
THE ROLE OF BUSINESSES IN REDUCING SINGLE- USE PLASTICS

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1. EXECUTIVE SUMMARY

1.1. Introduction

With BRITA's longstanding commitment to offering consumers more sustainable alternatives to single-use plastic and supporting efforts to protect the marine and wider environment and Keep Britain Tidy's aspiration to end waste for now and future generations, there is a shared ambition to reduce waste from single-use plastics. BRITA UK and Keep Britain Tidy were therefore interested in understanding the role of businesses in encouraging and enabling positive behaviours around single-use-plastics in the workplace and in retail environments. In-depth research was carried out to explore this, as well as the role of employers in encouraging positive waste management behaviours at home.

1.2. Methodology

Following a desk review to identify the range of initiatives being used by businesses to reduce single-use plastics' consumption, and telephone interviews with businesses to explore their activity around single-use plastics, a survey was carried out with 1,006 employers across Britain. Respondents were senior decision-makers within private sector, small and medium businesses of 250 employees or fewer. Fieldwork took place in June 2019, using YouGov's Business Omnibus Service.

1.3. Results

Responsibility for reducing single-use plastics

53% of businesses feel they are responsible for reducing the use of single-use plastics within their business. This suggests that almost half of senior decision-makers (47%) do not see their business as being responsible for this.

Half of businesses (50%) believe they have a responsibility to encourage their staff to reduce their personal use of single-use plastics while at work, while 22% believe they have a responsibility to encourage staff to reduce their use of single-use plastics at home.

Less than a quarter of respondents (23%) think their business is responsible for encouraging their customers to reduce their use of single-use plastics.

Just over a fifth (22%) of businesses say they are responsible for being a leader in reducing single-use plastics and 73% indicated it is not their responsibility to share best practice in terms of plastic waste prevention with others in their sector.

Motivators to reducing single-use plastics

The strongest motivator for businesses to reduce their use of single-use plastics is concern for the impact of their business on the environment; 77% said this is a motivation for them. However, there remains one fifth (20%) of UK businesses who suggest they are 'not at all' motivated by this.

Improved reputation to customers, improved reputation internally, and cost savings in waste disposal are all similarly motivating for businesses to reduce their use of plastics, with 60% to 62% of businesses saying these factors motivate them to some extent.

Almost eight out of 10 (79%) businesses feel that their staff want to reduce their use of plastics to some extent, while 65% believe their industry want to do this and the same proportion believe their customers want to reduce their use of plastics.

Barriers to reducing single-use plastics

In terms of the factors preventing businesses from reducing their use of single-use plastics, or the challenges they face in doing this, finding suitable alternatives to plastic that have less impact on the environment, was the most prevalent. A quarter (26%) of businesses said this presents a challenge to a great extent and a further 39% said this is a challenge to some extent.

The cost of alternatives to single-use plastics is the second most prominent barrier, with 56% of businesses suggesting this presents a challenge for them in reducing their plastic waste. This is followed by identifying exactly where in the business and supply chain single-use plastics are used; 49% say this presents a challenge for them.

Current initiatives to reduce single-use plastics

Just over half (53%) of UK businesses feel they are eliminating single-use plastics from their business, to some extent. Almost a quarter (23%) say they are not doing this at all. When asked to rate their current level of action around single-use plastics, 52% of business said they are currently doing all they can to reduce single-use plastic waste; 41% feel they should be doing more.

Similarly, 53% of UK businesses feel that for any plastics they cannot eliminate, they are already doing as much as they can to make remaining plastics reusable recyclable, compostable and/or made from recycled materials. 36% of businesses said they should do more to do this.

1.4. Conclusion & Recommendations

Conclusion

This research has identified many positive changes businesses are making to reduce their use of single-use plastics, and that of their staff and customers. With the provision of reusables, elimination of plastics, and examples of awareness raising and engagement across sectors, there are many initiatives businesses can learn from and implement.

Whilst there remain challenges to tackling plastic waste within business, an average of 45% of businesses surveyed suggested these were not barriers preventing them from doing so. We therefore suggest that given the right support, infrastructure and education, businesses can work to overcome these challenges to reduce their reliance on single-use plastic and that of their staff and customers.

With 47% of businesses believing it is not their responsibility to reduce their use of plastics, 29% viewing the prevention of plastic waste as unimportant to their business, and 52% suggesting they are doing all they can to do reduce their plastic waste, we suggest it is vital that businesses, as a whole, do much more to address these issues. The positive changes many businesses are implementing are seemingly not being replicated across British business. Ultimately, business has a central role to play in tackling plastic waste and pollution, and there is some way to go in bringing this up in the agenda and taking action.

Recommendations

Given the findings from this research, a number of recommendations can be made for businesses to further reduce their reliance on, and production of, single-use plastics, and that of their staff and customers.

1. Firstly, it is recommended that businesses on the whole must take much greater responsibility and leadership in eliminating single-use plastics. Businesses have a vital role to play in demonstrating to their sector, staff, customers and suppliers

how changes can be implemented to drastically reduce single-use plastics. Aside from the urgent environmental need for this, it is also about sound business practices. It is broadly recognised that the fastest growing purchasing and employment decision influencer is the 'green' reputation of a business, and as such, businesses which do not recognise the need for greater responsibility and leadership are at risk of being left behind.

2. All 'quick wins' in terms of single-use plastics, where they can be eliminated, should be implemented. A number of examples of these (as identified during the desk review and developed during the co-design workshops) which we are calling on businesses to replicate at scale, are:
 - Eliminate single-use plastic cutlery from all retail and workplace sites, replacing with reusable alternatives. Where this is not possible (e.g. in the on-the-go food and drink retail) they should be replaced with wooden or compostable¹ cutlery.
 - Eliminate the sale and availability of single-use plastic drinking straws from all retail and workplace sites.
 - Provide staff with reusable water bottles and coffee cups
 - Ban plastic bottles and single-use coffee cups from workplaces, asking members of staff to commit to not bringing these items into the workplace. This should be implemented along with the availability of drinking water taps or fountains for staff to refill their reusable bottles.
 - Implement a 'safe to drink' message at water taps to encourage re-fill in retail and workplace environments.
 - Replace plastic milk bottles with glass bottle milk delivery service in workplaces.
 - Remove all single-use plastic bags from sale in retail environments, replacing with paper bags for loose items (e.g. vegetables) and the sale of reusable alternatives.
 - Utilise re-fill schemes for cleaning products in workplaces (e.g. Splosh, Ecover).
 - Remove cellophane wrapping from magazines and newspapers in retail environments and, where necessary, replacing this with compostable alternatives.
 - Replace single-use pens with pencils or refillable alternatives.
 - Ban the use of balloons and balloon releases.
3. Having implemented the 'quick wins', businesses should then look to make more innovative and systematic changes to further reduce their use of single-use plastics. A number of examples identified by the desk review and developed during the co-design session, are:
 - Running a staff engagement campaign to increase awareness of the issue of plastic waste.
 - Running a staff co-design session to develop ideas for targeted changes that can be implemented within their organisation.
 - Retailers to trial packaging-free product lines, asking customers to bring their own reusable containers where necessary.
 - Retailers to strongly incentivise the use of reusables in place of single-use

¹ Prior to use of compostable alternatives to single-use plastic, an assessment must be carried out to identify their environmental impact.

plastics (e.g. discount on purchase).

- Retailers to strongly incentivise the purchase of packaging-free items (e.g. sold at a lower price than packaged items).
 - Consider how staff can be incentivised to make plastic-free choices through adaptation of expenses policies (e.g. expenses not paid for certain single-use plastic items).
 - Consider how staff can be encouraged to make plastic-free choices through using a social good incentive (e.g. donation to charity).
 - Invest in research and innovation, partnering with universities for instance, for the development of new plastic-free solutions.
 - Look to encourage communal/homemade lunches in workplaces in place of shop-bought 'food-on-the-go'.
 - Work towards plastic free accreditations (e.g. Surfers Against Sewage Plastic Free status).
 - Hold waste and re-use workshops or events (e.g. lunch preparation workshops, upcycling plastics).
 - Trial the use of deposit-return schemes for reusable alternatives to single-use plastic items at closed events (e.g. sports games, concerts, festivals).
 - Assess how existing drinking water fountains can be made more salient and attractive to increase use.
 - Consider how frontline retail staff can provide waste reduction messages to staff (e.g. via an at-till message to ask "Have you remembered your reusable bag?").
 - Consider how the availability of plastic-free items can be emphasised in retail environments (e.g. plastic-free aisles and shelves).
4. Businesses should pilot and robustly monitor such initiatives to identify their effectiveness in encouraging staff and customers to reduce their use of single-use plastics. Effective interventions should then be assessed for potential scaling (e.g. across the organisation or more widely). Businesses should show leadership in their sector, and openly share outcomes, learnings and recommendations from such pilots for other businesses looking to replicate these changes.

2. INTRODUCTION

2.1. Background

With BRITA's longstanding commitment to offering consumers more sustainable alternatives to single-use plastic and supporting efforts to protect the marine and wider environment and Keep Britain Tidy's aspiration to end waste for now and future generations, there is a shared ambition to reduce waste from single-use plastics. BRITA UK and Keep Britain Tidy were therefore interested in understanding the role of businesses in encouraging and enabling positive behaviours around single-use-plastics in the workplace and in retail environments. In-depth research was carried out to explore this. The research also looked to explore the role of employers in encouraging positive waste management behaviours at home. Insights from the research, outlined in this report, was then used to co-design interventions which could be piloted by businesses.

2.2. Aim & objectives

The aim of the research was to understand the role of businesses in encouraging and enabling a reduction in single-use plastics in the workplace, retail environments, and in the home. The objectives of the research were to identify:

- motivators and barriers for reducing single-use plastics
- current initiatives businesses have in place to reduce single-use plastics
- the extent to which employers encourage their staff to engage in positive waste management behaviours at home
- recommendations for developing interventions which can be implemented by businesses and retailers
- use research findings to develop interventions which businesses can take forward for piloting

3. METHODOLOGY

3.1. Desk review

A desk-based review was first carried out of global case studies and literature to identify the range of initiatives being used by businesses to reduce single-use plastics' consumption and encourage recycling within office and retail environments. This review looked at a range of activities including provision of goods and supplies, education, recycling, refilling, discounts and other initiatives, for both staff and customers. Where possible, the review looked to identify any demonstration of impact and other results from these initiatives.

3.2. Interviews with businesses

Nine telephone interviews were carried out with businesses to explore the personal, social and environmental triggers and barriers around increasing uptake of reusable goods, reducing consumption of single use plastics and enabling their recycling. Businesses were recruited through an invitation to Keep Britain Tidy's and BRITA's business contacts in a range of sectors. The nine businesses to participate were:

- Anglian Water
- Bewleys
- BT
- Costa
- Debenhams
- Greggs
- Innocent Drinks
- Places for People
- Walgreens Boots Alliance

Interviews lasted approximately 30 minutes and took place throughout May 2019. They were recorded, transcribed, and analysed by Keep Britain Tidy.

3.3. National survey with businesses

Insights gathered from the interviews were then further explored and quantified through an online survey with 1,006 employers across Britain via YouGov's Business Omnibus Service. Survey respondents were senior decision-makers within private sector, small and medium businesses of 250 employees or fewer. Fieldwork took place in June 2019.

3.4. Co-designing solutions

Research insights were then used to develop a series of behaviour-change interventions to encourage staff and customers to reduce their use of single-use plastics in workplaces and retail environments.

Interventions were developed during a workshop which brought together sustainability leads from BRITA UK, Costa Coffee, Anglian Water, Football Association, and Places for People. The workshop was delivered by Keep Britain Tidy, and used an approach that takes participants through a tried and tested framework to develop and refine behaviour-change interventions for trialling. This process resulted in the development of a number of interventions, as outlined in Sections 4.7 and 4.8 of this report.

4. RESULTS

4.1. Responsibility for reducing single-use plastics

When asked to select their perceived responsibilities as a business in relation to single-use plastic prevention and recycling, 53% feel they are responsible for reducing the use of single-use plastics within their business. This suggests that almost half of senior decision-makers (47%) do not see their business as being responsible for this (figure 1).

