



C|T GROUP

Recycling and Waste Management Research

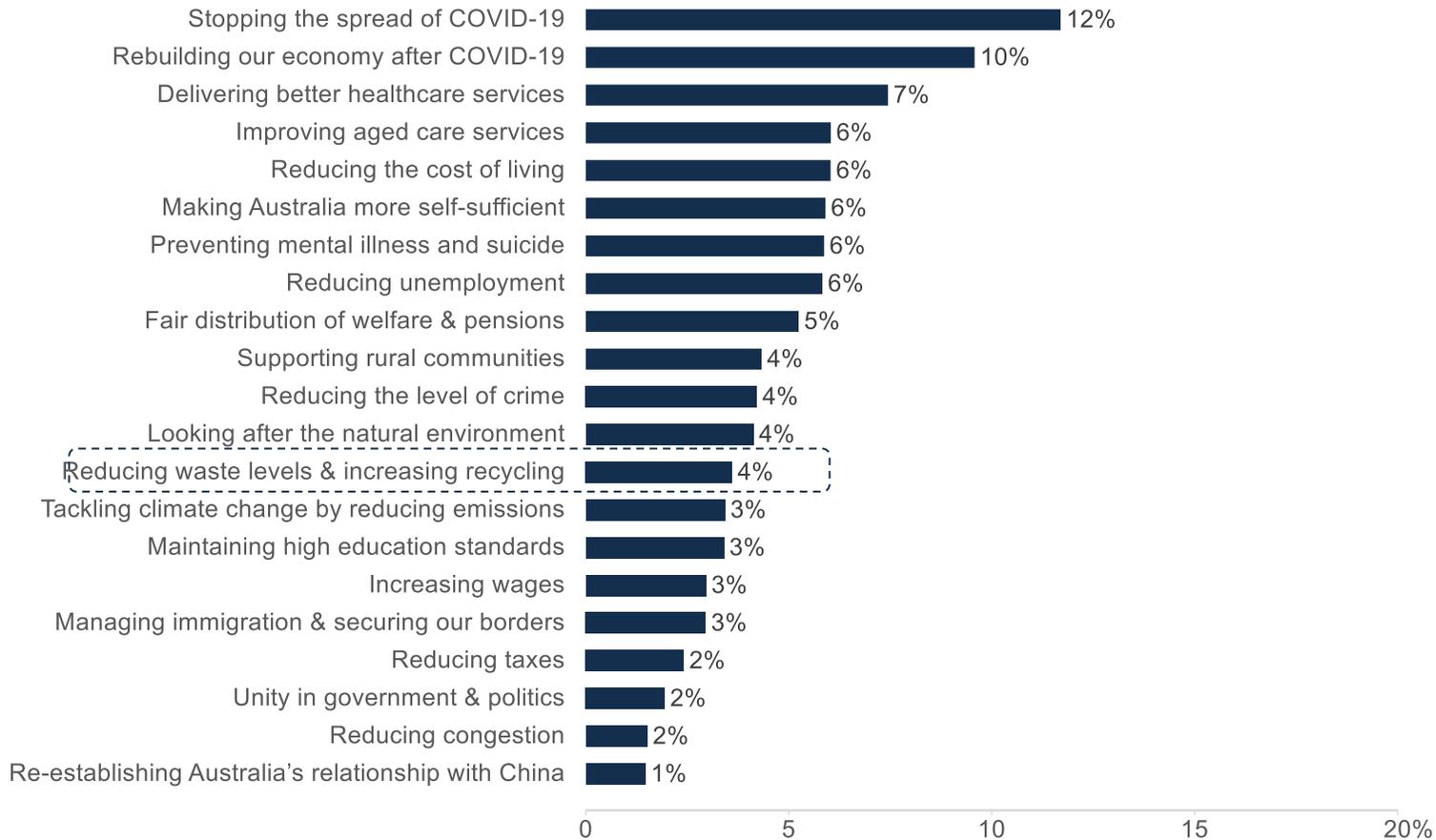
Omnibus Q1 2021



Methodology Summary

- Findings are based on an online survey of n=1,992 residents of Australia conducted between January 22 – 30, 2020
- Three previous rounds have been conducted:
 - Round 1 between 1 – 6 September 2019 with a sample size of n=2,000.
 - Round 2 between 15 – 23 March 2020 with a sample size of n=1,500.
 - Round 3 between 21 – 25 August 2020 with a sample size of n=2,011.
- The results are representative of age, gender, region and past vote (among 18+ year-olds) through sampling quotas and ex-post weighting where required.
- The maximum margin of error for this sample size is +/- 2.2% at a 95% confidence level. Higher margins of error exist for smaller subsamples and net scores.
- Research focused on tracking public sentiment across a range of issues, including underlying behaviors and attitudes in response to COVID-19, Government responses and policy developments across a range of industries.
- The latest version of this study includes high level metrics exploring public sentiment toward recycling and waste management policy issues.

Issue Agenda (Prob. Ranked 1st)



- Normalcy has not yet returned
- COVID-19 has not gone away as an issue priority in Australia
- The framing of the COVID-19 challenge is now reaching a balance between public health and economic priorities

Below is a list of issues that others have told us they'd like the Federal government to do something about. Thinking about what's happening in Australia today, please select the most & least important issue that you would like the Federal government to do something about?

Base: All participants (n=1,992)

Issues: Track (Rank among Tracked Issues)

Aug-2020	Feb-2021	Change
Stopping the spread of COVID-19	Stopping the spread of COVID-19	=
Delivering better healthcare services	Delivering better healthcare services	=
Reducing the cost of living	Improving aged care services	↑ 1
Improving aged care services	Reducing the cost of living	↓ 1
Fair distribution of welfare & pensions	Fair distribution of welfare & pensions	=
Supporting rural communities	Supporting rural communities	=
Reducing the level of crime	Reducing the level of crime	=
Looking after the natural environment	Looking after the natural environment	=
Managing immigration & securing our borders	Maintaining high education standards	↑ 1
Maintaining high education standards	Managing immigration & securing our borders	↓ 1
Reducing taxes	Reducing taxes	=
Unity in government & politics	Unity in government & politics	=
Reducing congestion	Reducing congestion	=

