

*Monitoring Welsh
Businesses' Views on
Workplace Recycling'
April 2023 & 2024 Studies*



Prepared for:
Welsh Government

Prepared by:
Beaufort Research



Llywodraeth Cymru
Welsh Government

Contact details

Agency contacts: Fiona McAllister / Owen Knight

Workplace Recycling Surveys – April 2023 and April 2024 – Summary Report

October 2024

Beaufort Research

2 Museum Place

Cardiff

CF10 3BG

(029) 2037 8565

enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

Terms of Contract

Unless otherwise agreed, the findings of this study remain the copyright of Beaufort Research Ltd and may not be quoted, published or reproduced without the company's advance approval.

Approval to quote or publish will only be withheld on the grounds of inaccuracy or misrepresentation.

Any approved publication must detail: Beaufort Research Ltd as provider, sample size and field dates.

© Beaufort Research Ltd 2024

This research was undertaken in accordance with ISO 20252



Contents

| | |
|---|----|
| 1. Introduction and objectives..... | 4 |
| 2. Methodology..... | 4 |
| 3. Research findings..... | 6 |
| 3.1 Recycling behaviour | 6 |
| 3.2 Awareness and knowledge of changes to the law | 7 |
| 3.3 Views on the law change | 8 |
| 3.4 Informedness and preparedness | 9 |
| 3.5 Communications awareness and impact | 12 |
| Appendix – April 2024 Research Questionnaire..... | 13 |

1. Introduction and objectives

In April 2024, the Welsh Government introduced legislation that requires all businesses, public sector organisations (such as government and the NHS) and charities in Wales to separate their recyclable materials in a similar way that most householders do. The law is aimed at increasing the amount of waste that gets recycled in Wales.

Beaufort was tasked with exploring business awareness and attitudes to the legislative change, both prior to its implementation in April 2023 and shortly after its introduction in April 2024. Recall and impact of the advertising campaign was also measured in the surveys.

2. Methodology

Telephone surveys were conducted pre- and post-campaign with separate samples of around 500 small and medium-sized businesses (SMEs) across Wales. The surveys were structured to replicate the Beaufort Wales Business Omnibus¹ in terms of the way they are sampled, including quotas and weighting.

The samples of both surveys were designed to reflect the characteristics of SME business establishments located in Wales in terms of business activity types, business size (in terms of number of employees) and regional spread. Business establishments were identified through ownership of a business telephone line.

“Businesses” were defined using UK Standard Industrial Classification (2007) as follows:

Table 1 – Business Activities

| Business Activities included | SIC Category |
|---|--|
| <i>Agriculture, Fishing, Mining & Utilities</i> | A, B, D, E |
| <i>Manufacturing</i> | C |
| <i>Construction, Transport/communications</i> | F, H, J (61 only) |
| <i>Wholesale & Retail</i> | G |
| <i>Finance, Real estate/business activities</i> | J (62, 63 only), K, L, M, N |
| <i>Hotels, Restaurants and other services</i> | I, J (58, 59, 60 only), R, S (95, 96 only) |

Categories O (Public administration/defence), P (Education), Q (Health/Social Work), S (94 only: Membership organisations), T (Private households) and U (Extra-territorial organisations) were excluded from the survey, to ensure the sample consisted of only private sector businesses to maintain consistency with the Wales Business Omnibus survey.

SMEs were defined as businesses with up to 250 employees (full or part-time) at the location contacted, and eligible respondents were defined as the Manager, Proprietor, Owner, Managing Director or other senior manager.

¹ [Business Omnibus - BeaufortResearch](#)

The survey included questions about business size, categorized by annual turnover as follows: less than £100k, between £101k and £500k, and over £501k. It also classified businesses based on number of employees: one employee, 2-9 employees, and 10 or more employees.

A sample of businesses was selected randomly by Market Location², a UK-based data and marketing company specializing in providing high-quality business data. Businesses within each activity group and region were then randomly contacted and interviewed until the quota targets were met. Interlocking quotas were set on business activity and size (in terms of number of employees) within region based on the number of actively trading businesses in Wales supplied by Market Location

The questions for the survey are included in the Appendix. The questionnaire was available in English or Welsh at the participant's choice. The questionnaire featured both closed and open-ended (free text) questions. During the analysis phase, responses to open-ended questions were systematically coded and categorized by themes, enabling a quantitative measure of the responses to be made.

For the baseline survey a total of 503 survey responses were collected between 17 and 28 April 2023; for the post-campaign survey, 502 surveys were carried out between 15 and 30 April 2024.

Full data tabulations from the survey have been provided to the Welsh Government in a separate technical report.

