

What Consumers Want

7 key research insights
on engaging consumers
in recycling



Key insights

Understanding what information consumers respond to – and how they behave – is essential to get consumers recycling more often. This document draws on four major pieces of consumer insight research undertaken for OPRL Ltd by Tangible Branding, a consumer research company.

This broad body of research has revealed the following 7 key insights:

1.



People want to do the right thing to safeguard our planet

2.

People check for on-pack guidance on recycling

84% of us use on-pack information – the highest rated source



3.

A lack of recycling information leads to guesswork and mistakes

4.



Clarity and consistency avoid confusion

5.

Actionable information is essential

Best global practice as defined by the
UN Environment Programme



6.

Messaging must match understanding and context



7.

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
19 in 20 of us

say that safeguarding the planet is our most important concern and is a major or contributing motivation behind recycling

Why we recycle



2. People check for on-pack guidance on recycling

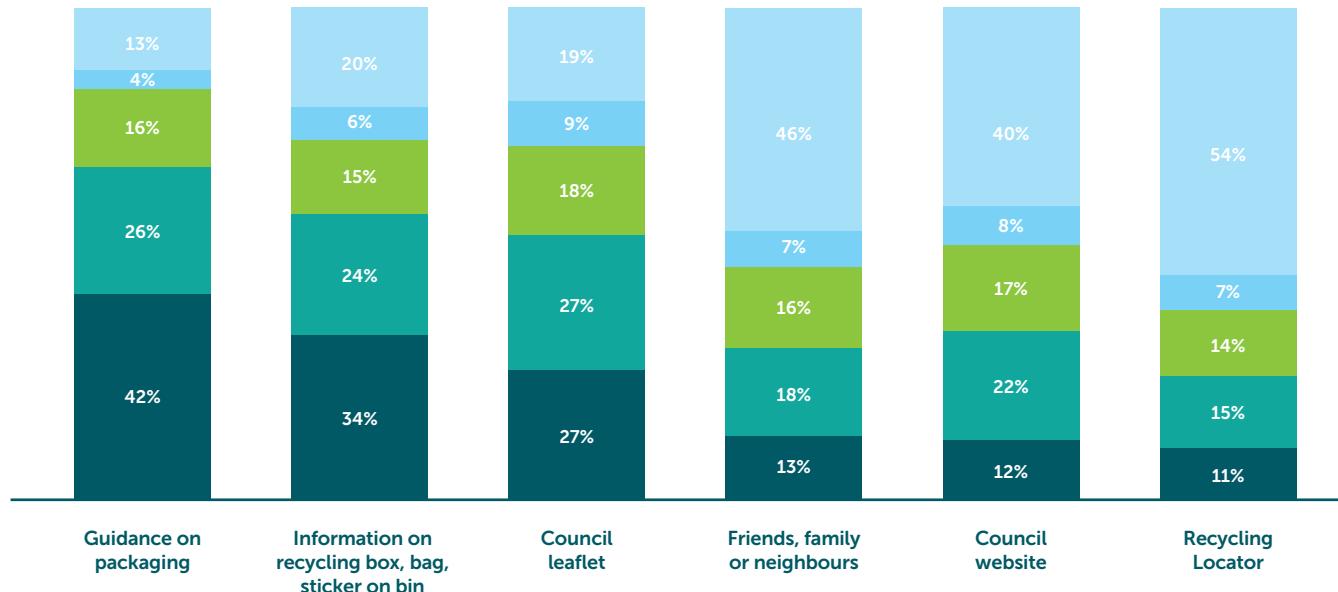
The biggest barrier to recycling is confusion. Two thirds of us say uncertainty is the main reason we don't always recycle.

Over 4 in 5 of us check for information on unfamiliar packaging whenever we're unsure. After all, we check ingredients, cooking instructions, where products come from and allergens.

We surveyed where consumers get their knowledge about what to recycle and how: [our findings are shown here](#).

We want to make it natural and easy for people to check recycling information on-pack.

