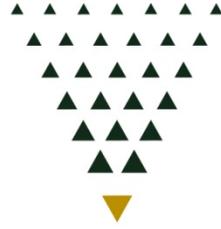


ATTACHMENT 1:
Executive Summary



V E R N O N
RESEARCH GROUP

Executive Summary

County Residents and Business Sector Recycling and Composting Behaviors, Perceptions and Preferences

SolidWaste
Cedar Rapids ▲ Linn County
Agency
living. together. **green**

April 2014

Introduction

The Cedar Rapids/Linn County Solid Waste Agency (the Agency) contracted with Vernon Research Group to conduct a market research study with individuals and business decision-makers in the County. The Agency wanted to gain a comprehensive picture of awareness, perceptions and usage of the Agency that will serve as a baseline for future trending and tracking.

The research objectives included:

- ▼ Assess awareness and understanding of the Agency and its services
- ▼ Reveal perceptions of the Agency and its services/programs
- ▼ Measure overall behaviors with regard to recycling/composting/waste diversion
- ▼ Identify usage of specific Agency services and programs
- ▼ Pinpoint challenges to recycling or composting
- ▼ Identify information sources used and trusted by residents/businesses with regard to recycling and composting programs

The study was conducted using an online survey. Because the Agency was interested in measuring community awareness, it was conducted blind, and the Agency did not conduct any public relations efforts to invite citizens into the study. Vernon Research Group utilized various data collection strategies, including fielding the survey with Iowa Opinion Panel members residing in Linn County, utilizing available business lists and using social media and online advertising to invite participation. A drawing was conducted for the resident survey, and participants in the business survey were each awarded a \$20 gift card.

The surveys were completed between September 26 and December 4, 2013, resulting in 444 quality completes for individuals and 219 quality completes for businesses.

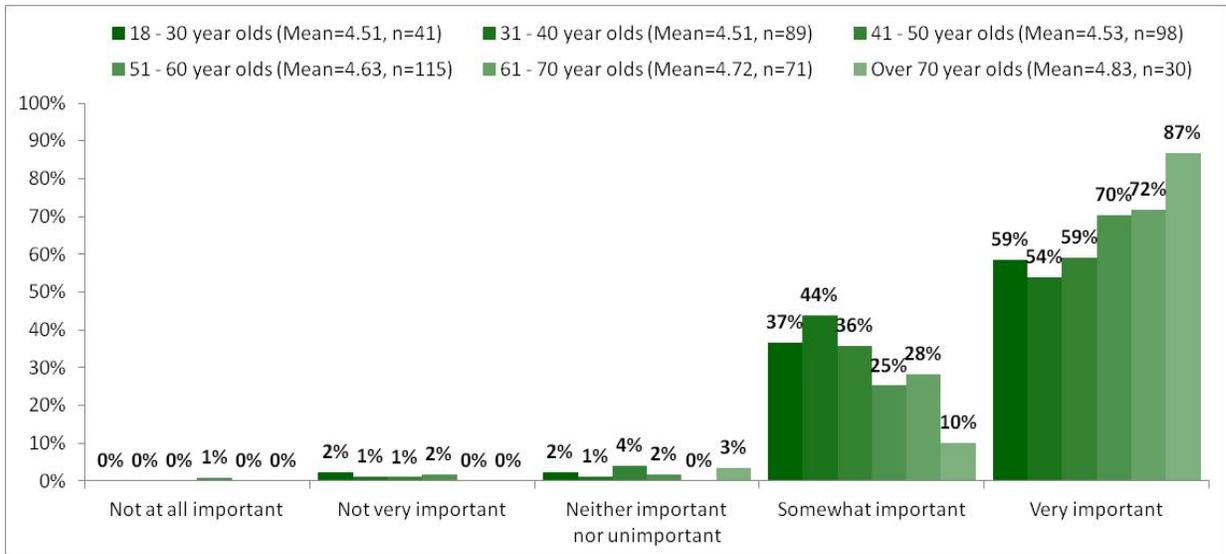
Residents of Linn County aged 18 and older who were knowledgeable regarding their households' or business'/property's waste and recycling habits qualified to take the survey.

