

Public Opinion Research Results Report

2022



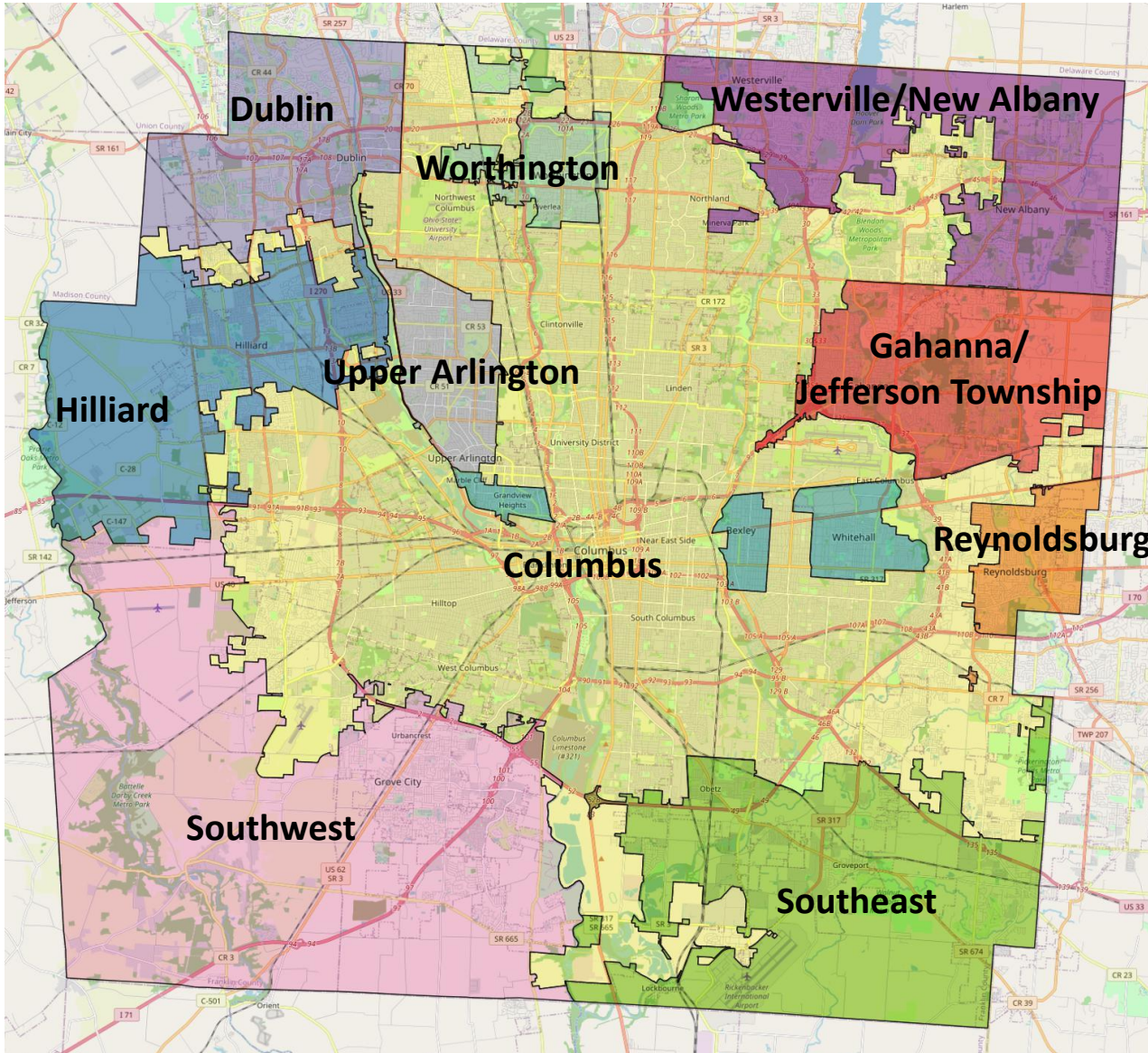
Methodology

- ▶ Mixed-mode live telephone and online survey of 18+ residents in the SWACO service area
 - Telephone interviews were conducted in English by trained, professional interviewers; landlines and mobile phones included
- ▶ Survey conducted February 3-13, 2022
- ▶ Effective overall n=618; overall margin of error ± 3.9 percentage points
- ▶ A total of 1,300 interviews were collected, with 700 collected in Non-Columbus areas of the SWACO service area to oversample key municipalities and townships of interest.
 - Details of the number of interviews collected in the various municipalities are shown on slides 4-5.
- ▶ Where applicable, results compared with the following:

Methodology	Dates	Universe	Sample Size	Margin of Error	EMC #
Phone	November 9-16, 2017	18+ Residents	600	± 4.0 percentage points	17-6559

Please note that due to rounding, some percentages may not add up to exactly 100%.

