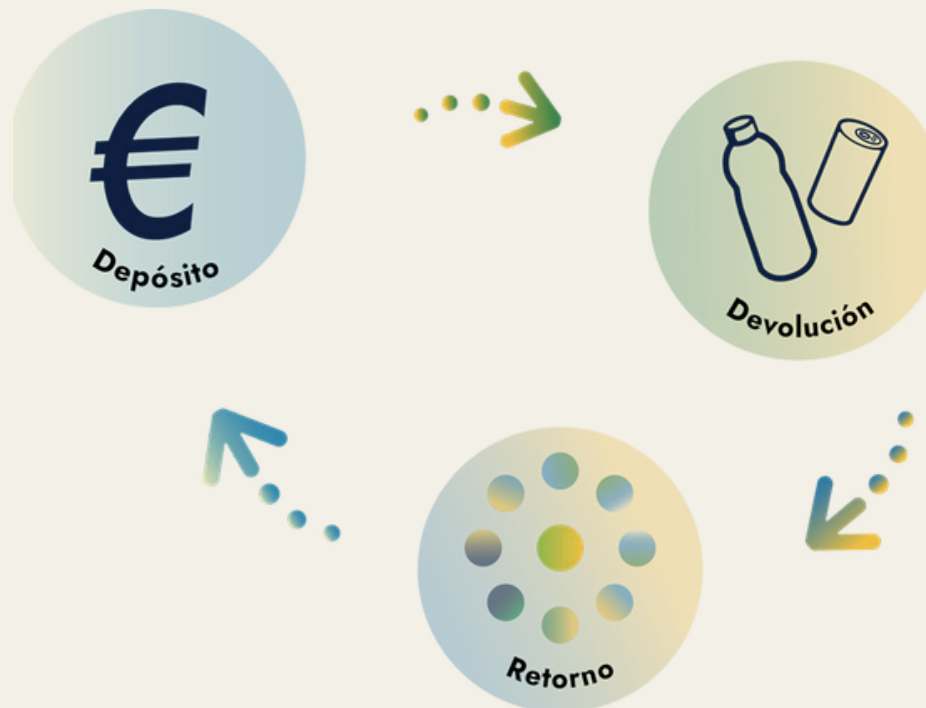




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EXECUTIVE SUMMARY

CONSUMERS' VIEWS ON THE IMPLEMENTATION OF THE DRS

Consumer Perception Study on the Future Implementation of the Deposit Return System (DRS) in Spain





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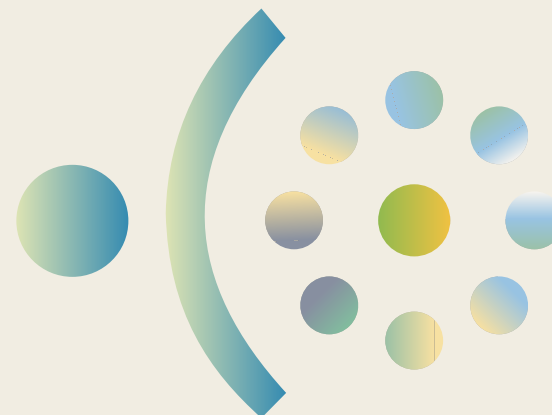
1. CONTEXT



Both in the European Union and in Spain, legislation seeks to curb the exponential growth of packaging waste by promoting models that favour their reuse and recycling.

The **European Packaging and Packaging Waste Regulation (PPWR)** establishes that, before 1 January 2029, the necessary measures will be put in place to ensure the separate collection of at least 90% by weight, per year, of single-use plastic bottles for beverages with a capacity of up to 3 litres and single-use metal containers for beverages with a capacity of up to 3 litres.

The main objective of the **Deposit Return System (DRS)** is to ensure the large-scale recovery of high-quality packaging for recycling, guaranteeing compliance with the legal targets that the current separate collection system has not managed to achieve.



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2. INTRODUCTION



The implementation of the future **Deposit Return System (DRS)** will represent a significant transformation in the management of packaging and packaging waste in Spain.

In a context marked by new regulatory requirements aimed at increasing separate collection and recycling rates, it is essential to **understand consumers' perception, level of awareness, and willingness to adopt this new system.**

With this purpose, HISPACOOP has conducted a nationwide study to **analyse the level of acceptance of the Deposit Return System (DRS)** and its potential impact on **purchasing, consumption, and recycling habits.** The research identifies the main **concerns, barriers, and motivations** of consumers or users, as well as the main **difficulties and aspects for improvement** that will need to be addressed

in order to support the effective implementation of the system, optimise the management of packaging waste covered by the DRS, and promote greater public participation in its separate collection and recycling.

The document presented here is the **Executive Summary of the Study**, which sets out the main conclusions and provides a reflection on the role of consumers and users in the success of the system and in the transition towards more sustainable and circular consumption models.



3. OBJECTIVES



General objective: To analyse the level of awareness, the overall attitude, and the main preferences and concerns of the consumer population regarding the possible implementation of a DRS in Spain.

1. To measure the level of spontaneous and prompted awareness of this type of system.
2. To identify the general perception of the model.
3. To assess the initial degree of willingness to participate in a system of these characteristics.
4. To identify the main barriers, constraints, doubts and objections that arise spontaneously.
5. To understand areas for improvement and opportunities to increase public engagement.
6. To identify citizens' preferences regarding certain operational elements of the system.
7. To analyse possible differences according to gender, age group and mail area of residence.



