

ACOR Public Opinion Research

REPORT

April 2018



C/T GROUP

Summary Methodology

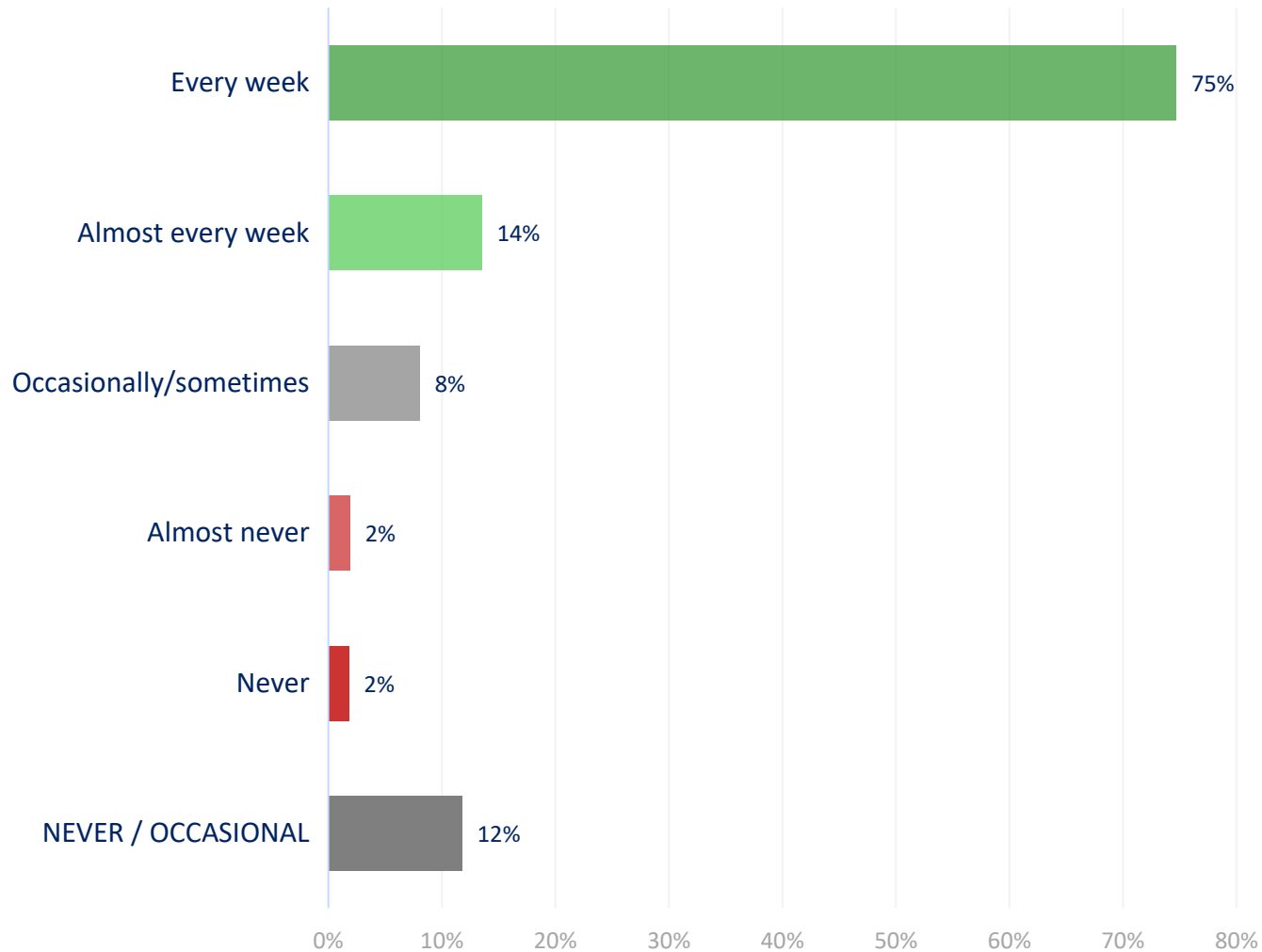


C|T GROUP

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



C|T GROUP

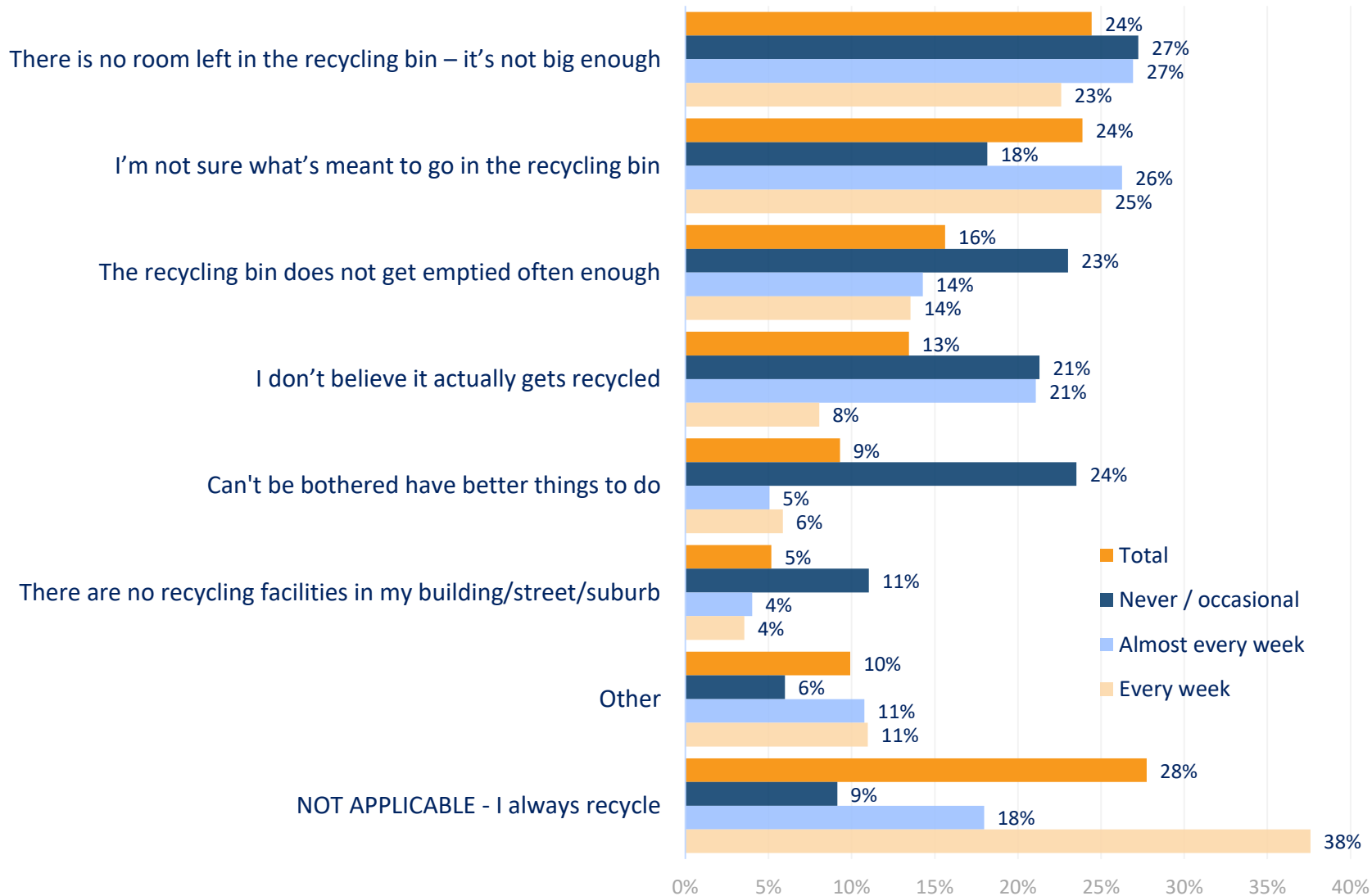
- Three quarters (75%) of Australians say that they separate recyclable material into a dedicated recycling bin **‘every week’** when putting their household garbage out for collection.
- A further 14% say that they recycle **‘almost every week’**
- 8% said they **occasionally/sometimes** recycle
- Only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

At home, when your household garbage is being put out for collection, how often does your household separate your recyclable material from your non-recyclable garbage and put it into a dedicated recycling bin?

Prompted reasons for not recycling – Habits



C|T GROUP



- 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.

