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RESEARCH BACKGROUND & METHODOLOGY
Background and objectives

Infrastructure Victoria has been asked to provide advice to government on waste infrastructure in Victoria, with final report due in April 2020.

To inform its advice, Infrastructure Victoria required research to better understand the attitudes and perceptions of Victorian households towards waste sorting practices, and their willingness to change their behaviour.

In June this year, Quantum Market Research was commissioned to undertake a quantitative survey with a representative sample of Victorian households.
Methodology

Online survey with n=1,055 Victorians sourced from panel provider Pureprofile.

Fieldwork was conducted between the 11th and 18th of July.

Average survey length was 10 minutes.

Respondents were sampled to be representative of the Victorian population based on age, gender and location.

Panel members were provided with a nominal ‘points-based’ incentive.
Waste collection and disposal services
Nearly a quarter of Victorian households have kerbside organic matter collection available

Kerbside waste collection services:

- General rubbish (i.e. that goes to landfill): 96% Yes, 3% No, 1% Don’t know
- Recycling (e.g. cardboard / glass / plastic / etc.): 96% Yes, 3% No, 1% Don’t know
- Garden/green waste: 77% Yes, 19% No, 5% Don’t know
- Organic matter (i.e. food scraps): 24% Yes, 61% No, 15% Don’t know

General rubbish and recycling collection services are available to the majority of Victorian households (96%). Garden and green waste collection is less readily available, to three quarters (77%) of households. Those in flats or apartments are more likely to not have the service available (33% don’t).

Organic matter collection is available to around one in four (24%). Those in major regional centres are significantly more likely to have the service (35%).

A minority of households are unaware of the availability of garden and green waste collection (5%) / organic matter collection (15%), indicating that community knowledge of and engagement with these services is lower.
Eight in ten regularly use their co-mingled recycling bin

Frequency of using council provided waste collection:

- Used a co-mingled recycling bin (n=968): 79% Regularly, 10% Sometimes, 11% Rarely/Never
- Used a garden/green waste bin for council collection (n=772): 68% Regularly, 17% Sometimes, 15% Rarely/Never
- Used an organic matter bin for council collection (n=242): 48% Regularly, 22% Sometimes, 31% Rarely/Never

Overall, one in five (21%) don’t regularly use their co-mingled bin. They are more likely to be younger (29% of those aged 18-29), live in inner metro Melbourne (24%) and/or occupy a flat or apartment (28%).

Q11 - For each activity, please indicate how often you’ve done this in the past year?
Base sizes shown in chart.
Among those with organic matter collection available, there’s confusion around its permanency and cost

**Perceived permanency of organic matter collection service:**
- Trial: 17%
- Permanent: 50%
- Don’t know: 33%

**Cost to use organic matter collection service:**
- 31% are charged a fee to use the service
- 32% are charged no fees
- 32% don’t know

Compared to other types of waste sorting, there is significant potential to lift community engagement/understanding of their council provided organic matter collection.

Q6 - You mentioned that your local council offers you organic matter (i.e. food scraps) collection. Is this a trial or a permanent collection? / Q7 - Is there a fee for you to use the organic matter (i.e. food scraps) collection service?
Base: All respondents who have council provided organic matter collection (n=242)
Of households offered a kitchen caddy for their organic matter, adoption was high at 79%

**Kitchen caddy usage:**

Base: Households with organic matter collection (n=242)

- 48% of households were offered a kitchen caddy to use
- 47% not offered a caddy
- 5% are unsure

Base: Households offered a kitchen caddy (n=116)

- 79% Of households use the kitchen caddy provided
- 20% Don’t use the caddy

When disposing of organics in their caddy:
- 70% are required to use a bag.
- 21% must have organic matter loose.
- 9% don’t know.

Provision for bagging demonstrably increases positive organic waste sorting practices. Those required to use a bag are more likely to regularly sort organic matter (70%) than those who must have matter loose in the caddy (46%).
### Non-kerbside waste sorting practices are less prevalently undertaken – but still common

**Frequency of using other waste disposal methods:**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Regularly</th>
<th>Sometimes</th>
<th>Rarely/Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used other waste disposal or recycling methods (e.g. soft plastics, batteries, electronics)</td>
<td>21%</td>
<td>34%</td>
<td>45%</td>
</tr>
<tr>
<td>Composted garden and/or other organic matter myself at home</td>
<td>30%</td>
<td>19%</td>
<td>51%</td>
</tr>
<tr>
<td>Taken recyclables elsewhere to be recycled</td>
<td>16%</td>
<td>22%</td>
<td>62%</td>
</tr>
<tr>
<td>Taken garden and/or other organic matter elsewhere to be composted</td>
<td>10%</td>
<td>15%</td>
<td>75%</td>
</tr>
</tbody>
</table>

Kerbside garden / green waste collection complements rather than replaces home composting. Among households with kerbside garden / green waste collection available, two thirds (61%) choose to do it themselves at home.

