

Engaging Early Consumers: How BYD Leads EV Diffusion in Indonesia

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ABSTRACT

The electric vehicle (EV) market in Indonesia is experiencing rapid growth, with early adopters playing a pivotal role in its expansion. This study analyzes the digital marketing strategies of BYD and Wuling, two prominent EV brands, focusing on their Instagram content to understand how they target early consumer segments. Using the Diffusion of Innovation Theory as a framework, the study categorizes Instagram content into six main categories, with a deeper analysis of Product Information subcategories. Findings reveal that BYD emphasizes technological innovation, futuristic design, and comfort, aligning well with early adopters' preferences. In contrast, Wuling focuses on comfort and consumer interaction, appealing to a broader audience. The chi-square analysis confirms significant differences in content distribution between the two brands. These results highlight BYD's strategic alignment with early consumer needs as a key factor in its market leadership. Future research should explore other platforms and consumer responses to optimize EV marketing strategies. This study is limited to Instagram content, and future research should include other social media platforms and consumer interviews for a broader perspective. The study contributes theoretically by advancing the application of diffusion of innovations theory in digital communication and offers practical insights for companies.

KEYWORDS:
diffusion of innovations theory; digital marketing communication; electric vehicles; content analysis

INTRODUCTION

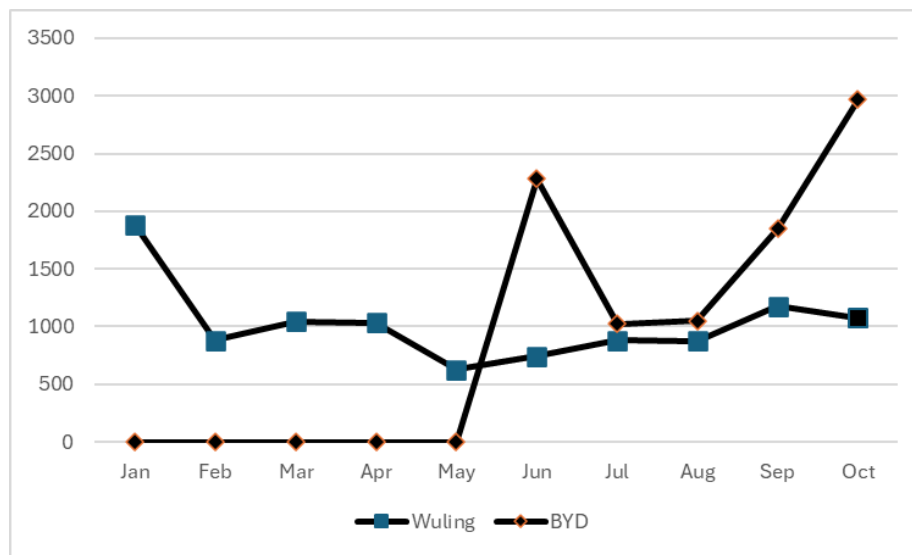
The electric vehicle (EV) market in Indonesia continues to experience significant growth (Kontan, 2024). According to Gaikindo, sales have steadily increased year-on-year, with the annual growth rate in 2024 reaching an impressive 177.32 percent YoY—a remarkable improvement compared to the same period in 2023. This growth has been driven by the introduction of various new brands and models, coupled with strong government support. Initiatives such as reduced taxes and the expansion of charging infrastructure by PLN have encouraged global brands to compete in this promising market. Among these brands, BYD and Wuling, two prominent players from China, have emerged as key competitors with distinct strategies for attracting early adopters in Indonesia.

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Wuling entered the Indonesian EV market in 2022 with the launch of the Wuling Air EV (Wuling Tech Team, 2023), generating significant initial momentum. However, nearly two years later, Wuling's sales have shown signs of stagnation, as illustrated in Figure 1. In contrast, BYD, which only entered the Indonesian market in 2024 (CNN Indonesia, 2024), has demonstrated rapid growth. According to wholesale sales data from Gaikindo, BYD's average monthly sales from January to October 2024 have surpassed those of Wuling. This raises important questions about the factors that have enabled BYD to compete so effectively as a newcomer to the market.

