Bin Trim

SME Campaign Evaluation – Wave 2

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Prepared For NSW EPA

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1. Executive summary

Overview

This survey is the second study that measures the attitudes and behaviours of over 600 Small to Medium Enterprises (SME) towards reducing waste and increasing recycling. The first was conducted in October 2015.

Overall, there has been no change from the benchmark survey in the proportion of SME businesses in New South Wales that claim to be engaged in some form of recycling activity. This has remained constant at 92%.

However, the 2016 results show a shift in the attitudes of SMEs towards aspiring to reduce their waste and to recycle more. Since the first survey in 2015, there has been a growth of 9% in the proportion of SMEs having a positive attitude towards the need to invest in reducing waste and recycling.

Additionally, fewer SMEs in 2016 believe their organisation has done all it can to minimise waste and maximise recycling (down 10%), but 42% still do not plan to have a waste and recycling audit or assessment in the next 12 months. More SMEs have had a waste and recycling audit/assessment or are planning one (up 8%, although not necessarily a Bin Trim assessment) and fewer SMEs acknowledge they have not fully implemented their waste and recycling action plan (down 13%).

While there has been a rapid shift in the desire to invest in waste reduction and increased recycling, awareness of 'how to take the next steps to reduce waste and increase recycling' has fallen 9% since 2015. Importantly, more SMEs are prepared to have a longer payback on the investments they might make to reduce waste and improve recycling.

Eighty per cent of SMEs are fairly or very aware of the steps they can take to better manage waste and recycling efforts at their organisation. This is slightly lower (but not statistically significant) than in 2015 (82%). However the fall (from 34% to 25%) in those rating themselves as very aware is significant and this change is key to understanding the 2016 results. It appears that as SME awareness and willingness to act rises, SMEs are also realising they don't know the next steps. This is based on the findings that fewer SMEs believe they have done all they can to minimise waste and maximise recycling, they are more aware of the approximate costs of waste, and are more willing to invest in waste and recycling over the medium to long term. However, more SMEs feel they are not aware enough about the steps they can take to reduce waste and recycle more.

There has been a positive shift in the SME Attitude and Behaviour segments of 9%

SMEs were segmented on the basis of their attitudes and behaviours; attitudes towards investing in waste reduction and recycling (whether they were prepared to or not) and behaviours (whether they had undertaken a waste and recycling audit/assessment or not). The 2016 tracking study found that there has been a positive shift in the segments, mainly around attitudes towards investing.

Disciples (positive attitudes and behaviours) has risen to 25%; up from 22% in 2016.

Disciples are keen to invest in waste reduction measures (such as a new recycling system or recycling equipment) and have already conducted an assessment of their waste and recycling. Disciples need a reinforcement strategy. They need to know they are doing well and making a contribution to reducing waste. 22% of SMEs surveyed fall within this category.

Spectators (positive attitudes but negative behaviours) has grown in size, now sitting at exactly a quarter in 2016 (25%); up from 19% in 2015.

Spectators are keen to invest in waste reduction measures yet haven't undertaken an assessment. They need a facilitation strategy. Getting started is the problem. The key is to make any waste and recycling innovation appear really easy to them. Anything that the EPA can do to facilitate changed behaviour will work well.

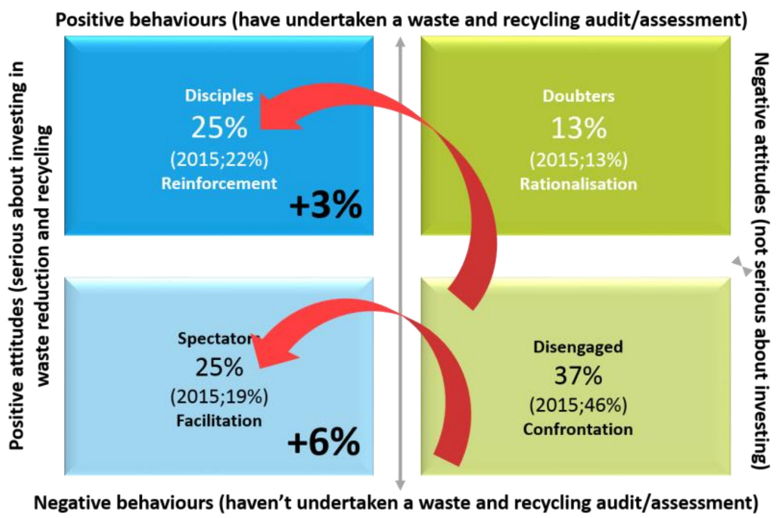
Doubters (positive behaviours but negative attitudes) has stayed the same (13%).

Doubters have undertaken an assessment of their waste and recycling yet are reluctant to invest in waste reduction measures. Doubters need a rationalisation strategy. They need to be informed about the arguments for change and perhaps encouraged to change with the use of subsidies or rebates.

Disengaged (negative attitudes and behaviours) has declined in size, sitting at 37% (down from 46% in 2015).

Disengaged SMEs have not conducted an assessment and have no desire to invest in waste reduction measures. Disengaged SMEs would respond best to a confrontation strategy. They need to be informed about the rising costs of landfill and the reputational and business impacts of not improving waste management practices. These kinds of strategies are likely to get them to focus on change.

Figure 1: Strategy Plot highlighting the 9% shift



What are the SME waste management practices?

Only 54% of SMEs who have a waste and recycling action plan have fully implemented it.

Twenty-one per cent of SMEs have installed recycling equipment to increase their recycling in the past 12 months, while 35% have discussed better ways to deal with waste with their staff.

Twenty-eight per cent of SMEs would definitely install recycling equipment if they had financial assistance. This is about the same as was recorded in the 2015 results. If SMEs had financial assistance to purchase the necessary recycling equipment they would recycle more cardboard, plastic film and rigid plastic materials. Although it is noted that it is unknown if all of these SMEs need recycling equipment or just perceive they need it.

Where do SMEs source information and support?

Seventy-four per cent of SMEs said it was fairly or very easy to get tailored advice or support on how to better manage their waste and recycling costs. However, 17% said it was fairly difficult to get tailored advice. This is up 7% compared to the last wave of research in 2015.

SMEs use good practice guides and fact sheets for advice and support on reducing waste and increasing their recycling efforts. Sixty-one per cent of SMEs use their current waste/recycling contractor as a source of advice while 27% use advisors to educate staff about waste and recycling behaviours.

Which SMEs are taking up the Bin Trim program?

SMEs who have had a Bin Trim assessment (15% of those surveyed) are more proactive in their waste management and consider it integral to the success of their business. However, they are more likely to believe that their waste and recycling actions matter to their end clients, to know their waste and recycling costs and where waste is being produced and to have actively sought help to change their waste reduction and improve recycling .

Impact of the Bin Trim program

The results show clearly that SMEs that have had Bin Trim assessments are more proactive in their waste management and recycling practices, and financial support would definitely encourage them to install additional recycling equipment (33% for Bin Trim assessed; 21% for the average SME). Although it is noted, that it is unknown if all of these businesses need recycling equipment or just perceive they need it.

Awareness of the Bin Trim program rose to 23% of SMEs from 20% in 2015. However, 75% per cent of SMEs remain unaware of the Bin Trim program. Of those who are aware of the Bin Trim program (23% of SMEs interviewed), 66% think they have (either definitely or possibly) had a Bin Trim assessment. Conversion from awareness to participation is very high.

How could the Bin Trim program be improved?

The study tested a range of hypothetical enhancements to the Bin Trim program in the discrete choice model. The results show that almost any additional facilitation strategy undertaken by the Bin Trim program will encourage greater SME participation in the program.

The study tested four attributes of the Bin Trim program in the discrete choice model. For their ability to increase participation. It found that each of the attributes is relatively similar in its ability to drive engagement with the Bin Trim program. Namely:

1. *Assess waste and recycling needs* and *create a tailored waste reduction action plan for your business* accounted for 24% of extra SME engagement.

2. *Implement your action plan – education materials and support to train staff* accounted for 28% of additional SME engagement.

3. *Implement your action plan – support to set up a new recycling system* accounted for 23% of additional SME engagement.

4. *Supporting resources* accounted for 26% of extra SME engagement.

For each of the four attributes a number of different delivery methods were tested (refer to table 31 of attributes and levels). SME's were asked if they would participate in the program for varying and hypothetical levels of Bin Trim assistance.

The most influential attribute was *Help to implement an action plan with education materials and support to train their staff*. The preferred delivery method selected by SMEs for this attribute was staff education services provided by Waste Service Providers and a DIY online training tutorial with phone helpline.

For the second most powerful attribute (*Other supporting resources*), it was the availability of Action Plan templates that was most potent at engaging SMEs.

For the third most powerful attribute (*Assess waste and recycling needs and create a waste reduction action plan*), SMEs preferred this to be provided by a third party such as a local council officer.

For the fourth most powerful attribute (*Help to implement your action plan – support to set up a new recycling system*) SMEs favoured this service to be provided via a third party like a council officer.

Conclusions and Recommendations

The second wave of tracking research reveals that SME attitudes to waste reduction and increased recycling are definitely shifting. Now 50% of SMEs are open to investing in waste reduction and increased recycling (it was only 41% in 2015).

As consideration of more effort in waste reduction and increased recycling rises, SME behaviours do not automatically follow. The results show only indicative (not statistically significant) shifts in investing behaviours.

The data indicates that there is not an automatic connection between an SME wanting to act and an SME getting around to actually acting. Significant barriers for SMEs remain including lack of time and limited staff resources (25%, up 5% on 2015), and financial constraints (18%). There was a statistically significant fall in SMEs citing 'no obvious benefits' as a barrier (down 7% from 2015).

However it appears that when SMEs focus on the challenge of reducing waste and increasing recycling it is more difficult to know what to do than expected. This then acts as a barrier for action as well. The results show that most SME's practice some form of recycling and this remains consistent with the last wave at 92%. There is no change in this behavioural measure in the last 12 months.

Despite a positive attitudinal shift towards preparedness to invest fewer SMEs rated themselves as fairly or very well informed about the advice and support that is available to help better manage their waste and reduce recycling costs. In fact, there has been a fall from 33% per cent to 26% of the SMEs rating themselves as very well informed which is statistically significant. This reinforces the point SMEs perceive a lack of advice and support when there is more available than ever.

The results show a greater recognition among SMEs that their waste and recycling action plans have only been partially implemented. This result ties into reduced awareness of the next steps in reducing waste and increasing recycling, a perception of greater difficulty in getting the tailored advice they need and the reduction in the view that the organisation has done all it can.

In summary, it appears that SMEs are increasingly wanting to take action but more than ever they are calling out for their waste and recycling action to be facilitated. Facilitation being the normal strategy for Spectators.

The Bin Trim program is facilitating change well. The results clearly show that SMEs who have been assessed by Bin Trim (15% of those surveyed) were much more proactive in their waste management, and think of waste management as integral to the success of their business.

The results lead to the following recommendations:

1. The Bin Trim program remains critical to the actual changing of behaviours of SMEs regarding waste reduction and increased recycling and its efforts need to be maintained or increased if at all possible. The efforts to change attitudes should be continued and more focus now on ensuring the behaviour changes are implemented.
2. This may mean consideration of subsidising or incentivising the financing of the more expensive equipment needed for recycling. There is certainly a greater appetite for SMEs to act in this area although many cite the expense as a barrier to action.
3. The following two enhancements to the program could significantly increase participation in the Bin Trim program and should be considered. Namely to provide:
    - *More assessments of SME waste and recycling needs* and *create tailored waste reduction action plan for their business*
    - *Support to implement the action plan, in particular through education materials and support to train staff*.
4. The program should continue with its culturally sensitive Bin Trim assessments and assessors so that the nuances of each culture can be adequately accommodated.
5. SMEs from a Korean background should be a focus of the Bin Trim program as they appear to be much more supportive of waste reduction and increased recycling than any other cultural group. It appears they will take significant action with support and could become successful role models or case studies that can be promoted.

6. There needs to be greater promotion of the Bin Trim program. It will prepare the way for the program's recruitment and it can cement the message that the EPA has the ability to help SMEs reduce waste and increase recycling. The key messages of the promotion should tie together the ideas of reducing waste and increasing recycling to saving money and benefiting the environment. The promotional message should also reiterate that there is help available for businesses to change.

2. Tracking Research objectives

The following research objectives were set down for the tracking study:

1) Revise and update current indicators to best measure the knowledge, attitudes and behaviour of SMEs around the topic of waste management and recycling.
2) Measure and track changes against the 2015 benchmark in SME knowledge, attitudes and behaviours around waste and recycling, including the uptake of recycling services and how/why these decisions are made.
3) Segment SMEs based on knowledge, attitude and behaviour to identify the key target audiences for Business Recycling programs. This segmentation should enable analysis against key demographics (size, location and industry sector), level of environmental engagement and any other variables applicable to the issue. Recommend strategies/key messages for engaging with each segmented group of SMEs according to their characteristics.
4) Measure SME recognition of the Bin Trim brand and provide recommendations for future delivery. Measure SME satisfaction (where applicable) with the Bin Trim program and provide recommendations for future delivery.
5) Determine the impact of the Business Recycling Program and other external factors on changes to SME knowledge, attitudes and behaviour since the 2015 benchmark survey. Recommend overall strategies to increase SME action on reducing waste and increasing recycling.

3. Methodology

A sample of 603 SMEs was collected across NSW with owners or managers of SMEs responsible for waste management within the business, mainly using telephone interviews. A small number of interviews were collected online (143) as was the case in 2015 (127).

In 2015 a sample of 601 was collected. This report compares the two sets of results. This sample provides an effective picture of the NSW market and has the ability to detect changes in the SME market regarding waste reduction and recycling initiatives.

The survey was virtually unaltered to allow results to be compared however the 2016 survey added two components. Namely:

1. A series of questions about awareness and the main message of the advertising activities surrounding the Bin Trim program. This was done by emailing respondents the images and asking respondents to complete a short online survey. Many needed to be followed up by phone to get the answers.

2. A discrete choice model which tested likely SME responses to a Bin Trim program with additional facilitation features.

The SME sectors sampled is shown in the table below. For each sector, 70% were collected in Sydney/Newcastle/Wollongong and 30% elsewhere in NSW. The data was then post weighted to reflect the actual proportion for each sector as occurred with the 2015 data. The weighted data has been used in the report except for the sample profile.

Table 1: Industry sector sample details

	Number of firms	Estimated Proportion %	Sample required	Small <20	Medium 21-199
Accommodation/cafes/restaurants	14563	4.5	75	60	15
Retail trade	25496	7.8	75	60	15
Wholesale trade	18031	5.4	75	60	15
Finance/insurance	34287	10.3	75	60	15
Manufacturing	96456	29.1	75	60	15
Health/community services	26185	7.8	75	60	15
Property/rental/business services	64438	19.4	75	60	15
Government administration/ defence	52637	15.7	75	60	15
Total	**332063**	**100**	**600**	**480**	**120**

The sample profile represents the raw data. In addition some tables and graphs may not add to 100%; these are the result of rounding data to the nearest percent.

When profiling a group two numbers are provided (+/-x%: +/- y%). These first numbers refer to the percentage difference from the average for the specific group being commented on, while the second number is the sample average. In the case of comparing Bin Trim assessed SMEs to those who aren't, the differences are between the two groups.

Sample profile

The demographic characteristics of the final raw data set are detailed below.

Table 2: Demographic characteristics of survey sample

Seen, read or heard about the NSW EPA Bin Trim program	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
No	501	78	461	76
Yes, possibly	47	7	75	12
Yes, definitely	74	12	50	8
Don't know	17	3	16	3
Received a free Bin Trim assessment	**2015 N=**	**2015 %**	**2016 N=**	**2016 %**
Aware Bin Trim	**121**	**100**	**125**	**100**
No	35	29	37	30
Yes, possibly	37	31	38	30
Yes, definitely	44	36	45	36
Don't know	5	4	5	4
Recommend a Bin Trim assessment to other businesses	**2015 N=**	**2015 %**	**2016 N=**	**2016 %**
Used Bin Trim	**81**	**100**	**72**	**100**
No	4	5	2	3
Yes, possibly	31	38	28	39
Yes, definitely	46	57	40	56

Main base of operation	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
Sydney	375	59	355	59
Newcastle	51	8	65	11
Wollongong	32	5	16	3
North Coast	57	9	46	8
South Coast	19	3	14	2
North-Western NSW	25	4	26	4
Western NSW	47	7	41	7
South-Western NSW	28	4	32	5
Other	5	1	8	1

Main base of organisation	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
Metropolitan location	407	64	404	67
Rural location	224	35	195	32
Remote location	8	1	4	1

Main sector of operation	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
Accommodation/cafes/ restaurants	81	13	81	13
Retail trade	75	12	76	13
Wholesale trade	78	12	76	13
Finance/insurance	78	12	79	13
Manufacturing	78	12	76	13
Health/community services	78	12	77	13
Property/rental/business services	89	14	81	13
Government administration/ defence	82	13	57	9

Accommodation / cafes / restaurants	2015 N=	2015 %	2016 N=	2016 %
Total Sample			**81**	**100**
Accommodation			18	22
Café, restaurant, takeaway			48	59
Pub, tavern, bar			11	14
Club or RSL			4	5

Main decision maker	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
Yes	629	98	603	100
No	10	2	-	-

Currently recycle	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
Yes	590	92	556	92
No	41	6	40	7
Unsure	8	1	7	1

No. full time employees	2015 N=	2015 %	2016 N=	2016 %
Total Sample	**639**	**100**	**603**	**100**
6-10	324	51	263	44
11-20	101	16	147	24
Small (6-20)	425	67	410	68
21-49	79	12	85	14
50-99	64	10	68	11
100-199	71	11	40	7
Large (21-199)	214	33	193	32

Age	2016 N=	2016 %
Total Sample	**603**	**100**
18-24	23	4
25-34	106	18
35-44	160	27
45-54	173	29
55-64	117	19
65 and older	24	4
Refused	0	0

Role	2016 N=	2016 %
Total Sample	**603**	**100**
Owner/director	104	17
Partner	62	10
CEO	13	2
Manager	315	52
Other	95	16
Refused	14	2

Gender	2016 N=	2016 %
Total Sample	**603**	**100**
Male	311	52
Female	292	48

4. Main findings

Views of assessors and CALD SMEs

In addition to the survey, six personal interviews were conducted with Bin Trim assessors working with specific culturally and linguistically diverse (CALD) SMEs and with some SMEs from the same CALD groups. The interviews lasted between 20 and 40 minutes. The results were qualitative in nature but highlighted the need for nuanced approaches to SMEs from different cultural backgrounds.

Korean

The key points raised by the Korean SMEs interviewed were:

- Very waste-aware …'I care about the environment, it's dangerous to ignore our responsibility'
- There is a perception that Korea is stricter than Australia about recycling
- Rebates for business would encourage more businesses in general to invest in equipment …'In Korea you have to buy plastic bags. Rebates for businesses to buy paper bags would help a lot'
- Koreans use social media platform 'Naver', no one really reads newspapers.

Chinese

The key points raised by the Chinese SMEs interviewed were:

- Mixed in nature with some Chinese businesses more aware than others. For example one pointed out that *"You are saving more than just the paper when you recycle, you're saving water and natural resources too".*
- Potentially longer time spent in Australia changes Chinese SMEs opinions with one expressing the view that *"Newer immigrants are not in the habit of recycling, they use plastic bags to hold the recycling because they just don't know what to do"*. He suggested that more education is needed to address this cultural gap
- That many businesses don't care because it's included in the waste management bill and they have to pay either way. They perceive that there is no incentive to reduce waste or to increase recycling
- Of the view that the economic needs are much more important to Chinese SMEs than environmental issues such as reducing waste or increasing recycling.

Lebanese

The key points raised by the Lebanese SMEs interviewed were that:

- The way to reach Lebanese SMEs is through someone trusted and probably coming from the same culture
- There is a lot of knowledge that is required to be transferred after trust has been established and this includes why you do it and how you do it
- They respond to environmental messages and health messages such as: ‘if we don’t recycle and instead pollute, the soil will not be clean and the residual chemicals will trigger cancer’.
- Cost is perceived to be a barrier to waste reduction and recycling action because they have no actual knowledge about waste removal and recycling costs.

Key points from interviews with CALD Bin Trim Assessors

Korean

The key points raised by the Korean Bin Trim assessor were:

- Korean SMEs have a strong knowledge of recycling and have established habits of recycling already
- In South Korea recycling is further advanced and it is seen as anti-social not to and this social norm is supported with strong regulation and severe penalties for not complying
- Korean SMEs question why Australia is so far behind on this issue. They are irritated by the lack of action
- Koreans also are slow to approach government agencies for help. They need to be approached one on one.

Chinese

The key points raised by the Chinese Bin Trim assessor were:

- ‘In mainland China they get paid to recycle’
- Chinese don’t like to waste, but extra incentives are encouraging
- The cost of the recycle bin is very similar to the general waste bin. If it is cheaper they would be more inclined
- Better education materials in their language, or regulation compulsory recycling and waste bin in order to register/set up a business would help to embed recycling practices.

Lebanese

The key points raised by the Lebanese Bin Trim assessor were:

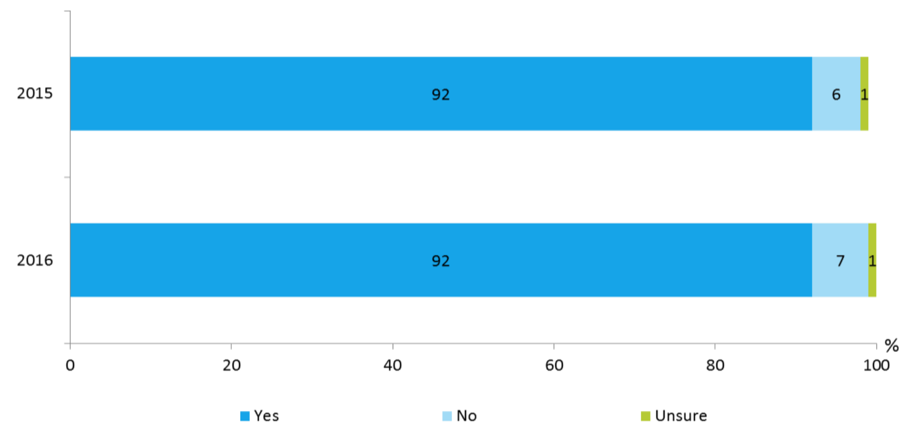
- Many in the Middle Eastern business community have no cultural experience of recycling
- There is a belief that everything goes to landfill – so why even try?

