# TAB 2

# EXHIBIT 1

# 2005 Recycle Plus Tracking Survey

## Executive Summary

# EXECUTIVE SUMMARY

**THE RECYCLE PLUS PROGRAM CONTINUES TO RECEIVE EXTRAORDINARILY HIGH FAVORABLE RATINGS AMONG ALL RESIDENTS, AND STRONG SATISFACTION RATINGS AS WELL FROM SFD (SINGLE-FAMILY DWELLING) AND MFD (MULTIPLE-FAMILY DWELLING) RESIDENTS.**

- As was the case in 2003 (the last time a Recycle Plus tracking poll was conducted) the program receives its all-time high favorable rating of 88 percent for all residents, another all-time high favorable rating for SFD residents at 90 percent, and a near record high 79 percent for MFD residents (down just 1 point from the 80% recorded in 2003). Three of five (60%) say they have a "very" favorable opinion of the program. Unfavorable opinions do not exceed 10 percent among any identified group of residents (i.e. by race, age, length of residency, housing status, etc.).

- The program also receives very high satisfaction ratings for:

    - The collection of garbage (87% satisfied),
    - the collection of recyclable materials (85% satisfied),
    - the type of materials that can be recycled (78% satisfied),
    - collection of yard trimmings (70% satisfied, including 76% satisfied among SFD residents), and
    - Street sweeping services (63% satisfied and 16% dissatisfied).

- The program receives lower positive ratings for "the opportunity to recycle in public places in San Jose," at 43 percent satisfied and 16 percent dissatisfied. Many residents have no opinion about this.

- The results of these questions cannot be compared to those found in previous studies as we altered the scale this year as part of a gradual conversion from four point to five point rating scales.

- Satisfaction ratings were generally lower for MFD residents, for renters, and for those who say they recycle less of what could be recycled.

**SLIGHT DECLINE IN REPORTED RECYCLING, BACK TO LEVELS FOUND IN STUDIES BEFORE 2003. MUCH LOWER REPORTED RECYCLING FOUND AMONG MFDS COMPARED TO SFDS.**

- Residents report recycling on average 76 percent of what could be recycled at their home. This level matches what was reported in the 1999 through 2002 surveys, but is slightly lower than the 81 percent reported in the 2003 survey. This small difference could be due to slightly lower enthusiasm about recycling now that several years have passed since the single-container system was introduced – or it could be due to slight variations in weighting or other methodological differences between the studies.

- Overall, 43 percent report recycling 90 percent or more of what could be recycled, with just 10 percent recycling less than 50 percent.

- We did see lower levels of reported recycling among MFDs: only 32 percent of MFDs, compared to 47 percent of SFDs report recycling 90 percent or more of what could be recycled. The mean proportion recycled reported by MFDs was 66%, compared to 80 percent for SFDs.

- Long time residents, homeowners, and residents over 30 are all more likely to recycle in higher proportions compared to newer arrivals (under 6 years in San Jose), renters, and those under 30.

**RECYCLING PUBLIC EDUCATION EFFORTS CONTINUE TO RECEIVE HIGH MARKS AMONG SFD RESIDENTS: MOST AGREE, AND ESPECIALLY 100% RECYCLERS, THAT CITY DOES GOOD JOB OF KEEPING THEM INFORMED ABOUT RP PROGRAMS AND SERVICES AND ABOUT HOW TO RECYCLE. LOWER RATINGS AMONG MFD RESIDENTS.**

- Sixty-eight percent agree that the city does a good job of keeping them informed about RP programs and services, with just 13 percent who disagree. But there is a major difference between SFD and MFD respondents on this question: 74 percent of SFDs feel well informed, compared to just 55 percent of MFDs.

- People who recycle everything also feel better informed compared to those who recycle 75 percent or less (75% to 59%). Long-time residents (20+ years) feel better informed than newcomers (under 6 years) at 71

percent to 49 percent. Also, people who live in buildings with more than 100 units feel far less informed (at 41% who agree) than those living in buildings with 20 or fewer units (62%).

