

ACOR Public Opinion Research

REPORT April 2018

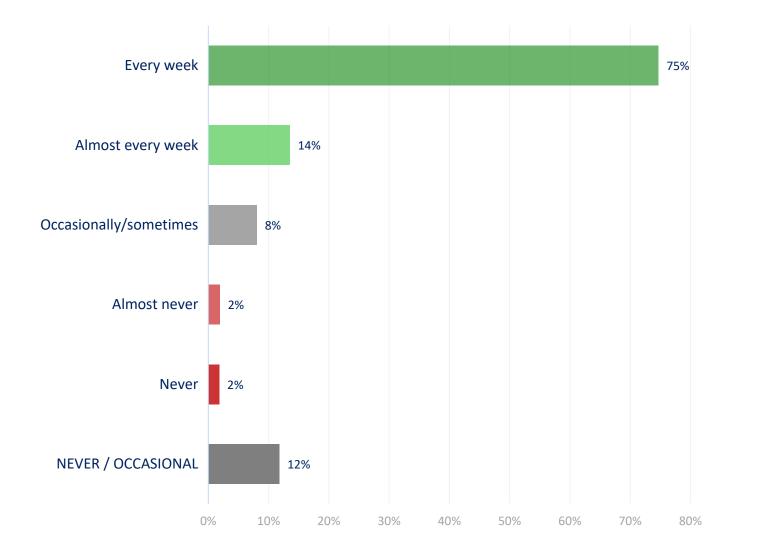
Summary Methodology



This research was undertaken to understand the opinions and behaviours of Australian voters regarding recycling, and what messages will lead to greater support for the recycling industry

- 2 x qualitative focus groups were held in Western Sydney among voters on 9th April 2018
 - People working in marketing, politics and the media were excluded from the groups
 - As were people working in the recycling industry
- Quantitative research (16th–18th April 2018):
 - Online survey of n=1,000 randomly selected Australian adult residents (also voters)
 - Excluded residents whose councils do not offer recycling services
 - Results accurate to +/-3.1% margin of error (at the 95% confidence interval)
 - Greater margins of error on smaller sub-samples
 - Minimum quotas and data weighting on area, sex and age to ensure accurate representation
 - Data broken down by recycling behaviours, region and/or voting intention where appropriate

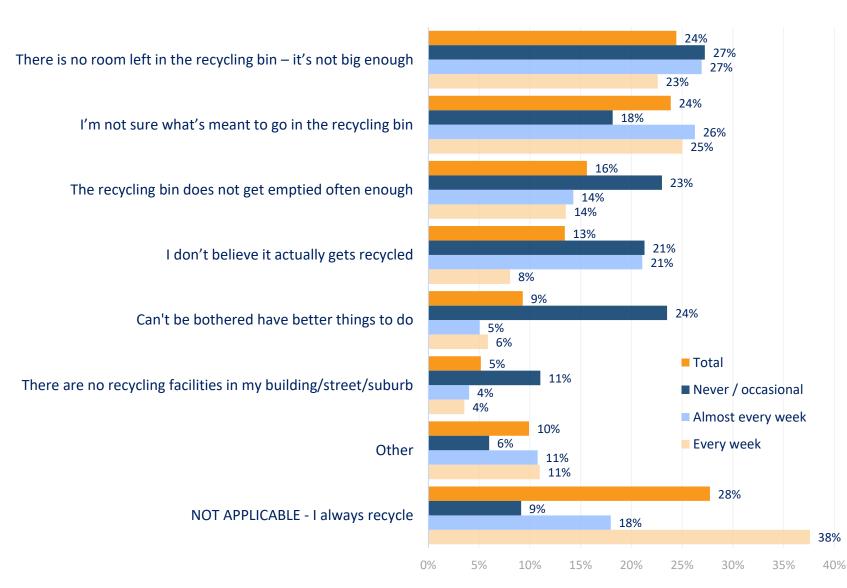
Recycling behaviour





- Three quarters (75%) of Australians say that they separate recyclable material into a dedicated recycling bin 'every week' when putting their household garbage out for collection.
- A further 14% say that they recycle 'almost every week'
- 8% said they occasionally/ sometimes recycle
- Only 4% said that they 'never' or 'almost never' recycle.

