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Zusammenarbeit (GIZ) GmbH



SURVEY ON RECYCLING IN BELGRADE

Belgrade: December 2021.

CONTENT

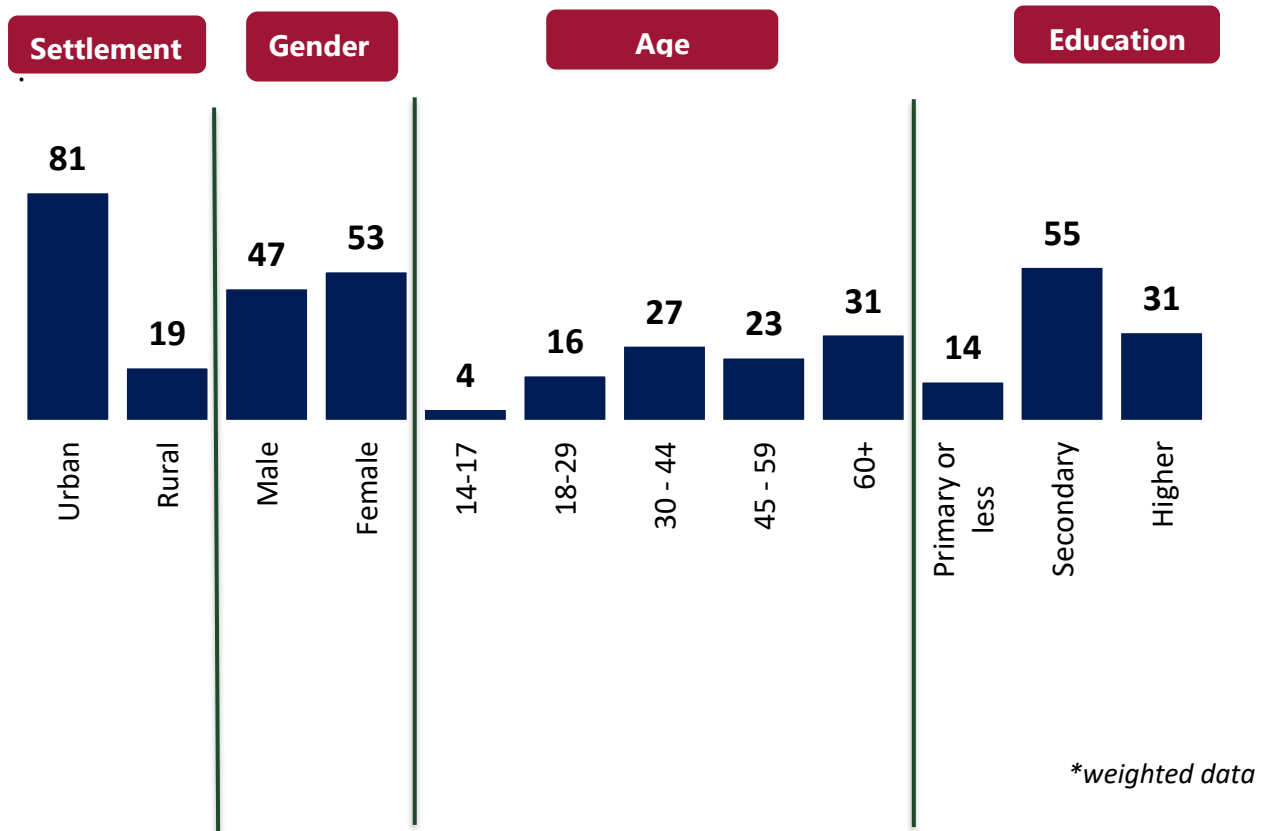
I. METHODOLOGY	2
SAMPLE STRUCTURE.....	3
I. KEY FINDINGS	4
II. RECYCLING IN GENERAL	5
III. RECYCLING CANS	11

I. METHODOLOGY

The complete methodology of this survey is depicted in more detail in the table below.

Field research:	November-December, 2021
Sample universe:	Population of Belgrade, 14+
Sample size:	804
Type of sample:	Two-stage stratified representative random sample with quota selection of respondents <ul style="list-style-type: none">• Stratification was based on: Municipality and Type of settlement based on administrative decision (urban and rural);• Quotas by gender and age
Post-stratification:	By municipality, type of settlement, gender, age,
Method of data collection:	Mixed mode (telephone and online)

SAMPLE STRUCTURE



I. KEY FINDINGS

High interest in recycling overall. Furthermore, all citizens perceive recycling as important. **The potential for recycling is highest among younger population (up to 29 y.o.)** and among those who purchase in Idea stores often or almost always.

In addition, interest in smart can recycling also prevails. Most of non-users (73%) are interested to start Smart Can Recycling. **Store distance is perceived as important driver** for recycling. In addition, **not having available containers nearby is the main reason against the recycling.**

Citizens mostly separate or plan to separate waste out of conviction. On the other hand, certain benefits for recycling waste are mostly drivers for youth. Refund through deposit, shopping discounts and cinema/theater tickets are perceived as most attractive benefits.

About **one quarter of Belgrade population heard about smart presses in Idea stores. Those who often or always purchase products in Idea stores, significantly more often** (one third of them).

Media is the most common source of information about Smart Can Recycling Campaign in IDEA stores.

