

THE CIRCULAR VOICE

A SURVEY OF 5,000 CONSUMERS ABOUT CIRCULAR PRODUCTS AND MATERIALS



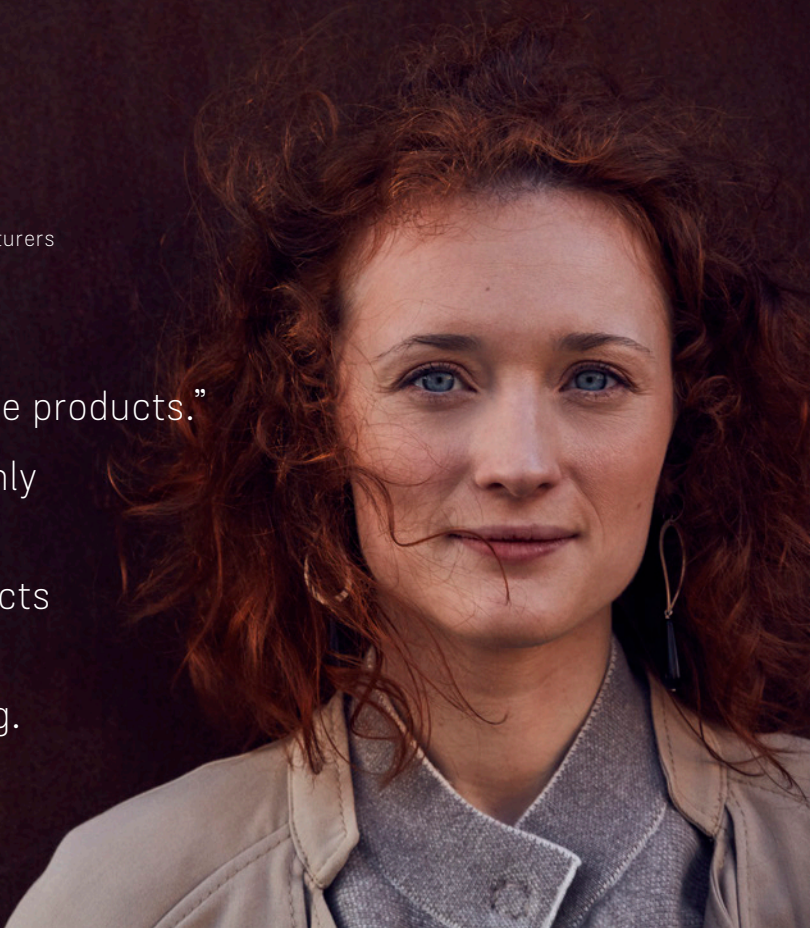
What consumers say about their expectations of manufacturers and retailers for sustainable products:

“Make it easy to source sustainable products.”

“Make sustainable products the only versions available.”

“We want more sustainable products - it’s your job to provide them.”

“This is where the world is heading. There’s no time to lose.”



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BACKGROUND

GREATER KNOWLEDGE OF CONSUMER ATTITUDES

Until now, the goals companies set for the climate impact of their products have received greater attention than the attitudes and expectations of consumers to circular products. In January 2022, Stena Recycling conducted a survey, in collaboration with the research company Origo Group, that investigated consumer attitudes to circular materials, in Sweden, Norway, Finland, Denmark and Poland.

In each country, 1,000 consumers were asked for their views on recycled materials, product characteristics and availability, consumption patterns, barriers and their expectations of those involved. In particular, the survey focused on products that contain recycled material and are recyclable.

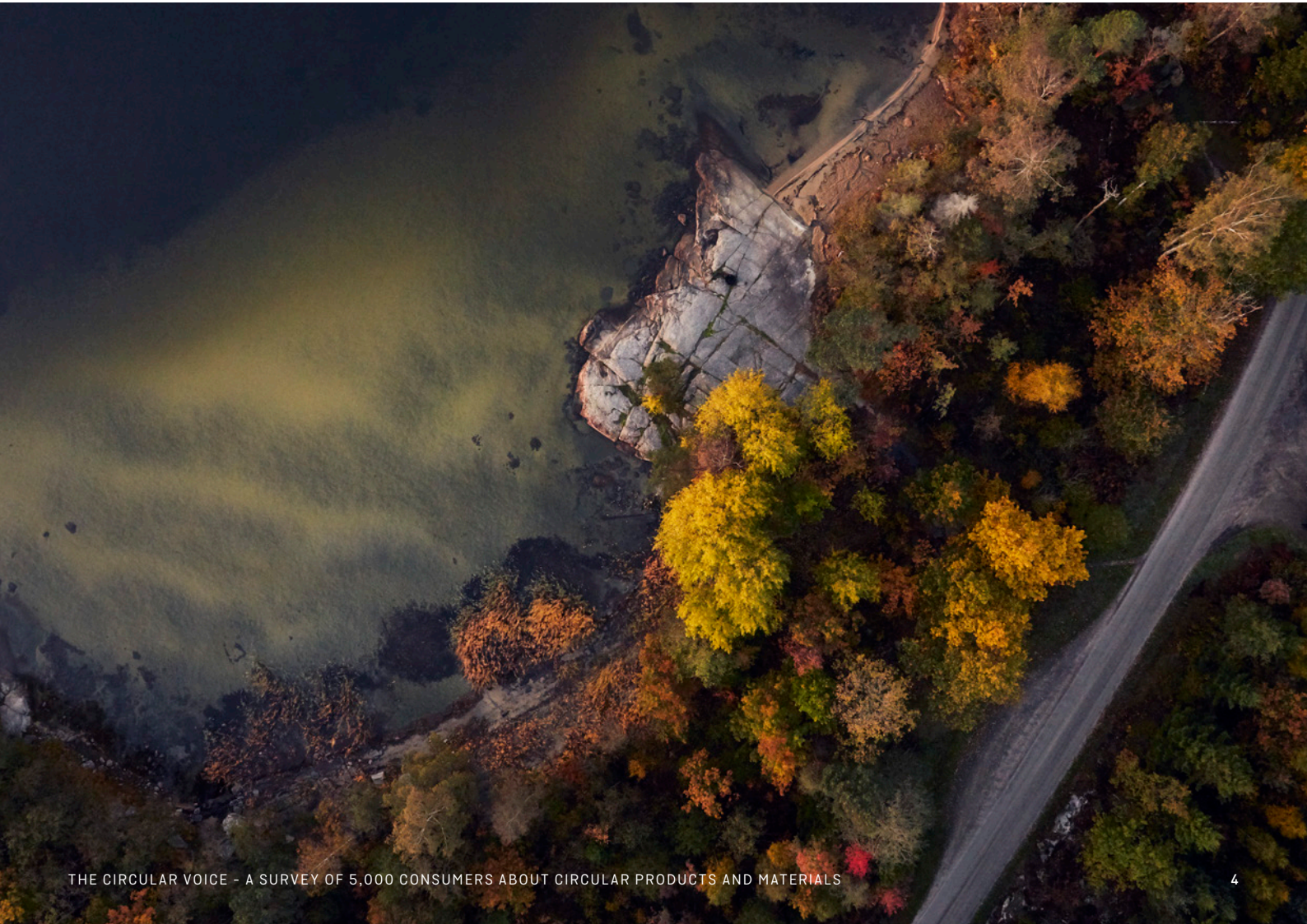
THE CIRCULAR ECONOMY

Every year, around 100 billion tonnes of virgin raw materials are extracted around the world. In a circular economy, these materials are kept in circulation for as long as possible and can be used as resources for new products, over and over again. The increased use of recycled materials and recyclable products decreases our dependence on virgin resources and results in significantly reduced climate impact.

In a circular economy, materials are kept in circulation according to the principle of **reduce-reuse-recycle**. This is the opposite approach to that of a linear economy, which uses the **take-make-dispose** principle that has dominated consumption patterns for centuries. Early manufacturing processes were developed in times when natural resources were considered to be infinite. Nowadays, we know this isn't the case. Resources have been over-consumed for decades and the use of virgin raw materials has a major effect on emissions.

PRODUCTS WITH LOWER CLIMATE IMPACT

Manufacturers are increasingly aware that material selection has a major effect on the climate impact of products, throughout their lifecycle. For example, using recycled materials and designing products that can be repaired, reused and recycled decreases their climate impact and offers consumers a climate-smart choice. The European Commission estimates that 12% of the material resources used in the EU come from recycled products and materials. The Material Economics report **The Circular Economy - A Powerful Force for Climate Mitigation** shows that circular material flows could reduce the EU's industrial climate emissions by up to 56% by 2050.



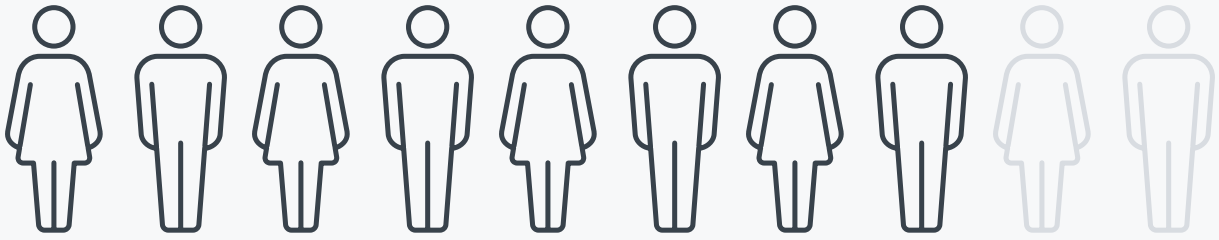


ABOUT STENA RECYCLING

Stena Recycling conducts recycling operations at 160 facilities in Sweden, Norway, Denmark, Finland, Poland, Germany and Italy. Each year, it recycles six million tonnes of waste from around 100,000 customers in a wide range of industries. The high-quality recycled raw materials it produces are sold as circular products around the world.

Stena Recycling builds circular partnerships with its customers that work on the entire value chain of materials. Its experts help companies create sustainable solutions that support a circular economy, through product design and training, as well as optimizing processes and material flows. These measures support the transition to climate neutrality and circular business models.

www.stenarecycling.com



8 out of 10 highly value the use of recycled material in products.

8 out of 10 want clear labeling for products that contain recycled material.

65%

are willing to change their consumption patterns to achieve a climate-smart lifestyle.



Consumers think manufacturers should take the primary role in increasing the use of recycled materials.



Inadequate product labeling and limited availability are the main barriers to buying climate-smart products.

THE VOICES OF CONSUMERS AND DECISION MAKERS

CIRCULAR PRODUCTS INCREASE CONSUMER ENGAGEMENT

We generally estimate that as much as 80% of a product's environmental impact is determined at the design stage. Material selection and construction, determined at this phase of product development, offer the greatest opportunities to minimize climate impact and enable easy recycling. This survey reveals that as many as 70% see the use of recycled materials as important, or very important, in their assessment of products. The recyclability of products is rated even higher, as 78% consider it important.

