



Consumer research

Consumer research: e-waste attitudes and behaviours

January 2021



Overview of the Research Programme



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Method & sample



Qualitative research

- 7 x individual depth interviews
- 3 x teen friendship pairs
- 4 x parent/ child pairs
- 4 x focus groups (6-9 participants in each, with 31 participants in total)

Spread of:

- Age/ life-stage
- Socio-economic grade
- Housing type
- Living in urban/ rural locations



Locations: London, Edinburgh, Bristol, Manchester

Carried out 10th-14th December 2018

Qual base: 52 participants



Quantitative research

- Online survey of 15-20 minutes
- 2,049 interviews across United Kingdom with adults aged 18+
- Carried out 14th – 21st February 2019
- National representative sample with quotas set by region, age within gender, working status and social grade
- Data were weighted to known populations of this audience



Setting the scene

General attitudes and behaviours

Key for following slides:



- Findings from the Quantitative research



- Findings from the Qualitative research



Most are pro-recycling and would like to recycle more



86%

agree that **recycling is worth taking the time and effort** to do properly.

64%

agree that they **would like to recycle more** of their household waste than they currently do.



QG1. To what extent do you agree or disagree with the following statements?
a. I would like to recycle more of my household waste than I currently do
b. Recycling is worth taking the time and effort to do properly
Base: All respondents (2,049)

Confusion may be one reason people do not recycle as much as they would like



39% agree **it is difficult to decide** what they can and cannot put in the recycling bins at their home

Higher amongst:

Aged 18-34
(45%)

Newer to the area
(less than a year)
(48%)

Those less satisfied
with **local recycling
service**
(61%)

Those less satisfied
with **council's
guidance** on recycling
(71%)



QG1. To what extent do you agree or disagree with the following statements?

c. It is difficult to decide what I can and cannot put in the recycling bins at my home

Base: All respondents (2,049); Aged 18-34 (582); Newer to the area (less than a year) (135); Those less satisfied with local recycling service (258); Those less satisfied with council's guidance on recycling (279)

Also some behavioural inertia, which can make changing habits a challenge



Q. We asked a number of people to describe themselves in terms of recycling. Which do you feel most closely describes you?

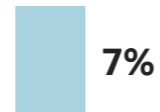
I want to be a really good recycler and I take the trouble to ensure I'm doing everything right



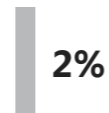
Recycling is a good thing but I don't spend too much time worrying about it - the same things go in every week and I feel like I'm doing my bit



Recycling is good in principle but for various reasons I don't really do it as much as I ought to



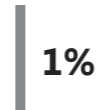
I'm not sure that recycling is that worthwhile to be honest. It's not going to make a difference whether I take the time or not



I disagree with recycling - I don't see the point

*

Don't know



Plastic & cardboard more top-of-mind when thinking about recycling. Less focus on electrical items



Top of mind associations

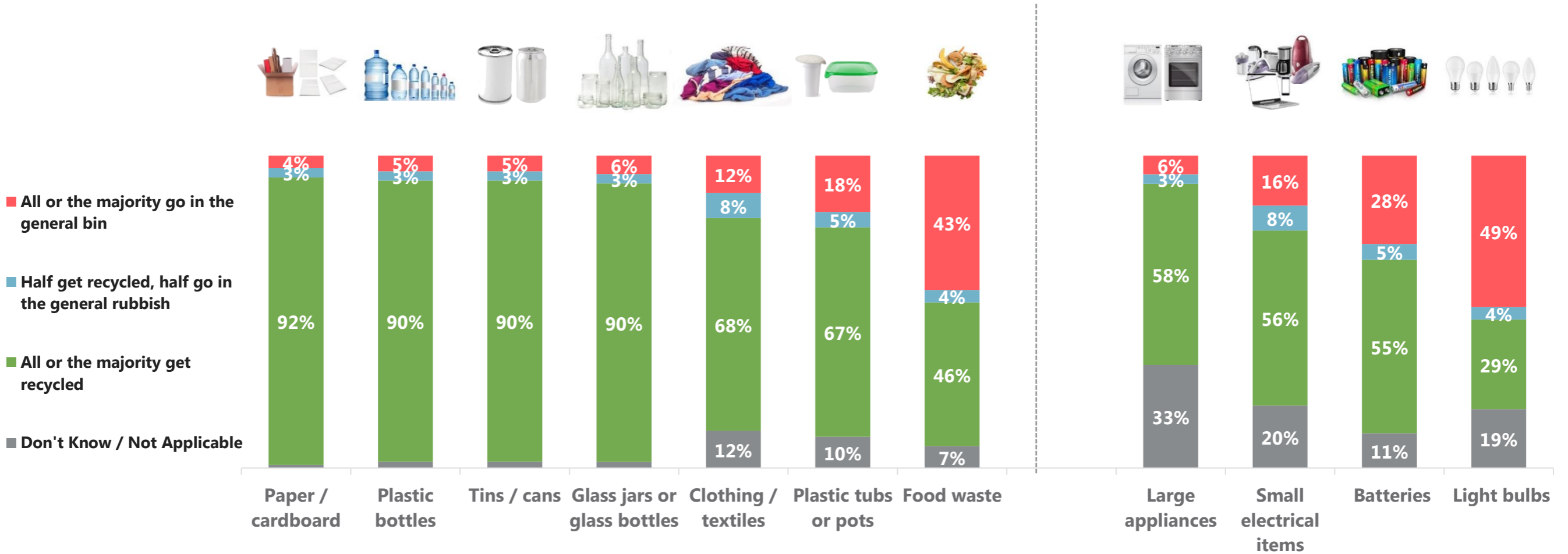


Qualitative base: 52 participants

Room for improvement for recycling of WEEE; particularly batteries and bulbs



Q. How does your household usually dispose of the following type of item?



QG4. How does your household usually dispose of the following type of item?
Base: All respondents (2,049)

Small Waste Electronic & Electrical Equipment (WEEE)

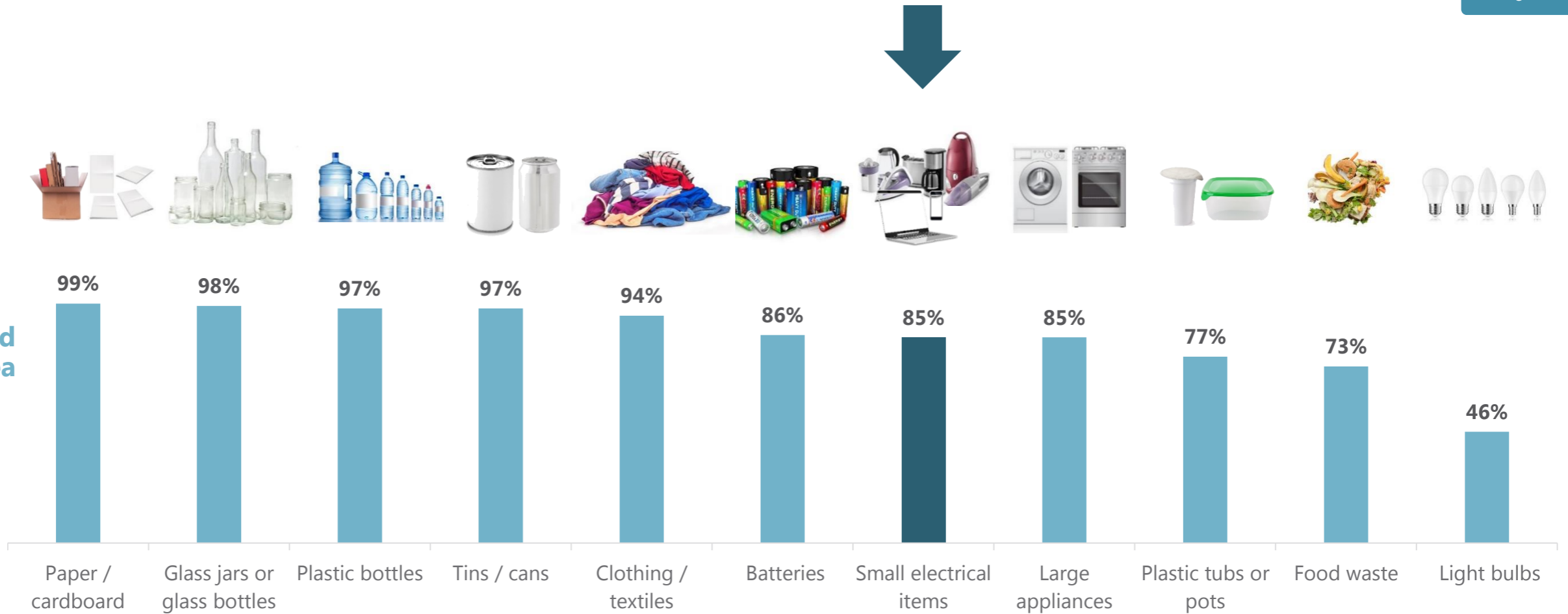
Usage, understanding and awareness of disposal options