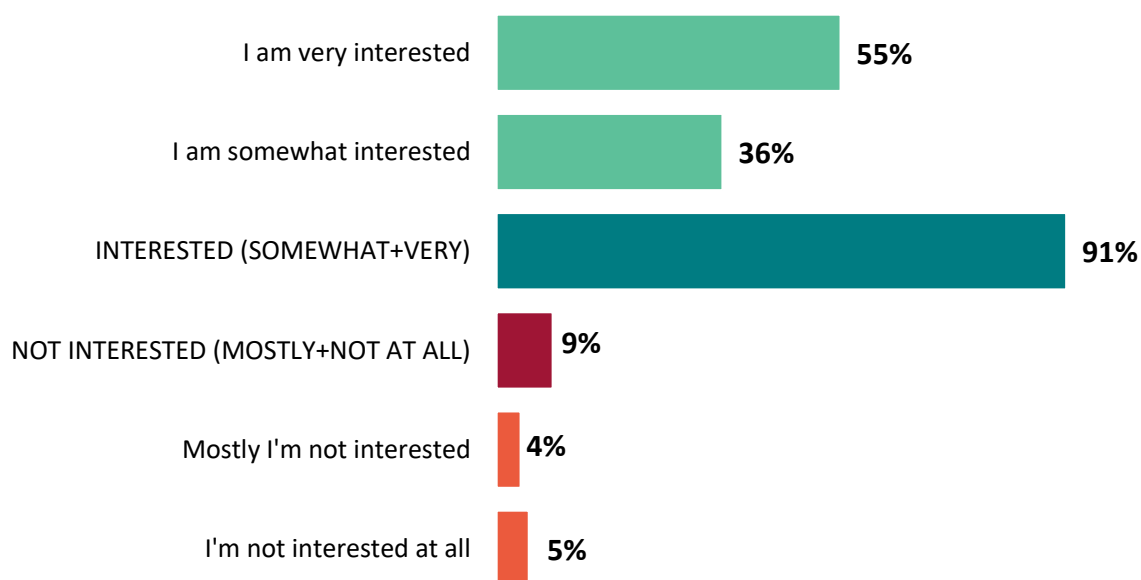
Usage of web application for collecting points via smart presses. Among, those who heard about Smart Can Recycling Campaign in IDEA stores, there are only 6% of web application users, which presents about 1% of total target population.

II. RECYCLING IN GENERAL

Overall, the interest in recycling is high. Vast majority of Belgrade citizens are interested in topic (91%). More precisely, over half of citizens are very interested (55%), while additional third are somewhat interested in recycling. On the other hand only 9% of citizens in Belgrade stated not to be interested.

Interest in recycling is significantly higher among younger population, 18- 29 y.o. (97%) compared to the elders, 60+ (86%), as well as among those with higher education (96%), compared to those with primary (84%) and secondary education (86%). On the other hand, Idea store non visitors are significantly less interested compared to others (86%).

Graph 2.1. Interest in recycling



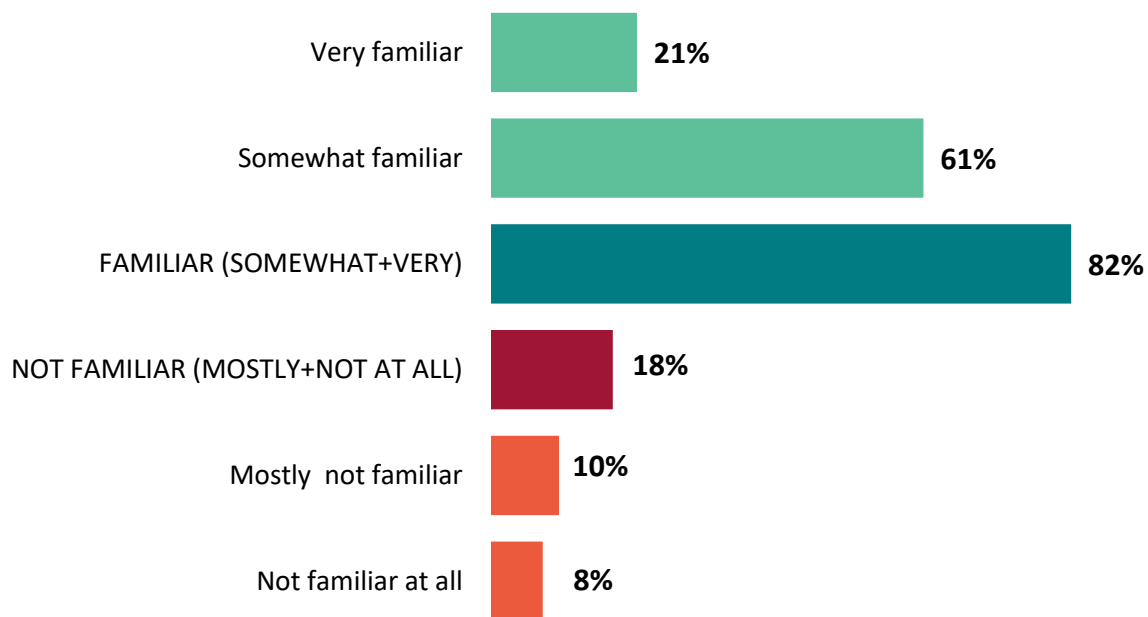
To what extent are you personally interested in the topic of recycling?

Base: Total target population

Four in five citizens in Belgrade (81%) believes to be familiar about the recycling, but only one in five are very familiar (21%), while over half of Belgrade citizens are somewhat familiar with recycling (61%). On the other hand, less than one fifth of citizens in Belgrade reported not to be familiar (18%).

Awareness is higher among younger population, 18-29 y.o. (93%), as well as among those with higher education (88%), compared to those with primary (75%) and secondary education (81%). Additionally, those with higher monthly income (88%), as well as those who shop more often at Idea stores (87%) are also more familiar with recycling, compared to those with lower incomes and those who rarely shop at Idea stores. On the other hand, awareness is significantly lower in rural areas (70%).

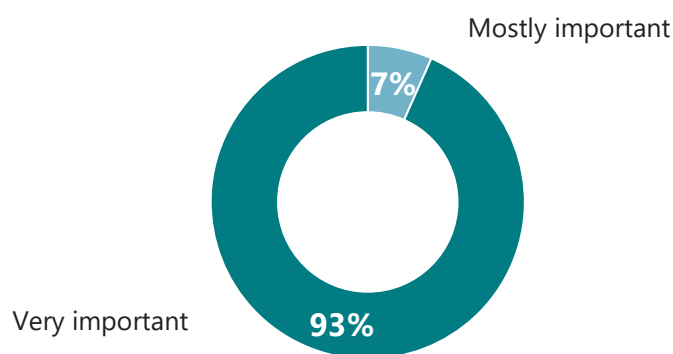
Graph 2.2. Awareness about recycling



*To what extent are you familiar with the topic of recycling?
Base: Total target population*

There are no citizens in Belgrade who do not believe that recycling is important. Moreover, only 7% believe that is mostly important, while 93% of citizens state that recycling is very important.