A large majority, 65% in the five countries surveyed, are willing to change their consumption patterns to achieve a climate-smart lifestyle and are willing to pay the same (64%), or more (22%), for products that contain recycled materials and can be recycled. Those surveyed also believe it's, primarily, the responsibility of companies to promote circular products that use more recycled materials.

The survey investigated the barriers that inhibit consumers from making climate-conscious decisions and, therefore, it highlights the areas that manufacturers and retailers should consider. When asked what were perceived as the main obstacles to buying products made from recycled materials, 27% considered lack of clarity the main obstacle, while 26% cited product availability as the primary barrier.

WHAT COMPANY DECISION MAKERS THINK

The results of this consumer survey can be compared with the opinions that Stena Recycling gathers from manufacturing and retail companies at the industry events it organizes. The **From waste to circular products** event, in spring 2021, consulted 350 decision makers about their use of circular raw materials and their company's expertise in developing circular products.

When asked, 32% didn't know how much recycled material their companies used, 16% said they used more than 50%, 36% used less than 50% and 16% that they used no recycled material at all. However, 39% considered they should use more than 50% recycled material in their products, within the next three years.

Decision makers were also asked if they thought their company had the necessary expertise to develop circular products. 50% did not, 25% thought they did and 25% didn't know. The conclusion, from these responses, is that companies have identified the need to develop more circular products, in the coming years, but require the expertise to achieve these goals. A striking number of decision makers (32% and 25% respectively) had no knowledge of the recycled material content in their products or if they needed to develop the expertise to produce circular products.



Pens made from recycled plastic awaken the interest of retailers and users

Ballograf have produced a special edition of their classic Epoca pen made from recycled hard plastic. Stena Recycling's high-quality recycled raw materials made manufacturing the pens simple.

"There's been a great deal of interest in this product's circular values, throughout the value chain.

As manufacturers, we want to reduce our climate impact. Our retailers want to offer a more sustainable range and consumers want to make climate-smart choices", says Mattias Holm, Sales Manager at Ballograf.





ATTITUDES TO CIRCULAR PRODUCTS AND MATERIALS

AVAILABILITY OF PRODUCTS

This survey shows there's high demand for sustainable products but that a gap exists between consumer willingness to buy them and their availability. 70% of those surveyed considered it important, or very important, that a good range of products are available that enable a sustainable lifestyle. Less than half (48%) believed there is currently a sufficient supply of products to meet this demand.

78% of the consumers surveyed in Poland considered product availability to be most important, corresponding with almost 17.5 million consumers in the 18 to 65-year-old target group. Only 57% of the consumers surveyed in Norway highly valued a good range of products, which represents 1.9 million consumers, across the country as a whole. In all the countries surveyed, 30 to 39-year-olds consider product availability to be most important, followed by 18 to 29-year-olds.

In all five countries combined, 16% considered the availability of sustainable products to be inadequate. This represents a group of 6.2 million consumers that believe there's an insufficient supply of products that enable a sustainable lifestyle. The consumers surveyed in Sweden, Poland and Finland were the least satisfied with the availability of sustainable products, while those in Denmark and Norway were the most satisfied. In Sweden, the survey suggests almost 1.2 million consumers in the target group are dissatisfied with the availability of sustainable products. In Norway, it suggests just under 270,000 consumers are dissatisfied with the range of products currently available. Among the 18 to 29-year-olds surveyed in Poland, one in four of those that considered a good supply of sustainable products to be important, believed that the availability of products was insufficient.

"The survey shows that consumers are ready for circular, sustainable products and that this trend is likely to grow. However, availability is often very limited, which makes it difficult for consumers to make active choices. At the same time, many consumers contribute to circular flows, for example, by sorting their waste. There are great opportunities for producers to take the lead in developing sustainable products and business models. I believe that development could be rapid, if we see a change among the major players. Others will then follow and the game plan will change. Therefore, it's important for companies to start reviewing the opportunities to buy and use recycled materials, as well as how they develop their product design and business models to fit in a circular system", says Stina Klingvall, a consultant at Stena Circular Consulting.

Stena Circular Consulting collaborates with companies in the design and development of products, process flows and business models. It also helps with strategic issues for the transition to climate neutrality and circularity.



Stina Klingvall
Consultant at
Stena Circular Consulting

CONSUMER EXPECTATIONS FOR COMPANIES

Almost 80% of those surveyed considered it important, or very important, that manufacturers use recycled materials in their products. **This represents almost 30 million people in the five countries surveyed.** Among consumers in Poland, 81%, representing 18.1 million consumers, thought it important, or very important. In Norway, there was a lower percentage, where only 61% of the respondents, representing 2.1 million people, considered it important.

For consumers, an important feature in evaluating sustainability is how much energy products consume when they're used. Other priorities include, easy-to-understand product information, repairability and recyclability. Consumers need information concerning the materials used and energy consumption, in both manufacturing and using products, as well as the ease with which they can be repaired and recycled.

Especially in Poland, respondents considered it important to assess the energy consumption of products, as electricity costs there are relatively high. In the lowest income group, the ability to repair products is considered more important than for other demographic groups.

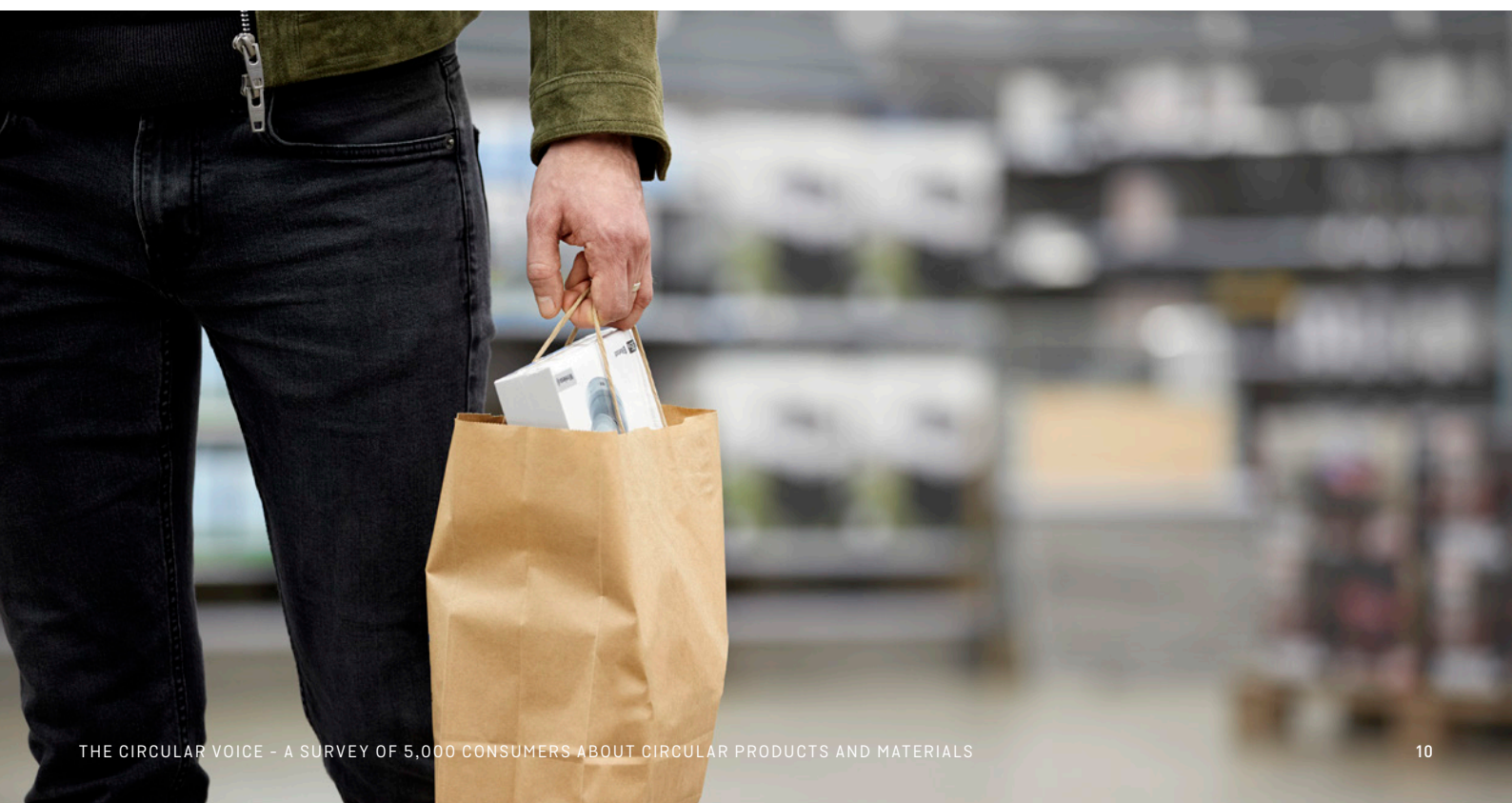
First and foremost, consumers believe that it's the responsibility of companies to drive development towards an increased use of circular materials. Our research shows that consumers want to be able to evaluate the sustainability of products. In addition to companies, consumers also have a responsibility to contribute to sustainable development, as well as politicians and authorities.

The results concerning this issue differ by country. In Finland and Poland, many more believe that the business community should drive development. In Sweden and Norway, it's considered that politicians and authorities also have an important role, as well as consumers. In Denmark, equal numbers believe that consumers should drive development as those who think it's a task for the business community.

"In our survey, a large number of respondents took the opportunity to address manufacturers and retailers in their own words, regarding their expectations for sustainable products. It was striking that many sought to support business efforts by offering tips on, among other things, product development and labeling. This commitment is a great asset for manufacturing companies, who can benefit from customer ideas and interest", says Anna Sundell, Sustainability Manager for the Stena Metall Group.



Anna Sundell,
Sustainability Manager,
Stena Metall Group



VIEWS ON QUALITY AND WILLINGNESS TO PAY MORE

A significant majority, 66% of the target group, believe that products made from recycled materials are of the same quality as products made from virgin raw materials. This represents 25.7 million consumers in the countries we surveyed. 30 to 39-year-olds are most positive about the quality of recycled products, compared to other age groups. At the same time, one-fifth still have no firm opinions on the quality of products made from recycled materials.

