

Appendix A



**LONDON
RECYCLES**

 London recycles

'One bin is rubbish'



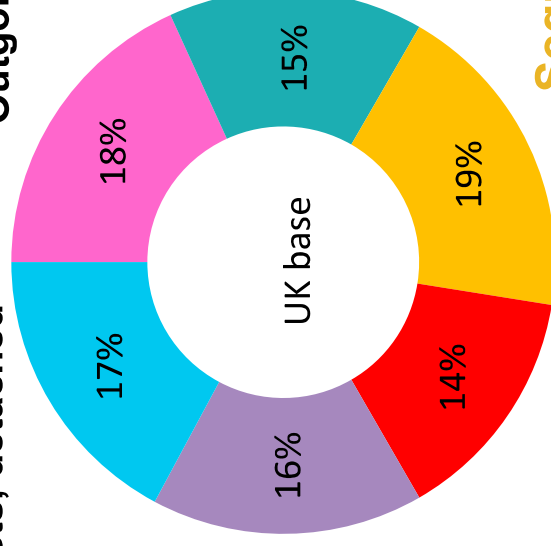
Recycling attitudes – audience segmentation

Segment 6: Indifferent

Followers, conventional, conformists, detached

Segment 1: What's in it for me?

Outgoing, consumerist, cynical, fatalistic



Segment 5: Global ideals

Confident, principled, idealistic, responsible

Segment 2: Nice & neighbourly

Practical, local, unfussy, conventional

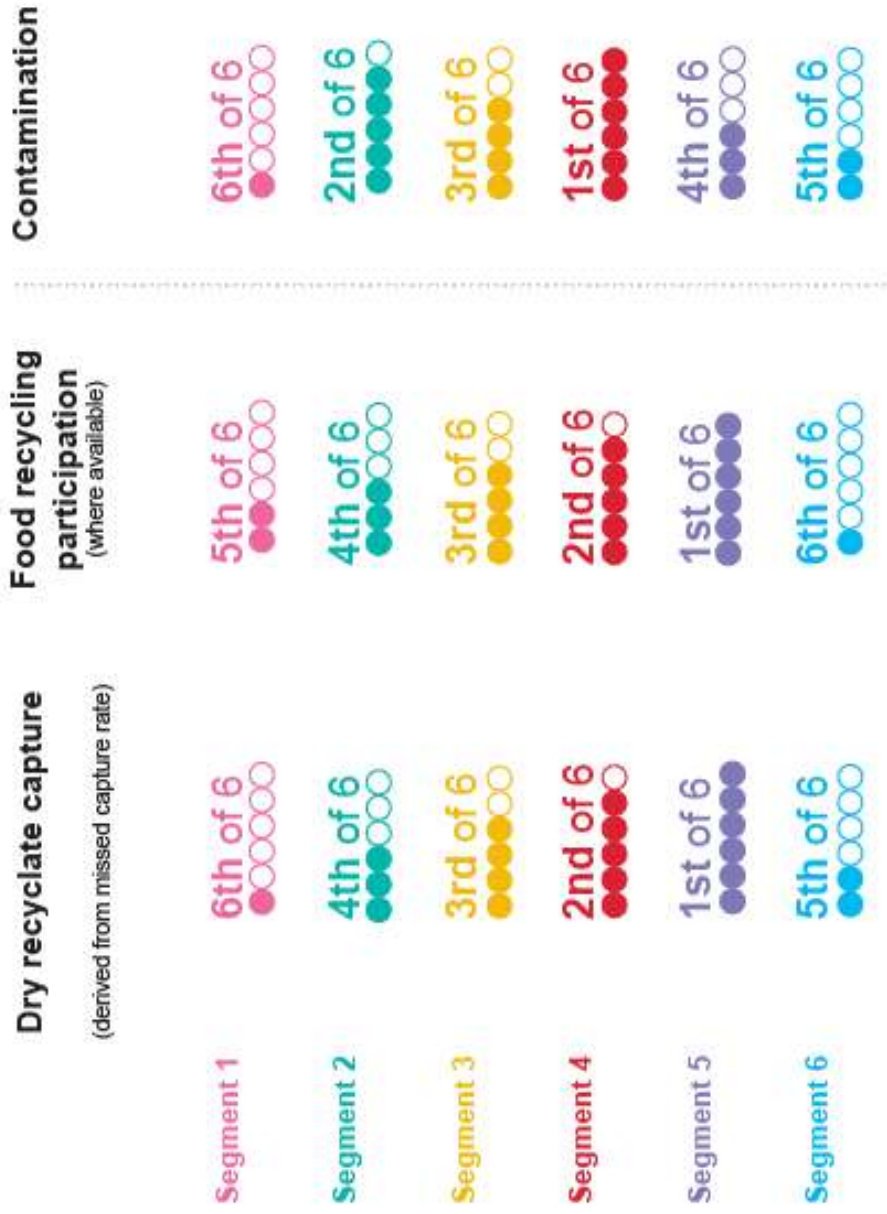
Segment 4: Rule abiders

Careful, considered, respectful, small horizons

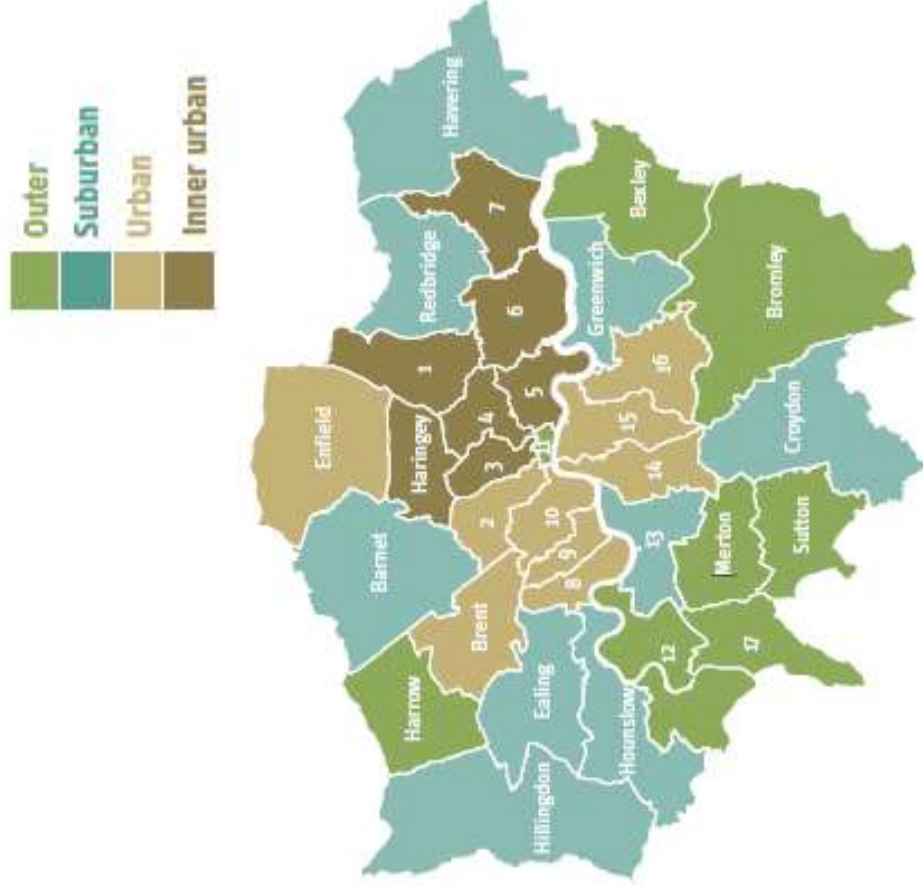
Segment 3: Conscientious community

Balance, integrity, reflective, responsible

How well do they recycle?



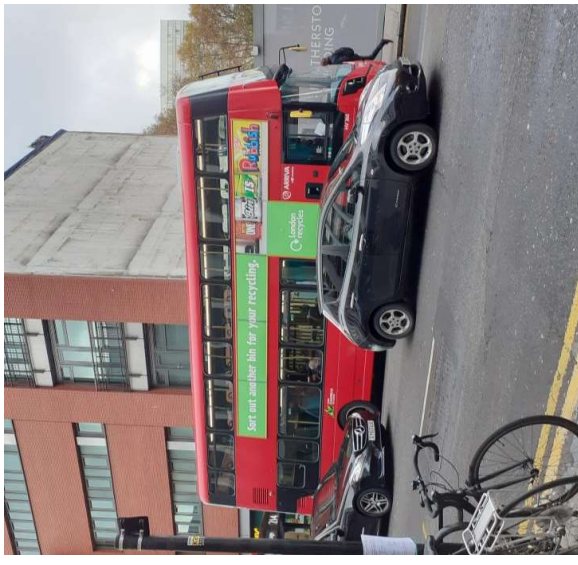
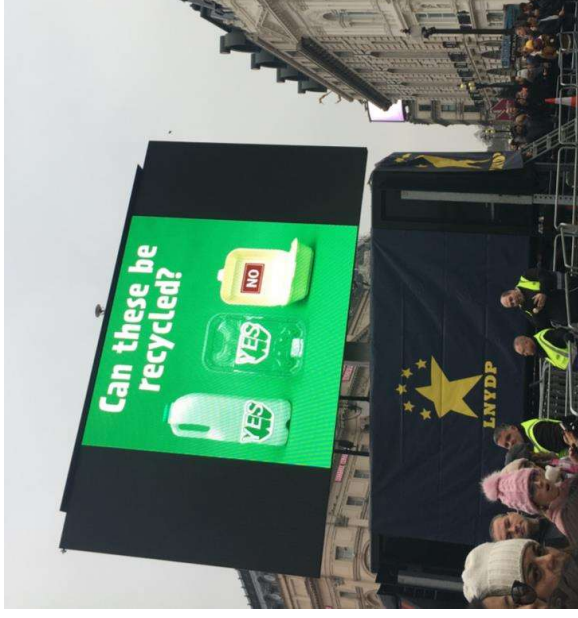
London's profile



The 3-year plan: 2017- 2020



Out of home advertising



Print advertising – year 1



**London.
Evening
Standard**



BALANCE

STYLIST



LWARB



Social advertising – priming posts year 1

Recycle for London
Sponsored (demo) - €

Like Page

You're better than this. Sort out another bin to put all your recycling in.



Recycle for London
Environmental Service

Like Comment Share

216 Comments · 2.9K others

Learn More

Recycle for London
Sponsored (demo) - €

Like Page

Connoisseurs reckon that wine tastes better if you have a recycling bin to put the bottle in afterwards, not your kitchen floor



Recycle for London
Environmental Service

Like Comment Share

58 Comments · 3.4K others

Learn More

Recycle for London
Sponsored (demo) - €

Like Page

"Cue emotional violin" Wrapping paper and empty boxes deserve a better home than a black bag this Christmas. Make sure you've got a recycling bin to put them in.



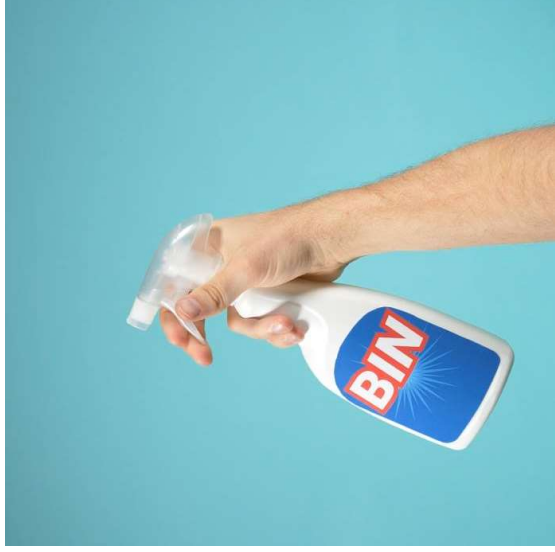
Recycle for London
Environmental Service

Like Comment Share

135 Comments · 256 Shares

Learn More

Social advertising – priming posts year 2 & 3



Social advertising – education posts year 1

Recycle for London Sponsored

When you eventually take all your Christmas cards down make sure the sparkle bits don't end up in your recycling - the glitter makes them non-recyclable.



veg peelings

Food waste | Recycle for London

Want to recycle your food waste but not sure if you can? Check our recycling locator tool to find out if you can recycle it at home how to recycle food waste by your council has given you a kitchen caddy you can recycle your food waste Food waste.

RECYCLEFORLONDON.COM

1 Like 0 Comment 0 Share

14 of 14

Chronological

18 comments

Recycle for London Sponsored

BECOME AN EVEN BETTER person this January, start recycling all your fruit peel in your food waste caddy instead of chucking it. This is a must-read for getting started.



Fruit scraps

Fruit peelings | Recycle for London

recycleforlondon.com

RECYCLEFORLONDON.COM

190 52 Comments 49 Shares

Like Comment Share

Recycle for London Sponsored

Plastic in today's? Where? Don't get your brow in a twist. Whether they're old ketchup bottles or not your ketchup are still recyclable. So make pop the cap off and take to the curbside.



tea bags

Tea bags | Recycle for London

Did you know you can recycle your ketchup your ketchup has given you a kitchen caddy even your tea bags and other grounds can go in there! You can also recycle a lot of other household items. Recycle for London. Recycle for London.

RECYCLEFORLONDON.COM

210 reactions 80 Comments 68 Shares

Like Comment Share

Recycle for London Sponsored

Unsure about whether you can recycle your used cleaning products? Well, sure you can! Recycle for London has a list of products you can recycle. So make sure you recycle your cleaning products. Recycle for London.



bleach bottles

Bleach Bottles Recycle

Did you know bleach bottles are recyclable? Check our recycling locator to find out where to recycle them near you. Here to recycle bleach bottles sure they're empty! If you have a lot of bleach bottles, the store will be happy and this extra weight will help them.

RECYCLEFORLONDON.COM

547 reactions 91 Comments 139 Shares

Like Comment Share

Recycle for London Sponsored

Almost all kinds of paper and card are recyclable but if you're ever unsure, we've put together a handy guide for you on our site.



cardboard & paper

Cardboard packaging | Recycle for London

Cardboard is widely recycled. Check our recycling locator to see where you can recycle it today! How to recycle the many types of cardboard we use at home are recycled cardboard, which is used for parcels, and cardboard (used to package and transport goods).

RECYCLEFORLONDON.COM

1 Like 0 Comment 0 Share

18 comments

Recycle for London Sponsored

Don't just bin your bones. Putting them in a food waste caddy means they can be recycled. Here's a guide to how it's done.



chicken bones

Meat bones | Recycle for London

recycleforlondon.com

RECYCLEFORLONDON.COM

321 143 Comments 123 Shares

Like Comment Share

Recycle for London Sponsored

Most people dispose of their plastic milk bottles sensibly but there are still some queries out there. Rise them. Recycle them. Just like this.



plastics

Milk bottles | Recycle for London

Milk bottles are widely recycled everywhere. Here's a reminder of what to do with your plastic milk bottles. Recycle for London. Recycle for London.

RECYCLEFORLONDON.COM

565 reactions 84 Comments 111 Shares

Like Comment Share

Recycle for London Sponsored

Yes, you can recycle your aerosol cans. No, the world won't explode. Here's how it's done.



aerosols

Aerosols | Recycle for London

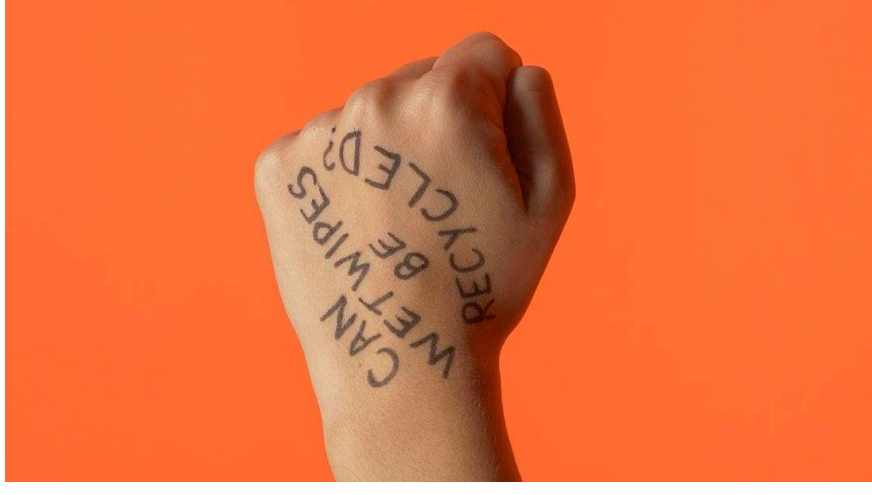
recycleforlondon.com

RECYCLEFORLONDON.COM

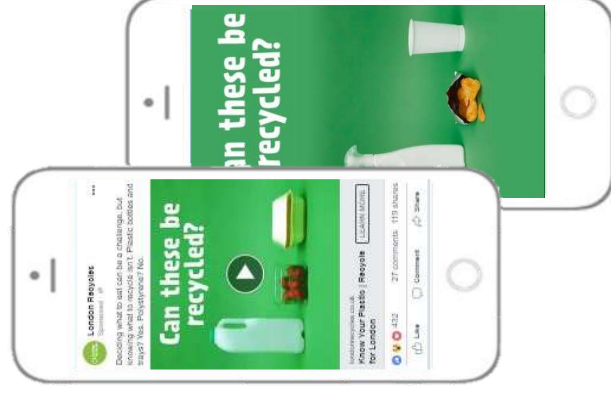
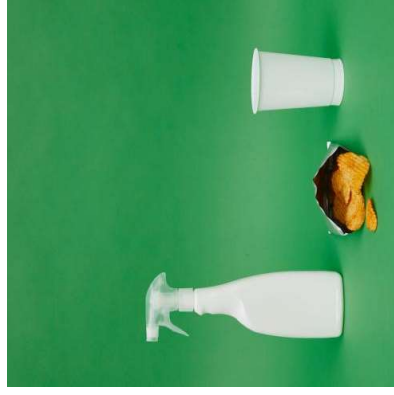
793 68 Comments 181 Shares

Like Comment Share

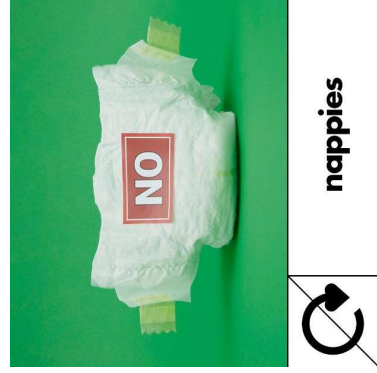
Social advertising – education posts years 2 and 3



Plastics campaign – years 2 and 3



Our visual identity - examples



Content partnership – year 1

BuzzFeed News Videos Quizzes Tasty More Search

This Is How Much Rubbish London Produces

London creates huge amounts of rubbish, and yet the city has some of the lowest recycling rates in the UK. Thankfully, you can help by adding a recycling bin to your home — because one bin is rubbish.

Posted on December 1, 2017, at 4:43 p.m.

London Recycles Promoted Content

1. Every year, London authorities collect the equivalent of 1,500 50-metre swimming pools full of waste from the capital.

Latest Posts From London Recycles

- This Is How Much Rubbish London Produces
- 15 Simple Hacks For People Who Never Recycle But Know They Should
- Only True Friends To The Earth Will Get 9/12 On This Quiz



BuzzFeed News Videos Quizzes Tasty More Search

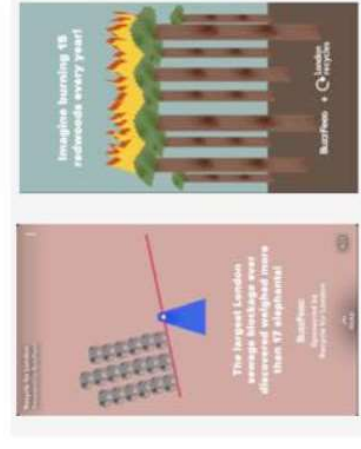
Only A True Recycling Expert Can Get 9/12 On This Quiz

Have you *bin* recycling properly? HA.

Posted on November 1, 2017, at 5:32 a.m.

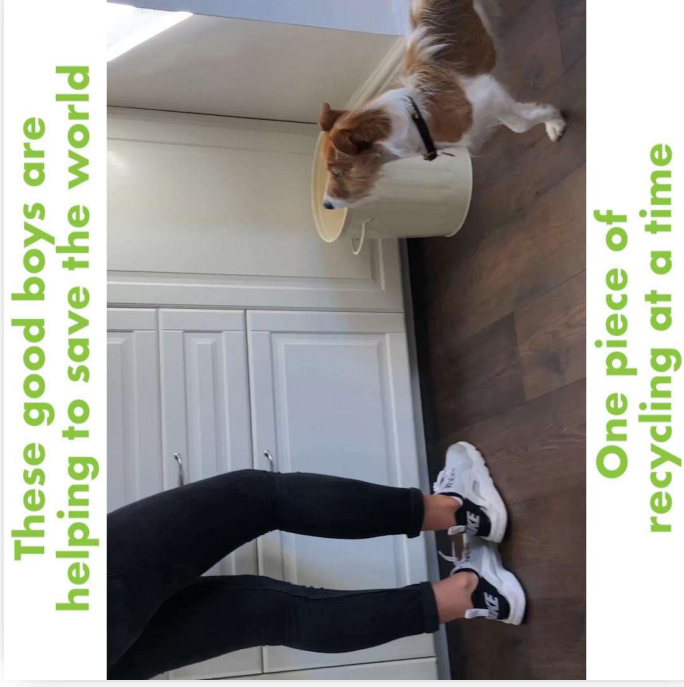
London Recycles Promoted Content

Facebook Twitter Email More



Content partnership – year 2

JOE Media



EVEN A DOG CAN DO IT

RUBE GOLDBERG

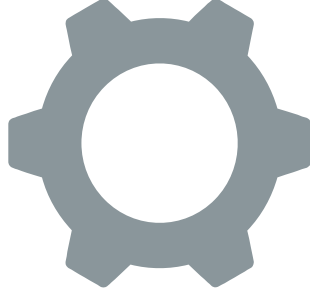
Influencers – year 2



What were our KPIs?

Brand building

- Increase reach, awareness and recall of the Recycle for London and OBIR campaigns



Behaviour change

- Encourage Londoners to get or 'hack' a second bin
- Contribute to an increase in the amount of London's household waste recycled

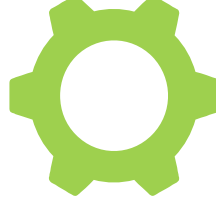


Social norming

- Change perceptions and behaviours amongst harder to reach audiences by making recycling a social norm

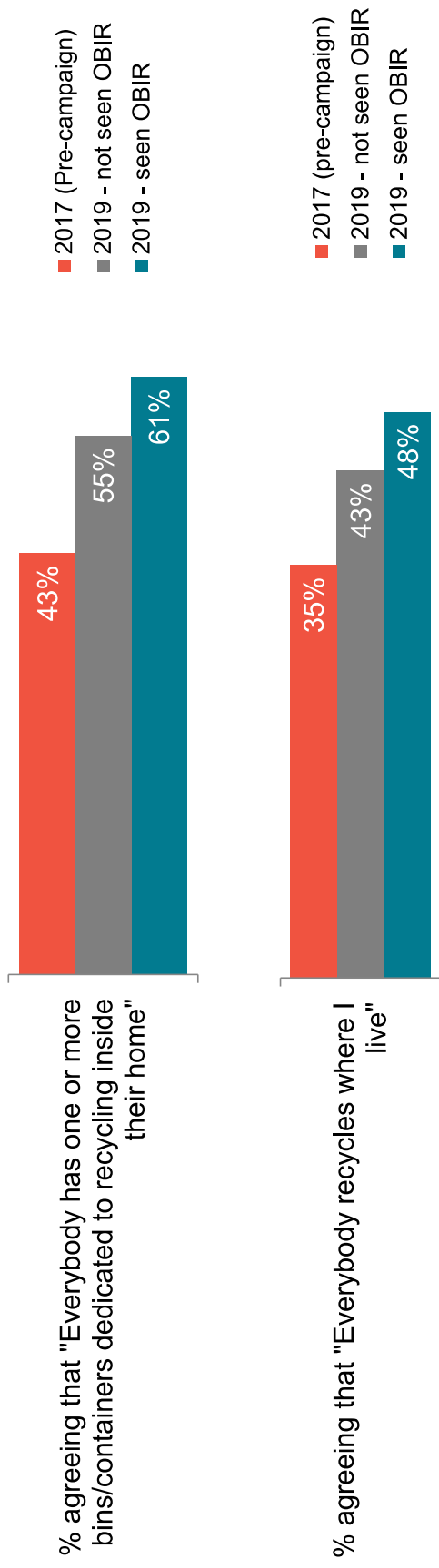
Confidence- and motivation-building

- Provide Londoners with the information they need to increase confidence levels about what can and can't be recycled at home