Graph 2.3. Importance of recycling



*In your opinion, How important is to recycle waste?
Base: Total target population*

A half of citizens in Belgrade (51%), state that they separate recyclable waste. In addition, about 40% plan to recycle in the future. On the other hand, only 8% doesn't separate recyclable waste, nor plan to do so in the future.

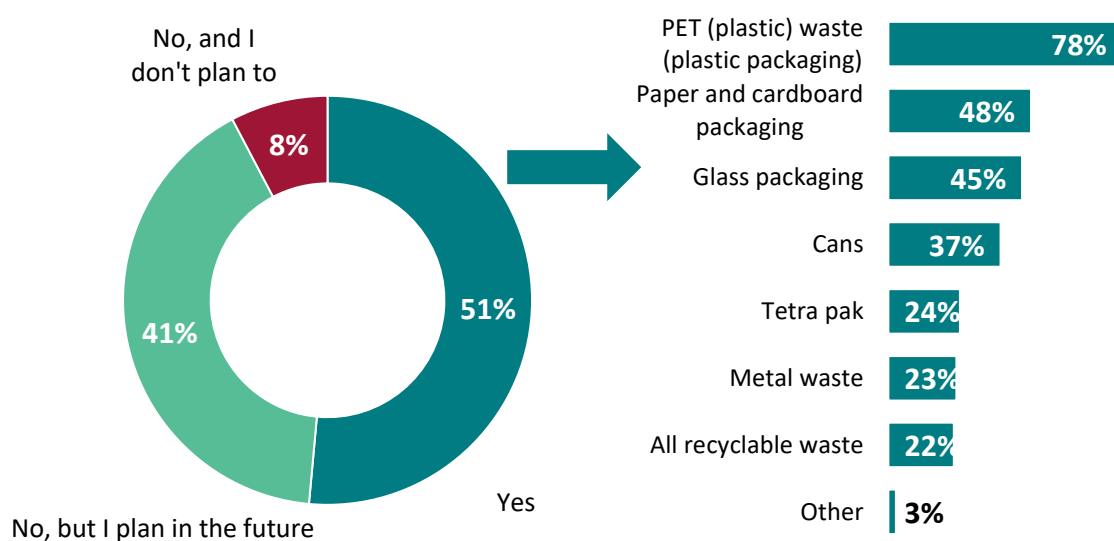
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Older citizens, 60+ (16%), as well as those with low education (14%) more often report that do not separate waste or they plan to do so in the future. In addition, respondents who rarely purchase products in Idea stores also more often state that they do not plan to separate waste in the future (11%).

Among those who reported that they separate recyclable waste, PET (plastic) waste has been mentioned most often (78%), but almost half of them also mention paper (48%) and glass (45%). Over a third of citizens reported to recycle cans in some way (37%).

Younger citizens significantly more often recycle cans compared to others, 14-17 (67%) and 18-29 (54%). The same is true about those with higher monthly incomes (51%)

Graph 2.4. Intention to recycle in the future



*Do you personally separate recyclable waste?
Base: Total target population*

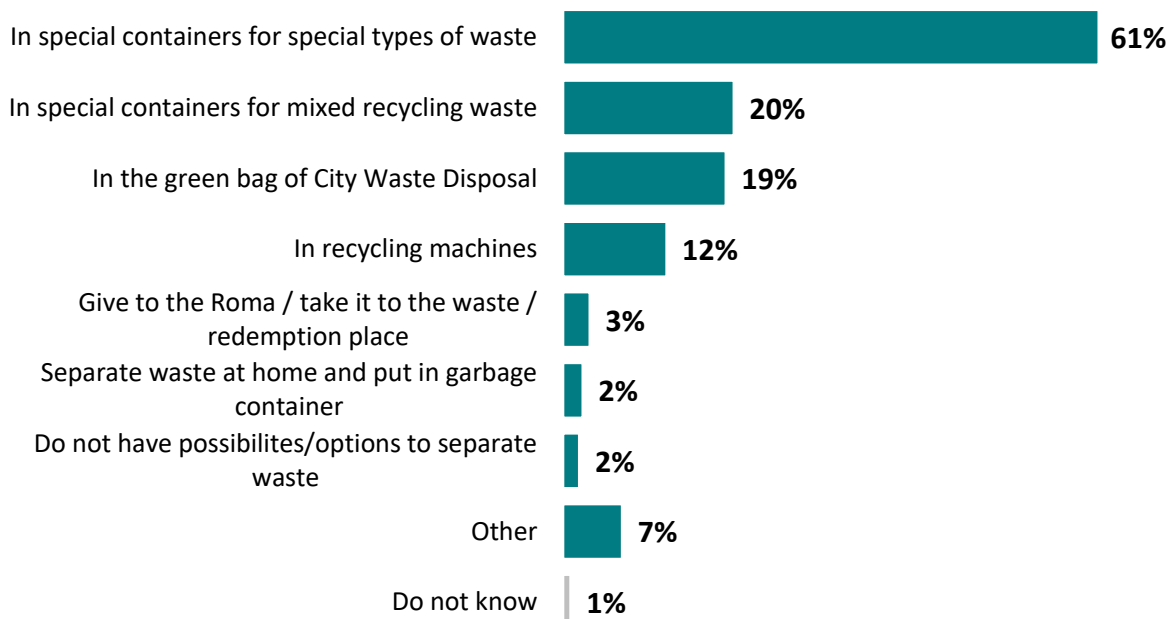
*What kind of waste do you separate?
Base: Those who separate recyclable waste
(51% of target population) MULTIPLE ANSWERS*

In most cases (61%), special containers for specific types of waste are reported as the most common places where citizens separate recyclable waste. Special containers for mixed recycling waste are mentioned in second place (20%). Green bag initiative is mentioned by 19% of citizens who recycle. Recycling machines are mentioned in 12% of cases.

Younger citizens, 18-29 y.o. significantly more often separate waste in recycling machines (36%), compared to others, and especially those over 60 years of age (1%). People living in central Belgrade municipalities more often use recycling machines (24%) and those who often shop in Idea stores (21%).