These pro-active waste sorting practices require a degree of self-motivation. That such a high proportion undertake them is indicative that a genuine commitment to positive behaviors is not uncommon.

Q11 - For each activity, please indicate how often you’ve done this in the past year?

Base: All respondents (n=1,005)
Waste sorting behaviours and barriers
Victorian households are consistently sorting their recyclable waste

Waste sorting practices: Recycling

- Sort / recycle all of this type of waste: 52%
- Sort / recycle the majority of this type of waste: 33%
- Sort / recycle some of this type of waste, but not that much: 10%
- Minimal / none at all + Do not produce this type of waste: 5%

Of those with kerbside co-mingled recycling available, 85% sort the majority or all of their recyclable waste.

Initiatives undertaken to get Victorian households to recycle have been successful. Whilst there is some room for improvement in this space, other areas will be the next frontier to create meaningful state-wide outcomes.

Q12 - To what extent do you believe that your household sorts / recycles all of the following types of waste that it produces?
Base: All respondents who have kerbside co-mingled recycling collection (n=968)
Retirees are more likely to recycle all waste, young people / students least likely

### Waste sorting practices: Recycling, by subgroups

<table>
<thead>
<tr>
<th></th>
<th>TOTAL (n=968)</th>
<th>Age</th>
<th>Household</th>
<th>Working status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>18-29 (n=217)</td>
<td>60+ (n=232)</td>
<td>Retired (n=169)</td>
</tr>
<tr>
<td>Sort / recycle all of this type of waste</td>
<td>52%</td>
<td>44%</td>
<td>63%</td>
<td>46%</td>
</tr>
<tr>
<td>Sort / recycle the majority of this kind of waste</td>
<td>33%</td>
<td>41%</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Sort / recycle some of this kind of waste, but not that much</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Minimal / none at all / do not produce this type of waste</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Significantly higher / lower than total

Interpreting these results, there is a suggestion that younger households, including house-shares, young families, etc. are less likely to be under complete control and therefore sort ‘the majority’ rather than ‘all’ their waste.

Q12 - To what extent do you believe that your household sorts / recycles all of the following types of waste that it produces?
Base: All respondents who have kerbside co-mingled recycling collection (n=968)
Among the most prevalent barriers to sorting recyclable waste is the perception that it all goes to landfill anyway

Barriers to sorting recyclable waste:

- I think contents of different bins all go to landfill anyway: 25%
- Not always sure which bin things should go into: 25%
- The design of some items makes them difficult to sort: 22%
- Not enough room in the right bins: 18%
- Other household members don’t sort / recycle reliably: 15%
- I don’t feel that my actions make a difference: 13%

All barriers are significantly more common among students and younger Victorians (under 30s).

Inadequate room in the right bins and the actions of other household members are particular concerns more common among families with children aged under 13 in the home.

Perceptions that all waste going to landfill correlates with the adoption of positive recycling habits. Addressing this is a fundamental way that recycling habits can be improved in Victoria.

Victorians who consistently sort their recyclable waste (all or the majority of it) are less likely to think the contents go to landfill (23% believe this). While a third (33%) of those who don’t consistently sort recyclables think it all goes to landfill.

Q13 - Which (if any) of the following make it harder for your household to sort the waste it produces?
Base: All respondents who have kerbside co-mingled recycling collection (n=968)

*Responses <13% are not shown
More than three quarters of households with garden/green waste collection consistently sort it

Waste sorting practices: Garden and green waste

- 56% Sort / recycle all of this type of waste
- 21% Sort / recycle the majority of this type of waste
- 10% Sort / recycle some of this type of waste, but not that much
- 13% Minimal / none at all + Do not produce this type of waste

Of those with kerbside garden/green waste collection available, 77% sort the majority or all of this waste.

Q12 - To what extent do you believe that your household sorts / recycles all of the following types of waste that it produces?
Base: All respondents who have kerbside garden/green waste collection (n=772)
Having little room in the right bins has an impact on garden and green waste sorting practices

<table>
<thead>
<tr>
<th>Barriers to sorting garden and green waste</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not enough room in the right bins</td>
<td>18%</td>
</tr>
<tr>
<td>I think contents of different bins all go to landfill anyway</td>
<td>16%</td>
</tr>
<tr>
<td>I don’t feel that my actions make a difference</td>
<td>9%</td>
</tr>
<tr>
<td>Not always sure which bin things should go into</td>
<td>8%</td>
</tr>
<tr>
<td>Other household members don’t sort / recycle reliably</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t have the room for separate bins / to separate materials in my home</td>
<td>5%</td>
</tr>
<tr>
<td>Find it too dirty / smelly</td>
<td>4%</td>
</tr>
</tbody>
</table>

Younger Victorians are more likely to feel that these barriers impact their ability to sort garden and green waste.

