

MEMO



To: Thom Metzger, Environmental Industry Associations
CC: Francie Israeli, Kellen Adams Public Affairs
From: Michelle Robinson, Harris Interactive
Date: November 5, 2013
Re: Executive Summary Report – Recycling, *revised November 12, 2013*

Dear Thom,

Below appears the executive summary report for the recycling study, conducted by Harris Interactive on behalf of Environmental Industry Associations from October 29-31, 2013 among 2,022 adults ages 18 and older.

Methodology

This survey was conducted online within the United States between from October 29-31, 2013 among 2,022 adults ages 18 and older by Harris Interactive on behalf of Environmental Industry Associations via its Quick Query omnibus product. Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was used to adjust for respondents' propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Interactive avoids the words "margin of error" as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Interactive surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in the Harris Interactive panel, no estimates of theoretical sampling error can be calculated.

Key Findings

Although 8 in 10 U.S. adults agree that recycling gives them a sense of pride, and another 6 in 10 feel guilty about throwing something away instead of recycling it, over half (54%) agree they would throw something in the regular garbage if a recycling bin was not nearby and less than half (45%) explicitly think about how they would dispose something when they look at it.

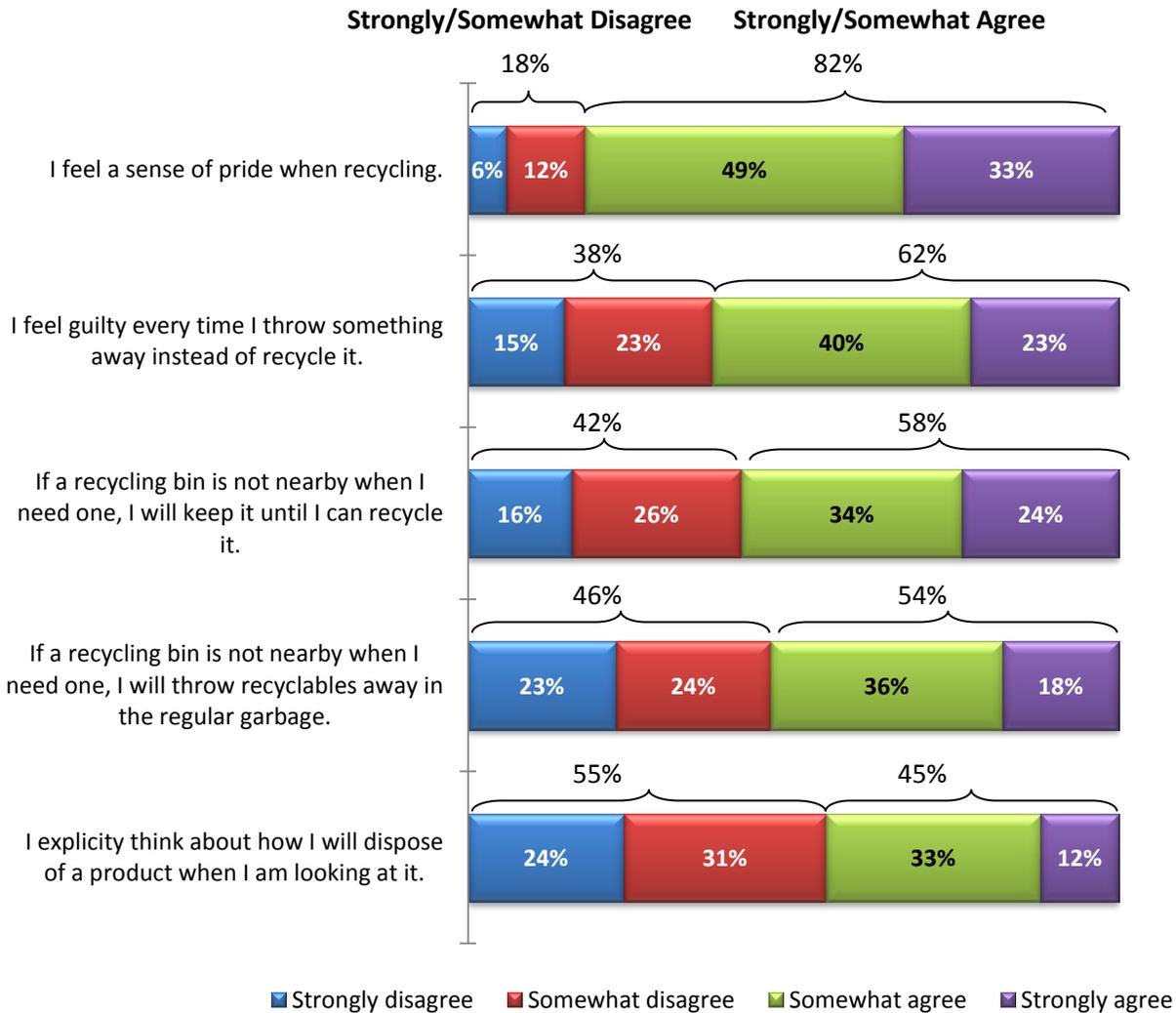
- Southerners, when compared to other regions, are less likely to feel pride or guilt about recycling, and are more likely to throw recyclables in the regular garbage when a recycling bin is not nearby. They are also the least likely region to explicitly think about how they will dispose of something when looking at it.

