



INCPEN's UK & Ireland Citizens' Research 2025

INCPEN's vision is to advance circular economy packaging systems for a net zero carbon world.

INCPEN is a collaborative packaging organisation that works with governments and across the packaging value chain to deliver the best outcomes and best value for the environment. Its membership includes global packaging manufacturers, brands, retailers, reproprocessors, recyclers and others.

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At a Glance: Insights & Highlights

This summary presents key insights and highlights from INCPEN’s 2025 UK and Ireland Citizens’ Research, exploring citizens views on: climate and the environment, deposit return schemes (DRS), their confidence in recycling, and household recycling services.

These results provide valuable insights for a variety of stakeholders including all four UK governments; PackUK and its Efficiency and Effectiveness Technical Advisory Committee and Communications and Behaviour Change Advisory Group; the UK Deposit Management Organisation (UK DMO); Re-Turn in Ireland and the wider packaging industry to advance packaging circular economy and achieve net-zero goals.

Key Insights

Theme	2025 Headline Insight	Trend vs. 2024
Environment	Sewage pollution remains citizens’ top environmental concern in both UK & Ireland.	↑ Higher priority overall
Climate Change	Concern remains stable year-on-year.	↔ Steady
Circular Economy Behaviours	High willingness to buy recycled (91%), repair (88%), and buy second-hand (80%), though renting remains low (49%).	↔ Consistent
Deposit Return Schemes	Awareness remains low in the UK; strong but improvable in Ireland.	↔ Stable
Recycling Confidence	Highest in Wales and Northern Ireland; lowest in England, Scotland and Ireland.	↓ Declining overall
Household Recycling Services	Services rated above average, but citizens want better feedback on results.	↔ Steady

Key Highlights

Climate & Environment

- Sewage discharges into rivers and seas are the top environmental priority across all nations.
- Potholes and loss of natural habitats follow closely behind.
- Climate change concern remains steady (UK 7.2; Ireland 7.2).
- Citizens view recycling and reducing home energy use as the most effective carbon-cutting actions.

Circular Economy Behaviours

- Willingness to engage in sustainable actions continues to exceed actual behaviours.
- 9 in 10 are willing to buy products with recycled content; 8 in 10 would buy second-hand or refurbished.
- Leasing or renting remains the least popular.

Deposit Return Schemes (DRS)

- UK: Awareness remains low—most citizens don't know start dates, deposit levels, or materials in scope.
- Ireland: Strong awareness of the new Re-Turn DRS (74% know the deposit is 15 cents; 71% know in-scope materials).
- More public information could improve clarity in both nations.

Public Confidence in Recycling

- Confidence remains highest in Wales (38%) and Northern Ireland (33%), lowest elsewhere (16% for England, Scotland and Ireland).
- Lack of information about what happens to recycling remains the biggest barrier to confidence.

Household Recycling Services

- Citizens rate services above average across all nations (6.9–7.6).
- Feedback to residents is consistently weak (scores ≤5).
- Improving communication on recycling outcomes offers the biggest opportunity for progress.

Citizens' engagement and support for circular economy actions remain strong, but trust, transparency, and communication are key to accelerating behaviour change and achieving environmental goals across the UK and Ireland.

Executive Summary

This Industry Council for Packaging & the Environment (INCPEN) summary report presents key findings from its citizens' research taken forward in the United Kingdom & Ireland during June 2025. Key findings across the following four areas of citizens research are:

Climate, Environment and Circular Economy Behaviours

Citizens in the UK consider sewage discharges into rivers and the sea the top environmental priority for the government, reflecting the issue they consider most important personally.

Other key environmental priorities for the government include potholes in roads (7.8), loss of natural habitats and species (7.6), and climate change (7.2). Compared to last year, most environmental priorities for the government have increased, although climate change has broadly remained the same (7.2 for 2025 and 7.1 for 2024).

Citizens in Ireland also consider sewage discharges into rivers and the sea a top environmental priority for their government, while potholes on roads are the issue they view as most important to them personally.

Other environmental priorities for the Irish Government highlight: loss of natural habitats and species (7.7), and climate change (7.2). Compared to last year, environmental priorities for the Irish Government have generally increased, though climate change has broadly stayed the same (7.2 for 2025 & 7.3 in 2024).

Citizens believe that minimising home energy use and recycling are the most effective ways for society to reduce carbon emissions. Broadly across all nations, citizens selected these options as the most effective, compared to driving less, taking fewer flights, buying less, consuming less meat and dairy, and having fewer children. This is consistent with last year's results.

UK citizens' willingness to adopt circular economy behaviours (at least in principle) continues to far exceed their current actions. Strong majorities of UK citizens say they would be willing to buy products with recycled content (91%), send products for repair (88%), buy second hand (80%), and buy refurbished (80%). The exception is renting or leasing, with just under half (49%) open to this.

Deposit Return Scheme (DRS)

As expected, because public awareness campaigning is due to take place in 2027, currently citizens in the UK have low knowledge and awareness of DRS. Most UK citizens are unaware of their nation's DRS start date, do not know the deposit amount (85%), do not know the in-scope materials (79%), nor feel they have received clear information about the places where they could return their empty DRS packaging (80%). This is consistent with UK citizens' views in 2024. Awareness and understanding of DRS are likely to increase year on year as the 1 October 2027 launch approaches, particularly as the UK Deposit Management Organisation (UK DMO) becomes more operational in the coming years.

Citizens in Ireland continue to have good knowledge and awareness of DRS. The majority of Irish citizens know the deposit level for a single beverage item is 15 cents (74%), are aware that plastic drinks bottles and metal cans are the in-scope materials (71%) and agree they have received clear information about where to return their empty DRS packaging (53%). This is broadly similar to Irish citizens' views in 2024. While this represents good knowledge and awareness across Ireland, there is still room for improvement - particularly as 29% of Irish citizens either tend to disagree or strongly disagree when asked whether they had received clear information about where to return their empty DRS packaging.

Public confidence in recycling

There is a divergence in citizens' confidence in recycling, with significantly higher confidence in Wales and Northern Ireland, compared to England, Scotland and Ireland. Net confidence scores for each nation in 2025 were: England (16%), Northern Ireland (33%), Scotland (16%), Wales (38%), and Ireland (16%). Net confidence scores have decreased in all nations since 2021, with the largest reductions observed in England, Scotland and Ireland.

Across all nations, the factor that most positively influences citizens' confidence in recycling is having a good service that is reliable and well designed. Scores for each nation in 2025 were: England (40%), Northern Ireland (42%), Scotland (37%), Wales (43%), and Ireland (41%). Other factors that scored highly across nations included receiving information from councils on what happens to recycling and information on how well the local area is performing. These factors have consistently been the highest rated by citizens since 2021.

Across all nations, the factor that most negatively influences citizens' confidence in recycling is a lack of information about what happens to recycling once it is collected. Scores for each nation in 2025 were: England (35%), Northern Ireland (32%), Scotland (33%), Wales (28%), and Ireland (35%). Having a lack of information has consistently been the top score with citizens since 2021.

Household recycling services

The overall quality of recycling collection services across all nations scores above average. All nations do have the opportunity to improve their average scores to achieve an 'excellent' rating. Overall recycling scores for each nation in 2025 were: England (7.1), Northern Ireland (7.6), Scotland (6.9), Wales (7.2), and Ireland (7.6). These scores have remained broadly consistent with citizens since 2021.

Providing citizens with feedback (e.g. what happens to the materials and how successful the scheme is) continues to represent an area for improvement with citizens across all nations.

When citizens were asked to score ten aspects of their recycling services out of ten, feedback to residents score was five or below in all nations. Scores for each nation in 2025 were: England (4.7), Northern Ireland (5), Scotland (4.2), Wales (4.9) and Ireland (5). These scores have remained broadly consistent with citizens since 2021.

