



Water and Waste Department

Comprehensive Waste Management Plan –
Phase 2 Phone Survey Report

Date: May 2011

Leger
MARKETING

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Executive Summary

- Garbage and recycling collection are of primary concern to most residents in Winnipeg, but strongest among curbside garbage users. Residents in Winnipeg are satisfied with their current garbage collection and recycling services, versus landfill maintenance and composting services.
- Nine out of ten feel that a community should demonstrate care and protection of our environment in attracting and keeping young people. Four in five feel that waste diversion should increase from the current 17% to 50%, even if it was to cost residents more today.
- About three-quarters of Winnipeg residents currently use Blue Boxes, with most residents using just one or two Boxes. Three-quarters of residents support the notion of adding another Blue Box to increase recycling. Just over half approve of the use of Blue Automated Carts.
- Nearly all Winnipeg residents support the establishment of community drop-off depots to help recover or reuse items. Most approve of paying less for using such depots if they had an option to separate their items in advance.
- Over two-thirds of residents dispose of organic waste in regular garbage, and only one-quarter have composters.
- Both yard waste collection options are equally supported, whether it is biweekly collection from April to November or doing just four collections in spring/fall.
- Nearly two-thirds of Winnipeg residents would like to see a curbside kitchen waste organics program created, but paying a fee of \$30-\$40 is supported by just under half of residents.
- Over half of residents put out just one bag of garbage for weekly collection.
- Most residents support the idea of phasing out AutoBins. The implementation of Automated Cart Collection for garbage finds just over half of residents supportive.
- Just over half of residents are aware of the City's bulky waste pickup service and one quarter has actually used it.
- Half of Winnipeg residents support the idea of a City-wide user fee to pick up bulky waste materials. Slightly more are supportive of a program that carries no direct charge but is tax-supported. Just over one-quarter would support discontinuing services, allowing for self-hauling or private industry.
- Most residents are familiar with Brady Road landfill, but only one-fifth go there regularly. Most would support changing the focus at the landfill to increase waste diversion programs, along with composting and green park ideas to reuse materials.

Background and Method

The City of Winnipeg contracted Leger Marketing to provide telephone survey services as part of Phase 2 of its Comprehensive Waste Management plan.

This study was completed by telephone from March 26 to April 20, 2011 among Winnipeg residents 18 years of age and older, who are responsible for home maintenance decisions and bill payments.

The survey objectives were to establish opinion levels around the options being considered as part of the Garbage and Recycling Master Plan; as well as the usage, habits, perceptions and satisfaction of waste management services.

Using a random sample of 1,560 respondents this method simulates a probability sample that would yield a maximum margin of error of $\pm 2.5\%$, 19 times out of 20.

Surveys were completed in the following Winnipeg garbage service collection areas:

Garbage Collection Type	Unweighted N	Margin of Error	Weighted N
Individual curbside/manual	417	$\pm 4.8\%$	606
Backlane Shared AutoBin/ Wheelbarrow Carts in AutoBin Areas	376	$\pm 5.1\%$	134
Automated carts	384	$\pm 5.0\%$	241
Apartment/Condo	383	$\pm 5.0\%$	578
Total	1,560	$\pm 2.5\%$	1,560

Quality Control

Leger Marketing's experience and expertise in public opinion and marketing research extend to the quality and standards of every research project. Detailed verification and validation procedures at each stage of the process ensure data accuracy.

Demographics

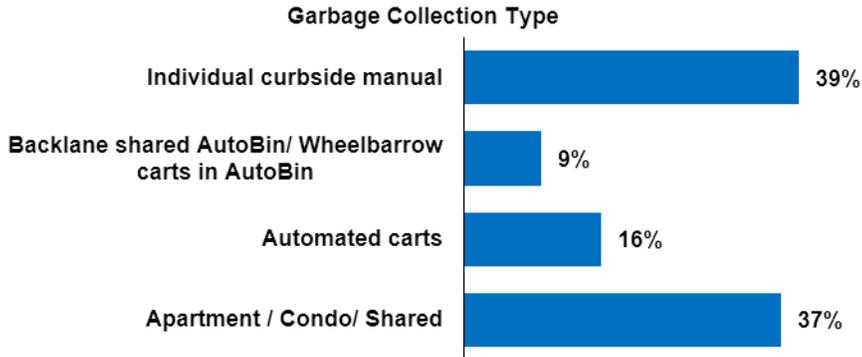
Variable	Overall Telephone (N=1,560)	Variable	Overall Telephone (N=1,560)
Gender		Children aged 15 or less	
Men	39%	Yes	20%
Women	62%	No	80%
Age		Years in Winnipeg	
18-24	2%	Less than 2 years	2%
25-34	9%	2-5 years	6%
35-44	14%	6-10 years	5%
45-54	17%	More than 10 years	86%
55-64	23%	Refused	1%
65-74	19%	Income	
75+	15%	Under \$10K	2%
Education		\$10K-\$29,999K	13%
Grade school/ Some high school	7%	\$30K-\$59,999K	19%
Completed high school	27%	\$60K-\$79,999K	9%
Some post-secondary	13%	\$80K+	19%
Completed college or university	50%	DK/Refused	38%
DK/Refused	4%	Housing	
Waste Collection		Rent	26%
Individual curbside manual	39%	Own	73%
Back lane shared AutoBin/ Wheelbarrow carts in AutoBin	9%	DK/Refused	1%
Automated carts	16%	Composting	
Apartment/Condo/Shared	37%	Yes	26%
Dwelling Type		No	74%
Single detached house	60%	Recycling Participation	
Apartment	24%	Blue Box	75%
Duplex/ Multiplex	4%	Other	19%
Condominium	12%	Do not recycle/Refused	6%
Region of Winnipeg		Number of garbage bags/week	
Northwest	21%	One or less	57%
Northeast	16%	Two	25%
Southeast	21%	Three	9%
Southwest	30%	Four	5%
Core	12%	More than four	3%
		DK/Refused	1%

Totals may exceed 100% due to rounding up per cents.

Overall

Garbage Collection Types

All respondents were asked to define how their garbage is collected. This determined the weighting for the final results of the study.



Respondents with Individual Curbside manual collection are more likely to display the following characteristics:

- Live in a single detached house (60%); and own their home (51%);
- More likely to be between the ages of 35-64 years old (45%);
- More likely to have completed college/university (44%);
- Have lived in Winnipeg 10 years or more (40%);
- Recycle via the Blue Box (50%), compost (54%), and have annual income above \$60K (49%).

Respondents with Backlane shared Autobin/Wheelbarrow carts collection are more likely to display these traits:

- Live in a single detached house (61%);
- More likely to be living in the core (48%).

Respondents with Automated carts collection are more likely to display these traits:

- Live in a single detached house (24%); and own their home (20%);
- More likely to be living in the NorthWest area (60%);
- Recycle via the Blue Box (20%).

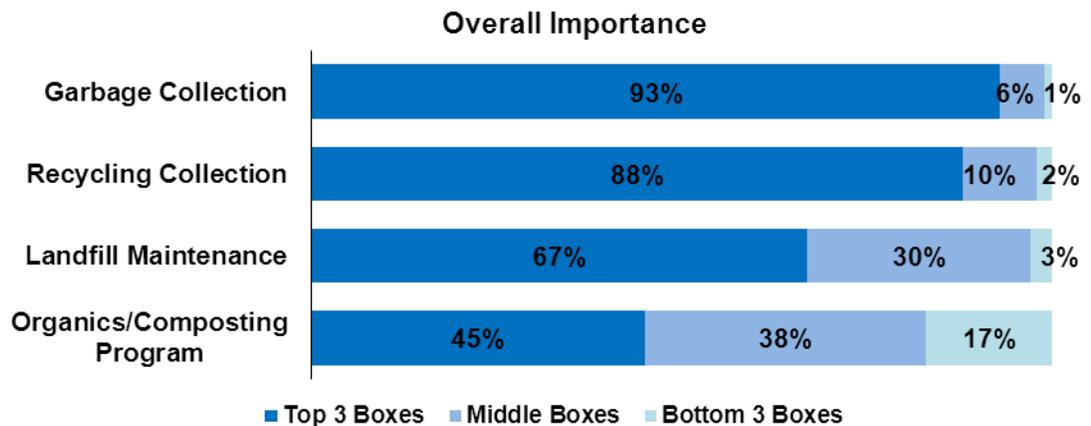
Respondents with Apartment/ condo/ shared collection are more likely to display these traits:

- More likely to renting their home (84%);
- Are women (39%), and are between the ages of 18-44 (32%), or over 55 years old (43%);
- Are earning less than \$60K (48%), and have high school education (44%);
- More likely to be living in the regions of SouthWest (45%), SouthEast (40%), or NorthEast Winnipeg (38%);
- Have no children at home aged 15 or less (40%);
- Only lived five years or less in Winnipeg (46%).

Satisfaction and Importance of Services

Winnipeg residents feel that there is high importance in having their garbage and recycling collected. Further, their satisfaction is rated higher on these two main essential services. For landfill maintenance and organics/composting programs, these were not completely unimportant, but also generated less satisfaction.

