

## **Appendix F**

### **Residential Recycling Survey**

# Monroe County Recycling Center Single Stream Conversion

- Single Stream conversion is complete
- Purpose of survey is to tap into attitudes and behaviors around recycling
  - Goal is ultimately to increase participation and maintain low contamination rates
- Booster shot to local recycling education and marketing as it relates to single stream
  - Collaboration among all participants is necessary for effective programs and enforcement support
  - Private companies, municipalities, customers, and public

# Residential Recycling Survey Summary

DRAFT



Prepared by BRX Global Research Services, Inc.

# METHODOLOGY

- The questionnaire was developed by Waste Management, Monroe County, and BRX.
- It was programmed for online administration by BRX and made available online.
- Harris Interactive, Inc. provided panel members to participate in the study.
- In order to qualify for the survey, respondents had to live in Monroe County, be age 18 or older and be able to answer a questions about their household's recycling.
- The survey administration period was 1/21/14 - 1/29/14. The survey period was closed when the targeted number of at least 800 completed surveys was achieved. (The actual number of completed surveys is 801.)
- The sample was very similar to the Monroe County population on age and geographic distribution, our two key population measures. Fifty-seven percent of the sample was between the ages of 35 and 64 as compared to fifty-two percent of the population according to Census statistics. Seventeen percent of the sample was from the City of Rochester, versus twenty-seven percent per the Census.

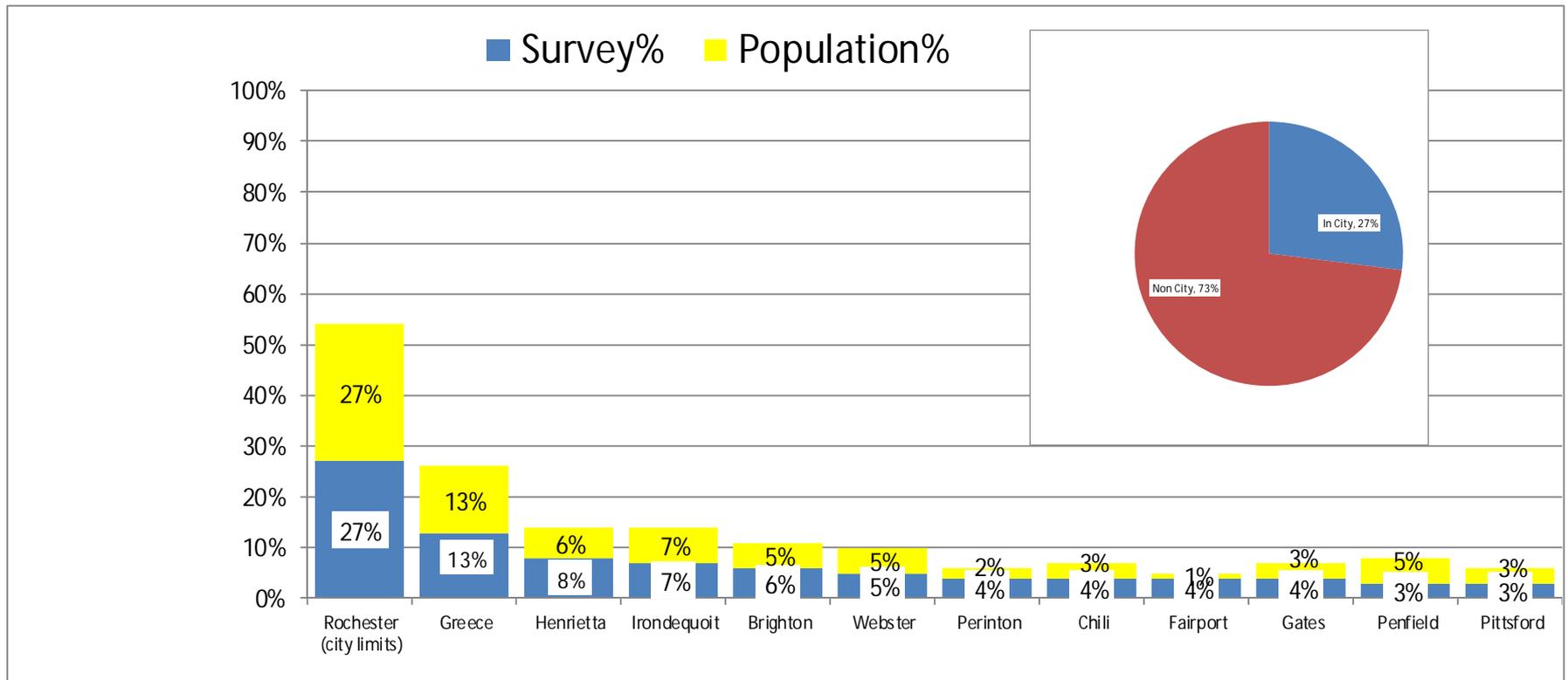
# Respondent Profile

The following demographic variables were collected:

- Geography
- Age
- Home owners vs. renters
- Gender
- Length of time at current address
- Marital status
- Annual household income
- Level of education
- Number of adults in household
- Children in household

# RESPONDENT PROFILE

In which town or city do you live in: (Top Responses)



The towns surrounding the City of Rochester were well represented (weighted survey distribution).

n = 801

# Question Responses

This section show responses to the survey questions.

In addition to tabulating the overall responses to each question, responses were also separately cross-tabulated by home ownership (renters vs. owners), location (City of Rochester dwellers vs. others) and income groups (under \$50K, \$50K - \$74K, and \$75K and up).