Methodology

In June 2025, INCPEN commissioned Icaro, a market and social research agency, to gather data from UK and Irish citizens across four key areas: climate and the environment, deposit return schemes, confidence in recycling, and their household recycling services. Surveys were delivered online, with responses representative of and weighted according to UK & Irish population sizes.

A summary of the number of surveys carried out is shown below:

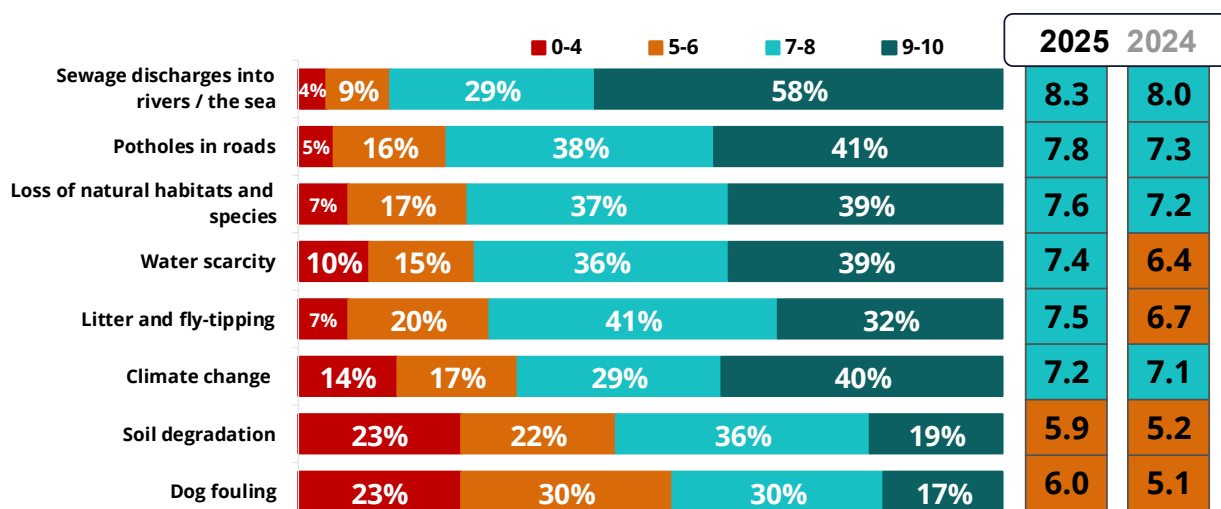
	2 nd to 13 th June 2025
United Kingdom	4,510 respondents
England	1,764
N Ireland	744
Scotland	1,001
Wales	1,001
Ireland	1,007 respondents

Climate & environment

The rationale for gathering citizens' insights into climate and environmental issues is to understand the actions citizens wish to see from governments, as well as the changes they are willing to make to support climate and environmental initiatives.

Priorities for Government: UK

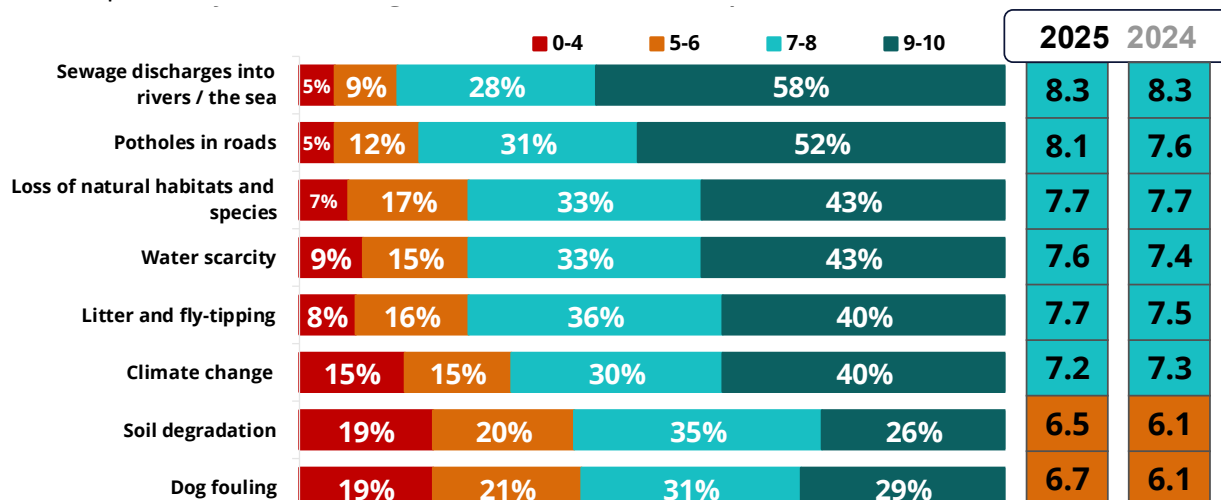
Citizens were provided with a list of potential issues for the government and asked to score them in terms of priority (0 = this should not be a priority for the government at all, to 10 = this should be a top priority for the government). The bar chart below reflects UK citizens' views.



Base: 4,510 UK adults. June 2025

Priorities for Government: Ireland

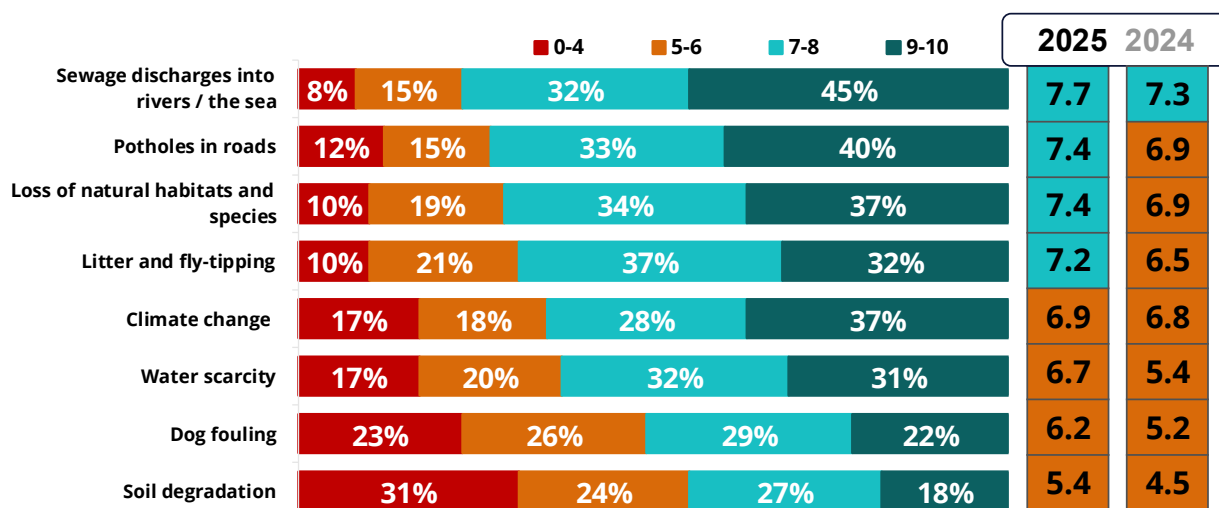
The same question was asked of Irish citizens. The bar chart below reflects their views: -



