

Viridor **UK Recycling Index 2018**

Prepared by Edelman Intelligence



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Detailed Research Findings

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Objectives & Methodology 2018

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 2017 Index, and understand emerging areas of interest

Methodology

WHO 1,879 UK general population – regionally representative sample

HOW Online survey

WHEN July & August 2018

2017 Findings (Recap)

Increase in public frustration that different councils recycle in different ways, fewer consumers were confident they put their waste in the right bins.

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

Very few consumers find recycling labelling on product packaging easy to understand.

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

A continued lack of trust in those perceived to be responsible for recycling.

- National government had 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 - a six point increase since 2016
- **Seven in ten (70%)** said tax payers are being held accountable for the cost of recycling products, whereas only **one in ten** believed product manufacturers (**10%**) and businesses (**9%**) are being held responsible
- Product manufacturers (**51%**) and businesses selling the product (**47%**) were seen as the two who should be responsible for paying the cost

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

- **Seven in ten (69%)** were willing to pay for a deposit return scheme. Products most considered were glass bottles (**49%**), plastic bottles (**44%**) and batteries (**44%**)
- **Nine in ten (89%)** would consider using refillable packaging, however, **only a third (35%)** did in 2017

Considerations

- To allow Viridor to track key themes over time as well as understand emerging areas of interest, in this year's study we have included 70-80% of comparable content with the 2017 survey.
- The footnotes on each slide indicate whether questions are comparable or not, and where appropriate year on year differences have been called out.
- Where all respondents (1879) have answered a comparable question, a difference of around 4% points is statistically significant year on year, indicating there has been a shift in opinion.

2018 Findings

Public concern about plastic waste and ocean pollution has risen in the last year, suggesting a growing worry that the recycling industry should take note of

- **Eight in ten (82%)** are worried about plastics in the ocean
- **Seven in ten (71%)** think it's likely that there will be floating islands of rubbish in the UK in the next 50 years if there isn't an increase in the amount of waste that is recycled or used to create energy – an increase of 37pts from 2016 and an 8pt increase from 2017
- Plastic wrapping is still seen as the most polluting household item but there is a significant rise in consumers who see straws (+19pts since 2017) and cotton buds (+6pts since 2017) as pollutants

There is confusion and scepticism around recycling, with consumers demanding more transparency. There is a clear need for companies, such as Viridor, to provide information and reassurance

- Only **16%** of consumers think that all waste that can be recycled is recycled – a decrease of 9pts from 2017
- **Four in ten (41%)** think that even though people separate their recyclable and non-recyclable waste, it all goes to the same place – up 8pts from 2017, up 6pts from 2016
- **72%** are frustrated about not knowing what can be recycled – up 5pts from 2017, up 8pts from 2016
- **78%** would like more transparency about what happens to their waste – up 6pts from 2017, up 5pts from 2016

2018 Findings

Trust remains low in the organisations responsible for recycling waste properly, but at the same time, consumers expect more from them

- There is greater expectation this year that the government, waste management sector, and businesses are responsible for recycling. However, trust in these organisations to make a difference remains low
- **72%** are frustrated about not having enough educational materials available on recycling – up 3pts from 2017, up 6pts from 2016

In the last year, consumers have become more open to recycling initiatives, yet there is still the challenge to turn this willingness into action

- **78%** would consider a deposit return scheme – up 9pts from last year
- And approximately **45%** are willing to pay tax on non-recyclable plastics

There is a need for a more holistic approach to waste management from business, government, and the waste management sector, and there is an opportunity for Viridor to be a key player in ensuring this happens

- There is the expectation that business should be factoring recycling into their packaging – **61%** of consumers say that they are more likely to buy products with packaging made from recyclable material
- Standardised packaging is seen as the most effective initiative to encourage consumers to recycle more (**53%**)
- The public believes that the country should be more accountable for the waste it produces – 80% say the UK should find a way to deal with its own recycling without having to export it to other countries

