



# RECYCLING HABITS AND ATTITUDE IN EUROPE 2020

Delivered by Made with Insight  
For Every Can Counts & Ewing

23/09/2020

**SKIP TO**



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# CONTEXT

**Every Can Counts** (ECC) has commissioned research in Europe into people's behaviours and attitudes on recycling. This will serve to support a PR campaign designed and executed by **Ewing**.

The research was designed and analysed by **Made with Insight** using online survey data collected by **Lucid**.

This report offers a summary of the study results. ECC and Ewing have access to the full data tables (at an overall European level) for any queries.

## OBJECTIVES

- Understand and compare current recycling habits
- Assess possible impact of COVID-19 on attitudes and behaviours
- Identify any barriers and motivations to recycling more, especially in public spaces and during public events
- Assess knowledge around recycling levels, and specifically around aluminium drink cans recycling
- Understand what key messages and information around aluminium recycling may most resonate with citizens

## METHODOLOGY

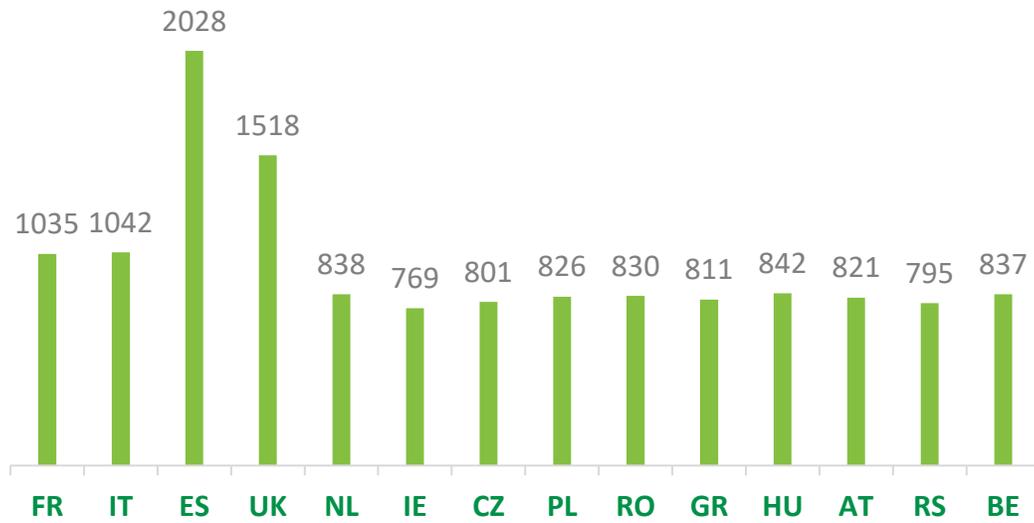
- 10 minute online survey
- Fieldwork ran from 05/08/2020 to 14/09/2020
- Sample targeted: 16+ years, balanced on gender and age group
- Scope covered 14 countries: Belgium, Serbia, Austria, Hungary, Greece, Romania, Poland, Czech Republic, Ireland, Netherlands, United Kingdom, Spain, Italy, France
- Note: the data was not weighted
- The data was analysed for statistically significant differences. Sig. test results comparing countries are not shown in this report, since not a priority objective and reduces readability of charts, but these are available in the data tables (provided separately).
- For similar reasons, detailed demographic breakdowns are not shown in the report (but available in the data tables).
- Local markets had the opportunity to customise some question statements and answer options. Whilst not present in the report these results are also available in the data tables.



# SAMPLE

13.793  
RESPONDENTS IN TOTAL

Breakdown per market as follows:



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# EXECUTIVE SUMMARY

**1. Over 9 in 10 Europeans surveyed said recycling is important, seeing it as a civic duty. The COVID-19 pandemic appears to have only reinforced these views.**

- 86% say it is more important than ever to take care of our planet, the environment and recycle.
- Despite the economic impact of the COVID-19 crisis, 52% would put the environment before the economy.

**2. Not enough is being done to encourage recycling. Though the vast majority do recycle, it is not systematic and people would like to do more themselves, but need support to do so. Making recycling clear and easy is essential.**

- Respondents feel inadequately informed: there is no consensus on packaging recycling rates; a majority are also unclear about what happens to recycling from the point of collection and would like to know more.
- Recycling rates drop when out of the home. Respondents want to see more bins everywhere they go and facilities that are closer to home.

**3. There is an expectation for companies to improve the recyclability of their packaging. Ideally it would be 100% recyclable, or biodegradable.**

- 2 in 3 respondents strongly agree that Companies should use packaging that is infinitely recyclable.
- Respondents mentioned recyclability as the main reason to prefer aluminium can packaging.



# DETAILED FINDINGS

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The detailed findings are broken down into 4 sections answering the questions:

1. How important is recycling to Europeans?
2. What are the recycling habits of Europeans?
3. What are the recycling knowledge gap and Interest in education?
4. What are the expectations for greener packaging?

# IMPORTANCE OF RECYCLING

Overall, almost all Europeans surveyed say recycling is important to them, with over a third saying it is extremely important.

- Over 9 in 10 say recycling is an obligation for all citizens and consumers, that it is urgent to properly tackle recycling and that they would like to be able to do more.
- In a COVID-19 world people say it's more important than ever to take care of the environment and recycle
  - They have done more to recycle what they could
  - The economy is not seen as more important than the environment.



# IMPORTANCE OF RECYCLING - OVERALL

Overall, 4 in 5 respondents (79%) say recycling is very or extremely important to them, with over a third (38%) saying it is extremely important. Female respondents are statistically significantly more likely to say recycling is extremely important, while Gen Z respondents are significantly less likely to see recycling as extremely important when compared to older generations.

## How important is recycling to you?

Somewhat not / not at all

Somewhat / very / extremely

**79%**

T2B: Net very / extremely important

### T2B

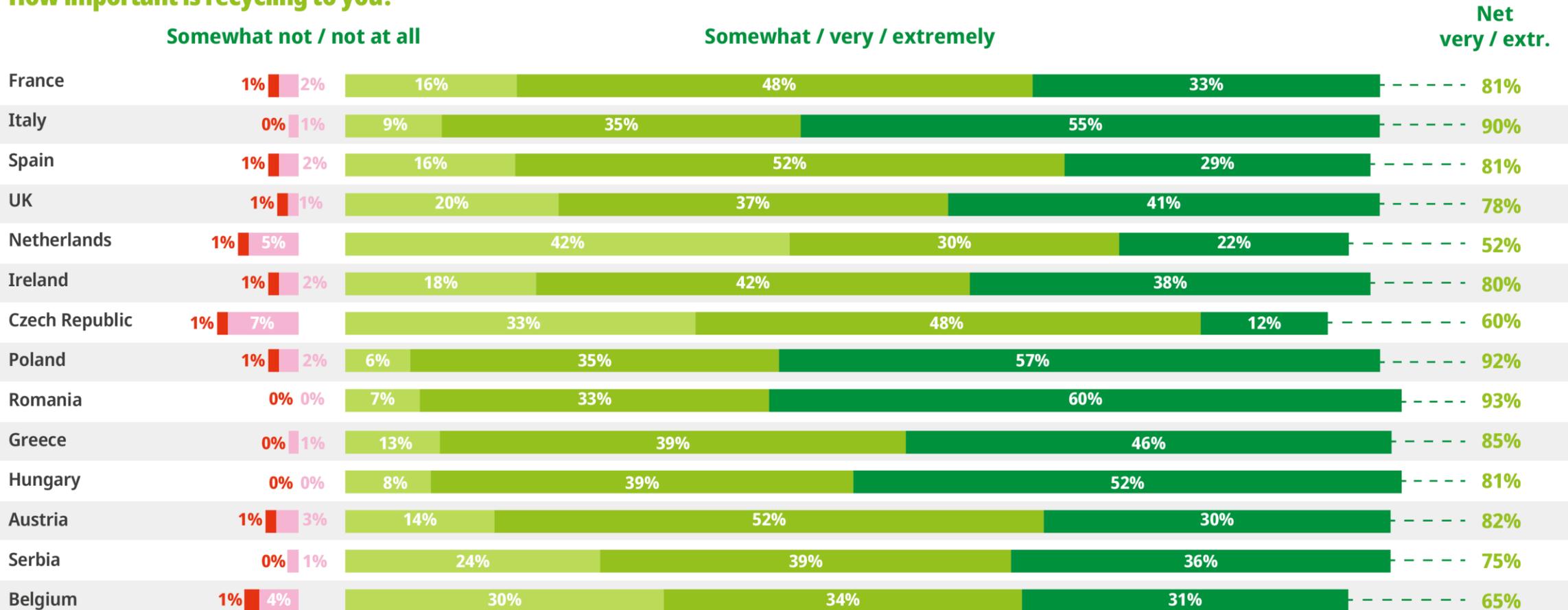
- Male 36%
- Female 40% ▲
- Gen Z 31% ▼
- Mill 38%
- Gen Y 40%
- Gen X 42%
- Silent 41%



# IMPORTANCE OF RECYCLING – BY COUNTRY

The vast majority of respondents across countries say recycling is important. However Italy, Poland, Romania and Hungary all score particularly high, with 90% or more saying it is very or extremely important, while the Netherlands score the lowest with just 52% saying the same.

## How important is recycling to you?

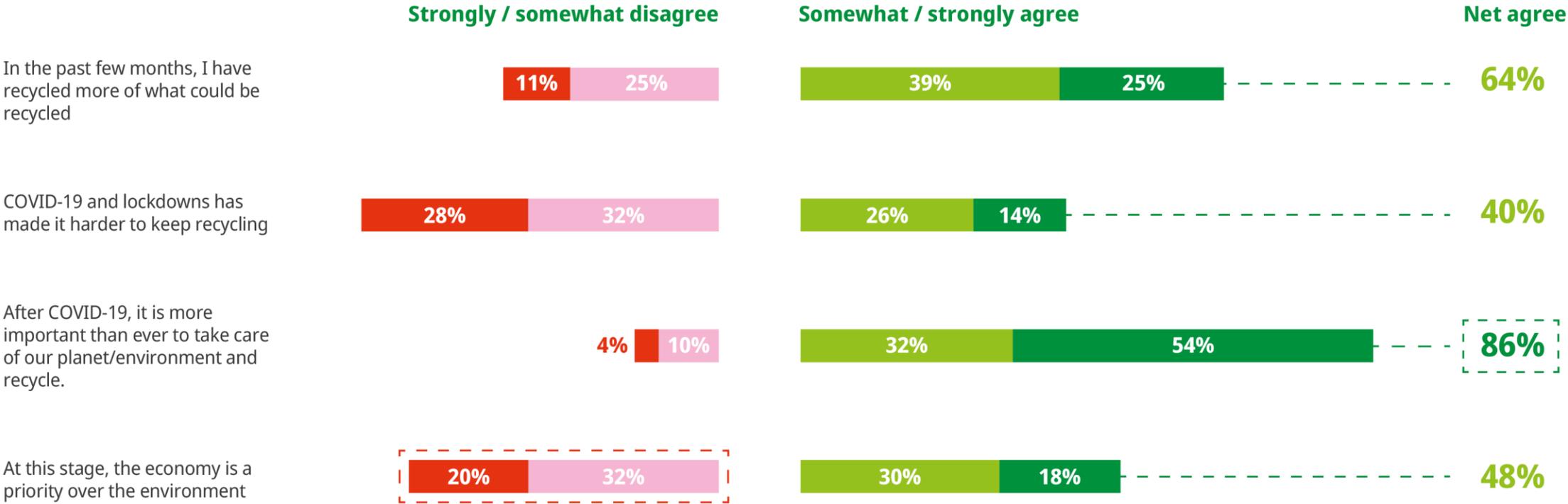


# COVID-19 IMPACT - OVERALL

A vast majority (86%) of respondents agree that after COVID-19, it's more important than ever to take care of our planet, the environment and recycle, with 52% saying that the economy is not more important than the environment.

During COVID-19, most respondents report having recycled more of what they could (64%), and that it wasn't harder than before (60%).

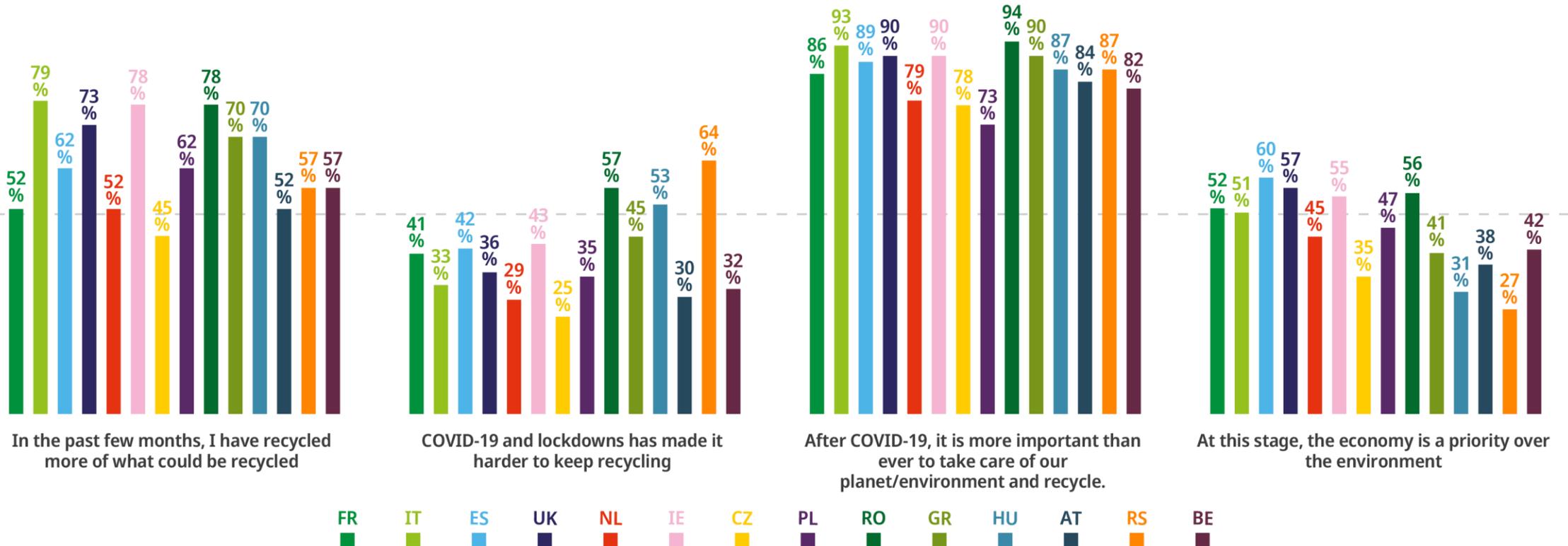
## To what extent do you agree or disagree that...



# COVID-19 IMPACT – BY COUNTRY

Respondents in Serbia and Hungary prioritise the environment over the economy the most, along with respondents in Romania they also found it particularly hard to recycle during COVID-19. Respondents in the Czech Republic under-index on all statements.

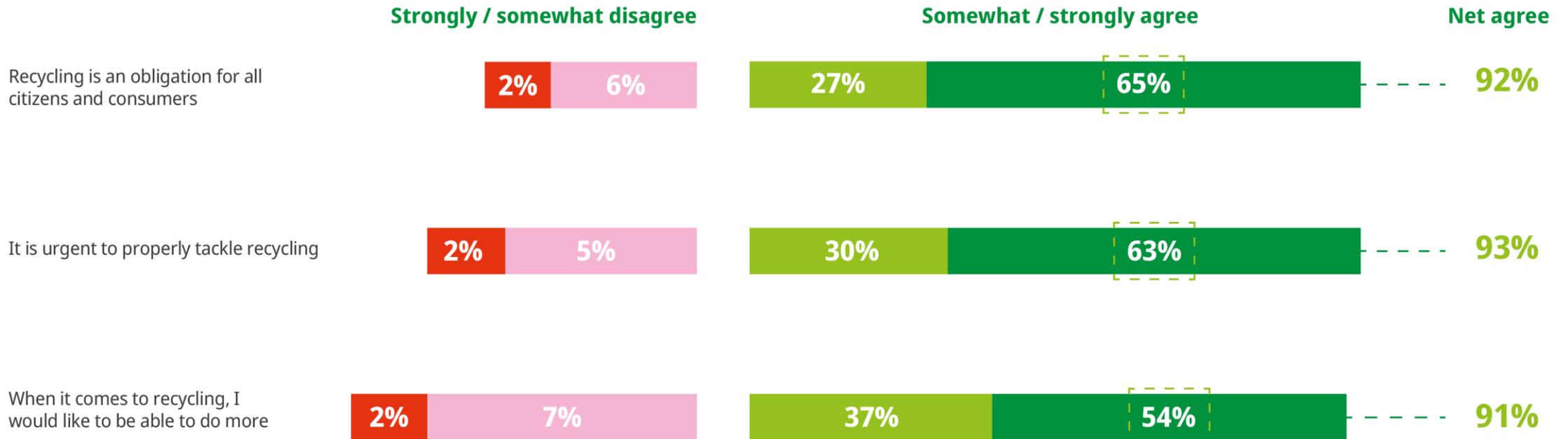
## To what extent do you agree or disagree that... (showing net agree)



# VIEWS ON RECYCLING - OVERALL

2 in 3 strongly agree that recycling is an obligation for all citizens and consumers and that it is urgent to properly tackle recycling. 91% would like to be able to do more.

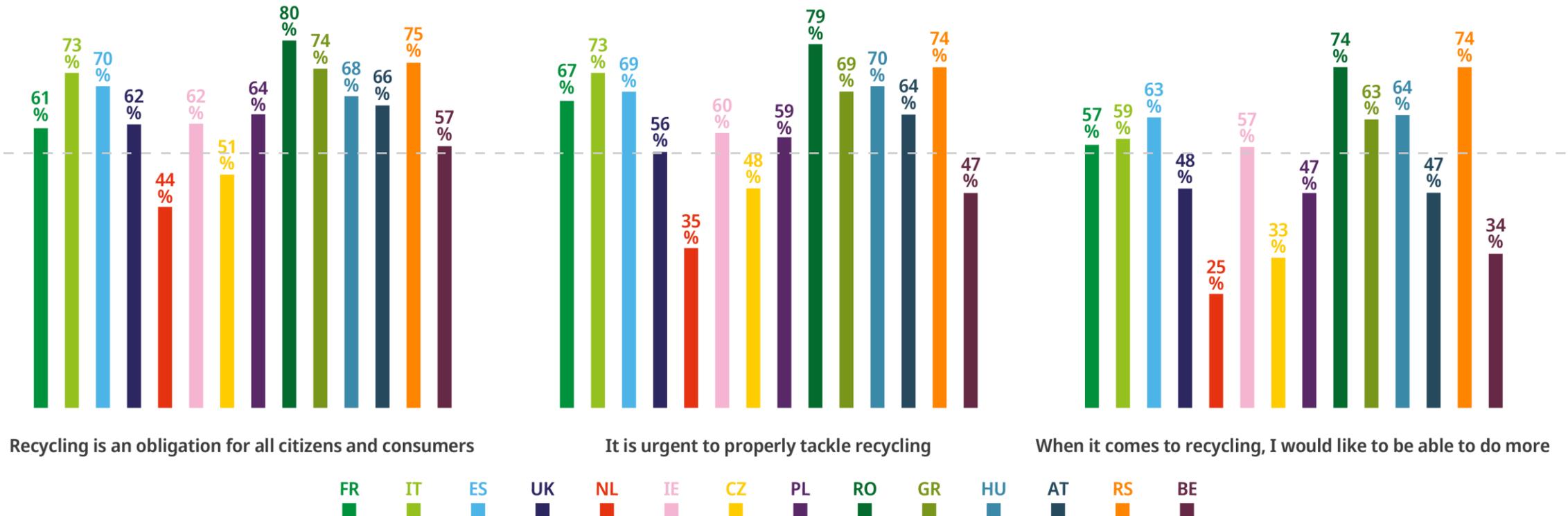
## To what extent do you agree or disagree that...



# VIEWS ON RECYCLING – BY COUNTRY

A majority of respondents strongly agree that recycling is an obligation for all citizens and consumers, with the exception of respondents in the Netherlands who under-index on all statements (however a majority would still agree if looking at the net). A majority of respondents from France, Italy, Ireland, Romania, Greece, Hungary and Serbia strongly agree with all statements.

