

Multi-Family Recycling and Food & Yard Waste Survey

Final Report

Prepared for The City of Calgary by:

Contact:

Erin Roulston
Vice President
Ipsos
403-919-5609
erin.roulston@ipsos.com
700 6th Ave SW, Suite 1950
Calgary, AB T2P 0T8

Jessica Weber
Account Manager
Ipsos
403-612-7353
Jessica.weber@ipsos.com
700 6th Ave SW, Suite 1950
Calgary, AB T2P 0T8



Table of Contents

03

Background and Methodology

07

Key Findings

13

Multi-Family Recycling Programs

27

Multi-Family Food and Yard Waste Programs

44

Multi-Family Waste Diversion Communications

48

Attitudes Towards Waste Reduction

54

Key Driver Analysis: Factors Influencing the Frequency of Waste Diversion

58


Demographics



Background and Methodology




Project Background

 In February 2014, Council approved the strategy that requires multi-family housing such as apartments, condos, and townhouses to have on-site recycling service by 2016. In November 2016, Council approved an amendment to the Waste and Recycling Bylaw that requires multi-family complexes to divert food and yard waste, starting in November of 2017.

 Thus, The City of Calgary's Waste & Recycling Services (WRS) business unit wished to conduct telephone survey research with multi-family residents in a series of five waves:

- Wave 1 (January 2015) – Prior to the launch of a multi-family recycling communication campaign.
- Wave 2 (July 2015) – Mid-way through the multi-family recycling communication campaign.
- Wave 3 (February 2016) – Just after the deadline for multi-family recycling implementation.
- Wave 4 (November 2016) – After the multi-family recycling program has been in place for several months and just after approval of the multi-family food and yard waste program.
- Wave 5 (November 2017) – Just after the deadline for multi-family food and yard waste diversion implementation.

 Wave 6, the current measure (October 2019), provides an update on previous waves, and an assessment of attitudes nearly two years after the introduction of multi-family food and yard waste collection.

Project Objectives



Key objectives for the Wave 6 research include assessing:

- Current recycling behaviours and barriers;
- The incidence of multi-family complexes providing on-site recycling services;
- Satisfaction with multi-family recycling programs;
- Motivators to increase the incidence/frequency of recycling;
- Support for, and perceptions of, the multi-family recycling program;
- Current food and yard waste diversion behaviours and barriers;
- The incidence of multi-family complexes providing on-site composting programs/services;
- Acceptable items for food and yard waste diversion programs;
- Awareness of and satisfaction with multi-family food and yard waste programs;
- Motivators to increase the incidence/frequency of composting;
- Support for multi-family food and yard waste programs;
- Communications about multi-family recycling and composting; and,
- Attitudes regarding waste diversion.



The Wave 6 research collects data which is tracked against Waves 1, 2, 3, 4 and 5, where possible.



Ipsos conducted a telephone survey with 500 residents of Calgary aged 18 years or older currently living in multi-family complexes.

- Both landline (60%) and cell phone (40%) sample were used.
- Interviews were conducted between September 24 and October 1, 2019.
- The average interview length was 17 minutes.



The final data were weighted to ensure the overall sample's quadrant and age/gender composition reflects that of the actual Calgary population aged 18 or older living in multi-family complexes.



With a sample of 500, results are considered accurate to within ± 4.4 percentage points, 19 times out of 20, of what they would have been had the entire population of adult multi-family residents in Calgary been surveyed.

- The margin of error is larger within quadrants and for other sub-groupings of the survey population.



Where possible, results are compared to previous waves of the survey.

- ↑ indicates number is significantly higher than 2017 (Wave 5)
- ↓ indicates number is significantly lower than 2017 (Wave 5)

NOTE: In the midst of fieldwork for this survey, there was a national media report about some Canadian plastics recycling being sent to a landfill or incinerator. This may be reflected in some respondent comments.

<https://www.cbc.ca/news/technology/marketplace-recycling-trackers-b-c-blue-box-1.5299176>



Key Findings



Highlights: Multi-Family Recycling Collection Program

Multi-family recycling programs are now quite established. While support for recycling programs and satisfaction with on-site recycling services are strong, there are opportunities to increase compliance with providing facilities and to encourage individual residents to recycle a greater proportion of qualifying materials.

Support and satisfaction for recycling are high

Virtually all (96%) residents of multi-family housing support the recycling program, the highest level of support recorded to date.

Satisfaction with multi-family recycling programs in Calgary is also high. At 88%, it is on a par with the measure in 2017.

Compliance remains stable and frequency of recycling has increased

As was the case two years ago, eight-in-ten multi-family residents report having on-site recycling facilities or services, leaving 19% in non-compliance.

Nearly three-quarters of residents report that they 'always' recycle, notably increased from two-thirds in 2017, and ALL multi-family residents recycle at least 'once in a while'.

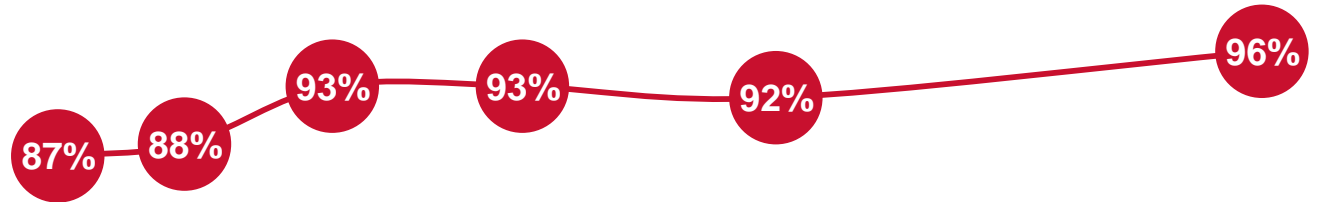
There is still room to improve compliance

There appears to be some complexes that do not meet the requirement to offer recycling facilities or services. Alternatively, residents may not be aware that their complex does so.

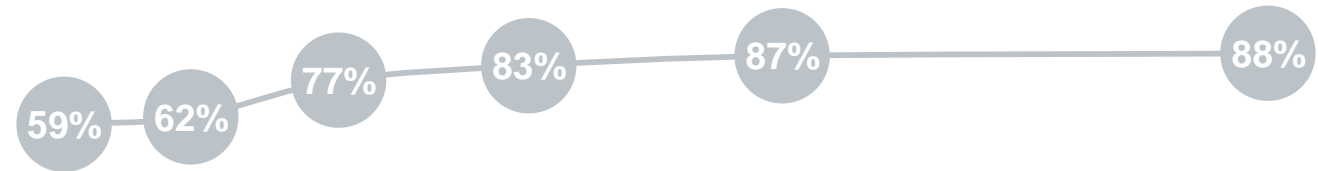
Making it easier to recycle would also increase the inclination to recycle. Residents suggest that it would be easier to recycle if it were in a more convenient location, easier to sort and less messy. Some also suggest that they need more information.

Key Metrics: Multi-Family Recycling Program

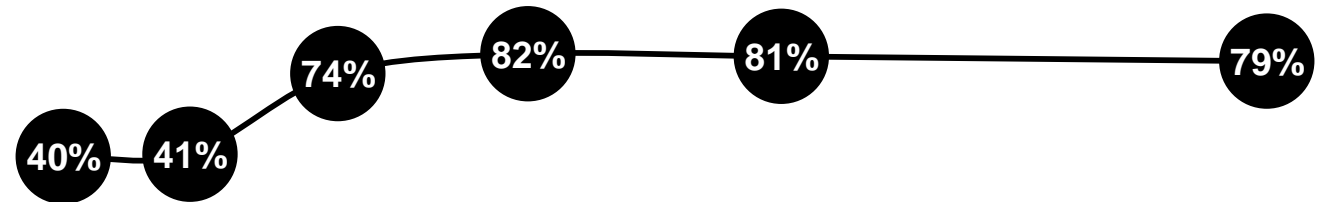
Support for the Multi-Family Recycling Program



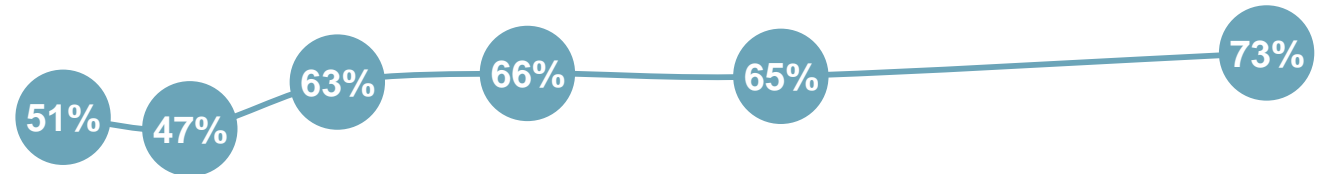
Satisfaction with Multi-Family Recycling Programs in Calgary



Incidence of an On-Site Recycling Facilities or Services



Reported Incidence of 'Always' Recycling



January 2015 July 2015 February 2016 November 2016 November 2017 October 2019

Highlights: Multi-Family Composting Collection Programs

The multi-family food and yard waste initiatives are not yet in the mature phase evidenced by the recycling program. Support and satisfaction for the food and yard waste programs are high. Compliance continues to increase, as does the frequency of composting; however, compliance with the requirement to have a food and yard waste service in the complex and the frequency of composting are lower than recycling.

Support and satisfaction for food and yard waste programs are high.

Nine-in-ten (91%) residents of multi-family housing support the food and yard waste requirements, on par with support in 2017. This level of support is only slightly below that of the recycling program.

Multi-family residents are also likely to be satisfied with their complex's composting services. At 88%, it is on a par with satisfaction with the recycling program.

Compliance and usage continue to increase.

Sixty-two percent of multi-family residents in Calgary report having on-site recycling facilities or services. This is a significant increase from the 50% measure two years ago.

Four-in-ten (41%) multi-family residents report that they 'always' use their building's compost collection program. This is a significant increase from 29% in 2017.

There is opportunity to increase the frequency and amount of composting.

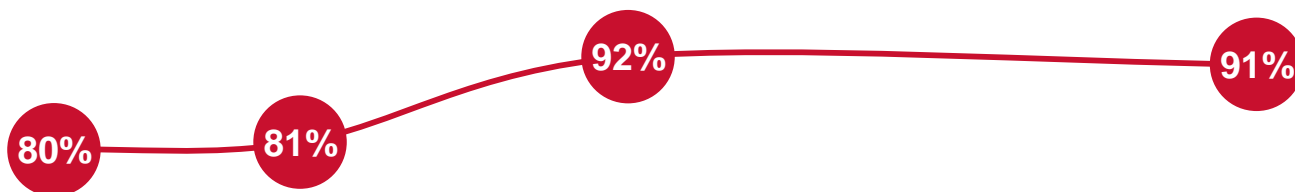
A sizeable number (38%) of multi-family residents report that their building does not offer on-site composting services (or may not be aware that a program is in place).

Among those with on-site compost collection programs, the proportion of composting items remains far from the incidence of the ability and availability to compost items.

Making it easier and more convenient to compost (and less messy or smelly) may improve the likelihood that multi-family residents would compost more often.

Key Metrics: Multi-Family Compost Collection Program

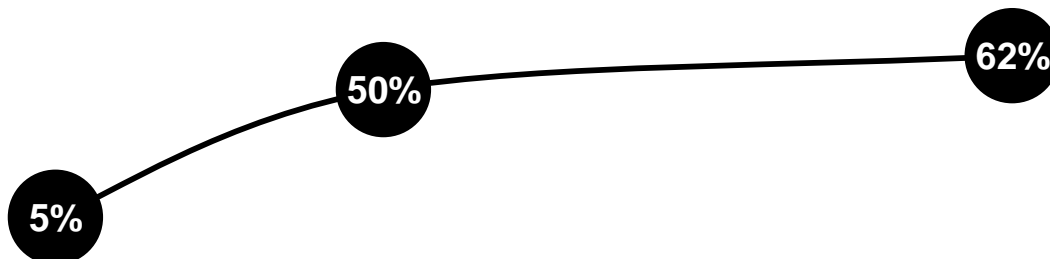
Support for the Multi-Family Food and Yard Waste Requirements



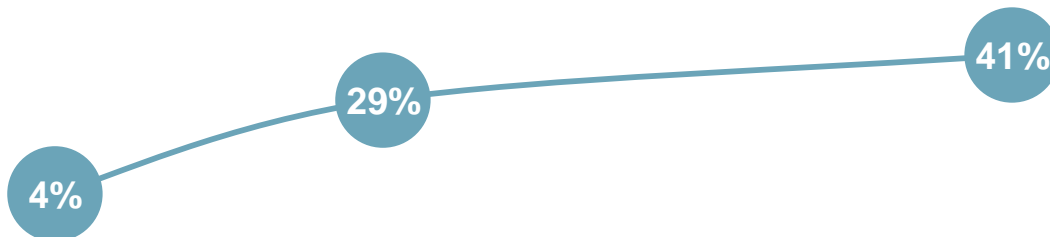
Satisfaction with Complex's Composting Services*

88%

Incidence of On-Site Composting Collection or Services



Reported Incidence of 'Always' Using Building's Compost Collection Program



February
2016

November
2016

November
2017

October
2019

* Based on respondents whose complex provides composting collection or services. Not tracked prior to 2019.

The City of Calgary needs to continue to educate and motivate



The City of Calgary is not responsible for implementing or maintaining multi-family residential recycling and food and yard waste programs. However, there is opportunity for The City to continue to educate and motivate owners/managers of multi-family complexes as well as the residents in these buildings.

Communications with complexes



When 'educating and motivating' owners and managers of multi-family complexes, The City should provide more information and also encourage complexes to provide more information to the residents of their building. The provision of information is the primary factor that would make it easier to divert waste and the lack of information is a key driver influencing multi-family residents *not* to divert waste. Further, buildings need to be encouraged to display clear informative signage for their waste diversion programs and reminded that the placement of their bins and their upkeep matter (accessibility, safety, cleanliness).

Communications with multi-family residents



Multi-family residents strongly support waste diversion initiatives, so communications related to the benefits of diverting waste are not the most important messages to convey. Rather, providing tips to make it 'easy' to recycle or compost (i.e. setting up separate stations within their residence) and enforcing the message that it is up to each individual to do their part in reaching the overall goal of The City will be more valuable. Key messages need to combat perceptions that waste diversion 'takes too much time and effort' by showing how simple and quick waste diversion can be.



Multi-Family Recycling Programs



Summary I Incidence of Recycling Programs

The incidence of on-site recycling programs in multi-family residences has plateaued.

- Eight-in-ten (79%) multi-family residents say their building or complex has recycling facilities or offers any recycling services, on par with the incidence seen in 2017 (81%).
- Compliance in having an on-site recycling program is statistically higher among:
 - Those residing in condominiums (88%) vs. apartments (76%) or townhouses/rowhouses (74%);
 - Multi-family residents in the Southwest (83%) vs. those residing in the Northwest (67%);
 - Females (83%) vs. males (75%);
 - Smaller multi-family household sizes of one person (85%) or two people (82%) vs. three or more people (61%);
 - Owners (84%) vs. renters (75%);
 - Those who have received information from their complex about its recycling program (87%) vs. 71% among those who have not; and,
 - Those who primarily speak English at home (81%) vs. those who do not primarily speak English at home (61%).

➤ The frequency of recycling continues to increase.

