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Waste Segregation at Source in Vietnam

SEGMENTATION - KEY TARGET GROUP






MAY 2024



About Waste Segregation at Source in Vietnam Survey 2024

TGM Research & PRO Vietnam have conducted an independent consumer waste segregation survey to explore and comprehend shifts in customer behavior within key cities in Vietnam.

| | | |
|---|---------------------|---|
|  | Schedule: | 18th March - 15th April 2024 |
|  | Sample: | A representative sample of N = 1,676 participants residing in Vietnam, age: 15-64 |
|  | Methodology: | Internet interviews (CAWI), research project was entirely conducted by TGM Research |





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From Indifference to Action: Exploring Environmental Engagement Among 15-24 Year Olds





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AWARENESS

of Environmental Protection,
Environmental Regulations, And
Waste Segregation



Among the Vietnamese surveyed, a significant 73% exhibit interest in environmental issues, with this inclination remaining consistent across gender and throughout all cities.

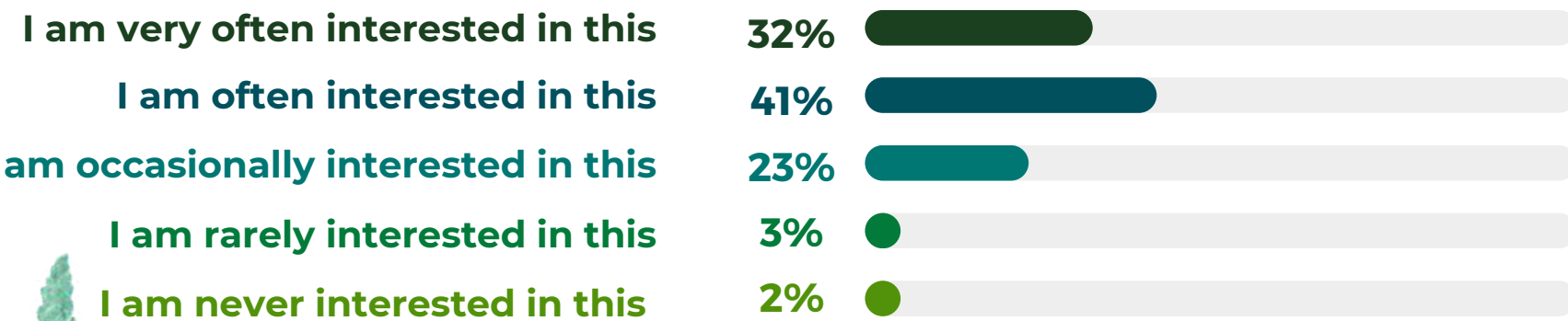


TOTAL VIETNAM

73%

of surveyed Vietnamese are interested in environmental issues

Top 2 boxes



Q: How much are you interested in environmental issues (like: global warming, climate change, water pollution)? N=1676



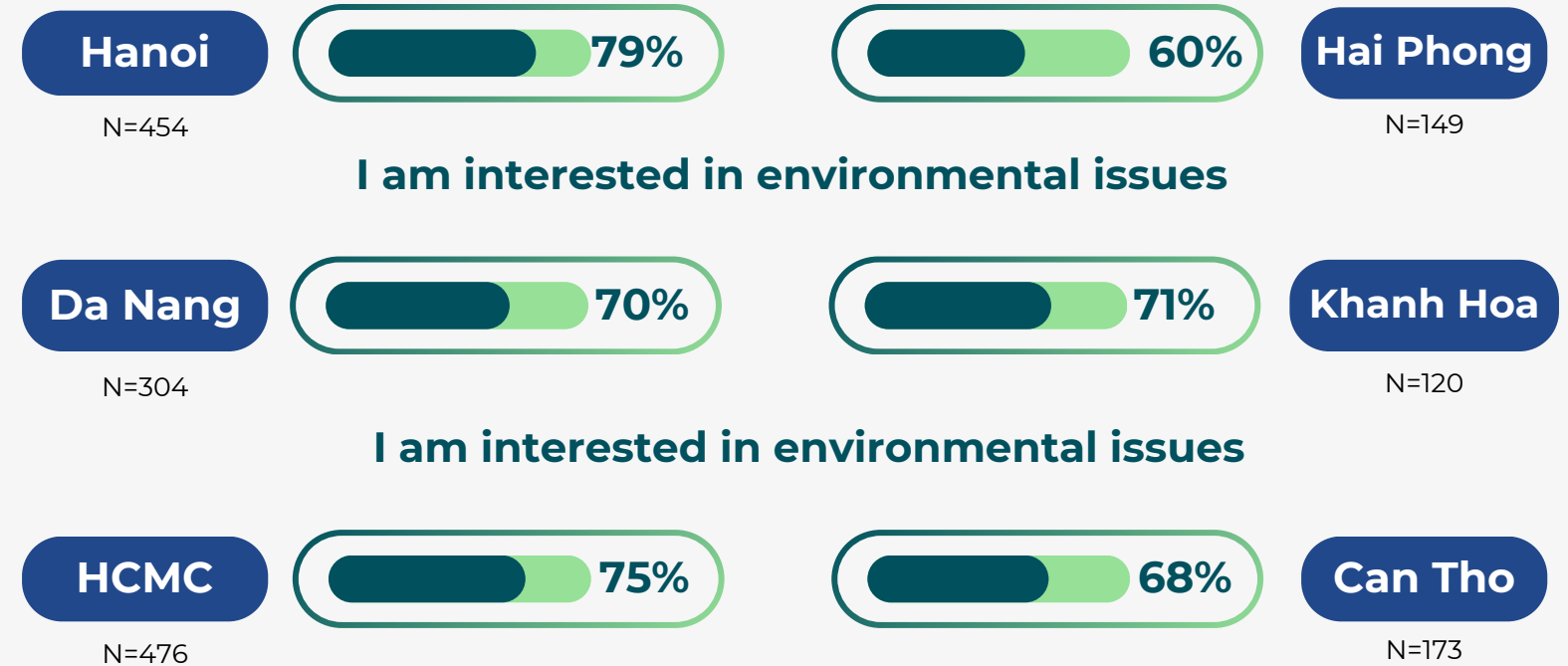
N=957



N=719

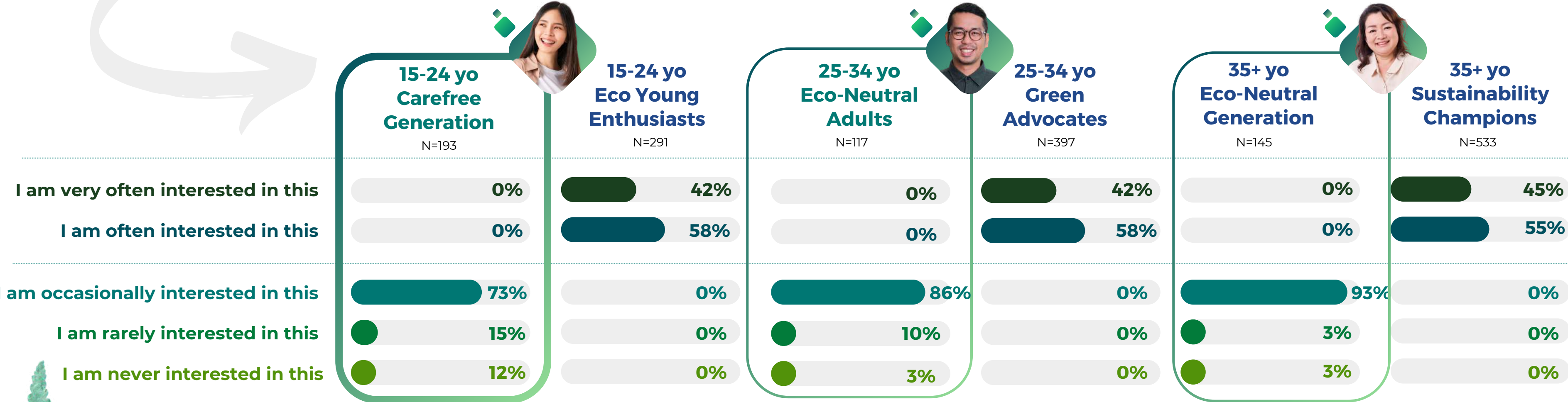
Interest in Environmental Matters among Vietnam Key Cities

Top 3 boxes



Which group has the least interest in environmental issues?

How much are you interested in environmental issues (like: global warming, climate change, water pollution)?



Q: How much are you interested in environmental issues (like: global warming, climate change, water pollution)? N=1676





Segmentation Definition



B1. How much are you interested in environmental issues (like: global warming, climate change, water pollution)?

Group 1



- Who are **occasionally** interested + **rarely** interested in + **never** interested in environmental issues.

15-24

The Carefree Generation

Group 2

- Who are **often** interested + **very often** interested in environmental issues.

15-24

The Eco Young Enthusiasts

Group 3



- Who are **occasionally** interested + **rarely** interested in + **never** interested in environmental issues.

25-34

The Eco-Neutral Adults

Group 4

- Who are **often** interested + **very often** interested in environmental issues.

25-34

The Green Advocates

Group 5



- Who are **occasionally** interested + **rarely** interested in + **never** interested in environmental issues.

35+

The Eco-Neutral Generation

Group 6

- Who are **often** interested + **very often** interested in environmental issues.

35+

The Sustainability Champions





15-24 yo

Group 1: The Carefree Generation

What are their characteristics?

“

I am very active on social media

I am very reliant on mobile phone

I am skeptical of the Internet

I am socially conscious

I am very family-oriented

I make my own decisions

I am driven by content, not platform

”



Gen Z



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What is their **awareness**
of environmental issues,
and how can we effectively
engage them to **increase**
action conversion ?





This group has the least interest in the environment, sustainability, and the natural world compared to others.



How would you describe your approach to the environment, sustainability and the natural world?



N=1676

52%

Top box

of surveyed Vietnamese are **very interested** in their approach to the environment, sustainability and the natural world



15-24

The Carefree Generation

I am **very interested** in this



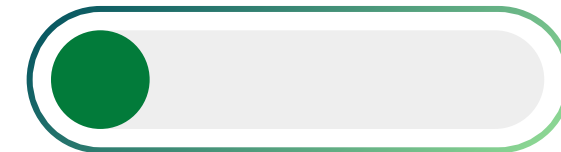
12%

I am **somewhat** interested in this



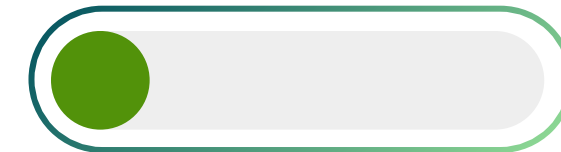
66%

I am **rarely** interested in this



20%

I am **never** interested in this



1%



As a result, there are higher percentage of them rarely use reusable shopping bags, sign petitions, or donate to environmental causes.



