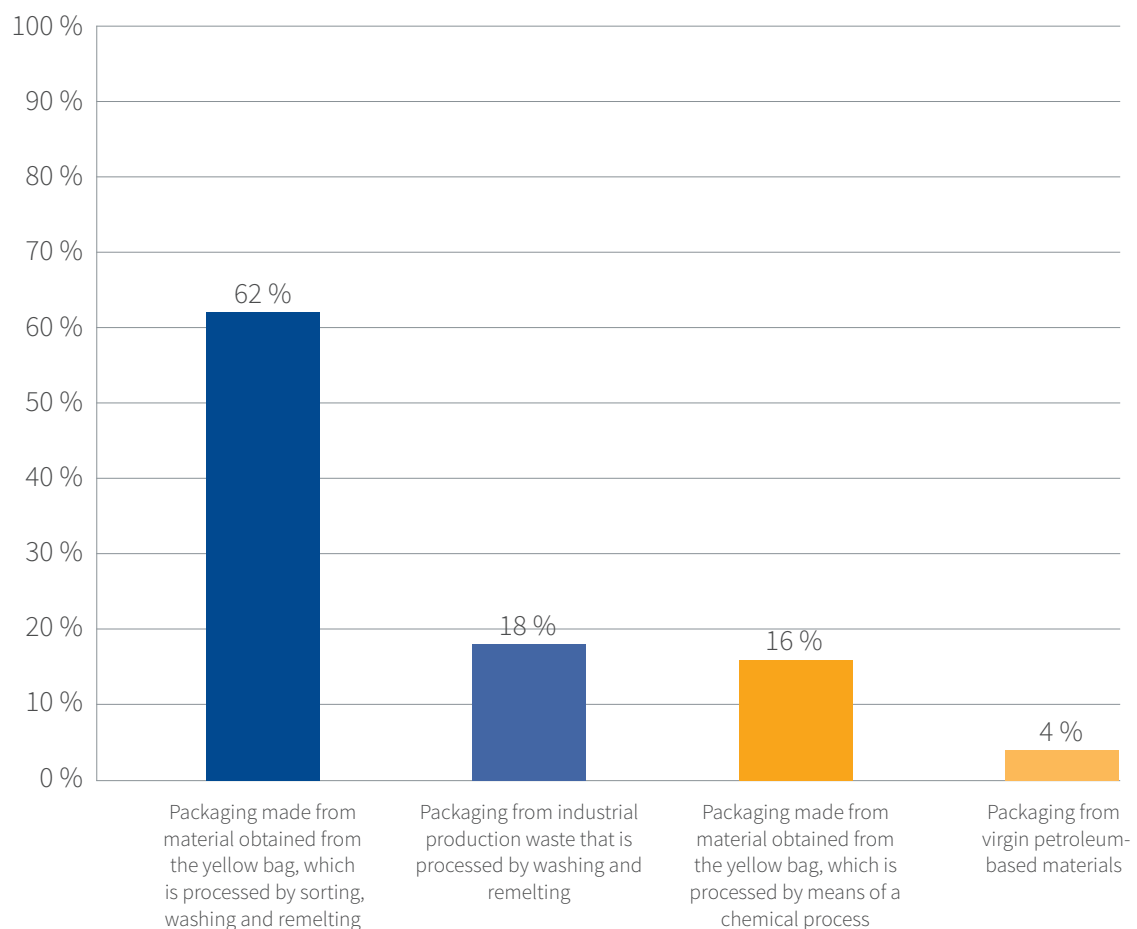
Plant pots: Preferences & Willingness to buy

Preferences

Most respondents would opt for a plant pot made from recycled waste obtained from the yellow bag, which was recycled by remelting, if the price is not higher. As seen above, this comes closest to the idea of “correctly recycled packaging”.

Suppose you wanted to buy a flower / potted plant, but you had the possibility to choose between different types of plant pots at the same price.

