



What Consumers Want

(in a post-covid world)

8 key research insights on engaging consumers in recycling

OPRL
THE ON-PACK RECYCLING LABEL

Key insights

Understanding what information consumers respond to – and how they behave – is essential to get consumers recycling more often. This document draws on five major pieces of consumer insight research, including a study with over 5,000 consumers in February/March 2021, undertaken for OPRL Ltd by Tangible Branding, a consumer research company.

This broad body of research has revealed the following 8 key insights:

The infographic is a grid of 8 colored panels, each containing a numbered insight. Panel 1 (light blue) shows hands holding a globe. Panel 2 (teal) shows a sad boy. Panel 3 (dark blue) shows a water bottle with '89%'. Panel 4 (blue) shows a question mark. Panel 5 (yellow-green) shows a signpost with 'Recycle' and 'Don't Recycle' arrows. Panel 6 (teal) features the UN Environment Programme logo. Panel 7 (yellow-green) shows 'Recycle' and 'Don't Recycle' signs. Panel 8 (dark teal) shows recycling bottles and a product label.

- 1.** People want to do the right thing to safeguard our planet
- 2.** Young people need more help and encouragement to act, not despair
- 3.** 89% of people say they check on-pack for guidance on recycling
- 4.** A lack of recycling information leads to guesswork and mistakes
- 5.** Clarity and consistency avoid confusion
- 6.** Actionable information is essential
Best global practice as defined by the UN Environment Programme
- 7.** Messaging must match understanding and context
- 8.** OPRL is the only UK recycling label that meets consumer needs
Our labels are seen by consumers on hundreds of thousands of products every day

1. People want to do the right thing

Overwhelmingly, people want to 'do their bit' for the planet, their communities and future generations.

But wanting to act responsibly and feeling equipped to make the right decision on every piece of packaging are very different things.

People need help to turn their good intentions into the right actions.

Our research shows that **Three quarters of us** recycle as something positive we can do to help the planet.

But younger people are less sure they can make a difference.

Why we recycle



2. Covid has made us think differently about sustainability

The covid pandemic has made us all think more about our impact on the planet and what we can do to help. Reducing waste and increasing recycling are the most common everyday actions taken by people.

But there are significant differences in how people are reacting. Over 55s are very focused on 'doing' and are much more likely to be recycling more and reducing waste. Young people (18-34s) worry they can't make much of a difference and say they are too confused or too busy in their lives. They need more support and encouragement.

Across the UK, the Welsh are the most committed recyclers and take personal responsibility. Scots are the least engaged in recycling and less likely to see it as a 'normal' thing to do. Having a consistent cross-council message from government empowers people to act.

People want a partnership with business, government and councils to help them do the right thing.

Which of these things are you doing to reduce your impact on the environment?