Those who live in a semi-detached house are more likely to say they don’t have the room for separate bins (9%).

Q13 - Which (if any) of the following make it harder for your household to sort the waste it produces?
Base: All respondents who have kerbside garden/green waste collection (n=772)
*Responses <4% are not shown
Adoption of kerbside organic waste collection is lower

Waste sorting practices: Organic matter

- Sort / recycle all of this type of waste: 43%
- Sort / recycle the majority of this type of waste: 23%
- Sort / recycle some of this type of waste, but not that much: 19%
- Minimal / none at all + Do not produce this type of waste: 15%

Of those with kerbside organic matter collection available, 66% sort the majority or all of this waste.

Compared to other kerbside collections, organic matter isn’t sorted as consistently.

Older Victorians aged over 60 are the most diligent in sorting their organic matter waste, with 77% sorting the majority or all of it.

Q12: To what extent do you believe that your household sorts / recycles all of the following types of waste that it produces?
Base: All respondents who have kerbside organic matter collection (n=242)
The belief that all waste goes to landfill also impacts the motivation to sort organic waste

Barriers to sorting organic matter waste:

- I think contents of different bins all go to landfill anyway: 21%
- Find it too dirty / smelly: 17%
- Not always sure which bin things should go into: 13%
- Other household members don't sort / recycle reliably: 13%
- I don't feel that my actions make a difference: 12%
- Not enough room in the right bins: 11%
- Don't have the room for separate bins / to separate materials in my home: 9%

Those in semi-detached houses (i.e. terrace or town houses) are more than twice as likely to have issue with the mess or odor (31%) and not have the room for separate bins or to separate materials in their home (25%). These issues are less of a concern among those in separate / detached houses.

Available space in the home may be one of the factors which leads the retirement (empty nester) generation to more diligently sort their organic matter.

Q13 - Which (if any) of the following make it harder for your household to sort the waste it produces?
Base: All respondents who have kerbside organic matter collection (n=242)

*Responses <9% are not shown
Attitudes towards packaging
The majority of Victorians try to buy or avoid certain types of packaging when shopping

**Current shopping behaviours:**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Somewhat Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel forced to buy overpackaged items as there are no suitable alternatives available</td>
<td>35%</td>
<td>47%</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>I try to buy products with recycled packaging</td>
<td>32%</td>
<td>46%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>I avoid buying products with excess packaging</td>
<td>29%</td>
<td>45%</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>I avoid buying products with non-recyclable packaging</td>
<td>19%</td>
<td>43%</td>
<td>32%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Consumers take active steps to be wiser when shopping. A majority try to buy products with recycled packaging (78%) and avoid excess packaging (74%) or non-recyclable packaging (62%).

Despite conscious shopping habits, eight in ten (82%) feel forced to buy overpackaged items because there are no suitable alternatives.

**What consumers commonly look for on packaging:**

- Labelling/symbols indicating it’s recyclable (53%)
- Biodegradable packaging (38%)
- Amount of recycled content (28%)
- Don’t look for any of these things (28%)
Concerns about packaging waste have been increasing over time

Concerns about packaging waste:

- Much more concerned about packaging waste now: 45%
- Slightly more concerned about packaging waste now: 33%
- No more or less concerned now: 20%
- Slightly less concerned about packaging waste now: 1%
- Much less concerned about packaging waste now: 1%

Q19 - How concerned are you about product packaging waste now, compared to five years ago?

Base: All respondents (n=1,055)

Concern is significantly higher among younger Victorians aged 18-29 (85%)

Those who are more concerned about packaging waste than five years ago report more frustration with supermarkets, the government and the lack of alternatives available, compared to those no more concerned. They’re also more likely to avoid or buy certain types of packaging when shopping.

Concern for packaging waste creates frustrations among consumers. Engagement with the topic lends itself to more conscious shopping behaviours – albeit, these are limited to the alternatives (and potential initiatives) available to them.
There’s widespread frustration towards both supermarkets and government for excessive packaging waste

Attitudes towards packaging:

I'm frustrated at supermarkets/retailers for the amount of unnecessary plastic packaging they use

- Strongly agree: 48%
- Somewhat agree: 35%
- Somewhat disagree: 14%
- Strongly disagree: 2%

I would switch to an alternative brand or product if they had more environmentally-friendly packaging

- Strongly agree: 34%
- Somewhat agree: 46%
- Somewhat disagree: 18%
- Strongly disagree: 3%

The Victorian government is not doing enough to combat packaging waste

- Strongly agree: 39%
- Somewhat agree: 42%
- Somewhat disagree: 16%
- Strongly disagree: 3%

I believe supermarkets/retailers when they announce that they’re reducing packaging and single-use plastics

- Strongly agree: 19%
- Somewhat agree: 45%
- Somewhat disagree: 26%
- Strongly disagree: 9%

Four in five Victorians (81%) feel the Victorian government could be doing more to combat packaging waste. Younger Victorians (aged under 30) are more likely to hold this sentiment (86%).

