

Center for Sustainable Behavior & Impact

# 2022 Recycling Confidence Index

## Baseline Measurement of Confidence in Recycling

### Why This Matters

**Approximately half of all recyclables in U.S. households never get recycled—amounting to 15 million tons of material each year.** The reasons why are complex and range from collection program design and confusion over what can be recycled, to negative media coverage about the recycling industry and packaging design and labeling. However, at the heart of the issue is a lack of confidence—both in people’s confidence in their own ability to properly recycle and in the outcomes and impact of their recycling.

To address this challenge, The Recycling Partnership’s Center for Sustainable Behavior & Impact created the Recycling Confidence Index (RCI) in partnership with OpinionWorks. The RCI establishes a baseline benchmark for confidence in recycling and an index to track, quantify, and qualify confidence levels over time. Our goal was to understand what is driving people’s confidence in recycling so as an industry we can make strategic decisions about how to positively influence it. Additionally, when the media or other groups make generalizations about public trust in recycling, this study provides us evidence to support our claims.



What this research makes clear is that to build trust and confidence in recycling, people need more than containers and recycling guides. Local recycling program decision makers need to invest as much in communications and outreach as they do in recycling collection services. When we consider how much brands spend to get their products into people’s homes, the investment to help get those same products properly recycled feels justified.

Our communications and outreach need to focus not only on making it clear how and what to recycle, but also on what happens to recyclables, and why recycling matters.



#### People need reassurance that their materials are actually recycled.

*“There’s no proof [that recycling is working]...I think that people have forgotten why they [recycle]... I think people are just going through the motions.”*

*“Just let us know that it’s working. I think we’re starting to do our part. Let’s see if it paid off.”*

*“They’re not transparent at all as to where [it goes]. It’s a mystery. ...We have heard that they send it all to another country and that other country, they’re not accepting it anymore.”*

\*Quotes from respondents to the 2022 Recycling Confidence Index survey.

## Research Methodology & Initial Results

To establish a baseline measurement of confidence in recycling we combined quantitative and qualitative methods. This included an online survey conducted with a representative national sample of 3,127 respondents and focus groups conducted via Zoom in groups of three to six with a total of 23 people across five audience personas identified in our segmentation research.

Both approaches evaluated 10 factors that impact confidence in recycling and can be influenced by The Recycling Partnership, local recycling programs, and industry partners. The factors were a combination of practical, ‘nuts and bolts’ operational factors and perceptive, intrinsic values factors as discussed below.

The result was a current baseline RCI of 630 out of a possible score of 1000, where Perceptions-based Factors scored overall higher than their Programmatic counterparts. This tells us is that people believe in the abstract good of recycling, but struggle with practical questions and daily operations.

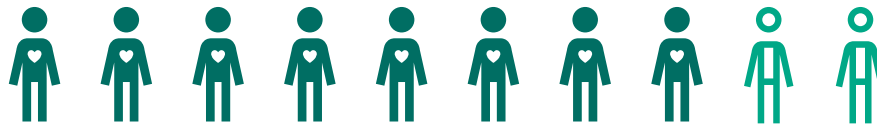


# Key Findings

## Finding 1

### Recycling is a strongly felt social good.

Most people believe recycling makes a difference (77%), has a positive impact (77%), and is worth the effort (72%). People are motivated to recycle because it reduces waste and protects the planet and about two out of three people also believe recycling benefits the community by creating jobs. This value is so deep-seated that more than half of people admitted they feel guilty when they do not recycle.



Almost 80% of people believe recycling makes a difference.

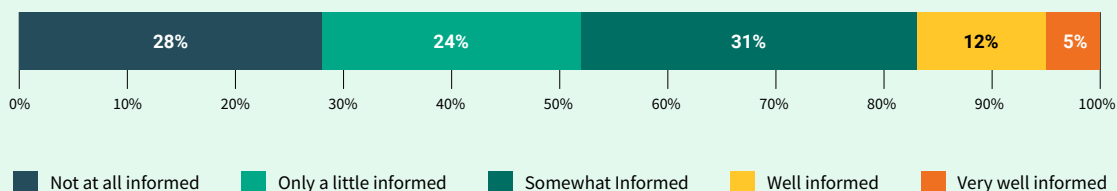
## Finding 2

### There is a big opportunity to improve trust by increasing communication and transparency around what happens to recyclables once they leave the home.

