



Get to know your recycling.

Final
Report for
Part 2
Survey

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Executive summary.

Since June 2018, Sustainability Victoria and Colmar Brunton have been measuring recycling understanding and behaviors among Victorians using an online tracking survey (n=1,000 each). Sustainability Victoria has launched a new communications campaign, 'Get To Know Your Recycling'. This report presents the findings of the post-campaign evaluation, along with historical data about recycling from our ongoing monitor.

Campaign findings

- ▶▶▶ Around half of Victorians recognised campaign elements in both Parts 1 and 2 (51% Part 1, 45% Part 2).
- ▶▶▶ The TVC is by far the most recognised element of the campaign, far greater than the figures for radio, online and outdoor combined.
- ▶▶▶ Three quarters of Victorians who saw the campaign took some form of action.
 - 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.

Current recycling knowledge and practice

- ▶▶▶ Five in ten Victorians have recycled something incorrectly in the last month – a rate of incorrect recycling that has remained stable in recent times. Incorrect recycling is particularly prevalent among men, younger Victorians, those who speak languages other than English at home and Multi-Unit Dwellers.
- ▶▶▶ The items that are most commonly recycled incorrectly are glass from broken windows, waxed cardboard boxes and plastic bags. It is possible that this is due to these items being similar in nature to items that can be recycled - for example, unwaxed cardboard containers, glass from food jars, etc.
- ▶▶▶ Seven in ten Victorians demonstrate at least some incorrect knowledge about what can and can't be recycled. Again, the items that cause the most confusion are waxed cardboard and broken glass from windows, etc.





Executive summary.

Current attitudes towards recycling

- 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 Victorians 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 Victorians 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.
- Some misconceptions about recycling persist in Victoria: two in ten believe that it is the recycling companies' responsibility to sort recycling. Further, the effects of the China ban may still be felt in the community, with two in ten Victorians continuing to perceive that recycling is not worth it as it ends up in landfill.
- Perhaps feeding these negative conceptions - Most Victorians do not profess a strong understanding of the Victorian recycling system. Only four in ten claim to have a good understanding.





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Background and methodology





Background.

- ▶▶▶ Since June 2018, Sustainability Victoria and Colmar Brunton have been measuring recycling behaviors, understanding and attitudes among Victorians.
- ▶▶▶ In May 2020, Sustainability Victoria launched a fully fledged marketing communications campaign, Get To Know Your Recycling. In support of this, Colmar Brunton is monitoring campaign performance with three waves of research - before, during and after the campaign.
- ▶▶▶ This report presents the findings of the third survey of the campaign evaluation, along with historical data about recycling from our ongoing monitor.
- ▶▶▶ A detailed timeline for the campaign timings and corresponding surveys is shown on the following page.

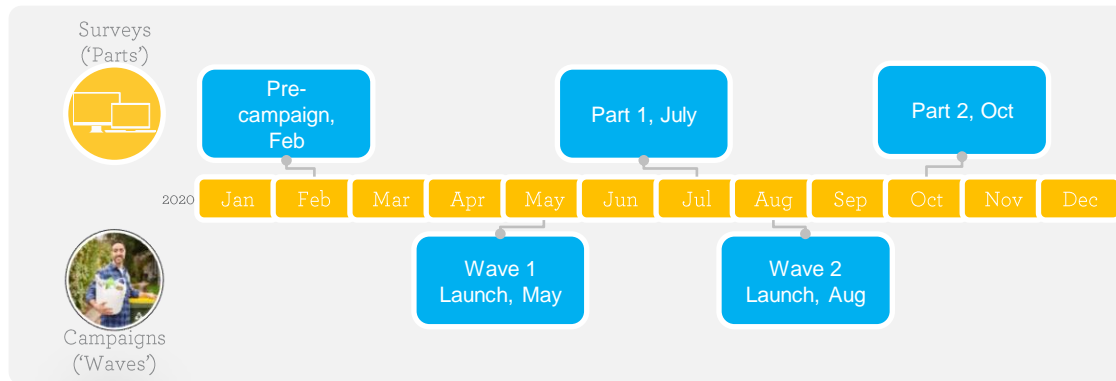




Survey and campaign timings.



- To date, there have been three surveys and two campaigns launched over the duration of this project.
- The surveys are referred to as: 'Pre-campaign Survey', Part 1 Survey' and 'Part 2 Survey' in this report.
- The two executions of the mass-media campaigns are referred to as 'Wave 1' and 'Wave 2'.
- The figure below shows the timings of the launch of these surveys and campaign waves.
- A third campaign wave is planned for early 2021 when a 'Post Campaign' survey will be run.



Methodology for the survey.

- Colmar Brunton designed an online survey which was administered to:
 - n=1,001 Victorians in May 2020
 - n=1,008 Victorians in July 2020
 - n=1,007 Victorians in October 2020
- The survey included measures about recycling behaviours and attitudes that were repeated from a survey conducted previously by Colmar Brunton for Sustainability Victoria.
- Specifically, the last three waves of the survey have been assessing the impact of the 'Get to Know Your Recycling' campaign.
- Three waves of the survey were conducted before the launch of the campaign (May), in the middle of the campaign (July), and after the campaign (October)
- 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 '20	Jul '20	Oct '20
Gender						
Male	466	502	500	48%	50%	50%
Female	547	503	505	52%	50%	50%
Age						
18 to 35	273	331	333	31%	33%	33%
36 to 55	372	335	332	34%	33%	33%
56+	368	342	342	35%	34%	34%
Location						
Metro	759	786	713	76%	78%	71%
Regional	254	222	294	24%	22%	29%

►► Sample Characteristics



Campaign findings.





➤ In Summary:

- Around half of Victorians recognised campaign elements in both Part 1 and Part 2 (51% Part 1, 45% Part 2).
- This slight decline in recognition may be due to a decreased spend in the latter parts of the campaign, and/or competition and saturation from other government campaigns relating to COVID-19.
- Regardless, a 45% recognition rate is still considered high and this minor decline since Part 1 is not considered a shortcoming of the campaign overall.
- The TVC is by far the most recognised element of the campaign, far greater than the figures for radio, online and outdoor combined.
- Three quarters of Victorians who saw the campaign took some form of action.
 - 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.
 - Council websites continue to be the most common source of information about recycling.
 - One third of participants indicated that they would go to www.recycling.vic.gov.au for recycling information (noting that they had been specifically prompted with the website in the survey – actual visitation of the website may be lower in a 'real-world' scenario).





Approximately five in ten Victorians claim to have seen the campaign in July 2020 – however, it is more likely that true recognition of the campaign is closer to four in ten.

➤ In Part 2, 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.



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

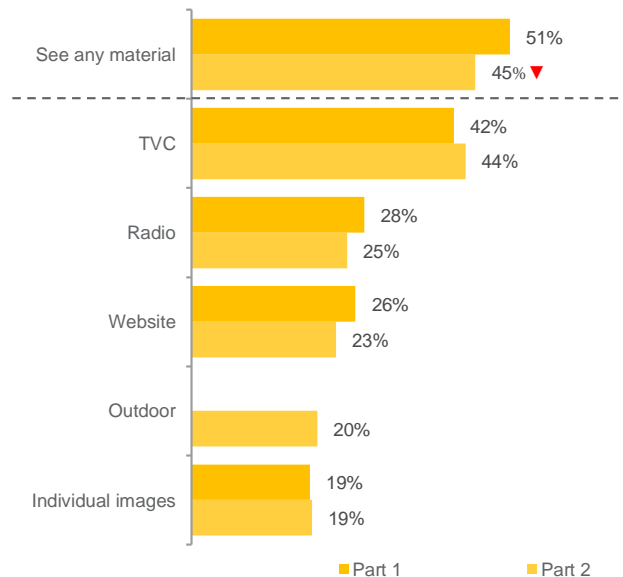
Base: All respondents, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007)

↑ ↓ indicates a significant difference between waves at 95% confidence.



Approximately five in ten Victorians claim to have seen the campaign in July 2020 – however, it is more likely that true recognition of the campaign is closer to four in ten.

- Overall, 45% of Victorians recalled at least one of these forms of advertising for Part 2 of the survey. This is a slightly lower rate of overall recall compared with the previous Wave of the survey.
- Awareness of specific collateral was highest for the TVC at just over four 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 Part 2.)
- No demographic differences were observed for the overall recognition measure ('seen any material') in Part 2 of the survey.
- Minor differences were seen by dwelling type and age (two closely related variables as discussed previously). Younger Victorians and those in 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, May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007)

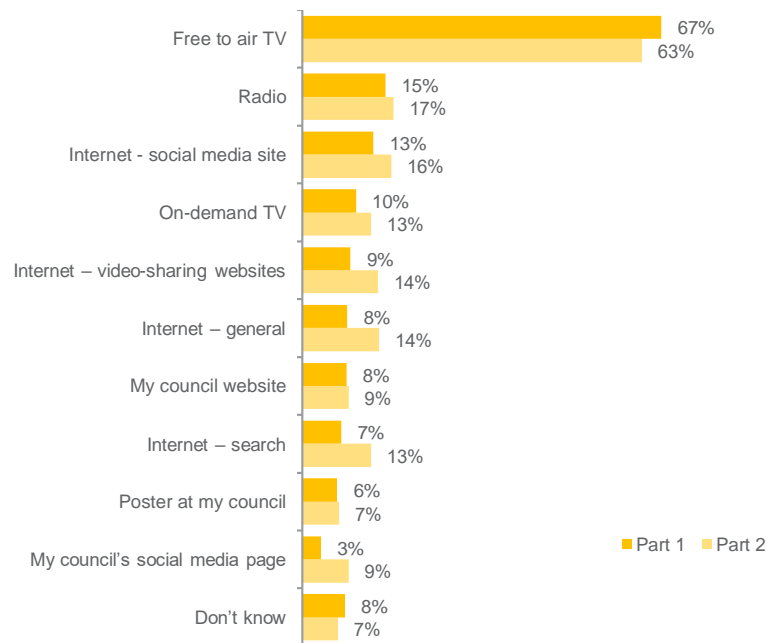
↑ ↓ indicates a significant difference between waves at 95% confidence.



