



Beyond the Plastic Bag: Sparking a Seachange for Reuse

FIRST-OF-A-KIND MULTI-RETAILER PILOTS
WITH CVS HEALTH, TARGET & WALMART

About the Center for the Circular Economy at Closed Loop Partners

The Center for the Circular Economy (“the Center”) is the innovation arm of Closed Loop Partners, a leading circular economy-focused investment firm in the United States. The Center executes research & analytics and unites organizations to tackle complex material challenges and implement systemic change that advances the circular economy. The Center brings together designers, manufacturers, brands, recovery systems operators, trade organizations, municipalities, policymakers and NGOs to create, invest in and support scalable innovations that target big system problems.



About the Consortium to Reinvent the Retail Bag

The Beyond the Bag Initiative, launched by the Consortium to Reinvent the Retail Bag aims to identify, pilot and implement viable design solutions and models that more sustainably serve the purpose of the current retail bag. Closed Loop Partners’ Center for the Circular Economy launched the initiative with Founding Partners CVS Health, Target and Walmart, alongside Sector Lead Partners, Supporting Partners, and Environmental Partners. The Consortium’s Innovation Partner, IDEO, worked closely with Closed Loop Partners and our retail partners in designing and running the reusable bag pilots that took place in Northern California, and are the subject of this report.



Table of Contents

FOREWORD	3
INTRODUCTION	5
Why does the single-use plastic retail bag need reinventing?	
How do we approach eliminating the single-use plastic bag?	
What role do retailers play in advancing reuse?	
What do we already know about reuse?	
What must retailers consider when implementing reusable bag services?	
What's covered in this report?	
SECTION 1 WHAT WE DID	12
Collaborative Pilots in Action; Joint Reusable Bag Pilots at CVS Health, Target & Walmart	
What did the Beyond the Bag Pilots set out to do?	
How did we prepare for the multi-retailer pilots?	
What did pilot execution look like on the ground?	
Meet the innovators	
Where did the pilots take place?	
SECTION 2 WHAT WE LEARNED	19
Learnings From Across The Reuse Journey; The Key Moments Universally Applicable across Reusable Bag Services	
Customer-Facing Journey	
Behind the Scenes	
Key Takeaways	
SECTION 3 HOW TO SCALE	49
Partnerships Accelerating Scale; Best Practices for Replicable Multi-Retailer Reuse Programs	
THE PATH AHEAD	56



FOREWORD

Dear Reader,

It will take unprecedented collaboration to address the scale of our global plastic waste challenge. Bringing together the nation's largest retailers to test and pilot sustainable packaging solutions that operate across each other's stores is a critical step toward this collective goal.

The Center for the Circular Economy at Closed Loop Partners has been convening leading brands to tackle complex material challenges since 2018. Brands experience the same shared challenge: typically, after point of sale, they lose sight of their product or packaging. Without visibility into the systems beyond their scope of operation, it's difficult to ensure that materials don't end up in landfills or the natural environment. As a result, individual efforts fall short of solving what is a systemic challenge. To create value that outweighs the risks, it's essential for key players to innovate and collaborate.

In 2018, we launched the NextGen Consortium, convening leading food and beverage companies, including McDonald's and Starbucks, to identify and help scale widely recyclable, compostable and/or reusable cup solutions. In 2020, we launched the Consortium to Reinvent the Retail Bag and our "Beyond the Bag" Initiative with CVS Health, Target, Walmart, and others, to identify, pilot and implement viable design solutions that more sustainably serve the purpose of the current retail bag.

While we know the greenest bag is the one a customer already owns, and the Consortium to Reinvent the Retail Bag is advancing research and testing to increase instances of customers bringing their own bags, the

focus of this report is specific to the testing of reusable bag systems undertaken in summer 2021. We share our learnings from conducting first-of-a-kind reusable bag pilots across select CVS Health, Target and Walmart stores, where customers could "borrow" a bag and use it multiple times before returning it at the same or a different brand's store to be washed, redistributed and reused by other customers.

We've all had moments when we've forgotten our reusable bag or taken an unplanned shopping trip. In those moments, we need to meet customers where they are and offer the opportunity to borrow a reusable bag. Our Beyond the Bag Pilots ran for 10 weeks and illustrated how important experimentation and iteration are in developing solutions. Learnings from the pilots demonstrated firsthand what resonated with customers, retailers and other critical stakeholders to help further shape solutions.

Looking ahead, reuse models will play an important role in displacing single-use plastic in certain contexts, and we know that collaboration is key in accelerating their widespread implementation and adoption. These multi-retailer pilots showed how both reuse start-ups and large corporations can collaborate to build systems that are easy and convenient for customers and businesses to use, while

shifting away from our reliance on single-use plastics.

The transition from linear to circular systems will not happen overnight. We need to design and implement every aspect of the new systems thoughtfully to meet the needs of customers and retailers, and ensure a measurable environmental benefit. Iterative testing and data-driven decision-making can help avoid unintended consequences, like insufficient recapture of "reusables" or the one-to-one replacement of single-use plastics with reusables. We hope that this report serves as inspiration for forward-thinking organizations looking to bring reuse to the next level. The learnings from our reusable bag pilots extend far beyond this one product, and can help guide us toward a future in which reusing valuable materials and products in our economy becomes the commonsense norm.



Kate Daly

Managing Director
Center for the Circular Economy
Closed Loop Partners

Notes From Our Partner Retailers



Kathleen McLaughlin

Executive Vice President and Chief Sustainability Officer for Walmart

“The Beyond the Bag Pilots fostered an unprecedented platform for connectivity between trailblazing reuse start-ups, customers, Walmart, and other retailers in the industry. The pilots created the space for collective experimentation, and provided data-driven insights on the ease, convenience, and perceived benefits of the models tested. This kind of on-the-ground diligence from pilots is critical to inform what could be next for reuse and where it could fit in a circular economy,” says Kathleen McLaughlin, Executive Vice President and Chief Sustainability Officer for Walmart.



Amanda Nusz

Senior Vice President of Corporate Responsibility for Target & President of the Target Foundation

“Bringing Target, Walmart, and CVS Health to the same table demonstrates the partnership needed across our industry to address the challenge of plastic waste and achieve measurable environmental benefits for all. We’re grateful for the insights these pilots have provided, and we’re applying what we learned to identify bag options that are best for our guests, propelling more circular systems throughout retail,” says Amanda Nusz, Senior Vice President of Corporate Responsibility for Target and President of the Target Foundation.



Sheryl Burke

Senior Vice President of Corporate Social Responsibility for CVS Health

“Through partnerships with innovative startups, collaboration with other partners, and buy-in from our customers, the Beyond the Bag Pilots provided critical data-driven analysis on the role that reuse models could play in plastic waste mitigation when thoughtfully designed and their impact successfully measured. We still have a lot to learn collectively, but we’re thrilled to continue our journey towards a more circular future for retail,” says Sheryl Burke, Senior Vice President of Corporate Social Responsibility for CVS Health.



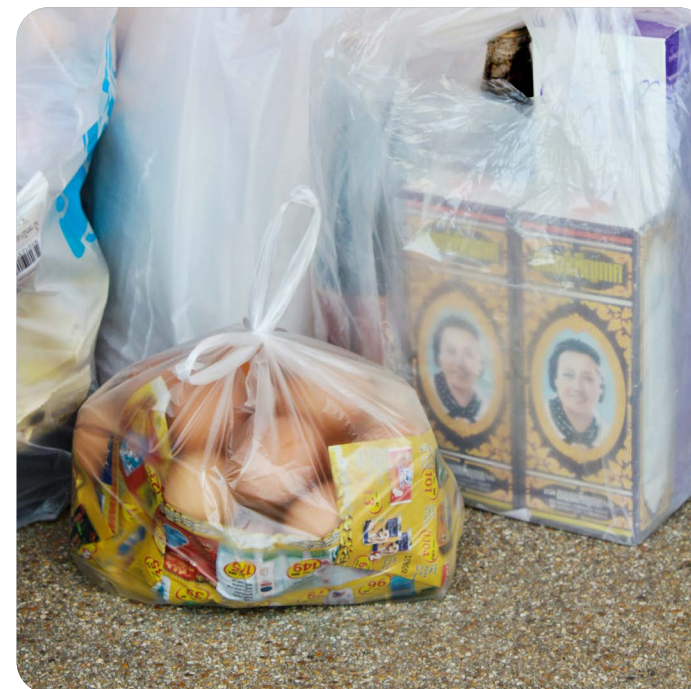
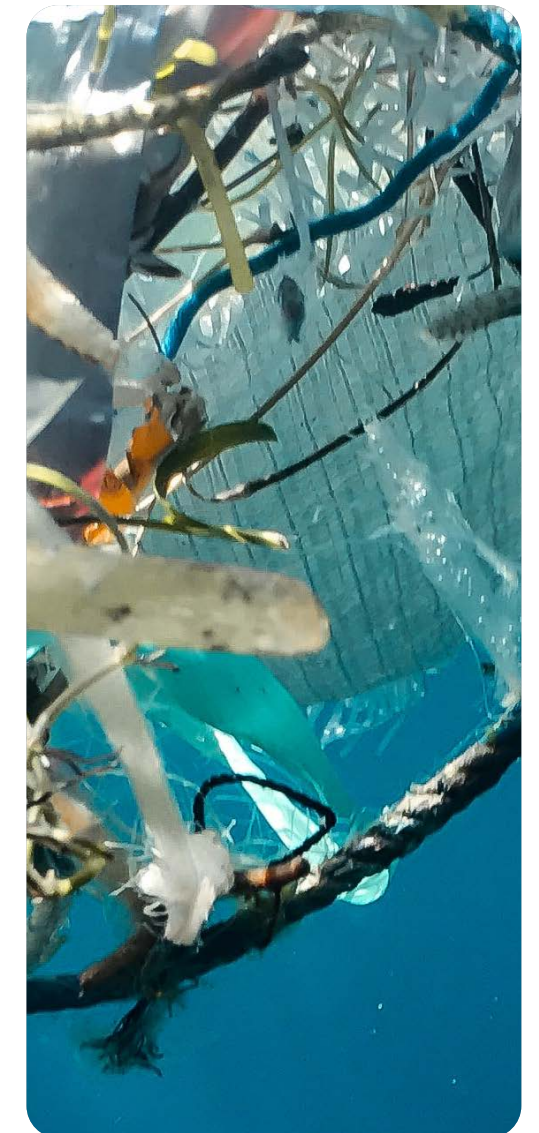
INTRODUCTION

Why does the single-use plastic retail bag need reinventing?

It's estimated that we use 100 billion plastic bags per year in the U.S. alone and fewer than 10 percent of these are recycled. While the convenience of the single-use plastic retail bag can't be disputed, the negative impact — considering its short use (12 minutes, on average) and long estimated lifespan — have led to rising customer concern, advocacy campaigns and regulatory bans and fees.

