

Plastic bags in Wales



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ICARO
INSIGHT INTO FOCUS

Methodology

- **Fieldwork:** online survey with dedicated market research panels. 1,003 adults, 04-17 July 2022.
- **Quotas:** age/gender interlocked, Welsh region and social economic grade.
- **Access:** The questionnaire was translated into Welsh and respondents were offered the opportunity to complete in English or in Welsh
- **Sub-group analyses:** Socio-demographics (e.g. age, gender, children in the household)
- **Statistical significance:** statistical tests have been undertaken to the 95% confidence level (i.e. 95 times out of 100 the observed difference will be real vs. 5 times it will happen by chance).

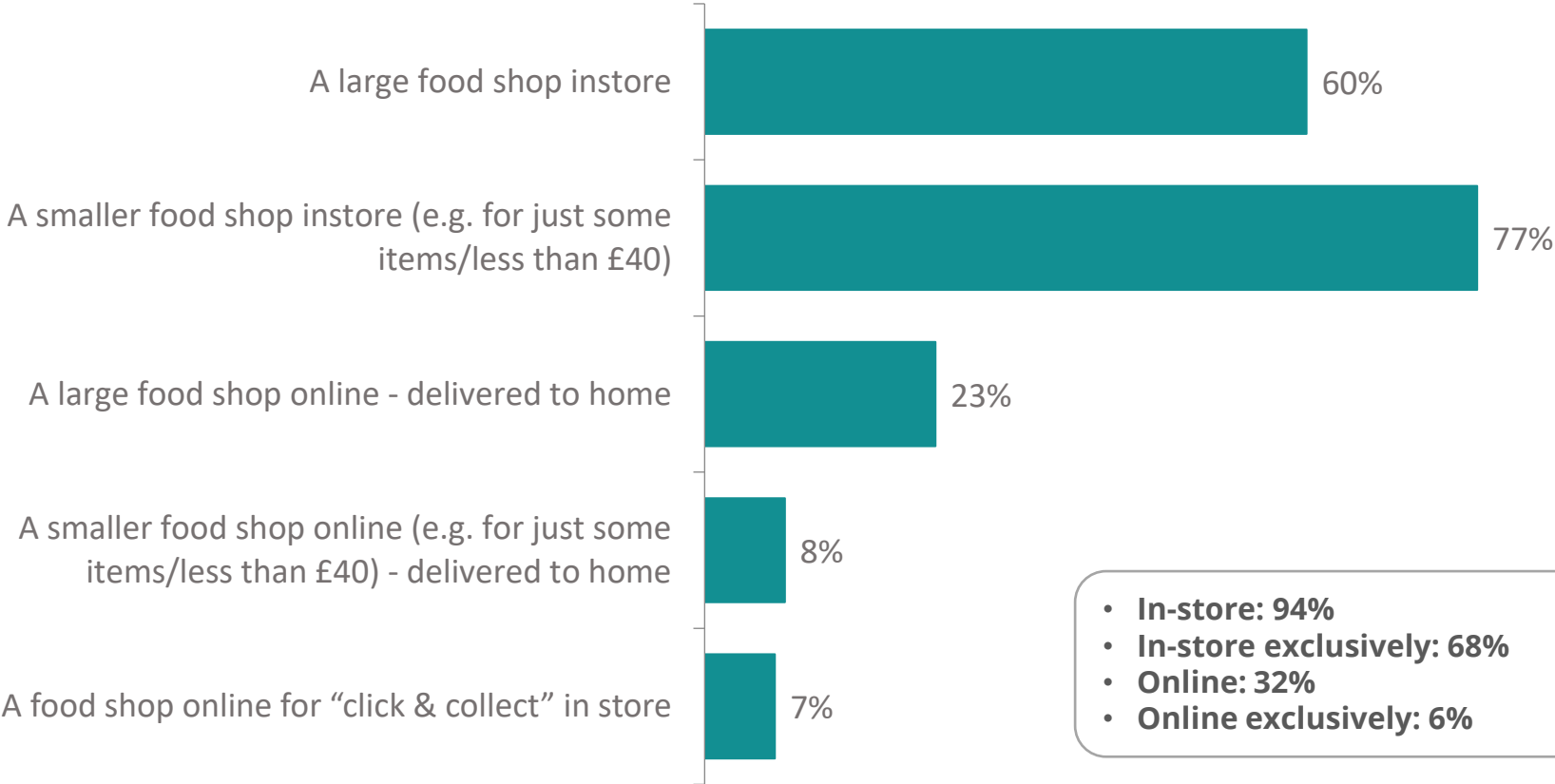


Plastic carrier bags

1. Grocery shops in the past two weeks

Grocery shopping in Wales

Q. In the past two weeks, which of the following – if any - have you personally done yourself?

