



# Green Industries SA

## Heavyweight Plastic Bag Research

July 2023 | REF 12347

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RESEARCH. STRATEGY. SOLUTIONS.

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# About this research

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Research was conducted between 1<sup>st</sup> May and 22<sup>nd</sup> June 2023



The purpose of this research is to provide a comprehensive understanding of shopping bag usage among South Australians, including thicker plastic bags as well as bags made from other materials.

With South Australia's commitment to a more sustainable future, a ban on thicker plastic shopping bags will be introduced in September 2024, representing a significant step toward achieving a circular economy.

By investigating the current state of shopping bag usage, this study contributes to the knowledge base necessary for ensuring a seamless and successful implementation of the impending ban.

Metro and regional differences have been identified and noted in the quantitative results (see pages 30-35). Regional representation was achieved in both the quantitative and qualitative portions of the research, with focus groups having 2-3 regional South Australians in each user segment discussions.



Different types of thicker plastic bag users were identified through the research, forming three key segments by which the data in this report has been analysed – regular, occasional, and non-users. These segments formed the basis for the staged, multi-modal approach to the research outlined below:

1. Behavioural observations and intercepts across different shopping settings and locations
2. Quantitative online survey with a representative sample of n=1000 South Australians (split into metro n=800, regional n=200)
3. Three qualitative focus groups held online via Zoom with regular users, occasional users and non-users of thicker plastic bags

Market research activities have been conducted in accordance with ISO 20252.

# Guide to reading this report

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Findings are reported at the total population level, with mentions of demographic and other groups when statistically significant.

Due to rounding, some answers in single-response questions may not add up to exactly 100%. Additionally, percentages in multiple-response questions may sum to over 100%, as this is based on the number of respondents rather than the number of responses.

Averages in this report represent the mean values calculated from the responses of the participants, excluding any "don't know" responses. Averages show the most common answer along a 5-point scale question.



Commentary is made where relevant on high versus low-income earners. 'High income earners' are those who have a gross household income of \$100,000 or more, while 'low-income earners' are considered to be households earning less than \$40,000 before tax.

Throughout this report, the term 'percentage point' (pp) will be used to quantify the absolute difference between two percentages, providing a precise measure of change. It is important to note that percentage point (pp) is not the same as a percentage (%). While a percentage is a number or ratio expressed as a fraction of 100, a percentage point (pp) refers to the difference between two percentages.

# Executive summary

Across all user types, 77% reported using a thicker plastic bag for any purpose, while under three in ten (27%) indicated a preference for them. Six in ten (60%) South Australians are occasional users of thicker plastic bags, while a quarter (25%) are non-users, and one in five (20%) use them regularly.

## Bag usage and preferences

Overall, majority of South Australians engaged in regular grocery shopping and top-up shops (i.e., at least once a week), with 77% reporting the use of thicker plastic bags, particularly for retail shopping. Non-woven polypropylene bags are more commonly used for grocery shopping, while takeaway food is often placed in paper bags. Interestingly, although usage of the thicker plastic bags was relatively high, only 27% preferred this type of bag overall. This indicates a 50pp difference between usage and preference, although preference was significantly higher among regular users (62%). Regular users prioritised convenience and practicality of shopping bag availability. Occasional users displayed varying levels of consciousness regarding bag usage, often relying on store-provided bags due to forgetfulness and greater consideration for price due to cost-of-living pressures. Non-users demonstrated a strong commitment to sustainability, actively choosing reusable bags and employing various strategies to reduce their reliance on plastic bags.



## Environmental consciousness

Overall, there was a high level of environmental consciousness among South Australians, with agreement ranging from 71% to 86% across various metrics. However, there was lower environmental consciousness among those opposed to the ban and regular users. Non-users consistently showed strong environmental consciousness through high levels of agreement across all statements tested. Regular users acknowledged the environmental impacts of plastic waste but noted the various ways in which plastic bags can be reused and repurposed. They believed that the responsibility to reduce plastic waste should primarily rest with producers rather than consumers. Occasional users recognised negative consequences of plastic waste but found their availability convenient. Non-users held the environment as one of their core values, expressing frustration with excessive plastic packaging.

# Executive summary cont.

Overall strong support for the ban from nearly seven in ten (68%), higher among those aware of the ban (73%) and softer among regular thicker plastic bag users (52%).

Acceptance/ purchase of thicker plastic bags was higher for retail shopping (80%) compared to grocery (70%) or takeaway food shopping (67%). Regular users demonstrated a higher incidence of purchasing thicker plastic bags due to a preference for them (36%). Occasional users indicated their own disorganised behaviour led them to purchasing/ or accepting a new bag (76%), followed by 56% of non-users. In situations where users might decline or choose not to purchase a new bag for their shopping, over half (51%) across segments said it was not necessary if they had only a small number of items, and just under half (49%) said they often didn't want to accumulate more bags, as they already had a lot at home. Responses from those in the focus groups validated that preference, forgetfulness and unplanned shopping trips among regular users lead to frequent purchases of plastic bags. Convenience outweighed environmental concerns for this segment. Occasional users shared similar patterns, often experiencing guilt while accepting plastic bags but relying on retailer-provided bags for their convenience. Non-users, demonstrated a strong commitment to sustainability, consistently bringing their own bags from home to avoid plastic bags.



Findings showed strong support for the ban on thicker plastic bags in South Australia, with 83% not opposed to the ban. Over two-thirds (68%) expressed their support for the ban, with regular users showing softer support at 52%. Awareness of the ban was low to moderate at 36% across all user segments. Considering that awareness was found to be positively correlated with support (73%), this indicates the need for increased public awareness efforts to allow impacted users time to implement strategies to facilitate the transition to other alternative bag types. The qualitative analysis further provided insight into specific concerns and sentiments of different user groups. Regular users expressed concerns about durable alternative options, while occasional users and non-users emphasised the necessity of the ban and anticipated a smooth transition.





# Quantitative Research

# Segments

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Overall, majority of South Australians are occasional users of thicker plastic bags, with over half (55%) belonging to this segment.

A quarter (25%) of the population do not use thicker plastic bags, and one in five (20%) identified as regular users.

In some cases, there are strong attitudes and values that underpin this behaviour, while in other cases there are other factors such as convenience, affordability, and established habits that influence the behaviour. This report uncovers these enablers and barriers to help understand the differences and thus how to influence the end behaviour.

The user segments have been identified as follows:



Under 40s were more likely to be part of the regular user segment (27% compared to 16% over 40s), while over 40s had a similar likelihood of belonging to the non-user segment. Over three in ten (31%) low-income households identified as non-users of thicker plastic bags, compared to 18% of high-income households.

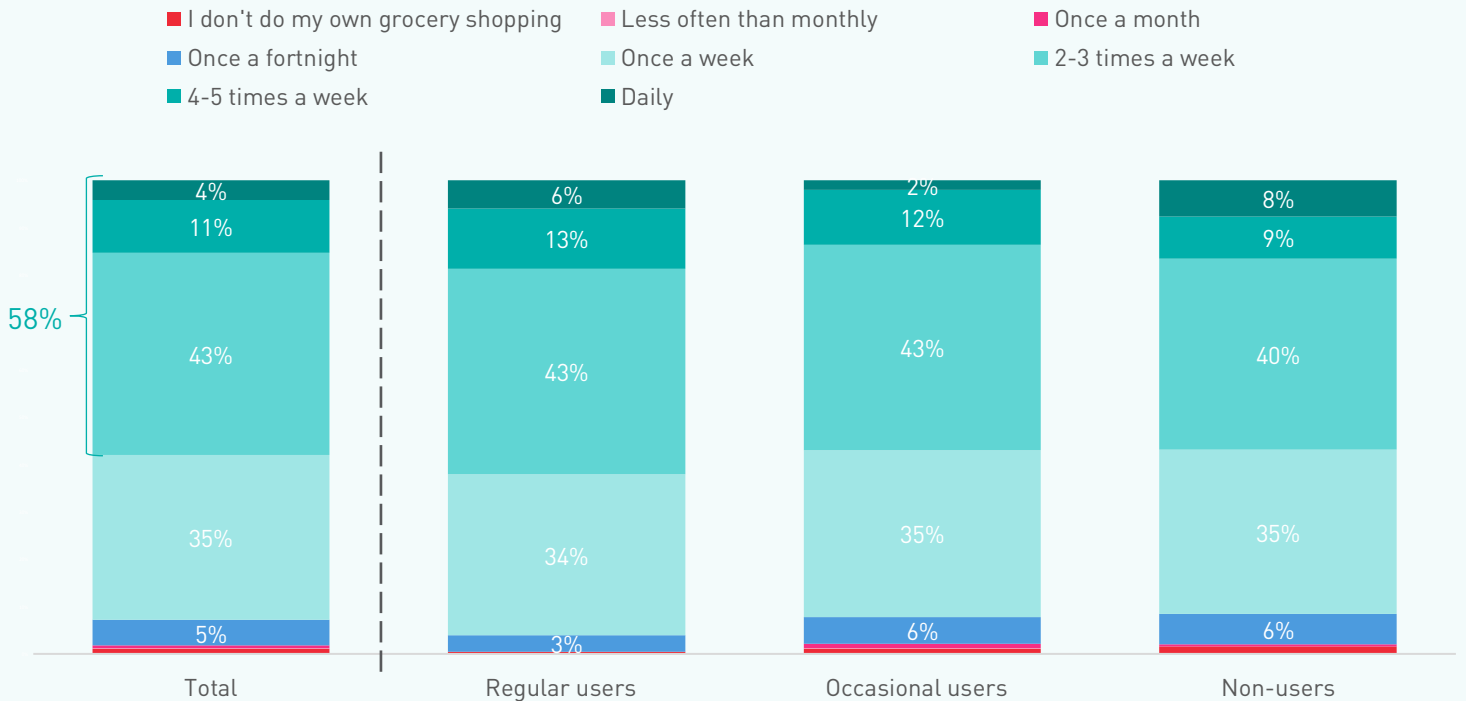


# Grocery shopping behaviour and habits

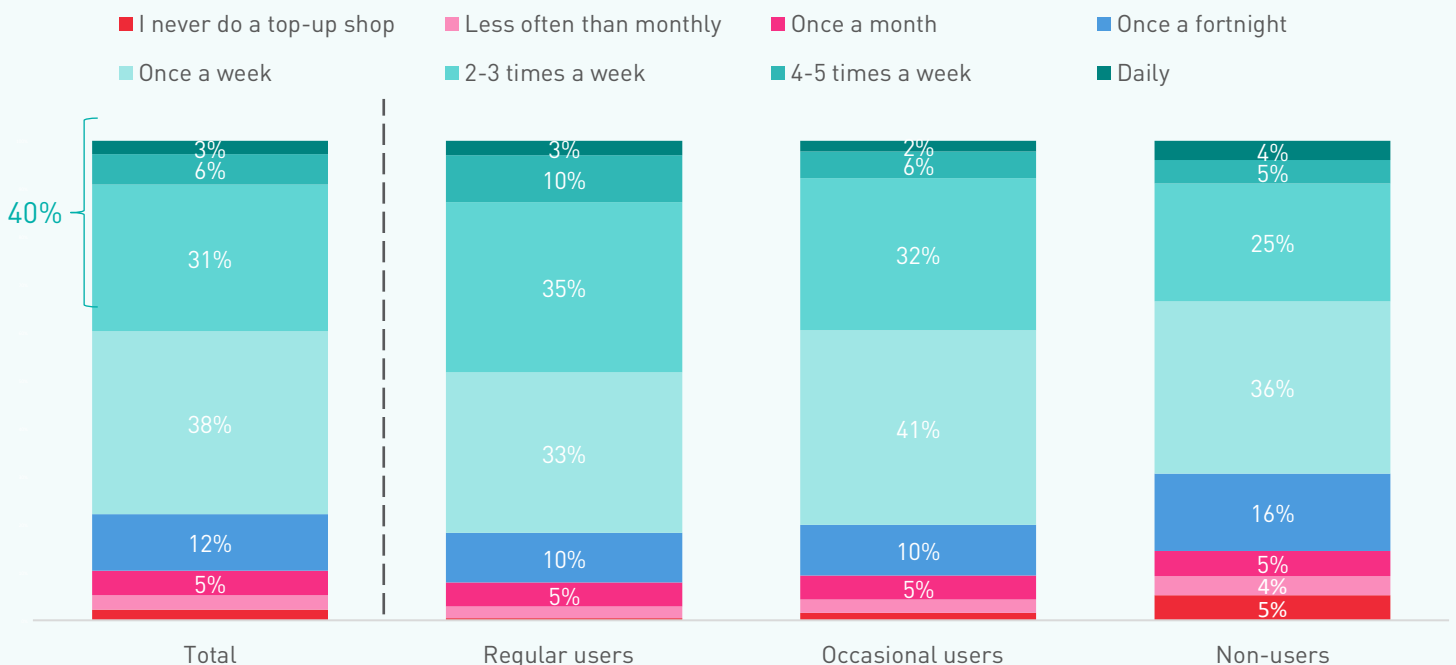
Almost six in ten (58%) do their regular grocery shopping a few times a week, while four in ten (40%) reported doing a top-up shop in between their regular grocery shops a few times a week.

13% of those who indicated that they do not reuse the thicker plastic bags also reported doing a top-up shop for their groceries on a daily basis. This could mean that this cohort may be buying and disposing of their shopping bags each time, although this could refer to thicker plastic bags, paper bags, or compostable bags depending on where the person usually shops.

## Frequency of regular grocery shops



## Frequency of top-up grocery shops



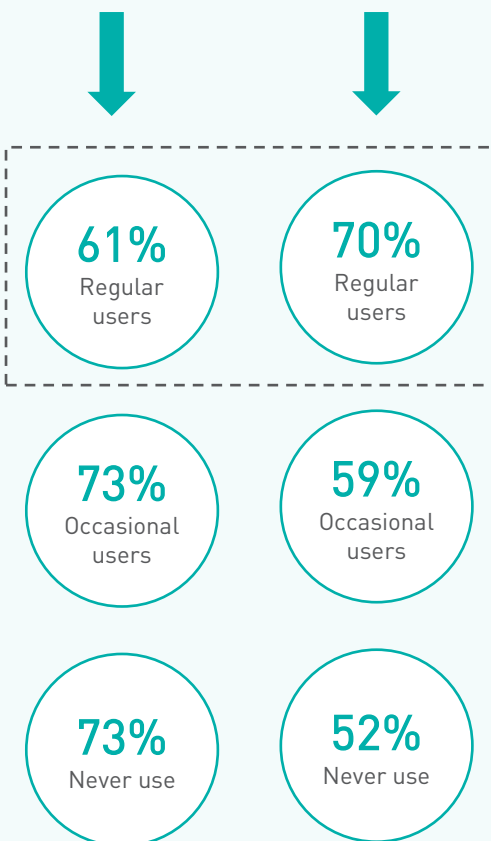
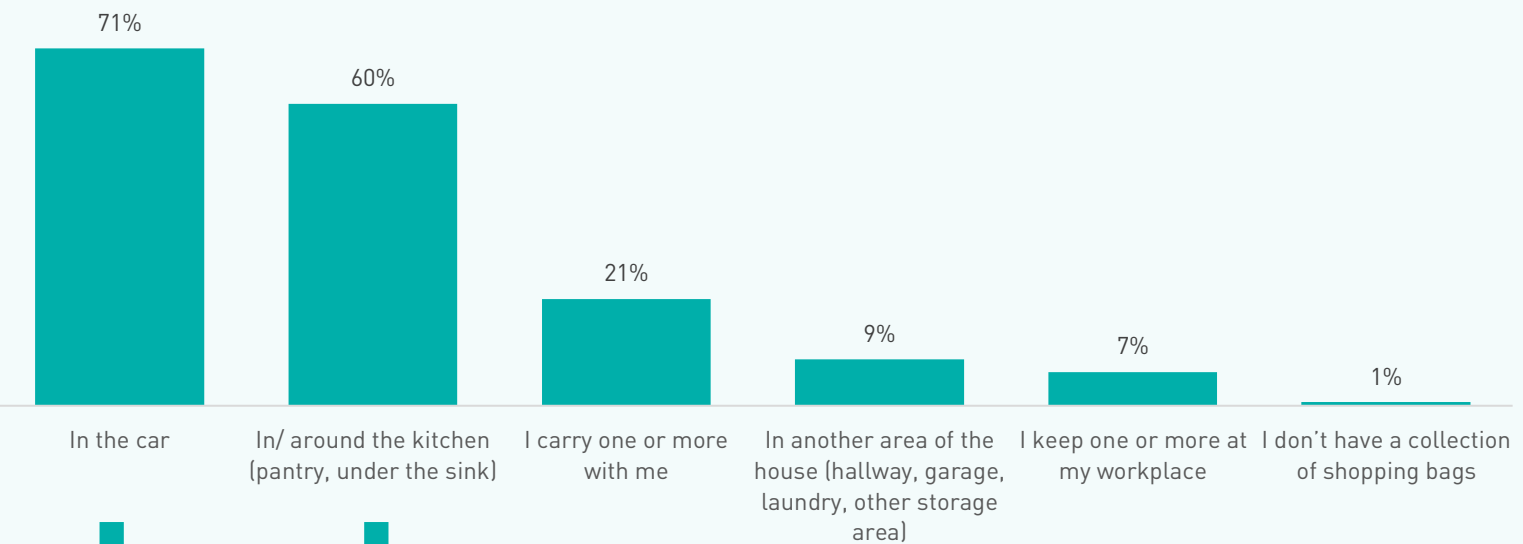
# Bag behaviour and habits

Over seven in ten (71%) keep their reusable shopping bags in their car, although this was significantly lower among regular users of thicker plastic bags.

This finding was significantly lower among the regular user cohort.

Around seven in ten (68%) under 40s kept their reusable bags in/ around the kitchen, while those aged 40+ kept them in the car (79%) or carried one with them (24%).

## Accessibility of bags



Regular users of thicker plastic bags were more likely to keep their bags in or around the kitchen compared to the occasional or non-users who were more likely to have a collection of bags in their car.

