



G O N G

COMMUNICATIONS

INFLUENTIAL VOICES
IN UK WASTE MANAGEMENT

2019



Since the start of the 'Attenborough Effect' in 2017, public pressure has been mounting on producers to cut the use of visible causes of waste as well as answering questions about the presence of waste in the natural environment – propelling those responsible for managing it into the public spotlight.

Whilst the causes and effects of waste are clear to see, the intricate challenges of effective waste management and bigger-picture factors associated with waste generation such as growing food demand, increasing urban populations, a disposable consumption culture and limited public funding are less understood. These aren't just mainstream issues, but factors where there are information gaps throughout B2B supply chains. Wherever they exist, we believe that these information gaps are potential opportunities to collaborate, problem-solve and potentially grow. That's why it's more important than ever that waste management companies step up and help shape public awareness as well as driving the dialogue in policy and commercial discussions.

Proactive communication is an area where the waste management industry has been more modest than other industries, but a wide variety of companies in the UK are steadily increasing their profile and influencing agendas.

Gong's review of waste and resources management companies in the UK during the last 12 months highlights our top 12 favourite organisations based on their level of engagement on key topics, educational initiatives as well as on and offline presence. This is a topline snapshot from the perspective of those outside of the industry, looking in. In our summary below, we look at what can be learned from the bigger players and areas where smaller, niche players are doing well.

