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Research to explore the impact of the Deposit Return Scheme on alcohol purchasing behaviours

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Research to explore the impact of the Deposit Return Scheme on alcohol purchasing behaviours

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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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Glossary

Glossary text

Acronym/Key word: Definition

- DRS: Deposit Return Scheme
- WTP: Willingness To Pay
- Out of Home: Retail purchased alcohol consumed outside of a home environment e.g. parks, beaches, street, on the train
- Harmful Drinker: Typically drinking over 35 units of alcohol per week for women and over 50 units for men
- Hazardous Drinker: Typically drinking more than 14 units of alcohol a week, but less than 35 units a week for women. Drinking more than 14 units of alcohol a week, but less than 50 units a week for men
- Moderate Drinker: Typically consumes less than 14 units of alcohol per week
- NSW: National Survey of Wales
- MUP: Minimum Unit Pricing
- Groupthink: Where the desire for harmony or conformity leads research participants to express a consensus of opinion, and suppressing alternative opinions
- Expert Participant: Where a participant in a focus group is significantly more knowledgeable on the topic than others in the group. Thus potentially influencing others before their prior level of awareness is explored
- ABV: ABV is a measure of the amount of pure alcohol as a percentage of the total volume of liquid in a drink

1. Introduction/Background

- 1.1 The Welsh Government has the ambition for Wales to become a zero-waste nation by 2050, meaning that any discarded materials are recycled and re-circulated within the Welsh economy. This is set out in the strategy document '[Beyond Recycling – A strategy to make the circular economy in Wales a reality](#)'¹. To support this ambition, Beyond Recycling has set out several objectives to reduce littering, to increase the range of plastic materials that can be collected for recycling and develop more recycling infrastructure in Wales to reprocess it. The Deposit Return Scheme is specifically designed to increase the collection and recycling of drinks containers, ultimately helping to reduce littering of this commonly littered packaging type. Evidence from other countries has shown that as well as improvements in recycling, the introduction of a DRS has resulted in a significant decrease in the amount of littered drink containers, with reductions ranging from 60% to 80%.
- 1.2 A Deposit Return Scheme (DRS) has been identified as an important way to achieve this ambition as current recycling rates for DRS in-scope containers are around 70%, but countries with a well-functioning DRS scheme are experiencing recycling rates of 90% or higher. If Wales can achieve similar or higher levels of recycling rates through a DRS, it will go a long way to helping it achieve its ambition. The Welsh Government has committed to work with the UK Government and devolved governments in Scotland and Northern Ireland in developing a DRS, which is currently planned to be introduced in Wales 2027. At the time of writing this report the most recent government update on the development of the Deposit Return Scheme was published in April 2024: [Written Statement: Update on the Development of a Deposit Return Scheme \(25 April 2024\) | GOV.WALES](#).² However, the final design of the scheme is subject to change. Although the UK Government, Welsh Government and devolved governments in Scotland and

¹ [Beyond Recycling – A strategy to make the circular economy in Wales a reality. Welsh Government.](#)

² Since this report was completed, a decision has been taken that Wales will no longer participate in the four nations Deposit Return Scheme for drinks containers. For further detail see [Written Statement: The Development of a Deposit Return Scheme for Wales \(18 November 2024\) | GOV.WALES](#). The research presented in this report, based on the model of DRS outlined here, remains relevant given the Welsh Government's commitment to bringing forward a DRS.

Northern Ireland are working together to introduce the Deposit Return Scheme, there may be some differences between nations, such as the inclusion of glass containers in Wales (where other nations may not include this material).

- 1.3 In Wales, it is proposed the DRS will add a refundable flat fee on all in-scope drink containers - PET plastic, steel, glass and aluminium containers (for soft drinks and alcoholic drinks) - which will be able to be returned at a large network of return points. The flat fee will be applied uniformly to all drinks' containers, irrespective of the volume and alcoholic strength of the drink contained within them. This means for example that a 10 pack of lager (10 cans) would have the fee applied 10 times, but a bottle of wine with a higher alcohol by volume (ABV) would only have the fee applied once. The deposit amount has yet to be determined but assuming a DRS of 20p per container was introduced, this would increase the amount paid at the point of purchase for a £11.00 pack of lager (10 cans) to £13.00, an increase of 27% for the consumer, whereas a bottle of wine at £8.00 would jump to £8.20, an increase of only 2.5%.
- 1.4 It is important for the Welsh Government to introduce a DRS as a means to achieving its zero-waste target, but in doing so it also needs to consider the wider impact this might have. Specifically, the Welsh Government want to understand whether and to what extent there is a risk that the price changes at the point of purchase could counteract the aims of its ongoing Minimum Price for Alcohol policy, as set out in the [Public Health \(Minimum Price for Alcohol\) \(Wales\) Act 2018](#)³, which sets a Minimum Unit Price (MUP) at which alcohol can be purchased. The MUP policy was introduced to help protect the health of hazardous and harmful drinkers (who tend to consume greater quantities of low cost, high alcohol content products). MUP works by using a formula to calculate the minimum price at which alcohol, which is made up of the MUP (50p), the percentage strength of the alcohol, and its volume. The potential risk identified was that the resulting point of purchase price changes with the introduction of DRS, may make single pack high strength products be seen as more attractive from a price point perspective than multipacks of lower

³ [Public Health \(Minimum Price for Alcohol\) \(Wales\) Act 2018. legislation.gov.uk](#)

alcohol products at the time of purchasing, therefore reducing any potential impact of MUP. Such risks have been highlighted by, for example, Alcohol Change UK⁴ in its consultation response to a DRS in 2021. The research is timely given the sunset clause built into the 2018 Act requiring the Welsh Government to review the implementation of the legislation and for the Senedd to agree on its extension beyond March 2026.

Objectives of the research

- 1.5 The core aim of the research was to explore the possible impact of the Deposit Return Scheme (DRS) on alcohol purchasing behaviours in Wales, and any changes that may occur as a result. In addition, the research set out to assess how the introduction of DRS may impact on the aims of the Minimum Unit Pricing for Alcohol Act (MUP).
- 1.6 Two groups that were identified as potentially being most at risk to changing alcohol purchasing behaviours as a result of DRS were hazardous and harmful drinkers, and those on lower incomes. Thus, there is a specific need to understand how the behaviour of these groups would be affected (if it all).
- 1.7 Fundamentally, the impact of DRS on alcohol purchasing behaviours is likely to be influenced by the extent to which consumers actively engage with the scheme as intended. Returning containers and thus getting deposits back will require an active change in behaviour from current kerbside recycling schemes. Thus, an additional objective was to understand potential barriers, as well as motivations, to engage with DRS in the context of alcohol containers specifically, including deposit levels.

⁴ [Alcohol Change UK DRS Consultation Response. Alcohol Change UK.](#)

2. Methodology

2.1 To answer these objectives, we undertook a mixed methods approach (qualitative and quantitative research), preceded by a brief narrative review to inform the research. This focused on learnings from other studies on the effectiveness of DRSs and the experience of other countries that already have a DRS in place. The literature review is contained in a separate chapter within this report in Chapter 3, whilst findings from the qualitative and quantitative research are integrated throughout the rest of the report.

Qualitative research

2.2 The core purpose of the qualitative component of the research was to understand how, and why, choices are made in relation to alcohol purchasing, and how this relates to the introduction of a DRS. Additionally, it is important to understand why certain behaviours may occur with the introduction of a DRS to better predict how actual behaviours are likely to play out and under different scenarios. The insights gained from the qualitative research were central to informing the content and language used in the quantitative research that followed.

2.3 Other important objectives of the qualitative research were:

- To provide contextual information around lived experiences when it comes to alcohol consumption and purchasing habits, and how this relates to DRS.
- To explore awareness and understanding of DRS amongst drinkers (particularly hazardous or harmful drinkers).
- To explore and understand in what ways alcohol purchasing patterns could potentially change e.g., alcohol types, pack types, consumption behaviours, and potentially other substance use.
- To understand barriers and motivations to engaging with DRS amongst different types of alcohol consumers.

2.4 Depth interviews were believed to be the most appropriate methodology for this research. Alcohol can be a sensitive topic for participants to discuss, with a core

part of the sample including hazardous or harmful drinkers, who may not have felt comfortable talking openly about their own behaviours in front of others. Depth interviews also allowed the research team to probe more deeply at an individual level around potentially sensitive areas such as shopping for low-cost, high alcohol, products or having limited budgets. As a core purpose of the qualitative research was to explore the understanding of the DRS, using depth interviews also avoided the issue of groupthink, particularly if the group contained an 'expert participant'.

Table 2.1 Sample structure depth interviews

	Household Income		
	Low	Medium	High
Moderate drinker ⁵	3	3	3
Female	1	2	2
Male	2	1	1
18-34	1	1	1
35-54	1	1	1
55+	1	1	1
Hazardous drinker ⁶	2	2	3
Female	1	1	1
Male	1	1	2
18-34	0	1	1
35-54	1	1	1
55+	1	0	1
Harmful drinker ⁷	2	2	2
Female	0	1	1
Male	2	1	1
18-34	0	1	1
35-54	1	1	1
55+	1	0	0

2.5 Twenty-two depth interviews were conducted, with the sample structured around alcohol consumption levels and affluence. From experience, it was felt this number

⁵ Moderate drinker typically consumes less than 14 units of alcohol per week

⁶ Hazardous drinker typically drinking more than 14 units of alcohol a week, but less than 35 units a week for women. Drinking more than 14 units of alcohol a week, but less than 50 units a week for men

⁷ Harmful drinker typically drinking over 35 units of alcohol per week for women and over 50 units for men

would enable the key themes to be identified and would prevent theoretical saturation (no new information emerging with additional interviews). Due to the specific objective to understand potential behaviours amongst hazardous and harmful drinkers (the key target for the MPA legislation) 13 out of the 22 interviews were with harmful or hazardous drinkers (others were moderate) and seven with lower income consumers.

- 2.6 Participants for the depth interviews were recruited on a free-find basis using a specialist recruiter in Wales called Fieldmouse. Participants were selected only after matching the required criteria via a telephone screener with respondents allocated based on answers given within the screening questionnaire. In addition to the core sample, additional criteria were types of alcohol consumed, retailer types used to buy alcohol, and the type of area respondents lived (rural 8, semi-rural 5, suburban/semi-rural 2, suburban 3, urban 4). These were included to ensure that a range of experiences were represented. Segments contained a mix of genders, albeit a slightly higher number of men than women were included within the hazardous and harmful segment as National Survey of Wales⁸ data reports a higher proportion of men fall into these categories than women. The sample also included an equal representation of age groups.
- 2.7 Fieldwork was conducted between Thursday 11 to Monday 22 April 2024, with each interview lasting around an hour. For confidentiality purposes interviews were recorded and then deleted once transcribed. It was hoped that this added anonymity would also encourage participants to speak more openly about their experience.
- 2.8 To enable engagement with the research, we offered participants the option of online or face to face interviews, based on their individual needs and circumstances. Participants were also given the choice for their interview to be conducted in Welsh or English. Although this choice was offered, all depth interviews were conducted online and in English, with no participant opting for a face-to-face interview or for it to be conducted in Welsh.

⁸ Source: [National Survey of Wales. Welsh Government.](#)

2.9 Following fieldwork, the depth interviews were analysed using thematic analysis, to draw out key themes in relation to the objectives. Themes were also explored in the context of the COM-B model. The COM-B model is a behavioural change model that theorises that to undertake a particular behaviour people need have the capability, opportunity and motivation to do the behaviour⁹. Key findings from the depth interviews were presented to the Welsh Government before progressing to the quantitative stage of the research.

Quantitative Research Methodology

2.10 Whilst qualitative research is useful for identifying themes, it is less reliable in prescribing how pervasive these themes are (whether attitudes, behaviours, awareness or understanding) within the population of interest. In making policy decisions on the basis on the insights provided in this research, it was felt that quantitative research was needed to reduce uncertainty.

2.11 Its purpose was also to address specific behavioural objectives, as outlined in the brief from the Welsh Government, which it was felt could not reliably be met through qualitative research. These are listed below:

- Explore whether, and to what extent, different deposit levels would likely impact alcohol purchasing behaviour.
- Explore the potential impact of a DRS on purchasing of multipack lower alcohol content drinks, and specifically whether, and to what extent, it might incentivise people to switch purchasing behaviour to stronger alcohol content drinks in single pack formats.
- Explore whether there are any variations in behaviour between different groups of drinkers and different income levels (with a specific focus on hazardous and harmful drinkers and those on lower incomes).

2.12 To evaluate these, it was necessary to understand how consumers will trade off different features at the point of purchase where these different attributes could

⁹ For further details: [The behaviour change wheel: A new method for characterising and designing behaviour change interventions | Implementation Science | Full Text \(biomedcentral.com\)](#)

include, deposit levels, pack type (multipack, single pack, pack size) and alcohol type or strength. To undertake this at a qualitative level with all the different permutations involved was felt to be inefficient, and sample sizes would be insufficient for the results to be reliable.

2.13 At the outset of the project the intention was to use conjoint analysis within the quantitative research. Conjoint analysis is a statistical technique used in market research to understand how consumers value different features or attributes of a product or service. It involves breaking down a product or service into its individual attributes (e.g., price, alcohol content, alcohol type, pack type) and then presenting various combinations of these attributes to consumers. However, the findings from the qualitative research suggested that this was not going to be the best approach given reported alcohol purchasing behaviours. This was because:

- When shopping, participants reported generally not choosing between types of alcohol, but within types. Thus, to force a choice between types will not necessarily represent real life circumstances. This is important because if we are forcing participants to make choices that do not represent how they shop, any conclusions on potential behaviours may not be valid.
- Most participants were routinely only drinking two types of alcohol and often one only (their preferred type). To force a choice between different alcohol types may not be valid.
- Participants tended to have preferred formats (routinely buying the same each time). This means to be a valid study these needed to be represented in the conjoint experiment. The more levels included by attribute the greater the sample size will need to be to be robust. This would make it more challenging when trying to model any potential behavioural changes amongst different drinker types or affluence levels.

2.14 In a choice-based experiment, the number of options shown to participants in each scenario needs to be limited to be manageable. It would be challenging to set up so that participants are choosing both across, and within, alcohol types in a single scenario.

- 2.15 It was therefore decided that testing intended behaviour would be more appropriate, with respondents being asked the following in a 20p and 30p scenario (separately).¹⁰ The order in which scenarios were tested was randomised to avoid order bias.
- For each alcohol type they purchased, would they continue to buy it?
 - If so, would they continue to buy the pack types they currently buy or switch to an alternative?
 - What pack types would they switch to?
 - Would they continue to buy the same volume of the alcohol type?
 - For those who would buy less or would stop buying, what types of alcohol would they switch to instead? And why.
- 2.16 An online quantitative survey methodology was used. The survey was hosted on a platform called CMIX operated by Dynata. Participants were given the choice to undertake the survey in Welsh or English and it was compatible for all device types. While digital exclusion now stands at only 6%, for 21% of adults¹¹ access to the internet is exclusively via a smartphone. Thus, the ability to offer the survey on all device types including smartphone helped to ensure that potential participants are not excluded on this basis.
- 2.17 The sample was obtained from a mixture of National Survey of Wales (NSW) recontact sample and panel data. Research panels are typically operated by commercial organisations. Participants volunteer to join panels to take part in market research in return for some small monetary contribution for their time. It was originally assumed that half of the sample would be obtained from the recontact sample and half from panel data. However due to the relatively low number of recontacts available with valid email addresses, the actual split was 4% NSW recontact sample and 96% panel data. Due to available panel sizes for Wales, it was necessary to use more than one panel to achieve the required number of responses. Thus Obsurvant, a panel partner, sourced the required number of

¹⁰ Questions 33 to 63 [in the quantitative questionnaire Appendix B

¹¹ [Ofcom Digital Exclusion Report 2022. Ofcom.](#)

respondents from across the UK’s panel providers (and to ensure there was no duplication of respondents). NSW recontacts were sent an email containing a link to the survey, and received one follow up email to thank those who had already participated in the survey and to remind those who hadn’t.

2.18 The sample strategy was to obtain a core data set of alcohol consumers in Wales, with boosts for segments where the objectives required a specific read on intended behaviour, drinking level and affluence. This was to ensure that sample sizes for these segments were large enough to draw conclusions.

Table 2.2. Base sizes for core sample and boosts

	Profile	Number
Core Sample	Representative sample of alcohol consumers living in Wales (aged 18+)	1011
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

2.19 In collecting the core sample, it was noted the number of harmful and hazardous drinkers within the sample was higher than reported in the most recent NSW data. In this sample the proportions were moderate 62%, hazardous 25%, and harmful 13%. In the NSW data (excluding those who don’t drink), the proportions were 79%, 17% and 3% respectively. In part the researchers felt that this could be because with an online survey it feels more anonymous. Whereas with a telephone or face to face data collection technique, participants may be more reluctant to admit to actual drinking levels when speaking directly to an interviewer. Also, in the DRS survey strong beer and higher ABV cider types (premium/vintage or high strength cider) were split out from ‘standard’ beer and cider, enabling a full assessment of units consumed within beer and cider. Spirits, Ready to Drink pre-mixed spirits or cocktails (RTDs), and liqueurs were also split out separately in this research when asking about drinking frequency and amounts. A 2020 report by The Institute of

Alcohol Studies and Public Health England¹² argues that official data could be underestimating actual drinking levels (recording only 55% to 60% of actual levels).

2.20 Drinking level was defined by a multi-stage process, following the methodology used by the [NSW](#)¹³. Questions were included in the questionnaire to determine:

- Frequency of drinking alcohol overall
- Frequency of drinking each type of alcohol consumed
- Amounts typically consumed each time alcohol type in consumed.

Units were then calculated using alcohol units contained within amounts typically consumed e.g. each time to give an estimate of weekly consumption (e.g., 2 large glasses of wine, 2 x 3 units = 6 units) and the frequency multiplier below:

Table 2.3 Drinking frequency multiplier for units calculation

Drinking Frequency	Multiplying Factor
Almost everyday	7
5 or 6 times a week	5.5
3 or 4 times a week	3.5
Once or twice a week	1.5
Once or twice a month	0.375
Once every couple of months	0.115
Once or twice a year	0.029

2.21 For the core sample, the aim was to achieve a representative sample of drinkers in terms of core demographics (i.e., age and gender). Other segments were left to fall out naturally.

¹² [Measure for measure: calculating alcohol consumption - Institute of Alcohol Studies \(ias.org.uk\)](#)

¹³ [National Survey for Wales: questionnaires | GOV.WALES](#)

Table 2.4 Gender and age split within each segment¹⁴

	Core sample	Harmful (including boost)	Hazardous (including boost)	Moderate	Low income (including boost)	Low income & hazardous or harmful drinker (including boost)	Hazardous or harmful (including boost)
Sample Size	1011	200	313	623	559	208	513
Gender							
Male	50%	56%	59%	43%	41%	49%	58%
Female	49%	45%	41%	56%	58%	51%	42%
Other identity	0%	0%	0%	1%	0%	0%	0%
Age							
18-34	27%	35%	32%	24%	30%	37%	33%
35-54	31%	42%	34%	30%	35%	37%	37%
55+	42%	23%	34%	46%	35%	26%	30%

2.22 Quantitative data was analysed alongside the initial findings from the qualitative research. Findings have been provided at a total level and for subgroups where statistically significant differences were observed at the 95% confidence level (where the p value < .05). A pairwise test¹⁵ was used to assess differences between subgroups. For example for hazardous or harmful drinkers and people on lower incomes and by any core demographics.

2.23 Quantitative data has been presented in terms of the core sample and relevant subgroups. When reported the core sample does not contain any boost data and is reflective of all drinkers. This is also the case for core demographics of gender and age, where data is based on the core sample only. Only for the following subgroups (where it was necessary to gain some extra boost responses to provide a greater sample size) are boosts included; harmful drinkers, hazardous drinkers, harmful or

¹⁴ Total may not equal 100% due to rounding

¹⁵ Pairwise significance testing is a statistical method used to compare the means of different groups to determine if there are significant differences between them

hazardous drinkers, low income drinkers and low income hazardous or harmful drinkers.

3. Literature review

- 3.1 Deposit Return Schemes are designed to collect high quantities of beverage containers for reuse and high-quality recycling. These systems see customers pay a small deposit when they purchase a can or bottle, which they get back when they return the container to a collection point for recycling.
- 3.2 There has been extensive research into Deposit Return Schemes (DRS) which have been undertaken by a mixture of non-profit organisations, specialist consultancies and academics that tend to have an interest in sustainability issues. Many of the reports are focussed on the effectiveness of different types of schemes in increasing the collection of beverage containers for reuse or high-quality recycling, the impact on overall beverage sales and consumer participation rates. There are very few studies that actually monitor unintended consequences from such schemes being implemented, and in particular the impact on alcohol consumption.
- 3.3 There have been many schemes launched across the globe during the last few years. Since 2018, Malta (2022), Western Australia (2020), Victoria (2023), Turkey (2023), Romania (2023), Slovakia (2022), Latvia (2022), Jamaica (2021), Hungary (2024) and Ireland (2024) have implemented a DRS. Further launches are planned in Singapore, New Zealand, Portugal, Luxembourg and Austria. A recent report by Reloop¹⁶ has highlighted strong public support for DRS systems across many different countries between 2003-2023. In Wales, a report commissioned by Welsh Government¹⁷ highlighted that nearly three quarters of adult survey participants supported the idea of a DRS.
- 3.4 Figure 3.1 shows comparison of key features of DRS schemes in operation across Europe. Most have a relatively high return rate (the amount of beverage container material that is collected by weight or unit, expressed as a percentage of the amount of beverage container material placed on the market, excluding exports) of

¹⁶ [Public support for deposit return systems. Reloop](#)

¹⁷ [Wales Report: Consumer research to inform the design of an effective deposit return scheme. Fitzpatrick, A., Jouahri, S., McGee, A. and Roberts, N., Kantar](#)

around 90%. The only exception is The Netherlands which expanded its scheme to include small bottles in 2021 to increase their rate of return. Most use a fixed refund value, and they cover plastic, metal and glass containers with consumers mostly returning packaging to retailers.

Table 3.1: Deposit Return Systems (DRSs) for Single-Use Drinks Containers in Europe: Comparison of Key Features (ReLoop Global Deposit book 2022)¹⁸

Country (Population)	Containers Covered	Refund Value	Unredeemed Deposits	Redemption System	Return Rate - Total
Croatia (4.1m)	Plastic, metal, glass	Fixed: 0.50 HRK	System Operator	Return-to-retail	91% (2020)
Denmark (5.8m)	Plastic, metal, glass	Variable	System Operator	Return-to-retail	93% (2021)
Estonia (1.3m)	Plastic, metal, glass	Fixed: €0.10	System Operator	Return-to-retail	89% (2020)
Finland (5.5m)	Plastic, metal, glass	Variable	System Operator	Return-to-retail	96% (2021)
Germany (83.2m)	Plastic, metal, glass	Fixed: €0.25	Producers and retailers (in the case of private labels)	Return-to-retail	98% (2021) (Estimate)
Iceland (0.4m)	Plastic, metal, glass	Fixed: 18 ISK	System Operator	Return-to-depot	91% (2021)
Latvia (1.9m)	Plastic, metal, glass	Fixed: €0.10	System Operator	Return-to-retail	N/A
Lithuania (2.8m)	Plastic, metal, glass	Fixed: €0.10	System Operator	Return-to-retail	90% (2021)
Malta (0.5m)	Plastic, metal, glass	Fixed: €0.10	System Operator	Return-to-retail	N/A
The Netherlands (17.5m)	Plastic, metal (cans)	Fixed: €0.25	Producers, Distributors/ Importers	Return-to-retail	70% (2021)
Norway (5.4m)	Plastic, metal	Variable	System Operator	Return-to-retail	92% (2021)
Sweden (10.4m)	Plastic, metal	Variable	System Operator	Return-to-retail	88% (2021)

3.5 According to ¹⁹ReLoop, European countries have better return rates than Australia and the USA which they conclude is due to a higher deposit. ²⁰Eunomia’s research into Deposit Return in the Netherlands and their assessment of the DRS proposal for beverage can collection in the public domain identified that there are four factors that combine to create the user-experience needed in a high performing scheme:

¹⁸ Deposit return systems: How they perform. RELOOP

¹⁹ [Deposit return systems: How they perform. RELOOP](#)

²⁰ [Eunomia Deposit Return in Netherlands](#)

- The value of the deposit, which determines the economic incentive to participate.
- Highly convenient return and redemption opportunities, including both the absolute number of return points, and the geographical location of return points in relationship to other everyday behaviours, as critical factors in determining user convenience.
- A consistent and straightforward system design which will facilitate public understanding and motivation to use the DRS.
- Clear communications (including campaigns, labelling, and visible infrastructure) to support the factors mentioned above.

3.6 A report by ²¹Kükenthal and colleagues suggested that the success of such schemes depends on identifying the optimal deposit fee to create an effective financial incentive without increasing the initial purchase price more than is necessary. Their Willingness to Pay (WTP) analysis identified a strong negative impact of the deposit value on WTP for all container materials, implying that consumers' recycling actions are motivated by financial incentives and the higher the deposit value, the more willing citizens will be to return their beverage containers. Socio-demographic and attitudinal factors, such as age, income, and the number of bottles purchased per week, also had an impact on WTP for certain materials. The study also found the most important barriers to the DRS are the lack of space in people's homes to store the containers and disbelief in the overall recycling system. This highlights that whilst the deposit does need to be set at the right level to encourage positive behaviour, socio-demographic and attitudinal factors could also impact consumer participation which could also further impact the unintended consequence of certain behaviours around alcohol consumption and not just price.

3.7 ²²A report from Reloop and Container Recycling Institute (CRI) concluded there was no case study that provided definitive evidence suggesting the introduction or

²¹ [Kükenthal, V.C. et al. \(2023\) 'Optimising Recycling Policy in the UK: The UK's Deposit Return Scheme'.](#)

²² [The Impact of Deposit Return Systems on Beverage Sales. Reloop.](#)

expansion of a DRS caused a decline in beverage sales and that any changes could be due to a multitude of complex factors. One of the assumptions they discuss is that a deposit value of €0.10 to €0.25 is noticeable for consumers and will lead them to reduce their consumption or alter their consumption behaviour. However, they state that this claim is misleading and overlooks a crucial factor: unlike taxes, deposits are temporary and fully refundable upon the return of the beverage container. Therefore, assuming convenient and accessible redemption, consumers have no net spending loss or gain, which means that as they adjust, it may not cause a long-term behaviour to change and therefore less unintended consequences.

3.8 As part of the ongoing Welsh Government's evaluation of the Minimum Price for Alcohol legislation, ²³an interim report using Kantar data investigated whether Welsh consumers switched from one type of alcohol to another following the introduction of a MUP, and whether they bought more or less of a certain alcohol/beverage category. The study included data for England for comparative purposes. The consumer's reaction to increased prices was impacted by their choice of drink and how loyal they are to it. Post-MUP implementation, Kantar identified two different types of behaviour. In the case of lager, the switching analysis found that people who bought lager pre-MUP, bought more of it post-MUP in both nations (Mitchell et al, 2022). The switching analysis also reported that consumers bought less cider post-MUP, with consumers switching from cider to several different types of beverages (indicating lower loyalty) including lager, spirits and fortified wine (Mitchell et al, 2022). Limitations with the data, however, meant that it was not possible to determine whether reduced purchasing was focused on the low-price, high strength brands or cider more widely. However, the former is consistent with the expected effects of MUP. This finding aligns with the decrease in household volume (litres) of cider purchased in Wales compared to England. Therefore, loyalty and preference (whether it is the favourite alcoholic beverage) are likely to impact switching within alcohol consumption.

²³ [Evaluation of the Minimum Price for Alcohol in Wales - Interim Report on Research with Retailers and Quantitative Analysis. Welsh Government.](#)

- 3.9 A 2020 ²⁴London Economics study reviewed the impact of different types of deposit fee on consumer behaviours which identified that consumers' demand for drinks can depend on how they perceive the deposit fee and their propensity to return their containers. This study used four different modelling scenarios to capture those varying demand responses. This highlighted that the demand for large single PET and small multipacks of large PET was estimated to increase post-DRS (for both flat and variable DRS) relative to the no-DRS baseline as consumers seek to limit the cost of deposit required per bottle. However, this was only evident in soft drinks and not alcohol, which is predominantly where these formats exist. The authors suggest some consideration should be given to alcohol segments that have a variety of pack formats, for example cider, as some consumers could move to a single large PET rather than individual cans which may inadvertently increase their consumption.
- 3.10 In Croatia, where these formats are common, within the lager category there is evidence of ²⁵'upsizing' since the launch of DRS, with 2 litre PET bottles having grown and to a certain extent replaced sales of 1 litre PET bottles. This has also been the case for 500ml cans vs 330ml cans. However, the overall volume sales of beer in PET, glass and cans had not increased during the period of review, indicating that consumption has not increased. Estonia has also experienced a similar scenario whereby during the initial launch of DRS, 500ml cans appeared to take share from 330ml cans. Producers later launched 568ml cans which took share from 500ml cans. Overall, 500ml+ cans ended up with a larger share of sales since the launch of DRS although 330ml can sales did recover post DRS launch indicating that the impact in Estonia had been less obvious than in Croatia.
- 3.11 In summary, there is only very limited research available focussing on the unintended consequences of DRS in terms of alcohol consumption. The fact that there is so little research, in view of the number of operational schemes around the world, suggests that the effect on alcohol consumption has not been an issue in these markets. Ultimately, studies indicate that a well-designed and implemented DRS should have no impact on consumer behaviour as deposits are refundable. If

²⁴ [Assessing the Impact of a Flat and Variable Deposit Fee for UK Deposit Return Scheme. Alupro.](#)

²⁵ [Recycling DRS in Scotland \(britglass.org.uk\)](#)

consumers are able to fully engage with the scheme and easily reclaim their deposit, then there is less likely to be unintended consequences from a DRS being implemented.

