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The Sale and Use of Carrier Bags in Wales

Executive summary

1. Background and objectives

- 1.1 The Single Use Carrier Bags Charge (SUCB) (Wales) Regulations 2010,¹ require all persons who sell goods in Wales or for delivery to persons in Wales (sellers) to charge a minimum of 5p for each SUCB issued. The charge is levied at the point of sale and applies both in store and via distance selling methods.
- 1.2 A Post-implementation Review² (PIR) was published in 2016 as an early assessment of the impact of the SUCB charge. The review examined: trends in demand for SUCBs and for various types of other shopping bags (e.g. Bags for Life (BfL), paper carrier bags, jute bags, cotton bags, etc.) from 2011-15; the projected environmental and economic costs and benefits; and the attitudes and behaviours of retailers and consumers in response to the 5p charge on SUCBs.
- 1.3 The PIR results indicated a 71% reduction in the number of SUCBs supplied in Wales between 2011 and 2014, along with encouraging positive impacts on consumers including increased own bag use, and widespread support for the charge to continue.
- 1.4 The Sale and Use of Carrier Bags in Wales ('the 2019 Study') aims to provide the Welsh Government with up-to-date data on bag usage in Wales, and an understanding of current retailer and consumer attitudes and behaviour in response to the SUCB charge.
- 1.5 The findings will be used to help with the monitoring of current policy, and to identify whether further government action is needed on carrier bags.

Methodology

- 1.6 The research was divided into two workstreams:
 - (1) **Quantitative research with retailers and takeaways**, to determine how many bags have been issued since the 2016 PIR, and understand current attitudes and behaviour relating to carrier bags.

¹ For full details, please refer to [The Single Use Carrier Bags Charge \(Wales\) Regulations 2010](#).

² For further information, please refer to [the Post-implementation Review of the Single Use Carrier Bag Charge in Wales](#) (2016), published on the Welsh Government's website.

- (2) **Qualitative research with consumers**, to understand citizen attitudes and behaviour with regard to carrier bags.

Quantitative research

- 1.7 The quantitative research consisted of a survey of retailers, targeting small and large businesses separately in Wales. Fieldwork was conducted in early 2019 providing figures for calendar year 2018, as well as for the financial years 2015-16, 2016-17, 2017-18, (1st April to 31st March).
- 1.8 A total of 890 SME retailers (defined as having fewer than 250 employees) were interviewed in the SME survey. Of these, 440 (49%) reported not issuing bags at all whereas 450 SMEs reported issuing at least one type of carrier bag during the period of interest so were asked the full questionnaire.
- 1.9 Securing interviews with large businesses (defined as having 250 or more employees) was challenging without pre-existing contact information, and considerably more resource intensive per business in comparison to SMEs. Securing interviews with as many of the largest ten supermarkets in Wales as possible was given priority, in the knowledge they would be responsible for a considerable majority of the carrier bags issued in Wales.
- 1.10 In total, 11 large businesses responded to the survey, including four of the top ten supermarkets. Desk research gathered data on plastic SUCBs for a further two of the top ten supermarkets.
- 1.11 The data collected were sufficient to allow for robust estimation of the number of plastic SUCBs issued in Wales. The limited and partial responses received from large businesses preclude robust estimation for other bag types; however, the available evidence has been used to provide, in addition, purely indicative estimates for plastic BfL and very lightweight plastic bags.

Qualitative research

- 1.12 The qualitative research with consumers was conducted via an online discussion board, consisting of multiple tasks undertaken across a period of seven days. This method was chosen based on the expectation that consumers would have a highly individual and nuanced approach to their use of shopping bags.
- 1.13 A total of 34 consumers successfully completed all the tasks. The online discussion board was conducted from 22-29 October 2018.

