

REPORT



Executive Summary Report

The following information provides insights into American's attitudes and opinions about recycling.

Key Findings

More than one in five (22%) Americans say that when making a purchase, they always or often look for information on whether or not the product was made from recycled materials. Furthermore, they would be willing to spend an average of 10% more for a product if they knew it was made of recycled materials.

A strong majority (86%) of Americans would appreciate it if manufacturers designed products to be easier for consumers who recycle to disassemble in preparation for recycling and more than 4 in 5 (81%) say they 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.

Convenience is key as more than 3 in 5 (62%) Americans say that if a product is not easy or convenient to recycle, they probably would not recycle it. Americans say they would be willing to spend 13% more, on average, for a product if they knew it was easy and convenient to collect and take to a recycling center (or picked up at their home on a curbside program) or if it was fully recyclable (i.e., all parts of the item could be recycled).

The vast majority (90%) of Americans think that recycling collection sites need to be more readily accessible to consumers. Furthermore, 68% believe that manufacturers and/or retailers should pay for recycling programs when they are not already available to consumers, while 62% think the government should pay for these recycling programs.

While 94% of Americans say they ever recycle and more than 2 in 5 say they always recycle, only 15% think it's important to consider whether or not a product can be recycled when making a purchasing decision. Americans generally have a positive opinion on recycling, with close to 7 in 10 (68%) saying recycling is the right thing to do and 58% saying they wish more people did it. While more than 1 in 4 (26%) Americans wish they recycled more, only 9% consider it to be a hassle.

Detailed Findings

1. *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? (U.S. adults, n=2,013)*

A majority of Americans (92%) believe there are factors other than cost that are important to consider when making a purchasing decision. 4 in 5 (80%) say the quality of the product is important, while over half (55%) think product reviews are important. More than 2 in 5 (43%) consider the product's materials (what the product is made of and whether or not the product was made from recycled materials), where/how the product is manufactured and the product's brand to be important. Slightly fewer (35%) consider whether or not the product is used by or recommended by people they know. More than 1 in 5 (23%) think it's important to consider whether or not any animals were harmed in the making of the product and just under 1 in 5 (19%) think the product's packaging is important (what the packaging is made of and whether or not the packaging can be recycled/was made from recycled materials). Only 15% of Americans say they think it's important to consider whether or not the actual product can be recycled when making a purchasing decision. 5% say they think it's important to consider something else and 8% say cost is the only factor they believe is important.

Regional differences

- Westerners (19%) are more likely to consider whether or not a product can be recycled at all than those in the Northeast or South (12%, each). Those who live in the West (18%) are also more likely than those in the Northeast (12%) to consider whether or not the product's packaging can be recycled. Those who live in the West (18%) or Midwest (15%) are more likely than those who live in the South (8%) to think it's important to consider whether or not a product was made from recycled materials when making a purchasing decision.

HHI differences

- Those with a HHI of \$75k-\$99.9k (19%) are more likely than those with a HHI of less than \$50k (11%) to consider whether or not a product was made from any recycled materials important when making a purchasing decision. Those with a HHI of \$75k-\$99.9k (15%) are also more likely than those with a HHI of \$50k-\$74.9k (8%) and those with a HHI of \$100k+ (7%) to consider whether or not the product's packaging is made from recycled materials important.
- Those with a HHI of \$100k+ (19%) are more likely than those with a HHI of less than \$50k (13%) to say they consider whether or not a product can be recycled an important factor when making a purchasing decision.

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle are significantly more likely than those who never recycle to say they consider each of the following to be among the most important factors when making a purchasing decision:
 - The quality of the product (80% vs. 71%)
 - What the product is made of (i.e., materials) (40% vs. 28%)
 - Whether or not the product was made from any recycled materials (14% vs. 2%)
 - Whether or not the product's packaging can be recycled (15% vs. 1%)
 - Whether or not the product's packaging was made from recycled materials (10% vs. 1%)
 - What the product's packaging is made of (9% vs. 2%)
 - Whether or not the product can be recycled (16% vs. 1%)

Possible headline – Only 15% of Americans think it's important to consider whether or not a product can be recycled when making a purchasing decision.

