



Consumer research

Consumer research: electrical recycling services preferences

August 2024





The research process

Survey approach

Online panel survey among UK adults 18+:

Market: UK (including Northern Ireland)

Target audience: UK adults aged 18 and over. Nationally representative in terms of age, gender, region and working status.

Sample size: 2,000

Survey length: 10-minutes

Fieldwork dates: March 2024

Targeting method: Survey panel

Questionnaire outline

Screeners & demographics

Age, gender, region, working status, property type, area live in, car driver or not

Awareness and behaviours

Prompted awareness of recycling, attitudes to recycling, behaviours

MaxDiff

Participants shown attributes across 4 scenarios and asked to select most and least preferred

Appeal of possible solutions

Consideration for different ways to recycle



Exploring preferences through a max diff exercise

How MaxDiff analysis works...

MaxDiff uses a dynamic approach



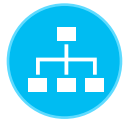
A MaxDiff exercise enables us to build up a motivational landscape by taking into account the dynamic context of decision-making.



Respondents are presented with a series **of trade-offs between competing propositions**, and asked to pick which is their **most and least preferred option** for that scenario.



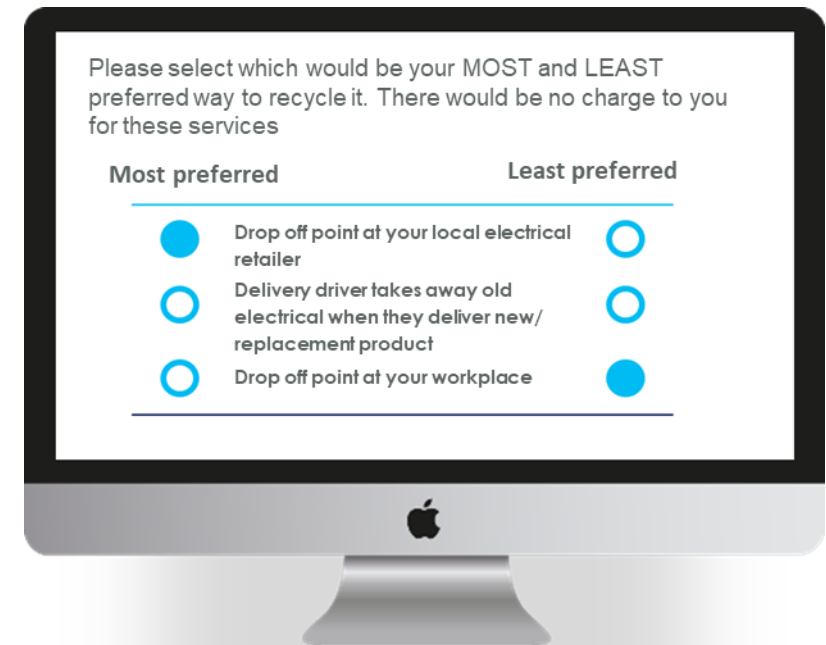
Respondents repeat the task with statements drawn at random to be traded off against one another.



Through multiple iterations, this builds up a picture of a hierarchy of propositions, ranked according to relative preference.

Think about a scenario where you wish to recycle a small electrical item such as a kettle, electric toothbrush or hairdryer.

We are going to show you a series of screens. Each screen will include a list of possible ways in which you could recycle your small electrical item.



Scenarios tested

Scenario 1

Think about a scenario where you wish to recycle a small electrical item such as a kettle, electric toothbrush or hairdryer...

Scenario 2

Think about a scenario where you wish to recycle a medium-size electrical item such as a microwave a vacuum cleaner or a computer screen...

Scenario 3

Think about a scenario where you wish to recycle a large electrical item such as a fridge, washing machine, oven or television...

Scenario 4

Think about a scenario where you wish to recycle personal technology such as an old phone, tablet or laptop...

In scenarios 1 and 4 we tested the same list of 13 propositions (or ways you could recycle). For scenarios 2 and 3 the list was shortened so it was relevant to the items being recycled.



The propositions we tested

- 1 Drop off point at local school, college or university
- 2 Drop off point at your workplace
- 3 Drop off point at local public building (e.g. townhall or library)
- 4 Drop off point at your local electrical retailer
- 5 Drop off point at your local supermarket
- 6 Drop off point at your local recycling centre/ tip
- 7 Drop off at local on-street recycling bank
- 8 Bookable household collection (courier collects old electricals from your door)
- 9 Bookable household collection (leave old electricals outside your home for collection)
- 10 Delivery driver takes away old electrical when they deliver new/ replacement product
- 11 Fortnightly household collection (similar to general household recycling)
- 12 Monthly household collection (similar to general household recycling)
- 13 Weekly household collection (similar to general household recycling)

High-level summary

Scenario 1:

The most preferred option for recycling a **small electrical item**, such as a kettle, electric toothbrush or hairdryer was via a **household collection similar to general household recycling**. This attribute, with the three frequency options, occupied the top three preferred options across the 13 attributes tested. The preferred frequency was weekly, following by monthly and then fortnightly. The fourth preferred option was delivery driver takes away old electrical when they deliver the new product.

Scenario 2:

Weekly household collection was also the most preferred option for recycling **medium electrical items**, however **delivery driver taking away** the old electrical on delivery of a new one, was second placed.

Scenario 3:

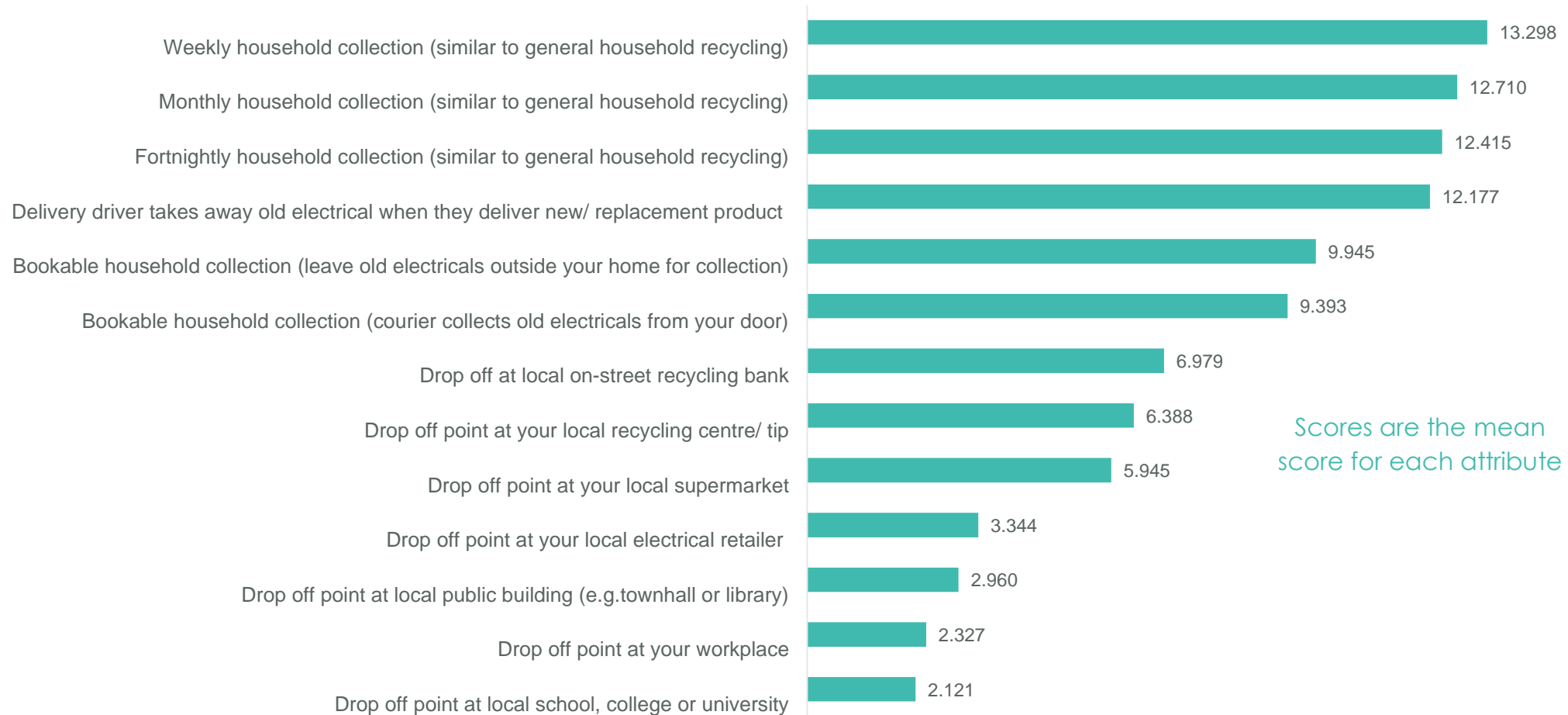
Delivery driver takes old electrical when they deliver new product moved up into first place and was the most preferred option for recycling **large electrical items** by some margin. This was followed by **weekly household collection**. The concept of a bookable household collection was more highly favoured when considering recycling larger items and featured third on the list.

Scenario 4:

The same pattern of preference that was seen for scenario 1 was replicated for **recycling personal tech**, such as a phone or laptop i.e. **weekly household collection, followed by monthly, then fortnightly**.

Across all scenarios, recycling at any of the drop off points tested, were the least preferred options. Consumers chose easy and convenient attributes as their preferred options, largely this was either a household collection in line with what is in place now for household recycling, or for larger items, it being take away by the delivery driver.