Graph 2.5. Waste separation location

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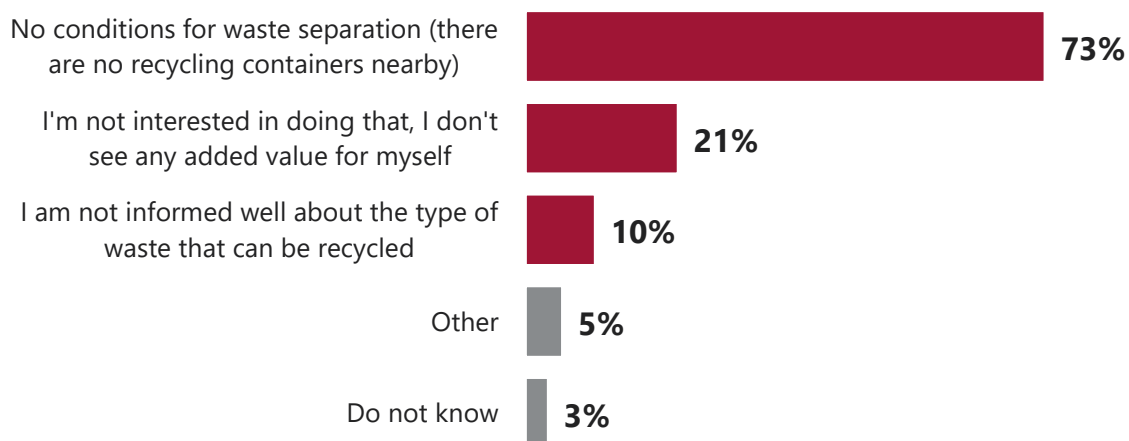


Where do you separate recycling waste?

Base: Those who separate recyclable waste (51% of target population) MULTIPLE ANSWERS

Lack of conditions for waste separation is the main reason against recycling, among those who do not separate waste (73%). Aside from that 21% is not interested in recycling, while 10% stated that they are not informed well enough.

Graph 2.6. Reasons against recycling

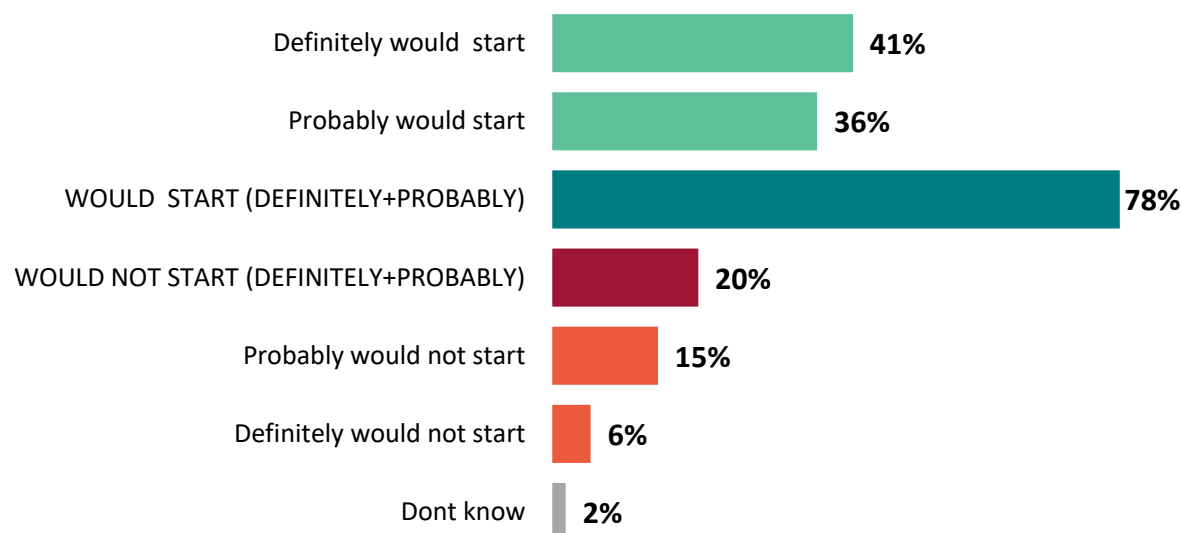


Why don't you separate recycling waste?

Base: Those who do not separate recyclable waste and do not plan to (8% of target population) MULTIPLE ANSWERS

Nevertheless, even those who mentioned that they are not recycling nor the intend to do so in the future for the most part believe that they would start recycling if people from their environment started recycling. (78%), while only one in five (20%) would not start even in such a case.

Graph 2.7. Driver for recycling - If people from environment (colleagues, family friends) started recycling



If people from your environment (colleagues, family friends) started recycling, would you start recycling?

Base: Those who do not separate recyclable waste and do not plan to (8% of target population)

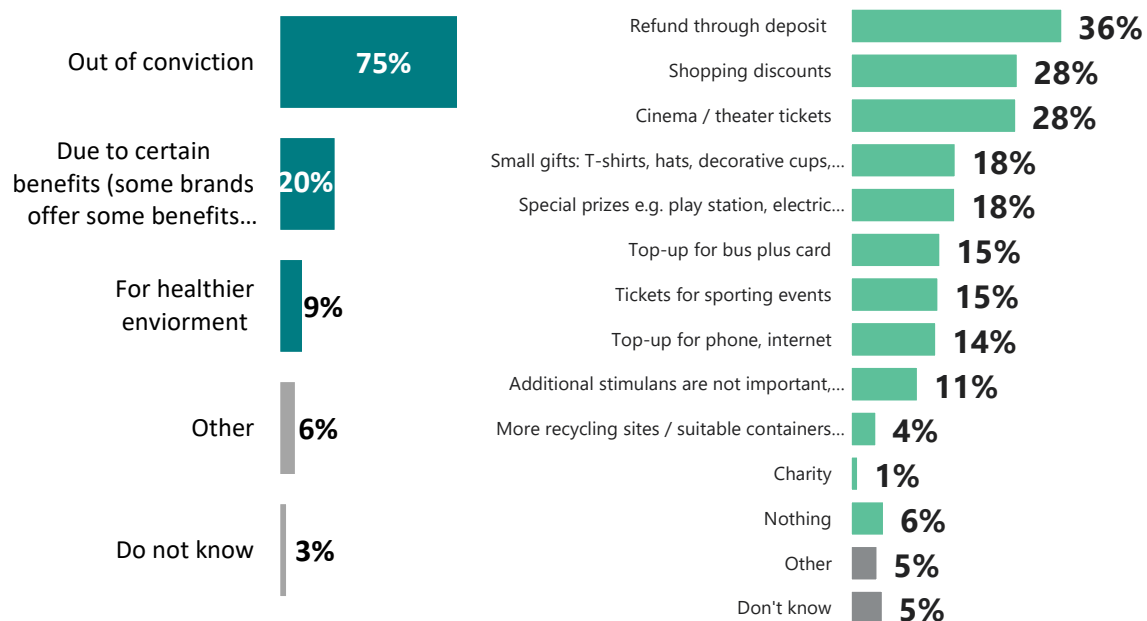
Among those who separate/plan to separate recyclable waste, conviction is the main driver for recycling (75%). On the other hand, additional benefits that some brands offer if their products are recycled are mentioned less often (20%).

