Social Research on Small to Medium Enterprises (SME) Waste and Recycling

Summary Benchmark Study

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Environment Protection Authority

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1. Executive Summary

This report is based on the research findings of Instinct and Reason as outlined in the unpublished report *Bin Trim Social Research for Benchmarking and Program Evaluation.* It benchmarks the current small and medium sized enterprise (SME) culture around waste management, resource recovery and recycling and provides an insight into the relationship between SMEs and their waste service providers.

Nearly all SMEs claim to be currently engaged in recycling activities of some form, and this widespread claim is consistent across all industry sectors covered in the research program.

One of the most strongly held SME views is the link they make between reducing waste and increasing recycling, and their desire to be a sustainable and ethical business (41% strongly agree and 35% agree).

However, most SMEs firmly believe they have done all they can to minimise waste and maximise recycling (35% strongly agree and 33% agree). This limits contemplation of further action and reduces their likelihood of tuning in to ‘new news’ about waste reduction and enhanced recycling opportunities. Furthermore, similar majorities of SMEs state their waste (71% either strongly agree or agree) and recycling bills (69% either strongly agree or agree) are a relatively small cost of their business. This set of attitudes inhibits active information searches and also the passive receipt of information and knowledge.

The motivators for further action in waste reduction and enhanced recycling come from a desire for a competitive edge (53% agree), its role in motivating staff (51% agree) and in being able to promote that they recycle and minimise waste to their own customers (40% agree).

The major attitudinal barriers to further action on waste and recycling improvements included the fact that costs were relatively low for both the waste bill (36% strongly agree and 35% tend to agree) and the recycling bill (38% strongly agree and 31% tend to agree), the belief that all that could be done had been done (35% strongly agree and 33% tend to agree), and the perceived lack of space to keep the bins needed to recycle effectively (18% strongly agree and 19% tend to agree).

The great majority of SMEs report being satisfied with their recycling services (86%). Given that the wider evidence suggests that SMEs are only recycling limited types of waste, this result is concerning.

Overall, only one third of the SMEs interviewed believed they were very well informed about the information, assistance and support that is available to help them manage waste and to control their waste removal and recycling costs. About the same amount (32%) believe it is very easy for them to get access to tailored advice or support to help them better manage waste and to control their waste removal and recycling costs. The remainder do not. Most SMEs seek information directly from waste service providers by either visiting their website (48%) or contacting the waste service provider directly (48%). Local government is seen to play a very useful role as well with 39% of SMEs reporting they had received information from this source.

An SME segmentation map of attitudes and behaviours towards waste minimisation and recycling groups SMEs by their ‘mindsets’. SME ‘mindsets’ identified through the segmentation include:

- **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. 22% of SMEs surveyed fall within this category.

- **Spectators** are keen to invest in waste reduction measures yet haven't undertaken an assessment. 19% of SMEs surveyed fall within this category.
- **Doubters** have undertaken an assessment of their waste and recycling yet are reluctant to invest in waste reduction measures. 13% of SMEs surveyed fall within this category.
- **Disengaged** SMEs have not conducted an assessment and have no desire to invest in waste reduction measures. 46% of SMEs surveyed appear to be disengaged.

To improve SME performance in waste minimisation and recycling this study has detailed some key recommendations in Section 6 including:

1) Actively promote 'reducing waste and recycling more' to SMEs
2) Use reinforcement strategies for SMEs that are on the right path. Provide strong follow-up support to SMEs to reinforce good behavior
3) Disrupt the SME's view that they are recycling all they can and they can't do any more
4) Key messages should be used when approaching SMEs about reducing waste and improving recycling outcomes
5) Use strategies that facilitate change.

Bin Trim assessments appear to be working well and driving considerable behaviour change in SMEs. The key impacts of the Bin Trim assessment appear to be threefold. Firstly SMEs are much more likely to have an action plan in place. Secondly management is more likely to be focusing on the issue with reviews of their waste and recycling policies. Finally they are likely to be on the lookout for new (presumably better) waste and recycling systems. In a related study, 93% of the surveyed Bin Trim SMEs said they had implemented all or some of their action plan recommendations; 83% said their recycling had already increased and nearly 63% said they will save money as a result of the Bin Trim program (NSW EPA, 2015 Unpublished).

However, as knowledge increases about waste and recycling through participation in programs such as Bin Trim, the barriers to taking the next steps become clearer to SMEs. Future government assistance is still likely to be of value in overcoming these barriers.

2. Background

The NSW Environment Protection Authority (EPA) is responsible for raising awareness of regulatory requirements, delivering strong compliance and enforcement programs, and driving improved waste and recycling practices.

Waste Less, Recycle More is a five-year $465.7 million waste and recycling initiative for New South Wales that will deliver economic, employment and environmental benefits for local communities and will transform waste and recycling.

Under the *Waste Less, Recycle More* initiative the EPA is delivering the Business Recycling Program to improve small and medium enterprises' (SMEs) waste and recycling culture and behaviour. The Business Recycling Program, including the Bin Trim business grants, Bin Trim recycling equipment rebates and *Circulate*, NSW EPA Industrial Ecology program all focus on the issue of waste and recycling among SMEs.

The EPA engaged Instinct and Reason to conduct social research with SMEs regarding their knowledge, attitudes and behaviour in relation to waste and recycling. The research benchmarks the current SME culture around waste management, resource recovery and recycling. While SMEs were the focus of the research, it also provides an insight into the relationship between SMEs and their waste service providers.

This report is based on the research findings of Instinct and Reason as outlined in the unpublished report *Bin Trim Social Research for Benchmarking and Program Evaluation.*

This research will help inform the delivery of communications and education programs under the *Waste Less, Recycle More* initiative. This research will also help measure the effectiveness of the Business Recycling Program through follow-up tracking surveys.

2.1 Aims of the Business Recycling Program

The Business Recycling Program aims to:

1. support businesses to reduce waste and increase recycling
2. provide SMEs in New South Wales with low-cost access to new and upgraded small-scale infrastructure to increase resource recovery
3. create opportunities for medium and large businesses to re-use or recover waste through the introduction of a NSW Industrial Ecology Business Support Network
4. work cooperatively with the Australian Packaging Covenant (APC) by co-funding appropriate infrastructure for the recycling of packaging waste
5. continue to fund programs to make it easy for businesses to locate recyclers
6. continue to fund training programs to support industry and develop markets for recycled materials.

2.2 Bin Trim business grants

The $11.1-million Bin Trim program is funding organisations with waste expertise to engage with 20,000 small and medium enterprises to help them reduce waste and increase recycling. The Bin Trim Business program helps businesses measure their waste and provides tailored advice and assistance on how to reduce, re-use and recycle materials.

In Round 1, funding was made available for grants between $50,000 and $250,000 for successful applicants to provide free Bin Trim assessments to participating businesses and to identify opportunities to recycle more. A total of 43 applications were received, of which 27 were successful in obtaining $4,76 million in grant funding.

Bin Trim grantees began implementing their projects in July 2014 by recruiting businesses and conducting assessments of their waste and recycling bins. Grantees developed tailored action plans and helped to implement these to reduce waste and increase or improve recycling. Second (follow-up) assessments were completed by May 2015.

Round 2 of the Bin Trim grants program commenced in September 2015 with projects to be completed by March 2017. $6.87 million was allocated to 26 grantees who will engage with SMEs across the state through the Bin Trim program.

2.3 Bin Trim recycling equipment rebates

The Bin Trim Rebate program provides rebates of between $1,000 and $50,000 to help businesses with the cost of recycling equipment. The EPA will fund up to 50% of the total cost of the equipment. Only businesses assessed under an approved EPA program or other on application, are eligible to apply. The rebate program opened in October 2014 and will continue until June 2017.

2.4 Circulate, NSW EPA Industrial Ecology program

Through facilitators, the EPA is fostering the development of Industrial Ecology projects and networks on a regional basis across New South Wales. The projects are formed by groups of businesses – medium to large enterprises – who elect to work together to develop commercial applications for the re-use of waste items currently being sent to landfill, including food, paper and cardboard, timber and plastics.

Businesses can participate in one of two ways, by:

- becoming an Industrial Ecology facilitator, and supporting the establishment of Industrial Ecology projects and networks for their nominated region
- joining a regional Industrial Ecology network as a participating business.

Over four years to 2017, the Circulate, NSW EPA Industrial Ecology program is seeking to engage with 1000 medium to large enterprises to establish approximately 100 Industrial Ecology projects across New South Wales. During this period the program is targeting 160,000 tonnes of landfill diversion from participating businesses.

3. Research objectives

Benchmark SME knowledge, attitudes and behaviour towards recycling

- Develop indicators to measure the current knowledge, attitudes and behaviour of SMEs in regard to the topic of recycling, including uptake of recycling services and how and why these decisions are made.

Establish a baseline for future qualitative evaluation and benchmarking.

- Benchmark knowledge, attitudes and behaviour of waste service provider contractors and the waste industry towards SME recycling.

Develop indicators to measure the current knowledge, attitudes and behaviour of waste service provider contractors towards assisting SMEs to recycle more

- Establish a baseline for future qualitative evaluation and benchmarking.

Benchmark recycling services offered to SMEs and all businesses

- Establish a baseline of waste and recycling services currently offered to SMEs by existing waste and recycling services for the purposes of future evaluation and benchmarking.

4. Research notes

Weighting

Data from the survey of SMEs has been weighted to reflect the actual population of businesses in each industry sector based on Australian Bureau of Statistics (ABS) data.

Rounding

Results are provided as a percentage to the nearest whole number. In some figures and tables, this may result in totals adding up to slightly more or less than 100%.

Significant differences

Significance testing has been applied to the results and statistically significant differences (at a 95% confidence interval) are indicated through the report.

5. Summary of findings

- Nearly all SMEs claim to be currently engaged in recycling activities of some form, and this widespread claim is consistent across all industry sectors covered in the research program.
- One of the most strongly held SME views is the link they make between reducing waste and increasing the amount of product they recycle, and their desire to be a sustainable and ethical business (41% strongly agree and 35% agree).
- However, most SMEs firmly believe they have done all they can to minimise waste and maximise recycling (35% strongly agree and 33% agree). This limits contemplation of further action and reduces their likelihood of tuning in to ‘new news’ about waste reduction and enhanced recycling opportunities.
- Furthermore, similar majorities of SMEs state their waste (71% either strongly agree or agree) and recycling bills (69% either strongly agree or agree) are a relatively small cost of their business.
- This set of attitudes inhibits active information searches and also the passive receipt of information and knowledge.
- The motivators for further action in waste reduction and enhanced recycling come from a desire for a competitive edge (53% agree), its role in motivating staff (51% agree) and in being able to promote that they recycle and minimise waste to their own customers (40% agree).
- The major attitudinal barriers to further action on waste and recycling improvements included the fact that costs were relatively low for both the waste bill (36% strongly agree and 35% tend to agree) and the recycling bill (38% strongly agree and 31% tend to agree), the belief that all that could be done had been done (35% strongly agree and 33% tend to agree), and the perceived lack of space to keep the bins needed to recycle effectively (18% strongly agree and 19% tend to agree).

- The great majority of SMEs report being satisfied with their recycling services (86%).
- Overall, only one third of the SMEs interviewed believed they were very well informed about the information, assistance and support that is available to help them manage waste and to control their waste removal and recycling costs.
- About the same amount (32%) believe it is very easy for them to get access to tailored advice or support to help them better manage waste and to control their waste removal and recycling costs. The remainder do not.
- Most SMEs seek information directly from waste service providers by either visiting their website (48%) or contacting the waste service provider directly (48%). Local government is seen to play a very useful role as well with 39% of SMEs reporting they had received information from this source.
- Bin Trim assessments appear to be working well and driving considerable behavior change in SMEs.

6. Key recommendations

Actively promote 'reducing waste and recycling more' to SMEs

SMEs are not searching for information at this point. SMEs will need to be actively approached or 'door knocked'.

Use reinforcement strategies for SMEs that are on the right path

Reinforce the good behaviour in those on the right path to reduced waste and improved recycling. Some SMEs are already disciples of change and need reinforcing messages that their behaviours are on the right track – here is what else you can do.

Provide strong follow-up support to businesses to reinforce the good behaviour

After a waste assessment and advice to a business, they often become more aware of the gaps in their knowledge. They see the barriers to further change more clearly and they are more likely to say that financial assistance could help them. These businesses rely on good follow-up support to overcome their individual challenges to improved waste and recycling.

Disrupt the SME's view that they are recycling all they can and they can't do any more

Key messages should be used when approaching SMEs about reducing waste and improving recycling outcomes

- 'SMEs are doing well but they could do more'. Size the SME waste problem for them - demonstrate they are part of the 1.8 million tonnes of business waste going to landfill each year. Acknowledge their good work in recycling the basics.
- 'A good business (or an ethical and sustainable business) reduces waste and recycles more'.
- 'Staff get motivated by working for an ethical and sustainable business' or,
'Staff are motivated by reducing their waste and improving their recycling.'
- 'Reducing waste and improving recycling will enhance your profile among competitors and customers.'

Use strategies that facilitate changes

Most SMEs need support to facilitate the changes that will improve recycling. These SMEs have positive attitudes and say they are engaged in at least some positive recycling behaviour. However, these SMEs may be holding back on change and this suggests a facilitation strategy – making it as easy as possible for SMEs to make the necessary changes to their operations.

7. Sample and methodology

7.1 Methodology for the surveys

The benchmark study commenced with a review of related literature and research to uncover a wide range of potential benchmarking questions.

Rapid appraisal interviews

The benchmarking questions were then tested with a small number of SMEs through a rapid appraisal interview process. The rapid appraisal stage was designed to assist in the survey design; in particular to ensure questions were asked that could be answered by waste service providers (WSPs) and SMEs and that reflected real-world interactions. The interviews were used to make assessments of what questions could realistically, easily and accurately be answered by WSPs and SMEs about their waste and recycling activities. The researchers found that WSPs were suspicious of the research and were reluctant to participate in the interviews. A letter from the EPA authenticating the study still appeared to be insufficient with many still suspicious and declining to participate. The rapid appraisal interviews were not designed to provide 'data' in their own right but were critical in ensuring the interview questions were relevant and engaging. As a result uptake of the survey was high and terminations almost nil.

Survey of 639 SMEs

The benchmarking survey was well-received by SMEs and appeared to be a relatively easy survey for SMEs to complete.