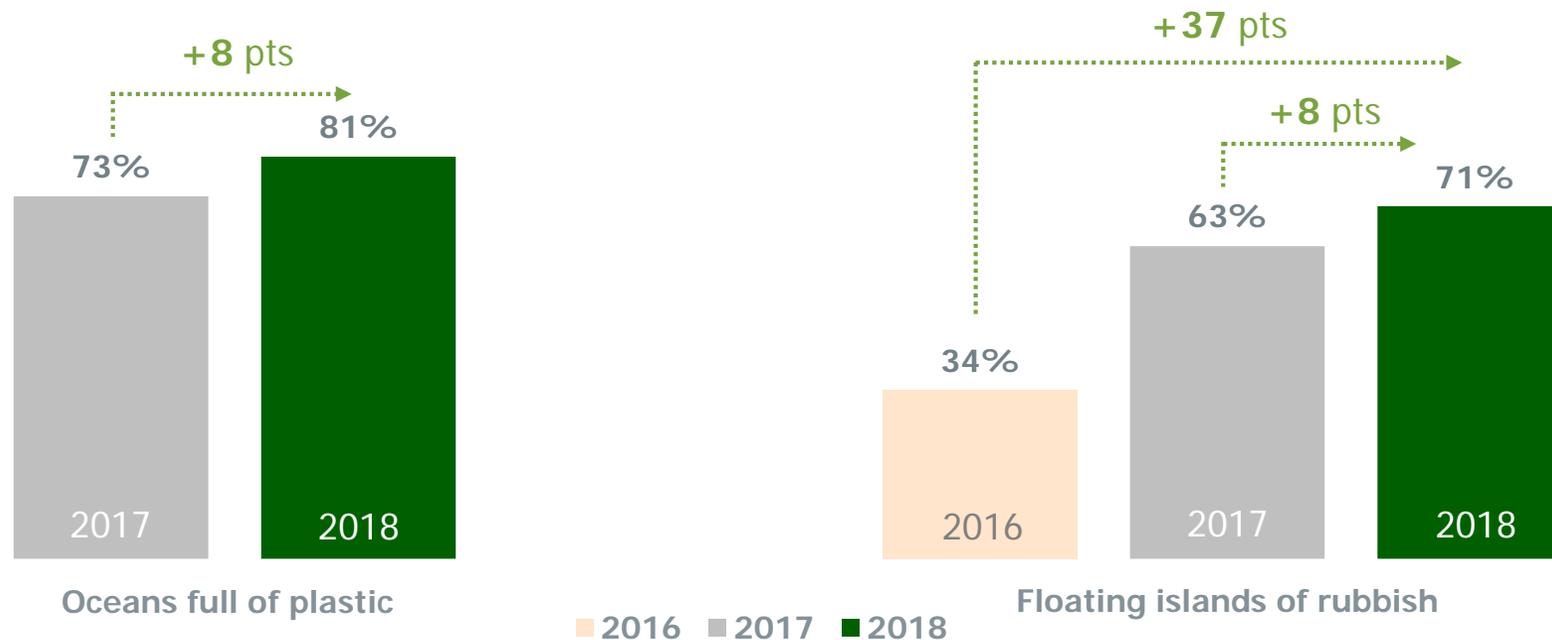
Section 1

The recycling landscape

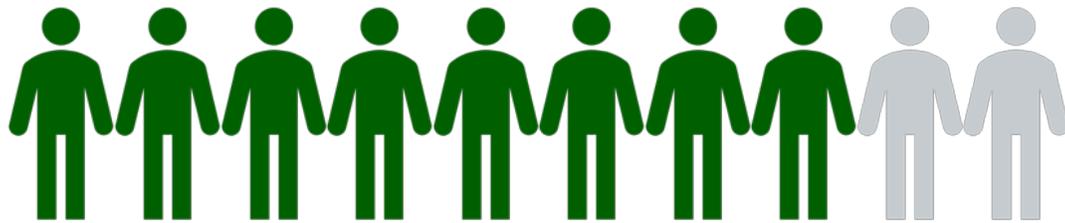


Public interest in the issue of plastic waste gains momentum

Perceived likelihood of the following scenarios happening in the UK in the next 50 years



