

A SINGAPORE PERSPECTIVE ON PLASTICS AND THE OPPORTUNITY FOR BRANDS TO DRIVE CHANGE

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GAME CHANGERS



GROWING CONCERN OVER PLASTICS DELIVERS A NEW 'MOMENT OF TRUTH' FOR BRANDS

This paper examines public attitudes towards plastic packaging and waste in Singapore, and provides insights into the various paths that businesses need to navigate in the

global challenge of plastic reduction. As well as setting out the current situation, we explore opportunities for brands to drive change.

55%

55% of Singaporeans state that global warming/climate change is the top environmental issue of concern for the country

4 in 5

4 in 5 Singaporeans agree that the excessive use of plastics is a problem, with 47% claiming that they usually separate their plastic waste for recycling

38%

38% of Singaporeans are willing to accept a small price increase supporting policies to phase out single-use plastics or disposable non-biodegradable plastics, in favour of those made with more biodegradable materials or reusable alternatives

THE SINGAPORE PLASTIC SITUATION

As a small country of just 725 km² and a population of over 5.6 million people, Singapore is one of the most densely populated countries in the world.

Singapore is a developed country, with the 7th highest GDP per capita, where plastic bags and other single-use plastics have become cheaply and widely available. For more than three decades, retailers and eateries have offered plastic bags, containers and disposable cutlery at no extra charge to their customers, making single-use plastic part and parcel of the fast-paced urban Singapore lifestyle.

In a paper released by the Singapore Environment Council in 2011, it was estimated that Singapore use three billion plastic bags for an average of just 12 minutes¹. While Singapore has plastic recycling facilities, a lot of what the facilities receive still gets discarded because of contamination.

In 2018, Singapore generated nearly 950,000 tonnes of plastic waste, but only 4% was recycled - the lowest rate in 15 years. In comparison, EU countries recycled 42% of plastic packaging in 2018². Non-recyclables and other general waste are either incinerated or sent to an off-shore landfill, Pulau Semakau. There is also a significant proportion of recyclable waste such as paper, plastics, glass and metal that gets exported to countries including Australia, China and India for processing and recycling. But this too has its challenges. For example, China, who used to be the world's top importer of recyclable rubbish, announced in 2017 that it no longer wanted to import "foreign garbage"³. As a result, countries who export recyclable waste to China would need to find alternatives. Singapore has a particularly unique position because of land scarcity and therefore the lack of landfills and recycling plants. It is estimated that, if the issue is not addressed, Singapore will need to build one waste-to-energy plant every 7-10 years and one landfill every 30-35 years.

A RISING ISSUE IN THE SOCIETAL AND POLITICAL CONSCIOUSNESS

At the 2019 National Day Rally speech, Prime Minister Lee Hsien Loong urged Singaporeans to “treat climate change with utmost seriousness”⁴. PM Lee added that the government expects to spend at least S\$100 billion over the next 100 years investing in engineering solutions to protect Singapore’s coastlines from rising sea levels. But climate change and environmental responsibility is not a new concept to many Singaporeans. In our recent survey, 55% of Singaporeans deem that climate change is the top environmental issue that should receive the greatest attention from local leaders[†]. This is followed by dealing with waste (43%) and future energy sources (28%). There is

also an acceptance among Singaporeans (97%) that climate change is at least partly influenced by human activity^{††}.

Singaporeans recognise everyone has some personal responsibility in driving real change, but two-thirds of Singaporeans believe that governments and international organisations like the UN and ASEAN, should be most responsible for taking action on climate change. This may be in part due to the 50% of Singaporeans who feel that there are too many conflicting opinions for the public to be confident about claims made around climate change, and 24% who say that the seriousness of climate change is exaggerated^{††}.

