



RECYCLING HABITS AND ATTITUDE IN EUROPE 2022

**Delivered by Made with Insight
For Every Can Counts**

09/05/2022

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CONTEXT

Following the success of the 2020 campaign, **Every Can Counts** (ECC) has commissioned research in Europe into people's behaviours and attitudes on recycling. This will serve to support this year's PR and marketing efforts.

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 has access to the full data tables (at an overall European level) for any queries. 2020 data is also available upon request.

OBJECTIVES

- Understand and compare current recycling habits
- Identify any barriers and motivations to recycling more, especially in public spaces and during public events
- Assess knowledge around recyclability, and specifically around aluminium drink cans recycling
- Understand what key messages and information around aluminium recycling may most resonate with citizens

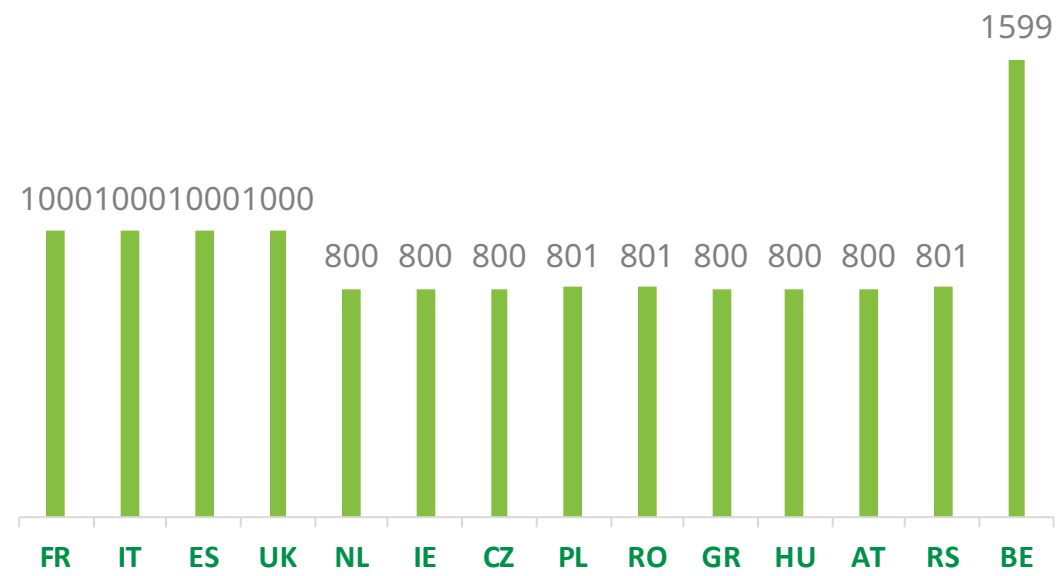
METHODOLOGY

- 10 minute online survey
- Fieldwork ran from 28/03/2022 to 05/04/2022
- 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 this is 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

12,802
RESPONDENTS IN TOTAL

Breakdown per market as follows:



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EXECUTIVE SUMMARY

- **Over 9 in 10 Europeans surveyed said protecting the environment* and recycling is important. However the vast majority say not enough is being done to address these challenges. Recycling is difficult, consumers in Europe need help.**
 - Just 52% always recycle at home and recycling rates drop dramatically when out of the home. Respondents want to see more recycling in public areas (52%).
 - 2 in 3 see initiatives around reducing waste and encouraging individuals to recycle as necessary to protect the environment.
 - To support recycling efforts, a majority would like to see their country use only 100% recyclable packaging. Deposit return schemes are also popular (for 50% of respondents).
- **There is a sense of individual responsibility, but the onus is first and foremost on companies to improve the recyclability of their packaging.**
 - About 9 in 10 say companies should be held responsible for the packaging they use and only use packaging that is fully recyclable. Comparatively under 7 in 10 say consumers should be held responsible for the packaging they buy.
 - 87% also say companies should only use packaging that is infinitely recyclable.
 - 51% want to see companies discouraged from using products that damage the environment (via tax or otherwise) , and 48% want to see them discouraged from using hard to recycle packaging.
- **More could be done to educate consumers who know little about the recyclability of cans and rarely appreciate the role of transportation in sustainability**
 - This time again, many feel inadequately informed about the reality of recycling and express the willingness to know more, especially about how much of the waste is actually being recycled or what happens to the waste.
 - Glass packaging is seen as most recyclable (especially for older generations) while only 19% say ‘small and light to transport’ make a packaging sustainable.
 - There is room to inform and shape opinion: telling consumers that plastic cannot be recycled infinitely or talking about the benefit of a lighter packaging has a positive impact on perception and preference for cans.
- **A note on gender and age: generally female respondents and older generations (aside from Silent) tend to show more concern and support more environmental measures (please refer to table for analysis).**

DETAILED FINDINGS

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The detailed findings are broken down into 3 sections

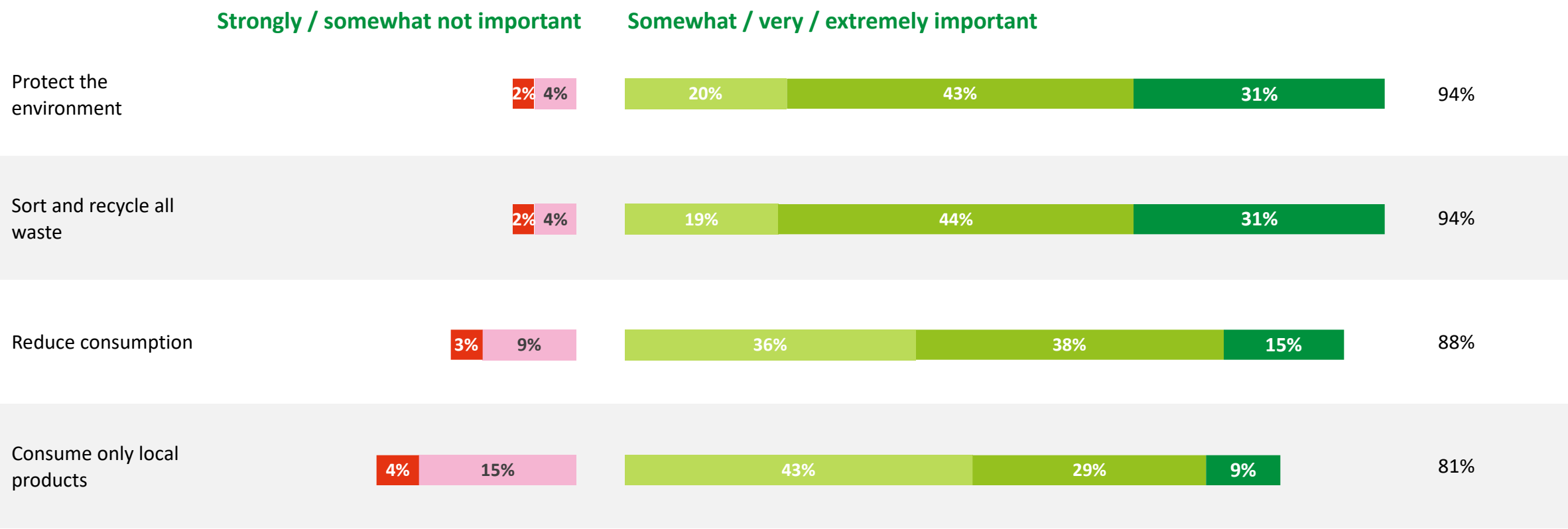
- 1- Key issues
- 2- The role of packaging
- 3- Brand and coms

CONTEXT & KEY ISSUES

IMPORTANCE OF KEY ISSUES - OVERALL

A vast majority of respondents agree that protecting the environment, sorting and recycling all waste, reducing consumption and consuming only local products is important; with almost a third saying protecting the environment and sorting and recycling all waste is extremely important. Consuming only local products is comparatively less of a priority for consumers. While the overall findings remain consistent across gender and age, female respondents are more likely to say these issues are important (significant over-index on all statements). Importance generally also increases with age (except for the Silent generation) with Gen Z under-indexing on all statements (see tables for details).

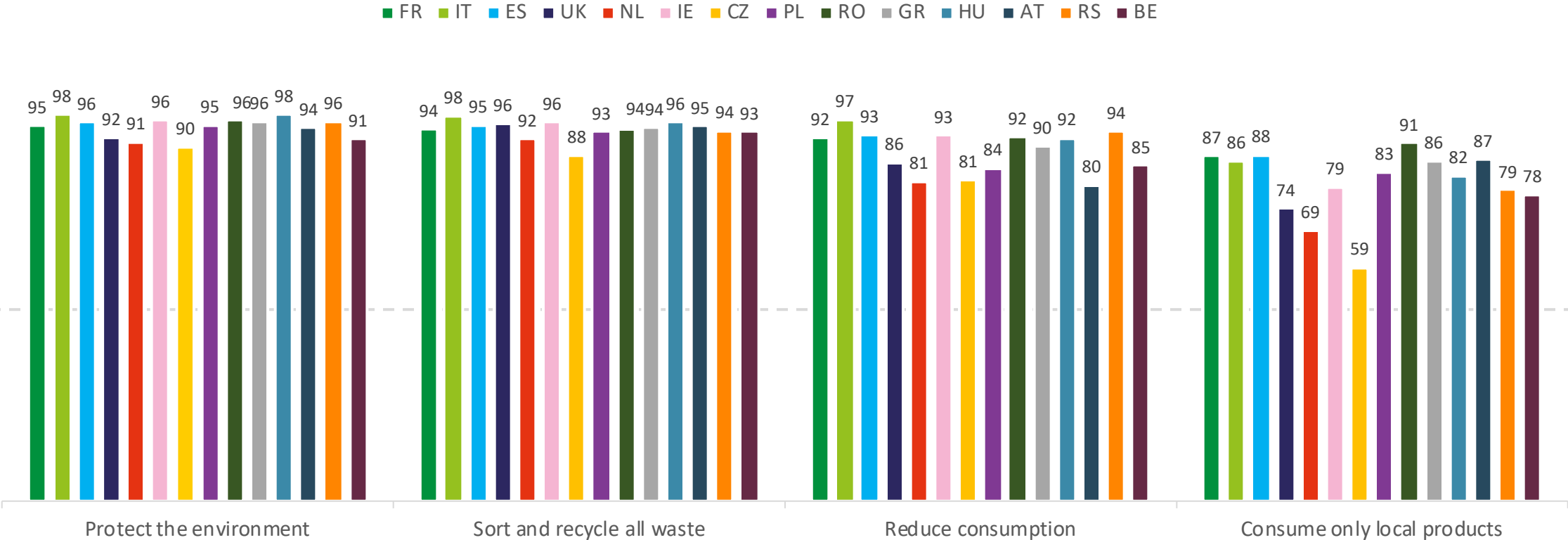
How important are the following to you



IMPORTANCE OF KEY ISSUES – BY COUNTRY, TOP 3 BOX

Across all countries, a vast majority of respondents find all 4 issues around environment, recycling, reducing consumption and consuming local products important. The UK, the Netherlands and the Czech Republic score lowest on 'consuming local products'.