This perceived responsibility to reduce single-use plastics is highest in both manufacturing and hospitality industries (both 64%) followed by retail (61%); it is lowest in real estate (34%), transportation and distribution (37%), medical and health services (42%) and education (42%).

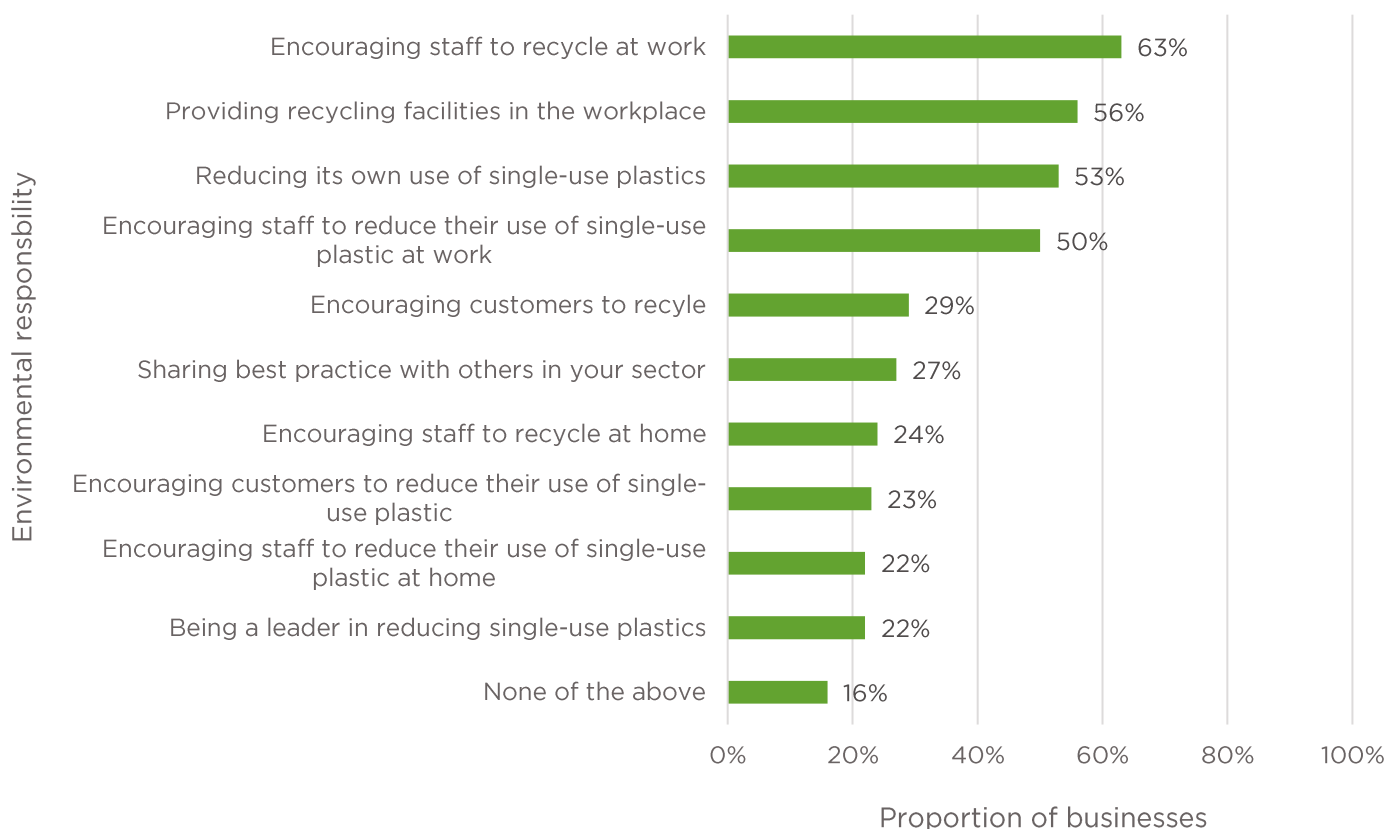
Half of businesses (50%) believe they have a responsibility to encourage their staff to reduce their personal use of single-use plastics while at work, while 22% believe they have a responsibility to encourage staff to reduce their use of single-use plastics at home.

Less than a quarter of respondents (23%) think their business is responsible for encouraging their customers to reduce their use of single-use plastics; this was highest in the retail industry (38%).

Perceived responsibility was highest for recycling; 63% say they are responsible for encouraging staff to recycle at work, and 56% say they are responsible for providing recycling facilities in the workplace. However, only 29% of businesses feel it is their responsibility to encourage customers to recycle.

More than one in 10 businesses (16%) feel that they are not responsible for any of the environmental actions outlined in figure 1 below.

Figure 1: Perceived responsibilities around single-use plastics and recycling



Base = 1006

In addition to this, just over a fifth (22%) of businesses say they are responsible for being a leader in reducing single-use plastics, showing how over three-quarters do not see this as their responsibility. Similarly, 73% of businesses surveyed indicated it is not their responsibility to share best practice in terms of plastic waste prevention with others in their sector.

Of the nine businesses interviewed, all agreed that they have a responsibility to reduce the amount of single-use plastics generated by their organisation. Many suggested this is an expectation (e.g. of staff, of customers) or is simply the 'right thing to do'. Others suggested plastic waste prevention is one part of their wider sustainability and climate change responsibilities and agenda.

"It's the right thing to do. Both colleagues and customers expect us to do it. We have a responsibility as a retailer."

"As a business that services and interacts with a lot of consumers, we have a responsibility to help people make good choices. Combating climate change, and as part of that looking at how we can reduce consumption, is for everybody to be a part of."

"We see our role as giving people the option to reduce their use of plastics; if they want to, they can. Where they can reduce, we want to support them, whether its reuse or refill, we look to encourage that."

"We have responsibility to do it, it's the right thing to do. And then there is customer demand for it, as well as the commercial element."

Some interview respondents discussed the importance and responsibility of their business being a leader in this field, and taking action against plastic ahead of legislation. These were typically some of the particularly large businesses interviewed, such as BT and Greggs.

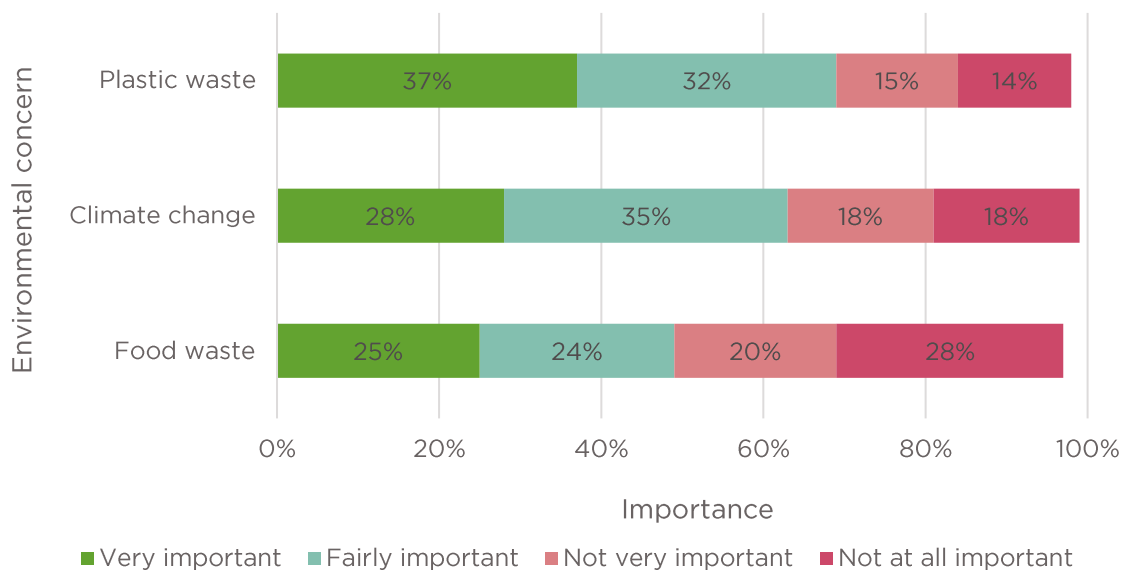
"Our role sits in a couple of places. We're a sizable business, so we could show some leadership, in terms of cutlery, straws etc.; demonstrate to other retailers what can be done."

"We have a Duty of Care to the environment and to our people. We strive to be leaders, coming up with new and innovative ways of doing things."

"We want to be responsible and do it ahead of regulation."

Survey respondents were asked how important it is to their business that certain environmental concerns are prevented, including plastic waste. Plastic waste was seen as the most important of the three environmental concerns presented; 69% of businesses view the prevention of this to be important, compared to 63% and 49% suggesting the prevention of climate change and food waste, respectively, are important to their business. Overall, the prevention of plastic waste is seen as unimportant to 29% of UK SME businesses (figure 2).

Figure 2: Importance of environmental issues to businesses



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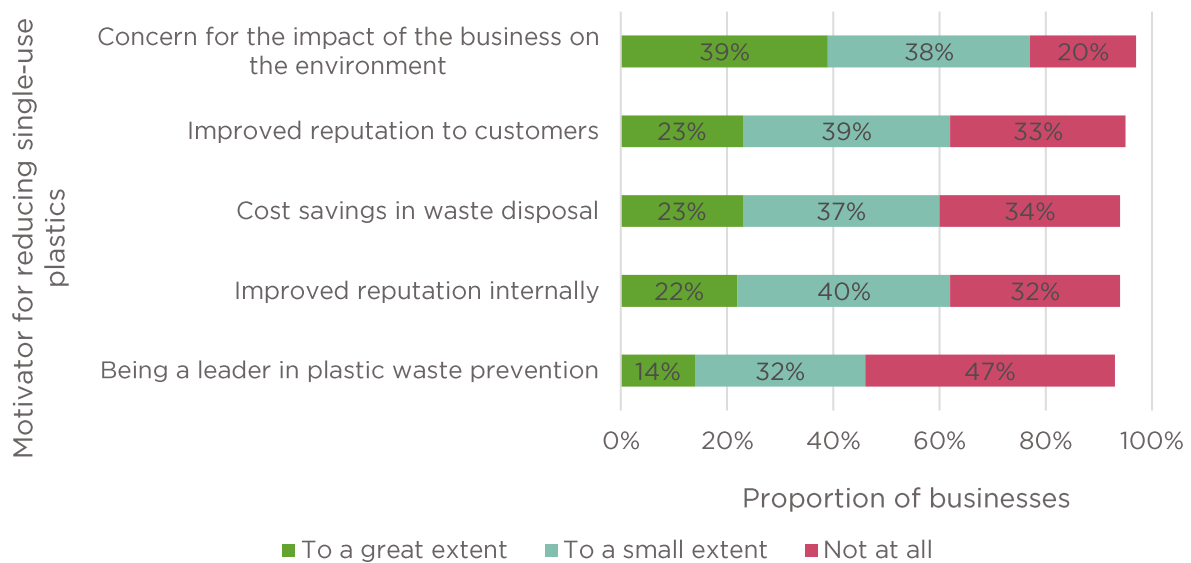
Here, there appears some differences in perceived responsibility to reduce plastic use between the SMEs surveyed, and the larger businesses who were interviewed. Although these two different data sets cannot be reliably compared, there is an indication that larger employers perhaps see themselves as having more of a responsibility to reduce the amount of single-use plastics they use, and those used by their customers and staff.

4.2. Motivators to reducing single-use plastics

The strongest motivator for businesses to reduce their use of single-use plastics is concern for the impact of their business on the environment; 77% said this is a motivation for them (figure 3). This was consistently the strongest motivation across all industry types, with the exception of transport and distribution, for whom cost savings in waste disposal is the greatest motivator.

The industries most motivated to reduce plastics by a concern for the impact on the environment are retail, legal, and medical and health services; 85% of respondents from these industries suggested this motivates them.

Figure 3: Motivators for businesses to reduce their use of single-use plastics



Base = 1006

These results are largely supported by the telephone interview findings, with all respondents discussing their concern for the impact of their business on the environment.