Most think small electricals can be recycled via some means in their area



Can be recycled
in my local area



QG3. Below is a list of different types of item that people typically have at home and need to dispose of at times. To the best of your knowledge please answer if / how each type of item can be recycled in your local area.
Base: All respondents (2,049)

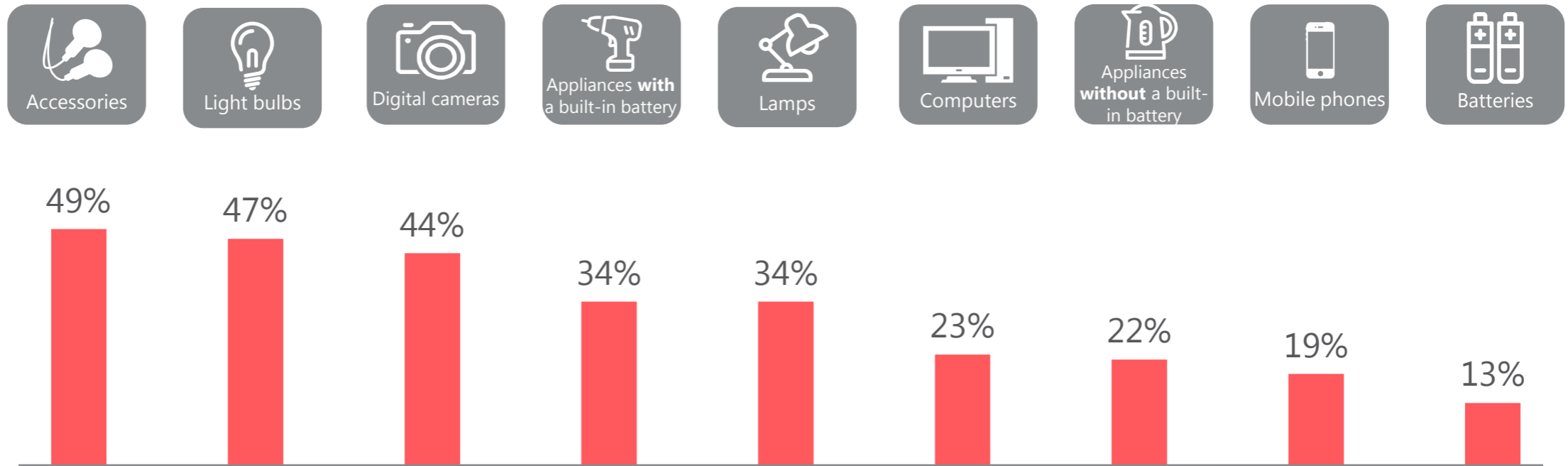
But less clarity when asked about *specific* types of WEEE

Please select if / how each item can be recycled in your local area



Quotes from qualitative research

"I am not sure if / how this type of item can be recycled"



"With electrics, I don't know what can and can't be recycled because of all the different parts." (25-39 years, C2DE)



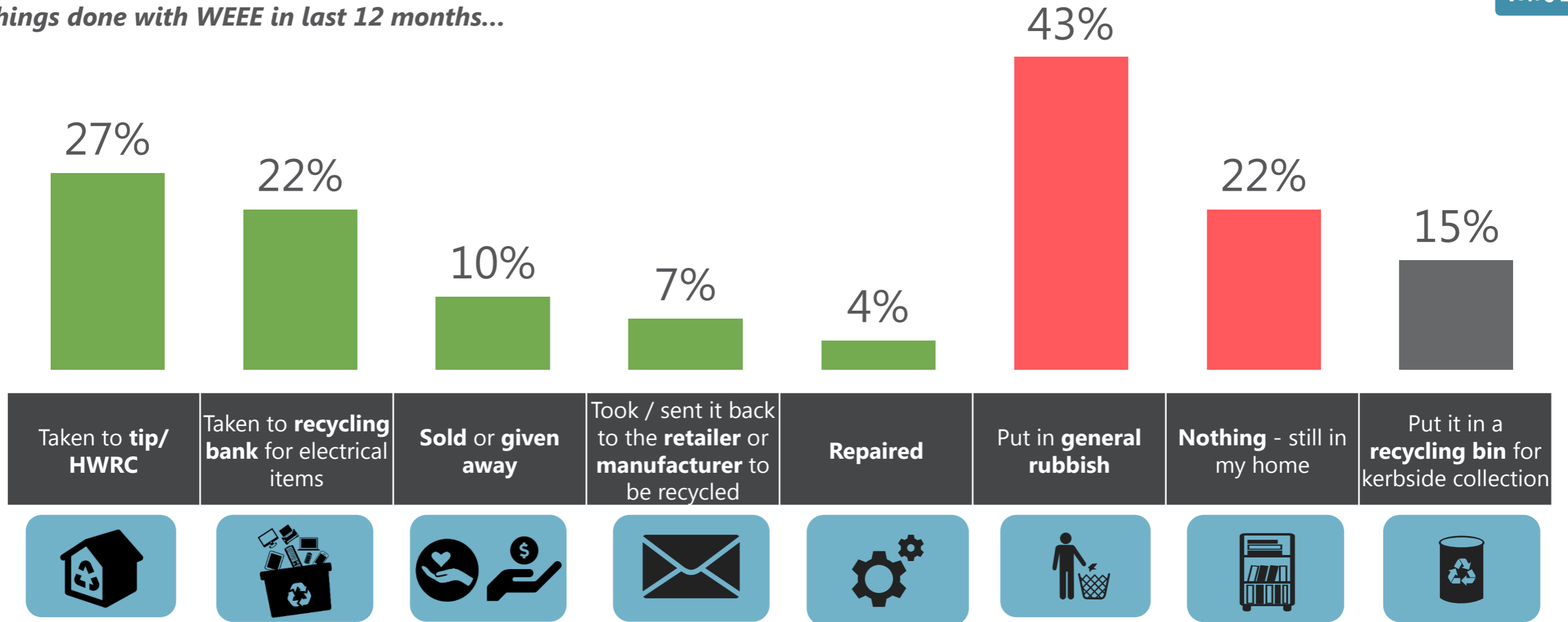
QE1. Below is a list of different types of small electrical items that people typically have at home and need to dispose of at times (for example because they are broken or no longer needed) Please select if / how each item can be recycled in your local area
Base: All respondents (2,049)

Qualitative base: 52 participants

Over 2 in 5 say they / someone in their household has thrown WEEE in the general rubbish in the past 12 months. Repair and re-use rates are low



Things done with WEEE in last 12 months...