- Almost three-quarters (73%) of multi-family residents say they 'always' recycle, significantly increased from 65% in 2017. Another 19% say they do so 'most of the time', bringing the current frequency of recycling up to 92% either 'always' or 'most of the time'.
 - Avid recyclers ('always') are more likely to be university-educated (76% vs. those with a high school diploma or less 64%).
- When looking at recycling behaviours with specific items, the rate of 'always' recycling is highest for beverage containers (83%), followed by glass bottles or jars (76%), newspapers, cardboard and other paper (75%) and plastic jugs and containers (73%).
 - Rates of 'always' recycling are relatively lower for metal food cans or foil (59%) or stretchy plastic bags (51%).
- In order to recycle items, 70% are using a recycling dumpster or bin provided by their complex, which has risen a significant 26 percentage points since 2017 (44%).
 - Further, 23% are recycling via a bottle depot, 11% through their complex's recycling program, 11% say their complex has an area to leave recycling, and an additional 11% are using community recycling depots.
 - Fewer residents of multi-family buildings state that their complex has a private collector for recycling (8%), that they donate their recycling (3%) or leave their recycling out for bottle collectors (3%).



Location and provision of recycling information are the two main motivators to make it easier for multi-family residents to recycle.

- As a new question in 2019, almost one-half (47%) of multi-family residents say ‘nothing’ would make it easier for them to recycle or they do not know what could be done to make it easier.
- Among those offering commentary, 17% of multi-family residents comment that their complex needs to ‘choose a better location to place the recycling/make it easier to get to the location’. In addition, 12% say that if the complex or others were to ‘provide more information’ about recycling and the complex’s program, it would make it easier for them to recycle.
- Other comments that would make it easier for multi-family residents to recycle involve ‘make it easier to sort items that are to be recycled’ (9%), ‘recycling should be picked up’ (5%), ‘make it tidier/neater/less smelly’ (3%), and ‘provide more bins/bigger bins/better bins’ (3%).
- Among those who never recycle (<1%), the reasons they provided include:
 - Their building does not offer recycling/ does not have a collection service;
 - There is no room to store recycling;
 - It is ‘inconvenient’;
 - There are garbage room related challenges (unsafe/’gross’); and,
 - There are accessibility issues with the bins (too high, lids too heavy).

Summary I Acceptable Materials and Support for Multi-Family Recycling Programs

The majority of multi-family recycling programs continue to accept items commonly recycled.

- The most common materials that can be recycled on-site through buildings' recycling programs include cardboard (97%, similar to 98% in 2017), paper (95%, also consistent with 97% in 2017), plastic (90%, on par with 91% in 2017), and glass (85%, similar to 87% in 2017).
- The majority (78%) of multi-family on-site recycling programs also accept metal, consistent with 80% in 2017, and refundable beverage containers (70%, somewhat lower than 77% in 2017).

Support for the multi-family recycling program is extremely high, and has notably increased over the past two years.

- Currently, 96% of multi-family residents say they support the multi-family recycling program with eight-in-ten strongly supporting the program, statistically increased from 92% in 2017.
 - The intensity of support has also risen significantly with 80% of multi-family residents saying that they 'strongly' support the program, up 14 percentage points from 66% in 2017.
 - 'Strong' support for the multi-family recycling program is notably higher among females (84% vs. 75% of males) and among younger multi-family residents aged 18-34 (86% vs. 75% among those aged 35 to 54 and 76% among those aged 55+).

Summary | Satisfaction with Multi-Family Recycling Programs

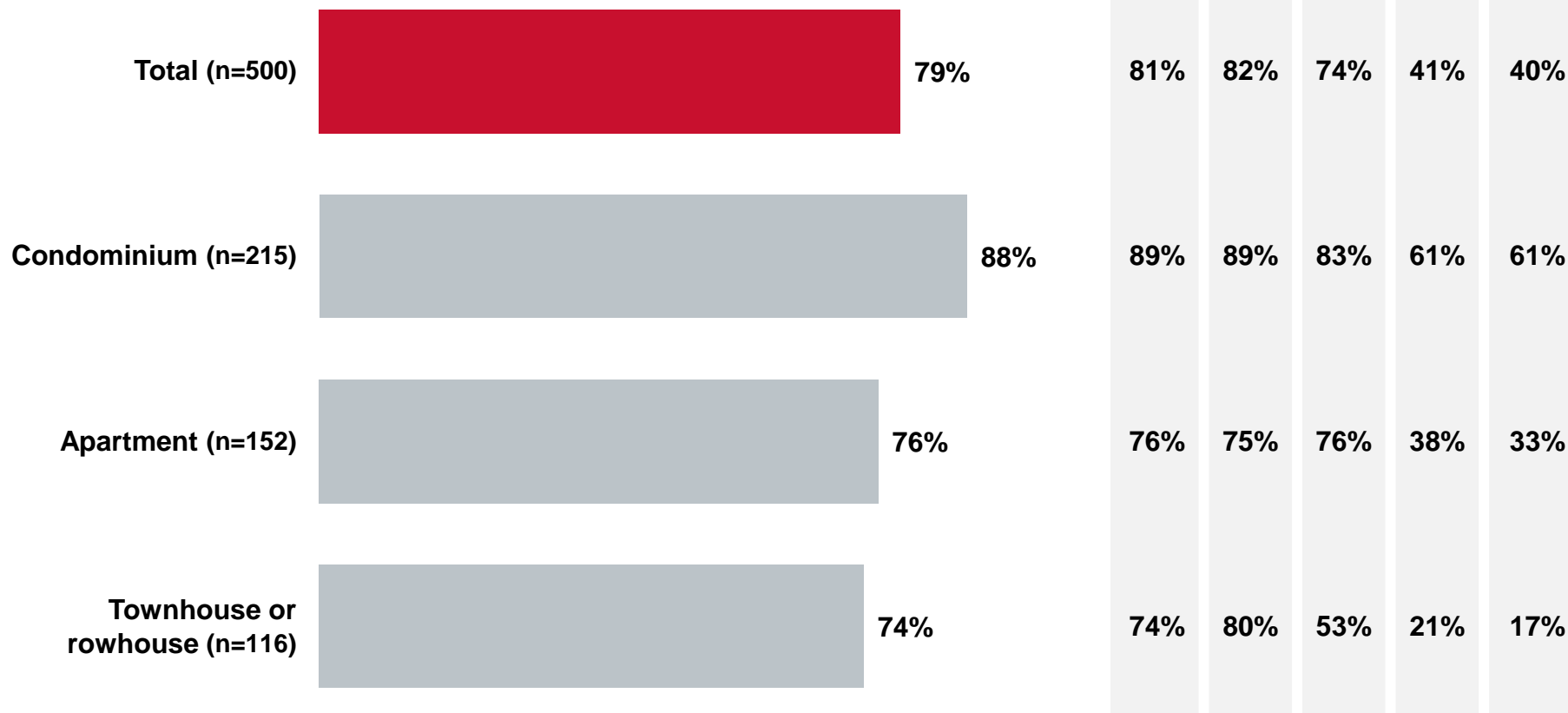
 **Overall satisfaction with multi-family recycling programs remains strong with a significant increase in the proportion of multi-family residents who are ‘very’ satisfied.**

- Fully 88% of multi-family residents are satisfied with multi-family residential recycling programs in Calgary, consistent with 87% in 2017.
 - Currently, 50% say they are ‘very’ satisfied with multi-family recycling programs which shows a statistical increase of 11 percentage points from 39% two years ago.
 - Older multi-family residents aged 55+ express notably higher overall satisfaction scores than do those aged 35 to 54 (91% vs. 82%, respectively) and are also significantly more likely to say they are ‘very’ satisfied (56% vs. 42%, respectively).

Incidence of On-Site Recycling Services

October 2019

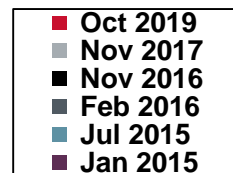
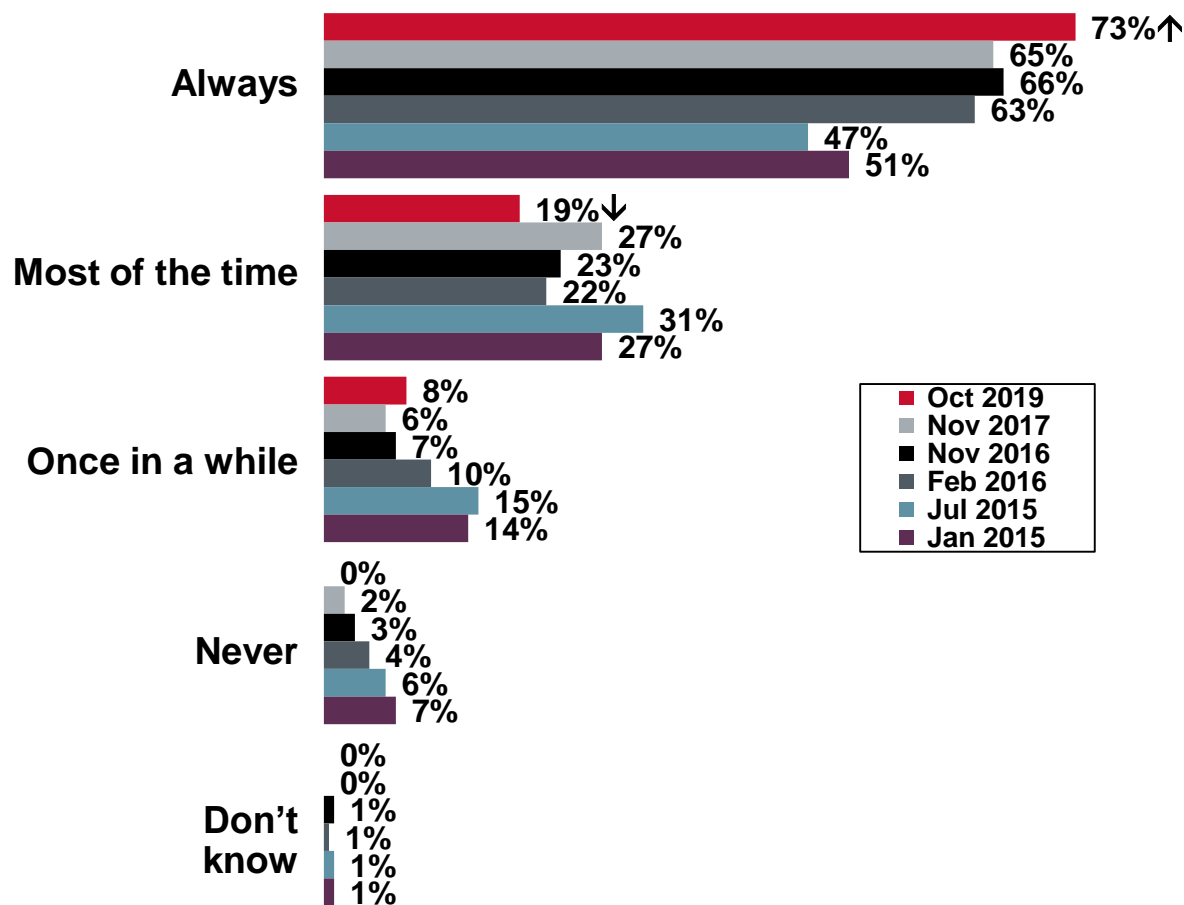
% Yes



Q7. Does your building or complex have any recycling facilities or offer any recycling services?

Base: All respondents, Jan 15: n=500, Jul 15: n=500, Feb 16: n=502, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500

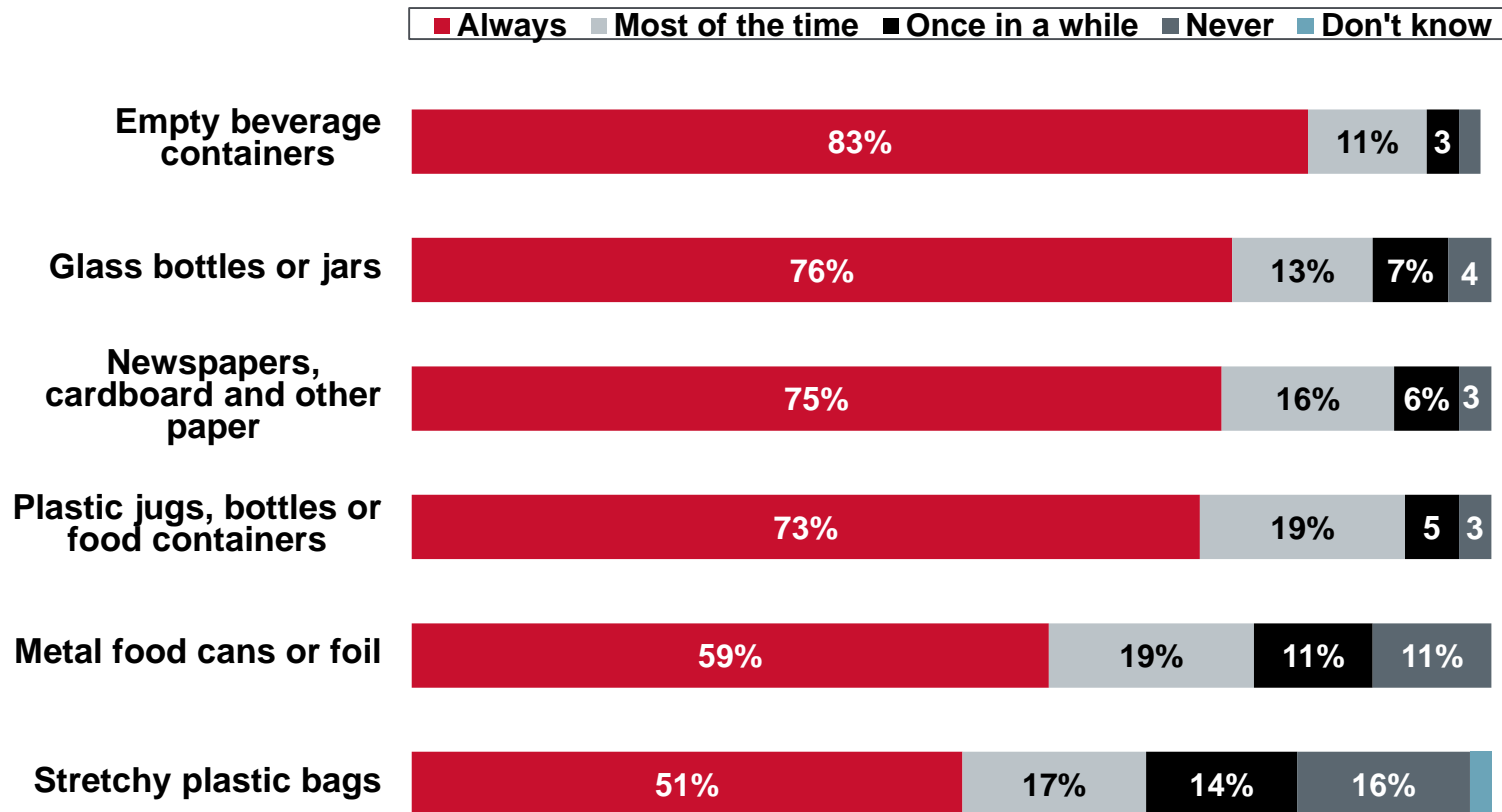
Frequency of Recycling



Q3. How often does your household recycle – always, most of the time, once in a while or never? (Base: All respondents, Jan 15; n=500, Jul 15; n=500, Feb 16; n=502, Nov 16; n=501, Nov 17; n=500, Oct 19; n=500)