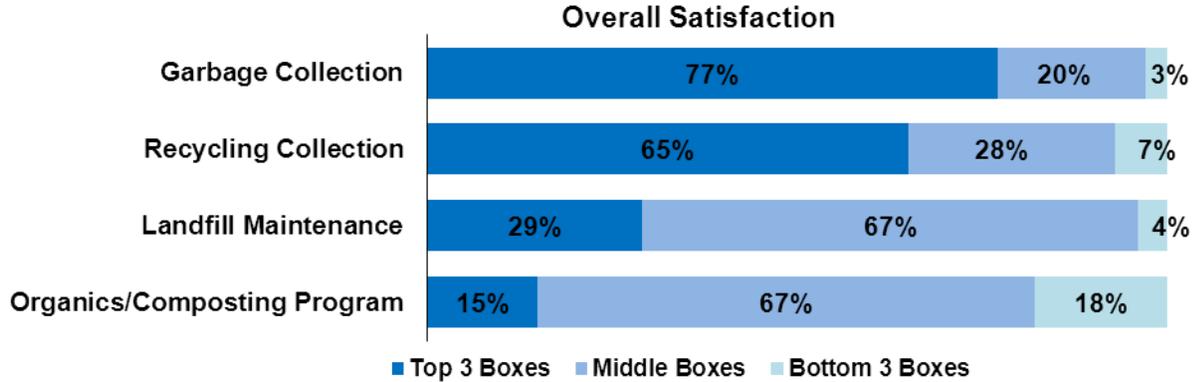
- Women find all four of these services more important than men, but only rate satisfaction higher than men in terms of garbage collection.
- Those with curbside collection rated all collection services with high importance (garbage 95%, recycling 91%, landfill maintenance 68%, organics/composting 45%).
- Residents in apartments/condos gave high importance on many collection types (garbage 91%, recycling 87%, landfill maintenance 68%, organics/composting 48%).
- While nine in ten find recycling to be highly important, these are likely to be comprised of those who recycle already (Blue Box 90%, other recycling 88%) do composting (94%), and throw out one bag or less of garbage weekly (90%).
- About half find that the organics/composting program is highly important, and many of these are residents who are recycling now (Blue Box 45%, other recycling 51%) and do composting (57%), and throw out one bag or less of garbage weekly (48%).
- Residents living in the SE part of Winnipeg find Landfill Maintenance more important (74%).
- Those who do not recycle are not satisfied with recycling collection (29% in bottom three box scores.)



G2. I'm going to name some topics and I'd like you to tell me how important each is to you. Let's use a 10-point scale where 1 means this is "not important at all" to you and 10 means it is "very important". How important is... (RANDOMIZE) Base: (n=1,560)

***Note: On a 10 point scale 'top box' indicates an 8-10 score, 'middle box' a 4-7 score and 'bottom 3 box' a 1-3 score.**

About three quarters of residents are highly satisfied with garbage collection services (77%). Another two thirds were quite satisfied with their recycling collection services (65%).



G3. Now I'd like to read those same topics again and I'd like you to tell me how satisfied you are with each of them. Again, we'll use a 10-point scale where 1 means that you are "not at all satisfied" and 10 means that you are "very satisfied". How satisfied are you with...(RANDOMIZE) Base: (n=1,560)

Those giving top box scores for satisfaction with garbage collection services include;

- Residents who are 65+ (74%), and women (80%),
- Are more likely to not have children under 15 at home (79%);
- Own their home (79%); and have curbside manual collection (81%);
- Live in the SouthEast region (84%)
- Throw out one bag or less of garbage (79%).

Those giving top box scores for satisfaction with recycling collection services include;

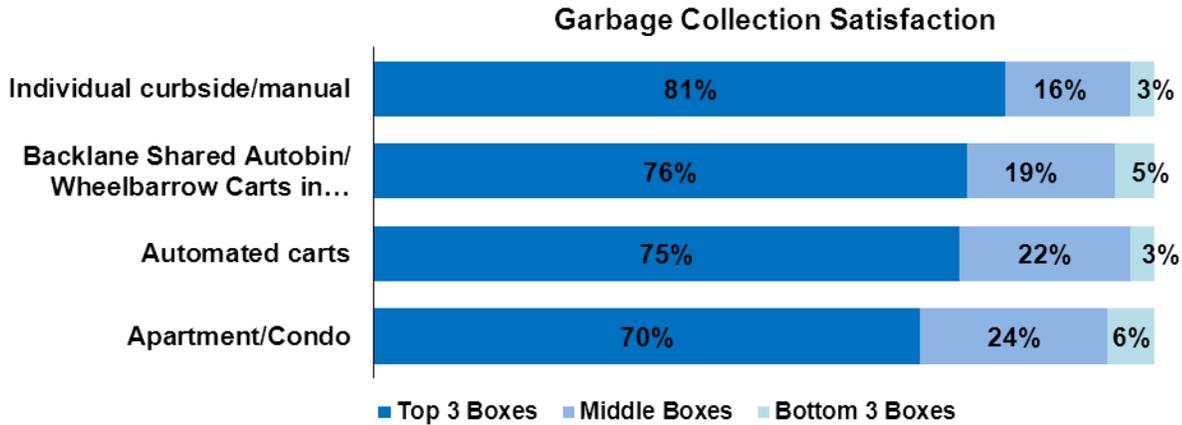
- Residents who are 65+ (83%),
- Are more likely to not have children under 15 at home (67%);
- Own their home (67%); and have curbside manual collection (67%);
- Are recycling already (Blue Box 68%, other recycling 65%),
- Throw out between one to two bags of garbage weekly (67%).

Those giving top box scores for satisfaction with landfill maintenance services include;

- Residents that usually throw out two bags of garbage weekly (33%);
- Those who have lived under five years in Winnipeg (41%).

Those giving top box scores for satisfaction with organics/composting programs include;

- Those that tend to throw out three or more bags of garbage weekly (20%);
- Residents that have lived under five years in Winnipeg (25%);
- Are more likely to rent their home (19%);
- Live in an apartment (19%).



The top box scores for importance and satisfaction show differences between each type, shown as a gap. Gap analysis is most useful for determining which attributes should be addressed in order to maximize fulfillment, and which are performing at their peak. All the top box scores between importance and satisfaction have significant differences that are beyond the maximum margin of error of $\pm 2.5\%$, 19 times out of 20, for 1,560 respondents surveyed.

	Importance - Satisfaction Gap
Landfill maintenance	67% - 29%=38%
Organics/ composting program	45% - 15%=30%
Recycling collection	88% - 65%=23%
Garbage collection	93% - 77%=16%

The rankings of top box scores are shown above. We see that landfill maintenance, which has about two-thirds of residents finding this important (67%) but is scoring extremely low on satisfaction (29%). This is an area which would be a ‘must fix’ to address by the city in falling short of resident’s expectations.

The organics composting program is important to just under half of residents, so of a middle range priority, but failing to satisfy as only 15 per cent rate satisfaction with this program as top box scores. This is an ‘opportunity’ for the city to improve services and prove that this can be an important program for residents to use.

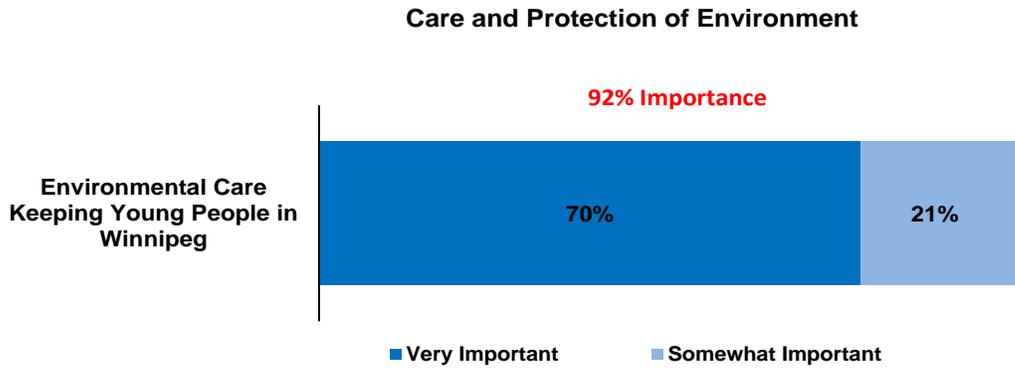
The recycling program is important to nine out of ten residents (88%) in top box scores, but satisfying about two-thirds in high ratings. This is another ‘must fix’ for the city to push up satisfaction to meet the priority placed on the importance of this service.

The smallest gap overall is on garbage collection, which is important to nearly all residents and four in five are satisfied. This is the service carrying the most strength in services, and must be maintained.

Environment Protection

Most Winnipeg residents feel that a community should demonstrate care and protection of our environment in attracting and keeping young citizens in Winnipeg (92%).

- Women find this to be important (94%) more than men (89%), along with younger residents aged 18-44 (96%) and those who lived in Winnipeg five years or less (98%).