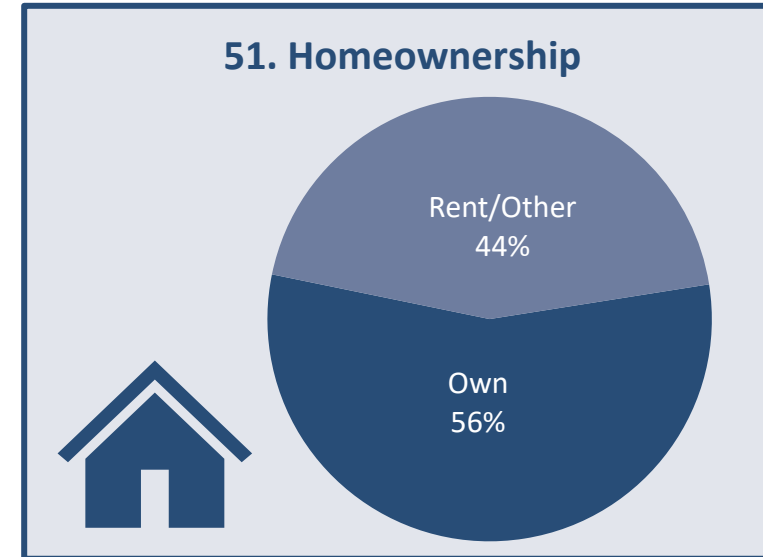
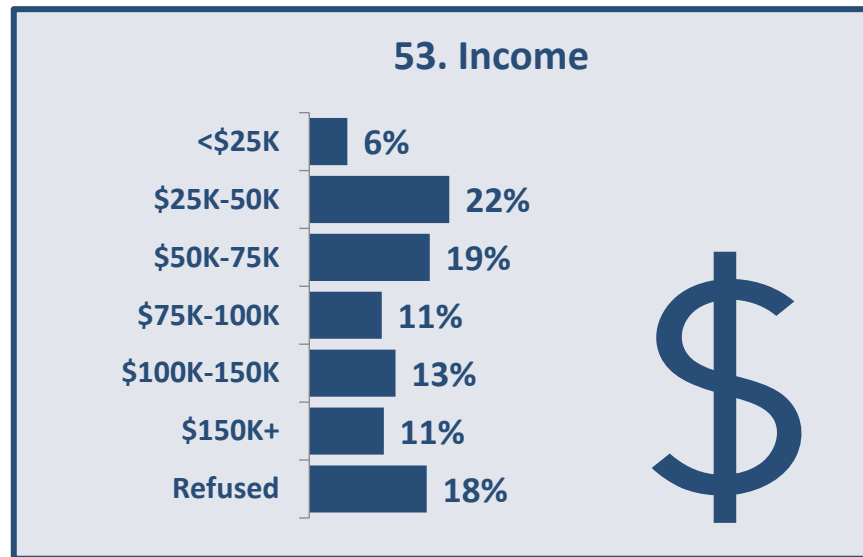
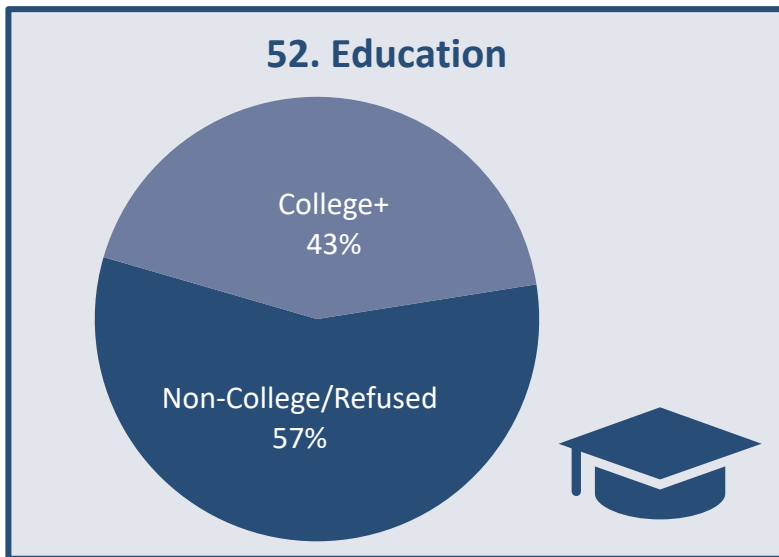
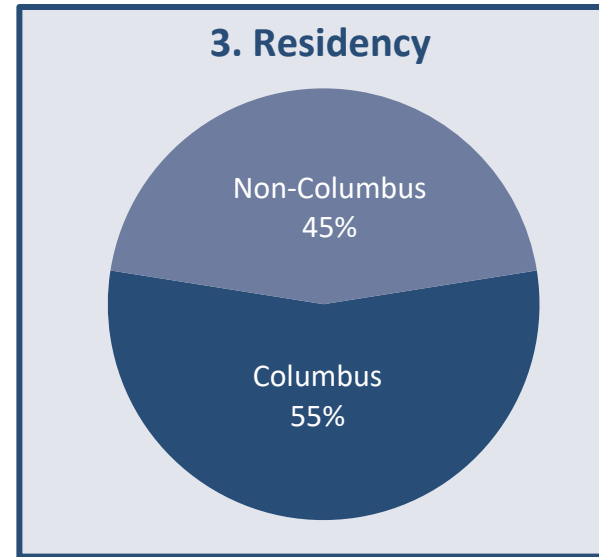
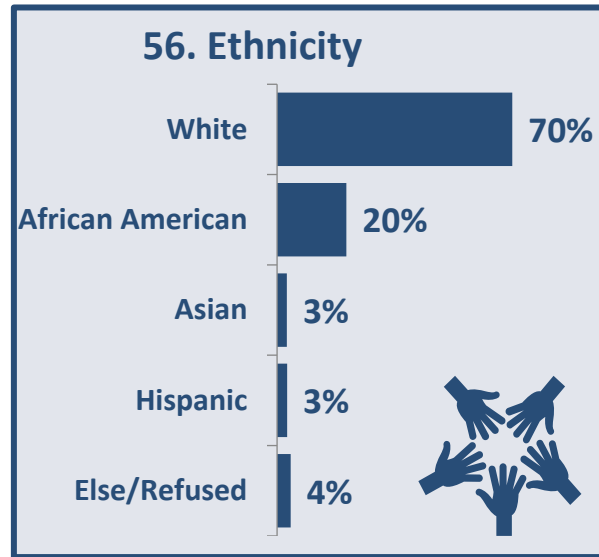
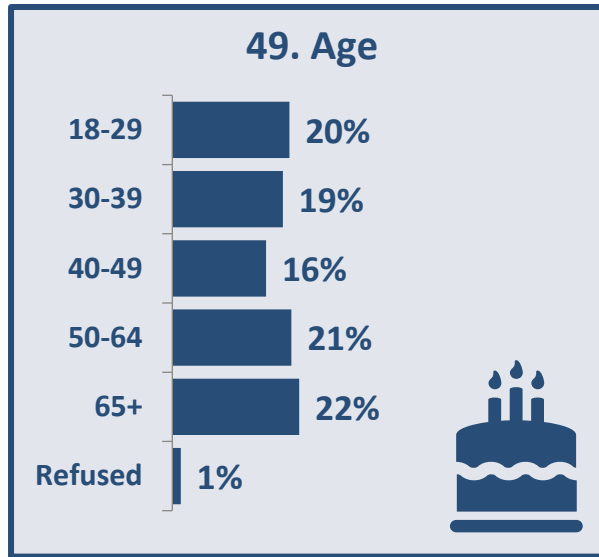
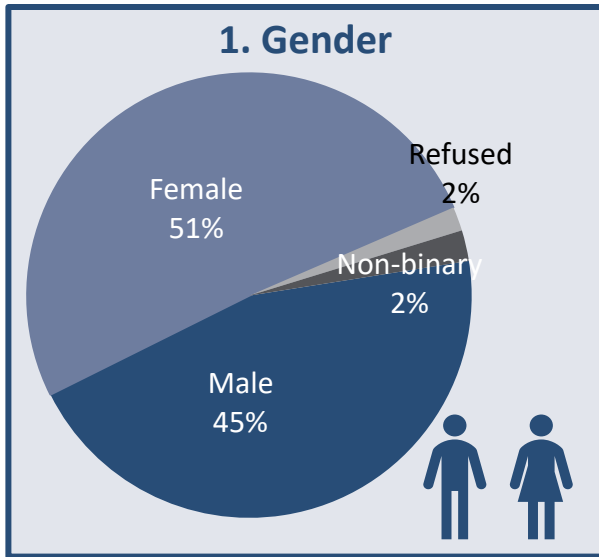
Region Map



Region	n	MoE
Columbus	407	± 4.86
Dublin	91	± 10.27
Gahanna/Jefferson Township	89	± 10.39
Upper Arlington	75	± 11.32
Hilliard	80	± 10.96
Reynoldsburg	75	± 11.32
Southeast	67	± 11.97
Southwest	159	± 7.77
Westerville/New Albany	132	± 8.53
Worthington	52	± 13.59

Please note, where margins of error are large data should be treated as directional rather than representative of that given population.

Profile of Survey Respondents

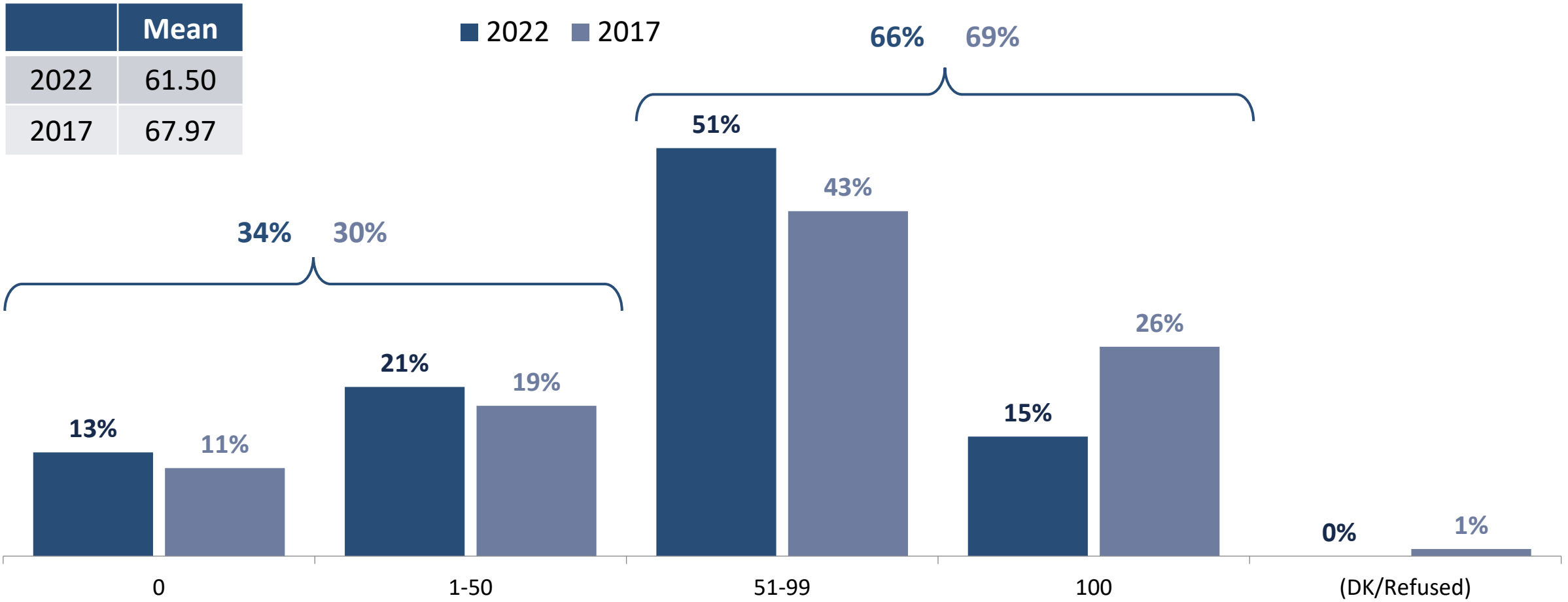


Key Findings

- ▶ SWACO's standing in the community is solid; half of residents are able to give an opinion of the organization, and of those the vast majority give SWACO a favorable rating.
 - Likewise, residents are overwhelmingly (89%) supportive of Central Ohio's 75% waste diversion goal, 92% agree that recycling reflects well on our community and 92% believe local government should be promoting recycling and composting.
- ▶ While access to recycling is nearly universal (94%) for those living in single family homes, less than half of residents living in multifamily housing (5+ units) report having access to recycling. Location was reported as the biggest barrier for these individuals to reduce waste.
- ▶ Residents are motivated to divert materials from the landfill because of the environmental and economic benefits. Yet, confusion about what to recycle persists with more than half of residents still incorrectly recycling clear plastic packages with lids, like those commonly used for produce.
- ▶ In addition, 78% of residents believe businesses should be required to offer recycling services to customers and 80% would like to see recycling and composting started (or improved) at their school or place of work.
- ▶ The majority (83%) of Central Ohioans are concerned about the amount of food wasted in our community and 78% support a curbside food waste collection program.

