



**National Survey  
Conducted February 22 – 28, 2023**

**SURVEY FINDINGS**

**Overview:**

A recent survey conducted by RG Strategies of 1200 Americans indicates that a large majority of Americans support advanced recycling and agree that advanced recycling should be considered recycling at an almost identical rate as with mechanical recycling.

Americans also believe that if different labeling requirements are set for different recycling methods, it could lead to confusion and ultimately cause people to recycle less often.

Survey participants believe that it is appropriate for items that can be recycled using advanced recycling to be labeled “recyclable,” identical results to when participants are asked the same question about labeling for mechanical recycling. Furthermore, participants believe that it is appropriate to label new plastics produced with advanced recycling to be labeled as containing “recycled content.” Again, this result is almost identical to how participants respond to being asked about labeling for mechanical recycling.

**Survey Findings:**

**62% of Americans believe that single use plastics are important to quality of life.**

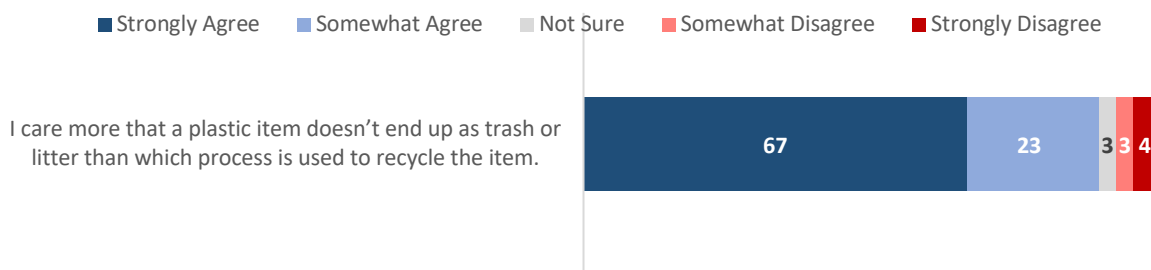
31% of Americans say that single use plastics are very important to our quality of life, with another 31% who say that they are somewhat important. Only 36% of Americans say that single-use plastics are only slightly important or not at all important.

**SURVEY QUESTION: The term “single-use plastics” includes items like grocery bags, water bottles, and food service items like take-out containers or utensils. It also includes items like produce packaging, diapers, and medical products such as syringes, IV fluid bags, gloves, masks, and sterile packaging. How important are single-use plastics to our quality of life? Are they very important, somewhat important, only slightly important, or not at all important?**

|                         | All Participants |
|-------------------------|------------------|
| Very important          | 31%              |
| Somewhat important      | 31               |
| Only slightly important | 24               |
| Not at all important    | 12               |
| Not sure                | 2                |
| <b>IMPORTANT</b>        | <b>62</b>        |
| <b>NOT IMPORTANT</b>    | <b>36</b>        |

**90% of Americans agree that they care more that a plastic item doesn’t end up in the trash or litter than which process is used to recycle the item.**

Two-thirds of participants (67%) say they strongly agree and another 23% say they somewhat agree with the statement: I care more that a plastic item doesn’t end up in the trash or litter than which process is used to recycle the item. Only 7% disagree with the statement. This strong agreement is consistent across all demographic subgroups.

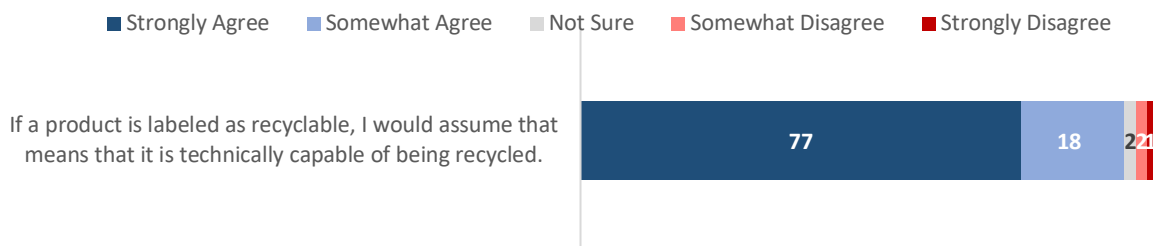


I care more that a plastic item doesn't end up in the trash or litter than which process is used to recycle the item.  
 By gender, age, ethnicity, geographic region, and education

