



# TOWARDS AN UNDERSTANDING OF THE ROLE OF CONSUMERS IN TRANSITIONING TO A CIRCULAR ECONOMY IN SOUTH AFRICA

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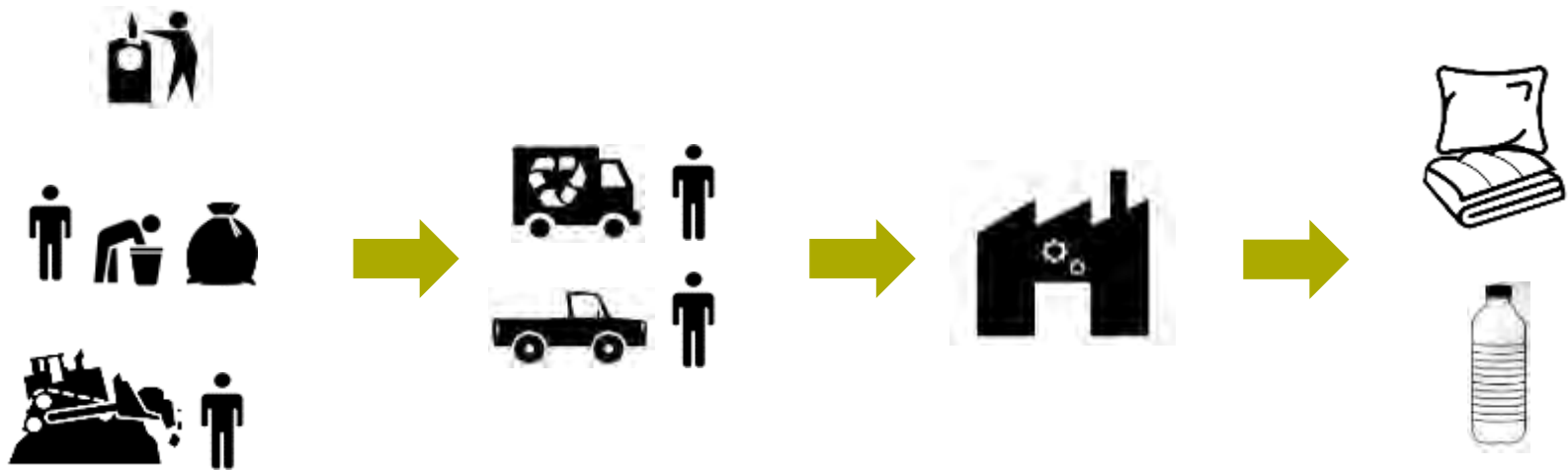
# FROM A **LINEAR** ECONOMY ...



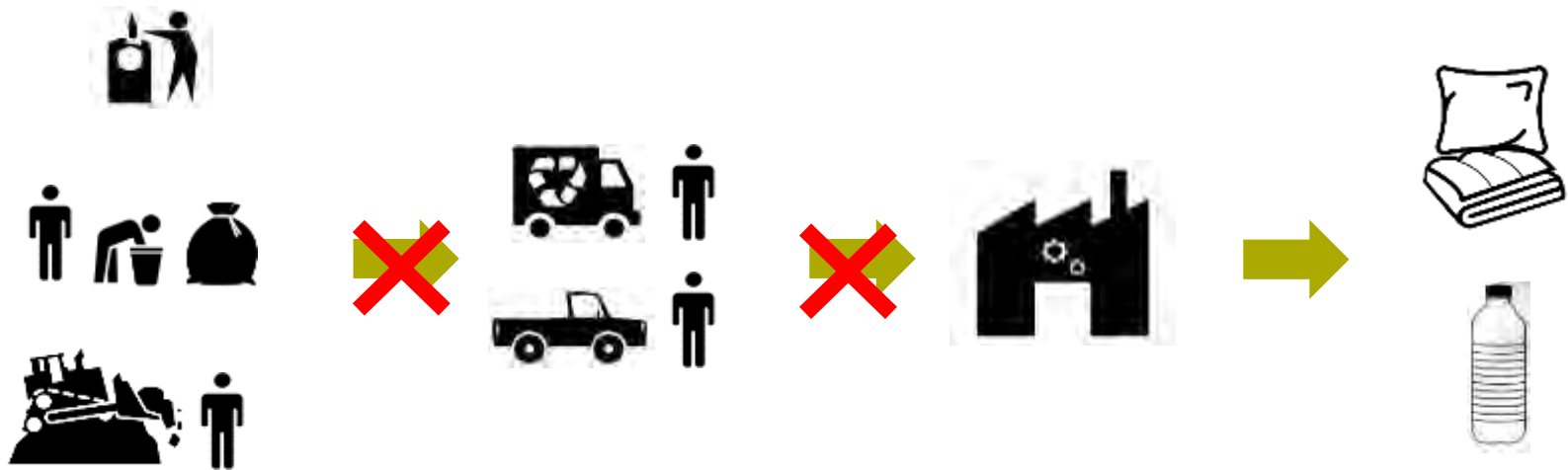
# ...TO A **CIRCULAR** ECONOMY.



