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SMEs and Sustainable Waste Management in London Research Findings

A report for: The London Assembly
Environment Committee

Presented by: GfK Business

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CONTENTS

	Page
1. BACKGROUND	1
2. EXECUTIVE SUMMARY	5
2.1 CURRENT LEVELS OF SUSTAINABLE WASTE MANAGEMENT ACTIVITY.....	5
2.2 OPENNESS TO ADOPTING SUSTAINABLE WASTE MANAGEMENT ACTIVITY.....	5
2.3 WHETHER SECTOR DIFFERENCES ARE SIGNIFICANT	5
2.4 KEY BARRIERS TO SUSTAINABLE WASTE MANAGEMENT	6
2.5 THE NEED FOR INFORMATION/ADVICE/SUPPORT	7
2.6 MOTIVATORS FOR SMEs	7
2.7 THE LONDON ASSEMBLY'S ROLE AND THE WIDER WASTE STRATEGY.....	8
3. MAIN FINDINGS.....	10
3.1 UNDERSTANDING THE SME TARGET AUDIENCE	10
3.2 CURRENT WASTE MANAGEMENT PRACTICE	16
3.3 SUSTAINABLE WASTE MANAGEMENT ACTIVITY	36
3.4 ADVICE AND SUPPORT STRUCTURE	46
3.5 CHANGING SME WASTE MANAGEMENT BEHAVIOUR IN LONDON.....	53

APPENDIX – QUESTIONNAIRE/TOPIC GUIDE/SCREENING QUESTIONNAIRE

1. BACKGROUND

The London Assembly's Environment Committee monitors the Mayor's environmental policies for London and is conducting an inquiry into the management of business waste in London, with agreed terms of reference.

The Committee commissioned research to add new knowledge to its bank of information and understanding of the environmental practices of small and medium sized enterprises (SMEs). This research will also contribute to the Committee's inquiry into "how to better engage London's SME sector in sustainable waste management practices, and whether there are changes that can be made to London's advice and support structure to facilitate increased participation".

This research will help to inform a report to be published by the Committee and also assist the Committee in framing its response to the Mayor's consultation on the draft Wider Waste Strategy.

1.1 Research Objectives

The Environment Committee has set out 3 key objectives for this research:

- To understand SME views on the appropriateness of the advice and support structure in London on sustainable waste management
- To determine whether the barriers to sustainable waste management support (either perceived or actual barriers) are sector specific
- To identify possible measures to stimulate greater engagement in London's waste management agenda

The Committee then added detailed lines of questioning, as follows:

- To what extent do SMEs make use of existing waste management programmes, initiatives and support? How useful have they found them? How would they like to see them improved?
 - What problems do SMEs experience in accessing support? Are these problems generic or sector specific?
 - What role do SMEs think that business support organisations and local authorities can play in assisting them to manage waste more efficiently?
 - What are the barriers, perceived or real, to sustainable waste management? Are they sector specific? What is the relevant importance of factors such as awareness of options, opportunity, access to suppliers or to advice, perception of cost, etc?
 - What sort of incentives, financial or otherwise would help SMEs improve their waste management?
 - What are the critical issues for SMEs that need to be covered in the Mayor's Wider Waste Strategy?

In order to meet these objectives, a combined programme of qualitative exploration and quantitative research was conducted. This therefore provides both the required statistical rigour and creative engagement with SME views.

1.2 Overview of Research Approach

In total, this study comprised 330 telephone interviews and 15 depth interviews across 3 important sectors in order to provide key overall quantitative measures and sector comparisons, plus qualitative insights.

After discussion with the Committee, it was agreed that the 3 sectors which are of most interest currently, due to their size within London, the types of waste they generate, and their potential for change are:

- Retail & wholesale: with a focus on cardboard
- Business services: with a focus on paper
- Hotels and restaurants: with a focus on food.

1.3 Sample Interviewed

The SME sample base was bought in from Dun & Bradstreet and the sample structured to provide a good spread by size of business, ranging from micro businesses of under 10 employees to medium-sized businesses of up to 250 employees. The sample was approved by the Scrutiny Manager and used for both the quantitative and qualitative phases.

Quota management was carefully followed during fieldwork, primarily focusing on size of business within each of the sectors. In addition, interviewing took place across the whole of the Greater London region so that each Borough was represented, albeit with only a few interviews in each.

The original intention had been to achieve 510 telephone interviews in total for the quantitative part of the study. However, the interview length was far longer than originally proposed and so it was agreed, after various questionnaire review meetings, that the study should continue with a longer interview and a consequent reduction in interview numbers achieved. In total 330 interviews were completed within the budget available, split as follows:

- retail & wholesale: 114 interviews
- business services: 113 interviews
- hotels and restaurants: 103 interviews.

The hotel and restaurant sector proved more problematic than other sectors as many larger hotels were, in fact, part of larger hotel groups and not free-standing SMEs.

The quantitative data has been weighted to ensure that the final sector data is representative of London, using weighting factors based on the original sample. GfK NOP's team of statisticians was involved throughout, under the overall direction of the Director in charge of the quantitative side of this study: Roger Fisher-Payne. A sample size of 330 (i.e. circ. 110 SMEs in each of the 3 broad sectors) is a robust enough base for clear directional steers to be taken by the Committee. Overall, a

sample size of 330 will provide estimates that are + 5.4% at the 95% confidence level. Individual sectors will slightly under 10% depending on precise sample size for the sector. The data tables provide significance testing on all columns at the 5% risk/confidence level.

The recruitment/screening questionnaires were designed by GfK and approved by the Scrutiny Manager. In addition to sector, location and number of employees, a number of other issues were covered in the recruitment process:

- Issue of franchise inclusion
- Equality & diversity: the overall study naturally includes a mix by age and gender, and interviews with respondents from Black and minority ethnic-run businesses.
- Job title: this was not specified in advance, instead interviewers asked to speak to the person responsible for waste management.

1.3 Quantitative Fieldwork

The quantitative stage took place between 22nd March and 12th April 2007, with a substantial pilot stage conducted to test the length, flow and workability of the interview. This resulted in some questions being excluded in order to keep to the agreed interview length of 21.5 minutes, on average.

The semi-structured questionnaire was designed to cover all the key issues needing quantification, building on the understanding generated by the qualitative interviews. The interview covers SME engagement with the current waste management support structure and their preferences, set against their current level of sustainable waste management activity and their future intentions.

Fieldwork was conducted through one of GfK NOP's own telephone interviewing centres, using the CATI (Computer Assisted Telephone Interviewing) system that allows automatic routing and remote monitoring of interviews. The Sample Management System ensures that quotas are controlled electronically. All interviewers are trained to MRS and IQCS standards.

1.4 Qualitative Fieldwork

The 15 depth interviews were recruited to cover a spread of SMEs across the 3 sectors, with a good mix of respondent type by size of company and location in London (a broad spread across the GLA region in order to reflect differences in Local Authority activity).

The topic guide was carefully designed to provide input to the design of the quantitative questionnaire, to aid understanding of the quantitative results, and to explore key issues in more depth with SMEs. It was signed off by the Scrutiny Manager.

The interviews were scheduled to last up to 60 minutes, and most respondents took the full time allotted. On a few occasions the interview was shorter, due to the relative simplicity of their waste management issues and/or unexpected work pressures. Interviews took place at the respondents' own place of work and they were given an honorarium/thank you for taking part of £60.

Fieldwork took place between March 12th and 9th May 2007, i.e. extending before and after the quantitative stage. The interviews were conducted by a team of 3, led by the Director on this project – Sharon Dimoldenberg. The interviews were all recorded for subsequent detailed analysis, using an XSight software programme.

1.5 Reporting Conventions

NB Throughout this report we have used the general term SMEs/London SMEs when commenting on the overall results for the 330 telephone and 15 depth interviews, for the purposes of brevity. These SMEs do **not** of course represent the totality of the SME base in London as they only cover three broad sectors; however, they do constitute the core target audience for the next phase of the GLA's waste management activity in London.

The data tables for the quantitative stage are provided separately so the Committee or third parties can explore any result in more detail. All quantitative data quoted in this report is referenced against a Table number in the set of data tables.

This report covers both elements of the research, using the quantitative results as the core structure and dovetailing the qualitative results accordingly to add further insight, detailed examples and verbatim comment. The report contains many extra ideas and implications – these arose either from respondents themselves or from our analysis of the findings. The emphasis of the report is on identifying actionable recommendations, both quick wins and long-term strategic direction.

2. EXECUTIVE SUMMARY

2.1 Current Levels of Sustainable Waste Management Activity

1. **Three-quarters of SMEs in London are already taking an active approach to sustainable waste management (77%).**
2. Indeed, four in ten SMEs (37%) state that they have “already acted to reduce waste as much as possible, by reusing, recycling, and generally minimising waste coming into and out of the business”.
3. All this activity is already in place despite the variable approach to recycling services and facilities among individual local Councils across London, despite the absence of any financial incentive, and before a co-ordinated waste information & support network for London businesses has been established/promoted.
4. Active SMEs with small volumes of waste to recycle are often plugging into the domestic recycling service offered by Councils – this indicates the effort some SMEs go to in order to do their bit for the environment.
5. One in five SMEs in London are not doing anything with their waste, other than throwing it into landfill, however. Even among the active waste managers, there is scope for more that could be recycled or re-used or reduced. For example, 24% of SMEs overall throw away their paper, 26% their cardboard, and 40% their glass.
6. SMEs tend to focus on waste disposal, rather than the whole cycle of waste through their business. Thus, when prompted with a list of 10 possible actions, we find that only 3 actions have been undertaken by around half of these SMEs: recycling of packaging/items, resource optimisation, and re-using scrap material in their **business**.

2.2 Openness to Adopting Sustainable Waste Management Activity

1. **Encouragingly, half of these SMEs say they will be more waste aware or active in the year ahead (48%):** just under one in ten SMEs (8%) declare that they will “definitely change some of our waste management practices”, and a further substantial 40% say that they will “consider looking at possible ways to further minimise or recycle” their waste.
2. When prompted on various possibilities, sizeable proportions say they will consider them in future: for example, 23% of SMEs say they would consider improving their quality control and process monitoring in order to minimise waste generated by their business.
3. Simply being involved in this waste survey, thinking about waste and possible actions, has helped to put waste management onto or higher up SMEs’ agenda.

2.3 Whether Sector Differences Are Significant

1. **The key finding is that on many issues surrounding waste there are no sector differences at all, or only minor ones. There are more similarities that unite than differences that warrant separate treatment/targeting.**
2. For example, all three sectors (retail & wholesale; business services; hotels and restaurants) are widely using both paper and cardboard, and many other types of waste; the segment who are very waste active are to be found in all three

sectors; and all three concur in identifying the barriers they face, what would motivate them, and what they want the London Assembly to focus on.

3. **However, it is clear that the hotels & restaurants sector are lagging behind in waste management activity**, and are also more likely to identify various barriers they face. A high 34% of SMEs in the hotels & restaurants sector are inactive on waste, compared to 22% of retailers & wholesalers and 16% of business services SMEs. Their food scraps waste lacks viable solutions, but they are clearly under-performing on recycling cardboard and glass.
4. The other key finding is that there is a great deal of diversity **within** a sector, not only in terms of the types of waste produced, but also in terms of waste volumes and operational constraints. This adds multiple layers of complexity to targeting messages to SMEs by sector.

2.4 Key Barriers to Sustainable Waste Management

1. A variety of barriers affect SMEs' ability to do more/start acting sustainably. They spontaneously identify these issues as their main problems: simply lacking the facilities/equipment, coupled with the actual and perceived costs of doing more waste management, and an honest admission that they do not have **the time/energy to do this**.

Facilities:

- Lack of recycling facilities (nearby) 18%
- Lack of space to store waste for recycling/collection 7%
- Council restrictions 5%
- Supplier restrictions 3%
- Poor waste management infrastructure 2%
- Lack of/infrequent recycling collections 2%

The costs involved:

- Actual cost of recycling/waste management 11%
- Perceived cost of recycling/waste management 8%
- Local Authorities charge to collect business waste 3%
- Cost of waste management outweighs cost to environment 1%
- Congestion charge incurred to travel to recycling facilities 1%

Time:

- Lack of time to devote to waste management/more important things to worry about 14%
- Inertia/laziness/getting people to agree 5%

Lack of information:

- Lack of info/knowledge on waste management 6%

2. Indeed, those SMEs who are currently inactive put the blame firmly on the **lack of recycling facilities** available to them (a high 42%). This absence of the 'tools for the job' for SMEs contrasts with the arrangements for home recycling, where most London Councils make it easy to act by providing separate bins/bags and collection services for many different types of waste.
3. Cost is a complex issue: waste management costs are sometimes unknown and often not aggregated, as there is a tendency for SMEs to feel that they cannot be actively managed/reduced. The average amount spent on waste per month is an estimated £750 (i.e. £9000 per year), but waste costs vary significantly across businesses with some SMEs paying minimal amounts. Hence, cost saving arguments will not be universally motivating.

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4. Lack of information on what to do with their waste is not spontaneously identified as a major barrier. However, it is evident that an education/information campaign to highlight the topic of waste is a key solution (see on), and this in turn will drive the need for information & advice.

2.5 The Need for Information/Advice/Support

1. To date, only one in five SMEs has actually sought out any information and advice on waste management, **primarily basic information on what to do with their waste rather than supplier contact details.**
2. This is because SMEs are self-reliant (as many as two-thirds say they do not have a general business advisor) and also generally passive on the topic of waste management. They have simply not thought they needed any advice, as they feel their waste processes run well, or they only have small volumes, for example. This is also partly due to the absence of stimulus to rethink their waste management: apart from occasional regulatory change, they are not being prompted to think about better waste practices by their Council, the Government, or their commercial waste collector.
3. Moreover, **SMEs' awareness of the range of bodies that can provide waste management advice and support is very patchy:** primarily limited to local/national government agencies, rather than those organisations specifically set up to help businesses with waste. For example, only 15% are aware of Waste Watch and 9% Envirowise, even after prompting.
4. **From the SME viewpoint local Councils are the most obvious and credible channel for information & advice on waste.** Councils have ultimate responsibility for the local environment, for managing waste locally (not only in terms of collection, but also in terms of providing waste facilities/recycling centres), and they also deal with all businesses in their area. Thus, they are seen as the natural, most effective, authoritative channel for any communication with SMEs on waste matters.
5. The proposed portal will need to be well designed so that SMEs can search rapidly for the relevant answers they seek regarding general or specialist waste types, local recycling facilities, and local collection services. Organisations linked into the portal will also need to be able to serve SMEs if they phone or email for advice.

2.6 Motivators for SMEs

1. **The active SMEs are motivated by a desire to care for the environment, to "do their bit" and act responsibly as a business.** Personal beliefs and attitudes among owners/managers towards avoiding waste per se, helping the environment, and helping others can clearly translate into real business action. Home recycling plays its part in this, and also business norms such as of sending ink cartridges back to the manufacturer or a charity.
2. **Other powerful drivers are regulations/compliance (82%), and if extra waste management activity could be shown to be cost-neutral (80%).** Indeed, active SMEs recognise that careful waste management is often more a question of some extra time and effort, than cost.
3. A variety of other arguments also have wide motivational appeal when tested, and can be used in building the case for sustainable waste management. These encompass both self-interest and wider community benefits: for example, 76% of SMEs say they would increase their waste management activity if it created local

jobs/boosted London's economy, 80% if it created local renewable energy schemes, and 77% if it improved their company's image and reputation.

4. Currently, there is minimal supply chain pressure on SMEs – either from customers or their suppliers. Thus, apart from a general desire to have a good reputation, there is little perceived business advantage to promoting their waste practices. Even among the 18% of SMEs which operate in the “green” sector or as a green brand there is no significant booster effect on the way they handle their waste.
5. **Incentives naturally have far more appeal than being coerced by regulations or penalties: 72% say an incentive would encourage their business to do more on waste.** These incentives are primarily financial – ranging from free collections to rebates off their business rates.
6. However, these motivators need to be set against practicalities for SMEs: lack of storage space, very small volumes of waste, and the fact that some SMEs have already done as much as they can. Even with a financial incentive on offer, some feel they simply cannot change/do more.

2.7 The London Assembly's Role and the Wider Waste Strategy

1. **The London Assembly's role is clearly perceived to be: to inform and educate SMEs, to co-ordinate Councils to improve the recycling infrastructure in London, and to campaign on waste issues.**
2. SMEs tend to see their waste as their own responsibility (68%), or their Council's (22%), and so there is a natural mood for both partnership and self-reliance - i.e. getting on and doing it, provided the Council makes it easy for them.
3. The whole waste disposal infrastructure needs to be improved, on a local Council by Council basis, as well as with a London-wide view, so that SMEs are not advantaged/penalised by their location. Creative solutions in partnership with commercial waste collections services may be a solution here.
4. Councils need to accept – and welcome – commercial use of domestic recycling facilities, where volumes are small.
5. Waste budgets will be better channelled into information campaigns and infrastructure investment, than into incentivising businesses.
6. The level of current sustainable waste management activity in London needs to be recognised, with SMEs thanked and encouraged to build on this business norm.
7. The now established norm of recycling at home creates a well-timed platform to build on, as many of the arguments on recycling, reducing and re-using are already being won on a personal level.
8. Waste management/disposal is a daily ingrained routine for owners/managers and their staff. Hence, SMEs need to be jolted out of their typical low attention/“automatic pilot” mode in order to think afresh about their practices and the possibilities - they are not actively seeking out waste information.
9. The first step is education and information, via mailshots and information/promotion campaigns, with further detailed information & support available to suit their waste needs and their location.
10. Given the shared SME perspective on waste across these 3 sectors, the easiest approach is to launch a general business waste campaign. Then messages, case histories, examples available via the portal & the support

network can be organised/self-targeted by waste type, with sector/sub-sector advice where relevant.

11. Many motivational arguments can be deployed, coupled with reassurance about what actually happens to the waste so SMEs know that their extra time and effort is worthwhile. The feel-good factor should not be ignored.
12. Business process improvement can be a useful lead-in to help SMEs re-examine the waste cycle, so encouraging supply chain pressure and waste minimisation. Linking in to other topical “waste” issues can add further impetus to improve SMEs’ processes all round, e.g. reducing energy bills by not wasting heat and lighting.
13. The information campaign needs to address the spectrum of SMEs, helping the inactives to start, helping SMEs see that even small volumes of waste can make a difference, encouraging the actives to move onto other types of waste beyond the obvious categories of paper and cardboard, and encouraging the highly actives to be waste advocates.
14. Over time, the norm for business waste management will therefore move ever higher (although some SMEs will be held back by particular individual constraints).
15. Local Councils are the obvious key channel for SME communication, but their message can be frequently reinforced by the many other bodies that SMEs deal with: national Government level, training/certification bodies (to embed best practice regarding waste), business advisers/trade bodies, plus commercial waste management companies.
16. By avoiding the regulatory route, by showing understanding of the SME viewpoint, and by adopting the right tone in addressing SMEs, the GLA can seek a solution to London’s waste in partnership with SMEs.

3. MAIN FINDINGS

3.1 UNDERSTANDING THE SME TARGET AUDIENCE

3.1.1 The Three Sectors

The 3 sectors have seemingly clear identities/boundaries, but within these are many individual sub-sectors, each with their own special business context and hence their own waste generation processes. In addition, there are other individual factors which affect their waste management behaviour, such as their size and hence the volume of waste generated, their site location which affects their storage facilities, whether their local Council collects commercial waste, and so on - as we shall see throughout this report.

For example, even among the 15 depth interviews **the range of businesses** interviewed was considerable:

- In the retail & wholesale sector, we covered a bike shop with plenty of cardboard packaging, plus many other waste streams such as oil, rubber, plastic and metal, and a travel agent with only small volumes of paper and cardboard.
- In the business services sector, the printer has a wide variety of manufacturing processes to manage, involving metals and chemicals, plus high volumes of paper, while the property developer (who rents via estate agents and has no direct dealing with the tenants) has only very small volumes of paper and cardboard waste in his small office, plus occasional batches of furniture.
- In the hotel & restaurants sector, interviews ranged from a small Indian restaurant with local customers to an upmarket hotel in the heart of London with 100+ staff.
- Moreover, some of the retailers are also offering additional services to both business and personal customer bases, e.g. the locksmith, the kitchen & bathroom retailer, and the car dealer. Thus, the other half of their business is dealing with different waste streams and different staff/procedures.