Recycling and Composting in Linn County: 8 Key Takeaways

I. The great majority of individuals and businesses are recycling.

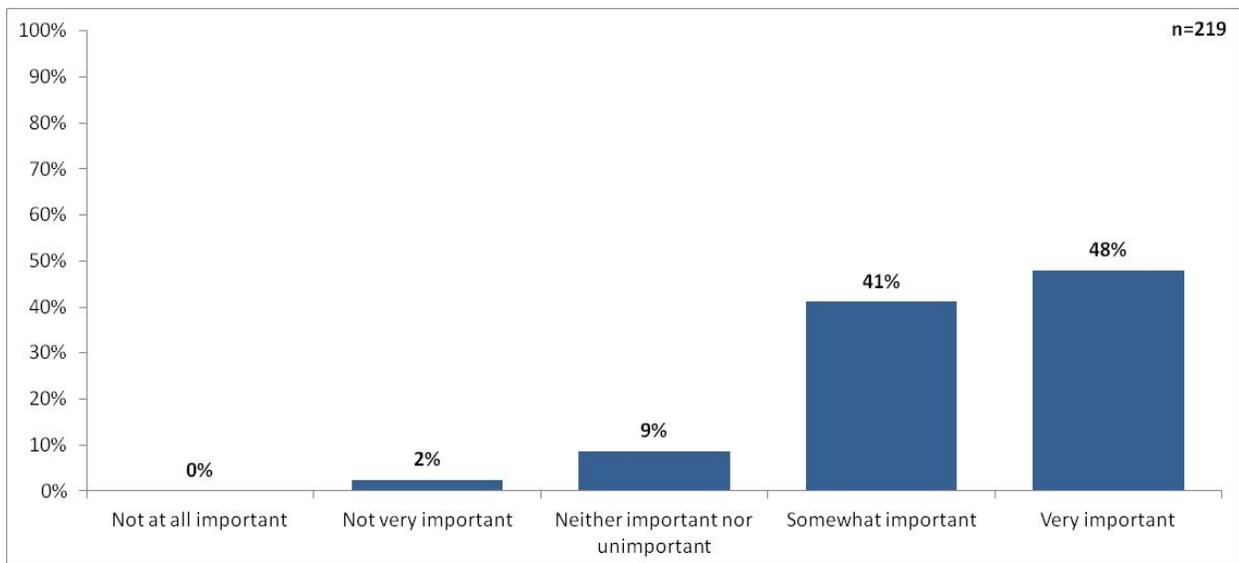
The study revealed a strong value for recycling in Linn County for both households and businesses. Most are motivated simply because “it’s the right thing to do.” The rate of importance for recycling increased with age for individuals. It was also slightly stronger among individuals than among businesses.

Individuals:



Q6. How important is recycling to you?

Businesses:



Q1. How important is recycling to your organization?

Respondents' high value for recycling translates into behaviors, with:

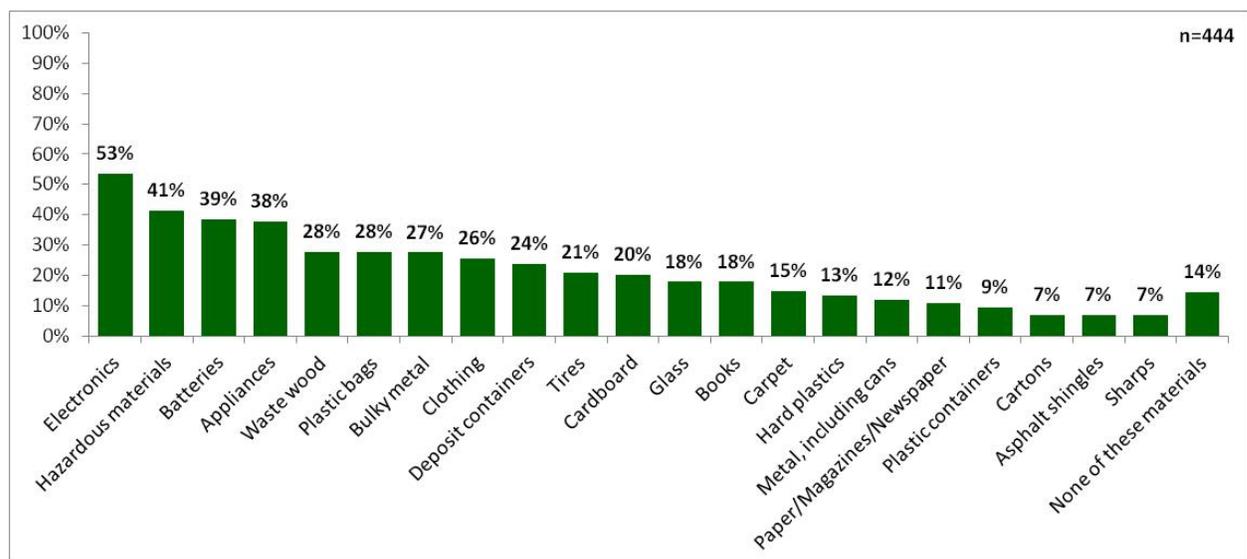
- ▼ **86% of individuals** reporting they recycle at least one material at home and/or use public recycling drop-off sites for at least one material
- ▼ **95% of businesses/properties** reporting they have recycling services for at least one material onsite and/or take at least one material to drop-off sites
- ▼ **28% of individuals** reporting they bring recyclables from work to recycle at home

