

**RESEARCH REPORT**

# Welsh Businesses' Views on sWEEE Recycling 2025

Prepared for:  
Welsh Government



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# 1. Introduction and objectives

In April 2024 the Welsh Government introduced legislation that requires all workplaces in Wales to separate their recyclable materials in a similar way to most households.

From April 2026, all workplaces will also be required to separate small waste electricals for recycling. Small waste electricals are any item that has a plug, battery or cable, and is no longer than 50cm on any side, for example a kettle or mobile phone. The laws are aimed at increasing the quantity and quality of waste that gets recycled in Wales.

Beaufort explored business awareness and attitudes to the legislative change, both prior to its implementation in April 2023 and shortly after its introduction in April 2024. Beaufort was again commissioned in 2025 to establish baseline measures of awareness and attitudes towards the additional requirement to separate small waste electricals for recycling from April 2026. Recall of the advertising campaign was also measured in the survey.

## 2. Methodology

A telephone survey was conducted with a sample of 504 small and medium-sized businesses (SMEs) across Wales. The surveys questions were asked as part of the Beaufort Wales Business Omnibus<sup>1</sup>. The survey methodology and sampling approach, including quotas and weighting, replicated that of previous surveys exploring business awareness and attitudes to the original 2024 legislative change.

The Wales Business Omnibus Survey uses proportional Market Location quota sampling (not random sampling) to reflect SME business population in Wales. Therefore, any findings in this survey reflect the view of the sample and care should be taken in translating any findings to the wider SME business population in Wales.

Further, any changes in responses between survey waves should also be treated with care. The changes reflect the difference in awareness and attitudes between the two samples rather than any definitive changes in the SME business population in Wales.

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<sup>1</sup> [Business Omnibus - BeaufortResearch](#)

The survey sample was designed to reflect the characteristics of SME business establishments located in Wales in terms of business activity types, business size (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

<b>Business Activities included</b>	<b>SIC Category</b>
<i>Agriculture, Fishing, Mining &amp; Utilities</i>	A, B, D, E
<i>Manufacturing</i>	C
<i>Construction, Transport/communications</i>	F, H, J (61 only)
<i>Wholesale &amp; 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, maintaining consistency with the previous surveys.

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.

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 Location<sup>2</sup>, 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

<sup>2</sup> [Market Location](#)

featured both closed and open-ended (free text) questions. Some questions were repeated from previous survey waves to enable comparison over time, while others were included specifically for this baseline survey. 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 this baseline survey a total of 504 survey responses were collected between 29 September and 14 November 2025.

