



Viridor: UK Recycling Index 2017

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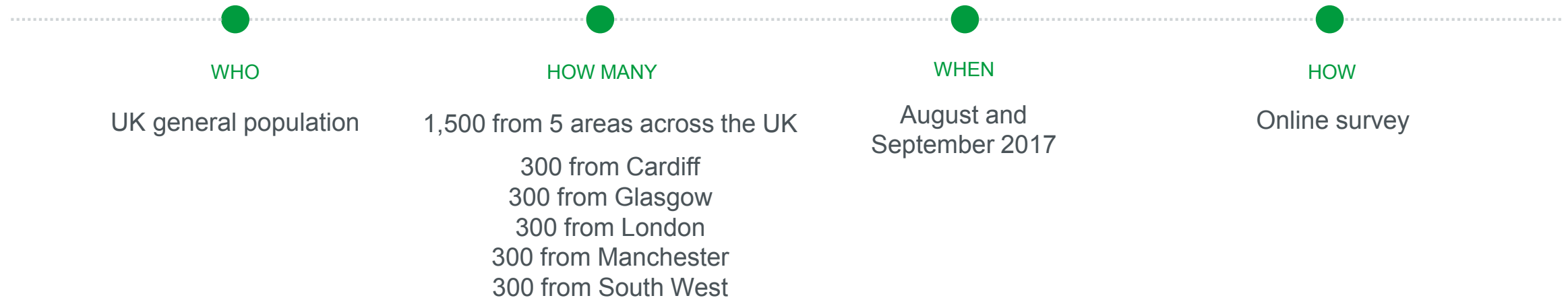
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Objectives and Methodology for 2017



Objectives

- Understand current attitudes to recycling including regional differences
- Understand the barriers that prevent UK consumers from increasing the amount of waste they recycle
- Understand the factors consumers believe can play a role in supporting them to increase the amount of waste they recycle
- To track shifts in opinion from the 2016 Index, and understand emerging areas of interest



2016 Findings



In 2016 Viridor launched the inaugural 'UK Recycling Index', a consumer study that explored:

- Current attitudes to recycling including differences by city or region
- The barriers that prevent the UK public from increasing the amount of waste they recycle
- The factors that the UK public believe can play a role in supporting them to increase the amount of waste they recycle

Key insights uncovered in the 2016 Index included:

- **Nearly two-thirds (63%)** of consumers were frustrated that different councils collect waste in different ways
- **Three-quarters (73%)** of the UK public said they would like more transparency on what happens to their waste
- **Only half (49%)** were very confident they put different waste in the right bins

In order to track changes in recycling over time and identify new trends impacting consumer behaviour, Viridor have undertaken the second edition of the 'UK Recycling Index'. The findings of this research are outlined in this presentation.

Considerations



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- In 2017, the Viridor UK Recycling Index included approximately 70% comparable content with the survey carried out in 2016, and 30% new content.
 - This allows Viridor to track key themes over time, as well as understand emerging areas of interest. The footnotes on each slide indicate whether questions are comparable or not, and where appropriate year on year differences have been called out.
 - Of note, where all 1,500 respondents have answered a comparable question, a difference of 4% points is statistically significant year on year, indicating there has been a shift in opinion. Where local regions (with 300 respondents) have been asked comparable questions, a difference of 8% points is statistically significant year on year.
-

Executive Summary



1. There has been an increase in public frustration that different councils recycle items in different ways, and fewer consumers are now confident they put their waste in the right bins.

- **Two-thirds (66%)** of UK consumers are now frustrated that different councils collect waste in different ways (this is an increase of 3% from 2016).
- Only **four in ten (43%)** are now very confident that they put different waste in the right bins (this has fallen by 6% from 2016).

2. There is confusion at a product level, with very few consumers finding recycling labelling on product packaging easy to understand.

- Less than **one in five (16%)** feel recycling labelling on product packaging is very easy to understand.

Executive Summary



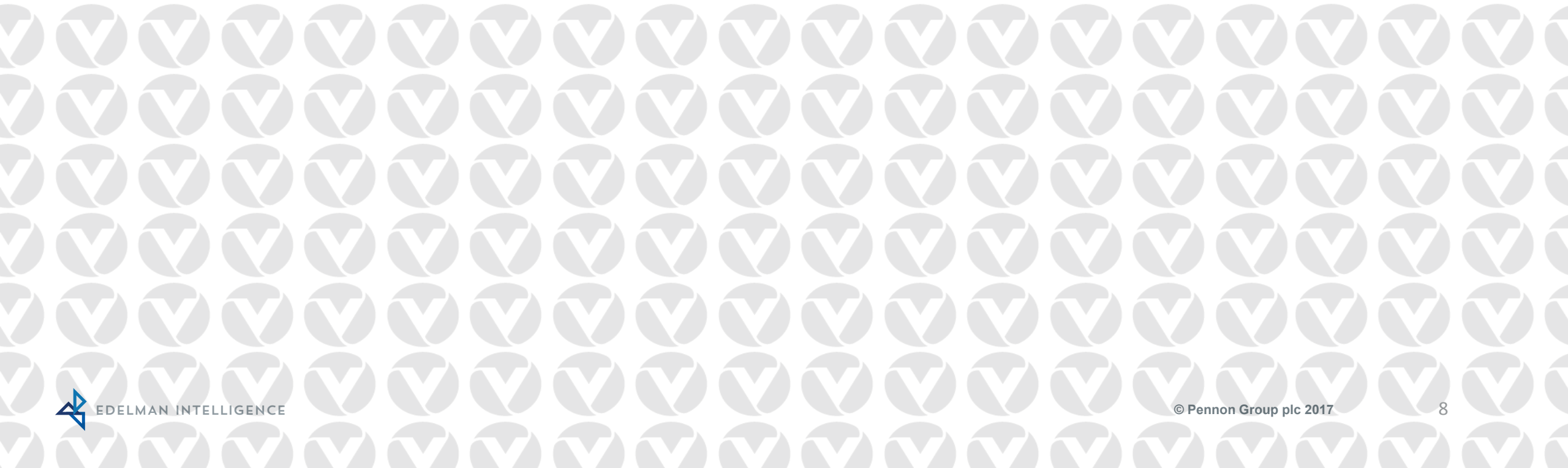
3. There continues to be a lack of trust in those perceived to be responsible for recycling.

- National government have a **43 point trust gap** between people who think they are responsible for recycling waste and those who trust them a great deal to ensure their waste is recycled properly. This is a six point increase since 2016.
- **Seven in ten (70%)** say tax payers are being held accountable for the cost of recycling products, whereas only **one in ten** believe product manufacturers (**10%**) and businesses (**9%**) are being held responsible.
- However, product manufacturers (**51%**) and businesses selling the product (**47%**) are seen as the two who should be responsible for paying the cost.

