

# Every Can Counts Retail Whitepaper Phase One and Two

2015



# Phase 1

Behavioural change communication programmes in the retail sector:

Every Can Counts and its retail partners

Introduction:

## Every Can Counts

Every Can Counts is a unique partnership between the European drink can manufacturers and the recycling industry. It aims to enable and encourage people to recycle the drinks cans they use outside the home; whether it be at work, at college, at an event or whilst out and about.

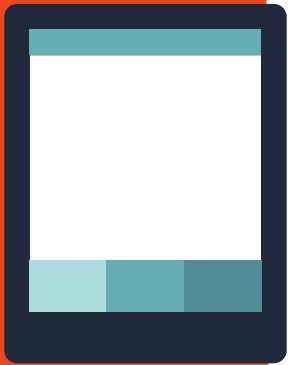
Introducing recycling in your organisation is an effective and visible way to make a positive difference: It demonstrates to employees, clients or customers and suppliers that you are a responsible business, prepared to invest in the future, and committed to sustainability.

As an added bonus, businesses that invest in an effective recycling programme typically find that what's good for the environment is also good for the bottom line.

New UK waste regulations coming into effect on 1st January 2015 will also push shopping centres to do more. The amendment to the EU Waste Framework Directive will mean businesses are required to separate recyclable material (paper, plastic, metal and glass) from other waste, to improve the quality and quantity of recycling across the UK. Again this is something Every Can Counts can support with.

In the last five years, Every Can Counts has helped over 1,700 organisations set up drinks can recycling in over 4,000 locations across the UK. With over 10,000 branded collection points in workplaces, shopping centres, hospitals and also at outdoor events, more people than ever before have access to our award winning recycling programme.





## Executive Summary

This report provides an analysis and evaluation of current Every Can Counts programme users in the retail sector. The retail industry already accounts for a significant percentage of Every Can Counts collection points, these are mostly for staff but with so many shopping destinations around the UK there is an enormous opportunity to influence the wider population about recycling. With retail staff and shoppers combined there is a captive audience of millions in retail outlets every day. Every Can Counts is a perfect fit for retailers because it addresses consumer and staff recycling under the same campaign and messaging.

Launching this research activity enabled us to understand how the Every Can Counts programme is helping shopping centres achieve sustainability objectives and engage both staff and customers, so that we can tailor our future support and campaigns to expand the reach and impact of what we do in the sector.

Methods of analysis in this phase included a telephone survey with key waste management professionals and analysis of can recycling and waste statistics provided by the centres. Results show that since introducing Every Can Counts branded materials there has been a positive impact on recycling behaviour and attitudes towards recycling amongst staff and customers.

The report also reveals how decision makers are approaching key recycling initiatives in shopping centres and provides insight into their targets and the key drivers on environmental waste management.

Many of the respondents highlighted that these attitudes were shaped over a 3 to 5 year period and that generally, centres launched the programme to their retail outlets first before adopting a consumer facing approach.

**“The facilities and support we have received from Every Can Counts have enabled us to develop a successful strategy and make great strides towards our targets.”**

**Dan Pickard, Centre Director,  
Willow Place & Corby Town  
Centre**



## Every Can Counts: Behavioural change – ‘we can teach an old dog new tricks’

Humans are inherently habitual creatures and while we may claim to be open to change, making permanent alterations to our daily routine is a big ask for anyone. Behavioural Change communication strategies have long played a role in teasing people into a more positive way of living, especially when it comes to topics that some may deem ‘new-fangled’ or ‘modern’.

Behavioural Change Communication means taking a positive and supportive approach to delivering the information and resources people need in order to make the changes required. So rather than laying down a list of rules and the subsequent consequences of not obeying, we’re given the chance to learn in a way that we can relate to, and given the much needed equipment and directions to achieve a goal that we are all happy with.

The shift towards more sustainable living is one area that can often be met with resistance, when people can’t relate their daily actions to cumulative results – especially when these are felt on a global scale. Let’s face it, ‘recycle more

or the penguin gets it’ (a real campaign slogan used by a Council to encourage recycling) whilst designed to shock and thereby encourage positive behaviour change, is more likely to either confuse, mystify or make the problem seem too impossible for one person to have an impact on – and probably all of the above!