- Fully 68 percent agree that the city does a good job of keeping people informed of how to recycle. Just 10 percent disagree. However, again we see a big difference between SFD and MFD responses: 73 percent of SFDs agree compared to 56 percent of MFDs.

- We note that 100 percent recyclers are considerably more likely to feel informed about how to recycle compared to those who recycle 75 percent or less (77% to 55%).

**MIXED REVIEWS ON WHETHER THE CITY DOES A GOOD JOB EXPLAINING WHAT HAPPENS TO MATERIALS THAT ARE RECYCLED.**

- Forty-three percent agree and 29 percent disagree that the city does a good job explaining what happens to the materials they recycle. This includes 47 percent of SFD residents who agree, compared to 34 percent of MFDs.

**NEARLY SIX IN TEN SFD RESPONDENTS SAY WHAT THEY PAY FOR GARBAGE AND RECYCLING IS A GOOD VALUE.**

- In both the 2003 and 2005 studies, we found that about 60 percent agreed (63% in 2003, 59% in 2005, a difference that is not significant) that what they pay for garbage and recycling collection is a good value. Among 100 percent recyclers, 73 percent agree that the RP program offers good value, compared to just 55 percent of those that recycle only 75 percent or less.

**TREND OF DECLINE IN OVERFLOWING GARBAGE CARTS CONTINUES AMONG SFD RESIDENTS. INCREASE IN PROPORTION WHO HAVE LESS FULL GARBAGE CARTS**

- The proportion of SFD residents who say their garbage carts are typically overflowing fell from 9 percent in 2003 to 4 percent in 2005. At this same time, the proportion who say their carts are usually full rose from 40 percent to 46 percent. Both these differences are significant. We did see an increase in the proportion who said their carts are typically three-quarters full or less, from 42 percent last year to 49 percent this year.

- Latinos, and those in larger households tend to fill their garbage carts more. Among those with five or more in the household, 70 percent say their carts are filled or overflowing, compared to just 23 percent of those living alone. Among Latinos, 62 percent say their carts are usually full or overflowing, compared to 46 percent of whites and Asians.

**NO REAL CHANGE IN PROPORTION OF SFD RESIDENTS WITH FULL OR OVERFLOWING RECYCLING CARTS.**

- In 2003, 35 percent of SFD respondents said their recycling carts were usually full (31%) or overflowing (4%). In 2005, 38 percent say their recycling carts are usually full (36%) or overflowing (2%). This difference is not significant.

- Those in large households tend to have not only full or overflowing garbage carts (as described above) but also have full or overflowing recycling carts. That is, among those living with five or more in the household, 33 percent have full or overflowing recycling carts, compared to just 7 percent of people living alone.

- Asians are less likely than others to have overflowing recycling carts and are more likely than others to say they fill their carts only half way or less (23% of Asians, compared to about 15 percent of whites).

**JUST UNDER A THIRD OF MFD RESIDENTS REPORT OVERFLOWING GARBAGE AND RECYCLING CONTAINERS, BUT THE PROBLEM IS WORSE AMONG THOSE LIVING IN LARGE COMPLEXES.**

- Thirty-one percent of MFD residents say their garbage containers are often overflowing, and 30 percent say that their recycling containers are often overflowing.

- However, for those living in buildings with more than 100 units, the problem of overflowing recycling containers is much worse: 39 percent say their containers are frequently overflowing, compared to about 27 percent of those living in buildings with fewer units.

**LESS FREQUENT RECYCLERS MORE LIKELY TO LACK MOTIVATION AND GOOD SYSTEM FOR RECYCLING; MANY RESIDENTS SAY THEY ARE NOT SURE ABOUT WHAT CAN BE RECYCLED.**

- Respondents were asked if they agreed or disagreed with several possible reasons for not recycling.

    - Forty-five percent agreed that they are "sometimes not sure about what can and cannot be recycled." Those who say they recycle 75 percent or more of what could be recycled are as likely as those who recycle less to say that they are not sure about what can be recycled.

