



Circular Economy National Survey

Quantitative research

October 2021

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J.212942



RESEARCH
& INSIGHT



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Introduction

- The purpose of today is to review the findings from Phase 1 of our Circular Economy Study.
- This involved a quantitative review of awareness & understanding of the circular economy, via a national survey.

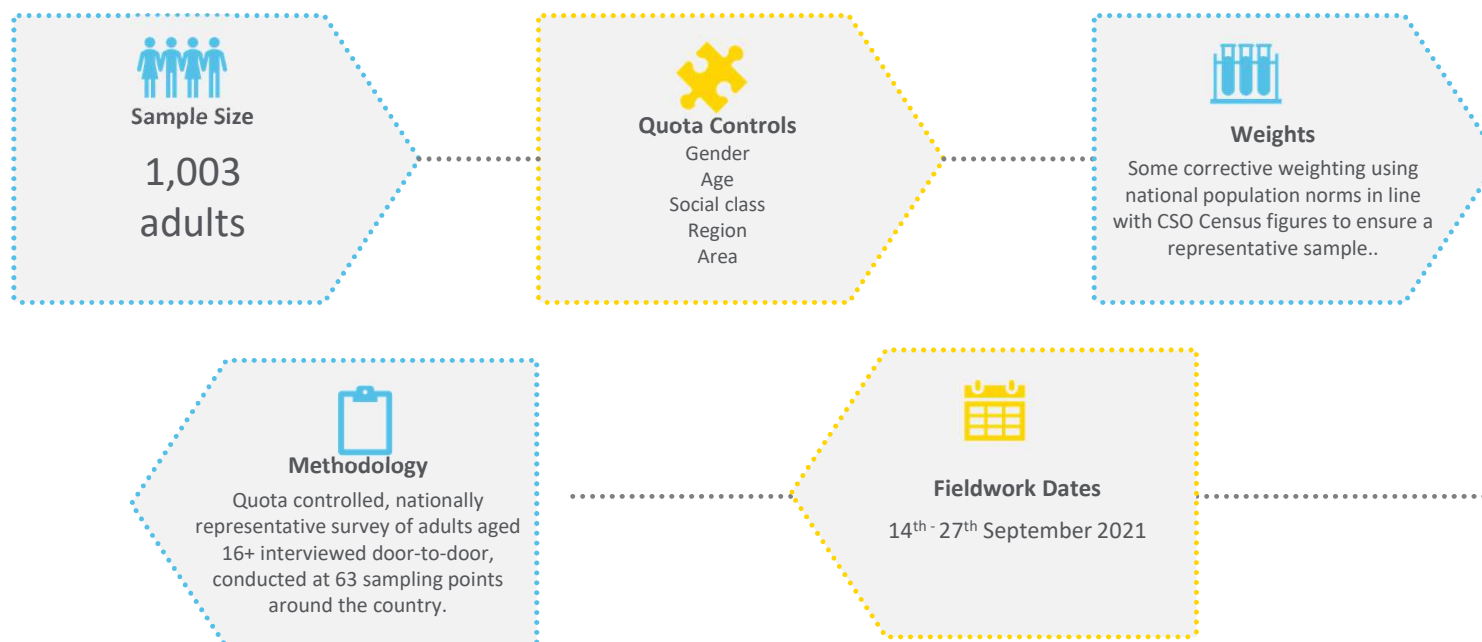
Core Objective

- To gauge level of awareness and understanding of the circular economy among Irish adults.
- To assess the various segments in Irish society in terms of level of engagement with the circular economy.
- To help identify the best next steps to take in terms of recruitment and qualitative forum topics for Phase 2.

Methodology: National Survey



A syndicated nationally representative survey conducted using a face-to-face methodology.

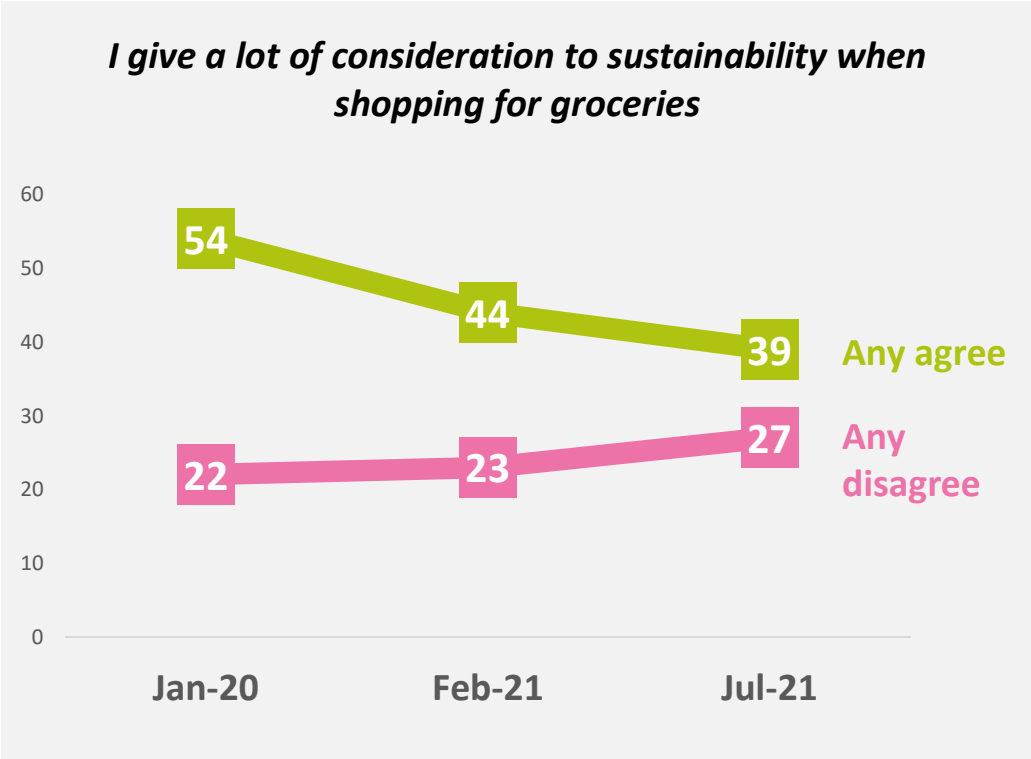


This is of course the first phase of this study designed to explore levels of awareness, interest and size of various segments at a population level.



Cultural Context

...fewer Irish adults are giving consideration to sustainability when shopping for groceries in 2021



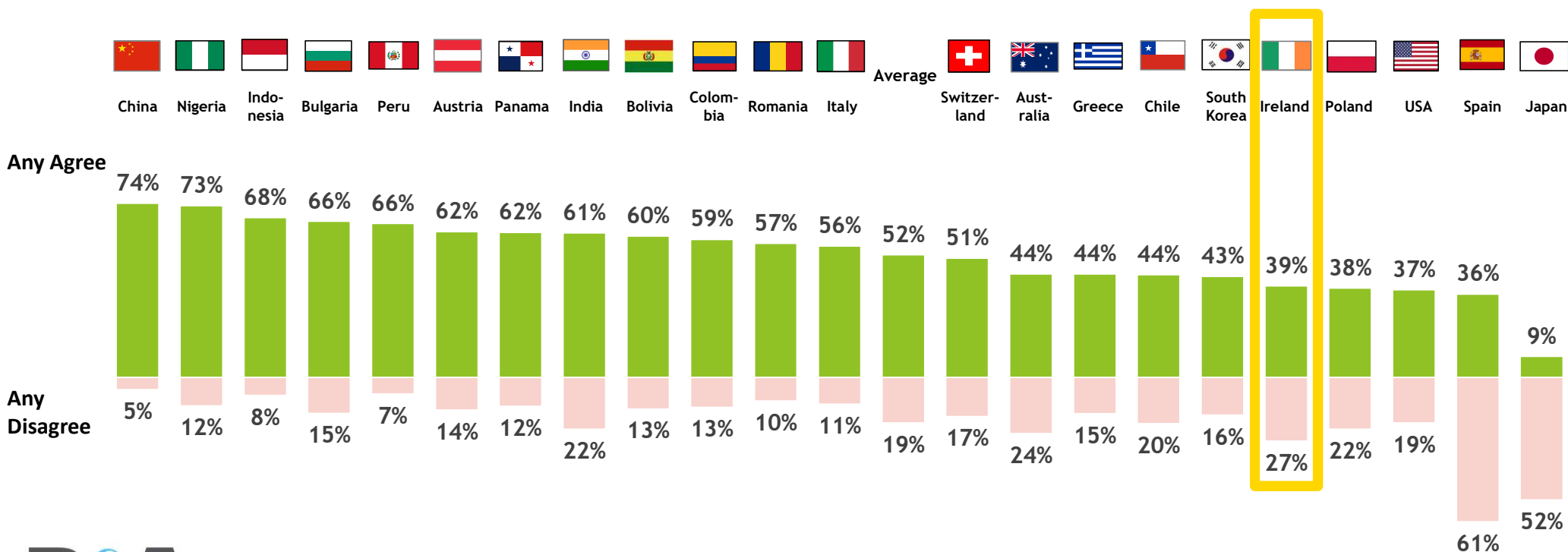
Base: All adults: 1,029/3,839,000

Q.6 We'd now like you to think about reasons for buying. For each of the statements below, please tell us how strongly or otherwise you agree or disagree with each of them.



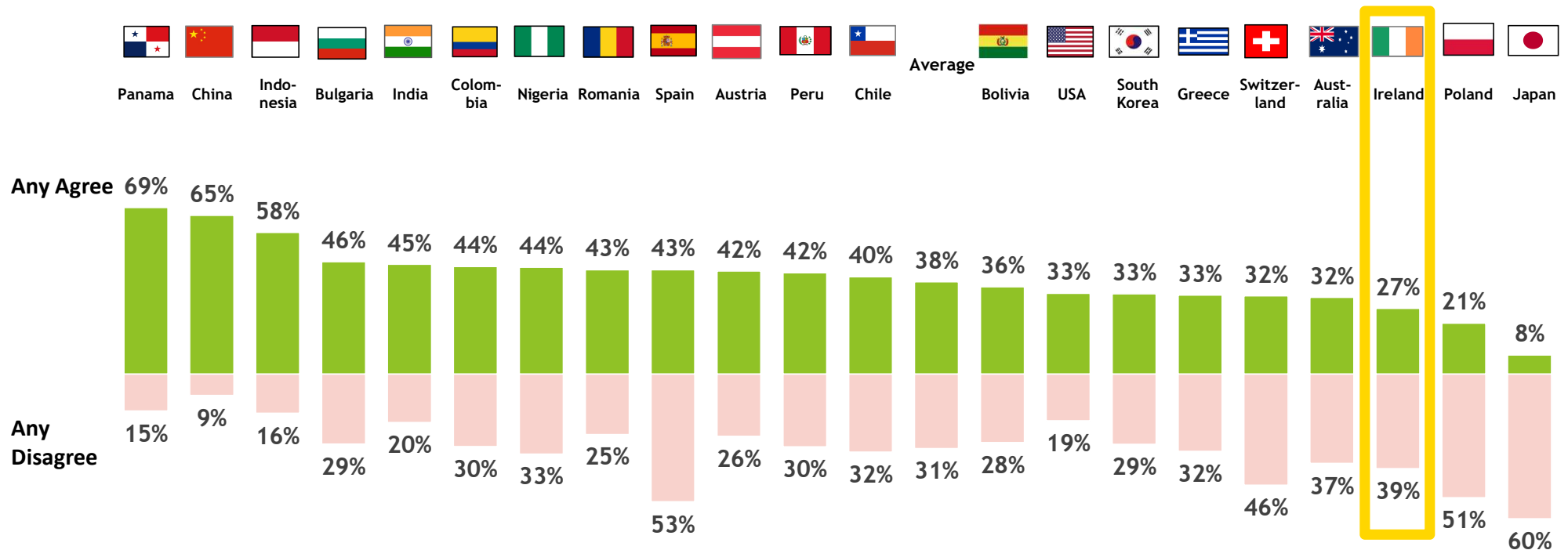
In fact, Irish adults are much less likely to give consideration to sustainability when grocery shopping than adults in most other countries surveyed

I give a lot of consideration to sustainability when shopping for groceries



We're also far less likely than other countries to always use a "keep cup" when getting coffee

I always use a "keep cup" when getting coffee rather than use a take-away cup with a plastic lid

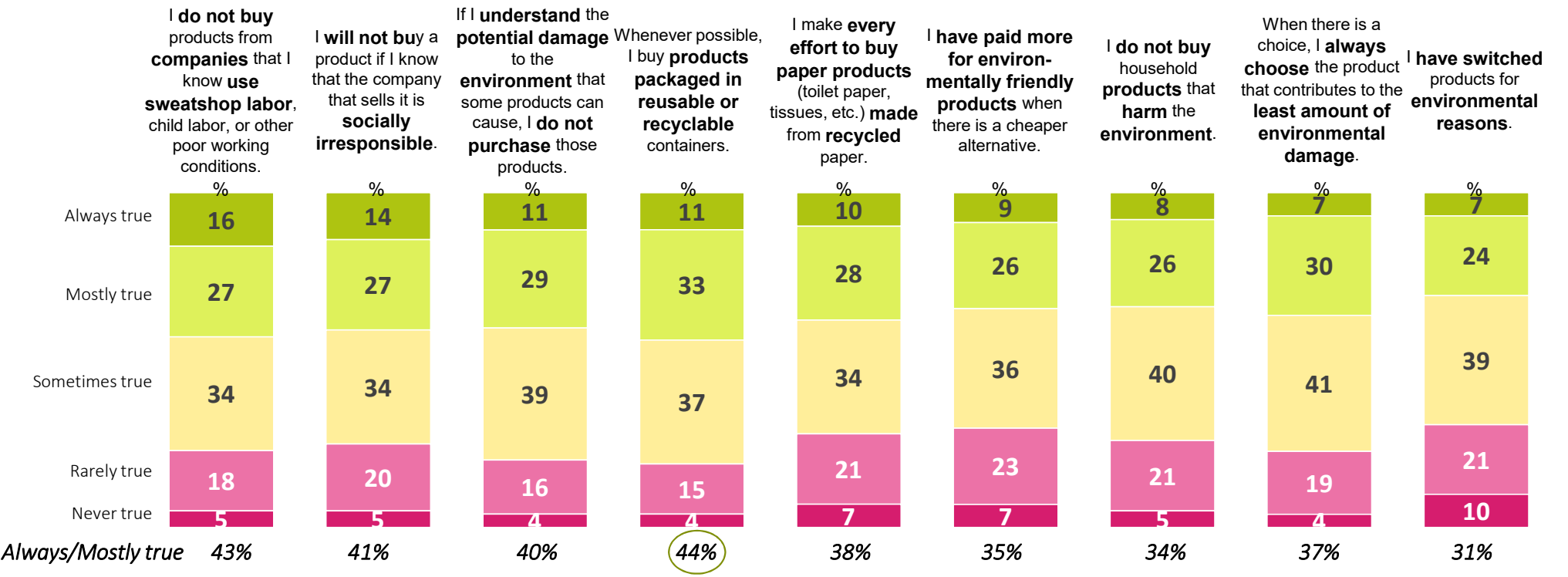




Ethically Minded Consumer

Ethically Minded Consumer Behaviour*

Base: All adults 16+ - 1,003/3,839,000

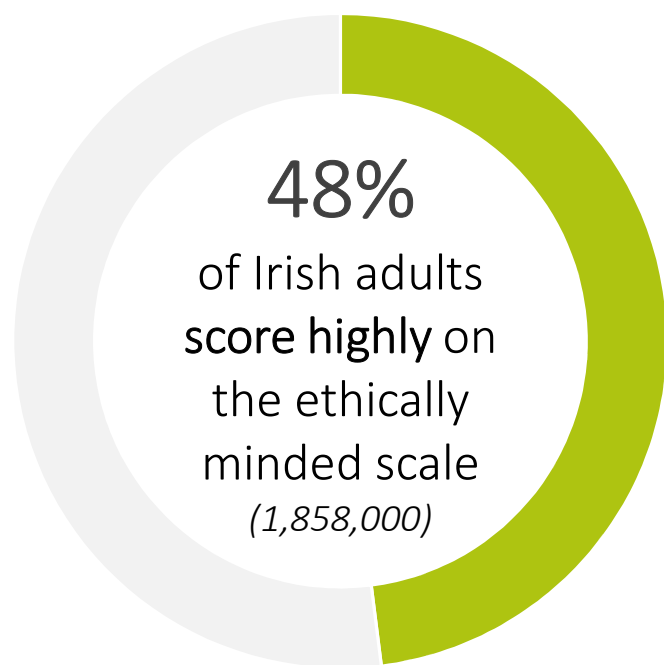


Incidence of switching products for environmental reasons is the lowest overall, whereas people are most inclined to suggest that they always/mostly purchase products that are packaged in reusable or recyclable containers. That said, there does seem to be a disconnect, with more focus on packaging than the product itself: only 38% always/ mostly buy recycled paper products, while 34% always/mostly do not buy products that harm the environment.

*Source: Sudbury-Riley L, Kohlbacher F (2016) Ethically minded consumer behavior: scale review, development, and validation: **the scale conceptualises ethically minded consumer behavior as a variety of consumption choices pertaining to environmental issues, sustainability and corporate social responsibility.** Developed and extensively tested among consumers in the UK, Germany, Hungary, and Japan, the scale demonstrates reliability, validity, and metric measurement invariance across these diverse nations.



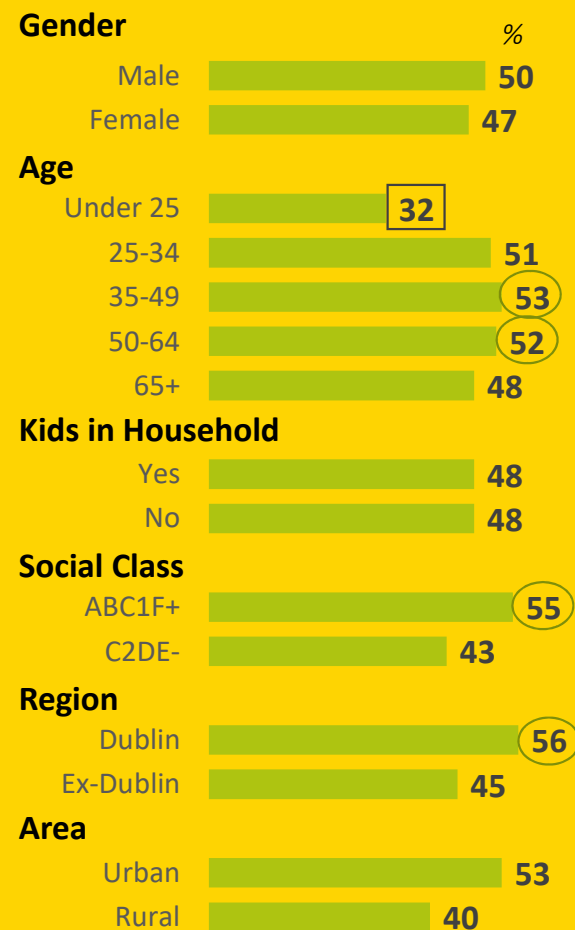
Just under half of adults are 'ethically minded'



While weakest among the under 25s, we see higher proportions among the 35-49 and 50-64 age groups, among the middle class and among Dubliners.

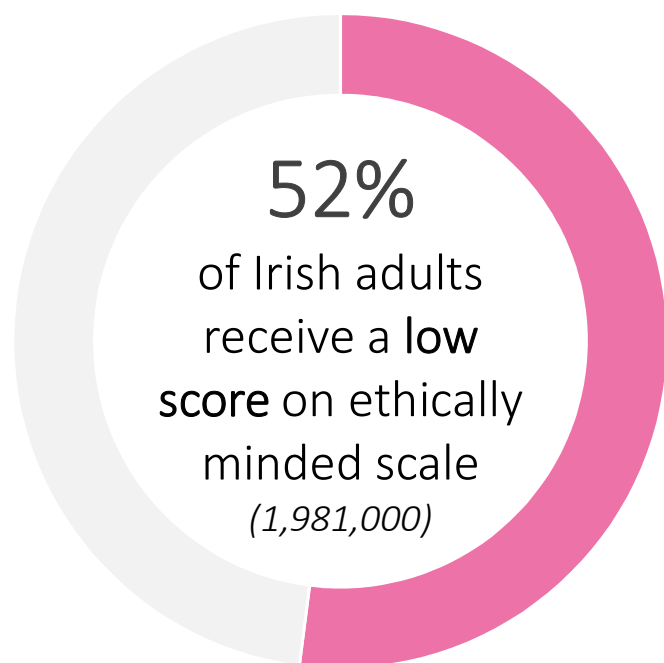
Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.

More Ethically Minded



Base: All adults aged – 1,003/3,839,000

Whereas just over half are less ethically minded



Two thirds (68%) of under 25s considered less ethically minded, while incidence higher among the working class community and outside Dublin.

Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.



Less Ethically Minded

Gender

	%
Male	50
Female	53

Age

Under 25	68
25-34	49
35-49	47
50-64	48
65+	52

Kids in Household

Yes	52
No	52

Social Class

ABC1F+	45
C2DE-	57

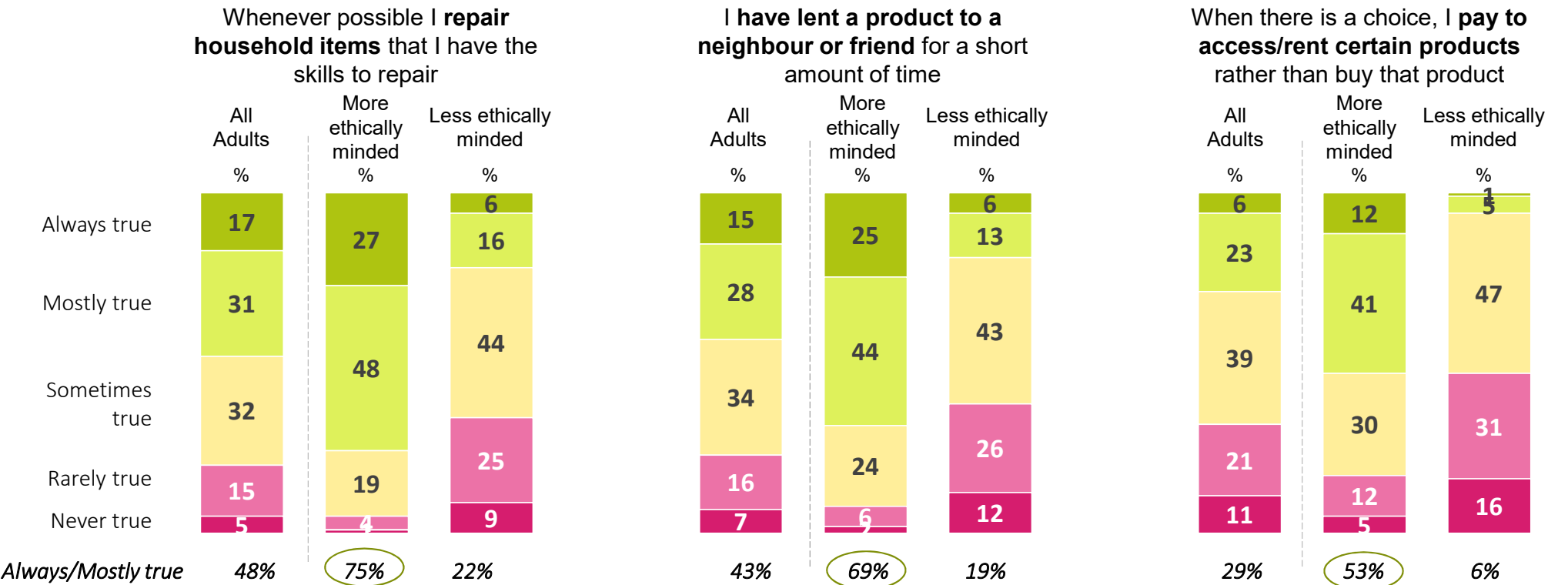
Region

Dublin	44
Ex Dublin	56
Urban	47
Rural	60

Base: All adults aged – 1,003/3,839,000

Ethically Minded Consumer Behaviour: Circular Economy

Base: All adults 16+ - 1,003/3,839,000



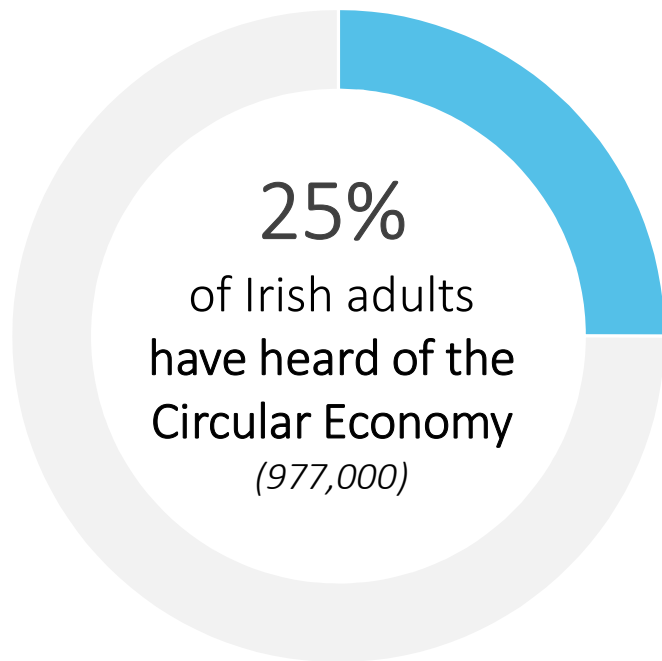
Those who are more ethically minded are much more inclined to engage with the circular economy than others: 75% repair items where possible, more than two thirds loan products to friends/neighbours, while more than half pay to access/rent rather than buy products. Conversely, just 6% of those less ethically minded pay to rent rather than buy.





Circular Economy: Understanding

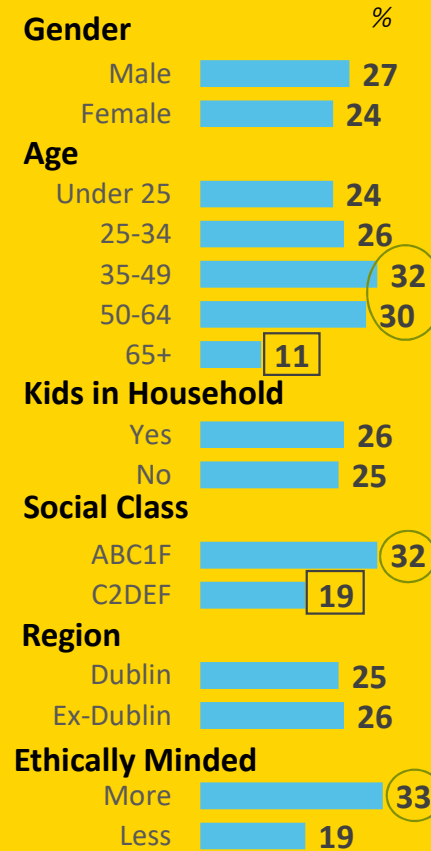
Name Recognition: 1 in 4 have heard of the 'Circular Economy'



Greater name recognition among the middle class and the more ethically minded.



Heard of 'Circular Economy'

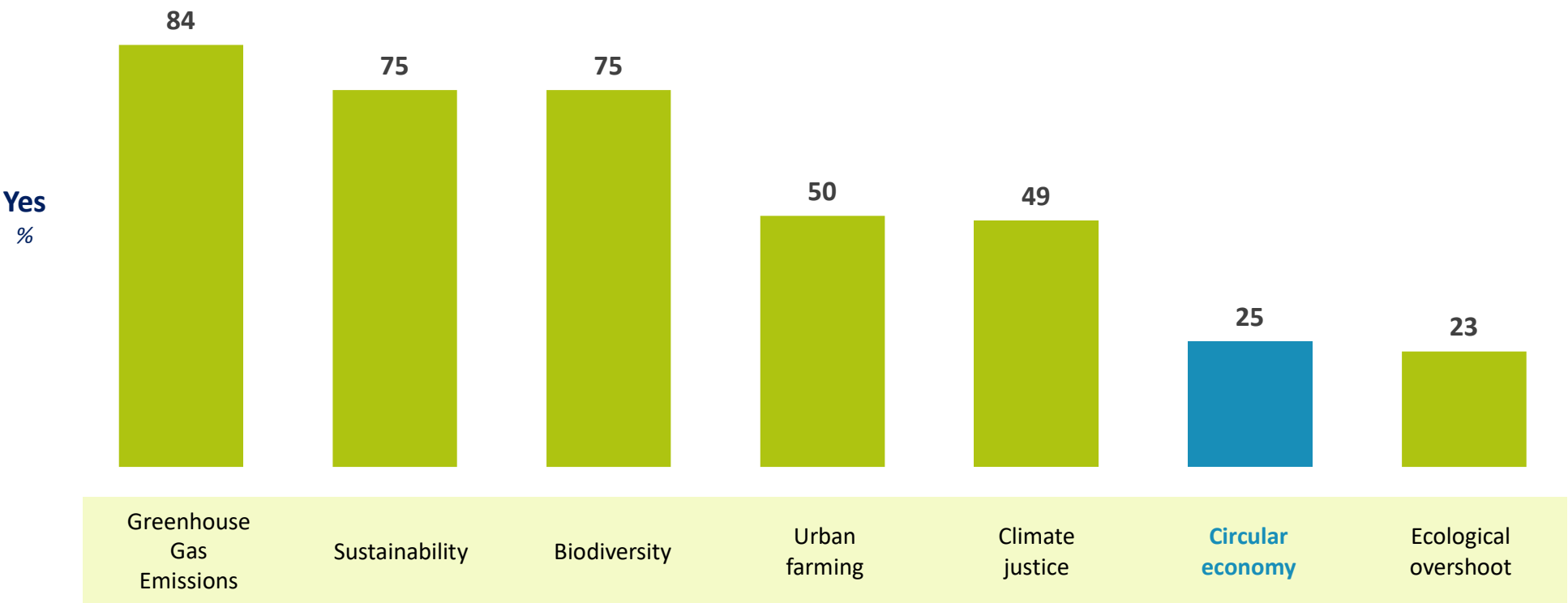


Base: All adults aged – 1,003/3,839,000

Environmental terms: *Name recognition*



Base: All Adults aged 16+: 1,003/ 3,839,000



Environmental terms: Name recognition

Base: All adults 16+ - 1,003/3,839,000



	All Adults	Gender		Kids in Household		Age					Social Class			Region			
		Male	Female	Yes	No	-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Dublin	Leinster	Munster	Conn/Ulster
	1,003	480	523	337	666	111	157	263	260	212	480	478	45	278	276	273	176
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Greenhouse gas emissions	84	88	80	84	83	87	79	86	86	78	89	79	84	83	88	79	87
Sustainability	75	81	70	78	74	82	73	83	74	62	83	69	74	76	81	76	64
Biodiversity	75	80	70	75	75	78	70	82	78	61	84	67	73	73	82	74	70
Urban farming	50	56	45	48	52	53	43	51	58	44	59	43	50	61	49	44	44
Climate justice	49	54	43	48	49	51	49	52	49	40	58	42	38	52	53	43	44
Circular economy	25	27	24	26	25	24	26	32	30	11	32	19	32	25	19	30	29
Ecological overshoot	23	27	19	24	22	23	22	29	22	16	31	17	19	28	18	24	20
Don't know any	10	6	14	9	11	8	14	7	9	14	5	14	10	11	9	12	7

In most cases, name recognition is stronger among men and ABC1s



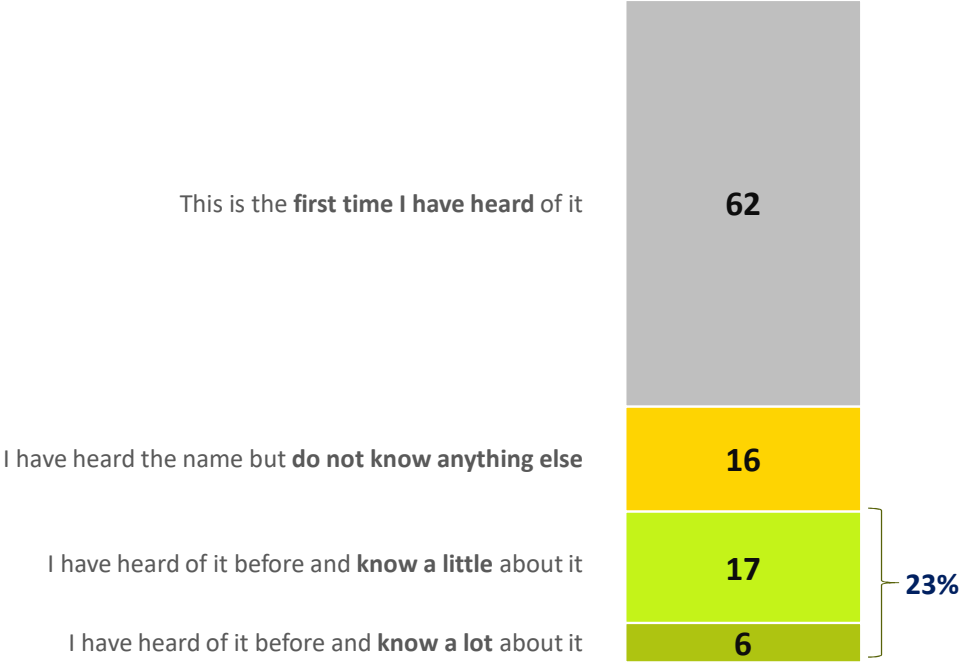
Circular Economy: *Public Familiarity*

Base: All Adults aged 16+: 1,003/ 3,839,000



Total
%

A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.



23% of Irish adults feel they know something about the Circular Economy;
again higher among ABC1s (33%), in Dublin (32%) and among the High Ethnically Minded (30%)

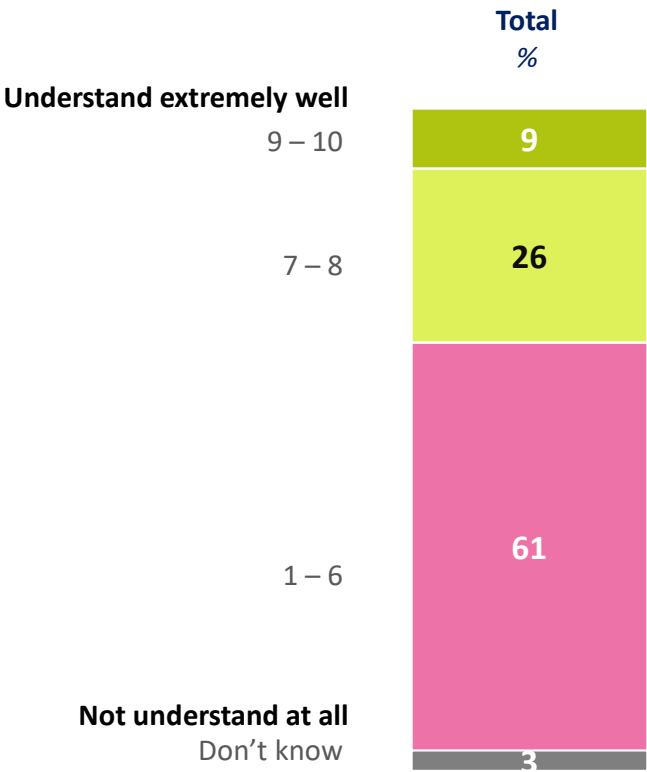


Circular Economy: Prompted *Understanding*

Base: All Adults aged 16+: 1,003/ 3,839,000



A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.



There is an issue with our summary description of the Circular Economy: people rarely understand it; 35% of adults give an 'understanding score of 7+ after reading the summary description (rises to 61% of those with prior knowledge of the Circular Economy).