This is a challenge that is top-of-mind for communities and customers concerned about the impacts of single-use plastics on our environment and oceans, as well as for brands seeking more sustainable solutions. Current alternatives can be costly and inconvenient, often trading one environmental issue for another.

We need to move away from our current linear take-make-waste economic system and “disposable” culture, and toward a more circular economy in which materials are shared and re-used.



How do we approach eliminating the single-use plastic bag?

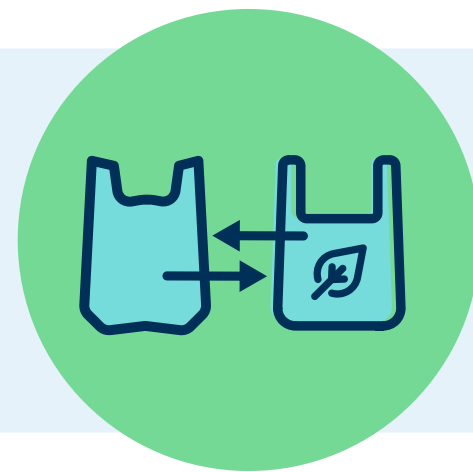
Customers today want convenience in getting their goods from store to final destination, and community and individual needs are not uniform. A model that works well in a suburban area where the majority of customers use a car is very different from a model that works for someone based in an urban area who must carry purchases on foot or on public transportation. We need to think about how, where and when consumers shop, ensuring that solutions are convenient, accessible and inclusive.

The Consortium to Reinvent the Retail Bag focuses its efforts across three core, interconnected workstreams to ensure a holistic approach to addressing a systemic waste challenge:



REDUCE the total number of single-use plastic bags used through education, incentives, nudges and policy

REUSE existing reusable bags that you have at home or “borrow” one as part of a reusable bag service



SWITCH to single-use bags made of renewable materials when reusable bags aren't an option and the necessary recycling or composting infrastructure is in place

What role do retailers play in advancing reuse?

In this report, we zoom in on the role of reusable bags in addressing plastic waste. If we want both adoption and lasting change, we need to develop reusable bag systems that seamlessly integrate with retail operations and are easy to use for consumers and businesses alike.

Reusable bag models come in different shapes and sizes to meet varied contexts and needs across retail. Some models put the onus on individuals to bring their own reusable bags in store, other models provide a service so that customers can “borrow” or rent reusable bags at a retailer’s store in case they forget to bring their own. This report focuses on the latter “reusable service” model in which customers are “borrowing” a bag onsite, reusing it before eventually returning it at the same or different retailer’s store to be washed, redistributed and reused by additional customers.

Today, retail is undergoing seismic shifts, with growing consumer demand for sustainable solutions, increasing regulation to mitigate single-use plastic waste, and evolving technologies and digitization that enhance the customer experience. This rapidly changing retail landscape spurs opportunities for innovation.

Retailers play a critical role in increasing the visibility and accessibility of innovative sustainable solutions to the public, offering fertile testing grounds for new reuse solutions.

At Closed Loop Partners, we use the framework of “Innovate, Test & Scale” in our partnerships with retailers, knowing there is value in iteration, especially when introducing sustainable innovations that seek to address existing social and environmental challenges. Mitigating any unforeseen consequences is a critical part of this work to ensure that we’re not replacing one problem with another. That’s why this report explores how retailers are collaborating with each other to collectively iterate, pilot and hone sustainable solutions and build greater circularity into their supply chains.

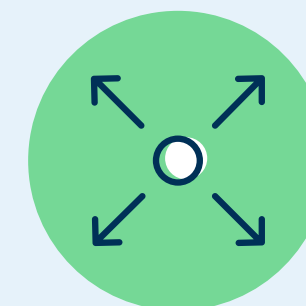
Building a more sustainable future for the retail industry won’t happen overnight, but with their growing focus on waste challenges, retailers are helping to accelerate experimentation and learnings across different contexts in the United States. We learn more with every different test and iteration, benefitting from additional data points and pressure testing of new systems. Ultimately, this path enables us to accelerate the catalytic change necessary to transition to a more sustainable retail system.



INNOVATE



TEST



SCALE

What do we already know about reuse?

The overall impact of reuse models depends on our willingness to collaborate across all aspects of the system — forging innovative new partnerships, advancing sustainability initiatives and developing new products and ways of collectively operating.

In 2020, Closed Loop Partners' NextGen Consortium, in partnership with Starbucks and McDonald's, ran several reusable cup pilots, publishing an open source resource — [Bringing Reusable Packaging Systems to Life](#) — that encourages the collaboration and the growth of reuse models.

TOGETHER, WE FOUND REUSE MODELS MUST:



1

Have a positive environmental impact



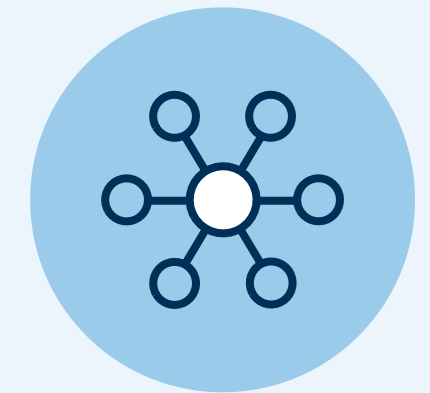
2

Provide a seamless, convenient experience for companies and customers



3

Be safe and hygienic at every step of the process



4

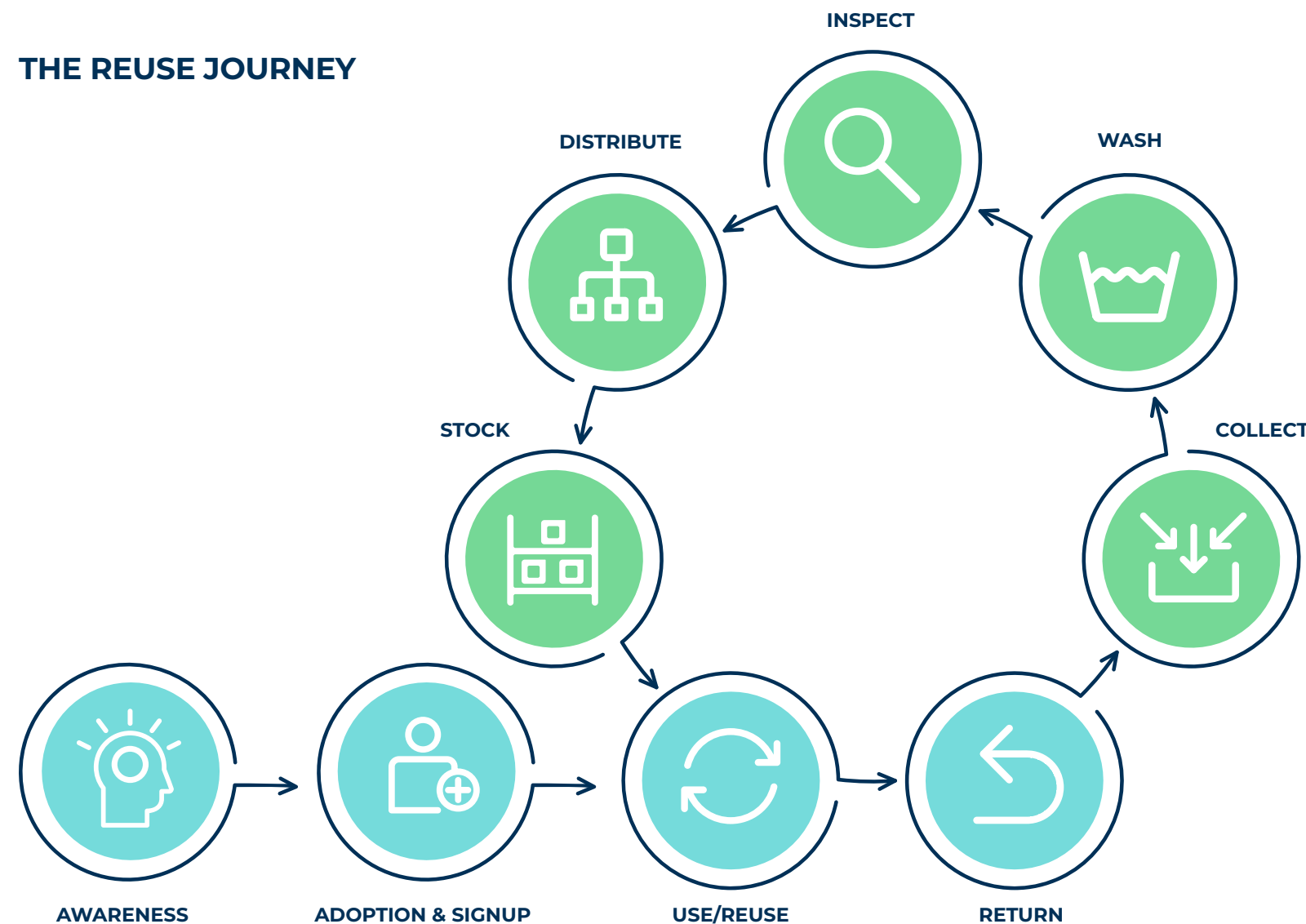
Be inclusive and accessible

What must retailers consider when implementing reusable bag services?

When retailers begin testing and implementing reusable bag services, the fundamental journey of the packaging starts to look quite different, and retailers need to look for opportunities to optimize the experience every step of the way.

Our Beyond the Bag Pilots unearthed key insights across the customer journey and behind the scenes — the reverse logistics and management — to determine what helps the long term social, environmental and financial viability of reuse models.

THE REUSE JOURNEY



KEY REUSE INSIGHTS

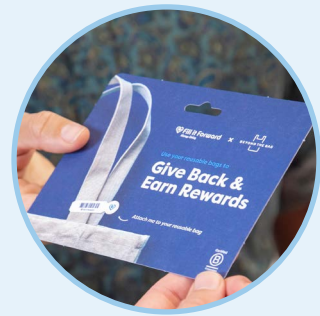
Customer-facing journey for reusable bag services

- **Effective storytelling is foundational for building AWARENESS**
Punchy, colorful and impact-oriented messaging is essential to engage customers
- **Convenience is king when it comes to ADOPTION AND SIGN UP**
Reuse needs to be just as easy as the single-use option
- **Customers are looking for a clear and easy reason to help them REUSE**
There are two kinds of motivations — rewards and environmental impact
- **Accessible drop-off points and quick confirmation of RETURN help build trust in the reuse system**
Ease of returns is a key factor for customers as they consider reuse

Behind the scenes action enabling reusable bag services

- **Partnering with the right stakeholders matters**
Partnerships across the value chain directly impact the sustainability of reuse
- **Impact must be measured at every stage**
Whether percentage of reusable bags recovered, water and energy usage, and damage or loss rates, data must be gathered at every stage of the journey
- **Further scaling reuse systems will help catalyze efficiencies**
As reuse grows, so do opportunities for shared infrastructure and other collaborations that can help optimize and scale systems

What is covered in this report?