↑Statistically higher than 2017
↓Statistically lower than 2017

Frequency of Recycling and Incidence of Recycling Specific Items

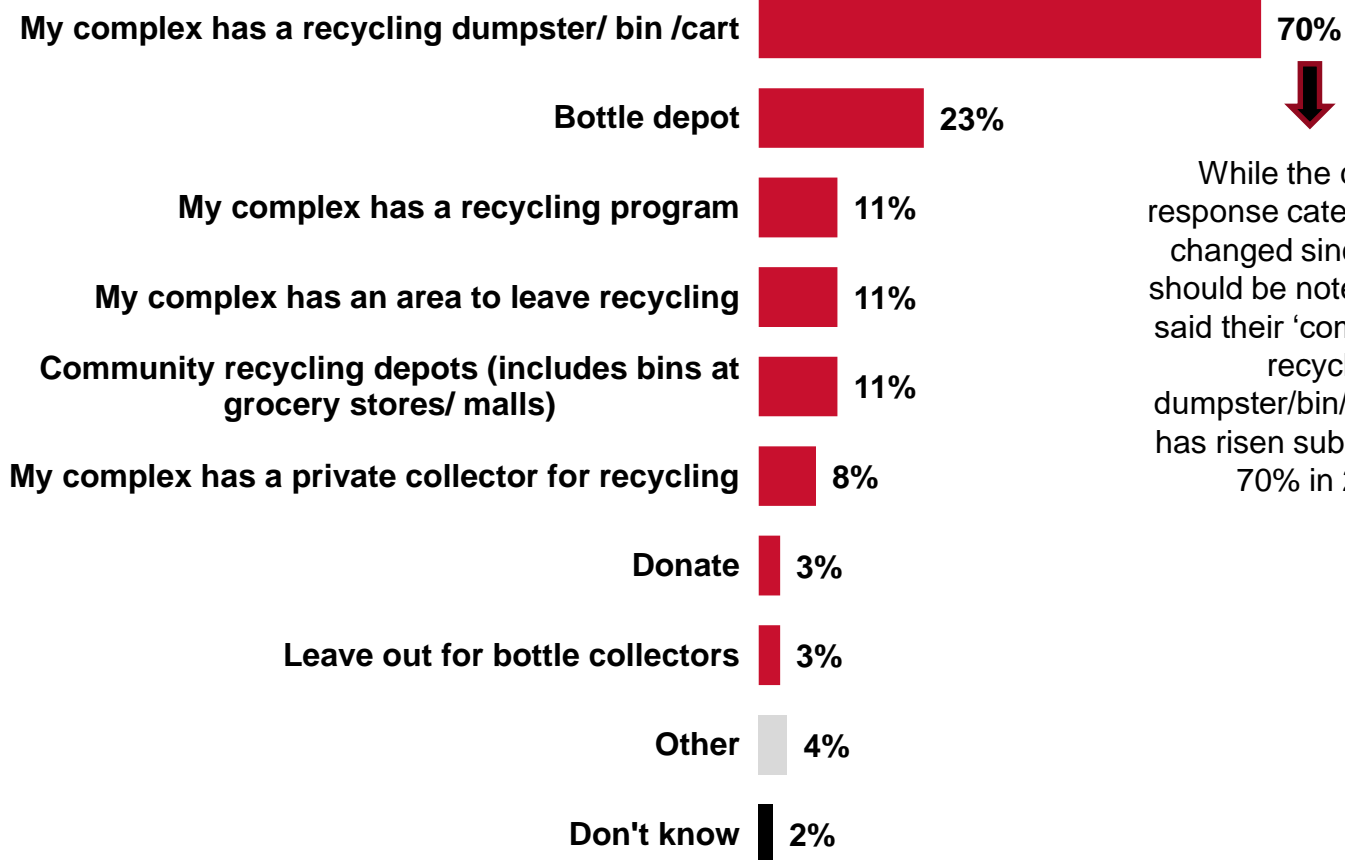


Q4. How often does your household currently recycle...? (Base: HH recycles always, most of the time or once in a while, Jan 15: n=462, Jul 15: n=469, Feb 16: n=481, Nov 16: n=484, Nov 17: n=492, Oct 19: n=497)

Question wording and response categories changed in 2019. Direct tracking is not possible.

Means of Recycling

Multiple Responses



While the question response categories have changed since 2017, it should be noted that 44% said their 'complex has a recycling dumpster/bin/cart' which has risen substantially to 70% in 2019.

Q5. How or where does your household currently recycle these types of items?
(Base: Household recycles specific items, n=495)

Response categories changed in 2019. Direct tracking is not possible.

What Would Make it Easier For You to Recycle

Multiple Responses



*New question in 2019

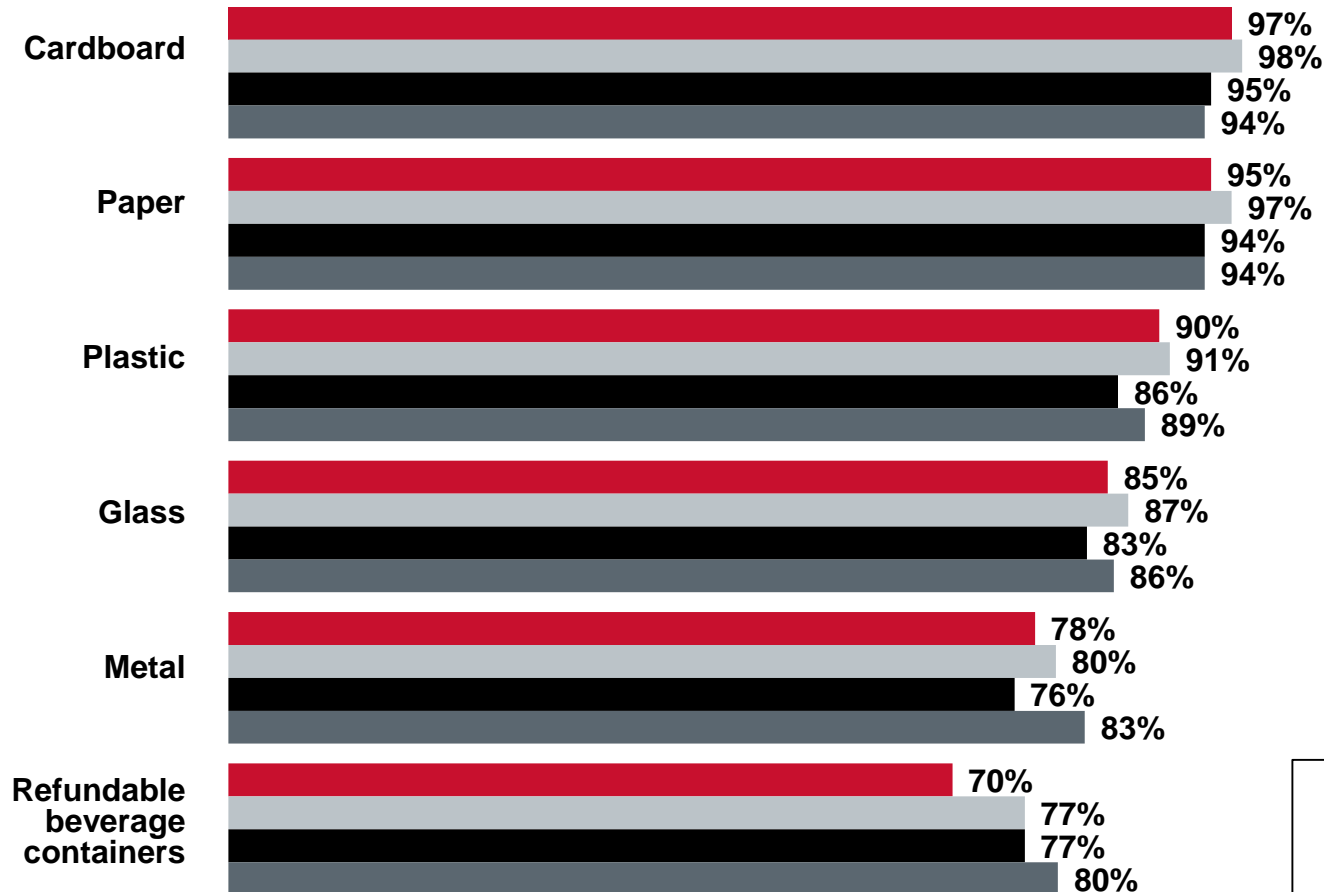
Q6B. What would make it easier for you to recycle? What would have to happen to make it easier for you to recycle?

(Base: All respondents, n=500)

Materials That Can Be Recycled On-Site

Multiple
Responses

% Yes



■ Oct 2019
■ Nov 2017
■ Nov 2016
■ Feb 2016

Q8. Can the following materials be recycled through recycling facilities or services offered by your complex?
 (Base: Complex offers recycling services, Feb 16: n=371, Nov 16: n=416, Nov 17: n=409, Oct 19: n=401)

Support for the Multi-Family Recycling Program

ALL WAVES:

As you may know, all multi-family complexes (will be) have been required to provide on-site recycling for residents (by) since February 1, 2016.

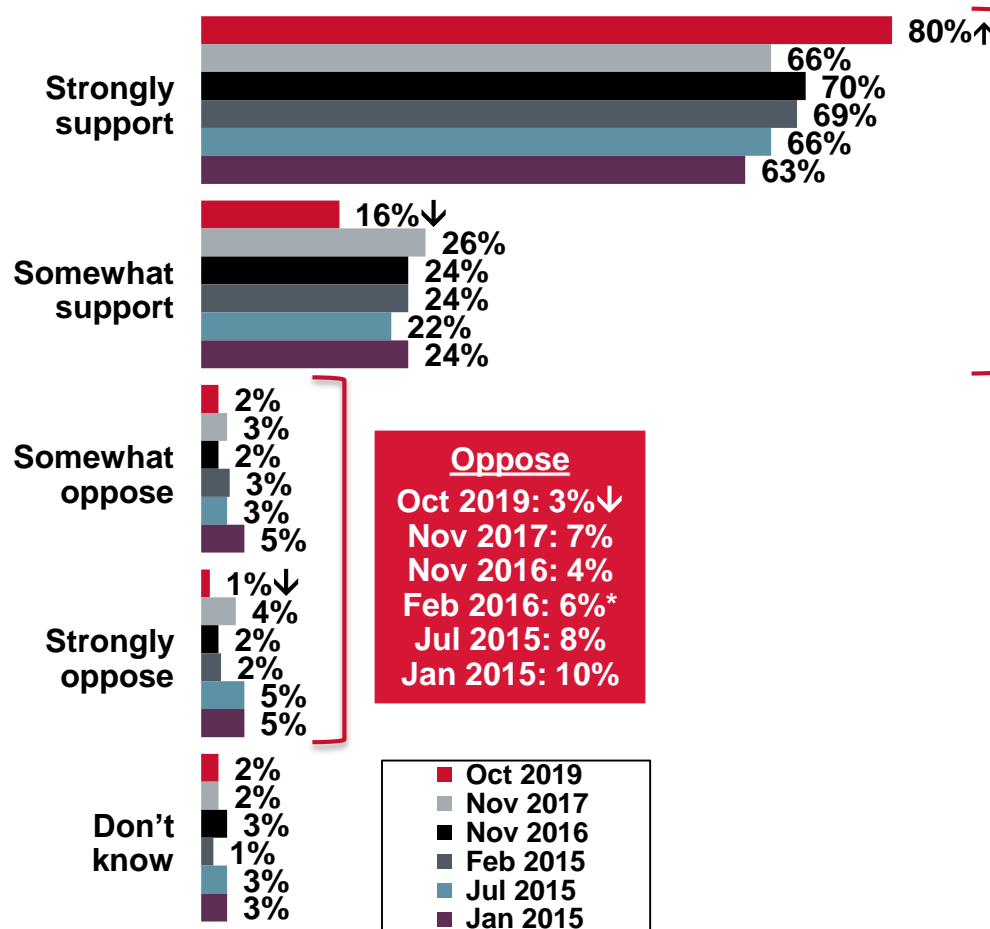
WAVES 1 TO 5 ONLY:**

The program must accept at least the same materials as Blue Carts.

Each complex can decide how and where to store recycling, and whether to hire a company to recycle it or do it themselves.

Your building owner or manager (will be) is responsible for choosing the recycling method, negotiating contracts, and setting and collecting any fees.

The City of Calgary will not set or collect fees, and taxes will not be raised to pay for the program.



Support

Oct 2019: 96%↑
Nov 2017: 92%
Nov 2016: 93%*
Feb 2016: 93%
Jul 2015: 88%
Jan 2015: 87%

Oppose

Oct 2019: 3%↓
Nov 2017: 7%
Nov 2016: 4%
Feb 2016: 6%*
Jul 2015: 8%
Jan 2015: 10%

Oct 2019
Nov 2017
Nov 2016
Feb 2016
Jul 2015
Jan 2015

*Rounding

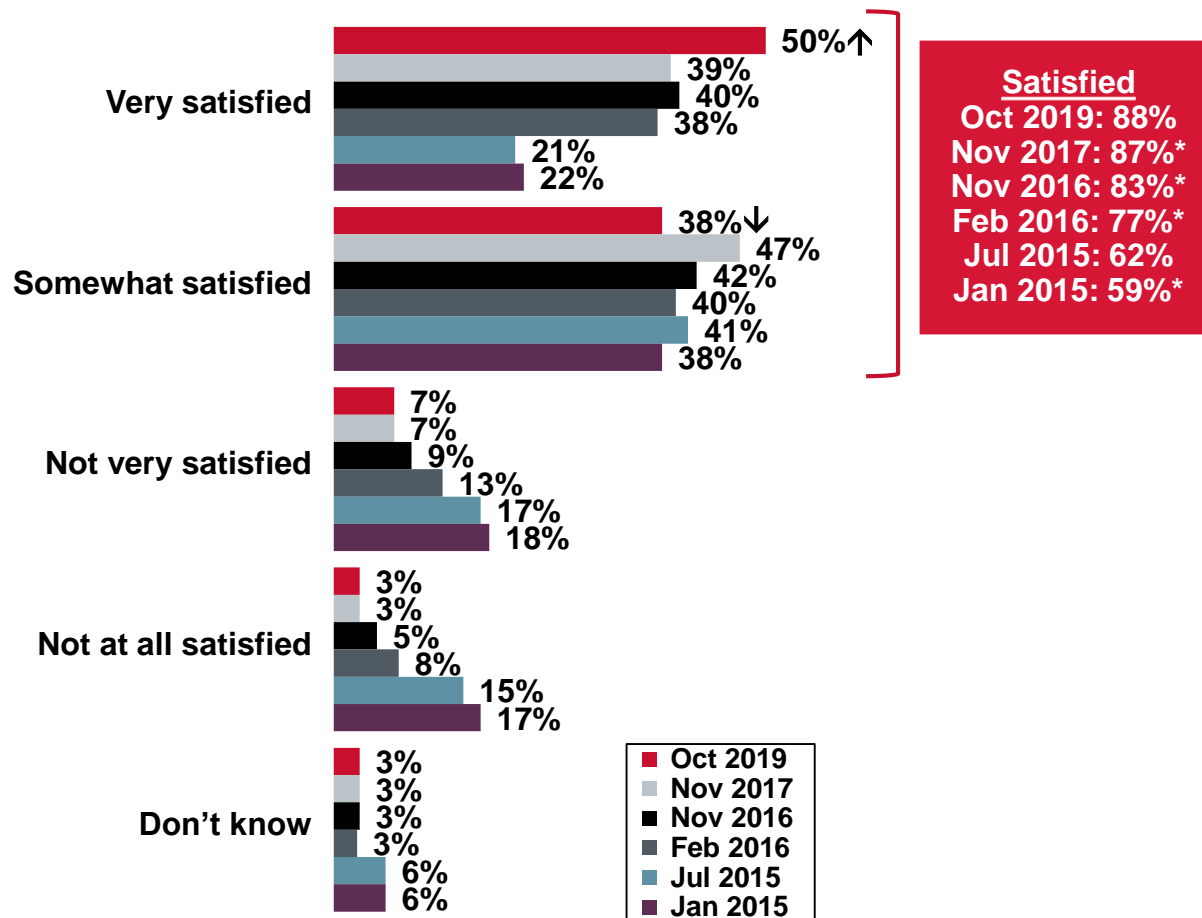
↑Statistically higher than 2017
↓Statistically lower than 2017

** Note: question wording slightly changed in 2019

Q18B. Do you personally support or oppose the multi-family recycling program?