# THE RECYCLING VALUE CHAIN

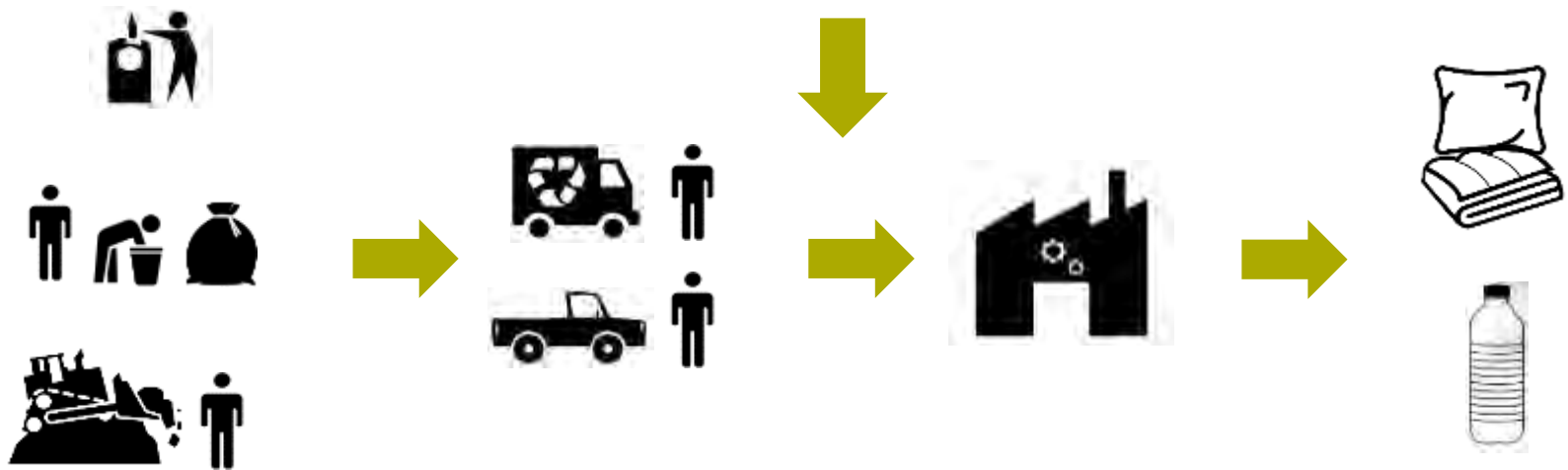


# THE RECYCLING VALUE CHAIN



# THE RECYCLING VALUE CHAIN

PETCO adds funding here ...



