

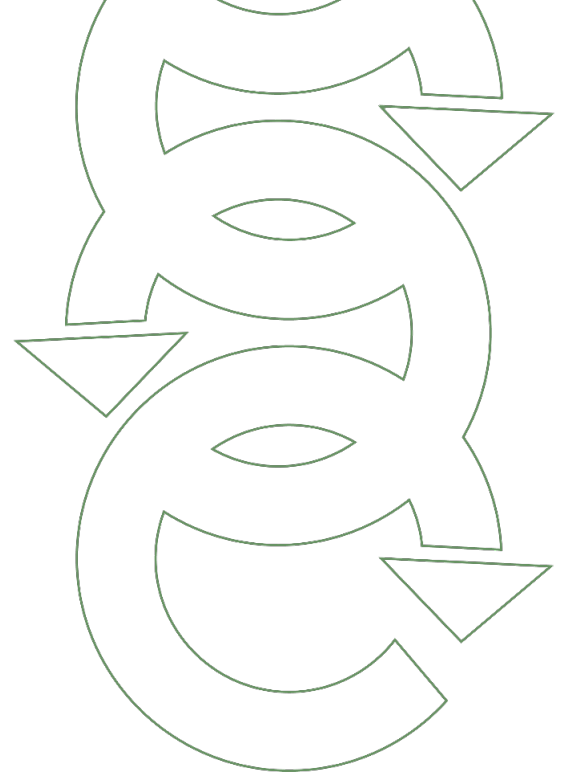
RECOUP

Leading a more circular
plastics value chain

UK Citizen Plastics Recycling Behaviors Insights Survey 2023

November 2023

Summary



How do you recycle
your household
plastics





RECOUP is the UK's leading independent authority and trusted voice on plastics resource efficiency and recycling. As a registered charity, our work is supported by members who share our commitments including a more sustainable use of plastics, increased plastics recycling, improved environmental performance and meeting legislative requirements. We achieve these by leading, advising, challenging, educating, and connecting the whole value chain to keep plastics in a circular system that protects the environment, underpinned by evidence and knowledge.

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November 2023

Foreword

For almost a decade RECOUP's citizen facing arm, Pledge2Recycle Plastics¹ has been engaging with the community educating and cutting through citizen confusion about plastics recycling. RECOUP, through Pledge2Recycle Plastics, prides itself in being the only organisation that nationally engages with citizens with a 'boots on the ground' approach as well as supplying resources for local authorities and education establishments to tap into. The plastics recycling messaging is rooted in the practical knowledge of how kerbside plastics packaging is sorted, captured, reprocessed and end markets for that material.

Throughout 2022, Pledge2Recycle Plastics have been developing a simplified set of messaging for citizens which does not fixate on the differences between national kerbside collections but instead focuses attention on the similarities. In asking the question "how can we help citizens become less confused, recycle more and recycle right", the focus for 2023 has been to communicate a simple and concise set of guidelines reducing the amount of 'exceptions to the rule'. It is also hoped that this will contribute to reducing recycling contamination, an ongoing issue with national rejection rates between 13 – 14%.

RECOUP have conducted previous citizen behavioural insight studies² including work with Watch Me Think in 2019³ This previous research led to the Kent Understanding Plastics Project⁴ where citizen communications were trialled and tested in a 'live lab' situation. This work then led to a project in County Durham (County Durham Recycles Plastic)⁵ aimed at testing the simpler recycling narratives.

External factors such as the pandemic no longer seem to have strong influence on recycling rates and in conversations with communities in 2023 it no longer formed part of the dialogue. Conversations with shoppers in retail environments seemed to be filtered through the lens of inflation and the cost-of-living crisis.

The RECOUP UK Household Plastic Packaging Collection Survey 2022⁶, estimated that around 833,000 tonnes of rigid plastics packaging were not placed by citizens for collection kerbside. Recycling rates for 2022 were estimated at 63% for plastic bottles, and 38% of plastic pots, tubs and trays consumed were place for recycling kerbside by residents. The RECOUP UK Household Plastic Packaging Collection Survey 2023⁷ reports a reduction in the amount of plastics packaging placed on the market from 1447kt to 1375kt for consumer plastic packaging – a 72kt (5%) decrease.

With the plastic bottle recycling rate stagnating at 63% and a small 1% increase in pot, tub, and tray recycling to 39%. The number of local authorities collecting pots, tubs and trays has risen to 88% and those collecting films and flexibles falls slightly to 12% with an estimated 7% collection rate.

¹ Pledge2Recycle Plastics was previously branded Pledge4Plastics and launched in September 2014. The rebrand took place in May 2018.

² RECOUP UK Household Plastic Packaging Collection Survey 2022

³ Consumer Attitudes and Behaviour - Plastics Packaging 2016 – conducted by ICARO & RECOUP (Pledge4Plastics), funded by M & S. Citizens Plastics Recycling Behaviours Insights Survey 2021

⁴ <https://www.recoup.org/p/348/pledge-2-recycle-plastics-consumer-insight-recycling-study-2019>

⁵ www.recoup.org/wp-content/uploads/2023/09/uk-household-plastic-packaging-collection-survey-2022-full-report-5123-1672931733.pdf