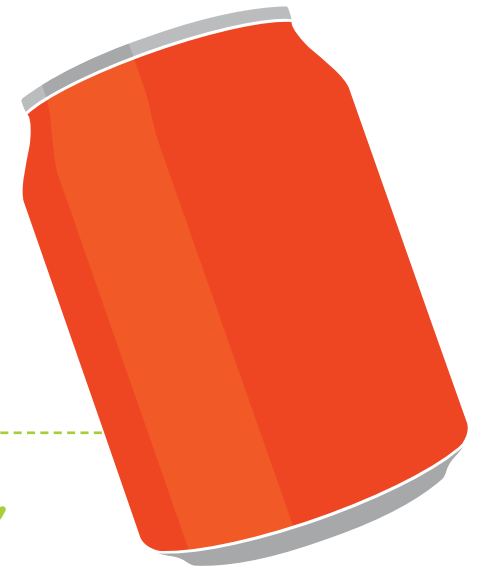
Behavioural Change Communications programmes in the environmental sector have made some impressive strides towards supporting individuals, businesses and wider communities in making the small changes that can make a big difference, now and into the future.

For the last five years, the Every Can Counts team has been assisting organisations big and small to change their habits for the better. We are firm believers that you can’t just put a green bin in the office and expect people to instantly appreciate why it’s there, and what they should put in it.

From the NHS and universities and colleges to shopping centres and city councils, our friendly,

low-cost approach to helping employers educate their teams about the financial and environmental benefits of recycling their drinks cans has had some very positive results. Although our focus is on communications and engagement we also actively assist these organisations to overcome any recycling obstacles they might face, providing bins, bags and posters and helping find recycling service providers to make it as easy as possible.

The Every Can Counts approach helps staff and customers concentrate on dropping their cans into the recycling box or bin. Free materials help to promote, engage and reassure people that when they recycle they are making a positive step, and; that it only takes a small effort to make a big difference. The programme works alongside or as part of an existing scheme but can also work as a stand-alone system.





## Every Can Counts

### Methodology

Telephone interviews were conducted in April and May 2014.

### The respondents

The survey was responded to by six environmental and waste management professionals operating in the retail sector, the majority of which had been working in the sector for over 10 years. Five of the six respondents have established Every Can Counts programmes for retail tenants and/or in public areas. One respondent is in the process of setting up Every Can Counts for tenants.

We would like to thank our contributors:

#### Doreen Hutton

Environmental Services Manager  
intu Trafford Centre, Manchester (introducing  
Every Can Counts to tenants in Autumn 2014)

#### Martin McAtee

Facilities Manager  
Thistles Shopping Centre, Stirling (Joined Every  
Can Counts in October 2013)

#### Neil Grice

Operations Manager  
Freshney Place, Grimsby (Joined Every Can Counts  
in November 2013)

#### Jason Buckley

Environmental Services Manager  
thecentre:mk, Milton Keynes (Joined Every Can  
Counts in June 2013)

#### Dan Pickard

Centre Director  
Willow Place & Corby Town Centre (Joined Every  
Can Counts in June 2010)

#### Jean Sharples

Atlantic Village, Bideford (Devon) (Joined Every  
Can Counts in November 2012)

**12** shopping centres  
with a reach of  
**over**

**110** million  
shoppers &  
**13,937**  
staff





## Key findings

- All respondents have been working with current recycling facilities for two or more years.
- The locations surveyed all currently recycle 80% or more of their waste.
- 100% of the respondents who are currently using the programme said Every Can Counts has been a key driver for helping to educate staff and tenants on the importance of recycling.
- No respondents faced severe barriers to implementing recycling programmes, although there has been resistance at times from some retail tenants (which has eased over time).
- All respondents are continuously looking to improve recycling facilities and infrastructure with some looking to become cost neutral.
- All respondents have long term objectives for what they are doing and feel like they are on the road to achieving them.
- All respondents have seen a steady increase in recycling in terms of tonnage.
- Respondents encourage staff to recycle daily but schemes for rewarding staff and recycling pioneers vary.
- Some respondents have specific environmental awareness events but there isn't always a comprehensive programme of events for staff or customers.
- Many respondents feel recycling has now become second nature to staff thanks to a well-established programme being in place for a number of years.