- Many SMEs lack knowledge – even basic knowledge such as what materials go in which bin
- Many think the council public waste bins are there for them to use
- Reaching these SMEs requires following cultural protocols such as males approaching males and females approaching females; appropriate dress and spending a lot of time to explain; shaking hands can be problematic and many assessors spend money in shops to get a chance to talk.

Are SMEs recycling more in 2016?

Most SME's practice some form of recycling and this remains consistent with the last wave at 92%. Seven per cent say they are not recycling at all, and just 1% of SMEs are unsure. There is no change in this measure in the last 12 months.

Figure 2: Are SMEs recycling more in 2016?



QS4. Does your business currently recycle?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Some form of recycling activities, remain highly common in SMEs in 2016 across all industry sectors. None of the changes on this chart are statistically significant at the 95% confidence level.

Table 3: Are SMEs recycling?

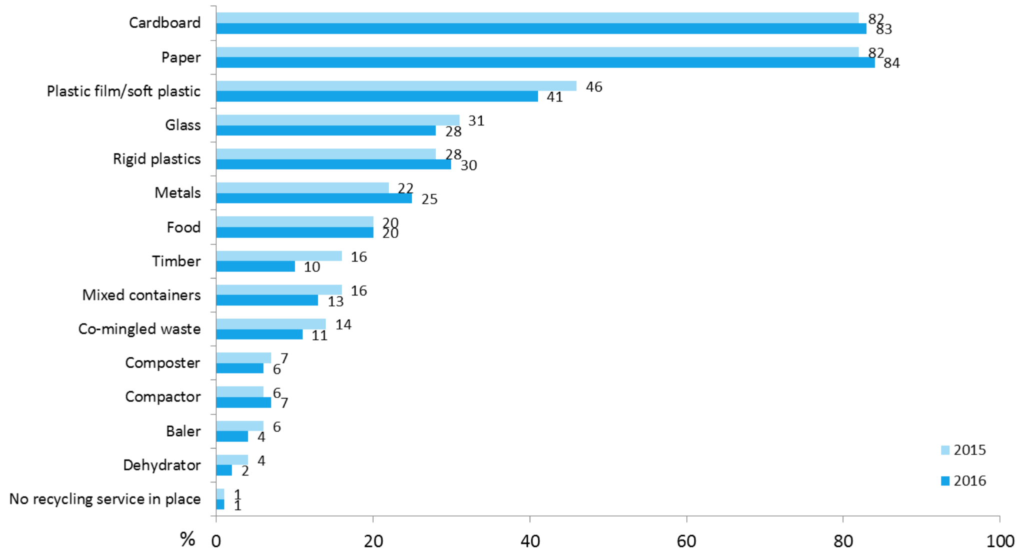
	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes	92	92	91	94	96	92	87	91	92	92	88	92	94	91	92	93	91	93
No	7	6	5	5	3	8	12	9	6	5	12	5	4	8	2	7	9	5
Unsure	1	1	4	1	1	0	1	0	1	3	0	3	3	1	0	0	0	2

QS4. Does your business currently recycle?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

What recycling is taking place? - SMEs that recycle

Recycling services and equipment are in place mainly for cardboard (83%) and paper (84%) recycling. None of the changes on this chart are statistically significant at the 95% confidence level except in the timber category which is down (from 15% to 10%).

Figure 3: What recycling is taking place? - SMEs that recycle



QS5. What recycling services and/or equipment do you have in place?
Base: *Total SME that recycle 2015 (n=590); 2016 (n=556).*

Fewer SMEs in the retail sector are recycling paper while fewer SMEs in the accommodation/café/restaurant sector and property/retail and business services sectors are recycling plastic film and soft plastic. There is a suggestion in these results that the more SMEs focus on even the most common form of recycling (i.e. of paper) there can be a realisation that the recycling system is not capturing all the paper and that more needs to be done.

Table 4: What recycling is taking place? – By industry sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=590)	2016 (n=556)	2015 (n=74)	2016 (n=76)	2015 (n=72)	2016 (n=70)	2015 (n=68)	2016 (n=69)	2015 (n=72)	2016 (n=73)	2015 (n=69)	2016 (n=70)	2015 (n=73)	2016 (n=70)	2015 (n=87)	2016 (n=75)	2015 (n=75)	2016 (n=53)
Paper	82	84	78	66	83	66	71	74	94	95	64	76	95	93	95	93	87	96
Cardboard	82	83	85	87	88	84	82	88	64	79	77	80	84	86	87	83	89	85
Plastic film/soft plastic	46	41	65	41	42	41	47	33	35	52	41	36	53	53	57	40	44	42
Glass	31	28	55	54	17	17	22	25	28	36	20	19	38	36	45	32	31	32
Rigid plastics	28	30	32	36	19	27	15	26	22	37	26	23	32	39	41	33	25	30
Metals	22	25	9	9	18	24	26	26	4	0	41	49	7	6	18	9	16	30
Food	20	20	28	38	14	10	15	14	11	19	19	14	16	13	25	23	23	30
Mixed containers	16	13	15	13	18	9	9	10	21	16	12	9	14	19	20	17	20	17
Timber	16	10	12	3	11	10	19	9	7	4	26	17	5	6	16	8	12	9
Co-mingled waste	14	11	8	8	11	9	6	4	11	7	12	6	14	1	13	8	25	36
Composter	7	6	12	7	1	3	0	9	3	1	9	9	7	7	10	4	4	6
Baler	6	4	3	4	4	6	1	7	0	1	7	7	0	4	14	0	5	0
Compactor	6	7	9	1	3	9	1	9	1	1	7	11	4	1	13	3	3	13
Dehydrator	4	2	1	3	1	3	1	4	1	0	3	4	0	0	9	3	3	0
No recycling service in place	1	1	1	0	0	0	0	1	1	3	1	0	1	1	1	1	1	2

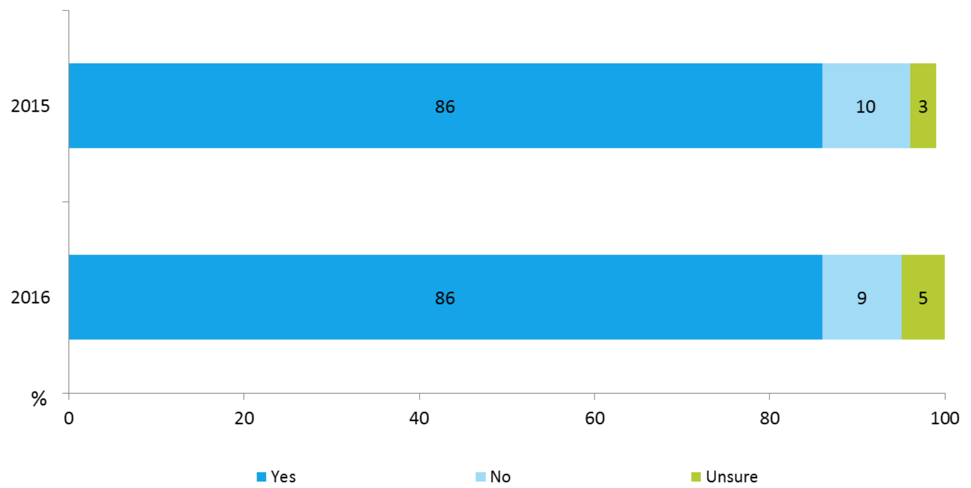
QS5. What recycling services and/or equipment do you have in place?
Base: *Total SME that recycle 2015 (n=590); 2016 (n=556).*

Higher than total at 95% CI
Lower than total at 95% CI

Satisfaction with recycling services - SMEs that recycle

Eighty–six per cent of SMEs report being satisfied with their recycling services. This also represents no change since the 2015 results.

Figure 4: Satisfaction with recycling services

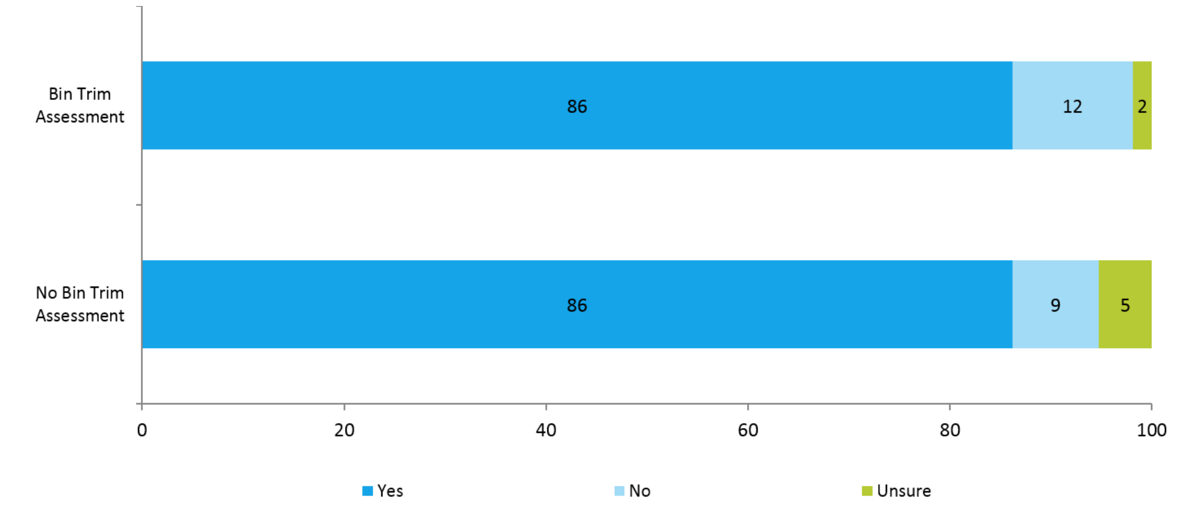


QS6. Are you satisfied with these services?
Base: *Those who have recycling services and/or equipment in place 2015 (n=620); 2016 (n=589)*

Satisfaction with recycling services - Bin Trim assessed SMEs

Satisfaction with recycling services remains the same for SMEs whether they have had a Bin Trim Assessment or not.

Figure 5: 2016 Satisfaction with recycling services



QS6. Are you satisfied with these services?
Base: *Those who have had a Bin Trim assessment (n=92)*

Satisfaction with recycling services – all SMEs

Those SMEs in the finance/insurance sector are more likely to be satisfied than the average SME with their recycling services in 2016 compared to last year.

Table 5: Satisfaction with recycling services year by year comparisons

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=620)	2016 (n=589)	2015 (n=76)	2016 (n=80)	2015 (n=73)	2016 (n=73)	2015 (n=76)	2016 (n=73)	2015 (n=75)	2016 (n=76)	2015 (n=76)	2016 (n=74)	2015 (n=76)	2016 (n=76)	2015 (n=89)	2016 (n=81)	2015 (n=79)	2016 (n=56)
Yes	86	81	83	81	86	89	87	86	80	92	88	88	89	83	93	85	78	82
No	10	15	9	15	10	5	7	7	17	5	9	8	7	11	4	10	18	13
Unsure	3	4	8	4	4	5	7	7	3	3	3	4	4	7	2	5	4	5

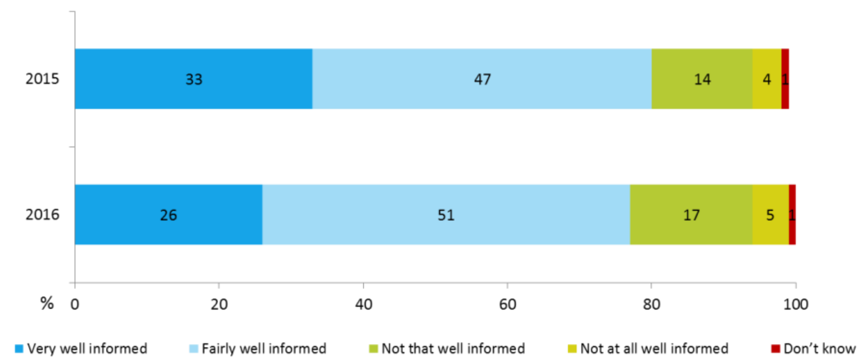
QS6. Are you satisfied with these services?
Base: *Those who have recycling services and/or equipment in place 2015 (n=620); 2016 (n=589)*

Higher than total at 95% CI
Lower than total at 95% CI

5. Information availability, awareness and knowledge for managing waste

In 2016, 77% of SMEs are fairly or very well informed about the advice and support that is available to help better manage their waste and reduce recycling costs. However, it was 80% in 2015. There has been a fall from 33% per cent to 26% of the SMEs rating themselves as very well informed. This is a statistically significant shift.

Figure 6: Managing/controlling waste



Q1. How informed is your organisation about the information, advice and support that is available to help you better manage waste and control your waste removal and recycling costs?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Accomodation/cafés/restaurants SMEs and health/community services SMEs are the two sectors driving this change and who are significantly less likely to be 'very well informed' about the advice and support available to manage their waste and recycling compared to 2015.

Table 6: How well informed about managing/controlling waste

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Very well informed	33	26	37	12	43	29	24	18	27	25	27	17	35	17	34	33	43	46
Fairly well informed	47	51	38	53	40	49	54	51	63	51	63	59	46	57	55	42	33	42
Not that well informed	14	17	17	26	11	14	13	21	5	18	5	17	12	21	10	19	21	9
Not at all well informed	4	5	5	7	3	8	5	7	5	4	5	7	8	4	1	6	1	2
Don't know	1	1	2	1	4	0	4	3	0	3	0	0	0	1	0	0	2	2

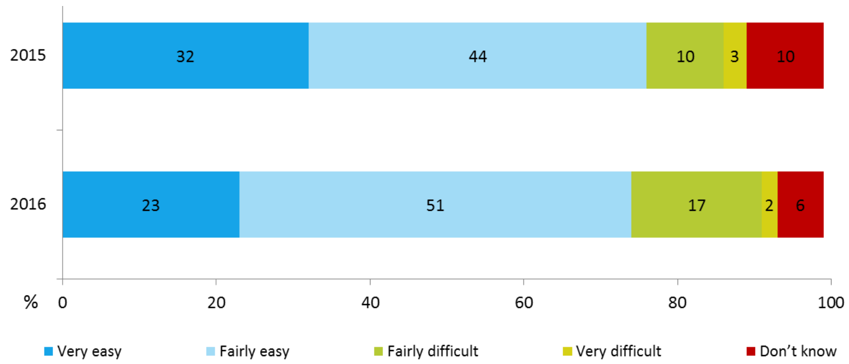
Q1. How informed is your organisation about the information, advice and support that is available to help you better manage waste and control your waste removal and recycling costs?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=79), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/ defence (n=57).*

Higher than total at 95% CI
Lower than total at 95% CI

Receiving tailored advice and support

In 2016, 74% of SMEs said it was fairly or very easy to get tailored advice or support on how to better manage their waste and subsequent recycling costs. However, 17% said it was fairly difficult to get tailored advice. This is up 7% compared to the last wave and indicates that getting information to improve recycling is perceived to be more difficult than anticipated.

Figure 7: Access to tailored advice and support



Q2. How easy or difficult is it for your organisation to get tailored advice or support on how to better manage waste and control your waste removal and recycling costs?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Receiving tailored advice and support by industry sector

More of the SMEs in the accommodation/cafes/restaurants and health/community services sectors agree that it is fairly easy to get tailored advice and support to help them manage and control their waste compared to the previous wave. This has been at the expense of 'very easy' which has fallen significantly for both industry sectors. Overall, 7% more SMEs are reporting it's fairly difficult to get tailored advice to better manage their waste and recycling.

Table 7: Access to information for managing/controlling waste

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Very easy	32	23	36	10	41	22	32	22	35	29	21	17	38	14	39	30	37	33
Fairly easy	44	51	37	56	37	51	41	50	46	44	53	61	40	56	43	48	39	39
Fairly difficult	10	17	19	25	7	14	14	12	13	14	10	18	15	18	7	15	10	21
Very difficult	3	2	1	2	3	7	1	1	0	3	3	1	1	1	3	2	7	2
Don't know	10	6	7	7	12	5	12	14	6	10	14	3	5	10	8	5	7	5

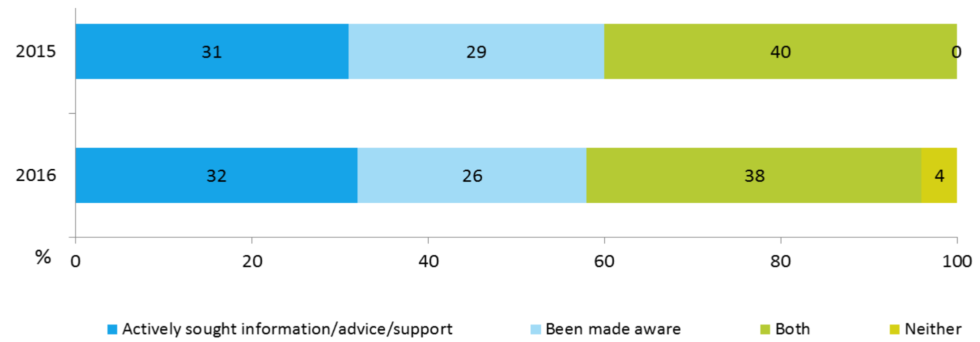
Higher than total at 95% CI
Lower than total at 95% CI

Q2. How easy or difficult is it for your organisation to get tailored advice or support on how to better manage waste and control your waste removal and recycling costs?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/ defence (n=57).*

Did they seek or receive information and advice

Out of the 74% of SMEs who found it very or fairly easy to get tailored advice or support, 32% have actively sought information/advice/support in regards to managing their recycling efforts and 26% have been made aware of what support is available to them. These results show no significant change since the 2015 survey.

Figure 8: Do SMEs seek information/advice/support?



Q3. Is that because your organisation has actively sought information/ advice/ support or because you have been made aware of what is available, or both?
Base: *Those who are very well/fairly well-informed of information available to help better manage waste 2015 (n= 517); 2016 (n=451).*

SMEs in the wholesale trade sector are more likely to have actively sought information/advice/support on how to better manage their recycling efforts in 2016, while those from the health and community services sector are less likely to have been approached and to have sought assistance (now only 33% when it was 52% in 2015).

Table 8: Has SME sought Information/advice/support?

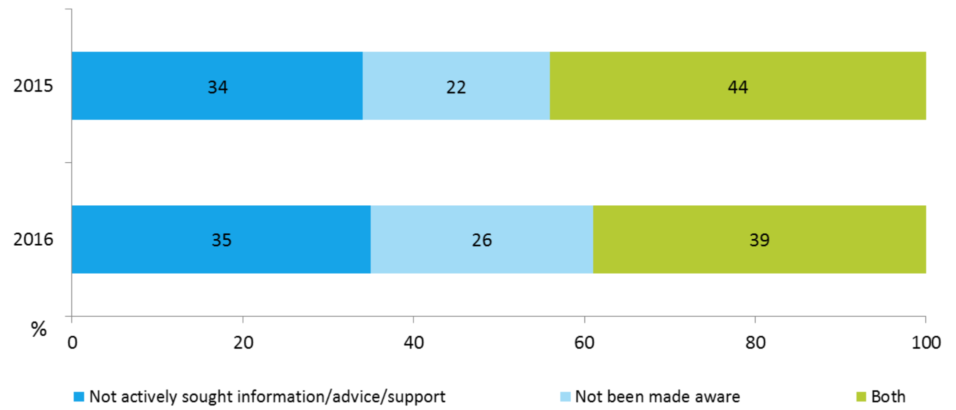
	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/bus. Services %		Gov. admin/ defence %	
	2015 (n=517)	2016 (n=451)	2015 (n=61)	2016 (n=53)	2015 (n=62)	2016 (n=59)	2015 (n=61)	2016 (n=53)	2015 (n=70)	2016 (n=60)	2015 (n=59)	2016 (n=58)	2015 (n=63)	2016 (n=57)	2015 (n=79)	2016 (n=61)	2015 (n=62)	2016 (n=50)
Actively sought information/advice/support	31	32	26	21	35	36	25	47	24	28	39	31	21	26	28	36	34	30
Been made aware	29	26	25	36	23	31	41	25	37	25	27	33	27	30	37	28	18	8
Both	40	38	49	38	42	32	34	25	39	38	34	34	52	33	35	31	48	58

Higher than total at 95% CI
Lower than total at 95% CI

Q3. Is that because your organisation has actively sought information/ advice/ support or because you have been made aware of what is available, or both?
Base: *Those who are very well/fairly well-informed of information available to help better manage waste; Total sample (n=451), Accommodation/cafes/restaurants (n=53), Retail trade (n=59), Wholesale trade (n=53), Finance/insurance (n=60), Manufacturing (n=58), Health/community services (n=57), Property/rental/business services (n=61), Government administration/ defence (n=50).*

Of the 25% of SMEs who did not find it very or fairly easy to source information/advice/support, 35% have not actively sought information/advice/support in regards to managing their recycling efforts and 26% have not been made aware of what support is available to them. A further 39% said it was a combination of their lack of action and the fact no-one had brought it to their attention. These results show no significant change since the 2015 survey.

Figure 9: Do SMEs seek information/advice /support – change



*Caution: small base sizes

Q4. Is that because your organisation has not actively sought information/ advice/ support or because you have not been made aware of what is available, or both?
Base: *Those not informed of information available to help better manage waste 2015 (n=115); 2016 (n=148).*

The analysis by industry sector shows no significant changes since the 2015 survey.

Table 9: Has SME actively sought Information/advice/support?