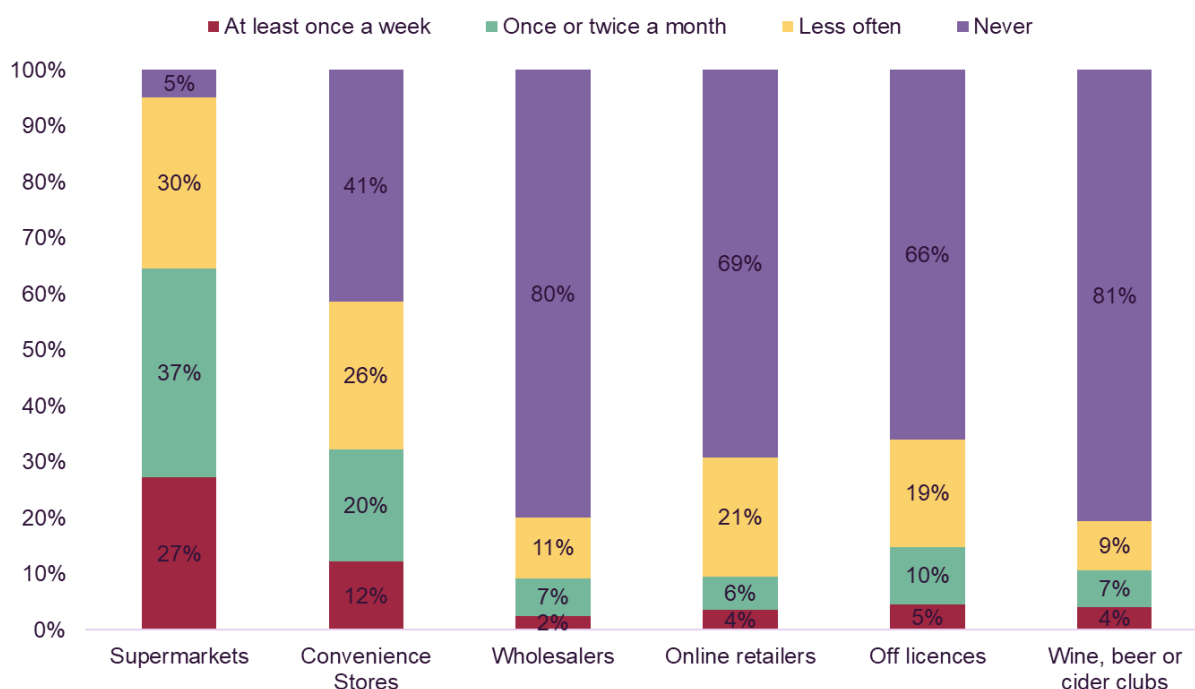
4. Overview: shopping for alcoholic drinks

The purpose of this chapter is to outline relevant current shopping behaviours for alcohol that will potentially influence what they will do with the introduction of the DRS.

Where and how alcohol is purchased

- 4.1 In the qualitative research, participants told us that they tend to shop for alcoholic drinks wherever they are shopping for groceries. Thus, supermarkets are used most frequently to buy alcohol, with 64% of survey participants buying alcohol from here at least once a month (Figure 4.1). Convenience retailers are used with the second greatest frequency but are more likely to be used for 'distress' purchases (e.g., I've forgotten to buy, or I've run out of something). In both instances, however, interviewees reported typically knowing the type of alcohol they are going to buy before entering the shop, rather than deciding when there at the shelf. Choices in store are, therefore, being made within alcohol types rather than across type. If consumers tend to choose within rather than across types in store, this suggests they will be unlikely to switch types with the introduction of a DRS, as this would involve breaking with existing behaviour.
- 4.2 Interview participants also reported routinely spending time at the fixture deciding what to buy; evaluating what is perceived as the best value purchase for them at that time. Whilst price (and particularly offers) is a key part of this decision-making process, other factors such as brand and format (bottle or can, multipack or single, size of can/bottle etc.) preferences are also a key part of this. The fact that alcohol purchases already tend to be considered, suggests that with the introduction of the DRS consumers will take time before making their choices in evaluating deposit value alongside other factors.

Figure 4.1 Frequency of shopping for alcohol by retailer type



Base: All drinkers, core sample 1011, Q19 How often have you typically purchased alcohol from the following type of retailers in the last 12 months?

4.3 As can be seen in Table 4.1, harmful and hazardous drinkers are also using supermarkets most often to buy alcoholic drinks (93% and 88%, respectively, doing so at least once a month). But they are also using other types of retail outlet more often than moderate drinkers. For example, 65% of harmful drinkers report shopping for alcohol in convenience retailers at least once a month compared to only 19% of moderate drinkers. Of significance for the DRS is that a significant proportion of harmful drinkers are buying alcohol from online retailers or clubs, which could be located outside of Wales, thus avoiding MUP. This also has potential implications if Wales includes glass in its DRS, but the rest of the UK does not.

Table 4.1 Buy alcoholic drinks in retailer type at least once a month

	All	Drinking Level			Low income	Low income & Hazardous or Harmful drinker
		Harmful	Hazardous	Moderate		
Supermarkets	65%	93%	88%	49%	61%	88%
Convenience Stores	32%	65%	49%	19%	36%	64%
Wholesalers	9%	23%	15%	4%	10%	17%
Online retailers	9%	29%	13%	4%	11%	19%
Off licences	15%	38%	25%	7%	18%	31%
Wine, beer or cider clubs	11%	26%	18%	4%	10%	19%

Base: All drinkers, core sample 1011, Harmful incl. boost (200), hazardous incl. boost (313), moderate (623) low-income incl. boost (559) and low income & hazardous or harmful drinkers incl. boost (208) Q19 How often have you typically purchased alcohol from the following type of retailers in the last 12 months

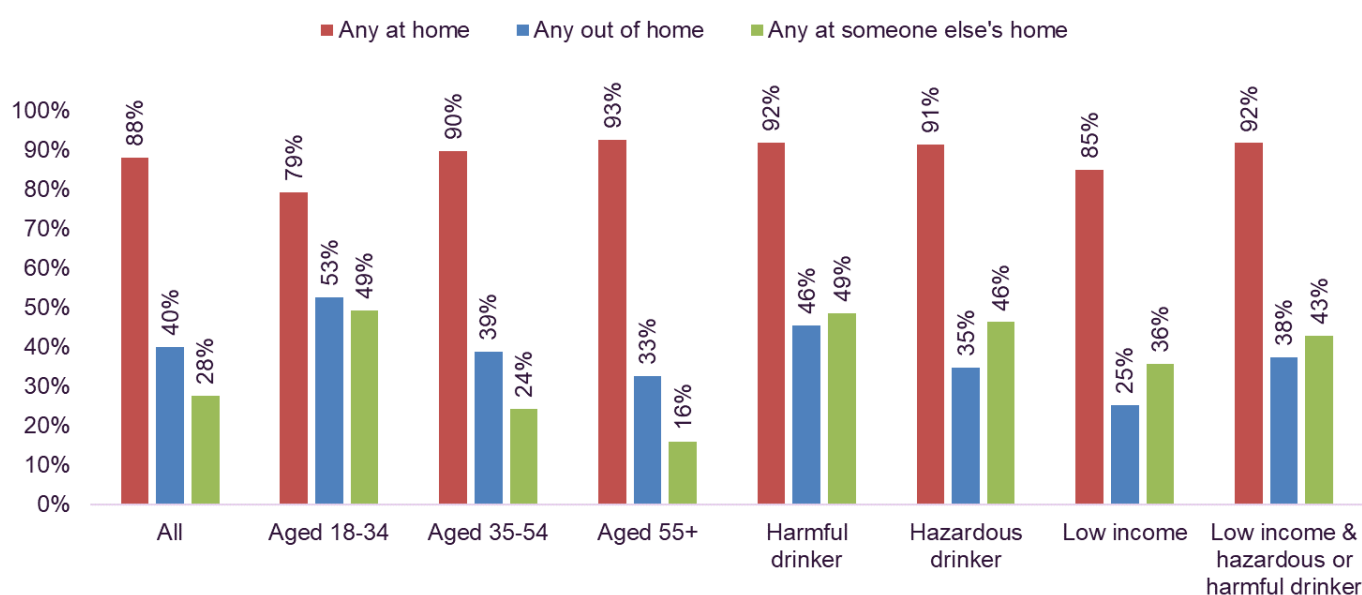
4.4 Qualitative participants told us that although most alcohol purchases were made whilst shopping for groceries, alcohol itself typically fell outside of any grocery budgets. Where changes had been made to alcohol purchasing as a result of inflation this did not include switching the types of alcohol. Instead, cost saving strategies included buying less (moderate drinkers), trading down to cheaper brands, shopping more to offers, buying alcohol from the discounters or wholesalers, drinking at pubs and bar restaurants less often and buying cheaper mixers. This suggests that if alcohol buyers are not switching the types of alcohol they buy as a result of inflation, but are rather finding ways to save money within the types they normally buy, they may be unlikely to do so with the introduction of a DRS.

Where retail purchased alcoholic drinks are consumed

4.5 Most drinkers are buying alcoholic drinks from retailers for consumption at home. However, certain sub-groups are more likely to also be consuming retail purchased drinks out of home; hazardous and harmful drinkers and younger adults (see Figure 4.2). To help facilitate the returning of containers amongst these subgroups the research suggests it will be important for deposit return points to be in locations where retail purchased alcoholic drinks are most likely to be consumed out of home (parks, beaches, transport hubs). If drinkers feel it is difficult to return containers, there is a greater risk single format higher strength types (wine, spirits, liqueurs or

fortified wine) may be purchased over lower strength multipack alcohol types, such as cider or beer, where the deposit lost would be less if they were disposed of in general rubbish bins. As shown in Table 4.2, of those drinking each type, cider and beer is significantly more likely to be consumed out of home than compared to spirits, liqueurs or fortified wines amongst harmful drinkers.

Figure 4.2 Where retail purchased alcoholic drinks are consumed



Base: Core sample all drinkers 1011, 18-34 (276), 35-54 (315), 55+ (420), Harmful incl. boost (200), hazardous incl. boost (313), low-income incl. boost (559) and low income & hazardous or harmful drinkers incl. boost (208) Q23 And in the last 12 months where have you consumed these alcoholic drinks that you have purchased from retailers?

Table 4.2 Percentage of those who consume each type of alcoholic drink who drink it out of home

	Total	Harmful	Hazardous	Moderate
Beer	23%	33%	27%	18%
Cider	27%	49%	26%	20%
Wine	20%	31%	24%	15%
Spirits, Liqueurs or Fortified wine	18%	22%	22%	15%

Base: Those consuming beer 567, cider 388, wine 511, spirits, liqueurs or fortified wine 660 (RTDs not shown due to low base size) Q23 And in the last 12 months where have you consumed these alcoholic drinks that you have purchased from retailers

5. Consumption of alcoholic drinks

The purpose of this section is to highlight applicable behaviours and attitudes with regards to types of alcohol consumed, and the implication on likely purchasing behaviours with the introduction of DRS.

5.1 In talking with qualitative participants, it was clear that the types of alcoholic drinks they consumed were closely associated with certain occasions or situations.

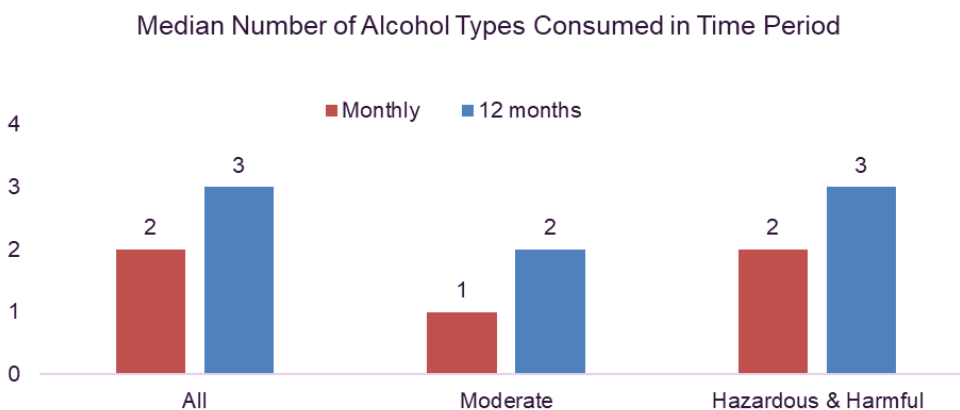
'Wine if I'm visiting friends or my sister, it's ciders or beer if a match is on or I'm seeing my brother, gin is my drink, I have it to unwind it's a weekend thing.'
Female, 35-54, Hazardous

'I drink lager if it's just me or I've got my mates round, but I'll drink wine with my girlfriend.' Male, 18-34, Hazardous

This suggests that this habitual behaviour would act as a barrier to switching to an alternative type of alcohol with the introduction of the DRS.

5.2 In the survey, most also had a relatively limited repertoire of types they consumed regularly. On average (median), drinkers were only consuming 3 types of alcohol per year, and 2 types per month. Even amongst harmful and hazardous drinkers on average only 2 types were being consumed per month, and 3 types over the course of a year.

Figure 5.1 Median number of alcohol types consumed



Base: All drinkers core sample 1011, moderate (623), hazardous and harmful (513) Types: 1. Beer, 2. Cider 3. Wine 4. Spirits, Fortified Wine or Liqueurs 4. RTDs Q8 Thinking about the last 12 months which of the following types of alcoholic drinks have you had? Q9, Q11, Q13, Q15, Q17 During the last 12 months, how often have you had a drink of the following....?

5.3 This seemed to be because most have a preferred type of alcoholic drink, they drink more than others (82%, table 5.1), meaning that switching to an alternative type with the introduction of the DRS would again require an additional change in habits. Furthermore, the quantitative research suggested that harmful and hazardous drinkers were slightly more likely to have a preferred drink than moderate drinkers (87% and 85% vs. 79% respectively). For hazardous and harmful drinkers who drink beer at least 3 to 4 times a week, this preference increased to 90%, suggesting they may be less likely to switch to a higher strength single format alcohol type with the DRS.

Table 5.1 Percentage who have a preferred type of alcoholic drink

	Total	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income & Hazardous or Harmful drinker
Strongly Agree	40%	43%	42%	36%	46%	48%	35%	51%
Tend to agree	42%	36%	44%	44%	42%	37%	44%	34%
SUM Agree	82%	79%	86%	80%	87%	85%	79%	85%

Base: All drinkers core sample 1011, 18-34 (276), 35-54 (315), 55+ (420) Harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and hazardous incl. boost or harmful drinker incl. boost (208) Q24 To what extent do you agree or disagree with these statements?

5.4 In talking with qualitative participants, it was also evident that preferred alcohol types had a strong emotional connection. For moderate and some hazardous drinkers, a favourite alcohol type was often associated with being a treat or me time.

‘People know what they like and know what they don’t. I’m still going to buy Guinness, it’s an enjoyment product.’

Furthermore, they also often referred to their favourite type in terms of ‘my...’ demonstrating a possessive attitude to preferred types. This was also true of those drinking at a harmful level.

‘Lager is my thing; I like it cold.’ Male, 35-54, Harmful

‘JD [Jack Daniels] and coke, is my drink.’ Male, 35-54, Harmful

5.5 Harmful and hazardous drinkers are drinking the types they consume more frequently than moderate drinkers. Thus, arguably will be more exposed to deposit payments. They are also drinking multipack alcohol types (beer, ciders), more often than moderate drinkers. Younger adults are also buying cider more often than other age groups (See Table 5.2).

Table 5.2 Types consumed at least once a month

	All	Age 18-34	Age 35-54	Age 55+	Harmful	Hazardous	Moderate
Standard beer	51%	49%	51%	52%	71%	65%	41%
Strong beer	25%	36%	27%	17%	48%	37%	15%
Standard cider	25%	33%	25%	20%	48%	37%	16%
Fruit cider	23%	40%	24%	11%	42%	35%	14%
Premium/Vintage cider	22%	30%	24%	15%	40%	31%	13%
Strong cider	9%	17%	11%	3%	28%	15%	2%
Wine	44%	37%	37%	54%	64%	57%	33%
Spirits	43%	44%	43%	42%	61%	54%	35%
Fortified Wine	5%	4%	4%	5%	9%	6%	3%
Liqueurs	9%	11%	7%	8%	14%	12%	7%
RTDs	8%	12%	11%	4%	20%	12%	5%

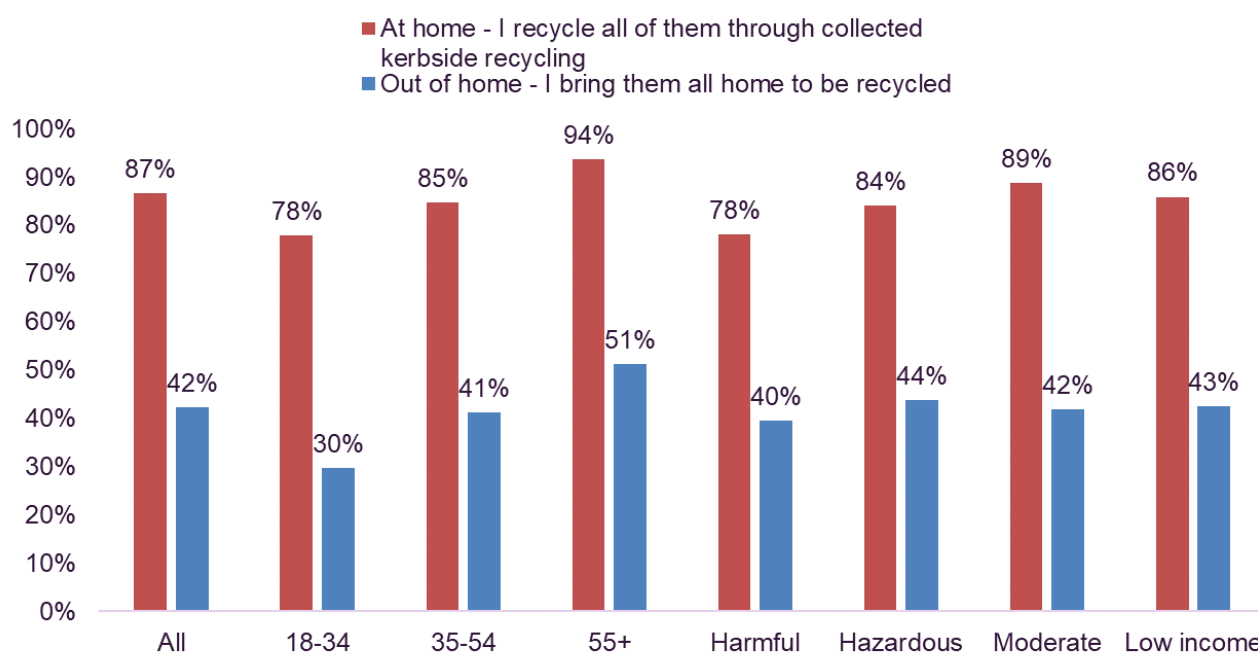
Base: All drinkers core sample 1011, 18-34 (276), 35-54 (315), 55+ (420) Harmful incl. boost (200), hazardous incl. boost (313), moderate (623) Q Q9, Q11, Q13, Q15, Q17 During the last 12 months, how often have you had a drink of the following?

6. Recycling attitudes and behaviours

The purpose of this chapter is to describe current behaviours and attitudes towards recycling, and what influence this may have on alcohol purchasing behaviours with the introduction of the DRS.

6.1 Recycling alcoholic drinks containers was an ingrained routine for most participants in both the qualitative and quantitative research. Some nine in ten (87%) of survey participants reported recycling all their containers through kerbside recycling and an additional 9% dispose of containers partly through recycling and partly in general waste (see Figure 6.1).

Figure 6.1 Propensity to recycle alcoholic drinks containers at home and out of home



Base: Core sample all drinkers 1011, 18-34 (276), 35-54 (315), 55+ (420) Harmful incl. boost (200), hazardous incl. boost (313), low-income incl. boost (559) Q76 How do you currently dispose of alcoholic drink containers?

6.2 In the qualitative research, those that generally found it easiest to recycle containers were those who lived in accommodation that enabled them to store containers outside in recycling bags or boxes (i.e., lived in houses rather than flats). However, 23% of harmful drinkers and 25% of low income harmful and hazardous drinkers within the sample lived in flats. Significantly more than moderate drinkers at 15% (see Table 6.1)

Table 6.1 Type of accommodation lived in

	Tot al	18- 34	35- 54	55+	Harmf ul	Hazardo us	Moderat e	Low income & Hazardo us or Harmful drinker
Detached house	23			31				
	%	16%	20%	%	21%	24%	23%	12%
Semi-detached house	36			29				
	%	40%	41%	%	34%	33%	36%	32%
Mid-terraced house	21			23				
	%	16%	23%	%	19%	22%	22%	26%
Flat	17			13				
	%	23%	15%	%	23%	18%	15%	25%
Room in shared house	1%	5%	0%	0%	3%	2%	1%	3%
Bedsit	0%	0%	0%	0%	0%	0%	0%	0%
Other	2%	0%	1%	4%	1%	1%	3%	2%

Base: Core sample all drinkers 1011, 18-34 (276), 35-54 (315), 55+ (420) Harmful incl. boost (200), hazardous incl. boost (313), low-income incl. boost (559) Q77 What type of accommodation do you live in?

6.3 The propensity to recycle alcoholic drinks containers is therefore highest in the location where most retail purchased alcoholic drinks are consumed (in the home environment). In talking to qualitative participants, motivations to recycle at home were driven more by social expectation than a deep concern for the environment. As one participant in the qualitative research commented:

'I see them in country lanes, I travel a lot and think Wales is one of the worst, but it doesn't keep me awake at night' Female 18-24, Moderate

6.4 The tendency to recycle containers when alcoholic drinks are consumed out of home, however, was found to be significantly lower, with 42% of survey participants reporting that they always bring containers home to be recycled (Figure 6.1). An additional, one in four (24%) reported sometimes bringing them home to be recycled and sometimes putting in general waste bins. Qualitative participants told us they rarely saw out of home recycling bins, and where they did exist there was concern about contamination. Out of home, the convenience of disposing of drinks containers was often outweighing any concerns about needing to recycle. Here the

social expectation was expressed as long as I'm not littering, by placing the container in a general waste bin, it's okay.

'If we are out on a picnic, we'll put in a bin as near as possible...a local bin not a recycling bin.'

- 6.5 Both the qualitative and quantitative research suggests that younger adults (aged 18-34) are least likely to be recycling both at home and out of home. In the qualitative research the most frequently cited reasons for this were for accommodation reasons (where living arrangements made it harder to recycle) or for convenience. Whilst only 5% of survey respondents aged under 35 lived in shared accommodation, 23% lived in flats where there may be shared bin facilities. This is significantly higher than for other age groups (Table 6.1).

7. Awareness of, and attitudes towards, the Deposit Return Scheme

The purpose of this chapter is to outline the awareness of and attitudes towards the Deposit Return Scheme in the context of alcoholic drinks, and the potential implications for purchasing behaviours.

7.1 Amongst survey respondents, 37% were aware of the Deposit Return Scheme being developed. However, there were some notable differences between sub-groups, as shown in Table 7.1. Under 35s were least likely to be aware of the scheme (27%), compared to 46% of over 55s. Harmful drinkers were also slightly more likely to be aware of the DRS (42%) compared to 36% of moderate drinkers. This is consistent with data collected as part of the Welsh Government’s ongoing evaluation of the MPA legislation²⁶ looking at the awareness of MUP, where younger adults had lowest awareness and higher risk drinkers were more likely to be aware of the policy. Of relevance to the current study, however, is that the qualitative participants we spoke to reported they had not switched alcohol types as a result of the introduction of MUP. This potentially, suggests that if they did not switch alcohol types with an increase in the price of some drinks with the introduction of MPU, then the application of a refundable deposit on drinks containers would also therefore be unlikely to result in switching to different drink types.

‘It’s not affected me massively; I still buy cider.’ Female, 25-34, harmful drinker’

Table 7.1 Aware of Deposit Return Scheme

	Total	Male	Female	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income & Hazardous or Harmful drinker
Yes	37%	43%	31%	27%	33%	46%	42%	32%	36%	33%
No	60%	53%	67%	70%	65%	50%	56%	65%	60%	62%
Don't know	3%	4%	2%	3%	2%	4%	3%	4%	3%	5%

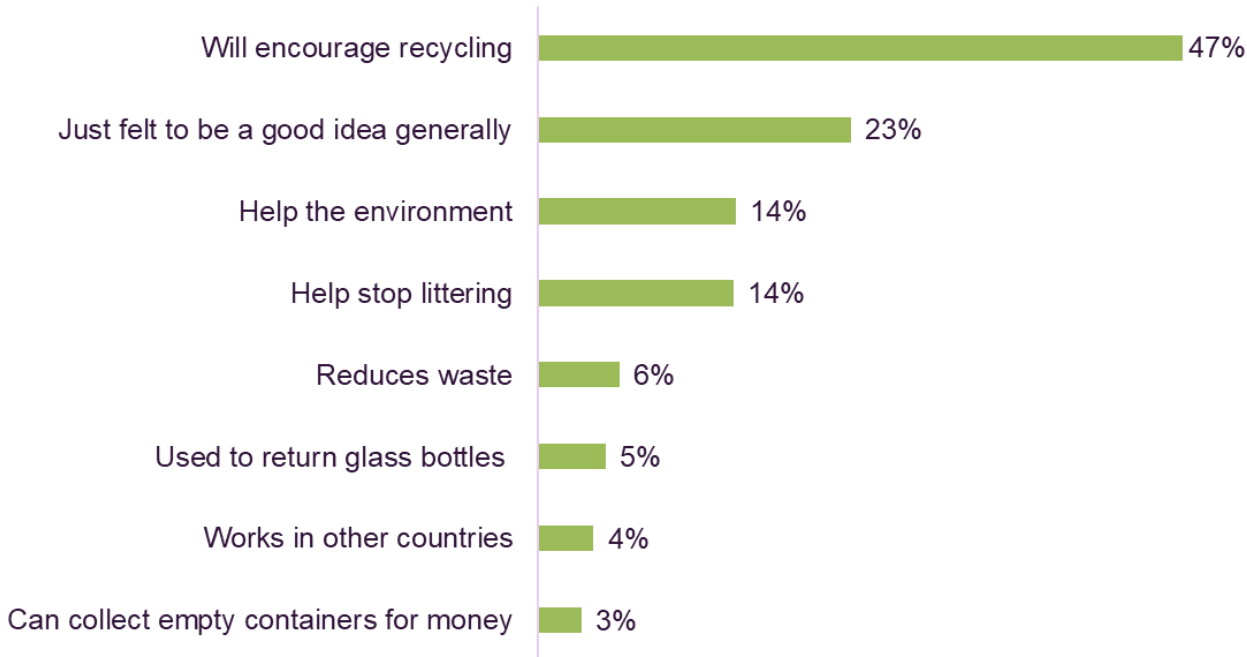
Base: Core Sample All drinkers 1011, Male (509), Female (497), 18-34 (276), 35-54 (315), 55+ (420), Harmful incl. boost (200), Hazardous incl. boost (313), Moderate (623), Low income & Hazardous or Harmful drinker incl. boost (208) Q25 The Welsh Government, alongside the other Governments

²⁶ [Public attitudes to and awareness of minimum pricing for alcohol in Wales 2018 – 2022, Social Research Number 59/2023](#)

in the UK, is working on a new approach to recycling drinks containers, called a deposit return scheme or DRS. It aims to improve recycling rates and reduce litter. Before today had you heard about this scheme?

