



Know Your Recycling.

Final
Report for
Part 3
Survey

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Sustainability Victoria

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Submitted:
30 June, 2021

KANTAR



Executive summary.

Since June 2018, Sustainability Victoria and Kantar Public (previously Colmar Brunton) have been measuring recycling understanding and behaviours among Victorians using an online tracking survey (n=1,000 per Part). Sustainability Victoria launched a communications campaign, 'Know Your Recycling' in 2020-2021. This report presents the findings from the third of three waves of advertising and subsequent surveying ('Parts').

Overall campaign impact

- Overall, the campaign has had demonstrable impacts on its target audience. However, these impacts took time to build over its lifespan, and a great deal of fluctuation was observed over the time that the campaign was in market.
- For example, rates of incorrect recycling practice were relatively high at 55% in 2019 and fluctuated between 50% and 53% in the early days of the campaign in 2020. The rate of incorrect recycling practice then dropped to 46% in the final Part of the campaign in 2021.
- Rates of incorrect knowledge showed a similar pattern. Incorrect recycling knowledge appeared to increase in the earlier stages of the campaign from 65% to as high as 73%. This is possibly due to the widespread changes in recycling requirements that were being rolled out at the time of the surveys. By the end of the campaign, rates of incorrect knowledge had come back down again to 68%.
- The rate of recognition of the campaign materials was uniformly high across the three Parts of tracking at around five in ten Victorians recognizing the campaign collateral when it was shown in the survey. This is a good rate of cut-through across the media channels used for the campaign.
- More than seven in ten Victorians who recognized the campaign collateral took some form of action across the three Parts of the survey. Again, this can be considered a good response to the direct and indirect calls-to-action for the campaign.

Campaign findings for the current Part

- Overall campaign recognition has increased significantly from 45% in Part 2 to 53% in Part 3. This brings recognition levels in line with those seen in Part 1 (51%) when the campaign was first launched.
- The TVC is still by far the most recognised element of the campaign, far greater than the figures for radio, online and outdoor combined.
- After seeing the campaign, most respondents found it to be easy to understand and agreed it was an appropriate way to communicate the information (82% and 81% respectively).
- However, the campaign was not necessarily seen as new or novel. Only half agreed it showed them something they didn't know (49%). This is not necessarily a negative finding. It may suggest that good recycling practices are becoming embedded in the minds of Victorians.
- Seven in ten Victorians who saw the campaign took some form of action, similar to previous iterations of the survey.
 - Most commonly, these actions related to thinking about recycling at home (four in ten of those that recalled the campaign), or indeed changing recycling practices at home (over two in ten of those who saw the campaign).
 - Seeking information, either by 'looking it up' or by asking someone else, were less common forms of action.





Executive summary.

Current recycling practice and knowledge

- **Practice:** In the Part 3 survey, just under half of Victorians indicated that they had placed an item in the bin that should have been disposed of in another fashion (46%).
- The rate of incorrect recycling practice decreased (i.e., a positive shift) between the Part 2 and Part 3 surveys for both the total population (53% in Part 2 to 46% in Part 3) and for males (60% compared to 49%). This positive shift in practice for all Victorians as well as subgroups of interest (i.e. CALD, Multi Unit Dwellers, metro, male, younger) strongly suggests a positive impact from the campaign.
- **Knowledge:** Overall, the rate of incorrect recycling knowledge has declined from 73% in Part 2 to 68% in Part 3. This decrease in rates of incorrect recycling knowledge in this Part can also be seen for males and those living in metro areas.
- We can therefore conclude that awareness of correct recycling knowledge has increased since October 2020 for both the total population and demographics of interest, again strongly suggesting a positive impact from the campaign.

Current attitudes towards recycling

- The overall findings from attitudinal measures from the Part 3 survey are very similar to those from Part 2.
- Overall, Victorians are very positive about the importance and benefits of recycling, even if they are sometimes less positive about the practicalities of their own recycling.
- For example, around eight in ten agree:
 - It is the responsibility of all Victorians to put the right items in their recycling bin;
 - Recycling is important to protect the environment; and
 - People need to think carefully about what can and can't be recycled.
- However, some topical shifts in findings were observed since the Part 2 survey:
 - There has been a significant decrease in the proportion of Victorians who perceive that 'recycling is easy and takes no time at all' (73% to 68%). This perhaps reflects the additional cognitive load associated with changing recycling requirements in Victoria relating to FOGO and the fourth glass bin.
 - Further, the perception that it is 'hard to know what goes in the recycling bin' has increased in Part 3 (36% to 42%). Similar to the comment on the previous page, this perhaps reflects recent changes in Victoria such as the roll-out of FOGO and four-bin system.





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Background and methodology





Background.

- Since June 2018, Sustainability Victoria and Kantar Public (previously Colmar Brunton) have been measuring recycling behaviours, understanding and attitudes among Victorians.
- In May 2020, Sustainability Victoria launched a fully fledged marketing communications campaign, Know Your Recycling. In support of this, Kantar Public monitored campaign performance with three implementations of the research - before, during and after the campaign.
- Kantar Public conducted a 'pre' survey of Victorians before campaign launch. This was followed by three implementations of campaign tracking as different elements of the campaign were rolled out.
- This report presents the findings of the third survey of the campaign evaluation, along with historical data about recycling from our ongoing monitor.



Methodology for the survey.

- Kantar Public/Colmar Brunton designed an online survey which was administered to:
 - n=1,001 Victorians in May 2020 ('Pre survey')
 - n=1,008 Victorians in July 2020 ('Part 1')
 - n=1,007 Victorians in October 2020 ('Part 2')
 - n=1,018 Victorians in May 2021 ('Part 3' the survey relating to this report)
- The survey included measures about recycling behaviours and attitudes that were repeated from a survey conducted previously by Kantar Public for Sustainability Victoria.
- Specifically, the last three Parts of the survey have been assessing the impact of the 'Know Your Recycling' campaign.
- The survey sample was stratified to represent the Victorian population by age, gender and location.
- Key sample characteristics from the survey are shown in the table to the right.



Demographic	n=				% (weighted)			
	May '20	Jul '20	Oct '20	May '21	May '20	Jul '20	Oct '20	May '21
Gender								
Male	466	502	500	507	48%	50%	50%	50%
Female	547	503	505	511	52%	50%	50%	50%
Age								
18 to 35	273	331	333	287	31%	33%	33%	33%
36 to 55	372	335	332	330	34%	33%	33%	33%
56+	368	342	342	401	35%	34%	34%	33%
Location								
Metro	759	786	713	689	76%	78%	71%	70%
Regional	254	222	294	329	24%	22%	29%	30%

7 Sample Characteristics



Campaign findings.





In Summary:

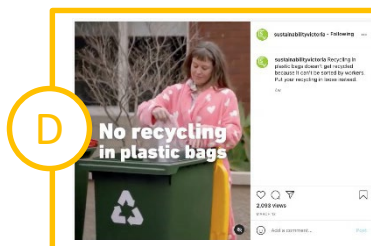
- Overall campaign recognition has increased significantly from 51% in Part 1 and 45% in Part 2 to 53% in Part 3. This brings recognition levels in line with those seen in Part 1 when the campaign was first launched.
- The TVC is again by far the most recognised element of the campaign and has seen a gradual build to 46% recognition over the three surveys.
- After seeing the campaign, more than four-fifths of respondents found it to be easy to understand and agreed it was an appropriate way to communicate the information (82% and 81% respectively).
- However, the campaign was not necessarily seen as new or novel to some Victorians. Only half agreed it showed them something they didn't know (49%). This is not necessarily a negative finding. It may suggest that good recycling practices are becoming embedded in the minds of Victorians.
- Seven in ten Victorians who recognised the campaign (70%) took some form of action. The rates of 'action taking' (i.e., behaviour change) were similar to those seen in previous implementations of the survey.
 - Most commonly, these actions related to thinking about recycling at home (four in ten of those that recalled the campaign), or indeed changing recycling practices at home (over two in ten of those who saw the campaign).
 - Seeking information, either by 'looking it up' or by asking someone else, were less common forms of action.
- Victorians who saw the campaign for the first time in the survey were asked whether they now intend to take any action. Six in ten (60%) intend to take further action, again most commonly to think about recycling and put different types of rubbish/recycling in different bins.





Overview of campaign collateral.

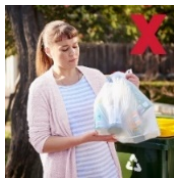
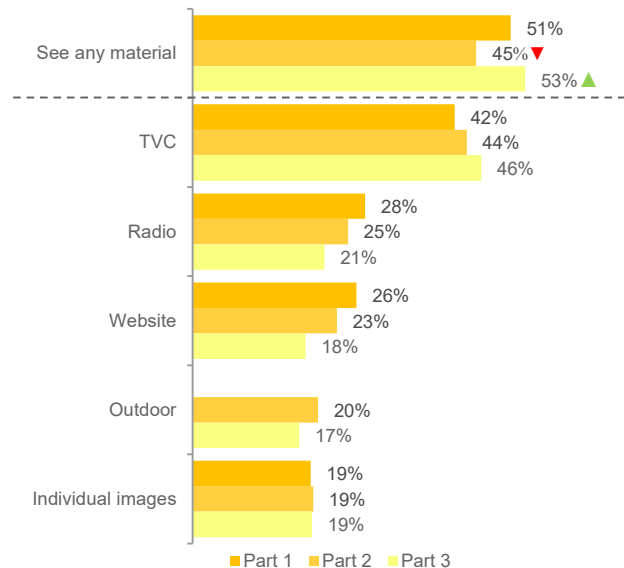
- In Part 3, participants were exposed to five different forms of media during the survey.
 - a) The TVC (video);
 - b) The radio ad (audio);
 - c) The 'hero image' from the campaign website (banner plus message);
 - d) Still images such as those used on the web and social media; and
 - e) An 'out-of-home' poster.





Approximately five in ten Victorians claim to have seen the campaign in May 2021– however, it is more likely that true recognition of the campaign is closer to four in ten.

- Overall, 53% of Victorians recalled at least one of these forms of advertising for the Part 3 survey. This rate of recognition is higher than that seen for Part 2 and similar to that seen in Part 1.
- Awareness of specific collateral was highest for the TVC at nearly five in ten.
- Moderate recognition was seen for radio and website, with lowest recognition seen for the individual images and the outdoor material. (The outdoor collateral was only tested in Parts 2 and 3.)
- Overall campaign recognition was significantly higher for older Victorians compared with middle aged Victorians (60% vs. 47%).
- Minor differences were seen by dwelling type and age (two closely related variables). Younger Victorians (18-35 years) and those in Multi Unit Dwellings (MUDs) were more likely to recognise online collateral. Those in MUDs were less likely to recognise the radio ad.



Q36 Have you seen or heard this campaign? (SR)

Base: All respondents, July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

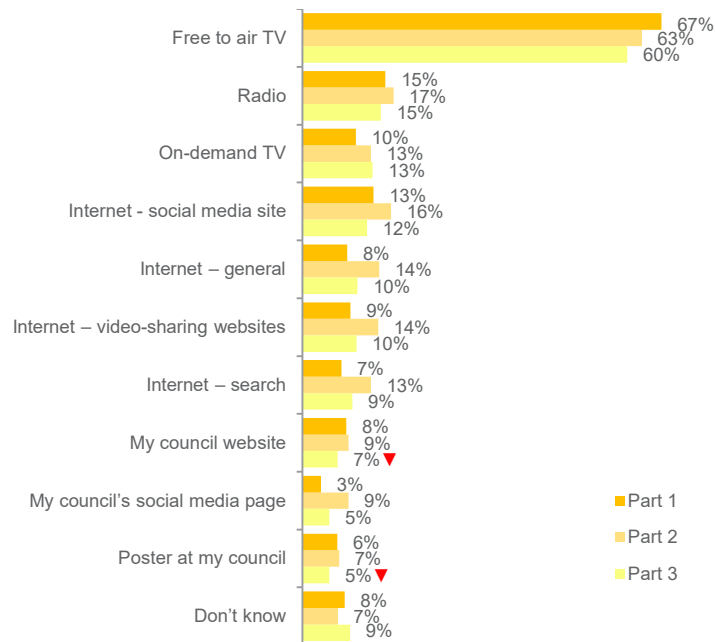
▲ ▼ indicates a significant difference between surveys at 95% confidence.