Recycling Behavior Scale

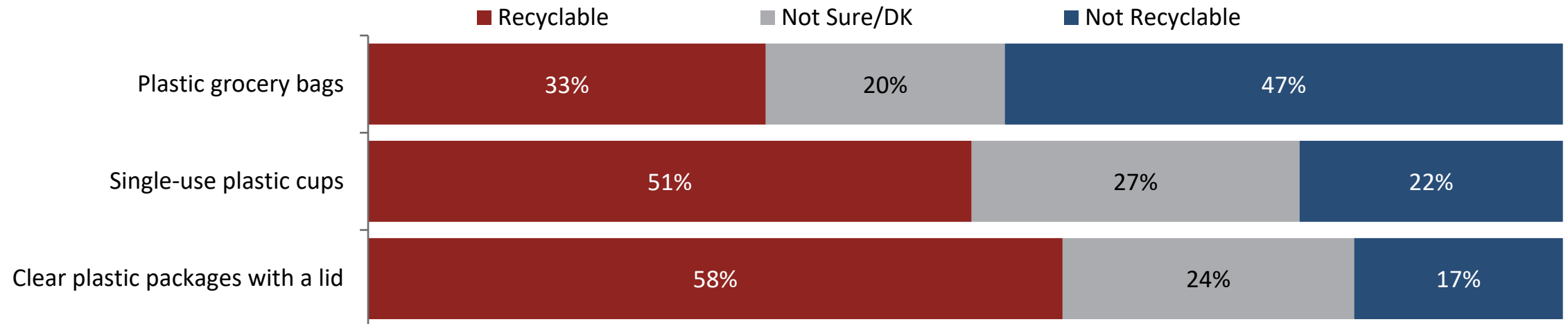
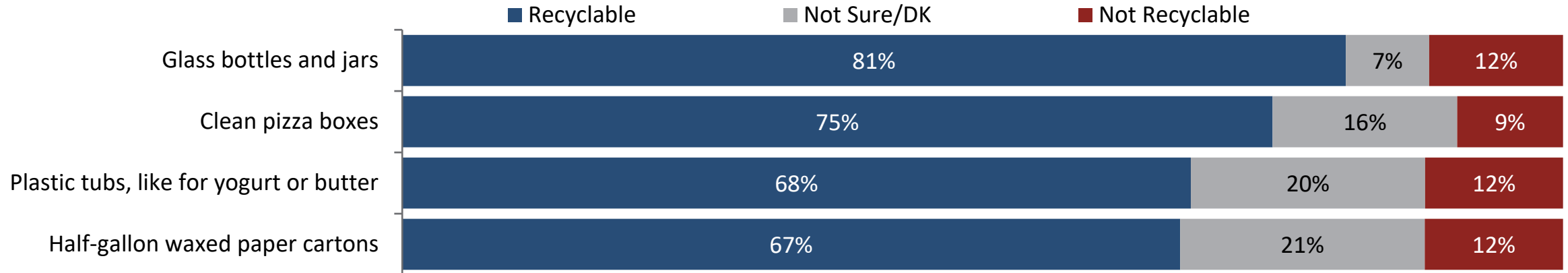
Self-reported household recycling is somewhat reduced since 2017, both in terms of intensity (those who respond 100) and the mean rating among all survey respondents. The share of those giving at least a 50 is relatively stable.



Q9. Thinking of the waste produced at home, please rate your household's recycling on a scale from 0 to 100, where 0 means your household never recycles, and 100 means your household makes extreme efforts to recycle everything they possibly can.

Is It Recyclable?

At least two-in-three residents correctly identify clean pizza boxes, waxed paper cartons, and glass bottles/jars as recyclable. More than half of residents incorrectly indicate that single-use clear plastic packages with a lid are recyclable.



Recycling Behavior Profiles

The share of residents classified as “consistent” recyclers has fallen since 2017, while the share of “Half-hearted” recyclers has increased.

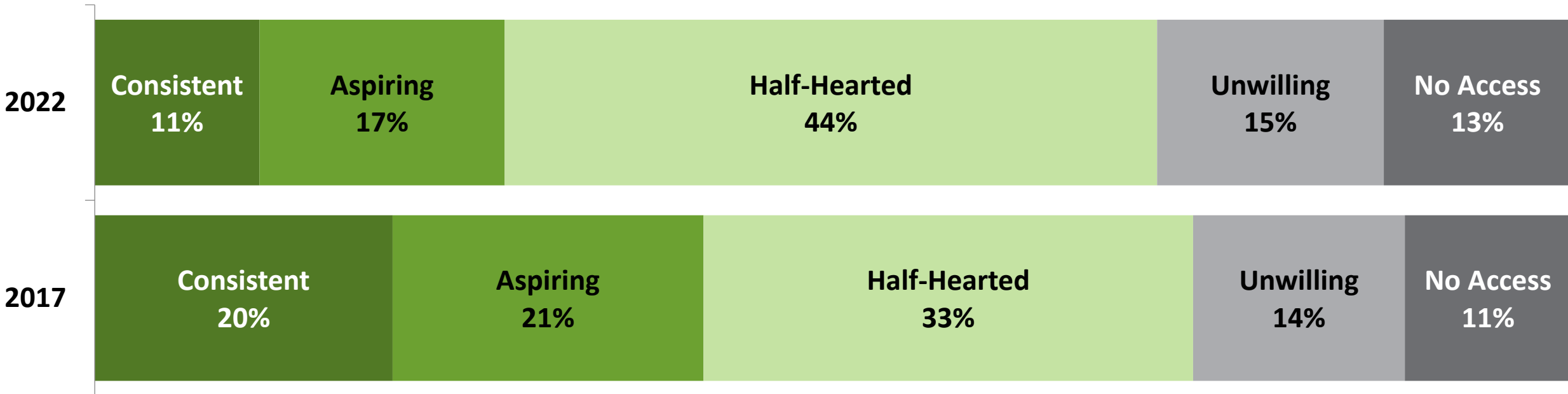
Consistent: Have home recycling access or use recycling drop off locations, rate household recycling behavior (on scale of 0-100) as 100, and either have correct recycling knowledge or actively take actions to reduce waste.

Aspiring: Have home recycling access or use recycling drop off locations and rate household recycling behavior as 90-100.

Half-Hearted: Have home recycling access or use recycling drop off locations and rate household recycling behavior as 50-89.

Unwilling: Have home recycling access or use recycling drop-off locations and rate household recycling behavior as 0-49.

No Access: No home recycling access and do not use recycling drop-off locations.



Reasons to Reduce Waste

Among those residents who report recycling behaviors in their households, more than half indicate that they reduce waste because it is good for the environment.