Prompted reasons for not recycling - Habits





- The most commonly agreed with reasons not to recycle are that bins aren't big enough and there is confusion about what can be accepted.
- Those who recycle every week are significantly less likely to say they can't be bothered or that they don't believe it actually gets recycled.
- Those who never or only occasionally recycle are significantly more likely to say they can't be bothered or that they don't believe it actually gets recycled – or to mention a lack of recycling facilities in their building, street or suburb.

And to the extent that your household doesn't (or doesn't always) recycle, what are the reasons your household doesn't recycle? NB: Multiple responses permitted. Base: Those who don't always recycle n=486

Support for Measures

National plan to improve recycling & make our economy based more on re-using rather than throwing out (+88) Govt needing to consider recycled materials first when buying materials for projects (+84) Making it compulsory for packaged products in Australia to be affordably recyclable (+83) National education helping people be clear on kerbside (+81) Compulsory for recycled content to be used in all packaging (+81) Renegotiating council / recycling firms' contracts to reduce risk of losing services (+81) The introduction of recycling-related "star" ratings on packaging and products (+76) One-off injection of public money for equipment to sort and make more products (+65) In states with waste levies* spend more on improving recycling from the \$1bn+ they currently collect (+61) Extra levy or environment tax for importers to help fund recycling of their products (+60) Make companies pay the cost of recycling their products & packaging (+56) A user-pays approach to waste & recycling where you pay less if you reduce rubbish and improve recycling quality (+48) Introduce a waste disposal levy on council rates in this state (like in other states) to help recycling** (+12) Increased council rates (e.g. up to \$50/yr) to fund more sustainable 14% recycling and ensure services continue (-9) 0%





- Voters are highly supportive of governments acting to support recycling including "a national plan...".
- Measures forcing government and industry to be better with recycling are also supported, including "Consider recycled materials first when buying materials for projects" (89% support), and "Making it compulsory for packaged products in Australia to be affordably recyclable" (88%).
- Measures that hit the hip pocket, are less supported, especially increased council rates

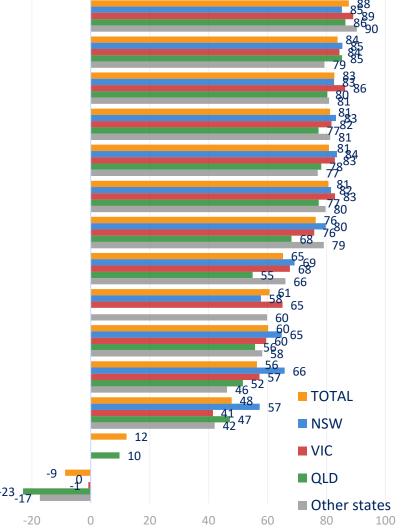
Strongly support Somewhat support Don't know TOTAL OPPOSE

Several ideas have been put forward of things that governments in Australia could do to create a more viable and sustainable recycling sector in Australia. To what extent would you support or oppose governments in Australia introducing of each of these measures? * Asked in NSW, VIC, WA, SA and ACT ** Asked in QLD, TAS and NT only

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Net Support for measures – State

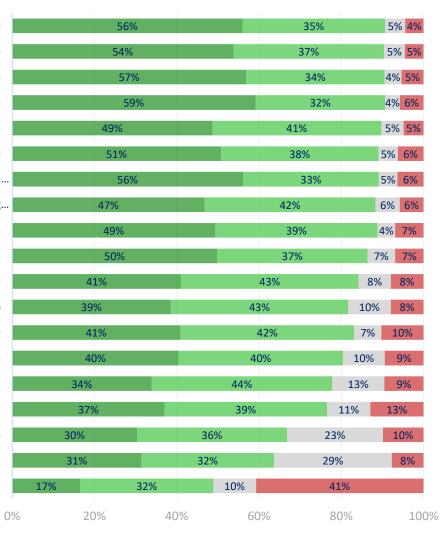
National plan to improve recycling & make our economy based more on reusing rather than throwing out Govt needing to consider recycled materials first when buying materials for projects Making it compulsory for packaged products in Australia to be affordably recvclable National education helping people be clear on kerbside Compulsory for recycled content to be used in all packaging Renegotiating council / recycling firms' contracts to reduce risk of losing services The introduction of recycling-related "star" ratings on packaging and products One-off injection of public money for equipment to sort and make more products In states with waste levies* spend more on improving recycling from the \$1bn+ they currently collect Extra levy or environment tax for importers to help fund recycling of their products Make companies pay the cost of recycling their products & packaging A user-pays approach to waste & recycling where you pay less if you reduce rubbish and improve recycling quality Introduce a waste disposal levy on council rates in this state (like in other states) to help recycling** Increased council rates (e.g. up to \$50/yr) to fund more sustainable recycling and ensure services continue -40