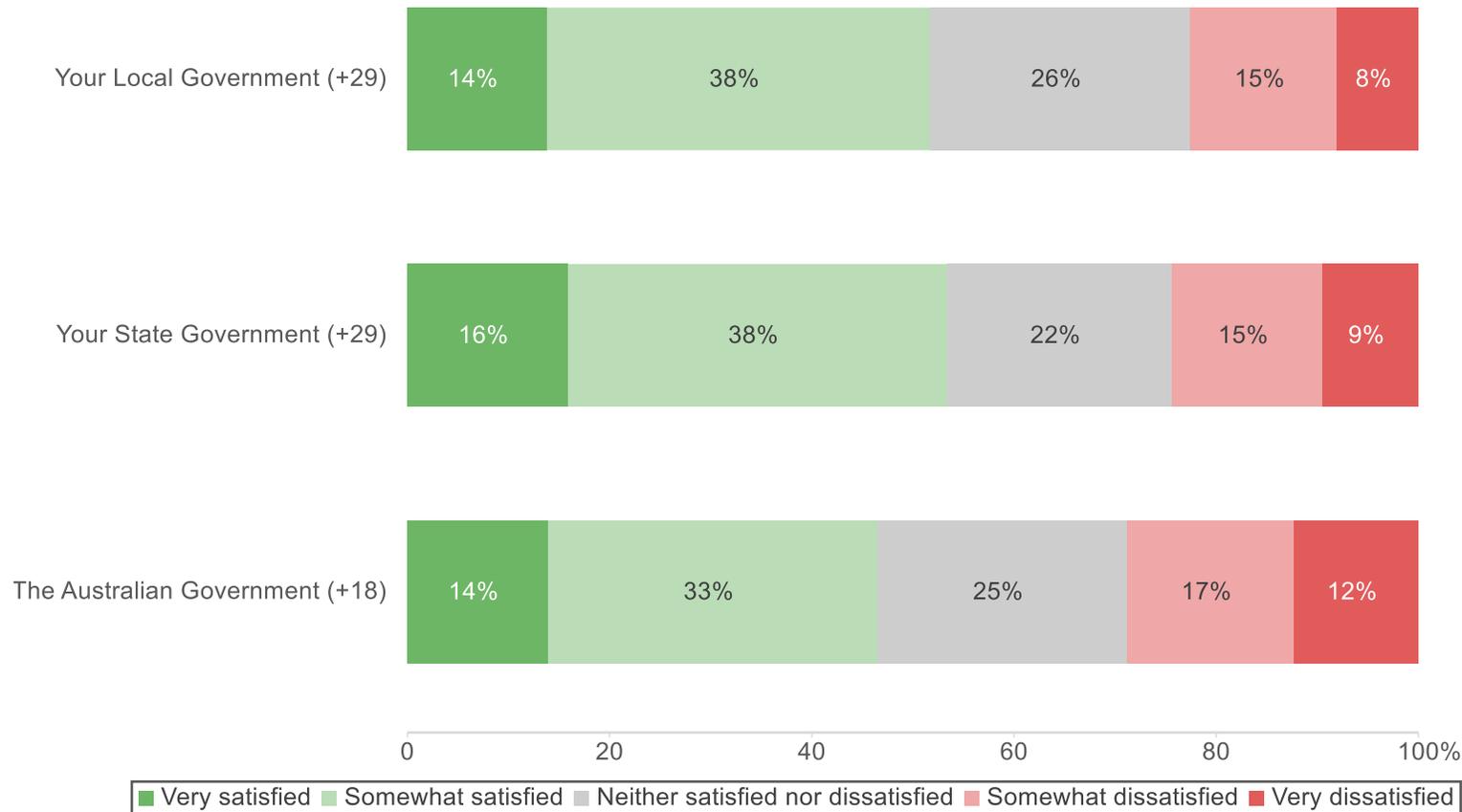
- The agenda remains relatively unchanged over the last 9 months

Below is a list of issues that others have told us they'd like the Federal government to do something about. Thinking about what's happening in Australia today, please select the most & least important issue that you would like the Federal government to do something about?

Base: All participants (Jan-2021: n=1,992; Aug-2020: n=2,011)



