



Let's Talk Waste Niagara

Stakeholder Consultation Results

Introduction

- * Metroline has completed data collection using four different surveys with residents and businesses receiving curbside waste collection from Niagara Region:
 - * A random telephone survey of 1,253 residents of low density properties
 - * An online survey of 6,639 residents in low density properties
 - * An online survey of 38 residents in multi-residential properties
 - * An online survey of 166 businesses in the IC&I and mixed use sectors

Research Methodology

- * The fieldwork for this research took place between October 23, 2018 and December 7, 2018
 - * Online surveys were open from October 23 to November 30, 2018
 - * Telephone surveys took place between November 8 and December 7, 2018. This survey used listed landline numbers and random cellular numbers to reach the broadest cross-section possible.
 - * Residents were also provided an opportunity to complete the survey on pen and paper, if they wished, and return it to Niagara Region. A small number of surveys were received and incorporated.



Conclusions/Key Insights

Consultation Included All Municipalities

Municipality	Population Proportion	Telephone survey	Online residential	Multi-Residential	Business
Fort Erie	7.9%	84	452	1	24
Grimsby	5.4%	75	347	4	12
Lincoln	4.6%	75	298	4	5
Niagara Falls	18.8%	183	1,312	4	33
Niagara-on-the-Lake	4.2%	67	274	--	4
Pelham	3.5%	73	329	2	5
Port Colborne	5.2%	75	318	1	14
St. Catharines	30.3%	279	2,053	18	47
Thorold	4.2%	74	293	1	5
Wainfleet	1.6%	75	81	--	3
Welland	11.7%	119	727	3	11
West Lincoln	2.7%	74	155	--	3
Total	100%	1,253	6,639	38	166



Targeted and Broad Outreach to Businesses

(social media/newspapers, media coverage and a letter with an invitation to participate in the survey was mailed to businesses in known to be using Regional curbside garbage collection)

* Where located?

- | | |
|---------------|-----|
| * Inside DBA | 48% |
| * Outside DBA | 52% |

* Type of business?

- | | |
|---|-----|
| * Industrial, Commercial, Institutional | 53% |
| * Mixed use property | 47% |

* Inside DBA - receive any enhanced collection?

- | | |
|---|-----|
| * Can put out more than seven bags/containers | 13% |
| * Have collection more than once a week | 26% |



Waste Collection

Does your household/business put out the following items for curbside collection?

- * Almost all homes and most businesses participate in recycling.
- * About 7 in 10 low-density residential households claim to participate in organics collection, but only about 30% of businesses are participating.

	LDR Telephone	LDR Online	MR Online	ICI/MU Online	
				Inside DBA	Outside DBA
Sample size	1,253	6,639 (Weighted)	38	80	86
Recycling – Blue and/or Grey Box/Cart	99%	99%	95%	86%	97%
Organics – Green Bin/Cart	71%	72%	63%	30%	29%
Appliances/Scrap Metal	26%	27%	--	--	--
Bulky/Large items	35%	46%	--	--	--
Leaf/Yard waste	63%	81%	--	--	--
Brush in spring/fall	50%	63%	--	--	--

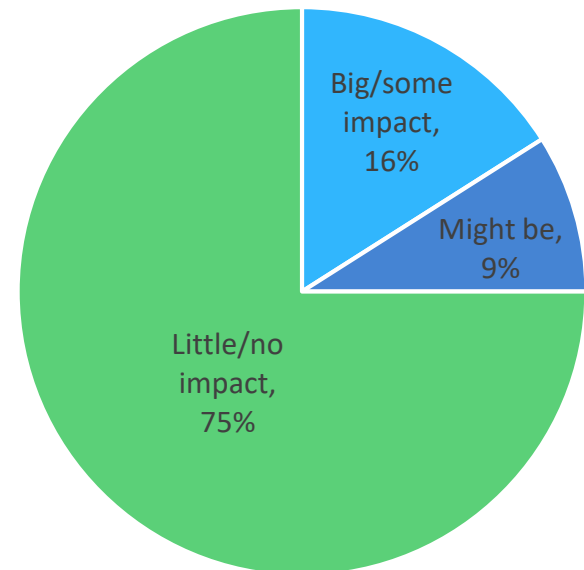


Conclusions/Key Insights

Appliances/Scrap Metal Collection Option – Low Density Residential

- * In the telephone survey, 4 in 5 households in Niagara Region (80%) do not participate in the appliances/scrap metal collection program. Among those who have participated, most only participate about once a year. In the online survey, it was similar, with 75% not participating.
- * Eliminating the curbside appliances/scrap metal collection program would have some impact on about 1 in 5 households in Niagara region. 16% of households in the telephone survey, and 22% in the online survey feel there would be at least some impact.
- * *Conclusion – Given the relatively low participation and impact, it seems this program could be eliminated, providing residents continue to have alternatives of scrap haulers or taking an item to a Regional drop-off depot.*

Impact of stopping appliances/scrap metal collection (Residential)
(Base – Full Sample)