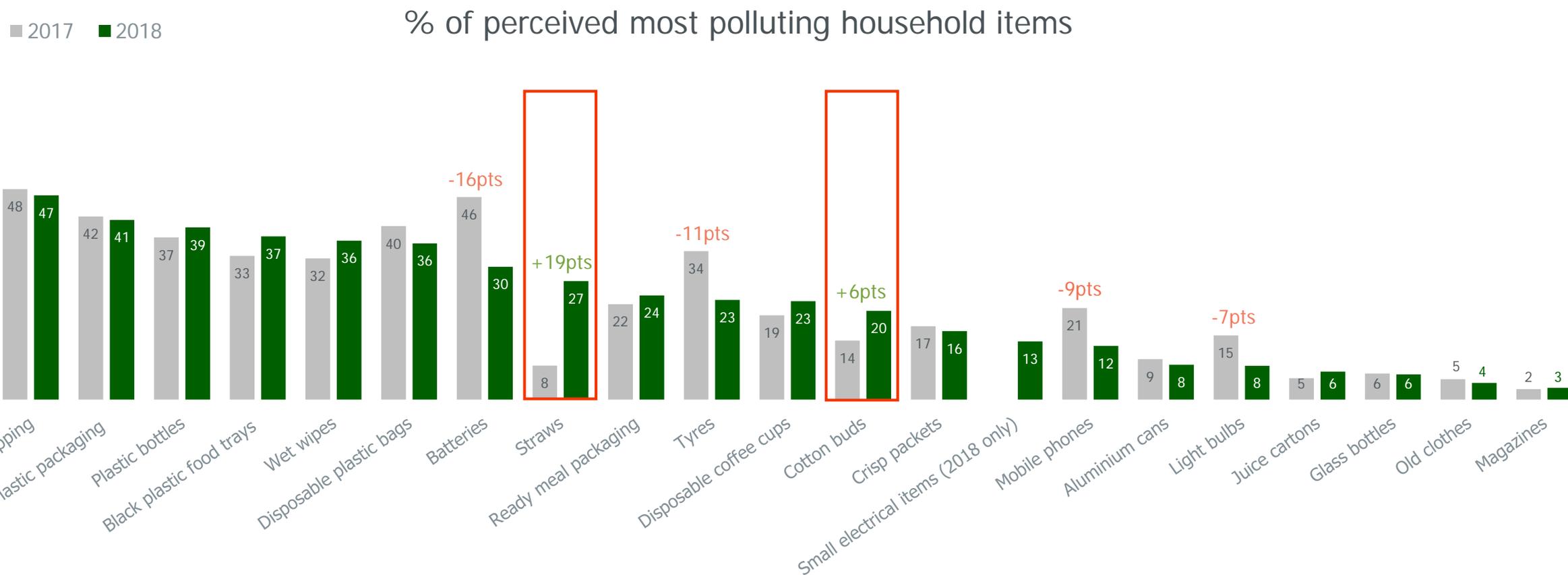
Plastic pollution is one of consumers' top concerns