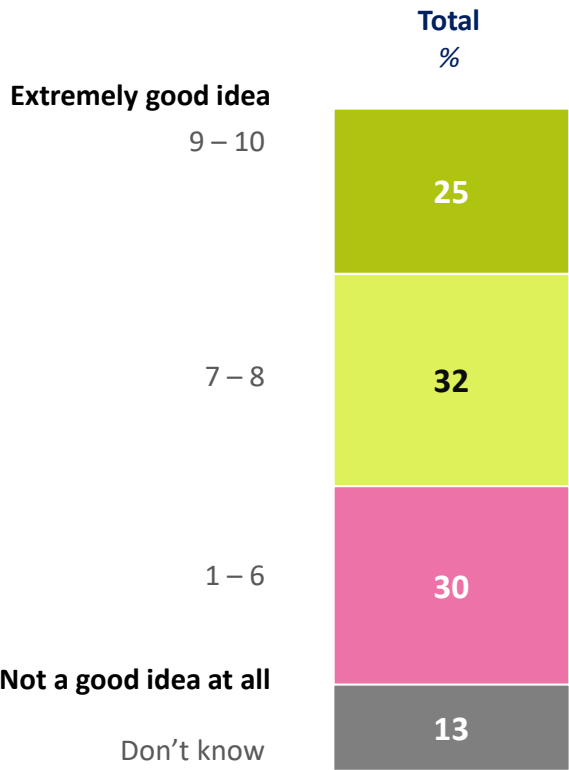


Circular Economy: Overall Support

- Moving to the Circular Economy is a good idea

Base: All Adults aged 16+: 1,003/ 3,839,000

A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.



Our tentative understanding appears to inhibit support: 25% consider the Circular Economy an extremely good idea. (30% ABC1; 32% high ethically minded).

Circular Economy: Knowledge Matrix - Familiarity & Interest

Circular Economy - *Detailed familiarity & Interest*



Requires **improved waste prevention and reduction**, the reduced use of hazardous substances, and restoring natural systems

Reimagines business models to encourage sustainable ways of managing resources, such as **renting and leasing**, shared ownership and buy-back

Contributes to developing a **sustainable, low carbon, resource efficient and competitive economy**

Extends the **lifetime of products** by designing products and packaging to facilitate easy re-use, sharing, renting and leasing, repair and recycling

Reduces/prevents **packaging waste**

Requires new **changed patterns of consumption** such as renting, sharing, repair, reusing, retrofitting and repurposing

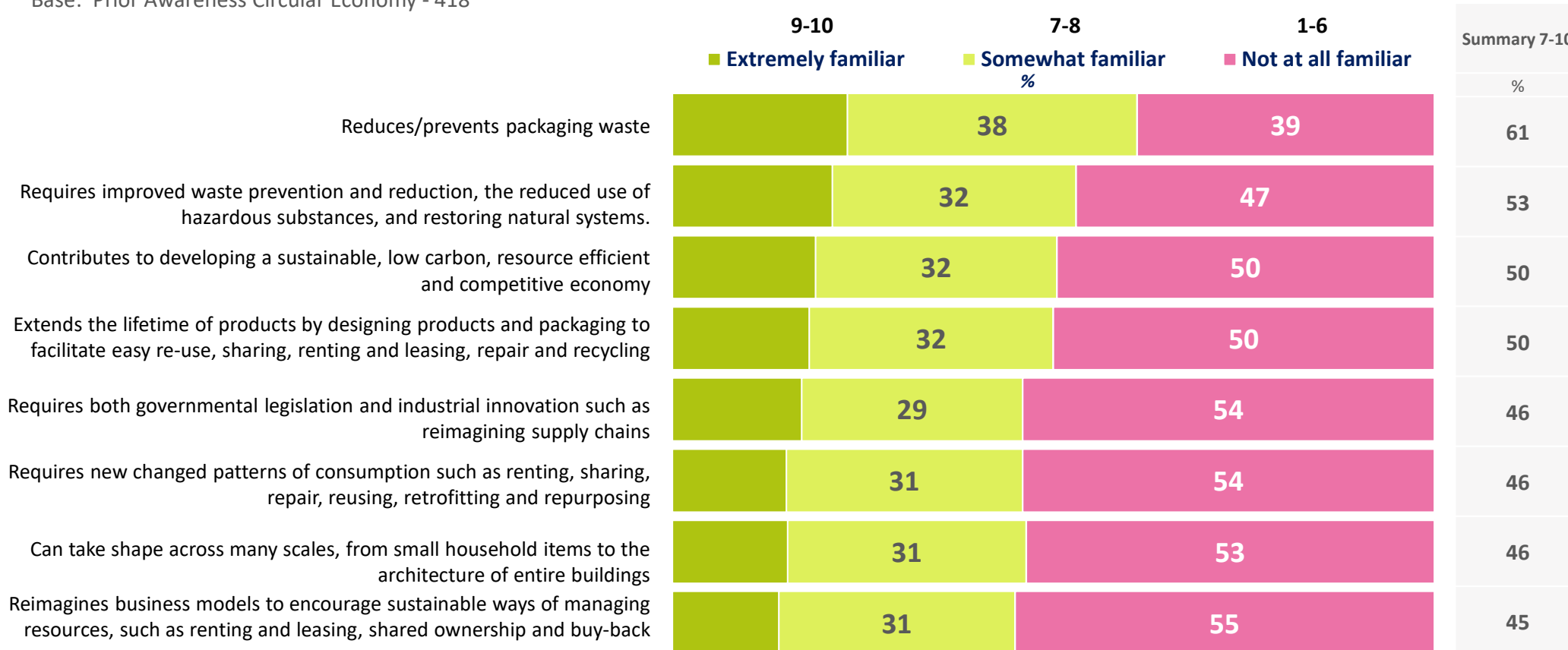
Requires both **governmental legislation and industrial innovation** such as reimagining supply chains

Can take shape **across many scales**, from small household items to the architecture of entire buildings



Circular Economy - *Detailed familiarity*

Base: Prior Awareness Circular Economy - 418

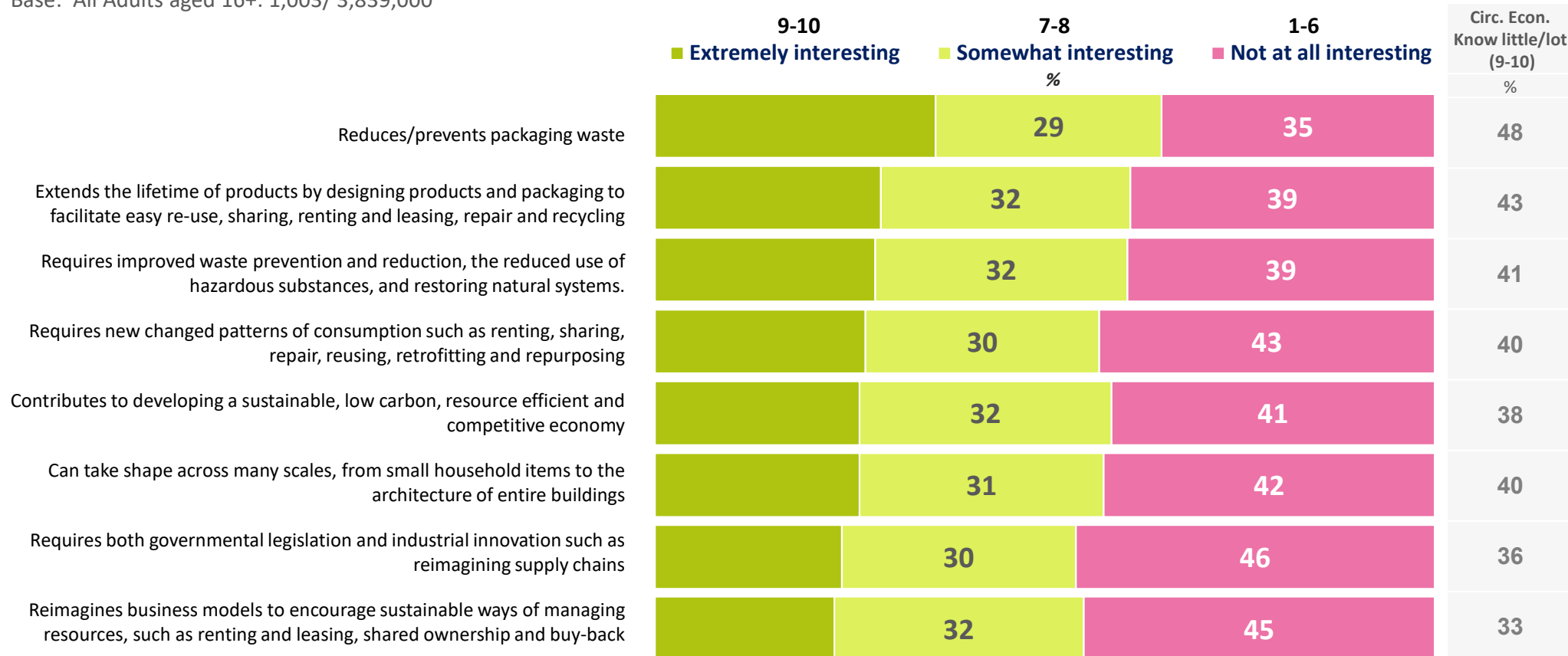


Detailed familiarity among those with prior knowledge of the Circular Economy is modest, peaking in relation to 'reduces/prevents packaging waste'.



Circular Economy - Detailed Interest

Base: All Adults aged 16+: 1,003/ 3,839,000



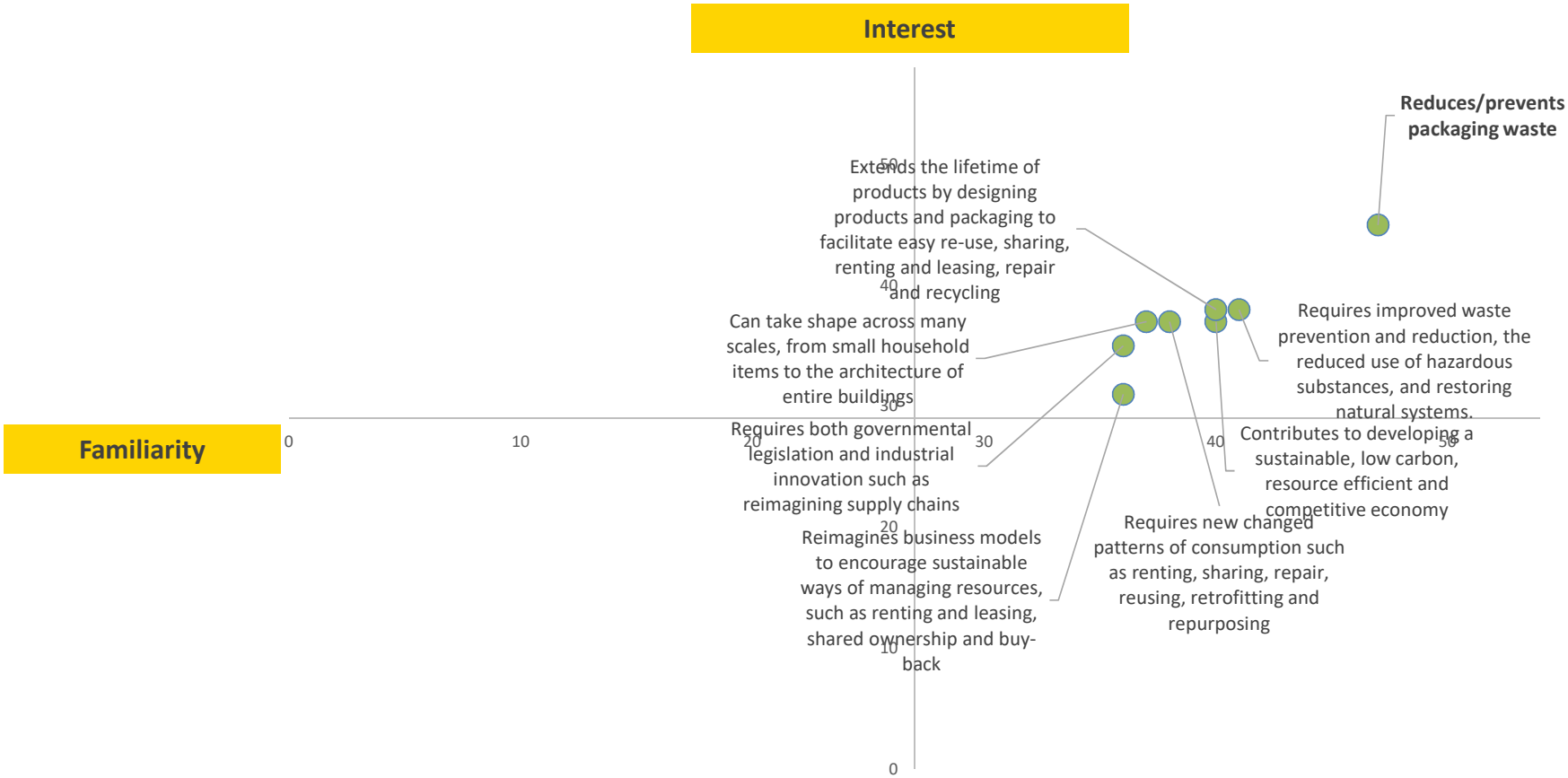
Interest peaks for 'reduces/prevents packaging waste'; interest levels, while evident, are largely similar thereafter.



Circular Economy: Knowledge matrix - familiarity and interest



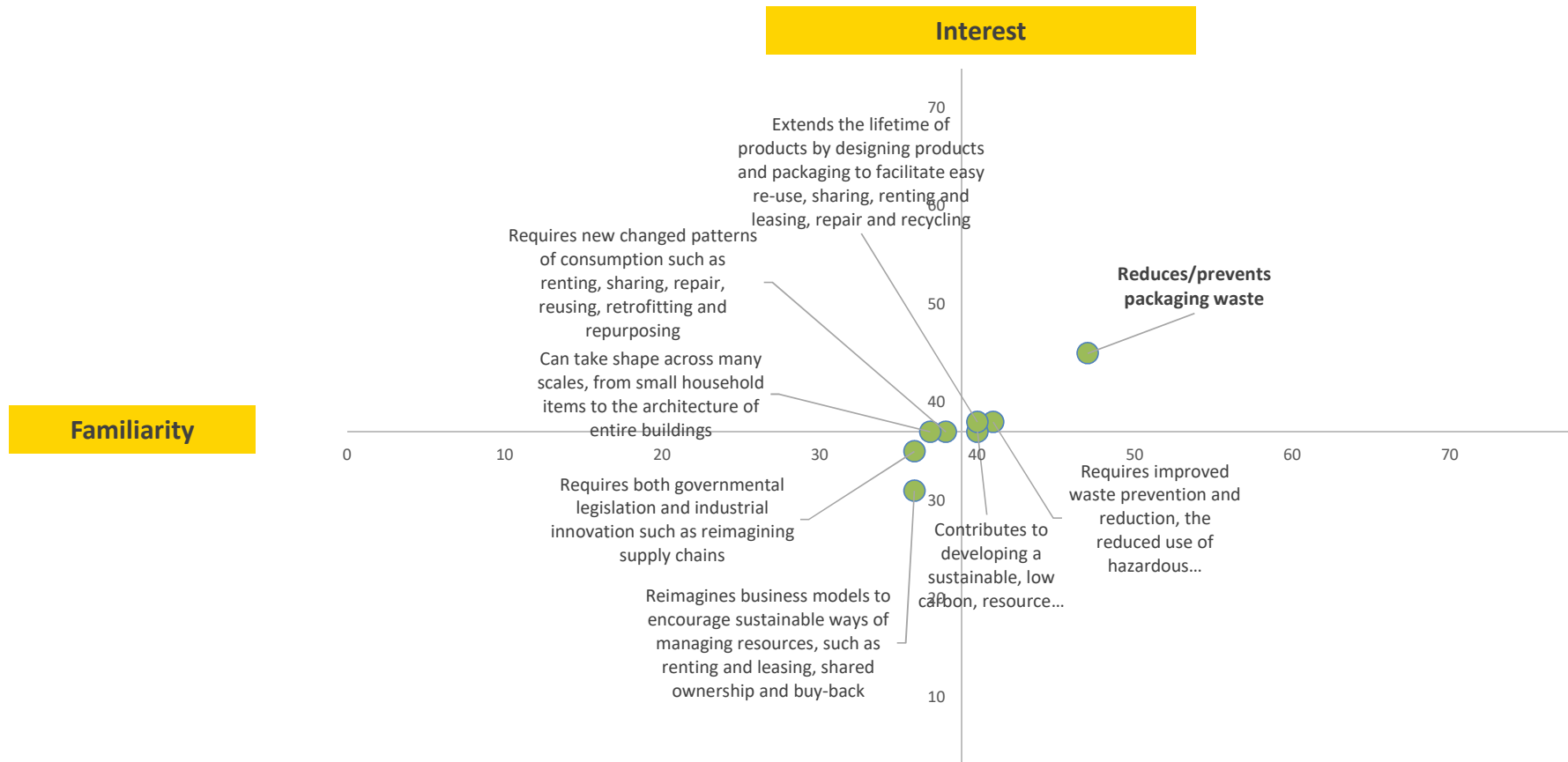
Base: All Adults aged 16+: 1,003/ 3,839,000



The knowledge matrix highlights the undifferentiated pattern outside of the engagement with 'packaging waste'

Circular Economy: *Knowledge matrix - familiarity and interest*

Base: High Ethically Minded N - 501



When the knowledge matrix is applied to those High Ethically Minded, the same basic pattern emerges (undifferentiated outside of 'packaging waste')

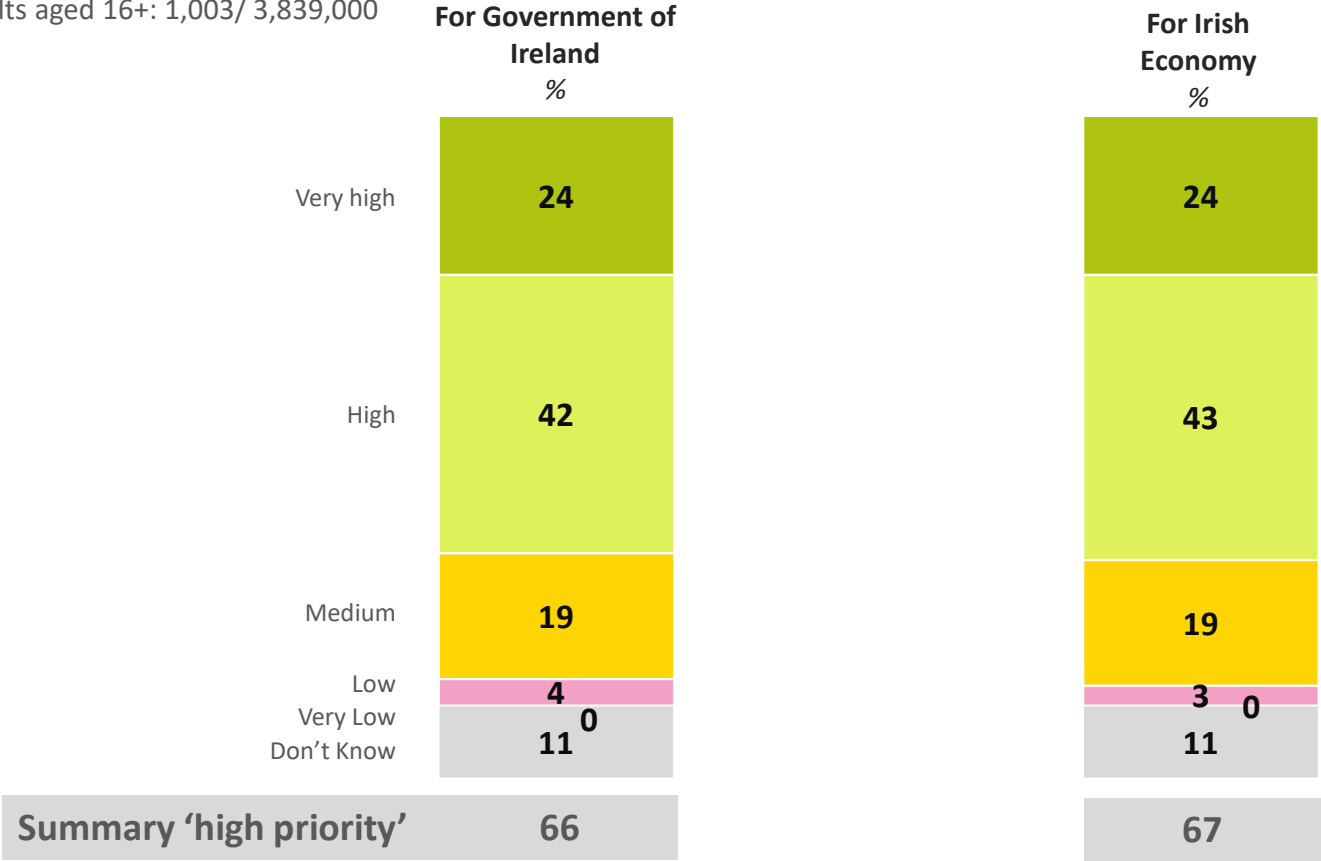




Circular Economy: National Approach

Circular Economy: *National priority*

Base: All Adults aged 16+: 1,003/ 3,839,000



'High Priority' (66% + 67%) peaks among:

ABC1s (72% + 73%)

Rural (72% + 71%)

High ethically minded (78% + 80%)

No sig. diff. by age /gender

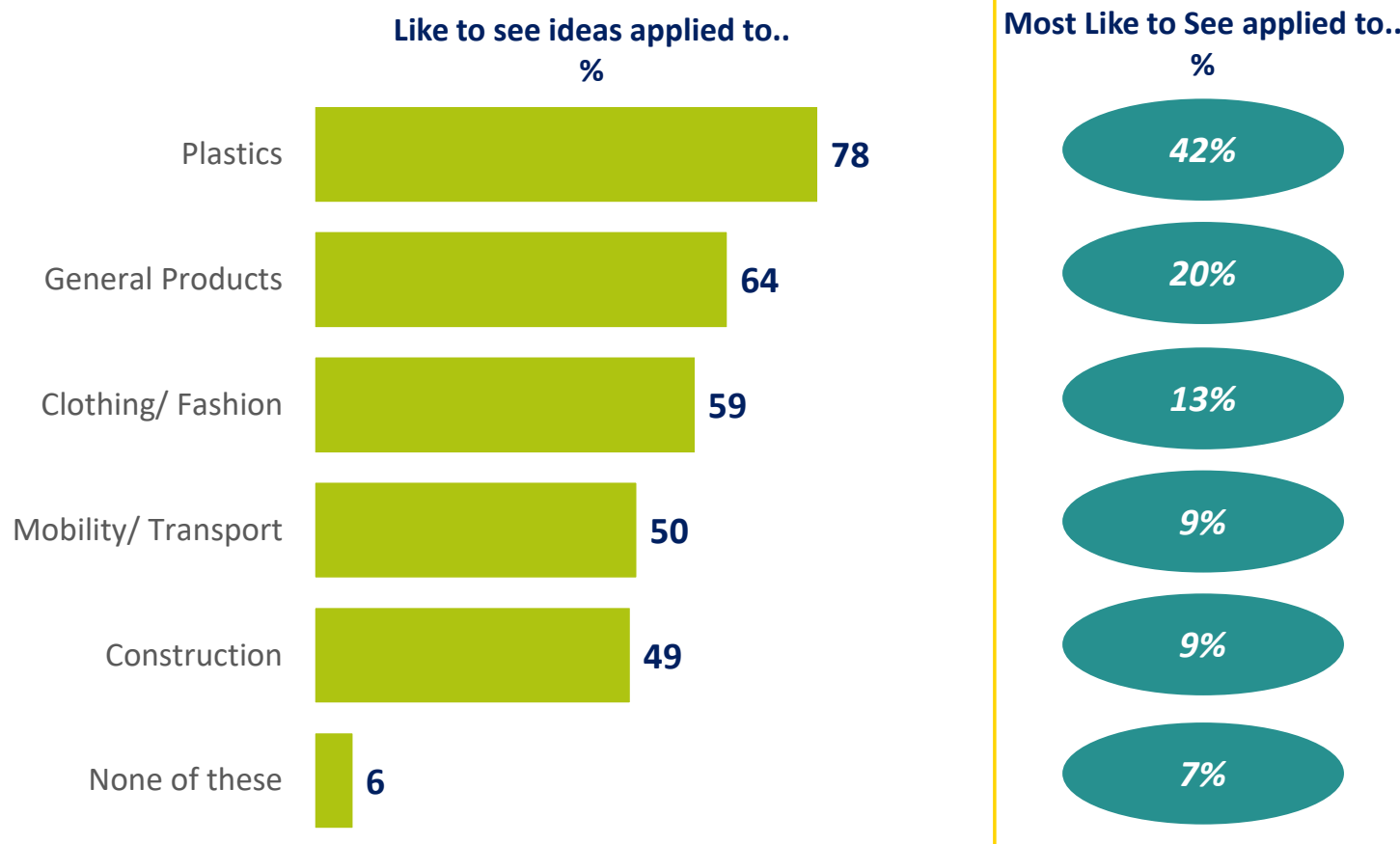
Despite modest familiarity, well over 60% of adults think the Circular economy should be 'high' priority of both the Government and Irish businesses.



Q.7a Do you think the Circular Economy should be a high, medium, or low priority for the Government of Ireland?
Q.7b Do you think the Circular Economy should be a high, medium, or low priority for Irish businesses?

Circular Economy: Application to economic sectors

Base: All Adults aged 16+: 1,003/ 3,839,000



We would most like to see Circular Economy ideas applied to 'Plastics'.

Q.8a Which, if any, of the following sectors would you like to see the ideas of the Circular Economy applied to?
Q.8b Which, if any, of the following sectors would you most like to see the ideas of the Circular Economy applied to?

Supporting Circular Economy: *Perceived Impact*



Base: All Adults aged 16+: 1,003/ 3,839,000



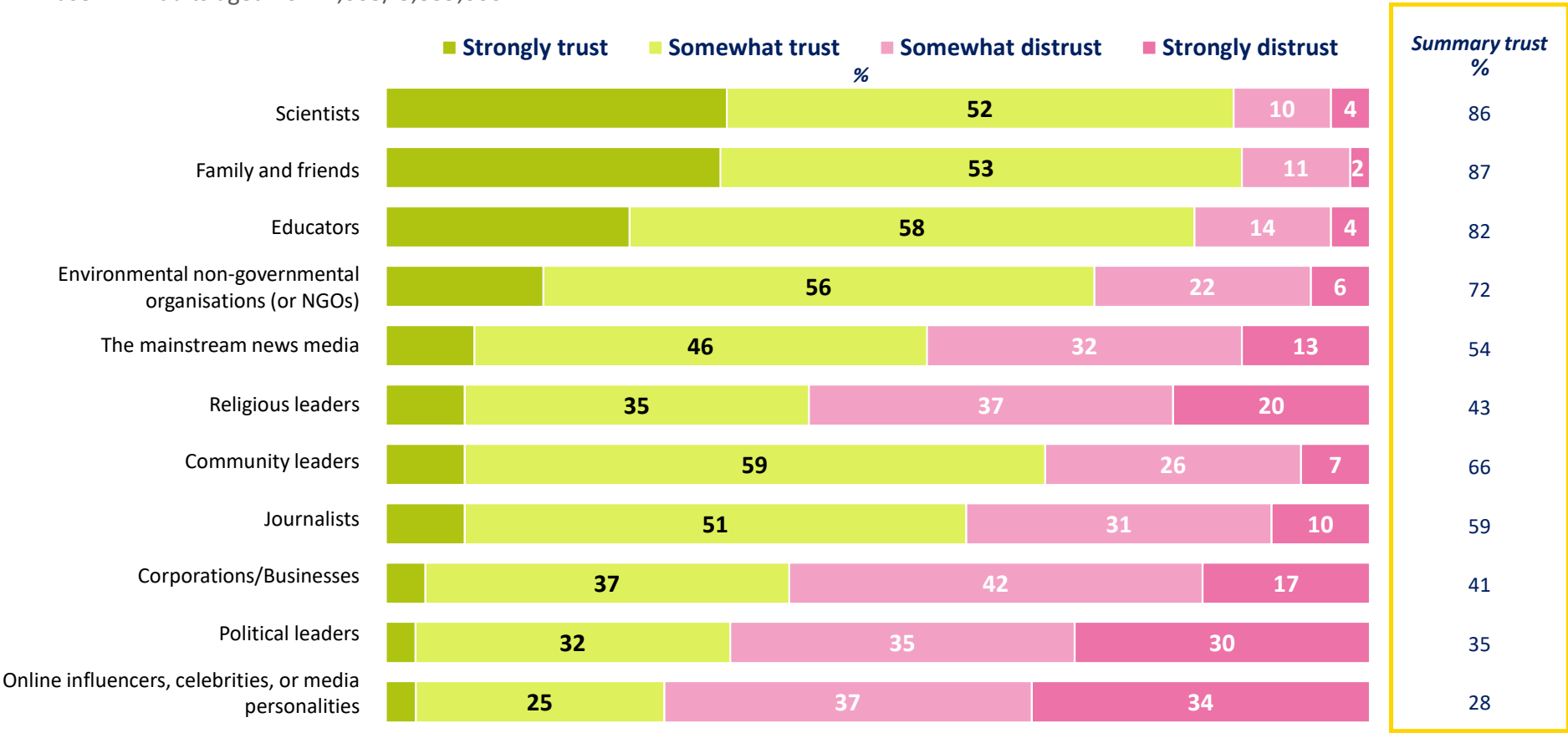
Highly consistent across demographics; improve 'economic growth' peaks Rural (84%)

Biggest perceived impact relates to 'quality of life', 'Society's health and wellbeing' and 'quality of products'.



Circular Economy: Trusted sources of info

Base: All Adults aged 16+: 1,003/ 3,839,000



Strong trust in scientists & educators peaks among the High Ethically minded (44%, 39%)

Scientists, family and friends and educators are our most trusted sources on the Circular Economy; Businesses, Politicians and media celebrities the least.





Summary & Conclusions

Circular Economy National Survey - Key Learnings.



1.

Just under half of all Irish adults can be defined as *ethically minded*; they are much more inclined to engage with the Circular Economy than others.

2.

Only one in four Irish adults have heard of the term *Circular Economy*. We will need to reflect on how we describe the Circular Economy; only 35% appear to understand the summary description as is.

3.

Our tentative understanding likely inhibits support: 25% consider moving to the Circular Economy as an *extremely good idea*.



4.

As stands, our knowledge and interest peaks in relation to how the Circular Economy relates to reducing/preventing packaging waste; beyond this interest is largely undifferentiated.

5.

Despite our modest understanding, well over 60% of adults think the Circular Economy should be a high priority of both the Government and Irish businesses.

6.

The biggest perceived impact from supporting the Circular Economy relates to *quality of life*, society's health and well-being and the *quality of products*.

7.

Scientists, family and friends and educators are our most trusted sources on the Circular Economy; with trust in Scientists peeking among the High Ethically Minded.

Next steps

	w/c 18 th Oct	w/c 25 th Oct	w/c 1 st Nov	w/c 8 th Nov	w/c 15 th Nov	w/c 22 nd Nov	w/c 29 th Nov
Presentation of quantitative findings & provision of PPT report							
Qualitative sample, discussion guide & stimulus design							
Finalise forum participant specification							
Recruitment							
Finalise guide & stimulus material							
Fieldwork							
Analysis & report preparation							
Presentation of findings & provision of PPT report							

- Suggest meeting next week to:
 - ❖ Discuss out-takes from quantitative research
 - ❖ Review draft forum guide & receive input from Rediscovery Centre
 - ❖ Finalise forum participant specification
- Recruitment 29th October – 5th November
- Fieldwork w/c 8th November

Thank you.



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Delve Deeper



REDISCOVERY
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Circular Economy National Survey 2023

J.224176

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20.06.2023

Circular Economy National Survey

**Circular Economy:
Understanding**

**Circular Economy:
Familiarity & Interest**

**Circular Economy:
National Approach**

**Ethically Minded
Consumer Behaviour**

Key Learnings

Circular Economy National Survey

Research background and objectives



The purpose of this National Survey was to establish levels of awareness, understanding and appeal of concepts relating to the 'Circular Economy'.

The survey approach allows us to assess how various demographic cohorts may vary in their engagement with the circular economy.

These results build on those from the Baseline National Survey of 2021.

Survey results are based on a sample of 1,006 adults aged 16+, quota controlled in terms of age, gender, socio-economic class and region to reflect the profile of the adult population of the Republic of Ireland. All interviewing was conducted via face-to-face interviewing on B&A's National Barometer Survey.

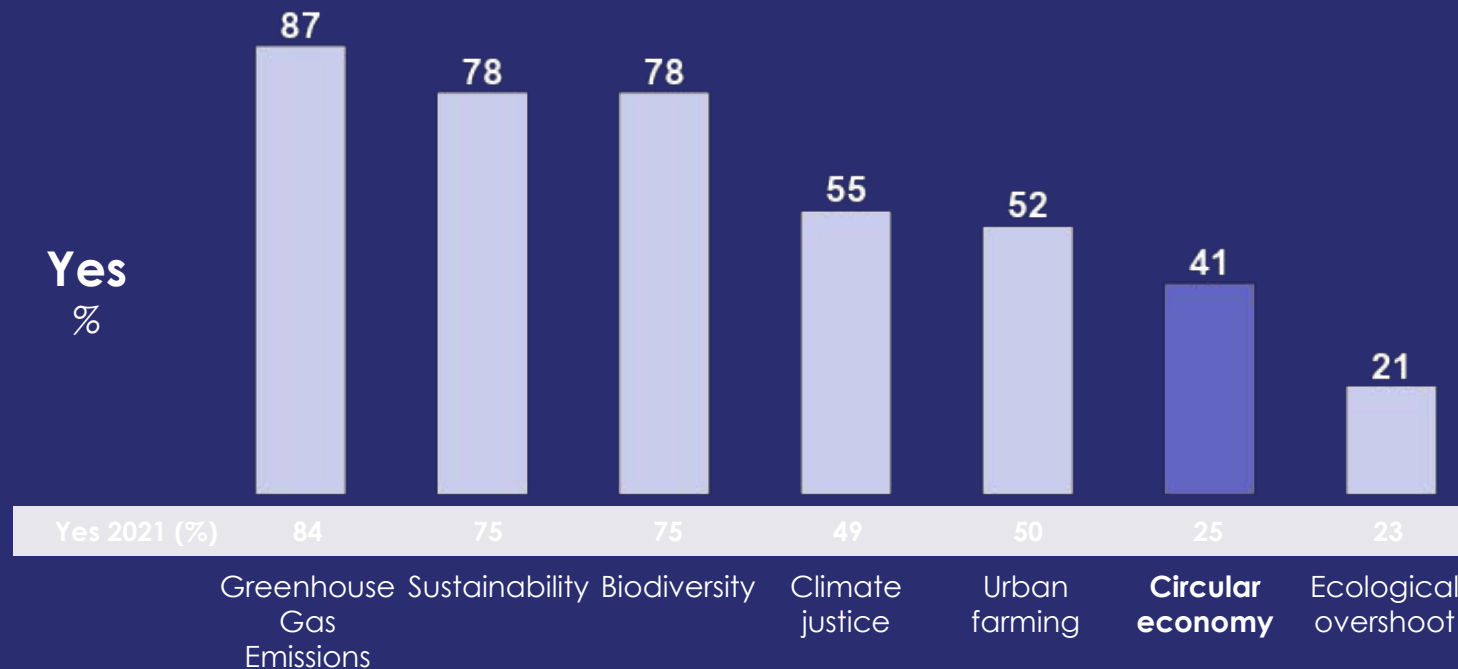
All aspects of the survey were conducted in accordance with ESOMAR and AIMRO guidelines.

