

Center for Sustainable Behavior & Impact

2022 Foundational Audience Segmentation Research

5 Recycler Portraits Reveal the Importance of Moving Beyond the 'One-Size-Fits-All' Approach to Public Engagement

Why This Matters

The success of recycling depends on the small, everyday actions of hundreds of millions of people across the country. And it's no surprise that people's recycling performance varies significantly due to diverse beliefs, barriers, and behaviors around recycling as they interact with factors both at the system level and household level.

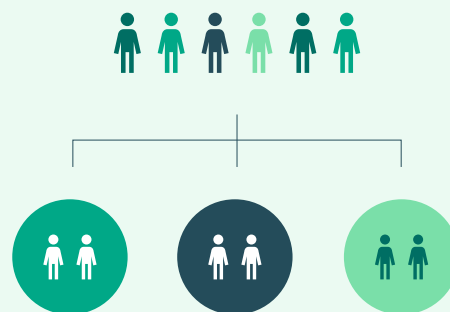
While segmenting people from a purely demographic view may be simpler and more convenient, it does not align with the motivations driving recycling behavior and the barriers to recycling right. Unlike demographics, psychographics point us toward trends for overcoming barriers and leveraging motivations. Through learning people's self-perceptions, identities, values, beliefs, and lifestyles, groups that share similarities (or segments) begin to emerge.

By understanding the psychographics of our audiences, not just the demographics, we can make more strategic investments in meaningful communications and tools to reach people where they are, with the tailored support they need. To begin this process, we partnered with Ipsos to gain insights on the experience of recyclers in single-family households. Our work defined and sized different audience segments with an emphasis on learning the parts of the recycling system each segment finds most frustrating and the beliefs that prevent them from recycling everything they can.

This initial segmentation research uncovered five segments of barriers and beliefs across demographic and geographic boundaries that provide a way to understand different types of recyclers.

Segmentation

Dividing people in distinct groups with distinct characteristics to target them with different solutions and in different ways.



Research Methodology

We focused on single-family households with this initial research because multifamily recycling is generally more complicated, varies widely, and is more difficult to measure at the household level. Our audience segmentation research was conducted in two phases. The initial phase used qualitative research methods and included in-depth interviews with 24 participants using a multi-day online diary, discussion board, and focus group. The findings from the initial phase informed the subsequent quantitative survey, which was conducted online with 2,506 consumers over the age of 18 living in single-family households across the U.S who had access to municipal curbside recycling. Through our research approach we aimed to characterize the various types of recyclers, or segments, by uncovering recycling patterns and barriers to recycling both at the system and individual household level. Our ultimate goal was to identify communications channels and potential interventions to address each segment's barriers so we can develop and test them through future community pilots.



Key Findings

Five distinct types of recyclers (audience segments) emerged from the study.



**Eco
Activators**



**Committed
Followers**



**Discouraged
Self-Doubters**



**Detached
Abiders**




**Conflicted and
Overwhelmed**


Commonalities across these five segments include:


People are motivated to recycle because it reduces waste and protects the planet and about two out of three people also believe recycling benefits the community by creating jobs. This value is so deep-seated that more than half of people admitted they feel guilty when they do not recycle.


- People are hesitant to recycle if they feel it isn't easy, if they lack confidence about what to do, or if they are unsure if recycling is worth it.
- Common barriers that stop people from recycling include:
 - Every day, functional elements such as container capacity, a lack of in-home bins or storage space, and infrequent or complicated collection schedules.
 - Confusion or frustration about the recycling system itself. People see that others aren't doing it or aren't doing it right or they don't feel they receive enough support from their city or town's local program.
- Despite these beliefs and barriers, most people think that recycling is important and is their responsibility.