## Feelings towards current recycling programme and facilities

All respondents with an established Every Can Counts programme in place (83% of the sample) felt they now have a strong strategy to meet recycling needs and persuade more staff, tenants and visitors to participate in recycling. The only centre who claimed they weren't happy with the strength of their recycling programme, had not introduced Every Can Counts to their business when interviewed.

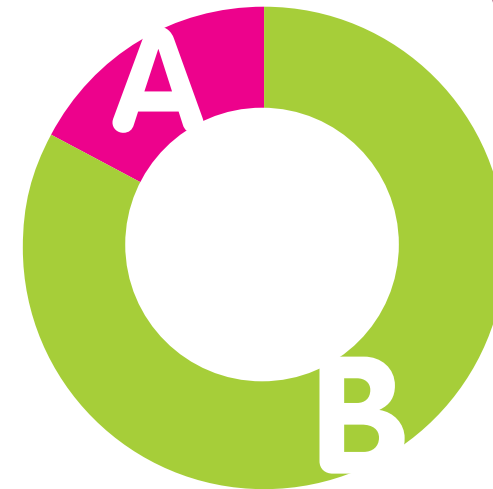
Over the course of all six interviews, each participant detailed how their centre's recycling programme had developed over recent years; all saying there have been significant improvements in facilities, attitudes of both staff and employees, and performance against

targets. Of the five centres that currently use the programme, all explained that Every Can Counts had played a significant role in driving their recycling strategy forward.

Each centre had seen improvement in relation to the amount of waste that was now being recycled, and all had seen volumes increase over the last 3 years.

**A) I don't feel that we have enough facilities or a strong enough programme or**

**B) I feel we have a strong programme in place to meet recycling needs?**



83%

## The ultimate goal – achieving and maintaining 100% diversion from landfill

Most participants we spoke to said the ultimate goal for their recycling strategy was to achieve 100% diversion from landfill for all centre waste. Two centres, who have established Every Can Counts programmes, have already reached this target but state that is only half the battle and maintaining this performance is a bigger goal.

Those working towards this target raised some of the challenges to date:

Martin McAtee (Thistles Shopping Centre) said: “We are now achieving 100% diversion from landfill, which is our main goal and we are very pleased to have met this target. Unfortunately, the hard work doesn’t stop there, we have to keep striving to meet this target every month, but at least we have the facilities in place to do so.”

Jason Buckley (thecentre:mk) said: “I will personally be developing and refining a strategy for improving our recycling facilities every year, and we are always looking to make progress. The original goal was to achieve zero waste to landfill, and we have hit this now. My ultimate goal is to make our recycling programme become cost neutral. I want the recycling we do here to actually pay for my general waste collection cost. That’s what I’m striving to do.

We see the way to it, but it will be a couple of years until we get there.”

Jean Sharples (Operations Manager, Atlantic Village) said: “In 2013 Atlantic Village achieved an 80% recycling rate at the centre by recycling cardboard, polythene, coat hangers, paper, plastics, wooden pallets, metals, including drinks cans, food waste and coffee grounds, even customer returned and damaged stock items. From 2014 we have added polystyrene to our recycling waste system. We aim to achieve 100% diversion from landfill in 2015 as part of our ongoing efforts.”

Neil Grice (Freshney Place), added: “Our aims for our recycling programme are simple: We want to maximise everything we do to improve both our environmental impact and to reap financial rewards. As a result we are constantly striving to improve our facilities and not only are we driving recycling heavily, we are also actively encourage the reuse of materials – particularly cardboard boxes – as this prevents the need for certain materials having to even become waste and go through the entire recycling process, which ultimately, is even more environmentally friendly and efficient.”

**“For me, it’s all about becoming cost neutral – I want my recycling programme and overall waste management strategy to save my business money. That’s the future of sustainable business”**

**Jason Buckley, thecentre:mk**



## Breaking down recycling barriers with retail tenants

One area of concern that was raised by respondents was the attitude of some retailer tenants towards recycling. There is a feeling amongst some that recycling is a distraction, when all focus must be on turnover and profit; particularly with the retail sector still having a challenging time post-recession. Our participants explained that to overcome this resistance the recycling system needs to be uncomplicated and communication with tenants needs to be carefully planned to ensure they know what to do, how and why they are doing it:

Martin McAtee (Thistles Shopping Centre) said: "Although there has been some resistance to the enhanced recycling requirements that we're pushing to our retailers. Most have been happy to oblige and have accepted the need to take action. Only a handful of tenants have been slow to adjust to the changes but we're continuing to work with them every day and educate them on the importance of recycling not just for the centre but for their individual business as well."