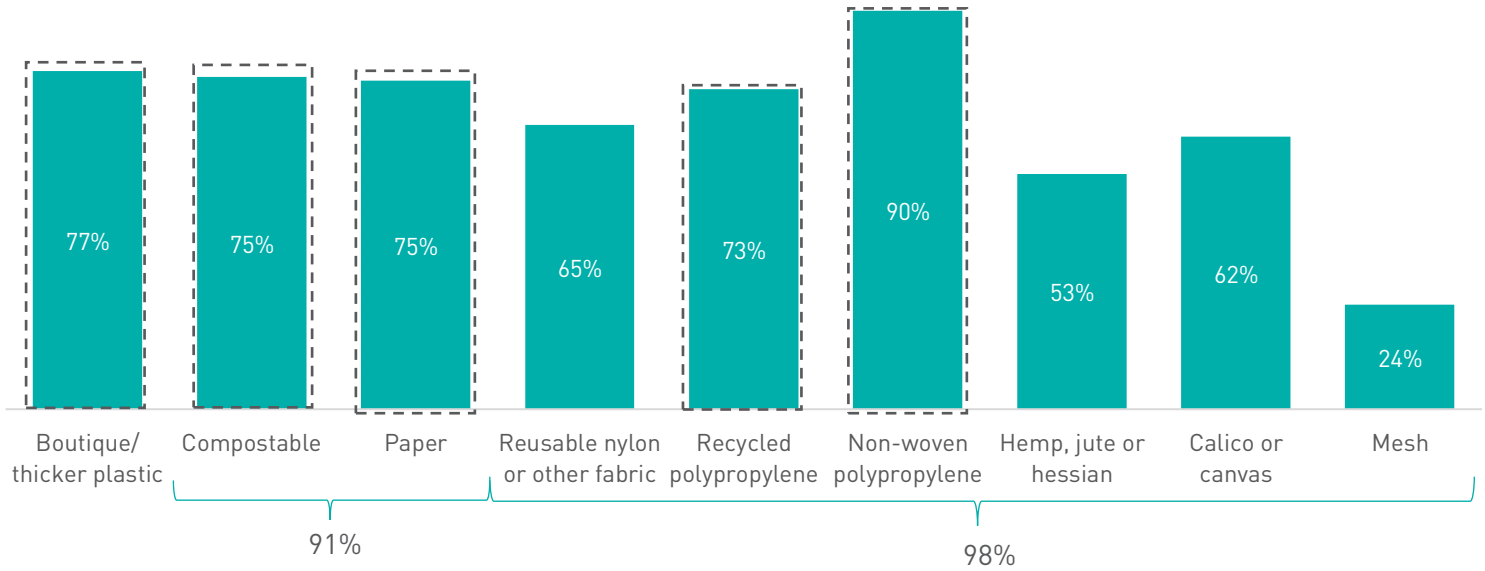
This finding indicates a difference in behaviour of the regular users in the stages prior to shopping that more likely facilitates the purchase of new bags.

# Usage of different types of bags

Almost all South Australians (98%) already have an alternative type of reusable bag in their possession.

Almost four in five (77%) reported using the thicker plastic bags for any purpose, with its use in retail shopping (38%) being higher compared to other bag types. Non-woven polypropylene bags had a higher likelihood of being used for grocery shopping (81%), while takeaway food was mostly put into paper bags (16%).

Uses this type of bag for any purpose (shopping, food, or other)



Direction of comparison Low usage → High usage		Purpose of use				
		Grocery shopping	Retail shopping	Take away food	A different purpose	Don't use this type of bag
Bay type	Boutique/thicker plastic	41%	38%	15%	11%	24%
	Compostable	43%	7%	11%	25%	25%
	Paper	54%	26%	16%	6%	26%
	Reusable nylon or other fabric	43%	33%	4%	8%	37%
	Recycled polypropylene	59%	23%	3%	8%	29%
	Non-woven polypropylene	81%	27%	6%	5%	10%
	Hemp, jute or hessian	42%	15%	3%	6%	47%
	Calico or canvas	30%	29%	4%	16%	39%
	Mesh	18%	4%	2%	3%	77%

# Boutique/ thicker plastic bag use by segments

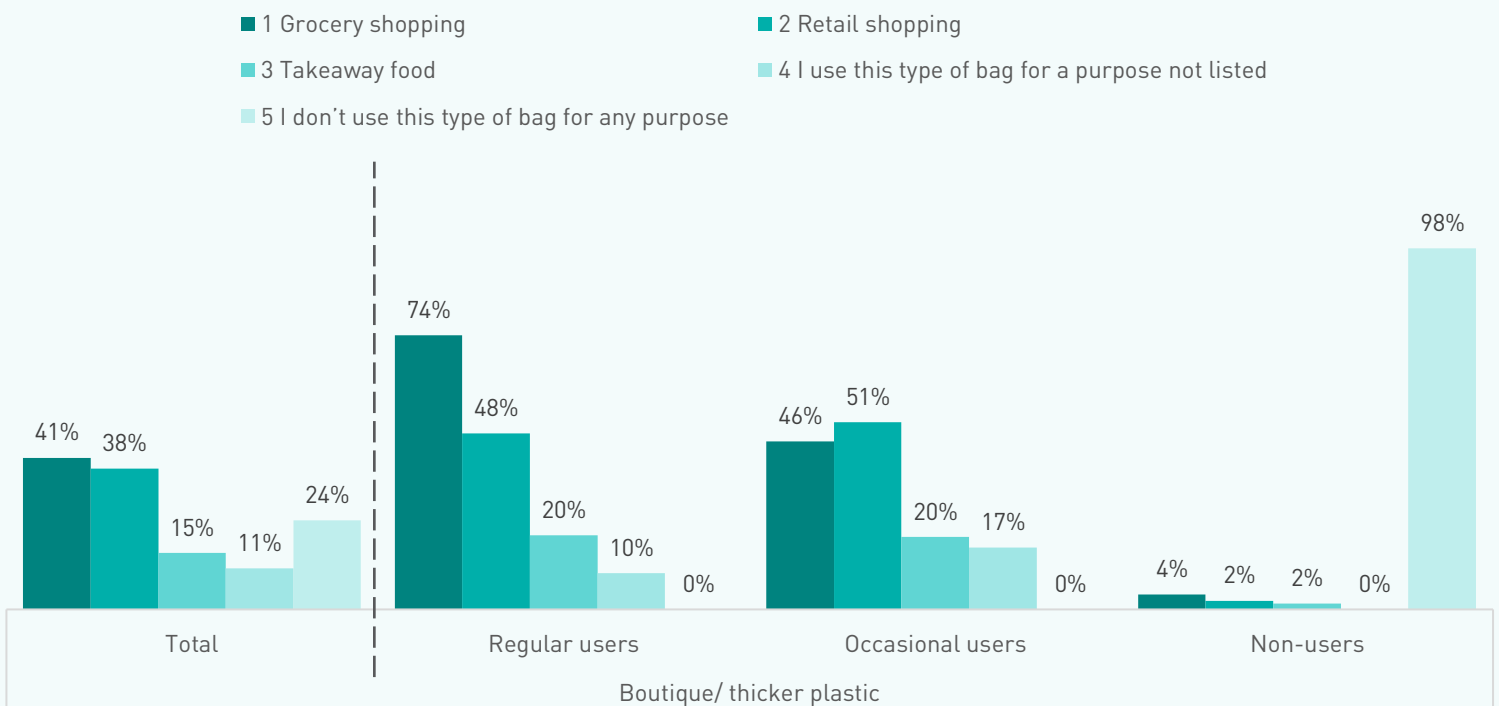
Over seven in ten (74%) regular users use a thicker plastic bag for their grocery shopping.

Around half (51%) of the occasional users were more likely to use a thicker plastic bag for retail shopping, while 74% of regular users use a thicker plastic bag for their grocery shopping. These findings indicate that while regular users will be most impacted during their grocery shopping trips, occasional users will be more highly impacted by the ban during their retail shopping trips.

44% of South Australians who do a regular top-up shop for their groceries reported using a thicker plastic bag. Almost half (49%) of high-income households used a thicker plastic bag for grocery shopping and were also more likely than low-income households to report using the thicker plastic bags for any purpose (83%).

Over half (57%) of the under 40s cohort reported using the thicker plastic bags for their grocery shopping, compared to a third (33%) of those aged over 40. This indicates that bag usage habits for the under 40s are more likely to be impacted by the ban than those in older age groups. Around seven in ten (67%) under 40s indicated they use paper bags for their grocery shopping. This finding demonstrates that under 40s are more reliant on bags available at the checkout compared to the over 40s cohort. Any future communications may need to consider targeting the under 40s to ease them into the transition of using alternative bag types.

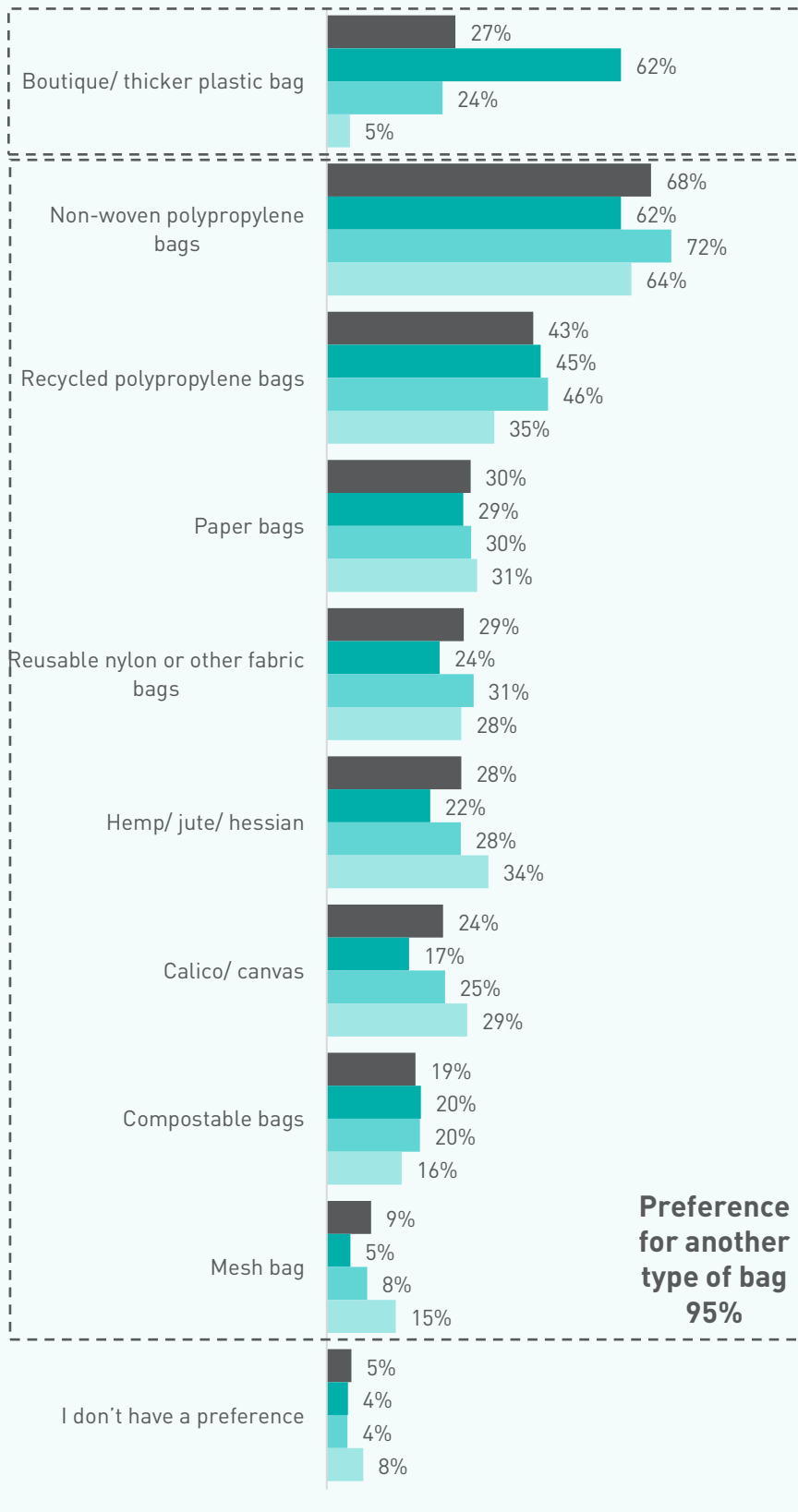
Use of thicker plastic bags by segments



# Bag type preference

Total bag type preference by segments

■ Total ■ Regular users ■ Occasional users ■ Non-users



Only three in ten (27%) prefer the thicker plastic bags, higher among regular users (62%).

Overall, 95% of South Australians preferred another type of bag to do their grocery or retail shopping with.

Over three in five (62%) regular users indicated they have a preference for the non-woven polypropylene bags to put their shopping items in. This demonstrates that although regular users may have more of a preference for the thicker plastic bags compared to the occasional or non-user segments, they also like using other types of alternative bags.

Two in five (39%) under 40s indicated a preference for the thicker plastic bags, while over 40s preferred the reusable nylon/ other fabric bags (32%) or the compostable bags (21%).

**Preference for another type of bag 95%**

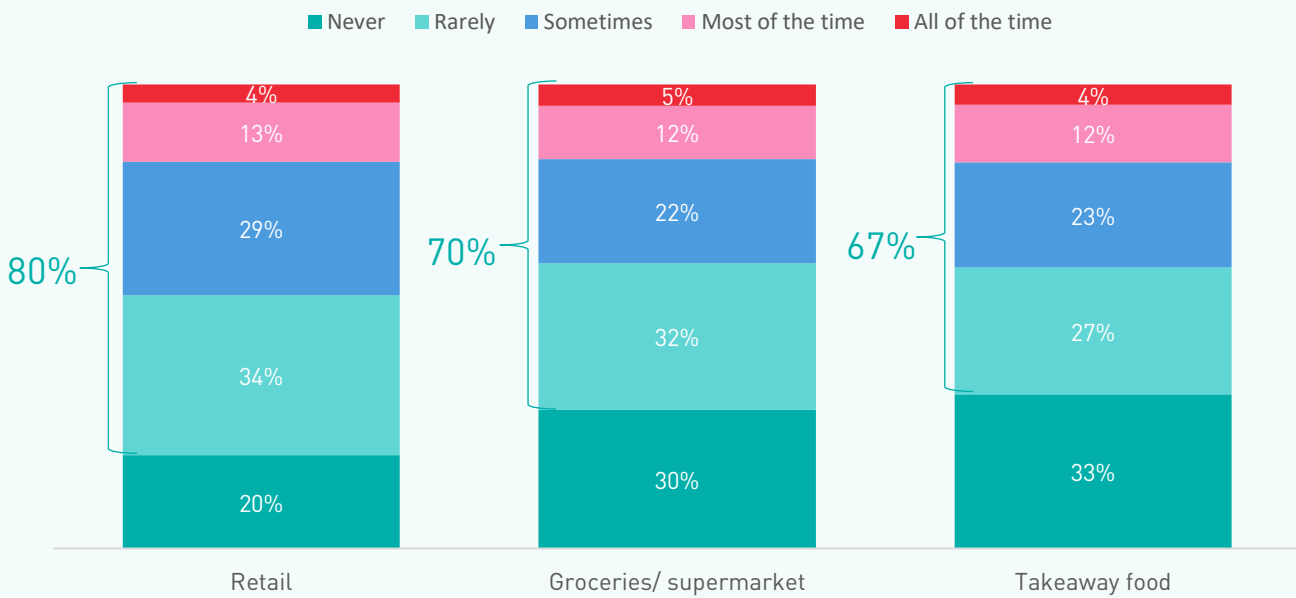
# Bag purchasing habits

Purchase/ acceptance of thicker plastic bags was higher for retail shopping (80%) compared to seven in ten (70%) who reported purchasing/ accepting them for their grocery shopping.

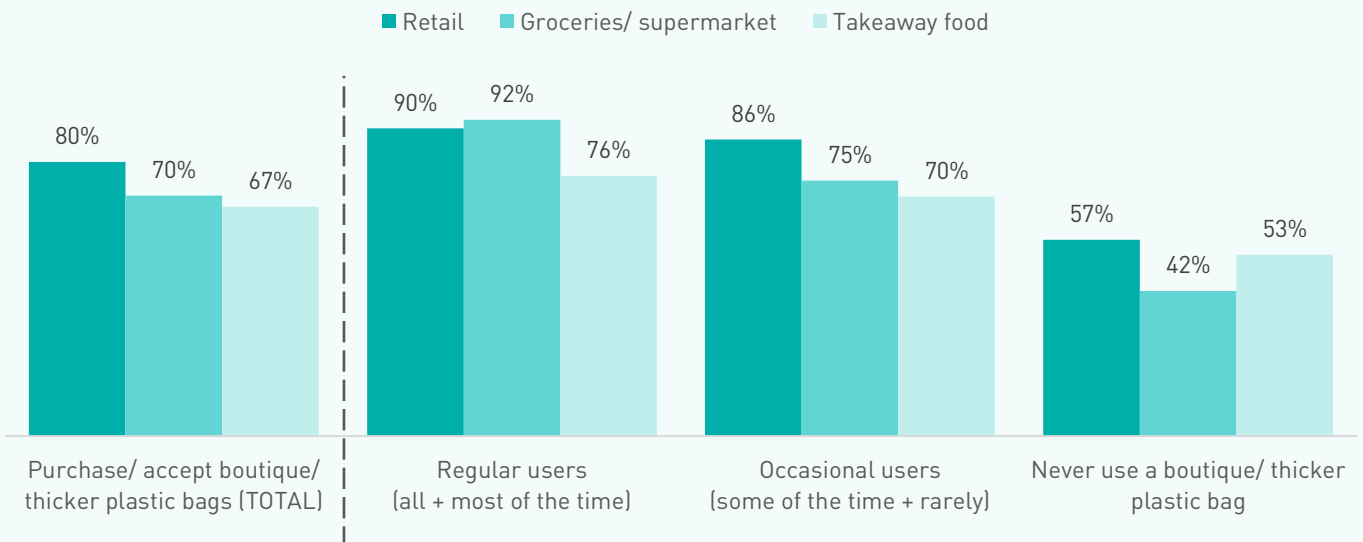
Around nine in ten regular users reported buying a thicker plastic bag when grocery shopping (92%) or retail shopping (90%). Occasional users had a higher incidence of accepting thicker plastic bags at retail outlets (86%) compared to purchasing/ accepting them when grocery (75%) or takeaway food shopping (70%).

72% of those who indicated doing a regular top up shop for their groceries also reported buying thicker plastic bags while grocery shopping.