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 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, October 2020 (n=455)

↑ ↓ indicates a significant difference between waves at 95% confidence.



Recalled media channels for the campaign by demography.

➤ In general terms:

- Men were less likely to recall the campaign on television, and more likely to recall seeing the collateral on the internet.
- The same was true for younger Victorians, who were also less likely to recall the TVC and more likely to recall online executions.
- 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=1,007)	Men (n=236)	Women (n=217)	18–44 (n=231)	44+ (n=244)	Metro (n=313)	Regional (n=411)
Free to air TV	63%	55% ▼	72% ▲	44% ▼	81% ▲	59% ▼	71% ▲
Radio	17%	18%	16%	19%	15%	16%	18%
Internet – social media site	16%	22% ▲	11% ▼	26% ▲	7% ▼	18%	14%
Internet – general	14%	18% ▲	10% ▼	21% ▲	8% ▼	15%	12%
Internet – video-sharing websites	14%	19% ▲	9% ▼	22% ▲	6% ▼	15%	12%

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

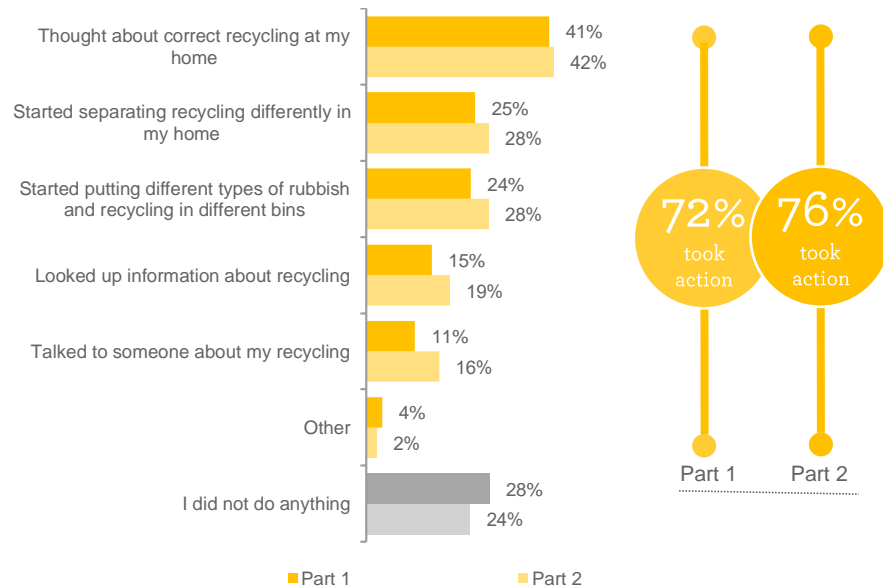
▲ ▼ indicates a significant difference between waves at 95% confidence.



Actions resulting from the campaign.

- Overall, 76% of those who recognised the campaign took some form of action.
- 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 waves 2 and 3.
- The proportions of Victorians taking any form of action were higher for:
 - Metro dwellers vs. regional (80% vs. 70%);
 - Younger Victorians vs. older (84% vs. 69%);
 - Those living in MUDs vs detached houses (85% vs. 72%); and
 - Renters vs. home-owners (83% vs. 73%).

Campaign action



Q39. As a result of seeing this campaign, what have you done? (MR)

Base: All campaign recognisers, October 2020 (n=455)

↑ ↓ indicates a significant difference between waves at 95% confidence.



Indication of media that was most effective in driving change.

- An analysis was undertaken to investigate which media channel was most effective at driving change in attitude or behaviour.
- Overall, it appears that Website and Out Of Home collateral were most effective. Those that saw the campaign via these channels were particularly likely to talk about recycling with someone, look up information on recycling and/or, start putting different types of rubbish in different bins
- However, these findings come with caveats and should be interpreted with caution.
 - The question about media recall was multiple response. Participants could have selected 'website' as well as 'TV'. Therefore, we cannot be certain that it was 'website' alone that drove the action. It may have been 'TV' or a combination of 'TV and website'.
 - There are possible interaction effects between age, media and action. 'Website' appears to be a more effective channel overall. However, young people were more likely to recall website material; *and* were also more likely to have taken action. Therefore, it is not clear if the effect is due to the media (website) or age (young people) or both.
 - Outdoor and website were recalled less frequently than TV. Therefore, it is possible 'net action' arising from these channels is actually smaller (i.e., the total amount of action may be larger for TV because more people saw it).

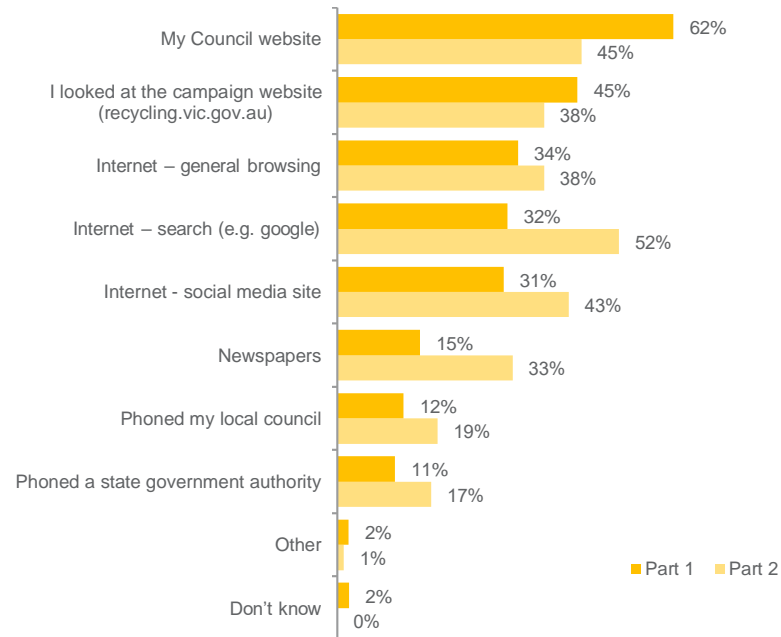




Information sources used after seeing the campaign .

- Council websites were the most common destination among the few Victorians who sought additional information, however referral onwards to a council website appears to have declined since Part 1.
- Four in ten 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 3% (n=33) of the total population who saw the campaign, sought further information, and went to www.recycling.vic.gov.au.
 - All of the 3% 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 waves should be interpreted with caution.

Source of additional information



Q40. Where did you look for more information? (MR)

Base: All campaign recognisers who took action, May 2020 (n=44), July 2020 (n=74), October 2020 (n=86).

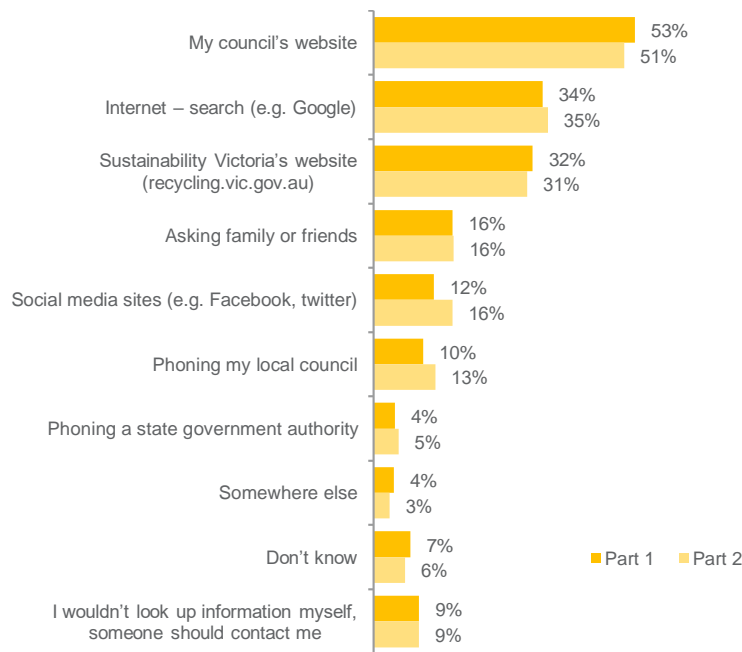
Note: As May 2020 base size is low (n<50), findings are indicative.



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.
- Once again, council websites were the most mentioned source of information, reinforcing the assumption that councils hold the knowledge required to manage recycling in the home.
- General Google searches were second 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.
- One third of participants indicated that they would go to www.recycling.vic.gov.au for recycling information (noting that they had been specifically prompted with the website in the survey – actual visitation of the website may be lower in a ‘real-world’ scenario).
 - Renters were more likely to indicate that they would go to this website compared with home-owners (36% vs. 28%).
- 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





Current recycling
knowledge and practice.





