

Every Can Counts Retail Whitepaper Phase Two

2015



Behavioural change
communication
programmes in the
retail sector:

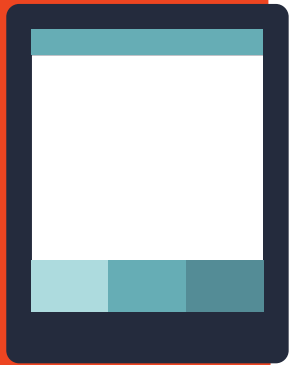
Every Can Counts
and UK shoppers

Every Can Counts

Introduction:

Following our detailed interviews with industry experts in the spring of 2014 to explore the views of shopping centre bosses on the importance of recycling in the retail sector, we took to the streets to find out what shoppers themselves think about recycling and the facilities that are available when they head to their local shopping centre.





Executive Summary

This report provides an analysis and evaluation of UK shoppers' recycling habits 'on the go'. A sample of 810 adults were surveyed in two shopping centres, giving insight into their views on recycling, their opinions on the facilities available at their local shopping centre and how that impacts on how and when they recycle.

In Phase One, we heard how recycling facilities in shopping centres have improved significantly in recent years; in particular with encouraging staff and retail tenants to recycle 'back of house'. Now we hear from their visitors about whether they think the retail sector is doing enough to drive the recycling message to the public, and how easy they think it is to recycle while they are out and about.

By adding this second phase of research we have been able to improve our understanding of the influence locations such as shopping centres can have on a consumer's recycling habits, but we also gained a much broader awareness of their on the go recycling habits as a whole.

Respondents were quizzed with 16 questions, providing us with a number of insights to enable us to analyse data for the following sections of this report:

- Consumer Recycling Habits
- Where, What and How Often?
- Recycling at the Centre
- How Recycling Away From Home Can Be Improved

Views were mixed across the sample of respondents, with a number of positive results suggesting shopping centres are moving in the right direction. However, the results also suggest there may be more work needed by the shopping centres to promote their recycling facilities and encourage shoppers to use them regularly.

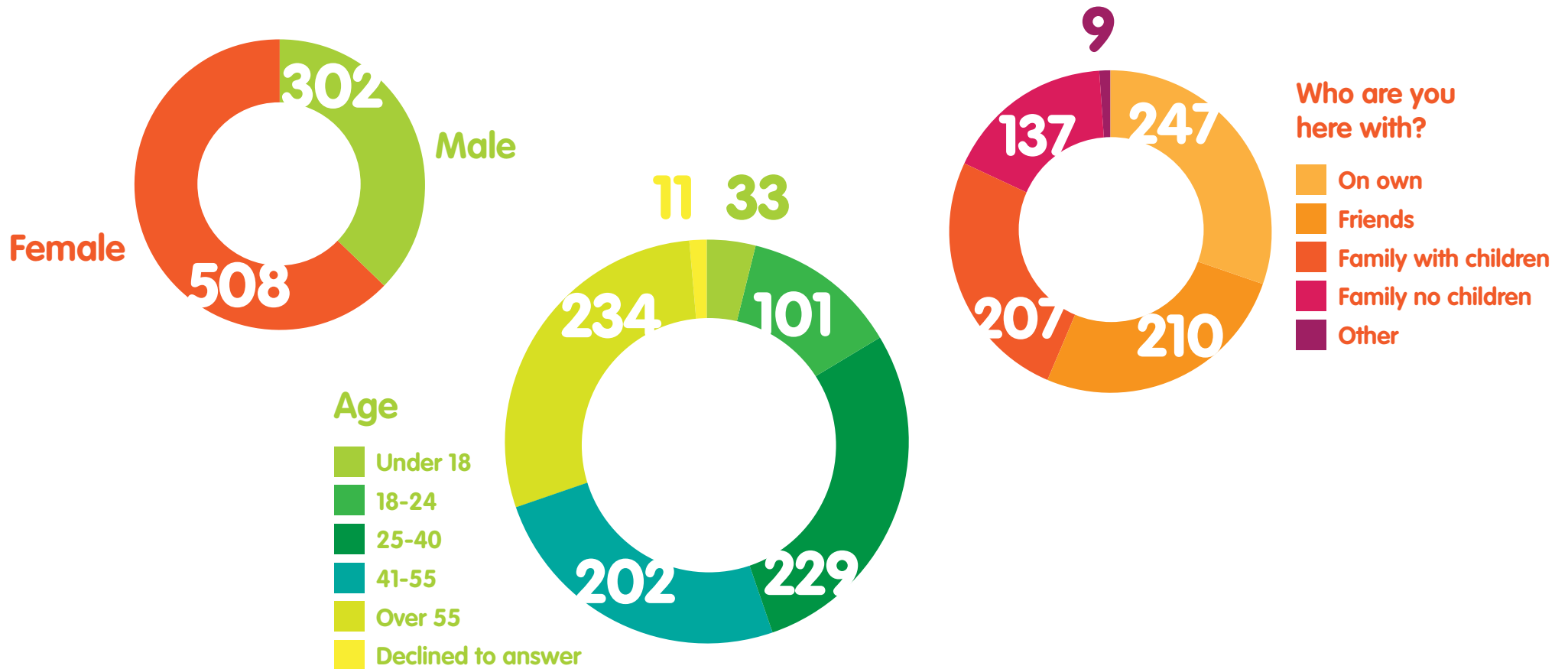
Since completing our research, the Government has introduced new Waste Regulations which require businesses to collect recyclable materials separately to other waste. This is a hugely positive step forward for the UK in terms of driving a much greater volume of away from home recycling. It means businesses must do more to provide recycling facilities to staff, visitors and customers and promote the usage of them. As you will discover in this report, these changes are hugely important to consumers, they are not just a tick box exercise for the Government to meet its targets.