Basis: All respondents, n = 1003

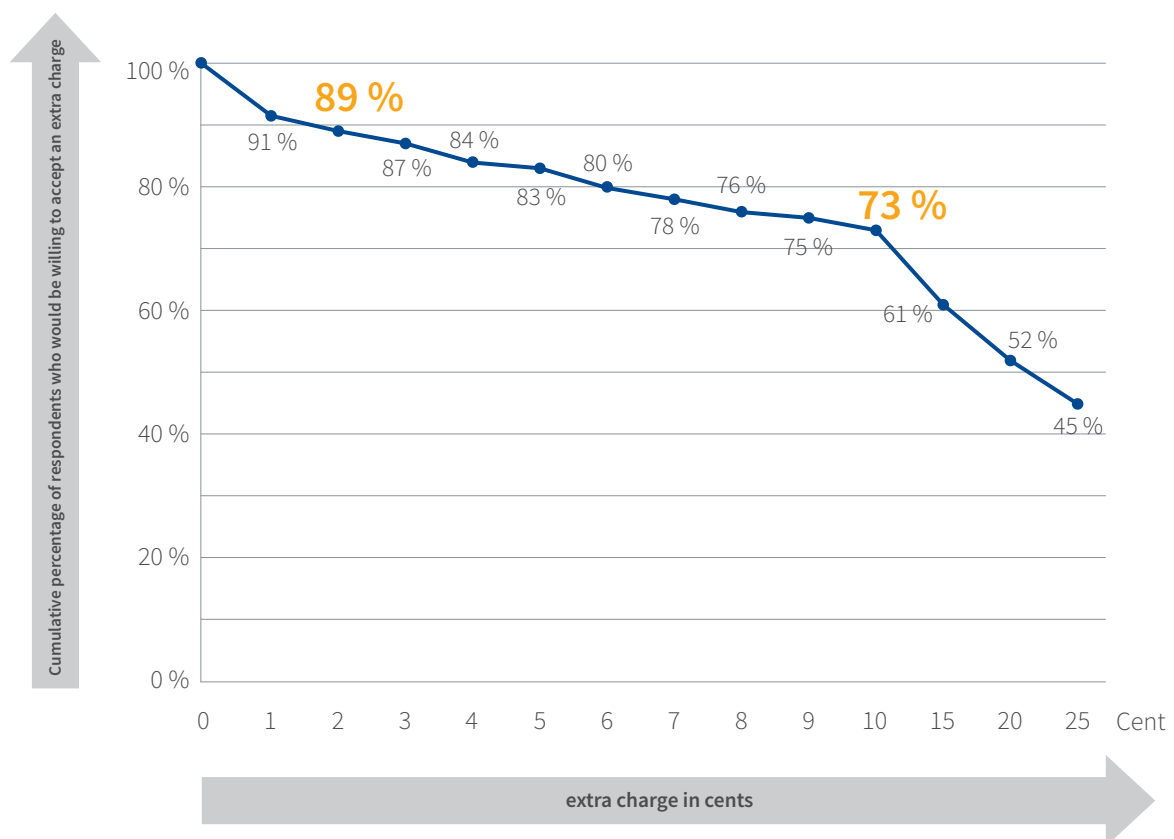


Willingness to buy

Finally, a certain willingness to pay more for a “correctly recycled” plant pot can also be observed. Over 70 % would be ready to pay up to 10 cents more.

Would you be willing to pay more for a “plant pot made from packaging waste obtained from the yellow bag, which is processed by sorting, washing and remelting”?

Basis: All respondents, n = 1003



Perception: Ecolabels / Certificates

Recognition

The Blue Angel is clearly the best known of the labels considered. The majority (64 %) know what the label stands for. Over 90 % have at least seen it before.

We are now showing you a range of labels / certificates which can also be relevant when buying flowers / potted plants. Please indicate to what extent you are aware of these labels / certificates.


