

Quantitative Study - Exploratory Analysis

"Plastic Law" Perceptions and Expectations in Dakar

April 2020



Context



Senegal

Dakar

This quantitative research is based on a sample of **206 residents of Dakar and its suburbs**, who expressed their **perceptions and expectations regarding the "Plastic law" in Senegal**, a few days before its entry into force on April 20th, 2020.

This study is the result of a partnership between the **Association Zero Waste Senegal**, and **LOOKA, a Market Research Service for Africa**, to spark initiatives and favor public-private collaborations for the **respect of the environment in Senegal**.



206 questionnaires (101 merchants, 105 consumers)



9 neighborhoods



10 surveyors



Introduction

The Association Zero Waste Senegal campaigns to raise awareness against massive waste production and to propose sanitary and environmental solutions. In its approach, the association relies on the **5 "R's"**, namely refuse, reduce, reuse, recycle and return (give back) to the earth. In the Senegalese context, it also supports a more responsible and sustainable management of waste that cannot be avoided.

The Association Zero Waste Senegal asked for the support of **LOOKA** to carry out a study on the perceptions and expectations of Dakar's population regarding the **law n°2020 - 04 of January 8th, 2020, commonly known as the "Plastic law"**, which deals with the prevention and reduction of the environmental impact of plastic products.

This law, came into force on April 20, 2020, as a follow-up from the law **n° 2015 - 09 of May 04, 2015** prohibiting, amongst other things, "light plastic bags" of less than 30 microns. This second law repeals and replaces the previous one, which has seen limited enforcement. This initiative is part of the national **"Zero Waste" program of the Senegalese government.**

Source

[1] Bureau d'Information Gouvernementale (BIG) of Senegal

This new law includes, but is not limited to, the following [1]:

- the prohibition of certain **single-use plastic products**
- a total ban on plastic **checkout bags**
- a plastic bottle **deposit system**
- the obligation for **producers to ensure the management of waste** from the products they put on the market
- the imposition of a **tax on non-recyclable** plastic materials
- **a ban on importing** plastic waste in Senegal.

The **COVID-19** epidemic is part of the context of this study and must be taken into account when **perusing the data** (curfew, closure of markets and schools, warnings to stay at home, banned gatherings and intra-regional travels..).

The aim of this study is to **highlight** what consumers and merchants **know about the law**, their concerns **regarding the transition**, and how they perceive **alternatives** to plastic. The lessons learned from this study, "hot takes" from the respondents, shed light on the potential **impact of the implementation of the "Plastic law" in the current context.**



Methodology

The sample of respondents is as representative as possible, taking into account current measures of **social distancing** and **health concerns** for our surveyors.

A targeted sample drawn from the contacts of our investigators was carried out according to **several criteria (age, gender, neighborhoods, and professional activity)**. The answers given **highlight trends** that reflect the demographics of the Senegalese population, without the pretension of statistical representativeness at the national level.

Demographic Information

- **Gender:** 54% male and 46% female
- **Digitalisation:** Total of 84% of smartphones (*74% for merchants, 95% for consumers*), 9% of standard phones and 7% of both
- **Age:** 18 years old or above, 68% are under 35 years old
- **Consumers:** 28% employees, 26% students, 13% managers or heads of companies, 11% unemployed, 10% workers or craftsmen, and 12% other categories.
- **Merchants:** 24% of shopkeepers, 20% of fruits & vegetables merchants, 16% of Touba coffee merchants, 15% of online merchants, 7% of water sachets merchants and 18% other activities.

Data collection

Our surveyors conducted this study by **telephone interviews in Wolof, Fulani, and French** using a directive questionnaire drawn up on our collection tool: the **LOOKA mobile application**.

Each questionnaire has been **validated by our Lab and Data Analyst**, based on our **questionnaire verification interface** developed for this purpose.

Confidence Interval

The sample of 206 people represents the target population **at a 95% confidence level** and a **6.8% margin of error**.

Dates

April 10: Pre-tests — adaptation of the questionnaire

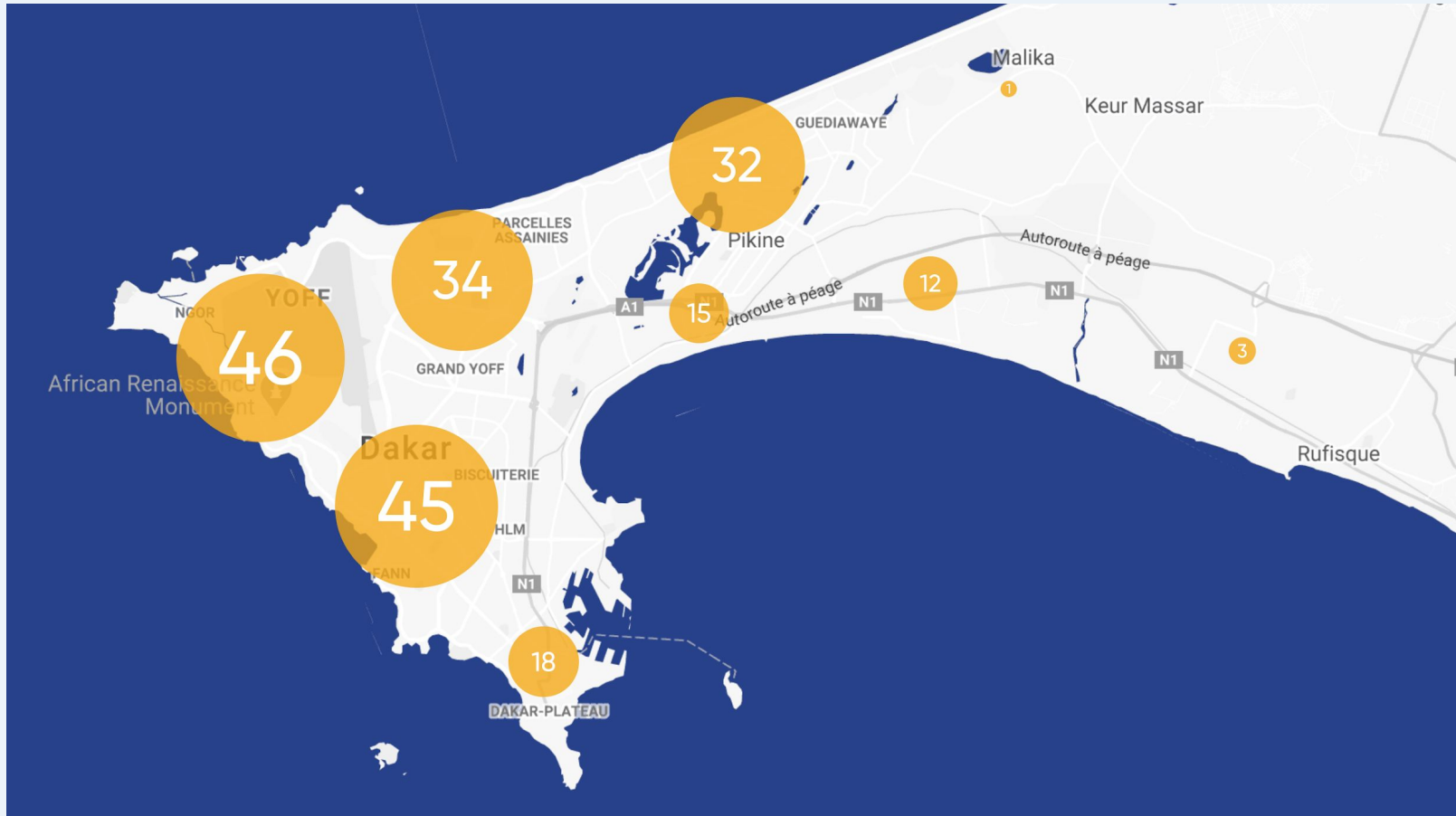
April 11-16: Telephone interviews — 5 days

April 20: The law came into force



“Plastic Law”: Perceptions and Expectations in Dakar

| Study Scope



The survey covers **9 neighborhoods** in Dakar and its suburbs:

- Grand Dakar
- Almadies
- Dakar Plateau
- Parcelles Assainies
- Guédiawaye
- Pikine
- Niayes
- Thiaroye
- Rufisque



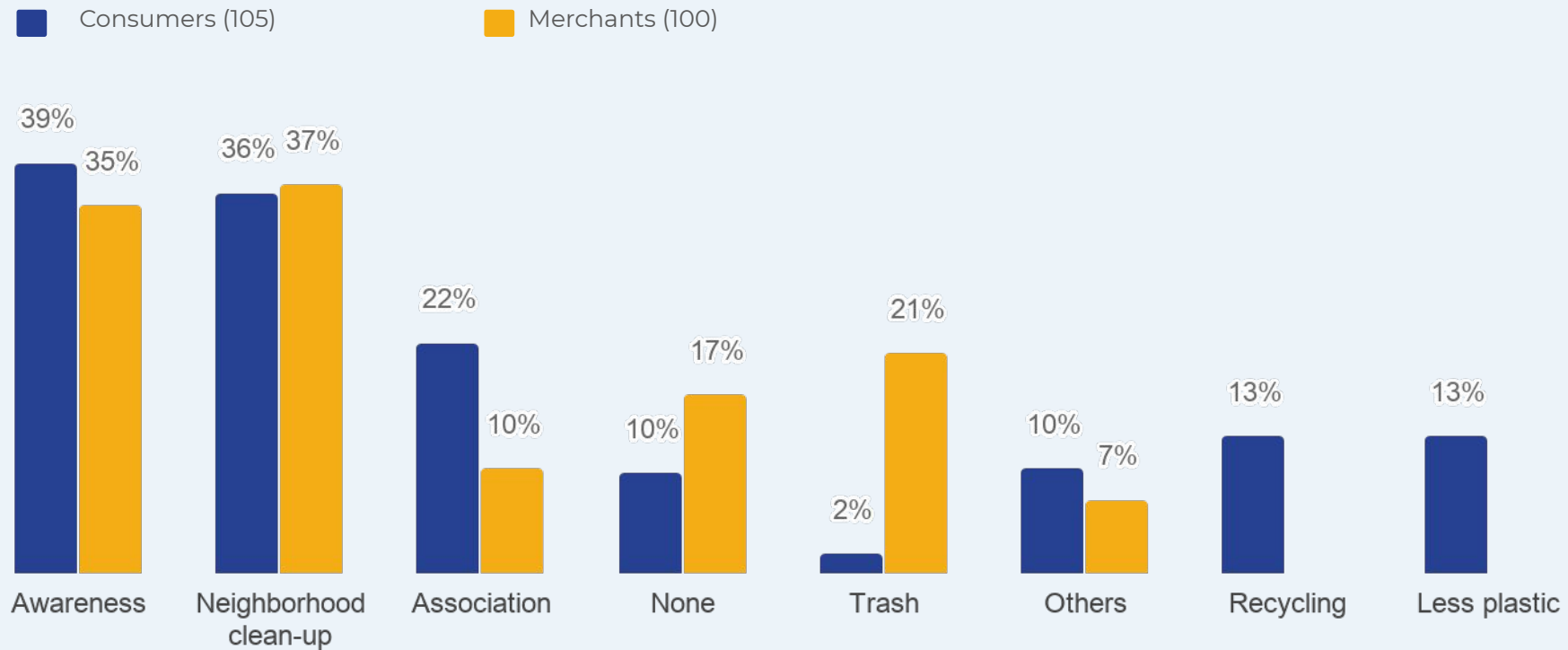
Pollution in Dakar & Actions of its residents