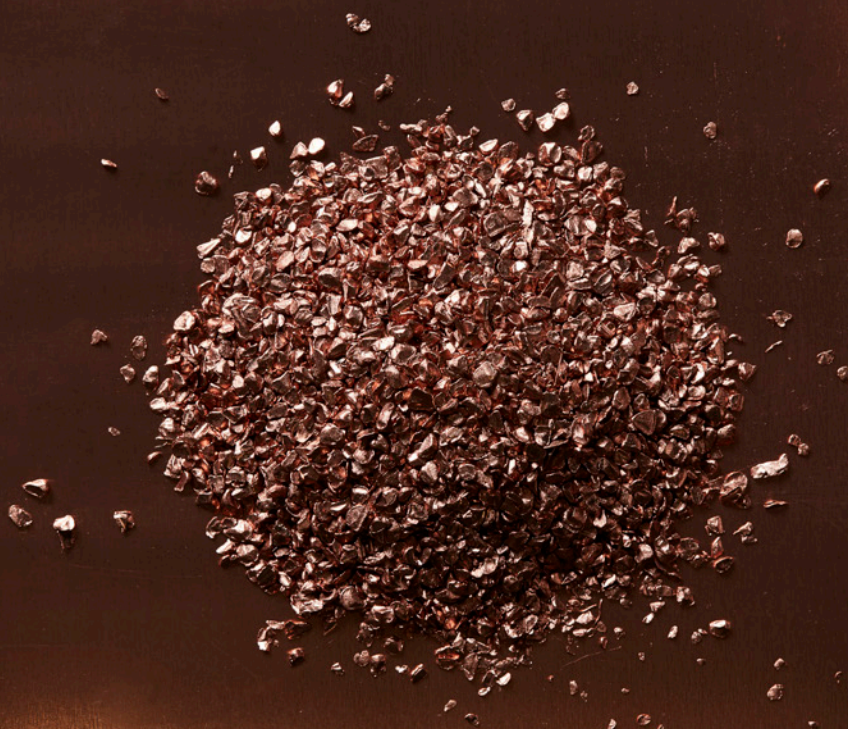
“Material selection has become a strategically important issue for manufacturing companies. In the past, we primarily refined waste in our recycling processes and sold the recycled raw materials. Nowadays, we work closely with customers in circular partnerships that optimize resource management throughout the value chain. Design for recycling and the optimization of material flows in production are examples of this, but a lot of work is also being carried out on raw materials. Through extensive investments, the recycling of traditional materials, such as ferrous and non-ferrous metals, has been developed. In addition, a greater number of materials can be recycled, including various plastics and battery contents. These developments have produced raw materials of even higher quality that can compete with virgin raw materials, higher in the value chain. This offers manufacturers access to circular materials that reduce the climate impact of their products. Circular raw materials, with the right qualities, are key to offering the products that consumers are demanding in our survey”, says Mattias Rapaport, Head of Non-Ferrous & Stainless Steel at Stena Metal International. The company sells raw materials produced by recycling to customers around the world.

Views on the quality of circular materials vary, depending on the importance those surveyed place on the use recycled material. 72% of the respondents that thought it was important believed products made from recycled material are of equal quality to those made from virgin raw materials. Among respondents who didn't think it important, only 43% believed products made from recycled material are of an equal quality.

20% of those surveyed are willing to pay more for products that are made from recycled materials and are recyclable. Willingness to pay more differs. Again, this depends on overall attitudes to the importance of circular materials. 10% in the group that do not think it important are willing to pay more, while 25% of those who think it is important are willing to pay more for products made from recycled material.



Mattias Rapaport,
Head of Non-Ferrous
& Stainless Steel,
Stena Metal International



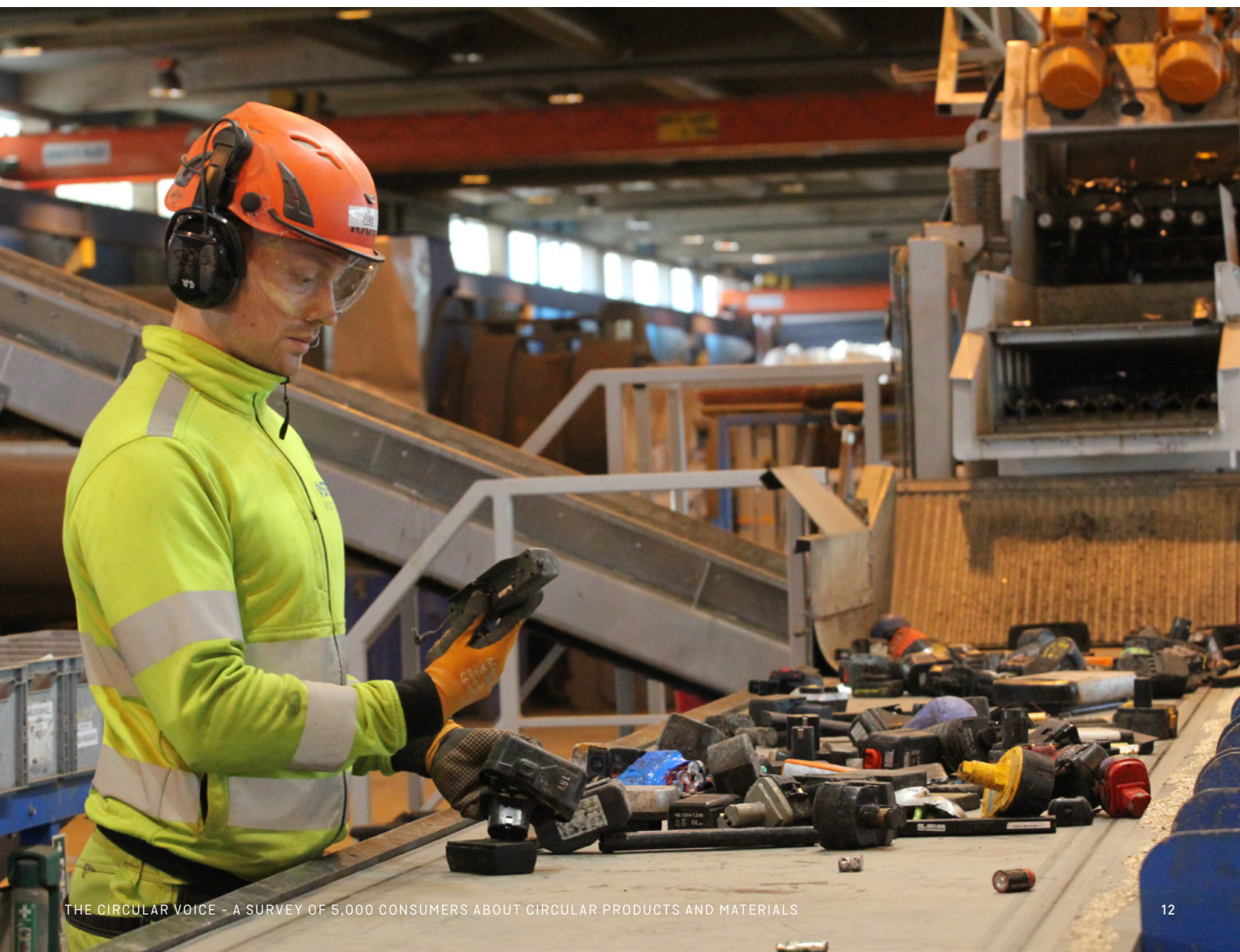
RECYCLABILITY

A significant majority, 7 out of 10, think it's important that the products they buy can be recycled.

In the countries surveyed, this represents 26.8 million consumers, who believe it's important that the products they buy can be recycled.

There is strong support for a ban on non-recyclable products. 40% believe that manufacturers should be banned from producing and selling non-recyclable products, although there are clear differences between the countries surveyed. While 45% in Sweden advocate legislation, only 34% in Finland and 32% in Denmark would support a ban. 41%, representing over 9 million consumers, in Poland are in favor of a legislative ban.

"It's pleasing to see that consumers attach great importance to the recyclability of products. As the survey shows, there is a need for standardization, with uniform definitions that can guide consumers. Recyclability is a complex issue. We work with companies on a day-to-day basis to create a deeper understanding of recycling processes and how product design and changing attitudes can create the conditions for increased recyclability", says Stina Klingvall, Consultant at Stena Circular Consulting.





ASSESSMENTS AND OBSTACLES IN BUYING BEHAVIOR

80% of those surveyed stated that the lifespan of a product - if it can easily be repaired or reused - had a strong effect on their buying behavior. Among women, more than half stated this made a very high impact. There were no recognizable differences in attitudes between the countries surveyed, although overall views on the use of recycled materials affected responses to this issue.

Of the 20% who considered the use recycled materials to be unimportant, only one in four stated that product lifespan affected their buying behavior. Among those who considered it important, the majority also considered product lifespan an important factor in their decision making.

Failing to engage with sustainability issues can prove costly for manufacturers and retailers. Overall, 40% of those surveyed stated that, in the last year, they had decided against buying products or investing in brands that they perceived as failing to meet their sustainability expectations. In Sweden, the figure was 44% (representing 2.7 million consumers), in Finland 42% (1.4 million), in Poland 38% (8.5 million), in Norway 37% (1.2 million) and in Denmark 32% (1.1 million). Men, who generally think these issues are less important, are marginally more likely to be affected by sustainability issues than women (40 and 38%, respectively). Income and education has a discernable effect on buying behavior, with high earners more likely to select products based on their sustainability than those from lower income and education groups.

80% of all those surveyed believed it's important that products are labeled with the amount of recycled material they contain, in order to make informed decisions about the products they buy. However, in Denmark and Norway, more than 10% believe this is not important at all. Page 25 gives more detailed results about the obstacles consumers perceive.

There are still some barriers for consumers wishing to buy products made from circular materials. The major obstacle is a lack of clear information about the content of recycled material. 27% of all those surveyed found this to be a problem.

"There are huge opportunities for companies that meet consumer expectations for sustainable products and that are preemptive in their circular initiatives. Some are already working towards this, although many have not yet fully mapped their customers' attitudes to sustainability. In this respect, our survey can offer some support. Offering clear, transparent information is also important. To a large extent, communication about sustainable products has been conducted from a marketing perspective. Today's customers are well-read, committed and expect concrete information, rather than vague marketing messages. The transition to circular value chains takes time. By being open about where you stand and where you're going, you can build trust and clarify development work that increases circularity over time", says Anna Sundell, Sustainability Manager, Stena Metall Group.

Another barrier to pursuing a sustainable lifestyle is the limited availability of products made from recycled materials. 26% of all those surveyed (representing 10.1 million consumers) expressed this opinion.

Price also represents a barrier for consumers. 22% of all those surveyed (representing 8.5 million consumers) thought products made from recycled material cost too much and that price affected their buying behavior.

"Clear information, making comparison between products easier, is important in helping consumers make the right choice. For example, there is often confusion among consumers about the difference between products that are recyclable and those made from recycled material. Another important aspect is the amount of recycled raw materials used in products. Often a combination of recycled and primary materials are used, in order to achieve the right quality", says Stina Klingvall, Consultant at Stena Circular Consulting.

CONSUMPTION PATTERNS AND LIFESTYLE

The majority, 65%, of all those surveyed aged between 18 and 65, are willing to fully, or partially, adjust their consumption of products in order to contribute to reducing climate impact. This suggests that 25.3 million consumers, in the five countries surveyed, are willing to alter their buying behavior.

