

Going Full Circle

International consumer study on circularity in
consumer & home electronics

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A business of Marsh McLennan

CIRCULAR CONCEPTS ARE VERY IMPORTANT TO CONSUMERS

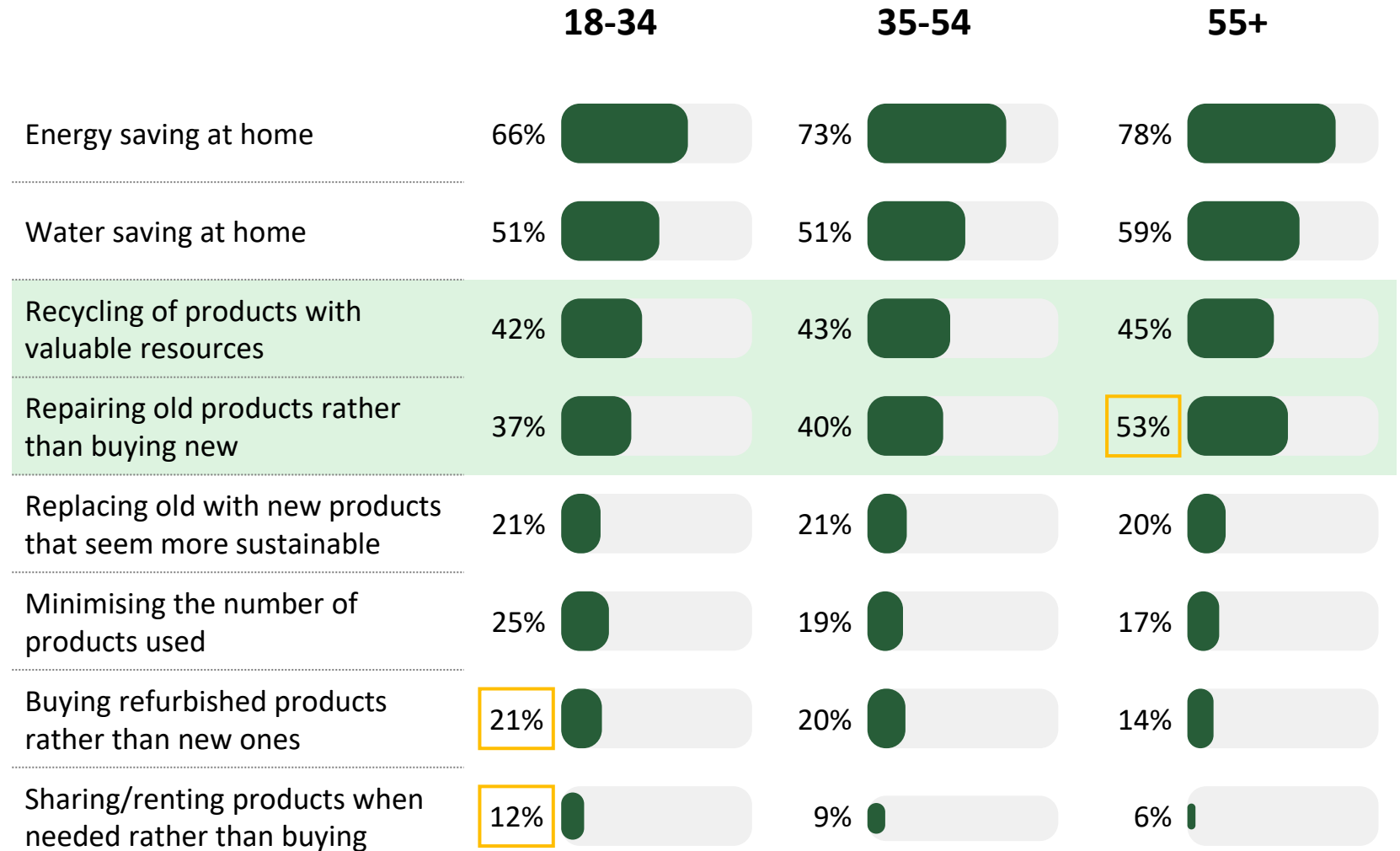
“My top 3 behaviors for personal sustainability include ...”



