



Llywodraeth Cymru
Welsh Government

RESEARCH, DOCUMENT

Business attitudes on the changes to workplace recycling (summary): baseline report

This research surveyed small and medium enterprise (SME) business establishments located in Wales in February 2024.

First published: 22 July 2024

Last updated: 22 July 2024

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Introduction

Business establishments were identified through ownership of a business telephone line. The aim of the survey was to better understand businesses' perceptions and attitudes to the changes to workplace recycling legislation.

The Welsh Government's Resource Efficiency and Circular Economy department, commissioned Beaufort Research, to conduct a survey of the Welsh businesses to better understand the perceptions and attitudes regarding the legislative changes to [workplace recycling](#).

The changes are not only focused on improving the quality and quantity of recycling but are vital to delivering Wales's commitments to reach zero waste and reduce our carbon emissions by 2050. The Regulations implement several actions which are included in the Welsh Government's Circular Economy Strategy for Wales, [Beyond Recycling](#).

In addition to this business survey, a series of separate surveys have also taken place. Business surveys ^{[[footnote 1](#)]} were conducted in April 2023 and October 2023. The findings from April 2023 have yet to be published and October 2023 findings were published in March 2024. Public surveys were conducted on: February 2023, November 2023 and March 2024. The February 2024 business survey findings will be published at the same time as the March 2024 public survey findings.

Methodology

The survey was conducted on the Beaufort Wales Business Omnibus survey, which interviews a quota sample of 500 decision makers in SME businesses across Wales each wave and reflects the population of SME businesses in

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Wales in terms of key demographic characteristics. A different set of businesses are interviewed each wave although samples are matched in terms of key business characteristics.

Interlocking quotas were set on business activity and size within region based on data supplied by the business data and marketing solutions provider, Market Location. Business activity was split into the following groups using UK Standard Industrial Classification (2007):

- Wholesale and Retail
- Hotels, Restaurants, and other services
- Agriculture, Fishing, Mining and Utilities
- Manufacturing
- Construction, Transport/communications
- Finance, Real estate/business activities.

Size relates to the number of employees and was split into the following categories: 1; 2 to 9; 10 to 250 employees.

A sample of businesses were randomly selected by Market Location and businesses within each activity group and region were randomly contacted and interviewed until the quota targets were met.

Eligible respondents were defined as the manager, proprietor, owner, managing director or other senior manager present at the time of interview.

Draft questions for the survey were supplied by Welsh Government. These were finalised following discussions with Beaufort.

Open and closed questions were asked. Participants were given response options to choose from if asked a closed question. At analysis, responses to open-ended questions were manually categorised and assigned specific codes to allow for a quantitative measure of responses to be made. An inductive

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approach to generating codes was carried out whereby open-ended answers were reviewed and 'codeframes' were produced based on the content of responses. As a response from a single respondent could be given multiple codes, the percentage of responses against all codes will add up to greater than 100%.

The survey was available in English and Welsh and could be taken in the participants' preferred language.

Fieldwork took place between 5 and 25 February 2024. A total of 503 telephone interviews were completed and analysed. The legislation had not been introduced at the time of the survey and the findings and survey question wording reflect this. At time of reporting, the legislation has been introduced (6 April 2024).

Full data tabulations from the survey have been provided to the Welsh Government in a separate technical report.

The Wales Omnibus Survey uses proportional Market Location quota sampling (not random sampling) to reflect SME business population in Wales. Therefore, any findings in this survey reflect the view of the sample and care should be taken in translating any findings to the wider SME business population in Wales.

Further, any changes in responses between survey waves should also be treated with care. The changes reflect the difference in attitudes between the two samples rather than any definitive change at business population level. The results are not definitive of changes in attitudes at the business population level but are indicative only and should be interpreted as such.

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Main findings

- Spontaneous awareness of any forthcoming changes to the law among those SMEs surveyed has increased to 76% in this survey. In the October 2023 wave, 42% of SMEs surveyed were aware of the changes.
- When prompted with an explanation of the law change, 80% of SMEs surveyed had heard about the new workplace recycling law (up from 47% surveyed in October 2023). 48% of the SMEs surveyed noted that they 'knew quite a bit about it'.
- 75% of SMEs surveyed reported that they support the law (79% recorded in October 2023). 14% of SMEs surveyed were against the law change in this February 2024 survey.
- 80% of SMEs surveyed reported feeling either 'very' or 'fairly' well prepared which is an increase on those recorded in October 2023 (66%). 38% of the SMEs surveyed did not feel informed about the actions they need to take to prepare, but this is fewer than October 2023 (49%).
- 26% of SMEs surveyed noted that they have done at least a little to research how they might be affected by the new law change.
- 53% of SMEs surveyed recalled seeing or hearing the campaign communication about the new law which is an increase from 28% in October 2023.
- When asked about the main message of any communications they had seen, the most common themes identified related to the need for businesses to recycle related to the need for businesses to recycle (33% of SMEs surveyed), or that there was going to be a new legal requirement (24% of SMEs surveyed).
- When prompted with a clip of the radio advert, 28% of the SME's surveyed could remember hearing the advert which is an increase from 16% in October 2023.
- Those who had recalled hearing or seeing the campaign were then given a list of actions and asked whether they had undertaken any of these. 41% of

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SMEs surveyed who had heard or seen the campaign reported acting because of seeing or hearing the campaign. Of the 290 SMEs who reported hearing or seeing the campaign:

- 18% of SMEs surveyed contacted a private waste carrier.
- 17% of SMEs surveyed accessed the Welsh Government website.
- 9% of SMEs surveyed contacted their LA.
- 70% of SMEs surveyed noted that they already recycle everything they can, - an increase since the subsequent survey conducted in October 2023 (65%).

Footnotes

[1] [Business attitudes on the changes to workplace recycling \(summary\)](#)

Contact details

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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Social research number: 60/2024

Digital ISBN 978-1-83625-412-6

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