Survey interviewing was conducted between 13th-26th April 2023.

Circular Economy: Understanding

Environmental Terms: Recognition

Name

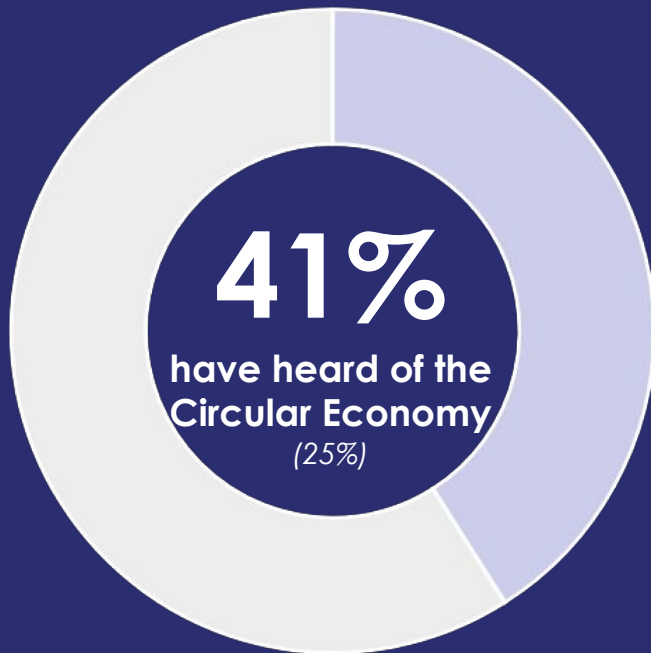


The term 'Circular Economy' registered a **16 ppt** increase since 2021,

However, the general public remains more familiar with terms like Greenhouse Gas Emissions, Sustainability and Biodiversity.

Q.1 Which of the following terms have you heard of? Base: All adults 16+ - 1,006

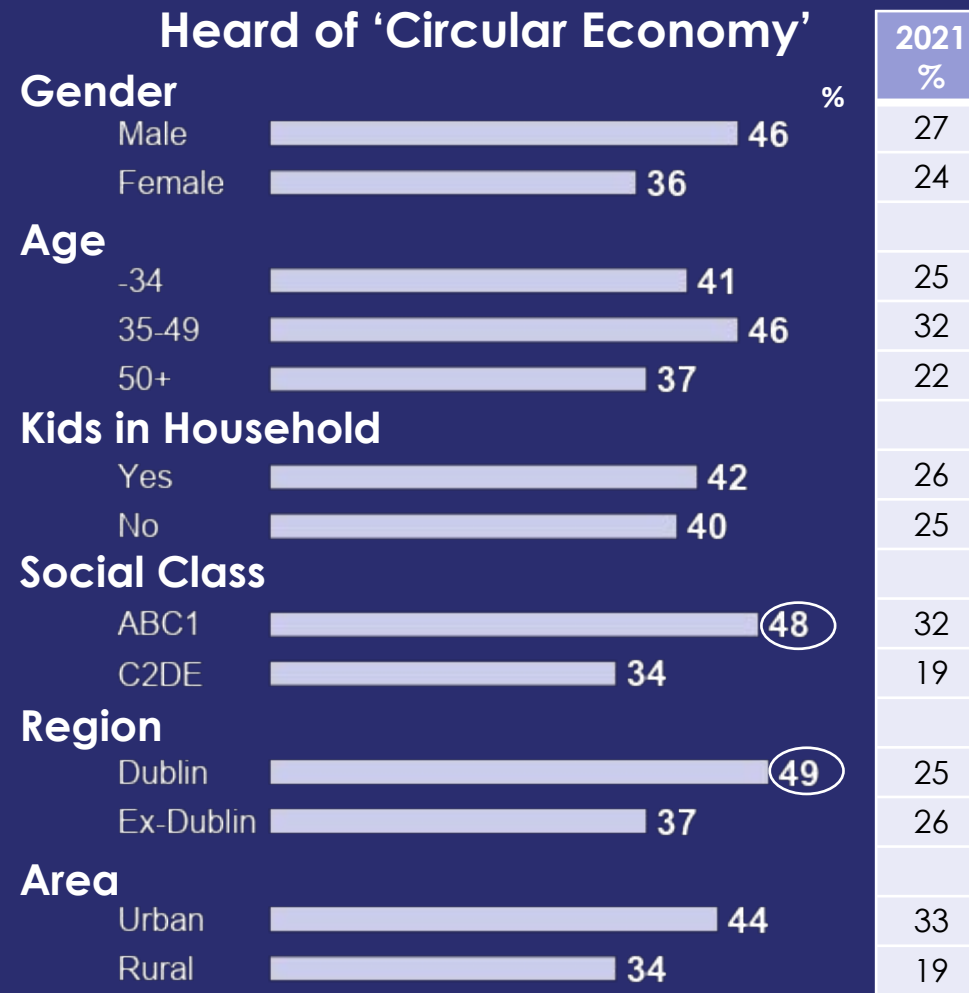
Circular Economy: Name Recognition



Est. of population who have heard
about Circular Economy:
1,600,000

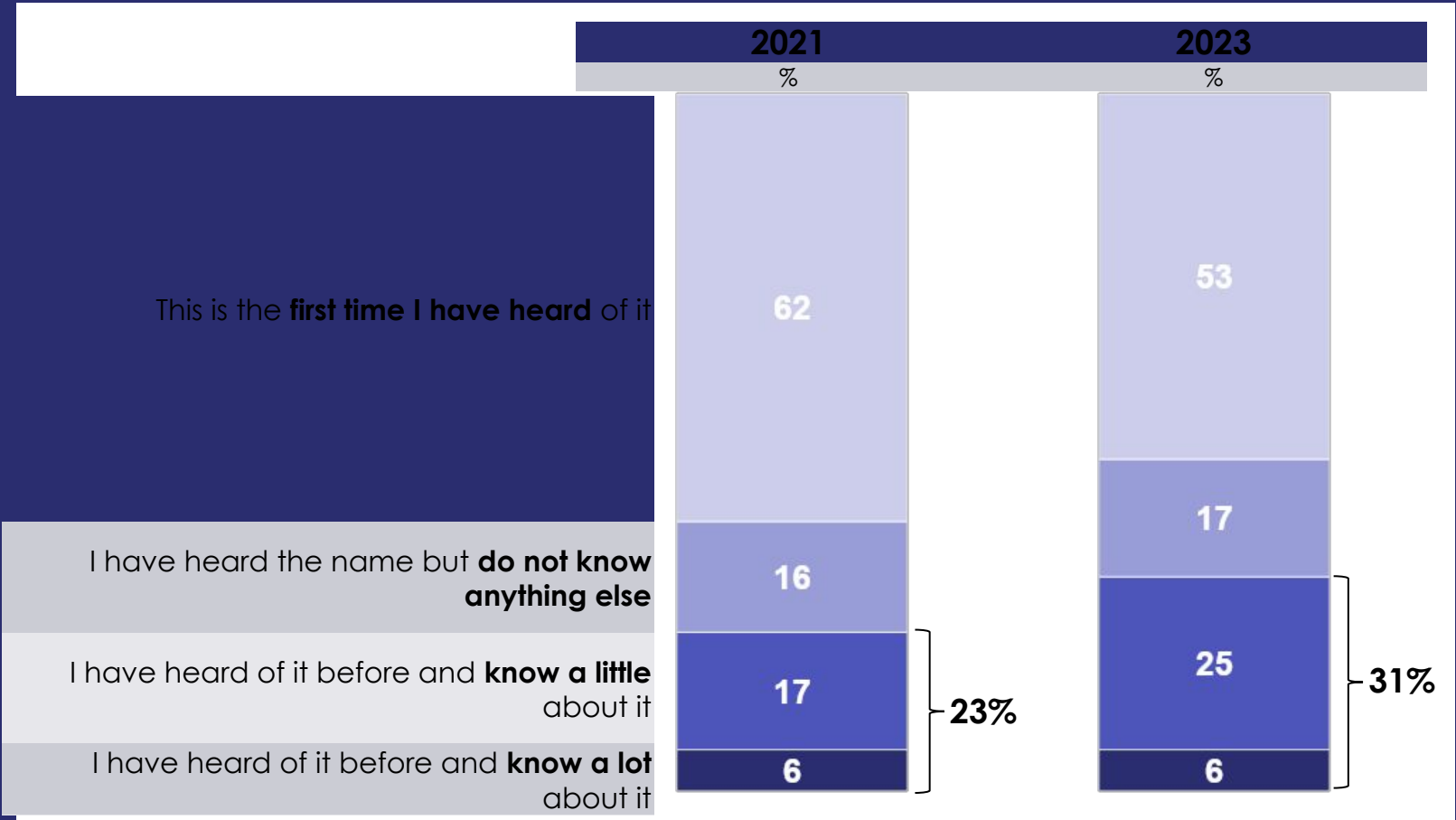
()=2021

Q.1 Which of the following terms have you heard of? (Base: All adults 16+ - 1,006)



1 in 4
have heard of
'Circular Economy'
with Dubliners and
ABC1 more likely to
have heard the
term.

Circular Economy: Public Familiarity



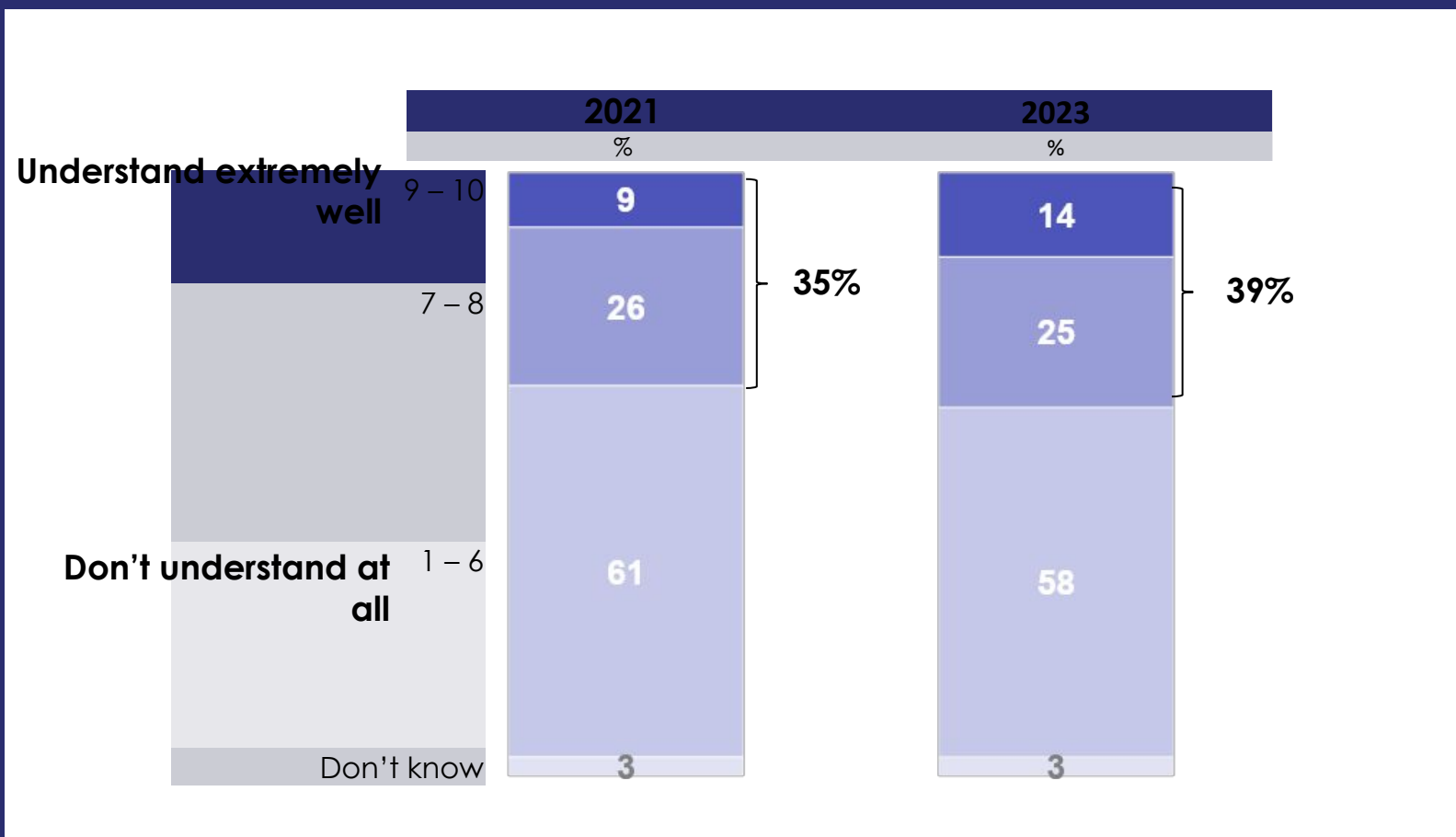
Knowing at least something about Circular Economy increased by

+8 ppt
Since 2021.

Explanation included in the survey:
'A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service. '

Q.2 Before today how familiar were you with the meaning of the term Circular Economy? (Base: All Adults aged 16+: 1,006)

Circular Economy: Prompted Understanding



More than half continue to struggle with understanding the concept of Circular Economy as explained in the survey.

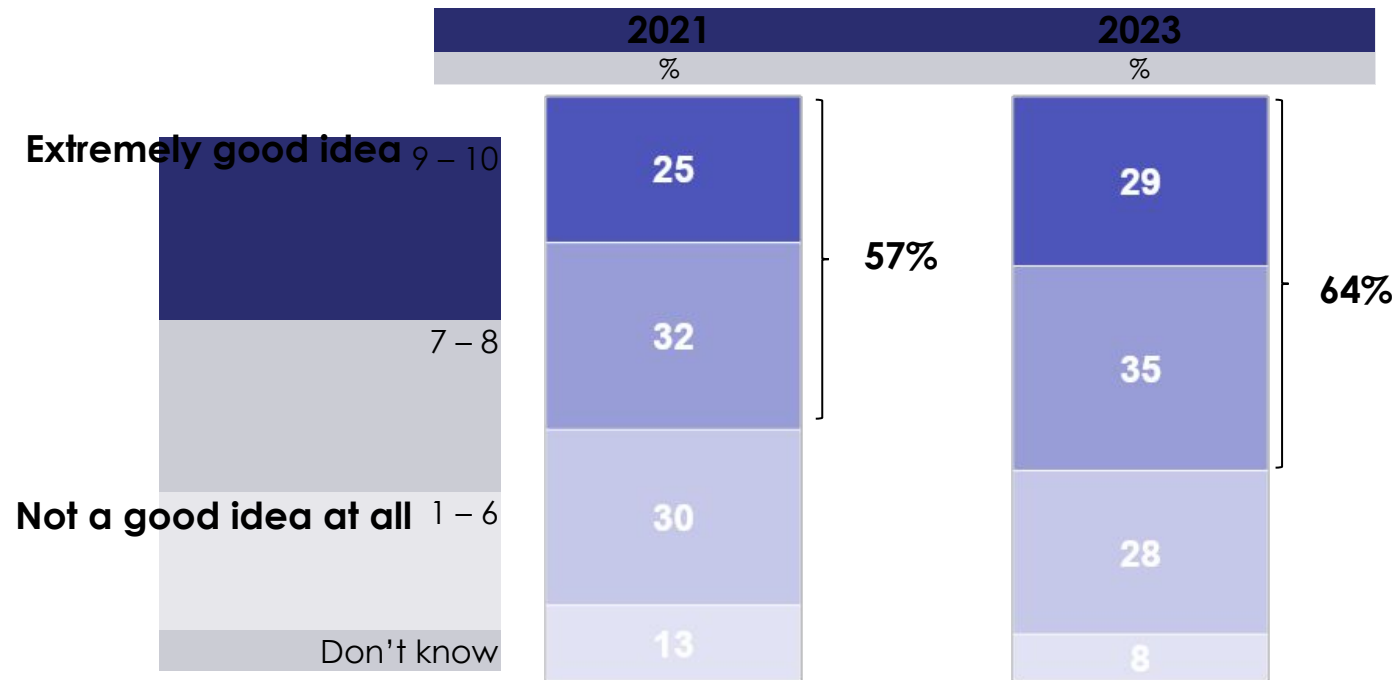
On the positive side, those who understand it extremely well increased by **5ppt.**

Explanation included in the survey:
'A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.'

Q.3 To what extent do you now feel you understand the idea of a Circular Economy? (Base: All Adults aged 16+: 1,006)

Circular Economy: Overall Support

Moving to a Circular Economy is a good idea



64%

believe that moving to a
Circular Economy is a
good idea, which is a

7 ppt

increase since 2021.

Q.4 To what extent do you think moving to a Circular economy is a good idea? (Base: All Adults aged 16+: 1,006)

Circular Economy: Understanding Summary

	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1006	483	523	275	275	456	547	459	281	725	664	342
	%	%	%	%	%	%	%	%	%	%	%	%
Public Familiarity	31	33	28	29	36	28	38	23	38	28	33	26
Understanding (7-10)	39	44	35	39	46	36	47	33	38	40	39	40
Good idea (7-10)	64	66	63	61	68	64	67	62	65	64	66	60

Public familiarity and Understanding peak among ABC1s.

Q.2 Before today how familiar were you with the meaning of the term Circular Economy? (Base: All Adults aged 16+: 1,006)

Q.3 To what extent do you now feel you understand the idea of a Circular Economy? (Base: All Adults aged 16+: 1,006)

Q.4 To what extent do you think moving to a Circular economy is a good idea? (Base: All Adults aged 16+: 1,006)

Circular Economy: Familiarity & Interest

Circular Economy:

Detailed Familiarity & Interest

Involves businesses reducing the quantity of waste they generate and the amount of harmful substances their waste contains

Requires businesses offering people new ways to access products such as renting, leasing and purchasing second hand.

Organisations and people together changing the way they make, purchase and use products to develop a climate friendly and strong economy.

Involves designing products so their lifetime and usability is extended.

Reduces/prevents packaging waste

Involves people changing the way they access and use products by emphasising renting, sharing, repairing, and reusing.

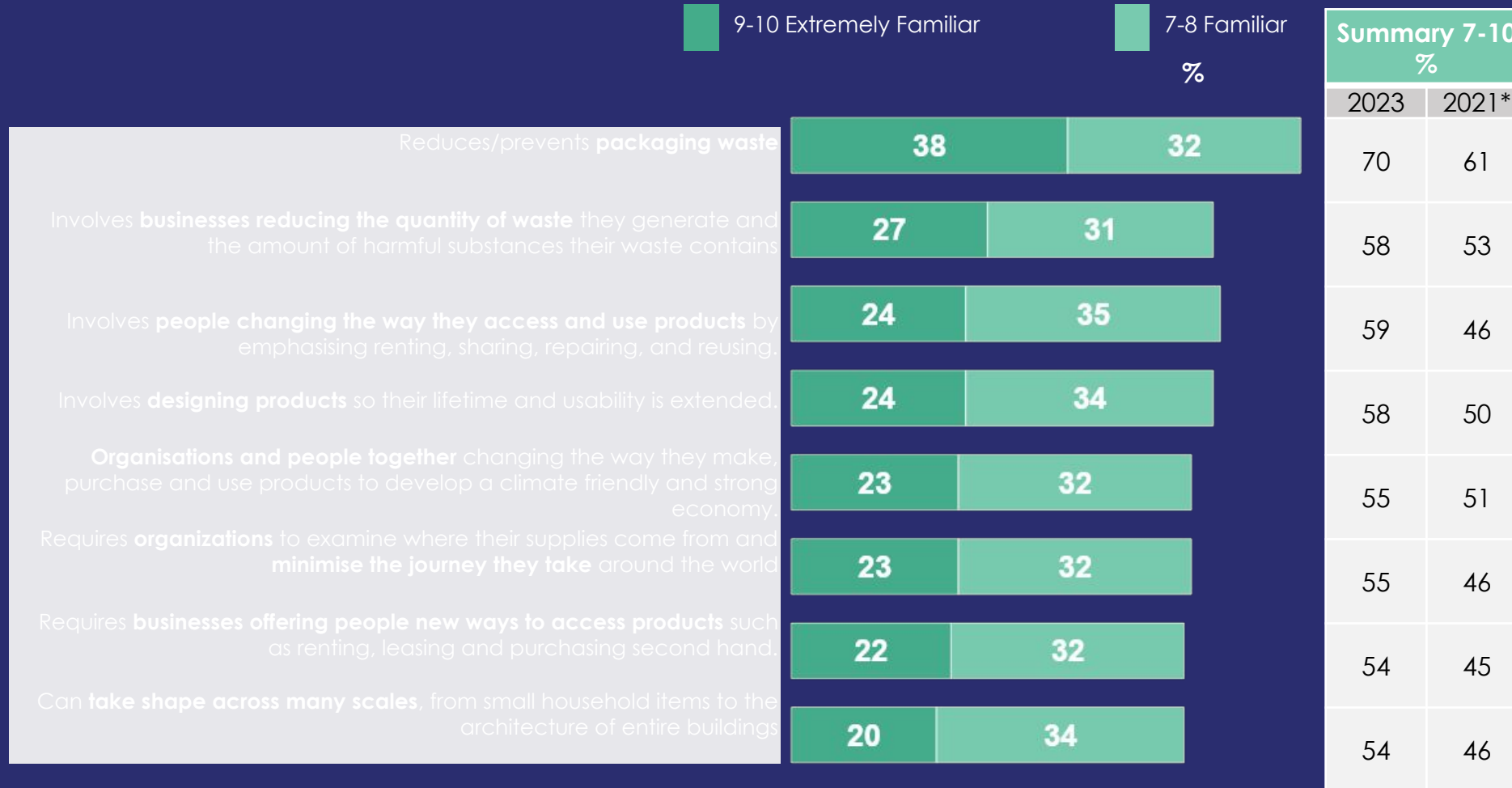
Requires organizations to examine where their supplies come from and minimise the journey they take around the world

Can take shape across many scales, from small household items to the architecture of entire buildings

Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved (Base: Prior Awareness Circular Economy - 515)

Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you? (Base: All Adults aged 16+: 1,006)

Circular Economy: Detailed Familiarity



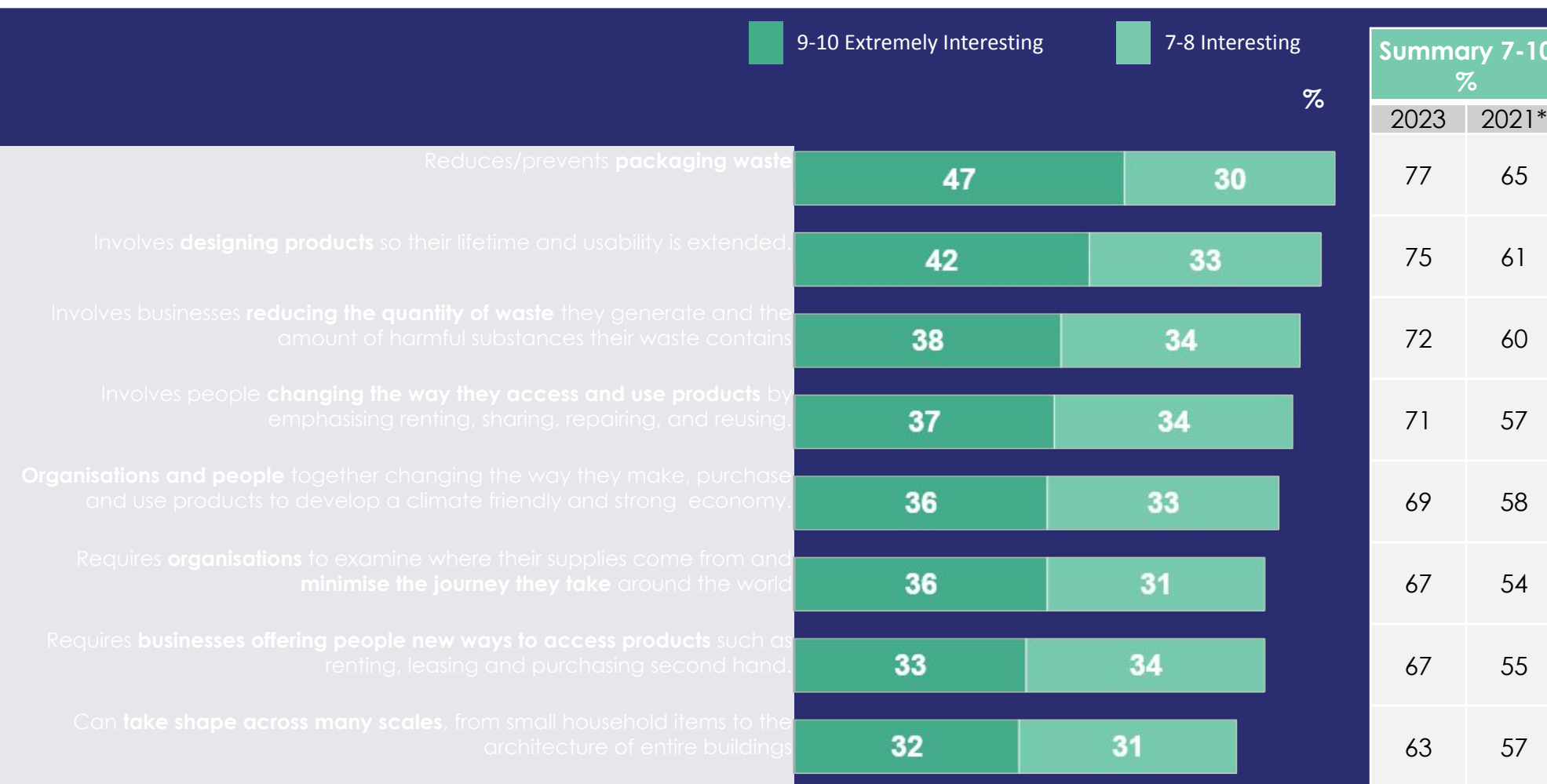
Good familiarity with Circular Economy aiming at reducing and preventing packaging waste.

Familiarity is significantly lower for all the other features.

* Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results

Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved ... (Base: Prior Awareness Circular Economy - 515)

Circular Economy: Detailed interest



Interest in the Circular Economy features is quite high among the general public.

Reduction and prevention of waste and products design are considered the most interesting features.

* Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results

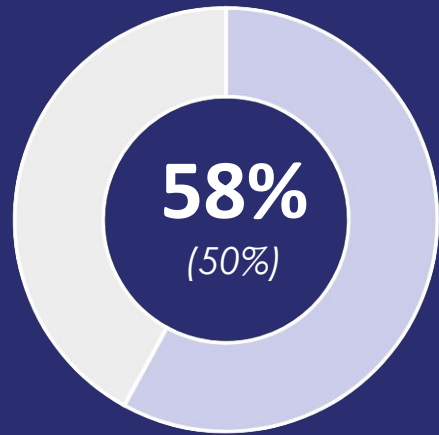
Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you? (Base: All Adults aged 16+: 1,006)

Circular Economy:

Average Familiarity and Interest across Demos

Average Familiarity

(scores 7-10)



Gender



Age



Kids in Household



Social Class



Region

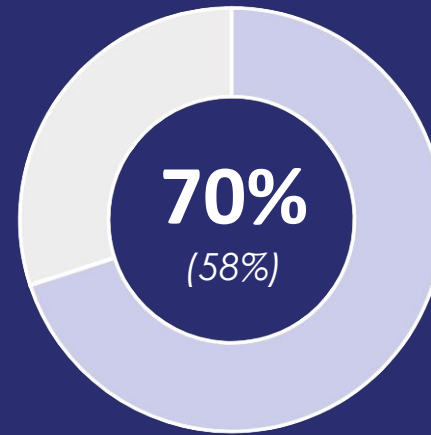


Area



Average Interest

(scores 7-10)



Gender



Age



Kids in Household



Social Class



Region



Area

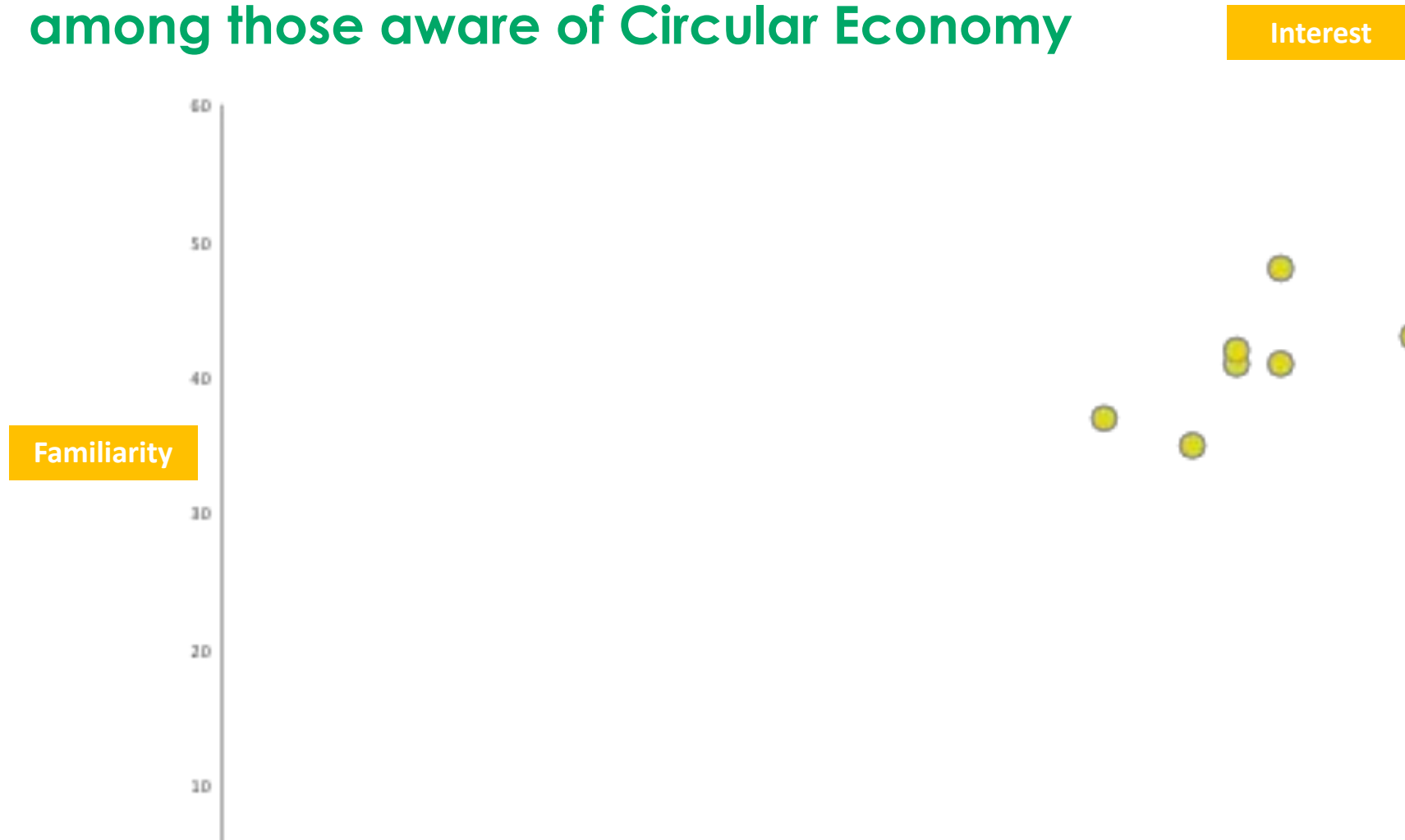


Familiarity peaks among ABC1 and Dubliners. Both overall familiarity and interest have increased substantially since 2021

Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved ... (Base: Prior Awareness Circular Economy - 515)

Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you? (Base: All Adults aged 16+: 1,006)

Circular Economy: Knowledge Matrix of Familiarity and Interest among those aware of Circular Economy

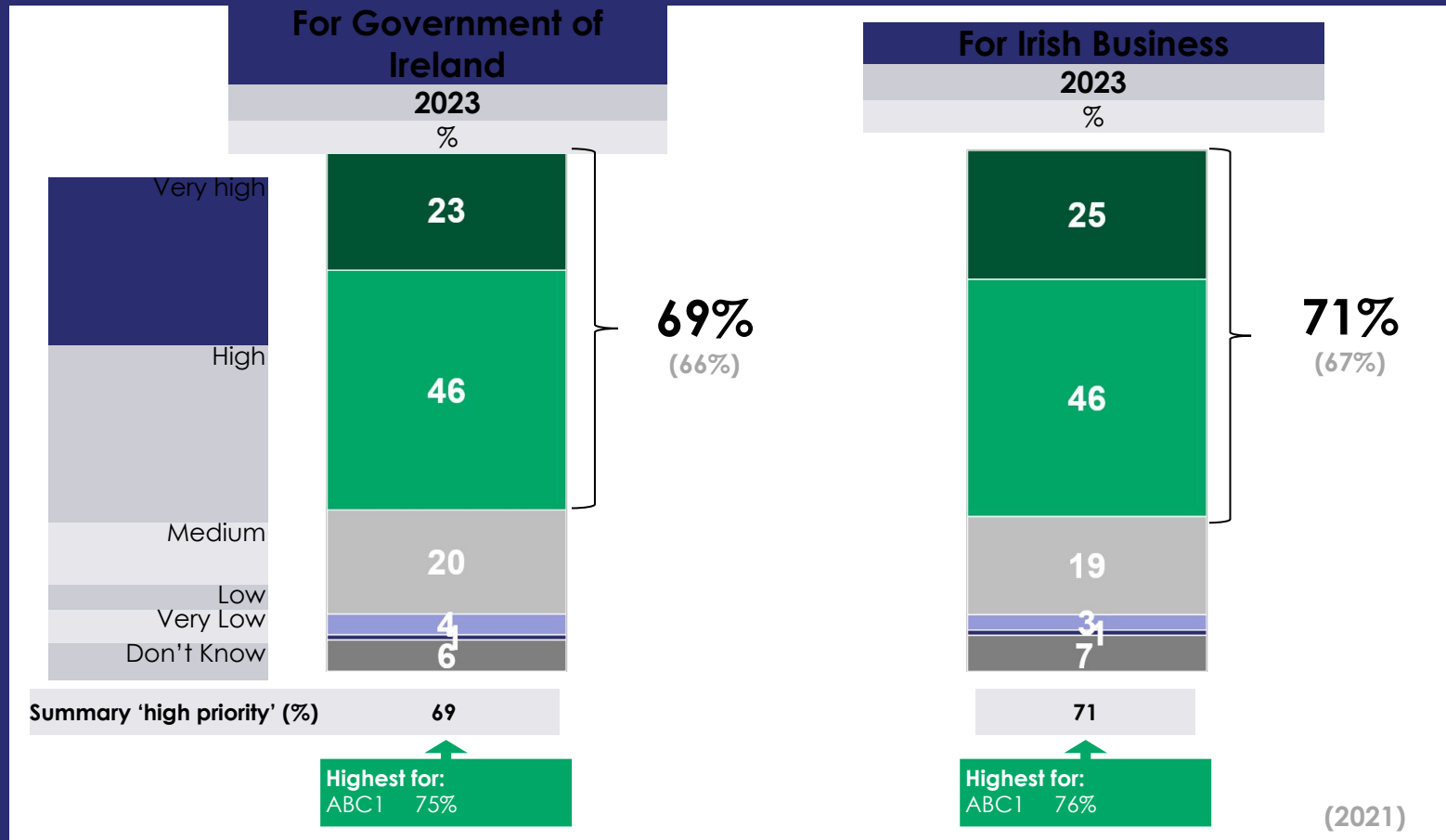


* Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results'

Interest in the Circular Economy features tend to be higher than familiarity among those who have at least heard about Circular Economy. The main exception is 'reduces/prevents packaging waste' that registered high interest and familiarity; note, 'businesses and waste' also encroaches on the top right quartile (max interest & familiarity) this year.

