



GODBE RESEARCH
Gain Insight

RETHINK WASTE

2012 Residential Customer Satisfaction Survey

Topline Report

n=2,450

16-minutes

Hybrid Sample

May 15, 2012

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SURVEY METHODOLOGY

Godbe Research was commissioned by Rethink Waste to conduct a survey to assess awareness and customer satisfaction. The survey was also designed to: (a) gauge awareness and satisfaction with the CartSMART program, recycling, composting, and household hazardous waste collection services; and (b) assess the overall satisfaction with Rethink Waste's customer service.

Survey Methodology

Godbe Research conducted a total of 2450 interviews representing approximately 296,277 adults age 18 and older within the Rethink Waste jurisdiction. Included in this sample was a subsample of approximately 183,640 voters. Additionally, in order to eliminate renters and condo owners whose building maintenance staff people are responsible for setting out the carts, respondents were screened to eliminate these groups. The error rate for the study is plus or minus 2.0%. Interviews were conducted from April 21 through May 6, 2012. The average interview time was approximately 16 minutes.

Once collected, the sample of voters was compared with the respective voter population within the selected RethinkWaste jurisdictions to examine possible differences between the demographics of the sample and the actual universe of voters. The data were weighted to correct these differences, and the results presented are representative of the population characteristics of the jurisdiction in terms of demographics.

Questionnaire Methodology

To avoid the problem of systematic position bias, where the order in which a series of questions is asked systematically influences the answers, several questions in the survey were randomized such that the respondents were not consistently asked the questions in the same order. The series of items in Questions 13, 18 and 23 were randomized to avoid such position bias.

Mean Scores and Rounding

In addition to the percentage breakdown of responses to each question, results for the questions relating to frequency of use for green cart (Q13) and overall satisfaction (Q23) include mean scores. For example, to derive the frequency of use of the green cart (Q13), a number value is first assigned to each response category (in this case, "All the Time/Regularly" = +3, "Sometimes" = +2, "Hardly Ever" = +1, and "Never" = 0. The number values that correspond to respondents' answers were then averaged to produce a final score that reflects the overall score for that issue. The resulting mean score makes the interpretation of the data considerably easier. Responses of "Don't Know" (DK/NA) were not included in the calculations of the mean scores for any question.

Conventional rounding rules are used in this report (.5 or above was rounded up, and .4 or below was rounded down). As a result, the percentages may not add up to 100 percent.

OVERALL AWARENESS & SATISFACTION

1. Do you know the name of the company that provides your recycle, compost and garbage services?

RethinkWaste	1.9%
Recology	75.1%
South Bayside Waste Management Authority or SBWMA	1.9%
Allied Waste	3.5%
BFI	3.9%
My city or town	1.5%
Green Waste	.1%
Other	.4%
DK/NA	11.9%

2. Do you think that your recycle, compost and garbage services are a good value for the money you pay?

Yes, good value	67.0%
Mixed opinions	14.3%
No, not a good value	11.8%
DK/NA	6.9%

CartSMART AWARENESS & SATISFACTION

3. As you may know, the new CartSMART program began in January 2011. This program includes a black garbage cart, a blue recycling cart, and a green compost cart. Generally speaking, are you satisfied or dissatisfied with the CartSMART program? Is that very or somewhat [satisfied/dissatisfied]?

Very satisfied	64.6%
Somewhat satisfied	23.6%
Neither satisfied nor dissatisfied	3.8%
Somewhat dissatisfied	4.3%
Very dissatisfied	2.1%
DK/NA	1.5%

4. [If Q3 = Somewhat dissatisfied or very dissatisfied, ask:] Why is that

Quality of program	15.9%
Cost of program	41.4%
Carts are too big	11.1%
Carts are too small	12.7%
Confused	5.0%
Smell	.5%
Other	12.9%
DK/NA	.5%

5. Generally speaking, how full is your garbage cart, that is the black cart, on the day it is picked up by Recology? Would you say it is:

Completely full	43.7%
Three quarters full	29.9%
Half full	18.4%
One quarter full	4.7%
Less than one-quarter full	1.3%
DK/NA	1.9%

RECYCLING AWARENESS & SATISFACTION

6. As you know, the new CartSMART program began in January 2011 and it includes a recycling cart. Generally speaking, are you satisfied or dissatisfied with the recycling program? Is that very or somewhat [satisfied/dissatisfied]?