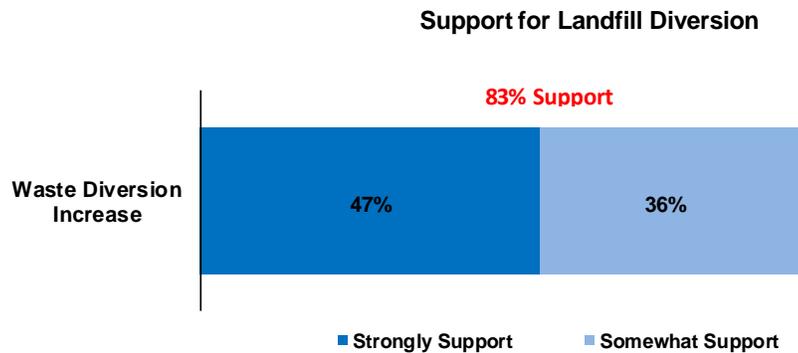


G4. How important is it that a community demonstrates care and protection of our environment in attracting and keeping young citizens to Winnipeg? Base: (n=1,560)

Landfill Diversion

Four out of five Winnipeg residents would support an increased 50% amount from the current 17% in diversion of waste from landfills (83%) even if it costs more today, as it saves money in the future.

- Young people aged 18-44 support this initiative (88%), along with recyclers (Blue Box 83%, other recycling 86%).
- As well, this is well supported by those who lived in Winnipeg five years or less (94%) and who have children at home (89%).



G5. The City is currently creating a Garbage and Recycling Master Plan to provide options to increase the amount of material kept out of the landfill and provide equitable services. Do you support the City's efforts to increase diversion of waste from the current 17% to 50% if it was to cost residents more today, but save money in the future? Base: (n=1,560)

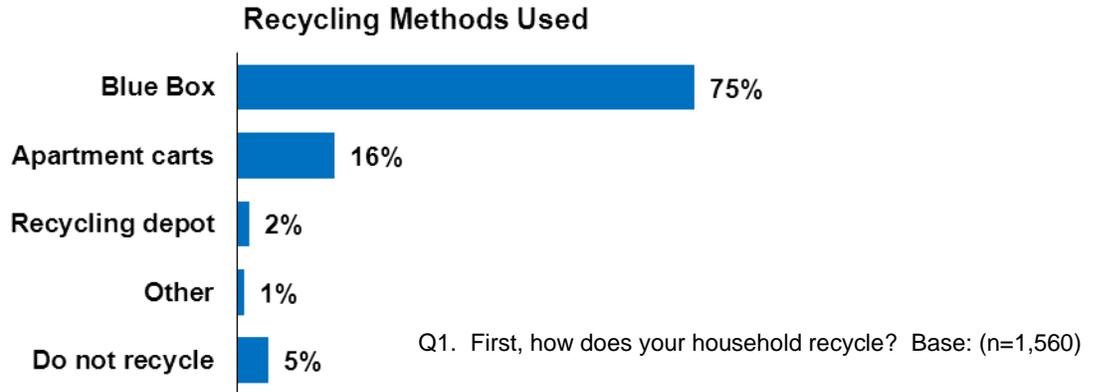
Recycling and Recovery

Recycling Participation and Methods

About three quarters of Winnipeg residents currently use Blue Boxes (75%), with over one in ten using apartment carts (16%). Overall, 95% of Winnipeg residents recycle.

Naturally, more of those living in single detached dwellings use the Blue Boxes (96%), along with many in condos/multi home units (57%). Home owners of any type are most likely to recycle in Blue Boxes (88%).

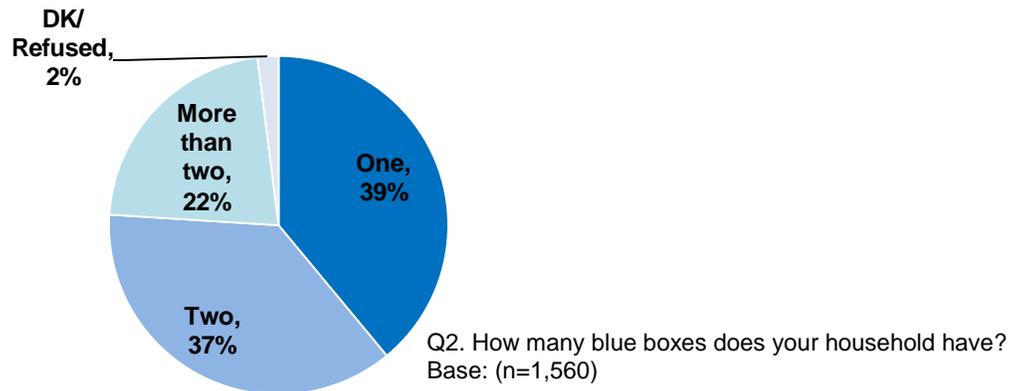
Those who are more likely not to recycle: have AutoBin (10%) or Apartment/condo garbage collection (8%), and do not compost (7%). They are also more likely to have an income of <\$30K, (10%), are renters (12%), and live in the Core area of Winnipeg (11%).



Blue Boxes

Two in five Blue Box respondents have just one blue box (39%).

- These tend to be renters (52%) and over age 65 (50%).
- Those with two Blue Boxes are younger at age 18-34 (46%), and living in a single detached dwelling (41%).
- The people with more than two blue boxes tend to have children under 15 at home (32%), have a higher income of \$80K+ (34%), and live in apartments (33%) or condo/multiplex (32%).



Recycling Options

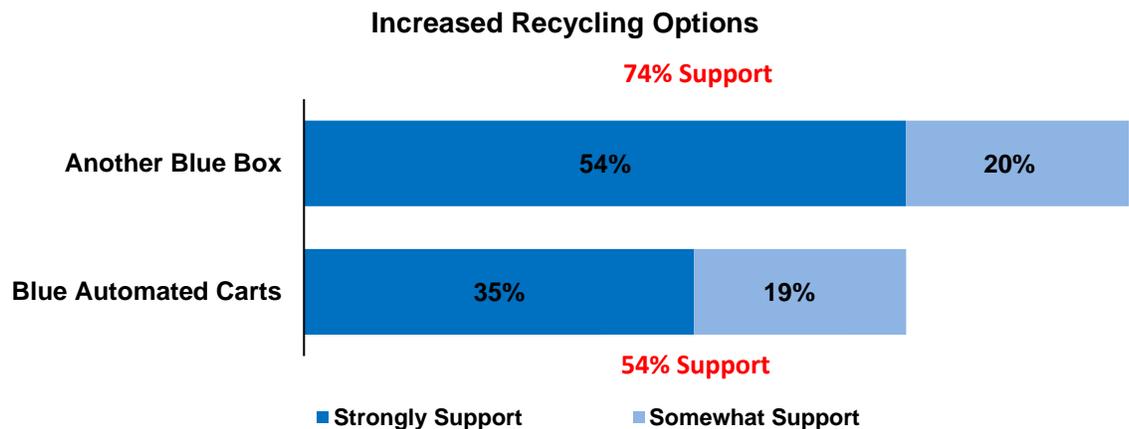
More people would support continuing with the current Blue Box service (74%). As well, about half support switching over to automated blue cart service.

Blue Box

- The natural choice for another Blue Box comes from those who use Blue Boxes already (76%), live in a single detached home (76%), and have curbside garbage pickup (78%).
- Also most of these residents supporting another Blue Box are composting (78%), and have children under 15 years old at home (80%). This resembles the demographics of those satisfied with Blue Box services already.
- For the those giving top box scores for their satisfaction with recycling, many support another Blue Box in top scores (67%) or are neutral (70%).

Blue Automated Carts

- Support for Blue Automated Carts comes more from the apartment dwellers (64%), are renters (65%) and mostly who use Automated carts for garbage (73%), apartment/condo/shared collection (57%), and AutoBins (54%).
- For those giving top box scores for their satisfaction with recycling, almost two-thirds support the option to switching over to Blue Automated Carts in (63%).
- Residents that support the automated blue carts are likely to be younger residents aged 18 –44 years old (71%), throw out 3 bags of garbage or more (64%), have children at home (68%), live in NW area of Winnipeg (68%) or Core region (60%). They also are more likely to use other means of recycling (62%), and are not composting (58%).
- For those who do not recycle, over half of them support the blue automated carts (59%), and another half of them support the idea to add another Blue Box (60%).

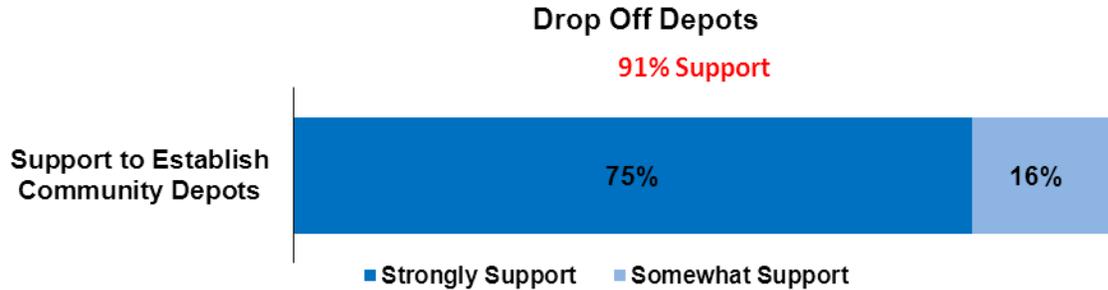


Q3. The City is considering two options to increase recycling. How much do you support... Base: (n=1,560)

Community Drop-off Depots

Drop-off depots are considered to be a good idea to nine out of ten residents (91%).

- Residents with children aged 15 or under (95%) strongly support this initiative.
- As well, those who make \$80K+ annually also support the idea to establish drop-off depots (96%).