4. METHODOLOGY



UNIVERSE

Population aged 18 and over, distributed proportionally by gender, age group, and autonomous community of residence.

SAMPLING ERROR

For a 95% confidence level and under standard sampling conditions of $p=q=50\%$, the theoretical margin of error is 2.45%.

SAMPLE SIZE

1,600 surveys.

TYPE OF INTERVIEW

Computer-assisted telephone survey.

FIELDWORK PERIOD

From 9 to 26 May 2026.

Sample distribution

	Woman				Man				Total			
	18 - 29	30 - 49	50 - 64	65 +	18 - 29	30 - 49	50 - 64	65 +	18 - 29	30 - 49	50 - 64	65 +
Andalucía	11	50	29	27	33	58	35	37	44	108	64	64
Aragón	2	7	10	7	1	6	3	8	3	13	13	15
Asturias	1	4	10	6	0	4	6	4	1	8	16	10
Islas Baleares	3	12	5	6	2	3	2	7	5	15	7	13
Cantabria	1	3	3	2	1	3	4	3	2	6	7	5
Canarias	5	13	12	12	3	12	13	6	8	25	25	18
Castilla y León	5	12	10	11	2	14	11	16	7	26	21	27
Castilla - La Mancha	8	14	12	3	2	12	8	10	10	26	20	13
Cataluña	13	49	32	31	8	42	42	44	21	91	74	75
C.Valenciana	12	44	24	14	7	36	19	19	19	80	43	33
Extremadura	2	5	8	2	1	4	10	3	3	9	18	5
Galicia	8	17	13	12	5	18	13	6	13	35	26	18
C. de Madrid	19	25	34	19	11	39	46	37	30	64	80	56
Murcia	3	10	8	6	1	11	6	5	4	21	14	11
Navarra	0	5	3	3	2	4	3	2	2	9	6	5
País Vasco	3	4	11	11	3	13	12	17	6	17	23	28
La Rioja	0	2	1	1	1	3	2	1	1	5	3	2
Ceuta	0	0	1	0	0	0	1	0	0	0	2	0
Melilla	0	1	0	1	0	0	1	0	0	1	1	1
BASE	96	277	226	174	83	282	237	225	179	559	463	399

The data have been weighted to maintain the proportionality of the sample with respect to the defined universe, in accordance with population data from the 2026 municipal register published by the INE. For the analysis of results, data are shown at the autonomous community level, except in cases where the sample size is fewer than fifty. One exception is the Balearic Islands, which has a sample of 40; therefore, its results should be interpreted with greater caution. For the remaining regions with low sample sizes, results have been aggregated with neighbouring communities (e.g., Asturias and Cantabria; or Aragón, Navarra, and La Rioja).



5. RESULTS



5.1. Domestic culture of waste separation

The management of plastic, metal, and carton beverage packaging waste takes precedence in Spanish households. The most common bin in homes is the one used to collect and separate this type of waste.

86% of people separate this type of packaging waste at home.

Space in households: currently, on average, each household has 3.5 different bins or spaces for waste separation.

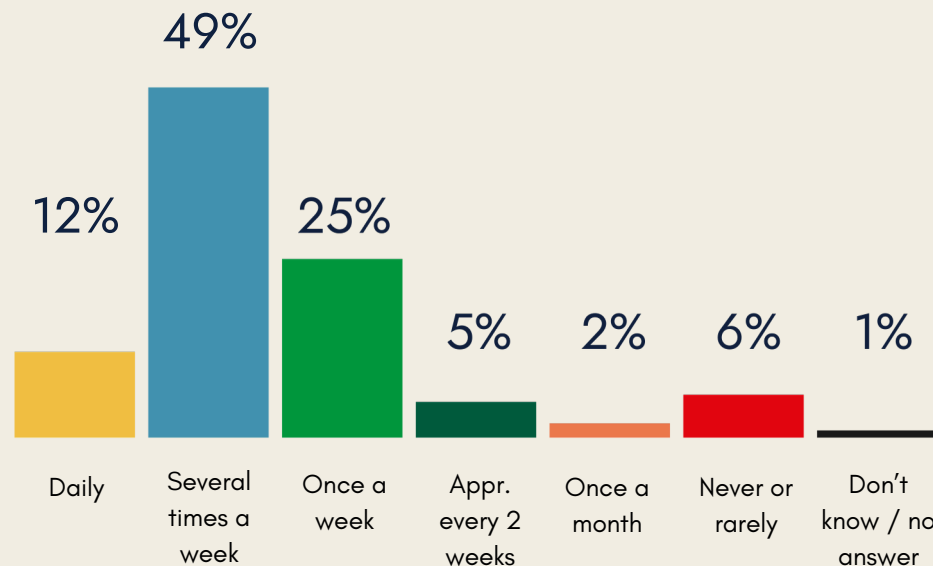
Considering the available space at home and the number of beverage bottles or cans under 3 litres consumed: for most people, storing uncrushed packaging does not pose a space problem.

Only 12% state that they would not be able to store them.

Only 6% of respondents admit that they never dispose of packaging in the appropriate bin.

Currently, it is most common for packaging to be taken to the bin at least once a week (87%).

Frequency of disposal of plastic packaging or cans in the yellow bin (excluding cartons).





