

## **Appendix B**

### **Overview of feedback received as part of research undertaken by Eunomia in 2015**

#### **Bin Households – Committed Recyclers**

- Broadly happy with the service
- They'd like more instructional information about what to do with tricky items (different plastics etc)
- More information about what happens to recycling and, in particular, what the local benefits are.
- None of the participants knew what happens to recycling or any benefits that Manchester had achieved as a result. In parallel, some myths were prevalent (e.g. recycling is shipped to China and/or landfilled).
- Incentives for recycling (a topic that was prompted upon because it was not raised spontaneously) are not considered necessary – participants feel that recycling is important to do and don't think that it should be subject to a financial reward.

#### **Bin Households – Aware but undermined**

- Issues with service included missed collections and about neighbours not doing the right thing
- More validation and recognition of their efforts from the council. Some participants spoke of a 'quid pro quo' where the council show that they are doing their bit so that residents buy into it more (rather than feeling like they are being required to do it).
- Specific information about the outcomes and local benefits of recycling (i.e. why they are doing it and what good it does). Some participants noted getting feedback on how much money the council had saved, or any local parks or facilities that had been funded with recycling monies.
- Unlike the committed group, participants here liked the idea of personal incentives, since it aligns with their belief they should be thanked for recycling. However, they have relatively high expectations of what the monetary value of the incentives would be and may be de-motivated by small amounts. Of all the groups, they were the least enthusiastic about community-level incentives, fearing that free riders would benefit from their hard work.
- Bin calendar only piece of information that they pin up, obscuring any information on the reverse side.

#### **Apartments**

Issue with the systems of recycling in flats – bin storage rooms and getting materials to them

- Participants thought that recycling messages are important (both in terms of what can and can't be recycled, as well as hearing about the benefits achieved), but almost universally felt that leaflets were not appropriate for them. Instead, they proposed utilising apps, facebook and twitter.

### **Communal Containers**

Among this audience, some felt that recycling can be difficult and depressing, and symptomatic of wider problem issues in the area - such as fly tipping, anti-social behaviour and a poor street scene.

- Positive towards community incentives, especially if these are linked back to the street scene (e.g. if the street recycles then the bins are collected/cleaned more frequently).
- Positive feedback about how much the street is recycling. Many like measures linked to their children (e.g. education through schools, or certificates).
- Communications materials without system change (of some kind) would not have a great impact

### **R4GM – Behavioural Insight Research for Greater Manchester**

#### **Recycling Tracker**

WRAP have developed a recycling tracker which explores UK householders' knowledge, attitudes and behaviour in relation to recycling. The WRAP waste tracker is a customer survey carried out annually by WRAP to gather data on resident's current attitudes, knowledge and behaviour in relation to recycling. 2017 was the first year that Greater Manchester has had a statistically representative sample. This allows progress of behavioural indicators to be tracked and provides key insights to inform service delivery. This includes:

- % of effective recyclers
- % of householders to whom confusion is a barrier
- % of householders to whom lack of motivation is a barrier
- Missed-capture (and reasons for it)
- Contamination (and reasons for it)
- Confidence and certainty of action
- Residents relationship with recycling
- Information and advertising
- Communication material recognition

