

EXECUTIVE SUMMARY

Purpose of the 2018 CRNS Membership Survey

Understanding how CRNS members contribute to the wider objectives of the Scottish Government's circular economy strategy "Making Things Last"¹ is important. At the time of writing there were currently 123 CRNS full members carrying out a variety of resource management activities in Scotland that contribute to this strategy.

How was the data collected?

A web-based survey was designed and sent out via Survey Monkey² to 123 member organisations in October 2018 with follow-up reminders by email and telephone. Some data was also gathered from public records including OSCR and published annual accounts.

OVERALL IMPACT OF THE SECTOR

The Community Resources sector continues to have a significant impact as CRNS membership delivers the following benefits



¹ Making Things Last: A Circular Economy Strategy for Scotland, 2016

² www.surveymonkey.com

Members Survey 2018

Nature of our membership

102
Registered Charities

30
Identified as a Social Enterprise (CIC or SCIO)

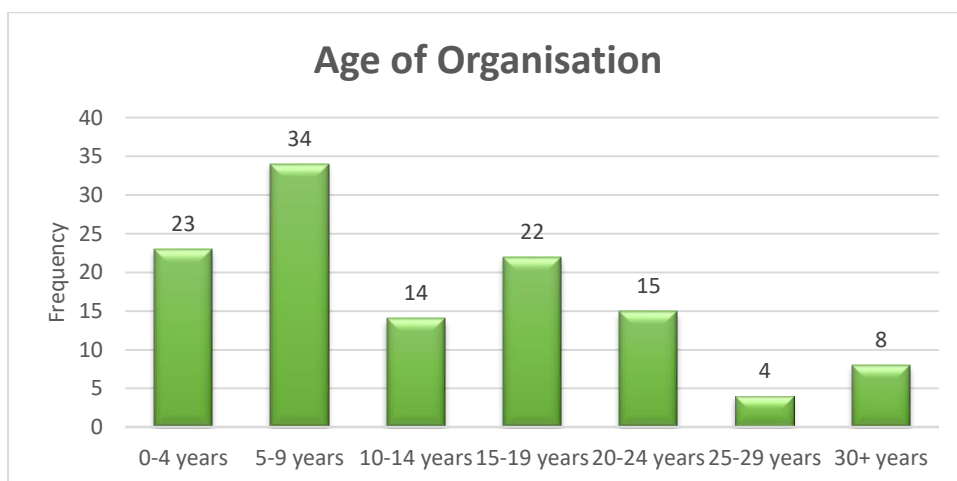
12
Average age of organisation

32
Members are active in all 32 local authorities

Most active areas
Glasgow
Edinburgh
Aberdeenshire
Fife

Least active areas
Shetland
Inverclyde
South Ayrshire
Orkney

Age of Organisation

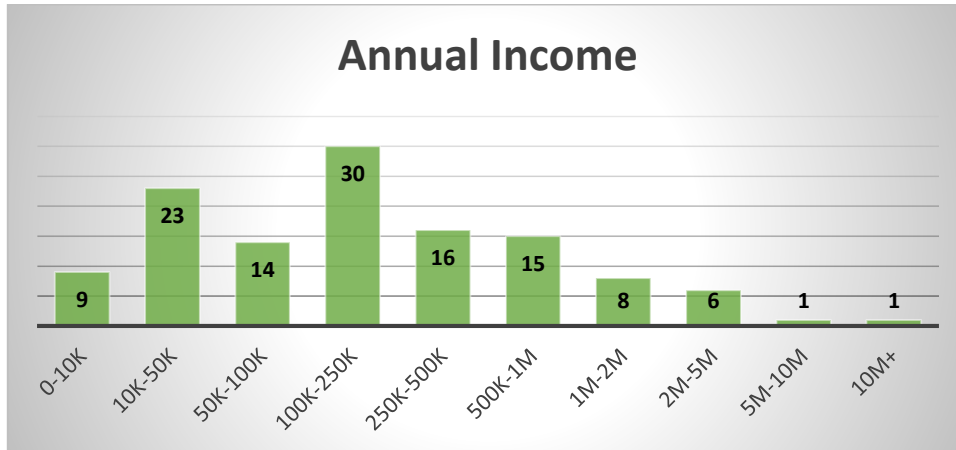


23 organisations reported that they were less than four years old, 27 organisations reported that they were at least 20 years old and the average CRNS member organisation is 12 years old.

