

**CASE STUDY:**

# The sale and use of carrier bags in Wales

Wales was the first country in the UK to introduce a single use carrier bag (SUCB) charge in 2010. The aim behind the charge was to reduce consumption of SUCBs and the associated environmental impacts arising through production, use and disposal. Early evidence suggested this was working, but what are the current effects of the charge on the use of carrier bags in Wales by retailers and consumers? And are the efforts to reduce plastic SUCBs being undermined by significant increases in the number of plastic BfL being issued? The Welsh Government commissioned Winning Moves to provide insight into this.

**The challenge**

A Post-implementation Review (PIR), published in 2016, assessed the impact of the SUCB charge and indicated a reduction in the supply of SUCBs in Wales between 2011 to 2014. However, there has been growing concern from the Welsh Government and wider stakeholders, such as environmental groups, that low cost Bags for Life (BfL), which are an alternative to SUCBs are being discarded prematurely by consumers. Winning Moves conducted research to provide the Welsh Government with an update on bag usage in Wales, and an understanding of current retailer and consumer attitudes and behaviours in response to the SUCB charge.

**The approach**

Quantitative research was carried out to determine how many bags have been issued since the PIR was completed in 2015-16 and also to understand current retailer attitudes and behaviour relating to carrier bags. Fieldwork was conducted in 2019 to allow figures to be provided for the calendar year 2018, as well as for the financial years 2015-16, 2016-17, 2017-18 (1st April to 31st March). Steps were taken, during data collection and analysis, to allow data gathered to be compared with data gathered in the PIR, where possible.

Qualitative research was conducted with consumers to understand citizen attitudes and behaviour with regard to carrier bags. An online discussion board was used to gather information on individuals' approach to their use of shopping bags – from types of bags they have through to how and why they use them, and how they dispose of them.



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### The result

The study found the number of SUCBs issued by retailers in Wales decreased by 21% between 2015-16 and 2017-18. Winning Moves estimate that 94.1 million plastic SUCBs were issued, compared with 119.4 million in 2015-16. The decline was mostly the result of large supermarkets ceasing to issue plastic SUCBs. Although the majority of SMEs were positive about the charge and around one in eight (15.4%) of SMEs reported they were considering phasing SUCBs out, the overall number of plastic SUCBs issued by SMEs increased from 9.9 million in 2015-16 to 10.2 million in 2017-18.

Unfortunately, the number of plastic Bags for Life (BfL) issued over the same period was found to be increasing at a concerning rate. Robust comparisons were impossible due to a paucity of data, but it was clear from the available evidence that the number of plastic Bags for Life issued per annum was at least 40% higher in 2017-18 than in 2015, with an estimated 65.2 million plastic BfL being issued by the largest ten supermarkets in Wales in 2017-18.

Encouragingly, the qualitative research found that consumers are now in a routine of using reusable bags for their grocery shop, from both large supermarkets and smaller top up shops. However, it was also found that consumers are less likely to bring their own bag when doing other types of shopping, such as shopping for clothes.

Retailer attitudes towards the SUCB charge remain positive, with more than two thirds (68%) agreeing it should continue and relatively few disagreeing (7%). Similarly, most consumers who participated in the qualitative research were positive about the SUCB charge. Where consumers had concerns about the SUCB charge, this tended to be about whether the charge was high enough to disincentivise the purchase of new bags.

Winning Moves recommended that the SUCB charge should be continued, but that the Welsh Government should consider strategies to reduce the number of plastic BfL issued and increase consumer re-use of such bags where they are issued.

Winning Moves produced a comprehensive report on this research which can be found at: <https://gov.wales/research-sale-and-use-carrier-bags-wales>. This report also outlines the implications of the findings for the Welsh Government.

