





Local Government Association of Queensland Waste Management & Zero Waste Research

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Issue Date: 5th June 2018.



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Background & Methodology.



Our Approach.

⇒ LGAQ on behalf of local government in Queensland has been responding to the proposed introduction of a waste levy by the State Government. LGAQ has publicly supported investment from the levy into waste to energy solutions. This will require a significant investment over a long period and it is important to understand where community attitude sits in relation to the value placed on waste management, willingness and capacity to pay, and support for proposed investments. Research was required to understand the Queensland community attitudes to the proposals of zero waste initiatives.

⇒ To achieve this output both qualitative and quantitative research were conducted. Both components focused on:

- Understanding community attitudes to waste management and their understanding of concepts such as zero waste, waste stream management.
- Understand sensitivities, concerns, priorities and personal relevancy.
- Gauge the expectations on government in terms of waste management
- Understand preferences in terms of government responsibility for management and investment of funds leveraged.
- Establish the level of support for a waste levy and investment responses to support zero waste and the development of markets to support waste stream reuse.

Qualitative Research

- 4 x focus groups: Brisbane, Ipswich, Gladstone, and Cairns.
- 1.5 hours in duration
- Local members of the community
- Monday 28th and Tuesday 29th May 2018

Quantitative Research

- Online survey n=1,036
- 12 minutes
- Regions: South East Queensland and Coastal regions
- 23rd May – 30th May 2018

⇒ This report includes the analysis and findings from both the qualitative and quantitative research.



Quantitative Methodology cont.

- ⇒ Online survey conducted with Q&A panel. Data was post-weighted to reflect the proportion of residents against ABS population statistics.
- ⇒ Fieldwork commenced Wednesday the 23rd of May 2018 and was completed Wednesday 30th of May 2018.
- ⇒ The questionnaire covered approximately 12 minutes of questioning related to environmental perceptions, waste management, zero waste and waste steam management..
- ⇒ Within the online questionnaire and focus group discussion, respondents were asked questions in an unprompted and prompted manner. During the process they were specifically 'educated' with standard blurbs on Zero Waste and Waste Stream Management strategies in order to provide a final, informed opinion as to importance and perceived performance. This process of education also enabled a more informed position for respondents to prioritise initiative's being considered and investment options.

| <i>Final sample achieved</i> | <i>n=1,036</i> |
|------------------------------|----------------|
| SEQ region | 599 |
| Coastal region | 437 |

**Note: some LGAs received sufficient sample to provide indicative insights at a geographic level. These have been included in commentary where statistically significant differences exist as some geographies are particularly affected by localised environmental and waste management issues. Any LGA that appears with an asterisk (*) has less than 50 responses for the community and no LGAs with fewer than 30 responses have been commented upon.*



Zero Waste Description.

**Quantitative results gained after this explanation was provided have this noted along side the question reference*

In recent times there have been significant challenges for the recycling industry across Australia and Queensland, which means that we cannot continue to manage waste and recyclables the way we have in the past.

Not everything can be recycled or reused, and the availability of suitable land for landfill sites is becoming an issue, with a range of alternative activities to managing waste needing to be explored.

Governments are currently considering a range of policies, initiatives, and solutions around waste management with the ultimate goal of becoming zero waste in the future.

Zero waste is based on the concept of minimising and eventually eliminating waste altogether. In this context it is about reducing and eventually eliminating waste going to landfill. State and Local governments play a role in this, and a number of Queensland councils have progressed working towards 'zero waste' futures.

Looking at the current waste management processes it is clear that if these do not change it will cost us both environmentally and financially in the future.

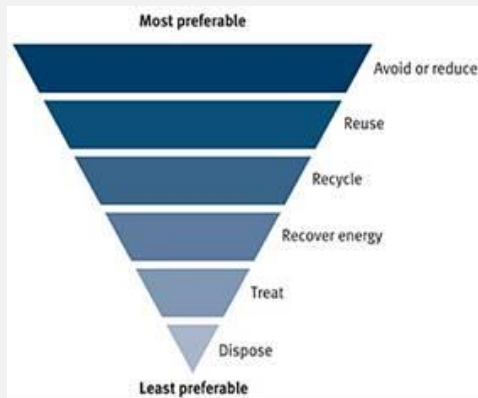


Waste Management Goals Description.

**Quantitative results gained after this explanation was provided have this noted along side the question reference*

Our present 'throw-away' or 'disposable' society mindset will need to be vastly altered if we are to work towards a zero waste future. We must also be prepared to invest in new industries and technologies to waste management if we to ensure a long term sustainable solution.

The following Waste Avoidance Hierarchy diagram and explanation, details how a zero waste future could look to address this growing issue within waste management.



Landfill sites are limited, especially around highly populated areas. The need to minimise waste going to landfill is critical. The aim is to divert waste away from landfill towards some beneficial use. Waste needs to be seen as a useful resource and commodity and as such has a value.

Ideally, and first and foremost, our goal should be to not generate waste at all, including avoidance approaches (e.g. less packaging) is at the top of the waste hierarchy.

As we exhaust diversion options (reuse and recycle goods/products/waste), the remaining waste (that cannot be reused or recycled) will still end up in a landfill – where possibly being treated prior to its dumping (minimising its impact on our environment).

Where we have materials that have a value, these should be recycled and reused, however there is an opportunity to harness the residual waste that has no recycling value and divert away from landfills to generate energy. This is a lost opportunity currently. Not only will less material be going to landfill but more benefit will be realised through a range of alternative waste technologies. Waste to Resource solutions look to harness things such as gas emissions from landfill that can be converted into a resource – e.g. bio-fuels or energy production.

In essence, sending waste to the landfill is the least desirable outcome.



Executive Summary.



Executive Summary.

1. Three quarters (75%) of residents are concerned about Queensland's current environmental situation more broadly. And when we focus in more specifically on Queensland's waste management plan for the long term – we see over three quarters (77%) of residents highlighting concern. This in turn highlights the immediacy of action being taken now – with two thirds (66%) of residents stating that immediate action needs to be taken to make a Zero Waste goal a priority.
2. The majority (83%) of residents support a Zero Waste goal. Even amongst those who are currently unconcerned about Queensland's current environmental situation, we see support (50%).
3. There is a lack of clarity (and divided opinion) as to whether Queensland's current strategy for waste avoidance is successful (44% say it is; 33% uncertain; 33% say it isn't).
4. Residents unto themselves, believe they are doing their part to addressing the issues of waste management. Awareness of Local Council's role in waste management is reasonably clear – yet only 45% believe they are doing enough. The role of State and Federal Government is less clear – and as such just over one quarter perceive they are doing enough to aide the cause.
5. Much of the focus many believe should be on preventative measures first and foremost (e.g. reduction in packaging; promotion of industries that produce reusable goods), yet they also appreciate the role of reactionary measures to reutilise and harness waste products as best we can.
6. Three quarters (75%) of residents support Waste to Energy technology investment and initiatives. Support for a waste levy was more moderate (43%) with a larger proportion of residents (28%) showing a stronger showing of non-support.
7. With no clear investment focus being defined by residents, what became clear from the qualitative sessions was that residents supported action towards the issue at large. And that as long as funds are appropriately invested to tackle the broader issue, then the specific strategies should be left up to government. Importantly 90% of residents believe that funds raised from controls and levies etc must be 100% diverted back into waste management initiatives and programs.



Environmental Sentiment.



Summary – Environmental Sentiment.

1. Three quarters (75%) of residents are concerned about Queensland's current situation. Especially litter pollution (64%), the Great Barrier Reef (63%) and illegal dumping (60%). However, while the majority of residents have concern regarding environmental issues in their daily lives, this is less of a priority for concern compared to health, education and social welfare issues.
2. Differences in sentiment and support are mostly related to age (older age groups are more concerned and also more supportive) and gender (females are more concerned and more supportive) rather than being strongly geographically defined.
3. Over three quarter (77%) of residents are concerned about Queensland's waste management plan for the long term. Only 11% are not at all concerned about long term management. In total, two thirds (66%) consider a Zero Waste focus as an immediate priority where action should be taken immediately.

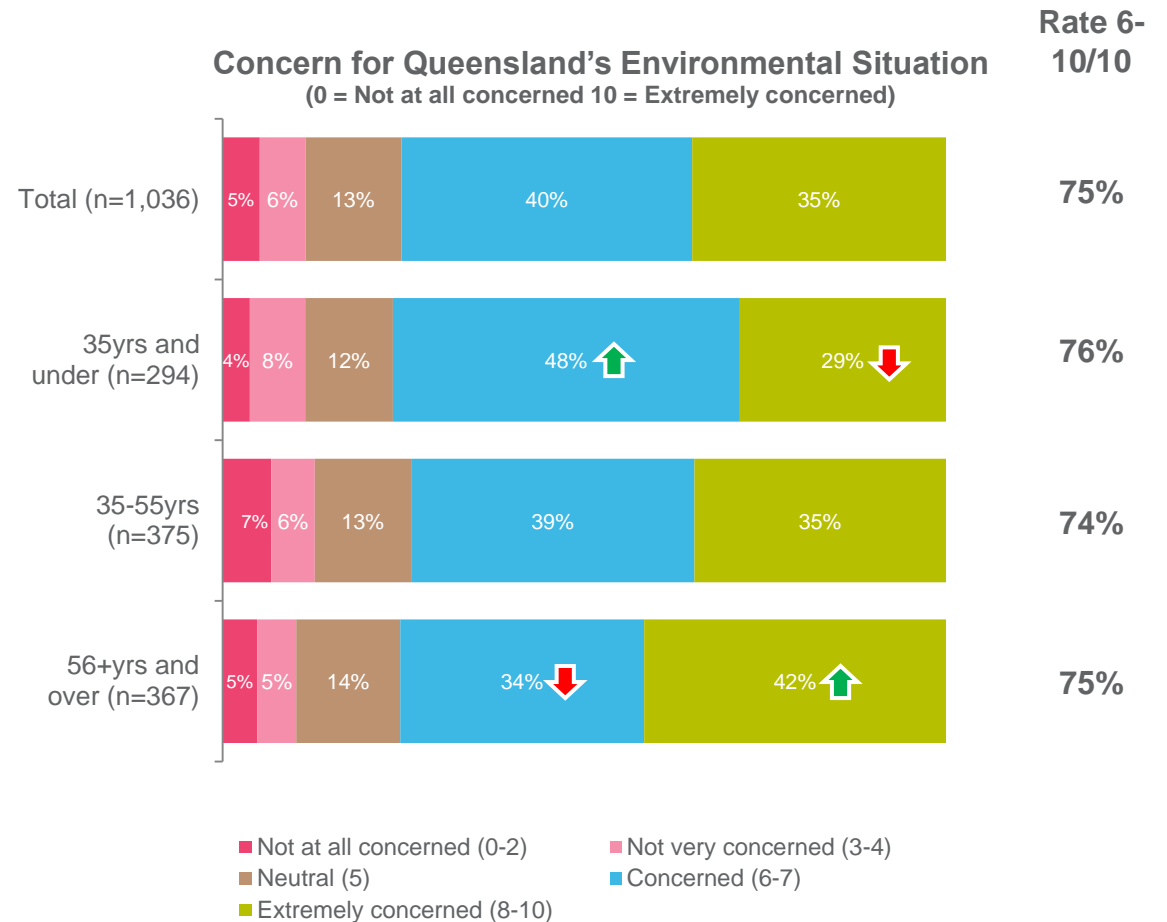


Three quarters are concerned about Queensland's current environmental situation.

Over one third of residents (35%) are extremely concerned. Another two in five (40%) are concerned. Only approximately one in ten (11%) not no concern about the State's environmental situation currently.

While the degree of concern is more pronounced amongst older age groups, this level of overall concern is consistent across all geographic and demographic segments of the community.

Extreme concern (8-10 rating) is noted especially among the 6% of the Queensland population who are affiliated with environmental causes or groups - amongst this group, 65% are extremely concerned.





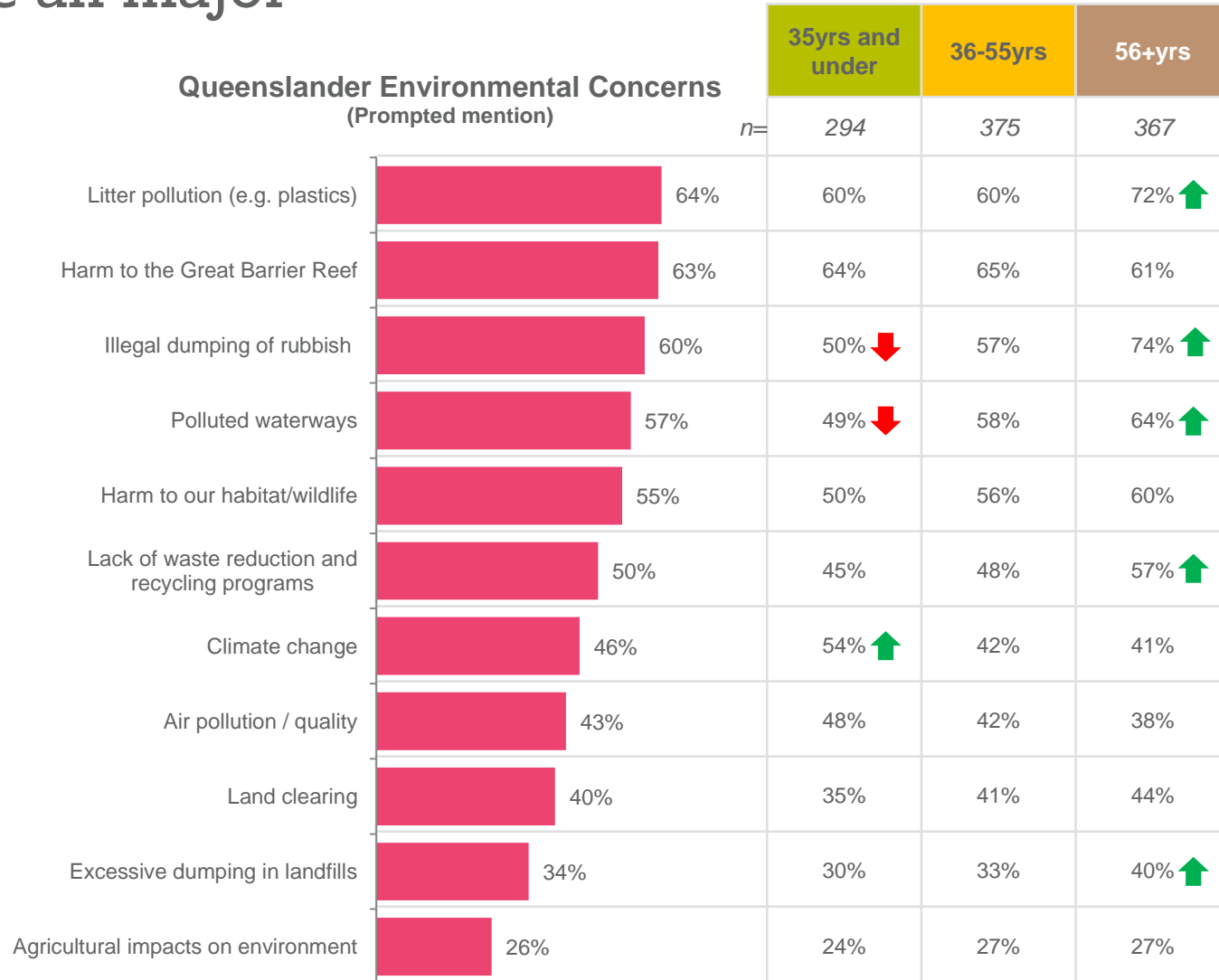
Litter pollution, the Great Barrier Reef, and illegal dumping are all major concerns for residents.