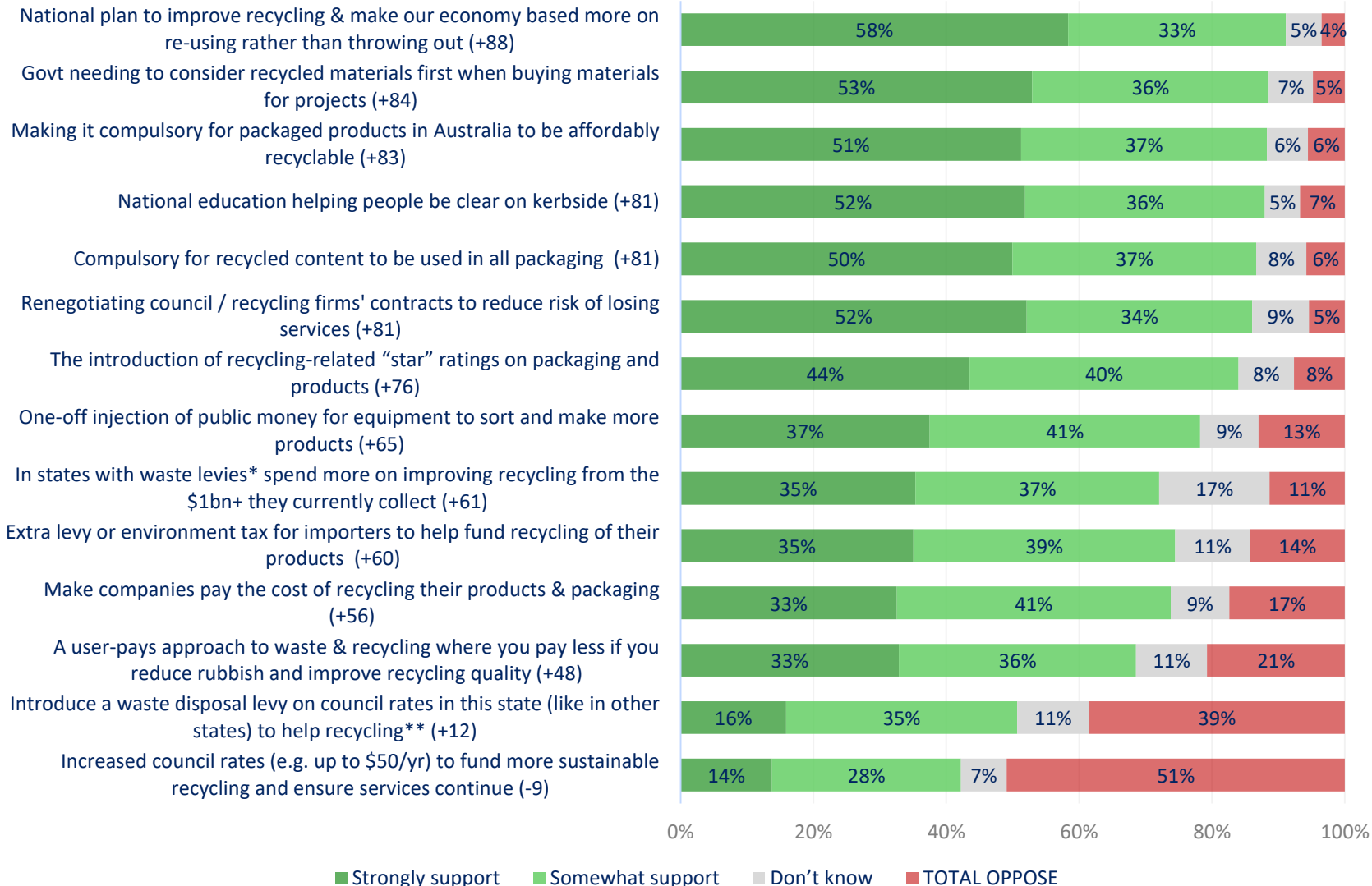
And to the extent that your household doesn't (or doesn't always) recycle, what are the reasons your household doesn't recycle?

NB: Multiple responses permitted. Base: Those who don't always recycle n=486

Support for Measures



C|T GROUP



- 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

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

Net Support for measures – State



C|T GROUP



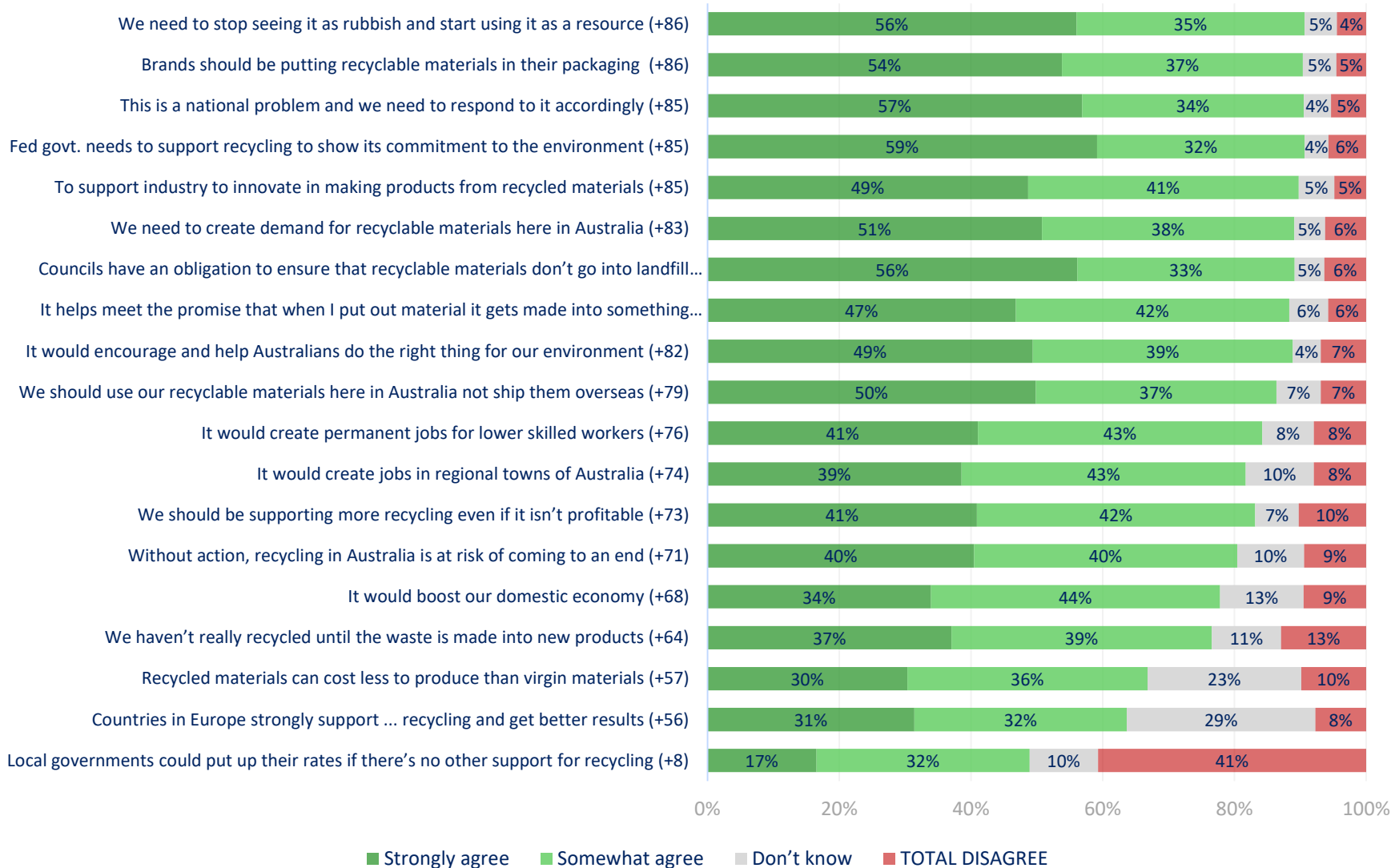
Several ideas have been put forward of things that governments in Australia could do to create a more viable and sustainable recycling sector in Australia. To what extent would you support or oppose governments in Australia introducing of each of these measures?