5. RESULTS



5.2. Awareness of the DRS

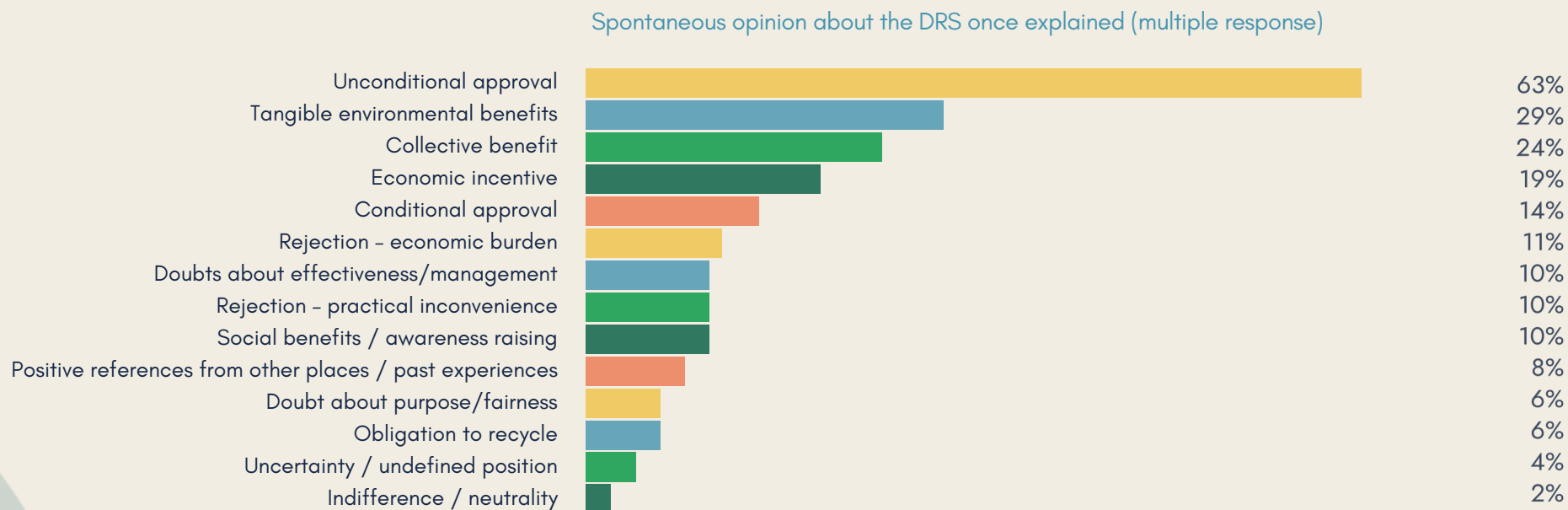
The DRS is still not widely recognisable across society, although most people have heard of it. Awareness of the system declines at both ends of the age pyramid. 17% of people say they have used it.

First reactions to the DRS. Once the DRS has been explained, most opinions collected are positive and are based on the perception of environmental and collective benefits.

More people view the refund as an incentive than see it as a burden.

Based on the responses given, the level of approval of the system can be estimated at 71%, while rejection stands at 16%.

The level of rejection increases significantly among men, and also rises among older age groups. Rejection is justified equally by economic reasons and logistical inconvenience.





5. RESULTS

5.3. Drivers for promoting the DRS

The motivations for joining the DRS are primarily ecological motivation, cited as the main reason for using the system, followed closely by economic motivation, which is almost equally important.

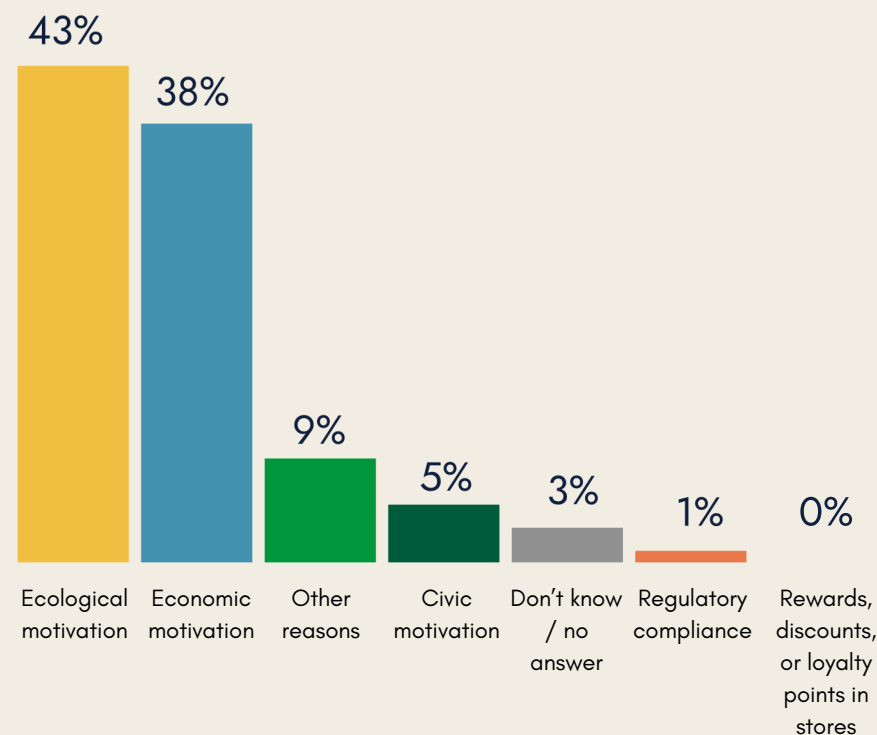
Ecological and economic motivations are the main drivers of the DRS.