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N=1676



How often do you do the following:

VERY OFTEN OFTEN

VERY OFTEN OFTEN OCCASIONALLY NEVER RARELY



I take a reusable bag for shopping



I buy ready-made take-away meals in disposable packaging



I sign petitions or donate money to environmental causes



Personal shopping in online shops



Personal shopping in traditional shops



Q: How often do you do the following? Group 1 - The Carefree Generation N=193

57%


of surveyed Vietnamese often take reusable bag for shopping

Q: How often do you do the following? N=1676





15-24
The Carefree Generation

Do you think there are any **environmental issues** in your living area? 

77% of Vietnamese respondents stated their belief that environmental issues exist in their living areas.



77%

YES

TOTAL VIETNAM

23%

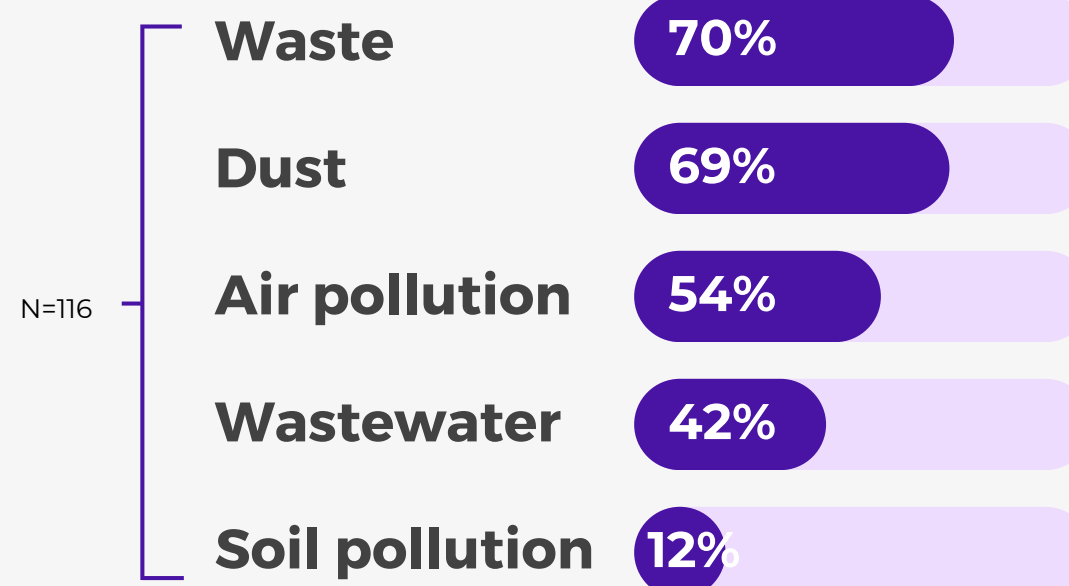
NO

Q: Do you think there are any environmental issues in your living area? N=1676

Do you think there are any **environmental issues** in your living area?



If yes, what environmental issues do you think exist in your living area?



“

Although most surveyed Vietnamese are aware of environmental issues in their area, **40% of this group** said they are not.



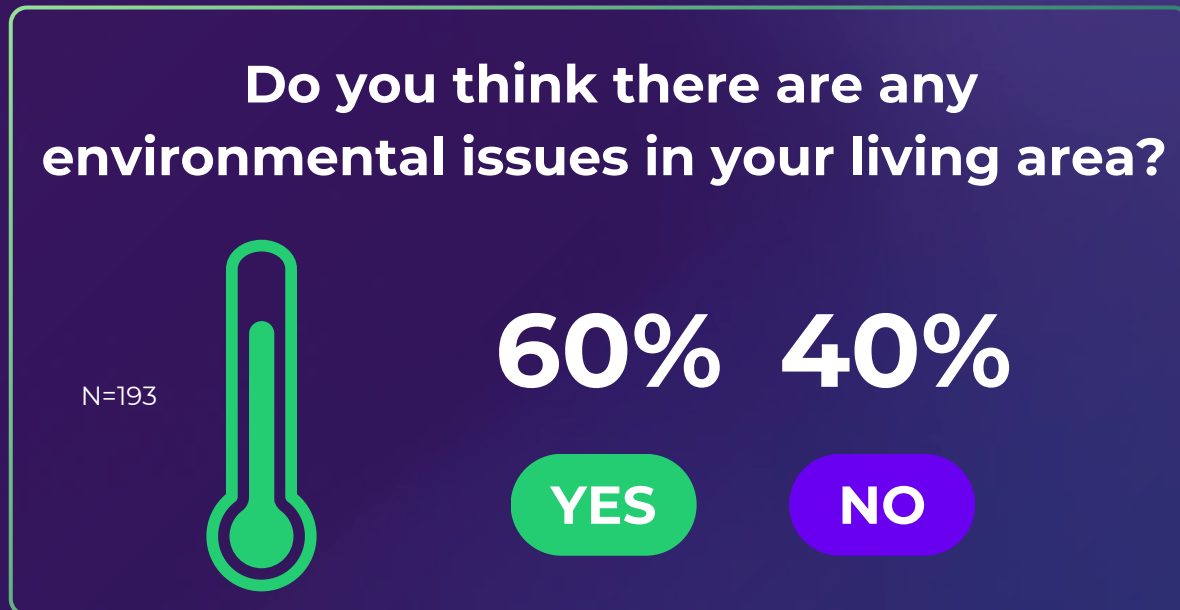


Among those unaware, 47% are young males, leading to 30% of the group being uninterested or never participating in local environmental activities.

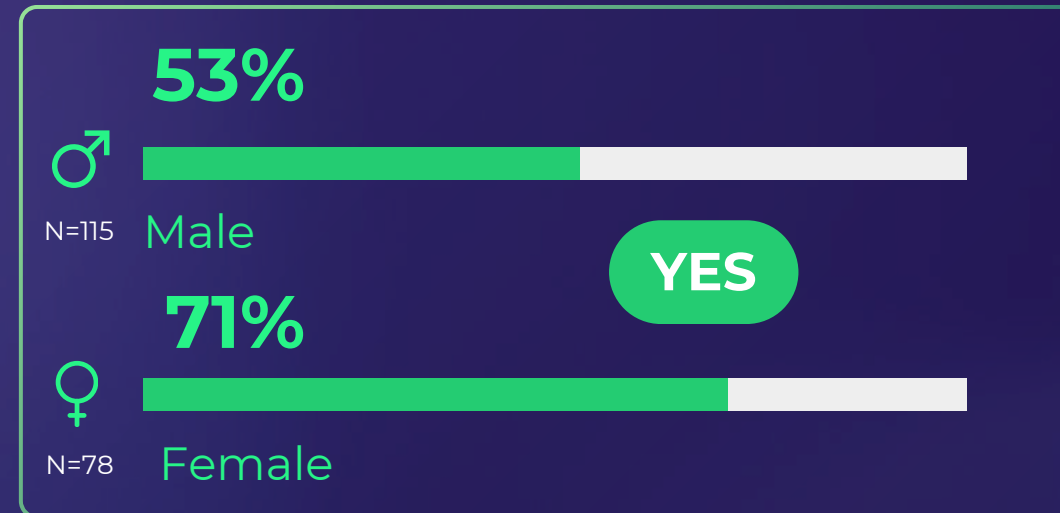


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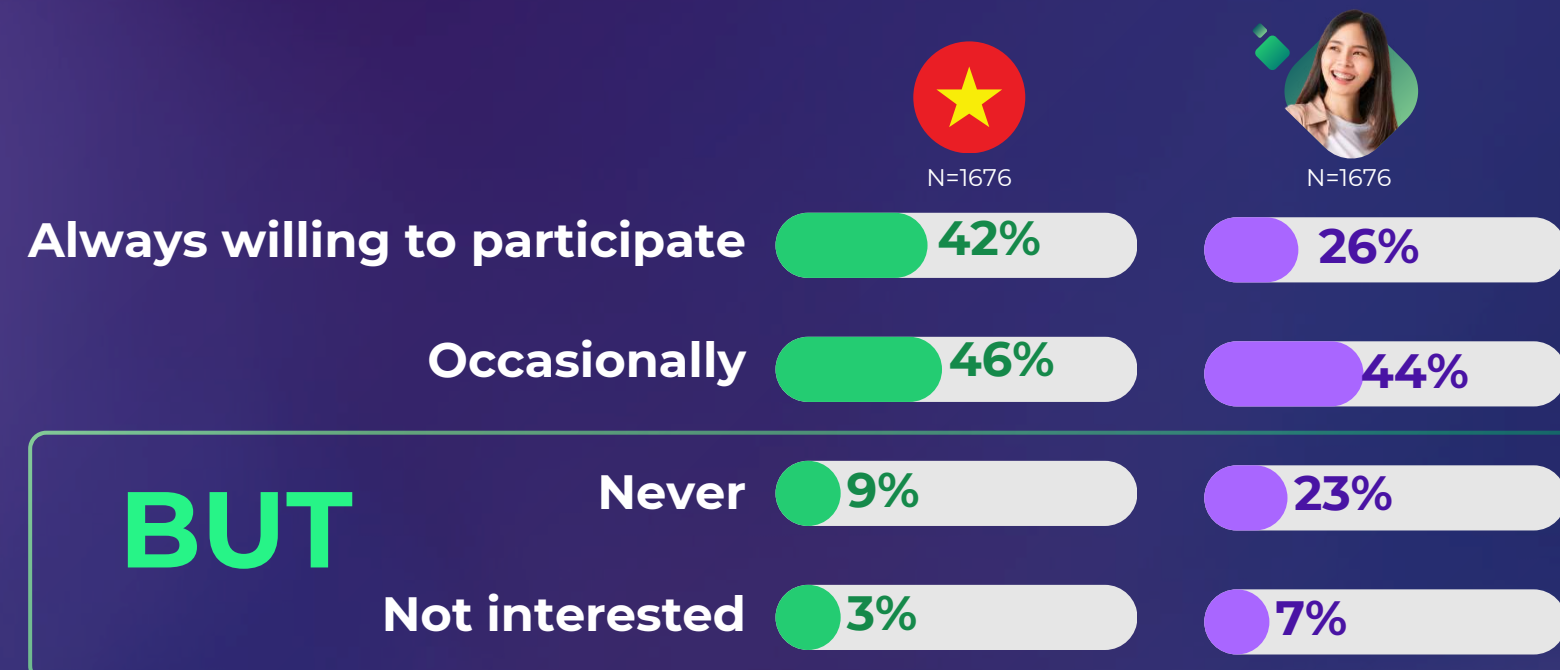
15-24
The Carefree Generation



GENDER



Have you ever participated in environmental protection meetings or activities locally?





To effectively engage this generation, emphasizing the significance of programs may outweigh the emphasis on new knowledge or valuable information gained. Additionally, the event's significance tends to resonate more with males than females.



How to get them participate?

30%

of surveyed **15-24 Carefree Generation** **never & not interested** in participating in environmental protection meetings or activities locally.