Unique characteristics of the five recycler segments that emerged in the study:

Eco Activators 	
Description	They care about the environment, research and share how to recycle with others, and have overcome inconveniences to do so. They are hopeful and take pride in their local program but ideally, they want greater systemwide investment, and clear information. They are social and civic minded and encourage others to be as well.
Pull Quote	"[I wish I had] something that would educate others and myself about what and where to properly recycle."
Frequency in Research Sample	25%
Amount of Material Not Recycled	Low
Ability to Reach	Easy. They actively look for information on recycling.
Outlook	Recycling is a responsibility and can be convenient and easy for everyone to do. They appreciate opportunities to share and support others.
Opportunity	Tap into their values of protecting the planet, community responsibility, and impact.
Obstacles	They are strong recyclers but are plagued by skepticism about the impact of recycling and get discouraged by any lack of community engagement or support for recycling.
Support Needed	Reassurance that recycling has a positive impact and showing how they can get involved such as through info sessions, volunteering, or local leadership opportunities.

Committed Followers 	
Description	This straight-forward group feels good about doing their duty for their community, especially since it helps reduce waste and is easy for them to do. They are confident they know exactly what to do and feel they need little additional support but would benefit from reassurance. They are civic minded but private.
Pull Quote	"[I wish there was] more frequent communication and recycling audits so people do it correctly and don't contaminate the stream."
Frequency in Research Sample	24%
Amount of Material Not Recycled	Lowest
Ability to Reach	Easy. They pay attention to guidelines.
Outlook	Recycling is an expectation, worth the effort, and they know how to find solutions to their challenges.
Opportunity	Tap into their values of reducing waste, rules, responsibilities, organization, and clarity.
Obstacles	They have the fewest barriers to recycling due to their high level of knowledge and willingness to seek out information.
Support Needed	Clear, easy instructions and '301-level' information to help them understand the recycling process and what to do with specific materials.

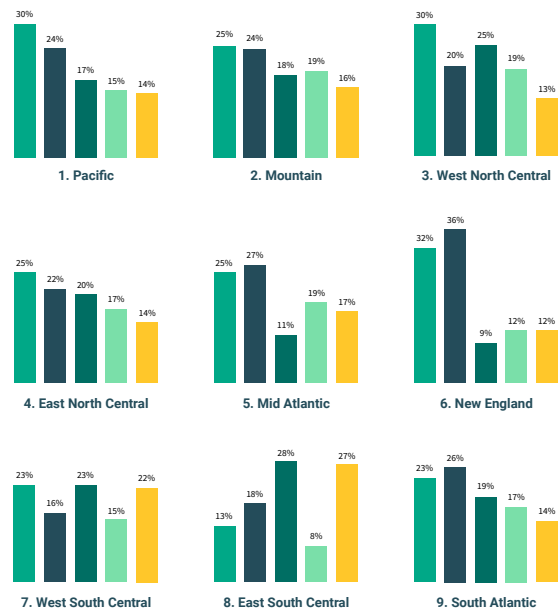
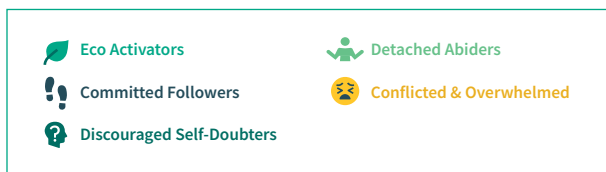
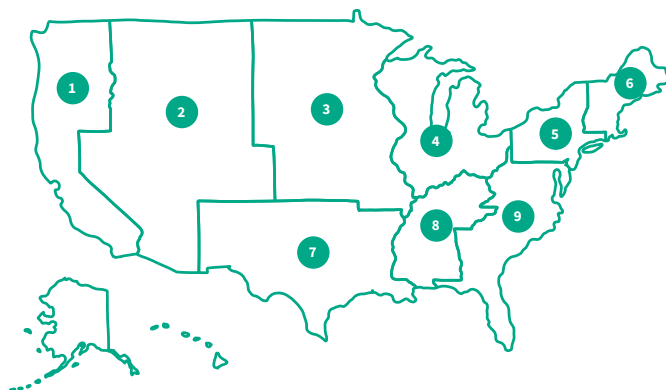
Discouraged Self-Doubters 	
Description	They're not confident in their knowledge of recycling and feel negatively toward it, possibly due to key obstacles like confusion about what and how to recycle, which may be helped with frequent reminders. They lack confidence, clarity, and an understanding of why recycling matters.
Pull Quote	"We have to purchase extra bins approved by the city if we need more than 1. Also, they aren't clear on items that they specifically do and do not accept."
Frequency in Research Sample	18%
Amount of Material Not Recycled	Medium/High
Ability to Reach	Difficult. They don't notice or pay attention to information about recycling.
Outlook	Recycling is an inconvenience. It can reduce waste but is confusing.
Opportunity	Clear information and understanding the impact of their actions.
Obstacles	They don't understand what and how to recycle and run into challenges with prepping, cleaning, and having adequate space for recyclables. The time, cost, and logistics involved with recycling all create friction.
Support Needed	Clarify points of confusion about what and how to recycle through more frequent communications and provide better tools such as in-home bins.