	Total %		Accom./cafés/ restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=115)	2016 (n=148)	2015 (n=18*)	2016 (n=28*)	2015 (n=10*)	2016 (n=17*)	2015 (n=16*)	2016 (n=22*)	2015 (n=8*)	2016 (n=17*)	2015 (n=19*)	2016 (n=18*)	2015 (n=15*)	2016 (n=19*)	2015 (n=10*)	2016 (n=20*)	2015 (n=19*)	2016 (n=7*)
Not actively sought information/advice/support	34	35	28	18	20	29	50	27	50	53	42	44	27	11	40	35	16	29
Not been made aware	22	26	33	46	30	35	25	32	13	12	16	17	33	32	40	20	16	57
Both	44	39	39	36	50	35	25	41	38	35	42	39	40	58	20	45	68	14

Higher than total at 95% CI
Lower than total at 95% CI

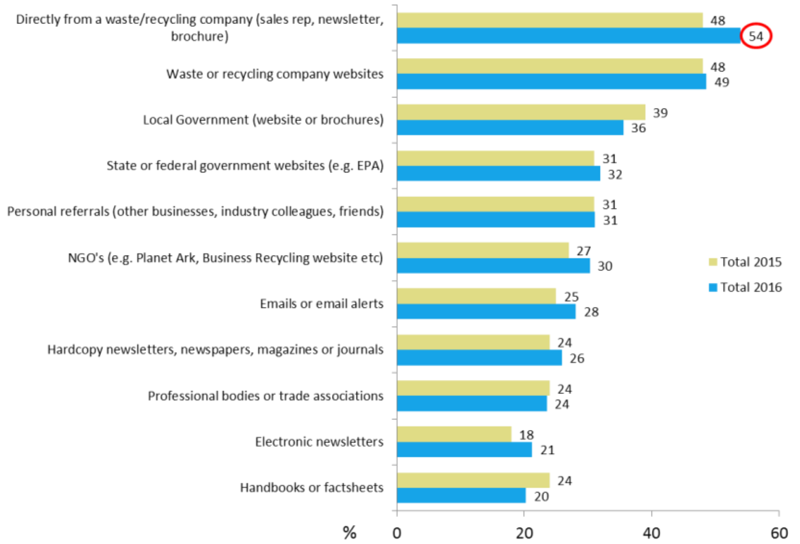
*Caution: small base sizes

Q4. Is that because your organisation has not actively sought information/ advice/ support or because you have not been made aware of what is available, or both?
Base: *Those not informed of information available to help better manage waste; Total sample (n=148), Accommodation/cafes/restaurants (n=28*), Retail trade (n=17*), Wholesale trade (n=22*), Finance/insurance (n=17*), Manufacturing (n=18*), Health/community services (n=19*), Property/rental/business services (n=20*), Government administration/defence (n=7*).*

Sources of information on waste management

Fifty-four per cent of SMEs obtain information on managing their waste and recycling costs directly from a waste/recycling company sales rep and/or brochure, and 49% from waste or recycling company websites. Obtaining the information directly from WSPs is up 6% on the 2015 result. Another 36% of SMEs get their information from Local Government sources and 31% from the NSW state or federal government websites.

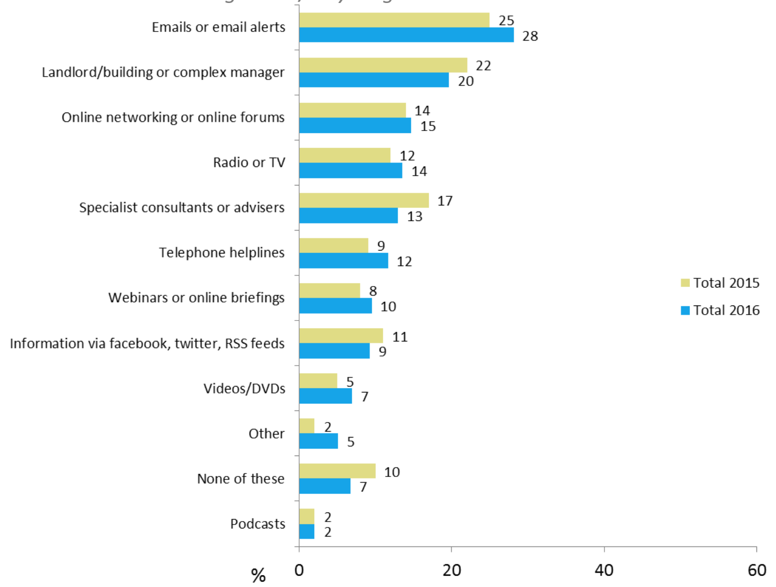
Figure 10: Main sources of information on waste management/recycling 2015/16



Q5. How has your organisation obtained information on managing waste and controlling your waste removal & recycling costs?
Base: *Total sample 2015 (n=639); 2016 (n=603).*
Higher than total at 95% CI
Lower than total at 95% CI

There have been no statistically significant shifts in the other sources of information used by SMEs to obtain information on managing waste and controlling waste removal and recycling costs.

Figure 11: Other sources of information - Waste management/recycling



Q5. How has your organisation obtained information on managing waste and controlling your waste removal and recycling costs?
Base: *Total sample 2015 (n=639); 2016 (n=603).*

The government admin/defence sector sourced more information via emails and email alerts (up 18% since 2015), potentially reflecting more deliberative action on recycling and waste management within this sector. Accommodation/cafes/restaurants are sourcing less information from Local Government websites or brochures (down 20% since 2015) and emails or email alerts (down 16%

since 2015). The health/community services sector is getting less information from the professional bodies or trade associations (down 19% since 2015).

Table 10: Main Information sources on managing/controlling waste

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Waste or recycling company websites	48	49	43	28	47	36	50	43	35	48	56	57	45	38	46	51	49	51
Directly from a waste/recycling company (sales rep, newsletter, brochure)	48	54	44	48	44	50	54	54	26	41	62	71	45	45	42	44	50	51
Local Government (website or brochures)	39	36	52	32	29	29	33	28	37	33	27	28	29	27	57	43	45	54
Personal referrals (other businesses, industry colleagues, friends)	32	31	28	43	31	28	33	39	19	25	37	33	26	26	35	30	32	32
State or federal government websites (e.g. EPA)	31	32	22	30	27	29	19	29	22	24	22	28	23	25	35	30	61	54
NGO's (e.g. Planet Ark, Business Recycling website etc)	27	30	30	21	24	21	23	25	31	25	13	28	22	27	31	27	51	53
Emails or email alerts	25	28	31	15	27	29	18	24	15	23	24	25	19	22	27	23	33	51
Handbooks or factsheets	24	20	35	22	16	25	21	22	14	14	24	17	24	19	28	21	29	26
Hardcopy newsletters, newspapers, magazines or journals	24	26	32	22	29	20	24	26	17	28	19	25	27	16	29	25	23	37
Professional bodies or trade associations	24	24	25	22	19	26	17	24	17	15	22	20	37	16	21	21	37	42
Landlord/building or complex manager	22	20	22	21	16	22	15	20	32	25	8	11	15	27	37	25	30	21

Q5. How has your organisation obtained information on managing waste and controlling your waste removal and recycling costs?
Base: *Total sample 2015 (n=639); 2016 (n=603).*

Higher than total at 95% CI
Lower than total at 95% CI

SMEs in the government/administration/defence sector are more likely to use electronic newsletters to obtain information on recycling in 2016 compared to 2015 (up 19%). The health sector reports less use of specialist consultants (down 20%).

Table 11: Secondary Information sources on managing/controlling waste (2)

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Electronic newsletters	18	21	17	11	8	16	17	18	19	19	19	21	17	16	21	16	20	39
Specialist consultants or advisers	17	13	15	7	17	18	14	12	14	6	10	11	26	6	12	10	35	28
Online networking or online forums	14	15	11	7	11	7	13	17	12	11	15	17	6	9	18	10	16	26
Radio or TV	12	14	12	17	8	9	19	7	15	13	12	13	10	13	15	17	7	14
Information via Facebook, twitter, RSS feeds	11	9	19	12	16	9	10	16	9	15	8	4	8	6	17	7	11	16
Telephone helplines	9	12	10	6	8	5	12	5	6	9	9	14	6	5	9	14	12	16
Webinars or online briefings	8	10	9	9	5	1	12	7	5	10	6	12	3	6	9	6	17	16
Videos/DVDs	5	7	2	2	0	5	8	9	6	6	3	5	3	3	7	4	9	18
Podcasts	2	1	0	2	3	0	5	3	1	0	3	0	3	0	1	2	4	2
Other	2	5	0	4	3	0	5	3	1	5	3	5	3	0	1	2	4	14
None of these	10	7	9	15	8	5	13	5	10	6	14	7	8	13	8	6	5	4%

Q5. How has your organisation obtained information on managing waste and controlling your waste removal and recycling costs?
Base: *Total sample 2015 (n=639); 2016 (n=603).*

Higher than total at 95% CI
Lower than total at 95% CI

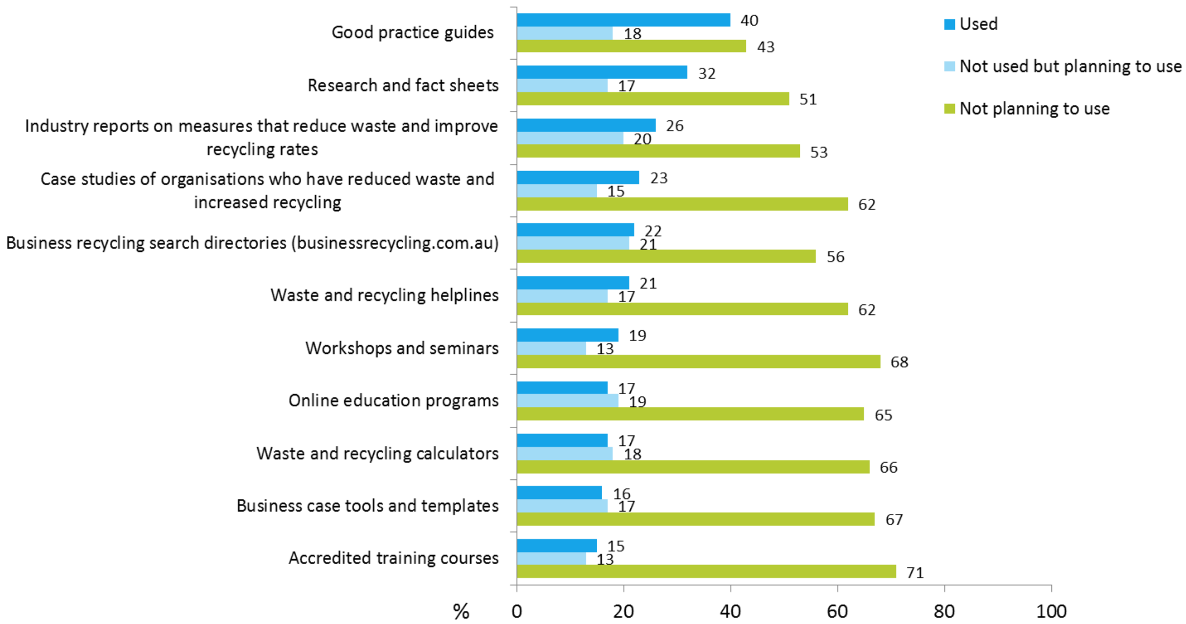
6. Advice and support

SMEs get advice and support on waste reduction and recycling from 6 main sources. These include good practice guides (40%), research and fact sheets (32%), industry reports on relevant measures about reducing waste and increasing recycling (26%), relevant case studies (23%), business recycling search directories (22%) and waste and recycling helplines (21%) for advice and support on reducing waste and increasing their recycling efforts.

These same six sources feature highly in sources 'not used but planning to use' (ranging from 21% to 15% of all SMEs). The sources that most SMEs are not planning to use include accredited training courses (71% don't plan to use), workshops and seminars (68% not planning to use), business case tools and templates (67% not planning to use), waste and recycling calculators (66% not planning to use) and online education programs which 65% are not planning to use.

SME use of waste and recycling helplines increased by 6% from 2015 (up to 21% from 16%) and planning to use waste and recycling calculators also increased by 6%.

Figure 12: Advice/support on reducing waste - Have used/planning to use



Q8. Which of these sources of advice or support on reducing waste and increasing recycling has your organisation used or are you planning to use?
Base: *Total sample 2016 (n=603)*

The wholesale trade sector is less likely to not be planning to use workshops and seminars (down 16%), waste and recycling helplines (down 16%) and online education programs (down 22%). They are more likely to be planning to use online education programs (up 23%) and business recycling search directories. More property/retail and business services SMEs are planning to use good practice guides (22%).

Table 12: Advice/support on reducing waste -Sector analysis

%	Total		Accom./cafés/ restaurants		Retail trade		Wholesale trade		Finance/ insurance		Manufacturing		Health/ comm. Services		Property/ rental/ bus. Services		Gov. admin/ defence	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Workshops and seminars																		
Used	19	19	14	15	16	11	8	17	17	13	17	20	10	14	24	15	30	37
Not used but planning to use	10	13	11	12	12	22	9	16	9	6	9	8	15	18	8	19	11	11
Not planning to use	71	68	75	73	72	67	83	67	74	81	74	72	74	68	69	67	59	53
Accredited training courses																		
Used	16	15	12	10	16	13	9	12	10	13	13	20	14	14	19	15	29	37
Not used but planning to use	11	13	14	15	9	16	9	14	13	6	10	8	13	18	8	19	15	11
Not planning to use	73	71	74	75	75	71	82	74	77	81	77	72	73	68	73	67	56	53
Online education programs																		
Used	16	17	12	17	17	13	10	11	10	11	14	21	10	10	13	14	33	23
Not used but planning to use	15	19	19	16	11	21	6	29	21	15	19	14	14	22	13	26	11	14
Not planning to use	69	65	69	67	72	66	83	61	69	73	67	64	76	68	73	60	56	63
Waste and recycling helplines																		
Used	15	21	10	17	11	22	8	17	12	19	13	26	15	12	21	14	21	26
Not used but planning to use	18	17	19	20	23	21	15	22	18	10	17	12	17	17	18	26	20	14
Not planning to use	67	62	72	63	67	57	77	61	71	71	71	62	68	71	61	60	60	60
Business case tools and templates																		
Used	16	16	12	16	15	11	6	16	6	11	15	16	10	12	21	15	27	28
Not used but planning to use	13	17	15	14	12	20	10	24	18	13	10	14	21	16	12	21	15	16
Not planning to use	70	67	73	70	73	70	83	61	76	76	74	70	69	73	66	64	59	56
Good practice guides																		
Used	40	40	46	38	25	38	24	34	29	29	41	39	37	34	44	40	51	53
Not used but planning to use	14	18	15	23	20	21	17	26	17	16	17	14	13	19	9	25	12	9
Not planning to use	46	43	40	38	55	41	59	39	54	54	42	46	50	47	47	36	37	39
Research and fact sheets																		
Used	29	32	43	27	24	25	17	16	23	25	22	32	24	23	42	32	35	49
Not used but planning to use	15	17	9	21	12	20	10	29	13	10	18	17	12	18	15	16	21	18
Not planning to use	56	51	48	52	64	55	73	55	64	65	60	51	64	58	44	52	44	33
Case studies of organisations who have reduced waste and increased recycling																		
Used	19	23	17	20	15	13	9	18	14	22	17	24	13	14	27	19	27	39
Not used but planning to use	13	15	11	20	16	16	15	14	13	10	13	13	15	17	11	20	12	14
Not planning to use	68	62	72	60	69	71	76	67	73	68	71	63	72	69	62	62	61	47
Waste and recycling calculators																		
Used	16	17	20	16	9	13	6	14	9	6	18	18	6	8	21	17	21	26
Not used but planning to use	12	18	15	23	16	18	14	17	14	14	10	13	12	17	13	25	9	18
Not planning to use	72	66	65	60	75	68	79	68	77	80	72	68	82	75	65	58	71	56
Industry reports on measures that reduce waste and improve recycling rates																		
Used	24	26	17	19	17	16	9	24	21	16	24	32	19	18	27	21	32	42
Not used but planning to use	16	20	19	23	16	30	21	29	12	13	19	21	19	19	12	20	13	16
Not planning to use	60	53	64	58	67	54	71	47	68	71	56	47	62	62	61	59	55	42
Business recycling search directories (businessrecycling.com.au)																		
Used	19	22	11	19	13	17	12	17	17	22	19	25	15	17	21	21	27	28
Not used but planning to use	16	21	15	26	20	24	10	32	21	9	17	22	14	22	18	25	12	16
Not planning to use	65	56	74	56	67	59	78	51	63	70	64	53	71	61	61	54	61	56

Q8. Which of these sources of advice or support on reducing waste and increasing recycling has your organisation used or are you planning to use? ***Base:*** *Total sample 2015 (n=639); 2016 (n=603)*

Higher than total at 95% CI
Lower than total at 95% CI

Which sources of advice or support are being used?

Sixty-one per cent of SMEs use their current waste/recycling contractor as a source of advice while 27% use advisors to educate staff about waste and recycling behaviours.

Figure 13: Which sources of advice or support are being used?

Q9. Thinking about your organisation, which of these sources of advice or support have you used or are you planning to use?
Base: *Total sample 2016 (n=603)*

Sources of advice being used

Overall, use of their current waste/recycling contractor as a source of advice or support is down in 2016 by 6%. This occurred particularly in the property/retail/business services and government admin/defence sectors (16% for both).

Overall, interest in planning to use advisors from their professional body or trade association is up (from 10% to 17%) as are plans to use advisors to engage and educate staff around waste and recycling behaviours (up from 12% to 18%).

Table 13: Which sources of advice are being used?

	Total		Accom./cafés/ restaurants		Retail trade		Wholesale trade		Finance/ insurance		Manufacturing		Health/ comm. Services		Property/ rental/ bus. Services		Gov. admin/ defence	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2015 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
My current waste/recycling contractor																		
Used	67	61	67	60	59	64	65	62	54	49	64	70	64	49	70	54	83	67
Not used but planning to use	7	12	7	12	8	14	6	11	6	8	10	13	6	17	7	15	4	9
Not planning to use	26	26	26	27	33	21	28	28	40	43	26	17	29	34	24	31	13	25
A new waste/recycling contractor																		
Used	20	18	17	17	20	14	19	17	18	10	21	20	10	12	19	20	26	23
Not used but planning to use	14	18	12	19	13	20	15	30	13	9	15	20	10	19	11	20	16	14
Not planning to use	67	64	70	64	67	66	65	53	69	81	64	61	79	69	70	60	59	63
Specialist waste and recycling consultants																		
Used	24	23	30	14	21	18	17	29	19	23	21	28	27	18	18	16	39	28
Not used but planning to use	13	17	11	20	9	20	12	17	12	15	15	17	12	18	12	20	13	14
Not planning to use	63	60	59	67	69	62	72	54	69	62	64	55	62	64	70	64	48	58
Mentors who know about waste and recycling in your sector																		
Used	20	24	19	22	25	22	13	21	13	18	15	24	15	25	18	14	35	44
Not used but planning to use	11	16	17	19	13	20	8	17	12	14	13	13	13	9	9	25	9	14
Not planning to use	69	60	64	59	61	58	79	62	76	68	72	63	72	66	73	62	56	42
Advisors from your professional body or trade association																		
Used	26	27	21	27	27	28	12	24	18	20	23	32	21	13	28	17	40	44
Not used but planning to use	10	17	15	11	9	26	9	18	9	10	12	18	18	23	9	17	7	14
Not planning to use	64	55	64	62	64	46	79	58	73	70	65	50	62	64	63	65	52	42
Advisors that engage and educate staff around waste and recycling behaviours																		
Used	24	27	27	16	21	28	14	16	15	15	22	33	22	16	26	28	37	33
Not used but planning to use	12	18	10	21	20	20	10	24	10	16	10	12	10	18	10	22	17	25
Not planning to use	64	55	63	63	59	53	76	61	74	68	68	55	68	66	64	49	46	42

Q9. Thinking about your organisation, which of these sources of advice or support have you used or are you planning to use?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Higher than total at 95% CI
Lower than total at 95% CI

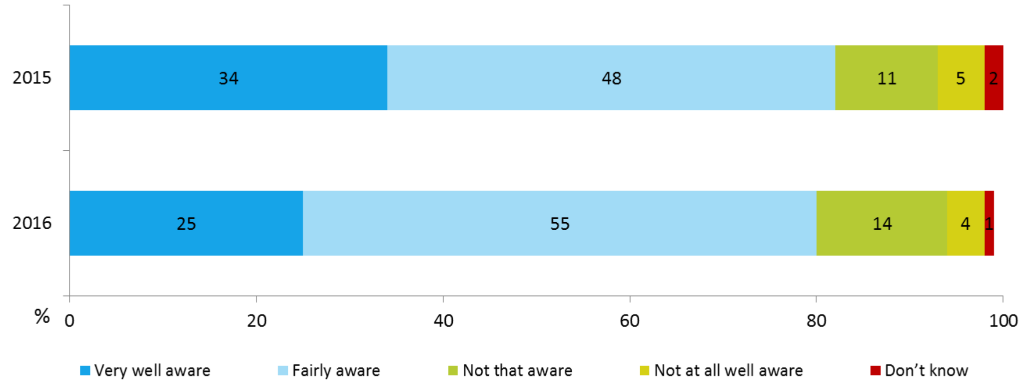
Awareness of how to better manage waste and recycling

Eighty per cent of SMEs are fairly or very aware of the steps they can take to better manage waste and recycling efforts at their organisation. This is slightly lower (but not statistically significant) than in 2015 (82%). However the fall (from 34% to 25%) in those rating themselves as very aware is significant and this change is key to understanding the 2016 results.

It is interesting to note that fewer SMEs believe they have done all they can to minimise waste and maximise recycling, they are more aware of the approximate costs of waste, and are more willing to invest in waste and recycling over the medium to long term. However, more SMEs feel they are not aware enough about the steps they can take to reduce waste and recycle more.