|                           | Agree     | Disagree | Not Sure |
|---------------------------|-----------|----------|----------|
| <b>TOTAL</b>              | <b>90</b> | <b>7</b> | <b>3</b> |
| Female                    | 91        | 6        | 3        |
| Male                      | 88        | 9        | 3        |
| Gen Z/Millennials (18-39) | 86        | 8        | 6        |
| Gen X (40-55)             | 89        | 8        | 2        |
| Boomers (56-66)           | 88        | 8        | 4        |
| Silent (67+)              | 92        | 5        | 3        |
| White                     | 91        | 6        | 4        |
| Latino                    | 86        | 11       | 3        |
| Asian                     | 94        | 6        | 0        |
| Black                     | 88        | 8        | 4        |
| Mixed/Other               | 80        | 15       | 5        |
| Northeast                 | 91        | 8        | 2        |
| Midwest                   | 92        | 7        | 1        |
| South                     | 94        | 5        | 2        |
| Mountain/Plains           | 88        | 7        | 5        |
| Pacific                   | 88        | 7        | 4        |
| Not college graduate      | 86        | 10       | 4        |
| College graduate          | 90        | 7        | 3        |

**95% of Americans agree with the statement: If a product is labeled as recyclable, I would assume that means that it is technically capable of being recycled.**

77% of participants strongly agree and another 18% somewhat agree with the statement, while only 3% disagree with the statement.



**More than 9 in 10 Americans see both advanced recycling and mechanical recycling as examples of recycling.**

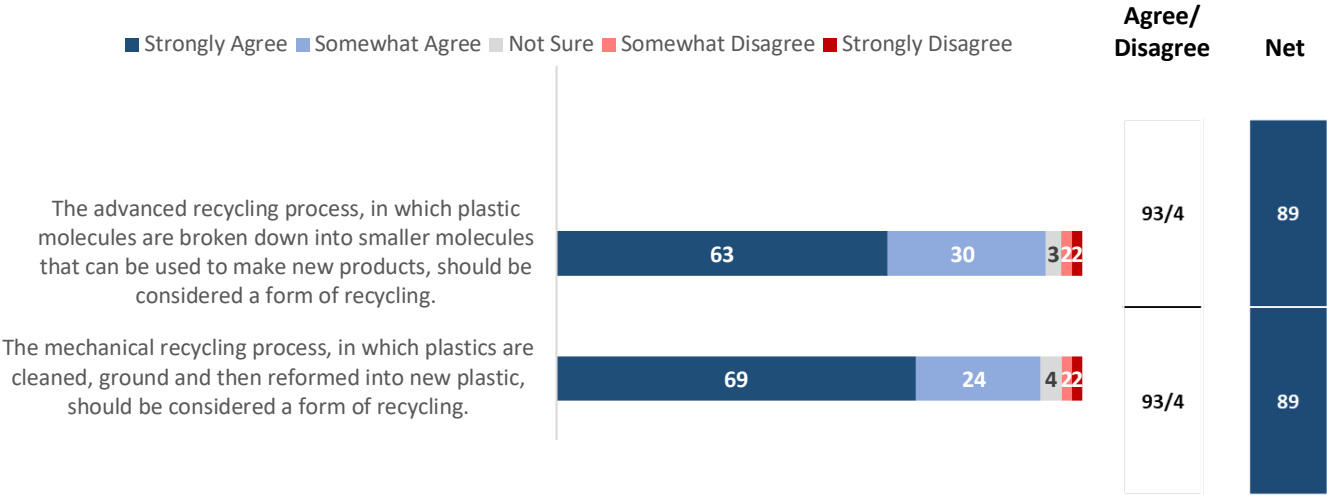
While 93% of Americans believe that mechanical recycling is an example of recycling, 91% believe that advanced recycling is an example of recycling.