Jason Buckley (thecentre:mk) explained: "We do have various procedures that we go through in terms of filtering messages to our retail tenants, but it is very difficult to actually enforce recycling upon them. Trying to get that message out and monitor what all of them are doing would require a lot of time investment.

"First and foremost we try to raise awareness to our centre staff and let things filter down from there."

Centre staff have now embraced the recycling challenge at the centre: MK in Milton Keynes but it wasn't an instant hit. Jason, added: "It certainly wasn't an overnight success; it's taken a number of years to get to where we are now. It took probably the best part of 10 – 12 years to get here, but now it's certainly become second nature."

Doreen Hutton (intu Trafford Centre) added: "Education of retailers was a bit of hard work. Their focus tends towards selling, not recycling. It is now compulsory for them to recycle correctly. It took some patience to get this across, but it's working well now.

"We intend to use Every Can Counts to help us embed recycling behaviour better throughout the centre."

Neil Grice (Freshney Place) said: "I'm pleased to say that we haven't experienced major barriers. Some tenants have suggested their staff rooms are too small to accommodate recycling facilities but we have overcome this minor point.

"A number of the larger retailers in Freshney Place do things a little bit differently as they have their own recycling centres that handle their waste. So although they're not working in the same way as the majority of us in the centre, they are still recycling heavily and are very much behind the programme."





## Implementing the Every Can Counts programme

Every Can Counts has been adapted in different ways from centre to centre to suit specific needs, with a variety of resources being utilised. Our programme managers have helped develop local marketing plans for each and we support centres with branded posters, stickers and other promotional materials, as well as can collection boxes and can crushers. We've also helped create profile-raising events for both staff and customers.

**All participants stated that joining the Every Can Counts programme has been extremely positive and has helped them raise awareness of their recycling provisions significantly:**

Jason Buckley added: "The first thing that we did when we joined the Every Can Counts programme was create a recycling promotion week. Now every year we promote the recycling facilities and look for inside management teams to come up with something for customers and staff to engage with. Every Can Counts is perfect for doing this, and really helps to grab people's attention and get people interested in recycling."

Dan Pickard (Willow Place & Corby Town Centre) said: "Although we have provided recycling facilities in the town for ten years now, before the Every Can Counts programme was introduced there was no recycling strategy in place. The facilities and support we have received from Every Can Counts have enabled us to develop a successful strategy and make great strides towards our targets. We now have teams working to collect recyclable waste and empty the bins. Our local collection partner makes a big difference to the operation too."

Martin McAtee said: "Working with Every Can Counts has made a huge difference to our recycling activity. I don't think they could have done much more to support us. Our contact in Scotland often goes way above and beyond what he needs to be doing. We have over 90 retailers and he came in and brought each and every one of the can recycling bins to every shop, which I just thought was exceptional."

Neil Grice explained: "In the past we've had some challenges with the consumer recycling drive. When we've provided segregated collection points for different waste, they haven't been used properly. People have thrown banana skins or crisp packets in the paper recycling bins for example – not

maliciously, just because they're in a rush and didn't realise it wasn't just a normal bin.

"As a result we've held back on pushing our recycling programme directly to shoppers. Instead, we ensure our waste collectors carry out second stage recycling, which means they sort the waste and segregate recyclables when they collect it.

"However, since joining Every Can Counts, we have made the decision, with their support, to promote recycling to consumers directly again, initially with beverage cans. Every Can Counts is providing communication materials like posters and more importantly a set of can crushers, which we are confident will make can recycling more obvious and appealing to shoppers."

Jean Sharples concluded: "Every Can Counts is a fantastic programme, we would recommend it not just to others in the retail sector, but to all businesses. Their branded materials, knowledge and support have significantly enhanced our recycling strategy and education process."





## Creating recycling champions

At Every Can Counts we believe that having someone, or a team, to motivate and enthuse others about recycling from within is key to successful implementation and growth of the programme.

A number of the centres surveyed spoke about initiatives they had implemented to help the recycling cause. Some centres had recruited volunteers from their staff to spread the message and lead by example, others were incentivising those taking the initiative with rewards.