Several ideas have been put forward of things that governments in Australia could do to create a more viable and sustainable recycling sector in Australia. To what extent would you support or oppose governments in Australia introducing of each of these measures? * Asked in NSW, VIC, WA, SA and ACT ** Asked in QLD, TAS and NT only

Credibility of Messages Supporting Recycling Regulation



We need to stop seeing it as rubbish and start using it as a resource (+86) Brands should be putting recyclable materials in their packaging (+86) This is a national problem and we need to respond to it accordingly (+85) Fed govt. needs to support recycling to show its commitment to the environment (+85) To support industry to innovate in making products from recycled materials (+85) We need to create demand for recyclable materials here in Australia (+83) Councils have an obligation to ensure that recyclable materials don't go into landfill... It helps meet the promise that when I put out material it gets made into something... It would encourage and help Australians do the right thing for our environment (+82) We should use our recyclable materials here in Australia not ship them overseas (+79) It would create permanent jobs for lower skilled workers (+76) It would create jobs in regional towns of Australia (+74) We should be supporting more recycling even if it isn't profitable (+73) Without action, recycling in Australia is at risk of coming to an end (+71) It would boost our domestic economy (+68) We haven't really recycled until the waste is made into new products (+64) Recycled materials can cost less to produce than virgin materials (+57) Countries in Europe strongly support ... recycling and get better results (+56) Local governments could put up their rates if there's no other support for recycling (+8)

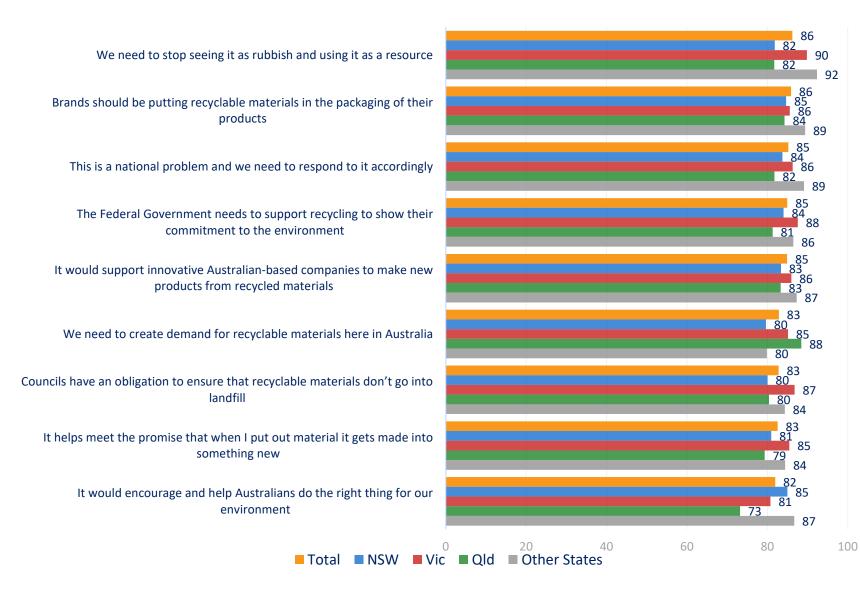
Strongly agree Somewhat agree Don't know TOTAL DISAGREE

Here are some things other people have told us are <u>good reasons</u> for governments in Australia to act to create a more sustainable recycling industry. To what extent do you agree or disagree these are good reasons for more government action in relation to recycling?