- 639 interviews were conducted across New South Wales with SME owners or managers responsible for waste management.
- All 639 SMEs were recruited over the phone.
- 455 of the SME sample completed the interview by computer-assisted telephone interviewing (CATI) and 184 of the SMEs completed the interview through an online survey (SurveyMonkey).
- Data collection followed a pilot test of the survey instrument to ensure all questions were clearly understood by the SME respondent. Once issues were ironed out from the pilot test, the main sample was collected. With the assistance of the rapid appraisal interviews and the literature review the survey did not require any changes between the pilot and the final survey.
- Researchers ensured interviews were conducted with the best respondent of the business and at their most preferred time.
- The sample was obtained using a sourced list of NSW businesses that made use of:
    - Dun and Bradstreet's Company 360 business listing, which allows for business lookups based on industry, company size, location

- Yellow Pages lookups, targeting specific industries
- other online sources (TrueLocal, business websites, vicdir)
- publications, such as *BRW*, which publish lists of businesses on a regular basis.

- Only SMEs with 6–199 full-time equivalent employees were included within the survey sample.
- The researchers requested to speak with the main decision-maker for the business on waste management and recycling.
- Quotas were placed on industry, and company size to ensure the sample covered a representative mix of SMEs.
- The survey with the 639 SMEs was completed relatively easily and in only a few days. It would appear that because the survey was identified at the onset as being for the EPA, and that it was not a formal audit, most SMEs responded very positively to being asked their opinions and about their current waste and recycling behaviours.

7.2 Profile of the SME sample

Table 1: Profile of the SME sample

Main base of operation	**N=**	**%**
Total sample	639	100
Sydney	375	59
Newcastle	51	8
Wollongong	32	5
North Coast	57	9
South Coast	19	3
North-western NSW	25	4
Western NSW	47	7
South-western NSW	28	4
Other	5	1
Main sector of operation	N=	%
Total sample	639	100
Accommodation/cafés/restaurants	81	13
Retail trade	75	12
Wholesale trade	78	12
Finance/insurance	78	12
Manufacturing	78	12
Health/community services	78	12
Property/rental/business services	89	14
Government administration/defence	82	13

Main base of organisation	N=	%
Total sample	639	100
Metropolitan location	407	64
Rural location	224	35
Remote location	8	1

No. full-time employees	N=	%
Total sample	639	100
6 to 10	324	51
11 to 20	101	16
21 to 49	79	12
50 to 99	64	10
100 to 199	71	11

7.3 Survey of waste service providers

A telephone survey of 50 WSPs was undertaken to measure WSP knowledge, attitudes and behaviours relating to the provision of SME waste and recycling services. This survey was more difficult to complete and required the setting up of appointments and ensuring the right person was interviewed. Nevertheless, while needing more time to complete, the response rate to the survey was high. This summary document does not refer to the results of the WSP survey in detail, however, findings have been included where relevant.

7.4 Profile of the WSP sample

Table 2: Profile of the WSP sample

Main base of operation	**N=**	**%**
Total sample	50	100
Sydney	28	56
Newcastle	7	14
Wollongong	2	4
North Coast	5	10
South Coast	1	2
North-western NSW	2	4
Western NSW	3	6
South-western NSW	2	4

Where else do you operate? (More than one response permitted)	**N=**	**%**
Total sample	50	100
Sydney	3	6
Nowhere else	38	76
Newcastle	3	6
Wollongong	6	12
North Coast	5	10
South Coast	4	8
North-western NSW	4	8
Western NSW	4	8
South-western NSW	4	8
Other	7	14

	Waste/recycling collection services currently provided		**Planning on providing this service**	
	N=	**%**	**N=**	**%**
Total sample	50	100	50	100
Mixed waste collection to landfill service	32	64	-	-
Mixed waste collection to treatment service (e.g. Alternative Waste Treatment or Advanced Waste Treatment)	10	20	3	6
Paper recycling	21	42	-	-

	Waste/recycling collection services currently provided		Planning on providing this service	
Cardboard recycling	25	50	1	2
Rigid plastics (plastic bottles and containers)	12	24	1	2
Soft plastics (plastic wrap or film)	10	20	1	2
Glass bottles and jars	13	26	-	-
Food	9	18	1	2
Timber	26	52	1	2
Garden organics	15	30	-	-
Metals	30	60	1	2
Commingled or mixed recyclables	17	34	-	-
Other	24	48	6	12
No others/No	-	-	40	80

7.5 Waste services website audit

An audit of 100 WSP websites was undertaken to identify waste and recycling services, support and systems offered to SMEs. After looking at 10 sites in detail a series of waste and recycling related keywords and services were reviewed on 100 WSP websites.

8. Summary analysis of SMEs by industry sector

With a sample size of about 75 SMEs in each industry sector the margin of error would be +/-11.32% (worst case in a 50/50 yes/no response question). This is based on the 95% confidence interval: in 95 out of 100 surveys, we would expect the result to be within this range, so we can be 95% confident the 'true' result lies within this range.

Therefore the sector analysis needs very significant differences to be statistically valid. The following statistically significant results were found:

Table 3: Summary of SME sectors

Sector	Statistically significant differences to the average
Accommodation/cafés/ restaurants	• More likely to say they are recycling plastic film, glass and food
Retail trade	• More likely to say they are recycling cardboard • Less likely to say they are recycling glass and to have a composter

Sector	Statistically significant differences to the average
Wholesale trade	• Less likely to have obtained information on managing waste and controlling waste removal and recycling costs from state and Federal government websites • Less likely to track food waste recycling • Less likely to agree that being efficient with waste and recycling gives a competitive edge • Less likely to say they are recycling paper, rigid plastics, mixed containers and co-mingled waste
Finance/insurance	• Less likely to have obtained information on managing waste and controlling waste removal and recycling costs from WSP websites and from personal referrals • More likely to track paper recycling and to recycle paper • Less likely to say they are recycling cardboard, metals and food
Manufacturing	• More likely to have obtained information on managing waste and controlling waste removal and recycling costs from WSP websites but least likely from local government and less likely from non-government organisation (NGO) websites • Less likely to track paper recycling and to recycle glass • More likely to say they recycle metals and timber
Health/community services	• Less likely to track wood and hard plastic recycling • More likely to say they recycle paper and less likely to recycle timber
Property/rental/ business services	• More likely to have obtained information on managing waste and controlling waste removal and recycling costs from local government • More likely to track paper, plastic film, wood and glass recycling • More likely to say they recycle paper, cardboard, glass and rigid plastics
Government/administration/ defence	• More likely to have obtained information on managing waste and controlling waste removal and recycling costs from state or Federal government websites, from NGO websites, professional bodies and trade associations and specialist consultants and advisers • More likely to agree that being efficient with waste and recycling gives a competitive edge and that it is a big motivator for staff • More likely to say they recycle cardboard and co-mingled waste

9. Detailed findings

9.1 SME attitudes towards waste and recycling

One of the most strongly held SME views is the link they make between reducing waste and increasing the amount of product they recycle, and their desire to be a sustainable and ethical business (41% strongly agree and 35% agree).

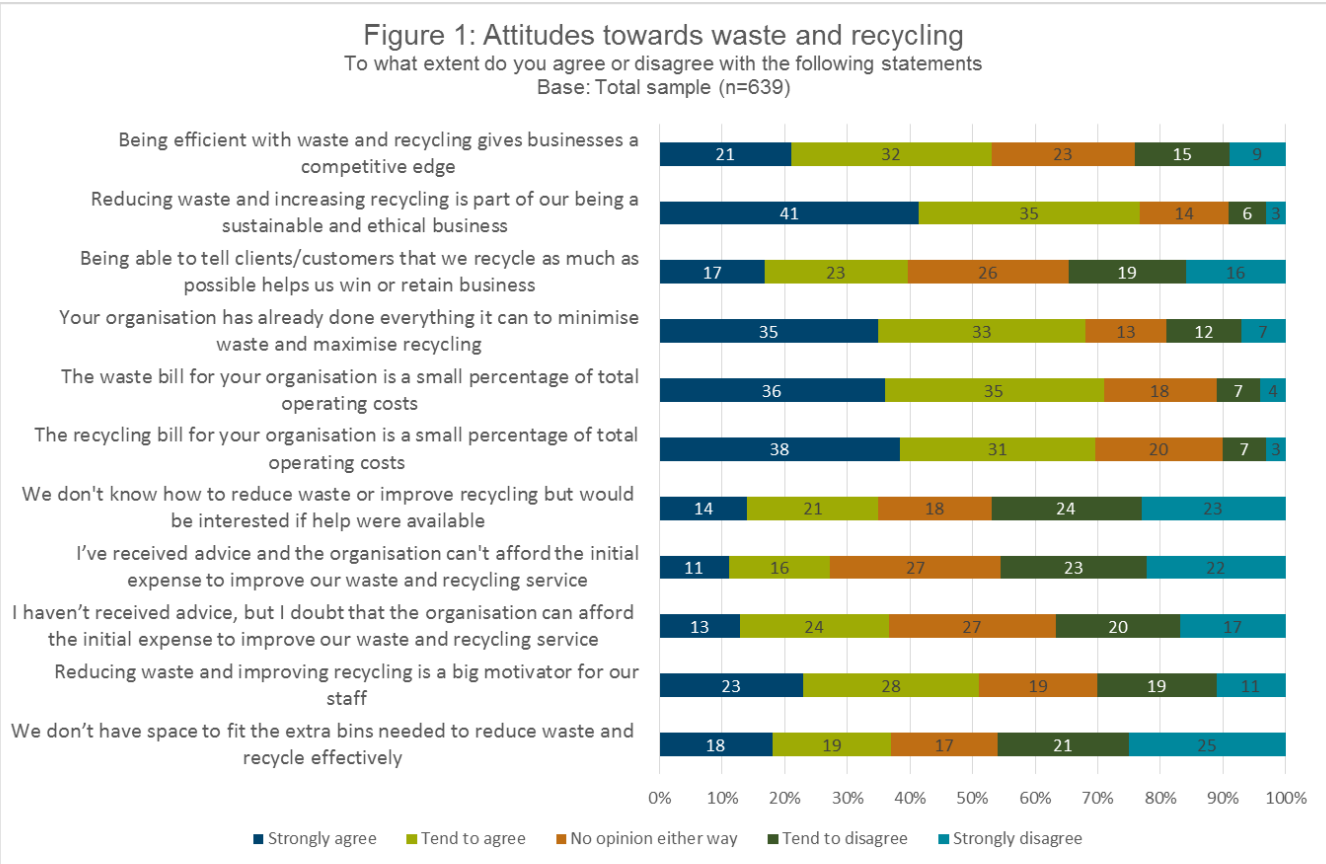
However, most SMEs firmly believe they have done all they can to minimise waste and maximise recycling (35% strongly agree and 33% agree). This limits contemplation of further action and also reduces their likelihood of tuning into ‘new news’ about waste reduction and enhanced recycling opportunities. Furthermore, similar majorities also state their waste and recycling bills are a relatively small cost of their business (71% and 69% respectively either very strongly agree or agree).

This set of attitudes inhibit active and passive information search. The motivation for further action in the area of waste reduction and enhanced recycling comes from a desire for a competitive edge (53% agree), in motivating staff (51% agree), and in being able to promote recycling and waste minimisation to their own customers (40% agree).

About one-third of SMEs recognise they don’t have the knowledge to proceed. This group is likely to be more open to ‘new news’ about reducing waste and optimising recycling opportunities.

Figure 1 shows the major attitudinal barriers to further action including the fact that costs are relatively low for both the waste bill (36% strongly agree and 35% tend to agree) and the recycling bill (38% strongly agree and 31% tend to agree), the belief that all that could be done had been done (35% strongly agree and 33% tend to agree), and the perceived lack of space to keep the bins needed to recycle effectively (18% strongly agree and 19% tend to agree).

Figure 1: SME attitudes towards waste and recycling



Sector analysis

As well as being one of the most strongly held SME views, it was also quite a consistently held view that reducing waste and increasing the amount of product recycled links to their desire to be a sustainable and ethical business. Government administration held this view most strongly (12% over the average). Also highly consistent across the sectors was the view that they have done everything they can to minimise waste and maximise recycling.

Furthermore, similar consistency was also found across all sectors regarding the opinion that the waste and recycling bills are a relatively small cost of business. With the costs of waste management and recycling perceived to be low it is likely this contributes to the relatively high levels of satisfaction with the status quo. The motivators for further action in the area of waste reduction and enhanced recycling comes from a desire for a competitive edge (also consistent across sectors except for wholesale trade which was 11% below the SME average), in motivating staff (government/administration/defence sector, 12% above the SME average) and in being able to promote recycling and waste minimisation to their own customers (of more value to the accommodation/café/restaurant sector and property/rental/business services sector which are both 7% above the SME average).

Table 4 shows that one key attitudinal barrier to further action was the lack of space to keep the bins needed to recycle effectively (key for the health and community services sector which rated this 8% above the SME average) and also the doubt that SMEs were able to commit to investing in this area (as evidenced by agreement with the statement that, ‘despite not having received advice the respondent doubted whether they could afford the initial expense to improve waste and recycling’. This was mentioned as a barrier more frequently by the wholesale trade sector at 7% above the SME average).