There is more moderate concern from residents for general waterway pollution, wildlife impacts and longer term issues such as lack of waste/recycling initiatives, and climate change.

These issues are prevalent across the Queensland geography with the biggest differences in concern being distinguished by age. Residents **56yrs and over** are significantly more likely to reference a number of environmental impacts. While residents aged **35yrs and under** are significantly less likely to be concerned about illegal dumping and polluted waterways and have a greater emphasis on broader climate change impacts.

Concern about illegal dumping is significantly higher in **Coastal Queensland** (66%) especially in Cairns and Mackay*.

Queenslander Environmental Concerns (Prompted mention)



Q1. Thinking specifically about environmental concerns that may impact upon our way of life in Queensland, what, if anything, concerns you?

*LGA specific results: caution to be taken with small sample sizes at an LGA level. Results indicative only. Base: Total Sample n=1,036; min Mackay n=30.

↑ Significantly higher compared to total
 ↓ Significantly lower compared to total



The environment and waste management focuses are a moderate priority when in context with other issues.

Residents place more emphasis on health and education in particular with respect to their communities.

Environmental and waste management concerns are more moderate priorities in the same general range as transport and infrastructure and local businesses and jobs.

There are differences in priorities according to demographic factors such as age, however environment and waste and recycling tend to be positioned relatively similar in the mid-range. Residents aged **35yrs and under** rate environmental issues significantly higher in priority (although still moderate) and residents aged **56yrs and older** rated waste and recycling significantly higher in priority (although still moderate).

Environment and waste management rank order did not differ significantly across geographies; however, as anticipated other policy items/agenda topics did differ in importance at a community level. At an LGA level, Rockhampton* placed greater emphasis on waste and recycling (4.9), Sunshine Coast* and Cairns both placed greater emphasis on environment (4.9).

Queensland Government Policy Importance to Community
(Rank order 1 = most important 10 = least important)

| | Total | 35yrs and under | 36-55yrs | 56+yrs |
|---|---|---|------------------------------------|---|
| n= | 1,036 | 294 | 375 | 367 |
| Health Services (3.0) | Health Services (3.0) | Health Services (3.3) ↓ | Health Services (3.0) | Health Services (2.8) ↑ |
| Education (4.3) | Education (4.3) | Education (3.8) ↑ | Education (4.5) ↓ | Education (4.6) ↓ |
| Social wellbeing (5.0) | Social wellbeing (5.0) | Social wellbeing (4.9) | Social wellbeing (5.1) | Transport and road infrastructure (4.7) ↑ |
| Transport and road infrastructure (5.2) | Local businesses and jobs (5.0) ↑ | Local businesses and jobs (5.1) ↑ | Social wellbeing (5.0) | |
| Local businesses and jobs (5.3) | Environmental (5.1) ↑ | Transport and road infrastructure (5.3) | Waste and recycling (5.4) ↑ | |
| Environmental (5.4) | Transport and road infrastructure (5.7) ↓ | Environmental (5.6) ↓ | Environmental (5.4) | |
| Waste and recycling (5.7) | Waste and recycling (5.8) | Waste and recycling (5.9) ↓ | Road safety (5.9) ↑ | |
| Road safety (6.0) | Road safety (6.3) ↓ | Road safety (6.0) | Local businesses and jobs (5.9) ↓ | |
| Trade and industry (7.0) | Trade and industry (7.1) | Trade and industry (6.7) ↑ | Trade and industry (7.2) ↓ | |
| Innovation (8.0) | Innovation (8.0) | Innovation (7.8) ↑ | Innovation (8.2) ↓ | |

↑ Significantly higher compared to total
↓ Significantly lower compared to total



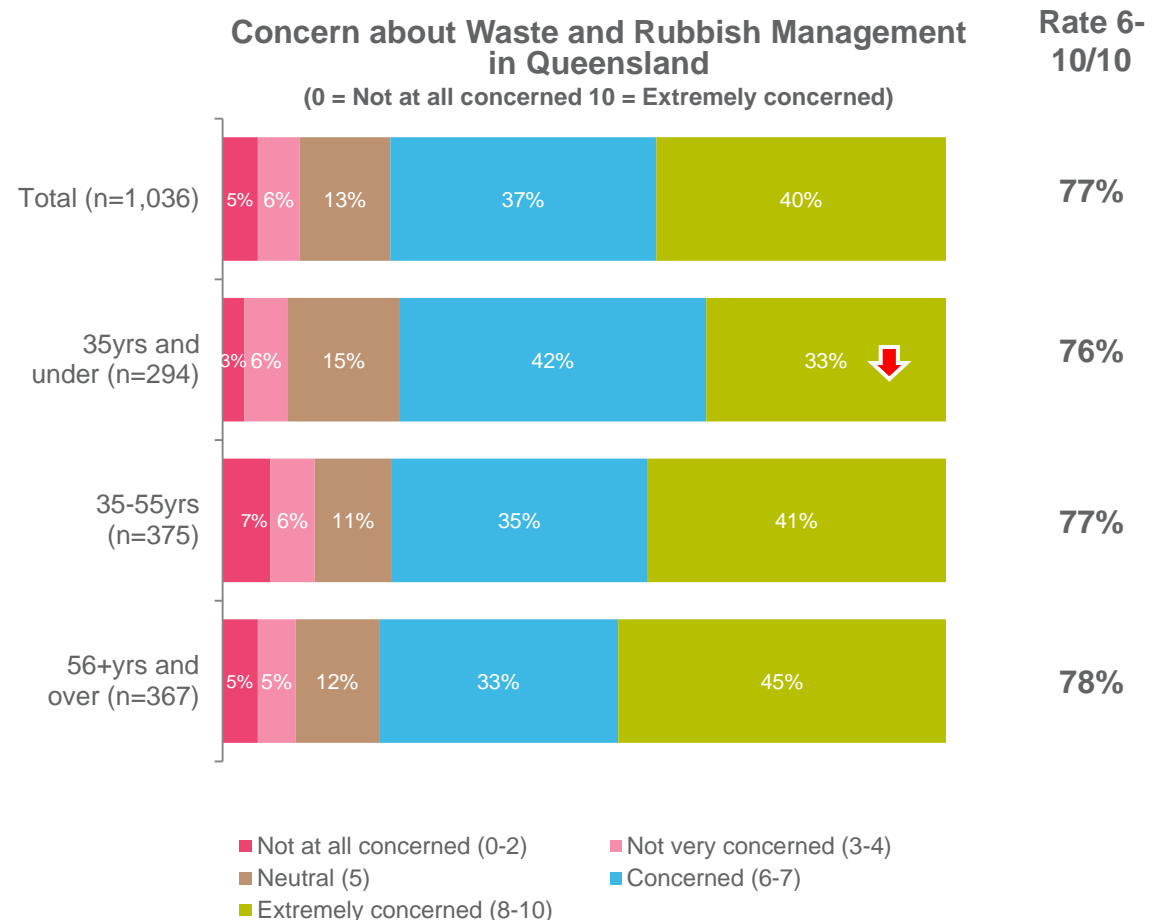
Over three quarters are concerned about waste and rubbish management in Queensland.

Meanwhile approximately one in ten are not at all concerned. Another 13% are in neutral territory.

This level of concern exists across all residents demographically and geographically.

Concern is more pronounced in the Sunshine Coast* (88% rate 6-10) and among those who are **affiliated with an environmental group** (89%).

Waste management relates to the policies and processes put in place to effectively handle and dispose of our communities waste – from household waste to commercial and construction waste – this relates to everything we throw out that could end in landfills or recycled or reused in some manner.



Q3a (See lead in introduction box) On a scale of 0 to 10 where 0 is not at all concerned and 10 is extremely concerned where do you see your level of concern when it comes to the way waste and rubbish is managed in Queensland for the long term?

*LGA specific results: caution to be taken with small sample sizes at an LGA level. Results indicative only. Base: Total Sample n=1,036; min Sunshine Coast n=48

↑ Significantly higher compared to total

↓ Significantly lower compared to total



The topics that are top of mind feeding this concern are the utility of recycling and reduction of landfill.

Among the 77% of residents who are concerned about current waste management there were a large array of specific concerns driving that level of concern. Only 7% of those who were concerned did not provide relevant commentary as to why.

The predominant focus is that recycling/reuse/repurposing could be increased and that less needs to go into landfill. In addition, many simply believe that more needs to be done generally.

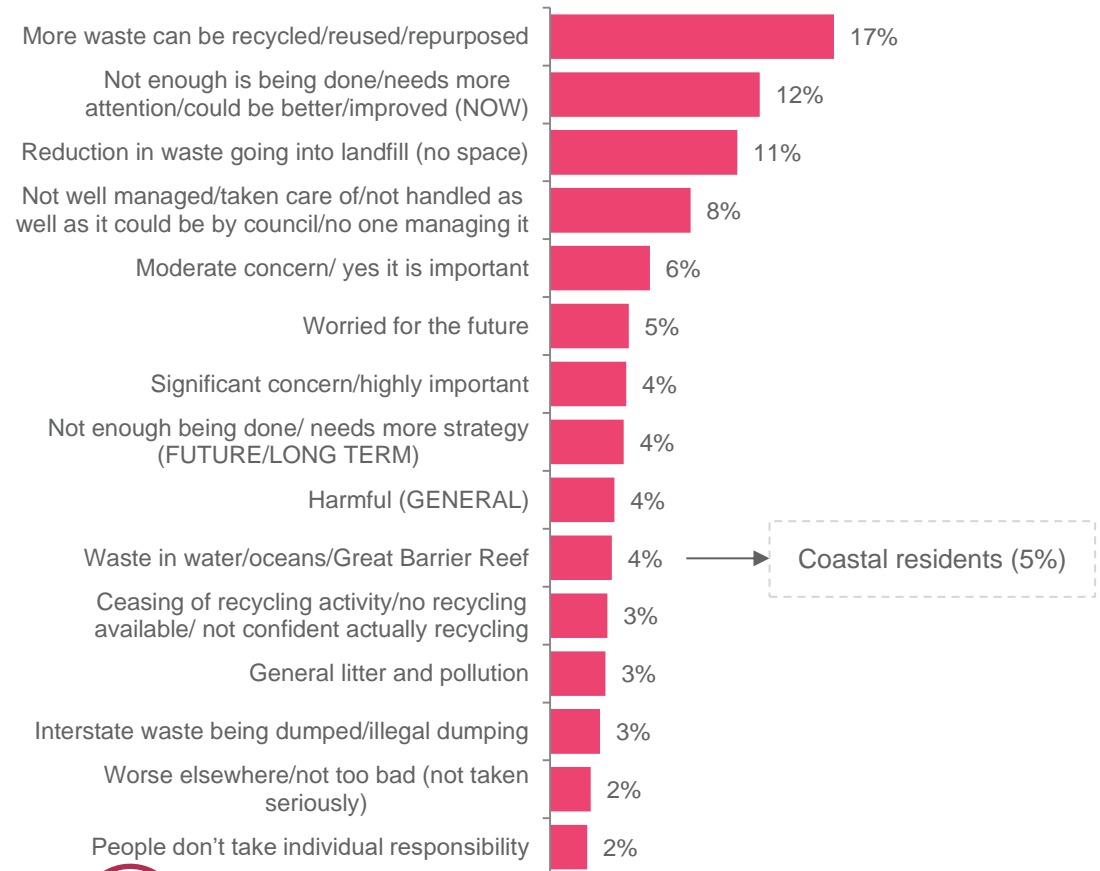


“Recycling is under utilised and more of it should be done.”
“There is no plan to establish any recycling facilities. Most waste goes to landfill.”
“We need to recycle more. We live in a throw away world.”



“Because it seems as though QLD is trying to improve but hasn’t yet fulfilled their goals.”
“Might be too late to do anything, and we’re not really doing enough as it is.”

Top 15 Reasons for Concern over Waste Management in Queensland (Rate 6-10/10)



“The recent change in recycling being dumped straight in to landfill. We need local strategies.”