Source: Oliver Wyman Consumer Survey 2023, n=1,862

RECYCLING UNIVERSALLY IMPORTANT – REFURBISHED OR RENTAL MODELS ESP. FOR YOUNGER CONSUMERS

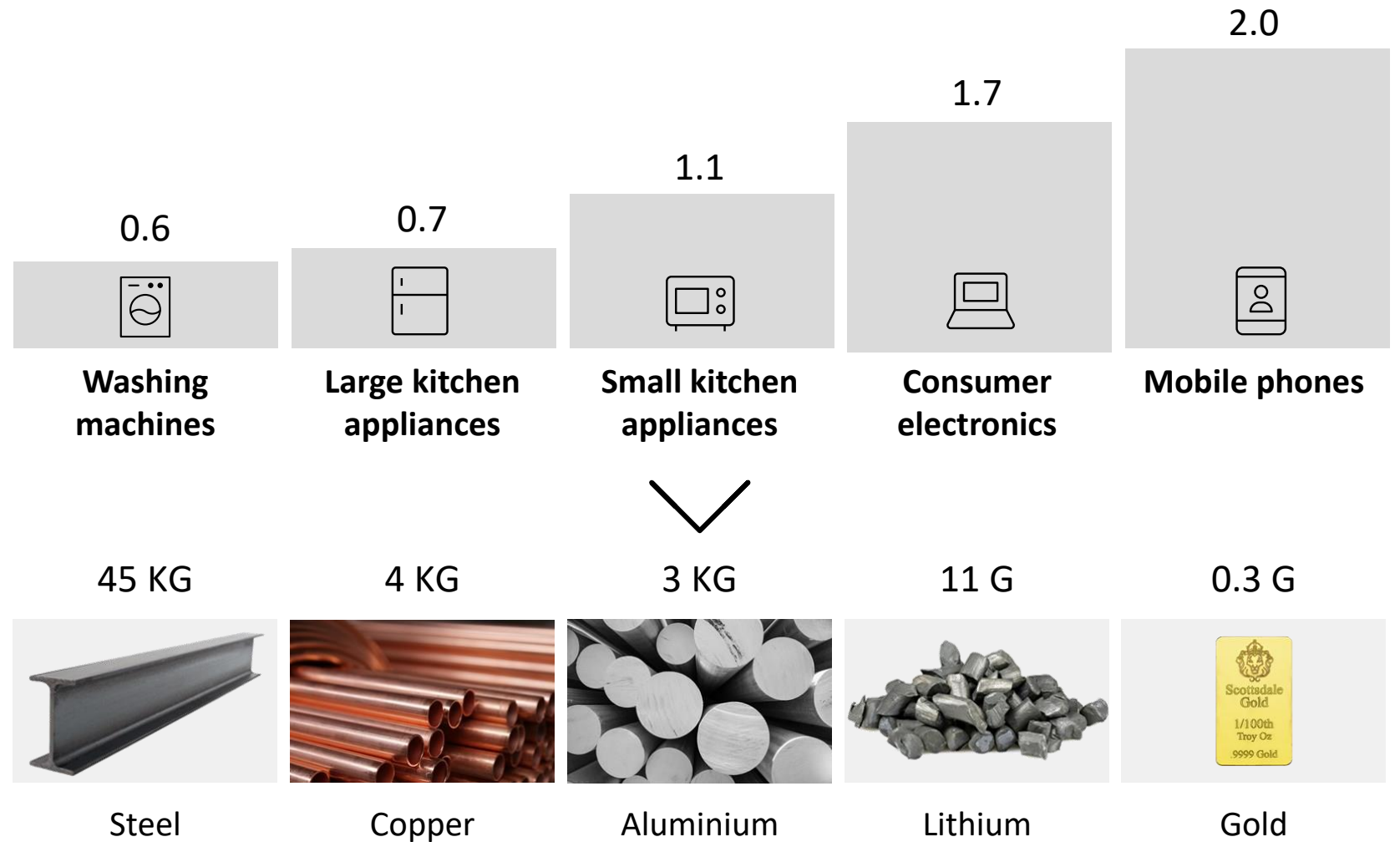
“My top 3 behaviors for personal sustainability include ...”