Table 4: Attitudes towards waste and recycling – sector analysis – nett agree (Strongly agree + Tend to agree)

Q17. To what extent do you agree or disagree with the following statements:									
Base: Total sample (n=639)									
	Total	**Accom./cafés /restaurants**	**Retail trade**	**Wholesale trade**	**Finance/ insurance**	**Manufacturing**	**Health/ comm. services**	**Property/ rental/bus. services**	**Gov. admin./ defence**
N=	**639**	**81**	**75**	**78**	**78**	**78**	**78**	**89**	**82**
Statement	**%**	**%**	**%**	**%**	**%**	**%**	**%**	**%**	**%**
Being efficient with waste and recycling gives businesses a competitive edge	53	58	53	42	53	49	50	52	65
Reducing waste and increasing recycling is part of our being a sustainable and ethical business	77	75	72	82	71	73	72	82	84
Being able to tell clients/customers that we recycle as much as possible helps us win or retain business	40	47	39	40	37	37	31	47	39
Your organisation has already done everything it can to minimise waste and maximise recycling	68	69	67	64	67	68	68	72	67

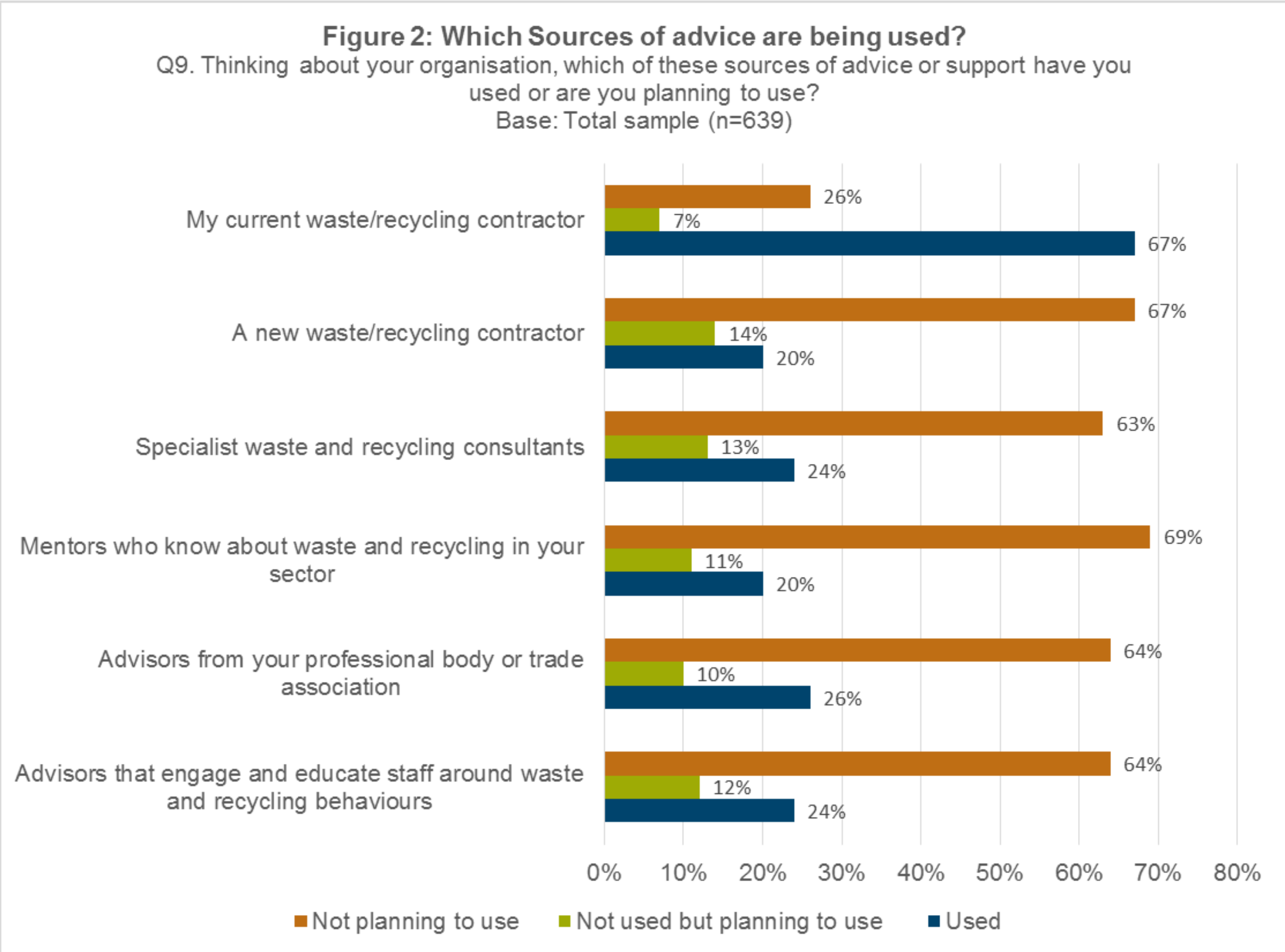
The waste bill for your organisation is a small percentage of total operating costs	71	64	69	78	72	68	64	76	73
The recycling bill for your organisation is a small percentage of total operating costs	69	64	68	76	67	71	65	74	66
We don't know how to reduce waste or improve recycling but would be interested if help were available	35	37	35	40	24	37	38	34	37
I’ve received advice and the organisation can't afford the initial expense to improve our waste and recycling service	28	33	31	24	19	29	26	30	26
I haven’t received advice, but I doubt that the organisation can afford the initial expense to improve our waste and recycling service	37	40	33	44	35	37	33	43	29
Reducing waste and improving recycling is a big motivator for our staff	51	49	53	44	46	47	47	51	63

We don’t have space to fit the extra bins needed to reduce waste and recycle effectively	37	37	37	33	26	42	45	35	35

9.2 Sources of advice and support for SMEs

For SMEs the current waste service provider is the dominant source of advice and support with 67% of SMEs reporting they have used them already for advice – see Figure 2. A few have not yet used their current waste services provider and are thinking about approaching them (7%). SMEs have also used advisors from their professional bodies (26%), specialist waste consultants (24%), and other advisors who educate staff (24%).

Figure 2: Sources of advice used, planning to be used and not considered



9.3 WSPs and SME clients

Targeting the SME sector

SMEs often need to do their own recycling service needs analysis and research, and take the initiative themselves to contact WSPs and request a service. WSPs respond, in the main, to the requirements requested by the SME. 54% of WSPs rely on requests from SMEs as their main method to determine the need for new recycling services within individual or groups of SMEs.

How do WSPs provide information to SMEs?

WSPs surveyed report a heavy reliance on the use of their own website to communicate to SMEs about reducing waste, contamination and increasing recycling (38% mentioned this as their method of providing information).

The next tier of channels to reach SMEs rely heavily on local and state government information sources, both mentioned by 36% of WSPs.

The third tier of channels used relate to face-to-face conversations and email alerts (32% and 24% respectively) and then by fact sheets and information packs and handouts (20% and 16% respectively).

Other NGO websites and specialist consultants form the fourth tier of information channels used by WSPs to inform SMEs.

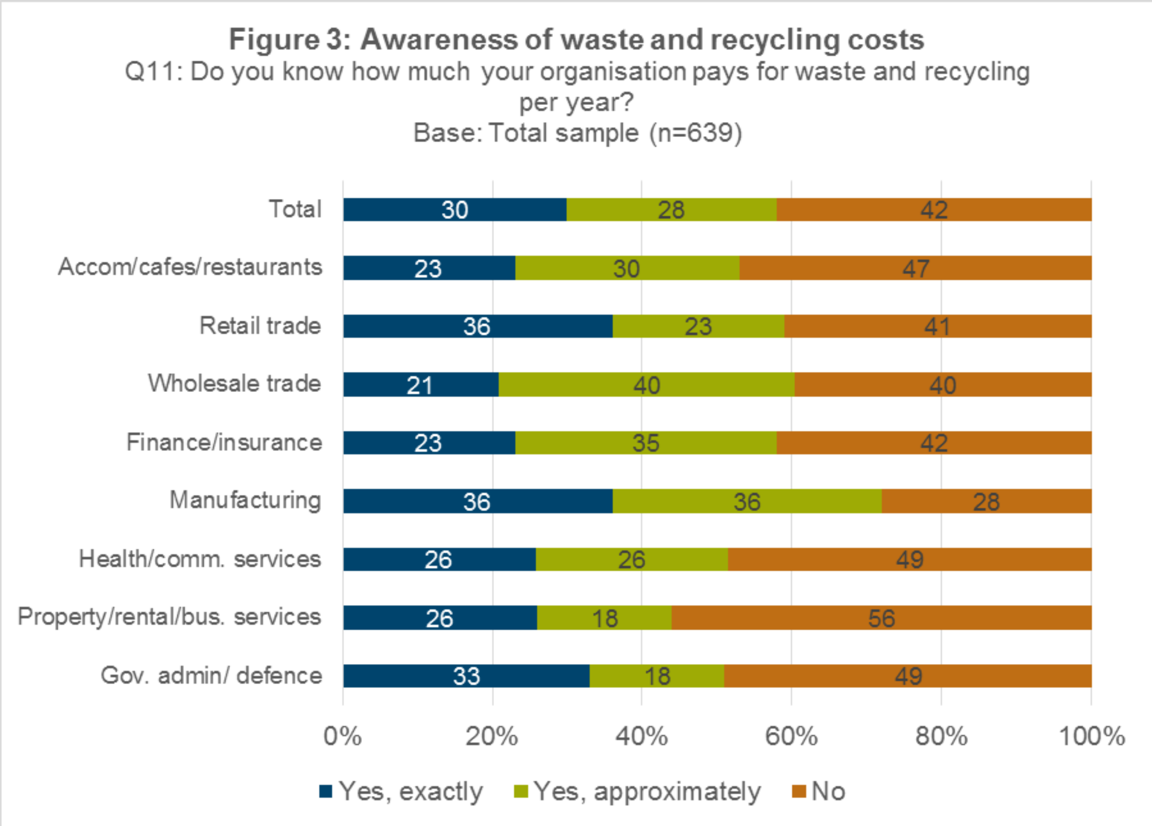
The website audit conducted as part of this study found that WSPs appear to rely heavily on their sales representatives and not on their website to provide information and to promote their services for SMEs. 69% of the WSP websites audited offered no waste reduction or recycling education services for SMEs. Only three in ten WSP websites provided booking services for SMEs.

9.4 Are SMEs aware of their waste costs?

SMEs divided into three groups regarding whether they were aware or not of their costs for recycling – see Figure 3. 30% claim they know exactly what their recycling costs are, 28% think they know the approximate cost and 42% do not know.

With satisfaction of recycling services high and many SMEs unaware of the cost of their waste and recycling, the results suggest the issue is not high on the agenda. Retail and manufacturing (both 6% over the average) are relatively more aware of the costs of waste and recycling.

Figure 3: Awareness of recycling and waste costs



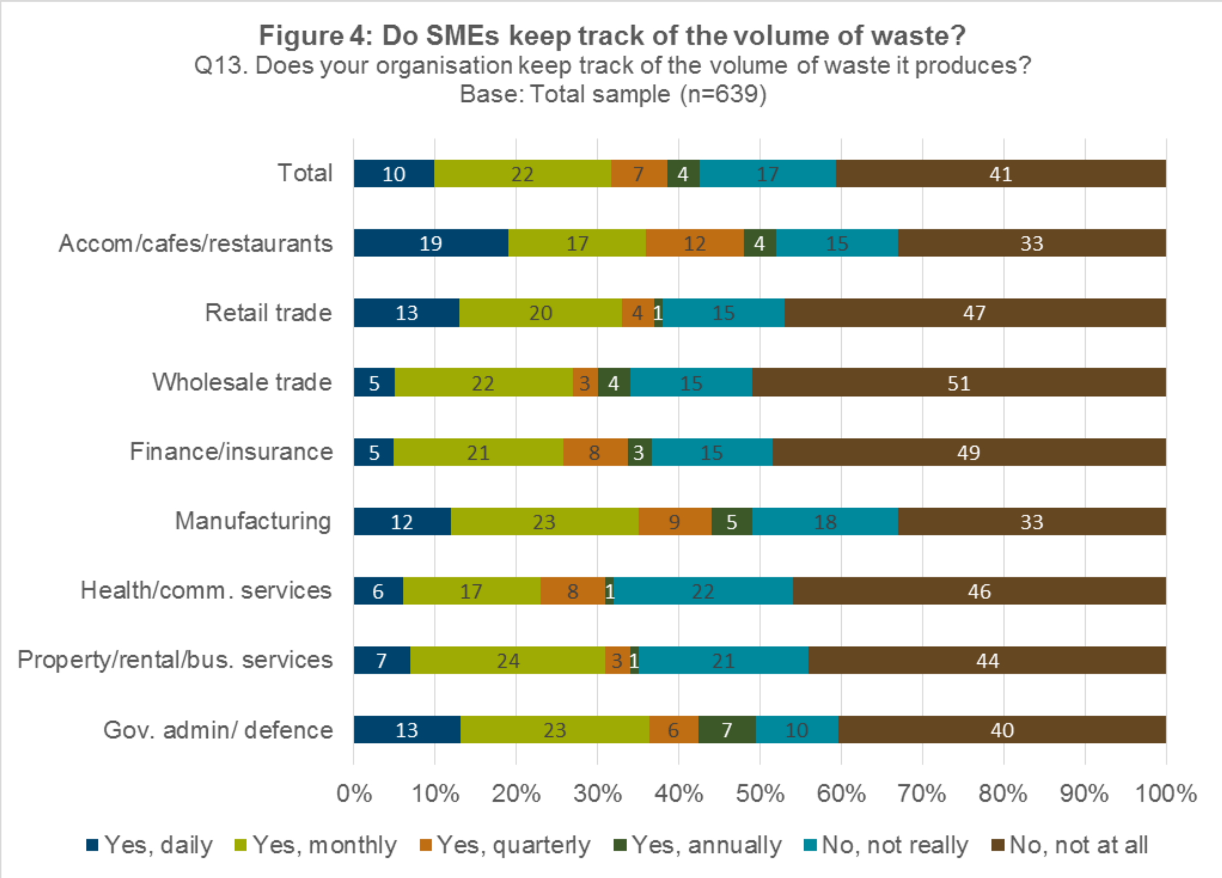
9.5 Do SMEs monitor their waste and recycling?

As shown in Figure 4, 10% SMEs are constantly vigilant in regard to the waste they produce. Almost another quarter (22%) monitor it monthly, 7% quarterly and 4% annually. However 58% keep virtually no records. Failure to understand the quantity of waste and to monitor it is another factor that is contributing to low levels of searching for and using information to better manage waste and recycling.

Accommodation/cafés/restaurants is the sector with the greatest focus on monitoring waste with 19% monitoring it daily (9% above the SME average).

The sectors least likely to monitor the volume of waste are health and community services (68%), wholesale trade (66%), property/rentals/business services (65%) and finance/insurance (64%).

