

LES Consultation Qualitative Research Programme

Waste

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1. INTRODUCTION

Background

- As part of the publication of the London Environment Strategy (LES), a three month stakeholder and public consultation was conducted in the period August-November 2017
- The public consultation used the following methodologies:
 - Representative polling of 1,000 Londoners
 - Polling of the Talk London community (38,000 Londoners)
 - Online discussions with the Talk London community
 - Focus groups and interviews with small samples of the Talk London community

Objectives

- This research aims to explore Londoners' attitudes towards waste, with a specific focus on reuse and single use packaging
- The discussion guide was structured in the following way:
 - Background views on environmental challenges facing London
 - Background views on waste in London
 - Views on reuse and the circular economy
 - Views on single use packaging (coffee cups + water bottles)

Methodology

- In August 2017, the Opinion Research Team conducted 4 focus groups
 - The groups were split by age, as this was identified as a key driver of attitudes towards waste
- Participants were recruited from the Talk London community*, and were paid £40 to attend the session
 - At point of recruitment participants were told that the research was on the environment but were not told that the specific focus would be waste

*This method of recruitment results in a more engaged sample than would be the case in the general population. This sample were more **pro-recycling and civically engaged** that would be expected from the general population. Results should be read with this in mind.

Total sample size: 32										
Gender		Age		Ethnicity		Nationality		Housing tenure		
Women	Men	20-35	40-65	White	BAME	British	Other	Home-owner	Private renter	Social renter
17	15	15	17	26	6	25	7	14	15	3

Executive Summary

- Waste an emotive subject
 - Participants spoke in strong terms about landfill and plastic in the oceans, and said this motivated them to recycle
- London seen to have a worse waste problem than most peer cities
 - Waste seen as emblematic of wider challenges that London faces
- Inconsistency of recycling systems and lack of public recycling facilities seen as major barriers to good recycling behaviour
 - High levels of frustration around packaging and confusion over what can and can't be recycled
- Reuse a popular concept but one that faces major practical and cultural barriers
 - Barriers include difficulty of transporting bulky items, lack of skills for repairing broken items and convenient next day delivery
- Tackling single use packaging seen as a good starting point for changing London's waste culture
 - Low awareness of coffee cups as a major waste issue but support for action on this
 - High level of support for deposit return scheme to tackle waste from water bottles
- Participants want to see corporates taking greater action
 - Accept that consumers need to change behaviour but also feel that without change from businesses this will have limited impact

Implications for LES

1. Opportunity for the Mayor to take a leadership role

- Emerging findings suggest waste may be a top environmental issue for Londoners, and one that has implications for all Londoners
- Waste seen as an avoidable and solvable problem

2. Tackling 'headline' challenges will send a clear signal about commitment to changing London's waste culture

- Reducing the most visible forms of waste could bring wider benefits e.g. create traction for other waste/reuse initiatives
- Strong support for consistent recycling service across London

3. 'Unnecessary waste' such as single use packaging a popular area for change

- Resonates with frustration at packaging in general, but scale and scope of water bottle/ coffee cup waste not well known
- Perception that it is unrealistic to expect consumers to change means there is a preference for policies directed at Government/industry
- Support for solutions such as charging/ discounts- polling suggests that discounts are more popular whereas qual/behaviour change studies suggest charging will be more effective
- Spontaneous high level of interest in and support for deposit return scheme

2. LITERATURE REVIEW

Literature Review

- A review of existing research has been undertaken to inform the design of this research, and to provide context for the analysis of the results
- The review was not intended to be exhaustive, but has instead focused on the most relevant texts that provide key context to the research findings

Texts Reviewed

- Barriers to recycling for residents in flats and terraced properties in dense urban areas, Literature Review, WRAP (2015)
- Unpacking the household, University of Exeter (2013)
- A review of literature and research on public attitudes, perceptions and behaviour relating to manufactured, repaired and reused products, Report for the Centre for Remanufacturing and Reuse (2008)
- Consumer Attitudes to Food Waste and Food Packaging, WRAP (2013)
- Results of a field experiment to reduce coffee cup waste, Cardiff University (2017)
- Reuse in the UK and Ireland- a 'State of the Nations' report for the Chartered Institution of Wastes Management
- Keep Britain Tidy survey, 2017

Literature Review: Recycling

- Evidence that recycling habits are in large part shaped by social norms
 - Behaviours instinctive rather than conscious, and not necessarily correlated with environmental awareness/ knowledge
- Evidence that recycling behaviours are strongly correlated with situational factors e.g. easy availability of recycling facilities
 - This is particularly significant in the context of recycling in flats

- Barriers to recycling for residents in flats and terraced properties in dense urban areas, Literature Review, WRAP (2015)
- Unpacking the household, University of Exeter (2013)
- A review of literature and research on public attitudes, perceptions and behaviour relating to manufactured, repaired and reused products, Report for the Centre for Remanufacturing and Reuse (2008)