Recalled media channels for the campaign.

- Participants who recognised any of the campaign collateral were then asked where they remembered seeing it. (The collateral was not labelled 'TVC', 'online', etc. – the images and/or audio were simply shown without context.)
- As was the case for Part 1 and 2 of the survey:
 - By far the highest recalled media was free to air TV at six in ten Victorians;
 - At a distant second were the radio adverts and online collateral – around one in seven;
 - Information from sources related to local councils (website, poster, media page) were least commonly recalled at around one in ten or less.
- Different media channels were recalled quite differently by people from different demographic backgrounds. The table overleaf shows demographic differences by demography.

Source of campaign awareness



Q37. Where did you recall seeing or hearing this campaign? (MR)

Base: All campaign recognisers, July 2020 (n=492), October 2020 (n=455), May 2021 (n=546)

▲ ▼ indicates a significant difference between surveys at 95% confidence.



Recalled media channels for the campaign by demography.

- In general terms:
 - Younger Victorians were less likely to recall the TVC and more likely to recall collateral online.
 - Those in regional areas were more likely to recall the TVC.
 - Note that this is a different measure to the 'recognition of campaign elements' findings reported earlier. Campaign elements were not labelled by media in the survey and were only displayed without context. This question included specific prompts about which media was recalled.

	Gender			Age		Location	
	Total (n=546)	Men (n=266)	Women (n=280)	18-55 (n=306)	56+ (n=240)	Metro (n=351)	Regional (n=195)
Free to air TV	60%	61%	60%	48% ▼	80% ▲	55% ▼	71% ▲
Radio	15%	14%	15%	16%	12%	16%	11%
Internet – social media site	12%	15%	9%	17% ▲	3% ▼	14%	8%
Internet – general	10%	10%	10%	15% ▲	2% ▼	12%	7%
Internet – video-sharing websites	10%	11%	10%	15% ▲	2% ▼	10%	10%

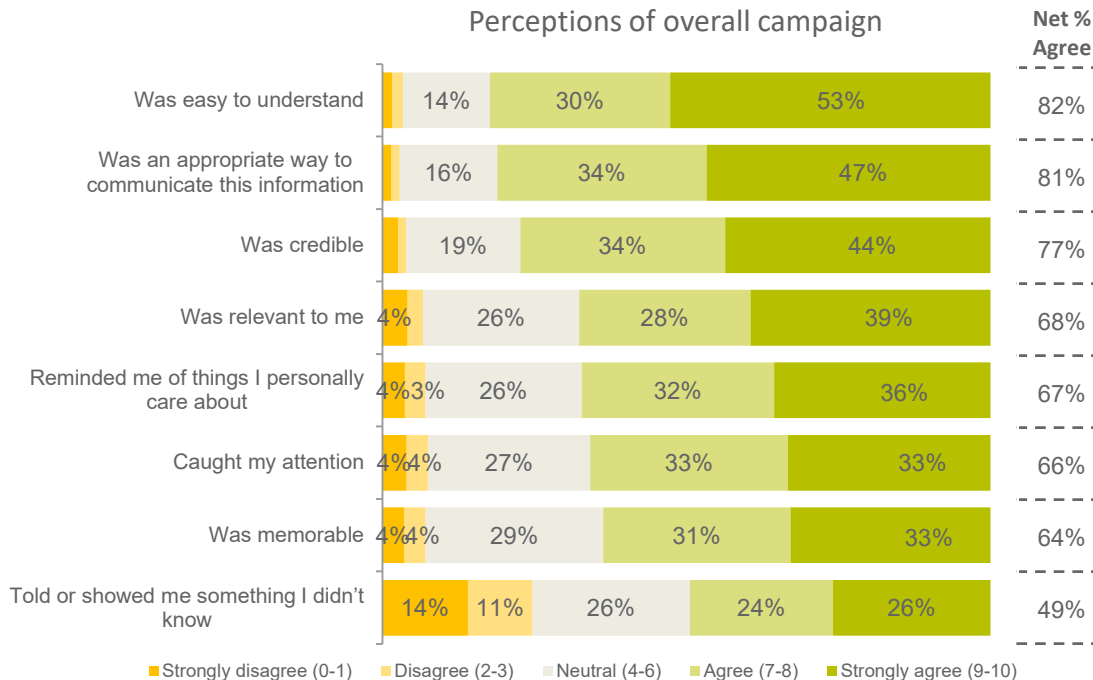
Q37. Where did you recall seeing or hearing this campaign? (MR)

▲ ▼ indicates a significant difference between all other sub-groups at 95% confidence, e.g. males vs. females.



Perceptions of the campaign as a whole.

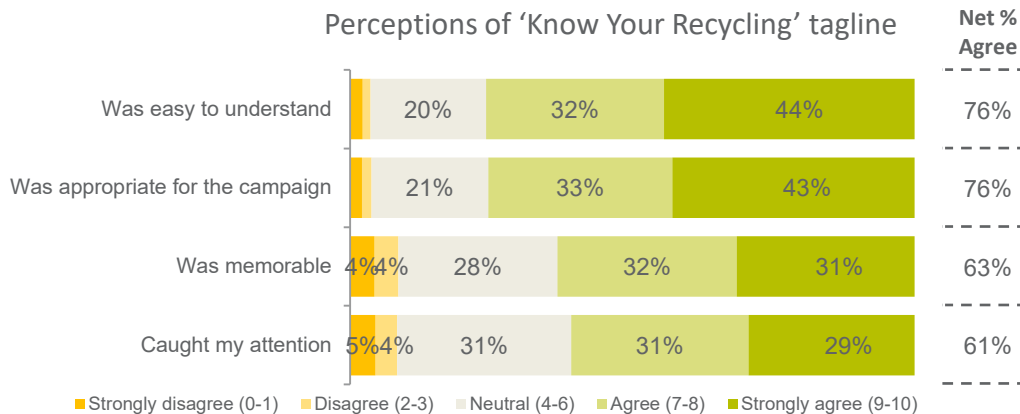
- After seeing the campaign, more than four-fifths of respondents found it to be easy to understand and agreed it was an appropriate way to communicate the information (82% and 81% respectively).
- Between six and eight in ten Victorians also agreed that the campaign as a whole was credible (77%), relevant to them (68%), reminded them of things they care about (67%), attention-grabbing (66%) and memorable (64%).
- Less than one in ten Victorians disagree with any of the statements already mentioned.
- However, the campaign was not necessarily seen as new or novel to some Victorians. Only half agreed it showed them something they didn't know (49%) with one-quarter disagreeing with this statement (25%).
- This is not necessarily a negative finding. It may suggest that good recycling practices are becoming embedded in the minds of Victorians.





Perceptions of the 'Know Your Recycling' tagline.

- Victorians generally felt that the campaign was easy to understand and accessible. Three-quarters of Victorians agree the tagline was easy to understand and appropriate for the campaign (76% each).
- However, fewer perceived the campaign to be memorable or attention grabbing. Six in ten agreed it was memorable (63%) and that it caught their attention (61%).
- Less than one in ten disagree with any of these statements.

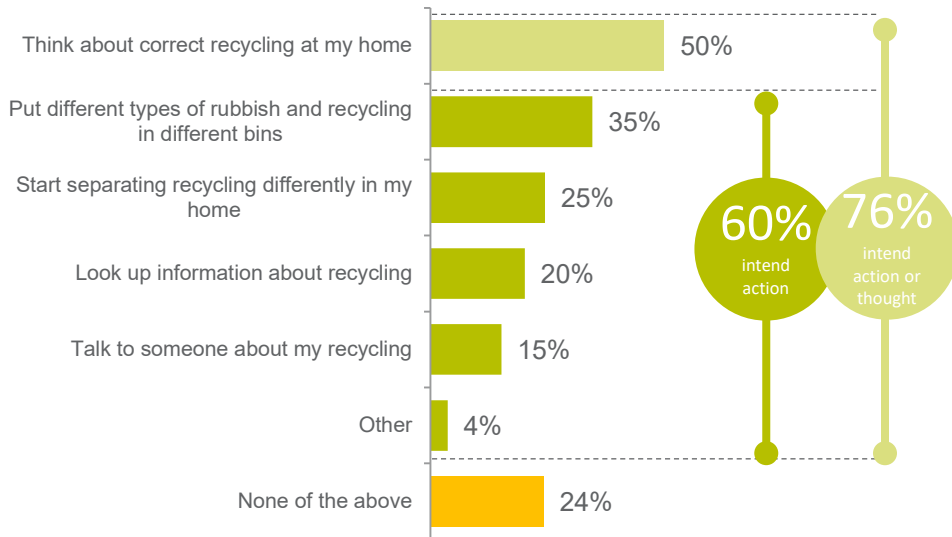




Intentions after seeing campaign – of those who saw the campaign for the first time during the survey.

- All participants who did not recall the campaign were asked whether they intended to take any action after being shown the campaign in the survey.
- Overall, 76% of participants took action, either in the form of simply thinking about recycling, or more behavioural actions such as putting different types of rubbish in different bins.
- 60% indicated that they intended to take some form of tangible action – e.g., changing recycling behaviours.
- Specifically, among these participants, half intend to think about correct recycling as a result of seeing it (50%).
- One-third intend to put different types of rubbish and recycling in different bins (35%), while one-quarter intend to start separating recycling differently in their home (25%).
- One-quarter of respondents do not intend to do any of the given options (24%).

Intentions after seeing campaign – non-recognisers

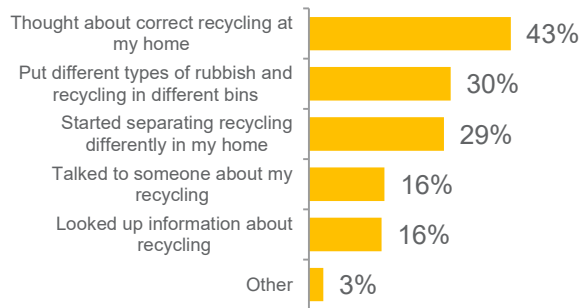




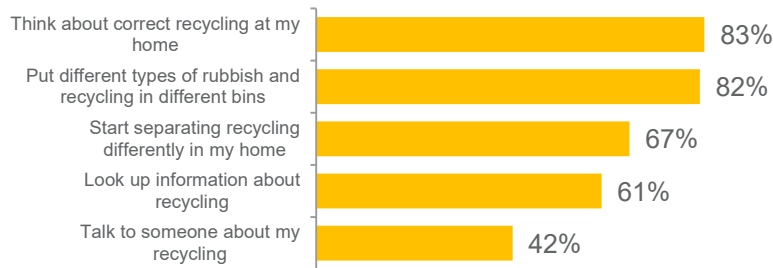
Actions taken after seeing the campaign.

- Among those who had previously seen the campaign, 43% have thought about recycling at their home as a result of seeing it.
- A further one in three started putting different types of rubbish and recycling in different bins (30%), and started separating recycling differently in their home (29%).
- Among those who had not already taken these actions, over four-fifths intend to think about correct recycling at their home, as well as put different types of rubbish and recycling in different bins in the future (83% and 82% respectively).
- A further two-thirds intend to start separating recycling differently in their home (67%), and a slightly smaller proportion intend to look up information about recycling (61%).
- Less than half intend to talk to someone about their recycling as a result of seeing the campaign (42%).

Actions taken after seeing campaign - recognisers



Future intentions



Q38D. After you saw the campaign, have you done any of the following?