## Purchase/accept new thicker plastic bags



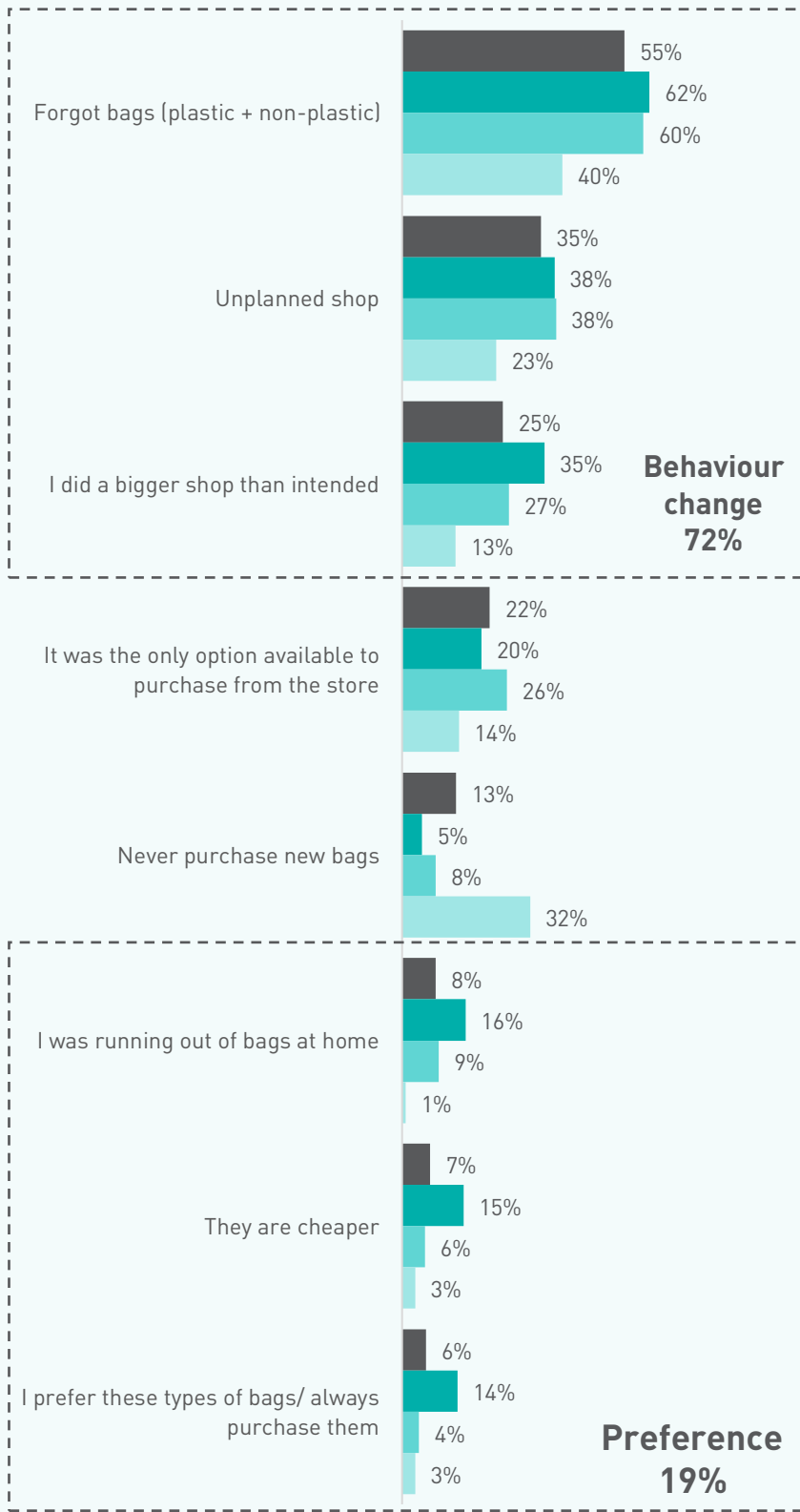
## Purchase/ accept thicker plastic bags by segments



# Reasons for purchasing/ accepting a new bag

## Reasons for purchasing/ accepting new thicker plastic bags

■ Total ■ Regular users ■ Occasional users ■ Non-users



Disorganised shopping behaviour was the main reason for purchasing new thicker plastic bags while shopping.

Although regular users were more likely to purchase thicker plastic bags because they have a preference for them (36%), almost three in five (79%) indicated that they purchased these bags owing to their own disorganisation (i.e., forgetting bags from home or from the car).

Occasional users also similarly indicated that their own behaviour led them to purchasing/ or accepting a new thicker plastic bag while shopping (76%), followed by 56% of non-users.

Responses here indicate that although there may be a preference for these types of bags among some South Australians, the purchase/ acceptance of thicker plastic bags is primarily attributable to people's own disorganisation or lack of planning.

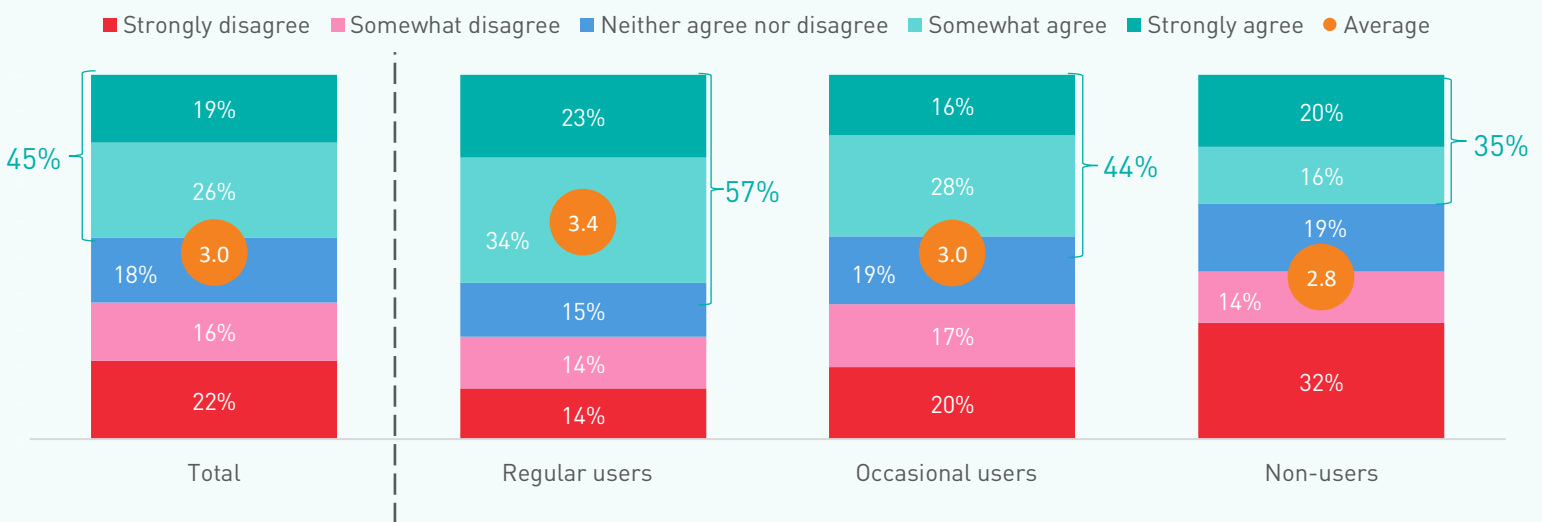
# Reasons for declining/ not purchasing a new bag

Over two in five (45%) indicated that the price of bags will influence their decision to purchase a new one while shopping.

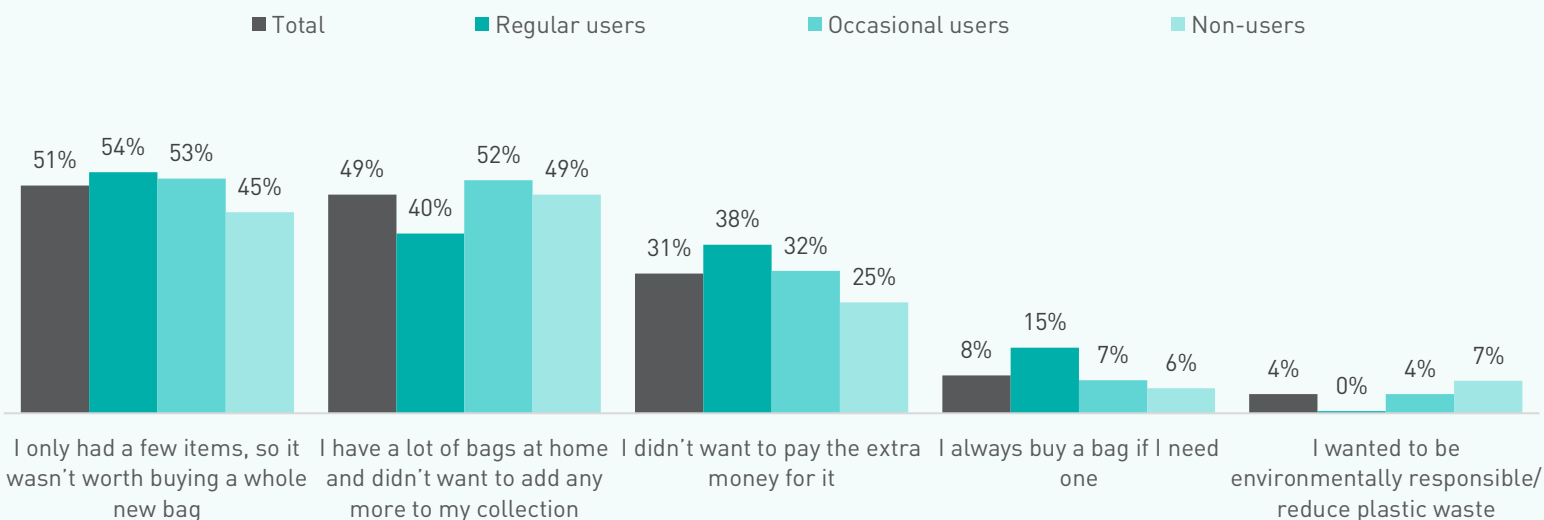
Regular users were more likely to indicate price sensitivity (57%) compared to the occasional or non-user segments.

Around half (52%) of the under 40s agreed that price impacts their bag choice, while just over two in five (42%) expressed that, during times when they declined to purchase a new bag, their main reason for doing so was because they were reluctant to pay extra for it.

## Agreement with whether or not price influences decision to purchase a new bag while shopping



## Main reasons for declining/ not wanting to buy a new bag while shopping by segments





# Re-use of thicker plastic bags

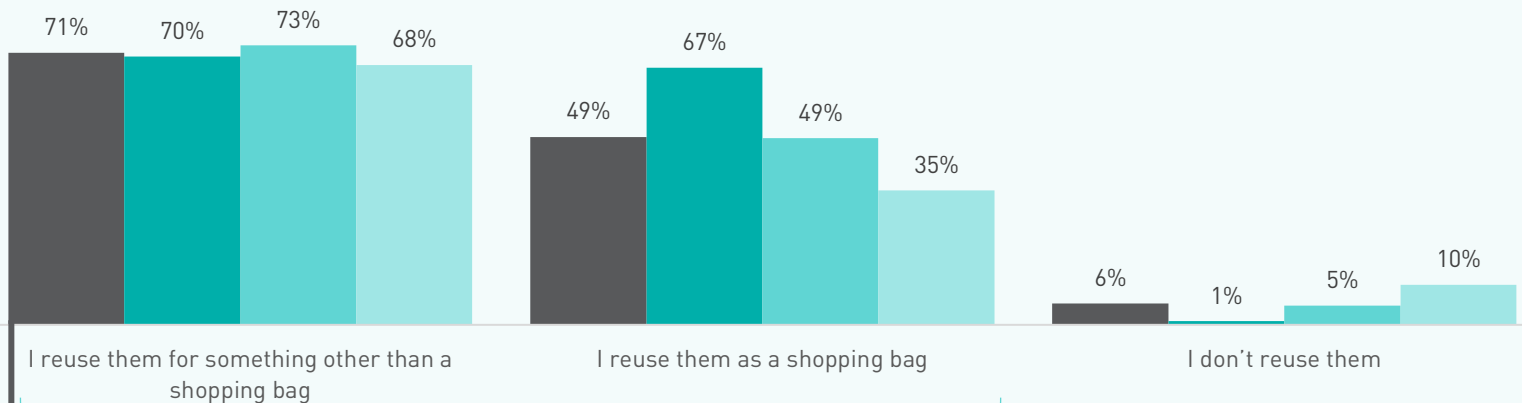
Almost seven in ten (67%) regular users reported that they reuse the thicker plastic bags as a shopping bag.

Overall, 94% of South Australians reuse the thicker plastic bags for shopping or another purpose, with only a minority reporting that they do not reuse them.

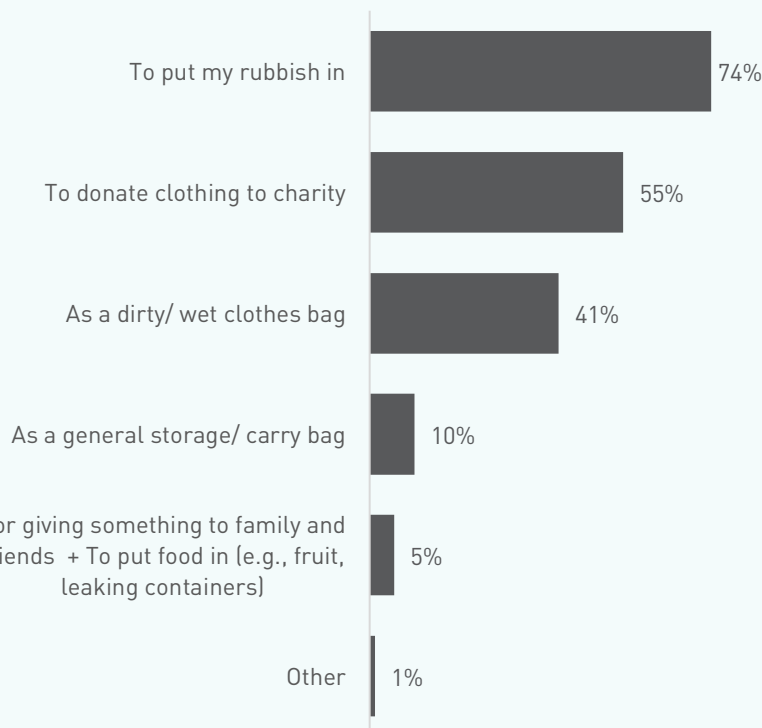
Over half (55%) of the under 40s reuse the thicker plastic bags as a shopping bag, while over seven in ten (74%) of the over 40s indicated reusing the bags for another purpose.

## Re-use of thicker plastic bags

■ Total ■ Regular users ■ Occasional users ■ Non-users



## What other purpose thicker plastic bags serve



**94%**  
Reuse

Of those who indicated reusing the thicker plastic bags for a purpose other than shopping, over seven in ten (74%) said that they use it to put their rubbish in.

Almost three in five (56%) regular users indicated that they re-purpose the bags as a dirty/ wet clothes bag.

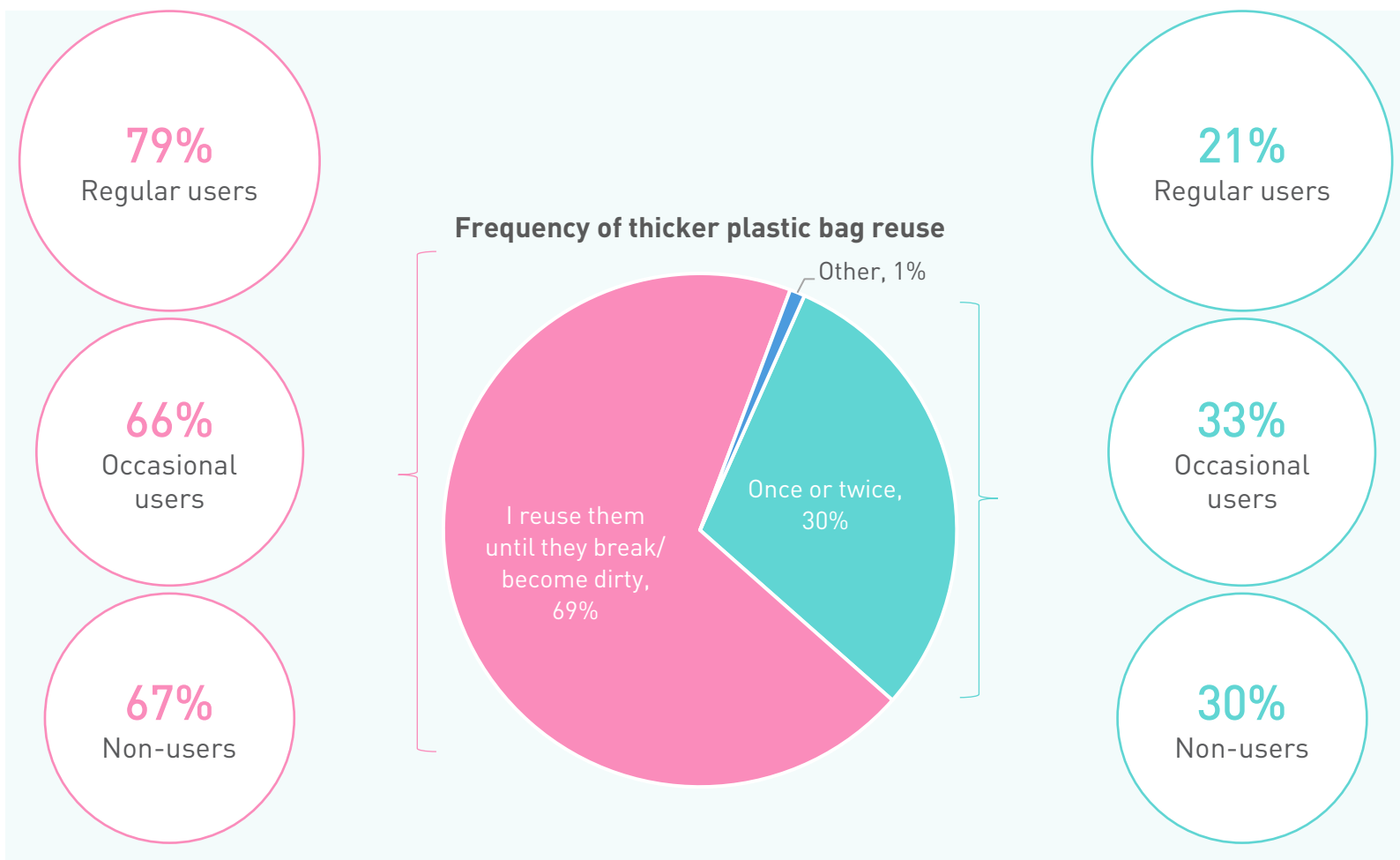
Under 40s had a higher incidence of putting their rubbish into the thicker plastic bags (86%), compared to the over 40s who were more likely to use it as a general storage/ carry bag (13%), or to put items/ food into to give to others (7%).

# Frequency of thicker plastic bag reuse

Seven in ten (69%) reported reusing the thicker plastic bags until they break or become dirty, while three in ten (30%) only use them once or twice before disposing of them.

Regular users had a higher incidence of reporting that they reuse the bags until they are not reusable anymore (79%), compared to a third (33%) of occasional users who reported only using them once or twice before disposing of them.

Under 40s were slightly more likely to only reuse the bags once or twice (33%), while over 40s had a slightly higher incidence of reusing them until they could no longer be reused (71%).



