

# Recycling Terms Survey

*March 2021*



**The Association of  
Plastic Recyclers**

# Background and Methodology/1

GLS Research was commissioned by the Association of Plastic Recyclers to conduct a web-based survey of a nationally representative sample of 1,600 U.S. adults (18 years of age or older) concerning recycled content and recyclability claims.

Specifically, the study was designed to collect systematic information from the U.S. adult population to determine:

- Awareness and understanding of the claims found on labels to describe the recycled contents of products and/or packaging
- Consumer understanding of the differences between post-industrial, pre-consumer sources such as “plant scrap” and traditional post-consumer recycling (e.g., curbside pickup)
- The extent to which informed awareness and understanding of recycling claims may impact consumer behavior
- Consumer understanding of the degree of recycled content based on a specific description provided on the package
- Pertinent differences among the U.S. adult population with respect to each of the topical areas addressed above

# Background and Methodology/2

GLS Research, in consultation with the Association of Plastic Recyclers, designed an online survey instrument to obtain the desired market information from the adult U.S. population.

In order to qualify for the survey, respondents had to be at least 18 years old.

In order to ensure a representative sample of U.S. adults, the sample of **1,600 respondents** was pre-stratified by gender, age group, and geography according to the most recent U.S. Census Current Population Survey estimates. This ensured that the sample of 1,600 respondents accurately reflects the adult population distribution of the United States, as well as mitigates the well-documented tendency for women to respond to surveys more often than men, and the skew towards older people responding more readily to surveys than younger people.

The data was collected between February 9 – 22, 2021.

**The margin of error for a sample size of 1,600 respondents is no more than 2.5 percentage points with a 95% level of confidence.**

# Key Findings



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# Key Findings

- More than four in ten adults (42%) mistakenly believe that the label “[contains recycled content](#)” on packaging means that the product is made entirely from recycled materials
- Seven in ten adults (71%) believe packaging labeled “[100% certified recycled content](#)” means that the product is entirely made from recycled materials
- **Nearly all adults do not understand the exact meaning of "made with post-industrial recycled material" (97%) nor the exact meaning of "made with pre-consumer recycled material" (98%) and are likely to be unable to differentiate between these terms and the term "made with post-consumer recycled material."**
- The recycling term “mass balance” is virtually unknown among U.S. adults.
- Adults are [much more likely](#) to know the definition for “made with recycled content” than for all the other recycling terms



# Key Findings/3

- Adults between 35 and 44 years old are more likely than other age groups to buy frequently purchased products if it is labeled “[pre-consumer recycled material](#)” or “[post-industrial recycled material](#),” while adults 25 to 44 are more likely to purchase a product labeled “[made with recycled material](#)”
- Adults 65 and older are the least likely to know the meaning of “[made with post-consumer recycled material](#),” “[made with post-industrial recycled material](#),” or the recycling term “[mass balance](#),” and were the most likely to say it [made no difference](#) to them in purchasing if a product was labeled as “made with post-consumer recycled material”