What are the main reasons you choose to reduce waste?	(n=538)
Good for the environment	55%
It's the right thing to do	11%
Reduce landfill waste	10%
For future generations	6%
Always recycle	6%
Reuse materials	4%
Reducing waste/Habit	3%
It's easy to do	2%
Save money	2%
Pushed by other parties	2%
To conserve resources	2%
Cleanliness	2%
To have more space	2%
Other	5%
Don't Know/None	2%
Refused	2%

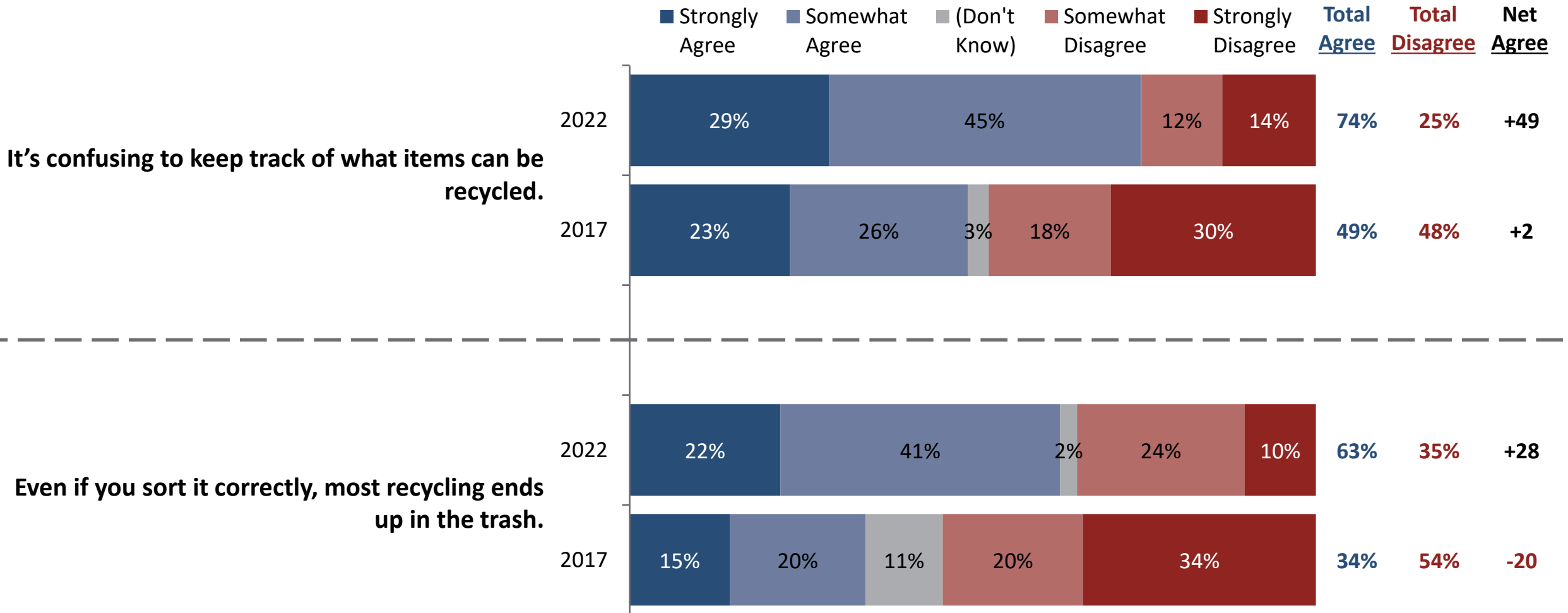
Barriers to Reducing Waste

Among residents living in single family homes, there is little consensus around the largest barriers, but a lack of knowledge about recycling rises to the top. One-in-four residents living in multi-family homes indicate that mobility/location is the biggest barrier to reducing waste.

What are some reasons that make it difficult for you to reduce waste?	Single-Family Home	Multi-Family Home/Other
Mobility/Location	6%	26%
Excessive packaging	10%	8%
Lack of space/container	8%	8%
Inconvenience/Lazy	7%	6%
Don't know what to do/what can be recycled	12%	5%
Plastic on everything	7%	5%
Time	4%	4%
Limitations on what can be recycled	9%	3%
Pick up is not often enough	7%	3%
Other people in household	5%	3%
Have to clean/sort it	3%	3%
Cost	1%	2%
Don't believe in it	0%	1%
Don't think about it/Forget	1%	0%
Not enough waste to be worth it	2%	0%
Other	7%	10%
Don't Know/None	22%	22%
Refused	3%	2%

Barriers to Waste Reduction

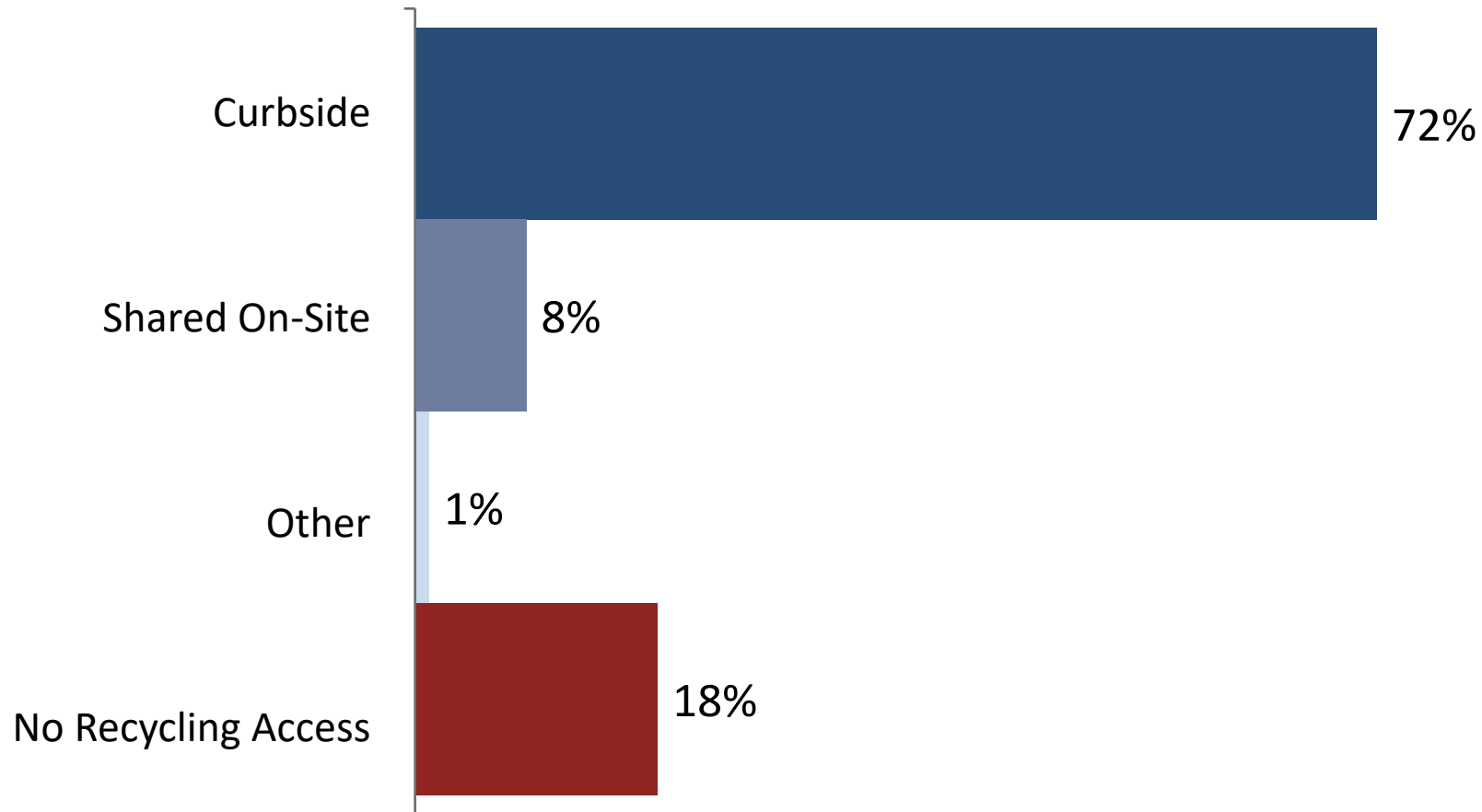
Three-in-four Central Ohio residents agree that it is confusing to keep track of what can and cannot be recycled, an increase from just half of residents in 2017 - likely the result of program changes in 2021 and 2022.



Q19-32. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Recycling Access

Around three-in-four residents indicate that they have curbside access. For those living in large apartment complexes, only one in two reported having access to a recycling program.