2. How often, if ever, do you recycle? (U.S. adults, n=2,013)

An overwhelming majority of Americans (94%) say they ever recycle, with more than 2 in 5 (43%) saying always do, more than 1 in 4 (26%) saying they do so often, and just under 1 in 4 (24%) saying the sometimes do so. Only 6% of Americans say they never recycle.

Age differences

- Those ages 35+ (48%) are significantly more likely than those ages 18-34 (33%) to say they **always** recycle. Those ages 65+ (54%) are also more likely to say this than those ages 35-44 (43%).
- Younger adults ages 18-34 (30%) are more likely to say they **often** recycle than those ages 55-64 (22%). Furthermore, those ages 18-64 (26%) are more likely than those ages 65+ (14%) to say they **sometimes** recycle.

Regional differences

- Those who live in the West (95%) are more likely than those in the South (91%) to say they **ever** recycle. Those in the Northeast (79%) and West (76%) are more likely than those in the Midwest (64%) or South (63%) to recycle **always/often**.

Possible headline – More than 2 in 5 Americans say they always recycle.

3. Which of the following, if any, describe your feelings about recycling? (U.S. adults, n=2,013)

A majority (68%) of Americans believe recycling is the right thing to do and that they wish more people did it (58%). More than half say it's the socially responsible thing to do (55%) and that it is critical to reduce landfill space (54%). 51% of those who ever recycle say it makes them feel good to do so, and 26% of those who ever recycle wish they did it more. Close to half (49%) of Americans believe recycling is critical to conserve natural resources and 2 in 5 (40%) believe it's critical to reduce energy consumption. Some Americans have doubts about recycling as 26% of say they are not always certain if an item is recyclable and 6% say they don't believe the items they set aside for recycling are actually recycled. 12% of Americans who ever recycle say they do so because they get paid for the materials (i.e., they sell their scrap materials to a recycling/scrap yard). 9% of Americans believe recycling is a hassle, 3% say it isn't necessary, and 2% say it doesn't matter.

Gender differences

- Women are more likely than men to feel each of the following about recycling:
 - It is critical to reducing landfill space (58% vs. 49%)
 - It makes them feel good to recycle (56% vs. 45%)
 - They are not always sure whether or not an item is recyclable (29% vs. 23%)
- Men are more likely than women to say recycling isn't necessary (4% vs. 1%) and that recycling doesn't matter (3% vs. 1%).

Age differences

- Those ages 65+ (78%) are more likely than any other age group to say recycling is the right thing to do [69% of those ages 55-65; 67% of those ages 45-54; 65% of those ages 35-44; 62% of those ages 18-34]. Older adults ages 65+ are more likely than those ages 18-34 to say recycling is the socially responsible thing to do (61% vs 53%, respectively) and that it is critical to reduce energy consumption (46% vs. 36%, respectively).
- Those ages 45+ (60%) are more likely than those ages 18-34 (45%) to say recycling is critical to reduce landfill space.

- Those ages 55-64 (17%) are more likely than those ages 18-34 (10%), 45-54 (7%), and 65+ (10%) to say they recycle because they get paid for the material.
- Younger adults ages 18-34 (37%) are more likely than those ages 35+ (22%) to say they wish they recycled more. They are also more likely than those ages 35-64 (22%) to say they are not always certain if an item is recyclable.

Regional differences

- Those who live in the West (66%) are more likely than those in any other region to say they wish people recycled more [55% of those in the Midwest; 55% of those in the Northeast; 57% of those in the South]. Those who live in the West (61%) are more likely than those who live in the Midwest (52%) or South (51%) to say recycling is critical to reduce landfill space.
- Westerners who ever recycle (57%) are more likely than Northeasterners who ever recycle (47%) to say it makes them feel good to recycle. Westerners who ever recycle (20%) are also more likely than recyclers in any other region to say they recycle because they get paid for the materials [10% of recyclers in the Midwest; 9% of Recyclers in the South; 7% of recyclers in the Northeast].
- Those who live in the South (32%) are more likely than those in the Northeast (21%) or West (22%) to say they wish they recycled more. Southerners (11%) are also more likely than Northeasterners (7%) to say recycling is a hassle.

