



Oregon Education & Outreach

Update – Audience Research

Presentation to the ORSAC
E&O Committee

October 2, 2024

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Agenda

1. Team Introductions
2. Oregon Audience Research Findings
3. Questions

Oregon Quantitative Research

Overview

Research Objectives

Baseline

- **Establish the baseline:** Baseline data will be used for future assessments of the E&O campaign. Data gathered include awareness, self-reported behaviors, and barriers to recycling.

Instructional

- **Identify knowledge gaps to increase participation:** Data gathered will provide clear direction on where recycling confusion exists and communication pathways to ensure desired participation.

Creative

- **Provide the roadmap for the statewide campaign:** Identify primary audiences, messaging frames, and delivery mechanisms necessary to ensure success of the campaign creative and messaging.



Research Overview

Methodology	Online survey of people living in Oregon; Programmed in both Spanish and English.
Total Respondents & Confidence Intervals	Achieved representative sample of Oregon residents with total completed surveys n= 1,029; Confidence intervals ~ 2% to 6%
Participation Criteria	Age 18+ English or Spanish speakers Using quota approach, achieved a mix of <ul style="list-style-type: none">• Urban, suburban, rural• Mix of single family and multifamily• Mix of homeowners and renters
Fielding	August 2 nd – September 3 rd , 2024
Survey Length	15–20 minutes

Oregon Quantitative Research

Executive Summary

Executive Summary

- In general, Oregonians have high self-reported levels of knowledge about recycling, but more education and information is needed about what can be recycled
- Opportunities exist to decrease contamination behaviors – especially bagging practices
- Recycling is generally viewed as "easy" though differences exist across communities so there is no one size fits all message that will resonate
- Opportunity exists to more effectively engage Spanish speakers, BIPOC, and rural communities to increase and sustain participation with desired recycling behaviors

Executive Summary

- ~1/3 of respondents report seeing negative stories about recycling, which makes the right messaging framework critical to get right from the start
- Positive, solutions-focused framing and messaging that we are "simplifying recycling" and not fixing something that does not work well will be most resonate
- Use of relevant and defensible stats is likely to increase trust
- Use of specific messaging channels and messengers that these audiences find motivating will increase trust. For example:
 - Waste haulers
 - Recognizable individuals - people they know

Oregon Quantitative Research

Detailed Findings



Key Findings:

Awareness & Perceptions of Recycling Services & Infrastructure

- Reported knowledge of recycling services is relatively high
- Most households report having recycling service available and report using it, although one in four of those with drop-off locations available do not use the service
- Recycling services that require travel, BottleDrop and drop-off locations, are regarded as somewhat less convenient
- More than one in three respondents live further than five miles away from their nearest recycling drop-off location
- Most have a high opinion of their recycling habits, regarding themselves as above-average recyclers