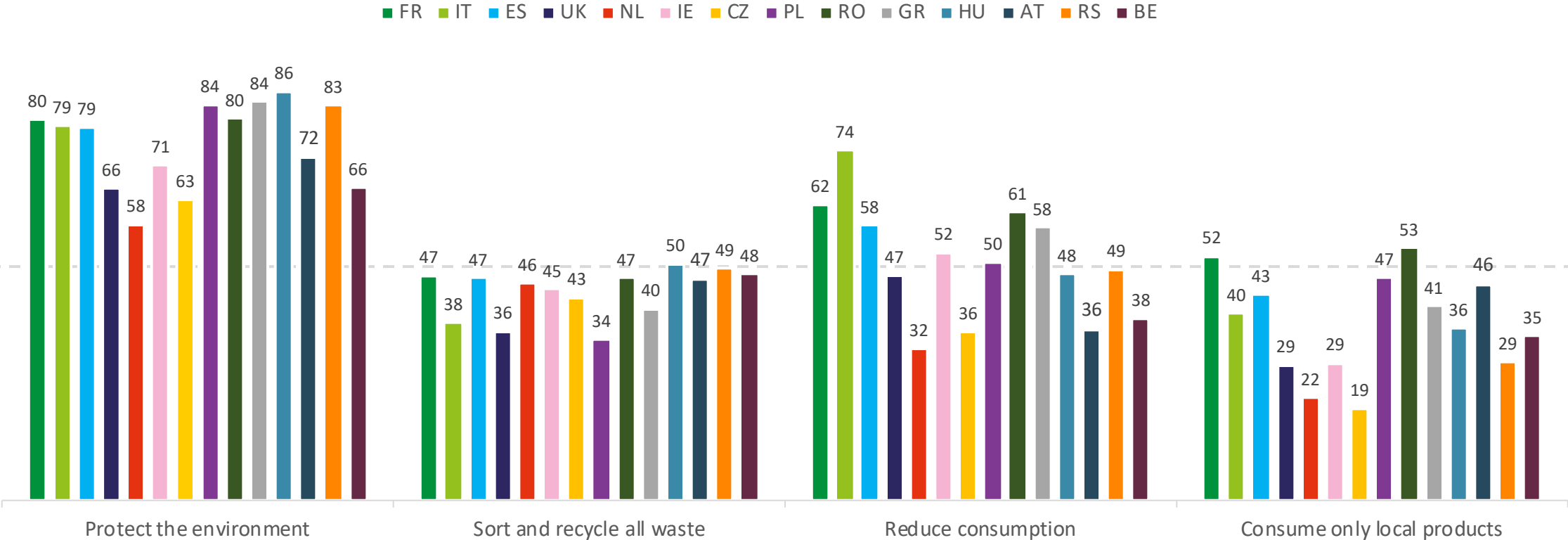
To what extent do you agree or disagree, in percentage
Showing percentages, net important (top 3 box)



IMPORTANCE OF KEY ISSUES – BY COUNTRY, TOP 2 BOX

When looking at the top 2 boxes, ‘very/extremely’ some differences between issues and countries start to emerge: protecting the environment is the key issue for most with recycling taking a step back. Italy also scoring high on reducing consumption, along with France, Romania, Spain, Greece and Ireland. France and Romania are most likely to see consuming locally as important. *When reporting these numbers, very/extremely’ can be grouped as ‘very’ to simplify the language.*

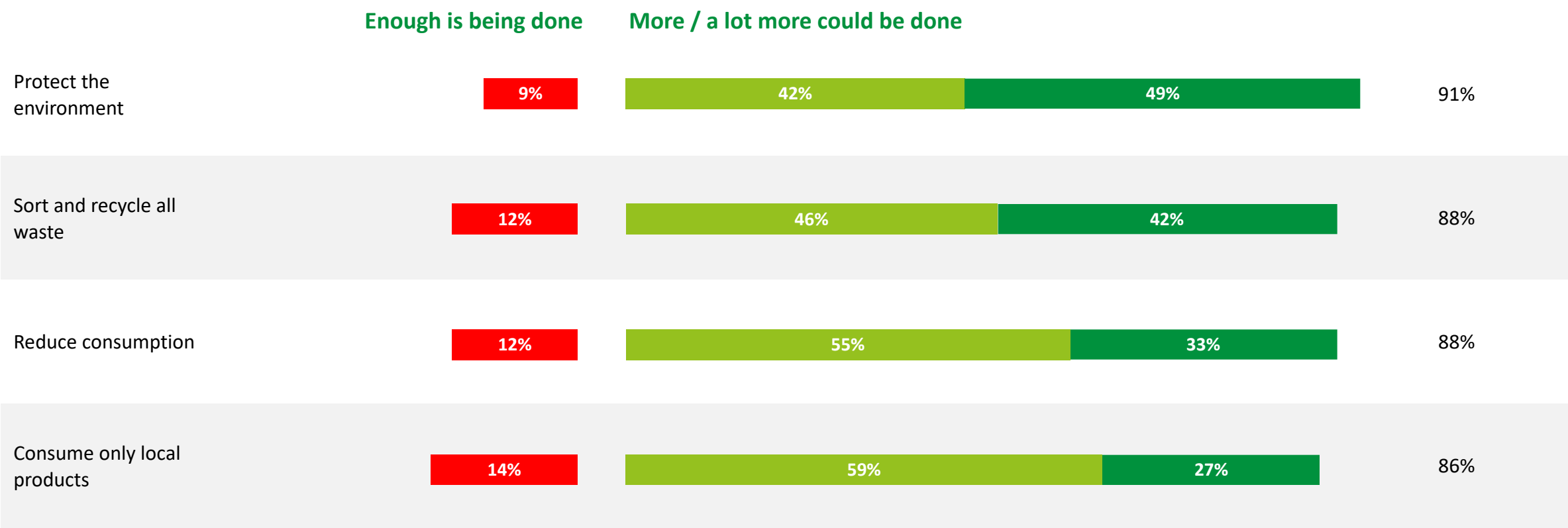
To what extent do you agree or disagree
Showing percentages, net very/extremely important (top 2 box)



WHAT NEEDS TO BE DONE ABOUT KEY ISSUES

The vast majority of respondents say that more could be done to protect the environment, sort and recycling all waste, reduce consumption and consume only local products is important. About half say a lot more could be done to protect the environment. Consistent with data around importance of issues, women are more likely to say that more could be done (e.g.: more could be done to protect the environment F:51%, M:47%). Some significant differences can also be observed across generations, Gen Z respondents in particular are more likely to say that enough is being done as it is.

Do you think enough is being done or more could be done to...

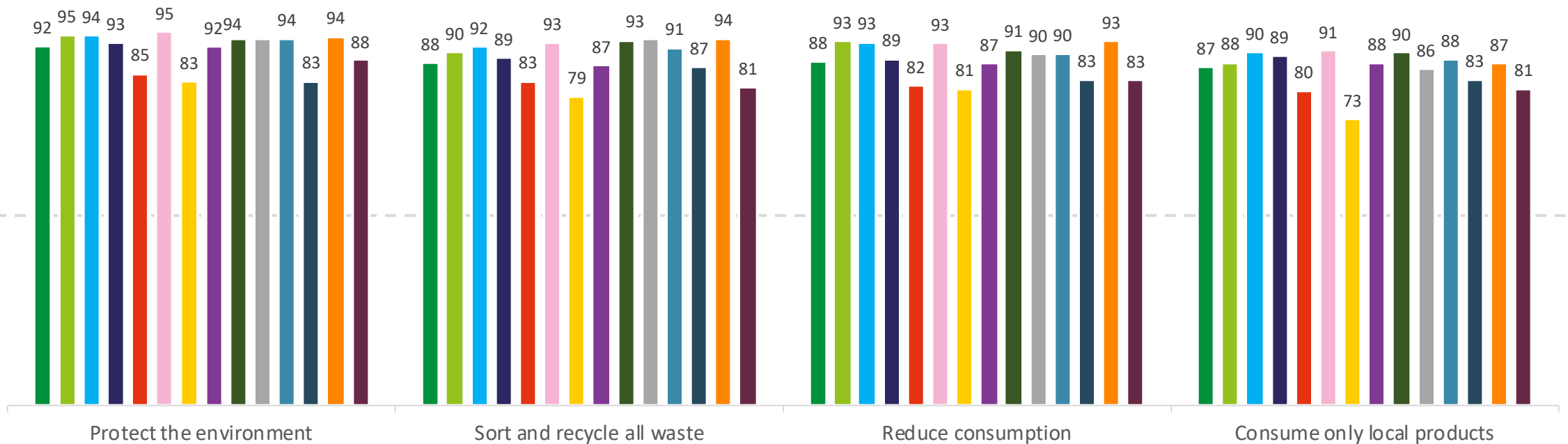


WHAT NEEDS TO BE DONE ABOUT KEY ISSUES – BY COUNTRY

Across all countries, a vast majority of respondents say more could be done for the environment, recycling, reducing consumption and consuming local products.

Do you think enough is being done or more could be done to...
Showing percentages, net more/a lot more could be done

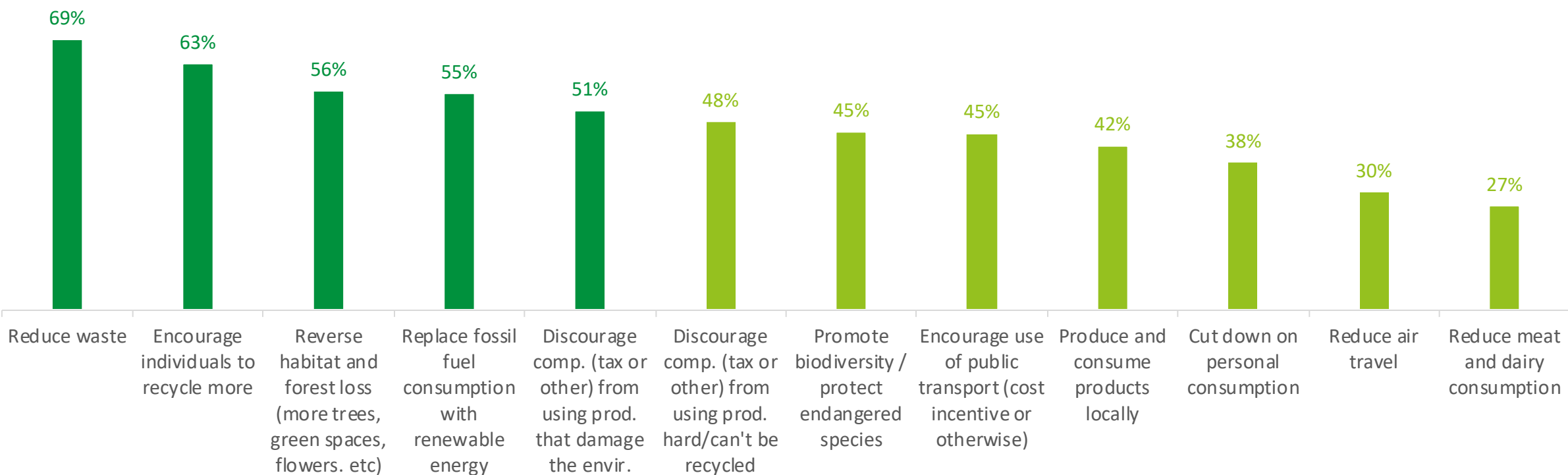
FR IT ES UK NL IE CZ PL RO GR HU AT RS BE



INITIATIVES NECESSARY TO PROTECT THE ENVIRONEMENT- OVERALL

Amongst the proposed initiatives to protect the environment, a majority say reducing waste, encouraging individuals to recycle more, reversing habitat loss, replacing fossil fuel and discouraging companies (through tax or otherwise) from using products that damage the environment are all necessary. Reducing air travel along with meat and dairy consumption appear necessary to less than a third. Boomers are more likely to see all initiatives as important while Gen Z under-index on all statements (see tables for details).

Which of the following initiatives are necessary to protect the environment?