## To what extent do you agree or disagree that... (showing strongly agree)



# RECYCLING HABITS

The vast majority of respondents recycle, but it remains a challenge to recycle outside of the home.

- Over 3 in 4 recycle all types of materials (drink cans, plastic, Tetra Pak or glass) often or always
- 57% always recycle aluminium drink cans.
- Serbia, the Netherlands and the Czech republic are more likely to rarely or never recycle drink cans.
- While 2 in 3 always recycle at home, a minority do so outside of the home.

The lack of appropriate ways to properly dispose of waste is cited as a key reason for not recycling.

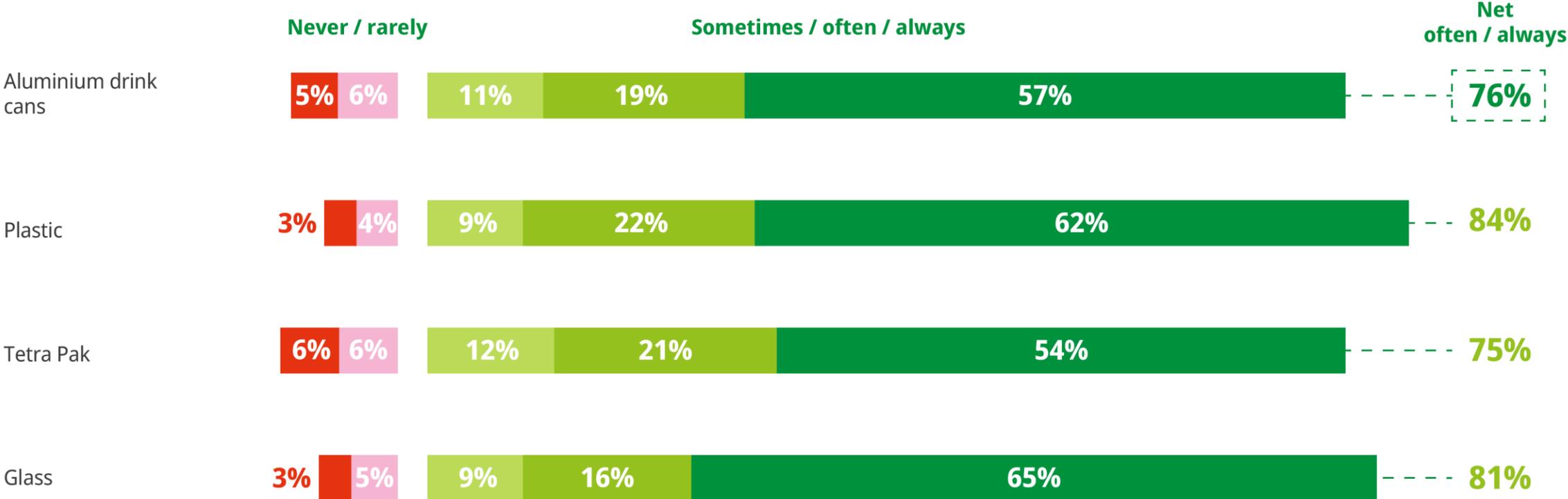
- Across countries, a vast majority of respondents would like to see more recycling bins in the streets, public spaces, beaches, beauty spots, trails, festivals or sporting events.



# MATERIAL RECYCLING HABITS - OVERALL

A majority of respondents say they typically always recycle all types of material tested. By a small margin, Glass is both the material most likely to be always recycled (65%) and the material most likely to be never/rarely recycled (14%). 76% often or always recycle Aluminium drink cans, compared to 84% for plastic, 81% for Glass and 75% for Tetra Pak.

## Do you typically recycle... (not showing: not sure)



# MATERIAL RECYCLING HABITS – ALUMINIUM DRINK CANS BY COUNTRY

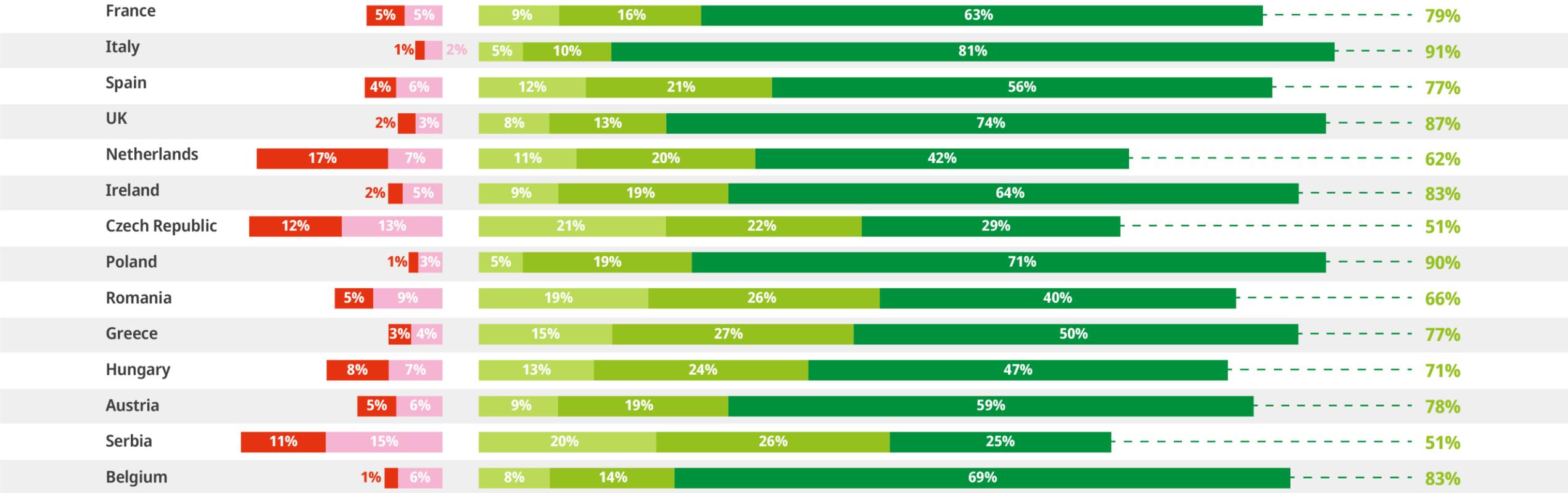
9 in 10 respondents in Italy or Poland say they often or always recycle Aluminium drink cans. This is the highest reported rate across countries. The Netherlands, Czech Republic and Serbia are the most likely to say they rarely or never recycle drink cans (24%, 25%, 26% respectively).

## Do you typically recycle Aluminium drink cans ... (not showing: not sure)

Never / rarely

Sometimes / often / always

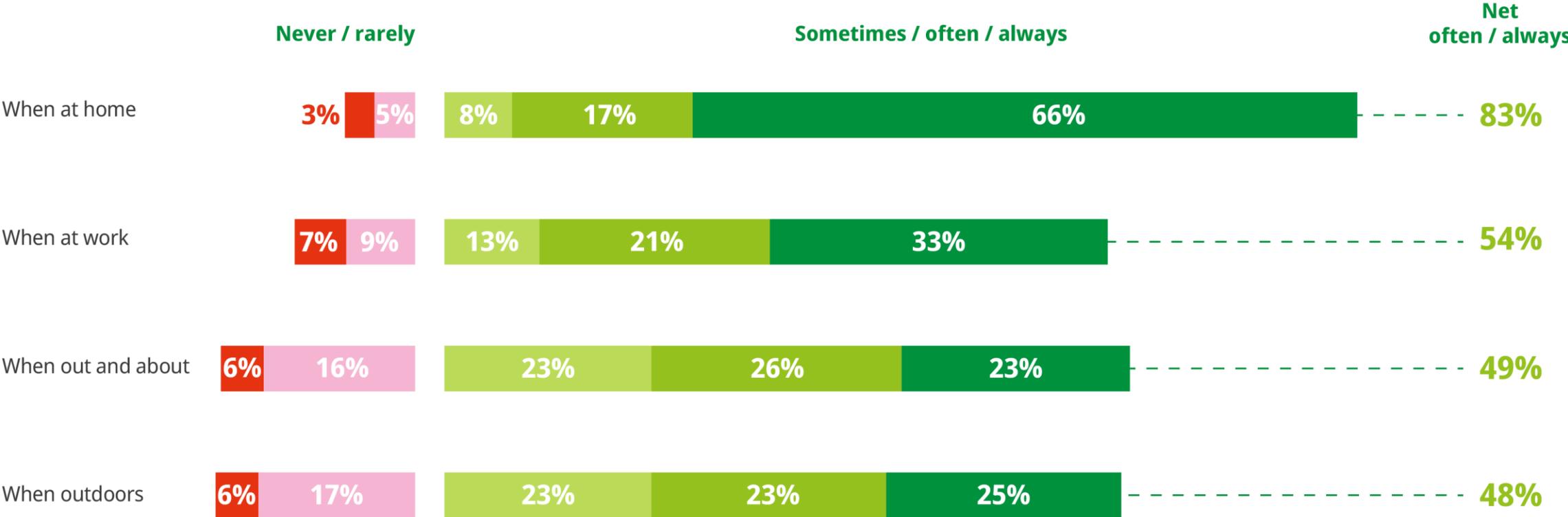
Net  
Often / always



# MATERIAL RECYCLING HABITS BY LOCATION - OVERALL

Respondents say they recycle more regularly at home, with 2 in 3 always recycling there, while only about 1 in 4 always recycle when out and about and outdoors (23% and 25%, respectively).

**Do you typically recycle...**  
 (not showing: not applicable, I do not do this)

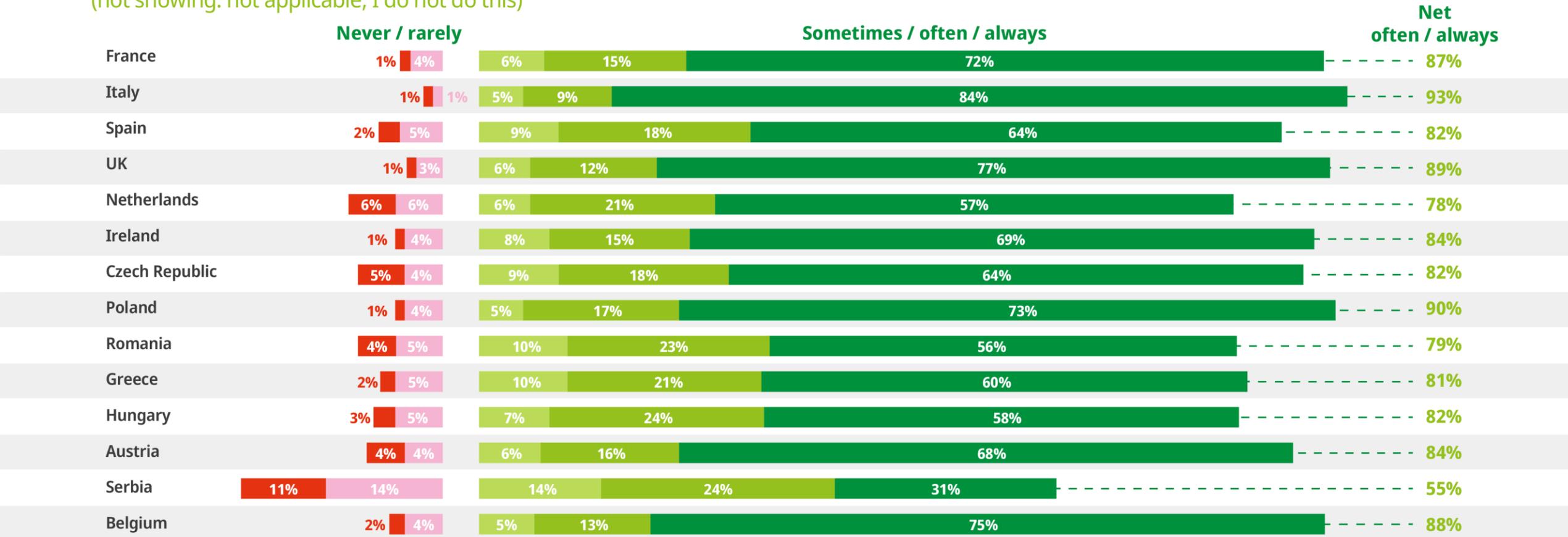


# DRINK RECYCLING HABITS: WHEN AT HOME – BY COUNTRY

84% of respondents in Italy say they always recycle when at home, this is in contrast with respondents in Serbia where only 31% say they always recycle at home, with 1 in 4 saying they rarely or never do.

## When you consume disposable drinks, how often are you able to dispose of your drink in a recycling bin?

(not showing: not applicable, I do not do this)



# DRINK RECYCLING HABITS: WHEN AT WORK – BY COUNTRY

Recycling habits at work are lower across the board when compared to at home. Respondents from Serbia report the lowest frequency of recycling when at work, with 36% saying they rarely or never recycle there (this is in line with the level of reported recycling at home). Additionally, less than half of respondents in France, the Netherlands and the UK say they often or always recycle when at work.

## When you consume disposable drinks, how often are you able to dispose of your drink in a recycling bin?

(not showing: not applicable, I do not do this)

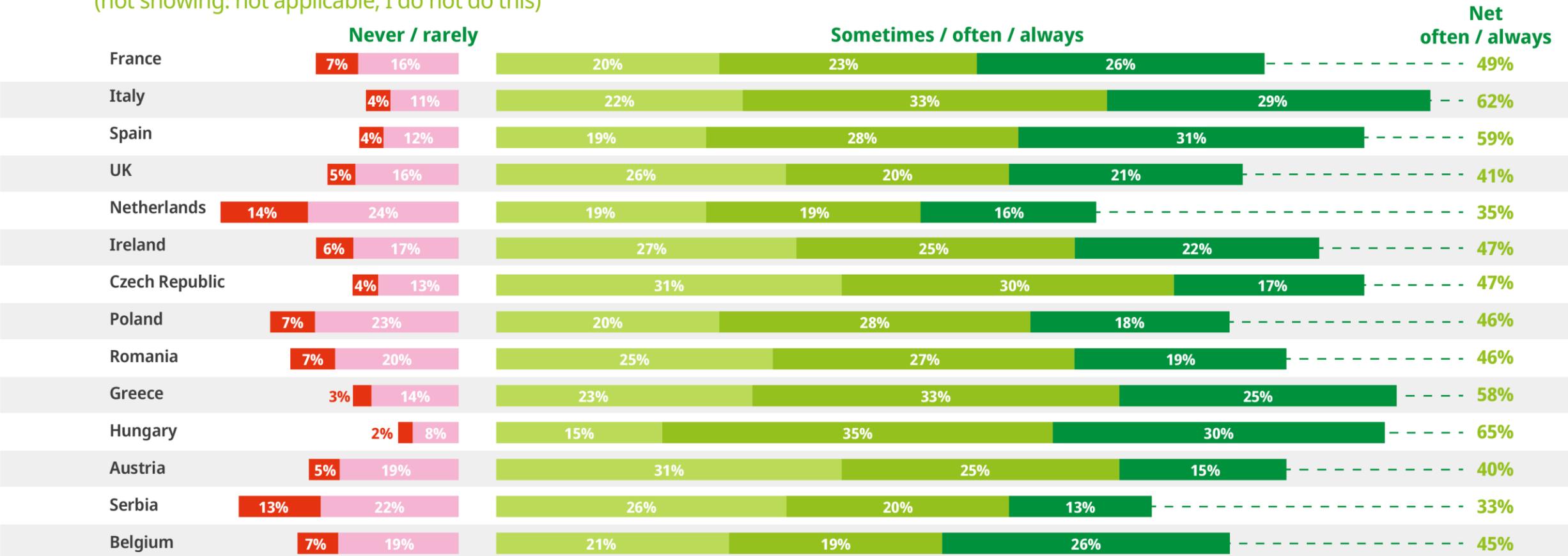


# DRINK RECYCLING HABITS: WHEN OUT AND ABOUT – BY COUNTRY

Italy, Spain, Greece and Hungary are the only 4 countries where a majority of respondents say they recycle often or always when out and about. Meanwhile, 38% of respondents in the Netherlands and 35% of respondents in Serbia never or rarely recycle when out and about.

## When you consume disposable drinks, how often are you able to dispose of your drink in a recycling bin?

(not showing: not applicable, I do not do this)

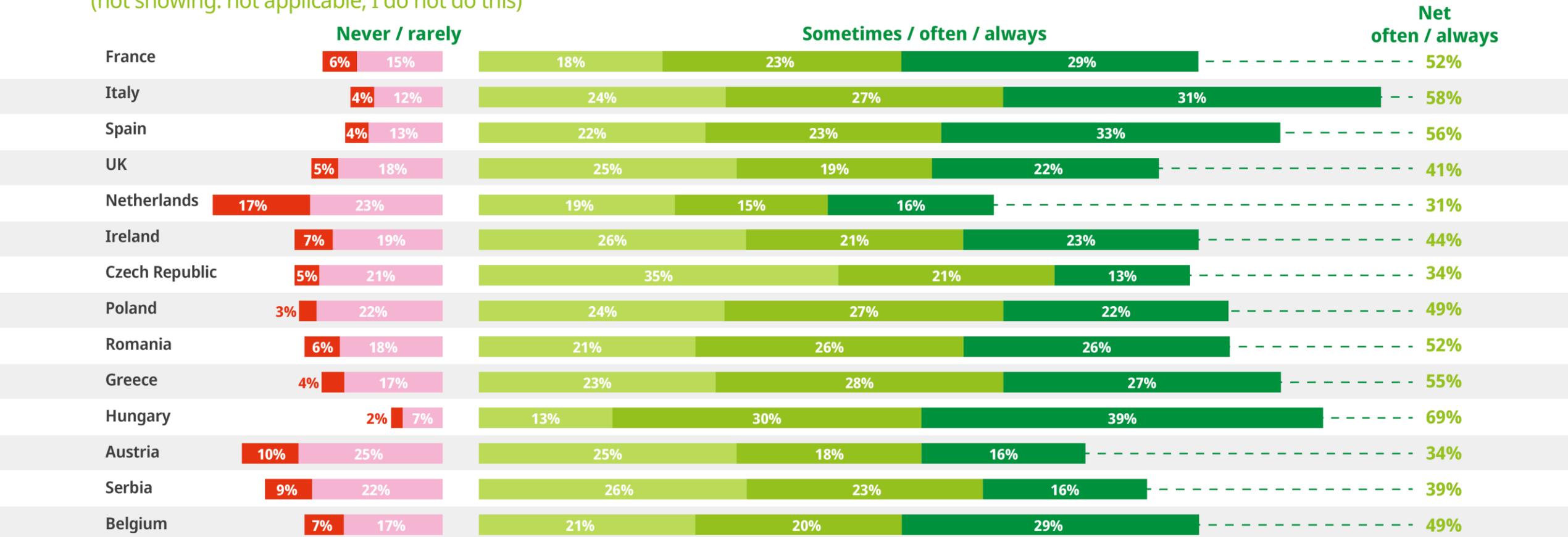


# DRINK RECYCLING HABITS: WHEN OUTDOORS (PARKS, BEACH, ETC) – BY COUNTRY

A majority of respondents from France, Italy, Spain, Romania, Greece and Hungary say they often or always recycle when outdoors. 40% of respondents in the Netherlands, 35% of respondents in Austria and 31% of respondents in Serbia say they rarely or never do so.