Over a third (36%) don’t believe supermarkets or retailers when they announce plans to reduce packaging and single-use plastics. Those aged under 30 are most likely to believe supermarkets and retailers when they make these claims (74%) while those over 50 are most cynical – just 57% have faith.

There is clearly a widespread groundswell of potential support for new initiatives to combat packaging waste.
There is no consensus on who is most responsible for reducing packaging waste

Rank the below in terms of how important you think they are in reducing Victoria’s packaging waste:

% Ranked number 1:

- Government legislation: 29%
- Innovations by packaging designers/manufacturers: 26%
- Consumers taking more responsibility: 23%
- Supermarkets/retailers being mindful of the products they sell: 21%

Q22 - We’d like you to rank the below in terms of how important you think they are in reducing Victoria’s packaging waste. Base: All respondents (n=1,055)

Consumers are split on who is most responsible. The interpretation from this may be that the responsibility is a shared one.
Willingness to change and response to initiatives
The importance of reducing non-recovered (landfill) waste in Victoria is widely agreed upon

Perceived importance of reducing non-recovered waste:

- Very important: 65%
- Somewhat important: 27%
- Not important: 6%
- Don’t know/can’t say: 1%

93% Of Victorian households feel it’s important to reduce non-recovered waste

While perceived importance is high, younger Victorians are marginally less likely than others to feel it’s very important (60%) to reduce non-recovered waste. As per other findings in this report, they tend to be less engaged in the topic and less diligent in sorting practices compared to older cohorts.

Q17 - To what extent do you think it is important to reduce non-recovered (landfill) waste in Victoria?
Base: All respondents (n=1,055)
Victorians have a theoretical willingness to change the way their households sort their waste

Openness to changing how their household sorts its waste:

- Very open to change: 89%
- Somewhat open to change: 7%
- Not very open to change: 5%
- Not open to change at all: 36%
- Don’t know: 5%
- Other: 2%

Q14: Are you open to making changes to how your household sorts its waste (i.e. how you separate out the things you throw away)?
Base: All respondents (n=1,055)

This finding is consistent across demographics; openness to improving waste sorting practices is widespread, including among younger cohorts.
When it comes to reducing landfill waste, the environment matters most to Victorians

Which do you think are the most important reasons to reduce non-recovered (landfill) waste in Victoria?

% Ranked number 1:

- To preserve and protect the environment: 70%
- Reducing the cost of waste management (paid by taxpayers): 16%
- Reducing impact on residents near landfills: 9%
- Job creation in resource recovery industries: 7%

Q18 - Which do you think are the most important reasons to reduce non-recovered (landfill) waste in Victoria?
Base: All respondents (n=1,055)

By focusing on positive environmental impacts, this finding may guide communications strategies which aim to incite the desired behavior change.
Initiatives involving service provision and infrastructure solutions attract widespread support

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Strongly support</th>
<th>Somewhat support</th>
<th>Do not support</th>
<th>Don’t know / can’t say</th>
<th>NET: Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>More recycling bins in public places</td>
<td>74%</td>
<td>22%</td>
<td>2%</td>
<td></td>
<td>95%</td>
</tr>
<tr>
<td>More biodegradable items to be available in stores and from hospitality venues</td>
<td>66%</td>
<td>26%</td>
<td>3%</td>
<td></td>
<td>93%</td>
</tr>
<tr>
<td>A container deposit scheme</td>
<td>67%</td>
<td>24%</td>
<td>6%</td>
<td></td>
<td>92%</td>
</tr>
<tr>
<td>Building of waste-to-energy plants</td>
<td>66%</td>
<td>27%</td>
<td>2%</td>
<td></td>
<td>92%</td>
</tr>
<tr>
<td>Shared community composting facilities in your local area</td>
<td>45%</td>
<td>38%</td>
<td>7%</td>
<td>10%</td>
<td>83%</td>
</tr>
</tbody>
</table>

Q15 - To what extent would you support the following initiatives?
Base: All respondents (n=1,055)

At a high-level (i.e. without further explanation being provided), there is minimal resistance to new services being provided to improve waste sorting.