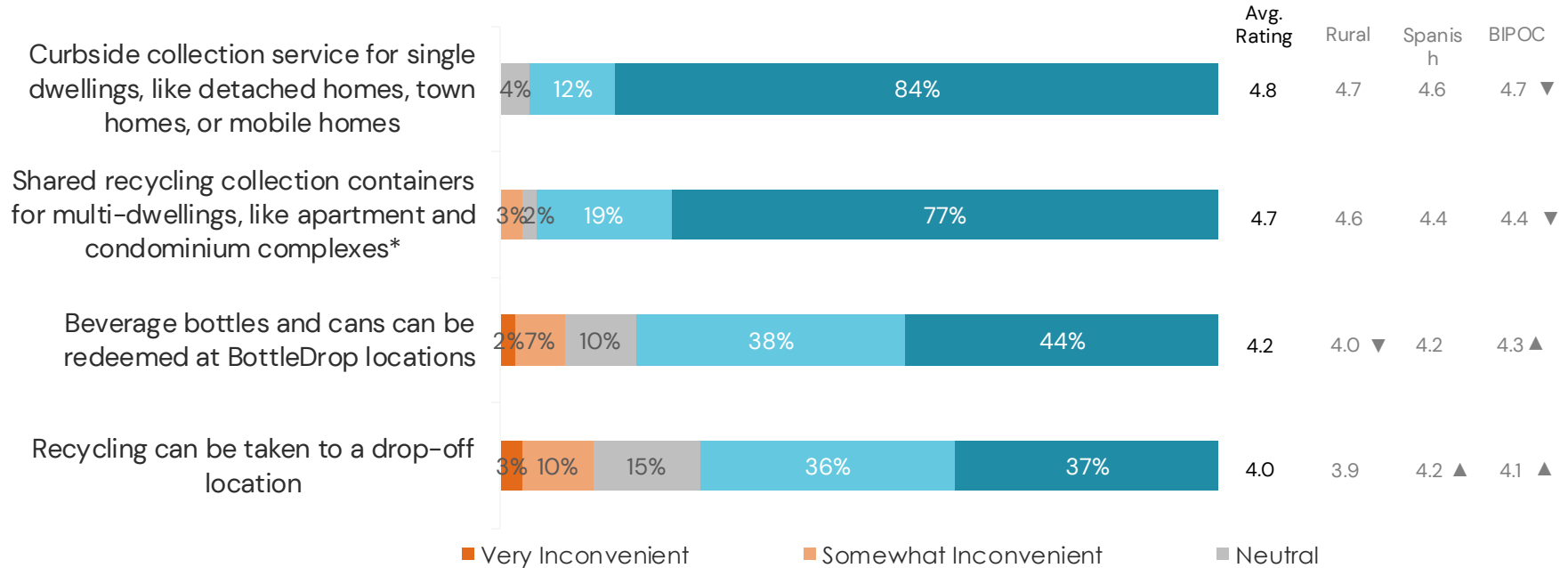


"Reusing materials makes a difference. I just wish our local recycling program wasn't so limited. I hate putting technically recyclable material in the trash."

Curbside and shared collection viewed as convenient, those that require travel regarded as less convenient

BIPOC respondents report curbside collection and shared collection as being somewhat less convenient compared to non-BIPOC respondents