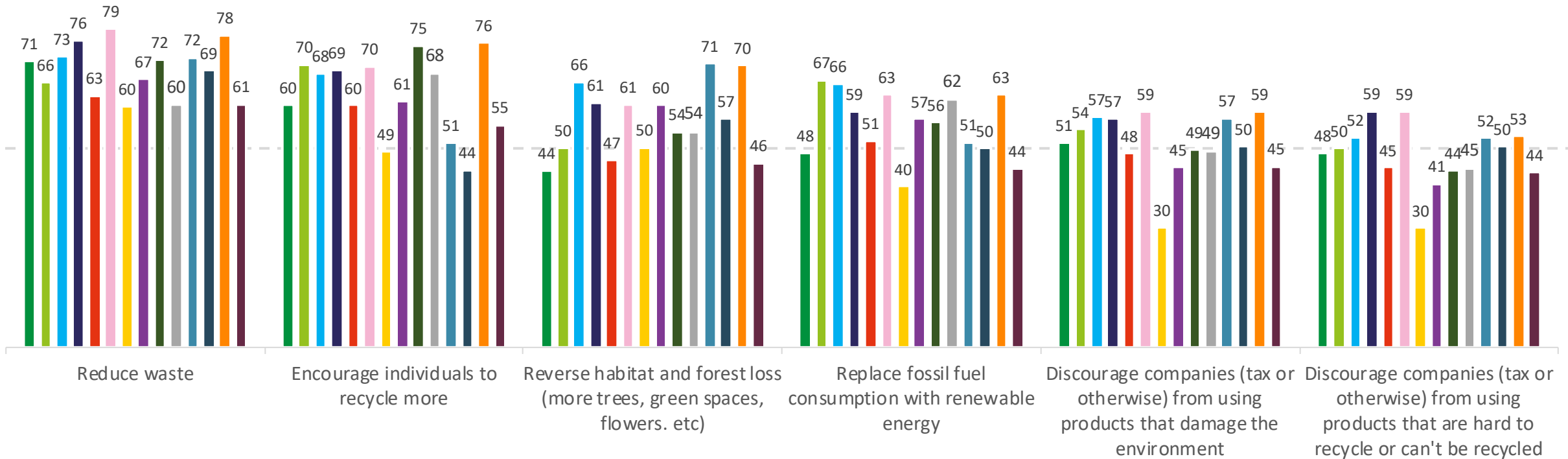


INITIATIVES NECESSARY TO PROTECT THE ENVIRONEMENT – BY COUNTRY

In Italy, both encouraging individuals to recycle more and replacing fossil fuel come before reducing waste.

Which of the following initiatives are necessary to protect the environment?
Showing percentages, overall top 6

FR IT ES UK NL IE CZ PL RO GR HU AT RS BE



INITIATIVES NECESSARY TO PROTECT THE ENVIRONEMENT – BY COUNTRY

In Italy, Romania and Greece encouraging individuals to recycle more comes before reducing waste.

Which of the following initiatives are necessary to protect the environment? (as per tables)

	FR	IT	ES	UK	NL	IE	CZ	PL	RO	GR	HU	AT	RS	BE
Reduce waste	71%	66%	73%	76%	63%	79%	60%	67%	72%	60%	72%	69%	78%	61%
Encourage individuals to recycle more	60%	70%	68%	69%	60%	70%	49%	61%	75%	68%	51%	44%	76%	55%
Reverse habitat and forest loss (more trees, green spaces, flowers. etc)	44%	50%	66%	61%	47%	61%	50%	60%	54%	54%	71%	57%	70%	46%
Replace fossil fuel consumption with renewable energy	48%	67%	66%	59%	51%	63%	40%	57%	56%	62%	51%	50%	63%	44%
Discourage comp (tax or other) from using products that damage the env.	51%	54%	57%	57%	48%	59%	30%	45%	49%	49%	57%	50%	59%	45%
Discourage comp (tax or other) from using products hard/can't be recycled	48%	50%	52%	59%	45%	59%	30%	41%	44%	45%	52%	50%	53%	44%
Promote biodiversity / protect endangered species	46%	48%	56%	50%	37%	53%	38%	45%	48%	46%	43%	38%	49%	40%
Encourage use of public transport (cost incentive or otherwise)	40%	44%	55%	49%	37%	52%	35%	48%	46%	54%	48%	47%	43%	38%
Produce and consume products locally	52%	42%	49%	46%	38%	50%	30%	34%	37%	39%	43%	49%	29%	43%
Cut down on personal consumption	43%	38%	39%	47%	33%	53%	33%	28%	26%	38%	34%	45%	33%	34%
Reduce air travel	41%	17%	30%	49%	41%	36%	26%	27%	13%	14%	30%	41%	9%	36%
Reduce meat and dairy consumption	30%	25%	26%	38%	34%	36%	16%	30%	14%	20%	20%	38%	14%	28%



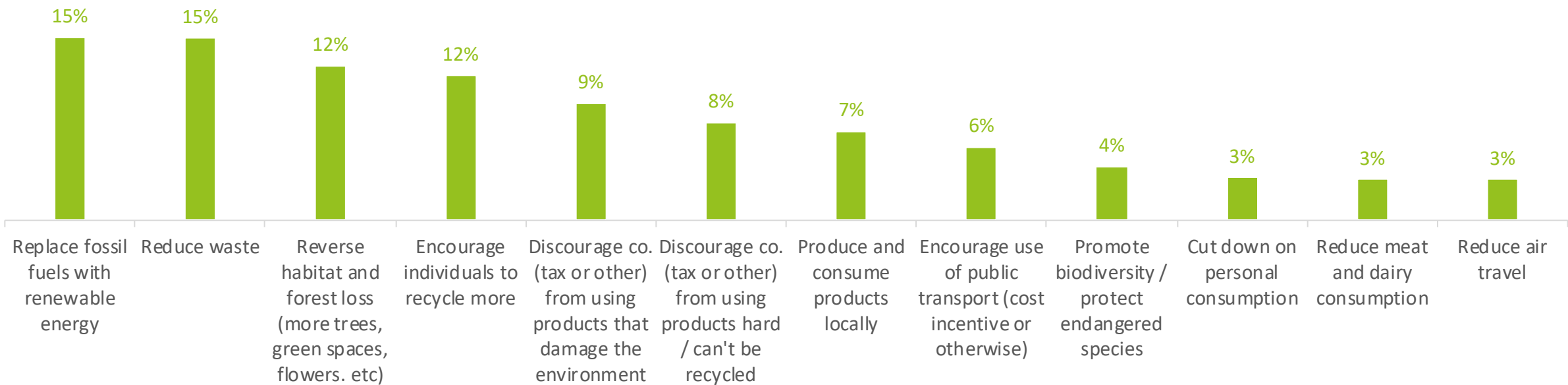
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INITIATIVE MOST WANTED IN OWN COUNTRY – OVERALL

Respondents are divided on the key priority but are most interested in seeing their country work towards replacing fossil fuel with renewable energy and reducing waste, followed by reversing habitat loss and encouraging individuals to recycle more. Reducing waste is favoured by Gen Z (18%), while Boomers and Silent are more likely to support replacing fossil fuel with renewable (18%, respectively).

Which one would you most like to see implemented in your country?

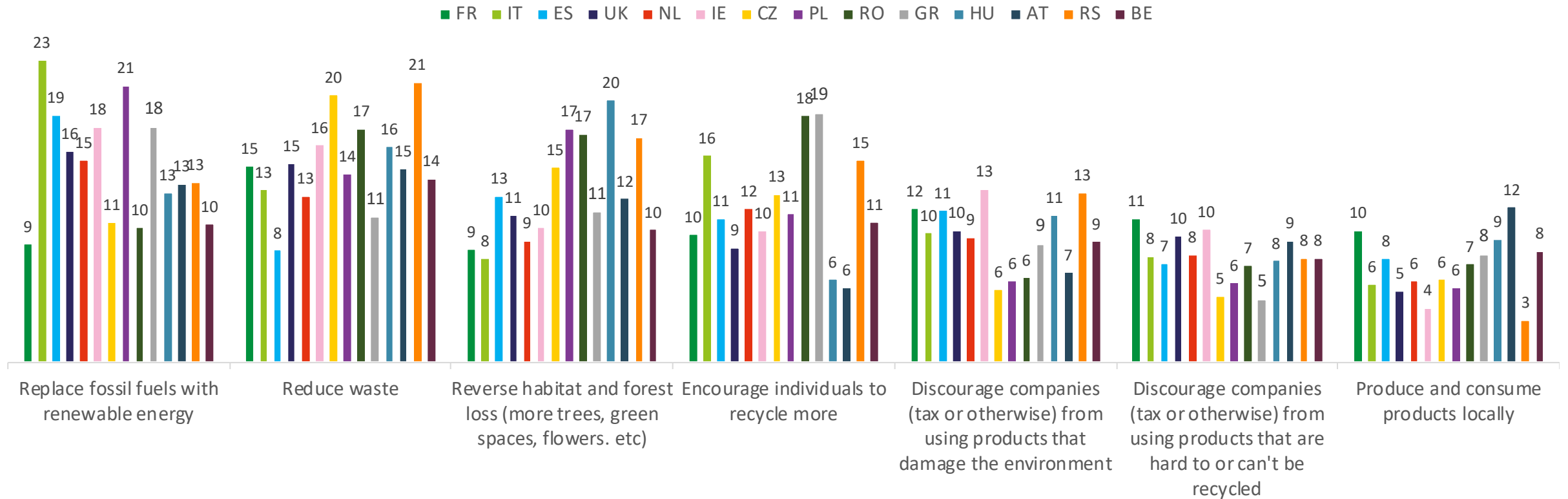


INITIATIVE MOST WANTED IN OWN COUNTRY – BY COUNTRY

Respondents in Italy, Spain, the Netherlands, Ireland, Poland, would most like to see fossil fuel replaced. In France and the Czech Republic, Romania, Serbia and Belgium reducing waste is the top priority. Respondents in Austria and Greece want for individuals to be encouraged to recycle more. Hungary and Austria prioritise reversing habitat loss. All three initiatives are about as important in the UK.

Which one would you most like to see implemented in your country?

Showing percentages, top 7



EDUCATING CONSUMERS ON RECYCLING - OVERALL

Over 40% of respondents feel poorly informed and want to know more about all the topics surveyed.
About half say they are not well informed about how much of their waste is actually being recycled and would like to know more.
Younger generations, especially Gen Z, are more likely to consider themselves sufficiently informed (see tables).