One reason for this could be that as awareness of the costs of waste and the pressure from society and government increase for SMEs, they are realising they are not well enough informed about the steps they can take to reduce waste and recycle more. It appears that as SME awareness and willingness to act rises, SMEs are realising they don't know the next steps.

Figure 14: Awareness of how to better manage waste and recycling



Q10. How aware is your organisation about the steps you can take to better manage your waste and recycling?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

It is in the accommodation/cafes/restaurants and the property/retail/business services sectors where this realisation has impacted mostly. Both these sectors fell from 38% who thought themselves very well aware to only 21% (a fall of 17%). In the overall sample most of the shift was from 'very well aware' to 'fairly aware'; but in these two sectors the shift was to 'not that aware'.

Table 14: Awareness of better waste management-by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Very well aware	34	25	38	21	36	32	24	21	29	29	27	22	35	27	38	21	44	33
Fairly aware	48	55	42	46	49	50	56	50	47	49	50	63	49	44	53	58	39	54
Not that aware	11	14	11	21	7	12	12	25	15	15	13	11	13	21	8	17	11	5
Not at all well aware	5	4	6	6	3	7	6	3	4	4	9	4	3	5	1	2	5	5
Don't know	2	1	2	6	5	0	1	1	4	3	1	0	1	3	0	1	1	2

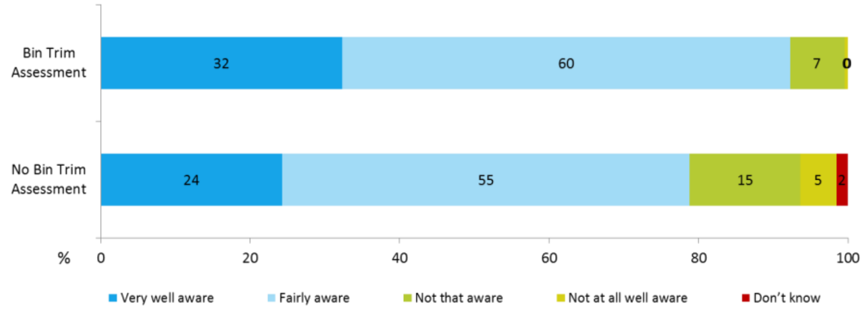
Higher than total at 95% CI
Lower than total at 95% CI

Q10. How aware is your organisation about the steps you can take to better manage your waste and recycling?
Base: *Total sample (n=639), Accommodation/cafes/restaurants (n=81), Retail trade (n=75), Wholesale trade (n=78), Finance/insurance (n=78), Manufacturing (n=78), Health/community services (n=78), Property/rental/business services (n=89), Government administration/ defence (n=82).*

Awareness of how to better manage waste and recycling - Bin Trim vs non-Bin Trim

Ninety-two per cent of SMEs who have had a Bin Trim assessment are fairly or very aware about the steps they can take to better manage their waste and recycling, while only 79% of SMEs who have not had a Bin Trim assessment have a similar level of awareness.

Figure 15: Awareness of better waste management



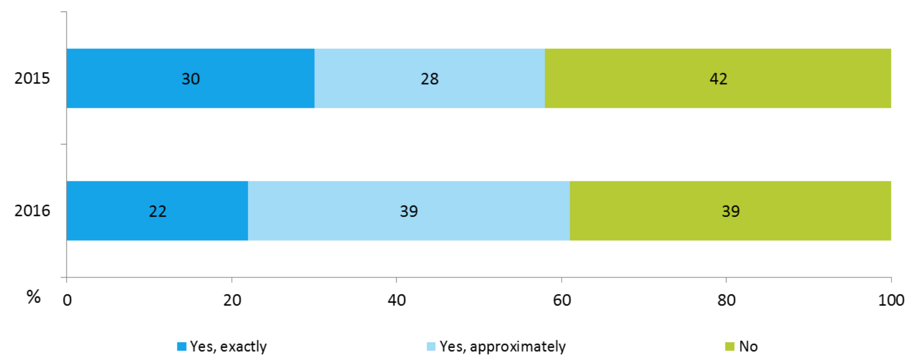
Q10. How aware is your organisation about the steps you can take to better manage your waste and recycling?
Base: *Those SMEs who have had Bin Trim Assessment 2016 (n=83); Those SMEs who have not had Bin Trim Assessment 2016 (n=520)*

The cost of waste and recycling per year

Sixty-one per cent of SMEs know approximately how much they pay for waste and recycling services per year. More SMEs (61% in 2016 compared to 58% in 2015) report knowing, at least approximately, what is being paid for waste and recycling.

However the percentage of those knowing the exact costs has fallen from 30% to 22%, a statistically significant downward shift. This result is also key to understanding the results as it indicates an overall greater awareness of waste and recycling costs while at the same time highlighting the fact they don't know the exact costs of their waste and recycling.

Figure 16 The cost of waste and recycling per year



Q11. Do you know how much your organisation pays for waste and recycling per year?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Those SMEs in the retail trade and the manufacturing sectors report a large fall in knowing exactly the costs of waste and recycling (down 15% and 16% respectively). The retail sector is more likely to know their approximate spend on waste and recycling activities compared to the last wave (up 20% to 43%).

Table 15: The cost of waste and recycling per year

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes, exactly	30	22	23	23	36	21	21	26	23	18	36	20	26	12	26	20	33	35
Yes, approximately	28	39	30	33	23	43	40	45	35	25	36	51	26	38	18	31	18	32
No	42	39	47	43	41	36	40	29	42	57	28	29	49	51	56	49	49	33

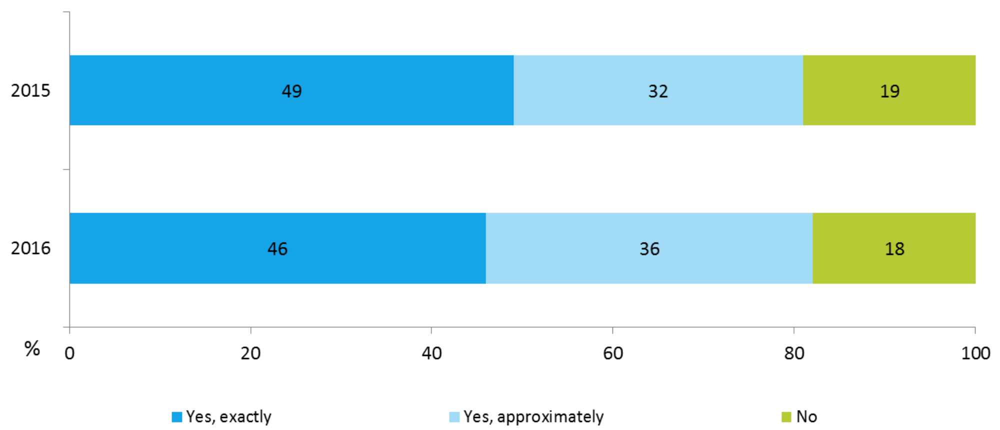
Higher than total at 95% CI
Lower than total at 95% CI

Q11. Do you know how much your organisation pays for waste and recycling per year?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/ defence (n=57).*

Awareness of the causes of waste

While knowledge of the exact cost of waste and recycling has fallen in 2016, there has been no statistically significant change in knowing exactly where the waste is being produced. Forty-six per cent of SMEs know exactly what parts of their operation produce the most waste, 36% know approximately, and 18% don't know. None of these changes are statistically significant.

Figure 17 Awareness of causes of waste



Q12. Do you know what parts of your operation produce the most waste?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Awareness of causes of waste - by sector

The proportion of SMEs claiming they know exactly where waste is being produced has fallen for the accommodation/cafés/restaurants, the retail trade, and the health and community services sectors (down 16%, 29% and 23% respectively since last year).

Table 16: Awareness of causes of waste - by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes, exactly	49	46	56	40	71	42	51	49	40	52	45	53	54	31	51	46	43	42
Yes, approximately	32	36	27	43	20	41	31	41	35	23	44	36	32	43	27	32	24	40
No	19	18	17	17	9	17	18	11	26	25	12	12	14	26	22	22	33	18

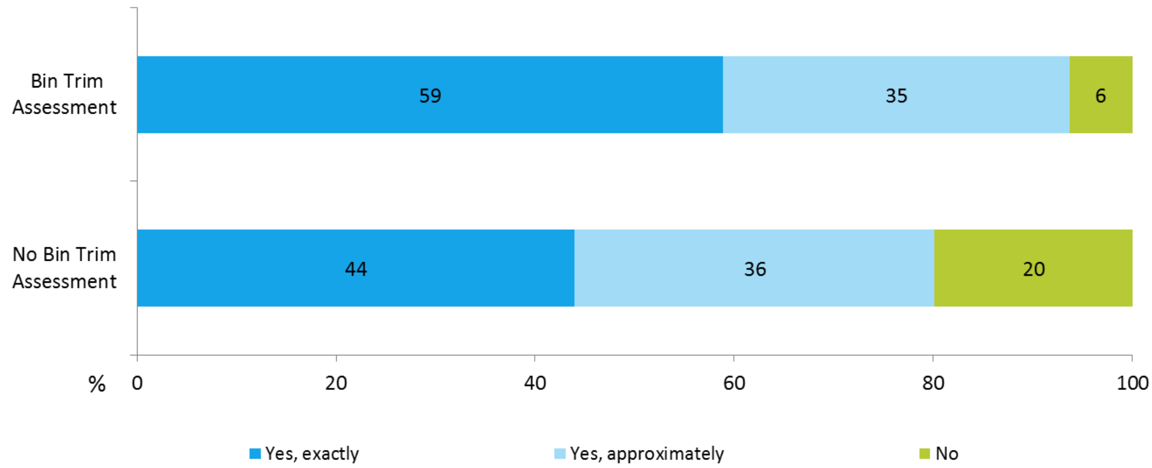
Higher than total at 95% CI
Lower than total at 95% CI

Q12. Do you know what parts of your operation produce the most waste?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=78), Manufacturing (n=78), Health/community services (n=78), Property/rental/business services (n=89), Government administration/ defence (n=82).*

Assessed by Bin Trim versus not assessed

Fifty-nine per cent of SMEs who have had a Bin Trim assessment know exactly what parts of their operation produce the most waste compared to only 44% of SMEs that are yet to have a Bin Trim assessment. In fact very few with a Bin Trim assessment say they don't know the parts of their operation that produce the waste (6% compared to 20% of SMEs yet to have a Bin Trim assessment).

Figure 18 Awareness of causes of waste – Bin Trim assessment vs. no Bin Trim assessment



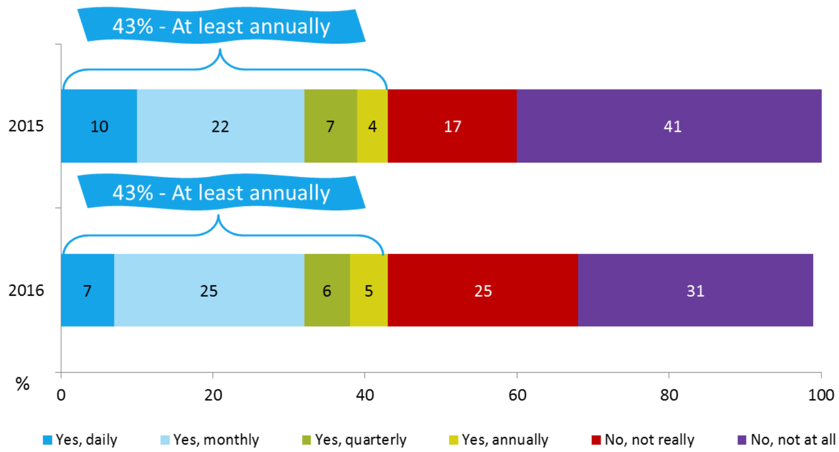
Q12. Do you know what parts of your operation produce the most waste?
Base: *Those SMEs who have had Bin Trim Assessment 2016 (n=83); Those SMEs who have not had Bin Trim Assessment 2016 (n=520)*

7. Monitoring waste and recycling

Tracking waste volume

In 2016 forty-three per cent of SMEs keep track of the volume of waste they are producing at least annually. This is the same as the 2015 results. Twenty-five per cent track monthly (up 3% since 2015). This change is not statistically significant.

Figure 19 Tracking waste volume



Q13. Does your organisation keep track of the volume of waste it produces?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

There has been a slight increase in interest in the volume of waste with fewer SMEs reporting a 'no, not at all' attitude to monitoring the volume of waste. It has shifted mainly to a response of 'no, not really' (up 8%)—a minor shift but in the right direction.

Table 17: Tracking waste volume -by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes, daily	10	7	19	9	13	12	5	8	5	5	12	9	6	4	7	4	13	7
Yes, monthly	22	25	17	19	20	24	22	24	21	9	23	28	17	14	24	27	23	37
Yes, quarterly	7	6	12	16	4	11	3	8	8	6	9	5	8	10	3	4	6	5
Yes, annually	4	5	4	2	1	3	4	5	3	3	5	4	1	1	1	10	7	9
No, not really	17	25	15	27	15	20	15	26	15	34	18	29	22	29	21	23	10	14
No, not at all	41	31	33	27	47	32	51	29	49	43	33	25	46	42	44	32	40	28

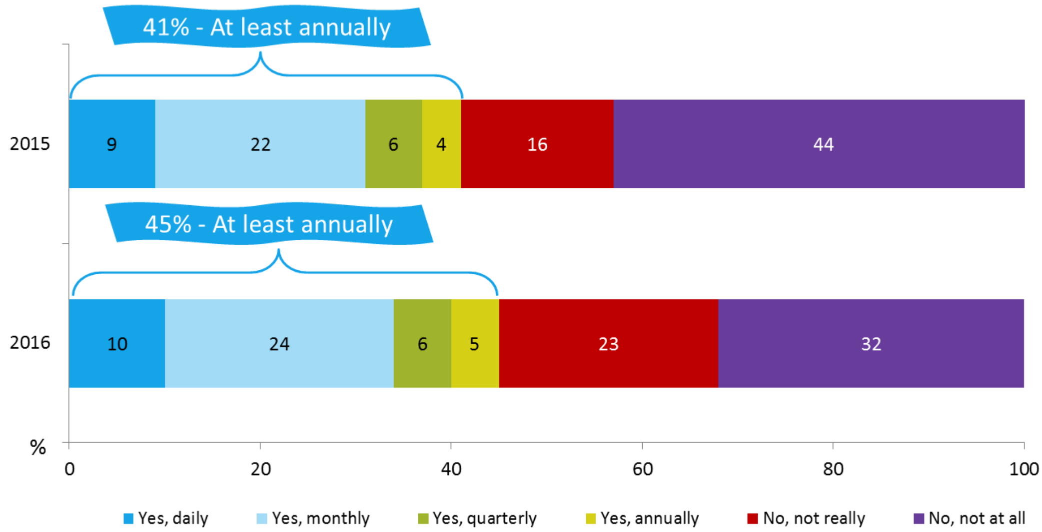
Higher than total at 95% CI
Lower than total at 95% CI

Q13. Does your organisation keep track of the volume of waste it produces?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/ defence (n=57).*

Tracking recycling

Forty-five per cent of SMEs keep track of how much they recycle at least annually. Ten per cent now keep track daily. Daily and monthly recycling tracking is up 3%, again not statistically significant but in the right direction.

Figure 20 Tracking recycling



Q14. Does your organisation keep track of how much it recycles?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

There has been a slight increase in interest in how much waste is recycled with fewer SMEs reporting a 'no, not at all' attitude to monitoring the volume of waste (down 12%). It has shifted mainly to a response of 'no, not really' (a rise of 7%).

Table 18: Tracking recycling - by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes, daily	9	10	17	7	13	9	4	8	4	6	10	11	6	4	3	15	13	11
Yes, monthly	22	24	12	15	17	30	13	18	22	1	24	26	15	18	27	21	21	35
Yes, quarterly	6	6	5	16	7	7	5	7	6	9	6	4	6	10	4	5	6	2
Yes, annually	4	5	2	4	3	3	3	5	4	4	5	5	3	0	2	7	7	9
No, not really	16	23	19	27	13	17	26	29	17	29	15	29	14	25	18	19	11	11
No, not at all	44	32	44	31	47	34	50	33	47	42	38	25	55	43	45	33	41	33

Higher than total at 95% CI
Lower than total at 95% CI

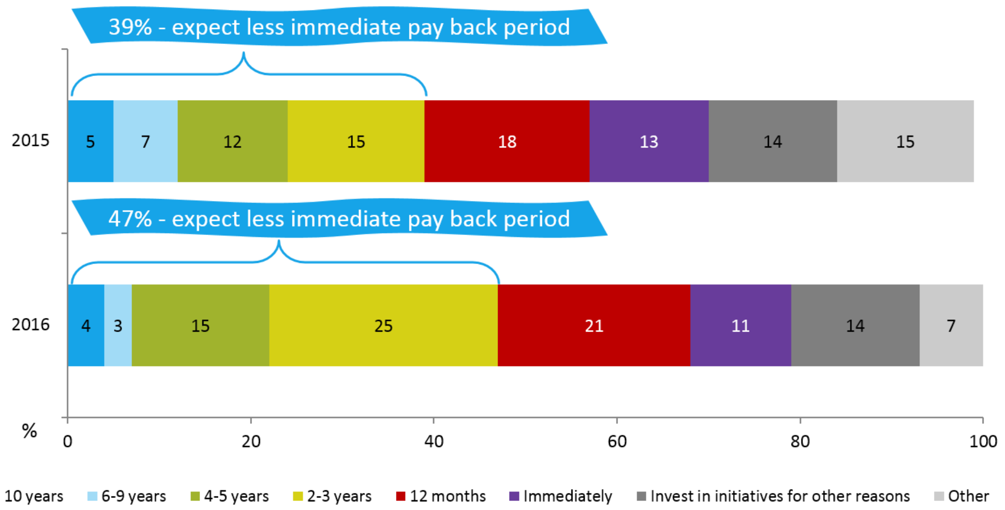
Q14. Does your organisation keep track of how much it recycles?
Base: *Total sample (n=639), Accommodation/cafes/restaurants (n=81), Retail trade (n=75), Wholesale trade (n=78), Finance/insurance (n=78), Manufacturing (n=78), Health/community services (n=78), Property/rental/business services (n=89), Government administration/ defence (n=82).*

Waste reduction measures

Return on investment

SMEs are more open to a longer term pay-back for investments in waste and recycling measures. Forty-seven per cent now have a longer payback expectation (than in the 2015 results) of 2–3 years to 10 years. This is an improvement of 8% which is statistically significant. Now, 25% of SMEs want their investment in waste reduction measures to pay for itself in 2–3 years. This is up by 10% on the 2015 results when it was 15%.

Figure 21 Return on investment



Q16. If your organisation were to invest in waste reduction measures (such as a new recycling system, or a new piece of recycling equipment like a baler), over what period of time would you want the measures to pay for themselves?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

More SMEs in the accommodation/cafes/restaurants and the health and community services sectors (18% and 21% respectively) accept a longer investment pay-back period of 2–3 years than was the case in 2015.

instinct and reason

Table 19: Return on investment – by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Would invest if there was a net financial benefit within 10 years	5	4	5	5	8	5	3	1	5	4	3	4	4	4	4	5	10	2
Would invest if there was a net financial benefit within 6-9 years	7	3	6	6	8	7	4	4	6	3	8	3	4	3	7	2	9	4
Would invest if there was a net financial benefit within 4 -5 years	12	15	5	10	13	18	9	16	9	16	15	17	13	12	13	10	9	19
Would invest if there was a net financial benefit within 2-3 years	15	25	10	28	13	18	19	33	19	15	18	26	8	29	12	25	16	28
Would need to have a return on investment within 12 months	18	21	25	20	19	18	24	24	17	23	26	29	19	19	12	22	10	7
Would need to have significant savings immediately	13	11	12	17	8	9	10	9	18	14	8	8	22	16	22	16	9	5
Would invest in initiatives for other reasons, not driven by financial return	14	14	25	11	8	14	10	8	13	20	10	8	13	14	18	14	17	21
Other	15	7	12	2	23	9	21	5	13	5	13	5	18	4	10	6	22	14

Higher than total at 95% CI
Lower than total at 95% CI

Q16. If your organisation were to invest in waste reduction measures (such as a new recycling system, or a new piece of recycling equipment like a baler), over what period of time would you want the measures to pay for themselves?

Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/defence (n=57).*

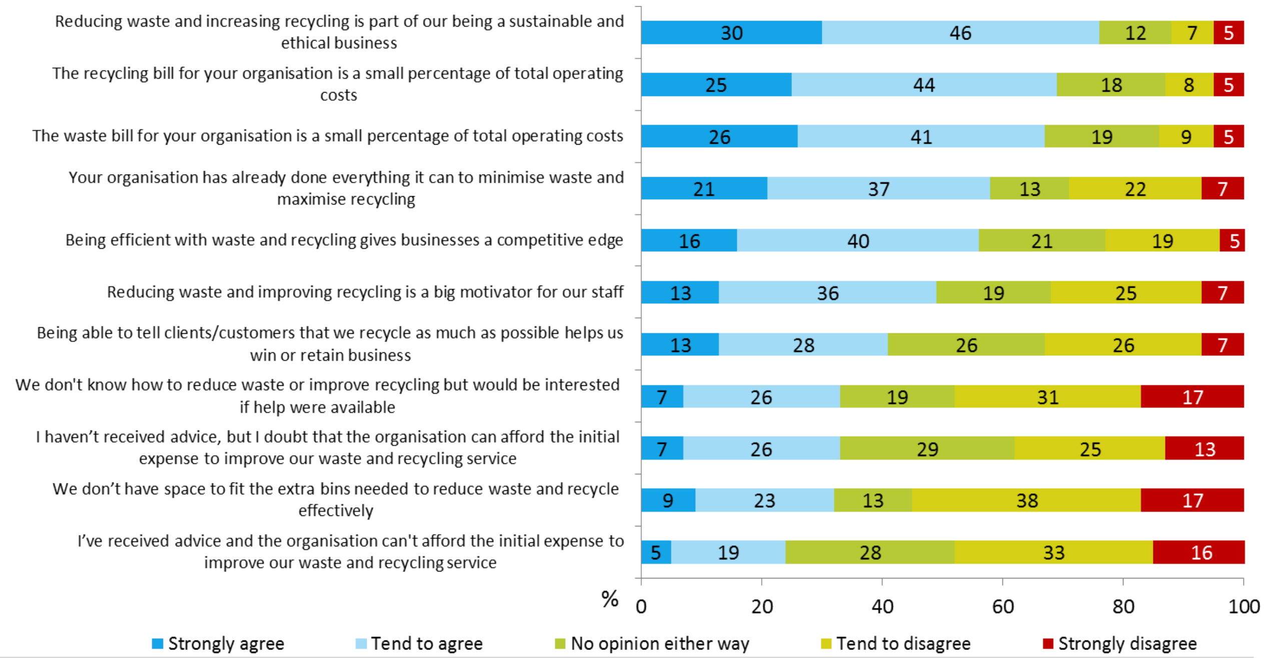
8. Attitudes to waste and recycling

There are a number of important key points surrounding SME attitudes to waste and recycling. They include:

- Fewer SMEs believe their organisation has done all it can to minimise waste and maximise recycling (down 10%). This is a statistically significant shift.
- Waste and recycling is 'part of being a sustainable and ethical business' remains widely accepted (76% agree).
- The recycling bill remains a 'small part of the overall operating costs' (presumably not a priority area of focus); 69% of SMEs agree.
- Similarly 'the waste bill is a small percentage of operating costs' (so also not a priority area of focus) (67% of SMEs agree although this has fallen 4% in 2016). This is not statistically significant.
- Fifty-five per cent of SMEs agree that 'being efficient with waste and recycling gives a competitive edge' (up 2% in 2016). This is not statistically significant.

Thirty per cent of SMEs strongly agree that their waste and recycling efforts are part of being a sustainable and ethical business.

Figure 22 SME attitudes towards waste and recycling



Q17. To what extent do you agree or disagree with the following statements...
Base: *Total sample 2016 (n=603)*

The fall in the number of SMEs believing all that could be done has been done has come mainly from the property/rental and business services sector (down from 72% in 2015 to 54% in 2016). The other change is in the manufacturing sector where the barrier of insufficient space to fit extra bins has fallen from 42% to 21% in 2016.

Table 20: SME attitudes towards waste and recycling – by industry sector

Strongly agree + Tend to agree	Total %		Accom./cafés/restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Reducing waste and increasing recycling is part of our being a sustainable and ethical business	77	76	75	73	72	74	82	74	71	77	73	74	72	70	82	80	84	77
The recycling bill for your organisation is a small percentage of total operating costs	69	69	64	62	68	67	76	66	67	66	71	72	65	62	74	75	66	65
The waste bill for your organisation is a small percentage of total operating costs	71	67	64	62	69	59	78	72	72	68	68	70	64	65	76	73	73	58
Your organisation has already done everything it can to minimise waste and maximise recycling	68	58	69	63	67	70	64	62	67	67	68	63	68	55	72	54	67	42
Being efficient with waste and recycling gives businesses a competitive edge	53	55	58	44	53	47	42	51	53	58	49	61	50	36	52	48	65	70
Reducing waste and improving recycling is a big motivator for our staff	51	49	49	41	53	50	44	47	46	56	47	46	47	39	51	47	63	60
Being able to tell clients/customers that we recycle as much as possible helps us win or retain business	40	41	47	44	39	41	40	39	37	37	37	43	31	27	47	40	39	47
We don't know how to reduce waste or improve recycling but would be interested if help were available	35	33	37	37	35	25	40	37	24	29	37	37	38	26	34	32	37	35
I haven't received advice, but I doubt that the organisation can afford the initial expense to improve our waste and recycling service	37	33	40	38	33	25	44	34	35	28	37	41	33	27	43	32	29	28
We don't have space to fit the extra bins needed to reduce waste and recycle effectively	37	32	37	35	37	32	33	41	26	37	42	21	45	36	35	43	35	28
I've received advice and the organisation can't afford the initial expense to improve our waste and recycling service	28	24	33	31	31	18	24	32	19	18	29	30	26	23	30	21	26	19

Q17. To what extent do you agree or disagree with the following statements...
Base: *Total sample 2015 (n=639); 2016 (n=603)*

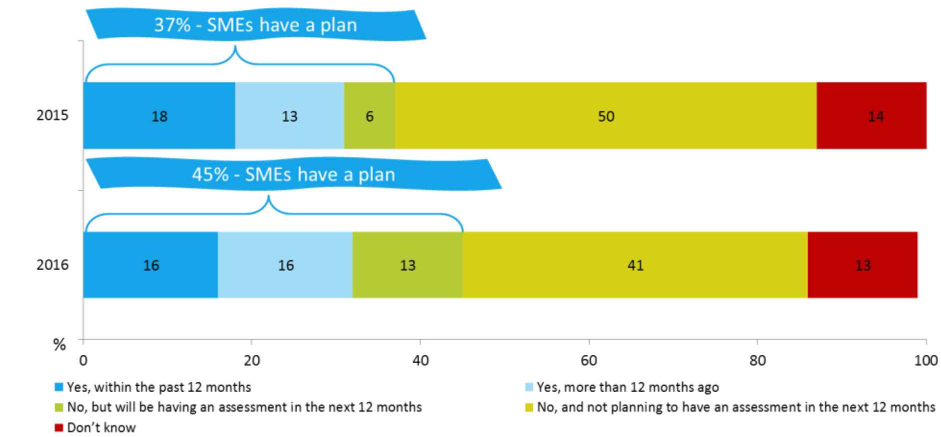
Higher than total at 95% CI
Lower than total at 95% CI

9. Actions undertaken

Waste and recycling audits/assessments

In 2016, 32% of surveyed SMEs have had a waste and recycling audit or assessment (not necessarily Bin Trim) completed (it was 31% in 2015) and 13% haven't but are planning to in the next 12 months (a 7% increase). Forty-one per cent of SMEs are not planning to have one done in the next 12 months, however this represents a statistically significant improvement on the 50% in 2015.

Figure 23 Waste and recycling audit - Done before



Q18. Has your organisation had a waste and recycling audit or assessment completed?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Those SMEs in the accommodation/cafés/restaurants sector are more likely to have had a waste and recycling audit/assessment done within the last 12 months (37% compared to 20% in 2015).

Table 21: Waste and recycling audit - Done before, by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes, within the past 12 months	18	16	20	37	15	25	15	14	14	11	21	18	17	10	15	11	21	21
Yes, more than 12 months ago	13	16	15	12	11	17	8	12	13	11	15	14	10	12	9	21	16	23
No, but will be having an assessment in the next 12 months	6	13	9	14	8	9	3	14	5	13	4	13	9	16	4	9	9	16
No, and not planning to have an assessment in the next 12 months	50	41	42	37	49	37	59	50	56	52	50	46	50	52	63	43	32	19
Don't know	14	13	15	20	17	12	15	9	12	13	10	8	14	10	9	11	23	21

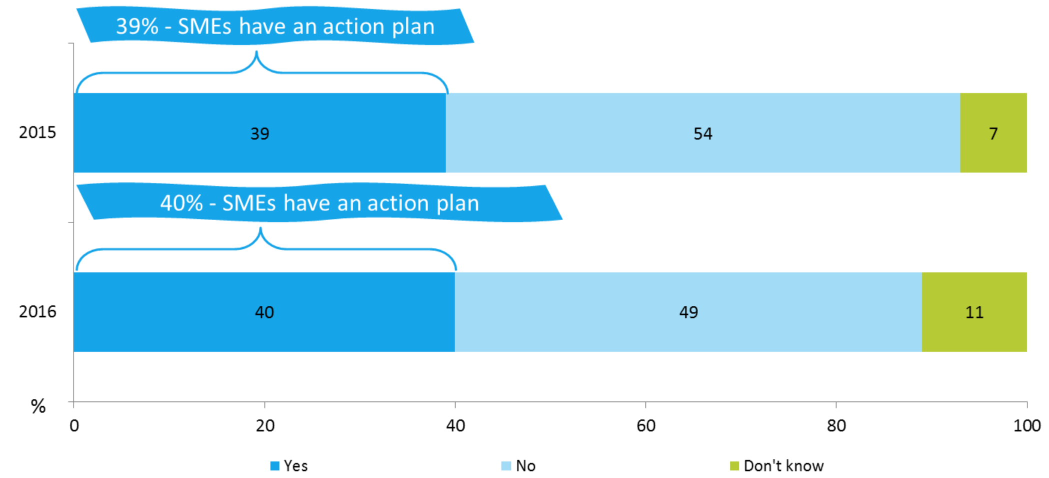
Higher than total at 95% CI
Lower than total at 95% CI

Q18. Has your organisation had a waste and recycling audit or assessment completed?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/ defence (n=57).*

Waste and recycling action plans

Forty per cent of SMEs report having a waste and recycling action plan. There has been no statistically significant change in the proportion of SMEs having a waste and recycling action plan.

Figure 24 Waste and recycling action plan



Q19. Has your organisation developed a waste and recycling action plan or was one developed for you?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

While overall there has been no statistical change, there are fewer in the accommodation/café/ restaurant sector that have an action plan or intend to have one.

Table 22: Waste and recycling action plan – by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes	39	40	51	33	28	37	29	36	38	34	38	43	42	32	42	31	44	56
No	54	49	38	54	60	49	62	59	55	56	59	49	47	57	53	58	46	26
Don't know	7	11	11	12	12	14	9	5	6	10	3	8	10	10	6	11	10	18

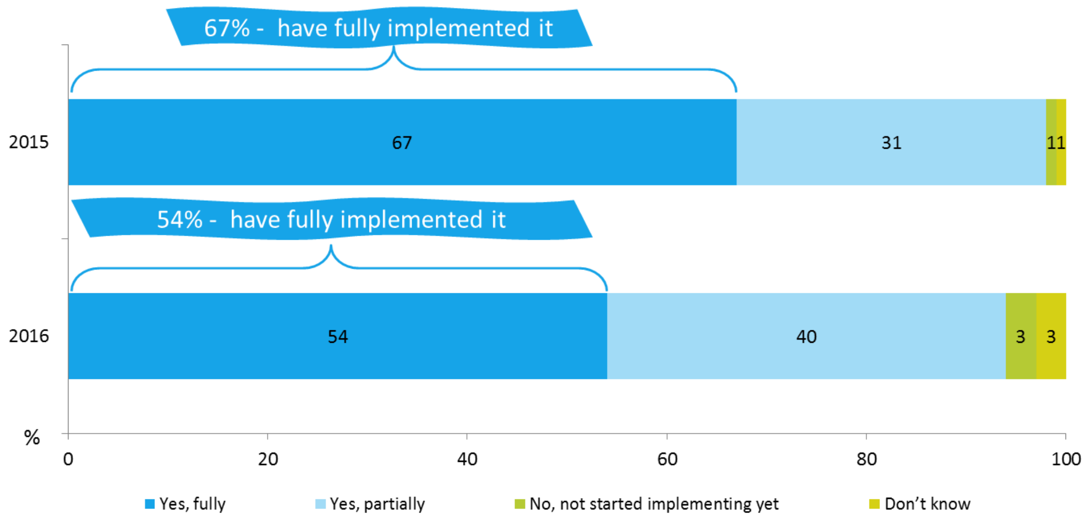
Higher than total at 95% CI
Lower than total at 95% CI

Q19. Has your organisation developed a waste and recycling action plan or was one developed for you?
Base: *Total sample 2015 (n=639); 2016 (n=603*

Have waste and recycling action plans been implemented?

There has been a fall in the proportion of SMEs who have fully implemented their waste and recycling action plan (now 54%, down 13% on 2015 results) and an increase in those partially implemented (up 9% on 2015 results to 40%).

Figure 25 Has the waste and recycling action plan been implemented?



Q20. Has your organisation implemented its waste and recycling action plan?
Base: *Total sample who developed action plan 2015 (n=251), 2016 (n=224).*

The results show a greater recognition among SMEs that waste and recycling action plans have only been partially implemented. This result ties into the lower awareness of the next steps in reducing waste and increasing recycling, a perception of greater difficulty in getting the tailored advice they need and the reduction in the view that the organisation has done all it can.

Table 23: Has the waste and recycling action plan been implemented? – By sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=251)	2016 (n=224)	2015 (n=41)	2016 (n=27*)	2015 (n=21*)	2016 (n=28*)	2015 (n=23*)	2016 (n=27*)	2015 (n=30)	2016 (n=27*)	2015 (n=30)	2016 (n=33)	2015 (n=33)	2016 (n=25*)	2015 (n=37)	2016 (n=25*)	2015 (n=36)	2016 (n=32)
Yes, fully	67	54	61	44	86	79	70	48	60	85	57	52	79	56	73	56	69	38
Yes, partially	31	40	34	48	14	18	26	48	37	15	43	42	21	40	24	40	25	50
No, not started implementing yet	1	3	5	4	0	0	4	4	3	0	0	0	0	4	0	4	3	9
Don't know	1	3	0	4	0	4	0	0	0	0	0	6	0	0	3	0	3	3

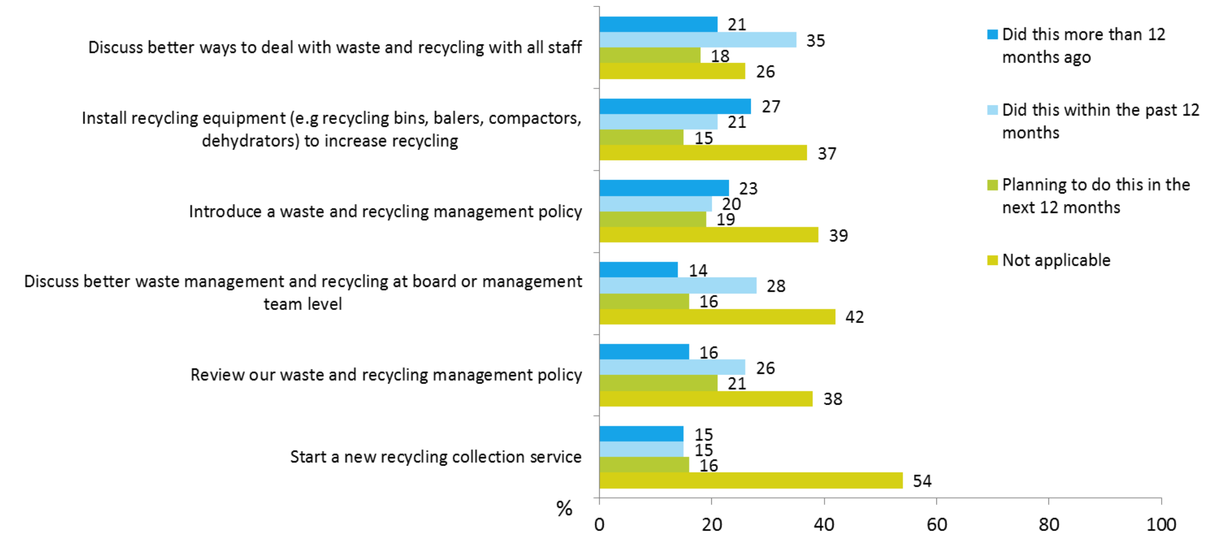
Higher than total at 95% CI
Lower than total at 95% CI

Q20. Has your organisation implemented its waste and recycling action plan?
Base: *Those who developed action plan; Total sample (n=224), Accommodation/cafes/restaurants (n=27*), Retail trade (n=28*), Wholesale trade (n=27*), Finance/insurance (n=27*), Manufacturing (n=33), Health/community services (n=25*), Property/rental/business services (n=25*), Government administration/ defence (n=32).*

Implementation of waste reduction and recycling methods

Twenty-one per cent of SMEs have installed equipment to increase their recycling within the past 12 months, while 35% have discussed better ways to deal with waste with their staff.

Figure 26 Waste reduction and recycling methods



Q21. Which of these has your organisation done or are you planning to do?
Base: *Total sample 2016 (n=603)*

There has been a number of positive and statistically significant shifts in implementation strategies planned for the next 12 months. They include 'introducing a waste and recycling management policy' (up 5% on 2015), and 'reviewing waste and recycling management policies' (up 7%).

Table 24: Waste reduction and recycling methods – by sector

Planning to do this in next 12 months %	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Introduce a waste and recycling management policy	14	19	11	19	7	7	13	20	9	11	17	20	14	27	13	19	18	23
Review our waste and recycling management policy	14	21	17	21	11	14	17	30	13	16	13	24	17	26	15	20	17	18
Discuss better waste management and recycling at board or management team level	15	16	20	14	5	11	14	17	13	14	17	16	13	19	12	16	23	18
Discuss better ways to deal with waste and recycling with all staff	16	18	22	16	7	11	22	26	13	18	19	17	12	30	11	21	23	12
Start a new recycling collection service	12	16	11	14	4	7	13	21	9	9	12	16	15	22	9	16	21	19
Install recycling equipment (e.g. recycling bins, balers, compactors, dehydrators) to increase recycling	12	15	15	12	4	4	5	12	5	10	15	18	8	16	9	16	20	18

Q21. Which of these has your organisation done or are you planning to do?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Higher than total at 95% CI
Lower than total at 95% CI

There has been a rise in the proportion of SMEs planning to review their waste and recycling management policies.

More SMEs in the health and community services sector are planning to discuss better ways to deal with waste and recycling with staff (up 18% to 30%).

Table 25: Waste reduction and recycling methods

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Introduce a waste and recycling management policy																		
More than 12 months ago	19	23	25	15	20	32	19	11	22	18	14	28	21	21	22	16	21	30
Within the past 12 months	17	20	25	23	19	26	10	21	15	22	17	21	15	12	15	19	22	16
Planning to do in next 12 months	14	19	11	19	7	7	13	20	9	11	17	20	14	27	13	19	18	23
Not applicable	50	39	40	43	55	36	58	49	54	49	53	32	50	40	49	47	39	32
Review our waste and recycling management policy																		
More than 12 months ago	14	16	15	11	12	20	9	5	14	13	9	21	18	12	15	14	24	16
Within the past 12 months	23	26	30	26	19	30	22	24	18	20	28	26	21	23	24	26	16	28
Planning to do in next 12 months	14	21	17	21	11	14	17	30	13	16	13	24	17	26	15	20	17	18
Not applicable	49	38	38	42	59	36	53	41	55	51	50	29	45	39	47	41	43	39
Discuss better waste management and recycling at board or management team level																		
More than 12 months ago	15	14	20	7	12	20	10	8	13	11	13	18	14	14	16	14	22	9
Within the past 12 months	24	28	26	35	27	30	18	26	23	20	29	29	27	16	22	32	17	32
Planning to do in next 12 months	15	16	20	14	5	11	14	17	13	14	17	16	13	19	12	16	23	18
Not applicable	45	42	35	44	56	39	58	49	51	54	41	37	46	51	49	38	38	42
Discuss better ways to deal with waste and recycling with all staff																		
More than 12 months ago	17	21	22	16	13	34	10	14	17	13	14	29	22	14	19	14	22	23
Within the past 12 months	28	35	30	40	31	36	24	24	24	32	29	36	31	29	30	38	23	39
Planning to do in next 12 months	16	18	22	16	7	11	22	26	13	18	19	17	12	30	11	21	23	12
Not applicable	38	26	26	28	49	20	44	36	46	38	37	18	36	27	39	27	32	26
Start a new recycling collection service																		
More than 12 months ago	14	15	15	11	17	14	10	11	13	15	15	22	8	10	13	15	18	9
Within the past 12 months	15	15	22	20	13	14	8	12	15	15	21	9	13	16	12	17	9	25
Planning to do in next 12 months	12	16	11	14	4	7	13	21	9	9	12	16	15	22	9	16	21	19
Not applicable	59	54	52	56	65	64	69	57	63	61	53	53	64	52	65	52	52	47
Install recycling equipment (e.g. recycling bins, balers, compactors, dehydrators) to increase recycling																		
More than 12 months ago	24	27	22	22	24	32	18	22	27	20	19	30	18	19	28	28	29	26
Within the past 12 months	18	21	23	27	15	21	14	20	15	20	21	17	18	21	19	23	18	26
Planning to do in next 12 months	12	15	15	12	4	4	5	12	5	10	15	18	8	16	9	16	20	18
Not applicable	46	37	40	38	57	43	63	46	53	49	45	34	56	44	44	32	33	30

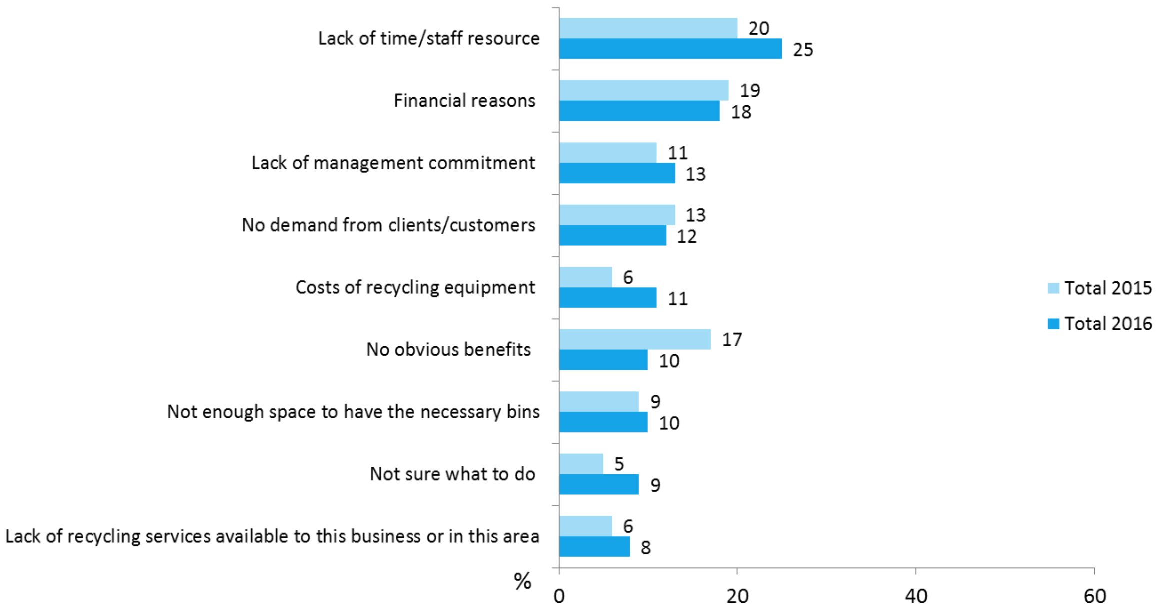
Q21. Which of these has your organisation done or are you planning to do?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

Higher than total at 95% CI
Lower than total at 95% CI

Barriers to change

The main barriers to reducing waste and increasing recycling identified by SMEs are their lack of time and limited staff resources (25%, up 5% on 2015), and financial constraints (18%). There was a statistically significant fall in SMEs citing 'no obvious benefits' (down 7% from 2015).