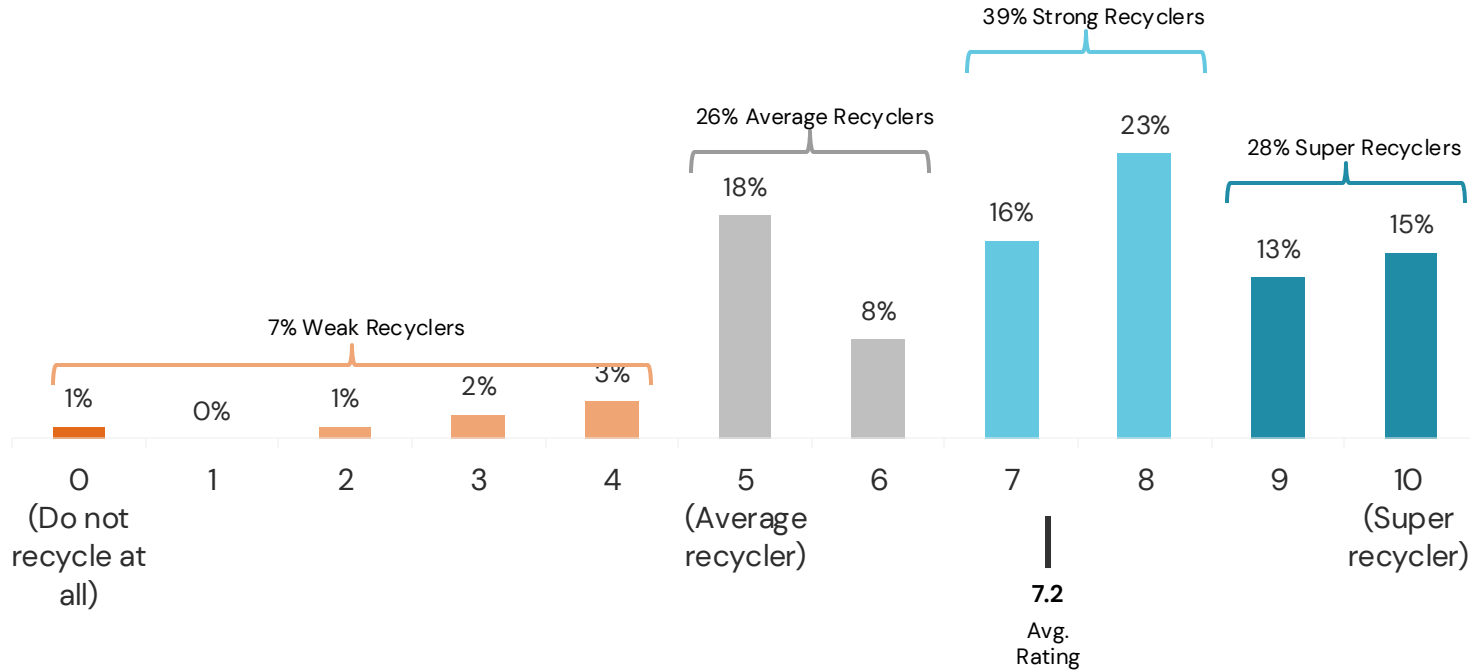
Baseline



Q. How convenient are the following services? (Curbside ... n=714; Shared ... n=197; Recycling ... n=612; Beverage ... n=876)
 This question was asked of those who indicated their household used the service, except for 'Recycling drop-off', which was asked of those who indicated the service was available in their community
 *Data for 'Shared recycling collection ...' was filtered to show only those who report living in multi-dwelling housing (n=197)

Most have a high opinion of their recycling habits

Most regard themselves as above-average recyclers, while very few think of themselves as below average recyclers



Key Findings: Recycling Practices & Knowledge

- Glass bottles and jars and shredded paper are among the top undesired items respondents report recycling
- Given the complexities and perceived similarities of the materials on the list, helping residents differentiate between recyclable and non-recyclable items will be key
- In-home containers are prevalent, but the low number of HHs that have bins in multiple locations demonstrate a high likelihood that materials outside of the kitchen are lost.
- More than one third of respondents bag their recyclables before placing in their outdoor container
- When respondents believe an item should be recyclable, but isn't collected by their service, they most often place the item in the trash
- Nearly half of respondents report wiping or rinsing out contaminated recyclables, while one in four respondents simply place such items in the trash



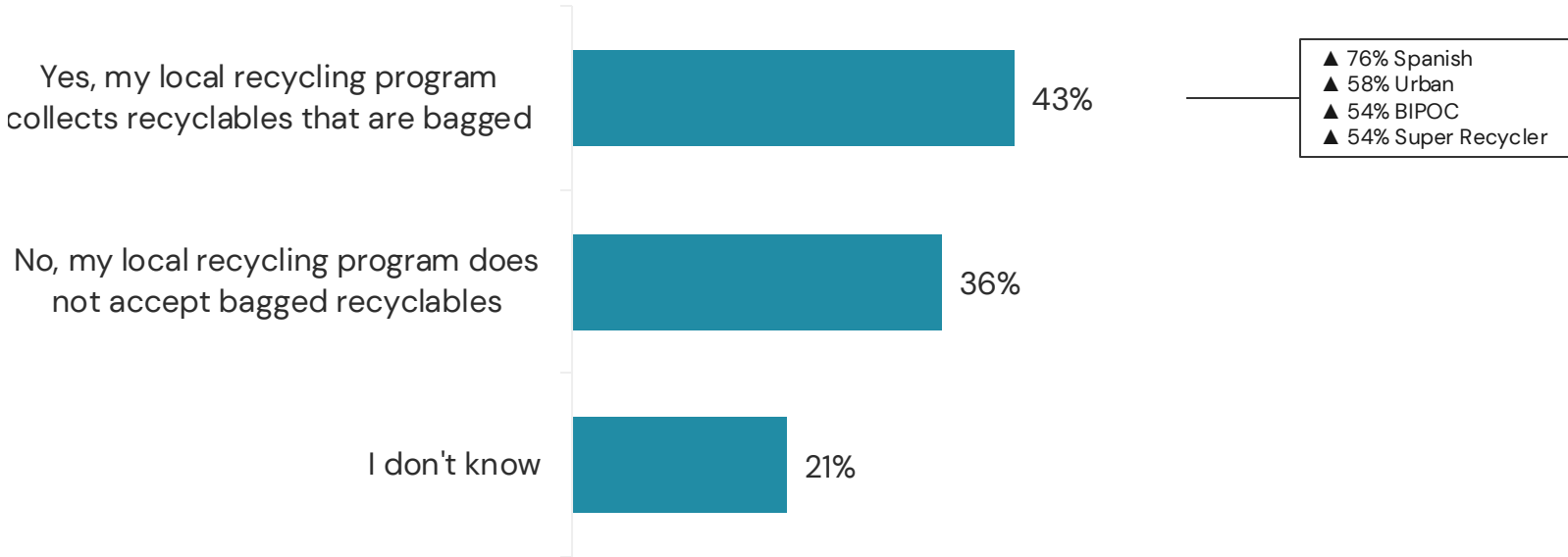
"I take every effort to recycle everything that I can so it can stay out of landfills where it has no chance of breaking down"