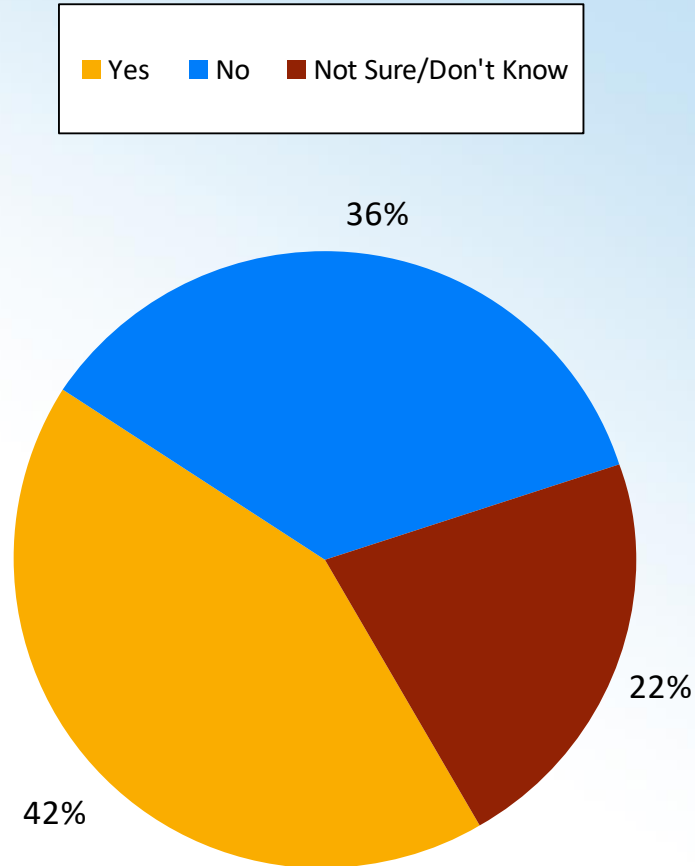


# Detailed Findings



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# Adults Unsure About Entire Product Made From Recycled Materials If Labelled “Contains Recycled Content”

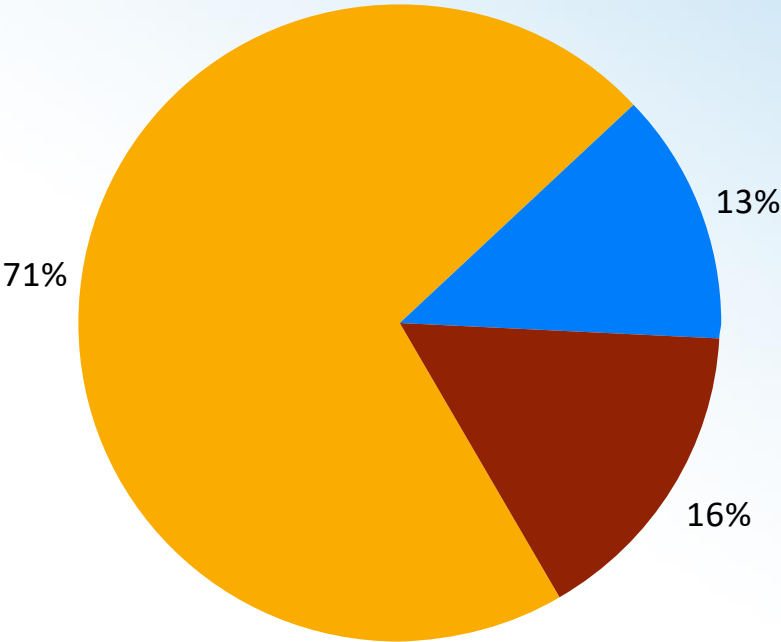
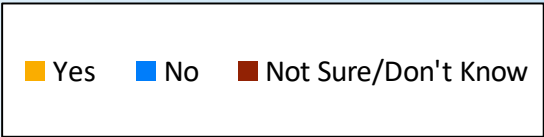


- About four in ten (42%) adults believe that the product is made entirely of recycled content if they see “contains recycled content” on the packaging.
- Adults who are 25 to 34 years old are especially more likely to believe that the product is made entirely of recycled content (59%), while adults who are 65 or more years old are especially more likely to believe that the product is not made entirely of recycled content (49%)