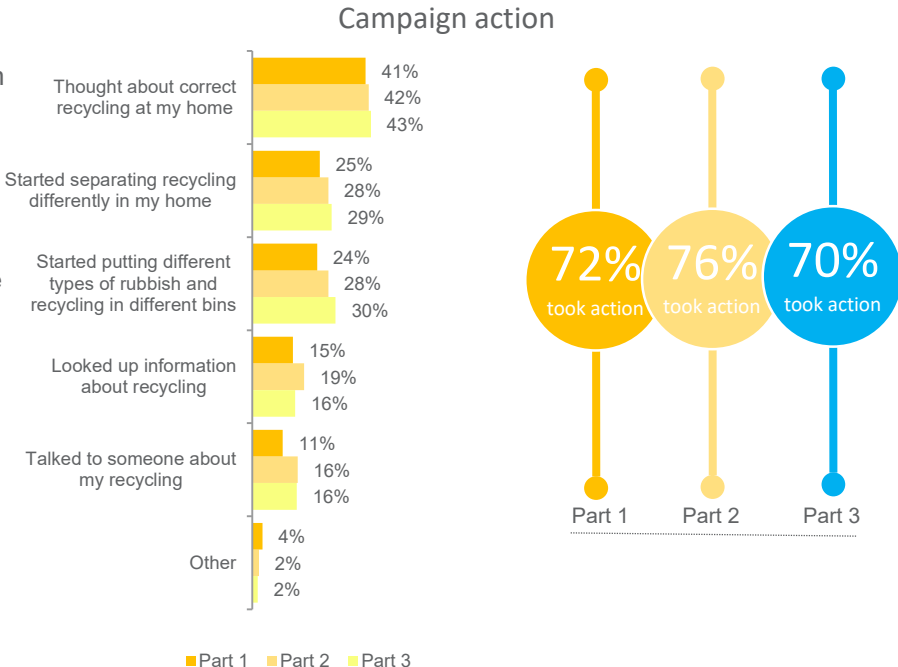
Q38E. Even if you are not doing these things now, do you intend to start doing these things in the future? (SR)

Base: All campaign recognisers, May 2021 (n=546)



Actions resulting from the campaign.

- Overall, 70% of those who recognised the campaign in Part 3 took some form of action. This is slightly lower than the rate of action taking seen for Part 2, though similar to Part 1.
- Most commonly, these actions related to thinking about recycling at home, or indeed changing recycling practices at home (separating and sorting differently).
- Seeking information, either by 'looking it up' or by asking someone else, were less common forms of action.
- The rates for taking action as a result of the campaign were similar for Parts 2 and 3.
- The proportions of Victorians taking any form of action were significantly higher for:
 - Metro dwellers vs. regional (74% vs. 63%); and
 - Younger Victorians vs. middle aged and older (78% vs. 68% and 65%).

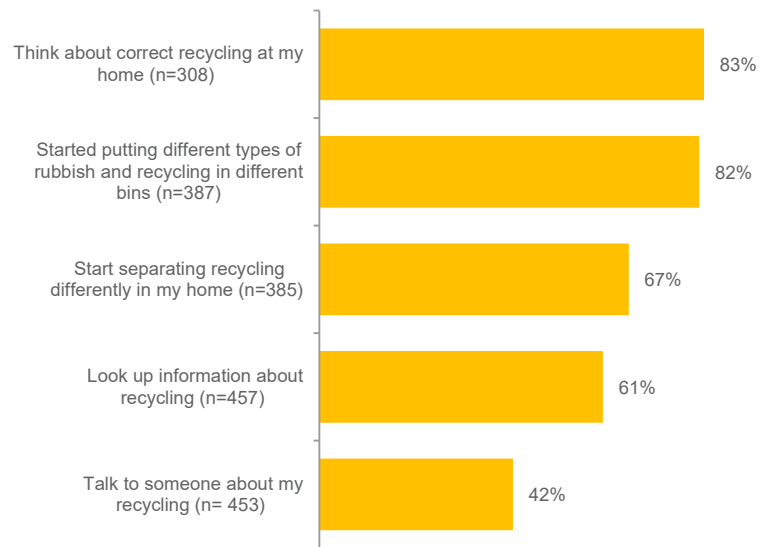




Intended actions – those who were not already taking action.

- Those who recalled the campaign, though had not undertaken actions such as thinking or talking about recycling were asked if they would be likely to do them in the future.
- The rate of intentionality was reportedly high for these Victorians. For example:
 - 83% indicated that they intended to start thinking about recycling;
 - 82% indicated that they intended to start putting different types of rubbish and recycling in different bins; and
 - 67% intended to start recycling differently in their homes.
- It is worth noting that this degree of intentionality for this subpopulation is substantially higher than actual action from those who recognised the campaign (previous slide); and stated intentions from those who did not recognise the campaign and only saw it during the survey (slide 16).

Intended action amongst campaign recognisers

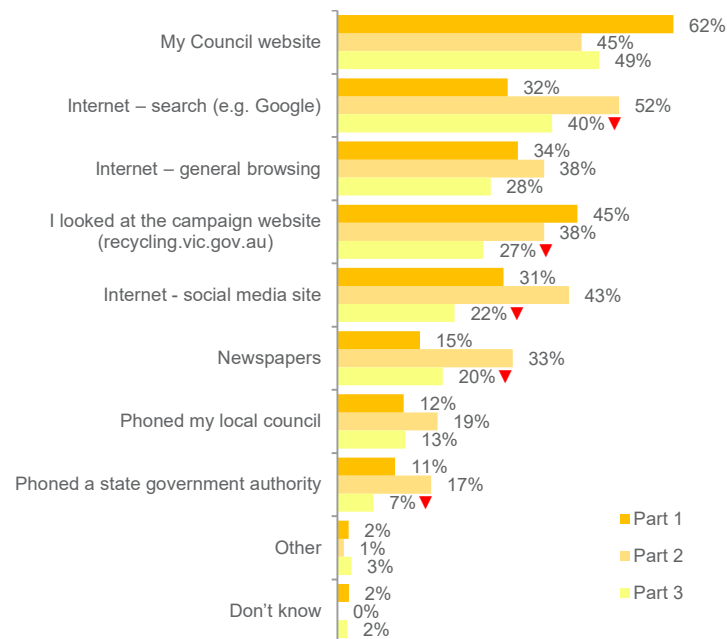




Information sources used after seeing the campaign.

- Council websites remain the most common destination among the few Victorians who sought additional information, however referral onwards to a council website remains lower than in Part 1, though is similar to Part 2.
- Overall declines were seen for seeking further information from general internet searches, the campaign website and social media since Part 2.
- Two in four Victorians who looked up information after seeing the campaign went to www.recycling.vic.gov.au.
 - In terms of a population estimate, this equates to 5% (n=51) of the total population who saw the campaign, sought further information, and went to www.recycling.vic.gov.au.
 - All of the 5% of Victorians who went to the website after seeing the campaign indicated that it was useful.
- Phoning a local or state government authority was a relatively uncommon course of action after seeing the campaign.
- Please note that the base sizes (number of people who answered the question) are quite small here compared with other measures in the survey. This means that comparisons by demography are not possible, and that comparisons between survey Parts should be interpreted with caution.

Source of additional information

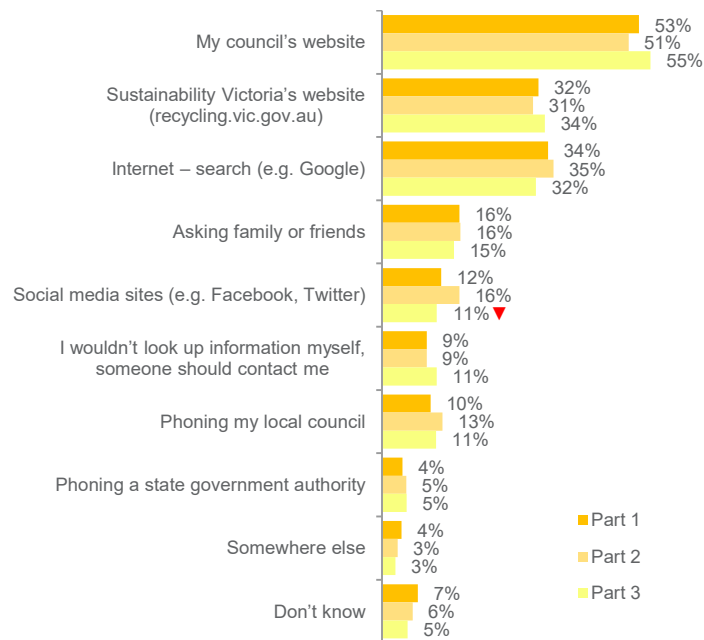




Information sources that would be used in the future.

- All participants, regardless of campaign recognition, were asked where they *would* go if they wanted information about recycling in the future.
- Intended future sources of information have remained relatively stable over the three Parts of the survey.
- Once again, council websites were the most mentioned source of information.
- One third of participants indicated that they would go to www.recycling.vic.gov.au for recycling information.
- General Google searches were third most common.
 - In general terms, younger Victorians were more likely to use only sources such as Google and social media as sources of information compared with their older counterparts.
- Similar to sources of information that had been used in the past, phone contact with government authorities was not a common source of information to be used in the future.

Future recycling information



Q41. In the future it is likely that the types of items accepted in your recycling bin may change. Knowing this, where would you look for information about how recycling has changed? (MR)

Base: All respondents July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

▲ ▼ Indicates a significant difference between surveys at 95% confidence.



Current recycling
knowledge and practice.





In Summary:

- **Practice:** Just under half of Victorians indicated that they had placed an item in the bin that should have been disposed of in another fashion ('incorrect recycling practice' – 46%).
- The rate of incorrect recycling has remained relatively stable across most surveys, *except for the Part 3 survey*, where decreases in incorrect knowledge (i.e., a positive shift) were observed.
- This is true for the total population (53% in Part 2 to 46% in Part 3) and specifically for males (60% compared to 49%).
- This positive shift in practice for all Victorians as well as some subgroups of interest strongly suggests a positive impact from the campaign.
- Despite an observed decrease in incorrect recycling at the total level, the rates of incorrect recycling of individual materials have remained unchanged across the three Parts of the survey (e.g. we did not see substantial change in correct recycling of plastic bags). This suggests that the improvements we have seen in the most recent survey are the result of an aggregated improvement in practice.
- The items that are most commonly recycled incorrectly are still waxed cardboard boxes, plastic bags and glass from broken windows.
- **Knowledge:** Positively, the rate of incorrect recycling knowledge has declined from 73% in Part 2 to 68% in Part 3.
- This decrease in rates of incorrect recycling knowledge can also be seen for males and those living in metro areas.
- We can therefore conclude that awareness of correct recycling knowledge has increased since October 2020 for both the total population and some demographics of interest, again strongly suggesting a positive impact from the campaign.





Current
recycling
practice.





Recyclables vs. non-recyclables.

- The items used in the survey for the correct/incorrect recycling knowledge and practice are listed to the right.



Recycling

Paper and cardboard

Aluminium foil and trays

Glass bottles and jars

Aerosol cans

Milk and juice cartons

Plastic toys

Hard plastic containers

Contamination

Waxed cardboard boxes

Clothing items / textile materials

Plastic bags

Batteries

Glass from broken glasses or windows

Household electrical items

Soft plastics (e.g. bread bags, frozen food bags)

Light globes

Recyclable items wrapped in plastic bags

Ceramics

Food scraps

Ink cartridges

Rubbish in plastic bags

CD cases

Steel pots and pans

CDs/DVDs

Styrofoam packaging

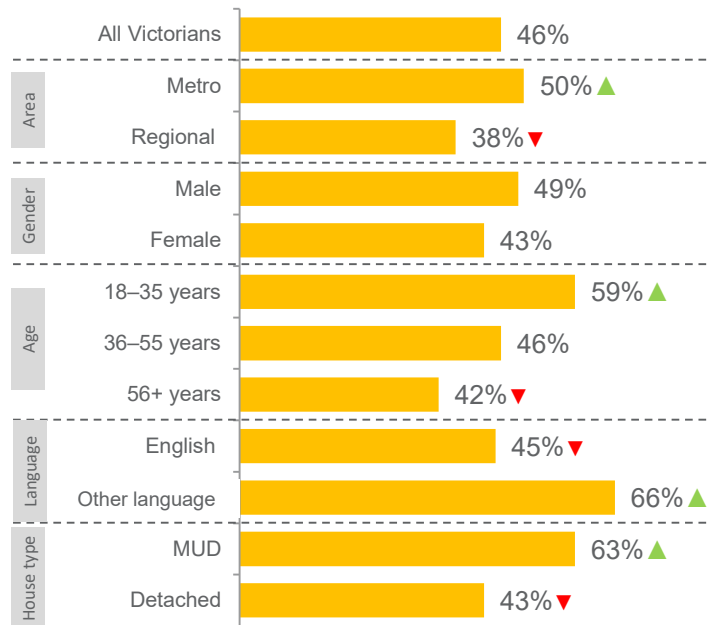
Nappies



Rates of incorrect recycling practice.