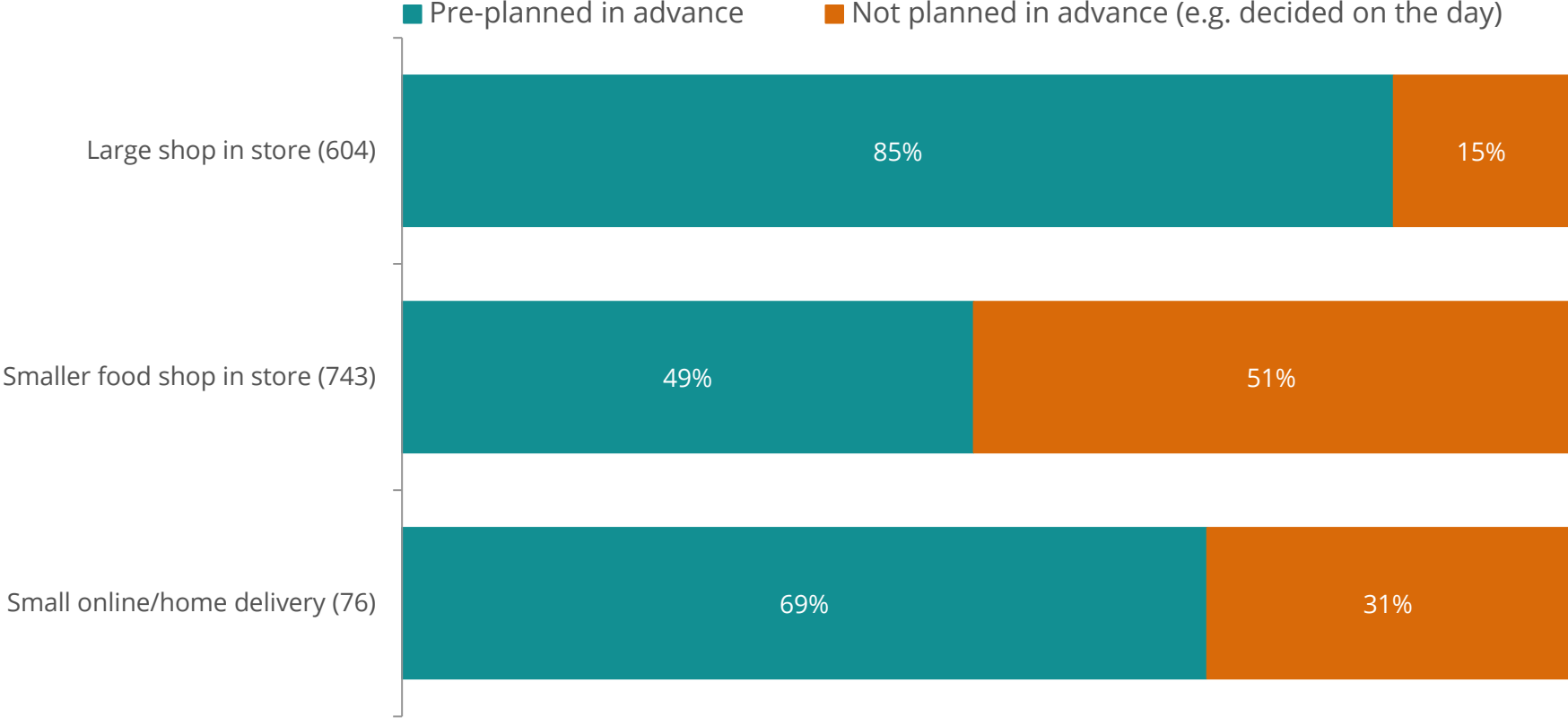


Base: 1,003 Adults in Wales

2. Nature of the grocery shop

Levels of planned shopping behaviour

Q. You said that you have done a [ADD TYPE OF FOOD SHOP] in the past two weeks. Thinking about the last time you did this, was it a pre-planned shop that you knew in advance that you'd do, or an unplanned shop (e.g. you decided on the day)?

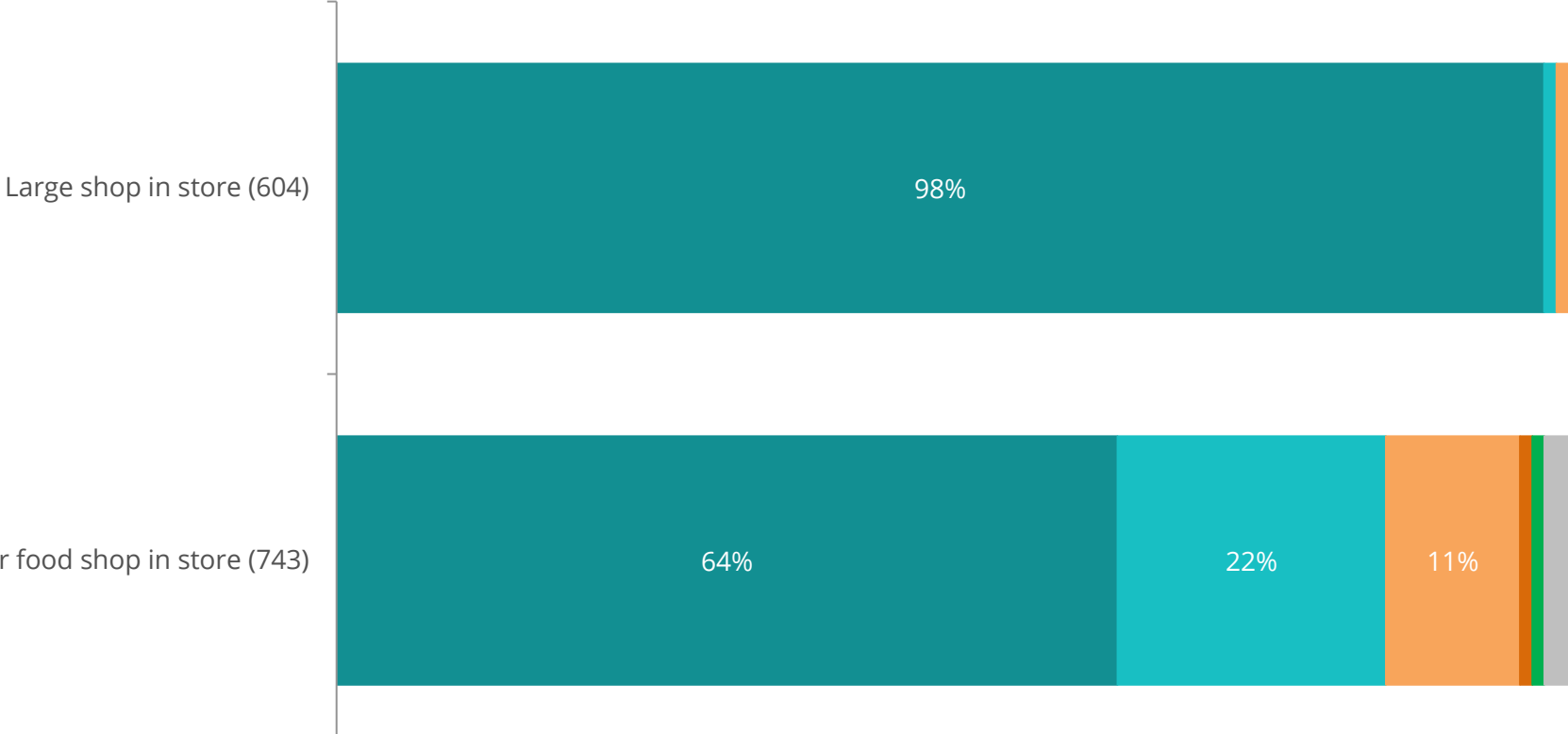


Base: Adults in Wales who answered about their recent food shopping through these kinds of shops (base sizes in brackets)

Where the shop was undertaken

Q. Which of the following best describes what kind of shop it was?

- Supermarket
- Mini/express supermarket
- Local store
- Greengrocer/deli
- Farm shop/market
- Somewhere else



Base: Adults in Wales who answered about their recent food shopping through these kinds of shops (base sizes in brackets)