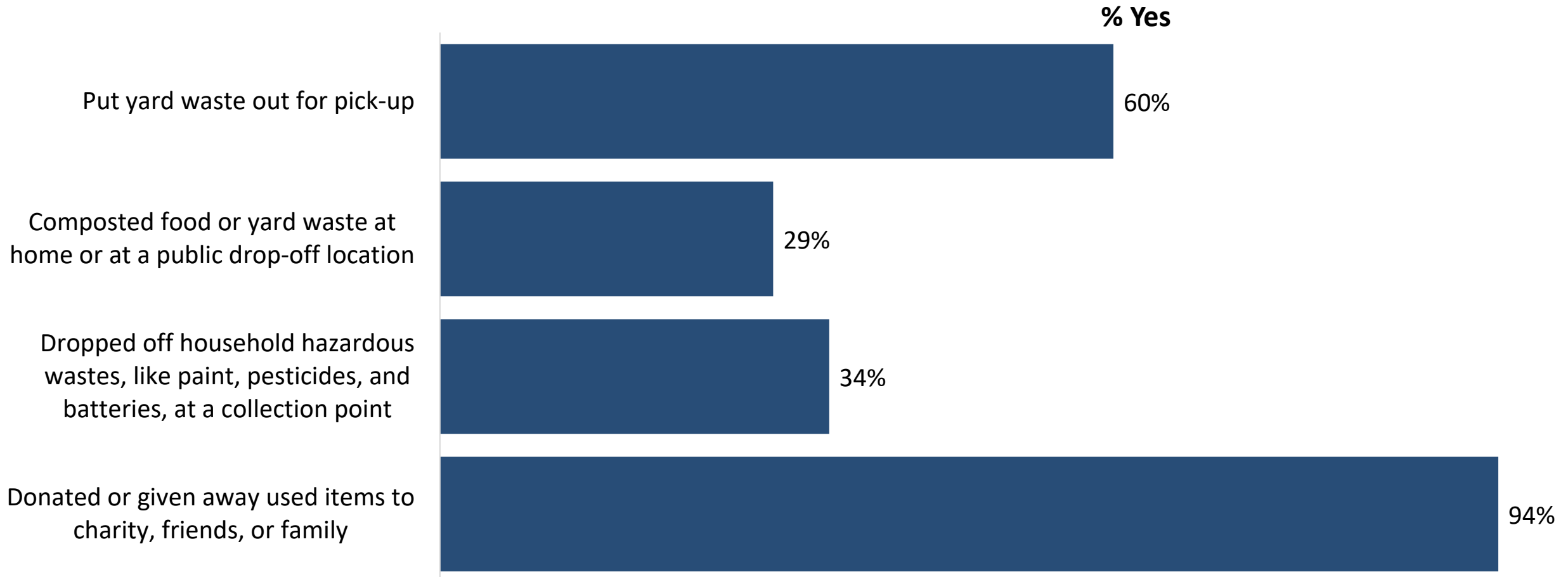


Q5. At your current home, do you have curbside or alley recycling pick-up, a shared on-site recycling drop-off location on the property, or do you have no recycling service located at your home?

Other Re-Use/Waste Behaviors

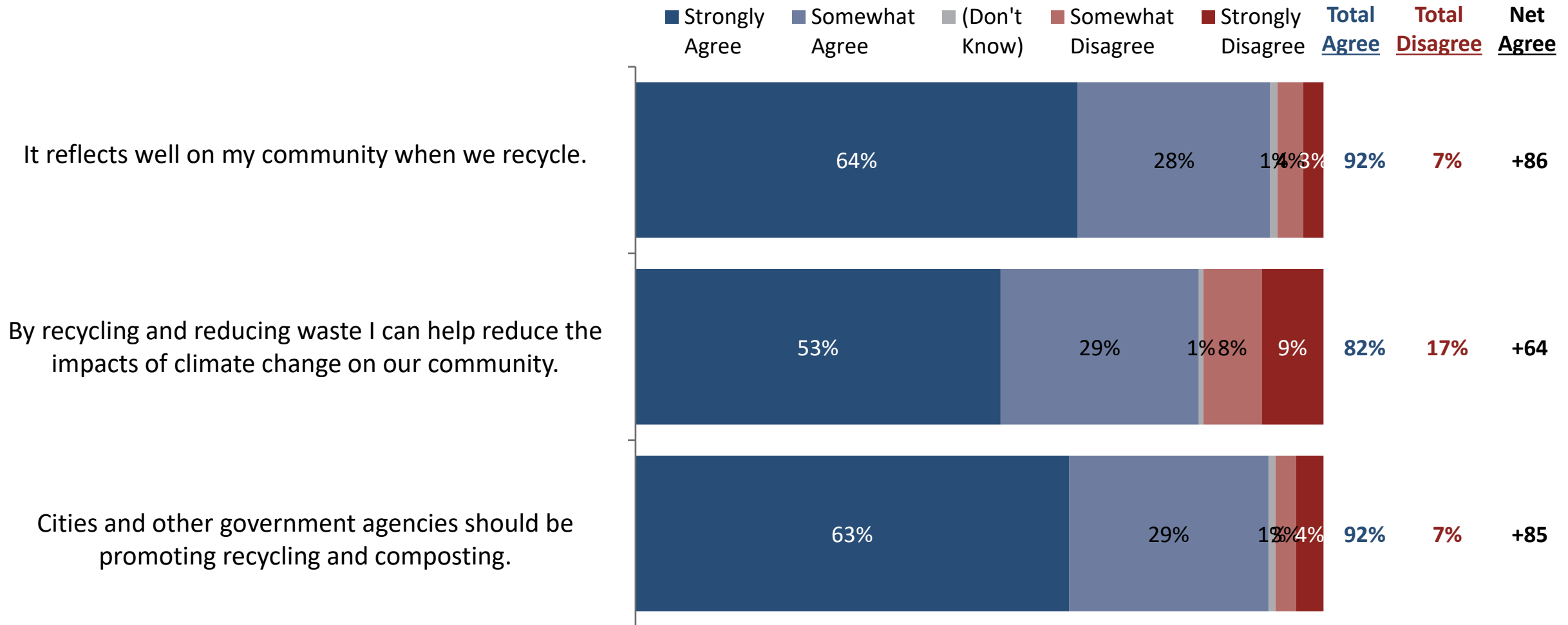
Almost all respondents have donated or given away used items in the past year, and six-in-ten say that they have put yard waste out for pick-up.

Please tell me whether you have done each of the following in the past year.



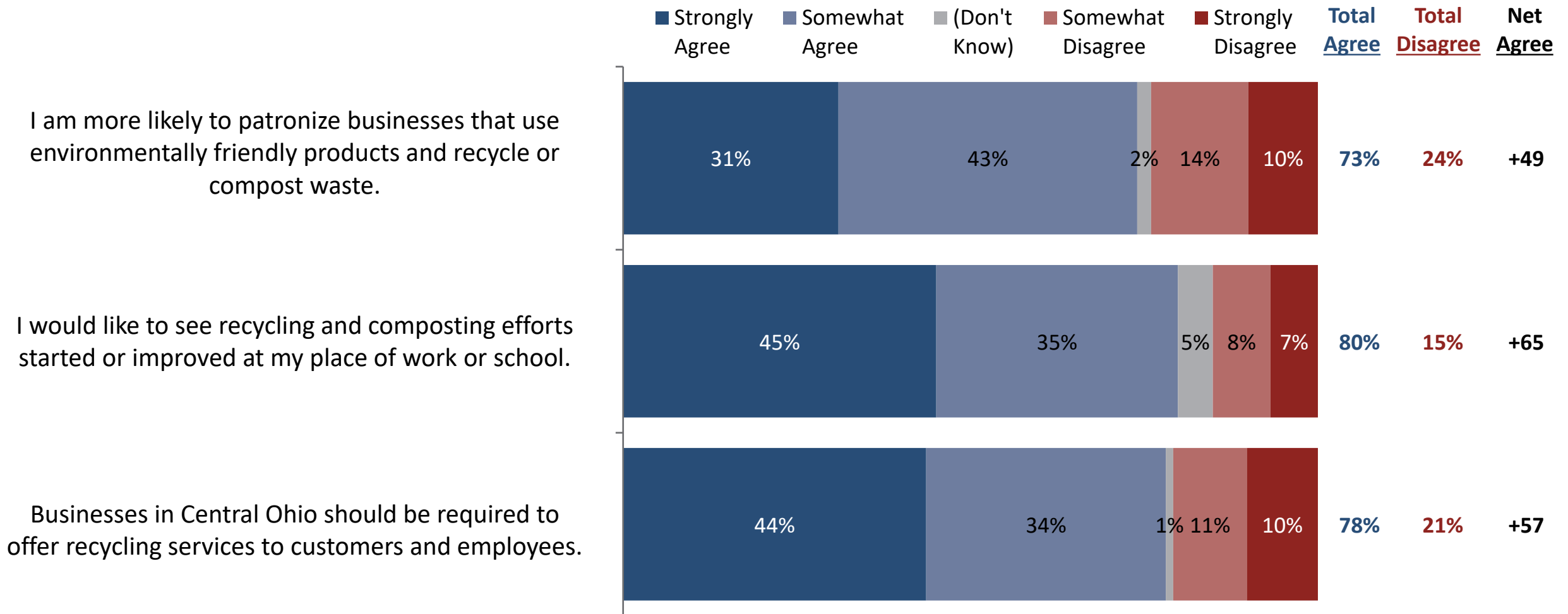
Waste Reduction Attitudes

A vast majority of residents agree that recycling reflects well on their community, that recycling can help reduce the impacts of climate change, and that cities and government agencies should promote recycling.



