



MARKET RESEARCH

CAMPAIGN PLANNING RESEARCH TO ENSURE THE CARU CYMRU KEEP WALES
TIDY FLY-TIPPING CAMPAIGNS LAND WITH IMPACT

RESEARCH REPORT BY MIND FIELD RESEARCH
APRIL 2022

Coming up

- Background to the research
- Lifestyle
- Attitudes and perceptions
- Creative testing
- Next steps

Background to the research



Keep Wales Tidy are working on developing a national campaign to tackle fly-tipping, with a particular focus on HMO student households and social housing tenants. It is recognised that fly-tipping is a problem with multiple occupancy households, especially where waste provision is shared. Research is needed to understand the best route to changing waste disposal behaviours for the positive.

INSIGHT OVERVIEW

Students in Wales have a good understanding of general waste management, with most keeping up with basic recycling and taking measures not to actively litter or fly-tip. Those living in rural and coastal towns are more proactive in good waste management than those living in urban areas.

Work is needed to educate students on what aspects of their behaviour is fly-tipping. Understanding of the different types of fly-tipping low, with most students describing it as: '*Sofas and fridges dumped by car at the side of the road*'.

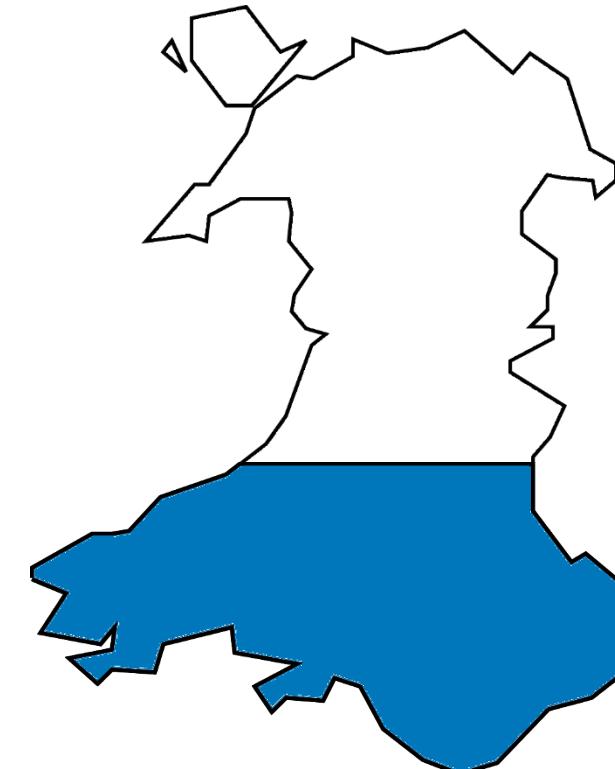
Ads that both inform and have a strong deterrent work best, but there needs to be an understanding that students try their best with the resources they have available. Different messages and tones are needed for different areas of Wales.

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LIFESTYLE

WHERE STUDENTS HAVE DECIDED TO STUDY HAS AN IMPACT ON WASTE MANAGEMENT BEHAVIOURS

Those more interested in being connected to the environment place higher importance in waste management and recycling.

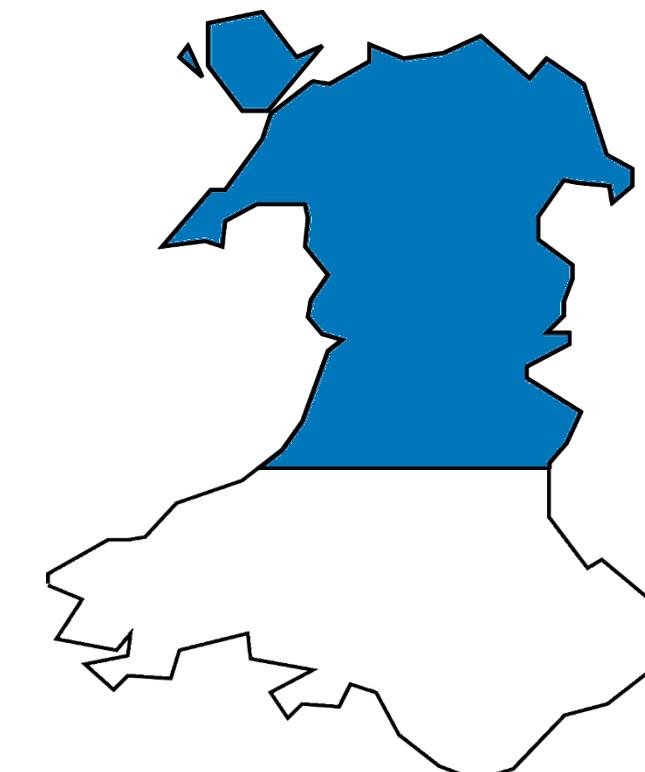


Cardiff Students

- Don't want to be too far away from home, but just far enough to be independent
- Have visited Cardiff before and like the nightlife
- Like the feeling of living in a city without it being too big
- Plan to stay only to study and are likely to move on after graduating

Bangor & Aberystwyth Students

- Love nature, the outdoors and being close to the coast
- Passionate about the environment and like to reflect this in the area they live
- Consciously decided to live there as they are likely to stay living in the area after university and like the feeling of community



MORE TIME SPENT AT HOME HAS LED TO STUDENTS BEING MORE ORGANISED WITH THEIR WASTE



Due to the increased workload of final year, 3rd year students spend more time together in communal areas of their home in comparison to their 1st and 2nd years spent in clubs and student unions.

