



Llywodraeth Cymru  
Welsh Government

RESEARCH, DOCUMENT

# Impact of the Deposit Return Scheme on alcohol purchasing behaviours: summary

Outputs from a mixed methods research study that was carried out to explore the impact of the Deposit Return Scheme on alcohol purchasing behaviours.

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## Research aims and methodology

The Welsh Government has the ambition for Wales to become a zero-waste nation by 2050, meaning that any discarded materials are recycled and recirculated within the Welsh economy. A Deposit Return Scheme (DRS) has been identified as an important way to achieve this ambition. The Deposit Return Schemes is specifically designed to increase the collection and recycling of drinks containers, ultimately helping to reduce littering of this commonly littered packaging type. While it is important for the Welsh Government to introduce DRS as a means to achieving its zero-waste target, in doing so it also needs to consider the wider impact this might have.

The Welsh Government therefore identified a need to understand if there was a risk that the price changes at the point of purchase with the introduction of DRS could counteract the aims of its ongoing Minimum Price for Alcohol (MPA) legislation, which sets a Minimum Unit Price (MUP) at which alcohol can be purchased. The potential risk identified was that the resulting point of purchase price changes, applied per drinks container, may make single pack high strength products be seen as more attractive from a price point perspective than multipacks of lower alcohol products at the time of purchasing.

## Research objectives

The core aim of the research was to explore the possible impact of the DRS on alcohol purchasing behaviours in Wales and how the introduction of DRS may impact on the aims of the Minimum Price for Alcohol policy.

Two groups that were identified as potentially being most at risk to changing alcohol purchasing behaviours were hazardous and harmful drinkers and people on lower incomes. Thus there was a need to specifically understand potential

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behaviours in these groups.

## Research methodology

A mixed methods approach (qualitative and quantitative research) was undertaken, preceded by a literature review. The purpose of the qualitative research was to understand how, and why, choices are made in relation to alcohol purchasing, and how this relates to the introduction of DRS. Additionally, the qualitative research will improve understanding of why certain behaviours may occur with the introduction of a DRS, to better predict how actual behaviours are likely to play out when the policy is implemented. The purpose of the quantitative research was to test findings from the qualitative research with a larger sample drawn from the Welsh population in order to provide additional evidence to inform decision making.

For the qualitative research, 22 depth interviews were conducted with the sample structured around alcohol consumption levels (9 moderate drinkers, 7 hazardous, and 6 harmful) and affluence (high, medium and low income).

The quantitative research was undertaken via an online survey, with the sample comprising of a core sample, and a series of boosts to help enable analysis by key subgroups (e.g., drinking level and income). A summary of the base sizes is below:

**Table 1: Study sample composition**

Sample type	Profile	Number
Core	Representative sample of alcohol consumers living in Wales	1011

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Sample type	Profile	Number
Sample	(aged 18+)	
Boost 1	Hazardous drinkers (including boost)	313
Boost 2	Harmful drinkers (including boost)	200
Boost 3	Lower income hazardous or harmful drinkers (including boost)	208
Boost 4	Lower income drinkers (including boost)	559

## Main findings

### Literature review

Studies indicated that a well-designed and implemented DRS should have no impact on consumer behaviour as deposits are refundable. It was found that if consumers are able to fully engage with the scheme and easily reclaim their deposit, then unintended consequences from a DRS being implemented are less likely. In Croatia and Estonia there had been switching into larger container types within beer, but overall volume sales of beer in PET (plastic), glass and cans did not increase during the period of review.

### Current recycling behaviours

Recycling alcoholic drinks containers was found to be an ingrained routine for

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most participants in both the qualitative and quantitative research. Nine in 10 (87%) of survey participants reported recycling all their containers through kerbside recycling, with an additional 9% partially doing so. Most retail purchased alcoholic drinks were also being consumed at home (88%).

The propensity to recycle drinks containers when alcoholic drinks are consumed out of home, however, was found to be significantly lower, with fewer than half (42%) of survey participants reporting they always bring containers home to be recycled.

Younger adults (aged 18 to 34) are least likely to be recycling both at home (78%) and out of home (30%) and were also more likely to be consuming alcoholic drinks out of home than compared to older age groups.

## **Awareness and attitudes towards the DRS**

Amongst survey respondents, 37% were aware of the DRS. However there were some notable differences between sub-groups. Those aged under 35 were least likely to be aware of the scheme (27%, compared to 46% of over 55s), while harmful drinkers were also slightly more likely to be aware of the DRS (42%, compared to 36% of moderate drinkers).

The most frequent spontaneous reasons given for feeling positive about the DRS were that it would encourage recycling (47%), help the environment generally (14%), and stop littering (14%). Ultimately, 'to get my deposit back' was the main reason why respondents said they would return containers (the key driver for engagement).