Men slightly more often report to recycle out of conviction (79%), compared to women (72%). On the other hand, additional benefits are significantly more often drivers for younger population, 14-17 (37%) and 18- 29 y.o. (31%), as well as for those with lower education (33%). The same is true for those who more often shop in Idea stores (28%).

Refund through deposit is perceived as the most attractive benefit (36%) that would stimulate citizens to recycle waste, specifically cans, as well as shopping discounts and cinema/theater tickets follows (both 28%).

Women are significantly more interested in cinema/theater tickets (33%), compared to men (22%). On the other hand, men are more interested in top up for phone and internet (17%), compared to women (12%). Furthermore, younger population (14-17 and 18-29) more interested in all tested benefits, compared to older population.

Graph 2.8. Drivers for recycling



Why do you separate / plan to separate recyclable waste?

Base: Those who separate/plan to separate recyclable waste (92% of target population); MULTIPLE ANSWERS

What would most stimulate you to separate certain waste, specifically cans?

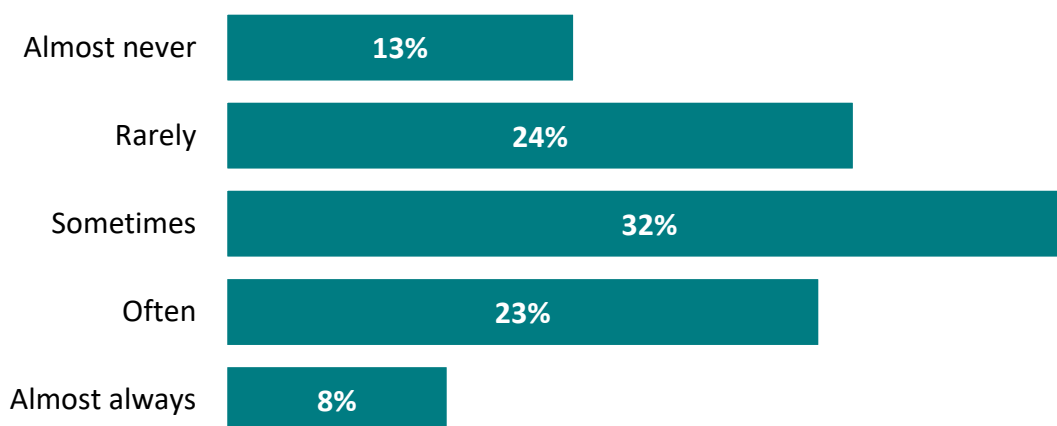
Base: Total target population; MULTIPLE ANSWERS

III. RECYCLING CANS

About one third of Belgrade citizens (32%), buys products in Idea stores often or almost always. On the other hand, slightly over a third of citizens (37%), rarely or almost never buys products in Idea stores.

Citizens from central Belgrade municipalities (41%) and younger population 18-29 y.o. (42%) more often shops in Idea stores. On the other hand, elder citizens (60+), significantly less often shop regularly in Idea stores compared to others (23%).

Graph 3.1. Purchase in IDEA stores



*How often do you buy products in IDEA stores?
Base: Total target population*

One in four citizens in Belgrade reported that they heard about smart recycling presses in Idea stores. Those who often or always buy products in Idea stores, significantly more often report the same (33%) compared to others.

Graph 3.2. Smart presses awareness



*Have you heard of smart presses where you can recycle cans, which are found in some IDEA stores?
Base: Total target population*

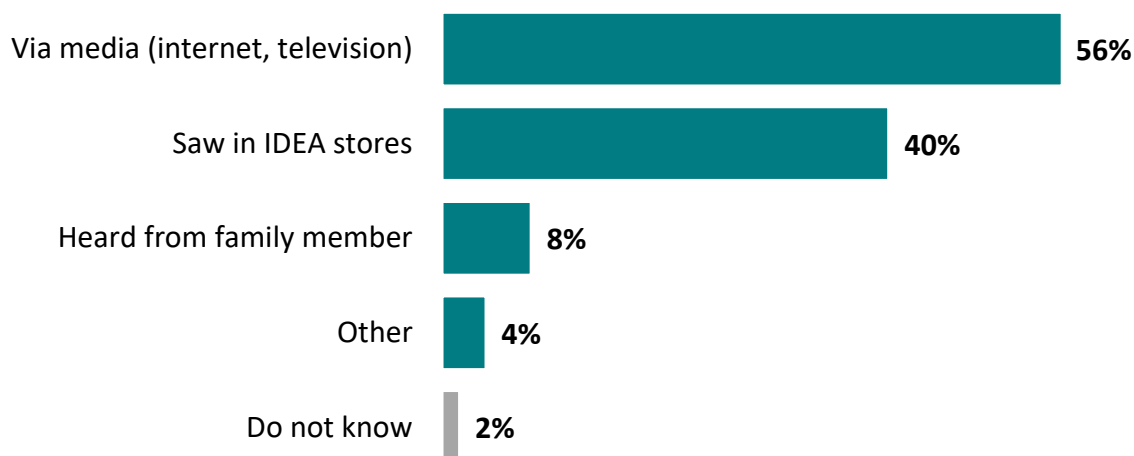
Base: Those who often or almost always purchase products in IDEA stores (31% of target population)

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Among those who heard about Smart Can Recycling Campaign in IDEA stores, media is the most common source of information about it (56%). Four in ten citizens reported that they saw the Smart recycling presses in Idea stores(40%). Additional 8% heard about the Smart Can Recycling presses from a family member.