Brand building & social norming

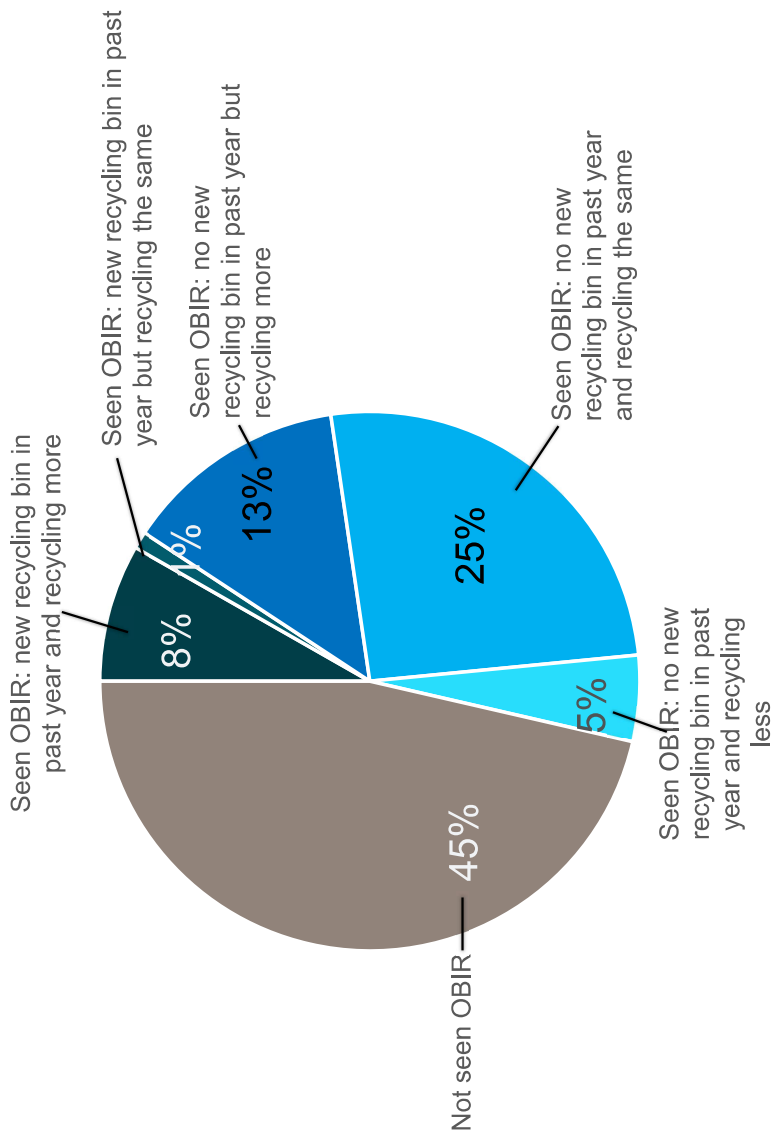
- We reached 55% of Londoners last year with our campaign



Behaviour change

The percentage of Londoners who have seen our campaign, got a new bin and are recycling more has gone from 1% in year 1 to 8% in year 2

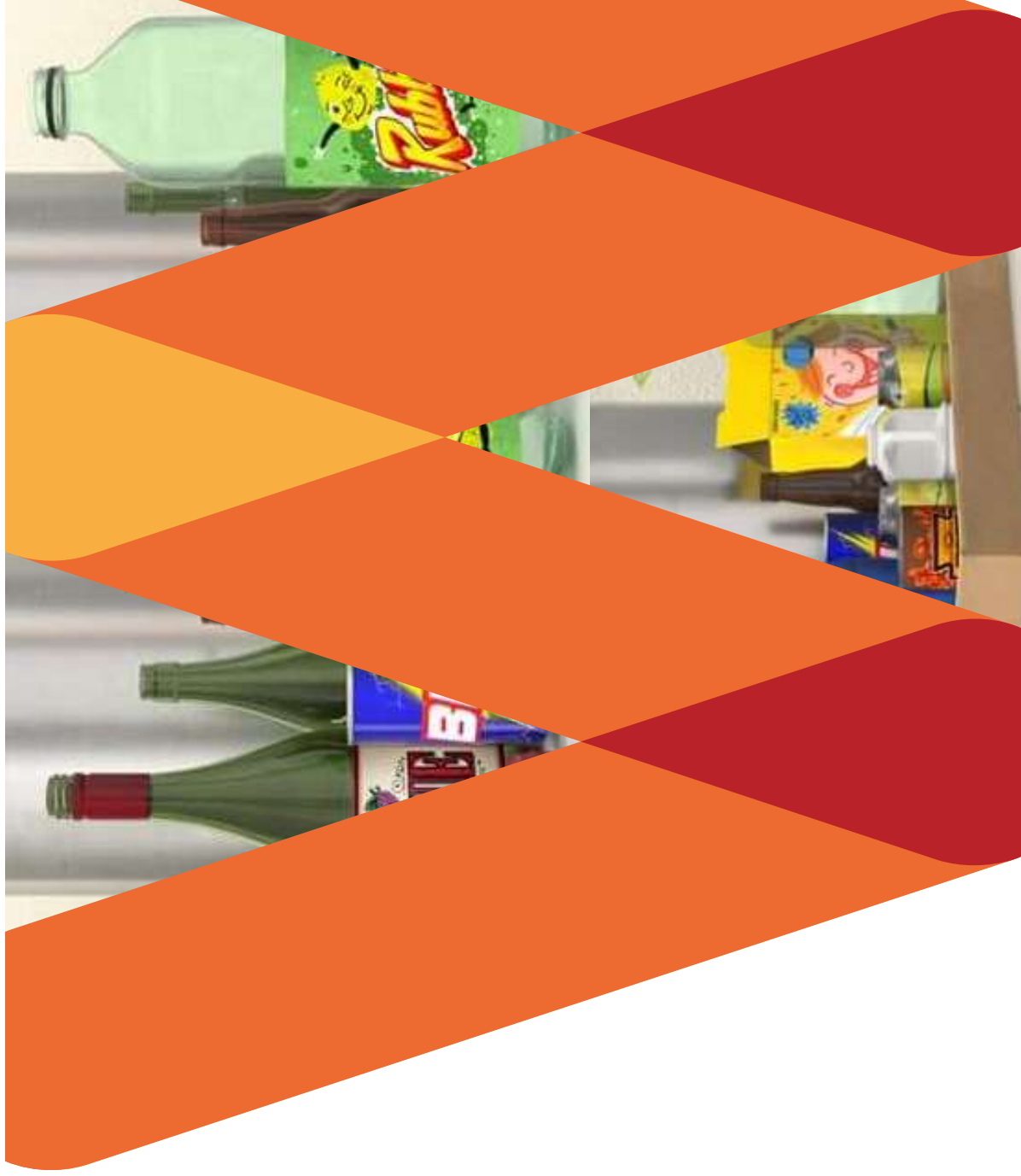
The percentage of Londoners who have seen our campaign and are recycling more is now 21%



Appendix B1



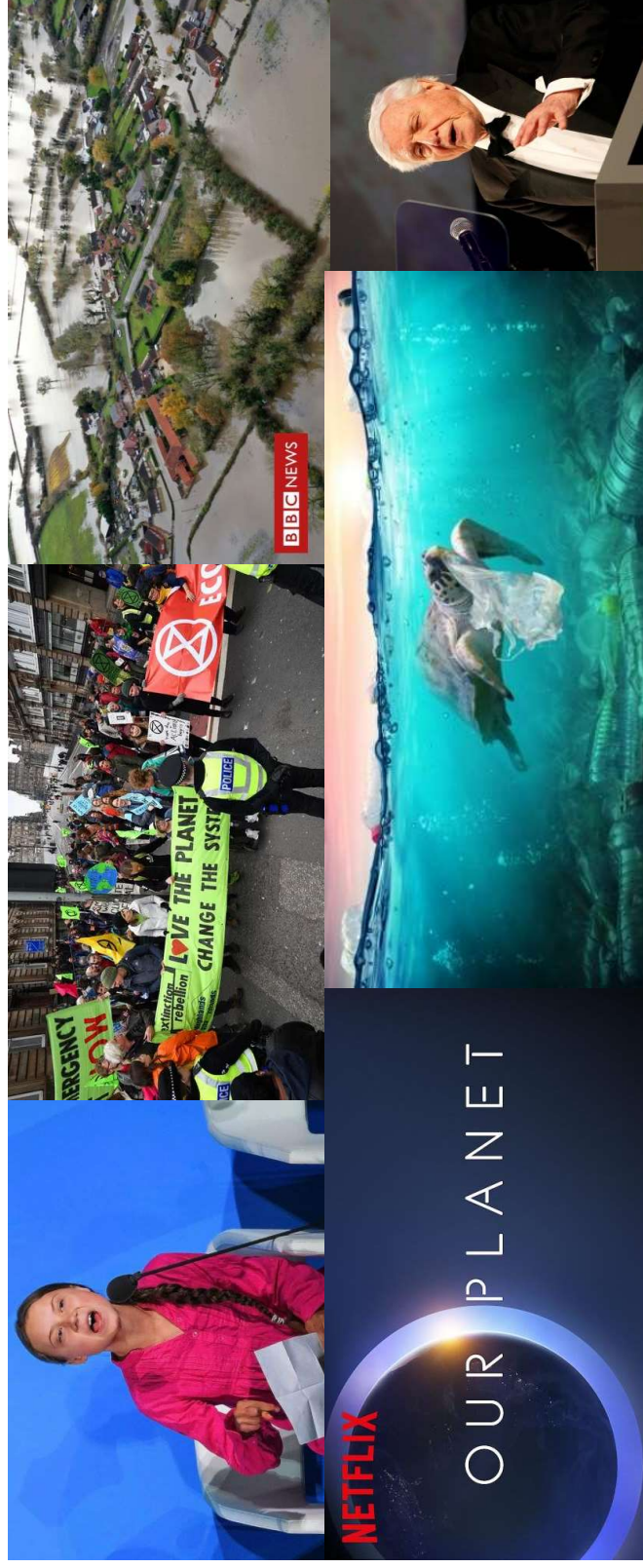
2019/2020 PCA



WHAT WE WILL COVER TODAY

- Context setting
 - The way consumers behaviour is changing
 - How brands our changing behaviours to keep up with user demand
- Recap of what we did and why
- Media results and recommendations moving forward

ENVIRONMENTAL STORIES DOMINATE TODAY'S CULTURE

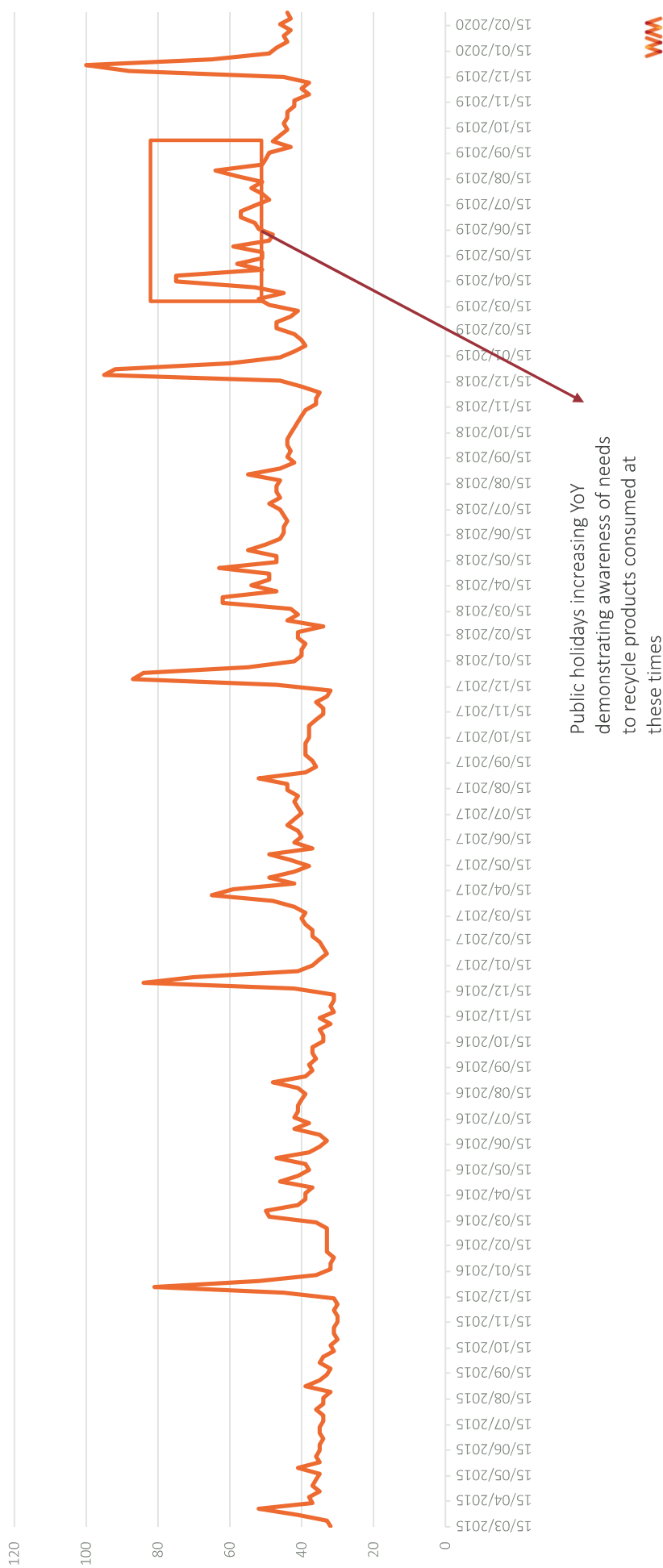


MANY CONSUMER BEHAVIOURS HAVE RESULTED FROM THIS



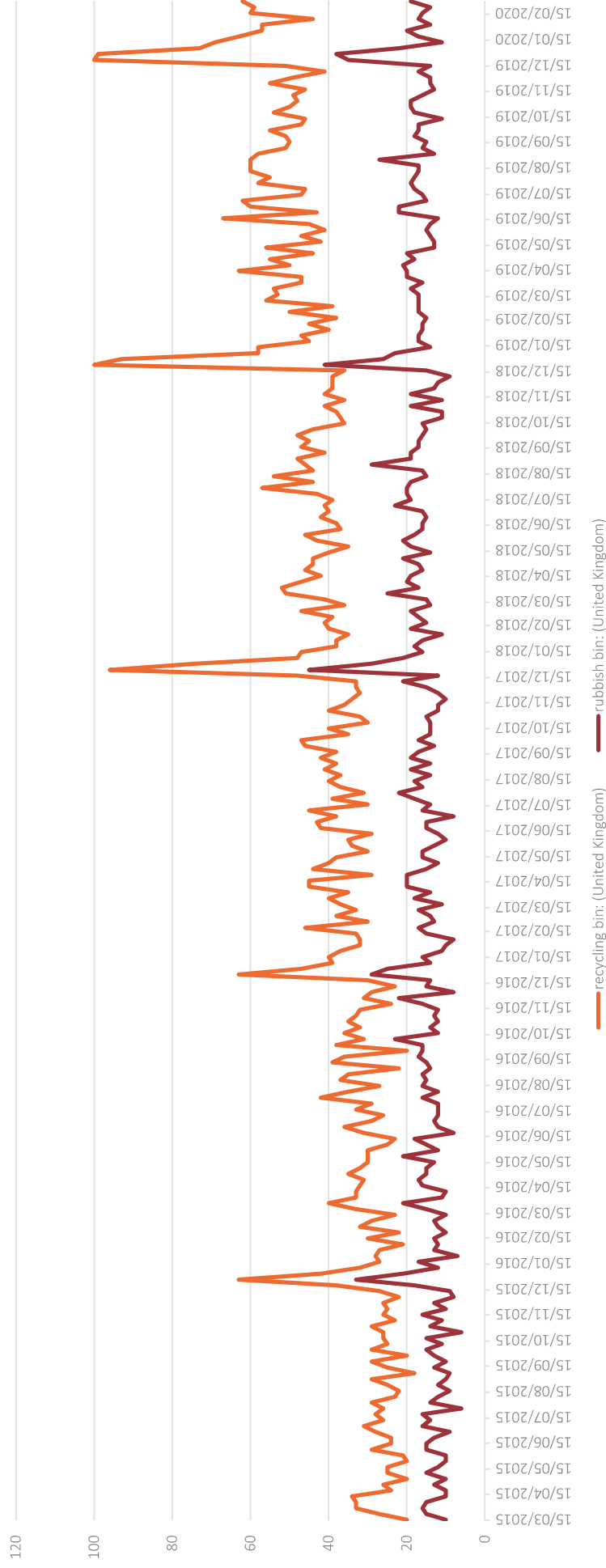
SEARCHES FOR RECYCLING CONTINUE TO RISE AND PEAK AROUND PUBLIC HOLIDAYS

recycling: (United Kingdom)

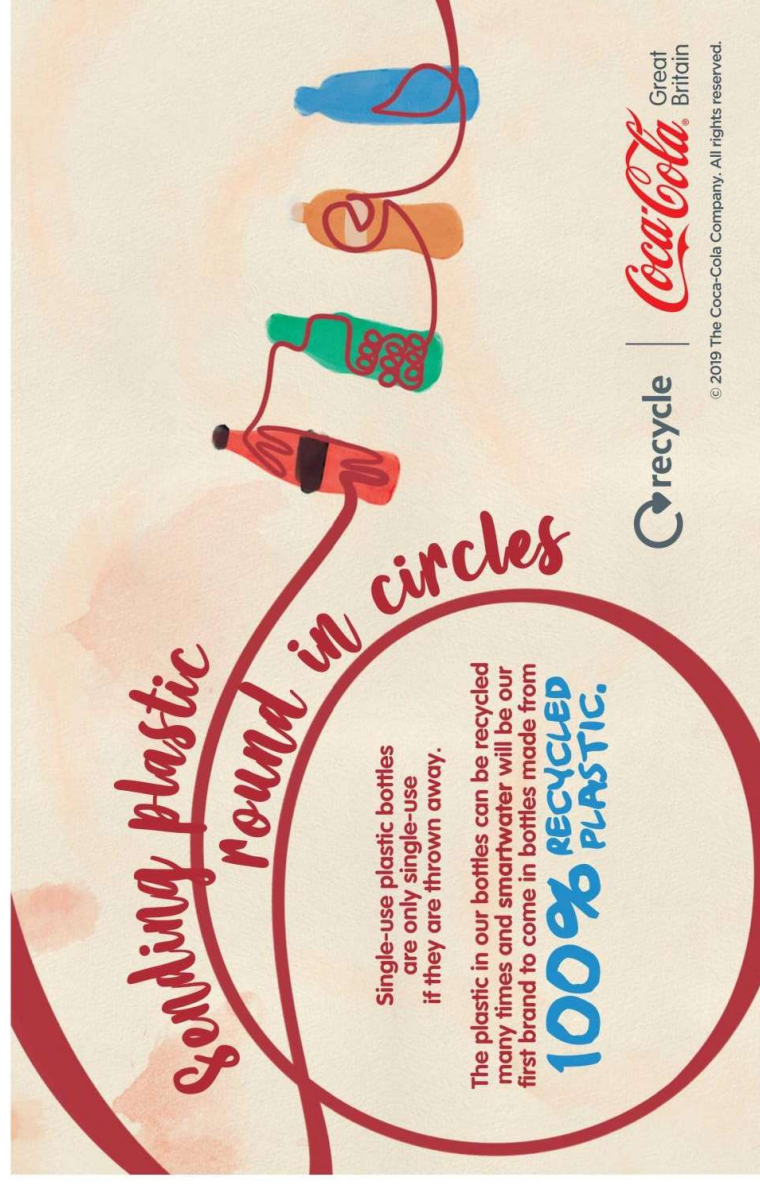


SEARCHING FOR RECYCLING PRODUCTS CONTINUES TO INCREASE

Google Trends – Searches for recycling bins vs. rubbish bins



BRANDS ARE BECOMING INCREASINGLY RESPONSIVE TO CONSUMER EXPECTATIONS



Case study of Coca Cola who spent £100ks on recycling campaign across Outdoor, Print and Digital

**WHAT WE
DID AND
WHY**

YOUR BRIEF TO US

KEY BUSINESS TASK

Get London recycling!
Continue to embed OBIR messaging as a social norm amongst Londoners

HOW MARKETING WILL GET US THERE

PRIME: Drive reach and awareness of OBIR to embed as a social norm in priority boroughs
EDUCATE priority audience about specific items that can/can't be recycled, encouraging positive recycling behaviours

STRATEGIC FRAMEWORK

GET Londoners who are ambivalent/apathetic about recycling
IO be encouraged into action
BY embedding the social norm around owning more than one bin

TARGET AUDIENCE

London: M/F 18-45
Priority Boroughs: Hackney, Haringey, Waltham Forest, Newham, Barking & Dagenham, Lambeth, Southwark, Islington, Camden Westminster, Enfield, Hammersmith & Fulham, Kensington & Chelsea, Lewisham, Tower Hamlets, Brent

WHAT DO YOU WANT CONSUMERS TO DO POST CAMPAIGN?

Take action by using more than one bin for their recycling

BUDGET

PRIME: £50k
EDUCATE £28k

2018 LEARNINGS

2018 LEARNINGS SHOW US THAT THERE IS AN OPPORTUNITY TO REVIEW OUR PHASING IN 2019

Key Learnings

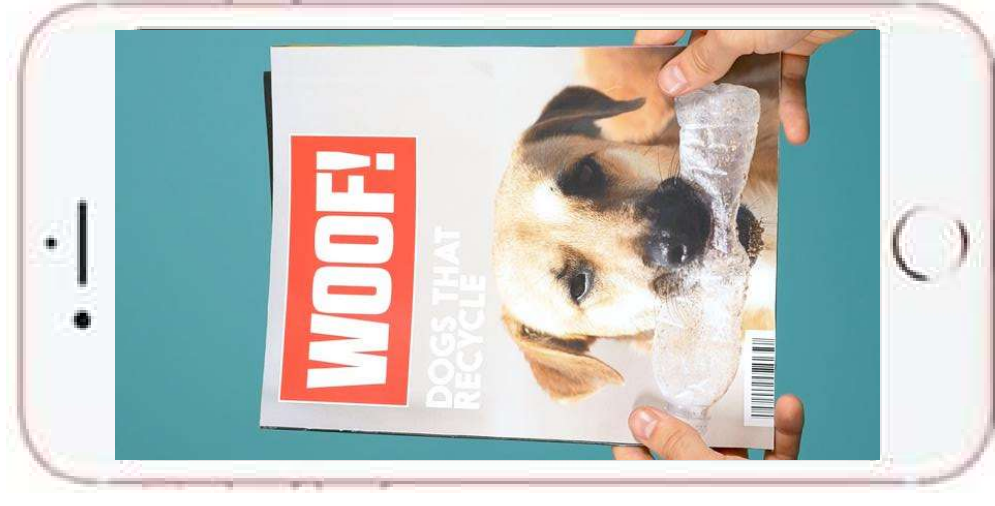
- Across all phases, our targeting and buying optimisations meant we were able to **secure a significantly lower CPM than forecasted**, despite activating at highly competitive times. As a result, **we were able to drive fantastic scale** for the overall campaign
- Activating in multiple bursts for Priming and Education meant **we limited our reach opportunity**, vs activating in fewer bursts with more investment
- We saw our strongest video engagement on Snapchat overall, whilst CPV and CPCV delivered at our most cost-effective rates of £0.01 and £0.02. However, Facebook and Instagram activity saw highly cost-effective CPV and CPCV results too, at £0.01 and £0.03 respectively



2018 LEARNINGS SHOW US THAT THERE IS AN OPPORTUNITY TO REVIEW OUR PHASING IN 2019

Recommendations

- **Consolidate budget into fewer bursts:** setting fewer bursts live will maximise our opportunity to drive scale for Recycle for London. We also have the potential to unlock research opportunities to measure message impact and intent to recycle.
- **Run activity on combined placements:** supporting ads across Facebook and Instagram within one campaign set-up will drive even stronger results for future campaigns
- **Review channel choice:** our learnings show us that whilst Snapchat was strong for driving views, Instagram and Facebook remain key for driving scale. We could therefore look to activate Snapchat for our education messaging only, consolidating our priming budget to Facebook to drive impact



SUMMARISING OUR 2 ROLES OF MEDIA IN 2019

PRIMING

PRIMARY ROLE

- Drive awareness of the One Bin Is Rubbish message at scale to our London audience

WHAT

- Video posts optimised towards awareness
- Bursts of OOH to drive broadcast reach in relevant places

HOW

- Targeting 18-45 Y/Os living in priority boroughs
- A Brand Lift Study will measure uplifts in brand awareness and intent to recycle

WHY

- This approach will ensure we drive brand awareness at scale, whilst delivering our message at tactically relevant times

EDUCATION

PRIMARY ROLE

- Educate our London audience with media focusing on driving action and video engagement

WHAT

- Social ads optimised towards views
- Assets delivered when recycling interest peaks

HOW

- Targeting 18-45 Y/Os living in priority boroughs
- Additional targeting to those who engaged with the priming burst

WHY

- Balancing Facebook's strength as an action driving platform with the strong video engagement we saw in 2018 on Snapchat will drive impact to our education messaging

PRIMING

OOH WILL DRIVE SCALE FOR THE CAMPAIGN AND CAN BE TARGETED TO THE

WHAT

- Drive awareness with high reaching, frequency controlled bursts, maximising impact.

HOW

- 4x bursts across Supersides and T-Side formats in key boroughs throughout London

WHY

- The range of formats drive extended reach – due to the positions on the buses and bus routes that formats are placed the mix of formats reach slightly different audiences
- Supersides while being more cost efficient miss out on vehicle impacts delivered by T-sides
- T-sides also drive greater impact meaning messaging is more likely to be retained



IN SOCIAL WE ACTIVATED ONE LARGE CAMPAIGN BURST VS MULTIPLE BURSTS TO DRIVE MAXIMUM IMPACT AND EFFICIENCY



WHAT

- Drive awareness with high reaching, frequency controlled bursts, maximising impact.