**SURVEY QUESTIONS: (MECHANICAL) In [one/another] method used to address waste, used plastics can be separated from other waste and cleaned, ground, and then reformed to make new products. (ADVANCED) In [one/another] method used to address waste, used plastics can be broken down into smaller molecules that can be used to make new products, including new plastics. There is no burning of plastics involved in these processes. Do you believe this is an example of recycling or not?**

|                          | Mechanical Recycling | Advanced Recycling |
|--------------------------|----------------------|--------------------|
| Yes, this is recycling   | 93%                  | 91%                |
| No, this isn't recycling | 4                    | 5                  |
| Not sure                 | 3                    | 5                  |

**More than 9 in 10 Americans say both advanced recycling and mechanical recycling should be considered forms of recycling.**

93% of Americans believe that mechanical recycling is an example of recycling, 93% believe that advanced recycling is an example of recycling.



**Americans support advanced recycling and mechanical recycling at similarly high levels.**

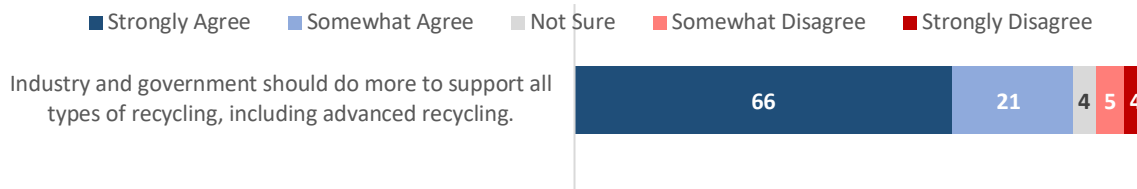
While 89% of Americans support mechanical recycling, 89% support advanced recycling. Further, advanced recycling actually receives more strong support from survey participants, with 65% strongly supporting advanced recycling, compared to 58% of participants strongly supporting mechanical recycling.

**SURVEY QUESTION: Do you support or oppose this option for recycling plastics?**

|                      | Mechanical Recycling | Advanced Recycling |
|----------------------|----------------------|--------------------|
| Strongly support     | 58%                  | 65%                |
| Somewhat support     | 31                   | 24                 |
| Somewhat oppose      | 2                    | 3                  |
| Strongly oppose      | 2                    | 2                  |
| Not sure             | 7                    | 6                  |
| <b>TOTAL SUPPORT</b> | <b>89</b>            | <b>89</b>          |
| <b>TOTAL OPPOSE</b>  | <b>4</b>             | <b>5</b>           |

**87% of Americans agree with the statement: Industry and government should do more to support all types of recycling, including advanced recycling.**

66% of participants strongly agree and another 21% somewhat agree with the statement, while 9% disagree with the statement.



**Americans believe that it’s appropriate to have a label stating that items that can be recycled using advanced recycling are recyclable.**

91% of Americans say that it is appropriate (64% definitely and 27% probably) to label items that can be recycled using mechanical recycling as “recyclable,” and 91% say that it is appropriate (65% definitely and 26% probably) to label items that can be recycled using advanced recycling as “recyclable.”

**SURVEY QUESTION: If a plastic item could be processed in this way (Mechanical/Advanced) after use, do you believe it would be appropriate to have a label or logo stating it is “recyclable”?**

|                  | Mechanical Recycling | Advanced Recycling |
|------------------|----------------------|--------------------|
| Yes, definitely  | 64%                  | 65%                |
| Yes, probably    | 27                   | 26                 |
| No, probably     | 3                    | 3                  |
| No, definitely   | 2                    | 2                  |
| Not sure         | 4                    | 5                  |
| <b>TOTAL YES</b> | <b>91</b>            | <b>91</b>          |
| <b>TOTAL NO</b>  | <b>5</b>             | <b>5</b>           |

Across all demographic groups, Americans believe that it's appropriate to have a label stating that plastic items that can be processed via advanced recycling are recyclable.