- All participants were asked whether they had placed a range of items in the recycling bin in the past month. Some items were recyclable and therefore appropriate to place in the recycling bin; some were not.
- The chart to the right shows the proportion of participants who indicated that they placed at least one incorrect item in their recycling bin.
- Overall, just under half (46%) of Victorians have placed at least one incorrect item in their bin in the past month.
- As has been the case across all Parts of the survey, the rates of incorrect recycling are higher for:
 - Metro vs. regional (50% vs. 38%);
 - Younger Victorians vs. older (59% vs. 42%);
 - People who speak other languages at home vs. English speakers (66% vs. 45%); and
 - Those living in MUDs vs. those in detached homes (63% vs. 43%).

Rate of incorrect recycling practice



Q7. In the last month, which of the following items have you put in the recycle bin/s at your home? (MR)

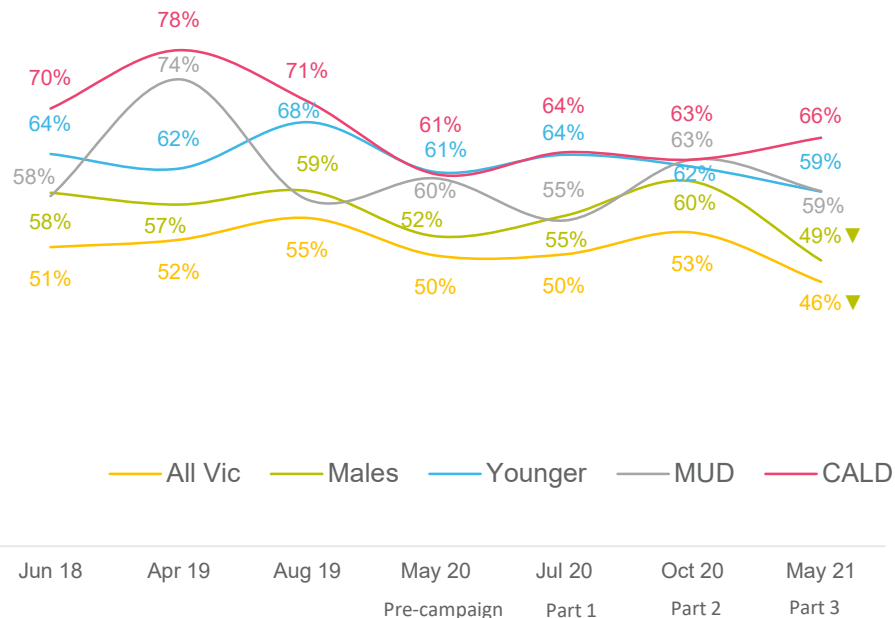
Base: All respondents, May 2021 (n=1,018) ▲ ▼ indicates a significant difference to all other groups at 95% confidence (e.g. metro vs. regional).



Rates of incorrect recycling practice over time.

- This measure of overall incorrect recycling practice has been assessed since June 2018, in addition to the three Parts of this campaign evaluation.
- The analyses have had a particular focus on populations that showed higher rates of incorrect recycling practice (Males, MUDs, younger, etc.).
- The rate of incorrect recycling has remained relatively stable for most populations at most time points, *except for the Part 3 survey*, where decreases in incorrect knowledge (i.e., a positive shift) were observed.
 - The overall rate of incorrect recycling practice for all Victorians (orange bar) remained relatively stable over time, though has seen a decrease in the Part 3 survey - 46% compared to 53% in the previous Part; and
 - The rate for males has typically been slightly higher, approaching 60%, but it has also seen a decrease in this Part (49% compared to 60% in the previous survey).
- This positive shift in practice for all Victorians as well as subgroups of interest strongly suggests a positive impact from the campaign.

Rate of incorrect recycling practice – Over time



Q7. In the last month, which of the following items have you put in the recycle bin/s at your home? (MR)

Note: in July 2020, Steel pots and pans and CD cases were reclassified as non-recyclables. Base: All respondents, June 2018 (n=1,021), April 2019 (n=1,470), August 2019 (n=1,013), May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018).

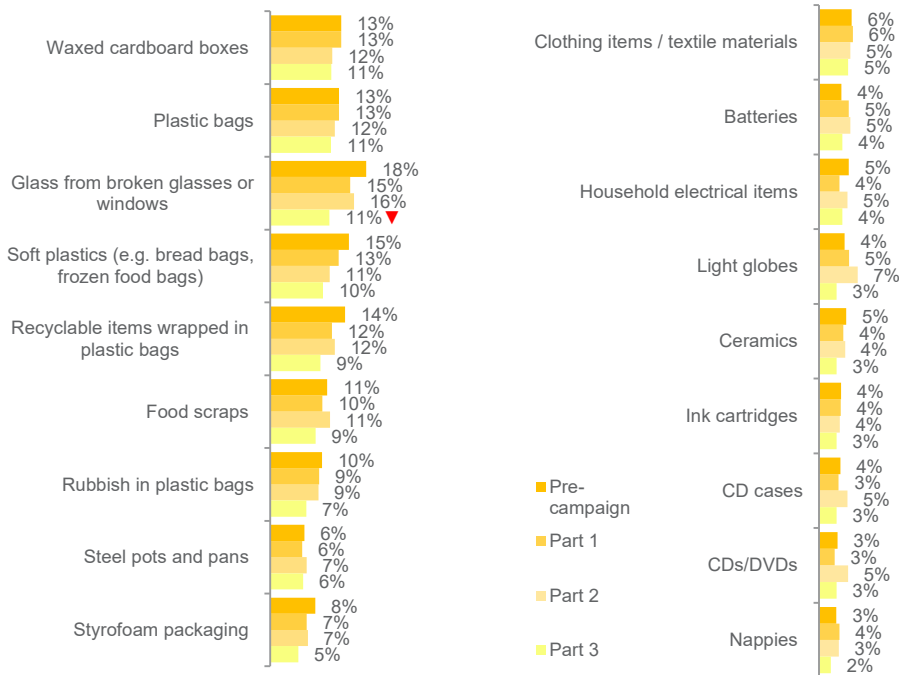
▲ ▼ indicates a significant difference to previous survey at 95% confidence.



Incorrect recycling of individual items.

- Despite an observed decrease in incorrect recycling at the total level, the rates of incorrect recycling of individual materials have remained unchanged across the three Parts of the survey, with the exception broken glass which has seen a decrease (11% vs. 16% previous Part).
- This suggests that the improvements we have seen in the most recent survey are the result of an aggregated improvement in practice, rather than any substantial shift in any one class of item.
- The items that are most commonly recycled incorrectly are still waxed cardboard boxes, plastic bags and glass from broken windows.
- The least common items that are mistakenly placed in the recycling bin are nappies and CDs/cases.

Materials incorrectly recycled



Q7. In the last month, which of the following items have you put in the recycle bin/s at your home? (MR)

Base: All respondents, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

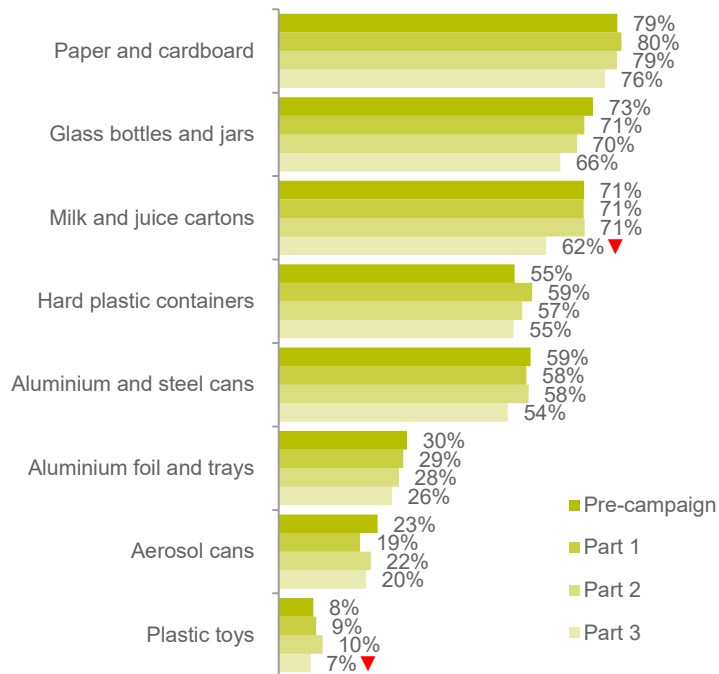
▲ ▼ indicates a significant difference between surveys at 95% confidence.



Correct recycling of individual items.

- Most Victorians are correctly recycling the items that most commonly go in the recycling bin – a set of findings that is largely unchanged across the three Parts of the survey.
- For example, between six and eight in ten Victorians are correctly recycling paper/cardboard, glass bottles/jars and milk/juice cartons.
- The one exception to this trend - the most recent survey has seen a significant decrease in the rate of correct recycling of milk and juice cartons as well as plastic toys, compared to the previous part.

Materials correctly recycled – over last year



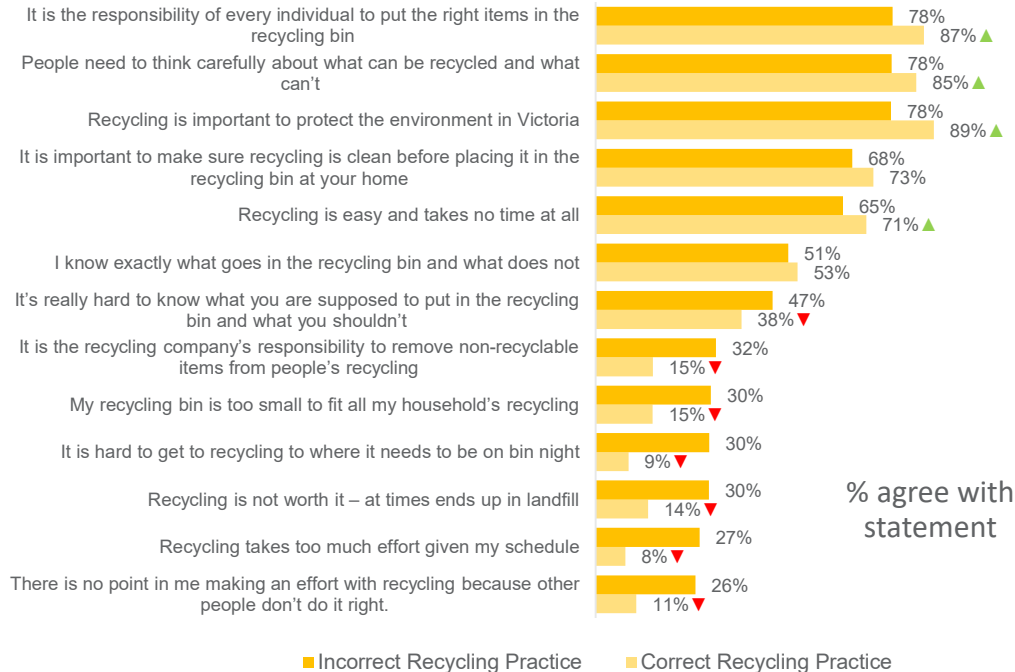
Q7. In the last month, which of the following items have you put in the recycle bin/s at your home? (MR)
Base: All respondents, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

▲ ▼ indicates a significant difference between surveys at 95% confidence.



Incorrect recycling practice vs. recycling attitudes.