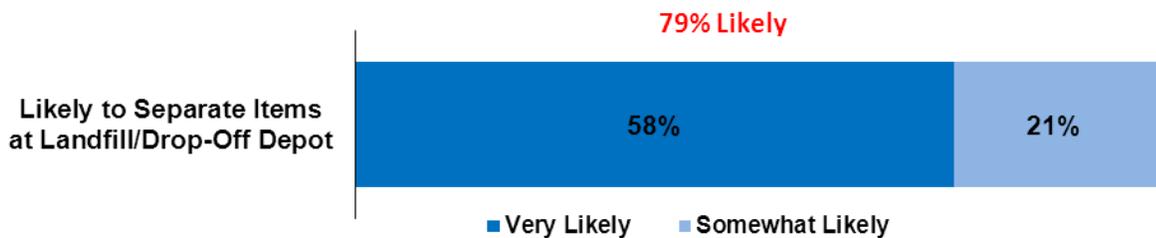


Q4. To help recover and reuse valuable items from the waste stream, the City is considering establishing community drop-off depots. These would collect items such as electronic waste, household hazardous waste, wood, and construction materials. How much do you support establishing such community depots? Base: (n=1,560)

Most Winnipeg residents are interested in the opportunity to pay less in dropping off items at the landfill/ drop-off depot by committing to separating those items (79%).

- Again, more residents with children aged 15 or under most strongly support this initiative (88%).
- Also, women support this more than men (61% vs. 54%), along with those age 18-64 (86%), recyclers (Blue Box 81%, other recycling 78%) and those with an income of \$80,000 or more (86%).
- People over 75 years old are not likely to support separating items themselves (30%), compared to the main population of the city who are not likely to support this idea (17%).

Separate Items to Pay Less at Landfill/Drop-Off Depot



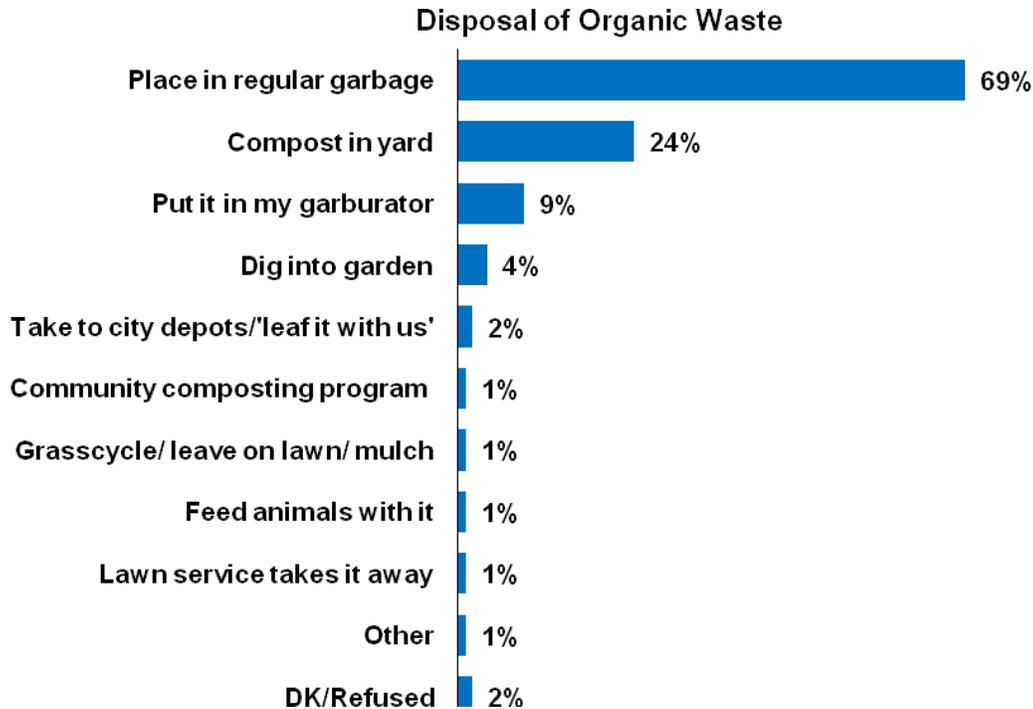
Q5. How likely would you be to separate your items at the landfill or community drop-off depot if it meant you would pay less? Base: (n=1,560)

Organic Waste/Composting

Disposal of Organic Waste

Over two-thirds of Winnipeg residents will dispose of their organic waste materials in the regular garbage (69%). Only one-quarter will compost their materials in the yard (24%).

- Apartment dwellers (84%) and those living in apartments/ multiplex homes (80%) tend to just put organic waste in the regular garbage.
- Many of those with AutoBin garbage collection (67%) or apartment/shared/condo garbage collection (82%) will put organic waste in the regular garbage.
- As well, this also happens more with those who don't recycle (91%) or use other recycling (82%), tend to throw out three or more bags of garbage per week (76%), are aged 18-44 (75%), and are renters (84%).
- Having a single detached home allows residents to compost it in the yard (36%) or dig it into the garden (6%).



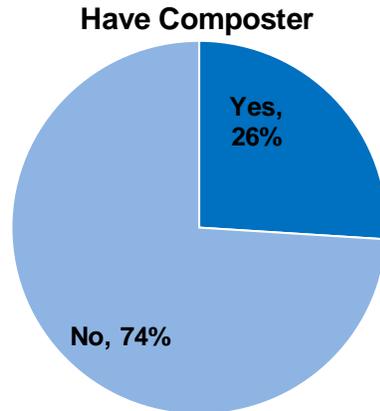
Q6. What do you normally do with organic waste materials? By organic waste I'm referring to things like vegetable peels, coffee grinds, grass and leaves and the like. Base: (n=1,560)

**Totals will exceed 100% due to multiple mentions.*

Composter Incidence

Only one-quarter of Winnipeg residents have and use a composter (26%). This is similar in size to the amount of people who compost organic waste in their yard (24%).

- Those who have and use composters tend to be living in a single detached dwelling (39%), own their home (33%), and have higher incomes (36%).
- Those who have composters tend to throw out one bag or less of garbage weekly (29%), and many are aged 45-64 (31%).
- The people with no composters tend to live in apartments (94%) or condo/multiplex (93%), along with being older (83% of those aged 75+). Also, these residents tend to throw out three or more bags of garbage per week (81%).



Q7 Does your household have and use a composter? Base: (n=1,560)

Yard Waste Options

Three-quarters of Winnipeg residents will support either of the potential schedules for yard waste collection (73%).

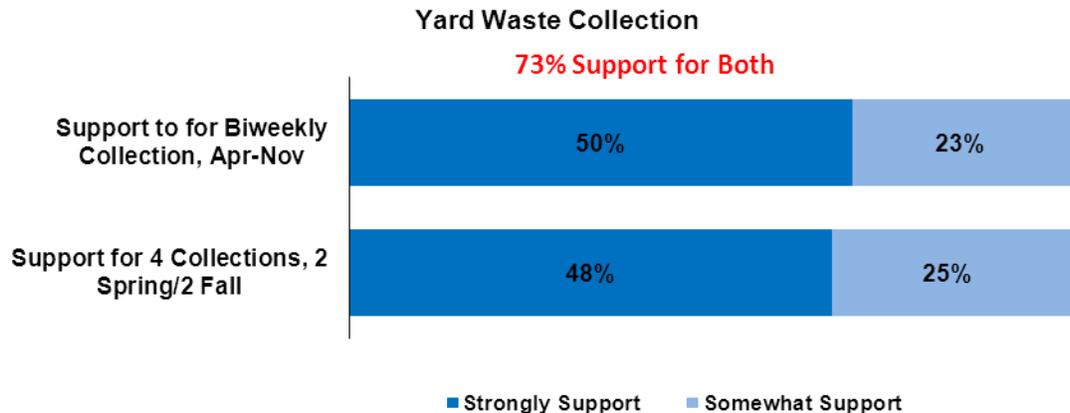
- Those with Automated cart collection most strongly support both the biweekly April to November schedule and also the option for four collections over spring/fall at equal levels (77%).

Biweekly from Apr-Nov

- Residents with children aged 15 or under most strongly support yard waste collection biweekly from April to November (80%), along with women (76%).
- As well, this biweekly program is more likely to be supported by those who live in NW part of Winnipeg (78%), and those who have lived in Winnipeg for 5 years or less (87%).

Four Collections, Two Spring/Two Fall

- Four collections are more likely to be supported by residents aged 18-34 (80%), have lived in Winnipeg for six to ten years (81%), as well as those who live in NW part of Winnipeg (76%),
- Those with AutoBins tend to support this idea of four collections equally to those with Autocart collection (77%).