Perceived allowance of bagged recyclables

One in five respondents report not knowing if bagged recyclables are allowed

Baseline

Instructional



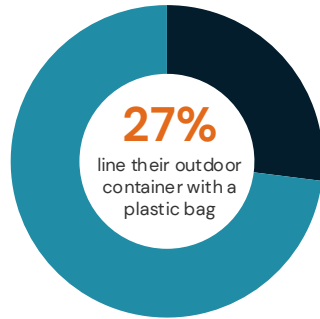
Top Contaminants by Weight

Contaminants:	Tons:	% of total	
Bagged garbage	7,236	15%	Noncovered Product
Paper polycoat, freezer boxes, cups, plates, take-out	4,334	9%	Covered Product
Other Rigid Plastic Containers tubs, trays, etc.	3,735	8%	Covered Product
No Deposit beverage glass	2,991	6%	Covered Product
All other non-cart-OK pkg, pwp, fsw waxed OCC	2,672	6%	Covered Product
Other non-hazardous not cart-acceptable	2,465	5%	Noncovered Product
All food	2,463	5%	Noncovered Product

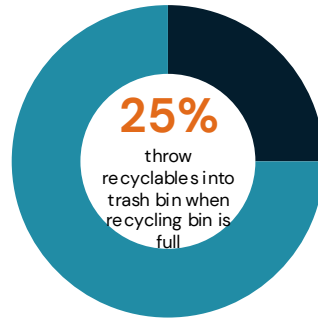
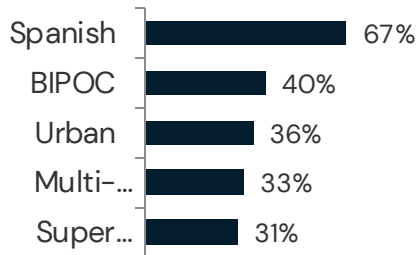
Source: The Recycling Partnership's analysis of preliminary data from 2023 DEQ Inbound Comingled Recycling Study

Recycling behaviors that will need to be addressed; More support is needed for key groups

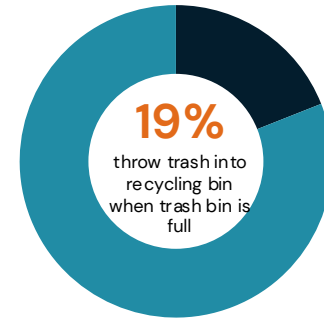
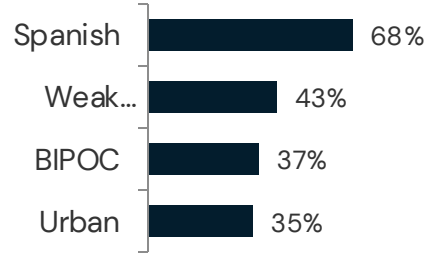
Practices such as lining their outdoor container with plastic, or throwing trash and recycling in the opposing bin when the correct bin is full are done by upwards of one fifth of respondents