The increased time spent at home involves cooking meals together, ordering takeaways, watching series on Netflix and the odd house party in between deadlines.



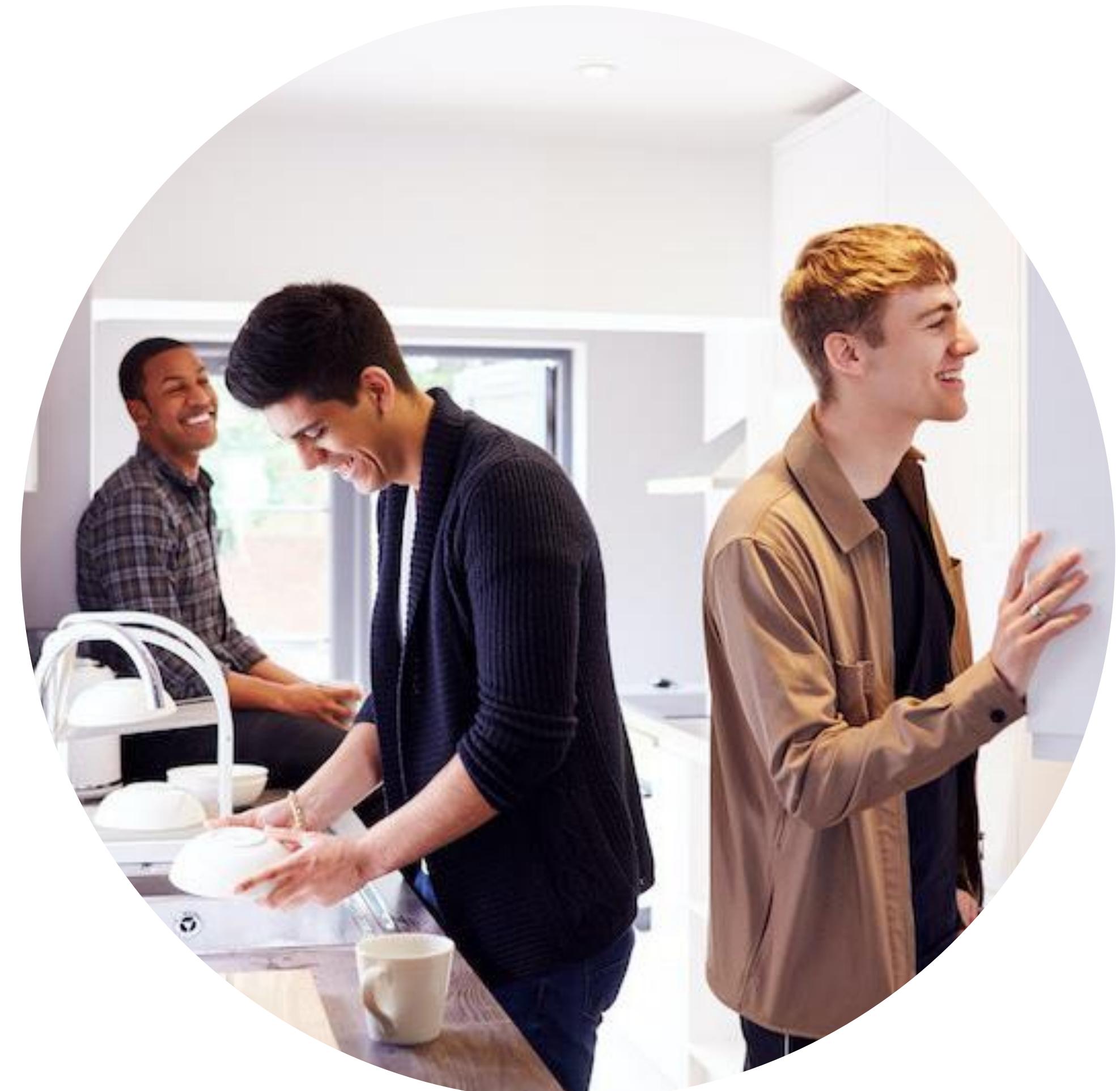
The more time spent together and collaborative effort in the kitchen, compared to year 1 and 2, has seen the house become more organised and led to an overall reduction in waste.