    - Twenty-four percent agreed that "recycling is just not that high a priority for me at this time." Among those that recycle 75 percent or more, only about 20 percent agree. Among those that recycle less than 75 percent, fully 35 percent agree.

    - Twenty-one percent agreed that their household "doesn't have a good system for sorting out recyclable materials from regular garbage." Again, among those that recycle 75 percent or more, only about 18 percent agree. Among those that recycle less than 75 percent, fully 34 percent agree.

    - Thirty-one percent (of MFDs only) agreed that the building where they live "does not have make it convenient to recycle." And again, among those that recycle 75 percent or more, only about 25 percent agree. Among those that recycle less than 75 percent, 37 percent agree.

- Latinos and renters are more likely than homeowners and whites to say that recycling is not a priority. In fact, 39 percent of Latinos and 29 percent of renters say recycling is not a priority. We also see that those with lower education levels are more likely to say recycling is not a priority: among those without any college, 37 percent say recycling is not a priority compared to about 22 percent of more educated residents.

- Latinos, renters, and those living in buildings with 101+ units are most likely to say their household lacks a good system for recycling. In fact, 30 percent of Latinos say they lack a good system. We also see that among

those who recycle 100 percent of the time, only 17 percent say they lack a good system, while among those who recycle less often, fully 34 percent say they lack a good system.

- Forty-one percent of Latino MFD residents say their building makes it inconvenient to recycle, compared to 28 percent of white MFD residents.

**MOST SFD RESIDENTS ARE AWARE OF BULKY ITEMS COLLECTION SERVICE AND EXTRA GARBAGE STICKERS.**

- Nearly three of four, 72 percent, are aware of the bulky items collection service. Those with garbage carts that are typically full or overflowing are less likely to be aware of this service compared to those with carts that are half full or less (72% compared to 83%). Newcomers to San Jose are far less aware of the service compared to long-time residents (52% of those in the city for five years or less compared to 79 percent of long-time residents). Whites are far more aware of this service than Asians (80% to 61%).

- We also see that whites are more aware of the extra garbage stickers than Asians (64% to 47%).

**ONE IN FOUR SAY THEY USE COMPOST, WITH NEARLY HALF OF COMPOST USERS SAYING THEY MAKE AT LEAST PART OF THE COMPOST THEY USE.**

- Nearly one in four (23%) say they use compost (including 28% of SFD residents). Of those, 53 percent say they buy the compost, but 26 percent say they make their compost and another 18 percent say they do both. That is, 44 percent of compost users, or about 10 percent of all residents, say they make at least part of the compost they use.

**NO SIGNIFICANT CHANGE IN AWARENESS OF THE COUNTY HHW PROGRAM. HALF KNEW PROPER WAY TO DISPOSE OF ELECTRONICS.**

- Fifty-eight percent were aware of the county Household Hazardous Waste collection program, although this figure was much lower among MFD residents (50%) compared to SFDs (63%). Renters, newcomers, and minorities were far less aware of the program compared to homeowners, long-time residents, and whites.

- While about half correctly identified televisions and computer monitors as HHW requiring special disposal, only 39 percent knew that fluorescent bulbs required the same type of disposal. MFD residents were considerably less able (at about 40%) than SFDs (at about 52%) to identify the proper disposal method for televisions and computer monitors.

**MAILING POSTERS AND BROCHURES AND BILL INSERTS SEEN AS BEST WAYS TO COMMUNICATE WITH RESIDENTS ABOUT THE RECYCLE PLUS PROGRAM.**

- Among SFD residents, 39 percent said that "mailing posters and brochures directly to you" was the best way for the city to share information about how to recycle, and 38 percent said that sending bill inserts was the best way. Small proportions preferred other approaches. Of those that prefer bill inserts, we found on average that they report reading them 67 percent of the time, compared to much lower proportions for those who prefer other means of communication. Only 49 percent of SFD residents preferring bill inserts, however, are aware of the Curbside Courier.