3. Bags use

Bag mix

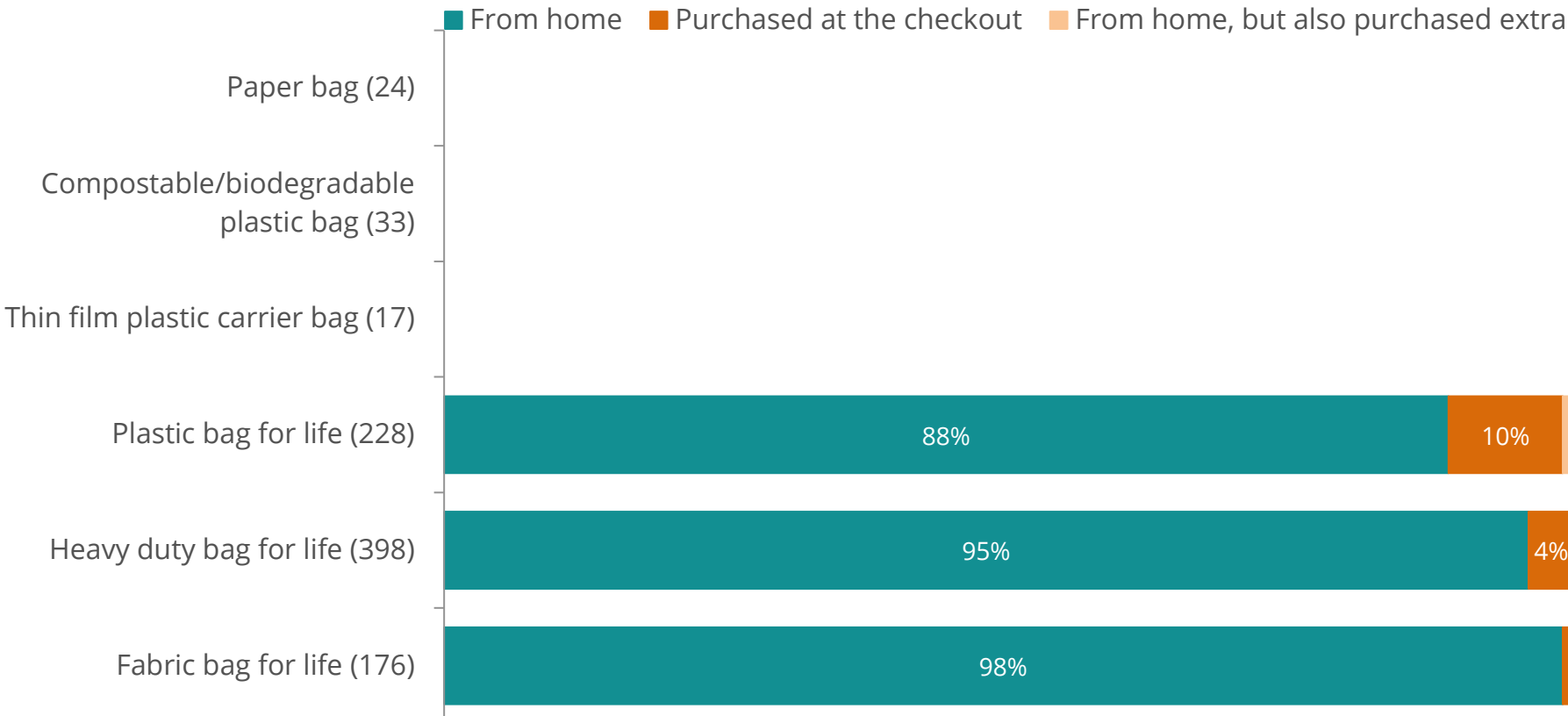
Q. What type of bags did you bring the shopping home in? NB. respondents could select multiple answers to reflect the fact they may have used a range of bag types. Therefore percentages exceed 100%



Base: Adults in Wales who answered about their recent food shopping through these kinds of shops (base sizes in brackets)

Large shop in store – bags purchased or taken from home

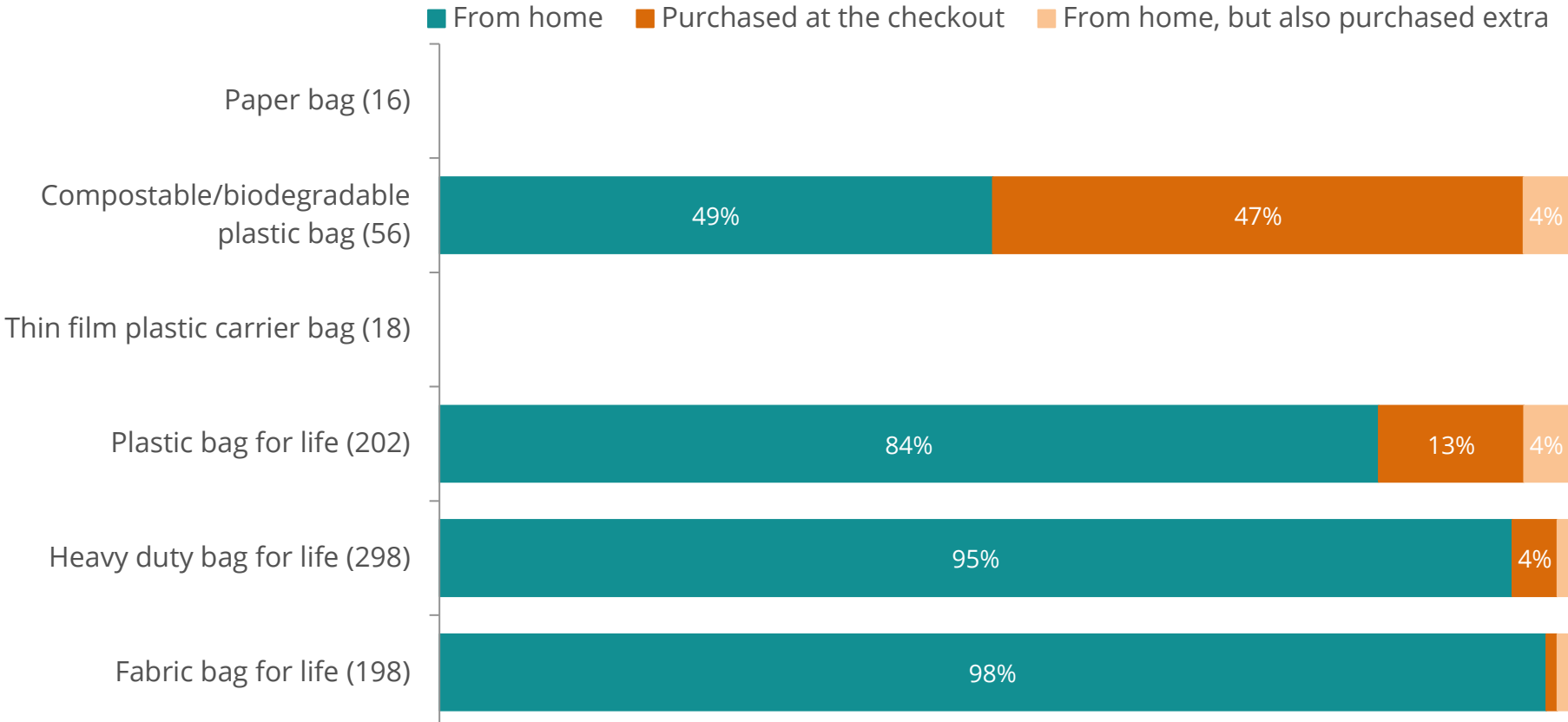
Q. Did you bring those bags with you, buy them at the supermarket or was it a mixture of the two?