* Asked in NSW, VIC, WA, SA and ACT ** Asked in QLD, TAS and NT only

Credibility of Messages Supporting Recycling Regulation



C|T GROUP



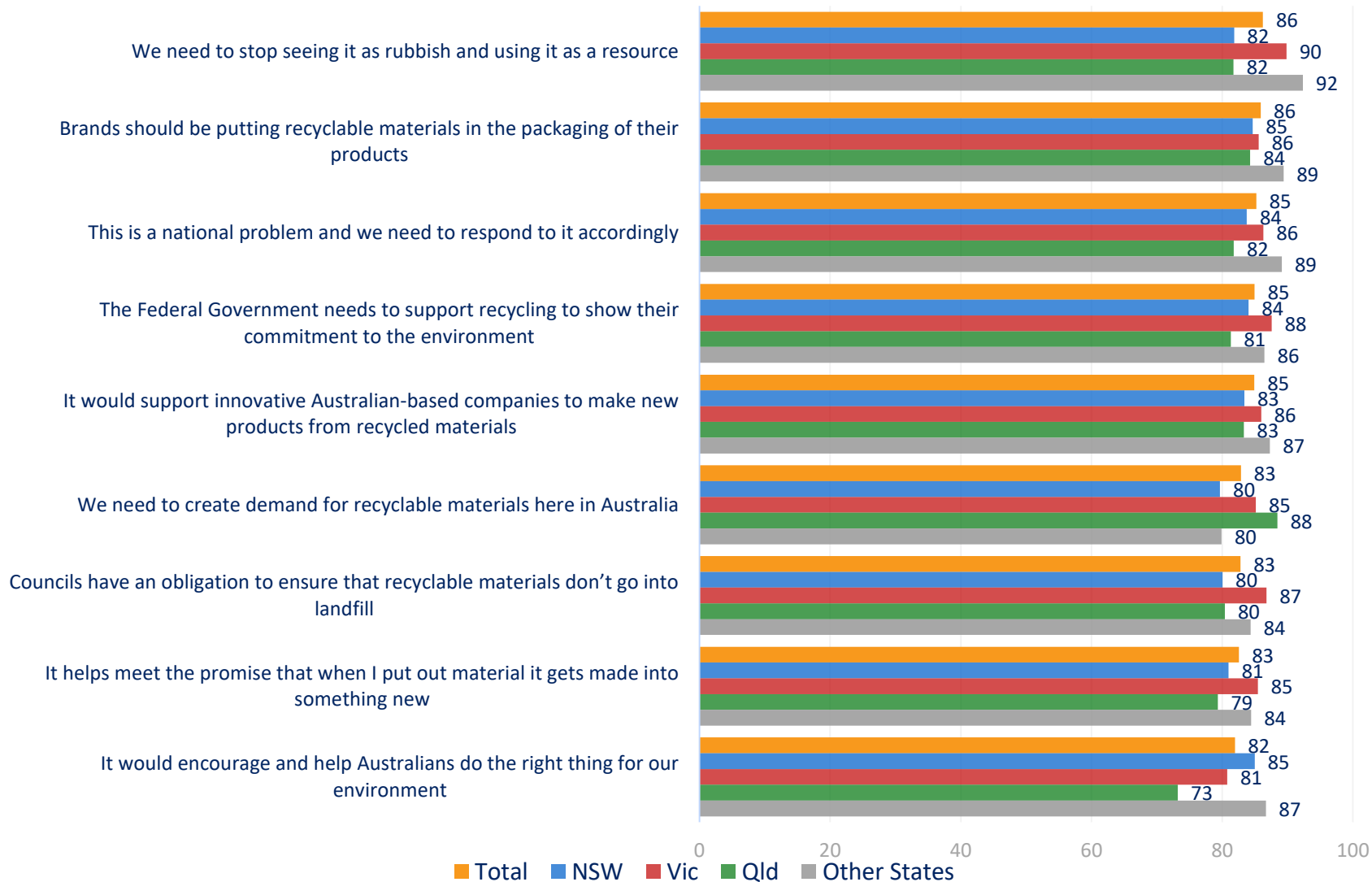
- The top reasons for supporting government action on recycling include ‘We need to stop seeing it as rubbish and start using it as a resource’ (+86% net agreement); ‘This is a national problem and we need to respond to it accordingly’ (+85%); ‘The Federal Government needs to support recycling to show 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%).