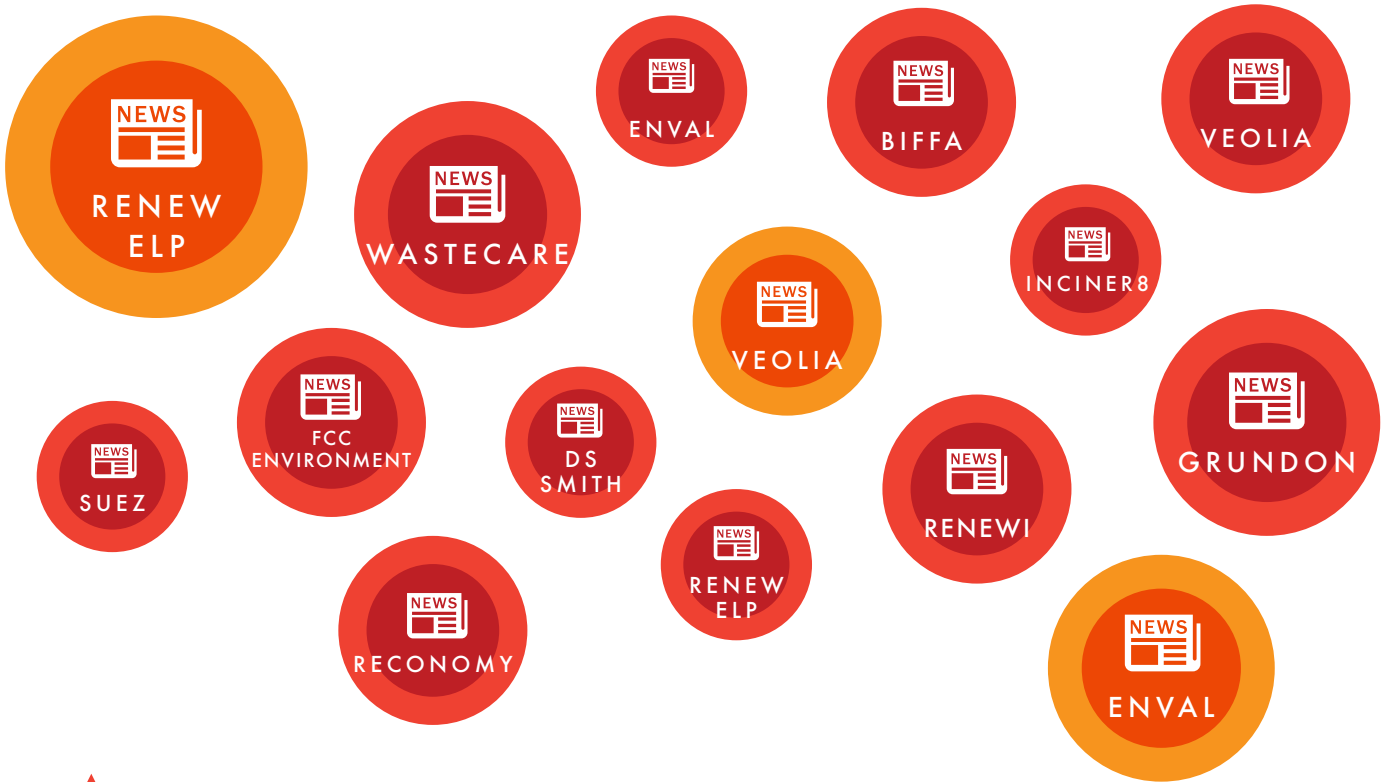
TOP BRAND BUILDERS OF 2019

The logo for Biffa, featuring the word "Biffa" in a bold, red, sans-serif font.The logo for DS Smith, featuring a stylized orange and yellow leaf-like shape to the left of the text "DS Smith" in a black, sans-serif font.The logo for enval, featuring a green, three-lobed circular icon to the left of the word "enval" in a black, sans-serif font.The logo for FCC Environment, featuring the letters "FCC" in a blue and green font with a green arrow pointing right, and the word "Environment" in a smaller blue font below.The logo for GRUNDON, featuring the word "GRUNDON" in a white, sans-serif font centered on a solid blue rectangular background.The logo for INCINER8, featuring a small colorful triangle icon to the left of the word "INCINER8" in a black, sans-serif font.The logo for Reconomy, featuring the word "Reconomy" in a blue, sans-serif font with a green recycling symbol integrated into the letter 'y'.The logo for ReNew ELP, featuring a stylized blue 'R' icon to the left of the text "ReNew ELP" in a blue, sans-serif font.The logo for renewi, featuring the word "renewi" in a green, sans-serif font with a circular arrow graphic around the letters 'e' and 'w'.The logo for suez environnement, featuring a green circular icon with a white swirl to the left of the text "suez environnement" in a black, sans-serif font.The logo for VEOLIA, featuring a red circular icon with a white dot inside to the left of the word "VEOLIA" in a red, sans-serif font.The logo for WasteCare, featuring the word "WasteCare" in a blue and green, sans-serif font with the tagline "WeCare about recycling" in a smaller green font below.

THE MEDIA STARS

KEY: ● Trade & Specialist Media Presence ● Shaping the Debate in Mainstream Media

The size of circles represents each company's prominence in each category based on our research findings



Overall star: ReNew ELP

Unsurprisingly, there was a mix of news covered in trade and specialist media (e.g. sustainability and environmental) from companies spanning new contracts, such as Veolia's tech-driven City of London Waste Contract; Reconomy's acquisition of the environmental compliance business, Valpak; the approval of Biffa's plans for its £15 million plastics recycling plant; through to Renewi's innovative use of green loans for refinancing. Opinions were shared within the trades regarding Government proposals for banning single use plastic, DEFRA's consultation on reforming the UK packaging producer responsibility