Figure 1. Trends in wholesale sales of Wuling and BYD electric vehicles in Indonesia



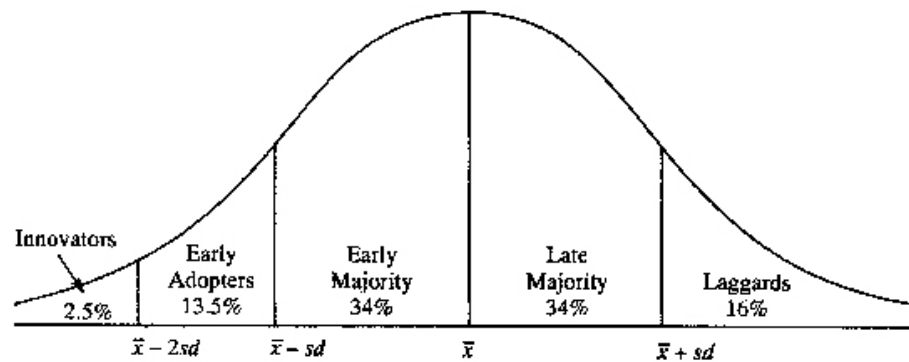
Source: Processed by the researcher based on Gaikindo data (2024)

Rogers (2003) identifies four key elements in the diffusion process: innovation, communication channels, time, and social systems. Innovation is defined as an idea, practice, or object perceived as new by an individual or group. It is evaluated based on five main characteristics: relative advantage, compatibility, complexity, trialability, and observability. Communication channels refer to the mediums through which information about the innovation is disseminated, which can include both interpersonal communication and mass communication methods.

The theory also categorizes innovation adopters into five distinct groups: innovators (2.5% of the population), early adopters (13.5%), early majority (34%), late majority (34%), and laggards (16%). Innovators are risk-takers who often have the resources and willingness to experiment with new ideas. Early adopters, as influential figures within their communities, play a critical role in introducing innovations through social influence. The early majority are more cautious, requiring concrete evidence of the innovation's value before adopting it. The late majority are typically sceptical, adopting innovations only after

the majority of people have embraced them. Finally, laggards are highly conservative and resistant to change, adopting innovations only when absolutely necessary.

Figure 2. Stages and percentages of adopters according to the Diffusion of Innovation Theory



Source: Rogers (2003)

Early consumers (innovators and early adopters) exhibit specific characteristics. Innovators are highly enthusiastic about new technologies (Rogers, 2003), willing to take significant risks, and possess adequate financial resources (Hardman et al., 2016). They are particularly attracted to innovative features, such as advanced technology and futuristic design. Early adopters, by contrast, are opinion leaders with substantial social influence within their communities (Rogers, 2003). Their purchasing decisions are often influenced by factors such as social image and brand credibility (Hardman et al., 2016). Additionally, attributes such as charging convenience, spacious cabin interiors, and responsive vehicle handling are especially appealing to early adopters (Schuitema et al., 2013).

The rise of various social media platforms has created multiple options for interaction, with Instagram being particularly favored by marketers. Unlike platforms such as Facebook, Twitter, and Pinterest, which were originally web-based and later adapted for mobile use, Instagram was designed specifically for mobile devices. This mobile-first design offers distinct advantages, as noted by Miles (2019): (1) Instagram performs exceptionally well on mobile devices, being fundamentally a mobile application. (2) It is a lightweight platform, as it is not primarily conversation-based. (3) Instagram content has a longer lifespan and can be preserved for extended periods, making it a valuable tool for marketers.

Rohadian and Amir (2019) emphasize that content engagement plays a crucial role in implementing the customer engagement concept. This involves creating relevant and appealing content tailored to the target audience, fostering a sense of community, and establishing a meaningful connection with potential consumers. To make marketing strategies more attractive, the message content should be compelling, utilizing visual and audio elements to reach a broad audience. Creative use of elements such as color, contrast,

sharpness, and feed layout can effectively capture the attention of potential buyers, while also stimulating emotional responses.