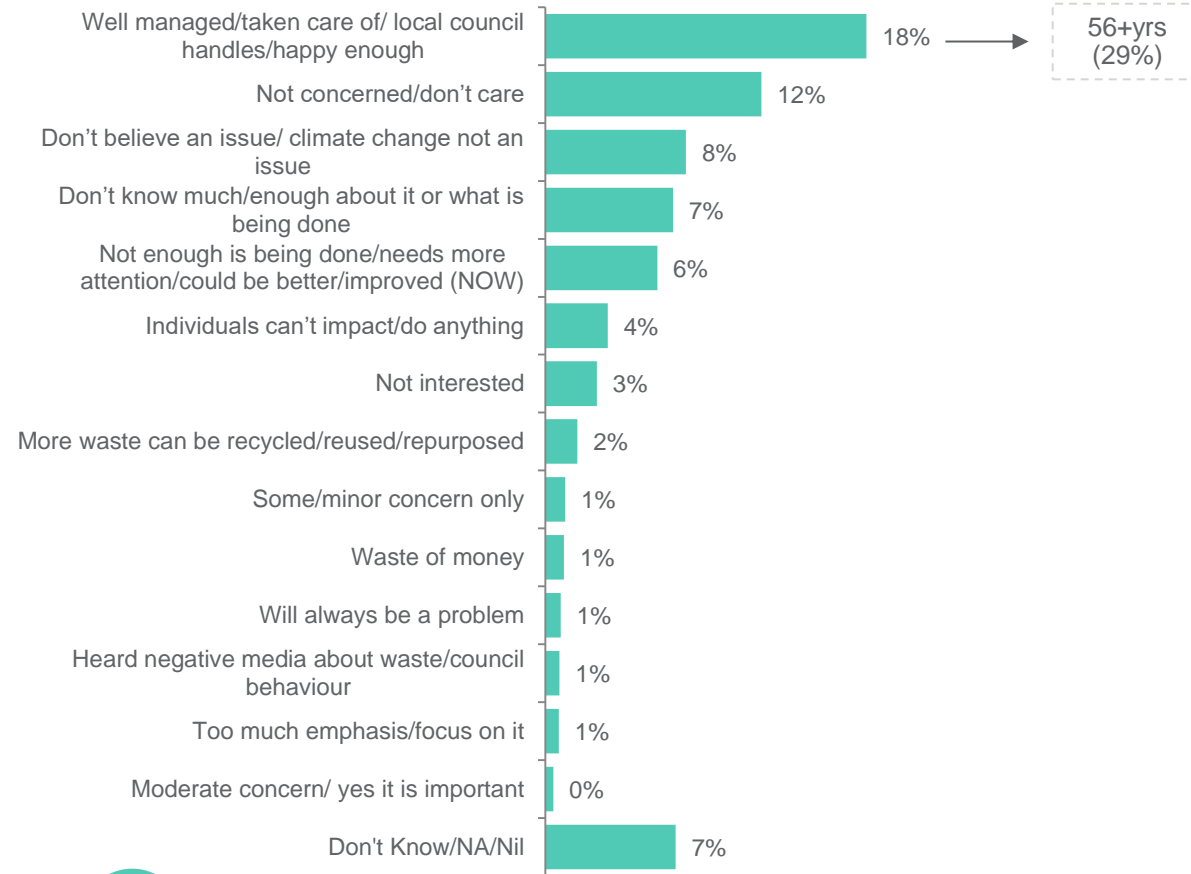


Lack of concern is driven by perceptions of adequate management or ambivalence towards the situation.

Among the 23% of residents who are not overly concerned about waste management in Queensland the primary reason is a perception that it is being adequately managed.

There is also a reasonable proportion of these residents who do not perceive it to be an issue of concern.

Top 15 Reasons for Low Concern over Waste Management in Queensland (Rate 0-5/10)



“I believe our council has an excellent waste management program.”
 “Not really concerned, the council provides ways to make use of rubbish disposal.”
 “My council provides 2 bins for each residence; 1 for general waste and the other for recyclables.”

“Because I don't see much to give me more concerns.”
 “It's not the biggest concern in my life, but I am conscious that the decisions made now will impact on the world for generations to come.”

“This entire environmental "issue" is just another religion - out to lead the sheep and steal their money!”
 “I have no problems and see no problems.”



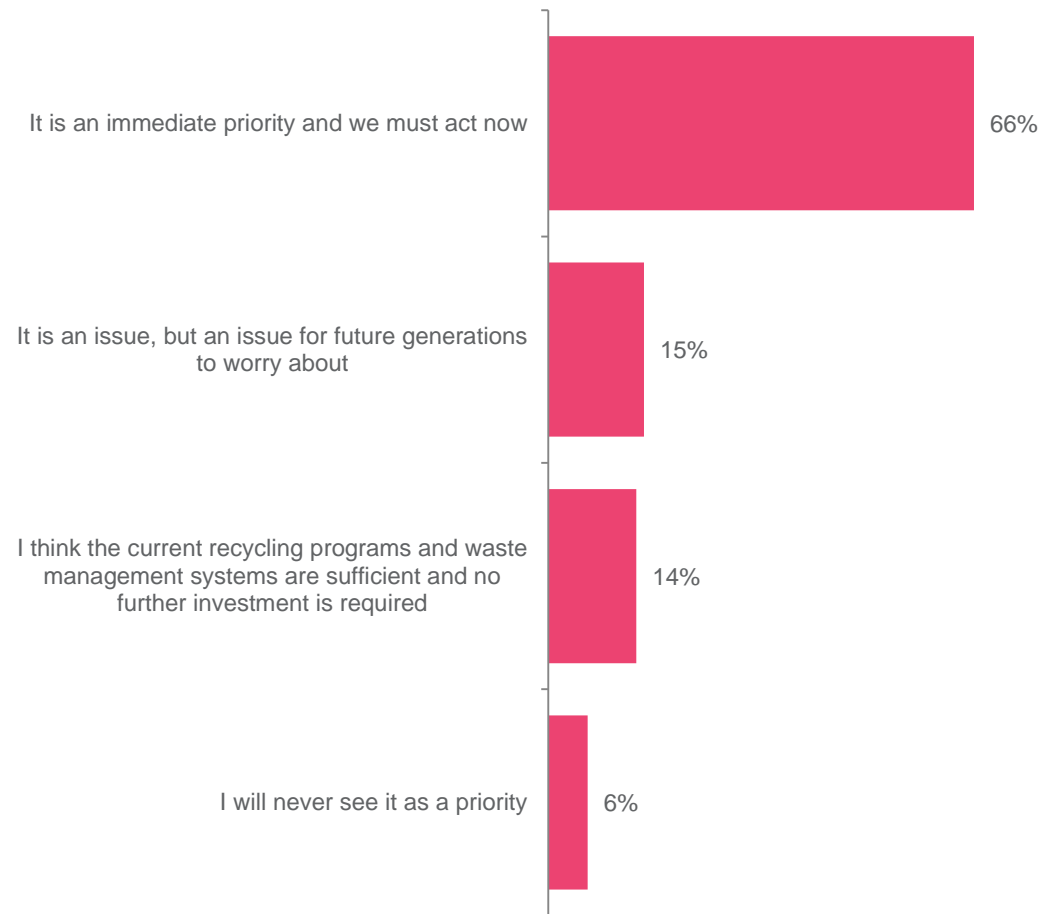
Two thirds consider a Zero Waste future a priority.

One in five (21%) residents would not be supportive of Queensland further focusing on initiatives that strive for a Zero Waste future.

These sentiments are largely consistent across residential groups demographically and geographically. **Males** are significantly less likely than females to indicate it is an immediate priority (60% c.f. 70%).

This level of personal view on Zero Waste was measured at the end of the survey after substantial education on Zero Waste and Waste Stream Management. However, Colmar Brunton considers that this level of prioritisation is not over-inflated. It roughly corresponds to metrics measured on levels of environmental concern early in the survey. In addition, the qualitative focus groups also support the view that residents genuinely consider it to be an important element for the sustainability of Queensland communities.

Personal Views on Queensland focusing on Zero Waste Future





Concern for future generations is slightly more of an influencing factor.

Two thirds of residents' key driving concern is the negative impact on future generations and over half are concerned about current environmental suffering. This concern is again relatively constant across varying demographics and geographic areas. Residents aged **35yrs and under** are significantly more likely to emphasis the natural environment suffering (62%) but are just as likely to also mention future generations (69%).

Even among those who are generally unconcerned about Queensland's current environmental situation (rate 0-4/10 concern level), 46% state that a key concern for them is the long term negative impact for future generations.

Key Driving Concern regarding Prioritising a Zero Waste future

55% **Our natural environment is suffering**

“Because the pollution in parts of QLD are not good and it's affecting the Great Barrier Reef ... if it's affecting the Reef what else is it affecting.”

“Pollution of oceans by plastic is a long term problem that is increasing and not going away.”

“I hate seeing litter, cleared trees, polluted water.”

“I believe that nature should be protected.”

“Environmental issues are very critical in Queensland especially the impact to the Great Barrier Reef.”

66% **A long term negative impact for our children and future generations**

“I'm scared if we don't do something to change it now that there wont be a future for my children.”

“If we don't stop all these issues the earth will be uninhabitable for humans.”

“I want to protect our environment for our children.”

“Worried about the long term impact on the environment and how my children will be affected in the future.”

“Because if we don't look after the land, our children and the next generation are not going to be able to enjoy what we do today.”



Community
Support for
Zero Waste.



Summary – Community Support for Zero Waste.

1. The majority of residents (83%) support a Zero Waste goal. Even among residents who are currently unconcerned about Queensland's environmental situation, 50% see the importance of a Zero Waste goal.
2. Opinions are divided on Queensland's current strategy and its delivery of waste avoidance. Forty-four percent (44%) perceive current strategies to be successful to deliver this goal; while one third (33%) perceive current strategies to be unsuccessful.
3. Residents are conscious that the community and government have to both work towards a waste avoidance goal in order to be sustainable.



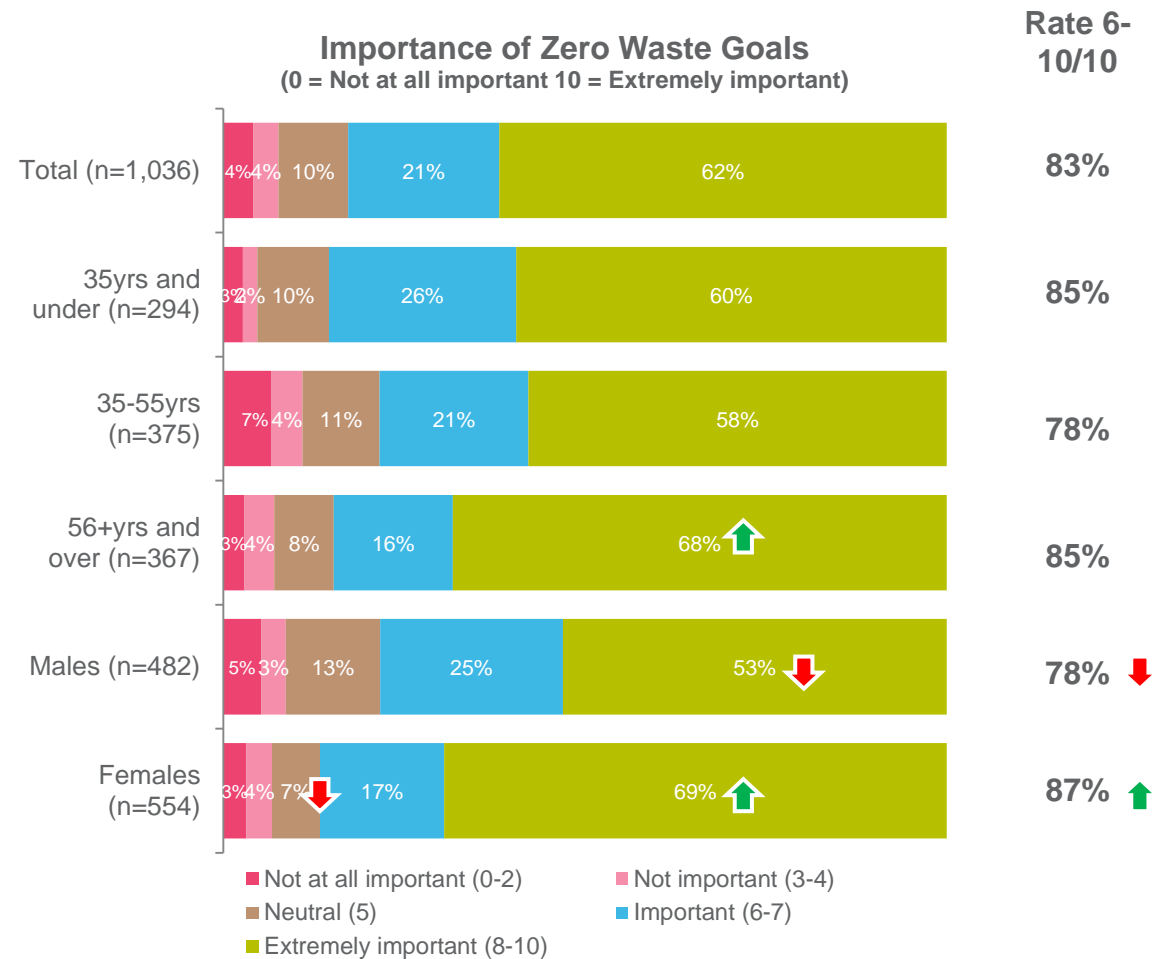
The majority of residents believe the goal of Zero Waste is important.

Almost two thirds (62%) of residents believe the goal of Zero Waste to be extremely important. A further fifth believe it is important.

Only 8% of residents surveyed believe a Zero Waste goal is unimportant.

Residents aged **56yrs and over** and **female** residents are significantly more likely to have a stronger level of importance regarding Zero Waste. While in contrast, **males** are less likely to be so strong in their perceptions of importance and also fall into a more neutral category.

Among residents who are generally unconcerned about Queensland's current environmental situation (rate 0-4/10 concern level), 50% of them believe a Zero Waste goal to be important.