Satisfaction with Governments' Efforts



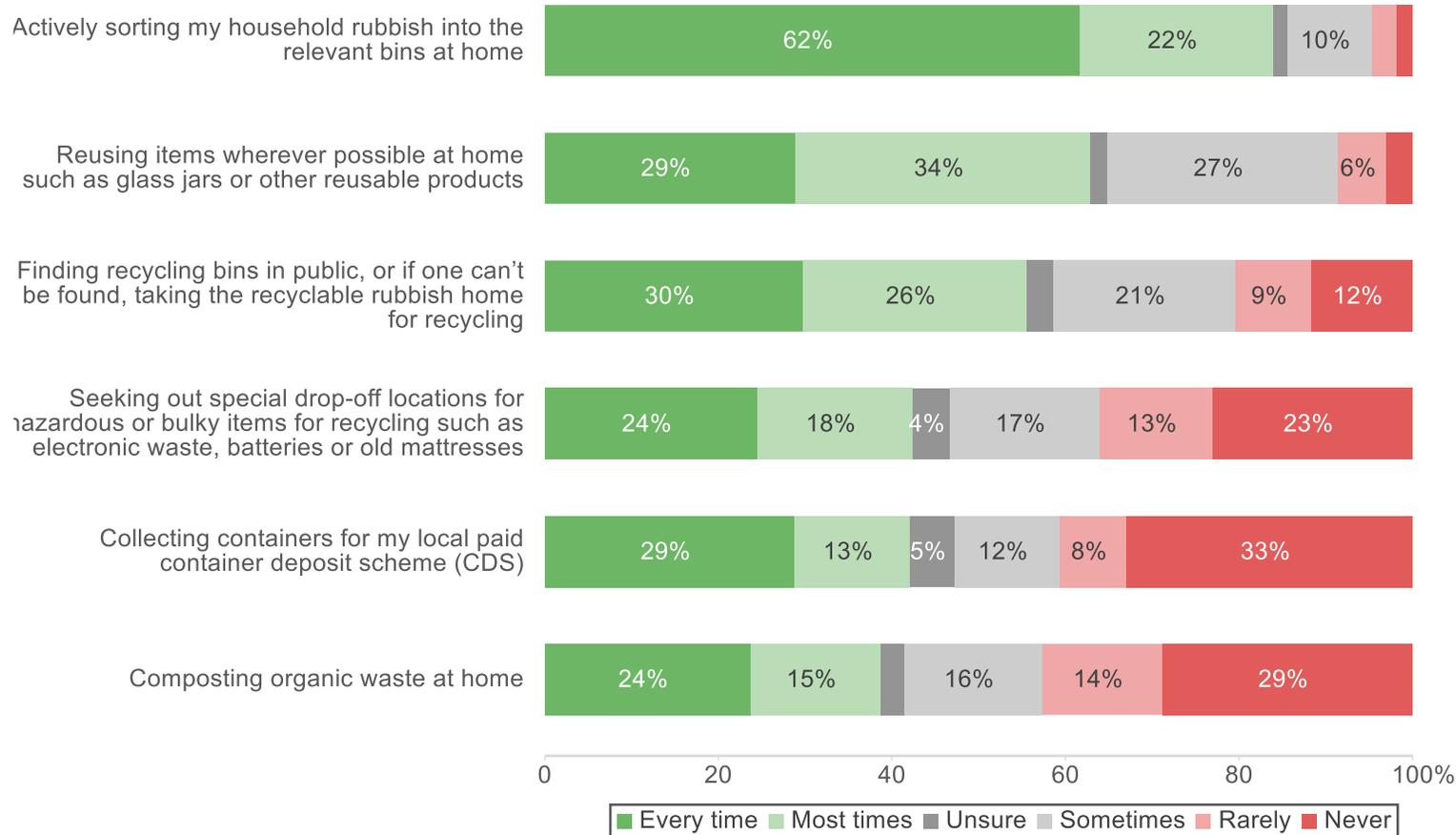
- Consistent perceptions across government jurisdictions despite varied touchpoints and policy responses.
- High level of softness in views (somewhat and neither), indicating political disengagement with governments on waste policy.

To what extent are you satisfied or dissatisfied with the efforts of each of the following governments in improving recycling?

Base: Australia Genpop (n=1,992)