**SURVEY QUESTION: If a plastic item could be processed in this way (Mechanical/Advanced) after use, do you believe it would be appropriate to have a label or logo stating it is "recyclable"?**  
**By gender, age, ethnicity, geographic region, and education**

|                           | Mechanical Recycling: Yes | Advanced Recycling: Yes |
|---------------------------|---------------------------|-------------------------|
| <b>TOTAL</b>              | <b>91</b>                 | <b>91</b>               |
| Female                    | 92                        | 92                      |
| Male                      | 90                        | 88                      |
| Gen Z/Millennials (18-39) | 89                        | 88                      |
| Gen X (40-55)             | 92                        | 90                      |
| Boomers (56-66)           | 89                        | 89                      |
| Silent (67+)              | 89                        | 92                      |
| White                     | 91                        | 90                      |
| Latino                    | 89                        | 88                      |
| Asian                     | 95                        | 95                      |
| Black                     | 96                        | 96                      |
| Mixed/Other               | 87                        | 87                      |
| Northeast                 | 93                        | 86                      |
| Midwest                   | 94                        | 91                      |
| South                     | 90                        | 91                      |
| Mountain/Plains           | 91                        | 91                      |
| Pacific                   | 92                        | 90                      |
| Not college graduate      | 89                        | 88                      |
| College graduate          | 91                        | 92                      |

Americans believe that it's appropriate to have a label saying that an item processed from advanced recycling can be labeled as "recycled content."

89% of Americans say that it is appropriate (63% definitely and 26% probably) to label items processed from mechanical recycling as "recycled content," and 89% say that it is appropriate (63% definitely and 26% probably) to label items processed from advanced recycling as "recycled content."

**SURVEY QUESTION: If a new plastic item was made from plastics that were processed in this way (Mechanical/Advanced), do you believe it would be appropriate to have a label saying it contained "recycled content"?**

|                  | Mechanical Recycling | Advanced Recycling |
|------------------|----------------------|--------------------|
| Yes, definitely  | 63%                  | 63%                |
| Yes, probably    | 26                   | 26                 |
| No, probably     | 4                    | 4                  |
| No, definitely   | 3                    | 3                  |
| Not sure         | 4                    | 5                  |
| <b>TOTAL YES</b> | <b>89</b>            | <b>89</b>          |
| <b>TOTAL NO</b>  | <b>7</b>             | <b>6</b>           |

**Americans agree that if product can be recycled, then it is appropriate to label that item as recyclable, even if access to recycling facilities varies across the country.**

82% of survey participants strongly or somewhat agree that it is appropriate to label an item as recyclable if a product can be recycled, even if access to recycling facilities across the country vary. Only 12% of survey participants disagree. This is true across all demographic groups.

**If a product can be recycled, then it is appropriate to label that item as recyclable, even if access to recycling facilities varies across the country.**

**By gender, age, ethnicity, geographic region, and education**

|                           | <b>Agree</b> | <b>Disagree</b> | <b>Not Sure</b> |
|---------------------------|--------------|-----------------|-----------------|
| <b>TOTAL</b>              | <b>82</b>    | <b>12</b>       | <b>5</b>        |
| Female                    | 82           | 13              | 5               |
| Male                      | 83           | 12              | 5               |
| Gen Z/Millennials (18-39) | 78           | 18              | 3               |
| Gen X (40-55)             | 81           | 13              | 6               |
| Boomers (56-66)           | 83           | 11              | 5               |
| Silent (67+)              | 86           | 10              | 4               |
| White                     | 81           | 13              | 5               |
| Latino                    | 83           | 13              | 3               |
| Asian                     | 89           | 9               | 2               |
| Black                     | 88           | 8               | 4               |
| Mixed/Other               | 78           | 16              | 6               |
| Northeast                 | 85           | 9               | 6               |
| Midwest                   | 81           | 14              | 5               |
| South                     | 85           | 12              | 4               |
| Mountain/Plains           | 87           | 8               | 5               |
| Pacific                   | 80           | 15              | 4               |
| Not college graduate      | 78           | 16              | 6               |
| College graduate          | 82           | 13              | 4               |

**Americans agree that different labeling requirements for different recycling methods could lead to less recycling.**

Two-thirds (64%) of Americans believe that if different labeling requirements are set for different recycling methods, it could lead to confusion and ultimately cause people to recycle less often.