Electric vehicle (EV) sales currently account for over 4% of total car sales in Indonesia. This indicates that EVs are still in the early stages of diffusion within the country—a phase theoretically described by Everett Rogers (2003). Accordingly, EV adopters in Indonesia can be categorized as innovators or early adopters. Several studies have applied the diffusion of innovation theory to explore factors influencing EV adoption. For example, Xia et al. (2022) examined these factors in China, Arora et al. (2022) identified key attributes influencing adoption in India, and Zhuge et al. (2021) highlighted the impact of technological innovation on EV adoption in Beijing.

Although the diffusion of innovation theory is widely used to discuss EV adoption, there is limited research on Instagram content strategies targeting early EV consumers in Indonesia. In this context, analyzing the Instagram content of BYD and Wuling offers valuable insights into how these two brands use digital platforms to attract early consumers in the Indonesian EV market. Considering the importance of consumer engagement in appealing to early adopters, studying Instagram content is a practical approach for understanding the digital marketing strategies employed by BYD and Wuling.

This study aims to analyze how BYD and Wuling utilize Instagram posts to target early consumers in the Indonesian EV market. The research questions are: (1) What are the differences in digital marketing communication strategies used by BYD and Wuling in Indonesia? (2) How do BYD's and Wuling's Instagram posts align with the preferences of the early consumer segment (innovators and early adopters) to effectively capture their attention?

Practically, the findings of this study are expected to guide BYD, Wuling, and other brands in designing effective digital communication strategies to attract early consumers in the EV market. Theoretically, this research contributes to the literature on digital marketing communication, particularly in the context of innovation diffusion and digital strategies within the Indonesian market.

METHOD

This study employs a qualitative methodology to analyze and descriptively examine the content of Instagram posts from the official accounts of BYD and Wuling Indonesia, focusing on the product information they present. Primary data were collected through coding of Instagram posts from the official accounts of these brands in Indonesia. A total of 340 posts were obtained from the @byd_indonesia account and 344 posts from the @wulingmotorsid account, covering the period of early January to mid-November 2024. This time frame was chosen considering that BYD began actively introducing its products in Indonesia in early January, while the study was conducted in the third week of November 2024.

The coding process began with reading the posts and reviewing the accompanying images/videos on the Instagram accounts for comparison. The researcher then inductively developed an initial coding framework for the Instagram content of Wuling Indonesia. This was followed by an evaluation of the initial coding, with adjustments or the addition of new codes made to ensure relevance. Throughout this process, the researcher utilized NVIVO 15 software. Five main categories of post content were established: (1) Company Information, (2) Product Information, (3) Interaction, (4) Public Services, (5) Promotions, and (6) Reviews & Testimonials. More specific subcategories were then defined for each main category. The same coding framework was subsequently applied to the Instagram content of BYD Indonesia.

Table 1. List of Codes and Subcodes

Category	Subcategory	
Company Information	Media event	Announcement
	Partnerships	
Product Information	Battery and charging speed	Design features
	Safety features	Comfort features
	Performance features	Technology features
	Price advantage and efficiency	Range
	Product launch	Eco-friendliness
	General	
Interactions	Community	Visitors interaction
	Quizzes	
Public Services	Environmental campaigns	Greetings
Promotions	Exhibitions	Sales promotions
Reviews & Testimonials	Testimonials	Media reviews

Source: Processed by researcher (2024)

To ensure data validity and accuracy, this study employs source triangulation, cross-referencing observational data with findings from the literature review. The coded data were

then analyzed using a chi-square test to evaluate whether there are significant differences in the distribution of category code of the Instagram posts of BYD and Wuling Indonesia.

RESULTS AND DISCUSSION

Results

The researcher analyzed information communicated through the Instagram posts of BYD and Wuling Indonesia accounts. The analyzed information includes product information, company information, interaction, public services, promotions, reviews, and testimonials. The coding process produced results as presented in Table 1 and Table 2. For the first analysis, as shown in Table 1, the researcher conducted an analysis of content categories on a broader scale. In the second analysis (Table 2), the researcher focused on subcategories of content within the Product Information category.