Literature Review: Reuse

- Evidence that price is the primary driver for engagement with the reuse market
 - Environmental concerns, whilst still present, are often not the driving force
 - Social attitudes play an important role in shaping reuse behaviour
 - Evidence that for some there is a stigma attached as reuse seen to be associated with poverty/lack of means
 - Whereas for others it can be a source of pride as it marks you out as a canny consumer who knows how to get a bargain
 - Attitudes vary significantly by item
 - Evidence that electrical items and white goods least likely to be second hand, followed by mattresses
- A review of literature and research on public attitudes, perceptions and behaviour relating to manufactured, repaired and reused products, Report for the Centre for Remanufacturing and Reuse (2008)
 - Reuse in the UK and Ireland- a 'State of the Nations' report for the Chartered Institution of Wastes Management

Literature Review: Water bottles

- Evidence suggests that lack of options for refilling water bottles may be a significant barrier to reuse:
 - 59% say they would be more likely to use a reusable water bottle if tap water refills were more freely available in places such as shops, airports and parks
 - 57% of people believe businesses that serve food and/or drinks should be required to provide free drinking water to the public, regardless of whether they are a customer or not
 - Only 25% of people know their rights when it comes to asking for a glass of tap water or filling reusable water bottle in public buildings and businesses
 - 71% of people are uncomfortable asking for free tap water in a glass without buying something else and 37% feel awkward asking for it in a reusable bottle even if they are making a purchase

- Keep Britain Tidy survey, 2017

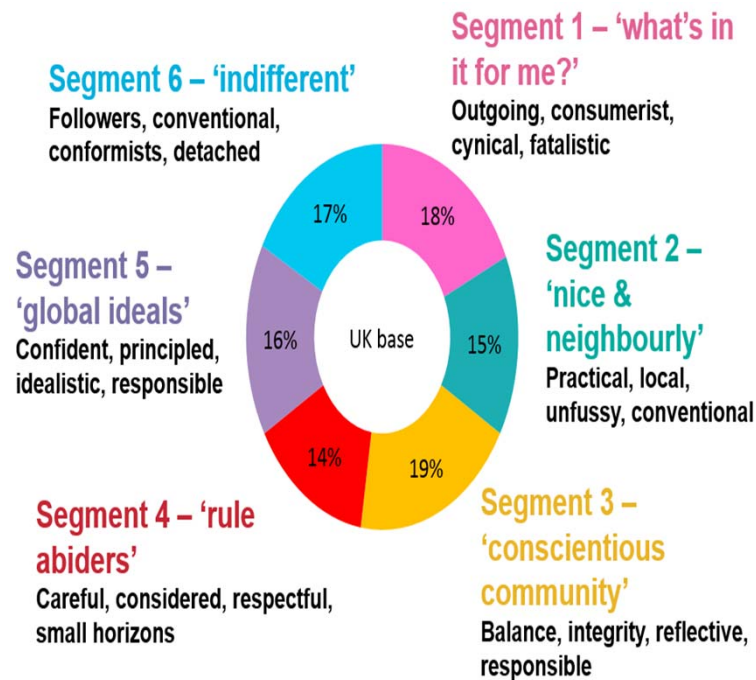
Literature Review: Coffee cups

- Evidence suggests that a charge on coffee cups is more effective than a discount
 - Results showed that an environmental message on its own can increase the use of reusable coffee cups by 2.3% and that having reusable alternatives available within the café can increase the use of reusable coffee cups a further 2.5%.
 - The distribution of free reusable coffee cups can increase their use by another 4.3%
 - While a discount on reusable cups did not make any difference for reusable cup sales, a charge on disposable cups increased the use of reusable coffee cups by 3.4%

- Results of a field experiment to reduce coffee cup waste, Cardiff University (2017)