Implications:

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| <ul style="list-style-type: none">• A sector approach to waste management advice and support is not necessarily as straightforward as it sounds – there are many individual complexities |
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SMEs have a variety of **organisational structures**: 50% of those interviewed are companies, with the remainder equally divided between partnerships and sole proprietors. (Source: Table 4) It is the hotels and restaurants which are most likely to be owned by sole proprietors (a high 40%). A small number of telephone interviews (14 in total) were included with franchises, mainly business services ones.

There is, naturally, some correlation between organisational structure and **number of staff**, but even large SMEs with 50-249 staff can still be sole proprietorships. Three-quarters of London SMEs in these target sectors are very small, with under 10 employees, including both full and part-time staff. (Source: Table 6) Only 5% are medium-sized, i.e. with 50-249 employees.

In terms of **business success/stability**, the vast majority of these SMEs are well established, with 62% having been in business for 10+ years. However, 4% are new start-ups and a further 15% have only been established for 1-5 years. (Source: Table 5) Given the unstable nature of the hotels & restaurants business it is SMEs in this sector which are far newer: a high 16% start-ups and 23% in existence for 1-5 years.

Ideas:

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| <ul style="list-style-type: none">• Targeting start-ups and young businesses provides a key window of opportunity to establish best practice regarding waste management right from the start• Councils are thought ideally placed to raise the issue of waste management when advising new companies regarding their business rates, local regulations etc at a time when owners are keen to learn and take notice• Other relevant bodies requiring new companies to register with them could reinforce the waste message |
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"When you set up in business and you register for your VAT number they should make the owners aware of what their obligations are."
(Bike shop, 1-10 staff, South London)

3.1.2 The Key People

The key person with overall responsibility for waste management is typically the owner, or director/partner, or other senior manager. (Source: Table 1)

However, it is clear that in the business services sector there is a far wider variety of job titles involved: it would appear that the greater simplicity of their waste streams means that responsibility can be devolved further down the chain. Naturally too, larger SMEs with over 50 staff have a range of other job roles able to take part in the interviews.

In the depth interviews, these owners/managers explained how waste management is part of everybody's role in the company. **It is built into everybody's daily and weekly routines as regards what is disposed and where and when.** Waste collection times and frequencies are set by the Council or commercial collectors, and by the volume generated by each SME.

The time spent on waste is therefore typically minimal, a small amount each day as part of a work process (e.g. to flatten cardboard boxes), or an hour a week to clear up, were given as examples.

"1-2% - it just happens. It doesn't take long to throw things in a bin or crush a cardboard carton. It doesn't take much time now it's all set up."
(Charity, 50-250 staff, West London)

Naturally, this is dependant on the size of the business, and for the large hotel more time is spent in the baling of cardboard and the moving of the large waste bins in and out on time to match the different collections for general waste, cardboard,

paper, glass, and cooking oil. However, the key point to note is that this all runs smoothly and efficiently, so that the time spent on waste by staff is still minimised.

It is the owner or director/manager who takes the lead on waste

decisions: they are the ones overseeing business operations and deciding on waste collectors. Thus, their own individual beliefs on waste and their level of environmental concern make a difference to their actions, to their drive and commitment to sustainable waste management activity in their business (see on to section 2.3.2 on drivers).

Where the owners/managers have put in effort to manage their waste sustainability, staff support for this (or at least, acceptance) is clearly evident. This is thought to be for a range of reasons: their staff are also environmentally concerned/active, they are generally supportive as it is the “right thing to do” and they are all recycling at home (the norm now), and also because staff simply follow orders, without debating the issue. There was little evidence in the depth interviews of any significant bottom-up pressure from staff which was driving the owners/managers to act.

Here are some contrasting examples:

- The wholesaler (and assembler) of safety helmets is personally passionate about safety and the environment, and he has trained up all his staff to be as aware.
- In the car dealership, the servicing department has long-established and careful routines relating to oil, batteries, brake fluid, for example, yet the retail/office side has never considered any similar careful separation and disposal or recycling of cardboard or paper. This is despite the fact that the same Director is in charge of both sides of the business, and clearly there has been no impetus from his staff to think about/do this either.

Implications:

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| <ul style="list-style-type: none">• This ingrained routine/minimal involvement with waste disposal makes waste management a low-attention topic, with people on “automatic pilot”• The target audience is definitely at owner/operations director/senior manager level as they organise business processes, and the staff then follow their lead |
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3.1.3 Waste Management vs Other Business Issues

In the depth interviews we briefly explored where waste management fits into their business issues as useful background.

SMEs are focused on making their business a success, thus their top of mind issues are keeping their business going, noting the level of competition, their customer satisfaction, and the state of the economy. In the hospitality sector staffing is also a key issue.

By comparison, waste management typically emerges as a very minor aspect of running their business, a background operational issue which runs smoothly and is therefore on the backburner. Obviously, it can be more of an issue to address for some SMEs given their particular line of work (e.g. using chemicals in the printing process), but once they have found the solutions/a system that works, then it becomes routine and moves off their agenda.

"It's not something that's made a priority; it's just something that we do. It's just become run of the mill - you don't think about it."

(Locksmith, 11- 24 staff, North London)

Indeed, doing this depth interview served to make some SMEs think about this whole topic for the first time in many years, while for those who feel they are already doing all they can it either confirmed their best practice or highlighted new possibilities which they could look into.

Implications:

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| <ul style="list-style-type: none">• SMEs need prompting to think about waste management afresh, to move it up their agenda and give it some new attention |
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3.1.4 Environmental and CSR Engagement

In the depth interviews we asked, very briefly, about wider Corporate Social Responsibility: only one, a charity, was particularly aware/active, as the other SMEs are primarily focused on operating successfully as a business, although a couple of the larger hotels get involved in charity support.

Instead these SMEs have a basic ethic of acting responsibly as a business (as well as obeying any regulations), and the topic of waste management falls squarely into being environmentally responsible. There was criticism of fly tippers, for example, and of those businesses who generally flout appeals to act responsibly.

"Because I know how it affects the environment and I want to contribute to being the solution rather than the problem."

(Hotel, 50-250 staff, Central London)

There is so much in the media nowadays (press, TV, radio, posters) about the environment, from global warming to recycling, that all the respondents in the depth interviews were clearly environmentally aware. On the specific issue of waste management, the problem of landfill sites soon becoming full up was also raised. Moreover, waste is a very tangible problem – they can see it with their own eyes: what they produce in their business and at home, and the litter and waste around them in London.

"Definitely all this sort of stuff about carbon footprint, because there is so much in the media about it; that has definitely made us think more about it, not just in terms of recycling but in terms of everything we do in trying not to leave lights on all the time or leave computers on 24 hours or air-conditioning and switching it off in the winter-time."

(Hotel, 50+ staff working in two hotels, central London)

"Every news bulletin you hear, certainly in the last 6 months, there's concern about the landfill sites, there's something about environmental things."

(Car dealer, 25-49 staff, North London)

Q: What has shaped your attitude to waste?

A: *"Just seeing the amount of waste that comes out of this shop! And the way people just dump their waste everywhere and don't care."*

(Bike shop, 1-10 staff, South London)

Separating waste for recycling is firmly established at home – all spoke, without any resentment or criticism, of the way they now recycle with their local Council. Indeed, the only complaint came from a restaurant proprietor who thought (wrongly) that his local Council does not recycle domestic waste. NB Sometimes they live in the same Borough as where they work, sometimes a different Borough, and so they were able to compare and contrast the Council's approaches to domestic and commercial waste collection.

Home recycling has clearly reinforced the efforts of some SMEs who are managing waste sustainably at work, and it also means that staff understand all about separating for recycling/careful disposal. Staff may need to be trained in the work processes involved, but this is seen as easily accomplished – managers do not need to work hard to gain acceptance and motivation/buy-in.

"I see my neighbours doing it and I see the difference in my bin, so I say, why not do that at the office and look after the office?"

(Photographer, 1-10 staff, South London)

"We did bring it up at a general staff meeting and everybody was into the idea and up for it so there wasn't a huge amount of problems getting everybody on board; everybody recycles at home so everybody was quite happy to."

(Hotel, 50+ staff working in two small hotels, central London)

Implications/ideas:

- | |
|--|
| <ul style="list-style-type: none">• The newly established norm of recycling at home creates a superb platform to build on, to stimulate commercial sustainable waste management activity and so create a new business norm• The contrast between excellent domestic and absent commercial recycling activity by some Councils needs to be addressed: it causes some bafflement and frustration among SMEs• Environmental actions at work can lead to staff thinking about their wider personal environmental impact – this could become a new benchmark set for active SMEs, a higher tier of action |
|--|

In the depth interviews, only one SME fitted into the "green business" category: the bike shop. The owners are personally concerned about the environment, and this naturally links in to their business – both its nature and its practices. They tend to recruit/attract environmentally aware staff, the owners have put a lot of effort into finding solutions to managing their waste, and – as we shall see in section 2.3.4 they are also forcing the pace regarding their customers' awareness of the issue of waste. However, they are not using their waste management as a business generator/differentiator – it is simply how they feel they should behave. (See on to section 2.5.3 for attitudes towards business gain as a motivator)

In the quantitative study, we checked to see how many SMEs are operating within the "green sector" or as a green brand. (We explained if necessary by adding more detail about being environmentally aware or natural or organic, with specific examples per sector.) In total, almost one in five of these SMEs (across all three

business sectors) are operating in the “green zone”: 16% are generally in the green sector, but only 2% have opted to trade as a green brand themselves. (Source: Table 7) It is notable that *all* those who have decided to act as a green brand have been trading for 10+ years – one might have expected a bias to the new companies in search of a new niche business.

However, operating in the green sector does not necessarily lead these SMEs to better waste management practices – as we shall see in section 2.3.1.

3.2 CURRENT WASTE MANAGEMENT PRACTICE

3.2.1 Responsibility for Waste

SMEs typically see that they have prime responsibility for their own waste (68%). By comparison, local Councils are only cited by 22% of SMEs overall.

Near the start of the telephone interview as an opening question, SMEs were asked whose responsibility is waste, in general. (Their answers were largely spontaneous, with a prompt list only used if respondents were unable to answer.) Although it was possible to give more than one answer, the majority of SMEs give only one response – typically either themselves or their local Council.

As the table below shows there are not many SMEs who think to specify that waste responsibility also falls on suppliers or central Government. However, one in eight (12%) believe that waste is a collective issue – with everyone involved, as an individual part of the process. This point of view is rather more likely to be held by the larger end of the SME spectrum: 28% among those with 50+ employees.

Responsibility for waste

Your business/SME directors & managers	68%
The local Council	22% (38% among hotels & restaurants)
Everyone/individuals	12%
Your suppliers	5%
Central Government	4%

Base: All SMEs (330 unweighted base)

(Source: Table 8)

A marked difference emerges here by sector: those in the hotel & restaurants sector are far more likely to assign responsibility to their Council than those in the business services or retail & wholesale sectors – a statistically significant high 38%. However, this still means that just over half of SMEs in this sector mainly see waste as their own responsibility – 53%.

The depth interviews also revealed widespread acknowledgment of their own responsibility, mainly because it is – quite simply – their own waste. Only a few have thought about looking back up the supply chain and putting pressure on their own suppliers to take back waste or to minimise it (see on to section 2.3.4).

They explain that **Councils are seen as a necessary and a natural partner in the whole process. They are responsible for providing the waste facilities - the landfill sites, the dumps, and the recycling facilities - as well as collection services for commercial waste.** There is some blurring here where private companies are thought to run a local Council's waste management site, but the Council is still thought to be the key organiser (and there was absolutely no mention of the regional waste authorities).

"Ultimately, it's the responsibility of the producer of that waste, but then the facilities have to be there, in a cost-effective manner, to manage that."

(Car dealer, 25-49 staff, North London)

"Everybody has a responsibility to minimise their waste but, at the end of the day, it's down to the local Council."

(Kitchen & bathroom retailer, 11-24 staff, South London)

"We need to look at what waste we produce and minimise that; suppliers need to look at the way they package things and the way they send things out and look at how they could minimise their packaging. I think everyone has a duty. And definitely the Council and the government - they're the ones who set up these schemes as well and can legislate. So everybody, from the top down."

(Hotel, 50-250 staff, central London)

During the depth interviews we found that one SME on a trading estate (a large building with multi-occupancy for small businesses) was obliged by their landlord to separate out cardboard waste. We therefore asked about landlord influence in the quantitative study. **Overall, as many as 20% of SMEs declared that they do not have direct control over how they dispose of their waste as it is organised on their behalf by their landlord, with a further 2% saying it is jointly shared with their landlord.** (Source: Table 58) SMEs in business services and the hospitality sector are more affected by landlords than those in the retail & wholesale sector (a low 12%).

Implications:

- | |
|--|
| <ul style="list-style-type: none">• Landlords/managers of trading estates/business parks/serviced buildings can be targeted as a means of reaching out to many SMEs and changing waste practise on a large scale |
|--|

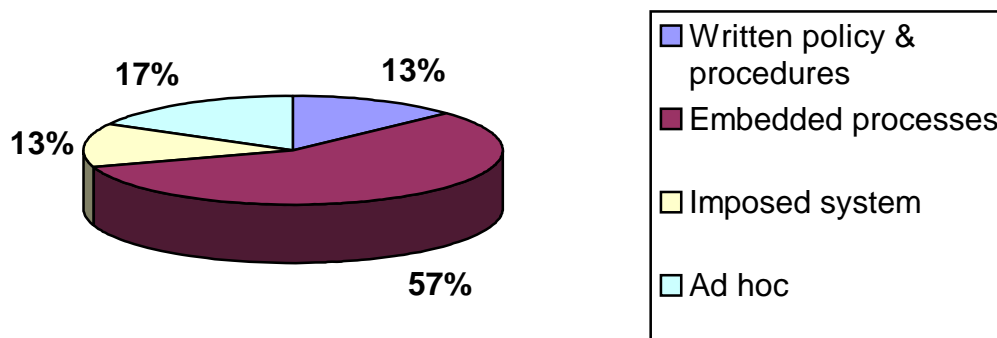
3.2.2 Written Policy vs General Practice

Only a small proportion of SMEs have gone so far as to have "a written policy" and procedures in place to encapsulate their waste management approach – 13% in total.

Instead, the majority have embedded processes/imposed systems, i.e. systems which staff follow regularly but which are not formally written down. These embedded processes are either set up by themselves or part dictated by outside influences, such as their waste collectors or their landlord, as noted above.

However, a significant minority of SMEs – 17%, i.e. one in six SMEs – admit that they have no set waste management system, but instead an ad hoc approach where individual staff are free to decide what to do with the waste.

Waste Management Approaches: Extent of Policies and Procedures



(Source: Table 59)

Base: All SMEs (330 unweighted base)

There are differences by sector and by size, where one would expect processes to need more formalising:

- as employee numbers increase: a third of SMEs with 50+ staff have a written policy, compared to just 11% of very small businesses with under 10 employees
- and in the catering industry with its greater use of part-time staff and its concern over health & hygiene issues: a relatively high 22% have a written policy, compared to 16% in the retail sector, and only 9% in business services.

However, this still leaves most small and medium-sized hotels & restaurants without any written policy – the emphasis is still on embedded and ad hoc processes for waste management.

The ownership structure of an SME does not affect waste management policy – no matter whether an SME is a company, partnership, franchise or sole proprietor, very few have a written waste management policy & procedures. Instead, operating as a green brand or in a green sector has pushed SMEs to create a formal document – a high 32% of them have a written policy.

However, having a waste management policy does not automatically mean that it includes waste recycling or minimisation – it may simply encode poor practice. Indeed, those who say they are not acting sustainably are just as likely to have a written waste policy in place (10%), as those who are managing their waste in an environmentally considerate way (14%).

The reason for emphasising the word “written” in the quantitative interviews is that early on the depth interviews revealed that it was all too easy for SMEs to claim they have a “policy”, when in reality they mean ingrained processes.

"- *We obviously have a waste policy in place.*

Q: Oh do you?

- *Do we?! I'm sure we do somewhere but I couldn't put my hands on it..... or whether it's written. I'm not sure."*

(Car dealer, 25-49 staff, North London)

Small and medium-sized businesses are typically run efficiently through embedded processes that are easily taught to incoming staff; everyone simply knows what they have to do, without the need for any written policies - unlike large businesses.

In the depths, only one (one of the larger hotels) actually has a written waste policy as part of a broader environmental policy, and it is being updated. The boutique hotel and the printer are both in the middle of drafting one: the printer actively so, but while the hotel's Finance Director started this back in September the Hotel Manager thinks it will take years to come to fruition as there are so many aspects to get right (see on to section 2.4.2 on supplier/customer pressure). More detail shows:

- The large hotel is updating its policy, largely as a means of encoding best practice for all their myriad staff, with no intention of making it public to customers. (The manager was able to provide many contrasts to her previous employer, Marriott Hotels, which has a very strong green approach, and which goes out of its way to help staff act in an environmentally sound way, encouraging best practice at home as well as at work.)
- The printer is in the middle of writing one, in order to encode what they already do, and in order to make their customers aware of what they do.

"We feel we ought to, and it's nice to let our customers know that we have got a formal policy. It's becoming more important to people now, not necessarily waste management but environmental concerns."

(Printer, 11-24 staff, West London)

Two other SMEs mentioned in passing that the only written policy they have is for health & safety, and the SME dealing in safety helmets has linked in aspects of their waste management process with health & safety.

Implications/ideas:

- | |
|---|
| <ul style="list-style-type: none">• For SMEs, the focus has to be on changing daily business processes: written policies are alien to SMEs• Linking waste management into health & safety (another topical business issue, and one with regulatory and insurance/financial implications too) may be a fruitful catalyst for encouraging more SMEs to rethink their waste practices• Providing real examples of best practice ideas from similar/larger companies can show others the way forward/what is possible |
|---|

3.2.3 Types of Waste Generated: Overview

These three business sectors were chosen for the Environment Committee's research because they generate considerable volumes of paper (the business services sector), cardboard (the retail & wholesale sector), and food (the hotels & restaurants sector).

In fact, all three sectors generate significant levels of paper and cardboard, and even food waste occurs in some business services and retail SMEs.

	SMES overall	Hotels & restaurants	Retail & wholesale	Business services
Unweighted base	330	103	114	113
	%	%	%	%
Paper	82	52	72	97
Cardboard	76	79	83	70
Food	N/a	100	28	30

Glass and plastic are also a significant waste issue for these three sectors, due to their volume and potential for recycling.

Many other waste streams are also generated by these SMEs, each with its own sustainability issues, even if the volumes involved are small or infrequent.

The full list of waste generated by these SMEs overall is as follows:

Types of Waste Generated: Prompted

	SMES overall
Unweighted Base = all SMEs (330)	%
Paper	82
Cardboard	76
Plastic	38
PC consumables, eg ink cartridges	36
Food	28% for retail/wholesale 30% for business services and 100% for hotel/restaurant sector
Computers and hardware, eg printers	18
Glass	16
Electrical and electronic items	15
Furniture	11
Metal	6
Oils	3
Toxic chemicals	3
Wood/waste/dust	1
Tyres/rubber	1
Clinical/medical	1
Fabrics	1

and a further 3% gave other answers
(Source: Tables 9 and 30)

Implications/ideas:
<ul style="list-style-type: none"> • The main waste streams are an issue for all SMEs, whatever their sector, or sub-sector • The need to address specialist waste streams (e.g. due to toxicity, or value, or bulk) could provide the catalyst for SMEs to apply better waste management principles across their core waste too

In the depth interviews, there was a similar prompt list, but it was noticeable that people could simply forget about whole types of waste, because they classified the material in a different way/category. For example:

- the large hotel is recycling its paper waste, but this is purely office paper. Paper hand towels were therefore thrown in the general waste bins
- the locksmith and the bike shop's staff mainly focus their efforts on the major cardboard boxes, with small cardboard containers sometimes being thrown away
- the locksmith had talked early on about left-over metal, carefully separating out the brass from other metal, which is stored in 2 special bins and then recycled via a local scrap metal merchant. However, at the very end of the interview, as an after-thought he suddenly recalled that he has a whole room

upstairs stacked with circ 40 old metal safes. He used to try and sell them on to gun-owners, but gun law has changed. As they cost £100-150 per safe to dispose of (they need to be cut up into sections), he only disposes of a few per year to ease the cost burden, and simply stores them as he has spare space.