Very satisfied	73.2%
Somewhat satisfied	19.3%
Neither satisfied nor dissatisfied	3.0%
Somewhat dissatisfied	2.5%
Very dissatisfied	1.3%
DK/NA	.7%

7. [If Q6 = Somewhat dissatisfied or very dissatisfied, ask:] Why is that?

Quality of program	7.9%
Cost of program	36.5%
Carts are too big	14.7%
Frequency of program	11.7%
Carts are too small	11.1%
Confused	2.9%
Other	14.6%
DK/NA	.7%

8. How frequently do you set out your recycling for pick up?

Weekly	84.9%
Every other week	11.6%
Monthly	2.6%
Don't recycle	.2%
Don't have recycling	.1%
DK/NA	.7%

9. Generally speaking, how full is your recycling cart, that is the blue cart, on the day it is picked up by Recology? Would you say it is:

Completely full	39.3%
Three quarters full	35.4%
Half full	20.1%
One quarter full	3.4%
Less than one-quarter full	.4%
DK/NA	1.4%

10. Would you say that the frequency of your recycling pick up meets your needs, is not picked up often enough, or is picked up too often?

Meets your needs	89.5%
Is not picked up often enough	4.8%
Is picked up too often	4.9%
DK/NA	.9%

COMPOSTING AWARENESS & SATISFACTION

11. As you know the new CartSMART program began in January 2011. This service includes a compost cart and a kitchen pail. Generally speaking, are you satisfied or dissatisfied with the composting program? Is that very or somewhat [satisfied/dissatisfied]?

Very satisfied	61.8%
Somewhat satisfied	20.5%
Neither satisfied nor dissatisfied	7.9%
Somewhat dissatisfied	3.3%
Very dissatisfied	1.7%
DK/NA	4.9%

12. [If Q11 = Somewhat dissatisfied or very dissatisfied, ask:] Why is that

Quality of the service	12.5%
Cost of the service	20.4%
Carts are too big	10.4%
Too messy/dirty/when add food scraps/smell	31.4%
Carts are too small	9.1%
Confused	1.5%
Other	13.0%
DK/NA	1.6%

13. Now I'm going to read a list of compostable items that can go into the green cart. Here's the (first / next) one _____, do you put this kind of material in your in your green, compost cart all the time, sometimes, hardly ever, or never?

	Mean Score	All the Time/ Regularly	Sometimes	Hardly Ever	Never	DK/NA
A. Food and table scraps	2.08	54.0%	17.7%	4.7%	20.7%	3.0%
B. Pizza boxes	1.64	39.3%	15.3%	8.0%	32.9%	4.4%
C. Food and beverage soiled paper plates, cups, napkins and towels	1.95	45.7%	22.0%	7.0%	22.0%	3.3%
D. Yard clippings	2.50	70.7%	12.5%	3.1%	9.9%	3.8%

Computation of Mean Scores:

"All the Time/Regularly" = +3, "Sometimes" = +2, "Hardly Ever" = +1, and "Never" = 0.

14. [If Q13A TO D = Hardly ever or never, ask:] Why don't you put < items from Q13 > in your green compost cart?

A. Food and table scraps	
Didn't know I could	25.8%
Too messy	29.5%
Rodent problems	9.7%
Don't use them	5.0%
Do my own composting/garbage disposal	7.1%
Inconvenient	1.5%
Give it to Pets/Dogs	1.0%
Put in regular garbage	5.2%
Confused	.1%
Don't have green cart	5.6%
Other	2.5%
DK/NA	6.9%

B. Pizza boxes	
Didn't know I could	46.2%
Too messy	6.6%
Rodent problems	3.2%
Don't eat pizza/don't buy it	22.6%
Has own composting	.4%
Inconvenient	.1%
Recycle/blue cart	5.6%
Don't use it/not needed	2.3%
Put in regular garbage	.4%
Confused	.0%
Don't have green cart	3.1%
Other	2.1%
DK/NA	7.4%