Here are some things other people have told us are good reasons 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 (1/2)



C|T GROUP

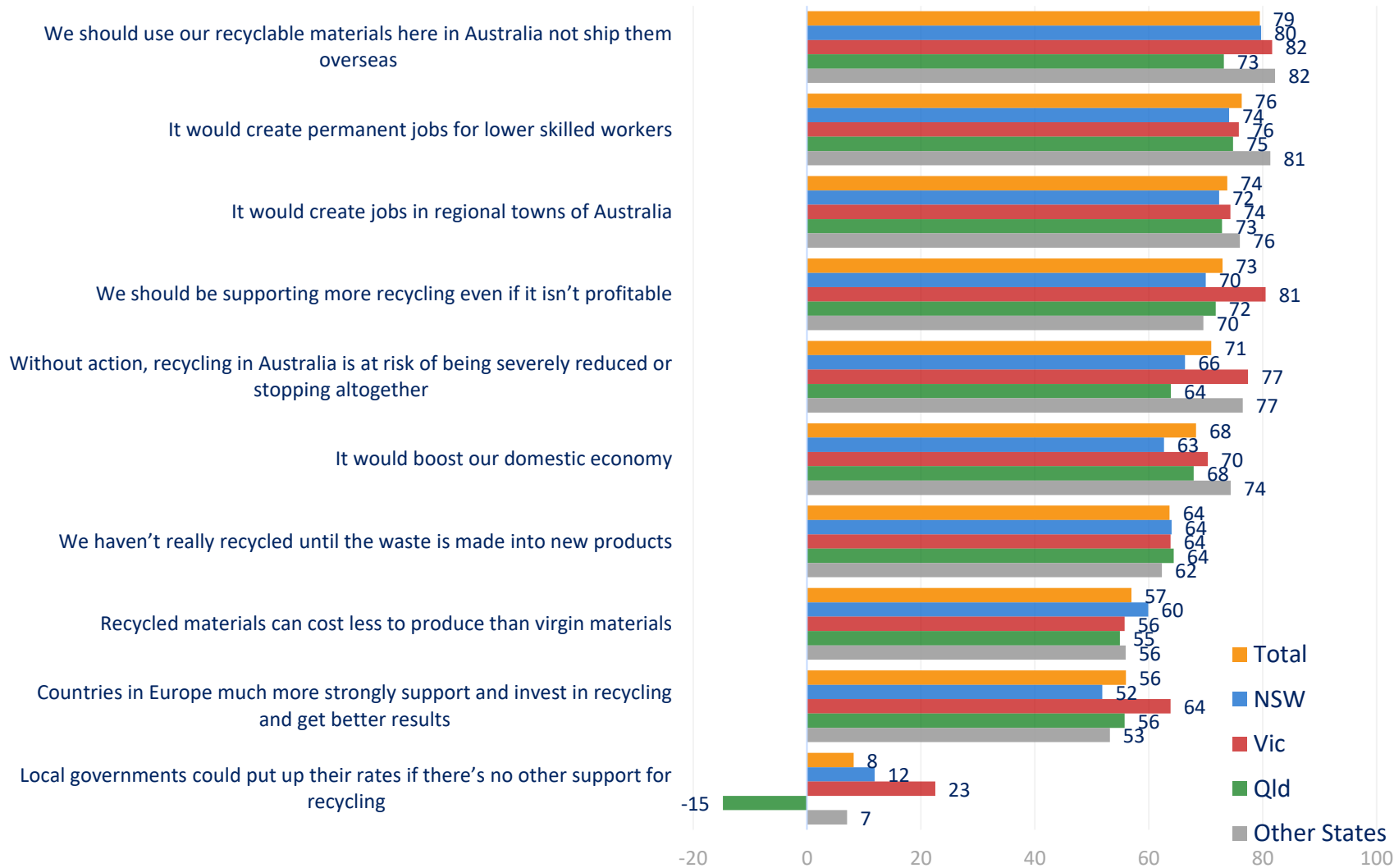


Here are some things other people have told us are good reasons for governments in Australia to act to create a more sustainable recycling industry. To what extent do you agree or disagree these are good reasons for more government action in relation to recycling?