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle are significantly more likely than those who never recycle to say each of the following describe their feelings about recycling:
 - It is the right thing to do (71% vs. 22%)
 - It is the socially responsible thing to do (58% vs. 18%)
 - It is critical to reduce landfill space (56% vs. 20%)
 - It makes them feel good to recycle (53% vs. 11%)
 - It is critical to conserve natural resources (51% vs. 18%)
 - It is critical to reduce energy consumption (42% vs. 10%)
- Those who never recycle are significantly more likely than those who ever recycle to say:
 - Recycling is a hassle (29% vs. 8%)
 - They don't think it's necessary (9% vs. 2%)
 - Recycling doesn't matter (10% vs. 2%)

Possible headline – A majority of Americans believe recycling is the right thing to do and wish more people did it, while less than 1 in 10 believe it's a hassle.

4. What percentage more, if any, would you be willing to pay for a product if you knew it was...? (U.S. adults, n=2,013)

Easy and convenient to collect and take to a recycling center (or picked up at my home on a curbside program)

Americans would be willing to spend 13% more, on average, for a product if they knew it was easy and convenient to collect and take to a recycling center (or picked up at their home on a curbside program). More than half (56%) of Americans would pay more money for a product if it was easy and convenient to collect/take to a recycling center. 31% say they would pay 1%-10% more and 24% say they would pay more than 10% more for the product. 11% would pay 50% or more for a product if it was easy/convenient to take to a recycling center, while 44% say they would not pay any more for a product.

Gender differences

- Men (27%) are significantly more likely than women (22%) to say they would be willing to pay **more than 10%** for a product that had this.

Age differences

- Those ages 18-34 say they would be willing to pay 18% more, on average, for a product if they knew it was easy and convenient to collect and take to a recycling center (or picked up at their home on a curbside program). This average was significantly higher than those of any other age group [10% among those ages 35-44; 11% among those ages 45-54; 11% among those ages 55-64; 12% among those ages 65+].
- Younger adults ages 18-34 (70%) are significantly more likely than those ages 35-44 (57%), 45-54 (57%), 55-64 (46%), and 65+ (49%) to say they would pay any more money for a product if it was easy and convenient to collect and take to a recycling center.

HHI differences

- Interestingly, those with a HHI of less than \$50k would be willing to pay an average of 16% more for a product if they knew it was easy and convenient to collect and take to a recycling center (or picked up at their home on a curbside program). This average was significantly higher than the average among those with a HHI of \$75k+ (10%).

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (58%) are significantly more likely than those who never recycle (31%) to say they would pay any percentage more for a product if they knew it was easy and convenient to collect and take to a recycling center.

Possible headline – On average, Americans would be willing to spend 13% more for a product if they knew it was easy and convenient to collect and take to a recycling center (or picked up at their home on a curbside program).

Fully recyclable (i.e., all parts of the item can be recycled)

Americans would be willing to spend 13% more, on average, on a product if it was fully recyclable (i.e., all parts of the item could be recycled). Close to three in five (59%) Americans would be willing to pay any percentage more for a product if they knew it was fully recyclable. More than one in three (35%) would be willing to spend between 1%-10% more and close to one in four (24%) would be willing to spend more than 10% more on the product.

Gender differences

- Men (26%) are significantly more likely than women (20%) to indicate they would spend **more than 10%** on a product if they knew it was made of recycled materials.

Age differences

- Those ages 18-34 say they would be willing to pay 17% more, on average, for a product if they knew it was fully recyclable. This average was significantly higher than the average among those ages 45-54 (12%), those ages 55-65 (10%), and those ages 65+ (8%). Those ages 35-44 say they would be willing to pay an average of 15% more for a product if they knew it was fully recyclable, which is also significantly more than the average among those ages 55+.
- Those ages 18-44 (69%) are significantly more likely than those ages 45+ (50%) to say they would pay any percentage more for a product if they knew it was fully recyclable.

HHI differences

- Those with a HHI of less than \$50k would be willing to pay 14% more, on average, for a product if they knew it was fully recyclable, which is significantly more than the average among those with a HHI of \$100k+ (10%).

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (61%) are significantly more likely than those who never recycle (30%) to say they would pay any percentage more for a product if they knew it was fully recyclable.

Possible headline – On average, Americans would be willing to spend 13% more on a product if it was fully recyclable (i.e., all parts of the item could be recycled).

