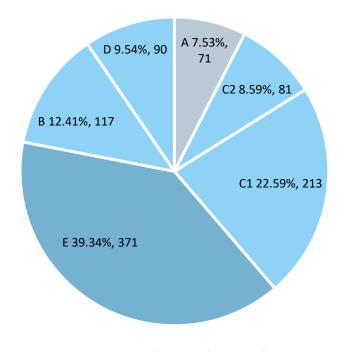
Consumer Insights Glass Recycling - Scotland

- Consumer research conducted June 2019
- Research via Toluna Quick Surveys https://www.quicksurveys.com/
- Total respondents: 946 (All in Scotland)
- General survey statistics;
 - Gender;
 Male= 364(38.48%) Female = 582(61.52%)
 - Age;

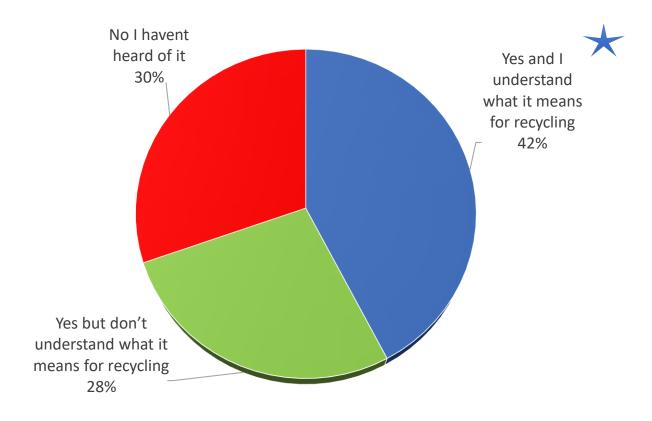
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Less than 18= 15(1.59%)
18-34= 326 (34.46%)
35-54= 367(38.79%)
55+ = 238( 25.16%)
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Social Grade - SEG

Q1. Have you heard of plans for a Deposit Return Scheme on single use beverage packaging?

Scotland - Total Respondents: 946

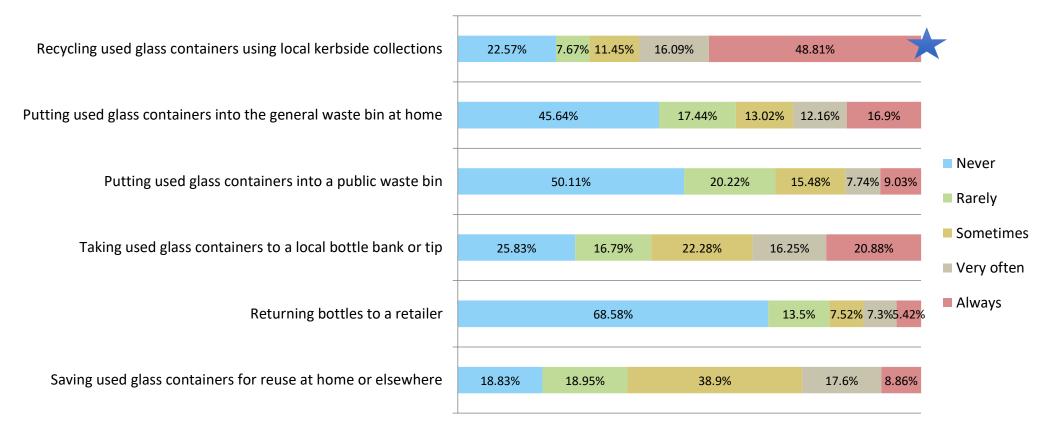




Tonly 42% of Scottish consumers have heard of a DRS and fully understand what it means for recycling

Q2. How often do you use the following methods to dispose of your used glass packaging?

Question Type: Multiple Cross | Total Respondents: 946

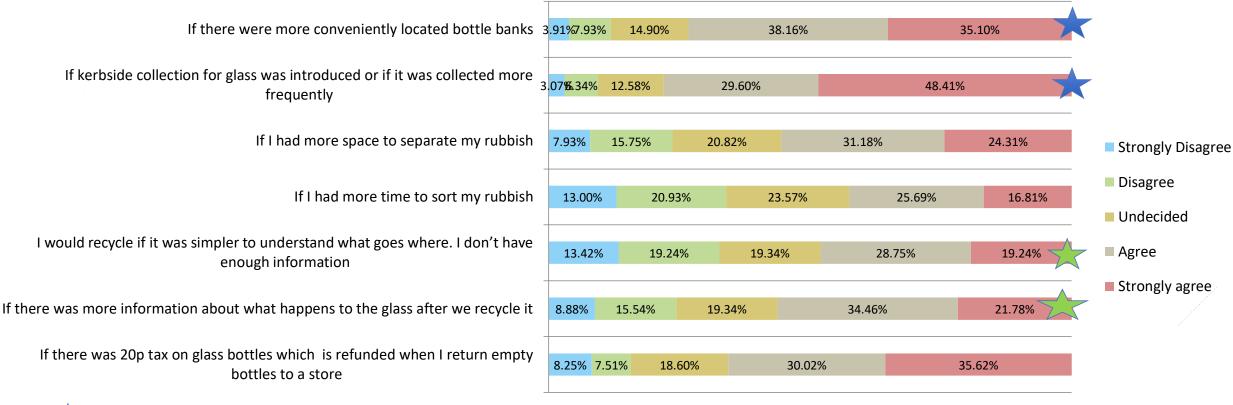




65% of households in Scotland very often or always use kerbside collection to recycle their glass

Q3. What would make you more likely to recycle glass packaging?