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 finding:

Information on packaging is the most effective way to guide consumers on how to recycle

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

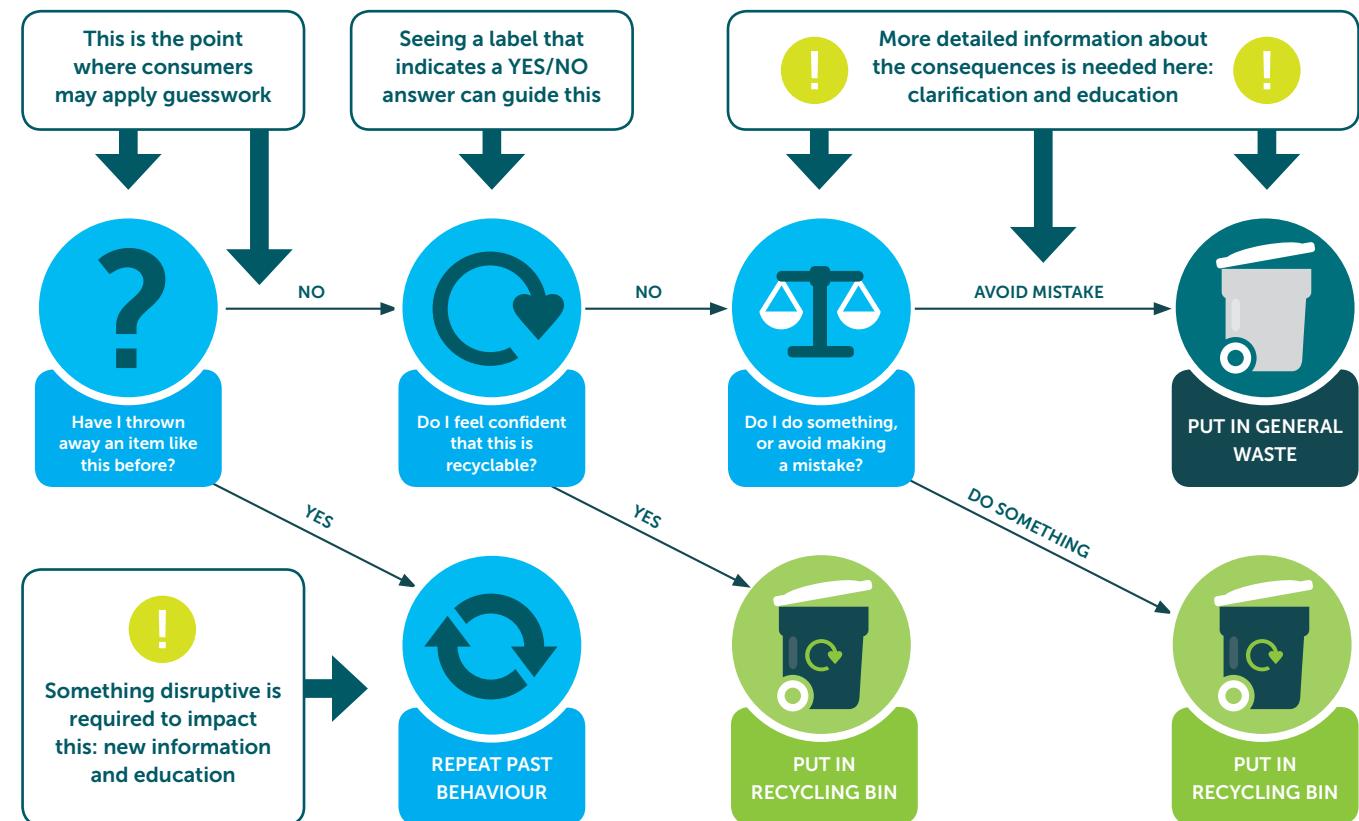
Without a recycling label to guide them, people make decisions based on their own values as they try to do the right thing.

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.

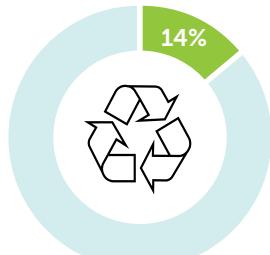
A clear recycling instruction label will grow people's confidence.

Consumers need different information at targeted touch points to influence behaviour



4. Clarity and consistency avoid confusion

How many consumers accurately recognise what each label means?



Mobius Loop

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



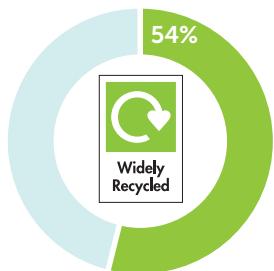
Green Dot

Means The retailer/manufacturer has paid towards recycling



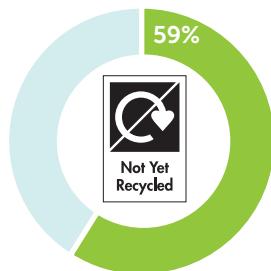
Tidy Man

Means It's about preventing litter



OPRL Label

Means It can be recycled where I live



OPRL Label

Means It can't be recycled where I live



OPRL Label

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

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.