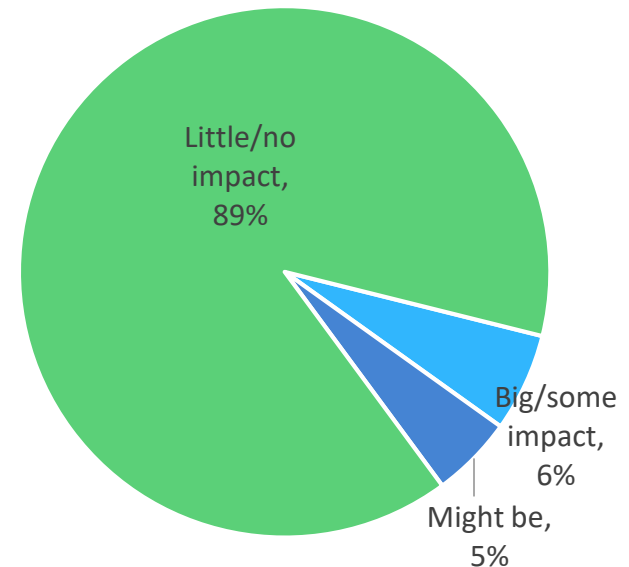


Conclusions/Key Insights

Large Item Collection Option – Low Density Residential

- * In the telephone survey, 29% of households participate in large item collection at least once a year, on average. In the online survey, 44% of households are participating.
- * Only 6% of residents in the telephone survey, and 14% in the online survey, feel a change to limit the number of items to four per collection would have an impact on their household.
- * The vast majority stated there would be little to no impact to them (94% of households in telephone survey, 87% of households in the online survey).
- * *Conclusion - Making a change to the large item collection so that a maximum of four items per collection can be put out will not unduly impact Niagara region residents.*

Impact of stopping bulky/large item collection (Residential)
(Base – Full Sample)



Conclusions/Key Insights

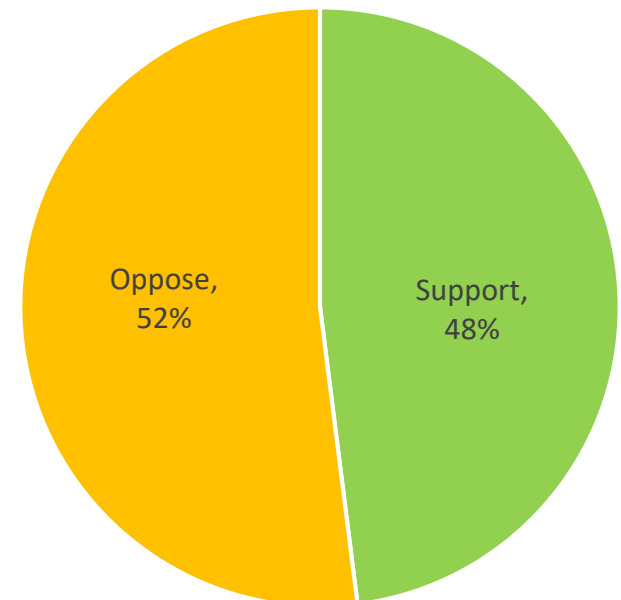
Clear Garbage Bag Option (Residential)

- * Household support for the mandatory use of clear bags in the telephone survey was surprisingly a fairly even split. 48% would support (definitely or probably), and 52% do not support.
- * It's a different picture when looking at the sentiment expressed in the online survey. 27% would support, and 73% oppose.

"I use grocery bags for household garbage and put directly into garbage can. Seems like a waste and I don't want to purchase bags..."

"I do not need anyone to see what I put in garbage. Sewer pipes are not clear plastic because nobody needs to see that either..."

Clear Garbage Bags (Residential)
(Base – Full Sample)



Conclusions/Key Insights

Clear Garbage Bag Option (Businesses)

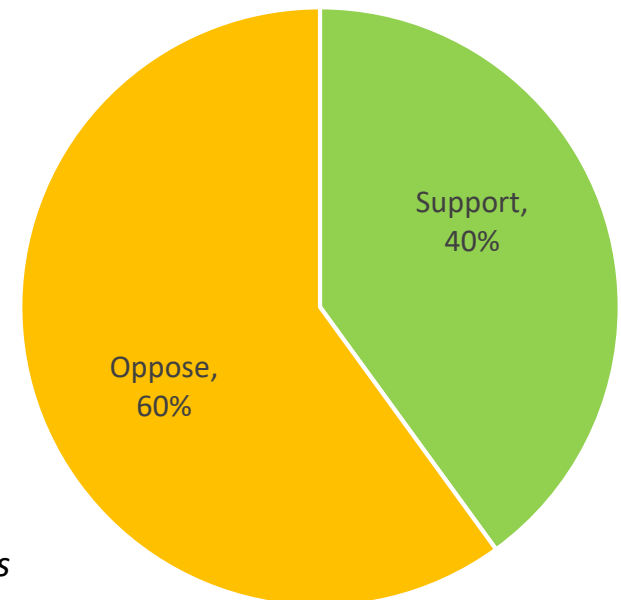
- * In total, we heard from 166 businesses in Niagara region.
- * 40% would support the idea of clear bags, 60% would oppose.