“Plastic Law”: Perceptions and Expectations in Dakar



Do you engage in actions for the respect of the environment? *(Multiple answers possible)*



Examples of **neighborhood clean-up initiatives:**

- *Cleaning Day* initiative by the President Macky Sall
- *Set Setal* movement, “to clean and make clean” in Wolof
- Challenges on Facebook that encourage young people to collect waste and take pictures before and after.

Others

- Planting (3%)
- Composting (3%)
- Washing utensils (3%)
- Market cleaning fee (1%)

More than 1/3 of total respondents raise awareness and participate in neighborhood clean-ups

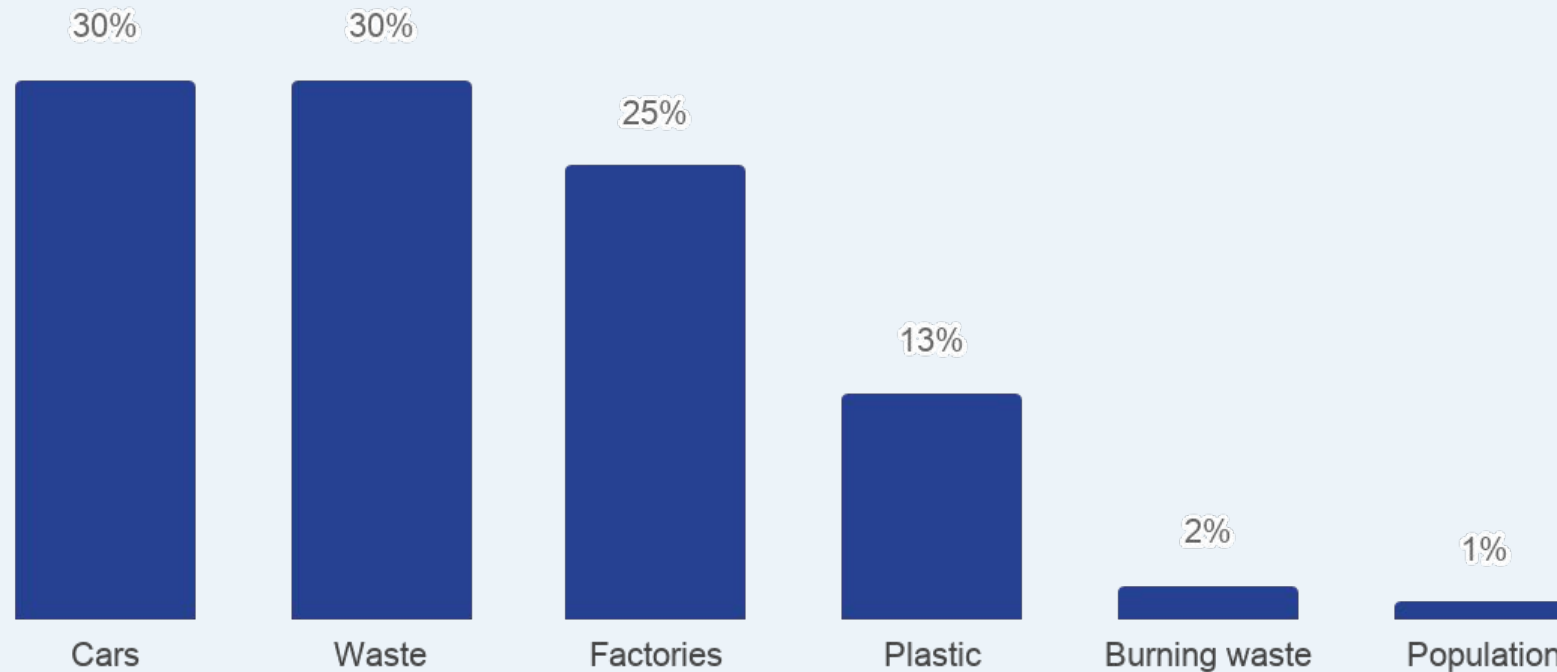


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? What do you think is the biggest source of pollution?

Consumers (105)



Different types of waste:

- Uncollected garbage cans
- Street waste
- Beach waste
- Toxic waste (ex: from factories and hospitals)

NB: at this stage, respondents do not know yet that the questionnaire deals with the “Plastic law”.

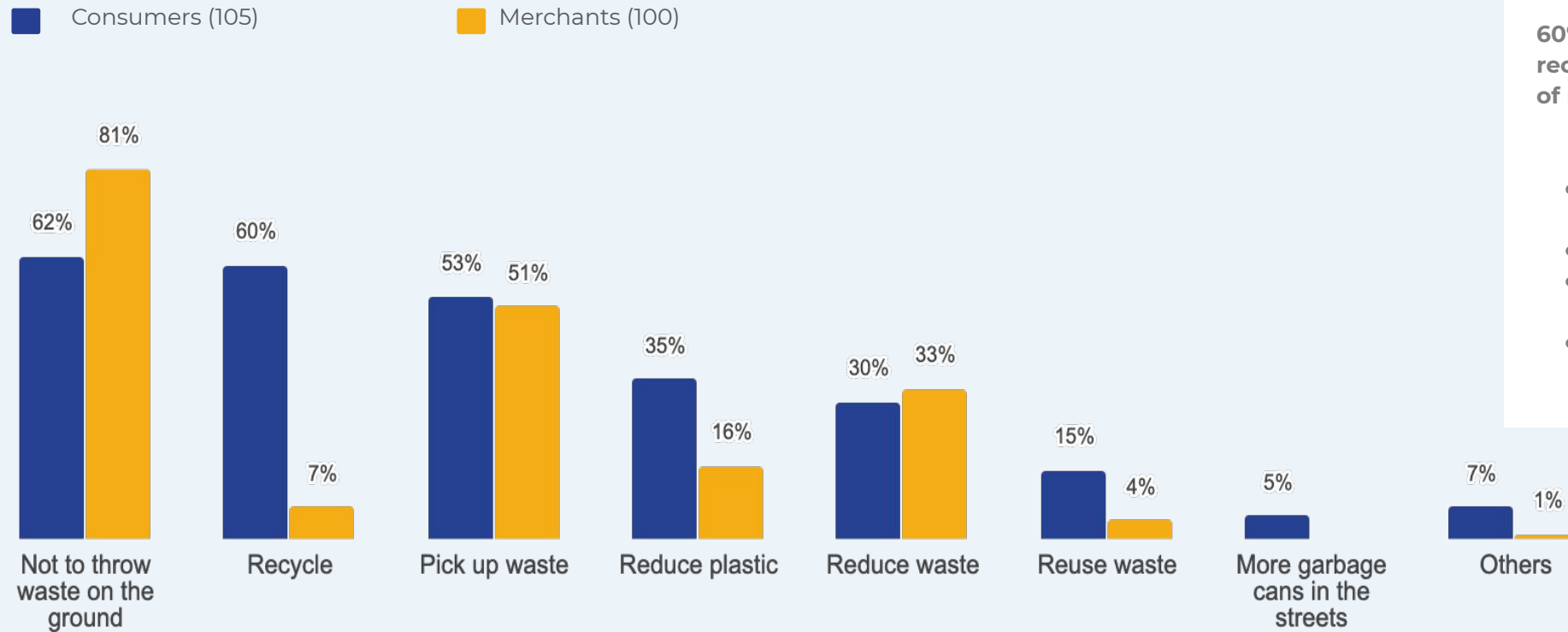
| For 45%, the main sources of pollution are linked to waste



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? What are your priorities regarding waste? (Multiple answers possible)



60% of consumers favor recycling, compared to 7% of merchants.