The idea is confirmed that the financial incentive can help improve separate collection rates. Therefore, the two main drivers for promoting this system are environmental and economic ones.

Ecology and economy go hand in hand.

Age introduces relevant nuances in the motivation towards the future system. Thus, economic motivation loses relative importance among older age groups, while ecological motivation becomes more prominent.

Motivation to return empty containers within the system





5. RESULTS



5.4. Operational design of the system

Convenience is a critical factor for the success of the DRS. Consumers associate the **return process with the moment of purchase**.

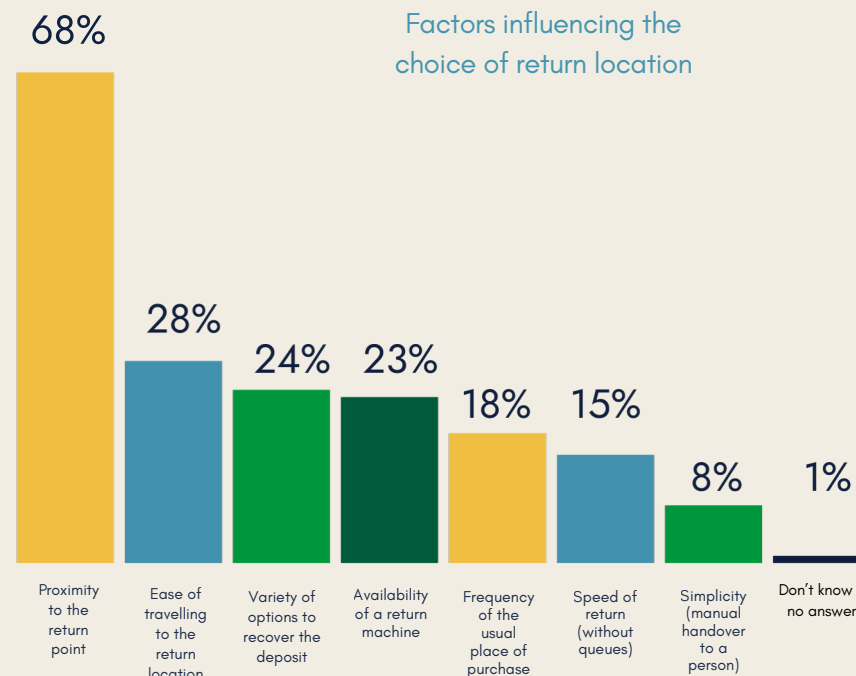
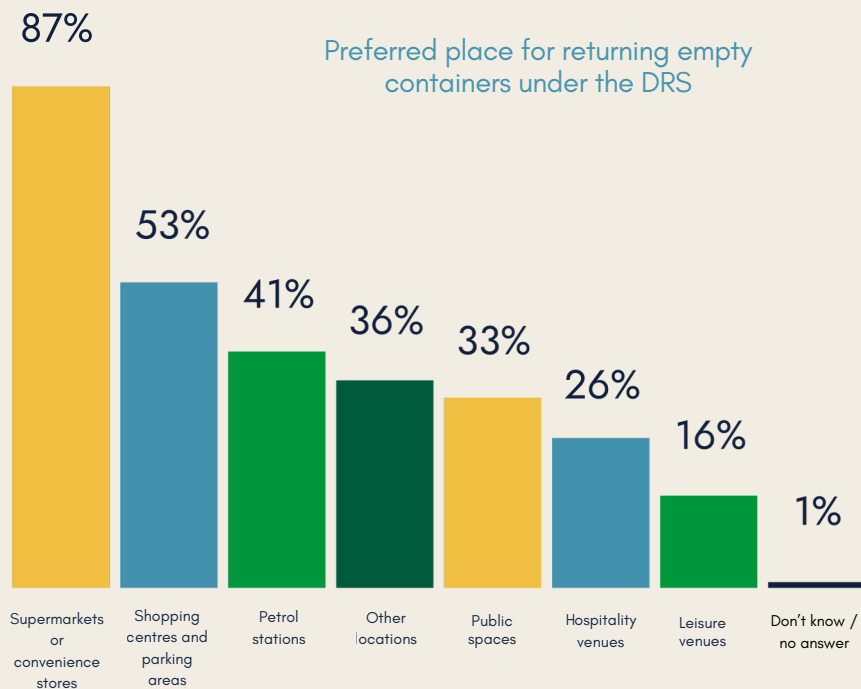
The return should take place where the purchase occurs.

Supermarkets or local convenience stores are the preferred channel across all groups for returning packaging subject to the DRS.

Shopping centres are more popular among men and younger people.

It is precisely younger people who call for a greater diversity of solutions.

Proximity is the main criterion for choosing the return location.