Waste Reduction Attitudes

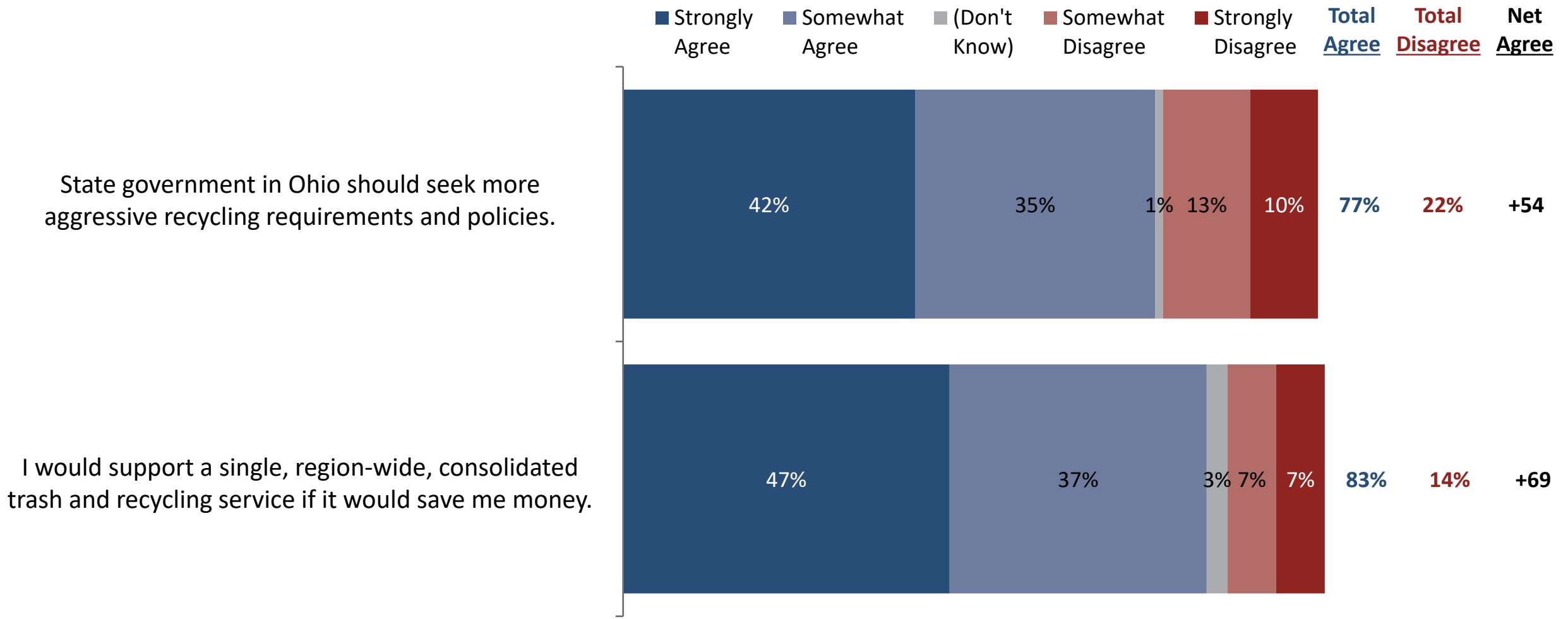
Over seven-in-ten indicate that they are more likely to patronize environmentally-friendly businesses. Around eight-in-ten agree they would like to see more recycling at their work/school and that businesses should be required to offer recycling.



Q19-32. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Waste Reduction Attitudes

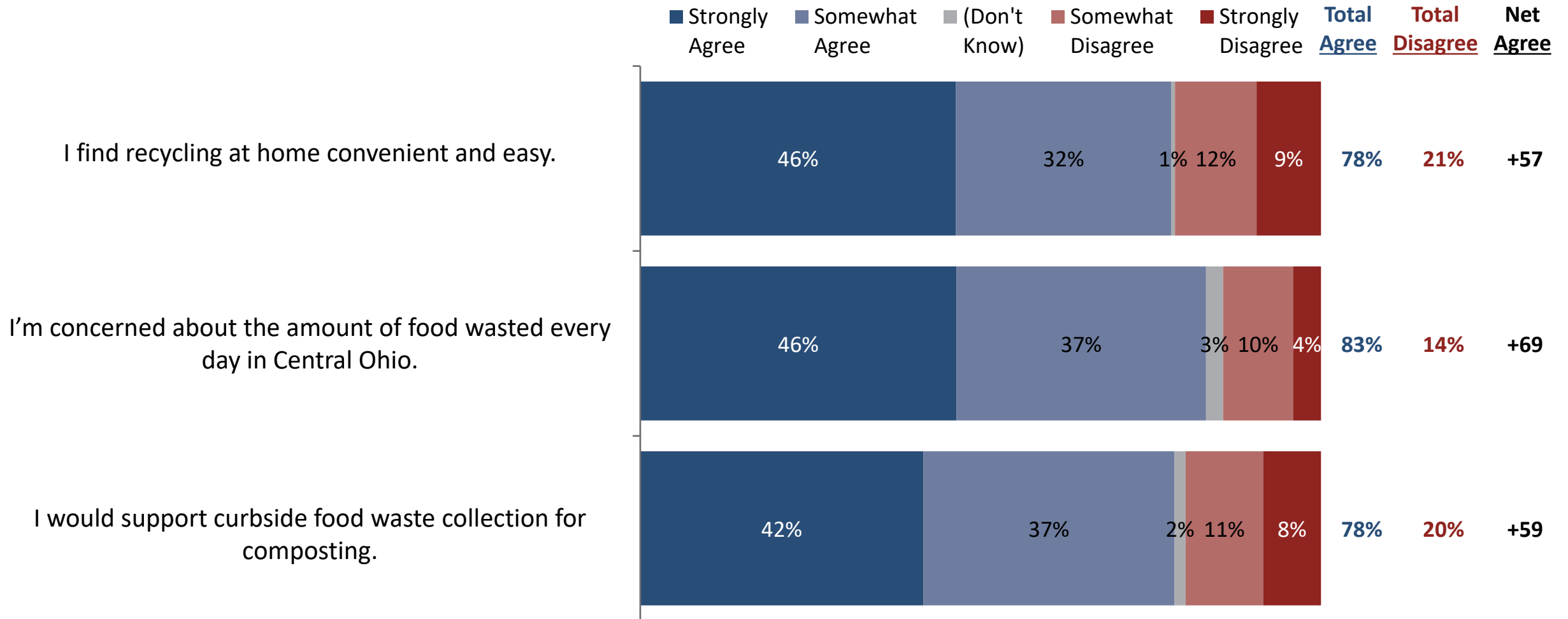
More than three-in-four respondents say that state government in Ohio should be more aggressive on recycling, and over eight-in-ten would support a consolidated trash and recycling service.



Q19-32. Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Waste Reduction Attitudes

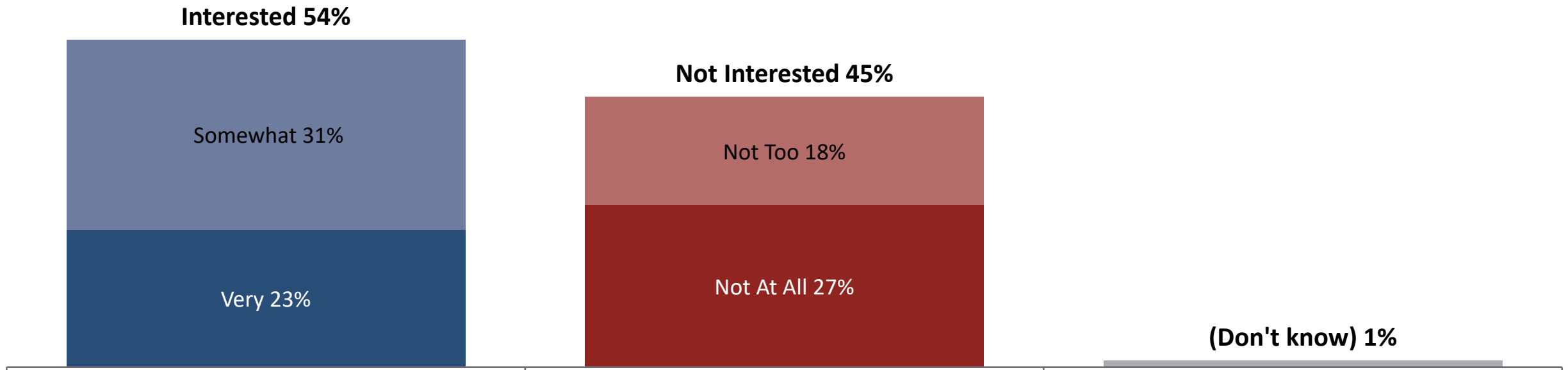
Large shares of residents also agree that recycling at home is convenient and easy, that they are concerned about food waste, and that they would support curbside food waste collection services.