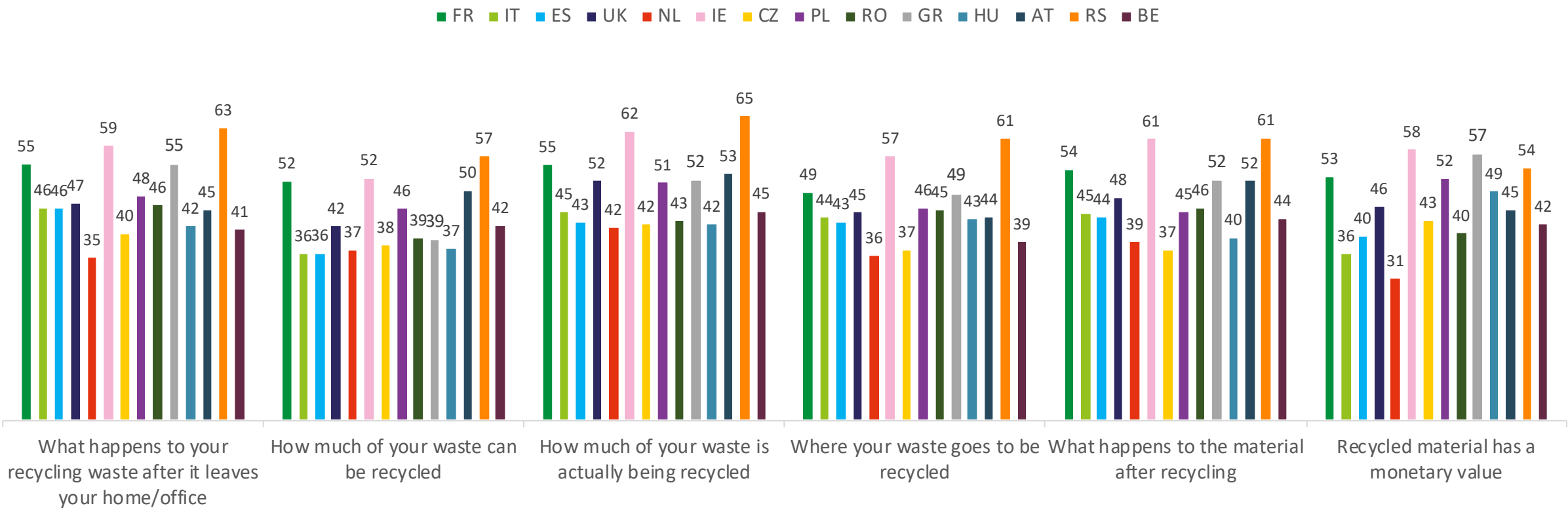
How well informed do you feel about the following?
Not well informed and would like to know more



EDUCATING CONSUMERS ON RECYCLING – BY COUNTRY

Respondents in Serbia, Ireland and France are most likely to say they do not feel well informed and would like to know more across the board.

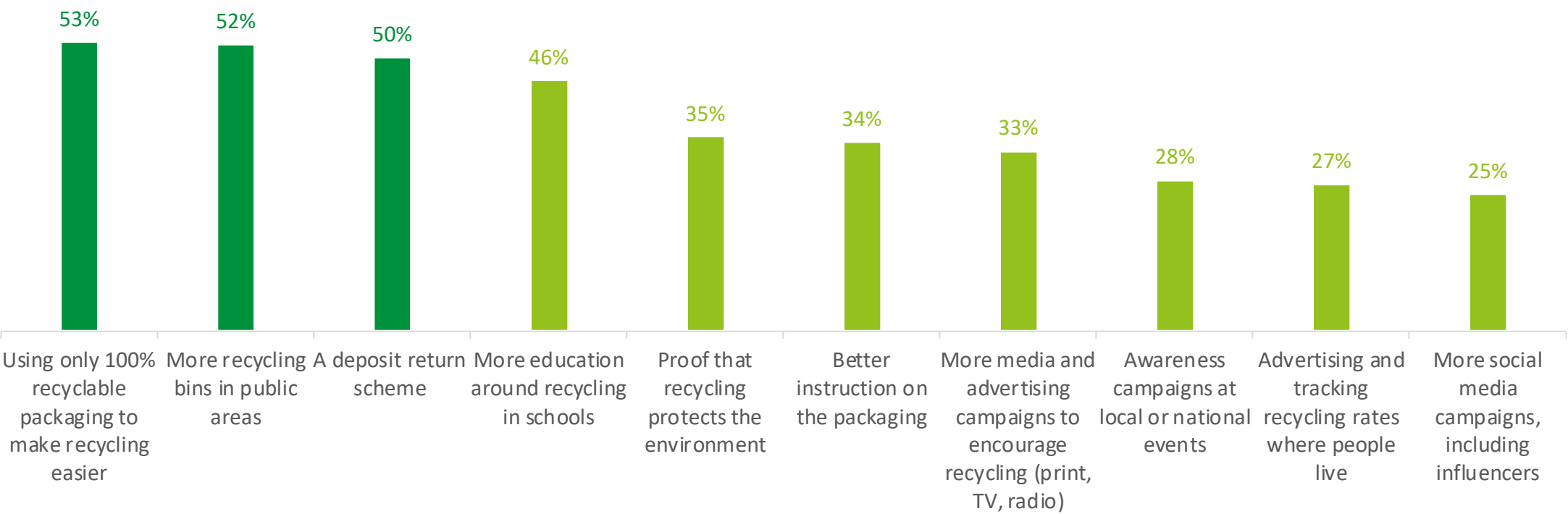
How well informed do you feel about the following?
Showing percentages, not well informed and would like to know more



ACTIONS TO INCREASE RECYCLING IN OWN COUNTRY - OVERALL

The top 3 initiatives consumers would like to see implemented in their country to increase recycling rates are: using only 100% recyclable packaging (53%), more recycling in public areas (52%) and a deposit return scheme (50%). Here again, older generations are more likely to support a greater number of initiatives (see tables).

What would you most want to see done to increase the recycling rate in your country?



ACTIONS TO INCREASE RECYCLING IN OWN COUNTRY – BY COUNTRY

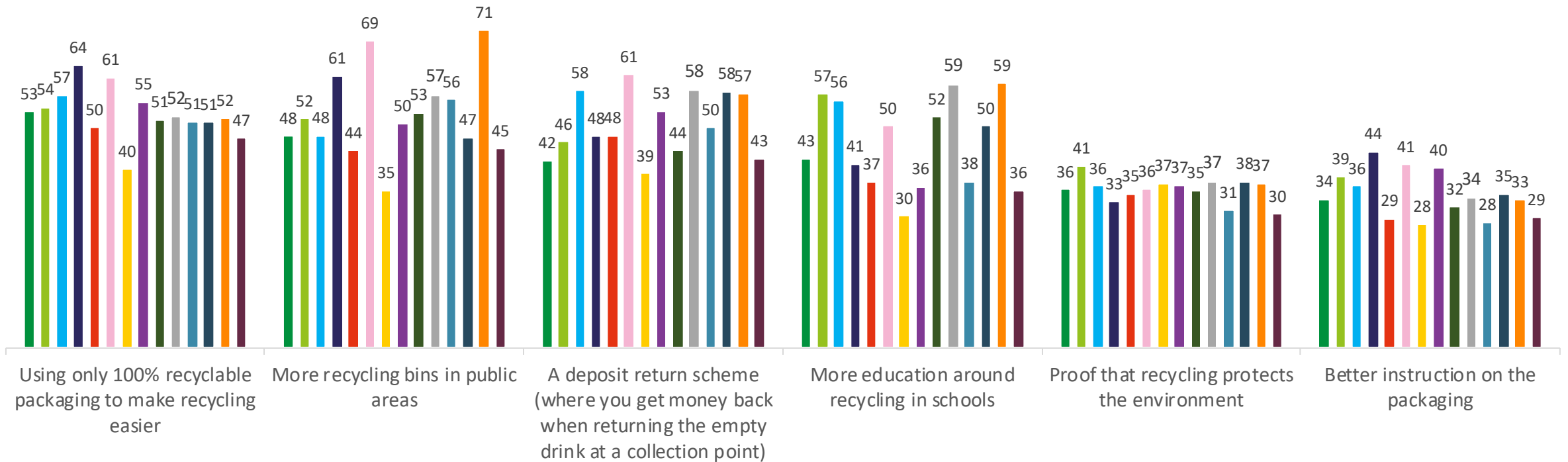
About 7 in 10 respondents in Serbia and Ireland want more recycling bins in public.

With the exception of the Netherlands,, the Czech republic and Belgium, a majority would like their own country to start using only 100% recyclable packaging to make recycling easier.

What would you most want to see done to increase the recycling rate in your country?

Showing percentages

FR IT ES UK NL IE CZ PL RO GR HU AT RS BE



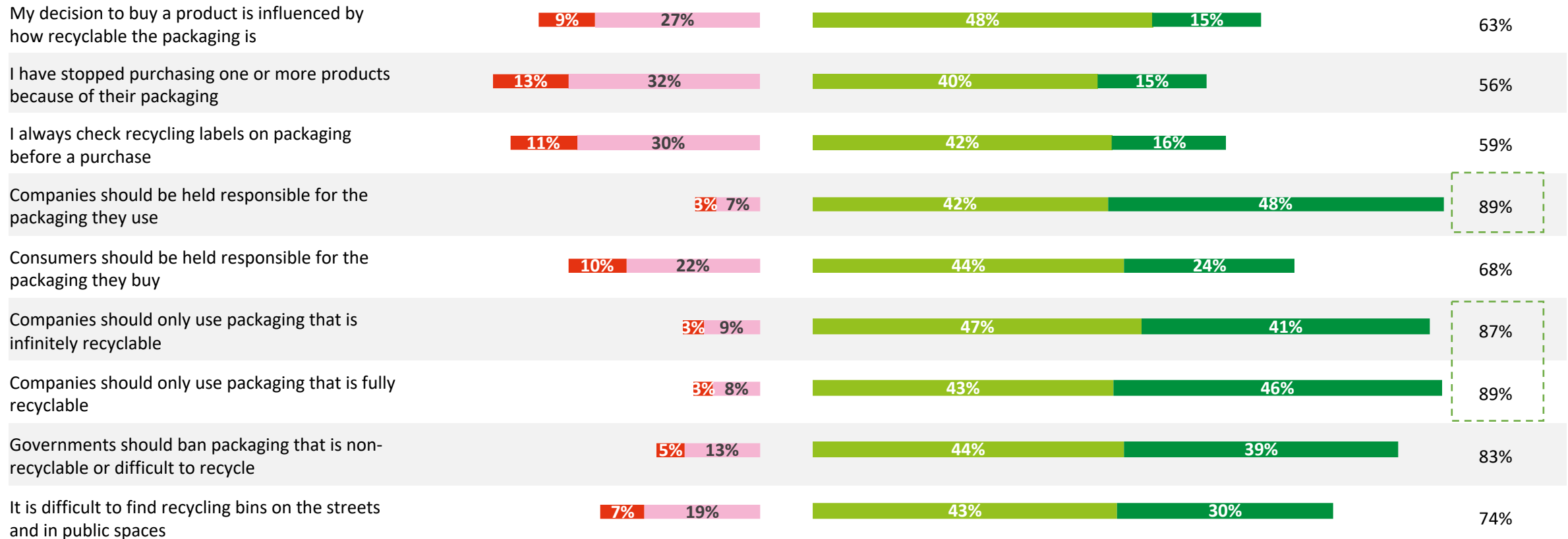
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STATEMENT BATTERY- OVERALL

The vast majority of respondents (89%) say companies should be held responsible for the packaging they use and only use packaging that is fully recyclable. 87% also say companies should only use packaging that is infinitely recyclable.