Using re-usable bags when shopping

68%



Increasing recycling at home

60%



Making an effort to reduce food waste and eat up leftovers

55%



Reducing energy use at home

49%



Taking my litter home for disposal

46%



Reducing water use at home

45%



Avoiding single use plastic bottles

45%



Reducing clothing and fashion purchases

40%



Driving less frequently

38%

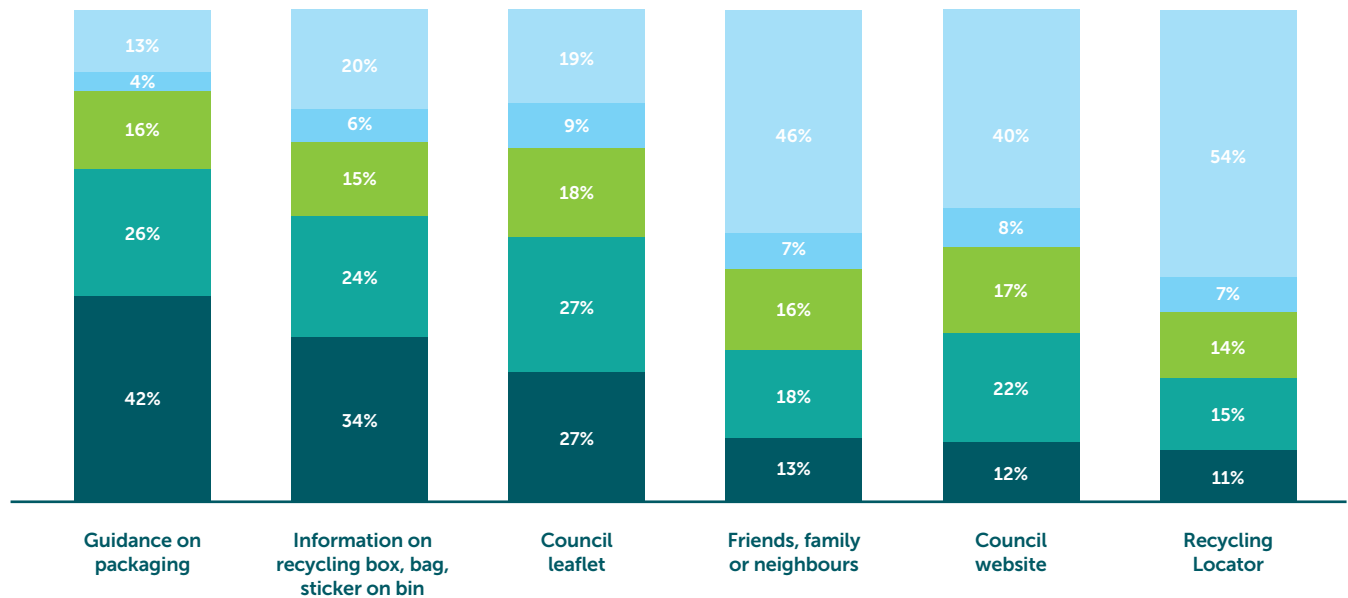
3. People check for on-pack guidance on recycling

The biggest barrier to recycling is confusion. While we are becoming more expert, 3 in 5 of us still say uncertainty is the main reason we don't always recycle.

9 in 10 of us check for information on unfamiliar packaging or whenever we're unsure – and a third of us check before purchasing.

We want to **#MakeItEasy** for people to check for recycling information on pack with clear and consistent labels.

Where do you get your knowledge about what you can recycle and how?



- Key**
- I rarely/never look for information
 - I used to look but don't anymore
 - I look occasionally in case information has changed
 - I look occasionally when I'm not sure what to do
 - I regularly look for information

Key findings

Most frequently, people look on packaging, or the bin for information. Most people check labels on the pack or receptacle, or refer to council literature to know what/how to recycle