Source: Oliver Wyman Consumer Survey 2023, n=1,862

... AND A WEALTH OF RESOURCES ARE STORED UNUSED IN HOUSEHOLDS

"In my home there are x unused or broken ..."

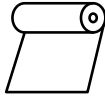


Plus: rare earth minerals, such as Neodymium, Cerium, Yttrium and more ...

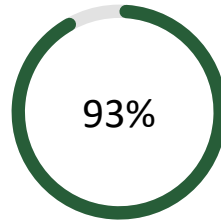
ONE KEY REASON: LIMITED KNOWLEDGE EXISTS ON HOW TO RECYCLE E-WASTE

Respondents across the board know much better how to recycle materials compared to e-waste

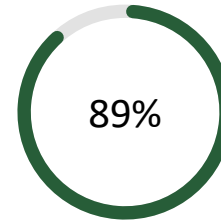
“I know how to properly recycle ...”



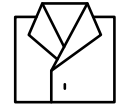
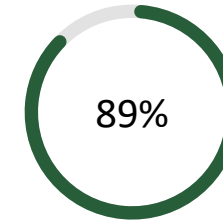
Paper



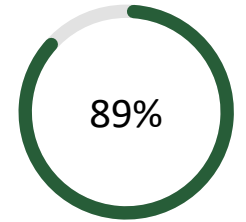
Glass



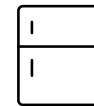
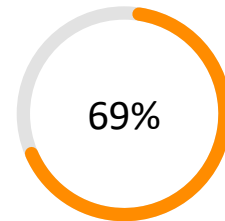
Plastic



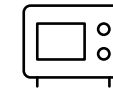
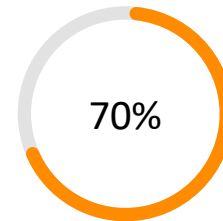
Clothes



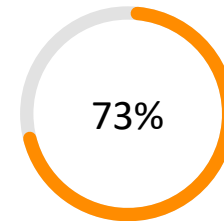
Washing machines



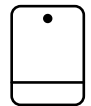
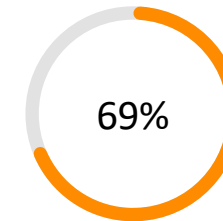
Large kitchen appliances