➔ In Summary:

- ➔ Two in ten Victorians have recycled something incorrectly in the last month – a rate of incorrect recycling that has remained stable in recent times.
- ➔ Incorrect recycling is particularly prevalent among men, younger Victorians, those who speak languages other than English at home and Multi-Unit Dwellers.
- ➔ The items that are most commonly recycled incorrectly are glass from broken windows, waxed cardboard boxes and plastic bags.
- ➔ It is possible that this is due to these items being similar in nature to items that can be recycled - for example, unwaxed cardboard containers, glass from food jars, etc.
- ➔ Seven in ten Victorians demonstrate at least some incorrect knowledge about what can and can't be recycled.
- ➔ Again, the items that cause the most confusion are waxed cardboard and broken glass from windows, etc.
- ➔ The impact of 'Getting to Know Your Recycling' on these measures of knowledge and practice is not clear.
- ➔ Those who saw the campaign demonstrated both worse knowledge of what can and can't be recycled, and recycling practice.
- ➔ However, it should not be concluded that the campaign reduced good recycling practice and knowledge. It is possible that those with poorer practices and knowledge were simply primed to take more notice of the campaign.





Current
recycling
practice.

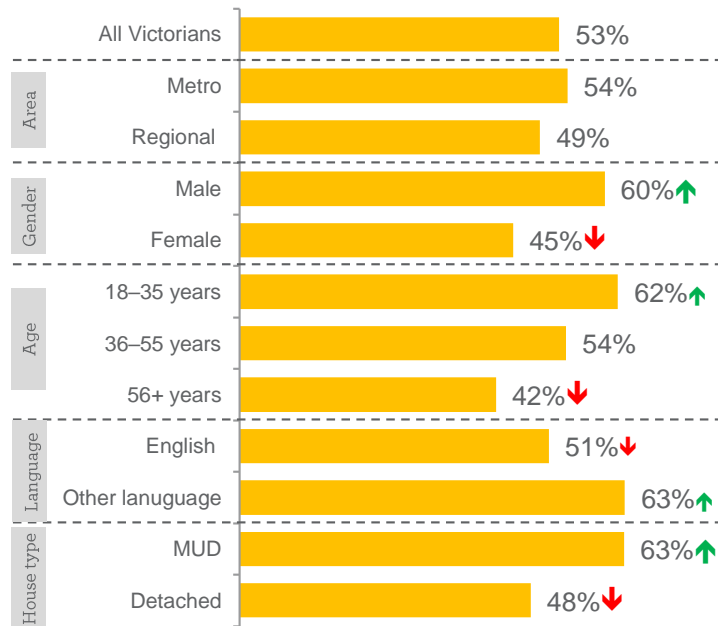




Rates of incorrect recycling practice.

- 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, half (53%) of Victorians have placed at least one incorrect item in their bin in the past month.
- The rates of incorrect recycling are higher for:
 - Men vs. women (60% vs. 45%);
 - Younger Victorians vs. older (62% vs. 42%);
 - People who speak other languages at home vs. English speakers (63% vs. 51%); and
 - Those living in Multi-Unit Dwellings (MUDs) vs. those in free-standing homes (63% vs. 48%).
- These findings are almost completely consistent with those from previous years of surveying – in previous years, a greater gap in practice was seen for metro and regional Victorians.

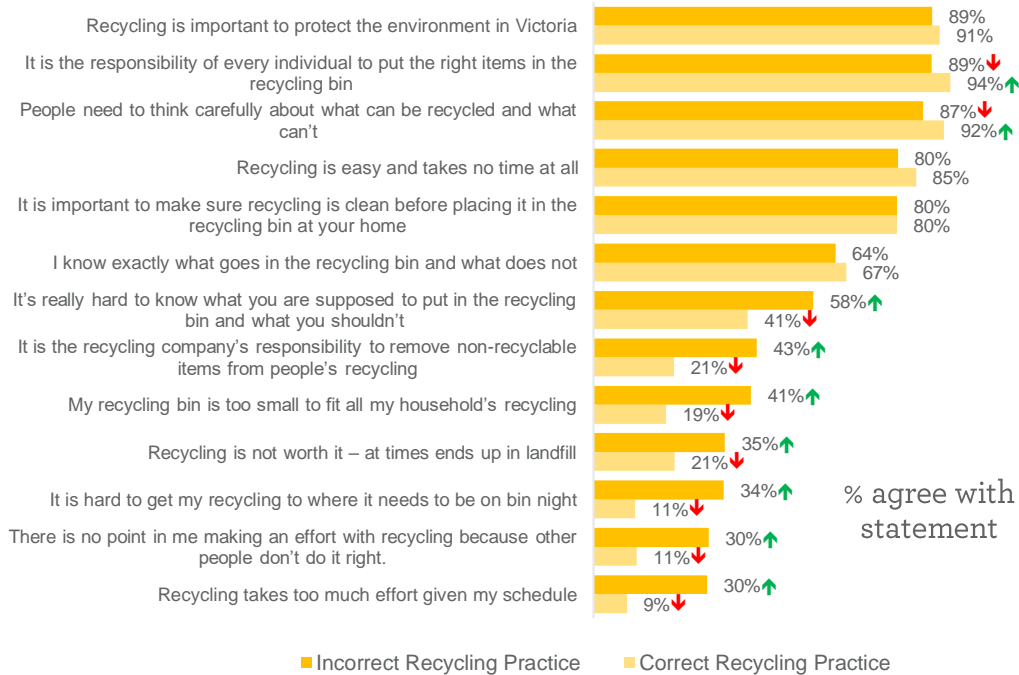
Rate of incorrect recycling





Incorrect recycling practice vs. recycling attitudes.

- Additional comparative analyses were run to compare rates of incorrect recycling practice against attitudes.
- 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:
 - Its 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)

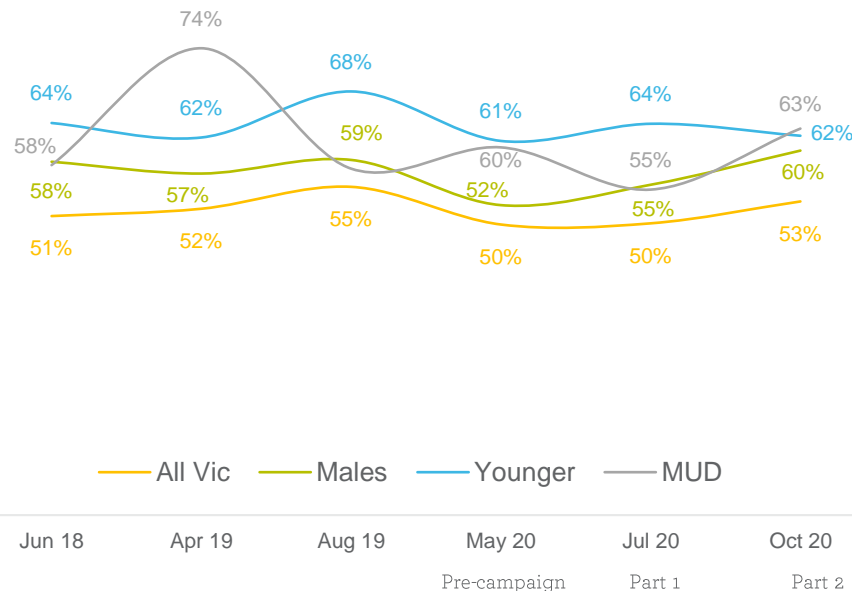
Base: All respondents, July 2020 (n=1,008) ↑ ↓ indicates a significant difference to all other groups at 95% confidence (e.g. metro vs. regional).



Rates of incorrect recycling practice over time.

- This measure of overall incorrect recycling practice has been assessed on a semi-regular basis since June 2018, in addition to the three waves of this campaign evaluation.
- The analyses have had a particular focus on populations that showed higher rates of incorrect recycling practice (CALD, MUD, younger, etc.).
- The rate of incorrect recycling has remained relatively stable for most populations at most time points.
 - The overall rate of incorrect recycling practice for all Victorians (orange bar) has remained relatively stable over time at between 50 and 55%.
 - The rate for males has typically been slightly higher, approaching 60%, and appears to be trending up (i.e. incorrect recycling is on the rise) since May 2020.
 - The rate for younger Victorians has been slightly higher again, though relatively stable since a peak of 68% in August 2019.
 - The rate of incorrect recycling for MUDs has shown the most substantial fluctuation with no consistent pattern of change observed.

Rate of incorrect recycling – Over time



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

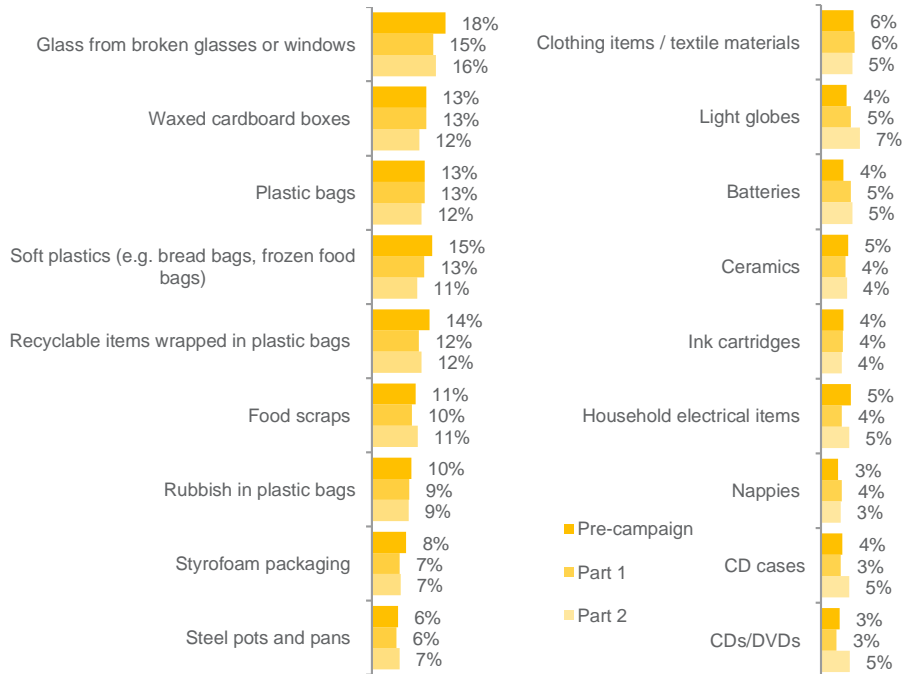
Note: in July 2020, Steel pots and pans and CD cases were reclassified as non-recyclables. Base: All respondents, June 2018 (n=1,021), April 2019 (n=1,470), August 2019 (n=1,013), May 2020 (n=1,001), July 2020 (n=1,008). ↑ ↓ indicates a significant difference to previous wave at 95% confidence.