Implications:

- | |
|---|
| <ul style="list-style-type: none">• SMEs need prompting to think about all the various types of waste they generate, as it is all too easy for them to focus on the major elements and to overlook some waste streams which may be very easy to divert from landfill• This is where an industry sub-sector approach could pay dividends by addressing waste streams of direct relevance, using their terminology |
|---|

3.2.4 How Waste is Handled: Qualitative Overview

Before we cover all the quantitative feedback on waste management for each individual waste stream, it is useful to provide a brief overview on how waste is handled from the qualitative interviews.

Waste handling means that separation, storage and collection/disposal solutions all need to be found, and integrated into daily business routines, and made to work given any constraints formed by their own building or the access route for the collection services. (See on to section 2.3.2 re barriers in waste management)

Separated waste can be recycled or suitably disposed of, and so there can be a slight blur over what actually happens to their waste when it leaves their premises. There is a certain level of assumption that the Council or their waste collector is doing “the right thing”.

The disposal/recycling side can be very simply handled by their local Council collection service or by a commercial waste management/recycling company, or it may involve sourcing a specialist waste handling company, eg for chemicals.

However, a key finding is that these SMEs are often using domestic recycling schemes or Council dumps for their commercial waste. While a couple spoke of taking bulky waste to Council dumps and paying for their commercial waste by its weight, others are putting their paper, cardboard, and PC hardware though the domestic side.

In the depth interviews these people explained that they wanted to recycle and this was the solution they had found for their small volumes of waste. These SMEs feel they are doing their bit for the environment, and there is no indication of their trying to avoid commercial waste charges – they simply see this as a way to fill a gap in the current waste service provided to their company. Indeed, it takes a certain effort to do this: they are doing the delivery in their own time, even at weekends, in their own cars.

Examples include:

- The travel agent who feeds office paper and old travel brochures into the local high street paper recycling bin near his office

- The photographer who takes home all the little plastic film canisters and puts them in her plastic recycling box (NB no feedback from local Council to say this is not OK)
- The locksmith who gradually builds up a car boot-load of cardboard and then transports it home to Hertfordshire to take to the local dump for recycling at the weekend, as the local Council where his business is does not seem to have a recycling centre

One committed environmentalist, the headgear wholesaler, is particularly irritated by the reception he gets at local Council tips. He is going in to try to recycle material of various kinds and is treated as the enemy:

"The white van man, and everyone hates you. Going to the local dump in a van with industrial bits is a real issue."

(Headgear Wholesaler, 11-24 staff, South London)

Implications:

- | |
|---|
| <ul style="list-style-type: none"> • Councils might need to clarify and consider creating a new approach to SMEs with small volumes of recyclable waste, and to welcome SMEs who are doing "the right thing", this may mean that you should consider not charging for the service. |
|---|

3.2.5 Explanatory Notes For Data on Waste Generated and How Handled

In the next section we will cover each main type of waste, detailing the key quantitative findings and any key issues raised in the depth interviews.

For each type of waste covered in the quantitative study we determined:

- a) what percentage it contributes to their monthly waste
- b) and how they dispose of it.

The disposal question was largely straightforward – a pre-coded list of likely answers was provided which interviewers used where necessary, but SMEs were generally easily able to answer spontaneously for each type of waste. All answers are summarised in Table 52, with the full range of answers given, from throwing away in their general waste through to far more unusual approaches such as donating to a charity, returning to a supplier, incinerating or warehousing the waste.

We have focused here in the report on the percentage of SMEs who simply throw this waste into their general waste bins, rather than taking the trouble to separate them out to recycle them or for special disposal. There were three answer categories on the questionnaires relating to recycling, as follows:

- Recycle through waste management company
- Recycle through domestic channels (i.e. in recycle bins at home)
- Recycle through community recycling bins on high street.

We captured answers to these three separately and have also combined them to provide a net figure of SME "recycling" activity in the data tables. However, we would caution that the first category may possibly overlap with another category: Set aside for company who deal in specific waste type collection e.g. electrical waste.

This is because in the depth interviews SMEs were sometimes a little unsure about whether the specific waste collected was actually going to be recycled as opposed to being disposed of responsibly.

Individual Waste Streams: Percentage of SMEs generating, estimated volume, and whether going to landfill

In this section we report back on each type of waste. In section 2.3.1 this is all pulled together for an overview of SMEs' current approaches to waste management.

a) Paper

- 82% of SMEs generate paper waste **(one would have expected 100%, which shows that SMEs are prone to discount a type of waste if they do not generate much of it).**
- **There is a marked sector difference, as would be expected: 97% for business services, 72% for retail & wholesale and only 52% for hotels & restaurants. Nonetheless, that still means that paper waste is a significant issue for the hospitality sector.**
- **Paper represents, for the average SME, 57% of their monthly waste. This ranges widely from a high 73% on average for business services, dropping to 37% for retailers, and falling further to 17% for hotels & restaurants.**
- **Many SMEs are already recycling/separating their paper, but 24% of SMEs simply throw their paper waste into their general waste bins.**
- **Sector differences here appear very marked, but they are not in fact statistically significant given the reduction in base sizes. As expected, given the volume of paper waste it is the business services sector who are most likely to be active: only 18% throw their paper away, compared to 28% in the retail sector. By contrast, 55% of those in the hospitality sector throw their paper away.**

(Source: Tables 9, 10 and 32)

Paper is easily recycled as this is a long standing issue/service, so in total 66% say they do this: 45% recycle through their waste collector, 15% take their paper to local recycling containers (eg on the high street), and 6% recycle their business paper at home through their domestic collection service (obviously they have small volumes of paper to recycle). A further 6% say they take their paper to their local tip, maybe to a recycling facility there.

In the depth interviews we found that the Data Protection Act meant businesses often shredded confidential paper and were minded to dispose of paper waste in a cautious way. If they used a shredding service, they were not necessarily aware, however, what the company then did with the shredded paper - it was simply assumed that it would be recycled.

b) Cardboard

- 76% of SMEs generate cardboard waste (**one would have expected 100%, which shows that SMEs are prone to discount a type of waste if they do not generate much of it**).
- **There is no statistically significant sector difference here**, although the retail sector is highest, as expected: 83% for retail & wholesale, 79% for hotels & restaurants, and 70% for business services.
- **Cardboard represents, for the average SME, 34% of their monthly waste. This ranges widely from a very high 54% on average for retailers, to 25% for hotels & restaurants, and 17% for business services.**
- **Many SMEs are already recycling/separating their cardboard, but 26% of SMEs simply throw their cardboard waste into their general waste bins.**
- Contrary to expectations, it is the business services sector who are most likely to be active: **only 20% throw their cardboard away, compared to a slightly higher 26% in the retail sector, despite the large volumes the latter generate. By contrast, a high 48% of those in the hospitality sector throw their cardboard away, a statistically significant result.**

(Source: Tables 9, 11 and 33)

Cardboard is easily recycled/separated, and this is a long-established practice/service. So in total 61% of cardboard users recycle it: 42% recycle through their waste collector, 14% take their cardboard to local on-street recycling containers, and 6% (primarily the business services SMEs) recycle their business cardboard at home through their domestic collection service (obviously they have small volumes of cardboard to recycle). A further 8% say they take their cardboard to their local tip.

A few retailers/wholesalers in the telephone survey say they also re-use the cardboard, and examples of this emerged in the depth interviews, e.g. retail staff can re-use boxes at home, and one hotel even keeps the odd one for his guests. The keen environmentalist wholesaler has a 100% re-use policy, not only for the cardboard that comes into his company, but also plastic bubble-wrap (see on to plastic).

"I have a policy that every box we get into the company, we never buy a box, we always re-use boxes, re-use packaging. It was a conscious policy, it saves money and it's a good, clean policy."

(Headgear wholesaler, 11-24 staff, South London)

c) Food

Only around three in ten SMEs in the non-food sectors say they have any food waste at all: **30% among business services and 28% among retail & wholesale companies.**

From the depth interviews we find that this is due to various reasons, e.g. because SMEs do not allow staff to eat on site, or because the amount of "food" waste is so minimal (the odd tea bag per day, a leftover bit of sandwich), or is food packaging instead, and so they tend to dismiss this as a waste stream.

For them food represents only an estimated 13% of their monthly waste, on average, and is typically simply added to general waste.
(Source: Tables 9, 18 and 40)

The hotel & restaurant SMEs were asked about their various types of food waste in more detail, separating out edible food from other food categories plus cooking oils and plastic items.

The table below shows how **this food-related waste is mostly all simply thrown away by hotels & restaurants, with the one exception of cooking oils** which are a regulated waste material and must be stored for specialist disposal.

Types of food waste generated by the hotels & restaurants sector:

Base: All in hotels & restaurants sector (103)	% of hospitality SMEs generating this type of food waste	Average estimated volume, as a % of their overall monthly waste	Main approach to waste disposal
Type of food waste:			
Edible	78	36	69% throw away as general waste
"Rotting"	43	13	73% throw away as general waste
Cooking oils & fats	62	14	A mere 12% say they throw this away (perhaps meaning solid fats here)
Plastic packaging [^]	37	12	51% throw away as general waste
Plastic cutlery, plates, cups [^]	18	8	53% throw away as general waste
(Source: Tables 9, 19-24 and 41 - 46) NB [^] = Caution: small base sizes			

A small number of SMEs in the telephone study are involved in community or charity food donations, but this can only be where suitable food is being left over, of course. In talking to the hotels & restaurants in depth, it is clear that the food waste they generate largely consists of inedible leftovers (either cooked and discarded food, or peelings etc). This is because catering establishments want to minimise edible food waste as this affects the business's profitability. Their staff will also eat in-house, another way of "re-using"/minimising genuine food waste.

"You have a daily menu so you can reduce waste and ensure good stock rotation – training, so you're using the right proportions and not throwing things away."
(Hotel, 50-250 staff, central London)

A few comment on the absence of pig bins nowadays, but they do not see this as realistic in London, and separating out waste which could be composted would be cumbersome. Their priority is to keep their kitchens running smoothly and to get rid of the waste as soon as possible to avoid hygiene problems, and also customers being offended by smells or by seeing rubbish waiting to be collected. In order to avoid leaks, smells, pest problems, they put their food waste into black bags before putting them into the bins/bags provided by their Council/waste management company (i.e. double-wrapping).

"We don't want to encourage pests - if we did that we would probably have to keep it on site for a week because they wouldn't collect it every day, but our rubbish gets collected twice a day and I just don't know if it's something we would want to keep on site. It's something we would consider, but it's just from a practical point of view."

(Hotel, 50-250 staff, central London)

d) Plastic

- 38% of SMEs generate plastic waste.
- **There is no statistically significant sector difference here:** 46% for hotels & restaurants, 43% for retail & wholesale, and 32% for business services.
- **Plastic represents, for the average SME, a relatively small 15% of their monthly waste. Naturally, it is more of an issue for retailers – 19%, compared to 10% for the other two sectors.**
- 49% of these SMEs simply throw their plastic waste into their general waste bins.
- **Both retailers and the hospitality SMEs are highly likely to be throwing plastic away, instead of separating/recycling: 56% and 60% respectively, compared to a somewhat lower 39% among business services SMEs (NB although this result is not statistically significant).**

(Source: Tables 9, 13 and 35)

The headgear assembler/wholesaler minimises waste by re-using wherever possible – re-using the plastic bags and the bubble wrap that his suppliers use to wrap around his own products

The main issue here is that plastic recycling is a complex sorting process, as not all plastic can be recycled. The printer, for example, sends his large empty plastic containers back to his supplier – the assumption is that they are re-used.

"Plastic recycling is a bit iffy, and I know it is at home because there are certain things they can take and certain things they can't cause they are not pure plastic."

(Printer, 11-24 staff, West London)

e) Glass

- **16% of SMEs generate glass waste.**
- **There is a significant sector difference here, with the hotels & restaurants sector highest, as expected: 52%, dropping right down to 15% for business services, and to only 6% for retail & wholesale SMEs.**
- **Glass represents, for the average SME, 17% of their monthly waste.** This reaches a high 32% of average monthly for hotels & restaurants, hence the importance of managing this waste stream across London. **By comparison, among retailers and business services SMEs glass only amounts to 6-8%, by volume, on average.**
- 40% of these SMEs simply throw their glass waste into their general waste bins. **Moreover, the hotels & restaurants are just as likely to be doing this as the other sectors (40% vs 45% for retailers and 37% for business services).**
- **The volume of glass involved can make a difference here – it is possible for some SMEs, across all three sectors, to recycle their small volumes of glass through the Council's community recycling bins in the area, or even by taking them home to recycle.**

(Source: Tables 9, 12 and 34)

In the depth interviews, respondents in the hospitality sector dealing with large volumes of glass explain that there are health and safety issues with glass – broken glass needs to be dealt with carefully (e.g. boxed or wrapped). Empty bottles can attract fruit flies and create a lot of noise for local residents when the glass bin is emptied.

Ironically, one small restaurant owner is proud to use glass bottles instead of plastic, but he has not thought to complete the environmental circle by recycling them – they are simply thrown away in his general waste.

f) PC Consumables (e.g. ink cartridges)

- 36% of SMEs generate PC consumables/ink cartridge waste (again, the amount involved is so inconsequential that these respondents have not included it.)

There is a significant sector difference here, with a high 57% of SMEs in the business services sector involved, dropping right down to 18% for retail & wholesale, and to only 8% for hospitality SMEs.

- PC consumables/ink cartridges represent, for the average SME, only c6% of their monthly waste (possibly as some ink/toner cartridges can be of significant size for the large photocopiers).
- PC consumables are unlikely to be thrown away: only 17% of SMEs include them in general waste. Instead, there is a lot of recycling/reusing activity – returning them to the manufacturer or a charity.

(Source: Tables 9, 16 and 38)

This was taken to be standard practice in the depth interviews: ink cartridge manufacturers and charities have set up easy return systems for SMEs via return envelopes with free postage, with frequent marketing/reminder activity to SMEs to encourage them to do this. There is no financial benefit to the SME in doing this – instead it provides a general feel-good benefit: someone else can re-use it and get the benefit, and it is not going into landfill.

Implications:

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|---|
| <ul style="list-style-type: none">• The ink cartridge waste stream has been transformed by high level activity to alert SMEs to take the effort to separate and return them: this provides a useful model to transform other specific waste streams |
|---|

g) Computers and hardware (eg printers)

- Only 18% of SMEs say they generate PC hardware waste (even though all SMEs will have printers and PCs).
- There is again a significant sector difference here, with a high 34% of SMEs in the business services sector involved, compared to minuscule proportions for the other 2 sectors: only 4% for retail & wholesale and 2% for hospitality SMEs. Clearly, the office focus of the business services sector means a far higher involvement with/turnover of PC hardware.
- However, PC hardware is an infrequent waste item. It represents, for the average SME, only an estimated c4% of their “monthly” waste.
- Base numbers are small here, but it is clear that PC hardware are unlikely to be thrown away with their normal waste: only 10% of SMEs include them in their other general waste.
- Instead, PC hardware is separated for specific disposal – either to a special waste collector, or back to the original supplier, or recycled in some way. 8% of SMEs donate these to charity.

(Source: Tables 9, 15 and 37)

A relatively high 16% of SMEs with PC hardware to dispose of say they take it to the local tip. In the depth interviews this waste disposal solution also emerged – one respondent explained that he was simply repeating what he does with his home computer, so automatically following the solution he knew existed.

In both the quantitative and qualitative studies we also find a few SMEs who are storing PC hardware: uncertainties over the Data Protection Act and worries over data security meant that they did not want to throw the hardware away. As they had spare storage capacity, it was not a pressing problem to find a solution.

"Most of them are in an office over there because of the DP Act - we store them. But due to the WEEE legislation we can't bin them anyway so we'd have to take them to a recognised dump"

(Printer, 11-24 staff, West London)

The charity, in line with its values, has sourced a PC recycling company (by asking her son who works in IT for a local hospital); it takes computers and sends them on to third world countries.

Implications:

- | |
|--|
| <ul style="list-style-type: none">• When an unusual waste item occurs in a business, people can adopt domestic patterns of behaviour |
|--|

h) Electrical & electronic items

- **15% of SMEs generate electrical & electronic items of waste.**
- **There is again a significant sector difference here, with a high 23% of SMEs in the business services sector involved, compared to small proportions for the other 2 sectors:** only 8% for retail & wholesale and a mere 2% for hospitality SMEs. Clearly, the office focus of the business services sector means a far higher involvement with electrical & electronic items.
- However, volumes are small. It represents, for the average SME, only c4% of their monthly waste.
- Base numbers are small here, but it is clear that these items are mostly being separated out for recycling/special disposal. However, that still leaves 21% of SMEs who include them in their other general waste.

(Source: Tables 9, 14 and 36)

Indeed, the car dealer states that can be categorised as commercial waste and so is OK to include.

Indeed, the car dealer states that general waste can include light engineering, and so car electrics are simply thrown away by his service staff. However, other companies are aware of the new WEEE legislation which will govern this.

f) Furniture

- 11% of SMEs generate furniture waste.
- **There is again a significant sector difference here, with a relatively high 16% of SMEs in the business services sector involved, compared to small proportions for the other 2 sectors: 7% for retail & wholesale and only 3% for hospitality SMEs.** Clearly, the office focus of the business services sector means a far higher involvement with office furniture which needs updating/changing.
- Furniture is an infrequent waste item as SMEs are not keen to make unnecessary replacements, but it can be bulky. **It therefore represents, for the average SME in this study, 16% of their "monthly" waste.**

- **This average amount needs to be treated with caution, however, as there is a high average figure recorded for the retail & wholesale category of 42%, boosted by some high responses here (possibly because they are furniture retailers).**
- **Base numbers are small here, but it is clear that furniture is highly unlikely to be thrown away with their normal waste:** only 10% of SMEs include them in their general waste.
- **Instead, this waste is separated for specific disposal, and a high four in ten of these SMEs take it to their local tip – either for crushing or for recycling, with others also mentioning home recycling.**

(Source: Tables 9, 17 and 39)

Donating furniture directly to a charity or a community initiative is rarely mentioned in the telephone survey. In the depth interviews, differing approaches emerged, as these example shows:

- while the manager of the large upmarket hotel cites Marriott Hotels' practice of donating bedding and furniture to charity, no policy decision on this is needed in her hotel for a long while yet as it only newly set up
- another hotel simply puts what cannot be repaired into skips, without having thought of any other solutions
- the bathroom and kitchen retailer is occasionally asked to dispose of old kitchen units after an installation and they are taken to the Council dump for "recycling"
- the property developer, when clearing old properties, pays for his furniture to be disposed of at the Council's dump, paying according to the weight.

g) Other waste streams

Other types of waste affect only very small proportions of SMEs, with metal the highest at 6%.

Metal is the only material that crosses all three sectors. The other materials – oils, toxic chemicals, wood, tyres/rubber, clinical/medical waste and fabric – typically only crop up in the retail & wholesale sector, and in the odd SME in the business services sector, depending on the nature of their business. This means that average volumes of waste range from tiny amounts to considerable proportions. (Source: Tables 9, 25-27, and 47-49)

Implications:

- | |
|---|
| <ul style="list-style-type: none"> • It will be easier to target these SMEs by their special waste streams than by their broad industry sector or their location in London |
|---|

Only a few SMEs say they put their metal or toxic chemicals into the general waste, no doubt as volumes are small or the toxicity is low (e.g. cleaning chemicals). Instead, people are aware of their legal obligations regarding oils and toxic chemicals and separate them out for specific disposal, and a few SMEs take metal to the local tip.

In the depth interviews, small quantities of metal were collected, building up over time, to create enough volume, and then taken to a scrap metal merchant. Metal has intrinsic value as a material in its own right, and so SMEs put effort into separation, storage and then delivery. They may get a token amount back (eg beer money for the staff, in the case of the locksmith), or nothing at all (in the case of the bike shop). However, the bike shop owner was simply pleased to be making another positive step in reducing landfill.

The printer has very valuable metal to recycle, however – see on to section 2.2.8 on the costs of waste management.

3.2.7 Who Collects Their Waste

Among the depths around half have their waste collected by their local Council, while the others use commercial organisations (eg Onyx, Cleanaway), because their Council does not provide that service.