Figure 27 Primary barriers to changes in reducing waste and increasing recycling (1)



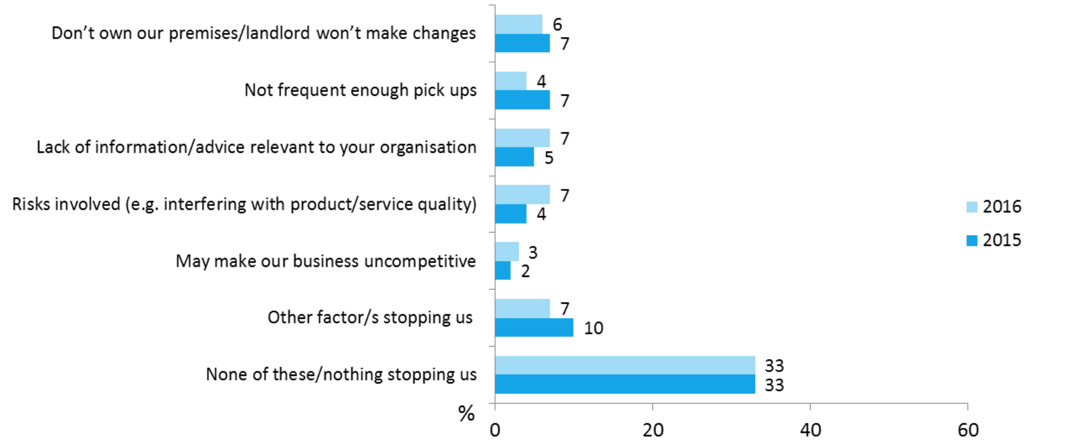
Q22. What, if anything, is **stopping you making changes** in your organisation to reduce waste and increase recycling?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

'Other' factors were mentioned by ten per cent of SMEs in 2015, now it's seven per cent in 2016. The other factors include many one off mentions such as:

- that it is not 'our' decision to make/Head Office decision/changing management
- council needs to implement waste and recycling for the whole town
- there is poor follow through from the waste companies [they come here and promise us a bin, never hear back/we have to put shrink wrap into general waste]
- depends on the products we have to sell at the time as they are constantly changing
- remote locations [reduced services], such as lack of facilities to recycle at a country tip/dump
- lack of staff commitment/interest, or
- the landlord won't let us/lease commitments or we are moving.

On the positive side: *"we are going paperless and there isn't anything to recycle"* or *"we are already doing it"*.

Figure 28: Secondary barriers to changes in reducing waste and increasing recycling (2)



Q22. What, if anything, is **stopping you making changes** in your organisation to reduce waste and increase recycling?
Base: *Total sample 2016 (n=603)*

The main change in barriers was the fall in the number of SMEs saying there were no obvious benefits in reducing waste and recycling. The proportion of SME's who believe this has fallen (from 17% to 10%). This fall has been most pronounced in the property/retail/business services sector (from 29% in 2015 to 10% in 2016). The wholesale trade sector also shows a fall in those reporting there is nothing stopping us reducing waste and increasing recycling (from 42% to 25%).

Table 26: Barriers to changes in reducing waste and increasing recycling – by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Lack of time/staff resource	20	25	27	30	15	20	21	29	18	29	22	21	24	27	18	25	16	30
Financial reasons	19	18	27	20	20	18	24	20	15	15	26	14	13	19	16	20	11	19
No obvious benefits	17	10	17	11	5	12	13	16	14	19	19	7	9	6	29	10	12	7
No demand from clients/customers	13	12	15	14	7	9	10	14	17	10	12	13	21	14	16	15	12	9
Lack of management commitment	11	13	11	11	13	8	12	16	12	16	10	9	12	14	7	15	17	16
Not enough space for necessary bins	9	10	10	14	4	9	10	16	6	10	10	7	8	18	11	14	6	5
Lack of information/advice relevant to your organisation	7	5	7	10	8	8	8	5	6	1	9	4	3	4	6	4	10	11
Risks involved (e.g. interfering with product/service quality)	7	4	9	2	4	3	1	5	8	4	6	4	15	5	4	2	11	4
Costs of recycling equipment	6	11	15	14	4	11	8	14	1	9	5	11	5	8	6	12	7	11
Lack of recycling services available to this business or in this area	6	8	7	11	4	9	5	11	6	6	5	4	1	13	8	9	9	9
Don't own our premises/landlord won't make changes	6	7	10	12	5	11	5	8	9	9	3	7	6	5	6	9	7	4
Not sure what to do	5	9	9	10	12	11	6	5	5	8	5	7	13	13	0	7	5	12
Not frequent enough pick ups	4	7	4	9	4	9	4	14	6	4	6	7	3	8	3	9	2	4
May make our business uncompetitive	3	2	5	2	1	3	1	3	0	2	4	3	0	4	1	0	6	2
Other factor/s stopping us	7	10	10	7	13	4	13	13	4	4	5	8	4	9	7	14	10	19
None of these/nothing stopping us	33	33	28	25	40	37	42	25	40	33	33	45	26	27	26	26	35	28

Q22. What, if anything, is **stopping you making changes** to reduce waste and increase recycling?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

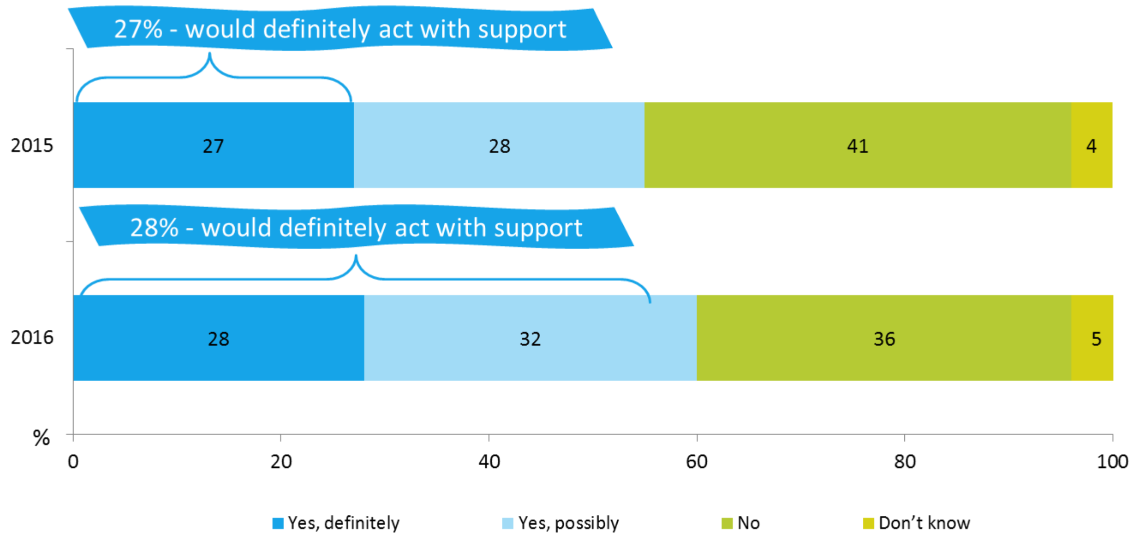
Higher than total at 95% CI
Lower than total at 95% CI

Impact of financial assistance

Twenty-eight per cent of SMEs would definitely install recycling equipment if they had financial assistance and 32% would possibly install recycling equipment if offered financial assistance.

These are not statistically significant shifts but again the results are moving in the right direction.

Figure 29: Impact of financial assistance - For installation of recycling equipment



Q23. Would financial assistance encourage you to install recycling equipment (Prompt if needed e.g. baler, compost unit, compactor, dehydrator)?
Base: *Total sample 2015 (n=639); 2016 (n=603)*

There are no statistically significant shifts or differences across any of the sectors.

Table 27: Impact of financial assistance – by sector

	Total %		Accom./cafés /restaurants %		Retail trade %		Wholesale trade %		Finance/ insurance %		Manufacturing %		Health/ comm. Services %		Property/ rental/ bus. Services %		Gov. admin/ defence %	
	2015 (n=639)	2016 (n=603)	2015 (n=81)	2016 (n=81)	2015 (n=75)	2016 (n=76)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=79)	2015 (n=78)	2016 (n=76)	2015 (n=78)	2016 (n=77)	2015 (n=89)	2016 (n=81)	2015 (n=82)	2016 (n=57)
Yes, definitely	27	28	37	27	21	30	29	24	13	18	33	34	15	17	27	30	32	25
Yes, possibly	28	32	27	40	33	29	29	43	29	28	36	33	31	34	21	28	17	30
No	41	36	31	28	39	32	35	29	58	47	29	30	49	45	47	40	44	35
Don't know	4	5	5	5	7	9	6	4	0	8	1	3	5	4	4	2	7	11

Higher than total at 95% CI
Lower than total at 95% CI

Q23. Would financial assistance encourage you to install recycling equipment (Prompt if needed e.g. baler, compost unit, compactor, dehydrator)?
Base: *Total sample (n=603), Accommodation/cafes/restaurants (n=81), Retail trade (n=76), Wholesale trade (n=76), Finance/insurance (n=79), Manufacturing (n=76), Health/community services (n=77), Property/rental/business services (n=81), Government administration/defence (n=57).*

10. Bin Trim communications

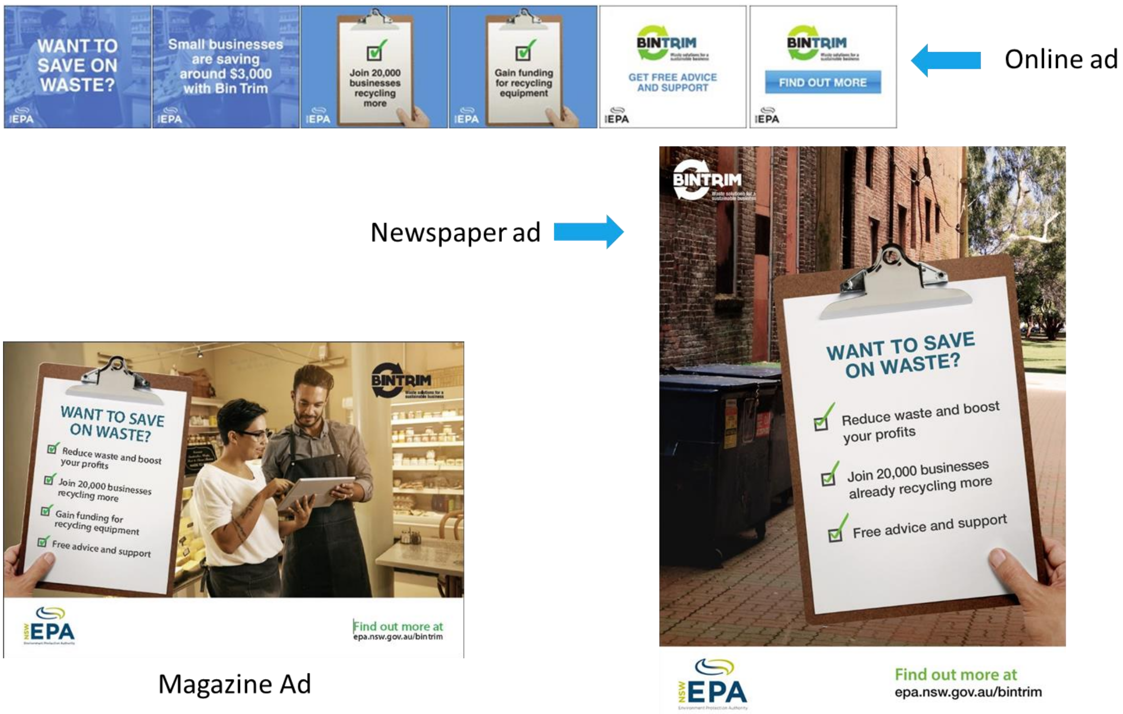
In this study the reach and recall of Bin Trim communications were tested.

Respondents were sent Bin Trim communication materials and asked whether they were aware of these communications at all.

They were then asked a small number of questions in an online survey that accompanied the images. Most completed the task but some had to be followed up with a telephone call.

The following materials were emailed to respondents providing examples of communications placed online, in newspapers and in magazines.

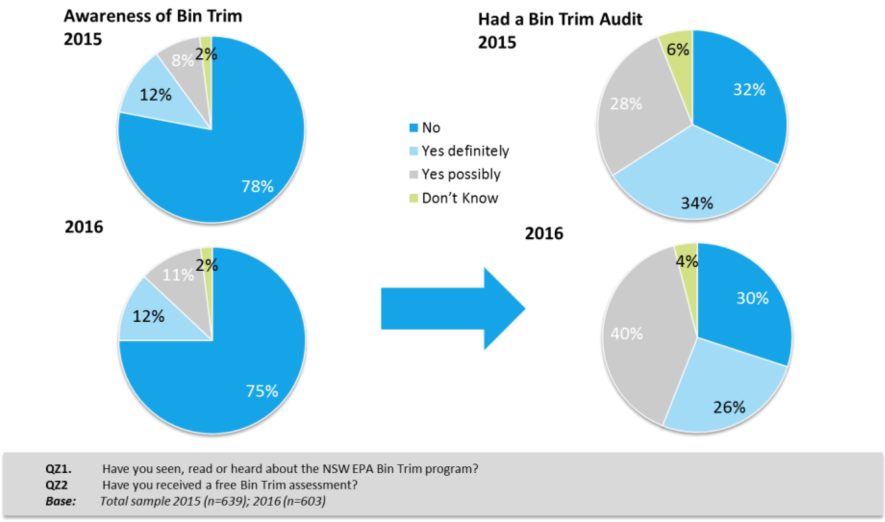
Figure 30: Examples of Bin Trim communications



Awareness and participation in Bin Trim program

Twenty-five per cent of SMEs were aware of the Bin Trim program. Of those aware, both possibly and definitely (15% of SMEs interviewed), 66% think they have either definitely or possibly had a Bin Trim assessment. Conversion from awareness to participation is very high.

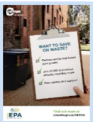
Figure 31: Awareness and use of Bin Trim - SMEs



Awareness of Bin Trim program communications

Awareness of the Bin Trim program communications was highest in newspapers (15%) and magazines (14%), with radio having the lowest recall (10%). Awareness of the Bin Trim program communications was highest in the property/retail and business services sector (23% for newspaper, 20% for magazines and 18% online) and lowest in the manufacturing sector (9% for newspapers, 11% magazines and 9% online).

Table 28: Awareness of Bin Trim Advertisements

% who said they had seen them	Total (n=603) %	Accom./cafés /restaurants (n=81) %	Retail trade (n=76) %	Wholesale trade (n=76) %	Finance/ insurance (n=79) %	Manufacturing (n=76) %	Health/ comm. Services (n=77) %	Property/ rental/ bus. Services (n=81) %	Gov. admin/ defence (n=57) %
 Newspapers	15	11	19	10	17	9	16	23	15
 Magazines	14	11	17	16	19	11	11	20	11
 Online	13	20	14	11	15	9	13	18	11
"Want to save on waste? Join 20,000 businesses recycling 13 per cent more with the NSW Government's Bin Trim program. You'll get free advice and support to help your business waste less and recycle more. Find out more at: epa.nsw.gov.au slash bintrim" (15 second radio advert) Radio	10	17	17	14	8	5	9	14	11

Q25. Below are some advertisements you might have seen previously. Please tell me if you have ever seen them.
Base: *Total Sample 2016 (n=603)*

Main message of the Bin Trim advertising

Respondents were shown a range of examples of program communications including having the radio ad read out to them and were asked "what is the main message these advertisements are trying to get across to you?"

The dominant response was that the communications had to do with reducing waste and to a lesser extent about recycling. Secondary themes included recycling, business, and saving money.

Figure 32: Responses to perceived key messages

Q26. What is the main message these advertisements are trying to get across to you?
Base: *Total Sample 2016 (n=603)*

SMEs expressed the main messages of the communications in the following way:

“Trying to reduce waste and to increase recycling”

“We can have a look at our business practices with waste management and recycle more. Don't have to spend a lot to reduce waste.”

“Reducing waste and getting businesses to see the benefits of being careful with waste/recycling. Being sustainable and being aware”

“Trying to reduce the waste in businesses and that it can save money. Everyone has to do their little bit”

“The program helps businesses to recycle more, thereby reducing their waste removal costs and increasing profit.”

“Assistance is available to reduce waste”

“Bin Trim is trying to get businesses to reduce their waste and find ways to recycle. It also is cost saving.”

“Recycling is easy and it is easy for everyone to do, especially business'. You can follow a few simple steps and it can be started or even improved on what you are doing now”.

The key themes are captured in the figure below. They include the ideas of reducing waste, increasing recycling, saving money, benefiting the environment and the fact there is help for business.

Table 29: Key campaign message take-out from the various Bin Trim advertising

Comments	Mentions (n=603)
Reduce waste. Waste management/ways to reduce waste	29%
Recycle more/recycling is important/good/helps	29%
Saves money/good for business/increases profits/good for small business	22%
EPA Providing assistance to business/Bin Trim helping business to recycle and reduce waste/visit website to get help/support available. EPA know s about recycling/visit website	12%
Those who are not recycling should/more should/need everyone to help	2%
Generally a good message/ informative, great message and good plan	<1%
Finance is available / get funding	<1%
Generally negative/derogatory	3%

Q26. What is the main message these advertisements are trying to get across to you?
Base: *Total Sample 2016 (n=603)*

11. Impact of the Bin Trim program

Bin Trim businesses were more likely to:

- know exactly how much their organisation pays for waste and recycling per year and exactly what parts of their operation produce the most waste.
- be very well informed about the information, advice and support that is available to help better manage waste and control waste removal and recycling costs.
- have utilised workshops and seminars, accredited training courses, online education programs, waste and recycling helplines and case studies for advice and support.
- have discussed better ways to deal with waste and recycling with all staff and have started a new recycling collection service within the past 12 months.

Profile of SMEs that were Bin Trim Assessed - 15% of SMEs

SMEs who have been assessed by Bin Trim (15% of those surveyed) were much more proactive in their waste management, and think of waste management as integral to the success of their business.

Table 30: Key differences between SMEs who have had a Bin Trim assessment and not had a Bin Trim assessment

Type of SME

- Government/administration/ defence sector
- Based in Sydney

Sources of information

- State or federal government websites
- Email alerts/electronic newsletters
- Handbooks/factsheets
- Telephone helplines
- Social media (Twitter, Facebook)

Waste management tools

- Paper and plastic recycling
- Compactor
- Dehydrator

Attitude

- Strongly agree/agree that being able to tell clients/customers that they recycle helps them win and retain business.
- Financial support would definitely encourage installation of recycling equipment
- Know waste and recycling costs and know where waste is produced
- Have actively sought information/advice/support
- Very well informed about the advice and support that is available to manage waste

Bin Trim assessed SMEs are different to other SMEs in many ways. These include:

The main decision maker for waste is likely to:

- be 35–44 years old (+15%; 27%)
- have the following role in business: Director/ Partner (+10%; 20%)

The business is more likely to:

- be based in Sydney (+14%; 59%)
- be in the Government administration/ defence (+11%; 16%) or Property/rental/business services sectors (+9%; 19%).

Behaviours

The business is more likely to:

- have recycling services/ equipment in place for: Plastic film (+15%; 41%), Paper (+10%; 84%); Co-mingled waste (+7%; 11%); Compactor (+10%; 7%); Dehydrator (+5%; 2%)
- be an organisation that keeps track of the volume of waste it produces quarterly (+11%; 6%) and monthly (+18%; 25%)
- be an organisation that keeps track of how much it recycles daily (+21%; 10%); and monthly (+9%; 24%)
- be an organisation that would invest in waste reduction measures: if it paid for itself within 10 years (+5%; 4%) if it paid for itself within 6-9 years (+9%; 3%), if it paid for itself within 4-5 years (+20%; 15%)
- have used: workshops and seminars (+ 27%; 19%); accredited training courses, (+21%; 15%); online education programs (+16%; 17%); waste and recycling helplines (+22%; 21%) and case studies of organisations who have reduced waste and increased recycling (+30%; 23%) for advice and support
- know exactly how much their organisation pays for waste and recycling per year (+15%; 22%)
- know exactly what parts of their operation produce the most waste (+13%; 46%)
- have discussed better ways to deal with waste and recycling with all staff within the past 12 months (+11%; 35%)
- have started a new recycling collection service within the past 12 months (+15%; 15%)
- have installed recycling equipment within the past 12 months or are planning to do so in the next 12 months (+12%; 21%).