Circular Economy: National Approach

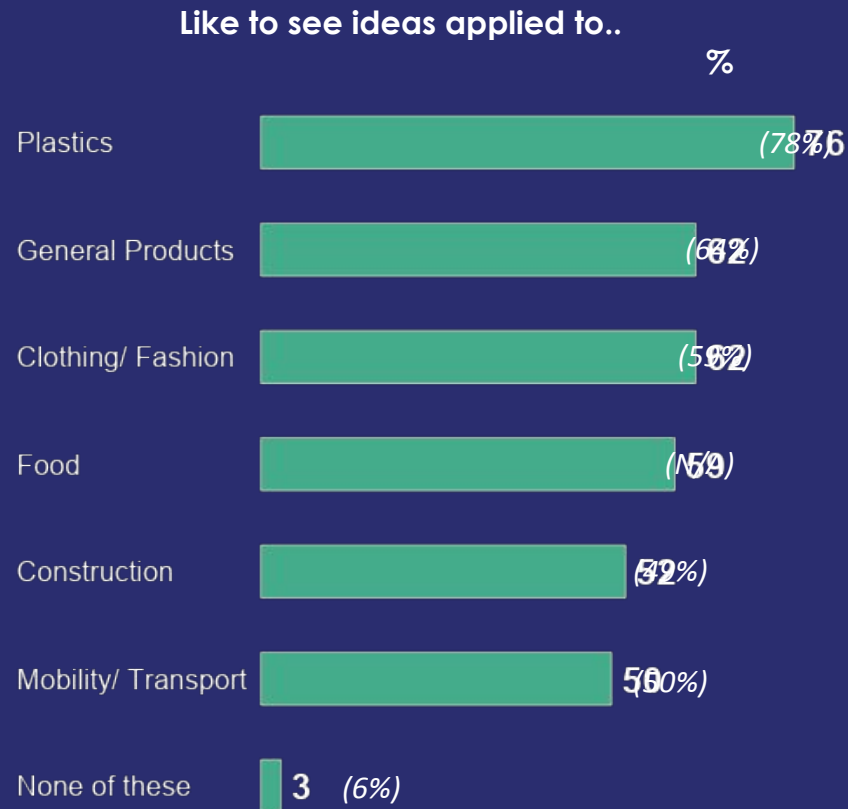
Circular Economy: Should it Be a Priority?



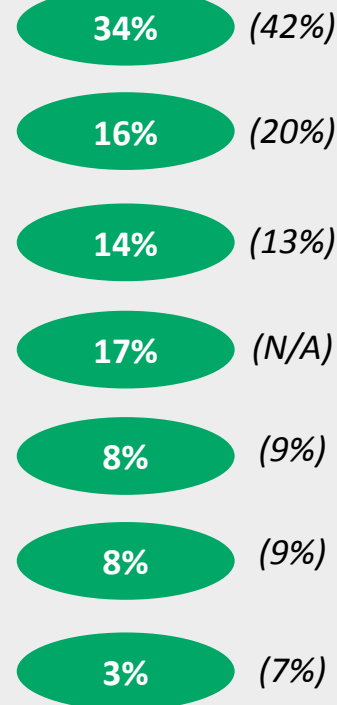
C. 70%
of Irish adults think the Circular Economy should be a high priority for both the Irish government and Irish businesses; showing an increase on 2021; and peaking significantly among ABC1s.

Q.7a Do you think the Circular Economy should be a high, medium, or low priority for the Government of Ireland?
Q.7b Do you think the Circular Economy should be a high, medium, or low priority for Irish businesses? Base: All adults 16+ - 1,006

Circular Economy: Application to economic sectors



Most Like to See applied to..
%



A large majority would like to see ideas of the Circular Economy applied to Plastics, followed by General Products and Clothing.

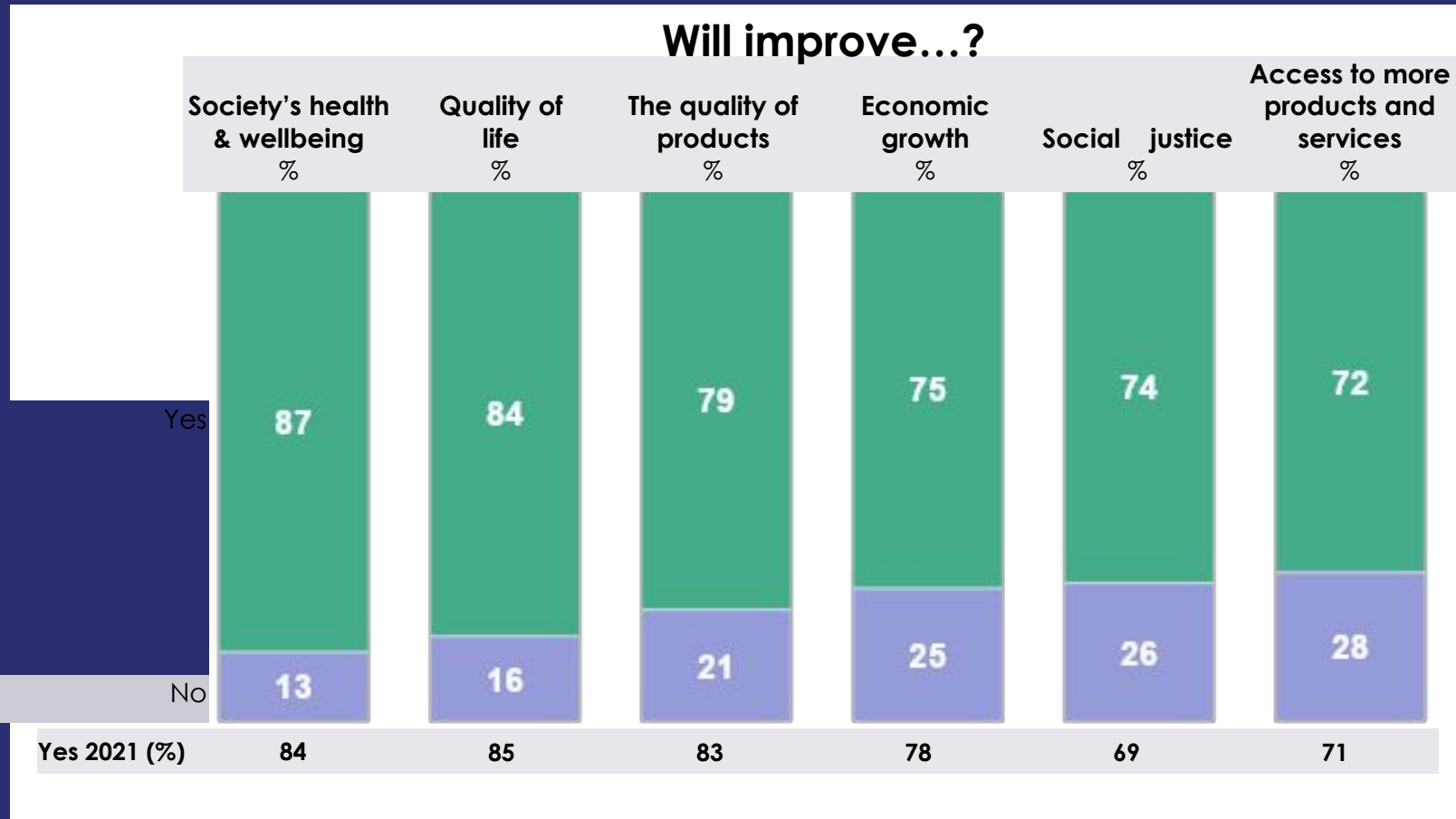
To be noted that interest in applying Circular Economy ideas to clothing increased by **3ppt** since 2021.

() = 2021

Q.8a Which, if any, of the following sectors would you like to see the ideas of the Circular Economy applied to? (Base: Prior Awareness Circular Economy - 515)

Q.8b Which, if any, of the following sectors would you most like to see the ideas of the Circular Economy applied to? Base: All Adults aged 16+: 1,006)

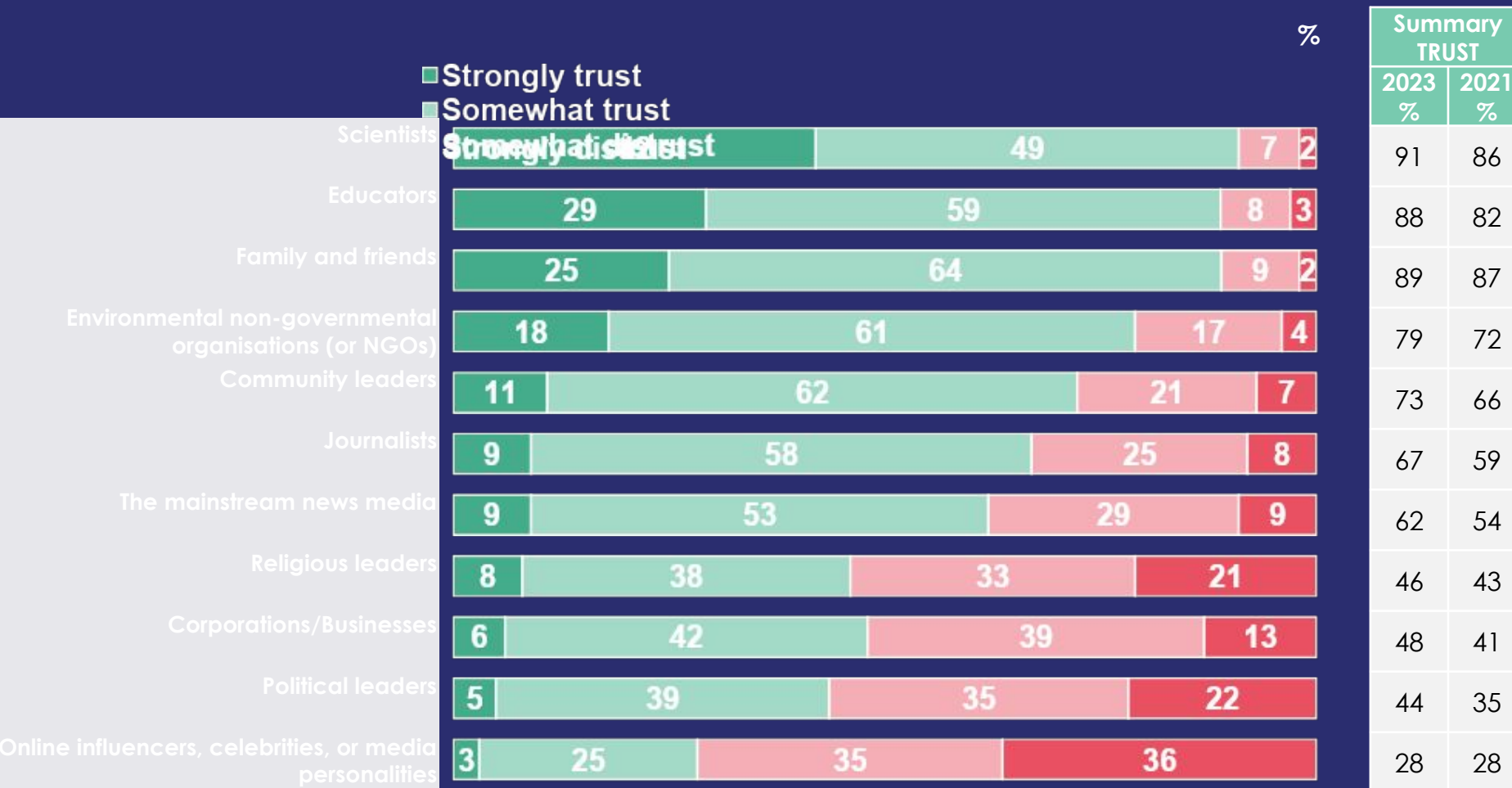
Circular Economy: Its Benefits



The vast majority believe supporting the Circular Economy will improve society across a range of criteria; peaking for health & well-being and quality of life; near 8 in 10 think it will improve the quality of products.

Q.9 Overall, do you think that taking action to support a Circular Economy will improve or not each of the following? Base: All adults 16+ - 1,006

Circular Economy: Trusted Sources of Info

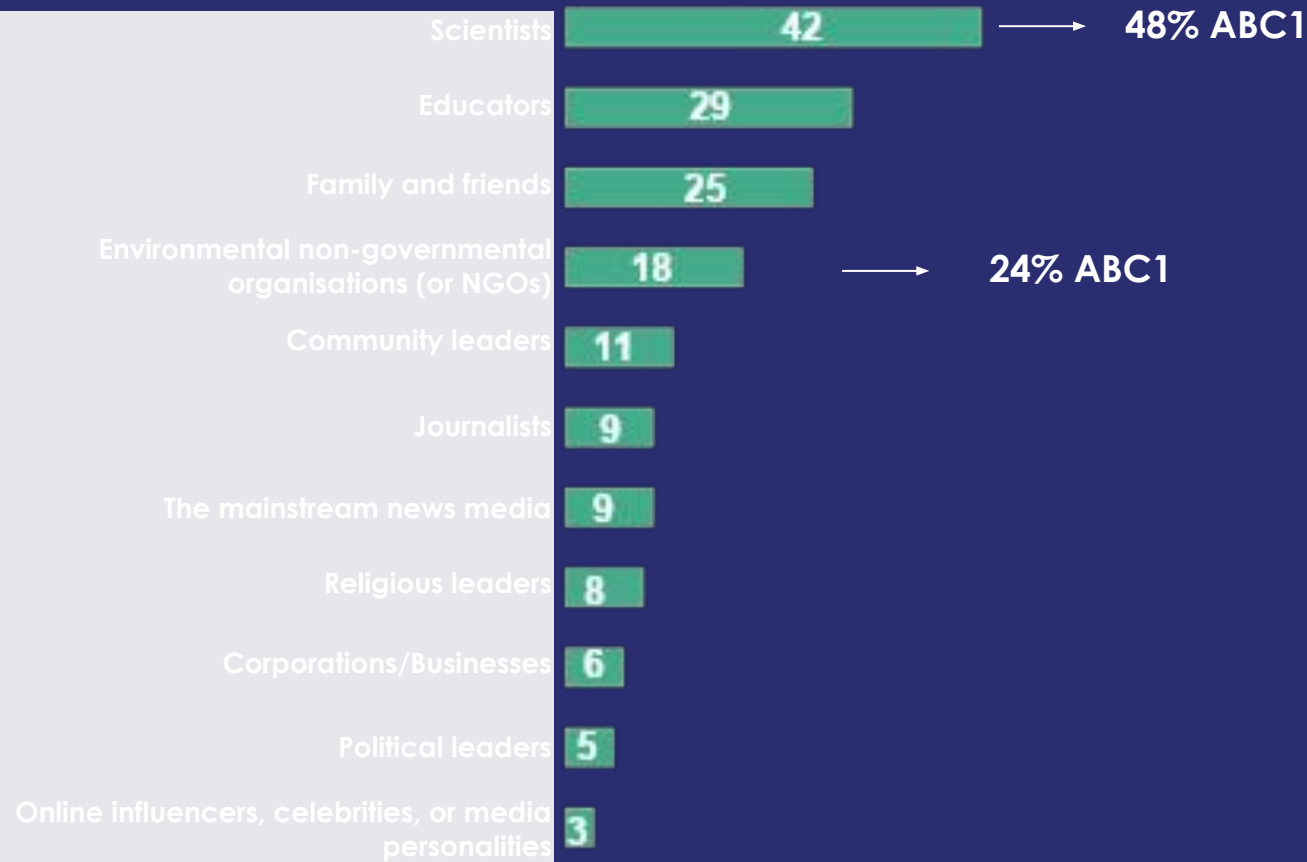


Scientists are the most trusted source of information about the Circular Economy. Educators, family and friends are also considered trustworthy by the majority.

Q.10 How much do you trust or distrust the following as a source of information about the Circular Economy?

Circular Economy: Trusted Sources of Info across demos

%



Minor differences in sources trusted across demographic groups; trust in scientists and NGOs peak among ABC1s.

Q.10 How much do you trust or distrust the following as a source of information about the Circular Economy? (Base: All Adults aged 16+: 1,006)

Circular Economy: Communication routes

Think of the children! We have a **moral duty** to create a circular economy for the benefit of future generations and a healthy environment.

Why throw away money and resources? Being careful with what we have, fixing things when they break, sharing with others, and being economical is better for individuals, our society and our environment

The needs of the many outweigh the needs of the few. It shouldn't prioritize the interests of specific groups or unfairly burden individuals who are already struggling

Fixing things, using them again, sharing with others, and recycling are **better ways to make our lives better, keep us healthy, and feel good.**

We must move towards a sustainable way of life. The Earth's natural resources are dwindling, our planet is getting warmer, and the variety of living things is in a precarious state.

It is important that the circular economy does not stand in the way of economic progress. **It must guarantee that new jobs are created, not lost.**

Climate catastrophe is coming! The world is on fire! **But there is still hope**

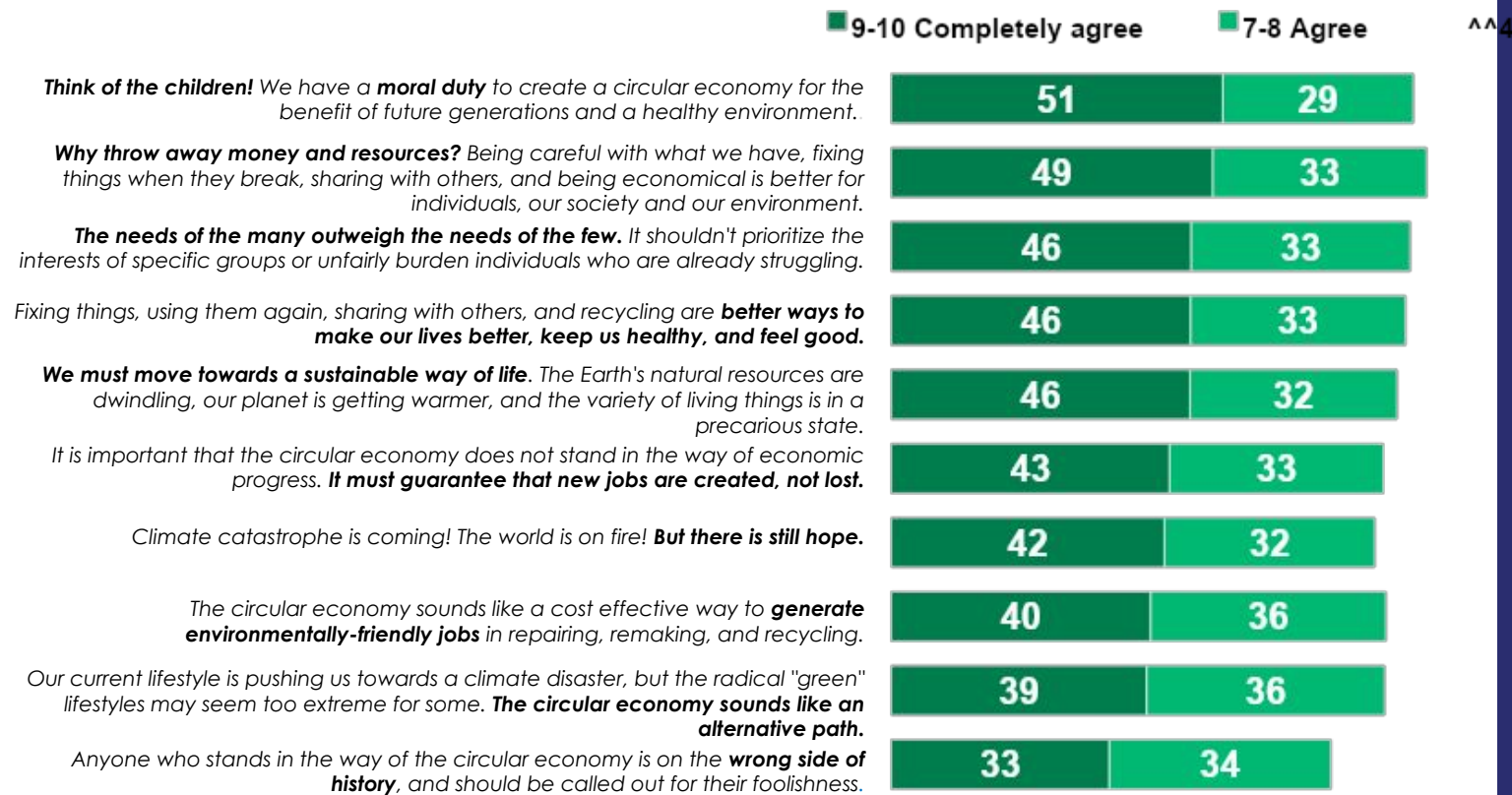
The circular economy sounds like a cost effective way to **generate environmentally-friendly jobs** in repairing, remaking, and recycling.

Our current lifestyle is pushing us towards a climate disaster, but the radical "green" lifestyles may seem too extreme for some. **The circular economy sounds like an alternative path**

Anyone who stands in the way of the circular economy is on the **wrong side of history**, and should be called out for their foolishness

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Circular Economy: Communication routes



In 2023, our moral duty towards future generations, and our responsibility to avoid waste & carefully manage resources appear the most compelling communication platforms for the Circular Economy.

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement. Please use a 10 point scale where 10 is Completely Agree and 1 is Completely Disagree. Base: All adults 16+ - 1,006

Circular Economy: Communication routes by demos

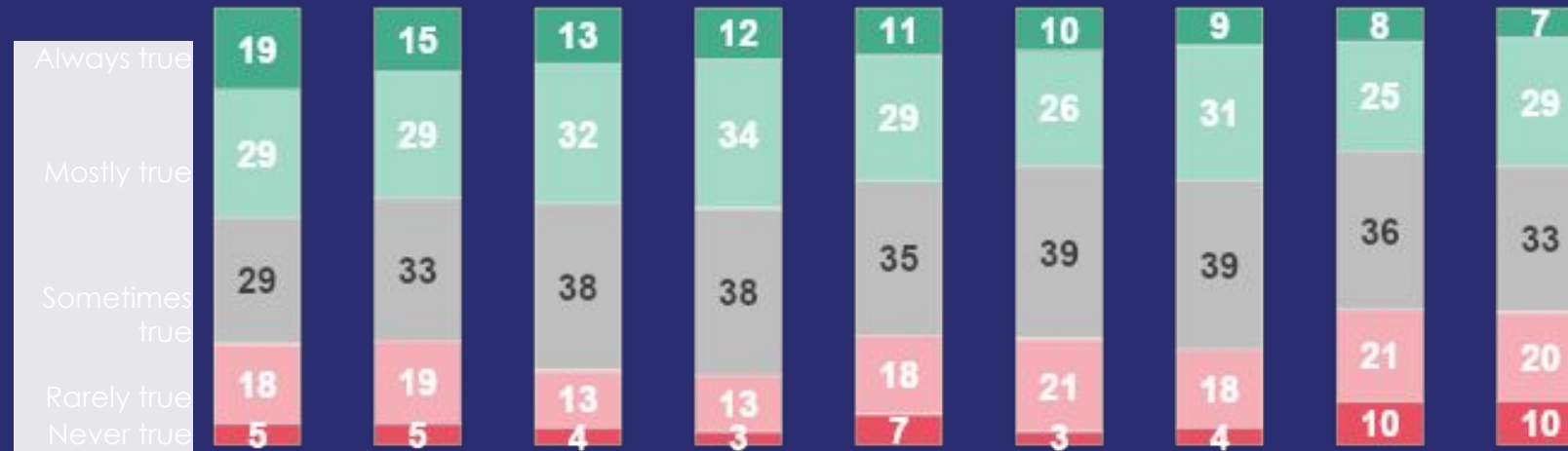
Strongly Agree	Total	Gender		Kids in HH		Age			Social Class		Region		Area	
		Male	Female	Yes	No	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1006	483	523	332	674	275	275	456	547	459	281	725	664	342
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Think of the children! We have a moral duty to create a circular economy for the benefit of future generations and a healthy environment.	51	49	52	55	48	45	53	53	56	46	52	50	55	43
Why throw away money and resources? Being careful with what we have, fixing things when they break, sharing with others, and being economical is better for individuals, our society and our environment.	49	50	48	51	48	44	53	50	54	44	46	51	49	49
The needs of the many outweigh the needs of the few. It shouldn't prioritize the interests of specific groups or unfairly burden individuals who are already struggling.	46	46	46	47	45	44	43	49	53	39	47	45	48	42
Fixing things, using them again, sharing with others, and recycling are better ways to make our lives better, keep us healthy, and feel good.	46	44	47	48	45	43	48	46	51	41	43	47	47	43
We must move towards a sustainable way of life. The Earth's natural resources are dwindling, our planet is getting warmer, and the variety of living things is in a precarious state.	46	44	47	51	43	41	48	47	52	39	47	45	50	38
It is important that the circular economy does not stand in the way of economic progress. It must guarantee that new jobs are created, not lost.	42	43	42	44	42	38	45	45	44	41	41	43	43	42
Climate catastrophe is coming! The world is on fire! But there is still hope.	42	40	44	46	40	41	41	43	47	37	46	40	46	34
The circular economy sounds like a cost effective way to generate environmentally-friendly jobs in repairing, remaking, and recycling.	40	39	40	42	38	38	38	42	45	34	39	40	42	35
Our current lifestyle is pushing us towards a climate disaster, but the radical "green" lifestyles may seem too extreme for some. The circular economy sounds like an alternative path.	39	36	42	41	38	37	38	41	43	35	39	39	41	34
Anyone who stands in the way of the circular economy is on the wrong side of history , and should be called out for their foolishness.	33	31	36	37	32	31	34	34	38	29	34	33	36	29

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement. Please use a 10 point scale where 10 is Completely Agree and 1 is Completely Disagree. Base: All adults 16+ - 1,006

Ethically Minded Consumer Behaviour

Ethically Minded Consumer Behaviour*

I do not buy products from companies that I know use sweatshop labor, child labor, or other poor working conditions.	I will not buy a product if I know that the company that sells it is socially irresponsible.	If I understand the potential damage to the environment that some products can cause, I do not purchase those products.	Whenever possible, I buy products packaged in reusable or recyclable containers.	I make every effort to buy paper products (toilet paper, tissues, etc.) made from recycled paper.	I do not buy household products that harm the environment.	When there is a choice, I always choose the product that contributes to the least amount of environmental damage.	I have switched products for environmental reasons.	I have paid more for environmentally friendly products when there is a cheaper alternative.
%	%	%	%	%	%	%	%	%



Always/Mostly true 2023 (%)	48	44	45	46	41	37	39	33	36
Always/Mostly true 2021 (%):	43	41	40	44	38	34	37	31	35

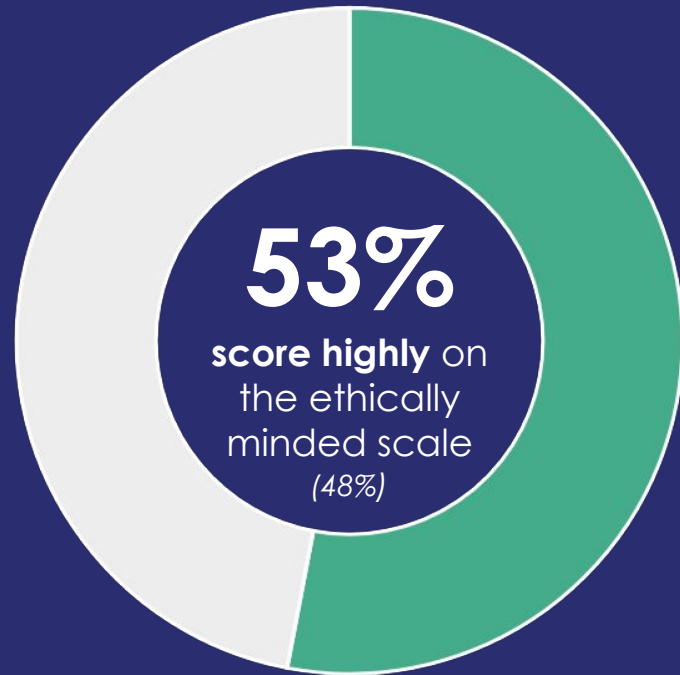
Stronger agreement in avoiding buying from unethical companies or products that can damage the environment.

Agreement is lower for deciding to pay more for environmentally friendly products.

*Source: Sudbury-Riley L, Kohlbacher F (2016) Ethically minded consumer behavior: scale review, development, and validation: *the scale conceptualises ethically minded consumer behavior as a variety of consumption choices pertaining to environmental issues, sustainability and corporate social responsibility*. Developed and extensively tested among consumers in the UK, Germany, Hungary, and Japan, the scale demonstrates reliability, validity, and metric measurement invariance across these diverse nations.

Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true. (Base: All adults 16+ - 1,006)

Ethically Minded Consumers



Est. pop of 1,858,000

	Highest Score	%	2021 %
Gender			
Male	49		50
Female	56		47
Age			
-34	45		42
35-49	57		53
50+	55		50
Kids in Household			
Yes	53		48
No	52		48
Social Class			
ABC1	58		55
C2DE	47		43
Region			
Dublin	63		56
Ex Dublin	48		45
Area			
Urban	59		53
Rural	41		40

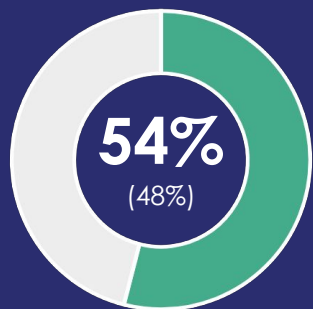
The incidence of those who score highest on the Ethically Minded Scale peaks in Dublin, Urban areas and among ABC1s.

()=2021

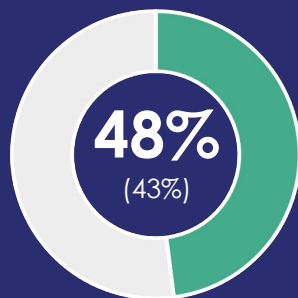
Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true. Base: All adults 16+ - 1,006

Circular Economy Behaviour

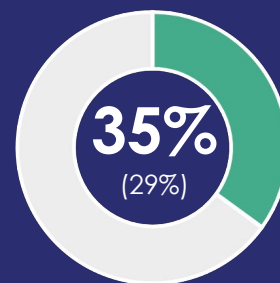
Whenever possible I **repair** household items that I have the skills to repair



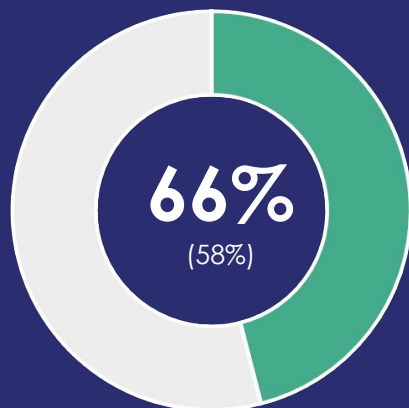
I have **lent** a product to a neighbour or friend for a short amount of time



When there is a choice, I pay to **access/rent** certain products rather than buy that product



ANY CIRCUALR ECONOMY BEHAVIOUR



2 in 3

adopt at least one Circular Economy Behaviour between repairing household items, lending or renting products

(of note, this national incidence of 2 in 3 adults shows no significant statistical variation).

()=2021. Scores Mostly/Always True.

Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true. Base: All adults 16+ - 1,006

Key Learnings

Circular Economy National Survey Key Learnings



41% of Irish adults have heard about the term 'Circular Economy'. Recall is biased towards ABC1 and Dubliners.



The vast majority believe supporting the Circular Economy will improve our society across a range of criteria, peaking for our health & well-being and quality of life.



The features of the Circular Economy are found interesting; but familiarity with them is modest (even among those who have heard the term 'Circular Economy').



The incidence of those who score highest on the Ethically Minded Scale peaks in Dublin, Urban areas and among ABC1s.



64% of Irish adults think 'moving to a Circular Economy is a good idea' – a significant increase from 2021.



66% adopt at least one Circular Economy behaviour between repairing household items, lending or renting products.



C. 70% of Irish adults think the Circular Economy should be a high priority for both the Irish government and Irish businesses; again showing an increase on 2021



In 2023, our moral duty towards future generations, and our responsibility to avoid waste and carefully manage resources appear the most compelling communication platforms for the Circular Economy.



Over 3 in 4 Irish adults would like to see the ideas of the Circular Economy applied to the plastic sector; over 60% would like them applied to either general products or the clothing/fashion sector.



Scientists are largely the most trusted source of information about the Circular Economy.



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Circular Economy National Survey 2023

CIRCULAR ECONOMY NATIONAL SURVEY 2024

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Job no. 24-068557-01

December 2024



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Circular Economy National Survey 2024



Circular Economy:
Understanding



Circular Economy: Familiarity &
Interest



Circular Economy: National
Approach



Ethically Minded Consumer
Behaviour



Key Learnings

Circular Economy National Survey

Research background and objectives

The purpose of this National Survey was to establish levels of awareness, understanding and appeal of concepts relating to the 'Circular Economy'.

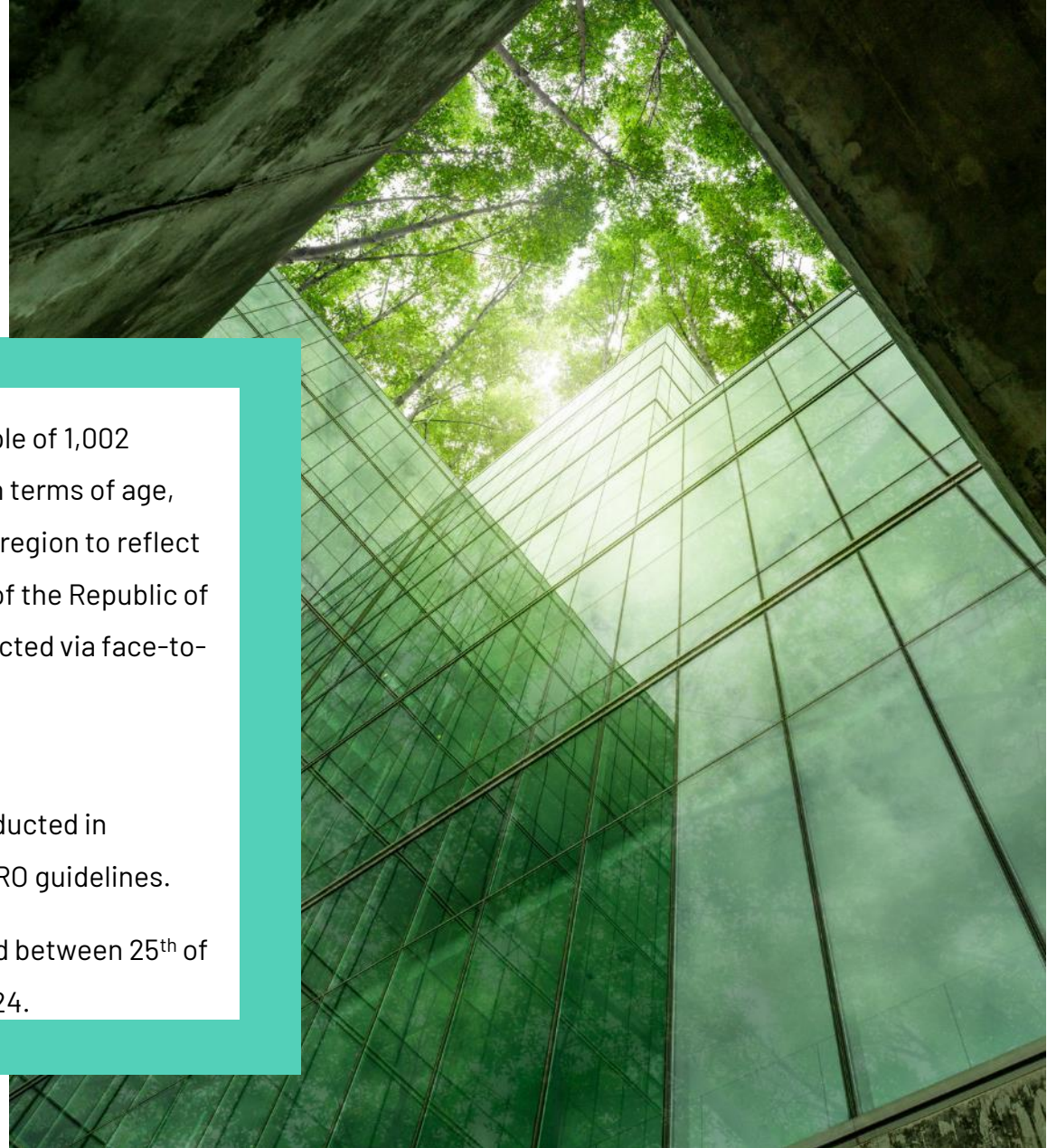
The survey approach allows us to assess how various demographic cohorts may vary in their engagement with the circular economy.