## When you consume disposable drinks, how often are you able to dispose of your drink in a recycling bin?

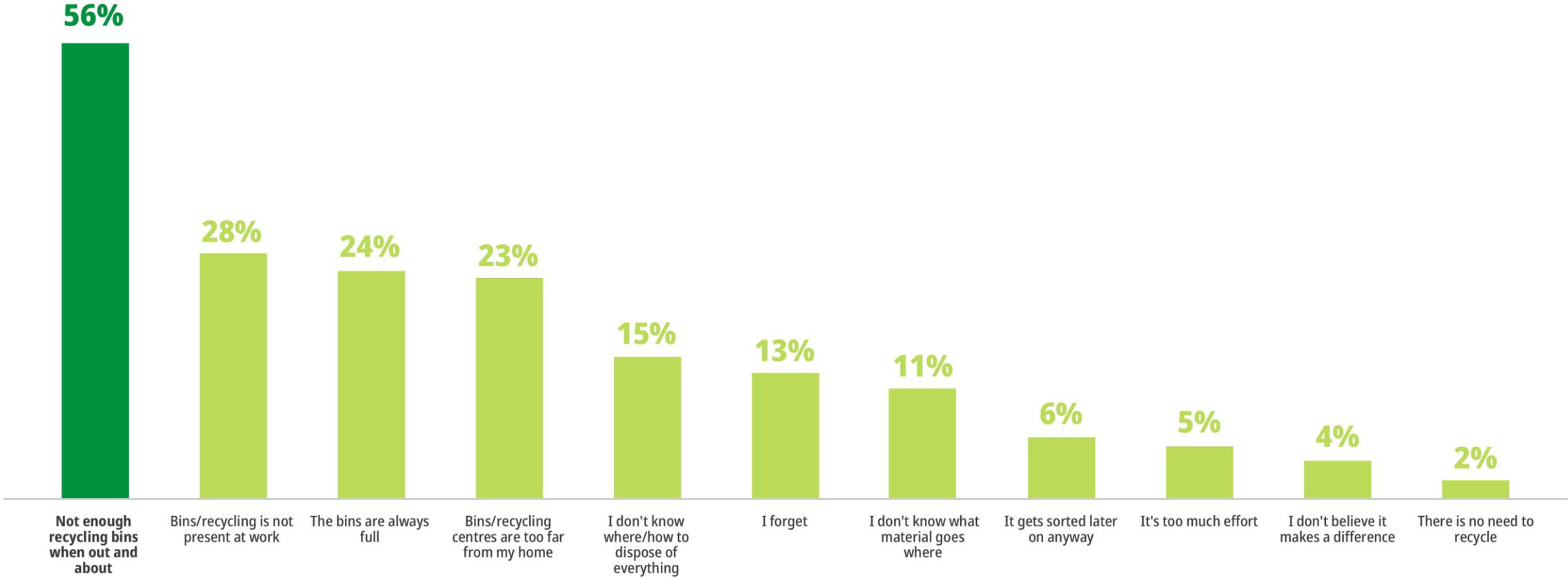
(not showing: not applicable, I do not do this)



# REASONS FOR NOT RECYCLING IN GENERAL – OVERALL

Amongst the reasons provided for not always recycling, a majority (56%) say there are not enough recycling bins when out and about. The top 4 reasons for not recycling are all related to inadequate bins / recycling centres.

**What are some of the reasons you may not always recycle? Please select all that apply.**

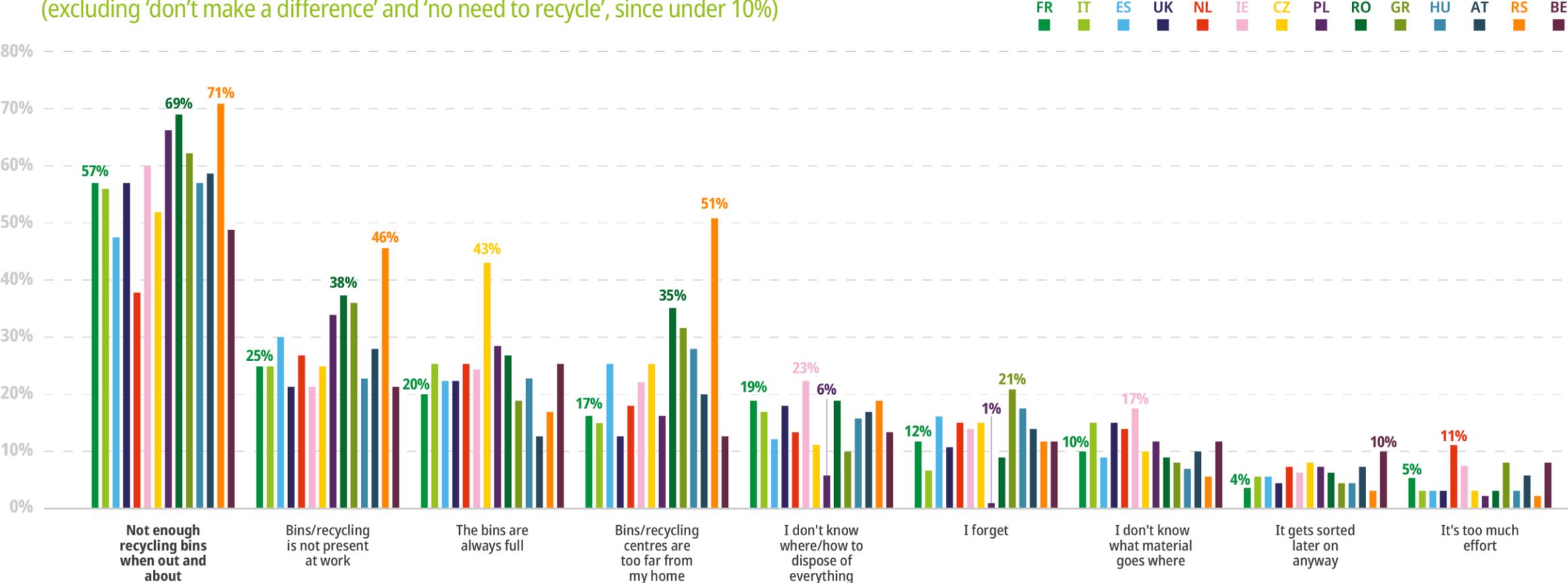


Asked of all who don't always recycle  
N=12,284

# REASONS FOR NOT RECYCLING IN GENERAL – BY COUNTRY

Serbia and to some extent Romania over-index on ‘not enough bin to recycle (71%, 69%), bins not present at work (46%, 38%) and bins and recycling centres too far from home (51%, 35%). Respondents from the Czech Republic are more likely than other countries to say ‘bin are always full’ (43% and the second cited reason for not recycling). 23% of respondents in Ireland say they do not know where/how to dispose of drink cans.

**What are some of the reasons you may not always recycle? Please select all that apply.**  
 (excluding ‘don’t make a difference’ and ‘no need to recycle’, since under 10%)

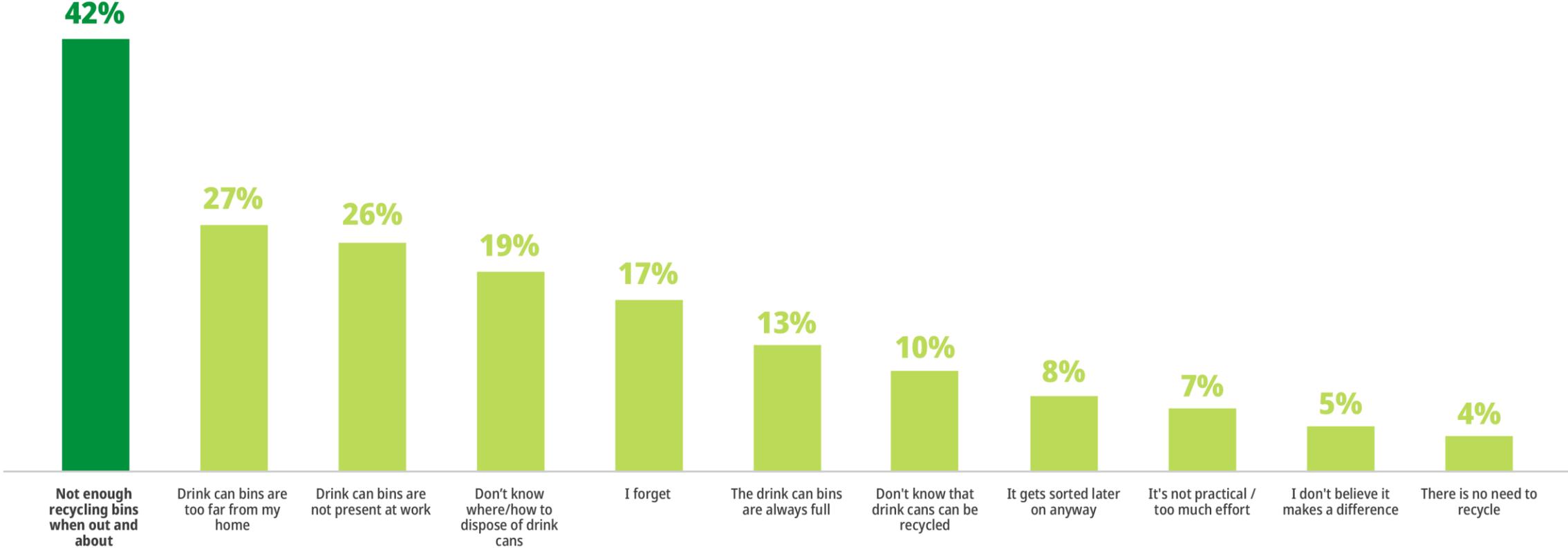


Asked of all who don't always recycle

# REASONS FOR NOT RECYCLING DRINK CANS – OVERALL

Not enough recycling bins when out and about is the most cited reason for not recycling drink cans (42%), followed by drink can bins being too far from home (27%) and drink can bins not present at work (26%). 19% say they do not know where or how to dispose of drink cans.

**What are some of the reasons you may not always recycle? Please select all that apply.**  
(Not showing 'other' 4%)

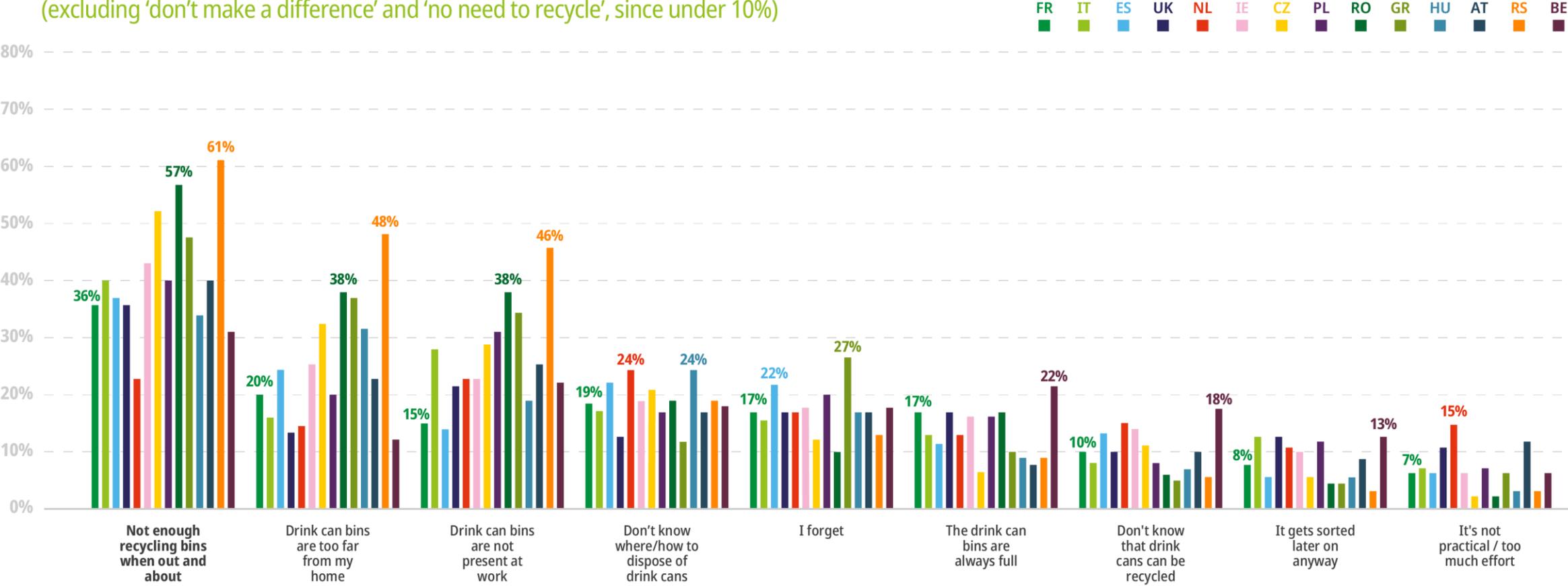


Asked of all who don't always recycle  
N=5,979

# REASONS FOR NOT RECYCLING DRINK CANS – BY COUNTRY

Serbia and to some extent Romania over-index on ‘not enough bins to recycle’ (61%, 57%), bins not present at work (48%, 38%) and bins not present at work (46%, 38%). Respondents from Greece are more likely than other countries to say they ‘forget’ (27%).

**What are some of the reasons you may not always recycle? Please select all that apply.**  
 (excluding ‘don’t make a difference’ and ‘no need to recycle’, since under 10%)



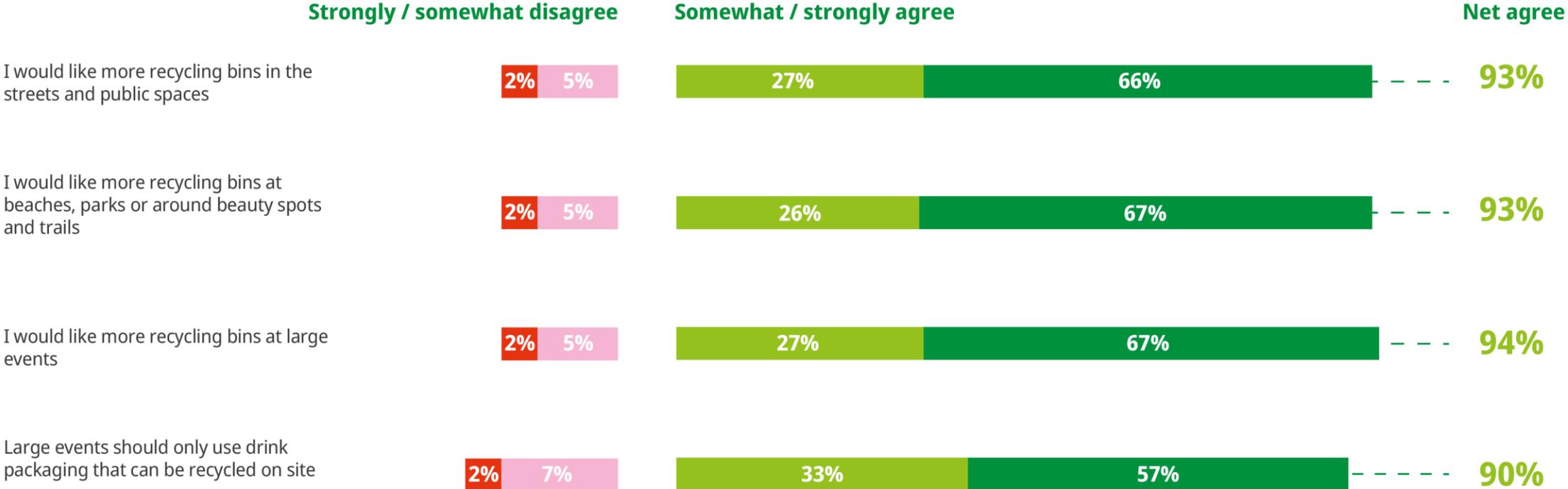
Asked of all who don't always recycle  
 Note: in some markets 'other specify' > 10% (not shown). See tables and open ended data for details.

# RECYCLING WHEN OUT AND AT EVENTS - OVERALL

The majority of respondents feel strongly about seeing more recycling bins on the streets, in public spaces, on beaches, beauty spots, on trails, and at large events (such as festivals or sporting events).

2 in 3 also strongly agree that large events should only use packaging that can be recycled on site.

## To what extent do you agree or disagree that...

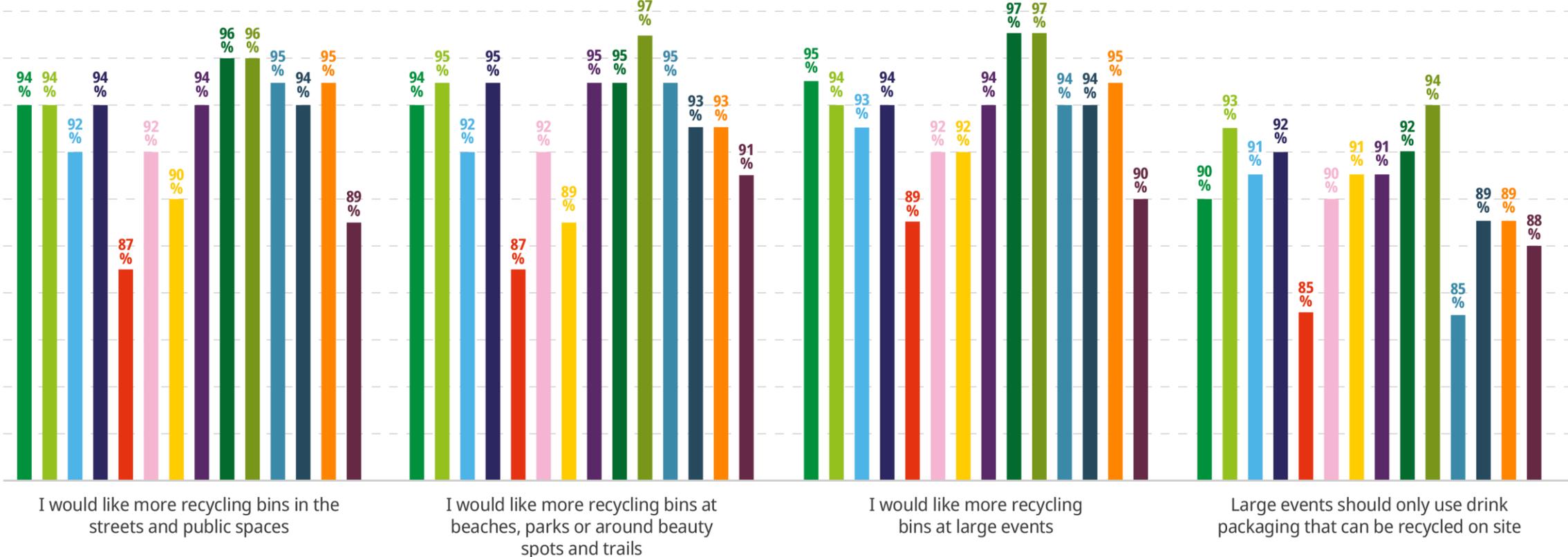


# RECYCLING WHEN OUT AND AT EVENTS – BY COUNTRY

Irrespective of the country, a vast majority of respondents say they would like to see more recycling bins in the streets, public spaces, beaches, beauty spots, trails, and large events (such as festivals or sporting events).

Respondents across markets also say that that large events should only use packaging that can be recycled on site.