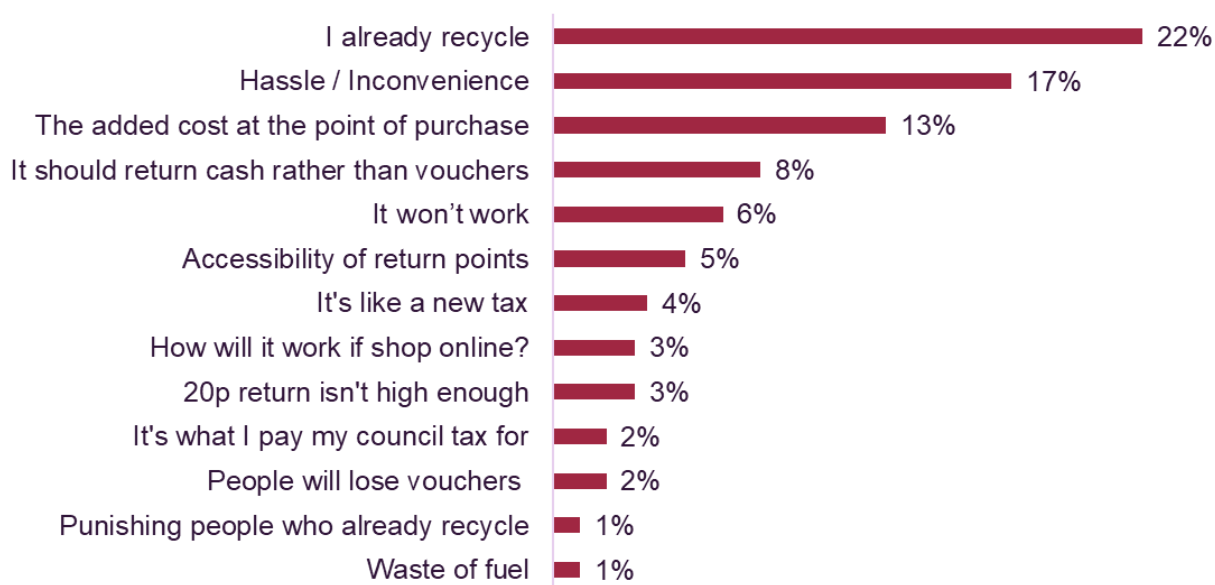
7.2 More than half of survey participants felt at least somewhat positive towards the DRS scheme (59%), but a quarter (25%) felt actively negative towards it (17% were neutral). In free text responses, of the 59%, who felt at least somewhat positive the main reasons given were because it would encourage recycling (47%), was felt to be a good idea generally (23%), help the environment generally (14%) and stop littering (14%). 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 (8%).

Figure 7.1 Reasons for feeling positive towards the proposed DRS (coded from verbatim responses)



Base: Core sample, those who selected 'I really like this idea' or felt 'somewhat positive about it' in response to the question (Q27) 'what is your first reaction to the scheme', (589) Q28 Please could you describe why you feel this way regarding the Deposit Return Scheme.....?

Figure 7.2 Reasons for feeling neutral or negative towards the proposed DRS



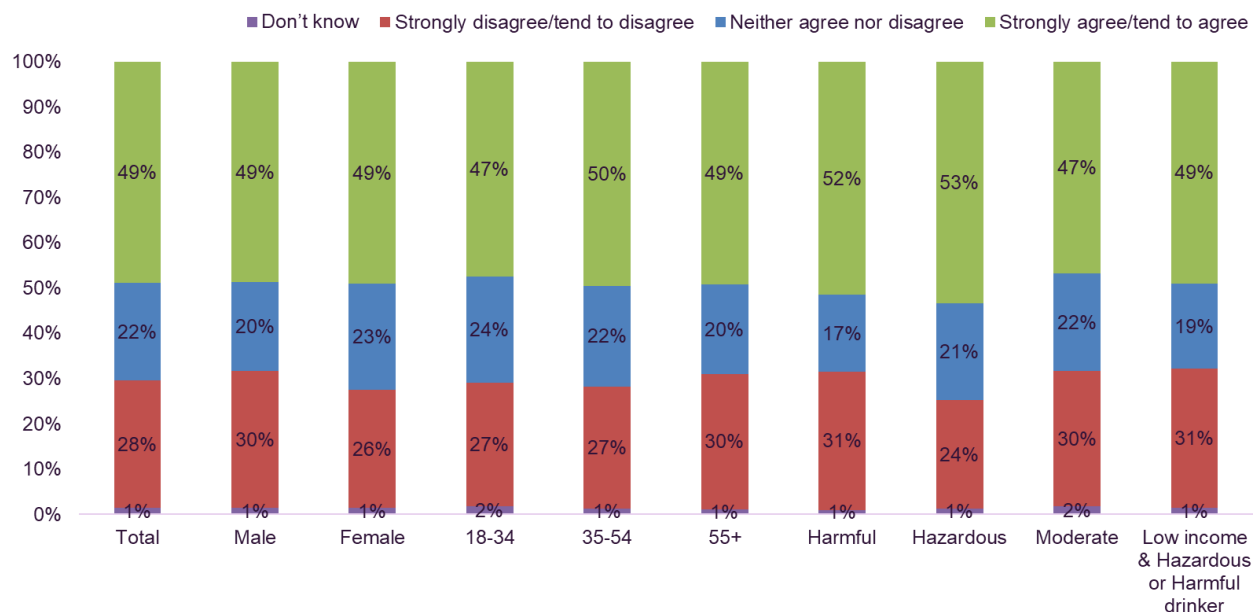
Base: Core sample, those who selected 'I don't like it at all', 'somewhat negative' or neutral' in response to the question (Q27) 'what is your first reaction to the scheme', (422) Q28 Please could you describe why you feel this way regarding the Deposit Return Scheme.....?

7.3 In the survey, when asked directly, nearly half of respondents (49%) felt resentful that the scheme was being introduced when they already recycle, and a similar proportion (45%) reported it was unfair they would be forced to use this scheme to get their deposit back. These sentiments were consistent across drinker type, income level and demographics in the quantitative and qualitative research (see Figures 7.3 and 7.4). This suggests that communications around the launch will need to clearly highlight the personal benefits of the scheme to consumers.

'If they introduced it, I would have to go with it, but at the moment the council do it, they make it easy for you. This penalises those who are recycling at the moment.' Male, 65+, moderate

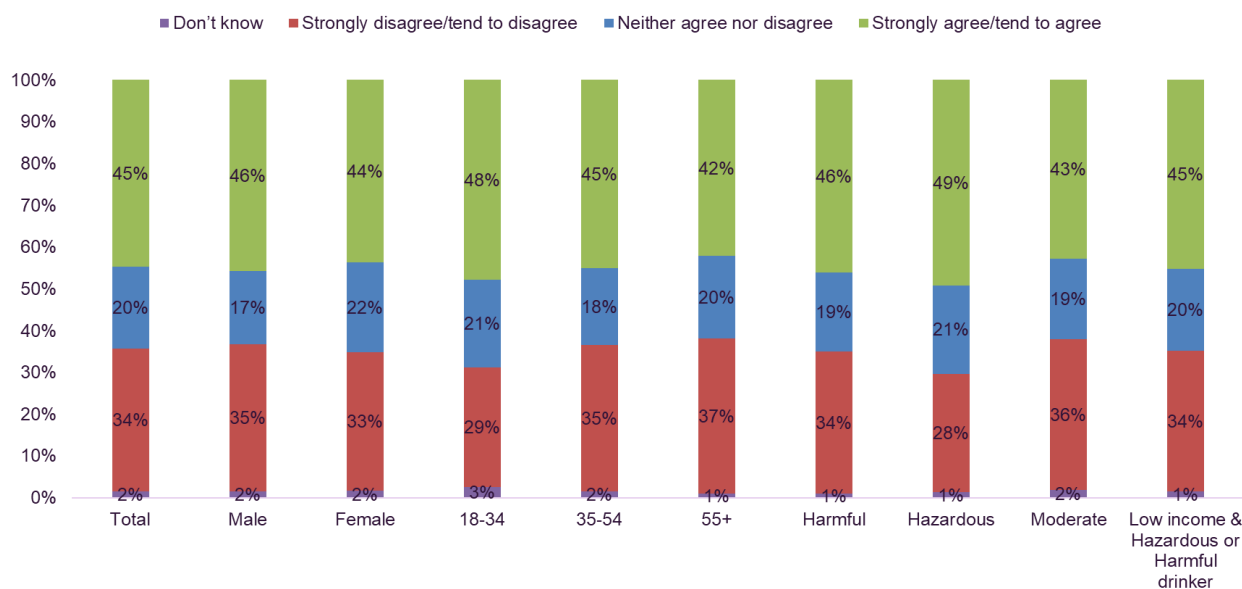
'So, if I buy 2 bottles, but put them in the recycling bin, I'm still doing the right thing, but I'm getting penalised by losing 40p? It doesn't make sense.' Male, 45-54, harmful

Figure 7.3 Agreement with statement ‘I feel resentful that this scheme is being introduced when I already recycle’



Base: Core sample all drinkers 1011, Male (509), Female (497), 18-24 (276), 35-54 (315), 55+ (420), harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and hazardous or harmful incl. boost (208) Q72 And to what extent do you agree or disagree with these statements regarding the Deposit Return Scheme?

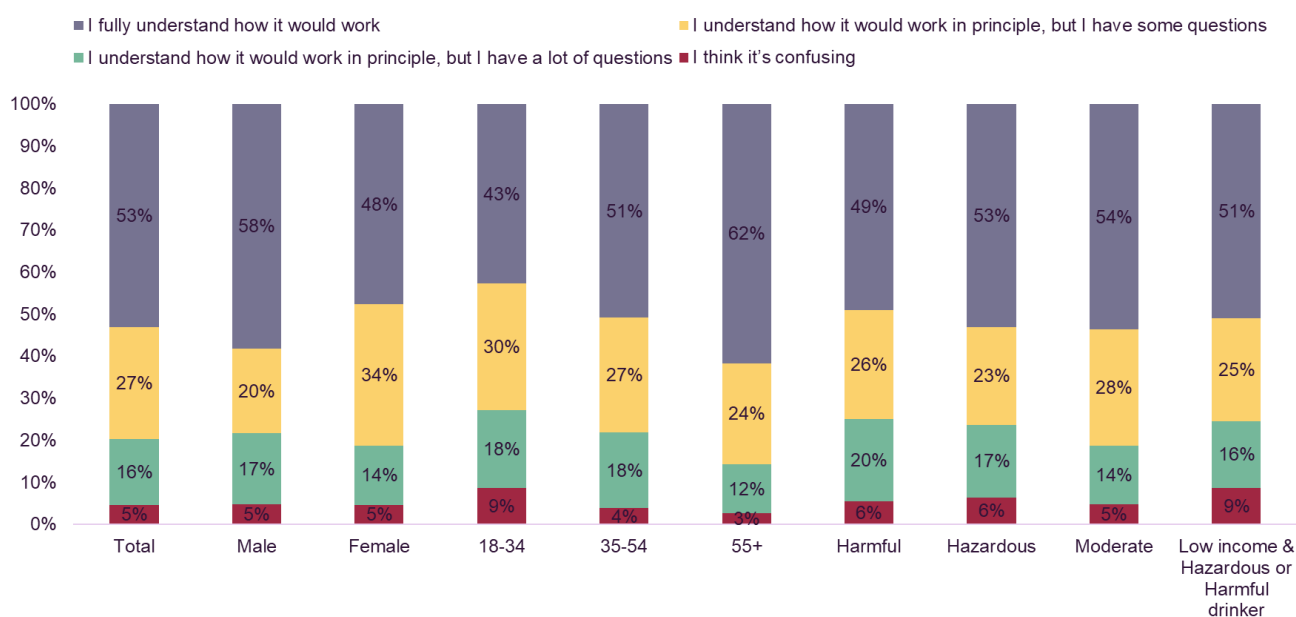
Figure 7.4 Agreement with statement ‘It’s unfair that I would be forced to use this scheme to get my deposit back’



Base: Core sample all drinkers 1011, Male (509), Female (497), 18-24 (276), 35-54 (315), 55+ (420), harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and hazardous or harmful incl. boost (208) Q72 And to what extent do you agree or disagree with these statements regarding the Deposit Return Scheme?

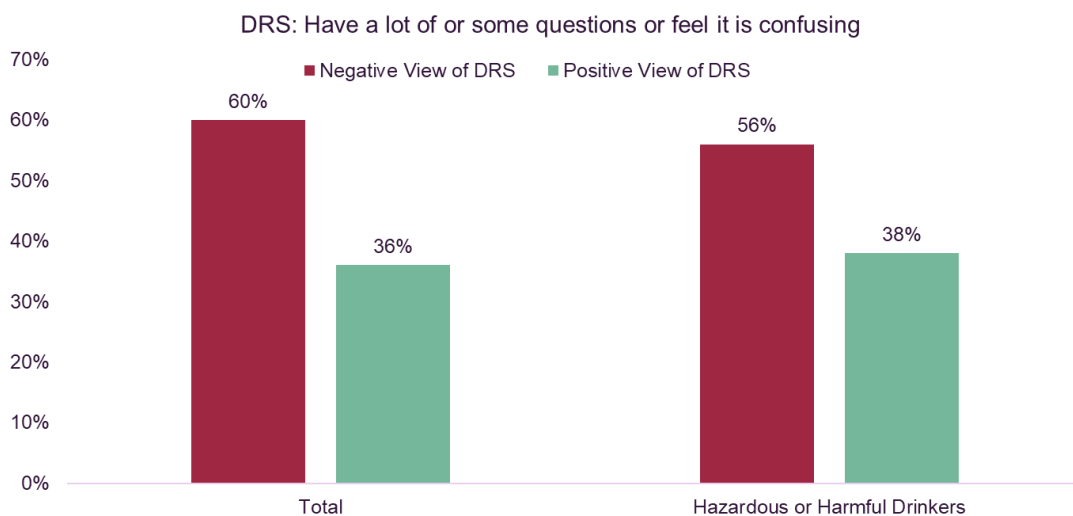
7.4 In both the online survey and depth interviews, participants were shown an explanation of how the DRS scheme would work. In the survey just under half of respondents (47%) still had questions about the scheme or thought it was confusing. Respondents aged 18-34 years were most likely to have questions or find it confusing (57%) compared to 38% of those aged 55 years or over, as shown in Figure 7.5. 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 who had a positive view of it. The research therefore suggests that clarity of communication and addressing frequently asked questions upfront may be important in encouraging engagement with the DRS.

Figure 7.5 Understanding of the DRS scheme



Base: Core sample all drinkers 1011, Male (509), Female (497), 18-24 (276), 35-54 (315), 55+ (420), harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and hazardous or harmful incl. boost (208) Q29 And which of the following best describes your understanding of how the deposit return scheme would work?

Figure 7.6 Relationship between understanding of the proposed DRS and perceptions of it



Base: Core sample all drinkers 1011, hazardous or harmful drinkers incl. boost (513) Q29 And which of the following best describes your understanding of how the deposit return scheme would work? (Q27) What is your first reaction to the scheme

7.5 Respondents in the quantitative research were given opportunity to raise questions about the DRS via a free text with a summary of question areas found in Figure 7.7. By far the most frequently raised question in the quantitative research was around the location of return points (26% of those providing a response). This also came out as a key concern in the qualitative research, particularly for participants who lived in rural areas. In part this was driven by a need for convenience, but also a concern that the scheme would end up costing them money due to the transport/petrol costs of driving to return points.

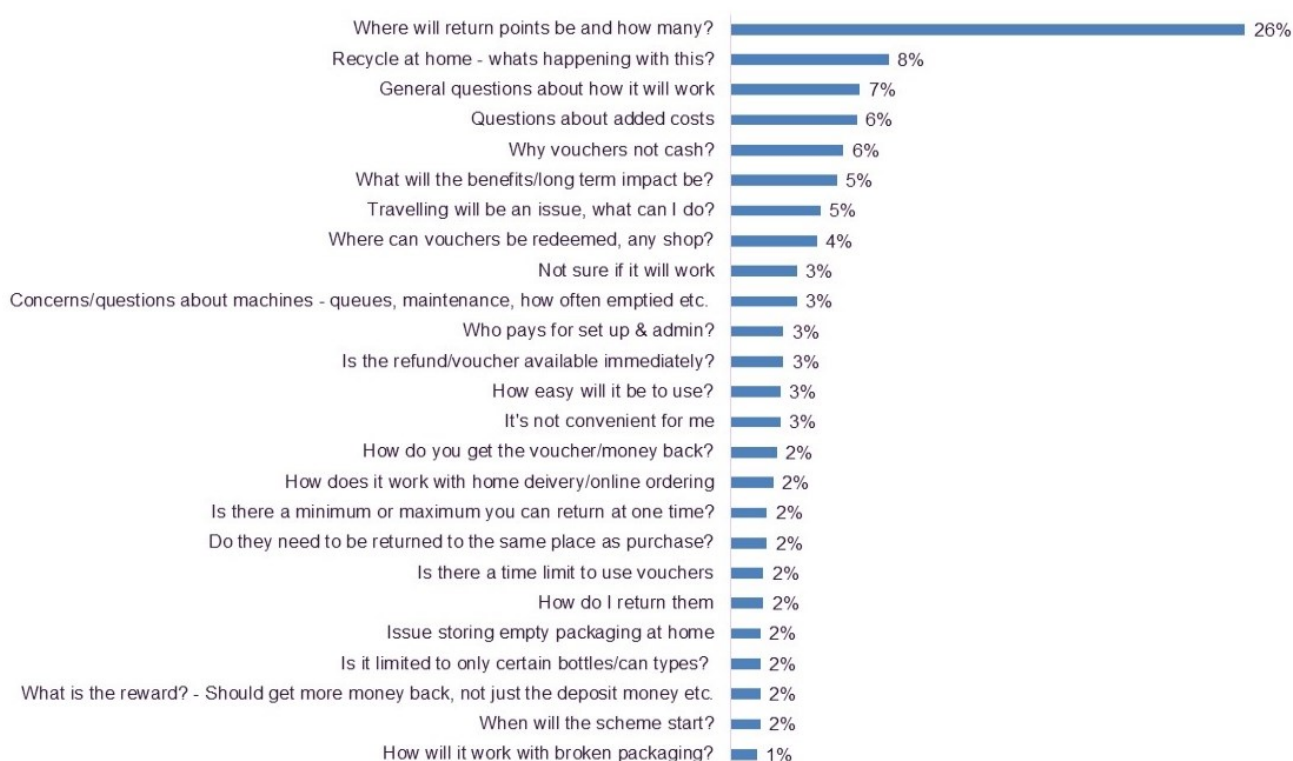
'By the time I've driven for 5 minutes, is it worth it for 20p?'

'Now it's going to cost me more as I've got to return them.'

'If it's not on my route I wouldn't do it.'

The next most frequently cited question area was around vouchers, for example why vouchers were given back not cash, where vouchers can be redeemed, and their expiry date. Beyond questions around the location of return points and vouchers, other question areas were only noted by a minority of respondents.

Figure 7.7 Questions about how the DRS scheme will work for alcoholic drinks containers

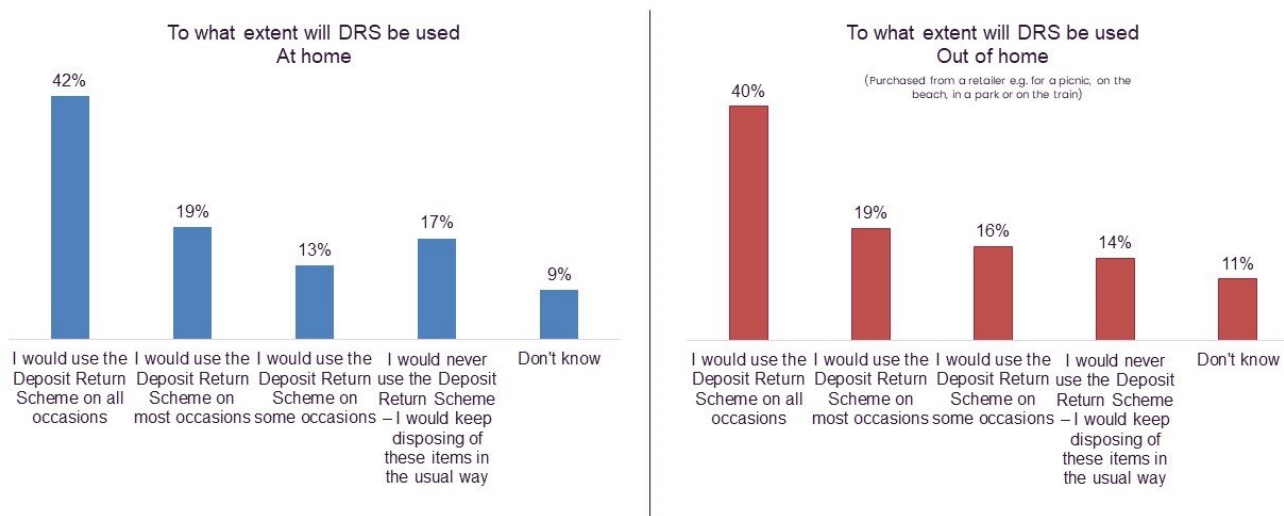


Base: Those who had questions about how the scheme would work 427 Q30 What are the main questions you have about how it would work? (Coded from verbatim responses)

Intention to use the DRS

7.6 Two in five (42%) of survey respondents reported they would use the DRS to dispose of alcoholic drinks containers where drinks had been consumed at home, and a similar proportion (40%) when out of home. Around one in five (19%) reported they would use it on most occasions, both at home and out of home (shown in Figure 7.8). Those aged between 18-34 years were less likely than other age groups to report that they would use the DRS to dispose of containers all of the time or most of the time when consuming out of home (49% compared to 64% of 35–54-year-olds and 64% of those aged 55 year or over, as shown in Table 7.3). This is relevant because, 18–34-year-olds are more likely to be consuming alcoholic drinks out of home (53%) than older age groups (Figure 4.2).

Figure 7.8 Intention to use the DRS for alcoholic drinks containers



Base: All drinkers At home 1011 & Out of Home 904 (rebased those who consume alcoholic drinks out of home only) Q31 To what extent do you think you would use a Deposit Return Scheme to dispose of alcoholic drinks containers?

Table 7.2 Intention to use the DRS for alcoholic drinks containers where drinks are consumed at home

	Total	Male	Female	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income & Hazardous or Harmful drinker
I would use the Deposit Return Scheme on all occasions	42%	46%	38%	30%	44%	48%	41%	40%	43%	42%
I would use the Deposit Return Scheme on most occasions	19%	18%	21%	27%	18%	15%	25%	20%	17%	17%
I would use the Deposit Return Scheme on some occasions	13%	10%	15%	21%	11%	9%	14%	13%	13%	14%
I would never use the Deposit Return Scheme – I would keep disposing of these items in the usual way	17%	17%	18%	14%	17%	20%	14%	17%	17%	15%
Don't know	9%	9%	8%	8%	10%	8%	7%	11%	9%	12%

Base: Core sample all drinkers 1011, Male (509), Female (497), 18-24 (276), 35-54 (315), 55+ (420), harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and hazardous or harmful incl. boost (208) Q31 To what extent do you think you would use a Deposit Return Scheme to dispose of alcoholic drinks containers? For alcoholic drinks consumed at home

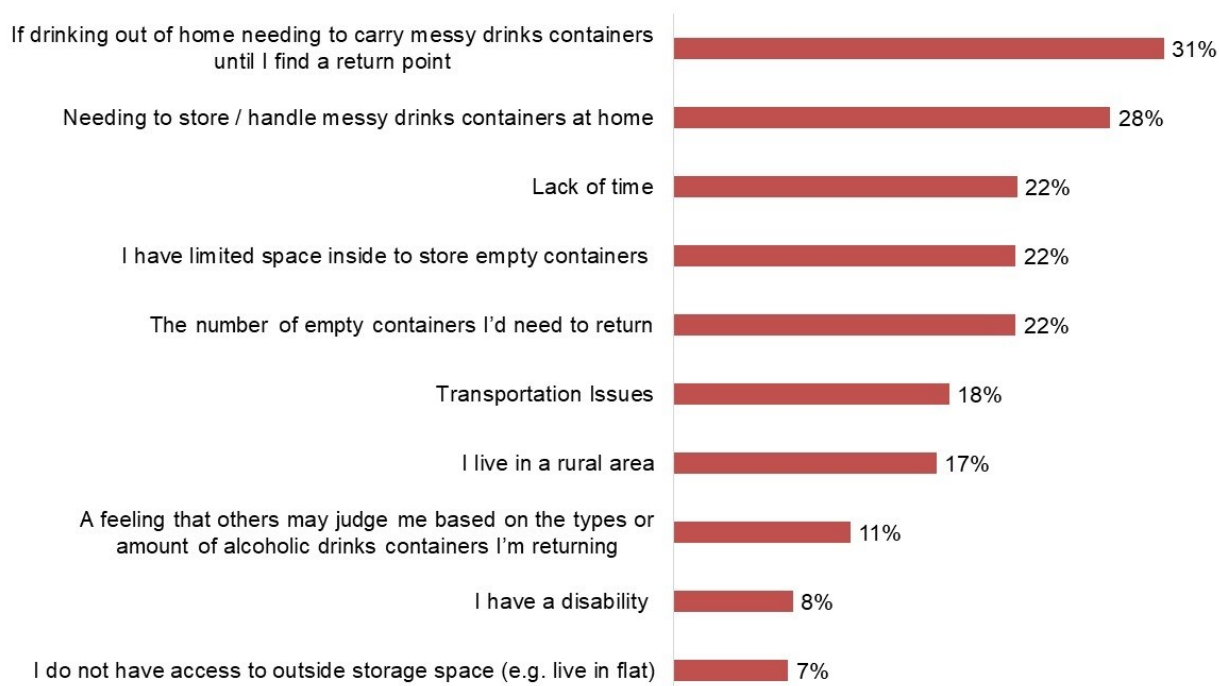
Table 7.3 Intention to use the DRS for alcoholic drinks containers where drinks are consumed out of home but purchased from a retailer (e.g. for a picnic, on the beach, in a park or on the train)

	Total	Male	Female	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income & Hazardous or Harmful drinker
I would use the Deposit Return Scheme on all occasions	40%	44%	37%	28%	41%	49%	39%	40%	41%	41%
I would use the Deposit Return Scheme on most occasions	19%	19%	20%	21%	23%	15%	23%	18%	17%	17%
I would use the Deposit Return Scheme on some occasions	16%	14%	18%	24%	13%	13%	17%	16%	16%	15%
I would never use the Deposit Return Scheme – I would keep disposing of these items in the usual way	14%	13%	15%	15%	14%	13%	11%	13%	15%	13%
Don't know	11%	11%	11%	13%	10%	10%	9%	13%	11%	14%

Base: Core sample all drinkers who drink alcoholic drinks out of home 904, Male (454), Female (445), 18-24 (270), 35-54 (288), 55+ (351), harmful incl. boost (183), hazardous incl. boost (288), moderate (551), low income and hazardous or harmful incl. boost (190) Q To what extent do you think you would use a Deposit Return Scheme to dispose of alcoholic drinks containers? For alcoholic drinks consumed out of home but purchased from a retailer (e.g. for a picnic, on the beach, in a park or on the train)

- 7.7 Although intentions to use the DRS out of home are lower amongst 18 to 34-year-olds than for other age groups, from the perspective of increasing recycling rates, the research suggests the DRS may still result in an improvement on current levels amongst this age group. In the survey 62% of the 18 to 34-year-olds who currently don't always recycle containers out of home agreed that they would be more likely to do so with DRS.
- 7.8 Both survey and depth interview participants were asked about any difficulties they may face in collecting and returning containers within the DRS. Being able to return containers and claim back the deposit (thus avoiding monetary loss) will potentially be important in avoiding any changes in purchasing behaviours that may lead to an increase in alcohol unit consumption. The main reason why survey respondents felt it would be difficult to collect and return containers related to handling and storing messy containers. Some three in 10 (31%) stated the need to carry around messy containers would be difficult, and a similar proportion (28%) cited the need to store messy containers at home until returned. Having limited space to store empty containers was an additional issue with regards to home storage, 22% giving this reason (see Figure 7.9).

Figure 7.9 Barriers to collecting and returning empty alcoholic drinks containers



Base: Core sample all drinkers, 1011 Q32 And what, if anything, do you think would make it difficult for you to collect & return empty alcoholic drinks containers?

7.9 There were some statistically significant differences between subgroups regarding difficulties in using the DRS, as shown in Table 7.4 Survey respondents aged between 18-34 years were most likely to state that they saw any difficulty in using the DRS, 89% stating any difficulty, compared to 69% of those aged 55 years or older. With a higher propensity to consume alcoholic drinks out of home, 18 to 34-year-olds were significantly more likely to state the need to carry messy drinks containers with them would be a barrier to using the DRS in this situation (37% versus 25% of respondents aged 55 years or older). A lack of time was also reported to be more of a factor for 18 to 34-year-olds, 37% giving this as a reason compared to 27% of 35 to 54-year-olds and 9% of over 55s. A lack of time was also more of an issue for parents of children aged under 18, 34% stating this as a difficulty compared to 18% of those without children. Separately survey respondents were asked directly how easy or difficult it would be for them in their everyday life to 'find the time to return containers'. Half (51%) of 18 to 34-year-olds felt that finding the time to return containers would be difficult and 44% of parents of children aged

under 18 also felt that they would find it difficult to find the time to return drinks containers.