... which enables this to flow



R22.6m

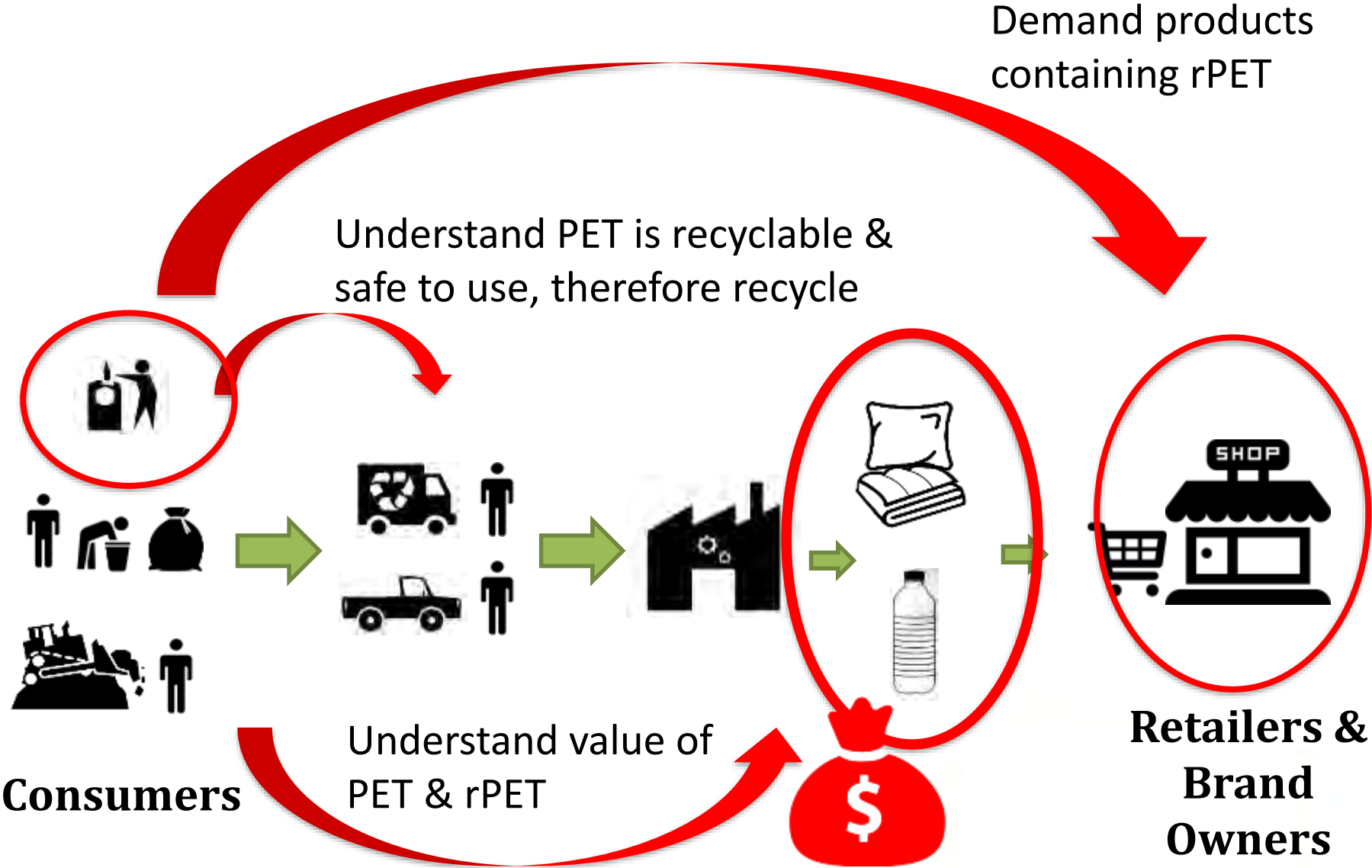
R363m