Detached Abiders 	
Description	They recycle because it's convenient and, in many cases, because it is required or feels like it is. They're not confident in what to do and their obstacles lead to negativity. It is as if they are keeping score. They want to know how recycling benefits them and their community and don't want to make an extra effort.
Pull Quote	"I'm just frustrated with how expensive it is. I already pay for trash services, so I don't want to pay for recycling services too."
Frequency in Research Sample	16%
Amount of Material Not Recycled	Medium/High
Ability to Reach	Medium. They somewhat pay attention to recycling information, but not enthusiastically.
Outlook	Recycling is not a priority and they only do it when it's easy.
Opportunity	Standard, simplified ways of recycling and support building stronger habits.
Obstacles	They have strong skepticism about the impact of recycling and don't want to put in the effort and time required to learn what and how to recycle, especially when it comes to prepping and cleaning items.
Support Needed	Demonstrate how recycling benefits them and their community. Make it easier with simple signage and regular communications.

Conflicted & Overwhelmed

Description	This diverse segment agrees that recycling has some benefits, but they experience many obstacles. In the context of their busy life, recycling feels important conceptually, but the practical steps required to do it fall short of being worthwhile. This conflict leaves them frustrated and worried. They feel judged whether they do or don't recycle. They need more information and support on specific 'to-dos' from their municipality. It needs to be easier, and they need to see others doing it as well.
Pull Quote	"The biweekly pickup schedule of recyclables gets confusing. Paper & cardboard one week, plastic and cans next week. If you miss one week you have a collection of three weeks of the recycled item."
Frequency in Research Sample	16%
Amount of Material Not Recycled	Highest
Ability to Reach	Difficult. They are interested in information but since they rely on word of mouth, they don't get the practical, supportive information they need.
Outlook	Recycling is frustrating but important. They deprioritize it, but it still worries them and they feel guilty about it.
Opportunity	Receiving support from their community to recycle and clarity on why it is a responsibility.
Obstacles	They have the highest number of obstacles among the 5 segments including skepticism around the impact of recycling, lack of adequate bins and knowledge on what and how to recycle, as well as challenges related to the inconvenience, time, and effort involved with recycling.
Support Needed	Keep it simple and easy by focusing on the basics, provide larger containers or more frequent collection, and send communications with quick tips and tricks.

Regional Variation of the Five Curbside Recycler Segments



Like other community programs and civic issues, we found variations in the occurrence of the five recycler types within different regions of the U.S. Overall, this map somewhat aligns with our map of recycling access nationwide. Intuitively, recycling programs that have been in place for a longer period of time, such as in the cities of Seattle or San Francisco, are more likely to see better performance because they have made recycling a strong social norm and expectation over time. Areas with relatively new recycling programs or that lack the resources, infrastructure, leadership, and community buy-in are more likely to face greater performance challenges. However, it is important to keep in mind confidence and confusion around recycling impact all five recycler types. Additionally, when reviewing this map and thinking about variation at the community level, keep in mind that just like demographic variation, the occurrence of the five recycler types may be very different for a specific city or town compared to its surrounding region.

Conclusions & Opportunities

This initial audience segmentation research has given us a more nuanced view of single-family household recyclers – what drives their behavior and what might help them recycle better. Like building a house we have laid the foundation and now need to embark on further research to frame it up and give it structure.

The Center intends to advance this work and help stakeholders apply the learnings to program and packaging design.