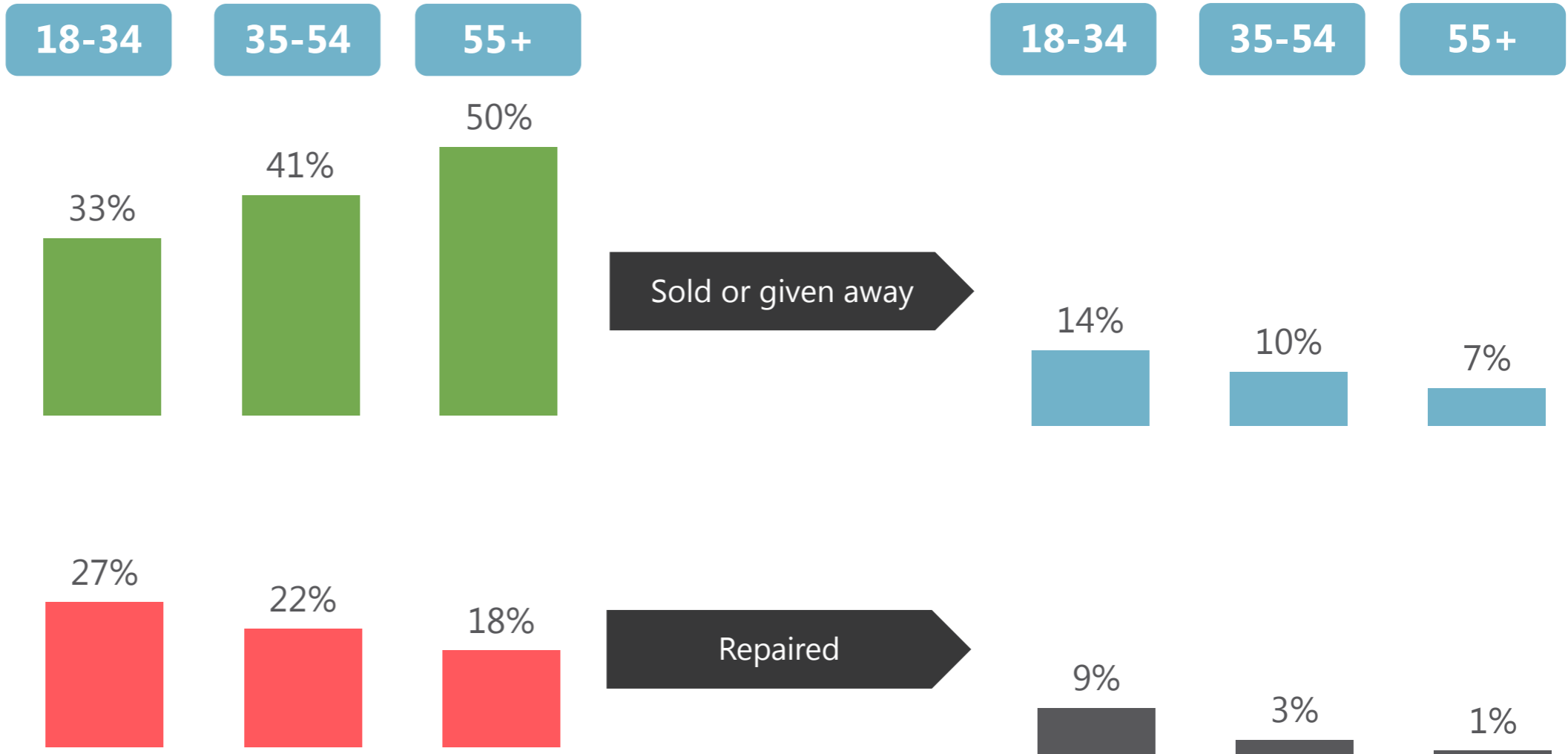


QE3. What did you or others in your household do with the broken or unusable small electrical items? If this has happened more than once in any category, please think about the last time it happened.
Base: All respondents (2049)

Link between behaviour and age; younger people more likely to hoard, sell/give away and repair WEEE, and less likely to recycle it



Things done with WEEE in last 12 months...



QE3. What did you or others in your household do with the broken or unusable small electrical items? If this has happened more than once in any category, please think about the last time it happened.

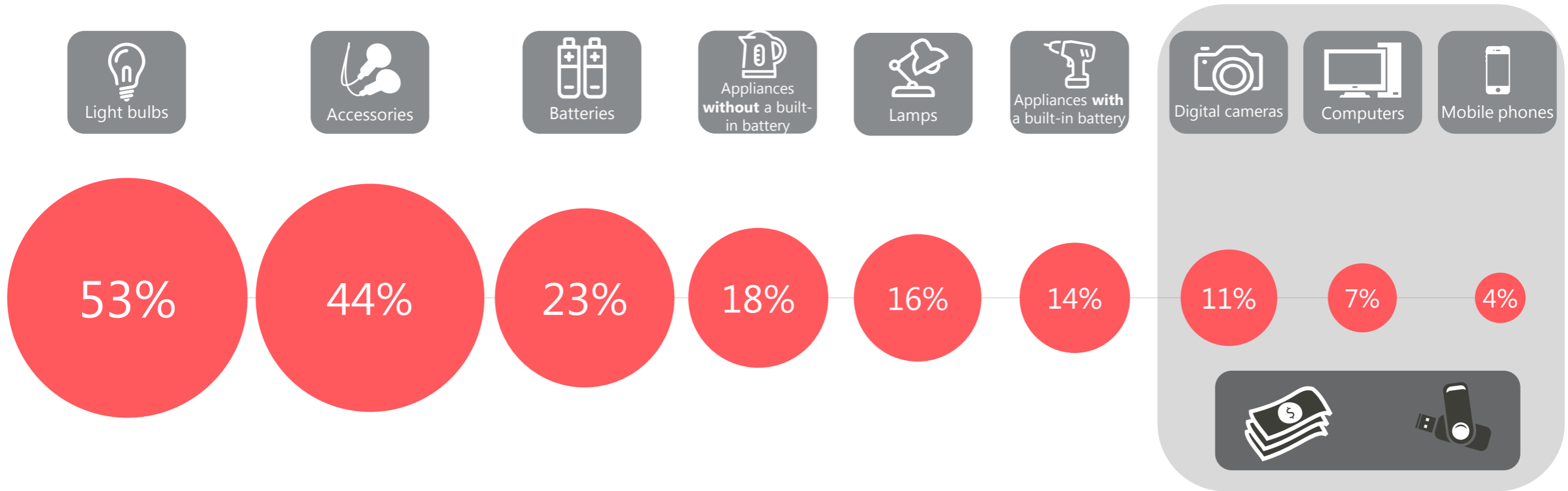
Base: All respondents: 18-34 (582), 35-54 (724), 55+(743)

Small, low-value WEEE most likely to be put in the general rubbish. High-value WEEE with data least likely to be binned



Action after item breaking/becoming unusable:

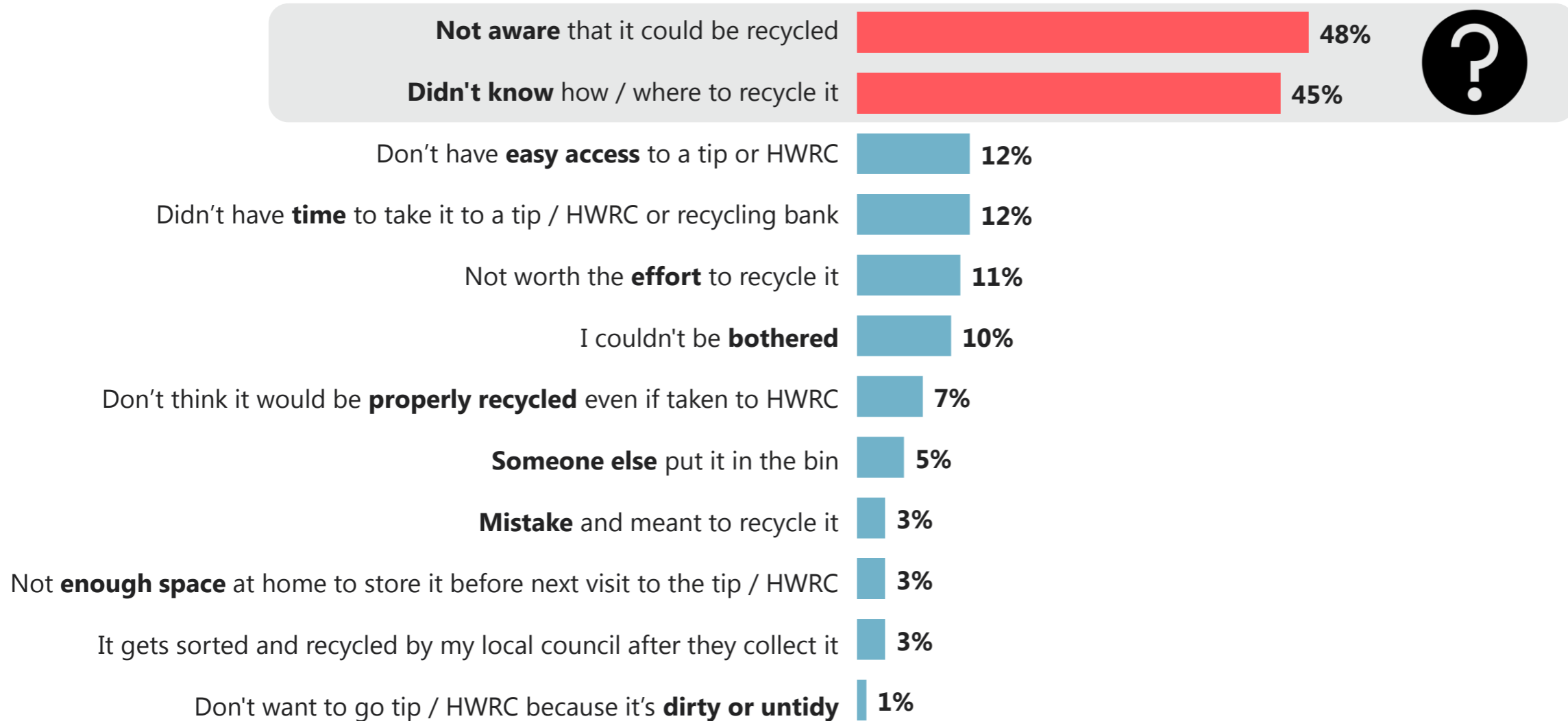
Put it in the general rubbish for kerbside collection



QE3. What did you or others in your household do with the broken or unusable small electrical items? If this has happened more than once in any category please think about the last time it happened
 Base: All who have had each type of item break/ become unusable in past 12 months: Computers (278); Mobile phones (428); Household appliances without a built-in battery (612), Household items that have a built-in battery (2560; Accessories (615); Digital cameras (59); Lamps (185); Batteries (1,556); Light bulbs (1,206).