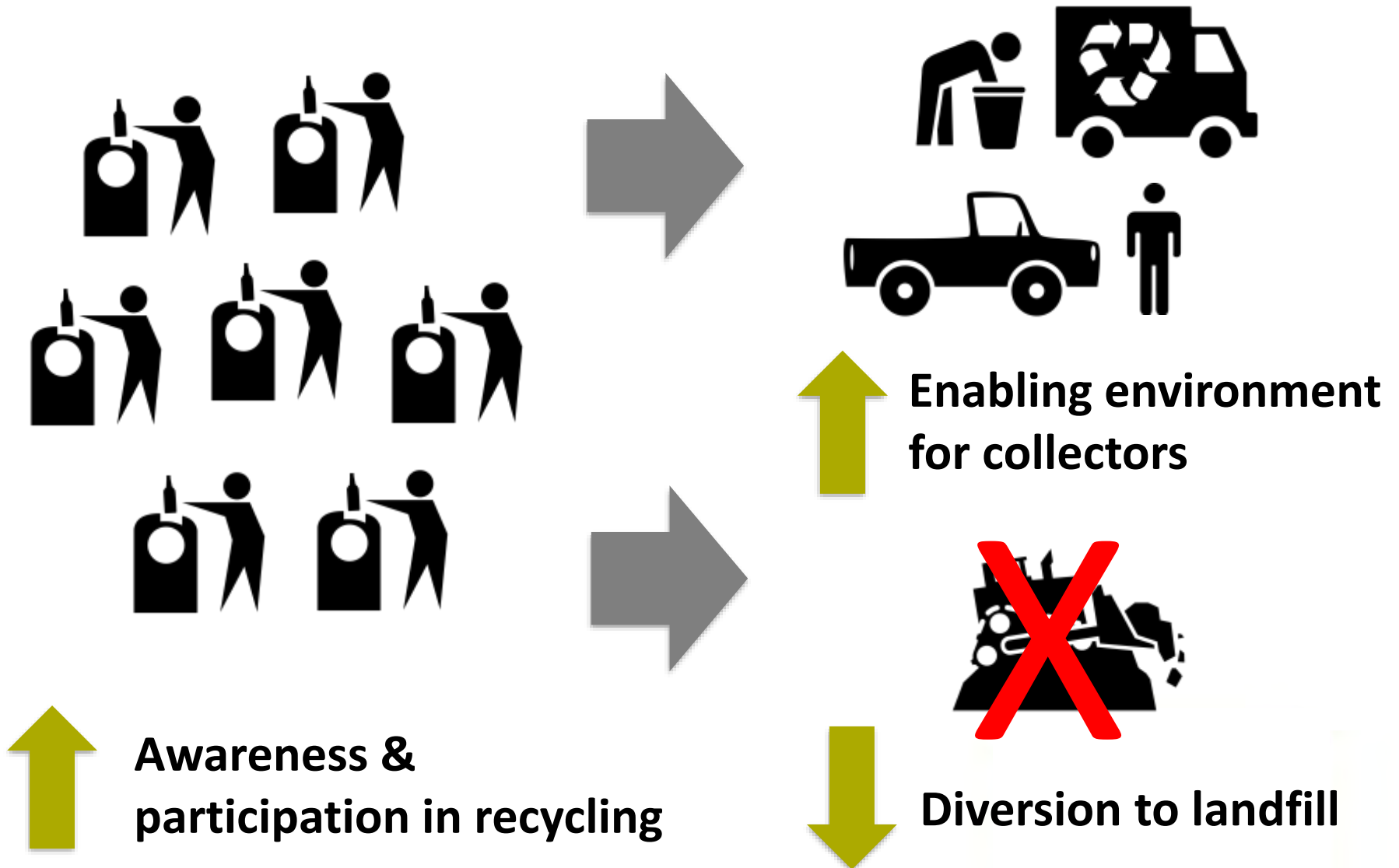
# GROWTH OF PET BOTTLE RECYCLING IN SOUTH AFRICA