STUDENTS DON'T ORGANISE CLEANING AND WASTE REMOVAL BY ROTA BUT ONE OR TWO PEOPLE USUALLY TAKE CHARGE

Most of the time cleaning and waste removal is dealt with off the cuff and as they go. Waste is organised as students are cooking and cleaning, and is removed once they've finished up. Some have tried dividing cleaning up by rota but find it hard to maintain for any length of time.

However, there does tend to be one or two in the house that are most knowledgeable and take charge. This is in terms of what can be recycled, which bin goes out which week, and taking the bins outside ready to be collected. These are usually the members of the house who are most keen on environmental issues.

“ I don't know why but I've become the guru of recycling in this house! They're always asking me 'What bin does this go in again Rhi?!’ ”



KITCHEN DIARIES IN ACTION

KITCHEN ACTIVITY DIARY – PLEASE COMPLETE EVERY DAY FOR 1 WEEK						
Write Name Below	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Celine
Jess
Rachel
Fiona
Continued...

“ Came home and sat in the kitchen with Ffion, she made us 2 x cups of tea and we watched tele. We put everything in the dishwasher ”

-Emma

KITCHEN ACTIVITY DIARY – PLEASE COMPLETE EVERY DAY FOR 1 WEEK						
Write Name Below	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Josiah	-washing up -vacuumed -omelette and koot -Sandwich	-made tortellini pasta -tidied up the living area	-recycling -compost -Fluid ice -boiled chicken -blended hobs -cleaned up oven -spitfire -cleaned surfaces	-ate dinner chicken and veg -put dishes away -ate dinner chicken and veg -ate dinner chicken and veg -ate dinner chicken and veg	-ate dinner chicken and veg -ate dinner chicken and veg -ate dinner chicken and veg -ate dinner chicken and veg	-ate dinner chicken and veg -ate dinner chicken and veg -ate dinner chicken and veg -ate dinner chicken and veg
Tayyeb	Put away washed dishes Washed everything in sink Sieve and cleaned Change bin Take out recycling	Washed everything in sink Sieve and cleaned Change bin Wash down surfaces Take out recycling	Spaghetti and tomato sauce + blog chicken Washed dishes	Sweet/reclaimed surfaces Washed up	Spaghetti and tomato sauce + blog chicken Washed up	Eggs + ham sandwich
Alfred	Put away big bag in bin Tidy bathroom Clean dishware Wash tea kettle Canned beans for meal prep Please get onions, rice, greens	Food prep for library Food prep for library Food prep for library Food prep for library Food prep for library	Organic vegetables Fried onions, rice, water Shopped Linen in real prep Dishwasher	Washed up	Washed up	Washed up
Jody	Loaded dishwasher Unloaded dishwasher	Banana, pek + choc pancakes -Washed onions, pek + chocolate waffles -Washed onions, pek + chocolate waffles	Food, rice, vegetables Unloaded dishwasher	Food, rice, vegetables Unloaded dishwasher	Washed up	Washed up
Filsan	-WASHED UP DISHES	-WASHED UP BIKES	-WASHED DISHES	-WASHED UP DISHES	-WASHED UP DISHES	-WASHED UP DISHES

“ Afternoon – separated the recycling out from my bathroom bin and cleaned around the oven - Ben ”

KITCHEN ACTIVITY DIARY – PLEASE COMPLETE EVERY DAY FOR 1 WEEK						
Write Name Below	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
LIV	-MADE COFFEE & BREAKFAST UNLOADED DISHWASHER MADE LUNCH	-MADE COFFEE & BREAKFAST UNLOADED DISHWASHER MADE LUNCH	-MADE COFFEE & BREAKFAST UNLOADED DISHWASHER MADE LUNCH	-MADE COFFEE & BREAKFAST UNLOADED DISHWASHER MADE LUNCH	-MADE COFFEE & BREAKFAST UNLOADED DISHWASHER MADE LUNCH	-MADE COFFEE & BREAKFAST UNLOADED DISHWASHER MADE LUNCH
Rhi	-Put away clean dishes Made dinner	-Put away clean dishes Made dinner	-Put away clean dishes Made dinner	-Put away clean dishes Made dinner	-Put away clean dishes Made dinner	-Put away clean dishes Made dinner
Alaw	-CAME IN TO WASH HANDS AFTER TAKING BINS OUT -PUT CLEAN DISHES AWAY ★ BEEN OUT ALL DAY, SO DIDN'T MAKE ANY FOOD AT TOOK MOST OF THE BINS OUT	-WALKED IN FOR A CHAT WITH LIV -WASHTED HANDS AFTER COMING HOME FROM WORK -WALKED IN TO DO WORK -CHANGE OF SCENERY	-CAME IN TO HAVE A CHAT WITH LIV -WASHTED HANDS AFTER COMING HOME FROM WORK -WALKED IN TO DO WORK -CHANGE OF SCENERY	-CAME IN TO HAVE A CHAT WITH LIV -WASHTED HANDS AFTER COMING HOME FROM WORK -WALKED IN TO DO WORK -CHANGE OF SCENERY	-GLASS OF WATER -CHAS -GLASS OF WATER	-GLASS OF WATER -MADE DINNER -BAGELS AGAIN, -UNLOADED DISHWASHER AND WASHED IT ON -MADE TOAST