4. Consumers are open to initiatives that could lead to an increase in recycling levels.

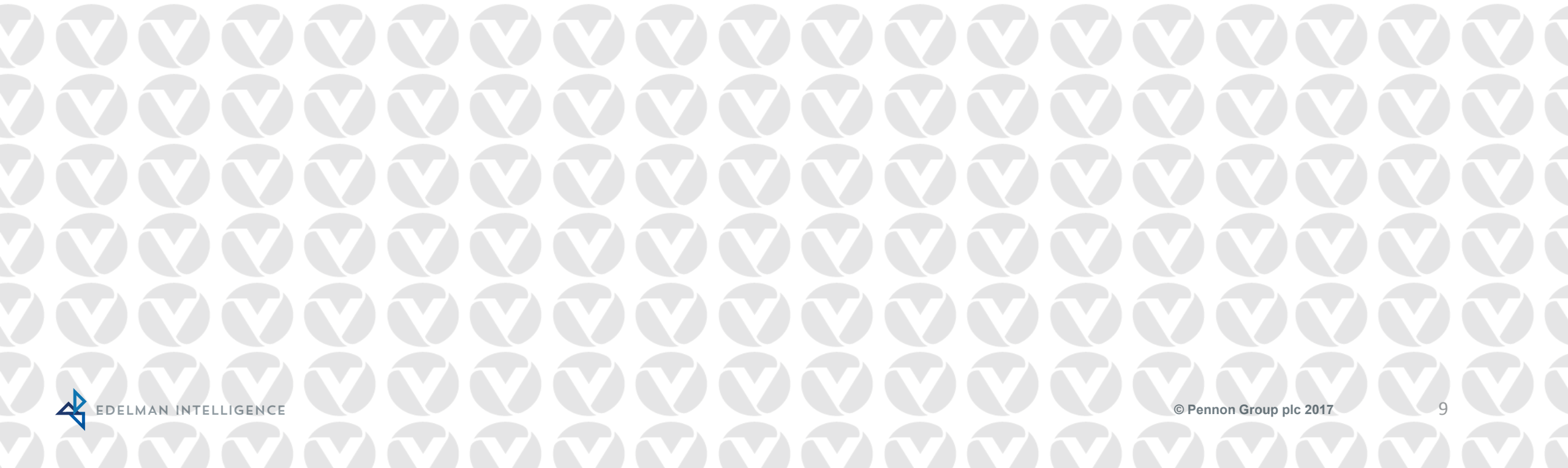
- **Seven in ten (69%)** would be willing to pay for a deposit return scheme. The products most would consider using a deposit return scheme for are glass bottles (**49%**), plastic bottles (**44%**) and batteries (**44%**).
- **Nine in ten (89%)** would consider using refillable packaging. However, **only a third (35%)** currently do, with the main barriers being a lack of awareness and availability. For example, **46%** of those who currently do not use refillable packaging say it is because not all shops / supermarkets offer the service.

Detailed Research Findings

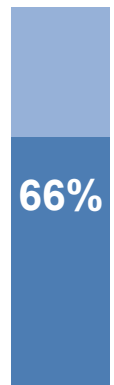


SECTION 1

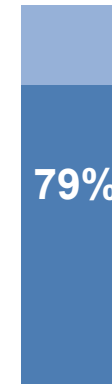
Current Attitudes to Recycling



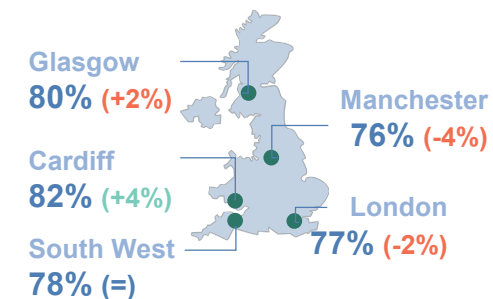
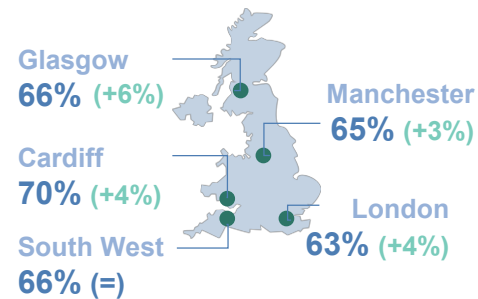
Recycling continues to be seen as making a very valuable contribution to the UK



2 in 3
believe recycling and waste management services make a very valuable contribution to the community
(+3% from 2016)



8 in 10
see waste as a valuable resource
(no change from 2016)



Q1. How valuable a contribution do you believe each of the following public services provide for communities in which they operate? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300) // Q4. How much do you agree or disagree with each of the following statements? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

Recycling is driven by a care for the environment and a care for others



Top three reasons why the UK public recycles

1

Because I care about the environment



2

Because everyone else in my local community recycles



=3

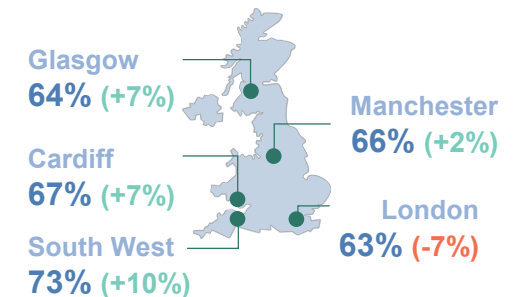
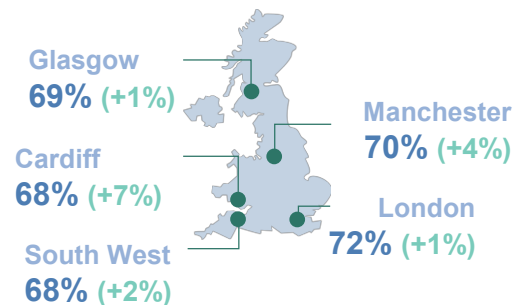
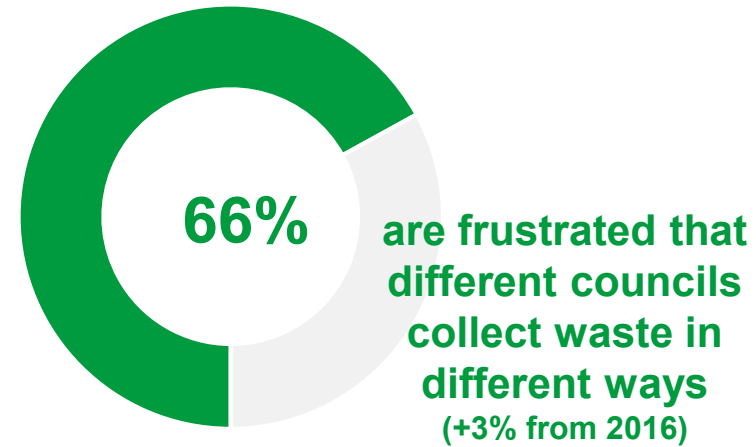
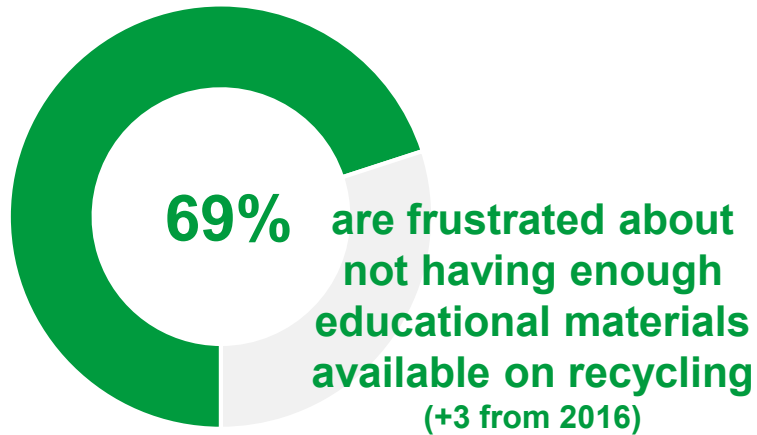
Because I want future generations to grow up in a world that is environmentally safe

and

Because I feel bad about throwing things away

Q17. Which of the following would you say are the top 3 reasons that you recycle? [Comparable] [Top Reason] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