Base: 1,007 adults in Ireland. June 2025

Issues of personal importance: UK

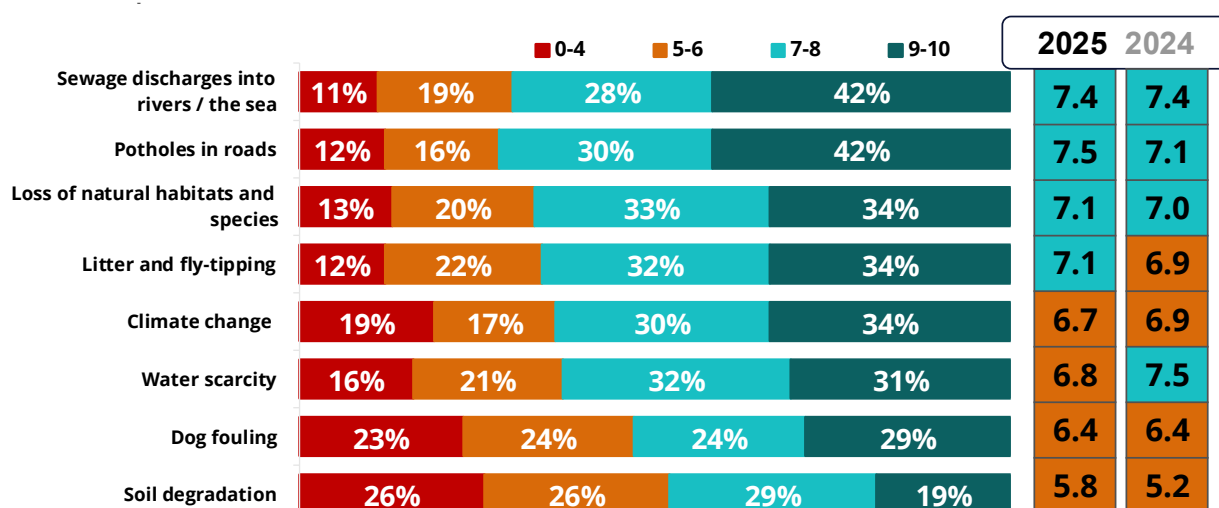
Citizens were asked to what extent the listed issues were important to them personally. A similar scale was used, where 0 = not an important issue, and 10 = an extremely important issue. The bar chart below reflects UK citizens' views:



Base: 4,510 UK adults. June 2025

Issues of personal importance: Ireland

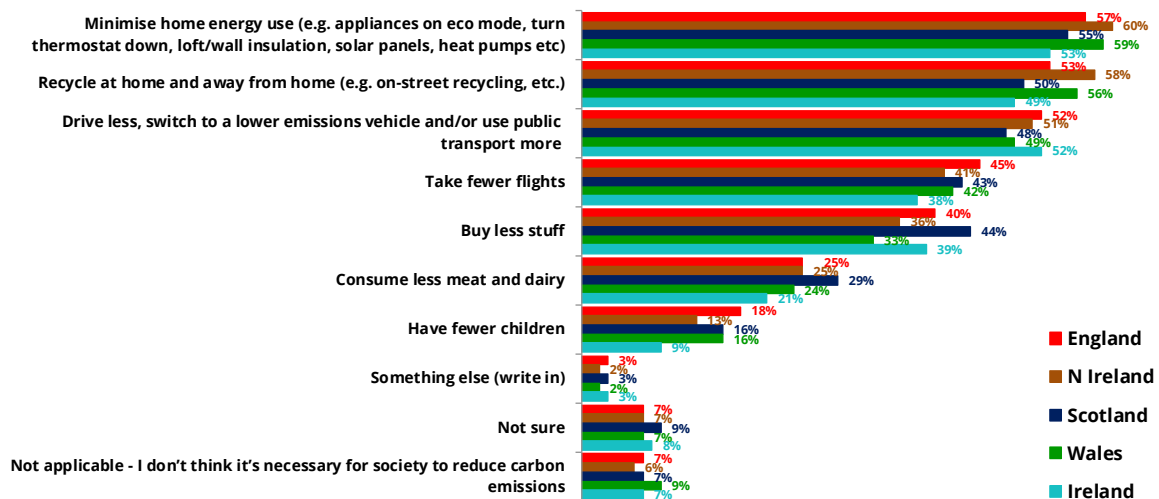
The same question was asked of Irish citizens. The bar chart below reflects their views:



Base: 1,007 adults in Ireland. June 2025

Attitudes towards the most effective ways to reduce carbon emissions

Citizens were asked for their views on what they considered the most effective ways to reduce carbon emissions. Each citizen could select up to five responses. The bar chart below reflects results for each nation.

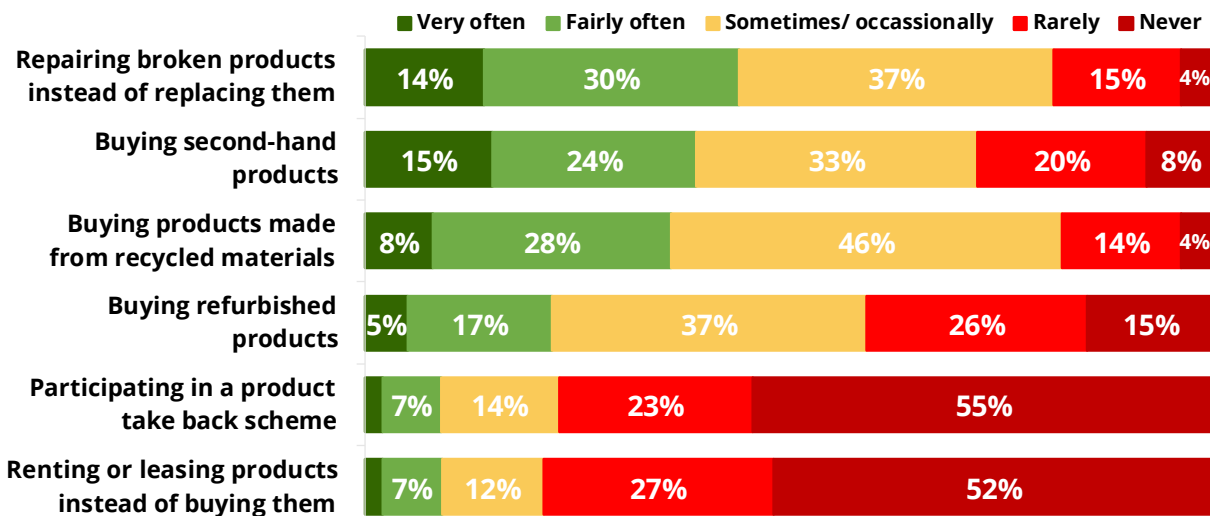


Base: 4,510 UK adults & 1,007 adults in Ireland. June 2025

(UK = 1,764 adults in England, 744 adults in N Ireland, 1,001 adults in Scotland 1,001 adults in Wales weighted in line with the UK population)

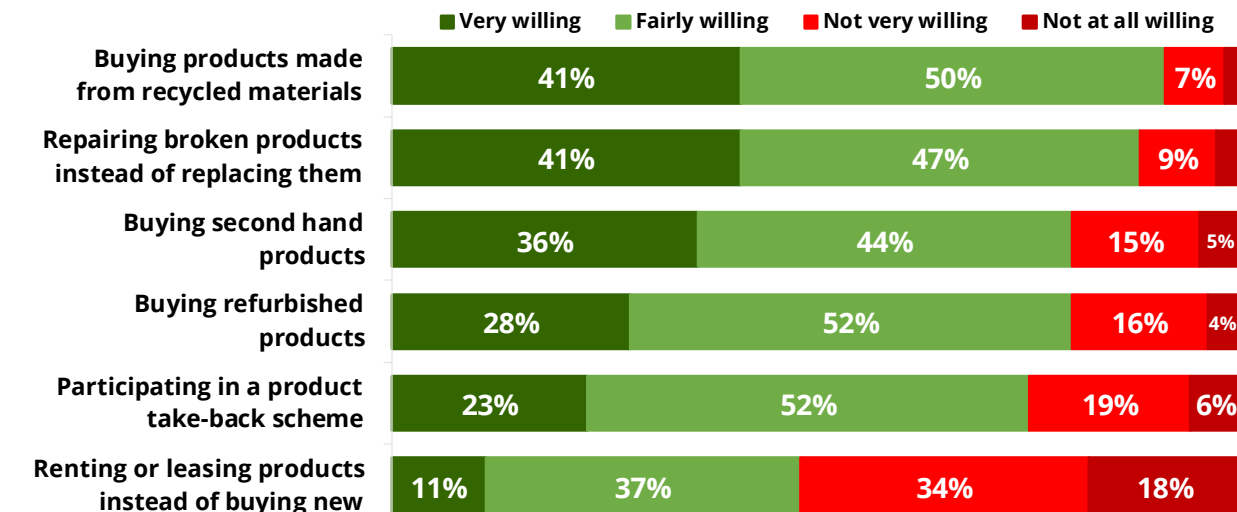
Circular economy behaviours: current engagement and willingness to engage further

Citizens were asked how often they currently engage in a range of circular economy behaviours. The table below reflects the results for the UK.