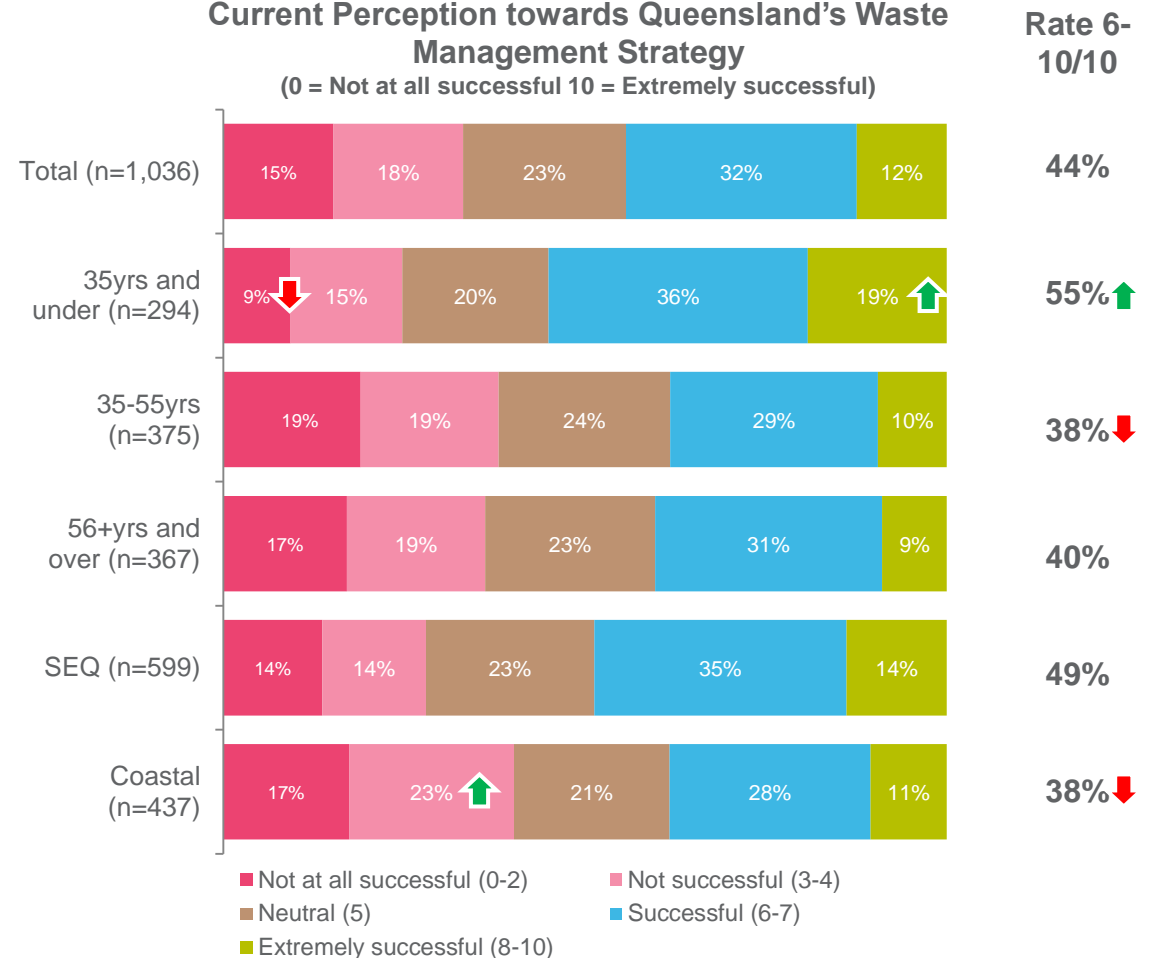
Opinions are divided as to whether Queensland's current strategy is going to achieve waste avoidance.

Forty-four percent of residents surveyed perceive Queensland's current strategy to be in alignment to meeting the goal of waste avoidance. One third believe the current strategy will not be successful in doing so.

Residents in **Coastal** regions are more pessimistic about the success of the current strategy with slightly more (41%) perceiving it to not be successful. Townsville residents surveyed are especially pessimistic with 50% indicating the current strategy will be unsuccessful. Brisbane residents surveyed were significantly more optimistic on current strategy with 53% perceiving it will be successful in achieving this goal.

Residents aged between **35-55yrs** are also more pessimistic.

Current Perception towards Queensland's Waste Management Strategy
(0 = Not at all successful 10 = Extremely successful)



Q8a. On a scale of 0 to 10 where 0 is not at all successful and 10 is extremely successfully, how well do you feel Queensland's current strategy to waste management is meeting this goal of waste avoidance (as described)? Base: Total Sample n=1,036; min Townsville n=89

*LGA specific results: caution to be taken with small sample sizes at an LGA level. Results indicative only.
** Education on Zero Waste and Waste Stream Management has occurred

↑ Significantly higher compared to total

↓ Significantly lower compared to total

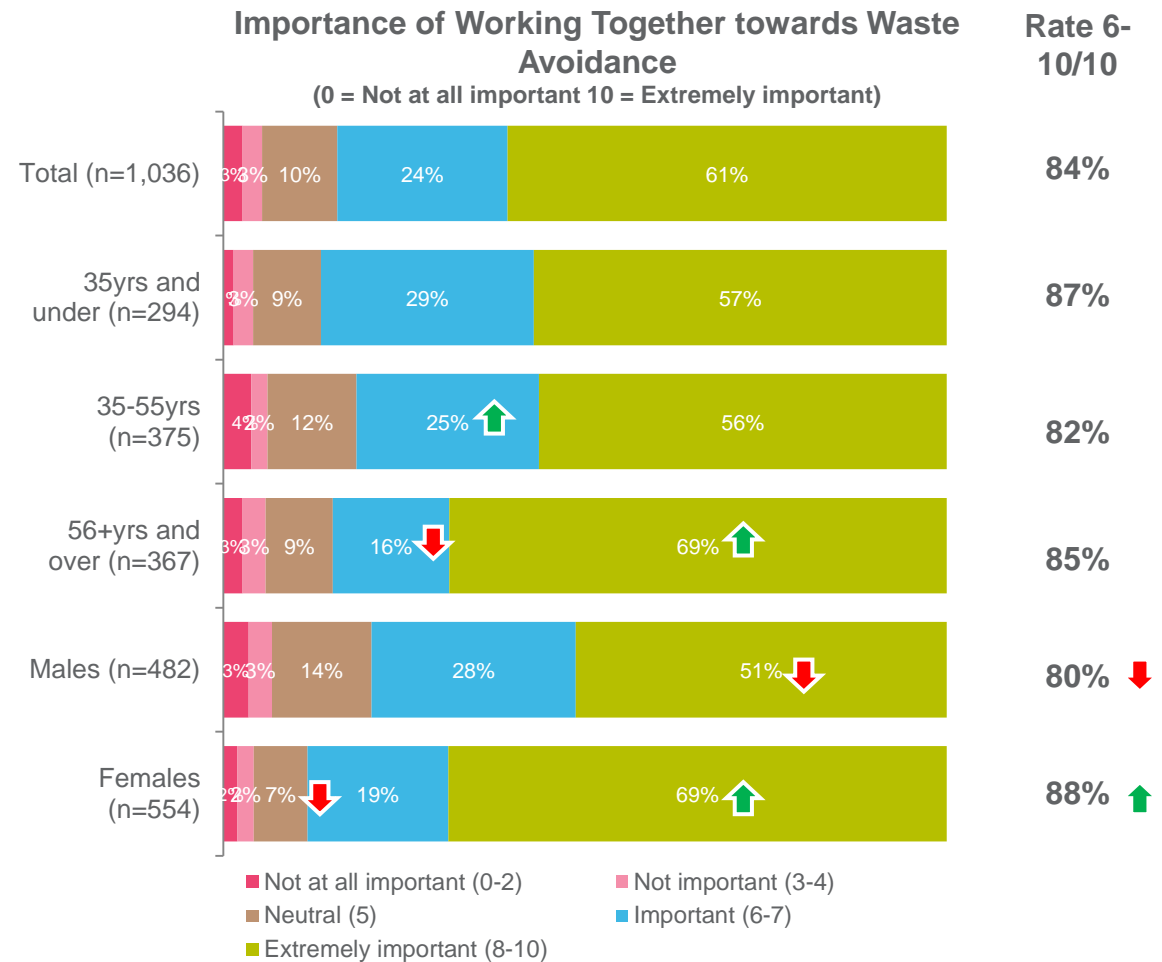


The majority believe that government and community need to work towards waste avoidance.

Eighty-four percent of residents surveyed place importance on government and community both working to achieve a waste avoidance goal. Only 5% perceive this not to be important.

Males are less extreme in the level of importance placed on this; however, overall the majority (80%) still consider it to be important.

Among residents who are generally unconcerned about Queensland's current environmental situation (rate 0-4/10 concern level), 58% of them believe that all parties need to work towards a waste avoidance goal.





Role of Government.



Summary – Role of Government.

1. There is a reasonable understanding the Local Council has responsibility for household rubbish collection (94%) and a perception that Local Council also has responsibilities for other components including landfill sites, recycling, as well as encouraging community behaviour. Forty-five percent (45%) of residents believe that Local Councils are doing enough to combat and meet the continuing issues of waste management.
2. Understanding of the roles of State and Federal governments are less clear. Residents perceive State Government to be more involved in most components of waste management and community behaviour (excluding household rubbish collection). While the perception is Federal Government are more focused on community behaviour change and enforcement of legal obligations. However, it is apparent that residents for the most part simply do not know. As such, just over one quarter of residents perceive these levels of government to be doing enough to achieve waste management goals.
3. Although Local Council is clearly seen to have responsibility for implementation and operation, residents consider that State and Federal Governments should have responsibility for managing and directing funds towards waste management activities.
4. Individuals themselves perceive that they are doing enough to contribute to meeting the continuing issues of waste management. This is a long standing perception among households that there is not too much more they can do to tackle such a large issue. Individual's level of concern is also closely related to how much they perceive government to be doing. Those who are currently unconcerned about Queensland's environmental situation are significantly more likely to believe all levels of government are doing enough to achieve waste management goals.

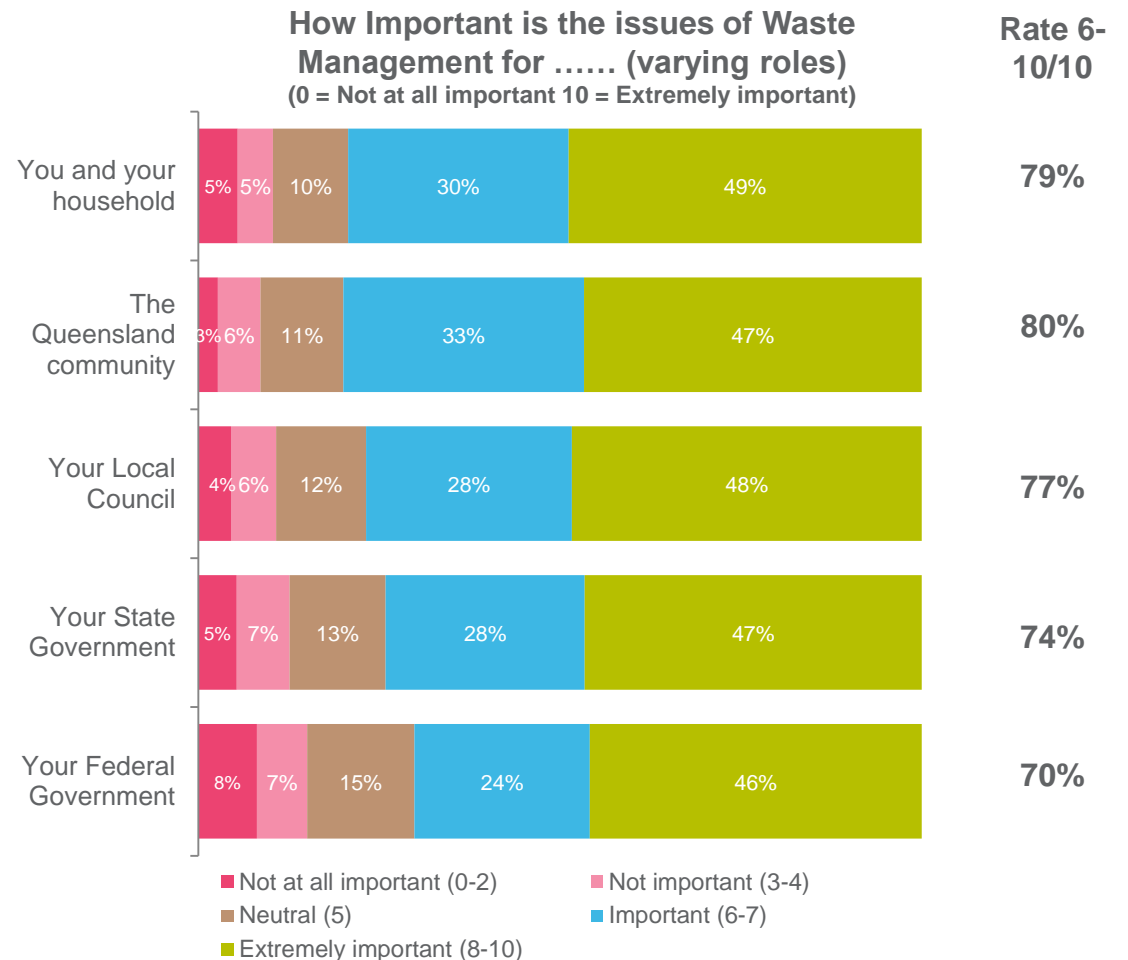


The issues of waste management is perceived to be of concern to all.

Residents surveyed place importance on the issue of waste management especially regarding them and their households, the Queensland community and for Local Councils. While they also perceive that State and Federal governments consider waste management important this sentiment eased slightly.

Older residents aged **56yrs and over** and **female** residents are significantly more likely to place greater importance on the issue for all parties.

SEQ residents are significantly more likely to believe the issue is important for their local council (81%) compared to residents in **Coastal** regions (71%). LGA areas where residents rate the level of importance for local council as less important are Logan*, Rockhampton*, Sunshine Coast*, Townsville and Mackay*. Although results for LGA should be treated indicatively.





While residents clearly see rubbish collection as a Council responsibility; responsibility for other waste management components are less clearly designated.

Local Council is perceived to have a clear responsibility for rubbish collection, landfill sites, recycling as well as encouraging community behaviour.