Lack of awareness and understanding are the main reasons WEEE put in general rubbish

Reasons given for putting WEEE in the general rubbish (Among those who have put any WEEE item in general rubbish in last 12 months)



QE6. You said that you put the broken or unusable small electrical items listed below in the general rubbish bin. Here are some reason that people have given for not recycling small electrical items. Which if any, apply to you when thinking about why you / your household put broken or unusable small electrical items in the general rubbish bin in the past 12 months? Base: Those who have put any WEEE item in general rubbish in last 12 months (872)

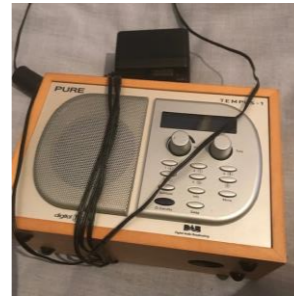


32%

say that they / someone in their household has **thrown** WEEE in the **general rubbish** due to **lack of awareness** about if or how it could be recycled

Hoarding

Photos from participant homes
Examples of items no longer used



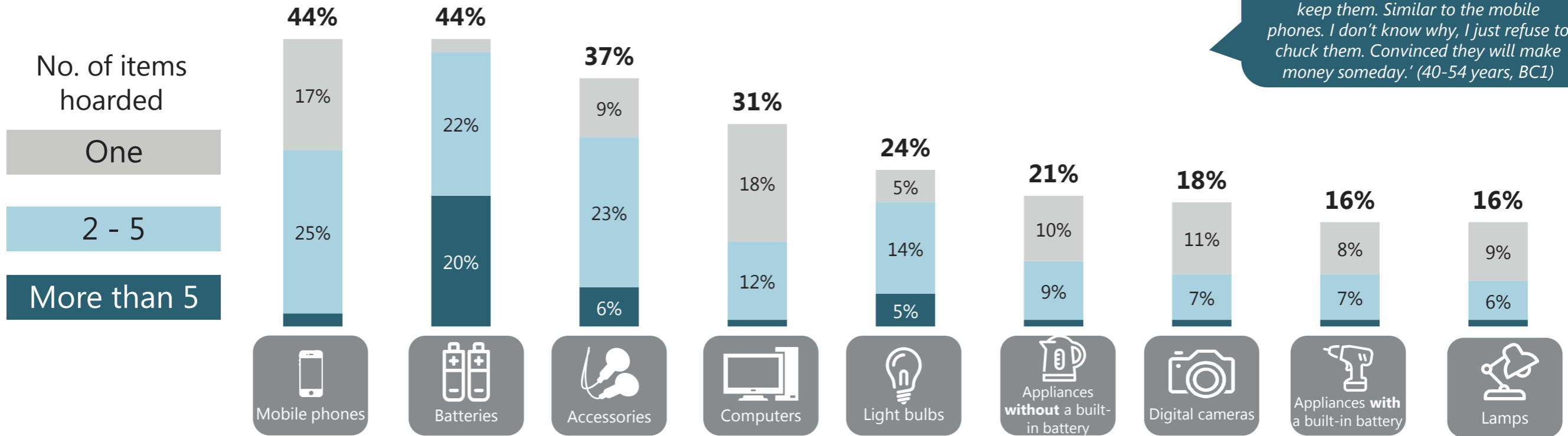
The most commonly hoarded items are mobile phones, batteries

and accessories and computers



Quotes from qualitative research

% who say that in their home they have broken or unused...



(on Games consoles)- 'I almost refuse to chuck them out. They are just sitting on top of the cupboard.' ... 'probably just keep them. Similar to the mobile phones. I don't know why, I just refuse to chuck them. Convinced they will make money someday.' (40-54 years, BC1)

18-24 year-olds are most likely to have hoarded each type of item; especially **accessories** (53%), **mobiles** (51%), and HH items **without battery** (29%)



QH1. How many, if any, of each of the following items are there currently in your home that are broken / unusable or no longer used? If you are not sure, please estimate how many you have. Base: Total Sample (2049)

Qualitative base: 52 participants

Reasons for hoarding vary by item, but lack of knowledge key for most.

Data security a top issue for computers and phones



Top three reasons given for not disposing of each item:



#1

Don't know how to ensure the **data / pictures are securely removed**

Don't know how to ensure the **data / pictures are securely removed**

Don't know how to correctly dispose of it

Don't know how to correctly dispose of it

Don't know how to correctly dispose of it

Plan on doing something with it but **haven't got around to it yet**

#2

Don't know how to correctly dispose of it

Plan on doing something with it but **haven't got around to it yet**

Plan on doing something with it but **haven't got around to it yet**

Don't know what else to do with it

Plan on doing something with it but **haven't got around to it yet**

Don't know how to correctly dispose of it

#3

Don't know what else to do with it

Want to keep it as a **spare**

Not able to get it to a tip / dump / HWRC or recycling bank

Plan on doing something with it but **haven't got around to it yet**

Don't know what else to do with it

Not able to get it to a tip / dump / HWRC or recycling bank



QE4. For what reason have you or others in your household not disposed of the broken or unusable items in you home? Base: Respondents who have at least one of each item in their home that is broken or unused: Computers (77), Mobile phones (175), HH appliances without battery (57), Accessories (121), Batteries (119), Lightbulbs (65). Only categories with a base of 50 or over shown

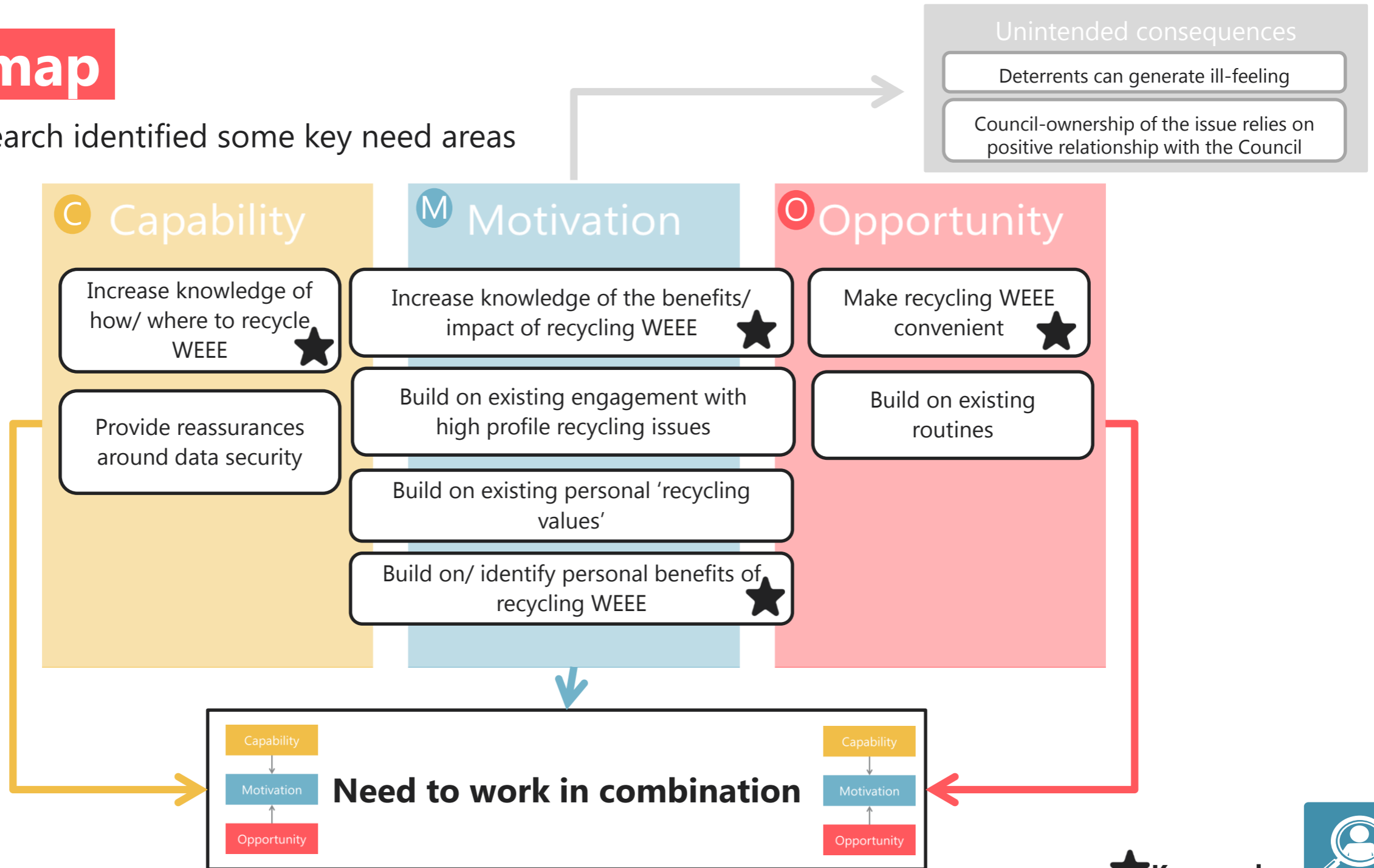
Small Waste Electronic & Electrical Equipment