To what extent do you agree or disagree... Strongly / somewhat disagree Somewhat / strongly agree



ECC 2022 – N:12802

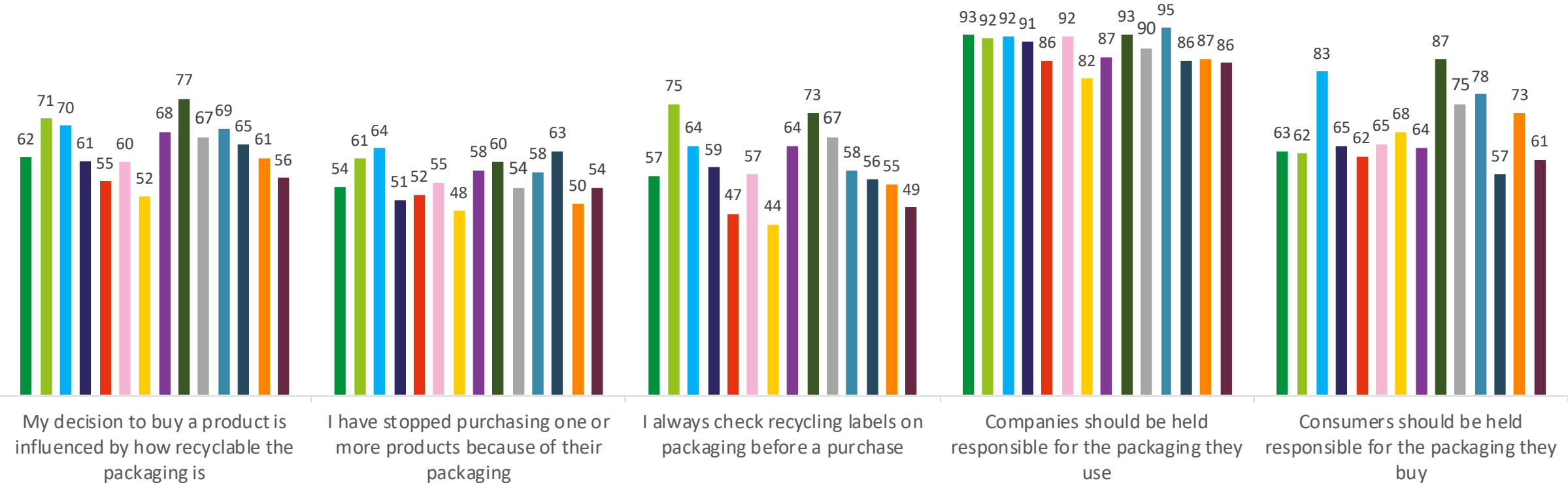
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STATEMENT BATTERY- BY COUNTRY (1 of 2)

Across the board, over 8 in 10 agree that companies should be held responsible for the packaging they use. Over 8 in 10 respondents in Spain and Romania also think that *consumers* should be held responsible for the packaging they *buy*. The greatest gaps between corporate and personal responsibility can be found in France and Italy (30 ppts) as well as Austria (29 ppts).

To what extent do you agree or disagree...
Showing percentages

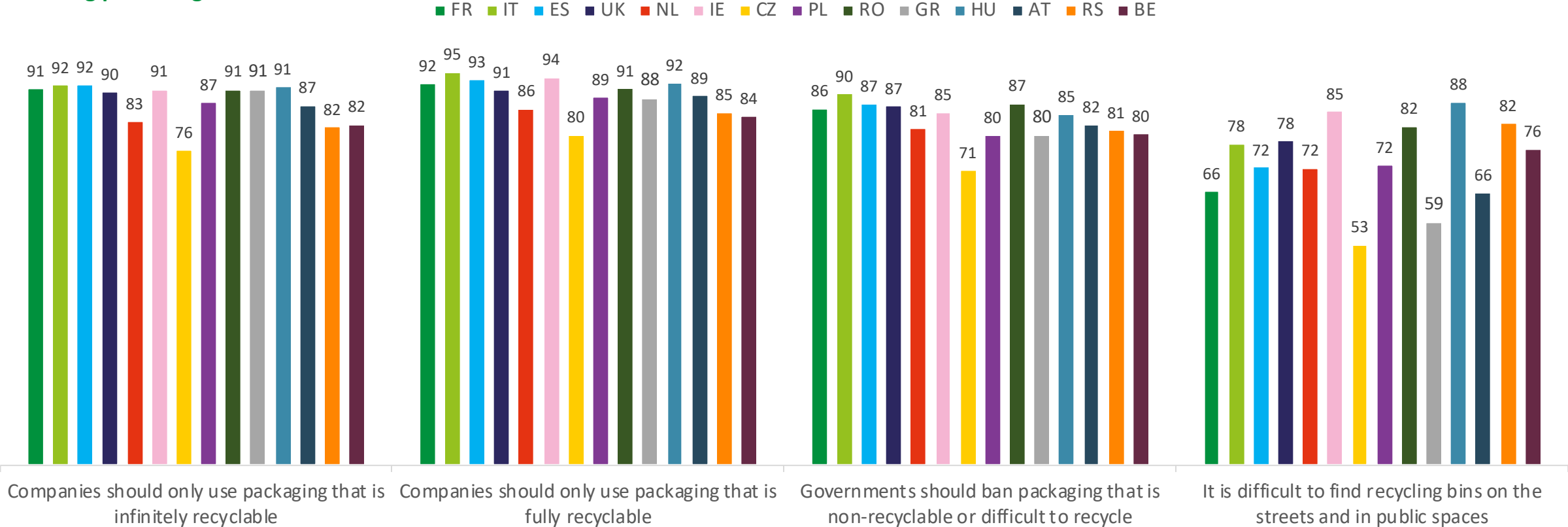
FR IT ES UK NL IE CZ PL RO GR HU AT RS BE



STATEMENT BATTERY- BY COUNTRY (2 of 2)

Across the board, over 8 in 10 think companies should only use packaging that is fully recyclable. With the exception of the Czech Republic, over 8 in 10 also think that companies should only use packaging that is infinitely recyclable and that governments should ban packaging that is non-recyclable or difficult to recycle. Over 8 in 10 in Ireland, Romania, Hungary and Serbia say it is difficult to find recycling bins on the streets and public spaces.

To what extent do you agree or disagree...
Showing percentages

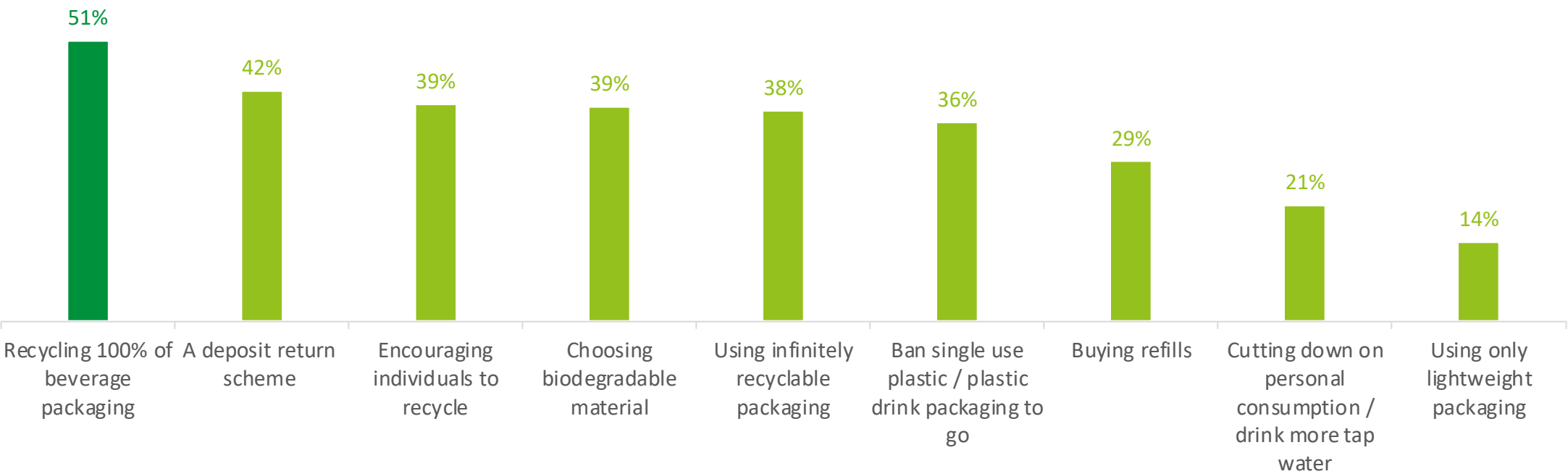


ROLE OF PACKAGING

BEST WAY TO REDUCE FOOTPRINT OF DRINK PACKAGING – OVERALL

A majority of consumers say the most effective way to reduce the environmental footprint of drink packaging is by recycling 100% of beverage packaging. Deposit return schemes are also popular while lightweight packaging is seen as effective by just 14%. Boomers and Silent over-index on all answers except for 'buying refills' (29% for all age groups).

What would be the most effective ways to reduce the environmental footprint of drink packaging?

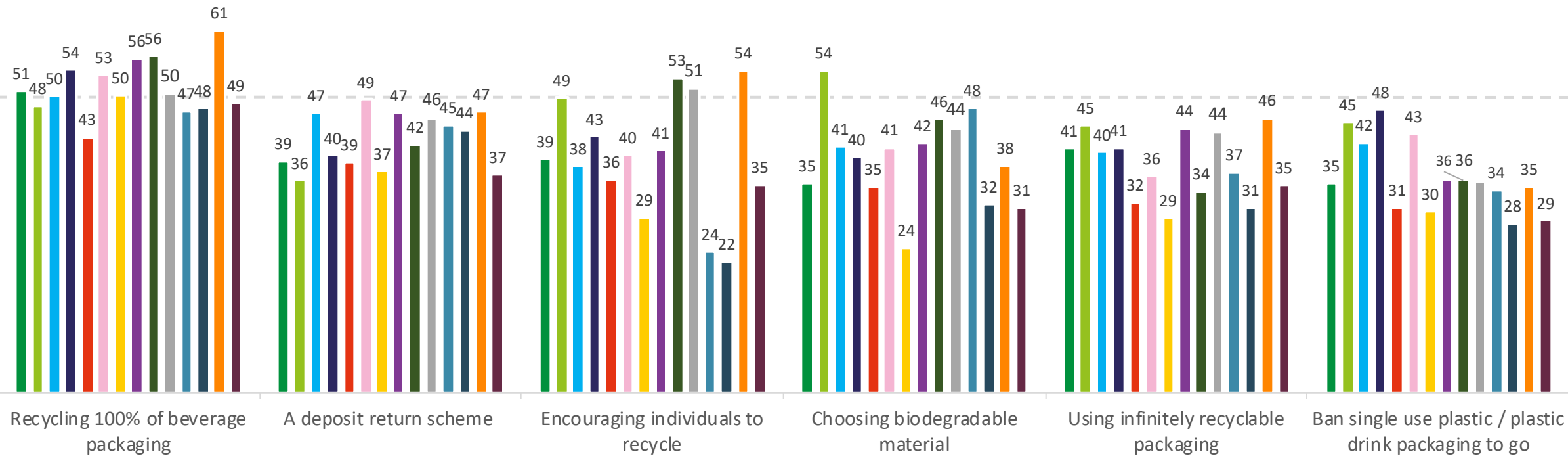


BEST WAY TO REDUCE FOOTPRINT OF DRINK PACKAGING – BY COUNTRY

For a majority in France, Spain, the UK, Ireland, the Czech Republic, Poland, Romania, Greece, and Serbia, recycling 100% of beverage packaging is the best way to reduce the footprint of drink packaging.