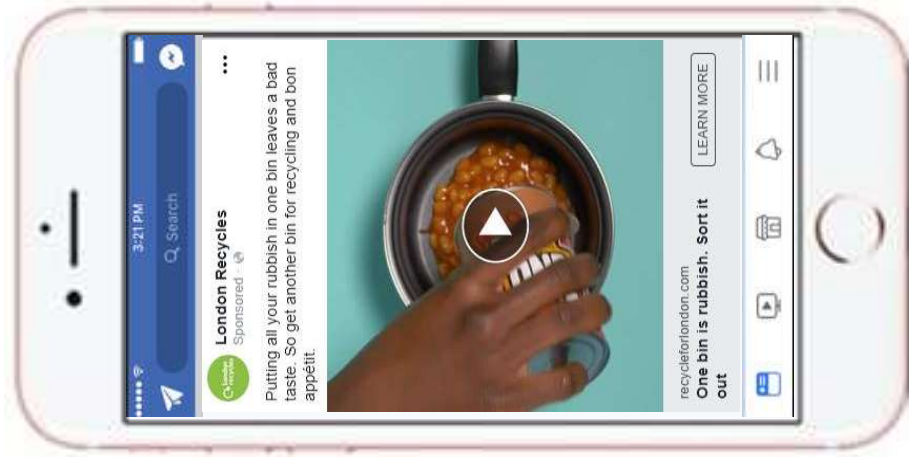
HOW

- 1x 6 week burst timed to uplifts in interest around recycling
- Targeting: M/F 18-45, priority boroughs (audience size: 4.3m)

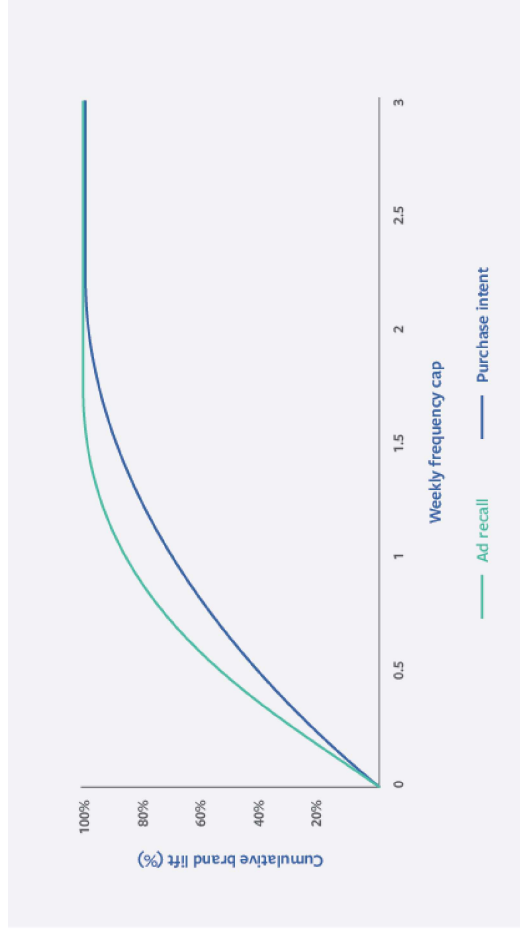
WHY

- Activating in fewer bursts in 2019 will allow us to drive more impact for Recycle for London, providing us the opportunity to reach more people with consistent continuity

Budget	£50k
Format	FB/IG in-feed & stories
KPI	Awareness
Deliverables	2.5m Reach (60%)



HIGH REACHING, FREQUENCY CONTROLLED SOCIAL CONTENT DRIVES MAXIMUM BRAND IMPACT ON FACEBOOK'S PLATFORM



Facebook IQ Source: Facebook internal analysis of 11 brand campaigns in APAC, the EU and North America, Jan 2015-Feb 2016.

A frequency cap of at least 1-2 per week will capture a substantial portion of the total potential brand impact for Recycle for London

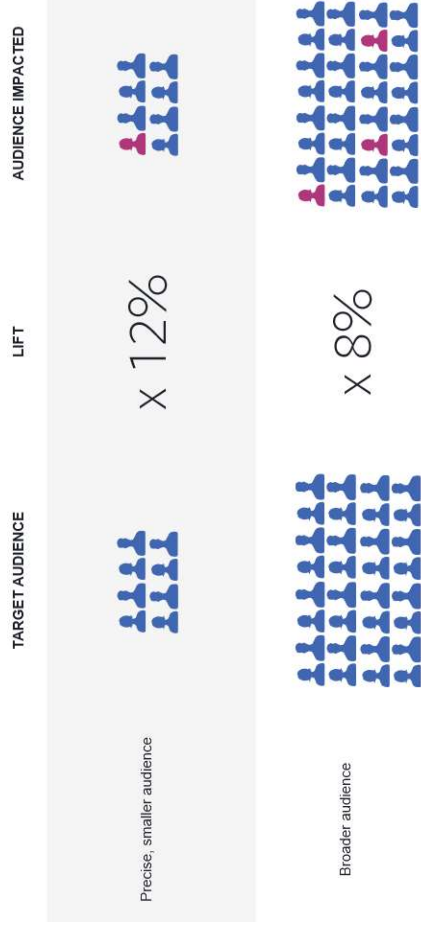
Factors to consider when planning for effective frequency



REACH MATTERS TO DRIVE AWARENESS AT SCALE FOR RECYCLE FOR LONDON



Relating reach to brand impact



Our Dilemma...

Narrowing in on a small, more precise audience	Scaling reach to a broader audience
This approach may result in a higher level of lift on people's behaviours because the message may be more relevant. The scale of the campaign, however, limits the size of the audience impacted.	This may yield a lower response rate to the advertising, but the total number of people impacted is likely much greater. When measuring this campaign against total impact, reaching a broader audience is more successful.

Key Take-Outs for Recycle for London:

- The lower reach quartile may have a more precise audience, which has more response per person, but the top reach quartile will drive more people to respond to our awareness-focused Priming activity
- Focusing on a fewer, bigger, better campaign phasing will allow is to likely drive more of a behaviour shift towards recycling in London



PRIMING DIGITAL RESULTS

PRIMING TOTAL CAMPAIGN PERFORMANCE



2.2M KPI

£3.50 planned

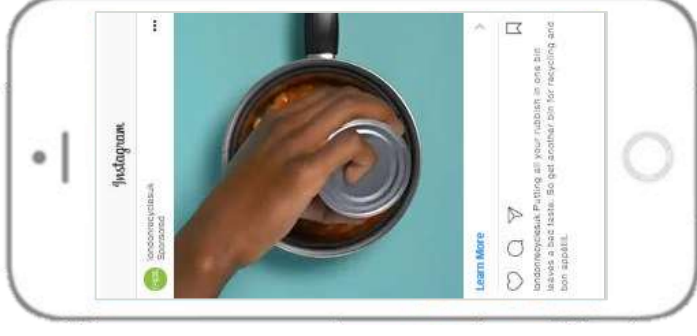
Channel	Creative	Planned CPM	Delivered CPM	Cost Difference	Planned Reach	Delivered Reach	% Delivered	Planned Views	Delivered Views	% Delivered
FB/IG	Beans	£3.50	£3.68	-£0.18	733,873	1,596,679	218%	603,368	809,019	134%
FB/IG	Magazines	£3.50	£3.68	-£0.18	733,873	1,643,518	224%	504,733	296,561	59%
FB/IG	Spray Bottle	£3.50	£3.68	-£0.18	733,873	1,426,690	194%	436,665	259,088	59%
		£3.50	£3.68	-£0.18	2,201,619	2,338,308	106%	1,548,839	1,364,668	88%

R

BUYING ALL CREATIVES TOGETHER ENABLED US TO MAXIMISE COSTS AND ACHIEVE +6% MORE REACH THAN PLANNED

Outcomes:

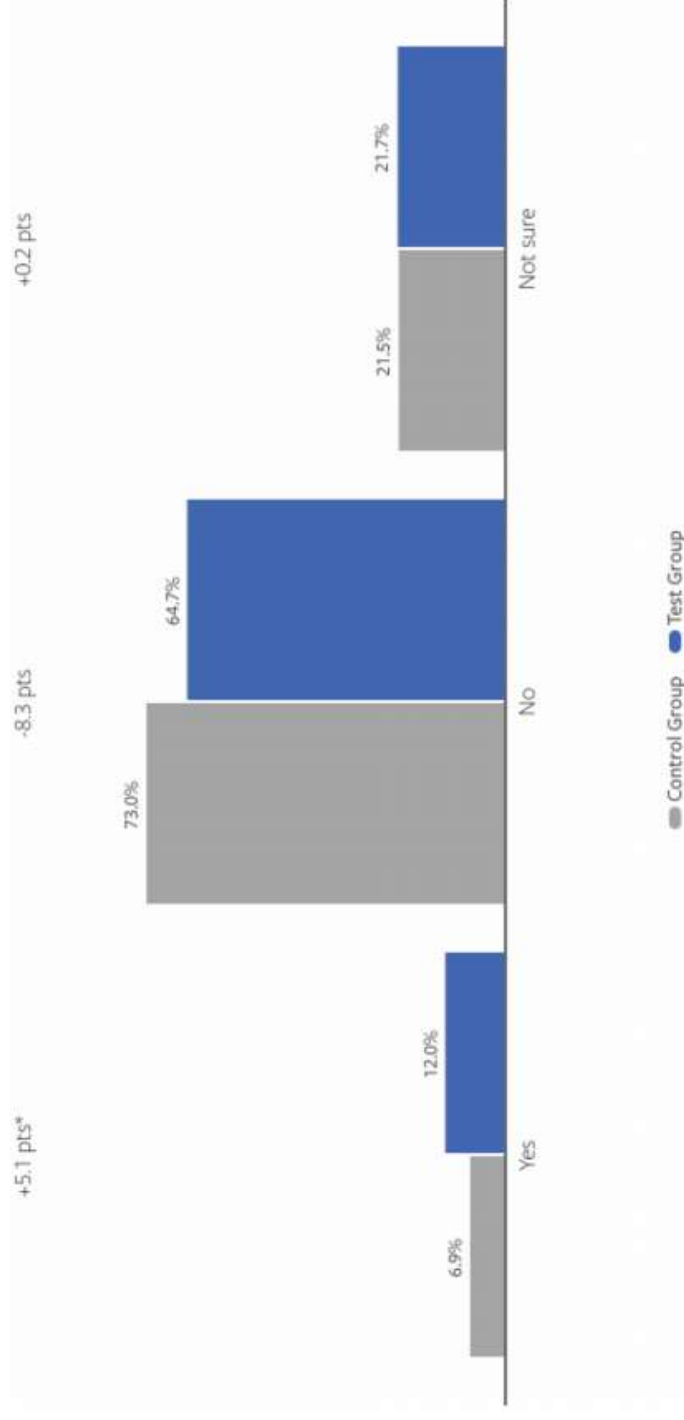
- Although the campaign CPM was more expensive than originally planned (+16p), cross-buying all creatives against the same audience allowed us to maximise our reach. We had a **2,338,308 reach** which was **+6% more reach than predicted**.
- Similar to last year, the **Beans creative drove the strongest view-rates**. It delivered a £0.02 CPV vs £0.05 for the other creatives. Beans also had a VTR of 14.5% and this was far stronger than the other creatives at 7%.
- Our overall VTR was 10.8% which was stronger than 2017/18 (9%) and 2018/19 (8.3%)



CREATIVES WERE MEMORABLE AND IMPACTFUL FOR OUR AUDIENCE

A lift was seen in ad recall for London Recycles

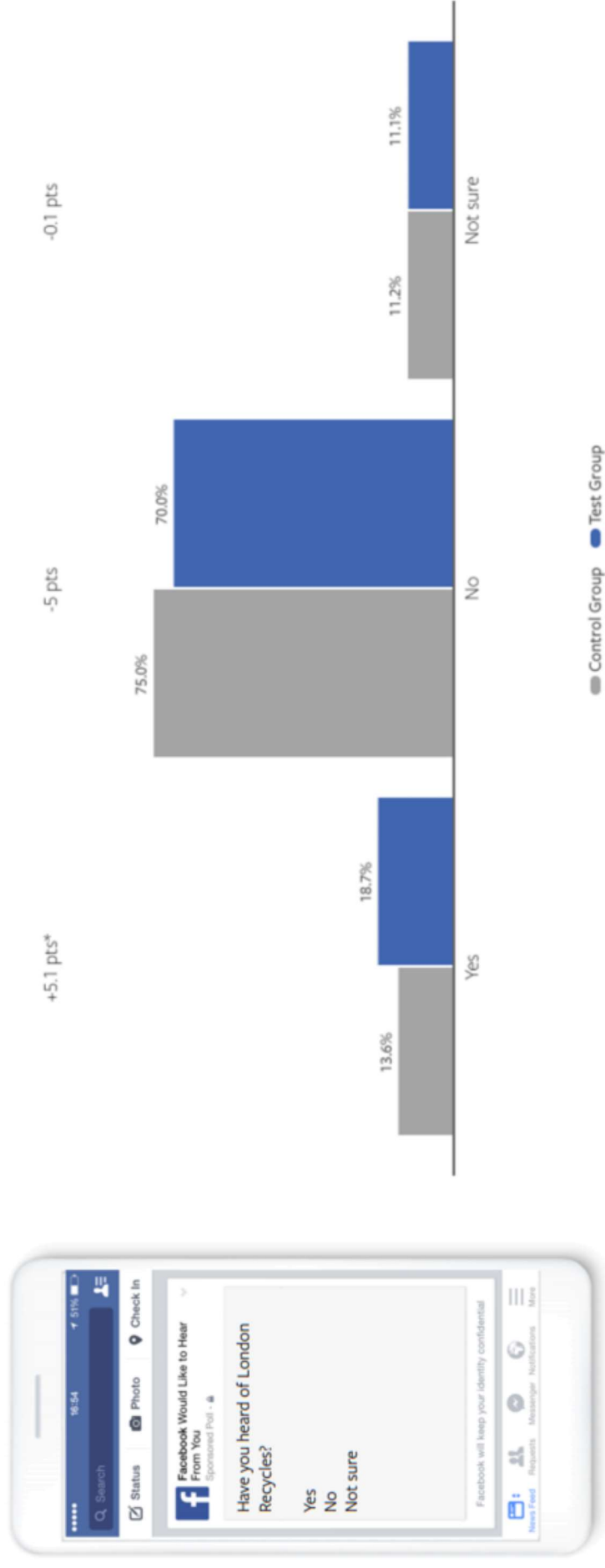
Ad recall



WE DELIVERED MUCH STRONGER RESULTS THAN OUR 2.1 PTS BENCHMARK

An uplift was seen in awareness of London Recycles

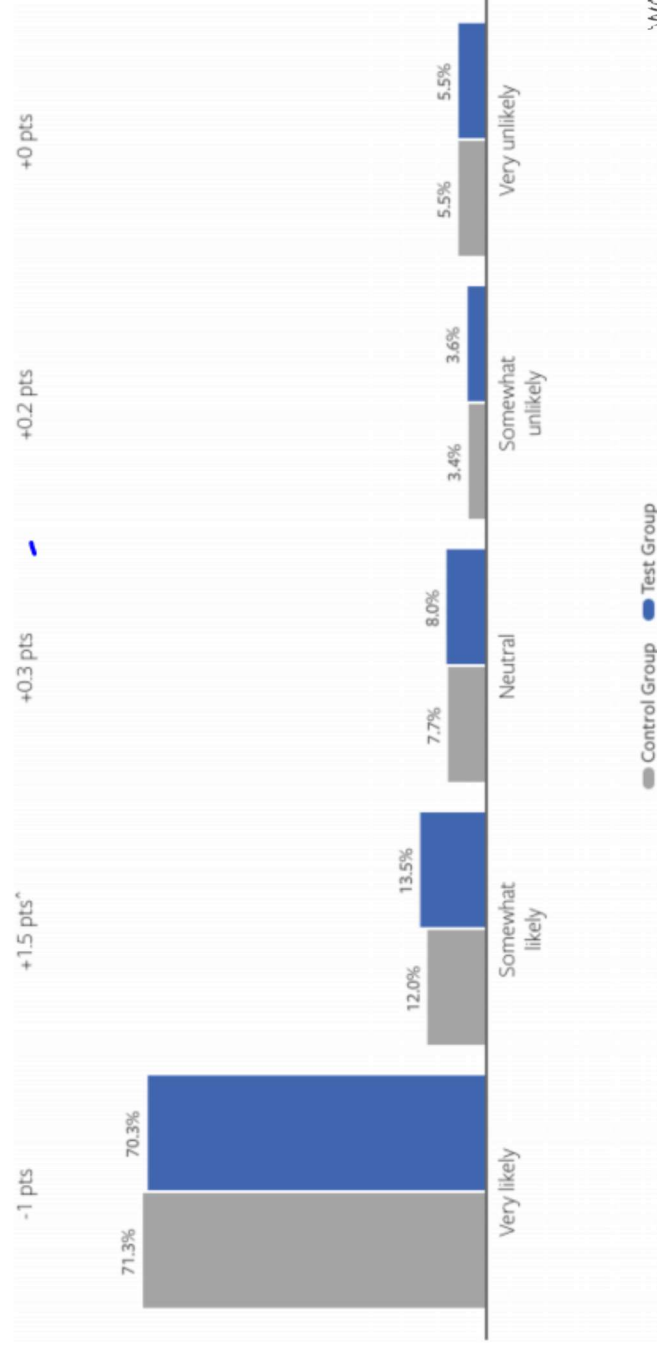
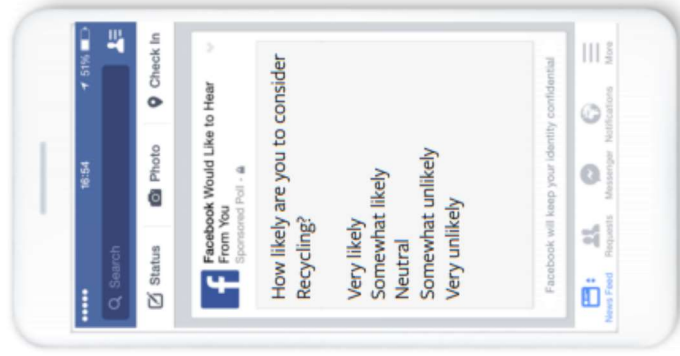
Brand awareness



RESULTS ARE LOW FOR CONSIDERATION DUE TO THE BASE LINE BEING EXTREMELY HIGH

A shift at 80% confidence level was seen among audience who were 'Somewhat likely' to consider Recycling

Action intent



LEARNINGS & RECOMMENDATIONS

Key Learnings

- Historically we have seen stronger view rates on Snapchat vs Facebook but in this case, Facebook was our best performing platform
- Buying across both IG and Facebook platform, enabled us to deliver much stronger results in terms of Views vs our 2018/19 campaign.

Recommendations

- We recommend **running additional formats** in future activity to maximize budget and efficiencies; e.g. FB/IG stories, explore, instant experience and Snapchat commercials.
- **Continue to buy across platform**, allowing the engine to auto-optimize delivery against strongest performing creatives and platform



OOH RESULTS

WE RAN 4 BURSTS BETWEEN OCTOBER 19 AND FEBRUARY THIS YEAR



THANKS TO SECURING ADDITIONAL PANELS WE DELIVERED 3.4% ADDED VALUE

Burst	Format	Booked Quantity	Delivered Quantity	Added Value
October 2019	Bus Supersides	100	100	£0
November 2019	Bus T-Sides	80	81	£400
January 2020	Bus Supersides	115	120	£1,250
February 2020	Bus T-Sides	80	86	£2,400

Additional Panels: 12

Added Value: £4,050 Gross



EDUCATION

DELIVERING COST-EFFECTIVE ENGAGEMENT WILL BE KEY FOR DRIVING SCALE DURING OUR EDUCATION BURST



WHAT

- **Facebook/Instagram:** image assets focusing on materials that can/cannot be recycled with CTA to learn more
- **Snapchat:** video assets focusing on materials that can/cannot be recycled

HOW

- 1x 4 week January burst timed to uplift in interest around recycling
- **Facebook/Instagram targeting:** Re-targeting those that engaged with awareness burst videos
- **Snapchat targeting:** Priority boroughs

WHY

- With a limited budget for education, re-targeting those that engage with our awareness burst will likely drive more relevant impact than broad targeting
- Based on 2018 learnings, Snapchat is a key platform for us when driving video engagement/education messaging

Channel	Facebook/Instagram	Snapchat
Budget	£10k	£18k
Format	FB/IG in-feed & stories	Snap Ads
KPI	Views	Views
Deliverables	7.8k	830k



1. Minimum requirements: 2m reach, 7m impressions, 5-8 weeks R&F buy. Creative must be mobile optimised and reviewed by Facebook's Marketing Science team for study approval

ENSURING WE SELECT OPTIMAL KPIS WILL BE KEY FOR EDUCATION SUCCESS



SELECTING THE RIGHT CHANNEL FOR VIDEO ENGAGEMENT

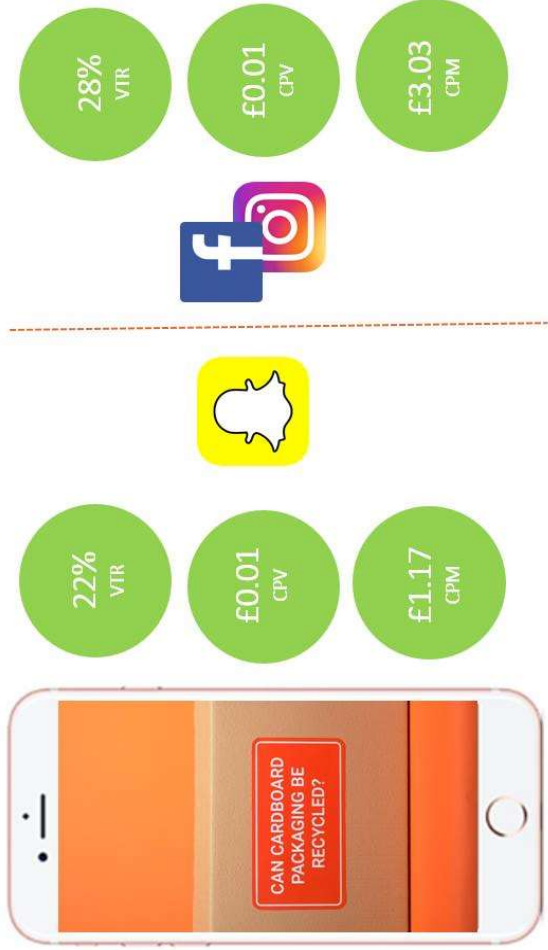
As an agency, we’ve delved deep into the WM Facebook performance over the last 3 years, finding that whilst it remains a **key platform for delivering awareness at scale** and driving consumers to act, it falls short for driving efficient video views

OBJECTIVE	f	i
REACH	X	X
AWARENESS	✓	✓
PERFORMANCE	✓	X
ENGAGEMENTS	✓	✓
VIDEO VIEWS	X	X

Source: Wavemaker FBI Insight 2019

ACTIONING 2018 LEARNINGS TO DRIVE CHANNEL DECISIONS

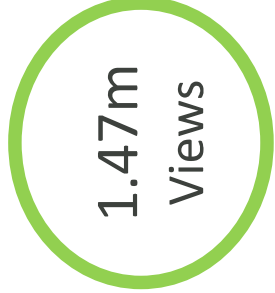
In 2018, whilst we saw comparable view performance for Snapchat vs Facebook and Instagram, **Snapchat delivered a much more cost-effective CPM**. This shows us that Snapchat will continue to be a **key channel for driving video engagement** and **cost-effective scale** for our Education messaging for Recycle for London





EDUCATION DIGITAL RESULTS

EDUCATE TOTAL CAMPAIGN PERFORMANCE



914.8k KPI

9% benchmark

813.1k KPI

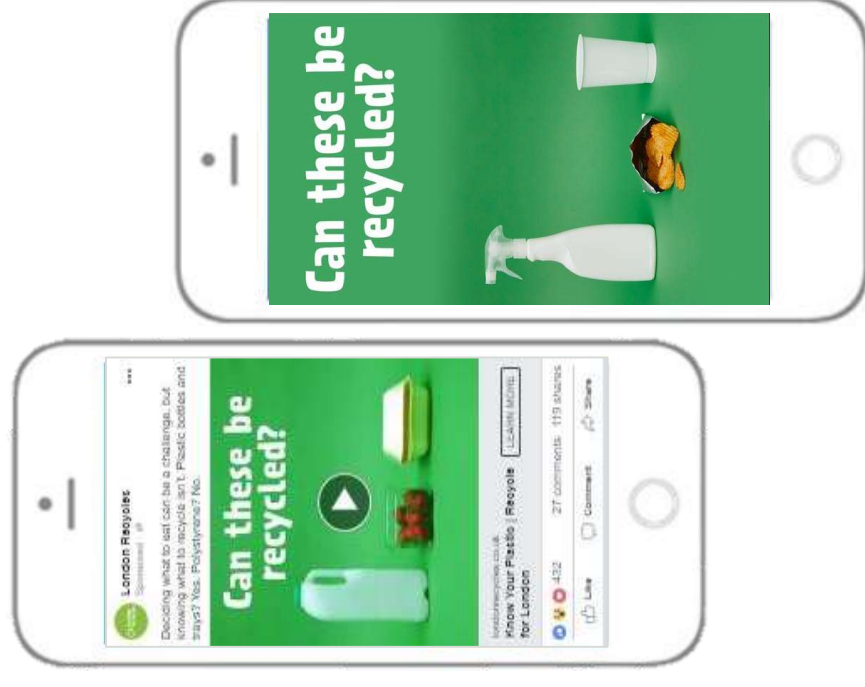
9% benchmark

Channel	Format	Planned CPV	Delivered CPV	Cost Difference	Planned Views	Delivered Views	% Delivered
FB/IG	In-feed video	£0.03	£0.02	-33%	310k	1.03m	+232%
Snapchat	Snap Ads	£0.02	£0.01	-50%	836k	861k	+3%

BOTH PLATFORMS OVERDELIVERED ON PLANNED VIDEO VIEWS

Outcomes:

- The campaign massively overdelivered, achieving 1,890,014 video views, **+335% more than planned**. These extremely strong results were mainly achieved by the FB/IG activity which drive over 1M views at just £0.01.
- Both platforms delivered extremely cost-efficient views, Facebook had £0.01 CPV and Snapchat concluded at <£0.02 CPV.
- Snapchat achieved **+3% more views** than planned and FB/IG had a massive **+232% more views**.
- FB/IG had a stronger completed view rate of 50% vs 35% on Snapchat. This shows that a high percentage users who saw 3" of the content were engaged to the end.
- We have so far delivered a total of **4,014 clicks** on FB/IG at £2.32 CPC, primarily from the Wet Wipes creative.



CREATIVES

FB Ad Breakdown		Instagram				Snapchat			
Creative		Video Views	Completed Views	CPV	VTR	Video Views	Completed Views	CPV	VTR
Cardboard box		71,448	28,700	£0.01	18.46%	53,572	18,158	£0.04	5.17%
Glitter Cards		181,103	73,193	£0.01	20.78%	221,175	52,401	£0.02	10.59%
Wet Wipes		679,650	355,366	£0.01	25.42%	464,307	184,810	£0.01	20.80%
Plastics - HandWash		82,078	46,787	£0.01	21.24%	51,793	23,917	£0.04	8.05%
Plastics - Strawberries		2,737	1,159	£0.01	22.55%	22,746	5,822	£0.05	5.05%
Plastics - Toothpaste		10,752	4,743	£0.01	26.04%	20,521	5,306	£0.05	4.87%
Plastics - Crisp Packets		325	128	£0.01	18.60%	27,807	7,915	£0.05	5.35%
Grand Total		1,028,093	510,076	£0.01	23.51%	808,349	280,171	£0.02	12.72%

- **Wet Wipes Ad was the strongest performing** creative on both platforms. It had the most efficient CPM, clicks, and strongest View Through Rate (21% on FB and 26% Snapchat).
- Glitter Card also delivered strong results, achieving a £0.01 CPV on FB and £0.02 CPV on Snapchat.
- **All creatives had a £0.01 CPV on FB/IG** however Plastics ads delivered a much weaker CPV on Snapchat compared to the other creatives. The Snapchat audience engaged more with creatives that had real hands and movement



LEARNINGS & RECOMMENDATIONS

Key Learnings

- Historically we have seen stronger view rates on Snapchat vs Facebook but in this case, Facebook was our best performing platform
- Buying across both IG and Facebook platform, enabled us to deliver much stronger results in terms of Views vs our 2018/19 campaign.