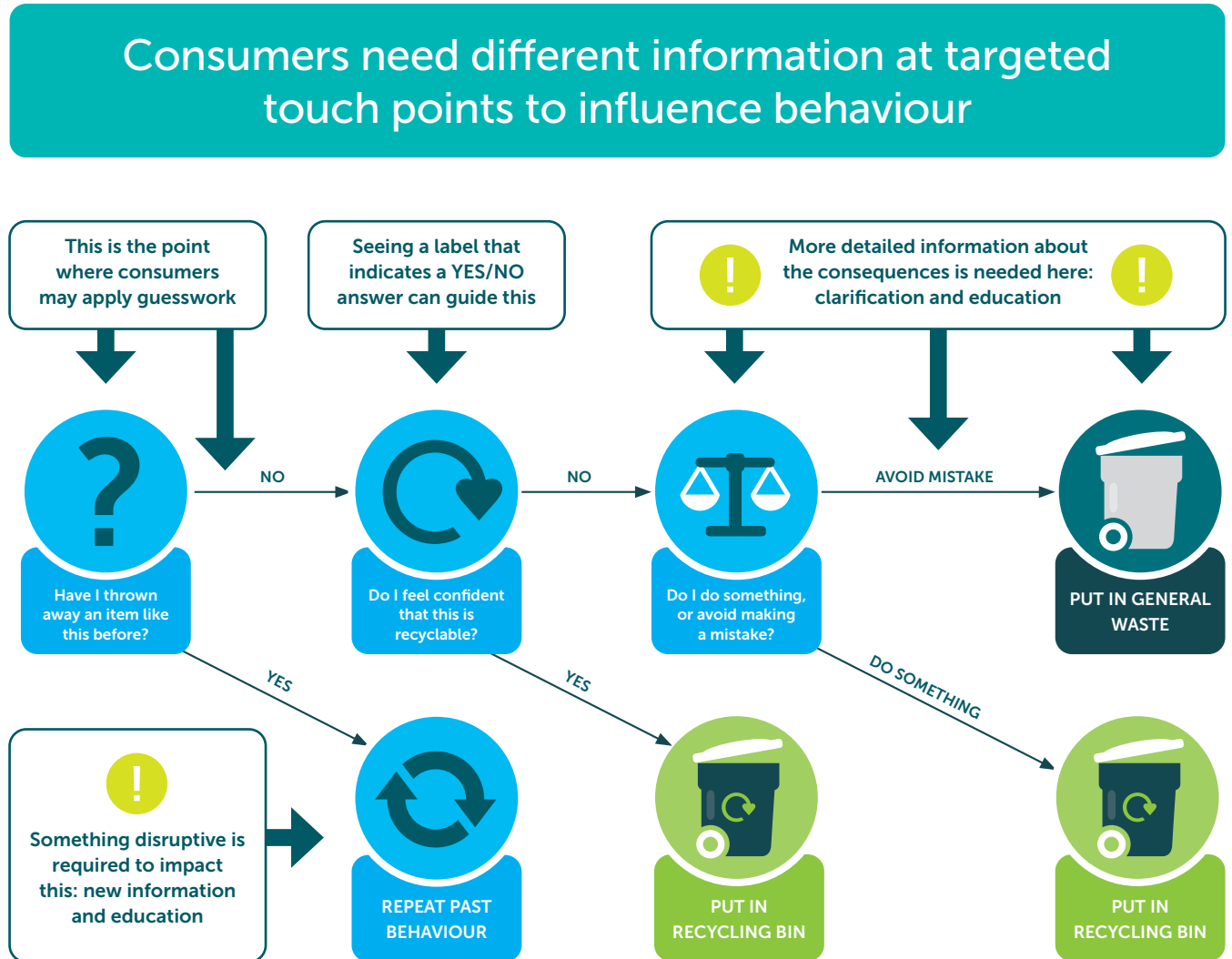
4. A lack of recycling information leads to guesswork and mistakes

Without a recycling label to guide them, people make decisions based on their own values as they try to do the right thing.

Defaulting to "If in doubt, keep it out" leads to valuable resources going to landfill or energy from waste.

Automatically recycling packaging because you believe it should be recyclable can contaminate materials that really can be recycled.

A clear instruction label grows people's confidence and action. Simple calls to action *Recycle* and *Don't Recycle* have led to an 8% increase in confidence.



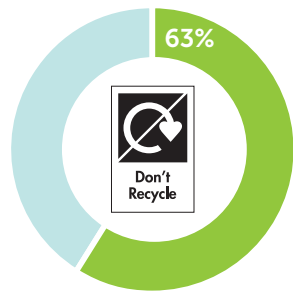
5. Clarity and consistency avoid confusion

How many consumers accurately recognise what each label means?

Surveys repeatedly suggest that people find recycling labels confusing, but our research shows that it's multiple labelling systems that people find confusing.

Consumers want clear and recognisable information at a glance. In their busy lives most people want a quick prompt as they decide which bin to put packaging in. They don't want to stop to think about it, they're looking for a strong visual cue to *Recycle* or *Don't Recycle*.