This data suggests that new projects and organisations are continuing to enter the resource management sector and this is very encouraging. Over 50% of CRNS member organisations are over 10 years old and indicates that the sector is very well established.

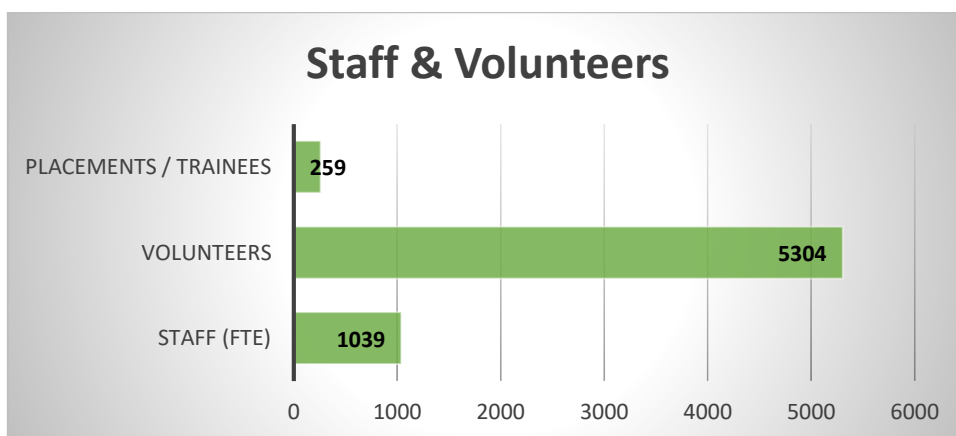
Members Survey 2018

Annual Income



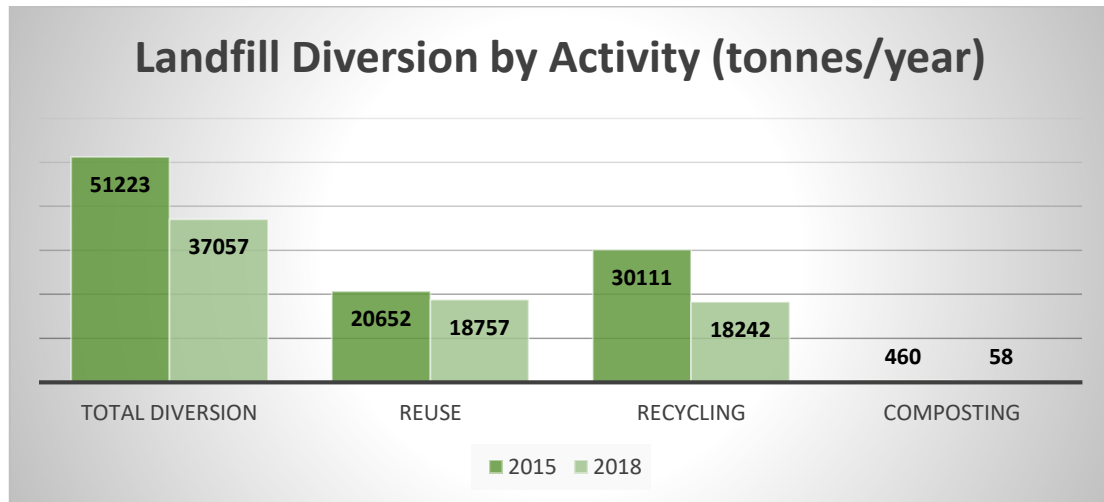
CRNS member organisations reported a gross income figure of over £75 million which is a significant figure (2015 turnover was £63 million). It will include both earned income from sales and services as well as funding income.

Staffing



Member organisations collectively support significant numbers of paid and volunteer staff and this reflects the fact that the third sector has traditionally been an important recipient of volunteer support.