SECTION 1 WHAT WE DID

Collaborative Pilots in Action

Joint Reusable Bag Pilots at CVS Health, Target & Walmart

Closed Loop Partners undertook first-of-a-kind joint retailer pilots to tackle single-use plastic bag waste. Leading retailers collaborated with one another, customers, innovative reuse startups, environmental organizations and team members across stores to test out reuse models with the shared goal of achieving a circular future for retail.

In this section, we detail how we took the necessary steps toward scaling reuse beyond individual retail stores, inviting public, inter- and intra-industry participation to test and prove the power and value of collaboration and developing shared infrastructure. The section shares insights on how the pilots came to be, from research to action in the field, and discusses the approach and methodologies implemented to maximize initiative success and learning opportunities.



SECTION 2 WHAT WE LEARNED

Learnings From Across the Reuse Journey

The Key Moments Universally Applicable Across Reusable Bag Services

Across the customer journey for reusable bag services — from the moment of awareness, to adoption, reuse & return, and continued participation — there are multiple logistical and emotional factors that contribute to success. As such, there are touchpoints throughout a customer's entire retail experience that serve as critical opportunities to make a compelling case for participation.

In this section, we unpack the key moments across the reuse journey, both from a customer's perspective and from what goes on behind the scenes. We share the insights that emerge as universally applicable across reusable bag services. Observations and learnings accrued throughout the customer journey suggest that emotional storytelling, clear messaging, incentives and ease of the reuse process are key components to achieve sustained buy-in from customers.



SECTION 3 HOW TO SCALE

Partnerships Accelerating Scale

Best Practices for Replicable Multi-Retailer Reuse Programs

We explore the dynamic interplay and opportunities for collaboration that come to life when multiple retailers work together on reuse, demonstrating a pathway forward for scale. Moving away from siloed individual retailer efforts helps fast-track potential for collaboration that can be iterated on in multiple reuse scenarios.

In this section, we evaluate our learnings from the multi-retailer pilots, sharing recommendations on key areas for cross-retailer collaboration to increase customer adoption of reuse by communicating incentives, raising brand awareness and easing technological experience, among other things.

SECTION 1

WHAT WE DID



Collaborative Pilots in Action

Joint Reusable Bag Pilots at CVS Health, Target & Walmart

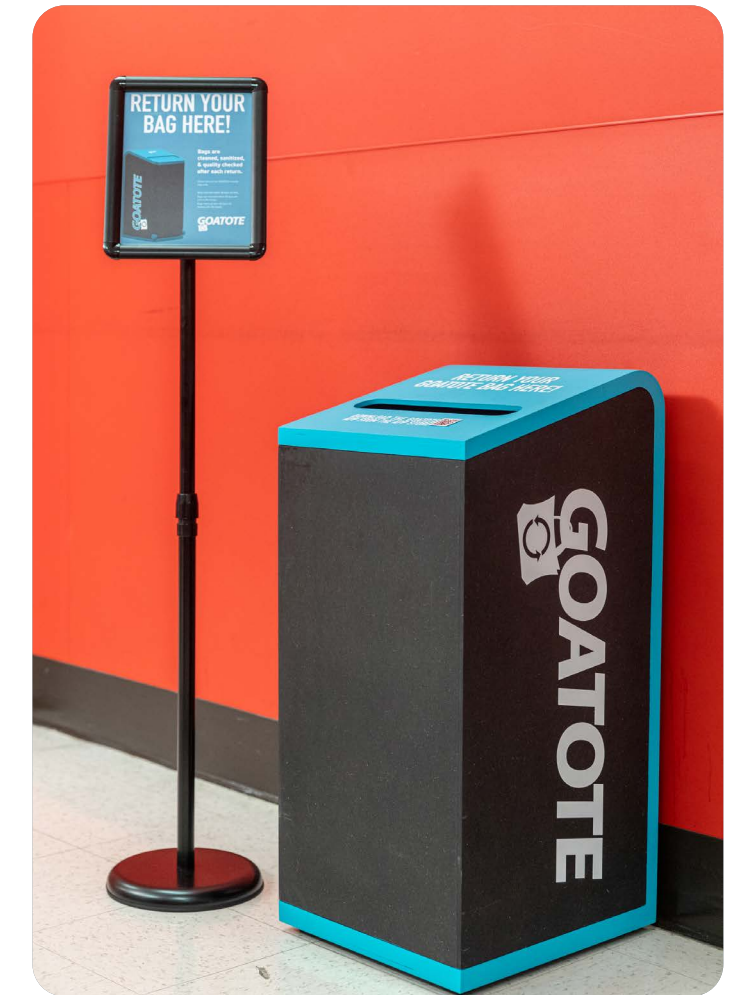
JOINT REUSABLE BAG PILOTS AT CVS HEALTH, TARGET & WALMART

What did the Beyond the Bag Pilots set out to do?

From August to October 2021, Beyond the Bag Challenge winners ChicoBag, Fill it Forward, GOATOTE and 99Bridges piloted their reusable bag solutions and/or technologies across nine stores of the Consortium's Founding Partners — CVS Health, Target and Walmart — in Northern California (Palo Alto, East Palo Alto, Mountain View, Redwood City & Santa Clara). The pilots were an essential step to test and improve solutions, incorporate customer and retailer feedback, and explore pathways to scale.

APPROACH

Across the Founding Partners' select stores, customers were able to sign up and try these new solutions, whether it was to borrow, be incentivized to, or receive reminders to use a reusable bag. Together, we were able to observe customer interactions and learn alongside employees to identify opportunities for service improvements.



THE INNOVATION JOURNEY TOWARD IN-MARKET PILOTS

How did we prepare for the multi-retailer pilots?

The Consortium to Reinvent the Retail Bag, in partnership with the global design firm IDEO, worked together to prepare for the in-market pilots. This effort is one part of the Consortium's complementary workstreams, which span advancing materials recovery, identifying best practices for policy and engaging consumers — all underpinned by work with key stakeholders across the entire bag value chain.



DESK RESEARCH UNDERTAKEN

Expert conversations and desk research identified the history, emerging policy and future trends surrounding plastic bag use, summarized in the [A New Way Home Report](#).



INNOVATION CHALLENGE LAUNCHED

A worldwide open call for sustainable innovation welcomed 455 applicants with new bag designs, from 60+ countries.



WINNING INNOVATORS SELECTED

Submissions were carefully reviewed by materials recovery experts, retailers, investors and other industry leaders to select the final innovations. A total of nine winning teams received funding: 6 Reusable / Enabling Technology solutions and 3 Innovative Materials solutions.



ACCELERATOR ACTIVATED

Nine winning teams participated in the Beyond the Bag Accelerator. Explorations spread across product and service design, technology development, branding and communications, recovery testing and pilot preparations.



PROTOTYPING COMPLETED

Retailers received product samples, tested them across their innovation labs and collected vital feedback from their teams to identify key areas for pre-pilot iteration.



PILOTS PREPPED

Innovators quickly redesigned and adapted their apps, hardware and service models for store-readiness. Retailers trained and readied their teams for deployment.



PILOTS STARTED

Select CVS Health, Target and Walmart stores piloted solutions across stores. Innovators researched product-fit and iterated.

IN-MARKET PILOTS IN ACTION

What did pilot execution look like on the ground?

GOALS

- Learn about operational fit by introducing solutions in stores, exploring employee interaction and spatial and flow realities in the built environment
- Learn about customer appeal by allowing organic interaction with solutions across the shop floor
- Learn about collaboration and exchange by promoting the availability of solutions across retailers, and observing bag movement between retail stores
- Identify, build and test the most impactful product and service changes

9RETAIL
LOCATIONS**6-10**WEEKS OF
TESTING**4**REUSABLE BAG
SOLUTIONS TESTED**5**CITIES
TESTED**1**STATE
TESTED

WHAT WE DID

Who was involved in the pilots?

CONSORTIUM MANAGING PARTNER



CONSORTIUM FOUNDING PARTNERS



INNOVATION PARTNER



INNOVATOR SOLUTIONS

We piloted four winners of the Beyond the Bag Challenge across select stores of our Consortium Founding Partners.



CITIES

We tested within the following municipalities, and collaborated with some of these Cities who supported pilots through promotion, local business enrollment and cross-sharing learnings.



Meet the innovators



Fill it Forward has created a physical tag to affix to reusable bags customers already own, and an app to motivate customers to reuse those bags for charitable donations and environmental impact.



TAG + PACKAGING

APP



GOATOTE has designed a kiosk-based reusable bag service for customers who frequently forget to bring their reusable bags.



BAG

KIOSK

RETURN

APP



ChicoBag has created a bag rental service for customers who discover they have forgotten a reusable bag at checkout.

99Bridges has created a digital backbone to track reusables enabling inventory transparency, customer reuse engagement, and the ability to earn and redeem rewards.



BAG



RETURN



APP

PARTNERSHIP

Two of our Beyond the Bag Challenge winners teamed up to pilot together in our Founding Partners' stores.

ChicoBag's service enables customers to borrow reusable bags on-site and get rewards for each reuse, and 99Bridges' Mosaic App helped power their system.

Where did the pilots take place?

CHOOSING THE BEST LOCATION FOR CUSTOMER-FACING PILOTS

This region of Northern California was selected for a variety of reasons, including density and representation of retail partners' stores within a core "cluster," supportive regional policy and market readiness.