State Government is perceived to have a role in all areas of waste management except for household rubbish collection at a local area.

Federal Government is mostly perceived to have some role and responsibility in community behaviour change and enforcement of legal obligations. However, are not widely considered to have a role in operational components.

SEQ residents surveyed are significantly more likely to consider the State Government to have responsibility for landfill sites (51% c.f. 38% among Coastal residents).

Coastal residents place responsibility for this with their Local Council.

Waste Management Responsibility & Roles

| | Local | State | Federal | Private Enterprise |
|--|-------|-------|---------|--------------------|
| Household rubbish collection | 94% | 9% | 5% | 8% |
| Landfill sites | 67% | 46% | 11% | 8% |
| Recycling programs/ efforts | 62% | 58% | 31% | 19% |
| Pushing for better waste and recycling behaviours | 57% | 64% | 46% | 19% |
| Enforcing legal and social obligations to waste management and recycling | 51% | 61% | 54% | 13% |

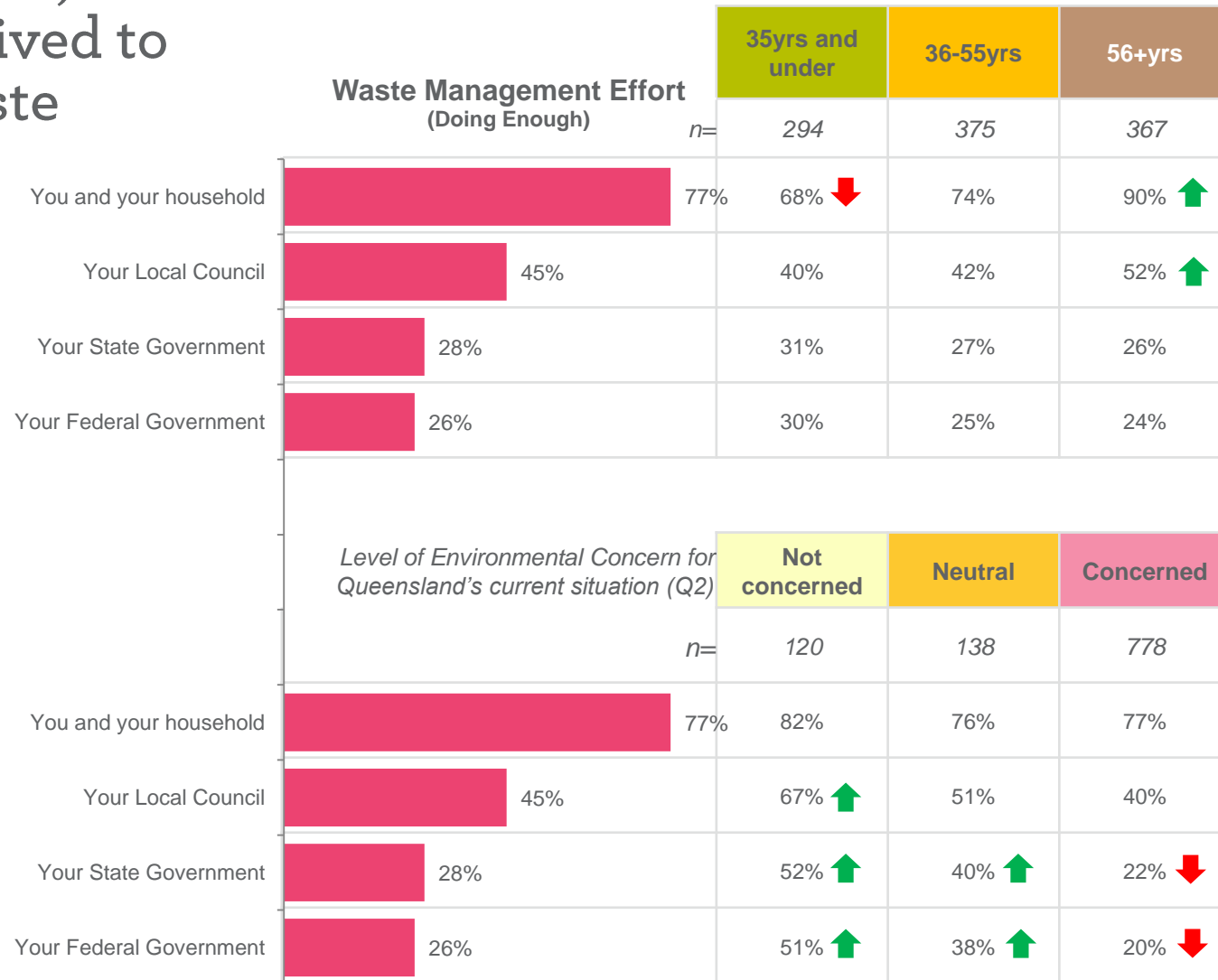


Of all levels of government, Local Councils are perceived to be more active in the waste management effort.

Over three quarters (77%) of residents believe they are doing enough at an individual and household level to combat waste management issues. This is significantly more so in older age groups **56yrs and over**. This personal belief of 'I'm doing all I can' in the waste and environmental sectors is a long standing perception among individuals.

Less than half (45%) of residents surveyed believe that their Local Council is doing enough. This is higher than efforts recognised from the State and Federal Governments.

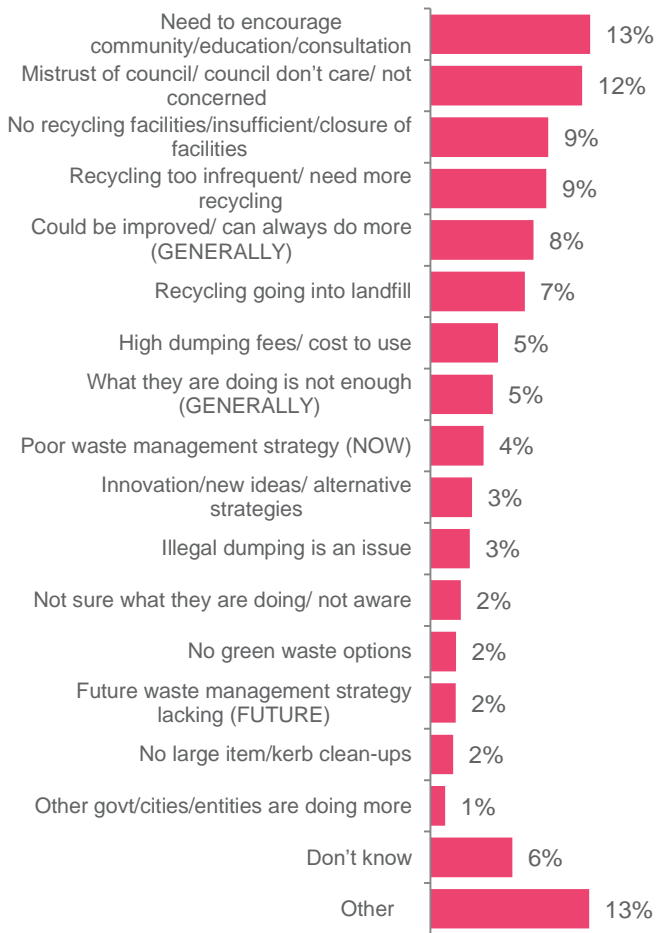
There is also a clear relationship between personal level of concern on environmental issues and perceptions that others (especially government) are more active and doing enough in this space.



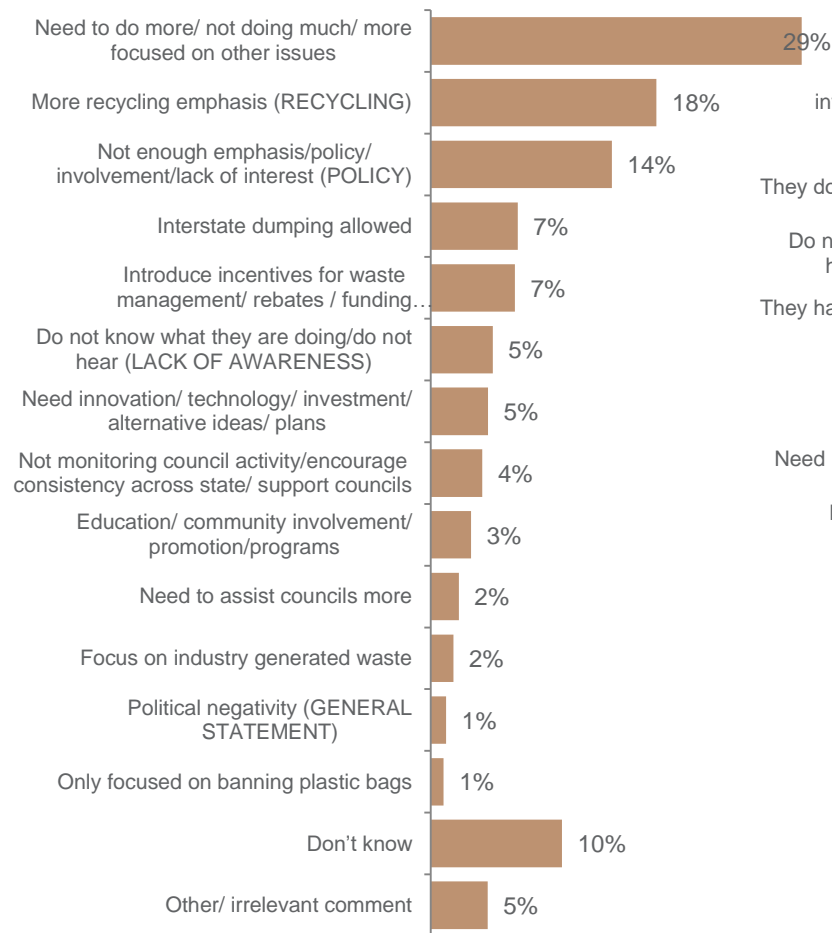


There is a general lack of visibility of exact actions undertaken by government. Residential focus remains on recycling.

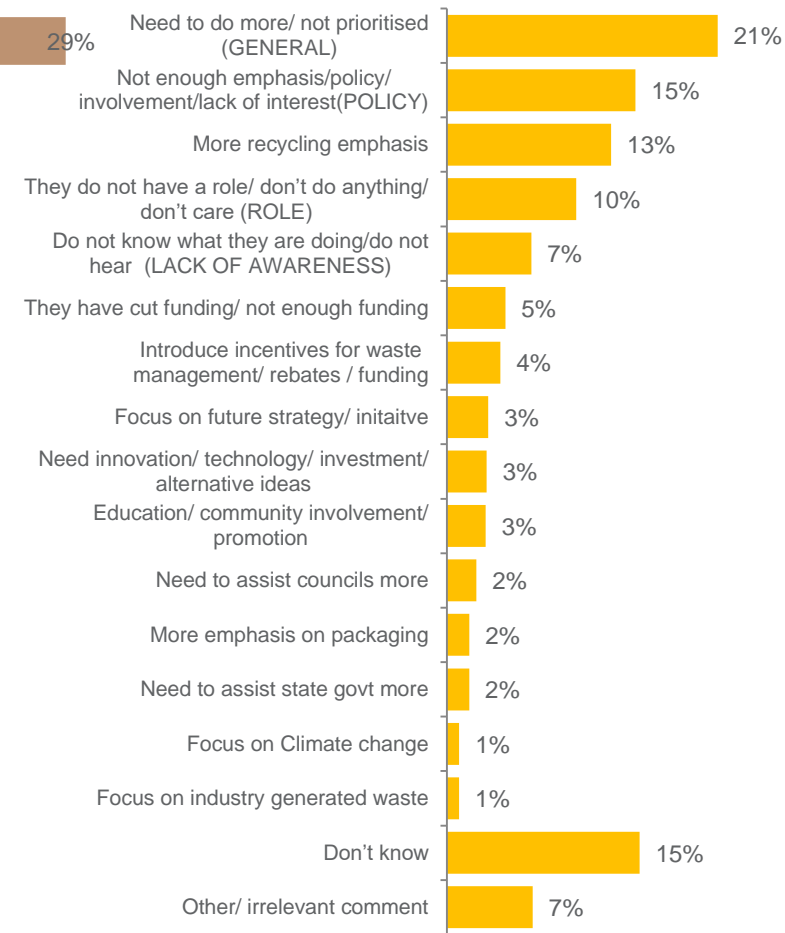
55% think Local Council not doing enough



72% think State Government not doing enough



74% think Federal Government not doing enough

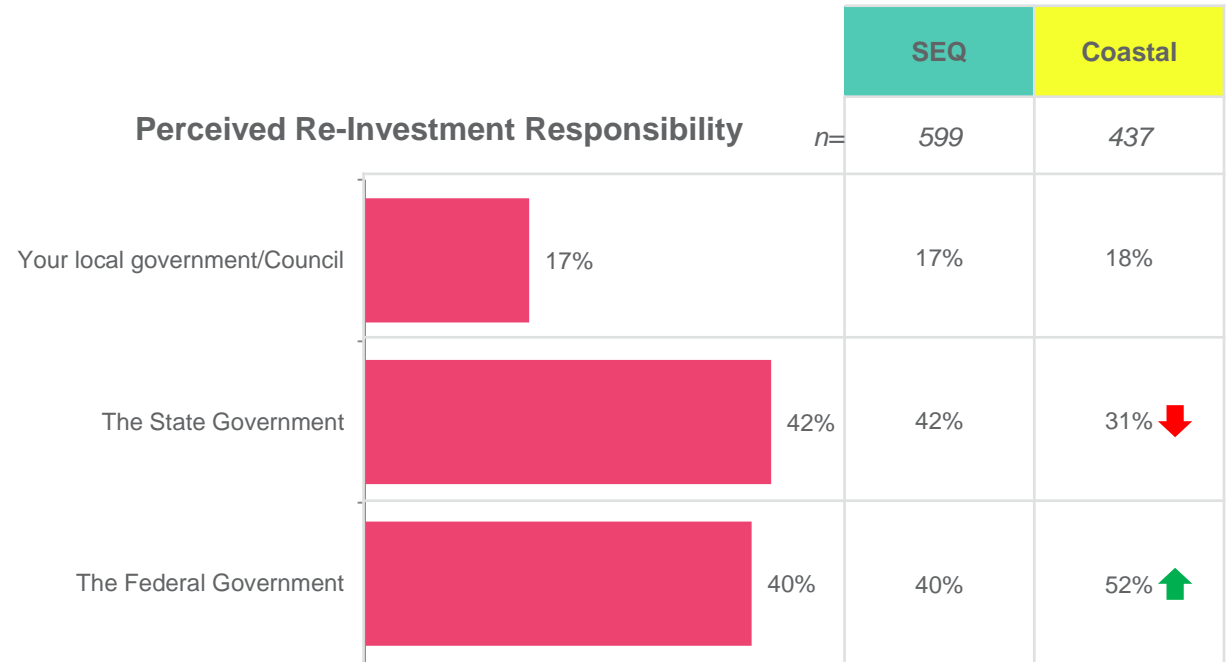




Residents believe the management and investment responsibilities for waste reduction strategies sit outside of local government entities.