There has been an increase in public frustration due to a lack of consistency and information on recycling

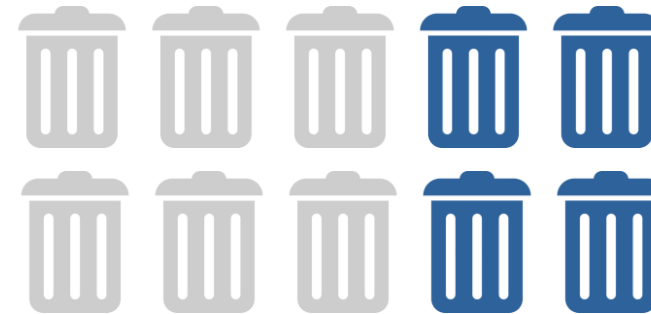
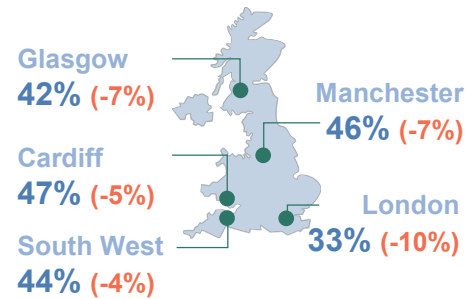


Q16. How frustrating, if at all, do you find each of the following are when it comes to recycling? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300) // Q7. How much you agree or disagree with each of the following statements? [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

Consumers are now less confident that they are putting their waste in the right bins

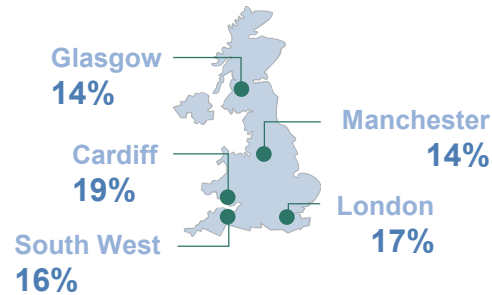
There has been a **six point decrease** in the number of UK consumers who feel very confident they put their waste into the right bins, showing there are growing levels of confusion.

Only
4 in 10 (43%)
consumers now feel very
confident they put different
waste in the right bins
(-6% from 2016)



Q8. How confident are you that you put all your different materials/waste in the right bins? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

And many are confused about what products are recyclable



Q4H: To what extent do you feel recycling labelling on product packaging is easy or confusing to understand? [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

Only half find it easy to tell whether black plastic food trays or disposable coffee cups are easy to recycle



% of UK consumers who say it is easy to tell whether each item is recyclable

	UK	Cardiff	Glasgow	London	Manchester	South West
Tyres	33%	31%	30%	35%	38%	32%
Light bulbs	36%	38%	34%	37%	38%	31%
Crisp packets	44%	48%	45%	48%	45%	37%
Mobile phones	46%	48%	45%	48%	45%	47%
Plastic wrapping	49%	56%	45%	54%	44%	44%
Disposable coffee cups	49%	57%	46%	51%	44%	49%
Black plastic food trays (i.e. fruit / veg trays, ready meal trays etc.)	49%	52%	47%	54%	49%	42%
Ready meal packaging	50%	59%	47%	51%	46%	49%
Disposable plastic bags	55%	61%	50%	59%	54%	50%
Batteries	60%	61%	56%	59%	58%	64%
Plastic packaging (e.g. pots, tubs, trays etc.)	62%	72%	55%	64%	54%	65%
Juice cartons	68%	70%	64%	70%	71%	66%
Old clothes	69%	68%	68%	69%	66%	76%
Magazines	85%	88%	82%	82%	86%	86%
Plastic bottles	85%	92%	82%	81%	86%	86%

Q9: How easy or difficult do you find it to tell whether each of the following items is recyclable? [Not Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

Plastic items are considered the most polluting household items



Items the UK public believe are most polluting:

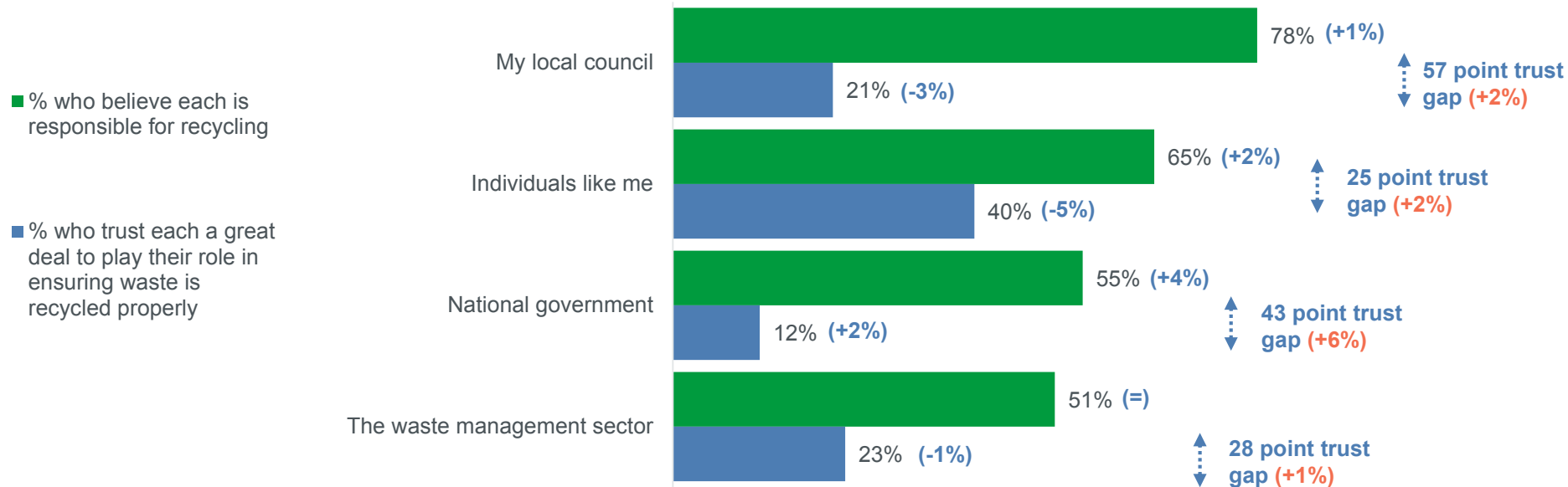
		UK	Cardiff	Glasgow	London	Manchester	South West
1	Plastic wrapping	48%	45%	51%	45%	50%	50%
2	Batteries	46%	49%	49%	43%	45%	46%
3	Plastic packaging (e.g. pots, tubs, trays etc.)	42%	31%	42%	41%	55%	41%
4	Disposable plastic bags	40%	39%	41%	38%	42%	38%
5	Plastic bottles	37%	32%	39%	38%	38%	38%
6	Tyres	34%	38%	37%	30%	32%	33%
7	Black plastic food trays (i.e. fruit / veg trays, ready meal trays etc.)	33%	34%	33%	27%	34%	36%
8	Wet wipes	32%	36%	32%	28%	27%	39%
9	Ready meal packaging	22%	24%	16%	21%	26%	22%
10	Mobile phones	21%	21%	23%	23%	16%	22%
11	Disposable coffee cups	19%	22%	16%	24%	14%	20%
12	Crisp packets	17%	20%	12%	17%	17%	18%
13	Light bulbs	15%	13%	16%	17%	14%	14%
14	Cotton buds	14%	19%	13%	13%	6%	16%
15	Aluminium cans	9%	10%	8%	14%	7%	7%