**To what extent do you agree or disagree that...**  
(showing net agree (somewhat+ strongly))



# IN THEIR OWN WORDS... (UK ONLY)

## WHAT WOULD MAKE YOU RECYCLE MORE?

*“When I was working I was in charge of a local authority recycling plant, that was in the 1960s, everything was recycled, tins, glass, paper, cardboard, wool and many more items, it helped to keep the [tax] rates down, employees were given a monthly bonus in fact, everyone received rewards for recycling, there is not enough done today as was done in the 1960s.”*

*“Better organisation of my recycling bins at home and maybe more obvious signs in public areas, possibly a reward system for recycling. Every 5 cans etc you recycle you get a coupon for a free drink. (Works with branded drinks such as Coca Cola)”*

*“Introduce strong penalties for people who blatantly mix recyclable materials with landfill waste”*

*“Our council has taken items off their list that state they are recyclable on the packaging so we are forced to put some recyclable items in the general waste bin”*

*“Place more recycling bins in town centres”*

*“Be honest about where it goes”*

# IN THEIR OWN WORDS... (UK ONLY)

## WHAT WOULD MAKE YOU RECYCLE MORE?

*“Educate the masses of the importance of recycling to save the environment”*

*“Well you could ban all plastic bags, and wrapping on food. Also more recycling centres around the place”*

*“Clear instructions on packaging of what type of material it is and if it can be recycled in the UK”*

*“The council to collect recycling bins more often  
Manufacturers to only use recyclable materials”*

*“The main problem is the multitude of unclear recycling symbols and the lack of clarity of the labels. It needs legislation of simple clear instructions, including written instructions as well as symbols, so there is no doubt as to whether an item can be recycled.”*

*“Use more sustainable natural materials to reduce the impact of people who do not recycle”*

*“Have the same recycling rules /conditions nationwide”*

*“Council should provide more recycling bins at stores and bus stops”*

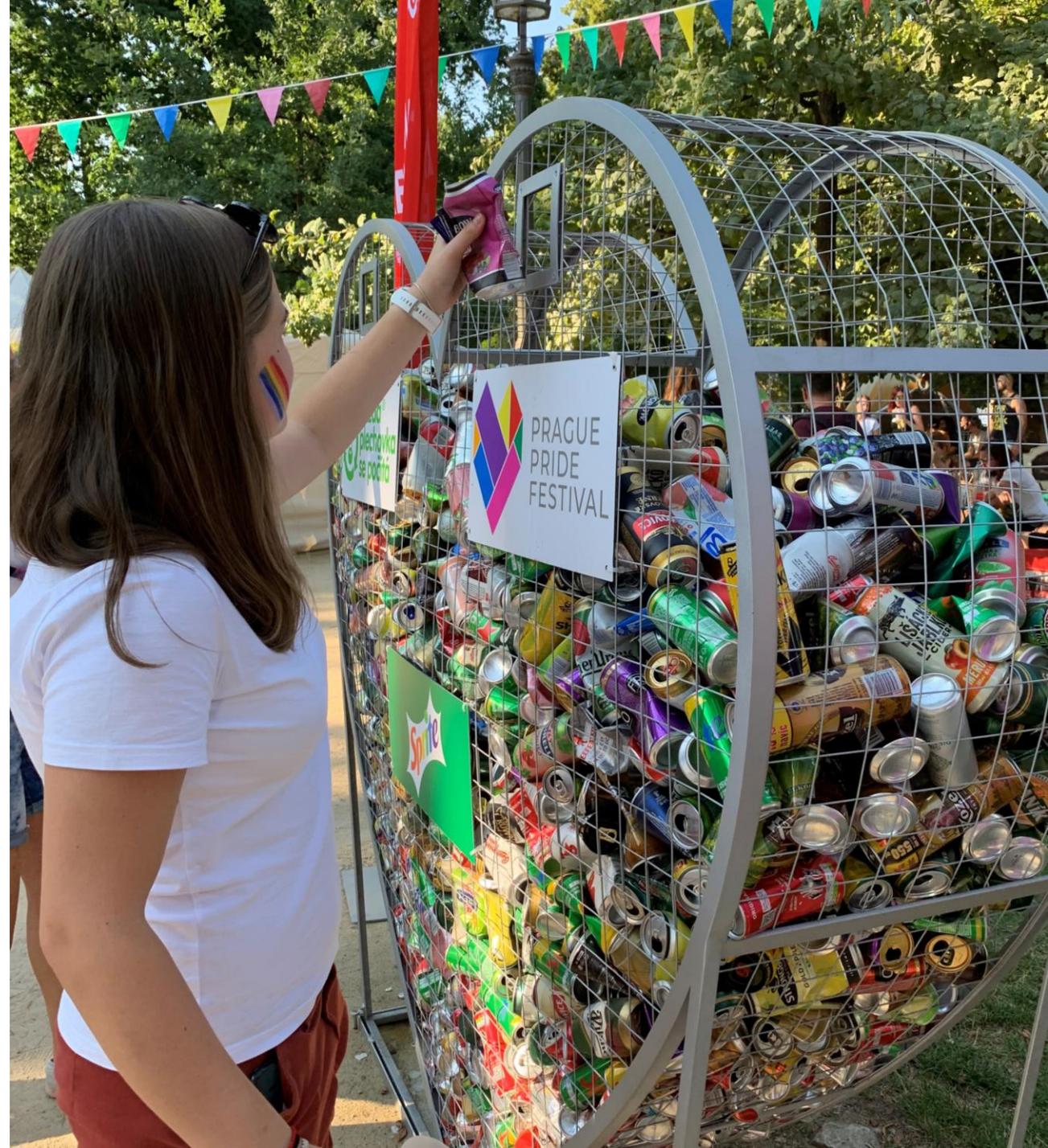
# EDUCATING ON RECYCLING

Respondents believe that roughly half of the packaging they place in recycling bins actually get recycled, while 37% of packaging gets recycled when placed with general waste.

Across countries, most respondents say more needs to be done to encourage recycling.

- 41% say we should recycle all drink cans.

Just over half of respondents say they do not know what happens to the recycling waste after leaving the home or office, where it goes to be recycled, what happens to the material after recycling and especially how much of it gets recycled and that they would like to know more.



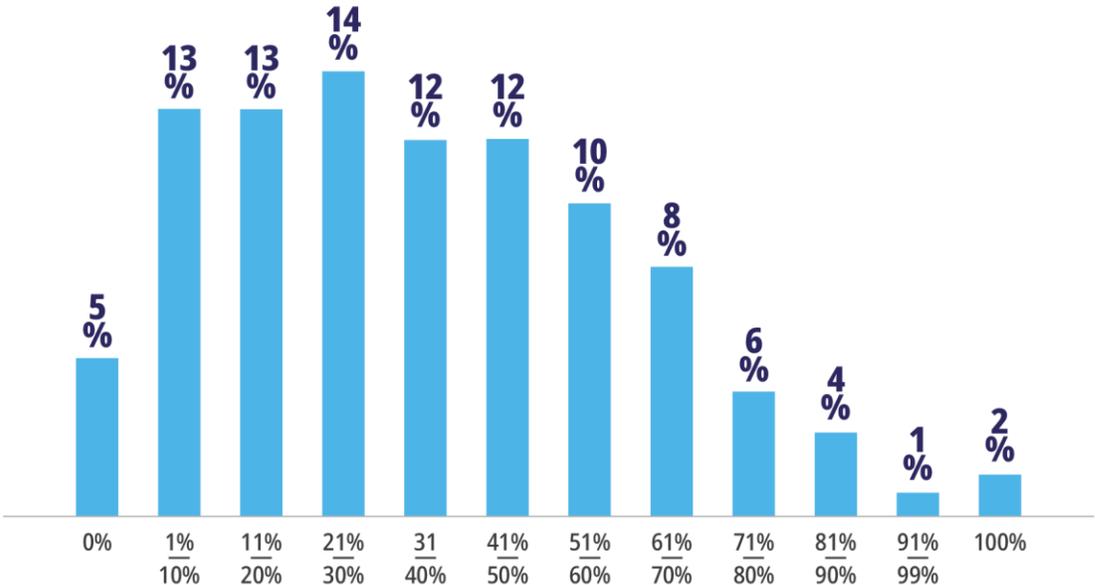
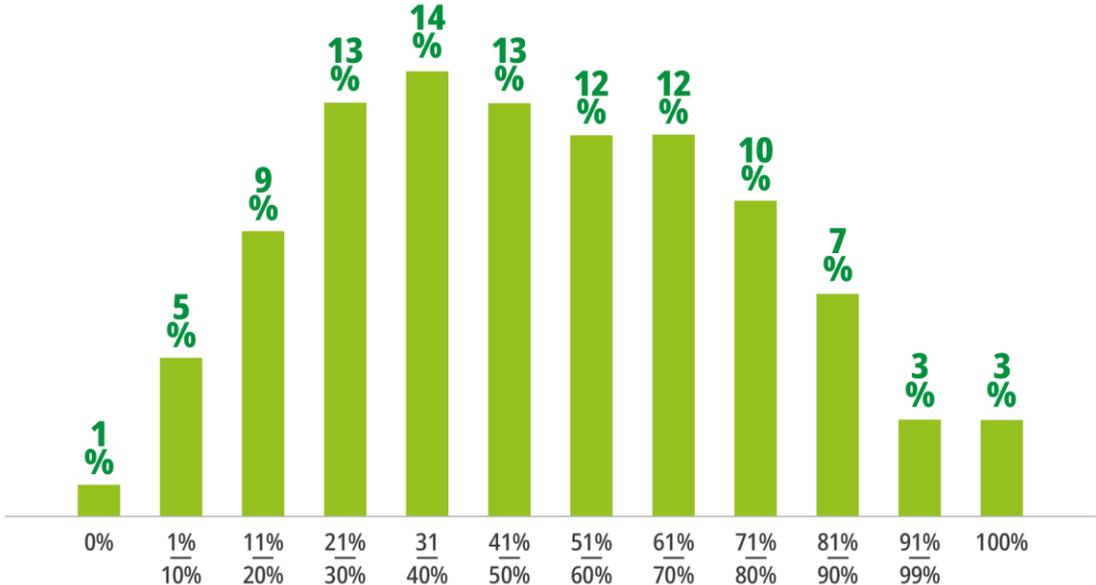
# ESTIMATION OF RECYCLING RATE - OVERALL

No clear consensus: Overall, respondents estimate that a greater proportion of packaging waste gets recycled from a *recycling* bin compared to a *general* bin. The majority of respondents (53%) estimate that less than half of their packaging waste get recycled when placed in the recycling bin. An even greater majority (63%) say the same of packaging placed in general bins.

## How much of the packaging waste in your country do you estimate gets recycled?

For waste placed in a recycling bin  
Average: 49%, Net: 1-50%: 53%

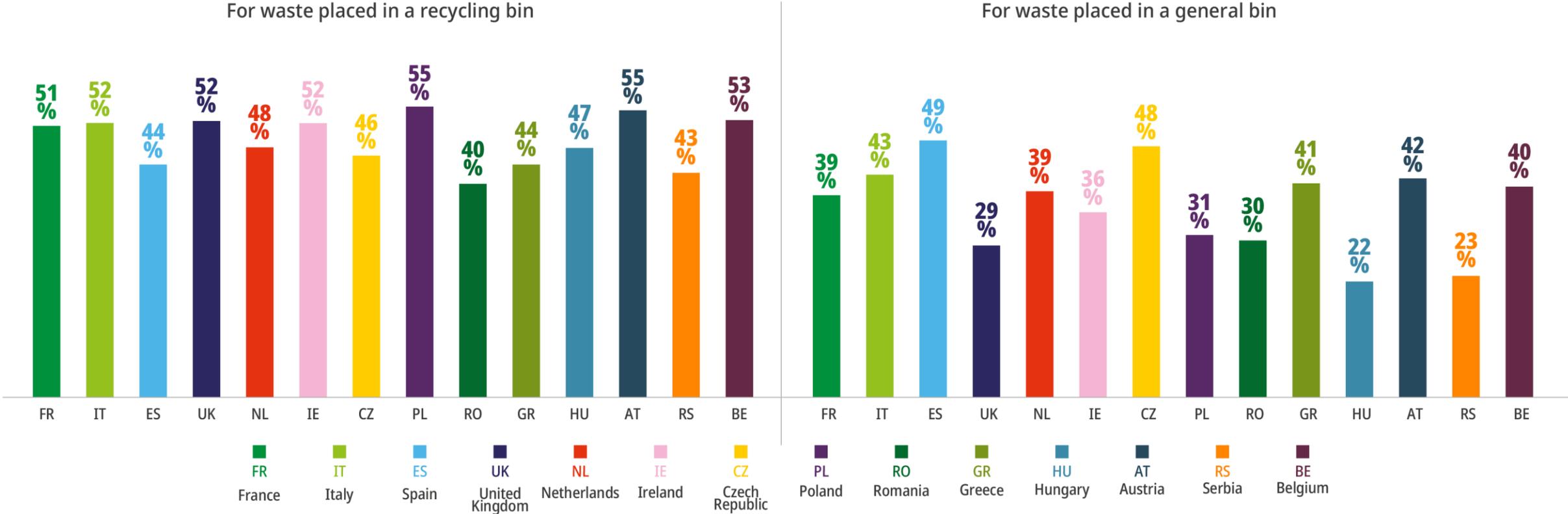
For waste placed in a general bin  
Average: 37% Net: 1-50%: 63%



# ESTIMATION OF RECYCLING RATE – BY COUNTRY

On average respondents estimate that 40% to 55% of the packaging waste placed in their recycle bins gets recycled and 22% to 49% of the waste placed in their general bins, with the UK, Hungary and Serbia estimating the lowest amounts (29%, 23% and 22% respectively).

## How much of packaging waste in your country do you estimate gets recycled?

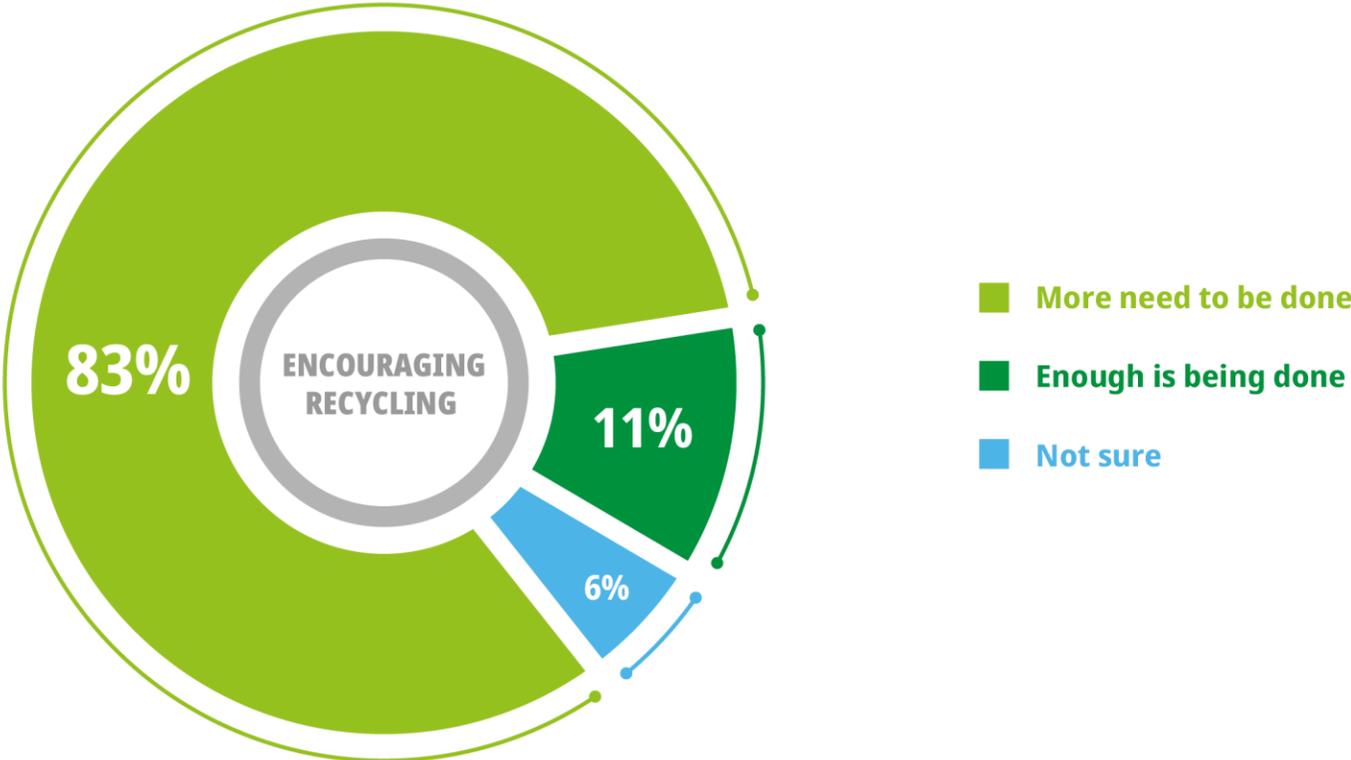


ECC 2020 – N:13,793  
 FR:1,035 – IT: 1,042 – ES: 2,028 – UK: 1,518 – NL: 838 – IE: 769 – CZ: 801 – PL: 826 – RO: 830 – GR: 811 – HU: 842 – AT: 821 – RS: 795 – BE: 837

# ENCOURAGING RECYCLING - OVERALL

Overall, 4 in 5 respondents say more needs to be done to encourage recycling

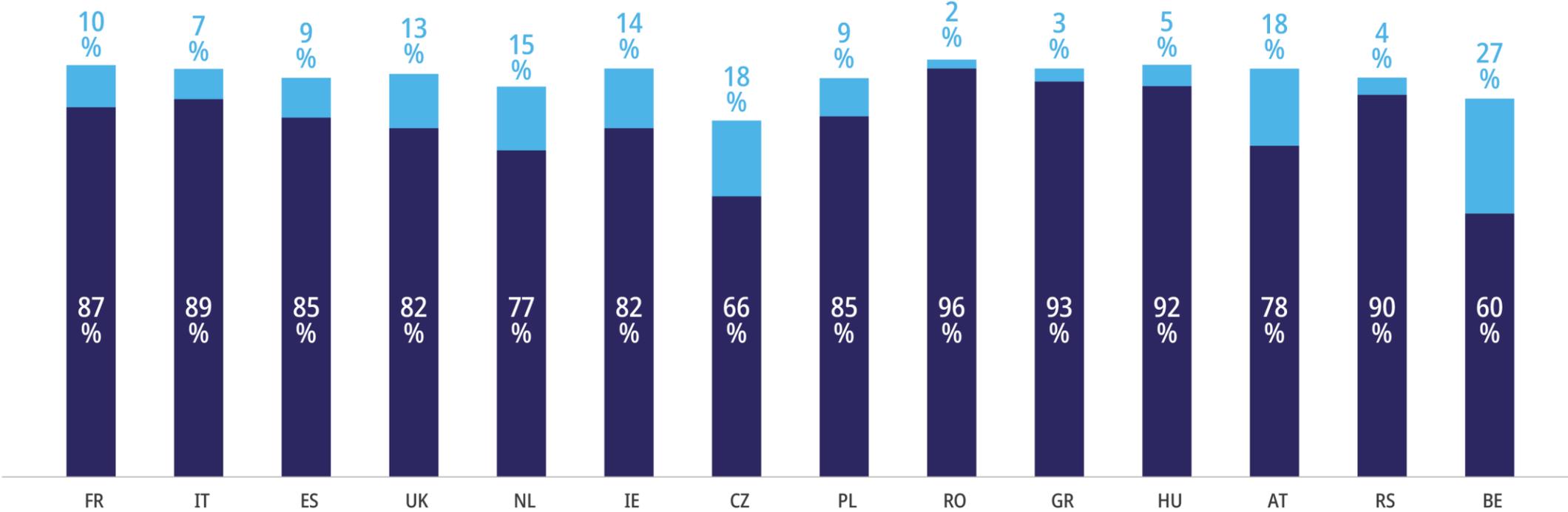
**Do you think enough is being done to encourage recycling in your country or do you feel more needs to be done?**



# ENCOURAGING RECYCLING – BY COUNTRY

Across countries, most respondents say more needs to be done to encourage recycling, with Romania, Greece, Hungary and Serbia scoring the highest (over 9 in 10) and The Czech Republic and Belgium with relatively lower scores (just over 6 in 10).

**Do you think enough is being done to encourage recycling in your country or do you feel more needs to be done?**  
(not showing: 'not sure')

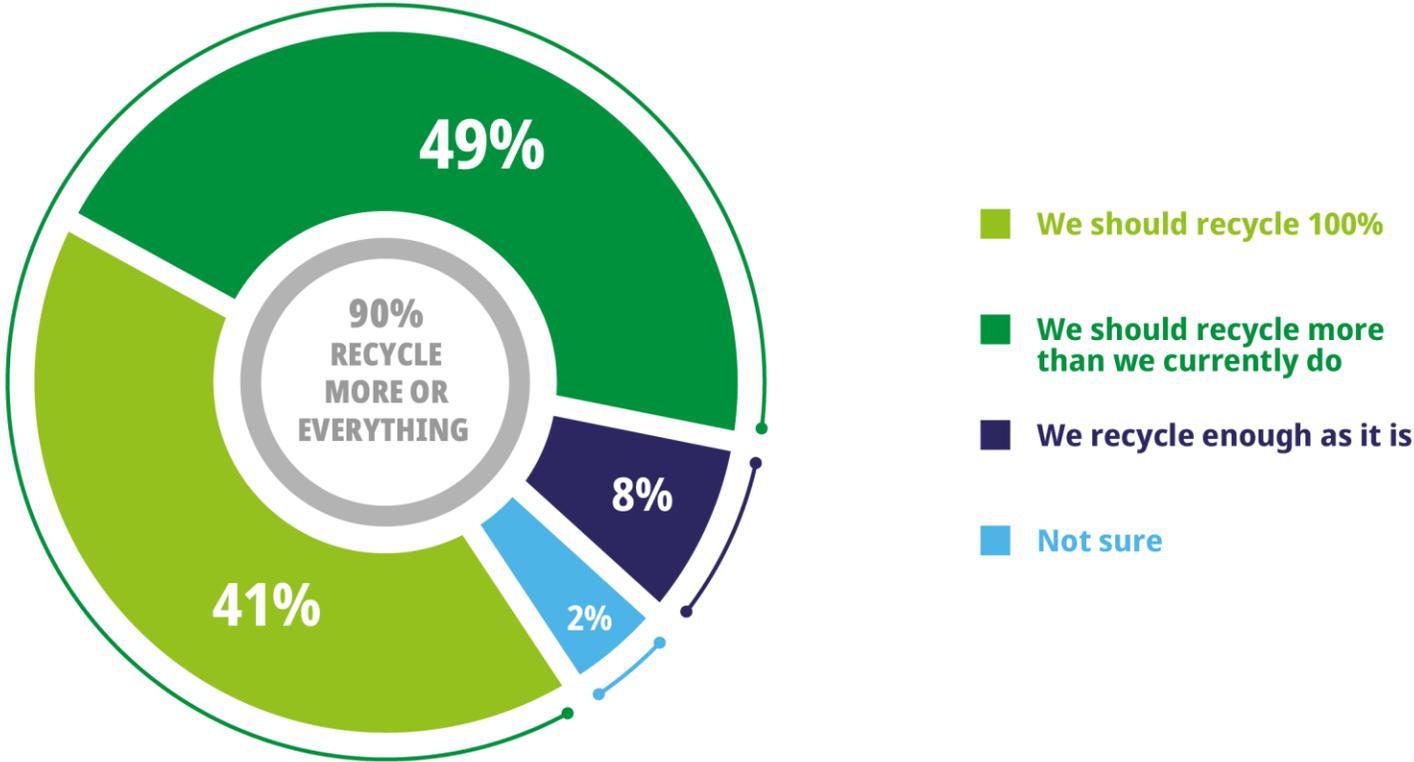


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# RECYCLING DRINK CANS - OVERALL

Overall, 90% of respondents say their country should recycle at least more if not all drink cans, with 2 in 5 saying we should recycle 100% of drink cans.