What would motivate people to recycle?



Needs map

Qualitative research identified some key need areas



Mentions of communications/ information mainly relate to practical information on where, how and what to recycle

C CAPABILITY

What, if anything, would make you more likely to recycle small electrical items?

NET: COMMUNICATION/ INFORMATION	11%
Information / more info on how / where / what to recycle	9%
Education / awareness / knowledge	2%
Clear / clearer information	1%
Advertising / more advertising / publicity	1%

More information on **what can be recycled and how** the environment benefits

Bigger media coverage

Clearer **instructions** on **product** itself

Clearer idea of all the **options** for the different kinds of items. clearer understanding of how **data** is wiped from things like phones when recycling.

Clearer instructions as to what I can recycle and where locally I can do this - instructions vary so much by region that national advice feels useless

More **local recycling facilities**, I'm not aware of any in my area for electrical items and if there is they need to be better at advertising it.

Better information from the council on which **bin** to use as I currently have 5 different bins and I wouldn't know which one to put small electrical items in



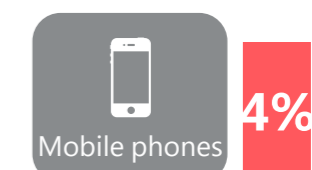
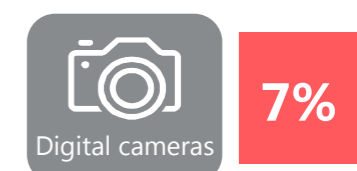
Although raising awareness alone may not be sufficient for all.

Some will still throw WEEE in general rubbish even if they know where to recycle it

Among those aware that each type of item can be recycled in their local area:

What are you or others in your household most likely to do with these broken or unused items?

Put in general rubbish



Incentives and information on environmental benefits spontaneously mentioned as potential motivators

What, if anything, would make you more likely to recycle small electrical items?

NET: REWARDS/
INCENTIVES/ CHARGES 7%

easier or small **deposit** like on plastic bottles in Germany

Cash back for recycling them

Getting **money back** from having paid a small deposit / surcharge at the purchase stage

A **deposit scheme**. Take the item for recycling, get a couple of quid back!

Charity **donations**

NET: ENVIRONMENTAL BENEFITS 3%

Knowing they did actually have an **impact**, I'm not convinced it doesn't end up in landfill.

To see what electrical items would do to the **environment**

Seeing advertising about the **damage it causes** if not recycled

Just more information to tell us how recycling is **helping the environment** and which items we can and can't recycle



QR7. What if anything, would make you more likely to recycle small electrical items?
Base: All Respondents (2,049)



Reducing landfill and stopping pollution / harm to natural

world most motivating reasons to recycle, although all resonate

Makes me a lot more likely to recycle small electricals

Makes me a little more likely to recycle small electricals

Recycling electricals reduces the amount of waste that goes into **landfill**



79%

Recycling electricals stops harmful substances they contain from **polluting** the **natural environment** and **harming wildlife**



78%

The world has a limited amount of some resources. Recycling electricals **conserves** the resources they contain such as metals



75%

Recycling electricals prevents the **carbon** and other **greenhouse gases** that they contain from being released into the atmosphere



74%

Recycling materials from electricals uses **less energy** than sourcing these materials from scratch (e.g. mining for the metals they contain)



71%

Recycled materials from electricals can be used by manufacturers in the UK **avoiding** the need to **import materials** from other countries



69%

If electricals are recycled the **cost** of recycling is paid for by the **companies that produced them** If they are put in the normal bin, the local authority has to pay for them to go to landfill



66%

If recycled the **data** on devices such as laptops and mobile phones is **securely destroyed**



65%



QR2. Do these reasons for recycling small electrical items make you more or less likely to recycle them the next time you need to, or do they make no difference?
Base: All Respondents (2,049)



Less than half aware of most of the key reasons for recycling WEEE.

Awareness of data security and 'producer pays' particularly low



% aware of each reason

Recycling electricals reduces the amount of waste that goes into **landfill**

63% aware

Recycling electricals stops harmful substances they contain from **polluting** the **natural environment** and **harming wildlife**

51% aware

The world has a limited amount of some resources. Recycling electricals **conserves** the resources they contain such as metals

48% aware

Recycling electricals prevents the **carbon** and other **greenhouse gases** that they contain from being released into the atmosphere

38% aware

Recycling materials from electricals uses **less energy** than sourcing these materials from scratch (e.g. mining for the metals they contain)

36% aware

Recycled materials from electricals can be used by manufacturers in the UK **avoiding** the need to **import materials** from other countries

32% aware

If recycled the **data** on devices such as laptops and mobile phones is **securely destroyed**

19% aware

If electricals are recycled the **cost** of recycling is paid for by the **companies that produced them** If they are put in the normal bin, the local authority has to pay for them to go to landfill

16% aware

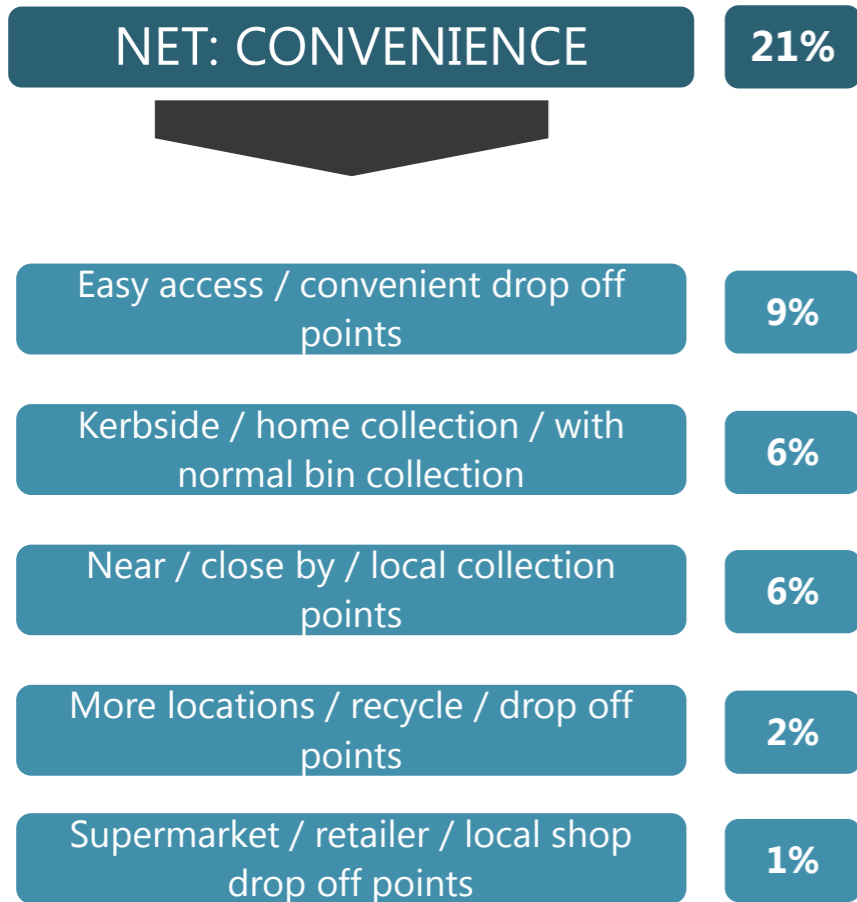


QR1. Many small electrical items can be recycled. There are a number of reasons to recycle small electrical items. Please indicate which of these reasons you were aware of before today.