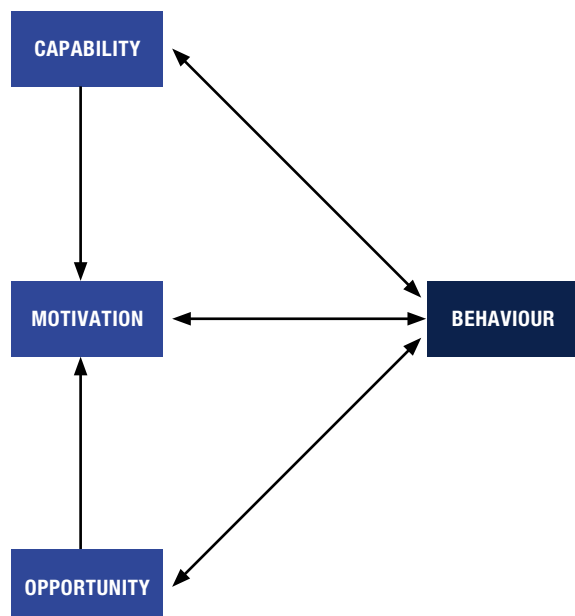
ATTITUDES TOWARDS PLASTICS AND HOW TO DRIVE CHANGE

Despite the lack of clarity on climate change, Singaporeans (78%) recognise that their behaviour has an impact on the environment^{†††}, and they take a rather serious view specifically on the use of plastics. Singaporeans agree that the excessive use of plastics is a problem[†] (79%), and nearly half of Singaporeans (47%) say that they usually separate their plastic waste to be sent for recycling^{††}.

But the reasons for the practice of recycling not being more widespread are varied. 47% agree that engaging in environmentally friendly practices is inconvenient^{†††} and only 26% are confident in interpreting the recycling symbols on packaging^{††}.

According to a survey conducted by PACT of WWF in November 2018, 70% of Singaporeans say that they would recycle more if it was more convenient and easier to recycle, 60% would recycle more if there is a cash incentive to recycling, 43% would if the recyclable information is clearly printed on packaging products, and 33% would recycle more if it was legislated by the government. To reduce the problems caused by unnecessary use of plastic items that cannot be recycled, 35% are willing to stop using plastic bags, straws and bottles and 37% say they are willing to buy more products made from recycled materials.

Figure 1 A framework for understanding behaviour



Source: Michie S, van Stralen M, West R. *The behaviour change wheel: A new method for characterising and designing behaviour change interventions. Implementation Science. 2011;6:42.*

To understand the relationship between an individual's belief in the cause and his behaviour, we applied an Ipsos Bayes Net (IBN) simulation that allows us to measure the impact of one variable on the other. The IBN simulation applied has shown that if we are able to increase an individual's belief that their behaviour has an impact on the environment, the number of recycling occasions every week could increase by up to 20%.

There are numerous methods and incentives we can put in place to drive change, but to identify the most effective and impactful

ones, we must consider the three mechanisms that make a behaviour possible: Motivation (automatic and reflective), Ability (physical and psychological), and the Context (Physical and Social) in which the behaviour takes place (Figure 1). By using this lens to understand the behaviour environment, we can identify the potentially most effective "interventions" that can influence behaviour to move in certain directions. In short, this answers the question, "what can we do to get people to behave the way we want them to or to support a specific point of view?"

PUBLIC POLICIES AND REGULATIONS

Given the expectations of Singaporeans on local leaders to take action to address the situation, it is important to understand where Singapore stands on related policies and regulations. In the Sustainable Singapore Blueprint published in 2015, the National Environment Agency describes initiatives like the Singapore Packaging Agreement⁵, an integrated waste management facility, and other plans to move the country to a zero waste nation.

Organisations like PACT (Plastic Action)⁶, a voluntary business initiative of the WWF (World Wide Fund for Nature) have also made significant strides on a sectoral level as well as on an individual company level. For example, in June

2019, PACT, together with Zero Waste SG, signed 23,970 food and beverage outlets in Singapore to phase out plastic straws by 1 July 2019.

So far, such government-led and NPO-led initiatives have been largely focussed on helping businesses make changes. Similar initiatives to drive behavioural change among consumers is still relatively new in Singapore. Local and community-led initiatives tend to lack scale and durability too.

Figure 2 Singapore's policies for industrial plastic waste reduction⁷



Source: National Environmental Agency; Channel News Asia; Eco-Business

HOW ARE BUSINESSES TRYING TO DRIVE CHANGE?

