



Llywodraeth Cymru
Welsh Government

RESEARCH, DOCUMENT

Public attitudes on the changes to workplace recycling (summary): interim report

This research surveyed a sample of the Welsh population to better understand the public's perceptions and attitudes to the changes in legislation.

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Introduction

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

The legislative 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](#).

This is the third survey conducted by Beaufort Research, and all questions on the topic were included in the previous two surveys. The most recent of which was conducted in November 2023 and a summary of findings was published on 25 March 2024 [\[footnote 1\]](#), providing an indication on trends in attitudes of the sample at this time. In the November survey, additional questions were added regarding whether respondents had heard or seen marketing or communications about the legislation change to workplace recycling. These questions were also included in this survey. At the time of this survey, adverts were live on television and radio.

This research with the public is being complemented by research with small and medium sized (SME) businesses. Questions were included in the Beaufort Wales Business Omnibus Survey in October 2023 and published on 25 March 2024.

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Methodology

The survey was conducted on the Beaufort Wales Omnibus survey, which interviews a quota sample of 1,000 adults across Wales each wave and reflects the population in terms of key demographic characteristics. A different set of adults is interviewed each wave although samples are matched in terms of key demographic characteristics.

The survey was subject to interlocking demographic quota controls ^[footnote 2] of age within gender. A further separate quota control was set on social grade ^[footnote 3] and interviews were undertaken with residents of every local authority in Wales. At the analysis stage, the data was weighted by age group, gender, local authority grouping and social grade. This ensures that the sample reflects 2021 Census figures and the characteristics of the Wales population.

Respondents were also asked whether they were an owner, director or senior decision-maker within a business, charity, or public sector organisation. This allowed for responses to be broken down by whether respondents were decision-makers within an organisation who will be directly affected by the introduction of the regulations. In the November 2023 survey, 123 respondents reported that they were a decision-maker in a business, charity, or public sector organisation. This is slightly less than the number of decision-making respondents in the March 2023 survey which was 147 decision-makers. In the March 2024 sample, 114 of respondents reported that they were a decision-maker in a business, charity, or public sector organisation. The findings related to this sub-sample should be treated with care due to the small sample size.

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

All questions asked were closed questions, that is participants were given response options to choose from.

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Demographic questions are included as standard in the Wales Omnibus survey. The survey was available in English and Welsh and could be taken in the participants' preferred language.

Fieldwork took place between 26 February and 17 March 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 quota sampling (not random sampling) to reflect key demographics within the Welsh population. Therefore, any findings in this survey reflect the view of the sample and care should be taken in translating any findings to the wider 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 population level. The results are not definitive of changes in attitudes at the population level but are indicative only and should be interpreted as such. The same care should be taken when interpreting comparison between waves of responses by decision makers in a business, charity, or public sector organisation.

Main findings

- Spontaneous awareness of any changes to the law around recycling for businesses, public sector organisations and charities between survey waves has risen to 43% of those surveyed in March 2024 (from 29% in November and 12% in March 2023 ^[footnote 4]). Decision-making respondents in businesses, public sector organisations and charities were more likely to be aware of changes to the law than the overall sample.
- When prompted with a description of the new workplace recycling legislation,

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more than three quarters of those surveyed in March 2024 (78%) had heard of the law.

- When prompted with a description of the new workplace recycling legislation:
 - 61% of those surveyed had heard of the law (up from 47% surveyed in November 2023 and 26% surveyed in March 2023).
 - 18% of those surveyed said they had heard of the legislation and knew quite a bit about it, while 43% had heard of it but weren't sure of the details.
 - 38% of those surveyed in March 2024 had not heard of the new law (down from 51% in November 2023 and 73% in March 2023).
- Although awareness has increased quite considerably between samples since March 2023, attitudes have remained broadly supportive across samples surveyed.
 - For example, 72% of respondents surveyed were in favour of the law in March 2024, compared with 75% in November 2023 and 77% in March 2023.
 - The proportion of those surveyed who were against the changes remained similar across survey samples. 7% of respondents surveyed were against the changes in March 2024, and 6% in November 2023 and 5% in March 2023.
- Although still a small minority, the proportion of those who noted they were decision-makers in businesses, public sector organisations and charities who did not support the new law was higher than the proportion of the public against it (at 14% compared to 7% respectively).
- 32% of those surveyed had seen advertising, communications, or marketing about the new law (up from 22% in November 2023 and 9% in March 2023).
- Spontaneous advertising awareness was higher among those respondents who noted they were decision-makers of makers in businesses, public sector organisations and charities (recorded at 50%).
- 24% of those surveyed had recalled seeing the campaign before when they were prompted with a selection of campaign visuals (up from 16% in November 2023), rising to 34% of decision makers.

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- 36% of respondents surveyed recalled seeing the TV advert when prompted (up from 22% in November 2023).

Footnotes

[1] Public attitudes on the changes to workplace recycling and the ban on single use plastics (summary)

[2] Quota controls are target numbers of interviews set for specific demographic groups within the population, to help achieve a representative sample for the survey. Interlocking demographic quota controls means that the target incorporates two variables: age group within gender.

[3] Social grade is a classification system based on occupation developed for use on the National Readership Survey (NRS). Social grades are defined as follows:

- AB: Higher and intermediate managerial, administrative, and professional occupations
- C1: Supervisory, clerical, and junior managerial, administrative, and professional occupations
- C2: Skilled manual workers
- DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only.

[4] Public attitudes on the changes to workplace recycling and the ban on single use plastics (summary)

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