Base: All Respondents (2,049)

Mentions of convenience mainly relate to easier access, drop-off points and collections

What, if anything, would make you more likely to recycle small electrical items?



*A **dedicated recycle point** that was close to home. i.e., in a shop or supermarket.*

*A **local** facility. At present I am not prepared to drive 15 miles each way to get to my council recycling centre.*

*Dedicated container for **kerbside collection***

*Easy access to a place to **hand them in**. I do not drive, so the option of "just go to the tip" is not open to me. It needs to be local and accessible. A mobile collection would be ideal (e.g., something that came around every month or two would be fine.)*

*If I could arrange for the item to be **returned** to the manufacturer by collection...or if I can return by post. I'd send a lot off to be recycled and get friends and family to do the same.*

OPPORTUNITY

Qualitative participant suggestions

- Free public transport to recycling centre
- Local collection points e.g. supermarket, school, gym, petrol station, community centre, library
- Return box/jiffy bag for free
- Monthly kerbside collection for street or household
- Annual community amnesty
- Return old item when buying new

"Having somewhere other than the tip... especially for small electrical stuff because if you're working you're not going to go on your Saturday morning to go and put a toothbrush or hairdryer to the tip" (25-39 years, C2DE)



QR7. What if anything, would make you more likely to recycle small electrical items?
Base: All Respondents (2,049)



Qualitative base: 52 participants

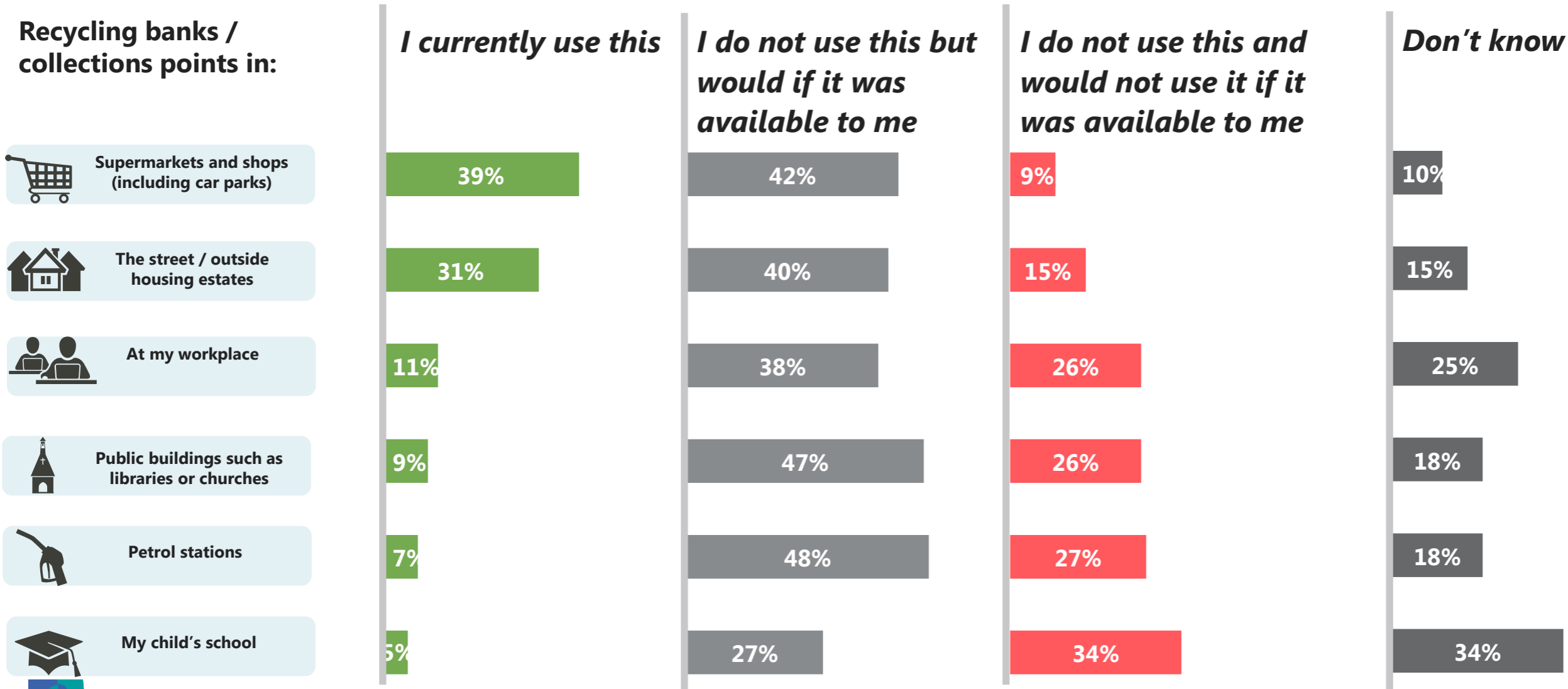
Good potential for WEEE recycling banks and collection

points in public places



If the ways and places to recycle electrical items listed below were all available to you, which do you think you would use?

Recycling banks / collections points in:



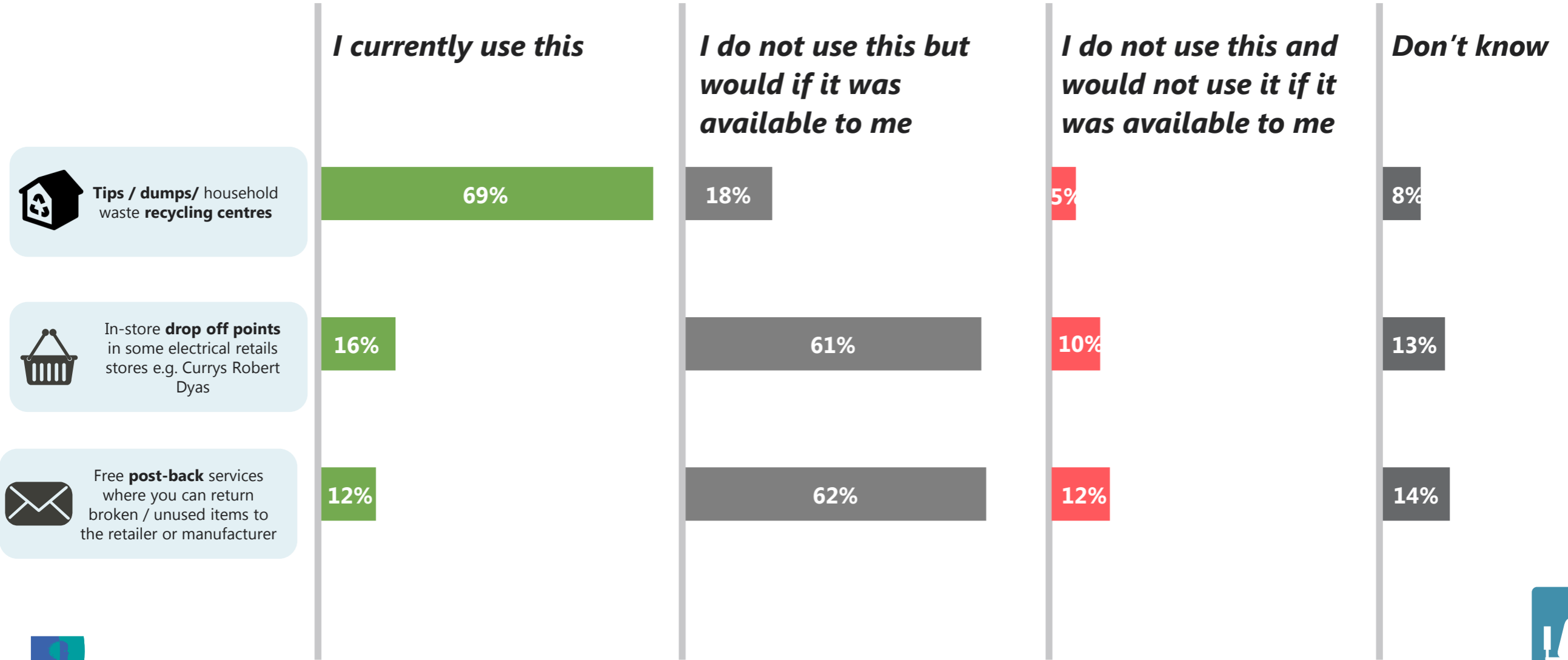
QR5. If the ways and places to recycle electrical items listed below were all available to you which do you think you would use?
Base: All Respondents (2,049)



Few use post-back services or in-store drop of points but most say they would if available to them



If the ways and places to recycle electrical items listed below were all available to you, which do you think you would use?