For those who throw recyclables in the regular garbage if a recycling bin is not nearby, there is some guilt. Over half (54%) of U.S. adults often or sometimes feel guilt—particularly younger adults ages 18-34 (55%) and ages 35-44 (63%). Women in general are also more likely than men to feel guilt often or sometimes (59% vs. 49%, respectively).

Almost 6 in 10 (57%) employed U.S. adults say they make an extra effort to recycle at work, but among all U.S. adults only a third (35%) do walking along city/town streets. Furthermore, just a little over a quarter of U.S. make an extra effort while on a vacation or a business trip (27%) or even when shopping (27%). Another quarter (26%) do not make any extra effort at all.

The good news? In situations where it is applicable, a majority of U.S. adults are often or at least sometimes successful recycling —82% at the workplace, 64% walking along city/town streets, 64% traveling for vacation/business, 62% shopping, and 51% dining away from home.

Detailed Findings – Agreement with Recycling Statements



Question: How much do you agree or disagree with each of the following statements? Base= U.S. adults (n=2,022)

Over 8 in 10 American adults (82%) **feel a sense of pride when recycling.**

- Women are significantly more likely to agree with this statement than men (86% vs. 78%)—and *strongly so* (37% vs. 29%, respectively).
- Those age 45-54 (86%) and age 55+ (85%) are more likely than their younger counterparts age 18-34 (79%) and age 35-44 (78%) to agree with this.
- Although over 8 in 10 U.S. adults in all regions agree with the statement, those in the West (40%) are more likely than those in the South (30%) and Midwest (32%) to *strongly agree* with it.

Over 6 in 10 American adults (62%) admit to **feeling guilty every time they throw something away instead of recycle it.**

- Those who live in the West are more likely than those in any other region to agree with this (West 71% vs. 62% Northeast, 59% Midwest and 59% South).
- Women (67%) are more likely than men (57%) to agree with this.