Attitudes

The business is more likely to:

- be very well informed about the information, advice and support that is available to help better manage waste and control waste removal and recycling costs (+28%; 26%)
- believe that it's very easy to get tailored advice or support to better manage waste (+15%; 23%)
- have actively sought information/advice/support (+31%; 32%)
- strongly agree/agree that being able to tell clients/customers that they recycle as much as possible helps them win or retain business (+10%; 41%)
- have obtained info through state or federal government websites (e.g. EPA) (+21%; 32%), Emails (+14%; 28%), Electronic newsletters (+12%; 21%), Handbooks or factsheets (+9%; 20%), Radio or TV (+6%; 14%) or Telephone helplines (+15%; 12%) or Information via Facebook, twitter (+13%; 9%)

- be an organisation that had a waste and recycling audit or assessment completed: more than 12 months ago (+23%; 16%) and/or within the past 12 months (+14%; 16%)
- be an organisation that has developed a waste and recycling action plan or had one developed for them (+21%; 40%)
- be an organisation that has introduced a waste and recycling management policy within the past 12 months (+13%; 20%)
- say that financial assistance would encourage them to install recycling equipment - yes, definitely (+20%; 28%)
- say that if they had financial assistance they would then recycle more plastic film (+4%; 88%)
- identify the following factors as stopping them making changes in their organisation in regards to reducing waste and increasing recycling: lack of time/staff resource (+12%; 25%), financial reasons (+7%; 18%), not enough space to have the bins (+7%; 10%), and lack of management commitment (+15%; 13%).

12. How can a future Bin Trim program affect SME engagement?

The study tested four attributes of the Bin Trim program in the discrete choice model. It found that each of the attributes is relatively similar in its ability to drive engagement with the Bin Trim program. At a basic level the Bin Trim program without any extra features would engage about 16% of SMEs overall. This was higher for the wholesale trade (29%) and for the retail trade and the health/ community services sectors (both 25%).

The choice model revealed that greater levels of engagement could be achieved by tailoring the promotion of the Bin Trim program to include more appealing features.

The three most powerful influences on engagement with the Bin Trim program included access to 'help to implement the action plan with education materials and support to train staff ' (28% influence on choice), other supporting resources (26%) and creating a tailored action plan (24%).

The three engagement strategies found to be most effective in driving engagement were:

1. Get current waste service provider to assist them to '*implement their action plan with education materials and support to train staff*'. A DIY online training tutorial and a phone helpline to "*implement their action plan with education materials and support to train staff*" were next likely to engage SME's.
2. Action plan template/s – to assist the business type to know which actions to implement to reduce waste and increase recycling, appears the most potent supporting resource that Bin Trim could provide.
3. Having a third party (such as an officer from local council) to *assess waste and recycling needs and to create a tailored action plan.*

The choice model

All 603 respondents were read out four hypothetical offers and asked if this hypothetical program would cause them to participate in the Bin Trim program. There were 10 versions of these four cards that were carefully rotated across the entire sample.

The choice model estimates the demand for every possibility from the design matrix. The 'base case' is just one of these, as is the 'optimal solution'.

The next page details the hypothetical Bin Trim program that respondents were told about. Because the hypothetical scenarios needed to be read out the choice model was kept very simple with only four attributes.

The design chart in Table 31 shows all the attributes of the program offer tested and, for each attribute, the different 'levels' that were used in the hypothetical offers.

The task

As read to survey respondents:

We have another, very important part of the study.

We will now tell you four different scenarios that the NSW EPA could provide to businesses to support them to reduce waste and recycle more in the future.

We want to know if you would use these services or resources if the NSW EPA offered them. This will take a just few minutes.

Remember each scenario may look alike, but each is actually different. All you need to do is review whether the scenario would lead you to use the service or resource, and tell us your choices.

You may see some terms used that you are not familiar with. To help you, we will tell you the ***definitions*** *before starting these four different scenarios.*

Key features and levels of the scheme – the design

Cells highlighted in orange indicate the 'base case' that is matched to the worst scenario. This 'base case' is used for comparison purposes with other alternative product configurations.

Table 31: Key features and levels tested in the choice model section

Attributes	Level 1	Level 2	Level 3	Level 4	Level 5
1. Assess waste and recycling needs and create a tailored waste reduction action plan for your business	DIY – using an online tool	Service provided by your current waste service provider	Service provided by a third party such as an officer from your local council	Service provided by a business enterprise centre or other business advisor	No assessment
2. Implement your action plan – education materials and support to train staff	DIY - with an online training tutorial and a phone helpline	Service provided by your current waste service provider	Service provided by a third party such as an officer from your local council	Service provided by a business enterprise centre or other business advisor as part of a broader suite of services they offer to businesses	No support
3. Implement your action plan – support to set up a new recycling system	DIY - with an online training tutorial and a phone helpline	Service provided by your current waste service provider	Service provided by a third party such as an officer from your local council	Service provided by a business enterprise centre or other business advisor as part of a broader suite of services they offer to businesses	No support
4. Supporting resources	Action plan templates - templates to assist your business type to know which actions to implement to reduce waste and increase recycling	Industry benchmarks – factsheets and online interactive tools to help you identify the average waste and recycling rate for your business type.	Online video interviews with managers of businesses like yours telling you how they reduced waste, increased recycling and saved money.	A factsheet/online resource to help you understand your rights and responsibilities under a waste/recycling contract.	No supporting resource

Base case/worst case scenario – no change in Bin Trim offer

The choice model tested 625 hypothetical Bin Trim programs to enable the model to estimate each of the possible combinations. The worst case, with no extra program elements, still attracted 16% of SMEs indicating a latent desire amongst SMEs for better recycling and waste avoidance strategies.

Table 32: Base case scenario

	Key aspects of Bin Trim program
1. Assess waste and recycling needs and create a tailored waste reduction action plan for your business	No assessment
2. Implement your action plan – education materials and support to train staff	No support
3. Implement your action plan – support to set up a new recycling system	No support
4. Supporting resources	No supporting resource

Q: Is this is a program your business would participate in over the next 12 months?

Yes	No
16%	84%

Base: Total sample (n=603)

Engagement with Bin Trim increases as new elements of the program are added to the offer. The choice model predicts significant increased participation with Bin Trim with additional features.

If Bin Trim provided two additional initiatives such as (1) *Implement your action plan - educational materials that support and train staff* provided by their current WSP plus (2) *Action Plan templates to help their type of business know the actions they need to take to reduce waste and increase recycling*, then intention to participate in Bin Trim increases from 16% to 42%.

If the Bin Trim program provided the four additional initiatives as shown in Table 33, then interest in participating in Bin Trim rises from 16% to 57%.

These are just two scenarios from hundreds of possibilities. An interactive tool has been provided to the Bin Trim program that allows any combination to be tested. This is an important tool because the analysis shows that there are differences in the impact that these initiatives have in various industry sectors.

Key drivers of participation in Bin Trim

The Bin Trim attributes tested were all able to influence participation with the Bin Trim program. Attribute 2 *(Implement your action plan – education materials and support to train staff*) was marginally more effective and accounts for twenty-eight per cent of the reason an SME would participate in the Bin Trim program.

For this attribute, assistance with the staff education process by their current WSP provider was the best solution but it was very closely followed by a Do It Yourself (DIY) online training tutorial and helpline. The other strongest innovations for each attribute are outlined in the figure below.

Please note the results outlined below are aggregated and the best fit for SMEs overall. If tailored strategies are employed for each sector then even more optimal solutions can be found.

Table 33: Relative impact on program demand for each attribute

28%	• Attribute 2: Implement your action plan - education materials and support to train staff (Level 3 WSP taking this role [11.5%], closely followed 1 DIY with online training tutorial and phone helpline [11.2%])
26%	• Attribute 4: Supporting resources (Level 1 action plan templates)
24%	• Attribute 1: Assess waste and recycling needs and create a tailored waste reduction action plan for your business (Level 3 service provided by a third party e.g. local council)
23%	• Attribute 3: Implement your action plan - support to set up a new recycling system (Level 3 service provided by a third party e.g. local council)

Base: Total sample (n=603)

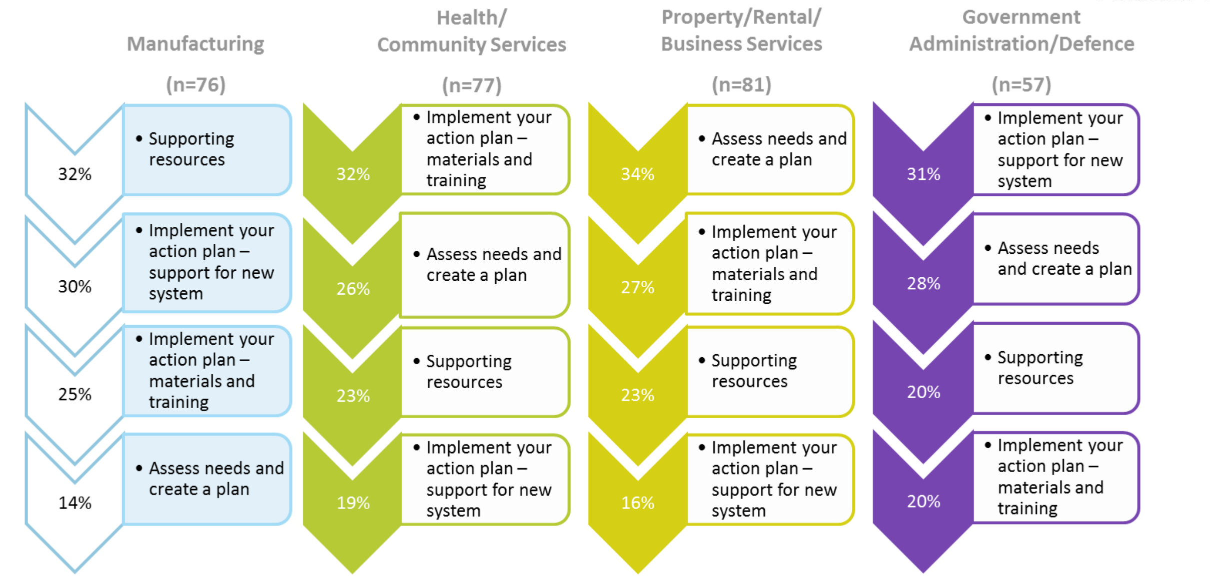
Key drivers of participation for SMEs (1) - by sector

The following figures show the top four enhancements for each of the eight industry sectors.

Table 34: Base case scenario by sector showing proportion of demand driven by each attribute

Accommodation/ cafes/restaurants (n=81)		Retail Trade (n=76)		Wholesale Trade (n=76)		Finance/Insurance (n=79)	
34%	• Implement your action plan – support for new system	46%	• Supporting resources	74%	• Implement your action plan – materials and training	33%	• Implement your action plan – materials and training
32%	• Assess needs and create a plan	30%	• Implement your action plan – materials and training	16%	• Assess needs and create a plan	32%	• Supporting resources
24%	• Implement your action plan – materials and training	23%	• Assess needs and create a plan	10%	• Implement your action plan – support for new system	25%	• Assess needs and create a plan
11%	• Supporting resources	1%	• Implement your action plan – support for new system	0%	• Supporting resources	11%	• Implement your action plan – support for new system

Base: Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).

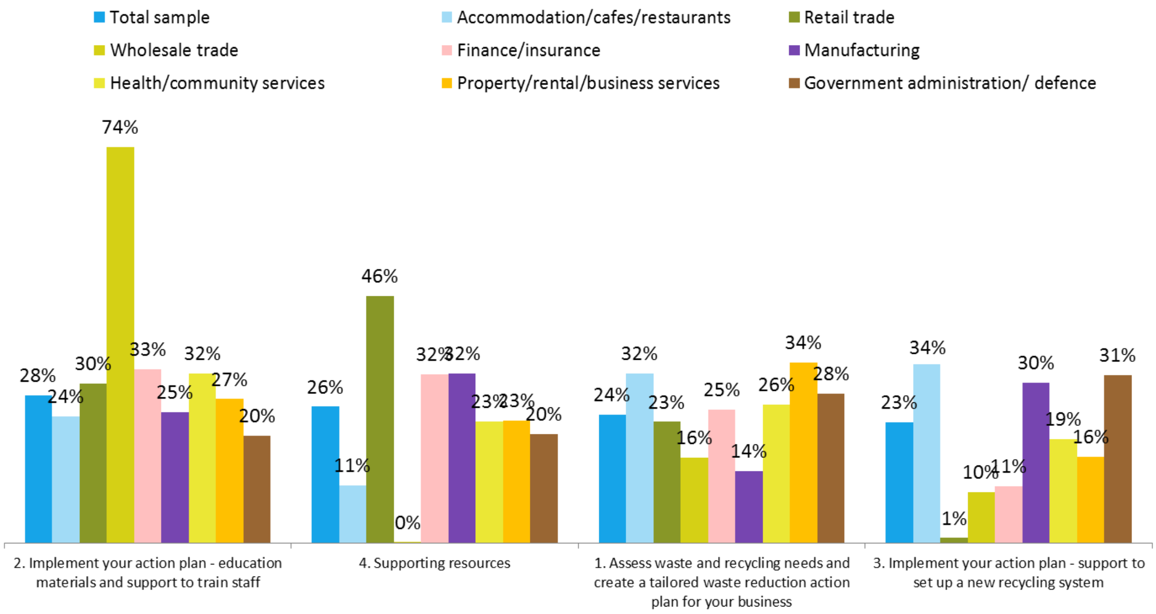


Base: Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).

Key drivers of participation in Bin Trim

This figure provides estimates of the impact on participation for each sector for all industry sectors.

Figure 33: Key drivers of participation with Bin Trim



Base: Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).

Attribute 2 'Implement your action plan - education materials and support to train staff'

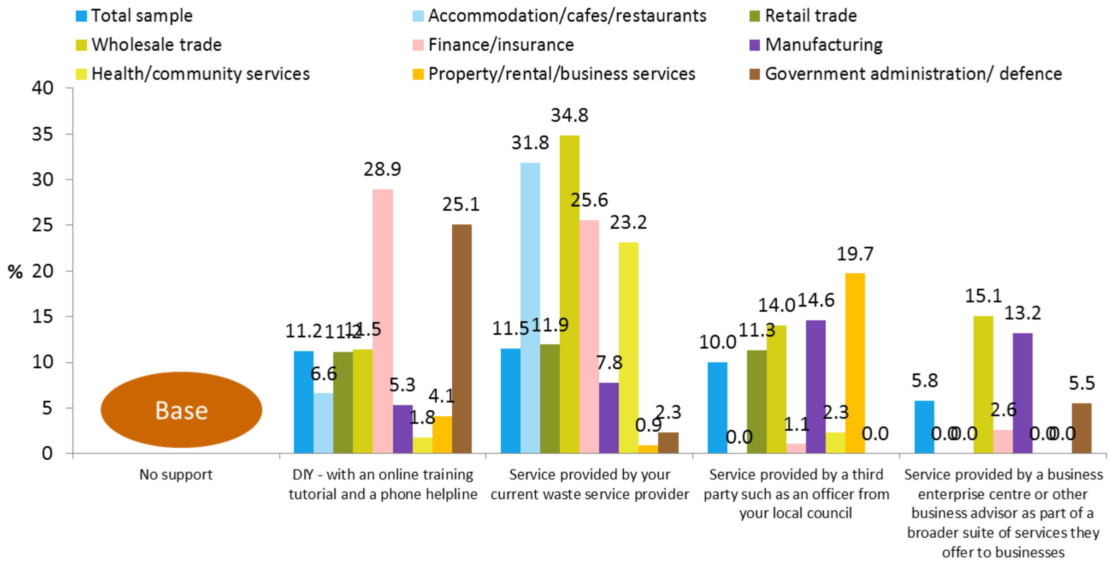
A Bin Trim program with no support from any source to help SMEs educate their staff about reducing waste and recycling represents the base case against which all other impacts are measured relatively. All other results show the added participation that the Bin Trim program might expect for each industry sector.

The total sample model shows a high preference for *Implement your action plan – with* education *materials and support to train staff* supplied by the SME's current waste service provider (showing an 11.5% rise in likely participation in the Bin Trim program). This is followed closely by a DIY online training tutorial with a phone helpline (11.2% rise in likely participation in the Bin Trim program) and staff education provided by a third party such as an officer from the local council (10% rise in likely participation in the Bin Trim program).

The Wholesale trade SMEs show an extremely strong interest in staff education materials supplied by their current waste service providers (showing a 34.8% rise in likely participation in the Bin Trim program). This was thirty-one point eight per cent for the Accommodation/Cafes/restaurants sector.

The Finance/insurance SMEs prefer the assistance of a DIY online training tutorial with a phone helpline (28.9%). The Property/rental and business services sector had a strong preference for attribute 2 to be provided by a third party such as the local council (and would generate a 19.7% increase in their participation).

Figure 34: How does attribute 2 'education materials and support to train staff', influence participation?



Base: Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).

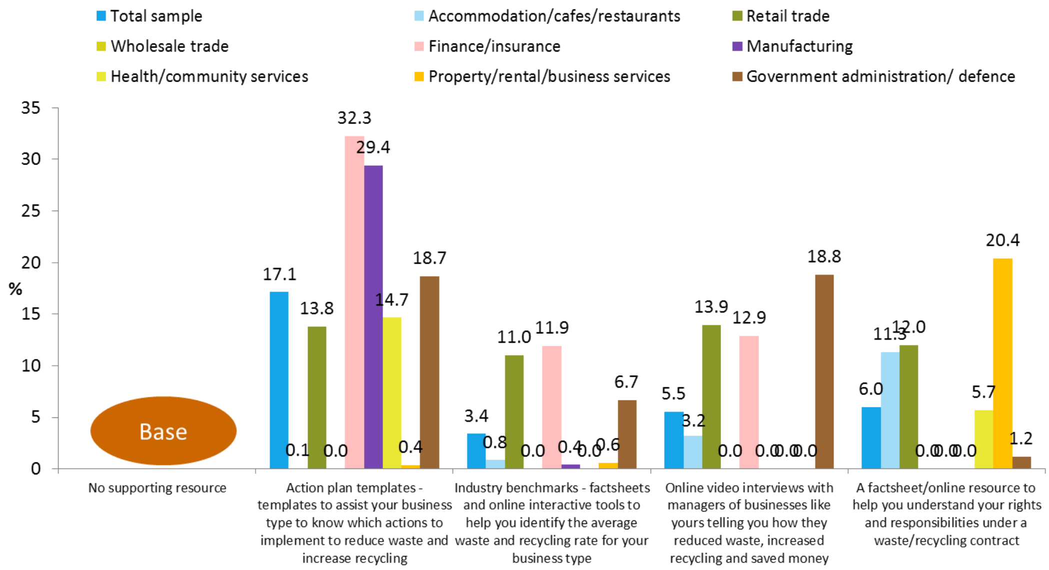
Attribute 4 '*supporting resources*'

The total sample model shows the highest preference for *supporting resources* to be in the form of action plan templates that help their business type know which actions to implement to reduce waste and increase recycling (showing a 17.1% rise in likely participation in a Bin Trim program). Other ideas tested had only limited appeal: a factsheet/online resource to help the understanding of the rights and responsibilities under a waste/recycling contract (6%); online video interviews with managers of businesses like theirs telling them how they reduced waste, increased recycling and saved money (5.5%) and industry benchmarks, factsheets and online interactive tools to help identify the average waste and recycling rate for their business type (3.4%).

The finance/insurance sector SMEs prefer action plan templates (32.3%) as did the manufacturing sector (29.4%). The property/rental and business services sector had a strong preference for a factsheet/online resource to help understand their rights and responsibilities under a waste/recycling contract (20.4% increase in their participation).

Eighteen point eight percent of the government Admin/defence sector responded strongest to online video interviews with managers of businesses as the most appealing support resource.

Figure 35: How does attribute 4: 'supporting resources', affect participation in Bin Trim?



Base: Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).

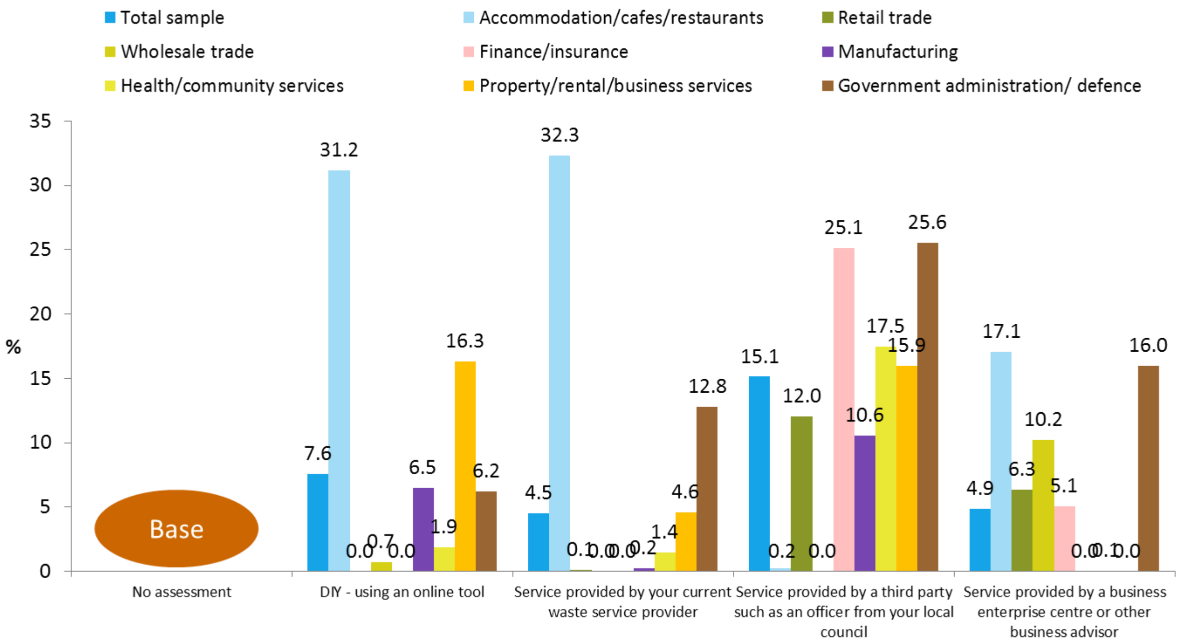
Attribute 1: 'Assess waste and recycling needs & create a tailored action plan'

The total sample model shows the highest preference for a *services to assess waste and recycling needs and create a tailored action plan* being provided by a third party such as the local council (showing a 15.1% rise in likely participation in the Bin Trim program). Other levels of support tested had only limited appeal: DIY – using an online tool (7.6%); service provided by a business enterprise centre or other business advisor (4.9%) and a service provided by their current waste service provider (4.5%).