KITCHEN ACTIVITY DIARY – PLEASE COMPLETE EVERY DAY FOR 1 WEEK						
Write Name Below	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Emma Green
Jessica Cotton
Ffion Dain
Ethan Southgate

KITCHEN ACTIVITY DIARY – PLEASE COMPLETE EVERY DAY FOR 1 WEEK						
Write Name Below	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Ben E	Washing up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.				
Ben A	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.
Ben-T	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.	Washed up after breakfast, made omelette and washed up after lunch.

“ 5:30 - Made a cuppa and breakfast. Left stuff by the side to wash up later. 21:30 - washed up breakfast stuff and popped the food recycling, general waste and plastic all in the bins ”

-Monica

KITCHEN ACTIVITY DIARY – PLEASE COMPLETE EVERY DAY FOR 1 WEEK						
Write Name Below	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Monica
Ffion
Charlotte
Phoebe

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ATTITUDE AND PERCEPTIONS

STUDENTS ARE MOTIVATED TO MANAGE WASTE, BUT NEED MORE INFORMATION AND FACILITIES

MOTIVATION

- Students generally care about the environment and wildlife which leads them to believing in the need to correctly recycle waste
- They want to do the right thing and not make more work for refuse collectors by getting it wrong
- They can't afford the fines associated with fly-tipping

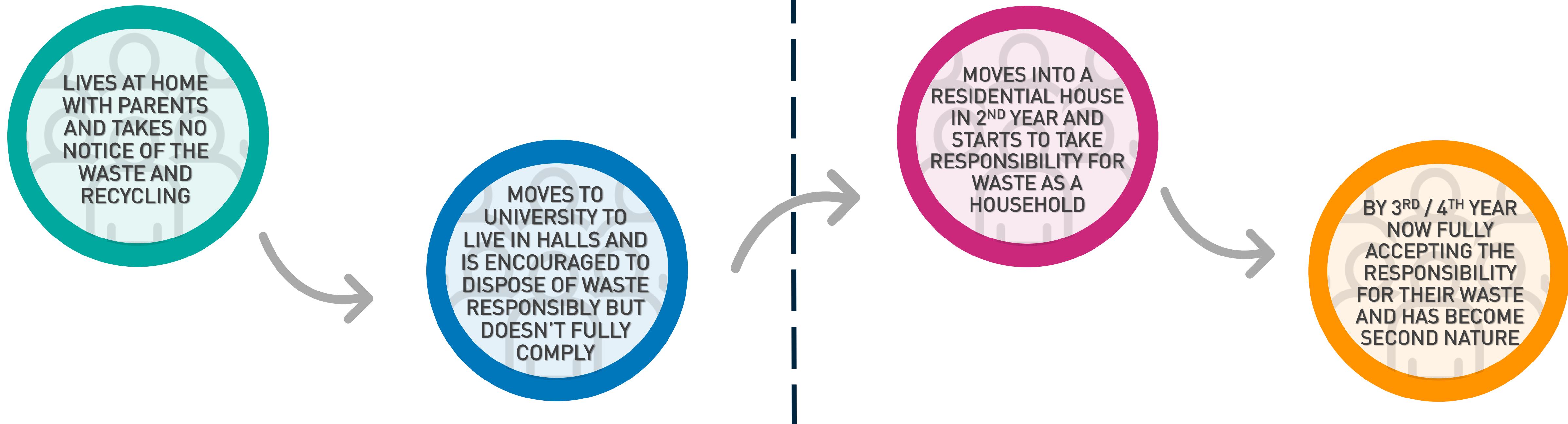
CAPABILITY

- More education is needed on the different types of fly-tipping and what the right behaviours are to carry out
- They want to know what to do with bags that won't fit in the bin, as well as options for repairing and recycling items and removal of broken items

OPPORTUNITY

- Students feel there is not enough bin provision for the size of households
- They are often unclear as to what the landlord is able to do for them in terms of getting rid of large items
- Many students in Wales have access to a car to take items to the recycling centre

THERE ARE TOUCH POINTS FOR KEEP WALES TIDY IN A STUDENT'S UNIVERSITY JOURNEY WHERE MESSAGING WILL WORK HARDEST



The opportunity for Keep Wales Tidy is to get to students when they enter their second year of university. This is the time when they start to take responsibility as a household for their waste, recycling and other household duties. This is where messaging will work hardest because they are becoming aware of their duty.