Others

- Raising awareness (3%)
- Burning waste (2%)
- Use garbage cans (2%)
- Pay for garbage men (1%)

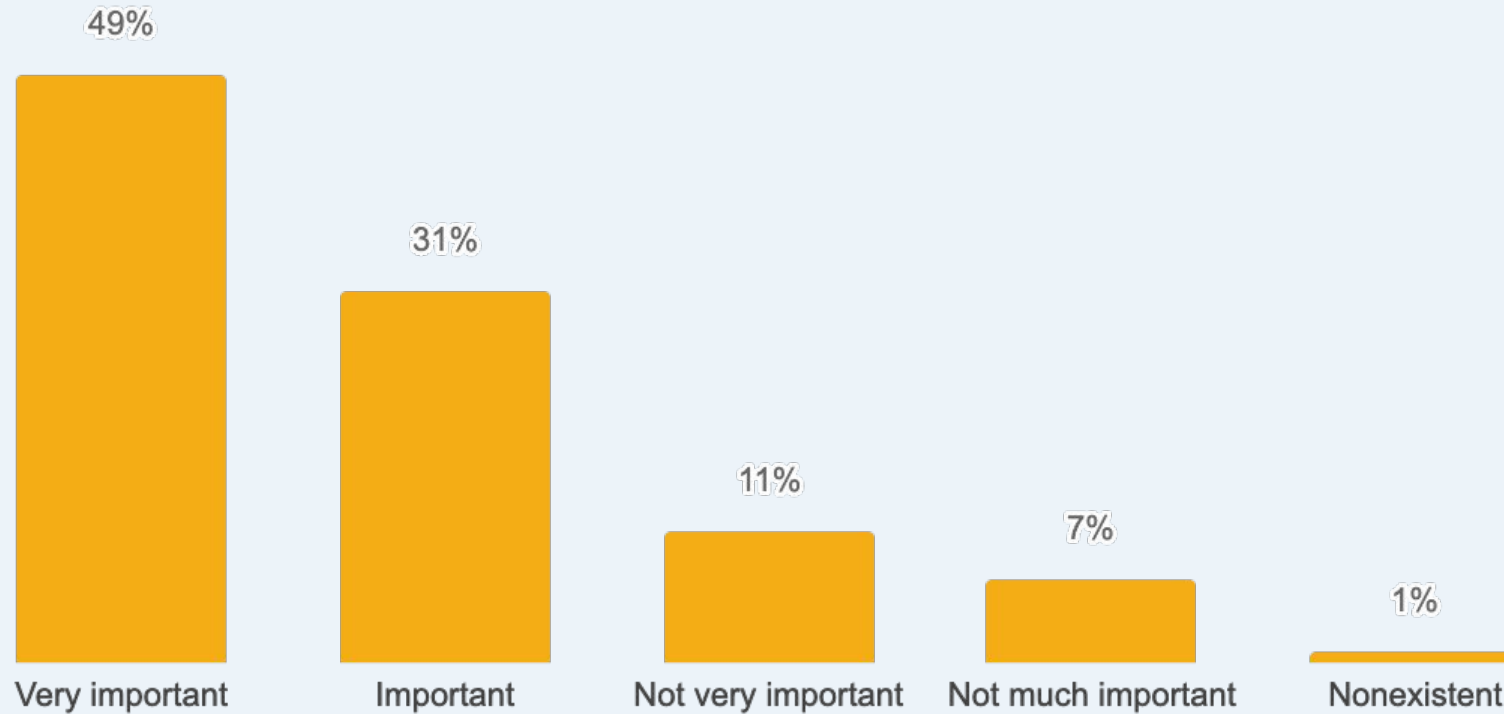
| For 72%, the priority is not to throw waste on the ground



“Plastic Law”: Perceptions and Expectations in Dakar

How important is the use of plastic in your business?

Merchants (100)



80% of merchants have an important or very important use of plastic in their business




Different types of uses:

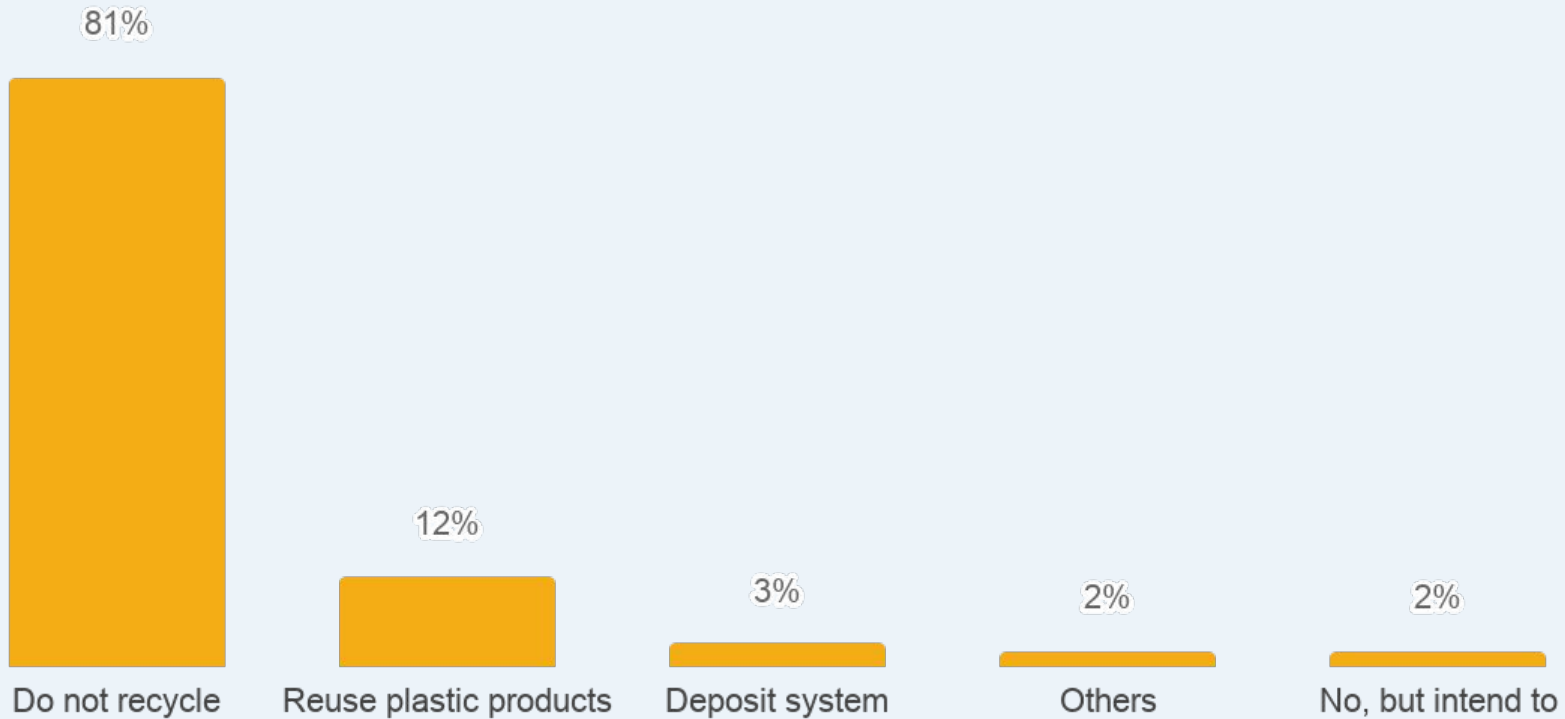
- Packaging in shops & supermarkets
- Water sachets
- Coffee cups
- Bags for fruits & vegetables
- Packaging for delivery



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 Do you recycle? *(Multiple answers possible)*

 Merchants (100)



80% of merchants have a high use of plastic, yet **81% do not recycle.**

| *81% of merchants do not recycle*

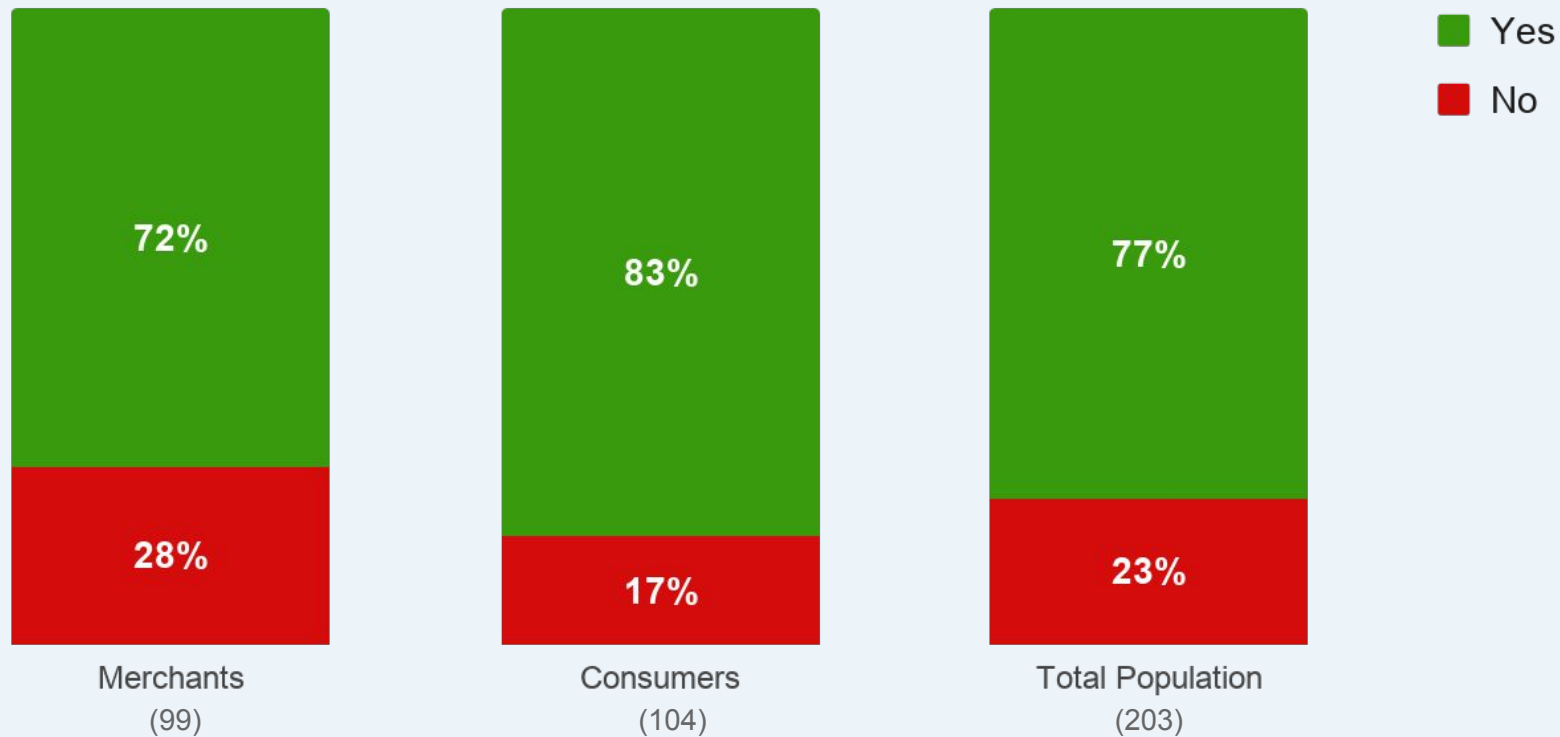


Awareness and reactions to the "Plastic law"



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Have you heard of the "Plastic law" that will prohibit a certain number of single-use plastic products?