2. Key findings

Plastic SUCBs

- 2.1 Between 2015-16 and 2017-18 there was an estimated 21% decrease in the number of SUCBs issued by retailers in Wales; we estimate 94.1 million were issued in 2017-18, compared with 119.4 million in 2015-16.
- 2.2 Large supermarkets ceasing to issue plastic SUCBs in the period of interest was the predominant reason for the decline. In 2015 Sainsburys became the first large supermarket to replace plastic SUCBs instore, followed by Tesco in 2017, and others following suit in 2018, however many home deliveries still used plastic SUCBs. In the period 2019-20 it is anticipated that use of SUCBs for home deliveries would also decline, with Asda and Tesco having already announced in July 2019 they are no longer using SUCBs for home deliveries. If the trend prior to 2017-18 had continued, without supermarkets and other large businesses changing their policies, the number of SUCBs issued in the period would, in all likelihood have increased.

- 2.3 SMEs accounted for 11% of all plastic SUCBs issued in Wales in 2017-18. We estimate that the number of plastic SUCBs issued by SMEs in 2017-18 (10.2 million bags) was broadly the same as the number issued in 2015-16 (9.9 million). This difference is not statistically significant and is due to increases in both the number of SMEs in Wales and the number of plastic SUCBs issued per SME. This is despite SMEs overall being positive about the charge, and 15.4% reporting they were considering phasing out SUCBs.

Use of reusable bags

- 2.4 We estimate that 65.2 million plastic BfL were issued by the largest ten supermarkets in Wales in 2017-18. Whilst the available evidence should be considered indicative rather than robust, it is clear the number of plastic BfL issued in Wales has continued to increase since 2015. The estimate and figures from the 2019 study cannot be directly compared with the PIR estimates for 2015 due to the fact data for Aldi, Iceland and Lidl were not collected at the time of the PIR. This makes an analysis of change over time in BfL problematic. However, estimates based on only the seven largest supermarkets reporting to WRAP at the time of the PIR (as opposed to the current largest ten supermarkets) indicate that, at a minimum, the number of BfL issued per annum was at least 40% higher in 2017-18 than in 2015. Recent evidence published by the EIA suggests this upward trend has continued between the calendar years 2018 and 2019.³
- 2.5 Qualitative research evidence suggests consumers are in a routine of using reusable bags now, at least when doing large supermarket shops. The same is true when it comes to smaller top up shops, albeit to a lesser extent. Consumers did report that when doing other types of shopping, such as clothes shopping, using reusable bags was less likely.
- 2.6 There has been a rise in the number of reusable plastic bags issued by SMEs during the period 2015-18. This is driven by an increase in the number of retailers issuing such bags, which are sometimes referred to as BfL, but are not replaced for free when they are worn-out.
- 2.7 We estimate, given the significant changes noted above in the SUCB policies of some of the largest supermarkets in 2018, the likely continued downward trend in SUCB use for other large businesses in Wales and the continued upward trend suggested by EIA in the number of plastic BfL being issued, that 2018-19 was the year plastic BfL overtook plastic SUCBs as the most commonly issued bag type in Wales.

Very lightweight plastic bags

- 2.8 To support the Welsh Government in meeting EU reporting requirements, the Study aimed to provide an estimate of the number of very lightweight plastic bags issued in Wales. We estimate the largest ten supermarkets, in 2017-18, issued approximately 53.8 million very lightweight plastic bags, with SMEs issuing a further 1.1 million.

Attitudes towards the current SUCB charge

- 2.9 A total of 68% of retailers agreed the SUCB charge should continue, and, overall, retailer attitudes were still positive regarding the charge, with only 7% disagreeing it should continue.
- 2.10 Most consumers participating in the research were positive about the SUCB charge. There was a good understanding among consumers of the core purpose of the SUCB charge, and of the intended environmental benefits. There was clear understanding of the distinction

³ According to the latest EIA study, [Checking Out on Plastics 2](#), the eight largest supermarkets providing data in 2018 reported that they had issued 960 million plastic BfL in the UK; in 2019, the same eight companies reported issuing 1.24 billion, with an additional 271 million sold by two further supermarkets.

between single-use and reusable bags. Relatively few consumers understood they were entitled to a free replacement BfL.

- 2.11 Concerns about the SUCB charge, where present with consumers, tended to be about whether the charge was high enough as a disincentive to purchase new bags.
- 2.12 Some consumers were unclear how the funds raised from the SUCB charge was spent, reporting they would like to know more about this. This is consistent with PIR findings. The clear preference of consumers, when asked, was that money should be spent on local charities based in Wales, with a majority indicating it should be specifically for environmental projects.