Caution: High-level / theoretical support only – no further detail was provided to respondents.
Diversified council collection services attract widespread support

Support for initiatives:

- **Collection of garden/green waste by your council**
  - Strongly support: 72%
  - Somewhat support: 21%
  - Do not support: 3%
  - Don’t know / can’t say: 4%
  - **NET: Support 93%**

- **Separating different recyclable materials (e.g. cardboard / glass / plastic etc.) each into their own individual bins for collection by council**
  - Strongly support: 49%
  - Somewhat support: 36%
  - Do not support: 11%
  - Don’t know / can’t say: 4%
  - **NET: Support 85%**

- **Separate collection of glass by your council**
  - Strongly support: 48%
  - Somewhat support: 37%
  - Do not support: 8%
  - Don’t know / can’t say: 7%
  - **NET: Support 85%**

- **Collection of organic matter (e.g. food scraps) by your council**
  - Strongly support: 51%
  - Somewhat support: 31%
  - Do not support: 10%
  - Don’t know / can’t say: 8%
  - **NET: Support 81%**

\*Strongly support \* Somewhat support \* Do not support \* Don’t know / can’t say

Q15 - To what extent would you support the following initiatives?

Base: All respondents (n=1,055)

Caution: High-level / theoretical support only – no further detail was provided to respondents.

Compared to the provision of new services (previous slide), Victorians are somewhat more reserved in their support for initiatives which require their proactive input. However, theoretical support for separate recyclables collection is high overall.
Government interventions are widely supported

Support for initiatives:

- **A mandatory requirement that all single-use packaging be made from recycled materials**
  - Strongly support: 57%
  - Somewhat support: 31%
  - Do not support: 5%
  - Don’t know / can’t say: 6%
  - **NET: Support: 88%**

- **A state-wide ban on some single-use plastic items**
  - Strongly support: 53%
  - Somewhat support: 33%
  - Do not support: 11%
  - Don’t know / can’t say: 3%
  - **NET: Support: 86%**

- **Government legislation limiting the amount of packaging on grocery items**
  - Strongly support: 55%
  - Somewhat support: 30%
  - Do not support: 9%
  - Don’t know / can’t say: 6%
  - **NET: Support: 85%**

- **Government legislation mandating that employers must provide recycling facilities for their employees**
  - Strongly support: 52%
  - Somewhat support: 32%
  - Do not support: 8%
  - Don’t know / can’t say: 8%
  - **NET: Support: 84%**

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When imposed on the commercial / industry sector (rather than consumers), government interventions attract widespread support from the Victorian public.

Caution: High-level / theoretical support only – no further detail was provided to respondents.
Initiatives relating to bans or penalties against sorting practices at home are less widely supported

Support for initiatives:

<table>
<thead>
<tr>
<th>Initiative</th>
<th>NET: Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is a ban on recyclables (e.g. cardboard / glass / plastic / etc.) in household general rubbish bins and a separate bin is provided</td>
<td>80%</td>
</tr>
<tr>
<td>There is a ban on organic waste (food scraps) in household general rubbish bins and a separate organic waste bin is provided</td>
<td>68%</td>
</tr>
<tr>
<td>Penalties for putting waste in the wrong bin</td>
<td>58%</td>
</tr>
<tr>
<td>Additional council fee for waste collection to fund sorting facilities (rather than householder sorting their own waste)</td>
<td>45%</td>
</tr>
</tbody>
</table>

The least appealing initiative is an additional fee to outsource sorting facilities – 46% do not support the concept. Those more likely to support it are aged under 40 (58%), have children aged under 13 in the home (52%), work full time (50%), and/or with annual incomes over $150,000 (52%).

As they are already doing the right thing, most do not object to a ban on recyclables in the general rubbish. However, the imposition of penalties may be a step too far as it incites widespread non-support.

Caution: High-level / theoretical support only – no further detail was provided to respondents.

Q15 - To what extent would you support the following initiatives?
Base: All respondents (n=1,055)
Support for a pay per kilogram solution is polarising, with a quarter (28%) not supportive

To what extent would you support an initiative which asked you to pay per kg of non-recyclable waste your household produces?

Initiative description:

At present, each household pays a flat rate to the council for waste collection.

An alternative system would be to collect sorted recoverable waste (e.g. glass / cardboard / plastic / garden waste / organic matter) at no charge...

...But to charge a variable fee per kilogram for any non-recoverable or unsorted (landfill) waste.

Households which sort / recycle properly may find themselves better off.

Strongly support: 25%
Somewhat support: 37%
Do not support: 28%
Don’t know/can’t say: 10%

Support a solution to pay per kg of recyclable waste

As would be intuitive, those who already sort all their recycling are more likely to strongly support this scheme.

Q16 - To what extent would you support an initiative which asked you to pay per kg of non-recyclable waste your household produces?
Base: All respondents (n=1,055)
A third (33%) of Victorians won’t pay extra for more easily recycled packaging, but others would accept a small charge

Q23 - What is the most you would be willing to pay extra if it was packaged in a way that was more easily recyclable?

Base: All respondents (n=1,055)

Initiative description:

It sometimes costs more to package a product in a way that’s easily recyclable.

We asked respondents to think about a standard packaged item they might buy in the supermarket e.g. something in the refrigerator aisle and tell us how much they would be willing to pay if it were packaged in a more easily recyclable way.