5. RESULTS

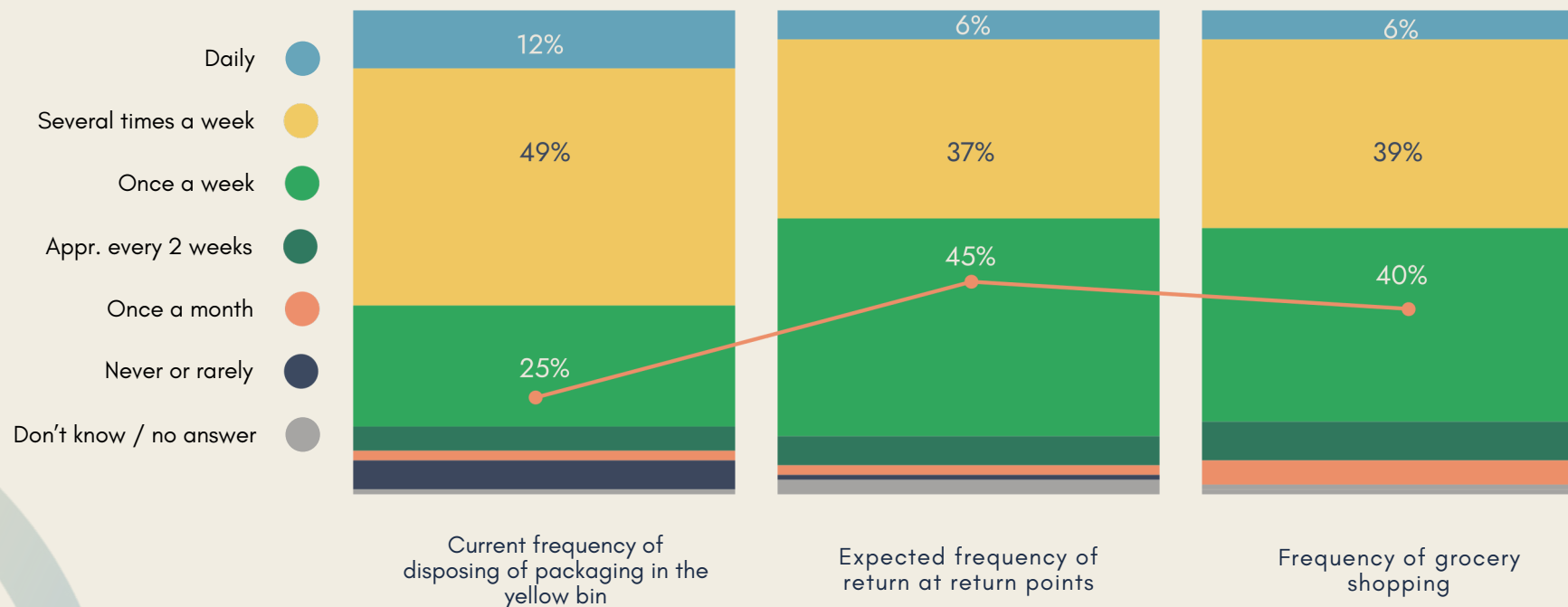


The system should be integrated into current everyday shopping routines.

Consistent with the when and where, the future return frequency would be more closely linked to shopping frequency than to the current frequency of disposal in the yellow bin.

83% of people consider it quite or fully likely that they would take advantage of the shopping moment to return packaging subject to the DRS.

Current and expected frequencies of returning packaging to the yellow bin compared with the frequency of grocery shopping.





5. RESULTS



Deposit refund.

Among the alternatives for recovering the deposit, consumers prefer those that provide the most immediate liquidity or availability.

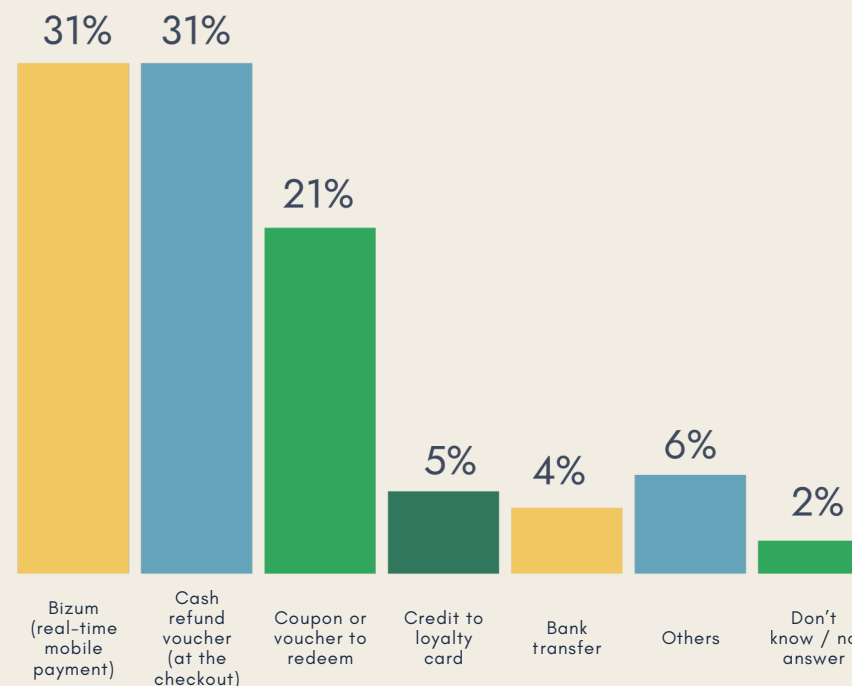
The recovery of the deposit should be simple and visible. The more visible the recovery is, the easier it will be to understand how the DRS works.

Immediate refund of the deposit builds trust.

Age and gender introduce significant differences: interest in Bizum increases among younger groups and among men.

Preference for cash refund at the checkout is higher among older audiences and among women.