Although residents surveyed understand the scale of the role and responsibilities of Local Council on issues of waste management, only 17% perceive that local government should be responsible for the management and investment of funds derived from a waste reduction strategy.

Residents in **Coastal regions** are significantly more likely to place emphasis on Federal Government responsibility over State and Local governments.





Waste Levy, Initiatives & Investment.



Summary – Waste Levy, Initiatives and Investment.

1. Residents are generally supportive of most activities, initiatives and investment options proposed by this research to combat waste management and strive towards a Zero Waste future.
 - Higher levels of importance are placed on promotion of industries that produce re-usable goods, improved processes for recyclables, expansion of recycling capabilities outside of residences, kerbside collections, reduction in packaging, consistency in approaches and greater investment in recycling initiatives (all received 88%-89% ratings of importance).
 - Three quarters (75%) of residents support Waste to Energy technology investment and initiatives (even while acknowledging that taxes would need to be diverted towards this). Only 4% of residents do not support WtE technology initiatives.
 - While 43% of residents support a waste levy, it is one of the least favoured types of initiatives among those presented for consideration. This is due to 28% not supporting its introduction. If implemented, the expectation is that industry and government will bear the cost of a waste levy.
2. There are no strong preferences as to whether investment is made towards overall strategies, recycling, or technology and innovation. Indeed the qualitative research indicates that as long as funds are appropriately invested to tackle the issue at large, then the strategy should be left to the government. Importantly 90% of residents believe that funds raised from controls and levies must be 100% diverted back into waste management initiatives and programs.
3. Approximately two thirds (64%) of residents are open to individuals financially contributing to achieving a Zero Waste future. However, 20% of residents are not open to financial support.

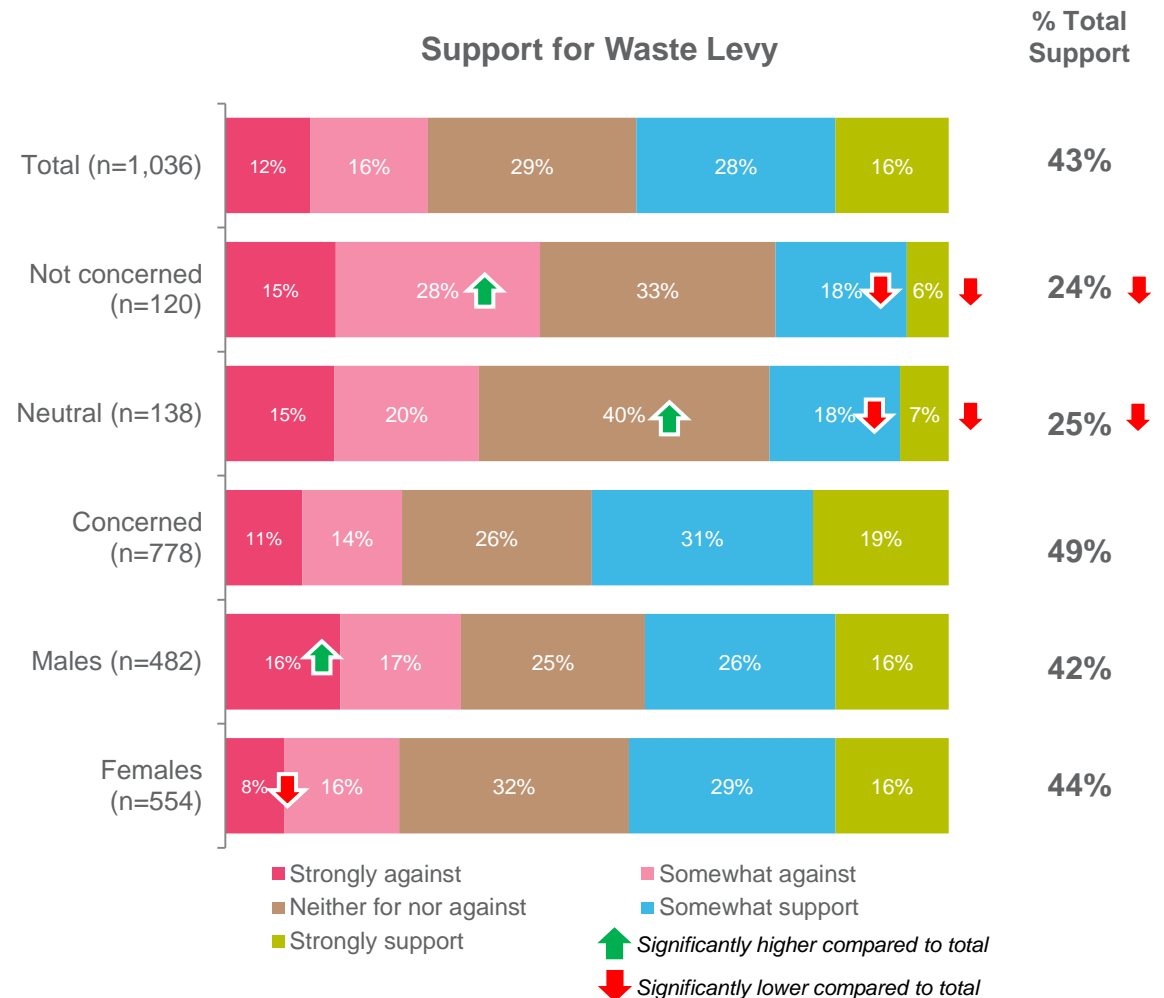


Support for a waste levy is divided.

Forty-three percent of residents surveyed support a waste levy for Queensland. Just over a quarter (28%) are unsupportive and a similar proportion (29%) are neutral towards the proposal.

There are very few differences demographically or by geography. There is a more substantial proportion of **males** who are strongly against such a proposal compared to females.

There is a strong relationship between support levels for a waste levy and level of concern about the current environmental situation in Queensland. Those residents who are not concerned about the current situation are typically either unsupportive or neutral towards a waste levy.





Residents want government and industry to bear the cost of a waste levy.

As anticipated, residents are not keen to be the main contributor to a waste level despite 43% of them being supportive of a waste levy. Most perceive that either government or industry should bear the cost.

Perceived financial responsibility shifts depending upon the individual's general support of a waste levy and priority towards the environment. Residents who are not supportive of a waste levy place financial responsibility predominantly on government. While those who are supportive of a waste levy are more inclined to want industry to be the primary contributor but also more cognisant that individual households may bear the cost (although this is still minimal at 12%).

Waste Levy Financial Responsibility
(Prompted and unprompted* codes)

| | | Level of support for waste levy (Q8c) | | | |
|---------------------------|-----|---------------------------------------|---------|------------|-----|
| | | Not supportive | Neither | Supportive | |
| | | n= | 296 | 290 | 450 |
| Government | 43% | 59% | 45% | 31% | |
| Industry | 39% | 26% | 37% | 48% | |
| Households | 9% | 5% | 8% | 12% | |
| All parties (*unprompted) | 4% | 2% | 3% | 5% | |
| User pays (*unprompted) | 2% | 1% | 1% | 3% | |
| Other response | 1% | 2% | 1% | 0% | |
| Not sure/NA | 3% | 5% | 4% | 1% | |



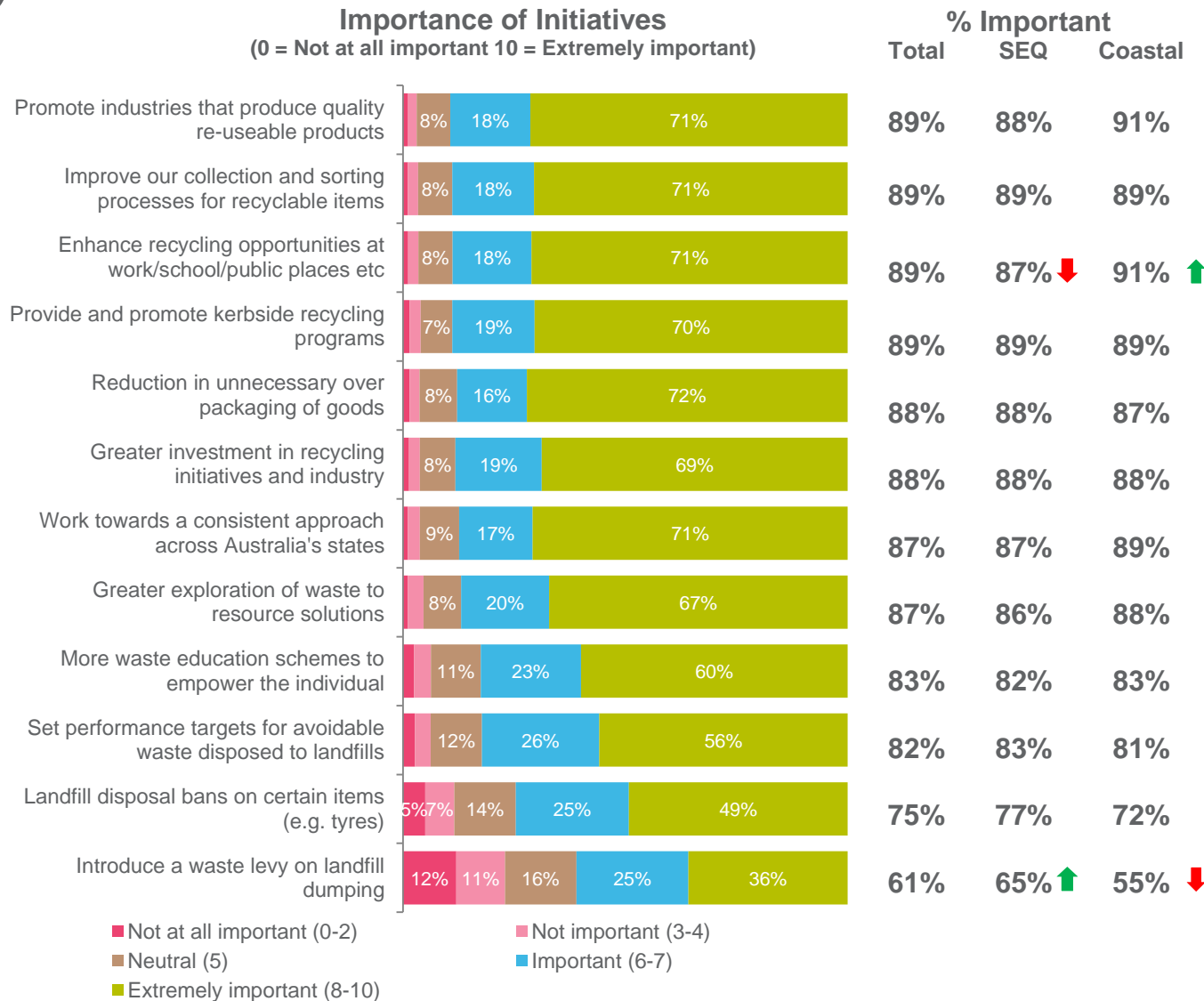
Most initiatives are palatable to residents, with waste levy and landfill disposal bans considered least important.

The broader focus is on preventative causes as apposed to 'managed' issues.

The majority of residents consider many of the potential initiatives important for Queensland's waste management strategy. Higher levels of importance are placed on promotion of industries that produce re-usable goods, improved processes for recyclables, expansion of recycling capability outside of households, kerbside collections, reduction in packaging, consistency in approaches and greater investment in recycling initiatives.

SEQ residents surveyed place a higher degree of importance on the introduction of a waste levy. However, across all geographies this initiative was least focused on by residents.

Females, residents aged **56yrs and over** and those who express concern for the Queensland environmental system consistently rated the importance of all initiatives presented as significantly higher than their counterparts.