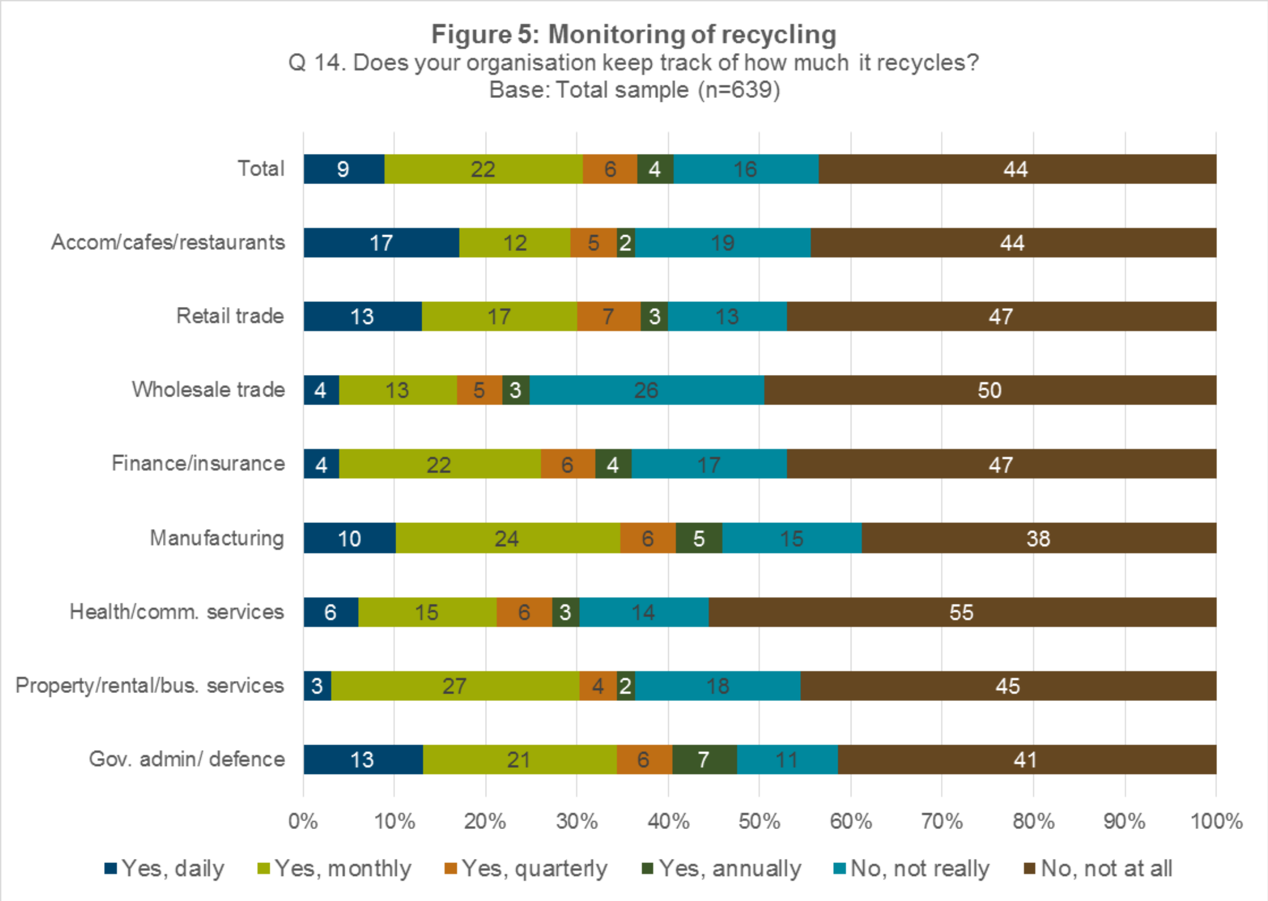
Figure 4: Monitoring of waste



A very similar pattern exists for monitoring the volume of waste that is recycled by SMEs – see Figure 5. Just under one in ten (9%) monitor the recycled volume daily, 22% monthly, 6% quarterly and 4% annually. Six in ten SMEs do not measure the volume of waste recycled at all.

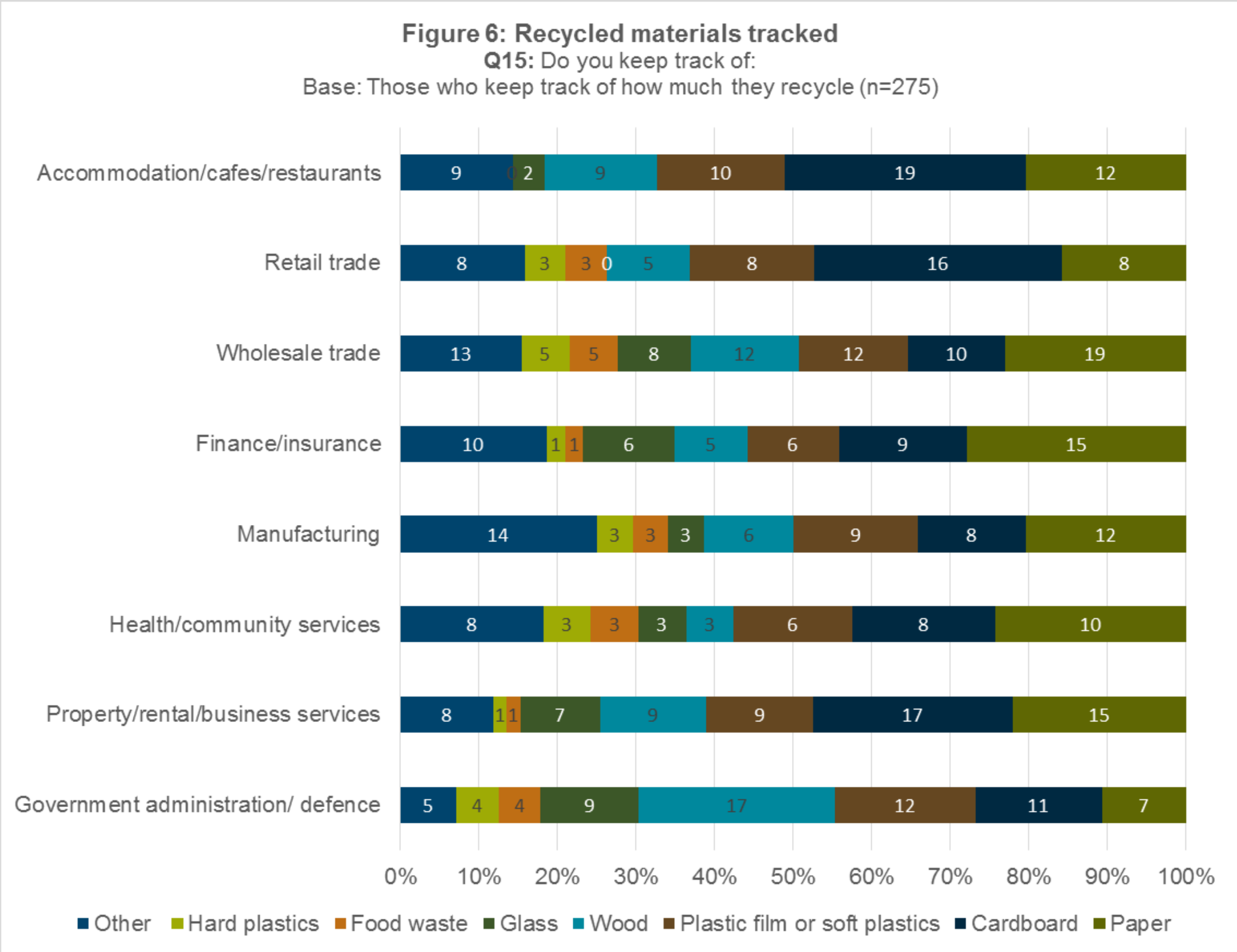
Again the accommodation/cafés/restaurants sector monitored the volume recycled the most frequently (17%, 8% above the SME average) while the wholesale trade sector monitored its recycled volume the least (76% not monitoring at all).

Figure 5: Monitoring of recycling



Of the four in ten SMEs that keep track of the materials recycled, most of the monitoring is done on paper (74%), cardboard (68%), and plastic film/soft plastics (45%). Wood, glass, food and hard plastics waste are all tracked by less than three in ten SMEs.

Figure 6: Recycled materials tracked



Sector analysis

Figure 6 and Table 5 show recycled materials tracked by each sector. In general terms industry sectors appear to be monitoring those materials that they commonly produce. This does not necessarily demonstrate a lack of will to monitor certain materials as it could be that the industry sector does not produce that material as a waste. Of the SMEs in the property/rental/business services sector that monitored recycling, almost all monitored the paper they recycled (97%). It was also very high for the finance/insurance sector (93%).

Cardboard recycling was monitored by 78% of the retail trade sector and 77% of accommodation/cafés/restaurant sector who tracked their recycled materials.

Property/rental and business services were vigilant with plastic film and soft plastics with 57% of SMEs in that sector monitoring and tracking this form of recycled material. They were also the most likely to keep track of wood (40%, 11% above the SME average), glass (43%, 18% above the SME average), food waste (34%, 9% above the SME average) and hard plastics (29%, 9% above the SME average).

The worst performing sector was wholesale trade which tracked at well below the SME sample average on all types of materials except cardboard.

Table 5: Recycled materials tracked by sector

Q15. Do you keep track of:

Base: Total sample who keep track of how much they recycle (n=275), Accommodation/cafés/restaurants (n=39), Retail trade (n=32), Wholesale trade (n=27), Finance/insurance (n=30), Manufacturing (n=41), Health/community services (n=29), Property/rental/business services (n=35), Government administration/defence (n=42).

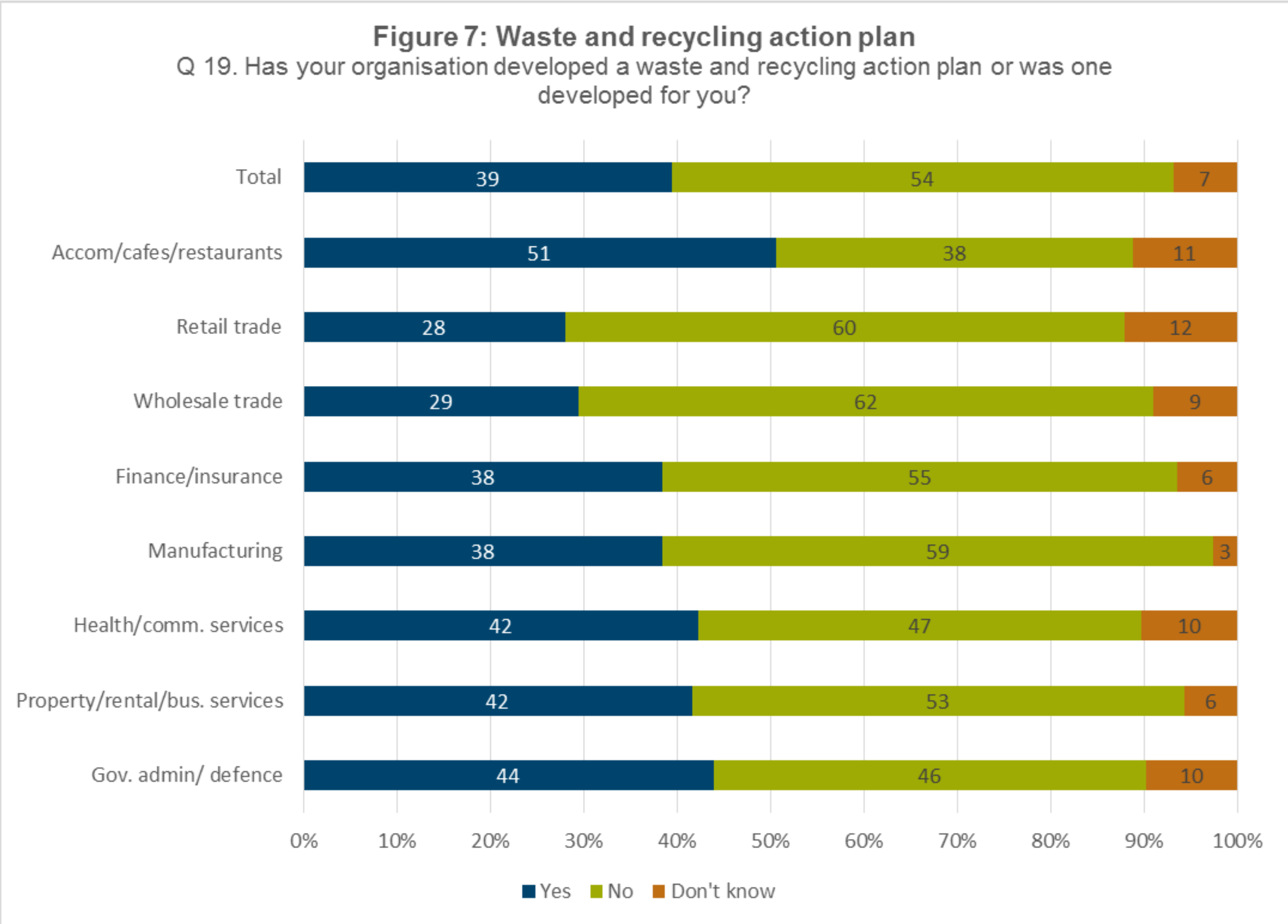
	Total	Accom./cafés/ restaurant	Retail trade	Wholesale trade	Finance/ insurance	Manufacturing	Health/ comm. services	Property/ rental/ bus. services	Gov. admin./ defence
N =	**275**	**39**	**32**	**27**	**30**	**41**	**29**	**35**	**42**
	%	**%**	**%**	**%**	**%**	**%**	**%**	**%**	**%**
Paper	74	82	75	52	93	54	76	97	83
Cardboard	68	77	78	74	60	61	62	71	74
Plastic film or soft plastics	45	44	34	30	40	46	24	57	50
Wood	29	18	22	22	27	32	14	40	26
Glass	25	33	13	7	17	20	14	43	33
Food waste	25	41	22	7	23	22	21	34	24
Hard Plastics	20	23	19	15	17	22	7	29	14
Other	17	10	16	19	0	27	17	9	19

9.6 Do SMEs have a waste and recycling action plan?

Almost four in ten SMEs (39%) claim to have a waste and recycling action plan, 54% don't and 7% don't know – see Figure 7. The presence of an action plan is most common in the accommodation/café and restaurant sector (51% have one which is 12% over the SME sample average). The least likely sector to have an action plan is the retail trade sector (28% and 11% under the sample average) and the wholesale trade sector (10% under the sample average).