STUDENTS HAVE LITTLE UNDERSTANDING OF WHAT CLASSES AS FLY-TIPPING

Fly-tipping is largely thought to be specific to the act of driving large bulky items to the countryside and leaving them by the side of the road.

Due to low awareness of the different severities, it leaves students unaware that they are subject to fly-tipping themselves.

The lack of bin provision is the main barrier to good waste management and they are forced to place items next to their bins, or in other people's bins, and often put broken furniture outside with a "FREE" sign attached.

This can be problematic in coastal areas of Wales where there are seagulls! In city centres such as Cardiff, this is also problematic as the streets can become very messy with rubbish, making it an unpleasant environment to live in at times.



“ When I see these pictures it just makes me think of Cathays! ”

STUDENTS DON'T UNDERSTAND EXACTLY WHAT ANTI-LITTERING, WASTE & WASTE MANAGEMENT MEAN

ANTI-LITTERING

Anti-littering is thought to be the act of taking your waste with you when you are out and about. Littering is described as times when students leave their take-away cartons, drinks bottles and cans at the park, in the town centre or anywhere that it's not placed in a bin.

In general, students don't actively litter themselves, but they are aware of it regularly happening in the area – especially on a night when everyone has had a drink!

WASTE

On hearing the word 'waste' most think of food waste – both in terms of what restaurants and grocers produce and the food that individual households throw out.

Most student households have a food waste bin on their counter, but it often gets forgotten about and causes hygiene problems. This results in it not being used at all and the food waste being put in the general waste bin.

WASTE MANAGEMENT

Waste management is connected with the council and what they provide in order to ensure that waste is dealt with correctly – tips, recycling centres, bin provision, bin and recycling collection, street cleaners.

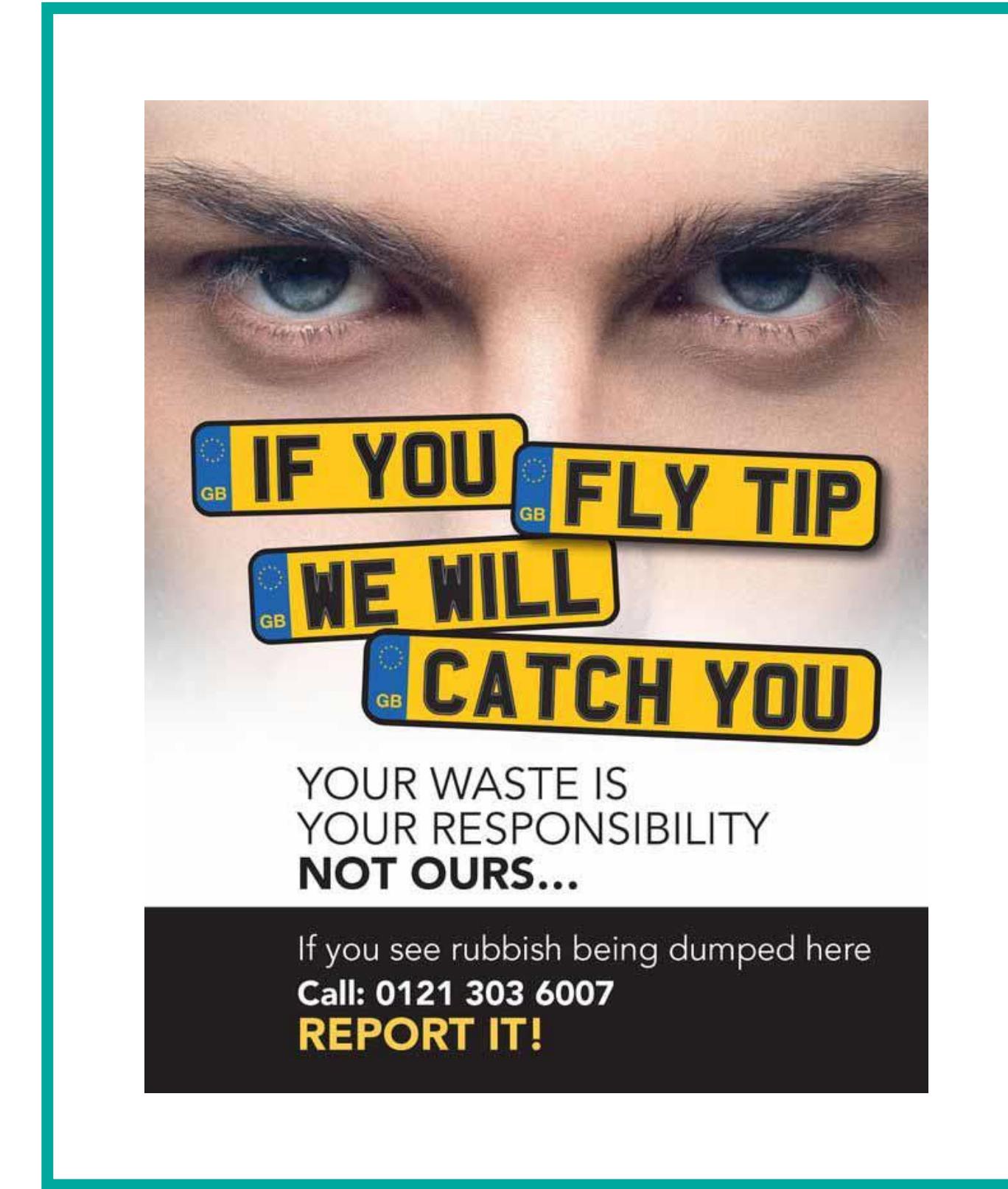
Students generally understand their role in waste management to be doing everything as properly as they can in terms of the bins they have, making it easier for the council to do their job.