While businesses are open to exploring alternatives, the largest concern will naturally be cost and continued commercial viability. In Singapore, 37% of people say they are open to a small price increase to support policies to phase out single-use plastics or disposable non-biodegradable plastics such as plastic bags, straws, food containers, plastic bottles, etc., in favour of those made with more biodegradable materials or reusable alternatives. However, 54% of Singaporeans would only support these policies if there were no price increase. The remaining 9% would not support these policies at all.

There is also an expectation from Singaporeans on businesses that produce packaged goods and businesses that sell packaged goods to take responsibility in reducing the amount of unnecessary packaging which is sold[†].

Brands' initiatives to help reduce plastic waste and promote a sustainable environment include replacing all plastic packaging with recycled plastic products, replacing single-use plastic containers and straws with eco-friendly products and launching promotions to encourage non-plastic use. For example, Accor Hotels have committed to ban plastic straws and provide alternative solutions. The group is now also tackling other amenities such as plastic stirrers and cotton buds to be eradicated from all properties by 2020 and replaced with more sustainable options.

Retailers are also moving towards using eco-friendly packaging such as banana leaves and bio-plastic bags. Eco-friendly stores that have refilling stations for consumers to use their own non-plastic packaging for soaps and shampoo have become increasingly popular. The Social Space in Singapore is one example. This store offers refills on cleaning products ranging from laundry detergent to pet shampoo.

The recycling industry in Singapore is however facing some challenges which will need to be addressed in partnership with all societal actors. The lack of local demand for recyclables (which then must compete to be sold in overseas markets), China's recent ban of imports on certain plastic categories for recycling, the low levels of recycling and high levels of product contamination at source represent some key challenges faced by the industry. The Sustainable Singapore Blueprint that the government has put together will eventually address some of these issues but growth of the recycling industry is expected to be limited in the short term.

In Singapore, consistent with markets all over the world, consumer sentiment is shaping new expectations and new behaviours around sustainable packaging, which creates a new commercial imperative.



WHAT DOES THIS MEAN FOR BRANDS?

Durability, low cost, light weight and ease of manufacturing are some of the reasons for the extensive use of plastics today. Not negating the fact that plastics still have a huge role to play, we are in the age where plastic waste and packaging sustainability are critical global environmental issues, and where corporate responsibility is expected. Certainly, it is less about replacing plastic altogether as it is about demonstrating the responsible use and management of plastics across the product value chain. If done well, it also becomes an opportunity for brands to leverage as a point of differentiation.

In drawing up a sustainability plan, the course of action could inadvertently be confined to innovation of the physical product. However, the potential for innovation can go much beyond this. Brands should consider how they can become more relevant on all aspects:

- Brand narratives – What needs are your brands targeting/addressing? How can your brand play to the physical and emotional values of people on this topic?
- Products – To what extent can plastics in your products be reduced or replaced by more sustainable alternatives?
- Packaging – To what extent can plastics in your packaging be reduced or replaced by more sustainable alternatives? Can alternative packaging formats, sizes or delivery formats be explored?

- Communications – How do you effectively ensure messaging is in line and supports your brand promise? Does it offer your brand an effective first point of differentiation?
- Experiences – What does the brand deliver that enables changes in mindset and behaviour of the consumer? Is the usage experience authentic with the communications?
- Partnerships - How should you think about sponsorship, corporate social responsibility and partnerships overall to remain true to these values?

The issue of plastic waste is one that needs all social actors - consumers, businesses and governments - to work together to solve. As a society, Singapore must create the right motivations for change, the physical infrastructure needed and influence the culture to make environmentally-friendly behaviours the norm.

"Plastic has its place, but that place is not in the environment. We can only eliminate plastic waste by acting fast and taking radical action at all points in the plastic cycle."

Alan Jope
Unilever CEO

TECHNICAL NOTES

Unless otherwise stated, data cited in this report was derived from the following Ipsos studies:

- † Attitudes towards Plastics (SG, MY, ID) n=867, 26-30 April 2019
- †† Attitudes towards Plastics Use (SG) n=500, 15-27 August 2019
- ††† Attitudes towards Climate Change (SG) n=582, 21-23 August 2019

The above surveys were conducted online, among nationally representative samples of citizens and permanent residents of Singapore.

OTHER SOURCES

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