NORTHERN CALIFORNIA PILOT LOCATIONS

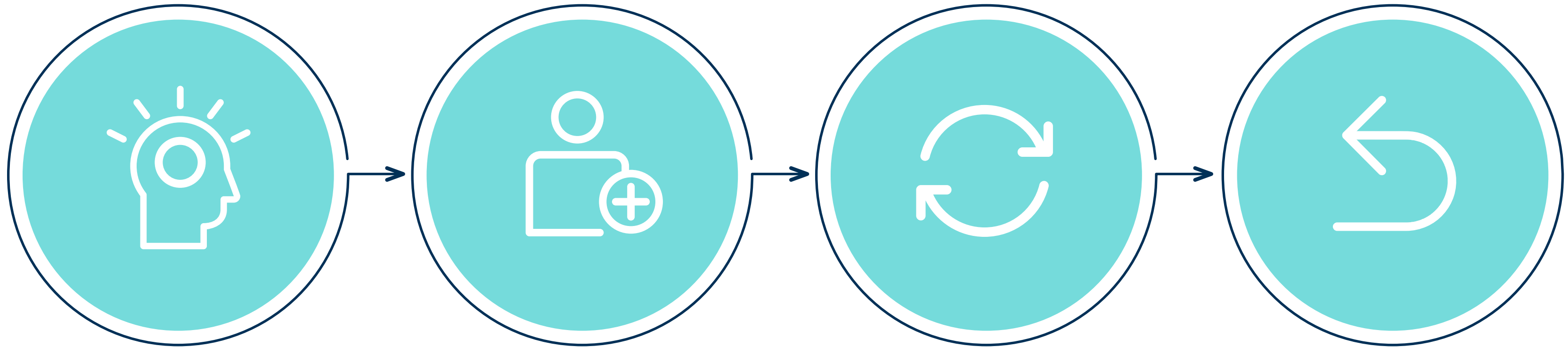
SECTION 2 WHAT WE LEARNED

Learnings From Across the Reuse Journey

The key moments universally applicable
across reusable bag services



What does the customer-facing journey look like for reusable bag services?



AWARENESS

The moment, or series of moments, a customer discovers a service

ADOPTION & SIGNUP

The moment the customer decides to take the necessary steps to sign up for and use a service

USE/REUSE

The moment an item is used, and then reused, whether by the original customer or another customer

RETURN

The moment a customer returns an item to the service provider after use/reuse, for sanitization, processing and restocking

These key journey moments are universally applicable across reusable bag services. These moments may take different forms and add additional steps as needed by individual use cases and solution types.

AWARENESS

The moment, or series of moments,
a customer discovers a service



 **Fill it Forward.**
Always Giving

GET YOUR
FREE
BAG TAG HERE

WHILE PILOT LASTS



 **Fill it Forward** x  **Beyond the Shelf**

Use your reusable bags to

**Give Back &
Earn Rewards**

Attach to your reusable bag

THE CUSTOMER JOURNEY

AWARENESS**LEARNINGS**

Customer awareness is a process worth investing in, because the success of the rest of the journey hinges on this first step

Placement of reusable bags and signage in store is key, but a larger campaign and brand story is needed to address the challenge of behavior change in retail

Most customers only think about their need for a bag as they are beginning the process of checkout

RECOMMENDATIONS**MAKE THE BETTER CHOICE OBVIOUS**

Retail stores are highly stimulating, packed environments that create competition for customer attention and high social pressure to keep moving through stores. **Awareness requires a clear value proposition paired with a punchy, colorful and emotional story.** Prioritize provocative and emotionally resonant messaging over informational messaging.

MAKE REUSE BRANDS MORE ATTRACTIVE

Most ecologically motivated customers are already on board with reuse, but other customers need greater encouragement and reminders. For shoppers that prioritize quality, convenience and cost, the reuse story also requires **more punchy and catchy design and messaging, smoother retail systems integration and better financial incentives in order to increase desirability.**

CREATE WELL-TIMED AWARENESS

While breadcrumbs throughout the shopping journey help build familiarity and awareness, **the moment that matters most for connecting awareness to adoption is checkout.** Prioritize solutions that target awareness at checkout over other moments in the user journey.

THE CUSTOMER JOURNEY

AWARENESS



CASE STUDY

How Customer Feedback Shaped Design

FROM

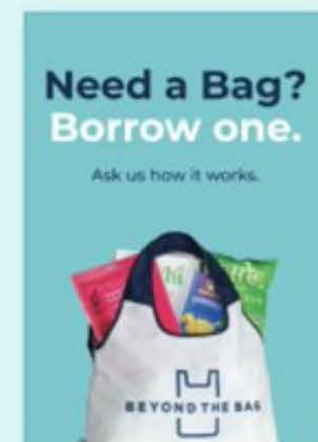
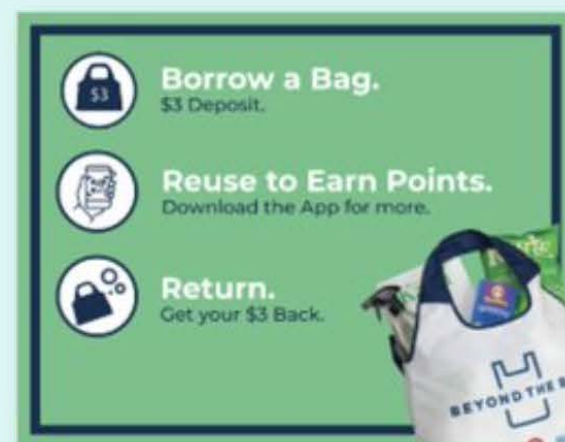
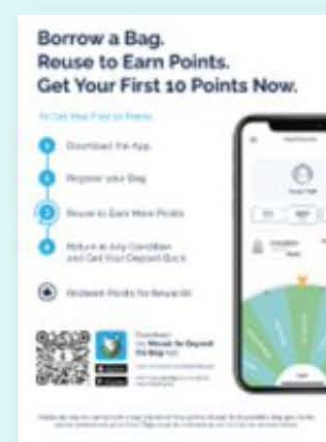
Informational,
Comprehensive

TO

Emotional,
Clear next steps



WEEK ONE



WEEK TEN

Innovators: ChicoBag & 99Bridges

During the Beyond the Bag Pilots, ChicoBag and 99Bridges continuously iterated their messaging, testing out what resonated and what didn't. Across three iterations, they found that leading with the "why" for reuse was more effective at grabbing a customer's attention, rather than leading with the "how." Survey data during in-store experiences indicated progressively higher levels of customer understanding as signage evolved into more colorful signs, using simple messaging that spoke to customers' emotions and needs.

ADOPTION & SIGNUP

The moment the customer decides to take the necessary steps to sign up for and use a service



NEED A BAG?
WE HAVE YOU COVERED



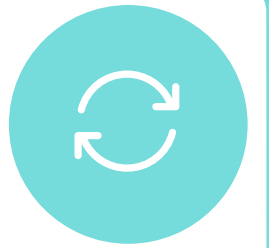
“
I wish this was as
easy as just swiping
a credit card.”

— CUSTOMER, PARTICIPANT IN
THE BEYOND THE BAG PILOTS

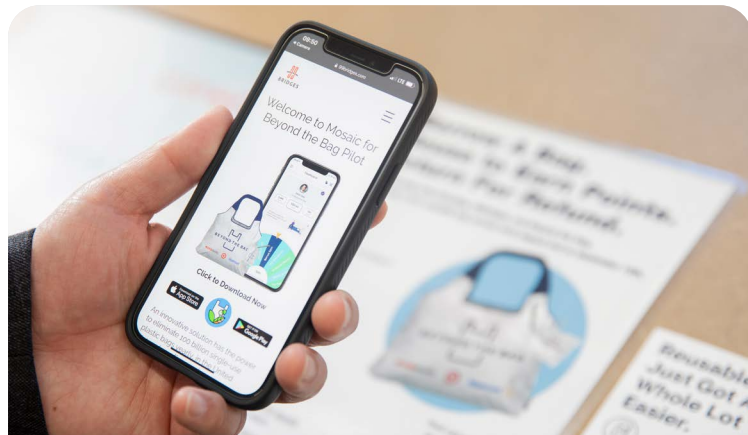
DOWNLOAD THE GOATOTE
APP FROM THE APP STORE

THE CUSTOMER JOURNEY

ADOPTION AND SIGNUP



FOUR FACTORS HEAVILY INFLUENCE RATES OF ADOPTION FOR REUSABLE BAG SERVICES:



Signup

Signup needs to feel easy



Placement

Signage placement is critical



Price

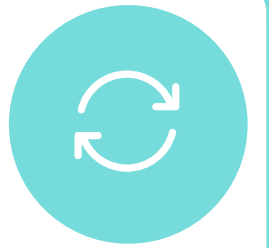
Price feels reasonable



Champions

Employees are key champions of reuse

THE CUSTOMER JOURNEY

ADOPTION AND SIGNUP**LEARNINGS**

For broad adoption, signup for reusable bag services needs to be just as fast and easy as getting single-use bags at checkout

This is important for managing impact on checkout flow and queue wait times, but also for customer expectations and patience before abandonment.

Eliminating steps or exploring app-less options for reusable bag services is key for shoppers who are not willing or able to use apps to access the product or rewards

To reduce friction that inhibits adoption, the digital experience should supplement the bag, rather than dictate one's experience with the bag.

Digital experience is best as a way for customers to go deeper into reusable offerings, not as a requirement

RECOMMENDATIONS

1

**Signup
needs to
feel easy**

Multiple modes of entry help to frontload awareness, and takeaway cards or digital experiences help to clarify details, so that checkout time can be focused on the most relevant action for enrollment — providing the customer with a bag.

There is an opportunity to reduce friction by designing multiple modes of entry into a reusable service, which include a primary app-less, streamlined payment experience. Integration into retail point of sale and return systems is integral to creating this frictionless experience.

Beyond a primary, frictionless mode of entry, there are several areas a digital application can allow customers to dive deeper into the reusable bag experience:

- Tell the story of the bag
- Motivate reuse through rewards, environmental storytelling and social engagement
- Remind and inform customers of reuse and returns when necessary

THE CUSTOMER JOURNEY

ADOPTION AND SIGNUP



CASE STUDY

How Ease of Signup Process & Point of Sale Integration Impacts Uptake

SCENARIO ONE

Signup required customers to enter credit card information and redirect through multiple platforms to do so.



1 OUT OF 6 SHOPPERS WERE ABLE TO COMPLETE ADOPTION WITHOUT ASSISTANCE

“For me, this signup process is taking too long. Normally I would have already given up. I can’t imagine that anyone would stand here in the middle of the store, and take the time to do all this.”

- SHOPPER IN BEYOND THE BAG PILOTS

SCENARIO TWO

Signup was integrated into point of sale, and was readily available at checkout.



4 OUT OF 5 SHOPPERS WERE ABLE TO COMPLETE ADOPTION WITHOUT ASSISTANCE

“I was glad that the bag just worked like a regular product. It was so easy — I loved that. When I saw the QR code on the sign, I got nervous that I would have to download an app at checkout. I hated that feeling. I don’t want to hold up the line.”

- SHOPPER IN BEYOND THE BAG PILOTS

Insights

One of the key differences among the reusable bag systems piloted in this initiative was whether adoption and signup were integrated into point of sale (POS), or whether adoption and signup required customers to download an app, enter their credit card information and redirect through multiple platforms to signup and adopt a reusable solution.

While pitches by employees had a significant impact on adoption, deep dive interviews with shoppers, as well as on-the-spot interviews, suggest that ease of signup process and POS integration also had an outsize effect on rates of adoption for both scenarios during the pilot.