"We were pleasantly surprised at how passionate many consumers were about the importance of recycling away from the home. However, many of the people we spoke to did suggest that more work needs to be done to promote recycling facilities to shopping centre customers. This is a crucial point that we need to highlight to our shopping centre partners and all other shopping centres across the UK"

Diana Caldwell, Marketing & Communications Manager, Every Can Counts



Who we spoke to





Every Can Counts

Methodology

UK shoppers were surveyed at Freshney Place in Grimsby and thecentre:MK in Milton Keynes in October 2014. Surveys were conducted over three days (Friday – Sunday) between 10am and 5pm. Both centres use the Every Can Counts programme to encourage staff and public recycling, and have done so for over 12 months.

The respondents

The survey was responded to by 810 shoppers, chosen at random.

We would like to thank all those who took part in the survey and the teams at Freshney Place and thecentre:MK for their support and the use of their facilities.

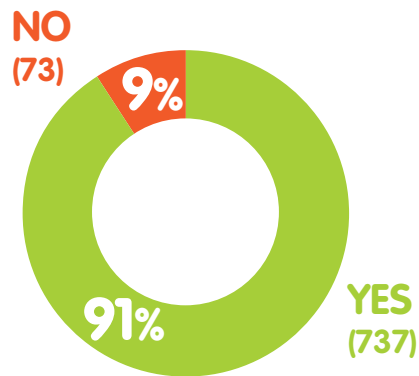
Key findings

-  **91%** of shoppers actively recycle at home
-  **43%** of those surveyed drink at least one beverage can per week
-  **72%** of respondents regularly recycle items they use 'on the go' outside the home
-  Of those that do recycle 'on the go', **70%** do so whilst out shopping at their local shopping centre
-  Of those that recycle outside the home, **80%** usually recycle their drinks cans
-  There was an almost **50:50** split between those that had and hadn't used the recycling facilities at the shopping centre where the survey was conducted

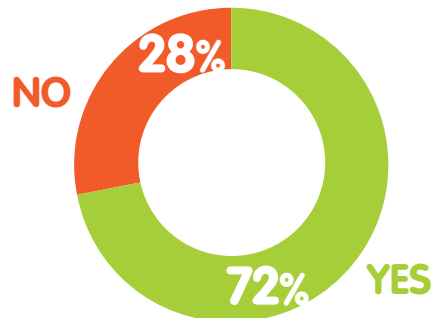


Consumer recycling habits

Do you recycle at home?



Do you recycle outside of the home?



From the sample of people we surveyed, it was extremely positive to find that 91% are already actively recycling at home, and over 72% of respondents also claim to be committed to recycling when away from the home or 'on the go'. This suggests that the habit of recycling that has developed in the home is being continued by the majority; but this result raises the question: What has caused almost 20% of shoppers to drop off between recycling in the home and outside the home? The most likely cause for this drop off seems to be convenience, or lack of it. The results of our survey show that perception of the availability and visibility of recycling bins in 'away from home' situations is at best, inconsistent.