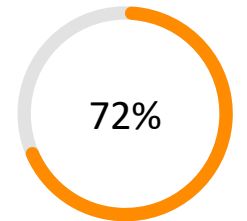
Small kitchen appliances



Consumer electronics



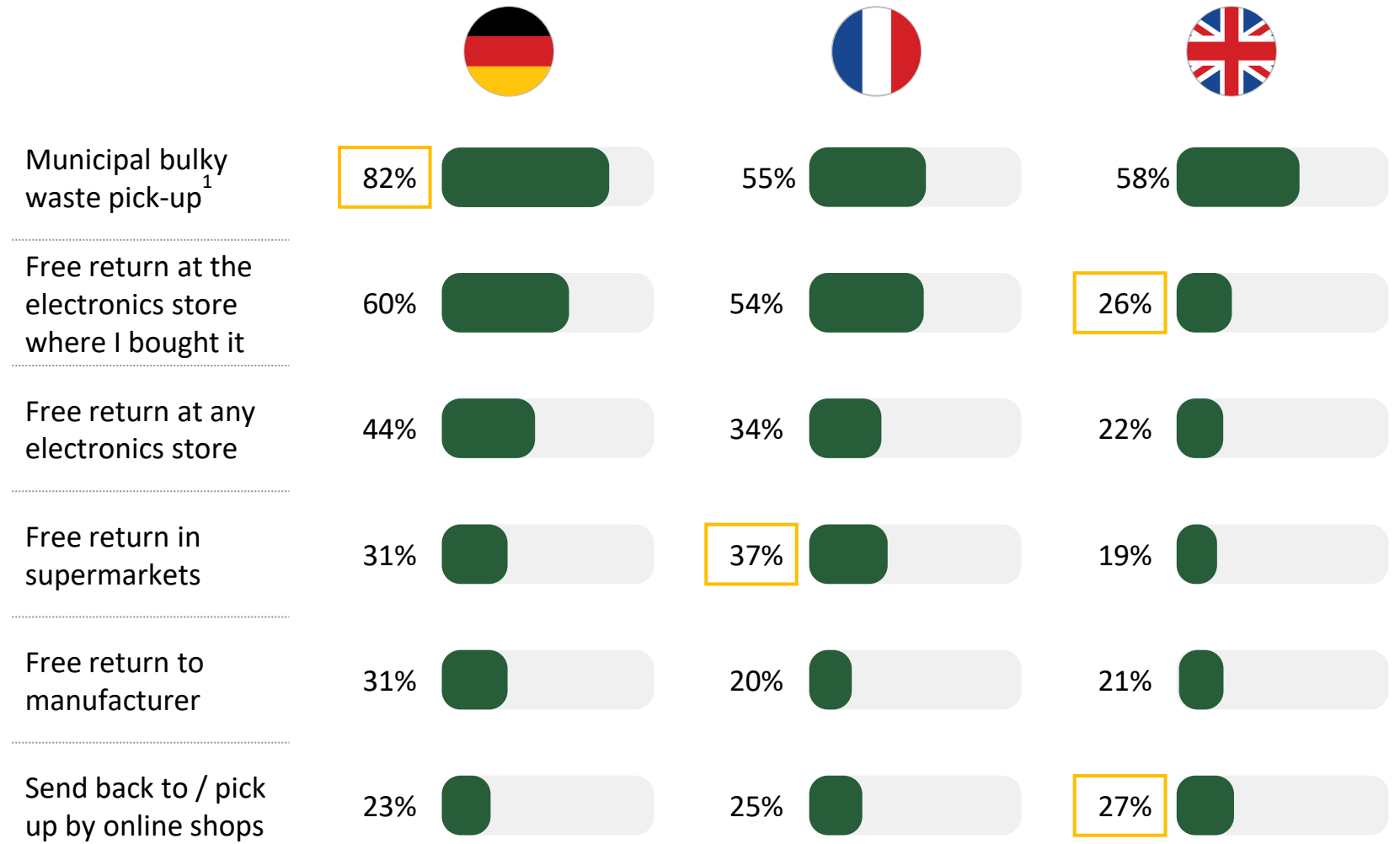
Mobile phones



Source: Oliver Wyman Consumer Survey 2023, n=1,862

MANY E-WASTE RECYCLING OPTIONS ARE NOT KNOWN AT ALL

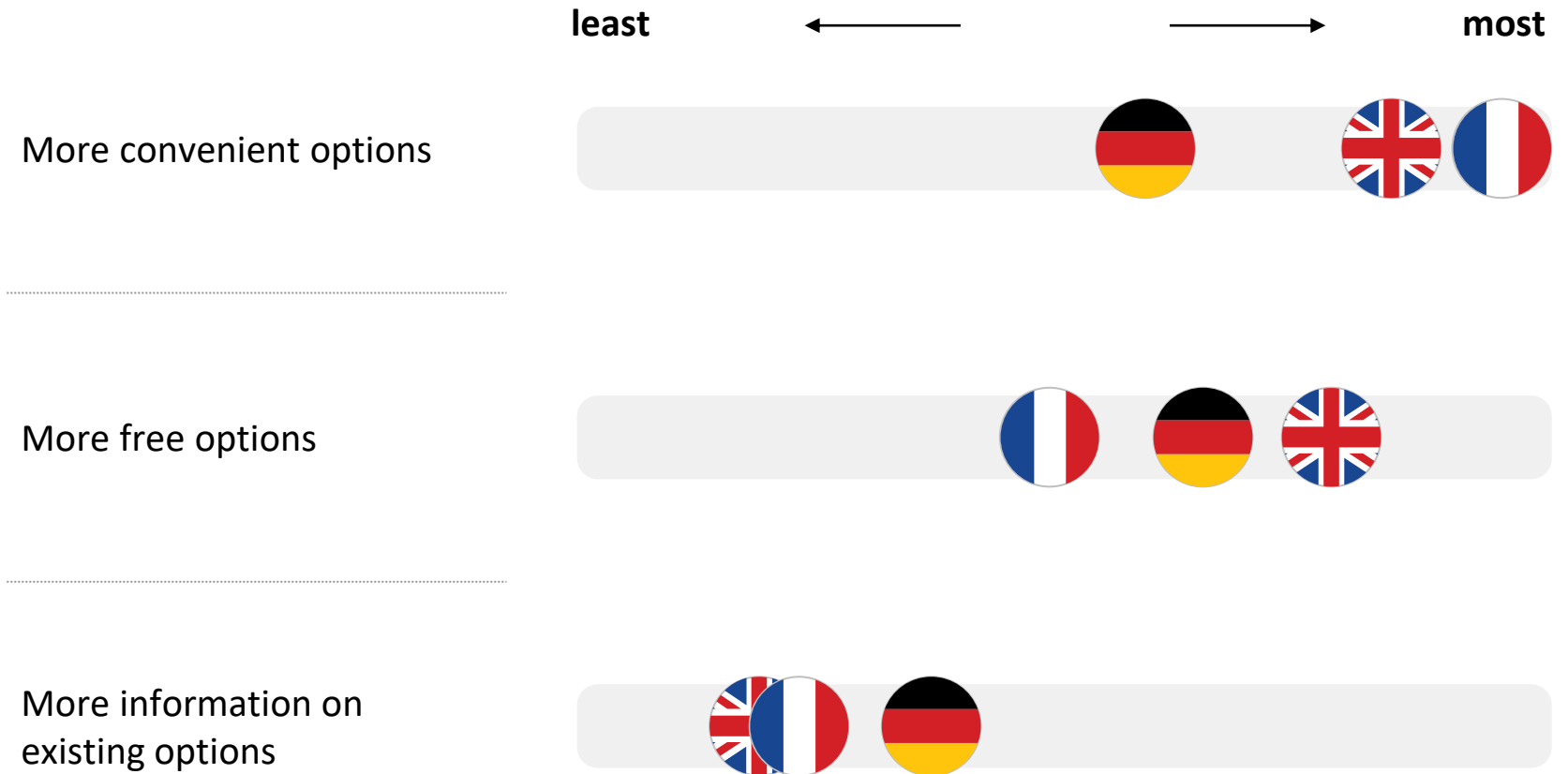
“I know this option exists for recycling e-waste”



1. Option dependent on country, city or municipality; Source: Oliver Wyman Consumer Survey 2023, n=1,862

CONSUMERS WOULD LIKE TO HAVE MORE CONVENIENT AND FREE OPTIONS TO RECYCLE E-WASTE

“To increase the recycling share of e-waste we need ...”



Source: Oliver Wyman Consumer Survey 2023, n=1,862

**IDEAS FROM OUR
CONSUMER PANEL
ON HOW TO
INCREASE
RECYCLING SHARE
OF E-WASTE**

Frequent pick up by municipality
Easier access to collection sites
E-waste garbage bins

Flyer/letters to each household
Purchase radio time to inform
E-waste Stations at Supermarkets or Gas Stations
More visibility for existing options

Create Awareness day
Dedicated E-Waste bins
Public E-waste website
Mandate Sellers to accept E-waste

Label new items
Designated E-waste collection points

Free collection by the city
Labels on the devices
Return options for people without means to transport

Free pick-up for large e-waste items
Incentive systems – getting something in return