82%

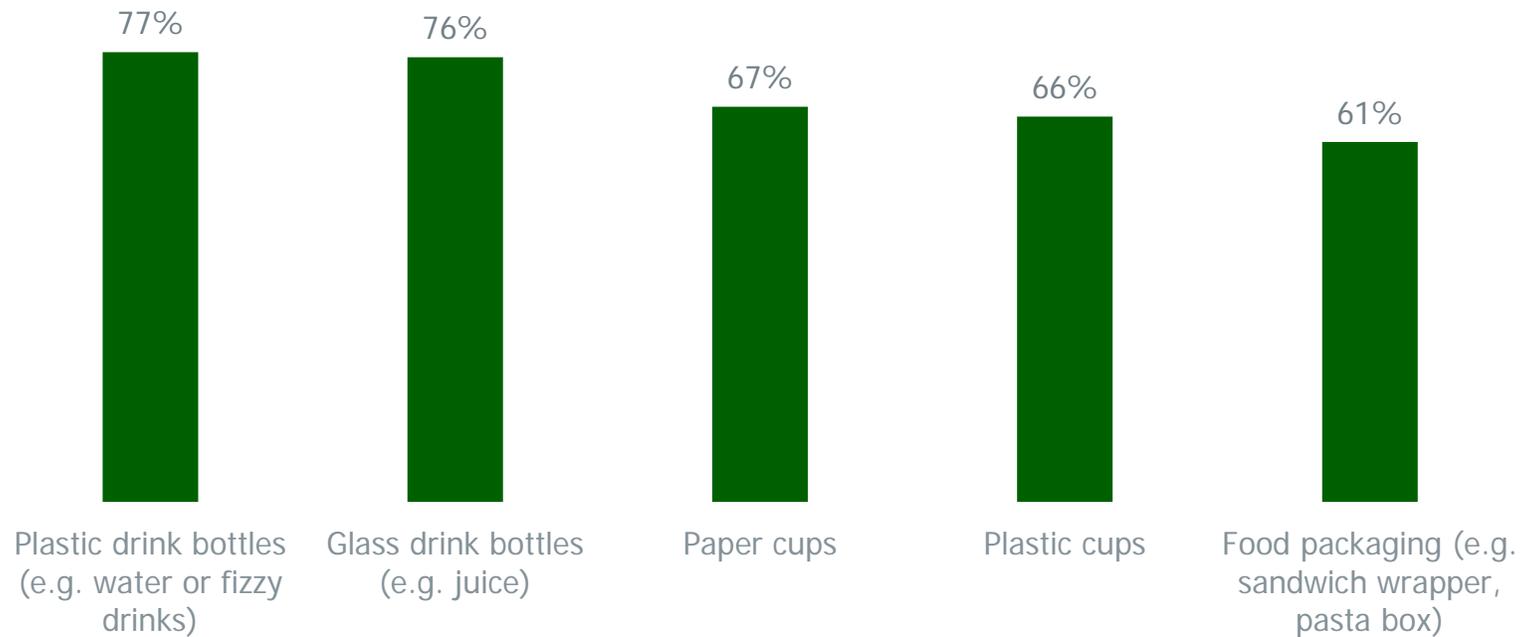
say they are **worried** about **plastics** in the **ocean**

Plastic wrapping is still seen as the most polluting household item, however there is an uplift in cotton buds and straws seen as pollutants



Concern about plastic is reflected in recycling habits, and plastic drinks bottles are the most likely item to be recycled

% of consumers who say they are likely to recycle the following when they are not at home or at work