² [Market Location](#)

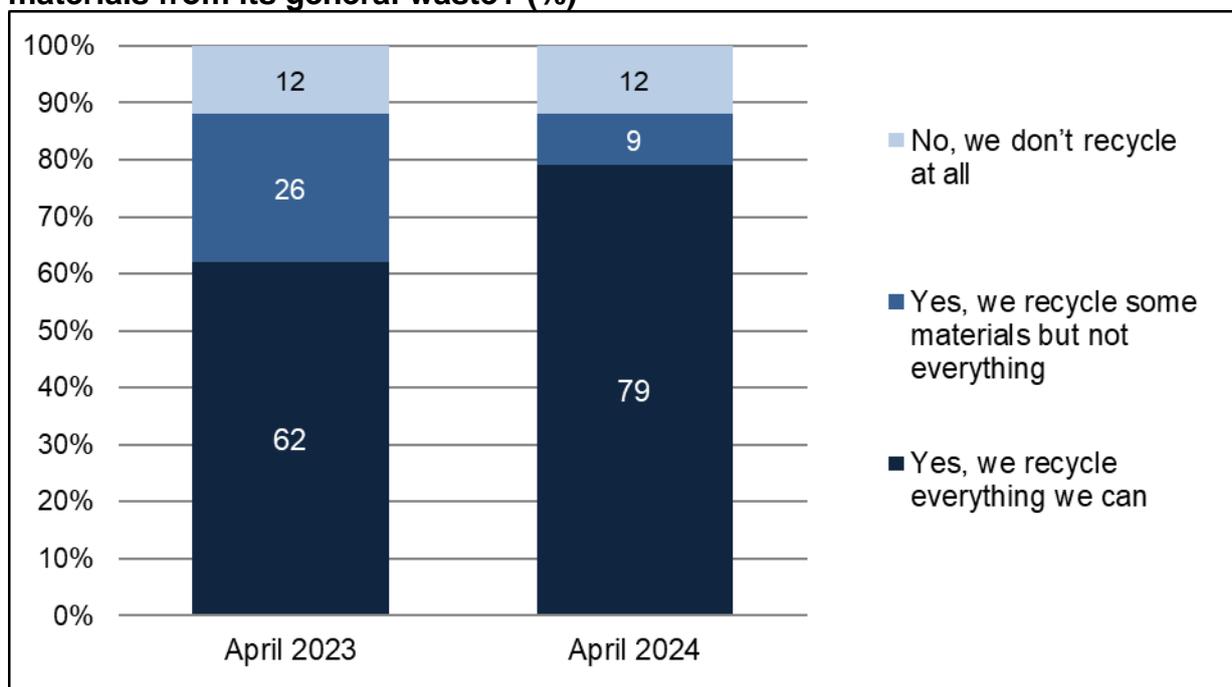
3. Research findings

3.1 Recycling behaviour

The first question established whether SMEs surveyed were currently separating out recyclable materials from their general waste at the time of the survey.

In April 2024, almost 8 in 10 Welsh SMEs surveyed (79%) said they recycled everything they can (see figure 1) - an increase from around 6 in 10 (62%) since April 2023. A consistent proportion of slightly more than one in ten of those surveyed (12%), said they did not recycle at all, however.

Figure 1: Does your business or organisation currently separate out recyclable materials from its general waste? (%)



Base: all respondents (April 2023 = 503, April 2024 = 502)

In April 2024, larger organisations, by turnover, were more likely to recycle everything possible, with 86% of those surveyed with a turnover exceeding £500k doing so, compared to just 72% of those with a turnover under £100k. A similar trend was observed with employee numbers: businesses surveyed with two or more employees had a higher recycling rate (82%) compared to those with just one employee (68%).