While Councils can collect different waste streams, commercial waste management companies specialise and so SMEs are often using more than one company. Those with very specialist waste streams have sourced expert help, e.g. Brent Oils for engine oil and brake fluids, and the kitchen and bathroom retailer/installer is just about to source an extra commercial firm because of the new WEEE directive relating to hobs, washing machines etc. The printer has numerous collectors, as follows: one to collect all the paper for recycling, Grundons for general waste, and specialist collector(s) for the waste chemicals and empty ink/paint pots organised through J&G Environmental, plus numerous other suppliers who collect back empty containers and metal when they make a delivery (see on to supplier pushback section 2.3.4).

However, the core service issue remains the same, no matter who collects: **SMEs want reliability of collection above all else, in order to avoid the many problems of waste piling up. They also want costs to be kept down.**

Council services for commercial waste are clearly very variable, but SMEs are not aware of this variation – they only know about where they live/how it works for their business. For example:

- the large hotel in central London has many full skips to be emptied at once:

"We have to be very careful with timings. The Council collects the waste each day at 4.15pm so we push it out ready so it's not there such a long time. We have to be aware of our neighbours - it's so densely packed in London, we have got offices and residential, and also it's our main entrance for guests as well so the first thing they see is the rubbish!"

- the boutique hotel in the same Borough would like to use the Council's recycling services but has been turned away:

"It's quite difficult because the Council, the way I understand it is, all their targets are geared towards household recycling and they do some commercial recycling, but not very much. We've tried to get onto their scheme many times and they always say they're full, which is quite frustrating, so to do recycling you have to do it through private companies and they charge a fortune. So we do pay a company to

take our paper and our glass away but everything else goes into mixed rubbish unfortunately. "

- a small restaurant in the Corporation of London district puts small Council rubbish bags and small stacks of cardboard (bound in the pre-paid Council sticker) out on the street for collection 2-4 times per day, during the day
- contrast the small restaurant in a London suburb where the Council does not collect, but recommended a commercial organisation. The restaurant puts rubbish out in the street in black plastic bags. The collection is meant to be daily, but the times are very variable and even occur in the middle of the night, or a collection can be missed out completely.

" The problem is you get the guys not collecting the waste - and it's a massive problem for a restaurant - you can't keep food lying around outside. It's having a mess in front of your restaurant - it stinks, it decomposes fast. "

The fact that their own Council does not collect commercial waste is typically accepted by SMEs as this has been the case for many years now. However, the bike shop owner who has been in touch with his Council about plastic recycling possibilities is clearly very irritated by this lack of involvement in tackling waste more broadly. As we shall see in the last two sections of this report, Councils are thought to have a significant role to play as regards providing information & advice and the facilities to help SMEs manage their waste sustainably – even if they will not provide a commercial collection service.

A key finding in the depths is that **even where local businesses shared a service yard or an industrial estate, there was no collective/community approach to waste disposal**. These SMEs have always taken a completely individual approach to waste management. They had never thought that a combined approach could yield possible savings for themselves, or lead to reduced material going to landfill (by combining all their small quantities of a particular waste stream together). Businesses do not have the time, or the inclination, to think and act collectively, even those next door to each other, even if they are the same type of business.

Implications:

- Community-based activity is not worth suggesting to SMEs

3.2.8 Cost of Waste Disposal

SMEs were asked to say how much they spend disposing of waste on a monthly basis. We know from the depth interviews that some SMEs had trouble providing information on this, or could only provide a very rough guess, because:

- they often simply did not know as it is included in their Council's business rates or landlord's service charge
- another person in the company deals with the bills
- and because they had never calculated the total cost across their various suppliers:
 - they only had a firm handle on their main supplier's charge
 - their supplier charges on a per bin/bag basis, so costs fluctuate.

Thus it was no surprise to find in the telephone interviews that 17% of business services and 18% of retailers claim they pay nothing (presumably as it is included in some other overall cost) and 13% of all SMEs say they do not know what their spend on waste disposal is. (source: Tables 56 & 57)

Overall, the average spent on waste disposal amounts to c£750 per month, ie £9000 per year. This figure needs to be viewed with some caution:

- given the context explained above
- as their answers will have included estimates as well as hard figures
- and **as the amounts vary considerably across the range of SMEs** interviewed, and so averages will be affected by the balance of business types included in this survey within each sector
 - **At the bottom end, 6% of businesses have given a very low estimate of up to £10 per month (ie a maximum of £120 for the year).**
 - **At the top end, 13% of businesses have given an estimate of over £1000 per month (ie at least £12,000 for the year).**
 - **SMEs in the hotels & restaurants sector have a substantial monthly average of c£2,300**
 - **compared to c£700 for business services SMEs, and c£400 for retailers.**

(Source: Table 56)

The frequency of collection needed by hotels & restaurants no doubt boosts costs here, whereas other SMEs can wait for a weekly collection.

In the depth interviews, among those who were able to comment on their outlay on waste management, we found a whole range of costs and pricing systems, and a whole range of attitudes towards this. For example:

- the headgear wholesaler pays £200 per year for the bin collection service included in his lease. As they recycle/reuse such a lot, he has only a household sized bag of general rubbish a week (company turnover of £350,000)
- the restaurant using the Corporation of London system pays in advance for bags at about £1 per bag, and for stickers to go round bundles of cardboard at £1 per strip. He guesses that they use about 500 bags per month (refused to answer turnover question)
- the car dealer (after asking a colleague) discovers to his amazement that they spend as much as £400-500 per month across the two main commercial collection companies, ie up to c£6000 per year (turnover of £7 million)

"I thought that was a hell of a lot - I don't know how that compares with other businesses our size."

- the bike shop pays about £4000 per year, paying £12 per bin now for general rubbish, and charged for cardboard on the basis of c20 flattened boxes per bin. He is greatly annoyed by the spiralling costs over the years and feels that collection companies are taking advantage of businesses who are trying to recycle. His turnover is c£1.2 m, but in terms of business profit he is

acutely sensitive to the burden this represents and how he could be using that money to invest in his staff and shop instead:

"£4000 - it's absolutely outrageous! It's only a small shop - that's 4% of my turnover (sic)."

- By contrast, the printer (also with a turnover of c£1m) pays an estimated £2000 per year, despite the various complex waste streams involved. This is because his paper is collected for free, given the volume involved, and the aluminium recovered is so valuable that he can be given as much as £500 back per bin.

Indeed, there is some comment from another couple of SMEs that large volume waste producers can negotiate much better deals, or even be paid for their waste, so emphasising the unfair burden on SMEs.

It therefore appears that waste management costs are not being carefully watched/managed – they are simply accepted as inevitable overheads especially as these SMEs do not see any further ways to minimise their waste, and/or have no control over Council collection charges. The bike shop owner is the only SME to have fully assessed his current waste costs, to have challenged his supplier on rising costs and changed to another supplier as a result.

Implications:

- | |
|---|
| <ul style="list-style-type: none">• The cost of waste management can be a significant overhead or a mere trifle for some SMEs, so cost saving arguments will not be a universal motivator• Their lack of cost awareness regarding waste disposal and their (perceived) inability to control costs by waste minimisation also reduces the impact of cost saving arguments |
|---|

"I quite understand it makes sense. The amount of money and investment they will save by recycling is a good deal, I quite understand, but you have to be a big corporation."

(Property developer, 1-10 staff, South London)

3.3 SUSTAINABLE WASTE MANAGEMENT ACTIVITY

3.3.1 Current Levels of Sustainable Waste Management Activity

Having been through all the waste streams individually in order to remind SMEs of all their waste issues, we then asked SMEs to summarise their waste management approach. We read out a list of 6 levels of waste management activity and they then chose the one that comes closest to their business's approach.

Overall, three-quarters of SMEs feel that they are active recyclers and/or minimisers of business waste. Indeed, a substantial four in ten SMEs state confidently that they have done as much as possible.

The fact that these core waste activists are to be found equally across all three sectors, and that so many additional SMEs state that have been recycling for years or have recently begun recycling, shows that responsible approaches to waste management are widespread.

Active sustainable waste managers: 77% overall

37% have already acted to reduce waste as much as possible, by reusing, recycling, and generally minimising waste coming into and out of the business

24% have been doing some recycling or minimising waste for years

17% have recently begun recycling or minimising waste

This means, however, that one in five SMEs in London admit they are not tackling their waste sustainably.

Inactive on waste: 20% overall

- 11% have thought about recycling or minimising waste but found various problems in actually doing it
- 6% have thought about recycling or minimising waste but not done anything
- 3% have not thought about any change in our waste management approach

(Source: Table 53)

Even among the inactives therefore some attention has been given to the issue of recycling or minimising waste, with 11% actually having looked into the feasibility (the actual degree of research involved may have been minimal or substantial).

It is SMEs in the hotels & restaurants sector who are most likely to be inactive: a significant 34%. This compares to 22% of retailers & wholesalers and 16% who are inactive in the business services sector. In the hospitality sector there is a clear core who have done as much as possible – identical in size (36%) to the business services and retail & wholesale sectors, but then they are less likely to be recycling, hence a longer tail of those who are not active in this sector.

Sector type is the **only** major differentiator here as regards levels of sustainable waste management activity - **there is no statistically significant difference by size of company, age of company, organisational structure, or location in London**. This is also the case for those operating in the green sector – they appear somewhat more likely to be active, but this result is not actually statistically significant.

The only other clear difference is that those who said earlier that they took an ad hoc approach to waste disposal (i.e. no embedded processes or written policy) are – as would be expected – more likely to be inactive (39%). However, this still means that the majority of this group (61%) are in fact acting sustainably.

In the depth interviews a similar spectrum of waste management activity was found, ranging from those SMEs who had barely given this topic any thought through to those who, over the years, have recycled and minimised more and more, so that there was really very little else to be tackled.

Implications:
<ul style="list-style-type: none">• This significant degree of sustainable waste activity across all types of London SMEs needs to be publicly recognised and applauded to create a stronger sense of business cohesion/commitment to tackle waste<ul style="list-style-type: none">○ To encourage the inactive to start○ To encourage those who are already making an effort with their waste to keep on and to include other waste streams

3.3.2 Driving Factors for the Actives

When asked to explain why they manage their waste in this way, the actives' main reasons focus on their concern for the environment, wanting to act responsibly, and hence doing their bit, **as they do at home**. **This quantitative survey result thus confirms the strong business ethic found in the qualitative interviews, and the lack of staff or customer pressure or strategic business considerations.**

"Just to be careful with what we are using and throwing away. For example, with the printer paper we use it twice instead of once - we use the other side. Maybe because I start to do the waste at home, I teach my kids to look after the environment. Everyone needs to do something."
(Photographer, 1-10 staff, South London)

Reasons for current approach to waste: the actives' spontaneous answers

I want to protect the environment/look after the planet	47%
I want to be a responsible business	33%
We all need to do our bit	19%
It doesn't cost money – just time/effort	9%
The cost – it is cheaper/cheap	2%
Recycling at home has meant I've started to do it at work	5%
It's the law regarding that type of waste	5%
The staff want to do it/are active on issues like this	5%
We are a green business/run ethically	3%
It's convenient/easy	2%
The Council collects it	2%
My customers expect it of us	1%
My landlord obliges us to do it	1%

(Source: Table 55) Base = those who are currently active in minimising or recycling waste (unweighted base = 236 SMEs)

These reasons are typically found among all three sectors and across all types of business, but it is worth noting that a very high proportion of retailers & wholesalers cite protecting the environment as a key driver (62%). They are no doubt particularly conscious of the packaging their business uses, and in section 2.3.4 we discuss supplier pushback.

Some highlight cost neutrality as a reason for their sustainable waste activity, i.e. there is no extra cost/outlay involved – purely extra time and effort. This emerged in the depth interviews as something the actives are happily prepared to do – they do not factor in staff time as part of the overall cost of waste; they simply focus on actual costs the business has to pay out. A few even declare in the telephone survey that it is possible to find actual cost benefits for their business in managing/minimising their waste.

It is worth noting the interplay of all these factors; in the depth interviews the rationale for separating and recycling cardboard covers a whole range of reasons, and the environmental recycling one is not necessarily uppermost. Cardboard is bulky and it is more practical to flatten and separate it and so have less general waste disposal to pay for. The fact that it is also a business norm, with Council and commercial waste collection services readily available, means that there is a simple acceptance of this way of behaving.

The **law/regulations** also act as a powerful driver to action, which is then embedded as the normal (unthinking) routine - albeit that most SMEs are not dealing with specialist materials. The printer, as an environmentally concerned person, has moved his company to act ahead of legislation, and he has also been helped by changing technology, for example moving to water-based paints which are much more environmentally friendly than oil-based ones.

While the printer has frequent chemicals collections, the photographer simply owns a special filter which is changed once a year to separate out all the toxic

chemicals/metals. The filter supplier then extracts any precious metals for re-use. She did not count this as an example of her sustainable waste management activity – indeed, she needed prompting on this waste stream; it was simply what she had to do.

"We handle stuff that could be more damaging. If I was a shop I don't know whether I'd be as concerned - well, I'd be as concerned but I don't know whether I'd be pushed so quickly (to act)."
(Printer, 11-24 staff, West London)

What the quantitative survey results cannot convey is the degree of **environmental activism/personal passion and commitment** that can be a driver to action here. The bike shop owner is an obvious example – without any help or advice from the Council or his commercial waste collectors, he has found sustainable solutions to disposing of his rubber tyres and metal bike parts. By chance, he came across a local scrap metal dealer 2 weeks ago and has arranged to drop in the odd collection of metal, and he asked his local tyre dealer whether he could drop in the odd collection of bike tyres. The tyre company actually charges him to do this (£1.25 per 25 tyres) but he is prepared to pay, for the sake of the environment and because the tyres are used in children's playgrounds etc.

"I just felt it was a waste of materials – the metal could be used for something else. It's just wasted in landfill. Somebody's spent a lot of money producing that item and there's no reason why it can't be re-used or melted down and used for something different. That in itself will then stop global warming."

Implications:
Appealing to owners/managers simply to avoid wasting materials, to be environmentally responsible, is a powerful motivator in its own right Addressing SME concerns about operational efficiency and cost neutrality will show that the GLA understand the SME viewpoint

3.3.2 Perceived Barriers for the Inactives

When asked to explain why they are not actively managing their waste, some clear barriers emerge: notably the lack of recycling facilities available to businesses, plus the (perceived) cost involved.

Reasons for current approach to waste: the inactives' spontaneous answers

No recycling facilities run by Council for businesses	42%
Will cost us money	20%
No space to store waste	10%
No time to look into this	8%
No time to separate waste each week	4%
Small company/not enough waste	4%
Never thought about this before	2%
Don't know why	18%

(Source: Table 54) Base = those who are not currently active in minimising or recycling waste (unweighted base = 87 SMEs)

Other barriers are a lack of space and a lack of time. The emphasis is thus very much on practical issues which prevent them, and this was echoed in the qualitative interviews. "Space" is not only storage space but the whole layout of the premises and how it connects to the outside area for waste collection.

As a classic example, the restaurant based in the City of London separates out its cardboard, but not its glass, despite the Corporation providing a glass recycling service. This is because the restaurant has no loading bay and all wine bottles are stored in the basement which can only be accessed via a narrow and steep set of stairs. Wine boxes can easily be carried down and up, but the Corporation's glass recycle bins are too large, and would be too heavy to carry once filled with empty bottles.

In any case, as their waste is collected 2-4 times per day the amount of glass being thrown away has not registered as a particular issue or concern to the manager. He is concerned, however, that the other local bars nearby throw quantities of beer bottles away without recycling those.

Indeed, a key factor is simply the small volumes of waste material generated overall or in each category.

"They all want you to keep rubbish on site - because we don't produce huge amounts of rubbish compared to most of their clients I guess - and we don't have much storage space here and we can't keep huge amounts of rubbish around. They'd have a minimum of 10-15 bags of rubbish as they're catering for huge office blocks, where we'd have 1-2 bags a week, so it's quite difficult to even join a scheme because we'll never have enough for them to take it away. So things like that have been a hindrance. We did find a company you can phone as and when; we generally get them to come once a week because we don't want to keep stuff all the time, but we can phone them and say, 'We've got stuff today' and they will generally come within 24 hours and get it."

(Hotel, 50+ staff working across two hotels, central London)

It is significant that many inactive SMEs don't really know why they are not more active (18%) – evidently they have not thought about the issue/realised that they could be active waste managers. For example, one hotel manager interviewed in-depth has been in his post for three years and has still not found the time to look into waste management, despite thinking that he would when he first arrived.

One barrier that is notable for its **absence** is a lack of knowledge of what to do – only a few inactive SMEs complained about not knowing who to use to collect their waste or what to do about their waste. Instead, the problem clearly lies at a higher level – they need to be given the spur to think about waste first. (See on to the next main section advice & support) This is also true of the actives: in the depth interviews it was clear that some who are active had remained stuck at a certain level of recycling activity – they had simply not thought to consider other waste streams.

Later on in section 2.5.2 we return to the issue of barriers with a question asked of **all** SMEs (not just of the inactives) about any possible barriers for their waste management activity for the year ahead.

3.3.4 More Sophisticated Approaches – Currently Practised or Would Consider

A list of 10 possible ways of approaching waste management in a more sustainable way was read out to all SMEs. The list was read in a fixed order as the possibilities went from quite simple practices, such as recycling packaging, through to quite advanced concepts, such as waste exchanges, ship to point of use and extended producer responsibility.

These were all briefly explained to SMES, but we would caution that their answers here are obviously very much top of mind, without full consideration of the issues involved, and some will not be applicable as it all depends on the nature of their business. (For example, business services are unlikely to use packaging themselves, and re-using scrap material is unlikely in the hotels & restaurants sector.)

The full data set has more detailed analysis, but it is helpful to summarise the main responses here, based on all SMEs, as this provides useful top line indications of:

- a) the degree of sophistication currently in London SMEs' waste management practices
- b) and the levels of instant willingness to reconsider their current waste management approach.

Currently, we find that only three of these have been done already by around half of these SMEs: recycling packaging, optimising the resources they use, and re-using scrap material in their business. They are also the ones other SMEs are likely to consider implementing, and so continue to head the overall list.

Other popular activities with appeal to a sizeable proportion of SMEs all minimise waste: improving quality control and process monitoring, specifying minimum packaging to suppliers and reducing packaging on their own goods, and implementing a paperless office.

More Sophisticated Approaches – Currently Practised or Would Consider: Prompted

	Currently do	Would consider	Either currently do or would consider (combined answers)
Unweighted base = All SMEs (330)			
	%	%	%
1) Recycling of packaging/items	53	29	82
2) Implementing a paperless office	27	19	45
3) Reducing packaging on the goods you supply	22	15	37
4) Specifying to your suppliers the need for minimum packaging	22	24	46
5) Improving quality control and process monitoring in order to minimise waste generated by your business	35	23	58
6) Resource optimisation - getting the most out of your resources	52	18	70
7) Reusing scrap material in your business	50	12	62
8) Waste exchanges - where the waste product of one process becomes the raw material for a second process	14	15	29
9) Ship to point of use – making deliveries of incoming raw materials or components direct to the point where they are used can minimise handling and the use of protective wrappings	6	11	18
10) Extended Producer Responsibility – including the environmental costs associated with products throughout their life cycles into the market price of the product	5	11	16

(Source: Tables 60 - 64)

It is significant that the overall answers are remarkably similar for both those who are already acting sustainably and the inactives. This shows the willingness of the inactives to consider acting differently and the willingness of the actives to add on extra practices.

Implications:
<ul style="list-style-type: none"> A powerful way in to encourage better waste management practice may be via business process improvement, so boosting SMEs' efficiency and their bottom line at the same time

-
- There is potential to keep on moving London SMEs up through levels of waste management activity, from basic recycling through to sophisticated approaches affecting the way they operate as a business

In the depth interviews, we probed on supplier and customer pressures on them. There was scant mention of this: in other words, **those who are active are doing their bit, primarily to be responsible and not for business gain as a result of customer or supplier pressure.**

Customers:

None of the SMEs could recall any enquiries from customers about their waste management activity. Instead, there is a sense among the active SMEs that - if they are ever asked - they will be able to give a positive response, rather than being caught out. For example, a couple of the upmarket hotels are very conscious of their customer bases (e.g. the media) and so they are concerned to be in tune with any current/emerging trends, and the charity wishes to act in a caring way on every front.

"Our Commercial Director has been one of the most vocal about it. She's more aware because she's out there in the marketplace and is out there selling us and she's the one who has been pushing it a bit more and that's probably why we've been focusing on it a bit more. We aren't perfect and we have so far to go when it comes to this sort of thing, but we are trying to get on board with it. I think there are a few websites that we work with closely that cater for high-end travel which are the kind of customers we try to get, and the more money people have and the more educated they are the more inclined they are to be more environmentally aware, so it's something we definitely need to look at."