- Additional comparative analyses were run to compare rates of incorrect recycling practice against attitudes.
- The findings for Part 3 of the survey are completely consistent with the Part 2 report when this analysis was first conducted - those who recycle incorrectly tend to be indifferent towards good practices.
- They are more likely to think there is no point in recycling correctly or blame their bin for being too small.
- For example, people who recycle incorrectly are also more likely to perceive:
 - It's hard to know what it supposed to go in the recycle bin;
 - It is the recycling company's responsibility to sort recycling;
 - Their recycling bin is too small;
 - Recycling is not worth it, it ends up in landfill;
 - It is hard to get the bin to where it needs to be on bin night;
 - There is no point since others don't do it right; and
 - Recycling takes too much effort.



Q7. In the last month, which of the following items have you put in the recycle bin/s at your home? (MR)

Q9a. How much do you agree or disagree with the following statements? (SR)

Base: All respondents, May 2021 (n=1,018) ▲ ▼ indicates a significant difference to incorrect recycling practice at 95% confidence.



Current
recycling
knowledge.

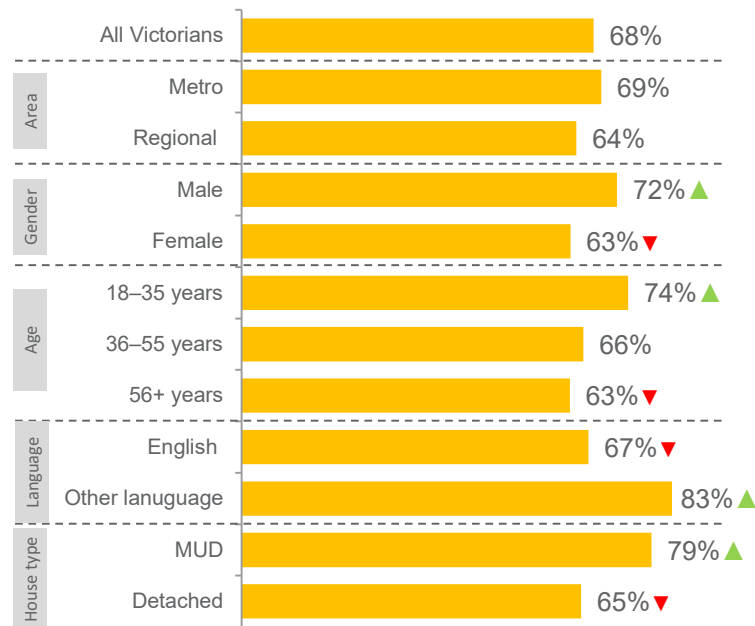




Rates of incorrect recycling knowledge.

- All participants were also asked whether they thought it was acceptable to place a range of recyclable and non-recyclable items in their recycling bin (a measure of knowledge as opposed to the previous 'practice' question).
- Overall, for the Part 3 survey, 68% of Victorians incorrectly identified one or more items that they perceived was OK to put in the recycling bin.
- As seen in previous surveys and across other measures in the current survey, rates of incorrect knowledge were higher for:
 - Men vs. women (72% vs. 63%); and
 - Younger vs. older Victorians (74% vs. 63%)
 - Victorians who spoke other languages at home vs. those who spoke English only (83% vs. 67%).
 - Those living in Multi Unit Dwellings vs. those living in detached homes (79% vs. 65%).

Incorrect recycling knowledge

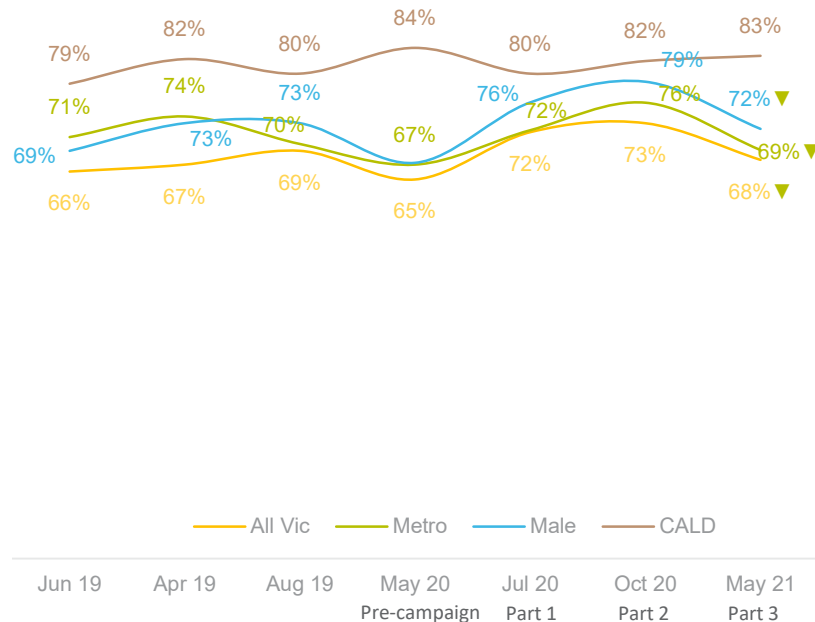




Rates of incorrect recycling knowledge over time.

- Overall, the rate of incorrect recycling knowledge (orange line) has declined from 73% in Part 2 to 68% in Part 3. This positive shift (i.e., the reduction in incorrect knowledge) is statistically significant and a strong indicator of the impact of the campaign over time.
- This decrease in rates of incorrect recycling knowledge in this Part can also be seen for males and those living in metro areas (though not for CALD Victorians).
- The rates of incorrect knowledge for younger people has not changed significantly over the lifespan of the campaign and is not tracked here.
- We can therefore conclude that awareness of correct recycling practices has increased since October 2020 for both the total population and demographics of interest, excluding CALD.

Incorrect recycling knowledge – Over time



Q8. Is it OK to put the following items in your recycling bin/s at your home for recycling? (MR)

Base: All respondents, June 2018 (n=1,021), April 2019 (n=1,470), August 2019 (n=1,013), May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018).

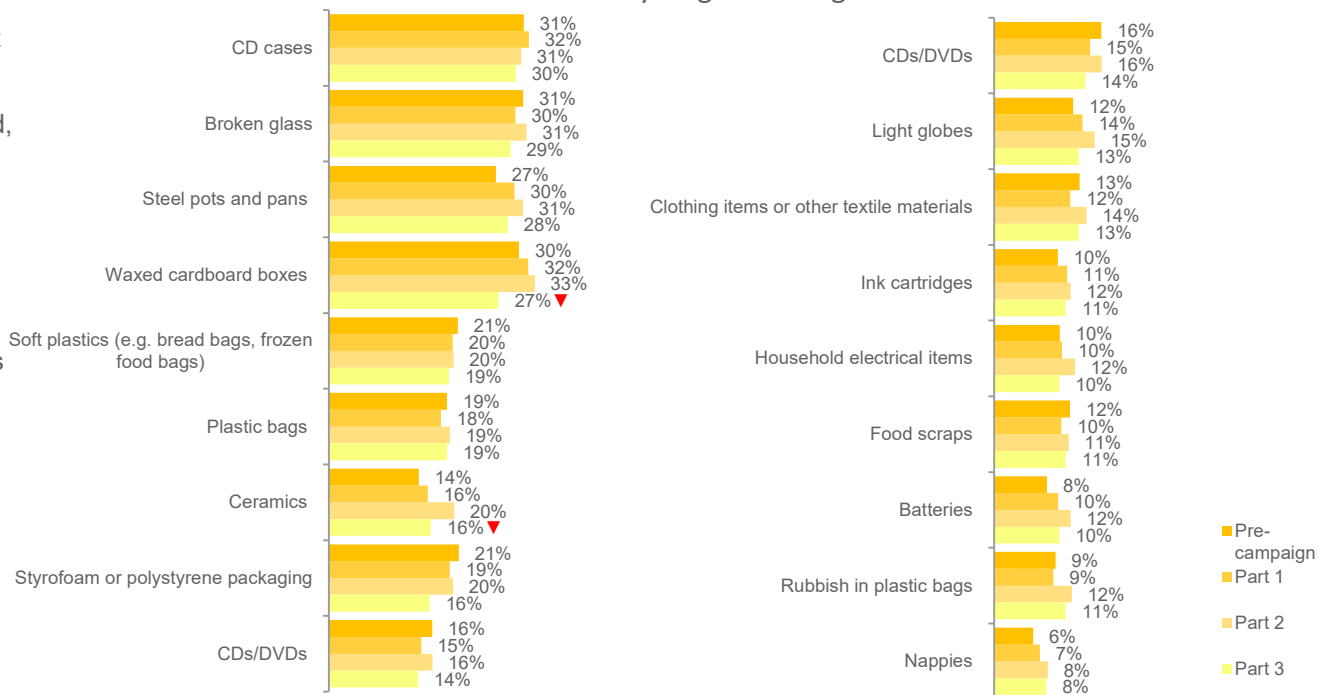
▲ ▼ indicates a significant difference to previous survey at 95% confidence.



Incorrect knowledge of specific individual items for recycling.

- Victorians most commonly perceive that CD cases, broken glass (such as that from windows), steel pots and pans and waxed cardboard boxes can be recycled, even though these items cannot be recycled using current systems in the state.
- Batteries, rubbish in plastic bags and nappies are rarely recycled incorrectly.
- There has been little change in the rates of incorrect recycling knowledge for individual items over the three Parts of the survey.

Incorrect recycling knowledge – over time



Q8. Is it OK to put the following items in your recycling bin/s at your home for recycling? (MR)

Base: All respondents, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

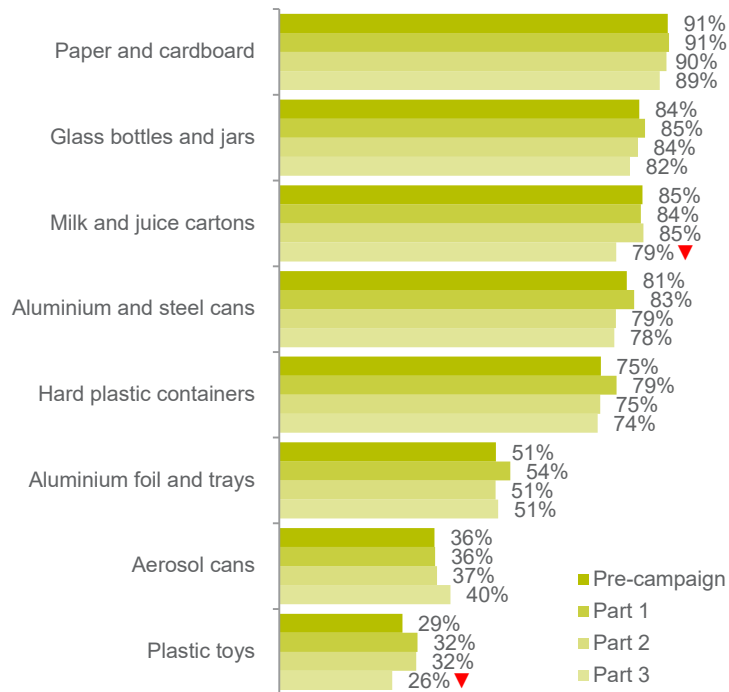
▲ ▼ indicates a significant difference between surveys at 95% confidence.



Correct knowledge of specific individual items for recycling.

- Most Victorians demonstrate a good understanding of the household items that can be recycled via their recycling bins.
- For example, almost all Victorians correctly identify that paper and cardboard; glass bottles and jars; and milk and juice cartons can be placed in the recycle bin for subsequent recycling.
- Fewer Victorians are aware that aluminum foil, aerosol cans and plastic toys can be recycled.
- Both milk and juice cartons and plastic toys have seen a significant decrease in rates of recycling knowledge compared to the previous Part.