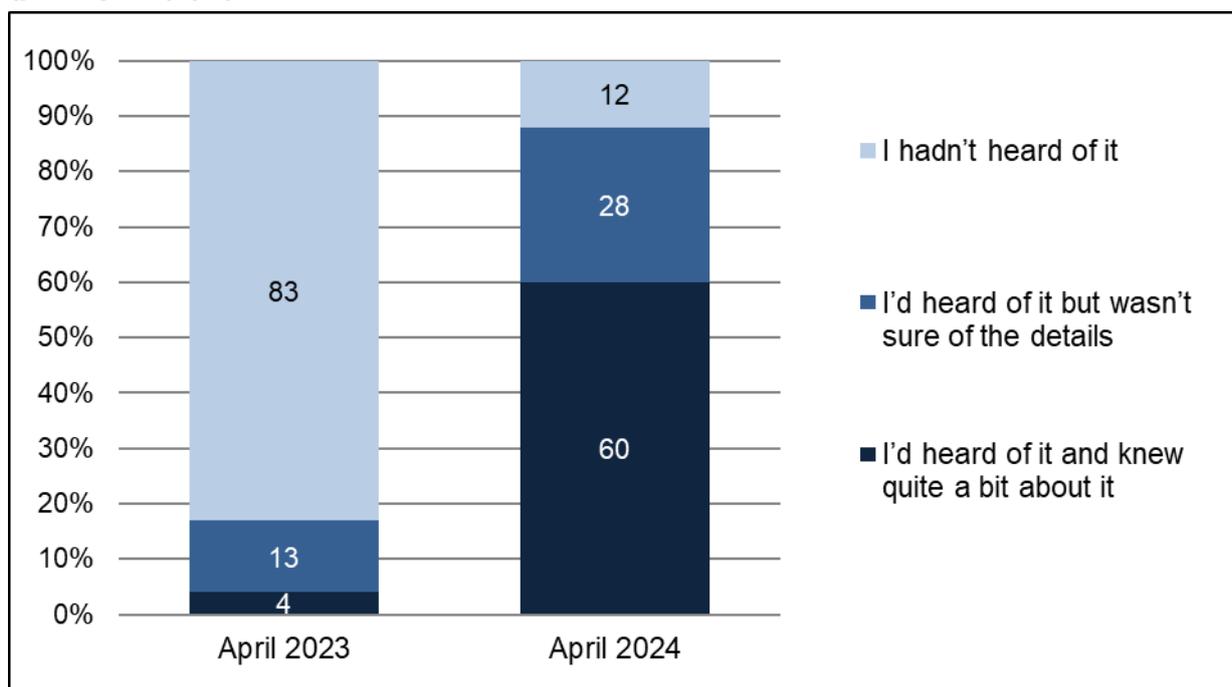
In April 2024, respondents who were least likely to recycle everything possible in April 2024 were those in *Construction, Transport/communications* (64% doing so) and *Agriculture, Fishing, Mining & Utilities* (76%), while businesses in *Manufacturing* (87%) and *Wholesale & Retail* (84%) sectors were most likely to do so.

3.2 Awareness and knowledge of changes to the law

Unprompted awareness of any (forthcoming) changes to the law among Welsh SMEs surveyed increased substantially from 13% in April 2023 (pre-campaign), to almost 85% in April 2024 (post-campaign).

Reflecting this, when prompted with an explanation of the law change³, almost 9 in 10 (88%) SMEs surveyed in Wales had heard about the new workplace recycling law in April 2024 - up from 17% in April 2023. Three fifths (60%) also said they 'knew quite a bit about it' post-campaign (see figure 2).

Figure 2: Before today, how much did you know about this new law? (prompted) (%)



Base: all respondents (April 2023 = 503, April 2024 = 502)

When prompted, smaller organisations surveyed (both by turnover and number of employees) were the least likely to be aware of the new law that had been introduced in April 2024. Among businesses surveyed with a turnover of less than £100k, 18% had not heard of it, compared to 5% of those surveyed with a turnover exceeding £500k. Additionally, 20% of organisations surveyed with only one employee were unaware of the law, in contrast to 3% of those with 10 or more employees.

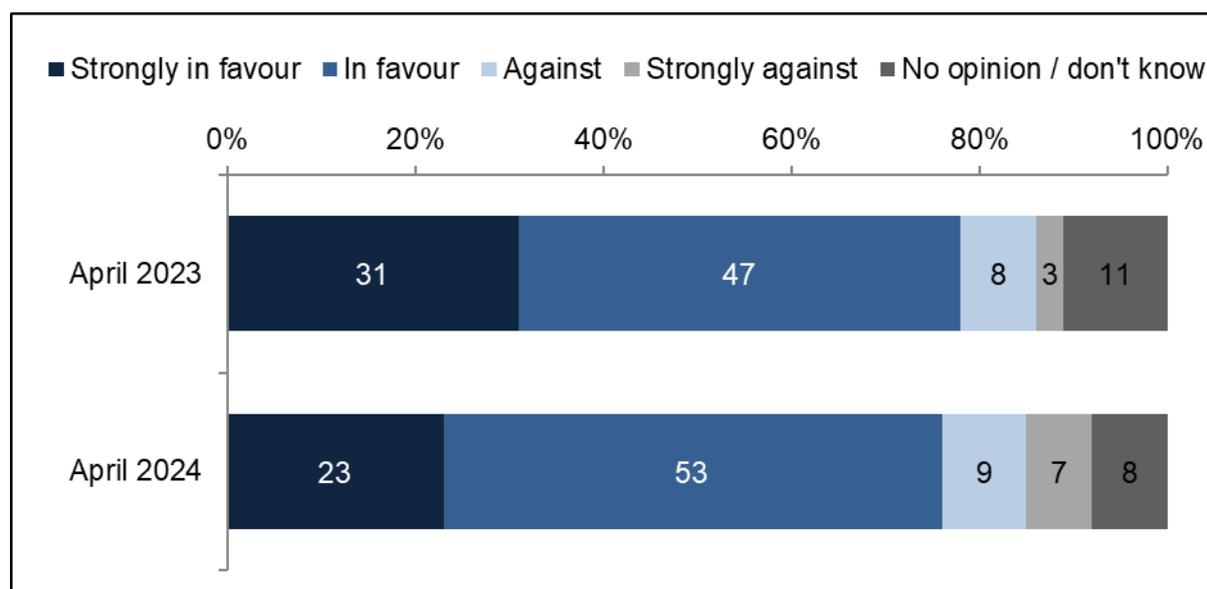
Reflecting their recycling practices, respondents in the *Construction*, *Transport/Communications*, and *Agriculture, Fishing, Mining & Utilities* sectors were the least likely to report having heard of the new law and feeling well-informed about it. Only 49% and 46% in these sectors, respectively, said they had heard of it and knew quite a bit about it, compared to the overall average of 60%