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

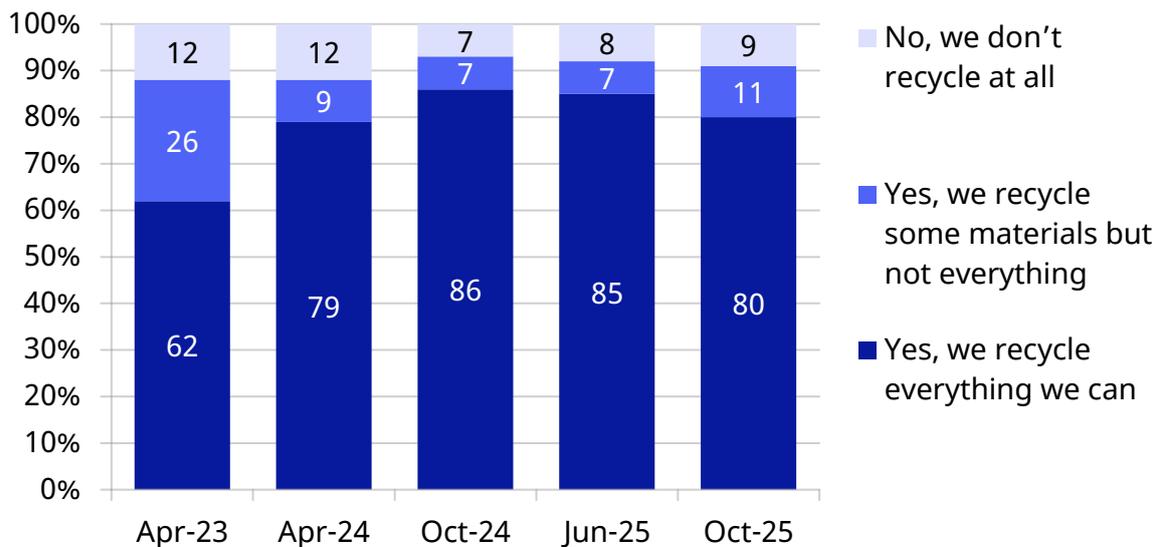
# 3. Research Findings

## 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 October 2025, 8 in 10 Welsh SMEs surveyed (80%) said they recycled everything they can (see figure 1) - slightly fewer than reported doing so in June 2025 (86%), but an increase from around 6 in 10 (62%) since April 2023. Slightly fewer than one in ten of those surveyed in October 2025 (9%), 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, October 2024 = 500, June 2025 = 503, October 2025 = 504).

In October 2025, smaller organisations, based on number of employees, were less likely to recycle everything possible, with 74% of those surveyed with just 1 employee doing so, compared to 89% of those with two or more employees.

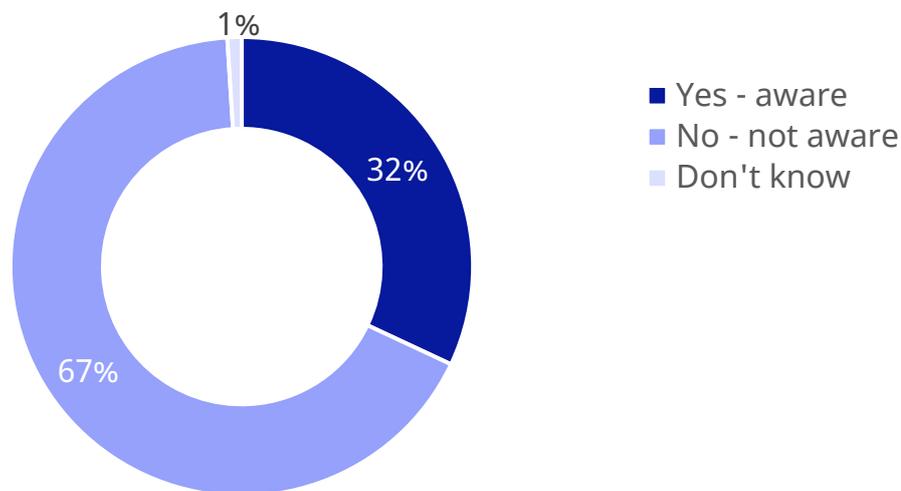
Respondents who were least likely to recycle everything possible in October 2025 were those in construction, transport/communications (68% doing so) and agriculture, fishing, mining & utilities (74%), while SMEs surveyed in the hotels and other services sector (90%), manufacturing businesses (81%), and wholesale & retail businesses (80%) were most likely to do so.

## 3.2 Awareness and knowledge of changes to the law

Unprompted awareness of changes to workplace recycling legislation in Wales among surveyed Welsh SMEs increased substantially from 13% in April 2023 (before the legislation was introduced) to 85% in April 2024 and 84% in October 2024. By June 2025, awareness of changes to the law in the last few years had declined to 69%, before increasing again to almost 8 in 10 (79%) in the most recent survey in October 2025.

In October 2025, respondents were prompted with an explanation of the law change, and the additional requirement to separate small waste electricals for recycling from April 2026.<sup>3</sup> Following prompting with this explanation, 3 in 10 (32%) SMEs surveyed in Wales had heard about the additional requirement to separate small waste electricals for recycling.

**Figure 2:** Awareness of additional requirement to separate small waste electricals for recycling from April 2026. (October 2025, %)



Base: all respondents (October 2025 = 504).

Smaller organisations surveyed (by turnover) were the least likely to be aware of the additional requirement to separate small waste electricals for recycling

<sup>3</sup> Explanation provided: "In April 2024 the Welsh Government introduced legislation that requires all businesses in Wales to separate their recyclable materials in a similar way that most householders do. From April 2026, all workplaces will also be required to separate small waste electricals for recycling. A small electrical or electronic item is any item that has a plug, battery or cable, and is no longer than 50cm on any side, for example a kettle or mobile phone.."