Preferences for deposit refund methods





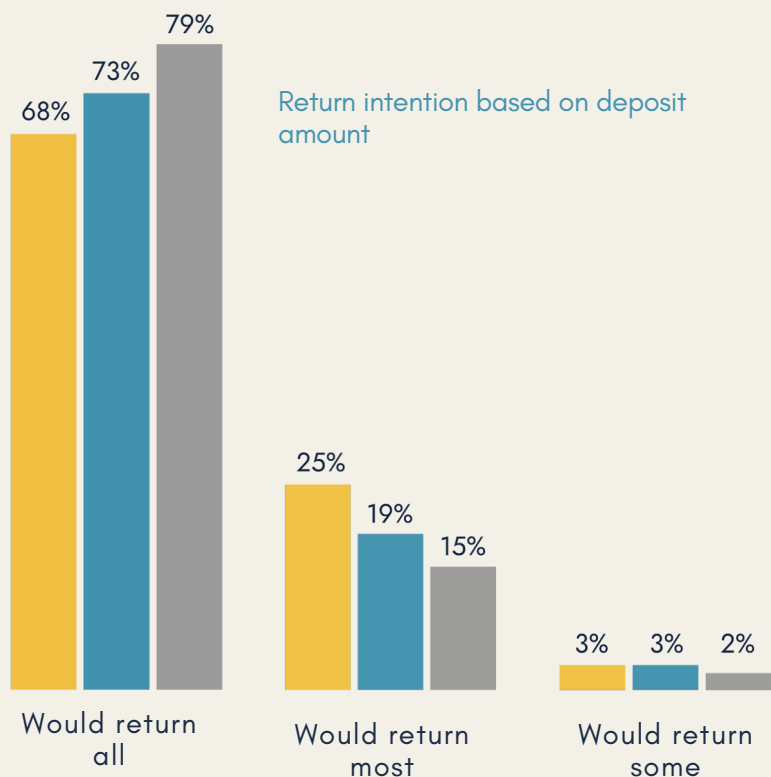
5. RESULTS



The impact of the amount on participation.

The economic factor is a clear incentive for promoting the return of packaging. This is confirmed when analysing sensitivity to the deposit amount: every 5 cents increase in the deposit also raises by 8% the likelihood of returning all packaging.

The economic design influences behavior.

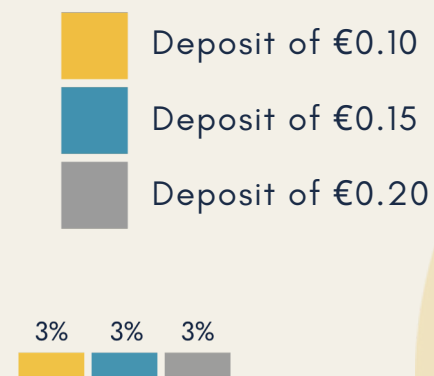


The sociodemographic analysis leads to the following insights:

- Women show greater commitment to returning packaging.
- Commitment increases significantly with age.
- Only when the deposit reaches €0.20 per container does the most reluctant group (young people) begin to approach the levels of other groups.

The percentage of people who would return all packaging exceeds 60% in all autonomous communities only when the deposit amount is €0.15 or higher.

The amount of the deposit directly influences the return rate.





5. RESULTS



The scope of the DRS system.

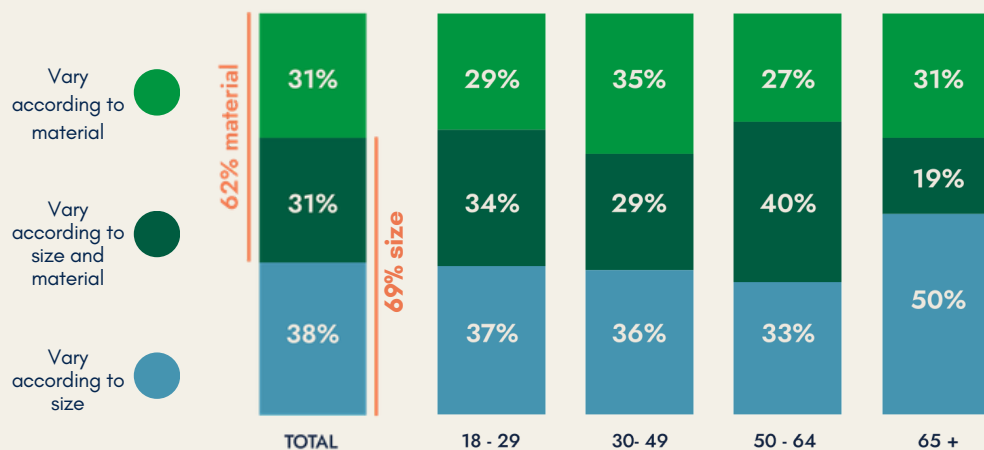
There is greater support for a deposit that varies according to size or material, although 20% still do not have a formed opinion. This is more pronounced among younger people. Lack of opinion or preference for simplicity increases among older people.

People support the idea of a variable deposit depending on size or material.

Among those who believe the deposit amount should vary (50% of the sample), opinions are fragmented, although most favour increasing the deposit based on size (69% of those who think it should vary), while those who support varying the amount according to material also represent a significant group (62%).

It is advisable to design the system carefully to avoid potential distortions.

Opinion on the criteria for setting the deposit amount (by age)



Base: people who believe it should vary (793 surveys)

Opinion on the materials to be included in the future DRS.

Although 27% of people are indifferent as to whether the system includes carton beverage packaging or only plastic bottles and cans (<3L), 45% of consumers prefer the system to apply to all types of packaging. This view is more widespread among younger people.

Preference for a universal model covering all types of packaging.