Basis: All respondents, n = 1003




www.blauer-engel.de/uz30a



 I know it and know what it stands for

 I have seen it before, but do not know what it stands for

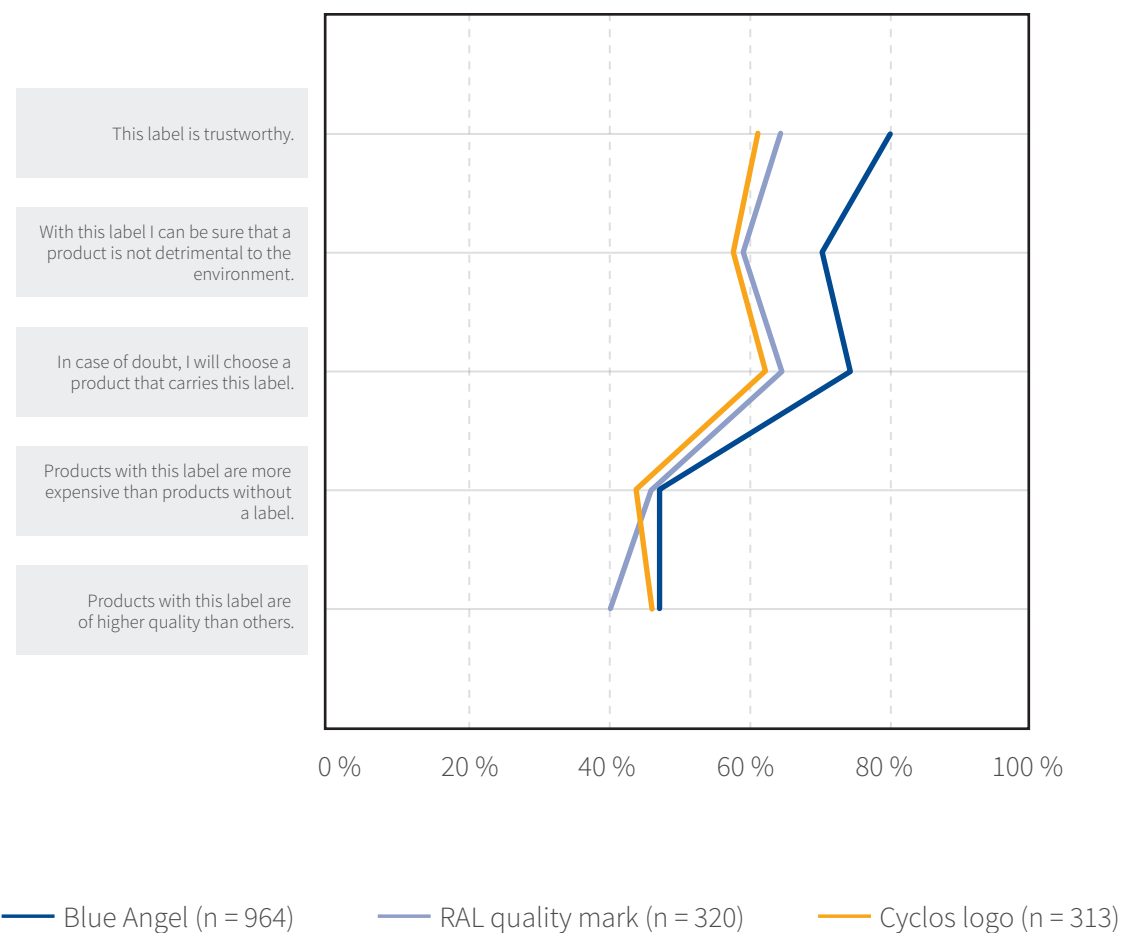
 I do not know it

Perception

Above all, the Blue Angel is considered to be a trustworthy and reliable symbol of environmental friendliness.

In your opinion, to what extent does the following statement apply to the labels / certificates currently shown?