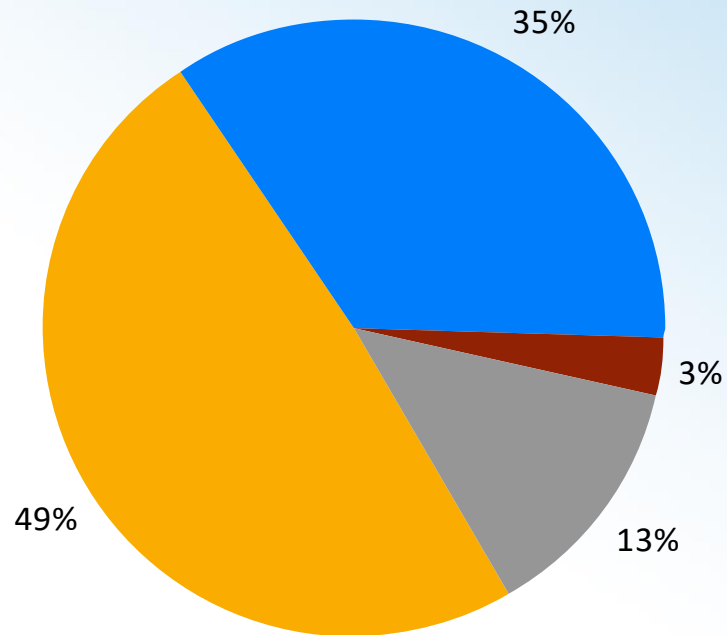
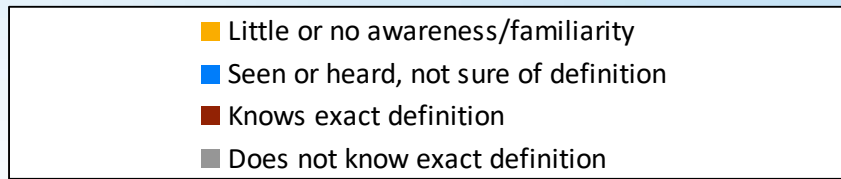
# Most Adults Are Sure About Entire Product Made From Recycled Materials If Labelled “100% Certified Recycled Content”



About seven in ten (71%) adults believe that the product is made entirely of recycled content if they see “100% certified recycled content” on the packaging, and only one in eight (13%) do not believe that the product is made entirely of recycled content



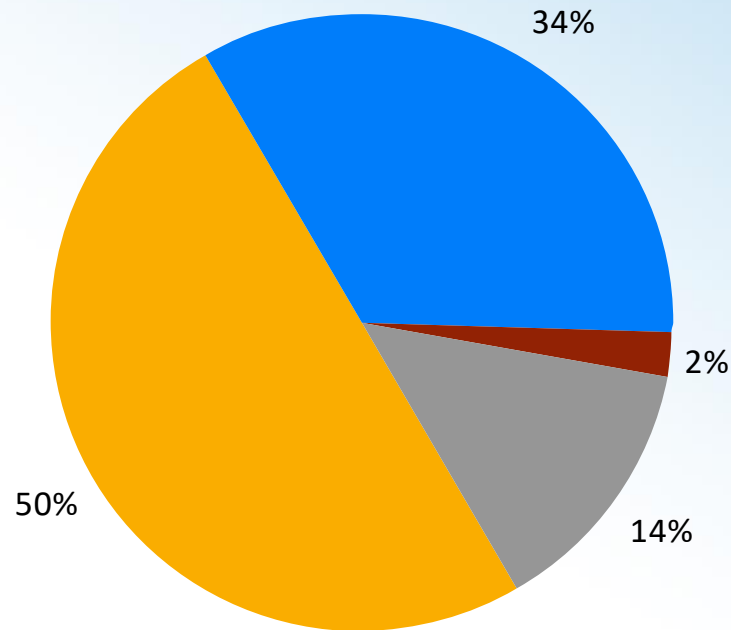
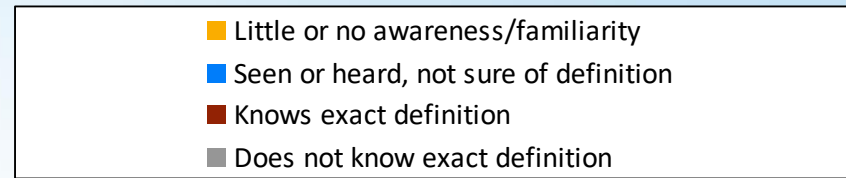
# Nearly All Adults Do Not Know What The Claim “Made With Post-Industrial Recycled Material” Means