Q8. The City is considering two options to collect yard waste, which would include items like leaves and grass clippings. How much do you support... Base (n=1,560)

Curbside Kitchen Waste Program

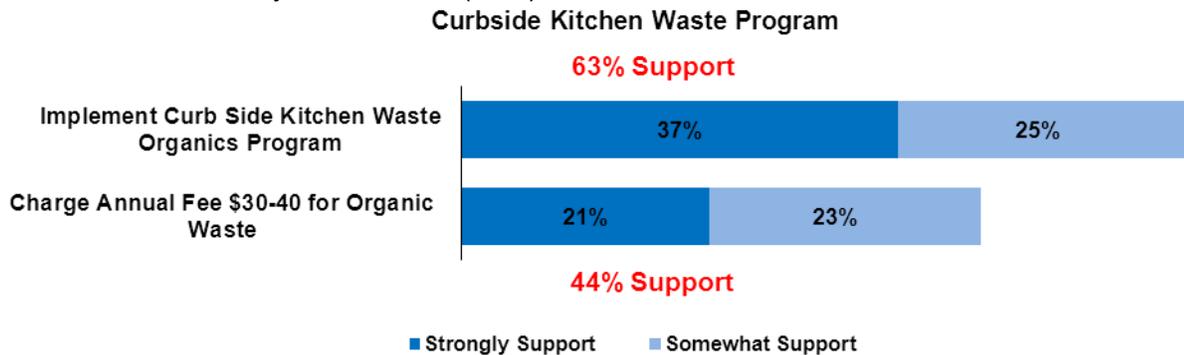
Almost two thirds of Winnipeg residents support the creation of a program for curbside kitchen waste collection (63%), but just under half of residents support paying an annual fee of \$30-40 to implement the program (44%).

Curbside Kitchen Waste Program Implementation

- Residents with children aged 15 or under most strongly support the idea of a curbside kitchen waste organics (71%), along with women (66%), and those aged 18-44 (75%).
- Many who support this program tend to live in apartments (70%), are renters (71%), and lived in Winnipeg five years or less (79%).
- Those who already use a composter support this program (66%) as well as those who don't use a composter support it (61%).
- One in ten residents are opposed to the kitchen waste program (15%).
- Opposers tend to be aged 65+ (21%), have a single detached dwelling (18%) and own their own home (17%). Most opposers have lived in Winnipeg for ten years or more (17%).

Charge Annual Fee for Kitchen Waste Program

- Paying an annual fee is most strongly supported by those aged 18-44 (55%) along with renters (52%) and apartment dwellers (51%).
- These residents tend to have children aged 15 or under (51%), throw out 1 bag or less of garbage weekly (48%), completed college/university (50%), and have lived in Winnipeg five years or less (57%).
- Those who already use a composter support the fee (48%) as well as those who don't use a composter support the fee(43%).
- A third of residents are opposed to paying the fee (36%).
- These opposers tend to be those with curbside collection for their garbage (39%), are men (39%), have a single detached dwelling (41%) and own their own home (40%). Most of opposers have lived in Winnipeg for ten years or more (37%).



Q9. After a yard waste program has been established, the City is considering implementing a curb side kitchen waste organics program. How supportive are you of such a program? Base (n=1,560)

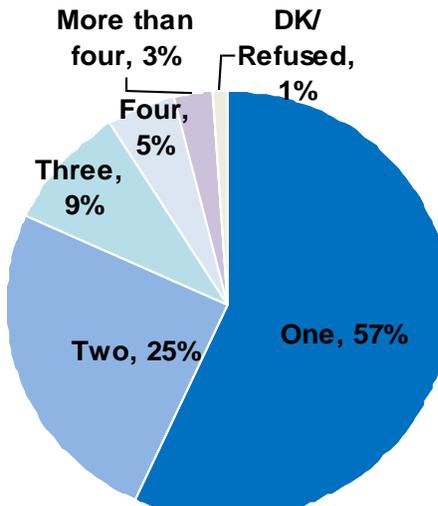
Q10. In order to support a curb side organics program an annual fee of \$30-40 per year may have to be charged. How supportive are you of such a fee, if it means it would help implement a curb side organics program? Base (n=1,560)

Garbage Collection

Garbage Quantity

Just over half of Winnipeg residents put out one or less garbage bag per week (57%).

- Most apartment dwellers put out one or less garbage bags per week (63%), along with women (66%), those having composters (65%), use other means of recycling (63%), and are 55+ years of age (66%).
- Many of these single garbage bags come from those who have lived in Winnipeg for 10 years or more (58%), have no children at home (63%), and live in SW or SE area of Winnipeg (61% both).
- Two bags per week come from many homeowners (27%), and those living in single detached homes (29%). Also, people age 18-44 tend to put out two bags per week (32%), as well as those with children under 15 at home (36%).
- Only three per cent of residents in Winnipeg put out four or more bags of garbage per week. Those on the high end producing four or more bags of garbage per week are likely to be those with AutoBin garbage pickup (8%), are 18-44 years of age (8%), with children under 15 at home (10%).

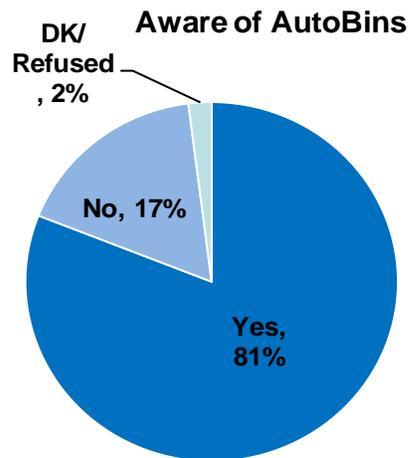


Q11. In an average week, how many how many bags of garbage do you put out – where a bag would be about the size of a green “Glad” bag? Base: (n=1,560)

AutoBins

Four out of five Winnipeg residents are aware of the community shared AutoBins (81%).

- Men are more aware than women of the AutoBins (84% vs. 79%), are living in a single detached dwelling (84%), and own their homes (83%).
- Many of these who are aware have lived in Winnipeg for 10 years or more (83%), are in the NW area of Winnipeg (85%), and are between the ages of 55-74 (85%).



Q12. Some residents in northwest Winnipeg currently use community shared AutoBins, also known as dumpsters, for their garbage. Are you aware that the City uses AutoBins? Base: (n=1,560)

Phase Out AutoBins/ Implement Auto Carts

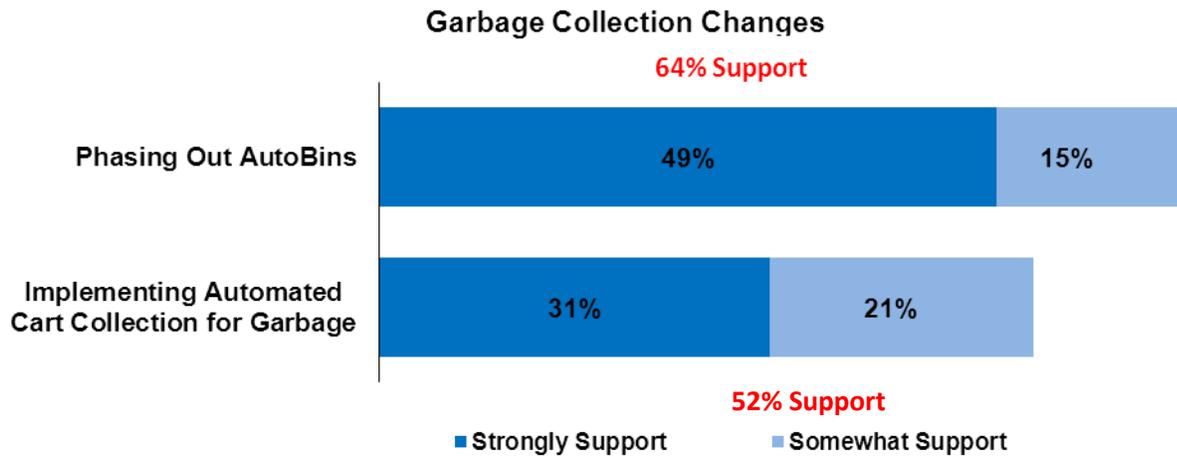
Nearly two thirds of Winnipeg residents support the idea of AutoBin garbage collection being phased out (64%). Just over half of residents support implementation of Automated carts instead of manual unlimited garbage collection (52%).

Phasing Out AutoBins

- Those who support phasing out AutoBins tend to have composters (71%), use a Blue Box (72%), live in a single detached dwelling (69%), are homeowners (66%), and are 45-64 (70%).
- Many who oppose phasing out this program tend to have AutoBin garbage collection (41%), live in NW (18%) or Core area of Winnipeg (27%).

Implementing Automated Cart Collection for Garbage

- Many of those who support the implementation of Automated carts throughout the City are those who already have Automated carts for garbage collection (79%), and are aged 18-44 (59%)
- As well, many supporters live in NW area of Winnipeg (73%), are men (56%), and have children aged 15 or less (60%).



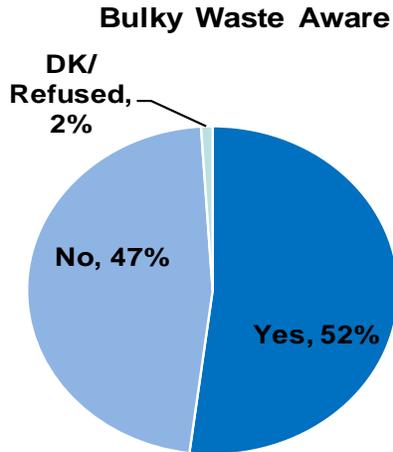
Q13. The cost for collecting garbage from AutoBins is twice as expensive as collecting garbage from the rest of Winnipeg. The City is considering phasing out the use of AutoBins. How supportive are you of the initiative? Base (n=1,560)

Q14. With the cost of manual unlimited garbage collection becoming more expensive than individual Automated Cart collection, the City is considering switching to Automated Carts throughout the city. Currently this Cart is used in parts of Northwest Winnipeg. How much do you support implementing automated cart collection for garbage? Base (n=1,560)

Bulky Waste Pickup

About half of Winnipeg residents are aware of the City’s bulky waste pickup service (52%).