³ Explanation provided: "In April 2024 the Welsh Government introduced legislation that requires all businesses, public sector organisations (such as government and the NHS) and charities in Wales to separate their recyclable materials in a similar way that most householders do. The law is aimed at increasing the amount of waste that gets recycled in Wales."

3.3 Views on the law change

Support for the new law remained relatively consistent over time and across survey waves. In April 2024, 76% of SMEs surveyed said they were in favour of the law, compared to 78% surveyed in April 2023. However, the percentage of respondents 'strongly in favour' declined from 31% in April 2023 to 23% a year later. Correspondingly, the proportion of respondents opposed increased slightly, from 11% to 16%.

Figure 3: Extent to which SMEs were in favour of, or opposed to, the new law (%)



Base: all respondents (April 2023 = 503, April 2024 = 502)

Respondents in favour of the new law were asked why they were in favour of the new law, and provided free text responses. The main reasons given related to general comments about being supportive of recycling (mentioned by 32% of the 382 SMEs in favour of the new law) and environmental concerns (22%). A list of the main reasons given is shown in figure 4 below:

| Figure 4: Main reasons for being in favour of the new law (unprompted) | |
|--|----------------|
| | % ⁴ |
| Supportive of recycling (good, right thing to do, all helps, important, etc.) | 32 |
| Environmental concerns (good for the environment, planet, climate etc.) | 22 |
| Importance of reducing waste and landfill usage | 11 |
| Already recycle / recycle as much as possible (at work / unspecific) | 8 |
| Already recycle at home / businesses should recycle as well | 7 |
| Concerns about cost / financial implications | 6 |
| The more the better / need to recycle more / should recycle as much as possible / everything | 6 |
| Everyone should do it / encouragement of others to do it | 5 |

Base: those in favour of the new law – April 2024 (382)

⁴ Responses could be assigned to multiple reason categories

Conversely, when asked why they were opposed to the new law, the main unprompted concerns mentioned related to cost / financial implications (26% of 77 SMEs opposing the new law), complexity / difficulty of the recycling process or sorting (19%), and time constraints / workload burden (14%). Other main reasons given are shown in figure 5 below:

| Figure 5: Main reasons for opposing the new law (unprompted) | |
|---|----------------------|
| | %⁵ |
| Cost / financial implications | 26 |
| Complexity / difficulty of the recycling process or sorting | 19 |
| Time constraints and workload burden | 14 |
| Recycling already being done (no need for gov't legislation / regulation) | 13 |
| Opposition to government control, interference, regulations, red tape | 8 |
| Practical challenges and implementation issues (other / unspecified) | 8 |
| Lack of support / assistance from the government | 7 |
| Lack of space / storage issues | 6 |
| Lack of knowledge and information (don't know enough about it) | 5 |
| Difficulty getting staff or customer compliance / buy in | 5 |

Base: those opposed to the new law – April 2024 (77)