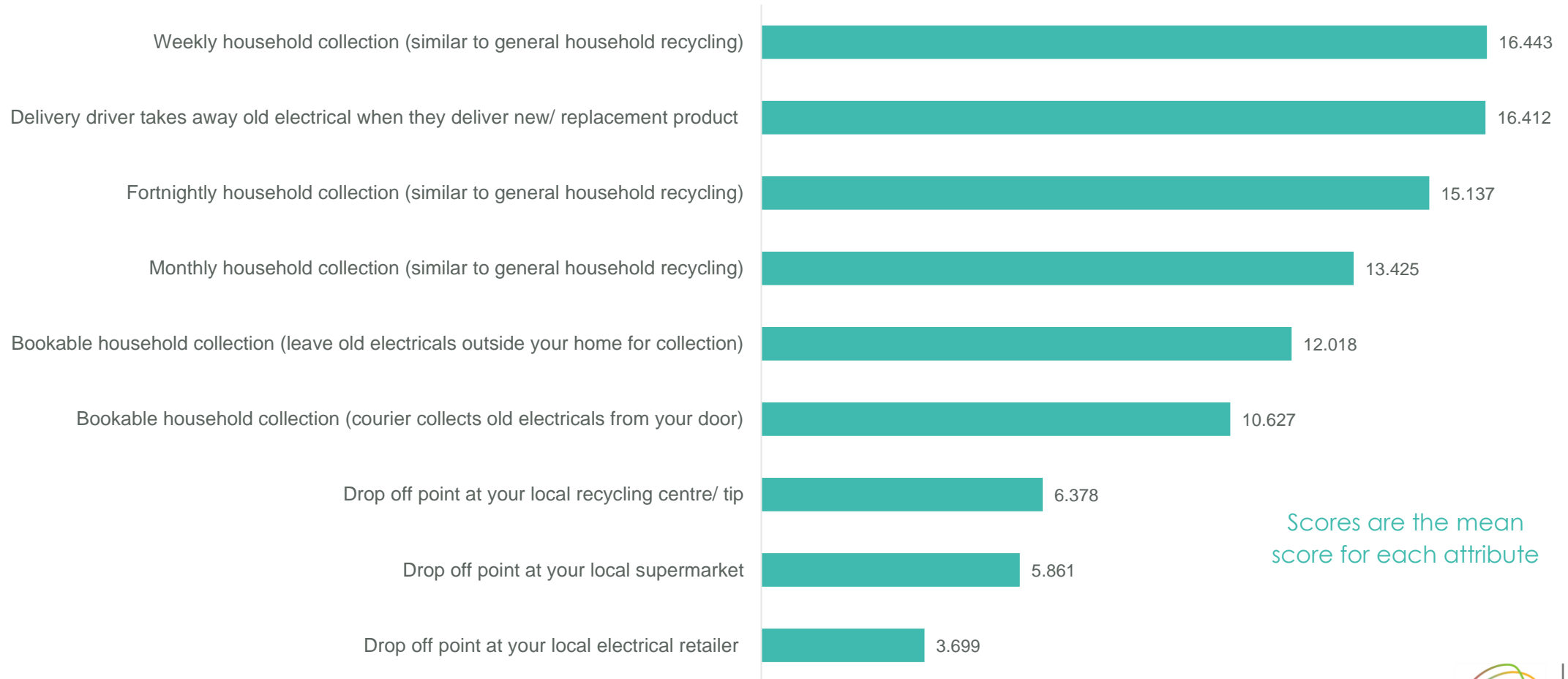
Think about a scenario where you wish to recycle a small electrical item such as a kettle, electric toothbrush or hairdryer



Q5. We are going to show you a series of screens. Each screen will include a list of possible ways in which you could recycle your small electrical item. Please select which would be your MOST and LEAST preferred way to recycle it. There would be no charge to you for these services (991)



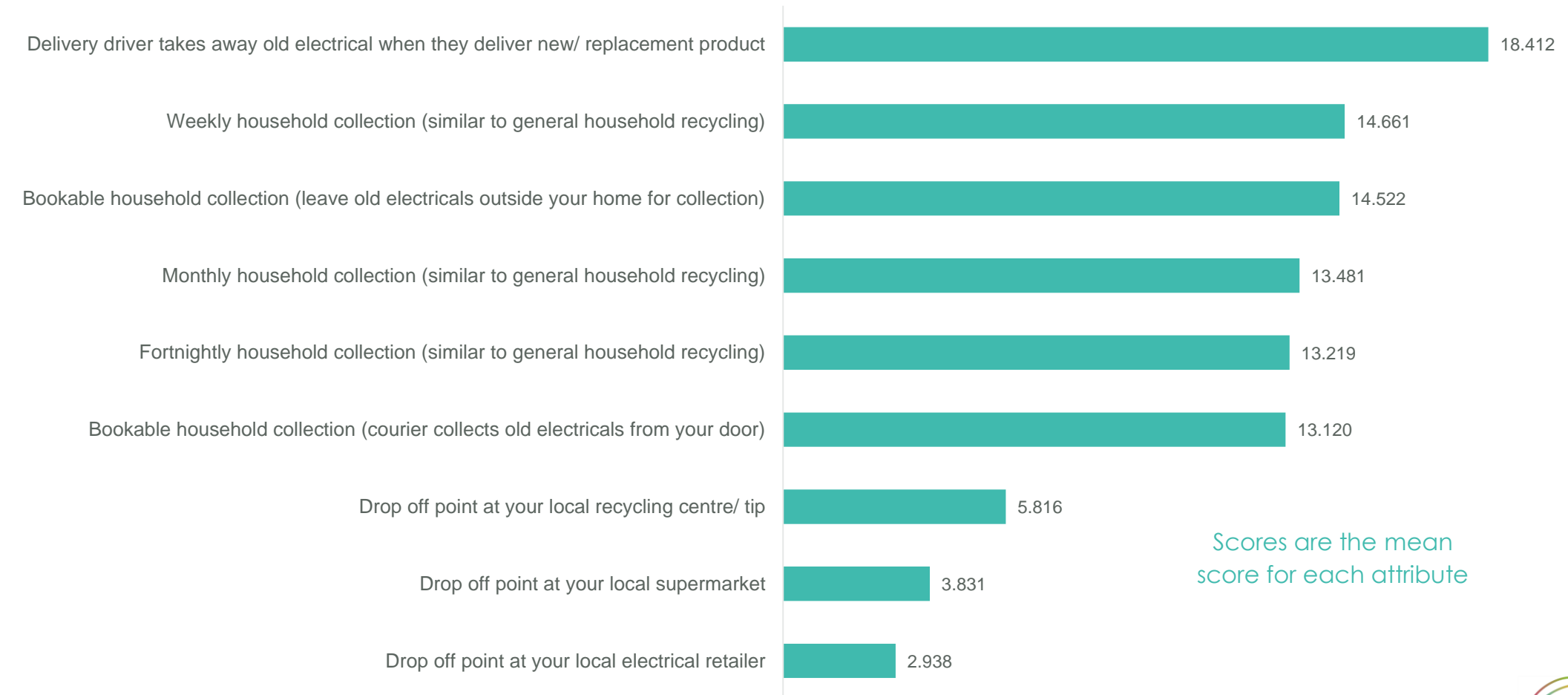
Think about a scenario where you wish to recycle a medium-size electrical item such as a microwave or a vacuum cleaner



Q5. We are going to show you a series of screens. Each screen will include a list of possible ways in which you could recycle your medium electrical item. Please select which would be your MOST and LEAST preferred way to recycle it. There would be no charge to you for these services (1014)



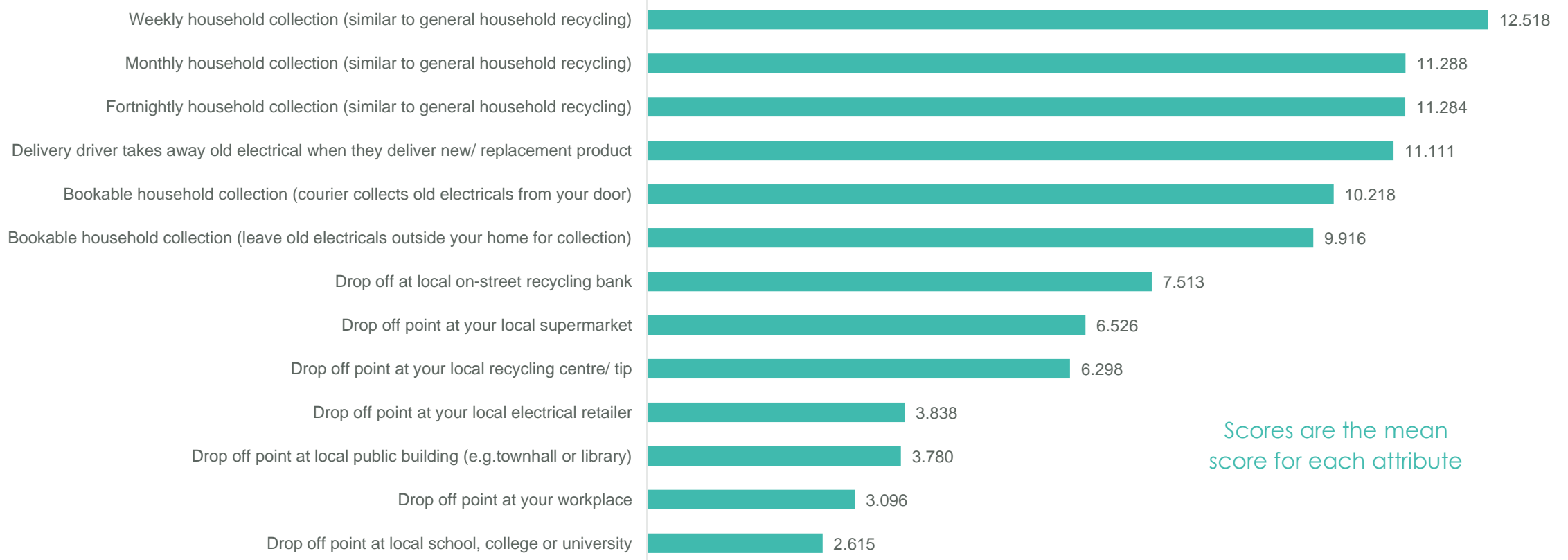
Think about a scenario where you wish to recycle a large electrical item such as a fridge, washing machine, oven