Interest in Use-Based Trash Fee

Central Ohio residents are split in their interest in a use-based garbage collection fee, with just over half indicating at least some interest in such a program.

Some cities encourage waste reduction by charging for trash like other utilities, where the less you use, the less you pay. Would you be interested in a program where you pay less for a smaller trash container, and more for a larger trash container, and the amount you can recycle is unlimited?

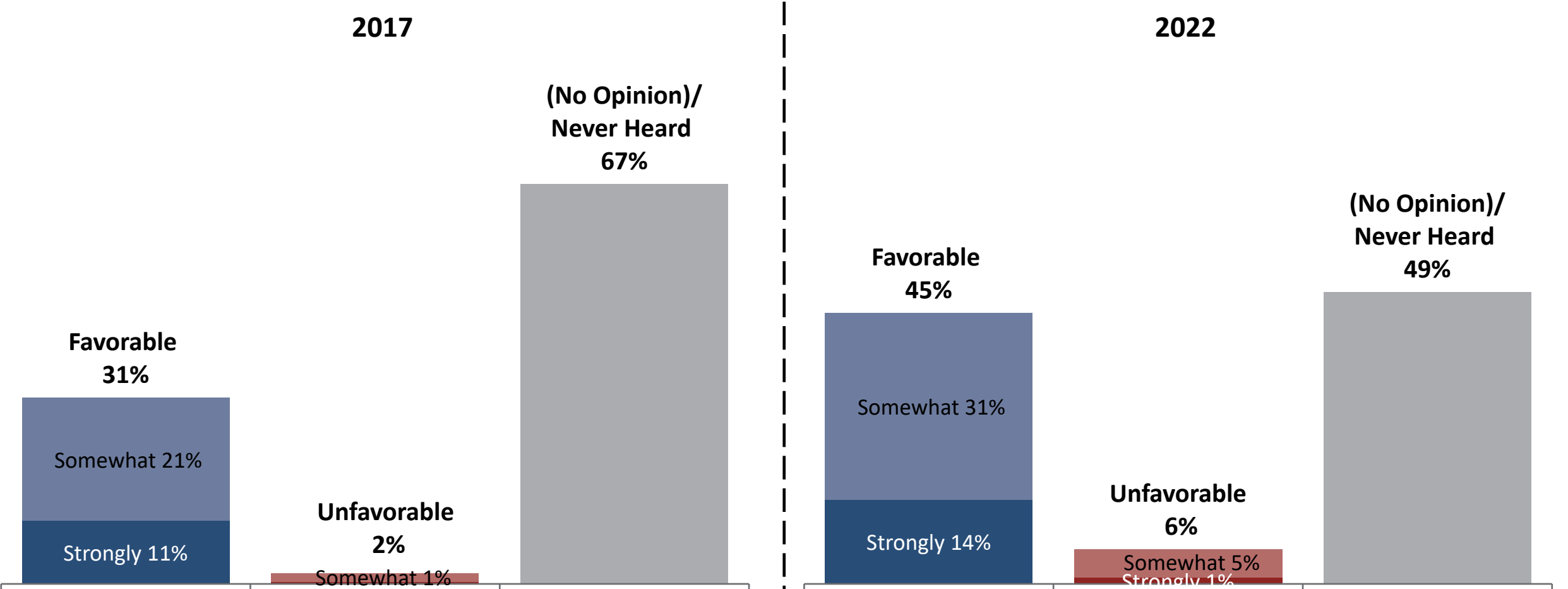


SWACO Waste Reduction and Diversion Programs

- ▶ Commercial Waste Policy and Business Resources Development
- ▶ Recycling Access for Multifamily Apartments
- ▶ Continuation and Expansion of Recycle Right Campaign
- ▶ Food Waste Initiative and Composting Infrastructure Implementation
- ▶ Supporting Community Sustainability Initiatives

SWACO Favorable Rating

Nearly half of residents hold a favorable opinion of SWACO, though that rating lacks intensity. Less than half of residents reported having never heard of the organization – an 18% improvement over the last 5 years.

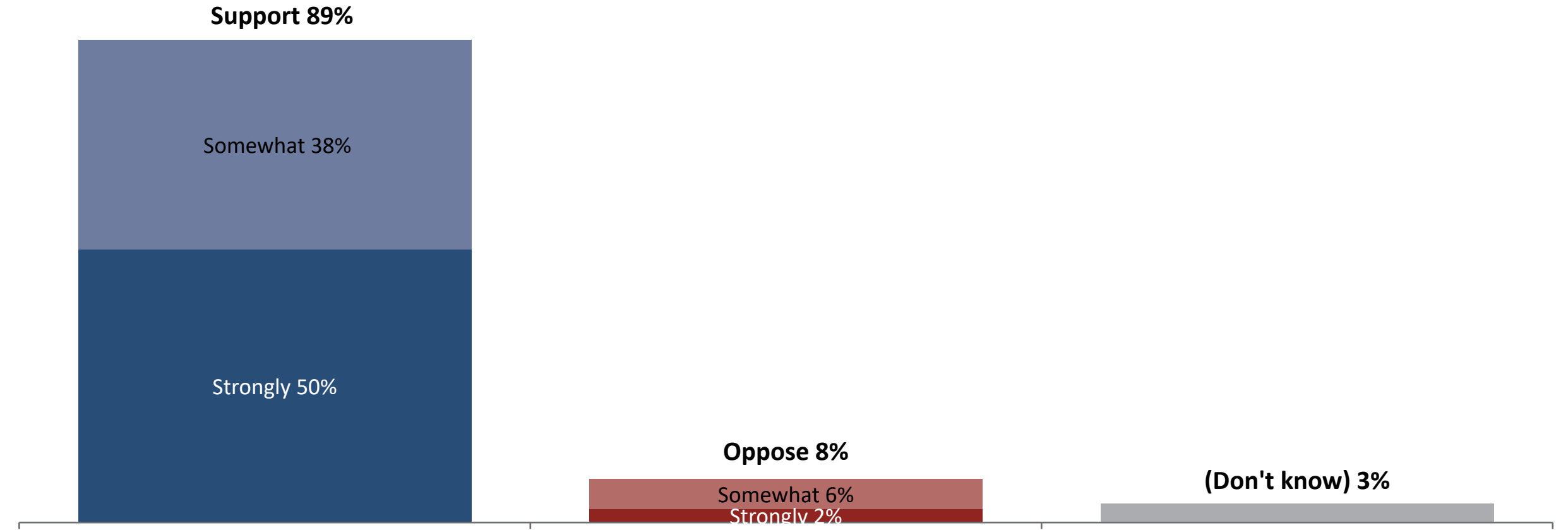


Q18. Do you have a strongly favorable, somewhat favorable, somewhat unfavorable or strongly unfavorable opinion of SWACO, the Solid Waste Authority of Central Ohio? If you have never heard of SWACO please just say so.