45% would pay between 1 and 10 cents extra
Incentivising recycling and improved symbols on packaging are most likely to drive households to change

<table>
<thead>
<tr>
<th>Most influential in supporting household’s to change how they sort their waste:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving a financial incentive on recycling (e.g. returning bottles)</td>
<td>59%</td>
</tr>
<tr>
<td>More symbols on items so I know which bin to put them in</td>
<td>50%</td>
</tr>
<tr>
<td>More general information about waste and recycling processes in Victoria</td>
<td>42%</td>
</tr>
<tr>
<td>Council-provided in-home waste sorting bins</td>
<td>40%</td>
</tr>
<tr>
<td>An advertising campaign that educates about waste sorting</td>
<td>35%</td>
</tr>
<tr>
<td>More different coloured bins from my council</td>
<td>33%</td>
</tr>
<tr>
<td>Material in the mail which detail what to do with different types of waste</td>
<td>32%</td>
</tr>
<tr>
<td>More frequent bin collection</td>
<td>25%</td>
</tr>
<tr>
<td>None of these would support me in better sorting my household waste</td>
<td>8%</td>
</tr>
</tbody>
</table>

Q24 - Which of the following would be influential in supporting you to positively change the way you sort household waste?
Base: All respondents (n=1,055)

As Victorians already indicate a high degree of willingness and motivation to adopt improved waste sorting practices – a financial incentive (despite being supported) may not be warranted.

In this case, the most influential initiatives would be those which facilitate positive behavior change, and education (particularly on environmental impact and confirmation that sorted waste does not go to landfill).
## Sampling: Age, gender, location and dwelling type

<table>
<thead>
<tr>
<th>Age</th>
<th>Number of respondents</th>
<th>Proportion of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>87</td>
<td>9%</td>
</tr>
<tr>
<td>25-29</td>
<td>141</td>
<td>14%</td>
</tr>
<tr>
<td>30-39</td>
<td>203</td>
<td>20%</td>
</tr>
<tr>
<td>40-49</td>
<td>178</td>
<td>18%</td>
</tr>
<tr>
<td>50-59</td>
<td>160</td>
<td>16%</td>
</tr>
<tr>
<td>60-69</td>
<td>123</td>
<td>12%</td>
</tr>
<tr>
<td>70-79</td>
<td>113</td>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>Number of respondents</th>
<th>Proportion of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inner Metro Melbourne</td>
<td>499</td>
<td>50%</td>
</tr>
<tr>
<td>Outer Metro Melbourne</td>
<td>255</td>
<td>25%</td>
</tr>
<tr>
<td>Major Regional Centres</td>
<td>134</td>
<td>13%</td>
</tr>
<tr>
<td>Rural</td>
<td>117</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Number of respondents</th>
<th>Proportion of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>498</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>507</td>
<td>50%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>Number of respondents</th>
<th>Proportion of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inner Metro Melbourne</td>
<td>499</td>
<td>50%</td>
</tr>
<tr>
<td>Outer Metro Melbourne</td>
<td>255</td>
<td>25%</td>
</tr>
<tr>
<td>Major Regional Centres</td>
<td>134</td>
<td>13%</td>
</tr>
<tr>
<td>Rural</td>
<td>117</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dwelling type</th>
<th>Number of respondents</th>
<th>Proportion of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Separate house</td>
<td>693</td>
<td>69%</td>
</tr>
<tr>
<td>Semi-detached house, row or terraced house</td>
<td>128</td>
<td>13%</td>
</tr>
<tr>
<td>Flat or apartment</td>
<td>173</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
<td>1%</td>
</tr>
</tbody>
</table>
### Sampling: Employment, education, household type and income