Jason Buckley told us: "We actively encourage our staff to recycle. We have bins and posters, and we add bespoke articles in our news updates about it too. We produce a recycling pack which goes out annually to them along with waste guidelines, and we find that a number of the team really get behind the whole recycling ethos and drive others to do the same."

Daniel Pickard touched on the incentive scheme Willow Place & Town Centre has developed to encourage new ideas around recycling: "If any of

our team comes up with an initiative that saves the company money over a 12 month period they will get a 10% commission of the savings. It's generous, because that way, it really makes staff think about the possibilities."

Martin McAtee said: "Our janitors here are the pioneers, the maintenance team whose job it is to have on the ground management of the recycling. They encourage the retailers to recycle and keep an eye on them. They play a very encouraging role and have shown real passion for recycling since it became part of their role."

Doreen Hutton said: "We have created the Bright Ideas Awards and the Bright Ideas Scheme is part of this. This includes a 'Green Idea' category. We collect entries from staff who come up with environmentally friendly solutions and initiatives and judge them. If they're suitable for the centre we will use them. Each year we award a Green Idea Champion based on this, which is all part of a big awards ceremony."



## Making Every Can Counts in Scotland

In January 2014, the Scottish Government introduced regulations for all businesses north of the border, requiring them to present key recyclable materials for separate collection. These regulations have already made a huge impact on the attitudes and actions of Scottish businesses and adoption has been impressive.

In advance of these regulations, in 2013 we secured additional funding for Scotland, which has seen Every Can Counts promoted as a means of helping businesses achieve compliance with the regulations.

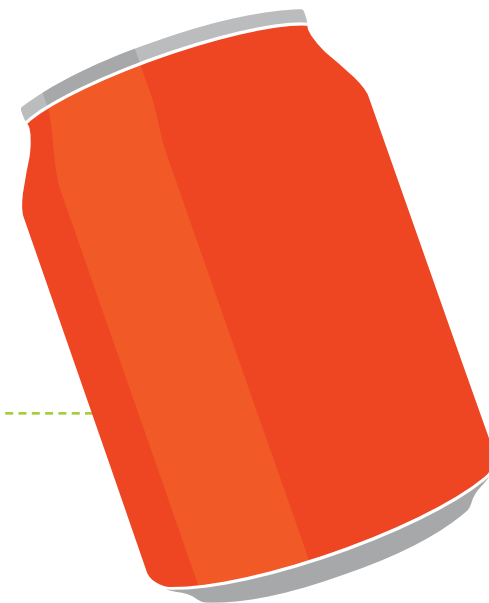
We recently conducted a separate piece of research to establish the effectiveness of the Scottish waste regulations and discovered that awareness of the new regulations has increased significantly since 2013. To read more about this survey visit [www.everycancounts/scotland](http://www.everycancounts/scotland).

We have also run recycling 'on the go' trials with can crushers installed at a number of locations, including the Thistles Shopping Centre in Stirling.

Martin McAtee, Facilities Manager at The Thistles, welcomes the regulations, and explained his workplace have made some big changes as a result of the legislation: "There were a lot of systems we needed to update to in preparation. We basically redesigned the way we process waste here to ensure we were not only meeting but exceeding current legislation – the results have been very positive indeed."

- **The Waste (Scotland) Regulations will help Scotland become one of the most resource efficient nations in Europe.**
- **The regulations aim to ensure a minimum level of service is on offer to households and businesses across Scotland and signal the end of landfilling biodegradable municipal waste in Scotland.**





## Conclusions

Phase one of our research has provided a number of enlightening talking points and on the whole painted a hugely positive picture of recycling in UK shopping centres, where the Every Can Counts programme has been implemented.

Of all the respondents we spoke to, recycling was high on their agenda and with the help of the Every Can Counts programme they had all made major progress over the last five years

Although each centre has a range of facilities as well as differing initiatives and approaches to promoting recycling and stakeholder engagement, all were extremely passionate about the cause and determined to achieve, and exceed, their recycling objectives.