Recommendations

- We recommend **running additional formats** in future activity to maximize budget and efficiencies; e.g. FB/IG stories, explore, instant experience and Snapchat commercials.
- **Create content that looks native in the platform:** The educate ads featured human hands vs Plastics with no human presence. We would recommend content that includes real people, 'selfie style' or uses native platform features such as polls/stickers.
- Glitter cards, drove the majority of post engagement. We recommend creatives are more contextual in terms of time and audience trends.



THANK YOU

Appendix B2

LWARB Campaign Research, Spring 2020

April 2020

Phil Downing

Background & Methodology



This slide deck details the results of research undertaken on behalf of LWARB. It looks at a range of behaviours and attitudes following Recycle for London’s “One Bin is Rubbish” (OBIR) campaign.

- Sample: 609 adults 18-44 with responsibility for rubbish and recycling in the home, and resident in 16 London boroughs. Students in university halls were excluded.
- Quotas: age interlocked with gender, and across the 16 boroughs.
- Fieldwork: 16-26 March 2020.
- Base sizes vary by question and are always stated. NB. some questions are based on “respondents” and some are based on “bins”.

Statistical significance



- Sample of consumers, not a census.
- 95% confidence level (i.e. 95/100 the difference will be real).
- Statistically significant findings are flagged using colour – **purple** = a significant decrease; **orange** = a significant increase.
- ‘Significant’ is used in the statistical sense – not a commentary on whether it is of any policy interest.

Executive summary

Key findings 1 – the past year



- Over half (57%) of the target audience say they have seen one or more of the OBIR communications, up from 2018 (32%) and in line with 2019 (55%). Bus side posters alone have reached over one in three (36%) of the target audience (up from 14% in 2018 and 28% in 2019).
- The OBIR campaign has directly led, in the past year, to 8.2% of the target audience acquiring a new recycling bin/alternative and recycling more as a result. This is significantly more than in 2018 (2.5%) and in line with 2019 (7.8%).
- It has proportionately had more impact on the following groups: recycling segment 1 (15.3% have acquired a recycling bin/alternative in the past year and are recycling more as a result of OBIR); 18-24s (13.5%), those with lower recycling motivation (12.1%) and men (10.5%).
- There is also a potentially attributable overspill impact: an additional 22.5% of the target audience say they have increased the amount they are recycling as well as having seen OBIR materials in the past year (but they have not acquired a recycling bin/alternative in the past year).

Key findings 2 – cumulative impact since 2017

- 27% of all the bins/alternatives among the target audience are specifically for recycling (an increase from 21% in 2017 and 24% in 2019).
- The average number of recycling bins/alternatives per home now stands at 2.1, up from 1.1 in 2017 and 1.6 in 2019. In particular, there has been a significant increase in *informal* recycling bins and recycling ‘spots’ in the home among those who have seen OBIR.
- There has been no change in how motivated the target audience are or how confident they are about what can/can’t be recycled. There has, however, been an increase in the proportion who opt to recycle items when they are uncertain if it can be recycled (something that is associated with seeing OBIR materials).
- There has been an increase in the perceived norms of (a) having a dedicated bin/alternative for recycling in the home; and (b) having recycling bins/alternatives in rooms around the home (other than the kitchen). In both cases there is a clear association with seeing OBIR materials. There has also been an increase in the perceived norm of ‘everyone recycles where I live’ (although this does not appear to be directly associated with OBIR).
- There has been a decrease in the proportion of the target audience who dispose of plastic items in the general rubbish – including toiletries/shampoo bottles, detergent/cleaning bottles, and plastic pots/tubs/trays. There has also been a decrease in the proportion who put several ‘contaminant’ items in the recycling – including plastic carriers bags, bubble wrap, tissues/wet wipes, pizza boxes or foil with food/oil residue and black plastic bags containing recycling.
- Recognition of London recycling brands has increased – to 73% for either *London Recycles* or *Recycle for London* (up from 66% in 2017).
- There has been no overall change in the proportion who agree that “*I could do better with the amount I recycle*” – although agreement is higher among those who have seen OBIR materials (suggesting the campaign could help to expand their knowledge/aspirations about what can be recycled).

1. Campaign attribution

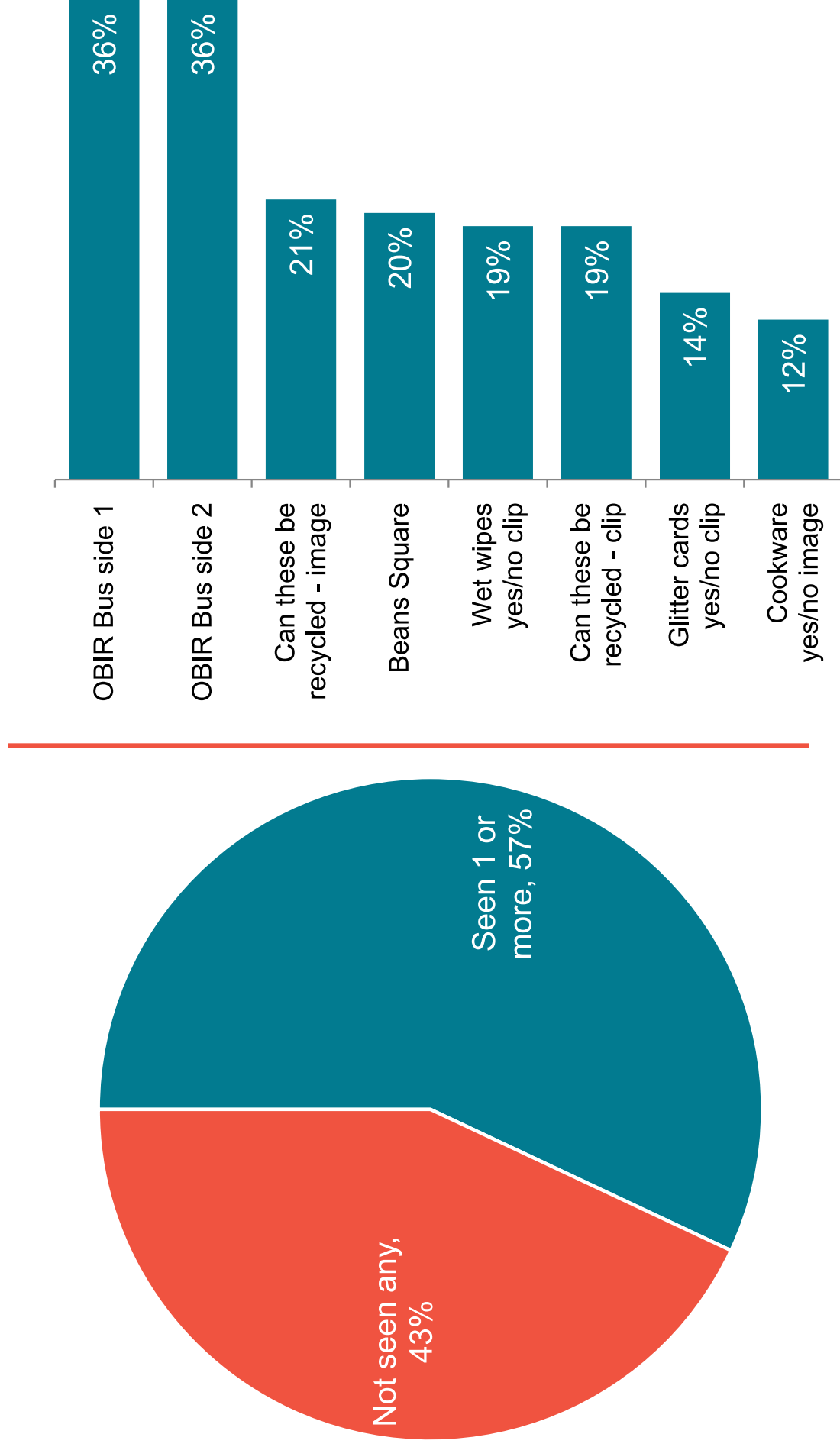
Elements of the evaluation

1. Campaign recall, i.e. seen OBIR assets
2. Target behaviour 1: acquired one or more bins (or alternatives) dedicated to recycling
3. Target behaviour 2: recycling more as a result of acquiring one or more bins (or alternatives) dedicated to recycling
4. Cite a OBIR communications channel as a reason for acquiring one or more bins (or alternatives) dedicated to recycling.
5. The overall proportion of bins (or alternatives) that are for recycling; and the overall proportion of the target market who have a bin (or alternative) specifically for recycling.

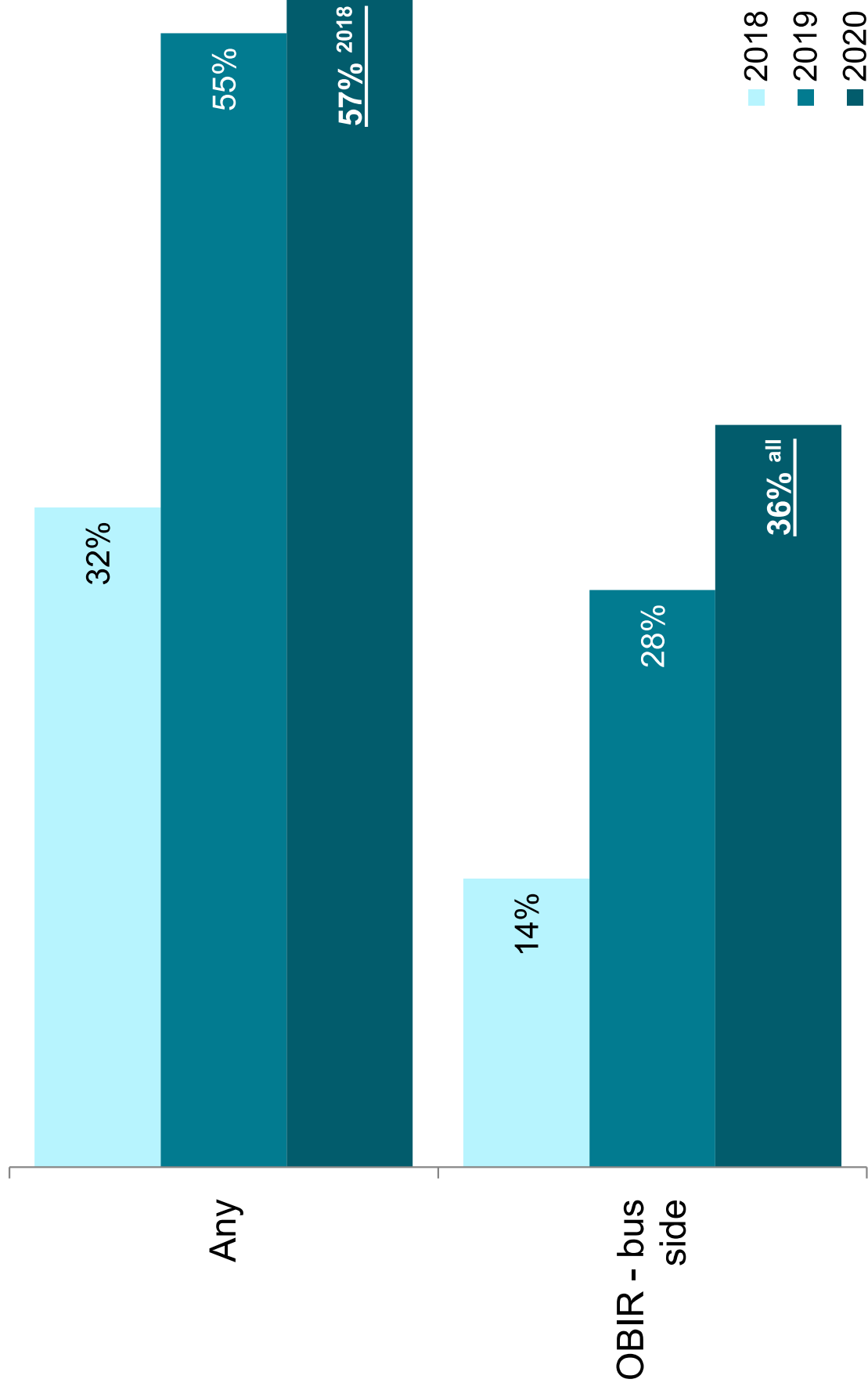
1. Campaign recognition



Q17a. In the past year do you recall seeing the following anywhere (e.g. on bus-sides, print adverts, online adverts etc.)?



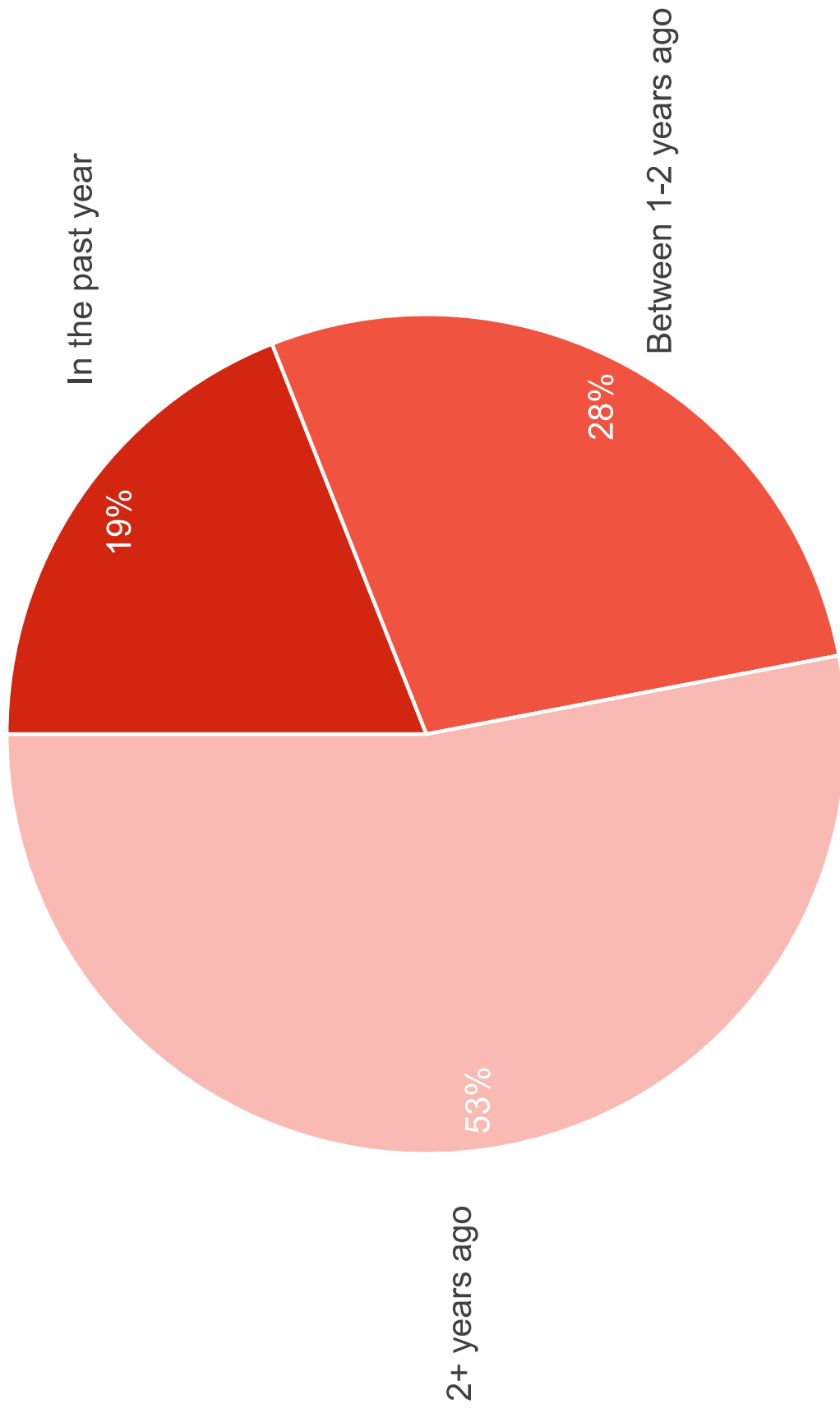
1. Campaign recognition – over time



2. Acquiring a dedicated recycling bin (or alternative)



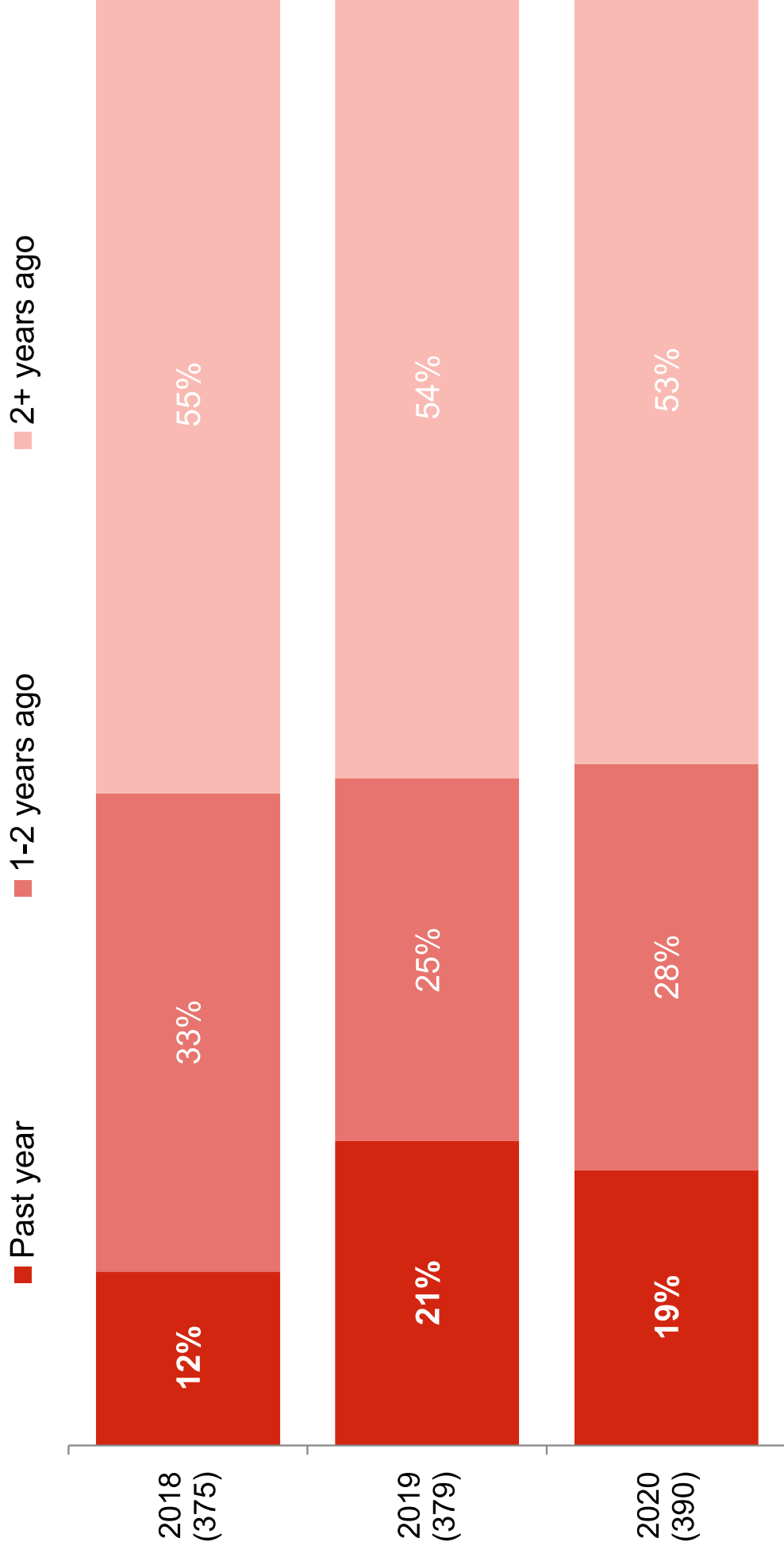
Q22. You said that you have bins (or alternatives) at home specifically for recycling. When was the last time you added/started using a separate bin (or alternative) inside your home that is specifically for recycling?



2. Acquiring a dedicated recycling bin (or alternative) – over time



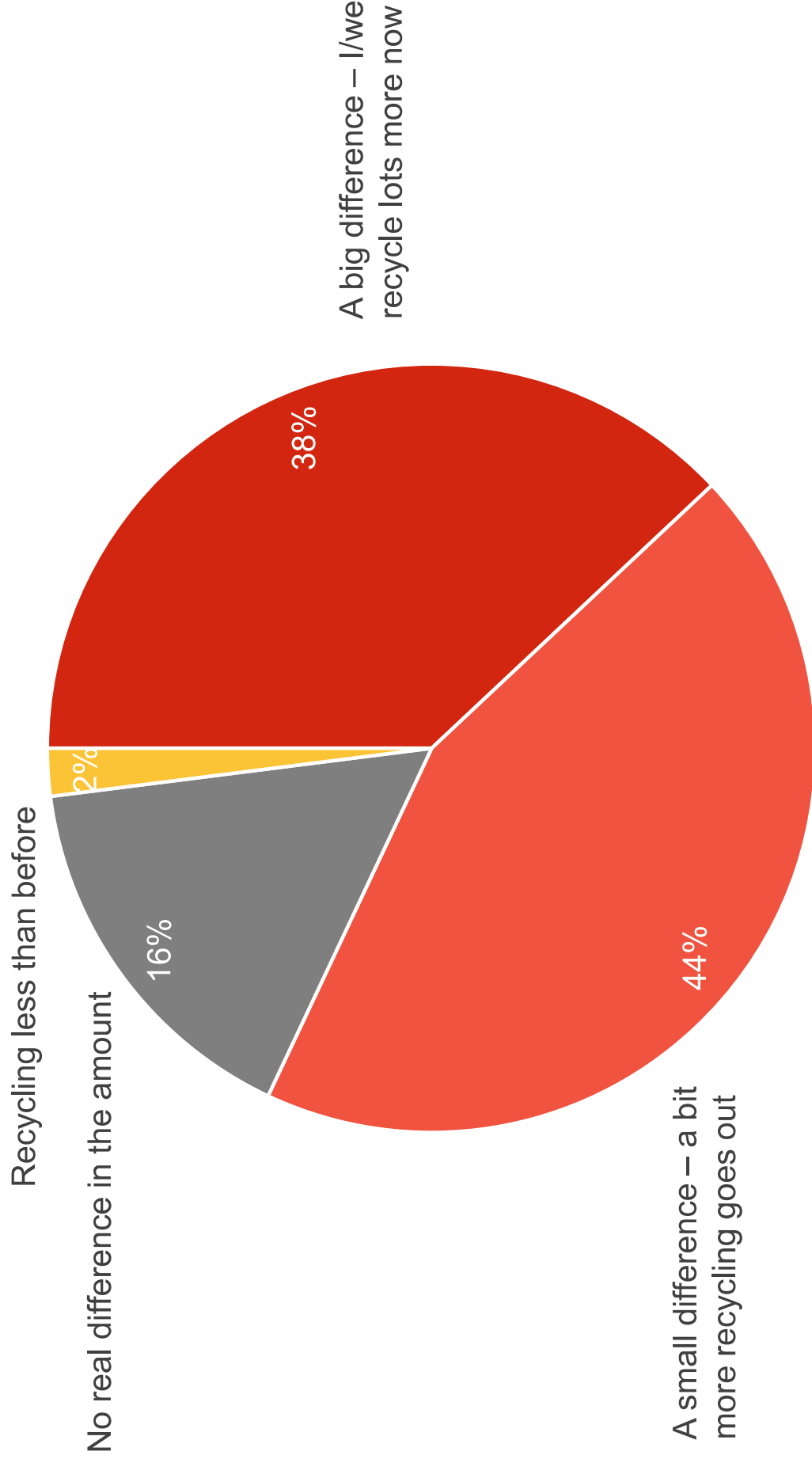
Q22. You said that you have bins (or alternatives) at home specifically for recycling. When was the last time you added/started using a separate bin (or alternative) inside your home that is specifically for recycling?