- The top reasons for supporting government action on recycling include 'We need to stop seeing it as rubbish and start using it as a resource' (+86% net agreement); 'This is a national problem and we need to respond to it accordingly' (+85%); 'The Federal Government needs to support recycling to show its commitment to the environment' (+85%).
- Additional reasons for supporting government action on recycling include 'We need to create demand for recyclable materials here in Australia' (+83%); and 'Councils have an obligation to ensure that recyclable materials don't go into landfill' (+83%).

Net credibility of messages – State (1/2)

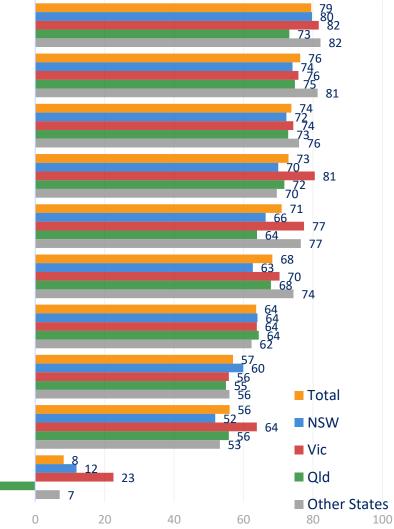




Here are some things other people have told us are <u>good reasons</u> for governments in Australia to act to create a more sustainable recycling industry. To what extent do you agree or disagree these are good reasons for more government action in relation to recycling?

Net credibility of messages – State (2/2)

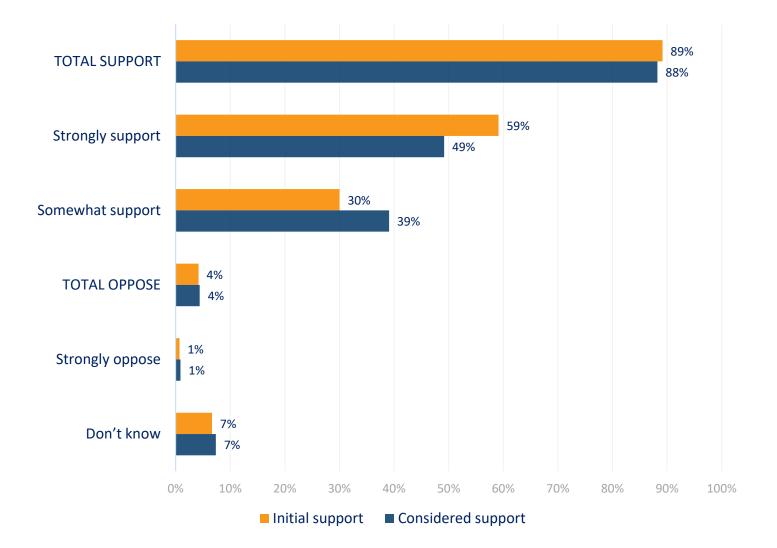






Here are some things other people have told us are <u>good reasons</u> for governments in Australia to act to create a more sustainable recycling industry. To what extent do you agree or disagree these are good reasons for more government action in relation to recycling?

Considered Support





 Total support eroded only 1% after the arguments for and against due to apprehension of higher council rates, given the high cost of living concerns on the spontaneous issue agenda.

From what you know or have read, seen or heard about the recycling sector in Australia, do you support or oppose Governments taking more action to create a sustainable recycling industry? Q18) Sometimes people change their minds on a subject after they have learned more about it. Having read some arguments for and against, to what extent do you now support or oppose Governments taking action to create a more viable and sustainable recycling industry?

Propensity for activism

I would sign a paper petition, or put my name to an online petition, to support or oppose such policies (+40)

If someone was attacking govt. measures supporting the recycling industry, I would stick up for the govt. (+28)

I would change my vote to support or oppose such policies (+13)

I would 'like' or 'share' a social media post supporting or opposing such policies (+8)

I would write to or email my local MP to support or oppose such policies (+0)

I would attend a community rally to support or oppose such policies (-6)

I would write to or email the editor of my local newspaper to support or oppose such policies (-15)

I would ring in to a local radio station to support or oppose such policies (-25)

Strongly Agree (9-10) Somewhat

Somewhat Agree (7-8)