Q9. There are a range of options governments may consider in the development of a new overarching waste strategy for Queensland in the future. On a scale of 0 to 10 how important to do you feel these potential initiatives will be? Base: Total Sample n=1,036 SEQ n=599 Coastal n=437
 ** Education on Zero Waste and Waste Stream Management has occurred

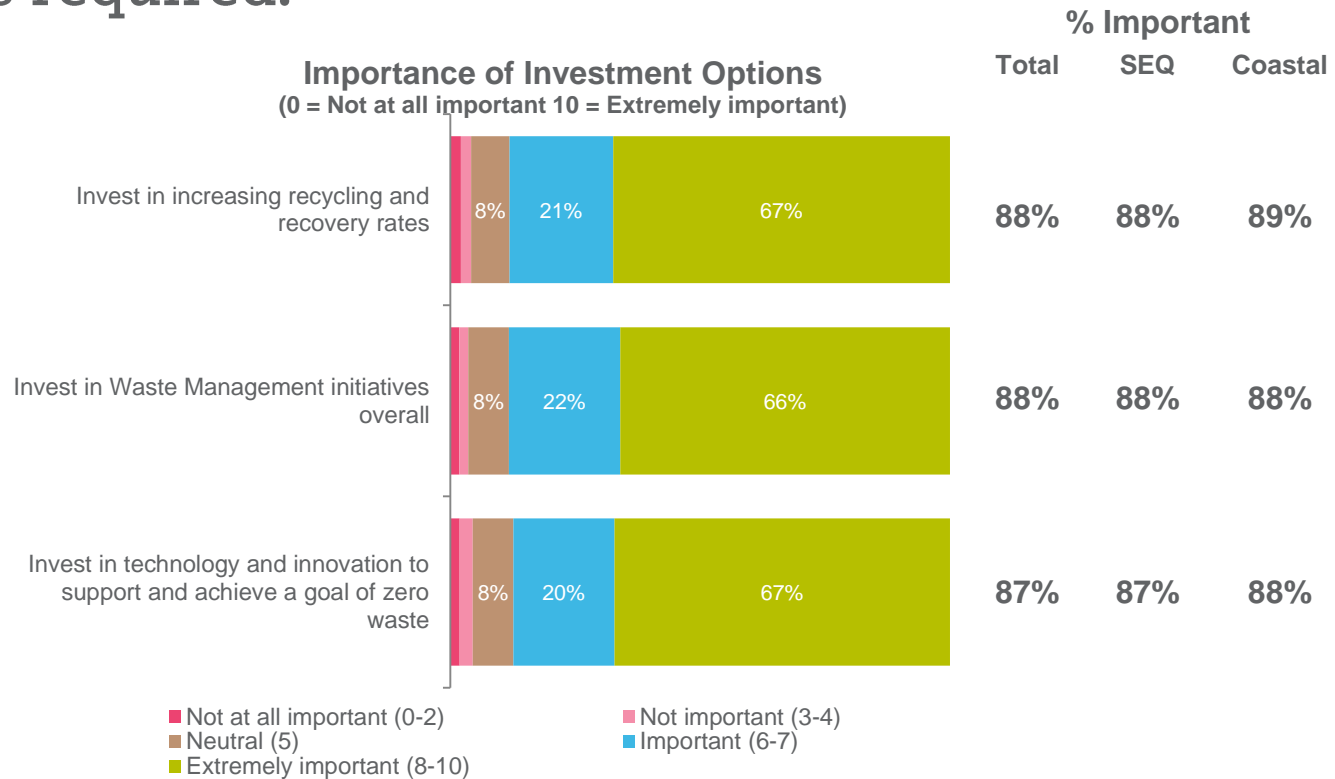
↑ Significantly higher compared to total
↓ Significantly lower compared to total



The majority believe it is important to make any type of investment in waste management – highlighting that action is required.

There are no strong preferences as to whether investment is made towards overall strategies, recycling or technology and innovation. Indeed the qualitative research indicates that as long as funds are appropriately invested to tackle the issue then the strategy should be left to the government.

Females, residents aged **56yrs and over** and those who express concern for the Queensland environmental system consistently rate the importance of all investment alternatives presented as significantly higher than their counterparts.



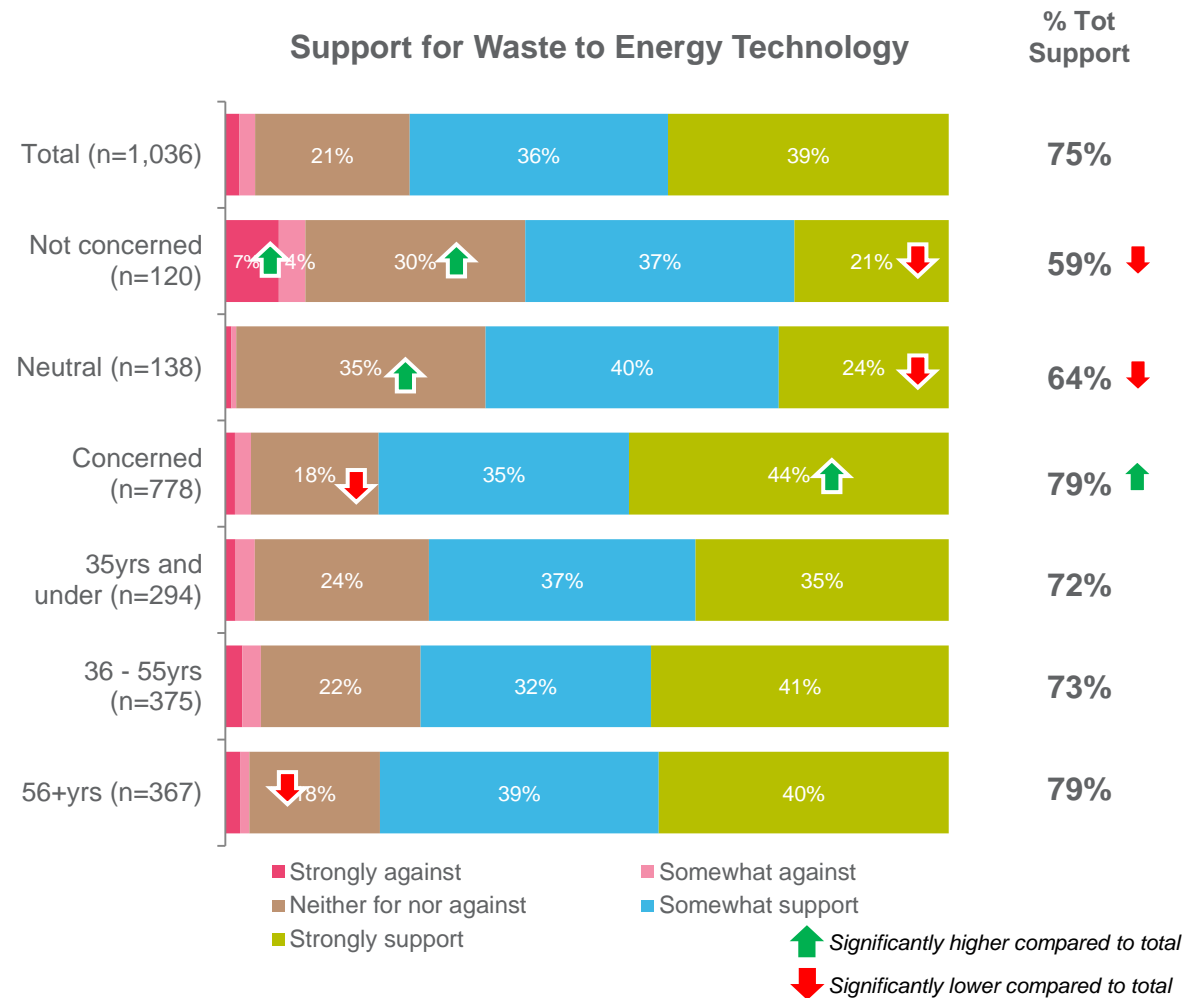


Three quarters support Waste to Energy technology investment and initiatives.

There is only 4% of residents against investment in Waste to Energy technology (WtE).

Neither younger residents nor males (both groups who throughout the research are generally more moderate in their support) showed significant differences in their level of support for WtE.

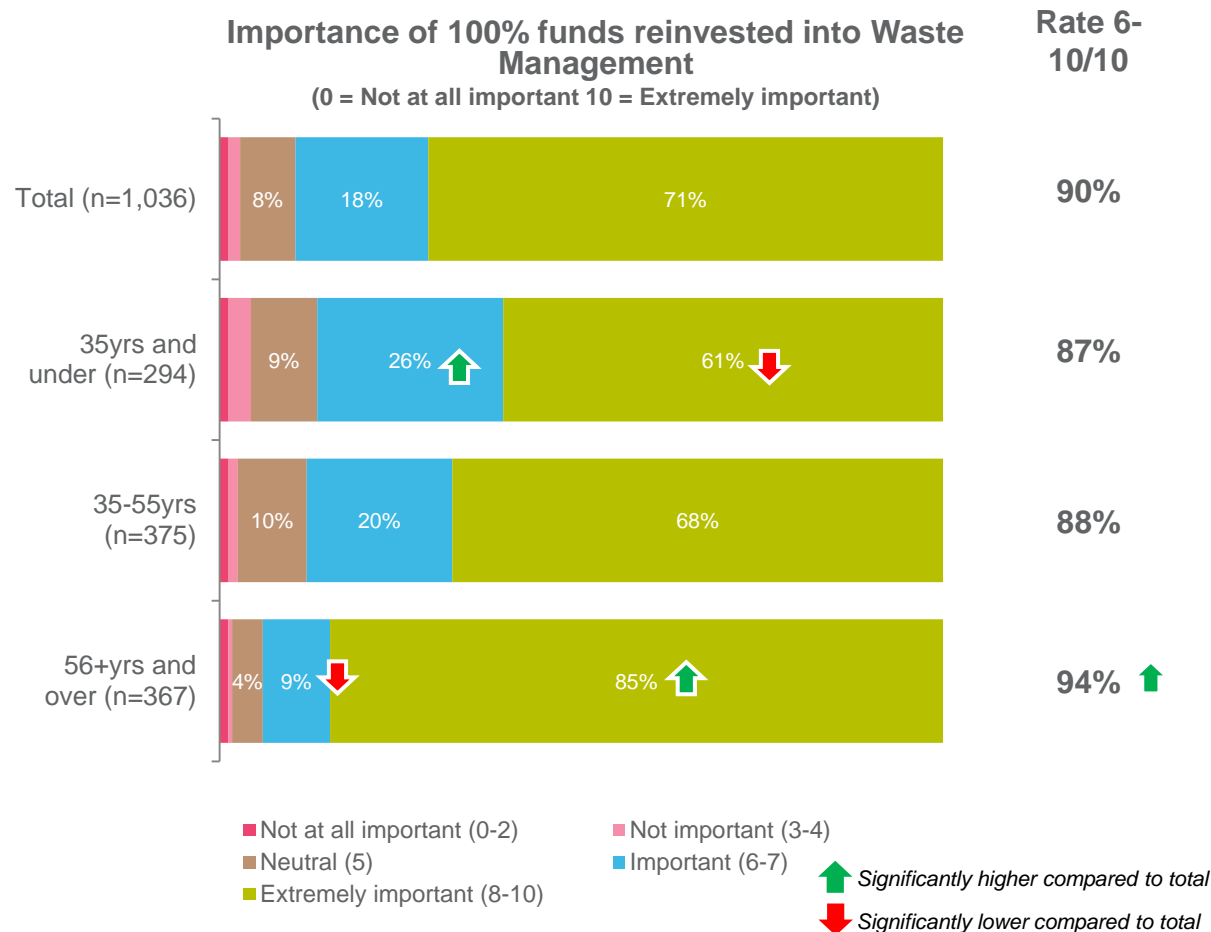
Residents who are currently not concerned about Queensland's environmental situation are less likely to support WtE. Approximately one in ten are against such an investment; however over half (59%) of this unconcerned group would still support WtE initiatives.





Nine in ten residents consider it important that funds generated are reinvested into waste management directly.

This is especially so among residents aged **56yrs and over** (94%). However, all demographics and geographic regions have a similar high level of importance placed on dedicated reinvestment of funds.



Q11b. On a scale of 0 to 10 where 0 is not at all important and 10 is extremely important, how important is it that the funds derived/collected from more stringent controls and levies are 100% dedicated to waste management and not redirected back into general government revenue streams (to be used to fund other)? Base: Total Sample n=1,036

** Education on Zero Waste and Waste Stream Management has occurred

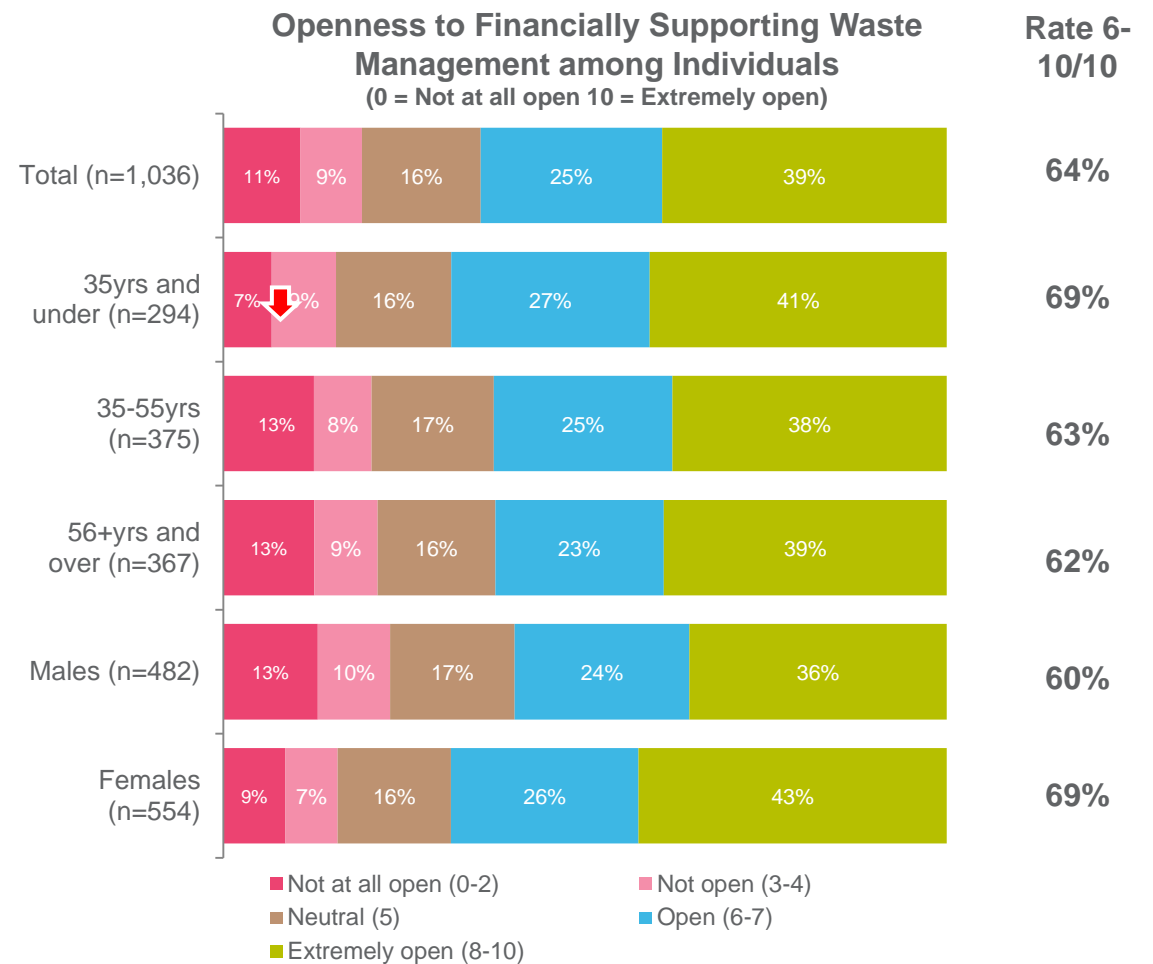


Approximately two thirds of residents are open to supporting funding to reach a Zero Waste future.