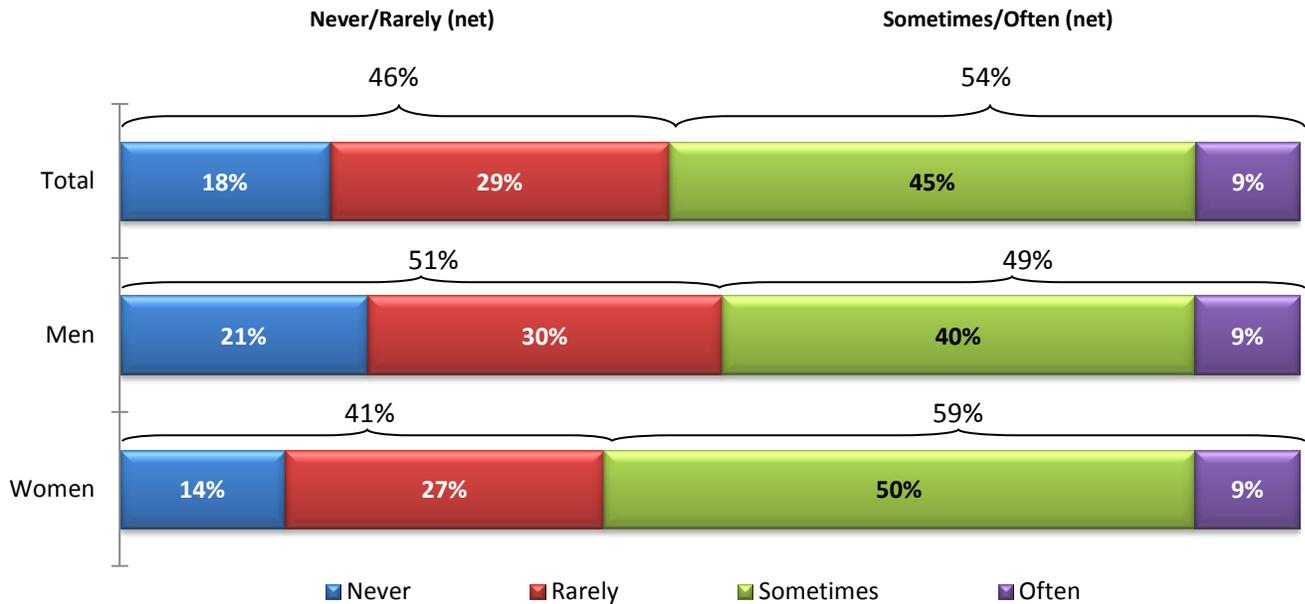
When a recycling bin is not nearby, American adults appear to be divided on what action to take. Fifty-four percent state they **will throw recyclables away in the regular garbage** when faced with this situation, and 58 percent say they **will keep it until they can recycle.** Although what the recyclable is probably plays a role in this decision, there are definitely some differences among subgroups.

- Somewhat surprising, those aged 18-34 (63%) are more likely than any other age group to agree they **throw their recyclables in the regular garbage** [age 35-44 (55%), age 45-54 (50%), age 55+ (48%)]. When it comes to keeping the recyclables until later, results are similar among the age groups.
- Women are more likely than men to **keep the recyclable until it can be recycled** (62% vs. 54%, respectively), while men are more likely than women to throw it in the regular garbage (58% vs. 50%, respectively).
- Those who reside in the South (62%) are significantly more likely than those in the Northeast (49%), Midwest (53%), and West (47%) to say they will **throw their recyclables in the regular garbage**, if a recycling bin is not nearby. Conversely, those in Northeast, Midwest, and West (61% for all) are more likely than those in the South (52%) to **keep it until they can recycle.**

Less than half (45%) of U.S adults agree **they explicitly think about how they will dispose of a product when they are looking at it.**

- Those in the Northeast (50%) are more likely to indicate this than those in the South (41%).