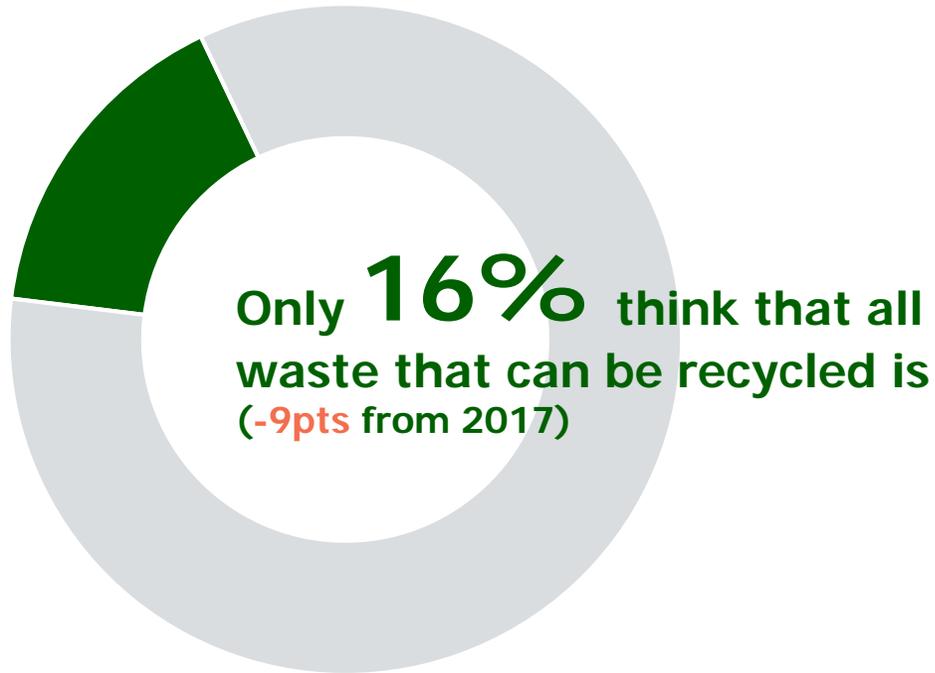


Section 2

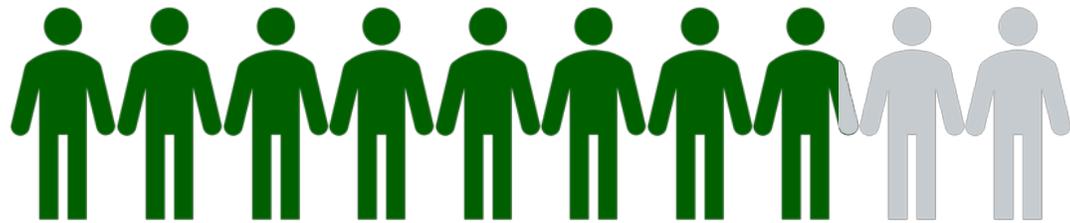
Changing attitudes towards recycling



Consumers are more sceptical of what happens to their waste



There is rising consumer demand for transparency in the recycling process



78%

would like **more transparency** about what happens to their waste
(+6pts from 2017, +5 from 2016)



67%

says it's **important** that they know **what happens to their waste**
(+5pts from 2017, +5 from 2016)

There is continued frustration in the lack of information on recycling, and increased frustration about not knowing what can be recycled



Despite media attention on the subject, many do not know how much of the UK's waste is recycled