"We are concerned with the environment and the impact our business activities have on the environment. We want to leave the planet in a better place than we found it. There has to be a financial benefit, but financial impact is not the most important thing."

"I think we have a responsibility, as everyone does, to protect and preserve for future generations. Plastics is one element, one iconic symbol of that."

However, although concern for the environment is the strongest motivator to reduce the use of single-use plastics, there remains one fifth (20%) of UK businesses who suggest they are 'not at all' motivated by this.

Improved reputation to customers, improved reputation internally, and cost savings in waste disposal are all similarly motivating for businesses to reduce their use of plastics, with 60% to 62% of businesses saying these factors motivate them to some extent. Each of these were discussed during the interviews, to different extents by each of the businesses.

"We've had several clients who've come to us and said we want to be zero plastic by 2020, we want to be zero plastic by 2025, etc. We need to respond to that."

"We did some research on sustainability – it has moved up in the basic needs of the consumer."

"It's a real mix of doing the right thing and it needing to be cost neutral. For example, any discounts we give to customers for the use of reusables comes directly from our profits so it's a mix of commercial needs too."

Out of the factors presented to survey respondents, being a leader in plastic waste prevention was the least motivating for businesses to reduce their use of single-use plastics; 46% said this motivates their business to some extent. A number of interview respondents discussed this in different ways. Some suggested they want to be able to change now, ahead of regulation, while others suggested they are showing leadership in this space by becoming accredited and assessed on their environmental credentials.

“We are a responsible business, we want to keep that reputation and be seen as a leader.”

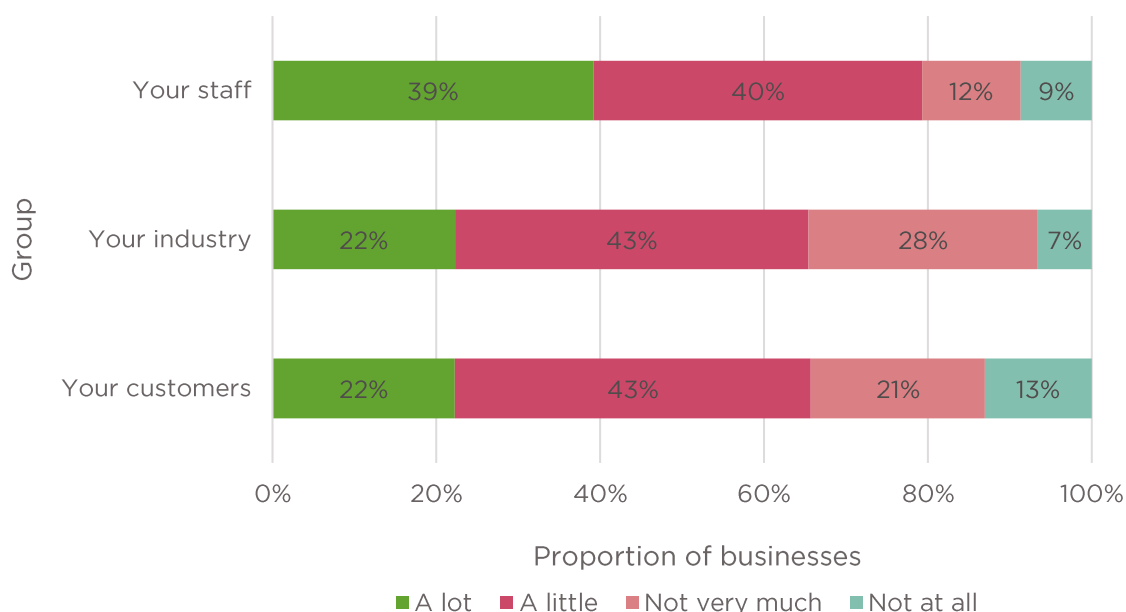
“We want to make sure we reduce our own impact. We’re conscious that government are looking at this in detail so we want to be responsible and do it ahead of regulation.”

“We’ve been certified as a ‘B Corp’ which is an accreditation for businesses, assessed against a programme and independently verified, looking at the legal core of our business and how we consider people and planet. It is the way we have always been, but now it is auditable and completely embedded in our values.”

Those driven by an ambition to show leadership in their sector were some of the larger employers (consulted in the depth interviews), suggesting there could be a disparity between SMEs and larger businesses in this regard.

Looking at how external pressure to reduce single-use plastics can be a motivation for businesses to take action, survey respondents were asked to what extent they believe their staff, their industry, and their customers want to reduce their use of single-use plastic. Almost eight out of 10 (79%) businesses feel that their staff want to reduce their use of plastics to some extent, while 65% believe their industry want to do this. The same proportion believe their customers want to reduce their use of plastics (figure 4).

Figure 4: Perceived appetite to reduce single-use plastics among different groups



Results exclude ‘don’t know’ responses. Bases: Staff = 894; Industry = 866; Customers = 762

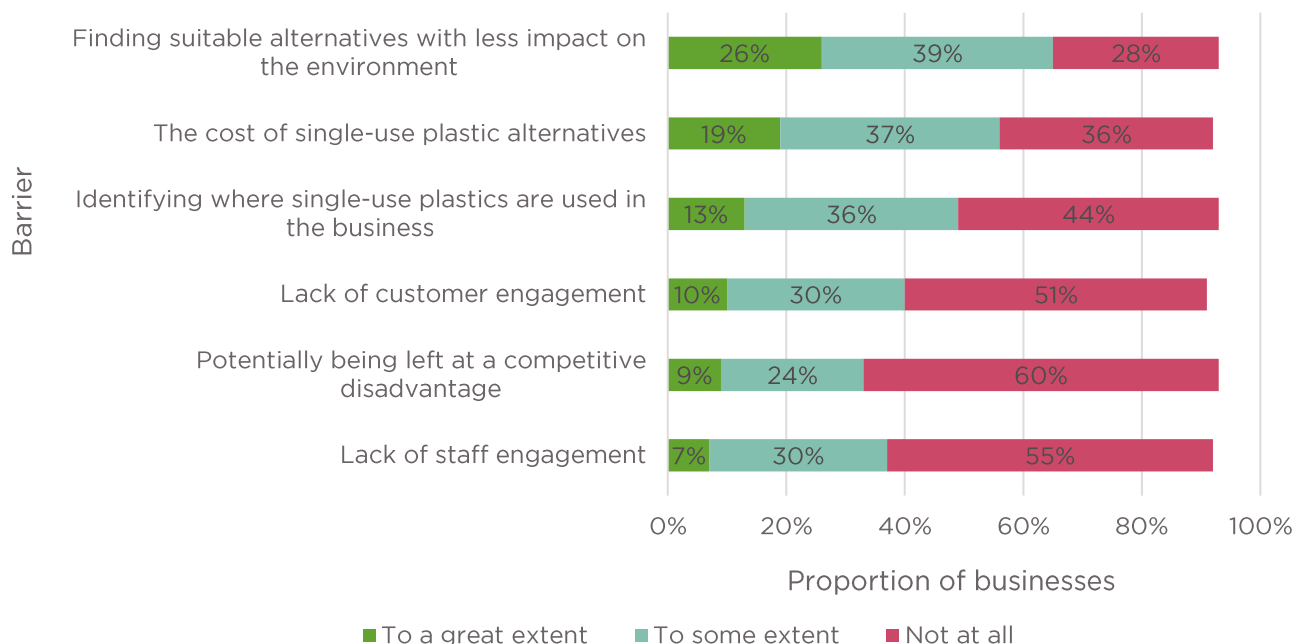
4.3. Barriers to reducing single-use plastics

In terms of the factors preventing businesses from reducing their use of single-use plastics, or the challenges they face in doing this, finding suitable alternatives to plastic that have less impact on the environment, was the most prevalent. A quarter (26%) of businesses said this presents a challenge to a great extent and a further 39% said this is a challenge to some extent (figure 5).

The cost of alternatives to single-use plastics is the second most prominent barrier, with 56% of businesses suggesting this presents a challenge for them in reducing their plastic waste. This is followed by identifying exactly where in the business and supply chain single-use plastics are used; 49% say this presents a challenge for them.

However, there remain large proportions of UK businesses for whom the factors shown in figure 5 do not present a challenge to reducing single-use plastic waste, as well as many businesses for whom the factors only present a challenge to some extent. It may therefore be the case that while these factors can be challenges to businesses, many do not see them as factors which *prevent* them from reduce their use of single-use plastics.

Figure 5: Barriers for businesses in reducing their use of single-use plastic



Base = 1006

Telephone interview findings largely support these results, with sourcing suitable alternatives to single-use plastics, and the cost of these, frequently discussed by businesses as being major challenges.

“Things like shrink wrap, for us is a challenge. We deliver a lot of pallets every year and you need to keep the items secure on the pallets.”

“In our labs there are lots of single-use plastics, like gloves, but it’s finding alternatives that do the job as well, and don’t allow contamination.”

“Alternatives to plastic have a cost. We made ceramic cups, cutlery and plates available to staff in the canteens [instead of

single-use plastic]. You have to make this cost equivalent and make sure replacements are durable. It's difficult."

When discussing the challenge of sourcing alternatives to plastics, it was highlighted by a number of interview respondents how there are often instances where single-use plastic is the most appropriate material for the job, when all things are considered. For example, using single-use plastic to extend the shelf life of food, and therefore prevent food waste, was discussed, along with protecting products in transit. One business also discussed how they have concluded, as an organisation, that packaging their product using single-use plastic bottles is actually the most environmentally beneficial method. This business suggested they are instead focusing on ensuring the single-use plastic they use is recyclable and made from non-virgin material, as much as possible.

"We have to be mindful of the fact that plastic is often used to protect products in terms of transport, or protect products in terms of shelf life."

"For us, we're clear that the biggest issue we face is climate change, and the most climate efficient way of us packaging our product is using single-use plastic. We've been buying recycled packaging for our bottles for years, and that is our goal; to ensure our packaging contains no virgin plastic from oil, and is fully recyclable, by 2022. We believe building a circular economy is priority, ensuring there is an end market for the materials we're producing."

"There is the issue of plastic demonisation. The greater issue of climate change is perhaps lost with a lot of people in this fight against plastic. It's about communicating when plastic is sometimes the most sustainable option."

As with 40% of survey respondents, interviewees also discussed the challenges in changing customer behaviour, engaging them in the communications around single-use plastics, and interrupting well engrained habits.

"You can tell people not to buy certain things, but actually when purchases or behaviours are a habit, that requires a whole different level of communication and engagement to try and break those habits."

"People aren't consciously buying bottled water going "I'm picking up a bottle of water that's going to possibly end up in the ocean and pollute a load of marine life", people aren't consciously thinking that. They're just thinking "I'm thirsty I'm going to get a bottle of water because that's what I've always done"."

For a couple of interview respondents, discussing implementing change among staff, it is dependent on the types of single-use plastic being targeted. It was suggested that it is difficult to influence the plastics brought to workplaces, such as at lunchtimes.

"People [staff] buy lunch, often in plastic, but you can't influence that. You can't really change what they bring into the office."

A barrier for some businesses in tackling their single-use plastic waste is in the complexity of their operations and processes. For instance, some large organisations discussed the need to ensure any operational, staff focused changes are implemented consistently across a large number of sites, and engaging a large number of staff in doing this. Others discussed how seemingly simple changes relating to use of plastics are often complex and require a large amount of work. It was also discussed how implementing change can often take time, such as changing contracts and suppliers.

“The challenge is getting consistency across 3,000 stores; using the same system and getting the message across to all staff”

“I’m learning that every stone you turn over there’s about ten other questions underneath.”

“That’s my biggest challenge – a lot of these questions aren’t yes or no answers, they’re not simple, they require a bit of work behind the scenes to get the systems going.”

“Contracts last for a number of years, it can be difficult to change things mid-contract.”

Finally, a number of interview respondents discussed the need for collaboration and holistic change within and across industries, as well support from government, in order to sufficiently begin to tackle the issue of single-use plastic waste and pollution.

“It’s really taking a holistic and integrated view on how we as an industry, you know as a food and drink industry, can tackle this.”