A willingness to alter consumption is high in all the countries we surveyed. In Poland, 70% (representing 15.7 million consumers), in Sweden, 62% (3.8 million), in Finland, 59% (1.9 million), in Denmark, 58% (2.1 million) and, in Norway, 56% (1.9 million) of those surveyed stated they were willing to adjust their consumption patterns in order to reduce climate impact.

Surprisingly, the youngest group we surveyed, 18 to 29-year-olds, were least willing to alter their consumption patterns, in comparison to older consumers. Women were more willing to change than men. 10% of the men we surveyed were unwilling to amend their buying behavior. Among the more highly educated, there was greater willingness to change their consumption patterns, as well as in the lowest income group.

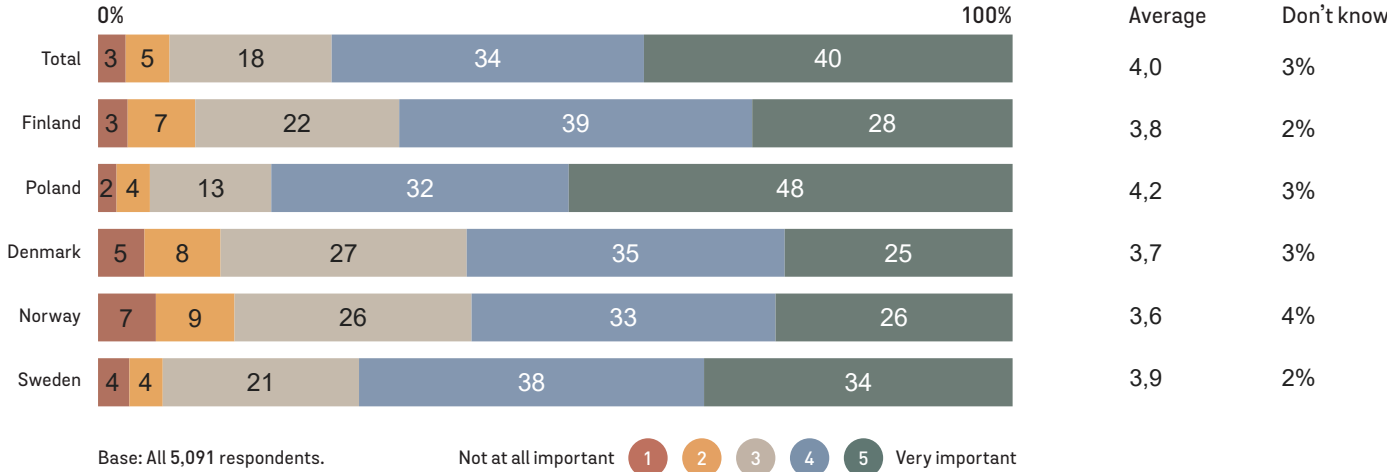
Attitudes to circular materials are reflected in consumers' willingness to adapt their consumption, in order to contribute to reduced climate impact. Among those who don't think the use of circular materials is important, 45% are unwilling to adjust their consumption, in comparison with only 3% in the group who think the use of recycled materials is important.



RESPONSES TO QUESTIONS, BY COUNTRY, AND IN TOTAL

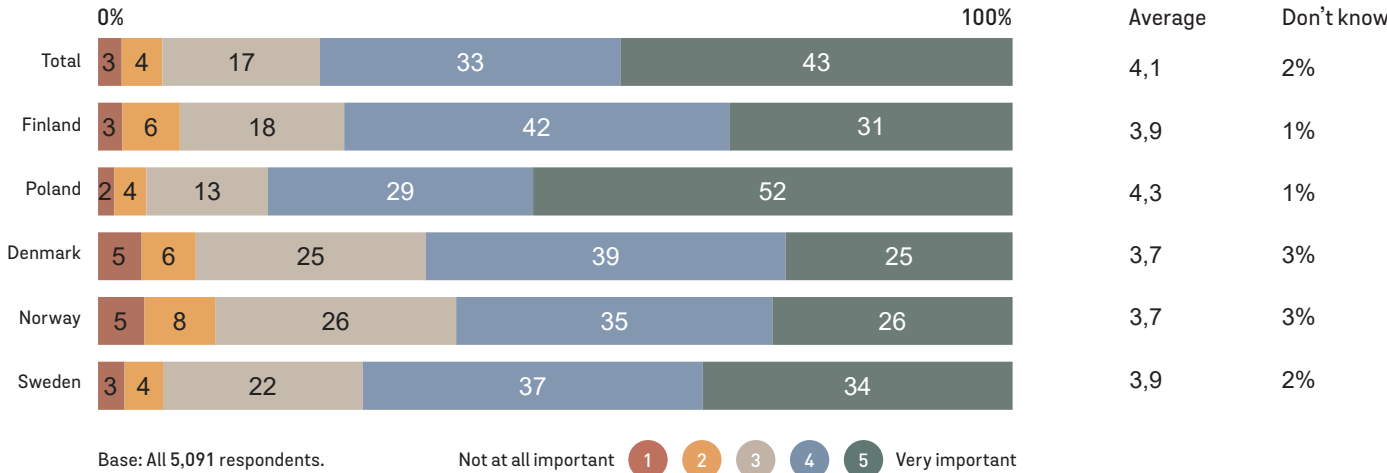
HOW IMPORTANT IS IT THAT THERE'S A GOOD SUPPLY OF PRODUCTS THAT ENABLE A SUSTAINABLE/CLIMATE-SMART LIFESTYLE?

70% of all those we surveyed believed it was important, or very important, that there's a good range of products that enable a sustainable/climate-smart lifestyle. A large number in Poland thought this was important, while in Norway and Denmark fewer respondents thought that climate-smart products were important.



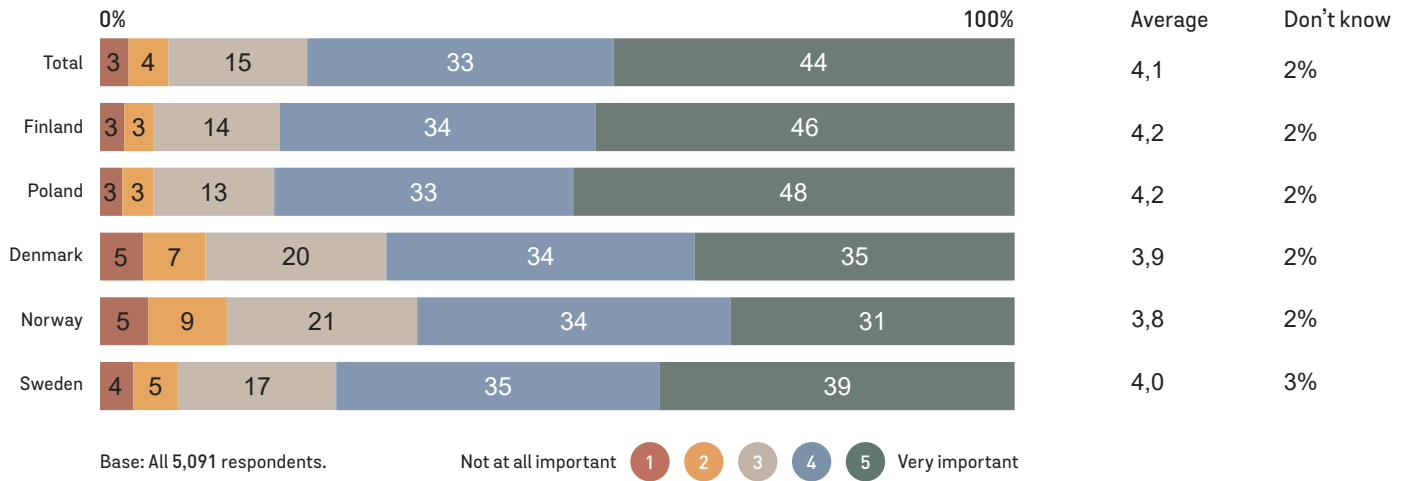
HOW IMPORTANT DO YOU THINK IT IS THAT MANUFACTURERS USE RECYCLED MATERIAL IN THEIR PRODUCTS?

Almost 80% of all those surveyed considered it important, or very important, that manufacturers use recycled materials in their products.



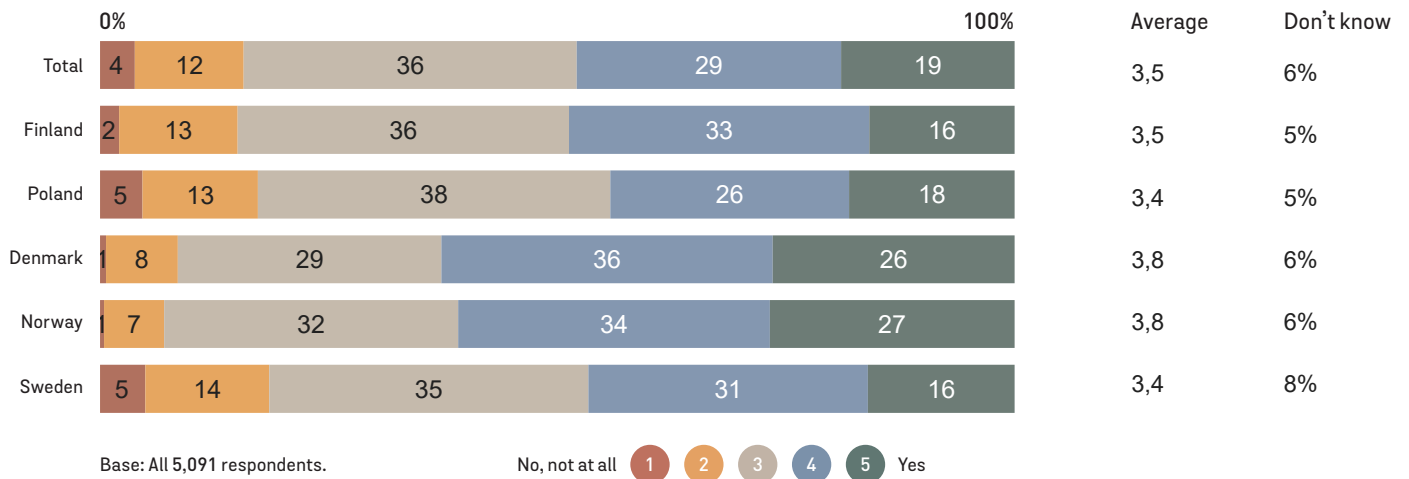
HOW IMPORTANT IS IT TO YOU THAT PRODUCTS ARE CLEARLY MARKED IF THEY ARE MADE FROM RECYCLED MATERIAL?

Almost 80% of all those surveyed considered it important, or very important, that products are clearly marked if they are made from recycled material.