C. Food and beverage soiled paper plates, cups, napkins and towels	
Didn't know I could	46.4%
Too messy	12.7%
Rodent problems	6.4%
Don't use them	11.1%
Put it in my own compost	.9%
Inconvenient	.8%
Put in recycle/blue cart	2.9%
Put in regular garbage	3.8%
Confused	.6%
Don't have green cart	4.3%
Other	1.6%
DK/NA	8.5%

D. Yard clippings	
Didn't know I could	23.3%
Too messy	7.8%
Rodent problems	1.9%
Don't have a yard/no need	25.8%
Have my own compost	5.3%
Gardner/HOA	5.4%
Confused	.0%
Don't have green cart	8.3%
Other	4.3%
DK/NA	17.9%

15. How frequently do you set out your compost cart for pick up?

Weekly	66.0%
Every other week	18.9%
Monthly	5.8%
Don't compost	3.7%
Don't have composting	2.6%
DK/NA	3.1%

16. Generally speaking, how full is your compost cart, that is the green cart, on the day it is picked up by Recology? Would you say it is:

Completely full	29.3%
Three quarters full	29.0%
Half full	23.8%
One quarter full	7.1%
Less than one-quarter full	1.8%
DK/NA	9.0%

17. Would you say that the frequency of your compost cart pick up meets your needs, is not picked up often enough, or is picked up too often?

Meets your needs	86.3%
Is not picked up often enough	2.2%
Is picked up too often	4.1%
DK/NA	7.4%

18. Now I'm going to read a list of additional services that are available to you at no additional cost. Here's the (first / next) one _____. Did you know you have this program as part of your CartSMART services?

	Yes, Aware	No, Not Aware	DK/NA
A. Twice a year bulky item pick-up	77.7%	21.4%	.9%
B. Curbside household battery and cell phone recycling	56.4%	42.9%	.7%
C. Curbside used motor oil and oil filter recycling	52.1%	46.3%	1.6%
D. Compost give away	34.4%	61.5%	4.0%
E. Document shredding events	27.0%	72.2%	.8%

19. Now that we have discussed the topic in more detail, do you think that your recycling, composting and garbage services are a good value for the money you pay?

Yes, good value	74.0%
Mixed opinions	12.1%
No, not a good value	10.0%
DK/NA	3.9%

CUSTOMER SERVICE

20. Generally speaking, are you satisfied or dissatisfied with the overall quality of the service you receive from Recology? Is that very or somewhat [satisfied/dissatisfied]?

Very satisfied	72.0%
Somewhat satisfied	19.9%
Neither satisfied nor dissatisfied	2.9%
Somewhat dissatisfied	3.5%
Very dissatisfied	1.5%
DK/NA	.3%

21. In the last 12 months, have you contacted Recology for any reason?

Yes	29.9%
No	69.6%
DK/NA	.5%

22. [If Q21 = Yes, ask:] Why did you contact Recology?

Report missed or skipped pick up	22.1%
Obtain information about pick-up of large or bulky items/household appliances	17.3%
Get different sized cart	10.4%
Report a problem (non-specific)	8.1%
Report a billing problem	5.2%
Obtain information about disposing of toxics or disposing of household hazardous waste	4.1%
Obtain information about composting	3.8%
Carts not put back properly	3.2%
Obtain information about cart placement	3.0%
Obtain information about recycling	2.9%
Obtain information about recycling of electronics including: TV, computer monitors, computers, cell phones, and batteries disposal	2.9%
Need a special/extra pick up	2.7%
Start/cancel service due to moving/vacation	1.6%
Missing cart/container	1.6%

Report truck problem	1.0%
General questions/paying bills	.6%
Report a spill	.6%
Obtain information about disposing of used motor oil	.4%
Other	7.8%
DK/NA	1.0%

23. Overall, are you satisfied or dissatisfied with Recology in terms of _____?
Would that be very <satisfied/dissatisfied> or somewhat <satisfied/dissatisfied>?