Correct recycling knowledge – over time



Q8. Is it OK to put the following items in your recycling bin/s at your home for recycling? (MR)

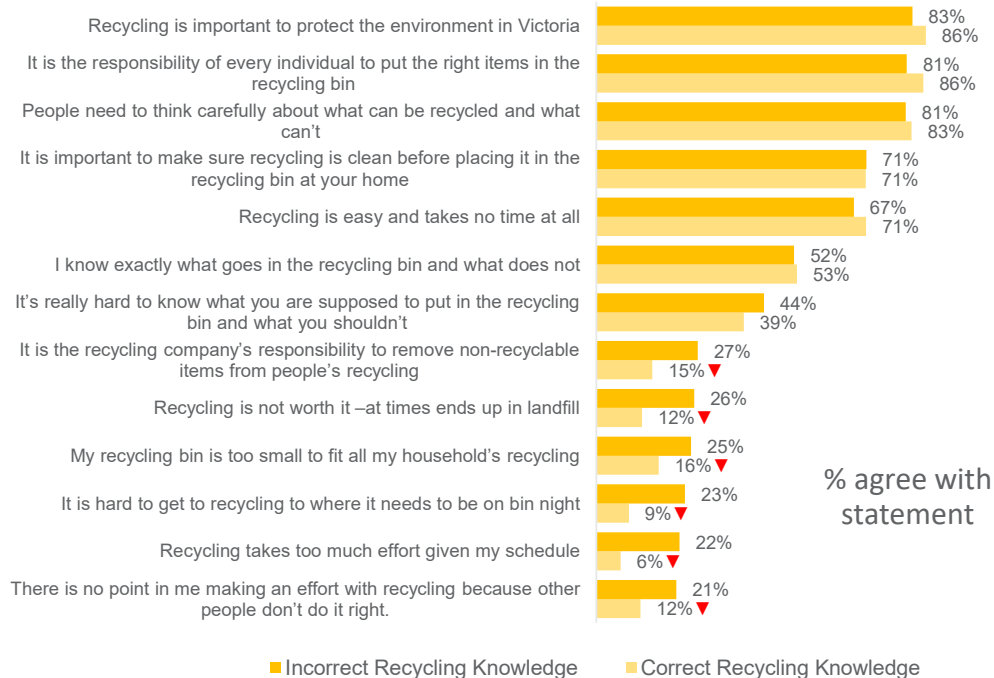
Base: All respondents, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

▲ ▼ indicates a significant difference between surveys at 95% confidence.



Incorrect recycling knowledge vs. recycling attitudes.

- Additional comparative analyses were run to compare rates of incorrect recycling knowledge against attitudes (similar to practice vs. attitudes shown on Page 28).
- Those who are unaware of correct recycling practices maintain the same indifferent attitudes as those exhibiting incorrect practices. This finding is again consistent across Parts 2 and 3 of the survey.
- Further, people with incorrect recycling knowledge demonstrate a range of sometimes contradictory points of view.
- For example, those with lower levels of recycling knowledge are more likely to perceive that:
 - It is the recycling company's responsibility to sort recycling;
 - Their recycling bin is too small;
 - Recycling is not worth it as it all ends up in landfill;
 - It is hard to get the bin to where it needs to be in on bin night;
 - There is no point recycling properly as others do not do it right; and
 - Recycling takes up too much time.



Q8. Is it OK to put the following items in your recycling bin/s at your home for recycling? (MR)

Q9a. How much do you agree or disagree with the following statements? (SR)

Base: All respondents, July 2020 (n=1,008) ▲ ▼ indicates a significant difference to incorrect recycling knowledge at 95% confidence.



Knowledge and
practice in
relation to the
campaign.





Attitudes towards recycling





In Summary:

- The overall findings from attitudinal measures from the Part 3 survey are very similar to those from Part 2.
- Overall, Victorians are very positive about the importance and benefits of recycling, even if they are sometimes less positive about the practicalities of their own recycling.
- For example, around eight in ten agree:
 - It is the responsibility of all Victorians to put the right items in their recycling bin;
 - Recycling is important to protect the environment; and
 - People need to think carefully about what can and can't be recycled.
- However, when it comes to practicalities: four in ten believe that it is hard to know what goes in their recycling bin. Over two in ten perceive that their recycling bin is too small.
- However, some topical shifts in findings were observed since the Part 2 survey:
 - There has been a significant decrease in the proportion of Victorians who perceive that 'recycling is easy and takes no time at all' (73% to 68%). This perhaps reflects the additional cognitive load associated with changing recycling requirements in Victoria relating to FOGO and the four glass bin.
 - Further, the perception that it is 'hard to know what goes in the recycling bin' has increased in this third Part (36% to 42%). Similar to the comment on the previous page, this perhaps reflects recent changes in Victoria such as the roll-out of FOGO and four-bin.

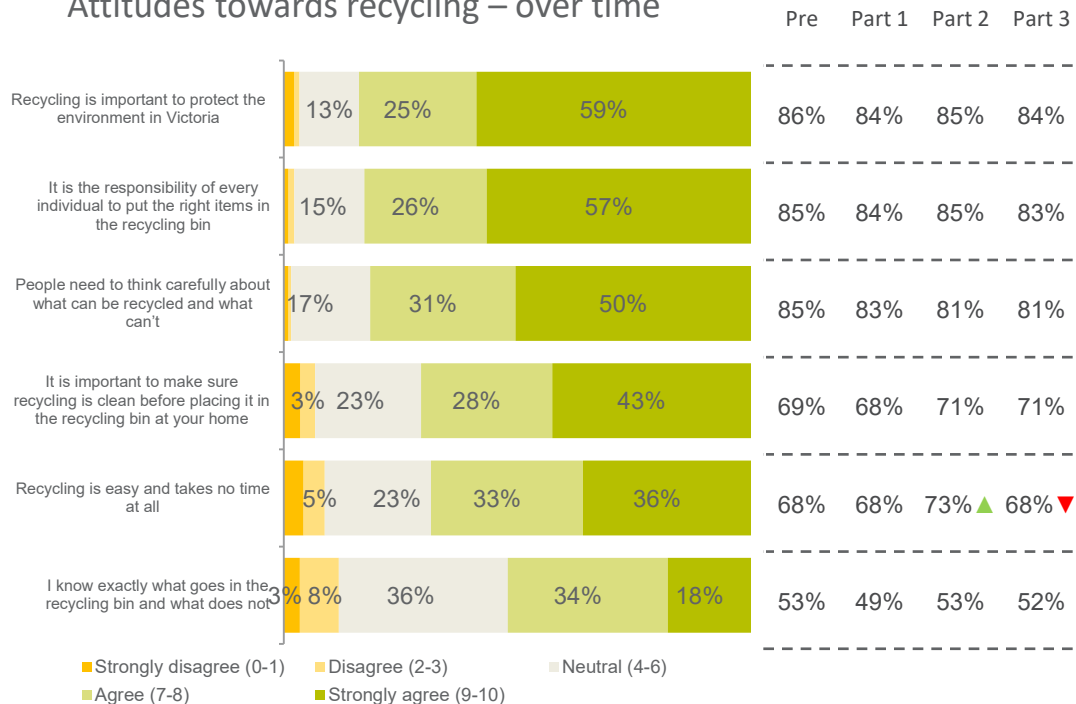




Common attitudes towards recycling.

- As demonstrated in previous surveys, Victorians hold very positive and constructive attitudes towards recycling both for themselves and for the community.
- For example, in Part 3 most Victorians agree:
 - Recycling is important to protect the environment in Victoria;
 - It is the responsibility of all Victorians to put the right items in their recycling bins; and
 - People need to think carefully about what can/can't be recycled.
- However, there has been a significant decrease in the proportion of Victorians who perceive that 'recycling is easy and takes no time at all' (73% agree to 68% agree). This perhaps reflects the additional cognitive load associated with changing recycling requirements in Victoria relating to FOGO and the fourth glass bin.
- No other significant shifts in attitude were observed over the last three Parts of the survey.

Attitudes towards recycling – over time



Q9. How much do you agree or disagree with the following statements? (SR)

Base: All respondents, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

▲ ▼ indicates a significant difference between surveys at 95% confidence. Note: labels <3% not shown.



Common recycling attitudes by demographics.

- Overall, younger Victorians are slightly less positive in their attitudes towards recycling compared with older Victorians. For example, 78% of Victorians aged 18-35 agree that 'recycling is important to protect the environment in Victoria', compared with 89% of Victorians aged 56+.

	Gender			Age			Location		Language	
	Total (n=1,018)	Men (n=507)	Women (n=511)	18-35 (n=287)	36-55 (n=330)	56+ (n=401)	Metro (n=689)	Regional (n=329)	English only (n=952)	CALD (n=119)
It is the responsibility of every individual to put the right items in the recycling bin	83%	80%	85%	78%	82%	88% ▲	81%	86%	83%	81%
Recycling is important to protect the environment in Victoria	84%	81%	87%	78% ▼	84%	89% ▲	83%	86%	84%	85%
People need to think carefully about what can be recycled and what can't	81%	79%	84%	76%	80%	89% ▲	80%	84%	82%	80%
It is important to make sure recycling is clean before placing it in the recycling bin at your home	71%	70%	71%	63% ▼	70%	78% ▲	68%	76%	71%	68%
Recycling is easy and takes no time at all	68%	68%	69%	65%	69%	71%	66%	74%	69%	61%
I know exactly what goes in the recycling bin and what does not	52%	55%	49%	48%	52%	56%	50%	56%	52%	60%

Q9. How much do you agree or disagree with the following statements? (SR)

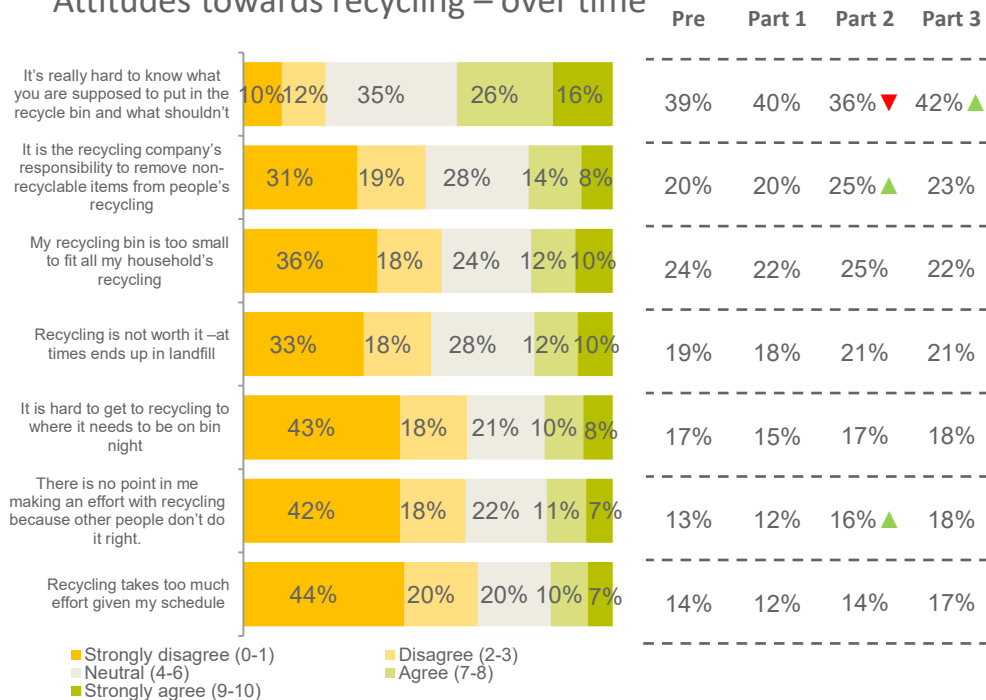
▲ ▼ indicates a significant difference between all other sub-groups at 95% confidence, e.g. males vs. females.



Less common attitudes towards recycling.

- As per Parts 1 and 2, Victorians also expressed some more negative attitudes towards recycling, though the overall tone remains positive.
- For example, four in ten Victorians perceive that it is 'really hard to know what is supposed to go in the recycle bin'.
- From a logistical perspective, one in five perceive that their bin is too small.
- Similar proportions perceived that it was the recycling company's responsibility to sort recycling, and/or that recycling is not worth it as items end up in landfill.
- The perception that it is 'hard to know what goes in the recycling bin' has increased in this third Part. Similar to the comment on the previous page, this perhaps reflects recent changes in Victoria such as the roll-out of FOGO and four-bin.

Attitudes towards recycling – over time



Q9. How much do you agree or disagree with the following statements? (SR)

Base: All respondents, August 2019 (n=1,013), May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

▲ ▼ indicates a significant difference between surveys at 95% confidence. Note: labels <3% not shown.



Less common recycling attitudes by demographics.