It is important for Keep Wales Tidy to consider the understanding of the different terms to different audiences. The creative copy and images must overcome this obstacle to understanding by forging a link between respective terminology and actual meaning.

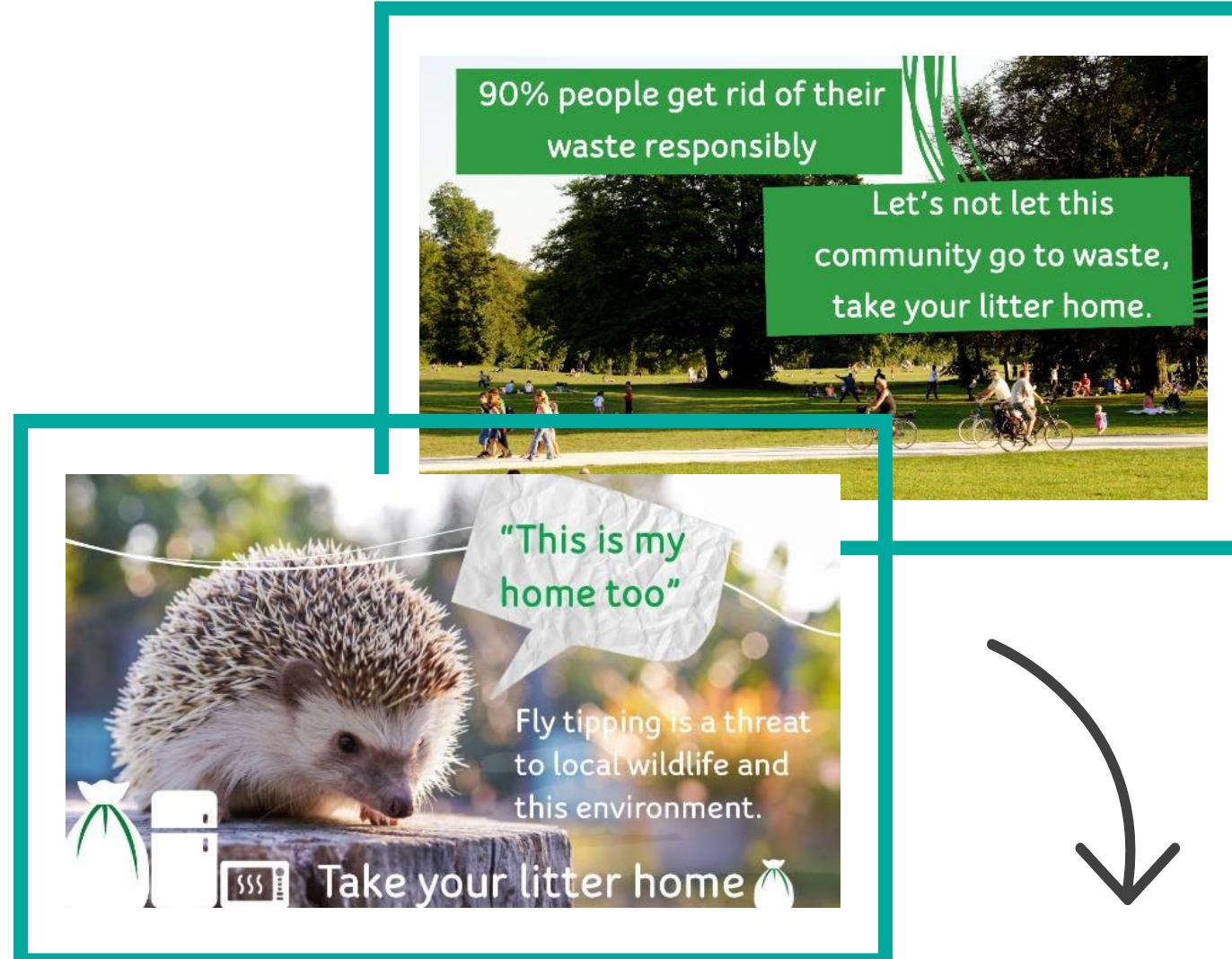
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CREATIVE

MESSAGES THAT EDUCATE, CAUSE SHOCK AND HAS A CLEAR CALL TO ACTION WORK BEST FOR STUDENTS



"HOW WOULD THESE MESSAGES MAKE YOU FEEL IF YOU SAW THEM IN YOUR AREA?"