Detailed Findings – Frequency of Feeling Guilty About Not Recycling

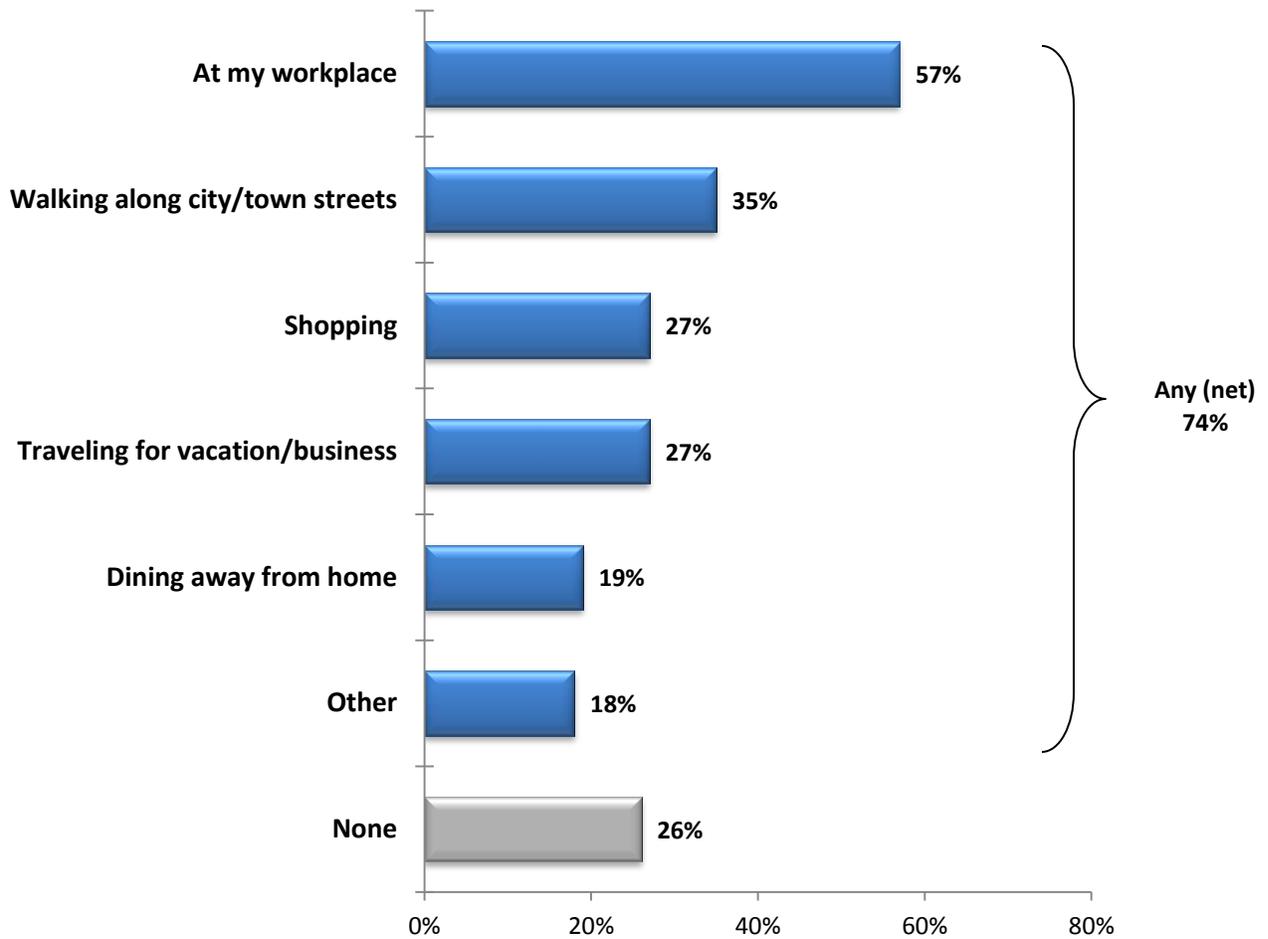


Question: How often, if ever, do you feel guilty for throwing an item away that could be recycled at a later time? Base= Will Throw Recyclables Away If A Recycling Bin Is Not Nearby (n=1,098)

54% of U.S. adults will through away recyclables in the regular garbage if a recycle bin is not nearby. Of those who would (n=1,098), 54% say they **often or sometimes** feel guilty about it, with 9% saying they often do. 46% state they **rarely or never** feel guilty about it.

- Women are significantly more likely to feel guilty **often or sometimes** than men (59% vs. 49%, respectively). Conversely, men (51%) are significantly more likely than women (41%) to say they **rarely or never** feel guilty, and even significantly more like to say never (21% vs. 14%, respectively).
- Adults age 45-54 are significantly more likely than any other age group to say they **never or rarely** feel guilty (58% vs. 45% ages 18-34, 37% ages 35-44 and 48% ages 55+).