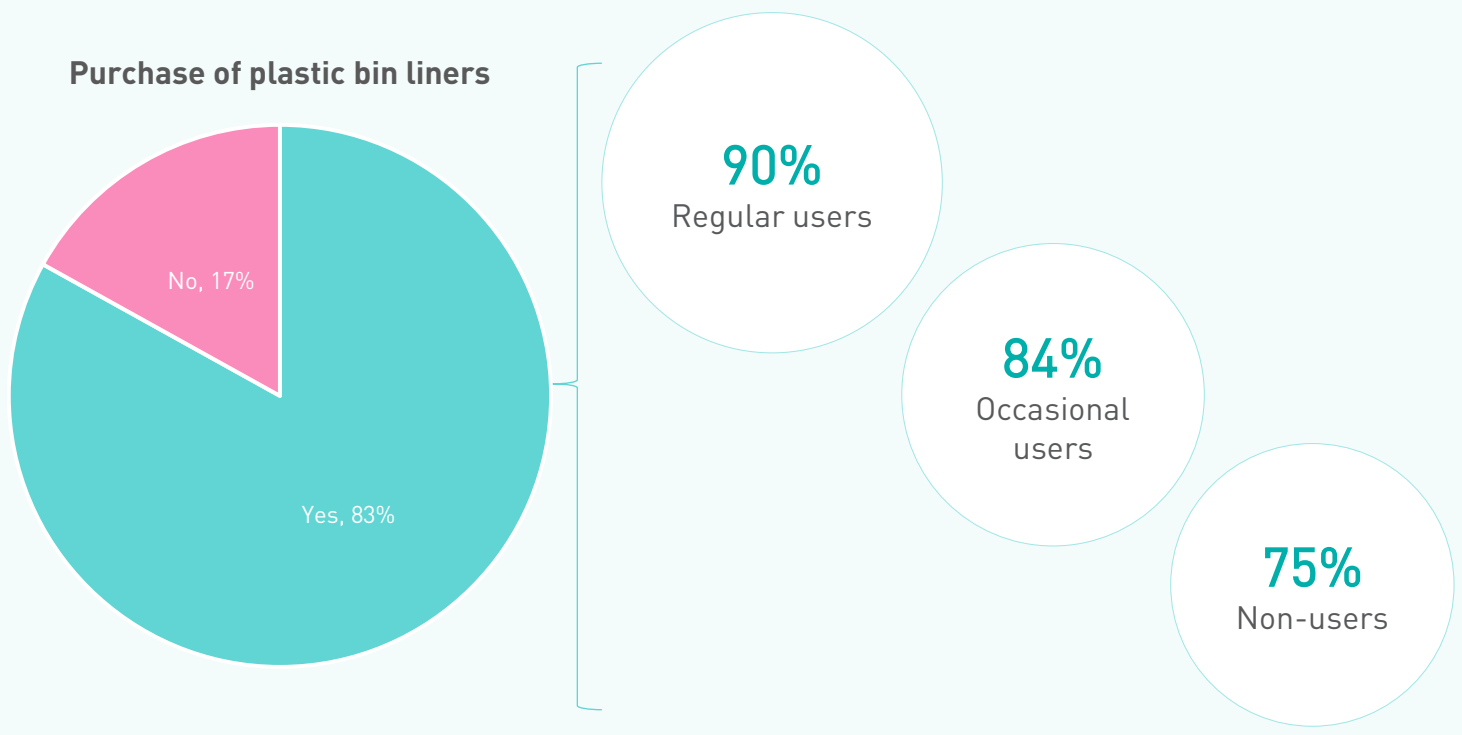
# Plastic bin liner purchasing habits

Plastic bin liners are used by over three in five (83%) South Australians.

Regular users of the thicker plastic bags had the highest incidence of reporting purchases of plastic bin liners, compared to other user segments.

Regular users are more likely to be using the thicker plastic bags as bin liners, while non-users may be exercising greater environmental consciousness by avoiding plastic altogether. This is further unpacked in the qualitative research.

Under 40s were more likely to purchase plastic bin liners (89%) compared to the over 40s (80%)



# Attitudes toward the environment

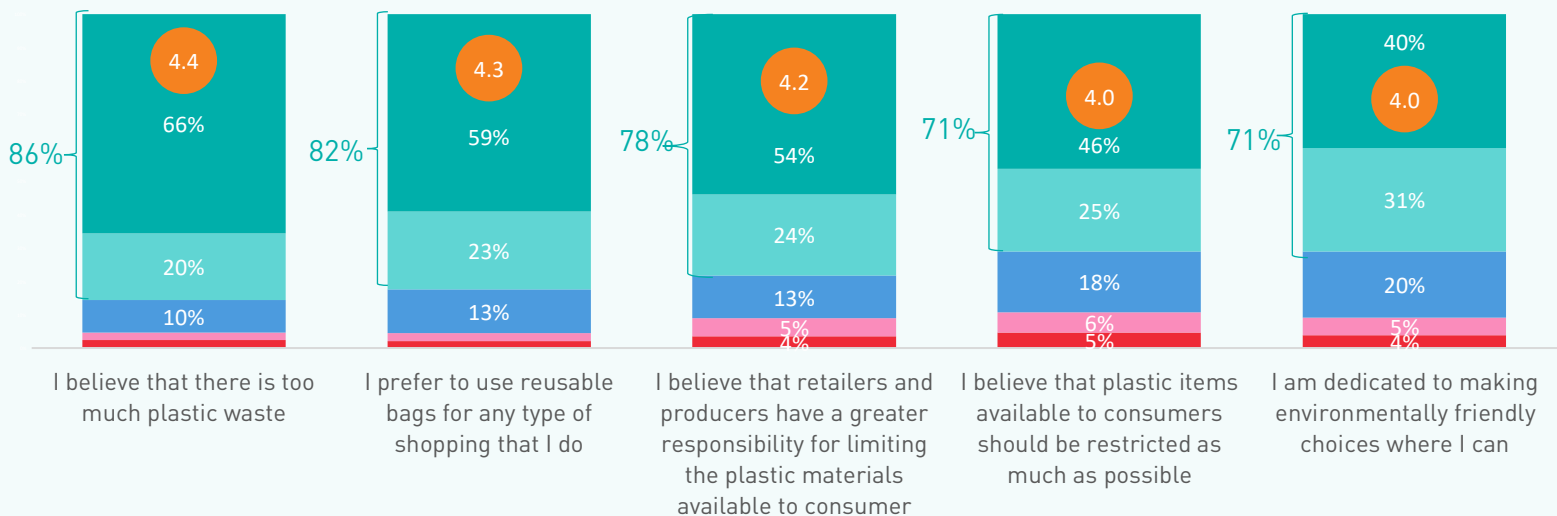
South Australians can be considered highly environmentally conscious as between 71% and 86% indicated agreement across all metrics. Non-users were more likely to agree across all statements. This indicates that there are some attitudinal barriers for some South Australians who fit into the occasional and regular user segments.

Under 40s, males, those opposed to the ban and regular users had a lower incidence of agreement across metrics.

There were slight differences between high and low-income earners attitudes toward the environment, with the latter being slightly less likely to agree that there is too much plastic waste (3pp lower agreement) and believing that the availability of plastic items should be restricted (2pp lower agreement).

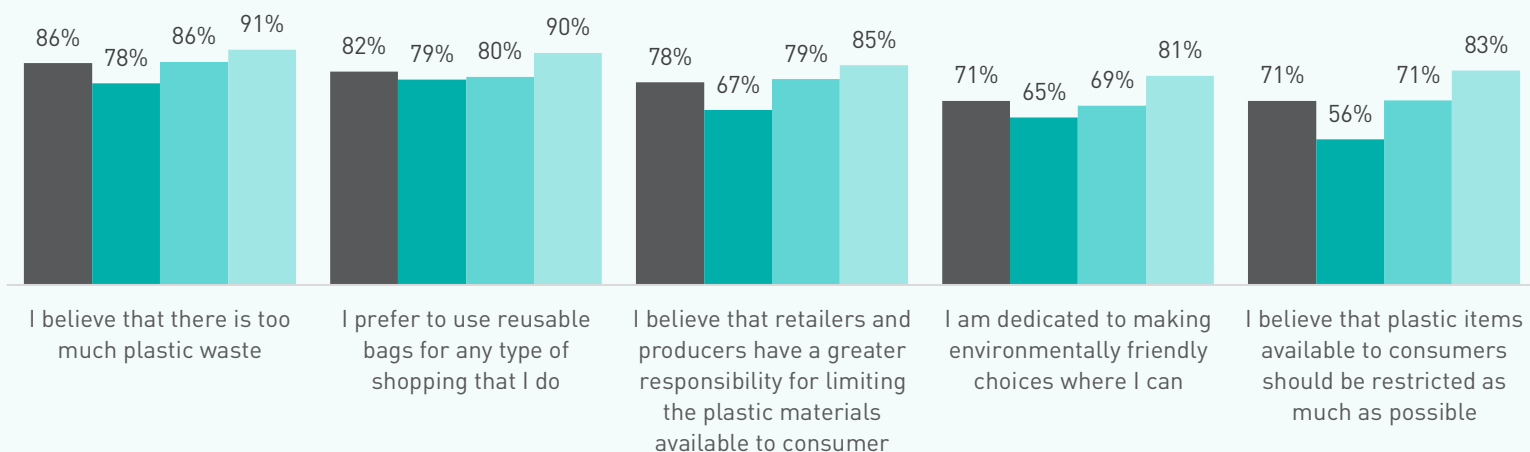
## Agreement with environmentally conscious statements

Legend: Strongly disagree (Red), Somewhat disagree (Pink), Neither agree nor disagree (Blue), Somewhat agree (Light Teal), Strongly agree (Dark Teal), Average (Orange circle)



## Total agreement with environmentally conscious statements by segments

Legend: Total (Dark Grey), Regular users (Dark Teal), Occasional users (Medium Teal), Non-users (Light Teal)



# Awareness of the ban

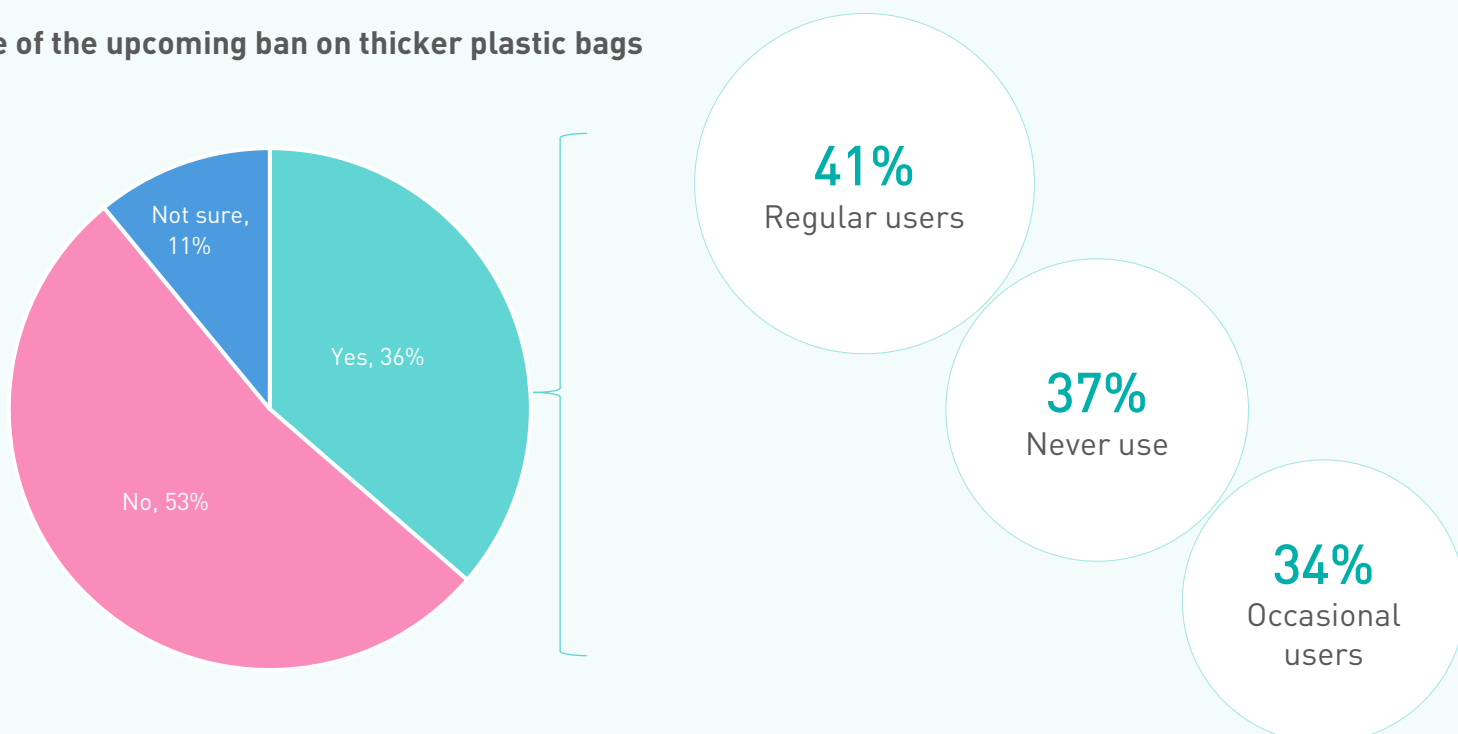
Over a third (36%) were aware of the upcoming ban of the thicker plastic bags.

Awareness was higher among regular users, who are the cohort most likely to be significantly affected by the ban.

Overall, awareness was low to moderate, with nearly two thirds (64%) indicating they had not heard of the ban or were unsure if they had previously been made aware of it. Low-income earners were slightly more likely to be aware of the upcoming ban (42%) compared to high income earners (30%).

Greater promotion and communication about the impending ban would serve to increase awareness across all cohorts and allow time for South Australians to adjust their behaviours, particularly for those in the regular user's cohort.

## Aware of the upcoming ban on thicker plastic bags



# Support for the ban

Overall, there was strong support for the ban on thicker plastic bags across South Australia, with over four in five (83%) not opposed to it.

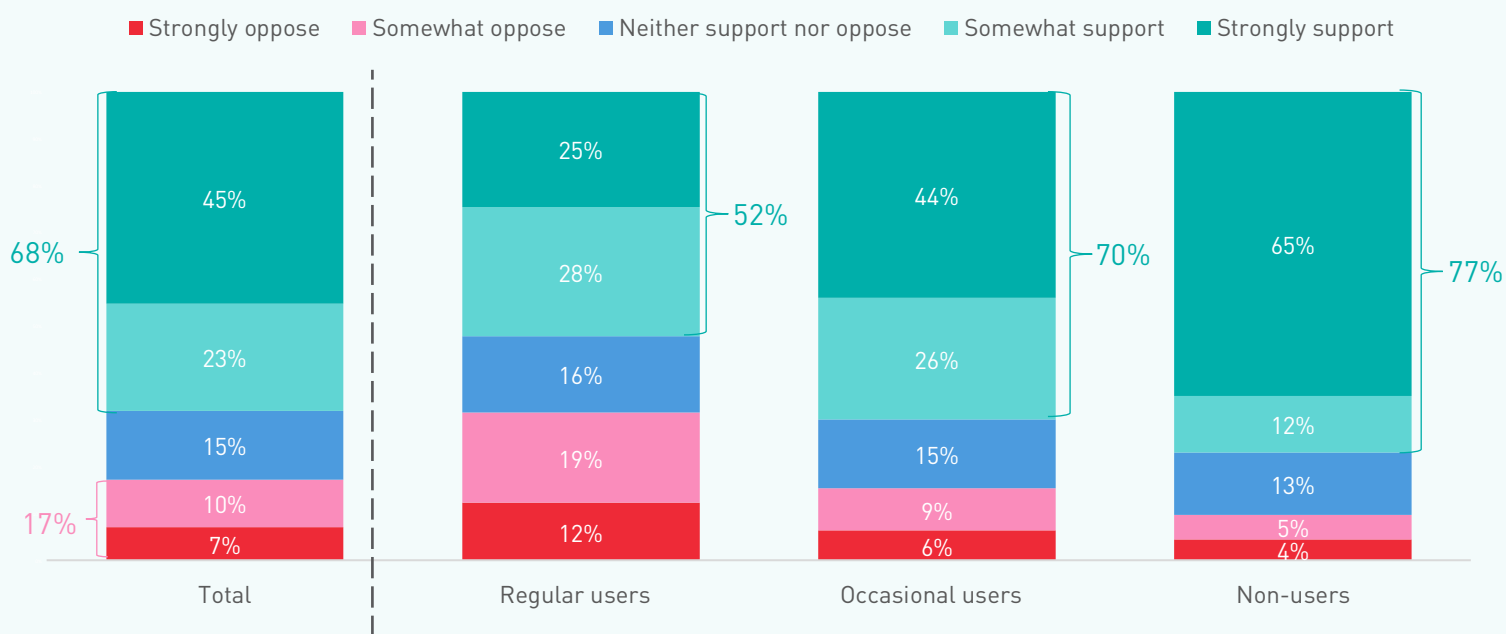
Seven in ten (68%) expressed their support for the ban overall, with regular users being softer in their support (52%).

Notably, around a quarter (23%) of the under 40s had a higher incidence of remaining neutral on the policy.

Low-income households were 9pp less likely to indicate support for the ban (63%) compared to 72% of high-income households.

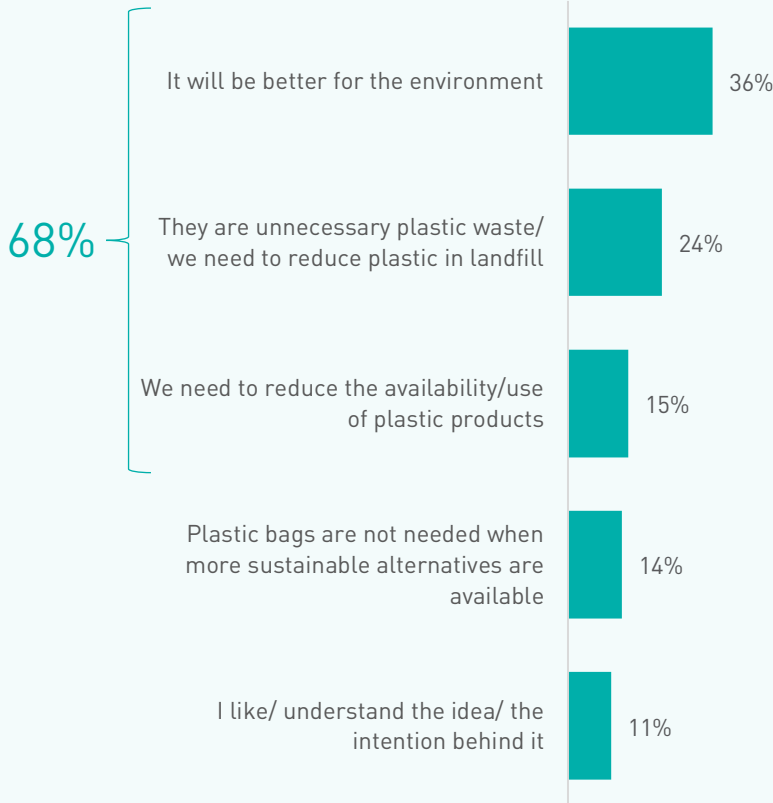
Awareness of the ban was positively correlated with support for the ban, with over seven in ten (73%) who were previously aware of it also indicating support for it. This is indicative that generating greater levels of public awareness for the ban may increase support for the policy change overall.