The accommodation/cafe/restaurant sector SMEs want the waste assessment and action plan to be provided by either their current WSP (32.3%) or through a DIY online tool (31.2%).

The government Admin/defence sector (25.6%) and the property/rental and business services sector (25.1%) want these services to come from a third party such as a local council.

Figure 36: How does attribute 1: 'Assess waste and recycling needs and create a tailored action plan' affect participation?



Base: *Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).*

Attribute 3: 'Implement your action plan – *support to set up a new recycling system'*

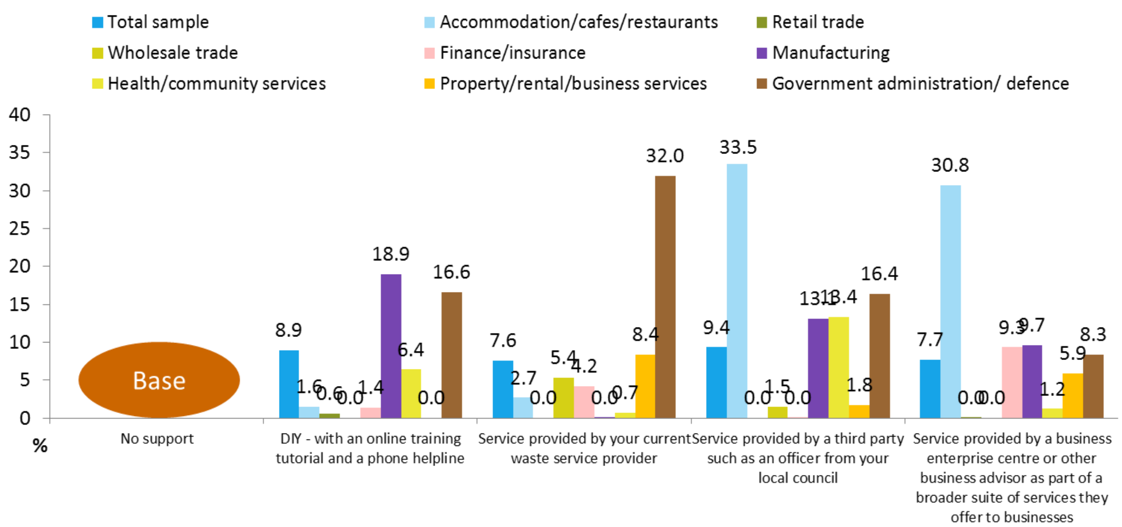
The total sample model shows the highest preference for assistance to *implement the action plan to set up a new recycling system* via a third party such as the local council (showing a 9.4% rise in likely participation in a Bin Trim program). Other ideas tested had less appeal: DIY - with an online training tutorial and a phone helpline to help set up a new recycling system (8.9%); the service provided by a business enterprise centre or other business advisor (7.7%), and such a service provided by their current waste service provider (7.6%).

The accommodation/cafés/restaurants sector showed a higher preference for the local council to help implement a new recycling system (33.5%) and also from a business enterprise (30.8%).

The government Admin/defence sector responded the strongest to help for implementing a new recycling system to come from their current WSP (32%).

The manufacturing sector SMEs prefer support to establish a new recycling system to come via a DIY online training tutorial and a phone helpline (18.9%).

Figure 37: How does attribute 3: 'Implement your action plan' affect engagement?



Base: Total sample (n=603), Accommodation/Cafes/Restaurants (n=81), Retail Trade (n=76), Wholesale Trade (n=76), Finance/Insurance (n=79), Manufacturing (n=76), Health/Community Services (n=77), Property/Rental/Business Services (n=81), Government Administration/Defence (n=57).

13. Appendix A: Telephone Survey

2396 – EPA – Bin Trim Benchmark - SMEs

TELEPHONE SURVEY – 12-15 MINUTES - VERSION 3

Thank you for agreeing to take part in this survey. It should take around 12-15 minutes to complete. This survey has been commissioned by the New South Wales Environment Protection Authority (EPA) to inform the *Waste Less Recycle More* initiative of the New South Wales government.

This survey will assist the NSW EPA to tailor information, advice and resources to help businesses like yours make good decisions about reducing waste and increasing recycling.

All surveys by instinct and reason are conducted under the Australian Market and Social Research Privacy Principles. This ensures confidentiality of your information. The results will be grouped. Your individual answers will not be identified.

You can confirm the authenticity of the survey by contacting the NSW EPA Business Recycling Team on 131 555 or sending an email to bin.trim@epa.nsw.gov.au

CHECK QUOTAS FOR METRO AND REGIONAL NSW AS WELL	Number of firms	Estimated Proportion	Sample required	Small 5-20	Medium 21-199
Accommodation/cafes/restaurants	14563	4.5	75	60	15
Retail trade	25496	7.8	75	60	15
Wholesale trade	18031	5.4	75	60	15
Finance/insurance	34287	10.3	75	60	15
Manufacturing	96456	29.1	75	60	15
Health/community services	26185	7.8	75	60	15
Property/rental/business services	64438	19.4	75	60	15
Government administration/ defence	52637	15.7	75	60	15
Total	332063	100	**600**	480	120

Section Screeners

[RECORD LOCATION]

S0. Finally, Please indicate which best describes where your **organisation's main base of operation is located.**

	S/R
Metropolitan location	O1
Rural location	O2
Remote location	O3
Other, please specify ______________________________	O4

[ASK ALL]

S1. Are you the main decision maker for the business on waste management and recycling? *Please choose one only*

[DO NOT ROTATE – READ OUT]	S/R
Yes	O1
No	O2
Unsure	O3

[ASK IF CODE 2 OR 3; OTHERS GO TO Q2]

S1b. Can you put us in touch with the main decision maker for the business on waste management and recycling? *Please choose one only*

[DO NOT ROTATE – READ OUT]	S/R
Yes	O1
Terminate…………No	O2
Terminate …………..Unsure	O3

[ASK ALL]

S2. How many full time equivalent (FTE) employees does your organisation have? *Please choose one only*

		S/R
	TERMINATE---Up to 5	O1
	6-10	O2
	11-20	O3
	21-49	O4
	50-99	O5
	100-199	O6
EXCLUDE IF MORE THAN 200+ EMPLOYEES	200+	O7

[ASK ALL]

S3. Which sector does your organisation mainly operate in?

Please choose one only

	[READ OUT]	S/R
	Accommodation/cafes/restaurants	O1
	Retail trade	O2
	Wholesale trade	O3
	Finance/insurance	O4
	Manufacturing	O5
	Health/community services	O6
	Property/rental/business services	O7
	Government administration/ defence	O8
TEMINATE	______________________________Other	O12

[ASK IF CODE 1 IN S3]

S3b. Which of the following best describe the business?

Please choose one only

[READ OUT]	S/R
Accommodation	O1
Cafes, restaurants or takeaway food services	O2
Pubs, taverns or bars	O3
Clubs or RSL	O4

[ASK IF CODE 2 IN S3]

S3c. Does your organisation operate in food retailing?

Please choose one only

[DO NOT READ OUT]	S/R
Yes	O1
No	O2

[ASK ALL]

S4. Does your business currently recycle?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Yes	O1
No	O2
Unsure	O3

[ASK IF CODE 1, OTHERS GO TO Q1]

S5. What recycling services and/or equipment do you have in place? *Please choose all that apply*

	M/R
No recycling service in place	O1
Paper	O2
Cardboard	O3
Plastic film/soft plastic	O4
Rigid plastics	O5
Food	O6
Glass	O7
Timber	O8
Mixed containers	O9
Co-mingled recycling	O10
Baler	O11
Compactor	O12
Dehydrator	O13
Composter	O14
Metals	O15
Other ________________________PLS specify	O16

[ASK IF CODE 1, OTHERS GO TO Q1]

S6. Are you satisfied with these services? *Please choose one only*

[DO NOT ROTATE – READ OUT]	S/R
Yes	O1
No	O2

Unsure	○3

Section A - INFORMATION AVAILABILITY, AWARENESS AND KNOWLEDGE

[ASK ALL]

Q1. How informed is your organisation about the information, advice and support that is available to help you better manage waste and control your waste removal and recycling costs?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Very well informed	○4
Fairly well informed	○3
Not that well informed	○2
Not at all well informed	○1
Don't know	○99

[ASK ALL]

Q2. How easy or difficult is it for your organisation to get **tailored advice or support** on how to better manage waste and control your waste removal and recycling costs?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Very easy	○4
Fairly easy	○3
Fairly difficult	○2
Very difficult	○1
Don't know	○99

[ASK IF CODES 3 OR 4 IN Q1; OTHERS GO TO Q4]

Q3. Is that because your organisation has actively sought information/ advice/ support or because you have been made aware of what is available, or both?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Actively sought information/advice/support	○1
Been made aware	○2
Both	○3
[DO NOT READ OUT] Neither	○4

[ASK IF CODES 1 OR 2 IN Q1]

Q4. Is that because your organisation has not actively sought information/ advice/ support or because you have not been made aware of what is available, or both?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Not actively sought information/advice/support	○1
Not been made aware	○2
Both	○3
[Do Not Read Out – Neither]	

[ASK ALL]

Q5. How has your organisation obtained information on managing waste and controlling your waste removal and recycling costs? Through …

Please select all that apply

[ROTATE CODES READ OUT]	M/R
Online sources:	
Waste or recycling company websites	☐1
State or federal government websites (e.g. EPA)	☐2
Information via Facebook, twitter, RSS feeds	☐3
Emails or email alerts	☐4

Electronic newsletters	☐5
Online networking or online forums	☐6
Webinars or online briefings	☐7
Podcasts	☐8
Organisations and people sources:	
Directly from a waste/recycling company from a sales rep, newsletter or brochure	☐9
Non – government organisations (e.g. Planet Ark, Business Recycling website etc.)	☐10
Personal referrals (other businesses, industry colleagues, friends)	☐11
Landlord/building or complex manager	☐12
Local Government (website or brochures)	☐13
Professional bodies or trade associations	☐14
Specialist consultants or advisers	☐15
Other channels the information may have reached you:	
Hardcopy newsletters, newspapers, magazines or journals	☐16
Handbooks or factsheets	☐17
Videos/DVDs	☐18
Telephone helplines	☐19
Radio or TV	☐20
Other (Please specify)	☐97
None of these	☐99

Section B – ADVICE AND SUPPORT

[ASK ALL]

Q8. Which of these sources of advice or support on reducing waste and increasing recycling has your organisation used or are you planning to use? *Please choose one only per row*

	Q8 S/R		
ROTATE CODES A TO L – READ OUT	Used	Not used but planning to use	Not planning to use
a. Workshops and seminars	O1	O2	O3
b. Accredited training courses	O1	O2	O3
c. Online education programs	O1	O2	O3
d. Waste and recycling helplines	O1	O2	O3
e. Business case tools and templates	O1	O2	O3
f. Good practice guides	O1	O2	O3
g. Research and fact sheets	O1	O2	O3
h. Case studies of organisations who have reduced waste and increased recycling	O1	O2	O3
i. Waste and recycling calculators	O1	O2	O3
j. Industry reports on measures that reduce waste and improve recycling rates	O1	O2	O3
k. Business recycling search directories (businessrecycling.com.au	O1	O2	O3
l. Other – (please specify)	O1	O2	O3
m. None of these			

[ASK FOR EACH AWARE AT Q8]

Q9. Thinking about your organisation, which of these sources of advice or support have you used or are you planning to use?

Please choose one only per row

	Q9 S/R		
ROTATE CODES A TO H – READ OUT	Used	Not used but planning to use	Not planning to use
a. My current waste/recycling contractor	O1	O2	O3
b. A new waste/recycling contractor	O1	O2	O3
c. Specialist waste and recycling consultants	O1	O2	O3
d. Mentors who know about waste and recycling in your sector	O1	O2	O3
e. Advisors from your professional body or trade association	O1	O2	O3
f. Advisors that engage and educate staff around waste and recycling behaviours	O1	O2	O3
g. None of these			

[ASK ALL]

Q10. How aware is your organisation about the steps you can take to better manage your waste and recycling?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Very well aware	O4
Fairly aware	O3
Not that aware	O2
Not at all well aware	O1
Don't know	O99

[ASK ALL]

Q11. Do you know how much your organisation pays for waste and recycling per year?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Yes, exactly	O1
Yes, approximately	O2
No	O3

[ASK ALL]

Q12. Do you know what parts of your operation produce the most waste?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Yes, exactly	O1
Yes, approximately	O2
No	O3

Section C - MONITORING WASTE AND RECYCLING

[ASK ALL]

Q13 Does your organisation keep track of the volume of waste it produces?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R	
Yes, daily	O6	Go to Q15a & then Q16a
Yes, monthly	O5	
Yes, quarterly	O4	
Yes, annually	O3	
No, not really	O2	Go to Q17a
No, not at all	O1	

Q14 Does your organisation keep track of how much it recycles?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R	
Yes, daily	O6	Go to Q15b & then Q16b
Yes, monthly	O5	
Yes, quarterly	O4	
Yes, annually	O3	
No, not really	O2	Go to Q17b
No, not at all	O1	

[ASK ALL]

Q16. If your organisation were to invest in waste reduction measures (new recycling system, or a new piece of recycling equipment like a baler), over what period of time would you want the measures to pay for themselves?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R

Would invest if there was a net financial benefit within 10 years	O1
Would invest if there was a net financial benefit within 6-9 years	O2
Would invest if there was a net financial benefit within 4-5 years	O3
Would invest if there was a net financial benefit within 2-3 years	O4
Would need to have a return on investment within 12 months	O5
Would need to have significant savings immediately	O6
Would invest in initiatives for other reasons, not driven by financial return	O7
Other, please specify	O97

Section D – ATTITUDES TO WASTE AND RECYCLING

[ASK ALL]

Q17 To what extent do you agree or disagree with the following statements…

Please choose one only per row

	Strongly disagree	Tend to disagree	No opinion either way	Tend to agree	Strongly agree
a. Being efficient with waste and recycling gives businesses a competitive edge	O1	O2	O3	O4	O5
b. Reducing waste and increasing recycling is part of our being a sustainable and ethical business	O1	O2	O3	O4	O5
c. Being able to tell clients/customers that we recycle as much as possible helps us win or retain business	O1	O2	O3	O4	O5
d. Your organisation has already done everything it can to minimise waste and maximise recycling	O1	O2	O3	O4	O5
e. The waste bill for your organisation is a small percentage of total operating costs	O1	O2	O3	O4	O5
f. The recycling bill for your organisation is a small percentage of total operating costs	O1	O2	O3	O4	O5
g. We don't know how to reduce waste or improve recycling but would be interested if help were available	O1	O2	O3	O4	O5
h. I've received advice and the organisation can't afford the initial	O1	O2	O3	O4	O5

expense to improve our waste and recycling service					
i. I haven't received advice, but I doubt that the organisation can afford the initial expense to improve our waste and recycling service	O1	O2	O3	O4	O5
j. Reducing waste and improving recycling is a big motivator for our staff	O1	O2	O3	O4	O5
k. We don't have space to fit the extra bins needed to reduce waste and recycle effectively	O1	O2	O3	O4	O5

Section E – ACTION

[ASK ALL]

Q18. Has your organisation had a waste and recycling audit or assessment completed?

Please choose one only

[DO NOT ROTATE]	S/R
Yes, within the past 12 months	O4
Yes, more than 12 months ago	O3
No, but will be having an assessment in the next 12 months	O2
No, and not planning to have an assessment in the next 12 months	O1
Don't know	O99

[ASK ALL]

Q19. Has your organisation developed a waste and recycling action plan or was one developed for you?

Please choose one only

[DO NOT ROTATE]	S/R	
Yes	O1	Go to Q22
No	O2	Go to Q23
Don't know	O99	

[ASK IF YES ….. IE CODE 1 IN Q19; OTHERS GO TO Q21]

Q20. Has your organisation implemented its waste and recycling action plan?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Yes, fully	O3
Yes, partially	O2
No, not started implementing yet	O1
Don't know	O99

[ASK ALL]

Q21. Which of these has your organisation done or are you planning to do?

Please select all that apply per row

[ROTATE CODES A to D – READ OUT]	Did this more than 12 months ago	Did this within the past 12 months	Planning to do this in the next 12 months	Not applicable
a. Introduce a waste and recycling management policy	O1	O2	O3	O4
b. Review our waste and recycling management policy	O1	O2	O3	O4
c. Discuss better waste management and recycling at board or management team level	O1	O2	O3	O4
d. Discuss better ways to deal with waste and recycling with all staff	O1	O2	O3	O4
e. Start a new recycling collection service	O1	O2	O3	O4
f. Install recycling equipment (e.g. recycling bins, balers, compactors, dehydrators) to increase recycling	O1	O2	O3	O4

[ASK ALL]

Q22. What, if anything, is **stopping you making changes** in your organisation to reduce waste and increase recycling?

Please select all that apply for your organisation

[READ OUT]	M/R
Not sure what to do	☐1
Lack of time/staff resource	☐2
Lack of management commitment	☐3
financial reasons	☐4
No demand from clients/customers	☐5
No obvious benefits	☐6
Risks involved (e.g. interfering with product/service quality)	☐7
Lack of information/advice relevant to your organisation	☐8
May make our business uncompetitive	☐9
Don’t own our premises/landlord won’t make changes	☐10
Not enough space to have the necessary bins	☐11
Not frequent enough pick ups	☐12
Lack of recycling services available to this business or in this area	☐13
Costs of recycling equipment	☐14
Other factor/s stopping us (Please Specify)	☐97
None of these/nothing stopping us	☐99

[ASK ALL]

Q23 Would financial assistance encourage you to install recycling equipment (Prompt if needed e.g. baler, compost unit, compactor, and dehydrator)?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Yes, definitely	O3
Yes, possibly	O2
No	O1
Don't know	O99

[ASK IF CODES 3 OR 2 IN Q23; OTHERS GO TO Z1]

Q24. Which materials would you then recycle?

Please select all that apply

[READ OUT]	M/R
Cardboard	☐1
Plastic film	☐2
Rigid plastics	☐3
Food	☐4
Glass	☐5
Timber	☐6
Expanded polystyrene (EPS)	☐7
Other ________________Please Specify	☐97

Section F – Choice experiment

We have another, very important part of the study.

We will now tell you four different scenarios that the NSW EPA could provide to businesses to support them to reduce waste and recycle more in the future.

We want to know if you would use these services or resources if the NSW EPA offered them. This will take a just few minutes.

Remember each scenario may look alike, but each is actually different. All you need to do, is review whether the scenario would lead you to use the service or resource, and tell us your choices.

You may see some terms used that you are not familiar with. To help you, we will tell you some **definitions** before starting these four different scenarios.

[INTERVIEWER: DESCRIBE FOUR DIFFERENT SCENARIOS TO RESPONDENT]

VERSION: _____

Section Z - Demographics

[ASK ALL]

Z1 Have you seen, read or heard about the NSW EPA Bin Trim program? *Please choose one only*

[DO NOT ROTATE – READ OUT]	S/R
Yes, definitely	O3
Yes, possibly	O2
No	O1
Don't know	O99

[ASK IF CODE 2 OR 3 in Z1; OTHERS GO TO Z3]

Z2 have you received a free Bin Trim assessment? *Please choose one only*

[ASK IF CODE 2 OR 3 in Z2; OTHERS GO TO Z4]

Z3. Would you recommend a Bin Trim assessment to other businesses?

	Z2	Z3
[DO NOT ROTATE – READ OUT]	S/R	S/R
Yes, definitely	O3	O3
Yes, possibly	O2	O2
No	O1	O1
Don't know	O99	O99

[ASK IF CODE 1 OR 99 in Z2; OTHERS GO TO Z4]

Z3b. Why wouldn't you recommend it to other businesses?

[ASK ALL]

Z4. We would like to show you some advertisements. Can we email them to you?

Please choose one only

[DO NOT ROTATE – READ OUT]	S/R
Yes	O1
No	O2

[ASK IF YES IN Z4]

Z4b. Can you give us your email address?

Email address

Confirm email address

[EMAIL ADVERTISMENTS FOR Q25]

[ASK ALL]

Z5. Please indicate where your organisation's main base of operation is located.

	Z4	Z5
	S/R	S/R
Sydney	O1	O1
Newcastle	O2	O2
Wollongong	O3	O3
North Coast	O4	O4
South Coast	O5	O5
North-western NSW	O6	O6
Western NSW	O7	O7
South-Western NSW	O8	O8
Other, please specify ______________________	O9	O9

[ASK ALL]

Z6. Recode gender:

[DO NOT READ OUT]	S/R
Male	O1
Female	O2

[ASK ALL]

Z7. Which of the following age groups do you belong to?

	S/R
18-24	O1
25-34	O2
35-44	O3
45-54	O4
55-64	O5
65+	O6

[ASK ALL]

Z8. Which of the following best describes your position/ role at your business?

	S/R
Owner	O1
Director/ Partner	O2
CEO	O3
Manager	O4
Other, please specify	O5
[DO NOT READ OUT] Refused	O6

Thank you very much for your time today.

Section G – Prompted advertising recall

[ASK IF YES IN Z4]

Q25. Below are some advertisements you might have seen previously. Please tell me if you have ever seen them.

	READ OUT AND ROTATE	Yes	No	Not sure
B Newspapers	 	O1	O2	O3
B Magazines	 	O1	O2	O3
C Online	 	O1	O2	O3
D Radio	Want to save on waste? Join 20,000 businesses recycling 13 per cent more with the NSW Government's Bin Trim program.	O1	O2	O3

	You'll get free advice and support to help your business waste less and recycle more. Find out more at: epa.nsw.gov.au slash bintrim			

[ASK IF YES IN Z4]

Q26. What is the main message these advertisements are trying to get across to you?