Of those who felt neutral or negative towards the DRS, the top reasons given were that they already recycle containers (22%), it would be a hassle (17%), the added cost at the point of purchase (13%), and a preference for cash over vouchers when returning containers (8%).

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## Evidence of how the DRS will potentially impact behaviours

The research suggests a minority of consumers who are buying beer or cider may switch into higher strength alcohol types (partially or fully) with the introduction of a DRS, with fewer than 10% of beer or cider drinkers in the quantitative research indicating they would do so. This was also true for hazardous or harmful drinkers and those on lower incomes at a total level (no significant differences). However, for harmful or hazardous drinkers who were also on a lower income the proportion was higher at the 30p level compared to moderate drinkers (any income) e.g. for cider 14% versus 7% respectively (statistically significant). At 30p cider drinkers aged 18 to 34 in the survey were also more likely to think they would switch to a higher strength single format alcohol type instead of cider (fully or partially), 14% of 18 to 34-year-olds versus 7% of 35 to 54-year-olds (a statistically significant difference). As also were female cider drinkers compared to male cider drinkers in the sample (14% compared to 4%, a statistically significant difference).

The research identified a number of key reasons why only a minority of consumers who are buying beer or cider may switch into higher strength alcohol types (partially or fully) with the introduction of a DRS:

- Around four in five (82%) of the survey respondents had a preferred type of alcoholic drink that they drink more than others, meaning that switching to an alternative type with the introduction of the DRS would require an additional change in habits. The qualitative research also highlighted a strong emotional attachment to preferred drink types. The preference towards one drink type was higher amongst hazardous and harmful drinkers than moderate (85% and 87%, respectively, versus 79%). For hazardous and harmful drinkers who drink beer at least 3 to 4 times a week, this preference increased to 90%.

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- Types of alcoholic drinks are associated with certain occasions (e.g. drinking beer watching a football match or drinking wine with a meal). Switching alcohol types for strongly associated occasions would again require a change from existing norms.
- When shopping for alcohol, current behaviour tends to be to shop within rather than across alcohol types.

Supporting this, the literature review found that despite the number of operational DRSs around the world, there was no evidence of significant unintended effects on alcohol consumption.

The research highlighted, however, that 18 to 34-year-olds currently had the lowest propensity to recycle and also had the lowest intention to return containers via the DRS. This was particularly the case when retail purchased alcohol was being consumed out of home. If deposits are not being reclaimed there is a greater potential risk within this age group of switching from lower alcohol multipack alcohol types to stronger drinks.

## **Recommendations regarding actions that could be taken to facilitate the returning of containers**

Hazardous drinkers and harmful drinkers expressed a concern that people might judge them based on the volume of drinks containers returned (35% and 43%, respectively). Machines that enable discreet deposits may encourage this group to return.

In terms of collecting deposits on return, there was a preference for cash rather than vouchers (cash in terms of physical cash or back on to a card), in part due to a concern about vouchers being lost, having an expiry etc. Digital vouchers may help some feel more confident that money would not be lost.

Adults with children and those aged 18 to 34 years old, viewed having limited



time to return as a distinct barrier. When asked directly, half (51%) of 18 to 34-year-olds reported having a lack of time would make it difficult to fit returning containers into their everyday life, as did 44% of parents of children aged under 18.

Communications around the ease and speed of returning containers, coupled with widespread return points (so people do not feel they need to go out of their way) may lessen this concern. Ensuring that return points are operational will also be important.

There was a clear association between having a negative view of the DRS and having unanswered questions about the scheme. Of those whose initial reaction to the scheme was negative, 60% had questions about how it would work or thought it was confusing, compared to 36% of those with a positive view. This suggests clear and comprehensive communications will be important in encouraging drinkers to feel positive about the scheme, and hence more likely to participate.

The number and location of return points was a top concern amongst participants in both the qualitative and quantitative research, highlighting the importance of return point location in facilitating returns. Having a high penetration of operational return points in out of home locations where drinkers consume retail purchased alcohol is particularly important, as currently recycling rates are significantly lower out of home. The need to carry around empty messy drinks containers out of home was also highlighted as the main barrier to returning containers (31%).

## Recommendations for further research

It is recommended that actual behaviours are monitored following implementation. Undertaking this around a year after introduction would allow

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consumers time to adjust to the new scheme and for sufficient category data to be collected to undertake any meaningful analysis. The recommended approach is to use a mixture of category data (Epos or shopper panel sales data) and additional consumer quantitative and qualitative research.

For the qualitative and quantitative research a similar sample structure is suggested (as for this research), but with the possible inclusion of an additional boost of 18 to 34-year-olds, as this group was identified as potentially having the lowest intention to engage with the DRS.

To supplement the research with consumers, qualitative research could also be considered with scheme operators (e.g. retailers), to identify if there are any issues in implementation from their point of view.

## Contact details

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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