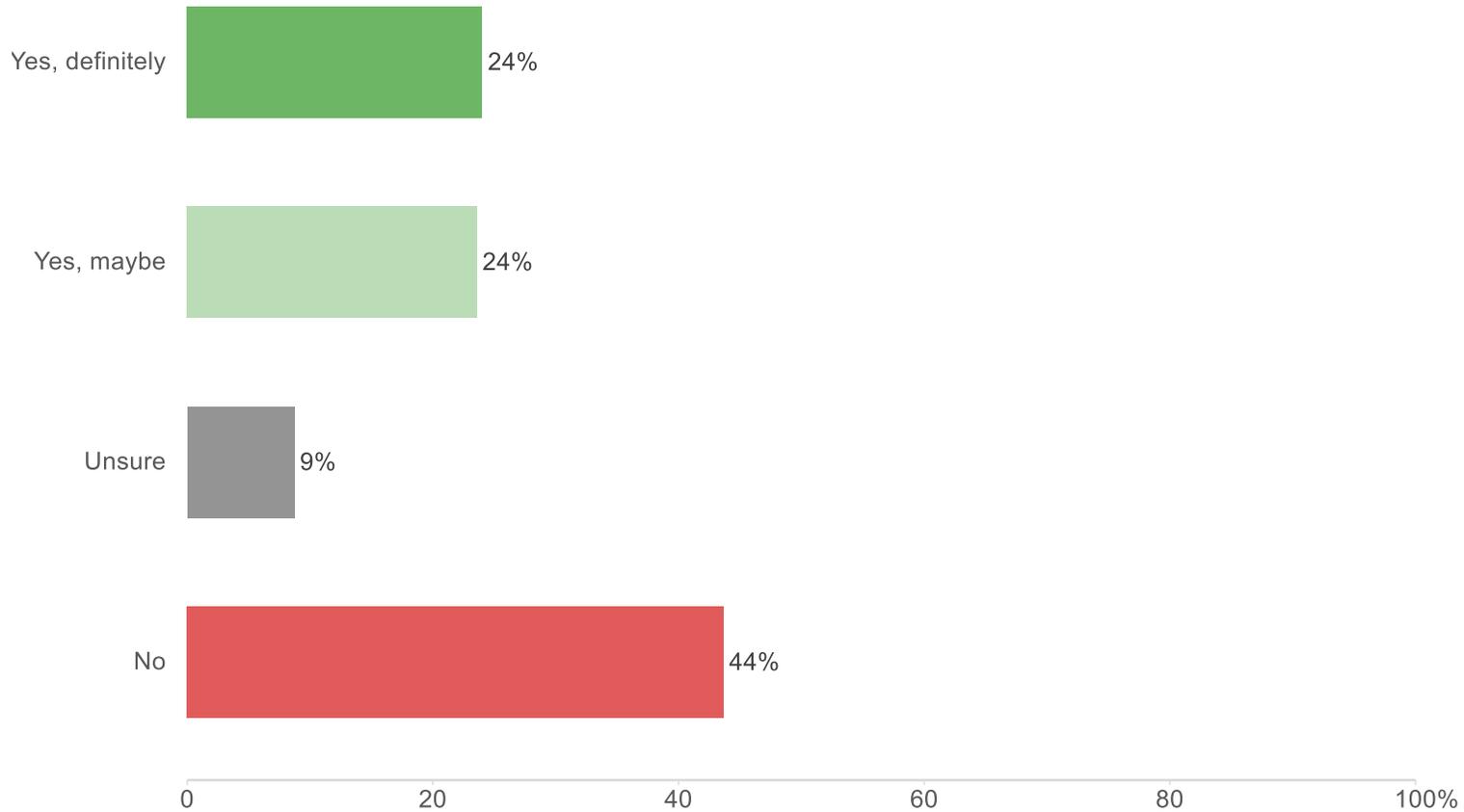


Waste and Recycling Behaviour



- Australian waste behaviors are misaligned with the common waste hierarchy, with a greater prevalence of recycling (sorting) than reusing.
- Organics composting remains the least prevalent waste behavior.