Deposit model
Free pick-up connected to purchase of new products

Recycling Stations

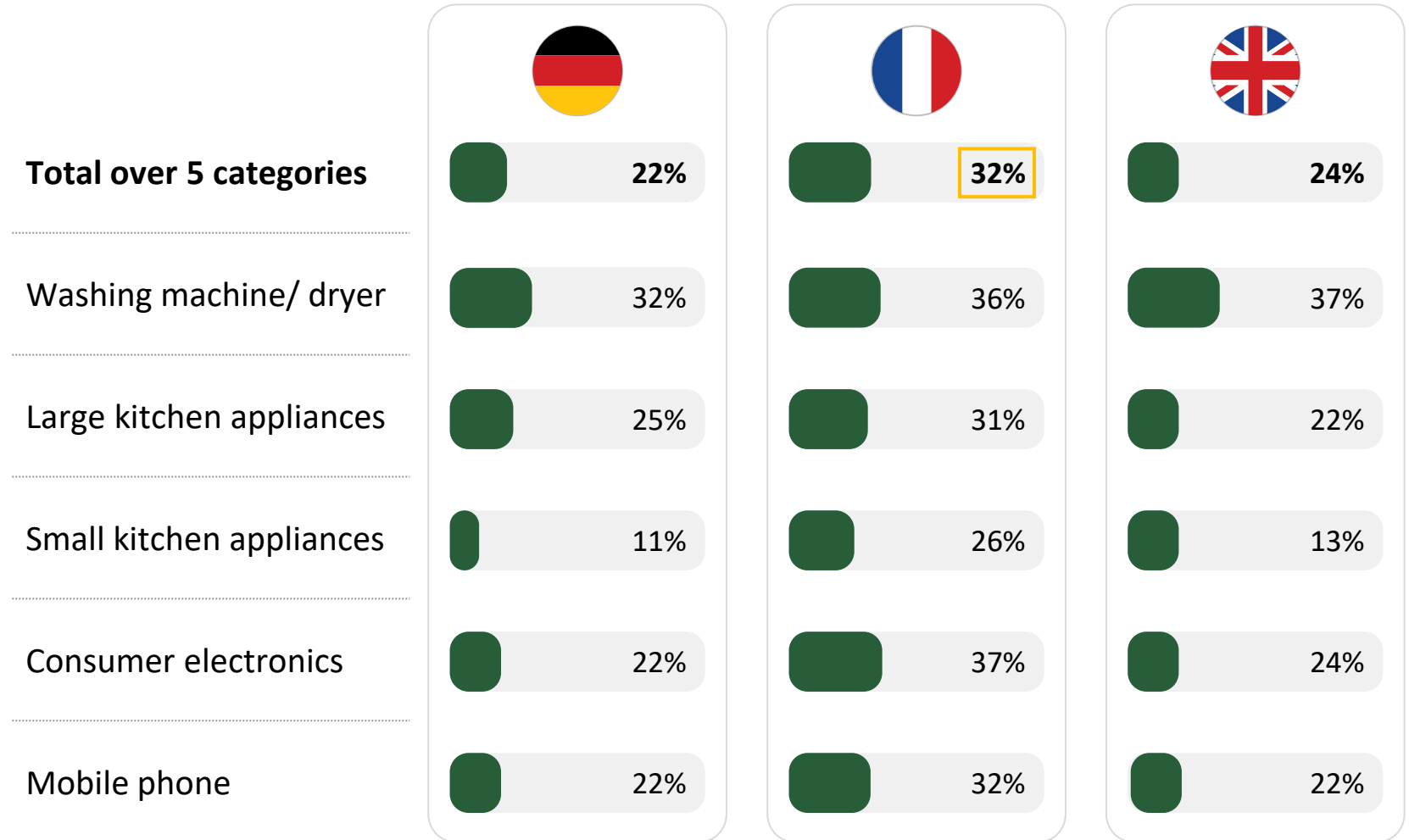
Boxes should be labelled with E-waste info

Educate pupils in school
City cleaning days (“Kieztage”)

SIMILARLY, SHARE OF REPAIRED GOODS LOW ACROSS PRODUCTS

France stands out as being eager to repair – first impact of Green Deal pilots?

“Last time this broke down, I repaired it”