Elder citizens, 60+ (20%) and those who purchase in Idea stores rarely (17%), significantly less often heard about the campaign in Idea stores, compared to the total population (40%).

Graph 3.3. Source of information about Smart presses

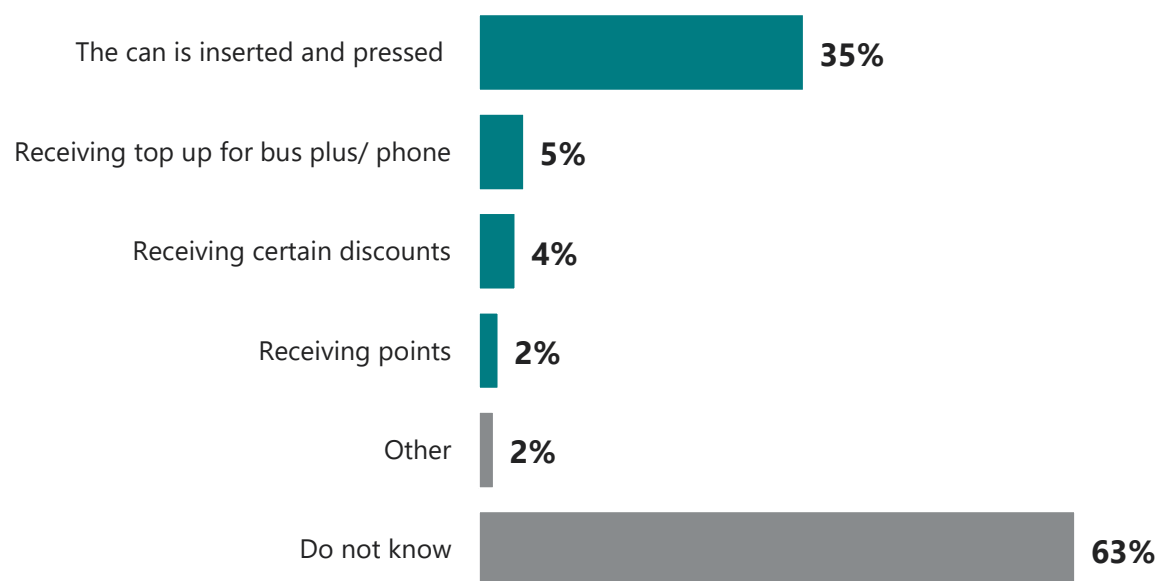


Where did you hear about this initiative?

Base: Those who heard about Smart Can Recycling Campaign in some IDEA stores (25% of target population) MULTIPLE ANSWERS

Lack of knowledge about how smart presses work prevails. Among those who heard about the campaign, 63% of citizens mentioned that they are not aware of how the presses work, while a third of them can only provide a quite vague description (35%) About 5% of citizens provides an answer that cast a doubt on whether they can distinguish smart presses in Idea stores from the presses made by the competition. Finally, only 6% of those who reported that they heard about smart recycling presses can to some degree describe how the presses actually work.

Graph 3.4. Functioning of smart presses

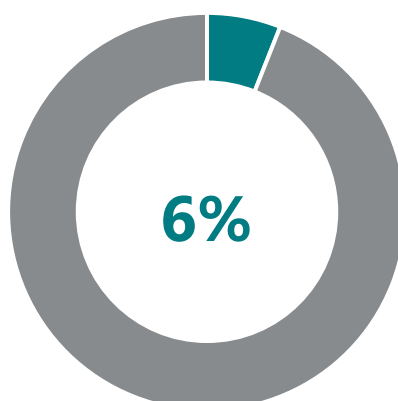


How do these smart presses work?

Base: Those who heard about Smart Can Recycling Campaign in some IDEA stores (25% of target population) MULTIPLE ANSWERS

Among, those who heard about Smart Can Recycling Campaign in IDEA stores, only 6% of citizens actually reported to use the web application. This represents only 1% of total target population (citizens of Belgrade aged 14 and over).

Graph 3.5. Web application usage

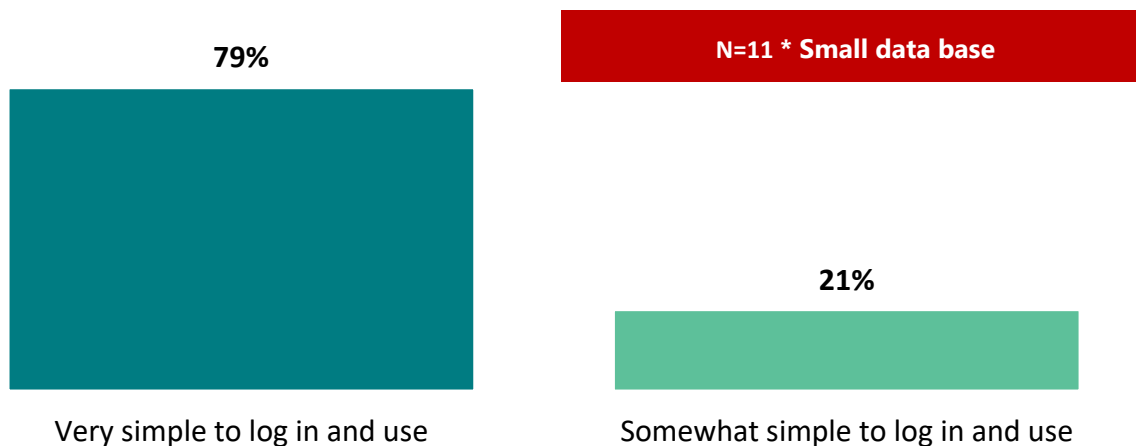


Are you a user of a web application through which you collect points by inserting cans into smart presses?

Base: Those who heard about Smart Can Recycling Campaign in some IDEA stores (25% of target population)

All users describe the application as simple and clear to use.