<table>
<thead>
<tr>
<th>Employment status</th>
<th>Number of respondents (n=)</th>
<th>Proportion of sample (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>1,055</td>
<td>100%</td>
</tr>
<tr>
<td>Full time work</td>
<td>392</td>
<td>39%</td>
</tr>
<tr>
<td>Part time/casual work</td>
<td>202</td>
<td>20%</td>
</tr>
<tr>
<td>Retired</td>
<td>175</td>
<td>17%</td>
</tr>
<tr>
<td>Home duties</td>
<td>87</td>
<td>9%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>54</td>
<td>5%</td>
</tr>
<tr>
<td>Student</td>
<td>45</td>
<td>4%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>36</td>
<td>4%</td>
</tr>
<tr>
<td>Volunteer</td>
<td>5</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Highest qualification achieved</th>
<th>Number of respondents (n=)</th>
<th>Proportion of sample (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>1,055</td>
<td>100%</td>
</tr>
<tr>
<td>Masters / Doctorate</td>
<td>91</td>
<td>9%</td>
</tr>
<tr>
<td>Bachelor degree</td>
<td>318</td>
<td>32%</td>
</tr>
<tr>
<td>Diploma / Certificate</td>
<td>239</td>
<td>24%</td>
</tr>
<tr>
<td>Trade qualification</td>
<td>72</td>
<td>7%</td>
</tr>
<tr>
<td>Year 12 or below</td>
<td>271</td>
<td>27%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>14</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household type</th>
<th>Number of respondents (n=)</th>
<th>Proportion of sample (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>1,055</td>
<td>100%</td>
</tr>
<tr>
<td>Single person (no children)</td>
<td>225</td>
<td>22%</td>
</tr>
<tr>
<td>A couple (no children)</td>
<td>308</td>
<td>31%</td>
</tr>
<tr>
<td>A family (including separated/divorced) where most children are under 13 years</td>
<td>230</td>
<td>23%</td>
</tr>
<tr>
<td>A family (including separated/divorced) where most children are 13 years or older</td>
<td>195</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>47</td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual household income</th>
<th>Number of respondents (n=)</th>
<th>Proportion of sample (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>1,055</td>
<td>100%</td>
</tr>
<tr>
<td>Less than $25,000</td>
<td>79</td>
<td>8%</td>
</tr>
<tr>
<td>$25,000-$49,999</td>
<td>192</td>
<td>19%</td>
</tr>
<tr>
<td>$50,000-$74,999</td>
<td>183</td>
<td>18%</td>
</tr>
<tr>
<td>$75,000-$99,999</td>
<td>152</td>
<td>15%</td>
</tr>
<tr>
<td>$100,000-$149,999</td>
<td>163</td>
<td>16%</td>
</tr>
<tr>
<td>More than $150,000</td>
<td>130</td>
<td>13%</td>
</tr>
<tr>
<td>Not sure</td>
<td>13</td>
<td>1%</td>
</tr>
<tr>
<td>Rather not say</td>
<td>93</td>
<td>9%</td>
</tr>
</tbody>
</table>
Questionnaire

Q.4. Which of the following best describes your house structure? [M]

- Separate house: .................................................................................................3
- Semi-detached house, row or terraced house, town house: ......................2
- Flat or apartment: ............................................................................................3
- Other: ................................................................................................................N

Q.5. Are the following kerbside council waste collection services available to your household? [MK]

- Do not know: ....................................................................................................3
- Yes: ..................................................................................................................1
- No: ...................................................................................................................2

A. General rubbish (i.e. that goes to landfill): .................................................1
B. Recycling (e.g. cardboard / glass / plastics / etc.): ......................................2
C. Garden/green waste: .....................................................................................3
D. Organic matter (i.e. food scraps): .................................................................2

Q.6. You mentioned that your local council offers you organic matter (i.e. food scraps) collection. Is this a trial or a permanent collection? [MK]

- Trial: .................................................................................................................1
- Permanent: .....................................................................................................2
- Don't know: ....................................................................................................9

Q.7. Is there a fee for you to use the organic matter (i.e. food scraps) collection service? [MK]

- Yes, there is a fee to use the service: ...............................................................1
- No: ...................................................................................................................2
- Don't know: ....................................................................................................9
### Questionnaire

#### Q.8. Were you offered a ‘kitchen caddy’ to use with your organic matter (i.e. food scraps) collection service? [Y/N]

- Yes .......................................................... 3
- No ........................................................... 2
- Don’t know ................................................ 1

#### Q.9. Do you use the ‘kitchen caddy’ you were offered to dispose of organic matter (i.e. food scraps)? [Y/N]

- Yes .......................................................... 3
- No ........................................................... 2
- Don’t know ................................................ 1

#### Q.10. If using the ‘kitchen caddy’ to dispose of organic matter (i.e. food scraps), are you required to use a separate bag? [Y/N]

- Yes, dispose of organic matter in a bag within the caddy ........................................... 1
- No, organic matter must be loose within the caddy ...................................................... 1
- Don’t know ................................................ 1

### Q.11. Below is a list of activities. For each activity, please indicate how often you’ve done this in the past year?

<table>
<thead>
<tr>
<th>Activity Description</th>
<th>Regularly</th>
<th>Sometimes</th>
<th>Rarely/ Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Threw away organic waste in the bin (i.e. glass / food etc)</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>B) Used a separate recycling bin for food scraps (i.e. x bin just for food)</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>C) Threw away organic waste in the bin (i.e. glass / food etc)</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>D) Used organic waste in the bin for council collection</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>E) Composted garden and/or other organic matter yourself at home</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>F) Taked recyclables (e.g. cardboard / glass / plastic / etc.) to be recycled</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>G) Taked garden and/or other organic matter elsewhere to be composted</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>H) Used other waste disposal or recycling methods (kg of soft plastics, batteries, etc.)</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>I) Taked active measures to reduce the amount of waste I produce</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
Questionnaire