Students in Cardiff are least likely to be impacted by these images as it's what they're used to seeing around Cathay.

Aberystwyth and Bangor student are more community-minded and like facts about their area.

The placement of Welsh and English language needs to be clearer. Non-Welsh speakers are put off because it's not clear the poster is in both languages.

The images of wildlife and parks work well for those interested in environmental issues.

It acts as a good reminder that their behaviour has an impact on wildlife in their area.

Some understand the image of the park as a reminder to "keep it looking like this" but for most it isn't clear and doesn't hit home hard enough.

The bath image works to shock and disgust however it distracts from the messaging.

Accusatory language doesn't work to encourage the right behaviour. Students feel judged and it doesn't recognise that they are trying their best. This angle is more likely to push them towards fly-tipping rather than against it.

Bright colours and graphics paired with clever messaging work well to increase capability through education and has good snappy call to action.

"HOW WOULD THESE MESSAGES MAKE YOU FEEL IF YOU SAW THEM IN YOUR AREA?"



"Keep ____ Clean" is locally relevant – especially for those in Aberystwyth and Bangor. It is positive and promotes positive behaviour change. However those in Cardiff didn't pick up on the local angle. The fine works best a good deterrent and has a clear call to action.

Facts and figures are good but the road sign fails to have impact. The number 14 seems insignificant and having a "since 2020" time stamp makes it lose its impact.

Careful not to be too similar to other branding and lose the message. Both are reminiscent of supermarket branding Asda and Morrisons.

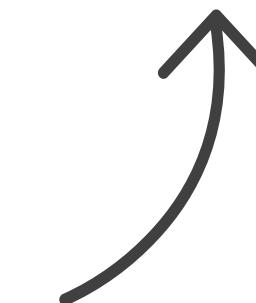


The eyes make you stop, think and read – especially if scrolling through social media. However the owl is seen as irrelevant.

These posters would work well in areas where fly-tipping is high as it makes you think "Who's watching? Are there cameras? Am I going to be caught here?"

The number plates are confusing with some making up their own interpretation of why they're there.

Directiveness works with a clear call to action and students would report if it was impacting them.

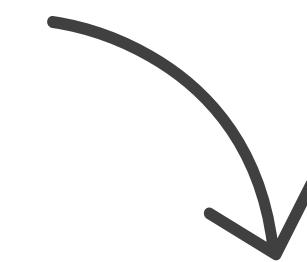


Both of these images and messages are irrelevant to students and are most likely to be ignored. There is no connection to their reference of fly-tipping and has no impact.

There is confusion as to why there is a cost to schools for fly-tipping and the link seems odd.