Q5. We are going to show you a series of screens. Each screen will include a list of possible ways in which you could recycle your large electrical item. Please select which would be your MOST and LEAST preferred way to recycle it. There would be no charge to you for these services (985)

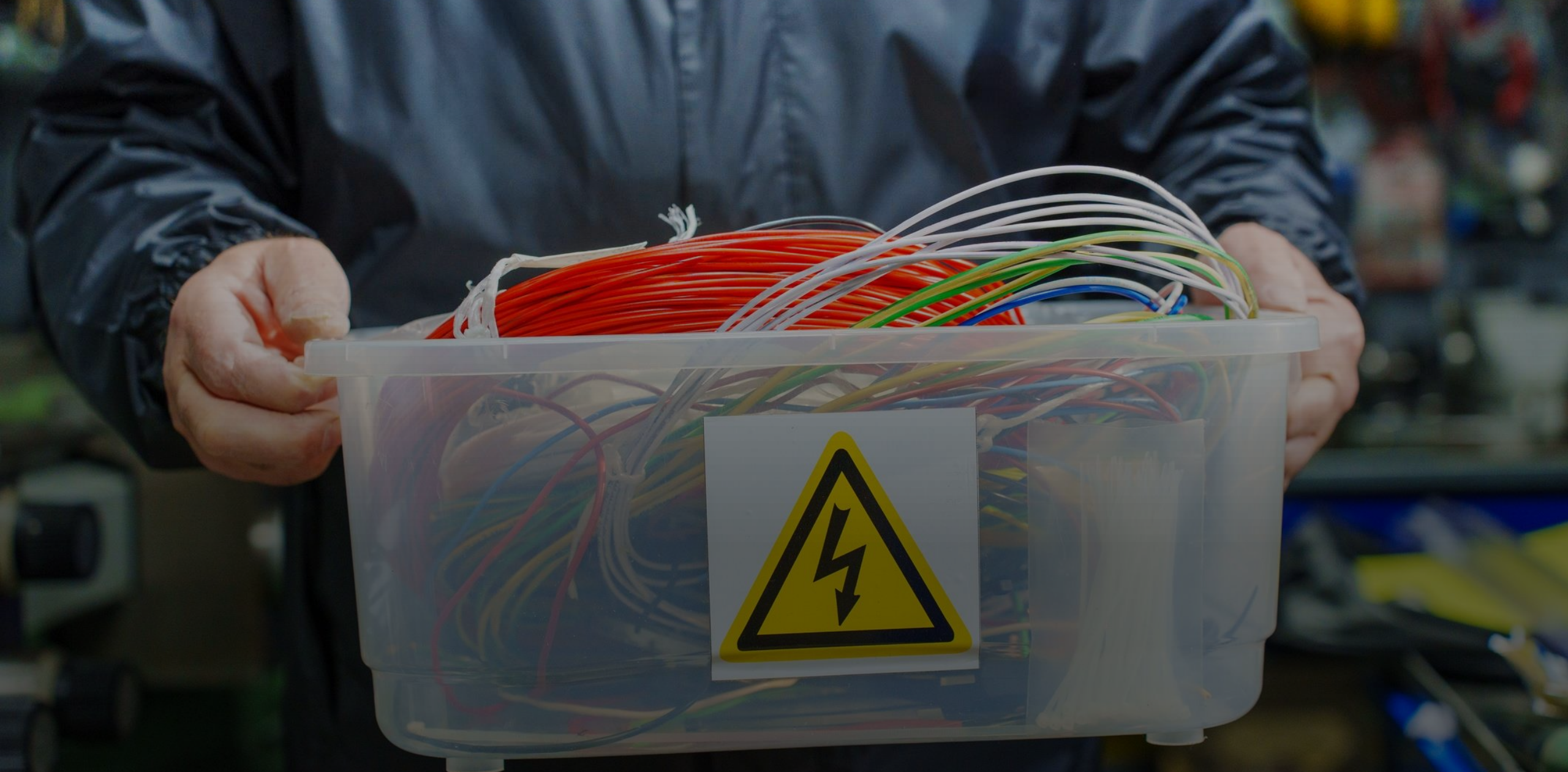


Think about a scenario where you wish to recycle personal technology such as an old phone, tablet or laptop



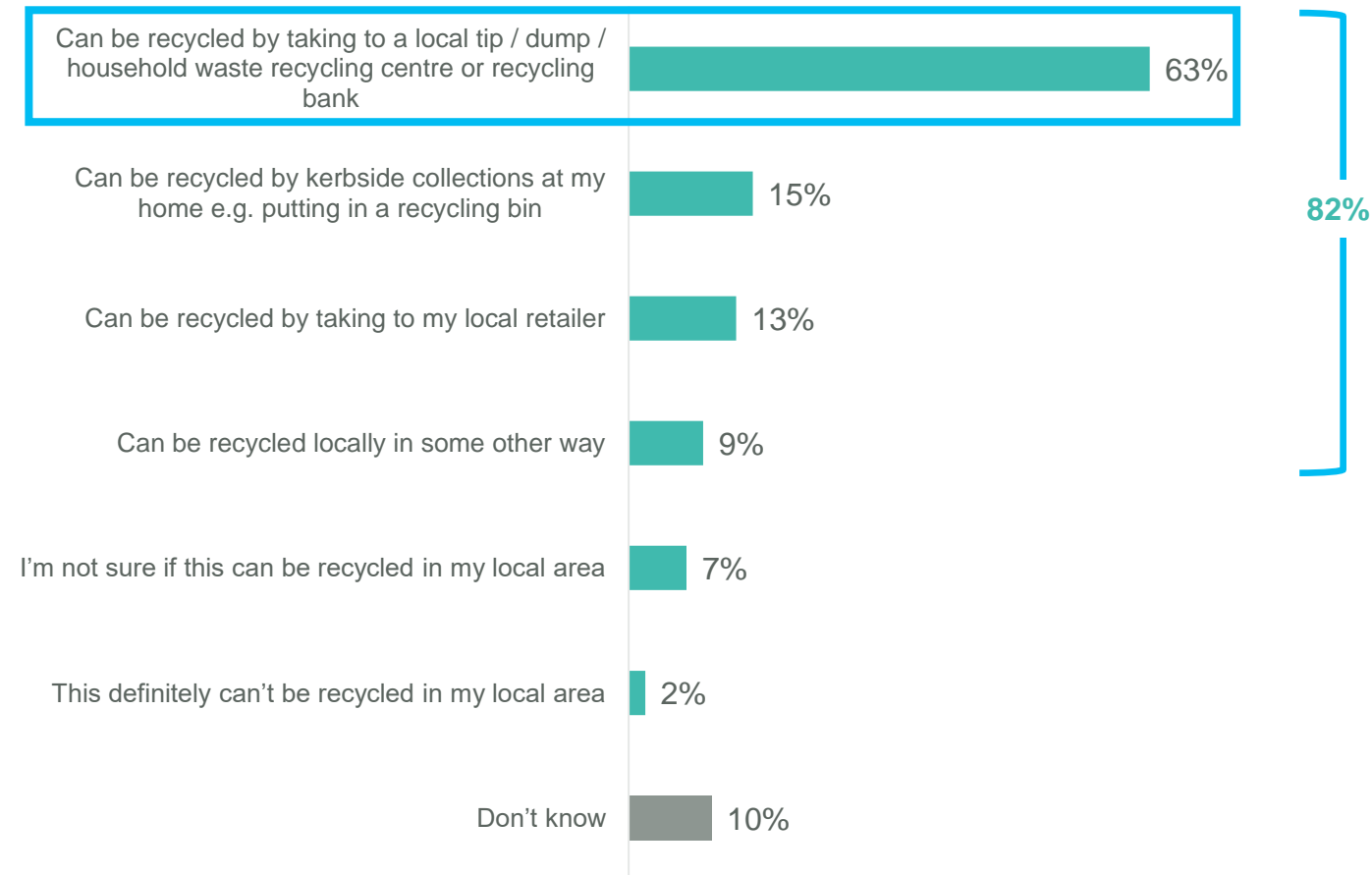
Scores are the mean score for each attribute

Q5. We are going to show you a series of screens. Each screen will include a list of possible ways in which you could recycle personal technology . Please select which would be your MOST and LEAST preferred way to recycle it. There would be no charge to you for these services (1010)



Attitudes towards disposing of electrical items

How would you dispose of small electrical items such as a kettle, electric toothbrush or hairdryer... in your local area



Those in the younger age group (18-34) are significant less likely than those 35+ to be aware they can **recycle small electricals at their local tip**