3. Impact of acquiring a dedicated recycling bin (or alternative)



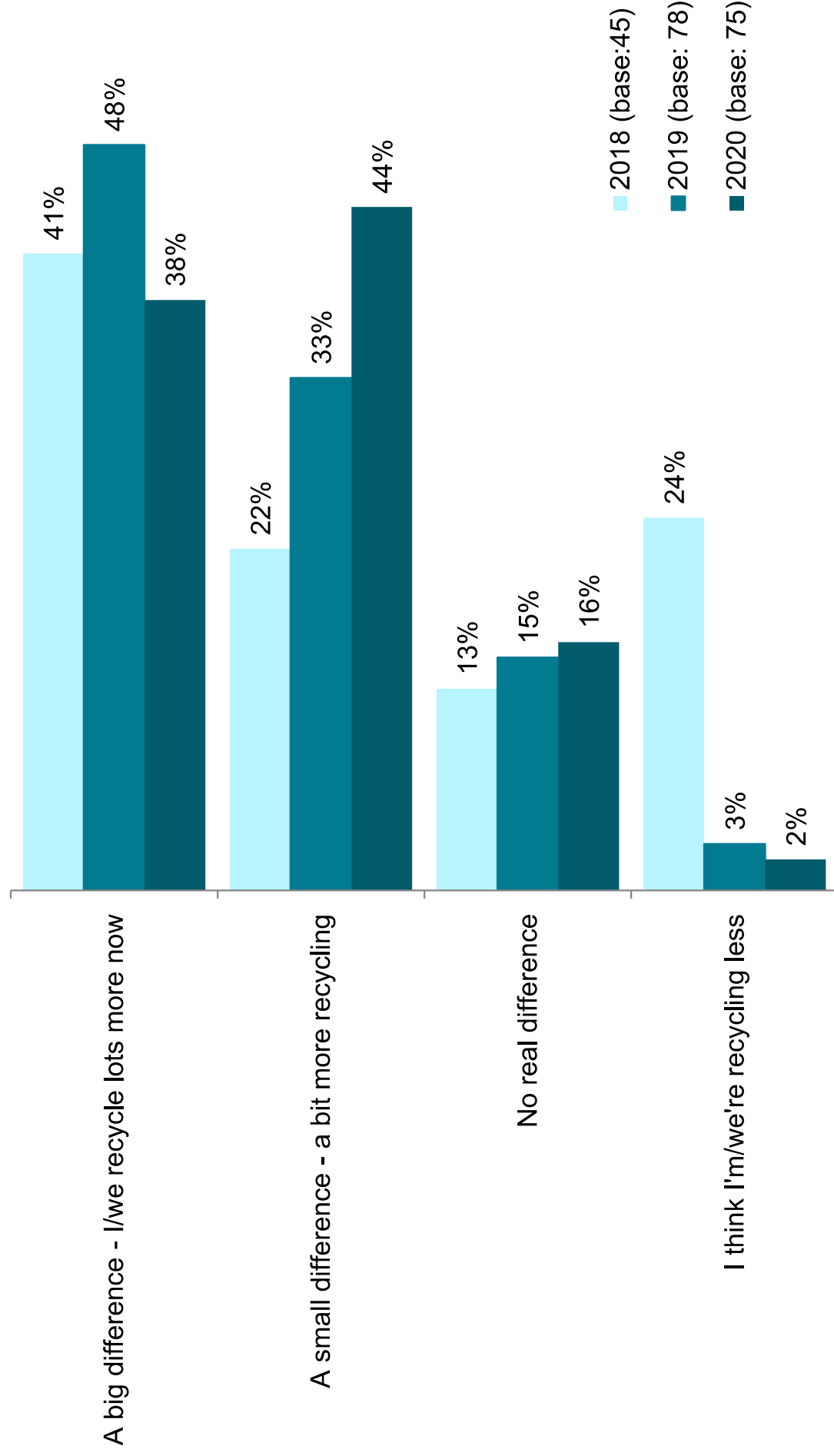
Q25a. What difference, if any, has having a separate place for the recycling made to how much of it you are able to put out for collection?



3. Impact of acquiring a dedicated recycling bin (or alternative) – over time



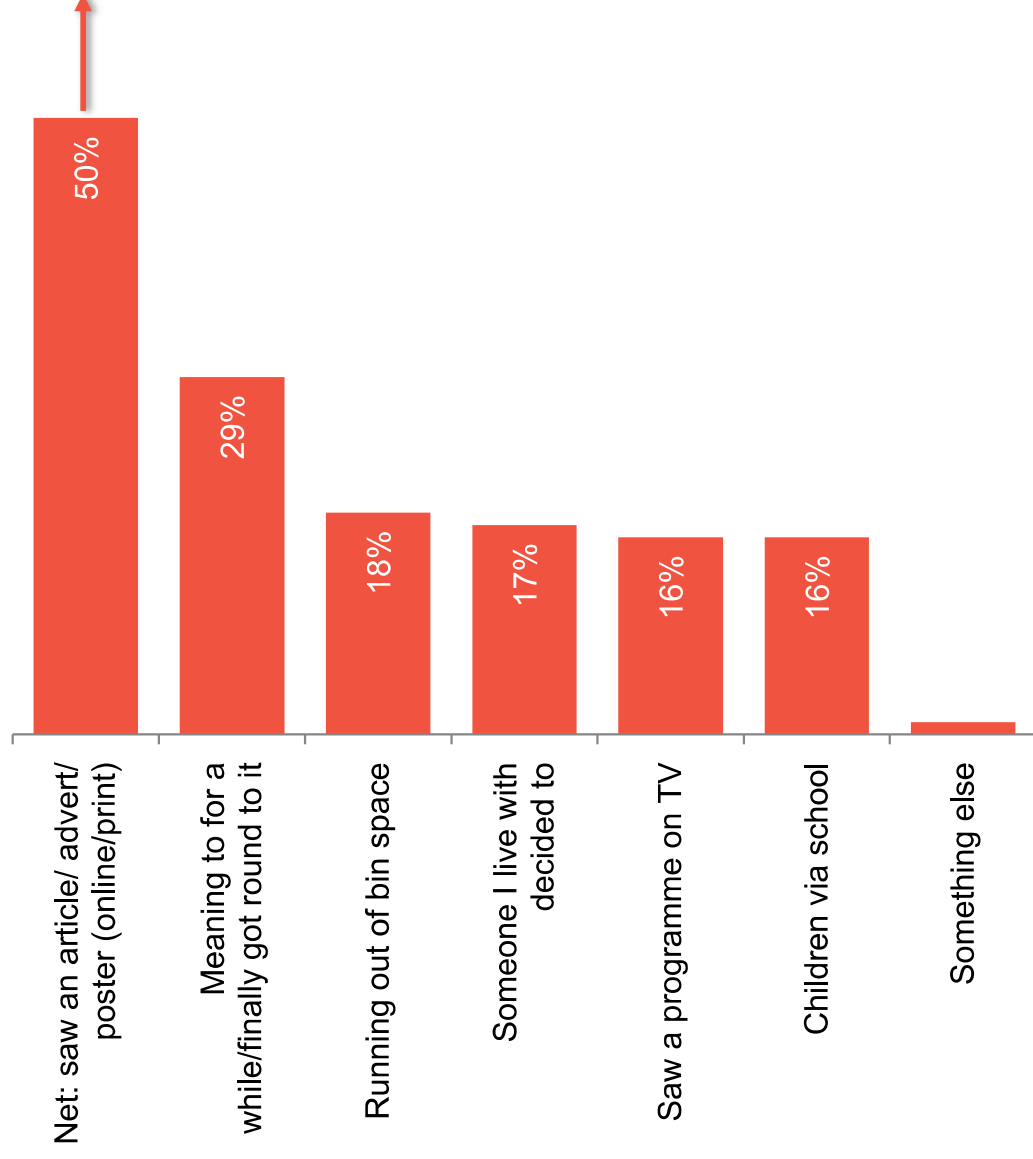
Q25a. What difference, if any, has having a separate place for the recycling made to how much of it you are able to put out for collection?



4. Citing OBIR as a reason for the newly acquired recycling bin (or alternative)



Q23 then asked those who had acquired it in the past year the reasons why



Direct attribution is stronger in 2020 than either 2018 (44%) or 2018 (28%).

Of the 36 who cited having seen an ad/poster/article as the reason for getting a dedicated recycling bin, the following sources were cited:

1. Side of a bus – 12
2. An advert while browsing online – 20
3. Social media – 14
4. An article in the Evening Standard, Metro or magazine (e.g. Time Out) – 4
5. An advert on phone – 9

N.B. Of the 36 – 27 were segment 1 or 6.

Calculating attribution



Lower

% of 18-44s in the 16 boroughs who...

- Have got a new recycling bin (or alternative) in the past year AND
- Say this is because of an ad/article/poster (in print or online/social media) AND
- Recall 1+ of the OBIR assets AND
- Are recycling more as a result

= 4.9%

Upper

% of 18-44s in the 16 boroughs who...

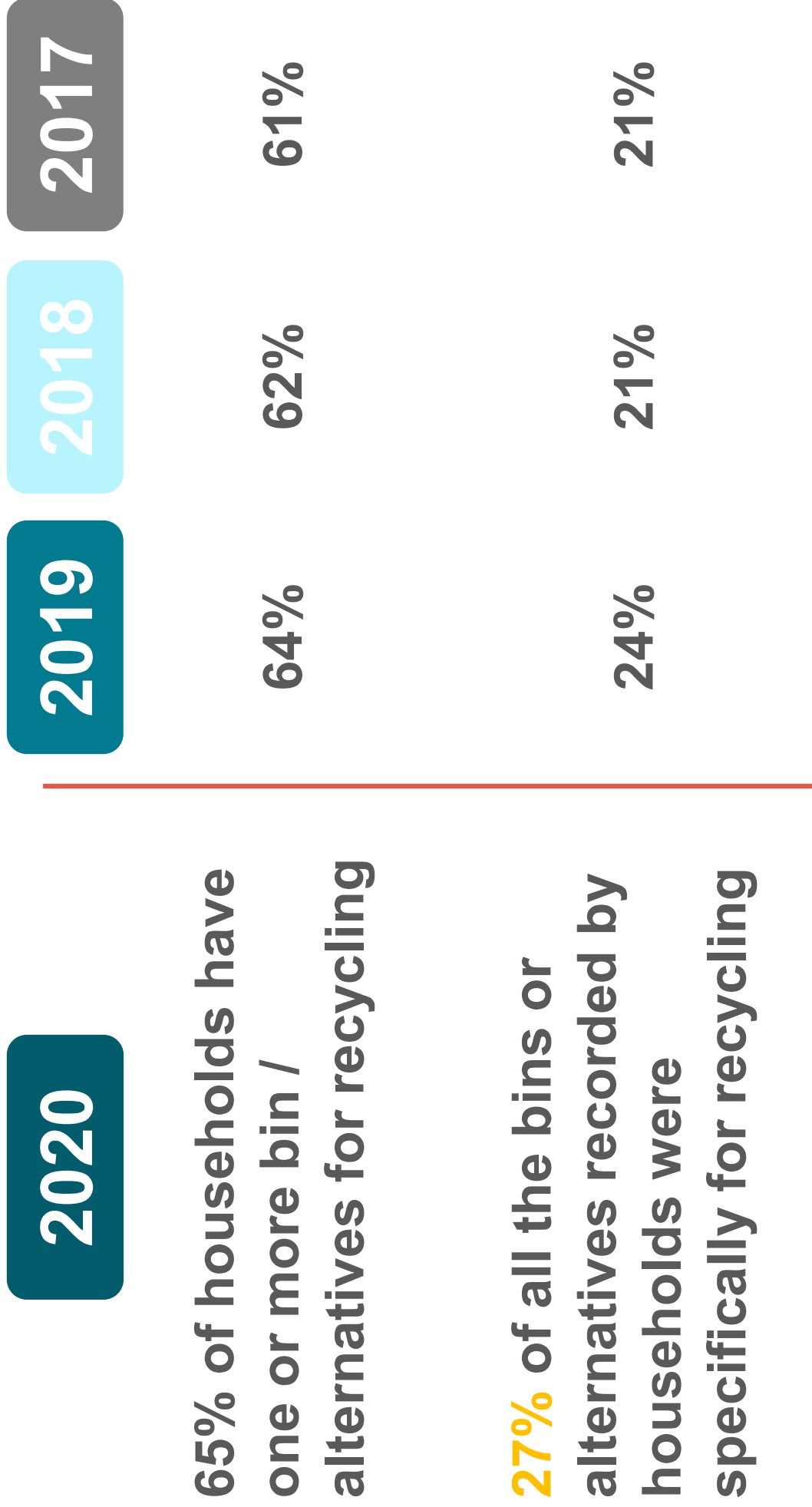
- Have got a new recycling bin (or alternative) in the past year AND
- Recall 1+ of the OBIR assets AND
- Are recycling more as a result

= 8.2%

[2018 = 2.5%; 2019 = 7.8%]

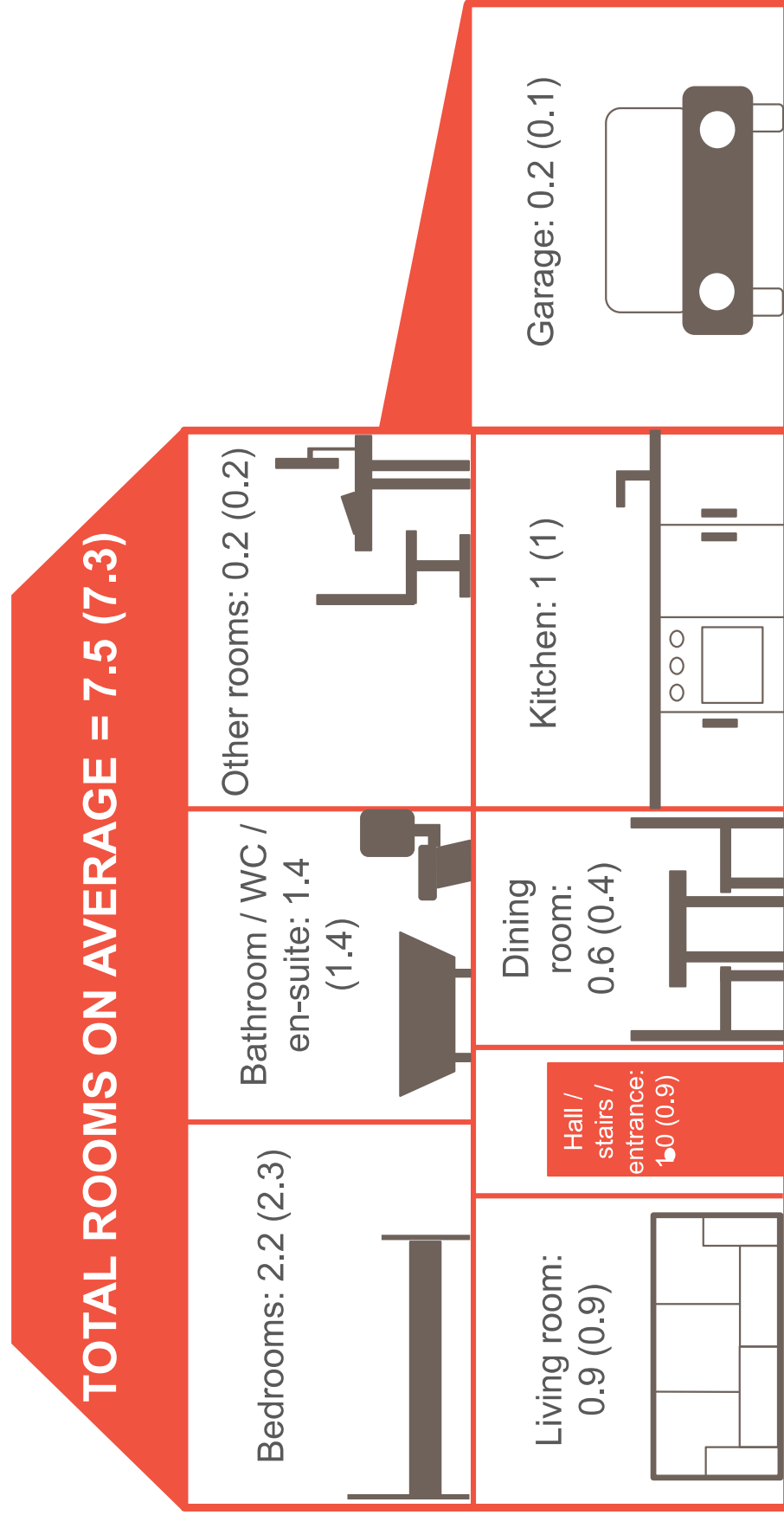
Positive overspill* = 22.5% of 18-44s in the 16 boroughs

5. The proportion of recycling bins (or alternatives)



2. Bins at home

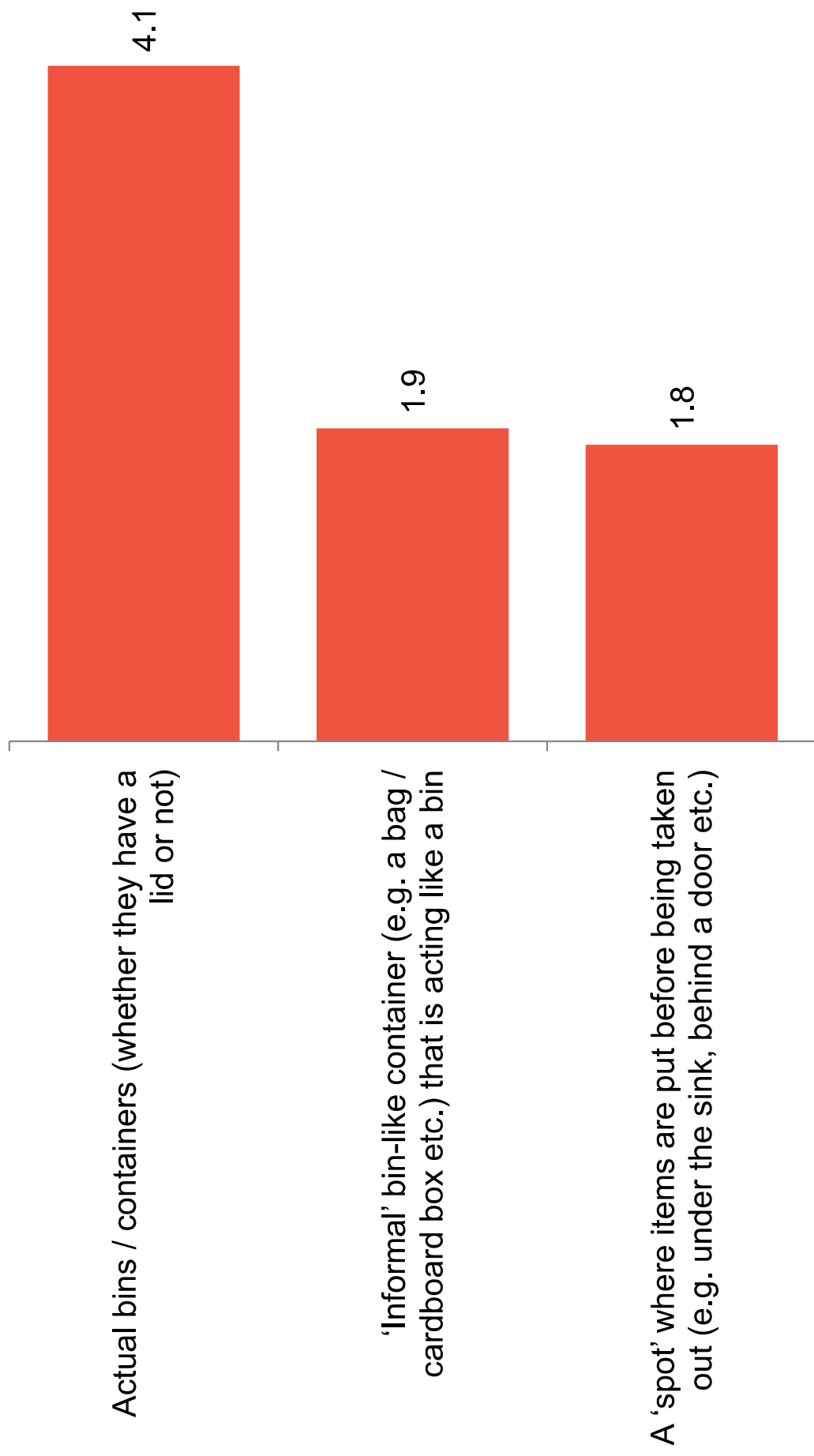
The average home



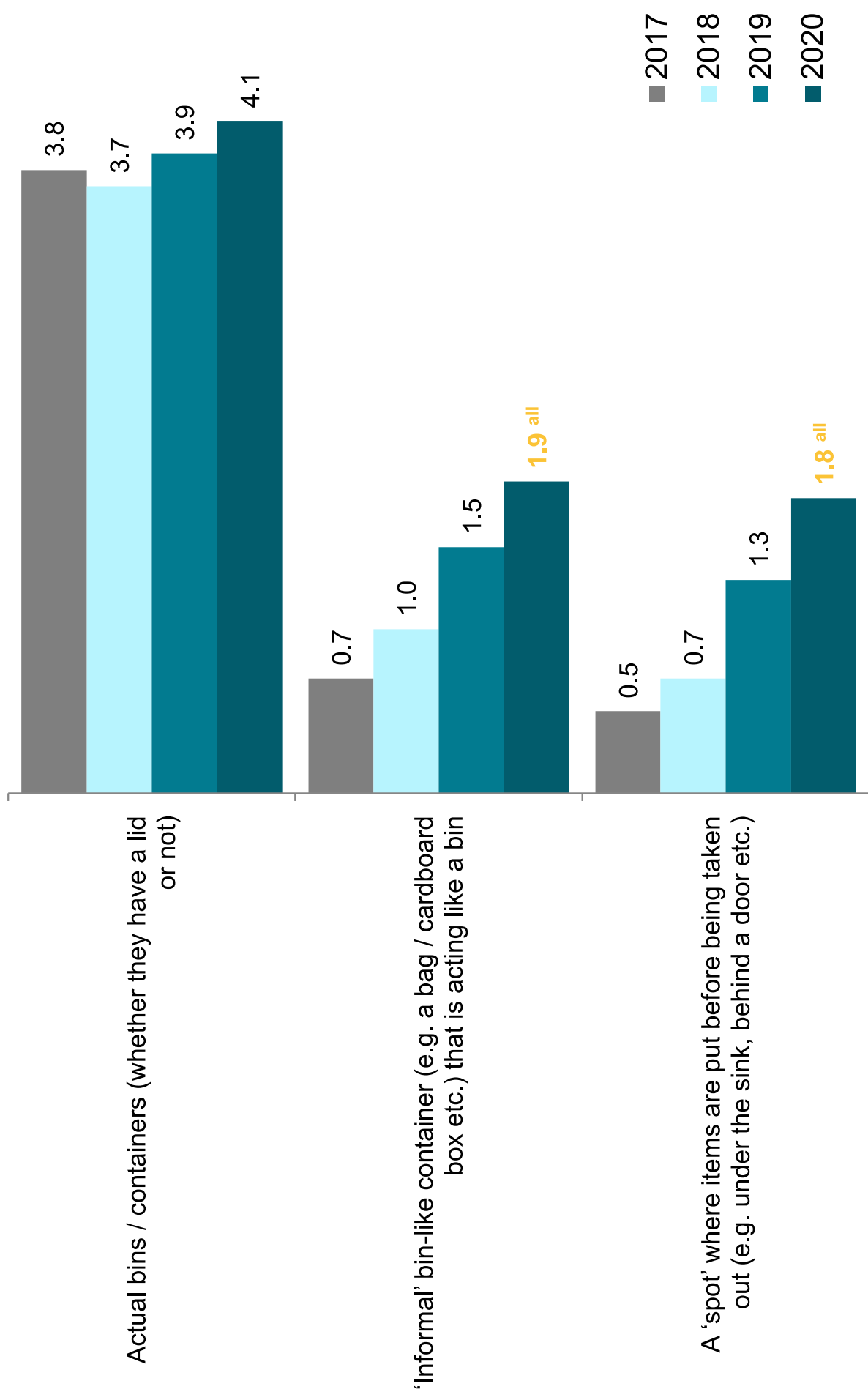
Average number of bins (or alternatives) per home



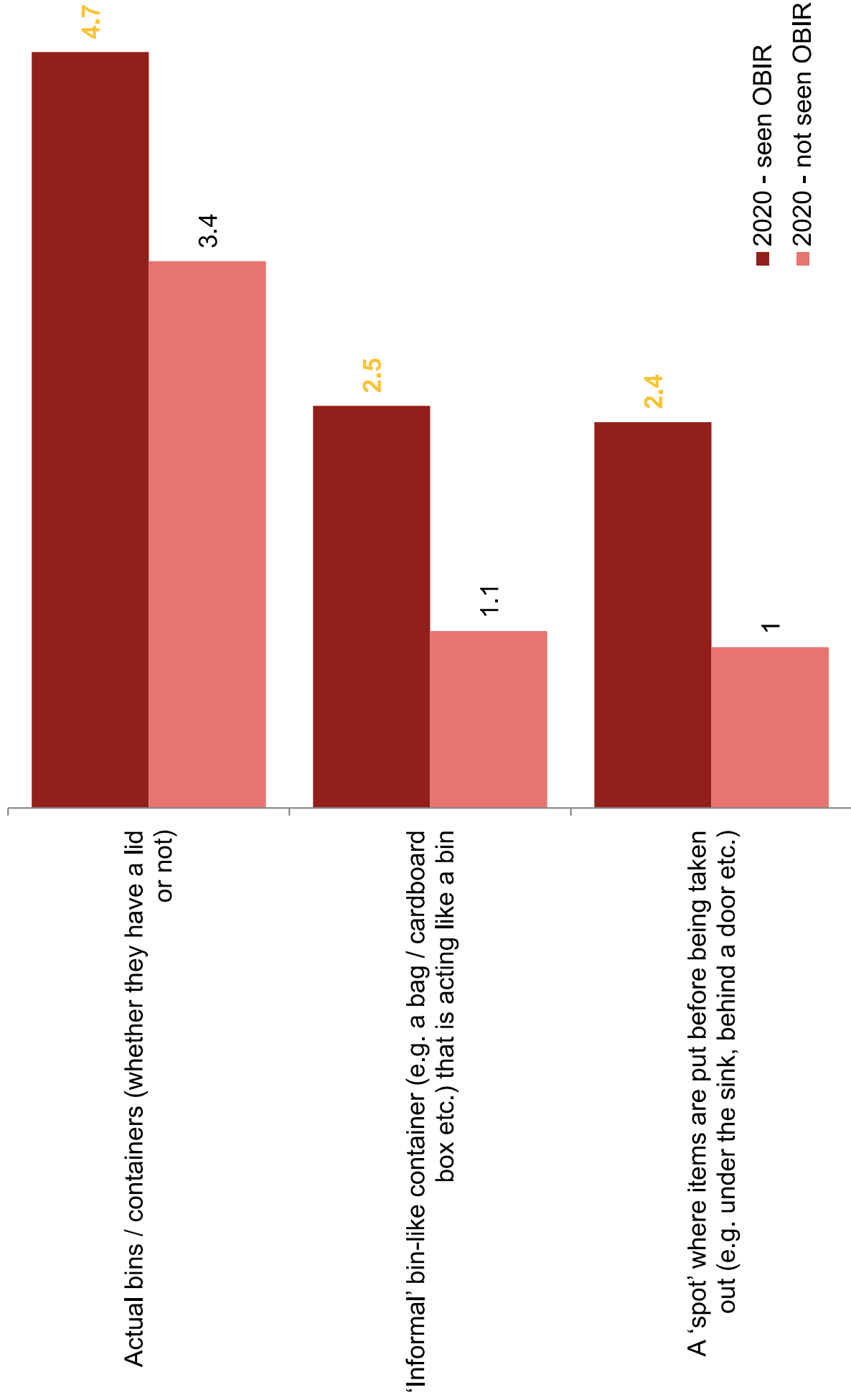
Households were asked to specify how many bins they have inside their home (differentiating between actual bins and informal containers acting like bins or ‘spots’ where items are put before being taken out). NB. Bins with multiple sections were counted as per the number of sections they have, rather than a single bin.