50%

33%

42%

48%

38%

43%

45%

47%

42%

40%

14%

15%

20%

27%

29%

31%

34%

42%

80%

90%

100%

Below is a list of <u>actions</u> other people have said they would take in support of, or in opposition to, governments taking more action to create a more viable recycling industry. For each statement please indicate to what extent you agree or disagree that <u>you would take that action</u>, using a scale of 0 to 10, where 0 is strongly disagree and 10 strongly agree. If you don't know that's OK, just say so

30%

20%

13%

18%

13%

10%

8%

23%

23%

19%

16%

15%

11%

9%

17%

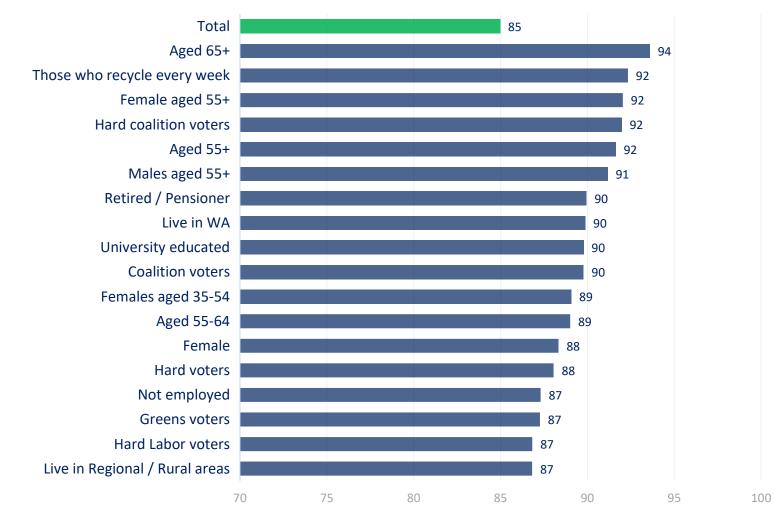


- Voters are willing to take action in support of government intervention
- 53% of voters said they would sign a paper petition, or put their name to an online petition, in relation to these policies.

Strong Support Groups



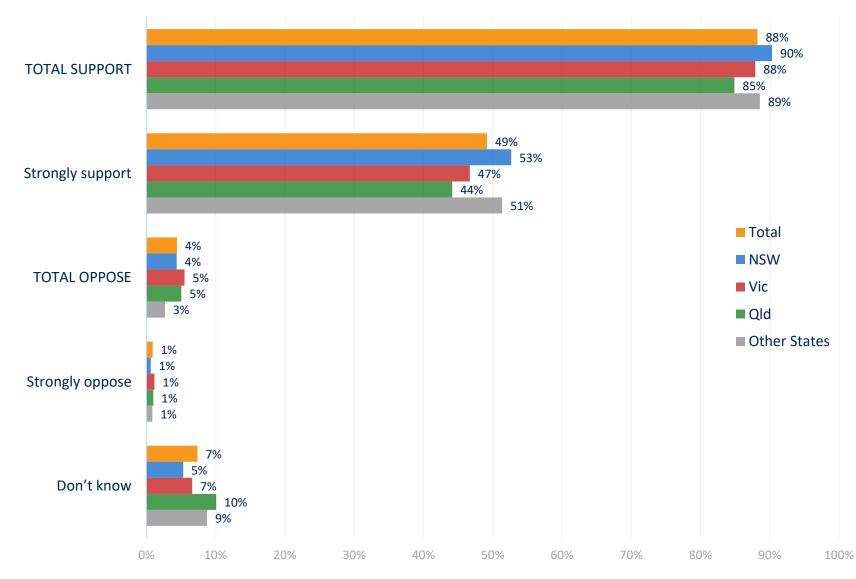
Net Support



From what you know or have read, seen or heard about the recycling sector in Australia, do you support or oppose Governments taking more action to create a sustainable recycling industry?

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Considered Support – State





 Considered support after messaging for and against government intervention remains high and very strong in all states

Sometimes people change their minds on a subject after they have learned more about it. Having read some arguments for and against, to what extent do you now support or oppose Governments taking action to create a more viable and sustainable recycling industry?