Q4A: What do you think are the most polluting household items? (please select the 5 items from the list that you believe are the most polluting) [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

There continues to be a lack of trust in those perceived to be responsible for recycling

There is a lack of trust in the groups who are perceived to be responsible for recycling, as the UK public does not believe these groups will ensure waste is recycled properly. Local councils and national government suffer this gap most acutely.

Trust gap for groups seen as responsible for recycling

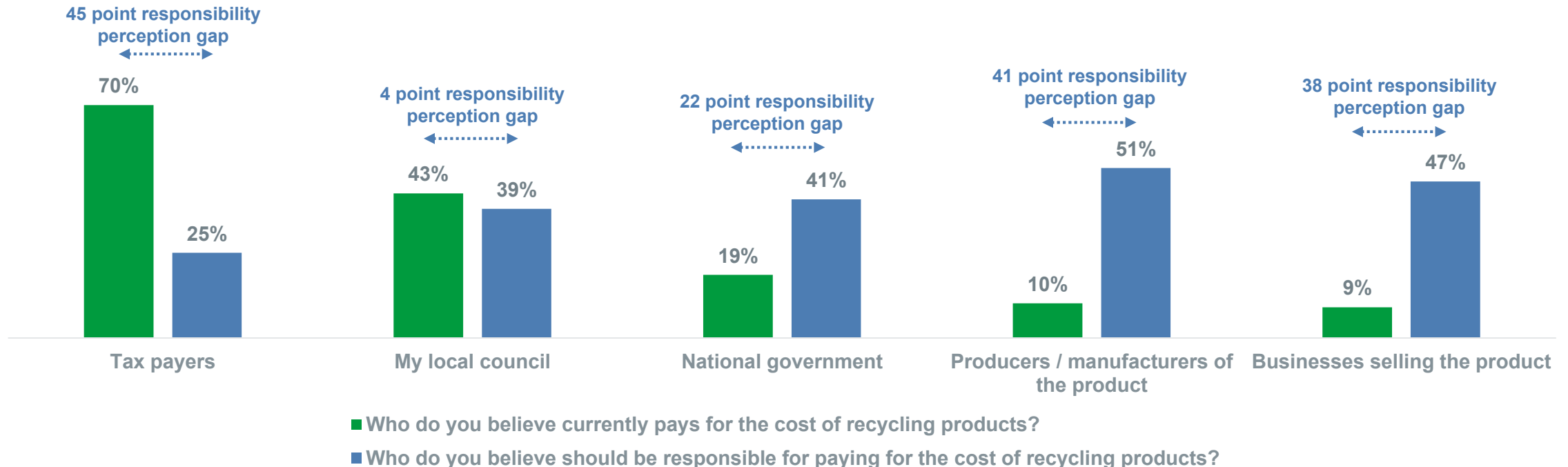


Q2. Who do you believe should be responsible for making sure rubbish and waste is recycled in the UK? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300) // Q3. How much do you trust each of the following people / organisations to play their role in ensuring waste is recycled properly? [Comparable] [Trust a great deal] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

Many believe product manufacturers and businesses should contribute more to the cost of recycling



Seven in ten believe tax payers are being held accountable for the cost of recycling products, but believe the product manufacturers and businesses selling the product should be paying this cost. This shows the general public believe responsibility lies at the start of the product life.

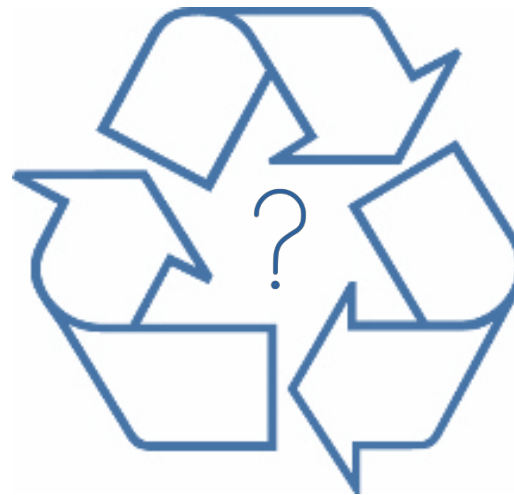
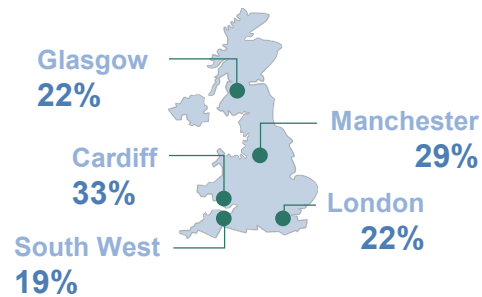


Q6J: Who do you believe currently pays for the cost of recycling products? [Not comparable] Base: All respondents (1,500) // Q6K: And who do you believe should be responsible for paying for the cost of recycling products? [Not comparable] Base: All respondents (1,500)

And very few consumers believe that all waste that can be recycled is recycled

Only a quarter of consumers currently believe that all their waste that can be recycled is recycled. This lack of belief could add to the UK public's feeling for distrust and uncertainty towards the sector.