Key findings:

Fewer than 1 in 7 understand the Mobius Loop, Green Dot or Resin Identification Codes

5. Actionable information is essential

People need specific, 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.



"Can I
recycle
this?"

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".



6. 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.

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:

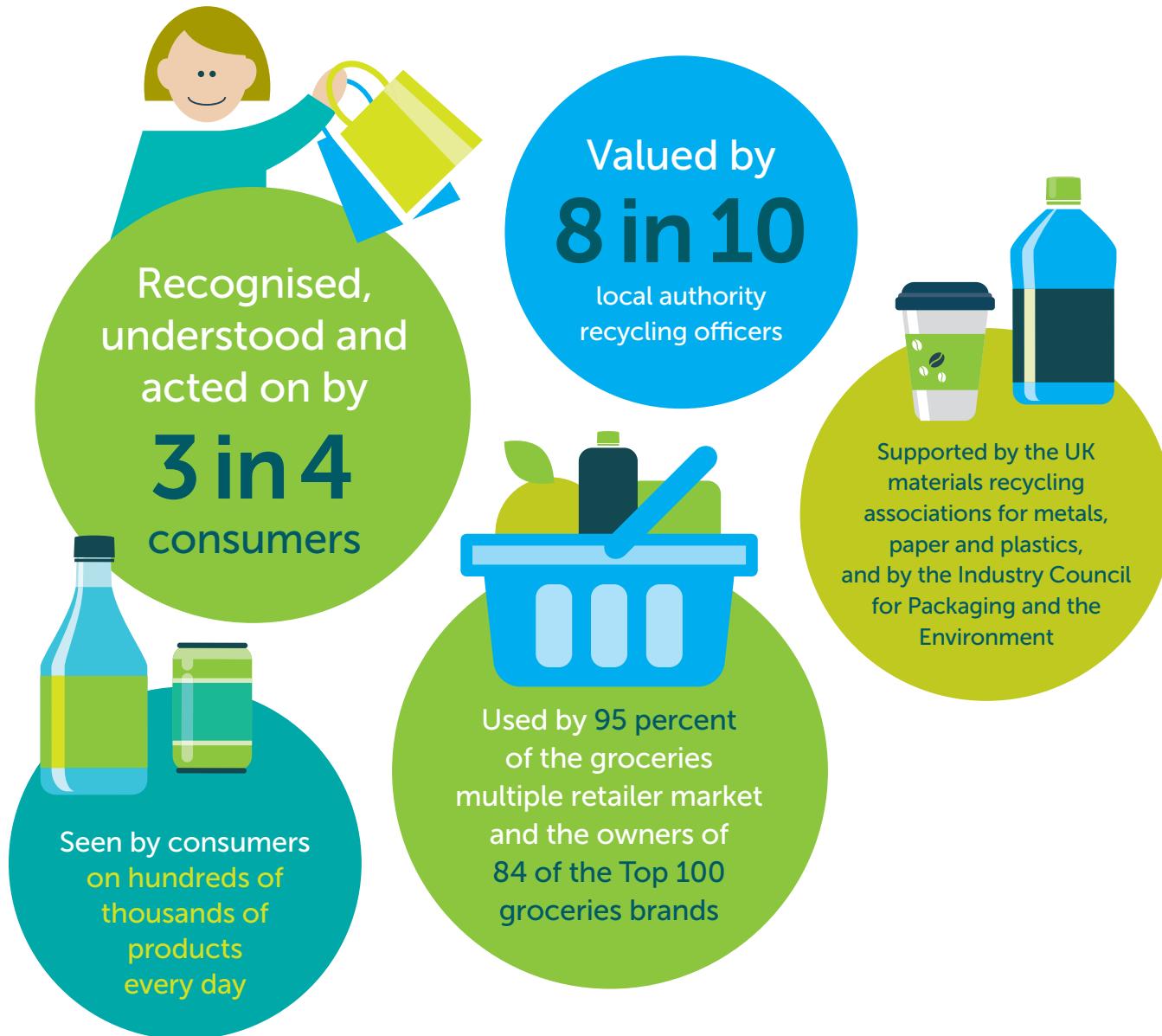
While on-the-go recycling varies considerably across the UK, retailers are increasingly providing take-back recycling facilities.

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

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



Only OPRL offers the labelling system that can deliver a mandatory scheme quickly and at least cost to business.

OPRL labels are:

- Action-oriented
- Evidence-based
- Widely used
- Widely recognised

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. Four studies were conducted in April 2017, November/December 2018 and June and October 2019.

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.

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 2020; Top 100 Groceries Brands 2019, 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.



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