One interviewee noted:

'Will be yet another thing I have to keep in my head...another thing adding to working mums, another unsaid task...what if there is a long queue, how much more time will that add on to my shop.' Female, 35-44, moderate

Table 7.4 Barriers to collecting and returning empty alcoholic drinks containers

	Total	18-34	35-54	55+	Children in Household aged <18	Harmful	Hazardous	Moderate	Low income	Not low income	Low income & Hazardous or Harmful drinker
If drinking out of home - needing to carry messy drinks containers until I find a return point	31%	37%	34%	25%	37%	34%	33%	30%	28%	32%	33%
Needing to store / handle messy drinks containers at home	28%	32%	23%	29%	29%	28%	27%	28%	26%	28%	25%
Lack of time	22%	37%	27%	9%	34%	22%	26%	20%	18%	24%	21%
I have limited space inside to store empty containers	22%	23%	26%	18%	24%	25%	19%	22%	19%	23%	21%
The number of empty containers I'd need to return	22%	22%	25%	20%	26%	29%	25%	17%	17%	24%	23%
Transportation issues e.g. no access to a car, don't drive, poor access to public transport	18%	20%	18%	16%	18%	23%	18%	16%	22%	15%	23%
I live in a rural area	17%	12%	17%	20%	17%	15%	19%	17%	19%	15%	18%
A feeling that others may judge me based on the types or amount of alcoholic drinks containers I'm returning	11%	14%	12%	8%	14%	21%	16%	7%	12%	11%	19%
I have a disability	8%	5%	8%	9%	5%	12%	6%	8%	13%	5%	13%
I do not have access to outside storage space (e.g. live in flat)	7%	11%	6%	6%	7%	10%	9%	6%	11%	6%	12%
A medical a reason	4%	3%	6%	4%	4%	9%	4%	4%	7%	3%	8%
I live in shared accommodation (shared house or student accommodation)	3%	9%	2%	1%	2%	7%	3%	2%	3%	3%	4%
Infirmity	3%	4%	3%	2%	3%	4%	2%	2%	2%	3%	4%
Nothing	22%	11%	19%	31%	18%	15%	20%	24%	20%	24%	16%

Base: Core sample all drinkers 1011, Male (509), Female (497), 18-24 (276), 35-54 (315), 55+ (420), children in household aged <18 (249), harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income incl. boost (559) low income and hazardous or harmful incl. boost (208) Q32 And what, if anything, do you think would make it difficult for you to collect & return empty alcoholic drinks containers?

7.10 Amongst lower income drinkers in the survey, transportation issues (e.g., no access to a car, don't drive, poor access to public transport) was significantly more likely to

be given as a difficulty (22%) compared to those with higher incomes (15%). Amongst harmful drinkers, the number of containers they would need to return (29%) and a concern about being judged based on the types or number of alcoholic drinks containers they were returning (21%), were more of an issue than for moderate drinkers (17% and 7% respectively), as shown in Table 7.5. When asked directly in the survey, 43% of harmful drinkers and 35% of hazardous agreed with the statement 'I would worry that other people would judge me based on the number or types of alcohol containers I might return'.²⁷ This was also reflected in the qualitative research.

'I don't want to walk into my local convenience store with a bag load of glass bottles and cans, if you have a large amount people would judge you.' Female, 35-54, harmful drinker

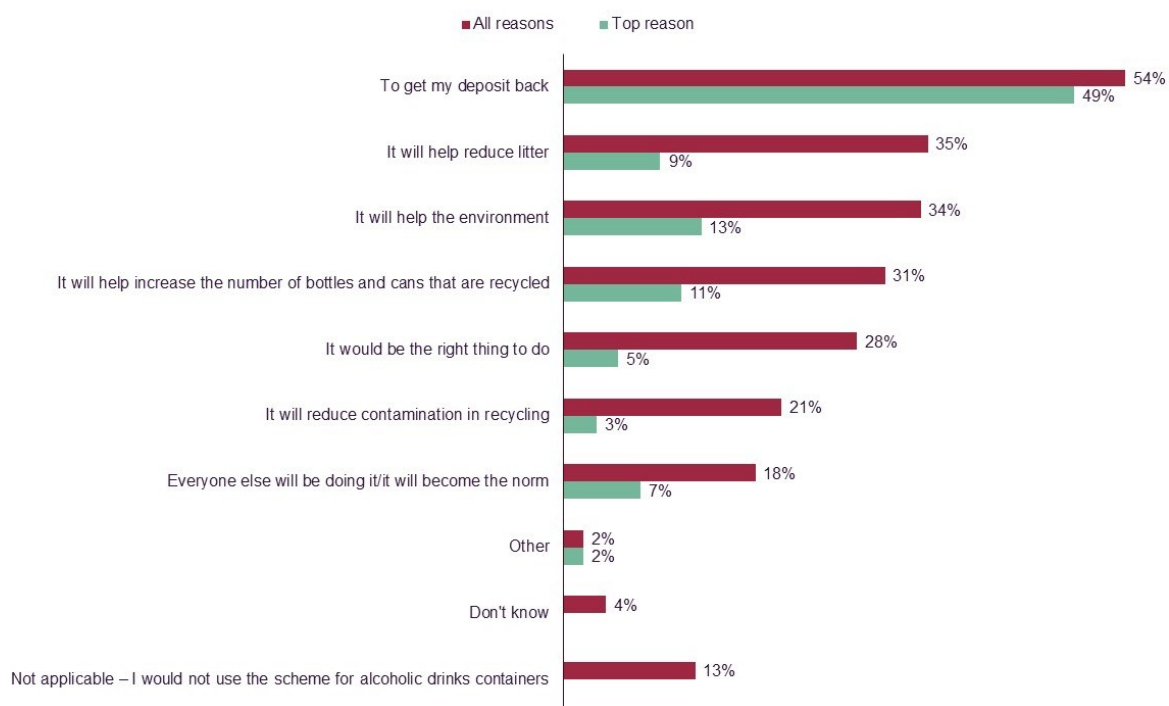
'That's embarrassing, I've got to take them to the shop as well, and they will count them out in front of me. What are they thinking? I've got to go into the shop with a load of beer cans, in front of all the shoppers.' Male, 35-54, harmful drinker

In the depth interviews harmful drinkers told us that they would manage this by going to return points when it was quiet or go to more anonymous places.

- 7.11 In terms of reasons for using the DRS, the top reason given by survey respondents was to get their deposits back (54%). Similarly, 49% stated it would be their single greatest reason for engaging with the DRS (see figure 7.10). Receipt of deposits was the main reason given amongst all age groups and drinker types. Other reasons for engaging with the scheme are similar to those given for feeling positive about it, including helping to reduce litter (35%), helping the environment (34%) and helping to increase the number of bottles and cans that are recycled.

²⁷ Question number Q72

Figure 7.10 Reasons for Engaging with the DRS



Base: Core sample, all drinkers 1011 Q73 Thinking about the Deposit Return Scheme in relation to the alcoholic drinks you buy from retailers. If you were to return containers through the DRS (rather than recycling/disposing in your normal way), what would be your reasons to do so?

7.12 With regards to how survey respondents thought they would use the vouchers provided when returning containers, most reported they would use them against grocery purchases, either by saving them up (40%), or using them straight away (16%). Harmful drinkers are significantly less likely to use vouchers for grocery purchases compared to moderate drinkers; 27% stating that they would save up vouchers to redeem against grocery purchases compared to 44% of moderate drinkers. Four in ten (40%) of the harmful drinkers said they would use vouchers against other alcohol purchases.

Table 7.5 How survey respondents expected they would use the vouchers

	Total	Male	Female	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income & Hazardous or Harmful drinker
I'd save them up to redeem against general grocery shopping	40%	37%	43%	39%	38%	42%	27%	37%	44%	30%
I'd save them up to redeem against other alcohol purchases	12%	13%	11%	16%	11%	10%	23%	15%	9%	16%
I'd return my containers, collect the voucher and use straight away against other grocery shopping	16%	15%	16%	18%	15%	15%	15%	19%	16%	19%
I'd return my containers, collect the voucher and use straight away against other alcohol purchases	7%	9%	5%	8%	7%	6%	17%	6%	4%	14%
Other	2%	1%	2%	1%	2%	2%	2%	1%	2%	2%
Don't know	10%	11%	10%	7%	13%	11%	9%	10%	11%	10%
Not applicable – I would not use the scheme for alcoholic drinks containers	13%	14%	12%	10%	14%	13%	9%	10%	14%	9%

Base: Core sample all drinkers 1011, Male (509), Female (497), 18-24 (276), 35-54 (315), 55+ (420), harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and hazardous or harmful incl. boost (208) Q71 Which of the following best describes what you think you would do with vouchers received for returning alcoholic drinks containers?

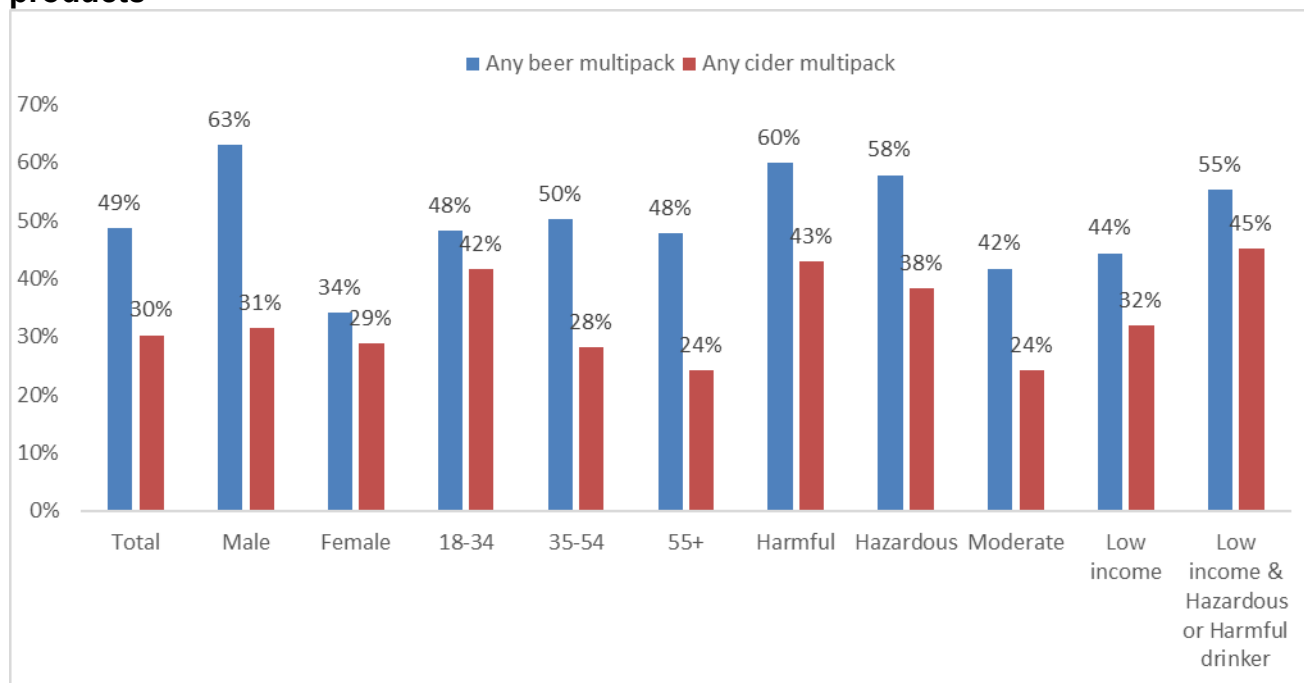
8. Impact on alcohol purchasing behaviours with the implementation of a DRS

- 8.1 The purpose of this section is to summarise the research findings around how (if at all) consumers anticipate they will change what alcohol they buy and consume, and the formats they buy it in with the introduction of the DRS. It will cover specifically the potential impact of the DRS on the purchasing of multipack lower alcohol content drinks, and to what extent, it might incentivise people to switch purchasing behaviour to stronger alcohol content drinks in single pack formats. Additionally, whether there are any variations in behaviour between those with different drinking levels or incomes (with a specific focus on hazardous and harmful drinkers and people on lower incomes). It will also explore the extent to which different deposit levels would be likely to impact alcohol purchasing behaviour.
- 8.2 Within the research, for each alcohol type and pack type respondents typically purchased, they were asked to indicate whether they would continue to buy the pack type (and if so, how they would dispose of it), switch to an alternative pack type or stop buying the alcohol type completely. This was tested in the context of a 20p deposit and 30p deposit separately. Deposit amounts were shown against each pack type, so participants were clear on exactly how much extra they would be paying at the point of purchase (although redeemable). For those who said they would switch pack type or alcohol type, follow up questions were asked around what they would switch to, and why.

Beer

- 8.3 Within the core sample (all drinkers), 63% reported drinking beer in the last 12 months. Beer had the highest penetration as a multipack alcohol type, as shown in figure 8.1, within the core sample, 49% of all drinkers reported normally purchasing multipack beer products, compared to 30% who bought cider multipacks. Men were significantly more likely to be buying multipack beer products (63%) than women (34%). Harmful and hazardous drinkers were also more likely to be buying multipack beer products, with 60% and 58% of all harmful and hazardous drinkers doing so respectively, compared to 42% of moderate drinkers.

Figure 8.1 Percentage of all drinkers who typically buy multipack beer or cider products

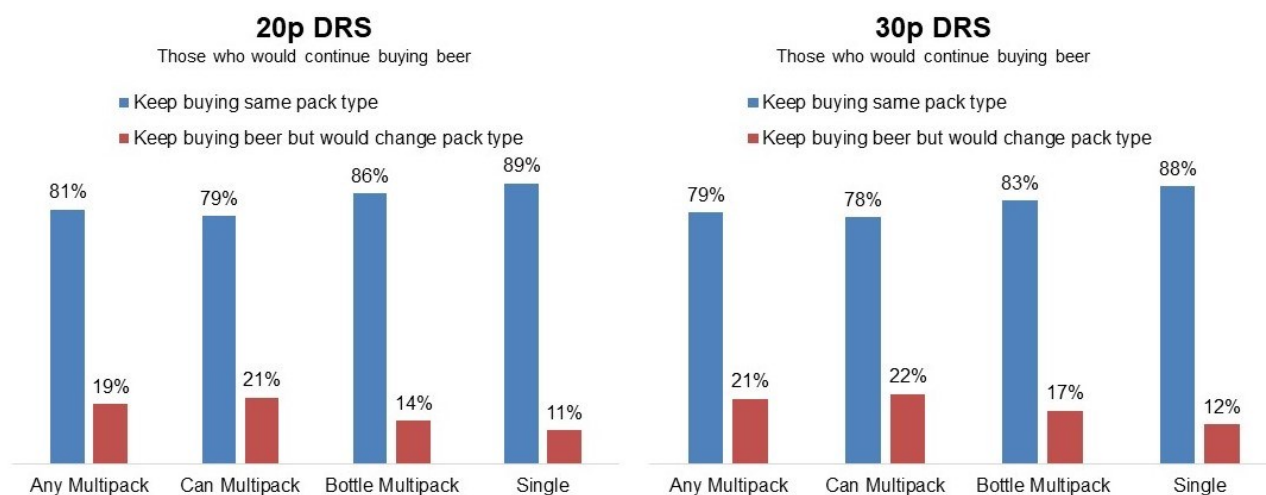


Base: Rebased to All drinkers Core sample 1011, Male (509), Female (497) 18-34 (276), 35-54 (315), 55+ (420) Harmful incl. boost (200), hazardous incl. boost (313), moderate (623) low-income incl. boost (559), low income and harmful or hazardous incl. boost (208) Q22 Thinking about the following types of alcohol you buy from retailers, what pack types do you typically buy these in. Please select all the pack types you typically buy.

8.4 With the introduction of the DRS, the vast majority (92%) of beer drinkers in the sample said they would continue drinking beer with a 20p DRS, dropping only slightly to 90% with a 30p DRS. Of those who would continue to buy beer, on average across multipack types²⁸ around four fifths would keep buying the same multipack types, with no statistically significant difference observed in intended behaviour if the deposit level was 20p or 30p (81% and 79%), as shown in Figure 8.2. There were no statistically significant differences in intended behaviour amongst hazardous or harmful drinkers or amongst lower income participants compared to the sample as a whole. With regards to single formats in beer, respondents were more likely to think they would stick with this pack type compared with multipacks; 89% (20p deposit) and 88% (30p deposit), intending to continue to buy the same single pack types.

²⁸ Multipack types shown Can Multipacks include - 4 x 440ml, 4 x 568ml, 10 x 440ml Glass Bottle Multipacks include 4 x 330ml , 12x330ml Single formats include single cans, single glass bottles 550ml, single glass bottle 660ml

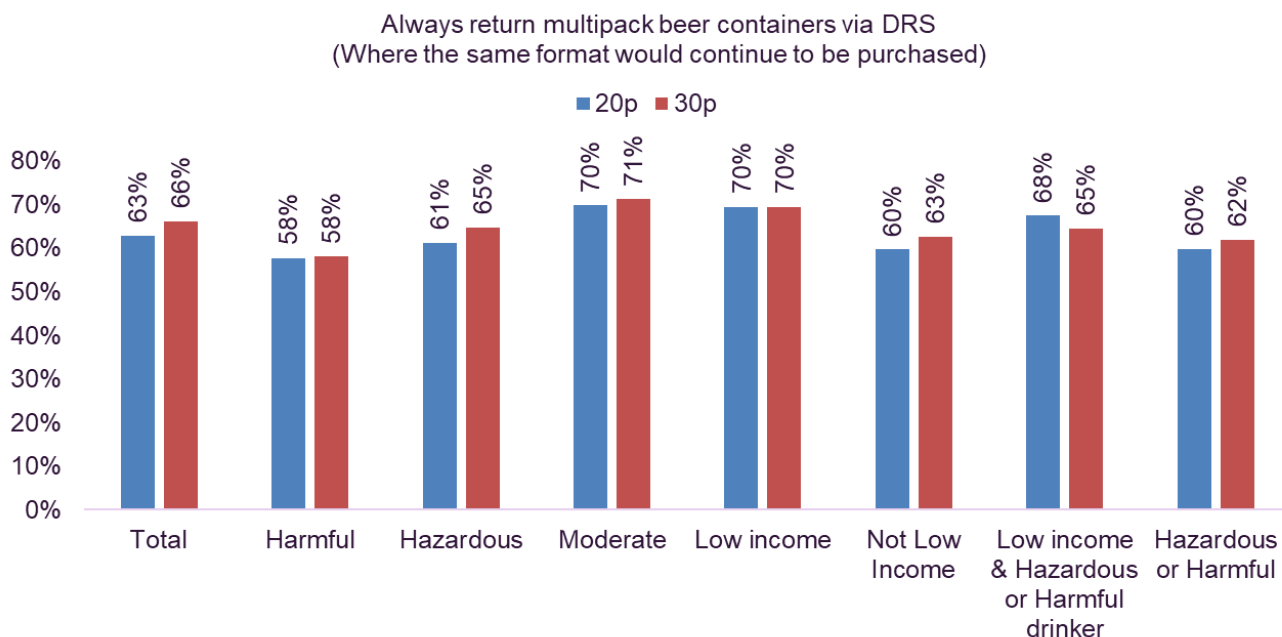
Figure 8.2 Expected beer buying behaviour with the introduction of the DRS: Purchasing intention for pack types



Base: Core sample (excl. boosts) Beer drinkers who would continue buying beer. 20p scenario 521 & 30p scenario 512 Q33 Thinking about the types of alcohol you buy from retailers and the packaging you buy it in, which option most closely describes what you would do with the introduction of a XXp Deposit Return Scheme?

8.5 In terms of recycling behaviours, deposit level (using the example of 20p and 30p) appears to have no influence on the propensity to return multipack beer cans or bottles within the DRS. Of those who said they would continue to buy beer multipacks, where the same format would continue to be purchased, on average 63% would always return containers via the DRS at 20p and 66% if it was 30p, as shown in figure 8.3 However, on average across the multipack types purchased, harmful or hazardous drinkers in the sample were less likely to indicate they would always return containers via the DRS compared to moderate drinkers. Amongst harmful drinkers 58% thought that they would always return containers with a 20p DRS, compared to 70% for moderate drinkers., and 58% and 71% for a 30p DRS respectively. Low income harmful or hazardous drinkers had a slightly higher propensity to always return containers via the DRS (68% at 20p), but lower income participants in general were more likely to indicate they would always return multipack beer containers compared to those on higher incomes (70% versus 60% at 20p).

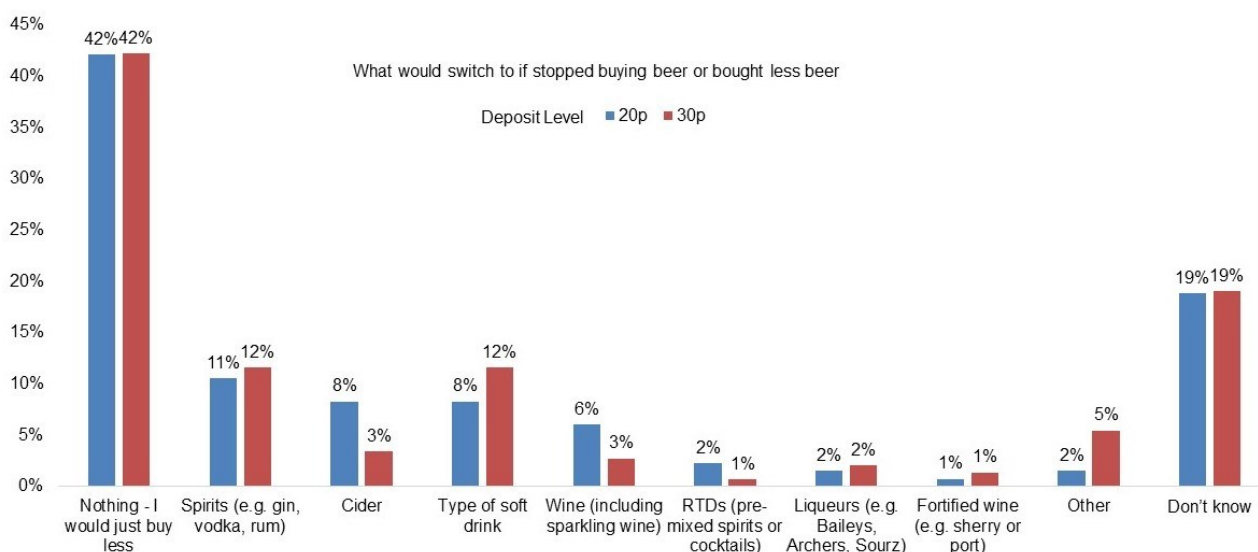
Figure 8.3 Intention to always return beer multipack containers where the same format would continue to be purchased



Base: Beer drinkers, who would continue to buy beer, average across formats where the same format would continue to be purchased 20p/30p 4x440ml cans (137/137), 10x440ml cans (117/115), 4x568ml cans (83/77), 4x330ml glass bottles (48/43), 12x330ml glass bottles (103/101) Q33 Thinking about the types of alcohol you buy from retailers and the packaging you buy it in, which option most closely describes what you would do with the introduction of a XXp Deposit Return Scheme?

8.6 In terms of the amount of beer consumers would buy, 66% of survey respondents who drank beer said that they would continue to buy the same amount of beer with the introduction of the DRS at 20p, and 63% if it was at 30p. However, 23% reported they would buy less beer or stop buying beer completely with a 20p deposit, rising to 26% if the deposit was set at 30p. Harmful drinkers were most likely to indicate that they would continue to buy the same amount of beer at 20p or 30p (72% for both deposit levels) than compared to moderate drinkers (64% at 20p and 59% for 30p).

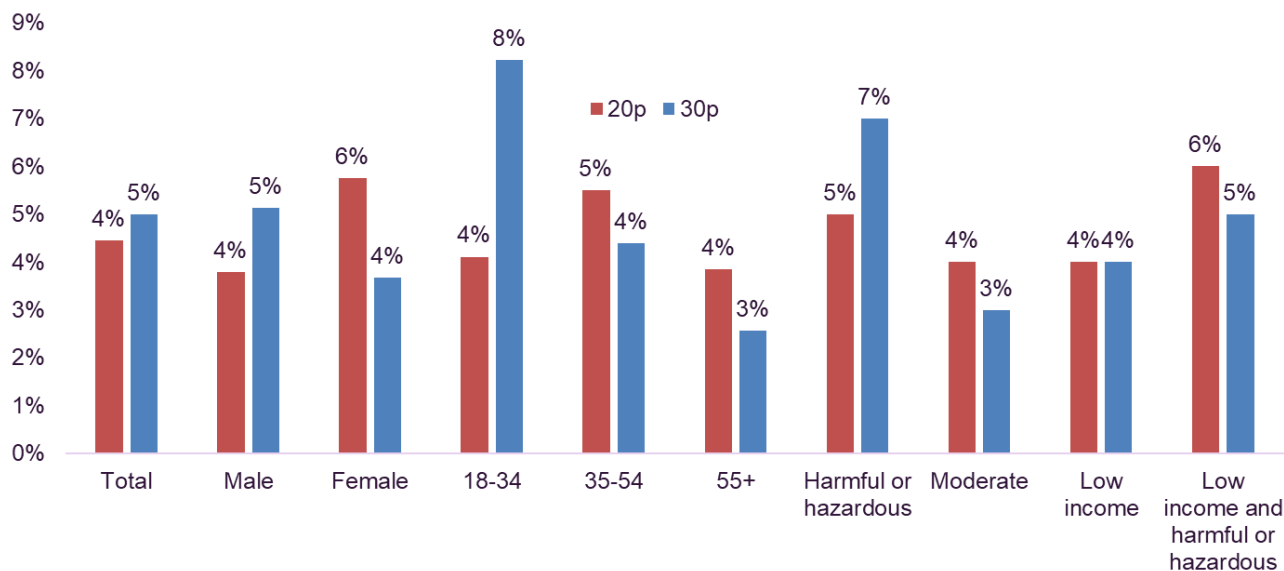
Figure 8.4 Of beer drinkers who would buy less beer or stop buying beer with the DRS, what they would switch into



Base Beer buyers who reported that they would buy less beer with the introduction of a DRS in response to question at (Q43x) And with the introduction of a 20p Deposit Return Scheme, how do you think this would influence how much beer you buy overall? Or if selected I'd stop buying it completely at Q33 Thinking about the types of alcohol you buy from retailers and the packaging you buy it in, which option most closely describes what you would do with the introduction of a XXp Deposit Return Scheme? 20p 133 & 30p 147 Reference in text Harmful or hazardous drinkers (73) Q35 With the introduction of a xxp deposit DRS scheme, you mentioned that you would buy less beer or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

8.7 Of the quarter (26%) of survey respondents indicating they would buy less beer or stop buying beer for a 30p deposit, around a fifth (20%/18%) reported that they would switch to higher alcohol single pack alcohol types (spirits, wine, liqueurs or fortified wine), as shown in Figure 8.4 This represents 4% and 5% of the total number of beer buyers in the survey for a 20p and 30p DRS respectively. A similar proportion of hazardous or harmful beer buyers (5% 20p and 7% at 30p) would switch into higher alcohol single pack alcohol types. At 7% this is significantly higher than for moderate drinkers (see Figure 8.5). However at 7% these hazardous or harmful beer drinkers are not significantly more likely to switch to higher strength drinks than beer drinkers as a whole. Respondents aged 18-34 were significantly more likely to indicate they would switch compared to those over the age of 55.

Figure 8.5 Proportion of all beer buyers in the survey who thought they would switch to single format high strength alcohol types (wine, spirits, liqueurs or fortified wine) from cider with the introduction of a DRS



Base: Rebased to all beer buyers, Total 562, Male (370), Female (191), 18-34 (146), 35-54 (182), 55+ (234), harmful or hazardous drinkers incl. boost (334), low income incl. boost 281, low income harmful & hazardous drinkers (126) Q35 & Q51 With the introduction of a 20p deposit DRS scheme, you mentioned that you would buy less beer or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

Reasons given for switching centre on alcohol value for money, convenience, or amount potentially lost if containers not returned (see Figure 8.6). A further fifth (19%) of those who indicated that they would buy less beer with the introduction of a DRS, were uncertain what they would do (whether they would switch to a different type of alcohol, buy a type of soft drink instead or buy nothing instead). Thus potentially a proportion of these could also switch into single format higher strength drinks. However, over 42% of all beer drinkers who felt they would buy less beer or stop buying it altogether with DRS, would not buy anything instead of beer.