Only **25%** believe that all waste that can be recycled, is recycled

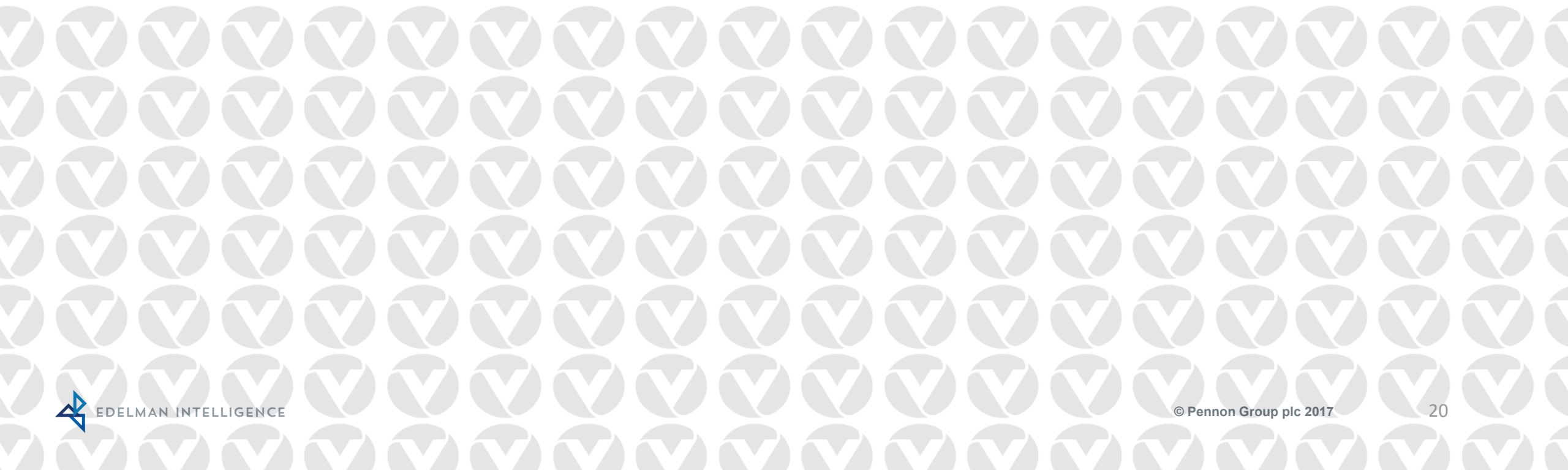


This figure drops to less than one in five (**19%**) for the South West.

Q13L: What do you think happens to your waste once it is taken away? (please select which statement best reflects your opinion) [Not comparable] Base: All respondents (1,500) // Q6K: And who do you believe should be responsible for paying for the cost of recycling products? [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

SECTION 2

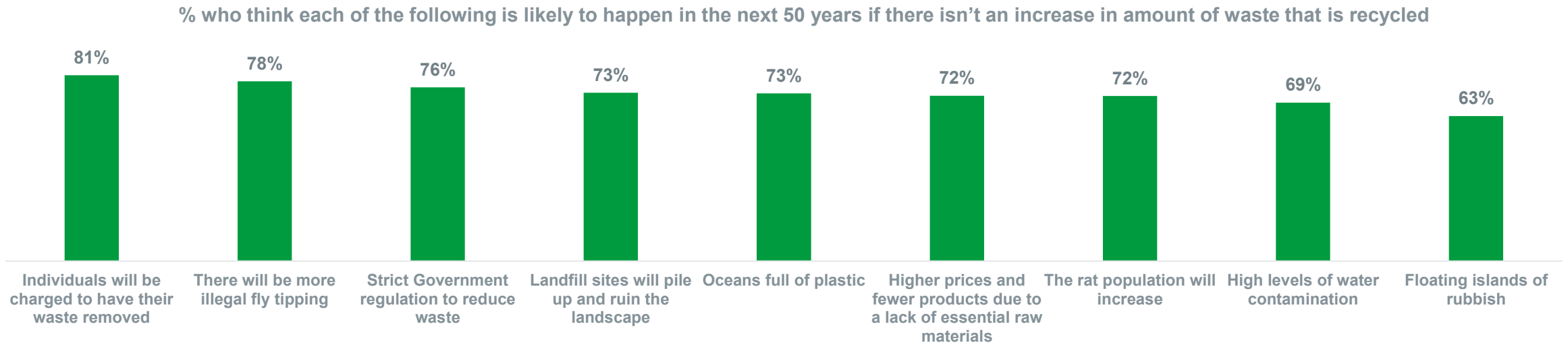
The Consequences of Not Increasing Recycling Levels



The majority of the public foresee a number of negative consequences if recycling levels do not increase



UK consumers believe there will be a number of negative consequences in the next 50 years if there is not an increase in the amount of waste that is recycled or used to create energy. For example, **three-quarters (73%)** of the public believe it is likely there will be **oceans full of plastic** and **seven in ten (69%)** believe **high levels of water contamination** are likely.



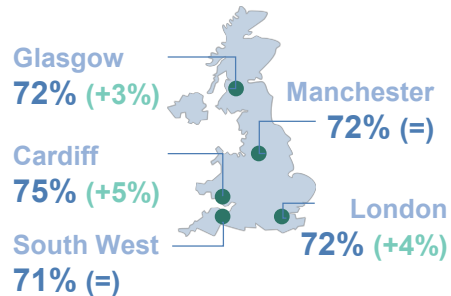
Q22A: I'd now like you to imagine the UK in 50 years. How likely or unlikely do you think it is that each the following could happen if there isn't an increase in the amount of waste that is recycled or used to create energy? [Not comparable] Base: All respondents (1,500)

And more consumers are now recognising the value of waste management careers



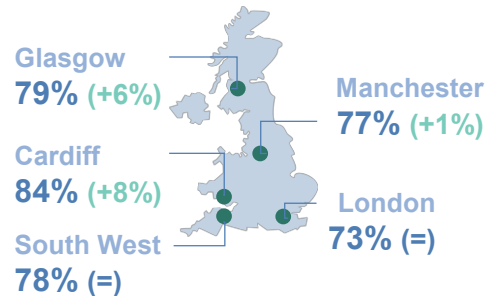
72%

agree that the **best minds are required to tackle modern issues** of recycling and waste management in the UK
(+2% from 2016)



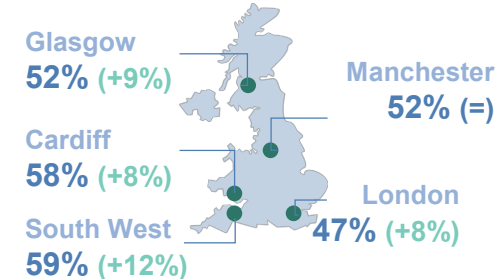
78%

believe that **careers in recycling are just as important** as careers in gas, electricity and water services
(+3% from 2016)