Views regarding the future of the SUCB charge

- 2.13 Consumers interviewed in the qualitative work supported an increase in the SUCB charge. Around half supported increasing the charge to 20p or 25p, and slightly under half supported an increase to 10p. Only three of the 34 respondents did not support an increase in the plastic SUCB charge; one wanted removal of the charge (but also thought the charge was a tax going to Welsh Government), two wanted it to remain at 5p.
- 2.14 An estimated 51% of SME retailers agreed the SUCB charge should increase to continue incentivising using BfL; 37% disagreed or strongly disagreed.
- 2.15 Many consumers thought the SUCB charge already applied to BfL, and so were supportive of extending it to cover BfL. A number of qualitative research participants were surprised the SUCB charge did not apply to BfL, and that, in turn, there was no mandatory requirement for BfL money to go to charity.
- 2.16 An estimated 68% of SMEs thought the BfL proceeds should go to charity, but there was a 50/50 split in response to whether BfL should be brought under the same regulations as plastic SUCBs. This reluctance may be due to wider requirements such as recording and reporting of the numbers involved.
- 2.17 Consumers expressed little support for extending the SUCB charge to other single-use plastics such as plastic food packaging, with most believing the onus should be on the retailers to take action to reduce single-use packaging at source.
- 2.18 A total of 97% of SMEs reported they were charging for plastic SUCBs, but the retailer survey responses suggest there may be some non-compliance in regard to charging for paper SUCBs. The evidence also suggested, for SMEs with ten plus employees and supplying 1,000 plastic SUCBs or more per annum, some non-compliance in publishing the information on number of SUCBs issued.

3. Implications for the Welsh Government

- 3.1 Firstly, the evidence suggests the SUCB charge should be continued. There is widespread support for it, and it appears to have been effective in raising awareness of the environmental impact of SUCBs. The SUCB charge has led to a significant and sustained reduction in the number of SUCBs issued in Wales.
- 3.2 However, the numbers of plastic BfL being used in place of plastic SUCBs are concerning, and the Welsh Government should consider strategies to reduce the number issued and increase consumer re-use of plastic BfL where they are issued.
- 3.3 There appears to be support in general for the SUCB charge and requirements to be extended. Evidence from the Study suggests a majority of consumers and retailers would support increases to the charge, and action to require BfL charges go to charity.

- 3.4 It is recommended that a fuller consultation process is undertaken by the Welsh Government if it considers extending the SUCB charges to other single-use plastics. Consumers provided limited support for extension of charges to other single-use plastics, the feeling being that the onus should be on retailers to reduce at source.
- 3.5 The Welsh Government may want to consider developing specific strategies to encourage SMEs to move away from issuing plastic SUCBs. In the period 2015-18, SMEs have continued to issue similar numbers of plastic SUCBs, whereas large businesses have taken action to reduce the number of plastic SUCBs they issue.
- 3.6 The Welsh Government should consider if any action is required to raise awareness and understanding of existing requirements, given some SMEs were not in full compliance in 2017-18, and some consumers had a limited understanding of the charges' scope and wanted more information on where proceeds go.
- 3.7 The difficulties faced in this Study in obtaining data on the numbers of bags issued by the largest ten supermarkets indicates a need for the Welsh Government to consider introducing mandatory reporting requirements. Ideally, this would cover other bag types in addition, especially BfL, since many supermarkets no longer have any plastic SUCBs or are phasing them out. Annual data from the largest ten supermarkets would bring useful insights for policy decisions in future and would enable the net environmental impacts of policy and actions taken by retailers to be analysed and scrutinised fully.
- 3.8 In the absence of mandatory reporting requirements, we encourage the Welsh Government to liaise with large businesses to secure commitment to supporting future studies to ensure participation, given the Study dedicated significant time and resources trying to collect information from the ten largest supermarkets and other large businesses, not necessarily successfully.

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Available at: <https://gov.wales/research-sale-and-use-carrier-bags-wales>

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

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