Average number of bins (or alternatives) per home – over time

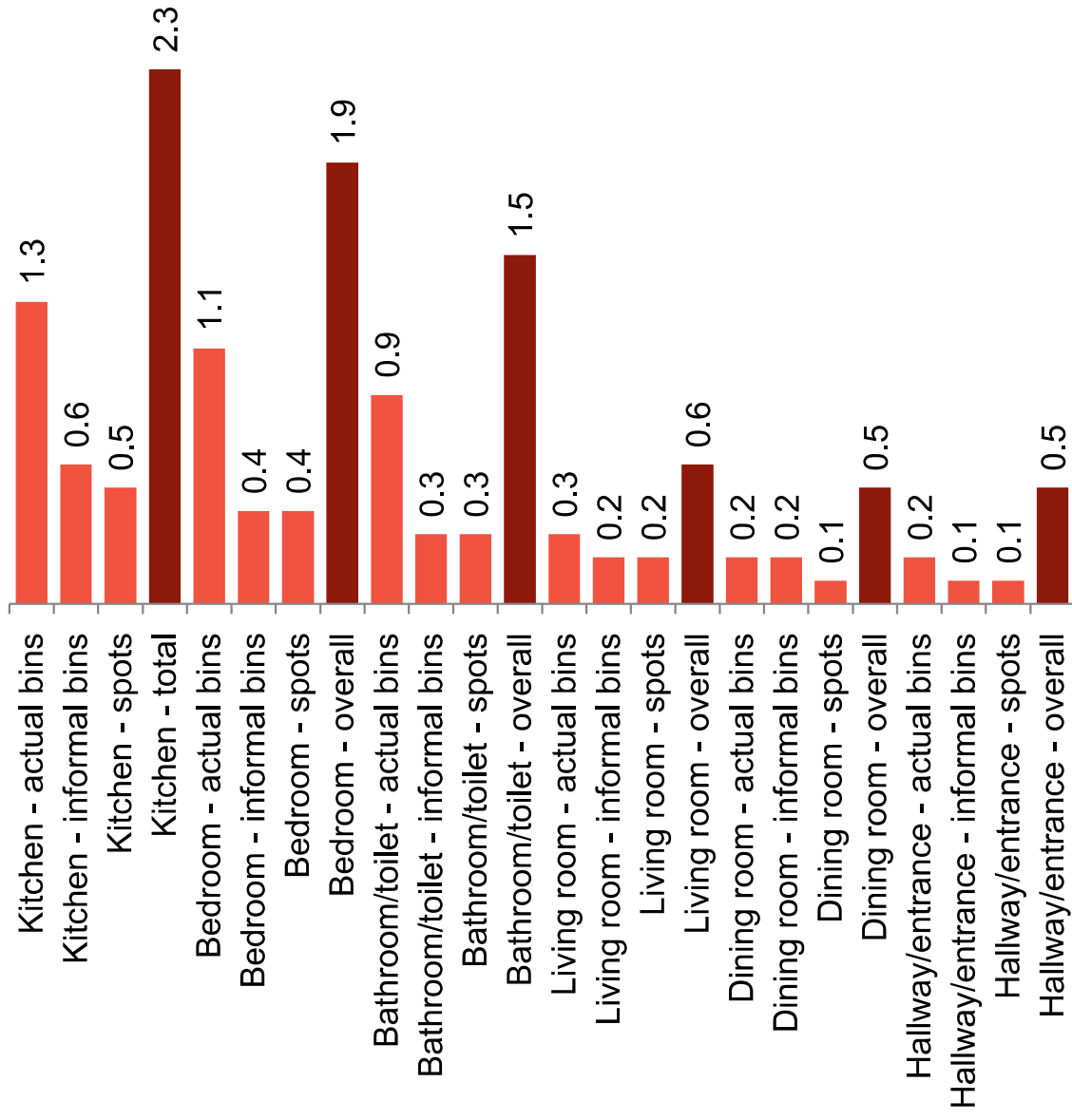


Average number of bins (or alternatives) per home – seen vs. not seen OBIR



Location of bins (or alternatives) in the home

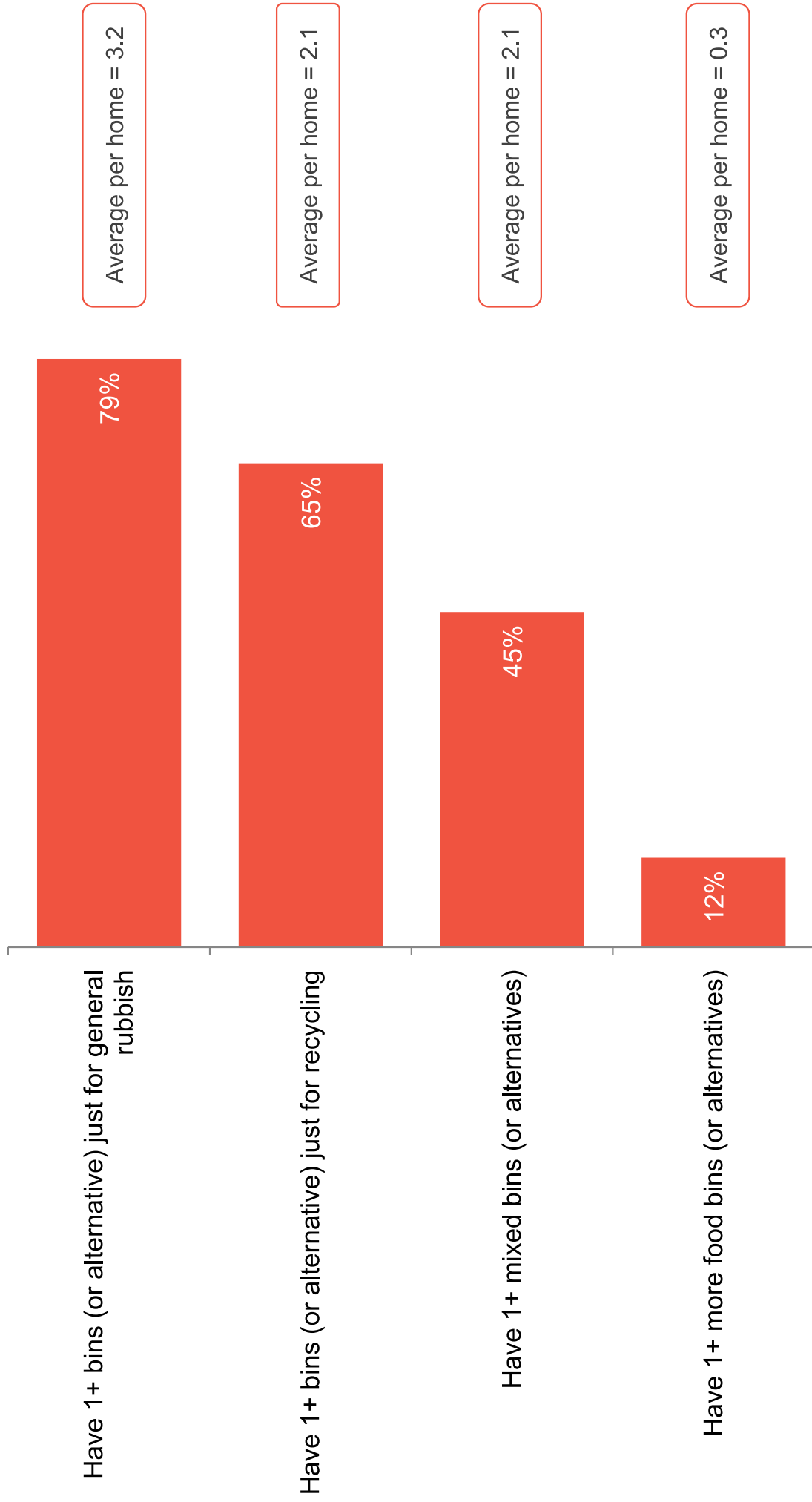
This graph shows where bins are located in the home – with an average of 2.3 bins (or alternatives) in the kitchen, 1.9 in the bedroom(s), and 1.5 in the bathroom(s)/toilet(s).



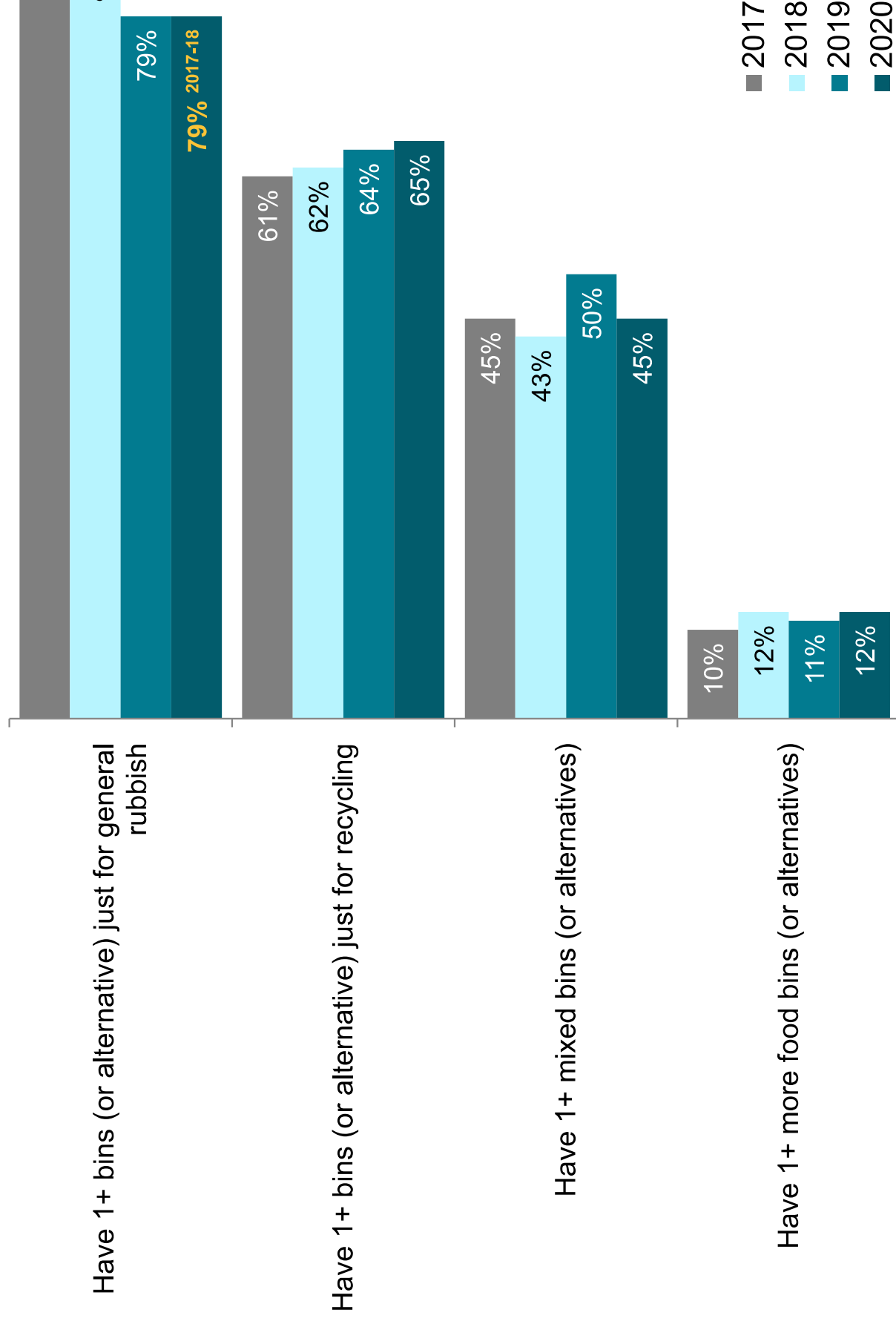
Types of bin (or alternative) per home



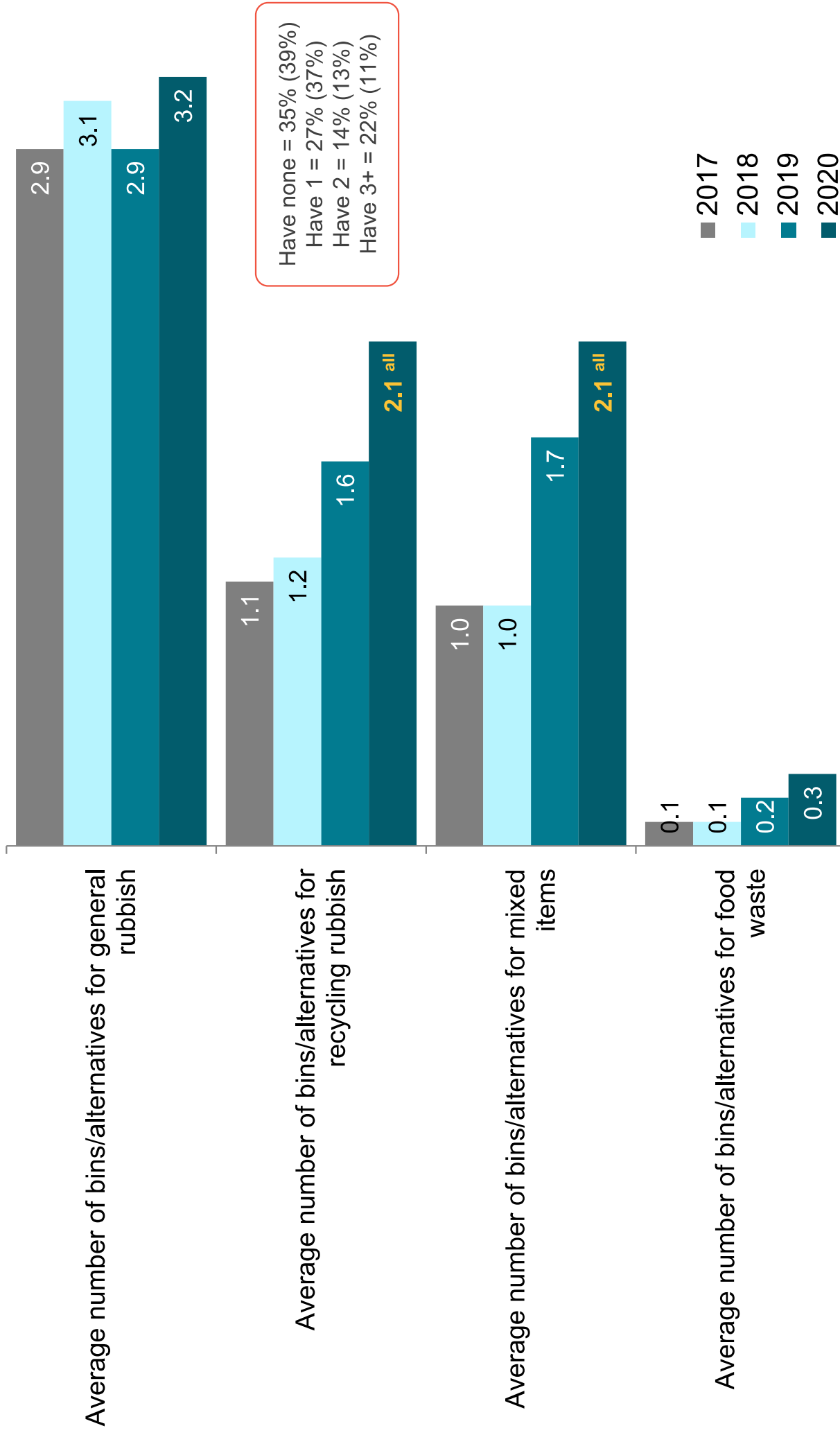
The data here is now shown on a per household (i.e. respondent) basis. Almost two in three homes (65%) have one or more bins (or alternatives) that are just for recycling – meaning that 35% do not.



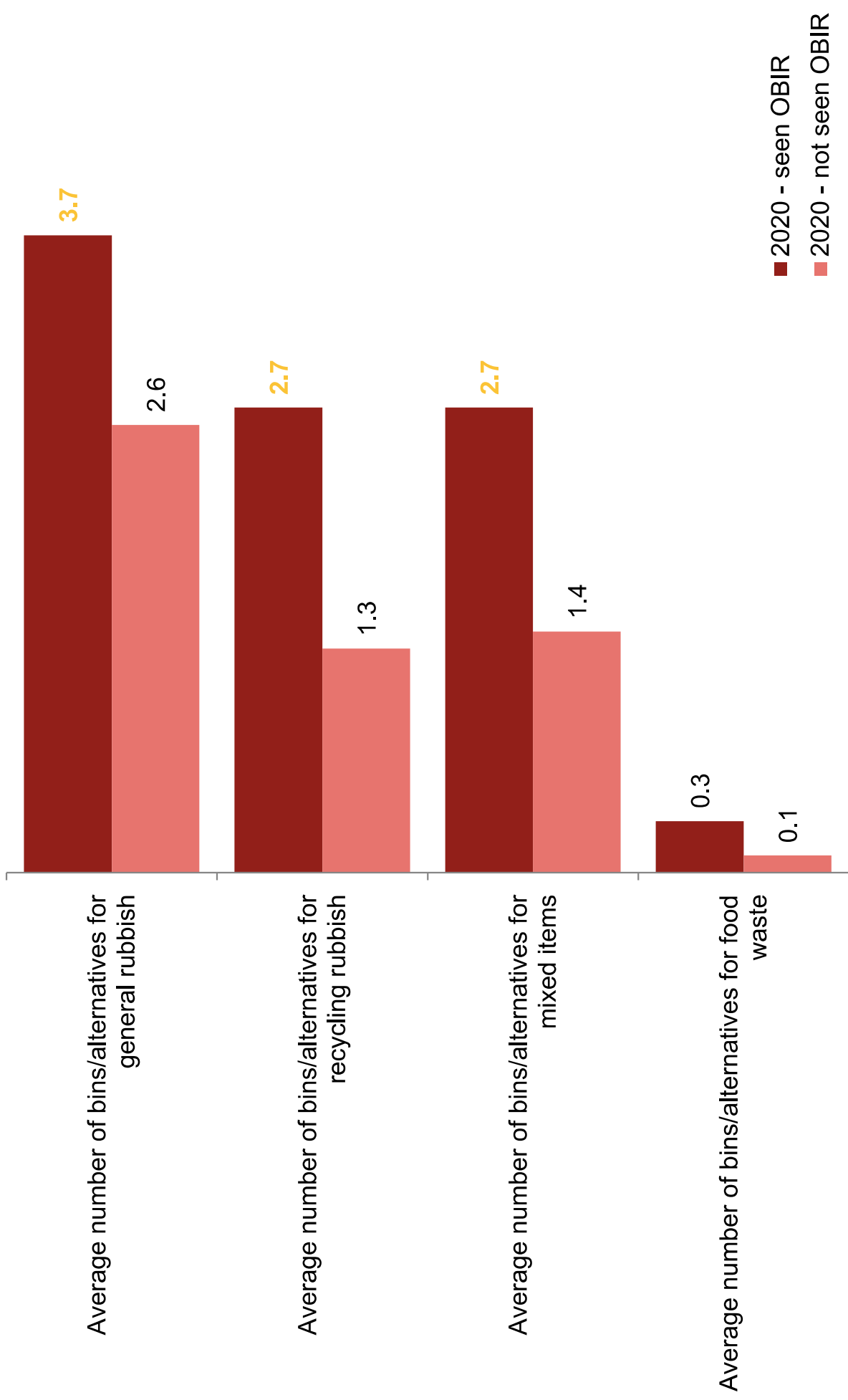
Types of bin (or alternative) per home - over time



Average number of each bin type (or alternative) – over time



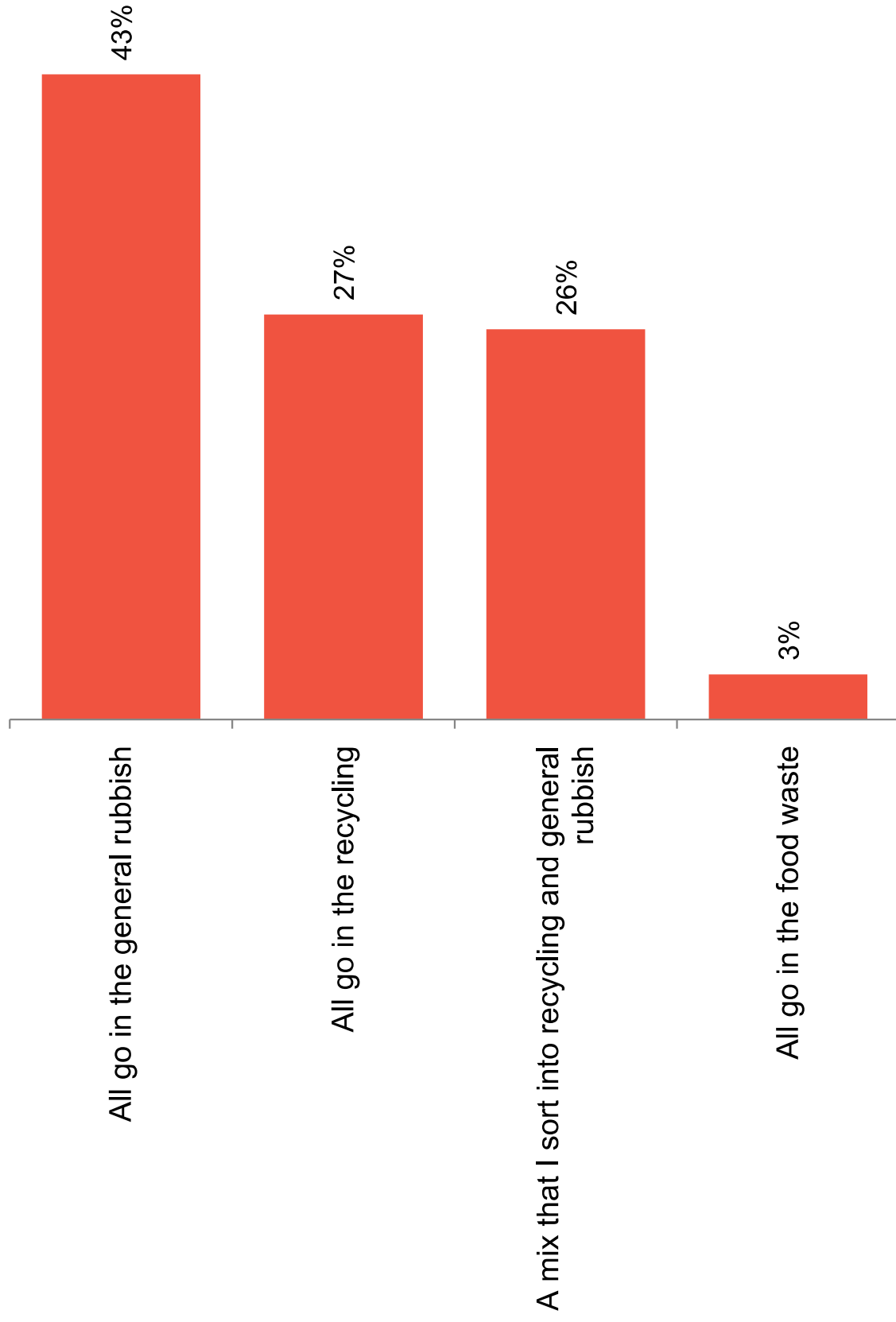
Average number of each bin type (or alternative) – seen vs. not seen OBIR