54%

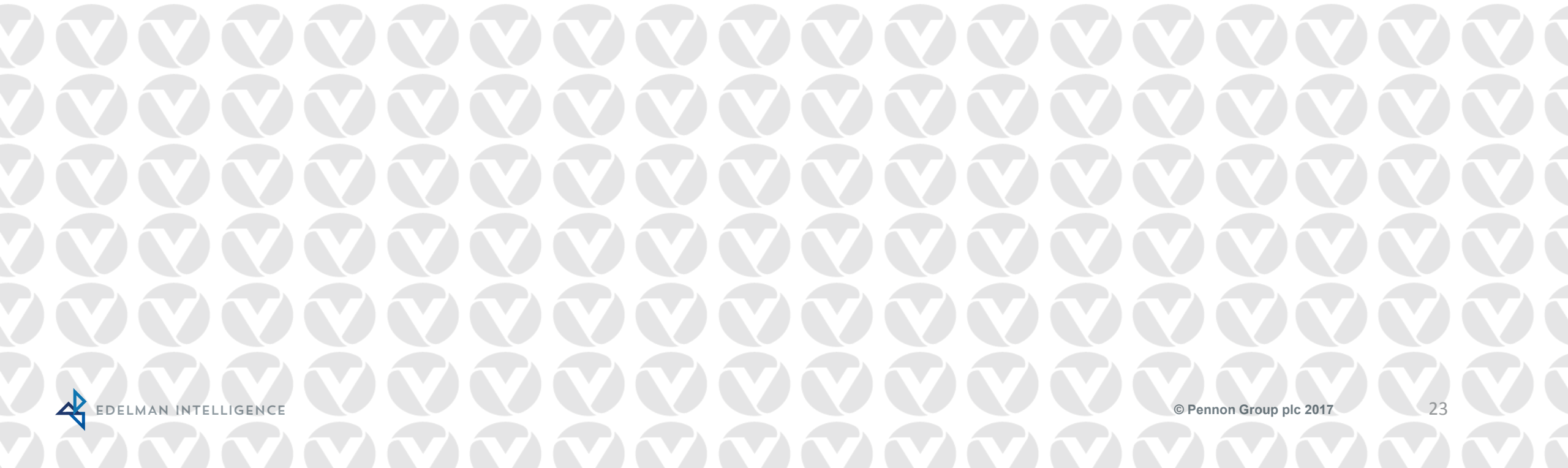
associate the word “essential” with a career in recycling
(+8% from 2016)



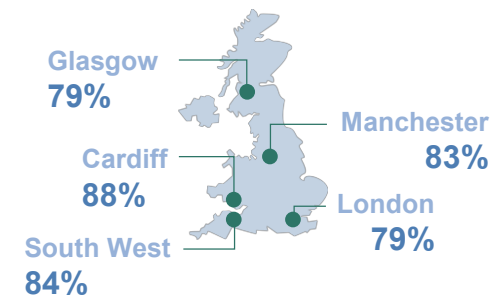
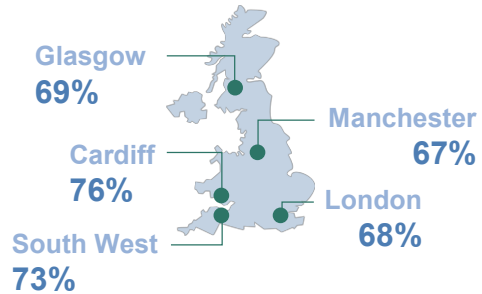
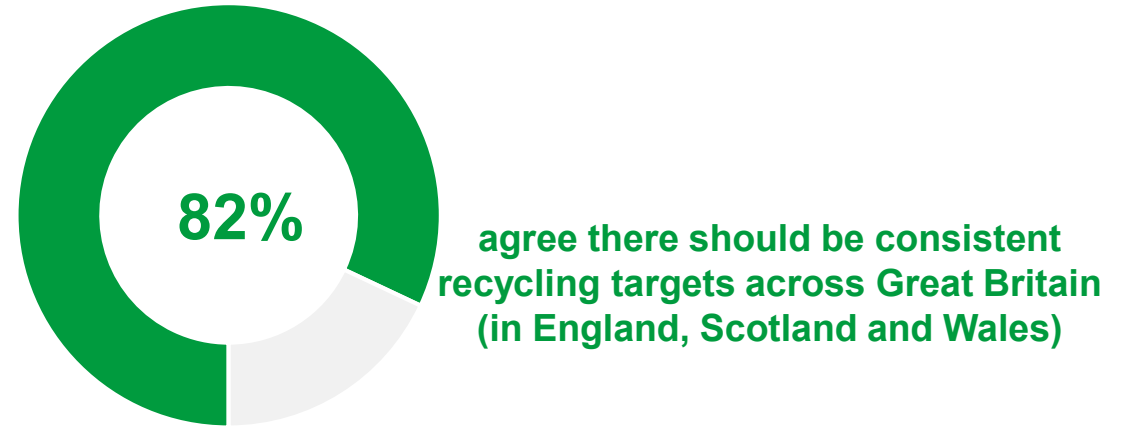
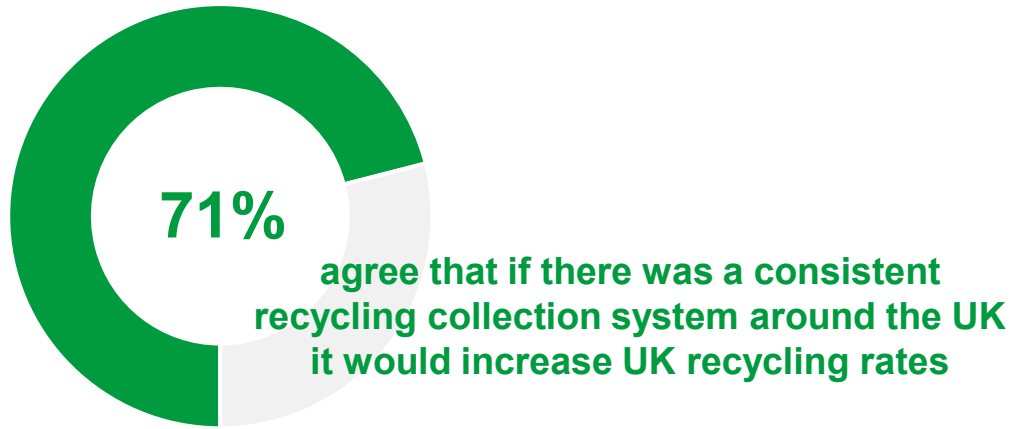
Q29. How much do you agree or disagree with each of the following statements? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300) // Q27: Which of the following words or phrases would you associate with a career in recycling? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

SECTION 3

The Future of the Recycling Industry



The UK public want more standardisation across the recycling industry



Q26: How much do you agree or disagree with each of the following statements when thinking about recycling now and in the future? [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

Nearly half feel England could adopt a more ambitious waste target, bringing it in line with the EU



45% feel that England's target to recycle 50% of all waste by 2020 is not ambitious enough. This suggests there is a desire for the UK to adopt a larger target, more in line with the EU.