II. Households and businesses are recycling a range of materials.

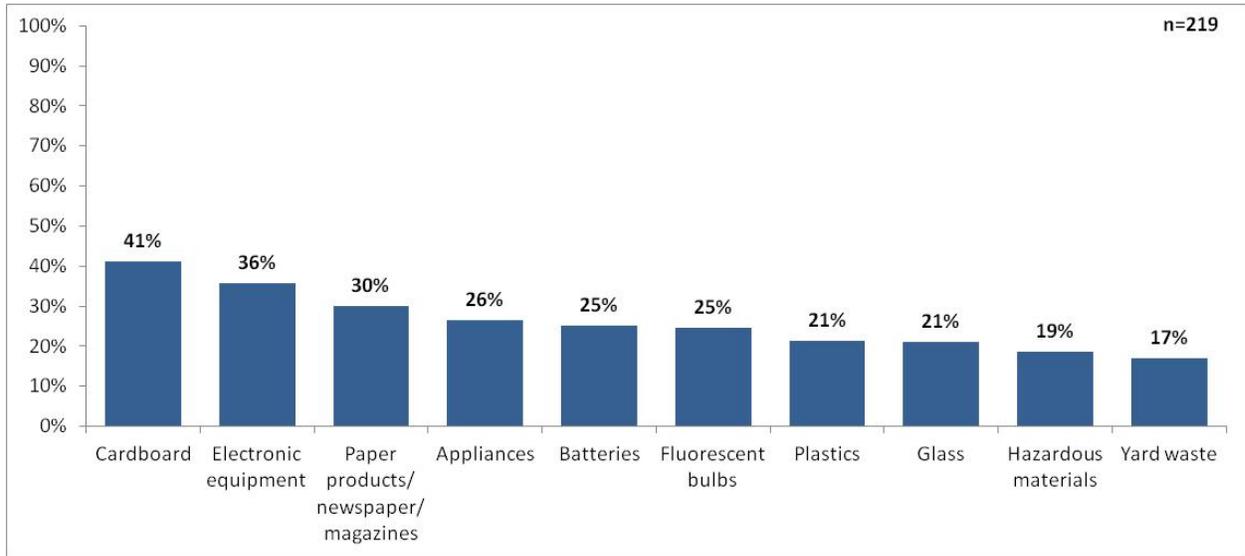
Almost all materials have some percentage of people recycling them. Only 7% of individuals reporting no recycling receptacles available at their residence and only 6% of businesses reporting no recycling receptacles of any kind on-site.

- ▼ The most common items recycled on-site are paper products, cardboard, beverage containers, plastics and (for individuals) glass.
- ▼ The most common items that households recycle at public drop-off sites are electronics, hazardous materials, batteries and appliances.
- ▼ Businesses most frequently bring cardboard, electronics and paper products to drop-off sites.
- ▼ Low recycling rates for medical/sharps - least likely material to have recycling receptacles at businesses and only 7% of households bring to drop-off sites.

Individuals: Materials recycled at drop-off sites:

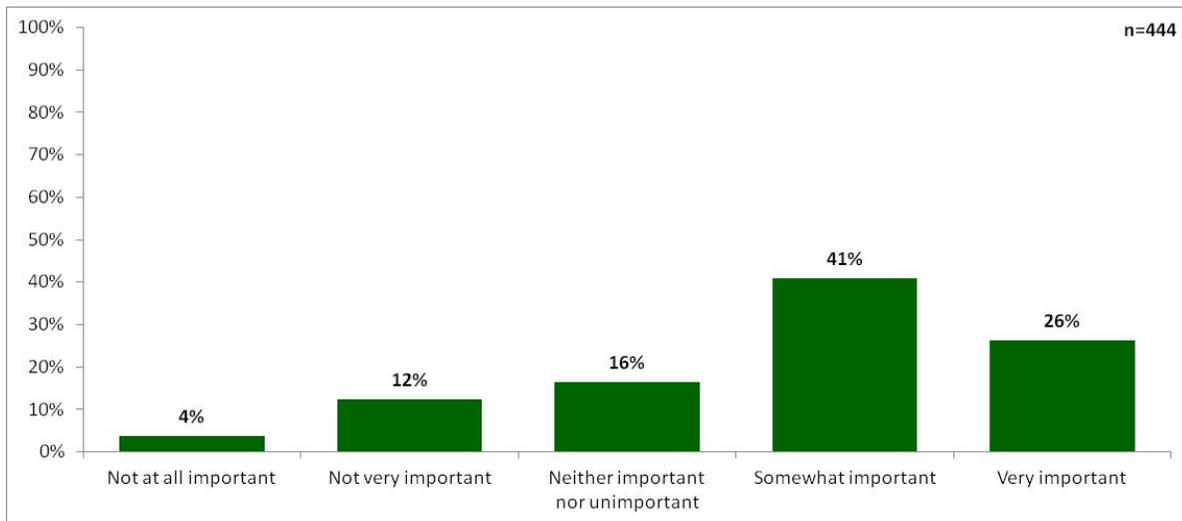


Business: Materials recycled at drop-off sites:



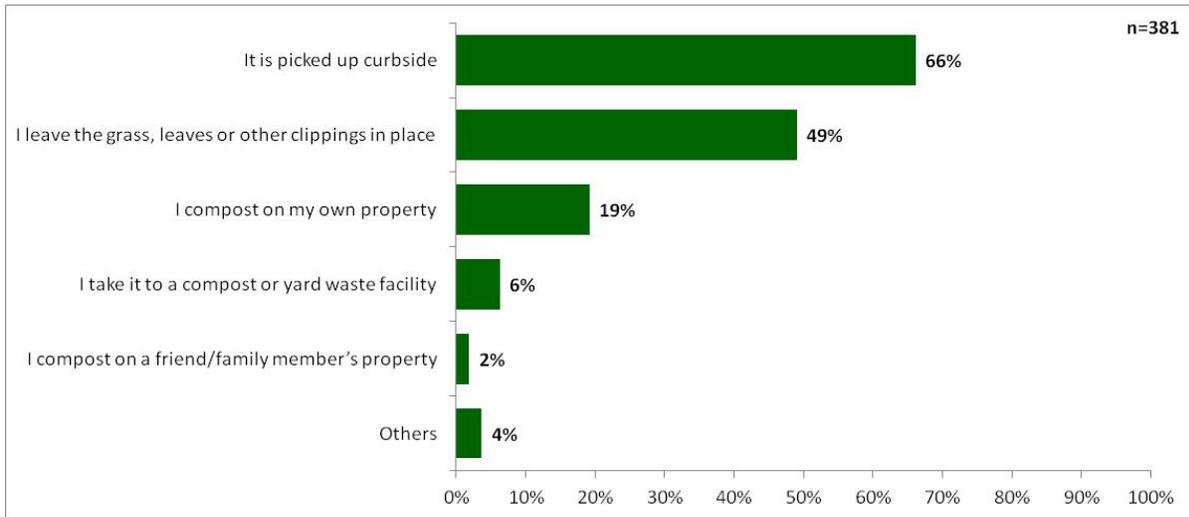
III. Composting is seen as important, but not as strongly as recycling, and behaviors reflect this.

While two-thirds of individuals value composting, one-third are either neutral or consider it not important.

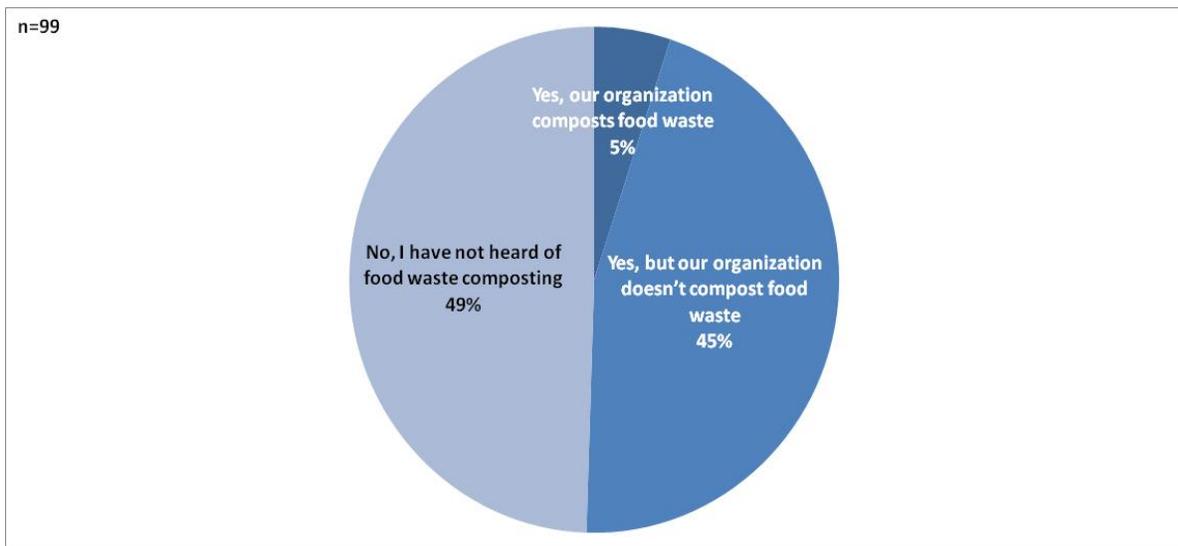


Q7. How important is keeping food waste out of your trash?

The majority of people put their food waste in with regular garbage or down the disposal, but many put it in with their yard waste or compost (19%) on their own properties.