Out of 203 respondents, **157 have heard of it (77%)**.

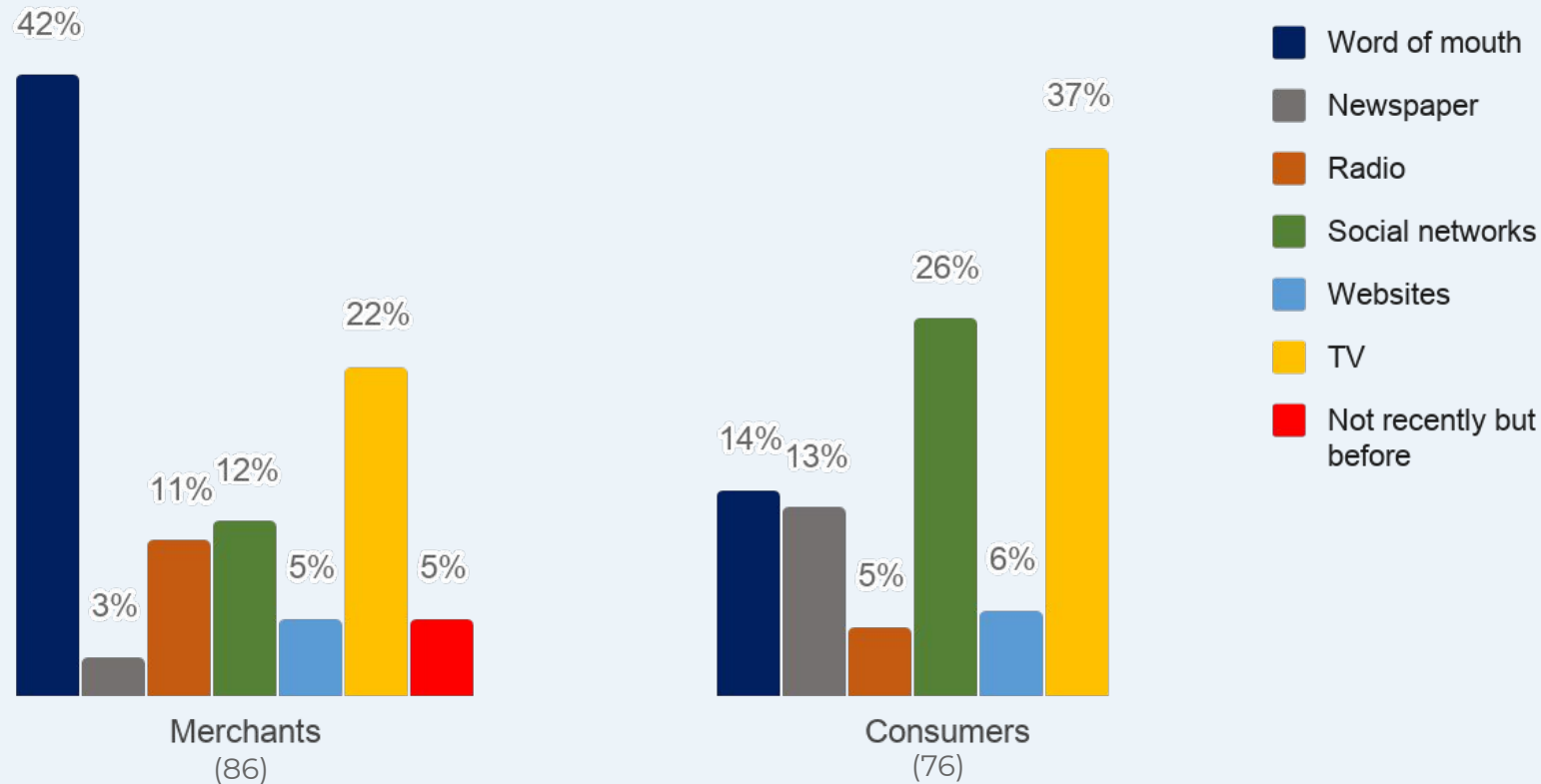
Certain respondents **mixup both plastic laws**, the one from 2015 and the more recent one.

| In total, more than 3 out of 4 people have heard of the "Plastic law"



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? If you've heard of it, how?



37% of consumers were informed by TV:

- Interviews on news channels
- Wareef broadcast on TFM
- Reporting on waste collection initiatives

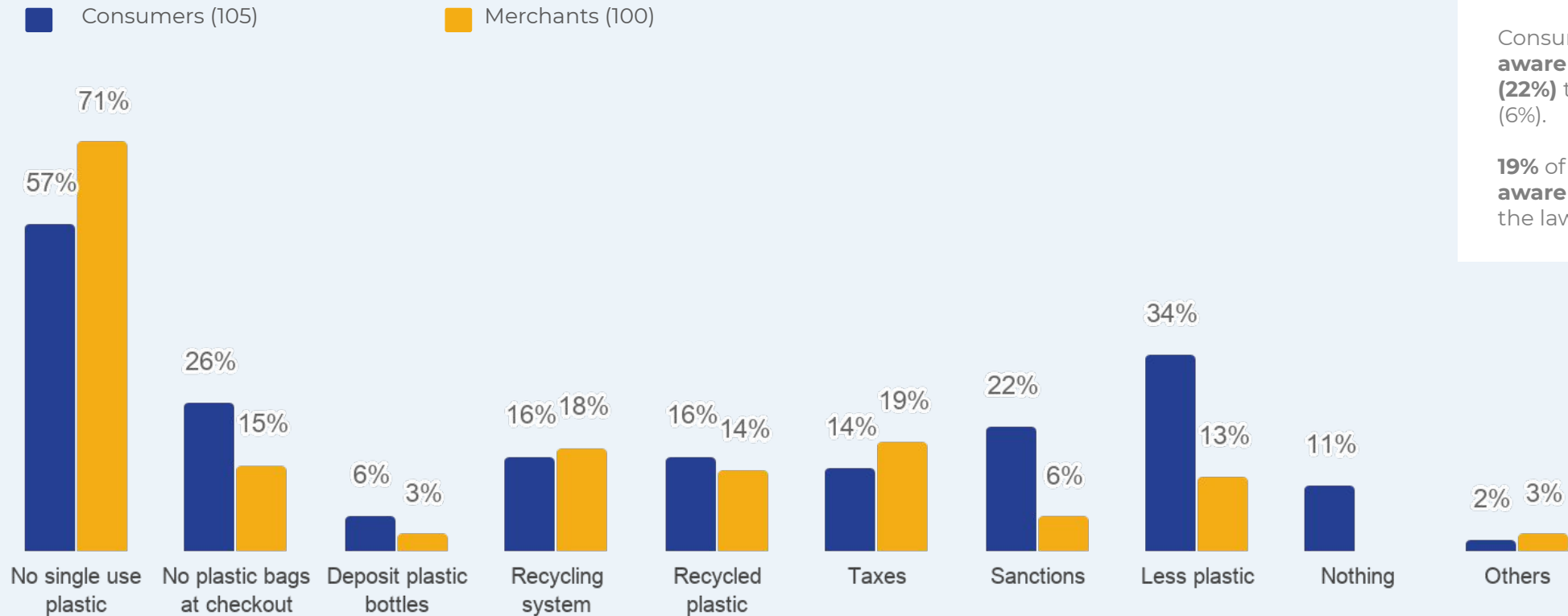
The answer **“not recently but before”** was expressed by merchants referring to the 2015 law.

The majority has heard about the law through word of mouth and the television



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🔍 If you've heard of it, what do you know about it? *(Multiple answers possible)*



Consumers are more **aware of sanctions (22%)** than merchants (6%).

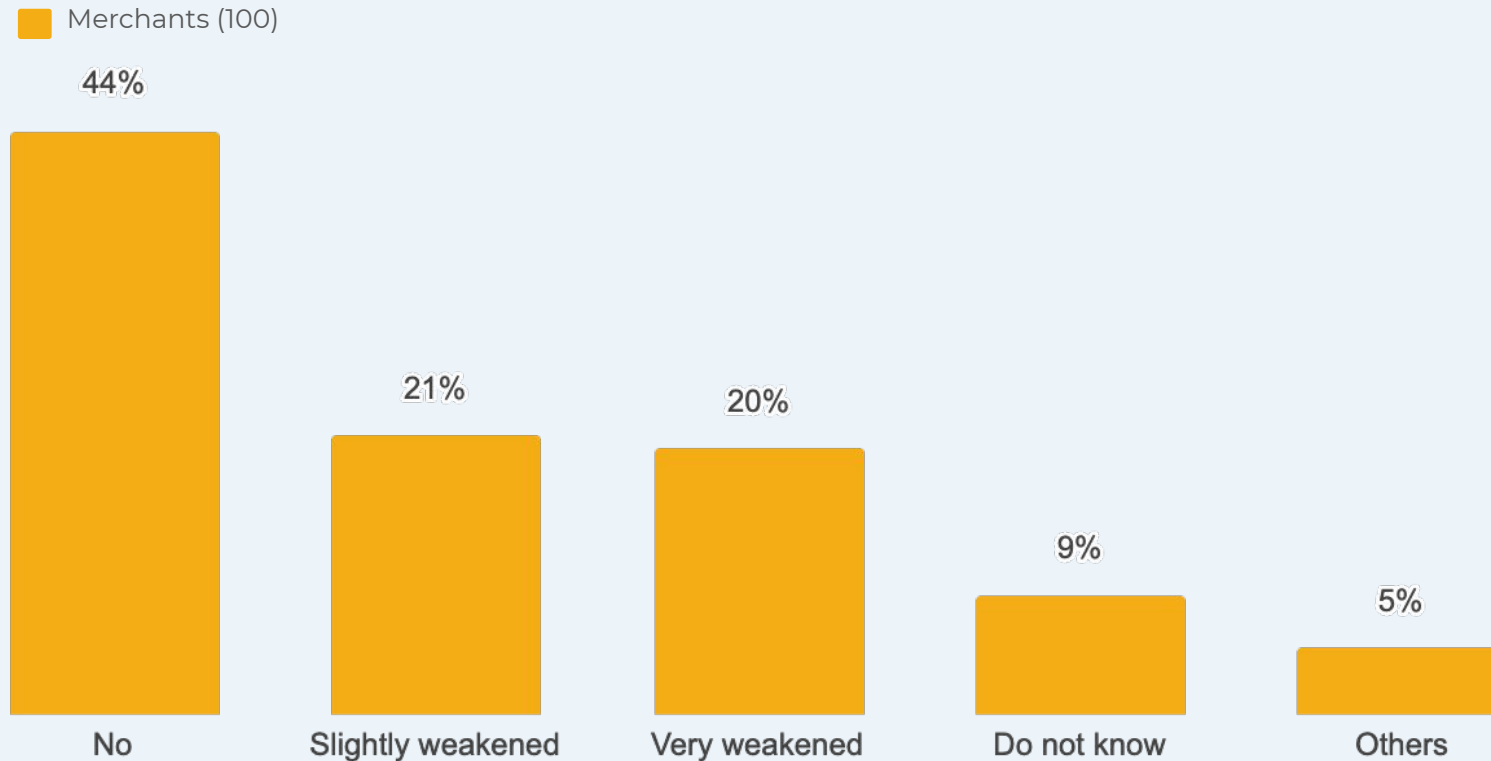
19% of merchants are **aware of taxes** linked to the law.