Figure 7: Waste and recycling action plan

Base: Total sample (n=639), Accomodation/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)



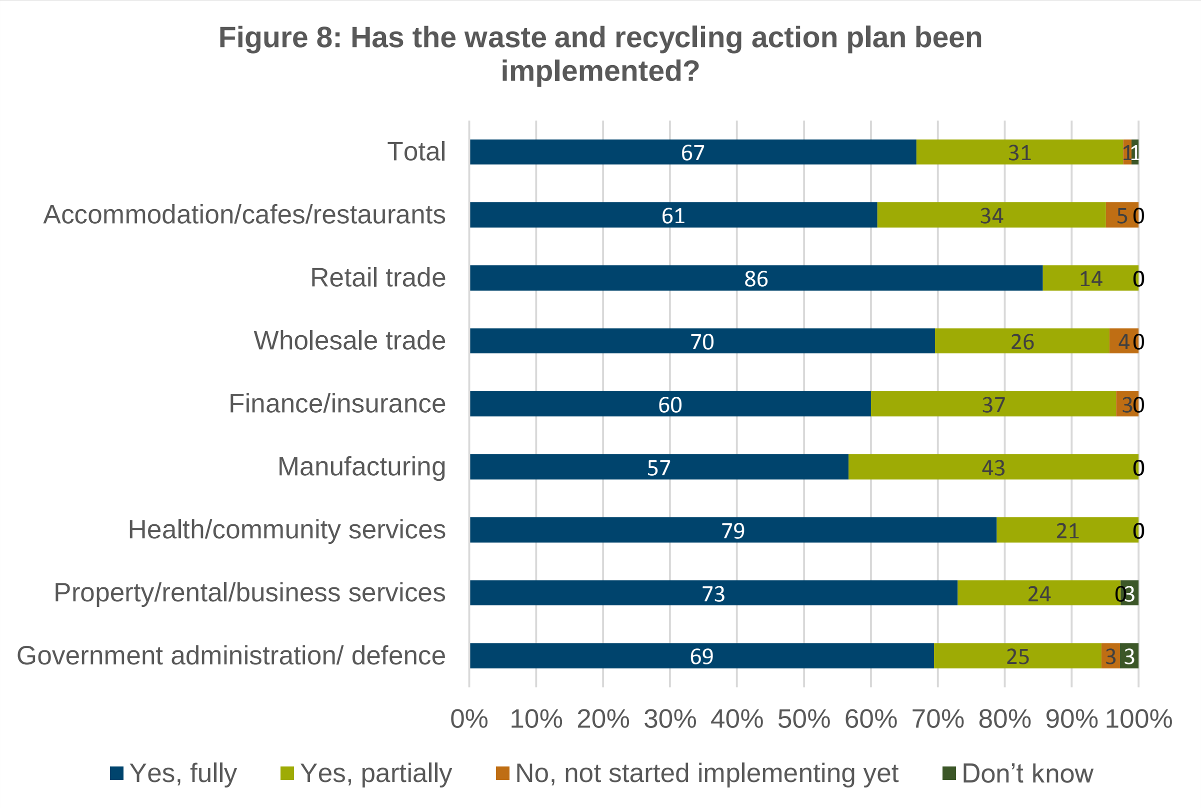
Of the SMEs with a recycling plan (39% of the sample) most claim to have implemented the plan (67% fully and 31% partially) – see Figure 8.

The retail trade sector is the most likely to have implemented the waste and recycling action plan (86% in full and 14% partially). However, the manufacturing sector is the least likely to have fully implemented the waste and recycling action plan with 57% of those with a plan fully implementing it and 43% having partially implemented it.

Figure 8: Has the waste and recycling action plan been implemented?

Q 20. Has your organisation implemented its waste and recycling action plan?

Base: Total sample who developed action plan (n=251), Accommodation/cafes/restaurants (n=41), Retail trade (n=21), Wholesale trade (n=23), Finance/insurance (n=30), Manufacturing (n=30), Health/community services (n=33), Property/rental/business services (n=37), Government administration/ defence (n=36).



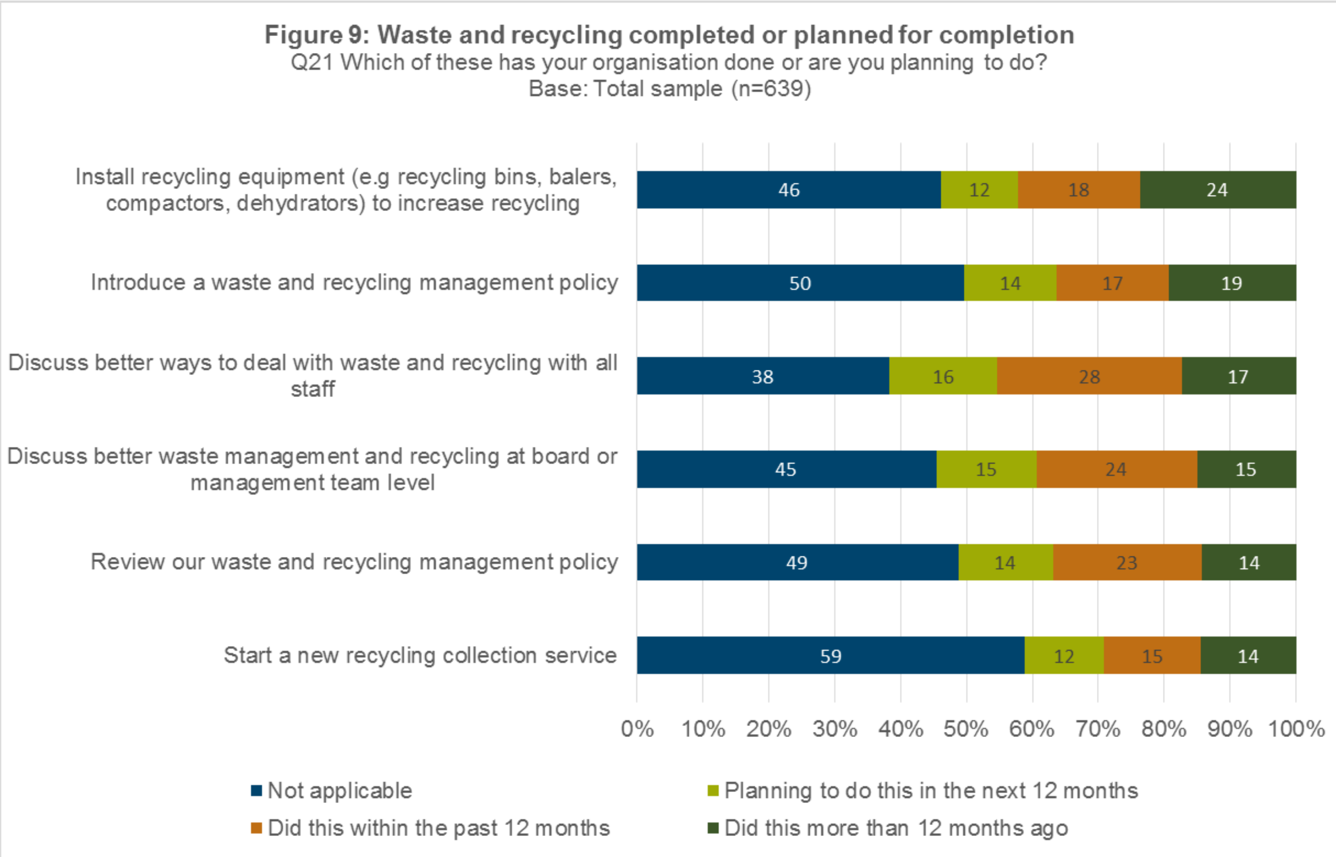
9.7 What waste and recycling actions are SMEs doing?

See Figure 9 and Table 6:

- Almost one quarter of SMEs (24%) have installed recycling bins or equipment more than 12 months ago, 18% did this within the past 12 months and a further 12% are planning to in the next 12 months.
- Almost one in five (19%) have introduced a waste and recycling management policy more than 12 months ago, 17% did this within the past 12 months and 14% are planning to do so in the next 12 months.
- 17% have discussed better ways to deal with waste and recycling with their staff more than 12 months ago, 28% did this within the past 12 months and 16% intend to.

- Virtually the same proportion (15%) has discussed it at board meetings more than 12 months ago, 24% did this within the past 12 months and another 15% intend to.
- 14% have reviewed the policy and started a new recycling collection service over 12 months ago, 15% did this within the past 12 months and 12% intend to do this in the next 12 months.

Figure 9: Waste and recycling actions completed or planned for completion



Sector analysis

Key implementation strategies planned for the next 12 months:

- Accommodation/cafés/restaurants: review policy (+3%, i.e. 3% above the SME average), discuss at board (+5%), discuss with staff (+6%) and install recycling equipment (+3%)
- Wholesale trade: review policy (+3%), discuss with staff (+6%)
- Manufacturing: introduce a new policy (+3%), discuss with staff (+3%) and install recycling equipment (+3%)
- Health and community services: review policy (+3%), start a new recycling collection service (+3%)
- Government/administration/defence: introduce a new policy (+4%), review the waste management policy (+3%), discuss at board (+8%), discuss with staff (+7%) and install recycling equipment (+8%).

Table 6: Waste and recycling actions completed or planned for completion – sector analysis

Q21. Which of these has your organisation done or are you planning to do?									
	Total	**Accom./cafés/ restaurants**	**Retail trade**	**Wholesale trade**	**Finance/ insurance**	**Manufacturing**	**Health/ comm. services**	**Property/ rental/bus. services**	**Gov. admin./ defence**
N=	**639**	**81**	**75**	**78**	**78**	**78**	**78**	**89**	**82**
	%	**%**	**%**	**%**	**%**	**%**	**%**	**%**	**%**
Introduce a waste and recycling management policy									
More than 12 months ago	19	25	20	19	22	14	21	22	21
Within the past 12 months	17	25	19	10	15	17	15	15	22
Planning to do in next 12 months	14	11	7	13	9	17	14	13	18
Not applicable	50	40	55	58	54	53	50	49	39
Review our waste and recycling management policy									
More than 12 months ago	14	15	12	9	14	9	18	15	24
Within the past 12 months	23	30	19	22	18	28	21	24	16
Planning to do in next 12 months	14	17	11	17	13	13	17	15	17
Not applicable	49	38	59	53	55	50	45	47	43

Q21. Which of these has your organisation done or are you planning to do?									
	Total	**Accom./cafés/ restaurants**	**Retail trade**	**Wholesale trade**	**Finance/ insurance**	**Manufacturing**	**Health/ comm. services**	**Property/ rental/bus. services**	**Gov. admin./ defence**
Discuss better waste management and recycling at board or management team level									
More than 12 months ago	15	20	12	10	13	13	14	16	22
Within the past 12 months	24	26	27	18	23	29	27	22	17
Planning to do in next 12 months	15	20	5	14	13	17	13	12	23
Not applicable	45	35	56	58	51	41	46	49	38
Discuss better ways to deal with waste and recycling with all staff									
More than 12 months ago	17	22	13	10	17	14	22	19	22
Within the past 12 months	28	30	31	24	24	29	31	30	23
Planning to do in next 12 months	16	22	7	22	13	19	12	11	23
Not applicable	38	26	49	44	46	37	36	39	32
Start a new recycling collection service									
More than 12 months ago	14	15	17	10	13	15	8	13	18
Within the past 12 months	15	22	13	8	15	21	13	12	9

Q21. Which of these has your organisation done or are you planning to do?									
	Total	**Accom./cafés/ restaurants**	**Retail trade**	**Wholesale trade**	**Finance/ insurance**	**Manufacturing**	**Health/ comm. services**	**Property/ rental/bus. services**	**Gov. admin./ defence**
Planning to do in next 12 months	12	11	4	13	9	12	15	9	21
Not applicable	59	52	65	69	63	53	64	65	52
Install recycling equipment (e.g. recycling bins, balers, compactors, dehydrators) to increase recycling									
More than 12 months ago	24	22	24	18	27	19	18	28	29
Within the past 12 months	18	23	15	14	15	21	18	19	18
Planning to do in next 12 months	12	15	4	5	5	15	8	9	20
Not applicable	46	40	57	63	53	45	56	44	33

9.8 What do SMEs think are their barriers to further waste reduction and recycling?

In the preliminary interviews that led to the development of this benchmark survey, SMEs reported time pressures as being the number one barrier to making more changes regarding their waste reduction and recycling improvements.

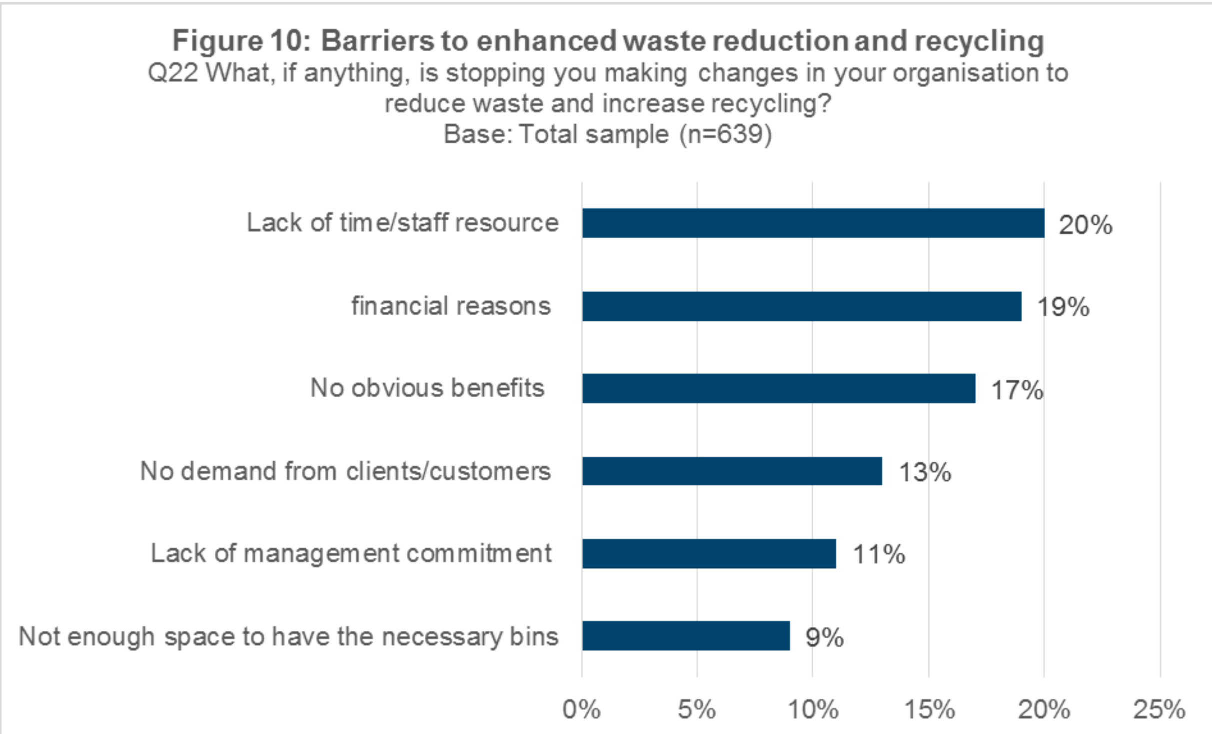
In other recent research conducted by Instinct and Reason in unrelated areas with SMEs for both state and Federal government agencies, financial barriers consistently feature prominently with many SMEs reporting the challenges of cash flow and poor access to capital for funding improvements to their business.