One in five residents are not open to individuals supporting funding of initiatives.

Although not statistically significant, it is the younger residential base aged **35yrs and under** who are more open to supporting funding (*note: the mean score is statistically significant on this metric*). **Females** are also more open to providing financial support.

Retired residents, those on **welfare**, and **stay at home parents** are all less likely to be open to supporting funding of waste management initiatives (62%, 51% and 59% respectively).



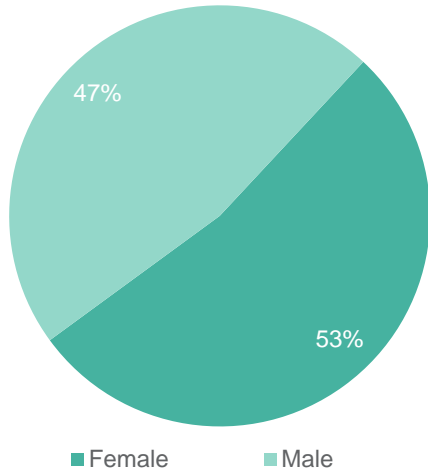


Sample Profile.



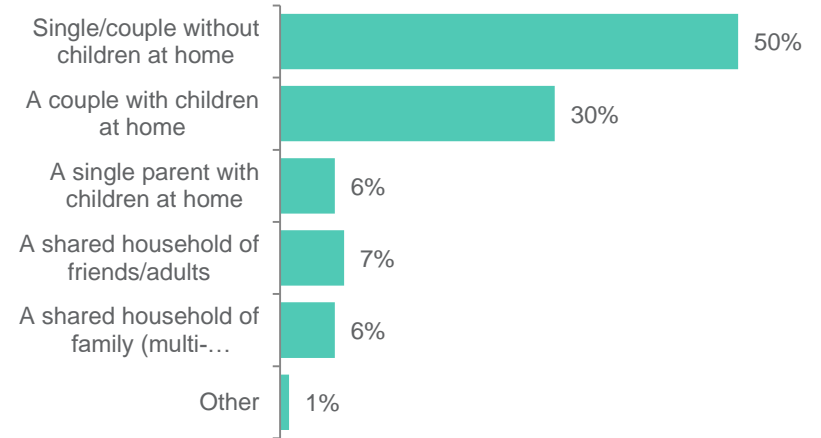
Gender

Total Respondents (n=1,036)



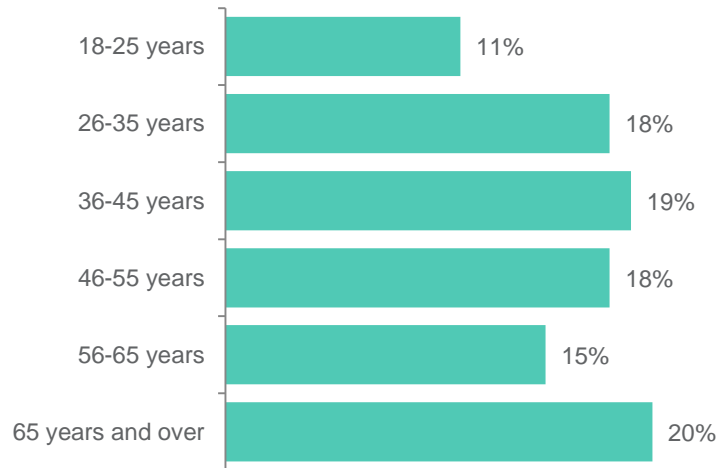
Household Status

Total Respondents (n=1,036)



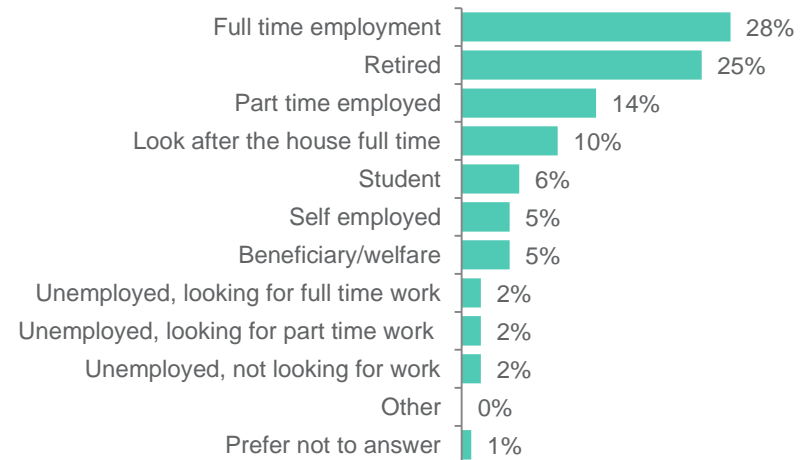
Age

Total Respondents (n=1,036)



Employment

Total Respondents (n=1,036)



UNWEIGHTED DATA PRESENTED (weighting protocol utilises region, age and gender population statistics)

S3 Please indicate your gender... S4 In which of the following age bands do you belong?

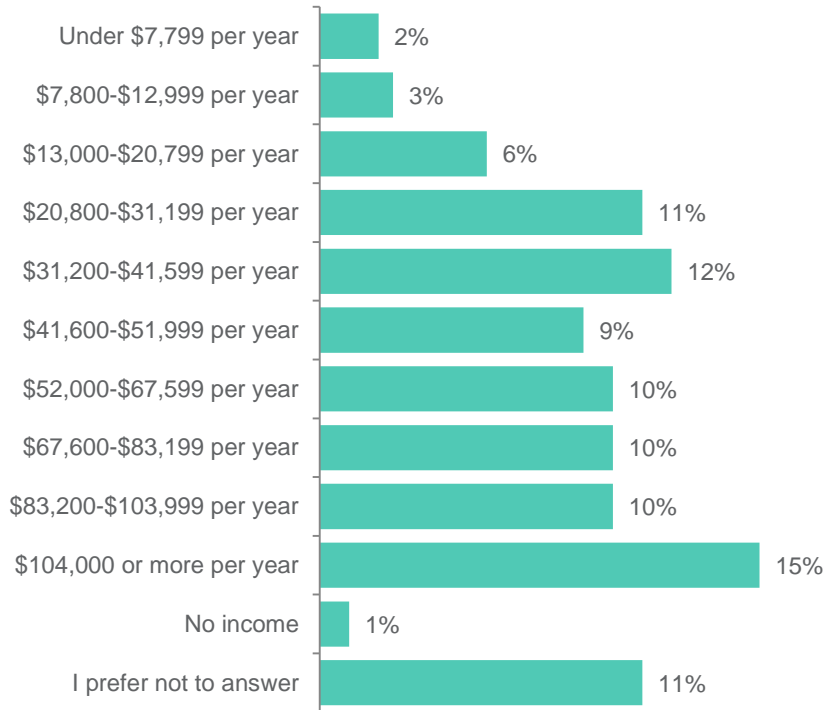
S5 Which of the following best represents your household D2. What is your current employment status?

Base: Total Sample n=1,036



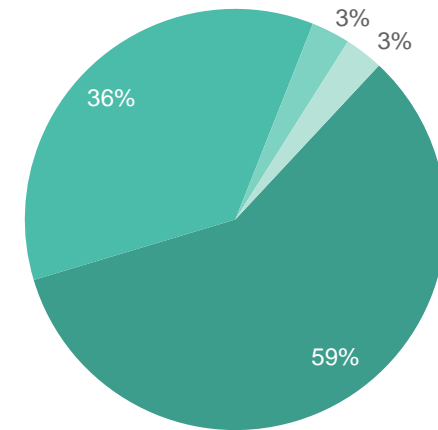
Income

Total Respondents (n=1,036)



Current Living Arrangement

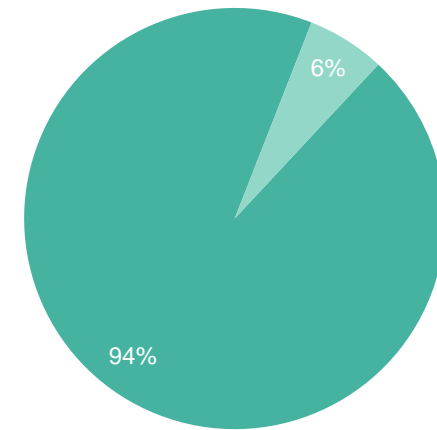
Total Respondents (n=1,036)



■ I am living in my own property ■ I am living in a rental property ■ Other ■ I prefer not to answer

Affiliation with Environmental Group/Cause

Total Respondents (n=1,036)



■ No ■ Yes

UNWEIGHTED DATA PRESENTED (weighting protocol utilises region, age and gender population statistics)

D3. What is the total of all wages / salaries, Government benefits, pensions, allowances and other income that YOUR HOUSEHOLD usually receives (Gross – before tax and superannuation deductions)?

D1. What is your current living arrangement? S6. Are you a member, or affiliated with, any environmental groups or causes currently?

Base: Total Sample n=1,036



Region definitions: Postcode Allocation by region.

| <i>Region</i> | <i>Postcodes within region</i> |
|-----------------------|--|
| Coastal | 4870, 4878, 4879, 4881, 4670, 4807, 4809, 4808, 4806, 4810, 4815, 4811, 4805, 4804, 4660, 4673, 4677, 4674, 4678, 4676, 4868, 4680, 4873, 4877, 4671, 4694, 4695, 4697, 4702, 4737, 4738, 4741, 4650, 4570, 4741, 4580, 4581, 4816, 4655, 4861, 4860, 4852, 4854, 4858, 4855, 4856, 4859, 4816, 4849, 4816, 4817, 4818, 4703, 4710, 4701, 4700, 4704, 4740, 4620, 4659, 4662, 4711, 4706, 4754, 4757, 4753, 4756, 4751, 4699, 4714, 4869, 4865, 4814, 4812, 4813, 4601, 4600, 4850, 4850, 4871, 4872, 4819, 4895, 4799, 4750, 4798, 4800, 4802, 4803, 4801 |
| Resources | 4721, 4742, 4745, 4743, 4746, 4744, 4405, 4454, 4715, 4719, 4419, 4420, 4405, 4716, 4405, 4428, 4427, 4406, 4467, 4413, 4408, 4425, 4412, 4415, 4416, 4410, 4424, 4418, 4421, 4411, 4724, 4726, 4725, 4728, 4705, 4718, 4732, 4722, 4717, 4723, 4712, 4720, 4709, 4739, 4707, 4824, 4825, 4890, 4891, 4828, 4462, 4455, 4465, 4423, 4426, 4461, 4417, 4422 |
| Rural / Remote | 4365, 4627, 4625, 4472, 4474, 4487, 4488, 4605, 4615, 4621, 4626, 4630, 4481, 4736, 4480, 4478, 4470, 4730, 4482, 4735, 4733, 4731, 4727, 4883, 4885, 4886, 4888, 4884, 4882, 4820, 4823, 4829, 4613, 4610, 4608, 4606, 4612, 4611, 4497, 2406, 4496, 4385, 4390, 4387, 4494, 4872, 4498, 4388, 4384, 4874, 4380, 4370, 4362, 4378, 4382, 4375, 4374, 4371, 4381, 4377, 4373, 4372, 4376, 4383, 4880, 4887, 4822, 4821, 4486, 4492, 4490, 4493, 4477, 4468, 4479, 4491, 4489, 4475 |
| SEQ | 4110, 4115, 4108, 4116, 4078, 4106, 4118, 4034, 4036, 4035, 4032, 4053, 4505, 4508, 4509, 4506, 4504, 4022, 4306, 4352, 4214, 4216, 4212, 4215, 4207, 4556, 4557, 4553, 4171, 4152, 4170, 4151, 4172, 4300, 4304, 4301, 4303, 4357, 4361, 4404, 4220, 4221, 4228, 4227, 4407, 4551, 4519, 4550, 4161, 4159, 4157, 4158, 4160, 4153, 4156, 4155, 4154, 4173, 4010, 4007, 4011, 4009, 4031, 4051, 4030, 4008, 4359, 4313, 4401, 4355, 4350, 4563, 4353, 4356, 4364, 4403, 4358, 4574, 4354, 4400, 4360, 4363, 4614, 4209, 4208, 4210, 4060, 4066, 4065, 4520, 4059, 4064, 4061, 4225, 4223, 4224, 4054, 4500, 4055, 4037, 4211, 4213, 4510, 4514, 4552, 4512, 4521, 4516, 4517, 4554, 4560, 4518, 4555, 4120, 4121, 4122, 4102, 4076, 4077, 4075, 4305, 4340, 4346, 4280, 4124, 4285, 4575, 4503, 4501, 4502, 4343, 4341, 4311, 4344, 4342, 4347, 4133, 4125, 4270, 4174, 4179, 4178, 4205, 4130, 4129, 4128, 4006, 4000, 4005, 4069, 4068, 4067, 4123, 4572, 4573, 4564, 4558, 4218, 4226, 4103, 4105, 4104, 4070, 4074, 4073, 4021, 4020, 4312, 4515, 4402, 4569, 4562, 4568, 4561, 4559, 4565, 4567, 4571, 4566, 4014, 4013, 4012, 4183, 4163, 4184, 4164, 4507, 4511, 4025, 4019, 4165, 4017, 4018, 4307, 4310, 4309, 4287, 4275, 4272, 4169, 4101, 4217, 4127, 4113, 4117, 4112, 4109, 4111, 4107, 4114, 4131, 4119, 4132 |