Graph 3.6. Web application simplicity

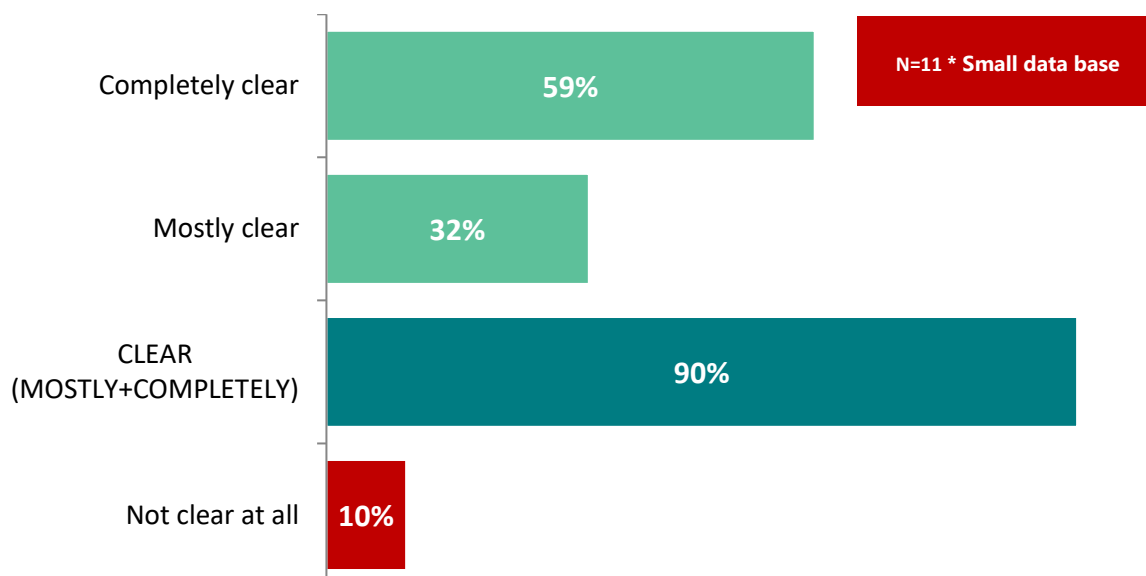


How would you rate the web application, when it comes to the ease of logging in and using the web application?

Base: Those who use web application for collecting points by inserting cans into smart presses (1% of target population)

Among them, only 10% reported that the way in which the application works and points are collected is not clear, while 90% believes it is.

Graph 3.7. Web application clarity

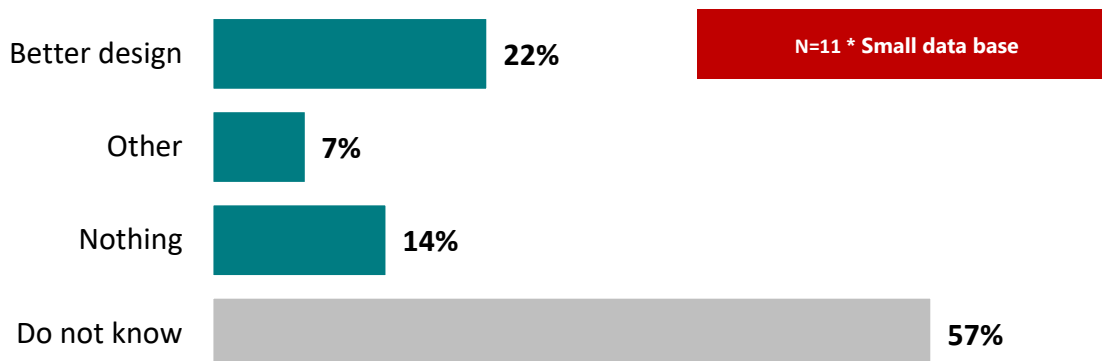


Do you understand the mechanism for collecting points?

Base: Those who use web application for collecting points by inserting cans into smart presses (1% of target population)

There were no concrete proposals to improve the application itself, only a vague suggestion for better design.

Graph 3.8. Suggestions for Web application improvement



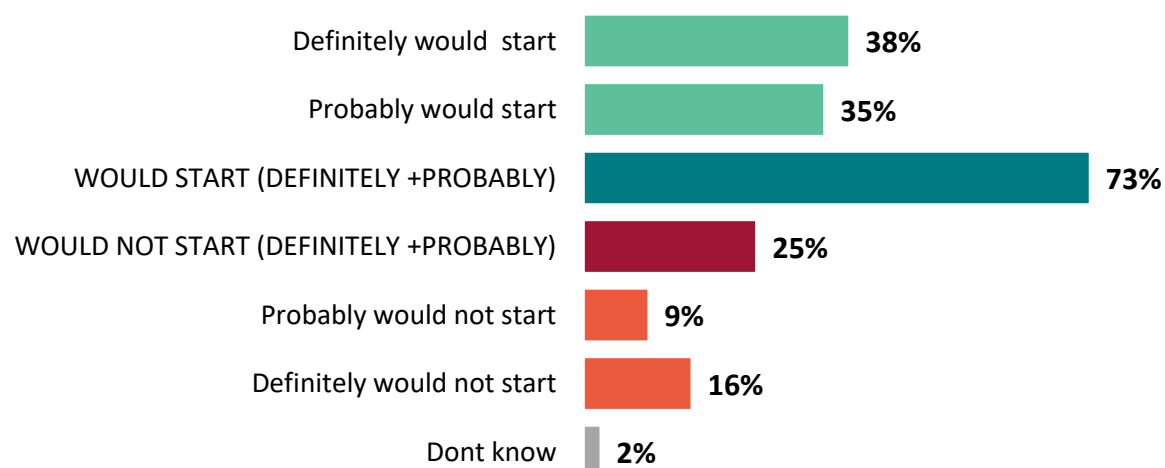
Do you have any suggestions for improving the app itself?

Base: Those who use web application for collecting points by inserting cans into smart presses (1% of target population) MULTIPLE ANSWERS

High interest in can recycling is registered among those who did not hear about Smart Can Recycling (73%). A third reported that they would definitely start using the presses (38%), while additional third mentioned that they would probably start using them (35%). On the other hand, every fourth citizen who did not hear about Smart Can Recycling is not willing to consider starting to recycle (25%).

