2022 RESIDENT MESSAGING SURVEY FINDINGS SUMMARY

BACKGROUND AND PURPOSE

In September of 2022, the Foodservice Packaging Institute (FPI) conducted a web-based consumer survey with a focus on recycling of foodservice packaging (FSP). The main purposes of the survey were to understand: (1) what assumptions residents are making about the recyclability of FSP, (2) what sources of information and campaign methods are most effective in educating residents about recycling FSP, and (3) how behavior and assumptions differ between FPI Community Partnership (CP) regions and non-CP regions. This summary highlights some of the key findings.

METHODOLOGY

The online survey was developed by RRS and was completed by 1,042 vetted panel respondents consisting of U.S. residents at least 18 years of age. The survey collected input from a nearly even distribution of respondents who reside in FPI community partnership areas (n = 517) and non-community partnership areas (n = 525). The survey responses reflect a distribution of demographics that are roughly representative of the U.S. population taking into consideration age and housing status. Data analysis was conducted by RRS.

KEY FINDINGS AND RECOMMENDATIONS

GENERAL FINDINGS:

- **First-sought information:** When respondents were asked where they look to first when trying to figure out if something is recyclable, nearly two-thirds of respondents look to the package first (either recycling instructions or the presence/absence of a recycling symbol). The second most popular approach is referring to information directly from the recycling program.

- **Relied-upon Information:** When asked to rank different information sources, the most relied-upon source was reported to be the signage on the recycling cart or bin, closely followed by information on the city, county, or recycling company's website.

- **Frequency of recycling:** A significant portion of residents still don't recycle. Nearly fourteen percent (13.5%) of respondents said they never recycle, and 10% said they recycle very infrequently.

- **Decision to recycle:** Responses to multiple questions suggest that material (i.e., whether the item is made from a material that is accepted) plays a greater role than form (i.e., whether the type of product, such as a cup or box is accepted) in a resident's decision to recycle an item.

- **Impact of news:** The residents that have seen more news related to recycling overwhelmingly (82%) said that they do make more of an effort to recycle due to recent information. This suggests that news about recycling favors recycling efforts.

- **Baseline awareness on traditional items:** Eighty-three (83%) of respondents recognize aluminum cans and PET bottles as being recyclable in residential programs.

FINDINGS SPECIFIC TO FOODSERVICE PACKAGING:

- **Paper cups:** Overall, 75% of respondents indicated they would recycle a paper cup. The most common rationale for recycling the cup was that it is made of paper (~18%), followed by the cup form (~8%). This suggests a greater reliance on material than on form for making a recycling decision.

- **Plastic cups:** As long as other types of plastic containers are pictured and if no cups are shown on a sample recycling program flyer, the overwhelming majority of residents (over 90%) would recycle a plastic cup. Most respondents base their decision to recycle the plastic cup either on the inclusion of "plastic containers" on the flyer (34%) or on the fact that the cup is made of plastic and plastic items are shown on the flyer (33%). This also suggests that material plays a greater role than form in a resident's decision to recycle an item. It also suggests that most residents consider a cup to be a type of container.

- **Molded fiber drink carriers:** The vast majority (90%) of respondents said they would recycle a molded fiber drink carrier when presented with a sample recycling guidance brochure picturing an egg carton but not a drink carrier. This may suggest that residents will respond strongly and positively with regard to recycling behavior if they are shown educational materials that show images of item(s) that look similar to the ones they are sorting in the real world. It is also consistent with findings on paper and plastic cups suggesting that residents primarily rely on the material in deciding whether an item is recyclable or not.

RECOMMENDATIONS FOR FPI'S RECOVERY WORK:

- **Grouping of recyclables:** When designing messaging around recyclability, a campaign should consider communicating important information about both material and form factor, ideally showing both material types and forms. If a specific form of material is an exception to the rule of recyclability, the campaign should consider highlighting that, to avoid confusion and incorrect assumptions by the public. Between material and form factor, it may be more effective to emphasize material type in resident messaging about recycling, for example in grouping recyclables by material on recycling flyers, and in using "paper cup" rather than "coffee cup" or "beverage cup." This could aid in recall and correct recycling behavior by referring to the categorizations that are most relevant or intuitive to the resident.

- **Importance of education:** When it is not possible to increase education via the package itself, and for items that do not meet the threshold to be labeled as widely recyclable, clear educational programs are especially important. This points to the importance of explicit messaging (i.e. specifically depicting or listing these items as accepted rather than relying on catch-all categories such as "containers" to help increase awareness and prompt recycling behavior).

- **Preferred information sources**: The program website is considered authoritative and is easiest and inexpensive to keep up to date as program rules change. The most relied-upon source, on-cart signage, requires a considerable investment to update and install but may have the greatest impact as it is durable, visible during the act of recycling, and cannot be misplaced. For the respondents who recycle only "sometimes," the preferred information sources are also signage and the program

website. Campaigns should utilize both of these communication tools to maximize effectiveness. Magnets, brochures, search tools, and social media would still be used by some portion of residents, but might be considered less of a priority, especially if budget is limited.

- **Clean and empty:** A greater proportion (by approximately 8 percentage points) of respondents from FPI Community Partnership regions reported that they would empty the liquid out of a cup before recycling it, which suggests that CP messaging on "clean and empty" has a positive impact on stated behaviors. Continued messaging on "clean and empty" for all container recycling is important and will likely be effective over time.

- **Target audience:** Messaging campaigns may have a greater impact if they target residents 53 years and younger. Campaigns should also carefully consider the pros and cons of targeting the roughly 13% of the population that rarely or never recycles.