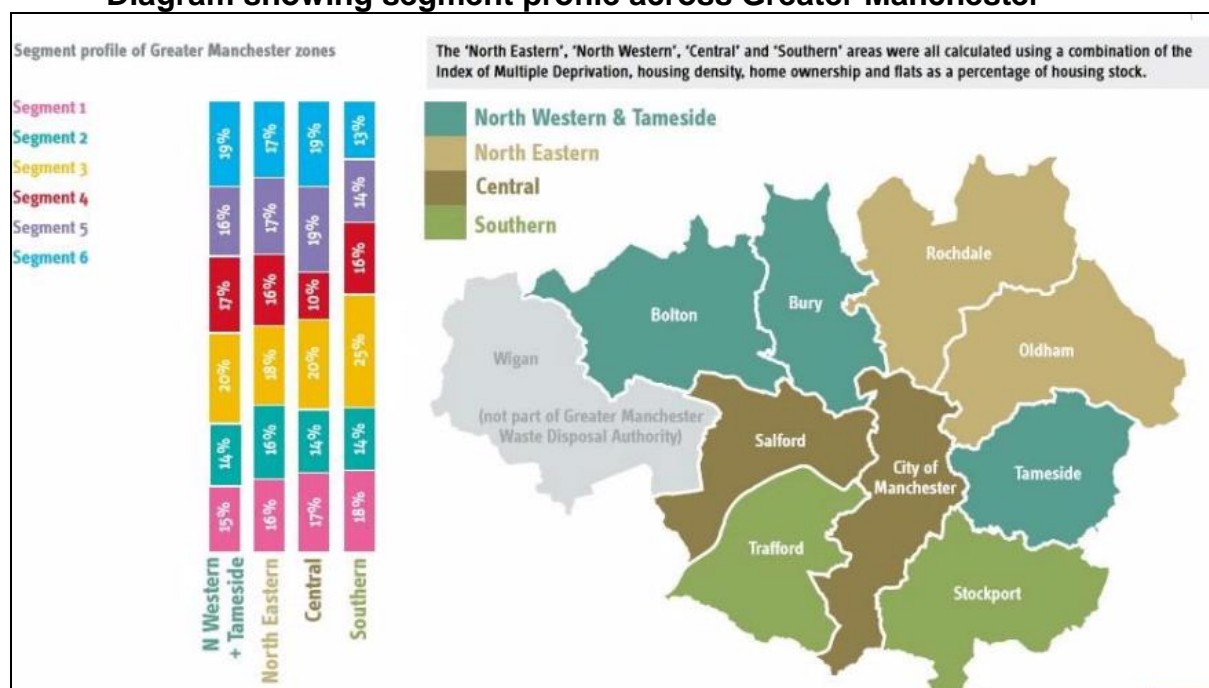
Based on results of the WRAP tracker, there is potential to increase capture – 53% of households in Greater Manchester are not recycling all the items they can in their area. Key materials missed are; foil, 34% of households; aerosols, 21% of households; plastic cleaning bottles, 17% of households and plastic detergent bottles, 14% of households. Recyclable items from across the rooms in a house are still not being fully captured. The bedroom and bathroom are key areas with 22% of personal care bottles such as shampoo not being recycled. There is potential to increase food waste capture. 55% of food waste service users say they sometimes throw food in the general waste, 1 in 5 throw away tea, coffee, egg shells, and unopened food past its best. Of those receiving a food waste service 26% don't use it. Barriers include the perception that recycling food waste is messy / smelly, too busy, don't produce enough, hygiene and not wanting the caddy in their kitchen.

Contamination remains an issue and consumers are still confused about what can and can't be recycled through local services. Only 12% of the Greater Manchester population did not contaminate at all, in their mixed recycling bin. Key items are plastic tubs (42%), plastic pots (39%), clear trays (31%), plastic wrapping (31%), plastic bags and wrapping (29%). A number of serious contaminants are also an issue including dirty pizza boxes (33%), drinking glasses (24%), pots pans and cutlery (16%). 65% of residents are sure that we collect pots and tubs for recycling. 57% of residents regularly or from time to time look at on pack recycling labels (OPRL) for advice – which is generally not in line with services provided by Councils.

## Segmentation

Marketing segmentation is used widely across the marketing industry. Following research, WRAP have provided segmentation profiles of Greater Manchester (GM) residents to enable us to tailor our communications. The profiles focus on resident's behaviours and characteristics towards recycling and provides insight into how each group prefer to receive information. The profiles are being used in day-to-day communications and will continue to be embedded into future campaigns. GM is split into 6 segments based on resident's attitude and behaviours to recycling. Understanding the target audience will allow for delivery of targeted campaigns and moves away from "one size fits all" approach. Communication methods, platforms, messaging and tone can be moderated to target specific segments. This means that campaigns can be focused on audiences where there is the biggest potential for change.

**Diagram showing segment profile across Greater Manchester**



Key findings from Greater Manchester's recycling segmentation profile show that Segment 3 are the largest in Greater Manchester. Segments 3 and 5 are keen to recycle 'difficult' items and Segments 3, 4 and 5 want to learn about food waste. Segments 3, 4 and 5 want to learn more about how recyclable items are turned into something new. Segment 1 are the least motivated to recycle, have the lowest

capture rate and have the worst contamination. Non-council sources are the only way to reach Segment 1. Overall local councils' websites are the most popular source of information. Leaflets issued by local councils are used by a third of people across Greater Manchester. Segments 2 and 4, are the segments least likely to search out information about recycling. Commuter newspapers are popular in the region – the Manchester Evening News and The Metro is read by 1 in 4 people in Greater Manchester.

**Targeting communications by property sector**

WRAP have identified that 52% of all moves across GM are into the private rented sector. Renters are predominately segment 1 "What's in it for me?" whereas home owners are predominantly segment 5 "Global ideas". 54% of people prefer to receive information about recycling services within their first week of moving home and their preferred way of receiving info is a leaflet from the council. WRAPs research suggests that there is a 3 month window of opportunity for communication after relocation. Major life disruptions can be a good opportunity to embed new behaviours. People in social or privately rented properties prefer information to be provided by the housing association or landlord.