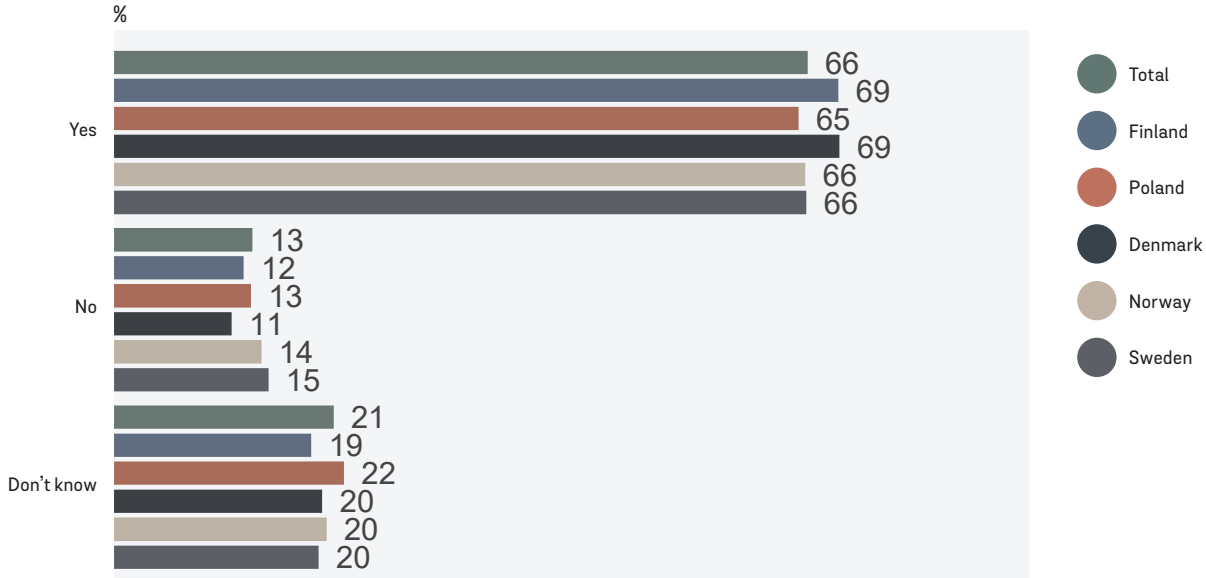
DO YOU THINK THERE IS AN ADEQUATE RANGE OF PRODUCTS THAT ENABLE A SUSTAINABLE/CLIMATE-SMART LIFESTYLE?

Just under half (48%) believed that there is an adequate range of products that enable a climate-smart lifestyle.



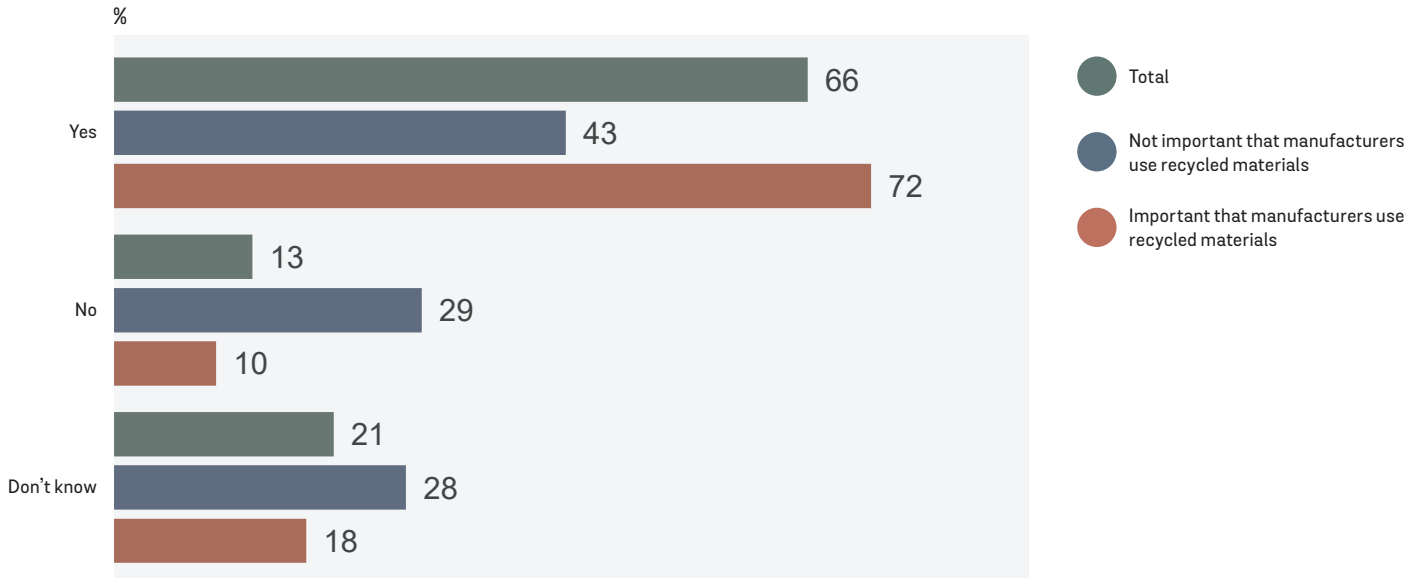
DO YOU THINK THAT PRODUCTS MADE FROM RECYCLED MATERIAL ARE OF AN EQUAL QUALITY TO PRODUCTS MADE FROM VIRGIN RAW MATERIAL?

A significant majority (66%) believed that products made from recycled materials are of an equal quality to products made from virgin raw materials.



Base: All 5,091 respondents.

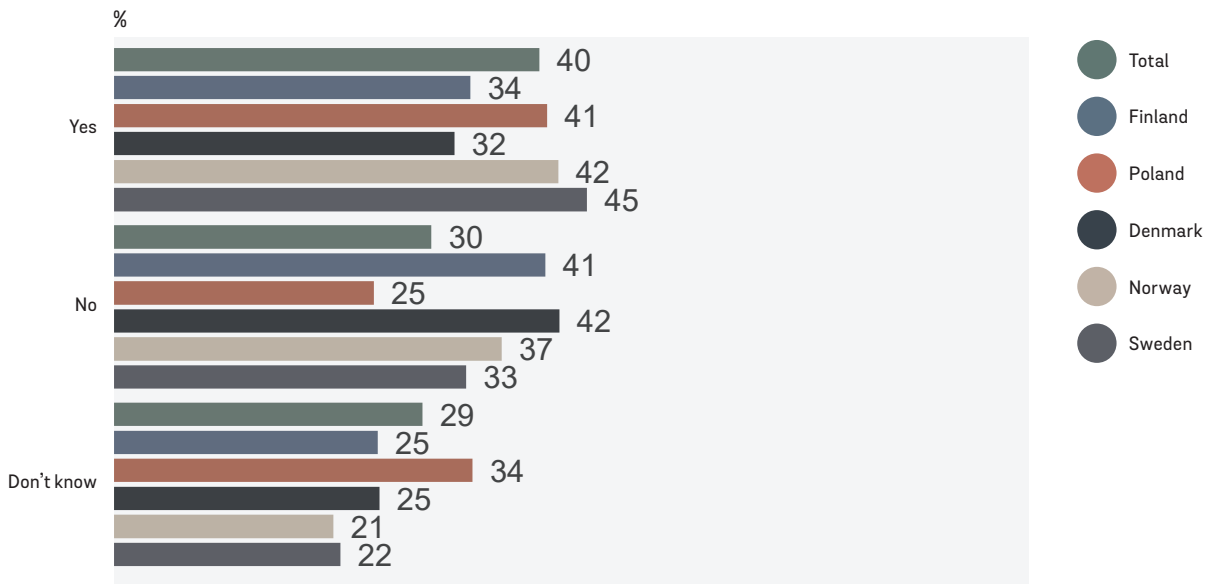
Of the respondents that considered it important that manufacturers use recycled material, 72% believed that products made from recycled material are of an equal quality to products made from virgin raw material. In comparison, among respondents that didn't think it important only 43% thought they were of an equal quality.



Base: Of all the respondents that considered it unimportant that manufacturers use recycled materials, n=461. Of those that consider it important, n=3463.

SHOULD MANUFACTURING AND SELLING NON-RECYCLABLE PRODUCTS BE BANNED?

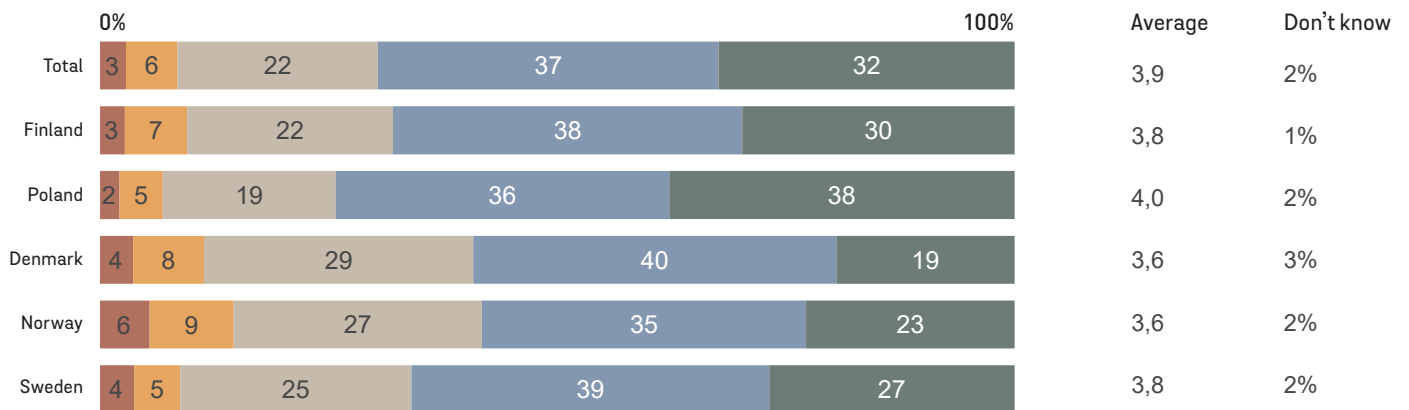
40% of all those surveyed thought manufacturing and selling non-recyclable products should be banned.



Base: All 5,091 respondents.

HOW IMPORTANT IS IT THAT THE PRODUCTS YOU BUY CAN BE RECYCLED?

A significant majority, 69%, thought it was important that the products they buy could be recycled.