These results build on those from the Baseline National Surveys of 2021 and 2023.

Survey results are based on a sample of 1,002 adults aged 16+, quota controlled in terms of age, gender, socio-economic class and region to reflect the profile of the adult population of the Republic of Ireland. All interviewing was conducted via face-to-face interviewing on Ipsos B&A's National Barometer Survey.

All aspects of the survey were conducted in accordance with ESOMAR and AIMRO guidelines.

Survey interviewing was conducted between 25th of October to the 6th of November 2024.

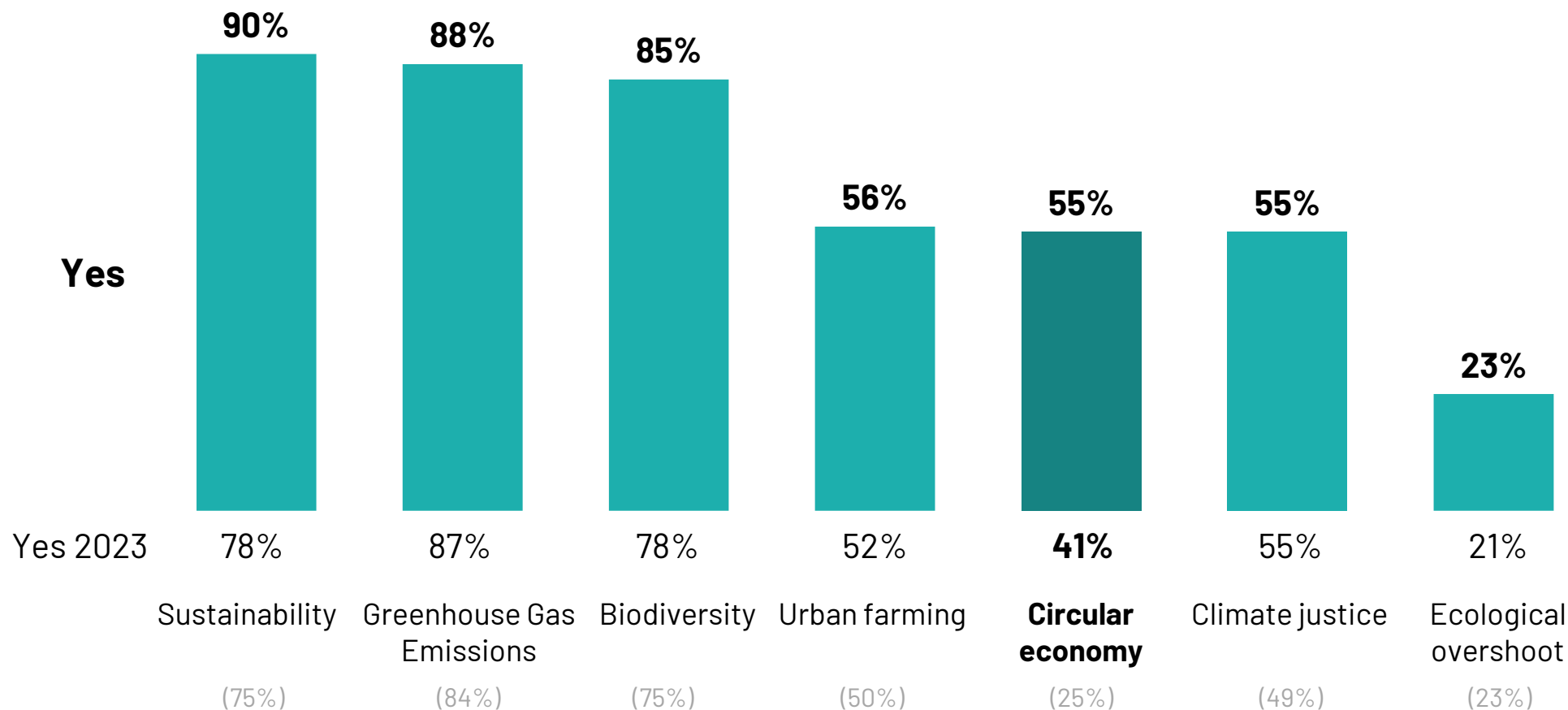


CIRCULAR ECONOMY: UNDERSTANDING



Environmental Terms: Name Recognition

Terms like sustainability, greenhouse gas emissions and biodiversity are the most familiar to the general public. The circular economy has increased in awareness by 14ppt since 2023 with to over half of the public now aware of the term.

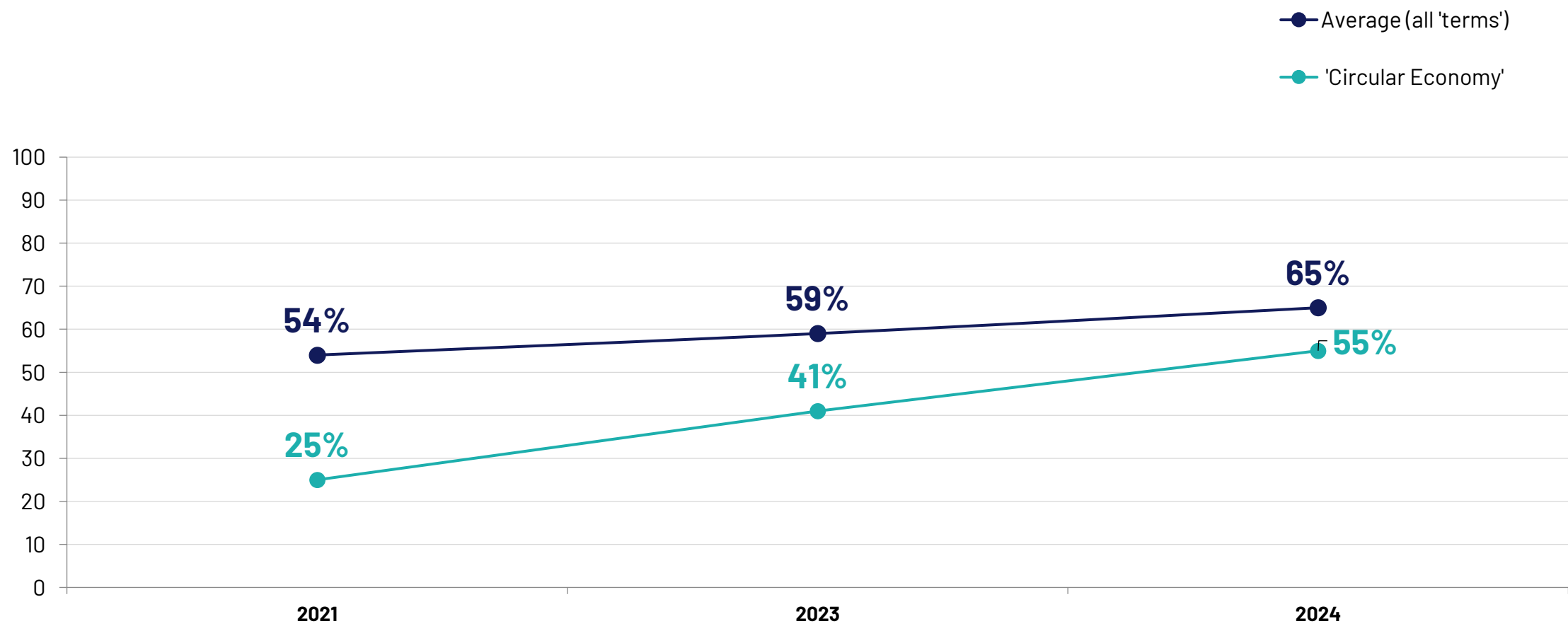


Q.1 Which of the following terms have you heard of?

Base: All respondents aged 16+ - 1,002

Environmental Terms: Name Recognition 2021-2024 Summary

The increase in the recognition of the term 'circular economy' since 2021 well exceeds the average rate of increase for the full set of environmental terms.

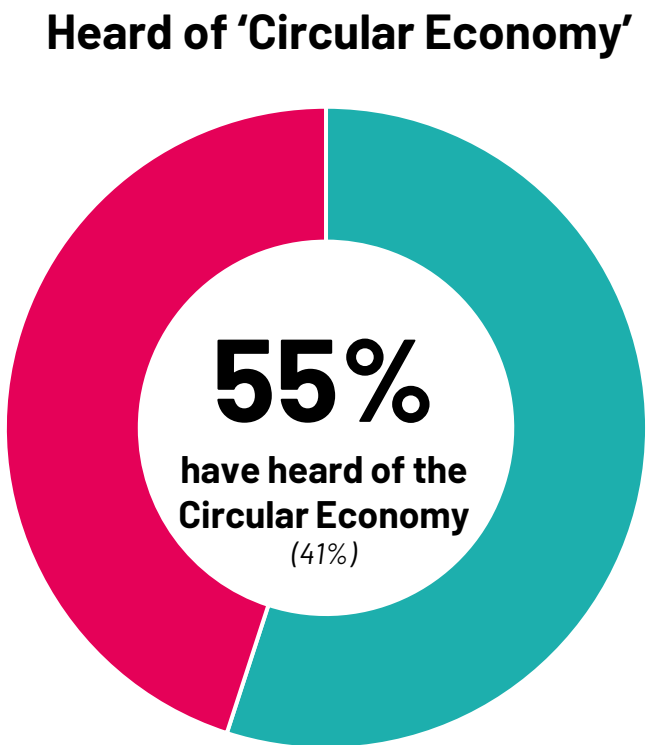


Q.1 Which of the following terms have you heard of?

Base: All respondents aged 16+ - 1,002

Circular Economy: Name Recognition

Over half of the general public have heard the term 'Circular Economy' this number peaks among Males and ABC1s.



Est. of population who have heard about
Circular Economy:
2,267,000

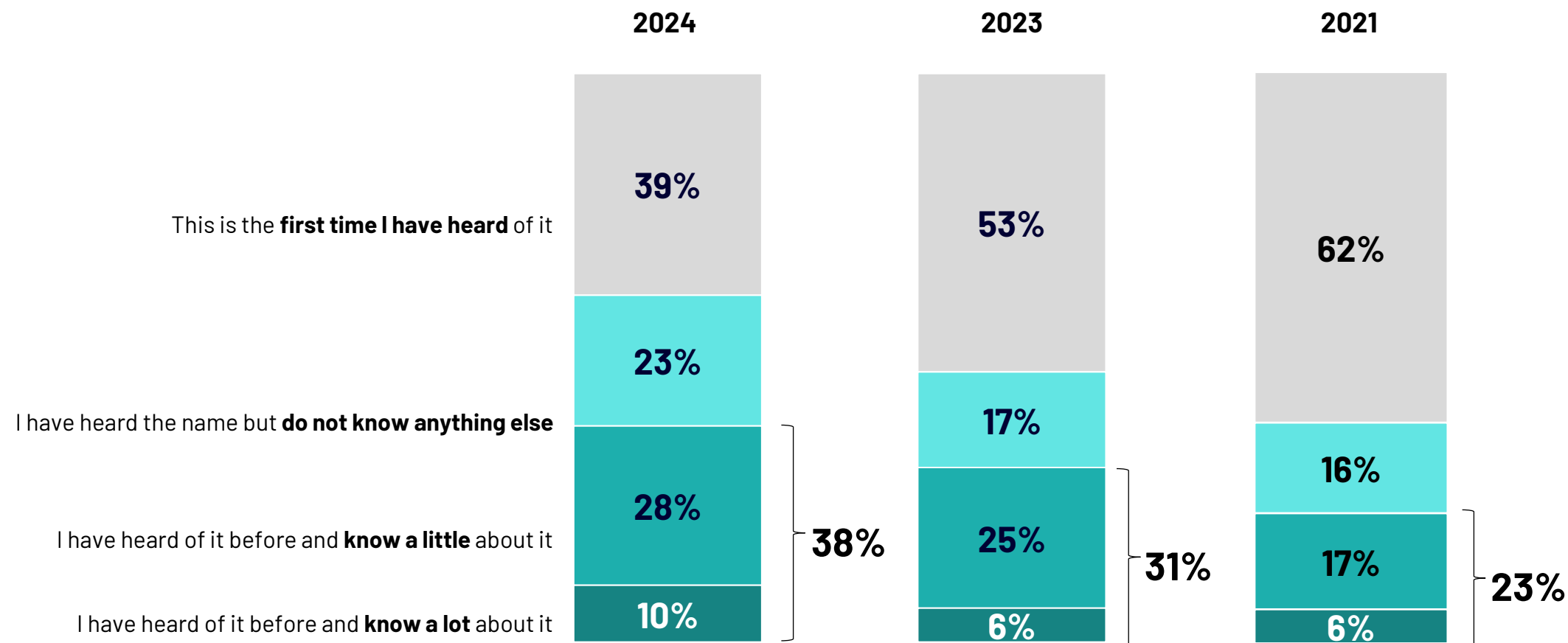
		2023	2021
Gender	Male	61%	46%
	Female	49%	36%
Age	-34	53%	41%
	35-49	58%	46%
	50+	54%	37%
Kids in Household	Yes	53%	42%
	No	56%	40%
Social Class	ABC1	66%	48%
	C2DE	46%	34%
Region	Dublin	59%	49%
	Ex-Dublin	53%	37%
Area	Urban	56%	44%
	Rural	52%	34%

Q.1 Which of the following terms have you heard of?

Base: All respondents aged 16+ - 1,002

Circular Economy: Public Familiarity

Although a large amount of the public heard the term for the first time during the survey, a similar percentage of the public know at least something about it. This figure has increased 7ppt since last year.

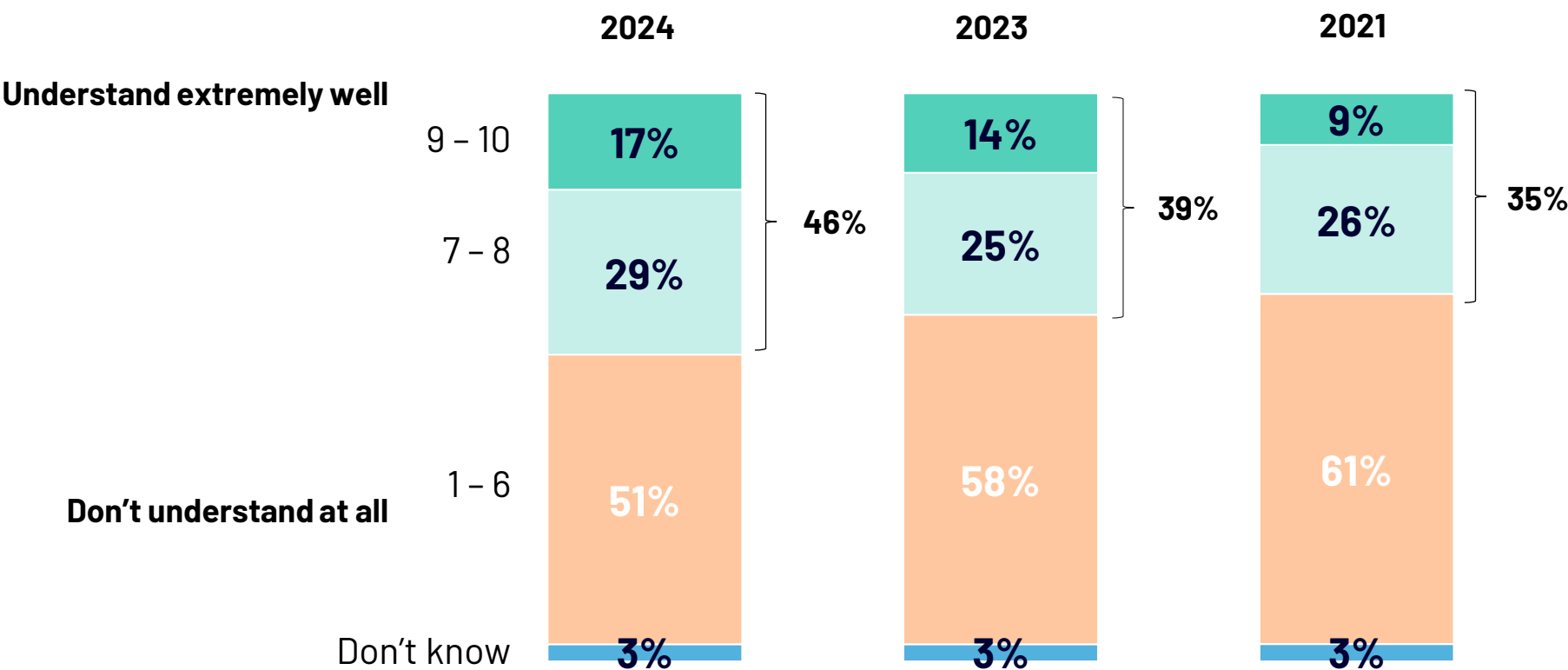


Q.2 Before today how familiar were you with the meaning of the term Circular Economy?
Base: All respondents aged 16+ – 1,002

Explanation included in the survey:
'A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.'

Circular Economy: Prompted Understanding

The percentage of people who understand on prompting the idea of the circular economy has increased by 7ppt in 2024: 46% of adults now say they understand the idea 'well'.



Q.3 To what extent do you now feel you understand the idea of a Circular Economy?

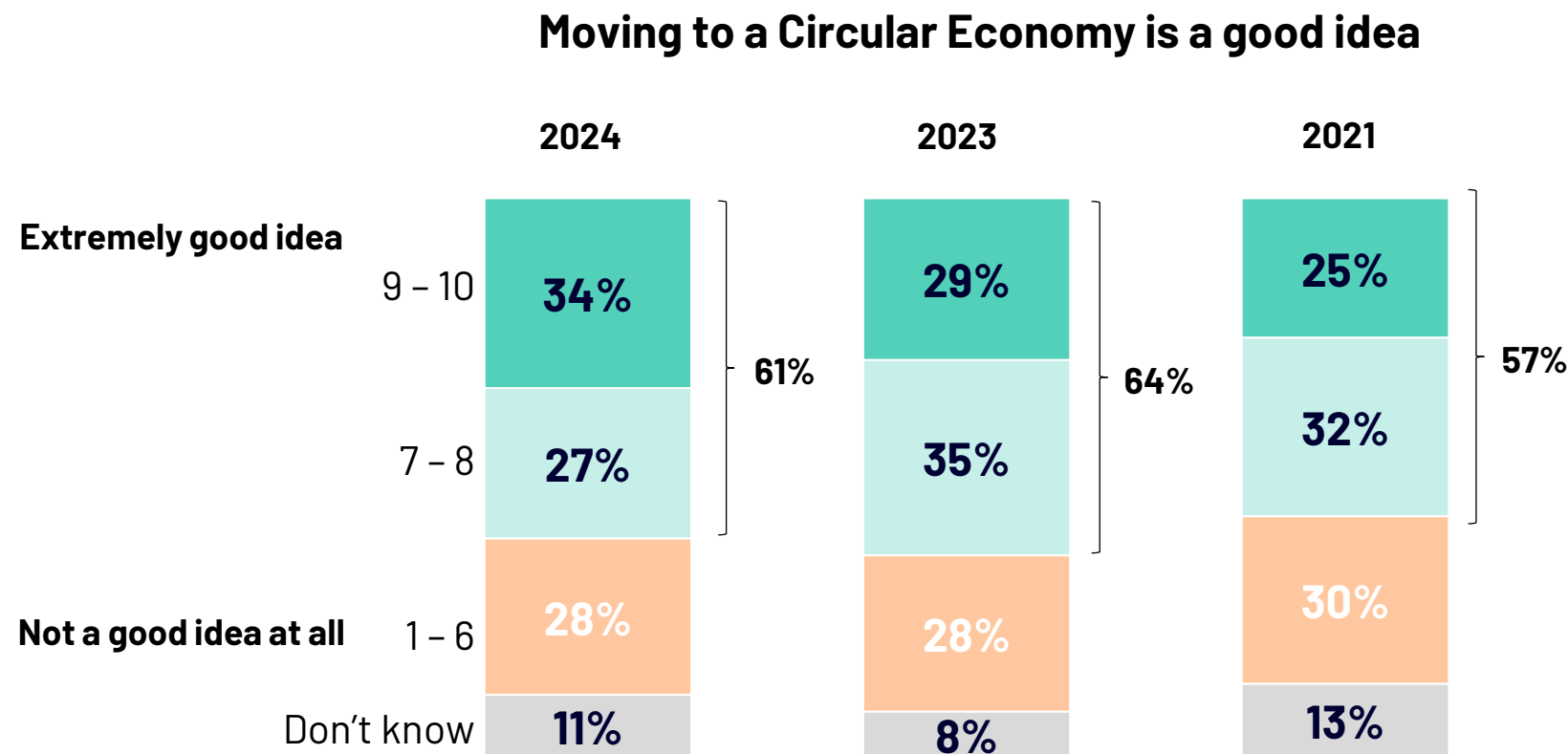
Base: All respondents aged 16+ - 1,002

Explanation included in the survey:

'A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.'

Circular Economy: Overall Support

61% believe that moving to a Circular Economy is a good idea, which is a 3 ppt decrease since 2023. This decrease is reflected in the rise of those who 'don't know' if it is a good idea.



Q.4 To what extent do you think moving to a Circular economy is a good idea?

Base: All respondents aged 16+ - 1,002

Circular Economy: Understanding Summary

Public Familiarity, Understanding and Pro moving to a Circular Economy are all significantly higher among ABC1s. Public familiarity is also significantly higher among males and those living in Dublin.

	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1002	481	521	243	286	473	576	398	276	726	660	342
Public Familiarity	38%	44%	32%	35%	37%	41%	50%	27%	47%	34%	39%	35%
Understanding (7-10)	46%	47%	45%	50%	43%	44%	53%	38%	43%	47%	43%	51%
Good idea (7-10)	61%	61%	60%	60%	62%	60%	66%	54%	63%	60%	57%	68%

Q.2 Before today how familiar were you with the meaning of the term Circular Economy?
Q.3 To what extent do you now feel you understand the idea of a Circular Economy?
Q.4 To what extent do you think moving to a Circular economy is a good idea?
Base: All respondents aged 16+ - 1,002

Significantly higher than total
Significantly lower than total



CIRCULAR ECONOMY: FAMILIARITY & INTEREST

Circular Economy: Detailed Familiarity & Interest

The following statements were rated on familiarity and interest by respondents.

Involves **businesses reducing the quantity of waste** they generate and the amount of harmful substances their waste contains

Requires businesses **offering people new ways to access products such as renting, leasing and purchasing second hand.**

Organisations and people together **changing the way they make, purchase and use products** to develop a climate friendly and strong economy.

Involves designing products so their **lifetime and usability is extended.**

Reduces/prevents **packaging waste**

Involves **people** changing the way they access and use products by emphasising **renting, sharing, repairing, and reusing.**

Requires organizations to **examine where their supplies come from** and minimise the journey they take around the world

Can **take shape across many scales**, from small household items to the architecture of entire buildings

Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved?

Base: Prior Awareness Circular Economy - 695

Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?

Base: All respondents aged 16+ - 1,002

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Circular Economy: Detailed Familiarity

Familiarity is highest for packaging waste prevention, followed by product design, change in access and use of products, and business waste reduction. Levels of detailed familiarity are largely consistent with 2023 (despite the rise in name recognition and general understanding).

	9-10 Extremely Familiar	7-8 Familiar	Summary 7-10		
			2024	2023	2021
Reduces/prevents packaging waste	40%	29%	69%	70%	61%
Involves designing products so their lifetime and usability is extended	32%	29%	61%	58%	50%
Involves people changing the way they access and use products by emphasising renting, sharing, repairing, and reusing	31%	27%	58%	59%	50%
Involves businesses reducing the quantity of waste they generate and the amount of harmful substances their waste contains	29%	29%	58%	58%	53%
Requires organisations to examine where their supplies come from and minimise the journey they take around the world	27%	26%	53%	55%	-
Can take shape across many scales , from small household items to the architecture of entire buildings	27%	26%	53%	54%	47%
Requires businesses offering people new ways to access products such as renting, leasing and purchasing second hand	25%	27%	52%	54%	46%
Organisations and people together changing the way they make, purchase and use products to develop a climate friendly and strong economy.	25%	27%	52%	55%	50%

Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved?

Base: Prior Awareness Circular Economy - 695

Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results

Circular Economy: Detailed Interest

Interest in the Circular Economy features is quite high among the general public. Reduction and prevention of waste and product design are considered the most interesting features. Again, levels of interest are consistent for 2023.

	9-10 Extremely Familiar	7-8 Familiar	Summary 7-10	
			2024	2023
Reduces/prevents packaging waste	51%	27%	78%	77%
Involves designing products so their lifetime and usability is extended.	46%	27%	73%	75%
Involves businesses reducing the quantity of waste they generate and the amount of harmful substances their waste contains	39%	32%	71%	72%
Organisations and people together changing the way they make, purchase and use products to develop a climate friendly and strong economy.	38%	29%	67%	69%
Involves people changing the way they access and use products by emphasising renting, sharing, repairing, and reusing.	38%	31%	69%	71%
Requires organisations to examine where their supplies come from and minimise the journey they take around the world	38%	29%	67%	67%
Requires businesses offering people new ways to access products such as renting, leasing and purchasing second hand.	36%	30%	66%	67%
Can take shape across many scales , from small household items to the architecture of entire buildings	34%	31%	65%	63%

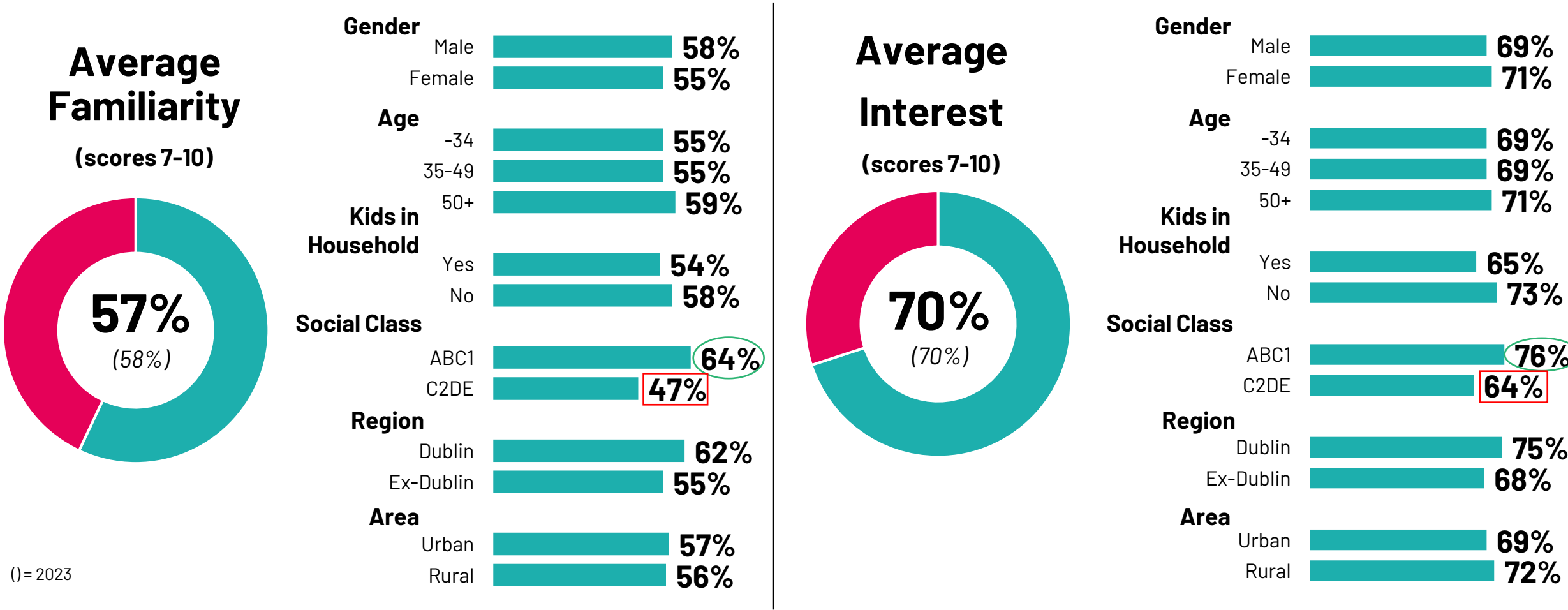
Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?

Base: All respondents aged 16+ - 1,002

Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results

Circular Economy: Average Familiarity and Interest across Demos

While Familiarity and interest peak among ABC1, The difference in detailed familiarity by social grade is not as wide as it was for the overall measures on 'Understanding'. Average familiarity and interest are both consistent with last year's figures.



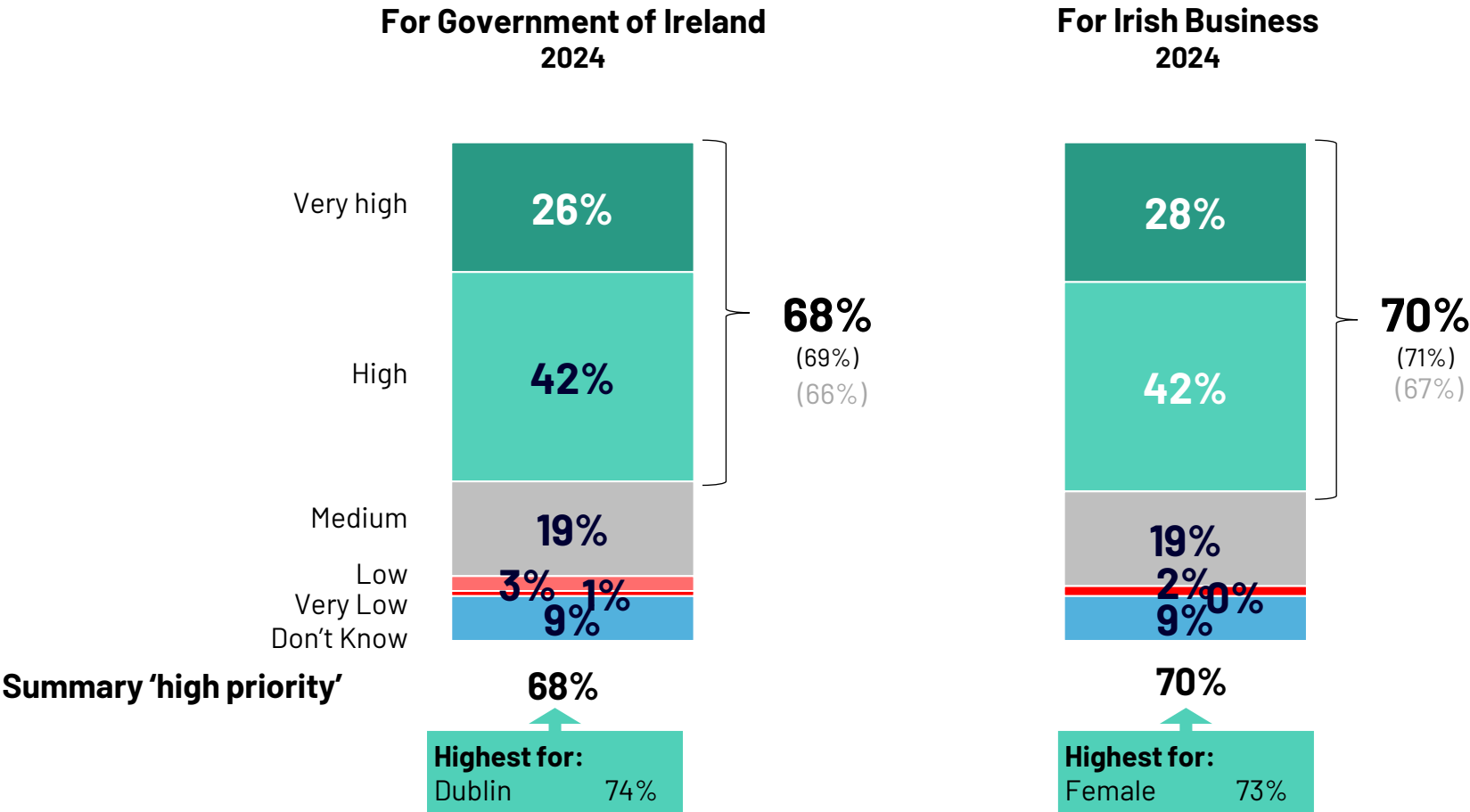
Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved?
Base: Prior Awareness Circular Economy - 695
Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?
Base: All respondents aged 16+ - 1,002

 Significantly higher than total
 Significantly lower than total

CIRCULAR ECONOMY: NATIONAL APPROACH

Circular Economy: Should it Be a Priority?

The proportion who feel the circular economy should be a priority for either the government of Ireland or Irish businesses is very similar at or about 7 in 10 adults; support as a government priority peaks in Dublin.



Q.7a Do you think the Circular Economy should be a high, medium, or low priority for the Government of Ireland?

Q.7b Do you think the Circular Economy should be a high, medium, or low priority for Irish businesses?