Awareness of Bans on Waste Exporting

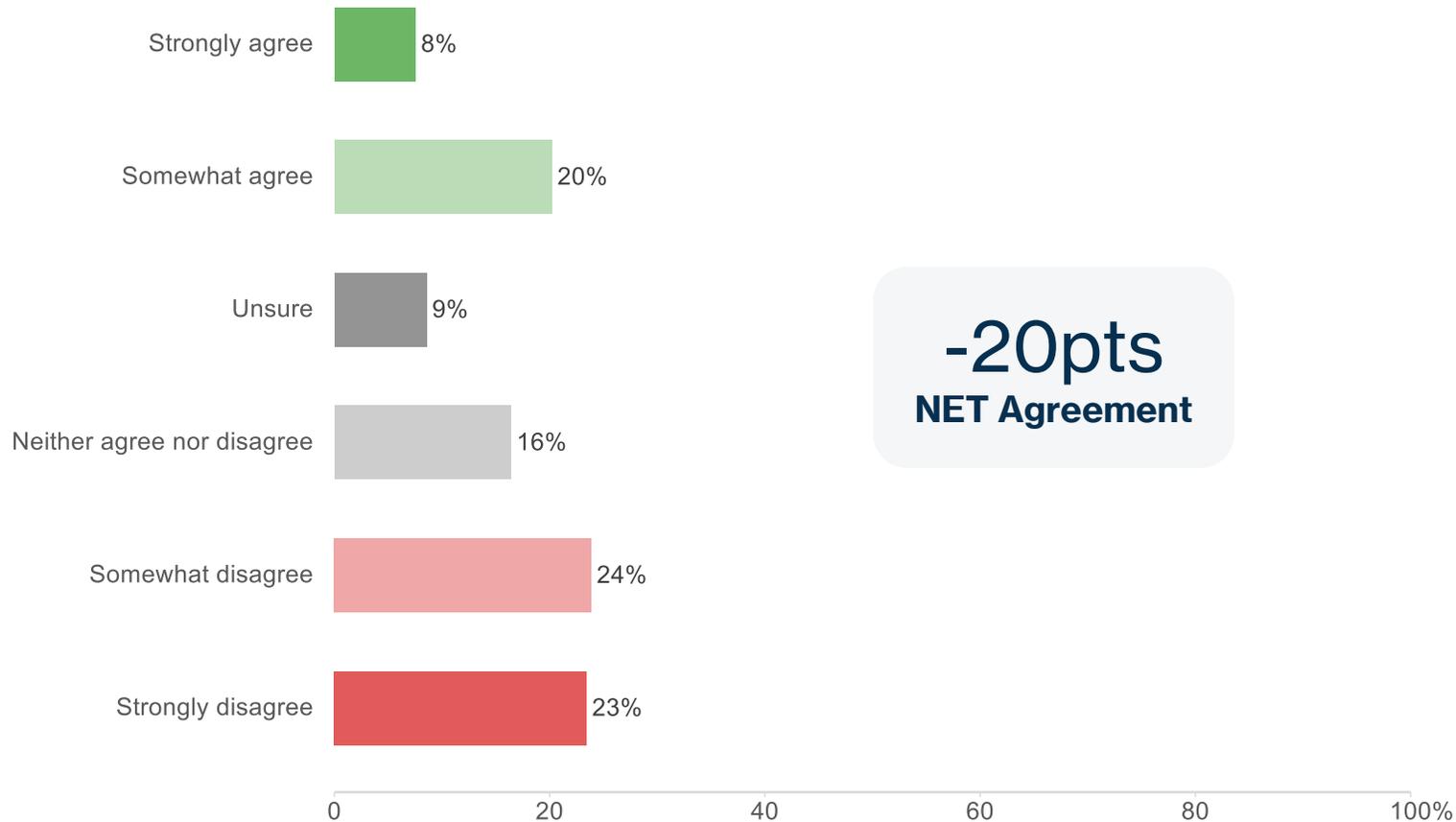


- True awareness remains low at less than a quarter of Australians.
- This will present political complications for the Federal Government in creating a political impetus for stimulating waste infrastructure investment.

Have you read, seen and heard anything about the introduction of bans on exporting certain Australian waste for overseas processing and disposal?
Base: Australia Genpop (n=1,992)