QR5. If the ways and places to recycle electrical items listed below were all available to you which do you think you would use?
Base: All Respondents (2,049)



Small Waste Electronic & Electrical Equipment

Communications

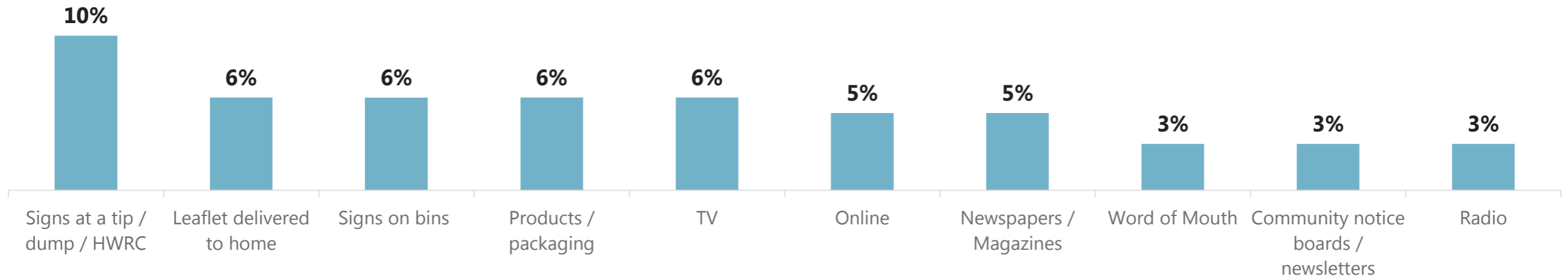




25%

Had **seen, heard** or **read** something about recycling small electrical items recently

Channels mentioned



QC1. Have you seen heard or read any advertising, publicity or information about recycling small electrical items in any of these places recently?
Base: All Respondents (2,049)



52% want to **know more** about how to recycle small electrical items

Higher amongst:

18-34 Year olds
(60%)

Females
(58%)

Greater London
(62%)

Those with communal bins
(60%)

Those without cars
(59%)



QC5. Which of the following statement best applies to you?

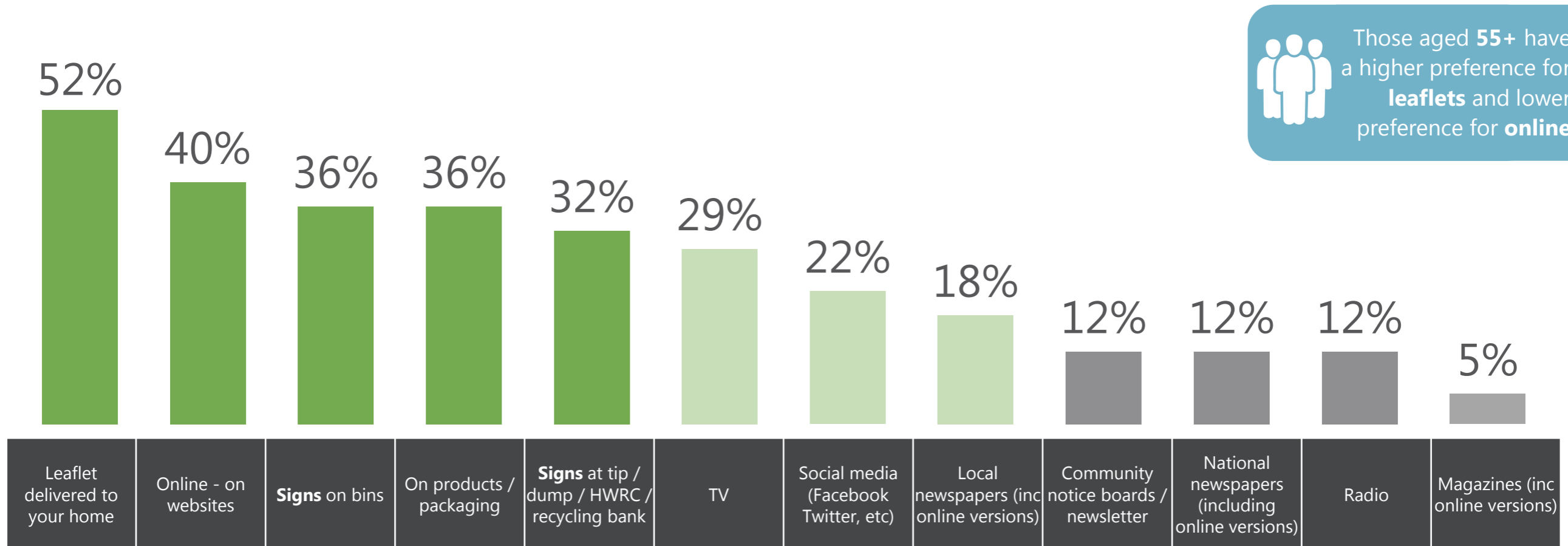
b. I want to know more about how to recycle small electrical items

Base: All Respondents (2,049); Aged 18-34 (582); Females (1,072); Greater London (263); Those with communal bins (251); Those without cars (430)

Preference for info on WEEE recycling to be delivered via leaflets, signs, websites or on the products themselves



Q. How would you want to get information about where and how you can recycle small electrical items?



Those aged 55+ have a higher preference for **leaflets** and lower preference for **online**

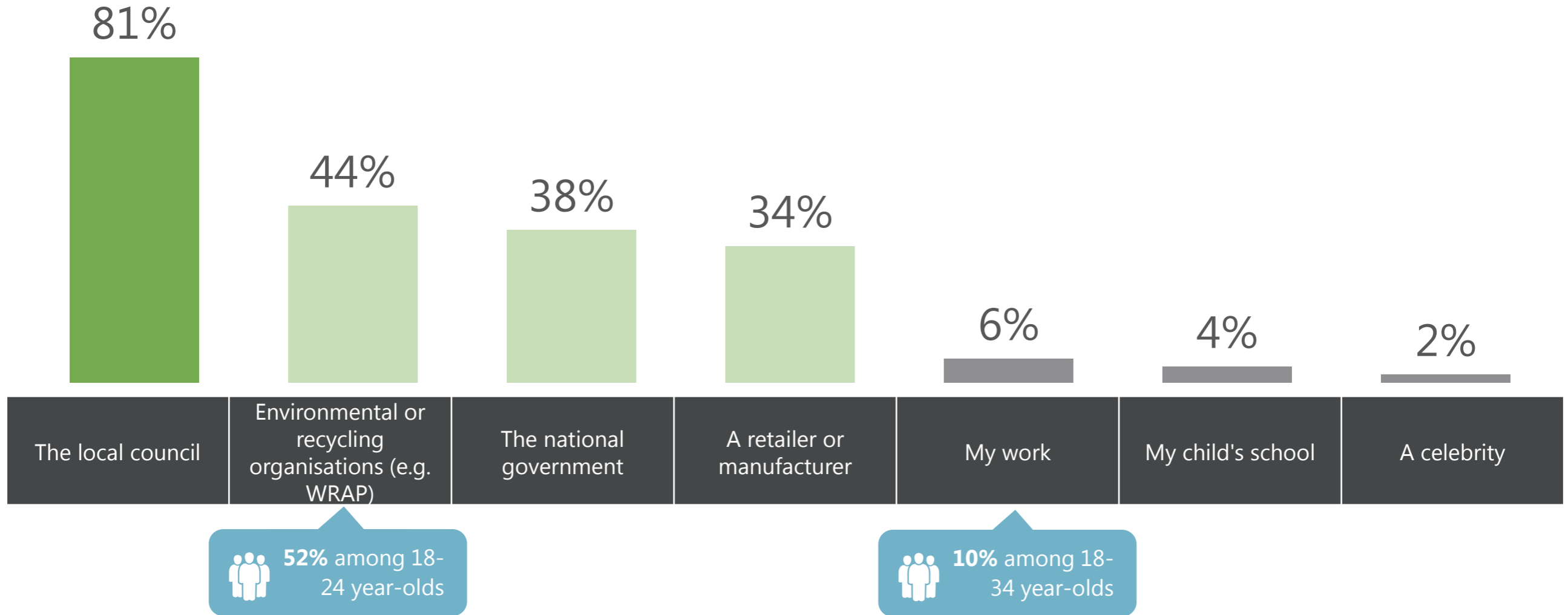


QC6. How would you want to get information about where and how you can recycle small electrical items?
 Base: All who say that they want to know more about how to recycle small electrical items (1,079); Those aged 55+(350)