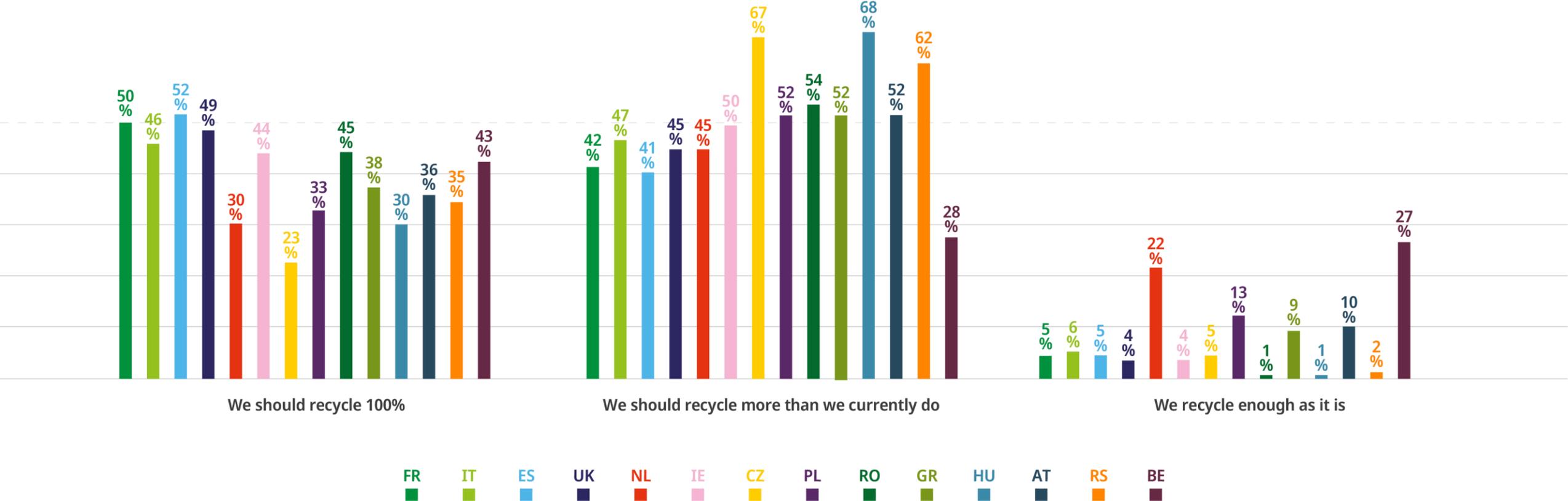
An average of 74.5% of drink cans get recycled in Europe, and an average of <XX%> of drink cans are recycled in your country.  
Do you think the recycling level in <COUNTRY> is sufficient or that it should be higher?



# RECYCLING DRINK CANS – BY COUNTRY

Across all countries, a large majority of respondents say their country should recycle at least more if not all drink cans. A majority of respondents in France and Spain say their country should recycle 100% of drink cans. The Netherlands and Belgium are most likely to say they are recycling enough as it is with 22% and 27% respectively.

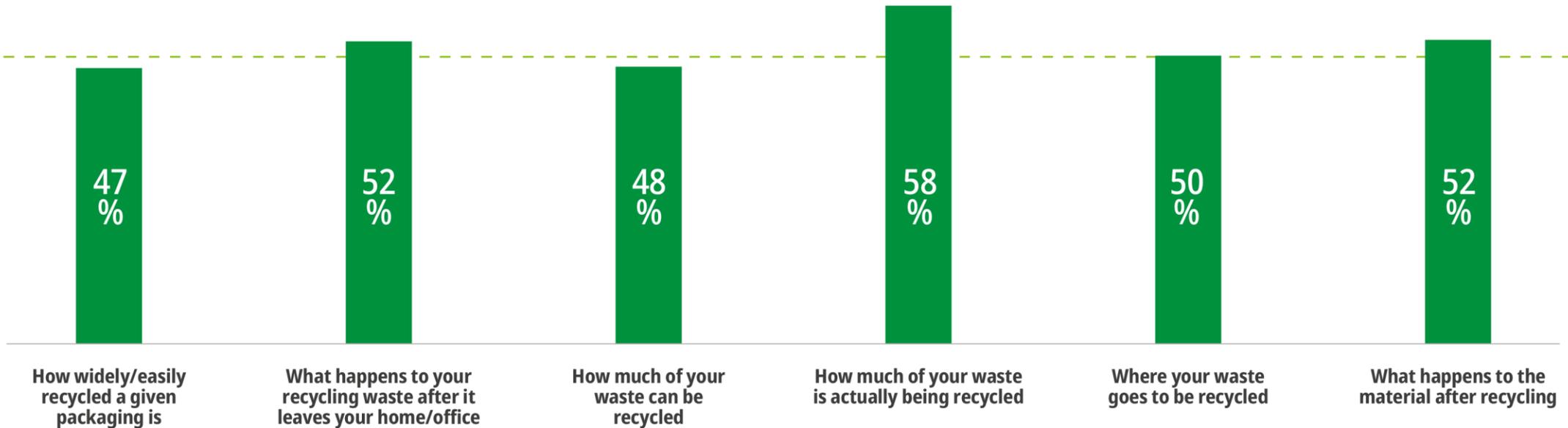
An average of 74.5% of drink cans get recycled in Europe, and an average of <XX%> of drink cans are recycled in your country.  
Do you think the recycling level in <COUNTRY> is sufficient or that it should be higher?



# FEELING INFORMED ABOUT RECYCLING (ALL STATEMENTS) - OVERALL

When it comes to what happens to the recycling waste after leaving the home or office, where it goes to be recycled, what happens to the material after recycling and especially how much of it gets recycled: respondents say they are not well informed and would like to know more.

**How well informed do you feel about** (Showing: Not well informed and would like to know more)

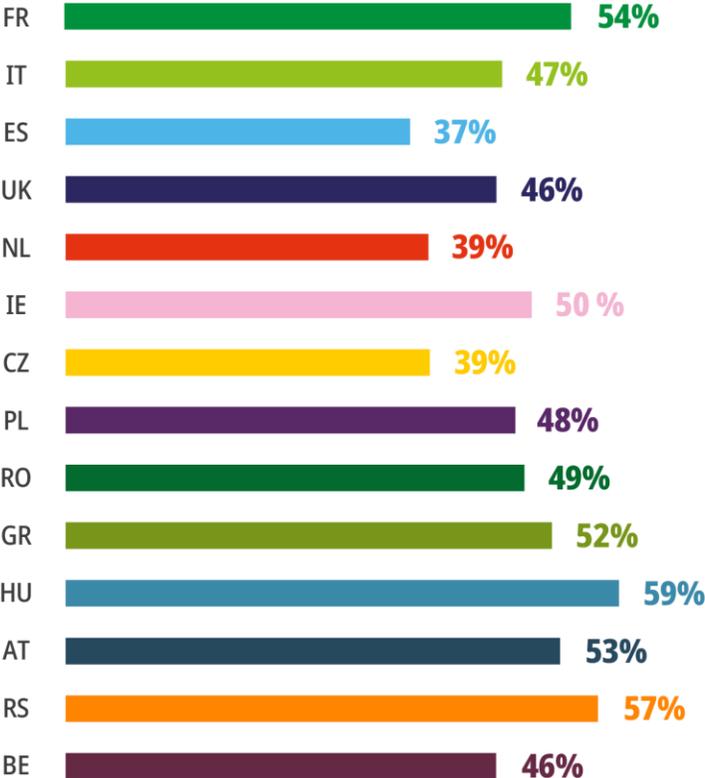


# FEELING INFORMED ABOUT RECYCLING – BY COUNTRY

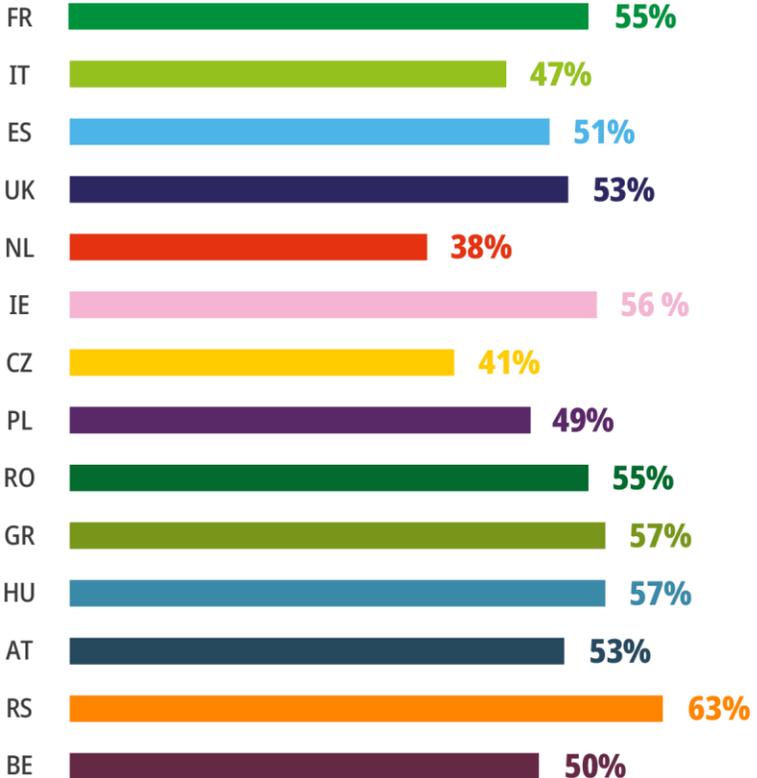
Respondents from the Czech Republic and Netherland feel the least poorly informed about what happens to their recycling waster after it leaves their home/office and would like to know more

## How well informed do you feel about (Showing: Not well informed and would like to know more)

### How widely/easily recycled a given packaging is



### What happens to your recycling waste after it leaves your home/office

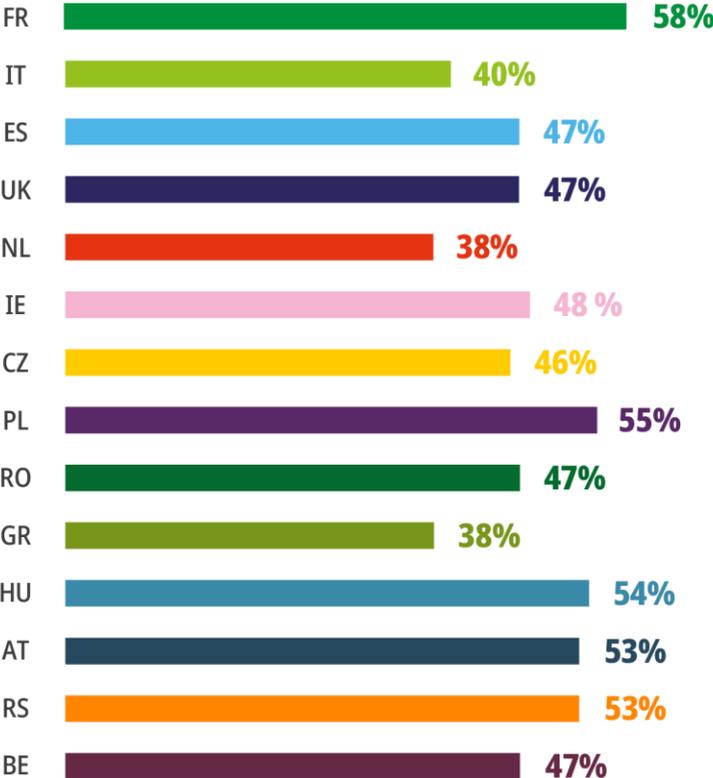


# FEELING INFORMED ABOUT RECYCLING – BY COUNTRY

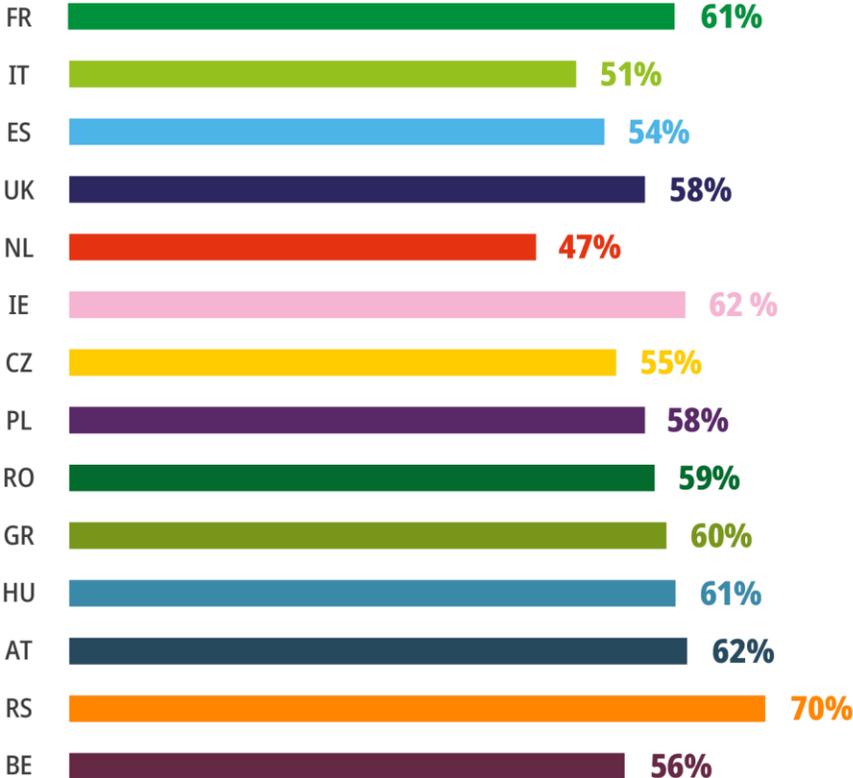
Respondents from the Serbia feel particularly poorly informed about how much waste is actually being recycled and would like to know more.

## How well informed do you feel about (Showing: Not well informed and would like to know more)

How much of your waste can be recycled



How much of your waste is actually being recycled

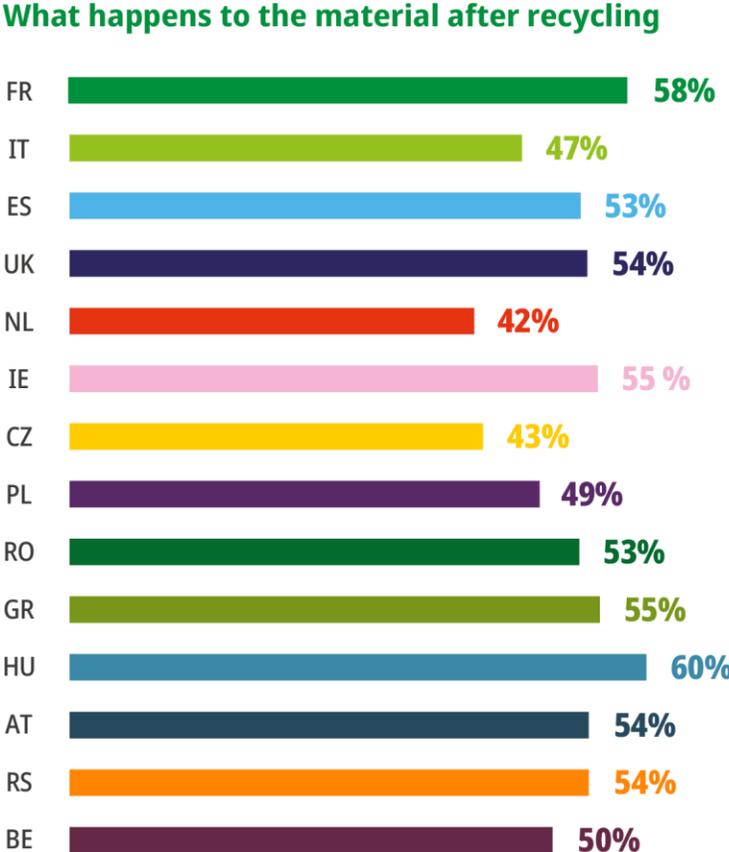
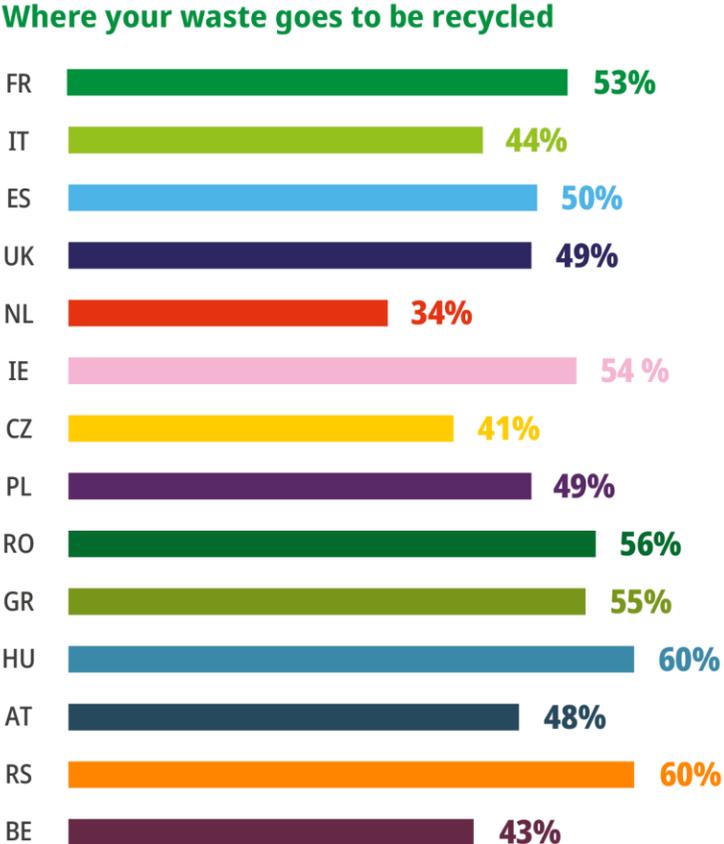


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# FEELING INFORMED ABOUT RECYCLING – BY COUNTRY

Respondents from Hungary and Serbia feel particularly poorly informed about where their waste goes to be recycled and would like to know more.

## How well informed do you feel about (Showing: Not well informed and would like to know more)



# UNDERSTANDING SYMBOLS - OVERALL

The green dot is the most recognised symbol, with 78% saying they have seen it before (versus 43% for MRS and 49% for the aluminium symbol). Perceived clarity is the lowest for the Aluminium symbol: only 49% understand it.