Agreement that Australia is Recycling Enough



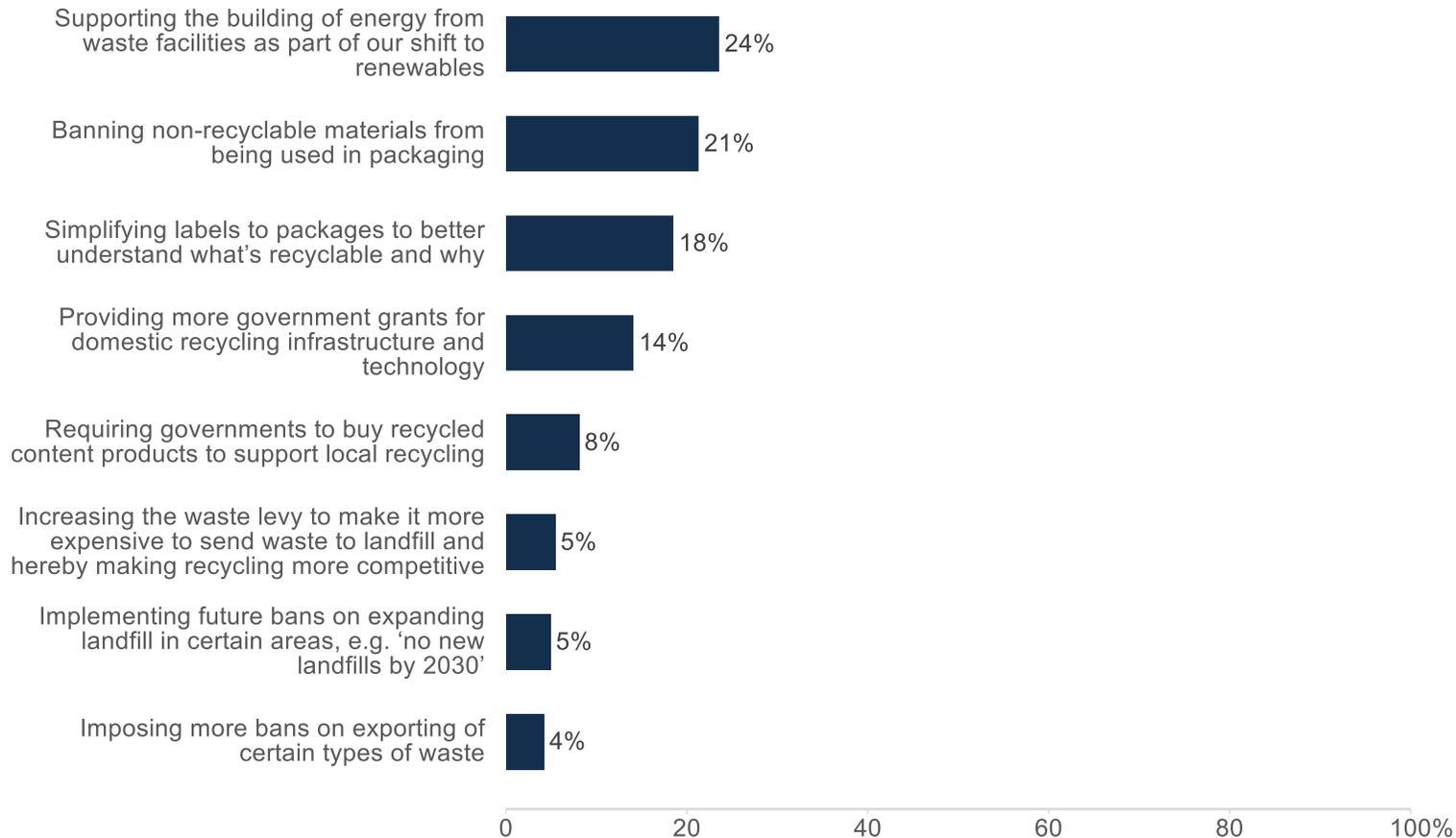
- Views on Australia's recycling performance is similarly weak (69% weak response),
- A near majority nominate insufficient recycling

Thinking about how much waste is recycled at the moment in Australia, to what extent do you agree or disagree that, as a country, we are recycling enough of our waste?

Base: Australia Genpop (n=1,992)