Support for Waste Diversion Goal

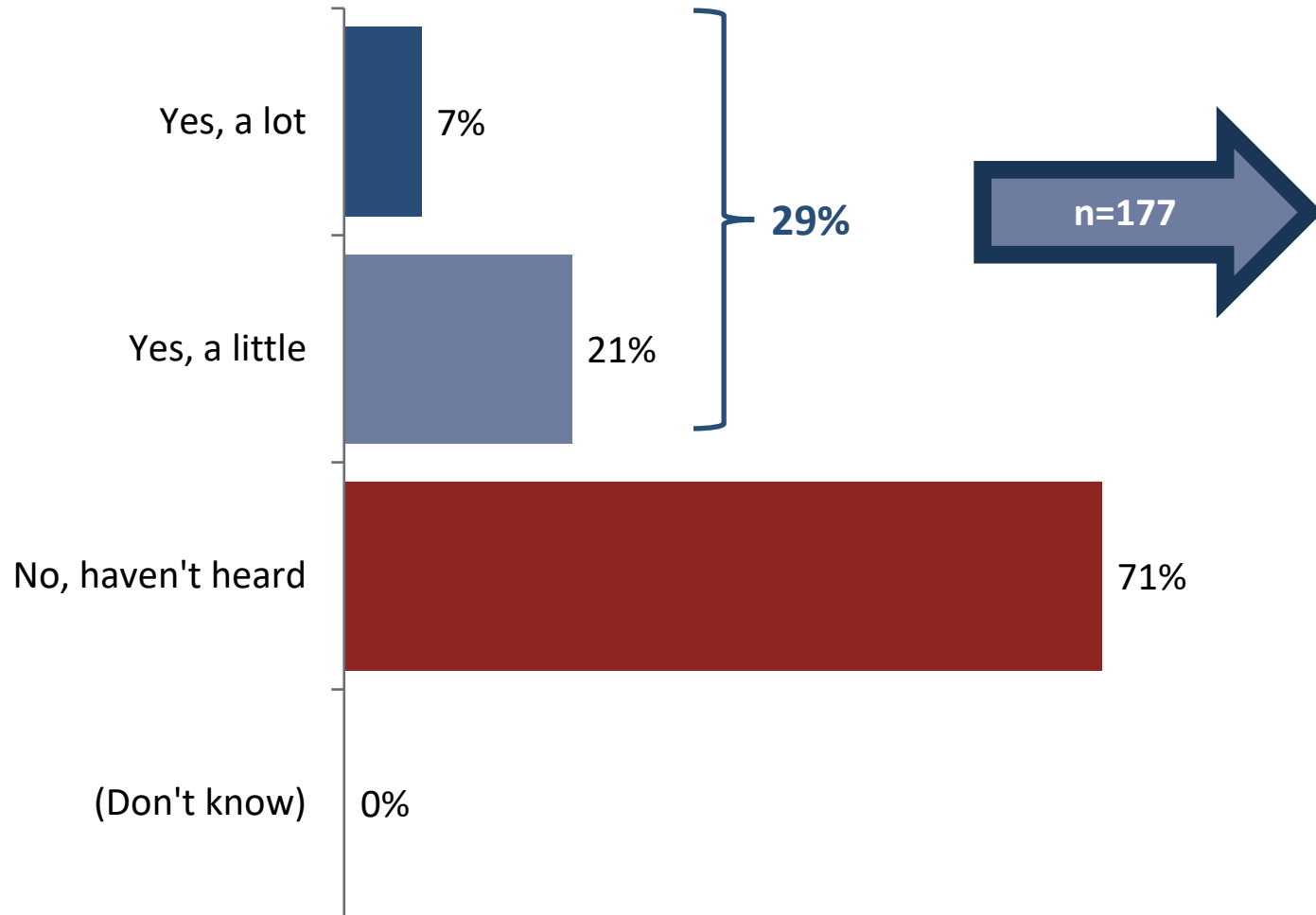
There is widespread support for SWACO's waste diversion goal, with nearly nine-in-ten residents indicating support and half indicating strong support.

Franklin County currently diverts nearly half of all waste produced in the county, but SWACO's long term plan calls for a goal of 75% waste diversion by 2032. Do you support or oppose that goal?



Waste Reduction Outreach Awareness

Just under three-in-ten residents recall recently hearing or seeing about recycling and waste reduction. Of that group, two-in-five recall encountering that information on TV, with one-in-five finding that information via mailer and online.



Q11. Where did you recently see or hear about recycling and waste reduction?	%
Mailer sent to my house	18%
On TV	40%
Visited a website online	18%
On the radio	11%
Somewhere else	12%
Don't Know	1%

Messaging to Promote Waste Reduction

Various messaging themes promoting waste reduction are convincing to three-in-four residents of Central Ohio. Themes that reference protecting the environment and supporting local jobs are rated with the highest intensity.

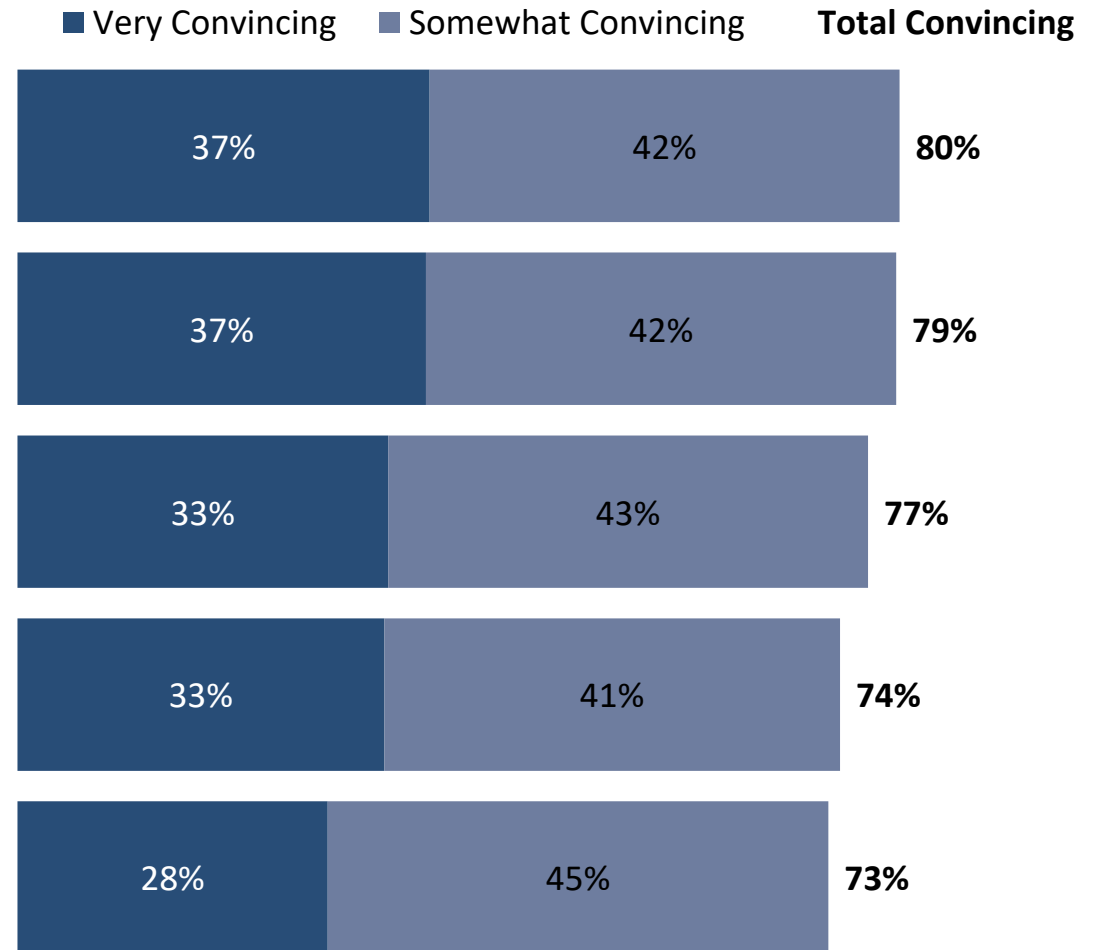
By taking just a few minutes to recycle right at home, you help to reduce pollution, contribute to clean water, conserve limited natural resources and reduce Central Ohio's reliance on landfills.

The benefits of recycling go beyond protecting the environment – when you recycle right you strengthen the local economy too. In Central Ohio, recycling supports nearly 400 businesses, creates more than 5,000 jobs, and contributes over a billion dollars in annual revenue to our economy.

Every year, Central Ohio residents and businesses throw sixty-eight million dollars' worth of recyclable materials away. By improving our recycling practices, we would be putting these resources to work in the economy instead of wasting them.

60% of the recyclable material used in Franklin County homes gets thrown in the trash instead of being recycled. When we all know how to recycle right, we can make a difference.

Central Ohio's rate of recycling exceeds the national average yet 75% of the materials landfilled in our community every year could have been diverted through reuse, recycling and composting. The opportunity exists to recycle more.



Q42-47. Next I'd like to read you statements from people who want Central Ohio residents to recycle more. After you hear each statement, please tell me how convincing it is as a reason to reduce waste and recycle more.

Conclusions and Recommendations

- ▶ SWACO has become more well known and highly regarded over the past 5 years.
- ▶ As such, there is a strong desire for SWACO (and partners) to continue to lead Central Ohio's efforts on waste reduction, recycling and composting.
- ▶ While likely attributable to the expansion of the list of items accepted in the curbside recycling program over the last two years, confusion remains about what to recycle and is an opportunity for continued education.
 - Educational Tactics: TV had the strongest recall among residents followed by mailers and websites. Environmental and local job messages are compelling.
- ▶ Location (or lack of on site recycling) is the biggest barrier for individuals living in apartments and condos to reduce their waste.
- ▶ Residents continue to express concern about food wasted in our community and strongly support a curbside collection program.
- ▶ There's a strong desire for schools and businesses to offer recycling and composting.
- ▶ Slightly more than half of residents expressed interest in a volume-based system (similar to the city of Whitehall's program which has helped to double-recycling rates).



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