## How familiar are you with the symbols shown?



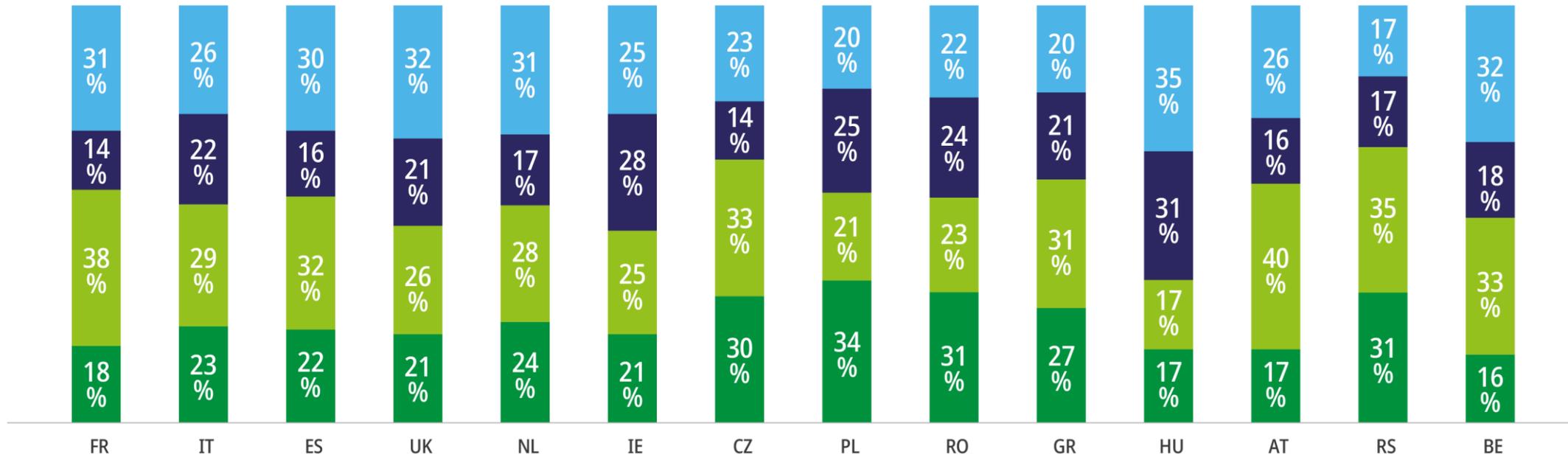
# UNDERSTANDING SYMBOLS – BY COUNTRY

Only a small proportion of respondents have seen the MRS symbol before and fully understand it. Recognition is the lowest in France, Austria and Belgium with 32%, 33% and 34% respectively saying they have seen it before. Perceived clarity is the lowest in Hungary where 66% of respondents say they do not understand the symbol.

## How familiar are you with the symbols shown?



- I have never seen it before, and I don't fully understand it
- I have seen it before but I don't fully understand it
- I have never seen it before, but I fully understand it
- I have seen it before and fully understand it



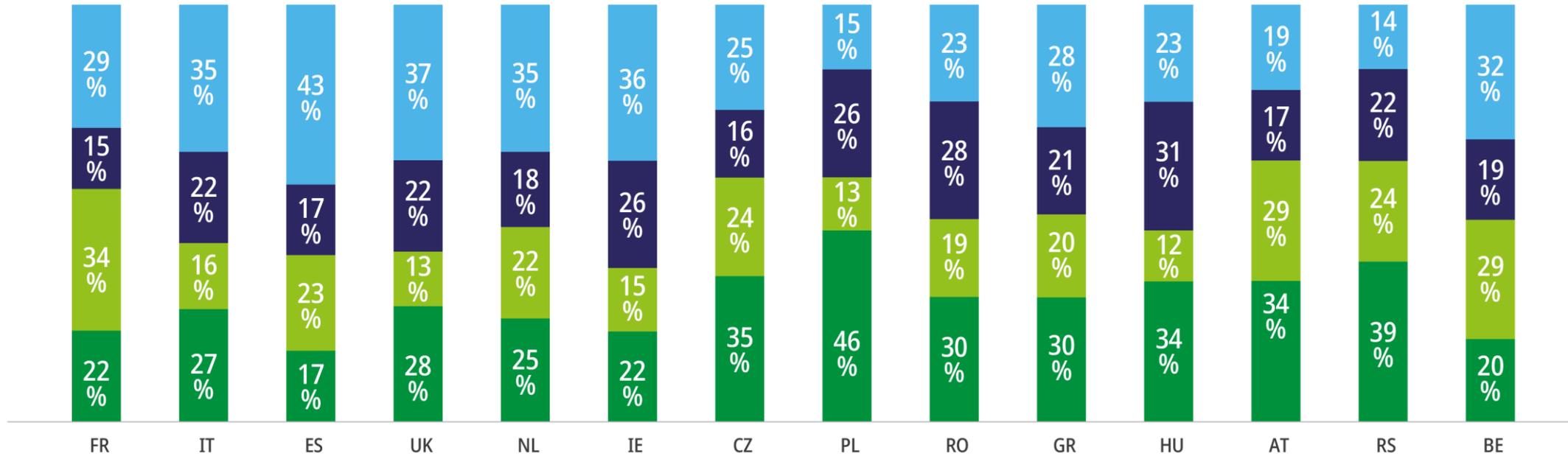
# UNDERSTANDING SYMBOLS – BY COUNTRY

Recognition is the lowest in Spain, France and Belgium with just 34%, 37%, and 39% respectively saying they have seen it before. Perceived clarity is the lowest in Ireland where 62% of respondents say they do not understand the symbol.

## How familiar are you with the symbols shown?



- I have never seen it before, and I don't fully understand it
- I have seen it before but I don't fully understand it
- I have never seen it before, but I fully understand it
- I have seen it before and fully understand it



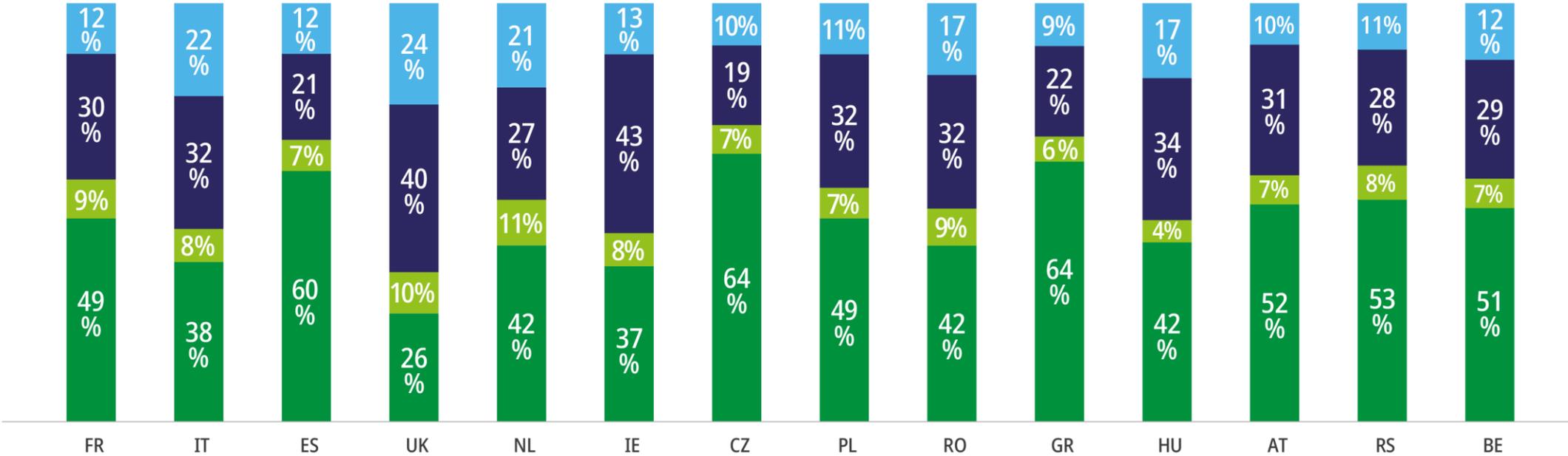
# UNDERSTANDING SYMBOLS – BY COUNTRY

Over 60% of respondents in Spain, the Czech Republic and Greece (as well as a majority in Austria, Serbia and Belgium) say they have seen the green dot before and fully understand it, while only 26% of respondents in the UK say the same.

## How familiar are you with the symbols shown?



- I have never seen it before, and I don't fully understand it
- I have seen it before but I don't fully understand it
- I have never seen it before, but I fully understand it
- I have seen it before and fully understand it



ECC 2020 – N:13,793  
 FR:1,035 – IT: 1,042 – ES: 2,028 – UK: 1,518 – NL: 838 – IE: 769 – CZ: 801 – PL: 826 – RO: 830 – GR: 811 – HU: 842 – AT: 821 – RS: 795 – BE: 837

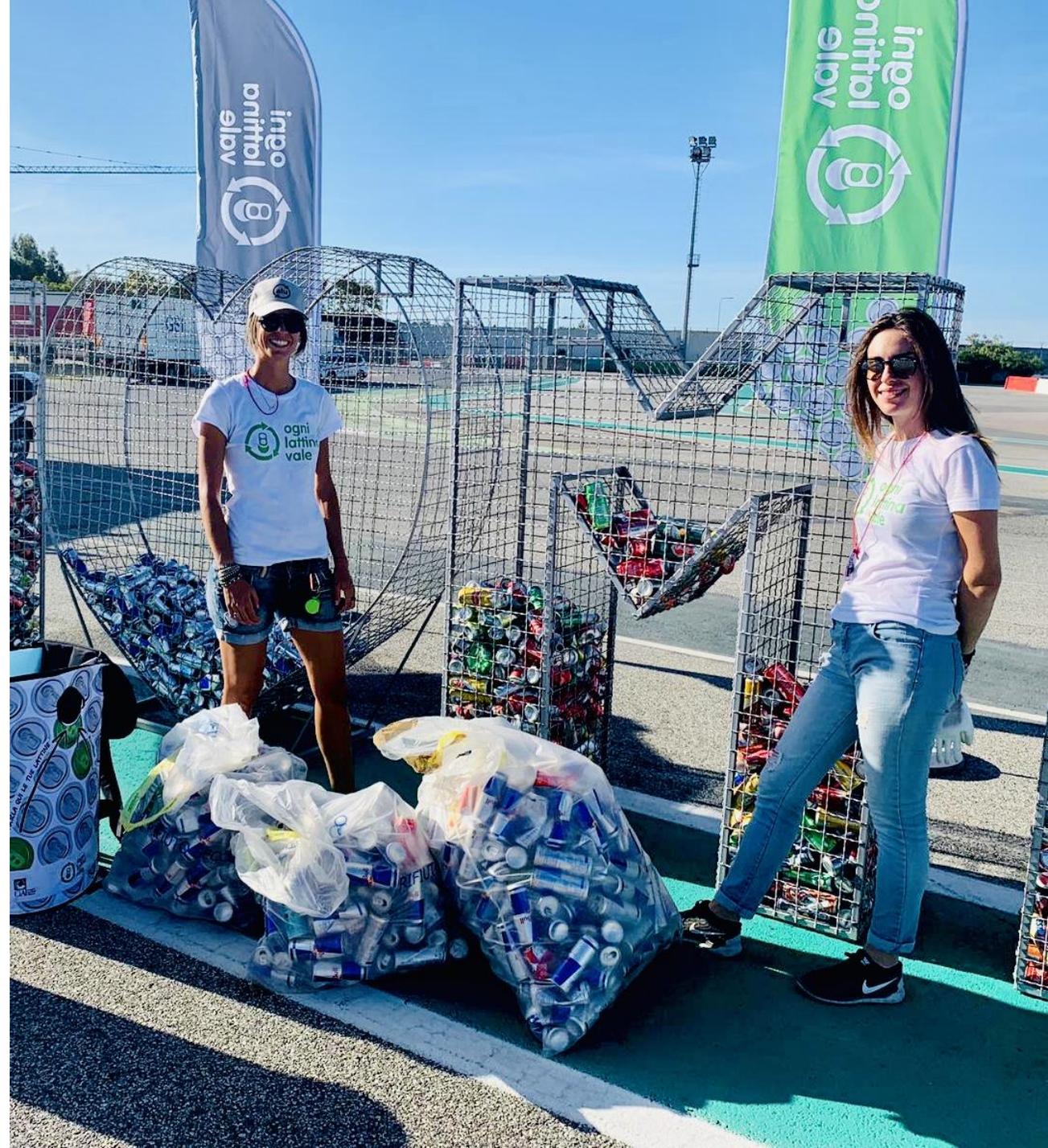
# PACKAGING EXPECTATIONS

Across markets, the majority of respondents say their purchase decisions are influenced by the recyclability of a packaging with the exception of the Netherlands and the Czech republic. Overall,

- 57% always check recycling label.
- 55% have stopped purchasing some products because of their packaging.

A majority think the most effective way to reduce the footprint of drinks packaging would be to recycle 100% of the packaging (55%), use biodegradable material (52%), make recycling bins more widely available (52%) and use a deposit scheme (51%).

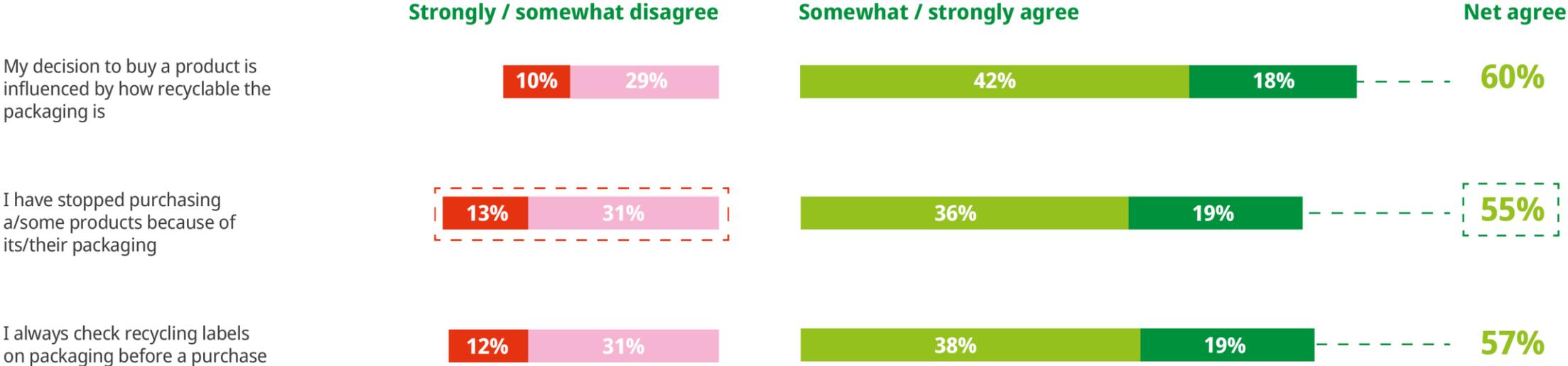
- Overall, '100% recyclable' is the most popular attribute for a green packaging in all countries but France.
- A majority of respondents (54%) say they prefer to use cans because they are easily recyclable.
- 2 in 3 respondents strongly agree that Companies should use packaging that is infinitely recyclable.



# PURCHASES INFLUENCED BY PACKAGING - OVERALL

The majority of respondents (60%) say their purchase decisions are influenced by the recyclability of a packaging, 57% always check recycling label and 55% have stopped purchasing some products because of their packaging.

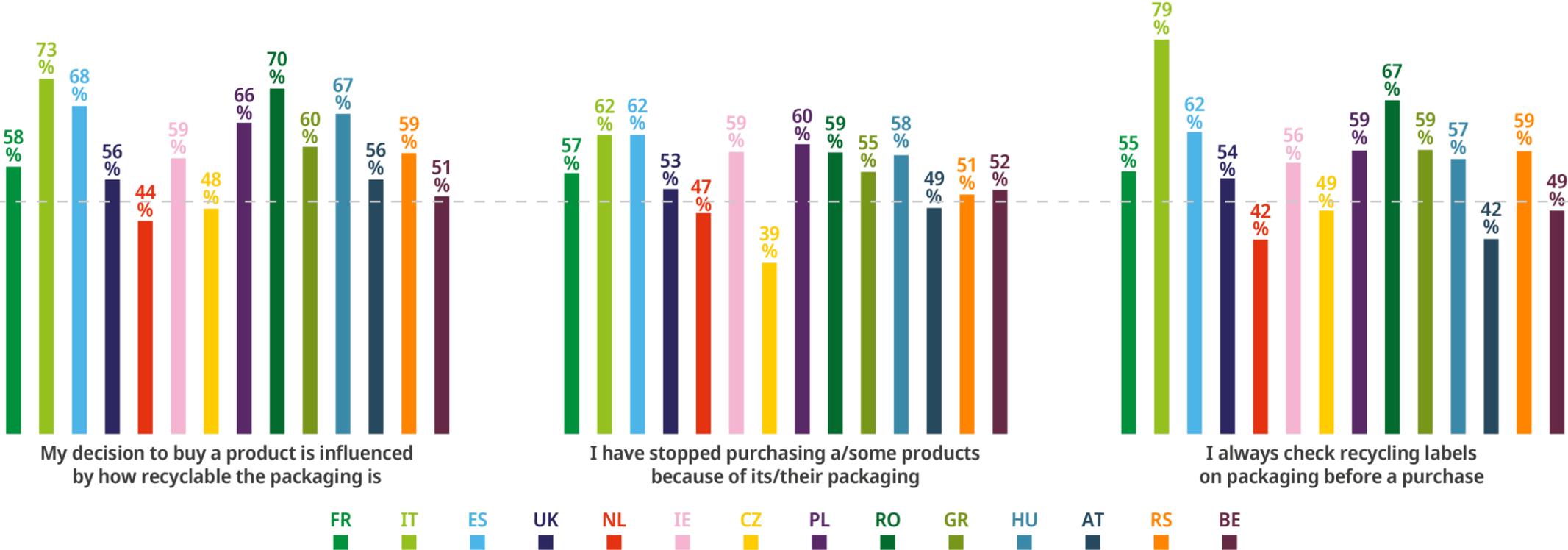
## Do you agree...



# PURCHASES INFLUENCED BY PACKAGING - OVERALL

A majority of respondents in France, Italy, Spain, the UK, Ireland, Poland, Romania, Greece, Hungary say that their purchase decisions are influenced by the recyclability of a packaging, that they always check recycling label and 55% have stopped purchasing some products because of their packaging. The Netherlands, Czech republic, Belgium, Serbia and Austria are more nuanced.

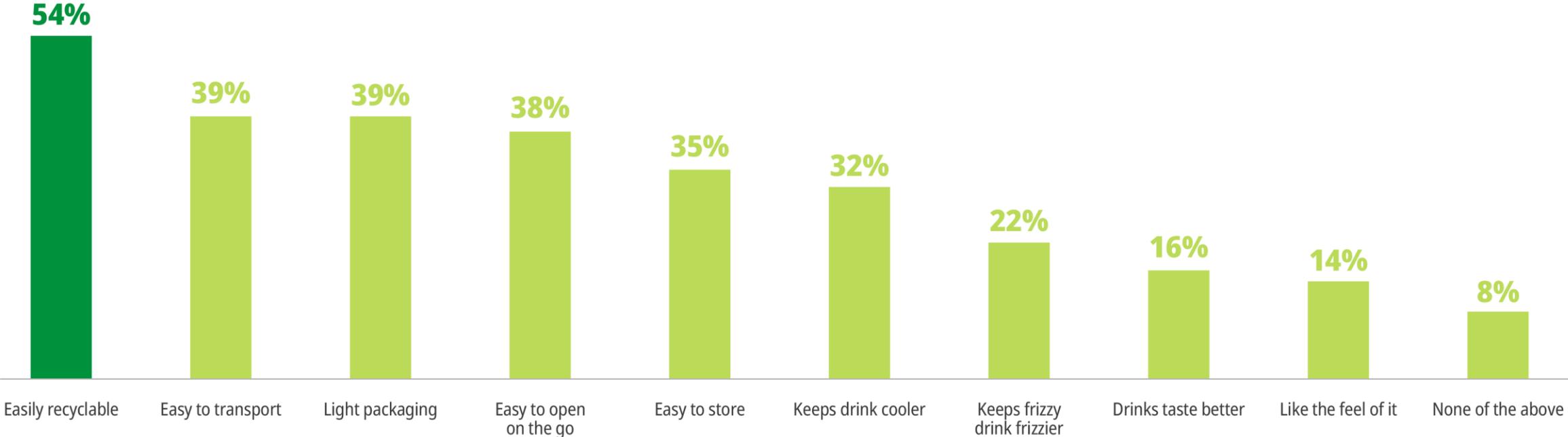
## To what extent do you agree or disagree that... (showing net agree)



# CANS PURCHASE DRIVERS - OVERALL

A majority of respondents (54%) say prefer to use cans because they are easily recyclable. Over a third also value that they have light packaging, are easy to transport, open on the go and store.