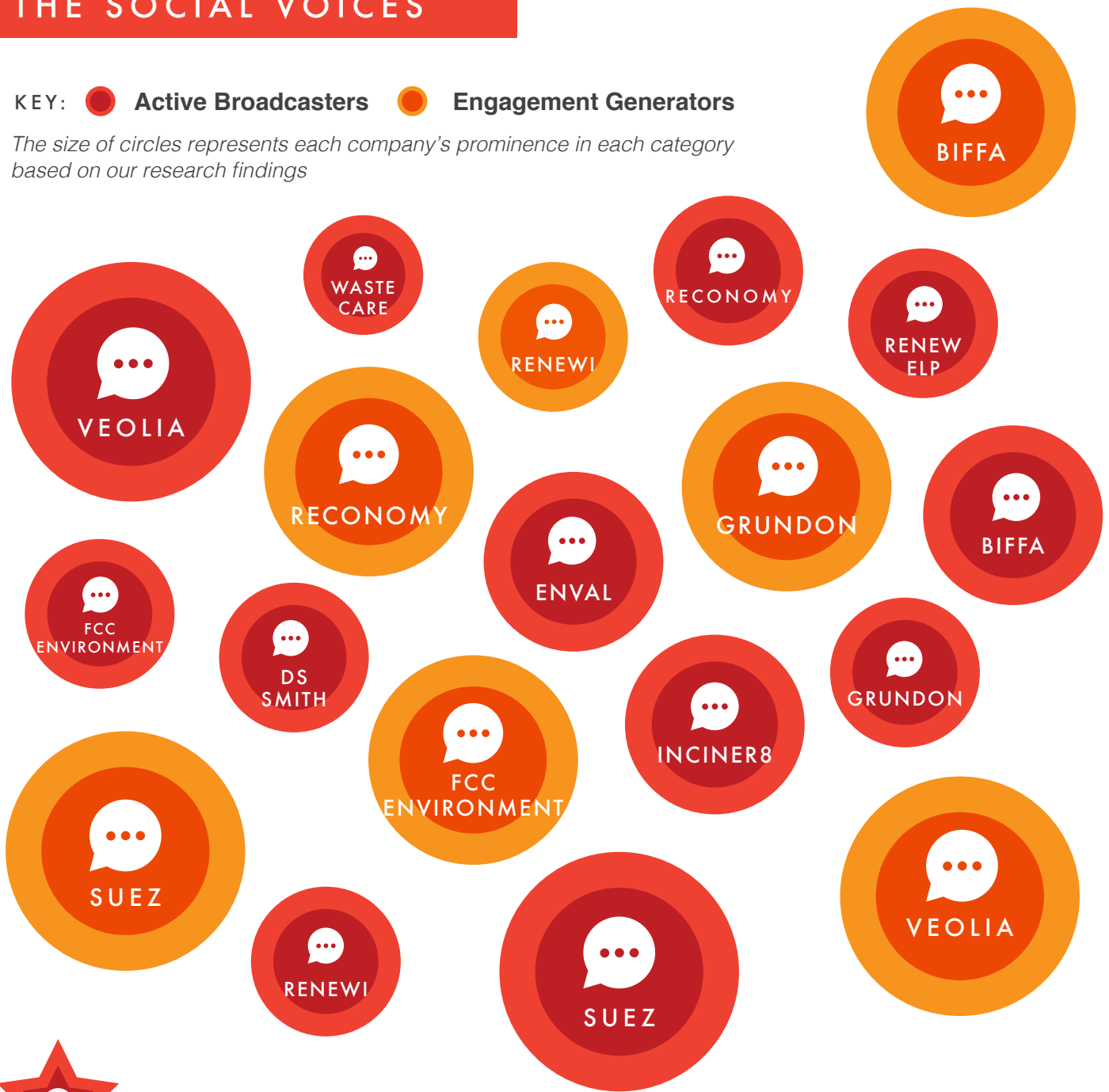
system, the UK's capacity to tackle recycling as well as a variety of new services launched to meet growing recycling needs (e.g. Grundon's paper cup recycling service and Renewi's circular bins). It was encouraging to hear waste-tech company, Rennew ELP, shaping the plastic waste debate on BBC Radio 4 as well as Enval driving awareness of the growing issue of food pouches going to landfill in The Times, bringing unknown issues where the waste management sector is problem-solving into mainstream awareness.



THE SOCIAL VOICES

KEY: ● Active Broadcasters ● Engagement Generators

The size of circles represents each company's prominence in each category based on our research findings



Overall star: Veolia UK

Most waste and resource companies are still tentatively dipping their toe in the waters of social media although proactive engagement is increasing. This has been most successfully achieved by large companies such as Veolia, Suez and Biffa. Veolia is successfully driving discussion and sharing ideas on the circular economy via powering the hashtag #livingcircular. However, smaller organisations

are showing as engagement generators, which demonstrates that despite lower follower volumes it is still possible to cultivate interaction through great content and active listening on social channels. In a sector that is both visual and technical, we encourage more companies to take Suez Recycling and Recovery UK and Veolia UK's lead in sharing accessible, bite-sized video content on social.