| In total, 64% are aware that the law prohibits single-use plastics



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Do you think that your turnover can be weakened by the "Plastic law"?



Others

(each answer is 1%)

- "My business will disappear"
- "Weakened if the new plastic bags are expensive"
- "We'll save money if we don't have to buy plastic bags anymore"
- "It will depend on the price"
- "That's fine because I won't be buying any more bags"

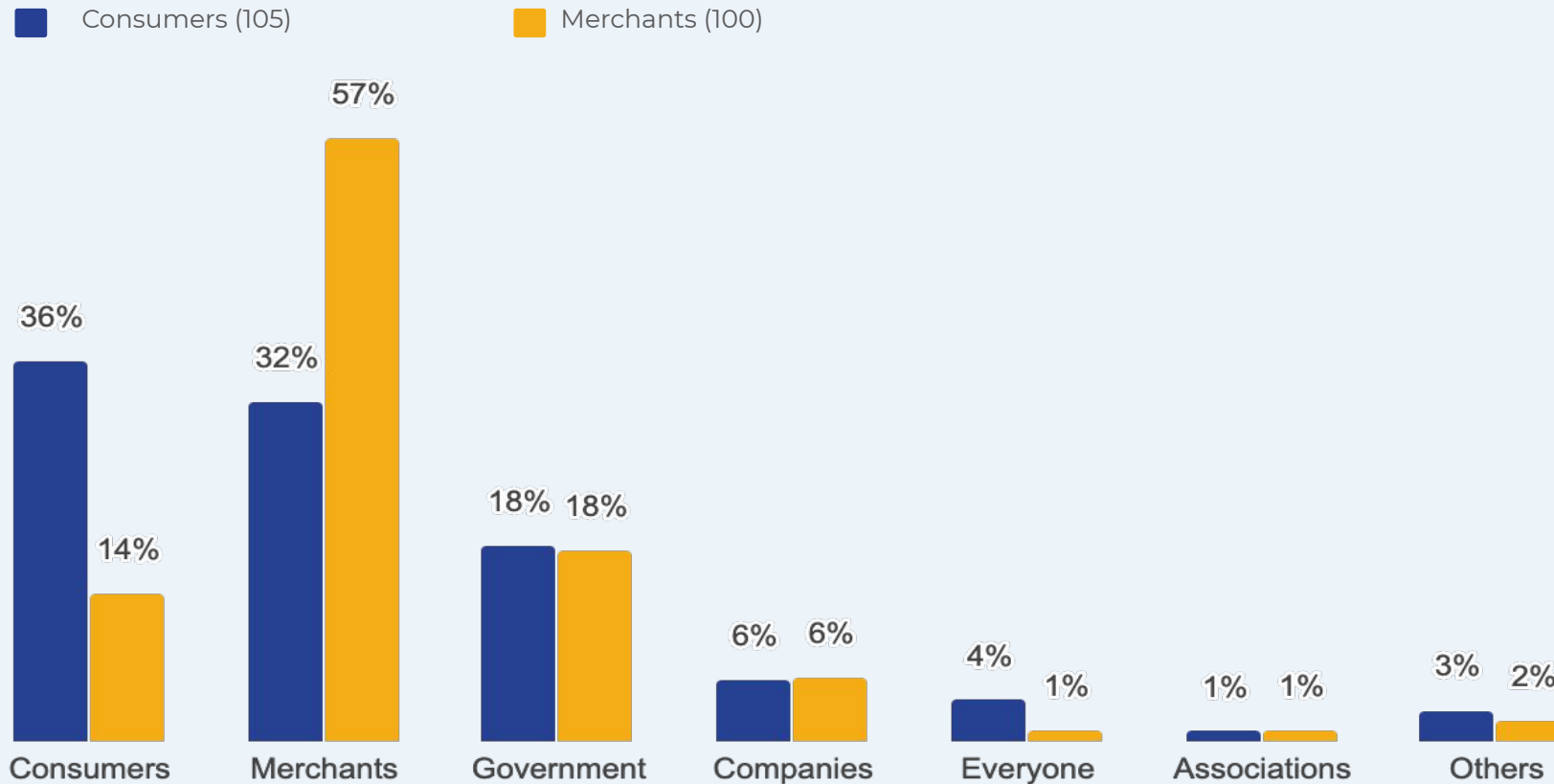
41% of merchants think that their turnover will be weakened by the "Plastic Law"



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? Who do you think has to adapt the most to this law? (Multiple answers possible)



36% of consumers also think they are the ones who must adapt the most.

These responses reflect a **sense of individual responsibility, but also an unevenly shared "burden" or sense of responsibility.**

57% of merchants think they are the ones who have to adapt most to the changes

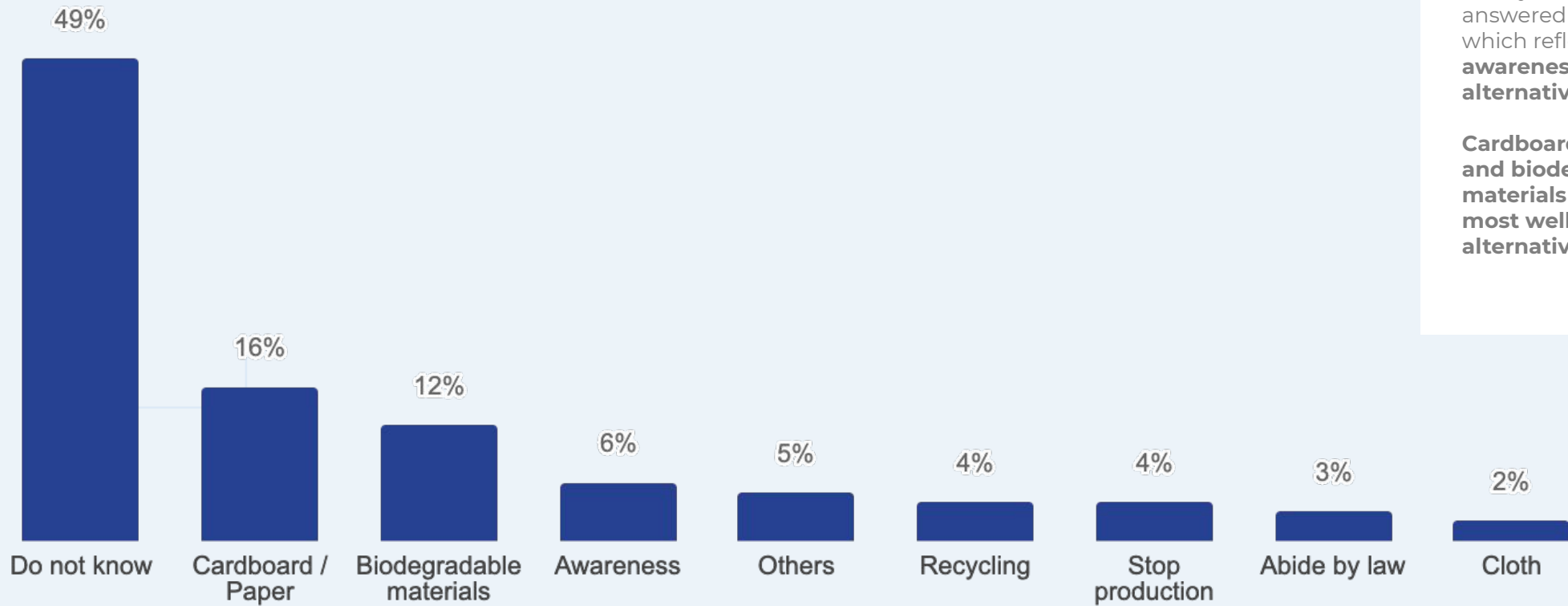


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? In your opinion, what are the best alternatives to plastic?