(Base: All respondents, Jan 15: n=500, Jul 15: n=500, Feb 16: n=502, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500)

Satisfaction with Multi-Family Residential Recycling Programs



*Rounding

↑Statistically higher than 2017
 ↓Statistically lower than 2017

Q10. Overall, how satisfied are you with multi-family residential recycling programs in Calgary?
 (Base: All respondents, Jan 15: n=500, Jul 15: n=500, Feb 16: n=502, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500)



Multi-Family Food and Yard Waste Programs



Summary I Incidence of Multi-Family Food and Yard Waste Collection Services



The incidence of having an on-site food and yard waste collection service has significantly increased, yet one-third are in non-compliance.

- Almost two years after the bylaw came into effect, more than six-in-ten (62%) multi-family residents say their building or complex has composting facilities or offers food and yard waste collection services, statistically increased from 50% in 2017.
- However, 33% say that their building does not have a composting program and 5% are unsure.
 - Non-compliance is higher in apartments (39%) than in condominiums (26%).



One-third of those with an on-site composting program did not comply with the timelines associated with the multi-family food and yard waste bylaw.

- Respondents who have an on-site composting program were further asked *when* their building introduced their food and yard waste program. Slightly more than one-third (35%) say that the program was introduced one year to less than 18 months ago (21%), six months to less than one year ago (9%) or one month to less than six months ago (5%).
- An additional 14% are unsure of the timing of implementation and 51% say their composting program was introduced 18 months ago or more.

Summary | Acceptable Items and Frequency of Multi-Family Composting



The vast majority of on-site composting services accept typical food waste items, while yard waste is accepted by three-quarters of composting programs and pet waste is only accepted by one-half of on-site services.

- Among those who reside in a building with an on-site composting program, 97% accept food scraps, 97% accept fruit and vegetable peelings and 93% accept bread, pasta and rice.
- Further, a sizeable majority of the on-site composting services accept meat, bones and dairy (91%) as well as food-soiled paper products, paper towels and tissues (87%).
- A somewhat lower proportion of on-site composting programs accept yard waste, including plants, soil, grass and leaves (76%) and just one-half (51%) accept pet waste.



Multi-family residents are not taking full advantage of composting items which are accepted by their building's composting program.

- Among those who have items to compost and have an on-site composting service, multi-family residents are most often composting fruit and vegetable peelings (62% either 'always' or 'most of the time', followed by food scraps (60%), bread, pasta and rice (56%), meat, bones and dairy (55%), and food-soiled paper products, paper towels and tissues (54%).
- In addition, 50% are composting plants, grass and leaves and just 24% are composting pet waste.

Summary I Multi-Family Disposal of Fruit and Vegetable Scraps

Disposing of fruit and vegetable scraps through on-site composting programs has significantly risen over the past two years and throwing them in the garbage has positively declined, although there is still room to improve these behaviours.

- More than one-half (55%, statistically up from 40% in 2017) of multi-family residents currently disposes of fruit and vegetable scraps through their building's compost collection program either 'always' (41%, significantly increased from 29% in 2017) or 'most of the time' (14%, similar to 11% in 2017).
- Positively, a smaller proportion (41%, notably down from 56% in 2017) of multi-family residents is now throwing fruit and vegetable scraps in the garbage either 'always' (27%, significantly down from 43% in 2017) or 'most of the time' (14%, on par with 13% two years ago).
- One-in-ten (10%) are disposing of fruit and vegetable scraps through their in-sink garbage disposal unit or garburator, also down from 17% in 2017, and less than one-in-ten (8%) are disposing of them in their backyard composter, slightly down from 13% in 2017.

Just over one-half of multi-family residents are using on-site compost bins to dispose of compostable items, while a smaller proportion is using alternative on-site services and options.

- Compostable items are being disposed of primarily through multi-family residents' on-site compost dumpster/bin/cart (53%).
- Additional means of composting include the building's private compost collector (8%), by leaving compost in a designated area on-site (8%) or through the complex's composting program (6%).

Summary I Multi-Family Barriers and Motivators to Compost



Barriers to composting fruit and vegetable scraps are both physical (lack the infrastructure) and attitudinal (lack interest and effort) in nature.

- The main reasons for not composting fruit and vegetable scraps rest with a lack of an on-site composter (22%), feeling that composting is 'inconvenient' (which has statistically risen from 6% in 2017 to 19% in 2019) and that composting is 'too messy or smelly' (19%, notably up from 5% in 2017).
- Additional reasons for not composting fruit and vegetable scraps include not having a Green Cart/bin (10%), not having a space to put a composter/no yard (9%) and feeling that it is 'too much trouble' (8%).



Accessible placement and upkeep of composting bins would make it easier for multi-family residents to compost.

- Almost one-half of multi-family residents say that 'nothing' (27%) would make it easier for them to compost or that they don't know (17%) what would support them to do so.
- Among those offering comments, 23% want more bins/better bins/bigger bins, 15% want their building to choose a better location for the compost bins to make it easier to get to them, 7% want the compost bins to be 'tidier' or 'less smelly', and 6% want more information about what can and cannot be composted.

Summary | Support and Satisfaction with Multi-Family Food and Yard Waste Programs

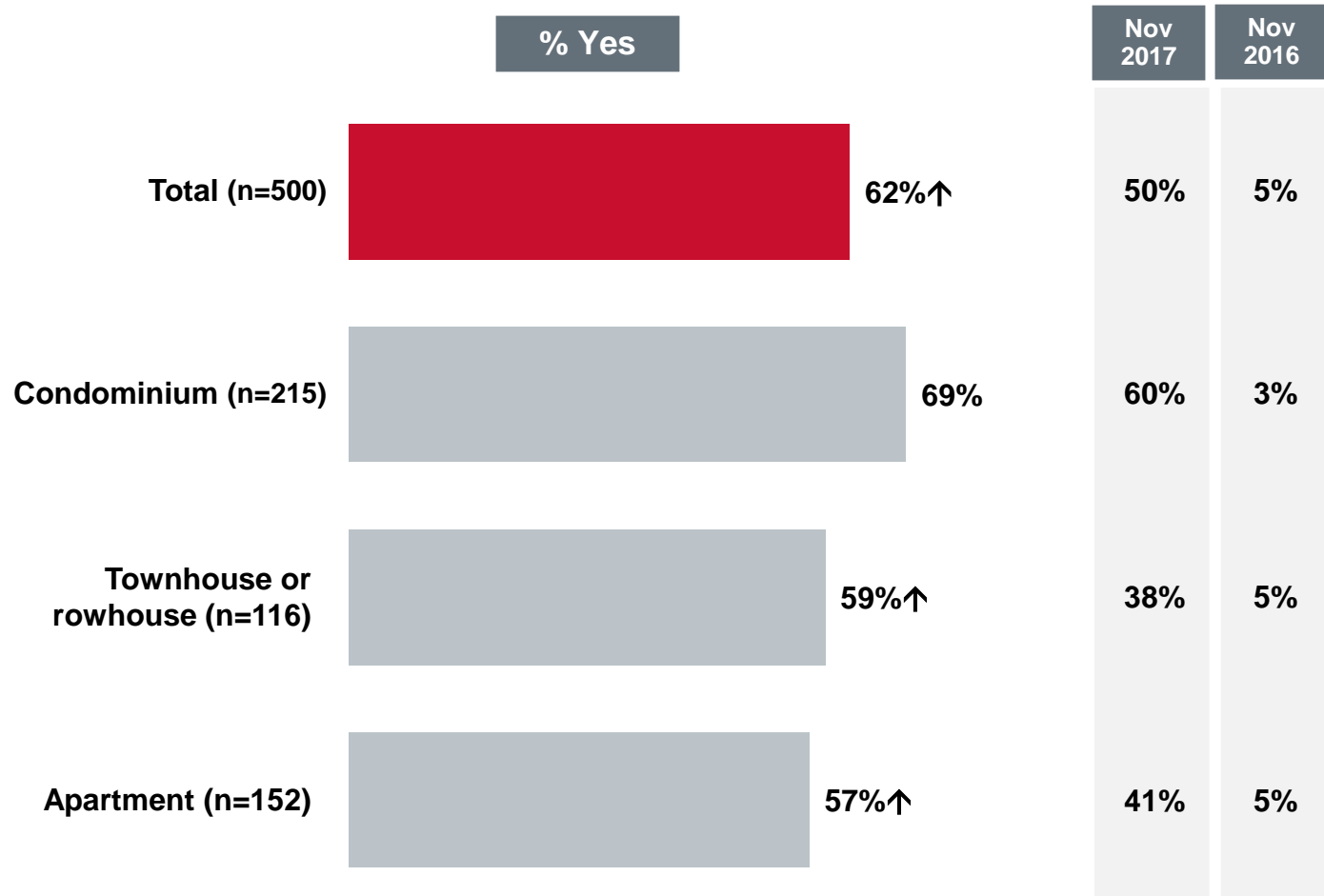
Multi-family residents express widespread support for the food and yard waste bylaw requirements, consistent with 2017 measures.

- Fully 91% of multi-family residents support the bylaw requirements to require all multi-family complexes to separate food and yard waste from garbage for composting, with 67% who 'strongly' support this initiative. Results are consistent with measures in 2017 (92% overall support, including 69% expressing 'strong' support).
- Those who are more likely to 'strongly' support the multi-family food and waste diversion bylaw requirements include:
 - Females (76% vs 58% of males), younger multi-family residents aged 18-34 (74% vs 61% 35-54 years) and among larger households with 3 or more people (79%) vs. one-person households (60%).

Satisfaction with on-site composting services receives a strong benchmark among almost nine-in-ten multi-family residents.

- Among those who have a composting program in their complex, overall satisfaction with the composting collection services are strong (88%), including 59% who are 'very' satisfied. This is a benchmark measure in 2019.
- Strong satisfaction (i.e. % 'very' satisfied) is notably higher among:
 - Those who live in a condominium (71%) vs. in an apartment (46%);
 - Those aged 55+ (69%) vs. 35-54 (49%); and,
 - Those residing in building which implemented composting services at least 18 months ago (66%) vs. those residing in multi-family buildings which have only recently implemented composting programs within the past year to 18 months (50%) or within the past six months to one year (34%). It appears that the more experience that multi-family residents have with their complex's programs, the more satisfied they become.

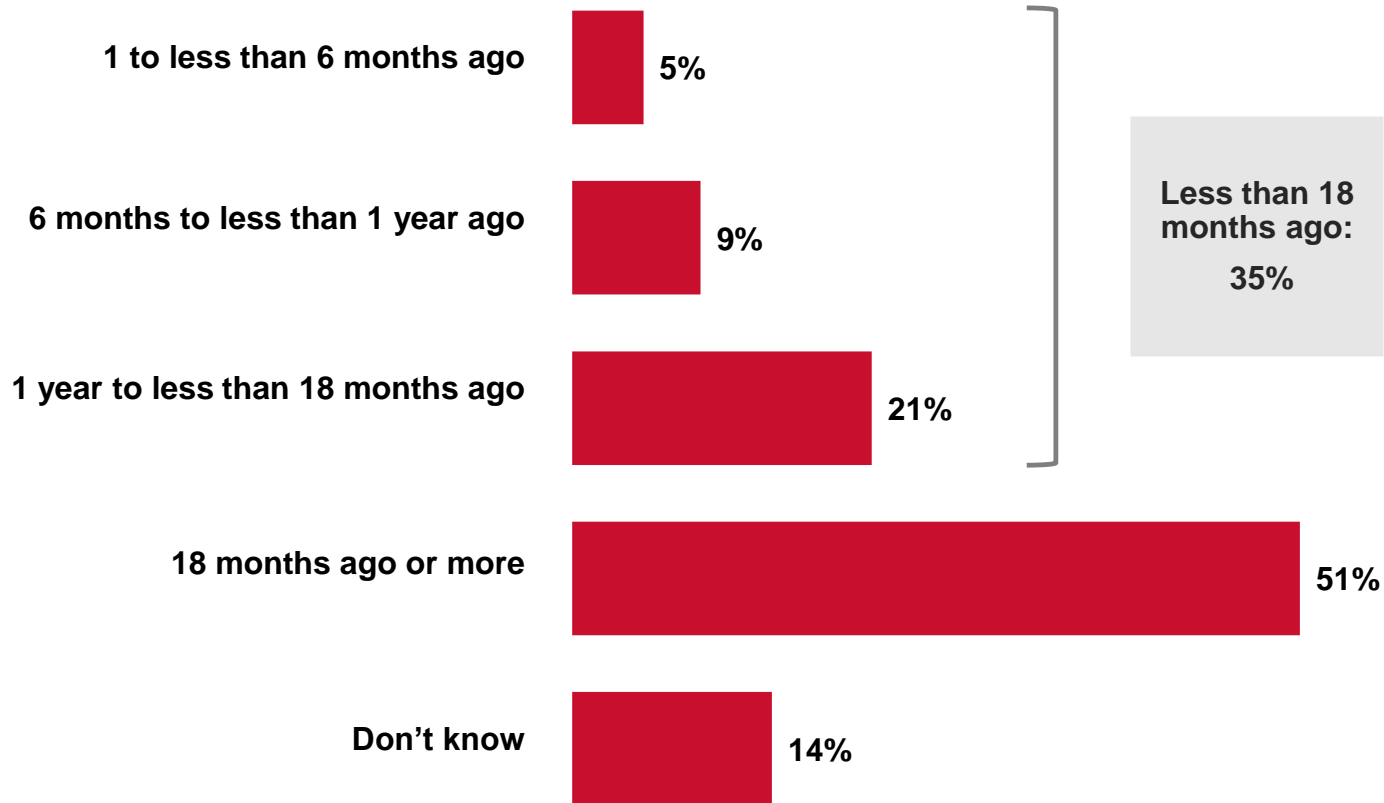
Incidence of On-Site Composting Facilities or Food and Yard Waste Collection Services