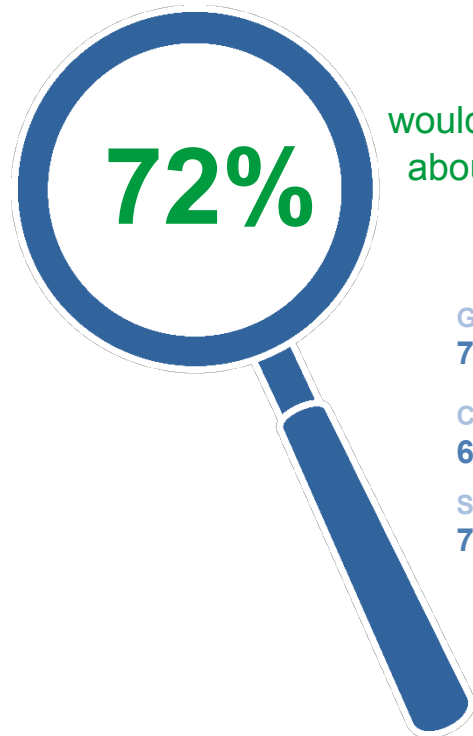
45% believe England's target to recycle **50% of all waste by 2020 is not ambitious enough**



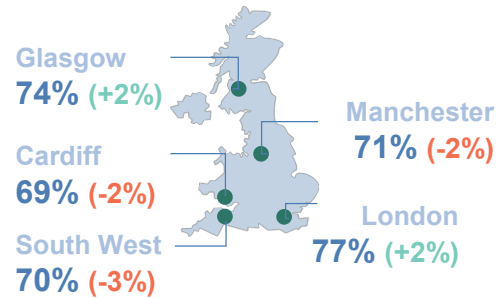
Whereas only **13%** of the UK public feel **the EU's target to recycle 70% of all waste by 2020 is not ambitious enough**

Q6I: Waste targets in the UK and Europe vary, and are as follows: How ambitious do you think these targets are? [Not comparable] Base: All respondents (1,500)

There is continued demand for more transparency on the outcomes of recycling and waste management

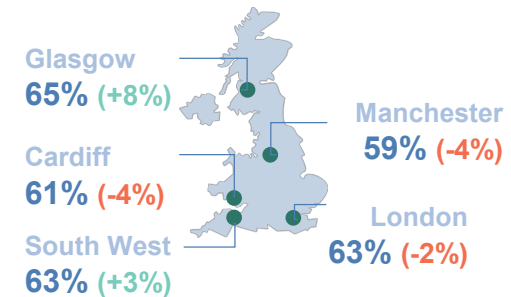


would like **more transparency** about what happens to their waste (-1% from 2016)



62%

say it's important that they know what happens to their waste (no change from 2016)



Q4. How much do you agree or disagree with each of the following statements? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

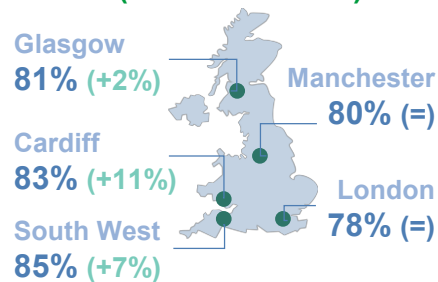


There is an increase in the number of people who say knowing what happens to their waste would encourage them to recycle more



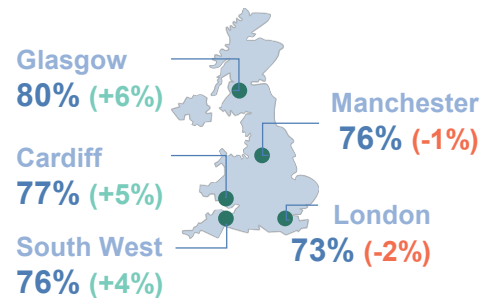
81%

would be encouraged to **recycle more** if they could see that **money saved from 'waste' services** was being **spent on services like schools, road repairs and social care**
(+4% from 2016)



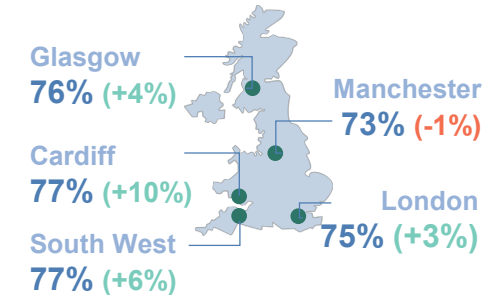
77%

would be encouraged to **recycle more** if they **knew it would create jobs in their local area**
(+3% from 2016)



75%

would be encouraged to **recycle more** if they knew how their recycling was having an **impact on the wider environment**
(+4% from 2016)



Q18. Which of the following would encourage you to recycle more of your household waste? [Comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300).

Consumers are open to initiatives that can increase recycling levels



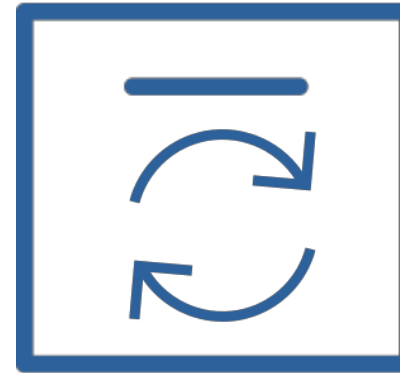
Deposit return scheme



For the purposes of this study, a deposit return scheme was defined as below:

“A deposit return scheme is where you would pay a small sum when purchasing a product which is then given back to you when you return the packaging”

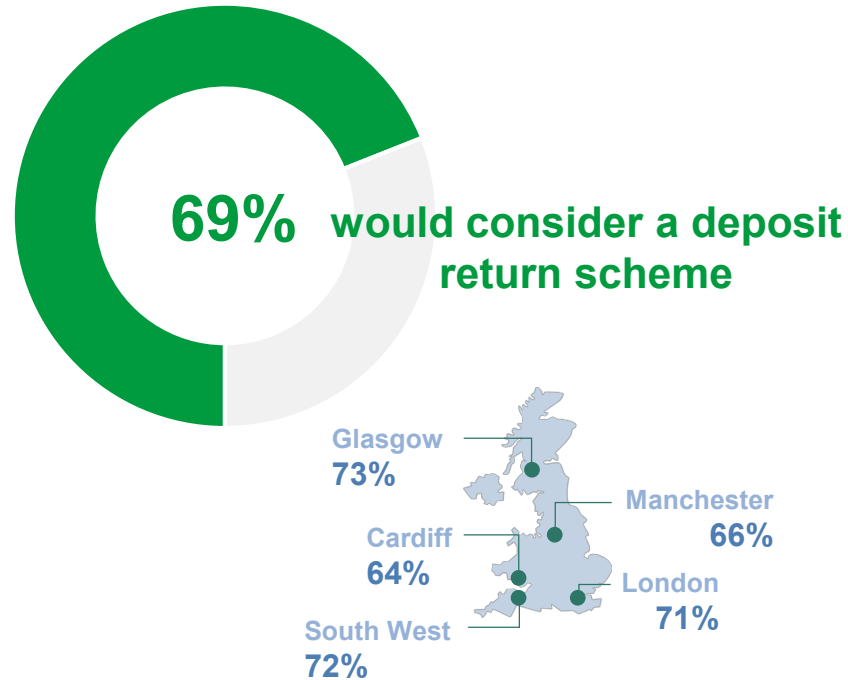
Refillable packaging scheme



For the purposes of this study, a refillable packaging scheme was defined as below:

“Refillable packaging is where you would only buy the product inside, not the packaging or container, so you would fill up your existing packaging or container in store”