Literature Review: Recycle for London segmentation

Segment overview

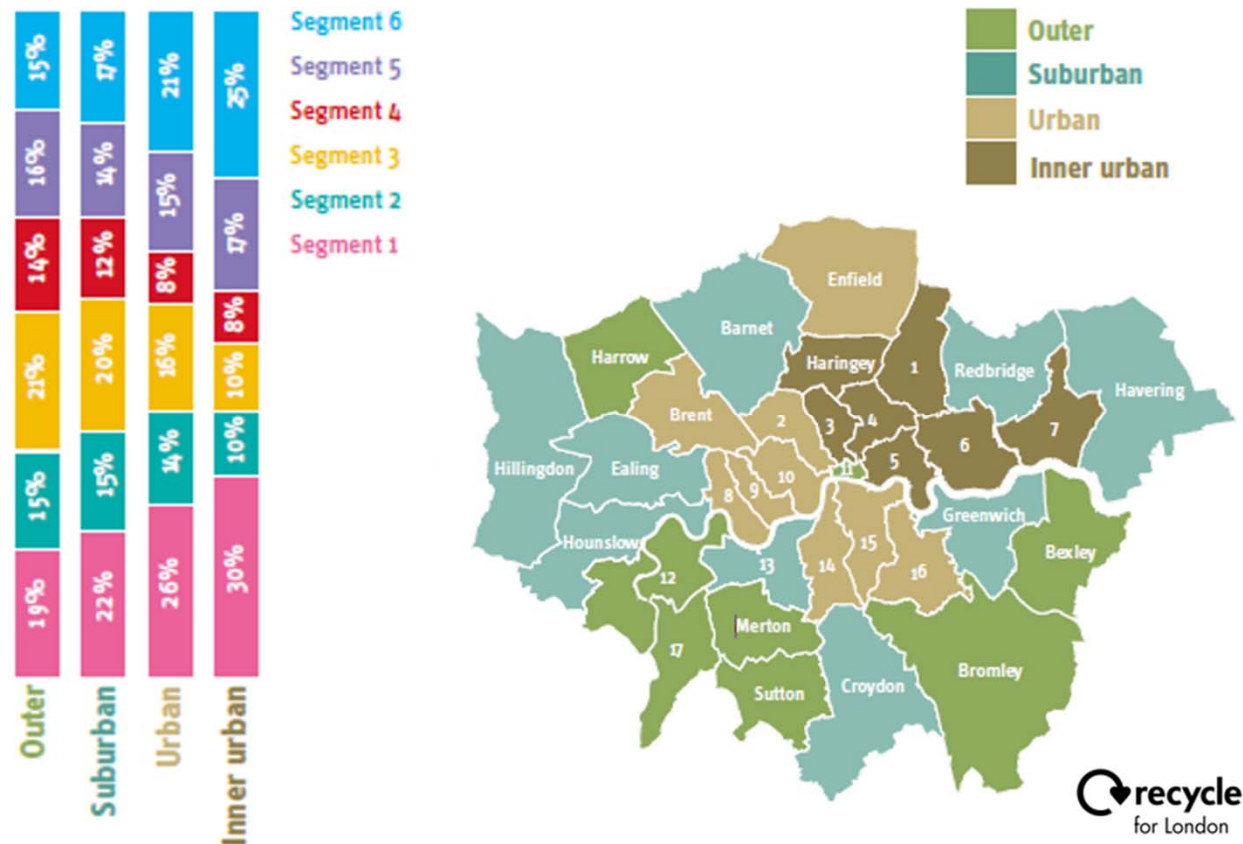


How is their recycling?

	Dry recyclate capture (derived from missed capture rate)	Food recycling participation (where available)	Contamination
Segment 1	6th of 6 ●○○○○○	5th of 6 ●●○○○○	6th of 6 ●○○○○○
Segment 2	4th of 6 ●●●○○○	4th of 6 ●●●○○○	2nd of 6 ●●●●○○
Segment 3	3rd of 6 ●●●○○○	3rd of 6 ●●●○○○	3rd of 6 ●●●○○○
Segment 4	2nd of 6 ●●●●○○	2nd of 6 ●●●●○○	1st of 6 ●●●●●○
Segment 5	1st of 6 ●●●●●○	1st of 6 ●●●●●○	4th of 6 ●●●○○○
Segment 6	5th of 6 ●●○○○○○	6th of 6 ●○○○○○	5th of 6 ●●○○○○○

Literature Review: Recycle for London segmentation

London segments profile



3. BACKGROUND VIEWS

Participants were highly engaged in environmental issues

- Concern that increasing population and rate of development is leading to a deterioration in London's environment
 - Concern highest amongst older participants, some of whom said this could be a reason for them choosing to leave the city in the future
- Air quality, waste and noise consistently identified as London's biggest environmental challenges
 - Air quality the most top of mind issue and, for older participants in particular, by far the most important
 - After AQ, issues which affect participants directly (particularly waste and noise) the ones they tended to feel most strongly about

"I have lived in London for 20 years and I don't envisage staying here when I retire and that's almost entirely down to the environment"

TL Member, 45-65 years

"I care about noise because it impacts on me personally."

TL Member, 45-65 years

Waste used as a barometer of the environmental health of the city

- Waste seen as emblematic of the city's wider challenges
 - **Pressures of growth:** Waste spoken of in connection to overcrowding, tourism and housing development
 - **Throwaway culture:** Fast pace of London life, along with emphasis on status, seen to encourage consumption and waste
- As such waste is used as a proxy for evaluating how well the city's environment is coping with the challenges it faces

"London is really fast paced and I think everyone feels really busy and competitive. As a city we're geared towards just buying and chucking things out."

TL Member, 20-34 years

"There's so many new developments in my area and fly-tipping has just gone through the roof."