- Among MFD residents, 57 percent said that mailing posters and brochures was the best way to share information about how to recycle, and 18 percent said that providing information to their leasing office was the best way. Small proportions preferred other approaches.

- Among SFD residents who recycle most frequently, bill inserts were much more popular than other alternatives. But among those who recycle less frequently, posters and brochures were preferred over bill inserts. We also see that posters and brochures are preferred over bill inserts among minorities compared to whites.

**MORE THAN HALF EITHER DO NOT HAVE A COPY OF THE RECYCLING GUIDE AT HOME OR ARE NOT SURE. THOSE WITH THE GUIDE ARE MORE LIKELY TO RECYCLE 100 PERCENT OF WHAT THEY COULD RECYCLE.**

- The 48 percent who say they do have the Guide at home is a drop from the 57 percent that was found in the 2003 survey. However, the passage of time since dissemination of the Guide in 2002 may explain this difference. In fact, 8 percent of respondents arrived in San Jose in the last two years,

and fully 12 percent were not in San Jose the last time the guide was distributed.

- We find far fewer MFD residents (31%) compared to SFDs (56%) who say they have the Guide. Renters, newcomers to the city, Latinos, and those under 30 are far less likely to have the Guide at home. We also note that half of those who recycle 100 percent have the Guide at home, compare to just 32 percent of those recycling 75 percent or less.

**MOST RESIDENTS WITH THE GUIDE SAY IT WAS USEFUL IN HELPING THEM TO RECYCLE.**

- Fully 59 percent of all residents rated the Guide as useful in helping them to recycle, with just 4 percent who said it was not useful. But of those who have the Guide in their home at present, 89 percent said it was useful.

**SFD RESIDENTS SAY THEY READ BILL INSERTS 56 PERCENT OF THE TIME. 100 PERCENT RECYCLERS READ BILL INSERTS MORE OFTEN.**

- Overall, SFDs report reading bill inserts 56 percent of the time on average. Renters (in SFDs) read it far less frequently than homeowners.

- Those that recycle 100 percent of the time, read the bill inserts about 66 percent of the time, compared to just 45 percent of those that recycle 75 percent or less.

**ABOUT SIX IN TEN SFD RESIDENTS NOT AWARE OF THE CURBSIDE COURIER, AND ONLY ABOUT 27 PERCENT HAVE READ ONE.**

- Forty-one percent of SFDs say they are aware of the Curbside Courier, and of those, 67 percent have actually read a copy. That comes to about 27 percent of all SFD residents who have read a copy of the Curbside Courier.

- However, 75 percent of those who have read it say it was useful to them.

**TWO OF THREE SFD RESIDENTS RECALL RP PACKET REFRIGERATOR MAGNET AND NEARLY ALL SAY IT WAS USEFUL TO THEM.**

- Sixty-seven percent of SFD residents said they do recall receiving a packet and magnet with information about the RP program. This includes 78 percent of whites and 59 percent of Asians and 58 percent of Latinos. Among those recycling 100 percent, 85 percent recall the packet, but among those recycling 75 percent or less, just 58 percent recall the packet.

- Eighty-three percent of those that recall the packet said it was useful to them. One hundred percent recyclers were more likely than less complete recyclers to say the packet was useful.

**RECYCLE PLUS CUSTOMER SERVICE LINE IS NOT WIDELY USED, BUT IS HIGHLY RATED BY THOSE WHO DID USE IT. SATISFACTION AMONG USERS HAS INCREASED SUBSTANTIALLY SINCE 2003.**

- Only 16 percent of residents say they called the RP Customer Service line in the past six months, down slightly (and not significantly) from the 19 percent seen in 2003. Only 4 percent of MFD residents called the line, compared to 19 percent of SFD residents. Those living in San Jose for 20 or more years were twice as likely to have called the line compared to those living in San Jose for less than six years (14% to 7%).