Diana Caldwell of Every Can Counts, comments: "In the last decade there has been a real step-change in domestic recycling, with most households now able to recycle more at home, and this has been reflected in increased recycling rates for all materials. However, recycling should not cease when people leave their front door. Evidence suggests most UK residents are happy to recycle, but we need to reduce the barriers by providing more recycling points, in more visible locations.

And we need to focus on encouraging consumers to use them.

"Every Can Counts was created specifically to encourage drinks can recycling outside the home and since it was launched six years ago we have helped all kinds of organisations install drinks can recycling points across the UK, but there is still a long way to go before we start seeing drinks can recycling outside of the home become the norm. That is what we are striving for in the long term.

"Beverage cans can be recycled endlessly and can be back on the shelf as a new can in around 60 days. As a nation we consume almost 10 billion beverage cans a year, so the environmental benefit of keeping those cans in the recycling 'loop' really stacks up. If consumers are getting that message then the commercial waste sector really needs to help make it easier for them to play their part."

Where, What and How Often?

Where?

Our research suggests that the most popular places to recycle whilst on the go are linked to the retail environment, either shopping malls or on the street. 70% of those that actively recycle away from the home tend to do so in these two locations. It's no surprise people need to recycle when out shopping, it's one of our most popular pastimes and many retail centres are marketing themselves as 'destinations' with people spending many hours combining shopping with eating and drinking. We were more surprised to see that only 30% of those that took part in our survey have ever recycled drinks cans at work. In theory, at least, it is easier to set up and promote recycling in a 'closed' environment.

Since its launch in 2009 Every Can Counts has helped almost 2000 businesses around the UK to set up and promote recycling to their staff and customers. The retail sector has been an active focus of the programme's recruitment activity because it offers an opportunity to directly target people who are using drinks cans both at work and whilst on the go. Hundreds of employees and thousands of shoppers go through their doors every day, and getting the Every Can Counts message out to them provides an opportunity to build lasting, positive behaviour change.

How Often?

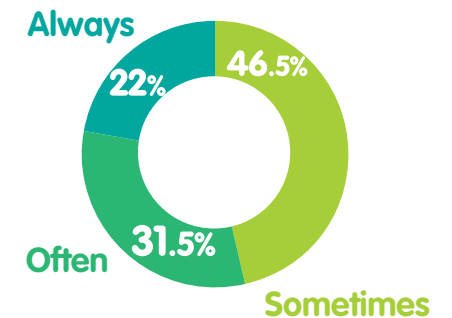
On the surface the number of people that said they recycle on the go was very positive. However when we delved a little deeper we discovered that almost half of this group (43%) only recycled when away from the home 'sometimes' and just 22% said that they 'always' recycle when on the go. So people are actively recycling on the go, but not all the time which suggests that there are barriers to the process. This highlights either the inconsistency in the provision of recycling points, and/or the lack of promotion of these facilities when they are available.

What?

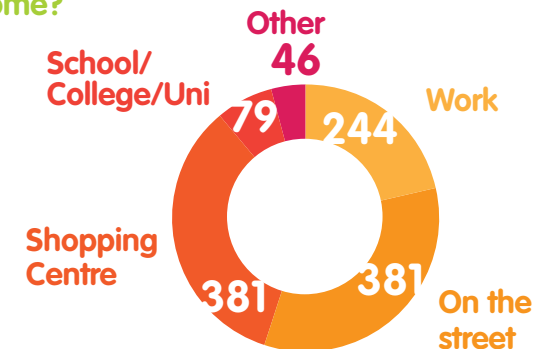
Drinks packaging was at the top of the list of what people need to recycle on the go, with bottles (82%) and drinks cans (80%) the most frequently used items. This is to be expected, as both pack types are designed with portability and convenience for the consumer in mind. There is also a greater awareness of the recyclability of these materials following national awareness and education programmes and, more recently, on pack messaging.

Although the Every Can Counts programme focuses specifically on recycling beverage cans, evidence from organisations where the communication materials have been used as part of a general recycling scheme have shown a marked increase in collections of all materials, not just cans.

How often do you recycle outside the home?