Incorrect recycling of individual items for recycling.

- The items that are most commonly recycled incorrectly are glass from broken windows, waxed cardboard boxes and plastic bags.
- It is possible that this is due to these items being similar in nature to items that can be recycled - for example, unwaxed cardboard containers, glass from food jars, etc.
- The least common items that are mistakenly placed in the recycling bin are nappies and CDs/cases.
- This is likely because most households only dispose of nappies for a fixed and relatively short period of time (i.e. when young children are present). The proportion of this type of family who incorrectly dispose of nappies cannot be calculated from the data in this survey and may be worthy of follow-up.
- Further, the purchase and ownership of CDs is known to be on the decline given the availability of online streamed music, perhaps explaining the rarity of CD/case disposal.
- No change for these measures was observed over the three waves of the survey.

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)

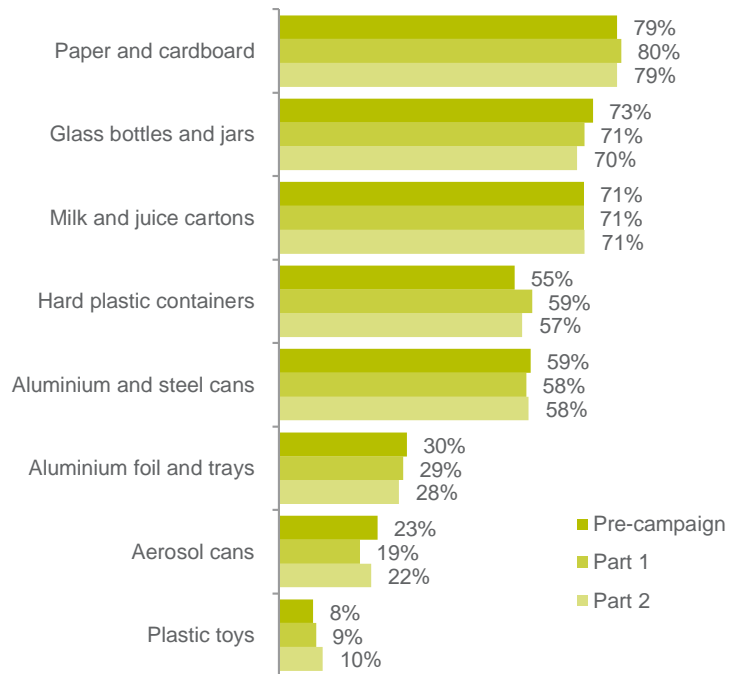
↑ ↓ indicates a significant difference between waves at 95% confidence.



Correct recycling of individual items for recycling.

- Most Victorians are correctly recycling the items that most commonly go in the recycling bin.
- For example, between seven and eight in ten Victorians are correctly recycling paper/cardboard, glass bottles/jars and milk/juice cartons.
- As noted on the previous page, there are many similarities between the recyclable items and non recyclable items. For example, the composition of a milk carton is similar to a waxed cardboard box; glass bottles and jars are structurally similar to broken glass from a window.
- No statistically significant differences were observed for the rates of correct recycling across the three waves of the survey.

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)

↑ ↓ indicates a significant difference between waves at 95% confidence.



Current
recycling
knowledge.

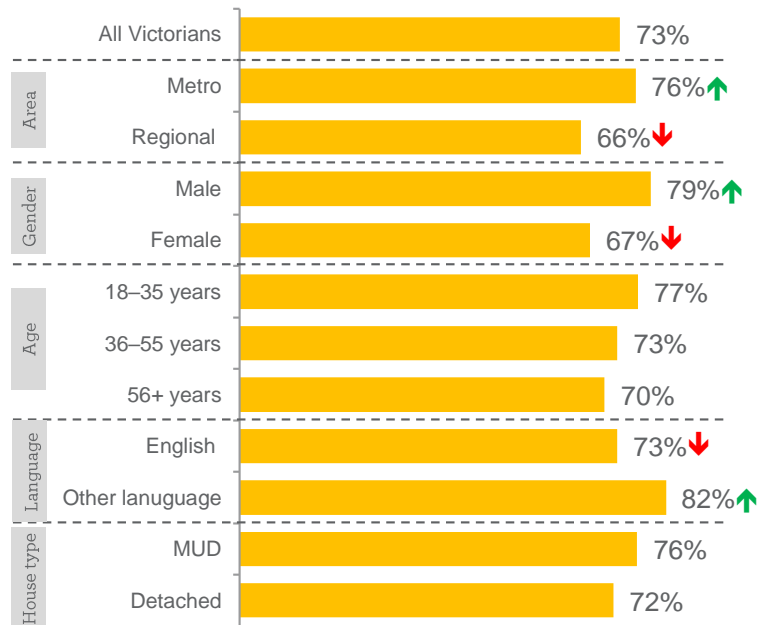




Rates of incorrect recycling knowledge.

- ▶▶▶ 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, 73% of Victorians incorrectly identified one or more items that they perceived were OK to put in the recycling bin.
- ▶▶▶ Rates of incorrect knowledge were higher for:
 - Those in metropolitan areas vs. regional dwellers (76% vs. 66%);
 - Men vs. women (79% vs. 67%); and
 - Victorians who spoke other languages at home vs. those who spoke English only (82% vs. 73%).
- ▶▶▶ Again, these findings are largely consistent with previous survey waves.

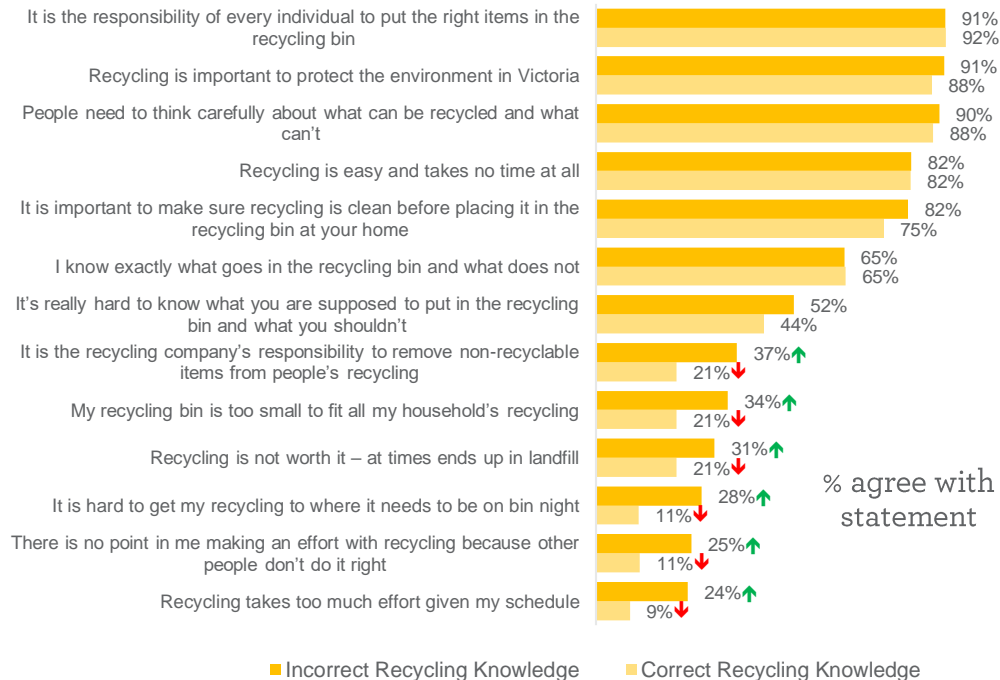
Incorrect recycling knowledge





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 23).
- Those who are unaware of correct recycling practices maintain the same indifferent attitudes as those exhibiting incorrect practices.
- 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 total at 95% confidence.

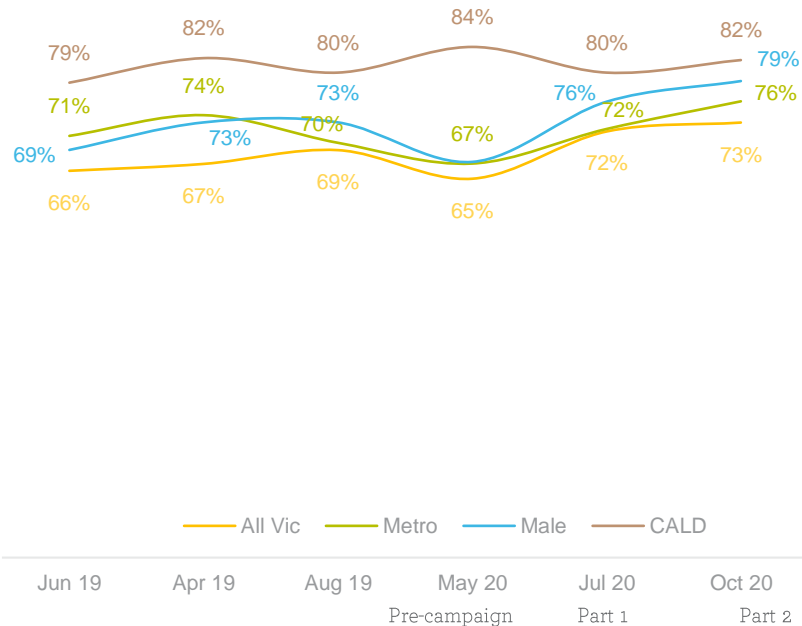


Rates of incorrect recycling knowledge over time.