(Hotel, 50+ staff working across two hotels, central London – just started looking at policy)

The printer, however, is an interesting example of how customer pressure can work. To date, he has only ever been asked if he could use recycled paper, with no further enquiries into his printing processes from his commercial clients. However, he is now thinking of trying to tender for public sector printing business and he has noted that they are concerned about his processes. It therefore now emerges that this is another factor in his beginning to write his waste policy.

In fact, the opposite is happening - customers **actually place a burden of waste onto these SMEs**, e.g. the locksmith takes away waste at the end of the installation, the kitchen & bathroom retailer says customers want him to take away the cardboard and (occasionally) the old kitchen on installation, and the hotels have quite a large amount of waste left behind in the bedrooms. This, they all feel, is just part of being in business and they have to deal with it, as part of customer service.

"At the moment I have to say I would put my hands up and say we are not the best. As a hotel most of our waste comes from our guests and we have no control over that and you'd be surprised at the amount of rubbish left behind by people in their bedrooms, but what we try to do is - we've only started recently - separate it out as much as possible because it's not the nicest task to ask anybody to do, so we just try to take out any paper, any glass and keep them separate and try to recycle those. We just have two bins, a paper bin and a glass bin and then they bring the rubbish

down from the bedrooms and they just chuck it into each bin and then they get sent off. We get lots of people who leave clothes behind, things like that and we have to keep it for 3 months; if people don't claim it we give it to a charity shop if we think it's worth something, if not I guess we'd just chuck it away. "
(Hotel, 50-250 staff, central London)

The bike shop, however, has recently started to charge customers for disposing of their waste after a bike service, an extra £1 on top of the £40 service fee. He makes this explicit to educate customers about the variety of waste generated in a service: packaging, oil, metal, rubber. His customers do not like it, but they accept it. He says he is also doing this to try to counteract his high waste costs, but he has not extended the principle to charging for the cardboard the bike comes in when he makes a bike sale. (They also take a stand on plastic bags, and rarely give them out.)

"It is a little bit easier in this industry (i.e. cycling) to dictate to customers and say we are trying to help the environment by doing small things which make a big difference in the long term. "

Suppliers:

None of the SMEs cited any pressure from others higher up in the supply chain on them. Even the car dealer who sells upmarket European cars from one major car manufacturer has had no guidance whatsoever, even though they are producing a hybrid fuel car:

" I suppose X, as a manufacturer, doesn't actually see that as being their responsibility - it's the individual's responsibility to act responsibly."

However, one hotel can see that there is a new trend for tour agents to create a new category of eco holidays, with only "green" hotels allowed to participate, and this could be a potential motivator to him, in future.

"It's never happened to us yet- no one has yet said, 'What is your environmental policy?,' but some third-party people that we work with, internet/web booking sites, things like that, some of them are now introducing green ratings for hotels that they market, and there is one particular one that is really pushing it. So it is something that we are aware of - to keep up with the marketplace."
(Hotel, 50-250 staff, central London)

Many of these SMEs have simply never thought of putting pressure back onto their own suppliers, either to minimise packaging or to take back their waste. It is considered their own waste now and they are responsible for its disposal. Typically, SMEs accept the status quo, without challenging the way the world works around them – so in the hospitality sector, it is perfectly normal for cooking oil suppliers to take back the used oil, but it is not the norm for wine merchants or beer suppliers.

"We've never actually gone to them and said 'minimise' and I think we probably could, because sometimes you order something like a stapler and it will come in a huge box and you think, 'What's the point of that?'"
(Hotel, 50+ staff working in two hotels, central London)

When they begin to think it through, there are also a number of difficulties they can envisage due to storage, let alone whether the supplier is geared up to take it back or even prepared to listen to their views.

"We don't do any of that - it just comes in as it comes in. We're not big enough to dictate to them what to do because we're ordering not very big amounts."
(Headgear wholesaler, 11-24 staff, South London)

On the issue of **packaging**, there are mixed views in evidence. Retailers can be unhappy with the amount of plastic and cardboard used, not simply because of the effort, expense and environmental impact, but also because it uses up valuable display space in their shops. The bike shop has repeatedly protested, but no change is expected as the manufacturers are mainly concerned about maximising the impact of their product in the shop and about protecting their products from damage. This is a key point for other retailers – they want plenty of packaging to avoid complaints about damaged products:

"We have tried to deal with suppliers: 'Please make an item with recyclable packaging and please make it smaller'."
(Bike shop, 1-10 staff, South London)

"We always have this issue with them as regards damaged parts so they are packing them in as much cardboard and polystyrene as they can because they are shipped and then transported."
(Car dealer, 25-49 staff, North London)

However, a few SMEs have been successful in making suppliers take back or reduce their packaging.

- The printer, through sheer dogged persistence, has convinced the oil supplier (a major oil company) to take back their empty oil barrels.

"The worst people are the oil companies. They seem very reluctant to collect the oil drums - I just keep on and on, 6-8 weeks of ringing. It seems such a waste - there's a lot of work goes into making an oil drum."

- The photographer now has albums which are only boxed once, rather than individually boxed. This change was made especially for her, and she is also charged less as using less packaging. She does need to take more care over their storage/handling, but she is pleased at the reduction in waste. However, she has not managed to persuade the film supplier to return to putting film in boxes together, rather than individual plastic containers
- The Indian restaurant hands back the plastic food containers to suppliers – unasked, and they do take them back, but he does not know if they are re-used or thrown away.

Idea:

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| <ul style="list-style-type: none">• Pressure applied along the supply chain, in either direction, could be fostered by the GLA to create a chain reaction so influencing more businesses and individuals to act sustainably in a collective way |
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3.4 ADVICE AND SUPPORT STRUCTURE

3.4.1 General Business Advisors

a) Usage

A high two-thirds of SMEs (64%) declare that they do not use any organisations for business advice and information in general **(despite the reminder to think back over organisations and bodies they have used in the past)**. **Retail & wholesale SMEs are the most independent (70%), while hotels & restaurants are the least, by comparison, but still with only 50% having sought general business advice.**

Local Councils are the most common source of advice cited (22%), a long way ahead of any other type of advisor. By comparison, only 6% cite their trade association or a general business body such as the CBI, 4% specify Business in the Community, and 3% their accountant. Central Government or London-wide bodies are rarely mentioned here. (Source: Table 65) Again, SMEs in the hospitality sector stand out - a high 44% mention the Council as a source of advice, no doubt due to the many licensing regulations etc affecting their business.

NB SMEs' answers here relating to general business advice may have been a little skewed by the focus on waste in the interview, but this general self-sufficiency/lack of advisors was in fact confirmed in the depth interviews too.

In the depth interviews, it emerged that while some are members of trade bodies, views of their actual usefulness vary widely.

b) Usage for Waste Advice

Among the third who say they use some form of general business advisor, **only a third have actually sought advice or support from them on the topic of waste management.** (Source: Table 75)

Amongst those who have not sought waste advice, **around half say they would turn to their general business advisors for advice on waste management.** (Source: Tables 77)

In the depth interviews, the few who are members of active trade bodies see them as co-ordinators of information/guidelines (e.g. on WEEE) and as campaigners (e.g. on superfluous packaging), but they would still expect their Local Authority to be the source for specific local advice on issues of general waste

3.4.2 Other Sources of Waste Management Advice Used

In total, 12% of SMEs have talked to *other* advisors about waste management (i.e. not their general business advisors). (Source: Table 80) Once again, Councils have been their first port of call, with only a few mentions of other organisations, principally commercial waste management organisations (e.g. Veolia, Biffa, and Paper Round) and the Environment Agency. (Source: Table 81)

In the depth interviews, environmental advisers and commercial waste organisations are seen as specialists and so they too can play a part.

"It just gives it more clout when it does come from a company that's well-known for working in that area. It's just nice to receive information, the way it's personalised, 'We know that your company, these are the pros and the cons, and this is what you could be doing now and this is what we've just discovered.' To be updated on what's going on out there in terms of waste."

(Hotel, 50-250 staff, central London)

One of the boutique hotels can also envisage this falling into the remit of his health & safety consultants.

However, it is the Councils (or regional or national layers of government) who are instinctively seen to have the most credibility as advisers on waste management. They are the obvious first port of call, both as the local waste organiser and as the local body in touch with businesses in its area.

"That's my natural instinct - they are the Local Authority and I suppose they have got to be responsible for the local environment."

(Car dealer, 25-49 staff, North London)

"If you did it by sector, you'd need to identify the sector and approach separately - but as everybody has to pay the business rates the Council is the key body... It should be the Council - they do the business rate, they know what you are doing and the size of the company. With the Council, nobody can say 'no'! You are listening."

(Photographer, 1-10 staff, South London)

This is the other key reason about the Council/Government bodies - their official status means that businesses will take notice:

"People listen to their own local Council rather than some bigwig - it's all chit chat and nothing gets done. If it's coming from the local Borough, and you have to pay your local tax, then you're likely to listen."

(Bike shop, 1-10 staff, South London)

"If you got something from the Environment Agency you'd sit up and take notice - anything with an official looking stamp. It would carry more clout initially."

(Printer, 11-24 staff, West London)

Implications:

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| <ul style="list-style-type: none">• Given the diversity of the general business advisor base, and the degree of self-reliance of SMEs once they are established, the GLA's efforts would be better focused targeting the most active/best respected trade associations where there is actually an urgent waste issue to address• From the SME viewpoint local Councils are the most obvious credible channel for information and advice (see on) |
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3.4.3 Overall SME Waste Advice Sought

Overall therefore, combining answers across these various questions, the great majority of SMEs have not sought any waste advice at all (77%). (Source: Table 78)

This holds true across all three sectors, with no statistically significant differences. However, it is those in the hospitality sector who appear most open to seeking advice, or saying they would consider seeking advice on waste.

Size of company is the key discriminator here: it is the largest SMEs with 50-250 staff who are most likely to have sought advice on waste (a high 46%), followed by a high 32% of those with 10-49 staff. However, only 18% of those with under 10 staff have sought advice on waste. Those operating in the green sector are also far more likely to have sought advice (41%).

However, the end result of this information & advice to date is unclear – there was no time in the telephone study to probe further on whether the information they received was helpful or not. The survey results show that those who are inactive on waste management are just as likely to have sought advice as those who are active.

3.4.3 Reasons Why Not Sought Waste Advice

In the telephone interviews a follow-up question was asked of some of these non-users. The prime reason why they have not sought advice is simply that they have not felt the need for it - their processes run smoothly, they do not produce much waste anyway, the Council or their waste collector deal with it (providing the service/any advice as required), and they can find information without turning to a specific advisor. (Source: Table 82)

In the depth interviews, this same pattern of self-organisation emerges – these SMEs have sorted out their waste practices over time, often without any advice whatsoever (unless it falls within regulations). Their waste collector (whether Council or commercial) has typically not been active in giving out information or advertising other services on offer.

The general assumption seems to be that their waste collector will be the one to prompt them if anything changes, so they can carry on with their waste approach. **This absence of communication about the importance of commercial waste, about the need to rethink waste practices, boosts the feeling that their waste routines are correct, and that there is no need to seek information or change.**

"Yes, until the situation is highlighted you don't realise you do need this help and advice. Is it something that Cleanaway should be doing, knowing our business, knowing what they collect? That is their business, they are in the front line."
(Car dealer, 25-49 staff, North London)

Implications:

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| <ul style="list-style-type: none">• The silence of Councils/Government and of commercial waste collectors on more sustainable waste management practice means that SMES continue in their ways, feeling that they what they are doing is enough/right |
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3.4.5 Awareness of Waste Management Advice and Support Organisations

Overall, only a fifth of SMEs say they are aware of any other organisations or bodies that provide advice and support on waste management (21%). (Source: Table 83)

However, even this low level of general awareness is overstated as their actual spontaneous answers tend to be rather thin and vague, with plenty of don't knows and mentions of Councils once again. A few specialist names do emerge at last, but only cited by tiny handfuls of SMEs: their local Waste Authority, WRAP, London First, the Environment Agency, and Envirowise. (Source: Table 84)

We then prompted SMEs with a list of names, and their combined spontaneous and prompted awareness results are shown below. SMEs' awareness of the range of support organisations available to them is decidedly patchy, and the emphasis is firmly on government bodies rather than specific waste bodies.

Awareness of Waste Management Advice and Support Organisations (combined spontaneous and prompted)

Local Councils	92%
Environment Agency	66%
Local Waste Authority	60%
Carbon Trust	32%
London First	25%
Chartered Institute of Waste Management	17%
Waste Watch	15%
Business in the Environment	14%
Veolia Environmental Services	10%
Envirowise	9%
London Remade	4%
WRAP	3%
Netregs	3%

(Source: Table 85)

Base = All SMEs (330)

Again these answers need to be viewed with caution - from the depths we found that even when SMEs say they are "aware" of these organisations, it is typically at a very low and vague level – simply heard of the name, but know very little about what they do. For example, The Carbon Trust, despite its high profile advertising campaign and the topicality of carbon footprints, was also little known in the depths.

3.4.6 Preferred Methods of Contact

When SMEs make contact themselves with their advisers, their preferred method is mainly telephone (69%), followed by email (24%). Only a tiny few mention letters or websites. When dealing with their Council, the phone

dominates even more (78%). (Source: Tables 66-67) However, this is because they already have a relationship and are seeking specific advice/guidance.

When SMEs are simply in receiving mode, learning about the existence of organisations then a whole a variety of media/channels come into play.

Some of those who are aware of various advisory organisations on waste were asked in the telephone survey how they found out about them. A whole range of sources are mentioned, as follows:

- advertising and media coverage (TV, radio, press etc) play their part in raising awareness and generally getting the name known
- direct activity by the organisations themselves with representatives making contact with these businesses or sending mail shots/Council newsletters
- or online activity by SMEs: general web searching or following a link from their Council's website. (Source: Table 86)

Implications:

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| <ul style="list-style-type: none">• Businesses need to be marketed to directly in order to generate awareness and activity as relatively few are in active "seeking" mode• All channels need to be deployed so that "opportunities to see" among SMEs are greatly increased in order to boost the likelihood of moving this issue of waste management up the SME agenda and onto taking advice & action |
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In the depth interviews, various other ideas emerged about how the waste management message could be communicated to businesses, adopting a sequential approach. What they ask for first is printed material sent to them to alert them/give them basic starter information. The internet then becomes an obvious information source, once companies have been prompted to make an active search. Their instinct is often to Google the topic, though some say they would head straight to their Council's website first – or simply ring them up.

Ideas for marketing:
<ul style="list-style-type: none">• Include a mailshot with the business rates/any other mass mailing from the Council• Include a mailshot with waste transfer registration forms• The mailshot could be a booklet/information pack, or a letter/leaflet promoting the core message, with the relevant website highlighted for further detail, and phone numbers to call• Commercial waste organisations could do waste management audits/advice• Promote business recycling messages on the collection vans and the bins themselves

"It's got to be made simple, clear-cut and as short as possible - don't get bogged down in paperwork Nobody has time to read through 30-40 pages."

"Be much more proactive - push it every day: on TV, on buses, bus stops, in cabs, numbers to phone to deal with different products. "

3.4.7 Response to Portal

A portal which can pull the information together is naturally welcome to SMEs in the depth interviews, with the following design provisos:

- a clear, simple design
- links to other websites which are well signposted/described so that people do not waste time on unsuitable organisations or lose their way among layers of websites (web searching can "soak up time", and time is precious for SME owners/managers)
- however, the links on the portal must lead to organisations which are ready to be contacted by SMEs in a variety of ways
- any website has to be well designed so that it performs well on Google and so features high up the rankings, as their first thought is to simply Google the topic of waste rather than to seek out a specific website.

Implications:

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| <ul style="list-style-type: none">• Links on the portal need to function well in order not to deter any SMEs or waste their all-too precious time – the links need to be up-to date, well signposted, and lead to an organisation set up to receive SME contact in a variety of modes |
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SMEs are interested to find out basic information and advice on what to do with their waste, and a supplier directory or waste management contacts would also be handy.

In the telephone survey those had sought advice were primarily seeking basic information and advice on what to do with their waste, with only a quarter seeking waste management contacts/a suppliers directory. (Source : Table 76) Even in the depths, where there was more time to explore this issue, and to think about the ideal service they could be offered, we still find that SMEs' needs are very modest, and basic. They too focus simply on the basic practicalities of what to do with their waste, how to get rid of their small volumes frequently, and as individual businesses are so varied, the portal would obviously have to cover both core waste and specialist waste, in order to help every SME.

"The current rules and regulations, what you can do to help, where you can go to, how you can get rid of the stuff - as much information as you can get ."
(Printer, West London)

"Recycling can be challenging, because how do I recycle a helmet? I haven't come up with that one, because of the nature of the product. Cars can be stripped out and the metal re-used, but a helmet is a different issue."
(Headgear wholesaler/assembler)

Indeed, they often found it hard to think about what this advice/information might entail as they simply do not know what issues are out there – they are looking to be led/guided:

"It's for them to analyse where is all the waste coming from, what are the toxic wastes, what do we need to tackle first? What are the issues that urgently need to

be tackled now? Who are the producers of those waste problems and what can we do to help?

(Car dealer)

"I don't need advice, but if Enfield turned round and said, 'We can do this and this for you', we'd certainly look into it"

(Locksmith)

The portal's **supplier directory** will need to be carefully designed and managed to ensure that the information is relevant to their local area, listing about both collection services and central waste dumps/recycling facilities. Ideally, SMEs would like listings of approved companies, frequencies of collection services, their costs and the types of waste they collect. However, it is recognised that this could become complex and onerous to administer.

"I would just like to know what services they provide because they don't all provide the same service, they don't all recycle all types of material, and things like their schedule of pick-ups - how often would they be in my neighborhood to pick stuff up? That would be a quite influential thing for us - we don't want to keep stuff on site for a week or two."

(Hotel, 50+ staff working across two hotels, central London)

"It is going to be hard (i.e. having so much on the website) but eventually that would be awesome. If you could go on the internet, go to suppliers because you're conscious about the environment and you want to know if they are too and you can then make a decision about whether you want to go with them or not, whether you want to change or not, that would be great."

(Hotel, 50-250 staff, central London)

The fundamental point for SMEs is time and cost minimisation, and the portal's directory must enable them to find easy solutions:

"We need the information to enable us to clear our waste in the cheapest and most efficient way."

(Kitchen & bathroom retailer, 11-24 staff, South London)

3.5 CHANGING SME WASTE MANAGEMENT BEHAVIOUR IN LONDON

3.5.1 Waste Management Approach in Year Ahead

Towards the end of the interview, having covered a lot of ground on the topic of waste management, we asked SMEs about their intentions regarding waste management for the coming year.

Half of these SMEs say they will be more waste aware or active (48%), as just under one in ten SMEs (8%) declare that they will “definitely change some of our waste management practices”, and a further substantial 40% of companies say that they will now “consider looking at possible ways to further minimise or recycle” their waste in the year ahead. (Source: Table 92)

NB This is despite the fact that we had just asked them about any barriers they could see to increasing their waste management activity – in other words, this is a considered view and not a glibly optimistic answer.

Those who claim they **will definitely act** are far more likely to be:

- in the hotels & restaurants sector (a significantly high 21%, compared to 7% of business services SMEs and 5% of retailers). As we have seen throughout this report, they are the sector currently doing less with their waste
- and the larger SMEs, with 50+ employees (17%).

The definite actives are then to be found right across the board, i.e. including those with and without a waste policy, those in the green sector and those not, those who at the outset said they were already doing as much as they could to reduce and recycle their waste and those who are currently doing very little.

Implications:

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| <ul style="list-style-type: none">• This shows the impact that simply getting SMEs to think afresh about waste management can have (even for a very short time) - many SMEs appear receptive and ready to reconsider processes, and to make changes |
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Those who say they are **not going to change** their waste management approach in the year ahead are far more likely to be:

- Those who have been recycling for some years now (64%) as opposed to recent recyclers (30%), presumably as the former have worked through all their waste streams and are doing as much as they can
- Those with embedded processes as opposed to those who have a loose, ad hoc approach (58% vs 35%)
- Those operating outside the green sector (56%).