What would be the most effective ways to reduce the environmental footprint of drink packaging?
Showing percentages TOP 6

FR IT ES UK NL IE CZ PL RO GR HU AT RS BE



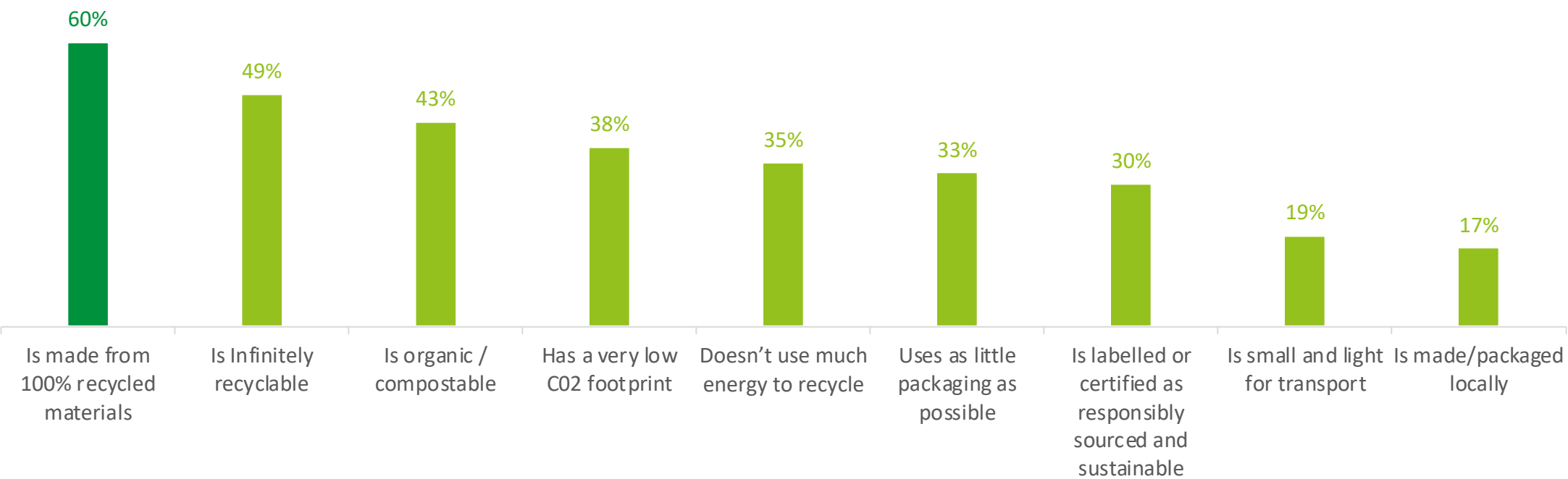
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SUSTAINABLE PACKAGING TRAITS – OVERALL

For 60% of consumers, a sustainable packaging is made from 100% recycled materials. About half say it is infinitely recyclable. The relative ranking of sustainable packaging traits remains consistent across age groups.

A sustainable packaging item...

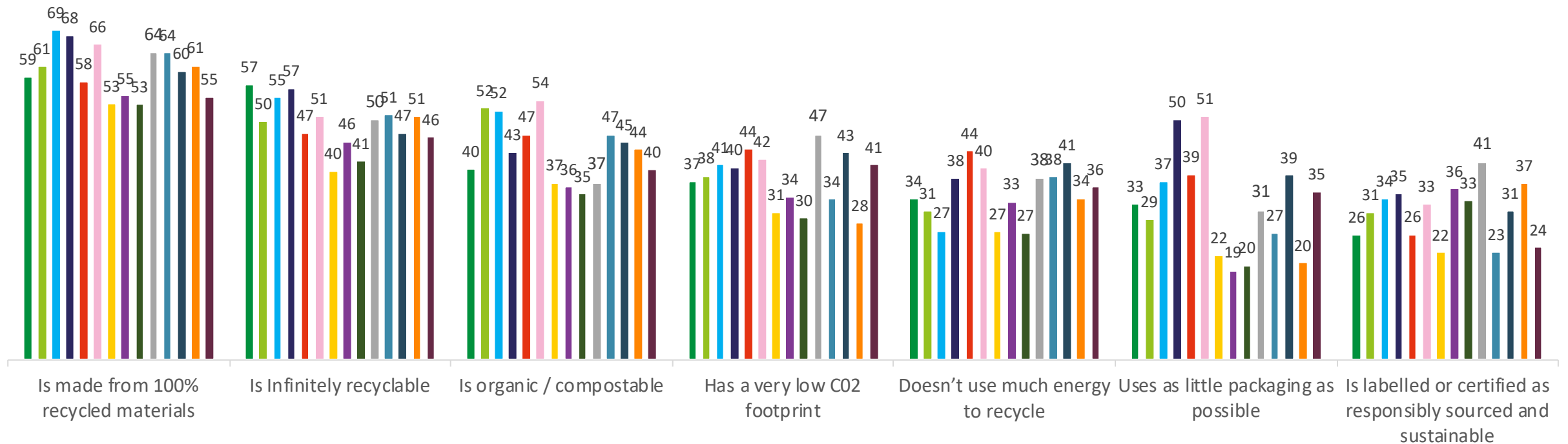


SUSTAINABLE PACKAGING TRAITS – BY COUNTRY

For consumers in all markets, a sustainable packaging is first and foremost made from 100% recycled materials. Respondents in the UK and Ireland are more likely to say that product should use as little packaging as possible (about half of respondents).

A sustainable packaging item... Showing percentages, top 7

FR IT ES UK NL IE CZ PL RO GR HU AT RS BE



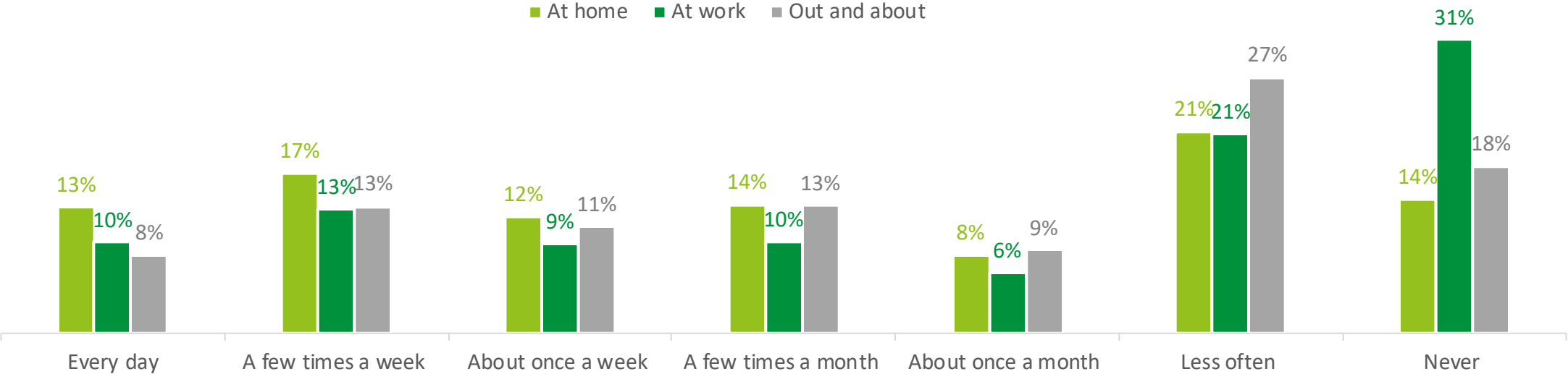
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FREQUENCY OF CAN CONSUMPTION - OVERALL

In an average week, 42% drink cans at home weekly, 32% drink cans at work or when out and about. Overall, frequency of consumption decreases with age (see tables).

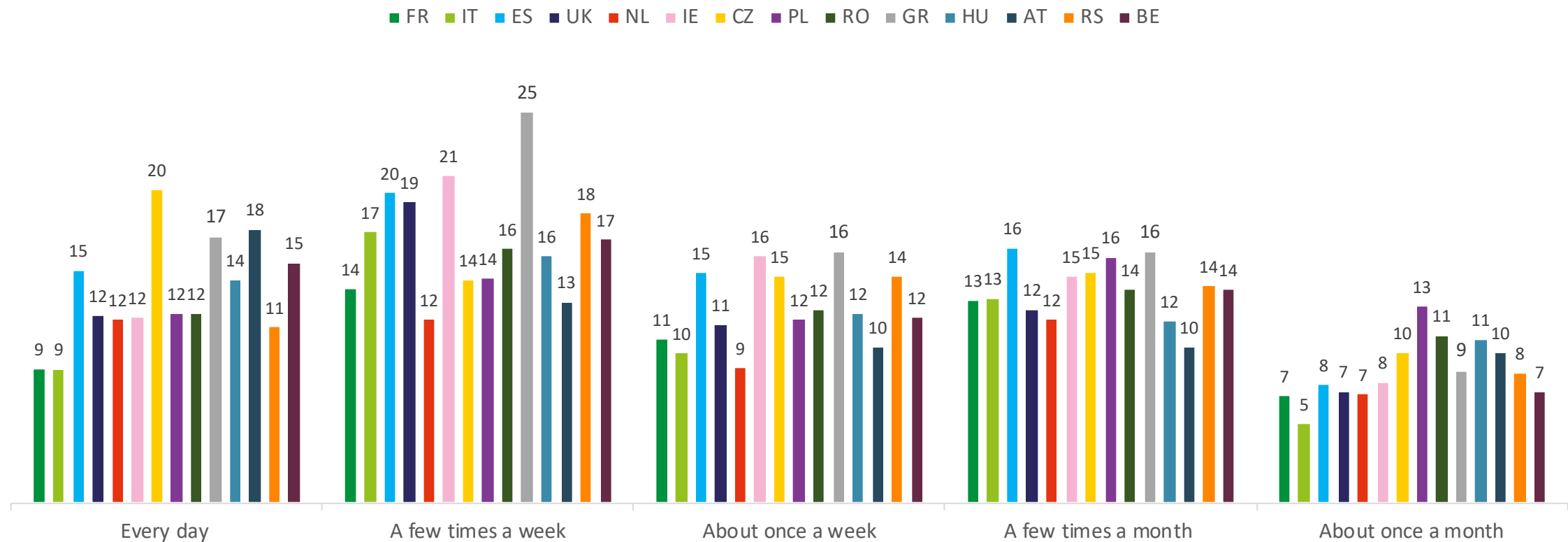
How often do you consume drinks in aluminium cans...?



FREQUENCY OF CAN CONSUMPTION – BY COUNTRY

At home, 20% of respondents in the Czech Republic consume cans on a daily basis. 58% of consumers in Greece consume cans at least once a week.

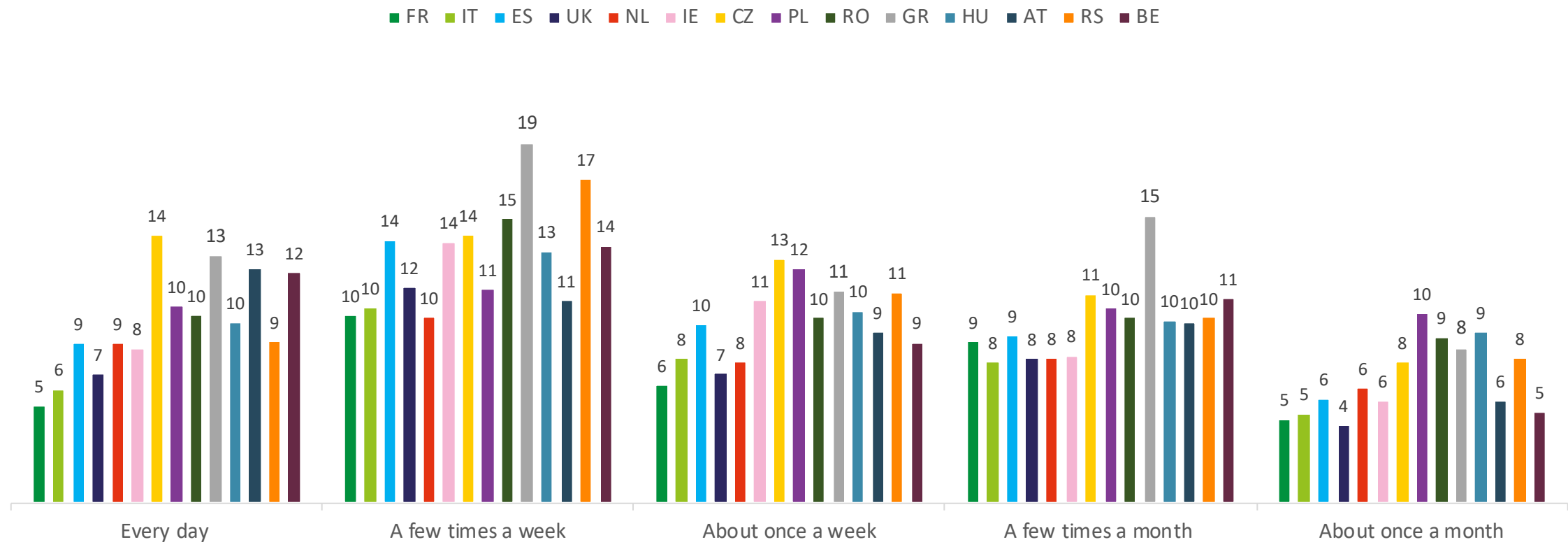
How often do you consume drinks in aluminium cans...?
AT HOME, showing percentages



FREQUENCY OF CAN CONSUMPTION – BY COUNTRY

43% of consumers in Greece and 41% of consumers in the Czech Republic consume cans at least once a week at work.