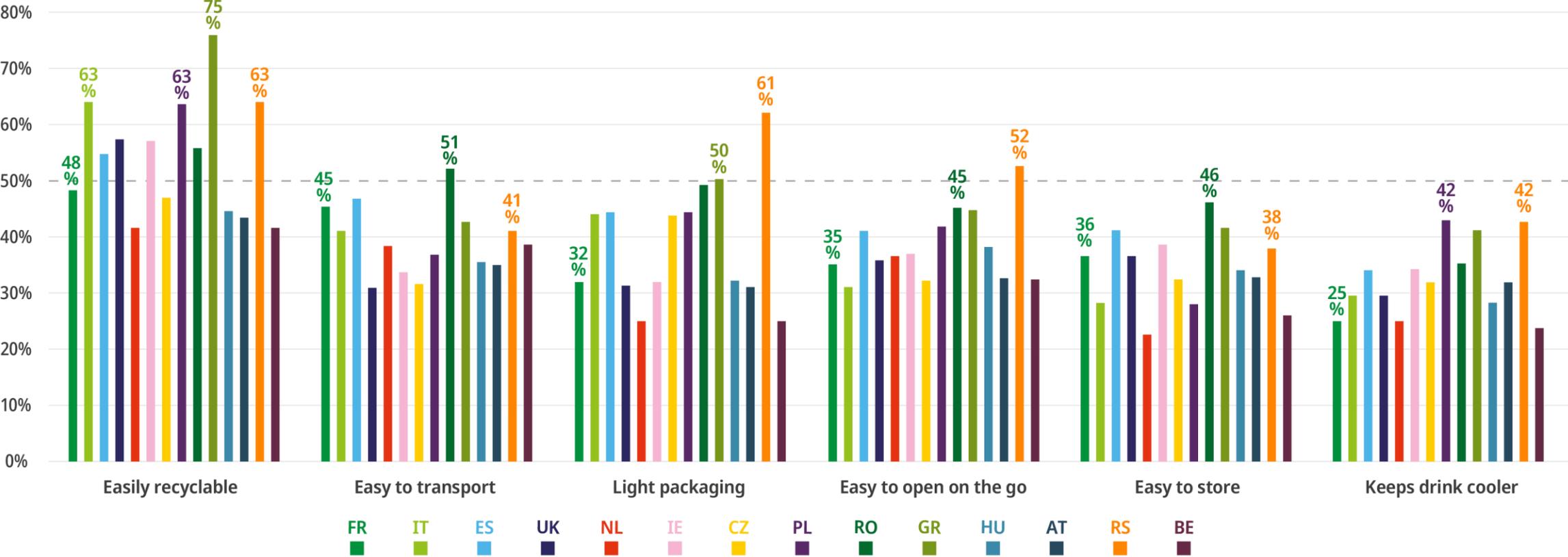
**What are some of the reasons you may prefer to use cans rather than other types of packaging for drinks?**  
(excludes 'other' <1%)



# CANS PURCHASE DRIVERS – BY COUNTRY

3 in 4 respondents in Greece say they prefer to use can because they are easily recyclable, just under 1 in 3 in Italy, Poland and Serbia say the same.

**What are some of the reasons you may prefer to use cans rather than other types of packaging for drinks?**  
(showing top 6)

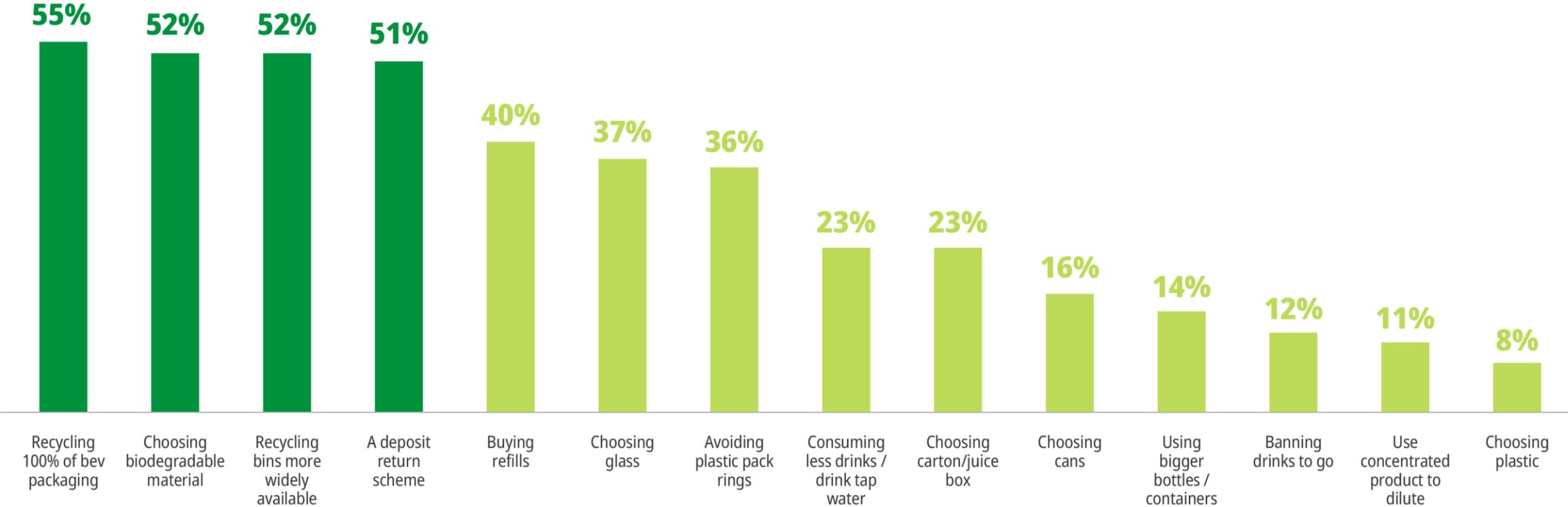


ECC 2020 – N:13,793  
FR:1,035 – IT: 1,042 – ES: 2,028 – UK: 1,518 – NL: 838 – IE: 769 – CZ: 801 – PL: 826 – RO: 830 – GR: 811 – HU: 842 – AT: 821 – RS: 795 – BE: 837

# REDUCING THE IMPACT OF DRINKS PACKAGING - OVERALL

A majority of respondents think the most effective way to reduce the footprint of drinks packaging would be to recycle 100% of the packaging (55%), use biodegradable material (52%), make recycling bins more widely available (52%) and use a deposit scheme (51%).

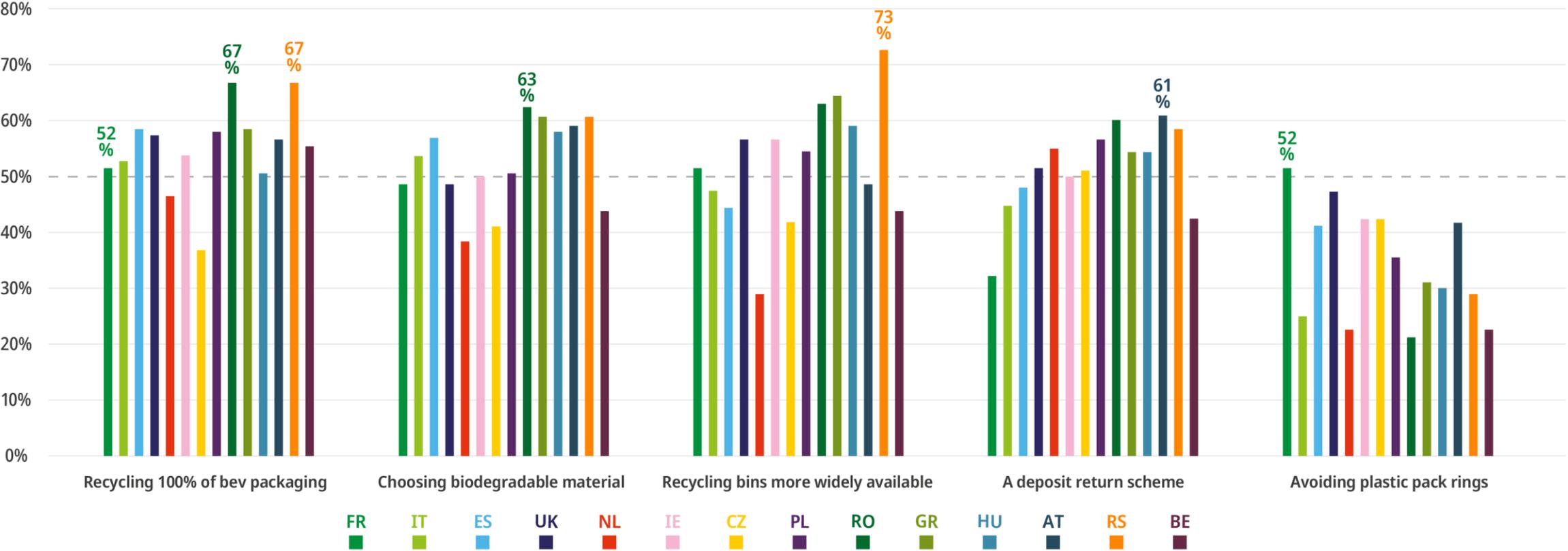
## What would be the most effective in reducing the environmental footprint of drinks packaging?



# REDUCING THE IMPACT OF DRINKS PACKAGING – BY COUNTRY

Respondents in Serbia are more likely to say that making recycling bins available would reduce the environmental footprint of drinks packaging : 73% chose it as one of the most impactful measures. Austria see a deposit scheme as most effective and respondents France see 'avoiding plastic pack rings' as more impactful than any other nation (on par with recycling 100% of beverage packaging at 52%).

## What would be the most effective in reducing the environmental footprint of drinks packaging? (showing all > 50%)

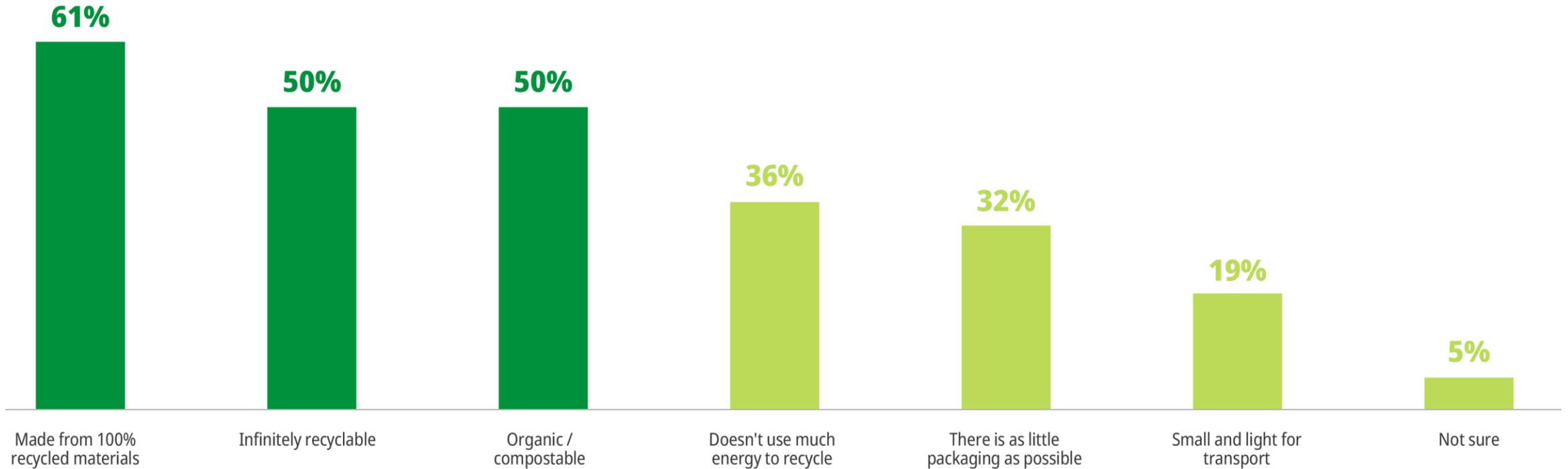


ECC 2020 – N:13,793  
FR:1,035 – IT: 1,042 – ES: 2,028 – UK: 1,518 – NL: 838 – IE: 769 – CZ: 801 – PL: 826 – RO: 830 – GR: 811 – HU: 842 – AT: 821 – RS: 795 – BE: 837

# ATTRIBUTES OF A SUSTAINABLE PACKAGING - OVERALL

A majority of respondents think a sustainable packaging is made from 100% recyclable material, infinitely recyclable and organic or compostable. About a third say it doesn't use much energy to recycle and uses as little packaging as possible..

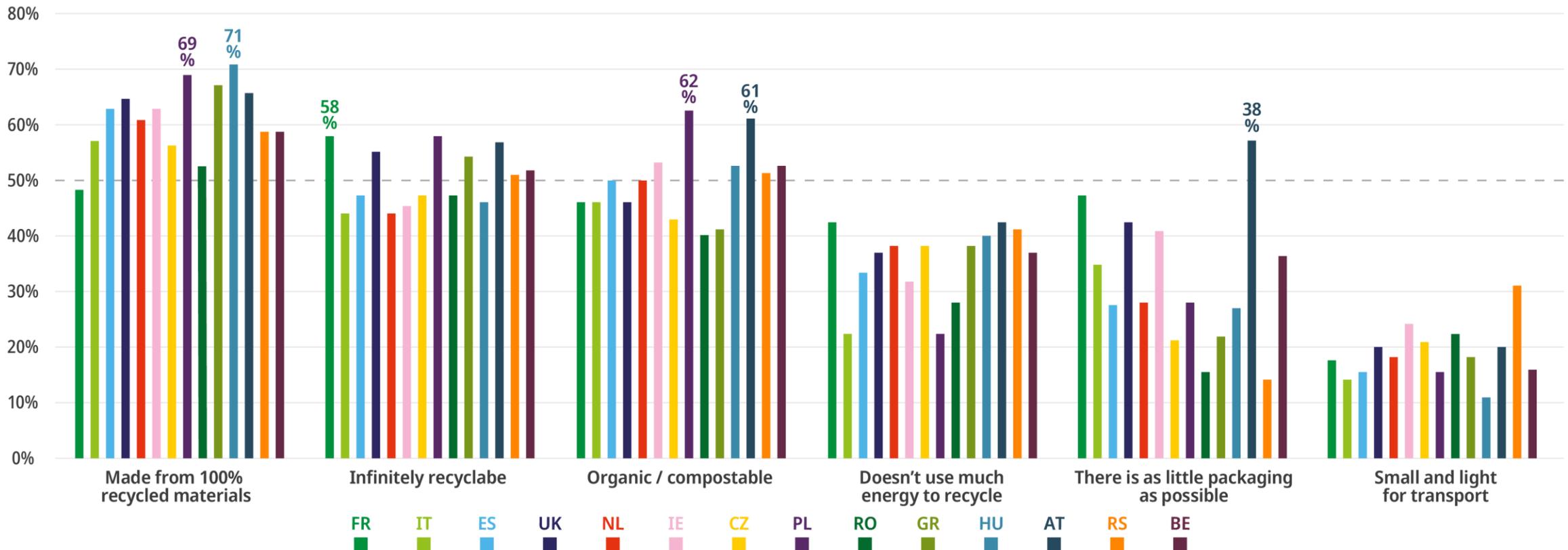
## What makes a packaging sustainable? (excludes not sure on the above and other)



# ATTRIBUTES OF A SUSTAINABLE PACKAGING – BY COUNTRY

Overall, '100% recyclable' is the most popular attribute all countries but France, with 7 in 10 respondents in Hungary saying a sustainable packaging is made of 100% recyclable materials while respondents in France favour a packaging that is infinitely recyclable. This attribute being also popular in Poland. Austria over indexes on 'as little packaging as possible' compared to other countries (4th place and on par with 'infinitely recyclable').

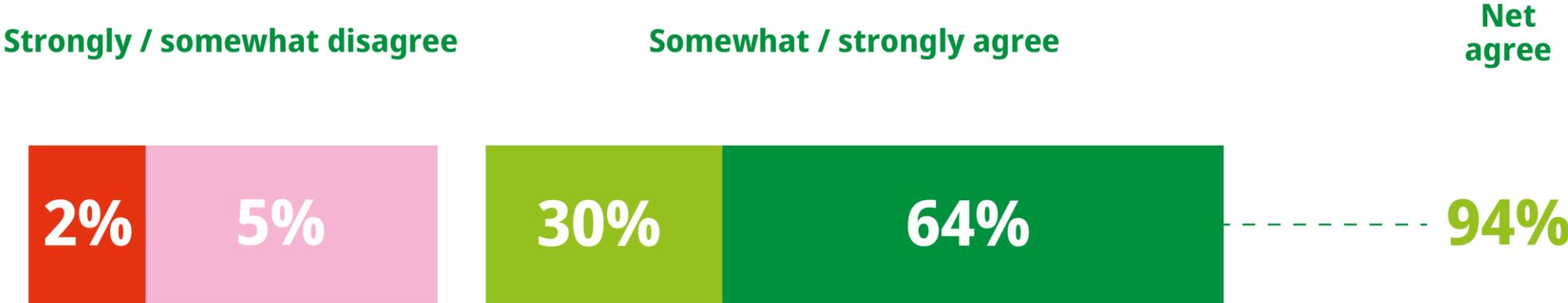
## What makes a packaging sustainable? (excludes not sure on the above and other)



# INFINITELY RECYCLABLE PACKAGING - OVERALL

About 2 in 3 respondents strongly agree that Companies should use packaging that is infinitely recyclable.

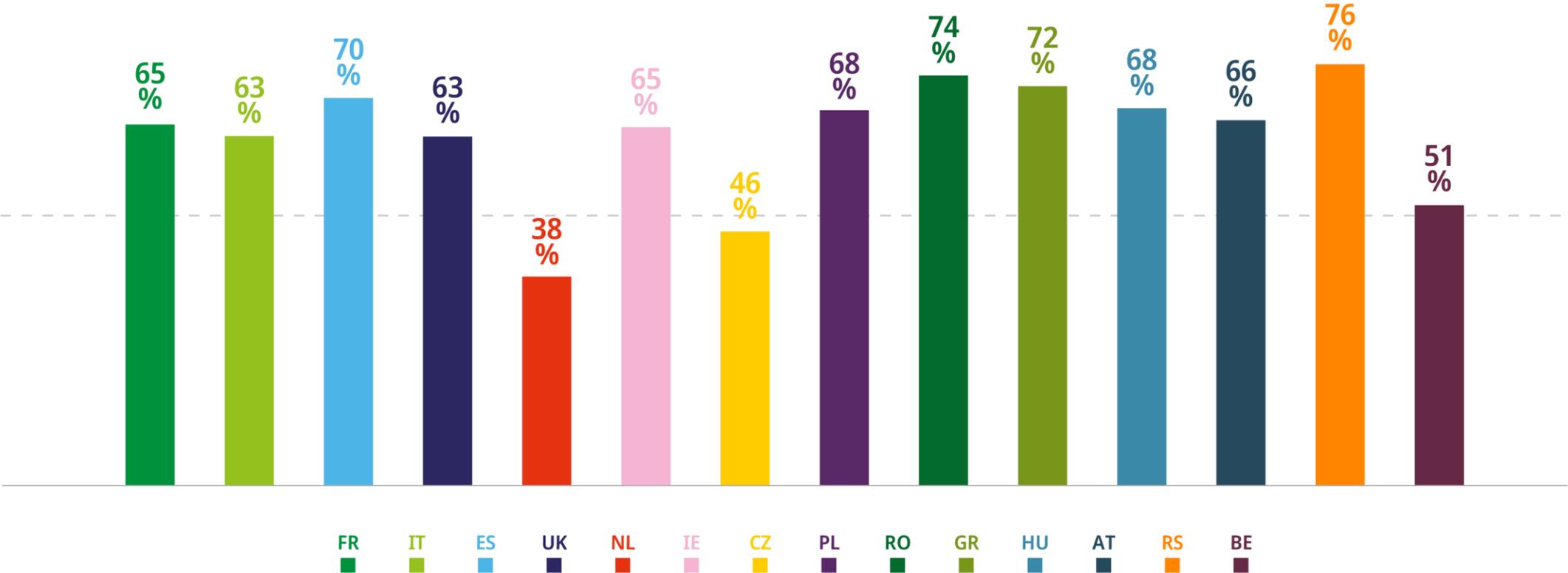
**To what extent do you agree or disagree that Companies should use packaging that is infinitely recyclable**



# VIEWS ON RECYCLING – BY COUNTRY

A majority of respondents from all countries strongly agree that Companies should use a packaging that is infinitely recyclable with the exception of the Netherlands and the Czech Republic.