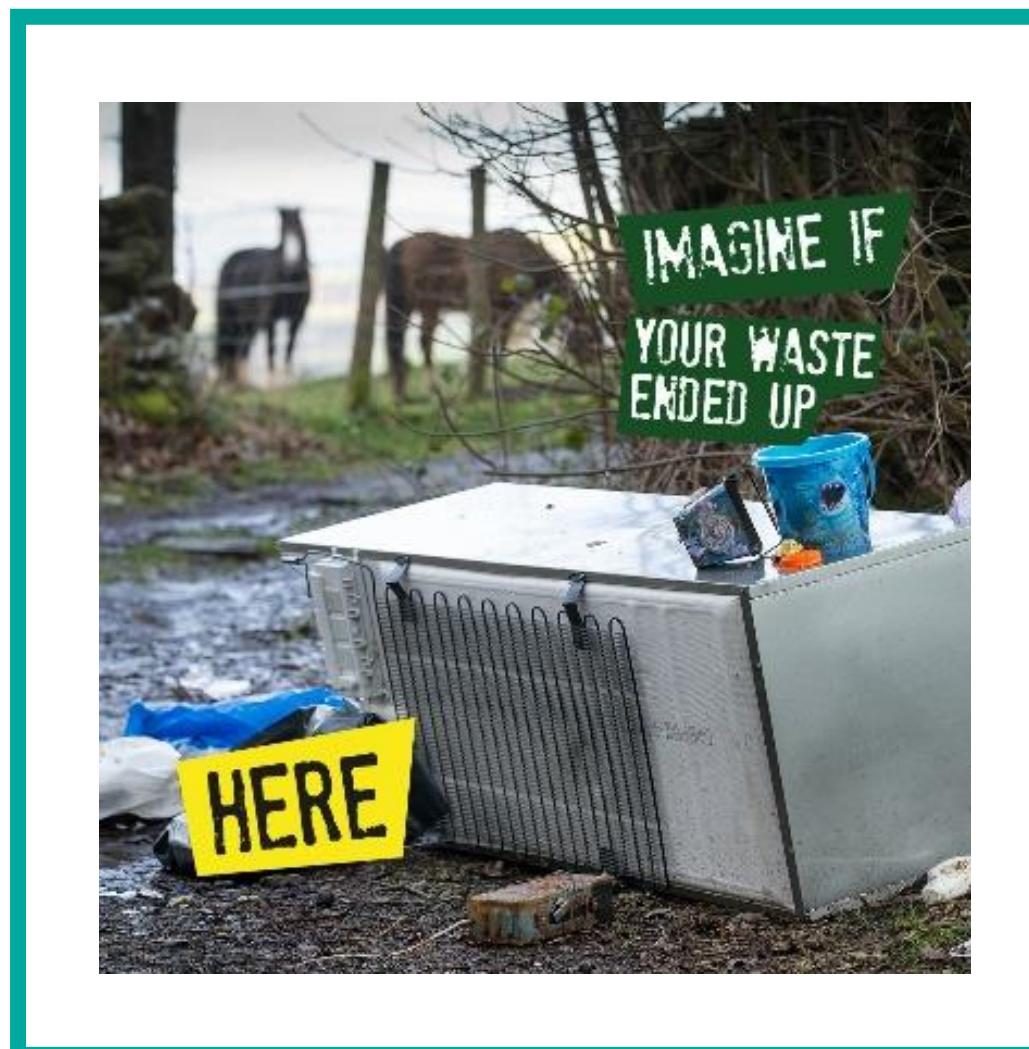
"WHAT KIND OF LITTER PROBLEM DOES THE WORDING IN THESE MESSAGES DESCRIBE TO YOU?"

This image had no impact as it wasn't educating and had no call to action



Images of overflowing bins and bin bags placed on the street is familiar to those living in Cardiff, so is not seen as a problem and therefore not a behaviour that needs to change.

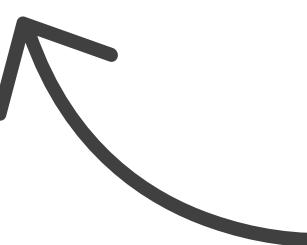
“That's what it looks like all the time round here. It's normal. I didn't know it was a problem”



The bin bags are at odds with the message – this isn't litter to students. This is what they class as 'overflow waste' and it is seen as the council's problem, not theirs.

Students do not like to be asked questions such as 'what is wrong with this view?' – it feels basic and like a school teacher lecture.

Dumped rubbish in a field is regarded as fly-tipping and not litter and therefore the messaging here is confusing.



These messages add further confusion and then fail to provide the information that is needed – i.e., the knowledge that recycling centre must be registered but no info on how to find one?



CREATIVE DEVELOPMENT GUIDELINES

Be direct with a clear call to action.

This is an opportunity to educate students on the impact of their behaviour. Clear, directive language is needed to do this to avoid further confusion.

There is little knowledge of the different types of fly-tipping. Ads that suggest overflow bags and littering are fly-tipping confuse students and turn them off the message.

Be careful not to fall short of successfully changing behaviour by failing to inform on the right behaviour or action. Be clear on what you want the audience to do, and give them the information they need to successfully carry it out.

Recognise the different needs of students across Wales.

Those living in Cardiff have a different experience of waste and community than those living in Aberystwyth and Bangor .

Cardiff students are more accepting of waste build up on the streets and are less concerned about the impact on the environment – messages in city areas should be more factual, direct and have a clear reason to change behaviour.

Those in Aberystwyth and Bangor have a deeper connection to the environment and tend to feel part of the community – educating on the impact to the environment and community works well.

Shock, educate but recognise that students are trying their best with the resources they have available.

Students are not purposefully and proactively fly-tipping, littering and keeping poor waste management habits.

This should be recognised in the messaging to further encourage engagement.

The best way to get students to keep up good habits and learn new positive waste management habits is to:

- Use images and messages that shock
- Educate on what the right behaviours are
 - Deter with a consequence

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NEXT STEPS

NEXT STEPS

Now we have a good understanding of the messages, tones and creative execution that will work for students, we will move onto the next stage of research:

Social housing tenants in Wales.

A final report and co-creation workshop will be developed after all fieldwork is complete.



KEEP IN TOUCH

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MIND FIELD

A dark, moody background featuring a person's profile in shadow. In the center, there is a bright, glowing yellow sphere, possibly representing the sun or a light source, surrounded by blue and white wispy clouds or smoke. The overall atmosphere is mysterious and futuristic.

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