5. RESULTS



5.5. Changes in consumer behavior

Changes in the shopping basket.

Once again, the economic factor emerges: 26% of consumers would change their purchasing habits by opting for products with packaging subject to a lower deposit. Stability in consumption habits prevails among most consumers, although the design of the system may lead to changes in demand, shifting it towards packaging materials without a deposit, such as glass.

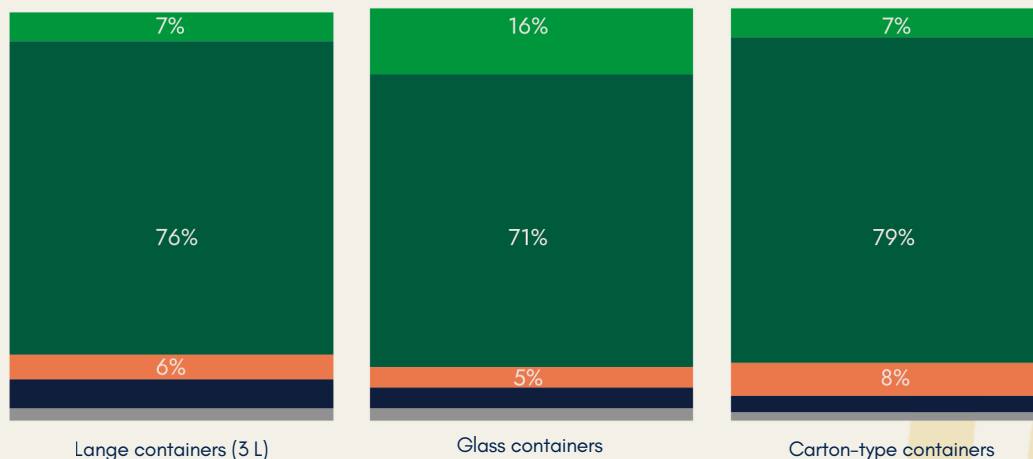
Changes in demand across materials and formats. Analysis of the expected impact on the system according to packaging choices across three beverages categories:

- **Water:** 20% of bottled water consumers (12% of the total population) would choose larger formats exempt from the deposit.
- **Beer:** 30% of beer consumers (18% of the total population) would switch to formats exempt from the deposit.
- **Soft drinks:** There is greater loyalty to the current format. Only 13% of soft drink consumers would switch to beverages in non-deposit packaging (representing just 9% of the total population). An additional 8% of consumers would consider reducing their consumption.

The system design can influence purchasing decisions.

Expected impact of the system on purchase sizes and formats

- Would buy more ●
- Would buy the same ●
- Would buy less ●
- Would not buy ●
- Don't know / no answer ●



Exemptions from the DRS could lead to a significant shift in beverage sales towards glass formats across all regions.



5. RESULTS



Changes in separate collection.

The recycling culture is sufficiently established to coexist with the system. Thus, with the introduction of the new system, only 2% of people would stop separating other packaging not subject to the DRS.

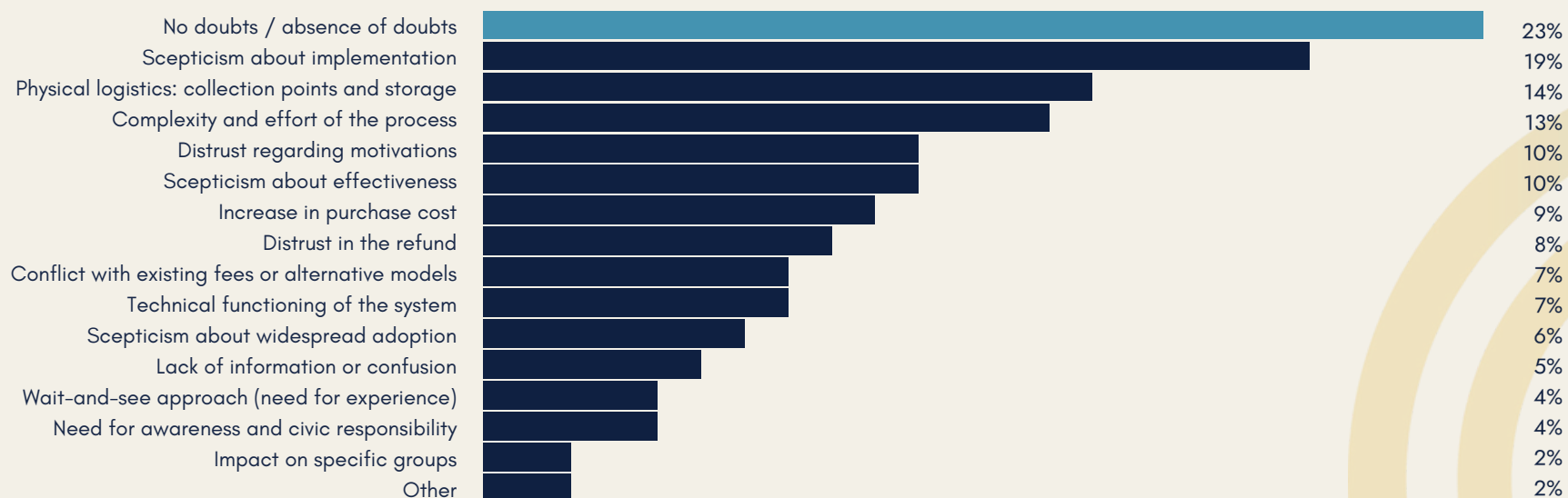
The DRS does not weaken existing recycling; rather, it complements it.