↑ Statistically higher than 2017
↓ Statistically lower than 2017

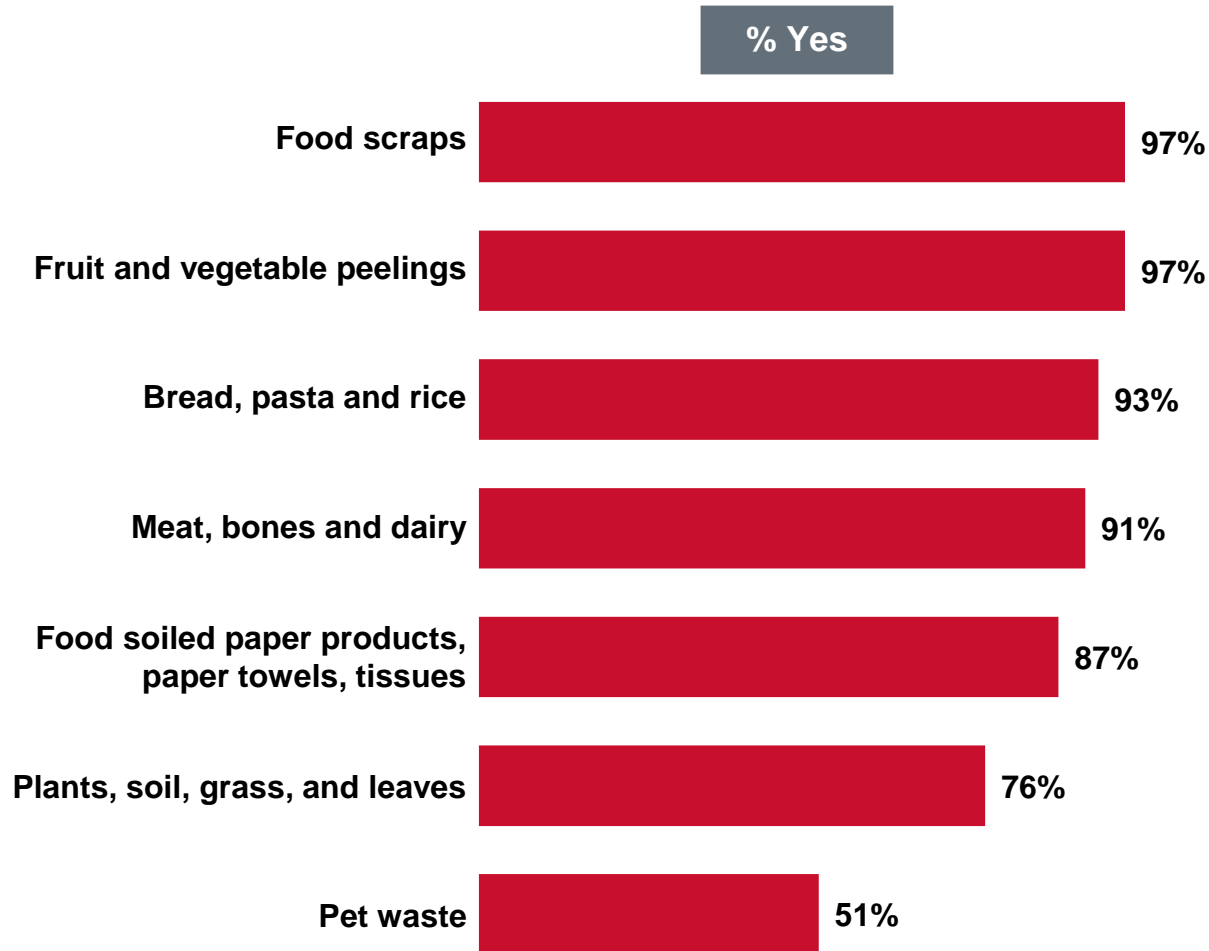
QFYW4. Does your building or complex have any composting facilities or offer any food and yard waste collection services? (Base: All respondents, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500)

Timing of Adding On-Site Composting Services



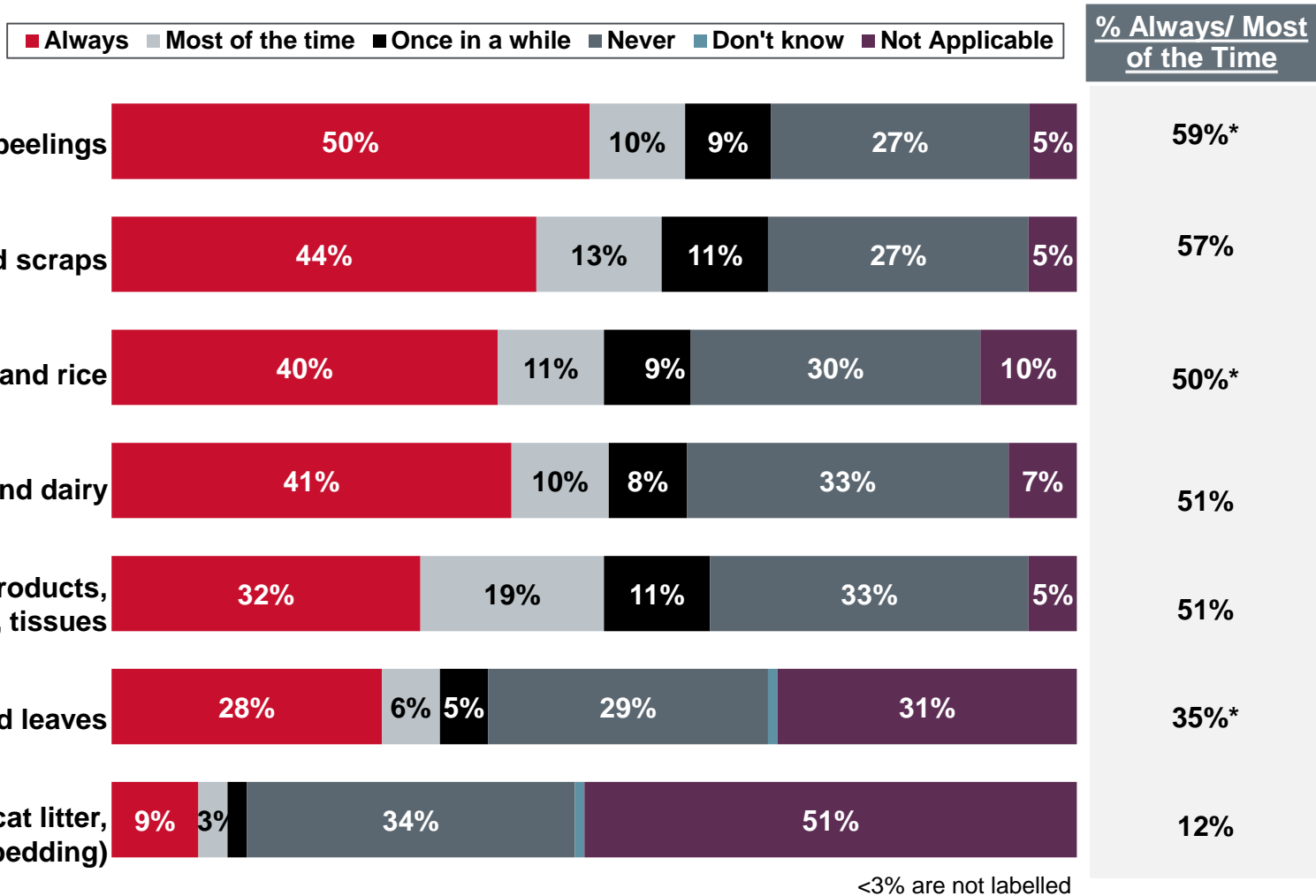
**New question in 2019*
QFYW4Y. To the best of your knowledge, when was a food and yard waste or composting program introduced to your building? (Base: Those whose complex provides composting collection or services, n= 323)

Items Accepted by On-Site Composting Services



**New question in 2019*
QFYW4X. Can your building's composting program accept the following materials . . . ?
(Base: Those whose complex provides composting collection or services, n=323)

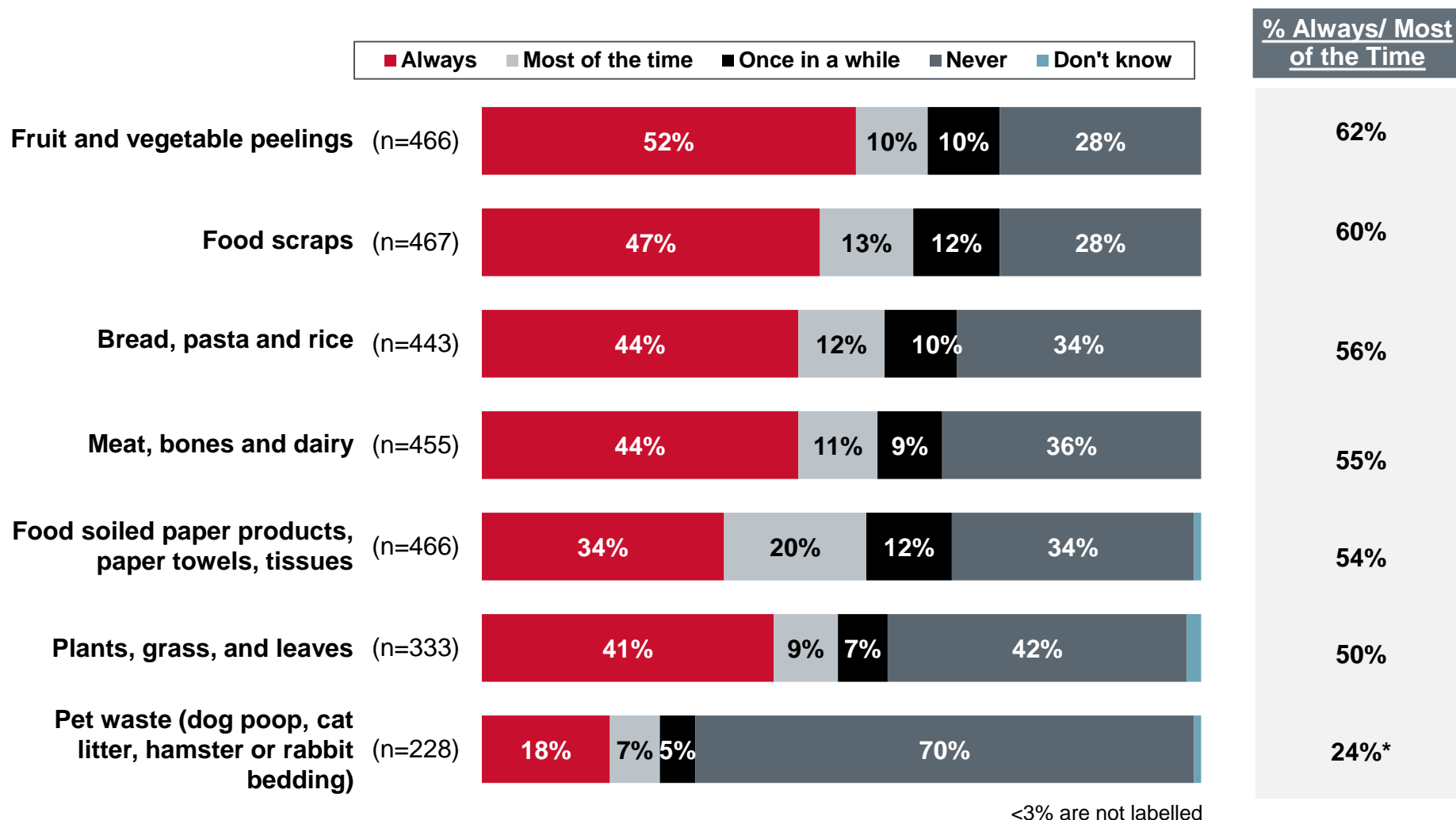
Frequency of Composting Behaviours by Item – Including “Not Applicable”



*New question in 2019
 QFYW2B. How often does your household currently compost . . . ?
 (Base: Respondents who compost always, most of the time, or once in a while, n=491)

*Rounding

Frequency of Composting Behaviours by Item – Excluding “Not Applicable”



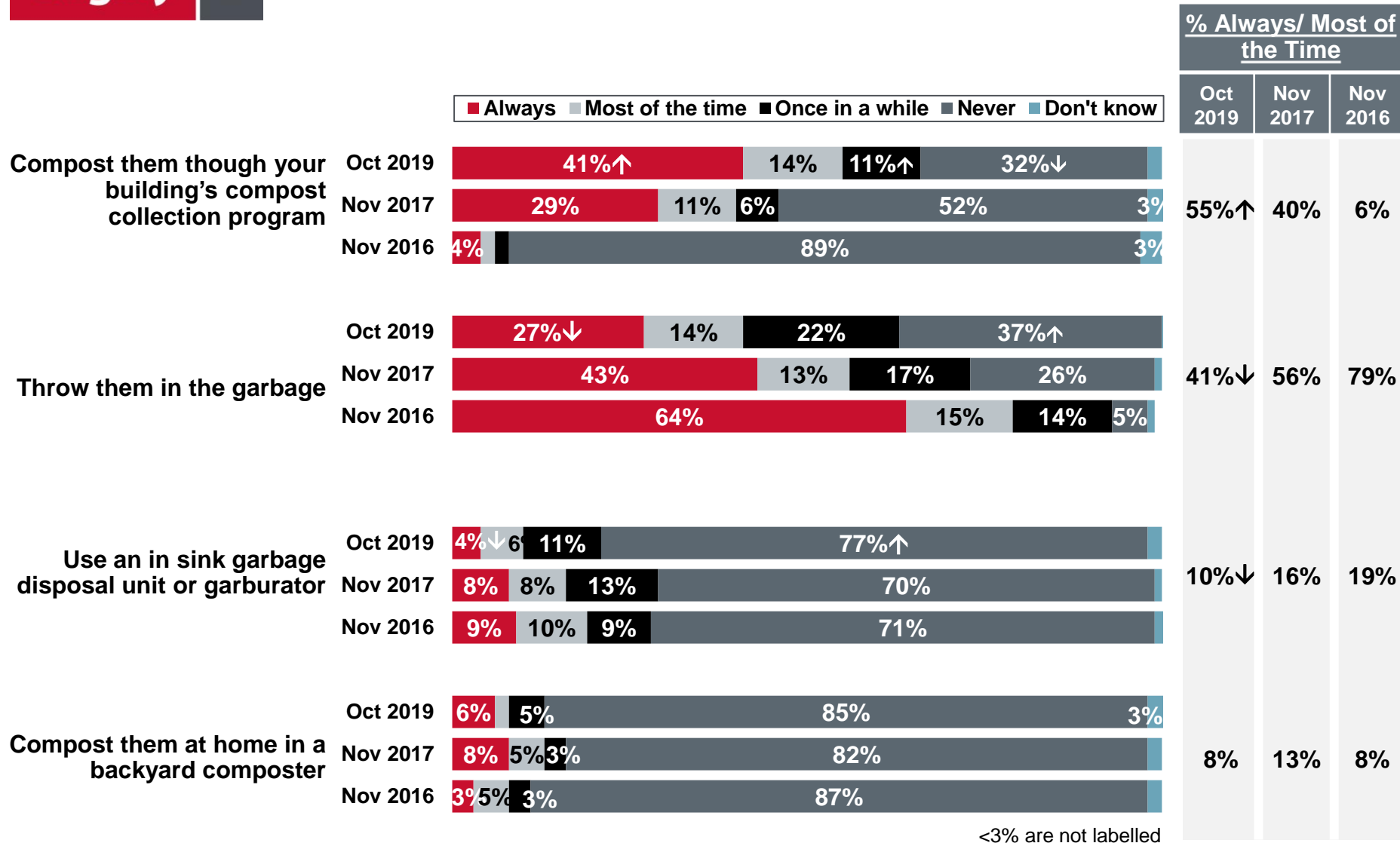
*New question in 2019

QFYW2B. How often does your household currently compost . . . ?