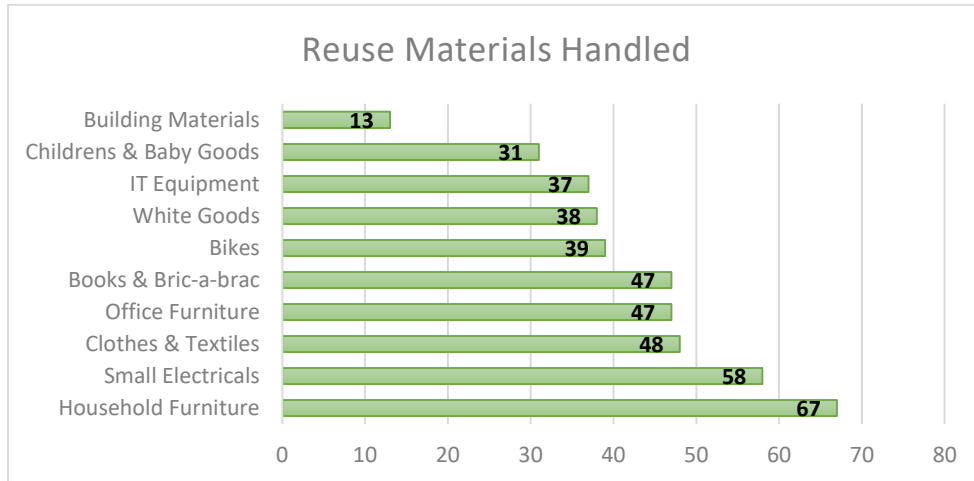
Landfill Diversion



A comparison with the CRNS membership survey from 2015 shows a reduction of 14,166 total tonnes diverted from landfill in 2018.

Revisiting the 2015 data there are 2 major organisations that reported significant tonnage totals; namely **ACE Recycling** reporting 19,000 tonnes of recycling (from their commercial recycling service which included glass) and **Active4All** reporting 3000 tonnes of reuse (from their building reclamation reuse yard). ACE Recycling was taken over by a private company in 2017 and is no longer a member whilst Active4All went into liquidation in 2016. If both these organisations are excluded from the 2015 and 2018 results, **Reuse, Recycling and Total Diversion tonnage have all increased for the wider membership.**

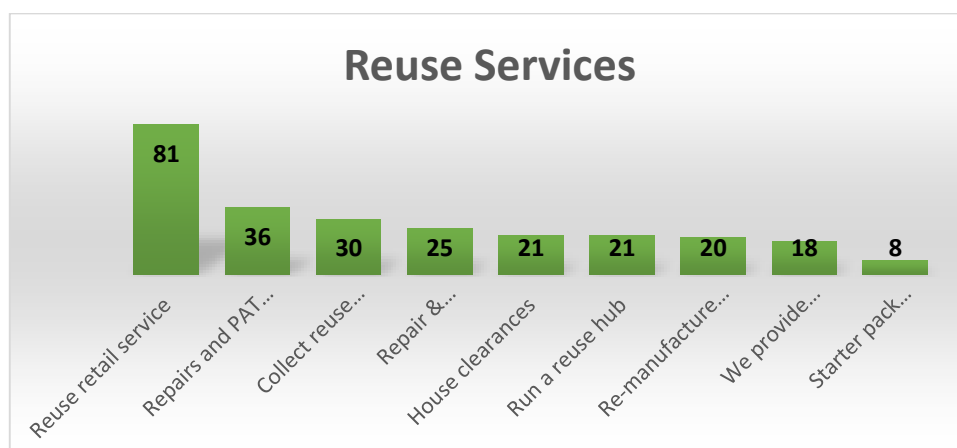
Reuse Materials



The most commonly handled items by CRNS members are household furniture, small electricals and clothes & textiles. The survey did not ask for a breakdown of tonnages for individual materials.

The survey did not differentiate between organisations that are general reuse projects and organisations that deal with a single material. For example, 39 member organisations accept bikes and a number of those will be exclusively bike projects whilst a number will be general reuse projects that accept bikes as well as other materials and items.

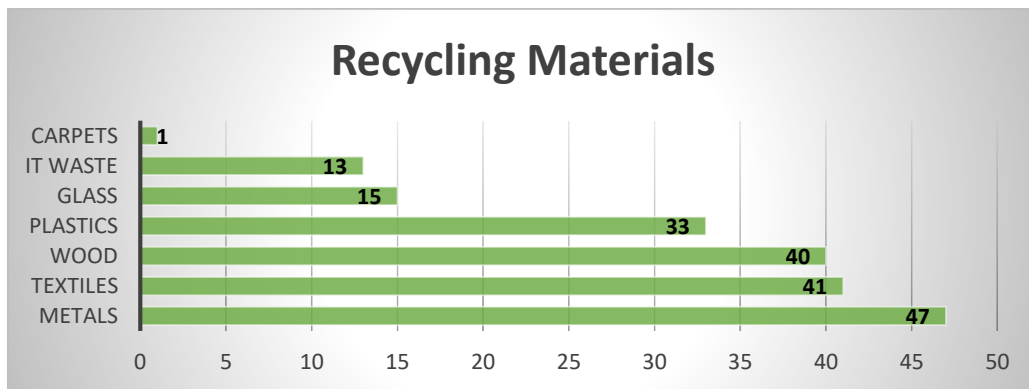
Reuse Services



These are the most common activities that reuse projects undertake and is a reflection of organisations understanding that repaired or upcycled items have more value than items that have to be recycled.