Table 1. Frequency of content category code in Instagram posts of BYD and Wuling Indonesia

Content category	BYD	Wuling
Company Information	53	54
Product Information	293	214
Interaction	6	34
Public Services	8	10
Promotions	95	87
Reviews & Testimonials	28	43

Source: Processed by researcher (2024)

The chi-square analysis of the frequency distribution presented in Table 1 yielded a chi-square value of 33.91 with 5 degrees of freedom and a p-value of 2.47989E-06. This indicates that there is a significant difference in the distribution of frequency data across content categories posted on the Instagram accounts of BYD and Wuling Indonesia.

Table 2. Frequency of Product Information elements in Instagram posts of BYD and Wuling Indonesia

Product Information Subcategory	BYD	Wuling
Battery and charging speed	4	11
Design features	70	22
Safety features	15	11
Comfort features	66	85
Performance features	28	2
Technology features	57	17
Range	3	4
Price advantage & efficiency	0	6
Product launch	6	6
Eco-friendliness	35	32
General	9	18

Source: Processed by researcher (2024)

The analysis of the distribution of elements within the Product Information category on the Instagram accounts of BYD and Wuling revealed significant differences in the digital communication strategies of the two brands. Based on the chi-square test, a chi-square value of 74.24 with 10 degrees of freedom was obtained. The results indicate that the distribution of Product Information elements is not uniform, with a very small p-value of 6.68338E-12.

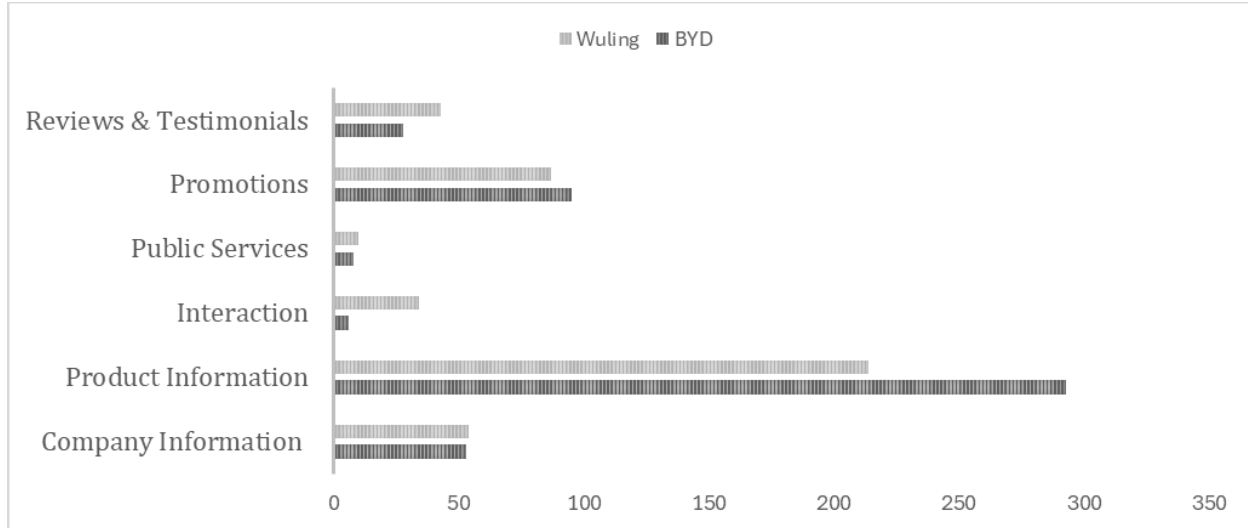
Digital Marketing Communication Strategies of BYD and Wuling Indonesia

Electric vehicle (EV) marketers need effective communication strategies to capture the attention of early consumers. The Diffusion of Innovation Theory provides a valuable framework for understanding how innovations, such as EVs, are accepted and adopted by different categories of adopters. This theory defines diffusion as the process through which an innovation is communicated to members of a community via specific channels over time, eventually leading to its adoption by individuals or groups. Social media, as a key communication channel, plays a crucial role in delivering relevant marketing messages to target audiences.