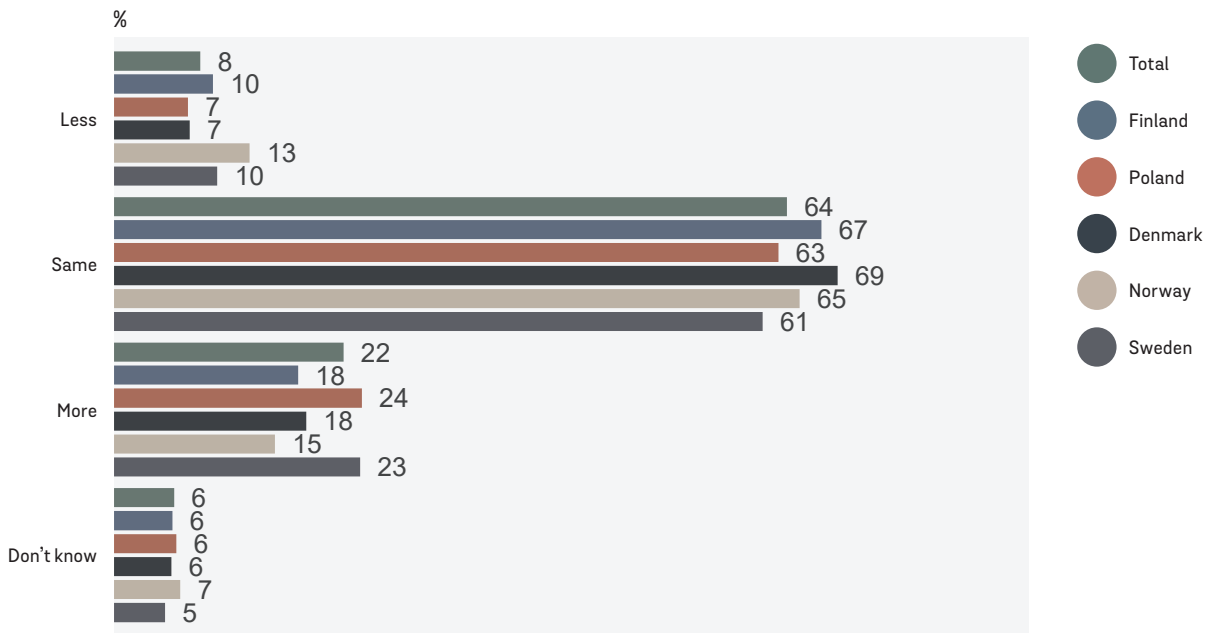


Base: All 5,091 respondents.

Not at all important 1 2 3 4 5 Very important

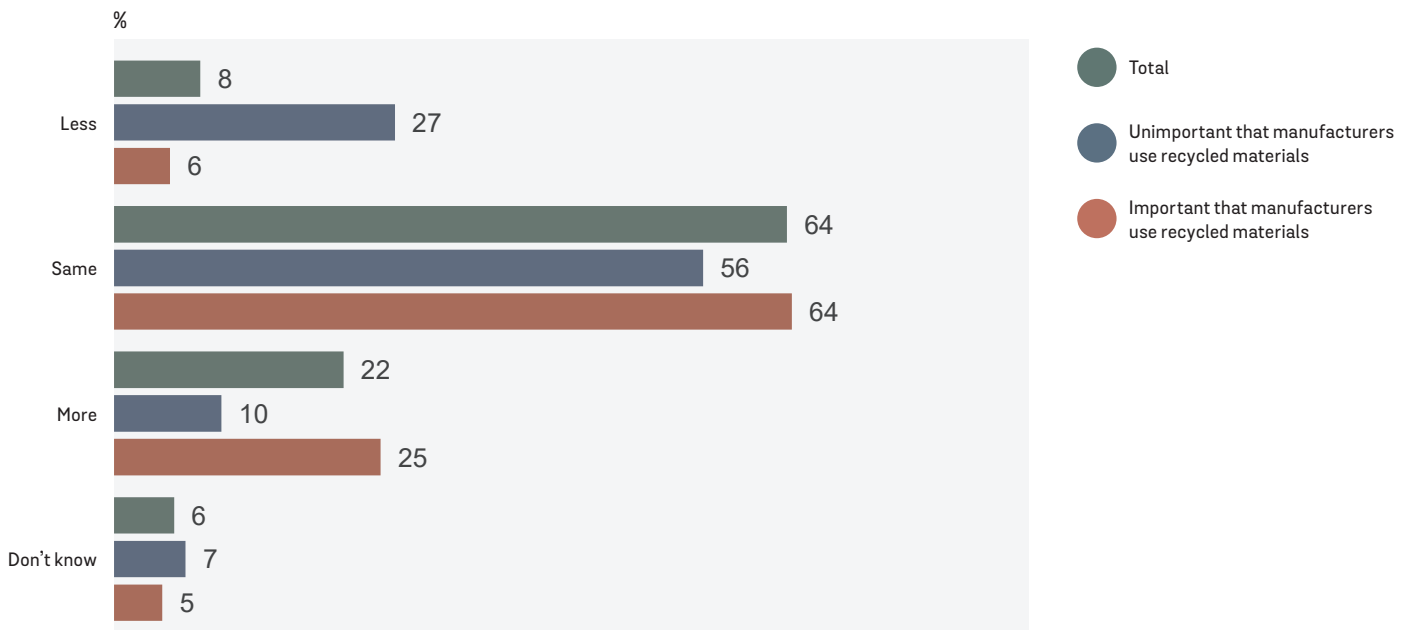
ARE YOU WILLING TO PAY MORE FOR PRODUCTS MADE FROM RECYCLED MATERIAL AND THAT CAN BE RECYCLED?

20% of all those surveyed were willing to pay more for products made from recycled materials and that can be recycled.



Base: All 5,091 respondents.

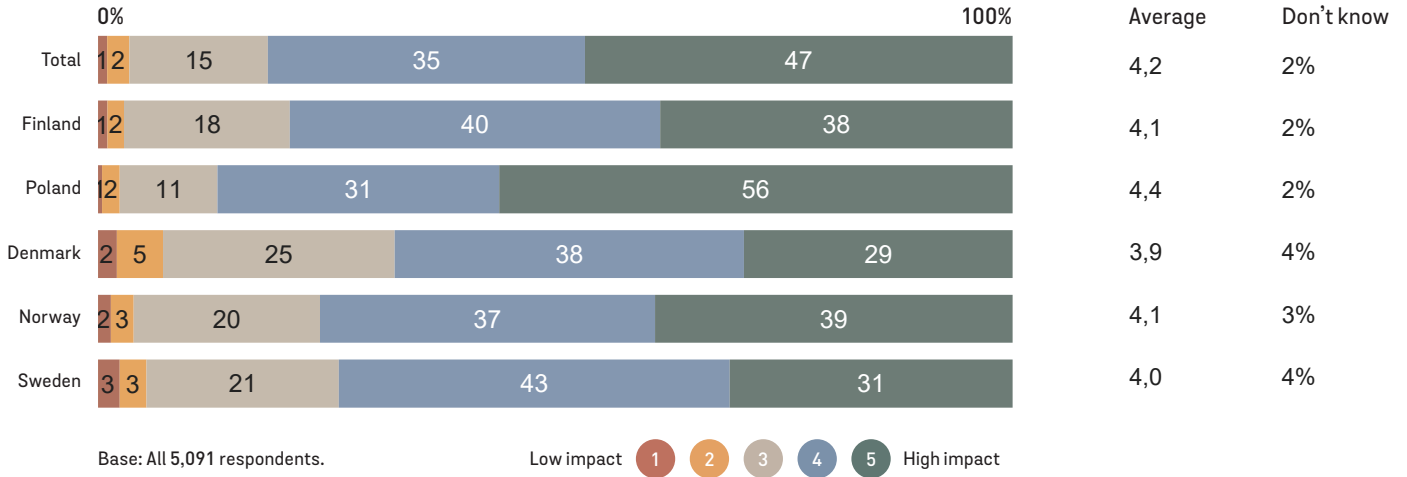
In the group that considered products made from recycled materials to be unimportant, 27% would only buy them if they cost less than other products. In the group that considered the use of recycled material to be important, 25% were willing to pay more for products made from recycled materials.



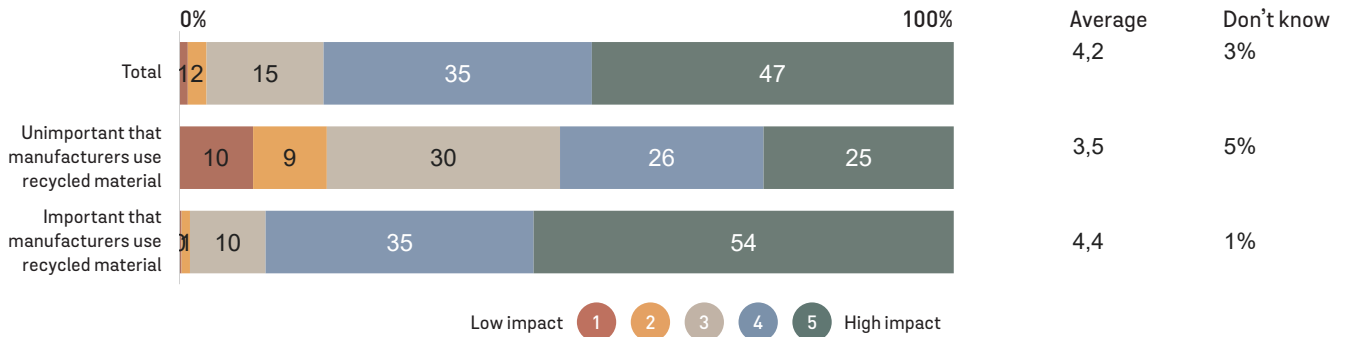
Base: Of all the respondents that considered it unimportant that manufacturers use recycled materials, n=461. Of those that consider it important, n=3463.

WHAT EFFECT ON YOUR BUYING BEHAVIOR DOES THE LIFESPAN OF A PRODUCT HAVE? FOR EXAMPLE, IF IT'S EASY TO REPAIR OR THE COMPONENTS CAN BE REUSED?

80% of all those surveyed stated that product lifespan made a significant impact on their buying behavior.