Base: 4,510 UK adults. June 2025

Citizens were then asked how willing they would be to engage in a range of circular economy behaviours. Again, the table below reflects the results for the UK.



Base: 4,510 UK adults. June 2025

Summary: Climate, Environment and Circular Economy Behaviours

Citizens in the UK consider sewage discharges into rivers and the sea the top environmental priority for the government, reflecting the issue they consider most important personally. Other key environmental priorities for the government include potholes in roads (7.8), loss of natural habitats and species (7.6), and climate change (7.2). Compared to last year, most environmental priorities for the government have increased, although climate change has broadly remained the same (7.2 for 2025 and 7.1 for 2024).

Citizens in Ireland also consider sewage discharges into rivers and the sea a top environmental priority for their government, while potholes on roads are the issue they view as most important to them personally. Other environmental priorities for the Irish Government highlight: loss of natural habitats and species (7.7), and climate change (7.2). Compared to last year, environmental priorities for the Irish Government have generally increased, though climate change has broadly stayed the same (7.2 for 2025 & 7.3 in 2024).

Citizens believe that minimising home energy use and recycling are the most effective ways for society to reduce carbon emissions. Broadly across all nations, citizens selected these options as the most effective, compared to driving less, taking fewer flights, buying less, consuming less meat and dairy, and having fewer children. This is consistent with last year's results.

UK citizens' willingness to adopt circular economy behaviours (at least in principle) continues to far exceed their current actions. Strong majorities of UK citizens say they would be willing to buy products with recycled content (91%), send products for repair (88%), buy second hand (80%), and buy refurbished (80%). The exception is renting or leasing, with just under half (49%) open to this.

Deposit return scheme (DRS)

The rationale for gathering citizens' insights on DRS are:

1. To identify knowledge benchmarks that could be useful to the UK DRS upon its launch, particularly for the DRS Deposit Management Organisation (DMO), the four UK governments, and the wider industry.
2. To assess potential areas for further progress in Ireland, especially in light of the recent introduction of the Re-Turn DRS in February 2024.

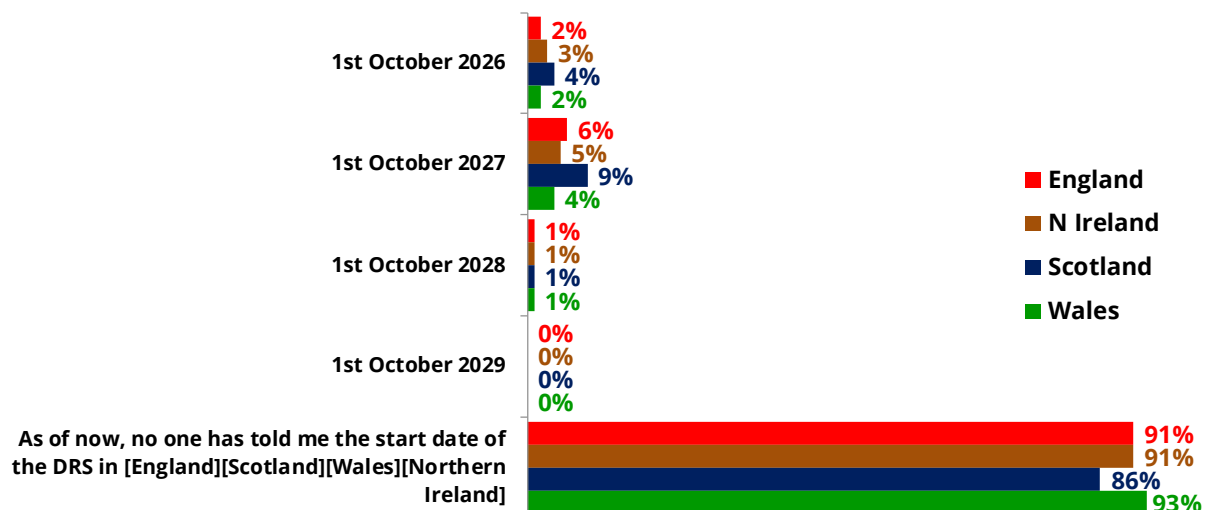
Prior to answering questions on DRS, citizens were provided with supplementary information about the scheme relevant to their nation. UK citizens were informed that all four UK governments (England, Northern Ireland, Scotland and Wales) had announced the introduction of a new DRS. It was explained that the scheme would require citizens to pay a deposit on many beverage containers, which would be refunded when the empty packaging was returned, typically to a retailer. Irish citizens were informed that on 1st February 2024, Ireland had introduced 'Re-turn,' the national DRS for beverage packaging.

Citizens were asked to respond to questions regarding the DRS start date (UK only), the DRS deposit amount, the materials covered by the scheme and the designated DRS return points.

DRS Start Date (UK only)

UK citizens were asked when, in their view, the DRS was expected to start in their nation.

The bar chart below reflects results for each nation.



Base: 4,510 UK adults. June 2025

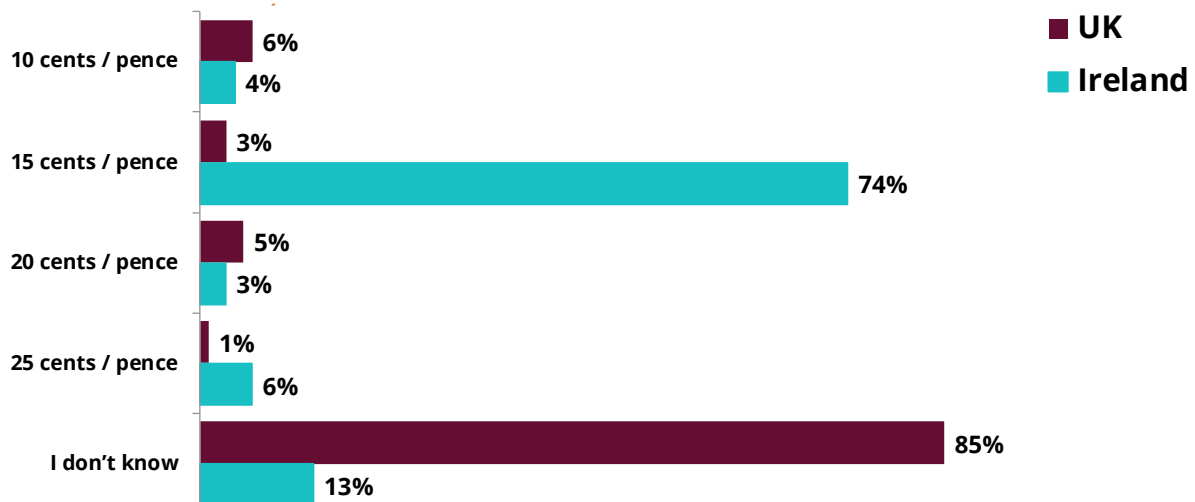
(UK = 1,764 adults in England, 744 adults in N Ireland, 1,001 adults in Scotland 1,001 adults in Wales weighted in line with the UK population)

The majority of UK citizens reported that they had not yet been informed of the DRS start date in their respective nation, with responses ranging from 86% to 93%.

DRS Deposit Amount

Citizens were asked whether they knew the deposit amount for a single beverage container (e.g. 330ml/500ml).

The bar chart below reflects results for the UK and Ireland.