“The business community must come together and be collaborative more so now than we have been. I can’t believe that the top ten retailers aren’t speaking to the top ten suppliers. How do we share knowledge (and) innovation? We are part of a community who need to tackle this.”

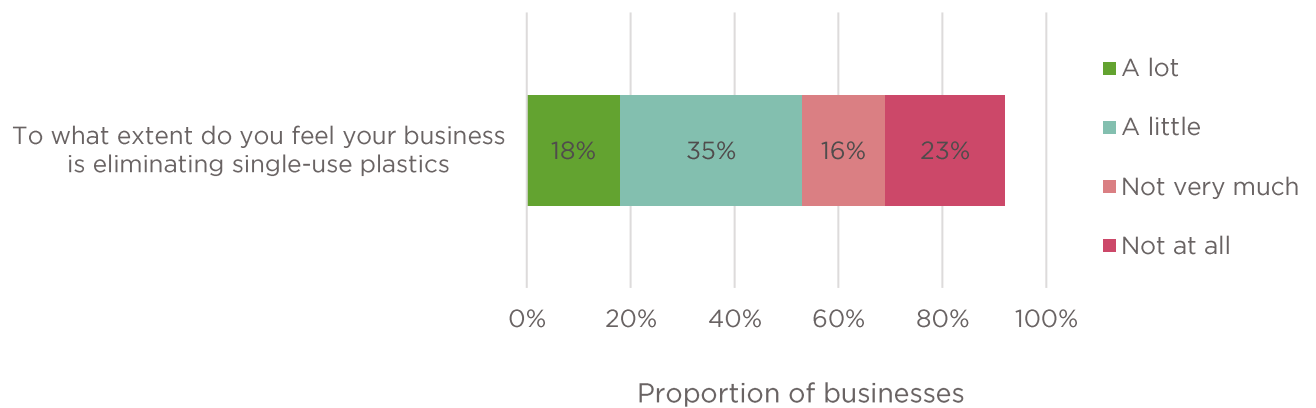
“The legislative landscape needs to change to help us. The waste industry is very disjointed. You ask two waste providers a question and you get two different answers. We need consistency to help us. We need legislation to drive some of the messaging.”

4.4. Current initiatives to reduce single-use plastics

Overall action around plastics

Overall, just over half (53%) of UK businesses feel they are eliminating single-use plastics from their business, to some extent. Almost a quarter (23%) say they are not doing this at all (figure 6). Furthermore, when presented with a list of pro-environment activities around plastic waste prevention (figures 9 to 11), 43% of businesses had not implemented any of this activity in the past 12 months. This finding was not reflected in the interviews carried out with large businesses, with all nine having implemented some of this activity. This suggests SMEs could potentially be slower to adapt to making changes with regard to plastic waste prevention, although further research would be required to fully understand this.

Figure 6: Extent to which business are eliminating single-use plastics



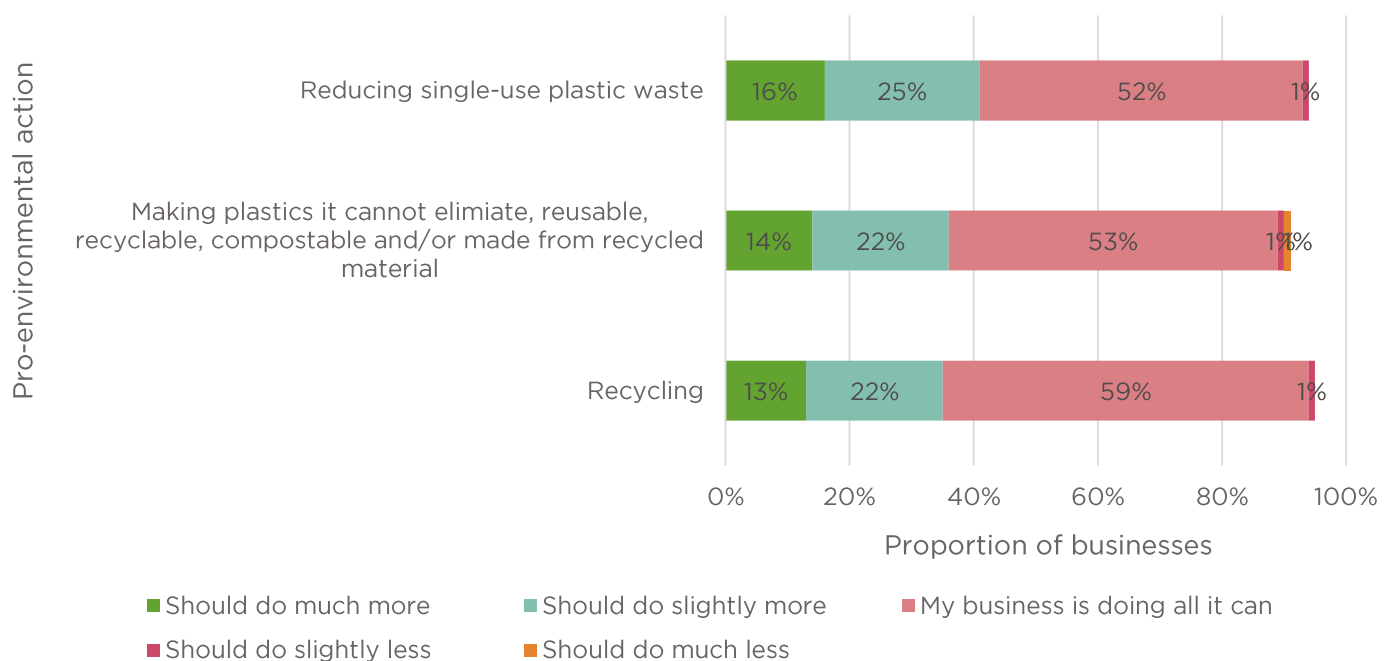
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When asked to rate their current level of action around single-use plastics, 52% of business said they are currently doing all they can to reduce single-use plastic waste; 41% feel they should be doing more (figure 7).

Similarly, 53% of UK businesses feel that for any plastics they cannot eliminate, they are already doing as much as they can to make remaining plastics reusable recyclable, compostable and/or made from recycled materials. 36% of businesses said they should do more to do this.

In terms of recycling, 59% of business say they are doing enough to recycle the waste they generate, with 35% saying they should do this more.

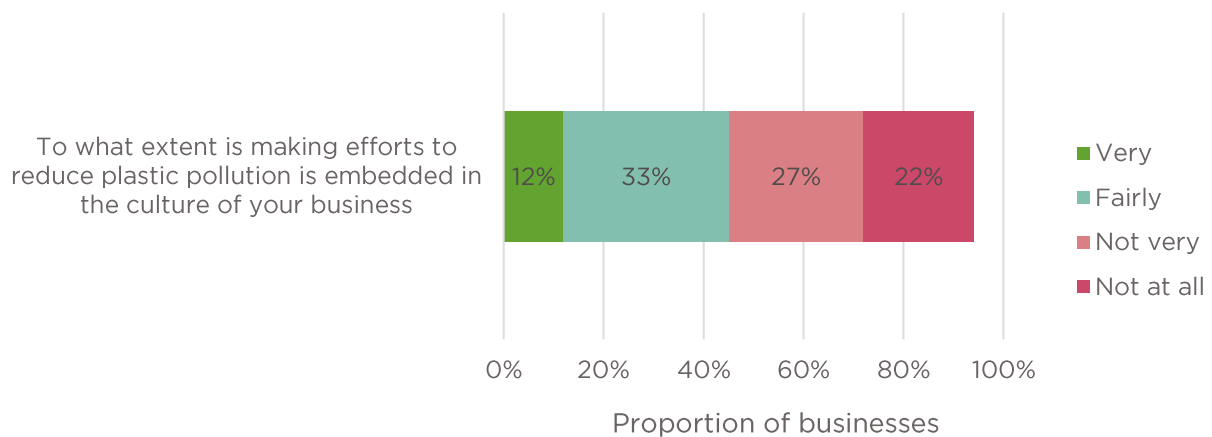
Figure 7: Level of pro-environmental action among businesses



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In addition to this, survey respondents were asked to rate the extent to which making efforts to prevent plastic pollution is embedded within the culture of their business. 45% of businesses felt this is embedded in their culture, to some extent, while 49% felt it is not (figure 8).

Figure 8: Extent to which plastic prevention is embedded into the culture of businesses



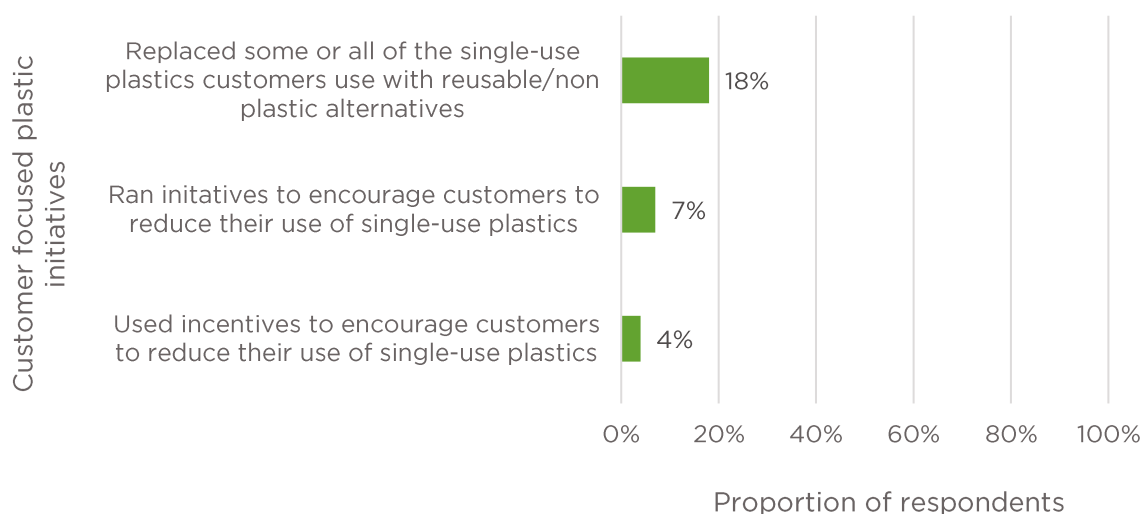
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Customer focused initiatives

Survey respondents were asked to identify which specific initiatives their business has implemented over the past 12 months with regard to single-use plastics. In terms of customer focused initiatives, 18% of businesses have replaced some or all of the single-use plastic customers use with reusable or non-plastic alternatives (figure 9). This was significantly higher in retail (29%), hospitality and leisure (29%), and manufacturing (23%) industries.

Only 7% of businesses overall have ran initiatives to *encourage* customers reduce their personal use of single-use plastics, in the past 12 months. This was slightly higher in businesses with the transport and distribution (12%) and retail (10%) industries. 4% of businesses overall have used incentives to encourage customers to reduce their use of single-use plastics.

Figure 9: Proportion of businesses implementing customer focused plastics initiatives in the past 12 months



Base = 1006

When discussing customer-focused initiatives, interview respondents highlighted many initiatives, trials, and changes they have made, or are in the process of making, around this. Many of these are, or were, small scale trials (e.g. at a small number of retail stores) which have the potential to be scaled across all sites. Others discussed straightforward swaps or eliminations of single-use plastic that customers use at their sites or stores.

“What we’re trying to do is look at where customers can receive their product in reusable containers. With deodorants for instance, we’ve launched a trial where it gets delivered to you in a reusable container, you send it back empty, then you get it cleaned and returned to you filled again – a closed loop. It’s currently being trialled. We hope each of the containers will last for at least one hundred uses.”

“We’re also paying for research around the Deposit Return Scheme and have four machines in Newcastle where cans and bottles get crushed and you can get 20p back for depositing them – it’s being experimented in some of our stores.”

“We removed straws and napkins from counters, so people can have them if they ask for them. That’s resulted in a significant drop in use.”