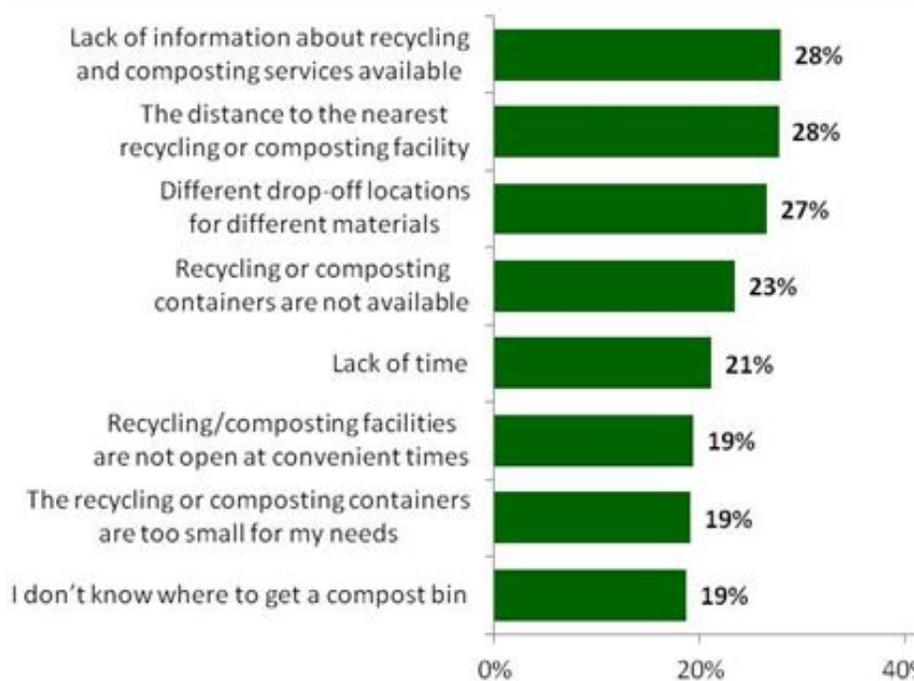


In the business survey, businesses that generate food waste either have not heard of food waste composting opportunities or have decided not to participate. Only 5% reported composting.

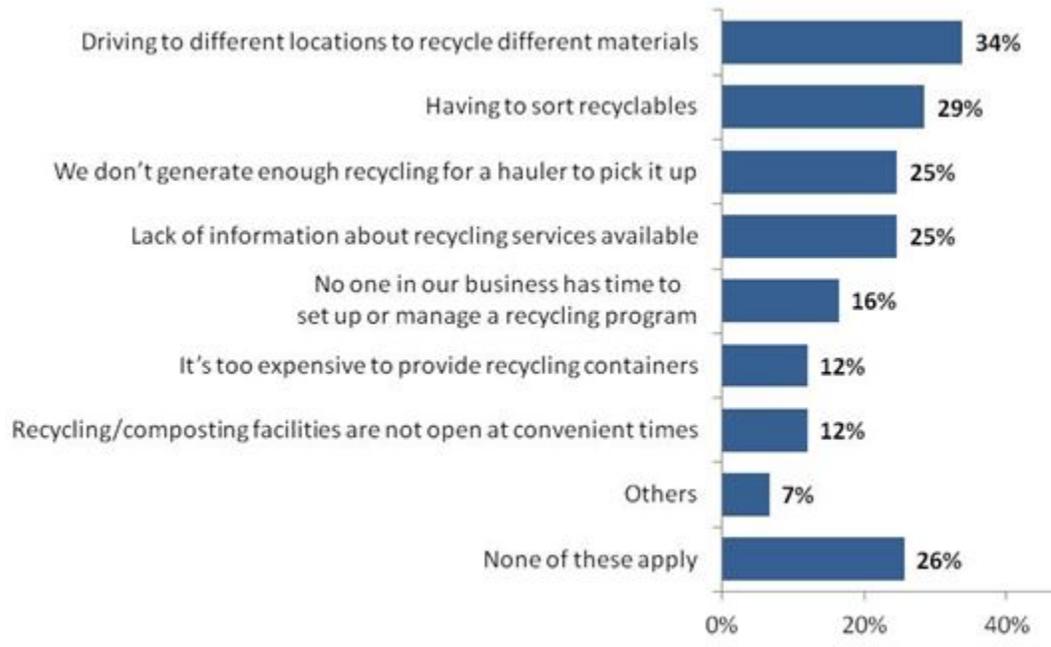


IV. The main challenges to recycling more involve lack of information or convenience issues. In addition, the unavailability of recycling containers hinders about 25% of households and businesses.

Top challenges for households:



Top challenges for businesses:



V. More than half of households and businesses are unaware of or misperceive the services and programs that Cedar Rapids/Linn County Solid Waste Agency provides to the County.

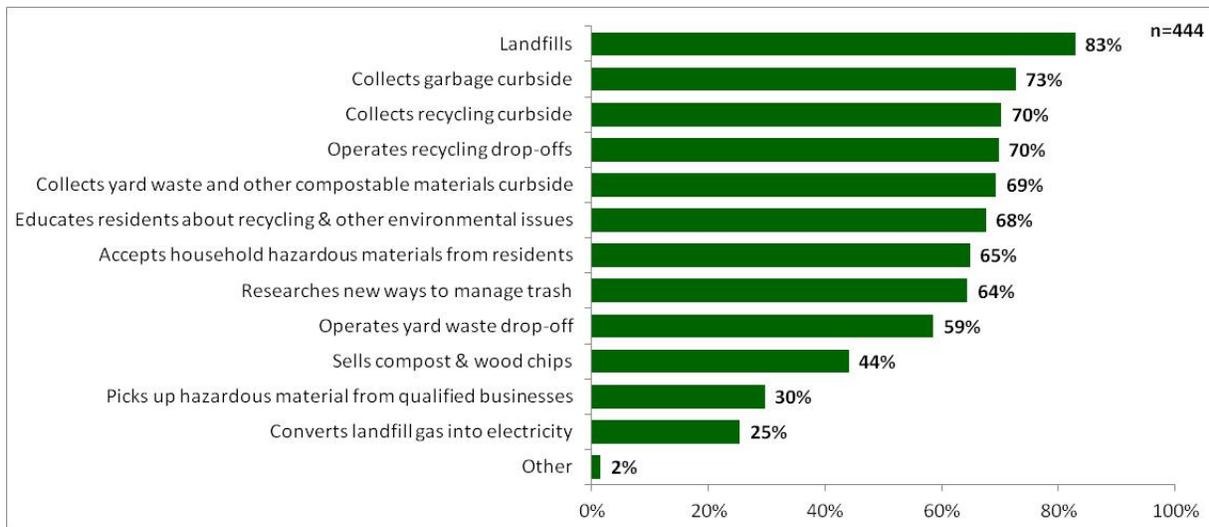
What more than half know:

- ▼ Agency runs the landfill
- ▼ Accepts hazardous waste, yard waste and operates recycling drop-off locations
- ▼ Educates residents and businesses

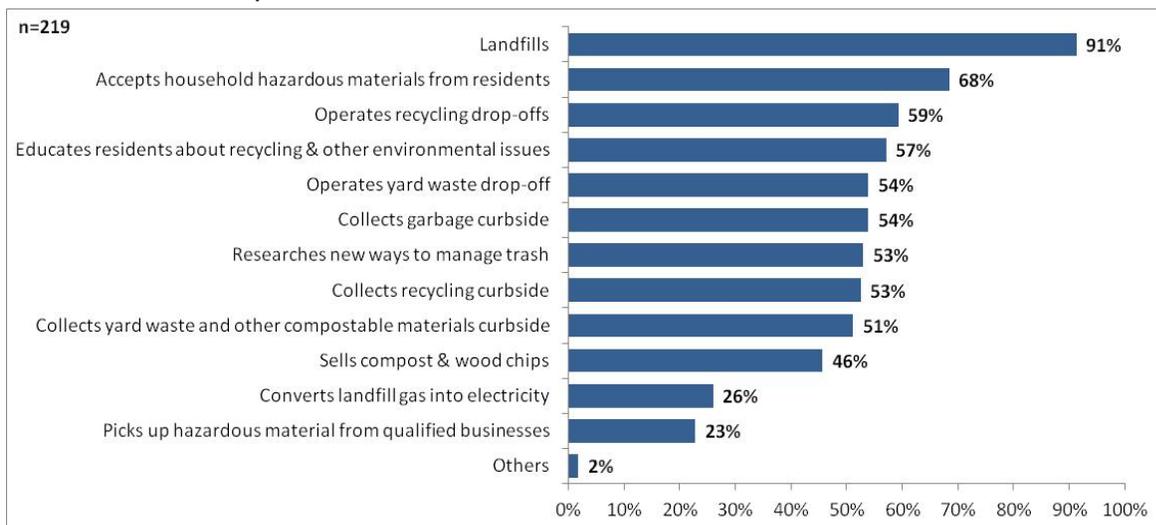
What more than half don't know or misunderstand:

- ▼ Agency collects garbage, recycling and yard waste curbside from homes and businesses (it does not)
- ▼ Lower awareness of compost sales, landfill gas conversion to electricity and some specialty programs (e.g., shingle recycling, sharps drop-off)

Individuals' Perceptions:



Business's Perceptions:



When survey respondents were asked the question, “In Linn County, which organization is responsible for providing leadership in recycling and other landfill diversion programs?” 132 of the 444 participants in the individual survey were able to articulate at least part of the full name, with seven getting it completely accurate. In the business survey, 97 of 219 got some part of the name correct (nine were exact).

The majority of people have, however, interacted in some manner with the Agency. **61% of business respondents and 70% of individual respondents** have experienced direct or indirect contact, with the three most popular methods being:

- ▼ Visiting Agency website
- ▼ Receiving Agency information in the mail
- ▼ Making a phone call to the Agency

VI. Individuals and businesses in Linn County have a positive impression of the Cedar Rapids/Linn County Solid Waste Agency and consider it a resource for information on recycling and environmental topics.

The Agency was listed as the first source of information for 58% of individuals and 53% of businesses, followed by a general Internet search. When asked what methods of information they are likely to use to learn about recycling and waste reduction, 63% of individuals and 59% of businesses prefer online sources, such as Internet search engines or specific websites. Surprisingly, 44% of individuals and 32% of businesses selected information mailed to their home or business, making it the second most popular method. All other methods were well below these top two.

When asked for their opinions of the Cedar Rapids/Linn County Solid Waste Agency and its programs, the majority had positive comments, with a quarter having no opinion or neutral. (Respondents wrote in comments which were categorized.)