Base: 604 adults in Wales answering about a recent large food shop in store

Smaller shop in store – bags purchased or taken from home

Q. Did you bring those bags with you, buy them at the supermarket or was it a mixture of the two?

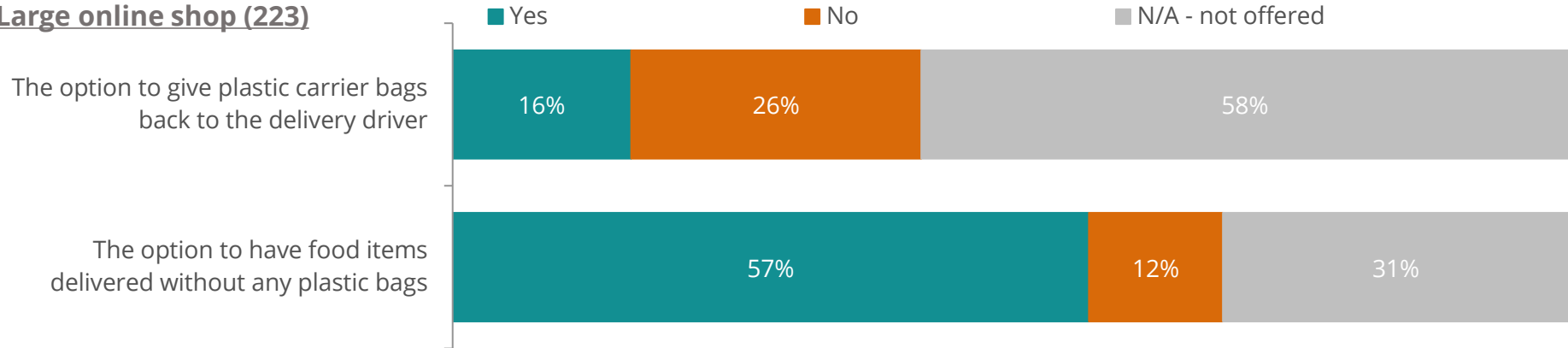


Base: 743 Adults in Wales answering about a recent smaller food shop in store

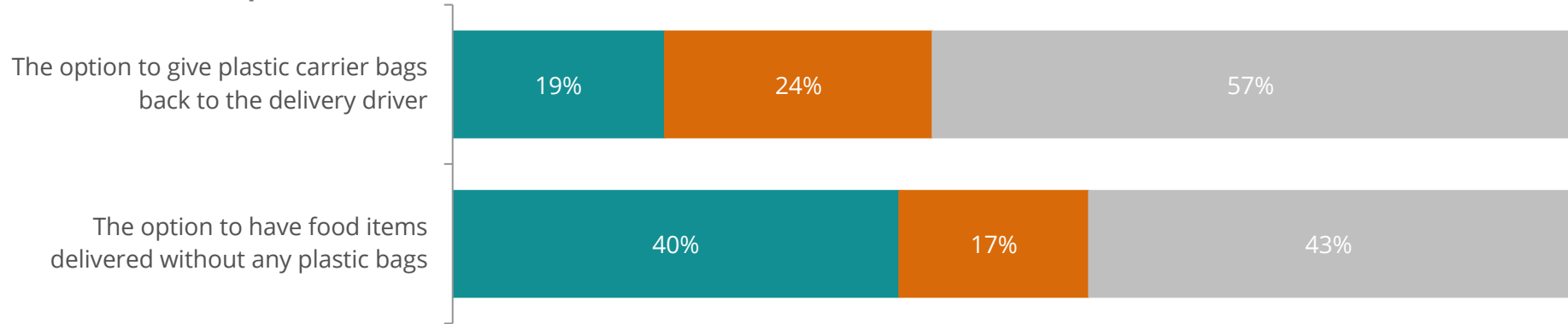
Online shops for home delivery

Q. When the order was delivered to your home, did you take up any of the following options which are sometimes offered?

Large online shop (223)



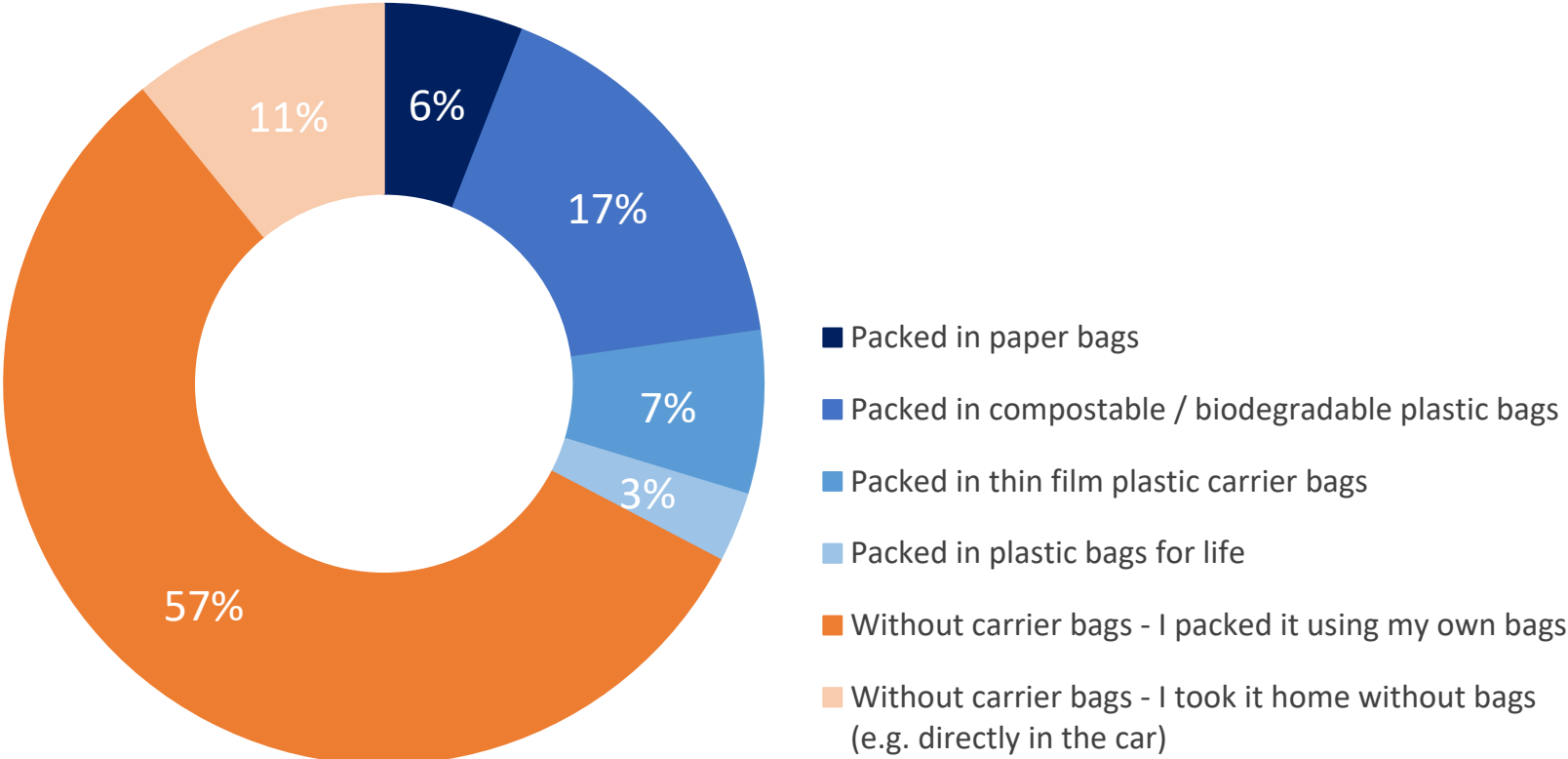
Smaller online shop (76)