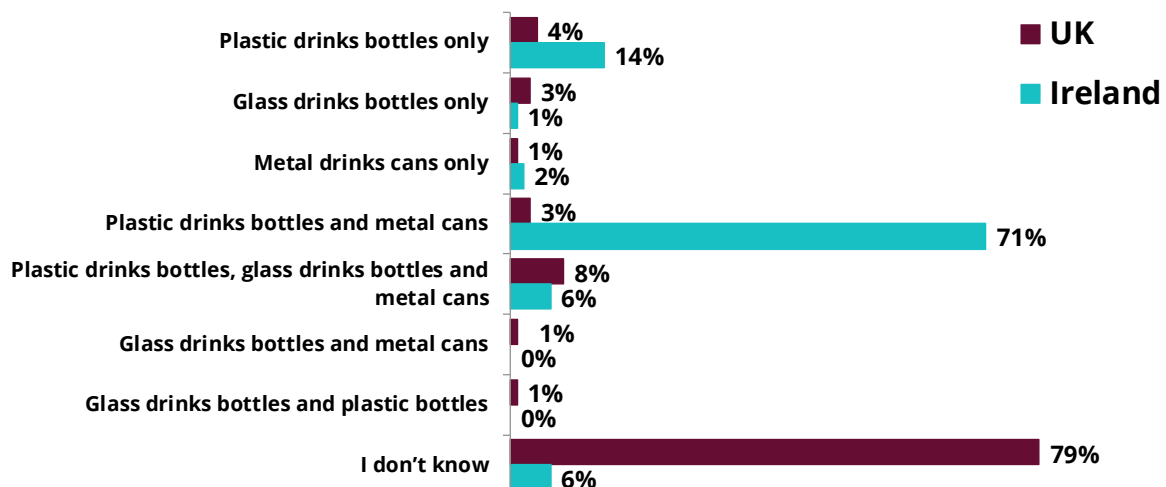


Base: 4,510 UK adults & 1,007 adults in Ireland. June 2025

DRS In-Scope Materials

Citizens were asked which beverage packaging materials were included in the DRS in their respective nation.

The bar chart below reflects results for the UK and Ireland.

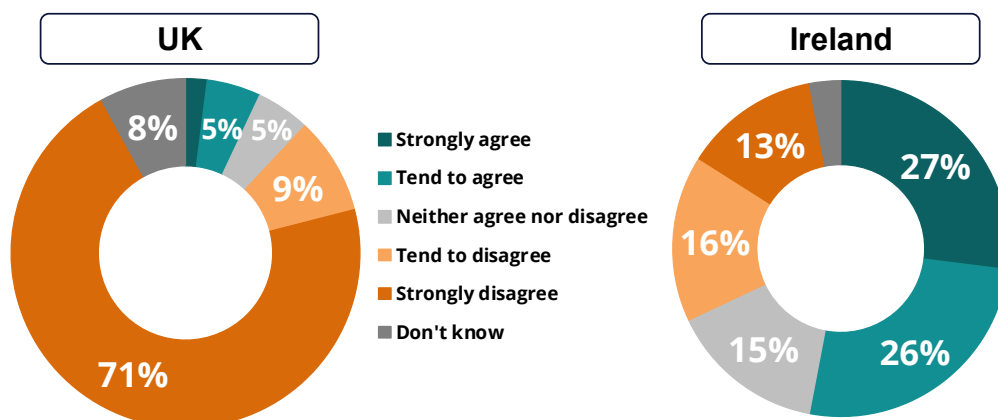


Base: 4,510 UK adults & 1,007 adults in Ireland. June 2025

DRS Return Points

Citizens were also asked whether they believed they had received clear information about the locations where they could return empty DRS beverage containers and reclaim their deposit.

The pie charts below reflect results for the UK and Ireland.



Base: 4,510 UK adults & 1,007 adults in Ireland. June 2025

Summary: Deposit return scheme (DRS)

As expected, because public awareness campaigning is due to take place in 2027, currently citizens in the UK have low knowledge and awareness of DRS. Most UK citizens are unaware of their nation's DRS start date, do not know the deposit amount (85%), do not know the in-scope materials (79%), nor feel they have received clear information about the places where they could return their empty DRS packaging (80%). This is consistent with UK citizens' views in 2024. Awareness and understanding of DRS are likely to increase year on year as the 1 October 2027 launch approaches, particularly as the UK Deposit Management Organisation (UK DMO) becomes more operational in the coming years.

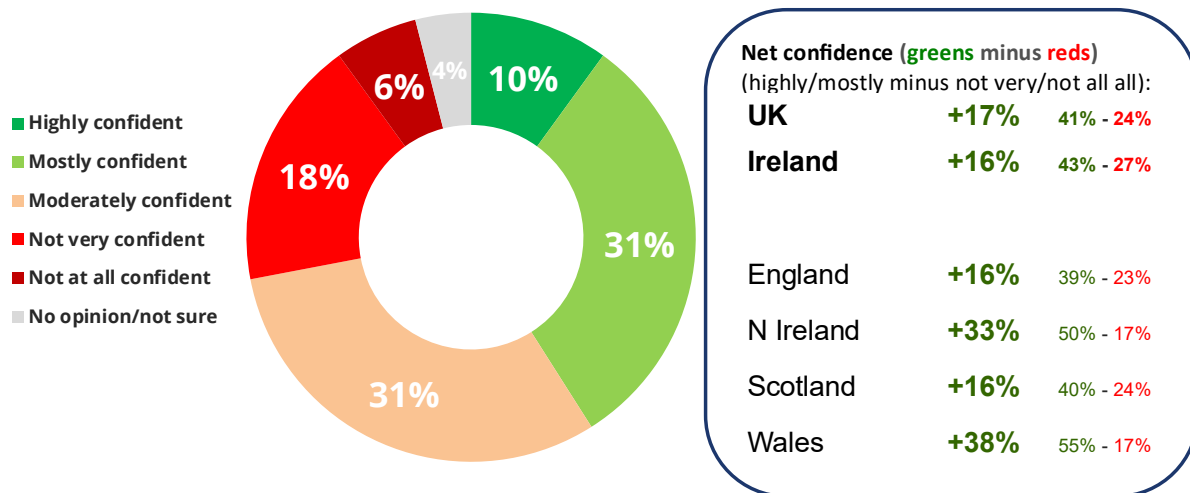
Citizens in Ireland continue to have good knowledge and awareness of DRS. The majority of Irish citizens know the deposit level for a single beverage item is 15 cents (74%), are aware that plastic drinks bottles and metal cans are the in-scope materials (71%) and agree they have received clear information about where to return their empty DRS packaging (53%). This is broadly similar to Irish citizens' views in 2024. While this represents good knowledge and awareness across Ireland, there is still room for improvement - particularly as 29% of Irish citizens either tend to disagree or strongly disagree when asked whether they had received clear information about where to return their empty DRS packaging.

Public confidence in recycling

The rationale for gathering citizens' insights into public confidence in recycling is threefold:

1. To understand how confident citizens are that recyclates collected from homes or on-street bins are actually recycled.
2. To identify factors that positively or negatively influence citizens' confidence.
3. To inform the development of national and local communications activities, including analysing the linkages between recycling services, communications to citizens, confidence, subsequent behaviours, and ultimately impacts on recycling rates.