Consumers (105)



Nearly one in two people answered "I don't know" which reflects a **lack of awareness of existing alternatives to plastic.**

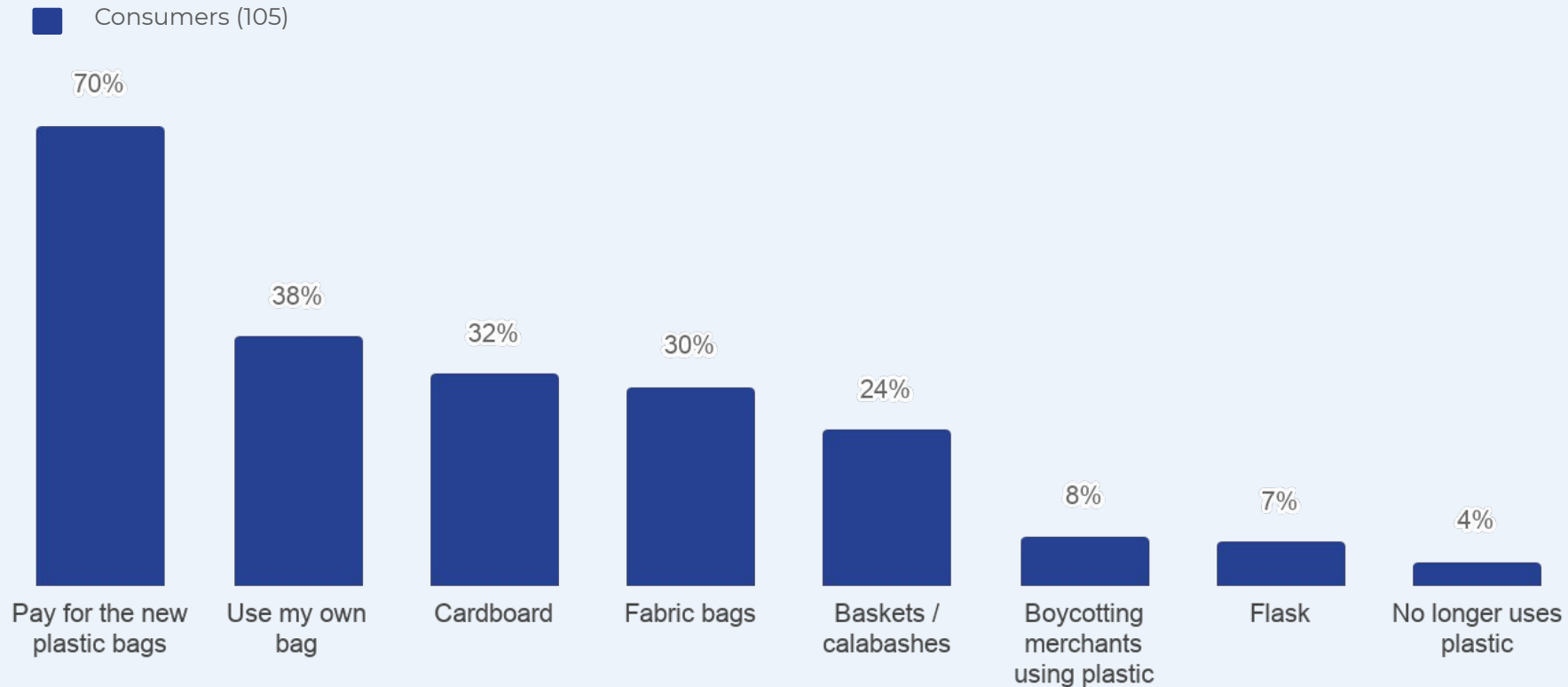
Cardboard/paper (16%) and biodegradable materials (12%) are the most well known alternatives.

| 49% do not know of an alternative to plastic



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? How do you plan to adapt? (Multiple answers possible)



“It all depends on the consumers, their consumption dictates how companies act.”

“It is not enough just to put up garbage cans for the 'Plastic law' to be enforced.”

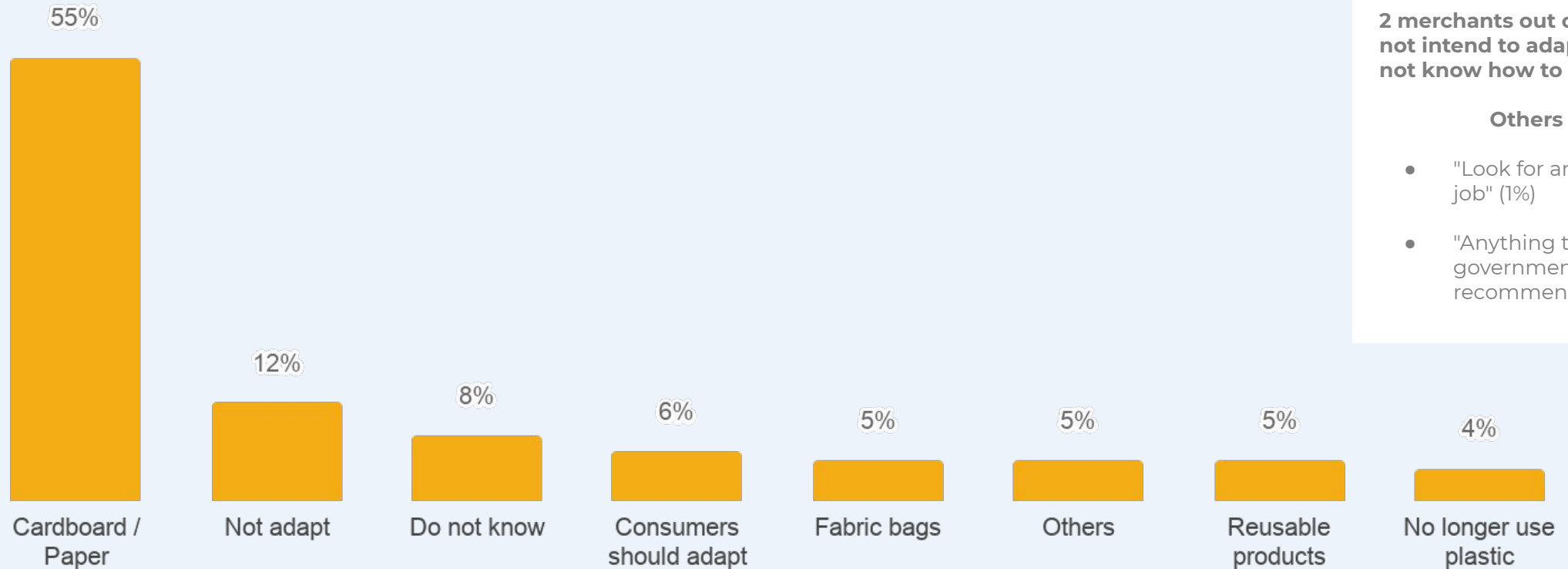
70% of consumers intend to adapt by paying for the new authorized bags

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? How do you plan to adapt? (Multiple answers possible)

Merchants (100)



2 merchants out of 10 do not intend to adapt, or do not know how to adapt.

Others

- "Look for another job" (1%)
- "Anything the government will recommend" (1%)

55% of merchants plan to adapt by using paper & cardboard as an alternative to plastic





? **Merchants:** Alternatives? Your solutions to plastic?

The answers **vary significantly** from one merchant to another, depending on the nature of their business.

“ **Dissuade the consumers to use plastic.** ”

“ **Use materials like paper, cloth, glass.** ”

“ **That the government finds jobs for us water sachets merchants.** ”

“ **Raise awareness and invite people not to throw on the ground.** ”

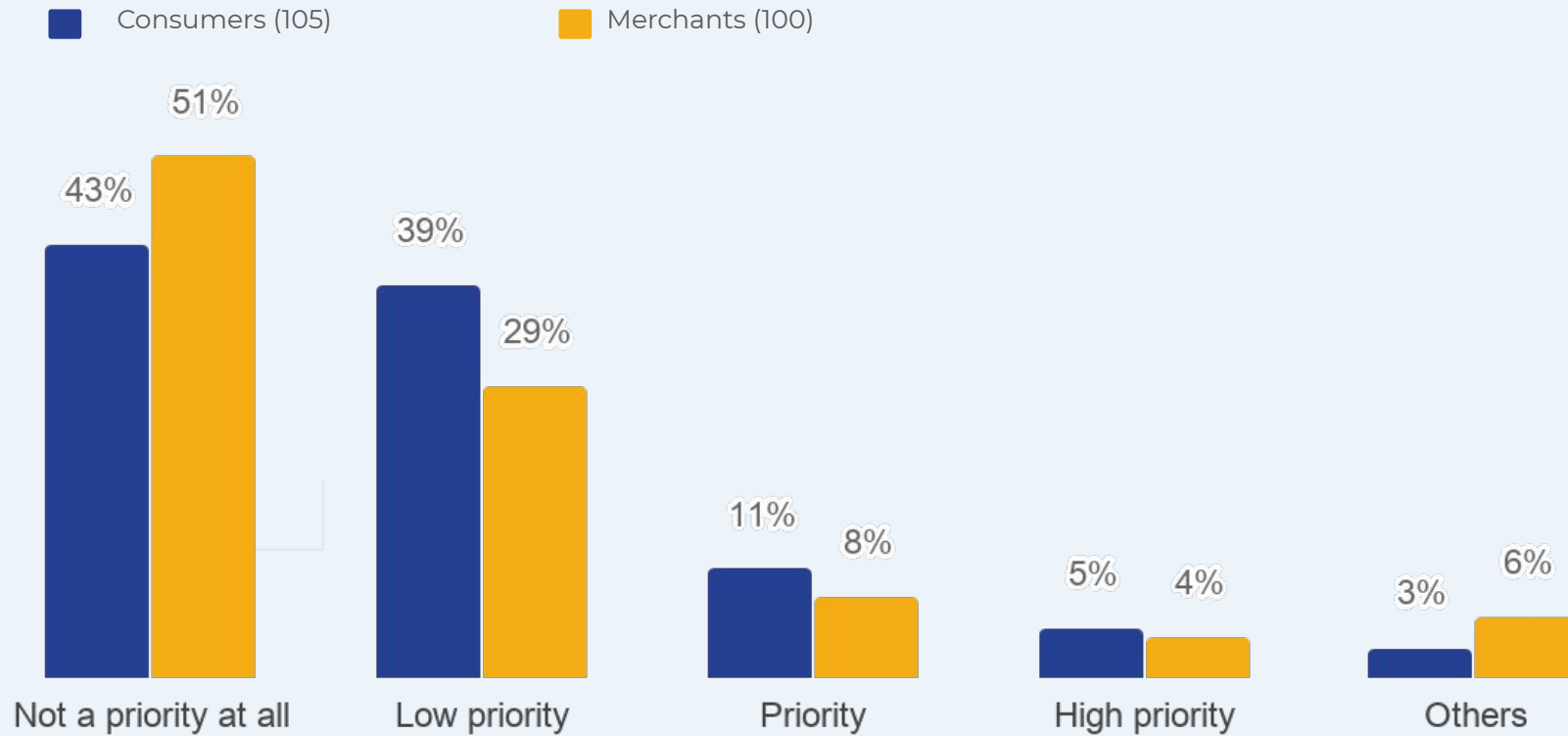


The “Plastic law” in the COVID-19 context



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? In the COVID-19 context, do you think that the "Plastic law" is a priority?