7 in 10 would be willing to pay for a deposit return scheme



% of UK consumers who would consider a deposit return scheme for each item

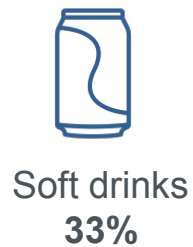
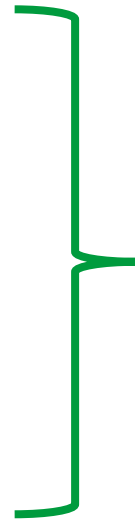
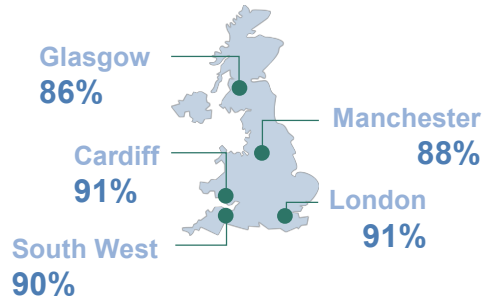
	UK
Glass bottles	49%
Plastic bottles	44%
Batteries	44%
Aluminium cans	37%
Mobile phones	35%
Light bulbs	31%
Disposable plastic bags	26%
Coffee cups	24%
Black plastic food trays (i.e. for fruit / veg/ ready meals etc.)	24%
Juice cartons	21%
Magazines	20%
Crisp packets	18%
Wet wipes	14%
Straws	13%
Cotton buds	11%

Q4B: Would you be willing to pay for a deposit return scheme for any of the following products? (A deposit return scheme is where you would pay a small sum when purchasing a product which is then given back to you when you return the packaging)
 [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

And nearly all of the UK public are open to using refillable packaging

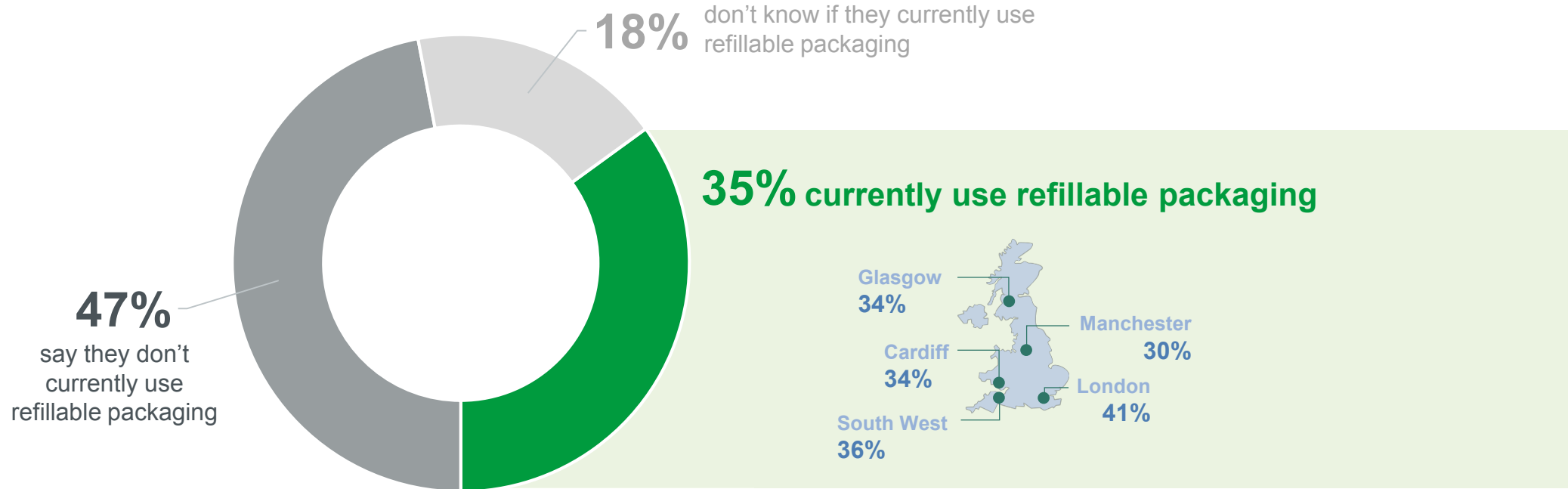


89% would consider using refillable packaging



Q4E: Which of these products would you consider using refillable packaging for? [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

However, only 1 in 3 currently use refillable packaging



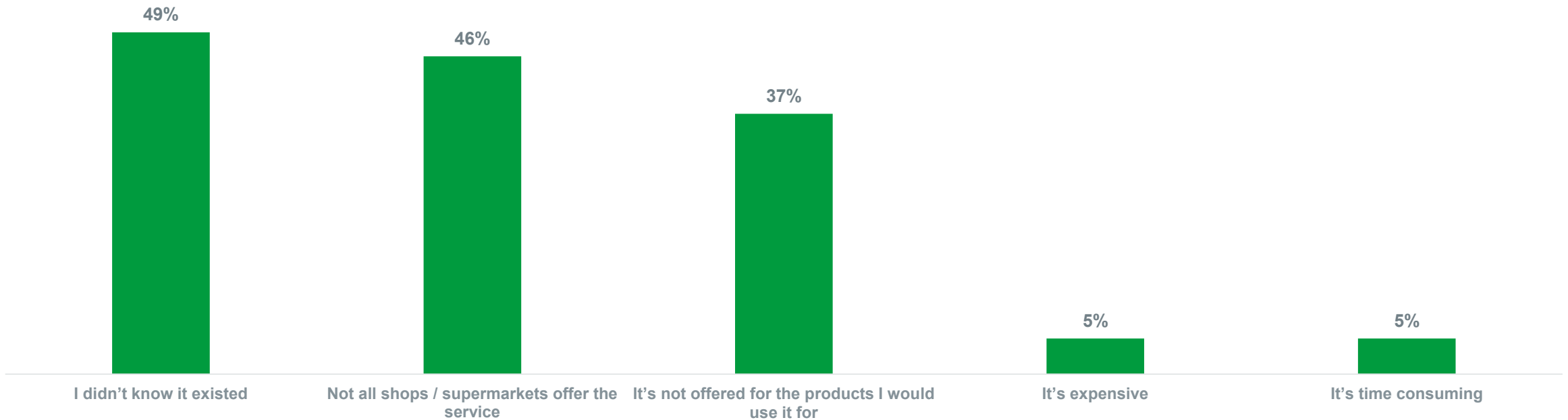
Q4C: Do you currently use refillable packaging? Refillable packaging is where you would only buy the product inside, not the packaging or container, so you would fill up your existing packaging or container in store. [Not comparable] Base: All respondents (1,500), Cardiff (300), Glasgow (300), London (300), Manchester (300), South West (300)

Awareness and accessibility are the main barriers to consumer uptake for refillable packaging



Of those who currently don't use refillable packaging, the top three barriers are **awareness** (not knowing refillable packaging existed) and **accessibility** at a store and product level. Cost and time are not seen as major barriers to using refillable packaging.

% who state the following as reasons for not currently using refillable packaging



Q4D: Why do you not currently use refillable packaging? [Not comparable] Base: Those say they don't currently use refillable packaging (703)



Thank You