Social media content has a significant impact on consumer behavior in the adoption of EVs (Dormanesh et al., 2020). Among various platforms, Instagram stands out as

particularly relevant due to its capacity to foster consumer engagement and drive sales conversions, as highlighted by Thomas and Verma (2023). Zhou (2023), in a study of BYD's marketing strategies in Malaysia, found that targeted campaigns, innovative approaches, and fostering positive customer awareness enabled BYD to overcome challenges and capitalize on opportunities in the Malaysian market. These findings underscore the importance of strategic social media use in driving the adoption of new technologies like EVs.

Figure 3. Visualization of code frequency in Instagram posts of BYD and Wuling Indonesia



Source: Processed by researcher (2024)

As illustrated in Figure 3, both brands generally maintain a balanced approach in highlighting company information, public services, and promotions. However, notable differences emerge in their focus on product information, interaction, and reviews & testimonials.

BYD prominently features product information on its Instagram account but places less emphasis on interaction and reviews & testimonials. This approach may stem from BYD's confidence in its products, which it expects to serve as the main attraction for the brand. While interaction, media reviews, and user testimonials are present, their frequency is relatively lower.

In contrast, Wuling, while also emphasizing product information, does so at a lower frequency compared to BYD. Instead, Wuling focuses more on elements of interaction, media reviews, and testimonials. Observations of posts on Wuling Indonesia's Instagram account reveal initiatives encouraging users to share testimonials. Wuling also involves some users as ambassadors (referred to as "icons") and actively engages its audience through quizzes and competitions. These interactive and testimonial-driven strategies suggest that Wuling aims to target a broader consumer base rather than exclusively focusing on early adopters.

Based on the content strategies displayed on both brands' Instagram accounts, it can be inferred that BYD emphasizes product information to demonstrate the superiority of its

products. Conversely, Wuling seeks to engage a wider audience by integrating itself into consumers' everyday lives, showcasing electric vehicles as an accessible and relatable part of daily routines.

Alignment of Instagram Content with Early Consumer Segments

To successfully capture early consumers, creating intensive awareness around the electric vehicle (EV) segment is essential (Bryła et al., 2022). Previous research highlights that the adoption of electric vehicles often begins with innovators and early adopters. These groups play a critical role in influencing the majority within the social system, thus driving the diffusion of innovation (Hardman et al., 2016). External factors such as government policy support, infrastructure development, and increased environmental awareness also significantly accelerate the adoption process (Schuitema et al., 2013). These factors help create a supportive ecosystem that reduces barriers for early consumers and facilitates broader market penetration.

At the initial stages of adoption, innovators and early adopters dominate. Innovators, characterized by their enthusiasm for new technologies and willingness to take risks, are often the first to embrace innovations. Early adopters, while more critical and selective, play a pivotal role in accelerating innovation diffusion through their social influence and ability to validate the innovation's value to others. As such, the behaviors and preferences of these groups are pivotal in determining the success of an EV product or innovation in achieving mass market adoption.

Tailoring messages to resonate with these early consumer segments is crucial for effective communication (Rohadian & Amir, 2019). According to the Diffusion of Innovation Theory, in markets like Indonesia where EV adoption is still in its early phase, marketing messages delivered via Instagram or other platforms need to align closely with the preferences and priorities of innovators and early adopters. Innovators are predominantly drawn to advanced technological features, such as cutting-edge connectivity, autonomous driving capabilities, and futuristic design. Early adopters, on the other hand, prioritize products that reflect their social image, align with sustainability values, and offer high levels of comfort.