- Consistent attitudinal patterns were observed by gender, age, and to a lesser extent cultural background. In general terms:
 - Those who speak only English tended to have more negative attitudes than those who come from a CALD background (for example, a more prevalent perception that it is the recycling company's responsibility to sort recycling).
 - Younger Victorians are more negative than older Victorians (for example, a more prevalent perception recycling is too much effort).

	Gender			Age			Location		Language	
	Total (n=1,018)	Men (n=507)	Women (n=511)	18-35 (n=287)	36-55 (n=330)	56+ (n=401)	Metro (n=689)	Regional (n=329)	English only (n=952)	CALD (n=119)
It's really hard to know what you are supposed to put in the recycle bin and what you shouldn't	42%	42%	42%	48%	44%	34% ▼	43%	39%	42%	48%
My recycling bin is too small to fit all my household's recycling	22%	22%	22%	35% ▲	23%	9% ▼	22%	21%	21%	32%
Recycling is not worth it –at times ends up in landfill	23%	25%	17%	28% ▲	22%	14% ▼	22%	19%	20%	31%
It is the recycling company's responsibility to remove non-recyclable items from people's recycling	21%	25%	21%	32% ▲	24%	13% ▼	25%	17%	21% ▼	40% ▲
It is hard to get the recycling to where it needs to be on bin night	18%	20%	17%	28% ▲	21%	6% ▼	20%	15%	17% ▼	30% ▲
There is no point in me making an effort with recycling because other people don't do it right.	18%	21%	15%	26% ▲	22%	6% ▼	20%	13%	17% ▼	30% ▲
Recycling takes too much effort given my schedule	17%	19%	14%	27% ▲	18%	6% ▼	18%	13%	15% ▼	33% ▲

Q9. How much do you agree or disagree with the following statements? (SR)

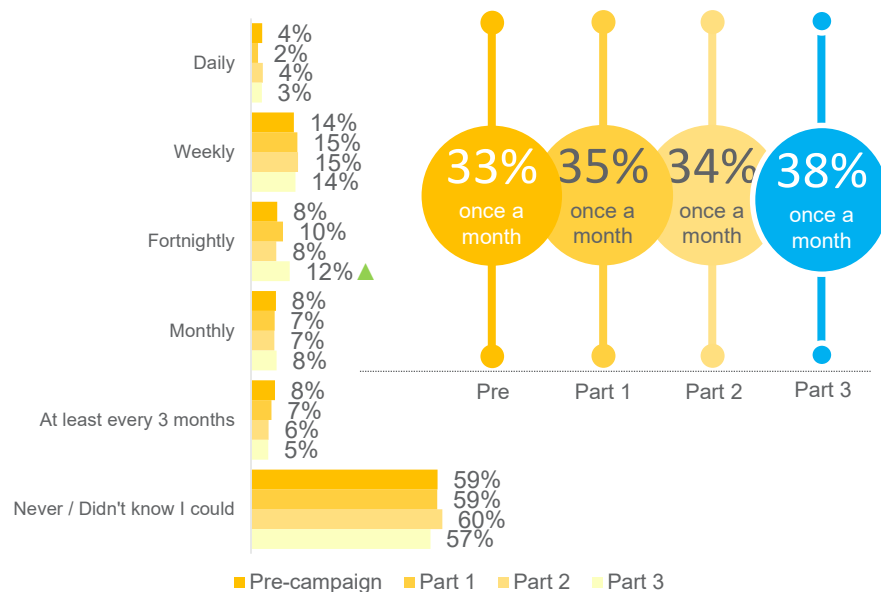
▲ ▼ indicates a significant difference between all other sub-groups at 95% confidence, e.g. males vs. females.



Usage of out-of-home soft plastic recycling bins.

- In Victoria, there are soft plastic recycling points available at many supermarkets.
- Overall, nearly one in four Victorians use these soft plastic disposal facilities monthly or more often – a finding that is virtually identical to all previous survey iterations.
- Specifically for Part 3 of the survey 3% use these facilities daily, 14% weekly, 12% fortnightly and 8% monthly.
- Usage of soft plastic deposit bins is more common among:
 - Younger Victorians (50% monthly +) compared with older Victorians (26%);
 - Those living in MUDs (50%) compared with those in detached homes (35%); and
 - Those living in metro areas (41%) compared with those living in regional areas (30%).
- It is possible that there is some interaction between the three differences described above, as there is considerable overlap present across these demographics.
- There has been an increase in the proportion of Victorians who use soft plastic disposal bins fortnightly, compared with the previous Part.

Frequency of soft plastic disposal (using collection bins)



Q32. How frequently, if ever, do you take soft plastics like bread bags and chip packets to the supermarket and put them in plastic recycling collection bins? (SR)

Base: All respondents May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

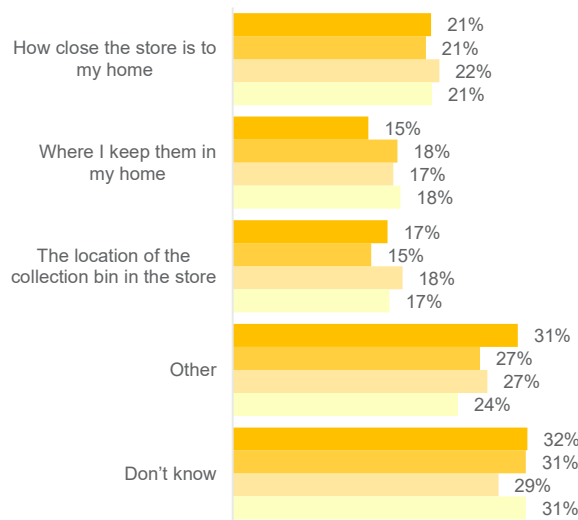
▲ ▼ indicates a significant difference between surveys at 95% confidence.



Barriers and enablers of out-of-home soft plastic recycling bins.

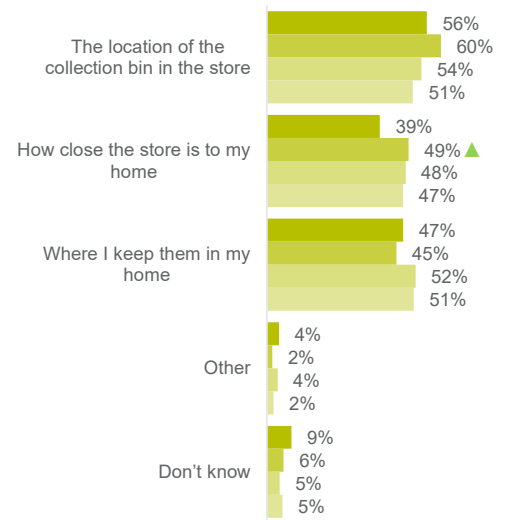
- Victorians who used soft plastic disposal bins were asked what made it hard or easy to use these facilities. Findings for the Part 3 survey are largely unchanged from previous surveys.
- The most common enablers of using these facilities were purely practical – the location of the bin at the facility and the proximity of the facility to the home.
- On the flip-side, a lack of proximity to facility and prominence of bins were the greatest barriers to uptake.
- These barriers and enablers have been relatively constant across the three Parts of the survey.
- Given the prevalence and ready availability of these bins in Victoria, it is likely that *awareness* of the bins at local supermarkets, etc. is driving these perceived practical barriers.
- A relatively large number of Victorians listed other barriers to using these bins. Some examples are listed overleaf.

Barriers of soft plastic deposit



■ Pre-campaign ■ Part 1 ■ Part 2 ■ Part 3

Enablers of soft plastic deposit



■ Pre-campaign ■ Part 1 ■ Part 2 ■ Part 3

Q33. What makes it easy for you to take soft plastics to the supermarket and put them in soft plastic collection bins? (MR) Q34. What makes it hard for you to take soft plastics to the supermarket and put them in plastic recycling collection bins? (MR)

Base: All respondents who regularly drop off soft plastics, May 2020 (n=401), July 2020 (n=353), October 2020 (n=398), May 2021 (n=504)

▲ ▼ indicates a significant difference between surveys at 95% confidence.



Barriers of out-of-home soft plastic recycling bins – other responses.

- Other barriers that Victorians perceive relate to a lack of knowledge, a lack of (perceived) availability of bins at specific supermarkets, difficulty remembering to take the plastic when going to a bin location, and a preference to re-use plastic bags for other purposes.
- A small number of participants also cited lockdown restrictions due to COVID as a barrier to using the soft plastic bins.

Use them as rubbish bags

Often forget to take it

I've never seen a bin

I'm not sure if my supermarket does this

No convenient place to store them at home

Can't be bothered

I have never heard of this

I don't have that service in my area

Washing and drying and storing the plastic before getting around to taking them back to the store

There are too many locations to store different items

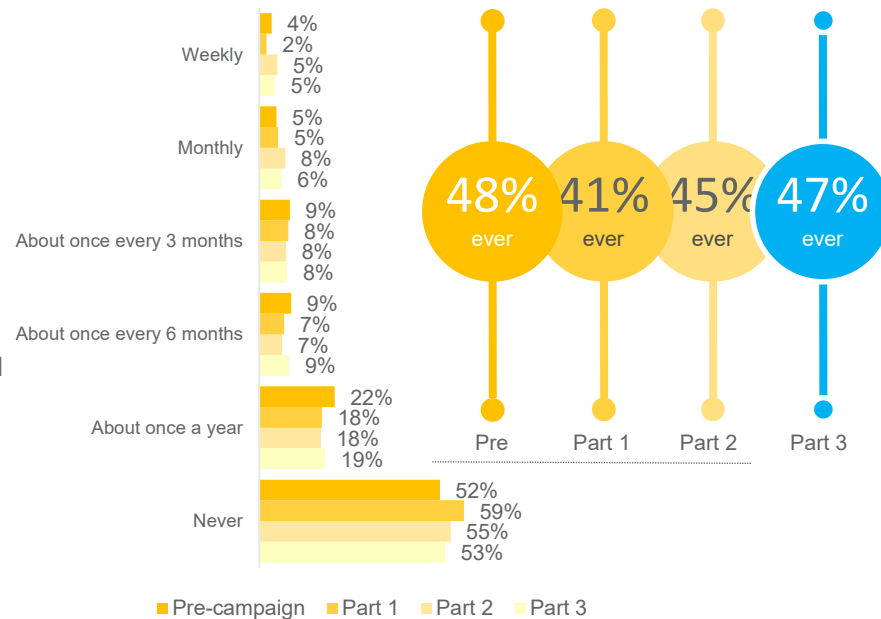
COVID



Usage of council websites to source information about recycling.

- As has been the case for Parts 1 and 2 of the survey, between four and five in ten Victorians had ever sought information about recycling from a council website.
- Specifically for Part 3, 5% use council websites weekly, 6% monthly, 8% 3-monthly, 9% 6-monthly and 19% yearly.
- Those who come from a CALD background were more likely to have used a council website compared with those who only speak English (63% vs. 45%).
- Usage of council websites to attain information about recycling has not changed significantly over the three Parts of the survey.

Frequency of researching local council recycling information





Reasons for usage of council websites.

- Participants who used council websites for information about recycling were asked why they turned to this channel of information.
- These participants most commonly perceived that these websites provided the most up-to-date information, followed by perceptions that council websites were easy to navigate and locate the required information.
- Typical reasons for visiting these websites included uncertainty about what does and does not go in the recycling bin, and the desire for a one-stop-shop of information that need only be accessed once.
- Reasons for using council websites for recycling information have not changed over the three survey implementations.