18-34 - 52%
35-54 - 64%
55+ - 71%

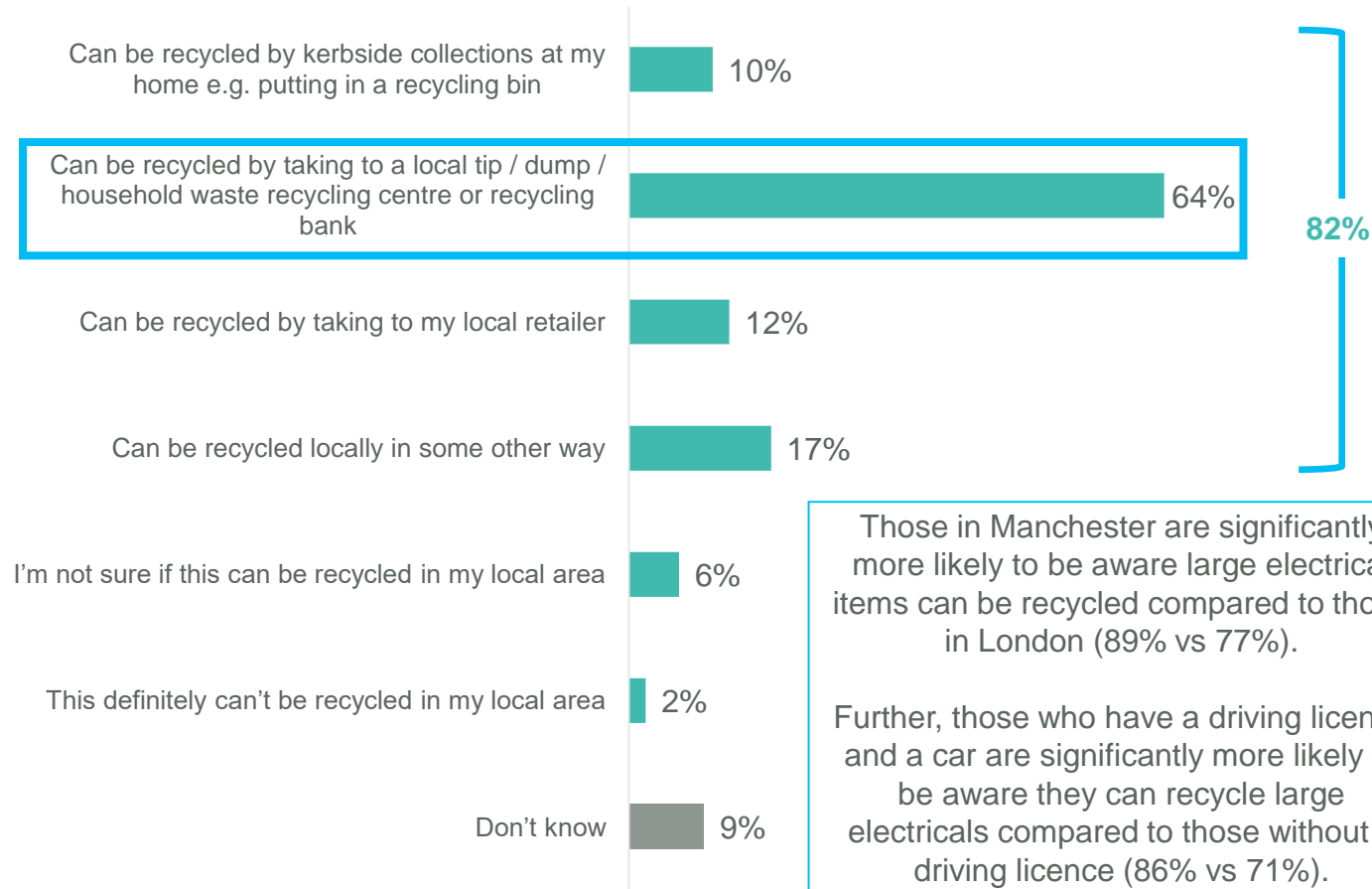
This is also the case for those who live in London compared to the rest of the UK and those who live in urban areas compared to rural

57% - urban
72% rural

Males and those who are older (35+) are more likely to be aware that these types of electricals can be **recycled in general.**

Awareness is also higher among those who own and drive car

How would you dispose of large electrical item such as a fridges, washing machines or televisions ... in your local area



Those in the younger age group (18-34) are significant less likely than those 35+ to be aware they can **recycle large electricals at their local tip**

- 18-34 - 50%
- 35-54 - 65%
- 55+ - 73%

This is also the case for those who live in London compared to the rest of the UK and those who live in urban areas compared to rural

- 58% - urban
- 71% rural

Those in Manchester are significantly more likely to be aware large electrical items can be recycled compared to those in London (89% vs 77%).

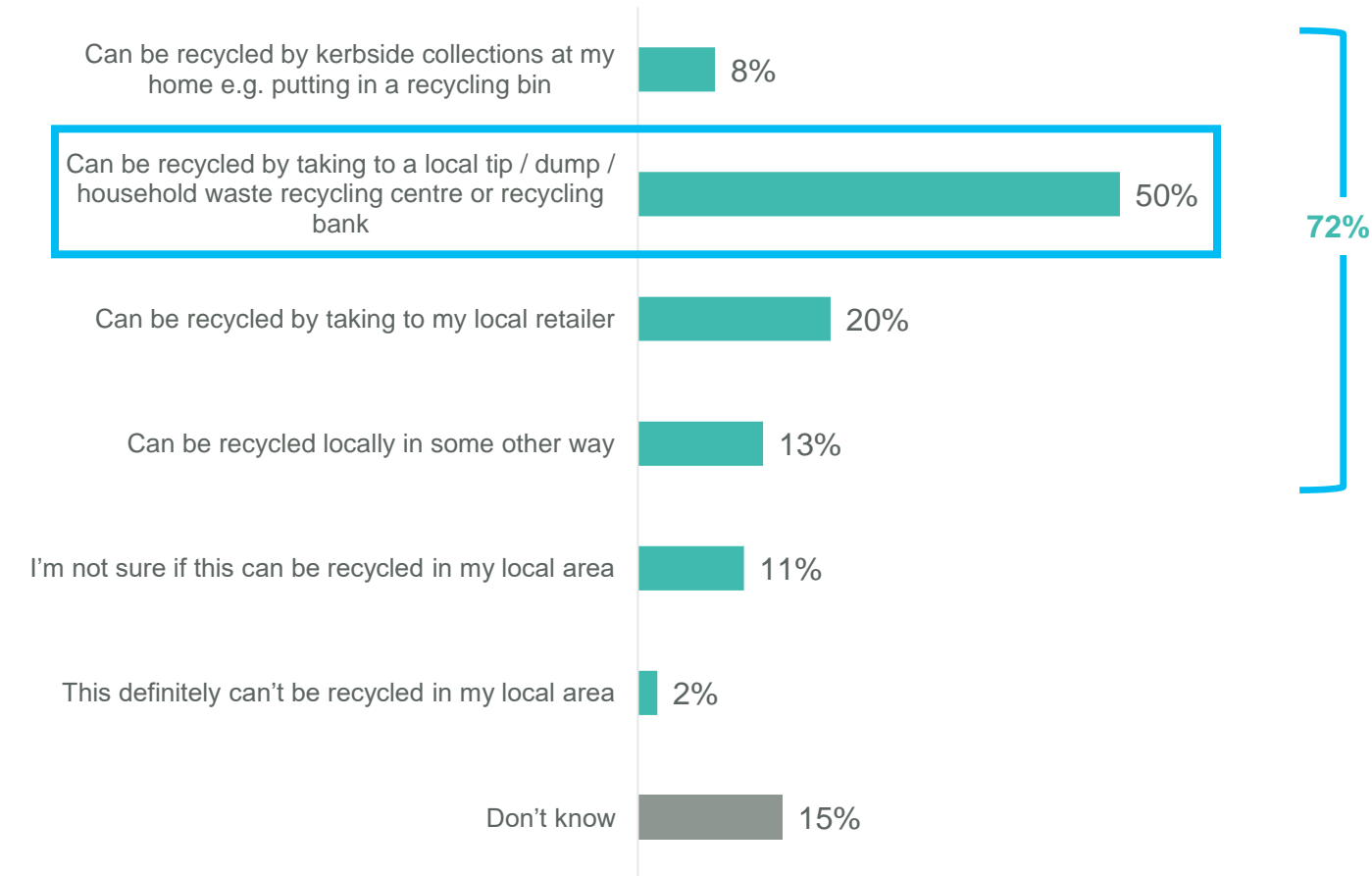
Further, those who have a driving licence and a car are significantly more likely to be aware they can recycle large electricals compared to those without a driving licence (86% vs 71%).

There are higher levels of awareness of **kerbside collections** and **retailer takeback** among males than females.

Retailer takeback is also more likely to be a concept that the younger age group are aware of, compared to those who are older for this type of electrical. This is also the case for those who live in urban areas, compared to rural.