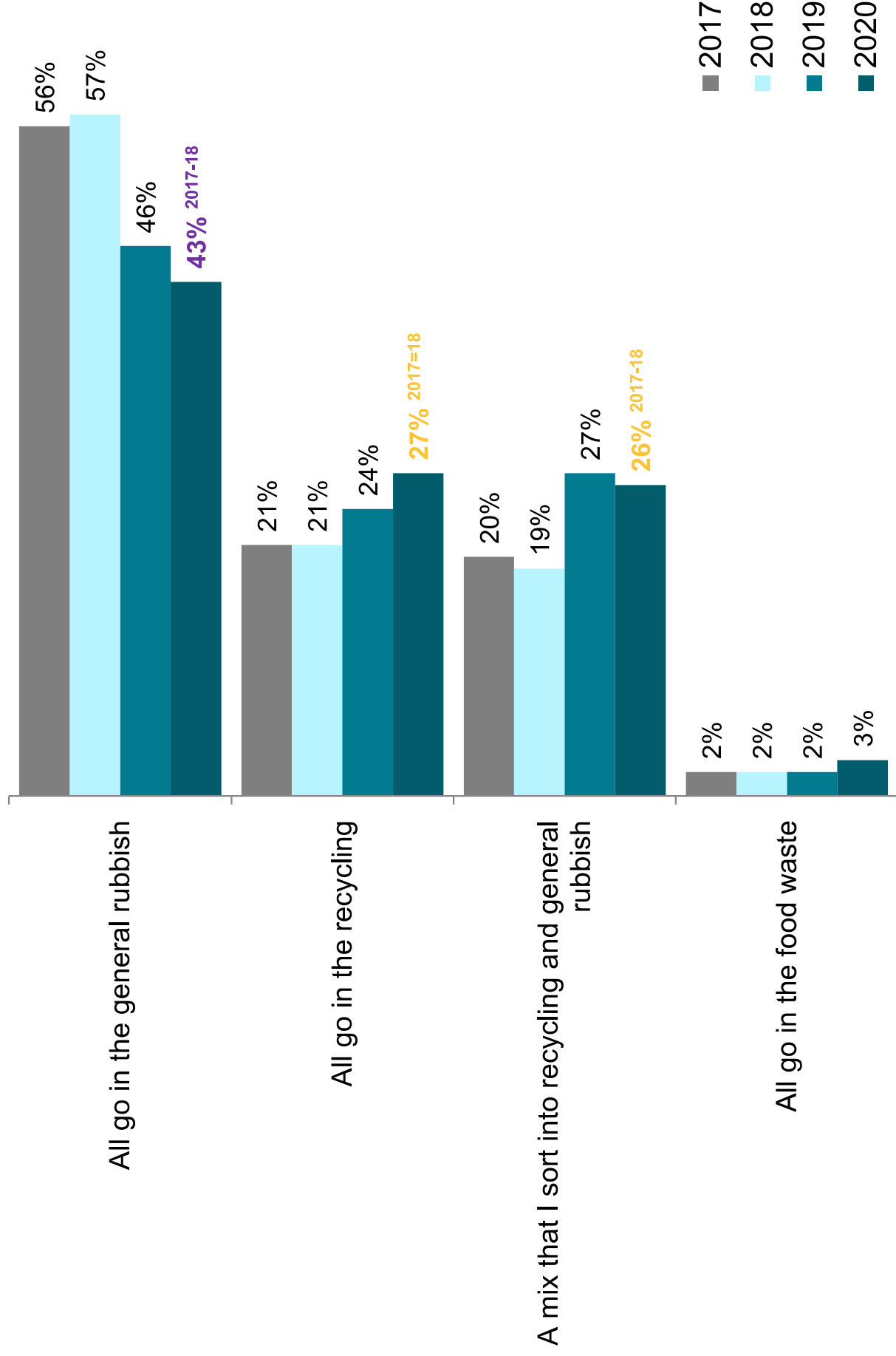
Outcomes per bin



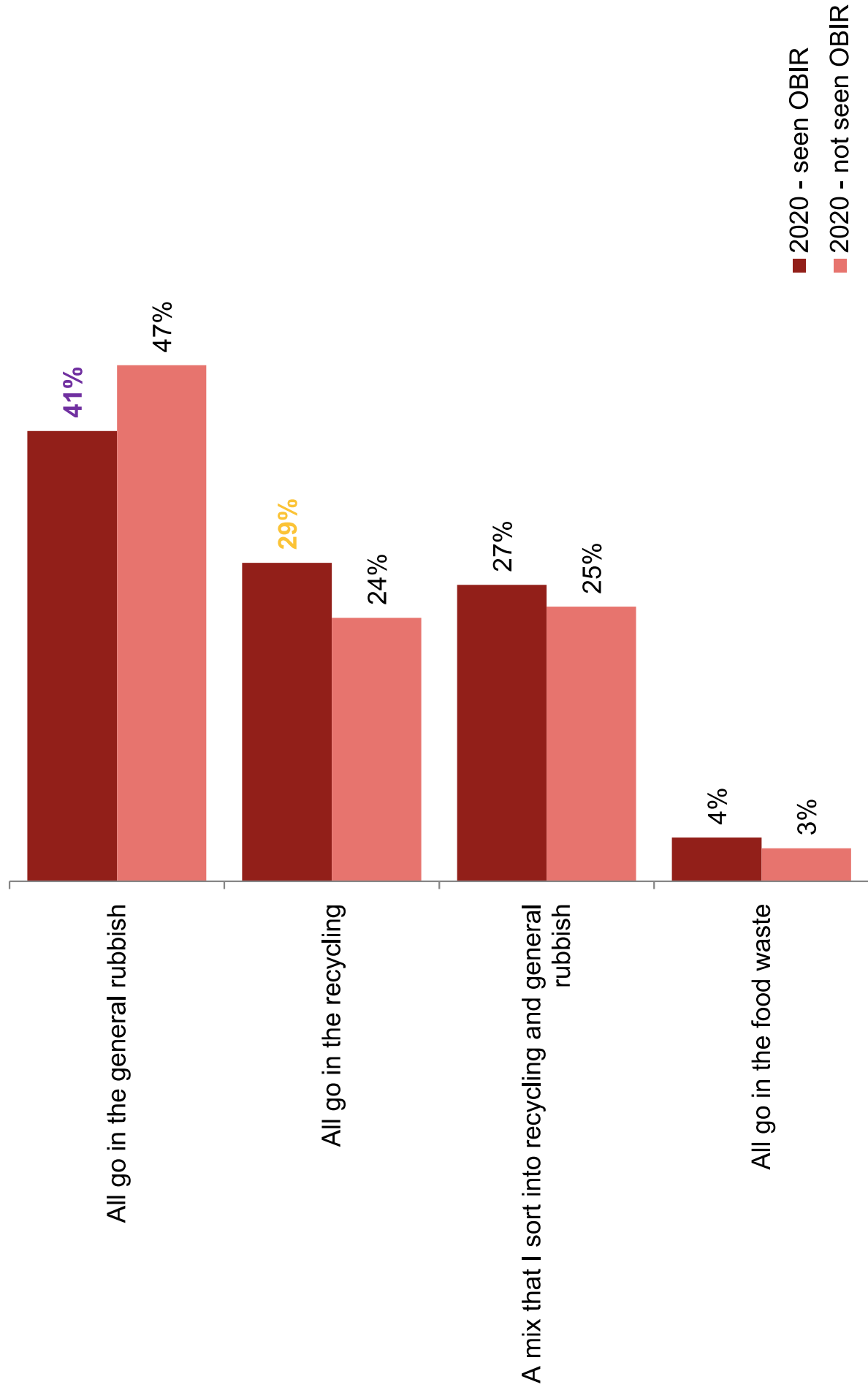
The data here is now shown on a per bin basis. Overall, the 609 households had 4,389 bins (or alternatives) with the outcome as follows:



Outcomes per bin – over time



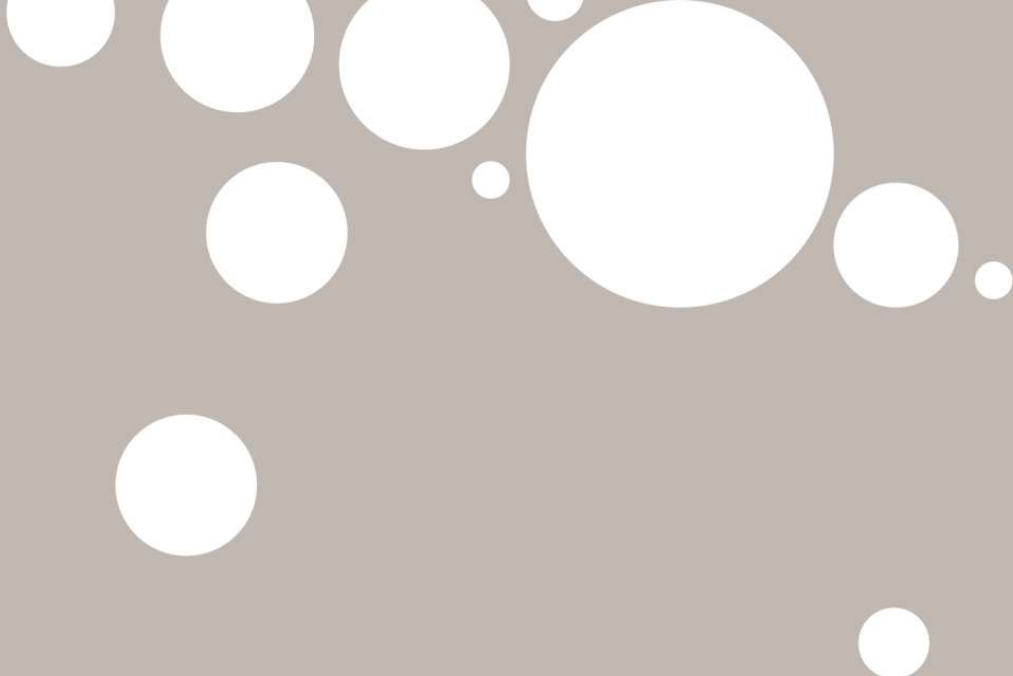
Outcomes per bin – seen vs. not seen OBIR



Groups more/less likely to have recycling bins

65% of households have one or more recycling bins (or alternatives). Some groups deviate from this, as shown below:

- 73% of those who own their home and 60% who privately rent have one or more dedicated recycling bin(s), vs. 56% of those who rent from a social housing provider.
- 73% of WRAP's segment 5 have one or more dedicated recycling bin(s) – this is significantly higher than segment 6 (47%).
- 74% of those who score themselves 9 or 10 out of 10 for motivation to recycle have one or more dedicated recycling bin(s) vs. those scoring 0-6 (53%).
- 72% of those with 10+ rooms have a dedicated bin(s) vs. 60% of those with 0-9 rooms.
- **67% of those who have seen any OBIR advertising have a dedicated recycling bin(s) vs. 59% of those who haven't seen it.**

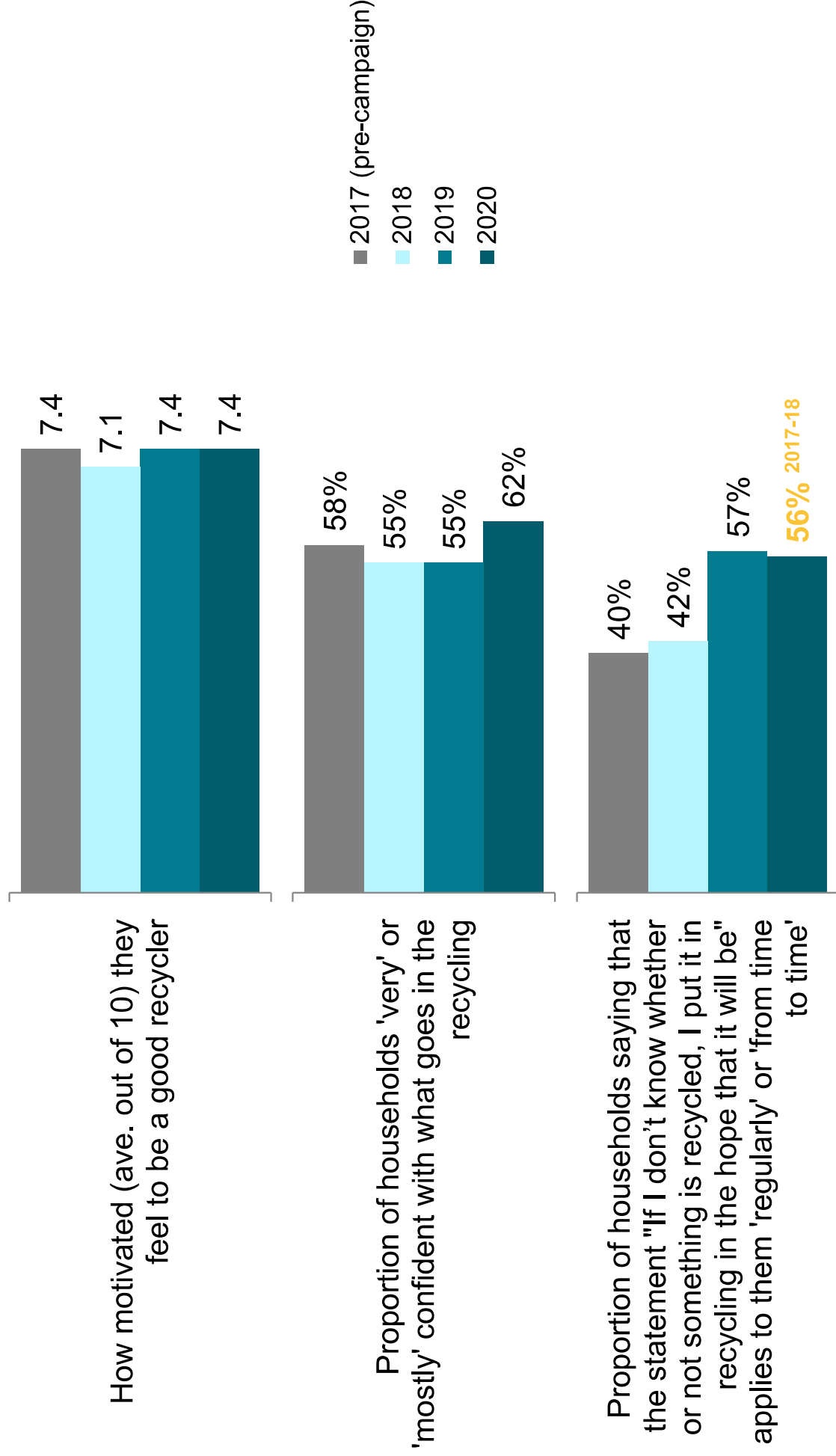


3. Motivation, confidence and social norms

Motivation & confidence – over time

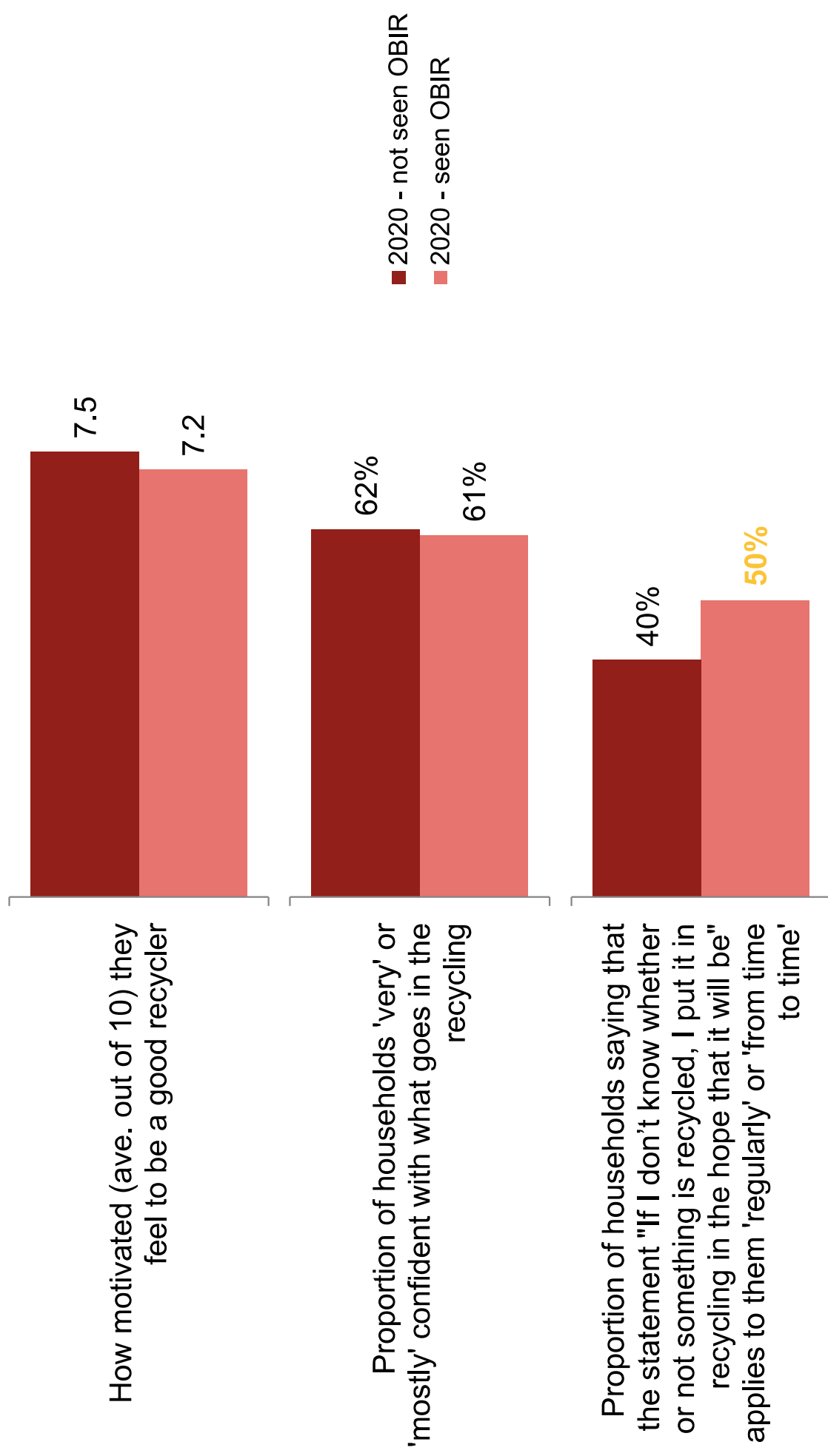


Levels of motivation and confidence among the target audience (as a whole) have remained consistent across the campaign time period. There has been a significant increase in the proportion who would rather “take a chance” and recycle something if they are not sure if it is accepted or not.



Motivation & confidence – seen/not seen OBIR

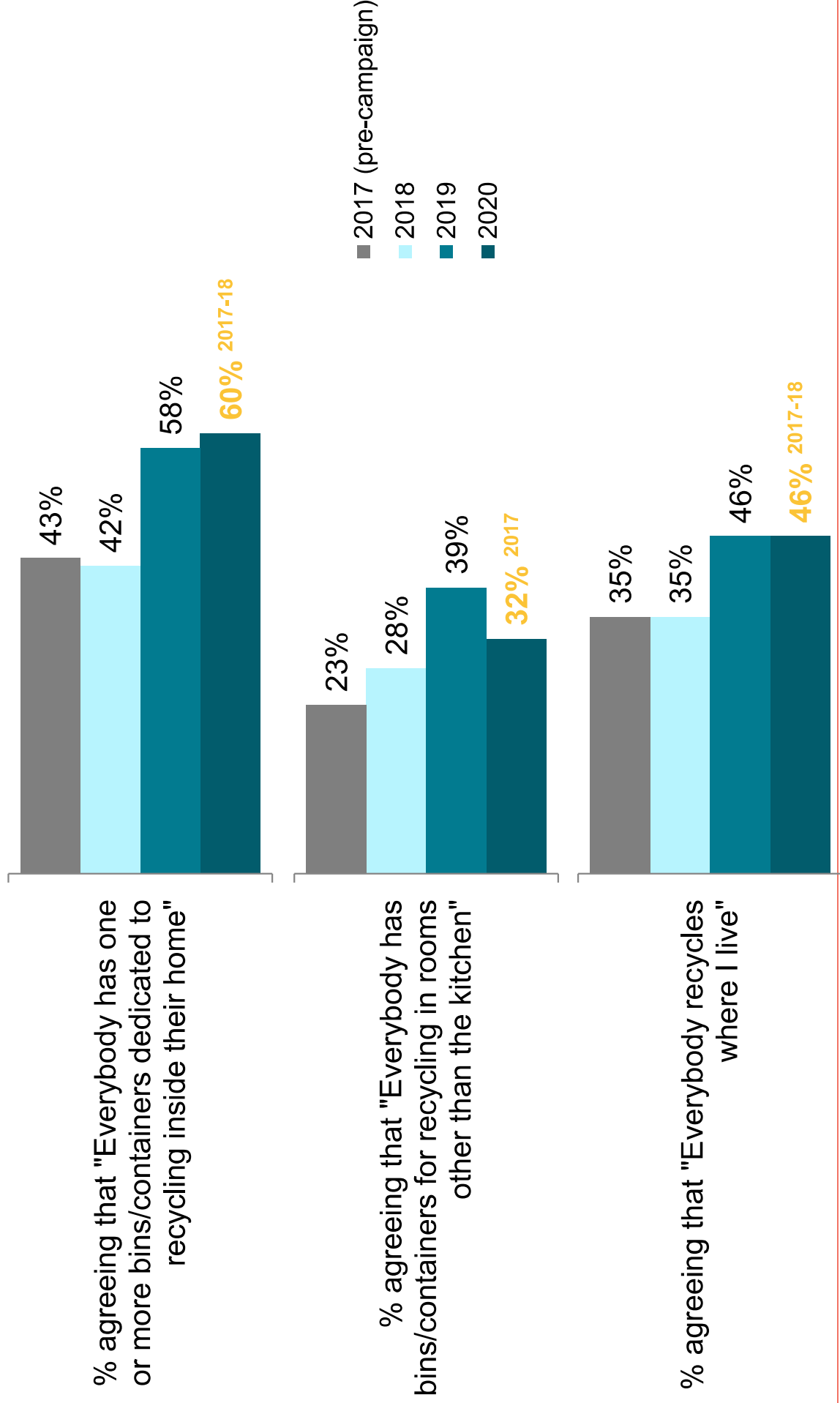
Those who have seen OBIR collateral are equally motivated and confident than those who haven't. They are, however, more likely to "take a chance" recycling items they are unsure about. This suggests that the campaign has had a direct influence and shifted the default disposal assumption for some or the target audience.



Social norms – over time



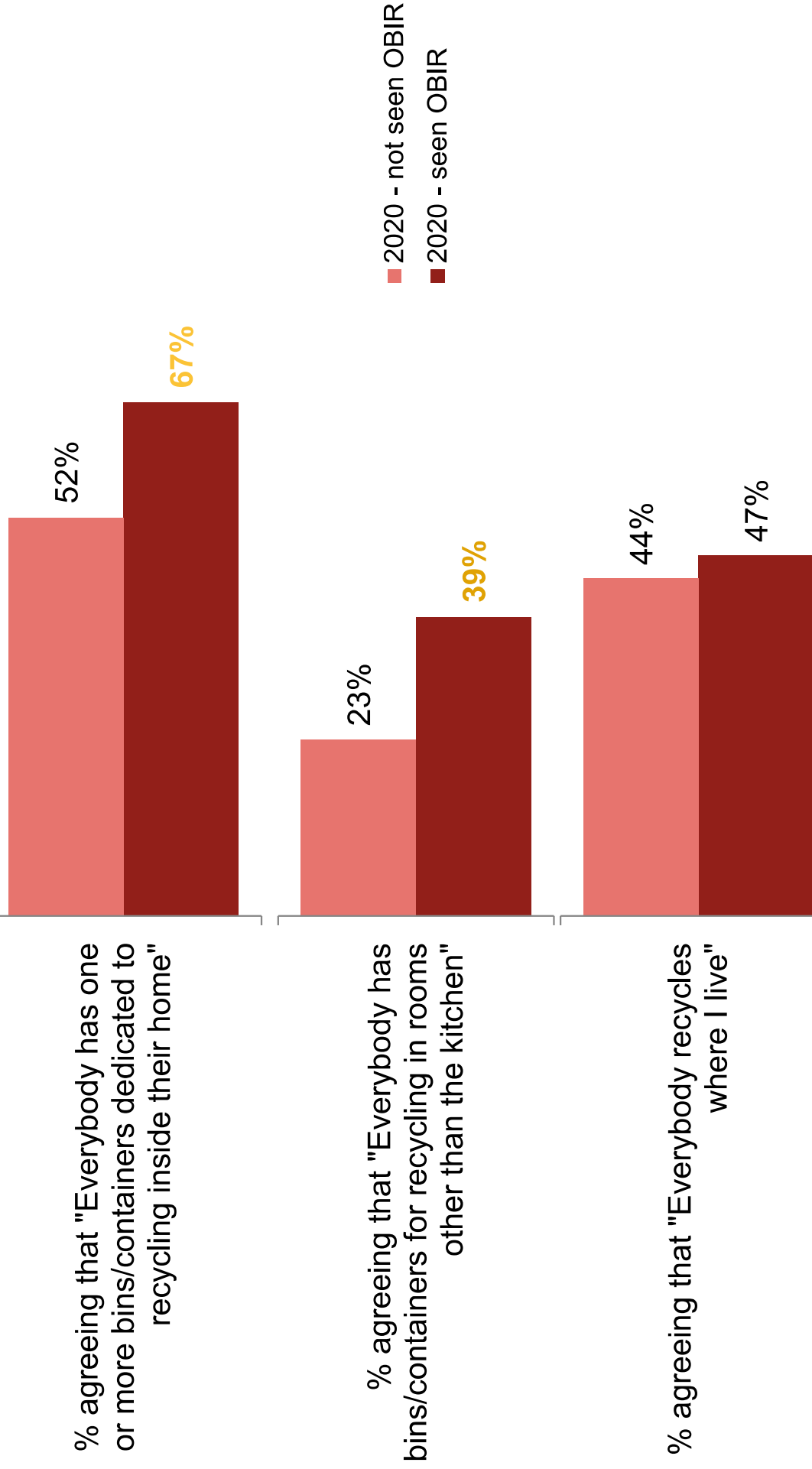
There has been a statistically significant increase in all three norms compared to the 2017 baseline.



Social norms – seen/not seen OBIR



There is a stronger norm regarding having in-home recycling bins among those who have seen OBIR in the past year compared to those who have not – suggesting a direct impact as a result of the campaign. By contrast, there is no observable difference in wider norms regarding levels of recycling in the local area – suggesting the increase in norms seen on the previous slide is the result of external / non-campaign influences.