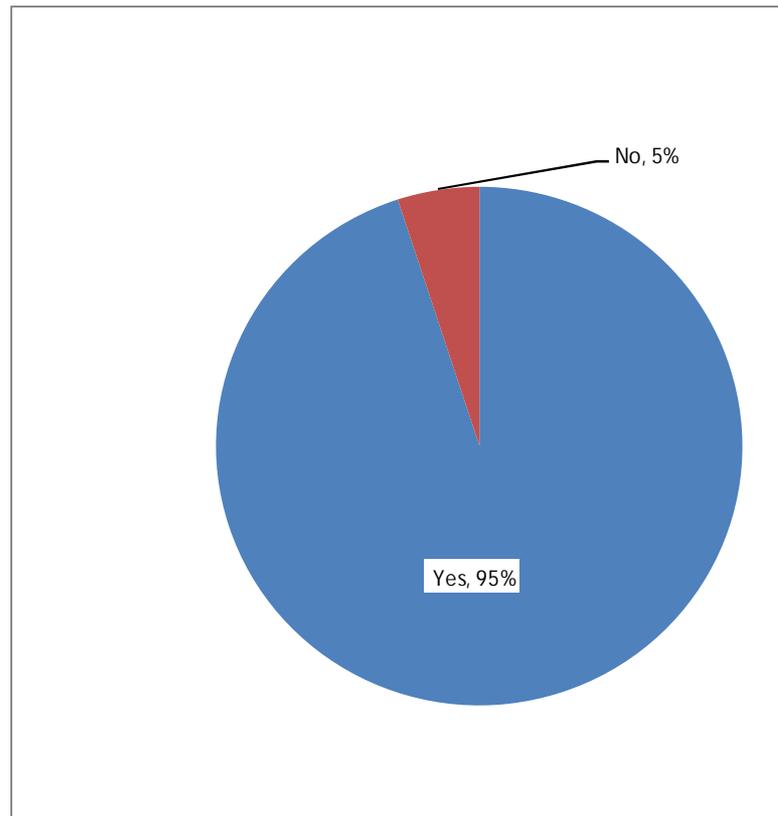
Differences according to these characteristics are noted where significant.

## Does your household use a container in your house or apartment to collect recyclable materials?

Only 5% said that they don't recycle at home using a container.

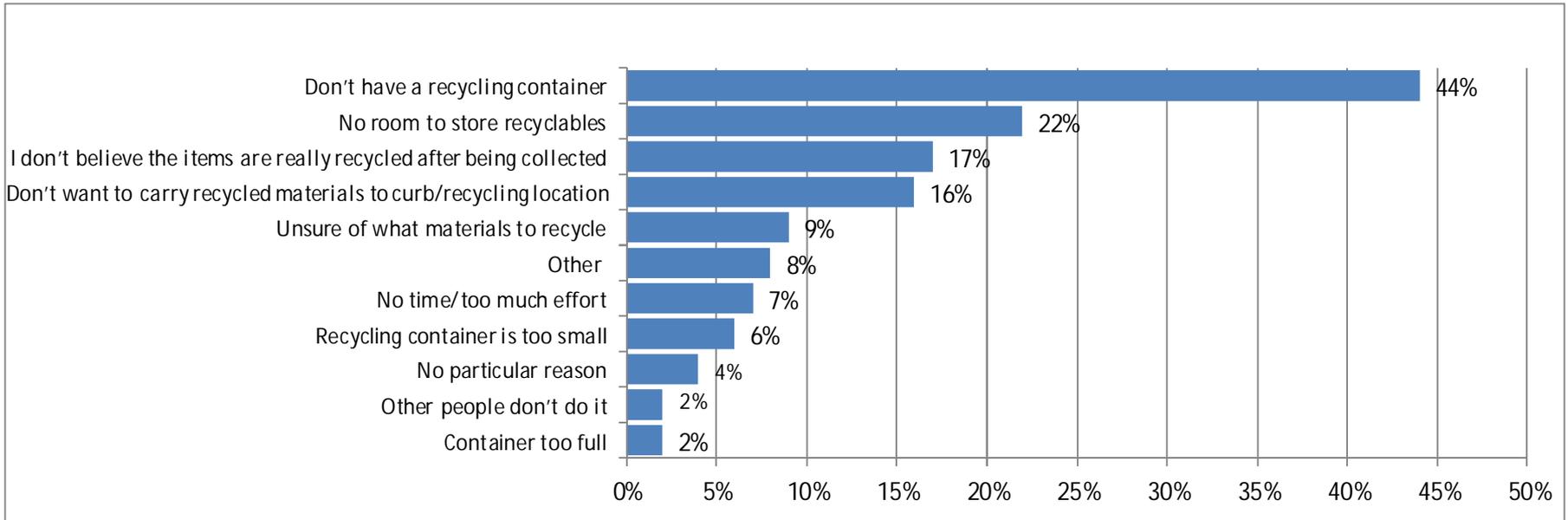
Only 2% of homeowners said they don't recycle versus 12% of renters. However, there was no difference when comparing those who live in the City of Rochester and those who do not.

For the remainder of the report, "non-recyclers" are those who answered "No" to this question and "recyclers" are those who responded "Yes".



n = 801

# What prevents your household from recycling using a container in your home?



The main reason given for not recycling is the lack of a container.

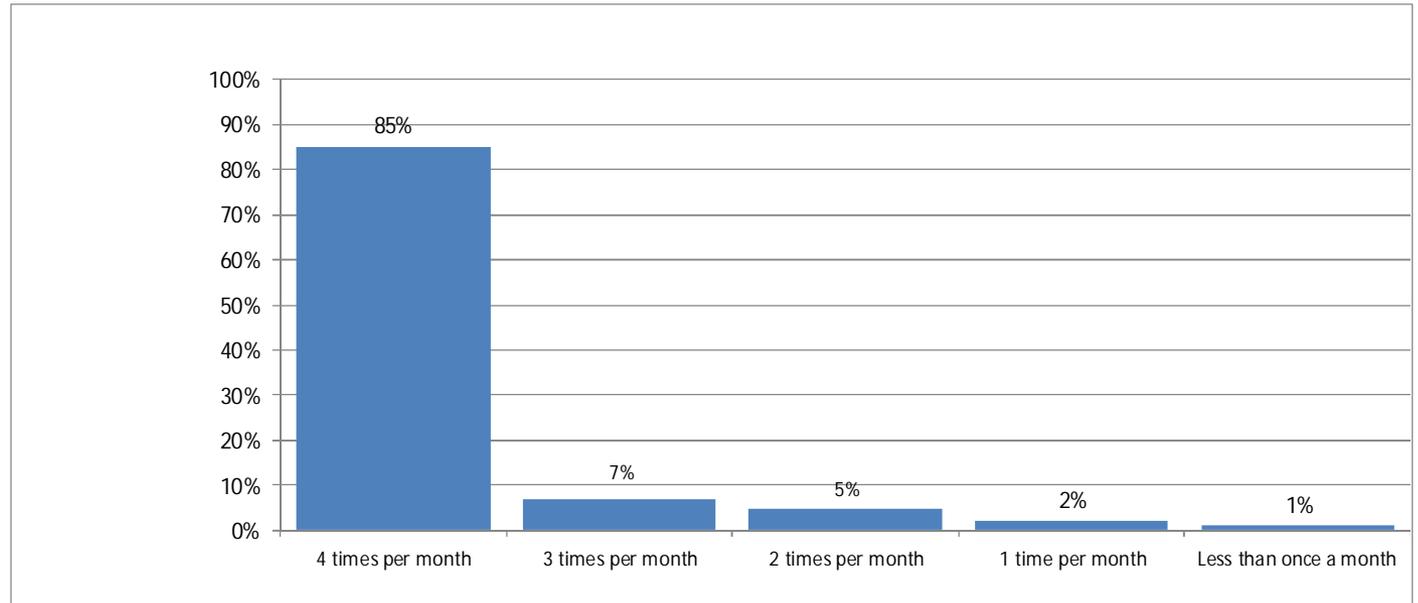
Asked of non-recyclers (39 respondents)

n =39  
Multiple Responses Allowed

# How often does your household typically put the recycling container at the curb?

Most respondents take their recycling container out every week.

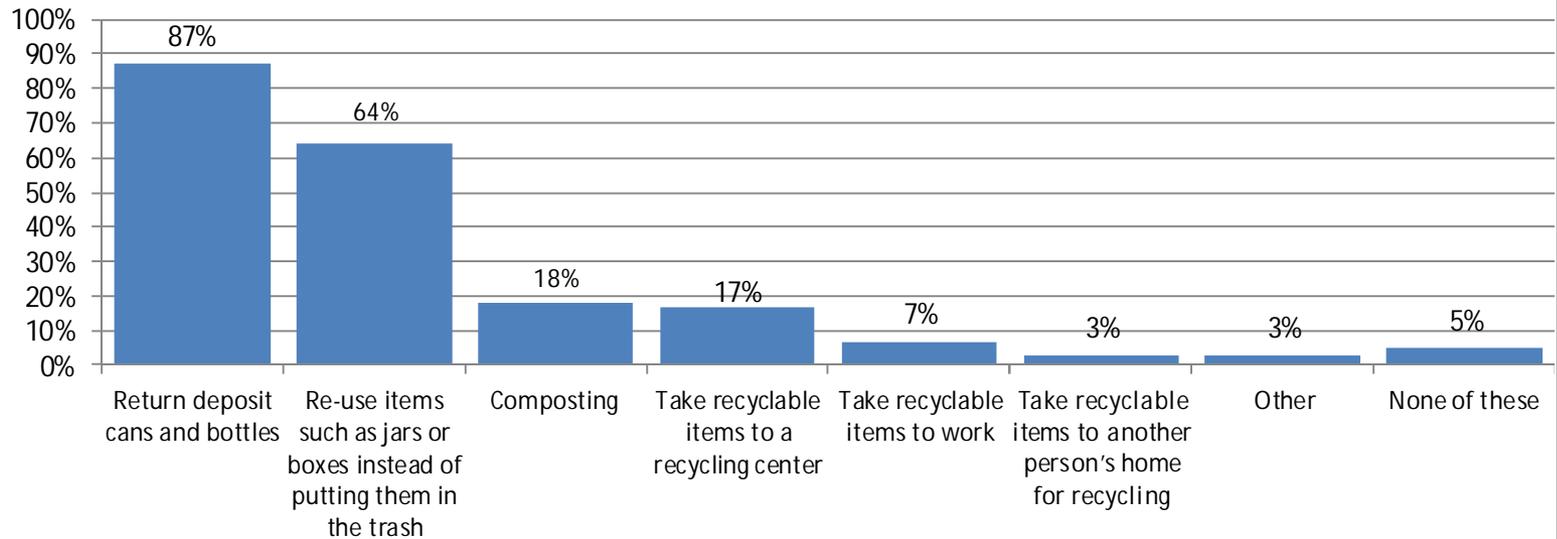
Respondents who live outside of the city and homeowners take the container to the curb more frequently than those living in the city and renters.



Asked of curbside recyclers

n = 669

## Does your household recycle in any of the other following ways?



Most respondents return cans and bottles and the majority re-use items.

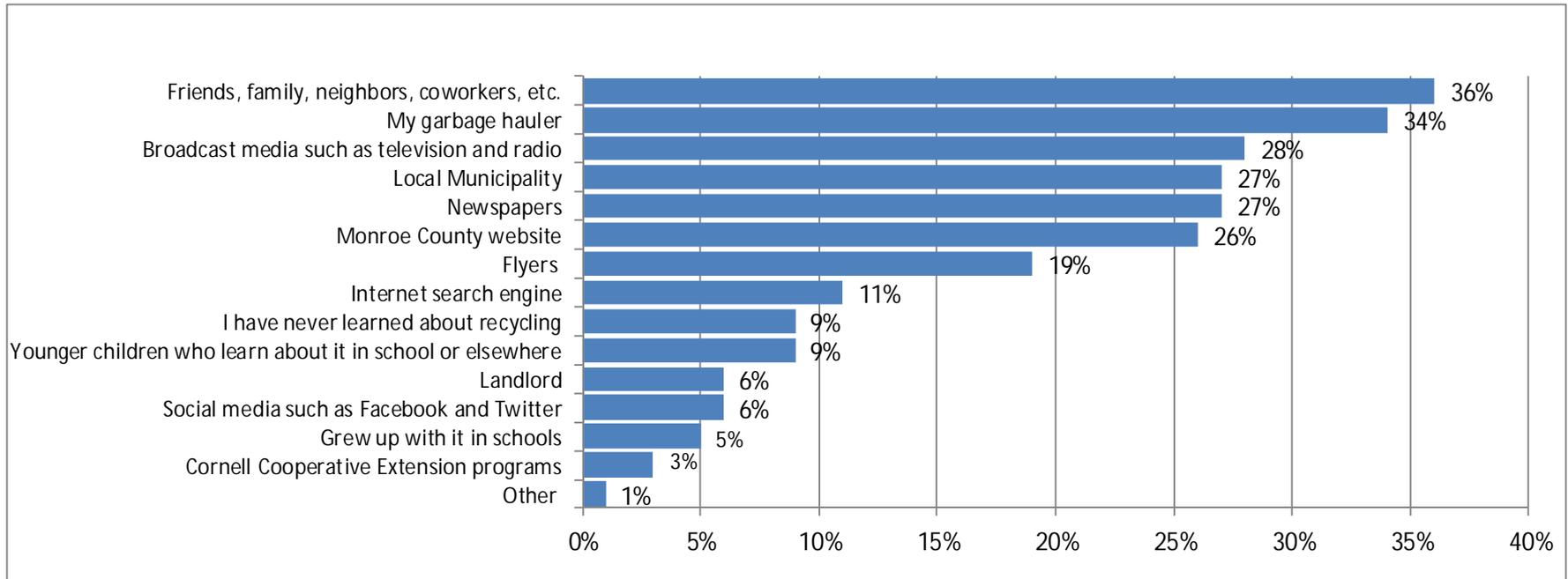
Out of the 39 people who don't recycle by way of container at their household ("non-recyclers"), only 9 said they do none of these. Thus, only 1.1% of the respondents don't recycle at all.

Those who live outside of the city and homeowners are more likely to return deposit cans and bottles than those who live in the city and renters. Homeowners/higher income households were also more likely than renters to compost and renters more likely to take recyclables to another's home. Those who live outside of the city were also more likely than those living in it to take recyclable items to a recycling center.

Asked of all respondents

n = 801  
Multiple Responses Allowed

# How do you learn about recycling?



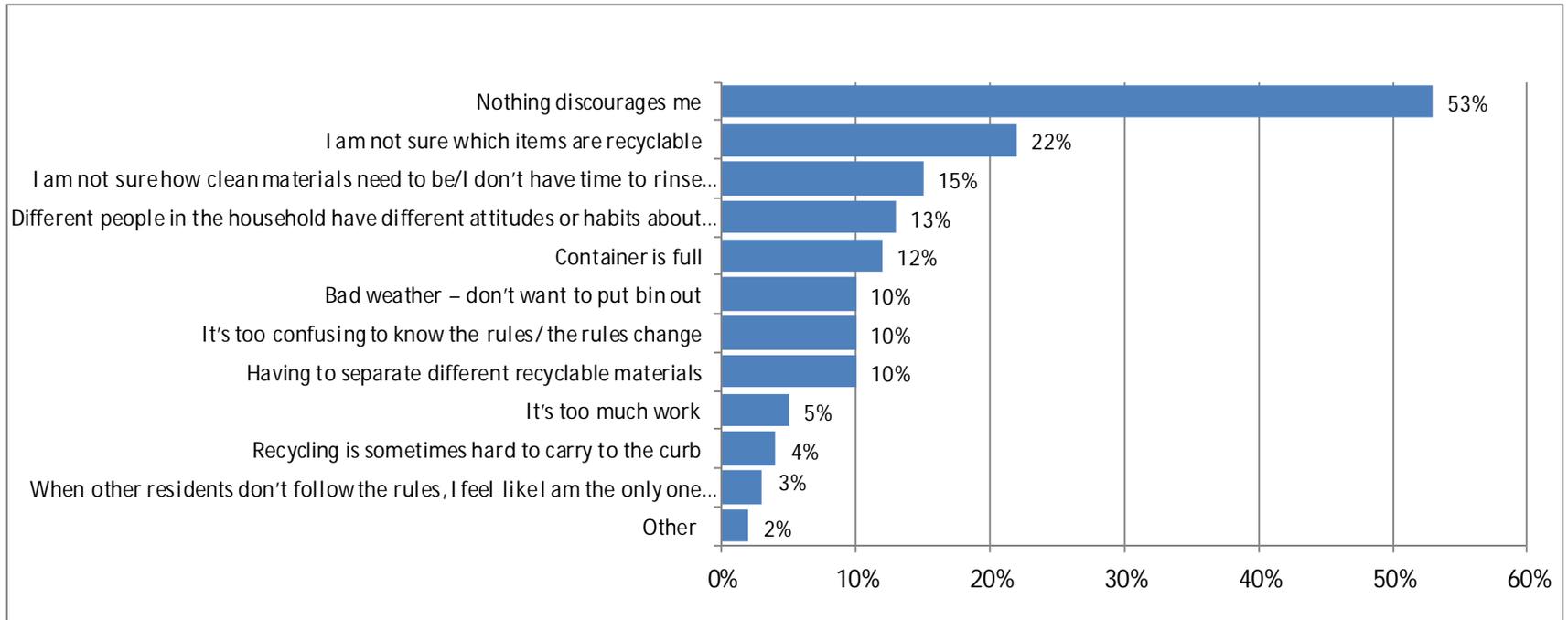
No one source really stood out for where the respondent learned about recycling, but “friends/family” and “garbage hauler” lead in mentions.

Those who live in the city are more likely than those who live outside of it to learn about recycling from friends/family/etc., from flyers and from their landlord. Those who live outside of the city are more likely than those who live in the city to learn from their garbage hauler. Renters are more likely than homeowners to hear about recycling from friends/family/etc., their landlord and social media while homeowners are more likely than renters to learn from their garbage hauler, local municipality and newspapers.

n = 801

Multiple Responses Allowed

# What discourages your household from recycling more often?



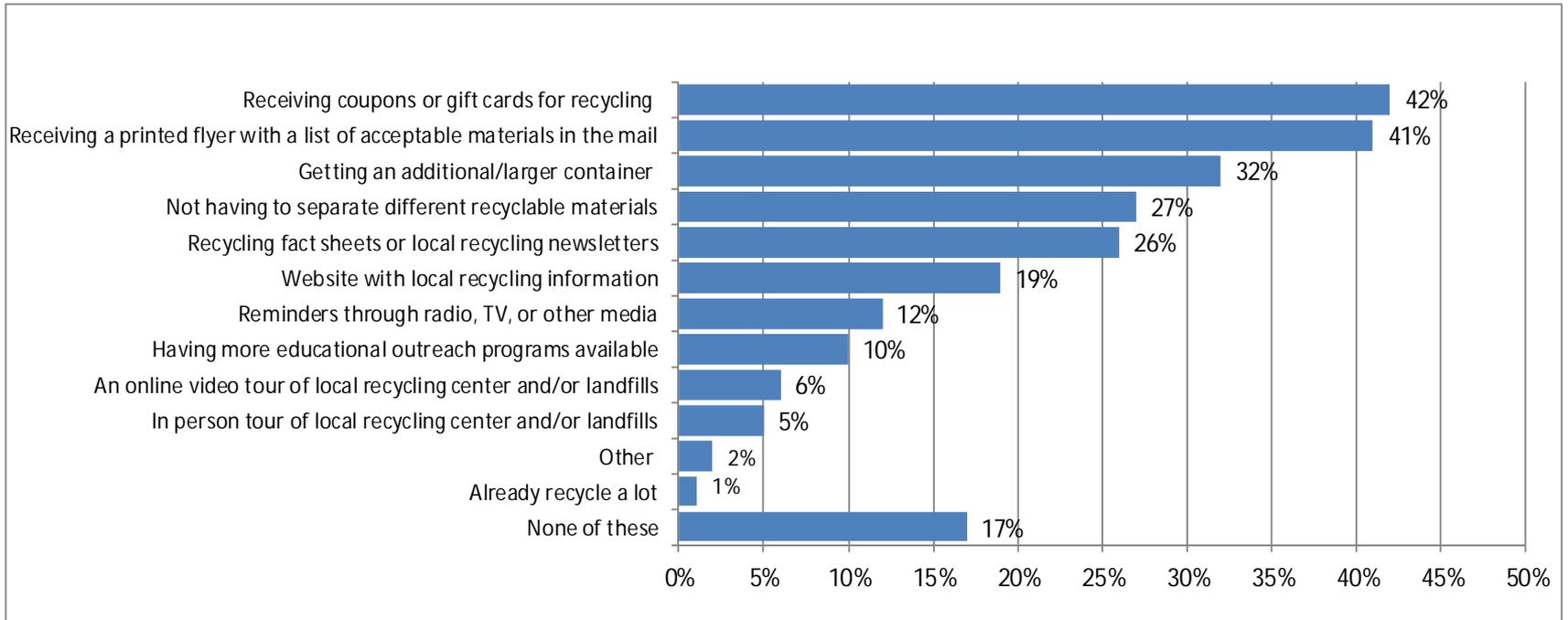
While the majority said nothing discourages them, the biggest issue that discourages recyclers from recycling more often is not knowing which items are recyclable.

Homeowners are somewhat more likely than renters to say nothing discourages them from recycling.

Asked of recyclers

n = 762  
Multiple Responses Allowed

# Which of these ideas would encourage you to recycle (or recycle more often)?



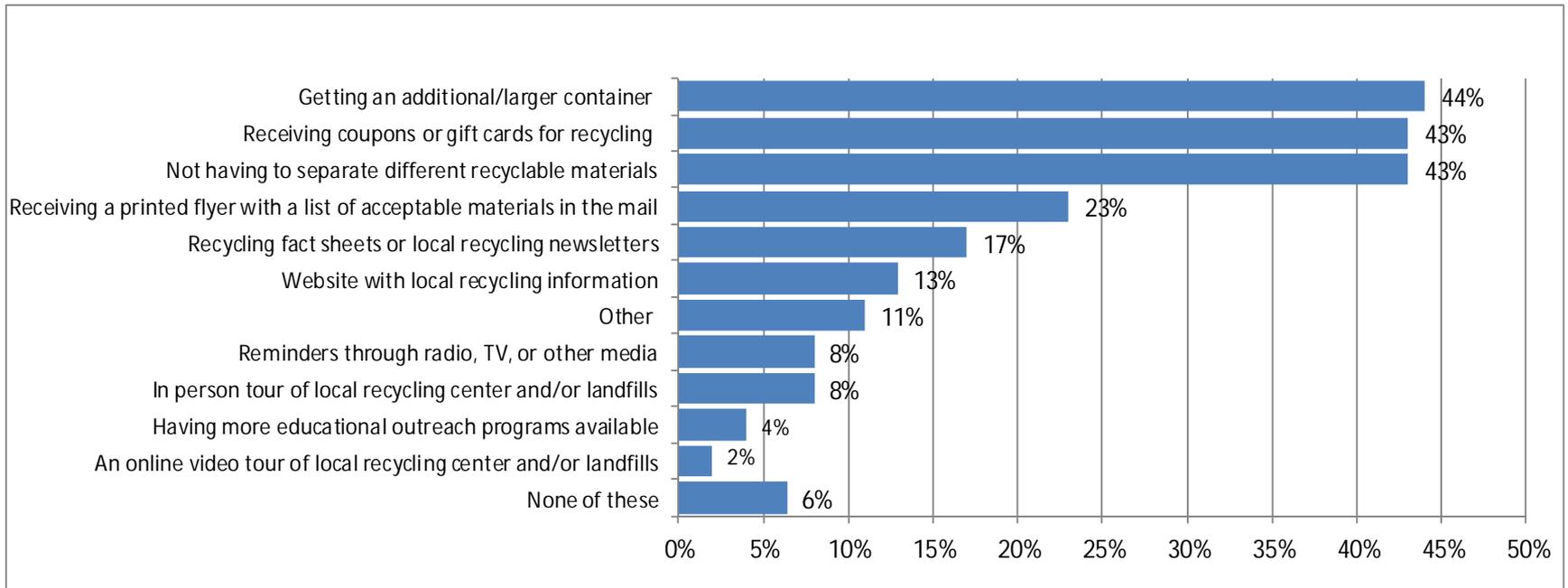
“Coupons/Gift cards” and “a printed flyer” are the two leading ideas to encourage respondents to recycle/recycle more often.

Those who live in the city are more likely than those living outside of it to be encouraged by getting an additional/larger container and reminders through media. Renters are more likely than homeowners to be encouraged by receiving coupons/gift cards, educational outreach and not having to separate. Homeowners would be most encouraged by receiving a printer flyer.

Asked of all responders

n = 801  
Multiple Responses Allowed

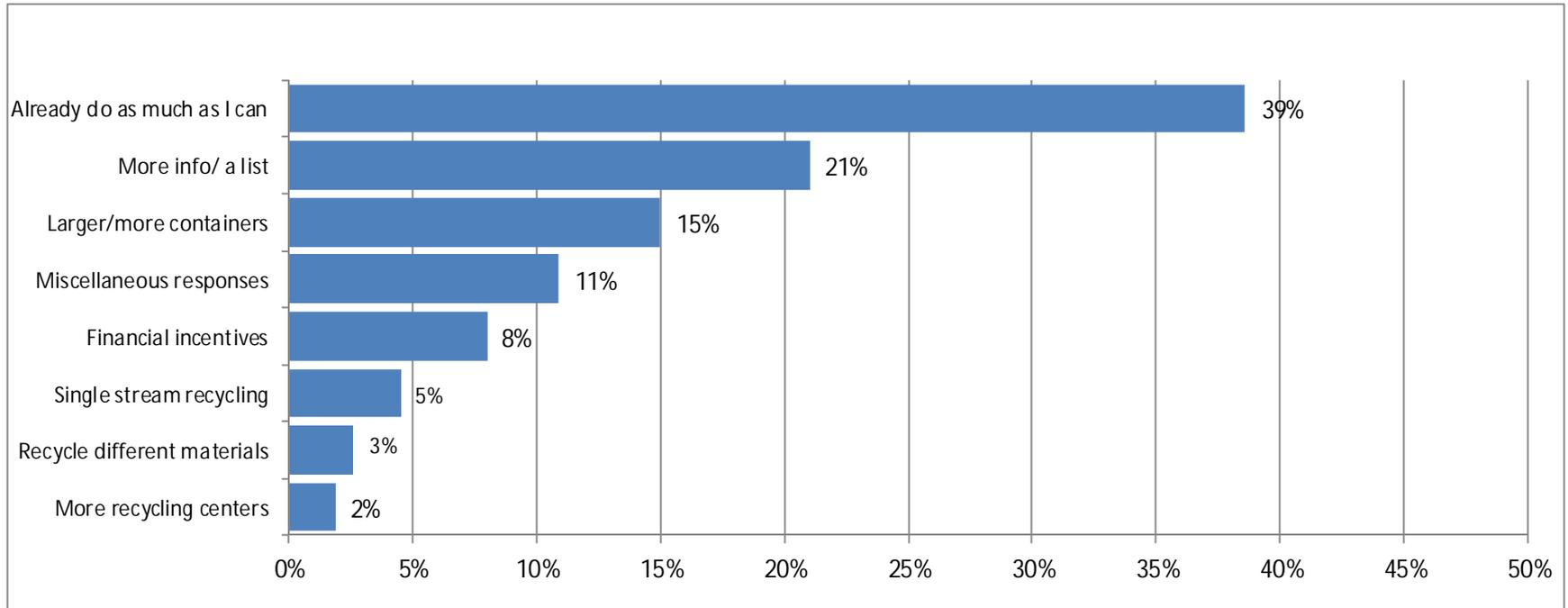
# Which of these ideas would encourage you to recycle (or recycle more often)?



Asked of all NON-RECYCLERS

n = 39  
Multiple Responses Allowed

## What could be done to increase your participation in recycling? (asked as open-ended question, then categorized)



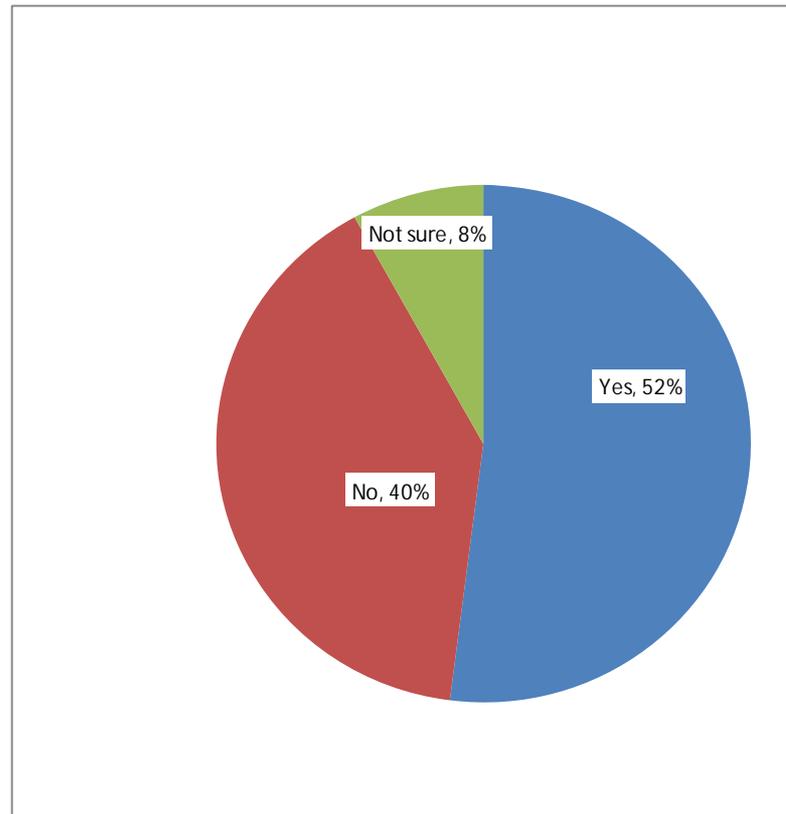
Many respondents said that they wish they knew more about what could be recycled; some suggested a laminated list.

n = 300 (randomly selected responses)

# Does your household need a larger recyclable container?

A slight majority feel they need a larger recyclable container.

Those who live in the city are somewhat more likely than those living outside of it to say they need a larger container, as were those in the higher income categories.



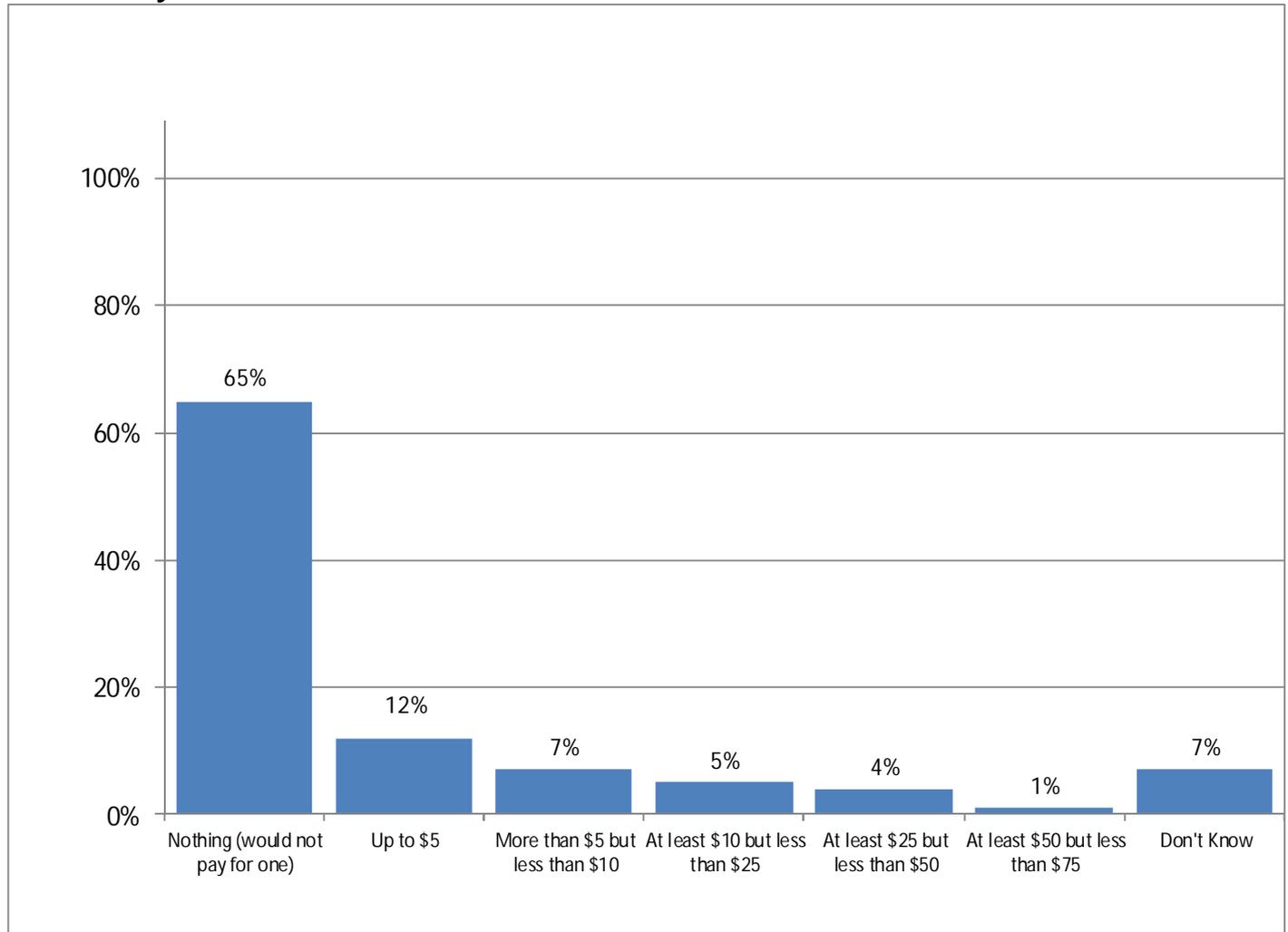
n = 801

Asked of all respondents

# How much would your household be willing to pay as a one-time fee for a wheeled, covered recyclable container?

The majority of respondents would not be willing to pay anything for a covered container.

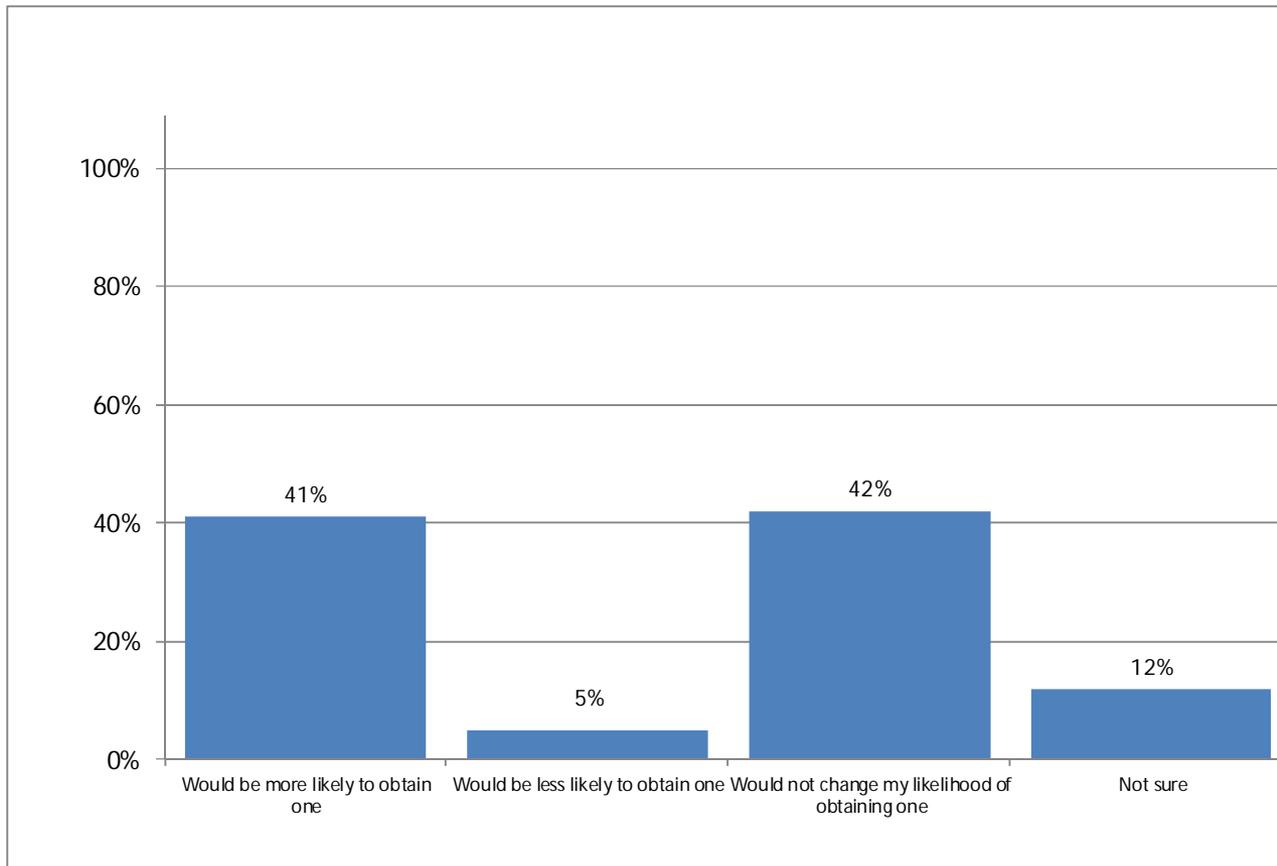
Those living outside of the city and homeowners were more likely than those living in the city and those renting to say they would pay nothing for it.



Asked of all respondents

n = 801

Your trash collector may no longer be requiring, or may soon not be requiring, that recyclable materials be separated, and thus all materials such as newspapers, plastic, glass and all other recyclable materials can be placed in one container. How will this change affect your likelihood of obtaining a covered wheeled recycling container described previously?



# SURVEY CONCLUSIONS

- A very high percentage of Monroe County residents participate in household recycling. Almost all households (95%) reported saving recyclable materials in their homes for placement at the curb or a recycling location.
  - The rate was especially high for homeowners (98%).
- Of the small number who do not recycle in this manner, most still participate in some other form of recycling, including returning deposit containers and reusing materials instead of discarding them.
  - However, the main reason given for not using a household container to recycle was lack of a container.
- For recyclers, recycling is a routine household activity. Most curbside recyclers take their recycling container to the curb every trash pickup, and this is usually due the bin being full. Those who use a central location usually take their recyclables to the container at least once a week, and many do so more often.

# SURVEY CONCLUSIONS continued

- Monroe County residents have heard about recycling from a wide variety of sources, especially via word of mouth from friends, family, etc., but trash collectors have been equally useful in providing information. The Monroe County website has also been one of the widely used sources of information.
- Despite the high rate of current participation, opportunities exist for increased recycling.
  - There is a limited opportunity to convert those who do not use a storage container at all to start doing so. Almost half said that they do not have a container to do so, and they tend to have positive attitudes about recycling. They tend to be renters, who many have less room for a container. They also are likely to have fewer items to recycle than those who already recycle.

# SURVEY CONCLUSIONS continued

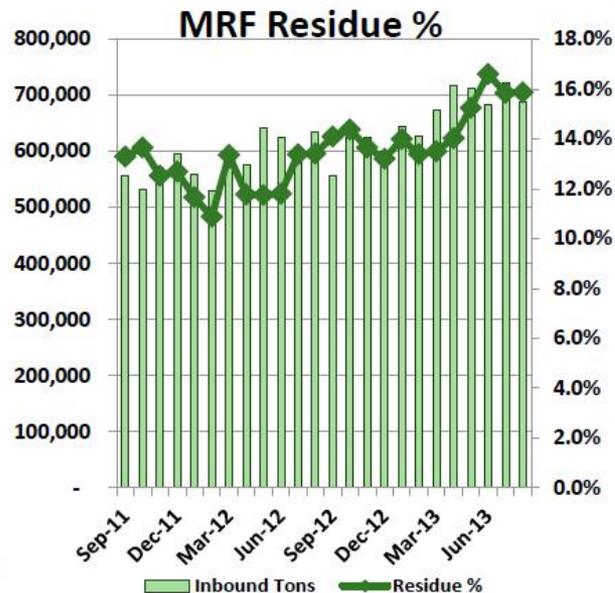
- Recyclers are not recycling all the items that they could and this is due in part to lack of information. Many recyclers in this study were vocal about wanting to recycle all that they could while at the same time not knowing what should be recycled. Thus, providing an up-to-date list of what can be recycled (e.g. in a laminated sheet as suggested by several) should be useful.
- Another increase in recycling could come from helping households to acquire more or larger containers. About half of all households said that they need a larger container, and the wheeled roller with a covered top received many positive comments. While the majority of those who need more container capacity said they would not pay for more, nor would the majority of those who reacted well to the idea of a covered rolled container pay for it, there are substantial numbers who would pay to get more container capacity.
- When implemented, single streaming should also contribute to increased material being recycled.

# Monroe County Single Stream

- Opportunities to market single stream, increase awareness of how to recycle right, and increase recycling rates
  - Top 5 methods shown in survey include info flyer, additional/larger containers, and not having to sort
- Survey is first step in developing marketing plan, which will help us achieve goal of increasing volume and maintaining low contamination rates

# WM Single Stream

- Market research led to development of campaign and supporting materials called “Recycle Often. Recycle Right.”
- Objective is to increase recycled tonnage and reduce residue by increasing consumer understanding of recycling
- Contamination is on average 16% of inbound tons (nationwide WM) Cost \$140 per ton
  - MCRC dual stream rate is less than 10%



# Conclusions

- Parties involved: Monroe County, WMNY, WM residential and commercial customers, WM Rochester Hauling, City of Rochester, Monroe County Recycling Center, Recycle America, Recycling Advisory Committee, municipalities, other private haulers
- Implications for operations and communications
- Two options to grow volume at MCRC remain questions:
  - How to we improve volume of existing customers?
  - How do we gain quality 3rd party customers?
- Shared responsibility for effectively maintaining material stream integrity and quality
- Moving forward to implement sustainable strategies