**To what extent do you agree or disagree that Companies should use a packaging that is infinitely recyclable (showing strongly agree)**

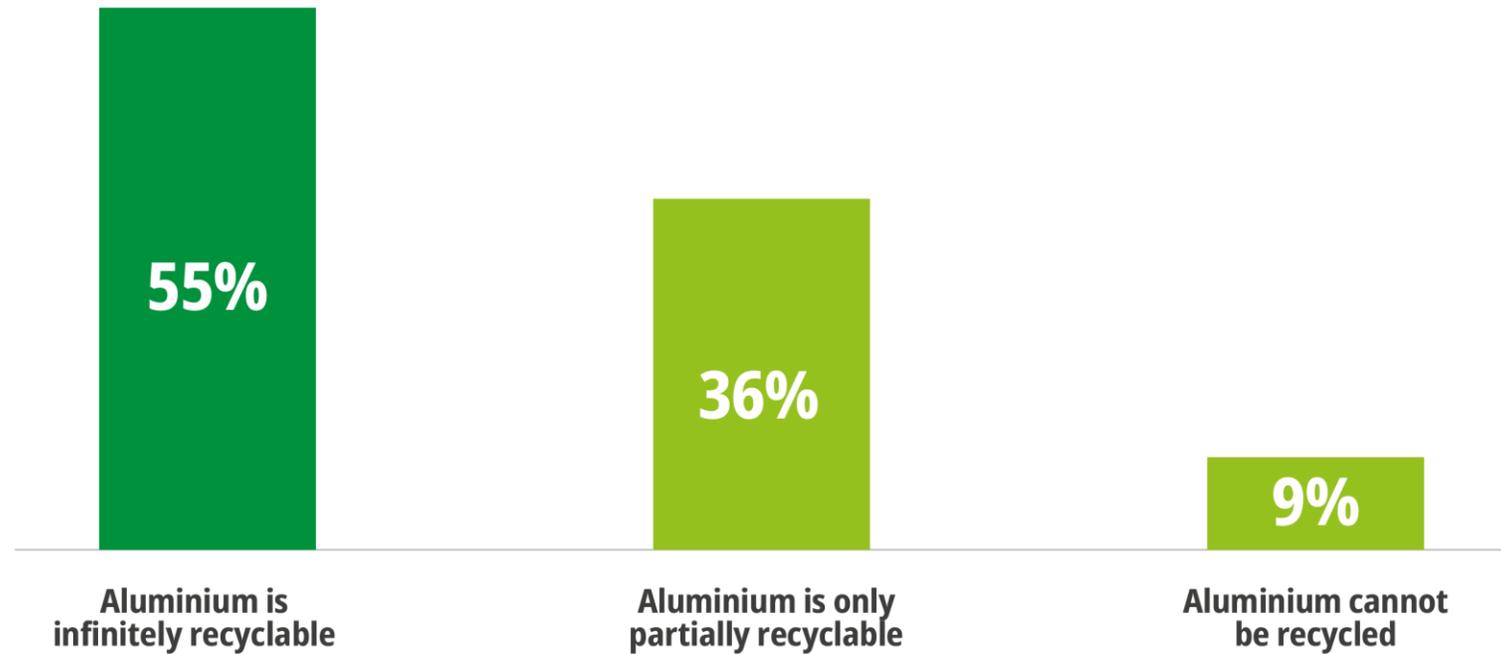


ECC 2020 – N:13,793  
FR:1,035 – IT: 1,042 – ES: 2,028 – UK: 1,518 – NL: 838 – IE: 769 – CZ: 801 – PL: 826 – RO: 830 – GR: 811 – HU: 842 – AT: 821 – RS: 795 – BE: 837

# ALUMINIUM IS INFINITELY RECYCLABLE - OVERALL

55% of all respondents correctly state that aluminium is infinitely recyclable, while 36% say it is only partially recyclable.

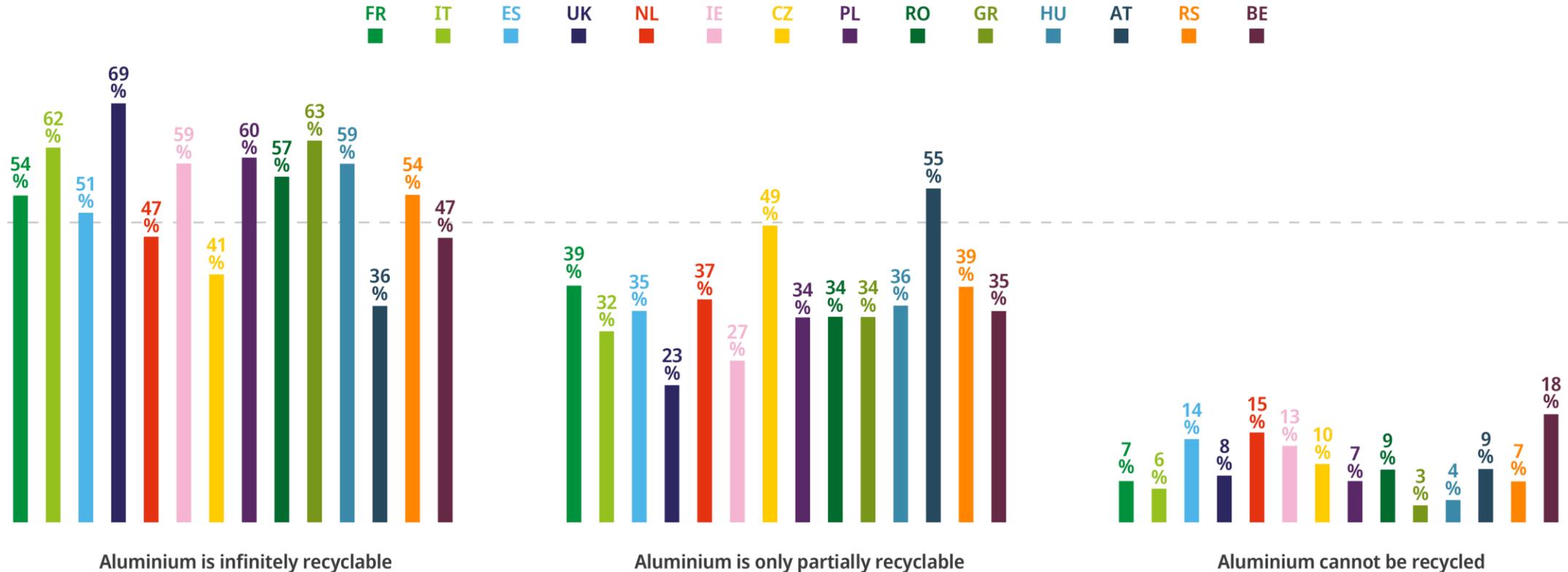
**In your opinion, which of the following statement is most accurate?**



# ALUMINIUM IS INFINITELY RECYCLABLE – BY COUNTRY

A majority in all countries correctly identify that aluminium is infinitely recyclable, with the exception of the Netherlands, the Czech Republic, Austria and Belgium.

**In your opinion, which of the following statement is most accurate?**

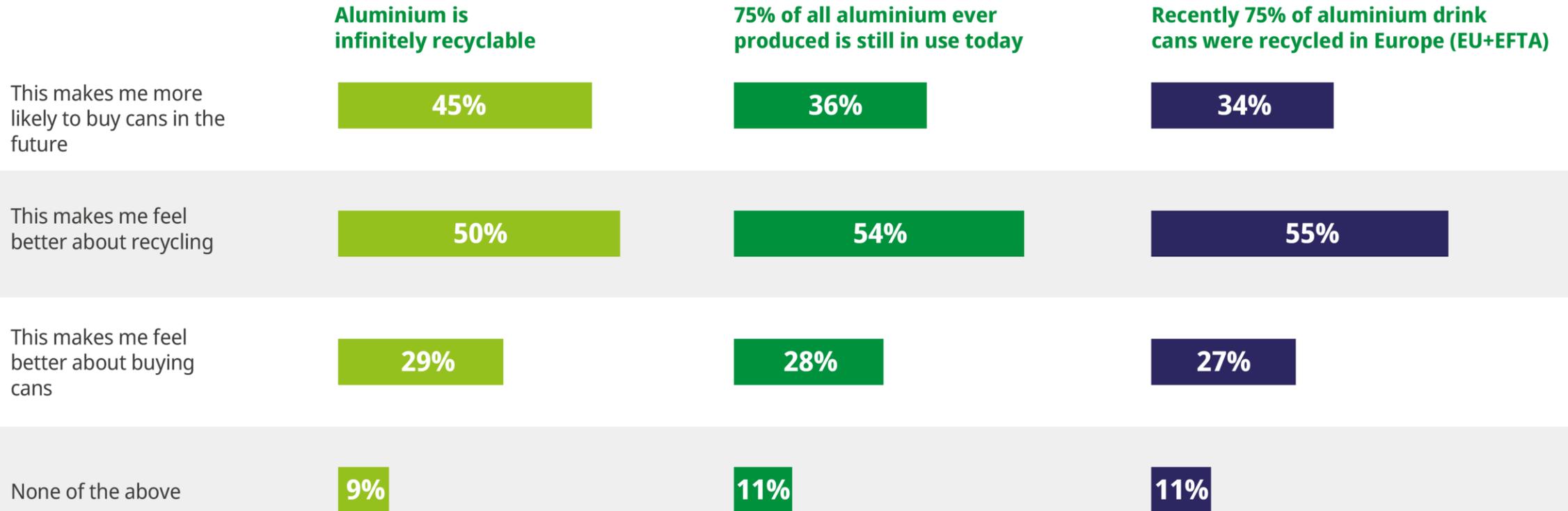


# MESSAGING IMPACT - OVERALL

All statements tested would make a majority of respondents feel better about recycling.

'Aluminium is infinitely recyclable' is the statement most likely to make respondents want to buy more cans in the future.

**We will now show you a couple of statements on aluminium drink cans that have been verified to be true. For each, please indicate how this may impact you. (multiple choice allowed)**



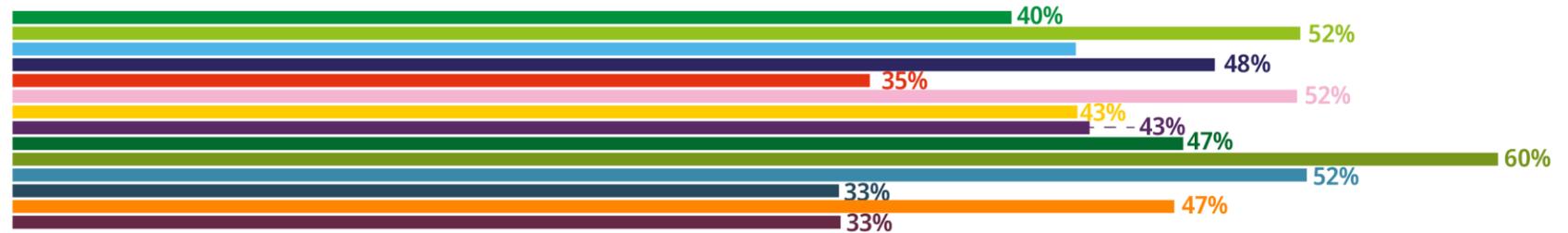
# MESSAGING IMPACT ALUMINIUM IS INFINITELY RECYCLABLE - BY COUNTRY

Respondents in Greece are the most responsive the message 'aluminium is infinitely recyclable' with 60% saying it make them more likely to buy cans in the future and 56% saying it makes them feel better about recycling. Poland, Romania, Hungary and Serbia have a more tepid response.

We will now show you a couple of statements on aluminium drink cans that have been verified to be true. For each, please indicate how this may impact you. (multiple choice allowed) :

**Aluminium is infinitely recyclable**

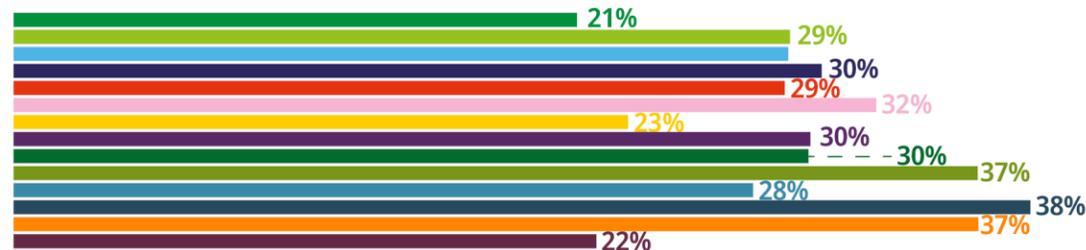
This makes me more likely to buy cans in the future.



This makes me feel better about recycling.



This makes me feel better about buying cans



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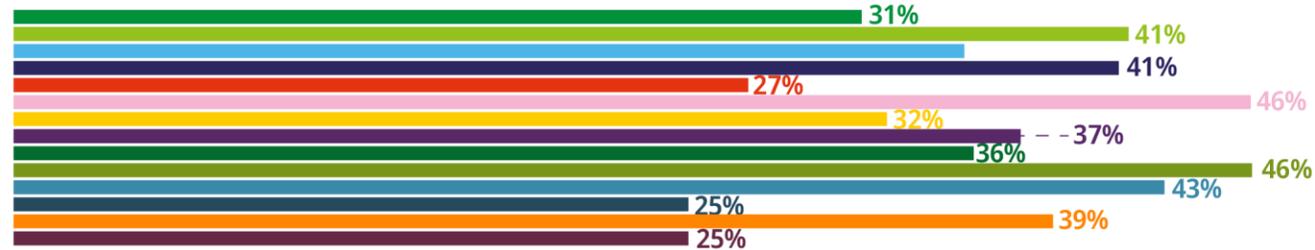
# MESSAGING IMPACT 75% OF ALL ALUMINIUM PRODUCED IS STILL IN USE - BY COUNTRY

3 in 5 respondents in France, the Netherlands and Greece say the statement makes them feel better about recycling. Across the 3 statements tested, 75% of all aluminium produced is still in use triggers the most positive response from respondents in the Netherlands.

We will now show you a couple of statements on aluminium drink cans that have been verified to be true. For each, please indicate how this may impact you. (multiple choice allowed) :

**Aluminium is infinitely recyclable**

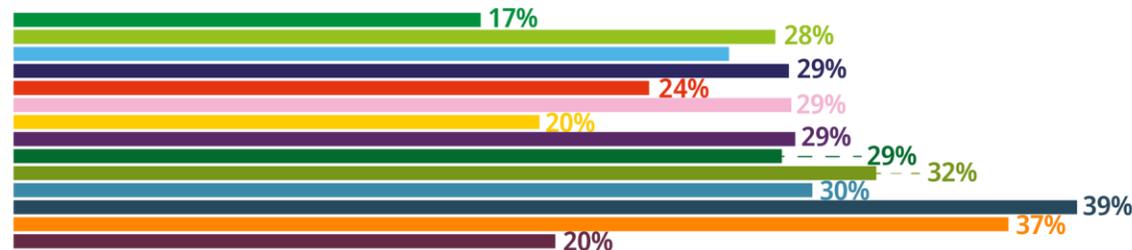
This makes me more likely to buy cans in the future.



This makes me feel better about recycling.



This makes me feel better about buying cans



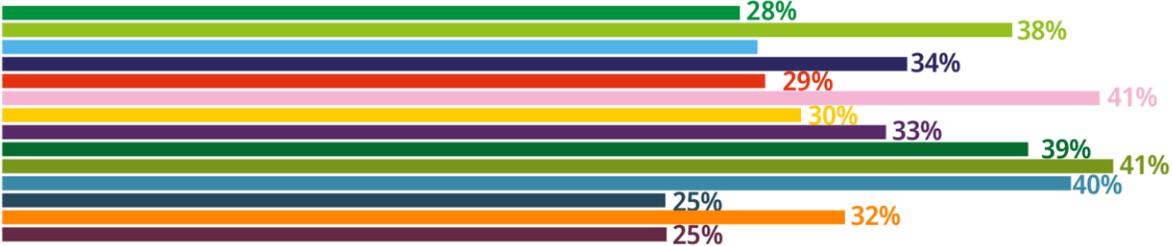
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# MESSAGING IMPACT 75% OF ALUMINIUM DRINK CANS RECYCLED IN EUROPE - BY COUNTRY

A majority of respondents across markets say the statement makes them feel better about recycling, with the exception of the Czech Republic, Hungary and Serbia.

We will now show you a couple of statements on aluminium drink cans that have been verified to be true. For each, please indicate how this may impact you. (multiple choice allowed) : **75% of aluminium drink cans recycled in Europe**

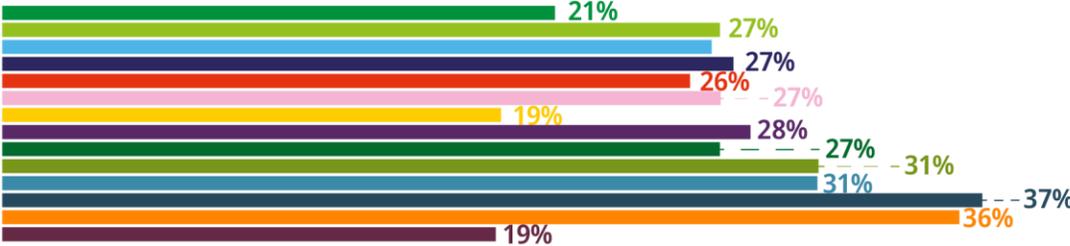
This makes me more likely to buy cans in the future.



This makes me feel better about recycling.



This makes me feel better about buying cans



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- BE

THANK  
YOU



# APPENDIX

BACKGROUND

SUMMARY

DETAILED FINDINGS

APPENDIX

Sample structure:

Gender

Age

City size

# SAMPLE STRUCTURE: GENDER

	TOTAL	FR	IT	ES	UK	NL	IE	CZ	PL	RO	GR	HU	AT	RS	BE
Male	48%	48%	47%	48%	48%	49%	46%	50%	47%	50%	48%	49%	49%	49%	46%
Female	51%	51%	52%	51%	51%	49%	52%	48%	52%	49%	50%	50%	50%	48%	53%
Self-describe	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%
Prefer not to say	1%	1%	0%	1%	0%	1%	2%	1%	1%	1%	2%	1%	1%	3%	1%

# SAMPLE STRUCTURE: AGE

	TOTAL	FR	IT	ES	UK	NL	IE	CZ	PL	RO	GR	HU	AT	RS	BE
Gen Z (16-24)	19%	17%	17%	17%	14%	18%	28%	23%	19%	19%	23%	19%	19%	22%	19%
Millennials (25-39)	26%	23%	23%	25%	22%	25%	35%	29%	26%	26%	30%	26%	26%	33%	26%
Gen X (40-54)	26%	25%	25%	26%	24%	25%	24%	27%	25%	26%	29%	25%	26%	29%	24 %
Baby Boom. (55-74)	26%	29%	28%	30%	28%	29%	12%	21%	28%	28%	18%	29%	25%	16%	28 %
Silent Gen. (75+)	4%	7%	8%	3%	12%	3%	1%	0%	2%	1%	0%	1%	3%	0%	3 %

# SAMPLE STRUCTURE: CITY SIZE

	TOTAL	FR	IT	ES	UK	NL	IE	CZ	PL	RO	GR	HU	AT	RS	BE
A town or small city (1,001 to 100,000 people)	41%	53%	56%	36%	49%	50%	39%	40%	38%	29%	21%	41%	36%	34%	49%
A city (100,000 to 1 million people)	31%	17%	21%	42%	27%	36%	28%	29%	36%	43%	36%	20%	20%	36%	28%
A metropolis (more than 1 million people)	18%	11%	16%	19%	9%	9%	13%	17%	11%	21%	38%	26%	28%	24%	14 %
A village / rural (1,000 people or less)	11%	19%	7%	3%	15%	6%	20%	13%	15%	7%	5%	13%	17%	5%	9 %