Q: Have you ever participated in environmental protection meetings or activities locally? N=193



12%

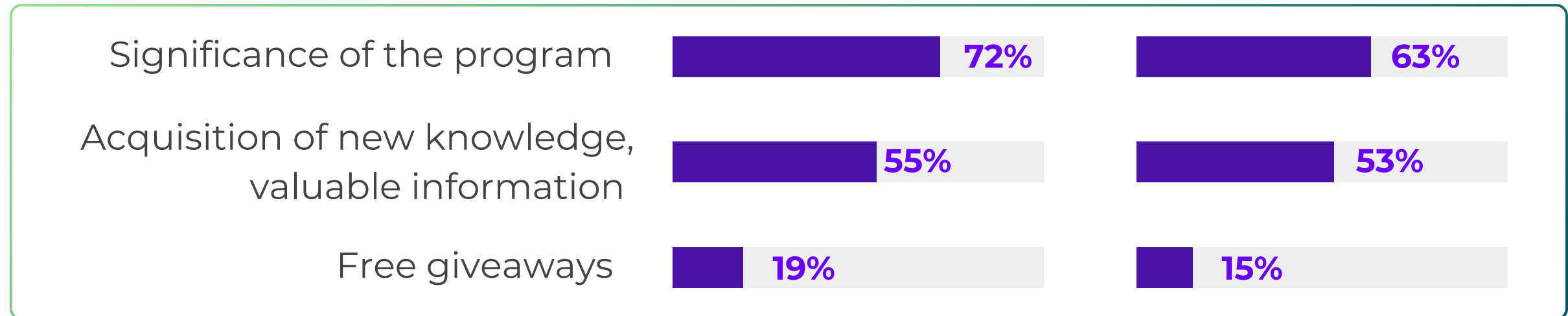
N=1676

of total Vietnamese respondents **never & not interested** in participating in environmental protection meetings or activities locally.

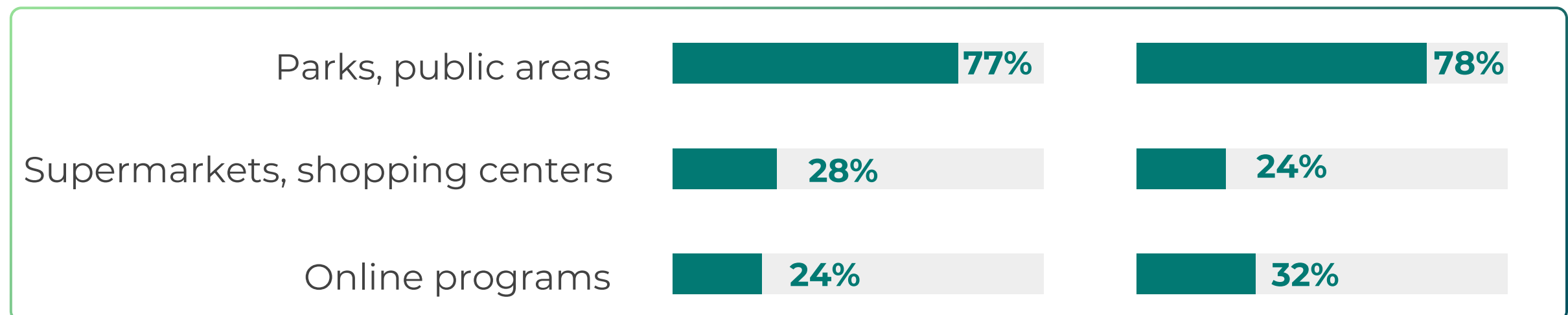
What INTERESTS you when participating in environmental events?

♂ **Male**
N=115

♀ **Female**
N=78



Where do you prefer environmental events to be held?

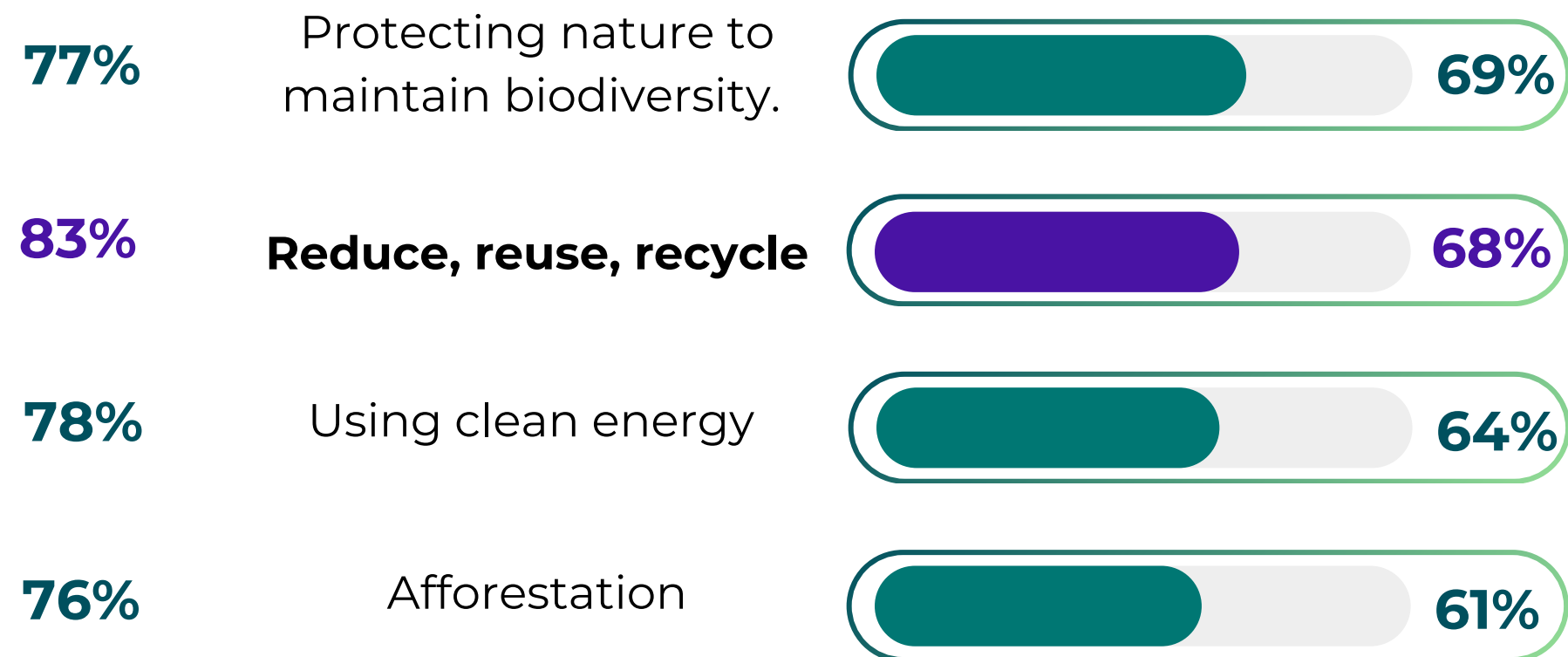


However, they do possess basic knowledge of these environmental protection activities. Among them, females have the highest awareness of the impact of reducing, reusing, and recycling on the environment.



N=1676

15-24
The Carefree Generation



85%
of this group's females perceive **reduce, reuse, recycle** as activities positively affect the environment



Activities that consumers perceived positively affect the environment

Q: According to you, which activities positively affect the environment (please mark the activities you consider appropriate)? N=193



Interestingly, the most popular activities for protecting the environment are proper waste disposal and saving electricity.



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N=1676

86%

Proper disposal of waste

79%

Save electricity

75%

Use water efficiently

72%

Waste sorting

70%

Reduce, enhance reuse

66%

Use personal bags when shopping



15-24

The Carefree Generation

Q: What activities do you engage in to protect the environment? N=193

77%

65%

64%

56%

55%

51%



Activities that The Carefree Generation engage in to protect the environment



When asked about the 3R concept (Reduce, Reuse, Recycle), it turns out that only 50% of them recognize it by sight or hearing, indicating a lack of deeper knowledge about the 3R principles.



N=193

“

26%

I have not heard of it

50%

I only know it by sight/hearing



Awareness of the 3R Concept is notably lower in this group compared to the national average in Vietnam.

13%
N=1676 I have not heard of it



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Have you ever heard of the 3R concept (Reduce – Reuse – Recycle)?

♂ Male
N=115

♀ Female
N=78

27%

24%


46%

55%





Overall, this group possesses a basic understanding of the concepts of reducing, reusing, and recycling. However, their knowledge appears to be more theoretical than practical.

15-24
The Carefree Generation

N=193

To their perception, implementing 3R contributes:



N=1461

76%

Reducing waste collection, transportation, and disposal costs

87%

75%

Saving natural resources

83%

74%

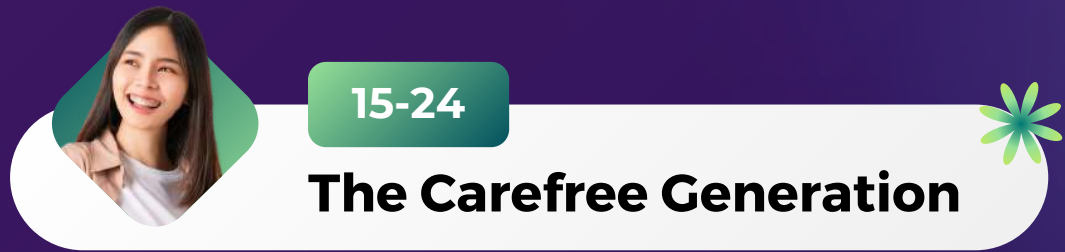
Preventing environmental degradation issues

83%

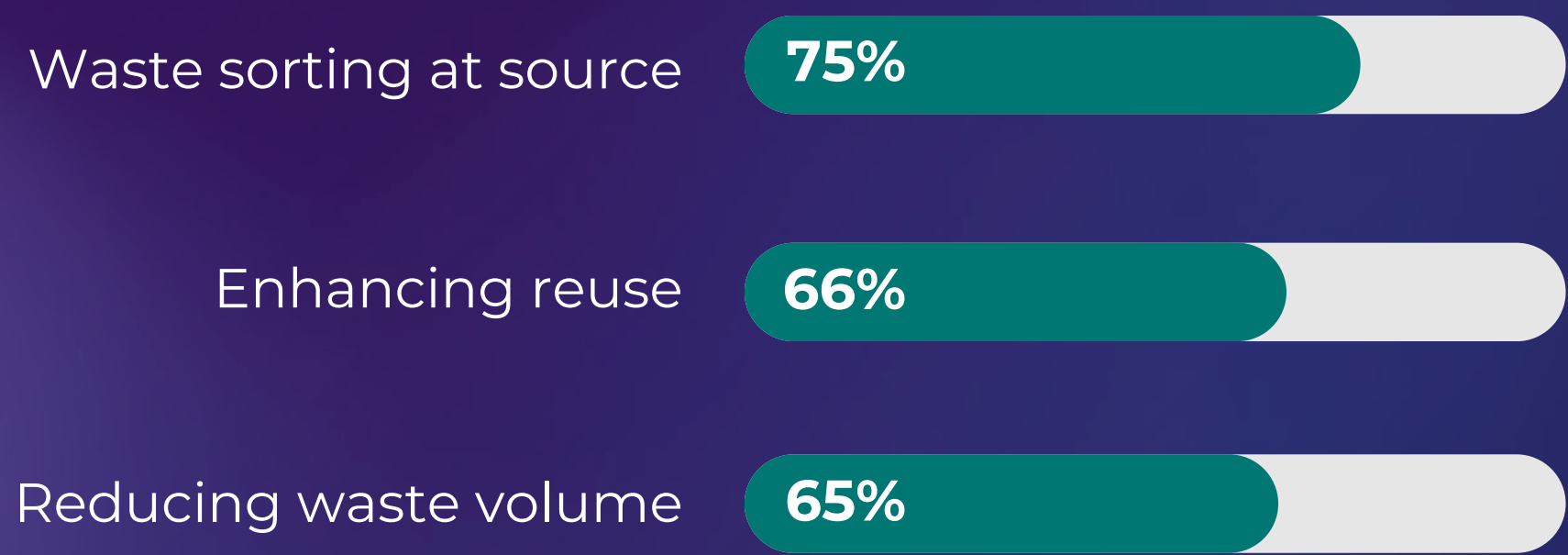




They seem to have a superficial understanding of the 3R concept, but they lack knowledge of its deeper significance.