TL Member, 20-34 years

Waste a very visible problem that provokes strong feelings

- Participants spoke of daily irritation of seeing waste and litter in London
 - Most frequently cited issues included fly-tipping, litter (free newspapers), bin provision and lack of recycling
- And of a sense of responsibility/ shame about waste in London
 - Seen as a problem that everyone is implicated in (unlike air quality which participants felt more detached from, particularly if they don't drive)
- Seen as an unnecessary problem
 - Light/noise pollution accepted by many as an inevitable part of life in a big city, whereas waste is seen as something that could and should be controlled

"There are so many fast food outlets now that on the train you are often knee deep in rubbish from people having eaten burgers or whatever."

TL Member, 20-34 years

"You are in a city so you expect noise. We've decided to live in London and there's some things you can't change. But you can recycle stuff and we can reduce waste."

TL Member, 40-65 years

London seen to be doing worse than other cities in how it manages waste

- Accepted that most major cities will have problems with waste, but in London it is seen to be particularly acute
 - Participants frequently compared London unfavourably to other UK, European or US cities (Bristol, Amsterdam, Frankfurt, New York)
- Recycling seen to be a weak area for London
 - Public recycling facilities and recycling in workplaces seen as poor compared to other cities
- As is corporate behaviour
 - Perception that businesses dump bin bags on the streets to avoid paying extra charges
 - Perception that food outlets do not do enough to promote recycling

"Compared to other European cities we don't recycle well. Very often if I'm in a park there's nowhere to recycle and you have to take the litter home."

TL Member, 40-65 years

"There should be a law that says that every coffee cup should provide a bin for recycling as well."

TL Member, 40-65 years

4. RECYCLING

Recycling is top of mind when discussing individual environmental impact

- Transport and waste seen as the main ways in which individuals contribute to the city's environmental challenges
 - When asked what actions they take to reduce impact on the city's environment, participants most commonly cited taking public transport and recycling*
- Seen as the two areas where individuals have most control over their impact

"A lot of people don't drive so they don't automatically assume they are adding to the air pollution. But every single person is creating some form of waste so if you actually want to make things better then that's the first place you start."

TL Member, 20-34 years

*Question asked prior to participants knowing the subject matter of the research

Recycling in the home seen as a well established social norm

- All participants said they recycle as much as their local authority allows
 - Including food and garden waste
- Concern for the environment drives behaviour
 - Many spoke of feeling upset at news stories of plastic in the ocean
 - Participants also showed strong dislike of the idea of waste going to landfill
- As do social norms
 - Recycling seen as on a par with good table manners i.e. part of your upbringing and something you don't think twice about

"I do it to stop the old planet drowning in filth."

TL Member, 40-65 years

"I feel like it was just drilled into me as a kid so I don't have to think constantly about recycling. It's just that what you do because everyone does it."

TL Member, 20-34 years

But there's no strong conviction that recycling has a major impact

- A minority expressed scepticism at to the impact of recycling
 - Attitude that air quality/ climate change are the major issues and recycling is not going to fix those- it is just 'fiddling at the edges'
- Many had doubts over integrity of the recycling system
 - Experiences of seeing different types of recycling mixed together increases suspicions
- Some concern that emphasis on recycling encourages irresponsible consumption
 - Some younger participants felt that amongst their age group an attitude of 'I can just recycle' means there is no thought given to reduce/ reuse

"My brother's point of view is that it's pointless to recycle because there's so many people driving Hummers in the States and why waste time faffing when it will have zero impact."

TL Member, 20-34 years

"Do you remember that news story about someone's magazine subscription in Islington that was found on an Indonesian landfill? They pretended to recycle it but the waste had been sold abroad because it's cheaper to dispose of it in poorer countries."

TL Member, 45-65 years

Recycling in home seen as easy to do, but difficult to do well

- For the most part participants felt it was easy to recycle in home
 - Participants tended to like whatever system of collection they were used to
- But many spoke of daily confusion over what can and can't be recycled
 - Common bug bears included plastic packaging and items with multiple parts

Multiple recycle bins



Created by Rob Davis from Noun Project

- ✓ Give added confidence in the effectiveness of the recycling system
- × Confusing if you're not used to them

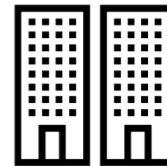
Single recycling bins



Created by user 54 from Noun Project

- ✓ Maximise convenience
- × Heightens concern over contamination
- × Heightens scepticism

Flats recycling



Created by Creative Stall from Noun Project

- × Recycling bins often full
- × Recycling bins often contaminated

Food recycling



Created by Yo kek from Noun Project

- × Limited space (especially in flats)
- × Attracts rodents/ foxes
- × Smelly

Inconsistency of service makes recycling more challenging

- Variation between boroughs both in terms of what is collected and how it is collected
 - Frustration at the disparity of service between boroughs, especially over garden/food waste collection
- Compounds the confusion that exists around recycling
 - Participants spoke of having to re-train themselves every time they moved
 - Sense that this makes it more difficult to know what can and can't be recycled (as it's assumed this might also differ between boroughs)

"It varies so much from borough to borough that it's ridiculous. I have friends who complain bitterly about their recycling because they get some tiny little box to put their food waste in whereas I get a big brown bin. There is no overall big picture that's true for everyone."