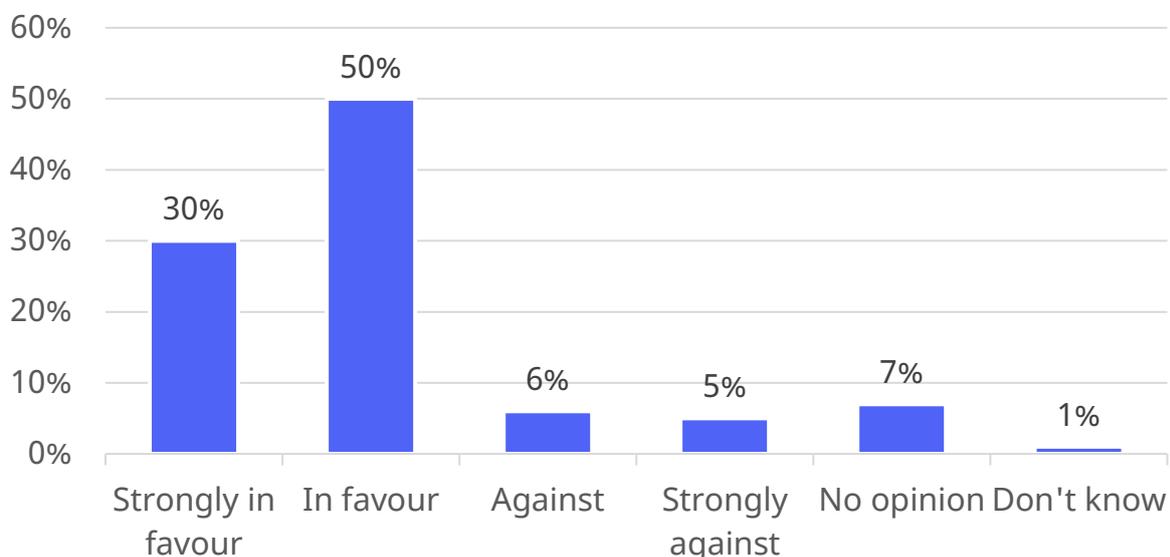
from April 2026. Among businesses surveyed with a turnover of less than £500k, 31% had heard of the additional requirement, compared to 38% of those surveyed with a turnover exceeding £500k.

Reflecting their recycling practices, those in the hotels and other services sector (39%), and manufacturing businesses (37%), were the most likely to be aware of the additional requirement to separate small waste electricals for recycling. SMEs surveyed in the finance and business services sector (22%) and wholesale and retail businesses (30%) were least likely to be aware.

### 3.3 Views on the law change

In October 2025, 8 in 10 (80%) of SMEs surveyed said they were in favour of the requirement to separate small waste electricals for recycling - 30% were 'strongly in favour', while a greater proportion (50%) were 'in favour'. Slightly more than 1 in 10 (11%) were against.

**Figure 3:** Extent to which SMEs were in favour of the requirement to separate small waste electricals for recycling (%)



Base: all respondents (October 2025 = 504).

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 57% of the 401 SMEs in favour of the new law) and environmental benefits (22%). A list of the main reasons given is shown in figure 4 overleaf.

**Figure 4: Main reasons for being in favour of the new law (unprompted)**

	% <sup>4</sup>
General Support for Recycling (e.g. recycling is good, makes sense etc.)	57
Environmental Benefits (e.g. protecting the environment, sustainability, reducing carbon footprint)	22
Landfill Reduction (e.g. avoiding landfill, reducing waste, preventing fly-tipping)	8
Social Responsibility (e.g. duty, everyone should, responsibility)	7
Resource Recovery (e.g. reusing materials, conserving resources, recovering metals)	4
Corporate Ethos (e.g. a green company, Fits our ethos, B-Corp accredited)	2
Safety Concerns (e.g. fire risk, dangerous in wrong hands)	1
Base: those in favour of the new law – October 2025 (401)	

Conversely, when asked why they were opposed to the new law, the main unprompted concerns mentioned related to cost burden (27%), time & effort required, and scepticism about recycling effectiveness (20%). Other main reasons given are shown in figure 5 below:

**Figure 5: Main reasons for opposing the new law (unprompted)**

	% <sup>5</sup>
Cost Burden (e.g. added costs for bins, collection, compliance, or business operations)	27
Time & Effort (e.g. extra work, hassle, paperwork, or inconvenience)	22
Scepticism About Recycling Effectiveness (e.g. doubts recycling is done properly or is pointless/tick box exercise)	20
Principle / Resistance to Mandates (e.g. mentions dislike of being forced or government interference)	12
Burden on Small Businesses (e.g. too much pressure on small businesses, another burden on businesses)	9
Already Doing Enough (e.g. recycle enough, a company is already paid to do it)	8
Risk of Fly-Tipping (e.g. rules will lead to illegal dumping)	5
Lack of Incentive / No Benefit to Business	4
Logistical Challenges (e.g. difficulty due to location, transport restrictions, lack of facilities)	3
Base: those opposed to the new law – October 2025 (59)	