Detailed Findings – Places/Times Make Extra Effort to Recycle



Question: In which of the following places or times do you make an extra effort to recycle products? Please select all that apply. Base= U.S. Adults (bases vary)

About three-quarters (74%) of U.S. adults make any extra effort to recycle products.

- Those with a college degree or more education (79%) are more likely to make an extra effort than those with some college (71%) and those with a high school diploma or less education (72%).

26% state they do not make an extra effort.

- Those adults with no children under 18 in the household are more likely than those with children to make no extra effort (29% vs. 20%, respectively).
- Those in the South (33%) are more likely than all other regions to make no extra effort (Northeast 24%, Midwest 21%, West 22%).

Of employed U.S. adults (n=1,167), 57% say they make an extra effort to recycle products **at their workplace.**

- Women are more likely than men to make an extra effort at their workplace (62% vs. 53%, respectively).

Over a third (35%) of U.S. adults make an extra effort to recycle when **they are walking along city or town streets.**

- Those in Northeast (38%) and West (41%) are significantly more likely than those in South (31%) to say this.

More than a quarter (27%) of U.S. adults says they make an extra effort to recycle products **while shopping.**

- Not surprisingly, women are significantly more likely than men to say this (32% vs. 22%, respectively).
- Those in the Northeast (34%) and West (30%) are more likely to say this than those in the South (23%) and Midwest (22%).

More than a quarter (27%) of U.S. adults says they make an extra effort to recycle **when traveling for vacation/business.**

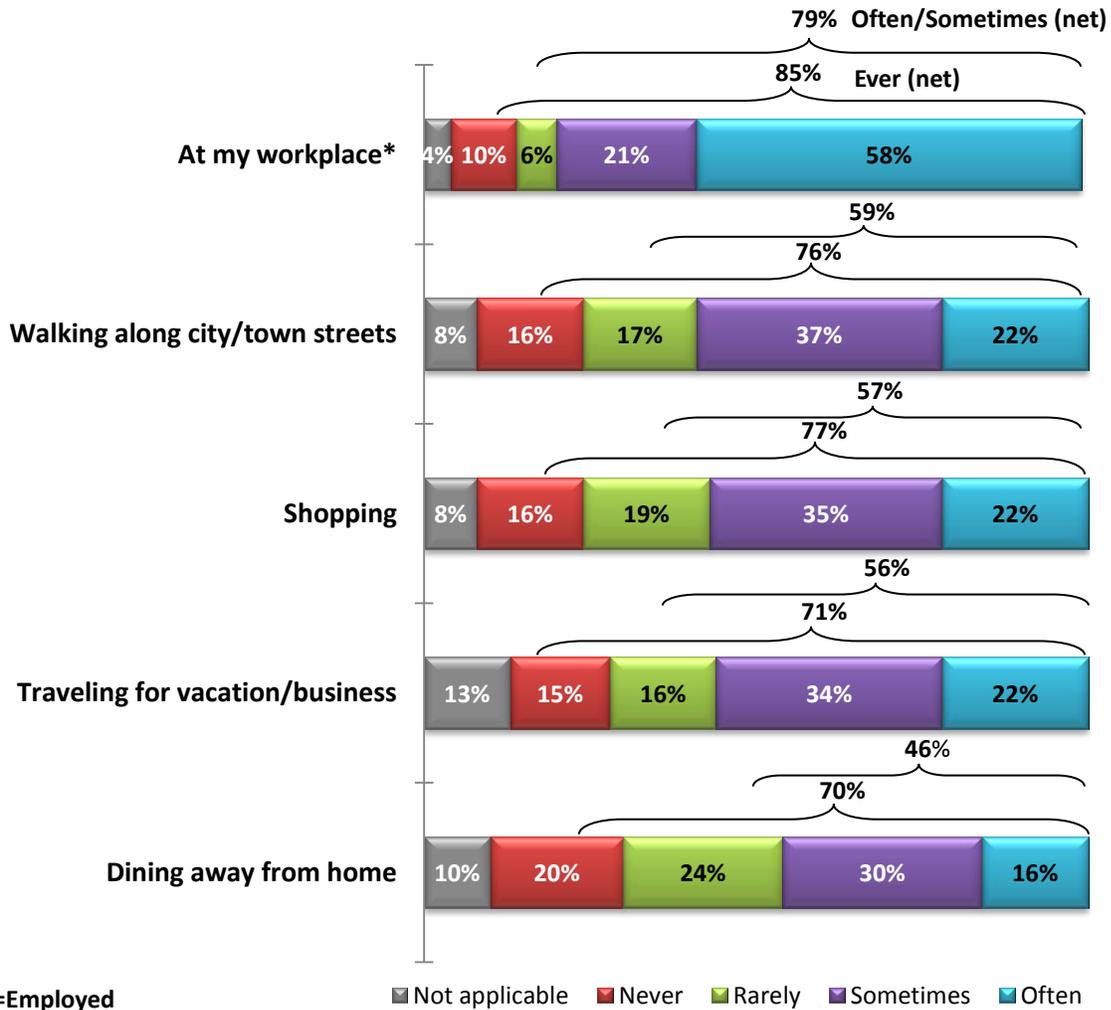
- Women are significantly more likely than men to say this (29% vs. 24%, respectively).
- Those in the Northeast and West (32% for both) are more likely to say this than those in the South (24%) and Midwest (21%).