Despite strong public support for recycling, there is relatively low confidence that recycled materials are handled properly once they are collected and that they eventually are made into new products. Very few people – just 17% – feel well informed about what happens to their recycling, and less than half (47%) believe their recyclables are made into new things. The rest believe that happens only sometimes, rarely, never, or they are not sure. Additionally, one in five people believe their recycling is often just dumped in the trash.

This lack of confidence is negatively affecting recycling behavior, making people less motivated to recycle and more likely to think it is not worth the effort. Additionally, the research showed that only half of people remember seeing positive stories or images about recycling in the news or social media. This reveals a missed opportunity for the industry and local programs to help improve public trust through storytelling that demonstrates how and why the system works.

### How informed are you about what happens to your recycling after it leaves your home?




## Regular communications about what and how to recycle, and access to better and service positively impact people’s confidence, behavior, and service satisfaction.

People who remember receiving recycling communications, are more likely to:

- ✔ Be satisfied with their local recycling service (77% vs. 58%)
- ✔ Believe their recyclables are always or usually made into new things (59% vs. 43%)
- ✔ Feel well or very well informed about what happens to their recycling after it leaves their home (34% vs. 12%)
- ✔ Give themselves a much higher recycling participation rate (6.88 vs. 5.10 out of 10)
- ✔ Rate themselves much higher for how much they know about recycling (6.71 vs. 4.99 out of 10)
- ✔ Say that recycling is a high priority in their daily life (67% vs. 40%)

However, while communications are effective in boosting recycler’s confidence, they are underutilized. **Only one in four people recall seeing any kind of a communication from their local recycling program within the past year.**



**75% cannot recall receiving a communication from their local program.**

*“If I was better informed, maybe I would be able to explain better to the other members of my family. Then, they’ll have no reason not to recycle.”*

*“I need some data. I need to know that you’re not just picking my stuff to make me happy and dumping it somewhere.”*

\*Quotes from respondents to the 2022 Recycling Confidence Index survey.

**The types of communications people said would give them more confidence in their ability to recycle include info cards, and stickers or signs on recycling with visuals of what can and can’t be recycled.**



Overall, six in 10 people were very or somewhat satisfied with their recycling service. Curbside households had significantly higher satisfaction rates (81%) as well as those who had wheeled carts (84%) and those who had in-home bins (76%). People who felt they didn’t have what they need to do a good job recycling, were less likely to be satisfied with their service.

When asked what their local recycling program could provide or do to help them, one-third asked for more, larger, or better collection . Additionally, more than half (58%) of people who said they do not have everything they need to recycle well, described their collection as too small to handle all of the recyclables.

## Conclusions & Opportunities

Based on the findings of the 2022 Recycling Confidence Index, the industry’s focus needs to be on matching investments in recycling communications with those made in infrastructure. To have an impact, these communications need to boost people’s confidence in their own recycling knowledge and in the performance of the recycling system as a whole. By boosting confidence levels, we can better motivate people to recycle more and recycle better.

The Center intends to re-evaluate RCI at a regular cadence to measure changes in attitudes and beliefs about recycling and also begin measuring factors outside of the home that impact confidence – such as trust in packaging, labeling, and different material types.

In the interim, here are the three biggest opportunities to increase recycling confidence and foster proper recycling behaviors:



**Tell local truths about recycling that counteract the flow of recycling myths and misinformation**, and proactively share recycling success stories with the public to demonstrate how and why the system works.



**Reinforce confidence and satisfaction with feedback to participating recyclers** on how they are doing individually and collectively, and what is happening to their recyclables once they leave their homes.



**Be a partner in helping people overcome recycling barriers.** Increase the ease and convenience of recycling by providing supports, such as adequate in and outside of the home, frequent collection, instructional signage/posters/magnets, and regular, ongoing information about what can and can’t be recycled.



**We conducted an online user test of 1,197 people and interviewed 20 people across the country to get our questions answered.**

[Read more about our findings.](#)



**Download the User Testing and Best Practices Guide for recommendations to improve the design your of informational materials.**

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