Q1. Below is a list of different types of items that people typically have at home and need to dispose of at times. To the best of your knowledge please answer if or how each type of item can be disposed of in your local area.. Base (2000)

How would you dispose of personal tech devices such as a laptops, mobile phones or tablets... in your local area

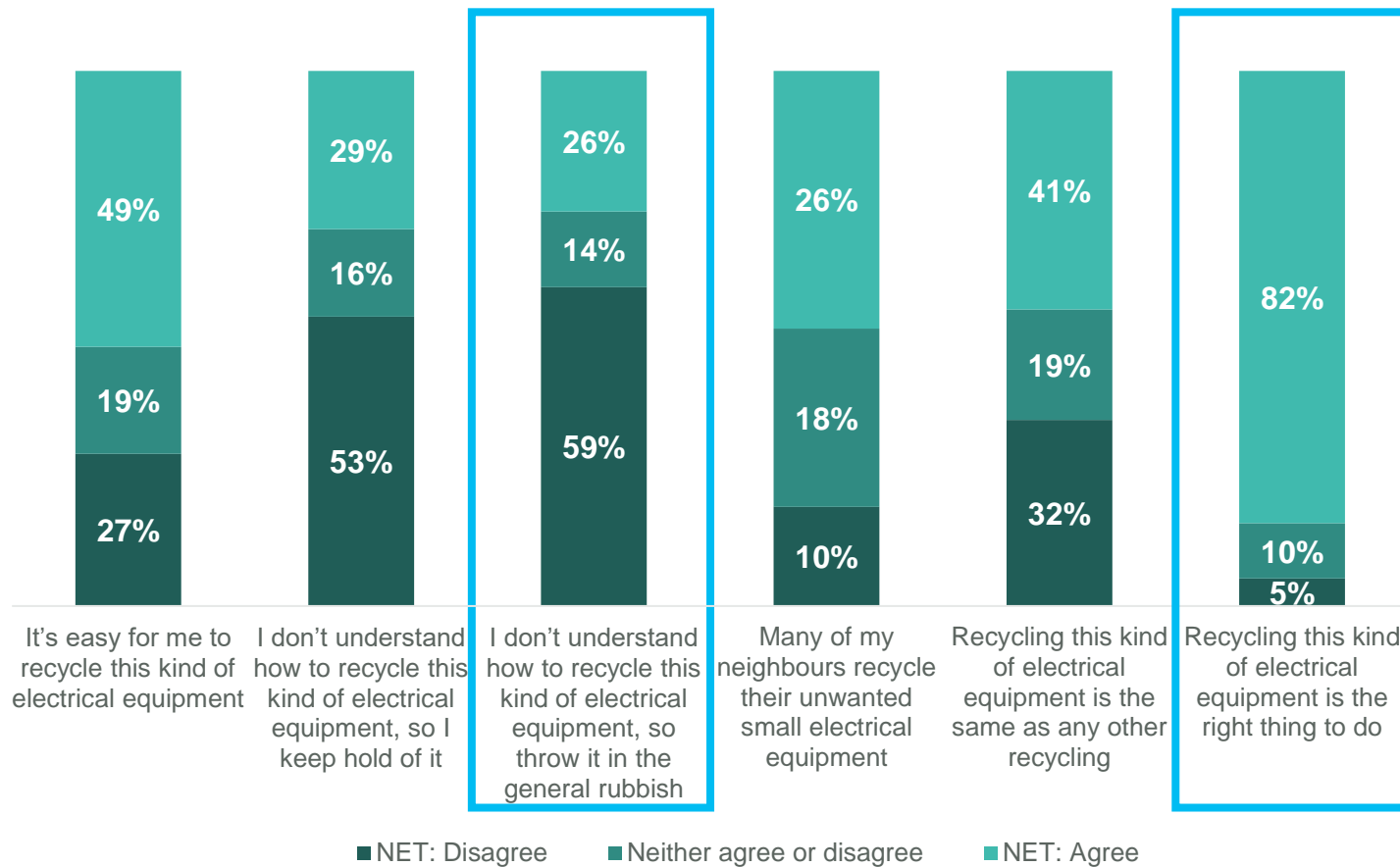


Men, and those who are older, are more likely to be aware that personal tech can be recycled at local tips.

Whilst those who are younger have lower awareness overall that these items can be recycled, they are more likely to be aware than those aged 35+ that they can be recycled via kerbside collections.

Those who live in urban areas are also more likely than those in rural areas to be aware of retailer take back.

Attitudes towards recycling small electric items such as kettles, electric toothbrushes or children's toys



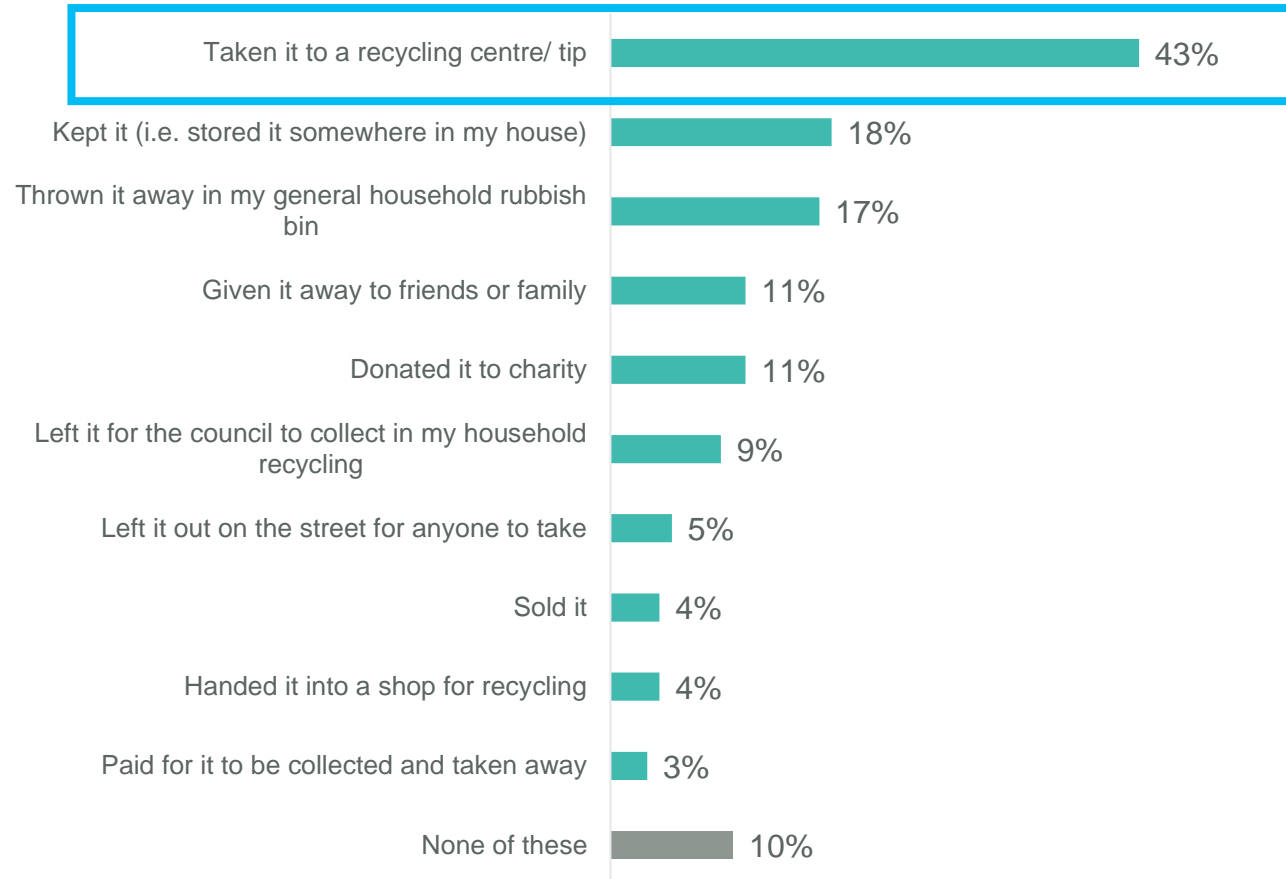
Those who are younger have lower levels of awareness as to how to recycle this type of equipment. More than two-fifths (42%) agree they don't understand, compared to 15% of those aged 55+.

Those who live in London are significantly more likely to throw small electrical items in the general rubbish compared to those in the East of England (35% vs 18% respectively).

Further, those who live in an urban area are significantly more likely to do this (34% vs 23% suburban and 18% rural).

Those who are older and those who live in the South East are significantly more likely to agree that recycling small electric equipment as being the right thing to do (88% vs 74% London).