Base: Adults in Wales who answered about a recent online order for home delivery (base sizes in brackets)

Click and collect shops

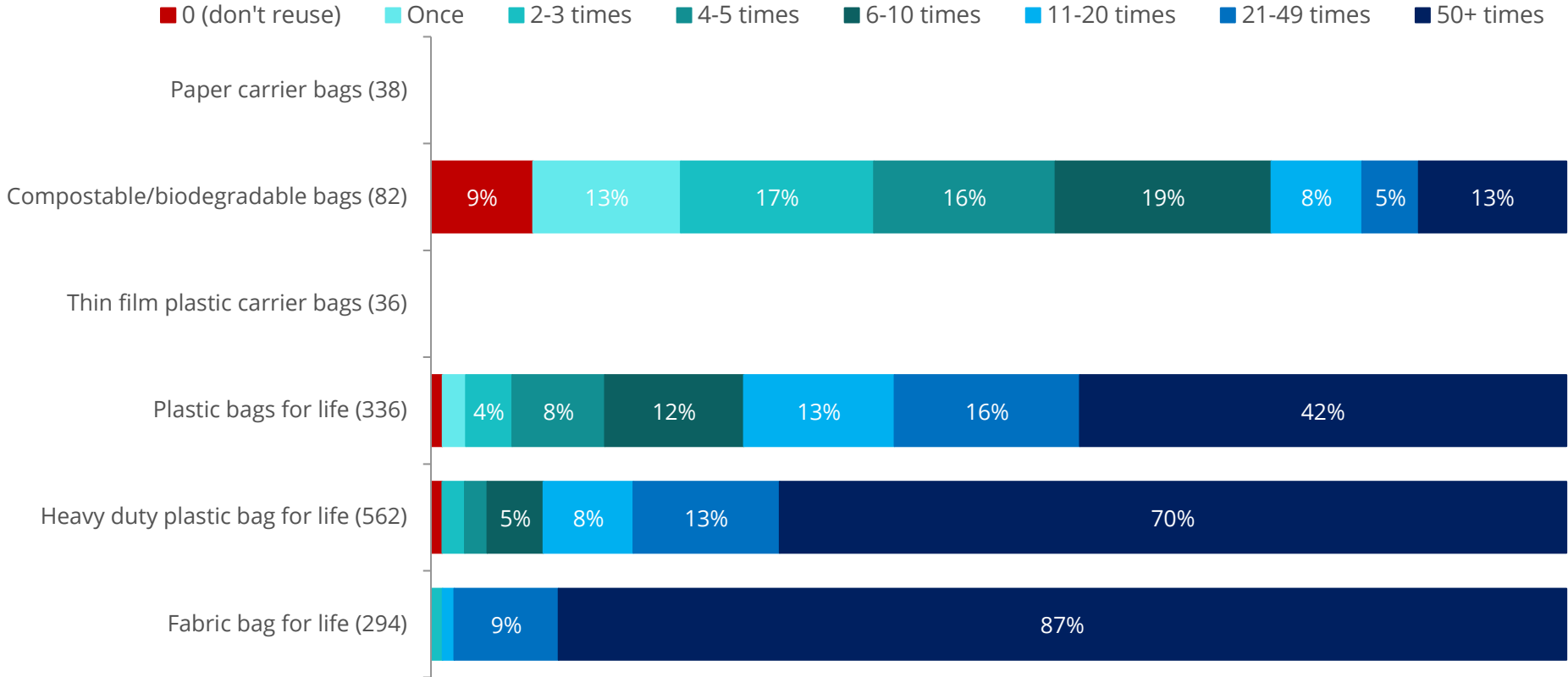
Q. When you collected the order, was the shop packed in carrier bags for you to collect, or bag-less?



Base: 73 adults in Wales who answered about a recent click and collect food shop

Number of re-uses for different bag types

Q. How many times do you typically re-use the following types of bag before they are disposed of?

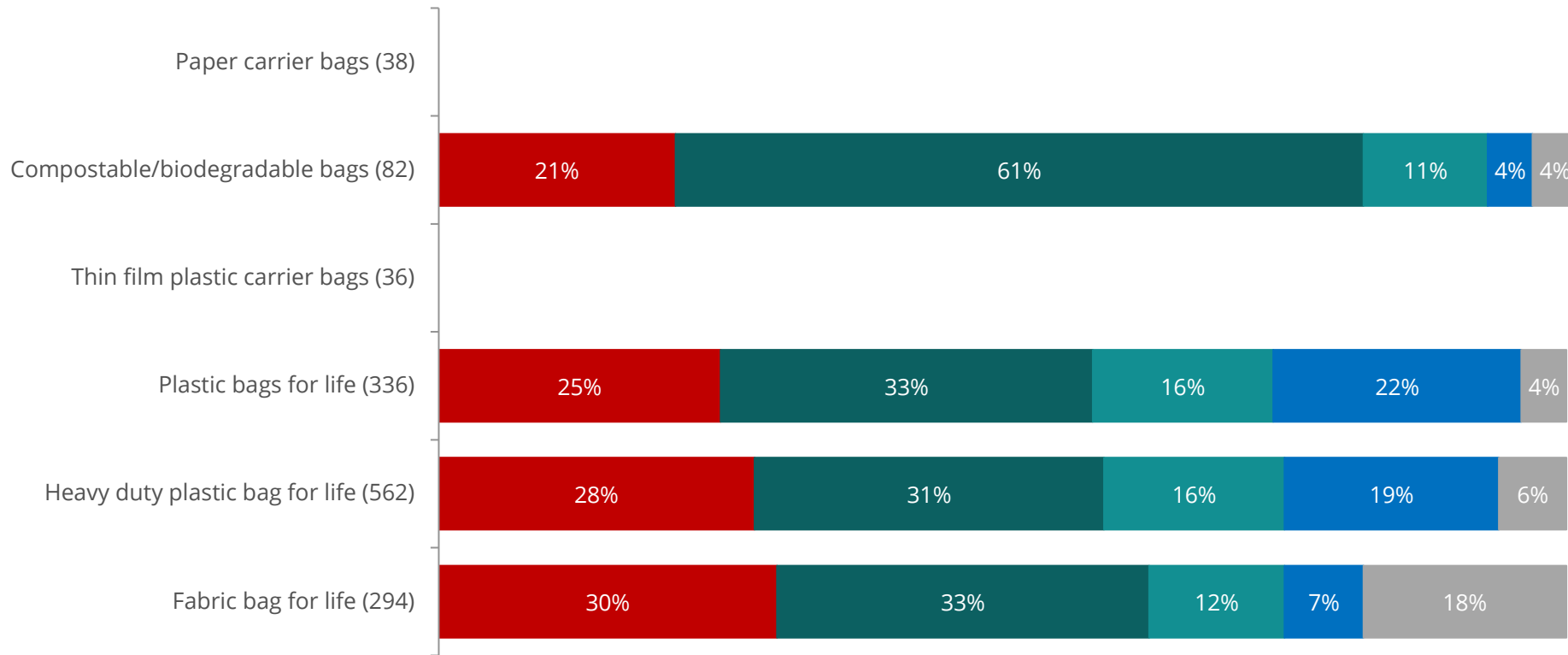


Base: Adults in Wales who used each type of bag during their recent shops in the past two weeks (base sizes in brackets)