Figure 8.6 Example reasons for switching from beer to spirits, wine, liqueurs or fortified wine with the introduction of DRS: Free text responses within survey

Hazardous or Harmful Drinkers	Low income
<p>'I would probably drink more spirits as the bottles would be easier to return'</p> <p>'Less money more alcohol'</p> <p>'Spirits with high alcohol level will satisfy me without many empty bottles at home'</p> <p>'Only one bottle to return rather than lots'</p> <p>'It's better value for money if you choose not to return the bottle you only losing 30p not £1.20 on 4 x cans. It's another way for the government to make money'</p>	<p>'Because I wouldn't be able to return the cans every time and over a longer period of time lose on a lot of my money'</p> <p>'As someone who is unable to travel, I would be unable to take the product back and I recycle all my stuff anyway so I would rather lose 30p on spirits than 3 pound on cans'</p> <p>'Beer would become unaffordable but a 30p charge on something you mix isn't as bad'</p>

Q Please could you let us know why you think you would buy....rather than beer, with the introduction of a 20p deposit return scheme?

8.8 An observation in Croatia and Estonia, reported in the literature review, was the move to bigger container sizes for beer with the introduction of a DRS (e.g., from 330ml to 568ml). Due to the small proportion of survey respondents who would switch to a different pack type as a result of the DRS, it is not possible to predict with certainty what the propensity to switch to a bigger container size would be. However harmful drinkers who buy beer, are already significantly more likely to be buying larger container sizes in can multipacks, 31% buying 4x568ml can packs compared to 14% of moderate beer drinkers (shown in Table 8.1).

Table 8.1 Percentage of beer drinkers buying each beer pack type

	Total	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income	Low income & Hazardous or Harmful drinker
Single cans	8%	12%	8%	6%	10%	5%	8%	8%	9%
Cans 4 x 440ml multipack	34%	38%	33%	32%	30%	30%	37%	39%	34%
Cans 4 x 568ml	21%	28%	24%	14%	31%	27%	14%	23%	33%
Cans 10 x 440ml multipack	28%	33%	32%	23%	34%	30%	26%	25%	29%
Single glass bottles 500ml	17%	13%	16%	20%	15%	13%	19%	13%	13%
Single glass bottles 660ml	8%	13%	10%	5%	8%	8%	8%	7%	8%
Glass bottles 12 x 330ml multipack	23%	24%	18%	27%	15%	27%	25%	20%	19%
Glass bottles 4 x 330ml multipack	11%	13%	11%	9%	6%	11%	12%	11%	10%

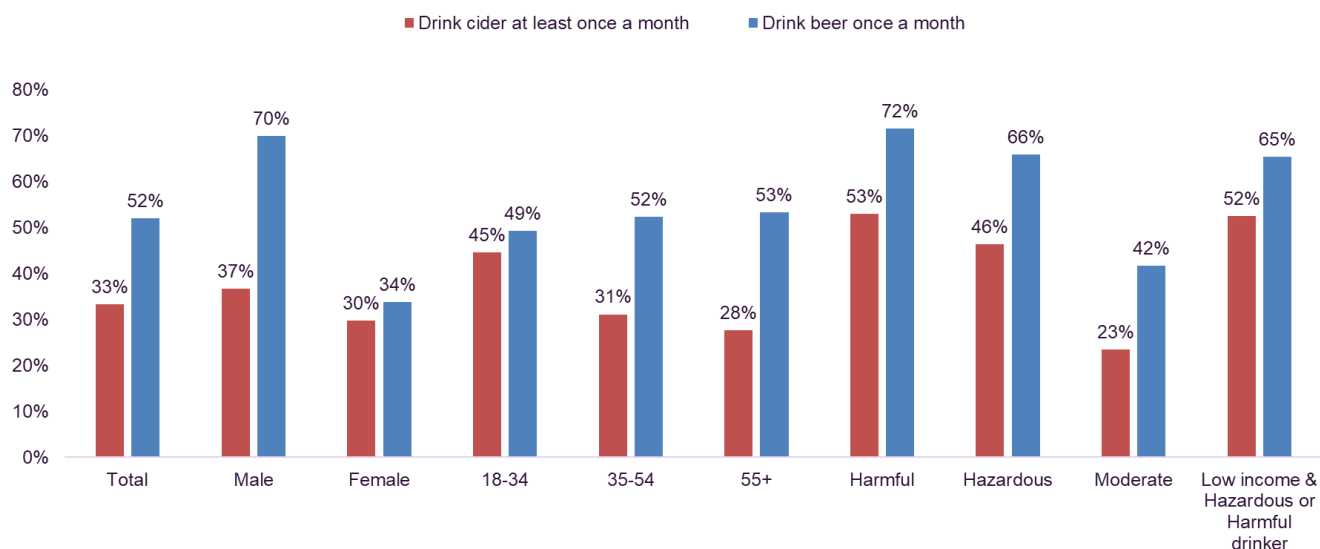
Base Beer buyers 566, Male (371), Female (194), 18-34 (146), 35-54 (184), 55+ (236), Harmful incl. boost (138), hazardous incl. boost (201), moderate (306), low income (283), low income and hazardous or harmful (127). Q22 Thinking about the following types of alcohol you buy from retailers, what pack types do you typically buy these in? Please select all the pack types you typically buy

Cider

8.9 Within the core sample (all drinkers), 46% reported drinking cider in the last 12 months. Cider was generally consumed less often within the sample compared to beer. As shown in Figure 8.7, across all types of cider (standard, flavoured, premium/vintage, and higher strength²⁹) 33% of the core sample were drinking cider at least once a month, compared to 52% who were drinking beer (standard or strong beer) at least once a month. Three in ten (30%) of all drinkers were buying cider multipacks (see Figure 8.1). Those aged 18-34 in the sample were statistically significantly more likely to be buying multipack cider products (42%) than those aged 35-54 (28%) or aged over 55 (24%). Harmful and hazardous drinkers are also more likely to be buying multipack cider products, with 43% and 38% doing so, compared to 24% of moderate drinkers.

²⁹ Standard cider – apple flavoured with a typical ABV of 4.5% to 5%, Fruit flavoured cider e.g. berry flavoured, Premium/Vintage ciders typically sold in glass bottles with higher ABVs 6%+, Higher strength ciders e.g. white ciders.

Figure 8.7 Percentage of survey respondents who drank cider and beer at least once a month



Base: All drinkers Core sample 1011, Male (509), Female (497) 18-34 (276), 35-54 (315), 55+ (420) Harmful incl. boost (200), hazardous incl. boost (313), moderate (623), low income and harmful or hazardous incl. boost (208) Q11 During the last 12 months, how often have you had a drink of the following types of cider? Q9 During the last 12 months, how often have you had a drink of the following types of beer?

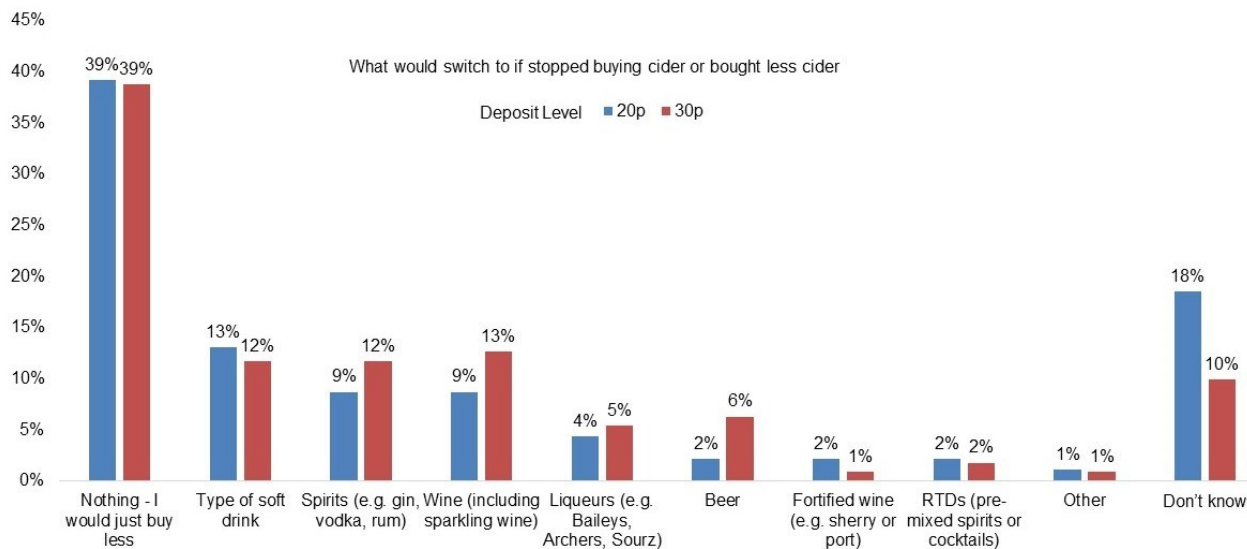
8.10 The vast majority (92%) of cider drinkers in the sample said they would continue drinking cider with the introduction of a 20p DRS, with a similar figure 91% for a 30p DRS³⁰. Of those who would continue to buy cider, on average across multipack types³¹ around four fifths would keep buying the same multipack types, with no statistically significant difference observed in intended behaviour if the deposit level was 20p or 30p (82% and 78%). There were no statistically significant differences in intended behaviour amongst hazardous or harmful drinkers or amongst lower income participants compared with the sample as a whole. As found for beer, respondents were slightly more likely to say they would stick with single formats than with multipacks (87% for 20p and 85% for a 30p deposit), but this difference is not statistically significant.

³⁰ Questions Q33C & Q49C in questionnaire

³¹ Multipack types included cans 4 x 330ml, cans 4 x 440ml, cans 4 x 568ml (pint), cans 10 x 440ml, cans 10 x 330ml multipack, Single formats, single glass bottle 500ml, single cans and plastic bottles 2 litres or 2.5 litres

- 8.11 Due to the relatively low number of respondents who thought they would buy a different pack type it is not possible to provide evidence around switching to other pack types.
- 8.12 In terms of the intent to recycle drinks containers, for cider there again appears to be no statistically significant difference if the deposit is set at 20p or 30p. Of those who said they would continue to buy cider, and in the same multipack format, on average 57% would always return containers via the DRS at 20p, with a similar proportion (58%) if it was 30p. However, on average across the multipack types purchased, harmful or hazardous drinkers in the sample were less likely to indicate that they would always return containers via the DRS compared to moderate drinkers (e.g., with a 20p deposit the proportions were 52% for harmful drinkers and 62% for moderate drinkers).
- 8.13 Within the sample, 18-34-year-olds were consuming cider most frequently, but this age group also had the lowest intention to return cider containers via the DRS. On average across the multipack types purchased, for a 20p deposit 42% of this age group reported they would always return multipack cider containers compared to 77% of those aged 55 or over. At 30p the proportions were similar, at 39% and 82% respectively.
- 8.14 With regards to the amount of cider consumers would buy, 64% of survey respondents who drank cider said that they would continue to buy the same amount of cider with the introduction of the DRS at 20p, and 57% if it was at 30p. However, 24% would buy less cider or stop buying cider completely with a 20p deposit, rising to 29% if the deposit was set at 30p. For cider, there were no statistically significant differences between drinker type or by affluence, but 18–34-year-olds (who drank cider most often) were significantly more likely to say they would buy less or stop buying it completely (39% compared to 20% of those aged 55 or over).

Figure 8.8 Of cider drinkers who would buy less cider or stop buying cider with the DRS, what they would switch into

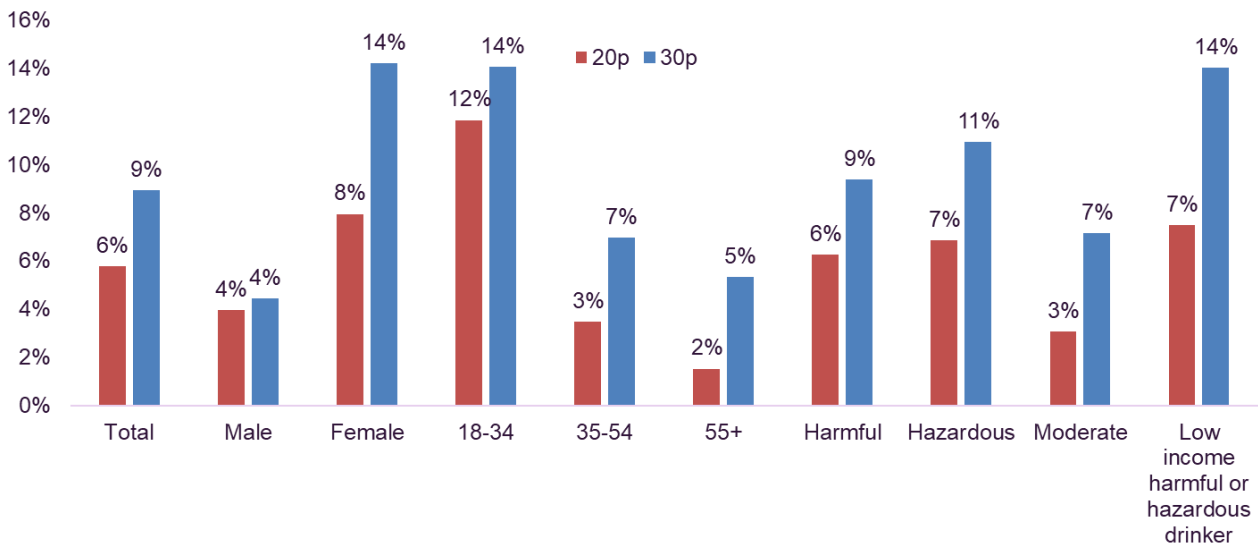


Base 92 & 111 Q38 & Q54 With the introduction of an xxp deposit DRS scheme, you mentioned that you would buy less cider or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

8.15 Figure 8.8 shows that of those who indicated that they would buy less cider or stop buying cider completely, around a quarter indicated they would switch (partially or fully) to higher alcohol single pack alcohol types (spirits, wine, liqueurs or fortified wine). Although base sizes are relatively low (92 and 111 reporting respectively) the research suggests that of those who reported that they would buy less cider or stop buying cider completely, 24% would switch to higher alcohol types with a 20p DRS and 31% with a 30p DRS. At a 20p DRS this represents 6% of the total number of cider buyers in the survey, and at 30p 9%. Respondents in the survey were provided with a free text box to indicate why they would switch. Of the reasons given, these seem to centre on affordability, as shown in Figure 8.10. There were no statistically significant differences for harmful or hazardous drinkers in terms of intention to switch to spirits, wine, liqueurs or fortified wine (from cider) at a total level, although at 30p there is a significant difference between survey participants who are both low income and harmful and hazardous drinkers compared to moderate drinkers of any income. As shown in Figure 8.9, at 30p cider drinkers

aged 18-34 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 18–34-year-olds versus 7% of 35–54-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).

Figure 8.9 Proportion of all cider buyers in the survey who thought they would switch to single format high strength alcohol types (wine, spirits, liqueurs or fortified wine) from cider with the introduction of DRS



Base: Rebased to core sample, all cider buyers 381, Male (202), Female (176), 18-34 (135), 35-54 (115), 55+ (131), Harmful incl. boost (96), Hazardous incl. boost (146), Moderate (196), Low income harmful or hazardous drinker incl. boost (107)

8.16 Of those who indicated that they would buy less cider or stop buying it completely, a further 18% (20p DRS) and 10% (30p DRS) were uncertain what they would do (whether they would switch to a different type of alcohol, buy a type of soft drink instead or buy nothing instead). Thus potentially a proportion of these could also switch into single format higher strength drinks.

Figure 8.10 Example reasons for switching from cider to spirits, wine, liqueurs or fortified wine with the introduction of DRS. Free text responses in the survey.

Hazardous or Harmful Drinkers

‘20p per bottle is ok whilst 20p per can adds up to a lot’ (and low income)

‘Because it would be less money to lose if I couldn’t return the bottle’

‘While £1.30 extra for only 4 cans is not worth the little amount of alcohol, but just 30p for a spirit is a lot more affordable’ (and low income)

‘The deposit is a lower percentage of the price’

Selected free text responses to question Q39 & Q55 Please could you let us know why you think you would buyrather than cider, with the introduction of a xxp deposit return scheme?

Wine

- 8.17 Within the core survey sample (all drinkers), 59% reported drinking wine in the previous 12 months. Of the survey respondents, 43% drank wine at least once a month (as shown in Figure 5.2), with older adults (aged 55 or over) most likely to be doing so (52% compared to 37% of those aged 18-34 and 36% of 35-to-54-year-olds). Harmful and hazardous drinkers were also more likely to be consuming wine regularly, 64% and 57% respectively reporting to consume wine at least once a month compared to 33% of moderate drinkers (with 57% and 43% consuming wine at least once a week compared to 16% of moderate drinkers). Although lower income drinkers overall had a lower propensity to be drinking wine at least once a month (39%), 54% of lower income harmful or hazardous drinkers were doing so.
- 8.18 Within the survey sample, nine in ten (91%) wine drinkers were buying 75cl single bottles (see Table 8.2), while small bottles/cans (c. 18.7cl – 20cl) and boxes had significantly lower penetration (10% and 5%, respectively). Boxed wine would be exempt from the DRS, and for small bottles the DRS deposit would account for a greater proportion of the total point of purchase price compared to a standard bottle (75cl). Harmful drinkers had a slightly higher propensity to be buying boxed wine (11% compared to 3% of the moderate drinkers), and those aged 18-34 were significantly more likely to be buying small bottles and cans (19% compared to 4% of those aged 55 or over).

Table 8.2 Proportion of wine buyers in the survey buying wine pack formats

	Total	Male	Female	18-34	35-54	55+	Harmful	Hazardous	Moderate	Low income & Hazardous or Harmful drinker
Standard bottles (75cl)	91%	92%	91%	84%	90%	95%	83%	88%	94%	88%
Small bottles or cans (18.7cl – 20cl)	10%	7%	12%	19%	13%	4%	16%	11%	8%	13%
Boxes (2.25 litres)	5%	5%	5%	3%	6%	6%	11%	5%	3%	4%

Base: Wine buyers 511, Male (225), Female (285), 18-34 (122), 35-54 (139), 55+ (250), Harmful incl. boost (132), Hazardous incl. boost (189), Moderate (263), Low income harmful or hazardous drinker incl. boost (120)

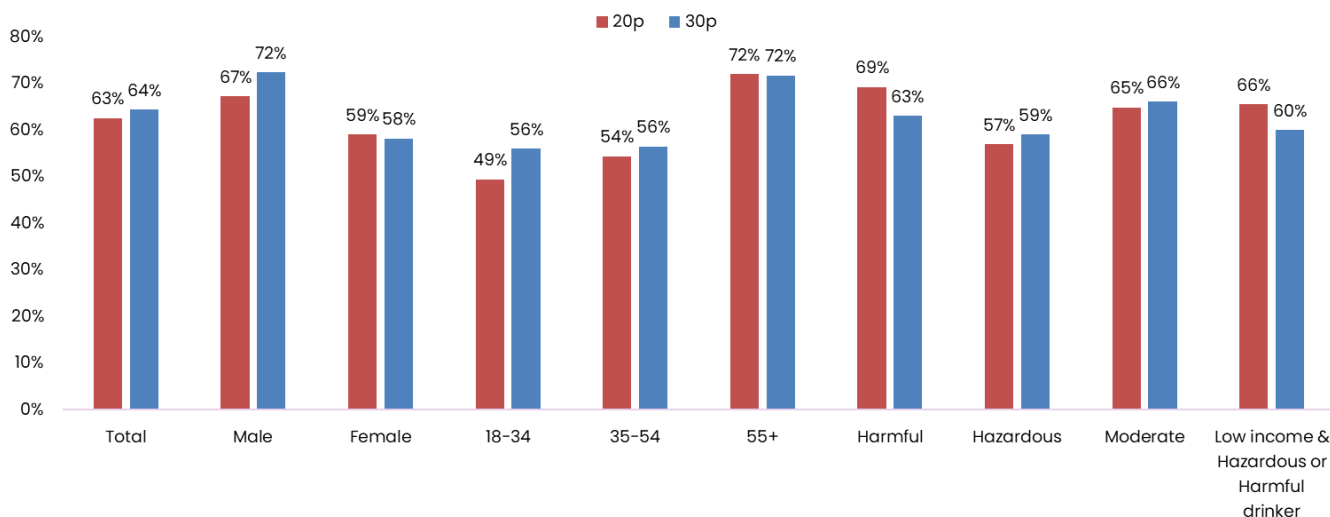
8.19 With the introduction of a 20p DRS, 95% of wine drinkers in the survey indicated they would continue to buy wine, with a similar proportion (94%) if the deposit level was 30p. Of those who would continue to buy wine, 88% would continue to buy standard wine bottles with a 20p DRS and 85% with a 30p DRS. There were no statistically significant differences in intended behaviour amongst hazardous or harmful drinkers or amongst lower income participants than compared to the sample as a whole. Due to the low penetration of small bottles and cans it is not possible to report on intended behaviour with this format. Although base sizes are very low, thus a high degree of caution needs to be applied, directionally the data suggests that some 75cl bottle buyers may switch to boxed. Of the 54 in the survey sample (at 20p DRS) who said they would buy a different pack type to 75cl bottles of wine, 30 thought they would switch to boxes of wine instead³² (the others were mainly undecided, 18 respondents). For a 30p DRS the figures are similar 34 of the 67 thought they would switch to boxes of wine with 25 undecided.

8.20 In terms of intent to recycle bottles, for wine there again appears to be no statistically significant difference between whether the deposit is set at 20p or 30p. Of those who said they would continue to buy wine, and standard wine bottles, on average 63% would always return containers via the DRS at 20p and 64% if it was 30p (see Figure 8.11) As found with other alcohol types, the propensity to return

³² Questions Q40 & Q56

containers via the DRS was statistically significantly lower amongst those aged 18-34, 49% intending to do so with a 20p DRS compared to 72% of respondents aged 55 years or over. Although, the difference is statistically significant some caution needs to be applied to the 18-34 sample due to the low base size (81). There are no statistically significant differences in propensity to return via the DRS by drinking level or affluence.

Figure 8.11 Wine drinkers intention to always return 75cl wine bottles where the same format would continue to be purchased

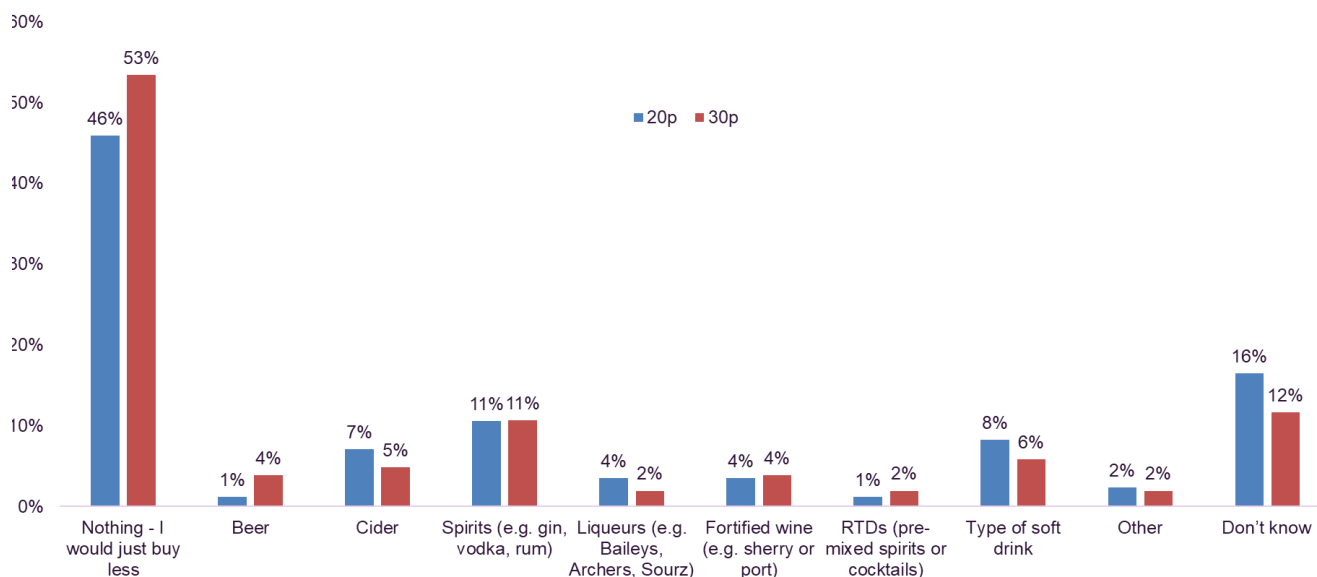


Base: Wine drinkers who buy 75cl bottles and would continue to do so with the introduction of the DRS. Total 20p DRS 387/370, Male (174/166), Female (212/203), 18-34 (81/75), 35-54 (103/101), 55+ (203/194), harmful incl. boost (91/91), Hazardous incl. boost (130/123), moderate (213), low income & harmful or hazardous drinker incl. boost (87/85) Q33 & Q49 Thinking about the types of alcohol you buy from retailers and the types of packs you buy it in, which option most closely describes what you would do with the introduction of a xp Deposit Return Scheme?

8.21 Around one in ten (12%) of wine drinkers thought they would buy less wine with a 20p DRS, rising slightly to 15% if set at 30p³³. A further 5% and 6%, for 20p and 30p, respectively, thought they would stop doing so altogether. There were no significant differences by drinking level, affluence or age. Directionally, of those who thought they would buy less or stop, most would just buy nothing instead of wine (46% for a 20p DRS and 53% for 30p) (although some caution needs to be applied to this as base sizes are relatively low due to the small number of wine drinkers who would stop or buy less wine) As shown in Figure 8.12, some one in ten(11%) thought they would switch to spirits, (at 20p & 30p) but this represents 2% of wine drinkers in the sample as a whole.

³³ Question Q40X & Q56X

Figure 8.12 Of wine drinkers who would buy less wine or stop buying wine with the DRS, what they would switch into



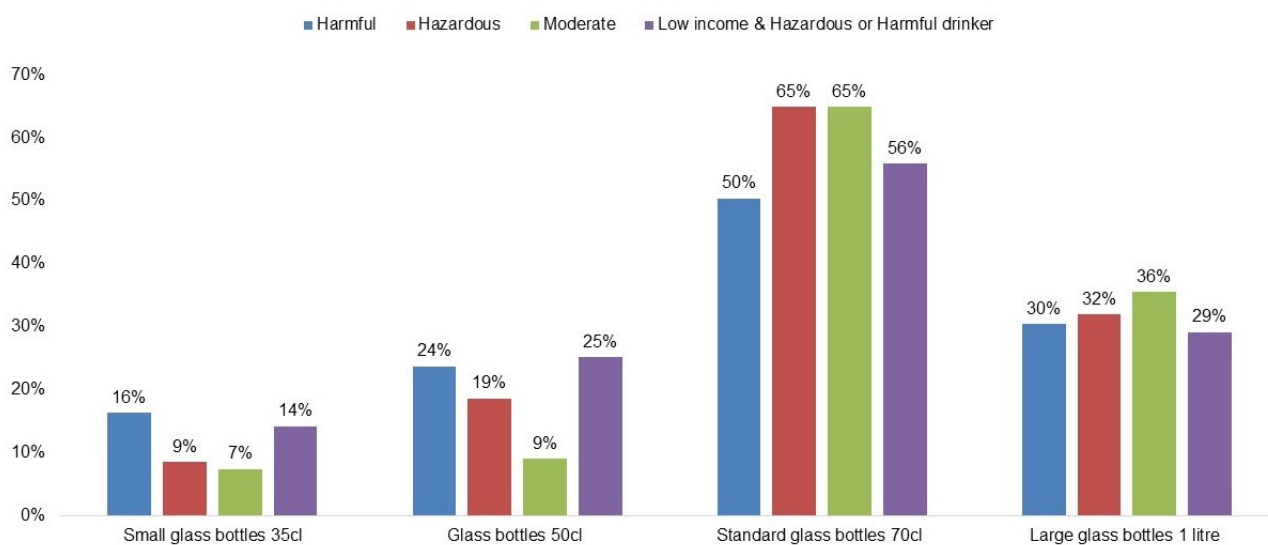
Base: Wine drinkers who would buy less wine or stop buying wine with the introduction of the DRS 20p (85) 30p (103) Q41 or Q57 With the introduction of a xxp deposit DRS scheme, you mentioned that you would buy less wine or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

Spirits, liqueurs and fortified wine

8.22 Within the total sample, 59% had drunk spirits in the last 12 months, and 43% were consuming spirits at least once a month. Liqueurs and fortified wines were consumed much less often, 9% and 5% respectively on a monthly basis, as shown in Table 5.2.