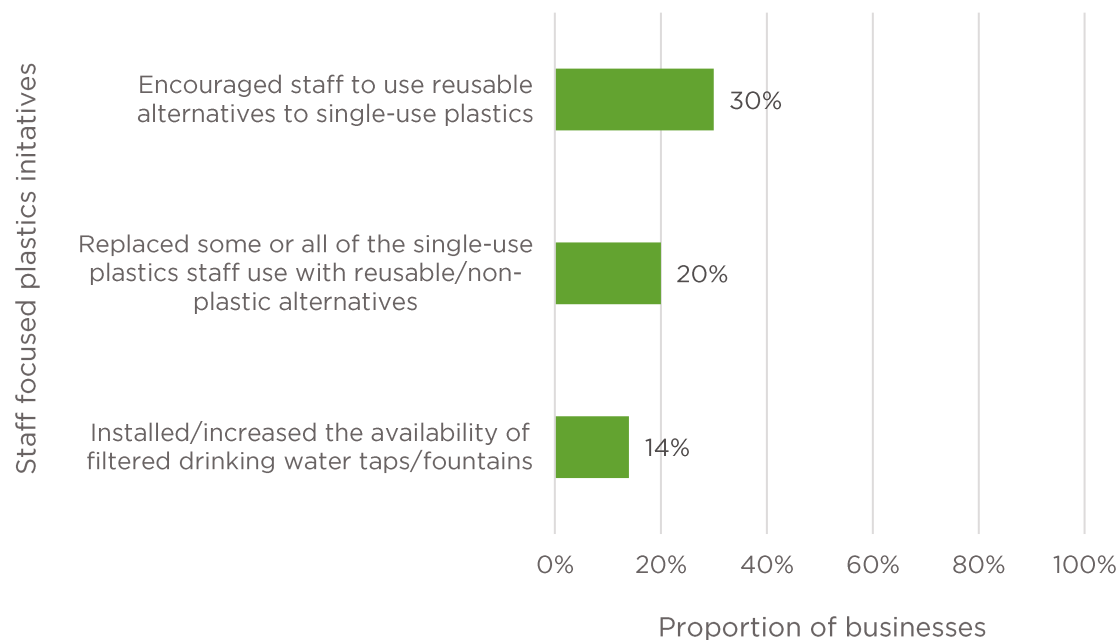
“We have trialled the removal of single-use plastics [plastic cutlery, plastic bags, plastic handling sheets for food] in a number of stores with a full launch of that coming in the second half of this year. It will prevent 300 tonnes of plastic waste each year from our stores.”

Staff focused initiatives

When asked to identify the staff-focused initiatives they have implemented in the past 12 months, 30% of businesses have encouraged their staff to use reusable alternatives to single-use plastics (figure 10). This was highest in the media and marketing (41%) and manufacturing (36%) industries.

One fifth of UK businesses have replaced some or all the single-use plastics staff use with reusable or non-plastic alternatives, and 14% have installed or increased the availability of filtered water drinking taps or fountains. The installation of filtered water taps was highest among businesses within education (24%) and medical and health services (23%).

Figure 10: Proportion of businesses the implement staff focused plastics initiatives in the past 12 months



Base = 1006

Many of the staff focused initiatives discussed by interview respondents were focused on the provision of reusables to staff, such as reusable coffee cups and water bottles, and straightforward swaps that have been made from single-use plastics to non-plastic or reusable alternatives. Others discussed awareness raising activities through internal communications or campaigns around the issues of plastics and ways they can be prevented.

"We've issued all of our team with a reusable coffee cup, so everybody got one of those probably about 18-months, two years ago, and then we banned disposable cups in our offices."

"At all of our water fountains, single-use plastic cups have been replaced with paper cones."

"We have a company meeting every Monday where we (the sustainability team) have regular slots as to share our own sustainable messages internally."

"We made ceramic cups, cutlery and plates available to staff in the canteens [instead of single-use plastic]."

Other businesses discussed initiatives with a slightly higher level of engagement with staff, such as events, pledges, and methods of internal social influence.

"We ran the 'let's get drastic about plastic' campaign for us all to take action against plastic. We invited employees to sign up to a plastic pact, making some kind of commitment at either home or work. Four and a half thousand staff signed up to it. We will now be highlighting a number of the ideas from the pact to staff over the course of the next few months, as tips for things they can do."

“The Bewley’s For Good group, which is our group implementing our sustainability strategy at all different levels of our organisation, is going to be all about what members of this group can do in their individual roles and in the offices where they work, to influence behaviour change and act as bit of an agent for change.”

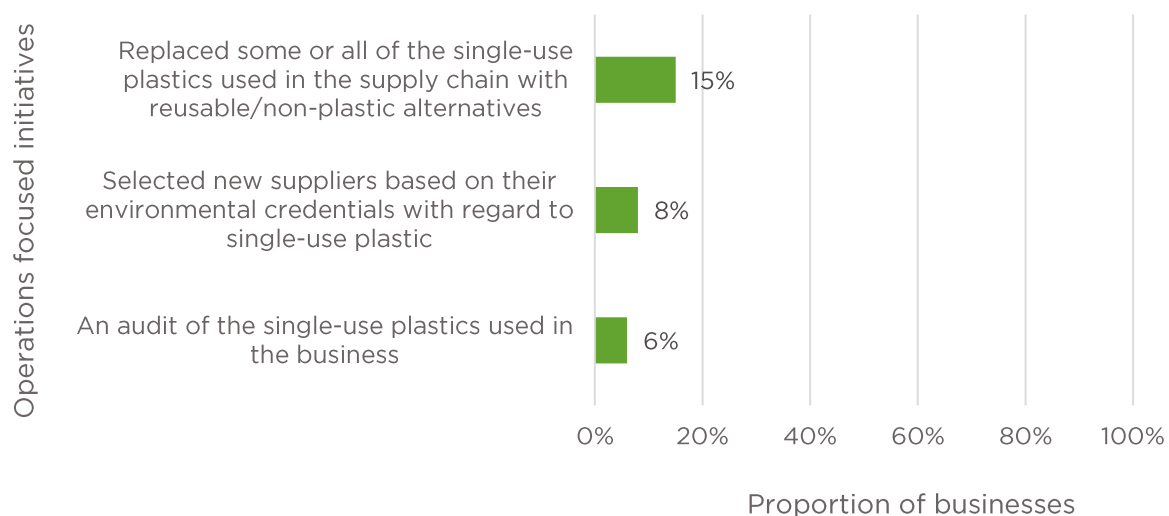
“We do a lot of staff engagement in terms of a pledge to lead a sustainable life, both in the office and at home, as well as education.”

Plastics in operations initiatives

Looking at other initiatives businesses have implemented across processes and operations, 15% have replaced some or all of the single-use plastics used in their supply chain with reusable or non-plastic alternatives (figure 11). This increases to 25% in the retail sector and 22% in manufacturing.

Less than one in 10 (8%) businesses have selected new suppliers based on their environmental credentials with regard to single-use plastic, and 6% have carried out an audit of the plastics used in their business in the past 12 months.

Figure 11: Proportion of businesses to implement operational changes with regard to single-use plastics in the past 12 months



Base = 1006

Interview respondents, again, discussed the simple replacements they have made in their processes, moving from single-use plastic to either a non-plastic or reusable alternative, or something that uses less plastic. Others talked about implementing plastic strategies and carrying out audits of where in the business and supply chain they are generating plastic waste. A number of respondents discussed the importance of having a plastics policy, or ensuring plastics is an element of any existing sustainability policy.

“In our cafés we moved from milk bottles to milk pouches years ago to reduce the amount of plastic used.”

“We’ve done a lot on our carbon footprint and emissions, identifying where it is along our value and supply chain, so we’re now working on doing this for plastic.”

"We pulled together a plastic strategy steering group a year ago for World Oceans Day. It has four strands – 1) to understand the scale of the problem, 2) to develop a coalition to work together on this, 3) working with customers, and 4) eliminating single use plastic water internally and in our supply chain."

"If we were working with a bottled water supplier who didn't have recycled PET, has no interest in putting recycled PET in to their bottles or talking to consumers about single-use plastic, then we probably wouldn't be working with them. It starts to inform our decisions on the suppliers we work with."

"We have recently pulled together a new 'strategic waste project team' of staff from across the business. We are looking at waste, cost, impact on customers, bringing in supply chain partners, social values, what can be re-used from our different schemes and estates."

"The biggest thing to do is have a policy, to have it down in writing, so people know what action you are wanting to take."

Recycling initiatives

As outlined earlier in the report (figure 1) perceived responsibility of businesses to take action around plastic waste and recycling was highest for 'encouraging staff to recycle at work', with 60% of businesses suggesting they are responsible for doing this. 56% of businesses feel they are responsible for providing recycling facilities, and 29% suggest they are responsible for encouraging customers to recycle.

These results were somewhat reflected in the interview findings, with a number of interview respondents suggesting their business currently or traditionally has had a greater focus on recycling than waste prevention. Retailers discussed the availability of customer facing recycling (e.g. in stores), but the need for awareness of the availability of these to increase and issues with contamination. Others discussed recycling engagement initiatives in the workplace and how these behaviours are often well engrained in employees, as well the specific systems in place to recycle waste produce by the business.

"We run the bring back scheme for cups, where customers can return any cup to any of our stores to be recycled. 20 million cups were recycled through the scheme across all stores in 18/19. We don't really advertise it, but have received so many, but we are trying to increase awareness of its availability."

"Our focus is on the recycle message currently, but looking at the waste hierarchy we want to increase our focus on re-use, so our activity is now how can we focus on this."

"We absolutely encourage recycling in our stores. We partnered with the Salvation Army to recycle and reuse faulty or damaged goods. We collect and donate clothing, textiles and electricals."

"We celebrate Recycle Week each year, we have a big engagement each September to all staff. We run a film, monitor recycling waste, etc."

“Things like our coffee sacks, when coffee comes in from the countries where we source, it comes in hessian sacks, and those sacks are collected in Huddersfield by a company who turn that into carpet underlay and pipe lagging.”

Effectiveness of initiatives

During telephone interviews, businesses were asked to comment on the success of their customer facing, staff facing, and operational initiatives relating to single-use plastic waste; how success was measured, what were the outcomes of this, and what learnings were made for improving the effectiveness of these initiatives in future. Firstly, a number of respondents discussed the need to communicate about this topic in a positive way, to both staff and customers, in order to increase engagement. Others suggested positive, pro-environmental behaviours around plastics need to become normalised, rather than highlighting those people who are doing the wrong thing.

“Because of some of the brands we have, which have got quite a tongue-in-cheek tone of voice anyway, we can do it in a non-preachy way.”

“What worked well was the language we used. It wasn’t preachy or negative or doom mongering, not telling people what they shouldn’t do. You need to make it positive, light hearted.”

“It’s sharing facts and information in a way that resonates with people that’s not too shouty or preachy, but it makes people feel that well, actually there is something I can do.”

“I think it’s more about normalising behaviour as opposed to telling people off for doing what is perceived to be the wrong thing.”

Specifically discussing initiatives aimed at reducing customer use of single-use plastics, a couple of interview respondents discussed the importance of presenting information and opportunity to customers and clients, without limiting their choice, but allowing them to make a more pro-environmental decision. This was linked to the suggestion of ensuring communications are positive and encouraging.

“We’re not forcing people down a route, but we’re presenting people with facts to make an informed decision. We’ve had really good feedback on that.”

“Convenience is number one for customers... we need apply that convenience we have catered for in our coffee to re-use and recycling.”