THE EDUCATORS

Informative Whitepapers, Report Contributors & Explainer Videos

The size of circles represents each company's prominence in each category based on our research findings



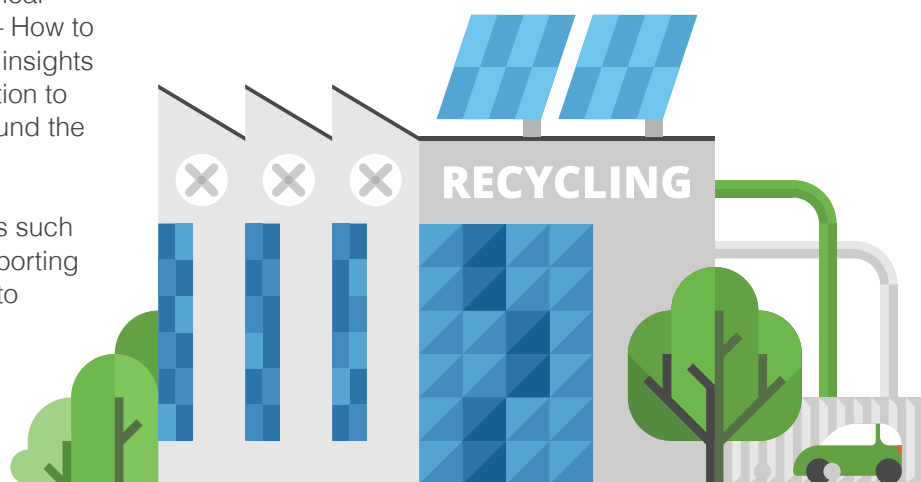
Overall star: Suez

This category highlights those who have demonstrated issues leadership and industry insight through the publishing of whitepapers, reports, contributing to third party reports and sharing explainer videos online to illustrate their work. Naturally with more resources at their disposal, Veolia UK and Suez UK have both shared a steady stream of insights, for example, Veolia's assessments of the impact of the UK Waste and Resources Strategy and its research and insights into the multi-faceted issues surrounding plastics in its Plan for Plastic report. Suez also put forward methodical proposals for achieving a circular economy through a producer-responsibility system for products and packaging. DS Smith shared its perspective via a methodical 'Five Steps to Better Recycling Performance – How to Guide' and Reconomy has published various insights with a planning and operational focus in addition to spearheading conversations more widely around the use of tech and data in waste management.

It is also encouraging to see major companies such as Biffa, Suez UK, Veolia UK and Grundon reporting their gender pay gaps as part of their moves to

continuously improve workplace diversity and inclusion. As these reports are becoming increasingly detailed, using infographics to highlight data or posting bite-sized videos to talk viewers through the strategy and results can provide more accessible ways of communicating the highlights.

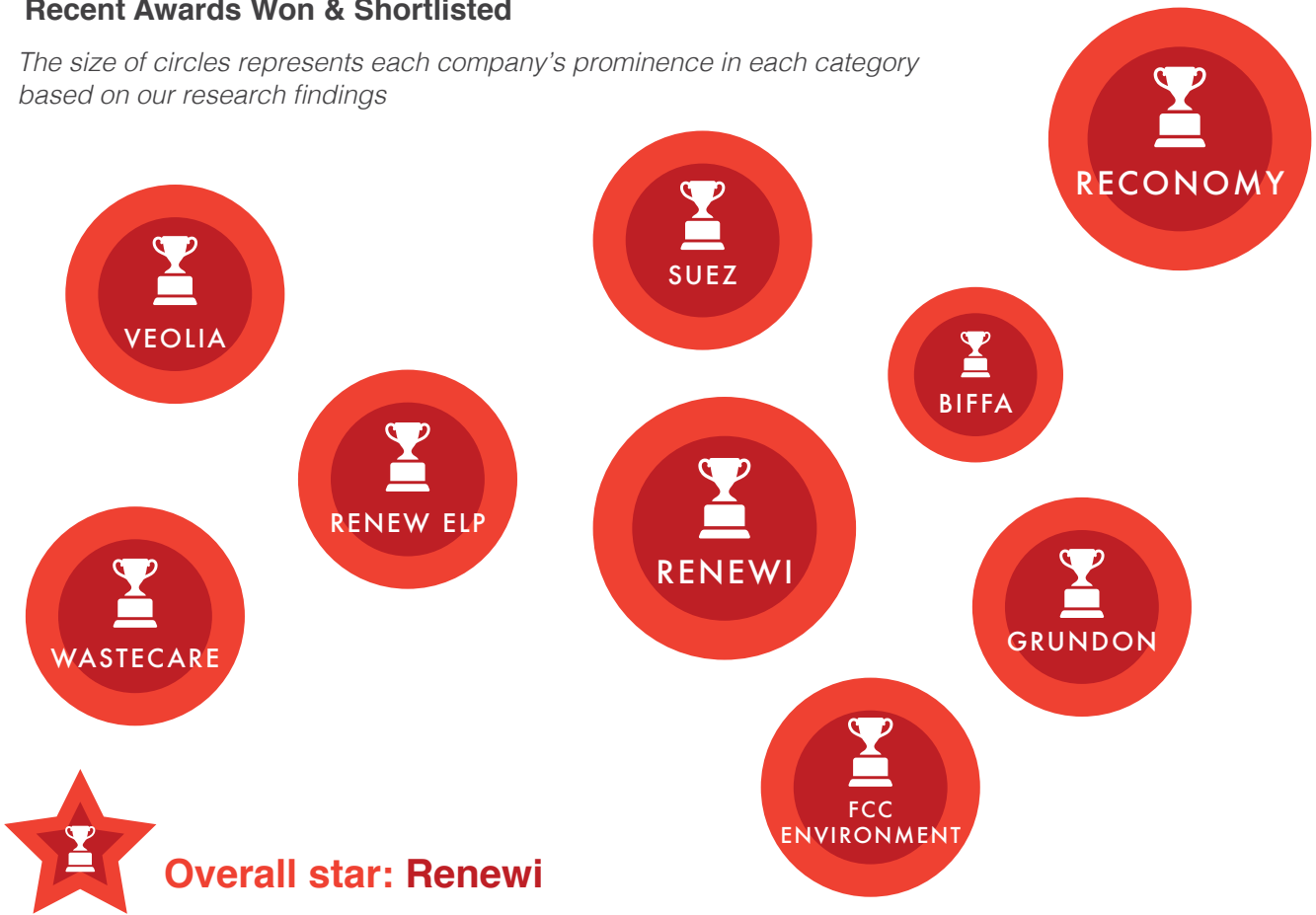
In a similar approach to YouTube, smaller companies are embracing the use of video to explain how their innovations work. In our opinion, one of the best to describe a niche process is Enval's **'Where there's muck there's aluminium (if not brass)'** in conjunction with the University of Cambridge.