8.23 The most popular format within the sample, for spirits, liqueurs or fortified wine was 70cl bottles, 62% buying this sized bottle. However, harmful drinkers are significantly more likely than moderate drinkers to be buying smaller bottles (see figure 8.13). A hypothesis is that buying spirits, liqueurs, or fortified wines more frequently than moderate drinkers, they are choosing to buy less but more often due to affordability, but further research would be required to evidence this Around half (53%) of harmful drinkers report buying spirits at least 2 or 3 times a month.

Figure 8.13 Bottle types typically purchased for spirits, liqueurs or fortified wines



Base Harmful incl. boost (135), hazardous incl. boost (188), Moderate incl. boost (256), low income harmful or hazardous drinker (127)
 Q22 Thinking about the following types of alcohol you buy from retailers, what pack types do you typically buy these in?

8.24 With the introduction of a 20p or 30p DRS, 95% of spirits, liqueur or fortified wine drinkers would continue to buy these drink types. The research provided no evidence that harmful drinkers would be more likely to switch into larger bottles with the introduction of DRS. In terms of intent to recycle, of those who would continue to buy 70cl bottles, 53% thought they would always use the DRS to recycle these.

9. Conclusions

- 9.1 The core aim of the research was to understand to what extent the introduction of a Deposit Return Scheme (DRS) may impact alcohol purchasing behaviours in Wales, and specifically how it may impact on the aims of the Minimum Price for Alcohol legislation. This latter question relates to the potential risk that lower alcohol multipack alcohol types (beer and cider) are seen as offering less value compared to higher strength single format alcohol types (such as wine, spirits, liqueurs or fortified wine) as the DRS is applied to each container. Two groups that were identified as potentially being most at risk to changing alcohol purchasing behaviours as a result of DRS were hazardous and harmful drinkers, and people on lower incomes.
- 9.2 The research suggests that a minority of consumers who are buying beer or cider may switch into higher strength alcohol types (fully or partly) with the introduction of a DRS, with fewer than 10% of beer or cider drinkers in the quantitative research indicating that they would do so. This was also true for harmful and hazardous drinkers, and those on lower incomes at a total level. Although was slightly higher for cider buyers who were drinking at a harmful or hazardous level and were also on a low income at a 30p DRS.
- 9.3 The research suggests there a number of key reasons driving this:
- Types of alcoholic drink 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 require a change from existing norms (source: qualitative research).
 - Most drinkers in the research were found to have a relatively limited repertoire of alcohol types they consume on a regular basis and over 80% 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 again 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 for harmful drinkers than for moderate (source: qualitative research and quantitative research).

- When shopping for alcohol, current behaviour tends to be to shop within rather than across types (source: qualitative research).

9.4 Supporting this conclusion is that, despite the number of operational DRSs around the world, there is no evidence of significant unintended effects on alcohol consumption. Ultimately, studies indicate that a well-designed DRS should have no impact on consumer behaviour as deposits are refundable. If consumers are able to fully engage with the scheme and easily reclaim their deposit, then there is less likely to be unintended consequences from a DRS being implemented. The importance of implementation, highlights that ongoing monitoring and evaluation of the DRS, of both the process (implementation) and outcome will be important (as well as continued evidence gathering from schemes elsewhere).

9.5 The research has highlighted some areas, however, that will help facilitate the returning of containers and thus lessening the risk of negative changes in purchasing habits.

- Harmful drinkers in particular expressed a concern that people might judge them based on the volume of drinks containers returned. Around two in five (43%) of harmful drinkers and 35% of hazardous agreed with the statement ‘I would worry that other people would judge me based on the number or types of alcohol containers I might return’. Machines that enabled discreet deposits may encourage this group to return.
- On vouchers versus cash, there was a preference for cash to be returned rather than vouchers, in part due to a concern about vouchers being lost or having an expiry, for example. Thus, digital vouchers may help some feel more confident that money would not be lost inadvertently.
- Having the time to return was considered a barrier, particularly amongst adults with children and those aged 18-34 years old. Communications around the ease and speed of returning, coupled with widespread return points (so people do not feel they need to go out of their way) may lessen

this concern. Also ensuring that return points are operational will be an important consideration.

- There was a clear correlation between those who had a negative view of the DRS and having unanswered questions about the scheme, suggesting that clear and comprehensive communications will be important in encouraging drinkers to feel positive about the scheme.
- 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. This is reinforced by the need to carry around empty, messy, drinks containers out of home also being highlighted as a key barrier to returning containers.

9.6 Although the focus of the research was to highlight any unintended consequences in terms of alcohol purchasing behaviour amongst hazardous or harmful drinkers, or those on a low income, the research highlighted another group that it may be relevant to monitor post DRS implementation. In both the qualitative and quantitative research, it was evident that 18–34-year-olds currently had the lowest propensity to recycle and also had the lowest intention to return containers via the DRS. This was particularly for when retail purchased alcohol was being consumed out of home. Currently only 30% of participants aged 18-34 reported always bringing empty drink containers home to be recycled when consumed out of home compared to 51% of those aged over 55³⁴. With the introduction of a DRS within beer, on average across the multipack types purchased, for a 20p deposit 60% of 18–34-year-olds reported they would always return multipack containers compared to 70% of those aged 55 or over. If deposits are not being reclaimed there is a greater potential risk of switching from lower alcohol multipack alcohol types to stronger drinks.

³⁴ Figure 6.1

10. Recommendations for future research

- 10.1 The findings in this report provide evidence of how drinkers may behave in terms of their alcohol purchasing behaviours with the introduction of a Deposit Return Scheme. However, there may be a need to monitor actual behaviours post implementation. Our recommendation for how this could be achieved is outlined below and suggests a mixed methods approach, using both category data and additional quantitative research.
- 10.2 In terms of timing, we feel that it will be important to let consumers adjust to the new scheme before any post evaluation begins. In addition, based on our recommendation to use category data in part, it would be advantageous to have at least a full year's worth of data in order draw reliable conclusions.

Category data

- 10.3 In order to understand to what extent consumers are switching (if at all) from lower alcohol multipack alcohol types (beer and cider) to higher strength single format alcohol types (spirits, wine, liqueurs, fortified wine), we would recommend the Welsh Government purchases some category data. There are a number of ways this could be approached.
- A detailed approach would be to buy account level (retailer level) sales data for key alcohol types for perhaps two supermarkets and a convenience retailer. This would enable analysis of each retailer in isolation, to see what is happening to base sales of alcohol once promotions are taken account of (promotions undertaken at a retailer level). This approach would also enable analysis on pack types to be undertaken to understand if buyers are switching into larger container sizes. The challenge with this method would potentially be cost and gaining the necessary publishing permissions from data houses.
 - An alternative method would be to analyse total category data for each alcohol types to understand changes to sales volumes, switching and formats.

- Buy retailer loyalty card data. This will enable the analysis of product interactions, switching, category arrivals and departures, and how different shopper segments are behaving. Again there may be challenges with gaining permissions to publish this data.

Alongside the category data it will also be relevant to continue to monitor the effects of the implementation of Deposit Return Schemes in other countries in terms of drinking behaviour, but also to understand best practice for implementation.

Research with drinkers

- 10.4 While category data will provide a good read with regards to what is happening at a total Welsh market level, it will not provide insights into the behaviour specifically on those to whom the MPA legislation is targeted i.e., hazardous and harmful drinkers, or those for whom the additional point of purchase price could prove more challenging, i.e., lower income consumers. Thus, to complement category data, it is recommended the Welsh Government undertake a follow-up piece of qualitative and quantitative consumer research with drinkers. An initial piece of qualitative research to understand the experience of implementation from the consumers point of view. It is recommended that the sample again includes a range of drinker types (moderate, hazardous and harmful), income levels, age and gender, and location (e.g. rural or urban). For the quantitative research we would recommend using the same sample structure as used in this pre-implementation research. A core sample of Welsh alcohol drinkers, plus boosts of harmful drinkers, hazardous drinkers, lower income drinkers, and low income harmful and hazardous drinkers, to ensure that these groups can be analysed independently. The content would be centred on their experiences of DRS as alcohol consumers, and if they have made any changes to what they buy and drink as a result, and why. It would be important for this to be understood in the context of retail purchased alcohol when consumed out of home and at home separately, due to the current differences in recycling rates in these locations. Within this research it will also be important to draw out behaviours of 18–34-year-olds, as this group was identified as potentially having the lowest

intention to engage with the DRS. Thus, an additional boost of this age group could be considered.

Research with scheme operators

- 10.5 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.

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Annex A Depth Interview Guide

Introduction 3 mins (3)

Introduction

Thank for taking part

Introduce moderator & Levercliff (an independent research agency)

Research is being conducted on behalf of the Welsh Government to explore the impact of a Deposit Return Scheme (DRS) on alcohol purchasing behaviours

Interview last about an hour

Explain that Levercliff's independence means they should be free to express opinions. Research is confidential and anonymous – your personal details will not be shared and although a report will be published no one will be identified within that. Research is voluntary – you can stop participating any time. The information will be used for research purposes only

There are no right or wrong answers. Looking for you to be open & honest

Recording

Ask participant for permission to record, then start recording and confirm consent. This is only so I don't need to take notes. After I've listed back to it, it will be deleted.

Any questions?

Warm-up 4 mins (7)

(Aim: Warm-up and to gain a very high-level overview of alcohol purchased (more detailed covered in part 5)

Participant introduction

-Name, if working what they do for a living, anyone else at home.

-Where do you normally shop for groceries and where do they shop for alcoholic drinks, and why?

What types of alcohol drinks do you currently buy and drink?

How do you decide what to buy? (Brand, ABV, pack price, offers, money in pocket)

Budgets & Finances 5 mins (12)

(Aim: To understand potential influence of budgets, e.g. ability to defer deposit amount being returned and/or need to return)

With inflation, there have been a lot of price rises over the last year or so. How do you manage how much you spend on food & drink

-An overall budget, budgets for different areas, sticking to shopping lists etc). Where does alcohol fit in?

Have you made any changes to the types of alcoholic drinks you have been buying as a result, or how you shop for them?

DRS Awareness & opinions 10 mins (22)

(Aim: To explore awareness and understanding of DRS amongst drinkers)

Moderator to explain that the Welsh Government, (alongside the Scottish Government & UK Government in England) is working on a new approach to recycling drinks containers, called a Deposit Return Scheme or DRS.

What do you do with empty bottles and cans at the moment [moderator to clarify any type of drink; soft drinks or alcoholic]? (Talk me through it, where do you store them, how do you dispose of them?)

-How does it vary by type of container (cans, glass bottles (sizes), plastic bottles)

-How does it vary by occasion/situation? (Home, out of home)

-Any circumstances when it's more difficult to recycle?

-Is there anything that you find frustrating or annoying about storing or disposing of bottles & cans at the moment?

[Following general discussion, moderator to explore each of the above themes again to draw out any differences for empty alcohol bottles and cans vs. soft drinks]

Had they heard of DRS before being contacted about this research?

-If yes, can you describe it in your own words?

-Have they any experience of something similar (if so where, how did they feel?)

Moderator to show overview of DRS [slide 1]

What are your initial thoughts?

-How do you feel about something like this being introduced? (Why?)

-Any immediate questions?

-Any immediate concerns?

Imagine it was introduced, what do you think you personally would do? [Moderator to gather initial spontaneous thoughts and refer to previous comments].

-What things might make it difficult for you personally (explore each of collecting, transporting, redeeming)

-[If participant resistant] When we are asked to do something new, it often takes time to adjust. Thinking about maybe 5 years down the line, can you imagine it's something that you will settle in to? (Why/why not) – [e.g. taking carrier bags]

-What would make you more likely to return containers (deposit amount, convenience etc)

-How do you feel about people seeing what you have been drinking at the redemption point?

How do you think other people will react to it? (Why?) (Short term & longer term)

-Are there certain people you think it will be more difficult for? Why?

Alcohol Types 8 mins (30)

Aim: Background to understand current drink choices

I'm going to show you some examples a bit later of what a deposit return fee would look like when it's added to products, but before that just to get a bit of background.

Earlier you mentioned that you normally buy the following types of alcohol.....Can you tell me about why you choose different types of alcohol. E.g. do you drink different types in different situations or occasions?

-Are there any others you didn't mention earlier (when & why bought)

And can you talk to me in a bit more detail about how you decide what to buy?

-What is decided before going to the shop or at the shop? What does it depend on?

-How do you decide what to buy? (Why is that important) [ABV, brand, etc]

-Scenarios where might switch types?

-Scenarios where might switch pack type/size?

-Role of & influence of available budget in choice

What type of packs do you buy these in? (Ask for each alcohol type)

-What do they like about this pack type?

-Why this that important to you?

How do you decide what pack type to buy?

-Price per litre/unit, occasion, experience

-Control of how much consumed?

MUP 4 mins (34)

Aim: Explore conscious awareness & impact of MUP

You may be aware that a few years ago another scheme was introduced in Wales, called minimum unit pricing for alcohol Have you heard of this?

[If yes] In your own words, can you explain to me what it is?

-What did you notice when it was introduced?

Moderator: The introduction of minimum unit pricing means that alcohol cannot be sold at less than 50p per unit. It was introduced as part of a number of policies to help tackle the harm caused by alcohol. For example, the minimum price for a 4 pack of 440ml cans of 5%

ABV lager or cider would be £4.40. Without minimum unit pricing the same product could be sold for less.

Has minimum unit pricing for alcohol had any impact on the types of alcoholic drinks you buy or where you buy it from? Can you tell me more about that? [Moderator to probe for changes]

DRS Scenarios, Behaviour Mapping 21 mins (55)

Aim: To explore potential behaviour change in what purchased, and if any stronger products chosen (as a result of DRS) would be consumed at same rate as lower ones.

Moderator to explain that we would now like to explore what impact the introduction of a DRS scheme might have on their shopping behaviour.

From what I've told you so far, how do you think the introduction of a Deposit Return Scheme, might influence what alcohol you buy, or the types of packs you buy it in?

Moderator to introduce scenarios using introduction slide [slide 2]. Ask participant if they have any questions before we begin.

Show scenario 1 [slide 3]: Current (5 mins)

[Moderator to allow respondent time to look at the options]

Which is most appealing overall

-Can you describe to me what made you choose this one over the others (favourite type, ABV, shelf price, price per litre etc)

[Moderator to refer back to drinking & purchasing occasions referenced earlier] which would you choose in the situations you mentioned earlier...

-Can you explain to me why you would be more likely to choose [product] then

[For the one chosen] And how would you normally drink this, maybe tell me about the last time you bought

Show scenario 2 [slide 4]: DRS at 20p (10 mins)

[Moderator to allow respondent time to look at the options]

Which is now most appealing overall [probe for reasons]

-[If they chose a different product to the first scenario] can you talk me through why you chose this product rather than the one you picked last time?

-Can you describe to me what made you choose this one over the others (favourite type, ABV, shelf price, price per litre etc)

[Moderator to refer back to drinking & purchasing occasions referenced earlier] which would you choose now in the situations you mentioned earlier... (& why?)

-Can you explain to me why you would be more likely to choose [product] then

What about the returnable deposit? (At this amount would you return the packaging)

-Which ones would you return (any you wouldn't). What might it depend upon?

You mentioned that you would buy_____ How would you drink this [probe for amount consumed]

Overall what differences do you notice?

With the introduction of a 20p deposit on drinks containers the price on the shelf for multipacks has increased more than for a single bottle for example. E.g. the shelf price for the 10 pack of beer has increased by £2.00 but only 20p for a bottle of vodka or wine.

However the deposit of £2 or 20p would be returnable. How do you feel this would change what you buy?

Show scenario 3 [slide 5]: DRS at 30p (6 mins)

[Moderator to allow respondent to look at the options]

Which is now most appealing overall [probe for reasons]

-[If they chose a different product to the first or second scenario] can you talk me through why you chose this product rather than the one you picked before.....?

-Can you describe to me what made you choose this one over the others (favourite type, ABV, shelf price, price per litre etc)

[Moderator to refer back to drinking & purchasing occasions referenced earlier] which would you choose now in the situations you mentioned earlier... (& why?)

-Can you explain to me why you would be more likely to choose [product] then
What about the returnable deposit? (At this amount would you return the packaging)
-Which ones would you return (any you wouldn't). What might it depend upon?
You mentioned that you would buy_____ How would you drink this [probe for amount
consumed] When, where, who with, how much?
Overall what differences do you notice?
With the introduction of a 30p deposit on drinks containers the price on the shelf for
multipacks has increased even more. E.g. the shelf price for the 10 pack of beer has
increased by £3.00 but only 30p for a bottle of vodka or wine. However the deposit of £3 or
30p would be returnable. How do you feel this would change what you buy?

Behaviour Impact Mapping Part Two & Close 5 mins (60)

Aim: Overall behavioural impact reflection

Imagine it was introduced tomorrow, in summary how do you feel what you buy will change?

(If at all) – pack types, alcohol types

-Amount you buy will change? (If at all)

And in 5 years...

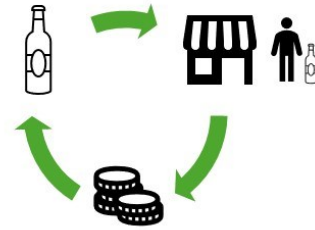
Thank & Close

Stimulus shown in depth interviews

Deposit Return Scheme For Drinks Containers

(Soft drinks and alcoholic drinks)

- The purpose of the scheme is to increase the volume of cans and bottles that are recycled
- A deposit (e.g. 20p) would be added to every can, glass bottle or plastic bottle purchased
- In a multipack the deposit will be added to each bottle or can in it
- All deposits are fully refundable
- To get the deposit back, bottles and cans can be returned to return points (reverse vending machines or in person over the counter). These will be plentiful and typically found within food & drink retailers such as supermarkets or convenience stores
- Deposits could be returned in the form of a receipt or voucher. These can then be used to spend on your next food or drink purchases



Examples Introduction

We are now going to show you some scenarios showing different alcohol products, within beer, wine, cider and spirits

In each scenario you will be shown the following information for these products

Product	A	B	C
Pack Type			
ABV (Alcohol Content)			
Total Units per Pack			
Price per pack			
Price per litre			
Price per unit of alcohol			

Within each scenario we will ask you which product you would be most likely to buy and why

To start with we will show you some products as they might appear in shops at the moment. Then after this with the introduction of a deposit return scheme

Any questions?

Current

Cider

Product	A	B	C	D	E	F
Pack	4 x440ml cans	10 x440ml cans	2 litre plastic bottle	2.5 litre plastic bottle	500ml glass bottle	500ml glass bottle
ABV	4.5%	4.5%	5.0%	7.5%	8.2%	4.0%
Total Units per Pack	7.9	19.8	10.0	18.8	4.1	2.0
Price per Pack	£4.65	£10.00	£5.00	£9.38	£2.10	£2.35
Price per Litre	£2.64	£2.27	£2.50	£3.75	£4.20	£4.70
Price per Unit of Alcohol	£0.59	£0.51	£0.50	£0.50	£0.51	£1.18

Beer

Product	A	B	C	D	E
Pack	4 x440ml cans	4 x568ml (pint) cans	10 x440ml cans	12 x 330ml glass bottles	500ml glass bottle
ABV	4.5%	5.0%	5.0%	5.0%	7.3%
Total Units per Pack	7.9	11.4	22.0	19.8	3.7
Price per Pack	£4.65	£6.00	£12.00	£13.00	£1.99
Price per Litre	£2.64	£2.64	£2.73	£3.28	£3.98
Price per Unit of Alcohol	£0.59	£0.53	£0.55	£0.66	£0.54

Wine

Product	A	B	C
Pack	Glass bottle (750ml)	Glass bottle (750ml)	Box (2.25 litres)
ABV	12.0%	12.0%	12.0%
Total Units per Pack	9.0	9.0	27.0
Price per Pack	£6.00	£10.00	£16.00
Price per Litre	£8.00	£13.33	£7.11
Price per Unit of Alcohol	£0.67	£1.11	£0.59

Spirits

Product	A	B	C
Type	Vodka	Vodka	Gin
Pack	Glass bottle (70cl)	Glass bottle (35cl)	Glass bottle (70cl)
ABV	37.5%	37.5%	37.5%
Total Units per Pack	26.3	13.1	26.3
Price per Pack	£15.00	£6.80	£17.50
Price per Litre	£21.43	£19.43	£25.00
Price per Unit of Alcohol	£0.57	£0.52	£0.67

20p per Container Deposit Return Scheme

Cider

Product	A	B	C	D	E	F
Pack	4 x440ml cans	10 x440ml cans	2 litre plastic bottle	2.5 litre plastic bottle	500ml glass bottle	500ml glass bottle
ABV	4.5%	4.5%	5.0%	7.5%	8.2%	4.0%
Total Units per Pack	7.9	19.8	10.0	18.8	4.1	2.0
Price per Pack	£5.45	£12.00	£5.20	£9.58	£2.30	£2.55
Price per Litre	£3.10	£2.73	£2.60	£3.83	£4.60	£5.10
Price per Unit of Alcohol	£0.69	£0.61	£0.52	£0.51	£0.56	£1.28
Deposit Returned per Pack	£0.80	£2.00	£0.20	£0.20	£0.20	£0.20

Beer

Product	A	B	C	D	E
Pack	4 x440ml cans	4 x568ml (pint) cans	10 x440ml cans	12 x 330ml glass bottles	500ml glass bottle
ABV	4.5%	5.0%	5.0%	5.0%	7.3%
Total Units per Pack	7.9	11.4	22.0	19.8	3.7
Price per Pack	£5.45	£6.80	£14.00	£15.40	£2.19
Price per Litre	£3.10	£2.99	£3.18	£3.89	£4.38
Price per Unit of Alcohol	£0.69	£0.60	£0.64	£0.78	£0.59
Deposit Returned per Pack	£0.80	£0.80	£2.00	£2.40	£0.20

Wine

Product	A	B	C
Pack	Glass bottle (750ml)	Glass bottle (750ml)	Box (2.25 litres)
ABV	12.0%	12.0%	12.0%
Total Units per Pack	9.0	9.0	27.0
Price per Pack	£6.20	£10.20	£16.00
Price per Litre	£8.27	£13.60	£7.11
Price per Unit of Alcohol	£0.69	£1.13	£0.59
Deposit Returned per Pack	£0.20	£0.20	£0.00

Spirits

Product	A	B	C
Type	Vodka	Vodka	Gin
Pack	Glass bottle (70cl)	Glass bottle (35cl)	Glass bottle (70cl)
ABV	37.5%	37.5%	37.5%
Total Units per Pack	26.3	13.1	26.3
Price per Pack	£15.20	£7.00	£17.70
Price per Litre	£21.71	£20.00	£25.29
Price per Unit of Alcohol	£0.58	£0.53	£0.67
Deposit Returned per Pack	£0.20	£0.20	£0.20

30p per Container Deposit Return Scheme

Cider

Product	A	B	C	D	E	F
Pack	4 x440ml cans	10 x440ml cans	2 litre plastic bottle	2.5 litre plastic bottle	500ml glass bottle	500ml glass bottle
ABV	4.5%	4.5%	5.0%	7.5%	8.2%	4.0%
Total Units per Pack	7.9	19.8	10.0	18.8	4.1	2.0
Price per Pack	£5.85	£13.00	£5.30	£9.68	£2.40	£2.65
Price per Litre	£3.32	£2.95	£2.65	£3.87	£4.80	£5.30
Price per Unit of Alcohol	£0.74	£0.66	£0.53	£0.51	£0.59	£1.33
Deposit Returned per Pack	£1.20	£3.00	£0.30	£0.30	£0.30	£0.30

Beer

Product	A	B	C	D	E
Pack	4 x440ml cans	4 x568ml (pint) cans	10 x440ml cans	12 x 330ml glass bottles	500ml glass bottle
ABV	4.5%	5.0%	5.0%	5.0%	7.3%
Total Units per Pack	7.9	11.4	22.0	19.8	3.7
Price per Pack	£5.85	£7.20	£15.00	£16.60	£2.29
Price per Litre	£3.32	£3.17	£3.41	£4.19	£4.58
Price per Unit of Alcohol	£0.74	£0.63	£0.68	£0.84	£0.62
Deposit Returned per Pack	£1.20	£1.20	£3.00	£3.60	£0.30

Wine

Product	A	B	C
Pack	Glass bottle (750ml)	Glass bottle (750ml)	Box (2.25 litres)
ABV	12.0%	12.0%	12.0%
Total Units per Pack	9.0	9.0	27.0
Price per Pack	£6.30	£10.30	£16.00
Price per Litre	£8.40	£13.73	£7.11
Price per Unit of Alcohol	£0.70	£1.14	£0.59
Deposit Returned per Pack	£0.30	£0.30	£0.00

Spirits

Product	A	B	C
Type	Vodka	Vodka	Gin
Pack	Glass bottle (70cl)	Glass bottle (35cl)	Glass bottle (70cl)
ABV	37.5%	37.5%	37.5%
Total Units per Pack	26.3	13.1	26.3
Price per Pack	£15.30	£7.10	£17.80
Price per Litre	£21.86	£20.29	£25.43
Price per Unit of Alcohol	£0.58	£0.54	£0.68
Deposit Returned per Pack	£0.30	£0.30	£0.30

Annex B Quantitative Questionnaire

[RADIO] Q1: **In which part of the UK do you live?**

- [1] East Midlands
 - [2] East of England
 - [3] Greater London
 - [4] North East England
 - [5] North West England
 - [6] Northern Ireland
 - [7] Scotland
 - [8] South East England
 - [9] South West England
 - [10] Wales
 - [11] West Midlands
 - [12] Yorkshire and The Humber
-

[RADIO] Q2: **Would you like to complete the survey in English or Welsh?**

- [1] English
 - [2] Welsh
-

[RADIO] Q3: **What is your gender?**

- [1] Male
 - [2] Female
 - [3] Other/prefer not to answer
-

[RADIO] Q4: **What is your age?**

- [1] 18-24
- [2] 25-34
- [3] 35-44
- [4] 45-54
- [5] 55-64
- [6] 65-74
- [7] 75+

[RADIO] Q5: Please indicate which occupational group the Chief Income Earner in your household belongs to, or which group description best fits. The Chief Income Earner is the person in your household with the largest income.

If retired and not living on a state pension, please select the occupational group prior to retirement.

- [6] Casual worker - not in permanent employment / Homemaker / Retired and living on state pension / Unemployed or not working due to long-term sickness / Full-time caregiver of other household member
- [5] Semi or unskilled manual work (e.g. Manual workers, all Apprentices to the skilled trades, Caretaker, Park keeper, non-HGV driver, Shop assistant)
- [4] Skilled manual worker (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus or Ambulance Driver, HGV driver, AA patrolman, Pub or Bar worker, etc.)
- [3] Supervisory / Clerical / Junior managerial or professional / Administrative / Student (e.g. Office worker, Student Doctor, Foreman with 25+ employees, Salesperson, etc.)
- [2] Intermediate managerial / Professional / Administrative (e.g. Newly qualified (under 3 years) Doctor, Solicitor, Board director in a small organization, Middle manager in large organization, Principle officer in civil service or local government)
- [1] Higher managerial / Professional / Administrative (e.g. Established Doctor, Solicitor, Board Director in a large organization (200+ employees), Top level civil servant or public service employee)
- [7] Other / Prefer not to answer

[RADIO] Q6: Have you had an alcoholic drink of any kind in the last 12 months?

- [1] Yes
- [2] No
- [3] Don't know

[NONE] PN: This survey is being conducted on behalf of the Welsh Government by Levercliff, an independent research organisation. Your answers are important in helping the Welsh Government understand the impact of a Deposit Return Scheme on alcohol purchasing behaviours. To read the full privacy notice click [here](#). - The survey should take just over 10 minutes to complete. All responses will be completely confidential, and all data is collected and processed in compliance with all data protection laws and The Market Research Society Code of Conduct.

[RADIO] Q7: **Before we ask you about the deposit return scheme, we would like to understand what types of alcoholic drinks you normally drink**

How often have you had an alcoholic drink of any kind during the last 12 months?