Net credibility of messages – State (2/2)

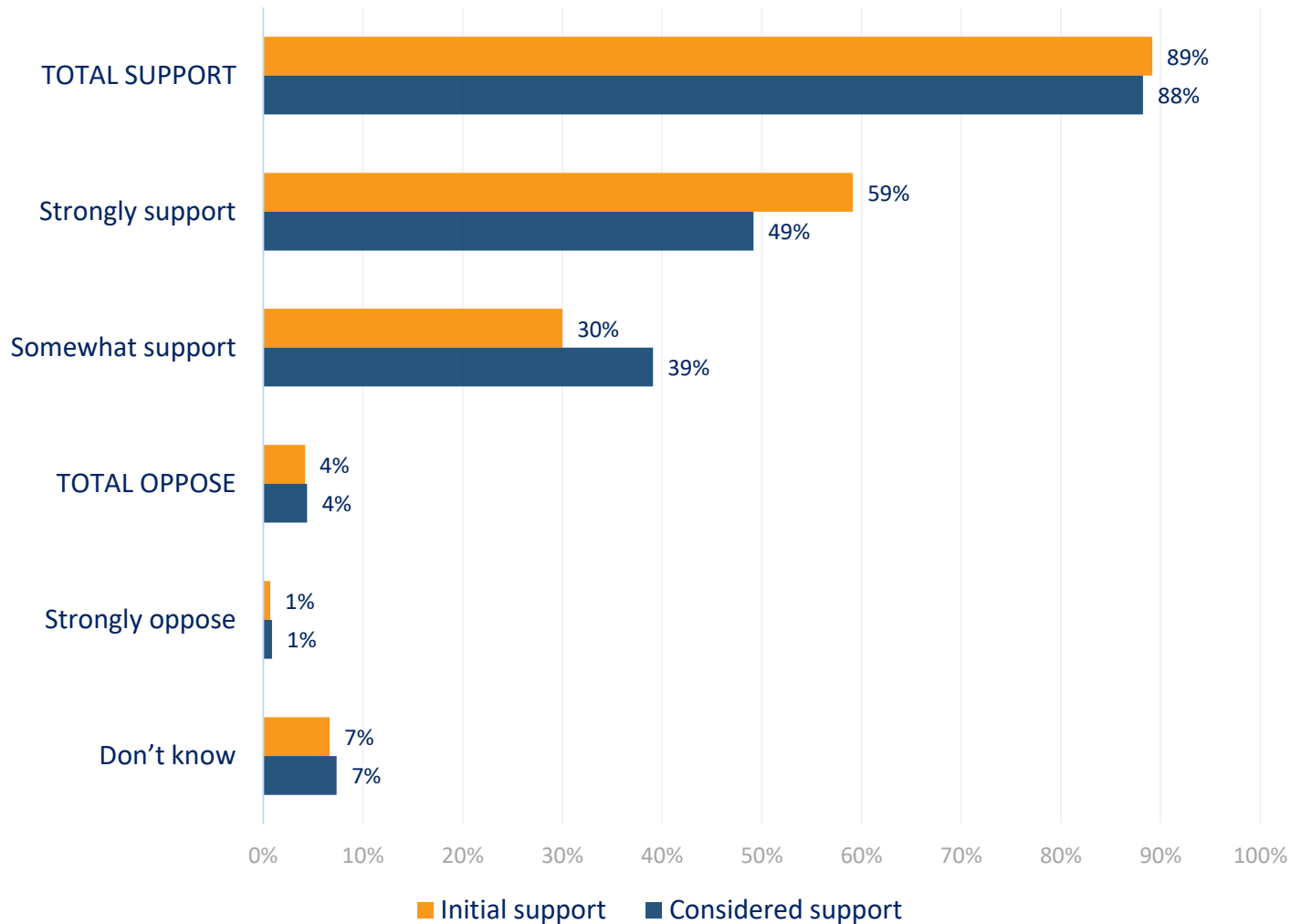


C|T GROUP



Here are some things other people have told us are good reasons 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