**SURVEY QUESTION: If different labeling requirements are set for different recycling methods, it could lead to confusion and cause people to recycle less often.**

|                       | <b>All participants</b> |
|-----------------------|-------------------------|
| Strongly agree        | 33%                     |
| Somewhat agree        | 31                      |
| Somewhat disagree     | 18                      |
| Strongly disagree     | 11                      |
| Not sure              | 7                       |
| <b>TOTAL AGREE</b>    | <b>64</b>               |
| <b>TOTAL DISAGREE</b> | <b>29</b>               |

**Having different labels for advanced and mechanical recycling would lead to more confusion.** Half (51%) of Americans say that if products carried different labels depending on whether the product was made with materials from advanced recycling as opposed to mechanical recycling, it would lead to more confusion. Only 13% of survey participants say that it would be less confusing. A plurality of almost all demographic subgroups say that having different labels would lead to more confusion.

**SURVEY QUESTION: Would you consider it more confusing or less confusing if products carried different labels depending on whether the product was made with materials from advanced recycling as opposed to mechanical recycling?**

**By gender, age, ethnicity, geographic region, and education**

|                           | More Confusing | Less Confusing | No Difference | Not Sure |
|---------------------------|----------------|----------------|---------------|----------|
| <b>TOTAL</b>              | <b>51</b>      | <b>13</b>      | <b>32</b>     | <b>5</b> |
| Female                    | 51             | 14             | 29            | 5        |
| Male                      | 51             | 11             | 34            | 4        |
| Gen Z/Millennials (18-39) | 49             | 10             | 36            | 5        |
| Gen X (40-55)             | 52             | 12             | 32            | 4        |
| Boomers (56-66)           | 50             | 15             | 31            | 3        |
| Silent (67+)              | 51             | 13             | 30            | 6        |
| White                     | 52             | 11             | 33            | 4        |
| Latino                    | 47             | 18             | 29            | 6        |
| Asian                     | 58             | 10             | 30            | 2        |
| Black                     | 47             | 20             | 28            | 5        |
| Mixed/Other               | 59             | 5              | 24            | 12       |
| Northeast                 | 51             | 3              | 40            | 6        |
| Midwest                   | 55             | 11             | 29            | 4        |
| South                     | 50             | 10             | 37            | 3        |
| Mountain/Plains           | 48             | 16             | 32            | 5        |
| Pacific                   | 52             | 11             | 31            | 6        |
| Not college graduate      | 52             | 17             | 25            | 6        |
| College graduate          | 56             | 12             | 28            | 5        |



**Americans agree that mass balance is a valid way to measure recycled content.**

62% of survey participants agree that they consider the mass balance accounting practice, which mixes plastic waste with new materials to produce new products or other raw materials, as a valid way to measure recycled content. Only 14% of survey participants disagree.

**SURVEY QUESTION: In advanced recycling, plastic waste collected for recycling may be mixed with new materials to produce new products or other raw materials. It is impossible to track the molecules that originated from the plastic waste to those new products. So, advanced recyclers use an accounting practice leveraged in sustainable farming and renewable energy, called mass balance. Mass balance rules are set by a third-party certification system and only allow producers to take credit for the amount of plastic waste that was recycled as part of their system. Do you agree or disagree that this is a valid way to measure recycled content?**

|                       | All Participants |
|-----------------------|------------------|
| Strongly agree        | 23%              |
| Somewhat agree        | 39               |
| Somewhat disagree     | 8                |
| Strongly disagree     | 6                |
| Not sure              | 24               |
| <b>TOTAL AGREE</b>    | <b>62</b>        |
| <b>TOTAL DISAGREE</b> | <b>14</b>        |

**Americans consider materials certified using mass balance to be better or the same as other recycled content.**

67% of Americans say that they consider mass balance certified plastics to be better (21%) or the same (46%) than other recycled content. Only 9% would consider mass balance certified plastics to be worse than other recycled content.