- [1] Almost every day
 - [2] Five or six days a week
 - [3] Three or four days a week
 - [4] Once or twice a week
 - [5] Once a fortnight
 - [6] Once or twice a month
 - [7] Once every couple of months
 - [8] Once or twice a year
 - [9] Never
-

[CHECKBOX] Q8: **Thinking about the last 12 months which of the following types of alcoholic drinks have you had?**

Instructions: Please select all that apply

- [1] Beer (including lager)
 - [2] Cider
 - [3] Wine (including sparkling wine such as prosecco)
 - [4] Fortified wine like sherry or port
 - [5] Spirits such as gin, vodka, rum
 - [6] Liqueurs
 - [7] Cocktails
 - [8] Ready to Drink pre-mixed spirits or cocktails (RTDs)
-

[SIMPLE_GRID][RADIO] Q9: **During the last 12 months, how often have you had a drink of the following types of beer?**

Rows:

- [1] **Standard beer or lager** (ABV 4%-5%)
- [2] **Strong beer or lager** (ABV 6%+ e.g. Duval, McEwans Champion Ale)

Columns:

- [1] Almost every day
- [2] Five or six days a week

- [3] Three or four days a week
- [4] Once or twice a week
- [5] Once or twice a month
- [6] Once every couple of months
- [7] Once or twice a year
- [8] Never

Don't know:

[NONE] Q10Intro: **On the days you drink beer, how much of it did you usually drink?**

Instructions:

1. First please select the can or bottle size (or measure) you would normally drink e.g. if you normally drink 440ml cans, please answer for 440ml cans
2. Second please state how many of these you would normally drink on a typical occasion. E.g. if you normally drink 3 440ml cans enter the number 3

Q10: **Standard beer or lager (e.g. 4%-5%)**

Instructions: Please enter a number in 1 box only

Rows:

- [1] Half pints
- [2] Pints
- [3] Small cans or bottles (e.g. 330ml)
- [4] Cans (440ml)
- [5] Pint cans (568ml)
- [6] Glass bottles (500ml)
- [7] Large glass bottles (660ml)
- [8] Other, please describe [SPECIFY]

Strong beer or lager (e.g. ABV 6%+)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Half Pints
- [2] Pints
- [3] Small cans or bottles (e.g. 330ml)

- [4] Cans (440ml)
 - [5] Pint cans (568ml)
 - [6] Glass bottles (500ml)
 - [7] Large glass bottles (660ml)
 - [8] Other, please describe [SPECIFY]
-

[SIMPLE_GRID][RADIO] Q11: **During the last 12 months, how often have you had a drink of the following types of cider?**

Rows:

- [1] **Standard apple cider** (e.g. Strongbow, Thatchers Gold, Magners or Inches)
- [2] **Fruit cider** (e.g. Strongbow Dark Fruit, Kopparberg)
- [3] **Premium or vintage cider** (e.g. Henry Westons, Thatchers Katy)
- [4] **Higher strength ciders** (e.g. Frosty Jacks, K-Cider or Omega)

Columns:

- [1] Almost every day
 - [2] Five or six days a week
 - [3] Three or four days a week
 - [4] Once or twice a week
 - [5] Once or twice a month
 - [6] Once every couple of months
 - [7] Once or twice a year
 - [8] Never
-

[NONE] Q12Intro: **On the days you drink cider, how much of it did you usually drink?**

Instructions:

1. First, please select the can or bottle size (or measure) you would normally drink e.g. if you normally drink 440ml cans, please answer for 440ml cans
2. Second, please state how many of these you would normally drink on a typical occasion. E.g. if you normally drink 3 440ml cans enter the number 3

Q12: **Standard apple cider** (e.g. Strongbow, Thatchers Gold, Magners or Inches)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Half pints
 - [2] Pints
 - [3] Small cans or bottles (e.g. 330ml)
 - [4] Cans (440ml)
 - [5] Pint cans (568ml)
 - [6] Glass bottles (500ml)
 - [7] Plastic bottle (2 or 2.5 litres)
 - [8] Other, please describe [SPECIFY]
-

Q12a: **Fruit cider** (e.g. Strongbow Dark Fruit, Kopparberg)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Half pints
 - [2] Pints
 - [3] Small cans or bottles (e.g. 330ml)
 - [4] Cans (440ml)
 - [5] Pint cans (568ml)
 - [6] Glass bottles (500ml)
 - [7] Plastic bottle (2 or 2.5 litres)
 - [8] Other, please describe [SPECIFY]
-

Q12b: **Premium or vintage cider** (e.g. Henry Westons, Thatchers Katy)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Half pints
- [2] Pints
- [3] Small cans or bottles (e.g. 330ml)
- [4] Cans (440ml)

- [5] Pint cans (568ml)
 - [6] Glass bottles (500ml)
 - [7] Plastic bottle (2 or 2.5 litres)
 - [8] Other, please describe [SPECIFY]
-

Q12c: **Higher strength ciders** (e.g. Frosty Jacks, K-Cider or Omega)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Half pints
- [2] Pints
- [3] Small cans or bottles (e.g. 330ml)
- [4] Cans (440ml)
- [5] Pint cans (568ml)
- [6] Glass bottles (500ml)
- [7] Plastic bottle (2 or 2.5 litres)
- [8] Other, please describe [SPECIFY]

Columns:

- [1] **Higher strength ciders** (e.g. Frosty Jacks, K-Cider or Omega)
-

[RADIO] Q13: **During the last 12 months, how often have you had a drink of wine, including sparkling wine such as prosecco?**

- [1] Almost every day
 - [2] Five or six days a week
 - [3] Three or four days a week
 - [4] Once or twice a week
 - [5] Once or twice a month
 - [6] Once every couple of months
 - [7] Once or twice a year
 - [8] Never
-

Q14: On the days you drink wine, how much of it did you usually drink?

Instructions: Instructions:

1. First please select the type of bottle or glass size you would normally drink e.g. if you normally drink large glasses, please answer for large glasses
2. Second, please state how many of these you would normally drink on a typical occasion. E.g. if you normally 3 large glasses enter 3 for large glasses.

Please enter a number in 1 box only

Rows:

- [1] Standard bottles (750ml)
 - [2] Half a standard bottle
 - [3] Small bottles / cans (approx. 200ml)
 - [4] Small glass (approx. 125ml)
 - [5] Medium glass (approx. 175ml)
 - [6] Large glass (approx. 250ml)
 - [7] Other, please describe [SPECIFY]
-

Fortified wine

[RADIO] **Q15: During the last 12 months, how often have you had a drink of fortified wine (e.g. sherry or port)?**

- [1] Almost every day
 - [2] Five or six days a week
 - [3] Three or four days a week
 - [4] Once or twice a week
 - [5] Once or twice a month
 - [6] Once every couple of months
 - [7] Once or twice a year
 - [8] Never
-

Q16: On the days you drink fortified wine, how much of it did you usually drink?

Instructions: Instructions:

1. First, please select the pack type or measure you would normally drink e.g. if you normally drink a standard glass please enter for standard glasses.
2. Second, please state how many of these you would normally drink on a typical occasion E.g. if you normally drink 2 standard glasses enter 2 for standard glasses.

Rows:

- [1] Sherry glass (approx. 90ml)
- [2] Small glass (approx. 125ml)
- [3] Standard glass (approx. 175ml)
- [4] Standard bottle (75cl or 750ml)
- [5] Half a standard bottle
- [6] Other, please describe [SPECIFY]

Q17 During the last 12 months, how often have you had a drink of the following?

Rows:

- [1] **Spirits** (e.g. vodka, gin, rum)
- [2] **Liqueurs** (e.g. Baileys, Archers, Sourz)
- [3] **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
- [4] **Cocktails**

Columns:

- [1] Almost every day
- [2] Five or six days a week
- [3] Three or four days a week
- [4] Once or twice a week
- [5] Once or twice a month
- [6] Once every couple of months
- [7] Once or twice a year
- [8] Never

[NONE] Q18: **On the days you drink this, how much of it did you usually drink?**

Instructions:

1. First, please select the measure you would normally drink
2. Second enter the amount you would normally drink on a typical occasion e.g. if you normally drink 3 measures of

[SIMPLE_GRID][NUMERIC] Q18a: **Spirits** (e.g. vodka, gin, rum, whisky)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Measures (25ml)
 - [2] Glasses
 - [3] Bottle 50cl
 - [7] Half a 50cl bottle
 - [4] Bottle 70cl
 - [8] Half a 70cl bottle
 - [5] Bottle 1 litre
 - [9] Half a 1 litre bottle
 - [6] Other, please describe [SPECIFY]
-

[SIMPLE_GRID][NUMERIC] Q18b: **Liqueurs** (e.g. Baileys, Archers, Sourz)

Instructions: Please enter a number in 1 box only

Rows:

- [1] Measures (25ml)
 - [2] Glasses
 - [3] Bottle 50cl
 - [7] Half a 50cl bottle
 - [4] Bottle 70cl
 - [8] Half a 70cl bottle
 - [5] Bottle 1 litre
 - [9] Half a 1 litre bottle
 - [6] Other, please describe [SPECIFY]
-

[SIMPLE_GRID][NUMERIC] Q18c: **Ready to Drink Pre-mixed Spirits or Cocktails (RTDs)**

Instructions: Please enter a number in 1 box only

Rows:

- [1] Cans or small bottles (e.g. 250ml)
- [2] Glasses
- [3] Bottle 50cl
- [4] Half a 50cl bottle
- [5] Bottle 70cl
- [6] Half a 70cl bottle
- [7] Other, please describe [SPECIFY]

[SIMPLE_GRID][NUMERIC] Q18d: **Cocktails**

Instructions: Please enter a number in 1 box only

Rows:

- [1] Glasses
 - [2] Other, please describe [SPECIFY]
-

[SIMPLE_GRID][RADIO] Q19: **How often have you typically purchased alcohol from the following type of retailers in the last 12 months?**

Rows:

- [1] **Supermarkets**
- [2] **Convenience stores**
- [3] **Wholesaler (e.g. Costco, Booker)**
- [4] **Online retailers**
- [5] **Off-licence**
- [6] **Wine, beer or cider club**
- [7] **Other, please describe [SPECIFY]**

Columns:

- [1] Multiple times a week
- [2] Once a week
- [3] 2 or 3 times a month
- [4] Once a month
- [5] Once or twice every 3 months
- [6] Once every 6 months
- [7] Once a year
- [8] Never

Don't know:

[CHECKBOX] Q20: **And of the types of alcohol you drink, which have you purchased from retailers in the last 12 months (e.g. supermarkets, convenience stores, online retailers etc)**

- [1] Beer
- [2] Cider

- [3] Wine (including sparkling wine such as prosecco)
 - [4] Fortified wine like sherry or port
 - [5] Spirits (e.g. gin, vodka, rum)
 - [6] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [7] Ready to Drink pre-spirits or cocktails (RTDs)
 - [8] Other, please describe [SPECIFY]
-

[SIMPLE_GRID][RADIO] Q21: **And of the types of alcohol you drink, how often do you buy these from retailers (e.g. supermarkets, convenience stores, online retailers etc)**

Rows:

- [1] **Beer**
- [2] **Cider**
- [3] **Wine (including sparkling wine such as prosecco)**
- [4] **Fortified wine like sherry or port**
- [5] **Spirits (e.g. gin, vodka, rum)**
- [6] **Liqueurs (e.g. Baileys, Archers, Sourz)**
- [7] **Ready to Drink pre-mixed spirits or cocktails (RTDs)**

Columns:

- [1] Multiple times a week
- [2] Once a week
- [3] 2 or 3 times a month
- [4] Once a month
- [5] Once or twice every 3 months
- [6] Once every 6 months
- [7] Once a year
- [8] Buy seasonally e.g. just in the summer or at Christmas
- [9] Never

Don't know:

[NONE] Q22: **Thinking about the following types of alcohol you buy from retailers, what pack types do you typically buy these in?**

Beer

Instructions: Pack types you normally buy

- [1] Single cans
- [2] Cans 4 x 440ml multipack
- [3] Cans 4 x 568ml multipack
- [4] Cans 10 x 440ml multipack
- [5] Single glass bottles 500ml
- [6] Single glass bottles 660ml
- [7] Glass bottles 12 x 330ml multipack
- [8] Glass bottles 4 x 330ml multipack
- [9] Other, please describe [SPECIFY]

Cider

Instructions: Pack types you normally buy

- [1] Single cans
- [9] Cans 4 x 330ml multipack
- [2] Cans 4 x 440ml multipack
- [3] Cans 4 x 568ml (pint) multipack
- [4] Cans 10 x 440ml multipack
- [5] Cans 10 x 330ml multipack
- [6] Single glass bottles 500ml
- [7] Single plastic bottles (2 litres or 2.5 litres)
- [8] Other, please describe [SPECIFY]

Wine (including sparkling wine such as prosecco)

- [1] Standard bottles (75cl)
- [2] Small bottles or cans (18.7cl - 20cl)
- [3] Boxes (2.25 litres)
- [4] Other, please describe [SPECIFY]

Spirits, Liqueurs or Fortified Wine

- [1] Small glass bottles 35cl
- [2] Glass bottles 50cl
- [3] Standard glass bottles 70cl
- [4] Large glass bottles 1 litre
- [5] Other, please describe [SPECIFY]

Ready to Drink pre-spirits or cocktails (RTDs)

- [1] Single cans
 - [2] Cans / bottles 4 x 250ml pack
 - [3] Cans / bottles 10 x 250ml multipack
 - [4] Single bottles 70cl (700ml)
 - [5] Other, please describe [SPECIFY]
-

[SIMPLE_GRID][CHECKBOX] Q23: **And in the last 12 months where have you consumed these alcoholic drinks that you have purchased from retailers?**

Rows:

- [1] At your home
- [2] Out of home (e.g. on a train, in a park, for a picnic, on the beach)
- [3] At someone else's home (e.g. taken to a party, for drinks)
- [4] Other, please describe [SPECIFY]

Columns:

- [1] **Beer**
- [2] **Cider**
- [3] **Wine (including sparkling wine such as prosecco)**
- [4] **Spirits, Liqueurs or Fortified wine**
- [5] **Ready to Drink pre-spirits or cocktails (RTDs)**

Don't know:

[SIMPLE_GRID][RADIO] Q24: **To what extent do you agree or disagree with these statements?**

Rows:

- [1] **I have a preferred type of alcoholic drink that I drink more than others**
- [2] **I tend to drink different types of alcoholic drink in different situations or occasions**

Columns:

- [1] **Strongly Agree**

- [2] Tend to agree
 - [3] Neither agree nor disagree
 - [4] Tend to disagree
 - [5] Strongly disagree
 - [6] Don't know
-

[RADIO] Q25: **The Welsh Government, alongside the other Governments in the UK, is working on a new approach to recycling drinks containers, called a deposit return scheme or DRS. It aims to improve recycling rates and reduce litter.**

Before today had you heard about this scheme?

- [1] Yes
 - [2] No
 - [3] Don't know
-

[TEXT] Q26: **In your own words, please could you briefly describe what the Deposit Return Scheme for drinks containers is.**

PLEASE READ CAREFULLY

How the Deposit Return Scheme for drinks containers would work:

The deposit return scheme is a new way to recycle drinks containers (soft drinks and alcoholic drinks). Its **aim** is to **increase recycling and reduce litter.**

A deposit (e.g. 20p) would be **added to every can, glass bottle or plastic bottle purchased.** In a multipack the deposit will be added to each bottle or can in it.

All deposits are fully refundable.

To get the deposit back, bottles and cans can be returned to any return point. These could be a machine at supermarkets or in public places such as train stations and leisure centres, or over the counter at a local shop. You do not have to return it to the same place you bought it from.

Deposits would be returned in the form of a receipt or voucher. These can then be used to spend on your next food or drink purchases (and would not be limited to the place you returned your empty bottles or cans)

Examples if the deposit was 20p on every can or bottle

1. A bottle of wine costs £7.00. The price you would pay at the point of purchase would be £7.00 plus a 20p deposit. If you returned the empty bottle to one of the return points you would get the 20p deposit back as a voucher. If you didn't the deposit amount, 20p, would be lost.

2. A 4 pack of 440ml cans of beer or cider costs £4.65. The price you would pay at the point of purchase would be £4.65 plus an 80p deposit (20p for each of the cans in the pack). If you returned the empty cans to one of the return points you would get the 80p deposit back as a voucher. If you didn't the deposit amount, 80p, would be lost.

[SCALE] Q27: What is your first reaction to the scheme?

Instructions: Please give your honest answer

- [1] I don't like it at all
 - [2] Somewhat negative
 - [3] Neutral
 - [4] Somewhat positive
 - [5] I really like this idea
-

[TEXT] Q28: Please could you describe why you feel this way regarding the Deposit Return Scheme - [[Q27:TEXT]]?

[RADIO] Q29: And which of the following best describes your understanding of how the deposit return scheme would work?

- [1] I think it's confusing
 - [2] I understand how it would work in principle, but I have a lot of questions
 - [3] I understand how it would work in principle, but I have some questions
 - [4] I fully understand how it would work
-

[TEXT] Q30: **What are the main questions you have about how it would work?**

[TEXT] Q30X: **Why do you feel the Deposit Return Scheme is confusing?**

[NONE] Q31Intro: **To what extent do you think you would use a Deposit Return Scheme to dispose of alcoholic drinks containers?**

[RADIO] Q31: **For alcoholic drinks consumed at home**

- [1] I would use the Deposit Return Scheme on all occasions
 - [2] I would use the Deposit Return Scheme on most occasions
 - [3] I would use the Deposit Return Scheme on some occasions
 - [4] I would never use the Deposit Return Scheme - I would keep disposing of these items in the usual way
 - [6] I don't consume alcoholic drinks at home
 - [5] Don't know
-

[RADIO] Q31b: **For alcoholic drinks consumed out of home but purchased from a retailer (e.g. for a picnic, on the beach, in a park or on the train)**

- [1] I would use the Deposit Return Scheme on all occasions
 - [2] I would use the Deposit Return Scheme on most occasions
 - [3] I would use the Deposit Return Scheme on some occasions
 - [4] I would never use the Deposit Return Scheme - I would keep disposing of these items in the usual way
 - [5] I don't drink alcoholic drinks purchased from retailers out of home
 - [6] Don't know
-

[CHECKBOX] Q32: **And what, if anything, do you think would make it difficult for you to collect & return empty alcoholic drinks containers?**

- [1] I have a disability
- [2] Infirmity

- [3] Transportation issues e.g. no access to a car, don't drive, poor access to public transport
 - [4] Lack of time
 - [5] I live in a rural area
 - [6] I have limited space inside to store empty containers
 - [7] I live in shared accommodation (shared house or student accommodation)
 - [8] A medical a reason
 - [9] I do not have access to outside storage space (e.g. live in flat)
 - [10] The number of empty containers I'd need to return
 - [11] A feeling that others may judge me based on the types or amount of alcoholic drinks containers I'm returning
 - [12] Needing to store / handle messy drinks containers at home.
 - [13] If drinking out of home - needing to carry messy drinks containers until I find a return point
 - [14] Other, please describe [SPECIFY]
 - [15] Nothing
-

[NONE] SECTION4INTRO: **We would now like to understand how your disposal of alcoholic drinks containers or the alcoholic drinks you buy may change, if at all, with the introduction of a deposit return scheme.**

We will first ask you a set of questions where the deposit amount is set at one level and then following this, if it was set at a different amount.

[NONE] Q33: **20p Deposit Return Scheme**

Thinking about the types of alcohol you buy from retailers and the types of packs you buy it in, which option most closely describes what you would do with the introduction of a 20p Deposit Return Scheme?

(Where a 20p deposit would be added to every can or glass bottle purchased, but the deposit could be refunded via vouchers at return points)

[SIMPLE_GRID][RADIO] Q33B: **BEER**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Single cans (20p deposit)**
- [2] **Cans 4 x 440ml multipack (80p deposit)**

- [3] Cans 4 x 568ml multipack (80p deposit)
- [4] Cans 10 x 440ml multipack (£2.00 deposit)
- [5] Single glass bottle 500ml (20p deposit)
- [6] Single glass bottle 660ml (20p deposit)
- [7] Glass bottles 12 x 330ml multipack (£2.40 deposit)
- [8] Glass bottles 4 x 330ml multipack (80p deposit)

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying beer completely [DONTKNOW]

[SIMPLE_GRID][RADIO] Q33C: CIDER

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] Single cans (20p deposit)
- [8] Cans 4 x 330ml multipack (80p deposit)
- [2] Cans 4 x 440ml multipack (80p deposit)
- [3] Cans 4 x 568ml (pint) multipack (80p deposit)
- [4] Cans 10 x 440ml multipack (£2.00 deposit)
- [5] Cans 10 x 330ml multipack (£2.00 deposit)
- [6] Single glass bottle 500ml (20p deposit)
- [7] Plastic bottles 2 litres or 2.5 litres (20p deposit)

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)

- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying cider completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q33W: **Wine (including sparkling wine such as prosecco)**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Standard bottles 75cl (20p deposit)**
- [2] **Small bottles or cans 18.7cl - 20cl (20p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying wine completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q33Sp: **Spirits, Liqueurs, Fortified wine**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Small glass bottle 35cl (20p deposit)**
- [2] **Glass bottle (50cl 20p deposit)**
- [3] **Standard glass bottle 70cl (20p deposit)**
- [4] **Large glass bottle 1 litre (20p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS

- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying spirits, liqueurs or fortified wine completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q33RTD: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Single cans (20p deposit)**
- [2] **Cans / bottles 4 x 250ml multipack (80p deposit)**
- [3] **Cans / bottles 10 x 250ml multipack (£2.00 deposit)**
- [4] **Single bottles 70cl (700ml) (20p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying RTDs (pre-mixed spirits or cocktails) completely [DONTKNOW]
-
-

[NONE] Q34INTRO: **BEER**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q34_1: **Beer**

Instead of single cans (20p deposit) I would be most likely to buy

- [1] Cans 4 x 440ml multipack (80p deposit)
 - [2] Cans 4 x 568ml/pint multipack (80p deposit)
 - [3] Cans 10 x 440ml multipack (£2.00 deposit)
 - [4] Single glass bottle 500ml (20p deposit)
 - [5] Single glass bottle 660ml (20p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_2: **Beer**

Instead of 4 x 440ml can multipacks (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans 4 x 568ml/pint multipack (80p deposit)
 - [3] Cans 10 x 440ml multipack (£2.00 deposit)
 - [4] Single glass bottles 500ml (20p deposit)
 - [5] Single glass bottles 660ml (20p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_3: **Beer**

Instead of 4 x 568ml can multipacks (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 10 x 440ml multipack (£2.00 deposit)
 - [4] Single glass bottles 500ml (20p deposit)
 - [5] Single glass bottles 660ml (20p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_4: **Beer**

Instead of 10 x 440ml can multipacks (£2.00 deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml/pint multipack (80p deposit)
 - [4] Single glass bottles 500ml (20p deposit)
 - [5] Single glass bottles 660ml (20p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_5: **Beer**

Instead of 500ml single glass bottles (20p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml/pint multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Single glass bottles 660ml (20p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_6: **Beer**

Instead of 660ml single glass bottles (20p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml/pint multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_7: **Beer**

Instead of 12x330ml glass bottle multipack (£2.40 deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
- [2] Cans 4 x 440ml multipack (80p deposit)

- [3] Cans 4 x 568ml/pint multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Single glass bottles 660ml (20p deposit)
 - [7] Glass bottles 4 x 330ml multipack (80p deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34_8: **Beer**

Instead of 4x330ml glass bottle multipack (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml/pint multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Single glass bottles 660ml (20p deposit)
 - [7] Glass bottles 12 x 330ml multipack (£2.40 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q34X: **And with the introduction of a 20p Deposit Return Scheme, how do you think this would influence how much beer you buy overall?**

- [1] I will continue to buy the same amount of beer
 - [2] I will buy less beer
 - [3] I will buy more beer
 - [4] Don't know
-

Page 37 : Beer 20p DRS

[RADIO] Q35: **Beer**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would buy less beer or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Cider
- [2] Spirits (e.g. gin, vodka, rum)
- [3] Liqueurs (e.g. Baileys, Archers, Sourz)

- [4] Fortified wine (e.g. sherry or port)
 - [5] Wine (including sparkling wine)
 - [6] RTDs (pre-mixed spirits or cocktails)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q36: **Please could you let us know why you think you would buy _____ rather than beer, with the introduction of a 20p deposit return scheme?**

[NONE] Q37: **Cider**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether. What would you buy instead?

[RADIO] Q37_1: **Cider**

Instead of single cans (20p deposit) I would be most likely to buy

- [9] Cans 4 x 330ml multipack (80p deposit)
 - [1] Cans 4 x 440ml multipack (80p deposit)
 - [2] Cans 4 x 568ml (pint) multipack (80p deposit)
 - [3] Cans 10 x 440ml multipack (£2.00 deposit)
 - [4] Cans 10 x 330ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_2: **Cider**

Instead of 4 x 440ml can multipacks (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)

- [9] Cans 4 x 330ml multipack (80p deposit)
 - [2] Cans 4 x 568ml (pint) multipack (80p deposit)
 - [3] Cans 10 x 440ml multipack (£2.00 deposit)
 - [4] Cans 10 x 330ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_3: **Cider**

Instead of 4 x 568ml (pint) can multipacks (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [9] Cans 4 x 330ml multipack (80p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 10 x 440ml multipack (£2.00 deposit)
 - [4] Cans 10 x 330ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_4: **Cider**

Instead of 10 x 440ml can multipacks (£2.00 deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [9] Cans 4 x 330ml multipack (80p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml (pint) multipack (80p deposit)
 - [4] Cans 10 x 330ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_5: **Cider**

Instead of 10 x 330ml multipacks (£2.00 deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
- [9] Cans 4 x 330ml multipack (80p deposit)

- [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml (pint) multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Single glass bottles 500ml (20p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_6: **Cider**

Instead of 500ml single glass bottles (20p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [9] Cans 4 x 330ml multipack (80p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml (pint) multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Cans 10 x 330ml multipack (£2.00 deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_7: **Cider**

Instead of 2/2.5 litre plastic bottles (20p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [9] Cans 4 x 330ml multipack (80p deposit)
 - [2] Cans 4 x 440ml multipack (80p deposit)
 - [3] Cans 4 x 568ml (pint) multipack (80p deposit)
 - [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Cans 10 x 330ml multipack (£2.00 deposit)
 - [6] Single glass bottles 500ml (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37_8: **Cider**

Instead of 4 x 330ml can multipacks (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
- [2] Cans 4 x 440ml multipack (80p deposit)
- [3] Cans 4 x 568ml (pint) multipack (80p deposit)

- [4] Cans 10 x 440ml multipack (£2.00 deposit)
 - [5] Cans 10 x 330ml multipack (£2.00 deposit)
 - [6] Single glass bottles 500ml (20p deposit)
 - [9] Plastic bottles 2 litres or 2.5 litres (20p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q37X: **And with the introduction of a 20p Deposit Return Scheme, how do you think this would influence how much cider you buy overall?**

- [1] I will continue to buy the same amount of cider
 - [2] I will buy less cider
 - [3] I will buy more cider
 - [4] I don't know
-
-

[RADIO] Q38: **Cider**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would buy less cider or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
 - [2] Spirits (e.g. gin, vodka, rum)
 - [3] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [4] Fortified wine (e.g. sherry or port)
 - [5] Wine (including sparkling wine)
 - [6] RTDs (pre-mixed spirits or cocktails)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q39: **Please could you let us know why you think you would buy _____ rather than cider, with the introduction of a 20p deposit return scheme?**

[NONE] Q40: **Wine (including sparkling wine such as prosecco)**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q40_1: **Wine**

Instead of a standard bottle of wine (20p deposit) I would be most likely to buy

- [1] Small bottles or cans 18.7cl - 20cl (20p deposit)
 - [2] Boxes 2.25 litres (no deposit)
 - [3] Other, please describe [SPECIFY]
 - [4] Don't know
-

[RADIO] Q40_2: **Wine**

Instead of small bottles of wine (20p deposit) I would be most likely to buy

- [1] Standard bottles 75cl (20p deposit)
 - [2] Boxes 2.25 litres (no deposit)
 - [3] Other, please describe [SPECIFY]
 - [4] Don't know
-

[RADIO] Q40X: **And with the introduction of a 20p Deposit Return Scheme, how do you think this would influence how much wine you buy overall?**

- [1] I will continue to buy the same amount of wine
 - [2] I will buy less wine
 - [3] I will buy more wine
 - [4] I don't know
-

[RADIO] Q41: **Wine (including sparkling wine such as prosecco)**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would buy less wine or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
- [2] Cider

- [3] Spirits (e.g. gin, vodka, rum)
 - [4] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [5] Fortified wine (e.g. sherry or port)
 - [6] RTDs (pre-mixed spirits or cocktails)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q42: **Please could you let us know why you think you would buy _____ rather than wine, with the introduction of a 20p deposit return scheme?**

[NONE] Q43: **Spirits, Liqueurs, Fortified wine**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q43_1: **Spirits, Liqueurs, Fortified wine**

Instead of a small single glass bottle 35cl (20p deposit) I would be most likely to buy

- [1] Glass bottle 50cl (20p deposit)
 - [2] Standard glass bottle 70cl (20p deposit)
 - [3] Large glass bottle 1 litre (20p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q43_2: **Spirits, Liqueurs, Fortified wine**

Instead of a glass bottle 50cl (20p deposit) I would be most likely to buy

- [1] Small glass bottle 35cl (20p deposit)
 - [2] Standard glass bottle 70cl (20p deposit)
 - [3] Large glass bottle 1 litre (20p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q43_3: **Spirits, Liqueurs, Fortified wine**

Instead of a standard glass bottle 70cl (20p deposit) I would be most likely to buy

- [1] Small glass bottle 35cl (20p deposit)
 - [2] Glass bottle 50cl (20p deposit)
 - [3] Large glass bottle 1 litre (20p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q43_4: **Spirits, Liqueurs, Fortified wine**

Instead of a large glass bottle 1 litre (20p deposit) I would be most likely to buy

- [1] Small glass bottle 35cl (20p deposit)
 - [2] Glass bottle 50cl (20p deposit)
 - [3] Standard glass bottle 70cl (20p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q43X: **And with the introduction of a 20p Deposit Return Scheme, how do you think this would influence the amount of spirits, liqueurs or fortified wines you buy overall?**

- [1] I will continue to buy the same amount of spirits, liqueurs or fortified wines
 - [2] I will buy less spirits, liqueurs or fortified wines
 - [3] I will buy more spirits, liqueurs or fortified wines
 - [4] I don't know
-

[RADIO] Q44: **Spirits, liqueurs, or fortified wine**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would buy less spirits, liqueurs, or fortified wine or stop buying them completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
- [2] Cider
- [3] Wine
- [4] RTDs (pre-mixed spirits or cocktails)
- [5] Type of soft drink
- [6] Other, please describe [SPECIFY]
- [7] Nothing - I would just buy less
- [8] Don't know

[TEXT] Q45: **Please could you let us know why you think you would buy_____rather than spirits, liqueurs or fortified wine, with the introduction of a 20p deposit return scheme?**

[NONE] Q46: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
With the introduction of a 20p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q46_1: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
Instead of single cans (20p deposit) I would be most likely to buy

- [1] Cans / bottles 4 x 250ml multipack (80p deposit)
 - [2] Cans / bottles 10 x 250ml multipack (80p deposit)
 - [3] Single glass bottles 70cl (700ml) (20p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q46_2: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
Instead of 4 x 250ml can multipacks (80p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans / bottles 10 x 250ml multipack (£2.00 deposit)
 - [3] Single glass bottles 70cl (700ml) (20p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q46_3: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
Instead of 10 x 250ml can multipacks (£2.00 deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
- [2] Cans / bottles 4 x 250ml multipack (80p deposit)
- [3] Single glass bottles 70cl (700ml) (20p deposit)
- [4] Other, please describe [SPECIFY]
- [5] Don't know

[RADIO] Q46_4: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
Instead of a single 70cl bottle (20p deposit) I would be most likely to buy

- [1] Single cans (20p deposit)
 - [2] Cans / bottles 4 x 250ml multipack (80p deposit)
 - [3] Cans / bottles 10 x 250ml multipack (£2.00 deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q46X: **And with the introduction of a 20p Deposit Return Scheme, how do you think this would influence the amount of Ready to Drink pre-mixed spirits or cocktails you buy overall?**

- [1] I will continue to buy the same amount of RTDs
 - [2] I will buy less RTDs
 - [3] I will buy more RTDs
 - [4] I don't know
-

[RADIO] Q47: **RTDs**

With the introduction of a 20p deposit DRS scheme, you mentioned that you would buy less RTDs or stop buying them completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
 - [2] Cider
 - [3] Spirits (e.g. gin, vodka, rum)
 - [4] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [5] Fortified wine (e.g. sherry or port)
 - [6] Wine (including sparkling wine)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q48: Please could you let us know why you think you would buy _____ rather than RTDs, with the introduction of a 20p deposit return scheme?