# THE ROLE OF THE CONSUMER



# PETCO'S THEORY OF CHANGE



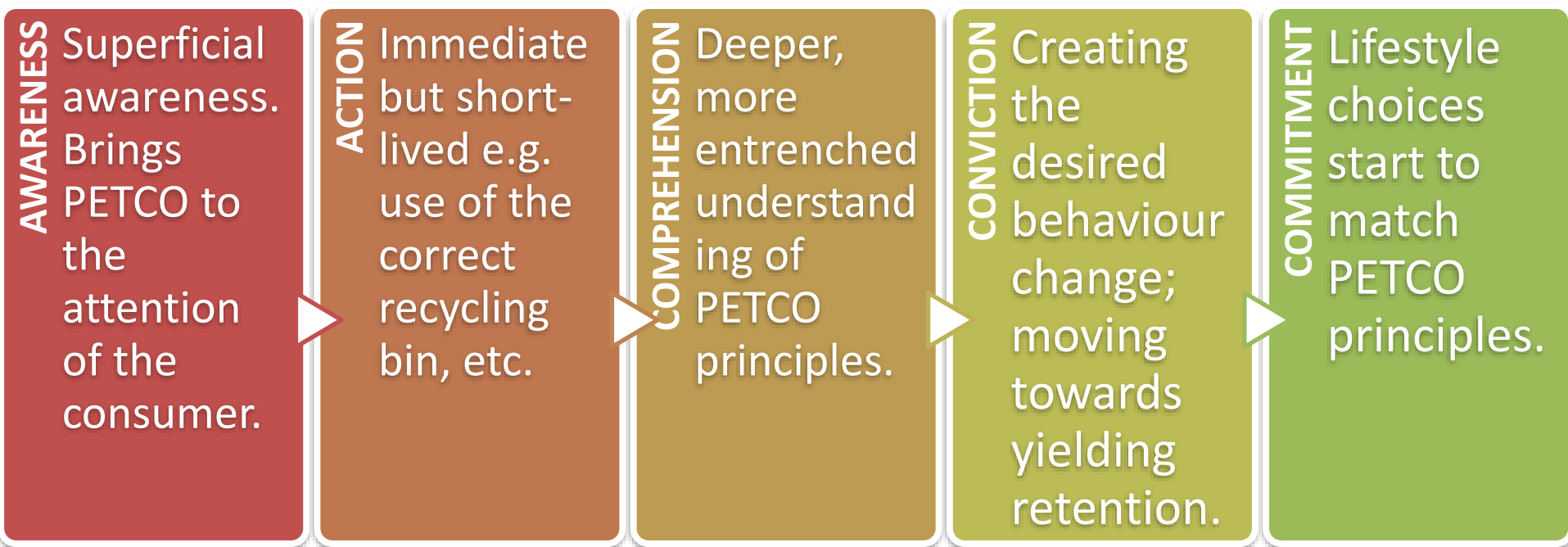


# UNDERSTANDING WHO WE ARE TALKING TO ...

1. Primary target audience comprises South African consumers, LSM 7 to 10, ages 18 to 55;
2. Secondary target audience comprises South African consumers LSM 4 to 6, ages 18 to 55;
3. Tertiary target audience comprises South African consumers LSM 1 to 3, ages 18 to 55.



# THE PETCO CONSUMER ENGAGEMENT JOURNEY



# CONSUMER RESEARCH RESULTS

## LSM 1-3

- Centralised drop-off site.
- 50% claim to recycle all or some of the time.
- Female bias
- Drivers = economic and environmental
- Key comms channels = WOM, radio
- Resistance to paying for waste management service.

## LSM 4-6

- Recycling = **re-use**
- High level of apathy.
- Drivers = economic
- Barriers = storage space; collection services
- Key comms channel = social media
- Resistance to paying for waste management service.
- Great respect for informal sector.

## LSM 7-10

- 11% recycle ALL the time; 67% some of the time.
- Drivers = environmental
- Barriers = storage space
- Key comms channels = TV, print media (NOT social media!)
- Low tolerance of informal sector.

# CONSUMER IMPACT DASHBOARD 2016

## WHAT WE DID?

Training + skills development:

**16** Accredited training courses **3** Municipality workshops

Events:

**6**

Exhibitions:

**2**

Media:



■ Online 50%  
■ Print 46%  
■ Broadcast 4%

▲ 802% (vs 2015) ROI: **1435%**

Web stats: (last 6 months)

**13 167** Total sessions **34 410** Page views

Social media:

**f** **1 466** Likes ▲ 271% (vs 2015)  
**t** **1 199** Followers ▲ 141% (vs 2015)  
**i** **71** Followers 80% (vs 2015)  
**y** **51** Subscribers 20% (vs 2015)



### COMMITMENT

Recycle at the time with fullest understanding of benefits



### CONVICTION

Recycle regularly with good understanding of benefits



### COMPREHENSION

Recycle regularly with some understanding of benefits



### ACTION

Recycle at all



### AWARENESS

Of concept of recycling

LSM 7-10  
665 Respondents

## INDUSTRY WINS

Post-consumer bottles recycled:



**22%**  
INCREASE FROM 2015

Post-consumer recycling rate:



**3%**  
INCREASE FROM 2015

Shareholder members:

**19**

Associate members:

**53**

# DESIGN PRINCIPLES

1. Know your system and work at multiple levels of scale.
2. Know who you are talking to and make it easy for them to act.
3. Create a platform that enables broad buy-in from stakeholders.
4. Identify key leverage points, particularly fulcrum actors, who facilitate access to broader and influential networks.
5. Keep your message clear, simple and consistent.
6. Provide a way to act.
7. Don't just do. Take time to reflect.







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