Unused or broken small electrical items are most likely to be taken to a local tip or recycling centre



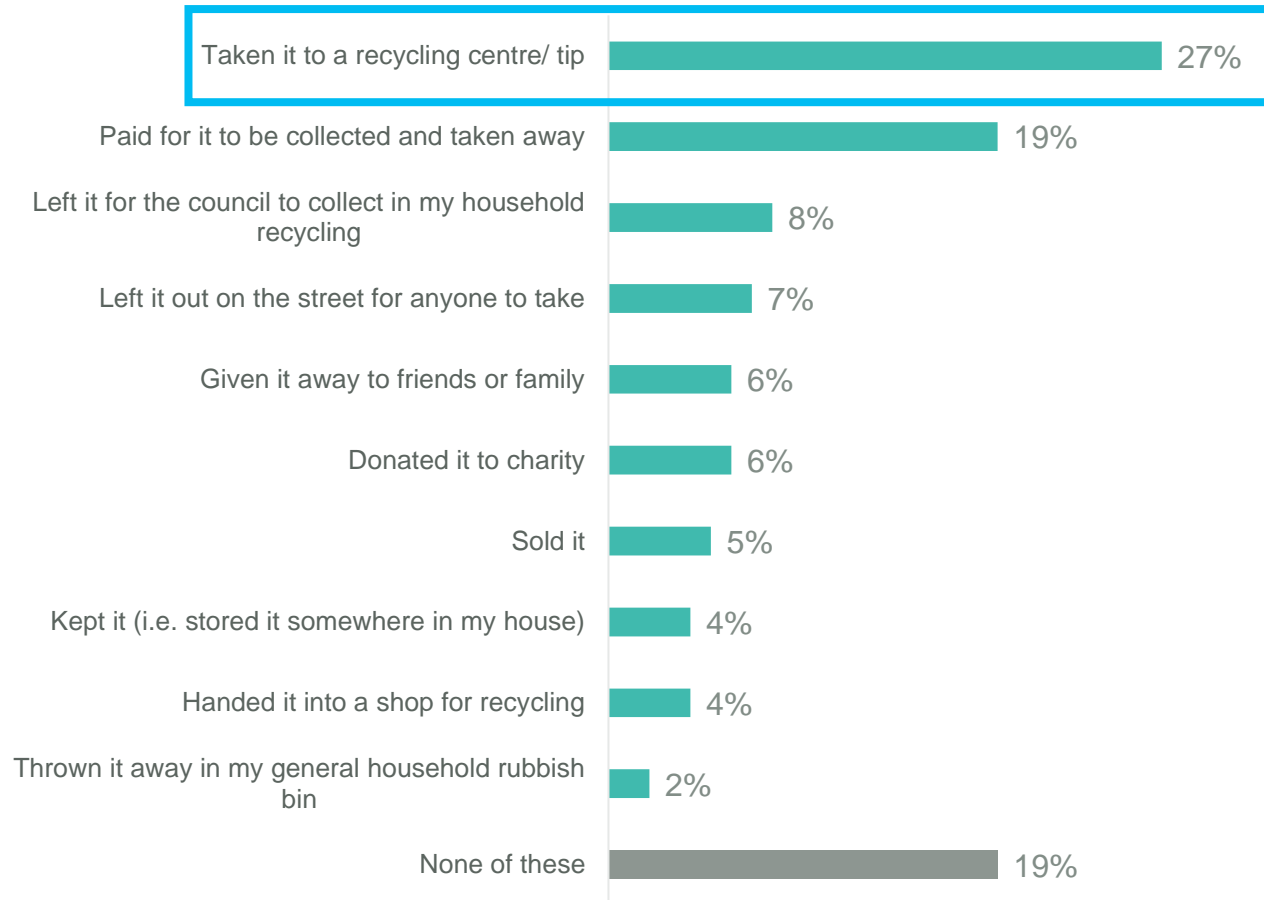
Those in a detached property are significantly more likely to have taken small electrical items to a recycling tip in the past 12 months compared to those in a flat (52% vs 31% respectively).

Further, those with no driving licence or car are least likely to do this (29% vs 48% own a car and drive it).

Those in the younger age group (18-34) are more likely to throw these items away in their household rubbish (21% compared to 11% of those over 55).

Those in the South West are also more likely than most of the rest of the UK to dispose of these small items in this way.

This is also the case for unused large electrical items however almost a fifth pay for them to be collected and taken away

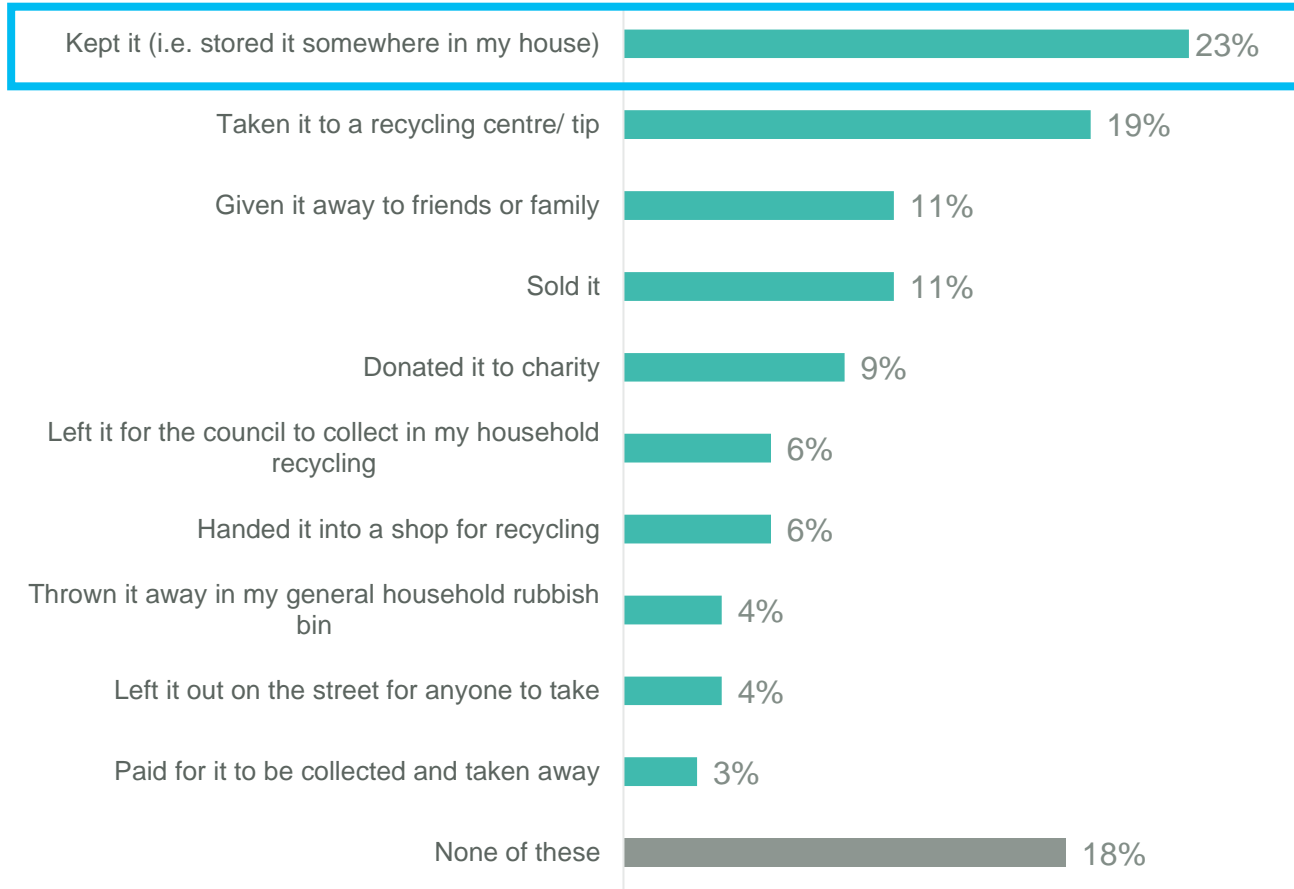


Those in a detached property are significantly more likely to have taken large electrical items to a recycling tip in the past 12 months compared to those in a flat (33% vs 18% respectively).

Further, those in Northern Ireland (38%) have recycled large electrical items in a tip compared to those in the North East (16%) and London (17%).

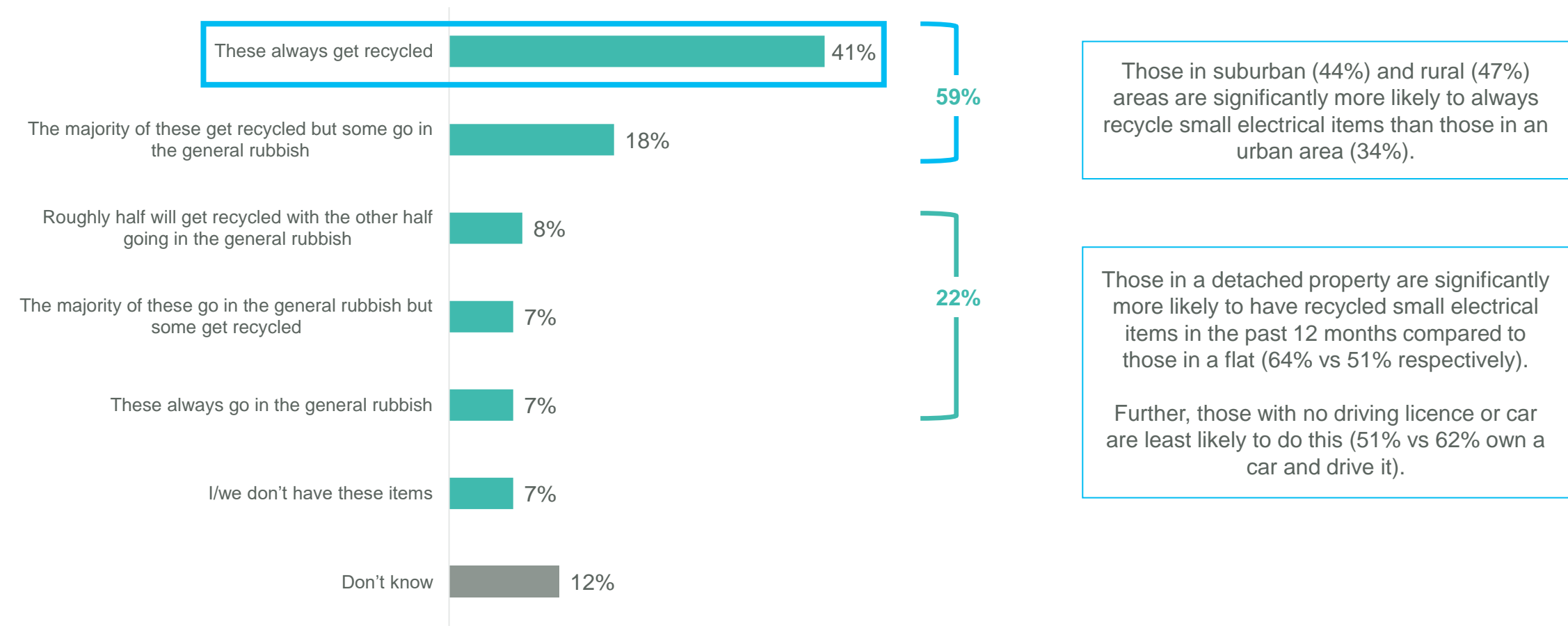
Respondents who live in a townhouse (4%) are significantly less likely to do none of the options given compared to those in a flat, terraced house or semi-detached house (all at 21%).