Implications:

- **Not all SMEs need to make changes as they are doing all the right things already, or they simply cannot make any further changes: the GLA needs to recognise that natural stopping points exist, or that substantive step changes in behaviour are not required for some businesses.**

3.5.2 Perceived Barriers to Increasing Waste Management Activity

Towards the end of the interview all SMEs were asked to identify – without any prompting – what they see to be the three main barriers to increasing waste management activity in their company. Their answers have then been combined into a total summary. Overall, a significant proportion (around four in ten) cannot immediately think of any barriers – as we found back in section 2.3.3 this is often because they have simply not thought about the issue. However, the hospitality sector SMEs are far more likely to give an answer here.

Those barriers that were identified are very practical – it is all about lacking the facilities/equipment/ability to act, coupled with the actual and *perceived* costs of doing more waste management, and an honest admission that they do not have the time/energy to do this.

Once again, lack of information about how to handle waste is not a frequently mentioned issue (only 6% spontaneously mention this).

The main barriers cited spontaneously are as follows:

Facilities:

- | | |
|---|-----|
| • Lack of recycling facilities (nearby) | 18% |
| • Lack of space to store waste for recycling/collection | 7% |
| • Council restrictions | 5% |
| • Supplier restrictions | 3% |
| • Poor waste management infrastructure | 2% |
| • Lack of/infrequent recycling collections | 2% |

"When you ask Richmond Council why?, they don't give you an excuse, they say 'We don't do it, that's all there is to it, thank you, goodbye'. I find that attitude a bit... well, they're not encouraging the human race to recycle at all."
(Bike shop)

"There's nowhere in Enfield that says, 'We are a recycling centre, come down to us.' So you can't recycle even if you wanted to."
(Locksmith)

"The biggest issue for us is it's just too difficult, because we can't just have a wheelie bin that we wheel outside because all of our staff areas are downstairs and everything has to be carried up. So the nature of the building stops us doing more than we could. But if it was free, then maybe we'd have put more effort into it; cost sometimes can be an issue."
(Hotel)

The costs involved:

- Actual cost of recycling/waste management 11%
- Perceived cost of recycling/waste management 8%
- Local Authorities charge to collect business waste 3%
- Cost of waste management outweighs cost to environment 1%
- Congestion charge incurred to travel to recycling facilities 1%

"If it meant we were helping the environment, (even if) it wasn't going to benefit us at all, but it wasn't going to COST us anything, then I wouldn't mind doing it. But if it was going to cost me money to do then I'd have to look at the odds."
(Locksmith)

"I guess the cons are expense - it's more expensive. I think that's one of the reasons why, for years, we never got around to doing it because it is more expensive to pay to recycle than it is to just chuck it all away in the general rubbish."
(Hotel)

Time:

- Lack of time to devote to waste management/more important things to worry about 14%
- Inertia/laziness/getting people to agree to do it 5%

"Pressure of business, I suppose - there are so many things to be thinking about, you don't really get the time to sit down and think about these things. Your mind and your day gets taken up with other things."
(Car dealer)

"To an extent, if you have to separate this from that it's going to take time; we don't want to be forced to take time to separate them - 'separate this, separate that' - it's going to be time."
(Property developer, 1-10 staff, South London)

Lack of information:

- Lack of information/knowledge on waste management 6%

Other issues:

- Small volume of waste/small company, do what we can 6%
- The nature of our business 2%
- Landlord controls our waste activity 1%
- No strategic benefit in doing this 1%

(Source: Table 91)

Base = All SMEs (330)

SMEs in all three sectors share the same range of problems. The only difference is that SMEs in the hotels & restaurants sector are more inclined to mention three issues than the other SMEs: a significantly high 20% mention the perceived cost of recycling, 18% cite lack of space, and 18% feel they lack waste information.

The key point here is that there is no one major stumbling block which needs targeting, e.g. the perceived cost of waste collection/recycling. Instead, all issues need to be addressed together to make London SMEs act on waste management:

"Facing up to their responsibilities and having the time and the cost and the structures in place to be able to do it. It's not just one thing, it's quite a number of things. "

(Car dealer, 25-49 staff, North London)

"Firstly knowledge, secondly resources (i.e. facilities), and thirdly attitude."

(Restaurant, 1-10 staff, South London)

The restaurant owner points up another underlying barrier – individuals' own attitudes to waste and the environment also play a part in motivating owners/managers to action. Some are simply not interested, while others have a long-held personal belief in avoiding waste.

"For me, if you waste it then you don't appreciate what you've got, e.g. people who throw half their food away is such a waste as so many people are hungry. This is how I feel about recycling - what I don't use somebody else might make use of it "

(Restaurant, 1-10 staff, South London)

Implications:

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|--|
| <ul style="list-style-type: none">• Supplying information and encouragement will not be enough if the facilities are not readily available, whether that be convenient collection frequencies/times or local recycling centres which businesses can use• SMEs always look for easy actions that do not take up too much time or money |
|--|

3.5.3 Response to Various Possible Motivators

Seven possible motivators were tested in the quantitative survey: SMEs were asked which of these would encourage them to increase their waste management activity. The seven encompassed various motivators, ranging from strategic business benefits for themselves, regulatory compliance (a "push" factor for action), and the motivational "pull" effects of wider environmental and economic benefits for London. These were rotated in each interview to minimise any order effect.

All seven have widespread appeal to these SMEs as motivators to do more about waste. The strongest ones are compliance with regulations and cost neutrality, naturally both major concerns for any business. The least popular – relatively, as still chosen by 61% of SMEs - is the possibility of competitive advantage/new business.

Factors which would increase their company's waste management activity: prompted

	All SMEs
Unweighted base	330
If waste management:	%
... helps your business comply with current and future waste management regulations & guidelines	82
If any extra waste management could be cost-neutral	80
... provided an opportunity to create local renewable energy schemes (which would also reduce carbon emissions)	80
... improves your company's image and reputation by demonstrating you act responsibly	77
.... provided an opportunity to create local jobs/boost London's economy	76
.... increases your staff's morale in helping the environment	68
... helps differentiate your business in order to gain a competitive edge / new business	61

(Source: Table 93)

High levels of agreement about these motivators are found throughout the three sectors, with no significant differences. They achieve particularly high agreement among those who will change/consider changing the way they handle waste, so proving that all these factors can play a part in encouraging change.

In the depth interviews a few new insights emerged to help us better understand SME thinking here:

- they felt it was very unlikely that they would win any competitive advantage, let alone actual business, as their customers are not interested in waste and everybody will be acting responsibly (or is expected to). Instead, this is more of a sub-element of the wider issue of their general reputation and that is a strong enough motivator generally
- the cost-neutrality argument was recognised as waste management primarily involves extra time and effort, rather than expected extra cost. However, it is also possible to cut costs if waste is minimised, or processes improved, and so this could be mentioned. Indeed, one or two SMEs were interested in the wider mission to avoid waste, to think more broadly about environmental actions which benefit the SME's bank balance, such as cutting back on energy usage. One of the hotels had recently started to remove light bubs in some areas
- renewable energy is highly topical, hence the interest levels in using this a solution to waste

-
- in terms of the environment, views were too varied to find a pattern: some are motivated by the planet, some for England, some for London, and some for their very local area, depending on where they live, how nice it is in the area where they work, and their personal views
 - and staff morale is considered less of an issue for SMEs than for large companies – it is enough to invoke the environment without linking it to staff feelings at work.

The environment is the obvious beneficiary in peoples' minds, and so the economic argument comes as a surprise in the depth interviews, but it appears to have some potential to act as an additional argument for action, with careful handling.

Boosting London's economy and creating local jobs is a tangible benefit, and it tends to automatically lead SMEs on to wanting to understand the full life cycle of waste. It makes them wonder what does happen to their waste, not only in terms of whether money is being made (SMEs can be suspicious of this, of course), but also what does actually happen to their waste.

Thus, there is a call for information from a few SMEs in the depths to reassure them that all this separating effort is worthwhile, that the waste is being genuinely recycled, and that the overall economics do stack up. They take on trust that recycling is a good thing, but it would be nice to have some basic information and reassurance.

"The best way is to show people how one can recycle different types of waste. It's a matter of educating different sectors of industry on how to dispose of that waste - and what happens to that waste afterwards. What do they do with it? I don't know what they do with it. They say recycle, but where does it go? I always wondered what happened to the paper we send out - do they sell it to somebody? Does anyone make money out of it? That's a very important question. And if somebody does make money out of it, where does this money go to? And if people think it's going to a good cause which will benefit them or the community in general I think more people will go out of their way to do it. If they produce something like that it will make me understand better why I am recycling and why I should make the effort to recycle. I've never thought of it the way you're talking about it - if they complete the circle to make me understand what happens to that waste I'd probably go more out of my way to recycle more items, because if I think this waste will do good for my local community, create jobs or be recycled into energy-efficient projects, I'd make more effort - and so would others."

(Travel agent, 1-10 staff, South London)

"They've got to prove what they are going to achieve at the end of it. If they want to get everyone to join in and do it, they've got to make sure it does happen, that they see it through. If everyone's going to start disposing of the stuff separately - which is going to create more work - there's nothing worse than finding out that it's all going to go in the same bin anyway. They just have to explain to us where it's going and what's happening to it, that it's not going to a landfill site."

(Locksmith, 11-24 staff, North London)

"I've had an old drum of resin or paint, a 50 gallon drum, one of those great big things, and they wanted £180 to take it away and there's a certificate of removal, and then you wonder if they've dumped it somewhere."

(Headgear wholesaler, 11-24 staff, South London)

"It depends how recyclable it is - is it better than in a landfill? Is it harder to re-use glass? Is there a huge cost to recycling - what can you make out of it once you've recycled it?"

(Restaurant, 1-10 staff, City)

Implications:

- | |
|--|
| <ul style="list-style-type: none">• Clearly there are many messages which can be deployed to add to the rationale for SMEs to change their waste practices, with the important caveat that they need to be provable• The environment argument needs to embrace many levels (from the planet to their local area) in order to touch everybody's focus of interest• The economic argument needs careful handling |
|--|

Additionally in the depths we floated some other possible arguments to spur on sustainable waste management activity. A London-wide appeal based on low levels of recycling to date is not motivating at all: while people are shocked by the statistics, they can also see very good reasons why London is a special case, given the density of population and housing, the difficulties of its road network, and the lack of space for new recycling/waste management facilities. Instead, it serves to deflate enthusiasm and commitment and makes people doubt what they can do, as they are only a small SME with small volumes of waste. It can even begin to make them doubt their efforts at home.

Instead, a more positive rallying point would be the Olympics, or simply the knowledge that everybody is playing their part, across London:

"I would be proud to be part of it because I would know that everybody makes an effort to keep it going - to clear the waste in London. ... Everybody is watching London because of that (the Olympics) so maybe we could use that to push people to be careful, to show that everybody can do it, and we do it and we care about that."

(Photographer, 1-10 staff, South London)

Implications:

- | |
|--|
| <ul style="list-style-type: none">• Information and encouragement needs to be handled carefully and positively so that existing activity is built on, rather than undermined at the sheer size of the waste management problem |
|--|

3.5.4 Need for Incentives vs Regulations

The majority of SMEs say that their company would undertake more waste management activities if they were offered an incentive: 72%.

The surprise result is therefore the size of the rejector group: 28%, as it is unlike business to turn down a possible good deal. **(Source: Table 95)**

Those who are significantly more likely to be swayed by an incentive are, naturally:

- those who are not currently active (82%, compared to 62% who already feel that they are doing as much as they can)
- those who say they will consider possible actions for the year ahead (82%, compared to 65% who say they will continue as they are)
- and also the mid-size SMEs with 10 – 50 employees (91%, compared to 78% of larger SMES and only 67% of small companies with under 10 staff).

There, is however, no statistically significant difference by sector type.

The sorts of incentives these SMEs would be most interested in are largely financial (cited by seven in ten), with a variety of ways of calculating/providing financial support as listed below. There is again no sector difference whatsoever in appeals for financial incentives. (Source: Table 97)

However, not all SMEs envisage a direct financial incentive: some seek practical help to make it easier and others think some form of accreditation/status system based on best practice information would be a positive incentive for their company to do more.

Main spontaneous suggestions among those motivated by an incentive (unweighted base = 268 SMEs)

Financial:

- | | |
|--|-----|
| • any sort of financial incentive | 41% |
| • free collection | 19% |
| • cut business rates/provide tax relief/tax breaks | 9% |
| • free bags for recycling provided | 8% |
| • subsidise/finance/a grant for initial set-up costs | 6% |
| • money back guarantee | 2% |

Status/information:

- | | |
|---|-----|
| • accreditation system/best practice guidance | 10% |
| • advertising/publicity/information | 4% |

Practical:

- | | |
|---|----|
| • provide new technology to help separate rubbish | 4% |
| • provide bins/recycling containers | 3% |
| • make it easy/user friendly | 3% |
| • regular/convenient collection service | 1% |

"I wouldn't have a problem doing all the things, provided they were made available to us, like the cardboard baling thing and the paper thing, before it became legislation."

(Car dealer, 25-49 staff, North London)

(Source: Table 96)

Conversely, if we look at why some SMEs are prepared to turn down the offer of an incentive, we find that most do so because there is simply nothing more they can do: either because of the nature of their business, and/or because they do not create much waste anyway, and/or they are already doing all they can so they do not need any incentive. (Source: Table 98)

In the depth interviews, where there was more time to explore this issue, there were mixed views on the need for incentives, ranging from the hard belief that the only real motivator for business is money to the softer view that most people want to be responsible, and would not need to be paid directly:

"It would be a big winner. It would make a big difference. People would make much more effort to separate items - it would take more time, but it would be a big win straightaway."

(Bike shop)

"If they don't do it by themselves the only way to motivate them is to give them some money back, to pay less business rate or something - just to push them to do that. I don't agree that we should give them incentives to help them - they should just do it, but you could give them less business rate to motivate them."

(Photographer)

"'Do this and you'll be a nice green person'. Give us the tools to do it. I don't need financial reward to do it, provided it's cost effective."

(Car dealer)

"Money is a good incentive – but you have to measure that in terms of the bigger picture. If it's not going to be, percentage wise, enough impact on your bottom line I don't think you are going to get anywhere. Sometimes you just need the extra law. (Prompted then on idea of status/certification) It's something that I believe that, as a business, we need to make our clients aware of - the way that we are interested in waste and the way we are actually contributing to it. I would like to put something like that, if it's nice enough, somewhere where it's visible."

(Hotel, 50-250, central London)

Some SMEs become concerned about the extra effort involved in any potential system to monitor waste management in order to be awarded the financial incentive or the status badge – they therefore tend to backtrack to keeping it simple to avoid extra paperwork and cost burdens. One can see how the existing waste transfer note system could form the basis of this, provided the benefit was a tangible rebate on business rates.

However, in the hospitality sector, there were a couple of tangible solutions: the hotel manager cites the Green Globe monitoring scheme used by the Marriott Group, and one restaurant (which displays many logos on its front door) is already paying for a company called Food Solutions to come in and monitor its hygiene and food management standards regularly, having completed a food and safety course.

Implications/ideas:
<ul style="list-style-type: none">• Incentives of various kinds, but primarily financial, will obviously push SMEs to act• But budgets spent on education/information will also have a wide impact, as many business appear willing to act for free• And equally budgets invested in infrastructure and making collection services cheaper will encourage a broader SME uptake

-
- Existing status monitoring or licensing or training schemes could be extended to include waste, so increasing uptake and embedding best practice

The idea of “sticks”, penalties or rules and regulations, tends to be roundly rejected by these SMEs interviewed in-depth. They feel they pay enough taxes already, and penalties/regulations are considered unnecessary and even counter-productive, a “bullying” approach to business. They suspect it will encourage more fly-tipping.

"It's quite difficult because every business is different. You can put rules and regulations in place that would be totally irrelevant and unachievable for some businesses - our business is so completely different to an office block or to a hospital or a shop, the kind of waste we produce."
(Hotel, 50+ staff, central London)

Their clear preference is therefore for “carrots”, including education, rather than “sticks”, though, for the recalcitrant few, penalties and legislation may be the only solution to tackle poor waste management.

"I think incentives would be better. Incentives are encouraging people to do something knowing they will get something back for it. But when you bring in a big stick, that might deter people."
(Restaurant, 1-10 staff, South London)

"Educating people is the best way - most people are responsible people. No-one likes to create harm to the planet, obviously. If you damage where you live then you're not going to have much of a place to live in. The best way to do it is to make people see the benefits of disposing of it in an environmentally friendly way and then they'll go and do it. If you try and force people by penalties it may work 80% of the time and 20% not."
(Travel agent, 1-10 staff, South London)

"If I'm going to be cynical - probably legislation, because if I was running a shop the last thing I'd be worrying about was the rubbish. Legislation and education. They need to be constantly aware so mailshots, emails - it needs to be rammed down people's throats. If you want something done, some people are brilliant and it's done straightaway, other times you have to keep on and on. As soon as people have to start paying, there's a certain percentage - albeit small - that I don't think we'll ever win over."
(Printer, 11-24 staff, West London)

3.5.6 One Focus for The London Assembly

Finally, in both the qualitative and quantitative parts of this study SMEs were asked what ONE thing the London Assembly should focus its efforts on to get more SMEs in London to increase their waste management activity.

Most SMEs are able to give an answer here and these typically range over familiar ground, covering issues such as providing information and publicity to raise awareness of waste as a key issue, providing the

facilities/infrastructure to make it easy for SMEs to do more, and offering financial help via free or lower cost collection services.

Note how the issue of financial incentives has moved to the backburner despite so many SMEs saying it would help them to act: SMEs know they are unlikely to get financial help. Instead they respond in the context of the London Assembly's likely areas of influence.

Main spontaneous suggestions: echoing earlier themes

Information

- **Free guidance/best practice/information** **17%**
- Advertise the issues surrounding and the benefits of waste management 9%

"Making sure everybody's aware and knows what to do and how to go about it, as that's the biggest problem - having the knowledge to know where to go and get it sorted out. I think there's a lack of easily obtainable information."
(Printer)

"Educating people is the number one priority. It's everybody's responsibility. Most businesses do produce paper waste, for example, and they can be categorised - paper, plastic, glass, and educate people for each item."
(Travel agent)

"Yes, everyone lacks basic awareness of how the waste is used. I believe 90% of restaurants would do it."
(Restaurant)

"I don't think there is any general guideline. I know, from looking into our environmental policy, we've just gone onto various companies' websites and downloaded their environmental policy and looked at what they've done. If there is a template out there 'this is how it should look'. There should be more help and saying, 'These are the areas you need to look at, these are the things you need to consider,' because a lot of the time you have to make it up and fly blind. Just provide a bit more assistance."
(Hotel)

Practical help:

- **Make more recycling bins available** **12%**
- Do more regular collections (and make people aware of collections) 5%
- Make it easier/more convenient 4%

"Basically provide the service with the bins - I'd be more than happy to put individual stuff in individual bins."
(Locksmith)

"Here, because there are so many small businesses (on the trading estate) everybody would like to have more special skips to recycle everything - glass, plastic, because we are all using that and I think everybody would go downstairs and put that in the special skips. If we can have someone, as we have at home, to come and

collect it that would be a good way to do it and I am sure a lot of businesses here would do it."

(Photographer)

Financial

- | | |
|--|----|
| • Make it free – free collections/recycling | 6% |
| • Subsidise business to get started | 4% |
| • Offer an incentive/financial incentive | 4% |
| • Make it more cost-effective/cheaper | 3% |
| • Reduce business rates | 2% |
| • Provide a points/voucher system for recycling/
increased waste activity | 2% |
| • Drop congestion charge for travelling to
recycling/waste facility | 2% |

"I suppose it comes back to having a financial incentive, because if you're not doing it, it would be nice to get it, and if you're doing it already it's a bit of extra money."

(Kitchen & bathroom retailer)

Penalties/regulations

- | | |
|--|----|
| • Make it compulsory/have regulations/penalties
for those who do not comply | 4% |
|--|----|

(Source: Table 95)

A variety of important new specific ideas also emerge in the quantitative study: a one-stop solution to make life easier for SMEs, a clear lobbying & campaigning role for the Assembly to make the Councils change their ways and to put pressure on packaging users.