Question Type: Single Matrix | Total Respondents: 946

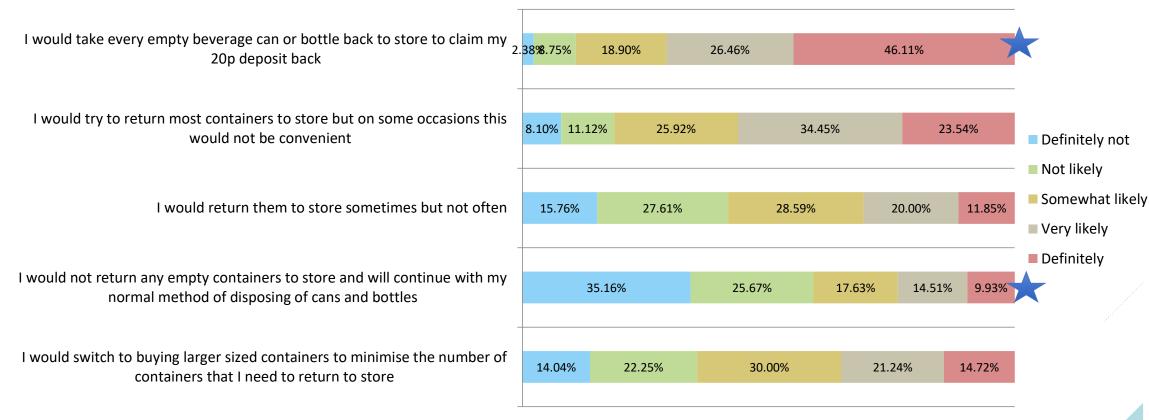




Consumers favour kerbside collection & bottle bank over DRS to help them recycle more glass Better communication could help to increase glass recycling

Q4. If a Deposit Return Scheme is implemented involving a 20p surcharge on every beverage can, glass bottle or plastic bottle sold, how likely would you be to do the following?

Question Type: Multiple Cross | Total Respondents: 946

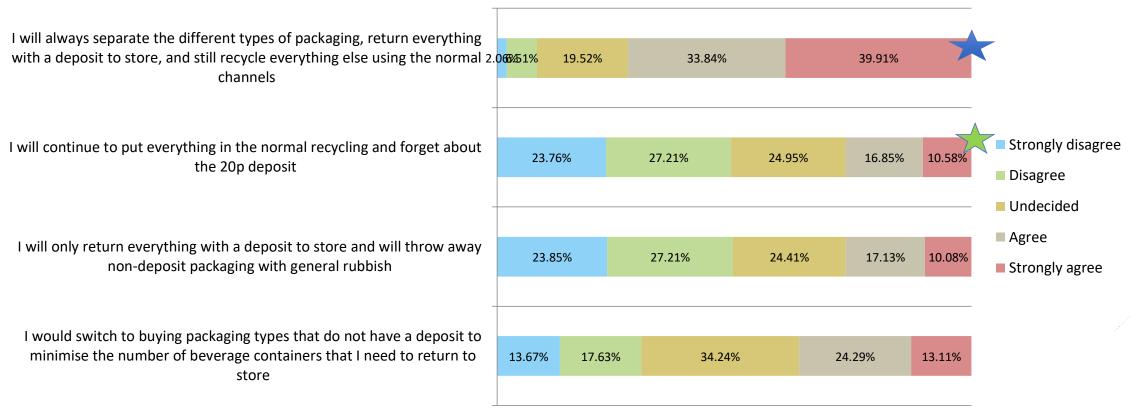




Suggests a 72% to 75% participation rate based on top two responses

Q5. If a Deposit Return Scheme is implemented involving a 20p surcharge on every beverage can, glass bottle or plastic bottle sold, how likely would you be to do the following?

Question Type: Multiple Cross | Total Respondents: 946





Suggests a participation rate of 73% (top 2 responses), but as low as 48% (top 3 responses) Suggests that 27% will forgo the deposit and recycle via current methods

Q6. How strongly do you agree/disagree with the following statements on what might prevent you from recycling used glass containers?

Question Type: Multiple Cross | Total Respondents: 946

I sometimes put empty glass containers into the general waste 36.41% 21.05% 12.67% 25.67% because they are dirty or mouldy There is no kerbside collection of glass where I live 36.1% 14.98% 15.62% 28.56% 7.% I have no car to travel to a bottle bank 39.31% 19.98% 7.13% 14.47% 20.52% Strongly Disagree There are no conveniently located bottle banks Disagree 27.66% 21.26% 13.88% 23.43% 15.51% Undecided I am too busy to recycle glass containers 43.48% 31.41% 11.85% 10.33%4.46 Agree I do not have space at home to separate glass containers from the 26.51% 11.42% 38.25% 16.38% 8.84% rest of my rubbish Strongly Agree It is not convenient for me to recycle glass containers 42.89% 26.08% 11.42% 13.9% I don't see the point in recycling glass containers 58.74% 23.65% 8.74% 6.61% 599 There is no incentive for me to recycle glass containers 23.07% 33.26% 17.58% 20.83% 8.96%



Better communication could help to increase glass recycling Incentives to recycle, rank below kerbside collection and convenient bottle bank locations

Thank you!

For more information:

https://www.britglass.org.uk/our-work/recycle-more