- One-half (49%) of adults have little or no awareness of this claim and only 3% know the exact definition of “made with post-industrial recycled material
- Adults who are 65 or more years old are especially likely to have little or no awareness of or knowledge about this claim (60%)



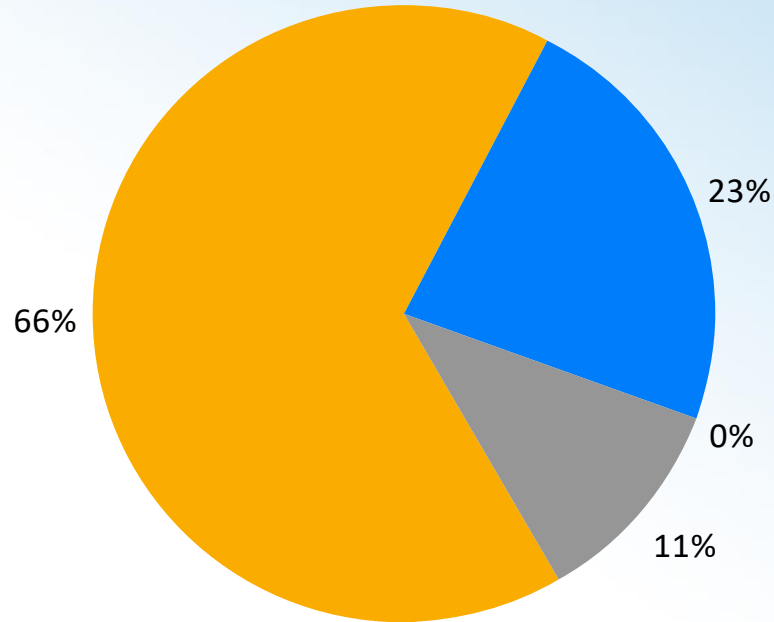
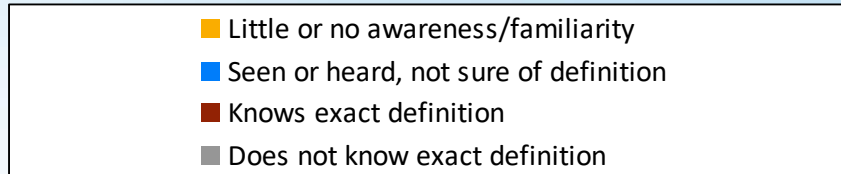
# Nearly All Adults Do Not Know What The Claim “Made With Pre-Consumer Recycled Material” Means



One-half (50%) of adults have little or no awareness of this claim and only 2% know the exact definition of “made with pre-consumer recycled material”