About 1 in 5 (19%) U.S. adults say they make an extra effort to recycle **when dining away from home.**

- Those in the Northeast (21%) and West (23%) are more likely to say this than those in the Midwest (15%).

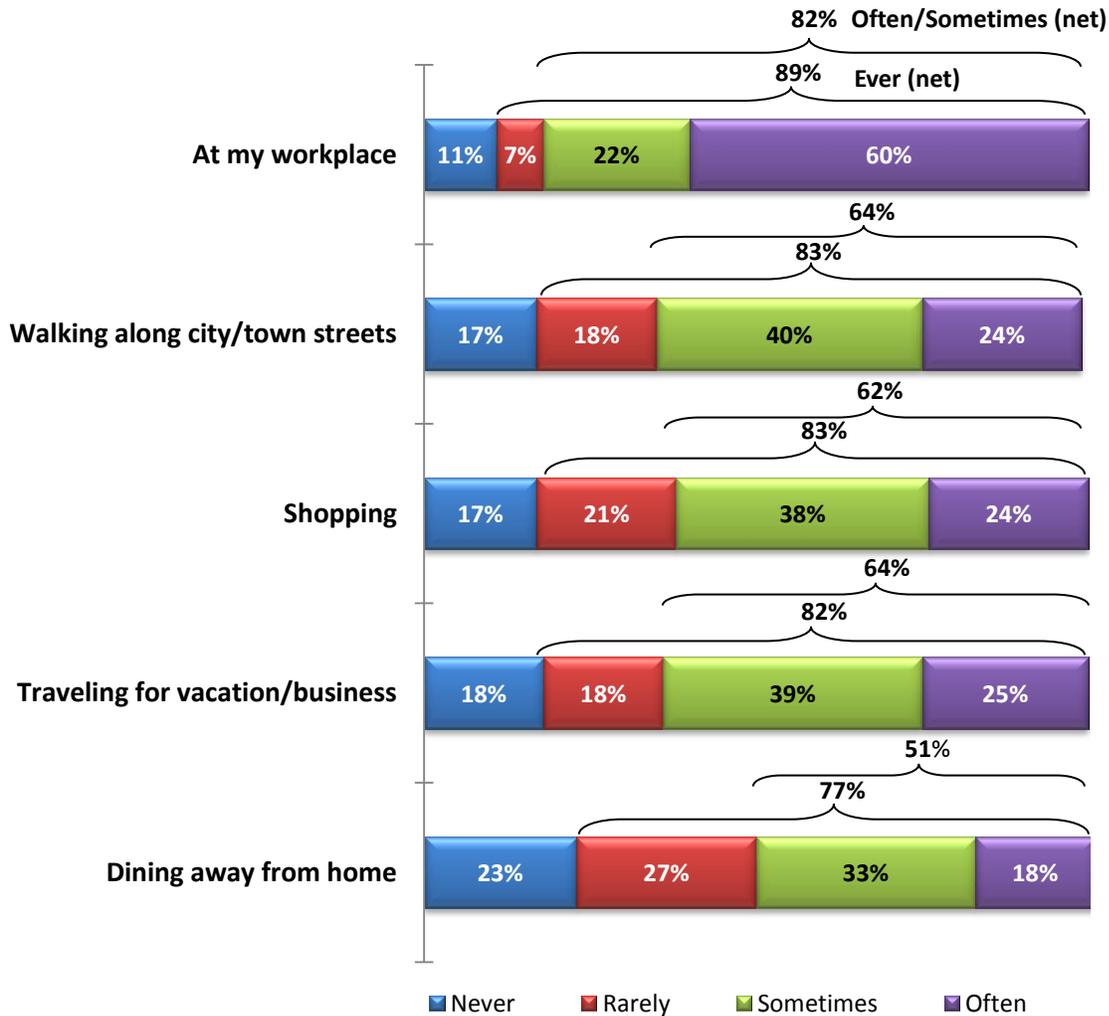
18% of U.S. adults say they make an extra effort to recycle products **some other place or time.**