New ideas:

- | | |
|--|-----|
| • One supplier to meet all our needs/one stop shop/streamline the whole
process from requesting quotes to arranging pick-up as the current process
is too time consuming | 10% |
| • Provide a universal system for all Councils | 6% |
| • Lobby Councils to encourage more recycling | 6% |
| • Employ the same practices used for residential recycling | 2% |
| • Promote environmentally friendly packaging | 4% |

(Source: Table 99)

The one-stop solution is the only idea where a sector difference is clear: this practical solution is far more likely to be raised by SMEs in the hotels & restaurants sector (a high 23%).

The depth interviews yielded many of the same ideas, harking back to many earlier points raised in the interviews, about Councils providing more facilities and services across London, so that the business community can act. **Simply providing SMEs with the basic "tools" to do the job is considered a key thing to focus on:**

"Give us the facility to dispose of our cardboard, paper and plastics - they are all things that are easily recyclable - the containers to put it in and have it collected."
(Car dealer)

"I'd like to see the Government make more effort to get local Councils to do more recycling with more products. Plastic is the biggest issue and they can't keep ignoring it any longer The Government should do the running around, instead of leaving it for us to use our own initiative and try to deal with these products ourselves."
(Bike shop)

Significantly, in the depth interviews the approach of visiting their premises and seeing how each individual company operates – the constraints it is under and the volumes and types of waste involved – was found to be educating and motivating in its own right. This model would be too expensive to adopt wholesale, of course, but the essence of it can be carried through in the approach and tone taken by the GLA, as follows:

"Actually coming in and making you aware of your own responsibilities - not in a bullying fashion, but in a way that entices you to do something. 'We want to try and help you cut down on waste and deal with your waste professionally and properly.'"
(Bike shop)

"If they send round letters with red writing on them saying, 'you must reduce your weights to so many pounds a week and if you don't you'll go to prison and you'll be fined.' I find it intolerable the attitude of central government, and local government in some ways, to industry, however small. We are treated like children, when we're highly responsible and I find that objectionable."
(Headgear wholesaler)

"People generally are quite responsible - if they are treated like an adult they will act accordingly."
(Travel agent)

Implications:

- | |
|---|
| <ul style="list-style-type: none">• Adopt the right tone of partnership – not a parent to child tone, but an adult to adult tone: "how you/we can help"• SMEs are largely willing to do their bit, if it is made easy for them – they just need to be made aware of what they could be doing |
|---|

"I have found this very fascinating because it's given me cause for thought because really I never think about waste, other than the fact that I think, 'Oh, I want to bundle that piece of cardboard up and get it out the way', I don't actually think about it. I found it quite stimulating and I shall think about what else we can do."
(Kitchen & bathroom retailer, 11-24 staff, South London)

"I think what we are doing here today: that's very powerful, being confronted with the whole issue of it. I don't think anyone can sit with you, work through this, and say, 'I don't want to be part of that.'"
(Hotel, 50-250 staff, central London)

APPENDICES

- 1. SME WASTE MANAGEMENT QUESTIONNAIRE**
- 2. SURVEY SCREENER**
- 3. WASTE TOPIC GUIDE**

SME WASTE MANAGEMENT QUESTIONNAIRE

INTRO 1

Good morning/afternoon, my name is ----- calling from GfK NOP, an independent market research agency on behalf of The London Assembly. Could I please speak to [INSERT NAMED CONTACT] OR IF BLANK: the person within your organisation responsible for waste management policy and procedures?

INTERVIEWER INSTRUCTION: if person is unsure of whom you should speak to, ask to speak to a senior manager or the owner/managing director.

INTRO 2 - WHEN SPEAKING TO APPROPRIATE PERSON

GfK NOP has been commissioned by The London Assembly to understand how businesses like yours go about waste management in your business.

We are focusing on small and medium-sized businesses as a lot of research has been conducted among large businesses so far and so we want to understand your perspective.

The interview will take between 10 and 15 minutes to complete. The survey is completely confidential and no information which could identify you or your company will be passed on to the London Assembly without your consent.

IF NECESSARY ADD THE FOLLOWING:

GfK NOP Research Group is a member of the Market Research Society and abides by its strict code of conduct

SCREENERS

S1. Are you the most appropriate person to speak to about waste management in your company?

Yes	1	GO TO S3
No	2	GO TO S2

S2. Who would be the best person to talk to in your organisation?

PROBE FOR DEPT/JOB TITLE IF DON'T KNOW [INTERVIEWER: E.G. Facilities Manager]

a. Record name and telephone number

Ask to be transferred

If transferred start from INTRO 2	1
If not dial again and start from INTRO 1	2

b. If no name provided probe for :

Facilities management	3
Senior manager	4
Managing director	5
The owner	6

Record department_____ / Telephone number_____

Recall and start from INTRO 1

c. If refused thank and close 7

S3. Would now be a convenient time to go through the survey?

Okay to continue	1	GO TO Q. 1
------------------	---	------------

Arrange appointment	2	Check contact details Write in date_____ / time_____
---------------------	---	---

Refusal	3	Thank and close
---------	---	-----------------

SECTION A: RESPONDENT BACKGROUND

READ OUT

Firstly I would like to ask you questions regarding your employment and your company.

ASK ALL

Q.1 What is your job title?

CATI INSTRUCTION: PROVIDE CODE FRAME

Record job title _____

IF OWNER / PROPRIETOR GO TO SECTION B

DO NOT READ OUT

Q.3 Gender

INTERVIEWER INSTRUCTION: SINGLE CODE / DO NOT READ OUT

Male	1
Female	2

SECTION B: COMPANY BACKGROUND

ASK ALL

Q.4 What is your company's main business activity?

CATI INSTRUCTION: [Populate with descriptions from SIC 2003 / abbreviate list]

Write In _____	1
DK	2
Refused	3

CATI / INTERVIEWER: CHECK AGAINST SAMPLE INFORMATION AND CONFIRM SECTOR CLASSIFICATION / THIS RESPONSE WILL BE USED TO CONTROL QUOTA

ASK ALL

Q.5 Which of the following best describes your organisation?

INTERVIEWER: READ OUT / SINGLE CODE

1. Sole Proprietor / Proprietorship – a type of business entity which legally has no separate existence from its owner.
2. Partnership – a type of business entity in which partners share with each other the profits or losses of the business undertaking in which all have invested.
3. Company
4. Franchise – a franchisor licenses trademarks and tried and proven methods of doing business to a franchisee in exchange for a recurring payment, and usually a percentage piece of gross sales or gross profits as well as the annual fees

ASK ALL**Q.6** How long has your company been established?

Write in _____ months 1 / _____ years 2

INTERVIEWER: PROMPT FOR RANGE IF DON'T KNOW

Months		Years	
> 1 month	3	> 12 months < 1 year	14
> 1 < 2 months	4	> 1 < 2 years	15
> 2 < 3 months	5	> 2 < 3 years	16
> 3 < 4 months	6	> 3 < 4 years	17
> 4 < 5 months	7	> 4 < 5 years	18
> 5 < 6 months	8	> 5 < 6 years	19
> 6 < 7 months	9	> 6 < 7 years	20
> 7 < 8 months	10	> 7 < 8 years	21
> 8 < 9 months	11	> 8 < 9 years	22
> 9 < 10 months	12	> 9 < 10 years	23
> 11 < 12 months	13	10 +	24
		DK	25
		Refused	26

ASK ALL**Q.7** How many sites does your company have in London?

INTERVIEWER: READ OUT / SINGLE CODE

1	1
2 – 5	2
6 – 10	3
11 – 15	4
16 +	5
DK	6
Refused	7

ASK ALL**Q.8** How many employees, including both full-time and part-time, are employed by your company within London?

INTERVIEWER: READ OUT / SINGLE CODE

1 - 9	1
10 - 49	2
50 - 249	3
DK	4
Refused	5

CATI / INTERVIEWER: CHECK AGAINST SAMPLE INFORMATION AND CONFIRM COMPANY SIZE CLASSIFICATION / THIS RESPONSE WILL BE USED TO CONTROL QUOTA.

ASK ALL

Q.9 What is your company's approximate annual turnover excluding VAT?

Write In_____ (000's) 1

INTERVIEWER: IF DON'T KNOW, PROMPT FOR RANGES / SINGLE CODE

Less than £50 thousand	3
£50 and less than £100 thousand	4
£100 and less than £250 thousand	5
£250 and less than £500 thousand	6
£500 and less than £1 million	7
Between £1m and less than £2 million	8
Between £2m and less than £5 million	9
Between £5m and less than £10 million	10
Between £10m and less than £50 million	11
£50 million or more	12
Don't know	13
Refused	14

SECTION C: ISSUES REGARDING THE ENVIRONMENT, SUSTAINABILITY AND CORPORATE SOCIAL RESPONSIBILITY

READ OUT

I would like to start by asking you about your company's behaviour.

ASK ALL

Q. 10 Does your company take an active interest in environmental and sustainability issues, i.e. Business activity that reduces its negative impact on society, on the environment and on economic prosperity?

INTERVIEWER: READ OUT IF NECESSARY

By an active interest we mean the way your company behaves as a result of caring about the issues mentioned.

INTERVIEWER: DON'T READ OUT / SINGLE CODE

Yes	1
No	2
DK	3

ASK IF Q10 = 1

Q. 11 Can you give me an example of how your company takes an active interest in these issues?

INTERVIEWER: DON'T READ OUT / MULTI CODE.

1	Set up of policies and processes to minimise impact / damage on environment.
2	Recycling / reusing activity in office
3	Energy Efficiency such as turning off lights, using energy efficient lighting, turning off computers when leaving the office
4	Other Write in _____
5	Can't give example

ASK ALL

Q. 11a Does your business operate within the Green Sector or as a Green Brand?

EXPLAIN IF NECESSARY: By "green" we mean environmentally aware, or natural or organic – for example, an organic restaurant (for catering sector), selling cycles (for retailing sector), or consultant who provide advice on the implementation of sustainable technologies (for business services sector) i.e. filtered for each sector

INTERVIEWER: DON'T READ OUT / SINGLE CODE

Yes – within Green Sector	1
Yes – as a Green Brand	2
No	3

SECTION D: GENERATION OF WASTE

READ OUT

Now I would like to focus on your company, the waste it generates and the policies and procedures in place for dealing with waste.

ASK ALL

Q. 12 Thinking quite generally, whose responsibility is the waste generated by your business?

INTERVIEWER: DON'T READ OUT / PROMPT IF NECESSARY / MULTI CODE

- | | |
|---------------------|---|
| Your business | 1 |
| Your suppliers | 2 |
| The local council | 3 |
| Central government | 4 |
| Other write in_____ | 5 |

ASK ALL

Q. 13 What types of waste does your business generate?

INTERVIEWER: READ OUT LIST FROM TABLE BELOW / MULTI CODE

ASK IF Q13 <> 14

Q. 14 What percentage does each type of the waste generated contribute to your monthly waste?

INTERVIEWER: READ OUT TYPES OF WASTE GENERATED

ASK IF Q13 <> 14

Q. 15 I am going to run through the list of the waste your company generates and I would like you to tell me how you dispose of each type?

INTERVIEWER: GO THROUGH LIST OF WASTE GENERATED / PROMPT IF NECESSARY / MULTI CODE

Throw away into general waste bins

Recycle through waste management company

Recycle through domestic channels (ie in recycle bins at home)

Recycle through community recycling bins on high street

Set aside for company who deal in specific waste type collection e.g. electrical waste

Use a local business or community initiative & write in_____

Send waste back to supplier

Take to local tip

Other write in_____

GENERIC LIST

	TYPES OF WASTE	Q13	Q14	Q15
1	Paper			
2	Cardboard			
3	Glass			
4	Plastic (H/R exclude packaging / cutlery / cups)			
5	Electrical and Electronic Items			
6	PC & Hardware e.g. printers			
7	PC Consumables – e.g. ink cartridges			
8	Furniture			
9	Food Waste (H/R go to expanded list)			
10	Other specialist materials – metal			
11	Other specialist materials – oils			
12	Other specialist materials – toxic chemicals			
13	Other Write In (1) _____			
14	No Waste Produced so EXCLUDE??	GO TO SECTION G		
			INTERVIEWER: Check Total = 100%	

H/R Hotels /Restaurant LIST

	TYPES OF FOOD WASTE	Q13	Q14	Q15
20	Edible Food Waste			
21	Rotting Food Waste			
22	Composting			
23	Cooking oils and fats			
24	Plastic Packaging			
25	Plastic Cutlery / Plates / Cups			

ASK ALL

Q. 16 So to summarise, which one of the following comes closest to describing how active your business has been in managing the amount of waste it generates?

INTERVIEWER: READ OUT / SINGLE CODE

My business

1. Has already acted to reduce waste as much as possible, by reusing, recycling, and generally minimising waste coming into and out of the business
2. Has been doing some recycling or minimising waste for years
3. Has recently begun recycling or minimising waste
4. Has thought about recycling or minimising waste but found various problems in actually doing it
5. Has thought about recycling or minimising waste but not done anything
6. Has not thought about any change in our waste management approach
7. DK

ASK IF Q16 = 4 /5

Q. 16a Can you tell me why?

INTERVIEWER PROBE: ANY OTHER REASON? DO NOT READ OUT.

No time to look into this
No time to separate waste each week,
Will Cost us money,
No space to store waste,
Don't know what to do about types of waste
Don't know who to use to collect our special waste,
No recycling facilities run by Council for businesses,
Never thought about this before!
Other write in
DK

ASK IF Q16 = 1 - 3

Q. 16b Can you tell me why?

INTERVIEWER PROBE: ANY OTHER REASON? DO NOT READ OUT.

I want to be a responsible business
I want to protect the environment/look after the planet
We all need to do our bit
It's the law re that type of waste
My landlord obliges us to do it
The staff want to do it/are active on issues like this
My customers expect it of us
We are a green business/run ethically
It doesn't cost any money – just time/effort
Recycling at home has meant I've started to do it at work
Other write in
DK

ASK IF Q16 = 1 - 3

Q. 17 Do you make your customers aware that you have waste management policies and procedures in place?

Yes 1 GO TO Q17b

No 2 GO TO Q18

ASK IF Q17 = 1

Q. 17b Why do you make your customers aware that you have waste management policies and process in place?

INTERVIEWER: DON'T READ OUT / MULTI CODE

1. Customer demands this of us so we make them aware
2. Competitive advantage derived for being seen as environmental
3. Competitive advantage over our competitors who don't advertise / employ a waste management policy
4. It provides us with a reason to contact our customers
5. Other write in _____
6. Don't know

ASK IF Q13 <> 14

Q. 18 Approximately how much do you spend disposing of waste on a monthly basis?

INTERVIEWER: IF RESPONDENT CAN ONLY GIVE A YEARLY FIGURE DIVIDE AMOUNT BY 12.

INTERVIEWER: DON'T READ OUT

Write in _____ (00's) 1

Write in _____ (000's) 2

INTERVIEWER: IF DON'T KNOW, PROMPT FOR RANGES / SINGLE CODE / IF RESPONDENT CAN ONLY GIVE A YEARLY FIGURE DIVIDE AMOUNT BY 12.

0	3
1 – 50	4
51 – 100	5
101 – 150	6
151 – 200	7
201 – 300	8
301 – 400	9
401 – 500	10
501 – 600	11
601 – 700	12
701 – 800	13
801 – 900	14
901 – 1000	15
1,001 – 2,000	16
2,001 – 3,000	17
3,001 – 4,000	18
4,001 – 5,000	19
5,001 – 6,000	20
6,001 – 7,000	21
7,001 – 8,000	22
8,001 – 9,000	23
9,001 – 10,000	24
10,000 +	25

Don't know 26 GO TO 18A

Refused 27 GO TO SECTION F

ASK IF Q18 = DK

Q. 18a Why don't you know how much you spend on disposing of waste?

Interviewer Probe – Could it be covered by some other charge?
– What charge is that?

Covered in landlords' service charge	1
Covered in council business rates	2
Other write in	3
DK	4

NEW SECTION F: WASTE MANAGEMENT

READ OUT

We are now going to talk about waste management, which is the collection, transportation, processing and disposal of waste materials.

ASK ALL

Q.19 Does your business have direct control over how you dispose of your waste, or is it organised on your behalf by your landlord (eg of industrial estate, business park or serviced building)?

INTERVIEWER: MULTI CODE

Yes, direct
No, landlord
Both
DK

ASK ALL

Q.19a Which of the following best describes your company's waste management approach?

INTERVIEWER: READ OUT / MULTI CODE

1. We have a **written** policy and procedures in place
2. It is not written down, but is an inherited / embedded process which all our staff follow
3. We have an ad-hoc approach, i.e. our staff are free to decide
4. It is imposed / dictated to us – for example waste is sorted every two weeks to coincide with the local council's waste collection service, or our landlord obliges us to recycle cardboard

ASK ALL

Q. 20 Are you currently doing any of the following?

INTERVIEWER: READ OUT / MULTI CODE

Q.20a Would you consider doing any of the following?

INTERVIEWER: READ OUT / MULTI CODE

CATI – Q. 20a list to exclude responses to Q20

	<u>Q20</u>	<u>NA</u>	<u>Q20a</u>
Recycling of packaging/items (can you filter out those who already do this?)			
Implementing a Paperless Office			
Reducing packaging on the goods you supply (if applicable, eg not business services?)			
Specifying to your suppliers the need for minimum packaging			
Improving quality control and process monitoring in order to minimise waste generated by your business			
Resource optimisation – getting the most out of your resources			
Reusing scrap material in your business			
Waste exchanges - where the waste product of one process becomes the raw material for a second process			
Ship to point of use – Making deliveries of incoming raw materials or			

components direct to the point where they are used can minimise handling and the use of protective wrappings			
AND FINALLY, Extended Producer Responsibility – INCLUDING the environmental costs associated with products throughout their life cycles into the market price of the product			

ASK ALL

Q. 21 How important is waste management in relation to other aspects to do with running your business?

INTERVIEWER: PROBE FOR STRENGTH OF AGREEMENT / READ OUT / SINGLE CODE

Is it...

Extremely important	7
Very important	6
Important	5
Neither important nor unimportant	4
Unimportant	3
Very unimportant	2
Extremely unimportant	1

SECTION G: ADVICE AND SUPPORT STRUCTURE

READ OUT:

I would now like to ask you your views on the bodies or organisations responsible for promoting waste management programmes and providing you with advice and support on waste management matters in your borough.

Firstly I would like to focus on the provision of **general** business advice and support.

ASK ALL

Q. 22 Which types of organisations and or bodies does your company use **for business advice and information in general?** This includes organisations and bodies used in the past.

INTERVIEWER: DON'T READ OUT / MULTI CODE

- | | |
|---|------------|
| Your local council | 1 |
| Central Government | 2 |
| London Development Agency | 3 |
| Trade associations – sector specific, CBI, Federation of Small Businesses 4 & <u>WRITE IN NAME OF TRADE ASSOCIATION</u> _____ | |
| Business advisers: Business In the Community | 5 |
| Accountant | 6 |
| Lawyer | 7 |
| Other write in _____ | 8 |
| None | 9 GO TO 31 |

ASK IF Q22 = 1-8

Q. 23 What is your preferred method for contacting them?

INTERVIEWER: PROMPT IF NECESSARY / SINGLE CODE

- | | |
|-----------|---|
| Telephone | 1 |
| Email | 2 |
| Post | 3 |
| Website | 4 |

ASK IF Q22 = 1-8

Q. 24 Have you turned to them for advice or support on waste management?

- | | | |
|-----|---|-------------------------|
| Yes | 1 | CONTINUE |
| No | 2 | <u>GO TO Q29</u> |

ASK IF Q24 = 1

Q. 25 What sort of advice and support were you looking for?

INTERVIEWER: DON'T READ OUT / PROMPT IF NECESSARY / MULTI CODE

- | | |
|---|---|
| Basic needs – info/advice/support, checklists of what to do/processes | 1 |
| Waste management company contacts, searchable supplier directory | 2 |
| Other write in 1 _____ | 3 |

ASK IF Q24 = 1

Q. 26 How satisfied were you with the advice you received?

INTERVIEWER: READ OUT / SINGLE CODE

Were you...

- | | |
|------------------------------------|---|
| Extremely satisfied | 7 |
| Very satisfied | 6 |
| Satisfied | 5 |
| Neither satisfied nor dissatisfied | 4 |
| Dissatisfied | 3 |
| Very dissatisfied | 2 |
| Extremely dissatisfied | 1 |

ASK IF Q24 = 1

Q. 27 What could they have done to improve the service you received?

Write In _____

ASK IF Q24 = 1

Q. 28 How likely are you to recommend them as a source for information and advice on waste management?

INTERVIEWER: READ OUT / SINGLE CODE

Are you...