	Mean Score	Very Sat.	Smwt. Sat.	Neither Sat. nor Dissat.	Smwt. Dissat.	Very Dissat.	DK/NA
A. Getting your problem resolved or question answered	1.40	67.5%	18.3%	1.7%	6.0%	4.9%	1.6%
B. The customer service you received	1.53	70.8%	18.5%	1.9%	4.5%	2.6%	1.8%
C. The time you were on hold	1.41	60.3%	18.9%	8.3%	3.4%	2.4%	6.7%
D. The service you receive from the drivers who pick up from your home	1.39	65.2%	18.0%	5.7%	6.1%	2.9%	2.1%
E. How quickly your problem was resolved	1.36	67.4%	15.7%	2.2%	4.9%	6.9%	2.9%

Computation of Mean Scores:

"Very Satisfied" = +2, "Somewhat Satisfied" = +1, "Neither Satisfied nor Dissatisfied" = 0, "Somewhat Dissatisfied" = -1, and "Very Dissatisfied" = -2.

24. How far apart do you set your carts out for pick up?

About a half foot apart	13.1%
About one foot apart	30.8%
About two feet apart	37.8%
Right next to each other	13.6%
DK/NA	4.7%

25. How soon after your carts have been emptied do you put them away?

Immediately	20.2%
Same day	72.6%
Next day	3.9%
Always keep them out/don't put them away	1.7%
I have backyard service	.4%
DK/NA	1.3%

HOUSEHOLD HAZARDOUS WASTE COLLECTION

[Asked only of Residents of Belmont, East Palo Alto, Foster City, Hillsborough, Menlo Park, San Carlos, City of San Mateo, West Bay Sanitary District]

26. Before today, have you seen, heard or read anything about the Household Hazardous Waste Door-to-Door Collection program, and if so, have you used the program?

Yes, aware and used program	9.8%
Yes, aware, not used program	23.4%
No, not aware	65.9%
DK/NA	.9%

27. [If Q26 = Yes, aware and used program, ask:] Generally speaking, are you satisfied or dissatisfied with the Door-to-Door Household Hazardous Waste collection program? Is that very or somewhat [satisfied/dissatisfied]?

Very satisfied	76.5%
Somewhat satisfied	10.1%
Neither satisfied nor dissatisfied	6.2%
Somewhat dissatisfied	2.9%
Very dissatisfied	.3%
DK/NA	4.0%

[Asked only of Residents of Atherton, Burlingame, Redwood City:]

28. Would you be interested in a convenient door-to-door collection program for such items as paints, solvents, insecticides, electronics, sharps, and fluorescent bulbs if it cost just \$5.40 PER YEAR?

Yes, interested	35.7%
No, not interested	58.3%
DK/NA	6.0%

DEMOGRAPHICS

And now just a few questions for comparison purposes.

- A. To begin with, do you, or someone in your household, set out your recycle, compost or garbage carts each week, or is that done by the maintenance staff at your apartment or condominium?

Respondent or someone in your household sets out garbage	97.8%
My personal household staff/maid /gardener sets it out for for me	1.6%
I have backyard service	.6%

- B. Record Gender [Recorded from voice.]

Male	48.4%
Female	51.6%

- C. [If RDD sample] What city do you live in?

Atherton	1.8%
Belmont	6.9%
Burlingame	7.6%
East Palo Alto	6.5%
Foster City	8.0%
Hillsborough	2.7%
Menlo Park	8.2%
Redwood City	19.8%
San Carlos	7.3%
San Mateo	26.0%
County of San Mateo/unincorporated	.8%
West Bay Sanitary District	4.4%

D. Now I am going to read some age groups. Please stop me when I reach the group that best describes your age:

18 to 24	10.0%
25 to 29	7.8%
30 to 34	7.7%
35 to 39	12.1%
40 to 44	9.6%
45 to 49	10.8%
50 to 54	8.6%
55 to 59	8.2%
60 to 64	7.2%
65+ years	17.0%
Prefer not to say/NA	1.0%

E. Do you own or rent your place of residence?

Own	74.1%
Rent	23.6%
Other	2.0%
DK/NA	.3%

F. What is the primary language used in your household?

Arabic	.9%
Chinese - Cantonese	.9%
Chinese - Mandarin	1.8%
English	88.7%
Filipino/Tagalog	.3%
Japanese	.2%
Hindi	.5%
Russian	.1%
Spanish	4.4%
Vietnamese	.1%
Other	1.5%
DK/NA	.6%

FROM VOTER FILE

G. Age

18 to 29	17.8%
30 to 39	19.8%
40 to 49	20.4%
50 to 64	24.0%
65 and over	17.0%
Not coded	1.0%

H. Homeownership Status

Owner	50.3%
Renter	49.7%