Individuals' Responses

Categories	Frequency
Positive	239
Don't know/no opinion	86
Communication lacking	53
Needs improvement	30
Neutral	24
Other	24
Keeps us informed	19
Expensive	15
Negative	10

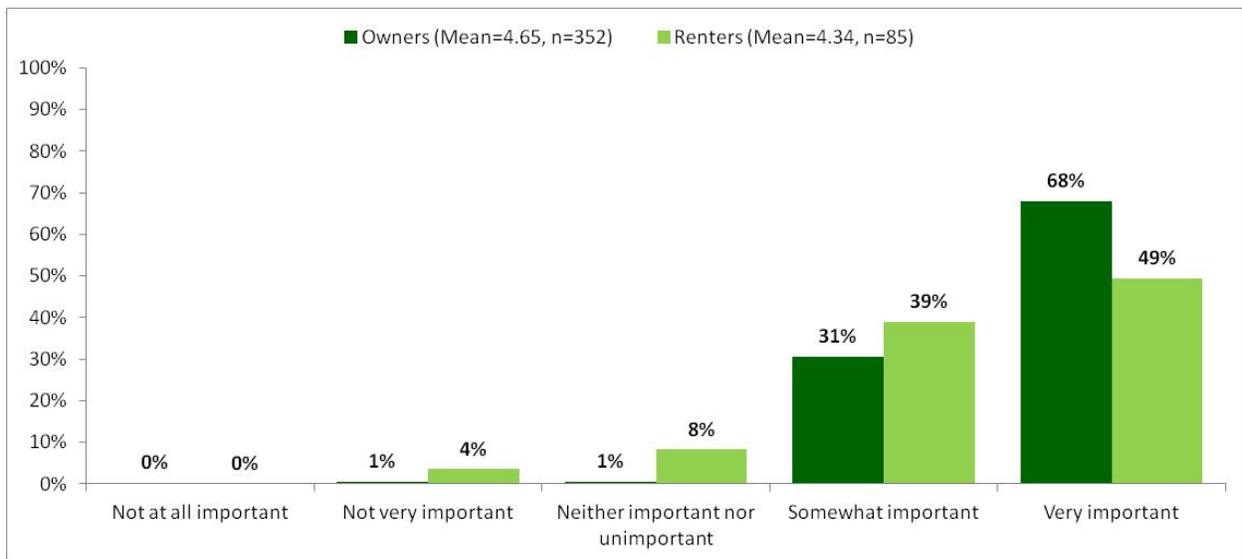
Business's Responses

Category	Frequency
Positive	112
Don't know/no opinion	48
Communication lacking	29
Needs improvement	18
Other	17
Negative	12
Neutral	8

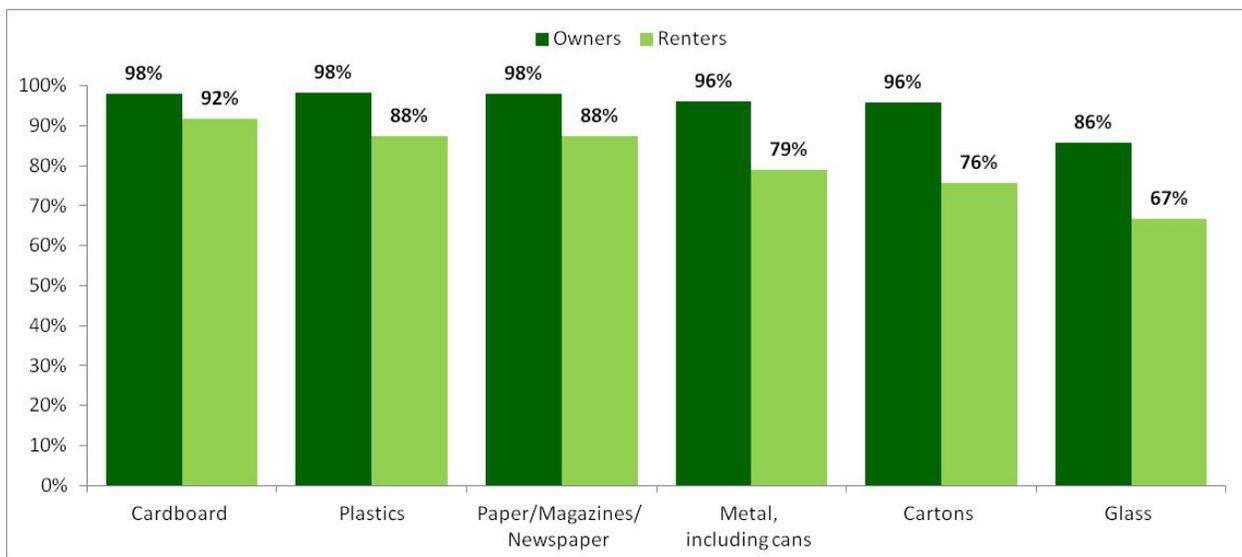
VII. Renters recycle less than owners, but most of that is due to lack of receptacles at their residence. They value recycling almost as much as owners but not as strongly.

Almost a third (29%) of renters said they do not have the ability to recycle any materials where they live, neither curbside nor via a special dumpster.