Reasons for using council websites for recycling information

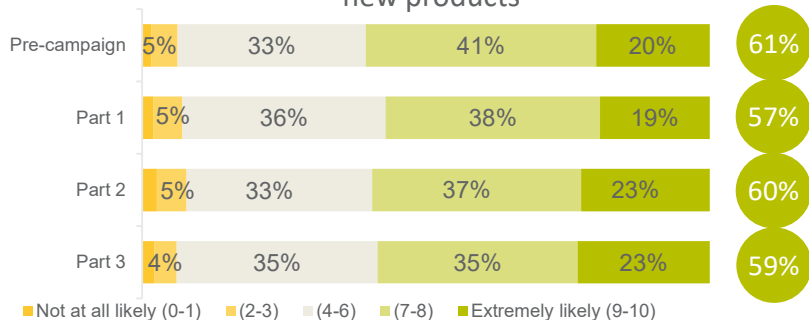




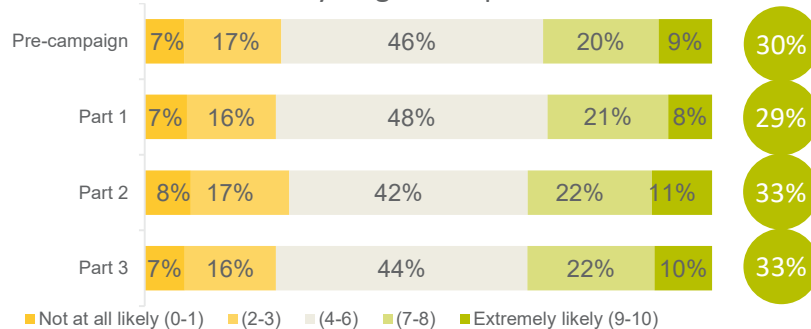
Perceptions of recycling outcomes.

- Most Victorians perceived that recycling eventually gets recycled into new products. Six in ten believe this to be likely, and only one in twenty think this to be unlikely. The remainder are neutral in their perceptions.
- No demographic differences were observed for this measure, nor were any upward or downward trends over time.
- Far fewer Victorians perceive that recycling ends up in landfill. Only three in ten think this scenario is likely. A further one in four perceive that it is unlikely and around four in ten are neutral in their opinion.
- Younger Victorians were more likely to hold this opinion than older Victorians (39% vs. 24%).
- Again, no notable trends over time were observed.

Recycling does eventually get recycled into new products



Recycling ends up in landfill



Q30. On a scale of 0-10, how likely do you think it is that your recycling...? (SR)

Q31. On a scale of 0-10, how likely do you think it is that your recycling ends up in landfill? (SR)

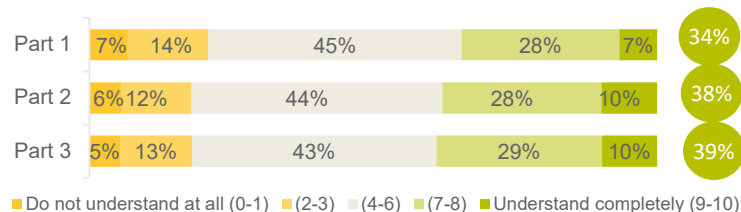
Base: All respondents May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)



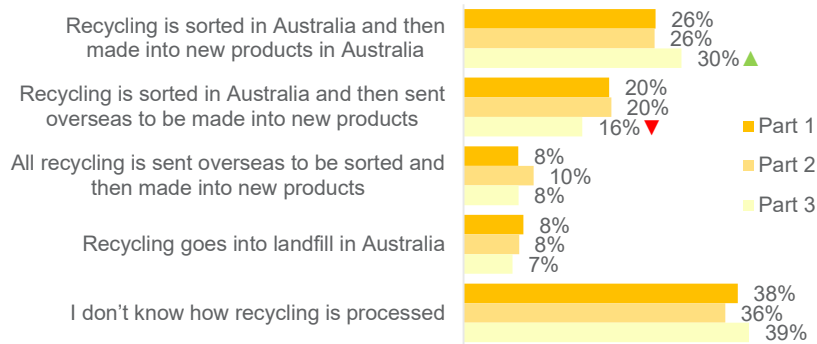
Levels of understanding of Victoria's recycling system.

- Relatively few Victorians claim to have a good understanding of Victoria's recycling system. Nearly four in ten Victorians claimed a good understanding of the system in Part 3, similar to Parts 1 and 2 (the question was not asked pre-campaign).
- Those living in MUDs have a higher level of understanding of the recycling system than those living in detached homes (51% vs. 36%). No other demographic differences were observed for this measure.
- Participants were then given four options about the recycling system and asked to choose which best described their perceptions of how the system works.
 - Nearly one third perceived that 'recycling is sorted in Australia and then made into new products in Australia' - a significant *increase* since the previous survey, suggesting an easing of negative opinions about recycling being shipped overseas;
 - One sixth perceived that 'recycling is sorted in Australia and then sent overseas to be made into new products' – a significant *decrease* since the previous Part, again suggesting that negative sentiment around the export of Australia's recycling is on the decline.
- Women were more likely to report 'don't know' for this measure (44% vs. 35% men). Men, however, were more likely to report that 'recycling is sorted in Australia and then sent overseas to make new products' (19% vs 13% women).
- Furthermore, younger Victorians were more likely than older Victorians to report that 'all recycling is sent overseas to be sorted and then made into new products' (11% vs. 4%) and that 'recycling goes into landfill in Australia' (10% vs. 3%).

Understanding of recycling system



Understanding of recycling processing



Q35A. On a scale of 0-10, to what extent do you understand how Victoria's recycling system works? (SR)

Q36A. And from the list below, which statement best describes how recycling is processed in Victoria once it is collected from your household recycling bin? (SR)

Base: All respondents July 2020 (n=1,008), October 2020 (n=1,007), May 2021 (n=1,018)

▲ ▼ indicates a significant difference between surveys at 95% confidence

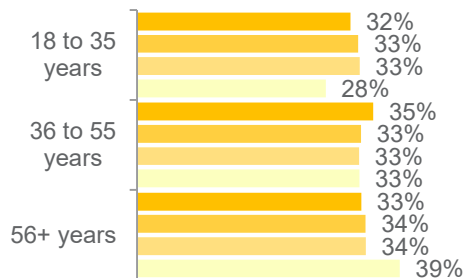


Appendices

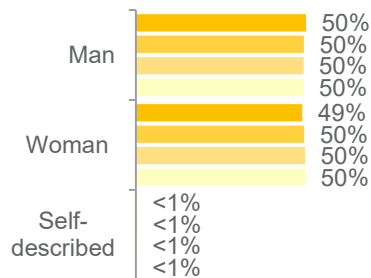


Demographics.

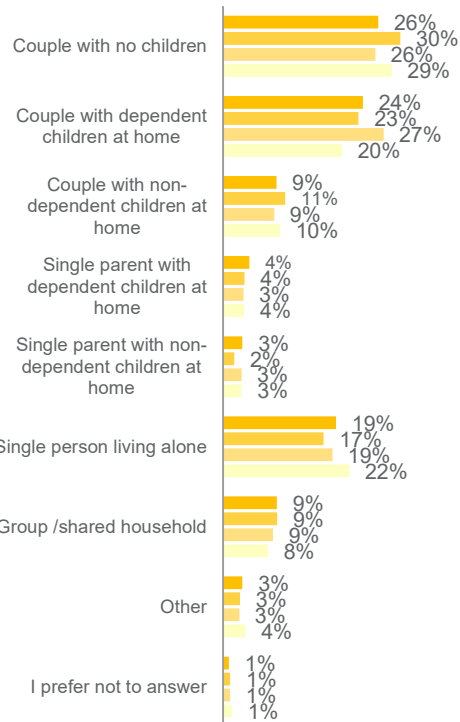
Age



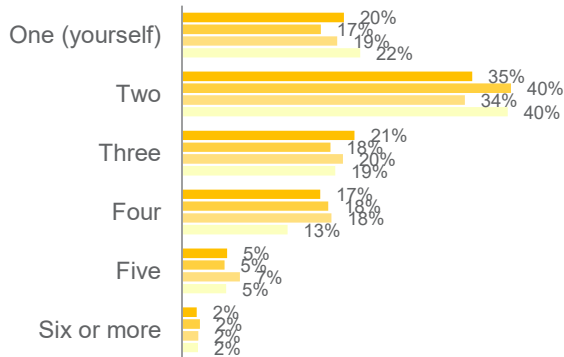
Gender



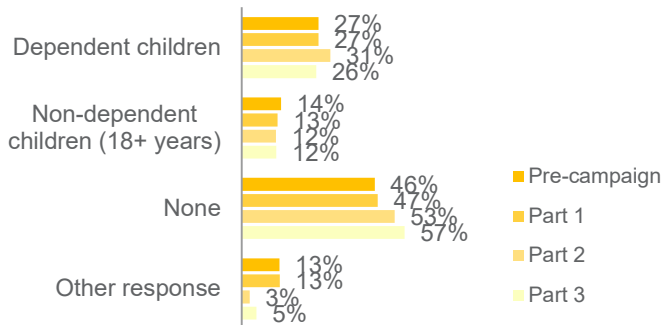
Household structure



People in household

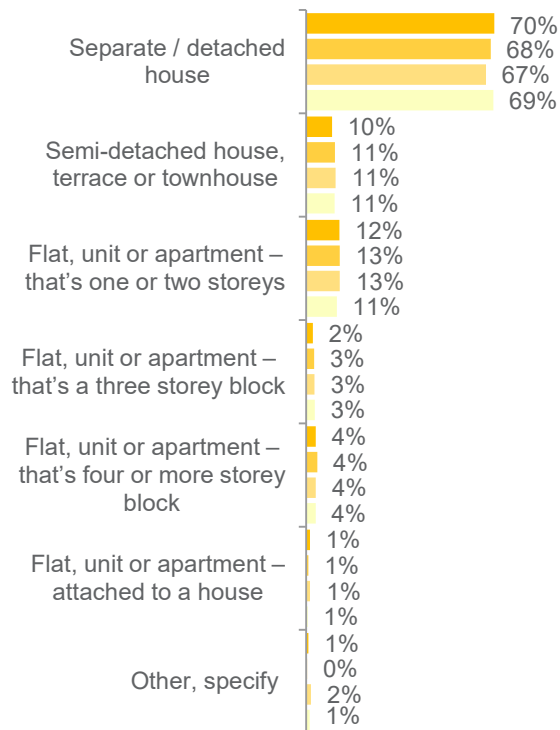


Children at home

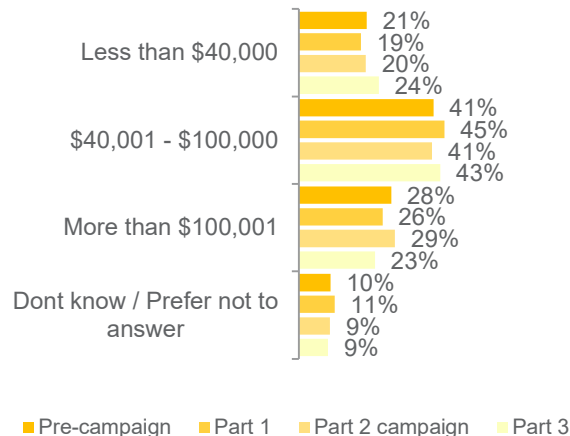


Demographics.

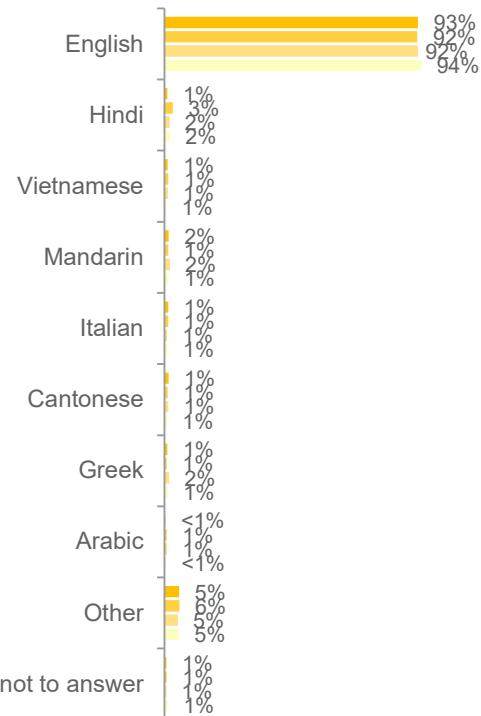
Property Type



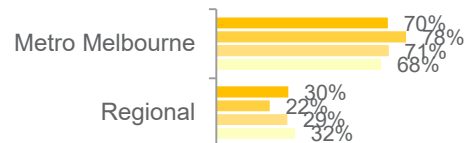
Household income



Main language



Location





Thanks.
Kantar Public.