"Let's put all efforts against the coronavirus before we talk about anything else."

"We can take advantage of this period of COVID-19 to stop plastic once and for all."

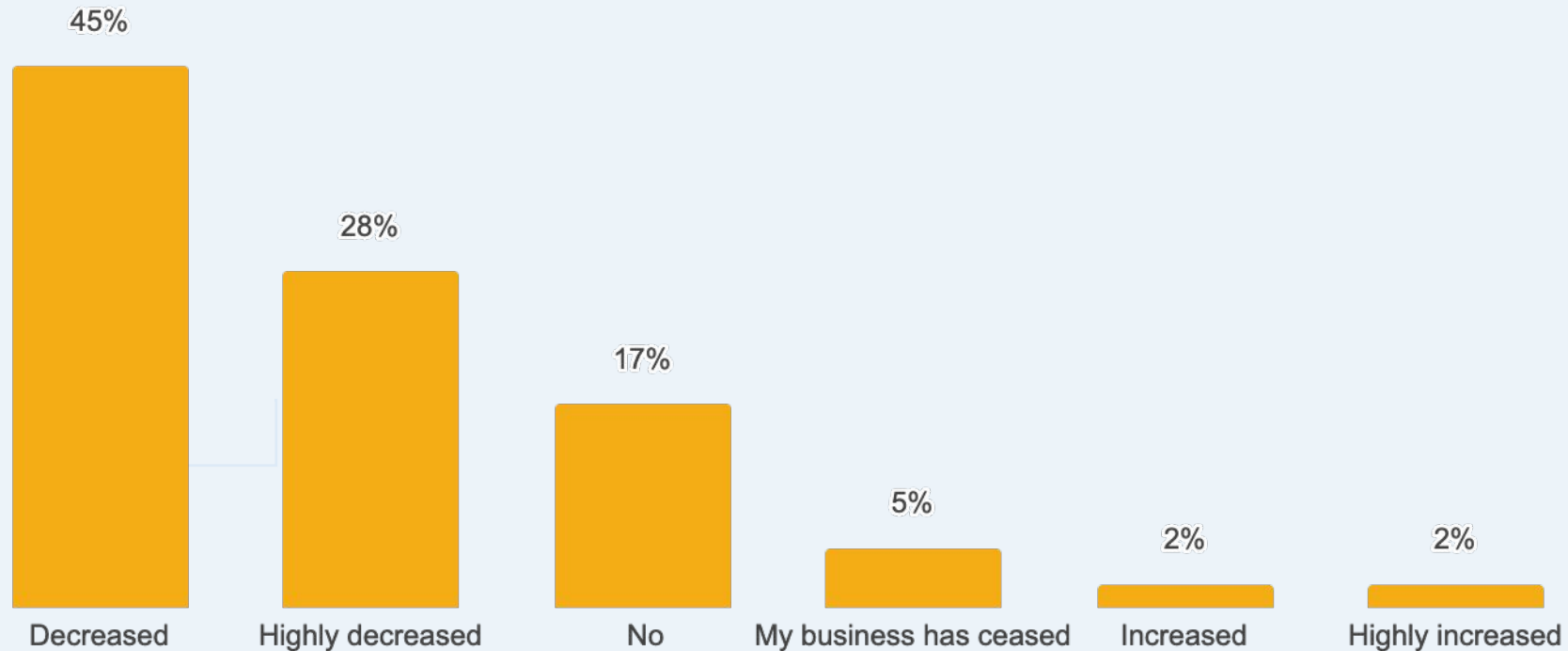
In total, 81% think that the "Plastic law" is not or a low priority in the context of the COVID-19

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? Has the COVID-19 context impacted your turnover?

Merchants (101)



5% have had to cease their activity.

The current economic context could be a major obstacle to the adherence of the "Plastic law".

But for **4%** their activity **has increased** or greatly increased:

- Water sachets merchants
- Touba coffee merchants
- Fruits and vegetables merchants

| *73% of merchants recorded a drop in their turnover with the COVID-19*



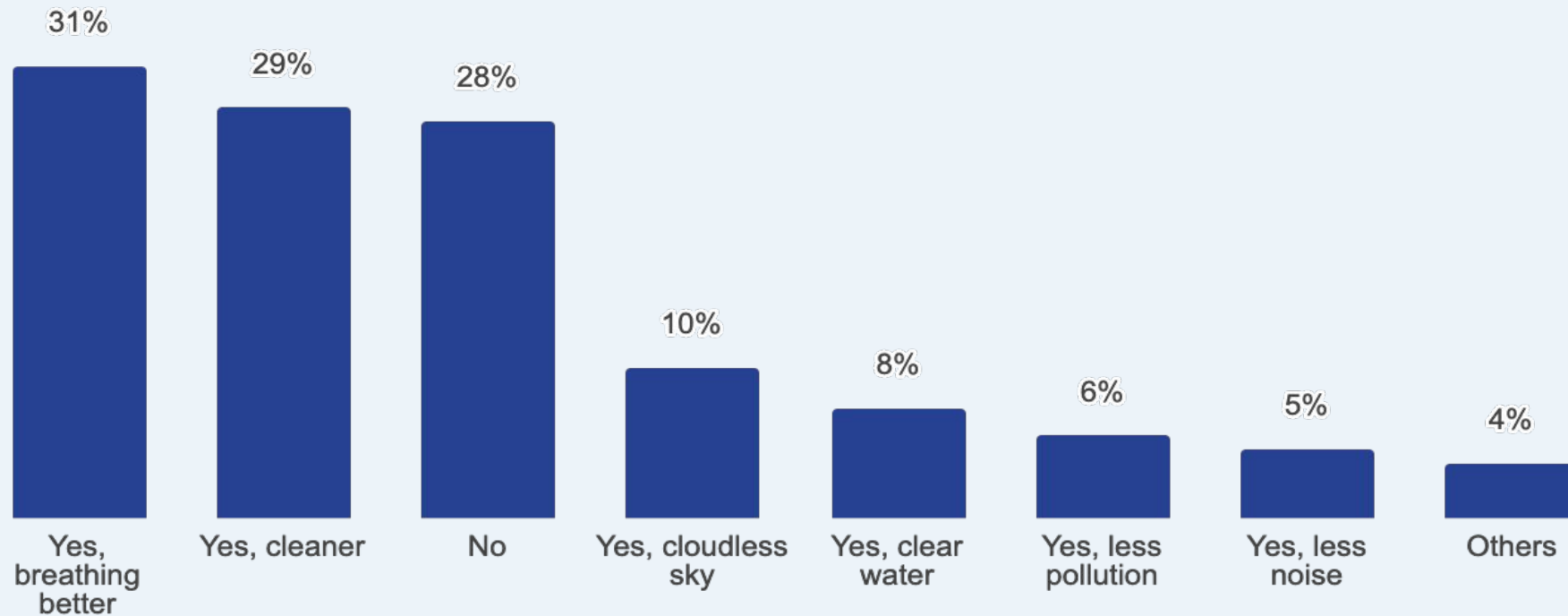
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Have you noticed changes in the environment currently?
(Multiple answers possible)



Consumers (105)



To be put **in perspective with the COVID-19 context**: less traffic on the streets, less transport on the road, less noise and olfactory pollution.

| 72% are noticing positive changes in the current environment



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❓ If you noticed any changes, would you want them to last? *(Optional question)*

■ Consumers (105)



| 92% of consumers want these changes to last



The **3% of NOs** can be explained by a link between “current changes” and the COVID-19.

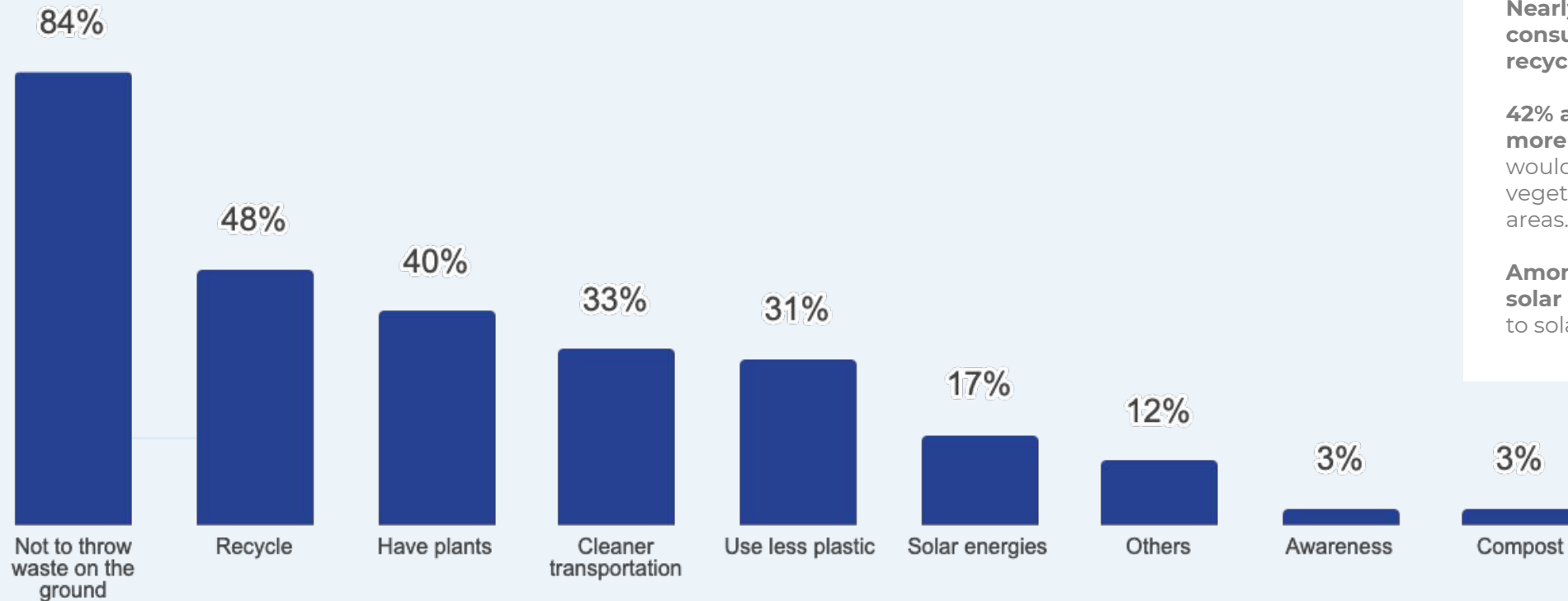


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? If so, what efforts are you willing to make for the environment? *(Multiple answers possible)*

■ Consumers (101)



Nearly one out of two consumers is willing to recycle.