➤ Overall, it seems that rates of incorrect recycling knowledge for all Victorians are going up (orange line).

- Over the total period of the survey, incorrect recycling knowledge has gone from a trough of 66% in June 2019 to a peak of 73% in October 2020.
- It is worth noting that the list of items that is contained in the survey has been changed over time as different items were considered in- and out-of-scope.
- It is also quite possible that Victorians are becoming increasingly confused about what can and cannot go in their recycling bins, having been exposed to different messaging from different organisations, and having different recycling requirements in different areas.
- Despite some minor fluctuation year-on-year, this general upward trend is also apparent for communities of interest such as Metropolitan dwellers, men and CALD households.

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)

↑ ↓ indicates a significant difference to previous wave at 95% confidence.



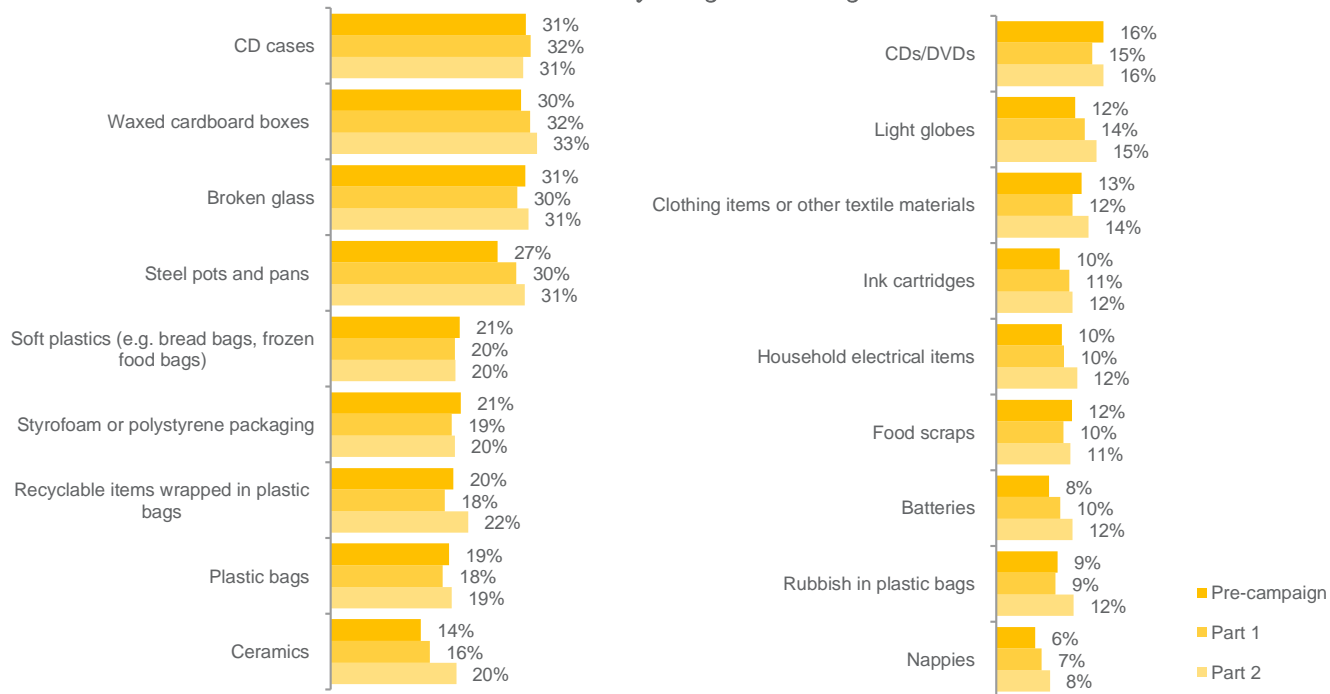
Incorrect knowledge of specific individual items for recycling.

Victorians most commonly perceive that CD cases, waxed cardboard boxes and broken glass (such as that from windows) can be recycled, even though these items cannot be recycled using current systems in the state.

Food scraps, batteries and rubbish in plastic bags are rarely recycled incorrectly.

There has been little change in the rates of incorrect recycling knowledge for individual items over the three waves 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)

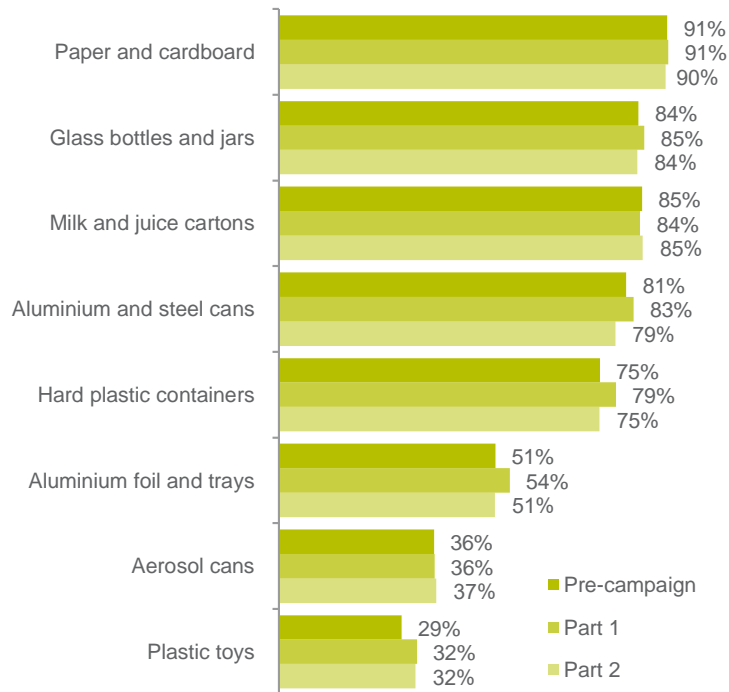
↑ ↓ indicates a significant difference between waves at 95% confidence.



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.
- As was the case for *incorrect* knowledge, there has been little change in the rates of *correct* recycling knowledge for the last three waves of the survey.

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)

↑ ↓ indicates a significant difference between waves at 95% confidence.



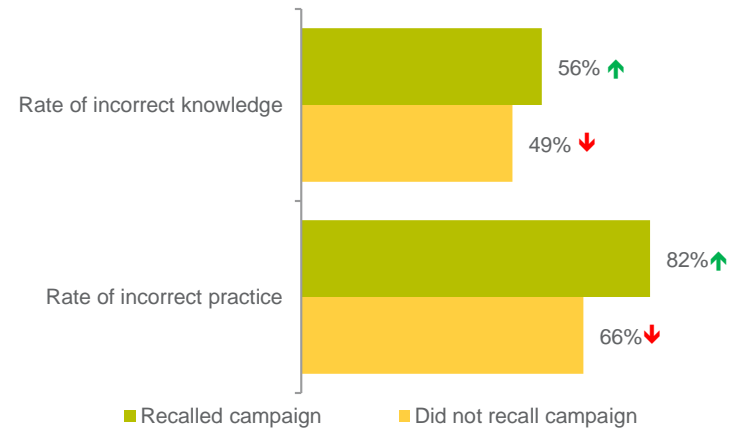
Knowledge and
practice in
relation to the
campaign.





Differences in knowledge and practice for those who did and did not see the campaign.

- The primary aim of this research is to evaluate the impact of the 'Get to know your recycling' campaign.
- The findings relating to impact based on these key measures of knowledge and practice should be interpreted with caution.
- The chart to the right shows rates of incorrect knowledge and practice for those who were and were not exposed to the campaign (based on recall).
 - Analysis shows that rates of incorrect knowledge are higher for those that recalled the campaign (i.e. knowledge was worse).
 - However, rates of incorrect practice were also higher for those that recalled the campaign (i.e. practice was worse).
- However, it should not be concluded that the campaign reduced good recycling practice and knowledge. It is possible that those with poorer practices and knowledge were simply primed to take more notice of the campaign.
- Discussion of more detailed and specific outcomes from the campaign are included at the end of this report.



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)

↑ ↓ indicates a significant difference between waves at 95% confidence.



Attitudes towards recycling





➔ In Summary:

- ➔ 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 Victorians 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 Victorians 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.
- ➔ Some misconceptions about recycling persist in Victoria: two in ten believe that it is the recycling companies' responsibility to sort recycling. Further, the effects of 'China Sword' may still be felt in the community, with two in ten Victorians continuing to perceive that recycling is not worth it as it ends up in landfill.
- ➔ Perhaps feeding these negative conceptions - Most Victorians do not profess a strong understanding of the Victorian recycling system. Only four in ten claim to have a good understanding.
- ➔ In summary – while Victorians are very positive about the concept and ideals of recycling, few profess to understand the system well, some hold negative misconceptions, and some lack the knowledge and resources to recycle effectively.





Common attitudes towards recycling.

Victorians hold very positive and constructive attitudes towards recycling both for themselves and for the community.