### Support for the ban by segments



# Reasons for support/ opposition of the ban

## Top 5 reasons for support



Almost seven in ten (68%) of those who support the ban on thicker plastic bags believe that it will be beneficial for the environment.

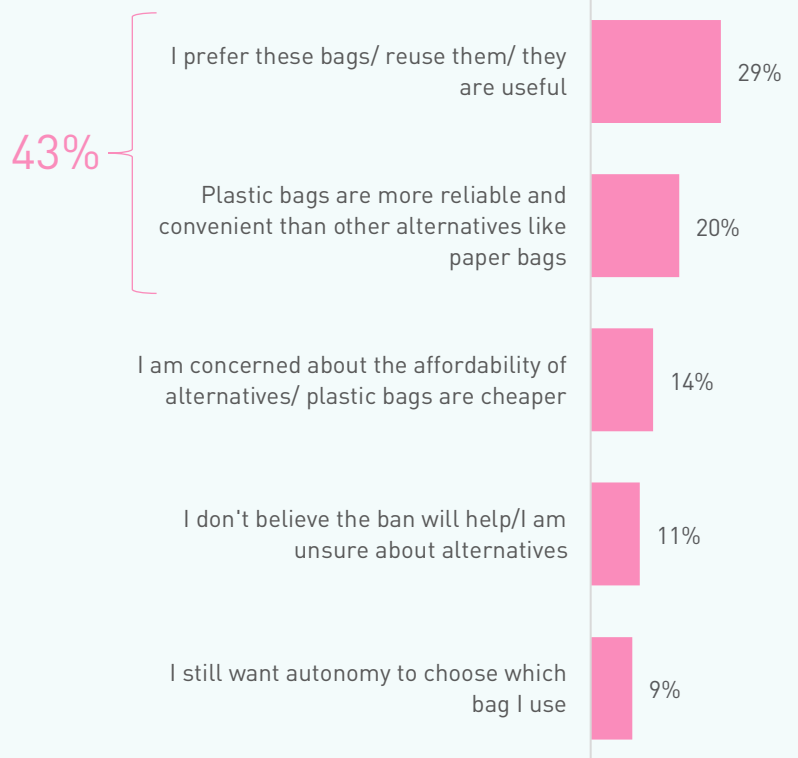
Over 40s were more likely to say that plastic bags were not necessary when alternatives are available (13%).

Almost two in five females (57%) and those aware of the ban (59%) indicated their support for the ban based on their environmental concerns, or the perceived environmental benefits the ban would have.

Over two in five (43%) of those who oppose the ban on thicker plastic bags expressed this position because they have a distinct preference for these types of bags.

Males had a higher incidence of not believing the ban would be effective or having concerns/ being unsure about alternatives (7%).

## Top 5 reasons for opposition

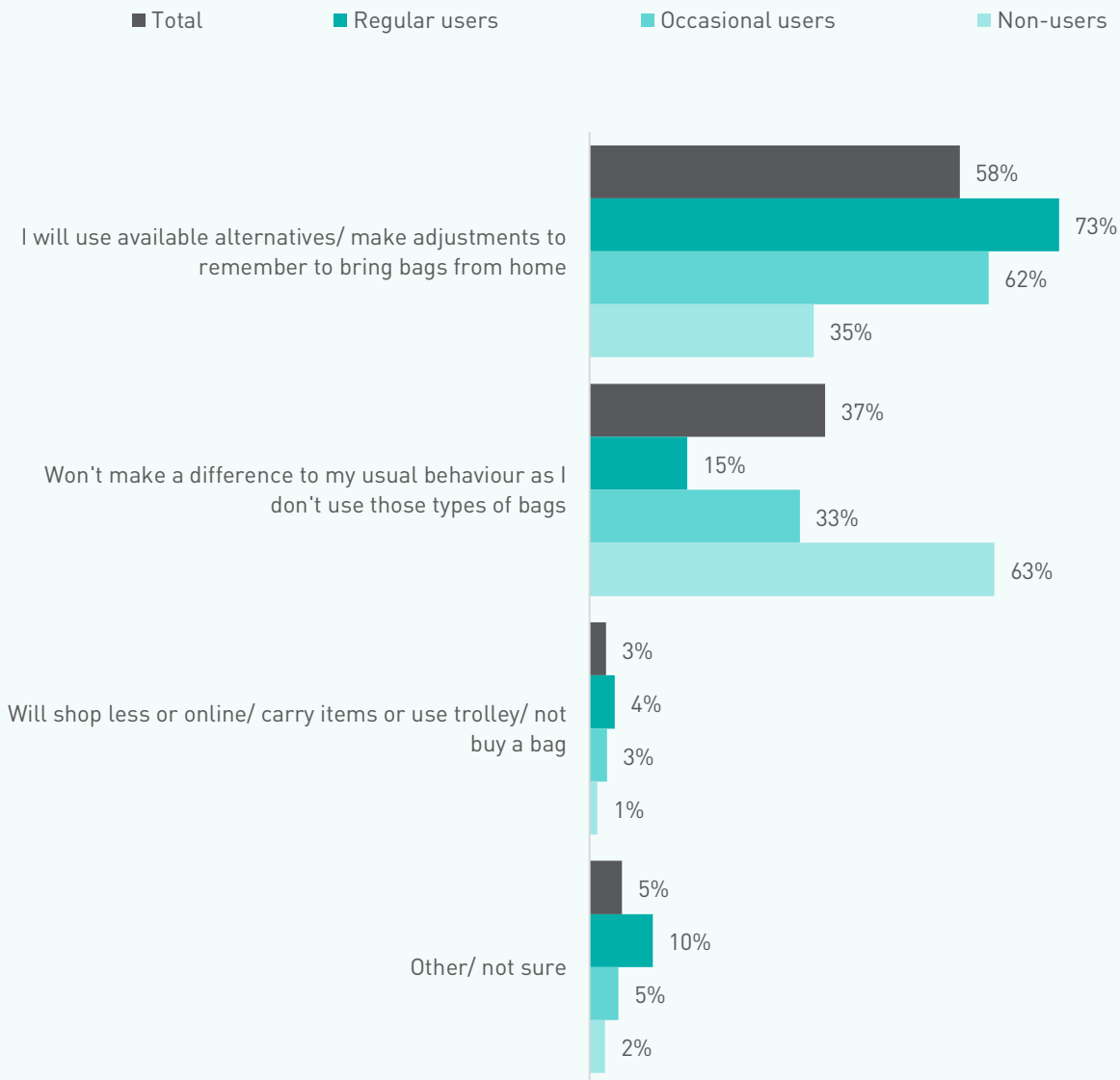


# Effect of the ban of bag behaviour and habits

Three in five (58%) plan to adjust their behaviour as a natural consequence of the ban once it is implemented.

Using available alternatives or adjusting avoid forgetting bags was higher among the regular user cohort, indicating that a high proportion of this segment will find ways to adapt their behaviour or find alternative solutions.

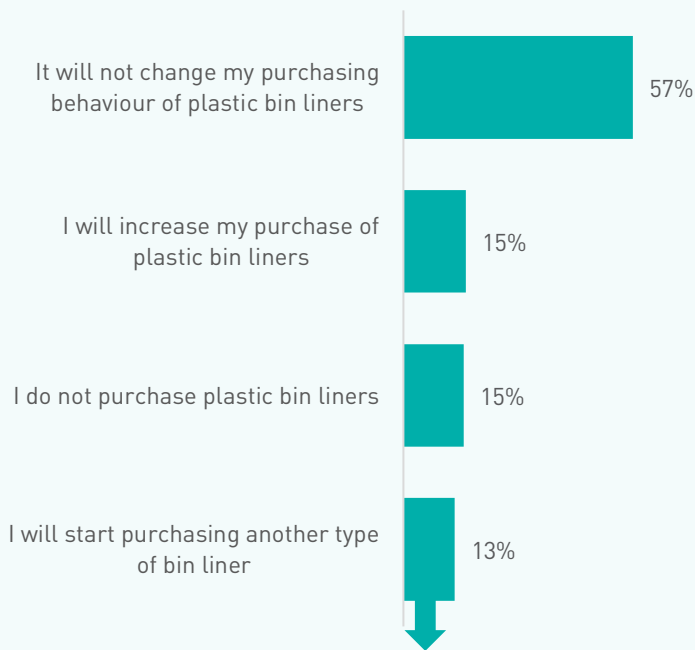
## Impact of ban on shopping behaviour





# Impact of ban in bin liner purchases

## How the ban will impact bin liner purchases



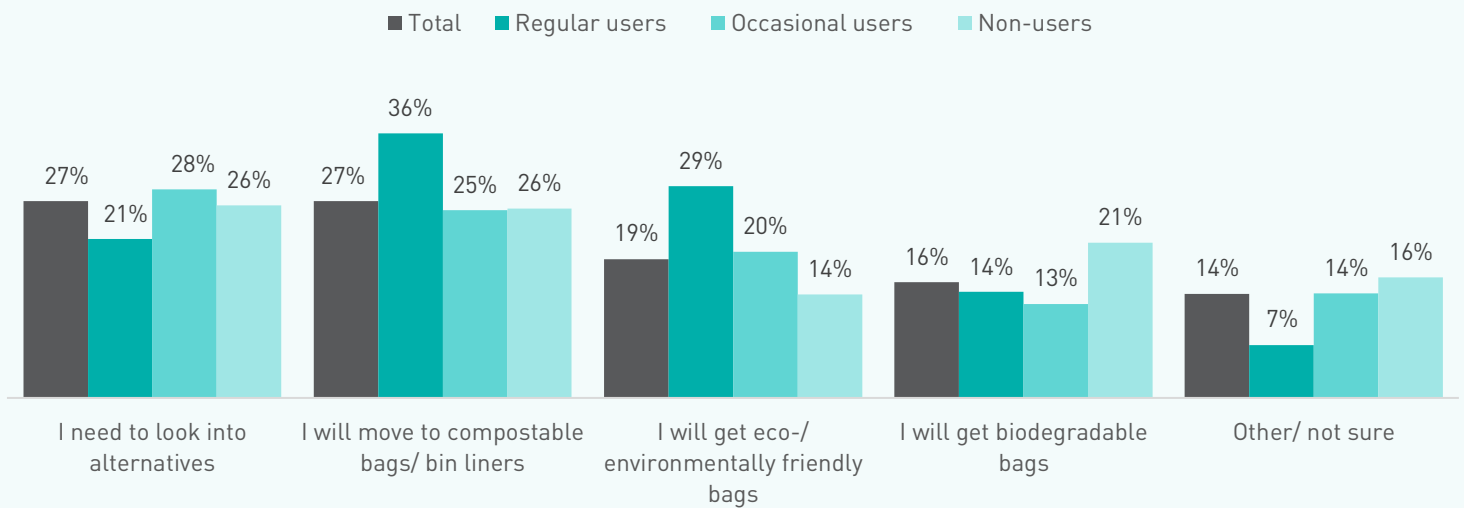
Almost three in five (57%) would not change their purchasing of plastic bin liners.

Almost three in ten (27%) regular users reported that they would increase their purchasing of plastic bin liners once the ban is implemented to replace their current use of the thicker plastic bags as bin liners. Around two in five (21%) under 40s echoed this statement.

17% of non-users said they would start buying another type of bin liner, while around a quarter (24%) said that they already do not purchase plastic bin liners.

**74%**  
Use a thicker plastic bag to put their rubbish in

## Alternative types of bin liners



Over a quarter (both 27%) of those who indicated that they would purchase another type of bin liner expressed needing to look for/ investigate alternatives or moving to compostable bags/ bin liners for their rubbish.



# Metro vs regional

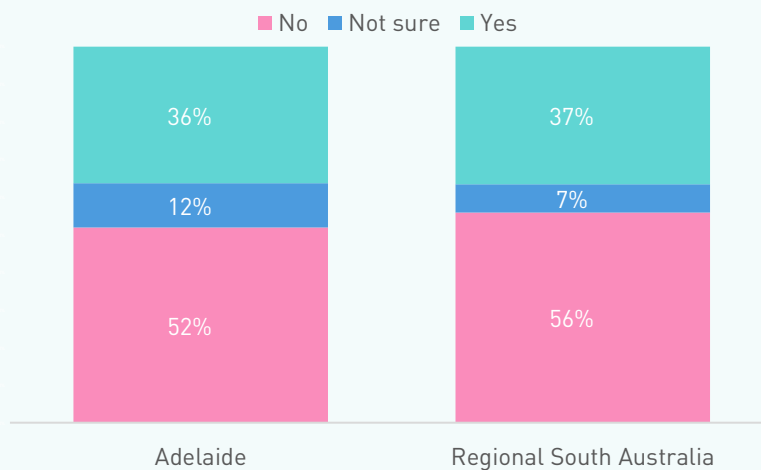
# Awareness and support

Similar levels of ban awareness across Adelaide and regional South Australia.

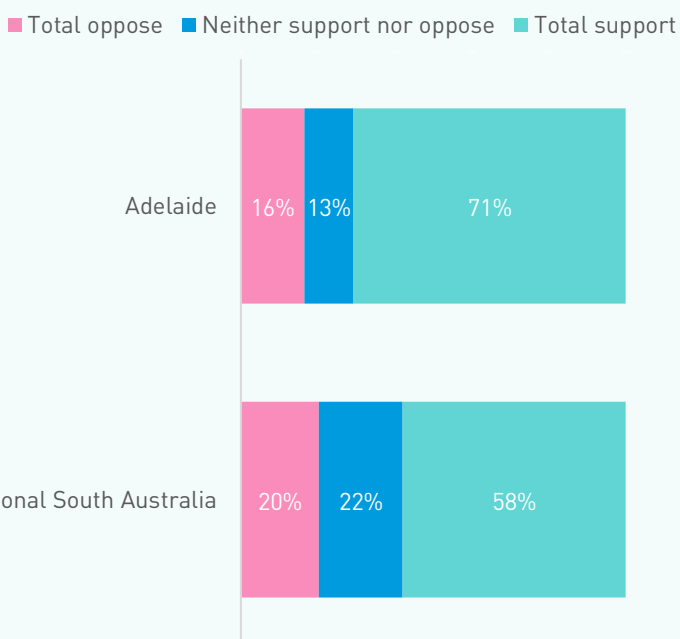
Those in Adelaide were 13pp more likely to support the ban than those in regional South Australia. However, levels of opposition were relatively similar, while those in regional South Australia were 9pp more likely than those in Adelaide to indicate a position of neutrality.

Regional South Australians had a higher incidence of indicating that the ban will not make difference to their usual behaviours as they already do not use the thicker plastic bags (45%).

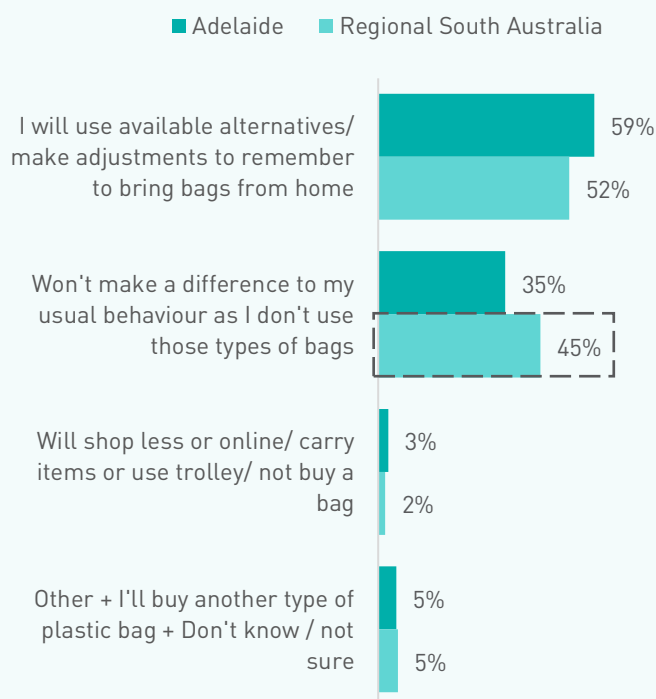
**Awareness of ban by location**



**Support for ban by location**



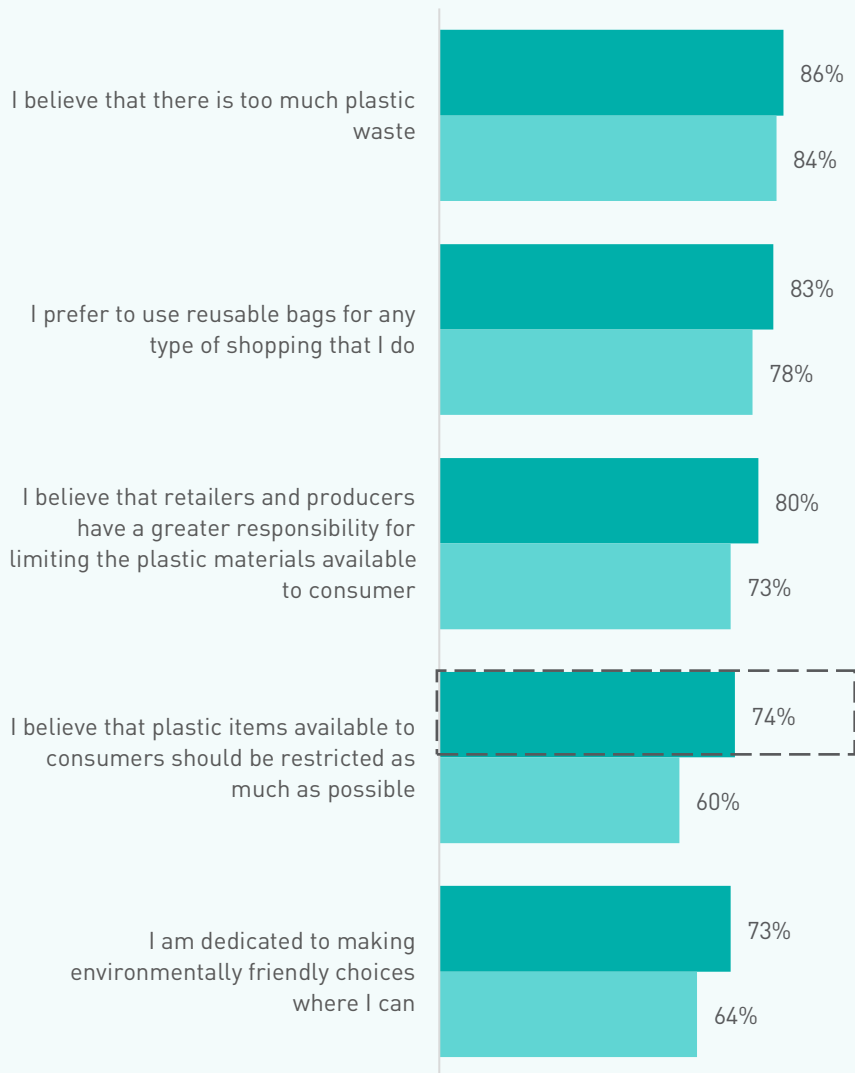
**Impacts of the ban on bag usage by location**



# Attitudes

## Total agreement with attitudinal statements by location

■ Adelaide ■ Regional South Australia

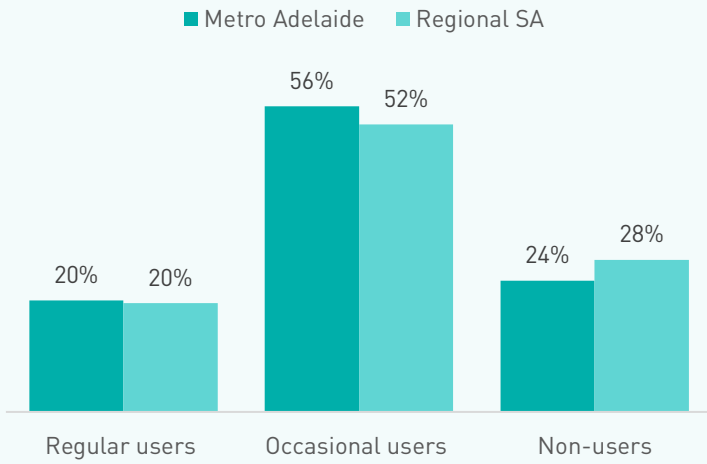


Similar levels of agreement across those residing in Adelaide and regional South Australia, with Adelaide residents slightly more likely to indicate agreement across statements indicating environmental consciousness.