THE RECOGNISED

Recent Awards Won & Shortlisted

The size of circles represents each company's prominence in each category based on our research findings



Overall star: Renewi

Industry awards continue to be one of the most popular sector-based marketing initiatives for waste companies, with there being a fairly even playing field for receiving recognition across size and specialism. One of the stand-out shortlisted entries at the 2018 National Recycling Awards was Renewi and the Barnsley, Doncaster and Rotherham councils' implementation of WRAP's Love Food Hate Waste campaign across South Yorkshire. The initiative demonstrated the intersection of commercial, public and community partnerships to increase community engagement and change public behaviour towards

food waste using a combination of creative ideas, community events, local media, direct mail and a strong presence on Facebook & Twitter.

Due to the quality of cutting-edge innovation that exists in hidden pockets of the industry, we encourage companies to branch out and consider entering bigger, bolder business excellence awards such as the Financial Times' Transformational Business Awards, especially if they are looking to scale, drive awareness into broader business segments or secure investment.



TAKEAWAYS

Effective waste and resources management will continue to rise in relevance to companies managing the sustainability of their supply chains, as well as evoking emotion amongst an increasingly environmentally aware public.

Now's the time for waste companies to shape the direction of policy and commercial discussions, educate customers on the innovations that are becoming available and encourage collaboration across sectors and society where influential macro issues still need to be tackled.

Waste and resources companies with a strong profile and good reputation are best placed to translate this increased transparency into new business.

Are your communications ready to capitalise on this opportunity? Here's a quick checklist to help you find out:

- Do your comms bring to life what you do, why it's different...and most importantly, why it matters?
- Do you have a senior team that can engage charismatically about the business, consistently landing your messages across different platforms? (For example, speaking to media, conference panels, on LinkedIn, via your website?)
- Do you have memorable, stand-out opinions on issues that resonate with potential customers or other important stakeholders? Are they easily articulated and clearly evidenced?
- Do you know what your competitors are focused on to avoid coming across as a 'me-too'?
- Are you clear on your priority audiences and which journalists, influencers and opinion formers they trust?
- Are you prepared to respond competently to a crisis, if one happens? Do you know what your highest risk areas are and what would be expected of you during an event?



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For more information on how Gong can help with your brand and communications, contact **wasteandresources@gongcommunications.com** or call **0207 9354800**.

Visit **www.gongcommunications.com**