Price was not observed to be a major differentiating factor for adoption between lending and deposit models — all piloted bag designs and pricing models were perceived as being reasonable among cost-conscious and quality-conscious “reusers”.

THE CUSTOMER JOURNEY

ADOPTION AND SIGNUP**LEARNINGS**

→ Most shoppers who forget a reusable bag start thinking about bags as they approach checkout

→ Checkout is a challenging time to educate, but it is the moment when reusable offerings are most needed

For quality conscious and rewards-motivated shoppers:

Product placement earlier in the shopping journey in store may be effective for customers who are seeking to upgrade their reusable bag, prefer to use a bag to carry goods in store, or have an eye for signage about deals.

For shoppers forgetting a reusable bag and habitual single-use bag shoppers:**RECOMMENDATIONS****2****Signage placement is critical**

In-store signage should build awareness of new reusable bag offerings throughout a customer's journey, culminating in access to reusable bags at the point of sale, when customers are most aware of their need for bags and of how many they will use. Reusable bag offers should be readily accessible at or very near to checkout, and should also require minimal time to learn about and signup for at this moment.

THE CUSTOMER JOURNEY

ADOPTION AND SIGNUP**LEARNINGS**

Pricing perceptions around reuse solutions are strongly rooted in present-day parallel offers

In the Beyond the Bag Pilots, all interviewed customers were asked to provide price tolerances for reuse solutions offered. When asked why they felt the way they did about pricing of solutions, 100% of interviewees anchored their rationale in relation to existing product offers. Customers anchored their value perceptions in one of three places: the cost of plastic and paper bags, the cost of cheap reusable bags, or the cost of high-quality brand name reusable bags.

Pricing can help communicate a preference for an intended behavior whether that is 'reuse' or 'return'

When and where a financial incentive or penalty is deployed along the reuse journey can impact customer behavior, potentially encouraging either reuse or return.

While customer education was a challenge throughout the pilots, we saw that different pricing models can help to communicate to customers how to best engage with a service.

Customers approach both deposit and penalty pricing from a 'worst-case scenario' perspective

When evaluating whether or not to adopt a reusable option, customers jump to 'what's the worst that could happen?'

Deposit and penalty pricing should feel reasonable based on customers' expectations so that customers aren't deterred from enrolling in a reusable bag service from the outset.

RECOMMENDATIONS**3****Price feels reasonable**

The perceived value of a reusable bag service is an interdependent variable based on numerous different factors, including a customer's benchmark of parallel offerings, the branding, design and format of the bags, and the value tied to the level of effort to participate in the service (e.g., what does returning this to the store involve). Overall, we found that customers are generally skeptical of free offerings, but pricing that incorporated the aforementioned factors made customers feel that they are getting a reasonable deal.

THE CUSTOMER JOURNEY

ADOPTION AND SIGNUP**LEARNINGS****Timing of awareness matters for adoption**

Employees can raise awareness in the moment that matters most for customers forgetting to bring their own reusable bag

We observed that individual employees could have an outsized impact on rates of adoption — both positive and negative

Employees like to craft their own messaging to encourage the uptake of reuse models, but they also appreciate support

RECOMMENDATIONS

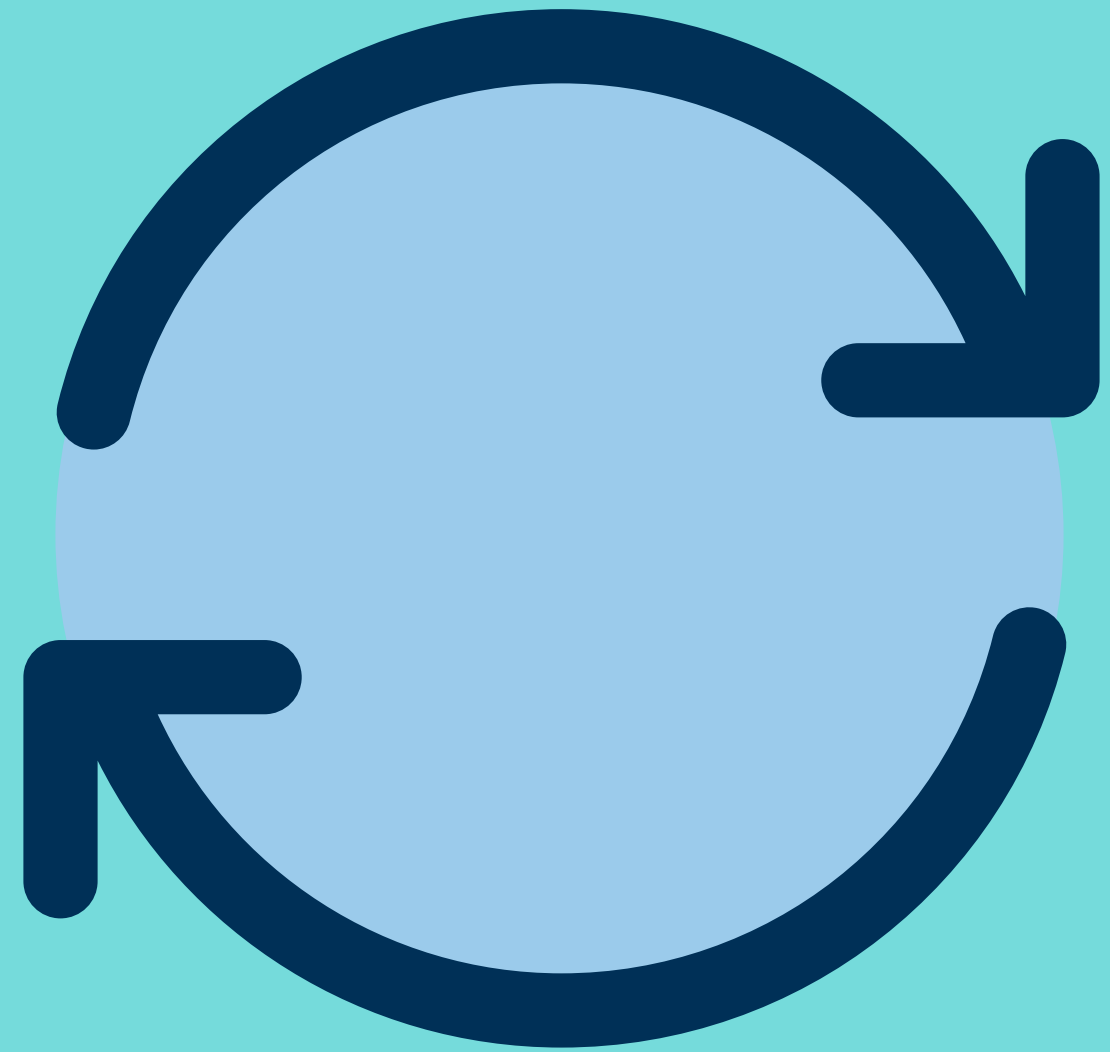
Employees are key ambassadors and champions to accelerate the uptake of reuse programs. Engaging and supporting employees with coherent messaging and supplementary educational resources on reuse programs will help them articulate the value proposition quicker and be more effective in their pitching.

4

Employees are key champions of reuse

USE/REUSE

The moment an item is used, and then reused, whether by the original customer or the next customer





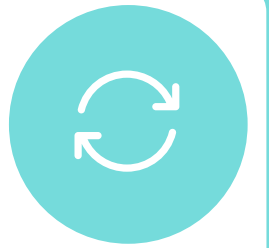
“

I go to all of these stores. If I can get rewards for all of these, I would be very interested.”

— CUSTOMER, PARTICIPANT IN
THE BEYOND THE BAG PILOTS

THE CUSTOMER JOURNEY

USE/REUSE



LEARNINGS

Different shoppers respond to different incentives for reuse

Customers vary across a range of perspectives on what is most important and what motivates them to participate in a reuse system.

RECOMMENDATIONS

- Financial incentives, such as a purchase discount, were highly motivating in the stores where solutions were tested
- Emotional resonance around having an impact, either environmental or charitable, was the second leading incentive
- Shared experiences, whether through an in-app competition or participating with loved ones, also received positive responses

Reuse services are more convenient when offered in more than one location and with more than one brand

Many customers engaged with the reusable bag services in places different from where they originally enrolled. Customers frequently cited an appreciation for this benefit which makes reuse easier at locations they already frequent.

- Customers would benefit from clarity on where reusable bags can be “borrowed and returned,” and from consistent experiences across stores

Reducing friction in the customer reuse experience is key

Simplicity supports adoption. Each additional demand of customers to search for instructions, learn new behaviors, navigate new processes and take additional steps reduces their interest in participating in reuse.

- Integration into existing systems such as point of sale or matching familiar experiences helps customers move through shopping flows uninterrupted
- Processes should be automated as much as possible so that a customer has fewer active roles to play in initiating or remembering to reuse
- The effort associated with the return of reusable bags should be minimized since customers take this into consideration at purchase

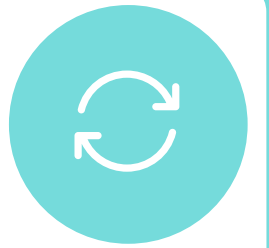
Aesthetics and endurance of reusable bags matter

Damage and stains matter when it comes to a customer’s perception of cleanliness. Customers noted concerns about damage that could compromise the structural integrity and performance of bags, thus lowering the perceived value for the deposit or fee the customer had paid. Customers also expressed concerns about visible stains that could indicate food residue.

- Bag design can get ahead of customer concerns by proactively offering reassurance of cleanliness in text labels, and patterns or darker colors can mitigate perceived hygiene challenges

THE CUSTOMER JOURNEY

USE/REUSE



LEARNINGS

The value of reducing negative environmental impact is highly motivating for customers to reuse

For some, it's already enough:
"I already bring a bag everywhere I shop. The financial reward is nice, but I've been bringing my own bag to stores for twenty years. I am not doing this for the money."

Others want to be reminded and encouraged by messaging in both product and digital experiences:
"I want a bag with leaves on it that reminds me of why I am doing this. I kind of want the app to say 'Good job'."

→ Financial rewards may be more broadly motivating — this is what most shoppers are 'looking for' at retail

"I have thought about this a lot, and it's really the cost saving that's most important to me. Ecological impact is important, but if it has rewards I will do it for sure."

53%

OF CUSTOMERS NOTED THAT FINANCIAL REWARDS WERE THEIR PRIMARY MOTIVATOR

→ For those not motivated by financial rewards or environmental impact, emotional connection to a product can be a reason to reuse because it elevates the desire to be seen reusing a product

"I want a cool looking bag because it needs to be something that I will want to carry with me."

"My favorite bags probably have more to do with the graphic design on them than anything else."