This was particularly the case when asked if they believe the availability of plastics should be restricted, with regional South Australians 14pp less likely to agree than those in Adelaide.

# Usage

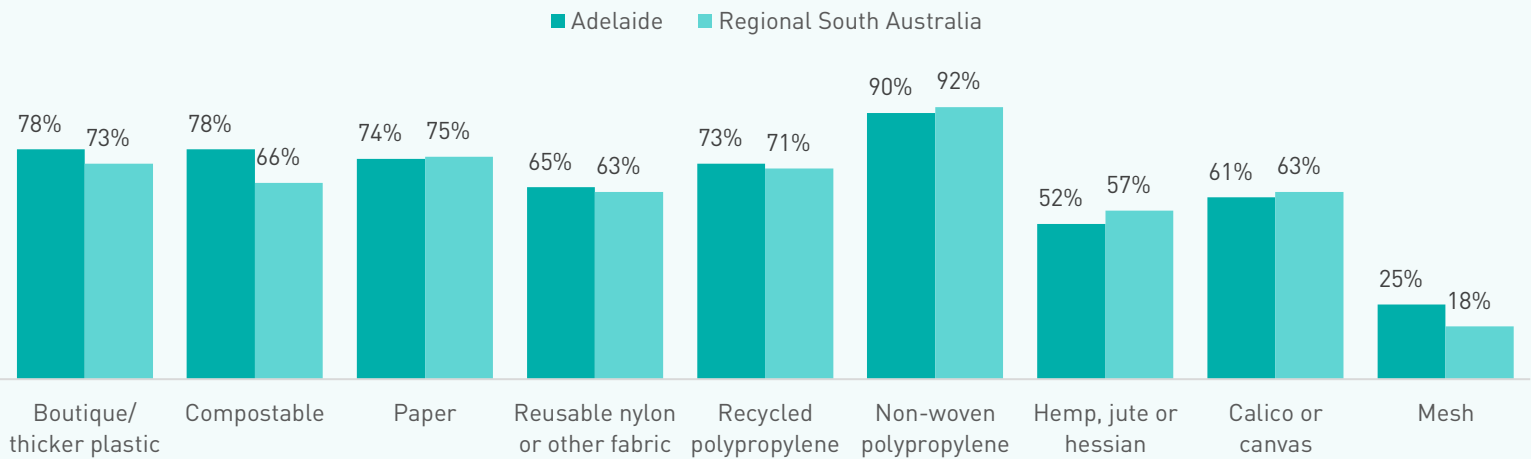
## Segments by location



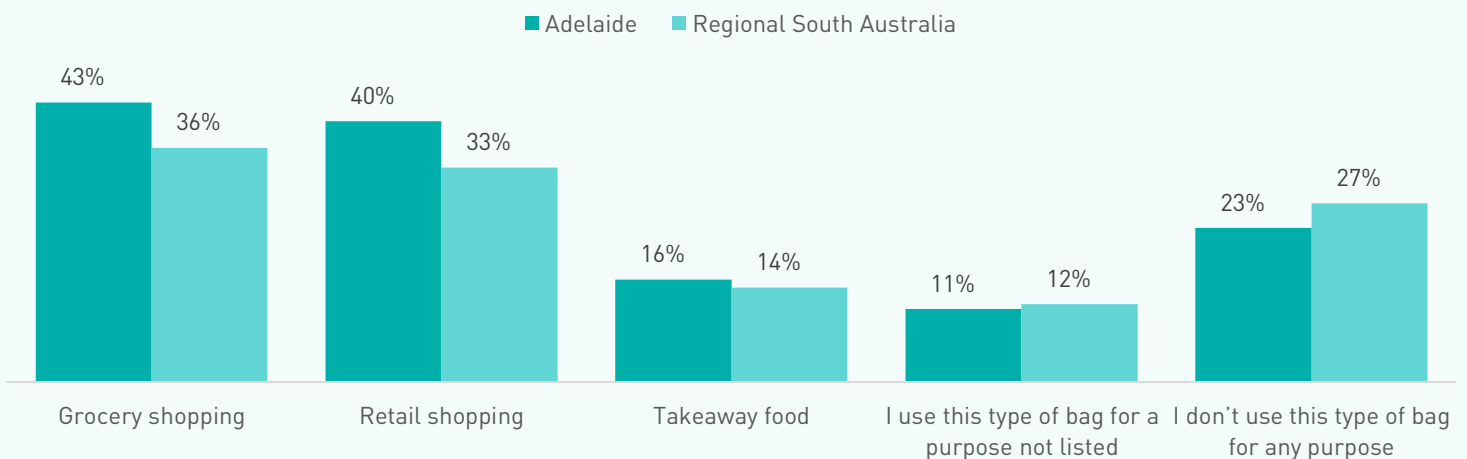
There was a slight, but insignificant, difference between Adelaide and regional South Australians bag use, with occasional users 4pp more likely to reside in Adelaide, and Regional South Australians 4pp more likely to be non-users.

Similar usage of various types of bags across Adelaide and regional South Australia, with non-woven polypropylene being the most used for any shopping, with regional South Australians slightly less likely to use the thicker plastic bags overall.

## Bag use by location



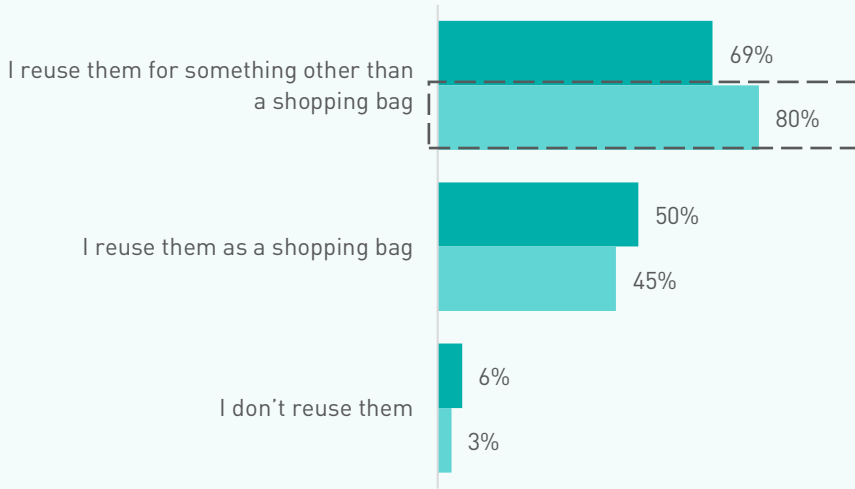
## Use of thicker plastic bags for different types of shopping by location



# Reuse

## Reuse of thicker plastic bags by location

■ Adelaide ■ Regional South Australia

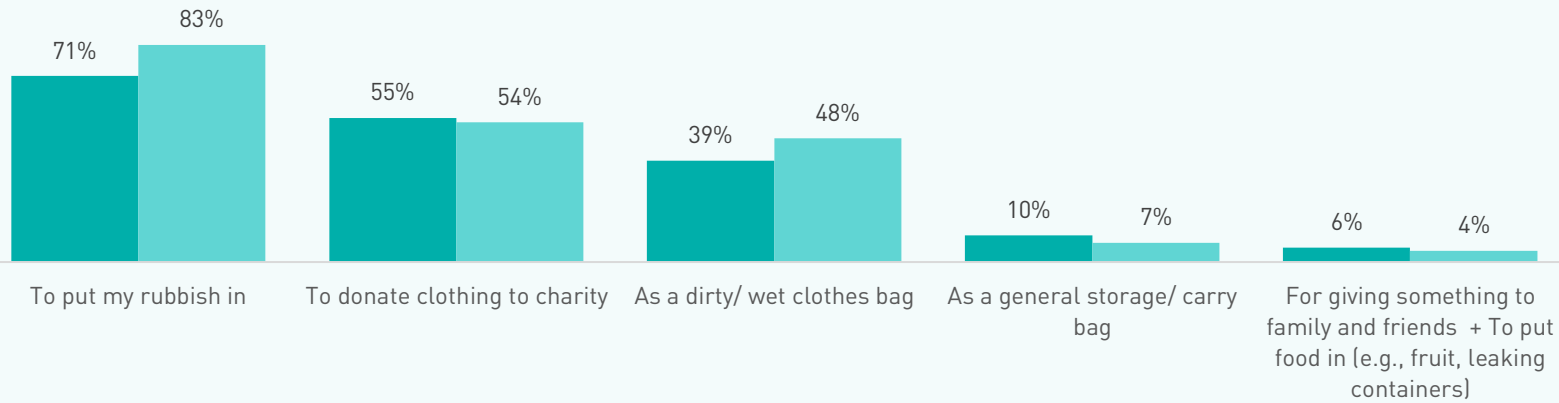


Regional South Australians had a higher likelihood of reporting that they use the thicker plastic bags for a purpose other than their shopping, while around half of those from Adelaide reused them for their subsequent shopping trips.

Regional South Australians were 12pp more likely to indicate using the thicker plastic bags to put their rubbish in and 9pp more likely to indicate using them as a dirty/ wet clothes bag compared to Adelaide residents.

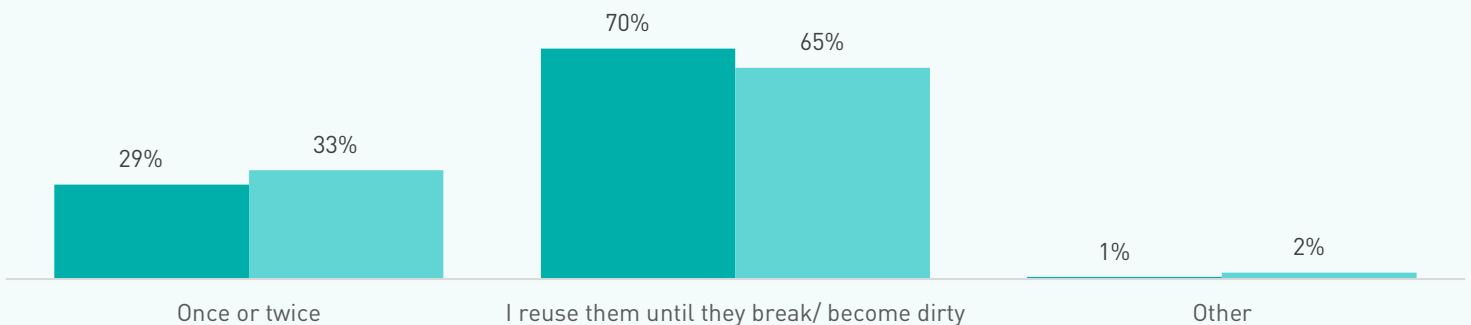
## Purpose for thicker plastic bags other than shopping by location

■ Adelaide ■ Regional South Australia



## Frequency of thicker plastic bag reuse

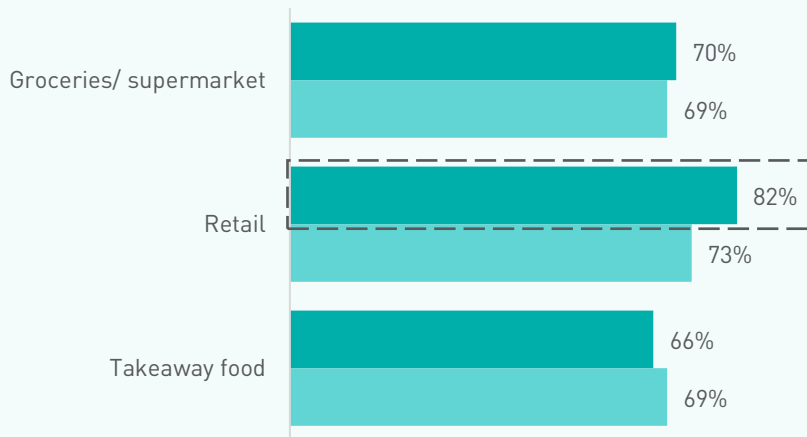
■ Adelaide ■ Regional South Australia



# Purchasing/ acceptance

## Purchase/accepting new thicker plastic bags by location

■ Adelaide ■ Regional South Australia

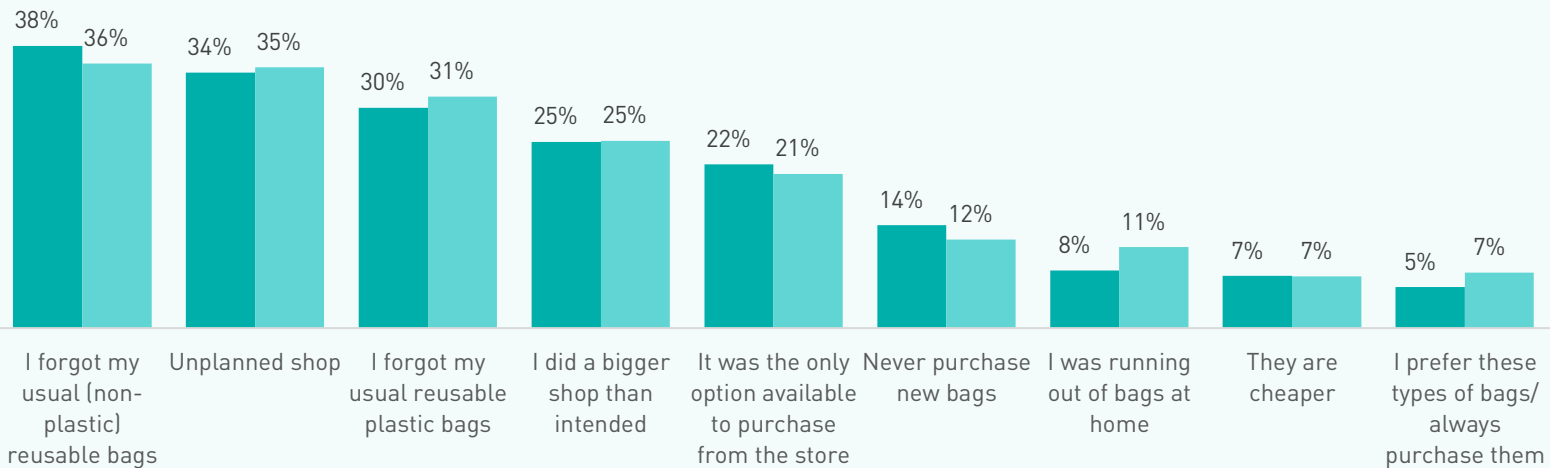


Adelaide residents were 9pp more likely than regional South Australians to purchase/ accept a new thicker plastic bag when retail shopping.

Reasons for purchasing a new bag were relatively similar across location type. However, reasons for declining showed some variations, with regional South Australians 9pp less likely to indicate price as a reason.