And to them, to implement 3R (Reduce - Reuse - Recycle) in Vietnam, we start with



Top 3 things The Carefree Generation thinks waste sorting accomplish:

- 66%** Reduce waste discharged into the environment - save collection, transportation, and disposal costs
- 64%** Enhance awareness of environmental protection and rational use of resources
- 64%** Increase recycled waste, reuse, savings, and improve resource utilization efficiency



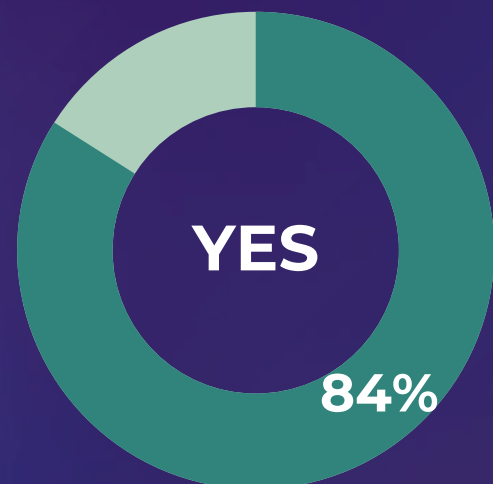
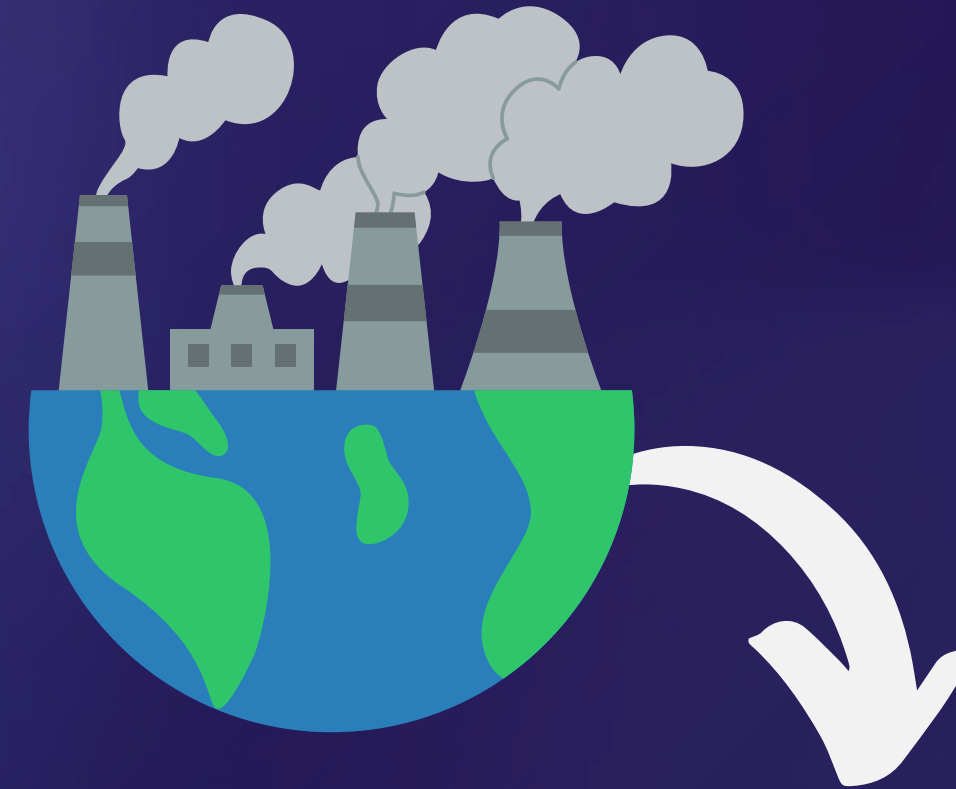
IN GENERAL...



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The Carefree Generation

When it comes to **recycling waste**, 75% of this group understands that its benefits include **minimizing environmental pollution**.



With these benefits of recycling, they **support** Vietnam should establish **regulations on mandatory use of recycle materials in products**.





When discussing recycled packaging, this group expresses willingness and support, understanding its environmental benefits. However, they have concerns about quality and high prices.




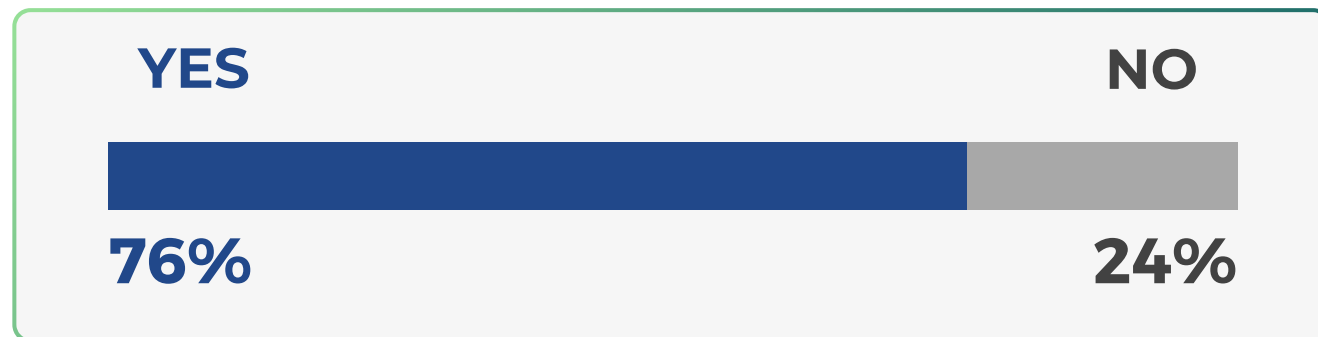

15-24

The Carefree Generation

N=193

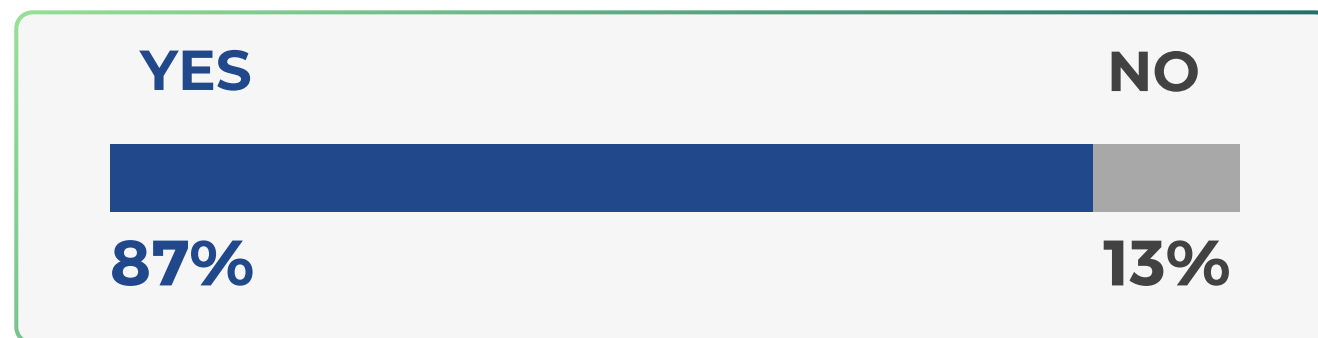
Would you prefer less attractive but recycled packaging over standard packaging for a product?


N=1676
YES
91%



Do you think using recycled products is good for the environment?

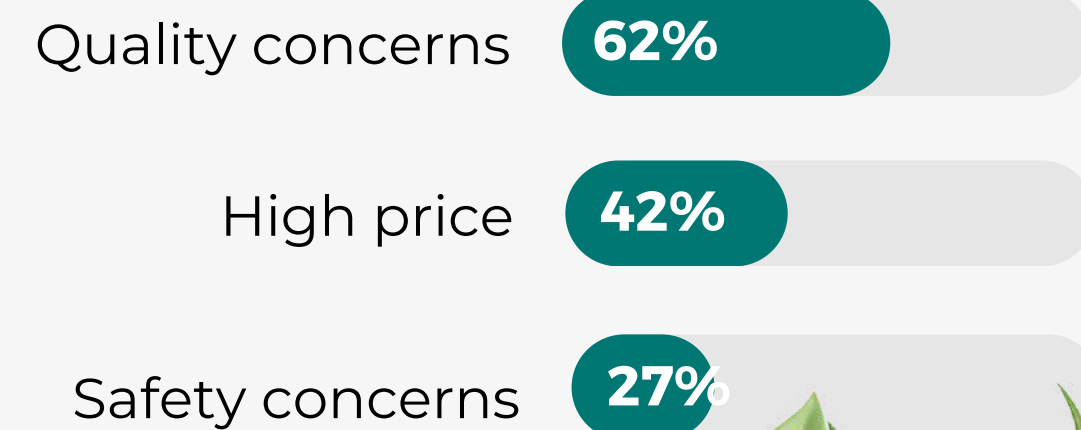

N=1676
YES
93%



What encourages you to decide to use a recycled product?



What makes you hesitant to use products made from recycled materials?