Disposal routes for different bag types

Q. When a bag of this type wears out or gets old, or you have more than you can use, how do you dispose of it?

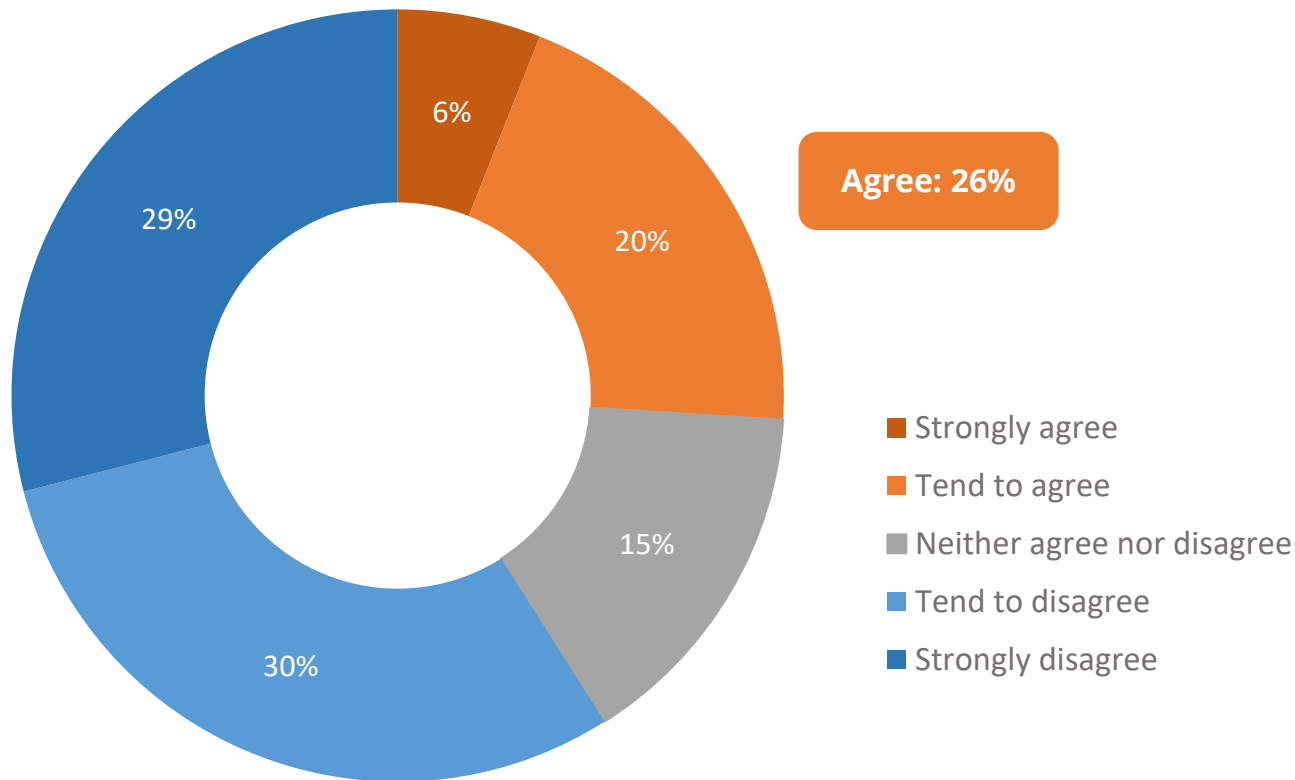
■ General rubbish ■ Recycling from home ■ Recycling away from home ■ Return to the retailer/swap for a new one ■ Something else



Base: Adults in Wales who used each type of bag during their recent shops in the past two weeks (base sizes in brackets)

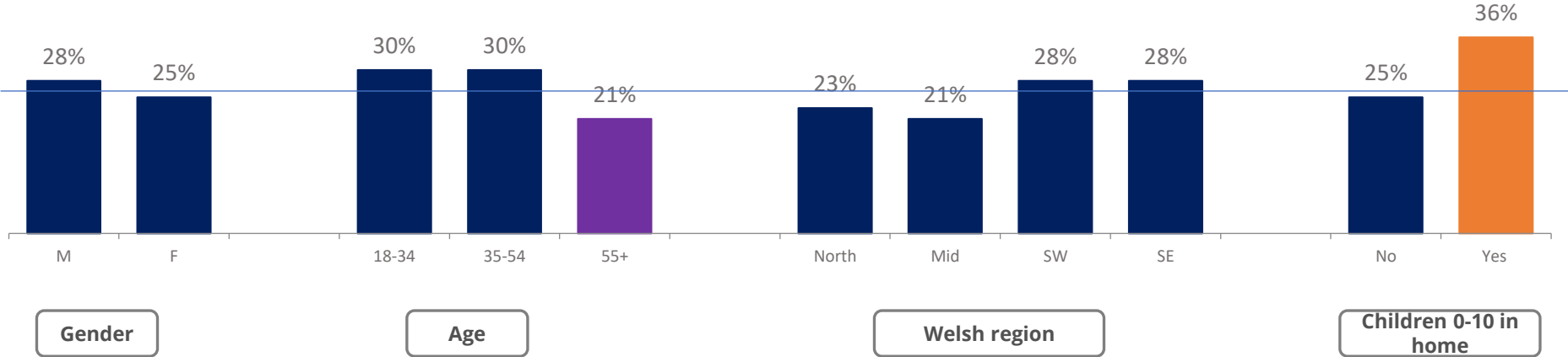
Bags for life not in use

Q. Here are some statements people have made about themselves. Please select how much you agree or disagree with each one: I have a lot of "Bags for Life" stored at home that I rarely use



Differences by sub-group (1)

The graph shows the percentage of each cohort who agree they have a lot of 'bags for life' stored at home that they rarely use



Base: Adults in Wales (base sizes in brackets)

Differences by sub-group (2)

The graph shows the percentage of each cohort who agree they have a lot of 'bags for life' stored at home that they rarely use