**SURVEY QUESTION: Would you consider materials from plastics certified using a mass balance system to be better or worse (or do think it would be about the same) than other recycled content found in products or packaging?**

|                     | All participants |
|---------------------|------------------|
| Much better         | 7%               |
| Somewhat better     | 14               |
| About the same      | 46               |
| Somewhat worse      | 7                |
| Much worse          | 2                |
| Not sure            | 24               |
| <b>TOTAL BETTER</b> | <b>21</b>        |
| <b>TOTAL WORSE</b>  | <b>9</b>         |

**More Americans feel that different labels for recycled products using mass balance would be more confusing.**

44% of survey participants say that it would be more confusing if federal guidelines required different labels for recycled products certified using the “mass balance” system versus other accounting standards, only 12% say that it would be less confusing.

**SURVEY QUESTION: Would you consider it more confusing or less confusing if federal guidelines required different labels for recycled products certified using the “mass balance” system versus other accounting standards, or would it make no difference at all?**

|                             | All participants |
|-----------------------------|------------------|
| Much more confusing         | 20%              |
| Somewhat more confusing     | 24               |
| No difference               | 32               |
| Somewhat less confusing     | 6                |
| Much less confusing         | 6                |
| Not sure                    | 12               |
| <b>TOTAL MORE CONFUSING</b> | <b>44</b>        |
| <b>TOTAL LESS CONFUSING</b> | <b>12</b>        |

**Americans express support for mass balance recycling methods.**

64% of survey participants say that they support a mass balance approach to accounting for recycled content in the US. Only 13% of survey participants oppose.

**SURVEY QUESTION: Other industries use “mass balance” accounting systems to track certified and non-certified ingredients in manufacturing processes, especially in industries with complex supply chains. For example, both the coffee and cocoa industries use “mass balance” to certify sustainably produced beans. Knowing that “mass balance” is a certification method used by other industries, do you support or oppose this kind of approach to accounting for recycled content in the United States?**

|                      | All participants |
|----------------------|------------------|
| Strongly support     | 25%              |
| Somewhat support     | 39               |
| Somewhat oppose      | 8                |
| Strongly oppose      | 5                |
| Not sure             | 22               |
| <b>TOTAL SUPPORT</b> | <b>64</b>        |
| <b>TOTAL OPPOSE</b>  | <b>13</b>        |

**Americans expect that a product labeled as recyclable can be recycled in all or most areas where it’s sold.**

When asked to consider their specific expectations about what it means when a product is labeled as recyclable, only 33% expect that it can be recycled anywhere, regardless of local systems. A majority of participants (53%) say that they expect the item is recyclable only in some or most areas, while 10% don’t expect that the product is recyclable.

**SURVEY QUESTION: Not all recycling facilities can process the same materials. As a result, a plastic cup or pizza box might be suitable for the recycling bin in one city but belong in the waste bin somewhere else. Which of the following comes closest to describing your expectations when you see a product or package labeled as recyclable?**

|  | All participants |
|--|------------------|
| I expect the product can be recycled in most areas where it is sold.                   | 29%              |
| I expect the product can be recycled in some areas, depending on local systems.        | 24               |
| I expect the product can be easily recycled in all areas, regardless of local systems. | 33               |
| I don’t expect the product is recyclable, regardless of how it is labeled or branded.  | 10               |
| Not sure   | 4                |

**METHODOLOGY**

RG Strategies conducted 1200 interviews between February 22<sup>nd</sup> and February 28<sup>th</sup>, 2023. The survey used mixed modes of telephone (landlines and mobile) and text-to-web. Respondents were US voters. The survey was conducted in English and Spanish. The margin of the sampling error is ±2.8% at the 95% confidence level.