TL Member, 40-65 years

Outside of the home, recycling is seen to be much more difficult

- Social norms around recycling not seen to apply outside of the home
 - Lunchtime crowd identified as a major source of waste
- This is attributed to lack of facilities
 - Nearly all participants commented on lack of recycling bins in public areas
 - Compared unfavourably to other cities e.g. underground bin system in Amsterdam
- Participants spoke of having to go to extremes to ensure they recycle waste whilst out and about
 - E.g. by walking around until they found a recycling bin or taking rubbish home

"There's really not a lot of recycling in the city. If you walk down the street you'll potentially see a rubbish bin but you won't see a recycling bin most of the time. There are some councils that have started putting them in but it's not everywhere."

TL Member, 20-35 years

"I remember just the other day I had some rubbish and I wanted to find a recycling bin and I ended up walking around with it for ages. In the end I just took it home."

TL Member, 40-65 years

5. REUSE

Reuse a very popular concept

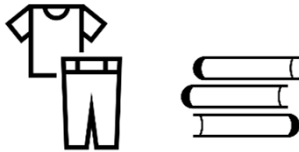
- Associated with 'old fashioned' values
 - Brings to mind post war frugality and 'making do'
- Seen to be very much out of step with modern economy, defined by:
 - Upgrading to latest model
 - Convenient home delivery
 - Products that are not made to last
- But an idea that has strong appeal
 - Resonates with irritation over 'unnecessary waste'

"My parents had a very frugal existence. You didn't waste anything and you only bought what you were going to use. We had very little waste."
TL Member, 20-34 years

"I have a perfectly good printer. There's a little plastic thing that you put your cartridge in that's broken. Can I get it fixed? No and I have to throw the whole thing away"
TL Member, 40-65 years

All participants engaged with the reuse market in some way

Clothes/ books



Created by asianson design
from Noun Project

- Donating more popular than buying
- Some expressed reservations over hygiene/quality of second hand clothes
- Noted that buying second hand books on Amazon can incur long travel and negate environmental benefit

Furniture



Created by Awesome
from Noun Project

- Either to get a bargain (younger participants) or to get high quality items (older participants)
- Several commented that modern IKEA style furniture not suitable for reuse due to poor quality
- Also comments that it is expensive to get furniture repaired and so things are often thrown out instead

Electrical items



Created by Learn Beards
from Noun Project

- Electrical items were also popular as seen to offer substantial savings/ gains
- But several expressed doubt that they would have the technical knowledge required to spot a good deal on second hand phones/computers

But they did not feel that London has a strong reuse culture

- Many anecdotes of friends/relatives who would never buy second hand
 - Opposition based on perceived stigma of buying second hand goods/ not having the latest model
- And participants felt there were significant practical barriers to reuse market in London
 - Lack of transportation for bulky items
 - Transient populations/ lack of community links
 - Modern products not made to last
 - Cheap and easy next day Amazon delivery hard to compete with

"I know a lot of people I work with wouldn't feel comfortable saying they were wearing a second hand coat."

TL Member, 20-34 years

"No one in London has a car so I think that makes this quite difficult."

TL Member, 40-65 years

"Things nowadays are made to be disposable. The price, the quality. They're not made to last."

TL Member, 20-34 years

Reuse is not primarily motivated by environmental concern

"If it's something like for £10 I'd rather just get it in store than to search around and wonder why is this person selling their kettle?"
TL Member, 20-34 years

Is there any other reason to do it...

- Reduces unnecessary waste
- Helps other people
- Fits with my ethos
- It's what everyone else does

Is it easy to do...

- Can I do it within my social networks?
- Do I have expertise to know if it's a good deal?
- Do I know where to go?
- Will it require transport?

What's in it for me...

- Get a good deal
- Earn some extra cash
- Buy something vintage/ antique
- Buy something I wouldn't otherwise have been able to afford



"If you've got this transactional life where you don't have time to get to know your neighbours and you don't spend enough time in one property then it's hard because you only trust people that you know."

TL Member, 20-34 years

Cost, time and effort significant barriers to engaging with reuse market

Financial Barriers

- × I wouldn't be able to sell it for very much
 - × I could get it for the same price if I bought it new
 - × I'm not confident it will be good quality
 - × It's expensive to get it repaired
- | | |
|---|-------------|
| { | Kettles |
| | Microwaves |
| | White goods |
| { | Furniture |
| | Electronics |

"Buying new stuff is more convenient. You just get Amazon next day delivery. It's much more effort to look for something second hand"

TL Member, 20-34 years

"If someone is selling a computer that's 2 or 3 years old how will I know they are being honest about why they are selling it?"