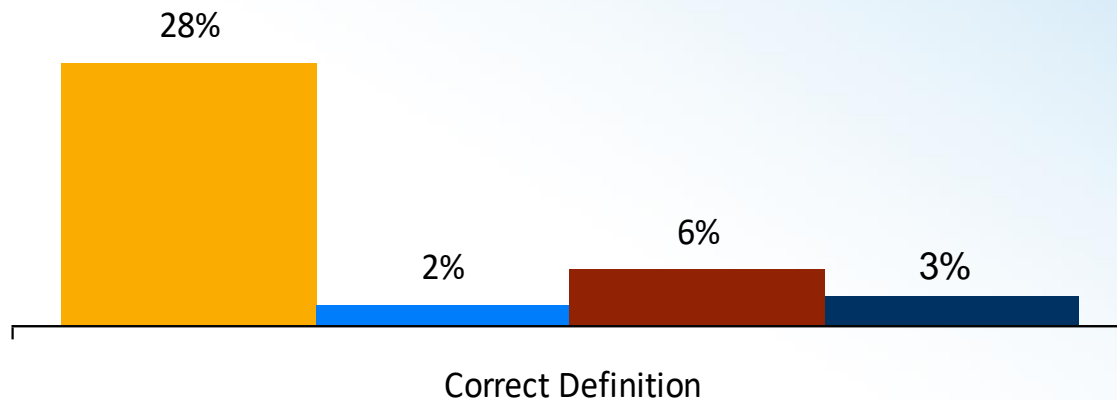
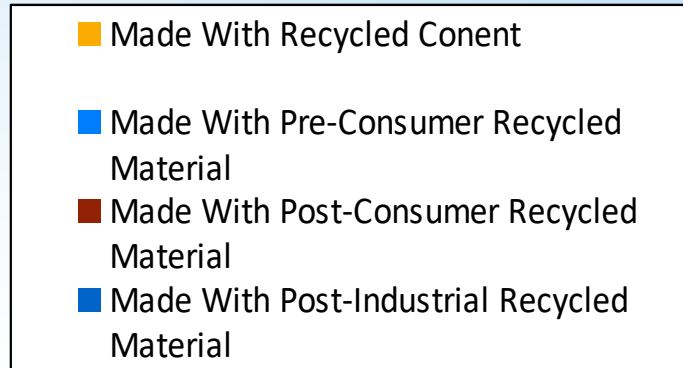
# Virtually No Adults Know What The Term “Mass Balance” Means



- Two-thirds (66%) of adults have little or no awareness of this term and less than 1% know the exact definition of the term “mass balance”
- Adults who are 65 or more years old are especially likely to have little or no awareness of or knowledge about this term(84%)



# Adults Were Far More Likely To Correctly Define The General Claim “Made With Recycled Content” Than More Specific Recycling Claims



Over one-quarter (28%) of adults were able to correctly define the claim “made with recycled content,” while only 2% were able to define “made with pre-consumer recycled material,” 6% were able to give the correct definition of “made with post-consumer recycled material,” and only 3% could correctly define “made with post-industrial recycled material”



# Respondent Demographics And Characteristics



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# Respondent Demographics and Characteristics/1

|               | TOTAL |                        | TOTAL |
|---------------|-------|------------------------|-------|
| <b>Gender</b> |       | <b>Education</b>       |       |
| Male          | 49%   | High School or Less    | 23%   |
| Female        | 51    | Some college/Trade     | 28    |
| <b>Age</b>    |       | Graduated College      | 31    |
| 18-24         | 12%   | Graduate School        | 18    |
| 25-34         | 17    | <b>Household Size</b>  |       |
| 35-44         | 17    | One                    | 22%   |
| 45-54         | 17    | Two                    | 37    |
| 55-64         | 17    | Three or more          | 41    |
| 65 or older   | 21    | MEAN                   | 2.6   |
| MEAN          | 47.6  | <b>Ethnicity</b>       |       |
| <b>Region</b> |       | White                  | 77%   |
| Northeast     | 18%   | Black-African-American | 10    |
| Midwest       | 21    | Asian/Asian-American   | 6     |
| South         | 38    | Other                  | 8     |
| West          | 23    | <b>BASE</b>            |       |
| <b>BASE</b>   |       | (1600)                 |       |

- Nearly four in ten (37%) of respondents lived in a two person household
- About three-fourths (77%) of respondents were white
- About one-half of respondents had college (31%) or graduate (18%) degrees

# Respondent Demographics and Characteristics/2

|                         | TOTAL         |
|-------------------------|---------------|
| <b>Household Income</b> |               |
| Less than \$35,000      | 24%           |
| \$35,000-\$49,999       | 13            |
| \$50,000-\$74,999       | 18            |
| \$75,000-\$99,999       | 15            |
| \$10,000 or more        | 22            |
| Prefer not to say       | 7             |
| <b>BASE</b>             | <b>(1600)</b> |

About one-quarter (24%) of respondents reported an annual household income of less than \$35,000, while about one in five (22%) reported incomes of \$100,000 or more