- Fully 86 percent of those who called the line said they were satisfied with it, a sizable increase compared to the 65 percent who were satisfied in the 2003 study.

**FEW HAVE VISITED CITY WEBSITE, BUT MOST WHO DID FOUND WHAT THEY WERE SEEKING THERE.**

- Only 17 percent said they visited the city's RP website, but of those who did visit, 73 percent said they found what they were looking for there. SFDs were far more likely to visit the website (at 19%) compared to MFDs (at 7%). Those with college degrees (51% of adult residents) were also more likely to visit the website (at 18%, compared to 8% of those without a college degree).

## CONCLUSIONS AND RECOMMENDATIONS

Overall, the survey shows continued high marks for the Recycle Plus program and for efforts to communicate with the public about recycling. On measure after measure, the program is at or near all time highs when it comes to public ratings and responses.

There are some declines noted in responses compared to the 2003 study - most notably in the reported proportion of actually recycling what could be recycled, and in the proportion possessing a copy of the Recycling Guide.

But in evaluating these changes, two things should be noted:

- First, it has been several years since the city rolled out its new, single-bin system. It is not surprising that interest in and awareness of recycling efforts might decline slightly since the rollout. For example, it seems very much expected that the proportion who have the Recycling Guide in their home might decline over the last three years. This would be typical of any document in the home over time.

- Second, we note that the 2005 survey contacted a greater proportion of minorities than has been the case in the past. While the proportion of Asians and Latinos in this survey still fall a few points below the expected proportions based on Census data, they are still much higher than what was observed in the 2003 survey. For example, in that study 54 percent were white, compared to 44 percent in this study. (The latest Census data suggests that 47 percent in San Jose are white). This variation could be due to differences in interviewing call-back procedures, or might simply be due to chance. The point is that non-whites consistently report lower levels of recycling, are less informed about recycling, and have less access to recycling materials. Thus any lack of growth or leveling off of ratings for the RP program in this study might simply be the result of more minorities in the sample.

That said, we can make several recommendations based on the survey findings.

First, it seems clear that MFD residents need much more attention from the program. Compared to SFD residents, they offer lower satisfaction rates for the program, they report recycling less, they feel less informed about the program and about how to recycle, they are less familiar with the HHW program, and are

far less likely to have a copy of the Recycling Guide or to have used the Service Line or the website.

At a minimum, they need more vehicles for communications. SFD residents get bill inserts, the Curbside Courier, and the packet with the magnet. MFD residents get fewer types of contacts from the city. The survey shows that they strongly prefer brochures and posters sent to them, although another sizable proportion say that information distributed through their leasing office would be useful.

Second, the survey reveals several other target groups. In particular, residents under 30, renters of SFDs, Asians, Latinos, and newcomers to the city all tend to recycle less and report less information about recycling.

Third, the city might want to consider ways to address problems that large households and Latinos are having with overflowing garbage and recycling carts. Interestingly, we see that Asian respondents are far more likely than others to say they fill their recycling carts only half way, even though they report living in households with more people compared to whites and Blacks.

Fourth, we see continued problems with MFDs residing in large apartment complexes. They are far more likely to report overflowing recycling containers.

Fifth, we see that not knowing what can and cannot be recycled continues to be a problem for nearly half the city's residents, and especially among those who report recycling smaller proportions of their home's materials. In addition we see sizable proportions of Latinos, renters, those who live in large apartment complexes, and those who do not recycle as much tell us that they lack a good system for how to recycle in their home (that is, for how to get materials out to the collection bins).

This suggests that the city needs to continue on a very regular basis to disseminate basic, "how-to" and "what" materials to residents. Residents lose their materials or they forget. Newcomers may never get the city's arrival package. This material needs to explain not just what can be recycled, but also needs to assist in explaining a good system (especially for MFD residents) for getting the materials to the collection bin.

Sixth, there is still work to be done about the proper way to dispose of electronic equipment, and especially among newcomers, renters, MFDs, and non-whites. continued efforts are needed to inform members of these groups in particular.