TL Member, 20-34 years

Practical Barriers

- × I don't know where to go
 - × It takes a long time to find a buyer/ to find the right item
 - × I don't have means of transportation
 - × No one will want it
 - × I don't know how to repair it
- | | |
|---|--------------------|
| { | Furniture |
| | Mattresses |
| | Underwear |
| | Bedding |
| | Broken electricals |

"I will always go for the easiest, least strenuous solution."

TL Member, 20-34 years

Participants had many examples of circular economy working well in London



- Charities that collect furniture from the home
- Repair and sell furniture
- Proceeds go towards a good cause



- Second hand shop in recycling centre
- Repair clinics
- Events in the community to teach how to reuse e.g. Give & Take day



- Give £5 vouchers for every bag of second hand clothes that you bring to a shop
- Voucher based on quantity not quality of cloth



- Online sites that connect people with a common interest in exchanging goods

- Many participants said that finding a service that will collect furniture for free is very difficult in London as most will only take things of good quality
- Emmaus and Trinity will repair items

- Several participants said they did not know where to go to in their local area to recycle bulky items or get items repaired
- Waltham Forest and Re-Start Project seen to offer services that are hard to find elsewhere in London

- Nearly all participants gave to charity shops but many said they didn't know what to do with bad quality clothes/ underwear
- This presented as a solution by one participant

- Most participants had heard of or used Freecycle but several felt that it can be a cumbersome process, especially if looking for a specific item
- Nextdoor mentioned by one participant as a more user friendly version of Freecycle

But also felt more could be done to make it easier for people to engage with reuse

Education	Community schemes	Incentives
<ul style="list-style-type: none">• Events/workshops around the community• Emphasis on teaching how to repair	<ul style="list-style-type: none">• Local 'Green champions' who promote & encourage reuse e.g. organising car pooling to go to recycling centres	<ul style="list-style-type: none">• US style 'consignment stores' where people are paid for items they bring in
<p><i>"My father's generation B&Q didn't exist so my dad used to keep screws and all this sort of thing. We don't live like that anymore."</i></p> <p>TL Member, 40-65</p>	<p><i>"I've actually charged my neighbours to pick up their large goods which they've left on their front garden or pavement. I have a van and I charge a fiver. There should be more of that."</i></p> <p>TL Member, 40-65</p>	<p><i>"Shops where middle class people take their nice suits and stuff and then when it was sold they would get most of the price and the shop would get commission. You could do that for lots of stuff."</i></p> <p>TL Member, 20-34 years</p>

Repair and restore centres the most popular idea

"Waltham Forest send me an email saying we are doing a 'Give and Take' event which means you can come and give things you don't need and if there is something that you want you can take it home. They do it at local libraries and other public spaces. That is one of the first things that got me really thinking about what I am doing with not wasting stuff at home."

TL Member, 40-65

"If you go to a recycling centre you will see people throwing away absolutely fantastic bits of stuff, whether that be furniture, a fridge etc because they just want a new model. What we haven't got is somewhere you can take perfectly good working things or things which are missing a little bit and just donate it to this big warehouse building and then they charge everyone a fiver or a tenner and it gets bought."

TL Member, 40-65

6. SINGLE USE PACKAGING*

*This section contains finding from a representative poll of 1,000 Londoners conducted in July 2017 by YouGov

Packaging felt to epitomize culture of 'unnecessary waste'

Too much packaging

- Online deliveries especially Amazon
- Fruit and vegetables in supermarkets
- Fast food packaging and cutlery

Packaging not recyclable

- Frustration at continued use of polystyrene and cellophane

Packaging confusing for consumers

- Variation and inconsistency in what can and can't be recycled

Government efforts seen to have stalled

- Continued use of plastic bags compared unfavourably to other countries e.g. Germany

"If you ever order anything from Amazon it comes in a huge box, even if it's just one USB."

TL Member, 20-35 years

"When I was in Germany recently you couldn't get plastic bags in the supermarkets. You had to get cloth bags."

TL Member, 40-65 years

Low spontaneous awareness of coffee cups as a waste issue

- Most unaware that coffee cups are not recyclable
 - Approx 2-3 participants in every group were aware of this
- Confusion over whether this was true of all or some
 - Some participants had seen coffee cup recycling points in London and wondered how these worked if cups are not recyclable
- Shock that this is the case
 - Some sense that the look and feel of coffee cups 'dupes' customers into thinking they are recyclable

"I am gobsmacked that that's the case."

TL Member, 20-34 years

"I've seen a dedicated recycle bin outside St Paul's. Is that just for show?"

TL Member, 20-34 years

"They put the sign on the lid to make you think the whole thing is recyclable. It's so clever."