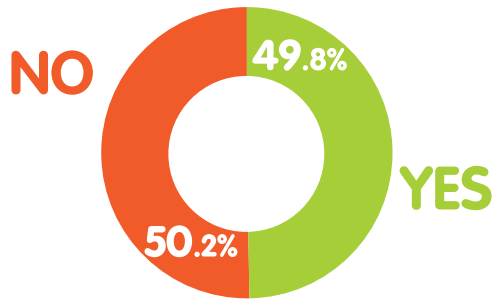
Where do you recycle outside the home?





Recycling at the Centre

Have you used the recycling facilities at this shopping centre?



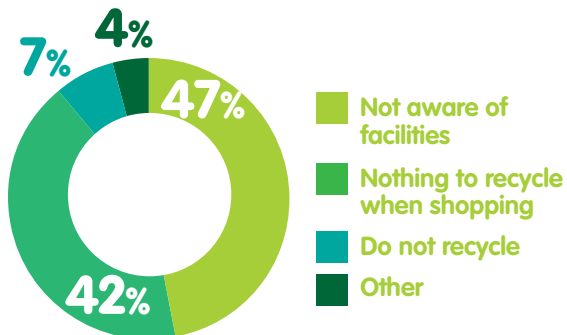
Of those that we surveyed across the two participating shopping centres, there was an almost 50:50 split between those that had used the recycling facilities and those that hadn't. 49.8% of shoppers had recycled at a shopping centre before and 50.2% had not. When we reconsider the fact that over 90% do recycle at home, this revealed a notable divide in recycling habits in the sample, which was likely to be down to a combination of the following two points:

- Visibility and accessibility of recycling bins
- communications activity to create awareness of recycling facilities

When we questioned why people hadn't ever recycled at a shopping centre, the most popular response was that they were not aware of the facilities. Over half of those that hadn't recycled at a shopping centre raised this as the key barrier. This clearly shows that more needs to be done to increase visibility of recycling facilities in shopping centres.

Most people are willing to recycle, but then most of those people are probably not willing to go out of their way to do so, or the thought may not cross their mind without being prompted. So the answer is simple – provide an adequate number of recycling bins in

If no, why haven't you used them?



easy to spot locations, and actively promote these facilities. Using existing marketing channels like the centre website and social media channels, by running awareness events and ensuring centre staff and retail staff encourage shoppers to use them.

On a scale of 1-5 how would you rate the recycling facilities at this or another shopping centre you visit?



When we quizzed shoppers about how they rated the recycling facilities at their local shopping centre, the response was mixed to say the least. 29% said non-existent or poor, 31% said average and 28% said good to excellent. This probably says more about the promotion of the recycling facilities than the facilities themselves, if there is such a split in opinion.





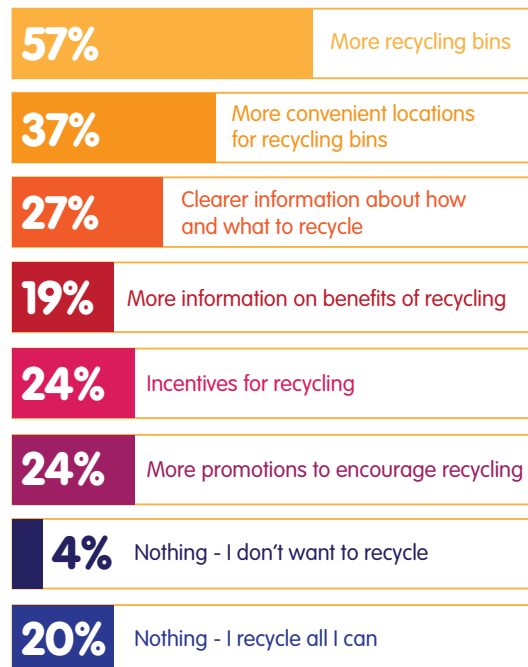
Making Improvements

From those who openly responded to the question: **How could the recycling facilities be improved?** The overwhelming majority said that more bins should be made available for recyclable materials and there should be more in place to drive awareness of how to find and use the facilities provided.

We also asked our participants what would make them recycle more away from home generally. Overwhelming we saw a demand for more bins, and bins in more convenient locations. In principle this seems like a straightforward task.

Diana Caldwell: "The work we do at Every Can Counts is driving businesses and individuals to do more to encourage recycling, but we can only reach so many people each year. We want to see more businesses take proactive action. We can provide lots of support, advice and materials to make it easier, but we need businesses to open the doors and let us help them."