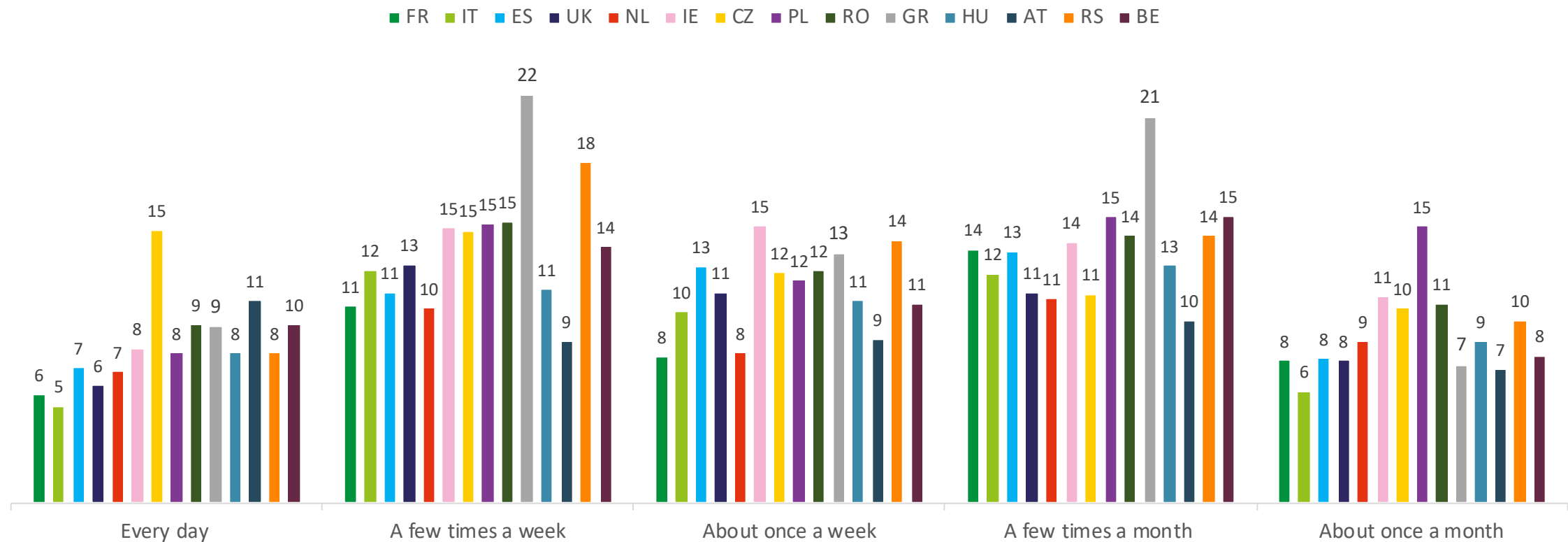
How often do you consume drinks in aluminium cans...?
AT WORK, showing percentages



FREQUENCY OF CAN CONSUMPTION – BY COUNTRY

44% of respondents in Greece and 42% of respondents in the Czech Republic consume cans at least once a week when out and about.

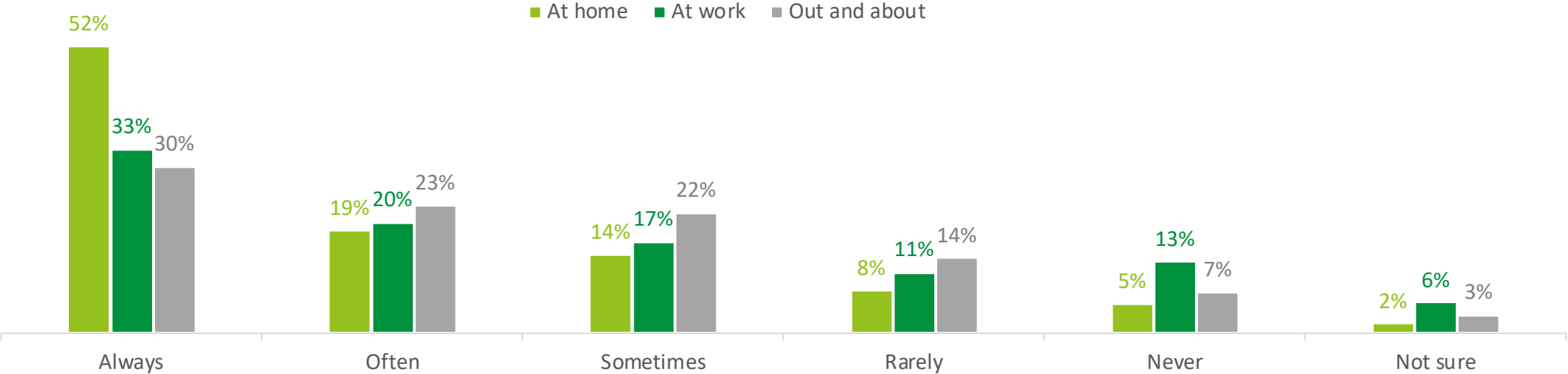
How often do you consume drinks in aluminium cans...?
OUT AND ABOUT, showing percentages



FREQUENCY OF CAN RECYCLING - OVERALL

While 52% say they always recycle at home, only about 1 in 3 always recycle at work or when out and about. Older generations, especially Gen X and Boomers, are more likely to say they always recycle wherever they are.

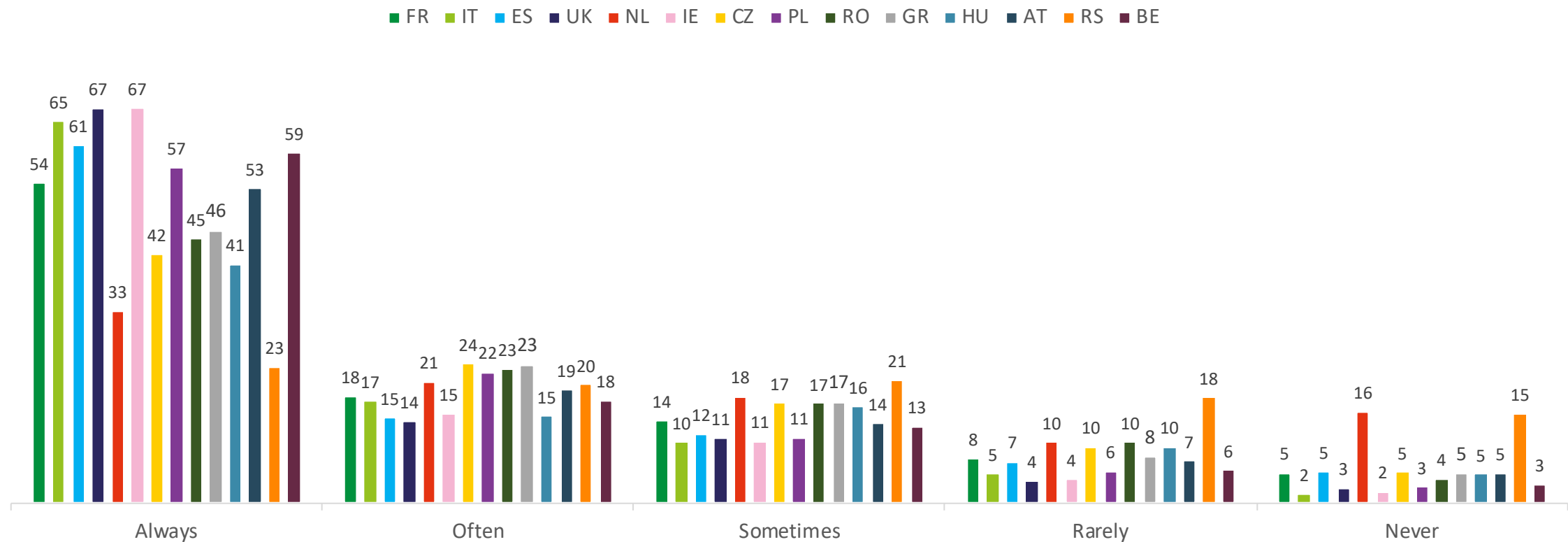
How often do you recycle aluminium drink cans when...



FREQUENCY OF CAN RECYCLING - OVERALL

In France, Italy, Spain, the UK, Ireland, Poland, Austria and Belgium, a majority always recycle cans when at work.

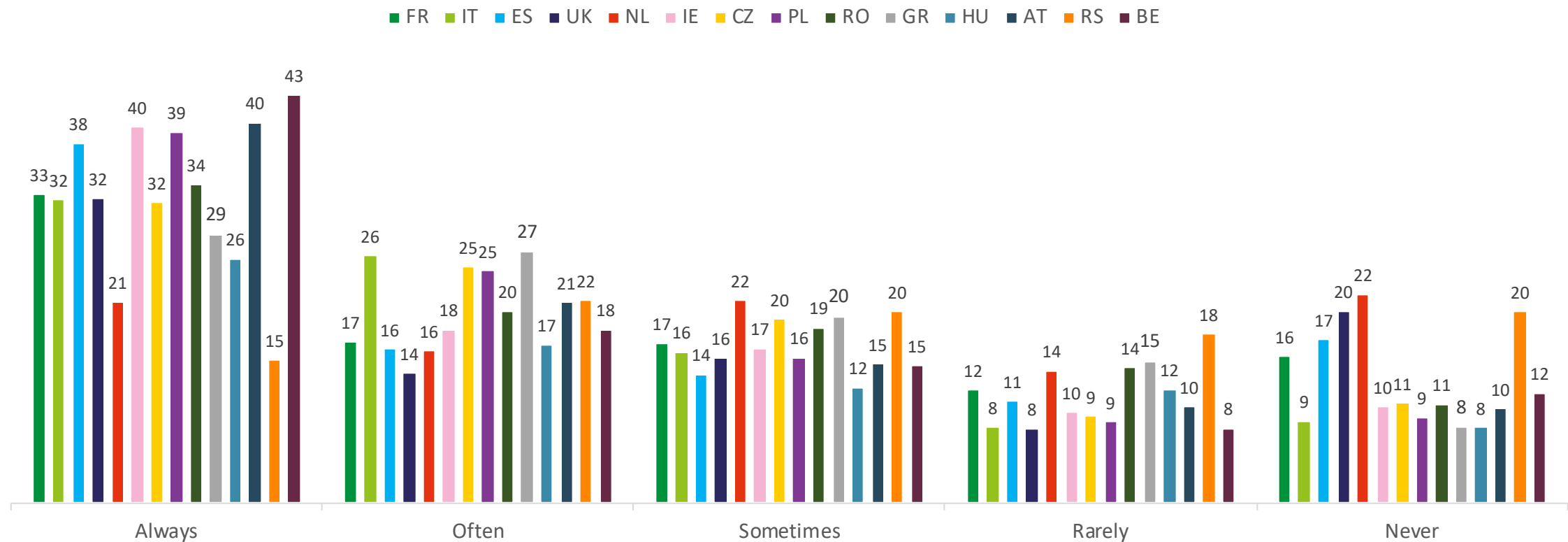
How often do you recycle aluminium drink cans when...
AT HOME, showing percentages



FREQUENCY OF CAN RECYCLING - OVERALL

Across all markets, a minority always recycle cans when at work.