Lack of knowledge about what could be done, along with the relatively low cost, lead many SMEs to say there are no obvious benefits to doing more with waste and recycling (17%). SMEs also cite a lack of demand from customers for change (13%), lack of management commitment to change (11%), lack of space for bins (9%) and risks to their operation that might be involved in doing more (7%).

Lack of space for bins was cited as a barrier for only 9% of SMEs, yet a much larger proportion of SMEs agree it was a barrier in the attitudinal barriers section of the survey (Figure 1 and Table 4; Q17) (37% either strongly agreed or tend to agree). While Figure 10 (Q22) identifies space as an issue for a significantly lower number of SMEs it still is the number one reason for inaction followed by risks (7%). The other reasons cited are not objective barriers just subjective attitudes to the issue.

Only 7% cited lack of information and tailored information as being a barrier to action. This also emphasises the belief of many SMEs that all that can be done has been done, and that information search for new ideas is low on the SME agenda. In contrast, one third of all SMEs interviewed stated there was nothing stopping them.

Figure 10: Barriers to enhanced waste reduction and recycling



Sector analysis

Key barriers for:

- Accommodation/cafés/restaurants: lack of time (+7%, i.e. 7% above the SME average), finance (+8%), cost of equipment (+9%)
- Retail trade: 40% nothing stopping them (+7%); not sure what to do (+7%)
- Wholesale trade: 42% nothing stopping them (+9%); financial reasons (+5%)
- Finance/insurance: 40% nothing stopping them (+7%)
- Manufacturing: financial reasons (+7%)
- Health and community services: lack of time (+4%), no demand from clients (+8%), risks involved (+8%)
- Property/rental/business services: no obvious benefits (+12%)
- Government/administration/defence: lack of management commitment (+6%)

Table 7: Barriers to enhanced waste reduction and recycling – sector analysis

Q22. What, if anything, is stopping you making changes to reduce waste and increase 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).

	Total	**Accom./cafés /restaurants**	**Retail trade**	**Wholesale trade**	**Finance/ insurance**	**Manufacturing**	**Health/ comm. services**	**Property/ rental/bus. services**	**Gov. admin./ defence**
N =	**639**	**81**	**75**	**78**	**78**	**78**	**78**	**89**	**82**
	%	**%**	**%**	**%**	**%**	**%**	**%**	**%**	**%**
None of these/nothing stopping us	33	28	40	42	40	33	26	26	35
Lack of time/staff resource	20	27	15	21	18	22	24	18	16
Financial reasons	19	27	20	24	15	26	13	16	11
No obvious benefits	17	17	5	13	14	19	9	29	12
No demand from clients/customers	13	15	7	10	17	12	21	16	12
Lack of management commitment	11	11	13	12	12	10	12	7	17
Not enough space for necessary bins	9	10	4	10	6	10	8	11	6

Q22. What, if anything, is stopping you making changes to reduce waste and increase recycling?									
Lack of information/advice relevant to your organisation	7	7	8	8	6	9	3	6	10
Risks involved (e.g. interfering with product/service quality)	7	9	4	1	8	6	15	4	11
Costs of recycling equipment	6	15	4	8	1	5	5	6	7
Lack of recycling services available to this business or in this area	6	7	4	5	6	5	1	8	9
Don’t own our premises/landlord won’t make changes	6	10	5	5	9	3	6	6	7
Not sure what to do	5	9	12	6	5	5	13	0	5
Not frequent enough pick ups	4	4	4	4	6	6	3	3	2
May make our business uncompetitive	3	5	1	1	0	4	0	1	6
Other factor/s stopping us	7	10	13	13	4	5	4	7	10

9.9 WSP barriers to providing SMEs with services to increase recycling

30% of WSPs say they either don't know or can't recall what barriers they face in providing SMEs with better waste and recycling services. This might suggest that providing improved services to SMEs is not front of mind for WSPs or that they have not investigated the business case for or against in any detail.

The main reason WSPs hold back on services to increase recycling is the size of the pick-up. This was mentioned by 26% of WSPs surveyed (see Figure 11).

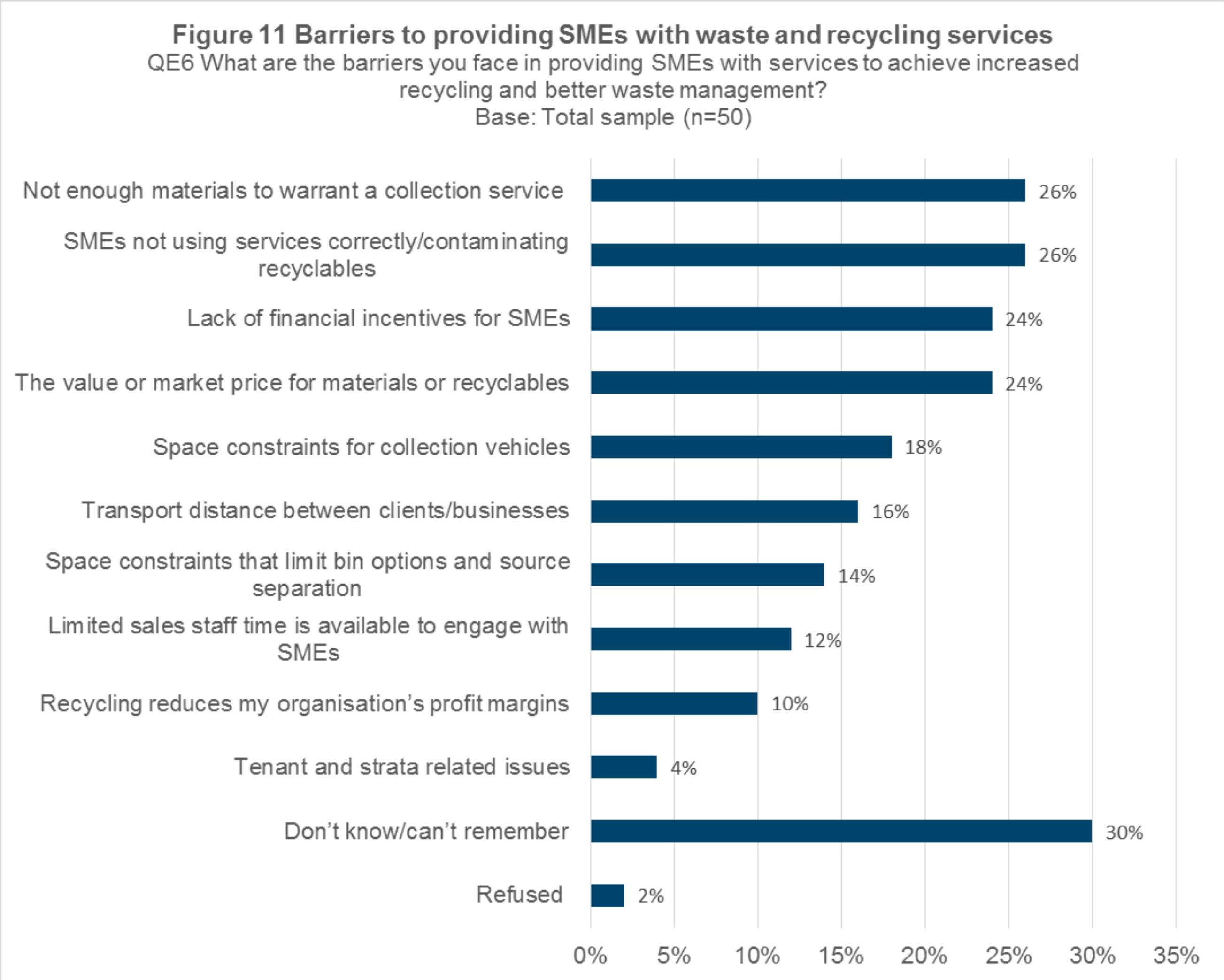
Another key issue is that SMEs' recycling is contaminated and this causes issues and often results in withdrawal of services.

Again, linked to the size of the pick-up, there can be little financial incentive for SMEs to go through the trouble of separating waste and having it recycled (mentioned by 24%). Similarly the market price for recyclables is not driving interest for small collections (24%).

Space for collection vehicles (18%) and distance between clients (16%) are other contributing factors that make some SME recycling unprofitable.

Finally the trouble of dealing with 'many' small customers can make the arrangement unprofitable which ties in with mentions of complications caused by strata- and tenant-related issues.

Figure 11: Barriers to providing SMEs with waste and recycling services



9.10 SMEs and recycling equipment

42% of SMEs claim to have installed new recycling equipment such as recycling bins, balers, compactors or dehydrators in the past two years.

However, few SMEs claim to currently have significant recycling equipment in place, with only 7% having a composter, 6% a baler, 6% a compactor and 4% a dehydrator. The property sector was more likely than other industry sectors to have balers and compactors than the average.

Financial reasons were cited as a barrier to further waste reduction and recycling by 19% of SMEs. 6%of SMEs cited the specific cost of recycling equipment as a barrier to further recycling. Just under three in ten (27%) of SMEs are open to financial assistance to install recycling equipment and a further 28% may possibly be open to it. Those open to purchasing equipment would use it to recycle more cardboard (80%), plastic film (74%), rigid plastics (71%) food (64%), timber (63%) and expanded polystyrene (59%).

In particular the accommodation and restaurant/café sector would use investment in equipment to recycle food; the retail sector for cardboard; the wholesale sector for cardboard, plastic film and expanded polystyrene; the finance sector for timber; the health sector for plastic film and the government sector to recycle more rigid plastics.

9.11 Are SMEs willing to invest in waste reduction measures?

See Figure 12. Some SMEs take the long view on investment return when it comes to financial investment in waste reduction measures. One in twenty (5%) would invest in waste reduction with a ten-year payback, 7% for a 6–9 year payback and 12% for a 4–5 year payback. That means one quarter (24%) of all SMEs would invest in waste reduction measures with a long-term payback (4–10 years). Furthermore, another 14% indicate they would invest in waste reduction measures for reasons other than financial payback.

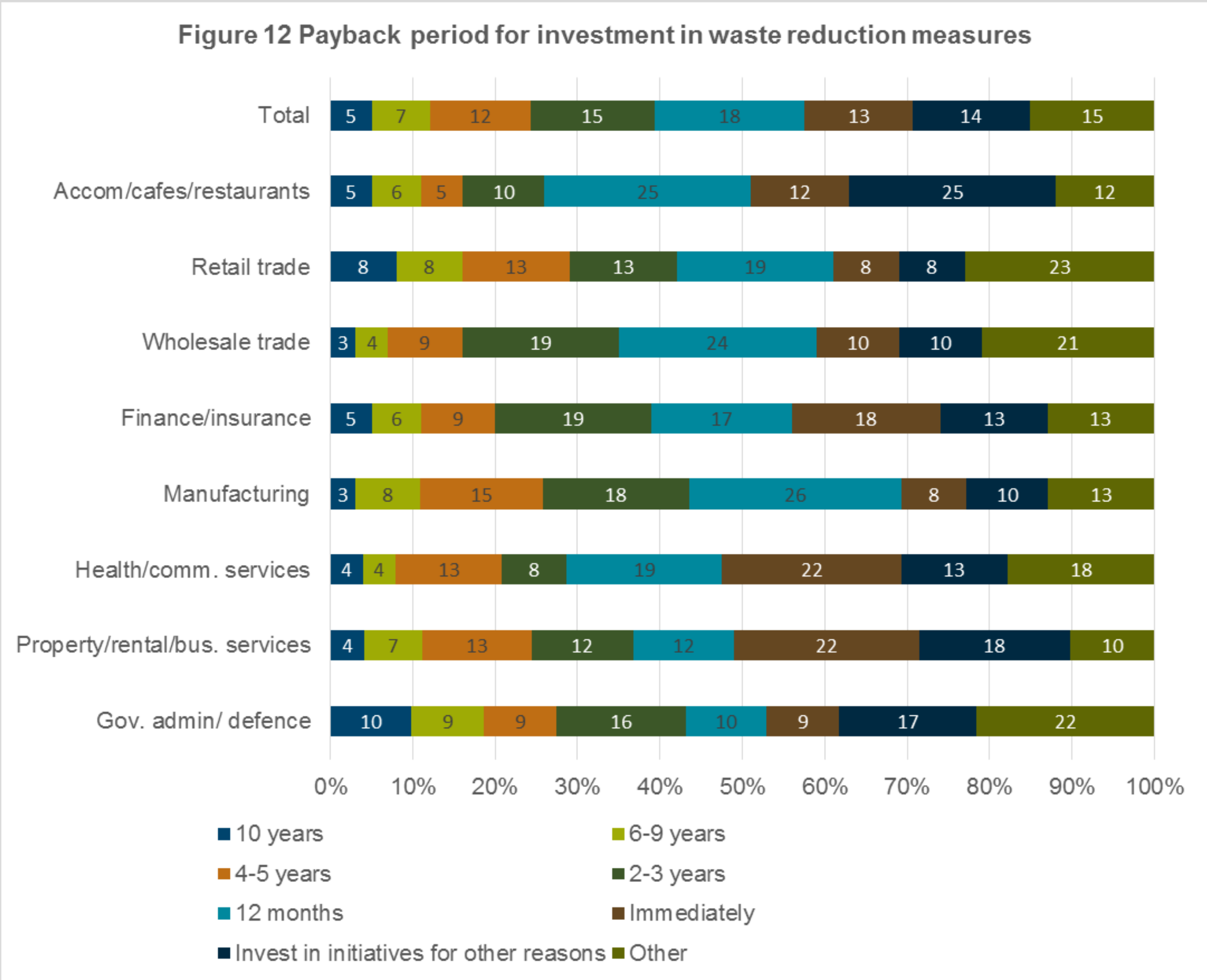
A further 15% of SMEs indicate interest in a medium-term, 2–3 year payback.

Almost one in five (18%) SMEs require a 12-month payback period in order to justify the investment in waste reduction measures and 13% even less time.

Investment appetite for a medium- to long-term payback on waste reduction measures (2–10 years) was highest in the manufacturing sector and government/administration/defence (both 44%).