Positive response to information being delivered by a range of sources; particularly local council



Who would you like this information on how you can recycle small electrical items to come from?



QC7. Who would you like this information on how you can recycle small electrical items to come from?
Base: All who say that they want to know more about how to recycle small electrical items (1,079); Those aged 18-24 (148); Those aged 18-34 (355)

Most room for improvement: Location

WEEE recycling rates and awareness lower in **urban areas**

Taken small electricals to tip / HWRC / Recycling Bank after they broke /became unusable in last 12 months

Aware small electricals can be recycled by taking to a local tip / dump / HWRC or recycling bank



QE3. What did you or others in your household do with the broken or unusable small electrical items? If this has happened more than once in any category please think about the last time it happened
 Base:; N. Ireland (43), North West (225), SE & Anglia (480), Scotland (178), SW & Wales (270), North & Yorkshire (261), Midlands (329), Greater London (263); Rural (304), Urban (1596)

QG3. Below is a list of different types of item that people typically have at home and need to dispose of at times. To the best of your knowledge, please answer if / how each type of item can be recycled in your local area
 Base:; N. Ireland (43), North West (225), SE & Anglia (480), Scotland (178), SW & Wales (270), North & Yorkshire (261), Midlands (329), Greater London (263); Rural (304), Urban (1596)

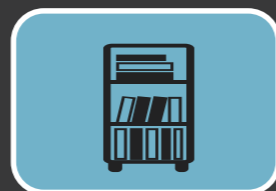
Most room for improvement: Audience

Compared to older age groups, 18-34 year-olds:

Less likely to have **taken** a broken/unusable WEEE item **to be recycled** recently
(33%)



More likely to have **hoarded** a WEEE item after it broke / became unusable
(27%)



More likely to say they **don't know** how small electricals can be recycled in their area or that items **cannot be** recycled
(21%)



More likely to **want to know more** about how to recycle small electrical items
(60%)



QE3. What did you or others in your household do with the broken or unusable small electrical items? If this has happened more than once in any category, please think about the last time it happened.

QG3. Below is a list of different types of item that people typically have at home and need to dispose of at times. To the best of your knowledge please answer if / how each type of item can be recycled in your local area.

QC5. Which of the following statement best applies to you?

b. I want to know more about how to recycle small electrical items

Base: 18-34 (582),

Most room for improvement: Categories binned

Light bulbs, Accessories and Batteries:

People most likely to have had these items **break or become unusable** in their household recently

% who have had item break/ become unusable in their household in P12 M



58%

Light bulbs



30%

Accessories



75%

Batteries

Most likely to have been thrown in the **general rubbish** after breaking or becoming unusable

% say they / someone in household thrown in bin last time broke / became unusable



53%

Light bulbs



44%

Accessories

Particularly By:
18-34: 48%
35-54: 52%



23%

Batteries

Particularly By:
18-34: 33%

Accessories and **light bulbs** also have the highest rates of **uncertainty** about **if** and **how** they can be **recycled**

% not sure if / how type of item can be recycled



47%

Light bulbs



49%

Accessories



QE3. What did you or others in your household do with the broken or unusable small electrical items? If this has happened more than once in any category please think about the last time it happened
Base: All who have had each type of item break/ become unusable in past 12 months: Computers (278); Mobile phones (428); Household appliances without a built-in battery (612); Household items that have a built-in battery (2560); Accessories (615); Digital cameras (59); Lamps (185); Batteries (1,556); Light bulbs (1,206).

QE2. In the past 12 months which, if any, of the following items have broken or become unusable in your household?
Base: All respondents (2,049)

QE1. Below is a list of different types of small electrical items that people typically have at home and need to dispose of at times (for example because they are broken or no longer needed) Please select if / how each item can be recycled in your local area
Base: All respondents (2,049)

Most room for improvement: Categories hoarded

Mobiles, batteries, accessories and computers categories most likely to be hoarded

% who say that in their home they have broken or unused...



Especially among



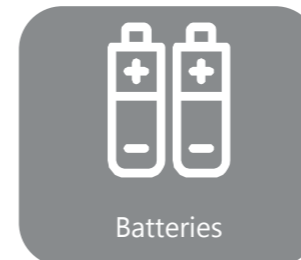
Mobile phones

44%



Computers

31%



Batteries

44%



Accessories

37%

Households with children aged 12-17



55%

37%

54%

51%

Summary & Conclusions

Overview

- Clear issue in the WEEE category with **throwing WEEE in the normal bin** or **hoarding it**
- This is despite **pro-recycling attitudes** and **desire to recycle more**
- Key reasons for disconnect between wanting to recycle and not actually doing it are **convenience** and **lack of understanding / awareness**, particularly regarding **specific types** of electricals
- There is also a general **lack of knowledge** regarding the **specific benefits** of recycling WEEE and how these link to broader environmental values
- **Desire to know more** about where and how to recycle WEEE

Summary & Conclusions

Implications for communications: Focus and Targeting

- Some confusion about what counts as 'small electricals' and behaviour / attitudes / barriers vary by category of WEEE, so communications may need to be **category-specific**
- To address issue of throwing WEEE in **general rubbish**, and small, low-value WEEE such as **lightbulbs, batteries** and **accessories** are priority
- For **hoarding, mobiles, batteries, accessories** and **computers** are key categories
- Recycling rates and awareness of recycling routes lower in **urban areas**
- **Younger age group** (18-34) have the most room for improvement in terms of both behaviour and knowledge/awareness, and also the **highest desire** to receive more information

Summary & Conclusions

Implications for communications: Messaging

- Desire for communications with **practical information** on **where and how** to recycle.
- **Convenience**, particularly easy / convenient drop-off points, highlighted as key for getting people to recycle more WEEE, and positive response to **collection / drop off points**; where these exist, priority should be **making people aware of them**
- Practical information is key but other messaging may also be necessary to motivate some; most motivating reasons to recycle are those related to **harming wildlife** and the **natural environment**, and **reducing landfill**. WEEE has low profile compared to other recycling/ environmental issues; may be an opportunity to build on high profile issues/ engagement
- Reasons for hoarding and therefore messages needed vary by category; for hoarded mobiles and computers, **data security** is a key barrier
- Clear preference for information to come from **local council**, but also a desire to have this from **environmental organisations**, the **government** or **retailers and manufacturers**

Thank you.

Ipsos MORI's standards and accreditations

Ipsos MORI's standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.



ISO 20252:2012

The international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.



MRS Company Partnership

By being an MRS Company Partner, Ipsos MORI endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation.



ISO 9001:2008

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



ISO 27001:2005

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

Data Protection Act

Ipsos MORI is required to comply with the Data Protection Act; it covers the processing of personal data and the protection of privacy

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252:2012 and with the Ipsos MORI Terms and Conditions.

Material Focus is an independent, not-for-profit organisation on a mission to save valuable, critical and finite materials inside electricals from going to waste. We do this through...

Insights

We identify, produce and share insights to improve the UK e-waste system and inform policy decisions.

Investments

We identify and fund projects that make it easier to reuse and recycle; or that encourage circular design.

Inspiration

We inspire, educate and encourage the UK public to fix, donate, sell and recycle their unwanted electricals through our Recycle Your Electricals campaign.

www.materialfocus.org.uk