Recycling importance for owners and renters:



Recycling behaviors for owners and renters with recycling available on-site:



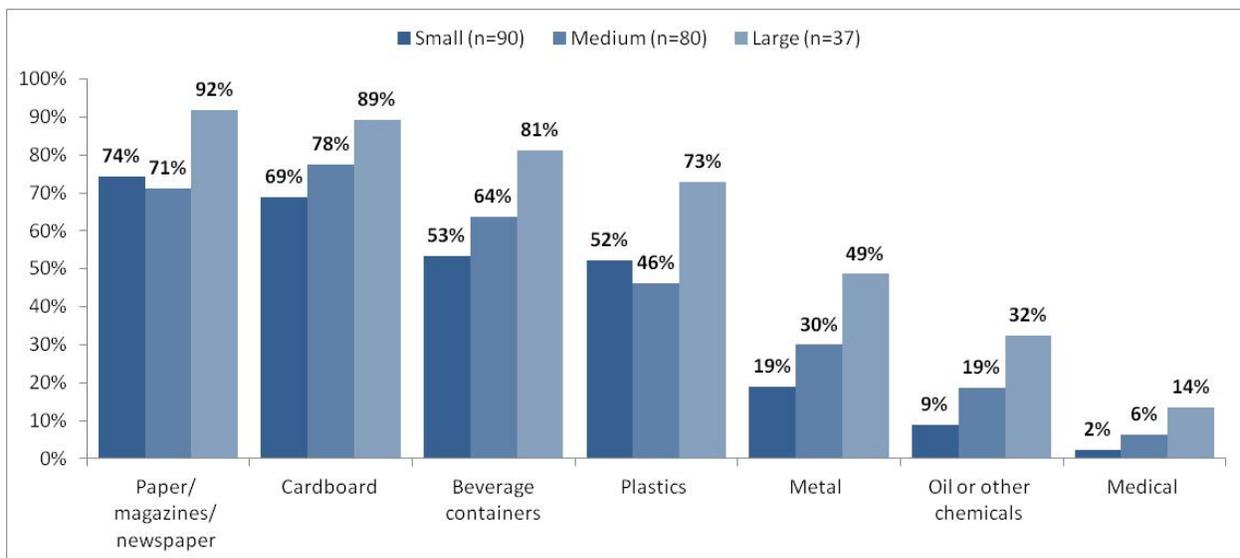
VIII. Small businesses have more challenges to recycling.

Probably because of the larger variety and amounts of waste generated by larger businesses (which, in Linn County, are often manufacturing facilities), there were some statistically significant differences between smaller and larger businesses.

Smaller businesses were:

- ▼ Much less likely to rate recycling as highly important to their organization
- ▼ Much less likely to recycle because of cost savings, industry regulations/practices or customer influence
- ▼ More likely to not recycle because they don't generate enough for a hauler to pick up
- ▼ Most likely to have dropped off electronics
- ▼ Least likely to use the Agency and more likely than others to use Internet search engine to learn about recycling programs in the area
- ▼ Less knowledgeable than larger businesses about some of the Agency's services and programs (e.g., operating yard waste drop-off, converts landfill gas into electricity)

Recycling Availability by Business Size:



Recommendations

There are additional and more specific recommendations in the full reports for these two studies. Following are the overall key recommendations – they are offered with the understanding that there may not be budget and staff to accomplish them all.

- ▼ Increase frequency and specificity of communications to both households and businesses to increase awareness and understanding of the Agency’s services and programs, including what materials are banned from the landfill and what materials can be recycled at drop-off sites. For example, 58% of businesses did not know cardboard is banned. (Most are, however, either recycling on-site or bringing to drop-off sites.)
 - Help residents and businesses understand what the Agency does and what local city or town waste collection services do
 - Highlight one material at a time or in a specific campaign, so people can absorb and retain the information
 - Position Agency as County expert and authority on these issues (believable)
- ▼ Work with private waste haulers and recyclers to increase access to recycling for residents of rental properties and businesses (especially small businesses).
- ▼ Prioritize resources to ensure maximum use and effectiveness of online presence:
 - Search engine optimization and marketing
 - Ongoing content development for website
 - Front page access to most frequently requested information
- ▼ Consider keeping or adding information piece(s) that can be mailed to homes and businesses and have a long shelf life (e.g., Recycling Companion, a magnet that lists materials accepted by drop-off sites and/or banned from landfill).
- ▼ Develop and execute a “Renter” initiative, focusing on communications and ways to reduce barriers that include lack of receptacles, frequency of service and lack of transportation to drop-off sites. Consider neighborhood mini drop-off sites for most commonly recycled materials. Target younger people for information on electronics recycling.
- ▼ Initiate a “Small Business” initiative that familiarizes small businesses with Agency services and locations and looks for ways to facilitate increased recycling. Investigate opportunities to connect small businesses with private recyclers and other businesses that can utilize waste materials. Encourage or incentivize private haulers to consolidate small businesses into “batch” recycling routes to expand access to recycling services.
- ▼ Invest in ways to highlight and reward individuals and businesses for recycling and composting (e.g., annual awards, feature in online or media stories).