For example, most Victorians agree:

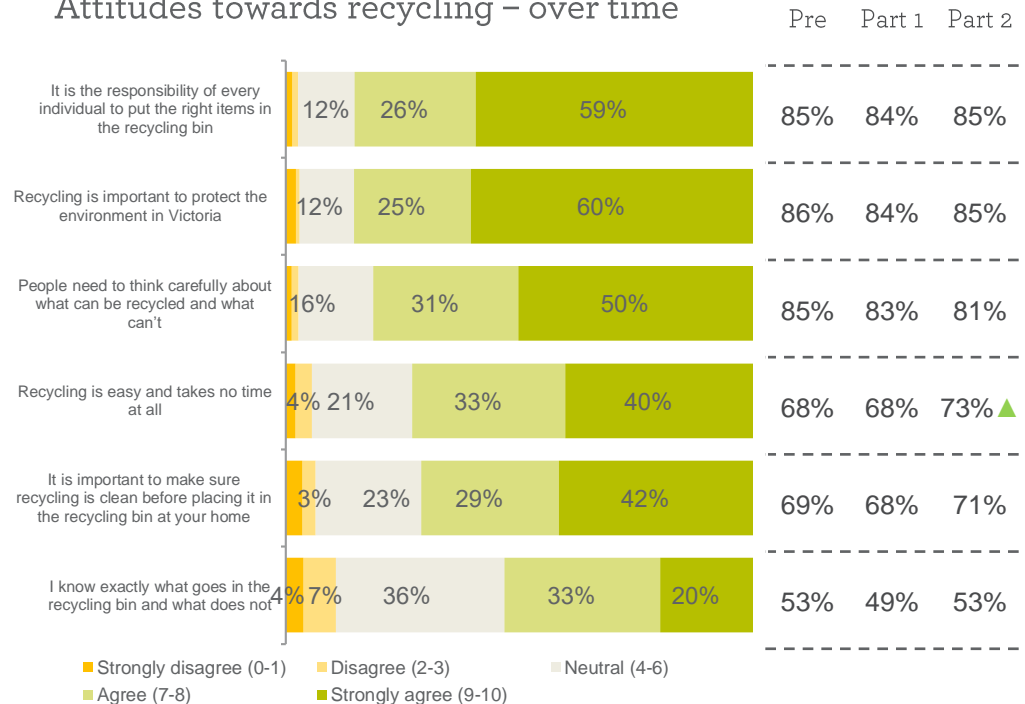
- It is the responsibility of all Victorians to put the right items in their recycling bins;
- Recycling is important to protect the environment in Victoria; and
- People need to think carefully about what can/can't be recycled.

Very few (less than 5% of Victorians) disagree with these statements.

There has been a significant increase in the proportion of Victorians who perceive that 'recycling is easy and takes no time at all' (68% agree to 73% agree).

No other significant shifts in attitude were observed over the last three waves of the survey.

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)

▲ ▼ indicates a significant difference between waves 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, 80% of Victorians aged 18-35 agree that 'it is the responsibility of every individual to put the right items in the recycling bin', compared with 91% of Victorians aged 56+.

	Gender			Age			Location		Language	
	Total (n=1,007)	Men (n=500)	Women (n=505)	18-35 (n=333)	36-55 (n=332)	56+ (n=342)	Metro (n=713)	Regional (n=294)	English only (n=931)	CALD (n=139)
It is the responsibility of every individual to put the right items in the recycling bin	85%	83%	87%	80% ▼	85%	91% ▲	84%	87%	86%	81%
Recycling is important to protect the environment in Victoria	85%	84%	87%	81%	86%	90%	85%	86%	85%	81%
People need to think carefully about what can be recycled and what can't	81%	80%	83%	75% ▼	80%	89% ▲	81%	82%	81%	78%
It is important to make sure recycling is clean before placing it in the recycling bin at your home	71%	68%	74%	68%	72%	73%	71%	72%	71%	68%
Recycling is easy and takes no time at all	73%	71%	75%	65% ▼	75%	79% ▲	72%	76%	74%	63%
I know exactly what goes in the recycling bin and what does not	53%	55%	51%	47%	55%	57%	52%	55%	53%	53%

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

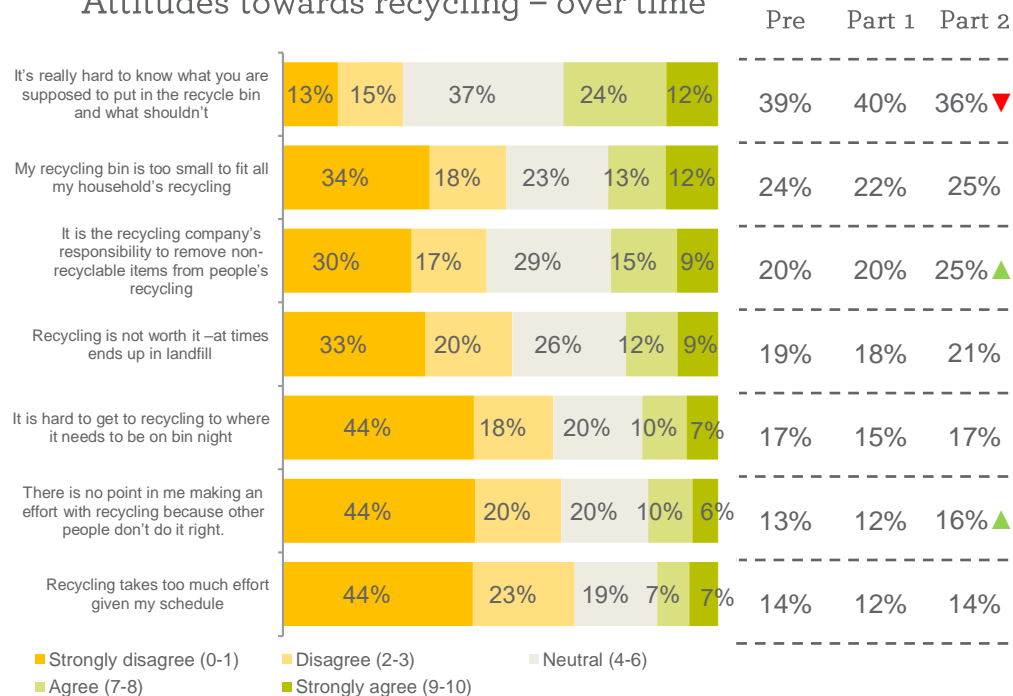
▲ ▼ indicates a significant difference between all other sub-groups at 95% confidence, e.g. males vs. females.



Less common attitudes towards recycling.

- Victorians also expressed some more negative attitudes towards recycling, though the overall tone remains positive.
- For example, one third of Victorians perceive that it is 'really hard to know what is supposed to go in the recycle bin'.
- From a logistical perspective, one quarter perceive that their bin is too small (these respondents may not be aware that larger bins may be available or may be unwilling to pay for them).
- 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.
- Encouragingly, the proportion of Victorians who perceive that 'it is hard to know what goes in the recycling bin' has declined in the third Wave of the survey.
- However, the perceptions that it is the recycling companies' responsibility to sort items', and that 'there is no point recycling properly because others do not do it right', have increased in this third Wave.

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)

▲ ▼ indicates a significant difference between waves 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:

- Men tended to have more negative attitudes than women (for example, a more prevalent perception that recycling ends up in landfill),
- 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=1,007)	Men (n=500)	Women (n=505)	18–35 (n=333)	36–55 (n=332)	56+ (n=342)	Metro (n=713)	Regional (n=294)	English only (n=931)	CALD (n=139)
It's really hard to know what you are supposed to put in the recycle bin and what you shouldn't	36%	39%	32%	41%	39%	27% ▼	36%	35%	35%	39%
My recycling bin is too small to fit all my household's recycling	25%	29% ▲	21% ▼	37% ▲	29%	10% ▼	26%	22%	24%	27%
Recycling is not worth it –at times ends up in landfill	21%	27% ▲	16% ▼	21%	26%	17%	20%	23%	21%	21%
It is the recycling company's responsibility to remove non-recyclable items from people's recycling	25%	32% ▲	17% ▼	31% ▲	28%	15% ▼	26%	22%	24%	27%
It is hard to get the recycling to where it needs to be on bin night	17%	22% ▲	12% ▼	26% ▲	21% ▲	5% ▼	19%	15%	16% ▼	25% ▲
There is no point in me making an effort with recycling because other people don't do it right.	16%	22% ▲	10% ▼	22% ▲	20%	7% ▼	18%	13%	15%	20%
Recycling takes too much effort given my schedule	14%	19% ▲	9% ▼	19% ▲	19% ▲	4% ▼	15%	12%	14%	17%

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

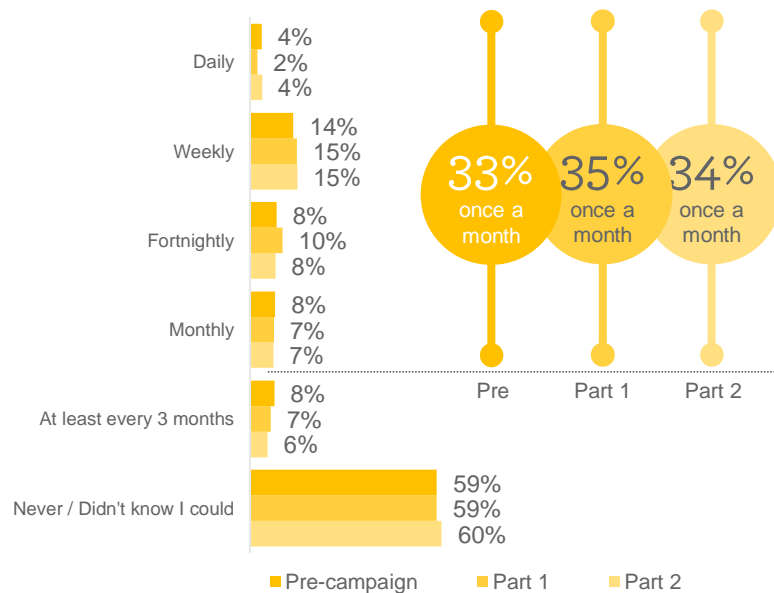
▲ ▼ indicates a significant difference between all other sub-groups at 95% confidence, e.g. males vs. females.