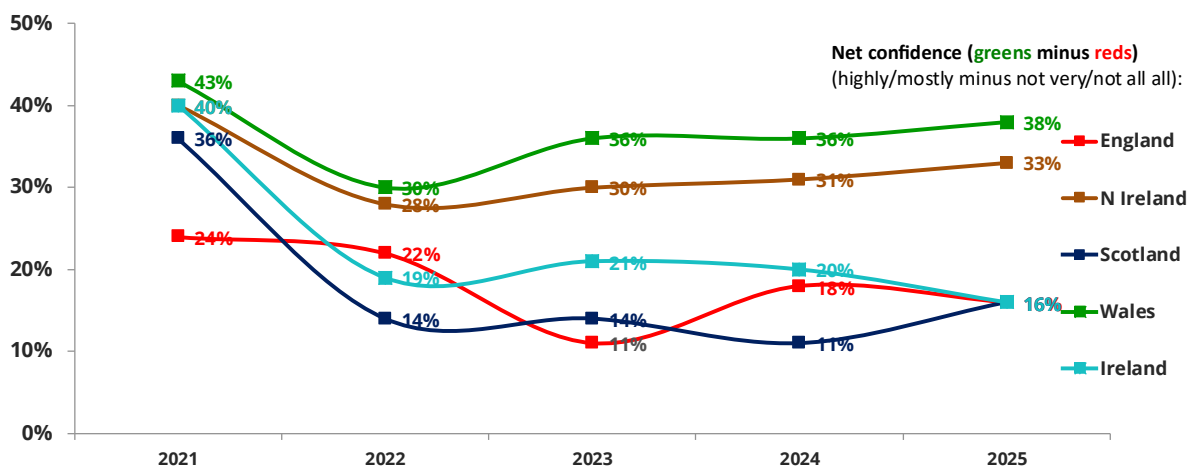
Citizens were asked how confident they were that recycling collected from their home was actually recycled. The pie chart below reflects the results for UK citizens.



Base: 4,483 UK adults & 995 adults in Ireland who recycle from home. June 2025

(UK = 1,751 adults in England, 740 adults in N Ireland, 993 adults in Scotland 999 adults in Wales weighted in line with the UK population)

The graph below shows net confidence percentages over time. Net confidence is consistently higher in Wales and Northern Ireland, and broadly comparable across Ireland, England, and Scotland.

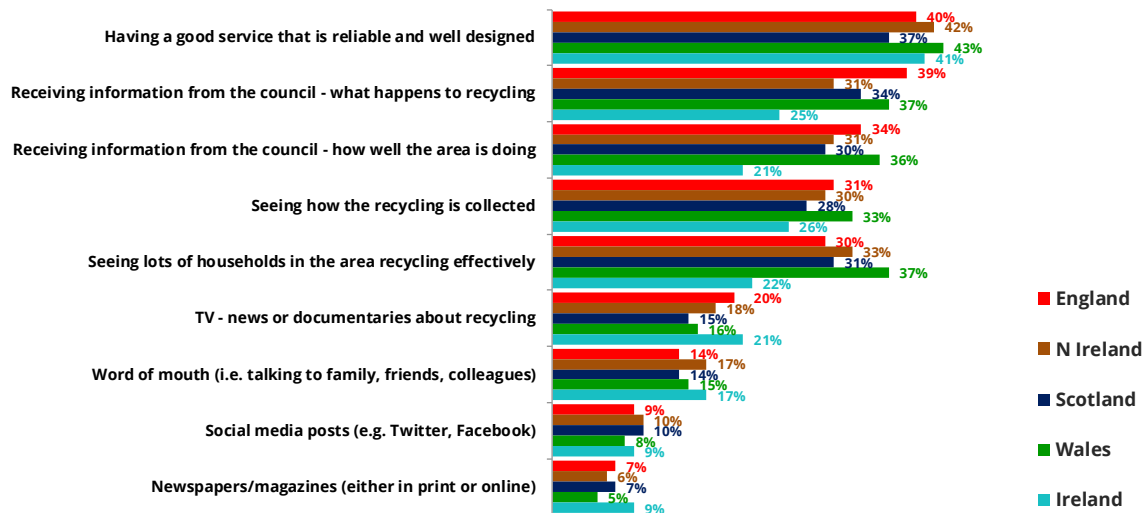


Base: 4,483 UK adults & 995 adults in Ireland who recycle from home. June 2025

(UK = 1,751 adults in England, 740 adults in N Ireland, 993 adults in Scotland 999 adults in Wales weighted in line with the UK population)

Positive influences on citizens' confidence

Citizens were asked which factors positively influence their confidence in recycling from home. The graph below presents their responses on a nation-by-nation basis.

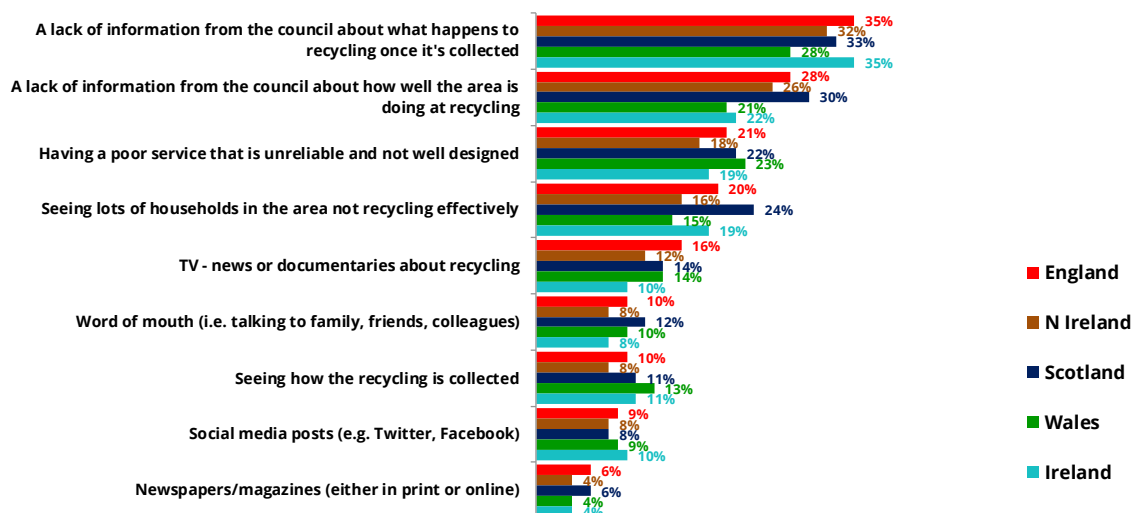


Base: 4,483 UK adults & 995 adults in Ireland who recycle from home. June 2025

(UK = 1,751 adults in England, 740 adults in N Ireland, 993 adults in Scotland 999 adults in Wales weighted in line with the UK population)

Negative influences on citizens' confidence

Citizens were asked which factors negatively influence their confidence in recycling from home. The graph below presents their responses on a nation-by-nation basis.



Base: 4,483 UK adults & 995 adults in Ireland who recycle from home. June 2025

(UK = 1,751 adults in England, 740 adults in N Ireland, 993 adults in Scotland 999 adults in Wales weighted in line with the UK population)

The most frequently cited factor across all nations is *a lack of information from the council about what happens to recycling once it is collected*. This has consistently been the top response to this question in all nations annually since 2021.

Summary: Public confidence in recycling

There is a divergence in citizens' confidence in recycling, with significantly higher confidence in Wales and Northern Ireland, compared to England, Scotland and Ireland. Net confidence scores for each nation in 2025 were: England (16%), Northern Ireland (33%), Scotland (16%), Wales (38%), and Ireland (16%). Net confidence scores have decreased in all nations since 2021, with the largest reductions observed in England, Scotland and Ireland.

Across all nations, the factor that most positively influences citizens' confidence in recycling is having a good service that is reliable and well designed. Scores for each nation in 2025 were: England (40%), Northern Ireland (42%), Scotland (37%), Wales (43%), and Ireland (41%). Other factors that scored highly across nations included receiving information from councils on what happens to recycling and information on how well the local area is performing. These factors have consistently been the highest rated by citizens since 2021.