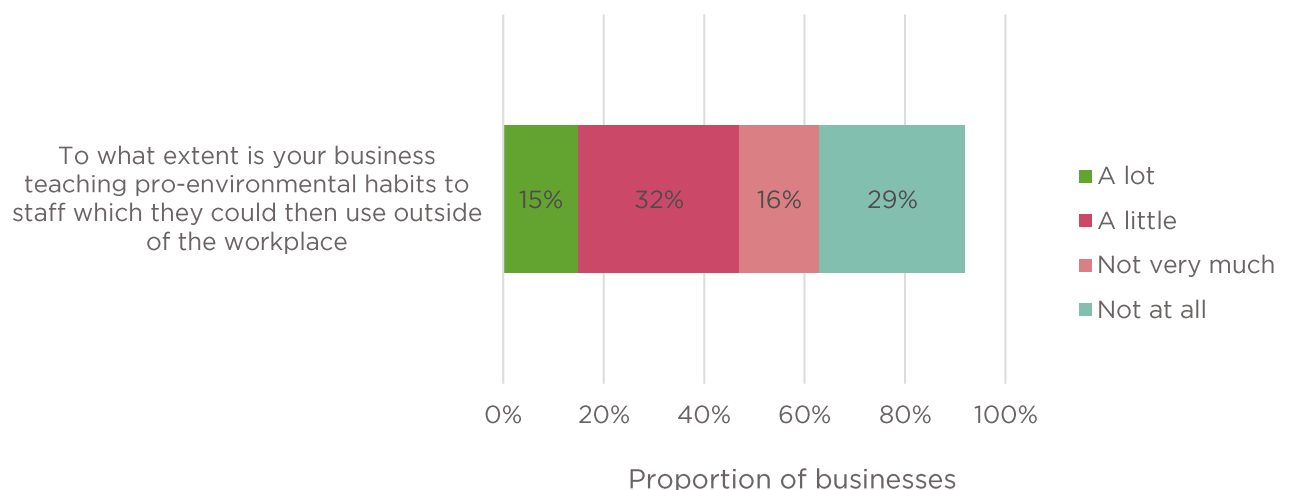
When discussing the measurable impacts of these initiatives, many businesses suggested the changes they have implemented are often very difficult to measure. Where single-use plastic has been eliminated from the business entirely, this can be easily calculated in terms of tonnes diverted from landfill. However, customer and employee awareness, for instance, is seen as being more difficult to identify. In addition to this, where businesses have seen an uptake on use of reusables, such as use of reusable coffee cups in cafés, this is often an increase from a very low baseline and is therefore difficult to make a reliable comparison.

“Our reuse has increased but it’s still small. It’s about 5 or 6% of customers using reusable cups. It’s increased from a very small baseline.”

4.5. Influencing staff to reduce single-use plastic use at home

When asked to identify the extent to which their business teaches pro-environmental habits (such as plastic prevention and recycling) to staff in the workplace, which they can then use outside of work, 47% of survey respondents said their business is doing this (a lot or a little). 29% said this does not occur at all within their business (figure 12). This suggests there is a certain amount of ‘behavioural spill over’ occurring whereby staff implement certain pro-environmental behaviours at home, which they have learned in the workplace. While this spill over effect is better known with recycling, it could also be occurring with learned behaviours around single-use plastics.

Figure 12: Extent to which businesses teach pro-environmental habits to staff



Base = 1006

As shown in figure 1 earlier in the report, over one fifth (22%) of UK businesses believe they are responsible for encouraging their staff to reduce their personal use of single-use plastic at home. This was highest for businesses within the medical and health services sector, and lowest for those in the real estate sector (14%).

Similarly, almost a quarter (24%) of businesses say they are responsible for encouraging their staff to recycle at home. This is highest in the real estate (35%) and retail (32%) sectors.

Although positive, these figures suggest there remain around three-quarters of UK businesses who believe it is not their responsibility to encourage pro-environmental behaviours of staff outside of the workplace. When discussing this, responses among the businesses interviewed were mixed. Many suggested they are responsible, to some extent, to influence pro-environmental behaviours beyond the workplace. Some interview respondents discussed a perception that habits learned in the workplace, or as part of job roles, are taken home and implemented or shared with others. However, others indicated that staff seem to have stronger pro-environmental habits at home, compared to the in workplace, and can work to put pressure on the business to implement change.

“There are lots of our messages (to customers) that are well embedded in staff and we like to think that they go home and talk to their friends and families to pass those messages on, like not flushing wet wipes.”

“I think it’s more the other way around at the moment, with staff taking action at home and bringing it into the workplace. Our staff really are passionate about reducing their plastics use.”

“There seems to be a disconnect among staff, between their behaviour towards waste at home and their behaviour towards waste at work. It’s like it’s less important to do the right thing at work.”

4.6. A review of initiatives currently in place in businesses

A desk review of initiatives around single-use plastic prevention within business, both in the UK and globally, highlighted a number of changes that have been implemented to tackle this issue. These range from eliminating plastics from workplaces and retail sites, encouraging staff to reduce their personal use of single-use plastics, and encouraging customers to do so also. The review includes both initiatives which have been, or are in the process of being, implemented at scale (e.g. across multiple stores), as well as those which are currently being trialled on a smaller scale. A number of these are outlined below.

For many of the examples highlighted by the review, it was not possible to identify the outcomes of these. Many positive initiatives among business, it seems, are not measured in terms of success beyond the estimation of tonnes of waste prevented from landfill. We suggest more should be done to understand the impact of these initiatives on customer, employee and stakeholder perceptions, attitudes and awareness, as well as how these initiatives can be improved, replicated, and scaled.

Single-use plastics in the workplace

The following initiatives highlight a number of workplaces who have implemented changes to reduce the amount of single-use plastics used by staff. These range from straightforward swaps (e.g. eliminating plastic bottles in staff vending machines), to staff engagement initiatives (e.g. pledges, awareness campaigns).

- **Lloyd’s Banking Group:** In 2018, reusable coffee cups were given to colleagues at 48 of their largest office sites, a 25p disposable cup levy was introduced at those sites and all plastic cutlery, and plastic straws and condiments sachets were removed from all restaurants and cafés. This is estimated to prevent the use of over 35 million items of single-use plastic annually.
- **Adidas:** In their head office in Vietnam, staff have banned all single-use plastics from the office (plastic bottles, plastic bags, plastic cups, plastic food containers), asking colleagues to co-design solutions for finding alternatives. Changes included:
 - Setting up centralised waste bins replacing individual employee bins, saving more than 15,000 plastic bin bags a year
 - Replacing plastic water fountains with glass and metal ones.
 - Encouraging all staff to sign their commitment against plastic on a pledge board hung in the centre of the office. In return each staff member received a glass

reusable water container.

- Providing water glasses which were specially designed and printed with a recycling message and used by both employees as well as visitors.
- Regularly organised events to enhance sustainability and to raise awareness among their staff.
- **teapigs:** In their head office in Brentford, England, teapigs implemented their The Big Plastic Clear Out – an attempt to turn the office completely plastic-free. Changes implemented included:
 - Providing communal oats for staff to share, in place of individual, plastic-lined packets
 - Switched to Fruitful Office – the delivery of seasonal fruit that comes loose in a basket. The baskets themselves come wrapped in biodegradable film
 - Signed up with First Mile for recycling. They collect more materials than the local authority and also send reports letting the organisation know how much they have recycled each month. This allowed the implementation of a food waste collection service. Tea bags and any food waste can go straight in to the caddy for daily collections
 - Implemented a milk bottle delivery (in glass bottles). The empties are collected every night and reused
 - Implemented ‘Waste Watchers’ whereby every Friday the office fridge is cleared out and staff have a communal lunch using any leftovers
 - Stopped purchasing plastic pens completely, using up any they have currently at home or work (which they predict will last them for years!)
 - Communal homemade food (e.g. soup and hummus) brought into the office in place of individually packaged items
 - Replacing cleaning products with refillable options
 - Providing metal straws in the office for anyone wanting to use them
- **BRITA UK:** In their UK offices, BRITA have removed all single-use plastic bottles from staff vending machines, switched all single-use plastic cups next to water dispensers to paper, provided all employees with a reusable water bottle, and plan to change all plastic milk bottles to glass by the end of the 2019, avoiding the use of approximately 10,000 plastic milk bottles per year.
- **BBC:** The BBC will ban single-use plastics from its operations by 2020. Plastic cups and cutlery have been removed across BBC sites, ending the use of around 2 million plastic cups used by visitors and staff each year. There are plans to remove plastic containers from canteens, which started with a pilot in Salford in February 2019, where a coffee cup recycling scheme was also trialled (no information available on the outcomes of this trial).
- **BT:** BT ran an internal plastics campaign, ‘Let’s Get Drastic About Plastic’ which encouraged all employees to sign up to a plastics pact to make a commitment, either at home or at work, to reduce their use of single-use plastics. They were challenged to take action over the following weeks and months, and had sign-up from over 4,500 staff. To help with the commitment, staff could sign up to receive a free reusable water bottle or coffee cup. In addition to the pact, awareness raising activities were carried out to educate on the impacts of plastic. This included a ‘plastic pop up’ which

visited eight of BT's largest sites and included interactive games, quizzes, and prizes. The ideas developed by the pact, for ways in which people can reduce plastics, were then distributed to staff as tips. BT also have a plastic 'hackathon' planned for 2019 whereby 100 staff will co-design targeted solutions for tackling plastic.

- **University of Leeds:** Multiple initiatives have taken place across the campus to decrease its plastic use. These include:
 - replacing plastic salad containers with card based, biodegradable boxes
 - replacing the 1000 single-use plastic sauce sachets used every week with large tubs which students serve themselves
 - replacing certain single-use laboratory equipment with reusable alternatives
 - eliminating single-use plastic cups from bars, saving an average of 9000 cups per month
 - introducing a 20p discount in cafés for those using reusable cups
 - making funding available for individual workspaces and offices within the university to help them become plastic-free. This is up to £200 per workspace, to be spent on reusable items such as KeepCups.
- **Trafford council:** Trafford Council is phasing out single-use plastics in their town hall building, asking employees to avoid bringing single-use plastic bottles into work, and use reusable coffee cups in place of single-use. As part of the initiative, plastic straws will be replaced with paper ones, glasses will replace single-use plastic cups, and all single-use plastic cutlery will be removed.
- **EY (financial and management services firm):** This firm have reduced plastic consumption in their 23 UK offices, employing a strategy to cut single-use plastics across their workplaces. They conducted a full review of plastic items in all workplace functions, focussing initially on the elimination of high volume single-use plastics. This has eliminated 91.3% of single-use plastic consumable products in the first 8 months of the project. Measures so far have included:
 - Switching 1.2 million plastic catering consumables (e.g. cutlery, food packaging) to biodegradable alternatives
 - Replacing 6.5 million plastic and paper-based disposable cups in offices with reusable cups and bottles
 - Encouraging staff to bring reusable cups when they buy hot drinks from their coffee shops by charging for disposable cups and donating a portion of the profit to a marine conservation charity
 - Sourcing non-plastic stationary products and switching from new to reconditioned products where available.
 - Eliminating non-essential plastic corporate merchandise and branded plastic carrier bags, switching to biodegradable packaging.
- **Aston University:** The university achieved Plastic Free status, as part of the Surfers Against Sewage scheme, in December 2018. Initiatives part of this have included:
 - Disposable coffee cups replaced with compostable cups
 - All single-use catering cutlery and plates replaced with crockery and silverware, which is washed in-house

- Removed all plastic stirrers and straws
 - Introducing a levy on coffee cups and fizzy drinks fountain cups to promote the use of reusable cups
 - Stopped providing water in single-use plastic bottles in all hotel rooms
 - Replaced pens in conference spaces with pencils
 - Increased water refill points throughout the campus
 - Banned balloon releases on campus
 - Removed plastic bags in the student union shop
- **Environmental Justice Foundation:** The organisation's London office became plastic-free, asking staff and implementing changes to eliminate plastics from the office. Changes included purchasing milk in glass bottles; using loose leaf tea, ordered in bulk; visiting stalls at lunch which serve food in non-plastic packaging; sharing home cooked and baked foods in place of shop bought food in plastic packaging; and replacing cleaning products with Splosh, a company which replaces the contents of cleaning products when they run out, at concentrate, to allow you to re-fill the same bottle over and over.
 - **University of Groningen:** The university organises a plastic-free week every year, challenging staff and students to buy no plastic for one week. During the week, they also run awareness and engagement activities, such as film showings, lectures, and free workshops (e.g. learn how to knit with recycled plastics).
 - **Plastic-free Paradise Training:** Ten businesses on the Indonesian island, Gili Air, have received the free of charge #PlasticFreeParadise training. This gives employees the knowledge to work and live plastic-free and run a sustainable business.