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

- Victoria offers soft plastic recycling drop-off points outside of people's homes at places such as supermarkets.
- Overall, around one third of Victorians use these soft plastic disposal facilities monthly or more often.
- Specifically for Part 2 of the survey 4% use these facilities daily, 15% weekly, 8% fortnightly and 7% monthly.
- Usage of soft plastic deposit bins is more common among:
 - Younger Victorians (43% monthly +) compared with older Victorians (24); and
 - Those living in MUDs (45%) compared with those in detached homes (29%).
- It is possible that there is some interaction between the two differences described above in that younger people more commonly live in MUDs.
- There has been little change in the usage of soft plastic recycling bins over the last three waves of the survey.

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)

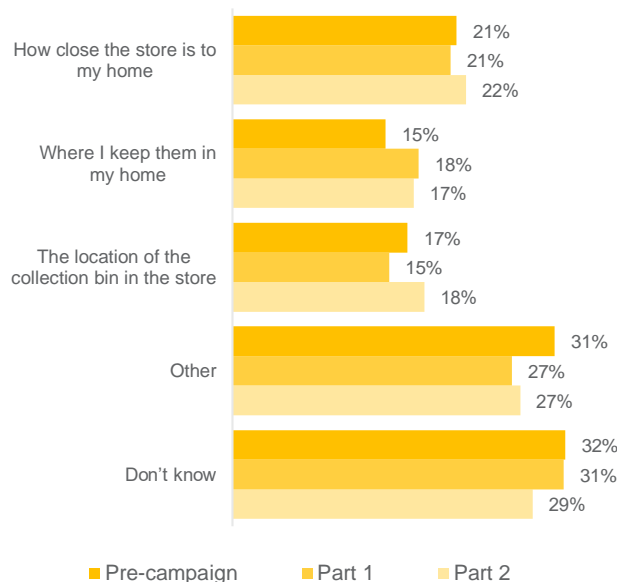
Base: All respondents May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007)



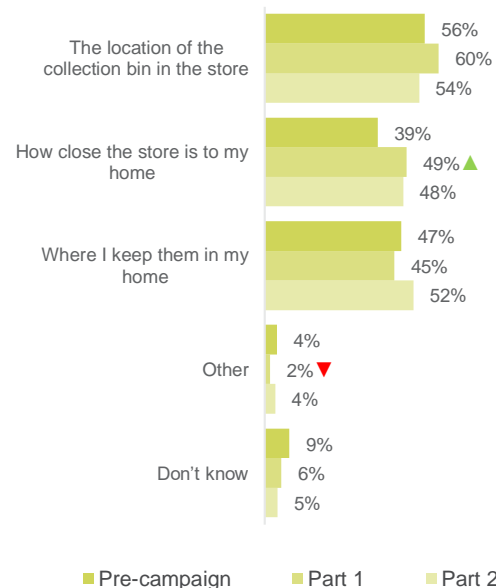
Barriers and enablers of out-of-home soft plastic recycling bins.

- Victorians who used soft plastic disposal bins were asked what made it hard or easy to use these facilities.
- 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 waves 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



Enablers of soft plastic deposit



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).

▲ ▼ indicates a significant difference between waves 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, a perception that soft plastics cannot be recycled at all 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.

We use them for the garbage

Remembering to take them with me

Store not collecting at the moment

I reuse them at home as bin liners or for food scraps

It's far more convenient to put them in the rubbish bin

Never think to consider this option

I have not seen a bin for soft plastics in my supermarket

Soft plastics aren't recyclable here

Did not know they did this. My supermarket does not have any signs or bins around to do this at all

COVID 19 restrictions

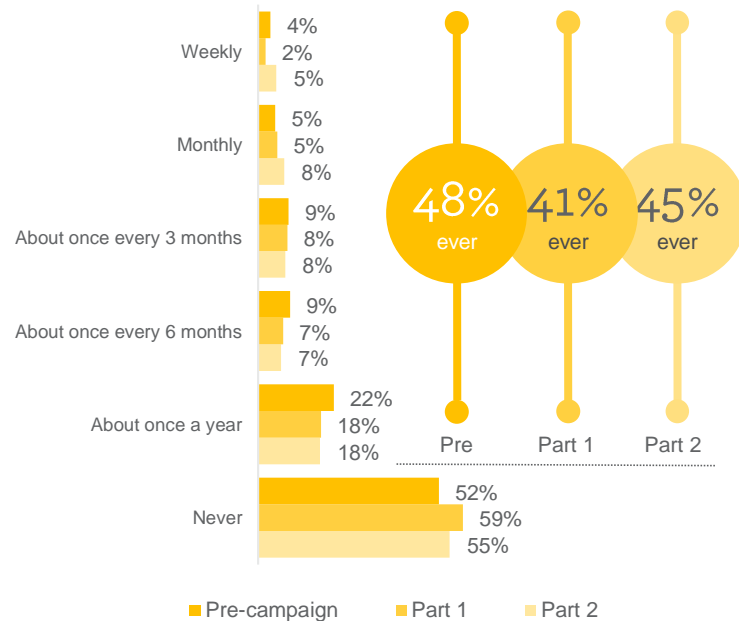
COVID isolation



Usage of council websites to source information about recycling.

- Overall, between four and five in ten Victorians had ever sought information about recycling from a council website.
- Specifically for Part 2, 5% use council websites weekly, 8% monthly, 8% 3-monthly, 7% 6-monthly and 18% yearly.
- Like other measures, usage of council websites tends to vary by age, gender and house type. For example:
 - Men were more likely to have used council websites compared with women (50% of men ever used them, compared with 40% of women);
 - Younger Victorians were more likely to have used council websites compared with older Victorians (51% vs. 49%); and
 - Those living in MUDS were more likely to have used a council website compared with those in detached homes (53% vs. 42%).
- Usage of council websites to attain information about recycling has not changed significantly over the three waves of the survey.

Frequency of researching local council recycling information

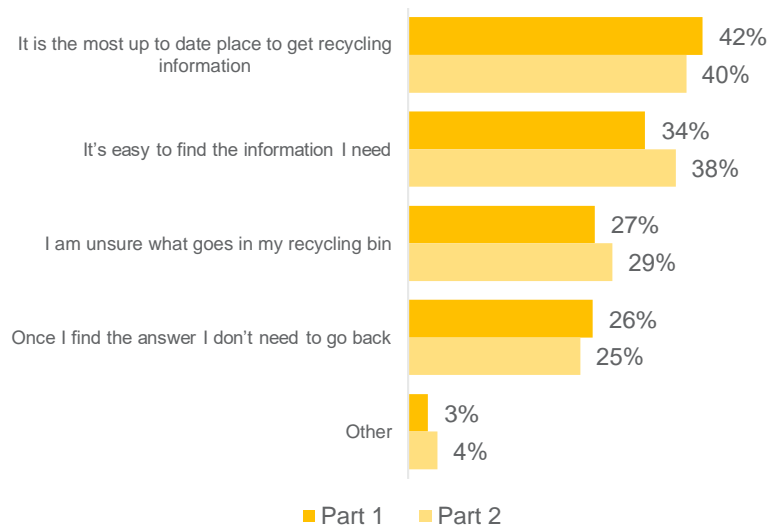




Reasons for usage of council websites.

- 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 waves of the survey.

Reasons for using council websites for recycling information

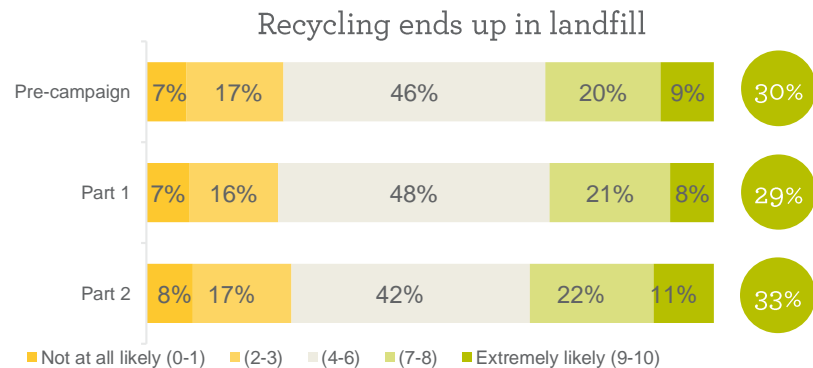
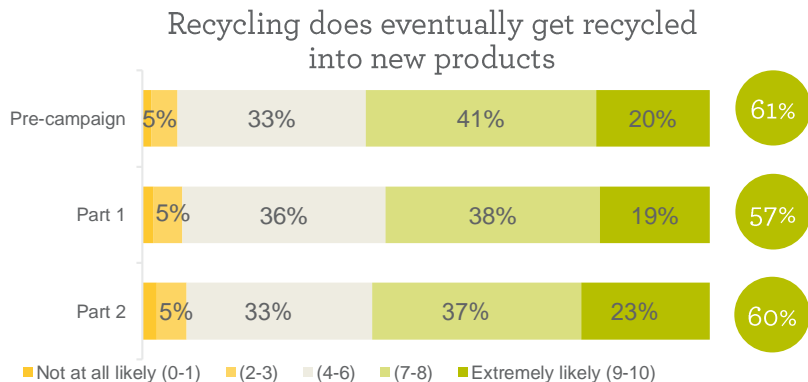




Perceptions of recycling outcomes.