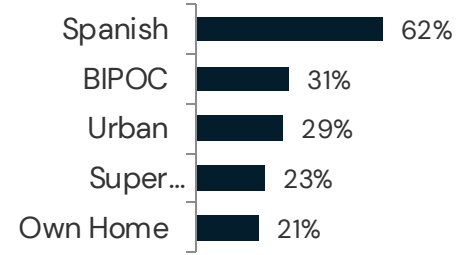
■ Yes ■ No



■ Yes ■ No



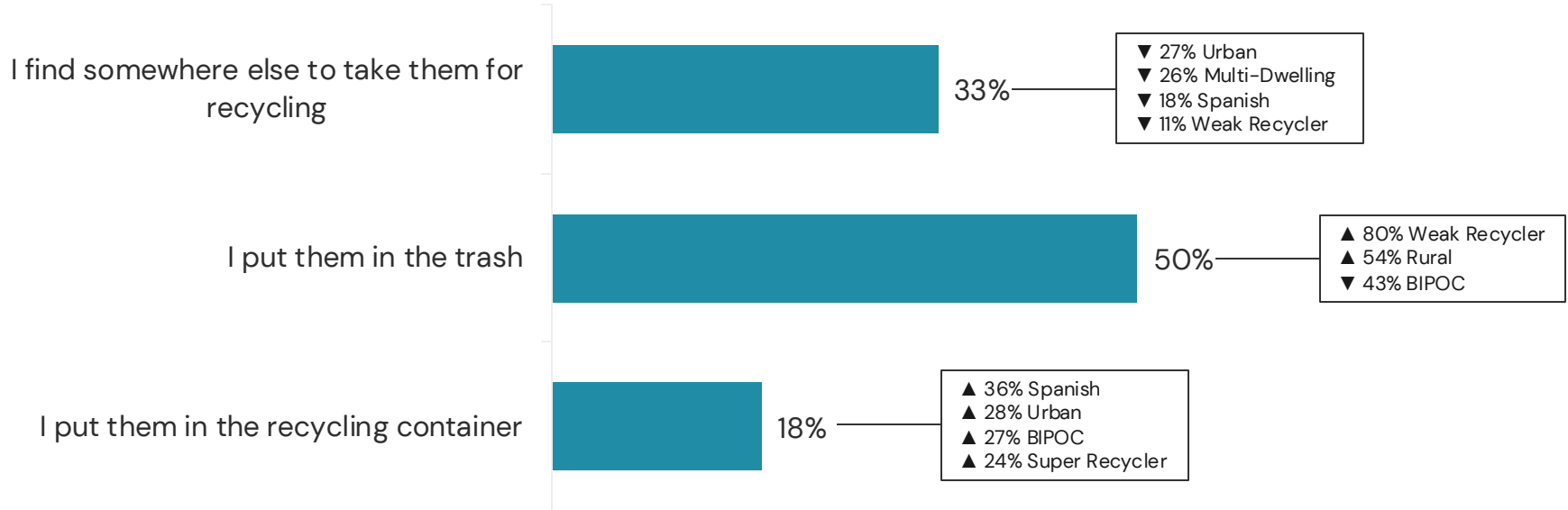
■ Yes ■ No



One in 5 knowingly place non-recyclables in the recycling bin

When respondents believe an item should be recyclable, but isn't collected by their service, they most often place the item in the trash, although one in three respondents report taking the item elsewhere to recycle