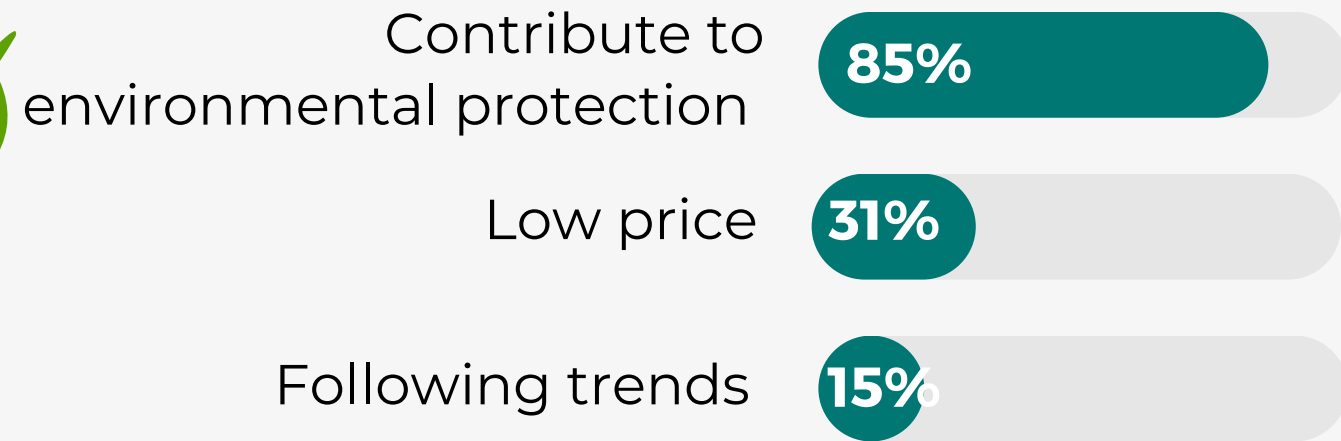


15-24

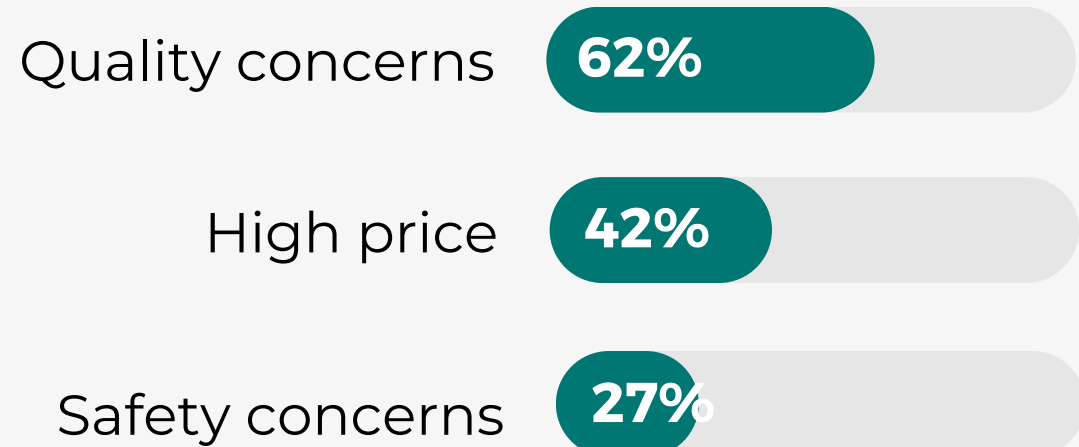
The Carefree Generation

N=193

What encourages you to decide to use a recycled product?



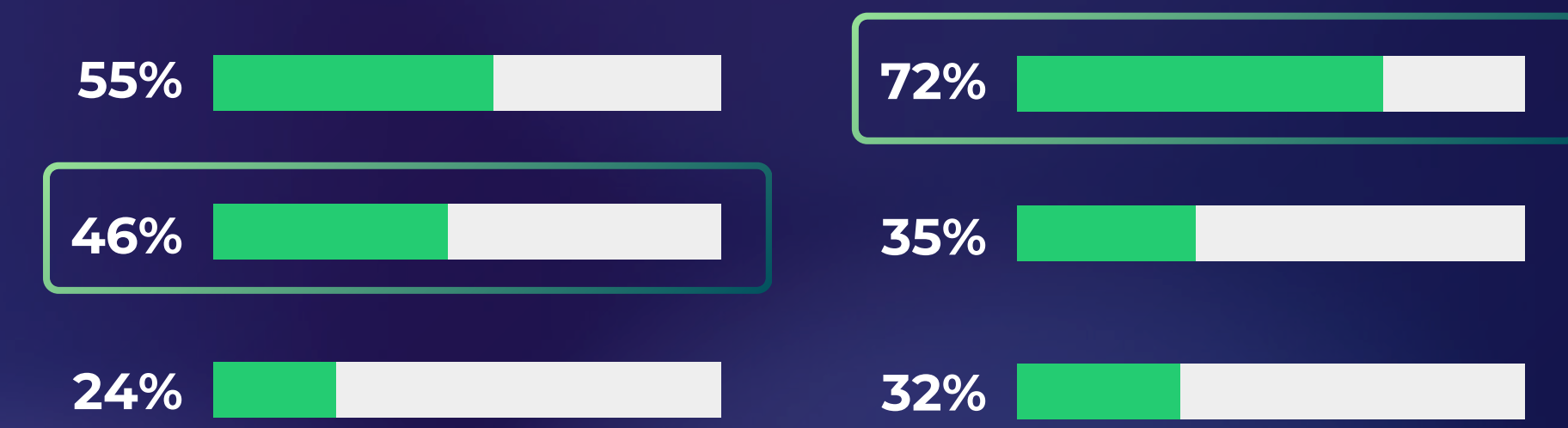
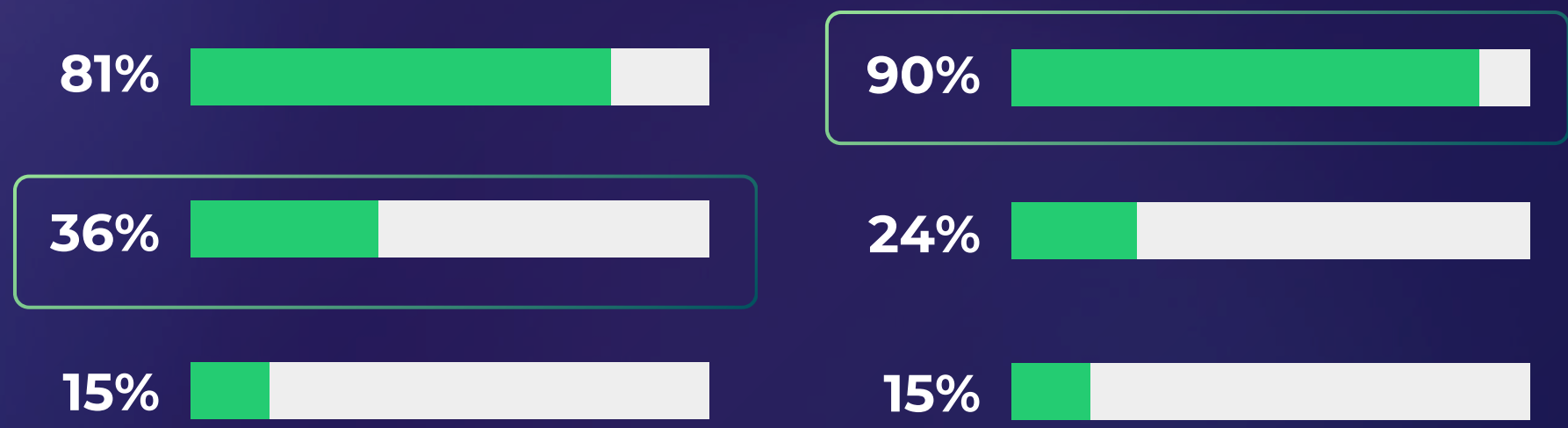
What makes you hesitant to use products made from recycled materials?



Specifically, females are more concerned about quality, while males are more worried about high prices.

♂ Male
N=115

♀ Female
N=78





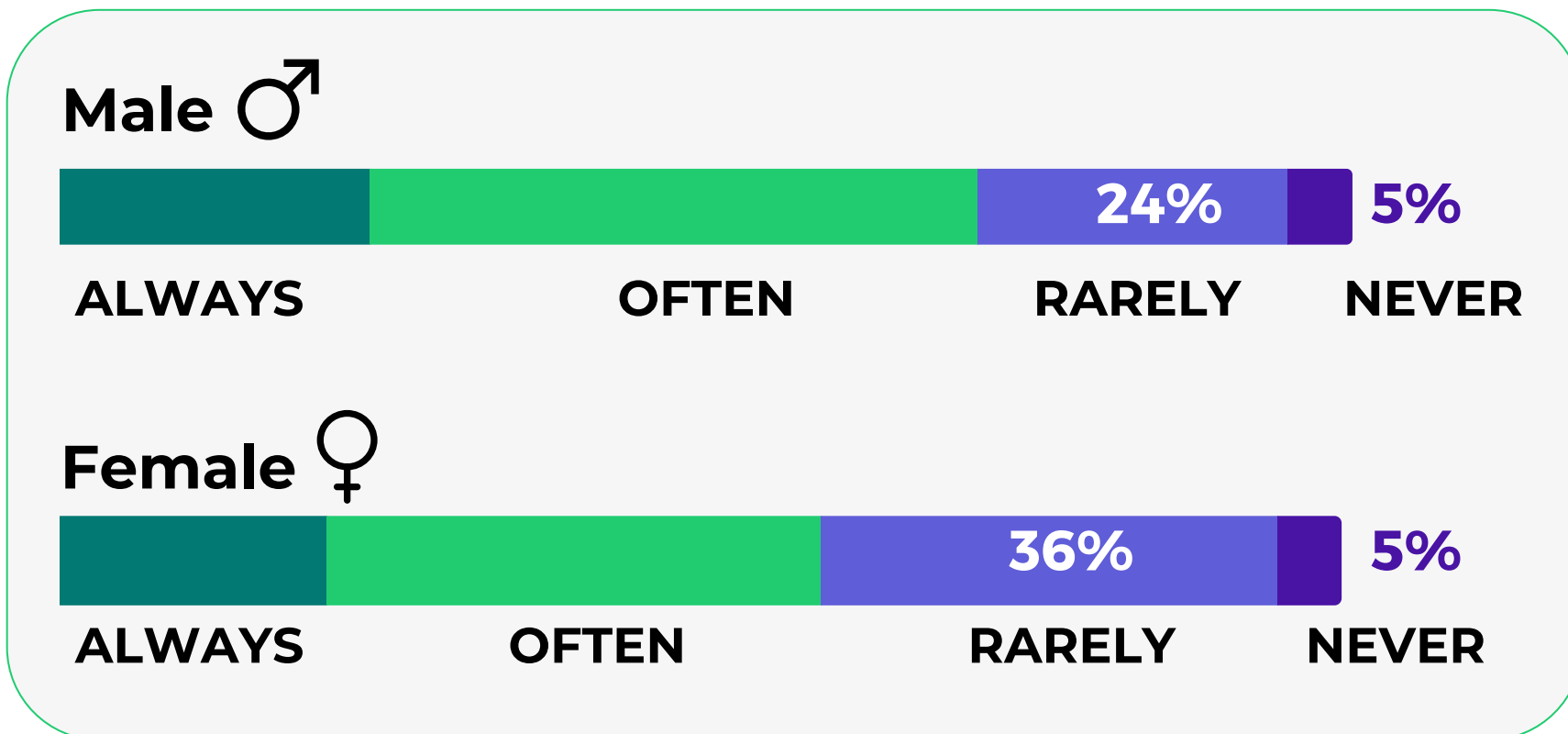
Captivatingly, young females rarely or never seek information about the eco-friendliness of product packaging when buying food or consumer goods.




15-24
The Carefree Generation
N=193



When buying food and consumer goods, do you **habitually seek information** about the **eco-friendliness of product packaging**?






However, the majority of this them expresses a willingness to reduce their use of single-use plastic products to minimize plastic waste.