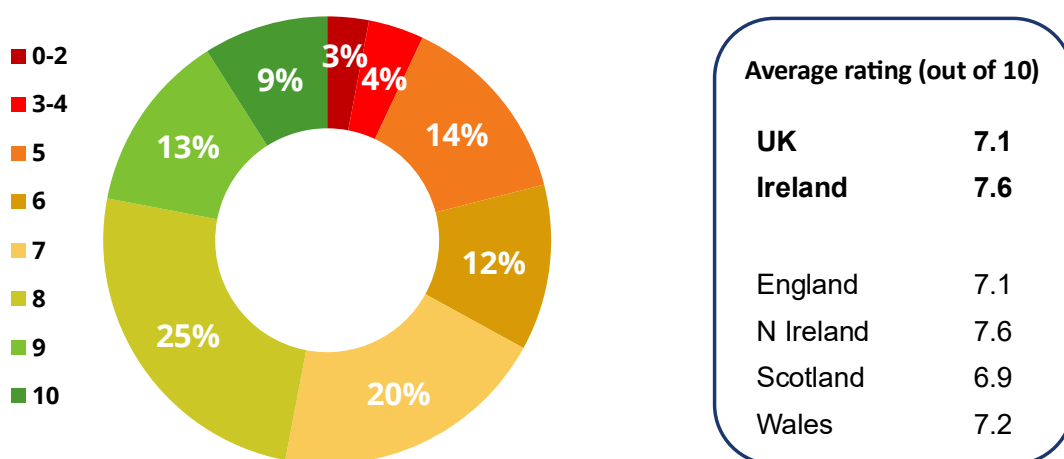
Across all nations, the factor that most negatively influences citizens' confidence in recycling is a lack of information about what happens to recycling once it is collected. Scores for each nation in 2025 were: England (35%), Northern Ireland (32%), Scotland (33%), Wales (28%), and Ireland (35%). Having a lack of information has consistently been the top score with citizens since 2021.

Household recycling services

The rationale for gathering citizens' insights into household recycling services is threefold:

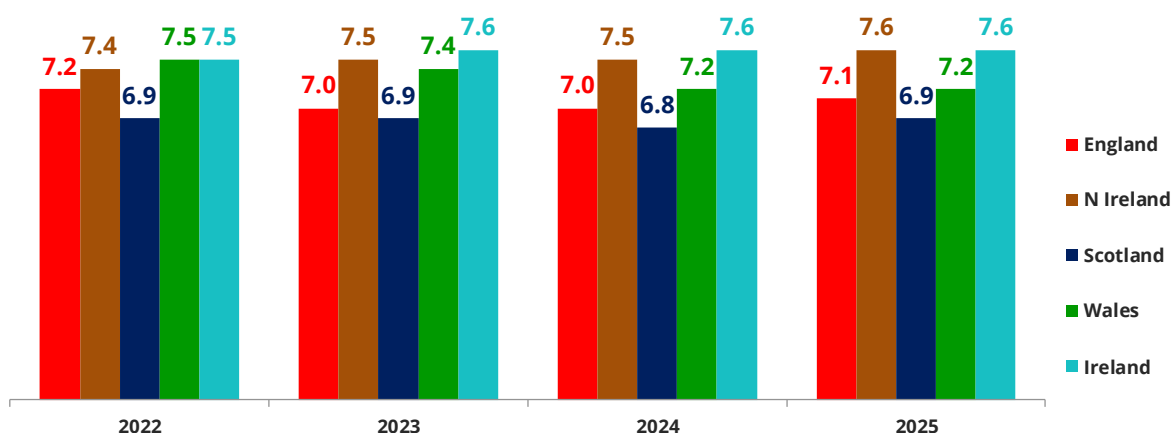
1. To understand how citizens rate the quality of their recycling services.
2. To gain a deeper understanding of what constitutes a good, reliable, and well-designed recycling service.
3. To support the development of national and local initiatives aimed at improving recycling services through collaborative efforts across the packaging value chain.

Citizens were asked to rate the overall quality of their household recycling services. The pie chart below presents the results for the UK, alongside average ratings across all nations.



Base: 4,357 UK adults & 975 adults in Ireland who give a score on their service (excluding 'don't know' responses). June 2025
(UK = 1,680 adults in England, 724 adults in N Ireland, 965 adults in Scotland 988 adults in Wales weighted in line with the UK population)

The bar chart below shows the average ratings for all nations over time, allowing comparison of citizens' responses across previous years.

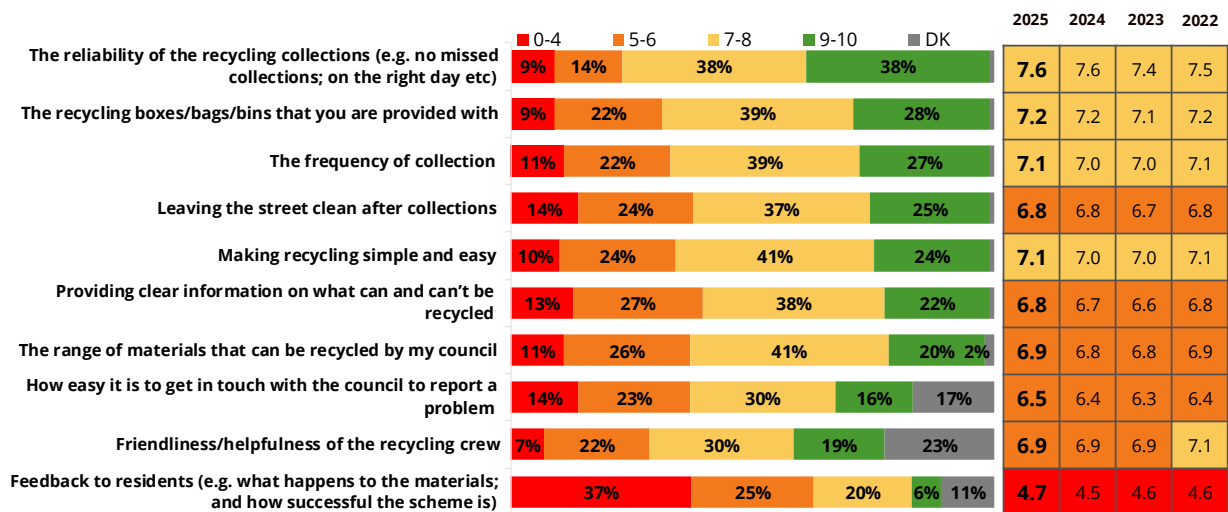


Base: 4,357 UK adults & 975 adults in Ireland who give a score on their service (excluding 'don't know' responses). June 2025
(UK = 1,680 adults in England, 724 adults in N Ireland, 965 adults in Scotland 988 adults in Wales weighted in line with the UK population)

Citizens were asked what they believe constituted an excellent recycling service and were provided with a list of ten aspects to score individually. Each aspect was rated on a scale from 0 to 10, where 0 represented *extremely poor*, 5 represented *average*, and 10 represented excellent.

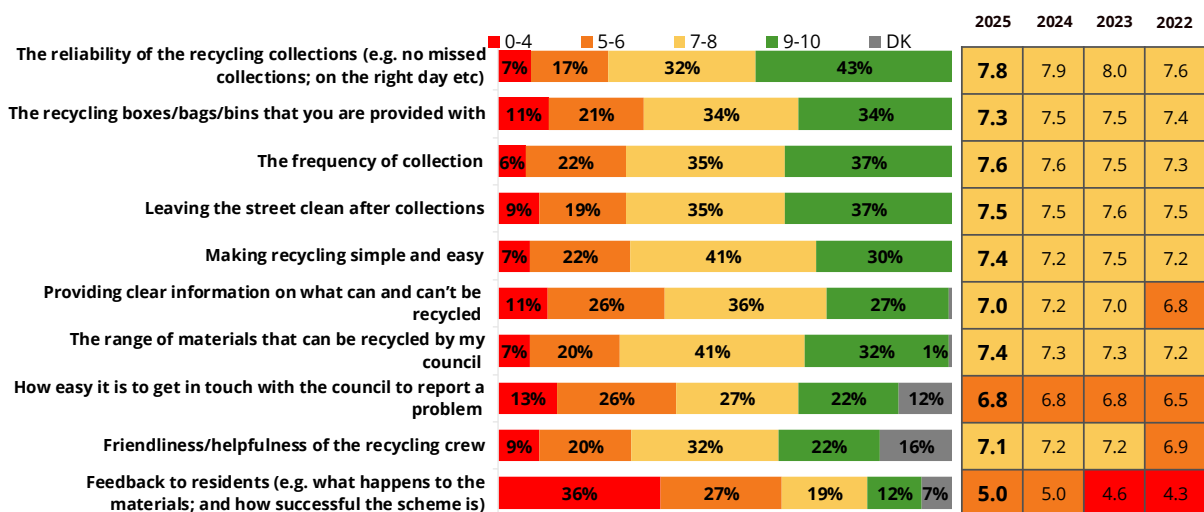
The tables below present a nation-by-nation breakdown of citizens' ratings for these ten aspects. To the right of each table, the average rating scores for 2025 are shown alongside the corresponding averages from previous years for comparison.