Q.12. You mentioned that your council offers the following kerbside waste collections service(s). To what extent do you believe that your household sorts / recycles all of the following types of waste that it produces? [0-10 RATING]

<table>
<thead>
<tr>
<th>DO NOT RATIONI</th>
<th>Sort / recycle all of this type of waste</th>
<th>Sort / recycle the majority of this type of waste</th>
<th>Sort / recycle some of this type of waste</th>
<th>Minimal or none at all</th>
<th>Do not produce this type of waste</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>[C] 100 [C] 0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

REPORT FOR EACH ANSWER. Q.12 CLOSES WHERE Q.12 CLOSES 3-4-3. I PRODUCE THIS TYPE OF WASTE DO NOT RATIONI.

Q.13. You mentioned that your council offers the following kerbside waste collections service.

[BASED FROM Q.12]

Of those recoverable materials which your council collects, which of any of the following make it harder for your household to sort the waste it produces? [0-10 RATING]

- Not sure what bin things should go into: ____________________________ 1
- I think contents of different bins all go to landfill anyway: ____________ 2
- I don’t feel that my actions make a difference: ________________________ 3
- [SHOW ONLY 10 Q-4 (Revealed)] The design of some items makes them difficult to sort: ____________________________ 4
- Not enough room in the right bins: ____________________________ 5
- Other household members don’t sort / recycle reliably: ____________ 6
- Don’t have the room for separate bins / to separate materials in my home: ____________ 7
- Find it too dirty / smelly: ____________________________ 8
- Please note to open a new window: don’t want to rinse out packaging before throwing away: ____________ 10
- Other (specify): ____________ 98
- None of the above: ____________ 99
Questionnaire

Q.16. All present, each household pays a flat rate to the council for waste collection.

An alternative system would be to collect sorted recyclable waste (e.g. glass / cardboard / plastic / garden waste / organic matter) at no charge, but to charge a variable fee per kilogram for any non-recyclable or unsorted (landfill) waste.

Households which sort / recycle properly may find themselves better off.

To what extent would you support an initiative which asked you to pay per kg of non-recyclable waste your household produces?

Strongly support: 
Slightly support: 
Neither support nor oppose: 
Don’t Know / Can’t say: 

Q.17. To what extent do you think it is important to reduce non-recyclable (landfill) waste in Victoria?

Very important: 
Somewhat important: 
Not important: 
Don’t know / Can’t say: 

Q.18. Which do you think are the most important reasons to reduce non-recyclable (landfill) waste in Victoria?

Please rank as many as apply. RANK THE ABOVE FROM 1 – 4.

To preserve / protect the environment: 
Job creation in resource recovery industries: 
Reducing cost of waste management (paid for by tax payers): 
Reducing impact on incidents near landfills: 
Other / none of the above [ ]: 

Q.19. How concerned are you about product packaging waste now, compared to five years ago? [x]

Much more concerned about packaging waste now: 
Slightly more concerned about packaging waste now: 
No more or less concerned now: 
Slightly less concerned about packaging waste now: 
Much less concerned about packaging waste now: 

Questionnaire

Q.15. What is the highest education level you’ve completed? [Select
Year 12 or below ................................................. 1
Trade qualification ............................................. 2
Diploma / Certificate .......................................... 3
Bachelor degree .................................................. 4
Masters / Doctorate ............................................. 5
Prefer not to say .................................................. 99

Q.16. Which of the following best describes your household situation? [Select
Single person (no children) ................................... 1
A couple (no children) ......................................... 2
A family (including separated/divorced) where most children are under 13 years ....... 3
A family (including separated/divorced) where most children are 13 years or older ....... 4
Other ................................................................. 57

Q.17. What is your current work situation? [Select
Full time ......................................................... 3
Part time/ Casual .............................................. 3
Self-employed ................................................ 4
Retired ............................................................ 5
Unemployed ................................................... 6
Home duties .................................................... 7
Student ......................................................... 8
Volunteer ......................................................... 9
Other ............................................................. 15

Q.18. What is your annual household income before tax? [In thousands]. Please select one [Select
Less than $25,000 .................................................. 1
$25,000-$49,999 ................................................ 2
$50,000-$74,999 ................................................ 3
$75,000-$99,999 ............................................... 4
$100,000-$124,999 ........................................ 5
$125,000-$149,999 .......................................... 6
$150,000-$174,999 .......................................... 7
$175,000-$199,999 .......................................... 8
$200,000 plus .................................................. 9
Not sure .......................................................... 57
Prefer not to say .............................................. 79

End with thanks (all):
Thank you for assisting us today. Your response to this questionnaire will be kept strictly confidential and will be used only for research purposes.
Quantum Market Research

Level 3, 650 Chapel Street,
South Yarra, VIC 3141, Australia

info@qmr.com.au