However, innovators must also navigate the balance of creating a product that is too "cool," meaning that customers don't want to return it, instead keeping it as a "souvenir," which brings challenges for incentivizing reuse within a "borrowing" system.

→ For convenience-focused shoppers unmotivated by any of these — policy changes may shift market dynamics to incentivize more sustainable behavior

"Sorry — no. I don't have time to learn about this."

Reusable bag service designers should balance the need for an appealing brand and visual identity with the risk of creating souvenirs that don't get reused or returned to the system

RETURN

The moment a customer returns an item to the service provider after use/reuse, for sanitization, processing and restocking





“

This feels pretty easy — I can see where to drop the bag. I feel like I know what to do.”

— CUSTOMER, PARTICIPANT IN THE BEYOND THE BAG PILOTS

THE CUSTOMER JOURNEY

RETURN

LEARNINGS

Providing quick confirmation and rewards encourages returns

A frictionless experience for customers still matters when it comes to returns

Bulk returns are tied to bulk rewards that incentivize action

Offering return “wayfinding” helps with clarity for customers

RECOMMENDATIONS

Returning a bag after multiple uses is a significant milestone for customers that requires premeditation and additional effort in-store. It should be rewarded as such. In particular customers seek:

- Clear confirmation of a return, to be reassured that they won't be penalized for a late or missing bag
- Quick receipt of the promised reward to understand that no further action is required. Immediate delivery of the “carrot” reduces confusion and ambiguity and correlates the return action with positive feelings.

As with reuse adoption, returns benefit from simplified, automated and easy processes that reduce action for customers and flow with typical shopping experiences, rather than requiring a significant or time-consuming deviation. The traditional returns process for merchandise often requires customers to find a customer support center or bring back a receipt. This standard in-store return process is too burdensome for a ~\$3 item. In reusable services, there is an opportunity to improve upon this process and bring delight to the customer.

The relatively small reward for a single return isn't always enough to inspire action. Bulk returns tied to bulk rewards can help customers anchor on a reward more meaningful in size for the effort needed to claim it. Some customers developed this “bagstash” behavior pattern organically, and it may be worth exploring further how communicating this opportunity to customers impacts uptake. However, hoarding can create challenges for inventory projections and accounting cycles, so defined timeframes should be considered to keep bags in active circulation.

Interestingly, “bagstashes” also open up an opportunity to activate “collectors,” individuals in the community or in a family who have the motivation to take on gathering and returning to offer convenience for other users in exchange for their rewards.

Customers can be made aware of return locations through signage or information on the bag. More experimentation can help identify the clearest and most accessible way to communicate return locations to customers, both in a community and within a store. In consideration of the evolution towards potential app-less experiences, integration into other services or mapping apps may be worth exploring.

THE CUSTOMER JOURNEY

RETURN



LEARNINGS

Customers need to know during signup and adoption where to return bags after multiple uses

Customers are curious about how their returns are logged when tech is too hidden (or doesn't exist where presumed to)

RECOMMENDATIONS

Adoption and signup is an important first moment to mention both the process of return and the location, to then be followed up with details in the digital experience for customers who seek it. When bags are sold at checkout, it may be unclear to customers that a return should happen at another point in (or outside) the store. When seeking to return a bag, customers may naturally return to the point of first encountering the bag — if signage and other communication methods have not made a different location abundantly clear.

With primarily high tech tracking present in their lives in the form of phones and wearables, customers were curious about the approach to tracking an object as simple as a bag. Customers had many questions about how this was accomplished and what other personal information might be tracked, particularly when they couldn't find a tracking device themselves due to the bags construction to conceal RFIDs. This can be addressed through transparency in communications — what is being tracked, how this is accomplished and why this is necessary for a reusable bag service.



THE CUSTOMER JOURNEY

RETURN

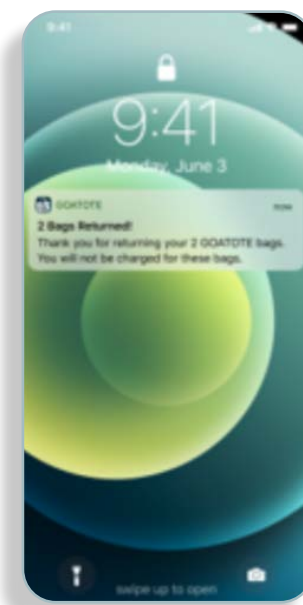


CASE STUDY

How the Digital Experience Can Motivate Reuse and Returns

Customers have different levels of motivation to complete digital interactions for a reusable bag. Retailers and innovators can continue to rightsize technology requirements to match the level of complexity that feels appropriate for customers and supports an appropriate price point for startups. The digital experience can be a tool to remind and motivate returns. This might include:

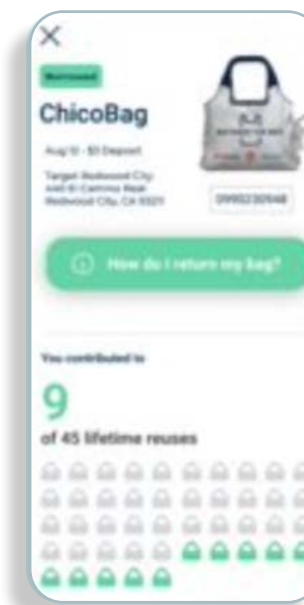
- Fewer scanning devices/actions due to in-store tech integration
- Fewer signup and payment steps due to integration with retailers' points of sale
- A simplified digital return process for a used bag
- In-app reminders for reuse and returns
- Push notifications after a set amount of time from bag checkout or based on proximity to stores
- Customer-set self-reminders within a calendaring feature linked to regular shopping trips, that send email reminders



GOATOTE's confirmation notifications for returns



Fill it Forward's app-less web experience for first time users



ChicoBag's in-app return instructions

What are typical technologies deployed to enable reuse?

QR CODE vs BARCODE vs RFID

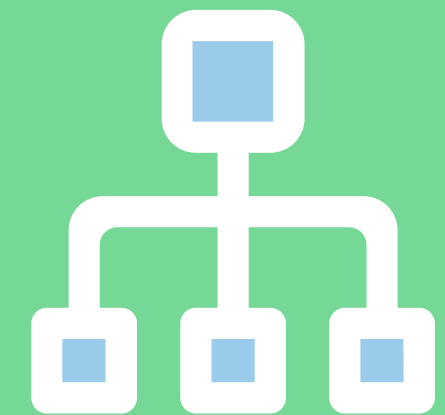
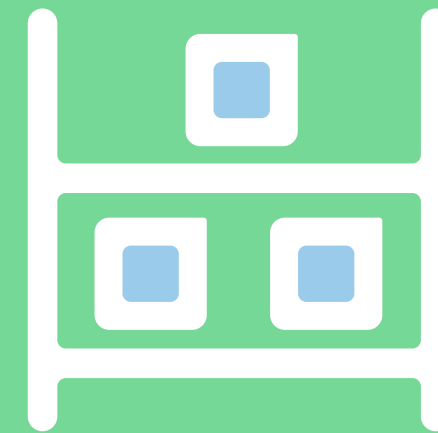
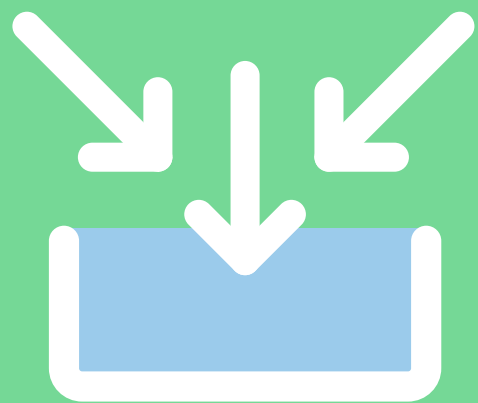
While there is still room for exploration of passive reuse event tracking through sensors and triangulated data, for an active customer scan, QR codes are preferred. QR codes have become a ubiquitous and familiar medium due to contact-less services introduced during COVID-19. Where barcodes are presented, they can be confused for purchase SKUs, adding to customer and employee confusion and frustration, and ultimately impacting reuse completion and app engagement.

Custom-designed QR codes unique to a particular brand can help to draw attention to the scanning opportunity and make reuse more memorable.

An RFID allows for automatic or passive scanning and tracking, as well as the very important benefit of bulk scanning — meaning an entire box or pallet of items can be scanned at once, saving valuable inventory processing and logistics time.

BEHIND THE SCENES

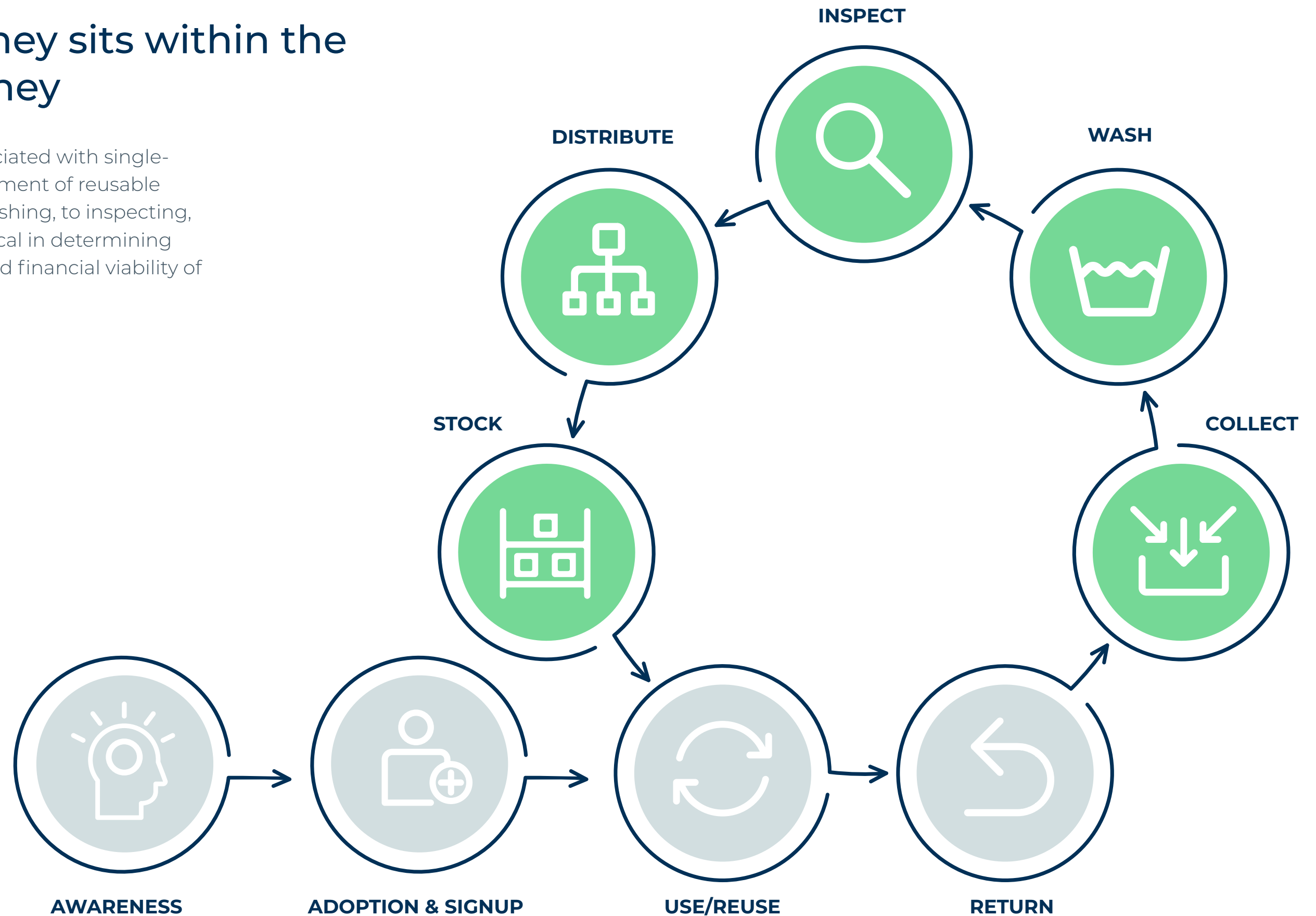
Beyond the customer-facing journey, there are key nodes for collecting, washing and redistributing reusable bags to the next customer