(Base: Respondents who compost always, most of the time, or once in a while. Excludes “not applicable”).

*Rounding

Disposal of Food Scraps

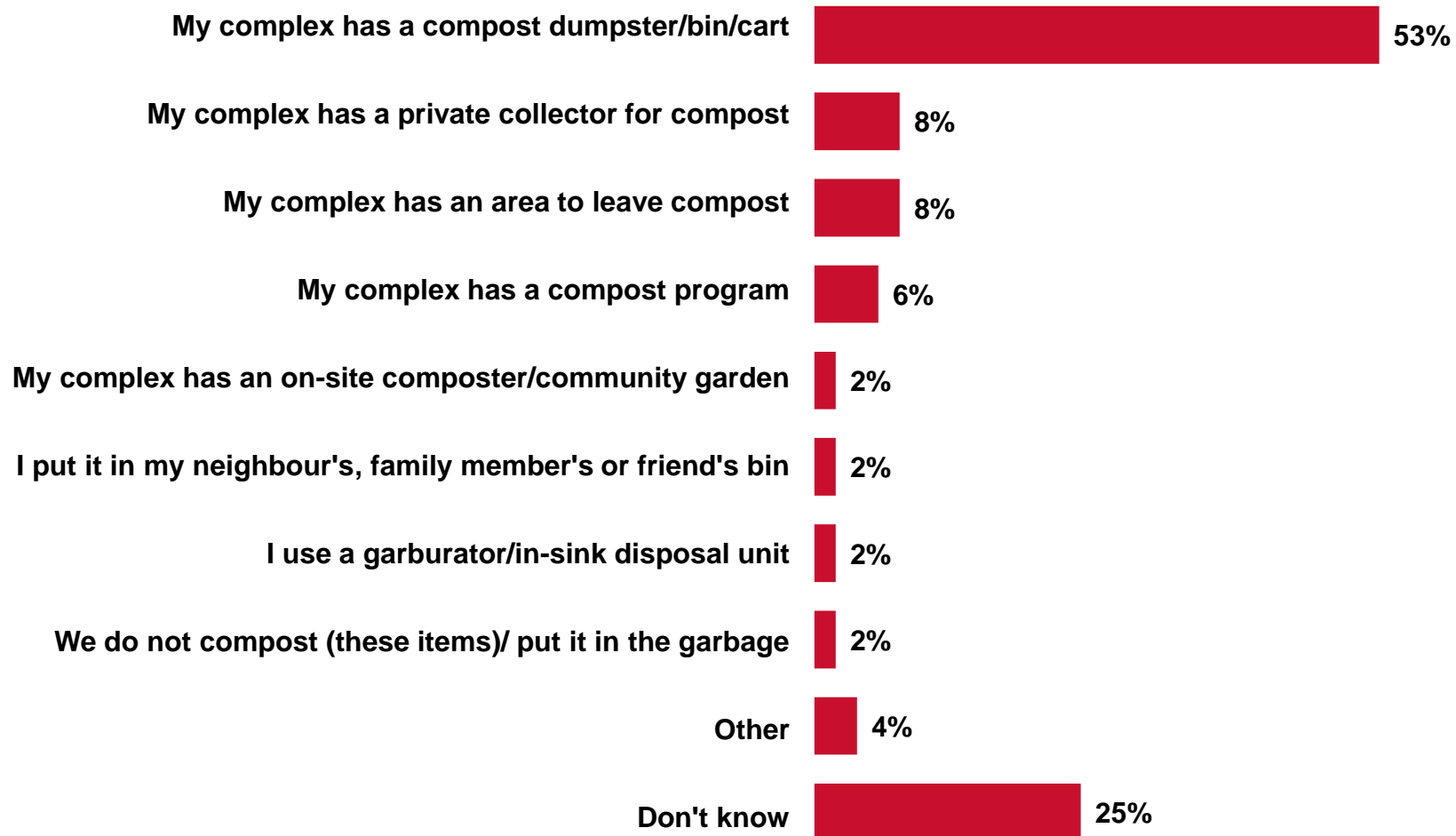


↑Statistically higher than 2017
↓Statistically lower than 2017

QFYW2. Thinking about food scraps such as fruit and vegetable peelings, how often does your household dispose of them in each of the following ways?
(Base: All respondents, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500)

Means of Composting

Multiple Responses



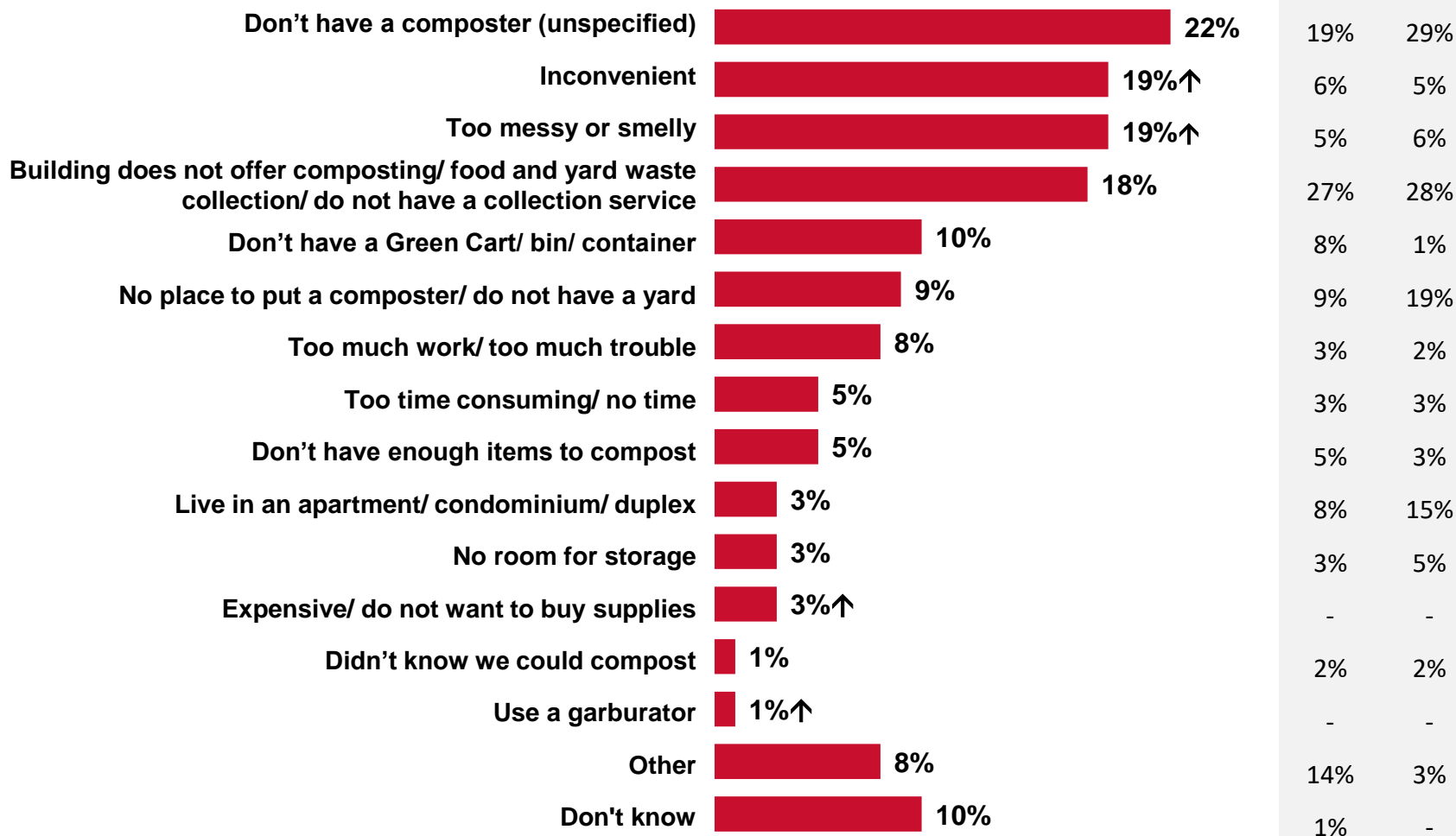
**New question in 2019*

QFYW2C. How or where does your household currently compost these types of items?

Base: Respondents who composted always, most of the time or once in a while (n=491)

Reasons for Not Composting Food Scraps

Multiple Responses

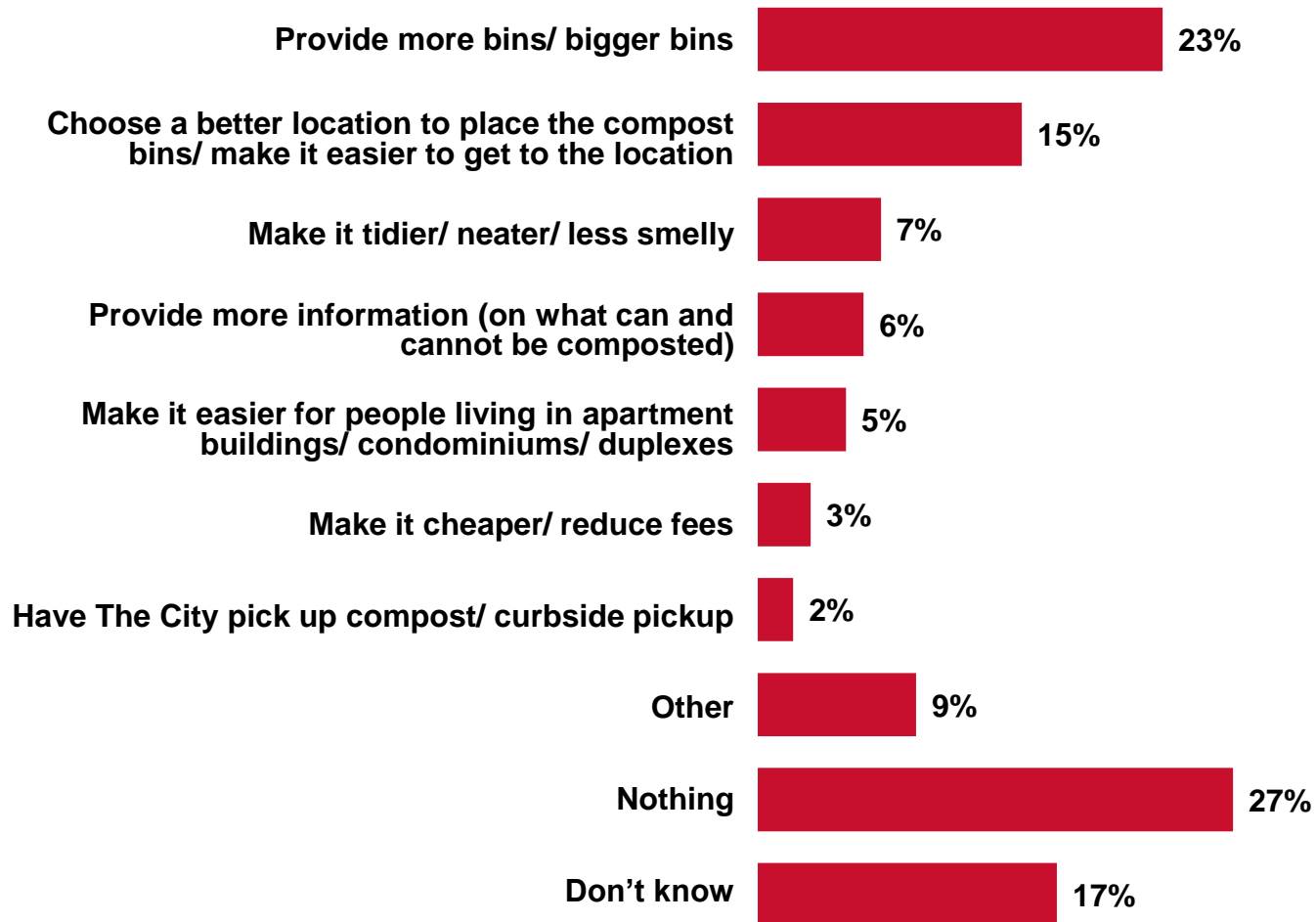


↑Statistically higher than 2017
↓Statistically lower than 2017

QFYW3. What are the main reasons you do not compost food scraps and/or fruit and vegetable peelings?
(Base: Never compost food scraps: Nov 16: n=410, Nov 17: n=236, Oct 19: n=137)

What Would Make it Easier For You to Compost

Multiple Responses



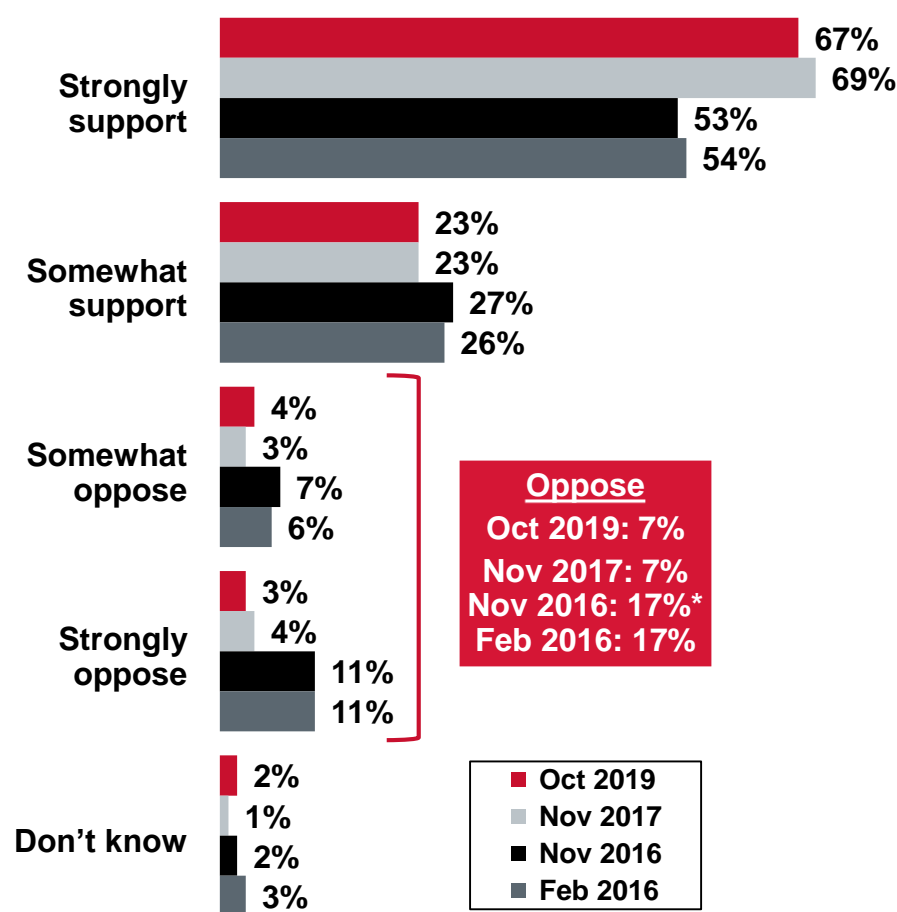
**New question in 2019*

QFYW3C: What would make it easier for you to compost? What would have to happen to make it easier for you to compost?
(Base: All respondents, n=500)

Support for a Multi-Family Food and Yard Waste Program

As you may know, since November 1, 2017, all multi-family complexes have been required to separate food and yard waste from garbage for composting.