42% are willing to have more plants, which would result in more vegetation in urban areas.

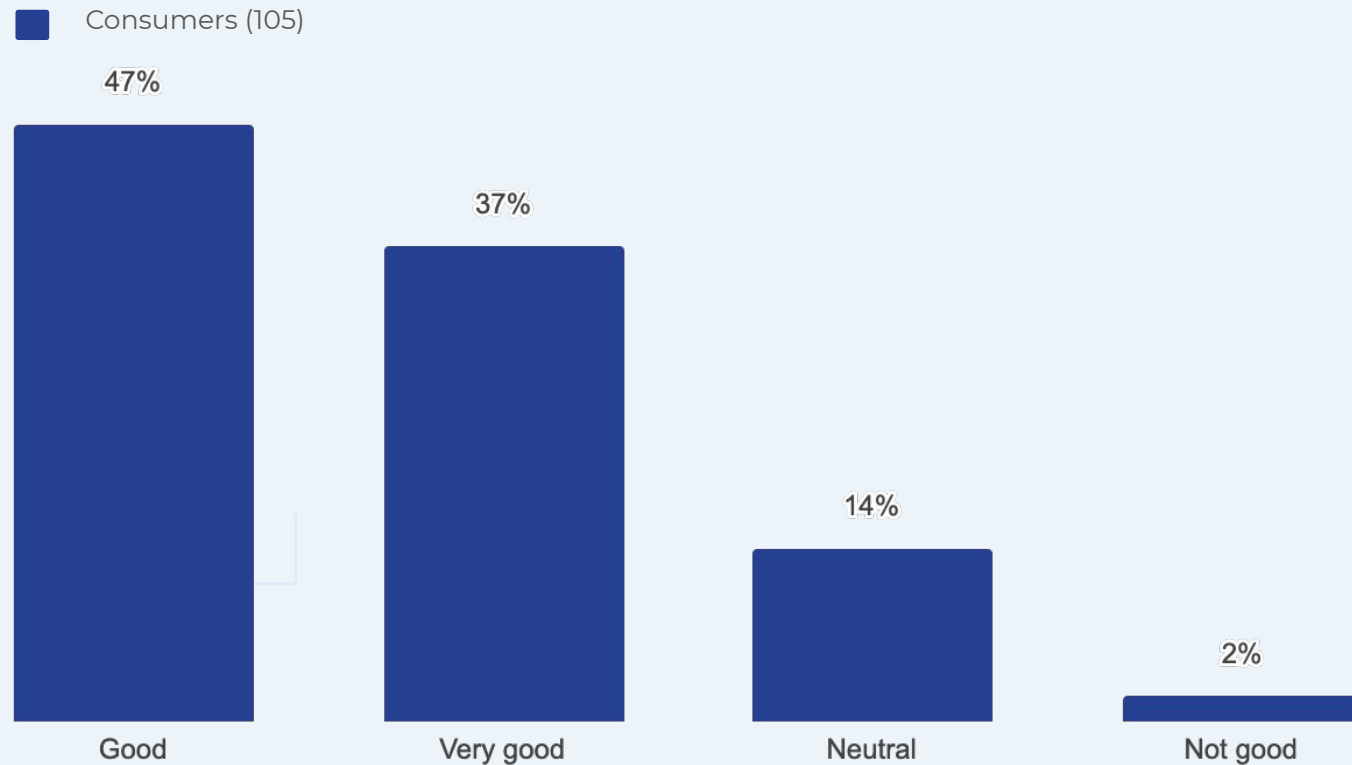
Among the 17% citing solar energy, many refer to solar kits.

| 84% of consumers are willing to not throw their waste on the ground



“Plastic Law”: Perceptions and Expectations in Dakar

How did you feel during the interview?



| 84% felt well or very well during the interview



This question is **inherent to all LOOKA studies**, in order to take into account the well-being of the respondents and to continuously **improve our methodology**.



“Plastic Law”: Perceptions and Expectations in Dakar

? **Merchants:** Any comments? Something to add?

**“ I think that
plastic is essential. “**

**“ The government and businesses must
find alternatives together. ”**

**“ If the price of alternatives, such as new coffee cups,
is higher than plastic, it’ll jeopardize my turnover. ”**

**“ It is going to be the same as the 2015 law,
it is not really going to be enforced. ”**



? **Consumers:** Any comments? Something to add?

**“ We need to support the government
in this fight for our own good. ”**

**“ It is important to give plastic producers
time to find alternatives. ”**

**“ This study has allowed me to
be more aware of the environment. ”**

“ Let’s put garbage cans on the streets. ”



Strategic Orientations



| Strategic Orientations & ideas for initiatives



COMMUNICATION ADAPTED TO THE COVID-19 CONTEXT

In total, **77%** of respondents have heard of the law (p. 13), although some confuse it with the one from 2015. The best known element, for **64%**, is the ban on single-use plastics (p. 15).

However, the "Plastic law" is implemented in difficult times due to COVID-19, and **81%** do not consider this law to be a priority (p. 23). **A communication adapted to the current situation would clearly distinguish between the two laws and highlight a possible synergy between health measures undertaken in the COVID-19 context, as well as the fight against plastic and waste.**

The choice of communication means is key depending on the targets — **42%** of merchants heard about the law by word of mouth, **37%** of consumers by TV and **26%** by social networks (p. 14).



CROWDSOURCING PLATFORM FOR ALTERNATIVES TO PLASTIC

For **80%** of merchants, the use of plastic in their business is important or very important, but **81%** do not recycle (p. 10-11). Many are not aware of alternatives to plastic, including **49%** of consumers (p. 18).

In light of economic tensions, it seems important to direct upstream action towards producers who are able to offer alternatives to plastic.

Similarly to masks against COVID-19 produced by tailors, local initiatives should be considered for waste reduction, as a source of revenue, or in the production of reusable cloth bags and baskets/calabashes — respectively **30%** and **24%** of consumers mention these alternatives (p. 19).



| Strategic Orientations & ideas for initiatives



"GREEN MERCHANT" INITIATIVES

The "Plastics law" is raising fears amongst merchants, particularly with regards to their turnover — **41%** fear that it will be weakened (p. 16) while **73%** have already recorded a drop in sales due to COVID-19 and **5%** have had to cease their activity (p. 24).

However, for **4%** of merchants, turnover has increased in the current context (p. 24) and **4%** no longer use plastic (p. 19). It would seem beneficial to direct the recovery and support strategy towards green and environmental initiatives.

A "Green merchant" label, also feasible on an online sales platform, is one option amongst others that could encourage merchants to comply with the law and offer the possibility for consumers to support them financially.



WHAT IS THE LINK MADE BY THE POPULATION BETWEEN HEALTH AND THE ENVIRONMENT (pre and post-COVID-19)?

Among consumers and merchants, most say they are engaging in actions for the environment, and **more than a third** say they are doing so through raising awareness or neighborhood clean-ups (p. 7). Waste is considered to be the main source of pollution for **30%** (p. 8). And **84%** say they are willing to stop throwing waste on the ground as the primary effort for a better environment (p. 27).

72% of consumers notice positive changes in the current environment, with **31%** even mentioning a benefit to their health: they breathe better (p. 25). **This enthusiasm can serve as a springboard to embed some of the new behaviors related to COVID-19 in the long term. A particular emphasis can be put on the link between better waste management and health.**



Conclusion

This quantitative study sheds light on perceptions and expectations raised by the "Plastic law" which came into force on 20 April 2020 in Dakar. Out of the 206 respondents, 77% are aware of the law, although there is some confusion about its content. The study also reveals concerns about possible alternatives to plastic.

On the merchants' side, the results show a high use of plastic, a low level of recycling and a drop of their turnover due to the COVID-19. For their part, consumers identify waste and cars as "the main sources of pollution". The majority intend to pay for the new permitted bags, and they are willing to make efforts, such as no longer throwing waste on the ground and recycling, to upkeep the positive changes they've noticed in their current environment.

Among both consumers and merchants, the majority say they already engage in actions for the environment, and more than a third say they are doing so by raising awareness or through neighborhood clean-ups. The priority expressed is to stop throwing waste on the ground, and the "Plastic law" does not seem to be a priority for them in the COVID-19 context.

In partnership with the Association Zero Waste Senegal, we hope that these insights and strategic orientations can serve as a silver lining for the implementation of the "Plastic law" and sustainable waste management in Senegal.





The Association Zero Waste Senegal campaigns to raise awareness against massive waste production and to propose sanitary and environmental solutions.

In its approach, the association relies on the **5 "R's"**, namely refuse, reduce, reuse, recycle and return (give back) to the earth. In the Senegalese context, it also supports a more responsible and sustainable management of waste that cannot be avoided.

Website: <https://zerowastesenegal.org/>



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Launched in 2019, LOOKA is a Market Research Service for Africa, created by the design agency YUX.

With its network of local surveyors trained in research and its advanced technology, LOOKA works on studies for large companies, SMEs and associations. By publishing its studies, LOOKA aims to make reliable data and analysis accessible to all.

Website: <https://getlooka.com/>