



Llywodraeth Cymru
Welsh Government

RESEARCH, DOCUMENT

Public attitudes on the changes to workplace recycling (summary)

This research surveyed a sample of the Welsh population in November 2023, 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](#).

Questions on this topic have been included in two waves of the Beaufort Omnibus Survey, the most recent of which was in November 2023. Similar questions were included in the Beaufort Omnibus wave in February-March 2023 and a summary of findings was published on 24 July 2023 ^{[[footnote 1](#)]}, providing an indication on trends in attitudes of the sample at this time. Questions regarding the ban on single use plastics was removed as this legislation has now become law in October 2023. In this November 2023 survey additional questions were added regarding whether respondents had heard or seen marketing or communications about the legislation change to workplace recycling. At the time of surveying, 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 24 July 2023.

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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 these 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 (147).

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.

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

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participants' preferred language.

Fieldwork took place between 6 and 26 November 2023. A total of 1,000 interviews were completed and analysed.

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 29% of those surveyed in November (from 12% of people surveyed last March^[footnote 4]). Decision-making respondents in businesses, public sector organisations and charities were more likely to be aware of changes to the law than members of the public.
- When prompted with a description of the new workplace recycling legislation,

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almost half of those surveyed in November (47%) had heard of the law (up from 26% of survey respondents in March).

- 15% of people surveyed in November said they had heard of the legislative changes, while 32% of respondents had heard of it but were not sure of the details. Meanwhile, 51% of people surveyed in November had not heard of the law change (down from 73% of respondents in March).
- Business, charity or public sector decision-makers surveyed were more likely than the overall sample to be aware of the new law when prompted (75% of decision-making respondents were aware, compared to 47% of the total sample surveyed).
- Although awareness was greater in the November 2023 sample compared with the March 2023 sample, there was minimal difference in attitudes towards the legislative change between the two survey waves. For example, 75% of respondents were in favour of the law in the November survey – which is almost unchanged from the survey conducted in March (77%).
- In both the March and November survey waves, decision makers in businesses, charities, or public sector organisations surveyed were more likely to not support the new law than the overall sample. 13% of decision makers surveyed in November were against the legislation changes, compared with 6% of the overall sample. Meanwhile, in March, 15% of decision makers surveyed did not support the changes compared with 6% of the overall sample.
- 22% of respondents surveyed in November had recalled seeing advertising, communications, or marketing about the new law without viewing prompts (compared to 9% surveyed in March 2023). Unprompted awareness of advertising was higher among decision-making respondents in November (at 40%).
- In November 2023, 16% of those interviewed recalled seeing the campaign before when they were prompted with a selection of campaign visuals, rising to 35% of decision-makers surveyed.
- Prompted recall of the TV advert stood at 22% of the overall sample in November, this was higher in decision-making respondents at 33% recalling

the advert.

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 \(summary\)](#)

Contact details

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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