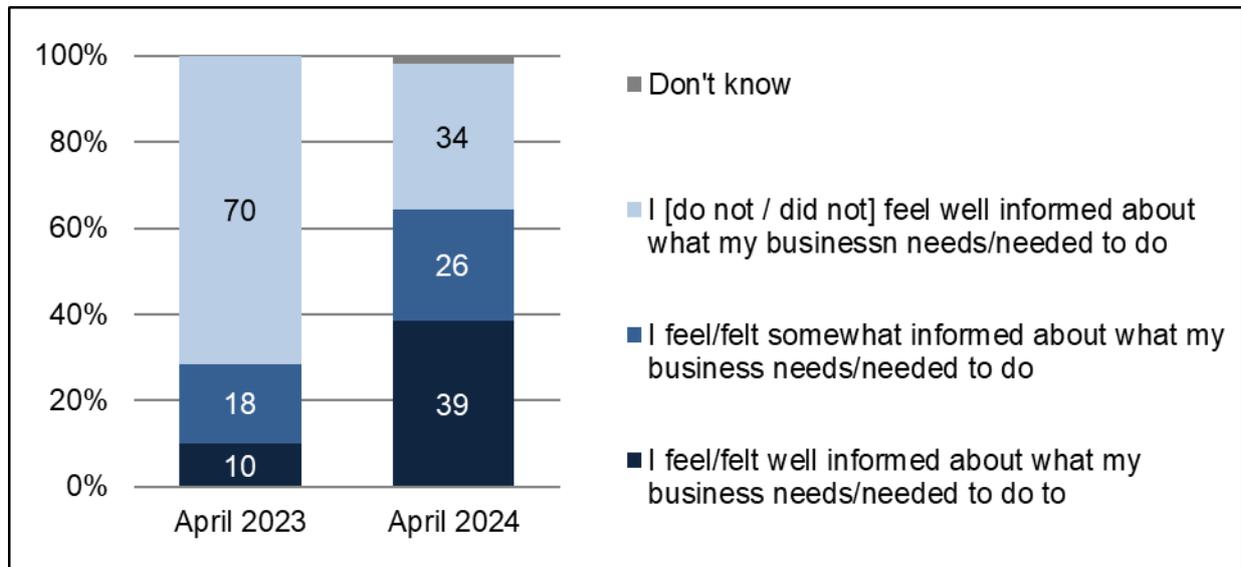
3.4 Levels of how informed and prepared SMEs were

The survey also examined how *well informed* SMEs felt about the actions they needed to take to prepare for the recycling law.

In April 2024, approximately one-third (34%) of SMEs surveyed reported feeling uninformed about the actions required to prepare for the new law, a substantial decrease from 70% in April 2023. Meanwhile, the percentage of SMEs that felt well-informed had increased nearly fourfold, rising from 10% of respondents in April 2023 to 39% in April 2024. None the less, post-campaign the proportion feeling uninformed is at a similar level to those that feel well-informed (34% vs. 39%).

⁵ Responses could be assigned to multiple reason categories

Figure 6: How well informed do / did you feel about the actions your business needs/needed to take to prepare for the new recycling law? (%)



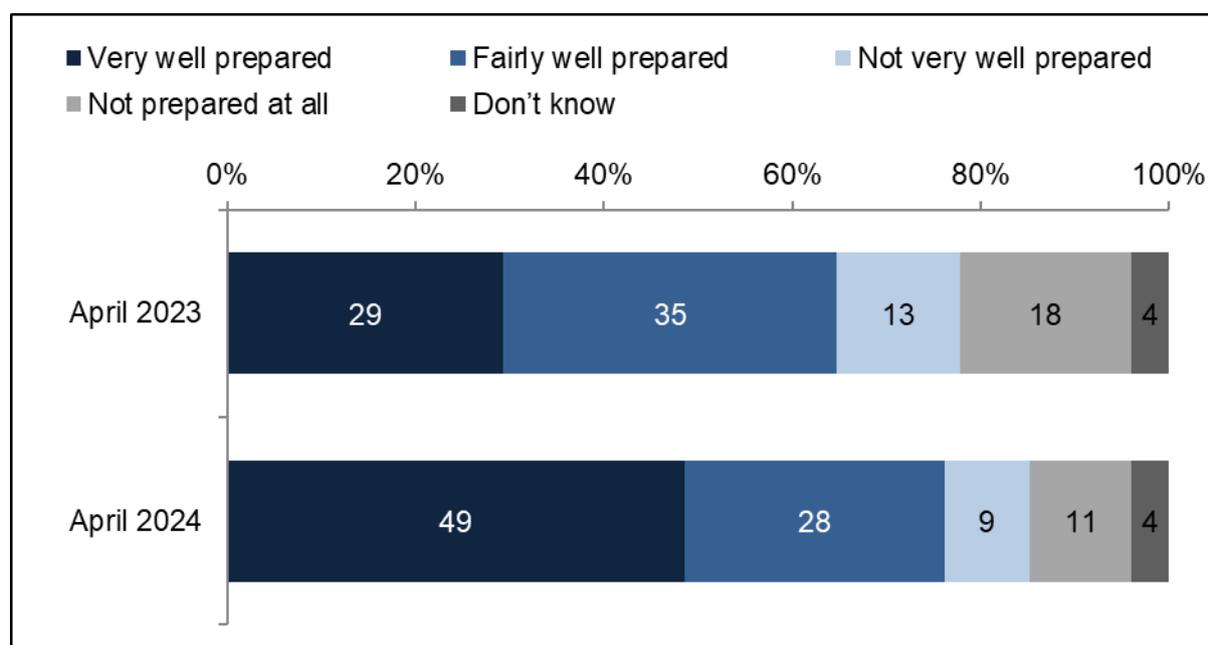
Base: all respondents (April 2023 = 503, April 2024 = 502)