Figure 12: Payback period for investment in waste reduction measures

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 measure to pay for themselves?



9.12 Impact of financial assistance on installation of new recycling equipment

See Figure 13. 27% of SMEs interviewed indicated financial assistance would definitely encourage action on installing new recycling equipment. A further 28% indicated it might possibly trigger installation.

The accommodation/café/restaurant sector was most interested (37% yes definitely), followed by manufacturing (33% yes definitely) and government/administration/defence (32% yes definitely).

The finance/insurance sector was least interested (only 13% yes definitely) as was the health and community services sector (with only 15% yes definitely).

Figure 13: Impact of financial assistance

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

Base: Total sample (n=639), Accomodation/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).

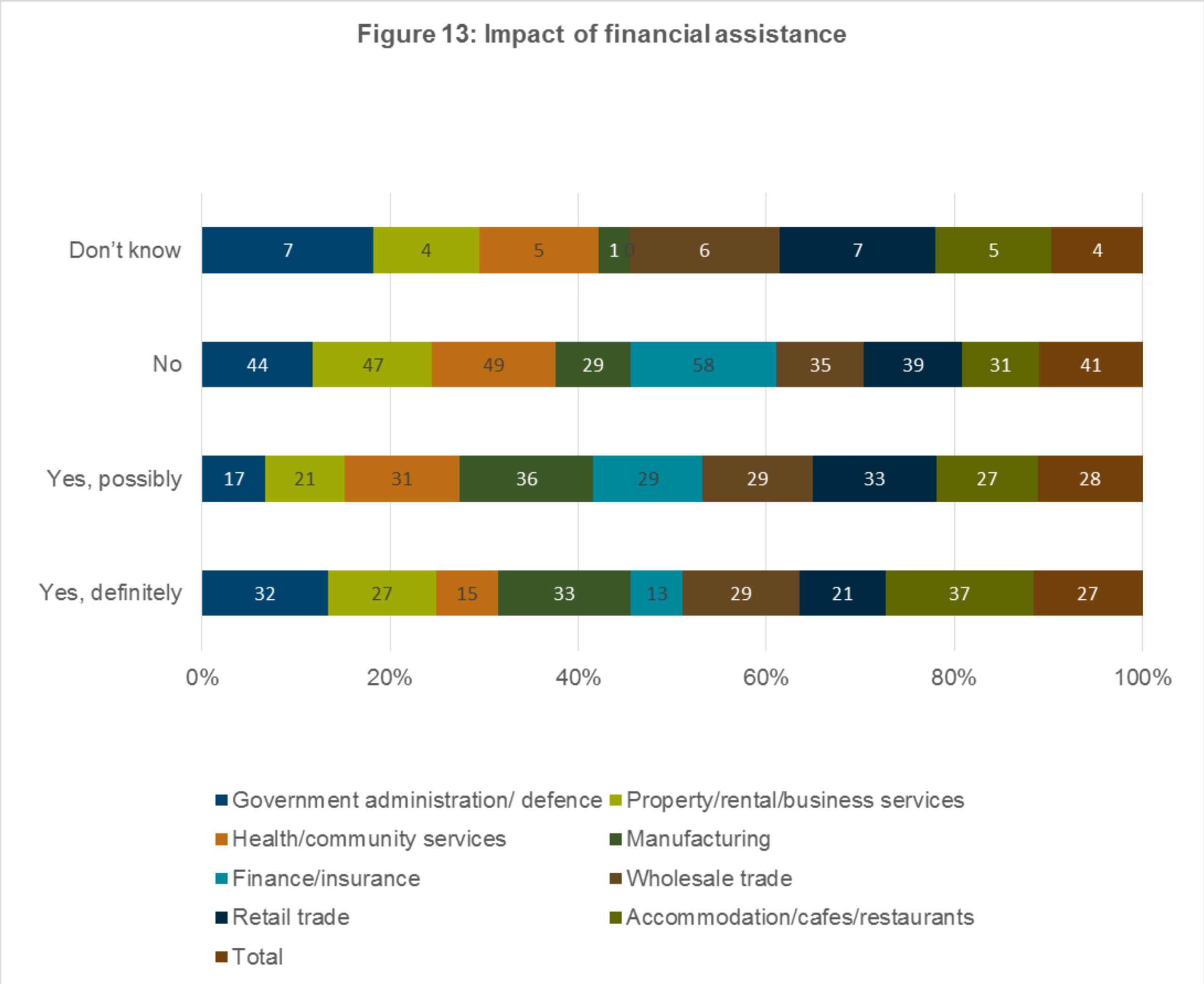
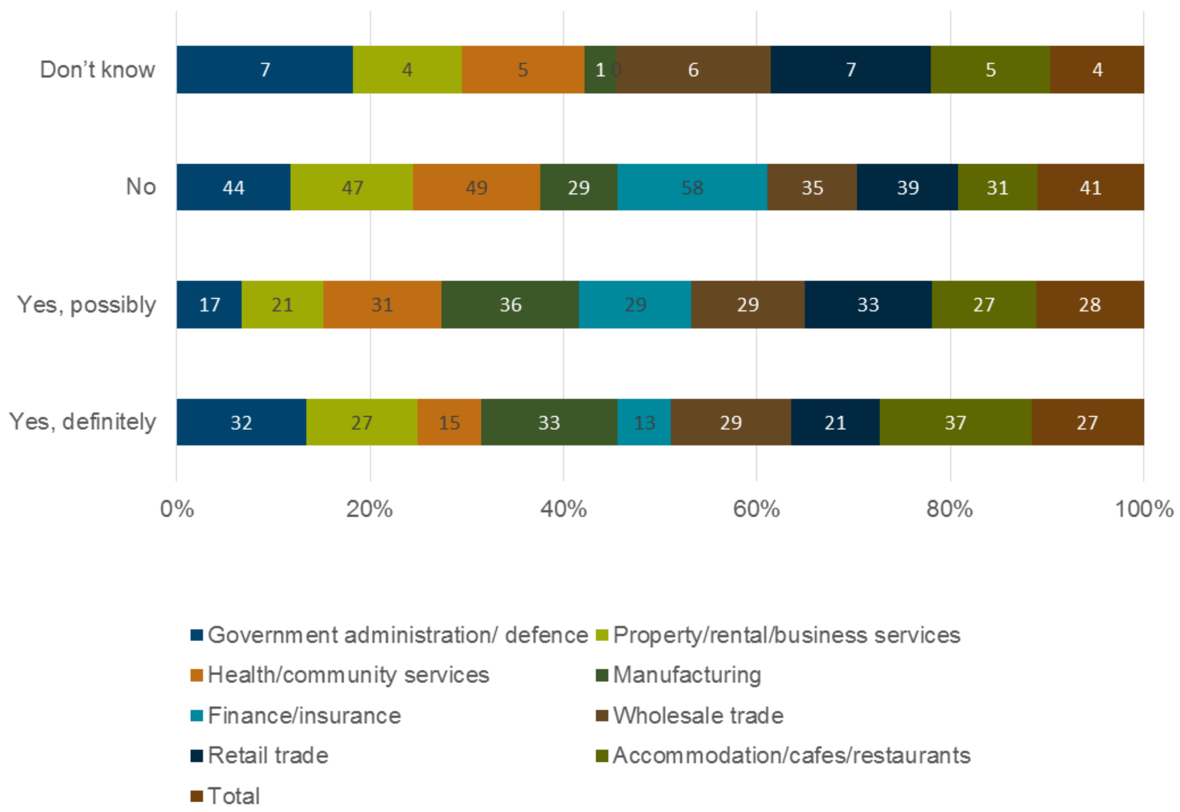


Figure 13: Impact of financial assistance

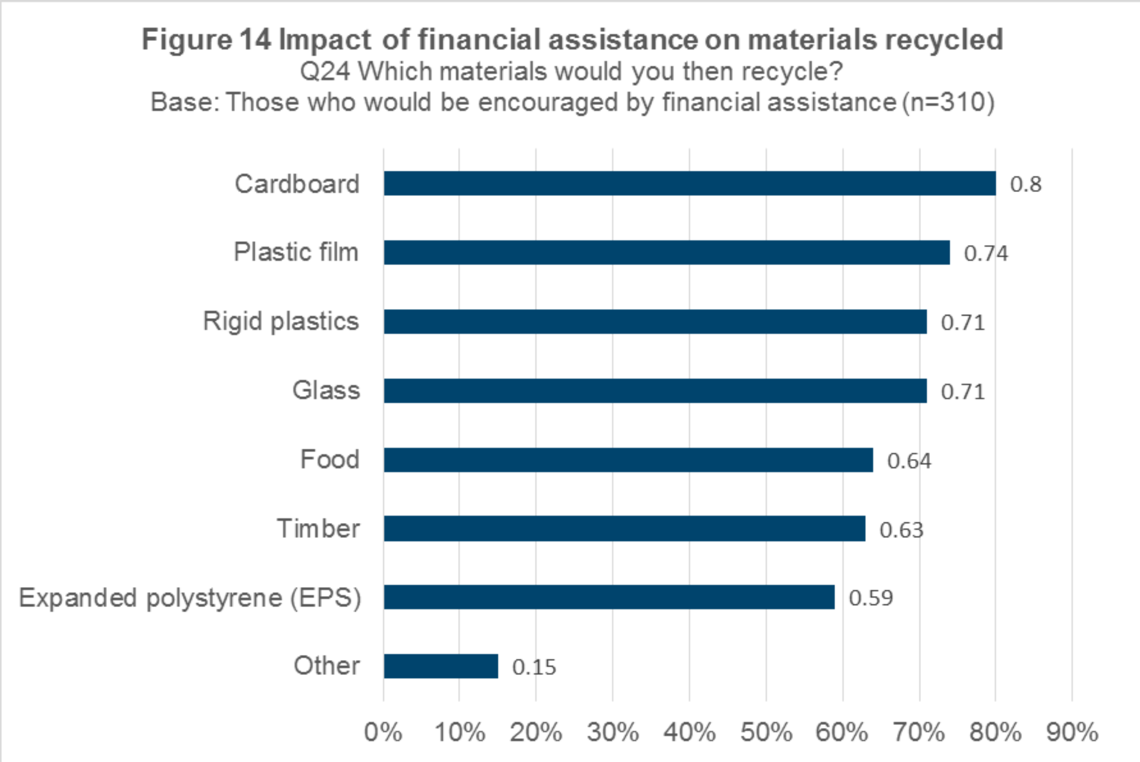


What materials would be recycled with investment support?

The new investments would be focused on the materials widely recycled already – namely cardboard (80%), plastic film (74%) and rigid plastics (71%).

However, investment assistance is likely to lead to more of the less-recycled products being recycled as well, with 71% of SMEs who want the investment assistance saying they would recycle glass, 64% food, 63% timber and 59% expanded polystyrene (see Figure 14 and Table 8).

Figure 14: Impact of financial assistance on materials recycled



Sector analysis

The wholesale trade sector would use investment assistance to recycle cardboard (14% above the SME average), expanded polystyrene (12% above the SME average), plastic film (11% above the SME average), food (10% above the SME average), timber (8% above the SME average), and glass (5% above the SME average).

The retail trade sector would be less likely than other sectors to use the investment to increase recycling across most types of materials.

Table 8: Sector analysis – impact of financial assistance on materials recycled

Q24. Which materials would you then recycle?

Base: Total sample who would be encouraged by financial assistance (n=310), Accommodation/cafés/restaurants (n=43), Retail trade (n=38), Wholesale trade (n=34), Finance/insurance (n=33), Manufacturing (n=50), Health/community services (n=33), Property/rental/business services (n=41), Government administration/defence (n=38)

	Total	Accom./ cafés/ restaurants	Retail trade	Wholesale trade	Finance/ insurance	Manufacturing	Health/ comm. services	Property/ rental/bus. services	Gov. admin./ defence
N =	**639**	**81**	**75**	**78**	**78**	**78**	**78**	**89**	**82**
	%	**%**	**%**	**%**	**%**	**%**	**%**	**%**	**%**
Cardboard	80	86	68	94	76	78	73	83	84
Plastic film	74	84	63	85	82	74	61	68	84
Glass	71	65	61	76	61	70	58	80	82
Rigid plastics	71	74	63	76	67	68	70	68	87
Food	64	77	47	74	55	62	64	68	71
Timber	63	60	55	71	48	66	45	63	71
Expanded polystyrene (EPS)	59	58	53	71	48	60	55	59	68
Other	15	12	13	18	3	22	12	15	8

9.13 Profile of SMEs who say 'we don't know how to reduce waste'

Table 9 outlines which kinds of SMEs agree and tend to agree with the statement 'We don't know how to reduce waste or improve recycling but would be interested if help were available'. There is no statistically significant skew to any sector in particular.

Table 9: Profile of SMEs who say 'we don't know how to reduce waste'

(+/-the rest of the sample; the rest of the sample) at 0.05 significance level. With the rest of the sample being those who have no opinion either way + those who disagree + those who strongly disagree with the statement 'We don't know how to reduce waste or improve recycling but would be interested if help were available') They are more likely to …
Their business currently has recycling services for:
Food (+9%; 16%)
Co-mingled waste (+7%; 11%)
Composter (+5%; 5%)
Baler (+5%; 4%)
Dehydrator (+5%; 2%)

Information availability, awareness and knowledge:
Their organisation is **not that well informed** about the information, advice and support that is available to help better manage waste and control waste removal and recycling costs (+12%; 10%)
Fairly difficult for their organisation to get tailored advice or support on how to better manage waste and control waste removal and recycling costs (+6%; 8%)
Their organisation has **actively sought** information/advice/support (+15%; 26%)
Obtained information from: • personal referrals (other businesses, industry colleagues, friends) (+10%; 29%) • telephone helplines (+8%; 6%) • information via Facebook, Twitter, RSS feeds (+7%; 9%)

Advice and support:
Used: • online education programs (+10%; 13%) • workshops and seminars (+7%; 17%) • waste and recycling calculators (+6%; 14%)
Not used but planned to use: • business case tools and templates (+8%, 10%) • case studies of organisations who have reduced waste and increased recycling (+6%; 11%) • business recycling search directories (businessrecycling.com.au) (+6%; 14%)
Not at all aware/not that aware about the steps they can take to better manage waste and recycling (+11%; 12%)

Definitely agree that financial assistance would encourage them to install recycling equipment (+25%; 19%)

Invest in waste reduction measures:
Would invest if it paid for itself within 6–9 years (+5%; 5%)
Would invest if it paid for itself within 4–5 years (+5%; 10%)

Attitudes – Strongly agree and agree:
Don't have space to fit the extra bins needed to reduce waste and recycle effectively (+28%; 27%)
Haven't received advice, but doubt that the organisation can afford the initial expense to improve its waste and recycling service (+27%; 27%)
Have received advice and the organisation can't afford the initial expense to improve its waste and recycling service (+19%; 21%)
Being efficient with waste and recycling gives businesses a competitive edge (+17%; 47%)
Being able to tell clients/customers that recycle as much as possible helps win or retain business (+14%; 35%)
Reducing waste and increasing recycling is part of being a sustainable and ethical business (+7%; 74%)

Barriers – these barriers are stopping the organisation from making changes to reduce waste and increase recycling:
Lack of information/advice relevant to your organisation (+13%; 3%)
Financial reasons (+10%; 15%)
Lack of time/staff resources (+9%; 16%)
Risks involved (e.g. interfering with product/service quality) (+8%, 4%)
Not sure what to do (+8%; 3%)
Lack of recycling services available to this business or in this area (+6%; 4%)
Not enough space to have the necessary bins (+5%; 7%)

NSW EPA Bin Trim program:
Definitely seen, read or heard of Bin Trim (+7%; 9%)
Definitely received a free Bin Trim assessment (+39%, 17%)
Definitely recommend a Bin Trim assessment to other businesses (+52%; 30%)

9.14 Impact of the Bin Trim program

One in five of the SMEs interviewed reported being aware of the Bin Trim program (12% definitely and 8% possibly). Of this group of aware SMEs, 34% of those being interviewed said they had definitely had a Bin Trim assessment and a further 28% had possibly had one.