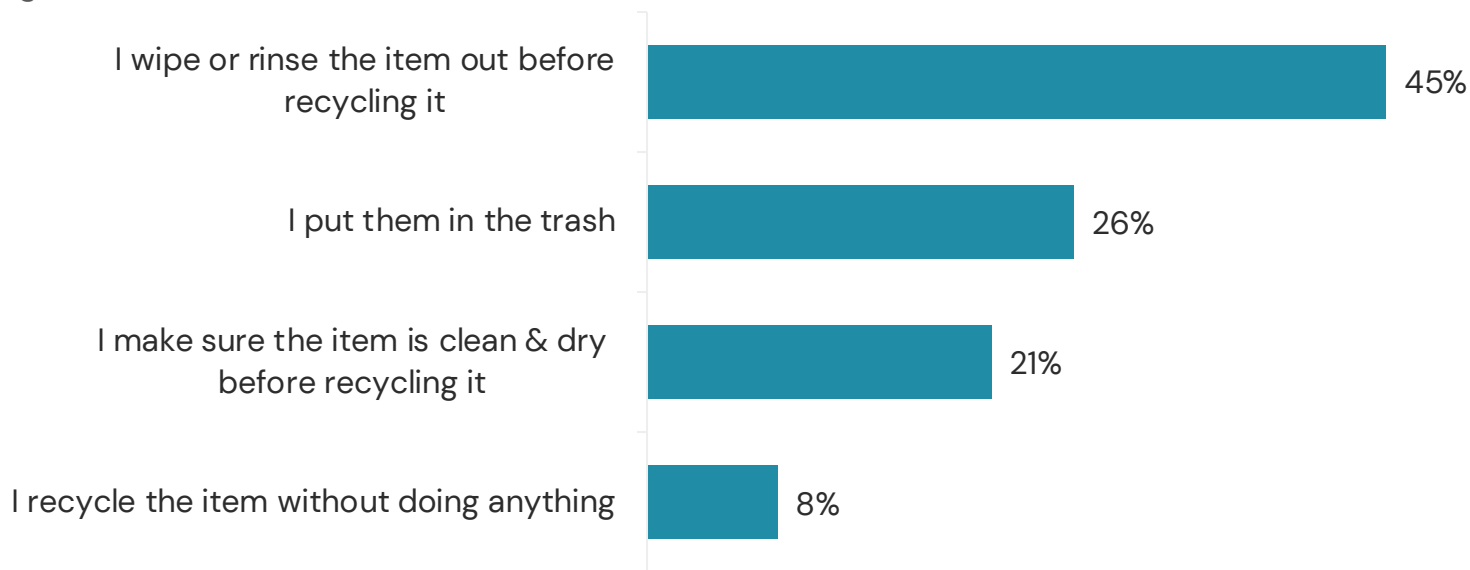
- 8 in 10 self-reported Weak Recyclers place these items in the trash



Cleaning recyclables: opportunity for increasing capture

One in four respondents simply place such items in the trash

- Only one in five respondents take the desired action of making sure the item is clean and dry before recycling