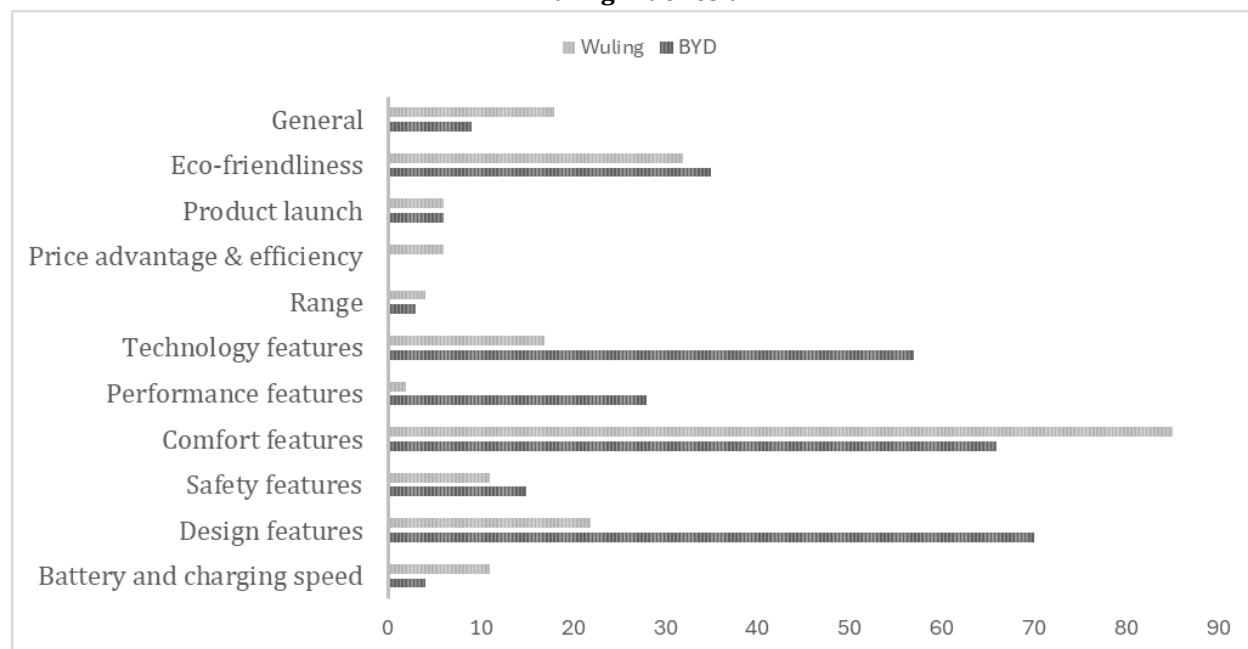
Research by Hardman et al. (2016) emphasizes that early EV consumers value features such as fast charging capabilities, extended driving range, innovative navigation and connectivity systems, and driving comfort. Similarly, Nugroho and Harjanto (2023) underline the importance of incorporating educational and literacy activities into EV marketing strategies, aiming to familiarize potential consumers with the benefits and functionalities of EVs. These strategies help build trust and reduce perceived risks, which are significant factors for early adopters.

Mazlan et al. (2024) highlight that promoting EVs as environmentally friendly transportation is a particularly effective marketing strategy. Their research indicates that environmental friendliness has the strongest influence on consumer behavior when

purchasing EVs. Therefore, marketing content that emphasizes sustainability, technological innovation, futuristic design, and comfort tends to resonate more with early consumers. By aligning marketing efforts with these priorities, brands can successfully appeal to innovators and early adopters, who not only value eco-friendly solutions but also seek cutting-edge advancements that reflect their forward-thinking mindset.

In conclusion, the key to effectively engaging early EV consumers lies in crafting targeted messages that highlight advanced technological features, futuristic aesthetics, sustainability values, and practical comfort. By addressing these priorities, marketers can foster stronger connections with early adopters and innovators, ultimately accelerating the adoption curve and paving the way for widespread market acceptance.