TL Member, 20-34 years

Reusable cups not seen as mainstream

- Nearly all participants said they occasionally buy takeaway tea/coffee
 - Older participants tended to prefer sitting in a cafe rather than having it on the go
 - Young participants said they tried to avoid buying tea/ coffee due to high cost
- Reusable cups not felt to be common practice
 - A minority of participants had one but most of those said they tend to only use it at work/home rather than in retail outlets
- Many unaware that you could ask to get your own cup filled up at a retail outlet
 - Low awareness of discount schemes in retail outlets- even amongst those with reusable cups

"I have coffee out quite a lot but I would never dream of getting a takeaway cup. I like to sit and have it there. I am lucky because I have the time."

TL Member, 40-65 years

"It would be weird going in and saying 'can I have a latte in my flask'. It's a bit like 'look at me I'm so good.'"

TL Member, 20-35 years

Participants felt it was unrealistic to expect consumers to change behaviour

- Reusable cups not convenient
 - Easy to forget/ bulky to carry/ risk of spillage/ require cleaning
- Reusable cups not the norm
 - Concern they can make you stand out
 - Branded takeaway cups a status symbol, especially in corporate environment
- Habits around coffee/ tea consumption deeply ingrained
 - Part of automatic daily routine
 - Strong brand loyalty
- Current incentives encourage use of takeaway cups
 - Tax means it's more expensive to get a mug than a takeaway cup so everyone gets takeaway even if sitting in

"Frankly it's easier to pay 5p or 10p more than it is to carry a mug around"

TL Member, 40-65 years

"I think the firm that I work in 95% of people walk in with a hot drink from Pret or somewhere. I feel like it's a culture or a status thing. It's like saying 'I can afford to.'"

TL Member, 20-34 years

"People who sit inside the coffee shop still have the takeaway cup when they could have a mug. I think they charge you 10p more to eat in so people are too cheap to pay that."

TL Member, 20-34 years

Participants felt strongly that this requires change from government/ industry

- Support for retailers moving towards recyclable cups only
 - Some awareness that Costa Coffee has taken positive steps on this
 - One participant thought the City of London had imposed policy on restaurants in Epping Forest
- Assumption that industry doesn't do so because it would cost more to make recyclable cups
 - Participants did not think this cost should be passed onto consumers
- Expectation that this will only happen through government legislation
 - Assumption that this would be a relatively easy step for government to take

"If it costs more money why don't they just soak it up? I don't feel like Pret and Starbucks are struggling to make ends meet."

TL Member, 20-34 years

"That's a straightforward government issue. No brainer. They should not allow those shops to be selling coffee in those cups."

TL Member, 40-65 years

A charge on single use cups felt to be more effective than a discount

- Price of takeaway drink already 'costed in' to decision making
 - Participants argued that anyone who had already resolved to spend £2.50 was unlikely to change course due to a 25p discount
- By contrast an extra cost has not been and could have an impact on behaviour
 - Participants felt that the cost of takeaway hot drinks was already high enough that any extra cost would be noticed
- Plastic bag charge felt to set a clear precedent

"If someone spends £2 or £3 on a single coffee then 10p off isn't going to make a big difference to them."

TL Member, 20-35 years

"I think the carrier bag thing is a fantastic example of that. If you don't take them with you then you get charged and within months those numbers absolutely plummeted."

TL Member, 40-65 years

In the quant this was the other way around*:

- 48% of Londoners said that **discounts off the cost of coffee** would do the most to encourage them to use a reusable coffee cup compared to only 18% who said an **additional charge** would do the most

**Possible explanation might be that in a survey people are more likely to state their preference (i.e. I wouldn't want to pay more) whereas in a focus group setting participants have time to reflect more on what would be most effective (i.e. I wouldn't want to pay more and therefore this is more likely to change my behaviour)*

Bottled water not popular amongst participants

- Nearly all participants said they try to avoid buying bottled water
 - Many participants had reusable bottles and said they use them regularly
 - Many participants (particularly older) said they only drink water when at home/at work
- Most said this was due to 'common sense'
 - Attitude of 'why pay for something that you can get for free'
 - Perception that bottled water is a con
- Environmental concerns less prominent
 - Perception that bottled water only a problem if not recycled
 - A minority of participants aware of wider environmental costs of bottled water (travel/energy)

"I would say I don't think about the environment. I just feel annoyed that I'm wasting money."

TL Member, 20-34 years

"They can be quite easily recycled. They can be made into all sorts of stuff like T shirts and blankets."