Made of recycled materials

Americans would be willing to spend an average of 10% more for a product if they knew it was made of recycled materials. 56% of Americans would be willing to spend any percentage more on a product if they knew it was made of recycled materials. More than 1 in 3 (34%) would be willing to spend between 1%-10% more and 23% would be willing to spend more than 10%. 44% would not be willing to pay any more for a product that was made of recycled materials.

Gender differences

- Men (26%) are significantly more likely than women (20%) to say they would be willing to pay **more than 10%** for a product that was made of recycled materials. Men (8%) are also more likely than women (5%) to say they would be willing to pay **50% or more** on a product if they knew it was made from recycled materials.

Age differences

- Those ages 18-34 say they would be willing to pay an average of 15% more for a product if they knew it was made from recycled materials. This average was significantly higher than those of any other age group [11% among those ages 35-44; 9% among those ages 45-54; 7% among those ages 55-64; 8% among those ages 65+].
- Those ages 18-34 (71%) are more likely than any other age group to say they would be willing to pay any percentage more for a product that was made of recycled materials [58% of those ages 35-44; 48% of those ages 45-54; 47% of those ages 55-65; 48% of those ages 65+].
- Those ages 35+ (50%) are more likely than those ages 18-34 (29%) to say they would not be willing to pay any more for a product that was made of recycled materials. Those ages 45+ (52%) are also more likely to say they would not be willing to pay any more for a product that was made of recycled materials than those ages 35-44 (42%).

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle would be willing to spend an average of 11% more on a product if they knew it was made of recycled materials. This was significantly higher than the average among those who never recycle (4%).
- Those who ever recycle (59%) are significantly more likely than those who never recycle (23%) to say they would pay any percentage more for a product if they knew it was made of recycled materials.

Possible headline –Americans would be willing to spend an average of 10% more for a product if they knew it was made of recycled materials.

5. *When making a purchase, how often, if ever, do you look for information on whether or not the product is made from recycled materials? (U.S. adults, n=2,013)*

Two thirds (66%) of Americans say they ever look for information on whether or not the product is made from recycled materials when making a purchase. More than one in five (22%) say they always/often do this. More than two in five (44%) say they sometimes do this and more than one in three (34%) say they never do this.

Gender differences

- Men (25%) are significantly more likely than women (19%) to say they always/often look for information on whether or not a product is made from recycled materials when making a purchase. Men (8%) are also two times more likely to say they always do this than women (4%).

Age differences

- Those ages 18-34 (71%) are more likely than those ages 55+ (62%) to say they ever do this.
- Those ages 35-44 (9%) are twice as likely as those ages 18-34 (4%) or 65+ (4%) to say they always do this.

Regional differences

- Those who live in the West (26%) and Northeast (23%) are more likely than those who live in the Midwest (16%) to say they always/often do this. They are also more than 2 times more likely to say they always do this (8% of those in the West and Northeast vs. 3% of those in the Midwest).

HHI differences

- Those with a HHI of \$50k+ (26%) are more likely than those with a HHI of less than \$50k (17%) to say they always/often do this.

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (69%) are more likely than those who never recycle (19%) to say they ever look for information on whether or not a product is made from recycled materials when making a purchase. Furthermore, those who ever recycle (23%) are more than 10 times more likely to say they always/often do this than those who never recycle (2%).

Possible headline – More than one in five Americans say that when making a purchase, they always/often look for information on whether or not the product was made from recycled materials.

6. *How strongly do you agree or disagree with each of the following statements? (U.S. adults, n=2,013)*

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

More than 3 in 5 (62%) Americans agree that if a product is not easy/convenient to recycle, they probably would not recycle it. 17% strongly agree and 44% somewhat agree with this statement. More than 1 in 3 (38%) Americans disagree with this statement, with 28% saying they somewhat disagree and 10% strongly disagreeing.

Age differences

- Those ages 18-44 (67%) are more likely to agree with this statement than those ages 45+ (57%).

Regional differences

- Those who live in the West (65%) or South (64%) are more likely to agree with this statement than those who live in the Northeast (56%).

Differences between those who ever recycle vs. those who never recycle

- Those who never recycle (77%) are more likely to agree with this statement than those who ever recycle (61%). Those who never recycle (46%) are also more than 3 times more likely to strongly agree with this statement than those who ever recycle (15%).