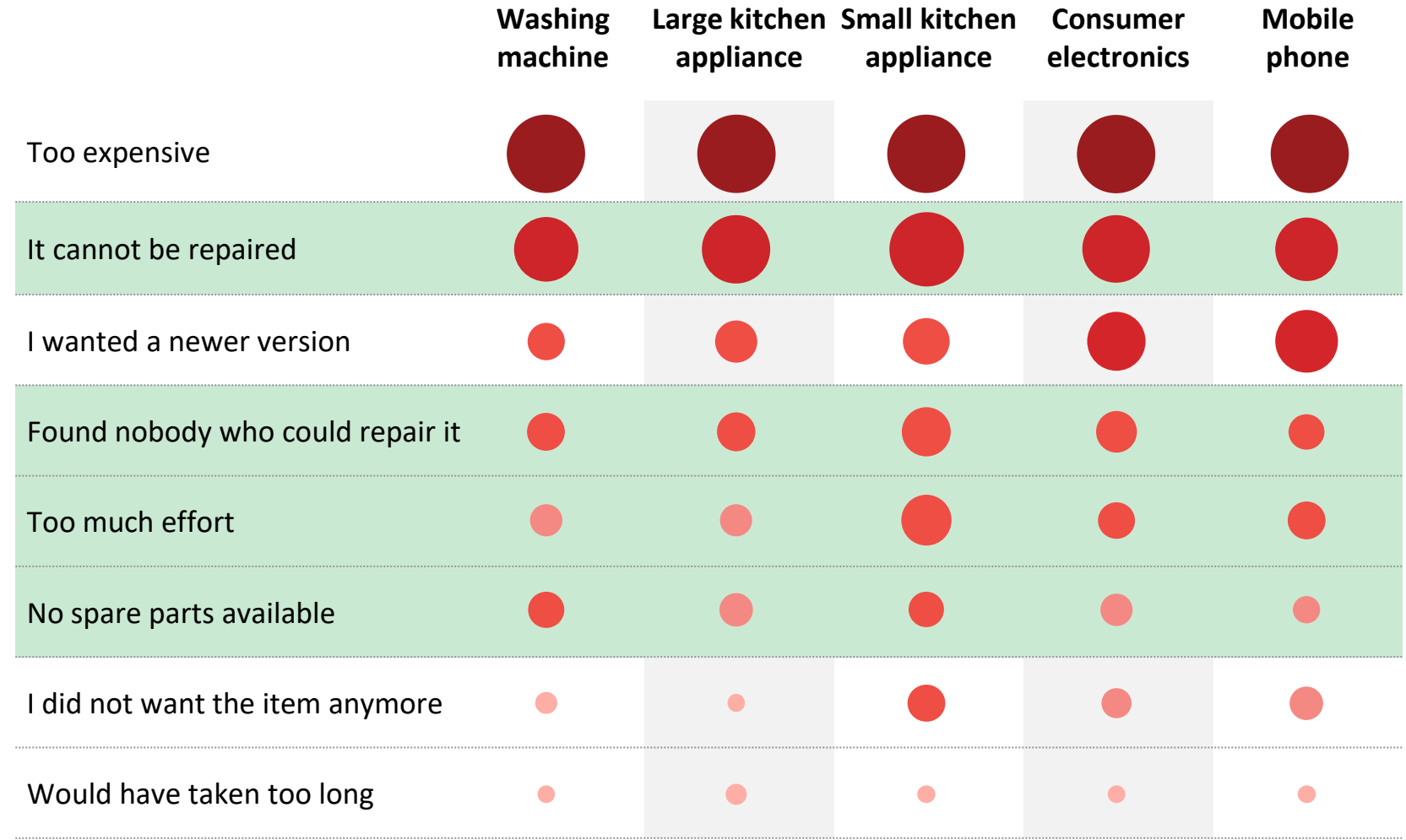


Source: Oliver Wyman Consumer Survey 2023, n=1,862

MANY REASONS AGAINST REPAIRING ARE SOLVABLE

Devices need to be repairable, qualified staff and spare parts need to be available

“I didn’t repair this because ...”



Source: Oliver Wyman Consumer Survey 2023, n=1,862

CONCLUSIONS WE ARE DRAWING FOR CONSUMER & HOME ELECTRONICS BRANDS



Consumers are eager to make sure their used electronics are recycled, but **lack the awareness of the options** available to do so – leading to **valuable resources wasted**



Manufacturers contribute by making their **products recyclable**, and liaise with trade partners on how to create **intuitive options for consumers for recycling**



By providing information, free and easy access to recycling options, **governments and retail can contribute immensely** and as a consequence make further **access to increasingly hard-to-find resources** possible



Demand for repairability is increasing and shares are **visibly higher in 'Green Deal' pilot market France** – mindset expected to catch up in other markets



To successfully implement the new requirements, **all stakeholders** can contribute, considering **their capabilities** and **requirements** regarding **safety** and **quality**