BEHIND THE SCENES

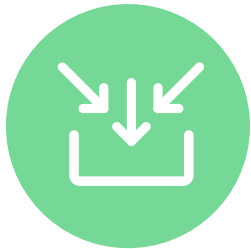
The customer journey sits within the broader reuse journey

Reuse requires steps not typically associated with single-use alternatives. Logistics and management of reusable bags post-use — from collecting, to washing, to inspecting, distributing and re-stocking — are critical in determining the long-term social, environmental and financial viability of reuse models.



BEHIND THE SCENES

There are many opportunities behind the scenes to enhance impact by improving environmental and operational procedures



Collect

Streamlining service nodes and processes, such as bundling reusable bag pick up and drop-off, will reduce the costs and environmental impact of managing cleaning and return reverse logistics, including carbon impacts of transportation.

FOR FURTHER EXPLORATION

- Explore partnership opportunities to integrate into existing waste management collection routes and/or to leverage empty trucks that leave retail locations every day



Wash

Washing is currently comprised of largely patchwork, temporary solutions. To minimize resource impact and create consistency for measurement, the reuse economy should work with key partners to scale up this much-needed service. Economies of scale factor in here, with both resource and economic benefits seen at higher volumes.

- Standardized washing methodologies could help this service scale more quickly
- Consider ways to incentivize the market to meet these needs



Distribute

Distribution centers should prioritize optimization strategies and tools, for example using renewable energy, consolidating batches and distribution routes of reusable bags, and encouraging shared structures around inventory and data management.

- Evaluate co-location and consolidation opportunities, for example distribution should ideally happen with another event (e.g., weekly stock distribution is an opportunity to collect dirty bags and drop-off clean reusable bags)



Stock

Design innovation will be critical to ensure that retail operations will not be impeded but enhanced by reuse. Today, reusable designs can take up a lot of space and are hard to “demand plan” for because we don’t know when a customer will reuse their product. With time, we anticipate that design will improve (e.g., nestable reusable cups) and we will need less stock because reuse is the common behavior.

- Encourage design innovation to prioritize compactness and easily nestable reuse designs that take up minimal space when stocking in stores

BEHIND THE SCENES

CASE STUDY

Evaluating Material Selection Choice for Reuse Systems



During Closed Loop Partners' NextGen Consortium's reusable cup pilots, many customers enjoyed the "premium" and "improved" experience of drinking from durable stainless steel cups, but the potential tradeoffs associated with sourcing and producing steel must be considered when analyzing overarching material choices. Learn more about the NextGen Consortium's insights on material selection choices [here](#).



When choosing the materials to manufacture reusable bags with, whether it's cotton for tote bags or plastic for bags with a thickness of at least 2.25 millimeters, similar material tradeoffs must be considered. For example, conventional cotton production requires a lot of pesticides and fertilizers, water and land, resulting in environmental contamination and degradation, and other impacts during production.

All materials used for reuse systems have an environmental footprint. Calculations of how energy intensive the material is to extract, the cost to business, the durability and recoverability of a material after use, and customer convenience and delight need to be weighed before design and production begin. The number of times reusable packaging is used ties directly to its environmental impact, as does its end-of-life pathway. Even the most durable reusable packaging will require decommissioning after many uses, so **designing for recyclability is critical.**

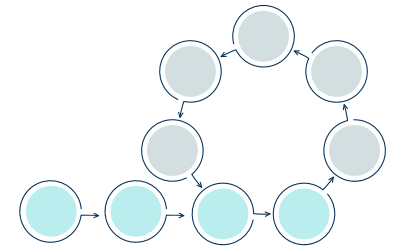
KEY TAKEAWAYS



KEY TAKEAWAYS

Key takeaways from the customer experience

There are four key steps to a reusable bag system that apply across solution types:



1 AWARENESS

Effective storytelling is foundational for building awareness

Punchy, colorful and impact-oriented messaging is essential to engage customers

Attention is hard to come by amidst abundant signage and product both in aisles and at checkout. Customers on a mission for premeditated purchases are not in an exploratory state of mind and can easily bypass new offerings. A strong and clear value proposition helps capture attention and build awareness.

“At this moment in the shopping trip, I was thinking about, ‘okay, where are the groceries, what aisle has what I want? I didn’t even care for this signage much. Yeah I was blindfolded — I guess my blinders were on. I just zipped past the kiosk.”



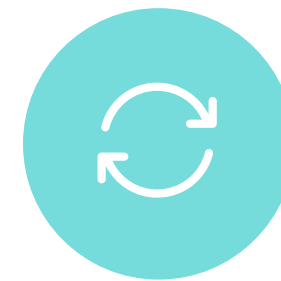
2 ADOPTION & SIGNUP

Convenience is king when it comes to adoption and signup

Reuse needs to be just as easy as the single-use option

Customers expect signup to be easy and match the ease and speed of the retail experience they are moving through in parallel — browsing or checkout — as they work swiftly to finish their shopping trip. The social pressure of a long line and the stress of navigating self-checkout technology compound. Forming a relationship with a new service via signup also brings up hesitation around trusting vendors with personal data.

“When I was checking out, it completely went out of my head. There was a line behind me, and I wanted to just get in and get out. So I pretty much completely forgot about it [the new reuse offering].”

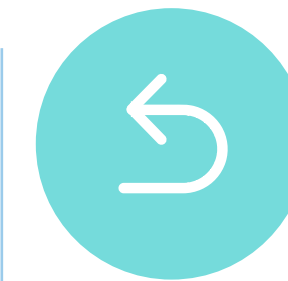


3 USE/REUSE

Customers are looking for a clear and easy reason to help them remember to reuse
There are two kinds of motivations — rewards and environmental impact

Reuse requires premeditation. Customers are looking for a clear and easy reason to reuse to help them remember. There are two kinds of motivations — rewards and environmental impact. A familiar model offered up as an analogy, such as a rewards membership, helps customers to understand the offering more quickly.

“It would be interesting to know more information about what happens when they reach their reuse goal.”



4 RETURN

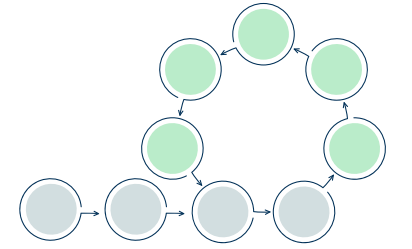
Accessible drop-off points and quick confirmation of return help build trust in the reuse system
Ease of returns is a key factor for customers as they consider reuse

Customers factor in the task of returning their reusable bag when considering engaging in a reuse service system in the first place. Therefore, availability, accessibility and ease of drop-off points for returns are key, alongside instant verification that returns have been successful, so as to build confidence in the system. Reuse solutions should minimize the responsibility of return on the customer, as it can be a barrier to adoption.

“For me, returning the bag depends on how widely this program is run. I made a one-off trip to Walmart today.”

KEY TAKEAWAYS

Partnership and scale behind the scenes



PARTNERING WITH THE RIGHT STAKEHOLDERS MATTERS

Partnerships across the value chain directly impact the sustainability of reuse

Many of the potential boosts to environmental sustainability come from external partners that a reuse innovator can choose to work with, including washing partners and cleaning agents, delivery and data storage partners managing greenhouse gas emissions, and material suppliers sourcing from responsibly managed sustainable resources.

IMPACT MUST BE MEASURED AT EVERY STAGE

Whether percentage of reusable bags recovered, water and energy usage, and damage or loss rates, data must be gathered at every stage of the journey

Without making data-backed decisions, we risk unintended consequences. When addressing global waste challenges, many factors must be considered when measuring impact and success, from scale to material selection choice, to the number of times a product is reused. What we don't want to do is replace all of the world's existing single-use plastic bags with the same number of reusable bags. Reusable bags need to be reused in order to have their intended impact, and it's critical that we have the means to measure this metric in place.

FURTHER SCALING REUSE SYSTEMS WILL HELP CATALYZE EFFICIENCIES

As reuse grows, so do opportunities for shared infrastructure and other collaborations that can help optimize systems

Reuse systems come with net new variables that are not currently factored into the impact of single-use systems. Broad adoption of reuse systems, such as for the plastic bag, will provide opportunities for resource-use efficiency at scale, which will be necessary to ensure these options are truly better for the environment.

SECTION 3 HOW TO SCALE

Partnerships Accelerating Scale

Best Practices for Replicable
Multi-Retailer Reuse Programs





“
**The biggest question we
get from customers is
where else can I use this?”**

– RETAIL STORE MANAGER, PARTICIPANT IN
THE BEYOND THE BAG PILOTS

“
**Can I get the bag here, and
still return it and get my
money back when I go home
to Florida? I would do that!”**

– CUSTOMER, PARTICIPANT IN THE BEYOND THE BAG PILOTS

COLLABORATION

The opportunity

Collaboration is a key enabler of scale. The Beyond the Bag Pilots were first-of-a-kind multi-retailer pilots with CVS Health, Target and Walmart banding together to test reuse across nine stores. The interplay among leading retailers' stores sets an exciting precedent where customers could borrow a reusable bag from one store and drop it off at another retailer.