C|T GROUP

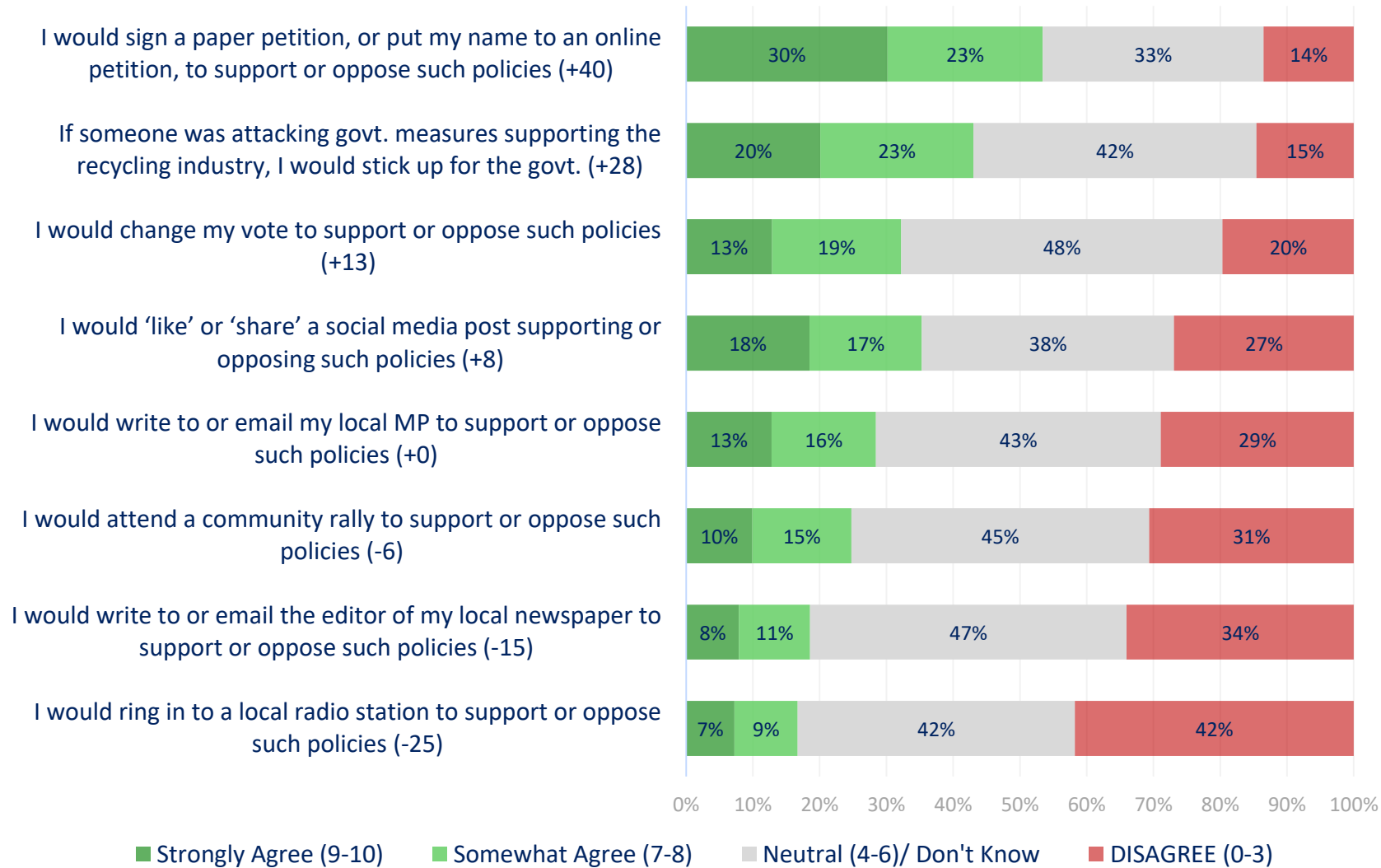
- **Total support eroded only 1% after the arguments for and against** due to apprehension of higher council rates, given the high cost of living concerns on the spontaneous issue agenda.

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



C|T GROUP



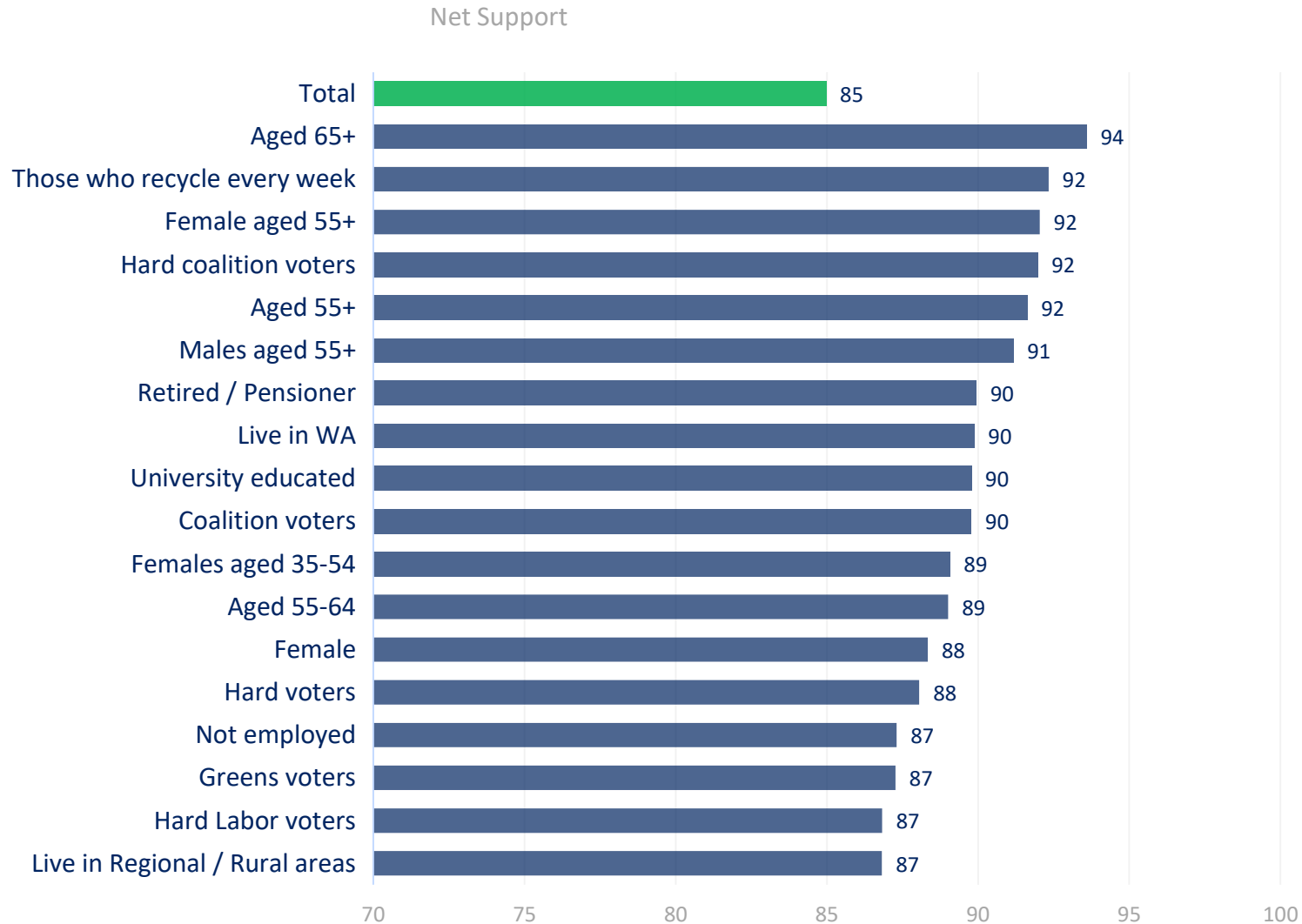
- Voters are willing to take action in support of government intervention
- 53% of voters said they would **sign a paper petition, or put their name to an online petition, in relation to these policies.**