The profile of those SMEs that have definitely and have possibly had a Bin Trim assessment is markedly different from those that hadn't (see Table 10).

Table 10: Profile of SMEs that had undertaken a Bin Trim assessment

(+/- the rest of the sample; the rest of the sample) at 0.05 significance level
They are more likely than those that had not undertaken an assessment:
Demographics:
To be based in Sydney (+33%; 57%)
To have 50–99 employees (+18%; 8%) and 100–199 employees (+23%; 15%)
Behaviours
To recycle at all (+12%; 85%)
To recycle timber (+28%; 18%), co-mingled waste (+21%; 16%)
To have a composter (+29%: 2%), and a compactor (+27%; 3%)
To have actively sought information/advice/support (+54%: 27%)
To have made use of workshops and seminars as a source of advice or support (+34%; 42%), online seminars (+25%; 29%), business case tools and templates (+24%, 25%), good practice guides (+24%, 42%), fact sheets (+30%, 38%), waste and recycling calculators (+32%; 24%), industry reports on how to improve (+22%, 33%)
To be planning to use waste and recycling helplines (+22%; 23%)
To have changed waste services or systems because they received advice (+50%; 17%) and used mentors who know about waste and recycling in their sector (+25%; 31%) and advisors that engage and educate staff (+28%; 33%)
Attitudes
To agree that it's very easy to get tailored advice or support on how to better manage waste and control their waste removal and recycling costs (+24%; 28%)
To know exactly how much they pay for waste and recycling per year (+50%; 30%) and where the waste is produced (+35%; 32%)
To keep track of the waste produced daily (+34%; 12%) and what is recycled daily (+22%; 10%)
To agree that they don't know how to reduce waste or improve recycling but would be interested if help were available (+31%; 23%)
To say they've received advice and the organisation can't afford the initial expense to improve their waste and recycling service (+29%; 29%)
To know they don't have space to fit the extra bins needed to reduce waste and recycle effectively (+24%; 29%)
To definitely agree that financial assistance would encourage them to install recycling equipment (+32%; 29%)

The key impacts of the Bin Trim assessment appear to be threefold. Firstly SMEs are much more likely to have an action plan in place. Secondly management is more likely to be focusing on the issue with reviews of their waste and recycling policies. Finally they are likely to be on the lookout for new (presumably better) waste and recycling systems.

However, as knowledge increases about waste and recycling (through participation in waste assessment programs such as Bin Trim) the barriers to taking the next steps become clearer to SMEs. Future government assistance is still likely to be of value in overcoming these barriers.

To reinforce the findings from this benchmark study, the EPA Audit and Review Team conducted a survey during late May/early June 2015 with 1023 Bin Trim SMEs. They found 93% of the surveyed SMEs said they had implemented all or some of their action plan recommendations; 83% said their recycling had already increased as a result of adopting new waste management and recycling procedures, and nearly 63% said they will save money as a result of the Bin Trim program (NSW EPA, 2015 Unpublished).

Table 11: Profile of SMEs that had undertaken a Bin Trim assessment

(+/-)the rest of the sample; the rest of the sample) at 0.05 significance level
Impacts
Has developed a waste and recycling action plan or had one developed for them (+37%; 51%)
Reviewed waste and recycling management policy in the past 12 months (+27%; 24%)
Have started a new recycling collection service in the past 12 months (+28%; 17%)

Barriers
See more barriers to change – such as: • lack of time (+42%:10%) • financial, management commitment (+26%; 18%) • risks (+19%; 7%) • infrequent pick-ups (+12%; 1%) • believe it will make them less competitive (+13%; 3%)

10. SME segmentation map of attitudes and behaviours

By combining attitudes and behaviours towards waste minimisation and recycling, a four-cell map is produced that incorporates attitude–behaviour consistency and discrepancy. While a range of attitudes and behaviours could be used to derive the strategy plot, the behaviour regarding undertaking a waste and recycling assessment is crucial because it indicates both a serious intent to focus on the waste and recycling issue as well as organisational interest and support. Undertaking such an assessment activity suggests the issue of waste minimisation and recycling enhancement is on the SME's agenda. The strategy plot that follows simply divides the SME sample on whether they have or have not conducted a waste and recycling audit or assessment.

The attitude towards investing money in waste reduction measures (such as a new recycling system or new piece of recycling equipment) is key to whether an organisation will move beyond the easy-to-do waste minimisation and recycling activities and into the more difficult-to-do space. The preparedness to invest money in this area is a crucial attitudinal variable that differentiates SMEs. Those SMEs that were prepared to invest with a reasonable payback period of two years or less were deemed to have positive attitudes to future waste and recycling improvements and those that either would not invest at all or wanted immediate payback were deemed to have negative attitudes.

Figure 15 illustrates how many SMEs fit in each 'mindset' and suggests how the EPA could start to focus its activities and energy.

Figure 15: Segment profiles of SME attitudes and behaviours

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 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. 19% of SMEs surveyed fall within this category.

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. 13% of SMEs surveyed fall within this category.

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 for not improving waste management practices. These kinds of strategies are likely to get them to focus on change. 46% of SMEs surveyed appear to be disengaged.

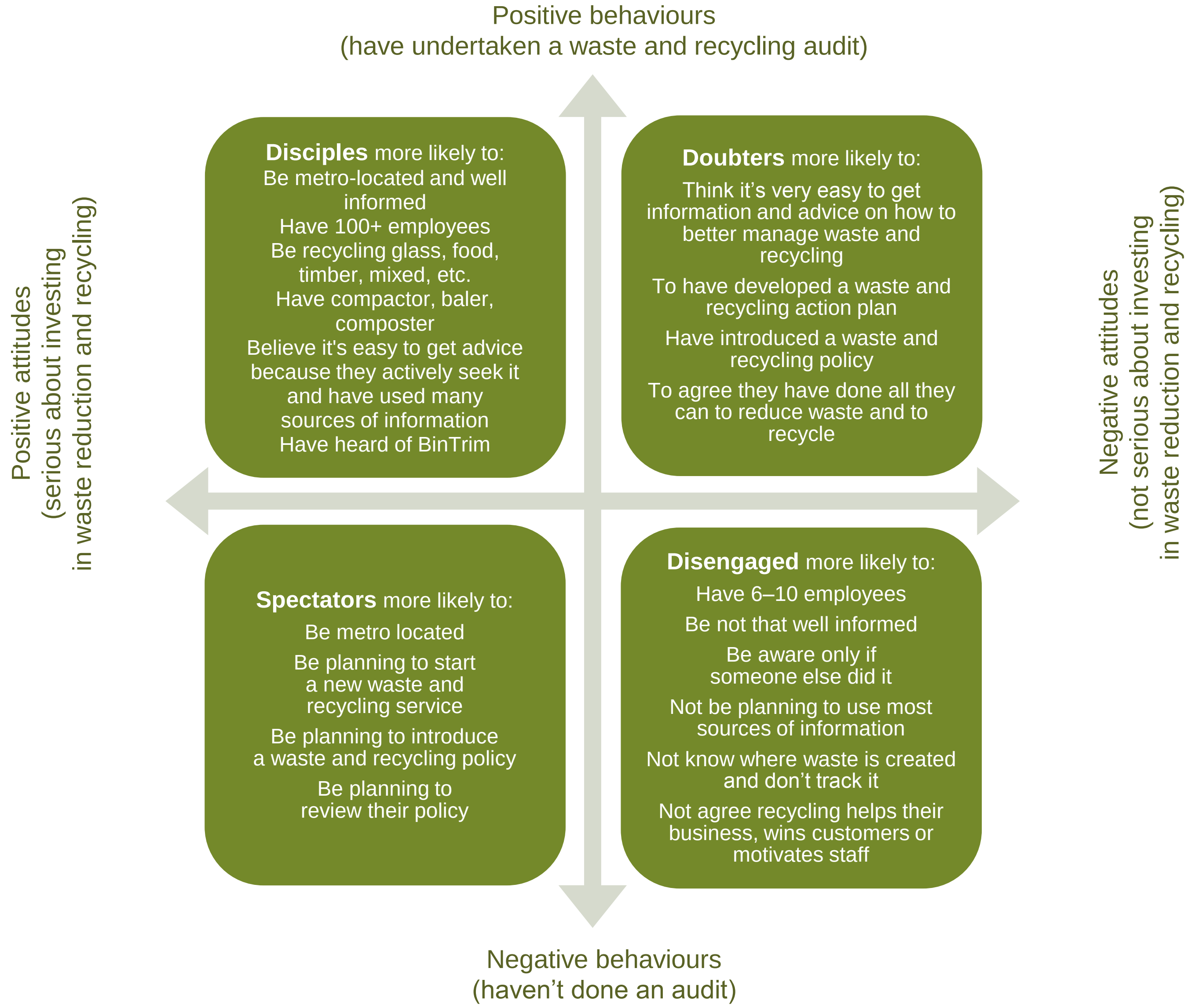
While 46% of SMEs appear to be disengaged in the area of waste reduction and recycling, a total of 41% of SMEs are classed as either disciples or spectators.

There were no significant differences across the different industry sectors.

Figure 16 highlights the differences between the segments and provides more insight into where each segment differs on the variables measured in the survey.

- **Disengaged** tend to be very small SMEs that require much higher levels of intervention to get them to focus on an issue like waste and recycling. They are also the kind of organisations of least interest to WSPs and in many respects are, at present, on their own to find ways to reduce waste and to recycle more. (26% of WSPs stated that 'Not enough materials to warrant a collection service' was a barrier to providing assistance to SMEs).
- **Doubters** simply believe they have done all they can. They need to be shown good arguments as to what else they can do by way of waste minimisation and recycling more.
- **Spectators** are planning to do a lot of things but simply not getting around to it. Making action by these SMEs easier and perhaps providing special incentives to act 'right now' will assist them to get started on waste minimisation and recycling more.
- **Disciples** are larger SME organisations that are better organised and have multiple motivations to improve waste and recycling. They need to be encouraged to continue to find ways to do things even better.

Figure 16: SME segment profiles showing statistically significant skews



11. References

NSW EPA, Instinct and Reason for, 2015 unpublished, *Bin Trim Social Research for Benchmarking and Program Evaluation*

NSW EPA, Wright Corporate Strategy for, 2015 Unpublished, *Bin Trim Program Audit and Review Report Round 1*

12. Appendix 1 – SME Survey

2207 – EPA – Bin Trim Benchmark - SMEs

TELEPHONE SURVEY – 12-15 MINUTES - VERSION FINAL

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 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 9995 5266 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

[RECORD LOCATION]

S1. 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

Section Screeners
[ASK ALL]
Q1. 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]
Q1.1 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]
Q2. 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]
Q3. Which sector does your organisation mainly operate in?

[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 ALL]
Q4. 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 QA1]
Q5. 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 waste	O10
Baler	O11
Compactor	O12
Dehydrator	O13
Composter	O14
Metals	O15
Other ____________________PLS specify	O16

[ASK IF CODE 1, OTHERS GO TO QA1]
Q6. Are you satisfied with these services? *Please choose one only*

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

Section A - INFORMATION AVAILABILITY, AWARENESS AND KNOWLEDGE
[ASK ALL]
QA1. 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	O4	
Fairly well informed	O3	
Not that well informed	O2	
Not at all well informed	O1	
Don’t know	O99	

[ASK ALL]
QA2. 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	O4
Fairly easy	O3
Fairly difficult	O2
Very difficult	O1
Don't know	O99

[ASK IF CODES 3 OR 4 IN QA1; OTHERS GO TO A4]
QA3. 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	O1
Been made aware	O2
Both	O3

[ASK IF CODES 1 OR 2 IN QA1]

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	O1
Not been made aware	O2
Both	O3

[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

[ROTATE CODES READ OUT]	M/R
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)			
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 IF YES ….. IE CODES 3, 4, 5, OR 6 IN Q14]
Q15 do you keep track of: *Please select all that apply*

	Q15
[DO NOT ROTATE – READ OUT]	M/R
Paper	☐1
Cardboard	☐1
Plastic film or soft plastics	☐3
Wood	☐4
Food waste	☐5
Glass	☐6
Hard plastics	☐7
Other Please specify_____________________________	☐9

[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					
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	O1	O2	O3	O4	O5

can to minimise waste and maximise recycling					
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 expense to improve our waste and recycling service	O1	O2	O3	O4	O5
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 QZ1]
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 Z - Demographics

[ASK ALL]

QZ1 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]

QZ2 Have you received a free Bin Trim assessment?

Please choose one only

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

Qz3.1Would you recommend a Bin Trim assessment to other businesses?

	QZ2	QZ3
[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 ALL]
Z4. Sample Source/EPA Grant Recipient
[CODE BY SAMPLE SOURCE SO CAN ANALYSE]

[ASK ALL]
Z5. Please indicate where your organisation's main base of operation is located.

	QZ4	QZ5
	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

Thank you very much for your time today.