Detailed Findings – Success of Recycling at Place/Time (Among U.S. Adults)
Ranked by Top 2 (Often/Sometimes)



Question: Approximately how often are you able to successfully recycle in each of the following places or times? Base=U.S. adults (n=2,022)

Detailed Findings – Success of Recycling at Place/Time (Among Applicable Bases)
 Ranked by Top 2 (Often/Sometimes)



Question: Approximately how often are you able to successfully recycle in each of the following places or times? Base=Applicable responses (bases vary)

Among employed U.S. adults where applicable answers were given (n=1,118), 89% say they are *ever* successful at recycling **at their workplace**, with 82% saying they are *often/sometimes* successful. Only 11% say they are *never* successful.

- Those in the Northeast (84%) and West (90%) are significantly more likely than those in South (76%) to be *often or sometimes* successful at recycling at their workplace.
- Younger adults 18-34 (50%) are significantly less likely than any other age group to be *often* successful at recycling at their workplace (age 35-44 66%, 45-54 61%, 55+ 66%).

Among applicable responses (n=1,835), 83% of U.S. adults say they are *ever* successful at recycling while **walking along city or town streets**, with nearly two-thirds (64%) saying they are *often or sometimes* successful. 17% say they are *never* successful at recycling in such a location.

- Those in Northeast (33%) and West (27%) are more likely than those in South (19%) and Midwest (20%) to say they are *often* successful recycling here.
- Those with children under 18 in the household (69%) are significantly more like than those without children (62%) to be successful recycling here *often or sometimes*.

Among applicable responses (n=1,857), 83% of U.S. adults say they are *ever* successful recycling products **while shopping**, with over 6 in 10 (62%) stating they *often or sometimes* are. 17% say they are *never* successful at recycling while shopping.

- Those in the Northeast (33%) are more likely to say they are *often* successful recycling here than those in the South (18%) and Midwest (23%).

Among applicable responses (n=1,727), over 8 in 10 (82%) U.S. adults say they are *ever* successful recycling **when traveling for vacation/business**, with almost two-thirds (64%) saying they *often or sometimes* are. Just 2 in 10 (18%) say they are *never* successful.

- Those in the Northeast (31%) and West (29%) are significantly more likely than those in the South (21%) and Midwest (20%) to say they are *often* successful recycling during this time.

Among applicable responses (n=1,818), 77% of U.S. adults say they are *ever* successful recycling **when dining away from home**, with 51% saying *often or sometimes*. 23% they are *never* successful.

- Those in the Northeast (23%) are significantly more likely than those in the South and Midwest (16% for both) to say they are *often* successful recycling during this time.

Francie,

Thank you for the opportunity to work on this project. Please let me know if you have any questions!

Regards,

Michelle Robinson

Michelle Robinson

Project Researcher, QuickQuery