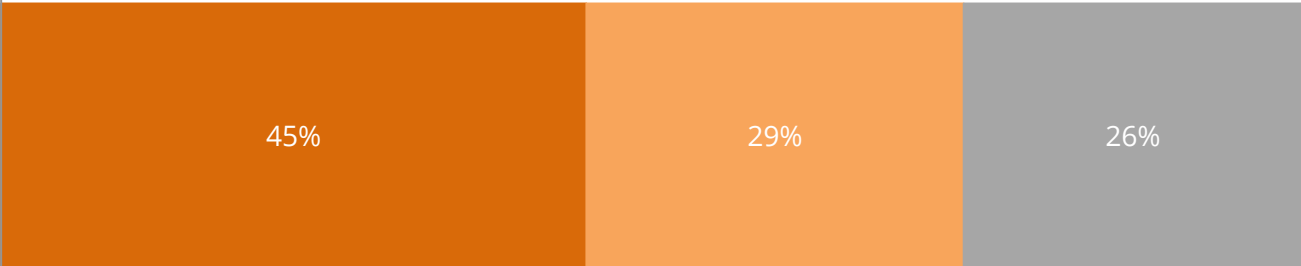
Base: Adults in Wales (base sizes in brackets)

Awareness of bag replacement/disposal

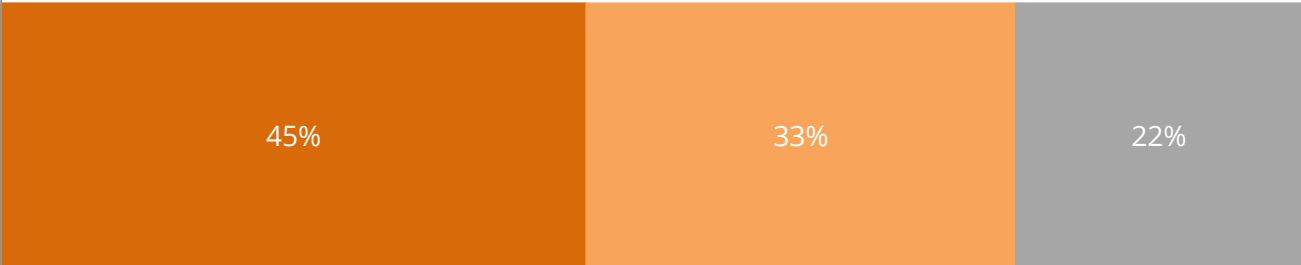
Q. For each of the following, is this something that you have heard before or are aware of?

■ Yes - definitely ■ Possibly - not completely sure ■ Not heard before

"Bags for life" can be replaced free of charge with new bags for life at any supermarket



Thin plastic carrier bags can be recycled at most supermarkets



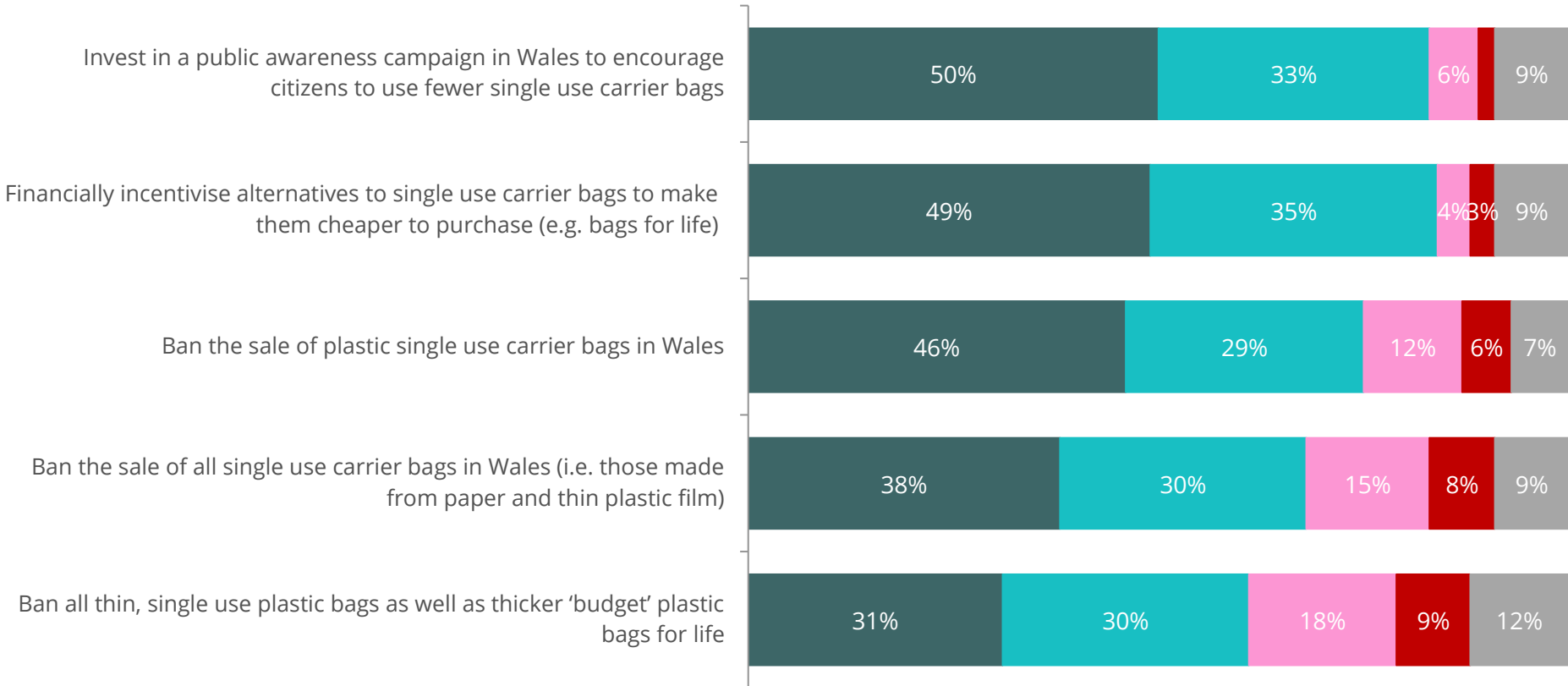
Base: 1,003 Adults in Wales

4. Views towards potential policy interventions

Views towards potential policy interventions

Q. To what extent would you be in favour or against the following interventions on single use plastic carrier bags in Wales?