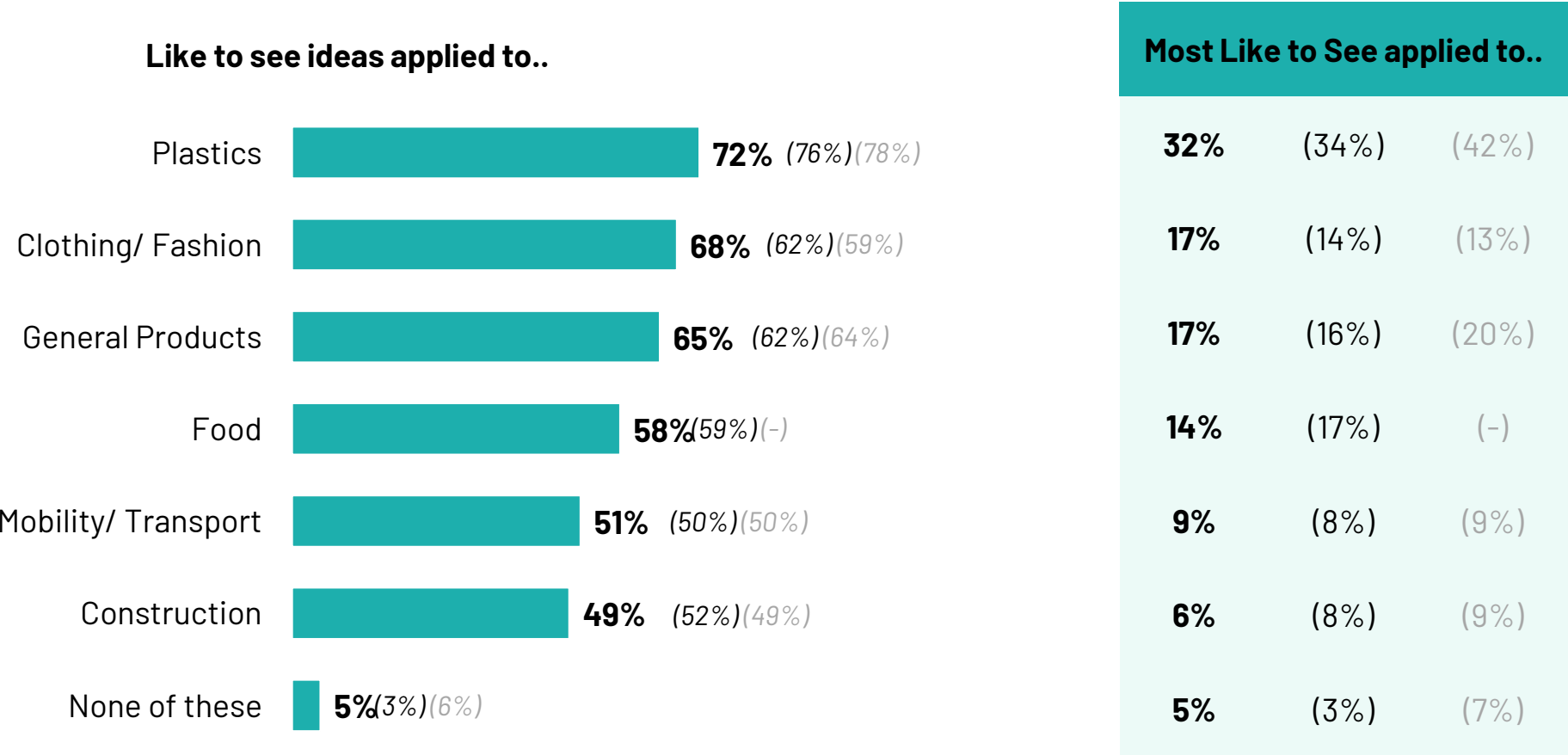
Base: All respondents aged 16+ - 1,002

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() = 2023
() = 2021

Circular Economy: Application to economic sectors

A large majority would like to see ideas of the Circular Economy applied to Plastics, followed by Clothing and General Products. Desire to see circular economy ideas applied to clothing and fashion has increased by 6ppts.

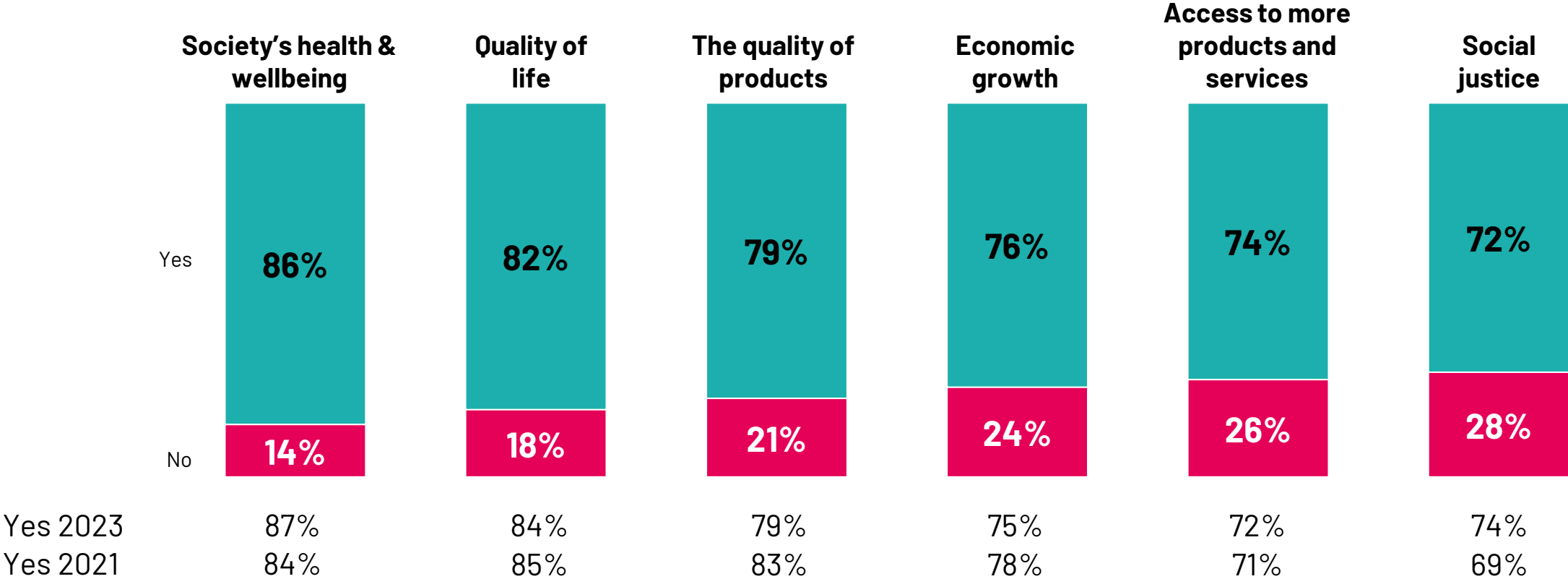


Q.8a Which, if any, of the following sectors would you like to see the ideas of the Circular Economy applied to?
Q.8b Which, if any, of the following sectors would you most like to see the ideas of the Circular Economy applied to?
Base: All respondents aged 16+ - 1,002

Circular Economy: Its Benefits

In relation to where a circular economy will benefit our lives, we typically believe it will do so across a range of criteria; peaking for health & well-being and quality of life; near 8 in 10 think it will improve the quality of products. This data is largely in line with 2023.

Will improve...?

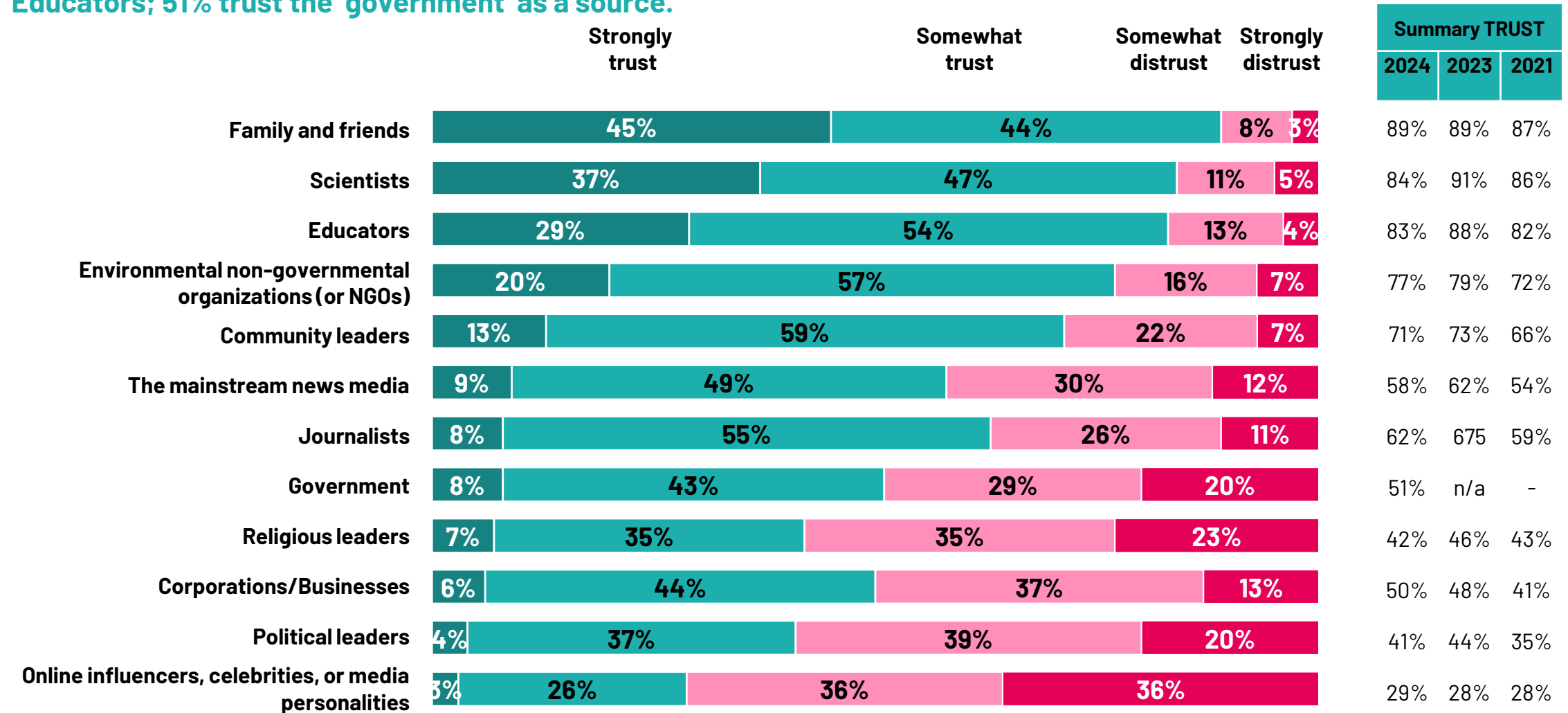


Q.9 Overall, do you think that taking action to support a Circular Economy will improve or not each of the following?

Base: All respondents aged 16+ - 1,002

Circular Economy: Trusted Sources of Info

Our most trusted sources of information about the Circular Economy continue to be Family & Friends, Scientists and Educators; 51% trust the 'government' as a source.



Q.10 How much do you trust or distrust the following as a source of information about the Circular Economy?

Base: All respondents aged 16+ - 1,002

Circular Economy: Communication routes

Respondents rated the following communication related statements on the extent to which they agreed with them.

	Think of the children! We have a moral duty to create a circular economy for the benefit of future generations and a healthy environment. Being responsible with resources is essential and the right thing to do.	Why throw away money and resources? Being careful with what we have, fixing things when they break, sharing with others, and being economical is better for individuals, our society and our environment.	The needs of the many outweigh the needs of the few. The move towards a circular economy should be transparent, socially equitable, unbiased, and just. It shouldn't prioritize the interests of specific groups or unfairly burden individuals who are already struggling.	A better future awaits. Fixing things, using them again, sharing with others, and recycling are better ways to make our lives better, keep us healthy, and feel good. Additionally, these actions help reduce the negative impact we have on the environment.	We must move towards a sustainable way of life. The Earth's natural resources are dwindling, our planet is getting warmer, and the variety of living things is in a precarious state. To address these sustainability concerns, we must shift towards a circular economy.
	It is important that the circular economy does not stand in the way of economic progress. It must guarantee that new jobs are created, not lost.	URGENT! Climate catastrophe is coming! The world is on fire! But there is still hope. We must do everything we can to prevent environmental collapse and catastrophic global heating, including lowering emissions by adopting a circular economy.	Another way is possible! Our current lifestyle is pushing us towards a climate disaster, but the radical "green" lifestyles may seem too extreme for some. The circular economy sounds like an alternative path that can help us to broadly uphold our way of life while also avoiding a climate catastrophe.	If opportunity doesn't knock, build a door. The circular economy sounds like a cost-effective way to generate environmentally-friendly jobs in repairing, remaking, and recycling. It also creates business prospects and increases economic growth.	The circular economy is the best and most strategic way forward. Anyone who stands in the way of the circular economy is on the wrong side of history, and should be called out for their foolishness.

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,002

Circular Economy: Communication routes

In 2024, moral duty, thrift/ self reliance and a just transition appear the most compelling communication platforms for the Circular Economy.

	Any 9-10	Any 7-8	Summary 7-10	
			2024	2023
Think of the children! We have a moral duty to create a circular economy for the benefit of future generations and a healthy environment. Being responsible with resources is essential and the right thing to do.	50%	29%	79%	80%
Why throw away money and resources? Being careful with what we have, fixing things when they break, sharing with others, and being economical is better for individuals, our society and our environment.	48%	30%	78%	82%
The needs of the many outweigh the needs of the few. The move towards a circular economy should be transparent, socially equitable, unbiased, and just. It shouldn't prioritize the interests of specific groups or unfairly burden individuals who are already struggling.	48%	30%	78%	79%
A better future awaits. Fixing things, using them again, sharing with others, and recycling are better ways to make our lives better, keep us healthy, and feel good. Additionally, these actions help reduce the negative impact we have on the environment.	47%	31%	78%	79%
We must move towards a sustainable way of life. The Earth's natural resources are dwindling, our planet is getting warmer, and the variety of living things is in a precarious state. To address these sustainability concerns, we must shift towards a circular economy.	47%	29%	76%	78%
It is important that the circular economy does not stand in the way of economic progress. It must guarantee that new jobs are created, not lost.	44%	29%	73%	75%
URGENT! Climate catastrophe is coming! The world is on fire! But there is still hope. We must do everything we can to prevent environmental collapse and catastrophic global heating, including lowering emissions by adopting a circular economy.	43%	28%	71%	74%
Another way is possible! Our current lifestyle is pushing us towards a climate disaster, but the radical "green" lifestyles may seem too extreme for some. The circular economy sounds like an alternative path that can help us to broadly uphold our way of life while also avoiding a climate catastrophe.	42%	32%	74%	75%
If opportunity doesn't knock, build a door. The circular economy sounds like a cost effective way to generate environmentally-friendly jobs in repairing, remaking, and recycling. It also creates business prospects and increases economic growth.	38%	34%	72%	76%
The circular economy is the best and most strategic way forward. Anyone who stands in the way of the circular economy is on the wrong side of history , and should be called out for their foolishness.	34%	29%	63%	67%

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,002

Circular Economy: Communication routes by demos

Those living in rural areas are significantly more likely to agree with the top three communication routes,.

Strongly Agree 9-10	Total	Gender		Kids in HH		Age			Social Class		Region		Area	
		Male	Female	Yes	No	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1002	481	521	331	671	243	286	473	576	398	276	726	660	342
Think of the children! We have a moral duty to create a circular economy for the benefit of future generations and a healthy environment. Being responsible with resources is essential and the right thing to do.	50%	46%	55%	49%	51%	44%	52%	54%	53%	48%	46%	52%	46%	58%
Why throw away money and resources? Being careful with what we have, fixing things when they break, sharing with others, and being economical is better for individuals, our society and our environment.	48%	45%	51%	42%	52%	44%	47%	52%	49%	46%	41%	51%	44%	56%
The needs of the many outweigh the needs of the few. The move towards a circular economy should be transparent, socially equitable, unbiased, and just. It shouldn't prioritize the interests of specific groups or unfairly burden individuals who are already struggling.	48%	45%	50%	44%	50%	46%	46%	50%	52%	43%	45%	49%	45%	54%
A better future awaits. Fixing things, using them again, sharing with others, and recycling are better ways to make our lives better, keep us healthy, and feel good. Additionally, these actions help reduce the negative impact we have on the environment.	47%	45%	50%	45%	49%	43%	48%	50%	52%	43%	45%	48%	45%	52%
We must move towards a sustainable way of life. The Earth's natural resources are dwindling, our planet is getting warmer, and the variety of living things is in a precarious state. To address these sustainability concerns, we must shift towards a circular economy.	47%	43%	51%	42%	50%	43%	46%	51%	51%	43%	45%	48%	45%	52%
It is important that the circular economy does not stand in the way of economic progress. It must guarantee that new jobs are created, not lost.	44%	42%	46%	40%	46%	39%	45%	47%	44%	42%	37%	47%	39%	54%
URGENT! Climate catastrophe is coming! The world is on fire! But there is still hope. We must do everything we can to prevent environmental collapse and catastrophic global heating, including lowering emissions by adopting a circular economy.	43%	40%	46%	42%	44%	41%	40%	47%	46%	40%	43%	43%	41%	46%
Another way is possible! Our current lifestyle is pushing us towards a climate disaster, but the radical "green" lifestyles may seem too extreme for some. The circular economy sounds like an alternative path that can help us to broadly uphold our way of life while also avoiding a climate catastrophe.	42%	37%	46%	42%	41%	39%	41%	43%	44%	39%	40%	42%	39%	46%
If opportunity doesn't knock, build a door. The circular economy sounds like a cost effective way to generate environmentally-friendly jobs in repairing, remaking, and recycling. It also creates business prospects and increases economic growth.	38%	35%	40%	34%	40%	39%	36%	37%	42%	32%	29%	41%	34%	46%
The circular economy is the best and most strategic way forward. Anyone who stands in the way of the circular economy is on the wrong side of history , and should be called out for their foolishness.	34%	27%	39%	32%	34%	31%	32%	36%	37%	29%	29%	35%	32%	36%

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,002

Significantly higher than total

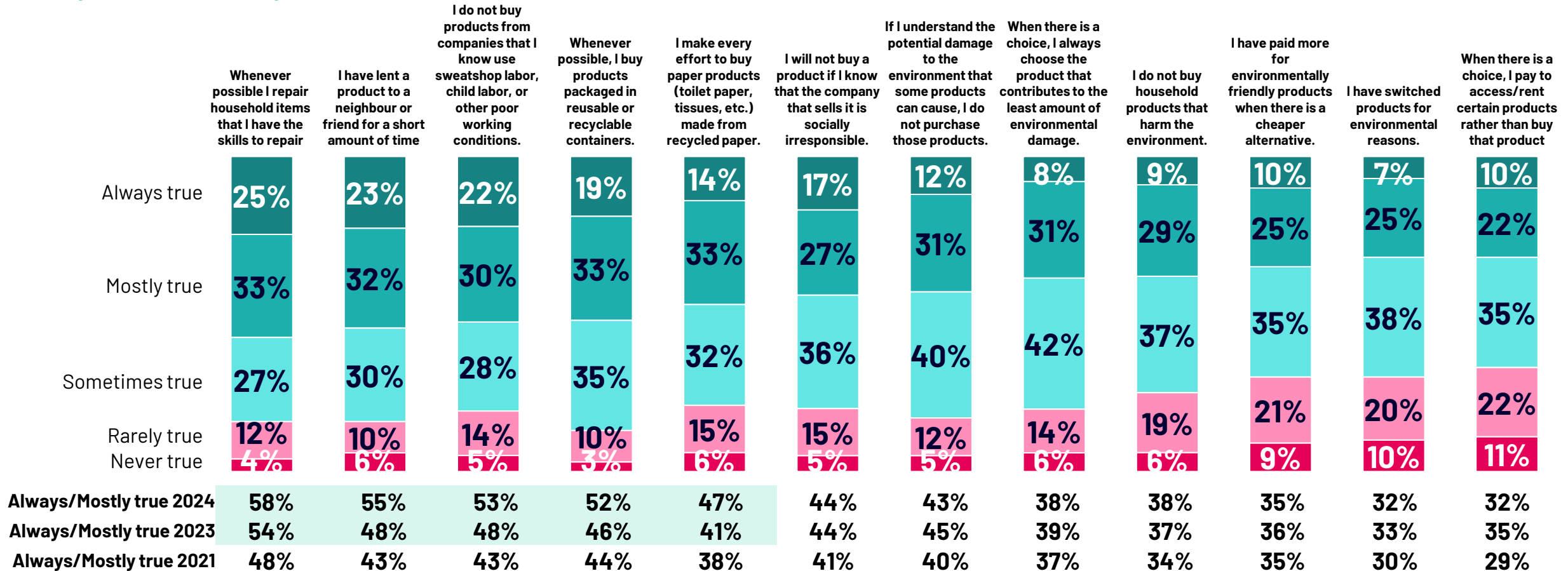
Significantly lower than total

ETHICALLY MINDED CONSUMER BEHAVIOUR



Ethically Minded Consumer Behaviour

Repairing household items and lending products to neighbours and friends are the most engaged with behaviours. Last year's two most engaged with behaviours of only buying ethically and purchasing products in reusable and recyclable containers have both notably increased this year



Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.

Base: All respondents aged 16+ - 1,002

Ethically Minded Consumers

Taking a closer look at the aggregate scores across demographics, those 50 years + and ABC1s post the highest totals.



Est. pop of 2,171,000

Ethically Minded		2023	2021
Gender	Male	51%	49%
	Female	54%	56%
Age	-34	44%	45%
	35-49	53%	57%
	50+	59%	55%
Kids in Household	Yes	51%	53%
	No	54%	52%
Social Class	ABC1	59%	58%
	C2DE	48%	47%
Region	Dublin	51%	63%
	Ex Dublin	53%	48%
Area	Urban	52%	59%
	Rural	55%	41%

Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.

Base: All respondents aged 16+ - 1,002

()=2023

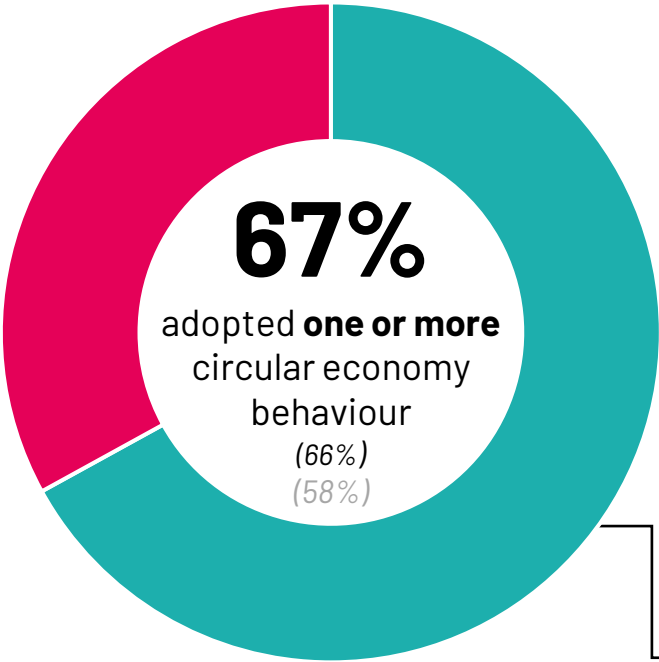
(2021)

○	Significantly higher than total
○	Significantly lower than total

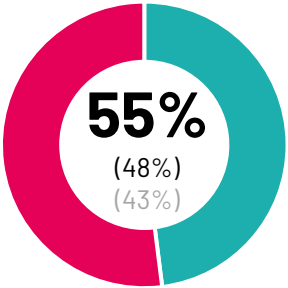
Circular Economy Behaviour

2 in 3 adopt at least one Circular Economy Behaviour, notable increases on last year include the 7ppts increase in those who loaned a product to a neighbour or friend.

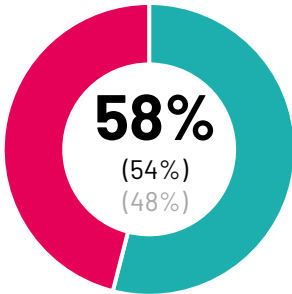
ANY CIRCULAR ECONOMY BEHAVIOUR



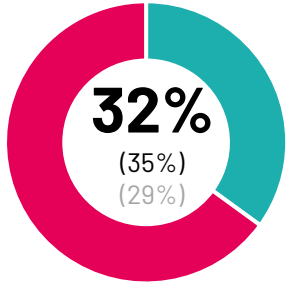
I have **lent** a product to a neighbour or friend for a short amount of time



Whenever possible I **repair** household items that I have the skills to repair



When there is a choice, I pay to **access/rent** certain products rather than buy that product



Significantly Low U34 – 59%; Dublin 60%
Slightly High 79% Conn/Ulster; 74% Rural; 76% Empty nester

Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.

Base: All respondents aged 16+ - 1,002

KEY LEARNINGS

Circular Economy National Survey: Summary

There have been significant year on year rises in relation to name recognition, broad familiarity and overall understanding; levels of support, desired prioritisation and detailed interest are more stable year on year.

	Circular Economy		
	2024	2023	2021
	%	%	%
'Heard of circular economy'	55	41	25
Know a little/ know a lot	38	31	23
Understand well (score 7-10)	46	39	35
Overall support (score 7-10)	61	64	57
Average familiarity (7-10)	57	58	50
Average Interest (7-10)	70	70	58
Priority for Government (high/ very high)	68	69	66
Priority for Irish Business (high/ very high)	70	71	67

Circular Economy National Survey Key Learnings

1

55% of Irish adults have heard about the term 'Circular Economy', a notable increase from last year 14ppts. Recall is especially high among ABC1 and Males.

2

The features of the Circular Economy are found interesting; but familiarity with them is modest. This gap between familiarity and interest was also observed last year.

3

61% believe that moving to the circular economy is a good idea, a marginal reduction on last year (-3ppts)

4

C. 70% of Irish adults think the Circular Economy should be a high priority for both the Irish government and Irish businesses. These figures are consistent with last year's.

5

Key areas that the Irish public would like to see ideas of the circular economy applied to are the plastic, fashion and general products.

Circular Economy National Survey Key Learnings

6

The vast majority believe supporting the Circular Economy will improve our society across a range of criteria, peaking for our health & well-being and quality of life.

7

The Ethically Minded Scale is similar to last year with scores peaking among those over 50 years and those in Dublin.

8

67% are active in at least one Circular Economy behaviour between repairing household items, lending or renting products.

9

In 2024, moral duty, thrift/ self reliance and a just transition appear the most compelling communication platforms for the Circular Economy.

10

Our most trusted sources of information about the Circular Economy continue to be Family & Friends, Scientists and Educators; 51% trust the 'government' as a source.

THANK YOU



Ipsos B&A



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CIRCULAR ECONOMY NATIONAL SURVEY 2026

John O'Mahony, Director

Cormac Gunning, Research Executive

April 2026



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Circular Economy National Survey 2026



**Circular Economy:
Understanding**



**Circular Economy: Familiarity &
Interest**



**Circular Economy:
Support**



**Circular Economy: National
Approach**



Key Learnings

Circular Economy National Survey

Research background and objectives

The purpose of this National Survey was to establish levels of awareness, understanding and appeal of concepts relating to the 'Circular Economy'.

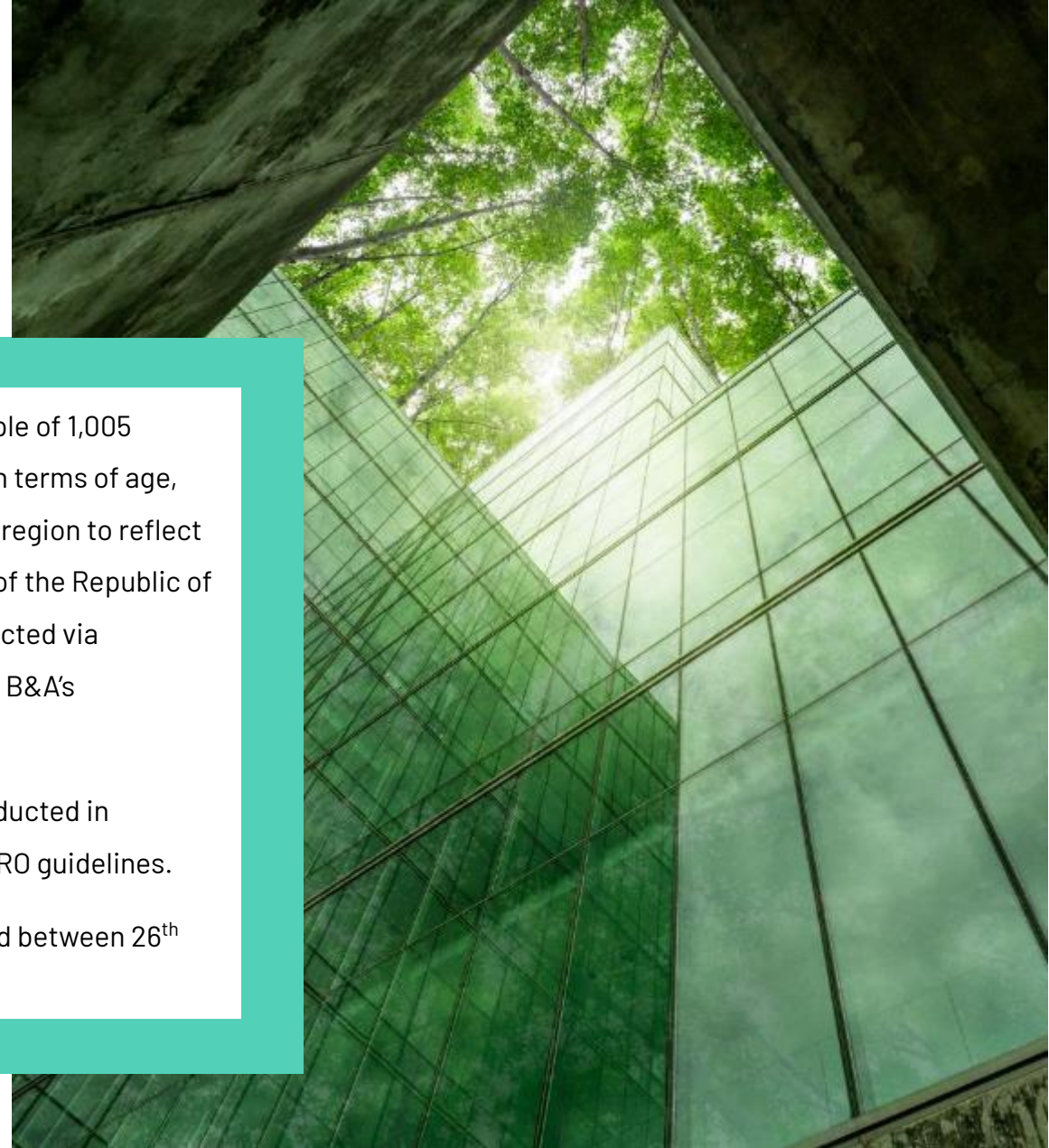
The survey approach allows us to assess how various demographic cohorts may vary in their engagement with the circular economy.

These results build on those from the Baseline National Surveys of 2021, 2023 & 2024.

Survey results are based on a sample of 1,005 adults aged 16+, quota controlled in terms of age, gender, socio-economic class and region to reflect the profile of the adult population of the Republic of Ireland. All interviewing was conducted via face-to-face interviewing on Ipsos B&A's National Barometer Survey.

All aspects of the survey were conducted in accordance with ESOMAR and AIMRO guidelines.

Survey interviewing was conducted between 26th March to the 9th April.





CONTEXT: GLOBAL AND NATIONAL

Global Context

The decline in Irish interest is not an isolated issue, but a local reflection of a well-documented global trend: public exhaustion with climate action is setting in.

Source: Ipsos Global Report, "People and Climate Change", April 2026

A Global Decline in Individual Responsibility

A feeling of **"collective exhaustion"** is evident worldwide. The sense of personal duty to act on climate change has fallen across the board, showing that the fatigue seen in Ireland is part of a much larger pattern.

In **100%** of countries tracked since 2021, the belief that individuals have a personal responsibility to act on climate has **declined**.

Expectations are Shifting to Institutions

As individual motivation wanes, citizens are increasingly **looking to governments and businesses** to lead. The public expects them to take on the primary responsibility for driving change.

57% of people globally believe businesses are failing their customers and employees if they don't act now on climate change.

Effective Communication Must be Personal and Immediate

To re-engage a fatigued public, messaging must shift from abstract environmental goals to tangible, personal benefits. The most effective language is what the report calls **"me now, not we later."**

Reframing claims to focus on immediate human benefits increases purchase motivation by up to **71%**.

This global context reveals a fundamental shift in the public engagement challenge, moving from a need to build awareness to a need to overcome apathy. The Centre's work now sits at the intersection of two powerful global forces: a public that is simultaneously demanding more institutional leadership while also retreating into more immediate, personal concerns.

National Context

The global 'interest fatigue' is amplified in Ireland by a unique cultural mood of 'Resigned Resilience,' where people are emotionally tuning out of large-scale crises to protect their own wellbeing.

Source: Ipsos B&A, "Sign of the Times", March 2026

We Have "Run Out of Shock"

The Irish public has moved from crisis-mode to a state of **"Resigned Resilience."** Constant exposure to negative headlines has led to "Outrage Fatigue," where people are emotionally checking out and meeting major news with a 'sigh' rather than engagement.

The Response is "Joy is Medicine"

To cope, people are rationing their emotional energy and retreating to what they can control. They are actively seeking **"lightness"** and finding sanctuary in tangible, small-scale pleasures like holidays, food, and family, while avoiding "heavy" topics.

Trust Has Retreated to the "Inner Circle"

In a world of misinformation, people are deeply skeptical. Trust has contracted into small, verified networks where **"proximity is proof."** Word-of-mouth from friends, family, and genuine experts in "the circle of trust" is now the most powerful currency.

The Irish cultural context provides a clear insight into *why* public engagement is waning: it's not a rejection of the issue, but an act of self-preservation. This mood suggests that traditional environmental messaging based on moral obligation is likely to be ineffective. The Centre's relevance in this new landscape is therefore tied to its ability to operate within the public's trusted 'inner circle' and offer experiences that feel restorative rather than burdensome.

Ethically Minded Consumers: YOY

The national decline in ethical consumerism masks a significant divergence. This drop is driven almost entirely by rural and C2DE cohorts, whose scores have fallen sharply, while urban and ABC1 consumers hold firm or even grow.



Est. pop of 2,096,000

(2024, 2023, 2021)

% Scoring Highly	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
2026	49%	45%	53%	43%	49%	53%	59%	38%	56%	46%	52%	43%
2024	53%	51%	54%	44%	53%	59%	59%	48%	51%	53%	52%	55%
% change '24 - '26	-4%	-6%	-1%	-1%	-4%	-6%	0%	-10%	5%	-7%	0%	-12%
2023	53%	49%	56%	45%	57%	55%	60%	48%	63%	48%	59%	41%

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

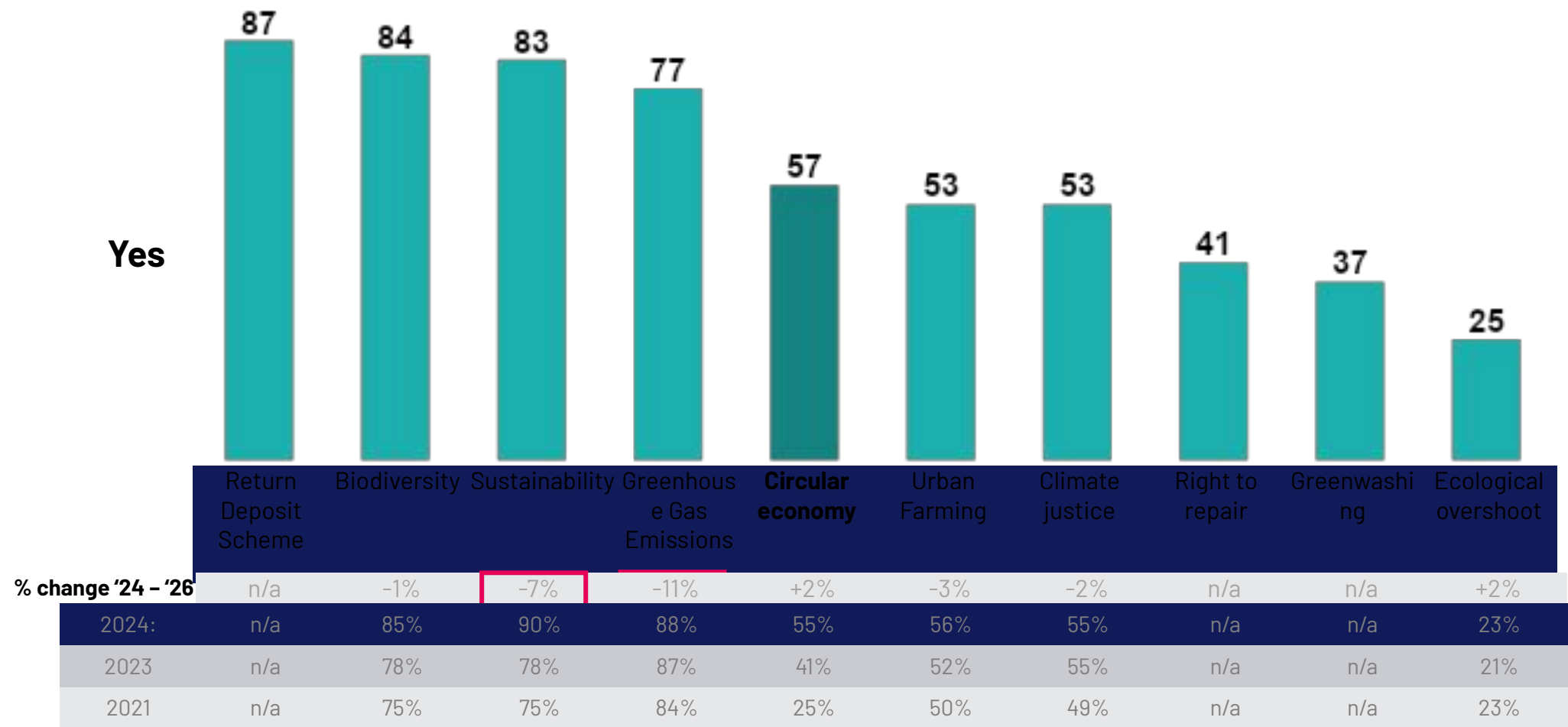
Base: All respondents aged 16+ - 1,005

CIRCULAR ECONOMY: UNDERSTANDING



Environmental Terms: Name Recognition

Recognition of the 'Circular Economy' exhibits a further rise, while public awareness of other key environmental terms like 'sustainability' and 'greenhouse gas emissions' has notably declined. The widespread drop in recognition for core environmental terms is not uniform across the population: the decline is steepest among rural residents.