Key Findings: Recycling Sentiment & Attitudes

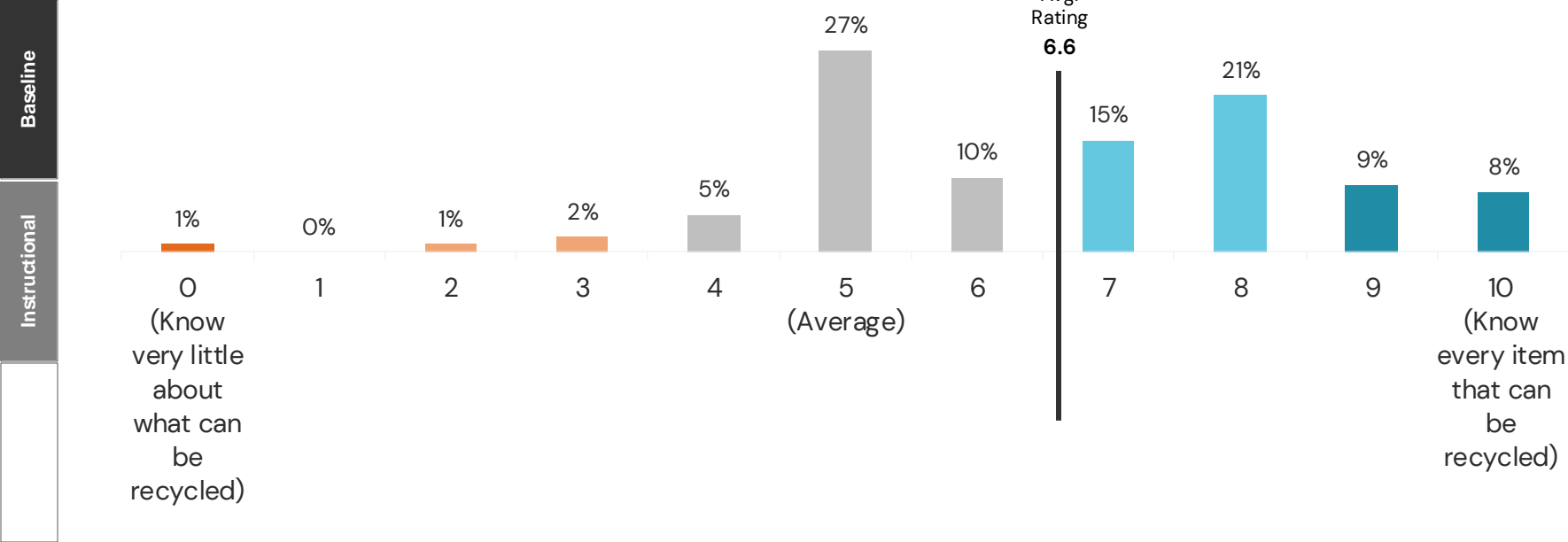
- Most respondents believe that recycling does make a difference, mentioning seeing less trash, or noting products being made from recycled materials
- Most respondents report knowing quite a bit about what items are accepted as part of their recycling program, but not a lot about what happens to their recycling after it leaves their home
- Most respondents believe the items they recycle are made into new things 'sometimes' or more
- Satisfaction with recycling collection and recycling drop-off locations is relatively high, with less than 1 in 10 reporting dissatisfaction
- Most respondents believe in the positive power of recycling and believe it is easy to do so – only one third of respondents find recycling confusing, but rates are higher among Spanish speaking and BIPOC respondents
- Many mention clearer guidelines are needed to recycle better



"I have received info my whole life that recycling is good. I know that big manufacturers/ corporations have a bigger responsibility than my small household. Our impact is very small, but it also isn't too difficult, so I recycle what I can."

Most respondents report knowing quite a bit about what items are accepted as part of their recycling program

Very few rate their knowledge as below average



Q. Rate how much you know about what can be recycled in your local recycling program. Use a 0 to 10 scale, where 0 means you know very little about what can be recycled, 5 is average, and 10 means you know every item that can be recycled in your local recycling program. (n=1,029)

Key Findings: Information Sources

- While most respondents report knowing how to find information about their local recycling program, only about one in three respondents have actually seen communications from their local recycling program
- Most mention remembering the item list, followed by the sorting rules, schedule, benefits of recycling, changes in policy, and recycling locations
- Respondents most trust information about what they can recycle directly from their waste hauler, while BIPOC and Spanish speaking respondents are more trusting of recognizable individuals – friends, family or public figures



"[I want] a number to call to ask about what to do with certain items, where to take them. Brochures with list of places and numbers to call and pictures and explanations of difficult to recycle things."

Two-thirds of respondents do not recall receiving communications

While most respondents report knowing how to find information about their local recycling program, only about one in three respondents report having seen communications from their local recycling program

Baseline

Creative



■ Yes



■ Yes

Oregon Audience Research

Insight & Recommendations




Insight

The promise of recycling is well understood.