Whether it be helping to make the activity more eye catching thanks to our colourful branding on collection bins and posters, raising awareness by running events, or investing in resources such as can crushers, the Every Can Counts programme is clearly having a significant effect on improving

awareness of, and participation in, recycling. The Corporate Social Responsibility (CSR) agenda becomes more prominent every year, and shopping centres have a huge responsibility to promote sustainable action on two counts:

- They are major employers and have a duty to provide a positive influence to their staff and their tenants' staff.
- Hundreds of thousands or even millions of consumers pass through their doors every year who create waste and so must ensure this is dealt with responsibly.

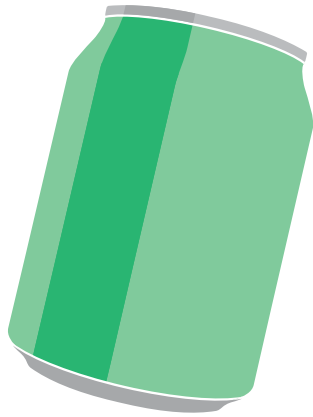
The Every Can Counts programme has been created specifically to encourage people to recycle their cans at work or 'on the go' and so is helping these businesses achieve their waste management and CSR objectives. However, both this report and many of our findings from other sectors demonstrate that the programme has a very positive influence beyond drinks cans, with our recycling messages having a positive impact

on staff and customer engagement as well as on collections of other recyclable materials. The clear brand messaging and call to action is helping retail businesses communicate to both staff and customers (where relevant) in an engaging and appealing way.

Phase 2 of our retail report will see Every Can Counts conduct quantitative research in shopping centres, surveying retail staff and shoppers alike about their recycling habits, views and ideas. This will enable us to have a 360° view of how recycling programmes are delivered and received, thus establishing how we can help refine how shopping centres and retailers develop their recycling strategy.

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





## APPENDIX 1: Every Can Counts – retail partner research questions

1. Out of the below statements, which do you think best summarises how you feel about your current recycling facilities within the shopping centre best:
  - a. I don't feel like we have enough facilities or a strong enough programme to meet the recycling needs of the shopping centre
  - b. I feel like we have a strong programme in place to meet recycling needs and persuade more people, staff or customers to participate
2. What recycling provisions do you have in the centre?
3. Is it a streamed programme e.g. paper/ mixed/ general waste?
4. How long have you had the facilities for?
5. Did you face any barriers when setting the programme up?
6. What were the key drivers behind setting up the programme?
7. Who is responsible for making decisions around recycling?
8. Who collects your recycling?
9. How often do you look to develop your recycling facilities?
10. What has triggered the thinking if so?
11. Are you looking to develop your recycling facilities or programme in the near future? If so, how?
12. Do you promote your recycling facilities to customers and staff, or both?
13. If so how do you promote them? What promotional message work best with staff/ customers? Has using Every Can Counts helped? Would you like to do more? If so, what would you do?
14. Does recycling form a key part of your CSR strategy? Can we see a copy of your CSR strategy?
15. Do you know how much in tonnage you recycle in a year? Has this increased?
16. How important is recycling to you personally?
17. Have your attitudes changed since adopting a programme at the shopping centre?
18. Do you have any staff who encourage recycling as part of their job role?
19. Do you have any voluntary recycling champions?
20. Have you noticed more enthusiasm from staff over the course of your recycling scheme?
21. Would you consider rewarding staff who pioneer recycling in the future?
22. How do you/would you reward them?
23. What more could ECC do to help you promote and encourage staff/customers/ both to recycle more?
24. A quick statement to finish – in your professional opinion how important is recycling in a shopping centre?





# Phase 2

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.



An illustration on the left side of the page features a red background with a white curved border at the top and bottom. In the center, there is a black tablet with a white screen and a blue bar at the bottom. Below the tablet is a blue shopping bag with two black handles.