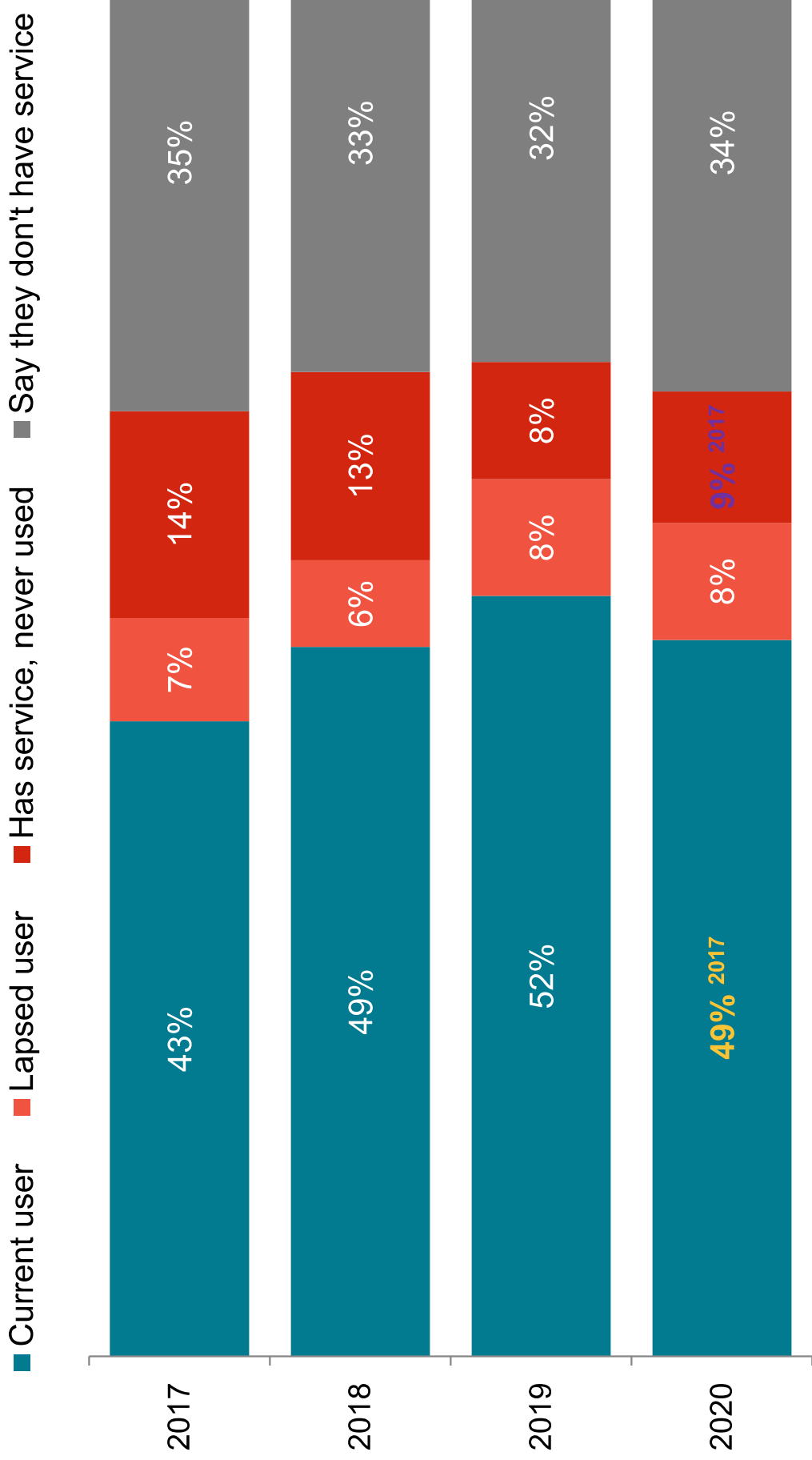
4. The recycling service and their use of it

Food waste



Q1a. Does your council provide a collection for food waste, either mixed with garden waste or not – but separate from general rubbish?

Q1b. Which of these describes your use of the food waste collection service?



Disposal



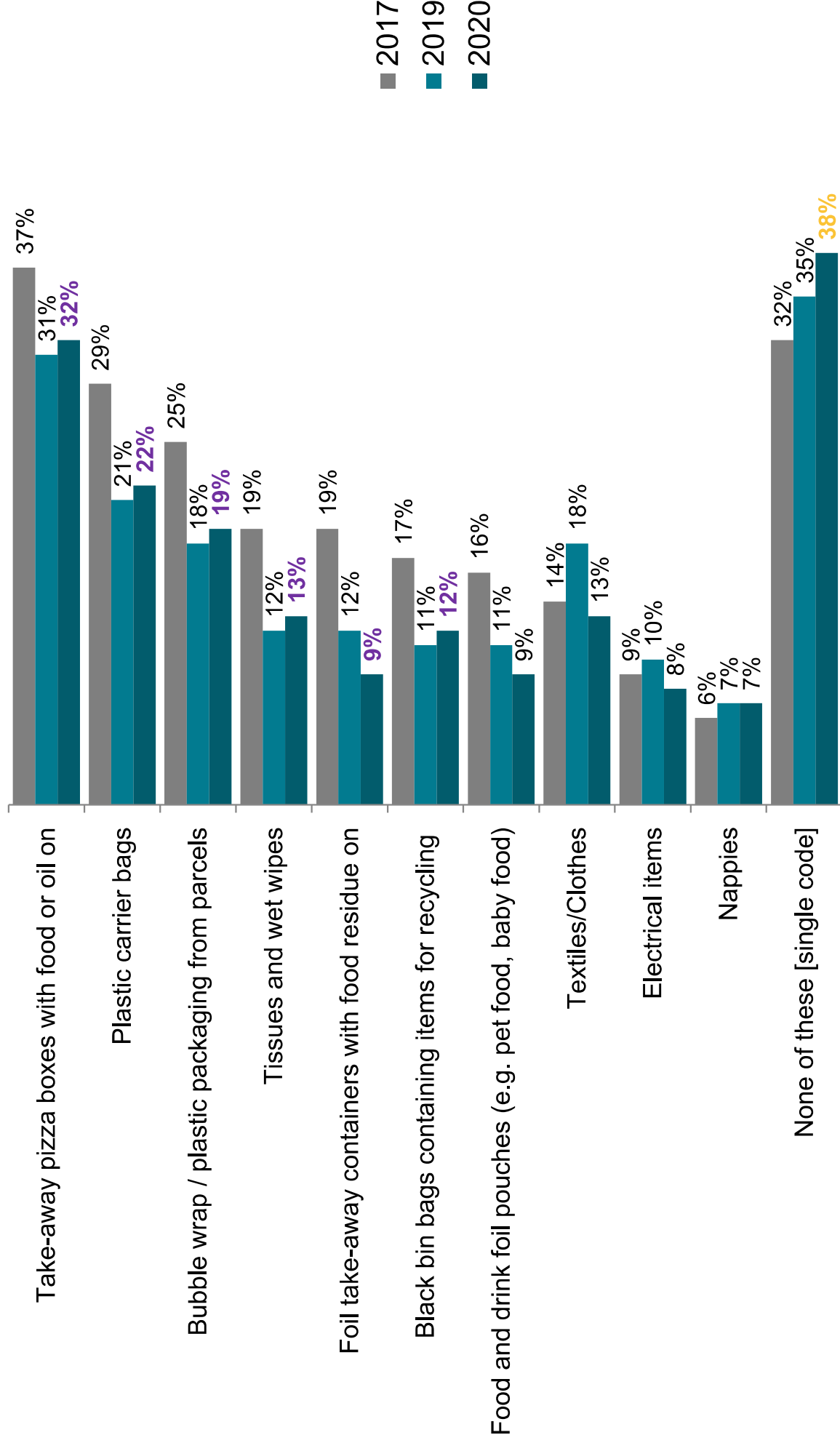
This table shows the proportion disposing of each item in the general rubbish on the last occasion

Item	2017	2018	2019	2020
Paper	17%	18%	20%	20%
Card	14%	15%	13%	14%
Glass	18%	16%	17%	17%
Cans	23%	24%	20%	21%
Aerosols	42%	40%	41%	38%
Plastic drinks	20%	20%	18%	18%
Plastic cleaners	32%	30%	29%	25%
Plastic toiletries	32%	27%	27%	23%
Plastic tubs	27%	26%	23%	21%
Plastic pots	28%	28%	22%	22%
Black trays	41%	42%	36%	36%
Clear trays	36%	34%	28%	29%
Plastic wrapping	51%	49%	44%	45%
Tetra-pak	28%	29%	25%	26%
Foil	58%	57%	54%	53%
Batteries	36%	34%	36%	33%

More serious contamination



Q3. Are there any other items that you put in the recycling for whatever reason that we haven't already asked about?

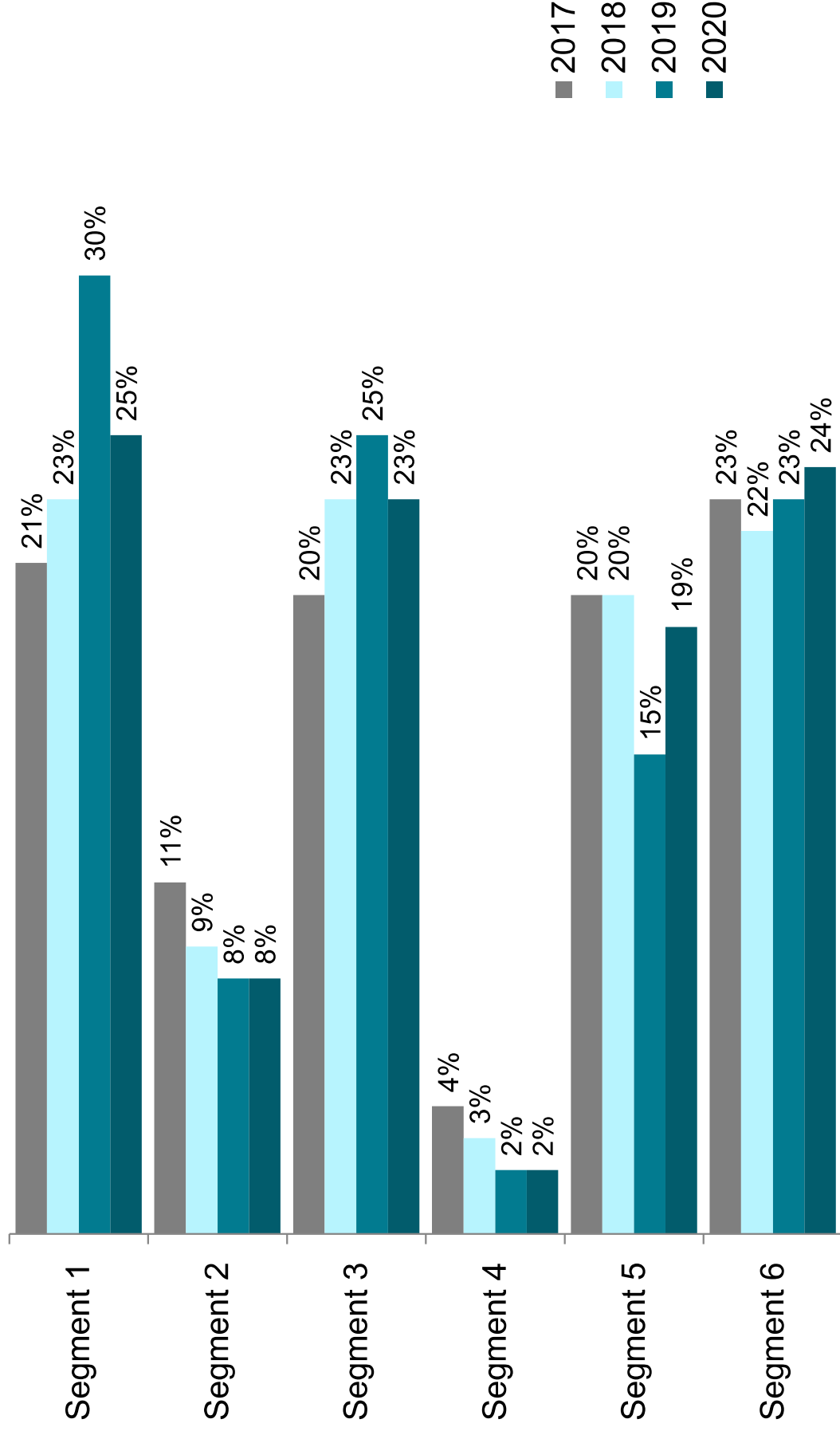


5. Attitudes & segments

WRAP segments



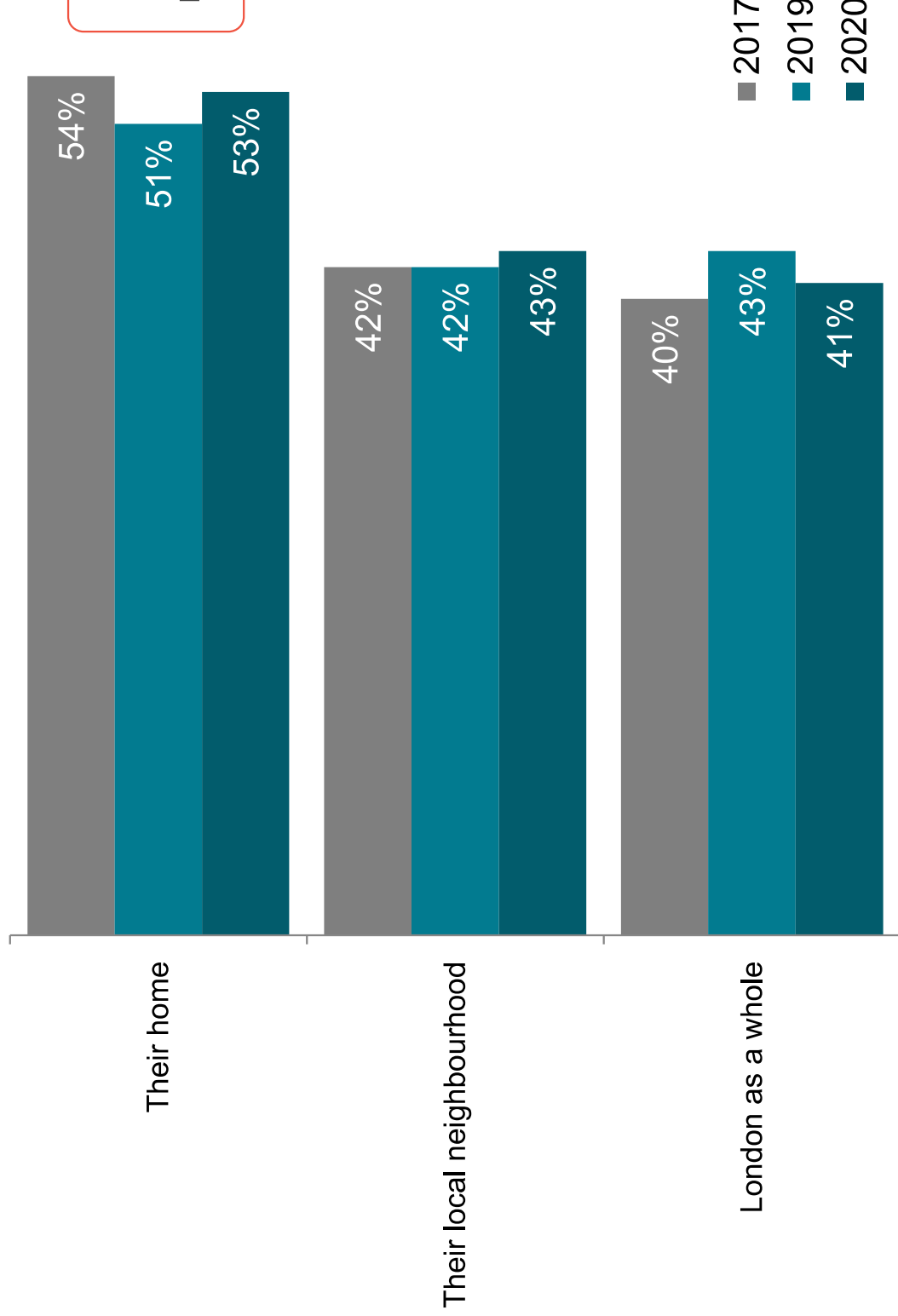
The results demonstrate the profile of the sample according to WRAP's recycling segmentation model. At each wave this has varied – e.g. in 2019 there were significantly more segment 1s and 3s and fewer segment 5s. The 2020 sample is something of a mid-point between 2017 and 2019.



Perceived levels of recycling



Households were asked to estimate the amount of rubbish that went to recycling in a) their home (Q12); b) their street (Q13), and; c) in London overall (Q14).



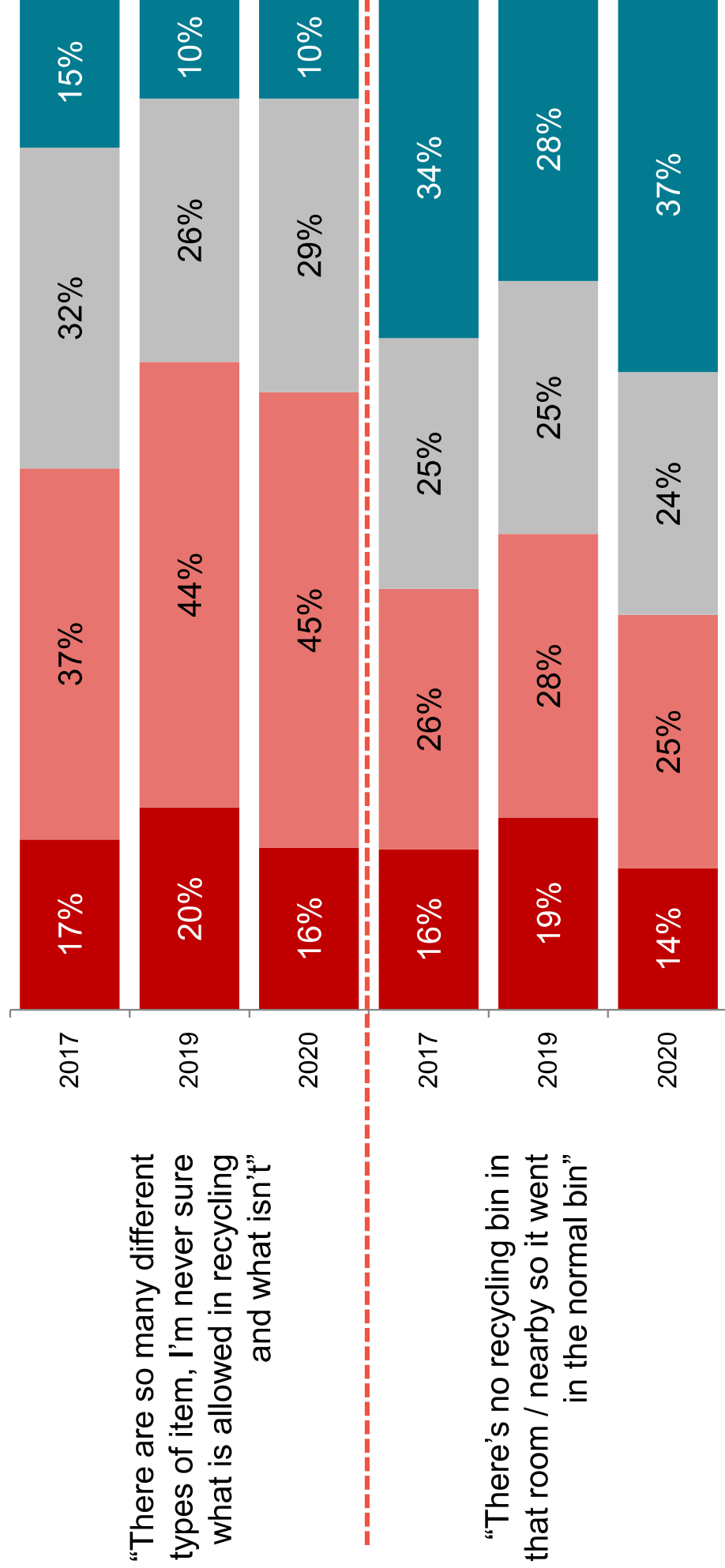
Reasons for missed capture



Q15. Below are reasons people give for why they sometimes put items in the general rubbish bin and not the recycling bin – please let us know how frequently each one applies to you?

- This applies to me on a regular basis
- This applies to me very occasionally

- This applies to me from time to time
- This never applies to me

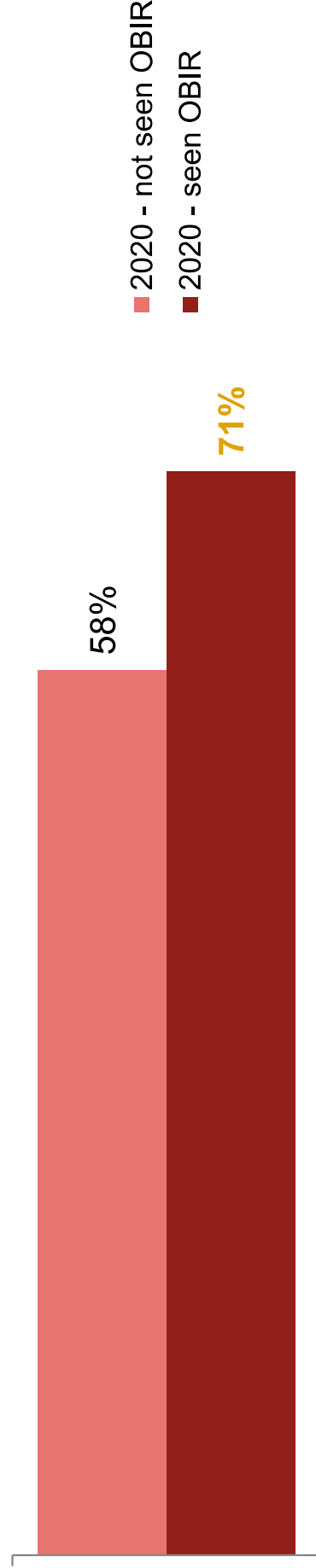
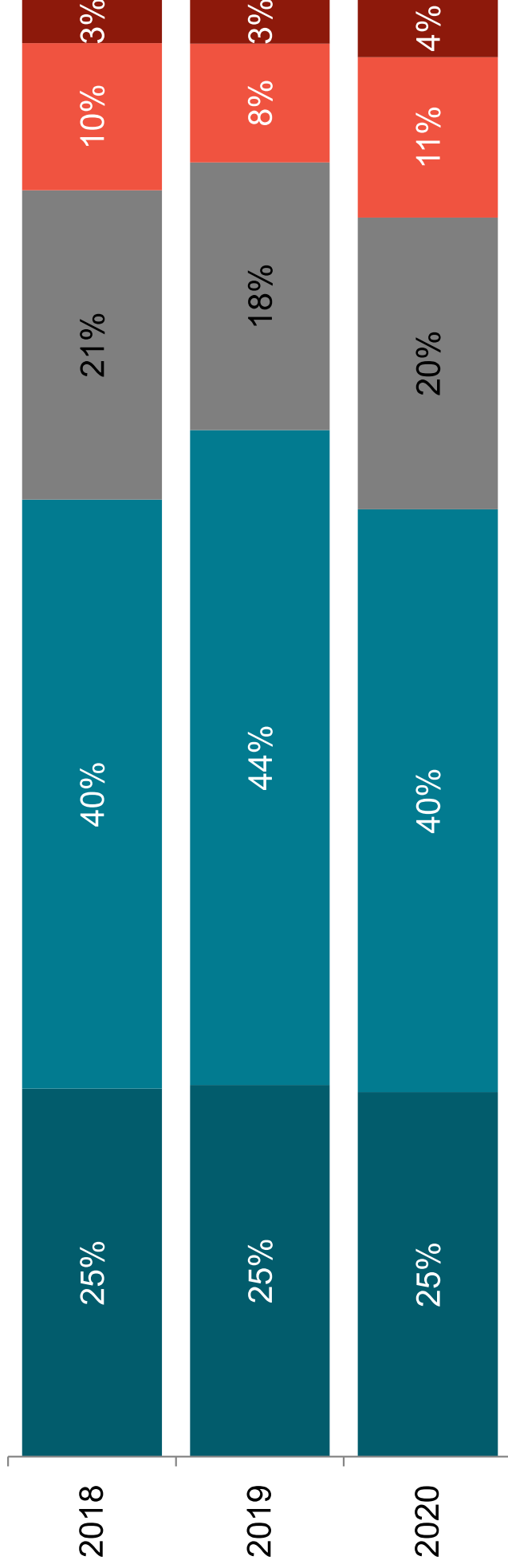


Potential to recycle better



Q19. To what extent do you agree or disagree with the following: I could do better with the amount I recycle

■ Strongly agree ■ Tend to agree ■ Neither agree nor disagree ■ Tend to disagree ■ Strongly disagree

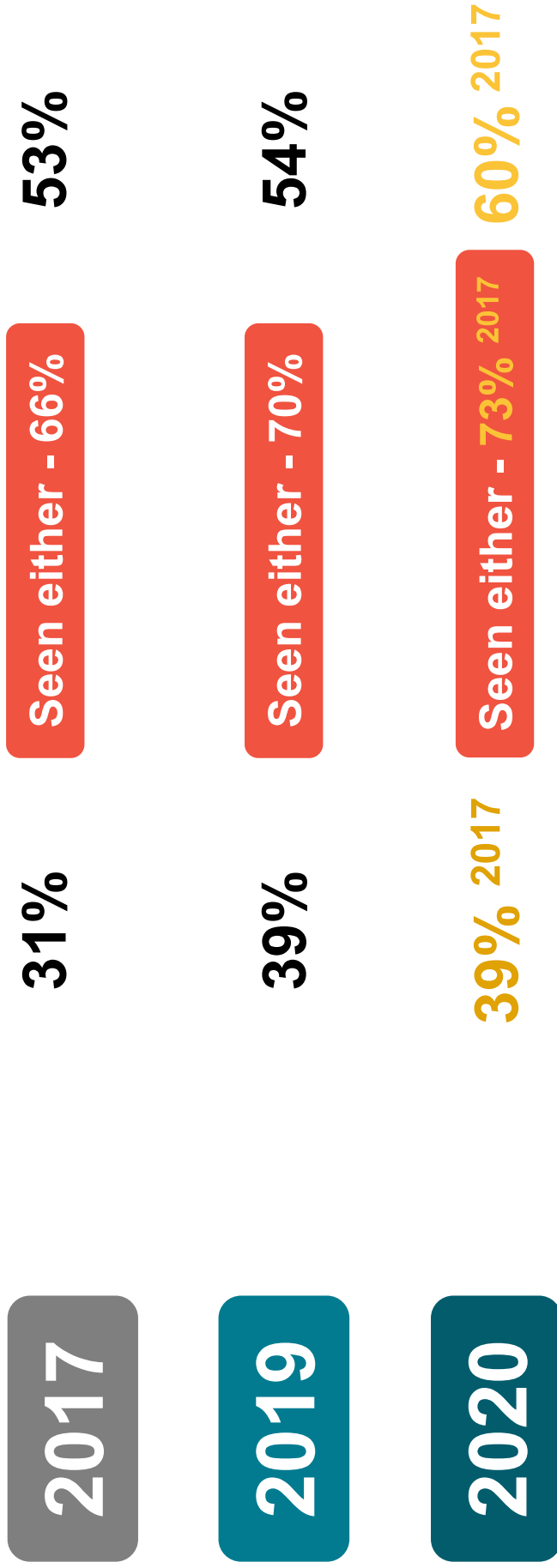


5. Brand awareness

Logo recognition



Q18. Have you seen either of these in the past year?



**If you have any questions,
contact phil@icaro.uk.com**

Overall performance metric



The sample can be broken down as follows:

