

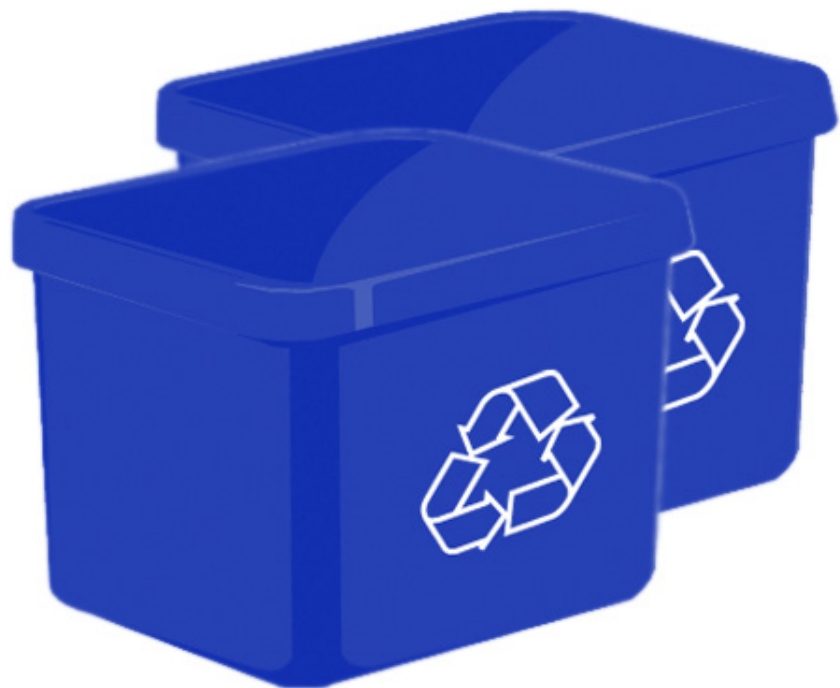
ENHANCING BLUE BOX RECOVERY
STEWARDSHIP ONTARIO E & E FUND

Executive Overview:

Benchmark Survey & Focus Groups

REGIONS OF

- DURHAM
- PEEL
- YORK
- CITY OF TORONTO



McConnell Weaver
Communication Management






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EXECUTIVE OVERVIEW

Introduction

The study was conducted to:

-  Provide baseline data of attitudes and behaviour.
-  Identify knowledge points and gaps.
-  Isolate opportunities for expanding diversion.
-  Identify key messages and themes.
-  Aid development of a campaign strategy.

The following Overview is based on 800 structured telephone interviews conducted in November 2005 among a randomly selected sample of householders in the GTA regions of Durham, Peel and York and City of Toronto. The distribution of the sample is provided below.

Region	Interviews: Single Family Curbside Recyclers	Interviews: Multi-Residential – Apt Bin Recyclers	TOTAL INTERVIEWS
Durham	78	10	88
Peel	114	38	152
Toronto	229	211	440
York	85	35	120
TOTAL	505	294	800

The sample was designed to reflect the actual proportion of curbside and multi-residential buildings in each region – overall, 63% and 27% respectively.

Type of Dwelling	Durham %	Toronto %	York %	Peel %	TOTAL %
CURBSIDE RECYCLERS					
Single-detached house	69	32	53	52	43
Semi-detached house	9	11	6	11	10
Townhouse/row house	5	7	8	11	8
Apartment in house	1	4	1	3	3
MULTI-RESIDENTIAL RECYCLERS					
Apartment/condo building 5 or more storeys	6	38	25	20	29
Apartment/condo, building less than 5 storeys	10	9	6	4	8

The data was analyzed according to region, recycling program type, participation frequency, awareness of recycling messages and other behavioural and demographic factors. Although there is considerable similarity between the regions, major differences were evident and will be noted when applicable.

All the interviews were conducted in English due to the lack of multi-language interviewing services and the large number of possible number that would have to be accommodated to represent GTA's culturally diverse population.

KEY FINDINGS - MERGING THE MEASUREMENT SURVEY & FOCUS GROUP FINDINGS

ISSUES

Recycling/landfill is a major concern for 16% of GTA residents. Toronto and York residents are more likely to view it as a high priority item for their elected local government than those living in either Peel or Durham. At this point in the interview respondents were not aware that the survey was about recycling.

RECYCLING PROGRAMS

Almost all (95%) of GTA residents claim that they are recycling. This figure includes the most loyal recyclers right down to those who recycle very little. Essentially most residents understand that recycling is normative and feel that they must comply, although actual performance varies considerably.

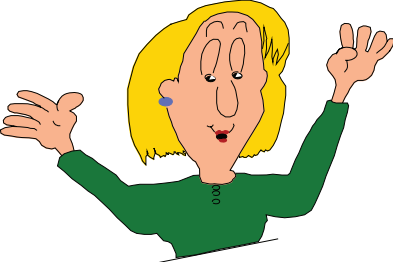


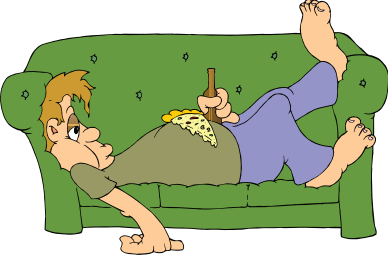
Curbside recycling dominates overall; however, the incidence of multi-residential bin diversion varies widely by region. It is most significant in Toronto with just under half of residents (47%) using the multi-family system, while curbside is dominant in Durham, Peel and York Regions, with at least 70% recycling this way.

RECYCLING TOOLS

Curbside recyclers are relatively well equipped with blue boxes - on average they own 2.44 boxes and place 2.22 boxes at the curb. Seven in ten received a recycling calendar, and most retained it for reference. However, it must be noted that a large minority of householders have only one box for recycling and indicate that they would recycle more if they had additional capacity.

Multi-residential recyclers lack educational materials - only one-third recall receiving recycling information and only half of those recipients kept it on hand. Focus group participants noted the importance of having a list on hand to inform them about all the new materials that could be recycled in their community bins. Most of these recyclers could not recall ever having seen one, nor was there any signage in the public spaces of their building promoting recycling and the array of materials that could be diverted from waste.

Recycling Segments

<p>“TRUE BELIEVERS”</p>  <ul style="list-style-type: none"> • Engaged, hold core values • Informed and active • Educators • Enthusiastic • Female skew • Welcome program improvements 	<p>“DOUBTERS”</p> <ul style="list-style-type: none"> • Focus on first generation items • Limited core values • Respond to community pressures • Can be motivated • Lack education/facts • Collection problems? 
<p>“STRIVERS”</p> <ul style="list-style-type: none"> • Believe in recycling/core value • Want to be good recyclers • Confused, lack information • Can be motivated • Missing tools (bins or list) • Collection problems? 	<p>“DEAD BEATS”</p> <ul style="list-style-type: none"> • Recycle little or no items • Lack core commitment/resistant • Motivated by negative ‘sticks’ • Male skew with hostility • Disenfranchised/oppositional role 

PARTICIPATION

Participation frequency varies considerably due to collection frequency. Most Peel curbside recyclers (91%) report that they put recycling bins out for collection weekly, but the rate drops to 65% in York, 51% in Toronto and 45% in Durham. Curbside recyclers with biweekly collection schedules indicated that weekly pick-up would enhance their ability to divert more recyclables.

More than half (60%) of multi-residential recyclers report that they visit their recycling bins several times a week.

Responsibility for recycling in-home is not always shared, although most recyclers do have assistance from their partner and/or children. However, only one in four indicate that "everyone/all in the household" are recycling. It appears that women, the female head of household, continues to have prime responsibility for tasks related to waste sorting and organizing the in-home collection system. Recycling is seen as an extension of traditional 'women's work' - food shopping and preparation and kitchen/household cleaning.

People who don't recycle are characterized by most recyclers as being lazy. However, multi-residential recyclers argue that it could also be a function of not having the "proper information," and others acknowledge that it could require too much effort. Yet when recyclers were asked directly why they don't recycle more, an array of barriers were introduced including lack of information, scarce time, and too much effort. And almost three in ten responded that they "recycle everything we can/can't do more."

PROGRAM FEEDBACK - MULTI-RESIDENTIAL

About six in ten (58%) report that their program is "very convenient"; seniors are more positive about it than young adults under 40 years. A variety of barriers were noted including the distance to the bins, lack of information, and messy or overflowing bins. In a minority of buildings (30%) residents indicated that their superintendents were not supportive of recycling or simply were not involved in it. All these barriers have a negative impact on the diversion of most materials; specific items varied depending on the respondent. Also worth noting: some people also wanted organic recycling to be added to their system.

AWARENESS OF RECYCLABLE MATERIALS

The awareness and recycling levels varies depending on the material and to a great extent when it was added to the recycling program, as summarized below:

Recyclable:	INTRO DATE:	RECYCLING RATE:
Cans, bottles, jars, newspapers	1st Generation	High
Boxboard, corrugated cardboard	1st Generation	High - medium
Plastic containers/food	2nd Generation	Medium high
Mail/junk mail	1st Generation	Medium
Plastic containers/ household cleaners	2nd Generation	Medium
Tetrapaks/aseptic Styrofoam	3rd Generation	Medium-low
Aerosol containers Aluminum plates	3rd Generation	Low
Paint cans	3rd Generation	Very Low

There is clear evidence that curbside recyclers divert more types of materials than multi-residential residents.

The range and volume of items people recycle is partly a function of whether they separate items at source, in the room where disposal occurs. The presence of a special bin for recyclables keeps them separate from waste and helps ensure that they will be put in the recycling bin. It was less likely that busy householders would pick through waste baskets to remove recyclables - diverting them at the time of disposal was seen as the better way to ensure that items are recycled. Households that primarily recycle out of the kitchen focus on items generated in and around that area to the exclusion of waste created elsewhere in the home.

A strong minority (about 40%) admit that they are having difficulty keeping up with the program changes and ongoing introduction of new materials. However, it is important to note that most people supported these advances; the more they recycled the less waste they created.

Multi-residential recyclers report that the type of beverage container that they are most likely to buy is plastic bottles, followed at a great distance by cans and glass.

Fear of identity theft is hurting recycling. Just over half of residents indicated that they do not recycle bills or personal letters. This factor was more prominent in York, Peel and Durham than in Toronto.

PROGRAM LIKES AND DISLIKES

Most recyclers had something positive to say about recycling; however, the types of comments differed considerably depending on the system. Curbside recyclers were pleased with its ability to save landfill/divert waste, 37% mentioned its environmental benefits. Multi-residential recyclers focused mainly on positive aspects about the program - for instance, they're pleased that it's available. A small number made reference to landfill or the environment. Also, a small majority linked effective recycling programs with litter reduction in their community.

A variety of dislikes were mentioned, although it is important to note that almost half of both types of recyclers did not voice a complaint about recycling. Top of the list for curbside recyclers in Durham, Toronto and York was the desire for weekly collection of recyclables. The other factor that generated significant complaint was lack of capacity - 11% indicated "not enough room in boxes/more boxes/need bigger boxes." Just under half (44%) indicate that they would recycle more if they had another blue box.

The biggest complaint among multi-residential recyclers was bin-related - bins not conveniently located, bins full of garbage, bins outside, bins full. Almost two-thirds of apartment/condo residents claim that they would indeed recycle more if it was easier. Lack of storage capacity is a problem for one in three.

PURPOSE OF RECYCLING PROGRAM

Recycling is primarily about cutting down garbage and saving landfill capacity and helping the environment. Curbside recyclers focused more on the landfill issue while multi-residential recyclers tended to mention the re-use benefits accrued from recycling. However, overall there was low mention that recycling conserves primary resources.

About half of recyclers think that their recyclables are being remanufactured into new products/packages. Very few think they are being landfilled, although a significant minority is general about the fate of these materials - 'recycled,' 'sorted,' 'marketed.'

While eight in ten believe that recyclables that are placed in the garbage go to landfill, another two in ten are not sure or are misinformed.

RATING THE PROGRAM

Average Ratings (1 to 10)	Durham	Toronto	York	Peel	Total
Convenient to use.	7.86	7.64	7.91	8.24	7.82
The ease of recycling using blue boxes/apartment recycling bins.	7.77	7.59	7.75	7.81	7.67
The collection workers provide a consistently effective service.	7.81	7.26	7.99	7.71	7.52
Overall evaluation of your municipality's recycling program.	7.28	7.08	7.26	7.21	7.15
Sufficient information about how to participate in the recycling program.	7.22	6.95	7.17	6.90	7.01
The clarity of the messages that are used to encourage people to recycle.	6.79	6.87	6.97	6.87	6.87
The program's effectiveness in reducing the amount of materials that goes to landfill.	7.02	6.77	6.83	6.93	6.83
Feedback about the accomplishments of the recycling program.	5.26	5.07	5.24	4.90	5.09

GTA's recycling programs received relatively good ratings for convenience, ease of use, collection consistency, and participation information. However, ratings dipped to 6.83 for impact on reducing the amount of waste that goes to landfill. The lowest scoring factor was program feedback - 5.09 out of a possible score of 10. This was consistent in all four participating regions. In all instances across the GTA, curbside recyclers gave higher ratings than those who recycle using apartment bins. And, in many cases seniors were more positive than their younger counterparts.

PROGRAM IMPROVEMENTS

Curbside recyclers requested more bins, better/more frequent collection service and more promotion/advertising. Multi-residential recyclers were interested in more recycling bins and better access, and better information/education about the program. This latter point came up frequently in the focus groups.

DISPOSAL AWARENESS & OPTIONS

Nine in ten people indicate that they are aware that GTA waste is being shipped to Michigan; however, only 20% support this solution. Most of the remainder indicated it is "not a good idea." It is noteworthy that very few recyclers have no opinion about this issue. The majority who oppose export to the United States indicated, "It's our garbage, we should take care of it here"; a minority believe that it's a costly approach or that it causes air pollution and wastes energy. A number of acceptable alternatives were mentioned: incineration, more recycling and new landfill (here or in Northern Ontario). Just less than three in ten do not have a solution.

OPTIONS FOR INCREASING RECYCLING

Seven options that could increase recycling were tested. At least three-quarters of the GTA recycling population endorsed program education and feedback and making recycling mandatory. Charging a levy to inefficient apartment recyclers also got majority support - 75% from curbside recyclers and 66% for apartment dwellers. Bag limits had support of two-thirds of recyclers, while user-pay was rejected by 73% of the population. Some focus group participants referred to it as a "double tax" and worried that large families would be disadvantaged with this system. Also, doing spot checks of garbage bags and fining people who were not recycling eligible items was contentious - 55% opposed it. And, while some focus group participants could understand the reason for taking this approach with households that repeatedly generated many bags of garbage, it represented an invasion of privacy.

	Support %
Provide more education about what can and cannot be recycled.	97
Provide feedback about what is happening to our recyclables.	92
Make recycling mandatory.	78
Charge apartment/condo buildings for their garbage if they don't operate a good recycling program.	72
Limit the number of garbage bags.	67
Do spot checks on people's garbage & fine them if recyclables in garbage.	41
Charge for every bag at curb.	24

RECYCLING MESSAGES

One in four GTA recyclers claim they have recently heard or seen messages about recycling. Print media including newspaper ads, posters, and newsletters dominated recall. Television references played a minor role. Recall content was divided between references to specific recyclable items and the overall "recycle more" message. These messages had an impact with half of this audience who reported that they now recycle more.

When prompted, one in five recyclers recalled seeing the newspaper ads - "Did you know...?" Again, more than half of this audience claimed that it prompted them to recycle more overall or to recycle specific items addressed in the campaign.

Focus group respondents seemed to agree that it was essential to promote recycling and advertise specific materials; however the sample ads were seen as lacking impact and clarity.

RECYCLING CALENDAR

Seven in ten curbside recyclers recalled receiving a recycling calendar and most (89%) retained it. This contrasts with only one in three apartment/condo recyclers who remembered receiving a list of recyclables, and only half still have it on hand.

Recycling calendars are seen as essential - "full of useful information" - and are critical given that recycling programs are evolving and adding new materials. Most (73%) of recyclers are surprised to see all the things that can be recycled. It is an on-going learning process that deserved on-going promotion.

RECYCLING MESSAGES







Recyclers indicated interest in two types of messages - information about what can and cannot be recycled, and feedback about the program including what happens to their recyclables. Eight in ten indicated, "If I knew that recyclables were being made into new products and packages, I would make more of an effort to recycle them."

Focus group participants noted that they are operating in an information vacuum. Most recyclers believe that they do what they think is right with the tools they have and periodically get a new list of recyclables, if they are curbside recyclers. But they never hear how the program is doing and whether it is achieving its goals. While most people assume that their recyclables are being used productively, they have little evidence to support this supposition. The silence on recycling's achievements is thunderous.


REGIONAL DIFFERENCES

Durham	Peel
<p>In Durham only 8% view landfill/recycling as a serious issue compared to 16% in GTA.</p> <p>Lowest frequency in GTA (55%) of residents place recyclables out every other collection.</p> <p>Capacity problems most evident in Durham Region</p> <p>High demand for recyclable list</p> <p>In Durham 47% reported that their spouse puts items in the blue box compared the whole GTA at 38%.</p> <p>Durham leads with 34% regarding the incidence of 'saving landfill' tops the list of what they most like about the Blue Box recycling program.</p> <p>Durham recyclers more supportive of limiting number of garbage than Toronto and York Region</p>	<p>Highest frequency in GTA (92%) put recyclables at the curb every week/collection.</p> <p>In Peel, 17% indicated that their children (under 18 years) are placing recyclables in the blue box compared to 9% throughout the GTA.</p> <p>Peel second highest at 25% 'saving landfill' is what they most like about the Blue Box recycling program.</p> <p>Limited Blue Box capacity less of an issue in Peel region at 8%. (Peel has weekly recycling pick up) Peel residents awarded their program the highest score for convenience at 8.24 compared to 7.82 in GTA.</p> <p>Peel recyclers more supportive of limiting number of garbage than Toronto and York Region</p> <p>Peel is most dissatisfaction with co-mingling of materials in collection vehicle.</p> <p>Peel curbside residents lowest level of receiving recycling calendar in the mail - 50% and highest demand for recyclable list</p> <p>Greatest interest in receiving recycling tips.</p>
Toronto	York
<p>Toronto (18%) residents express greatest concern about landfill/recycling.</p> <p>On average, Toronto householders own more recycling containers and place more out for collection than residents elsewhere in the GTA.</p> <p>Regarding the incidence of 'saving landfill' the list Toronto rates second lowest 18% of what they most like about the Blue Box recycling program.</p> <p>Toronto curbside recyclers highest level of receiving a recycling calendar - 80% in the mail</p>	<p>York at 16% second highest concern in GTA regarding landfill/recycling as a serious issue.</p> <p>York 7% of residents not recycling, in contrast 5% for entire GTA</p> <p>York better informed than whole GTA when it came to aerosol containers, and household plastic containers.</p> <p>York 13% (children over 18) is placing items in the box compared to 8% for the whole GTA.</p> <p>York region lowest in GTA at 15% list 'saving landfill' what they most like about the Blue Box recycling program.</p> <p>York (25%) greatest support for exporting garbage compared to one in five supports in GTA.</p> <p>York Region more curbside recyclers admit that they are consigning recyclables to the garbage stream on occasion.</p> <p>Lowest interest in receiving recycling tips</p>

CONCLUSIONS & RECOMMENDATIONS

-  There is near universal adoption of recycling by GTA households, but the actual rate of separation varies considerably depending on a number of variables, including the type of recycling program and personal commitment. Households with access to curbside service separate more items and demonstrate higher satisfaction levels with the program. Conversely, apartment/condominium residents have lower performance and give their program a lower score.
-  'First generation' blue box materials are best known and experience the highest likelihood of diversion. However, there is a gap in awareness of what can be recycled as the program evolves and new items are added to the list. Hence, the more recently introduced items are less likely to be diverted; three quarters of residents were surprised to see all the items that could now be recycled.
-  Recyclers applaud the expansion of their recycling program because it achieves their desired goals of reducing the volume of guilt-inducing garbage, saving landfill capacity and doing something positive for the environment. However, they also admit that they are having difficulty keeping up with changes and realize that education is critical. This is a worthy program that deserves publicity.
-  The high penetration of awareness that GTA's garbage must be shipped to Michigan for disposal strikes the majority as the wrong solution. Theoretically, most residents are opposed to it, espousing the value that waste is the responsibility of those who create it. Further, some residents see export as fiscally and environmentally detrimental. But there is no clear, widely accepted agreement on a possible solution for this problem - the GTA population is divided into four opinion camps: more recycling, create a new landfill site, incinerate it or 'don't know.' Some focus group participants attempted to discuss this issue, concluding that it was complex and should be left to "the experts" to make the best decision. However, most people agreed that they did not want their community to be adversely impacted by the creation of new landfill sites or an incinerator.
-  Despite disapproval of GTA's garbage disposal practice, there is a strong rejection of hard solutions of user-pay or fining people who put recyclables in the garbage (spot checks). However, 'soft measures' that are not economically punitive win more support. Top of the list is education (what can and cannot be recycled and program feedback), making recycling mandatory (possibly people think it is already), and limiting the number of garbage bags (given that most households normally have no more than three bags). The one punitive step that three-quarters of curbside recyclers and two-thirds of apartment/condominium recyclers endorse is charging "buildings for their garbage if they don't operate a good recycling program." Possibly apartment dwellers see this as the best way of motivating building management to making their recycling systems more accessible and functional (more bins, better bin placement and maintenance).
-  Recyclers report that communication and education are essential for high diversion and do have a positive impact on behaviour. However, the majority are not aware of any mass media messages on the subject. The only type of information what is getting through (and it is mainly reaching curbside recyclers) is the annually delivered recycling calendar. It is treated by most as an essential tool to be kept on hand. Most multi-residential recyclers have not received any

information about the program; the only cues they have are provided by the labels on the recycling bins, which may or may not be up-to-date.

 Recyclers were consistent in the remedies they recommended for improving their program. Three main factors were identified:

1. Information/Education

A number of different categories of information are required - regular updates and calendars, reminders of what can and cannot be recycled, instructions on easy preparation steps, and news of outcomes (what is being done with recyclables and how much is being diverted from landfill). While the majority think or hope their recyclables are being transformed into new items, 20% either think they are being landfilled or simply don't know; hence, these people may be uncooperative, stymieing the best efforts of other household members. A recycling list is an essential tool for every GTA household.

In addition, recyclers need to be encouraged to divert materials from every waste generating area in their home, not just focus on the kitchen items. This means that educational materials should include room-by-room lists of items generated in each room; this will prompt recyclers to consider installing more waste baskets and to think of recycling everywhere in the house.

A status report on the achievements and outcomes of the recycling program is missing. Residents are not aware of the diversion goal (65%) nor do they know what has been accomplished. Curbside recyclers were both pleased and surprised to learn that they had barely reached half of the goal; this was important feedback that could prompt committed and less diligent alike to do a better job. And, some multi-residential recyclers were shocked to learn how poorly their program was doing overall. It was a signal that major changes were required to building recycling programs in order to bring about the desired diversion rate. They blamed both residents and building program organizers for this poor performance.

2. Bins

Some curbside recyclers indicate that they need more bins; this means more or bigger bins to store the increasing array of items that are now accepted in GTA recycling programs. It would appear that many recyclers expect that additional bins will be provided at no expense; however some residents are willing to buy their own if they are inexpensive and easy to access.

Apartment/condominium recyclers observe that their bins are poorly placed, overfilled or not properly maintained. Some buildings either do not have sufficient bins or have more bins reserved for garbage than for recycling. Also, evidence that their neighbours are contaminating the recycling bins can have a negative impact on behaviour.

3. Collection

The large amounts of recyclables generated by GTA households should now exceed garbage volumes; however, collection in some regions does not reflect this situation. Weekly collection would seem to be essential in order to maximize capture and reinforce the primary nature of recyclables over garbage. Also, curbside recyclers rely on collectors to be consistent in service and materials that are accepted or rejected. Clearly, householders expect that collectors are recycling experts, hence the importance of 'training the trainers'.

Reaction to the commingling of recyclables is mixed - some curbside recyclers find it much easier to do it this way while others resist changing their sorting behaviour. Consequently, some members of this latter group were disturbed to learn that collectors commingle recyclables in the truck - does this mean that the materials are not being recycled? Confusion over this matter can be addressed by ensuring that collection vehicles carry signs indicating that recyclables are sorted after they are collected.

OTHER FACTORS

Reinforce the essential nature of recycling by making it mandatory, indeed some focus group participants were surprised that it wasn't already obligatory given its role in reducing waste.

Promote bag limits and be prepared to enforce those limits.