<sup>4</sup> Responses could be assigned to multiple reason categories<sup>20</sup>

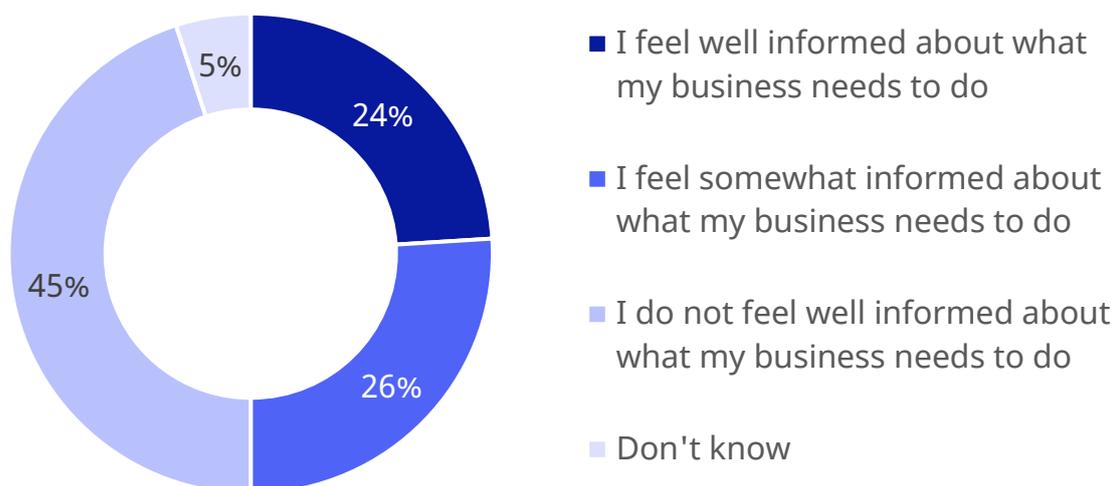
<sup>5</sup> Responses could be assigned to multiple reason categories<sup>12</sup>

### 3.4 Levels of how informed and prepared SMEs were

The survey also examined how informed SMEs felt about the actions they needed to take to prepare for the requirement to separate small waste electricals for recycling that will start in April 2026.

In October 2025, half (50%) of SMEs surveyed reported feeling either 'well informed' (24%), or 'somewhat informed' (26%) about the actions required to prepare. 45% did not feel well informed.

**Figure 6:** How well informed do you feel about the actions your business needs to take to prepare for the requirement to separate small waste electricals for recycling that will start in April 2026? (%)