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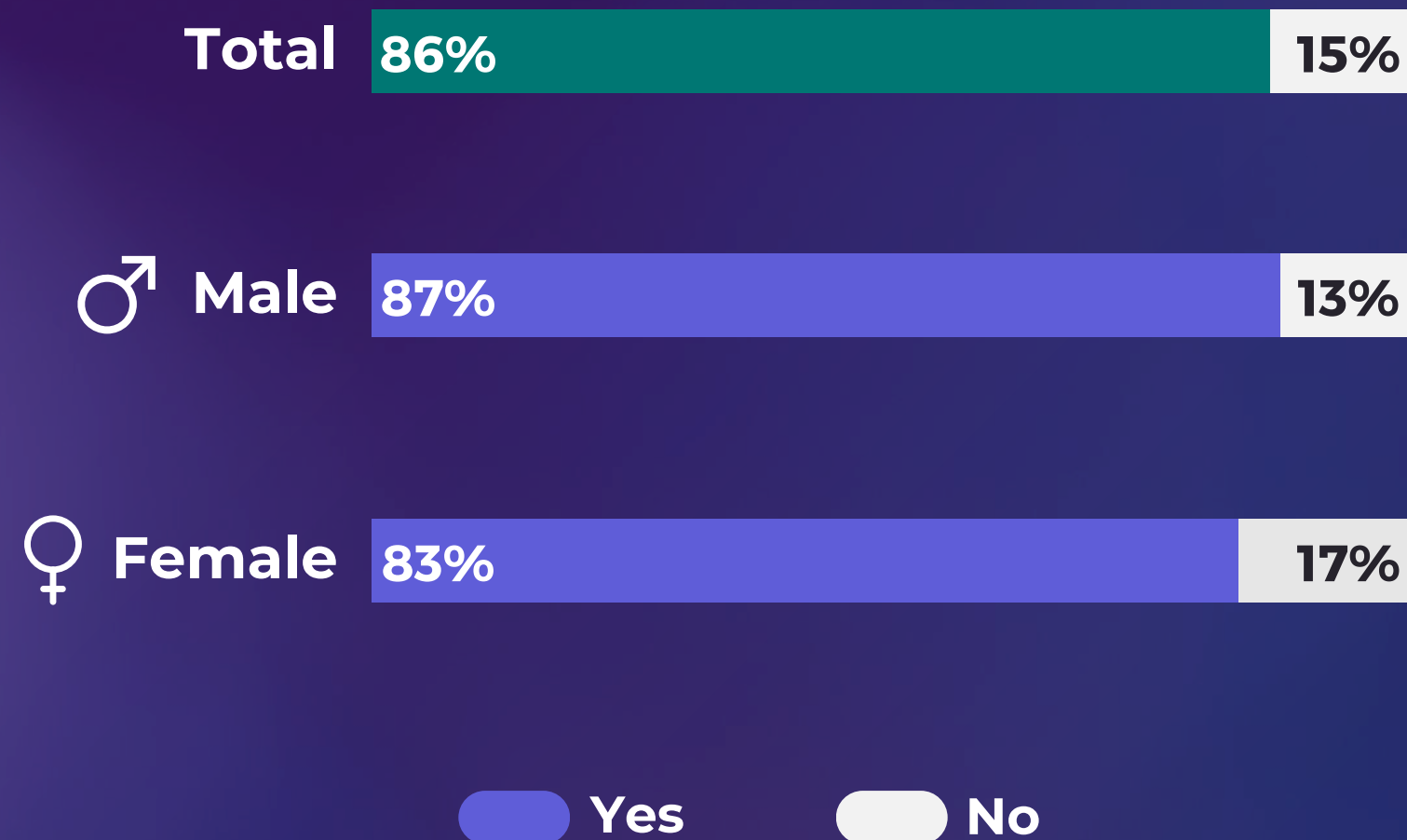


15-24

The Carefree Generation

N=193

Are you willing to reduce the use of single-use plastic products to minimize plastic waste?





They open to using costlier eco-friendly products, but their young age makes finances a concern.

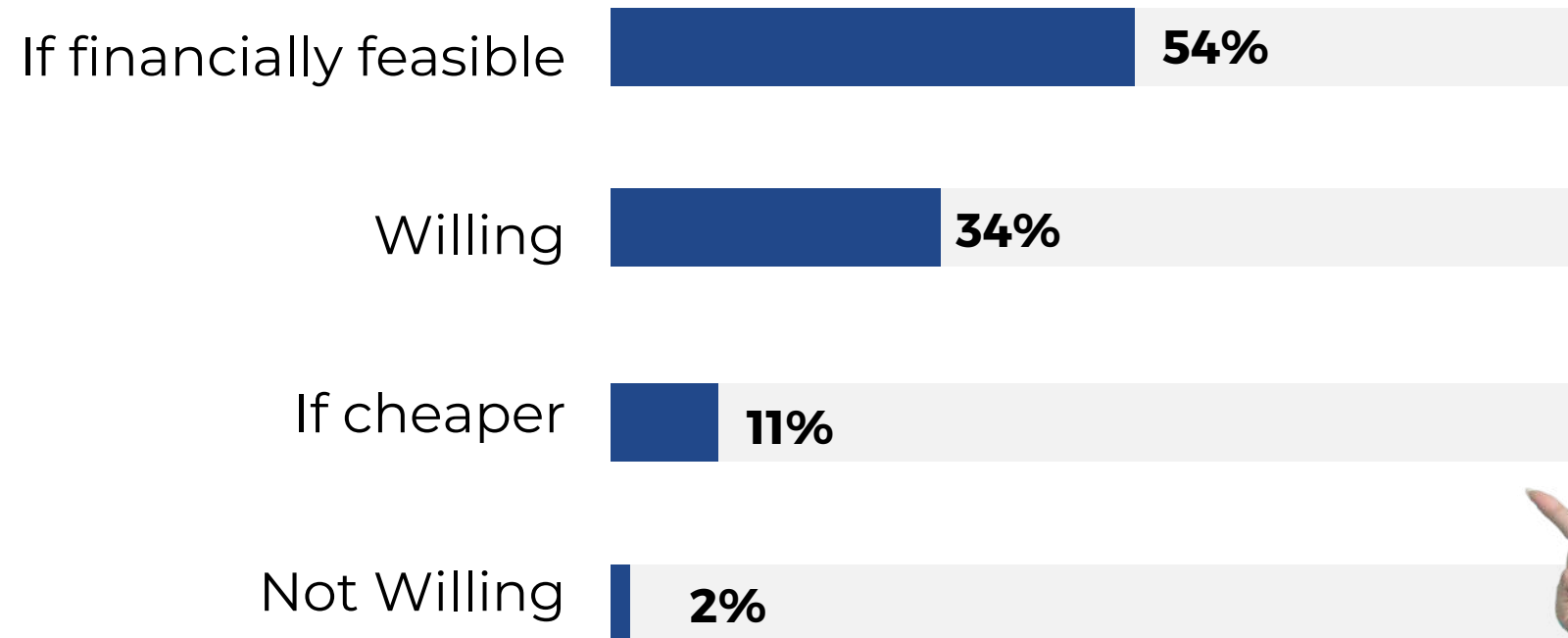


15-24

The Carefree Generation

N=193

Are you willing to use other environmentally friendly products even if they cost more than single-use plastic products?



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What factors influence your choice between various types of packaging for the same product





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The Carefree Generation Perception

on Waste Segregation



While they are willing to support waste segregation, they are often not responsible for sorting waste at home. This leads to less attention on the topic and a lack of awareness about the new policy in 2025.




15-24
The Carefree Generation

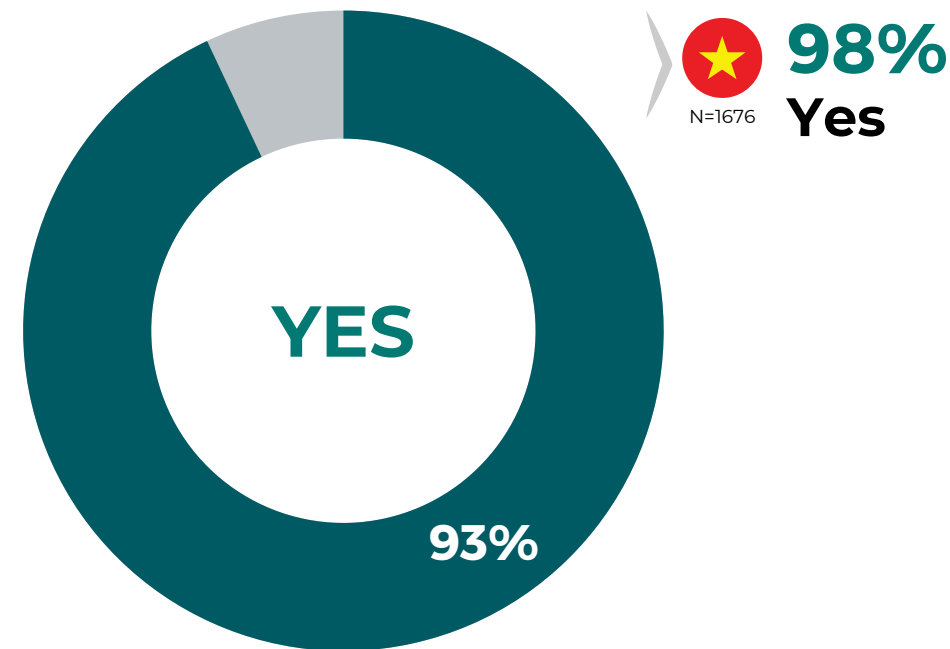
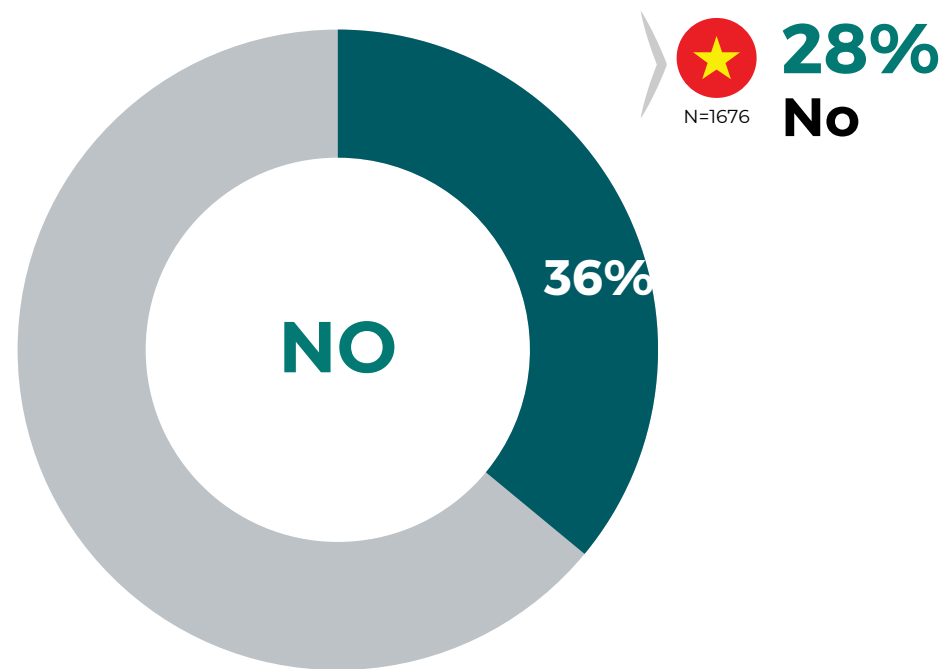
N=193

N=193

Are you aware that as of January 1, 2025, households must classify waste into 03 types:

Do you support waste segregation at the source?