"Black and green bags make it too easy for people to be lazy and not separate a lot of items that likely never need to end up in a landfill. It's encouraging mindfulness when putting your garbage out at the curb..."

"I cannot train my tenants to do this properly. The landlord tenant act does not give me any tools to make them comply..."

"We don't need more government control like the GARBAGE POLICE. Leave some decisions to the citizens and not make this into a Communist Society..."

Clear Garbage Bags (Business)
(Base – Full Sample)



Conclusions/Key Insights

Why Support/Oppose Clear Garbage Bags?

* **Residential**

- * Supporters feel this would help keep unwanted items from the landfill (51%) and encourage people to recycle and use Green Bins (48%)
- * Those opposed don't like the invasion of privacy (40%), and tied to that, they don't want neighbours seeing their garbage (24%). They don't feel Niagara Region needs 'garbage police' (8%).

* **Business**

- * Supporters here also feel it would keep unwanted items from the landfill (30%). They see that it would be safer for the collectors (10%), but only 8% feel it would encourage businesses to recycle/use Green Bins/Carts
- * Those opposed are concerned about their privacy (36%) and don't see a need for 'garbage police' (11%)

❖ *Conclusion: While there is some support for the mandatory use of clear bags, those opposed are quite vocal about their concerns and it could become an issue. We do not recommend making clear garbage bags mandatory.*



Conclusions/Key Insights

Every-Other-Week Garbage Collection Option (Residential)

	Niagara Region		Hamilton (1)		Waterloo Region (2)	
	Telephone (n=1,253)	Online (n=6,639)	Telephone (n=800)	Online (n=1,468)	Telephone (n=511)	Online (n=7,087)
A big impact	27%	37%	34%	44%	25%	18%
Some impact	21%	21%	20%	19%	29%	24%
Might or might not be an impact	7%	9%	6%	8%	7%	10%
Not much of an impact	19%	17%	18%	13%	22%	24%
No impact	26%	16%	22%	16%	17%	24%
Impact Ratio (Big/Some vs. Not much/no impact)	+3%	+25%	+14%	+34%	+15%	-6%

- * 48% of residents in the telephone survey say there would be at least some impact to them in a change to Every-Other-Week (EOW) garbage collection. Typically these are households of at least three people.
- * *Conclusion: Residents are fairly evenly split on how EOW garbage collection would impact their household. In Waterloo Region, the impact ratio was higher for the telephone survey and they elected to begin EOW garbage collection, and with a similar score in Hamilton, council elected not to proceed.*

^[1] City of Hamilton Waste Management Services Public Engagement Survey – Metroline Research Group Inc., 2016

^[2] Region of Waterloo Waste Survey, Metroline Research Group Inc., 2014

Conclusions/Key Insights

Every-Other-Week Garbage Collection Option (Business)

	Total (n=86)	ICI (n=35)	MU (n=51)
A big impact	52%	43%	66%
Some impact	22%	26%	17%
Might or might not be an impact	8%	10%	6%
Not much of an impact	8%	10%	6%
No impact	9%	12%	6%
Impact Ratio (Big/Some vs. Not much/no impact)	+57%	+47%	+71%

- * We heard from 86 businesses located outside DBA zones. There would be significantly more perceived impact to their operation in a switch to EOW garbage collection.
- * *Conclusion: Businesses outside DBA zones have a perceived need to continue having weekly pickup, but they are not fully utilizing the diversion programs.*



Reviewing the Options

Business

IC&I and MU Inside DBA Container Limits

- Slight majority could manage a reduction to four garbage bags/containers (58%)
- Less than half feel there would be a significant impact on their business/property

IC&I and MU Inside DBA Enhanced Collection Frequency

- We had a small sample, but they were on the same page.
- Reducing frequency of collection by one day per week would be a challenge for these businesses

MU Outside DBA Container Limits

- Only one-third could manage reducing from six (6) to four (4)
- 60% feel there would be an impact on their business

IC&I and MU Outside DBA every- other-week garbage collection

- Less than 40% could manage every-other-week collection
- About three-quarters (74%) say their business/property will be impacted by this change

Mandatory clear garbage bag option

- Only 40% supported this option and those opposed are definitely negative and vocal



Reviewing the Options

Residential

Scrap metal/appliances option

- Not widely used, will not cause a big impact on households, and alternative options exist

Bulky/large items option

- Not widely used, and is being reduced not removed, will not cause a big impact on household

Mandatory clear garbage bag option

- There is some support, but those opposed are quite concerned about privacy and a 'big brother' or 'garbage police' mentality

Every-other-week garbage collection

- Support from residential is mixed, and impacts mostly larger families. Waterloo Region proceeded with less support, Hamilton did not. Businesses do not support this.