Single-use plastics in retail

The following are a variety of initiatives that have been implemented in retail environments to encourage customers to reduce their use of single-use plastics. Again, these range from more straightforward swaps (e.g. eliminating straws from cafés, offering packaging-free food items) to customer behaviour-change initiatives (e.g. using financial incentives to encourage use of reusables).

- **Gatwick Airport:** The airport is trialling a reuse system for coffee cups sold within the airport's South Terminal. Starbucks customers within the terminal will be given the option to borrow a free reusable cup for their drink, in place of a single-use cup, which they can then drop off at one of five 'Cup Check-In' points before they board their flight. The scheme will be promoted by Starbucks staff at point of sale and reinforced with messaging throughout the airport and social media.
- **Waitrose:** The supermarket chain is trialling a packaging-free refill station in their Oxford store, asking customers to bring their own reusable containers to buy and refill produce such as pasta, rice and cereals. This is the first UK supermarket chain to replicate the system used by many zero waste stores across the country.
- **Morrisons:** Across all stores, Morrisons have moved to paper bags for loose fruit and vegetables, in place of plastic, removing 269 tonnes of plastic per year, as well as changing flower bouquet wrapping from plastic to paper. In addition to this, the supermarket chain have removed plastic straws from sale and cafés, stopped using

plastic wrap on certain fruit and vegetables, including cucumbers, and offer free water refills to customers, installing water fountains at newer stores.

- **Canary Wharf Group:** workers and visitors to Canary Wharf can now top up their water bottles on the go, with the installation of seven new water refill stations Canary Wharf's shopping malls. This has been implemented as part of their #BreakingThePlasticHabit campaign which aims to see the Estate become the world's first plastic free commercial community, an initiative from Surfers Against Sewage.
- **Glasgow Airport:** free water refill stations have been installed in the airport, and retailers within the airport also fill up water bottles on request.
- **Selfridges:** Selfridges have eliminated all drinks in single-use plastic bottles from their stores (and offices), providing drinks in glass and aluminium cans only. They have also made available to customers the world's first edible water 'bottle'; a water vessel made entirely from natural and biodegradable seaweed.
- **Asda:** the supermarket chain have committed to making their head offices and cafés single-use plastic free, and reducing the use of single-use plastics in their own-brand products. A number of changes they have implemented as part of this are:
 - Replaced all polystyrene pizza bases with cardboard, saving 194 tonnes of plastic
 - Started selling 'naked' swedes - removing the plastic wrap and saving 14 tonnes.
 - Removed cellophane wrap from greetings cards, saving 140 tonnes
 - Switched black plastic fruit and vegetable trays to recyclable clear plastic.
 - No longer selling 5p single-use plastic carrier bags in their stores
 - Taken plastic straws out of customer cafés and stopped selling them completely in stores
 - Wrapping Asda magazines in paper rather than plastic
 - Committed to reporting on their annual plastic footprint to customers
 - Working with Leeds Beckett University to research new materials which do the same job as plastic, but without its environmental impact.
- **Tesco:** Tesco have ran a small scale trial across two stores in Watford and Swindon whereby 45 loose fruit and vegetables are available without plastic packaging. This is part of an aim only use packaging which is absolutely necessary to protect and preserve their foods. Results of the trial are not yet available, but outcomes such as customer satisfaction and food waste are being monitored. In 2018, it was also announced customers can use their own reusable containers to buy meat, cheese or fish from deli and fish counters in stores across the UK.
- **Boots:** The pharmacy retailer are trialling a deodorant re-fill scheme with 5,000 of their customers whereby empty containers are returned by post, cleaned, refilled by the company, and returned to the customer. Although results from the trial are not yet available, initial customer feedback seems positive with 70,000 customers applying to take part.
- **Marks & Spencer:** M&S launched its plastics plan in early 2019, with the goal of becoming a zero-waste business by 2025. The retailer has removed 75 million pieces of plastic cutlery from its stores, and replaced 2 million straws with paper alternatives. A three-month trial has also taken place in their Tolworth store, making 90 lines of

their loose fruit and vegetables completely free of packaging (therefore also removing 'best before dates'). Based on insights from this trial, as well as customer feedback, M&S will look at how this can be replicated in a longer term strategy.

- **Iceland:** the supermarket have replaced plastic bags used to package bananas with recyclable paper bands, saving 10 million bags per year. They have also launched a trial in one of its larger stores where 35 items will be sold loose and 27 lines sold in plastic-free packaging, such as compostable punnets, paper bags, and cellulose nets. Loose produce will also be sold at a lower price in a bid to encourage uptake. This is part of their commitment to eliminate plastic from all of its own-label packaging by 2023.
- **NorthLink:** The ferry operator have eliminated more than 200,000 items of plastic used on their ferries each year, by replacing disposable cups and lids with compostable alternatives, and removing plastic cutlery, food trays and sauce pots.
- **Loop (various organisations):** Procter & Gamble, Nestlé, PepsiCo, Unilever, Mars, Coca-Cola and others launched their partnership with Loop in early 2019. This new initiative, ran by TerraCycle, pilots a new system of high-quality packaging that can be turned and refilled again and again. The online service launched in New York and Northern France with around 300 products. The initiative is expected to expand to high street retailers, such as Tesco and Carrefour, in the coming months where customers can deposit their empty packaging in a container, scanning a QR code to register the deposit.
- **Pret-a-manger:** This chain offer a 50p discount to customers using a reusable cup in place of a single-use cup for takeaway hot drinks. Many other coffee shop chains have implemented similar systems, although Pret-a-manger offer the largest discount (e.g. Costa and Starbucks offer a 25p discount).
- **Boston Tea Party:** This independent coffee shop chain banned the use of single-use coffee cups at their sites in 2018, asking major coffee brands to follow suit. Customers are asked to drink inside the café or bring their own reusable mug. The move had a negative impact on profits, with takeaway coffee sales falling by 25%, but has prevented 125,000 cups going to landfill and resulted in the sale of 40,000 reusable cups.

Recycling in retail

Below are a small selection of the retailers currently implementing customer-focused recycling initiatives.

- **Zara:** this high street fashion retailer runs an in-store recycling initiative, allowing customers to drop off unwanted clothing in 'fashion bins'. This is currently only available at selected stores. In Spain, the store also offers a free home pick-up of clothes for recycling each time an online order is made. Customers are asked to package up their unwanted items and hand them to the courier when their order is delivered.
- **Debenhams:** the department store chain collects unwanted and damaged items for donating to the Salvation Army. In 2018 this resulted in the collection and donation of 6.3 tonnes of items. The store also has a closed loop recycling system for its clothes hangers, with approximately 16 tonnes of recycled materials being produced from these each week.

- **H&M:** H&M have been offering a garment recycling service across all their stores, globally, since 2013. They accept clothes from any brand, in any condition, and for each bag of unwanted clothes donated, customers receive £5/€5 to use towards their next purchase.
- **Tesco:** In 2018, in-store recycling machines were trialled at stores in Borehamwood, Swansea, Edinburgh, Manchester and Birmingham. Customers using the machines receive 10p for every plastic bottle deposited.
- **Marks & Spencer:** Marks and Spencer has launched an in-store plastic recycling scheme for customers. Stores now accept difficult to recycle packaging from any retailer, including black ready meal trays, crisp packets, sauce sachets and certain cosmetics containers, which would often otherwise end up in landfill. The scheme has initially launched at eight M&S stores and will roll out to stores nationwide by the end of 2019. In addition to this, the chain have partnered with Oxfam to encourage customers to recycle unwanted clothes. By donating an item of their branded clothing or soft furnishings to Oxfam, customers receive a £5 voucher.
- **Costa:** The café chain implemented a bring back coffee cup recycling system in all stores across the UK. Customers can deposit
- **Levi's:** This in-store recycling initiative offers customers in the UK a 10% discount on Levi's products, in return for leaving a bag of any brand of clean, dry clothes or shoes at their collection boxes in store.
- **Apple:** Any qualifying Apple device can be recycled online and at any Apple Store, giving customers a gift card in return. The device is then either refurbished for resale, or the materials are recycled.
- **Lush:** While many of Lush's products come without any packaging at all, for those liquid and jelly products that do, pots can be returned to store and for every five empty pots, customers will receive a free face mask. This is closed-loop recycling scheme, with the recycled material being made into more pots for stores.
- **MAC Cosmetics:** Customers can return MAC primary packaging containers to any MAC store, counter, or online. In return, for every six items returned, customers receive a free MAC lipstick.
- **Kiehl's:** This store uses a loyalty card system whereby for every empty product returned to Kiehl's stores in the UK, customers receive one stamp on their loyalty card. When the customer reaches 10 stamps they receive one product worth up to £9.
- **Fat Face:** Partnering with I:CO, Fat Face have introduced clothes and shoes recycling boxes across their stores.
- **Tim Hortons:** This Canadian coffee shop chain implemented a closed-loop recycling system to turn their used single-use coffee cups into cardboard beverage trays. Customers are asked to return cups to any Tim Hortons store.

4.7. Co-designing solutions: Encouraging staff to reduce single-use plastics in the workplace

Below are a series of potential behaviour-change interventions developed in the stakeholders' workshop. These focus on the types of initiatives, beyond the 'straightforward swaps' or 'quick wins', which can be put in place to encourage staff to reduce their use of single-use plastics in the workplace.

Toolkit for reducing plastic waste in small to medium-sized enterprises

This will be a freely available digital toolkit for small and medium-sized businesses in the UK to assist them in taking action to reduce their single-use plastic waste, and that of their staff and customers. The toolkit will include content such as:

- sample policies and strategies around plastic waste prevention
- guidelines for carrying out a plastics audit
- tips and ideas for 'quick wins' in terms of eliminating plastic waste
- templates and resources which can be tailored to each organisation (e.g. internal communications)
- a directory of sustainable suppliers
- methods of monitoring and evaluating success on plastic waste preventions
- case studies and success stories

The aim of the toolkit will be to provide sufficient information to businesses, to support them in overcoming many of the current barriers they experience in single-use plastic prevention (e.g. lack of knowledge of non-plastic alternatives).

In order to fully understand the impact and effectiveness of the toolkit on the plastic waste of a business, and help to refine and improve its content, it is suggested this is trialled with one or more businesses prior to being launched more widely. The trial could implement and robustly monitor each of the elements of the toolkit, as part of a full programme of work, to understand its impact. For distributing the toolkit following a trial, this could be achieved through working in partnership with a business network such as the Federation of Small Businesses.

Single-use items not claimable on expenses

This initiative will prevent staff from claiming expenses for items purchased in single-use plastic packaging. Although tailored to each organisation, including specific terms and exceptions, the system will only reimburse company expenses for food and drink items if the item was purchased without single-use plastic packaging.

The plastic-free expenses system would be supported by internal communications and would be tested or phased in with a small group of employees prior to a full rollout.

Bespoke internal plastics campaign

This will be a bespoke behaviour change campaign, using internal communications, aimed at encouraging staff to reduce their use of single-use plastics. The campaign will be designed with the business, tailored to their specific audience, working environment, and communication channels. The campaign will involve insights and facts about plastic usage, and tips, messages, and education on how they can reduce their own use of plastics, both in and outside of the workplace.

Plastic-free kits for out-and-about workers

Staff who are often 'out and about' for their roles are often more likely to use single-use plastic items, such as on-the-go food and drink packaging. This intervention would therefore provide a kit for these workers to help them reduce their plastic waste while at work. The kit will include free reusables (e.g. water bottle, hot drinks cup, cutlery set, lunch box), as well as a plastic-free handbook with tips for reducing their plastic waste. The handbook would be tailored to the organisation and its specific job roles, but could include recipes for homemade lunches, suggested retailers for plastic-free shopping

options, and checklists to remember when leaving the house (e.g. when staying in a hotel, decant some of your own shampoos and soaps instead of using hotel miniatures in single-use plastic).