Australian Government Initiatives – Highest Priority

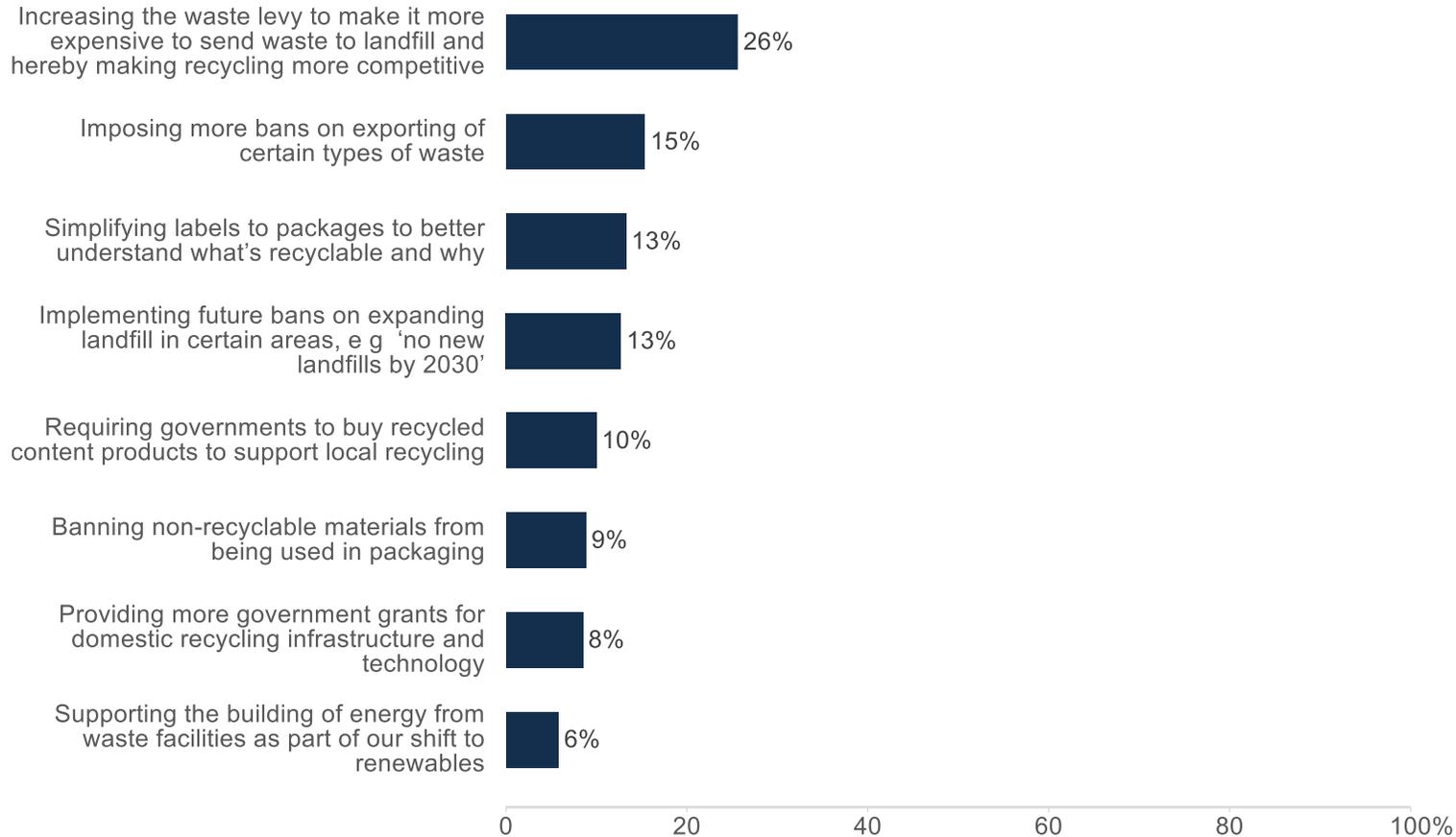


- Preferences across priority initiatives are relatively scattered (24% maximum prioritisation) indicating a lack of public consensus
- Supporting EfW as a means to increase recycling rates is the most frequently prioritised initiative
- Regulation of packaging materials is similarly supported

Below is a list of initiatives that the Australian Government can undertake to potentially increase recycling. Please select the initiative that you think should be the highest priority.
Base: Australia Genpop (n=1,992)



Australian Government Initiatives – Lowest Priority



- Reflecting cost of living sensitivity, opposition against waste levy increases is strongest
- Other initiatives show secondary (and comparable) opposition



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