## 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.

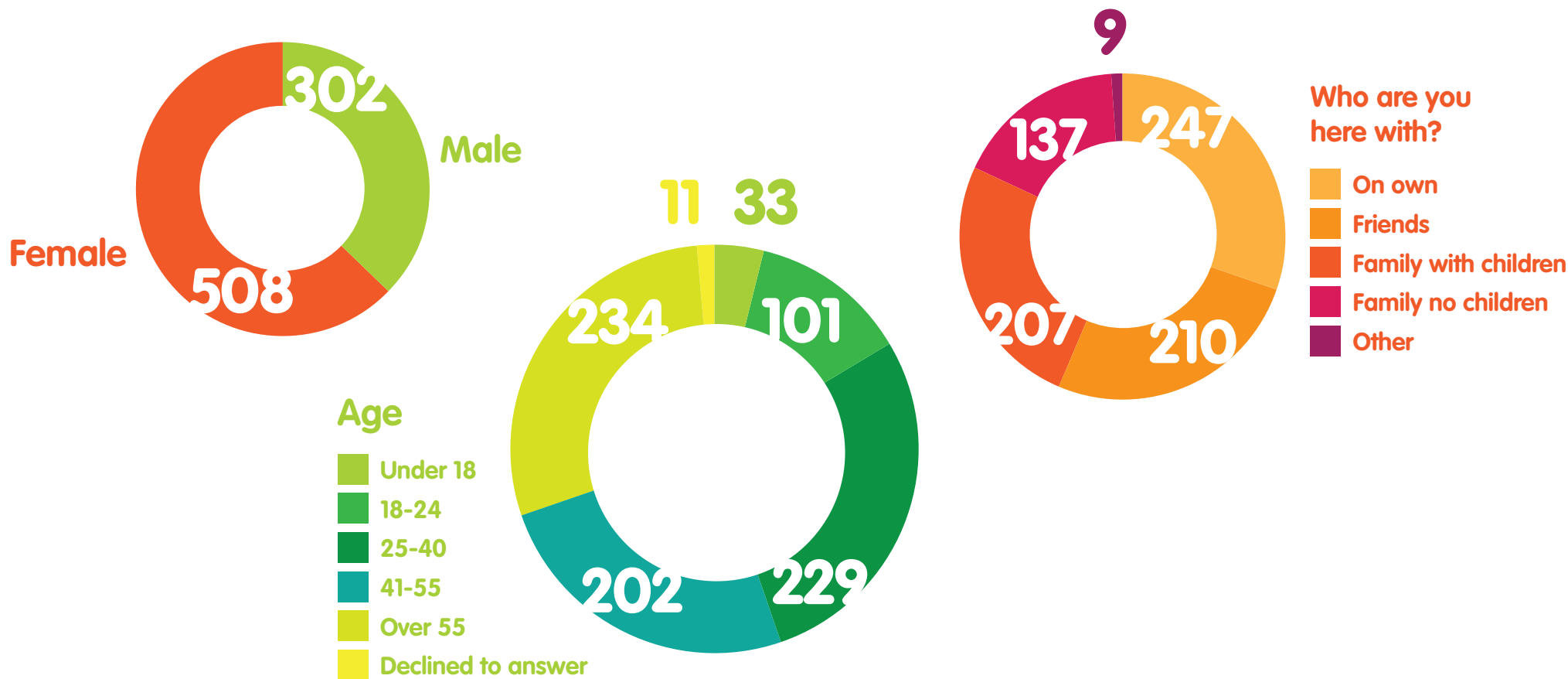
Since completing our research, the Government has introduced new Waste Regulations which require businesses to collect recyclable materials separately to other waste. This is a hugely positive step forward for the UK in terms of driving a much greater volume of away from home recycling. It means businesses 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.

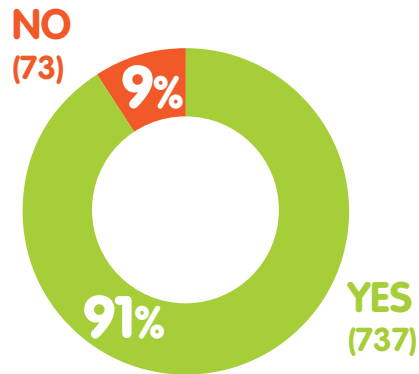
### Key findings

-  **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

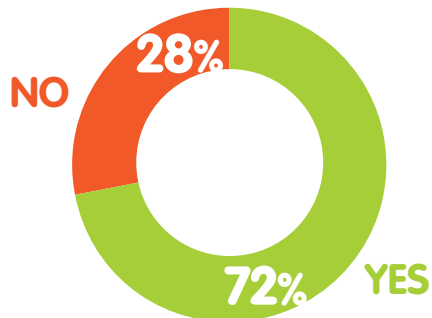


## Consumer recycling habits

### 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?

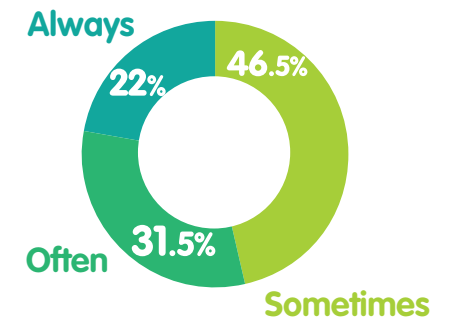
On the surface the number of people that said they recycle on the go was very positive. However when we delved a little deeper we discovered that almost half of this group (43%) only recycled when away from the home 'sometimes' and just 22% said that they 'always' recycle when on the go. So people are 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?