In April 2024, smaller businesses (both by turnover and number of employees) were the least likely to feel well informed about the actions necessary to prepare for the new recycling law. Among respondents with a turnover of less than £100k, 40% reported feeling uninformed, while 35% of businesses surveyed with only one employee felt the same. In contrast, only 27% of businesses with a turnover exceeding £500k and 24% of those with 10 or more employees felt uninformed.

By sector, SMEs surveyed in the *hotels and other services* sector were the most likely to have felt well informed, with 45% reporting this, compared to just 27% in the *Construction and Transport/Communications* sector.

When asked about their *preparedness* for the new recycling law, three-quarters (76%) of SMEs surveyed reported feeling either 'very' or 'fairly' well prepared by April 2024, an increase from 64% in April 2023. Notably, the percentage of those who felt 'very well prepared' rose from 29% to nearly half of respondents (49%). Additionally, around one in ten (11%) indicated they were not prepared at all, down from 18% in April 2023.

Figure 7: How well prepared is / was your business or organisation for the new recycling law? (%)



Base: all respondents (April 2023 = 503, April 2024 = 502)

As was the case with how informed SMEs felt, smaller businesses by turnover were the least likely to feel prepared for the new recycling law. Among those with a turnover of less than £100k, 71% reported being either very well or fairly well prepared, while 84% of businesses with a turnover exceeding £500k felt the same.

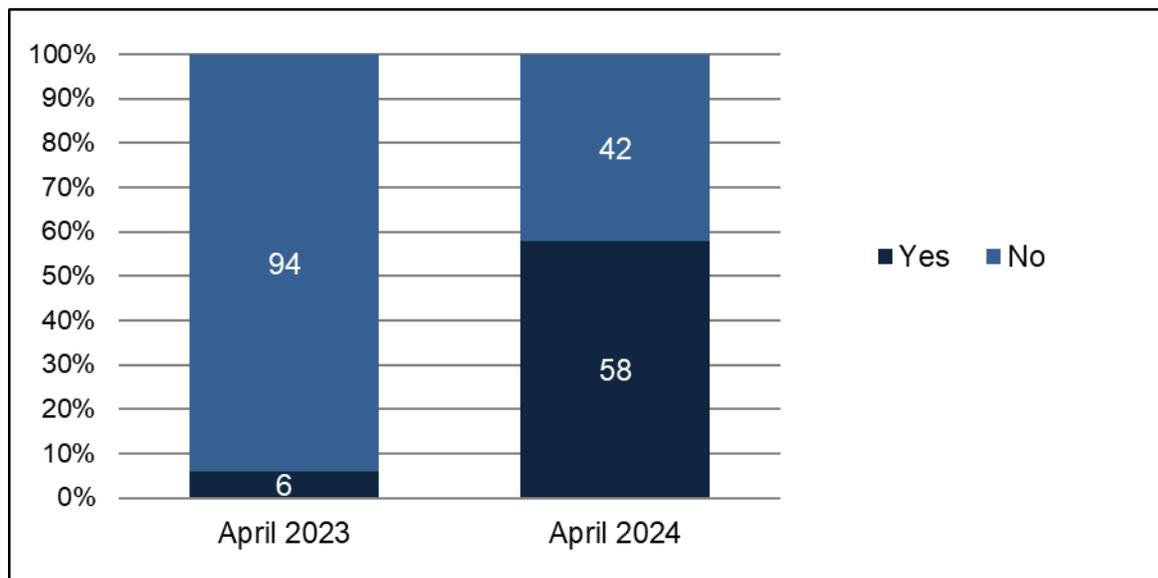
By sector, SMEs in the *Hotels and other services* sector were the most likely to have felt prepared, with 82% of respondents from this sector reporting this, compared to 67% in the *Agriculture, Fishing, Mining & Utilities* sector, and 68% in the *Construction and Transport/Communications* sector.

3.5 Communications awareness and impact

The survey also measured awareness of advertising, communications or marketing about the new law and any actions taken as a result of seeing the campaign.

By April 2024, almost three fifths (58%) of Welsh SMEs surveyed had seen or heard communications about the new law - an increase from 6% recorded in the baseline survey in April 2023.