Plastic-free lunchtimes

This intervention will work with workplaces to assess how they can make tweaks to their kitchen/lunch spaces to be more plastic-free and 'eat in' friendly. The aim of the intervention will be to encourage staff to reduce their use of plastic by using reusable alternatives, and spending more time eating in rather than out. This would involve a diagnostic process for each workplace, suggesting changes such as:

- a sufficient social space away from working areas for staff to eat lunch
- convenient access to re-fill points for water/other drinks
- free provision of reusable alternatives to plastic
- designing the kitchen/lunch space to be more attractive and appealing
- providing a location to wash reusable alternatives to plastic
- providing messaging or initiatives to support and highlight these changes (e.g. weekly shared lunch days where staff each bring one homemade dish)

Internal plastics squad

This will be an internal group of staff, from a range of teams, who are responsible for auditing and reducing the single-use plastic used in their organisation. The squad will first carry out an audit, for which guidance on monitoring the use of plastics will be provided (e.g. a sample staff survey). Following the audit, the squad will use this information to implement changes, and design a range of activities and communications. Although this will be dependent on the organisation, it could include initiatives such as setting up a 'reducer of the month' award for staff to incentivise plastic waste reduction, or a competition or pledge element for staff to take part in. As part of a trial, the plastics squad would be provided with guidance and tips to assist them in developing initiative ideas.

Waste less for good

This will use a social good incentive to encourage staff to reduce their use of single-use plastics in the workplace. The more plastic waste that is collectively avoided, the more money that will be donated to a charity by the organisation. Plastic waste avoidance would be monitored using a counter or tally placed in a visible location in the workspace (e.g. one point for each time a reusable bottle or cup is used). When the counter reaches a certain amount, money will be donated to the employees' chosen charity.

4.8. Co-designing solutions: Encouraging customers to reduce single-use plastics in retail environments

Below are a series of potential behaviour-change interventions developed in the stakeholders' workshop. These focus on the types of initiatives, beyond the 'straightforward swaps' or 'quick wins', which can be put in place to encourage customers to reduce their use of single-use plastics in retail environments.

Re-fill station re-design

This intervention will involve the redesigning of water re-fill stations in retail environments and elsewhere, to make them more attractive, appealing and salient, increasing their use and decreasing the purchase of bottled water. Taking place in retail environments such as

coffee shops, and other environments such as transport hubs, this would use techniques such as colour and nudges to increase their salience and attract people towards them. The re-design would also give the stations a premium and hygienic feel, by being simple and well maintained, aiming to improve perceptions around the quality of the drinking water provided. As part of this trial, the location of re-fill stations would also be reviewed to identify locations which are most appropriate and convenient for the user, in order to maximise their use.

We suggest this trial would provide insight into the most effective design and positioning of re-fill stations and, if effective, will provide further justification for increasing the availability of these in public spaces nationally.

Re-fill meal deals

This would introduce a re-fill option for drinks purchased as part of meal deals in cafés, coffee shops, supermarkets and fast food chains. In place of purchasing a soft drink in a plastic bottle, or a hot drink in a single-use cup, customers will have the opportunity to re-fill their reusable bottle or cup with their drink of choice, using a self-service machine. Re-fill machines, or the option to use them, would be presented to customers at the point of decision-making, to encourage them to move from their typical purchase to a re-fill option. This could also act as a prompt for customers without reusable bottles or cups, to remember to bring them next time.

In order to increase uptake, this could be supported by a financial incentive (e.g. meal deals purchased with a re-fill option are discounted), or pro-environmental message. This could first be trialled in retail environments which have existing self-service infrastructure for drinks (e.g. Subway, IKEA), with a view to extending this to retailers more widely.

Plastic waste reduction messages from staff

This initiative aims to give staff in retail environments the tools and training to provide customers with information and messaging on reducing their single-use plastic use. This would be tailored to (and co-designed with) each business, assessing how both the messages and training can best work within current working practices and routines, and the types of single-use plastics typically used by customers. For instance, staff could provide an at-till message asking customers if they have remembered their reusables today (e.g. reusable bags, coffee cups). Alternatively, staff could be incentivised to increase their sales of reusable alternatives to single-use plastics through a competition across stores. Front-line staff engagement on these messages would also aim to increase their awareness on the importance of plastic waste reduction (e.g. through a pack for new starters or free reusables for staff).

Safe to drink message at drinking water stations

This intervention will aim to increase use of existing water taps through using a 'safe to drink' message. At existing public taps, filtered water stations etc. where the water is safe to drink, a message will be placed to encourage people to use this facility to re-fill their reusable bottles in place of buying water while on-the-go and in retail environments. This will aim to address any user concerns on the quality of water, and prompt them to use public taps.

Deposit-return for premium reusables at closed events

This intervention will ask customers at closed events, such as sports games, festivals and concerts, to purchase an attractive and 'premium-feel' reusable alternative to single-use drinks cups when purchasing a drink from on-site bars or vendors. For each subsequent purchase made, they will then have their reusable cup (or a clean one) refilled. At the end

of the event, the customer will have the option to return the cup and receive their money back, or keep the cup for future use. In order to ensure re-use or return of the cups, they will be designed to be attractive and specific to the event and its audience, and the value of the deposit will be substantial enough to warrant returning.

This is a system currently used at a number of events; this trial would robustly monitor the impact of this and its scalability to a range of retail environments.

Incentivising eat-in rather than on-the-go

For retailers such as coffee shop chains who offer both eat-in and eat-out options, this intervention would offer an incentive for customers choosing to eat-in, and who therefore avoid use of on-the-go, single-use plastic items such as coffee cups. Often this is something that is 'disincentivised' through the cost of eating in being higher than the cost of take-away. This trial would therefore understand the impact of the cost of eating-in, avoiding plastic waste, being lower.

Plastic-free shelves

This intervention will change the positioning of plastic-free items in supermarkets, to place them in a more prominent, visible location, close together to other plastic-free items. For instance, items could be a plastic-free shelf placed at eye level, with the aim of nudging customers to purchase these above the items in plastic packaging, placed in a less prominent location. Plastic free shelves could be branded using specific messaging or colour to easily highlight to customers how they can make choices which produce less plastic waste.

In-store reusable tally

This intervention will aim to make using reusables a social norm through placing a tally or counter in-store which increases each time a reusable (e.g. coffee cup, bag, bottle, container) is used. This will be highly visible to all customers, and increase in real-time, highlighting the number of customers avoiding plastic waste. This could be done in a number of ways to suit the specific retail environment; for example, customers who use a reusable coffee cup in a café could receive a counter at the till which they are asked to place in a transparent container on their way out of the store. Alternatively, this could be a simple tally on a chalkboard, which each customer using a reusable is asked to add to. The counter or tally would be supported by positive communications to highlight and normalise this success.

Plastic-free points

This will be a loyalty scheme which rewards customers for regularly using a reusable alternative to plastic. The scheme could use a points card whereby customers receive a point each time they use a reusable alternative to plastic (e.g. a reusable cup in a coffee shop), or when they avoid the item entirely (e.g. purchase loose vegetables above packaged ones in a supermarket). Points could then be exchanged for rewards, such as vouchers off shopping or a free sandwich and coffee. Depending on the retailer, this scheme could be combined with their existing infrastructure (e.g. additional points on a Clubcard).

5. CONCLUSION & RECOMMENDATIONS

5.1. Conclusion

This research has identified many positive changes businesses are making to reduce their use of single-use plastics, and that of their staff and customers. With the provision of reusables, elimination of plastics, and examples of awareness-raising and engagement across sectors, there are many initiatives businesses can learn from and implement.

Whilst there remain challenges to tackling plastic waste within business, an average of 45% of businesses surveyed suggested these were not barriers preventing them from doing so. We therefore suggest that given the right support, infrastructure and education, businesses can work to overcome these challenges to reduce their reliance on single-use plastic and that of their staff and customers.

With 47% of businesses believing it is not their responsibility to reduce their use of plastics, 29% viewing the prevention of plastic waste as unimportant to their business, and 52% suggesting they are doing all they can to do reduce their plastic waste, we suggest it is vital that businesses, as a whole, do much more to address these issues. The positive changes many businesses are implementing are seemingly not being replicated across British business. Ultimately, business has a central role to play in tackling plastic waste and pollution, and there is some way to go in bringing this up in the agenda and taking action.

5.2. Recommendations

Given the findings from this research, a number of recommendations can be made for businesses to further reduce their reliance on, and production of, single-use plastics, and that of their staff and customers.

1. Firstly, it is recommended that businesses on the whole must take much greater responsibility and leadership in eliminating single-use plastics. Businesses have a vital role to play in demonstrating to their sector, staff, customers and suppliers how changes can be implemented to drastically reduce single-use plastics. Aside from the urgent environmental need for this, it is also about sound business practices. It is broadly recognised that the fastest growing purchasing and employment decision influencer is the 'green' reputation of a business, and as such, businesses which do not recognise the need for greater responsibility and leadership are at risk of being left behind.
2. All 'quick wins' in terms of single-use plastics, where they can be eliminated, should be implemented. A number of examples of these (as identified during the desk review and developed during the co-design workshops) which we are calling on businesses to replicate at scale, are:
 - Eliminate single-use plastic cutlery from all retail and workplace sites, replacing with reusable alternatives. Where this is not possible (e.g. in the on-the-go food and drink retail) they should be replaced with wooden or compostable cutlery.
 - Eliminate the sale and availability of single-use plastic drinking straws from all retail and workplace sites.
 - Provide staff with reusable water bottles and coffee cups
 - Ban plastic bottles and single-use coffee cups from workplaces, asking members of staff to commit to not bringing these items into the workplace. This should be implemented along with the availability of drinking water taps or fountains for staff to refill their reusable bottles.
 - Implement a 'safe to drink' message at water taps to encourage re-fill in retail

and workplace environments.

- Replace plastic milk bottles with glass bottle milk delivery service in workplaces.
 - Remove all single-use plastic bags from sale in retail environments, replacing with paper bags for loose items (e.g. vegetables) and the sale of reusable alternatives.
 - Utilise re-fill schemes for cleaning products in workplaces (e.g. Splosh, Ecover).
 - Remove cellophane wrapping from magazines and newspapers in retail environments and, where necessary, replacing this with compostable² alternatives.
 - Replace single-use pens with pencils or refillable alternatives.
 - Ban the use of balloons and balloon releases.
3. Having implemented the 'quick wins', businesses should then look to make more innovative and systematic changes to further reduce their use of single-use plastics. A number of examples identified by the desk review and developed during the co-design session, are:
- Running a staff engagement campaign to increase awareness of the issue of plastic waste.
 - Running a staff co-design session to develop ideas for targeted changes that can be implemented within their organisation.
 - Retailers to trial packaging-free product lines, asking customers to bring their own reusable containers where necessary.
 - Retailers to strongly incentivise the use of reusables in place of single-use plastics (e.g. discount on purchase).
 - Retailers to strongly incentivise the purchase of packaging-free items (e.g. sold at a lower price than packaged items).
 - Consider how staff can be incentivised to make plastic-free choices through adaptation of expenses policies (e.g. expenses not paid for certain single-use plastic items).
 - Consider how staff can be encouraged to make plastic-free choices through using a social good incentive (e.g. donation to charity).
 - Invest in research and innovation, partnering with universities for instance, for the development of new plastic-free solutions.
 - Look to encourage communal/homemade lunches in workplaces in place of shop-bought 'food-on-the-go'.
 - Work towards plastic free accreditations (e.g. Surfers Against Sewage Plastic Free status).
 - Hold waste and re-use workshops or events (e.g. lunch preparation workshops, upcycling plastics).
 - Trial the use of deposit-return schemes for reusable alternatives to single-use plastic items at closed events (e.g. sports games, concerts, festivals).
 - Assess how existing drinking water fountains can be made more salient and attractive to increase use.

² Prior to use of compostable alternatives to single-use plastic, an assessment must be carried out to identify their environmental impact.

- Consider how frontline retail staff can provide waste reduction messages to staff (e.g. an at-till message to ask “have you remembered your reusable bag?”).
 - Consider how the availability of plastic-free items can be emphasised in retail environments (e.g. plastic-free aisles and shelves).
4. Businesses should pilot and robustly monitor such initiatives to identify their effectiveness in encouraging staff and customers to reduce their use of single-use plastics. Effective interventions should then be assessed for potential scaling (e.g. across the organisation or more widely). Businesses should show leadership in their sector, and openly share outcomes, learnings and recommendations from such pilots for other businesses looking to replicate these changes.

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