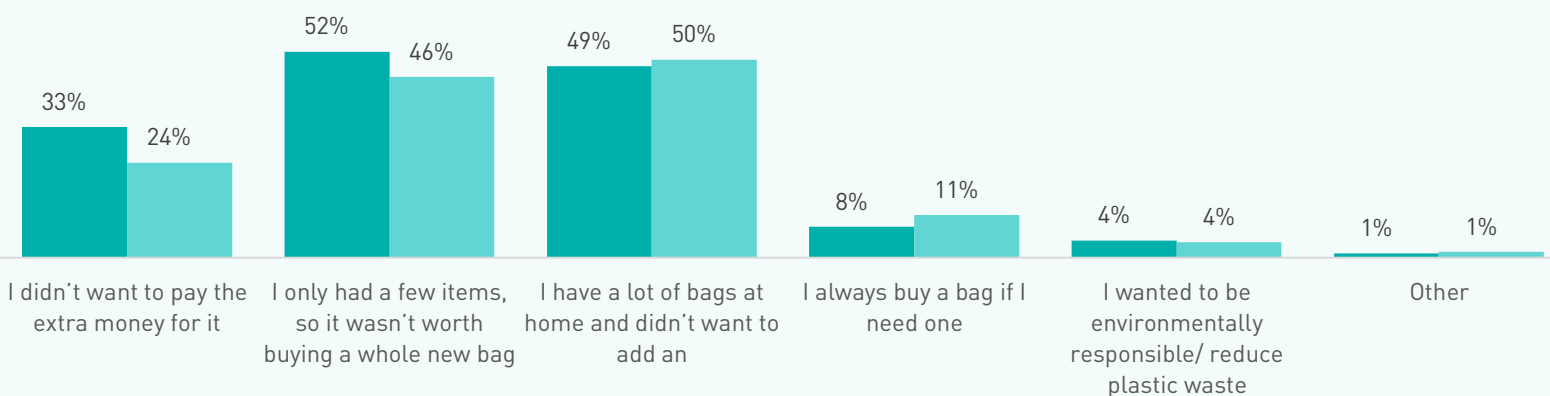
## Reasons for purchasing a new thicker plastic bag by location

■ Adelaide



## Reasons for declining/ not purchasing a new bag while shopping by location

■ Adelaide ■ Regional South Australia



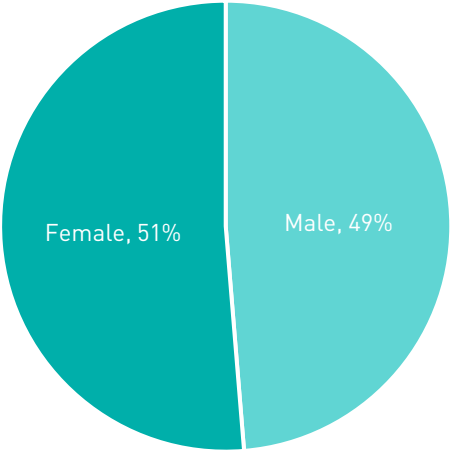


# Respondent profile

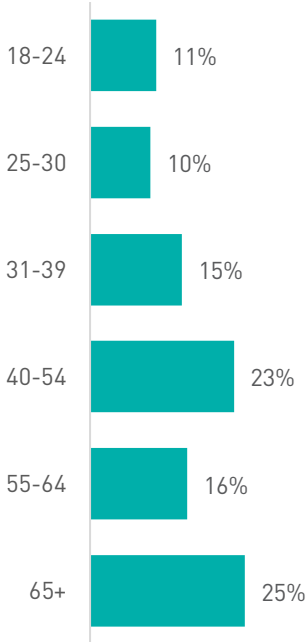


# Respondent Profile

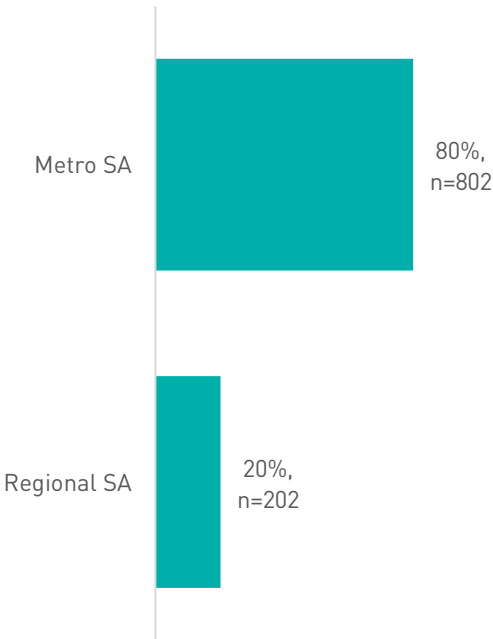
**Gender**



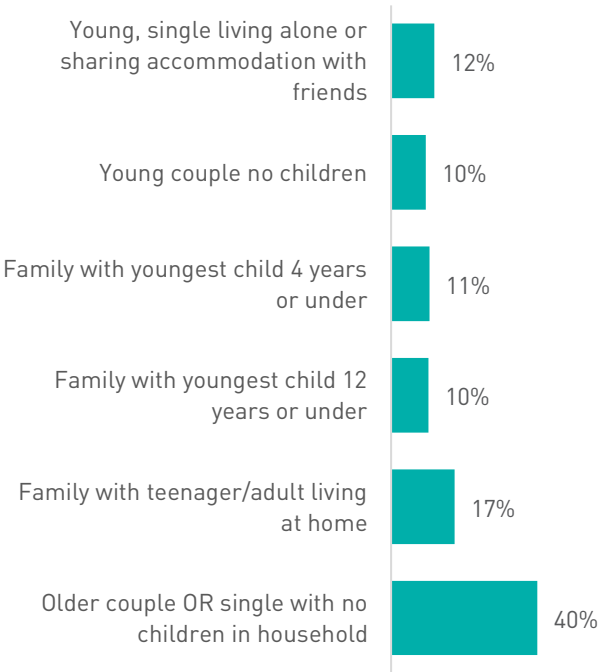
**Age groups**



**Location**

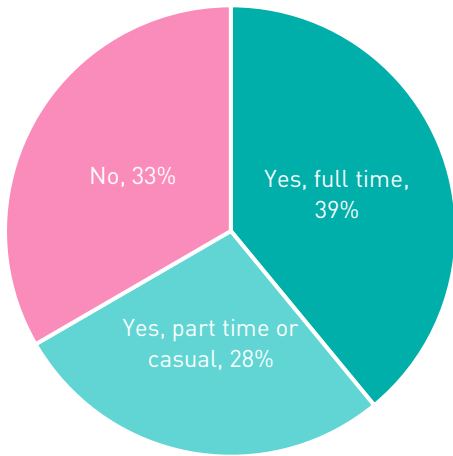


**Household structure**

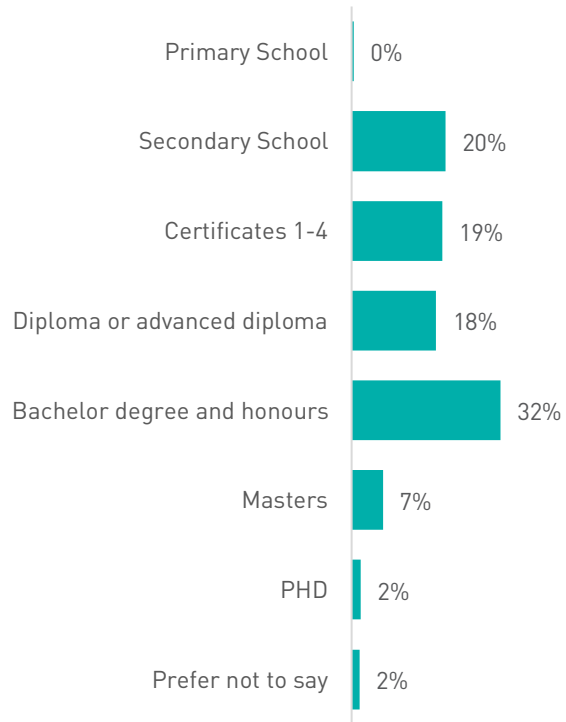


# Respondent Profile

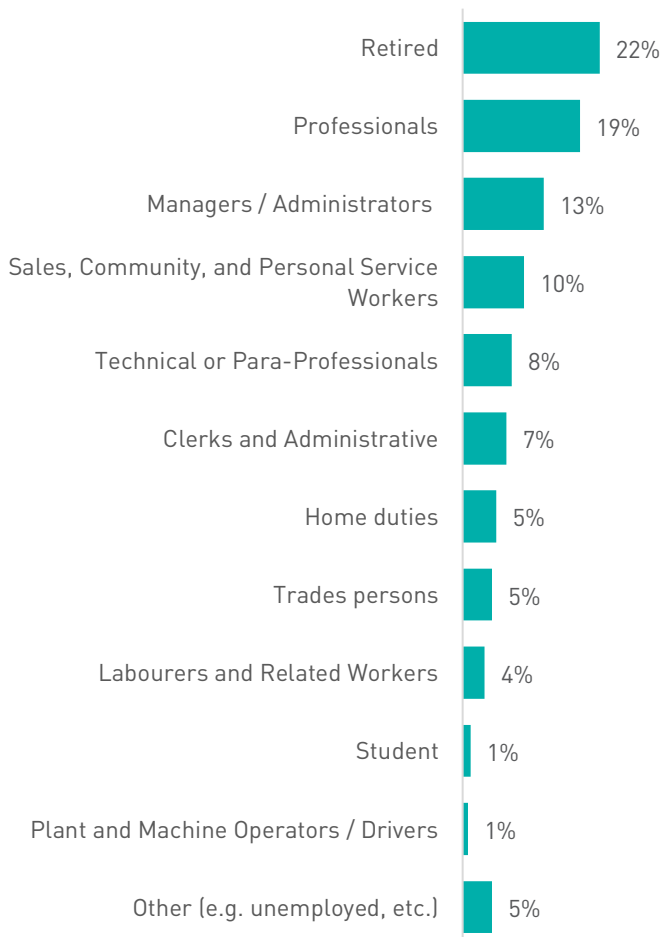
**Employment status**



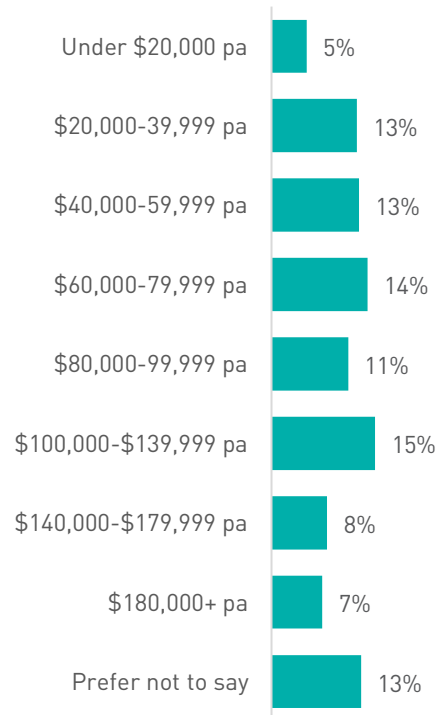
**Education level**



**Occupation**



**Household income**





# Qualitative Research

# Attitudes

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**Regular users** were aware of environmental impacts from plastic waste, although felt the responsibility should be more on producers than consumers. They acknowledged the presence of plastic in landfills and oceans and its slow degradation, yet they found plastic bags more convenient for their shopping needs. Reusing plastic bags was considered valuable to them, outweighing the appeal of 'environmentally friendly' alternatives. Regular users emphasised that the responsibility to reduce plastic waste should be placed on producers rather than solely on consumers. They expressed frustration with the recycling system in Australia and suggested the provision of detailed information on products made from recycled materials to promote increased recycling behaviour.

**Occasional users** demonstrated varying levels of environmental consciousness but did recognise the general concerns surrounding plastic waste. While not prioritising environmental impact in their shopping bag choices, occasional users' expressed awareness of the negative consequences of plastic waste on waterways and the well-being of animals. Some of them lacked knowledge about the specific time it takes for plastic bags to break down.

**Non-users** exhibited a strong commitment to environmental friendliness in their choice of shopping bags. They expressed frustration with excessive plastic packaging and actively sought out eco-friendly alternatives. Some felt so passionately about their reduction of plastic use that they expressed that when they do accumulate plastic bags, they felt like they failed, "hated themselves", or "felt sick."

In summary, the three user segments differ in their attitudes toward plastic bag usage. Regular users prioritise practicality and reuse, occasional users have varying levels of environmental consciousness, and non-users strongly emphasise environmental friendliness. While all user segments demonstrate some level of awareness of the environmental impacts of plastic waste, there are differences in their knowledge and concerns regarding recycling systems and cost considerations.



# Perceptions toward different bag types

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Regular users prioritise bag materials that offer sturdiness and durability and often preferred them over alternatives. This segment generally had a preference for the thicker plastic bags overall, expressing dissatisfaction with other alternative bags, finding them less reliable. Some regular users prefer paper bags for their ability to be recycled in the yellow bin as this makes them feel they are doing the right thing by the environment by disposing of them properly, while others reuse plastic bags for various purposes. Sturdiness, large capacity, strong handles, and washability are important qualities identified by regular users in a desirable bag.

Occasional users also emphasise the importance of bag materials, particularly for weight distribution and practicality. They preferred strong bags with wider straps and heavier fabric to evenly distribute the weight while carrying items. Participants also considered a bag's ability to handle cold goods with condensation without compromising its structural integrity. Practicality and cleanliness were highly important factors in their bag choices, with some expressing a dislike for jute bags because they had a tendency to lose fibres and create 'mess' in the car.

Non-users prioritise durability, longevity, and sustainability in their bag choices. They value bags made from natural fibres like calico or cotton that can be washed, reused, or easily repaired. Compostable or biodegradable bags align with their environmental concerns. Non-users' expressed frustration with supermarket bags that incorporate plastic elements and emphasised the need for entirely compostable or biodegradable options. They also critiqued excessive packaging, particularly for items like vegetables, highlighting their awareness of unnecessary plastic waste generated through packaging.

Overall, all three user segments demonstrate different preferences and priorities when it comes to shopping bag choices that they believe will best suit their shopping needs. Regular users focus on sturdiness and washability, occasional users prioritise practicality, and non-users value durability, composability, and natural fibers.



# Shopping bag usage and habits

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**Regular users** demonstrated a preference for convenience and practicality, often opting for thicker plastic bags for their shopping needs. They tended to reuse these bags and found them more manageable compared to alternative options. Price and availability played a significant role in their bag choices, with some expressing frustration about the limited availability of alternative bag options in regional South Australia. Regular users were aware of environmental concerns but prioritised immediate practicality over long-term sustainability.



**Occasional users** showed a mixed level of consciousness regarding bag usage. Price is a significant factor for them, and they tended to shop where discounts were available. They often forgot to bring their alternative bags and relied on bags provided by the store. Occasional users use a combination of fabric and paper bags for different items, such as heavy-duty fabric bags for milk and paper bags for fruits and vegetables. While they acknowledged the importance of sustainability, their bag choices were influenced by convenience and their immediate shopping needs. One described having their bag choices influenced by their partner's habits, indicating some level of role modelling taking place.



**Non-users** demonstrated a strong commitment to sustainability and practicing behaviours which align with this value. They often opt to support local producers and green grocers over large supermarket chains. Non-users prioritised reusable bags and actively chose bags that were durable and suitable for different shopping purposes. They employed strategies to reduce their reliance on plastic bags, such as keeping bags in their handbags or cars to be readily accessible. Their bag choices include cloth or calico bags, jute bags, cardboard boxes, and netted/mesh bags, depending on the specific items being purchased. Non-users have developed these strategies over time, making conscious bag usage a second nature practice. They actively sought to avoid accumulating more bags and adjust their habits accordingly.



In summary, regular users prioritise convenience and practicality over long-term sustainability, occasional users show mixed consciousness and are driven by price and convenience, while non-users actively support sustainability and employ various strategies to avoid plastic bags. Availability influences bag choice for regular and occasional users, whereas non-users prioritise the durability and suitability of bags for their shopping needs. Regular and occasional users also show price sensitivity, while cost is less of a concern for non-users. Additionally, both regular and non-users value bags that are durable, long-lasting, and easily repairable or able to be repurposed.

# Purchasing/ accepting or declining new bags

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**Regular users** rely on thicker plastic bags due to forgetfulness or unplanned shopping trips. Their inability to remember their own bags leads to frequent purchases of plastic bags at the checkout. The convenience of plastic bags outweighs any environmental concerns for this segment. Repurposing thicker plastic bags, such as for cleaning or storage, further contributes to the continuous purchase of new bags. While some regular users decline plastic bags if they can carry their items, others accept them for the sake of convenience.

**Occasional users** often find themselves buying new bags due to larger shopping trips than initially intended. The decision to accept or purchase bags is primarily driven by price considerations rather than environmental consciousness. Occasional users described relying on retailer-provided bags while retail shopping because it was 'not common practice' to bring your own bags in this context. They may overstuff their bags to avoid extra bag purchases, although some individuals experienced a sense of guilt when accepting plastic bags, despite their awareness of the environmental impact. This internal conflict arose from the practical need to transport their purchased items, often relying on plastic bags for convenience. One suggested that 35c would be the threshold for purchasing a new bag, with others agreeing with this. Some further suggested that if they have more than they can carry, then they will buy a bag.

**Non-users'** core values around sustainability may increase the ease of remembering to bring bags to the shops. Values form the basis of people's decision-making since they prefer to align their actions with their values. Regarding non-users, they consistently bring their own bags from home in an effort to avoid thicker plastic bags and seemed to forget their bags less than other user segments. Some also described feeling guilty when using thicker plastic bags because they are more conscious of the environmental impacts and want to behave in ways that minimise this. This alignment of behaviour with value sets may therefore reduce the mental effort associated with remembering bags from home or remembering to take them out of the car before going into the shops. However, the prevalence of plastic bag use in the community presents challenges for avoidance in some circumstances, one such example from a non-user was when the local butcher kept insisting on using plastic bags despite the non-user protesting this.



# Ban reactions and behaviour change

**Regular users** demonstrated a generally positive outlook on the upcoming ban on thicker plastic bags, although a few expressed concerns about the availability and hygiene of alternative options. Some suggested that plastic bags can be reused in more ways than the alternative types of bags, others said that for plastic bags to be banned while there is still a lot of packaging on food products available at supermarkets is conflicting or does not make sense to them. Despite some protest, regular users expressed that they didn't feel it would be a big adjustment to transition to alternative bag types and that they will simply have to remember their bags from home or use the alternatives provided at checkout. Most assumed that the only other alternative at a similar price to the thicker plastic bags would be the paper ones.

**Occasional users** held a positive sentiment toward the ban, considering it a long overdue measure. They had confidence in people's ability to adapt and find alternatives. Occasional users saw cardboard boxes and hessian bags as viable options and believed that the ban itself will serve as a motivator for greater use of reusable bags. They expected retailers to provide sensible alternatives and anticipated a smooth transition.

**Non-users** had a strong and positive sentiment toward the ban, considering it a necessary measure to address environmental damage. They emphasised the importance of education and effective messaging strategies to facilitate behaviour change. Non-users acknowledged the initial effort required for the transition, with some saying it can be quite a large adjustment at times but emphasised the importance of planning ahead and making reusable bags part of daily routines.

Overall, regular users, occasional users, and non-users all exhibit a general understanding of the environmental issues associated with plastic bags and express support for sustainable alternatives. While regular users and occasional users may face challenges in terms of habit change, non-users demonstrate that although the initial transition may require adjustment in terms of developing new habits, these new habits will become second nature over time.

*I'll probably leave it right until I'm forced to make a change. – Regular user*

*I was happy when heard about it, it's positive news. It might be inconvenient in the short-term but it's probably worth it. – Regular user*

*It's confusing because you are still putting your vegetables into plastic bags. – Regular user*

*Hopefully encourages other people to change their habits. – Occasional user*

*It's about time. – Non-user*

*People will adapt, don't think it will be a problem. – Occasional user*

*It's a good idea, somewhat imposing on people without a chance to say yes and no, but necessary. – Non-user*

*I'm not worried about it; we have our alternatives. – Occasional user*



# Optimising future communications

All user segments emphasised the importance of effective communication strategies to raise awareness about the thicker plastic bag ban and promote behaviour change. They believed that concise and impactful messaging was essential.