Those who currently have the habit of separating this waste will see it reinforced by the future DRS.

The challenge is to address uncertainties about the future system, as 77% of people have some kind of doubt regarding the DRS. The most frequent concerns relate to its implementation and the overall logistics of the system.

The main challenge is to address doubts linked to implementation, operation, and logistics. Communication will be as necessary and important an element as the infrastructure of the future DRS.

Possible doubts expressed about the DRS at the end of the survey





6. CONCLUSIONS



6.1. The introduction of the Deposit Return System (DRS) is being considered in a context with a consolidated recycling culture, although still insufficient.

The starting point is high receptiveness and operational feasibility in Spanish households.

The implementation of the future Deposit Return System (DRS) begins from a favourable situation. Household waste separation is widely established in Spanish homes, and there is a domestic infrastructure that, in general terms, allows the new system to be integrated without creating significant storage or management difficulties.

Therefore, the introduction of the Deposit Return System (DRS) is set against a backdrop of a consolidated culture of separate collection and recycling, although still insufficient.



Once its functioning is understood, the DRS receives a predominantly positive assessment. Acceptance of the system is mainly based on the environmental benefits that consumers attribute to it, while reservations are concentrated around potential operational inconveniences and the perceived economic impact.



6. CONCLUSIONS



6.2. Sustainability and price sensitivity as drivers of participation

The drivers for promoting the DRS will be ecological and economic motivation.

Participation in the future DRS will be determined by the convergence of two complementary factors: environmental awareness and the economic incentive. Both act as motivating elements for the return of packaging waste and mutually reinforce their ability to mobilise participation.

The relative importance of each varies according to population profile. While environmental motivations are more relevant among older people, the economic incentive is particularly decisive among younger groups.

The balance between sustainability and price sensitivity.

The results also show that the economic design of the system will directly influence participation levels; therefore, the setting of the deposit amount must seek a balance that encourages the return of packaging without generating negative perceptions or acceptance barriers.



6. CONCLUSIONS



6.3. Convenience and simplicity: key to success

The operational design based on proximity and convenience as critical factors of the system.

Acceptance of the DRS will not depend solely on its environmental objectives, but also on how easily it can be integrated into everyday shopping and consumption routines.

Consumers naturally link packaging return to the act of shopping; therefore, the proximity of return points and their integration into usual retail outlets are decisive factors in encouraging participation.

Immediate and liquid refund mechanisms are prioritised in the deposit reimbursement process.

Likewise, the recovery of the deposit should be simple, immediate, and easily understandable. Speed and immediacy of reimbursement, as well as the perception of liquidity, are key elements in building trust and strengthening system uptake.

Preference for a universal system model.

The results also point to a preference for universal, broad, and inclusive models that reduce exceptions and make the system easier for citizens to understand.



6. CONCLUSIONS



6.4. Changes in the shopping basket.

Potential changes in the shopping basket.

Although most consumers would maintain their usual consumption patterns, the study identifies possible changes in certain market segments linked to the deposit amount and the final scope of the system.

Therefore, the price/deposit variable will alter purchasing behaviour in the short and medium term.

Monitoring possible changes in beverage demand by material or format.

Demand elasticity in response to the DRS will vary depending on the product category. The existence of excluded materials or container sizes could encourage shifts in demand towards alternatives not subject to the deposit, particularly in certain beverage categories that are more sensitive to price or format.



Design the system carefully to avoid potential distortions.

For this reason, the final design of the DRS must carefully assess its possible effects on purchasing habits in order to avoid undesired distortions and ensure that environmental objectives are achieved without generating counterproductive incentives.



6. CONCLUSIONS



6.5. Transformation in household separate collection dynamics

The DRS does not weaken existing recycling; rather, it will strengthen it under the future system.

The results show no indications that the implementation of the DRS could weaken current waste separation habits. On the contrary, the system is perceived as a complementary mechanism capable of reinforcing already established behaviours among the population.

The strong willingness to continue separating waste not covered by the system confirms that the DRS can coexist with current separate collection models, helping to improve the recovery of certain types of packaging without replacing existing recycling practices.





6. CONCLUSIONS



6.6. Social acceptance, with operational doubts still to be addressed

The main challenge is not acceptance of the system, but its understanding.

The main conclusion of the study is that social acceptance of the future DRS appears to be more advanced than the level of awareness of the system. There is a favourable disposition towards the system, but numerous doubts remain about its practical functioning, its implications, and the changes it will introduce in everyday shopping and waste management experiences.

The challenge will be to address doubts regarding the implementation and logistics of the system.

Consequently, the success of the model will depend both on the infrastructure and logistics for the return

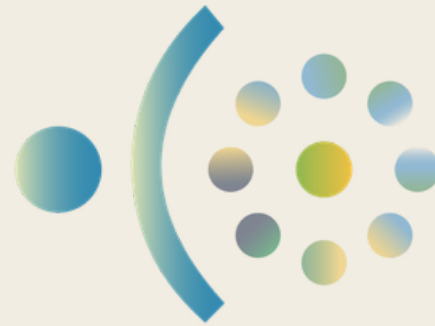


system for packaging waste and on the ability to communicate in a clear, simple, and accessible way to consumers and users.

Communication must become a strategic element of implementation, reducing uncertainty and facilitating understanding of a system intended to play a key role in the transition towards a circular economy.

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