- In alignment with previous studies, most people believe recycling makes a difference and are relatively confident that recycling is good for the environment and helps reduce waste.

Recommendation



Campaign messaging does not need to convince them of this. Messaging should focus on how individual actions contribute to realizing this promise.

Insight

Overconfidence in recycling knowledge exists.

- Self-reported above average recyclers who may have ingrained undesired behaviors can lead to more contamination.
- It could be easy to focus on the "super recyclers," yet prior research suggests these individuals have the lowest tonnage of what could be recycled.

Recommendation

It is important to ensure messages capture attention about changes and what is "new."

Provide better, simple instructions to avoid common undesired recycling behaviors (like bagging recyclables).

Maintain a focus on the "weak recyclers" to encourage better recycling practices and increased tonnage.

Insight

Recycling is both easy and confusing.

- The people of Oregon generally view recycling as "easy" but one third admit it can be confusing.


Building trust is critical.

- Many report not knowing what happens to their recycled items and a third of our audience have seen negative media stories about recycling.

Recommendation



We don't need to message that we are making recycling easier but rather that we are simplifying how, where and what to recycle.



Campaign messaging must be transparent about why the way in which we recycle matters.


Be transparent about what happens when items leave the curb and demonstrating desired recycling behaviors.

Insight

Opportunity exists to reach underserved audiences.

- Spanish speaking, BIPOC and rural audiences report:
 - Using curbside collection at a lower rate than other groups
 - Higher rates of undesired recycling behaviors
 - Being less satisfied with recycling collection services
 - Being more likely to believe that recycling is difficult

Recommendation



Craft differentiated, culturally resonant, in-language recycling messaging and information with these audiences in mind.

Use specific messaging and sources that they find motivating and trustworthy, primarily people in their community and networks.

Insight

Opportunity exists to address the rural community gap.

- Rural community members are less likely to believe recycling has a positive impact, that it is easy and that it is an expectation in their community.

Recommendation

Consider extra campaign emphasis in rural areas, especially those who have lacked access in the past.

The campaign should seek out and utilize trusted messengers in rural communities to help build a stronger social norm around recycling.

Insight


Education is needed to address widespread undesired recycling behaviors.

- Undesired behaviors respondents reported include:
 - recycling non-accepted items
 - recycling items that are not clean and dry
 - bagging recyclables
 - lining outdoor containers
 - 'wishcycling' among self-identified super recyclers


There is an opportunity to increase capture.

- There is a belief that to recycle better, people need to be able to recycle more types of materials.

Recommendation



Give recyclers easily accessible guidelines provided by the sources they trust, primarily their waste hauler




We must shift this belief that recycling the things that actually can be recycled is most important (correct items, clean/dry, loose in bin, proper location).

Insight


Awareness is high, but confusion exists.

- While awareness is high for all recycling modes, those which require travel such as BottleDrop and drop-off locations are regarded as somewhat less convenient and used less often.
- Respondents indicate particularly higher levels of confusion for the following recyclables:
 - plastic jugs, printer paper/mail, paper bags, milk cartons, plastic buckets/baskets, pizza boxes and plant/nursery packaging.

Recommendation



Education surrounding drop-off locations is needed to ensure use, especially with the curbside accepted recyclable list changes.




Material-specific education can be considered.

Insight

Positive sentiments are truly felt.

- People already believe that recycling has a positive impact and is beneficial to the environment.
- People do not identify with "we know recycling is confusing", but respond positively to "we are simplifying and improving recycling."

Recommendation

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- Lead with positive framing in messaging.
 - Don't introduce negative statements about the current state of the recycling system.
 - Focus on how we are making it better.
 - Lean into message framing that Oregon is simplifying and improving recycling for everyone.
 - Consider using data and statistics, especially when talking about how the program can help address the tons of material going into the landfill.
 - People want to reduce waste – show them all the ways they can do that via a simplified program.

Discussion Prompts

- What questions does this provoke?
- Where do you want more information?
- What do these insights cause you to think about the way in which we further develop the program?

Thank you

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