⁶ www.durhamrecycles.co.uk

⁷ www.recoup.org/resources/reports

Executive Summary

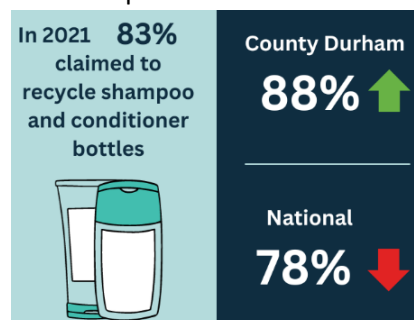
RECOUP's Pledge2Recycle Plastics brand updated their online Citizen Plastics Recycling Behaviours Insights Survey on the 29th March 2023. The survey takes the form of an informal questionnaire and was used both online and in face-to-face settings. Responses were driven through social media (Facebook, Twitter, Instagram, LinkedIn); Local Authority websites; and for County Durham was hosted on a new website (www.durhamrecycles.co.uk). RECOUP and Durham County Council partnered to deliver a plastics recycling community-based education programme launched in May 2023.



These results concentrate on the responses up to 9th November 2023 at 2424 responses received for the whole of the UK and 460 for County Durham. The survey asked respondents to declare how and if they recycled plastics packaging every time, sometimes, and if not why. Comparisons were also made with the previous Citizen Plastics Recycling Insights Survey 2021⁸, where nationally 95% of respondents claimed to recycle drinks bottles every time. In 2023 this had dropped by 7% to 88% of respondents declaring this behaviour. However, 97% of County Durham respondents declared they recycle drinks bottles every time an increase of 2% on 2021 and an upshift of 9% on the national average.

As part of the County Durham Recycles Plastics project, leaflets were distributed countywide (247,000 households), and contact made with local parish councils, and schools. Pledge2Recycle Plastics engaged with County Durham citizens at events, community groups, retail environments, as well as social media and local press advertisements.

Recycling from the bathroom has previously been a target area in terms of Pledge2Recycle Plastics communications to increase the capture of 'other' plastic bottles. Those declaring to recycle every time dropped nationally by 5% to 78% whilst for County Durham this rose by 5%, with 88% of respondents declaring they recycle these bottles every time.

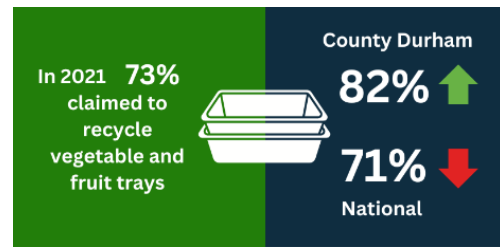


In the 2021 insights survey 62% of respondents said they recycle raw meat trays every time, in 2023 this dropped 9% to 53%. In face-to-face questionnaires citizens cited they were uncertain about the impact raw meat had on the tray's recyclability and were wary of kitchen contamination from rinsing out raw meat packaging as reasons for not recycling.

⁸ www.recoup.org/wp-content/uploads/2023/09/citizen-plastics-recycling-behaviours-insights-study-2021-final-020222-1643892961-2.p

Those respondents claiming to recycle plastic fruit and vegetable trays dropped 2% nationally to 71% whilst in County Durham 82% of respondents claimed this behaviour – 9% above the national average.

Confusion continues to prevent recycling and was given as the main reason for not recycling an item with 32% of citizens claiming to be confused around what can be recycled. At the point of recycling other factors heavily influence the outcome such as convenience; if the pack requires cleaning; if the pack confuses because of its colour shape or size; or the pack has tear off sections; or a full sleeve - in short, anything that can add to citizen confusion and require additional intervention by the consumer.



The mismatch between on pack labelling and local authority ‘target/non-target’ listings can conflict, contributing to citizen confusion particularly with items such as toothpaste tubes. If plastics packaging is to improve its reputation to citizens of its circular credentials, then pack claims need to be able to be upheld and supported by the value chain. Technical advances in pack design to render a pack more recyclable by a reprocessor needs to match progress in capture, sorting, and end markets as well as matching local authority target listings before packs can be marked as ‘recyclable’.

The RECOUP UK Household Plastic Packaging Collection Survey 2023⁹ reports a reduction in the amount of plastics packaging placed on the market to 1375kt and a stagnant plastic bottle recycling rate at 63%. Pots, tubs, and trays collection rate increased 1% to 39%, whilst films and flexibles placed for recycling remains at 7%. This citizen insights reflects fewer citizens nationally declaring to recycle bottles every time with an increase in those declaring to recycle pots, tubs and trays.

However, if these behavioural declarations were to be fully reflected kerbside, we would still expect to see a much higher household capture rate. County Durham residents are currently responding more positively which perhaps reflects an increased desire to recycle more as plastics packaging is more prevalent in their minds due to countywide plastics recycling communications.

Plastics packaging is, by its very nature, more complex for citizens to understand than other materials such as glass, metals, cardboard, and paper where shape, size and colour are more standardised. Whilst there is a fixation on the differences between what is collected where via kerbside collections, citizens have even more reasons to believe plastics recycling is complicated and confusing. Clear rules and simple easy to follow guidelines can help citizens navigate this complex area of packaging.

RECOUP have long called for a national plastic bottle recycling message which given 100% of UK local authorities collect this format kerbside is not unachievable. As 88% of local authorities now collect pots, tubs, and trays kerbside, the question is whether there is a willingness across the value chain to concentrate on the similarities in collection to formulate an agreed standard for how citizens can recycle these items correctly. Could the sector voluntarily agree a national call to action, and more importantly could the sector agree how such a campaign should be delivered and funded.

⁹ www.recoup.org/resources/reports

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