Basis: People who know the label

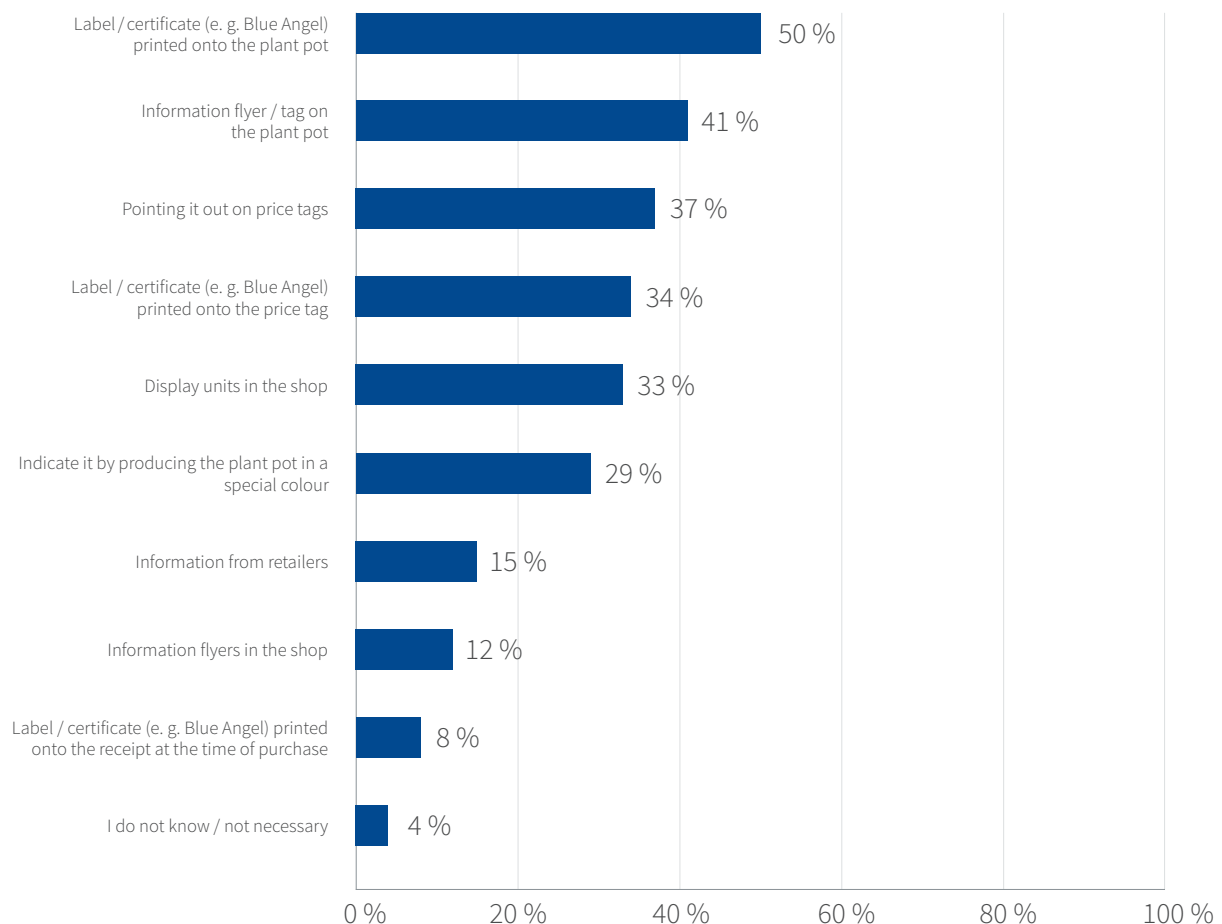


Arranging recycling at the POS

In the opinion of the respondents, plant pots should provide information about the material of the plant pot. Preferably through a label stuck on the plant pot or by means of an information tag with notes about the material placed on the plant pot.

In the case of plant products, what do you think is the best way to indicate that the product is being sold in a plant pot made of recycled material?

Basis: All respondents, n = 1003



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