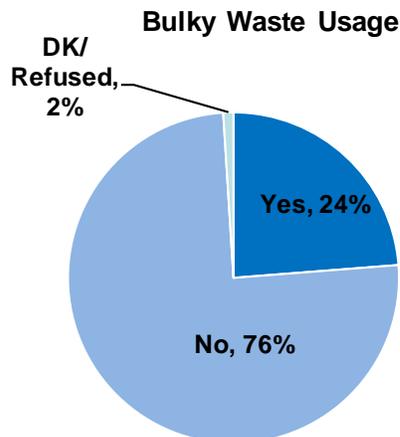
- Those aware of the service are most likely to be living in a single detached dwelling (56%), own their homes (55%), are aged 55-74 (60%), and have lived in Winnipeg for 10 years or more (54%).



Q15. Currently the City has a program that picks up bulky waste weekly on a call-in basis. Bulky waste is garbage that is larger or heavier than regular garbage you throw out, and includes such items as household furniture or mattresses. Are you aware that the City offers bulky waste? Base: (n=1,560)

Only one-quarter of the full market of Winnipeg residents surveyed have actually used the bulky waste pickup service (24%). For those aware residents, this jumps to 46 per cent. (i.e. in removing those respondents not aware of bulky waste pickup in Q15, those remainders are using and aware of the service = 372 users in 817 aware, or 46%).

- More users are living in a single detached dwelling (27%), own their homes (26%), are seniors aged 65-75 (33%), and have lived in Winnipeg for 10 years or more (25%).

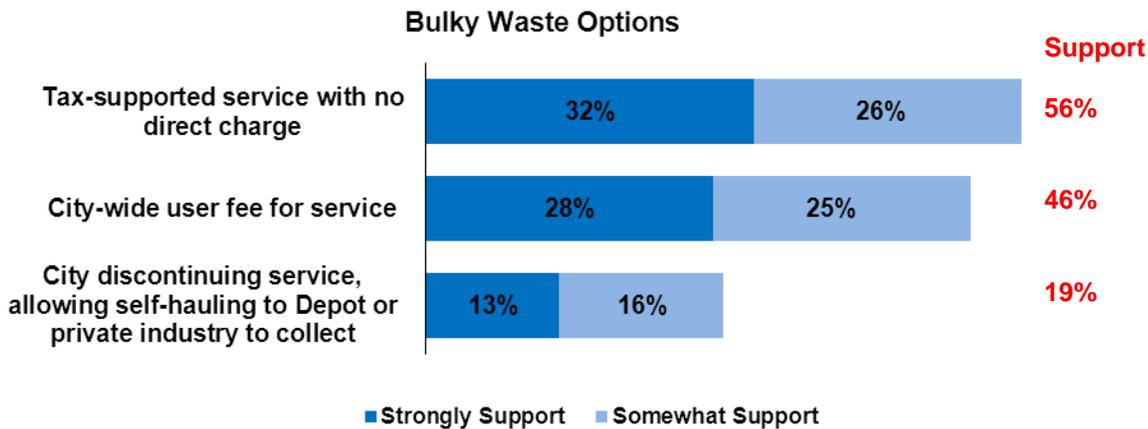


Q16. Have you ever used the City’s bulky waste pickup service? Base: (n=1,560)

Options for Collecting Bulky Waste

About half of Winnipeg residents support the idea of a city-wide user fee to pick up bulky waste materials (53%). Another half of residents support implementation of a program for a tax-supported service that carries no direct charge (58%). Just over one-quarter would support having the City as discontinuing the service for self-hauling or private industry (29%).

- Paying city-wide user fee is most strongly supported by those having garbage collection in apartment/condos/shared services (57%).
- Support for the city-wide fee is similar for those who have used bulky waste pickup (57%) vs. those who have not used it (52%).
- The idea of tax-supported services is well supported by renters (65%), those who throw out 3 or more bags of garbage (66%), and do not compost (61%).
- Support for tax-supported services is similar for those who have used bulky waste pickup (58%) vs. those who have not used it (58%).
- Men are most likely to support discontinuing the service for bulky waste altogether (34%), significantly higher than women (26%).
- As well, those aged 18-44 support the idea to cancel services for bulky waste (34%), along with those with curbside garbage collection (33%), put out one bag or less of garbage weekly (31%), and compost (33%).
- Those who support discontinuing service have lived in Winnipeg 5 years or less (42%), live in SE area of Winnipeg (38%), and have not used bulky waste pickup before (32%).



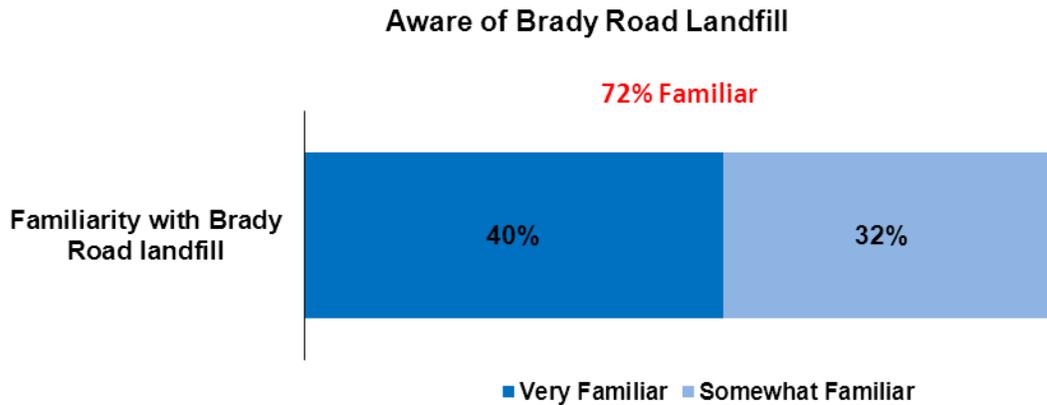
Q17. The City is considering three options for collecting bulky waste. How much do you support...?
Base (n=1,560)

Landfill Maintenance

Awareness of Brady Road Landfill

Almost three-quarters of Winnipeg residents have some familiarity with the Brady Road landfill site (72%).

- Again, more residents with curbside garbage collection know the Brady Road landfill (82%), along with homeowners (77%), men (80%), those who compost (80%), and lived in Winnipeg for 10 years or more (76%).
- More young people age 18-34 are likely to state they have never heard of it before (23%) compared to the average citizen overall (11%).
- Residents in the Core have least familiarity (55%).

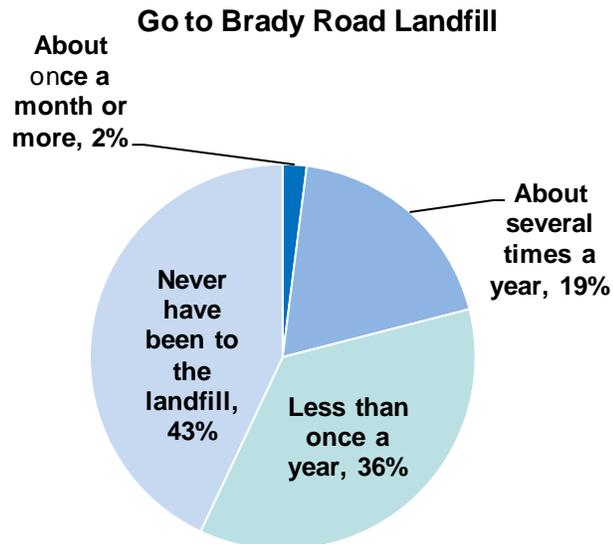


Q18. The City currently maintains a landfill site at Brady Road, which is located at the south end of the city. How familiar are you with Brady Road landfill? Are you...[? Base: (n=1,560)

Brady Road Usage

About one-fifth of Winnipeg residents will go to the Brady Road landfill several times a year (19%), with another third going less than once per year (36%). Two-fifths have never been there at all (43%).

- Those going several times a year are mostly in a single detached dwelling (26%), own their homes (24%), and are men (25%).
- Many of these have children at home (28%), live in SE part of Winnipeg (31%), are composting (24%), use a Blue Box (23%) and have curbside collection (29%).
- The importance of landfill maintenance is equal between those who have ever used Brady Road Landfill (69%) and those who have not (69%).
- The satisfaction with landfill maintenance is higher with those who have ever used Brady Road Landfill (31%) than for those who have not (25%).