What would encourage you to recycle more away from home?



"There needs to be better signposting and more collection bin locations"

- Surveyed shopper

"The centre needs to make recycling bins more visible"

- Surveyed shopper

"We can provide lots of support, advice and materials to make it easier, but we need businesses to open the doors and let us help them."

Diana Caldwell, Marketing Communications Manager, Every Can Counts



New Waste Regulations

From January 2015, new regulations require firms to separate recyclable materials from other waste. This amendment to the EU Waste Framework Directive is to ensure improvement to the quality and quantity of recycling across the UK. Regulations requiring businesses in Scotland to separate recyclable materials have been in force since January 2014 and are proving a driver for businesses to set up and actively promote recycling.

Diana Caldwell welcomes the regs, and explained how Every Can Counts can assist businesses with this transition: "This is an extremely positive step and means that UK businesses are now compelled to actively drive recycling at their sites. Every Can Counts provides the perfect support function for businesses to meet these new regulations – we can offer expert advice and practical support, such as collection containers for their recyclable materials, proven marketing campaigns and literature to promote recycling in the workplace and put them in touch with their local recycling service providers."

For full details on the latest Waste Regulations, visit <https://www.gov.uk/waste-legislation-and-regulations>

Good Food Show Survey

Outside the shopping environment, we also carried out similar consumer research with visitors to the Every Can Counts stand at the BBC Good Food Show Winter at NEC, Birmingham, polling over 1,100 attendees on their recycling habits. A similar percentage to our shopper sample said they regularly recycle at home - 96% in total. In comparison to those we spoke to in shopping centres, there was a slightly higher percentage of those surveyed at the Good Food Show who claimed they often recycle outside the home, 80% compared to 72%. However, the drop off between home and on the go recycling was almost identical across the two studies. In the shopper's survey the change was 19%, at the exhibition the drop off was 16%. Again this shows there are clear barriers for people to recycle once they leave their home.

When asked what would make those at the Good Food Show recycle more away from the home, 'more collection bins' was again the most popular answer by far with 72%. The statistics from this second survey compounded the wider views of our shoppers and helped to further prove that, if more recycling collection points are made

available in easy to access, clearly visible locations, consumers will take action and the increase in away from home recycling has the potential to increase massively.





Conclusions

Phase Two of our research really highlighted two major points about consumer recycling habits on the go, and in the retail sector in particular:

1. Consumers, in the main, want to recycle and many, but not most, are actively doing it regularly. Inside the home it has become part of our way of life. Away from the home it does happen, but far more inconsistently.
2. Following on from this, we found that although people are generally happy to recycle, they are unlikely to go out of their way to do so. If it's a choice between throwing something recyclable in a nearby rubbish bin, or holding on to it until a recycling bin is easily in reach, they will probably take the first, easier, option.

These two points demonstrate that something needs to change and confirms what we have believed all along. We need to capitalise on the fact that recycling is becoming a habit at home and channel that into making it easier to recycle outside the home. It's the right time to do it –

legislative framework is now in place, but active promotion to businesses, service providers and consumers needs to drive things in the right direction. This active promotion needs to be from all levels - national and local government, the waste and resource management sector and the businesses themselves. Only an integrated approach, with consistent messaging, will help to deliver the step change that will see more, well promoted recycling points, which consumers will want to use.

Every Can Counts is driving the message and offering support. We now have 15 shopping centres signed up to our programme, but there are hundreds more that would benefit from becoming an Every Can Counts partner.

The Every Can Counts programme has been created specifically to encourage people to recycle their cans at work or 'on the go' and so it is helping these businesses achieve their waste management and CSR objectives all across the UK. Diana Caldwell said: Clearly our retail research

has revealed that awareness and visibility of recycling facilities is vital to making the process work. Our programme is set up to help businesses improve the way they promote and encourage recycling. Our eye catching branding, range of promotional materials and experience of engaging events and tactics designed to encourage recycling are the ideal combination for any business that needs to improve its recycling levels, even more so now that new Waste Regulations require businesses to focus on recycling within their organisation."

If you would like to find out how Every Can Counts can help support your business's recycling strategy, contact everycancounts@alupro.org.uk or call 01527 597757.



Our funding partners:



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