Q.1 Which of the following terms have you heard of?

Base: All respondents aged 16+ - 1,005

Environmental Terms: Name Recognition

The widespread drop in recognition for core environmental terms is not uniform across the population. The decline is steepest among rural residents, whose awareness of 'sustainability' has dropped by 17 points year-on-year.

NAME RECOGNITION												
Greenhouse Gas Emissions	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
2026	77%	78%	76%	77%	73%	79%	83%	71%	77%	76%	77%	75%
2024	88%	91%	85%	83%	85%	93%	91%	85%	84%	89%	88%	88%
% Change '24 - '26	-11%	-13%	-9%	-6%	-12%	-14%	-8%	-14%	-7%	-13%	-11%	-13%
Sustainability	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
2026	83%	86%	81%	83%	81%	85%	89%	80%	90%	81%	87%	76%
2024	90%	93%	86%	92%	86%	91%	92%	86%	87%	91%	88%	93%
% Change '24 - '26	-7%	-7%	-5%	-9%	-5%	-6%	-3%	-6%	3%	-10%	-1%	-17%

Q.1 Which of the following terms have you heard of?
Base: All respondents aged 16+ - 1,005

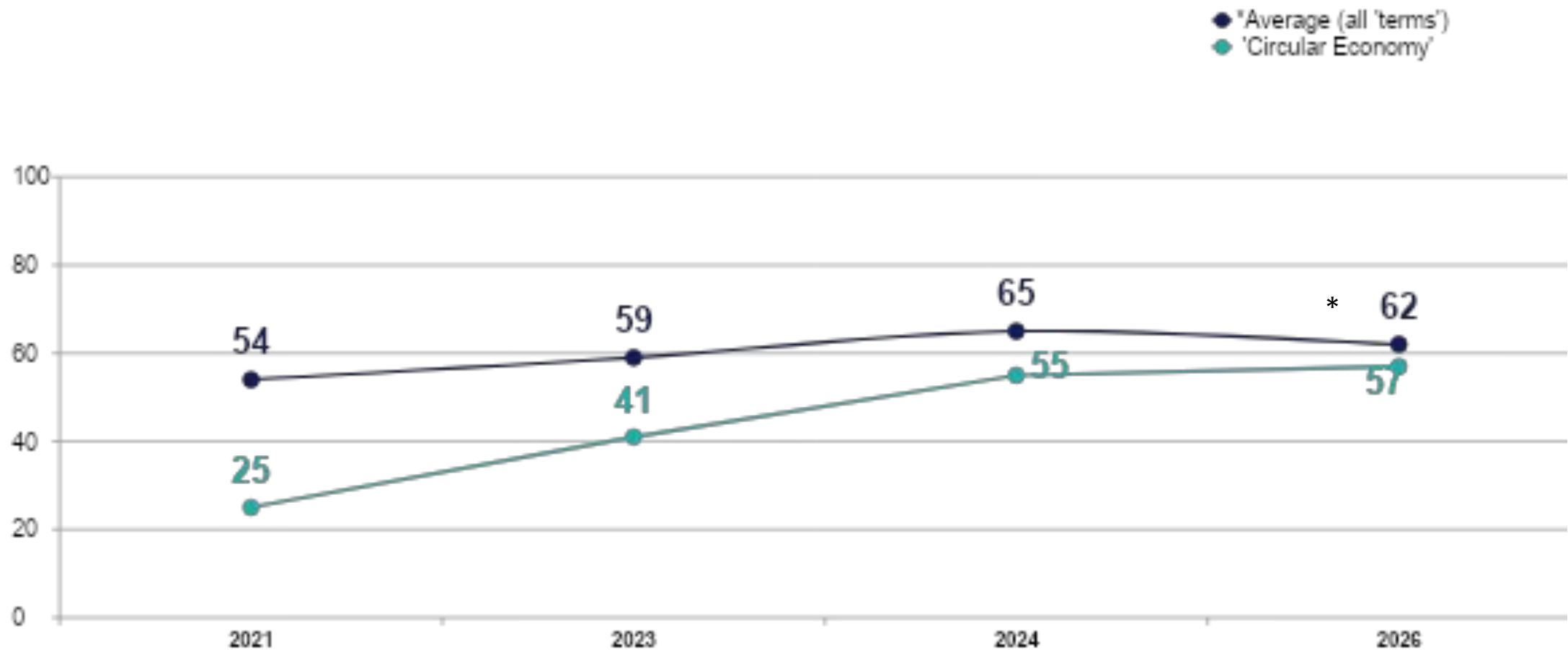
Significantly higher than total

Significantly lower than total



Environmental Terms: Name Recognition 2021-2026 Summary

While awareness of the 'Circular Economy' has grown significantly since 2021, this growth is now stabilising. The gap between recognition of 'Circular Economy' and the declining average for all environmental terms is however narrowing.



Q.1 Which of the following terms have you heard of?

Base: All respondents aged 16+ - 1,005

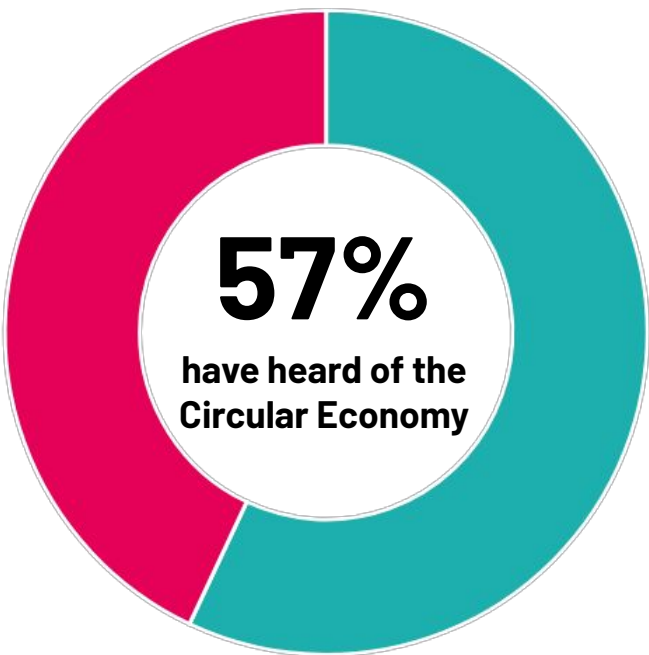
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*Average does not include new terms added in 2026 for tracking purposes

Circular Economy: Name Recognition

Awareness of the 'Circular Economy' now stands at 57% of the adult population, which equates to an estimated 2.4 million people. Recognition is significantly more pronounced among ABC1s.

Heard of 'Circular Economy'



Est. of population who have heard about Circular Economy:
2,438,500

Gender



Age



Kids in Household



Social Class



Region



Area



2024	2023	2021
61%	46%	27%
49%	36%	24%
53%	41%	25%
58%	46%	32%
54%	37%	22%
53%	42%	26%
56%	40%	25%
66%	48%	32%
46%	34%	19%
59%	49%	25%
53%	37%	26%
56%	44%	26%
52%	34%	25%

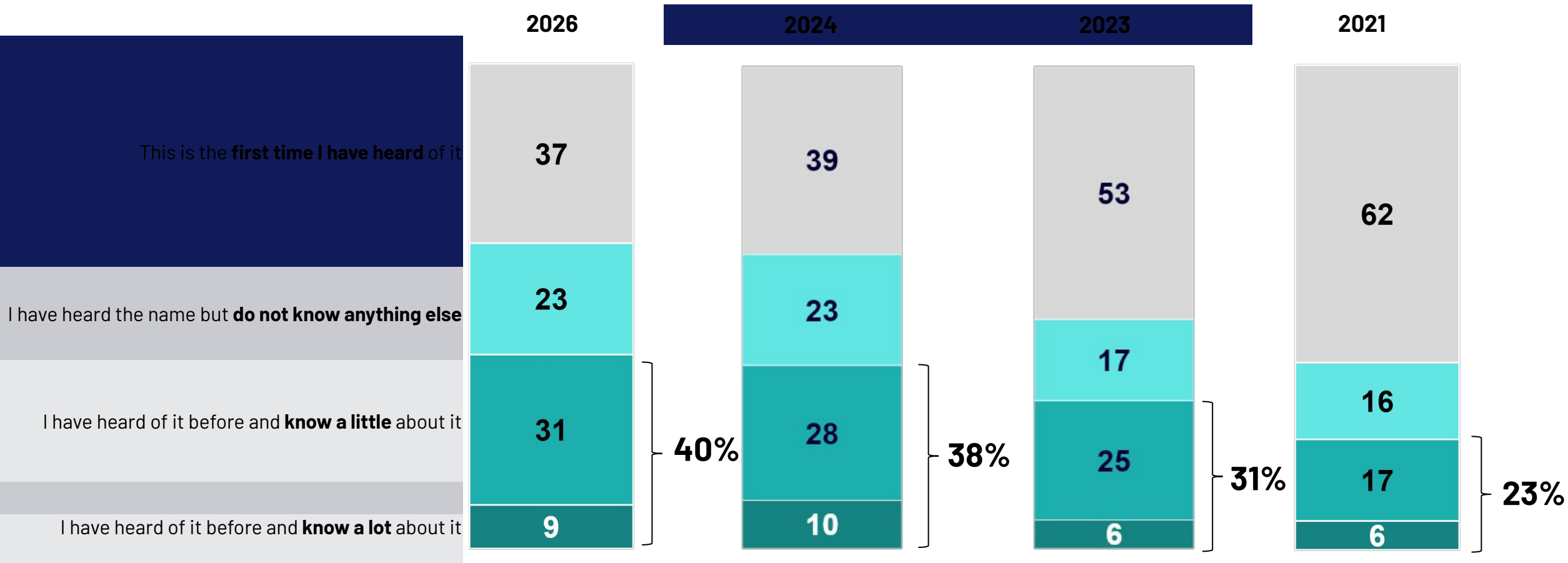
Q.1 Which of the following terms have you heard of?
Base: All respondents aged 16+ - 1,005

Significantly higher than total

Significantly lower than total

Circular Economy: Public Familiarity

Overall public familiarity is also marginally ahead of the 2024 levels, with 40% knowing at least a little about the concept. Notably, the proportion hearing the term for the first time has inverted since 2021, dropping from 62% to 37%.

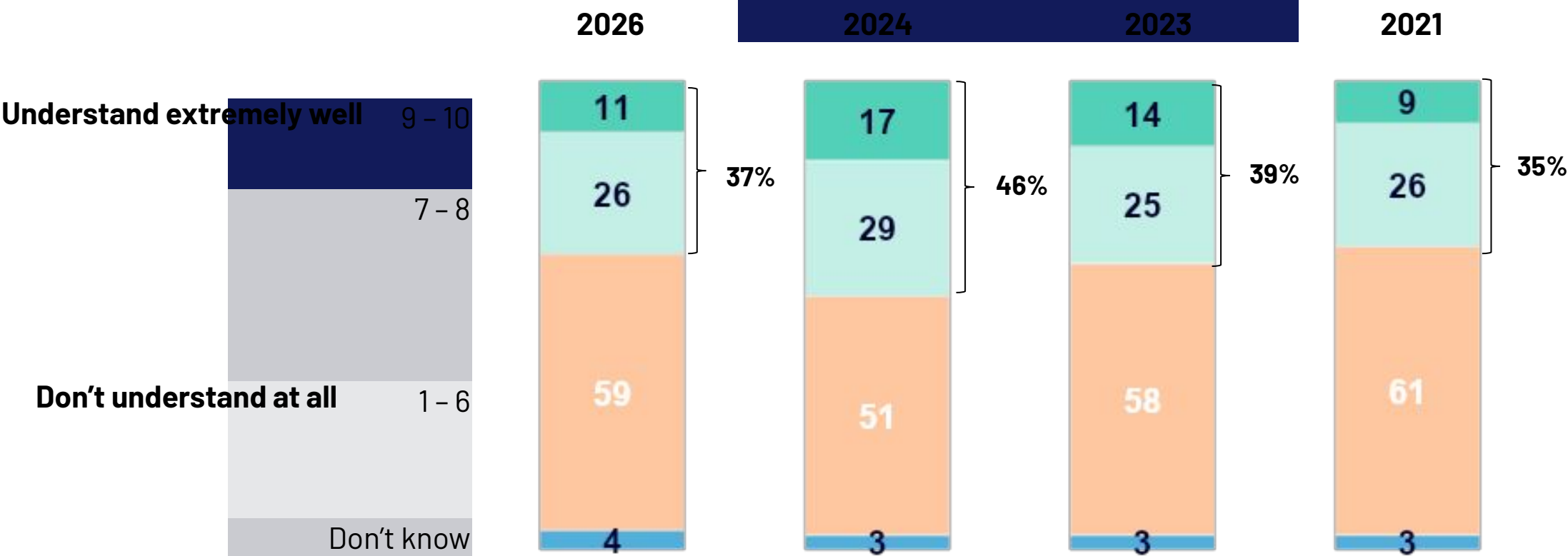


Q.2 Before today how familiar were you with the meaning of the term Circular Economy?
Base: All respondents aged 16+ - 1,005

Explanation included in the survey:
‘A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.’

Circular Economy: Prompted Understanding

Despite stable familiarity, prompted understanding of the Circular Economy concept has seen a significant decline. The proportion claiming to understand it well (a score of 7-10) has dropped by 9 points since 2024.



Q.3 To what extent do you now feel you understand the idea of a Circular Economy?
Base: All respondents aged 16+ - 1,005

Explanation included in the survey:
'A circular economy keeps products in use for as long as possible and avoids waste generation. This can be achieved through sustainable design principles, reuse, repair, remanufacturing, recycling and new business models, such as sharing, renting or offering products as a service.'

Circular Economy: Understanding Summary

Deeper understanding of the Circular Economy has seen a sharp 9-point reversal from 2024. This national decline is driven by a dramatic drop-off among rural (-19pts) and younger (-13pts) cohorts, creating a widening knowledge gap.

Understanding 7-10	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1005	471	534	273	266	466	588	392	306	699	680	325
2026	37%	37%	37%	37%	37%	37%	47%	29%	47%	33%	40%	32%
2024	46%	47%	45%	50%	43%	44%	53%	38%	43%	47%	43%	51%
%Change '24-'26	-9%	-10%	-8%	-13%	-6%	-7%	-6%	-9%	+4%	-14%	-3%	-19%

Q.2 Before today how familiar were you with the meaning of the term Circular Economy?
Q.3 To what extent do you now feel you understand the idea of a Circular Economy?
Q.4 To what extent do you think moving to a Circular economy is a good idea?
Base: All respondents aged 16+ - 1,005

Significantly higher than total
Significantly lower than total



A woman in a beige sleeveless top and high-waisted skirt stands on the left, gesturing with her hands while speaking. She is facing a group of three people seated at a table. The seated individuals include a woman with long brown hair seen from behind, a man in a light blue shirt, and a man in a beige shirt looking towards the presenter. On the table are a laptop and a dark green water bottle. In the background, a large window looks out onto green foliage. To the left of the presenter, a poster titled 'Circular Economy' is visible, featuring a circular diagram and text including 'Societal', 'Emission', '3.5 BN', and 'Low Carbon'.

CIRCULAR ECONOMY: FAMILIARITY & INTEREST

Circular Economy: Detailed Familiarity & Interest

The following statements were rated on familiarity and interest by respondents.

Involves **businesses reducing the quantity of waste** they generate and the amount of harmful substances their waste contains

Requires businesses **offering people new ways to access products such as renting, leasing and purchasing second hand.**

Organisations and people together **changing the way they make, purchase and use products** to develop a climate friendly and strong economy.

Involves designing products so their **lifetime and usability is extended.**

Reduces/prevents **packaging waste**

Involves **people** changing the way they access and use products by emphasising **renting, sharing, repairing, and reusing.**

Requires organizations to **examine where their supplies come from** and minimise the journey they take around the world

Can **take shape across many scales**, from small household items to the architecture of entire buildings



Circular Economy: Detailed Familiarity

When prompted with specific features, familiarity is highest with waste reduction, particularly for packaging. While overall levels are consistent with 2024, there's a concerning drop in associating 'product design' with the Circular Economy.



Summary 7-10			
2026	2024	2023	2021
68%	69%	70%	61%
55%	61%	58%	50%
55%	58%	59%	50%
56%	58%	58%	53%
53%	52%	55%	50%
52%	53%	54%	47%
53%	53%	55%	-
49%	52%	54%	46%

Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved?
Base: Prior Awareness Circular Economy - 723

Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results

Circular Economy: Detailed Interest

While interest in the specific benefits of the Circular Economy is generally high, 2026 has seen a decrease across all measured features. This dip is evident even in top areas like waste prevention and product design.



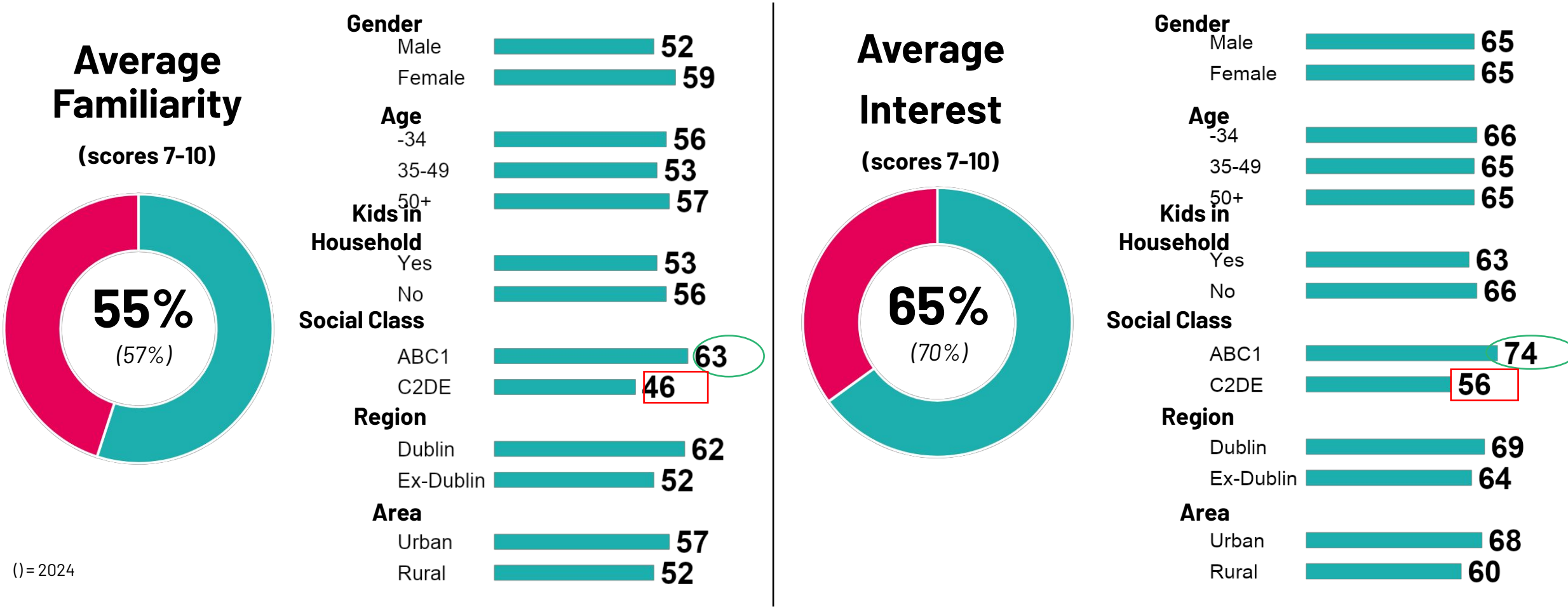
Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?

Base: All respondents aged 16+ - 1,005

Note: wording of statements changed in 2023. Albeit the concept is the same, it shouldn't be considered a perfect comparison with 2021 results

Circular Economy: Average Familiarity and Interest across Demos

Average familiarity with Circular Economy features is down marginally, but there is a more significant drop in average interest this year. Engagement on both metrics remains highest among the ABC1 demographic.



Q.5 To what extent were you familiar prior to this interview that the Circular Economy involved?
Base: Prior Awareness Circular Economy - 723
Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?
Base: All respondents aged 16+ - 1,005

Significantly higher than total

Significantly lower than total



Circular Economy: Detailed Interest

The national decline in interest for core CE features is a story of two Irelands. While interest among urban residents holds steady, a dramatic collapse in engagement among the rural population is driving the overall drop.

Interest (7-10)		Total	Gender		Age			Social Class		Region		Area	
			Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
Reduces/prevents packaging waste	2026	71%	71%	72%	69%	73%	72%	77%	64%	75%	70%	75%	66%
	2024	78%	77%	80%	77%	78%	79%	82%	74%	81%	78%	75%	86%
	% change	-7%	-6%	-8%	-8%	-5%	-7%	-5%	-10%	-6%	-8%	0%	-20%
Involves designing products so their lifetime and usability is extended.	2026	67%	66%	68%	71%	65%	66%	77%	57%	73%	65%	70%	61%
	2024	74%	74%	73%	73%	73%	75%	79%	68%	77%	72%	71%	78%
	% change	-7%	-8%	-5%	-2%	-8%	-9%	-2%	-11%	-4%	-7%	-1%	-17%
Involves businesses reducing the quantity of waste they generate and the amount of harmful substances their waste contains	2026	67%	66%	68%	71%	65%	66%	77%	57%	73%	65%	70%	61%
	2024	74%	74%	73%	73%	73%	75%	79%	68%	77%	72%	71%	78%
	% change	-7%	-8%	-5%	-2%	-8%	-9%	-2%	-11%	-4%	-7%	-1%	-17%

Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?

Base: All respondents aged 16+ - 1,005

Circular Economy: Detailed Interest

The cooling of interest extends across other CE features, with engagement declining in most demographic groups. The trend of rural disengagement continues to be a primary factor, with this cohort showing the most significant drops across these statements.

Interest (7-10)		Total	Gender		Age			Social Class		Region		Area	
			Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
Requires organizations to examine where their supplies come from and minimise the journey they take around the world	2026	65%	65%	65%	65%	64%	66%	72%	57%	71%	63%	69%	58%
	2024	68%	66%	70%	66%	67%	69%	77%	60%	74%	65%	67%	68%
	% change	-3%	-1%	-5%	-1%	-3%	-3%	-5%	-3%	-3%	-2%	2%	-10%
Involves people changing the way they access and use products by emphasising renting, sharing, repairing, and reusing.	2026	63%	63%	64%	64%	65%	62%	72%	53%	64%	63%	66%	59%
	2024	69%	67%	71%	69%	71%	68%	75%	64%	73%	67%	69%	69%
	% change	-6%	-4%	-7%	-5%	-6%	-6%	-3%	-11%	-9%	-4%	-3%	-10%
Organizations and people together changing the way they make, purchase and use products to develop a climate friendly and strong economy.	2026	63%	64%	63%	66%	63%	62%	74%	53%	68%	62%	67%	58%
	2024	67%	67%	67%	68%	66%	68%	75%	61%	75%	64%	68%	66%
	% change	-4%	-3%	-4%	-2%	-3%	-6%	-1%	-8%	-7%	-2%	-1%	-8%

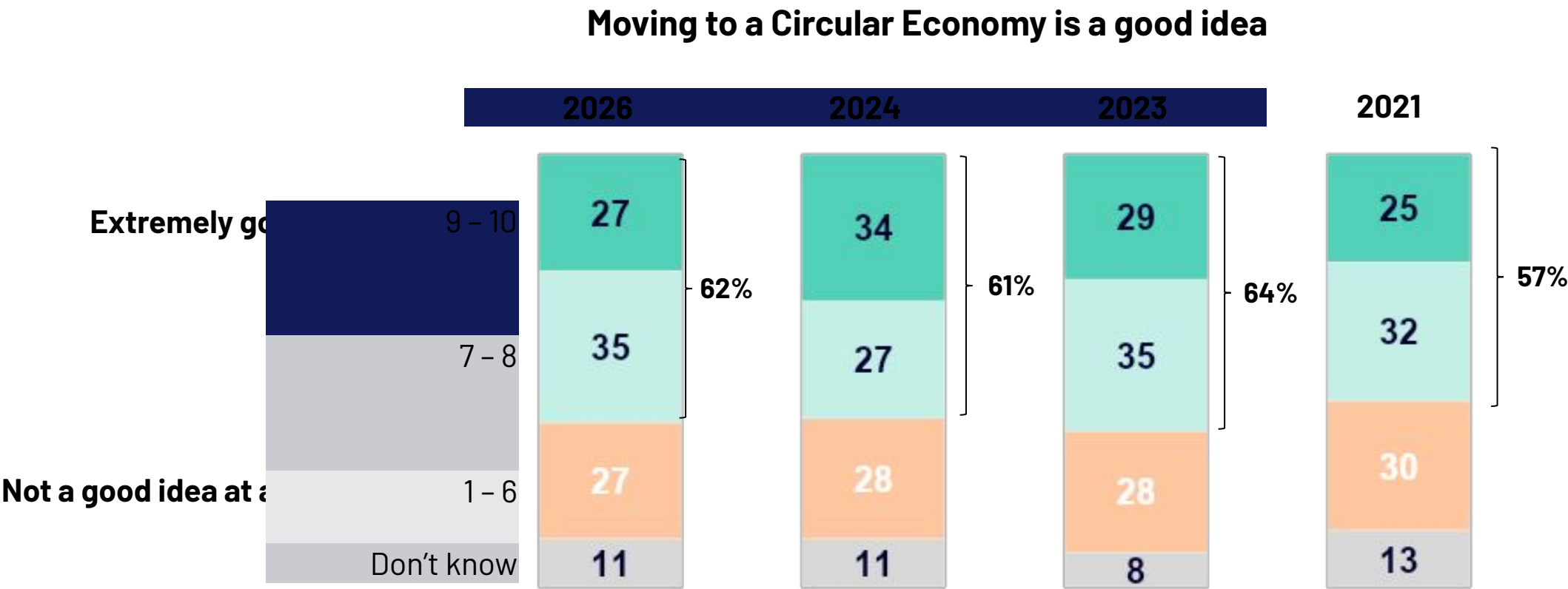
Q.6 Looking at this list of features of the Circular Economy, from a personal perspective, how interesting is each of these to you?

Base: All respondents aged 16+ - 1,005

CIRCULAR ECONOMY: SUPPORT

Circular Economy: Overall Support

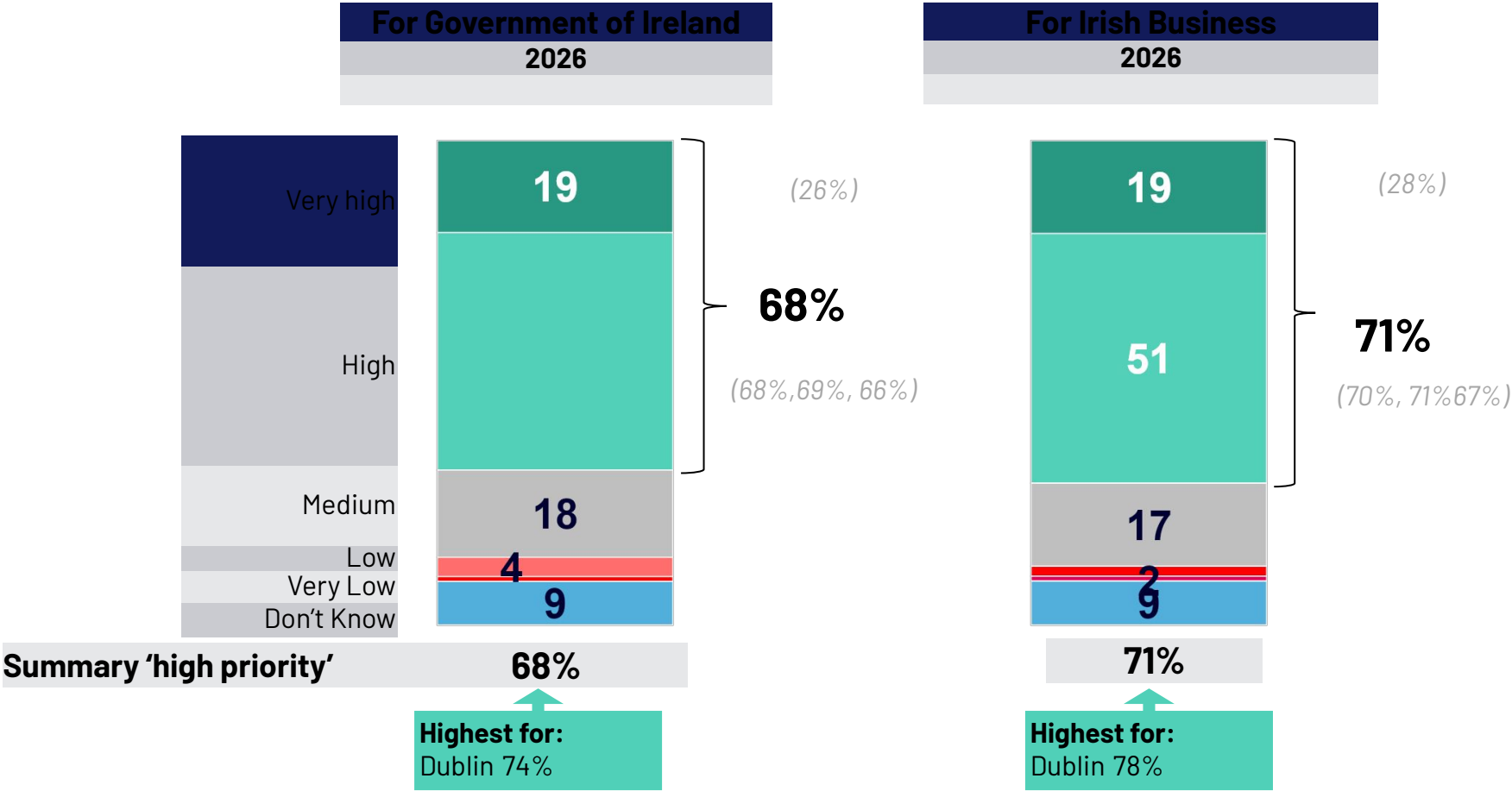
While overall support for the transition to a Circular Economy remains stable at 60%+, there has been a softening in strong support (9-10 score).



Q.4 To what extent do you think moving to a Circular economy is a good idea?
Base: All respondents aged 16+ - 1,005
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Circular Economy: Should it Be a Priority?

A strong consensus continues to exist that the Circular Economy should be a high priority, with around 7 in 10 adults saying so for both the Government and Irish businesses. Again however, the strength of the support is softening.



Othering:

The global trend of a decline in personal interest and a maintained expectation of the government to keep performing can be seen in the Irish results and is a prime example of the climate fatigue among the Irish public.

Q.7a Do you think the Circular Economy should be a high, medium, or low priority for the Government of Ireland?

Q.7b Do you think the Circular Economy should be a high, medium, or low priority for Irish businesses?

Base: All respondents aged 16+ - 1,005

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Circular Economy: Support Summary

The stable national average for CE support conceals a dramatic and growing polarisation in attitudes. Strong growth in support from urban residents (+10pts) is being completely offset by a significant collapse among rural residents (-16pts).

	Year	Total	Gender		Age			Social Class		Region		Area	
			Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
Good idea (7-10)	2026	62%	61%	62%	62%	60%	62%	69%	57%	70%	58%	67%	52%
	2024	61%	61%	60%	60%	62%	60%	66%	54%	63%	60%	57%	68%
	% Change	1%	0%	+2%	+2%	-2%	+2%	+3%	+3%	+7%	-2%	+10%	-16%
CE should be a High Priority for Govt.	2026	68%	65%	72%	63%	68%	72%	74%	63%	74%	66%	73%	59%
	2024	68%	65%	71%	69%	67%	68%	72%	64%	74%	66%	69%	67%
	% Change	0%	0%	+1%	-6%	+1%	+4%	+2%	-1%	0%	0%	+4%	-8%
CE should be a High Priority for Businesses	2026	71%	69%	72%	67%	71%	72%	76%	65%	78%	68%	76%	62%
	2024	70%	67%	73%	69%	68%	71%	72%	67%	72%	69%	70%	70%
	% Change	+1%	+2%	-1%	-2%	+3%	+1%	+4%	-2%	+6%	-1%	+6%	-8%

Q.2 Before today how familiar were you with the meaning of the term Circular Economy?
Q.3 To what extent do you now feel you understand the idea of a Circular Economy?
Q.4 To what extent do you think moving to a Circular economy is a good idea?
Base: All respondents aged 16+ - 1,005

Significantly higher than total

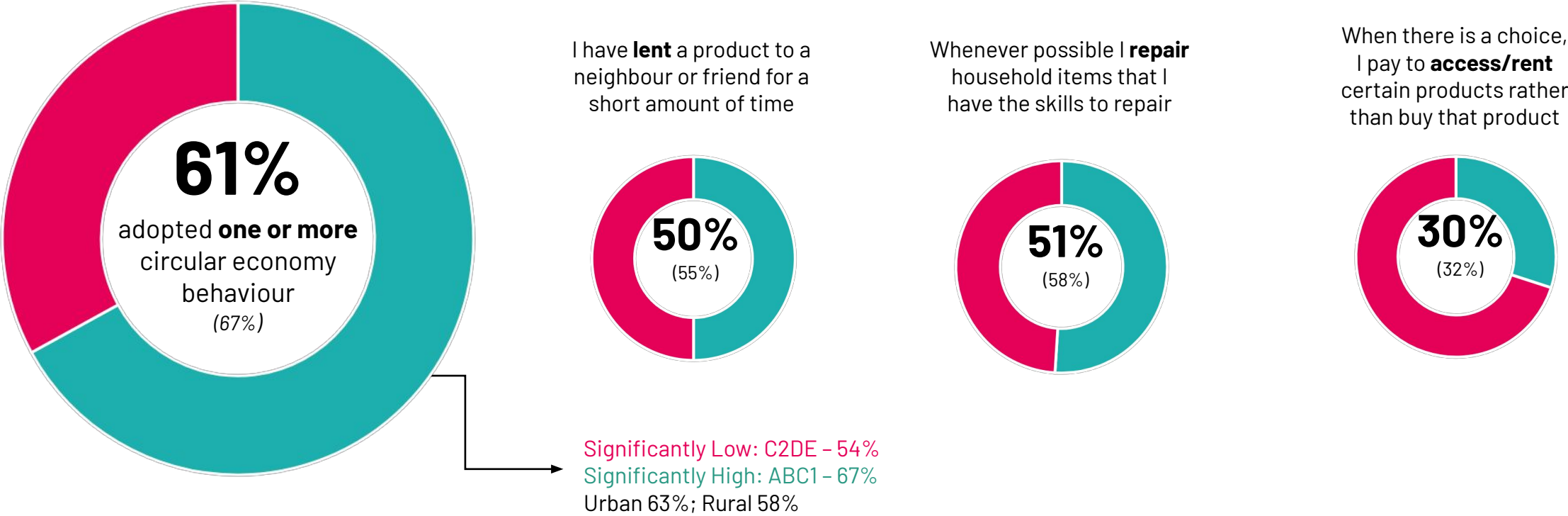
Significantly lower than total



Circular Economy Behaviour

While a majority (61%) engage in at least one key circular behaviour, participation in specific actions has declined. Self-reported repairing of items and lending products to others have both seen a drop since the 2024 survey.