- 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

- Far fewer Victorians perceive that recycling ends up in landfill. Only three in ten think this scenario is likely. A further three in ten 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 (35% vs. 25%)



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)

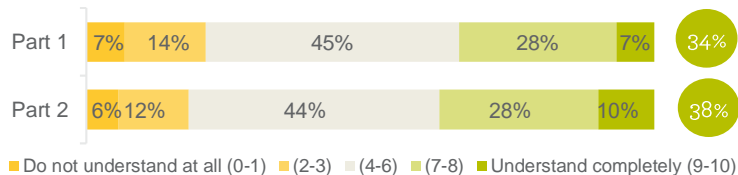
Base: All respondents May 2020 (n=1,001), July 2020 (n=1,008), October 2020 (n=1,007)



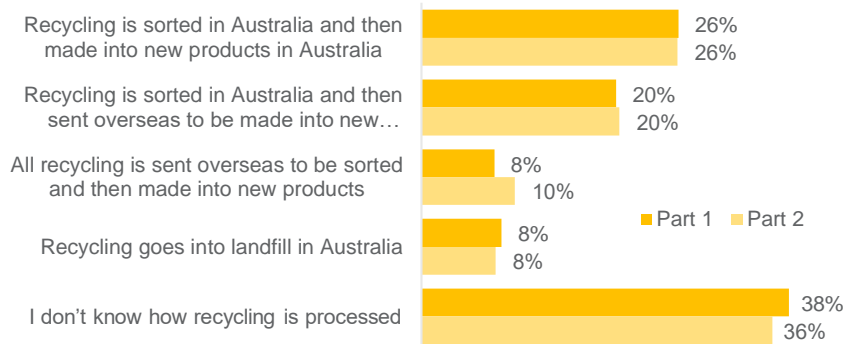
Levels of understanding of Victoria's recycling system.

- 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 2, similar to Part 1 (the question was not asked pre-campaign).
- No 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.
 - One quarter perceived that 'recycling is sorted in Australia and then made into new products in Australia';
 - One fifth perceived that 'recycling is sorted in Australia and then sent overseas to be made into new products';
 - One tenth perceived that 'all recycling is sent overseas to be sorted and then made into new products' or that 'recycling goes to landfill'.
 - The remaining one third of Victorians simply stated that they did not know, even after prompting.
- Those in regional areas were more likely to report 'don't know' for this measure (43% vs. 33% metro). Likewise, females were more likely to report 'don't know' (41% vs. 31% males). Older Victorians were also more likely to indicate 'don't know' than younger Victorians (41% vs. 31%).

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)

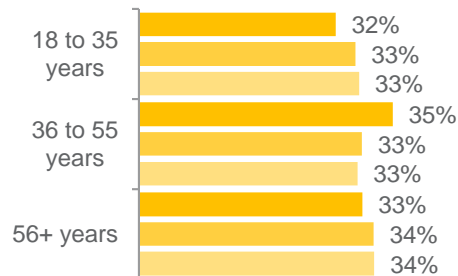


Appendices

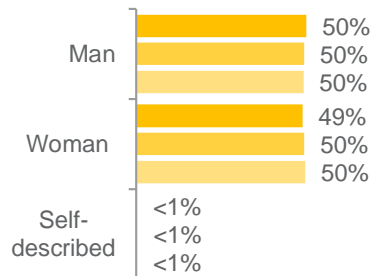


Demographics.

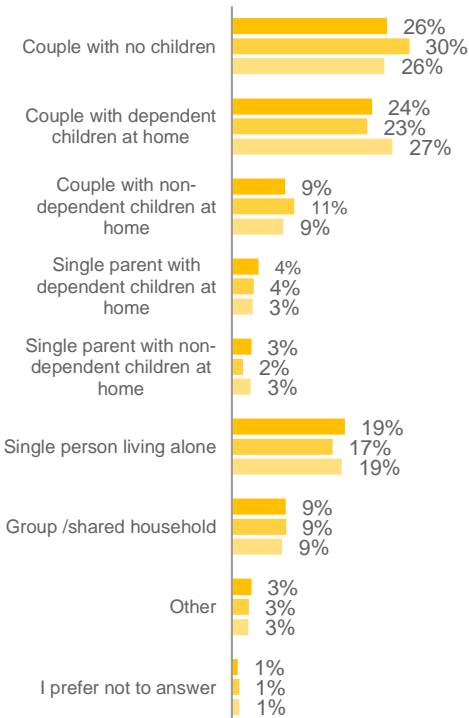
Age



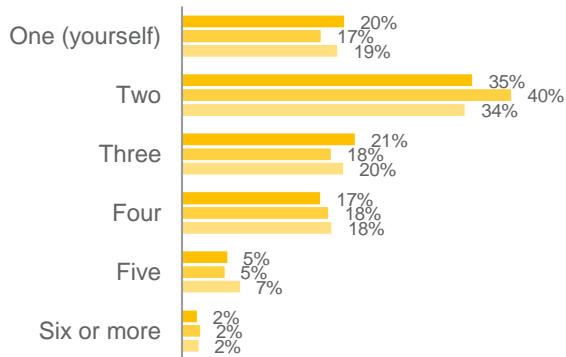
Gender



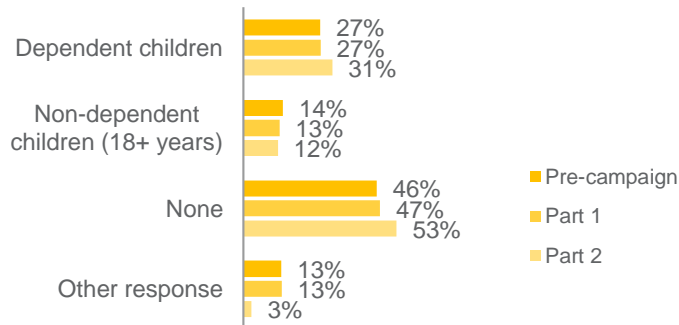
Household structure



People in household

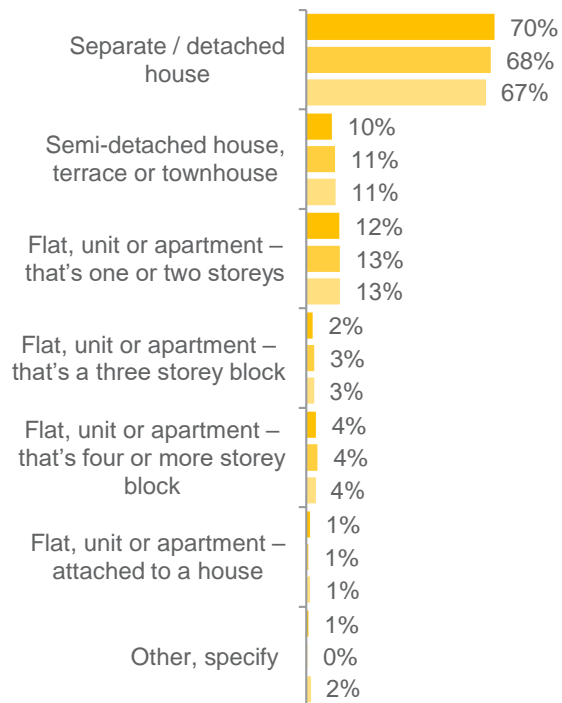


Children at home

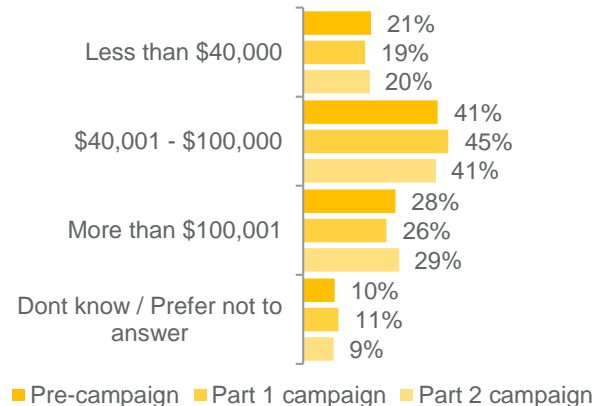


Demographics.

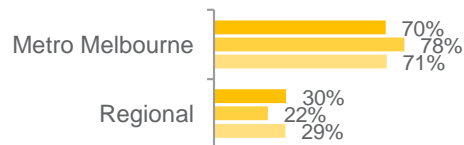
Property Type



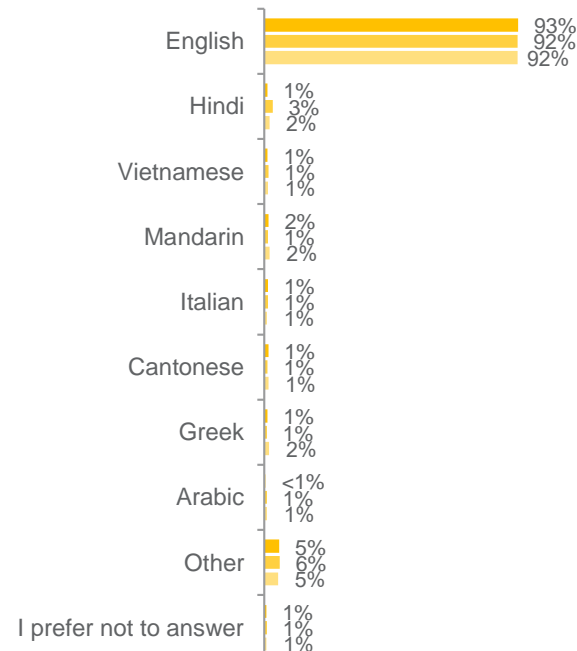
Household income



Location



Main language





Thanks.
Colmar Brunton.