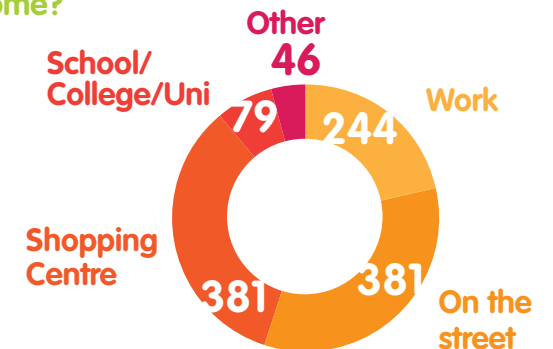
Drinks packaging was at the top of the list of what people need to recycle on the go, with bottles (82%) and drinks cans (80%) the most frequently used items. This is to be expected, as both pack types are designed with portability and convenience for the consumer in mind. There is also a greater awareness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



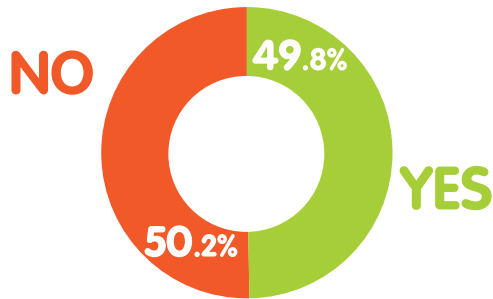
### Where do you recycle outside the home?





## Recycling at the Centre

Have you used the recycling facilities at this shopping centre?



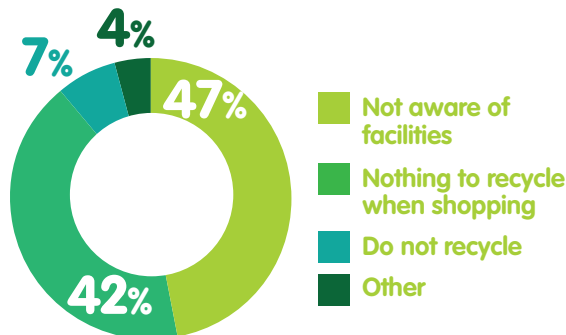
Of those that we surveyed across the two participating shopping centres, there was an almost 50:50 split between those that had used the recycling facilities and those that hadn't. 49.8% of shoppers had recycled at a shopping centre before and 50.2% had not. When we reconsider the fact that over 90% 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.





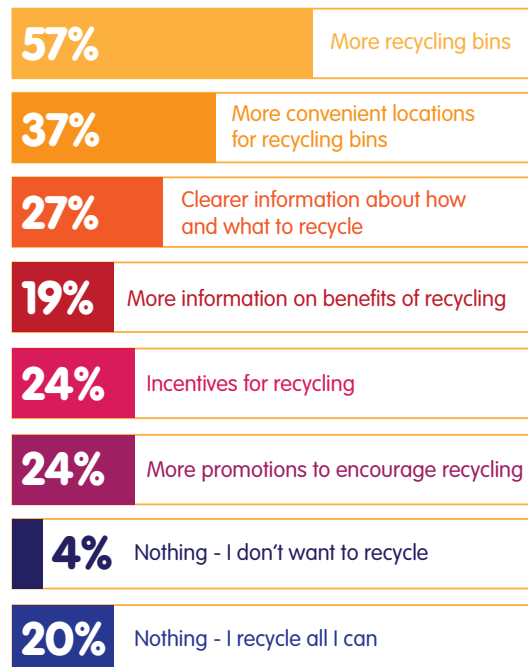
## Making Improvements

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](mailto:everycancounts@alupro.org.uk) or call 01527 597757.**



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