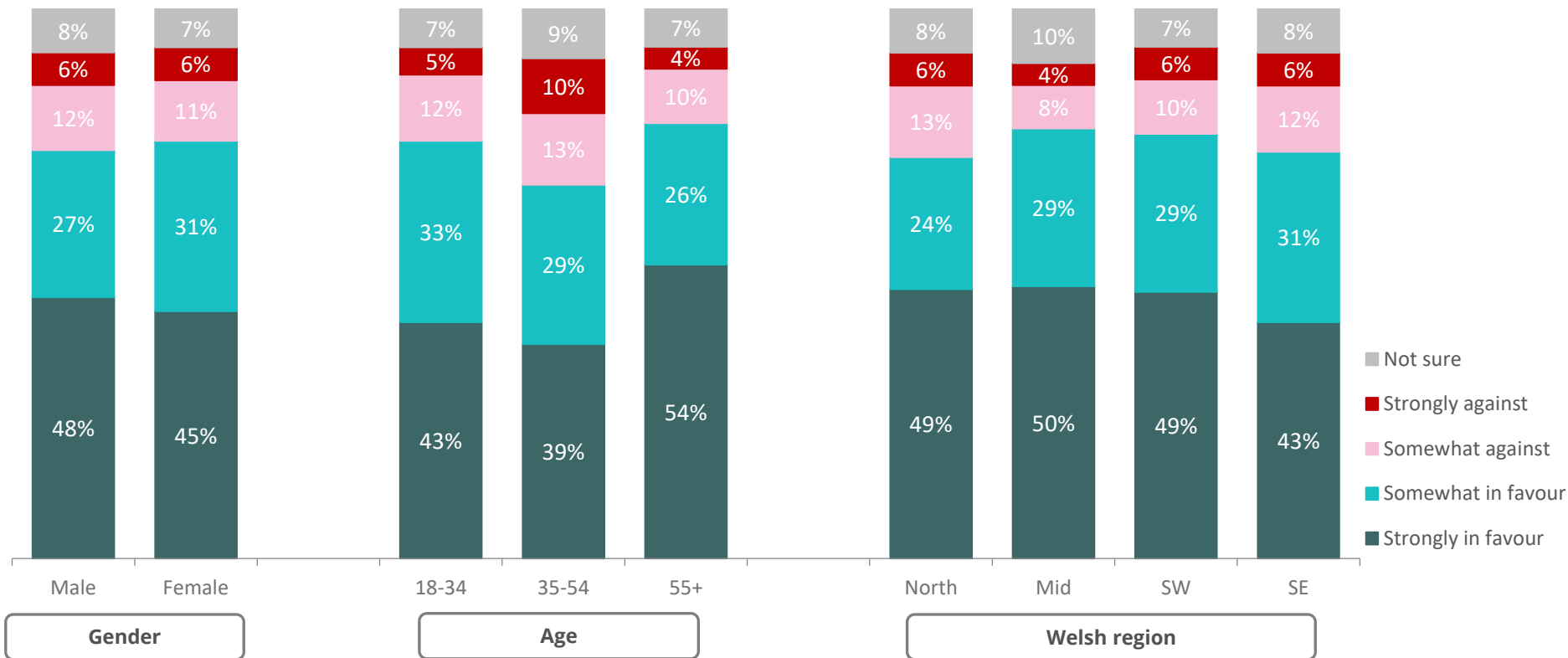
■ Strongly in favour ■ Somewhat in favour ■ Somewhat against ■ Strong against ■ Not sure



Base: 1,003 Adults in Wales

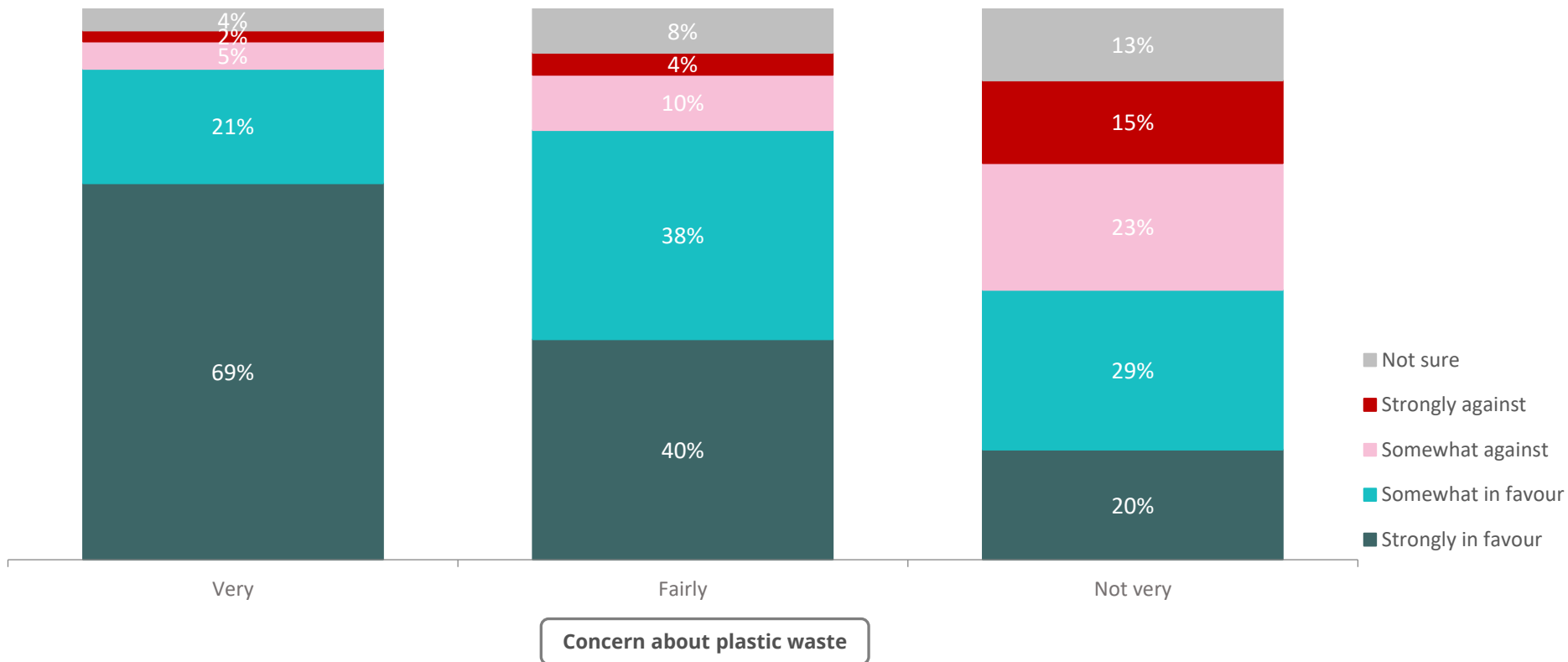
Sub-groups (1)

Q. To what extent would you be in favour or against the following interventions on single use plastic carrier bags in Wales? Ban the sale of plastic single use carrier bags in Wales



Sub-groups (2)

Q. To what extent would you be in favour or against the following interventions on single use plastic carrier bags in Wales? Ban the sale of plastic single use carrier bags in Wales



Summary of key findings: Bags



Summary and implications

1. In-store food shops dominate; whereas small online shops and “click & collect” remain niche (at the level of Wales as a whole)
2. The majority of food shops are undertaken in large supermarkets, even smaller food shops.
3. Most food shops are planned; the exception being smaller food shops which are evenly balanced between planned small shops and spontaneous shops.
4. Bags for life dominate, and the vast majority of these are reported to be brought from (even for smaller food shops). The exception is compostable/biodegradable bags which are frequently purchased at the check out, particularly for unplanned small shops.
5. Reported numbers of re-use are very high, particularly for heavy duty plastic bags for life and fabric bags for life.
6. A significant proportion of all bags are put in the home recycling collection; there is less frequent swapping of bags for new ones in store.
7. There are some knowledge gaps, with less than half certain they can switch an old bag for life for a new one, or can recycle thin plastic bags at front of store.
8. There is broad support for a range of possible policy interventions. For example, three quarters strongly or somewhat support a ban on single use plastic bags.