TL Member, 40-65 years

- 19% of Londoners say they already use a reusable water bottle
- 61% of Londoners say that they would be likely to consider buying a reusable water bottle to reduce the amount of single use plastic bottles sold

But participants felt it was difficult to avoid bottled water entirely

- Participants spontaneously identified convenience as the main barrier to reusable water bottle use
 - Bottled water bought out of necessity e.g. when out and about and caught unawares (weekend) or when water consumption is constricted (airport/ concert)
 - Participants who had water bottles said they often forgot them/ didn't have space in their bag to carry them/ worried about water spilling/ found it a hassle to wash them
- Closely followed by health concerns
 - Reusing water bottles linked to cancer by nearly all participants
 - High level of uncertainty around long you can use a bottle for before it is dangerous
- Participants also identified cultural reasons for bottled water consumption
 - Bottled water used to impress in formal/ work environments
 - Younger participants in particular said they thought certain brands had become prestige/status symbol

"If you go to the O2 or Wembley you can't take in your own water. You have to buy water inside and it has to out of a plastic bottle."

TL Member, 20-34

"I think it's a status thing. Like if you go somewhere and they're trying to be nice to you or make you buy things they'll offer you a bottle of water. Never a glass of water but a bottle"

TL Member, 20-34

- Most common reason given in the quantitative for not buying a reusable water bottle is **concern about chemicals in the bottle**, followed by Londoners **saying they wouldn't use it enough** and that they **don't like carrying them around**

Strong spontaneous support for deposit return scheme

- Addresses what participants see as the key problem e.g. water bottles not being recycled
 - In every group idea came up spontaneously almost as soon as waste was discussed
- Many had seen examples of deposit return schemes working well elsewhere
 - Especially European participants who had grown up with such schemes
 - Older participants remembered schemes from when they were younger

“In the US and Germany and Norway and I’m sure a ton of other countries you pay a bottle deposit so if you buy a bottle of Coke you pay like \$0.05. You take that back to the store because you want to get your \$0.05 back and if you buy 40 water bottles it’s a few dollars so people actively take their bottles and do recycle them because it’s more advantageous to do than to literally throw money into the bin.”

TL Member, 20-35

Increasing places to fill up water bottle a popular idea but uncertainty around how big an impact it would have

- Participants felt it was difficult to find places to fill up water bottles in London
 - Lack of water fountains, particularly when compared to other cities
- But this was not a top of mind issue
 - Not spontaneously mentioned in any of the groups
- Participants were unsure how much of an influence this has over their water behaviour
 - Not spontaneously mentioned as a barrier in any of the groups
 - Most said they tended to fill up at home/work

"It's quite difficult in London and having just come back from New York it was much easier there to find places."

TL Member, 20-34 years

"I think it's a pointless drop in the ocean that might save one bottle in five hundred."

TL Member, 40-65 years

- In the quant **more places to fill up water bottles** (33%) and **more accessible places** (31%) were what would convince Londoners to use a re-usable water bottle

Using retail outlets to fill up water bottles not common practice

- Nearly all said they would not do this unless they had bought something
 - Some had stories of retail outlets refusing to serve tap water even when they were customers
- Concern that it would be taking advantage of the business
 - Likened to asking to use toilet facilities when not a customer
- And that it wouldn't be practical for businesses
 - Concern that in busy areas of London businesses could become overwhelmed with people requesting to have their bottles filled up

"If they are not going to let you use the toilet I find it quite unlikely they are going to let you fill up your water bottle."

TL Member, 40-65 years

"The potential impact on that business is just not practical. Can you imagine if all these cyclists turn up and pile into the restaurant?"

TL Member, 40-65 years

Participants said they were unlikely to use an app to see where they could fill up

- Getting water not something you want to put that much thought/ effort into
 - Getting out phone and searching on an app too time consuming when you could just go to nearest shop
 - Some said that signs in the window would work better
- An app would work best if it offered wider services
 - E.g. show other public amenities such as free ATMs, toilets etc
- Support for more places offering jugs of water
 - Sense that this is starting to happen more e.g. in theatres

"It's just a lot of effort. If I'm thirsty I'll just buy a bottle of water as opposed to actively going out of my way to get free water."

TL Member, 20-34 years

"Why can't more places have water in a jug? Quite a few theatres have started doing that and it's quite nice actually."

TL Member, 40-65 years

- In the quant 27% of Londoners said that **more information about where I can fill up** would be the most convincing reason to get a re-usable water bottle

Tackling single use packaging seen as a good starting point for changing London's waste culture

- Seen as a relatively small problem compared to other environmental issues e.g. air quality
- But one where it's possible to see that tangible progress could be made relatively easily
 - And one which would signify a wider shift in attitude towards waste
- Working with corporates seen as key
 - E.g. giving awards to companies which take positive action

"Water bottles and coffee cups resonates with me. It seems like quite a tangible thing to achieve. It's quite obvious if you've got a takeaway coffee cup or water bottle you could change that culture. It would be an effective visible change."

TL Member, 20-35 years

"The GLA could give awards to the best businesses in London. To encourage places like Pret a Manger to recycle. That would make a big business."

TL Member, 40-65 years