Interest is significantly higher among citizens 18-29 y.o. (93%) and 33-44 y.o. (85%), and significantly lower among elder citizens, 60+ (52%). In addition, those who often or almost always shop in Idea stores are significantly more interested (81%), compared to those who rarely visits Idea stores (65%).

Graph 3.9. Interest in Smart Can Recycling/Non-users



Would you be interested in collecting cans which you would insert into smart presses, and collect points that would allow you additional discounts when shopping?

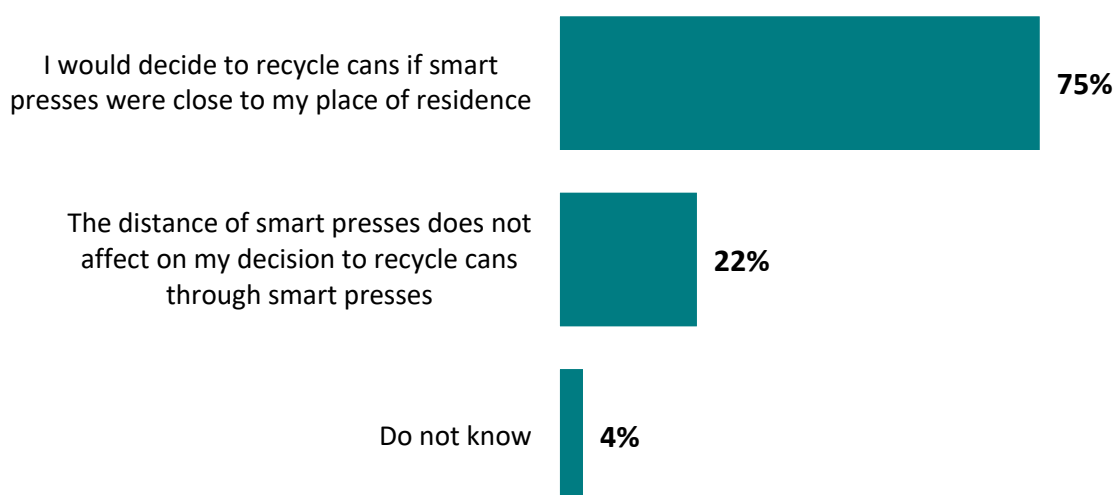
Base: Those who did not hear about Smart Can Recycling Campaign and those who do not use web application for collecting points by inserting cans into smart presses (99% of target population)

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Store distance is perceived as important driver for smart can recycling. Three quarters of citizens who does not recycle, would consider starting if the stores are closer. On the other hand, one in five citizens stated that the distance does not affect their decision to start recycling.

Store distance is slightly less important for citizens 30-44 y.o. (70%). Store distance is significantly more important to younger respondents, 18-29 y.o. (84%), compared to those over 60 years of age(70%). The same is true for those who sometimes shop at Idea stores (80%), compared to those who rarely shop there (69%).

Graph 3.10. Store distance as driver to use Web app for Smart Can Recycling



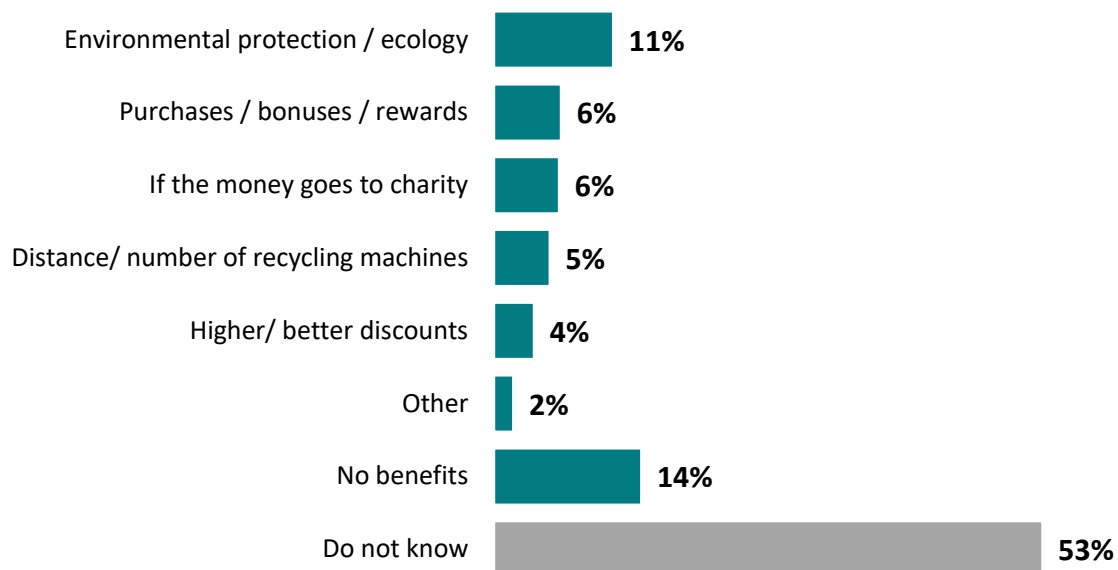
How much would the distance to the IDEA stores where these smart presses are located affect your decision to start recycling cans?

Base: Those who did not hear about Smart Can Recycling Campaign and do not use web application for collecting points by inserting cans into smart presses (99% of target population)

Citizens who heard about smart presses, but do not use them are for the most part without concrete ideas regarding benefits that would stimulate them to start recycling. Besides various rewards (6%) and higher discounts (4%) about 6% of citizens mentioned the option for the money to go to charity.

Women more often see no benefits that would stimulate them to start recycling (19%), compared to men (8%). In addition, men significantly more often mentioned various rewards as drivers for recycling (10%), compared to women (3%).

Graph 3.11. Web app for Smart Can Recycling/Drivers for usage



*Are there any other benefits that would make you start collecting cans and use start presses?
Base: Those who heard about Smart Can Recycling Campaign and do not use web application for collecting points by inserting cans into smart presses (23% of target population)*