Unused or broken personal tech devices are likely to be kept by around a quarter, with a fifth taking them to a recycling centre



There is less differentiation with how these items are disposed of across the demographic groups. Men are slightly more likely than women to take them to a tip and women slightly more likely to take to a shop for recycling (although the proportions in this latter category are low for all)

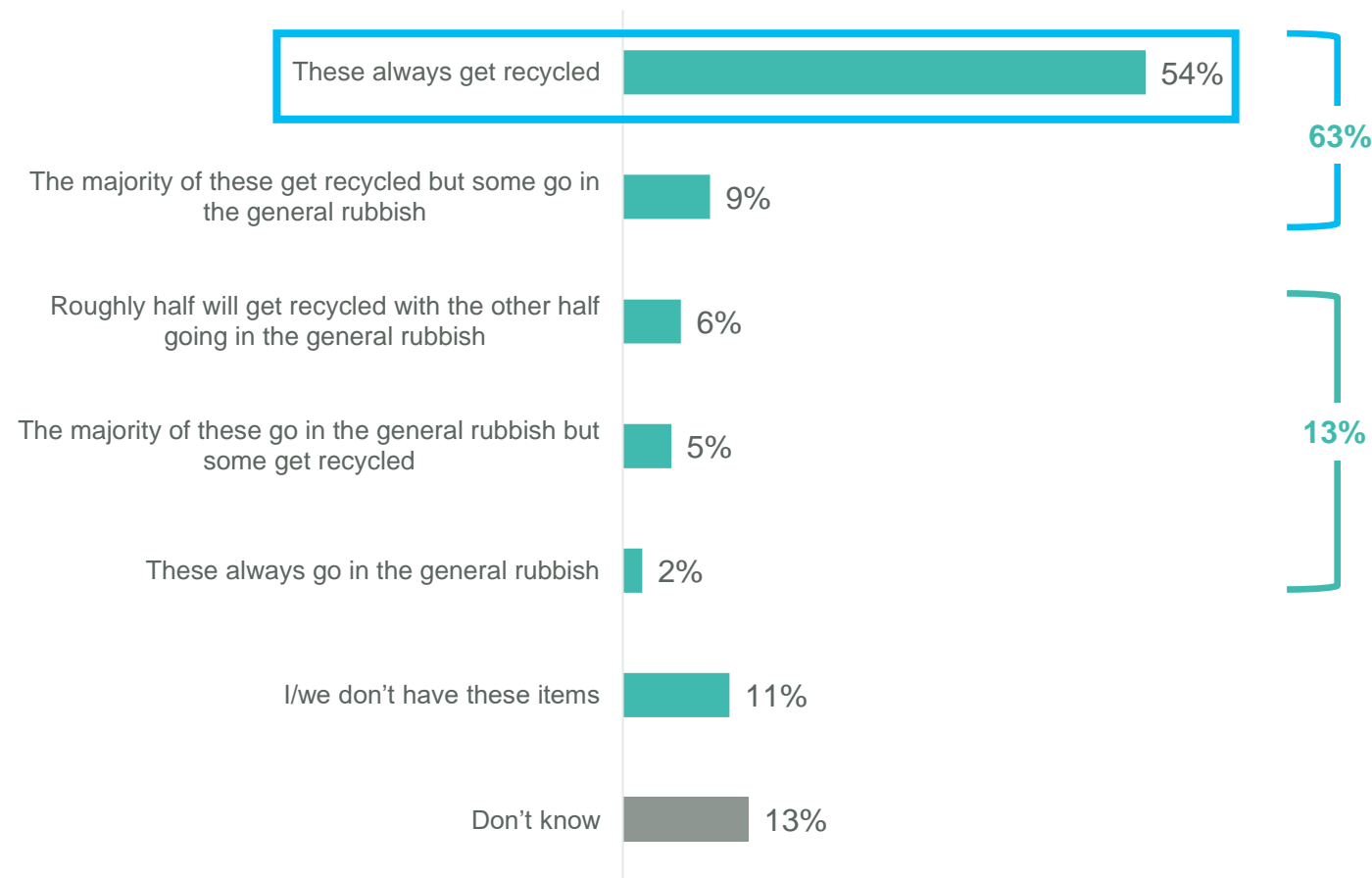
Small electricals are recycled in some way by three-fifths but are also sometimes or always thrown away by nearly a quarter



Q4. Thinking about the same items now. Typically, over the last 12 months, what proportion have you (or other members of your household) recycled or thrown into the general rubbish? Base (2000)



Large electrical items are more likely to always get recycled



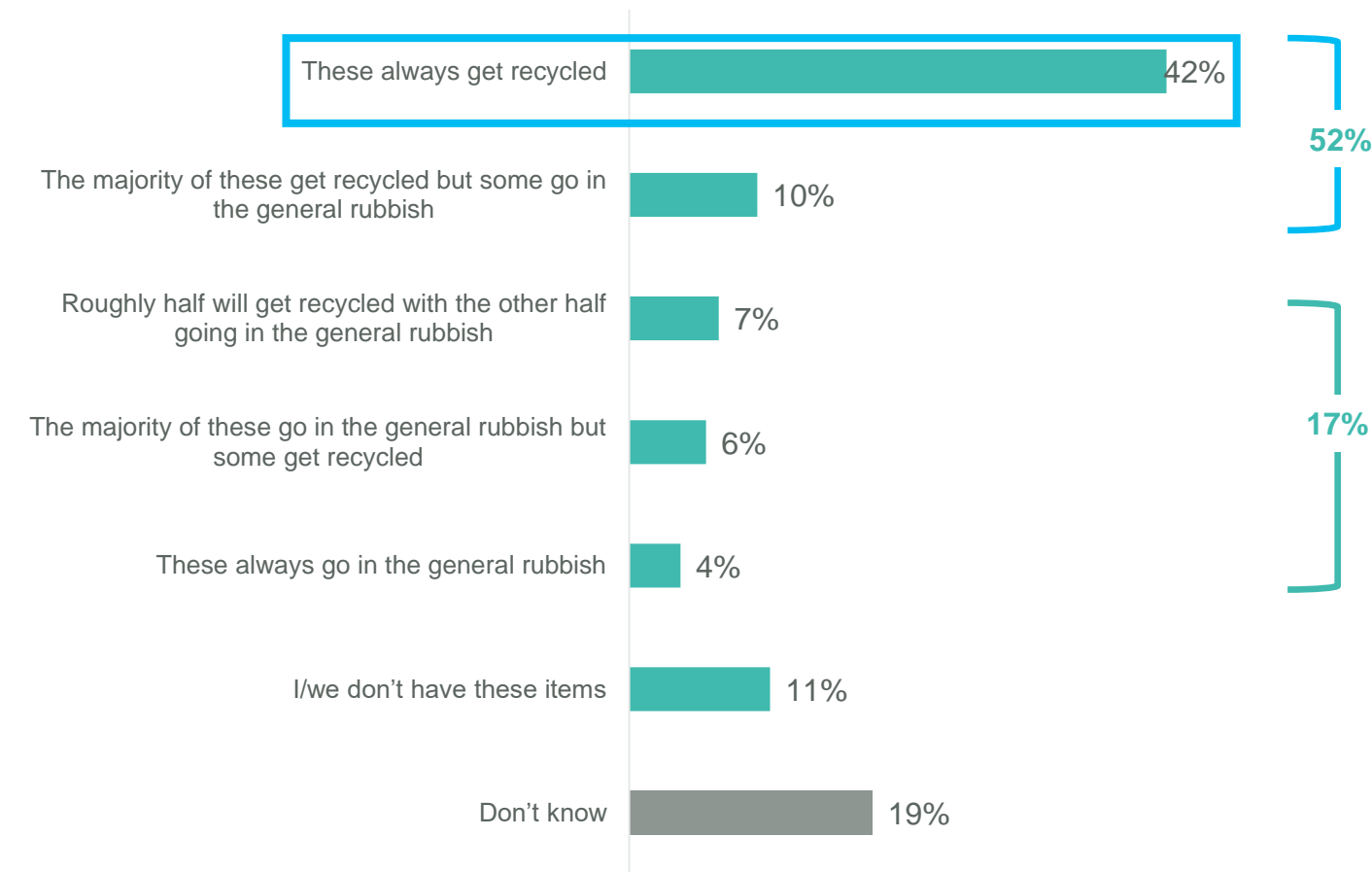
Larger items are much more likely to always be recycled by those who are older (69% of those aged 55+ compared to 34% of those aged 18-34).

Those in the North West and Wales are significantly more likely to recycle large electrical items (73% both) compared with London (53%).

Further, those in a rural area are significantly more likely to recycle large electrical goods compared with those in urban areas (71% rural vs 58% urban).