Figure 4. Visualization of Product Information elements' frequency in Instagram posts by BYD and Wuling Indonesia



Source: Processed by researcher (2024)

Based on the data presented in Figure 4, in the *Product Information* category, BYD places significant emphasis on *Design features* (70 occurrences), *Comfort features* (66), and *Technology features* (57). This suggests that BYD prioritizes aspects related to innovation and modernity to attract its target audience. The prominence of *Design features* as the most frequently highlighted element reflects BYD's strategic effort to appeal to consumers who value aesthetics and futuristic designs. Additionally, the strong emphasis on *Comfort features* and *Technology features* demonstrates the company's commitment to positioning its electric vehicles as both technologically advanced and comfortable, addressing key concerns of early adopters who prioritize these attributes in EVs.

In contrast, Wuling places the greatest emphasis on *Comfort features* (85 occurrences), making it the dominant element in its Instagram content. However, the second most frequent element, *Eco-friendliness*, appears only 32 times, highlighting a substantial gap. This focus on comfort suggests that Wuling's strategy is tailored towards appealing to consumers seeking practical, user-friendly vehicles for everyday use. The emphasis on *Comfort features* aligns with a more traditional automotive marketing approach, emphasizing usability and familiarity over cutting-edge innovation.

Regarding the *Eco-friendliness* element, Wuling addresses this aspect slightly less frequently than BYD. While the difference is not particularly significant, it suggests that Wuling does consider environmental sustainability but does not prioritize it as a core aspect of its messaging. Conversely, BYD completely omits the *Price advantage & efficiency* element, while Wuling includes it six times. This inclusion by Wuling indicates an effort to attract price-sensitive consumers, positioning its vehicles as offering additional value for cost-conscious buyers.

The comparison reveals distinct content strategies between the two brands. BYD's approach centres on highlighting *Design features*, *Comfort features*, and *Technology features*, emphasizing innovation, sophistication, and modernity. In contrast, Wuling's content strategy focuses predominantly on *Comfort features*, with a secondary emphasis on eco-friendliness and price considerations. When evaluated against the preferences of early consumer segments—who are typically more interested in technological advancements, futuristic design, comfort, and sustainability—BYD's content strategy appears better aligned with the expectations of this demographic.

This alignment likely contributes to BYD's superior performance in the Indonesian EV market, which is still in its early stages of adoption. By appealing to the values and preferences of early adopters and innovators, BYD positions itself as a forward-thinking leader in the industry. In contrast, Wuling's focus on comfort and price value caters to a broader audience but may not resonate as strongly with the technologically inclined and design-conscious early adopters who dominate the current market. This strategic distinction has likely played a crucial role in BYD's success, solidifying its position as the market leader in Indonesia's emerging EV sector.

CONCLUSION

The marketing communication strategies of BYD and Wuling on Instagram reflect differing approaches to capturing early consumers in Indonesia's electric vehicle (EV) market. BYD emphasizes design features, comfort, and innovative technology, aligning with the preferences of innovators and early adopters who prioritize advanced technology, futuristic design, and comfort. In contrast, Wuling focuses more on comfort and consumer interaction, which is more relevant for the mass market. The analysis indicates that BYD's strategy is

better suited to attract early consumers, who play a crucial role in the successful diffusion of innovation. This approach has supported BYD in becoming the market leader in Indonesia's EV market during the early adoption phase.

This study has several limitations that should be acknowledged. First, it focuses solely on content analysis on Instagram, meaning the findings do not reflect BYD and Wuling's communication strategies on other social media platforms. Additionally, the study does not evaluate consumer responses to the analyzed content elements, making it difficult to conclude their impact on consumer perception or engagement with certainty.

Based on these limitations, the researcher recommends conducting similar analyses on the social media content of electric vehicle manufacturers on other platforms, such as TikTok or X, to better understand the communication patterns of both brands across platforms with diverse audiences. Further studies are also suggested to evaluate the extent to which specific information elements, such as "Technology Features" or "Comfort Features," influence consumer engagement, including metrics like likes, comments, or shares. Cross-cultural research is also essential to understand how information elements are received across different regions in Indonesia, given the country's diverse demographics and consumer preferences. This would provide deeper insights into tailoring marketing strategies for a broader audience in the Indonesian EV market.

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