Figure 8: Have you seen or heard any advertising, communications or marketing about this new law recently? (%)



Base: all respondents (April 2023 = 503, April 2024 = 502)

By April 2024, as a result of seeing or hearing the campaign, two-fifths (40%) of the 331 Welsh SMEs surveyed who were aware of the campaign said they had taken action. The most common actions included:

- 21% contacting a private waste carrier
- 15% reaching out to their Local Authority
- 15% accessing the Welsh Government
- 6% visiting another website.

Base: all aware of the campaign (April 2024 = 331)

Appendix – April 2024 Research Questionnaire

SAMPLE INFORMATION: Region / No of Employees / SIC Group:

READ OUT

Good morning\afternoon, my name is XXXXXXXXXXXXXXXX of Beaufort Research. Could I speak to the owner or Managing Director please?

YOU MAY CONDUCT THE INTERVIEW WITH THE OWNER, MANAGING DIRECTOR (MD), PROPRIETOR, CEO, PERSON RESPONSIBLE FOR FINANCIAL DECISIONS OR OTHER DIRECTOR

Yes - CONTINUE

No - ARRANGE APPOINTMENT IF POSSIBLE AND CLOSE

ASK SENIOR MEMBER OF STAFF:

Good morning\afternoon, my name is XXXXXXXXXXXXXXXX of Beaufort Research. We are conducting a short survey on behalf of the Welsh Government on issues concerning businesses in Wales and I would like to ask you a few questions. It should take no more than 10 minutes or so. All your responses will be strictly confidential.

Any personal information we collect such as age and gender will be used for research purposes. Your answers will be combined with other people we interview, so that research findings can be reported among aggregated groups (e.g. 16-34s, men, etc..).

Do you have time to answer some questions please? You have the right to withdraw your consent to take part at any point.

QRA. Are you happy to continue (now or at another time)?

01: Yes

02: No

RQ1. I have the questions for you available in Welsh or English - which would you prefer?

01: Prefer English

02: Prefer Welsh

QA. Can I ask your position within your company\organisation?

PROBE: What is your current job title?

QB. And could you tell me the main activity and nature of your business\organisation at your location?

PROBE FOR DETAIL: (e.g. "What is manufactured?", etc.)

QC. Can you tell me how many people are permanently employed in total by your business AT YOUR LOCATION, both full and part time and including yourself?

- 01: One, just myself
- 02: 2 to 4
- 03: 5
- 04: 6 to 9
- 05: 10
- 06: 11 to 24
- 07: 25 to 49
- 08: 50 to 99
- 09: 100 to 149
- 10: 150 to 199
- 11: 200 to 250
- 12: 251+ → THANK AND CLOSE

Q1. Does your business or organisation currently separate out recyclable materials from its general waste? *Invert scale between interviews*

- Yes, we recycle everything we can
- Yes, we recycle some materials but not everything
- No, we don't recycle at all

Q2. Are you aware of any changes to the law in Wales around recycling for workplaces?

- Yes
- No
- Don't know

Q3. In April 2024 the Welsh Government introduced legislation that requires all businesses, public sector organisations (such as government and the NHS) and charities in Wales to separate their recyclable materials in a similar way that most householders do. The law is aimed at increasing the amount of waste that gets recycled in Wales.

Before today, how much did you know about this new law?

I'd heard of it and knew quite a bit about it
I'd heard of it but wasn't sure of the details
I hadn't heard of it
Don't know

Q4. What's your view on this new law – are you...?

Strongly in favour - Ask Q5a
In favour - Ask Q5a
Against - Ask Q5b
Strongly against - Ask Q5b
No opinion - Go to Q6
Don't know - Go to Q6

Q5a. Why do you say that [if in favour]? *Record verbatim*

Q5b. Why do you say that [if against]? *Record verbatim*

ASK ALL

Q6. How well informed did you feel about the actions your business/organisation needed to take to prepare for the new recycling law that came into force in April 2024? *Read out – scale to be inverted between interviews*

- I felt well informed about what my business/organisation needed to do to
- I felt somewhat informed about what my business/organisation needed to do
- I did not feel well informed about what my business/organisation needed to do
- Don't know

ASK ALL

Q7. How well prepared was your business or organisation for the new recycling law that came into force in April 2024? *Read out – scale to be inverted between interviews*

- Very well prepared
- Fairly well prepared
- Not very well prepared
- Not prepared at all
- Don't know

ASK ALL

Q9. Here are some reasons businesses and organisations might support the new law. Which of these do you agree with, if any? *Read out – code all mentioned*

It's better for the environment

It will reduce the amount of waste going to landfill / incineration

It could save businesses/organisations money

It's good for businesses/organisations to do their bit

Employees will support it

It's long overdue

It demonstrates businesses'/organisations' environmental credentials

It's important for businesses/organisations to take action on climate change

None of these

Don't know

ASK ALL

Q10. Here are some reasons businesses and organisations might not support the new law. Which of these do you agree with, if any? *Read out – code all mentioned*

It costs more for businesses/organisations to do

It's a lot of hassle

There wasn't enough support available to help businesses/organisations get ready

Lack of space for bins

It's not always easy to know what can and can't be recycled

Employees are resistant

There wasn't much time to get ready for the new law

It won't make any real difference to the environment

None of these

Don't know

Q11. Have you seen or heard any advertising, communications or marketing about this new law recently?