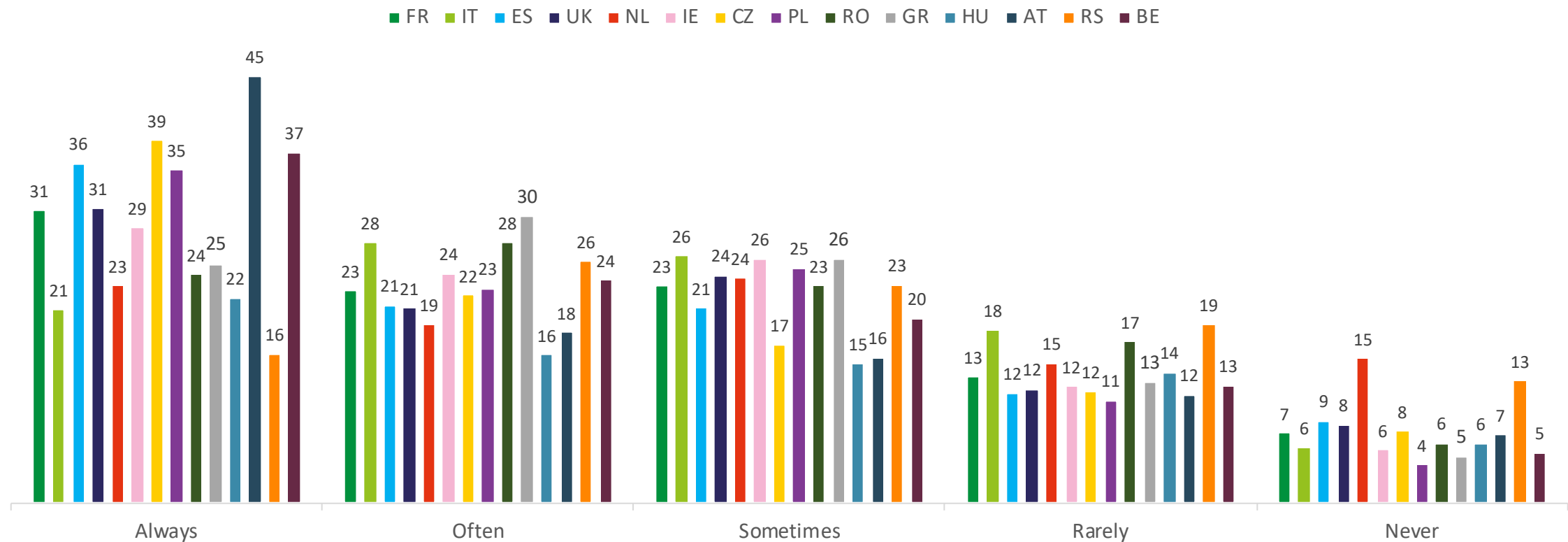
How often do you recycle aluminium drink cans when...
AT WORK, showing percentages



FREQUENCY OF CAN RECYCLING - OVERALL

Across all markets, a minority always recycle cans when out and about.

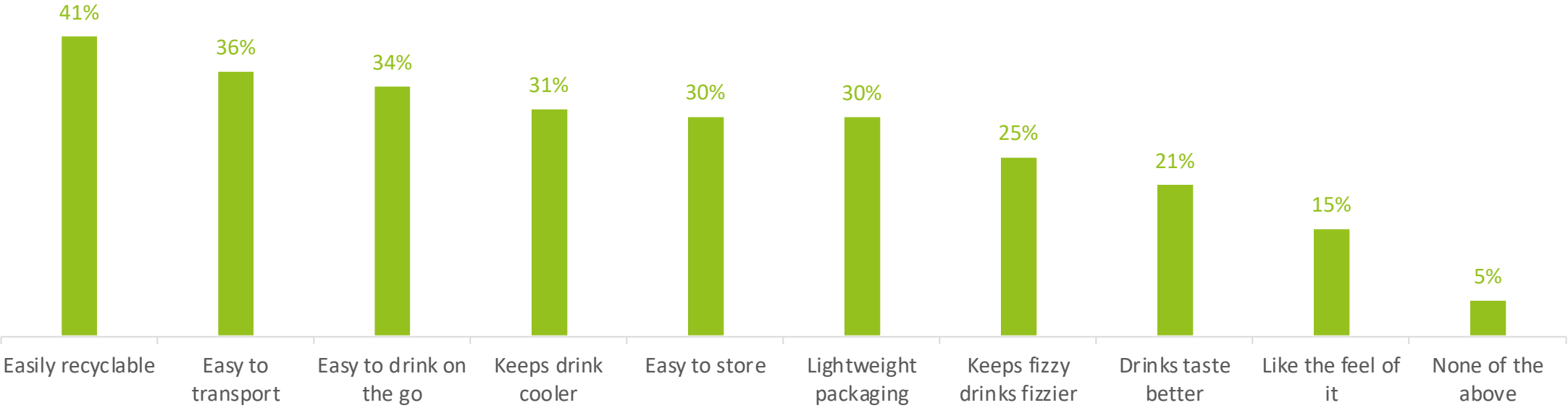
How often do you recycle aluminium drink cans when...
OUT AND ABOUT, showing percentages



REASONS TO CHOOSE CANS - OVERALL

The top reason to choose cans over other packaging is because they are easily recyclable. This is followed by easy to transport and easy to drink on the go. 34% of Gen Z prefer cans because they keep their drinks cooler, while other age groups would choose the packaging for its recyclability (see tables).

What are some of the reasons you may choose cans over other packaging?

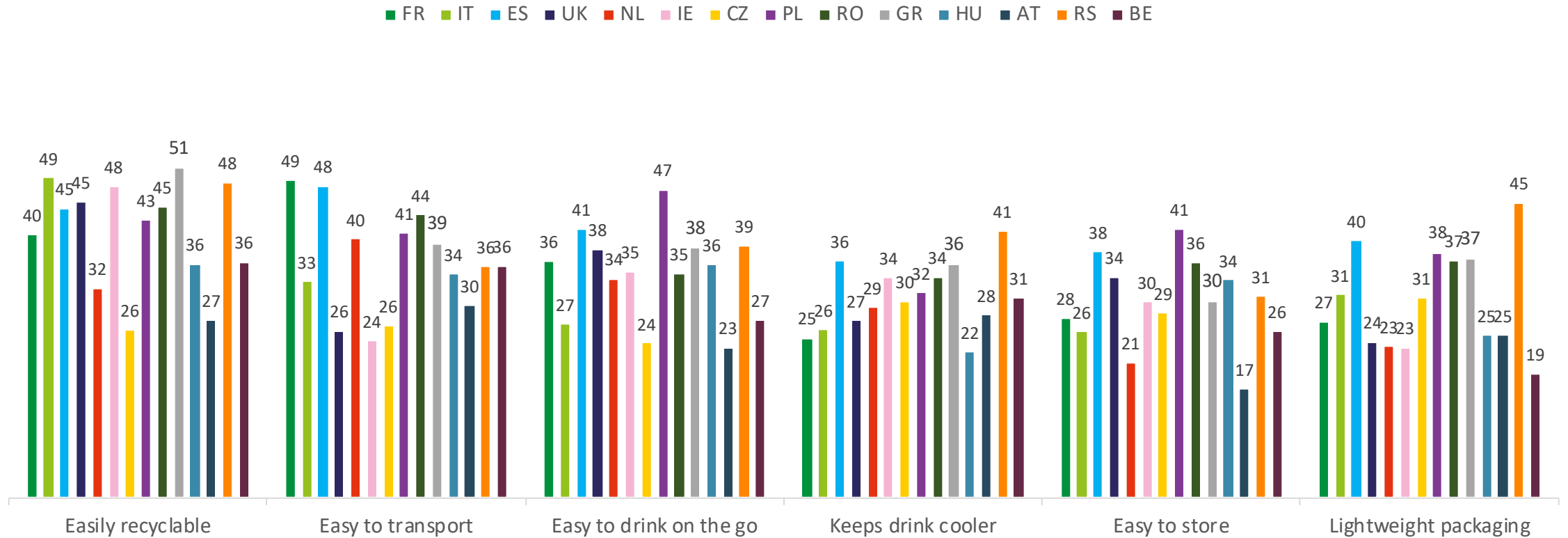


REASONS TO CHOOSE CANS – BY COUNTRY

Reasons for choosing cans over other types of packaging vary across countries. In Poland it is favoured for being easy to drink on the go. In Italy, Ireland, Greece, the UK or Serbia it is chosen for being easily recyclable. In France, Spain or the Netherlands it is more likely to be seen as easy to transport.

What are some of the reasons you may choose cans over other packaging?

Showing percentages



BRAND & COMS

For Internal Use Only
Please see separate presentation

THANK YOU



THIS WAS MADE WITH INSIGHT - CHARLOTTE.PARIS@MADEWITHINSIGHT.COM

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	50%	40%	51%	52%	47%	50%	36%	68%	50%	49%	55%	42%	54%	55%	51%
Female	50%	60%	48%	48%	53%	50%	64%	30%	49%	51%	45%	58%	45%	45%	49%
Self-describe	0%	0%	0%	0%	-	-	1%	0%	0%	0%	0%	0%	0%	1%	0%
Prefer not to say	0%	0%	-	0%	-	0%	0%	-	1%	0%	0%	0%	0%	0%	0%

SAMPLE STRUCTURE: AGE

	TOTAL	FR	IT	ES	UK	NL	IE	CZ	PL	RO	GR	HU	AT	RS	BE
Gen-Z (16-24)	17%	11%	15%	11%	7%	14%	14%	35%	21%	18%	21%	16%	24%	17%	17%
Millennials (25-39)	35%	25%	25%	28%	25%	33%	51%	36%	36%	42%	43%	36%	35%	43%	34%
Gen X (40-54)	27%	27%	26%	31%	28%	26%	26%	20%	25%	27%	29%	31%	25%	32%	29%
Baby Boomers (55-74)	20%	36%	32%	29%	36%	25%	9%	7%	17%	12%	7%	17%	15%	7%	20%
Silent Gen. (75+)	1%	2%	2%	1%	4%	3%	1%	1%	1%	1%	0%	1%	1%	0%	1%

SAMPLE STRUCTURE: CITY SIZE

	TOTAL	FR	IT	ES	UK	NL	IE	CZ	PL	RO	GR	HU	AT	RS	BE
A metropolis (more than 1 million people)	16%	10%	15%	19%	7%	4%	9%	16%	12%	19%	38%	28%	27%	21%	7%
A city (100,000 to 1 million people)	28%	19%	24%	41%	25%	40%	24%	22%	38%	43%	39%	19%	24%	38%	16%
A town or small city (1,001 to 100,000 people)	40%	52%	57%	37%	52%	44%	45%	48%	33%	29%	19%	41%	39%	37%	30%
A village / rural (1,000 people or less)	12%	20%	4%	3%	16%	12%	23%	14%	16%	9%	4%	13%	11%	4%	14%