- | | |
|-----------------------------|---|
| Extremely likely | 7 |
| Very likely | 6 |
| Likely | 5 |
| Neither likely nor unlikely | 4 |
| Unlikely | 3 |
| Very unlikely | 2 |
| Extremely unlikely | 1 |

INTERVIEWER: GO TO Q31

ASK IF Q24= 2

Q. 29 Would you turn to them for advice on waste management?

Yes	1	GO TO Q30
No	2	GO TO Q31

ASK IF Q29 = 1

Q. 30 What sort of advice and assistance would you be looking for?

INTERVIEWER: DON'T READ OUT / PROMPT IF NECESSARY / MULTI CODE

Basic needs – info/advice/support, checklists of what to do/processes	1
Waste Management Company contacts, searchable supplier directory	2
Other write in 1 _____	3

ASK ALL

Q. 31 Are there any other types of organisations you have talked to for advice on waste management?

Yes 1 **GO TO Q31a**
No 2 **GO TO Q36**

Q. 31a Can you name them please?

Yes 1 INTERVIEWER: CODE ALL THAT APPLY COLUMN Q31A / DO NOT READ OUT

No 2 GO TO Q36

Organisations	Q31a
London First	1
London Remade	2
Envirowise	3
Business in the Environment	4
WRAP	6
Waste Watch	7
Carbon Trust	12
Environment Agency	13
Chartered Institute of Waste Management	14
Veolia Environmental Services	15
Other write in 1 _____	16
Other write in 2 _____	17
Other write in 3 _____	18
Other write in 4 _____	19
Local Council	20
Local Waste Authority	21
Netregs	22

ASK IF Q31 = 1

Q. 32 How satisfied were you with the advice you received from <from Q31a>?

CATI Scriptwriter repeat question for each answer given at at Q31a>

Were you...

Extremely satisfied	7
Very satisfied	6
Satisfied	5
Neither satisfied nor unsatisfied	4
Unsatisfied	3
Very unsatisfied	2
Extremely unsatisfied?	1

ASK IF Q31 = 1

Q. 33 What could they have done to improve the service you received from <from Q31a>?

CATI Scriptwriter repeat question for each answer given at Q31a

Write In _____

ASK IF Q31 = 1

Q. 34 How likely are you to recommend <from Q31a> as a source for information and advice on waste management?

CATI Scriptwriter repeat question for each answer given at Q31a

Extremely likely	7
Very likely	6
Likely	5
Neither likely nor unlikely	4
Unlikely	3
Very unlikely	2
Extremely unlikely	1

ASK IF Q24 = 2, Q29 = 2 & Q31 = 2

Q. 35 Why haven't you sought advice on waste management from any bodies or organisations?

Write In _____

ASK ALL

Q. 36 Are there **any other** organisations or bodies that you are aware of that provide advice and support on commercial waste management?

Yes 1 **CONTINUE**
 No 2 **GO TO Q38**
 DK 3 **GO TO Q38**

ASK IF Q36 = 1

Q. 37 If yes can you name them please?

Yes 1 Code all that apply below from the list below

CATI / INTERVIEWER – MAKE SURE LIST EXCLUDES THOSE
MENTIONED AT Q31a

No 2 GO TO Q 38

ASK IF Q37 = 1

Q. 38 Have you heard of any of the following?

CATI / INTERVIEWER – MAKE SURE LIST EXCLUDES THOSE
MENTIONED AT Q31a and Q37

Organisations	Q37	Q38
London First	1	1
London Remade	2	2
Envirowise	3	3
Business in the Environment	4	4
WRAP	6	6
Waste Watch	7	7
Carbon Trust	12	12
Environment Agency	13	13
Chartered Institute of Waste Management	14	14
Veolia Environmental Services	15	15
Your local Waste Authority		
Netreg		
Your Local Council		
Other write in 1 _____	16	16
Other write in 2 _____	17	17
Other write in 3 _____	18	18

ASK IF Q31 = 1 or Q36 = 1, or Q38 is not NULL

Q. 39 Please can you tell me how you found out about the bodies and or organisations you have mentioned?

INTERVIEWER: DON'T READ OUT / PROMPT IF NECESSARY / MULTI CODE

Contacted by a representative of the body / organisations	1
Received information in the post	2
Heard about the service provided at a borough meeting	3
Read about in your boroughs newsletter	4
Searched for them on the internet using yell / Google	5
Accessed your boroughs website and follow a link	6
Heard of name / seen name around	9
Read about in a magazine	10
Heard about on radio	11
Saw an advert on TV	12
Read about on internet	13
Found in Yellow Pages	14
Other write in	15

SECTION F: OVERALL

I would now like to ask about factors that may influence your waste management activity.

ASK ALL

Q. 40 To what extent do you agree or disagree with the following statements in relation to your waste management activity?

INTERVIEWER: READ OUT STATEMENT AND THEN READ OUT. PROBE FOR STRENGTH OF AGREEMENT

CATI: ROTATE

	Very Strongly Agree 7	Strongly agree 6	Agree 5	Neither agree nor disagree 4	Disagree 3	Strongly disagree 2	Very strongly disagree 1
A. We have enough information on how to improve waste management.							
B. We have more important issues to worry about than waste management.							
C. There is no real business benefit for us in adopting waste management policies and procedures.							
D. The waste we generate has very little impact on the environment.							

ASK ALL

Q. 41 What do you see as the main barriers to increasing waste management activity in your company? Please specify your top three barriers.

1. Write in _____

2. Write in _____

3. Write in _____

ASK ALL

Q42. Which one of the following comes closest to describing what your business will do about waste management in the year ahead?

My business:

1. Will continue with current waste management practices
2. Will consider looking at possible ways to further minimise or recycle
3. Will definitely change some of our waste management practices

SECTION E: CHANGING BEHAVIOUR

READ OUT:

Now we are going to talk about the possible impact of business and regulatory factors and various incentives and initiatives on your company's waste management activity.

ASK ALL

Q. 43 There are different factors that encourage businesses to increase their waste management. Which of the following would encourage you to increase your waste management?

INTERVIEWER: READ OUT

CATI: ROTATE

	YES	NO	NA
A. If waste management improves your company's image and reputation by demonstrating you act responsibly			
B. If waste management helps differentiate your business in order to gain a competitive edge / new business			
C. If any extra waste management could be cost-neutral			
D. If waste management increases your staff's morale in helping the environment			
E. If waste management helps your business comply with current and future waste management regulations & guidelines			
If waste management provided an opportunity to create local jobs/boost London's economy.			
If waste management provided an opportunity to create local renewable energy schemes (which would also reduce carbon emissions)			

ASK ALL

Q. 44 Would your company undertake more waste management activities if your company was offered an incentive?

Yes	1	CONTINUE
No	2	GO TO Q46

ASK IF Q44 = 1

Q. 45 What type of incentive would you be most interested in?

Write in _____

GO TO Q47

ASK IF Q44 = 2

Q. 46 Why wouldn't you increase your waste management activities if an incentive was offered?

Write in _____

ASK ALL

Q. 47 If there was one thing where the LA (London Assembly) could focus its efforts in trying to get more organisations like yours to increase their waste management activity, what would that be?

Write in _____

ASK ALL

Q. 48 The London Assembly is keen to gather a cross-section of views among the business community – can I just check the ethnic origin of the proprietor/owners of the business?

IF NECESSARY: Are they

British or Mixed British	1
Asian	2
Black	3
Mixed Ethnic	4
Prefer not to say	5
Don't know	6

Thank you on behalf of GfK NOP and the London Assembly. If you any queries about our companies credentials please contact the Market Research Society on free phone 0500 396999.

WASTE MANAGEMENT - Depth Recruitment Screener

TO RECEPTION

Good morning / afternoon. My name is ... from GfK NOP, an independent market research agency based in London. GfK NOP is conducting a study on behalf of the London Assembly.

ASK FOR NAMED PERSON IF HAVE NAMED SAMPLE

OR

Could I speak to the person responsible for making decisions relating to waste management/facilities management.

This may be the Owner, MD, Finance Director, Office Manager, Facilities Manager, or possibly the PA to the MD etc.

INTRODUCTION

Good morning / afternoon. My name is ... from GfK NOP, an independent market research agency based in London. GfK NOP is conducting a study on behalf of the London Assembly.

IF NECESSARY ADD:

The London Assembly is made up of 25 members, all elected at the same time as the Mayor. The London Assembly does not have executive powers but it examines the Mayor's activities and investigates other issues of importance to Londoners.

GfK NOP would like to understand how businesses go about deciding waste management policy and the extent to which business are able to minimise waste at every stage of the business process. The London Assembly wants to understand the extent to which businesses in London are able to deal with waste management issues.

This is a vital piece of research for the London Assembly and your input and experience would be invaluable in helping to shape future decisions on engaging companies in waste management as well as minimising waste.

IF NECESSARY: Please reassure that it does not matter if not doing anything at all in this area, or if don't envisage doing this in future – we are interested to hear all perspectives and what the issues and barriers are.

I should like to stress that this is in no way a sales exercise.

IF NECESSARY ADD:

- GfK NOP is a member of the MRS and abides by its strict Code of Conduct.
- No sales approach will be made during, or as a result of, the research project.

As we need to speak to people from a range of different organisations, and with a range of different approaches to waste management, I'd like to ask you a few questions.

Q1 Could you please confirm your job title?

WRITE IN JOB TITLE_____

Q2 And can I confirm that you are either solely or jointly responsible for the decisions relating to waste management, etc to support the running of your organisation?

Yes	1	CONTINUE
No	2	ASK FOR REFERRAL

Q3a How many employees does your organisation currently employ?

WRITE IN ACTUAL NUMBER

1-10	1
11 - 24	2.....
25 - 49	3.....
50 – 250	4.....

251+ _____ CLOSE

CHECK QUOTAS

**NOTE: IF IN DOUBT CHECK THAT COMPANY IS NOT A
SUBSIDIARY OF A LARGER ORGANISATION**

Q3b How would you describe the current status of your company's attitude or policy regarding waste materials and waste minimisation? Please choose one statement.

READ OUT

1. We do not have a policy regarding the disposal of waste materials or minimising waste, and we do not intend to do so in the foreseeable future.
2. We do not currently have a policy regarding the disposal of waste materials or minimising waste, but we are considering doing so in the foreseeable future.
3. We do not currently purchase many recycled goods or products, but we are planning to begin doing so in the next month/at the next order cycle.
4. We have recently begun a policy regarding the disposal of waste materials or minimising waste.
5. We have a long standing policy regarding the disposal of waste materials or minimising waste.

INTERVIEWER INSTRUCTION:

IF NECESSARY: Please reassure that it does not matter if not doing anything at all in this area, or if don't envisage doing this in future – we are interested to hear all perspectives and what the issues and barriers are.

Q4 Can I just confirm the main business activity of your company?
OBTAIN EXACT CATEGORY OF SERVICE, WRITE IN AND CODE BELOW

Wholesale & Retail	1
Hotel/restaurant	2
Business services	3.....

CHECK QUOTAS

Q5 The GLA is keen to gather a cross-section of views among the business community – can I just check the ethnic origin of the proprietor/owners of the business?

IF NECESSARY: Are they

British or Mixed British	1
Asian	2
Black	3
Mixed Ethnic	4
Prefer not to say	5
Don't know	6

AIM TO RECRUIT 2 – 3 BMEs

RECRUIT

We would like to come and talk to you about your waste management decisions. Can we arrange a suitable time?

IF NECESSARY: It does not matter if you are not doing anything at all in this area, or if don't envisage doing this in future – we are interested to hear all perspectives and what the issues and barriers are.

The interview will take no more than an hour.

As a 'thank you' for the time you are giving, GfK NOP is providing an honorarium of £60, or it can be donated to a charity of your choice, if you prefer.

When would be convenient?

DATE:

TIME:

We will send you a letter/email (as preferred) to confirm the appointment.

NAME: _____

JOB TITLE _____

ORGANISATION NAME: _____

WORK ADDRESS: _____

POST CODE _____

DIRECTIONS: _____

WORK TEL. NO.: _____

Please have the MRS verification telephone number to hand, should respondents need it: 0500 396 999.

INTERVIEWERS DECLARATION:

This interview was conducted in accordance with the Market Research Society Code of Conduct and the respondent is not a relative or friend of mine.

INTERVIEWER'S SIGNATURE:..... DATE:.....

WASTE MANAGEMENT TOPIC GUIDE - FINAL

A. INTRODUCTION

GfK NOP, MRS Code of Conduct, confidentiality of tape recording and anonymity of reporting back.

Background to the research:

The London Assembly would like to understand how businesses like yours go about waste management in your business and to what extent businesses are able to minimise waste at every stage of the business process.

We are focusing on *small and medium-sized* businesses as a lot of research has been done among large businesses so far and so we want to understand your perspective. To get a real depth of understanding of waste management decisions we are focusing on [AS APPROPORATE]:

Hotels and restaurants

Retailers and wholesalers

Business service providers

Respondent background

- Job title/role within the organisation
- Length of time with business

Company background

- Company
 - nature of business
 - size by employees
 - no of offices and regional spread
 - length established
 - annual turnover/ health of company: stable, expanding, contracting
- What are the key issues which are currently affecting your business the most – what is top of your agenda?
 - *Note balance: company health, own marketplace factors, external regulation, etc*
- Does your company take an interest in wider environmental/ sustainability issues, or the wider field of responsible business practice/Corporate Social Responsibility (staff, community input/charitable giving, environmental support)?
 - If interested: how active? Policies, recycling/reusing activity in office, etc
 - If interested/active: who initiated this? Customers (eg private/public sector contract requirements), staff enthusiasm, management/owner
 - If not interested: why is that?
 - Perspective on the sorts of companies who do this vs those who don't
 - contrast personal attitudes/actions at home

B. WASTE MANAGEMENT ISSUES – IN GENERAL

- In relation to other aspects to do with running your business, where does waste management and minimising waste fit in?

PROBE:

- Degree of importance – why so much/little? (*may lead to cost issue – see qn below on annual spend*)
- % of your time/role spent on this
- Your role vs. any other staff – no. involved/ level of seniority
- Written policy in place vs. inherited/embedded processes vs ad hoc approach
- Policies for minimising waste versus policies for disposing of waste

- What types of waste do you have, and how much do you have of each?

PROBE:

Particular issues relating to each type of waste

Categorisation of waste into different types (biodegradable/toxic/etc)

SHOWCARD A

- Paper
- Cardboard
- Glass
- Plastic
- Electronic items
- PC consumables, e.g. printer ink cartridges
- Furniture
- PCs/printers
- Food waste
- Other (SPECIFY)

- Can you estimate your annual spend disposing of this waste?
- What processes do you have in place for minimising waste in your business?

PROBE:

Reduce packaging

Specify to suppliers need for minimum packaging

Recycle packaging/items

- Use of commercial waste recycling services

PROBE:

Pros and cons

C. WASTE MANAGEMENT: BEHAVIOUR/ PERCEPTIONS/ BARRIERS

- Thinking quite generally, whose responsibility is waste? Your business, your suppliers, the local council, central government, society as a whole?
 - What has influenced your attitude to waste?

PROBE:

- Cost of waste management
 - Need for storage of waste
 - Need for staff training on waste
 - Complexity of waste sorting
 - Attitude of your local authority to waste collection
 - Attitude of suppliers
 - Attitude of customers NB **clarify** whether customer-led preference or obligatory specification (ie supply chain pressure on them) vs perception that customers would like it
 - Environmental issues PROBE: What - landfill, sustainability, etc?
 - The media
-
- Do you make your customers/etc aware that you are waste conscious?
 - IF YES: What benefits do you get from this?

IF HAVE WASTE MANAGEMENT POLICY OF ANY SORT:

- Whether established in the business/accepted practice now?
- Does your policy include the purchase of waste minimisation goods?
 - If yes: Does it make a difference having a formal policy on this? *(NB any examples we can collect from respondents?)*
 - If no: Why does your policy not cover this aspect?

ASK ALL

- I'd like to explore some other issues behind attitudes to waste management/ minimisation. To what extent do the following impact on the ease with which your business deals with waste:
 - Lack of awareness of waste management procedures
 - General lack of awareness of where to start/Lack of help/advice to show way
 - Simply not on radar – others issues to worry about/not a business driver
 - Lack of real business benefit in changing – risk averse
 - More red tape: external push rather than internal need
 - Resistant to sustainability & environmental action/hyped topic
- Of all the issues we have discussed that affect you attitude to waste management, which are the most influential?
- What are the top 3 barriers?

D. CHANGING BEHAVIOUR

- Imagine an **ideal** service to support SMEs in waste management issues, what service would it offer a company such as yours?

PROBE:

- Who/what would it involve?
 - What would be offered?
 - How would you access help?
 - How else would it support your business/the London SME community?
-
- In contrast, what would put you off/act as a barrier to waste management?

PROBE:

What would you *not* like to happen?

If resistant to possibility of more effective/efficient waste management:

- What would help you change your view? (*Re-explore list of barriers on page 3 – if necessary*)

What evidence would help you to change your views on this?

PROBE:

- Would case histories help? By size/by sector?
- Is there anything that would help to tip the balance in favour of ?

ASK ALL

- Is there a need for incentives and/or Government regulatory pressure to ensure your company/SMEs take action?

PROBE:

“Carrots”

- financial bonuses
- status e.g. badge/kite mark/logo/certificates
- active support of local waste management networks/clusters of businesses

“Sticks”

- pressure – annual monitoring, rules and regulations
 - penalties of some kind - e.g. contribution to landfill tax (either directly or indirectly through higher taxes)

- Are there any local business groups or business initiatives around to deal with waste issues? Such as removing street clutter/waste, etc.
- What other possible actions could be taken to help build up level of activity?

PROBE:

- Specify to your suppliers that they must reduce their packaging (i.e. your business can create supply chain pressure)
- Specify that your suppliers must take back packaging

- If I were to tell you that London boroughs collect 1 million tons of non-municipal, non-household waste (which is one quarter of all commercial waste) and recycles just 6% of it (compared to around 40% in the rest of the country), what impact does that have on your opinion?

PROBE:

Changed your views on waste management?

- Waste provides an opportunity to create local renewable energy schemes which would create jobs and reduce carbon emissions. Would this type of initiative encourage action on your part?
- Do any of the following help convince you of the benefits waste management can bring to your business:

SHOWCARD B

- Help build your image and reputation by demonstrating responsible business practices
- Differentiate your business and help to gain a competitive edge, even gain new business
- Can be cost-neutral
- Increase staff morale by helping to contribute to London's environment and economy
- Help your business comply with current and future waste management regulations & guidelines

E. ADVICE AND SUPPORT STRUCTURE

- Which types of organisations/bodies does your company use for business advice and information in general?
- Would you also turn to them for advice on waste management?

PROBE:

Expect actual help, or signposting on to other bodies (e.g. via a link on their website)?

- What sort of advice and assistance would you be looking for?

PROBE:

- Basic needs – info/advice/support, checklists of what to do/processes
- Waste management company contacts, searchable supplier directory
- On-going support, i.e. “hand-holding” on waste management [*check how expect to be delivered: face to face vs electronic equivalent*]
- Who/what has the credibility to advise/encourage you on this?

PROMPT:

- Your local council
- London Development Agency
- Central Govt
- Trade associations – sector specific, CBI, Federation of Small Businesses
- Business advisers: Business In The Community, etc
- Are you aware of any existing sources of help for London businesses regarding waste management?

PROBE:

- Experience & helpfulness
- How expect to hear about them?
- Response to single portal to access all the agencies - LESS

SHOWCARD C:

- London First
- London Remade
- Envirowise,
- Business in the Environment
- Environmental Business Excellence Challenge
- WRAP
- Waste Watch
- North London Waste Authority
- Western Riverside Waste Authority
- West London Waste Authority
- Carbon Trust
- Environment Agency
- Chartered Institute of Waste Management

F. SUMMARY

- If there was one thing where the GLA should focus its efforts in trying to get more and more SMEs to have a waste management policy, what should that be?
- How could the GLA set the benchmark for other cities to follow in the UK or the world relating to waste management and reduction issues?
- Finally, imagine it is this time next year – 12 months from now – and the GLA has won an award for being the best authority for supporting SMEs in waste management. A reporter has asked them 'how did they do it?' What would they say has taken place?

THANK AND CLOSE