A range of strategies were suggested to promote the ban and give impacted South Australians time to transition away from thicker plastic bags, and assist in shifting mindsets toward the use of plastics:



1. Retailers playing an active role in early communications to inform the public and make alternative bag options available.



2. Highlighting South Australia as a leader in the environmental space and its success in eliminating single-use plastics among other achievements. Using this history to emphasise that this ban is the next step for South Australia in taking the lead.



3. Providing reusable bags to individuals as necessary tools and resources to help them adapt quickly to the change.



4. Emphasising statistics and figures to explain the purpose behind the ban and justify its implementation, noting the broader impacts of plastic pollution.



5. Engaging children in communication campaigns, as some suggested that parents are more likely to listen to their children, and others expressed that early education was key in shifting mindsets into adulthood.



6. Engaging influential people who may resonate with younger audiences.



7. Framing the issue of plastic pollution as not just an overseas problem, but a domestic issue as well, highlighting the presence of plastic waste on local beaches.

Participants proposed various communication channels and mediums to ensure broad reach and engagement, including:

- Outdoor/ bus stops
- TV
- Radio
- Social media (Facebook, Tik Tok)
- Direct communications from retailers (emails, posters in-store, etc.)

# Optimising future communications



*I want to see some stats and real figures. Why are we doing it? What are the impacts?*  
– **Regular user**

*Info at supermarket, retail areas, bus stops, at checkouts.* – **Regular user**

*Young people listen to young people, they could use iconic people that have influence to get the message through.* – **Non-user**

*Provide short and sharp information, explain using plastic bags uses a lot of energy and is harmful to the environment.*  
– **Non-user**

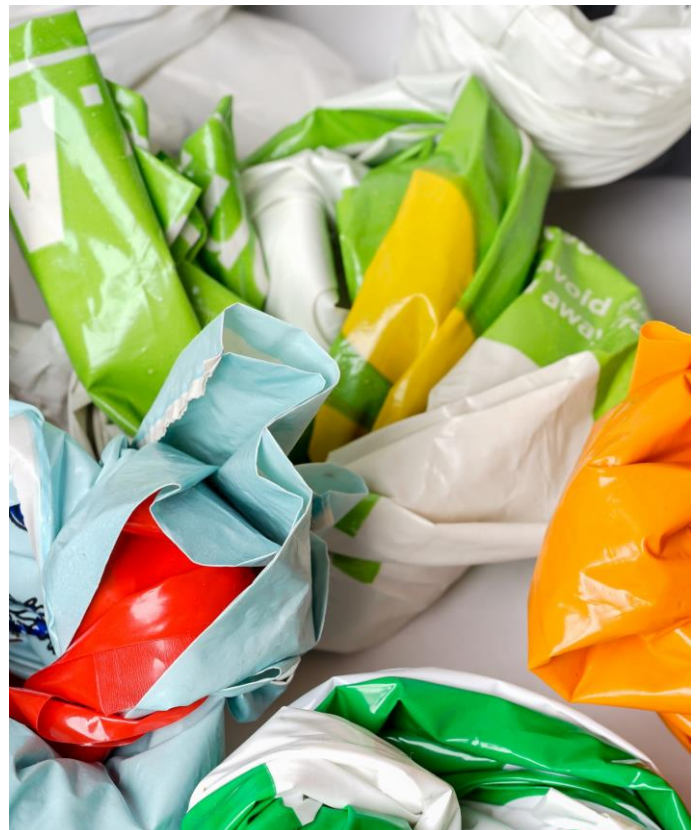
*Show what the impact of plastic bags is on the environment.* – **Occasional user**

*A campaign that gets kids involved, SA is a leader in these things, get kids to be the face and purpose behind it.* – **Non-user**

*Retailers should be talking about the ban and make sure there is an alternative available when it happens.* – **Occasional user**

*Start with early education, but don't stop there.* – **Occasional user**

*Needs to be visual and in common places, really in your face sort of thing.* – **Regular user**





# User Profiles

# User profile – Non-user cohort



*When you get a plastic bag, it makes you feel like you've failed. – Non-user*

*If I can't avoid it, it kind of makes me hate myself. It goes against my ethos. – Non-user*

*If I forget my bags, I just take them to the car as loose items. – Non-user*

*Our society always seems to put bags in bags in bags, it's just not necessary, we don't need all of these bags all the time. – Non-user*

*I use different bags depending on what I'm buying at the shops. Jute for fruit and veg, calico bags and general reusable bags for retail shopping etc. – Non-user*

*It's hard when I go to my local butcher – they will give me a bag because it's messy, but I always refuse it from them. – Non-user*

*I have been avoiding plastic bags for years – SA has been a leader in recycling bottles, etc., I've been going away from plastics even before the government banned it. – Non-user*

*It was a period of change; I would forget taking it for some time- it's like any habit, it takes a while before it becomes second nature. – Non-user*

## Motivations:

- Resourceful
- Sustainable
- Environmental ethos
- Environment strongly tied to identity

## Barriers/ concerns/ pain points:

- Prevalence and norm of using plastic bags sometimes make them hard to avoid

## Adapt easily to the ban:

- Already doing the desired behaviour

# User profiles – Occasional user cohort



*I accept plastic bags more often than I would like – I feel a bit guilty but have to get it to the car, I'm not in the habit of bringing a bag to the retail store. – Occasional user*

*I don't give [sustainability and the environment] a lot of thought – wastage is at the back of mind, but I don't think as deeply as I should. – Occasional user*

*Plastic bags come in handy at home. – Occasional user*

*People will adapt, don't think it will be a problem. – Occasional user*

*If you don't get [plastic bags] you will just change and adapt if you need to. We have alternatives at home anyway. – Occasional user*

*I use them as a bin liners because other bin liners you purchase are too thin. – Occasional user*

*Usually take a combination of fabric and paper bags – heavy duty for milk, paper for fruit and veg. – Occasional user*

*If they charge me for it in retail, I'm more inclined to decline the bag. I'm probably more price driven than driven by the environment. – Occasional user*

## Motivations/ drivers:

- Price of bags; cheaper options are better

## Barriers/ concerns/pain points:

- Most reuse the thicker plastic bags they get for another purpose, like putting nappies in, as a bin liner, or giving away items or putting leaky containers into.
- Seem to be at risk of forgetting bags even though they have them.
- Somewhat environmentally conscious, but not strong enough to activate behaviour change.

## Adapt easily to the ban:

- Already doing the desired behaviour for the most part and, accept whatever is available.
- If thicker plastic bags are not available, they will simply use other alternatives that are available at the time – not fussed.

# User profiles – Regular user cohort



## Motivations/ drivers:

- Cost of bags
- Convenience

## Barriers/ concerns/ pain points:

- Preference for plastic bags because they have had poor experiences with alternative bag types
- Purposely buy new bags at checkout
- Repurpose/ reuse plastic bags

## Adapt easily to the ban:

- Require encouragement to switch to more sustainable alternatives for long-term use
- Require additional evidence to provide justification for changing behaviour
- Reliant on thicker plastic bags

*Generally, I don't take bags with me because I like the plastic bags. – Regular users*

*When I get plastic bags, I tend to reuse them as much as possible – in the rubbish bin or to collect cans and bottles. – Regular users*

*Environmentally friendly bags don't last, I get frustrated with them. – Regular users*

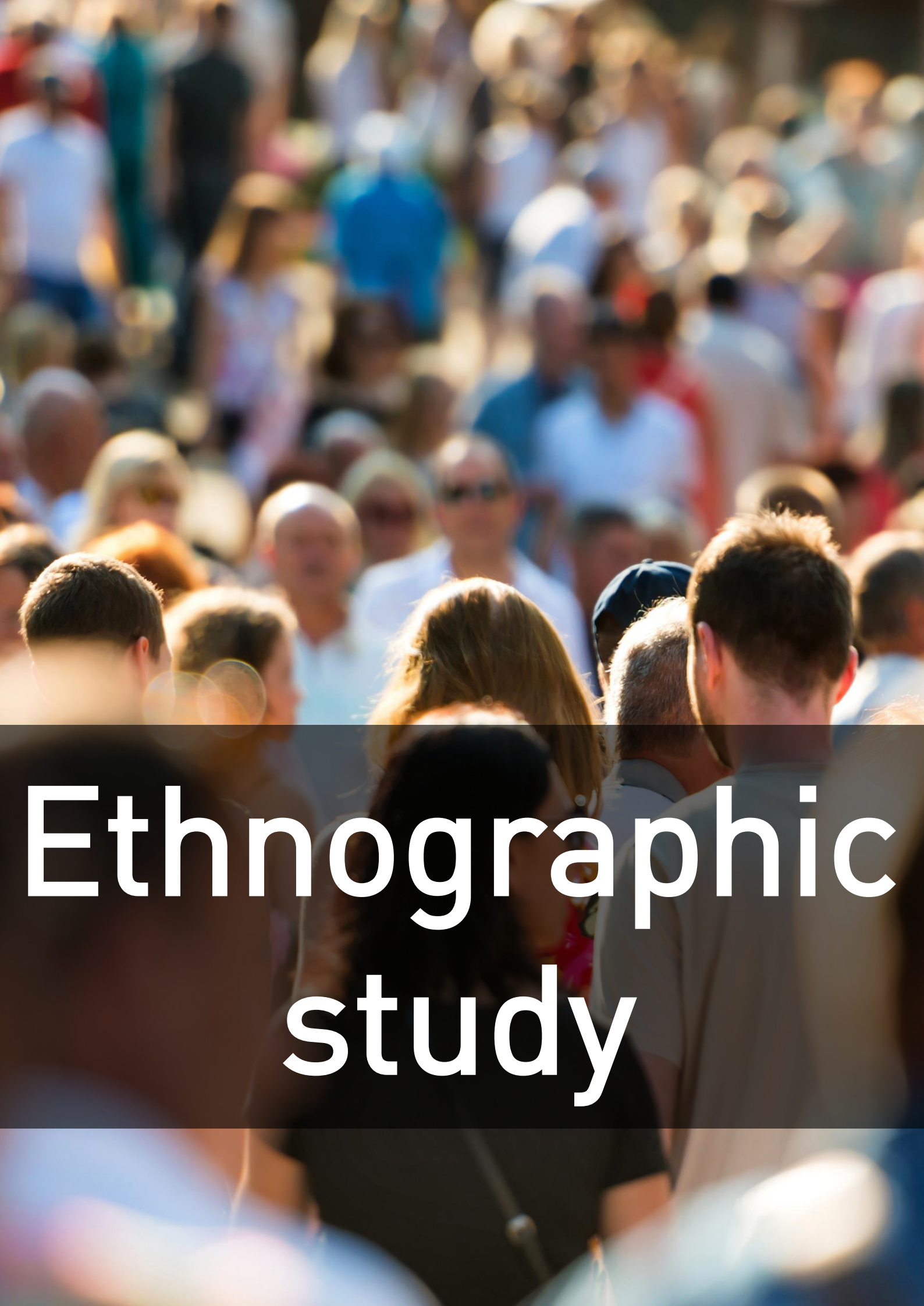
*If the reusable bags were a comparable price or cheaper, I would consider them. About 35 cents would be my limit. – Regular users*

*You get more purpose out of plastic bags; you get more value out of reusing them rather than environmentally friendly options. – Regular users*

*Reusable bags can be inconvenient because you need to roll them up and store them. – Regular users*

*I don't mind paying a dollar or two if I get a lot of use out of them. – Regular users*

*We will be forced to remember – at the moment the biggest reason is that we are lazy. I don't think it will be a big adjustment or challenge, we're just lazy. – Regular users*



# Ethnographic study

# 781

Observations in total  
across eight sites



Brought bags  
from home



Purchased/  
accepted a non-  
plastic bag



Purchased a  
heavyweight bag

1138 bags in total were observed being used across  
all observations.

# 202

of these were heavyweight bags.

Brought a bag from  
home



**42%** High SES  
locations

**24%** Low SES  
locations

**25%** Arndale

**10%** Rundle Mall  
& surrounds

Purchased/ accepted a  
non-plastic bag



**10%** High SES  
locations

**41%** Low SES  
locations

**25%** Arndale

**25%** Rundle Mall  
& surrounds

Purchased a  
heavyweight plastic bag



**18%** High SES  
locations

**15%** Low SES  
locations

**19%** Arndale

**48%** Rundle Mall  
& surrounds

\*Sample sizes were not equal across sites or locations due to variations in foot traffic on given days, which may influence observation results



# Ethnographic study- Observations

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826 observations were conducted across high, low, and mixed socio-economic (SES) locations, This included: Burnside Village, Rundle Mall and surrounds, Arndale Shopping Centre, Frewville Foodland, Drakes Wayville, Elizabeth Vale IGA, Smithfield Aldi, and Hollywood Plaza. Each location had varying degrees of foot traffic. The different shopping locations also had varied shopping habits and behaviours, although some common themes came across all areas as well.



## **BROUGHT FROM HOME VERSUS PURCHASED/ ACCEPTED A BAG:**

Overall, the majority brought their own bags from home, although those from lower SES locations were half as likely to bring bags from home. The large majority of these bags were non-plastic reusable ones, however, there were also observed to be a demographic of people bringing the thicker plastic bags from home as well. Rundle Mall had a higher incidence of people retail shopping and a higher level of foot traffic compared to the other locations, meaning the purchase/ acceptance of bags from retail stores and takeaway food outlets was higher. The city also seemed to have a higher incidence of people doing unintended/ pop-in shops compared to other locations, possibly leading to a higher likelihood of buying thicker bags when grocery shopping. Older people tended to always bring bags, middle aged or younger seemed to be more likely to go without bags or buy bags at the shops if needed. This could be attributed to a higher incidence of impromptu shopping visits in younger cohorts (e.g., popping in between locations) compared to older cohorts who may have more planned trips to the shops.



## **BAG PREFERENCES:**

Many preferred to avoid plastic bags and use their non-plastic reusable ones instead. This showed a heightened sense of environmental consciousness across the majority in each location. Some described still using the plastic ones or still having them in their collection of bags at home, with some re-purposing them as bin liners for landfill or to put their loose recyclables in. Arndale Shopping Centre and Aldi had a higher incidence of people putting loose items in their trolleys instead of purchasing a new bag and instead loading their items into bags at their cars.

The way people chose to dispose of the bags or reuse them was relatively similar across all areas. Paper or hard cardboard bags were generally recycled and bought heavy weight plastics were mostly added to the 'stash' people had at home.



## **RETAILERS:**

Almost all retailers tended to give paper or laminated bags to their customers, with some consumers indicating they would recycle these. Paper food bags from street carts or takeaway food places were generally thrown in the rubbish bins provided in public spaces. Some retailers offered tote-style charity bags, varying between calico/canvas and fabric options.

# Intercept comments

I only bought a bag because I had to get a few items on my way into work for lunch.  
– **Burnside Village**

Once you have [non-plastic reusable bags] you don't need the plastic ones. – **Burnside Village**

I try to limit my plastic waste as much as possible. – **Rundle Mall**

I prefer the non-plastic bags but I have a few plastic ones at home still. – **Burnside Village**

I use my plastic bags to put my loose recyclables in. – **Rundle Mall**



If I need to buy a new bag, I'd prefer to get the nicer ones I can reuse rather than the plastic ones. These ones won't break [non-plastic reusable bags]. – **Frewville**

I have a lot of bags at home so I just prefer to use those instead of buying new ones.  
– **Burnside Village**

I buy [thicker] plastic bags every time I go to the shop. I don't carry any bags with me because I usually only get a small amount but can't be bothered carrying it. – **Rundle Mall**

My wife recycles the plastic ones, we usually always bring bags with us unless we forget, like today. – **Smithfield**

I have a lot of bags at home so I may as well just use those. – **Arndale**

I prefer buying the paper Woolies ones if any because I can put my recyclables in there to put in the yellow bin. – **Wayville**

I usually keep some in my car so I don't forget them. – **Arndale**

I prefer using my own bags so I'm not using plastic waste as much. – **Hollywood Plaza**

I'm kind of just popping in, I usually bring my bags with me if I'm doing my weekly shop. – **Hollywood Plaza**

The compostable break really easily, but I can use it for my food scraps while I'm cooking, so I don't mind them. – **Arndale**

It's too hard to load it all into bags [at Aldi] so I usually just put all the items in the trolley and then load them at the car. – **Smithfield**

I bought [trolley clip bags] at Aldi. They're a lot more convenient compared to other bags.  
– **Smithfield**

I just don't really like the plastic ones.  
– **Wayville**



# Focus group composition

# Focus group composition

## Group 1: Occasional users

Gender	Age	Location	Use of plastic bags	Reasons for buying bags
Female	59	Burnside	Use for a purpose not listed	I forgot my usual (non-plastic) reusable bags
Female	60	Encounter Bay	Retail shopping	It was the only option available to purchase from the store
Female	56	Whyalla Playford	Grocery shopping	I did a bigger shop than intended
Female	74	Hackham	Retail shopping	I did a bigger shop than intended
Male	38	Richmond	Retail shopping	Unplanned shop
Male	36	Modbury Heights	Use for a purpose not listed	I forgot my usual (non-plastic) reusable bags
Male	35	Findon	Grocery shopping	Unplanned shop
Male	46	Unley	Retail shopping	I forgot my usual (non-plastic) reusable bags

## Group 2: Non-users

Gender	Age	Location	Use of plastic bags	Reasons for buying bags
Female	59	Nairne	Do not use thicker plastic bags for any purpose	Never purchase new bags
Male	48	Wayville		I did a bigger shop than intended
Female	48	Klemzig		I forgot my usual reusable plastic bags
Female	79	Encounter Bay		Unplanned shop
Female	54	Birkenhead		Never purchase new bags
Male	63	Renown Park		It was the only option available to purchase from the store
Male	63	Brukung		It was the only option available to purchase from the store
Male	54	Woodville South		Never purchase new bags

# Focus group composition

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## Group 3: Regular users

Gender	Age	Location	Use of plastic bags	Reasons for buying bags
Female	48	Uleybury	Grocery shopping	I forgot my usual (non-plastic) reusable bags
Female	24	Highgate	Grocery shopping	I forgot my usual reusable plastic bags
Female	54	Murray Bridge	Grocery shopping	They are cheaper
Male	68	Port Augusta	Retail shopping	Never purchase new bags
Male	46	Pt Lincoln	Grocery shopping	It was the only option available to purchase from the store
Male	63	West Lakes	Grocery shopping	I forgot my usual reusable plastic bags
Male	60	Joslin	Takeaway Food	Never purchase new bags
Female	23	Clovelly Park	Grocery shopping	It was the only option available to purchase from the store

MCGREGOR TAN  
RESEARCH. STRATEGY. SOLUTIONS.

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THANK YOU