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# Post Implementation Review of the Single Use Carrier Bag Charge in Wales: Emerging Findings Report

## Research Summary

The Single Use Carrier Bag (SUCB) Charge (Wales) Regulations 2010 introduced a charge of a minimum of 5 pence for each SUCB, at the point of sale, both in store and for distance selling methods from October 2011.

This bulletin presents emerging findings from a post implementation review of the SUCB charge.

In order to inform future developments relating to the charge in Wales, the study examines the impact of the charge on consumers, businesses and the environment, and the impact of the voluntary agreement with retailers to donate the net proceeds to good causes.

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## Key Points:

For the period October 2011 to October 2014; the following points have emerged:

- The review estimates that SUCB use has declined by 71%.
- A rise in the use of “bags for life” and other re-useable bags has meant an overall reduction in **all bags** of 57%.
- Consumer support for the charge increased from under two thirds (61%) reported prior to the introduction of the charge in 2011, to just under three quarters (74%) in 2014
- Among retailers who charged for their bags, the majority reported that the SUCB charge had made either a positive or neutral impact on their business (87%) compared with 13% who thought it had made a negative impact.
- The net benefit of the SUCB charge was between £28 million and £32 million.
- Through the implementation of the 5p charge for SUCBs, additional donations to good causes have been estimated at between £17 million and £22 million.
- As a result of the donations to good causes, it has been estimated that social benefits of between £27 million and £35 million have accrued through environmental, health and employment benefits.

## Background

Wales was the first country in the UK to introduce a Single Use Carrier Bag (SUCB) Charge in order to reduce consumption and the associated environmental impacts. The SUCB Charge (Wales) Regulations 2010 introduced a charge of a minimum of 5 pence for each SUCB, at the point of sale, both in store and for distance selling methods, from October 2011.

## Aims and objectives of study

The overall aim of this project was to conduct a post-implementation review of the SUCB charge. Within this broad aim, the project objectives were to assess:

- The impact the charge has had on the use of SUCBs and the associated behaviour of consumers in Wales;
- The impact the charge has had on businesses in Wales;
- The extent to which the voluntary agreement with retailers has succeeded in encouraging the donation of the net proceeds of the charge to good causes;
- The extent to which the charge has reduced littering of SUCBs;
- The economic benefits of the charge.

## Methods

The Study comprised:

- a literature review;
- a telephone survey of 1,011 consumers;
- a telephone survey of 504 retailers;
- a focus group plus individual semi-structured telephone discussions with retailers; and
- semi-structured discussions with manufacturers and distributors.

The study was undertaken between July 2014 and April 2015.

## Detailed Findings

### Retailers

Among retailers who charged for their bags, the majority reported that the SUCB charge had either a positive or neutral impact on their business (87%) compared with 13% who thought it had a negative impact. Just

under three quarters of retailers who charge for bags (74%) agreed with the statement: 'we are happy to see the charge continue as it is', a further 14% agreed that '*we are happy for the charge to continue, but we would like to see some changes*', while fewer than 10% agreed that 'we would like to see the charge removed'.

The feedback about the SUCB charge received via the retailer focus group was also generally positive, with many retailers reporting that business costs had reduced as a result of the charge because fewer bags were being purchased.

Retailers also reported spending relatively little time administering the charge during the previous year. Over half (58%) of retailers reported that they had spent no additional time administering the charge over the previous year, while just over a quarter (27%) reported spending one day or less; 5% of retailers reported spending more than one day on SUCB administration.

Respondents to the retailer survey were asked to estimate the cost of the charge to their business. The findings suggest that the total administrative cost of the SUCB charge to retailers across Wales was less than £180,000 per year.

### Consumers

Consumers were asked whether they supported or opposed the charge. The majority of consumers were supportive of the charge. Consumer support for the charge had increased from under two thirds (61%) reported prior to the introduction of the charge in 2011, to just less than three quarters (74%) in 2014.

Consumer support for the charge is also demonstrated by the fact that 42% reported taking fewer SUCBs than before the charge was introduced and over one third of consumers (35%) reporting that they had stopped taking SUCBs altogether.

The review found that SUCB use varied by the type of shopping, with SUCB use being

higher for consumers' most recent takeaway purchase (78%) when compared with their most recent non-food shop (36%), their most recent 'top-up' food shop (29%) and their most recent regular supermarket food shop (17%).

## Manufacturers and Distributors

Retailers were asked who supplied their SUCBs. Five of the top ten suppliers of SUCBs identified as part of the retailer survey were interviewed for feedback on the impact of the charge. Manufacturer feedback suggested that smaller suppliers experienced a negative impact on their business, with reports of a decline in overall sales.

## Good Causes

There is no statutory duty on retailers to donate the money from SUCBs to good causes, but this forms part of a voluntary agreement developed by Welsh Government that retailers can sign up to. This voluntary agreement sets out the following principles:

- The net proceeds are donated to good causes, which where possible, will benefit Wales.
- The net proceeds will provide additional support to good causes over and above any existing arrangements.
- Where retailers have more than 10 full-time employees, a copy of or a link to their record will be provided to the Welsh Government when published for monitoring purposes.
- Where retailers have less than 10 full-time employees, a statement will be made including the name of the good cause(s) to which the money has been donated.

Of the retailers who charged for SUCBs, 78% reported that they donated all of the net proceeds; a further 9% reported that they donated a proportion of the net proceeds and 6% of respondents said they didn't know what proportion was donated to good causes. Less than 1 in 10 retailers reported that they did not donate the net proceeds and 1% refused to answer the question.

The findings of the consumer survey suggest that there was some confusion with regards to the SUCB charge and the use of the funds generated. Half of consumers questioned (50%) thought that retailers donated the money from the charge to good causes, while over one third 36% said that they didn't know what happened to the charge; the remaining respondents reported that the charge was paid to the Welsh Government (7%), that retailers kept the charge themselves (6%), that it was paid to the local authority (2%) or gave a variety of other explanations (2%).

## Litter

This study used both consumer and retailer surveys to assess the impact of the charge on litter. The majority of retailers reported no change to the amount of litter 'around their premises' (78%). However, when asked about the extent to which they agreed with a set of attitudinal statements, Over half (59%) of retailers agreed that 'the charge has helped to reduce litter' and two thirds (66%) of consumers agreed with the statement 'the charge has helped to reduce littering in my local authority area'.

The disparity between these two findings may reflect the difference in the wording of the two questions put to retailers, with the former being limited to their own premises and the latter potentially interpreted as relating to a wider area.

## SUCB Use

This review estimates that SUCB usage has declined by 71% in the charge time frame (2011 to 2014).

However, work undertaken by the Waste and Resources Action Programme (WRAP) for supermarkets in Wales shows that there is a 78% decline in SUCB usage. The difference between the two surveys reflects the inclusion of non-supermarket retailers in this review.

A rise in the purchase and use of "bags for life" and other re-useable bags across the

same time scale has meant an overall reduction in **all bags** of 57%.

## Next steps / Future publications

This bulletin presents emerging findings from the review. It is envisaged that the full evaluation report will be published on the Welsh Government website in Autumn 2015.

**Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government**

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