[IF NECESSARY] The goal of the program is to divert food and yard waste from landfills through composting or other means of recycling. The program must accept household items such as food scraps, like vegetable or fruit peelings, meat, bones and dairy, food soiled paper, such as paper plates and napkins, and yard waste. **



Support

Oct 2019: 91%*
Nov 2017: 92%
Nov 2016: 81%*
Feb 2016: 80%

Oppose

Oct 2019: 7%
Nov 2017: 7%
Nov 2016: 17%*
Feb 2016: 17%

■ Oct 2019
■ Nov 2017
■ Nov 2016
■ Feb 2016

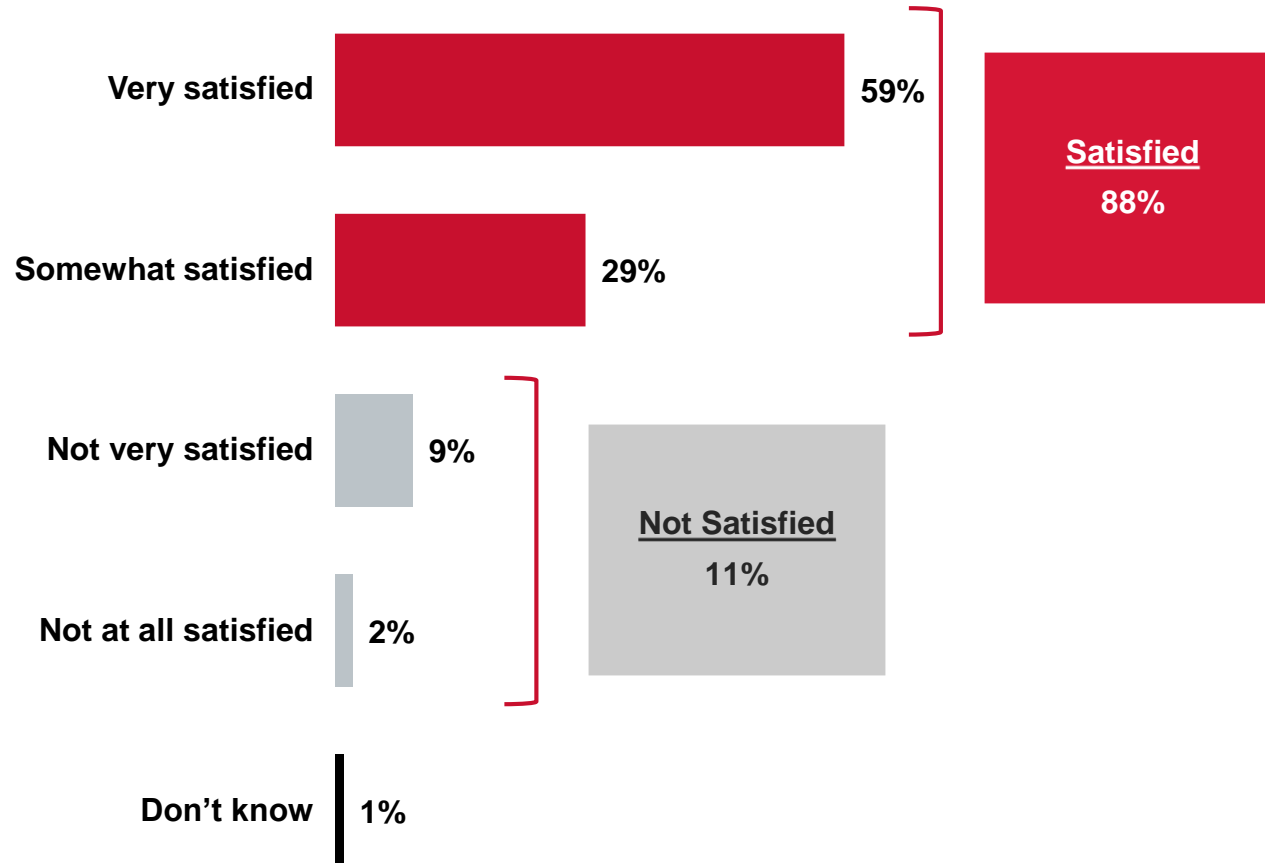
** Note: question changed slightly in 2019.

Q20A. Do you personally support or oppose the multi-family food and yard waste requirements?

(Base: All respondents, Feb 16: n=502, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500)

*Rounding

Satisfaction with Multi-Family Residential Complex's Composting Services



**New question in 2019*
 QFYW4Z. Overall, how satisfied are you with your complex's composting services?
 (Base: Respondents whose complex provides composting collection or services, n=323)



Multi-Family Waste Diversion Communications



Summary | Source of Awareness of On-Site Waste Diversion Programs



Just over one-half say their building owner, manager, landlord or condo association informed them about the multi-family recycling and food and yard waste programs.

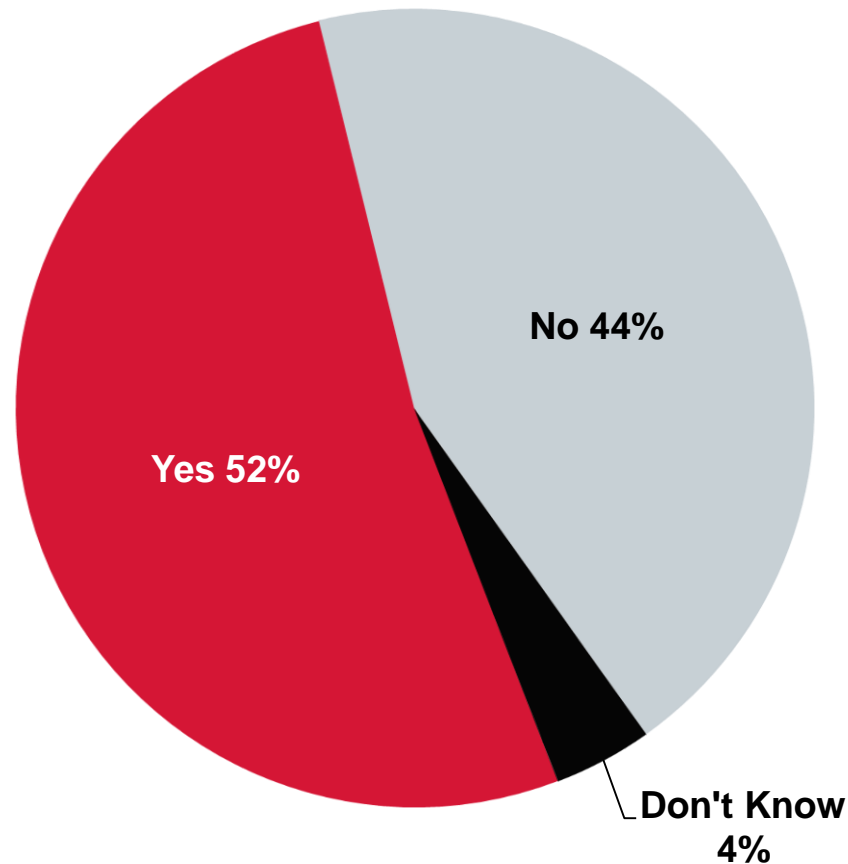
- Overall, 52% of multi-family residents say they were informed about their building's recycling and composting programs by their building owner, manager, landlord or condo association.
 - Those living in condominiums are more likely than those living in townhouses/rowhouses to say they were informed about the programs (62% vs. 43%).



Multiple sources of information are informing multi-family residents about recycling and composting programs.

- Multi-family residents have heard about the multi-family recycling and food and yard waste programs most commonly through traditional media, such as television (21%), newspapers (11%) and radio (6%).
- Word-of-mouth continues to a main source of awareness (13%).
- City sources of awareness include mailed post cards/letters/brochures from The City (8%) and The City's website (6%).

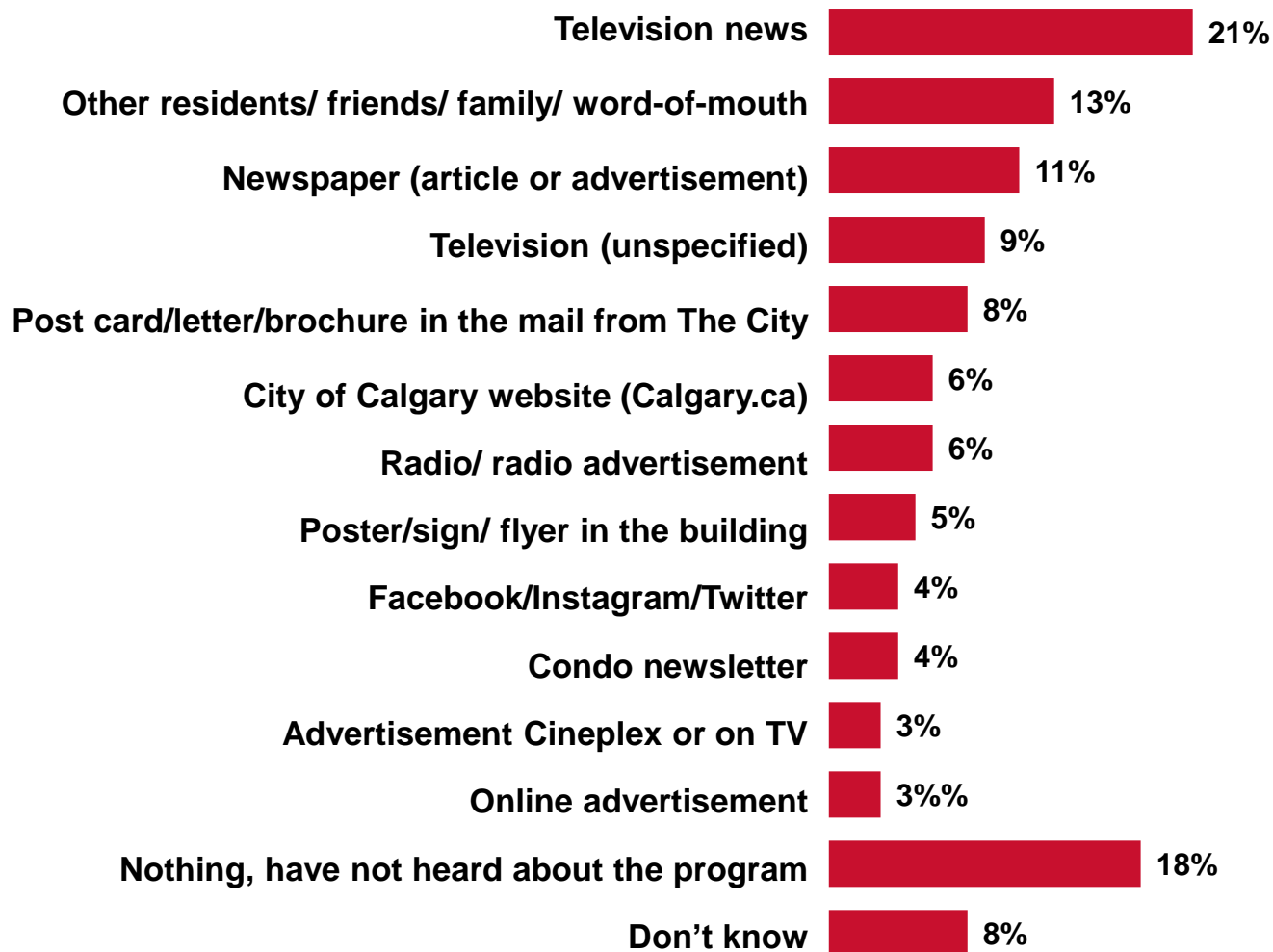
Incidence of Complex Informing Residents about Recycling and Composting Programs



QFYW5a1. In the past 12 months, has your property manager, condo association or landlord informed you about the recycling and composting programs at your complex?
(Base: All respondents n=500)

Question wording changed in 2019.
Direct tracking is not possible.

Source of Awareness of Multi-Family Recycling and Composting Programs



Mentions of >2% are not shown

Question changed in 2019. Direct tracking is not possible.

QFYW5a. How or where else have you heard about the requirements for multi-family complexes to have recycling and composting programs in place?
(Base: All respondents: n=500)



Attitudes Towards Waste Reduction





Multi-family residents are in strong agreement that the amount of waste going to landfills should be reduced. Attitudes towards the impact of waste reduction and landfills are similar to 2017.

- There is a definite consensus (95% agree) that 'it is important to reduce the amount of household waste going to landfills' (on par with 94% in 2017) and more than three-quarters (78%) 'strongly' agree with this sentiment.
- Most multi-family residents (81%) agree that 'The City of Calgary should do more to reduce the amount of household waste going to landfills' (on par with 79% in 2017). Almost one-half (48%) 'strongly' agree with this statement, also similar to results in 2017 (49%).
- Two-thirds (66%) agree that 'when food and yard waste breaks down in landfills, it results in the release of greenhouse gases which are harmful to the environment' (consistent with 68% in 2017), including 35% who are in 'strong' agreement (similar to 38% in 2017).
- Further, 57% of multi-family residents agree that 'disposing of food and yard waste in landfills is okay because it's biodegradable and breaks down over time' (on par with 55% in 2017). A smaller proportion (23%) 'strongly' agree with this statement, similar to 26% in 2017.

Summary | Attitudes Towards Waste Diversion



There is a strong desire for individuals to divert more waste. The majority of multi-family residents are organizing their homes to make waste diversion easier and buildings could be providing more informative composting signage.

- A series of new attitudinal statements were added in 2019.
- The vast majority (95%) of multi-family residents believe that 'individual citizens should do more to reduce the amount of household waste going to landfills', including a majority (71%) who 'strongly' agree with this notion.
- In addition, 77% agree that they 'have separate recycling and composting stations in their household to make it easy to do', including 60% who are in 'strong' agreement, and 63% believe that their 'building provides adequate signage to inform residents about composting services and how they work' (with 39% in 'strong' agreement).



One-half of multi-family residents are skeptical that recycling and composting will ultimately end up in the landfill and roughly two-in-ten say it's not worth the effort, is an added expense and that they don't know enough about it to do it confidently.

- Multi-family residents are not entirely sure what happens to recycling and composting, with 52% agreeing that 'a lot of what is recycled and composted just ends up in the landfill anyway'.
- From a personal perspective, 23% of multi-family residents feel that 'recycling and composting takes too much time and effort', 22% 'don't know enough about recycling and composting to feel confident enough to do it' and 19% feel that 'recycling and composting is just another added expense they don't need'.