And you, in your place of residence/house:
Do you personally segregate your garbage/waste?



**I am not aware of the new regulation
BUT I support waste segregation**

**It is just I do not personally segregate
my garbage/waste**



15-24

The Carefree Generation

N=165

What difficulties do you and your family encounter in the waste sorting process?

“

15.8%

Waste classification process takes a lot of time and cost

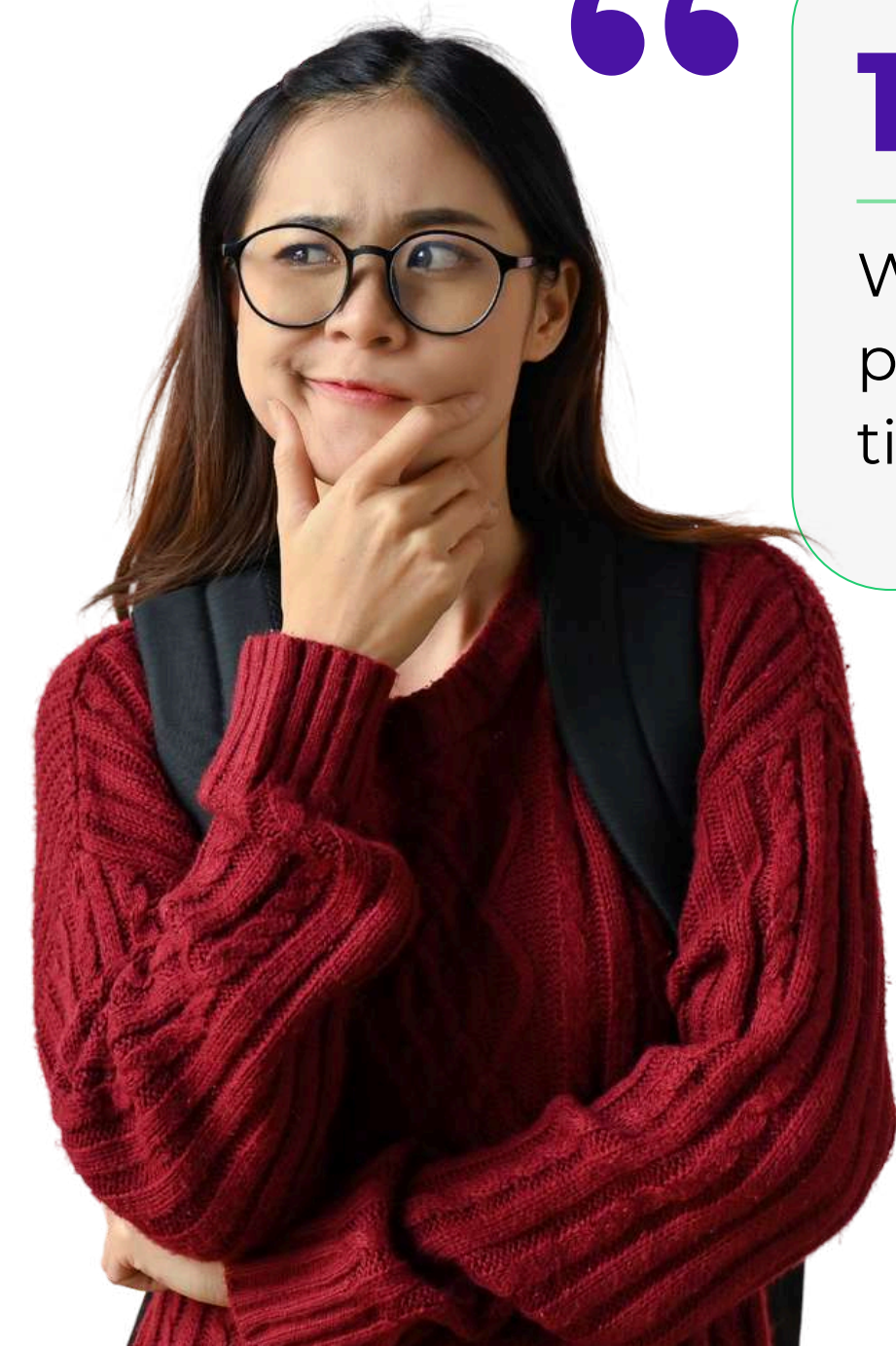
12.7%

Lacks understanding about the types of waste for classification

5.5%

Personally lacks knowledge and information about the process/method of waste classification

*Sample size based on those who personally sort waste at their residence





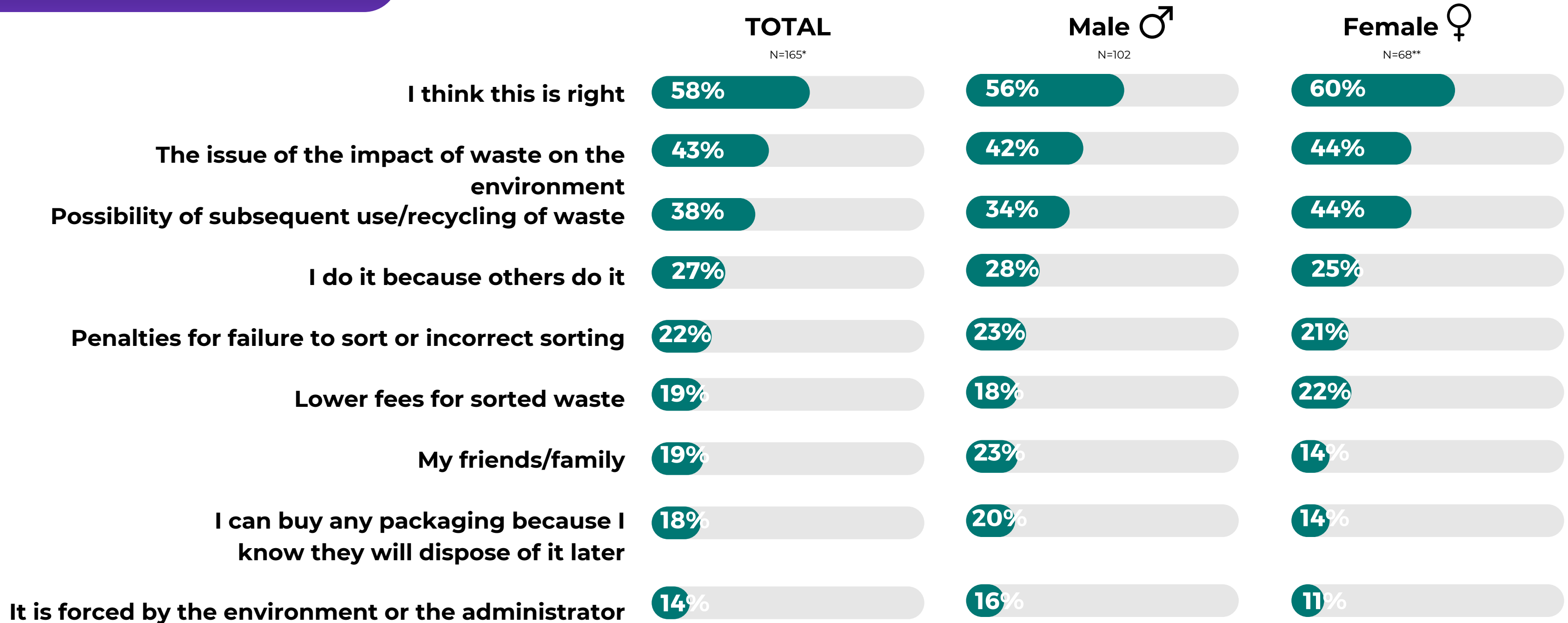
A notable gender difference is observed in the motivation for recycling: 44% of females compared to 34% of males are driven by the possibility of subsequent use/recycling of waste, indicating a stronger inclination among young women towards recycling benefits.



15-24

The Carefree Generation

What motivates you to segregate waste at home



*Sample size based on those who personally sort waste at their residence

**Small base

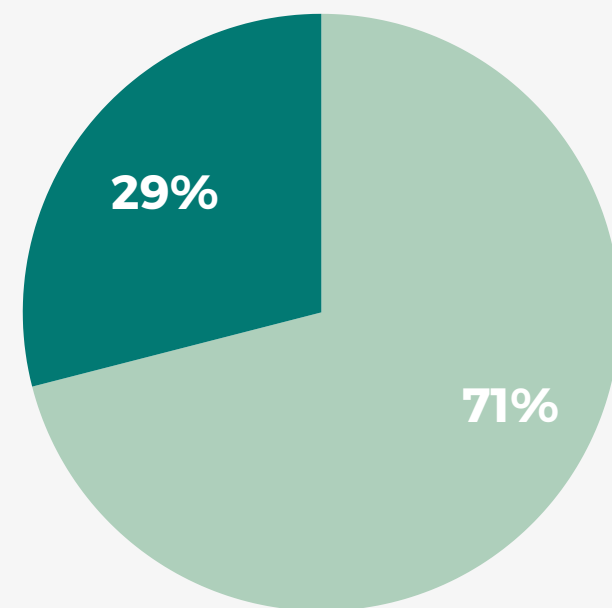


Information Needs

of Waste collection, segregation
in households, localities



Do you feel you have the knowledge and information you need about your city's waste sorting program to sort effectively? N=193



