

## Executive Summary Report

In light of changes in global trade policies impacting the scrap recycling industry, the Institute of Scrap Recycling Industries, Inc. (ISRI) sought a better understanding of the general attitudes on recycling shared by Americans. ISRI commissioned The Harris Poll to conduct a survey that would provide these insights with the goal to identify ways in which manufacturers, brands, and government could improve both the supply and demand of recyclable material.

A summary of the findings follow:

### If You Build It, They Will Recycle

Recycling is a behavior that needs to be made easy for Americans, otherwise it may not get done.

Two-thirds (66%) of Americans agree that “if a product is not easy/convenient for me to recycle, I probably would not recycle it”; and this is an attitude representative of Americans’ approach to recycling overall.

### Recycling as a Purchase Consideration

More than 1 in 10 Americans consider whether or not a product can be recycled when making a purchasing decision (12%). The same is true regarding whether or not the product’s *packaging* can be recycled (13%) (Table 1).

Table 1

Q5 Other than the cost of the product, which of the following, if any, do you consider to be among the most important factors when making a purchasing decision? Please select all that apply.	2018 Total
The quality of the product	74%
Product reviews	49%
What the product is made of (i.e., materials)	38%
<b>Whether or not the product can be recycled</b>	<b>12%</b>
Whether or not the product was made from any recycled materials	11%
The product's brand	44%
Where the product was manufactured	26%
How the product was manufactured	19%
Whether or not any animals were harmed in the making of the product	19%
Whether the product is recommended by people I know	22%
<b>Whether or not the product's packaging can be recycled</b>	<b>13%</b>
What the product's packaging is made of	11%
Whether or not the product's packaging is made from recycled materials	10%
Whether the product is used by people I know	16%
Something else	4%
Nothing - Cost is the only factor I consider important.	7%

The purchase priorities are similar across demographic groups. Some notable differences include:

- Younger Americans (aged 18-34) are more likely to consider the products packaging – including whether or not the packaging can be recycled (17%), what the package is made of (16%) and whether the package is made from recycled materials (16%) – than are older Americans.
- Younger Americans also are more likely than are older Americans to consider whether the product is used (23%) or recommended (30%) by people they know.
- Americans in the West are more likely than elsewhere to consider whether the packaging (17%) or product (16%) can be recycled.

### Reducing the Burden

The survey shows evidence that two things will likely reduce the recycling burden, thus increasing the chances that something gets recycled: Make it easy to recycle products specifically, and make it easy to recycle in general.

#### Make it Easy to Recycle Products

*If a product is not easy/convenient for me to recycle, I probably would not recycle it.*

Two-thirds (66%) of Americans agree with this statement. Younger Americans (under 18-44) are more likely to agree (69%), but otherwise, this sentiment is shared across all types of Americans (see Table 2). But this shows how sensitive recycling behavior can be simply to making it easier to do so.

Eighty-one percent would also like to see a "Recycling Guide" label on products (similar to the Energy Guide label on appliances) that would detail the parts and percentage of the product that can be recycled and how. Having this information more prominent may help Americans consider these aspects of their product when making a purchase – or it could also encourage recycling of the product or package when disposing of it.

Table 2

Q10 How strongly do you agree or disagree with each of the following statements? %	2018
Saying Strongly/Somewhat agree	Total
Recycling collection sites need to be more readily accessible to consumers.	86%
I would like to see manufacturers and/or retailers display a "Recycling Guide" label on products (similar to the Energy Guide label on appliances) that would detail the parts and percentage of the product that can be recycled and how.	81%
If a product is not easy/convenient for me to recycle, I probably would not recycle it.	66%

#### Make it Easy to Recycle ... Period

One of the most agreed on statements tested in this survey is this: *Recycling collection sites need to be more readily accessible to consumers* (86%). In addition, 79% of Americans have a curbside recycling program where they live (see Table 3); 45% have one but believe either that the program is not valuable (10%) or it can at least be improved (36%). Only about a third (34%) of Americans say they have a curbside recycling program that is “effective and efficient.” This is more likely on the West coast (37%) and the Northeast (40%).

Table 3

Q15 Which of the following statements most accurately describes your views on curbside recycling programs in your community?	2018 Total
Have Recycling Program (Net)	79%
Recycling Program Can Be Improved/Not Valuable (Sub-Net)	45%
It is provided by my community, but I do not believe it is a valuable service.	10%
It is a valuable service provided by my community, but I believe it can be improved.	36%
It is a valuable service provided by my community that is effective and efficient.	34%
Not applicable - there is not a curbside recycling program where I live.	21%

Of those who say the program can be improved, many mention something about improving the operation (see Table 4). More frequent pickups (36%), separate bins for different recyclable materials (35%), and larger recycling containers (35%) are all commonly cited as areas for improvement.

Educating the public on what is and what is not recyclable is a popular improvement (42%) as is educating the public about the process used for recycling materials (33%). Even 17% say implementing fines for residents who recycle improperly would help improve curbside recycling in their community.

Table 4

Q20 Which of the following do you believe would help improve curbside recycling in your community? Please select all that apply. [Among those who say recycling program can be improved or is not valuable]	2018 Total
Process (Net)	79%
Have more frequent recycling pickups	36%
Use separate bins for different recyclable materials	35%
Provide larger recycling containers to manage volume	35%
More public investment in recycling infrastructure to better sort and process material	28%
Allow collectors to refuse pickup of non-recyclable materials and leave them at the curb	18%
Education (Net)	54%
Better public education on what is and is not recyclable	42%
Better public education about the process used for recycling materials	33%
Incentives (Net)	29%
Allow collectors to leave notes to residents who recycle properly	18%
Implementation of fines for residents who improperly recycle	17%
Eliminate recycling in my community	4%
There is nothing that can be done to improve recycling	5%

Some notable demographic differences in terms of what could improve curbside recycling programs. (Among those who say curbside recycling programs can be improved):

- Americans under 54 are more likely than those older to believe more frequent picks (18-34: 43%, 35-44: 35%, 45-54: 42%) would help.

- Conversely, those over 54 are more likely than younger to believe public education on what is recyclable would help (54-64: 57%, 65+: 51%).
- Higher income Americans (\$100k+ per year household income) are more likely than lower income groups to cite education on what is recyclable (49%) and fines for noncompliance (19%) as improvements.

### The State's Role

The government can also set an example for Americans by prioritizing recyclable materials. In fact, four in five Americans (80%) agree that governments at all levels should prioritizing recyclable products/material when making purchasing decisions.

Table 4

Agree / Disagree	2018 Total
(Q25) Federal, state, and local governments should prioritize recyclable products/material in government purchasing/spending decisions. [Strongly/Somewhat agree]	80%

### Survey Method

This survey was conducted online within the United States by The Harris Poll on behalf of ISRI from September 17-19, 2018 among 2,003 U.S. adults. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

Results were weighted for age within gender, region, race/ethnicity, marital status, household size, income, employment, and education where necessary to align them with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online.