Ultimately, collaboration is the key to unlock pathways to scale reuse systems, and transition from our wasteful linear system to a future built upon circular systems that are affordable, convenient and protect the environment we share.

THERE ARE NUMEROUS AREAS FOR COLLABORATION ACROSS RETAIL BUSINESS OPERATIONS TO HELP REUSE GROW, INCLUDING:



Incentives

Rewards Systems,
Discounts,
Charitable Giving
Programs



Customer Experience

Consistent Customer
Journey (e.g., Signage
Placement, Location
of Drop-off Sites for
Returns)



Branding

Reusable Product
Design, Logo Use



Marketing

Media, Social
Media,
Messaging

COLLABORATION

Our approach to systems change

In the Beyond the Bag Pilots, we explored how working across multiple retailers can help drive reuse behavior at scale, shifting from singular incentives applied to specific retailers (e.g., a discount for bringing in reusable packaging) to a suite of interventions that can build on each other across different retailers to collectively reduce barriers to adoption and reuse. Two elements we intentionally considered in the design of the multi-retailer pilots were:

- 1 **Universality:** where can the reuse experience be the same across retailers?
- 2 **Additivity:** how can multiple interventions build on each other through the steps of awareness, adoption, use/reuse, and return to promote reuse behavior?

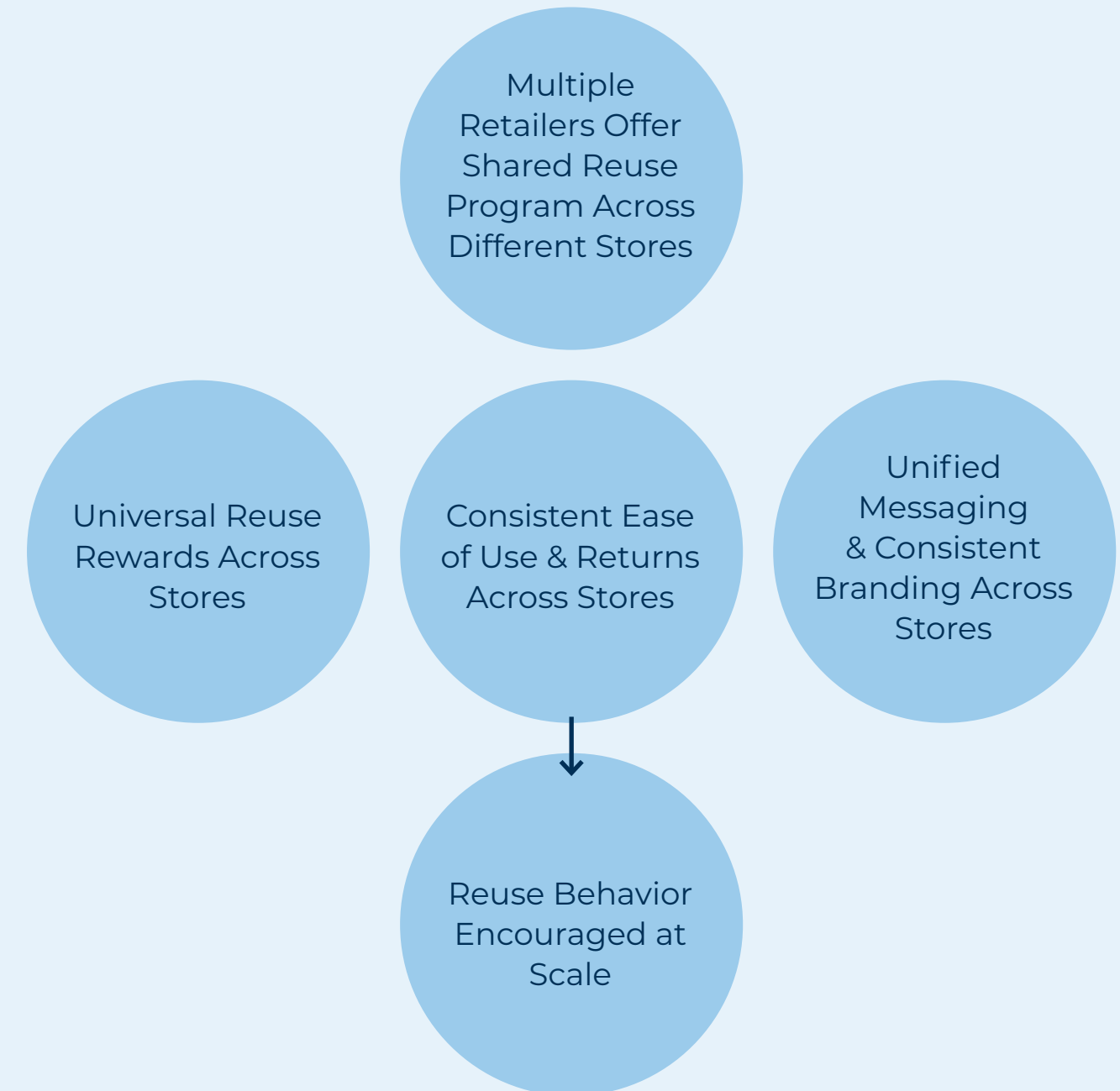
Specifically, we asked:

- How should solutions show up and present themselves across multiple retailers in order to drive awareness faster?
- How might we create a suite of unified engagement opportunities across the customer journey in order to reduce barriers to adoption and encourage reuse?
- How might we integrate solutions into existing operations to create a seamless experience for customers, regardless of where customers discover the solution?

INDIVIDUAL RETAILER EFFORTS



UNIVERSAL INTERVENTIONS ACROSS MULTIPLE RETAILERS



COLLABORATION

What we learned

The multi-retailer Beyond the Bag Pilots positively impacted all aspects of the reuse experience — from awareness, to adoption & sign up, use/reuse to return.

CUSTOMER FEEDBACK

“**I saw this at Target, and CVS. I only decided to use it after seeing it here (at Walmart) as well.**”

“**I go to all of these stores. If I can get rewards for all of these, I would be very interested.**”

“**The biggest question we get from customers is where else can I use this?**”

“**For me, returning the bag depends on how widely this program is run. [...] This kind of kiosk has to be pretty much everywhere I shop.**”



AWARENESS

Seeing solutions available at multiple retail locations, especially at major brands, increases the level of trust customers have in new solutions. Consistent signage and messaging help convert customer interest to adoption.



ADOPTION & SIGNUP

Universality of solutions and tech integration across major brands' stores, and potentially other locations, helps increase the ease of adoption, especially when applied within a specific cluster or region.



USE/REUSE

There is increased perceived value of solutions, especially when tied to incentives that carry across major brands' stores, giving customers more chances to reuse and earn rewards.



RETURN

Availability of solutions across multiple retail locations increases the inherent value of the service. Customers find solutions easier to use, reducing the burden of 'responsibility to return.'

COLLABORATION

CASE STUDY

How Offering Universal Reuse Rewards Across Retailers Encourages Customer Participation

ChicoBag and 99Bridges designed and implemented a points-based rewards system that gave customers points every time bags were brought in and reused. The activation of reuse (store employee scanning the QR code/ RFID tag on the ChicoBag) and delivery of points within 99Bridges' Mosaic App were universal across participating stores for all customers. Customers could earn points across locations, logged at the specific site but aggregated in the app.

Points: In the pilots, points were not connected to retailer rewards or loyalty programs, but this is an opportunity for the future.



COLLABORATION

CASE STUDY

How Unified Branding Helps Educate & Excite Customers About the Availability of Reuse

The Consortium Founding Partners aligned on a design for a universal “Beyond the Bag” ChicoBag that displayed participating retailer logos from CVS Health, Target and Walmart. The Beyond the Bag-branded ChicoBag served as a promotional tool for pilots and a signal to customers about where bags could be reused for ‘points’ and returned back into the system.

“
You mean this works at all of these places?!”

— CUSTOMER UPON EXAMINING BAG

With clear representation of participating retailers, customers noticed and were excited by the fact that this bag service was available across multiple brands they frequent.



CONCLUSION



The Path Ahead

The Journey Continues

As you've read in this report, Closed Loop Partners, alongside our partners in the Consortium to Reinvent the Retail Bag, enthusiastically answered the call to confront the plastic waste challenge through our Beyond the Bag Initiative, launching a first-of-its-kind joint effort to test out reusable bag systems on the retail floor. The retail experience brings varied members of a community together in a shared space, making it a unique opportunity for retailers to reach, interact with and appeal to the public on environmental matters. However, the Beyond the Bag Pilots offered much more than a one-sided appeal, representing an unprecedented collaborative effort that convened diverse stakeholders as problem-solvers.

At a glance, this work underscores that systems change is contingent on participants reimagining relationships with one another, system flows, their perception of the retail bag and their own participation in the shift towards more circular models. This especially emerged in our Beyond the Bag Pilots when it came to retailers working alongside each other, versus siloed off from one another. Retailers are not only positioned to meaningfully confront and alter the course of the plastic waste challenge, but they also have the opportunity to truly engage around an issue that strengthens their involvement with the communities they serve.

We hope this work inspires and invites others across all industries to engage in collaborative and integrated

efforts to effectively move the needle on social and environmental challenges.

The pilots you read about in this report produced invaluable insights about what moving from linear to circular models requires. Although reusable bags were the focal point of this particular exploration, broader learnings from these pilots can be universally applicable across industries, models and reuse initiatives. The success of the Beyond the Bag Pilots signals the feasibility of reuse schemes in real time when there is enthusiastic collaboration, substantial customer and employee participation, seamless integration into existing flows and systems, emotional appeals, and frameworks to support ease of use and sustained buy-in.

Reuse is not the sole answer to material environmental challenges, and must complement multiple waste reduction strategies. After all, every reusable must be recycled at some point when it is past viable use. The success of reuse models depends on the right partnerships, contexts, sustainable material sourcing, displacement of existing single-use packaging systems and sustained follow-through behavior by the operator, retailer and customer.

With concerted and radically collaborative and innovative efforts, there is a tremendous opportunity for stakeholders to co-create a future designed to protect our shared environment, while integrating seamlessly with

and enhancing our existing daily activities. Co-created solutions where implementation is done right are the ones that will “stick” and create the broader shifts that are necessary for lasting change.

Looking forward, this change will require continued experimentation and testing to optimize reuse solutions. This report sets the stage for what's possible, showing that the key is in embracing constant co-learning, innovating, testing, iterating and pushing forward. As a global society, we can't afford to do anything less.

One step and bag at a time.



Thank you to all the partners in the Consortium to Reinvent the Retail Bag, as well as the cities, customers, supporters, and participating Beyond the Bag Challenge winners, who enabled us to bring these pilots to life.

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Photos of the pilot featured throughout this report are taken by Kelsey Floyd, kelseyfloyd.com