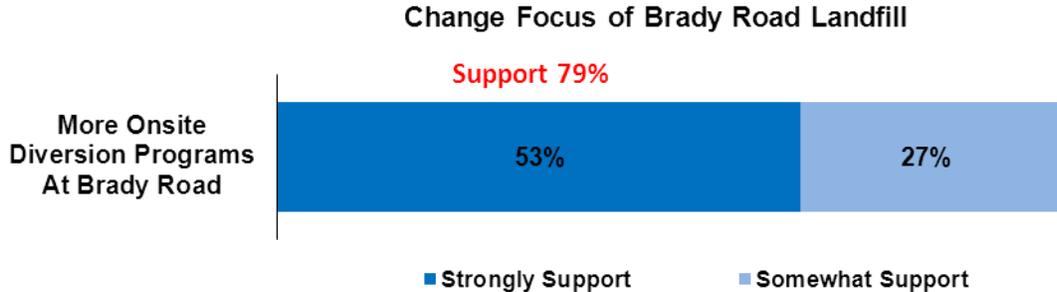


Q19. How often, if ever, do you go to Brady Road landfill? Do you go...? Base: (n=1,375)

Brady Landfill Opportunities

Over three-quarters of Winnipeg residents would readily support changing the focus of Brady Landfill for more onsite diversion programs, including hazardous waste, electronic waste, construction materials etc. (79%).

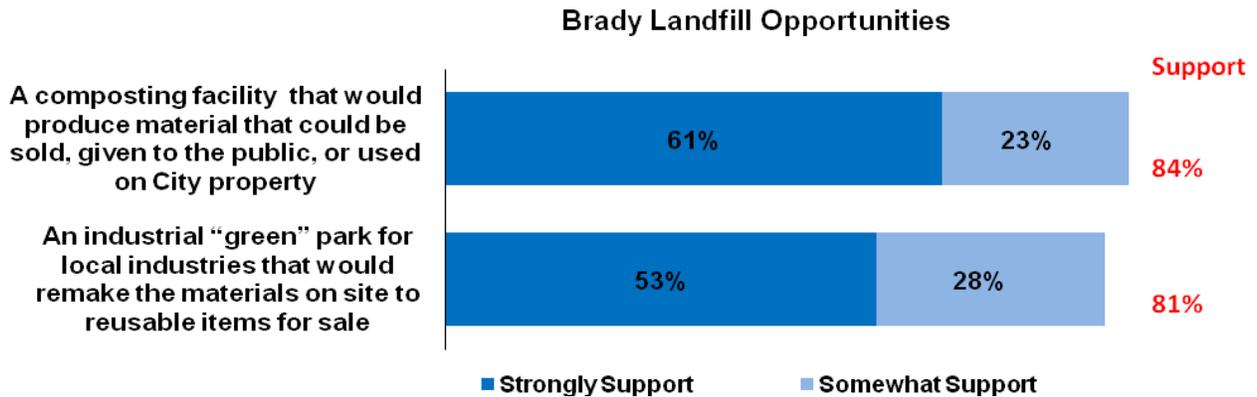
- This change is most supported by those having curbside collection (82%).



Q20. The City is considering changing the focus of Brady Landfill to allow for more onsite diversion programs, which could include a depot for hazardous waste, electronic waste, construction materials, reusing materials and the like. How supportive are you of such changes? Base (n=1,560)

Four out of five of Winnipeg residents support the two opportunities to be built at Brady Landfill: building a composting facility for material to sell/give to the public/or use on City property (84%); or an industrial ‘green’ park for local industry to remake materials on site to sell (81%).

- Both of these options are well supported across age categories, except in the upper range of those aged 75+ (73% support compost facility and 71% support green park facility).

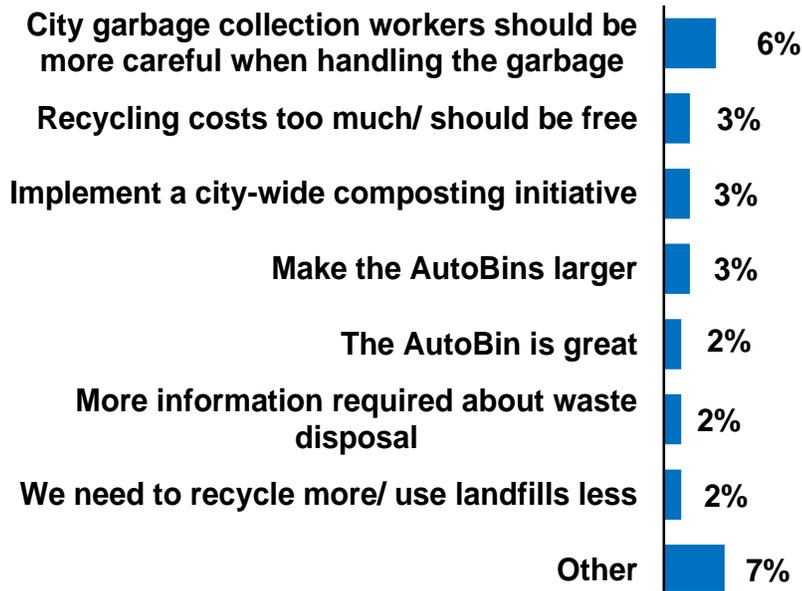


Q21. How much do you support the following opportunities to be built at Brady Landfill? Base (n=1,560)

Final Comments

The final question asked to residents allowed them the opportunity to comment on the overall programs in Winnipeg for garbage, recycling and organics. The majority had no comment or response to provide at all (65%).

Comments on Garbage Programs



Q22. Do you have any other comments regarding Winnipeg's garbage, recycling or organics programs? Base (n=1,560)

Some other comments were :

- Put the bins where you found them.
- I don't compost and I'm afraid it's gonna bring animals to the city.
- These AutoBins have contractors that use our AutoBin like it's a landfill, and they don't want to pay dumping fee, there has to be a way of policing.

Appendix A: Survey

**Comprehensive Waste Management Plan – Phase 2
Survey Questions (Field version)**

Good morning (afternoon, evening), my name is _____. I am calling from _____. We are calling on behalf of the City of Winnipeg to do a short survey about how the City manages garbage. This is in no way a sales related call.

We are conducting this survey in accordance with the Freedom of Information and Protection of Privacy Act.

If you have any concerns or questions about the survey you can call 311, open 24 hours every day.

May I please speak to someone aged 18 or older who has some responsibility for paying bills in your household?

- [IF CURRENT INDIVIDUAL NOT 18] May I speak with someone who is?
REPEAT INTRODUCTION
- No one qualified or available. **THANK AND TERMINATE**

[WHEN PERSON ON THE PHONE]

SCREENER

A. Please indicate your 6-digit postal code. This information is used in order to ensure the survey represents people living in all areas of Winnipeg.

[FIRST THREE DIGITS MUST FALL INTO LIST]

R2C	R3G	(DK/NS)
R2G	R3H	THANK AND
R2H	R3J	TERMINATE
R2J	R3K	
R2K	R3L	
R2L	R3M	
R2M	R3N	
R2N	R3P	
R2P	R3R	
R2R	R3S	
R2V	R3T	
R2W	R3V	
R2X	R3W	
R2Y	R3X	
R3A	R3Y	
R3B	Other (Specify)	
R3C	THANK AND	
R3E	TERMINATE	

B. Gender (DO NOT ASK – WATCH QUOTAS)

- Male
- Female

C. What type of dwelling you currently live in:

- Single detached house
- Apartment
- Duplex or Multiplex
- Condominium
- Other (Specify)
- (DK/NS) **THANK AND TERMINATE**

OVERALL

G1. How is your garbage collected? [TRACK RESPONSES FOR QUOTAS]

- Individual curbside manual01 ->G1a
- Back lane shared AutoBin02 ->G1b
- Automated carts03 ->G1c
- Wheelbarrow carts in AutoBin areas04 ->G1d
- Apartment/Condo/Shared05 ->cross with C.Dwelling
- (DK/NS).....99 **THANK AND TERMINATE**

G1a. By Individual curbside manual collection, do you mean that you put out your own garbage bags or cans at the curb or back lane, and collection crews manually throw it into the truck?

- Yes.....01 CONTINUE
- No.....02 Go back to G1

G1b. By AutoBin, do you mean the large beige metal containers that are shared by several residents, located in various locations down the back lane?

- Yes.....01 CONTINUE
- No.....02 Go back to G1

G1c. By Automated Carts, do you mean the black plastic upright wheeled containers with a lid that are placed at the curb or back lane on garbage day and picked up by a truck with automated arms?

- Yes.....01 CONTINUE
- No.....02 Go back to G1

G1d. By Roll-out carts in AutoBin areas, do you mean the wheelbarrow style container with two flap lids that you received instead of using a shared AutoBin?

- Yes.....01 CONTINUE
- No.....02 Go back to G1

G2. I'm going to name some topics and I'd like you to tell me how important each is to you. Let's use a 10-point scale where 1 means this is "not important at all" to you and 10 means it is "very important". How important is...(RANDOMIZE)

		Not important at all								Very important			DK/NS
		1	2	3	4	5	6	7	8	9	10		
G2a.	Garbage collection	1	2	3	4	5	6	7	8	9	10	99	
G2b.	Recycling collection	1	2	3	4	5	6	7	8	9	10	99	
G2c.	Organics/composting program	1	2	3	4	5	6	7	8	9	10	99	
G2d.	Landfill maintenance	1	2	3	4	5	6	7	8	9	10	99	

G3. Now I'd like to read those same topics again and I'd like you to tell me how satisfied you are with each of them. Again, we'll use a 10-point scale where 1 means that you are "not at all satisfied" and 10 means that you are "very satisfied". How satisfied are you with...(RANDOMIZE)

		Not at all satisfied								Very satisfied			DK/NS
		1	2	3	4	5	6	7	8	9	10		
G3a.	Garbage collection	1	2	3	4	5	6	7	8	9	10	99	
G3b.	Recycling collection	1	2	3	4	5	6	7	8	9	10	99	
G3c.	Organics/composting program	1	2	3	4	5	6	7	8	9	10	99	
G3d.	Landfill maintenance	1	2	3	4	5	6	7	8	9	10	99	

G4. How important is it that a community demonstrates care and protection of our environment in attracting and keeping young citizens to Winnipeg?