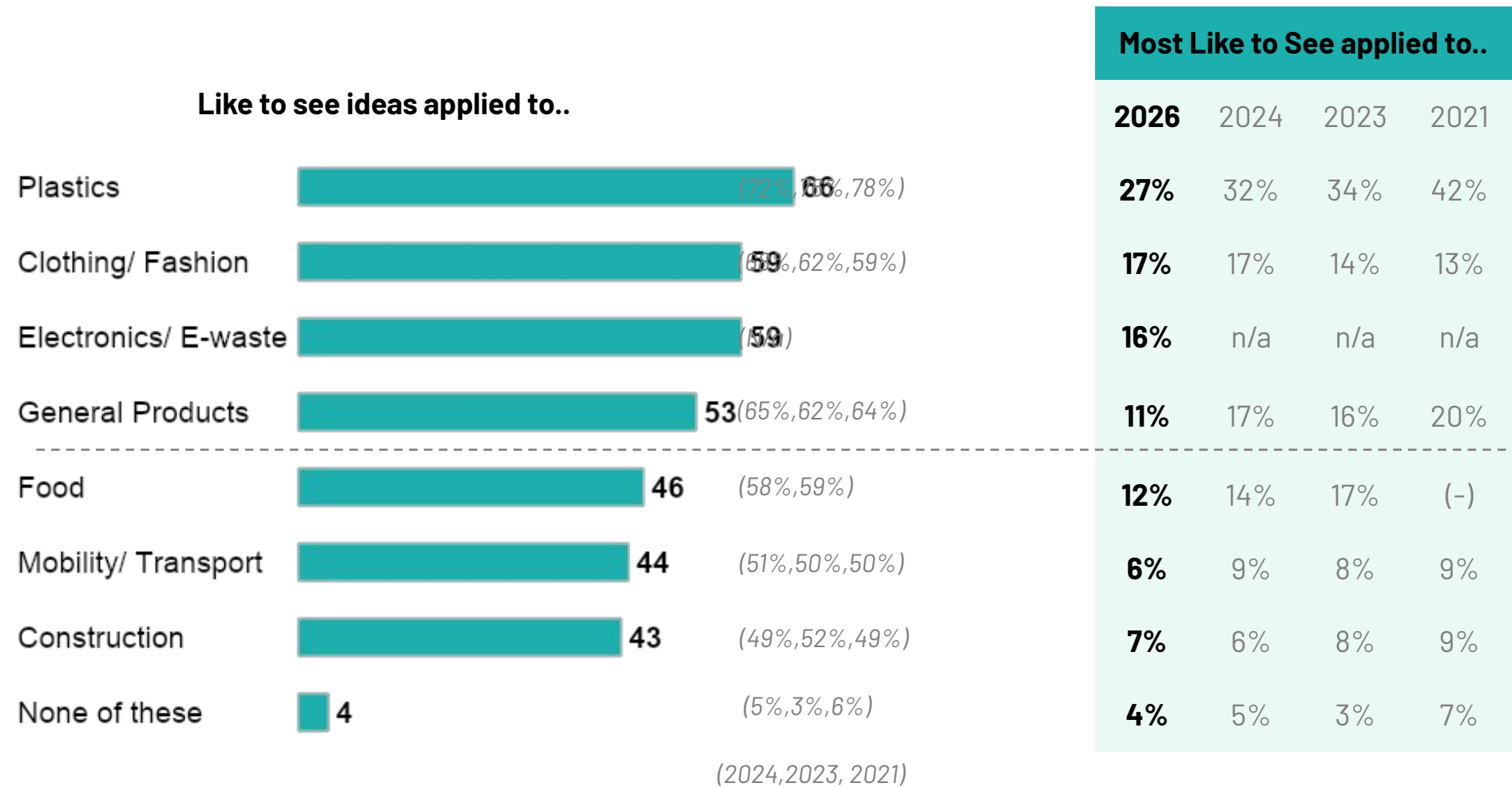
ANY CIRCULAR ECONOMY BEHAVIOUR



Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.
Base: All respondents aged 16+ – 1,005

Circular Economy: Application to economic sectors

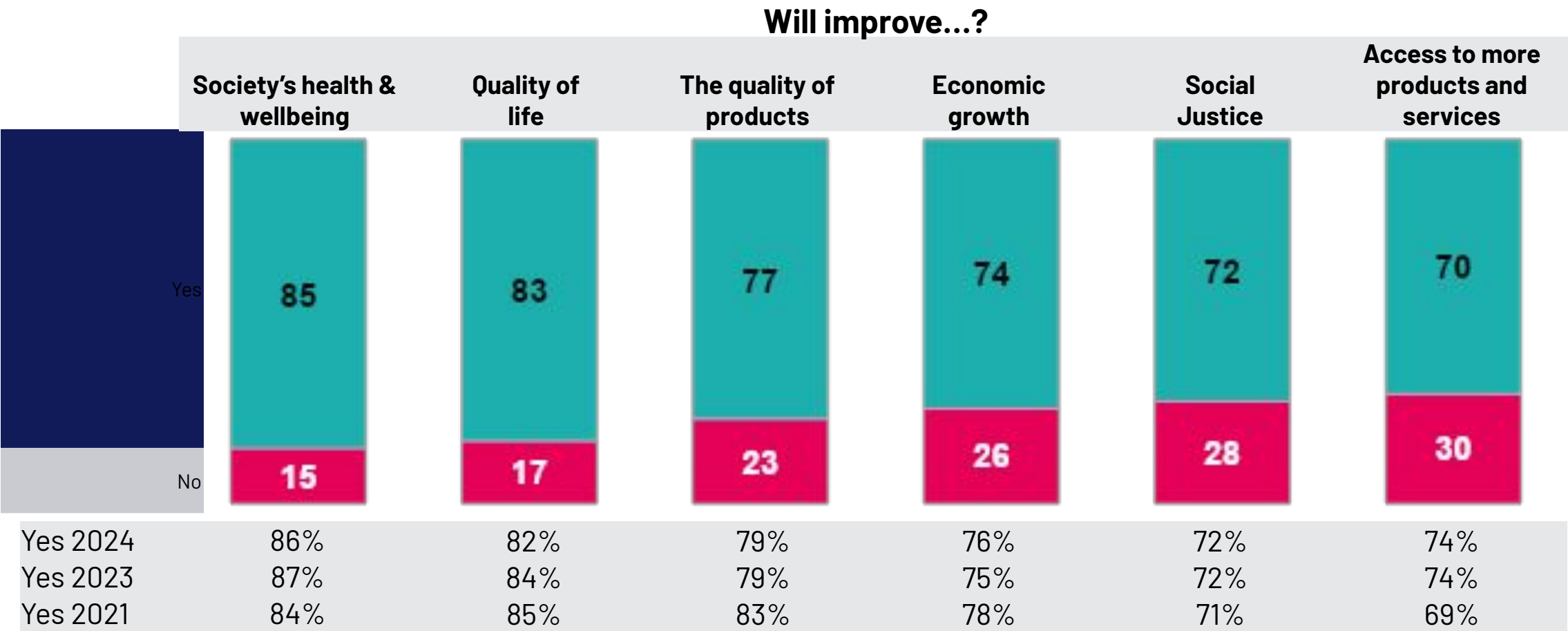
Plastics, Clothing, and Electronics are the top sectors where the public wants to see Circular Economy principles applied. However, the appetite for this application has declined across most listed sectors compared to previous years.



Q.8a Which, if any, of the following sectors would you like to see the ideas of the Circular Economy applied to?
Q.8b Which, if any, of the following sectors would you most like to see the ideas of the Circular Economy applied to?
Base: All respondents aged 16+ - 1,005

Circular Economy: Its Benefits

The public perceives broad benefits from a Circular Economy, with strong belief it will improve societal health & wellbeing and quality of life. These positive perceptions have remained stable and consistent with 2024 findings.



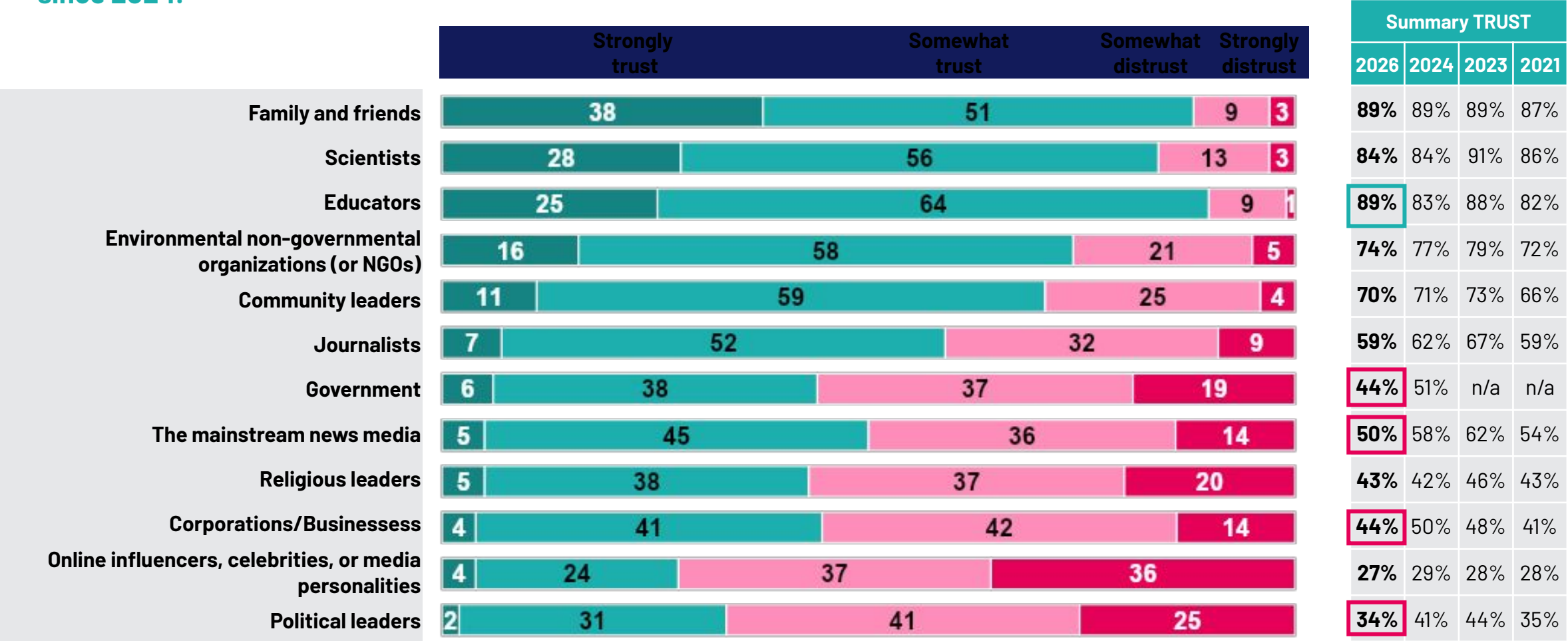
Q.9 Overall, do you think that taking action to support a Circular Economy will improve or not each of the following?

Base: All respondents aged 16+ - 1,005

CIRCULAR ECONOMY: NATIONAL APPROACH

Circular Economy: Trusted Sources of Info

Trust remains highest in personal and expert sources like family, friends, scientists, and educators. Notably, trust in educators has risen, while trust in mainstream media, corporations, and political leaders has declined since 2024.



Q.10 How much do you trust or distrust the following as a source of information about the Circular Economy?
Base: All respondents aged 16+ - 1,005

Circular Economy: Trusted Sources by demos

While trust in sources is broadly consistent across different demographic groups, there are a few key exceptions. Notably, younger audiences show significantly higher trust in online influencers, while ABC1s place greater faith in institutional sources like government and mainstream media. Rural residents are especially sceptical of government and journalists.

Any Trust	Total	Gender		Kids in HH		Age			Social Class		Region		Area	
		Male	Female	Yes	No	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1005	471	534	323	682	273	266	466	588	392	306	699	680	325
Family and friends	89%	88%	90%	87%	90%	88%	88%	90%	90%	88%	88%	89%	89%	88%
Scientists	84%	83%	85%	84%	84%	89%	82%	83%	87%	80%	87%	83%	87%	79%
Educators	89%	89%	90%	89%	89%	89%	90%	89%	92%	86%	91%	88%	92%	84%
Environmental non-governmental organizations (or NGOs)	74%	71%	77%	75%	74%	80%	71%	72%	79%	69%	82%	71%	76%	71%
Community leaders	70%	68%	72%	74%	69%	71%	73%	68%	74%	65%	68%	71%	72%	68%
The mainstream news media	50%	52%	47%	49%	51%	55%	48%	48%	56%	44%	50%	50%	52%	46%
Journalists	59%	56%	61%	59%	59%	66%	53%	57%	66%	50%	68%	55%	63%	51%
Government	44%	43%	46%	45%	44%	50%	45%	40%	55%	35%	50%	42%	50%	35%
Religious leaders	43%	42%	45%	42%	44%	43%	39%	46%	46%	39%	41%	44%	47%	38%
Corporations/Businesses	44%	40%	48%	47%	43%	48%	44%	42%	46%	41%	41%	46%	45%	43%
Political leaders	34%	32%	35%	33%	34%	37%	33%	31%	39%	27%	34%	33%	36%	29%
Online influencers, celebrities, or media personalities	27%	24%	30%	30%	26%	36%	31%	19%	31%	23%	30%	26%	32%	20%

Q.10 How much do you trust or distrust the following as a source of information about the Circular Economy? ...

Base: All respondents aged 16+ - 1,005

Significantly higher than total

Significantly lower than total

Circular Economy: Communication routes

Respondents rated the following communication related statements on the extent to which they agreed with them.

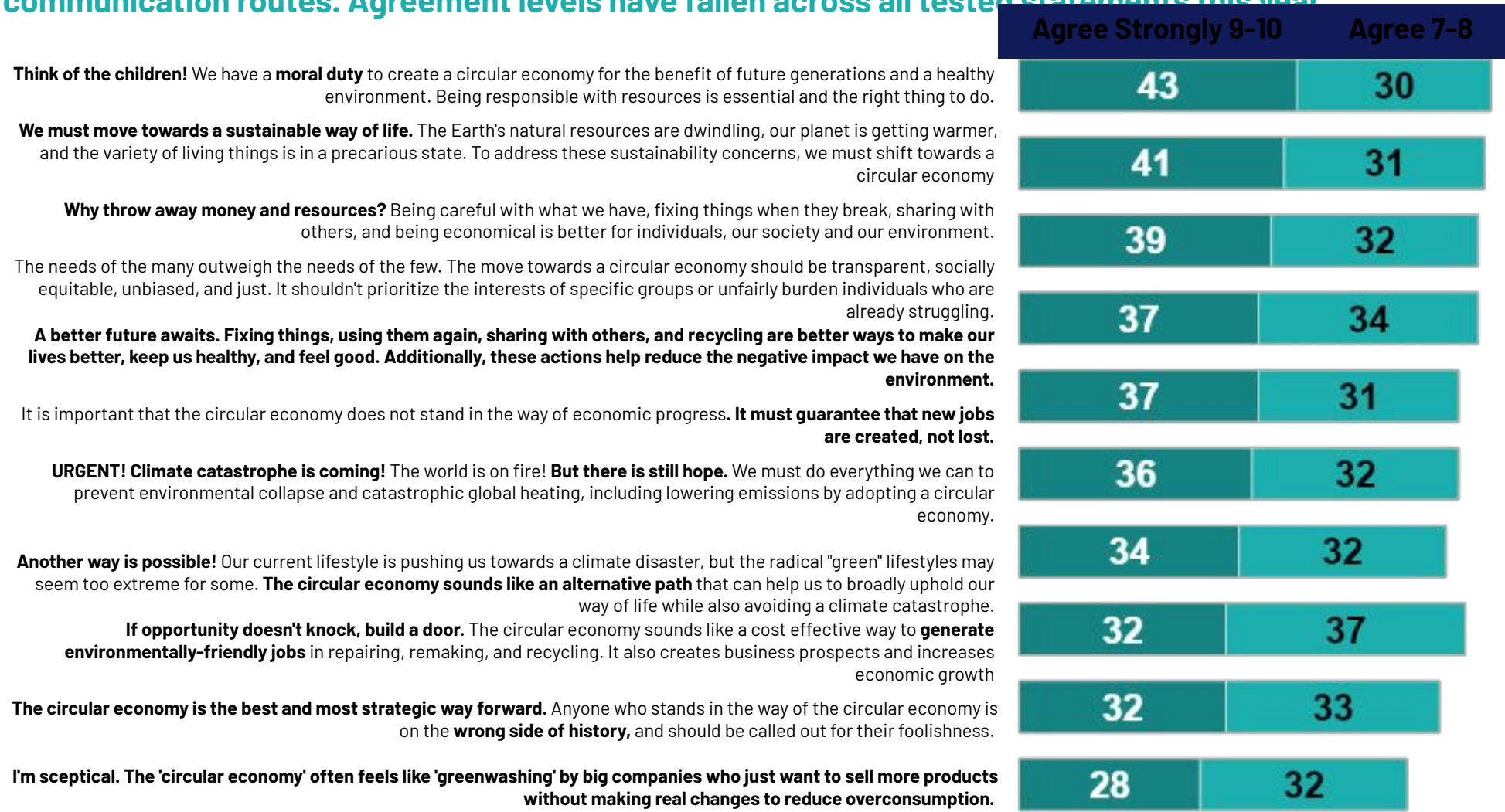


Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,002

Circular Economy: Communication routes

Messages centred on 'moral duty' to future generations, 'sustainability', and 'thrift' are the most compelling communication routes. Agreement levels have fallen across all tested statements this year



Summary 7-10		
2026	2024	2023
73%	79%	80%
72%	76%	78%
71%	78%	82%
71%	78%	79%
68%	78%	79%
68%	73%	75%
67%	71%	74%
68%	74%	75%
65%	72%	76%
61%	63%	67%
51%	n/a	n/a

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,005

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Circular Economy: Communication routes by demos

The resonance of different communication platforms varies significantly across demographics. Higher socio-economic groups (ABC1s), older individuals (50+), and Dublin residents consistently show the strongest agreement with the messages about the Circular Economy.

Strongly Agree (9-10) %	Total	Gender		Kids in HH		Age			Social Class		Region		Area	
		Male	Female	Yes	No	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1005	471	534	323	682	273	266	466	602	403	306	699	680	325
Think of the children! We have a moral duty to create a circular economy for the benefit of future generations and a healthy environment. Being responsible with resources is essential and the right thing to do.	43	42	45	42	44	44	41	44	52	33	45	42	43	43
We must move towards a sustainable way of life. The Earth's natural resources are dwindling, our planet is getting warmer, and the variety of living things is in a precarious state. To address these sustainability concerns, we must shift towards a circular economy.	41	39	43	42	40	41	41	41	50	32	45	39	42	39
Why throw away money and resources? Being careful with what we have, fixing things when they break, sharing with others, and being economical is better for individuals, our society and our environment.	39	39	40	39	40	39	38	41	48	30	42	38	40	39
The needs of the many outweigh the needs of the few. The move towards a circular economy should be transparent, socially equitable, unbiased, and just. It shouldn't prioritize the interests of specific groups or unfairly burden individuals who are already struggling.	37	35	38	37	36	35	36	39	45	29	38	36	38	34
A better future awaits. Fixing things, using them again, sharing with others, and recycling are better ways to make our lives better, keep us healthy, and feel good. Additionally, these actions help reduce the negative impact we have on the environment.	37	39	35	36	38	34	38	38	46	28	42	35	39	34
It is important that the circular economy does not stand in the way of economic progress. It must guarantee that new jobs are created, not lost.	36	34	38	32	38	36	34	37	41	30	37	36	38	32
URGENT! Climate catastrophe is coming! The world is on fire! But there is still hope. We must do everything we can to prevent environmental collapse and catastrophic global heating, including lowering emissions by adopting a circular economy.	34	34	34	31	35	33	30	37	43	25	37	33	35	32
Another way is possible! Our current lifestyle is pushing us towards a climate disaster, but the radical "green" lifestyles may seem too extreme for some. The circular economy sounds like an alternative path that can help us to broadly uphold our way of life while also avoiding a climate catastrophe.	32	31	34	33	32	30	32	35	40	25	35	31	34	31
If opportunity doesn't knock, build a door. The circular economy sounds like a cost effective way to generate environmentally-friendly jobs in repairing, remaking, and recycling. It also creates business prospects and increases economic growth.	32	31	32	30	33	27	32	35	40	24	36	30	34	28
The circular economy is the best and most strategic way forward. Anyone who stands in the way of the circular economy is on the wrong side of history , and should be called out for their foolishness.	28	26	31	29	28	27	29	29	33	25	32	27	31	23
I'm sceptical. The 'circular economy' often feels like 'greenwashing' by big companies who just want to sell more products without making real changes to reduce overconsumption.	22	23	20	23	21	21	19	23	23	20	18	23	21	22

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,005

Significantly higher than total

Significantly lower than total

Circular Economy: Communication routes YOY

The effectiveness of all communication platforms has fallen significantly year-on-year. This decline is most severe among rural (-16pts) and C2DE (-11pts) audiences, signalling a growing disconnect with these key cohorts.

Average Strongly Agree 9-10	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
2026	31%	31%	32%	30%	30%	33%	38%	25%	34%	30%	32%	29%
2024	39%	36%	42%	36%	39%	42%	42%	36%	36%	41%	37%	45%
% change '24 - '26	-8%	-5%	-10%	-6%	-9%	-9%	-4%	-11%	-2%	-11%	-5%	-16%
2023	39%	38%	40%	36%	40%	40%	44%	35%	39%	39%	41%	35%

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

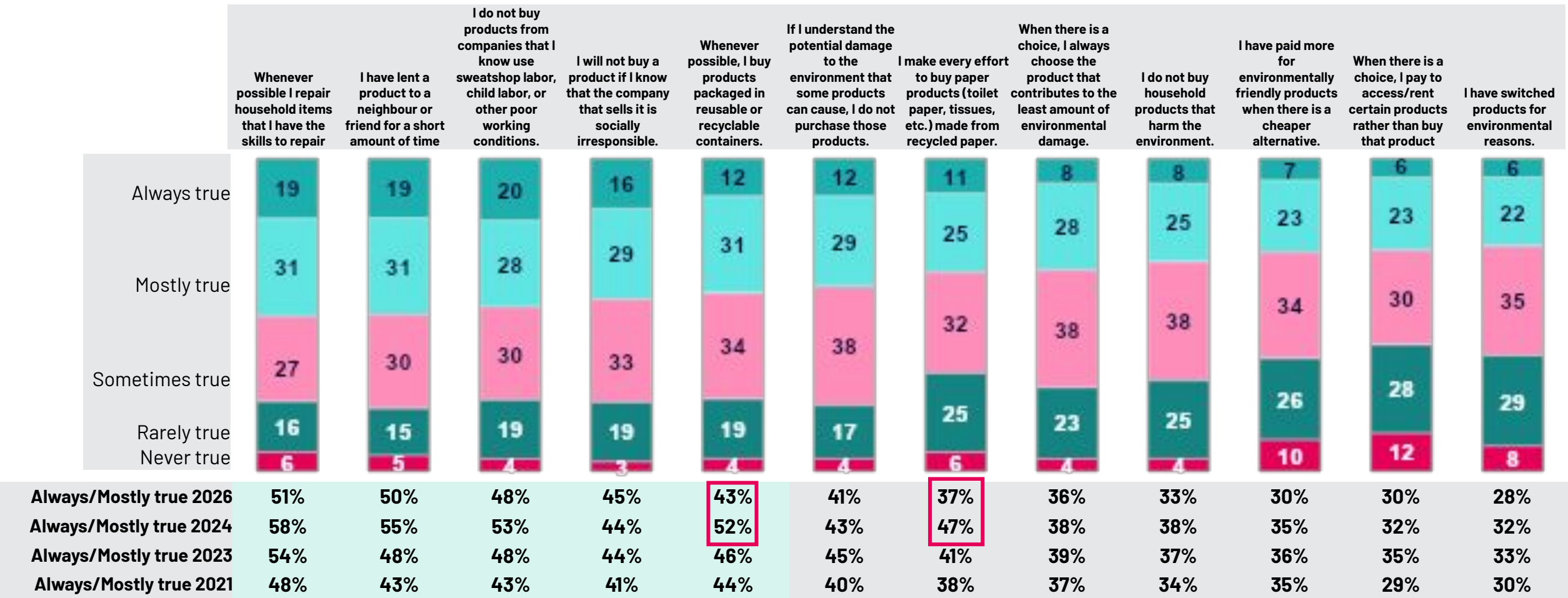
Base: All respondents aged 16+ - 1,005

ETHICALLY MINDED CONSUMER BEHAVIOUR



Ethically Minded Consumer Behaviour

Repairing household items and lending products are the most common self-reported ethical behaviours. However, 2026 sees a notable decline across most ethically minded behaviours when compared to the 2024 results.



Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.

Base: All respondents aged 16+ - 1,005

**Source: Sudbury-Riley L, Kohlbacher F (2016) Ethically minded consumer behavior: scale review, development, and validation: the scale conceptualises ethically minded consumer behavior as a variety of consumption choices pertaining to environmental issues, sustainability and corporate social responsibility. Developed and extensively tested among consumers in the UK, Germany, Hungary, and Japan, the scale demonstrates reliability, validity, and metric measurement invariance across these diverse nations.*



Ethically Minded Consumer Behaviour

The primary barriers to adopting more circular behaviours are practical and financial. A lack of local/affordable repair services, a personal skills gap, and the higher cost of sustainable options are the most cited challenges.

Thinking about activities like repairing items, buying second-hand, renting, or choosing sustainable products, which of the following are the biggest challenges or barriers for you personally?	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
	1005	471	534	273	266	466	602	403	306	699	680	325
There is a lack of local or affordable repair services	31%	27%	35%	26%	33%	33%	34%	28%	31%	30%	33%	26%
I don't have the skills to repair items myself	28%	20%	34%	25%	29%	29%	29%	27%	29%	27%	29%	24%
They are often more expensive	24%	22%	26%	25%	22%	23%	22%	24%	22%	24%	23%	25%
There is a lack of availability or choice where I shop	21%	20%	22%	21%	24%	19%	24%	18%	20%	21%	22%	20%
It takes too much time and effort	19%	21%	17%	24%	20%	15%	20%	19%	21%	18%	20%	18%
I lack information or don't know what to look for	18%	16%	21%	21%	18%	17%	20%	18%	20%	18%	19%	18%
It is less convenient than buying new products	16%	16%	15%	17%	14%	15%	19%	14%	20%	14%	16%	15%
It's not a priority for me right now	16%	19%	14%	21%	15%	14%	13%	16%	16%	16%	13%	22%
I have concerns about the quality, hygiene, or reliability of used or repaired goods	15%	16%	15%	14%	17%	15%	18%	13%	16%	15%	15%	16%
I'm not convinced my individual actions make a real difference	7%	7%	7%	8%	5%	8%	6%	8%	6%	7%	7%	7%
None of these – I don't face any major barriers	6%	8%	5%	5%	6%	7%	4%	8%	6%	6%	6%	7%
Don't Know	5%	6%	5%	6%	5%	5%	4%	6%	6%	5%	6%	3%

Q.11b Thinking about activities like repairing items, buying second-hand, renting, or choosing sustainable products, which of the following are the biggest challenges or barriers for you personally? – PLEASE SELECT UP TO THREE

Base: All respondents aged 16+ - 1,005

Ethically Minded Consumers

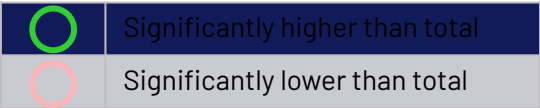
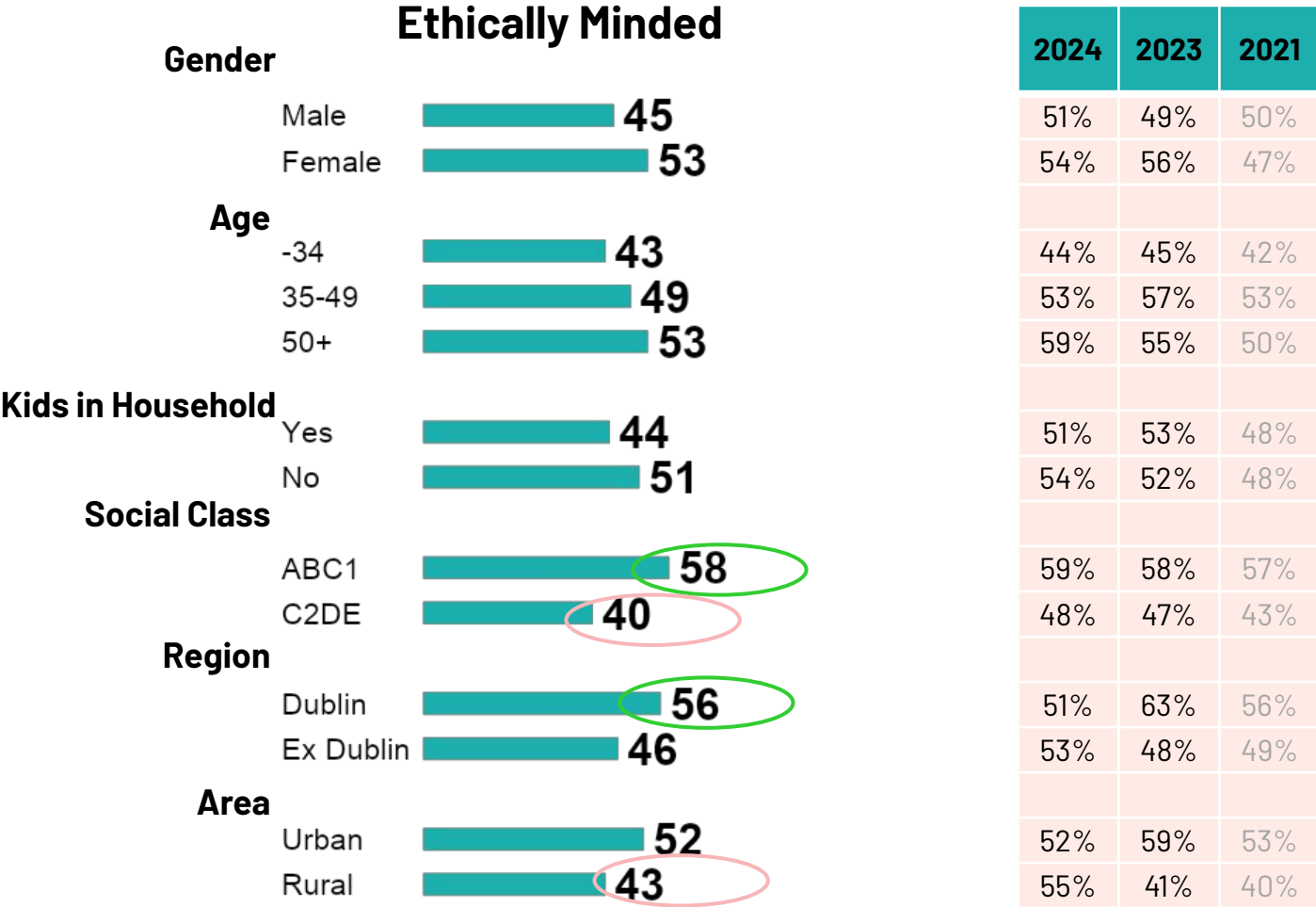
Older demographics (50+) and ABC1s continue to score highest on the ethically minded consumer scale. A notable trend this year is the fall in scores among rural residents.



Est. pop of 2,096,000

(2024, 2023, 2021)

Q.11 Please record your responses to each of the below statements using the 5-point scale running from never true to always true.
Base: All respondents aged 16+ - 1,005



Ethically Minded Consumers: YOY

The national decline in ethical consumerism masks a significant divergence. This drop is driven almost entirely by rural and C2DE cohorts, whose scores have fallen sharply, while urban and ABC1 consumers hold firm or even grow.

% Scoring Highly	Total	Gender		Age			Social Class		Region		Area	
		Male	Female	-34	35-49	50+	ABC1	C2DE	Dublin	Ex Dublin	Urban	Rural
2026	49%	45%	53%	43%	49%	53%	59%	38%	56%	46%	52%	43%
2024	53%	51%	54%	44%	53%	59%	59%	48%	51%	53%	52%	55%
% change '24 - '26	-4%	-6%	-1%	-1%	-4%	-6%	0%	-10%	5%	-7%	0%	-12%
2023	53%	49%	56%	45%	57%	55%	60%	48%	63%	48%	59%	41%

Q.12 I will now read out a series of statements on the Circular Economy. Please tell me to what extent you agree with each statement.

Base: All respondents aged 16+ - 1,005

KEY LEARNINGS

A close-up photograph of a person's hands planting a small green seedling into dark, rich soil. The scene is set outdoors at sunset or sunrise, with warm, golden light illuminating the hands and the plants. In the background, other similar seedlings are visible in a field, slightly out of focus. A bright cyan diagonal graphic element is positioned in the bottom right corner of the slide.

Circular Economy National Survey: Summary

Despite another increase in name recognition, and broad consistency in national levels of overall support, understanding and interest in the Circular Economy are exhibiting a decline. The challenge now is to move to a new level of tailored communication: from awareness raising to strengthening understanding and relevance.

	Circular Economy			
	2021	2023	2024	2026
	%	%	%	%
'Heard of circular economy'	25	41	55	57
Know a little/ know a lot	23	31	38	40
Understand well (score 7-10)	35	39	46	37
Overall support (score 7-10)	57	64	61	62
Average familiarity (7-10)	50	58	57	55
Average Interest (7-10)	58	70	70	65
Priority for Government (high/ very high)	66	69	68	68
Priority for Irish Business (high/ very high)	67	71	70	71

Circular Economy National Survey Key Learnings

1

A backdrop of "Resigned Resilience" means people are emotionally disengaging from big, heavy topics like climate change.

2

National averages hide a growing urban/rural split, with rural Ireland disengaging while urban areas hold firm.

3

This divergence is creating a deep knowledge and interest gap, with the national decline driven almost entirely by the rural cohort.

4

The drop in ethically-minded behaviour is not universal; it is concentrated in the same rural and C2DE groups that are disengaging.

5

For everyone, the main roadblocks to action are the same: cost, convenience, and a lack of skills or local services.

Circular Economy National Survey Key Learnings

6

As personal motivation wanes, the public still has a high and unmet expectation for government and business to lead the way.

7

Despite fatigue, people still want to see action on concrete problems they can understand, like waste from Plastics, Clothing, and Electronics.

8

Current communication is failing to connect with the disengaged, particularly the rural audience where its effectiveness has reduced sharply.

9

In an age of scepticism, the most powerful influence comes from "proximity proof"—trusted friends, family, and local experts.

10

The growing divide means a single national strategy is no longer the best approach; engagement must be tailored to different audiences and their unique barriers.

THANK YOU



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