Like road signs, recycling labels need to be consistent and unequivocal.



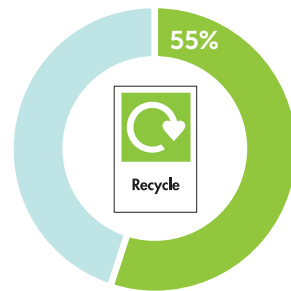
OPRL Label

Means It can't be recycled where I live



Tidy Man

Means It's about preventing litter



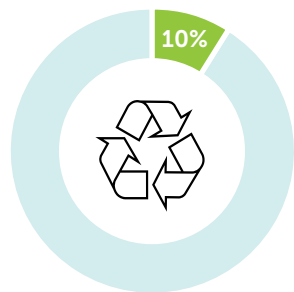
OPRL Label

Means It can be recycled where I live



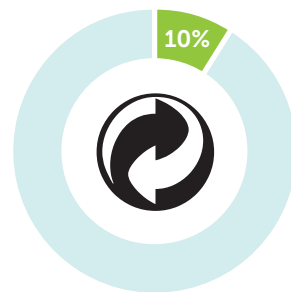
Resin Identity Code

Means It can be recycled, but not necessarily where I live



Mobius Loop

Means It can be recycled where I live



Green Dot

Means It can be recycled, but not necessarily where I live

Key findings:
OPRL labels are three times more understood than any other recycling symbol and six times more than the Mobius Loop or Green Dot

6. Actionable information is essential

“Can I recycle this?”

People need specific, relevant and actionable information to recycle better, more often.

Some recycling symbols don't relate to UK recycling infrastructure. The material might be recycled somewhere internationally, or perhaps the producer funds recycling systems in certain European and Middle Eastern countries.

OPRL labels are founded on evidence that packaging is collected and successfully sorted in the UK, the materials reprocessed and used in new products or packaging. If just one of those is unlikely to happen, it's labelled accordingly.

Active language results in higher levels of understanding. *Recycle* and *Don't Recycle* lead to 9% greater understanding than situational statements *Widely Recycled* and *Not Yet Recycled*.

The Environmental Coalition on Standards identifies OPRL labels as providing clear recyclability instructions, relevant to UK infrastructure. Only the Australasian Recycling Label, based on OPRL's approach, gets the same endorsement.



OPRL labels have been given the highest rating of global best practice by the UN Environment Programme and Consumers International.

They reference us for **Clarity**, stating our “new design reduces burden on consumer to seek extra information” and **Relevance**, stating our labels “acknowledge local infrastructure variation”.



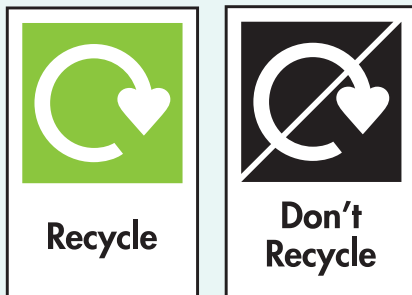
7. Messaging must match understanding and context

People will recycle if the messaging is clear and easy to understand, and designed for where and when people are recycling. Even quite complex messages are understood if clear, simple language is used. Positive calls to action promote positive actions and reduce confusion.

At home:

Communicating how to recycle at home is straightforward. Consumer testing shows that:

- a) Images and messaging are both important in signalling the correct action to take
- b) Colour coding reinforces messaging: a green logo signalling that packaging is recyclable, a black logo signalling that packaging cannot be recycled



These labels won the majority vote in testing. They were considered functional, clear, tonally neither too authoritarian nor too familiar, and communicate exactly what needs to be done

At collection sites:

Asking people to go the extra distance in recycling at collection sites is more complex because there is less shared language; most people understand what HWRCs (Household Waste and Recycling Centres) are, but don't recognise that terminology. Council terms like 'kerbside' also don't mean much to consumers: 'Check home collections' is preferred by all age groups.