- Yes
- No

ASK IF AWARE OF ADVERTISING/COMMS/MARKETING AT Q10

Q12. Where did you see or hear this advertising, communications or marketing? Select all that apply

- Direct mail / letter or leaflet through the door
- Direct email or text message
- Newspaper / magazine advert
- Newspaper / magazine article
- Online advert
- Online news story
- Outdoor digital billboards and screens
- Posters
- Radio advert
- Radio news
- Social media (e.g. Facebook, Instagram, Twitter)
- TV advert
- TV news / programme
- Word of mouth

- Other (please specify) _____
- Don't know

ASK IF AWARE OF ADVERTISING/COMMS/MARKETING AT Q10

Q13. What was the main message of the advertising, communications or marketing that you saw? What was it trying to say? WRITE IN VERBATIM

- Don't know

ASK ALL – play radio advert (English version to those taking interview in English; Welsh version to those taking interview in Welsh)

Q14. Have you heard this advert recently?

- Yes
- No

ASK ALL AWARE OF CAMPAIGN

Q15. Which of these actions, if any, did you take as a result of seeing/hearing the campaign? *Read out – can multicode*

- Accessed the Welsh Government website
- Accessed another website (please specify) _____
- Contacted a business representative body (e.g. a Chamber of Commerce, CBI Wales, Federation of Small Business Wales)
- Contacted a private waste carrier to help
- Contacted my Local Authority

- Took another action (please specify) _____
- None of these (*single code*)

CLASSIFICATION QUESTIONS:

Q16. Could you tell me when your business\organisation started?

- 01: Less than a year ago
- 02: 1 to 2 years ago
- 03: 2.1 to 3 years ago
- 04: 3.1 to 4 years ago
- 05: 4.1 to 5 years ago
- 06: 5.1 to 7 years ago
- 07: 7.1 to 10 years ago
- 08: 10.1 to 15 years ago
- 09: 15.1 to 20 years ago
- 10: 20.1 to 25 years ago
- 11: 25.1 to 30 years ago
- 12: 30.1 to 40 years ago
- 13: More than 40 years ago

Q17. What was the approximate value of turnover (or total sales revenue) in your last financial year? Please answer in relation to this location only.

READ OUT AS NECESSARY

- 01: Under £100k
- 02: £100k to £200k
- 03: £201k to £300k
- 04: £301k to £500k
- 05: £501k to £750k
- 06: £751k to £1 million
- 07: £1.1 million to £5 million
- 08: £5.1 million to £10 million
- 09: £10.1 million to £50 million
- 10: £50.1 million to £100 million
- 11: Over £100 million

Q18. Is your business or company a wholly owned subsidiary, or operating unit, of a larger company?

- 01: Yes, wholly owned subsidiary\operating unit
- 02: No, neither

Q19. Is your company largely UK owned or part of an international group with headquarters outside the UK?

- 01: UK owned
- 02: International group
- 03: Other (please specify) *OPEN

Q20. And in which local authority is your business based?

- 01: Anglesey \ Môn
- 02: Blaenau Gwent
- 03: Bridgend
- 04: Caerphilly
- 05: Cardiff
- 06: Carmarthenshire
- 07: Ceredigion
- 08: Conwy
- 09: Denbighshire
- 10: Flintshire
- 11: Gwynedd
- 12: Merthyr Tydfil
- 13: Monmouthshire
- 14: Neath Port Talbot
- 15: Newport
- 16: Pembrokeshire
- 17: Powys
- 18: Rhondda Cynon Taf
- 19: Swansea
- 20: Torfaen
- 21: Vale of Glamorgan
- 22: Wrexham

READ OUT:

Thank you for your time.

Just to confirm that my name is XXXXXXXXXXXX calling from Beaufort Research and that this survey has been conducted according to the Market Research Society Code of Conduct.

If you'd like to check our credentials, you can telephone the MRS via the freephone number 0800 975 9596. I can also provide you will a copy of Beaufort's Privacy Policy if you wish.

Thanks again and goodbye.