- Very important01
- Somewhat important02
- Neither important nor unimportant.....03
- Somewhat unimportant.....04
- Not at all important05
- (DK/NS).....99

G5. The City is currently creating a Garbage and Recycling Master Plan to provide options to increase the amount of material kept out of the landfill and provide equitable services. Do you support the City’s efforts to increase diversion of waste from the current 17% to 50% if it was to cost residents more today, but save money in the future?

- Strongly support.....01
- Somewhat support02
- Somewhat oppose03
- Strongly oppose04
- (DK/NS).....99

Several options are being considered as part of the process of creating a Garbage and Recycling Master Plan. Throughout the next portion of the survey we will be asking you your opinions on the options the City is considering.

RECYCLING AND RECOVERY

1. First, how does your household recycle?

- Blue box01
- Recycling depot.....02 **(SKIP to Q.3)**
- Apartment carts.....03 **(SKIP to Q.3)**
- Do not recycle.....04 **(SKIP to Q.3)**
- Other (specify)98 **(SKIP to Q.3)**
- (DK/NS).....99 **(SKIP to Q.3)**

2. How many blue boxes does your household have?

- One.....01
- Two.....02
- More than two.....03
- (DK/NS).....99

3. The City is considering two options to increase recycling. How much do you support...

(RANDOMIZE – READ OPTIONS FIRST)

		Strongly Support	Somewhat Support	Neutral	Somewhat Oppose	Strongly Oppose	DK/NS
3a.	Blue Automated Carts, which would be the same as the garbage carts implemented in some areas of the city	1	2	3	4	5	99
3b.	Continue with blue box service, receiving another blue box	1	2	3	4	5	99

4. To help recover and reuse valuable items from the waste stream, the City is considering establishing community drop-off depots. These would collect items such as electronic waste, household hazardous waste, wood, and construction materials. How much do you support establishing such community depots?

Strongly support.....	01
Somewhat support	02
Neutral	03
Somewhat oppose	04
Strongly oppose	05
(DK/NS).....	99

5. How likely would you be to separate your items at the landfill or community drop-off depot if it meant you would pay less?

Very likely	01
Somewhat likely	02
Not very likely	03
Not likely	04
(DK/NS).....	99

ORGANIC WASTE/COMPOSTING

6. What do you normally do with organic waste materials? By organic waste I’m referring to things like vegetable peels, coffee grinds, grass and leaves and the like. **(DO NOT READ – SELECT UP TO THREE MENTIONS)**

Place in regular garbage.....	01
Take to city depots/“leaf it with us”.....	02
Compost in yard	03
Dig into garden	04
Feed animals with it.....	05
Put it in my garburator.....	06
Grasscycle / leave on lawn / mulch	07
Curb-side composting program	08
Lawn service takes it away	09
Community composting program	10
Other (specify)	98
(DK/NS).....	99

7. Does your household have and use a composter?

Yes.....	01
No.....	02
(DK/NS).....	99

8. The City is considering two options to collect yard waste, which would include items like leaves and grass clippings. How much do you support... **(RANDOMIZE – READ OPTIONS FIRST)**

		Strongly Support	Somewhat Support	Neutral	Somewhat Oppose	Strongly Oppose	DK/NS
8a.	Biweekly collection, from April to November	1	2	3	4	5	99
8b.	Four collections, twice in spring and twice in fall	1	2	3	4	5	99

9. After a yard waste program has been established, the City is considering implementing a curb side kitchen waste organics program. How supportive are you of such a program?

- Strongly support.....01
- Somewhat support02
- Neutral03
- Somewhat oppose04
- Strongly oppose05
- (DK/NS).....99

10. In order to support a curb side organics program an annual fee of \$30-40 per year may have to be charged. How supportive are you of such a fee, if it means it would help implement a curb side organics program?

- Strongly support.....01
- Somewhat support02
- Neutral03
- Somewhat oppose04
- Strongly oppose05
- (DK/NS).....99

GARBAGE

11. In an average week, how many bags of garbage do you put out – where a bag would be about the size of a green “Glad” bag?

- One or less01
- Two.....02
- Three03
- Four04
- More than four05
- (DK/NS).....99

12. Some residents in northwest Winnipeg currently use community shared AutoBins, also known as dumpsters, for their garbage. Are you aware that the City uses AutoBins?

- Yes.....01
- No.....02
- (DK/NS).....99

13. The cost for collecting garbage from AutoBins is twice as expensive as collecting garbage from the rest of Winnipeg. The City is considering phasing out the use of AutoBins. How supportive are you of the initiative?

- Strongly support.....01
- Somewhat support02
- Neutral03
- Somewhat oppose04
- Strongly oppose05
- (DK/NS).....99

14. With the cost of manual unlimited garbage collection becoming more expensive than individual Automated Cart collection, the City is considering switching to Automated Carts throughout the city. Currently this Cart is used in parts of Northwest Winnipeg. How much do you support implementing automated cart collection for garbage?

- Strongly support.....01
- Somewhat support02
- Neutral03
- Somewhat oppose03
- Strongly oppose04
- (DK/NS).....99

15. Currently the City has a program that picks up bulky waste weekly on a call-in basis. Bulky waste is garbage that is larger or heavier than regular garbage you throw out, and includes such items as household furniture or mattresses. Are you aware that the City offers bulky waste pickup?

- Yes.....01
- No.....02
- (DK/NS).....99

16. Have you ever used the City’s bulky waste pickup service?

- Yes.....01
- No.....02
- (DK/NS).....99

17. The City is considering three options for collecting bulky waste. How much do you support... **(RANDOMIZE – READ OPTIONS FIRST)**

		Strongly Support	Somewhat Support	Neutral	Somewhat Oppose	Strongly Oppose	DK/NS
17a.	City-wide User fee for service	1	2	3	4	5	99
17b.	Tax supported service with no direct charge	1	2	3	4	5	99
17c.	City discontinuing service, allowing self-hauling to Depot or private industry to collect	1	2	3	4	5	99

LANDFILL MAINTENANCE

18. The City currently maintains a landfill site at Brady Road, which is located at the south end of the city. How familiar are you with Brady Road landfill? Are you...[READ]

- Very familiar01
- Somewhat familiar02
- Not very familiar.....03
- Have never heard of04 **(SKIP to Q.20)**
- (DK/NS).....99 **(SKIP to Q.20)**

19. How often, if ever, do you go to Brady Road landfill? Do you go...[READ]

- About once a month or more.....01
- About several times a year02
- Less than once a year03
- Never have been to the landfill04
- (DK/NS).....99

20. The City is considering changing the focus of Brady Landfill to allow for more onsite diversion programs, which could include a depot for hazardous waste, electronic waste, construction materials, reusing materials and the like. How supportive are you of such changes?

- Strongly support.....01
- Somewhat support02
- Neutral03
- Somewhat oppose04
- Strongly oppose05
- (DK/NS).....99

21. How much do you support the following opportunities to be built at Brady Landfill?

(RANDOMIZE)

		Strongly Support	Somewhat Support	Neutral	Somewhat Oppose	Strongly Oppose	DK/NS
21a.	A composting facility that would produce material that could be sold, given to the public, or used on City property	1	2	3	4	5	99
21b.	An industrial “green” park for local industries that would remake the materials on site to reusable items for sale	1	2	3	4	5	99

FINAL THOUGHTS

22. Do you have any other comments regarding Winnipeg’s garbage, recycling or organics programs?

<OPEN RESPONSE>

DEMOGRAPHICS

These final questions are used for statistical purposes only.

- 23. Do you rent or own your current place of residence?
 - Rent 01
 - Own..... 02
 - (DK/NS) 99

- 24. Do you have any children aged 15 years or younger in your home?
 - Yes..... 01
 - No 02
 - (DK/NS) 99

- 25. How long have you lived in Winnipeg?
 - Less than 2 years 01
 - 2-5 years 02
 - 6-10 years 03
 - More than 10 years 04
 - Prefer not to answer 99

- 26. Which is your age group?
 - 18-24 years 01
 - 25-34 years 02
 - 35-44 years 03
 - 45-54 years 04
 - 55-64 years 05
 - 65+ years 06
 - Prefer not to answer 99

- 27. What is the highest level of schooling you have obtained?
 - Grade school / Some high school 01
 - Complete high school..... 02
 - Some post-secondary 03
 - Completed college or university 04
 - Prefer not to answer 99

- 28. Which of the following categories best describes your family income? That is, the total income before taxes of all persons in your household?
 - Under \$10,000 01
 - \$10,000 to \$29,999 02
 - \$30,000 to \$59,999 03
 - \$60,000 to \$79,999 04
 - \$80,000 or over 05
 - Prefer not to answer 06

Thank you very much for your time and cooperation