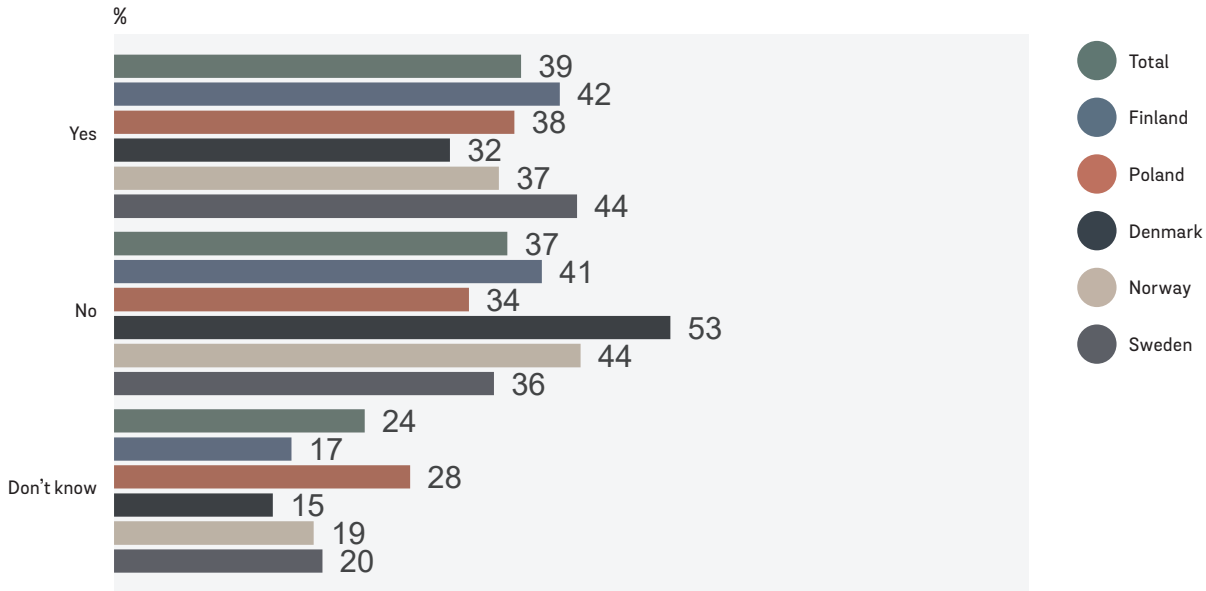
In the group that considered the use of recycled material to be unimportant, only 25% thought the lifespan of products to made a very high impact on their buying behavior. In the group that considered the use of recycled materials to be important, 54% thought lifespan made a high impact on their buying behavior.



Base: Of all the respondents that considered it unimportant that manufacturers use recycled materials, n=461. Of those that consider it important, n=3463.

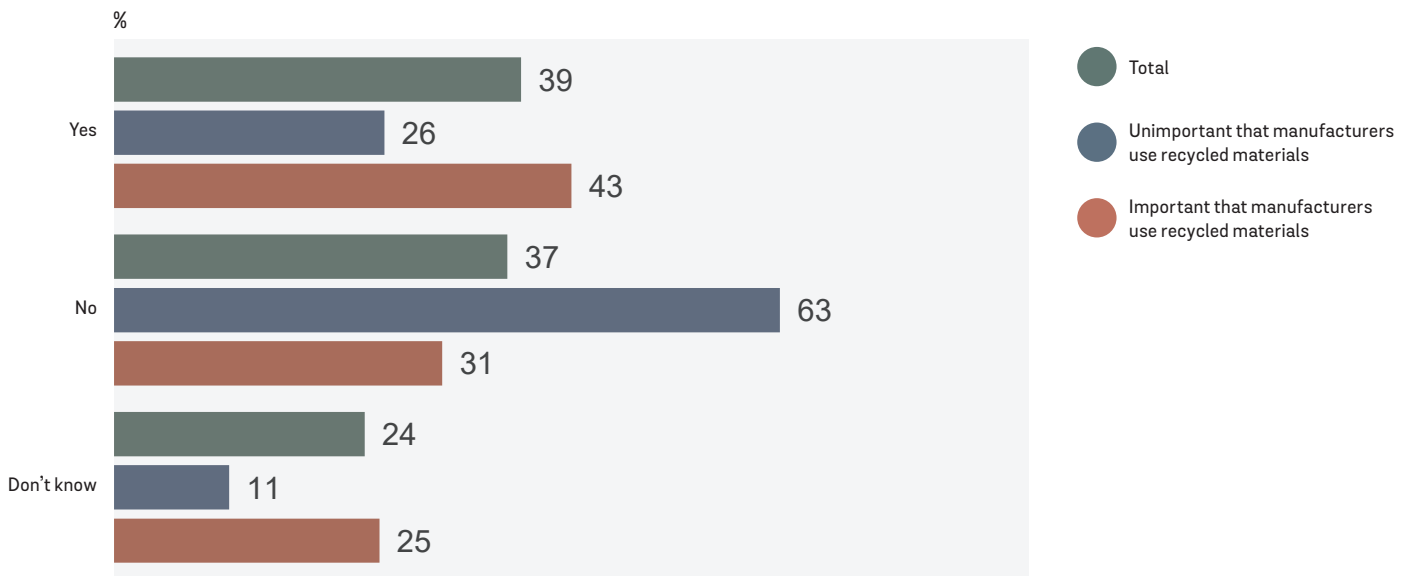
IN THE LAST FEW YEARS, HAVE YOU REJECTED PRODUCTS OR BRANDS THAT FAILED TO MEET YOUR EXPECTATIONS FOR SUSTAINABILITY?

In the last few years, 39% of all those surveyed have rejected products or brands that they consider are failing to meet their expectations for sustainability.



Base: All 5,091 respondents.

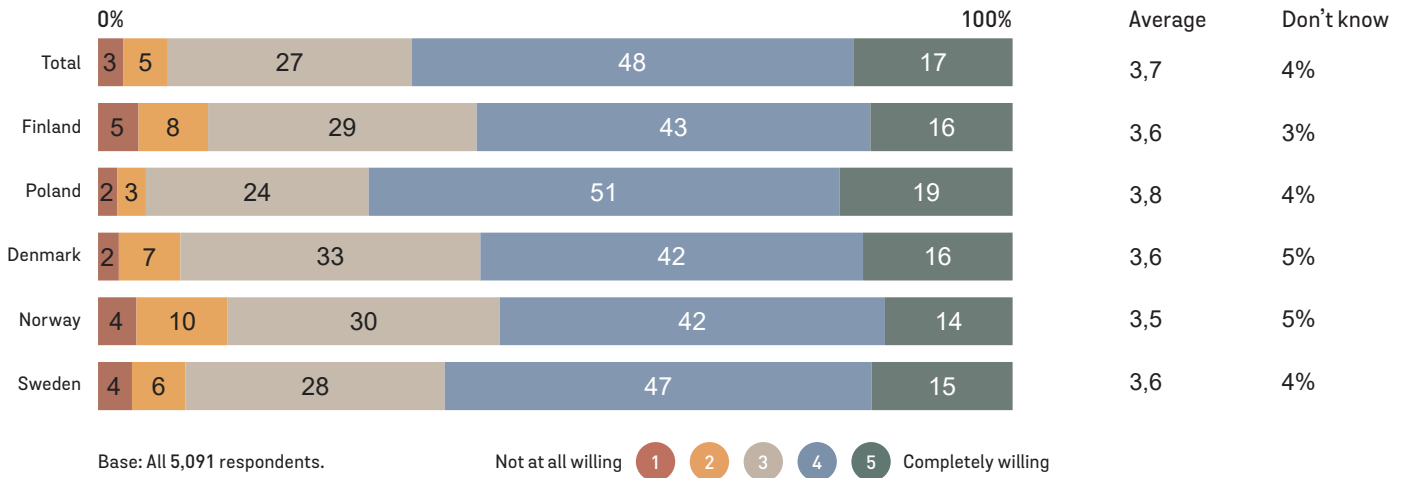
Among all those surveyed that believe it's important manufacturers use recycled materials, 43% have rejected products or brands they consider are failing to meet their expectations for sustainability, in recent years.



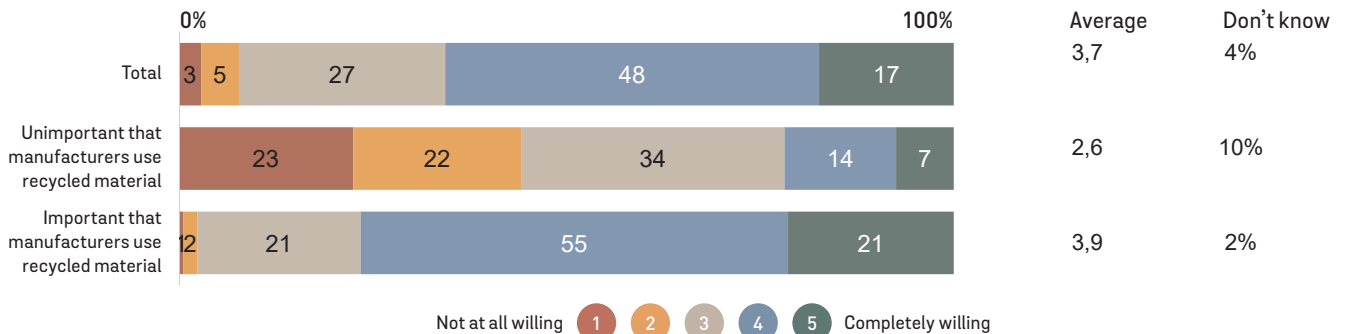
Base: Of all the respondents that considered it unimportant that manufacturers use recycled materials, n=461. Of those that consider it important, n=3463.

TO WHAT EXTENT ARE YOU WILLING TO ALTER YOUR CONSUMPTION OF PRODUCTS IN ORDER TO CONTRIBUTE TO REDUCING CLIMATE IMPACT?

65% of all those surveyed, aged 18 to 65, were willing to fully, or partially, alter their consumption of products in order to contribute to reducing climate impact.



In the group that considered the use of recycled material to be unimportant, 45% were unwilling to alter their consumption of products in order to contribute to reduced climate impact, compared with only 3% in the group that think the use of recycled materials is important.

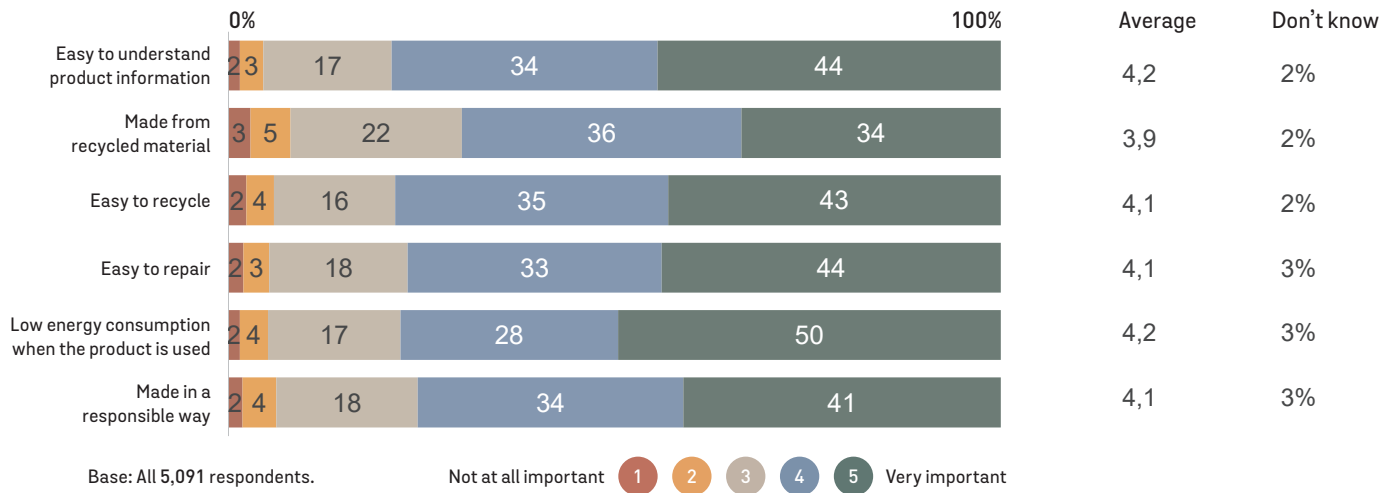


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WHEN CONSIDERING THE SUSTAINABILITY OF PRODUCTS, HOW IMPORTANT ARE THE FOLLOWING?