England



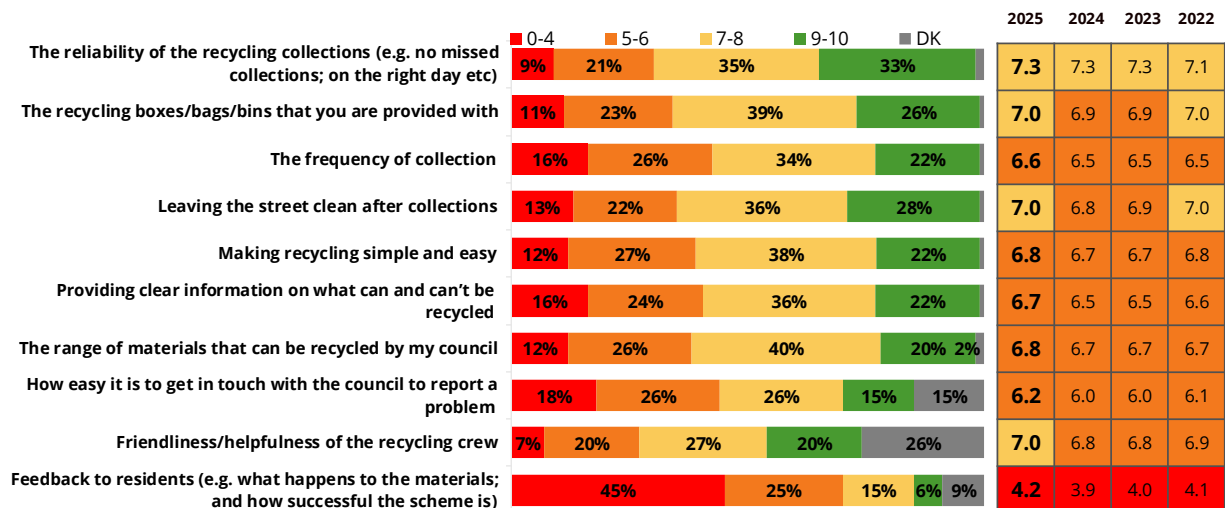
Base: 1,680 adults in England who give a score on their service. June 2025

Northern Ireland



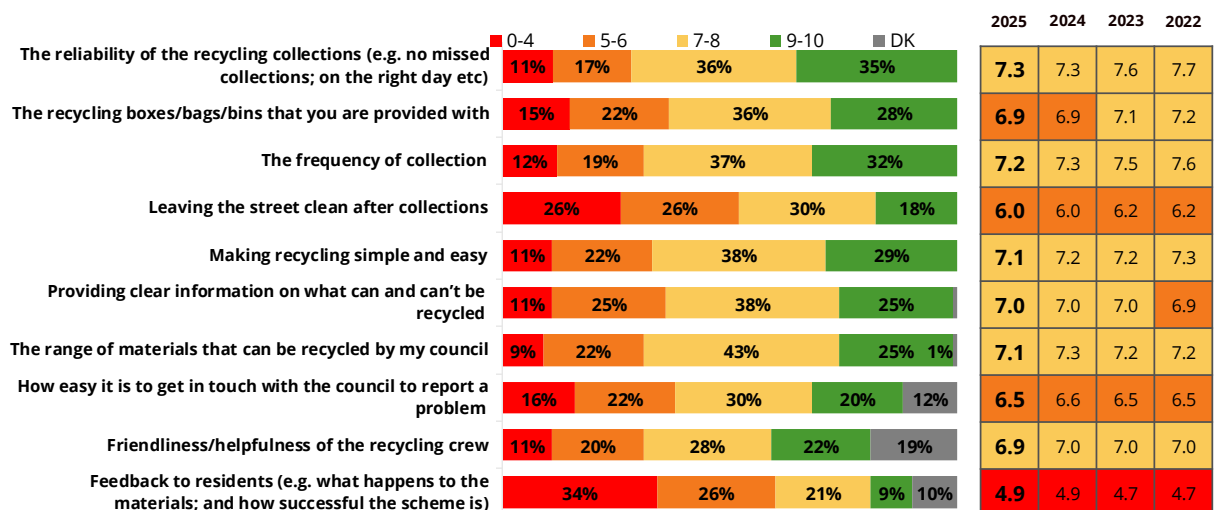
Base: 724 adults in N Ireland who give a score on their service. June 2025

Scotland



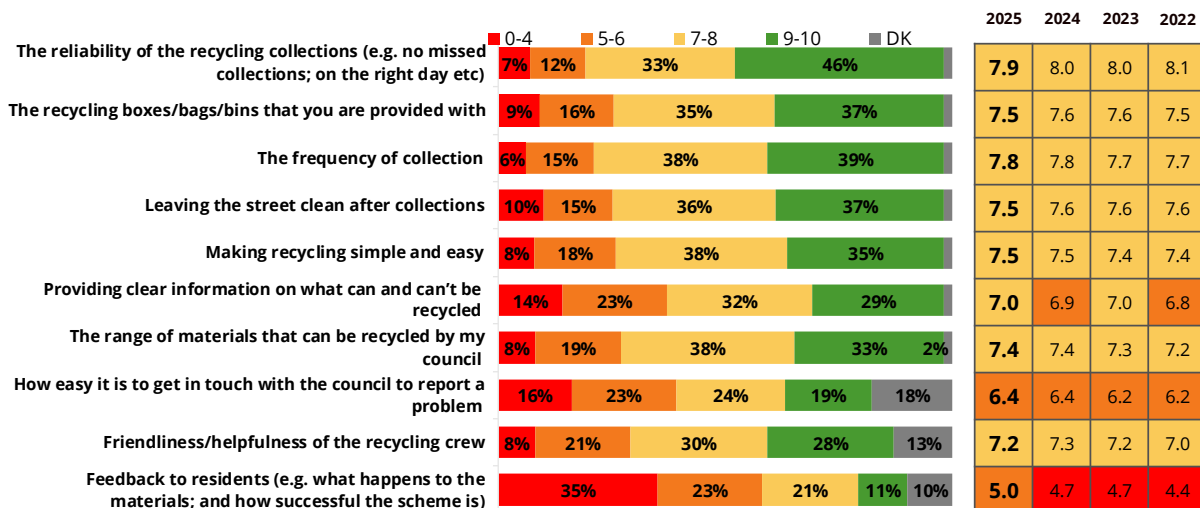
Base: 965 adults in Scotland who give a score on their service. June 2025

Wales



Base: 988 adults in Wales who give a score on their service. June 2025

Ireland



Base: 975 adults in Ireland who give a score on their service. June 2025

Summary: Household recycling services

The overall quality of recycling collection services across all nations scores above average. All nations do have the opportunity to improve their average scores to achieve an 'excellent' rating. Overall recycling scores for each nation in 2025 were: England (7.1), Northern Ireland (7.6), Scotland (6.9), Wales (7.2), and Ireland (7.6). These scores have remained broadly consistent with citizens since 2021.

Providing citizens with feedback (e.g. what happens to the materials and how successful the scheme is) continues to represent an area for improvement with citizens across all nations. When citizens were asked to score ten aspects of their recycling services out of ten, feedback to residents score was five or below in all nations. Scores for each nation in 2025 were: England (4.7), Northern Ireland (5), Scotland (4.2), Wales (4.9) and Ireland (5). These scores have remained broadly consistent with citizens since 2021.

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