These labels came top for clarity: 'Recycle with bags' is clearer than 'with film'; 'Supermarket' preferred over 'Store' and everyone understands 'recycling point' means local/neighbourhood bring sites

On-the-go:

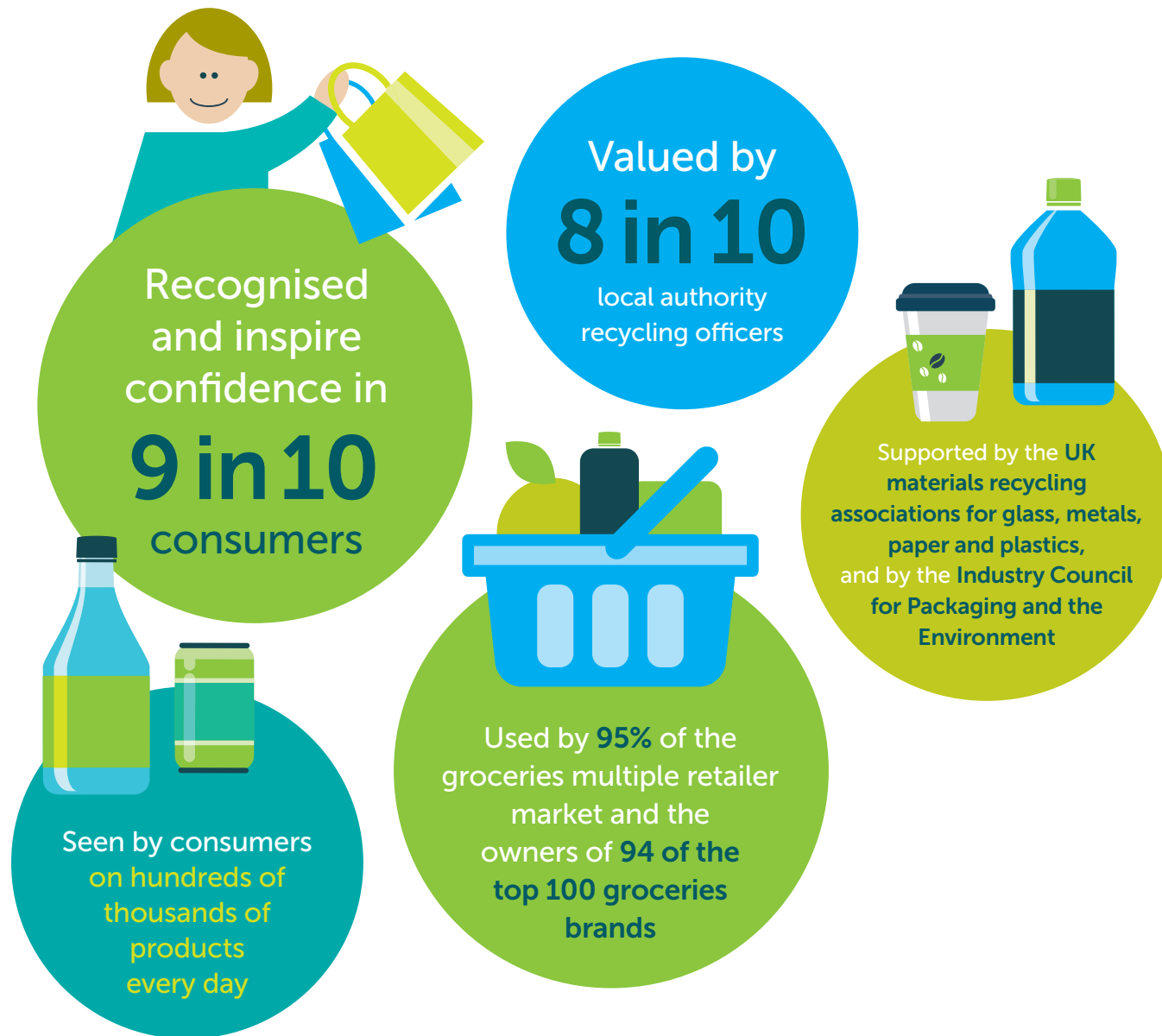
While on-the-go recycling varies considerably across the UK, retailers are increasingly providing take-back recycling facilities.