Possible headline – More than 3 in 5 Americans agree that if a product is not easy/convenient to recycle, they probably would not recycle it.

I would appreciate it if manufacturers designed products to be easier for consumers who recycle to disassemble in preparation for recycling.

The vast majority (86%) of Americans agree with this statement, with close to one in three (32%) saying they strongly agree and more than half (54%) saying they somewhat agree. 14% of Americans disagree with this statement, with 11% somewhat disagreeing and 4% strongly disagreeing.

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (87%) are more likely to agree with this statement than those who never recycle (70%). Those who ever recycle (33%) are also more likely to strongly agree with this statement than those who never recycle (22%).

Possible headline – The vast majority of Americans agree that they would appreciate it if manufacturers designed products to be easier for consumers who recycle to disassemble in preparation for recycling.

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.

More than 4 in 5 (81%) Americans agree with this statement, with 31% strongly agreeing and half (50%) saying they somewhat agree. 19% of Americans say they disagree with this statement, with 14% saying they somewhat disagree and 5% saying they strongly disagree

Gender differences

- Men (22%) are significantly more likely to disagree with this statement than women (16%).

Regional differences

- Those who live in the West (39%) are more likely to strongly agree with this statement than those who live in any other region [the South (26%), Midwest (30%) or Northeast (32%)].

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (83%) are more likely to agree with this statement than those who never recycle (59%). Those who ever recycle (32%) are also more than two times more likely to strongly agree with this statement than those who never recycle (15%).

Possible headline – More than 4 in 5 Americans agree that they 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.

Recycling collection sites need to be more readily accessible to consumers.

The vast majority (90%) of Americans agree with this statement. 44% strongly agree and 46% say they somewhat agree. Only 10% of Americans disagree with this statement, with 7% saying they somewhat disagree and 3% saying they strongly disagree.

Gender differences

- Men (12%) are significantly more likely to disagree with this statement than women (8%).

Regional differences

- Those who live in the South (93%) are more likely to agree with this statement than those who live in the Midwest (88%) or West (87%). Those who live in the South (48%) are also more likely to strongly agree with this statement than those who live in the Midwest (38%).

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (91%) are more likely to agree with this statement than those who never recycle (82%).

Possible headline – The vast majority of Americans agree recycling collection sites need to be more readily accessible to consumers.

The government should pay for recycling programs when they are not readily available to consumers.

More than 3 in 5 (62%) Americans agree with this statement, with 21% saying they strongly agree and 42% saying they somewhat agree. 38% of Americans disagree with this statement, with close to 1 in 4 (24%) saying they somewhat disagree and 14% saying they strongly disagree.

Gender differences

- Men (41%) are significantly more likely to disagree with this statement than women (35%).

Age differences

- Those ages 18-54 (69%) are more likely to agree with this statement than those ages 55+ (51%). Those ages 18-64 (66%) are also more likely to agree with this statement than those ages 65+ (45%).

Possible headline – More than 3 in 5 Americans agree the government should pay for recycling programs when they are not readily available to consumers.

Manufacturers and/or retailers should pay for recycling programs when they are not already available to consumers.

Close to 7 in 10 (68%) Americans agree with this statement, with 1 in 5 (20%) saying they strongly agree and close to half (47%) saying they somewhat agree. Just under 1 in 3 (32%) disagree with this statement, with 22% saying they somewhat disagree and 10% saying they strongly disagree.

Age differences

- Those ages 18-34 (75%), 35-44 (68%) and 55-64 (68%) are significantly more likely to agree with this statement than those ages 65+ (58%). Those ages 18-34 are also more likely to agree with this than those ages 45-54 (64%).

Differences between those who ever recycle vs. those who never recycle

- Those who ever recycle (69%) are more likely to agree with this statement than those who never recycle (53%).

Possible headline – Close to 7 in 10 Americans agree manufacturers and/or retailers should pay for recycling programs when they are not already available to consumers.

Methodology

This survey was conducted online within the United States from November 3-5, 2014 among 2,013 adults ages 18 and older, by Harris Poll on behalf of ISRI via its Quick Query omnibus product. Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was used to adjust for respondents' propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Poll avoids the words "margin of error" as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Poll surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in the Harris Poll panel, no estimates of theoretical sampling error can be calculated.