[NONE] Q49: **30p Deposit Return Scheme**

Thinking about the types of alcohol you buy from retailers and the packaging you buy it in, which option most closely describes what you would do with the introduction of a 30p Deposit Return Scheme?

(A deposit return scheme where a 30p deposit would be added to every can or glass bottle purchased, but the deposit could be refunded via vouchers at return points)

[SIMPLE_GRID][RADIO] Q49B: **BEER**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Single cans (30p deposit)**
- [2] **Cans 4 x 440ml multipack (£1.20 deposit)**
- [3] **Cans 4 x 568ml multipack (£1.20 deposit)**
- [4] **Cans 10 x 440ml multipack (£3.00 deposit)**
- [5] **Single glass bottle 500ml (30p deposit)**
- [6] **Single glass bottle 660ml (30p deposit)**
- [7] **Glass bottles 12 x 330ml multipack (£3.60 deposit)**
- [8] **Glass bottles 4 x 330ml multipack (£1.20 deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying beer completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q49C: **CIDER**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Single cans (30p deposit)**
- [8] **Cans 4 x 330ml multipack (£1.20 deposit)**
- [2] **Cans 4 x 440ml multipack (£1.20 deposit)**
- [3] **Cans 4 x 568ml (pint) multipack (£1.20 deposit)**
- [4] **Cans 10 x 440ml multipack (£3.00 deposit)**
- [5] **Cans 10 x 330ml multipack (£3.00 deposit)**
- [6] **Single glass bottle 500ml (30p deposit)**
- [7] **Plastic bottles 2 litres or 2.5 litres (30p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying cider completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q49W: **Wine (including sparkling wine such as prosecco)**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Standard bottles 75cl (30p deposit)**
- [2] **Small bottles or cans 18.7cl - 20cl (30p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS

- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying wine completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q49Sp: **Spirits, Liqueurs, Fortified Wine**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Small glass bottle 35cl (30p deposit)**
- [2] **Glass bottle (50cl (30p deposit)**
- [3] **Standard glass bottle 70cl (30p deposit)**
- [4] **Large glass bottle 1 litre (30p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying spirits, liqueurs or fortified wine completely [DONTKNOW]
-

[SIMPLE_GRID][RADIO] Q49RTD: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**

Instructions: *For each pack type, please indicate whether you would still buy it and how you would dispose of it*

Rows:

- [1] **Single cans (30p deposit)**
- [2] **Cans / bottles 4 x 250ml multipack (£1.20 deposit)**

- [3] **Cans / bottles 10 x 250ml multipack (£3.00 deposit)**
- [4] **Single bottles 70cl (700ml) (30p deposit)**

Columns:

- [1] I would keep buying this pack type & would always return the containers via the DRS
- [2] I would keep buying this pack type & would sometimes return the containers via the DRS
- [3] I would keep buying this pack type - but would not use the DRS (I would keep disposing of these items in the usual way)
- [4] I would buy this pack type less (i.e. I'd buy a different pack type instead)
- [5] I would stop buying this pack type altogether (i.e. I'd buy a different pack type instead)

Don't know:

- [2] I would stop buying RTDs (pre-mixed spirits or cocktails) completely [DONTKNOW]
-

[NONE] Q50INTRO: **BEER**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q50_1: **Instead of single cans (30p deposit) I would be most likely to buy**

- [1] Cans 4 x 440ml multipack (£1.20 deposit)
 - [2] Cans 4 x 568ml/pint multipack (£1.20 deposit)
 - [3] Cans 10 x 440ml multipack (£3.00 deposit)
 - [4] Single glass bottle 500ml (30p deposit)
 - [5] Single glass bottle 660ml (30p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£3.60 deposit)
 - [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_2: **Instead of 4 x 440ml can multipacks (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
- [2] Cans 4 x 568ml/pint multipack (£1.20 deposit)
- [3] Cans 10 x 440ml multipack (£3.00 deposit)
- [4] Single glass bottles 500ml (30p deposit)

- [5] Single glass bottles 660ml (30p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£3.60 deposit)
 - [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_3: **Instead of 4 x 568ml can multipacks (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 10 x 440ml multipack (£3.00 deposit)
 - [4] Single glass bottles 500ml (30p deposit)
 - [5] Single glass bottles 660ml (30p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£3.60 deposit)
 - [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_4: **Instead of 10 x 440ml can multipacks (£3.00 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml/pint multipack (£1.20 deposit)
 - [4] Single glass bottles 500ml (30p deposit)
 - [5] Single glass bottles 660ml (30p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£3.60 deposit)
 - [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_5: **Instead of 500ml single glass bottles (30p deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
- [2] Cans 4 x 440ml multipack (£1.20 deposit)
- [3] Cans 4 x 568ml/pint multipack (£1.20 deposit)
- [4] Cans 10 x 440ml multipack (£3.00 deposit)
- [5] Single glass bottles 660ml (30p deposit)
- [6] Glass bottles 12 x 330ml multipack (£3.60 deposit)
- [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)

- [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_6: **Instead of 660ml single glass bottles (30p deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml/pint multipack (£1.20 deposit)
 - [4] Cans 10 x 440ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Glass bottles 12 x 330ml multipack (£3.60 deposit)
 - [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_7: **Instead of 12x330ml glass bottle multipack (£3.60 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml/pint multipack (£1.20 deposit)
 - [4] Cans 10 x 440ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Single glass bottles 660ml (30p deposit)
 - [7] Glass bottles 4 x 330ml multipack (£1.20 deposit)
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
-

[RADIO] Q50_8: **Instead of 4x330ml glass bottle multipack (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
- [2] Cans 4 x 440ml multipack (£1.20 deposit)
- [3] Cans 4 x 568ml/pint multipack (£1.20 deposit)
- [4] Cans 10 x 440ml multipack (£3.00 deposit)
- [5] Single glass bottles 500ml (30p deposit)
- [6] Single glass bottles 660ml (30p deposit)
- [7] Glass bottles 12 x 330ml multipack (£3.60 deposit)
- [8] Other, please describe [SPECIFY]
- [9] Don't know

[RADIO] Q50X: **And with the introduction of a 30p Deposit Return Scheme, how do you think this would influence how much beer you buy overall?**

- [1] I will continue to buy the same amount of beer
 - [2] I will buy less beer
 - [3] I will buy more beer
 - [4] I don't know
-

[RADIO] Q51: **Beer**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would buy less beer or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Cider
 - [2] Spirits (e.g. gin, vodka, rum)
 - [3] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [4] Fortified wine (e.g. sherry or port)
 - [5] Wine (including sparkling wine)
 - [6] RTDs (pre-mixed spirits or cocktails)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q52: **Please could you let us know why you think you would buy _____ rather than beer, with the introduction of a 30p deposit return scheme?**

[NONE] Q53: **Cider**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether. What would you buy instead?

[RADIO] Q53_1: **Instead of single cans (30p deposit) I would be most likely to buy**

- [9] Cans 4 x 330ml multipack (£1.20 deposit)
 - [1] Cans 4 x 440ml multipack (£1.20 deposit)
 - [2] Cans 4 x 568ml (pint) multipack (£1.20 deposit)
 - [3] Cans 10 x 440ml multipack (£3.00 deposit)
 - [4] Cans 10 x 330ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_2: **Instead of 4 x 440ml can multipacks (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [9] Cans 4 x 330ml multipack (£1.20 deposit)
 - [2] Cans 4 x 568ml (pint) multipack (£1.20 deposit)
 - [3] Cans 10 x 440ml multipack (£3.00 deposit)
 - [4] Cans 10 x 330ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_3: **Instead of 4 x 568ml (pint) can multipacks (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [9] Cans 4 x 330ml multipack (£1.20 deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 10 x 440ml multipack (£3.00 deposit)
 - [4] Cans 10 x 330ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_4: **Instead of 10 x 440ml can multipacks (£3.00 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
- [9] Cans 4 x 330ml multipack (£1.20 deposit)

- [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml (pint) multipack (£1.20 deposit)
 - [4] Cans 10 x 330ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_5: **Instead of 10 x 330ml can multipacks (£3.00 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [9] Cans 4 x 330ml multipack (£1.20 deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml (pint) multipack (£1.20 deposit)
 - [4] Cans 10 x 440ml multipack (£3.00 deposit)
 - [5] Single glass bottles 500ml (30p deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_6: **Instead of 500ml single glass bottles (30p deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [9] Cans 4 x 330ml multipack (£1.20 deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml (pint) multipack (£1.20 deposit)
 - [4] Cans 10 x 440ml multipack (£3.00 deposit)
 - [5] Cans 10 x 330ml multipack (£3.00 deposit)
 - [6] Plastic bottles 2 litres or 2.5 litres (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_7: **Instead of 2/2.5 litre plastic bottles (30p deposit) I would be most likely to buy**

Settings:

- [1] Single cans (30p deposit)
- [9] Cans 4 x 330ml multipack (£1.20 deposit)
- [2] Cans 4 x 440ml multipack (£1.20 deposit)
- [3] Cans 4 x 568ml (pint) multipack (£1.20 deposit)

- [4] Cans 10 x 440ml multipack (£3.00 deposit)
 - [5] Cans 10 x 330ml multipack (£3.00 deposit)
 - [6] Single glass bottles 500ml (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53_8: **Instead of 4 x 330ml can multipack (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans 4 x 440ml multipack (£1.20 deposit)
 - [3] Cans 4 x 568ml (pint) multipack (£1.20 deposit)
 - [4] Cans 10 x 440ml multipack (£3.00 deposit)
 - [5] Cans 10 x 330ml multipack (£3.00 deposit)
 - [6] Single glass bottles 500ml (30p deposit)
 - [9] Cans 2/2.5 litre plastic bottle (30p deposit)
 - [7] Other, please describe [SPECIFY]
 - [8] Don't know
-

[RADIO] Q53X: **And with the introduction of a 30p Deposit Return Scheme, how do you think this would influence how much cider you buy overall?**

- [1] I will continue to buy the same amount of cider
 - [2] I will buy less cider
 - [3] I will buy more cider
 - [4] I don't know
-

[RADIO] Q54: **Cider**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would buy less cider or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
- [2] Spirits (e.g. gin, vodka, rum)
- [3] Liqueurs (e.g. Baileys, Archers, Sourz)
- [4] Fortified wine (e.g. sherry or port)
- [5] Wine (including sparkling wine)
- [6] RTDs (pre-mixed spirits or cocktails)
- [7] Type of soft drink

- [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q55: **Please could you let us know why you think you would buy _____ rather than cider, with the introduction of a 30p deposit return scheme?**

[NONE] Q56: **Wine (including sparkling wine such as prosecco)**
With the introduction of a 30p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q56_1: **Instead of a standard bottle of wine (30p deposit) I would be most likely to buy**

- [1] Small bottles or cans 18.7cl - 20cl (30p deposit)
 - [2] Boxes 2.25 litres (no deposit)
 - [3] Other, please describe [SPECIFY]
 - [4] Don't know
-

[RADIO] Q56_2: **Instead of small bottles of wine (30p deposit) I would be most likely to buy**

- [1] Standard bottles 75cl (30p deposit)
 - [2] Boxes 2.25 litres (no deposit)
 - [3] Other, please describe [SPECIFY]
 - [4] Don't know
-

[RADIO] Q56X: **And with the introduction of a 30p Deposit Return Scheme, how do you think this would influence how much wine you buy overall?**

- [1] I will continue to buy the same amount of wine
- [2] I will buy less wine
- [3] I will buy more wine

- [4] I don't know
-

[RADIO] Q57: **Wine (including sparkling wine such as prosecco)**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would buy less wine or stop buying it completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
 - [2] Cider
 - [3] Spirits (e.g. gin, vodka, rum)
 - [4] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [5] Fortified wine (e.g. sherry or port)
 - [6] RTDs (pre-mixed spirits or cocktails)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q58: **Please could you let us know why you think you would buy _____ rather than wine, with the introduction of a 30p deposit return scheme?**

[NONE] Q59: **Spirits, Liqueurs, Fortified wine**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q59_1: **Instead of a small single glass bottle 35cl (30p deposit) I would be most likely to buy**

- [1] Glass bottle 50cl (30p deposit)
- [2] Standard glass bottle 70cl (30p deposit)
- [3] Large glass bottle 1 litre (30p deposit)
- [4] Other, please describe [SPECIFY]
- [5] Don't know

[RADIO] Q59_2: **Instead of a glass bottle 50cl (30p deposit) I would be most likely to buy**

- [1] Small glass bottle 35cl (30p deposit)
- [2] Standard glass bottle 70cl (30p deposit)
- [3] Large glass bottle 1 litre (30p deposit)
- [4] Other, please describe [SPECIFY]
- [5] Don't know

[RADIO] Q59_3: **Instead of a standard glass bottle 70cl (30p deposit) I would be most likely to buy**

- [1] Small glass bottle 35cl (30p deposit)
- [2] Glass bottle 50cl (30p deposit)
- [3] Large glass bottle 1 litre (30p deposit)
- [4] Other, please describe [SPECIFY]
- [5] Don't know

[RADIO] Q59_4: **Instead of a large glass bottle 1 litre (30p deposit) I would be most likely to buy**

- [1] Small glass bottle 35cl (30p deposit)
- [2] Glass bottle 50cl (30p deposit)
- [3] Standard glass bottle 70cl (30p deposit)
- [4] Other, please describe [SPECIFY]
- [5] Don't know

[RADIO] Q59X: **And with the introduction of a 30p Deposit Return Scheme, how do you think this would influence the amount of spirits, liqueurs or fortified wine you buy overall?**

- [1] I will continue to buy the same amount of spirits, liqueurs or fortified wine
- [2] I will buy less spirits, liqueurs or fortified wine
- [3] I will buy more spirits, liqueurs or fortified wine
- [4] I don't know

[RADIO] Q60: **Spirits, liqueurs, or fortified wine**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would buy less spirits, liqueurs, or fortified wine or stop buying them completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
 - [2] Cider
 - [3] Wine
 - [4] RTDs (pre-mixed spirits or cocktails)
 - [5] Type of soft drink
 - [6] Other, please describe [SPECIFY]
 - [7] Nothing - I would just buy less
 - [8] Don't know
-

[TEXT] Q61: **Please could you let us know why you think you would buy _____ rather than spirits, liqueurs or fortified wine, with the introduction of a 30p deposit return scheme?**

[NONE] Q62: **Ready to Drink pre-mixed spirits or cocktails (RTDs)**
With the introduction of a 30p deposit DRS scheme, you mentioned that you would stop buying this pack type as often or stop buying it altogether, what would you buy instead?

[RADIO] Q62_1: **Instead of single cans (30p deposit) I would be most likely to buy**

- [1] Cans / bottles 4 x 250ml multipack (£1.20 deposit)
 - [2] Cans / bottles 10 x 250ml multipack (£3.00 deposit)
 - [3] Single glass bottles 70cl (700ml) (30p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q62_2: **Instead of 4 x 250ml can multipacks (£1.20 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans / bottles 10 x 250ml multipack (£3.00 deposit)
 - [3] Single glass bottles 70cl (700ml) (30p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q62_3: **Instead of 10 x 250ml can multipacks (£3.00 deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans / bottles 4 x 250ml multipack (£1.20 deposit)
 - [3] Single glass bottles 70cl (700ml) (30p deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q62_4: **Instead of a single 70cl bottle (30p deposit) I would be most likely to buy**

- [1] Single cans (30p deposit)
 - [2] Cans / bottles 4 x 250ml multipack (£1.20 deposit)
 - [3] Cans / bottles 10 x 250ml multipack (£3.00 deposit)
 - [4] Other, please describe [SPECIFY]
 - [5] Don't know
-

[RADIO] Q62X: **And with the introduction of a 30p Deposit Return Scheme, how do you think this would influence the amount of Ready to Drink pre-mixed spirits or cocktails you buy overall?**

- [1] I will continue to buy the same amount of RTDs
 - [2] I will buy less RTDs
 - [3] I will buy more RTDs
 - [4] I don't know
-

[RADIO] Q63: **RTDs**

With the introduction of a 30p deposit DRS scheme, you mentioned that you would buy less RTDs or stop buying them completely. What, if anything, do you think you would be most likely to buy instead?

- [1] Beer
 - [2] Cider
 - [3] Spirits (e.g. gin, vodka, rum)
 - [4] Liqueurs (e.g. Baileys, Archers, Sourz)
 - [5] Fortified wine (e.g. sherry or port)
 - [6] Wine (including sparkling wine)
 - [7] Type of soft drink
 - [8] Other, please describe [SPECIFY]
 - [9] Nothing - I would just buy less
 - [10] Don't know
-

[TEXT] Q64: Please could you let us know why you think you would buy _____ rather than RTDs, with the introduction of a 30p deposit return scheme?

[TEXT] Section5IntroQ: You indicated that with the introduction of a Deposit Return Scheme you might start buying bigger bottles or cans (for beer, cider or RTDs)

Please could you let us know why you expect to start buying bigger cans/bottles with the introduction of a DRS?

(E.g. 440ml cans instead of 330ml bottles or single large bottles rather than a multipack of smaller cans or bottles)

[NONE] Section5_Intro: **Please could you let us know what you think you would typically do in the following scenario/s?**

[RADIO] Q65: **Scenario: Beer or Cider [Only shown to those stating this intention]**
You bought a multipack of 440ml cans instead of a multipack of 330ml bottles or cans.
Thinking about the typical situations when you would drink these, which of the following best describes what you would do?

- [1] I would drink the same number of 440ml cans as I would 330ml cans/bottles
 - [2] I would drink fewer 440ml cans than I would 330ml cans/bottles
 - [3] I would drink more 440ml cans than I would 330ml cans/bottles
 - [4] Don't know
-

[RADIO] Q66: **Scenario: Beer or Cider [Only shown to those stating this intention]**
You bought some single 500ml bottles instead of your usual multipacks of 440ml or 330ml cans or bottles.
Thinking about the typical situation when you would drink these, which of the following best describes what you would do?

- [1] I would drink the same number of 500ml bottles as I would 440ml or 330ml cans or bottles

- [2] I would drink fewer 500ml bottles than I would 440ml or 330ml cans or bottles
 - [3] I would drink more 500ml bottles than I would 440ml or 330ml cans or bottles
 - [4] Don't know
-

[RADIO] Q67: **Scenario: Beer [Only shown to those stating this intention]**

You bought some single 660ml bottles instead of your usual multipacks of 440ml or 330ml cans or bottles.

Thinking about the typical situations when you would drink these, which of the following best describes what you would do?

- [1] I would drink the same number of 660ml bottles as I would 440ml or 330ml cans or bottles
 - [2] I would drink fewer 660ml bottles than I would 440ml or 330ml cans or bottles
 - [3] I would drink more 660ml bottles than I would 440ml or 330ml cans or bottles
 - [4] Don't know
-

[RADIO] Q68: **Scenario: Ready to Drink pre-mixed spirits or cocktails (RTDs) [Only shown to those stating this intention]**

You bought a single bottle 70cl (700ml) rather than usual multipack of cans or bottles. Overall how do you think it would be likely to affect how much you drink?

- [1] I think I would drink more
 - [2] I think I would drink about the same
 - [3] I think I would drink less
 - [4] Don't know
-

[SIMPLE_GRID][RADIO] Q69: **To what extent do you agree or disagree with the following statements**

Rows:

- [1] **Once I open a bottle of wine, I tend to finish it**
- [2] **I buy certain pack types to control how much I drink**
- [3] **I find it harder to control how much cider I drink when it is in large plastic bottles**

Columns:

- [1] Strongly Agree
- [2] Tend to agree
- [3] Neither agree nor disagree
- [4] Tend to disagree

- [5] Strongly disagree
- [6] Don't know/not applicable

Don't know:

[TEXT] Q70: **You mentioned that you buy certain pack types to control how much you drink. How if at all do you think the introduction of a Deposit Return Scheme may affect this?**

[RADIO] Q71: **Which of the following best describes what you think you would do with vouchers received for returning alcoholic drinks containers?**

- [1] I'd save them up to redeem against general grocery shopping
- [2] I'd save them up to redeem against other alcohol purchases
- [3] I'd return my containers, collect the voucher and use straight away against other grocery shopping
- [4] I'd return my containers, collect the voucher and use straight away against other alcohol purchases
- [5] Other, please describe [SPECIFY]
- [6] Don't know
- [7] Not applicable - I would not use the scheme for alcoholic drinks containers

[SIMPLE_GRID][RADIO] Q72: **And to what extent do you agree or disagree with these statements regarding the Deposit Return Scheme?**

Rows:

- [1] **It's unfair that I would be forced to use this scheme to get my deposit back**
- [2] **I would worry that other people would judge me based on the number or types of alcohol containers I might return**
- [3] **I feel resentful that this scheme is being introduced when I already recycle**
- [4] **I feel it would encourage me to recycle empty alcoholic drinks containers consumed at home more**
- [5] **I feel it would encourage me to recycle empty alcoholic drinks containers consumed away from home more (e.g. picnic, park, train)**

Columns:

- [1] Strongly Agree
- [2] Tend to agree
- [3] Neither agree nor disagree
- [4] Tend to disagree
- [5] Strongly disagree
- [6] Don't know

Don't know:

[CHECKBOX] Q73: Thinking about the Deposit Return Scheme in relation to the alcoholic drinks you buy from retailers. If you were to return containers through the DRS (rather than recycling/disposing in your normal way), what would be your reasons to do so?

Instructions: Please select all that apply

- [1] To get my deposit back
 - [2] Everyone else will be doing it/it will become the norm
 - [3] It will help increase the number of bottles and cans that are recycled
 - [4] It will help reduce litter
 - [5] It will reduce contamination in recycling
 - [6] It will help the environment
 - [7] It would be the right thing to do
 - [8] Other, please describe [SPECIFY]
 - [9] Don't know
 - [10] Not applicable - I would not use the scheme for alcoholic drinks containers
-

[RADIO] Q74: And what would be your main reason to do so? (For returning containers through the DRS rather than recycling/disposing in your normal way)

- [1] To get my deposit back
- [2] Everyone else will be doing it/it will become the norm
- [3] It will help increase the number of bottles and cans that are recycled
- [4] It will help reduce litter
- [5] It will reduce contamination in recycling

- [6] It will help the environment
 - [7] It would be the right thing to do
 - [8] [[Q73_8 : SP]]
-

[SIMPLE_GRID][RADIO] Q75: **And how easy would you find this scheme in terms of fitting into your everyday life?**

Rows:

- [1] **Storing empty alcoholic drinks containers**
- [2] **Transporting the empty alcoholic drinks containers**
- [3] **Finding the time to return containers**
- [4] **Remembering to take empty containers to return**

Columns:

- [1] Very easy
- [2] Fairly easy
- [3] Fairly difficult
- [4] Very difficult
- [5] Don't know

Don't know:

[NONE] Q76Intro: **How do you currently dispose of alcoholic drink containers?**

[RADIO] Q76: **At home**

- [1] I recycle all of them through collected kerbside recycling
 - [2] I put some in recycling and some in general waste
 - [3] I put them all in the general waste
 - [4] Other e.g. go to skip (please describe) [SPECIFY]
 - [5] Don't know/Not applicable
-

[RADIO] Q76_1: **Out of home (e.g. picnic, beach, train)**

- [1] I bring them home to be recycled

- [2] I sometimes bring them home to recycle and sometimes put it in general waste bins
 - [3] I put them all in the general rubbish/waste
 - [4] Other e.g. go to skip (please describe) [SPECIFY]
 - [5] Don't know/Not applicable
-

[NONE] QClassIntro: **Now just some questions about yourself**

[RADIO] Q77: **What type of accommodation do you live in?**

- [1] Detached house
 - [2] Semi-detached house
 - [3] Mid-terraced house
 - [4] Flat
 - [5] Room in shared house
 - [6] Bedsit
 - [7] Other, please describe [SPECIFY]
-

[RADIO] Q78: **How would you describe where you live?**

- [1] Urban
 - [2] Suburban
 - [3] Rural
 - [4] Semi-rural
 - [5] Don't know
-

[CHECKBOX] Q79: **Who else lives in your household?**

Instructions: Please select as many options as apply

- [1] I live on my own
- [2] Partner / spouse
- [3] Parent(s) / In-laws
- [4] Grandparent(s)
- [5] Child / children (aged under 18)
- [6] Adult children (aged 18+)
- [7] Grandchild / grandchildren (aged under 18)

- [8] Grandchild / grandchildren (aged 18+)
 - [9] Other separate tenant(s) e.g. flatmates
 - [10] Other, please specify [SPECIFY]
-

[NUMERIC] Q80: **And how many people live in your house in total?**

[RADIO] Q81: **What is your total household annual income, before tax or deductions, (but including any benefits)?**

- [1] Less than £249 a week / less than £1099 a month / less than £13,199 a year
 - [2] £250 to £449 a week / £1100 to £1979 a month / £13,200 to £23,749 a year
 - [3] £450 to £649 a week £1980 to £2859 a month /£23,750 to £34,299 a year
 - [4] £650 to £849 a week / £2860 to £3739 a month / £34,300 to £44,899
 - [5] £850 or more a week / £3740 or more a month / £44,900 or more per year
 - [6] Prefer not to say
-

[NUMERIC] Q82: **And how many income earners are there in your household? (Excluding those who are dependent on benefits)**

[RADIO] Q83: **Which of the following best reflects your personal financial situation?**

- [1] I am comfortably well off
 - [2] I am managing well enough
 - [3] I am just about managing
 - [4] I have minor financial difficulties
 - [5] I have major financial difficulties
 - [6] Don't know/Prefer not to say
-