Giving clear and simple instructions are just as important for consumption in the street or at the office as they are at home.



Direct, unambiguous terms like 'Recycle' or 'Take' are preferred to 'Check local in-store recycling'. The term 'Shop' scored higher than 'Store' with 'Recycling point' for offices and other non-store sites

8. OPRL is the only UK recycling label meeting consumer needs



Only OPRL labels provide the clear, consistent and relevant messaging a mandatory recycling label needs.

OPRL labels are:

- Action-oriented
- Relevant
- Reliable
- Widely recognised and understood
- Widely used

Sources

The insights in this document were drawn from the following sources:

1.

OPRL Ltd commissioned Tangible Branding, a consumer research company, to gather insights into consumer attitudes to recycling, the barriers to action and how labelling helps overcome some of these. Five studies were conducted in April 2017, November/December 2018, June and October 2019, and February/March 2021.

In order to ensure representative views and also to gain a depth of understanding not possible in a relatively short questionnaire, Tangible used a mixture of research techniques, repeating contextual questions in order to confirm the consistency of consumer attitudes and understanding.

Study 1 involved in-depth one on one interviews with 21 men and women aged 18-34 years old, split evenly between Manchester and Slough, in April and May 2017. This group was targeted as the least engaged in recycling. Around half of the interviewees had young children.

Study 2 consisted of online surveying of 2,700 nationally representative respondents across Great Britain and was undertaken during November and early December 2018. When those completely disengaged from recycling were removed 2,580 respondents proceeded to the detailed survey. This was supplemented by in depth one to one interviews with 50 people, half of them in Manchester, half in Slough, also in late 2018. These interviews were designed to explore what lay behind the survey answers.

Study 3 involved researcher-led interactive online discussion groups, with two groups each of 20 people from across England and Wales. The online conversations took place over four days, with a different topic each day, during June 2019 as part of a larger study into the role of technology and labelling in supporting consumer action.

Study 4 used online surveying of 1,058 nationally representative respondents across Great Britain, but there was a 7 percent bias towards women. Our results show women under 35 and over 55 are more active recyclers than men of the same age. This study was undertaken in October 2019.

Study 5 used online surveying of 5,168 representative respondents across Great Britain, of whom 3,249 were in England, 950 in Scotland and 968 in Wales, enabling statistically significant conclusions to be drawn for Scotland and Wales individually. The sample was re-weighted to produce representative results for GB. This study was undertaken in February/March 2021 and included questions on attitudes to sustainability and behaviour changes in light of the covid pandemic, including changes to shopping behaviours, packaging consumption and recycling patterns. A higher proportion of Scottish and London respondents lived in flats, a factor consistently shown to reduce recycling engagement.

The study also investigated consumer responses to Refill label designs for use on re-usable packaging, with three different refill systems needing separate and specific calls to action.

Sources

The insights in this document were drawn from the following sources:

2.

Market penetration data comes from comparing OPRL membership data with published industry market coverage research (Market Share of Grocery Stores in Great Britain, Statista, January 2021; Top 100 Groceries Brands 2020, The Grocer Magazine). The Local Authority Recycling Advisory Committee surveys the attitudes of local authority recycling officers to OPRL labels annually.

3.

The UN Environment Programme and Consumers International published its report – ‘Can I Recycle This? A Global Mapping and Assessment of Standards, Labels and Claims on Plastic Packaging’ in May 2020.

4.

The Environmental Coalition on Standards published its report ‘Too good to be true? A study of green claims on plastic products’ in July 2021.



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