The most important aspects by which consumers assess sustainability are:

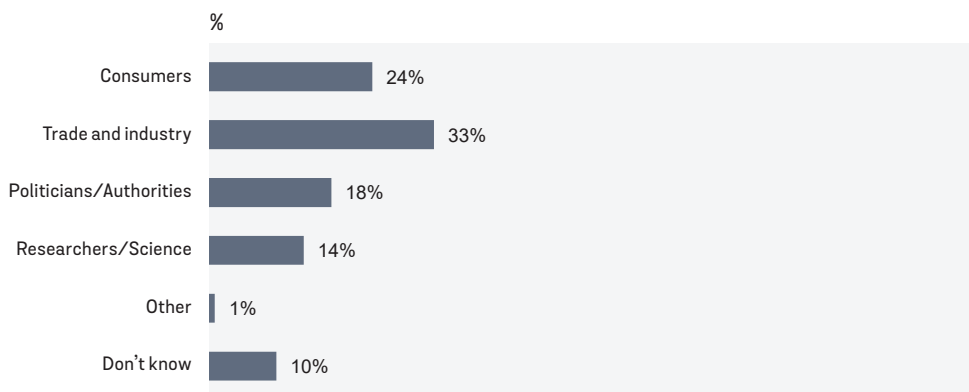
1. Low energy consumption when the product is used (50% - very important)
2. Easy to understand product information (44% - very important)
3. Easy to repair (44% - very important)
4. Easy to recycle (43% - very important)



	Total	Finland	Poland	Denmark	Norway	Sweden
Easy to understand product information	4,2	4,1	4,3	3,9	3,8	4,0
Made from recycled material	3,9	3,7	4,0	3,7	3,7	3,8
Easy to recycle	4,1	4,2	4,2	3,9	4,0	4,1
Easy to repair	4,1	4,0	4,3	3,8	3,9	3,9
Low energy consumption when the product is used	4,2	4,0	4,4	3,9	3,8	4,0
Made in a responsible way	4,1	4,0	4,1	4,0	4,0	4,1

WHO DO YOU THINK HAS THE MOST IMPORTANT ROLE IN ADVANCING THE USE OF RECYCLED MATERIAL IN PRODUCTS?

Who consumers think have the primary responsibility for advancing the use of recycled materials in different products is (results for all countries):



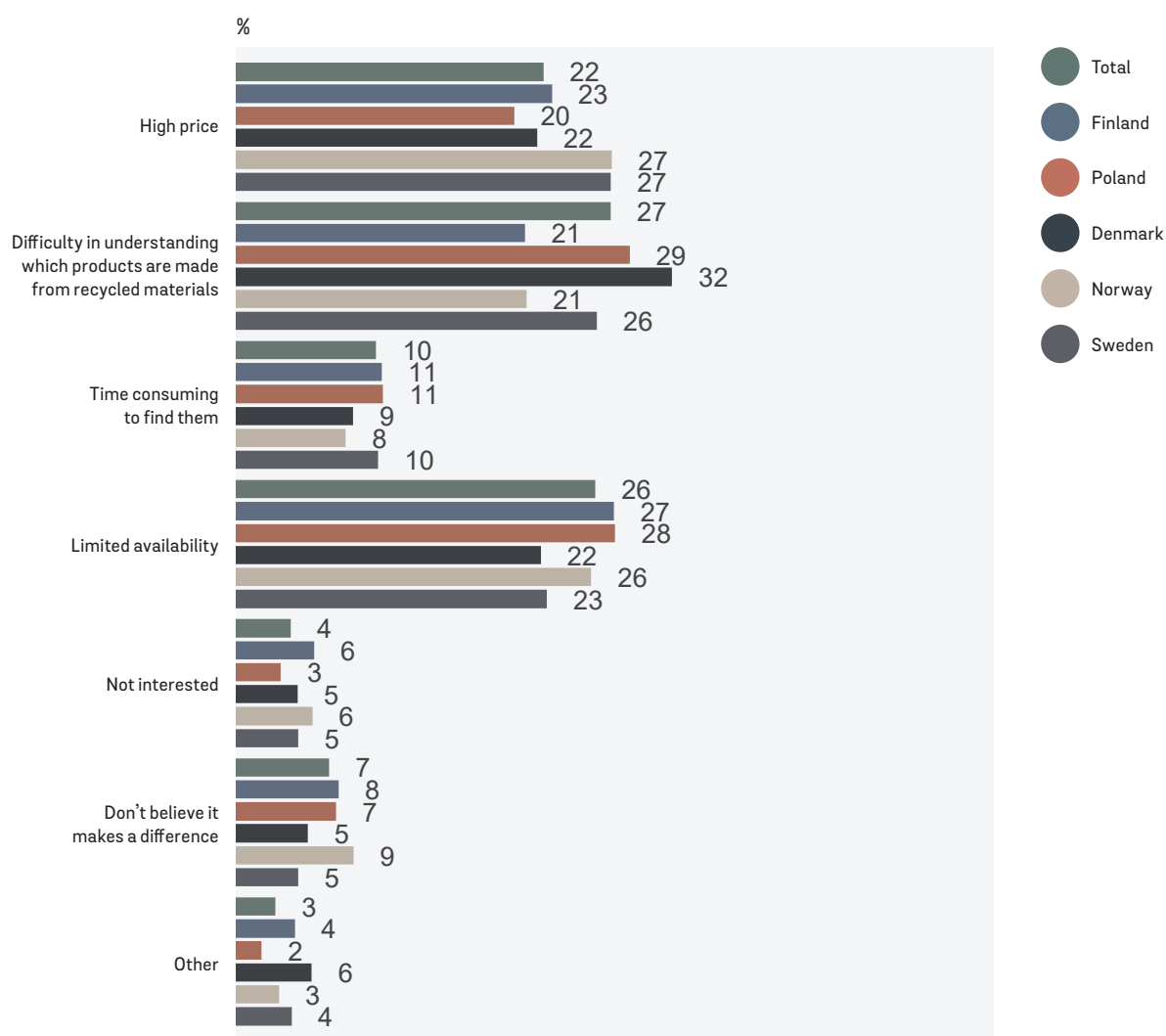
Base: All 5,091 respondents.

SUSTAINABLE BEHAVIOR – WHAT ARE THE OBSTACLES?

WHAT DO YOU CONSIDER THE PRIMARY OBSTACLES IN BUYING PRODUCTS MADE FROM RECYCLED MATERIAL?

Consumers consider the greatest obstacles in buying products made from recycled materials to be:

1. Difficulty in understanding which products are made from recycled materials (27%)
2. Limited availability (26%)
3. High price (22%)



Base: All 5,091 respondents.

INFORMATION ABOUT THE RESPONDENTS

Below, is a summary of information about the 5,091 people who took part in the survey.

Are you...?	Amount	Percentage
Man	2519	49%
Woman	2572	51%

Age	Amount	Percentage
18-29 year	1345	26%
30-39 year	1350	27%
40-49 year	1209	24%
50-65 year	1187	23%

Country	Amount	Percentage
Sweden	1024	20%
Norway	1017	20%
Denmark	1013	20%
Poland	1013	20%
Finland	1024	20%

What is the highest level of education you completed?	Amount	Percentage
Elementary school	478	9%
Senior high school	2234	44%
Higher education	2299	45%
Don't know	80	2%

What is your personal income, before tax, per month?	Amount	Percentage
0-1499 EUR	1134	22%
1500 - 2 499 EUR	1162	23%
2 500- 4 499 EUR	1551	30%
4 500 EUR or higher	674	13%
Do not want to disclose/don't know	570	11%

OBJECTIVES AND IMPLEMENTATION

Stena Recycling conducts many initiatives concerning sustainability and recycling issues. Creating a more sustainable society requires changes in attitude and behavior among both consumers and companies. Origo Group, on behalf of Stena Recycling, has compiled this survey of consumer attitudes to sustainability, circular materials and recycling in five markets.

The survey was commissioned in order to understand which measures will have the greatest effect on consumer attitudes to circular materials and to compare how opinion differs in different markets and demographic groups.

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IMPLEMENTATION

This survey was conducted in January 2022 by Origo Group, www.origogroup.com. The data was collected from web panels. The target group included consumers, between the ages of 18 and 65, in Sweden, Norway, Denmark, Finland and Poland. 1,024 responded to the survey in Sweden, 1,017 in Norway, 1,013 in Denmark, 1,013 in Poland and 1,024 in Finland. The results are divided into demographic variables, age, gender and country, in order to obtain nationally representative results.

Origo Group has its own web panel, the Origo Group panel, which currently consists of approximately 20,000 active members and continues to grow throughout Sweden. New participants are continually recruited from the general public in Sweden. Recruitment is conducted by telephone interview, in connection with representative surveys of the public. Members can choose when and how often they respond to surveys, although they cannot participate for at least ten days after taking part in a survey.

In this survey, Origo Group's own panel was used, as well as panels that are part of the Cint Opinion Hub platform, in order to reach all the countries required for the survey. In Sweden, there are approximately 536,000 members, in over 50 panels, in the Cint Opinion Hub, of which the Origo Group panel is one. All these panels follow ESOMAR's recommendations for online market research.

The target groups in this survey have been defined using available background variables about the participants. This has meant that we have been able to collect data before starting to set quotas on the number of responses within the target groups. As we have used quotas, the distribution of respondents in sub-target groups is representative of the distribution among the population, in terms of gender, age and the country in which participants live.

The survey was conducted in January 2022, with each interview lasting 5 minutes.

The total number of respondents in the survey amounted to 5,091.

The responses have been broken down by market. There were 1,024 respondents in Sweden, 1,017 in Norway,

1,013 in Denmark, 1,013 in Poland and 1,024 in Finland. The results are reported in total and by country.

What consumers say about their expectations of manufacturers and retailers for sustainable products:

“Don’t be cowardly. Stop selling products that damage the climate.”

“Talk with your customers more.”

“Think long-term about product design.”

“Think sustainably at every stage.”

“Improve product labelling and make your marketing clearer.”

“Make things 100% circular, not just 20 or 50%.”



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