8 organisations manage a starter pack service and 18 organisations offer furniture to formally referred clients. This demonstrates a commitment to the social aims of a number of reuse projects and that they are not explicitly resource management projects. The CRNS Reuse Consortium continues to support these social activities.

Recycling Materials



The most common recycling materials handled by CRNS members are textiles, wood and metals. The survey did not ask for a breakdown of tonnages for these materials.

Recycling Services

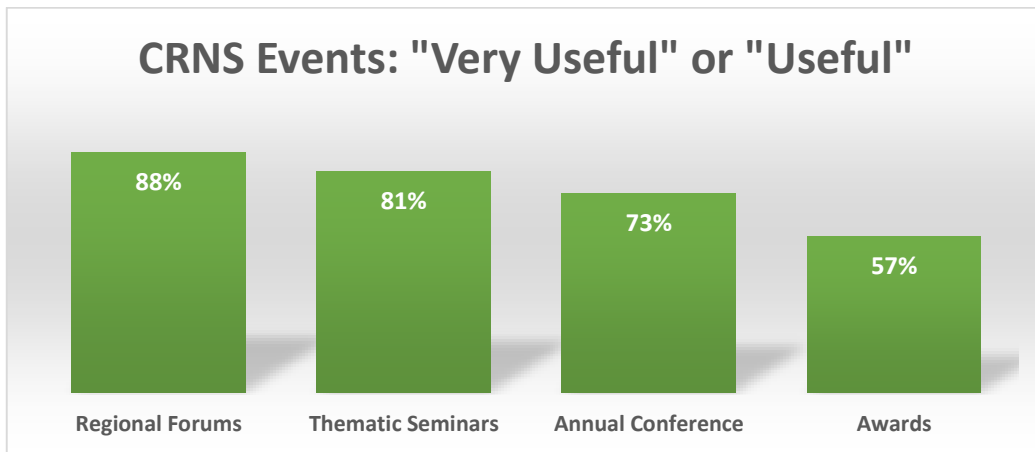


A number of CRNS members currently deliver a formal recycling service to local authorities or businesses, however local authorities are becoming less reliant on the third sector to deliver recycling services.

Members Survey 2018

CRNS Member Services

We asked our members about our events, communications, fees and services. For those members that expressed a preference, this is what they told us:



The most popular topics of interest at CRNS events were:

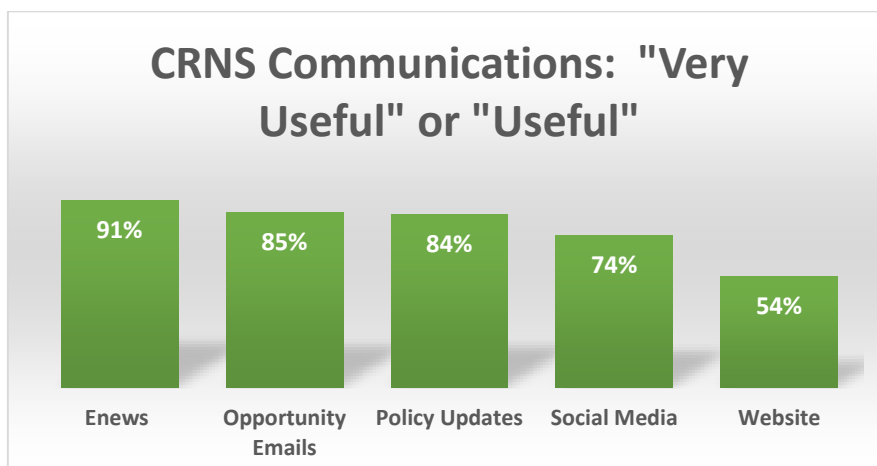
Fundraising

Social Media & Marketing

Recycling

Upcycling

Health & Safety



Members Survey 2018



CRNS Value for Money

We are pleased to see that as a whole our membership sees CRNS membership add good or great value for money. We will continue to work hard to try and improve our membership offering going forward.