2 in 5
don't know what
proportion of the UK's
waste is exported

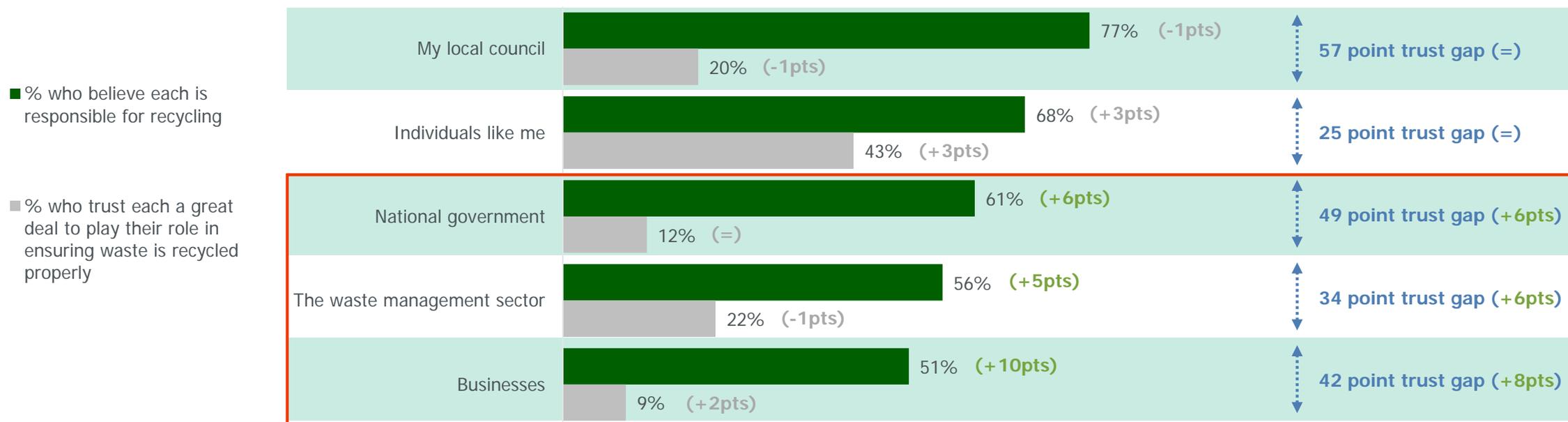
Section 3

Call for a more holistic approach to recycling

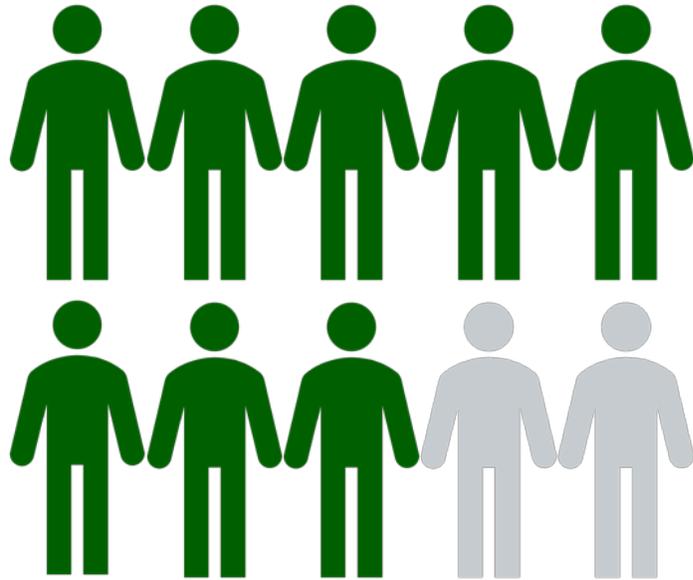


Trust in recycling influencers remains low, yet consumers' expectations of them have increased

The trust-expectation gap has increased. Consumers expect more from **businesses**, the **government** and the **waste management sector** – suggesting need for a more **holistic approach to recycling**.



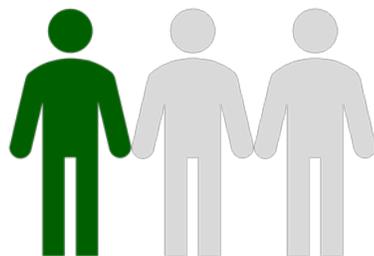
There is an expectation that the UK should be accountable for its own waste



8 in 10 (80%)
say the **UK** should find a way
to **deal with its own**
recycling without
having to export it to
other countries



Consumers expect innovation from businesses and the waste management industry to tackle waste



more than **1 in 3**

agree that
“the recycling industry will
become **redundant** in the future as
waste will be ‘**designed out**’
of products”

(35%; +5pts from 2017)



There is evidence that if businesses were to adopt standardised practises, consumers would recycle more

Initiatives which would encourage consumers to recycle more



Products with recyclable packaging, or packaging made from recyclable materials, are seen as more attractive purchases



There is also indication that consumers want to play a greater role in recycling themselves

Significantly more consumers are open to deposit return schemes that last year



% of consumers who would consider a deposit return scheme for:

Glass bottles	54%
Plastic bottles	53%
Batteries	43%
Aluminium cans	40%
Mobile phones	35%
Small electrical items (e.g. hairdryers, toasters)	33%
Coffee cups	32%
Light bulbs	31%
Disposable plastic bags	30%
Black plastic food trays (i.e. fruit / veg trays, ready meal trays etc.)	29%
Juice cartons	27%
Crisp packets	22%
Magazines	21%
Straws	19%
Wet wipes	16%
Cotton buds	14%

Many are willing to pay a tax on non-recyclable plastics

% of consumers willing to pay tax on the following non-recyclable plastics:



Plastic drink bottles

47%



Plastic takeaway containers

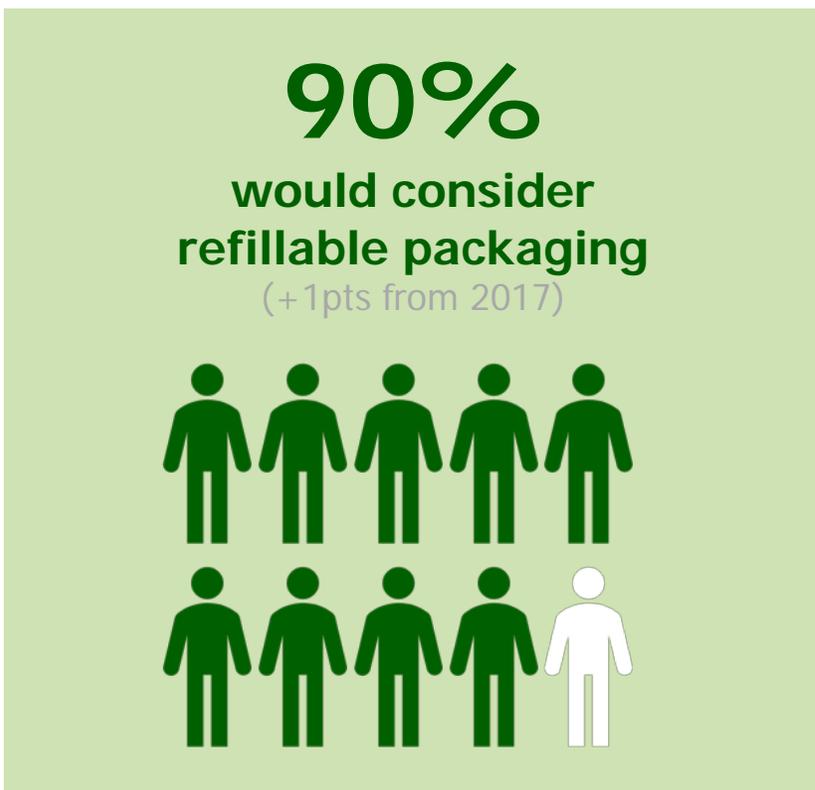
45%



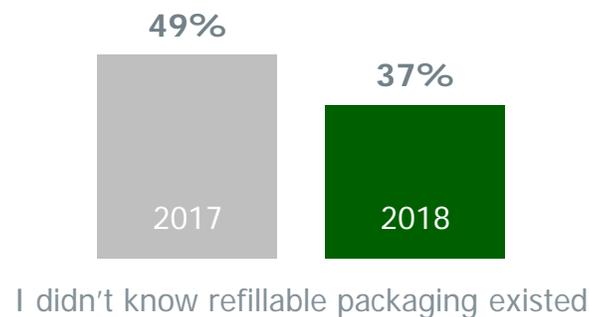
Black plastic food trays

44%

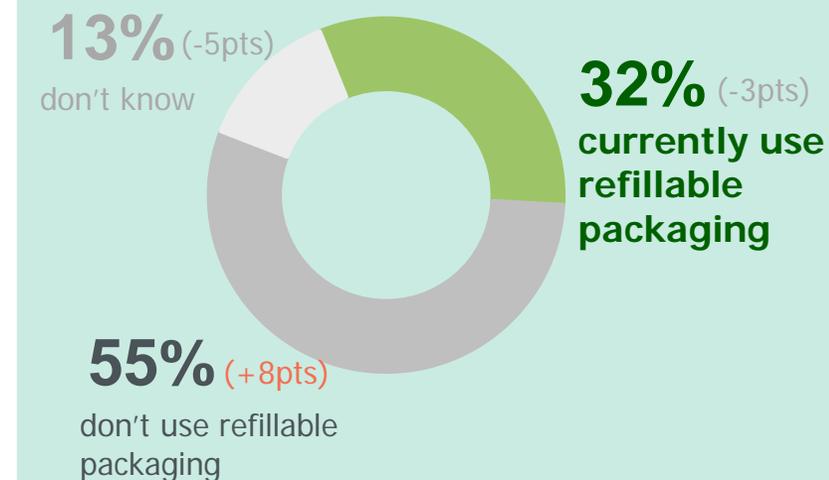
Although usage and willingness to use refillable packaging remains the same, awareness is up from 2017



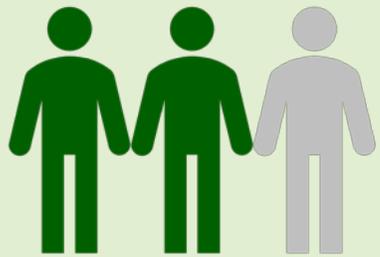
Awareness up by 12pts



Usage remains static



Recycling services continue to be seen as making a very valuable contribution in the UK, although with consumers' increased expectations of the industry, it will be imperative to have more information and transparency



2 in 3

believe **recycling and waste management** services make a very **valuable contribution** to the community
(65%; -1pts from 2017)



Thank you