Below is a list of actions 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 you would take that action, 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

Strong Support Groups

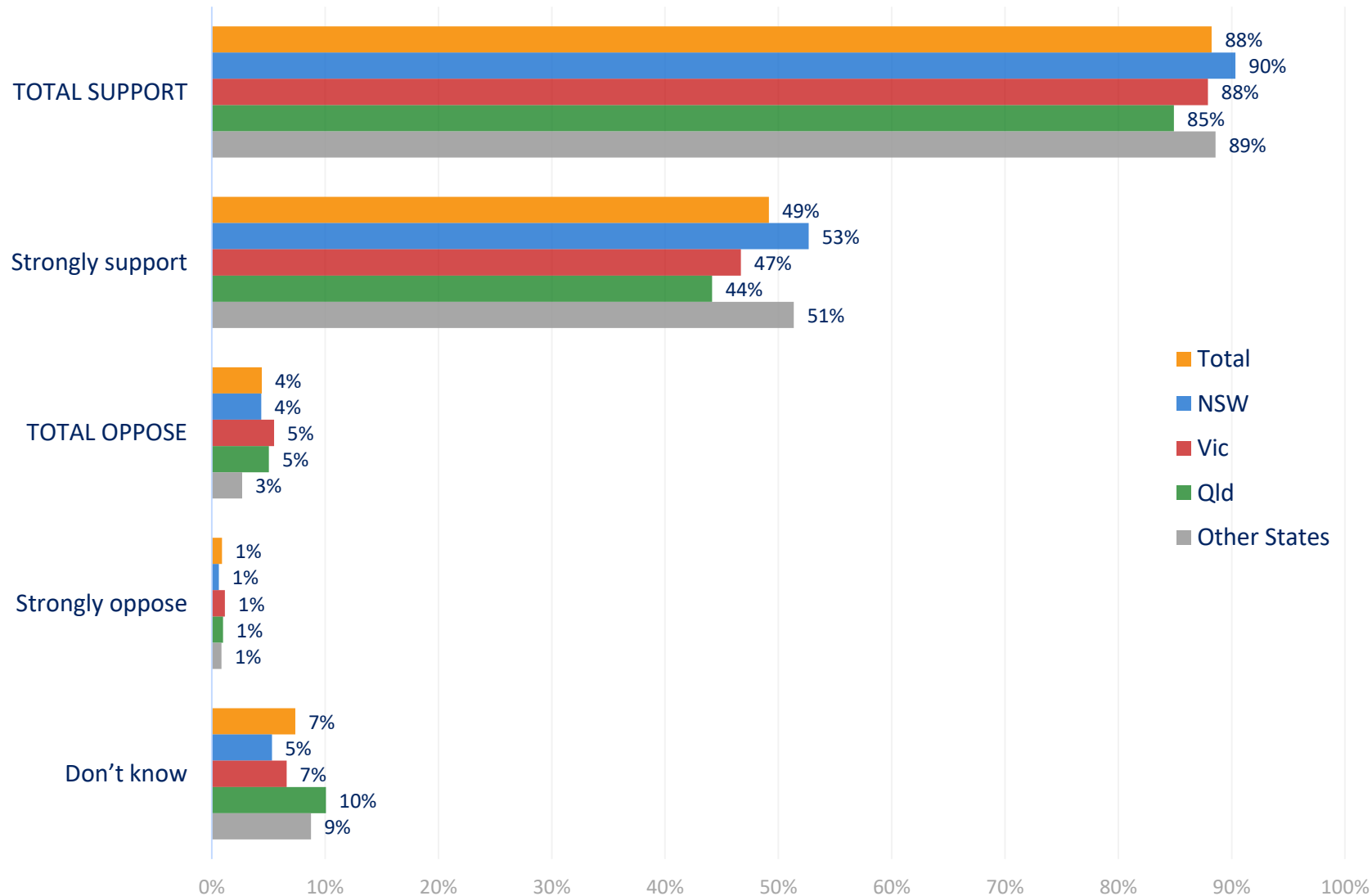


C|T GROUP



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?

Considered Support – State



C|T GROUP

- 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?