Q4. Thinking about the same items now. Typically, over the last 12 months, what proportion have you (or other members of your household) recycled or thrown into the general rubbish?
Base (2000)

Less than half have always recycled personal tech devices in the past 12 months

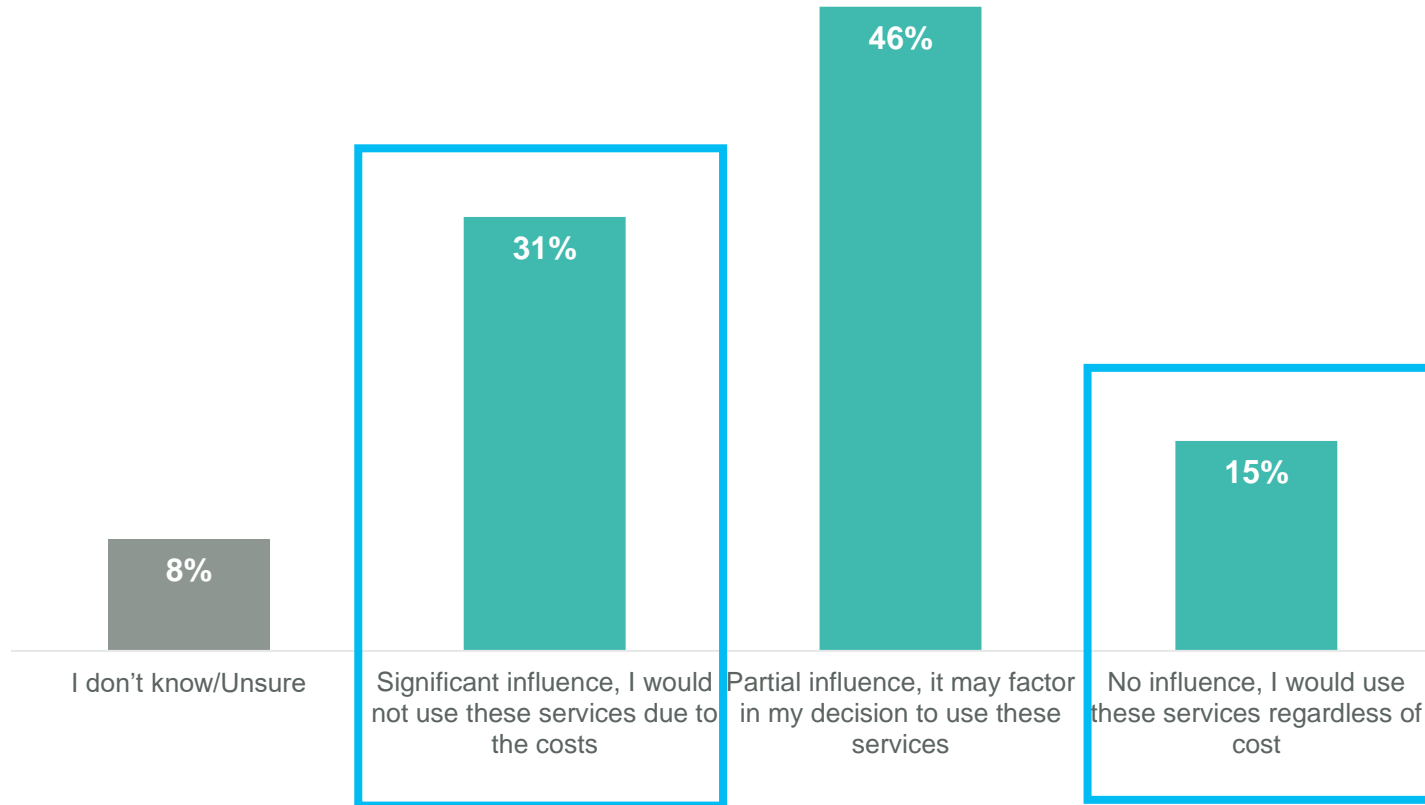


Those in rural areas are significantly more likely to always recycle their personal tech devices in comparison to those in urban areas (49% vs 36% respectively).

Further, those in a bungalow are significantly more likely to always recycle their personal tech devices compared to those in a flat (52% vs 37% respectively) – most likely reflection of the potential age range of those in these types of properties as it also aligns that those who are older are more likely to recycle than those who are younger.

Those in Northern Ireland (64%) and the East of England (65%) are significantly more likely to recycle their personal tech devices compared with those in London (45%).

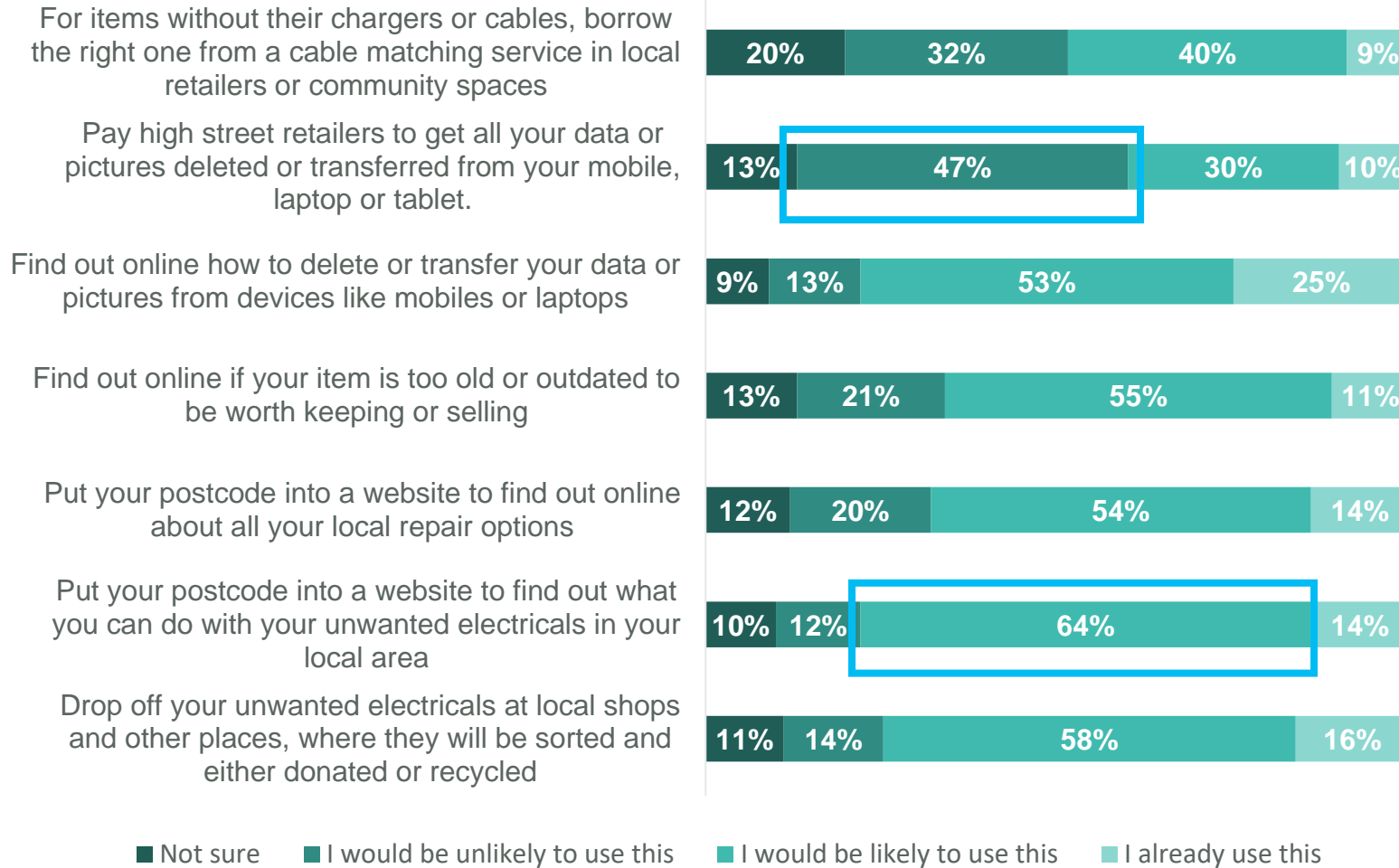
Having to pay for bulky waste recycling services would have an impact on likelihood to use for most



Charging for the collection of bulky waste does have an influence, either partial or significant, for the majority on whether the services would be used. For those who are younger, it would have a partial influence, but it is more likely to have a significant impact on usage of the service among those who are older.

Q10. Retailers may offer a takeback service where they collect your 'bulky' electrical waste when they deliver a new product. Local Authorities may also offer a 'bulky' electrical waste collection service from your household. Typically, these services have a charge, an example charge would be £20-30. To what extent would these charges influence your decision on whether or not to use these services?. Base (2000)

Likelihood of using different methods to get rid of unwanted electrical items...



Those in suburban (51%) and rural (52%) areas are significantly more likely to not use a service that involved paying high-street retailers to remove data from personal tech, in comparison to those in urban areas (39%).

Further, those in the South East however would be more likely to use this service in comparison to those in London (54% vs 34% respectively).

Those in suburban (67%) and rural areas (69%) are significantly more likely to put their postcode in a website to find out what to do with unwanted electricals compared with those in urban areas (59%).

Q11. Some ways to help people get rid of their unwanted electrical items are either already available or being considered. How likely or unlikely would you be to use this method, if it was available to you? Base (2000)



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.

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