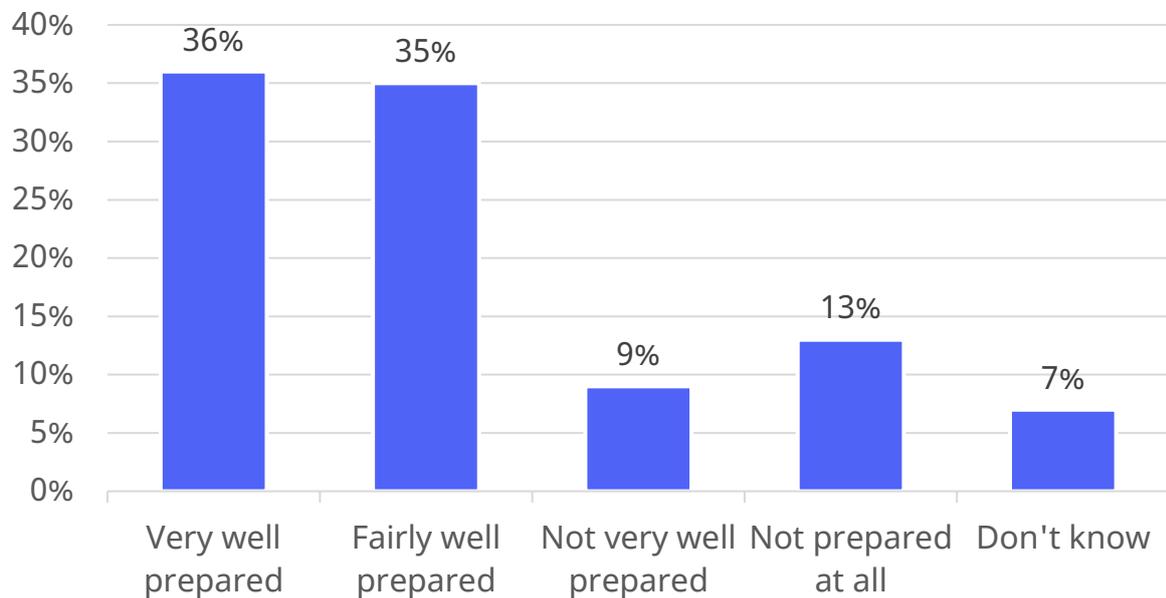


Base: all respondents (October 2025 = 504).

By sector, SMEs surveyed in the hotels and other services sector were the most likely to have felt well informed, with 30% reporting this, followed by those in the manufacturing sector (28%).

When asked about their preparedness for the requirement to separate small waste electricals for recycling from April 2026, 7 in 10 (71%) of SMEs surveyed reported feeling either 'very' or 'fairly' well prepared in October 2025. 36% felt 'very well' prepared, while 35% felt 'well prepared'. More than 1 in 10 (13%) indicated they were not prepared at all.

**Figure 7:** How well prepared is / was your business or organisation for the requirement to separate small waste electricals for recycling from April 2026? (%)



Base: all respondents (October 2025 = 504).

By sector, SMEs in the 'finance and business services' and 'agriculture, fishing, mining & utilities sector' were the most likely to have felt prepared, with 80% and 79% respectively of respondents from these sectors reporting this, compared to 62% of those in the wholesale and retail sector.

### 3.5 Communications awareness

The survey also measured awareness of advertising, communications or marketing about the new requirement to separate small waste electrical items and, if so, where they had seen this.

In October 2025, more than 1 in 10 (12%) of Welsh SMEs surveyed had seen or heard communications about the additional requirement recently.

Among those who had seen or heard communications, the main sources of awareness were:

- Direct email or text message (23%)
- TV news / programme (21%)
- Information from their waste carrier (16%)
- Social media (e.g. Facebook, Instagram, Twitter) (15%)

- Word of mouth (13%)
- Online news story (13%)
- Newspaper / magazine article (11%)

Base: all aware of the campaign (October 2025 = 58)

## 4. Appendix: October 2025 Research Questions

**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 in the last few years?**

Yes

No

Don't know

**Q3. In April 2024 the Welsh Government introduced legislation that requires all businesses in Wales to separate their recyclable materials in a similar way that most householders do.**

**From April 2026, all workplaces will also be required to separate small waste electricals for recycling. A small electrical or electronic item is any item that has a plug, battery or cable, and is no longer than 50cm on any side, for example a kettle or mobile phone.**

**Before today, were you aware of this additional requirement?**

Yes

No

Don't know

**Q4. What's your view on this requirement to separate small waste electricals for recycling – are you...?**

- Strongly in favour
- In favour
- Against
- Strongly against
- No opinion
- Don't know

**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 do you feel about the actions your business needs to take to prepare for the requirement to separate small waste electricals for recycling that will start in April 2026? *Read out – scale to be inverted between interviews***

- I feel well informed about what my business needs to do to
- I feel somewhat informed about what my business needs to do
- I do not feel well informed about what my business needs to do
- Don't know

**ASK ALL**

**Q7. How well prepared is your business or organisation for the requirement to separate small waste electricals for recycling from April 2026? *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

**Q8. Have you seen or heard any advertising, communications or marketing about this additional requirement to recycle small electrical items recently?**

Yes

No

**ASK IF AWARE OF ADVERTISING/COMMS/MARKETING AT Q8**

**Q9. Where did you see or hear this advertising, communications or marketing? READ OUT - CODE ALL THAT APPLY**

Direct email or text message

Information from my waste carrier

Newspaper / magazine advert

Newspaper / magazine article

Online advert

Online news story

Outdoor digital billboards and screens

Posters

Social media (e.g. Facebook, Instagram, Twitter)

TV news / programme

Word of mouth

Other (please specify) \_\_\_\_\_

Don't know