Attitudes | Waste Reduction and Landfills

% Agree

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

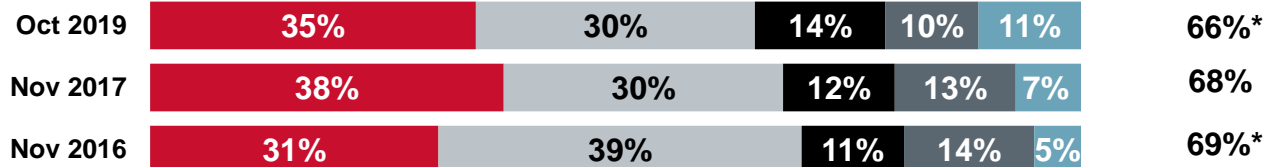
It is important to reduce the amount of household waste going to landfills



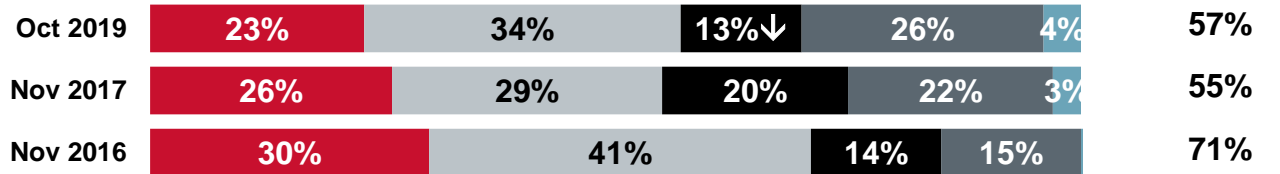
The City of Calgary should do more to reduce the amount of household waste going to landfills



When food and yard waste breaks down in landfills, it results in the release of greenhouse gases which are harmful to the environment



Disposing of food and yard waste in landfills is okay because it's biodegradable and breaks down over time



<3% are not labelled

*Rounding

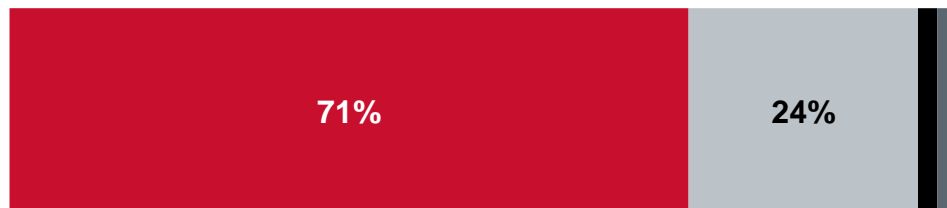
QFYW6. Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements. (Base: All respondents, Nov 16: n=501, Nov 17: n=500, Oct 19: n=500)

Attitudes | Individual Effort and Ease-of-Use

% Agree

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

Individual citizens should do more to reduce the amount of household waste going to landfills



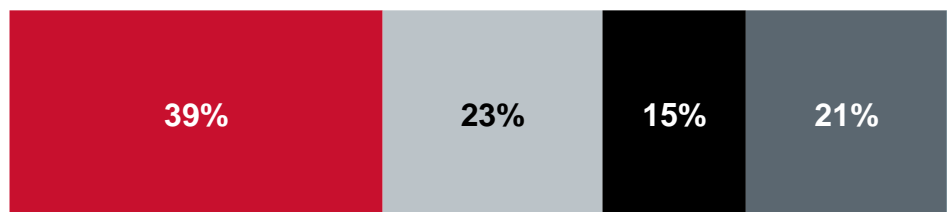
95%

I have separate recycling and composting stations in my household to make it easy to do



77%

My building provides adequate signage to inform residents about our composting services and how they work



63%*

<3% are not labelled

QFYW6. Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements. (Base: All respondents, n=500)

*Rounding

Attitudes | Personal Perspectives of Waste Reduction

% Agree

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

I think that a lot of what is recycled and composted just ends up in the landfill anyway



52%

Recycling and composting takes too much time and effort



23%

I don't know enough about recycling and composting to feel confident enough to do it



22%*

Recycling and composting is just another added expense I don't need



19%*

<3% are not labelled

QFYW6. Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements. (Base: All respondents, n=500)

*Rounding



Key Driver Analysis: **Factors Influencing the Frequency of Waste Diversion**



Summary | Key Driver Analyses



The Ipsos Bayes Net (IBN) Drivers Platform is an advanced key driver platform based on Bayesian statistics which allows us to understand the impact of factors on the frequency of recycling or composting.

Recycling | The most influential factors in encouraging higher frequency of recycling include:

- Having separate recycling and composting stations in the residence;.
- The feeling that individuals 'should do more to reduce the amount of waste going to landfills'; and,
- The belief that 'It is important to reduce the amount of household waste going to landfills'.

BUT, some factors have a negative influence on recycling behaviours:



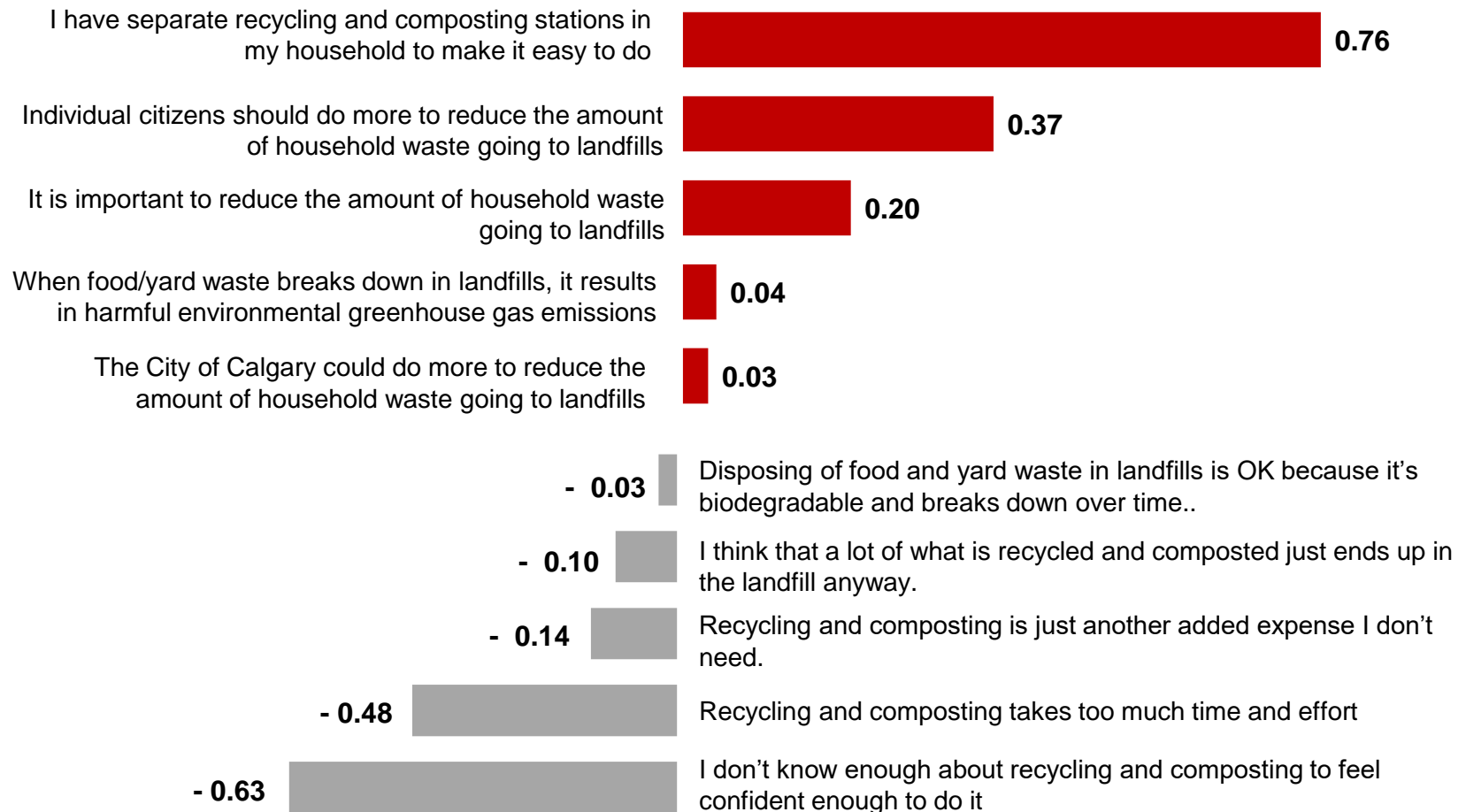
- Not knowing enough about waste management diversion to feel confident to do it; and,
- The feeling that recycling and composting takes 'too much time and effort'.

Composting | The most influential factors in encouraging higher frequency of recycling include:

- Having separate recycling and composting stations in the household to 'make it easy to do', followed by a distant second factor of their building providing adequate signage to inform residents about composting services.
- The third most influential factor is the key message that 'individual citizens should do more to reduce the amount of household waste going to landfills'.
- **Influences that DETRACT** from frequent waste diversion behaviours include: sentiments that 'recycling and composting takes too much time and effort' and that multi-family residents 'don't know enough about recycling and composting to do it'.

Key Drivers Influencing the Frequency of Recycling

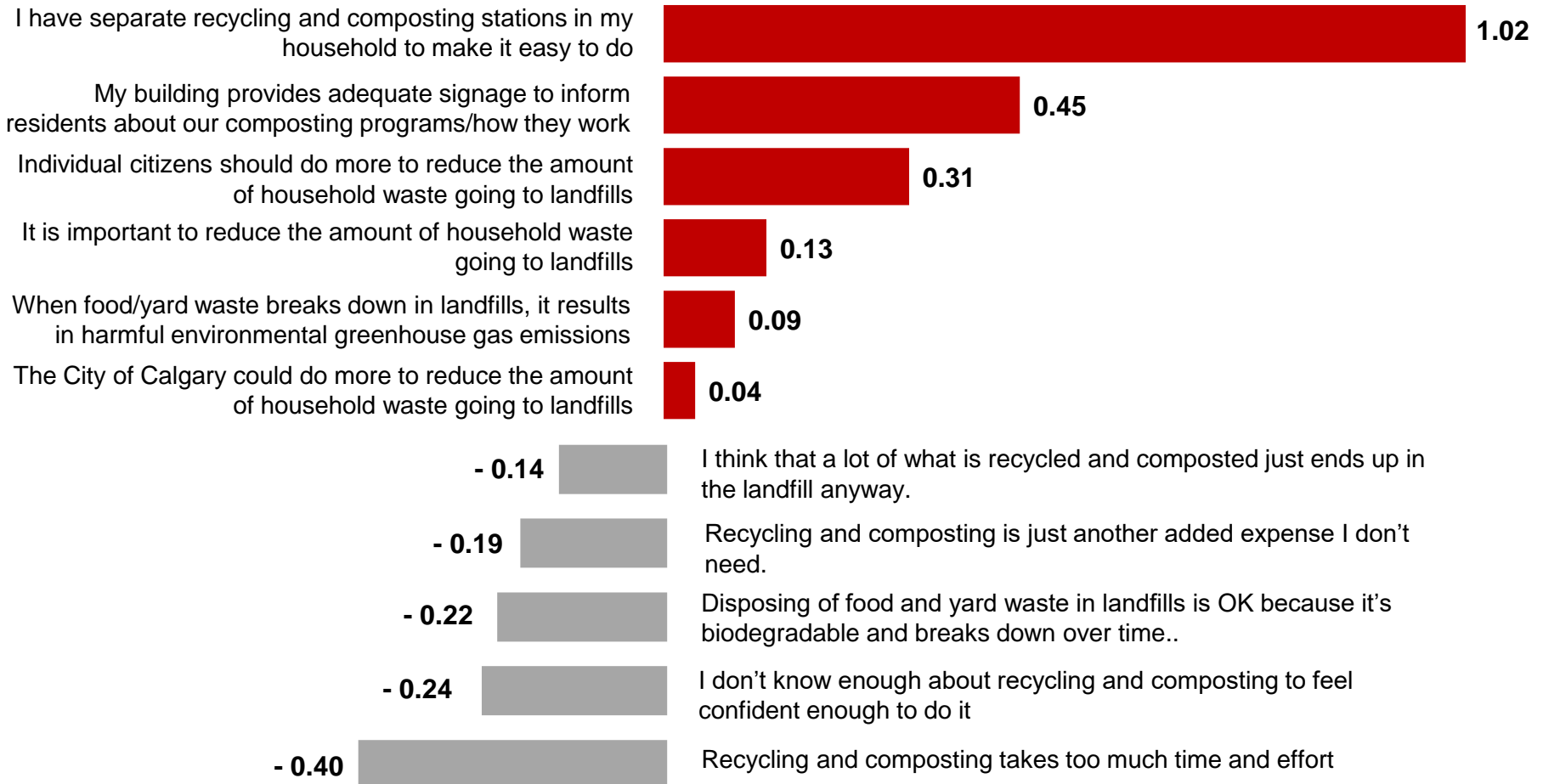
The relative impact of each of the following factors upon the frequency of recycling is presented below. Items associated with the red bars positively influence the frequency of recycling (i.e. are motivators to encourage multi-family residents to recycle more frequently). Items associated with the grey bars negatively influence the frequency of recycling (i.e. are barriers discouraging multi-family residents to recycle more frequently).





Key Drivers Influencing the Frequency of Composting

The relative impact of each of the following factors upon the frequency of composting is presented below. Items associated with the red bars positively influence the frequency of composting (i.e. are motivators to encourage multi-family residents to compost more frequently). Items associated with the grey bars negatively influence the frequency of composting (i.e. are barriers discouraging multi-family residents to compost more frequently).





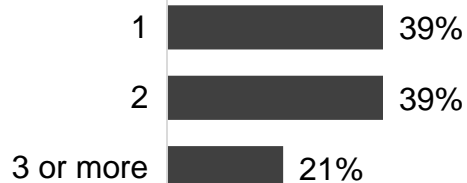
Demographics



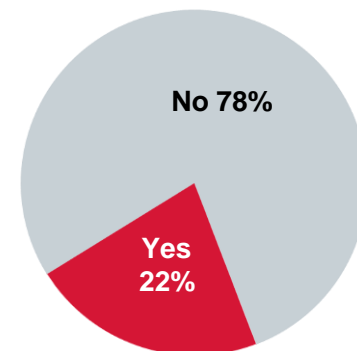
Quadrant

Southwest	50%
Southeast	15%
Northwest	20%
Northeast	15%

Number of People living in Household



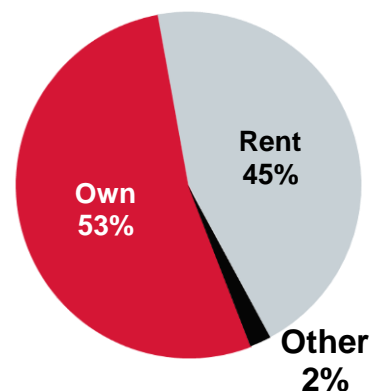
Children in Household



Type of Home

Condominium	37%
Apartment	35%
Townhouse	23%
Mobile Home park or Trailer park	3%
Rowhouse	2%

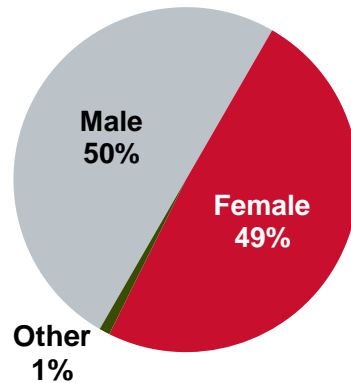
Own or Rent



(Base: All respondents, n=500)

Demographics

Gender



Age

18 to 24	15%
25 to 34	25%
35 to 44	12%
45 to 54	13%
55 to 64	9%
65 or older	25%
Mean	46 years

Education

Completed high school or less	18%
Some post secondary or college diploma	30%
Completed university degree or post-grad degree	52%
No response	1%

Income

Less than \$40,000	18%
\$40,000 to <\$60,000	14%
\$60,000 to <\$80,000	15%
\$80,000 to <\$100,000	11%
\$100,000 to <\$120,000	11%
\$120,000 to <\$140,000	5%
\$140,000 or more	10%
No response	15%

(Base: All respondents, n=500)

Contact

Erin Roulston

Vice President
Ipsos Public Affairs
403-919-5609
email: erin.roulston@ipsos.com

Jessica Weber

Account Manager
Ipsos Public Affairs
403-612-7353
email: jessica.weber@ipsos.com