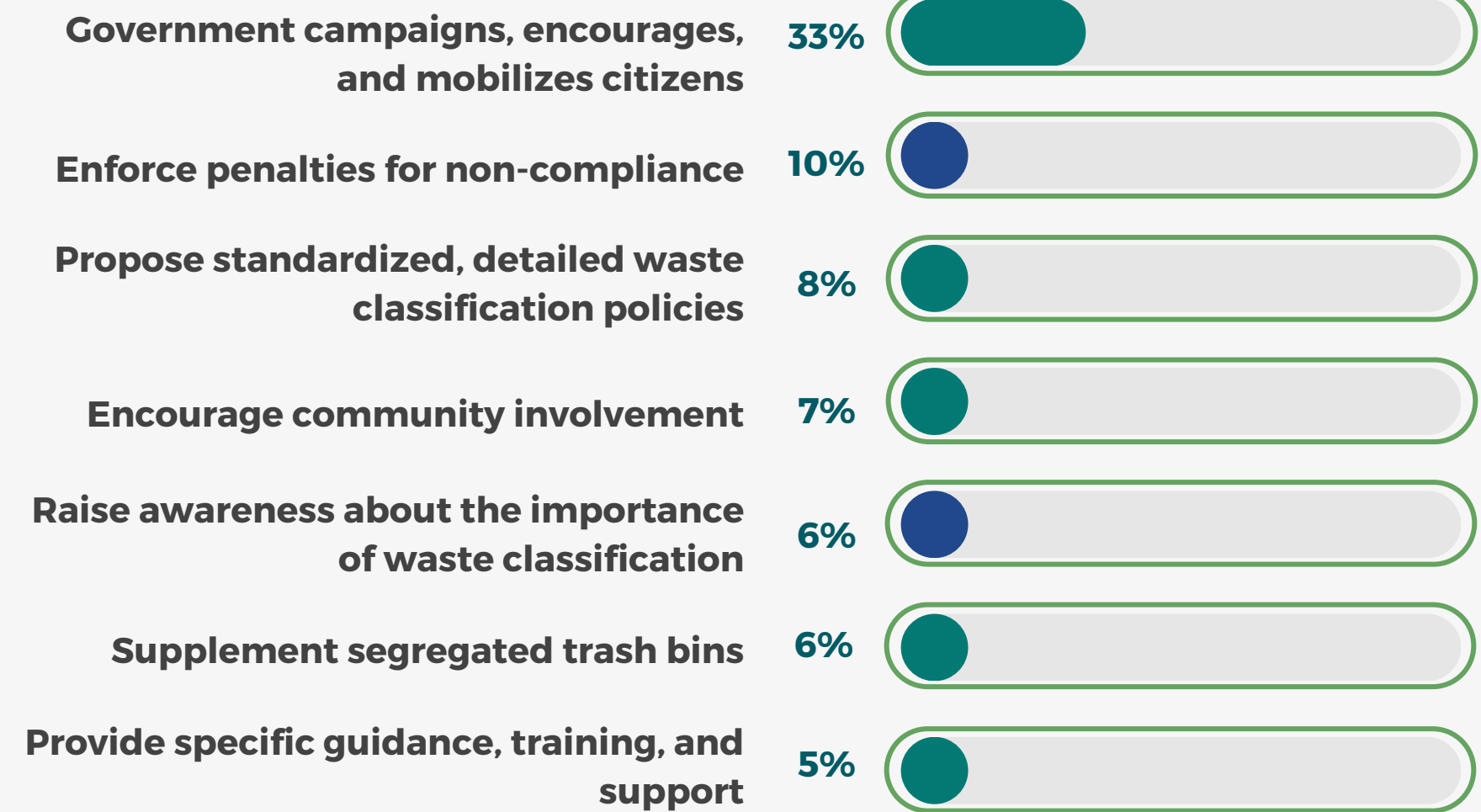
Perceived knowledge about the city's waste sorting program among this group **falls below** the national average in Vietnam.



Yes No

In your opinion, what should local authorities do to encourage you and your family to sort waste?

Top 7

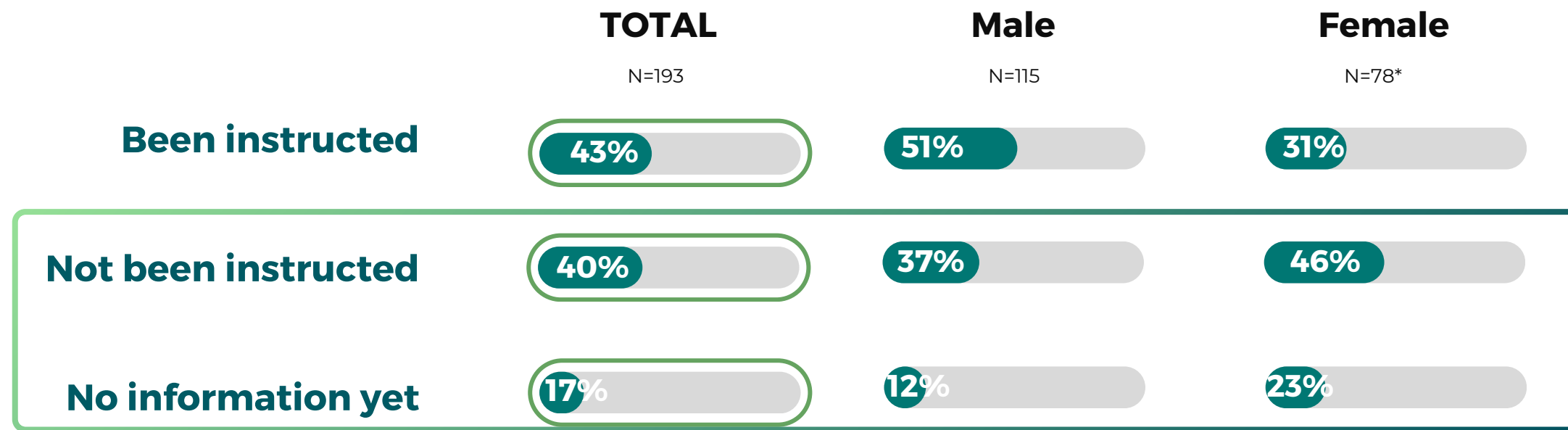




Waste Segregation Instruction from the local government



Have you been instructed on waste sorting and when to do it by the local government where you live?



*Small base



57%

of the surveyed Carefree Generation have not been instructed and have no information on waste sorting and when to do it by the local government where they live





Waste sorting information Expectation from local authorities



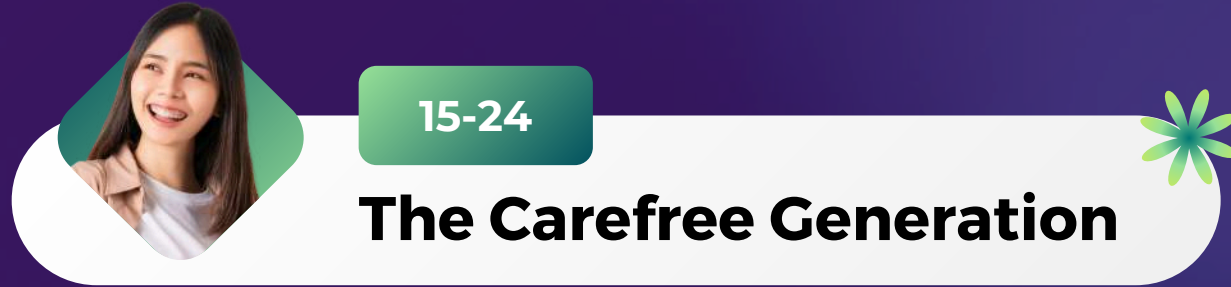
What are the best ways to inform you about garbage collection updates?





Executive Summary - 3R Concept

Awareness



AWARENESS AND UNDERSTANDING OF THE 3R CONCEPT & WASTE SEGREGATION

- This group is aware of environmental issues but shows a lack of interest in engaging deeply with them.
 - They are more likely to pay attention if provided with new knowledge and valuable information.
 - Their awareness of the 3R concept exists, but it lacks depth and detailed understanding.
 - When it comes to waste segregation, their awareness of the new 2025 policy is lower than that of the total surveyed Vietnamese population. However, they are aware of and support waste segregation at the source. Only 15% do not personally sort waste, while 52% only sort some of it, indicating minimal overall attention to waste segregation. They require more information to understand waste classification better.
-



Executive Summary - Perception of Recycling Benefits

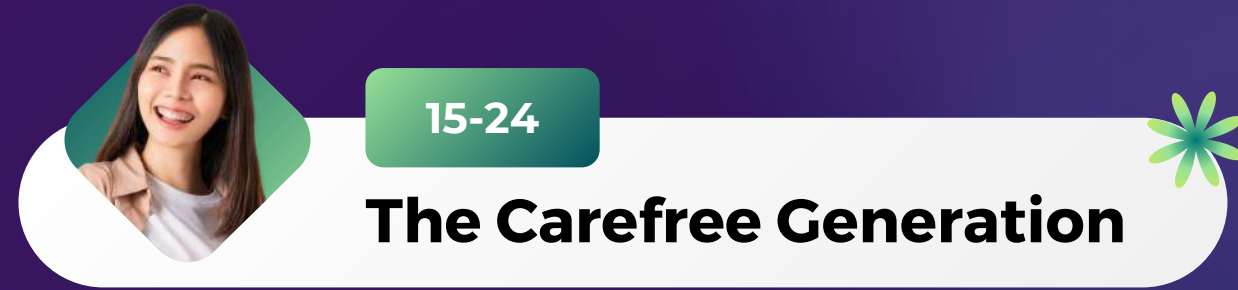


PERCEPTION OF RECYCLING BENEFITS

- **Males:** For males, the primary appeal of recycling lies in its economic advantages. A significant 77% believe that recycling leads to substantial cost savings by reducing expenses related to waste collection, transportation, and disposal. This economic perspective highlights a pragmatic approach among males towards recycling, focusing on the tangible financial benefits.
 - **Females:** In contrast, females show a stronger inclination towards supporting environmental regulations. A striking 86% endorse the mandatory use of recycled materials in products, underscoring their commitment to regulatory measures that enforce sustainable practices. This support suggests that females are more likely to advocate for systemic changes to enhance environmental protection.
-



Executive Summary - Perception of Recycling Benefits



The Carefree Generation

BARRIERS TO USING RECYCLED PRODUCTS

- **Males:** The primary barrier for males in adopting recycled products is their cost. With 46% citing high prices as a significant deterrent, it is clear that economic considerations heavily influence their purchasing decisions. This highlights the need for more affordable recycled products to encourage wider adoption among male consumers.
 - **Females:** Quality concerns dominate the reservations females have about recycled products. About 72% express apprehension regarding the potential lower quality of recycled items. This indicates that for females, ensuring high standards and reliability in recycled products is crucial for increasing their acceptance and use.
-



Recommendations

FOR BUSINESSES



TARGETED MARKETING STRATEGIES

Simplify and highlight waste segregation importance.

Introduce fun learning about waste classification.

- **For Males:** Emphasize the cost-saving aspects of recycled products and the financial benefits of waste reduction. Highlight how using recycled products can lead to long-term savings.
- **For Females:** Focus on the environmental benefits and quality assurance of recycled products. Ensure marketing messages address and mitigate quality concerns, possibly through third-party certifications or quality guarantees.

PRODUCT DEVELOPMENT

- Develop and market eco-friendly products that are competitively priced to appeal to cost-conscious male consumers.
- Invest in high-quality recycled materials and emphasize this in product labeling and advertising to attract female consumers concerned about quality.



Recommendations

FOR LOCAL AUTHORITIES



ENHANCING AWARENESS AND PARTICIPATION

- Information Campaigns: Use diverse communication channels, including residential mail, social media, and national television campaigns, to increase awareness about waste segregation and recycling .
- Educational Programs: Organize training sessions and distribute educational materials focusing on the benefits and methods of effective waste segregation. Tailor content to address the specific concerns of males and females.

POLICY & REGULATION

- Implement and enforce regulations mandating the use of recycled materials in products, supported by a robust monitoring and quality assurance framework to address consumer quality concerns.
- Provide incentives for businesses that adopt sustainable practices and promote the use of recycled products through subsidies or tax breaks.

COMMUNITY ENGAGEMENT

- Foster community involvement through local events and initiatives that encourage waste segregation and recycling. Highlight the collective benefits and create platforms for sharing success stories and best practices.
- Utilize influencers and community leaders to drive participation and spread awareness about the importance of environmental protection.



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Thank You!

