

MEMORANDUM



March 28, 2003

To: Jeanne Nader, Alameda Waste Management Authority
From: Alex Evans, Evans/McDonough Company, Inc.

Re: Composting Survey and Target Analysis

METHODOLOGY

The following memorandum highlights the results of a subsection of the November 2002 public opinion survey conducted by the Evans/McDonough Company for the Alameda County Waste Management Authority regarding landscaping, organic waste disposal, and composting.

A telephone survey of 804 Alameda County residents was conducted by trained professional interviewers November 6 – 14, 2002. Respondents were selected using Random Digit Dialing (RDD) methodology. The margin of error for the survey is plus or minus 3.5 percentage points at the 95% confidence interval.

Only the respondents that live in single-family housing were asked the battery of behavioral and attitudinal questions on landscaping, yard waste disposal, and composting that will be used in this analysis. Of the 804 survey respondents, 507 live in single-family housing. The margin of error for single-family residents is plus or minus 4.4 percentage points at the 95% confidence interval.

Where applicable, results were compared with a survey conducted July 19 – 26, 2001, which had 401 single-family resident respondents, with a margin of error of plus or minus 4.9 percentage points at the 95% confidence interval.

HIGHLIGHTS

- A vast majority (89%) of Alameda County single-family residents have a yard or garden.
- Nearly half of single-family residents are planning on replanting parts or all of their yards.
- Single-family residents want a yard that is well-maintained, but in an environmentally-friendly manner.
- Single-family residents agree that landscape inputs have an impact on the Bay.

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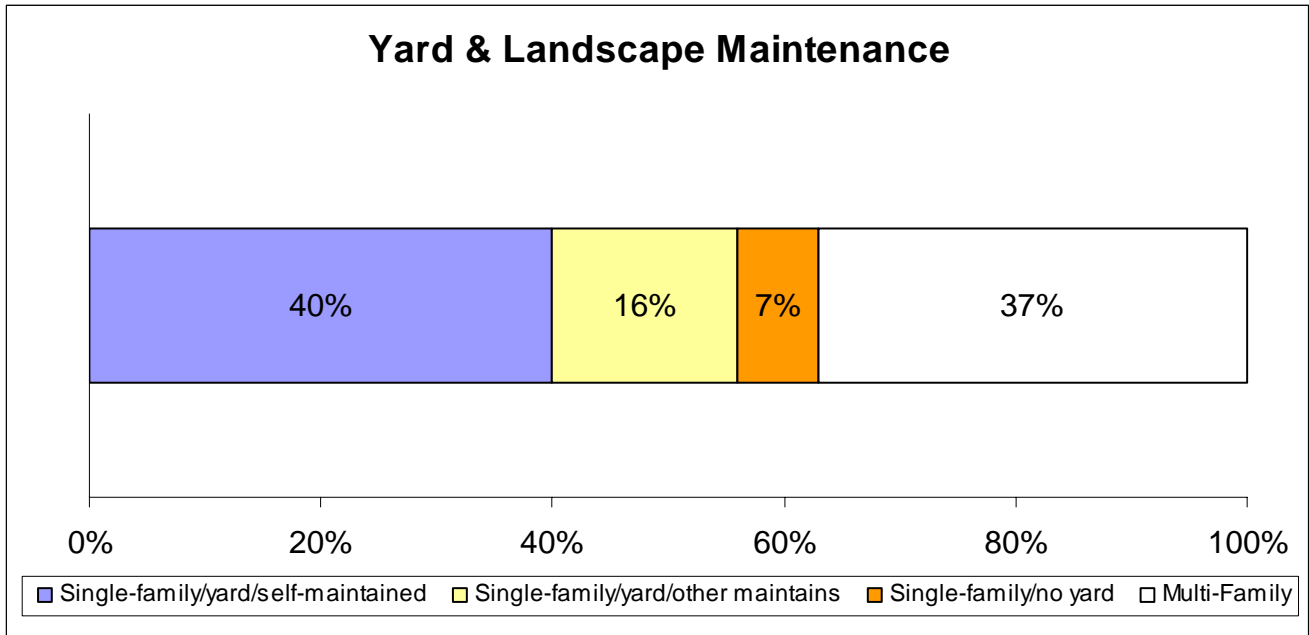
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- Although grasscycling is still not a common practice, single-family residents chose “leaving clippings on the lawn after mowing” second, after composting, as a new environmentally friendly practice that they would consider.
- Single-family residents see composting as a way to both enrich soil for the benefit of the garden, and help the environment.
- **Twenty percent of single family households in Alameda County are composting currently.**
 - Seventy-four percent of those who compost use less fertilizer since they started composting.
 - Most residents who have compost bins bought their bins from ACWMA, and the majority are very satisfied with the set-up, durability and ease of composting.
 - There is a population segment that is composting at the present time, but is not composting all of their qualifying organic waste.
 - The next group that is likely to be receptive to the composting message is well-educated, in their 40s or 50s, and lives in the Southern part of Alameda County.

SURVEY FINDINGS

Yard Content and Usage

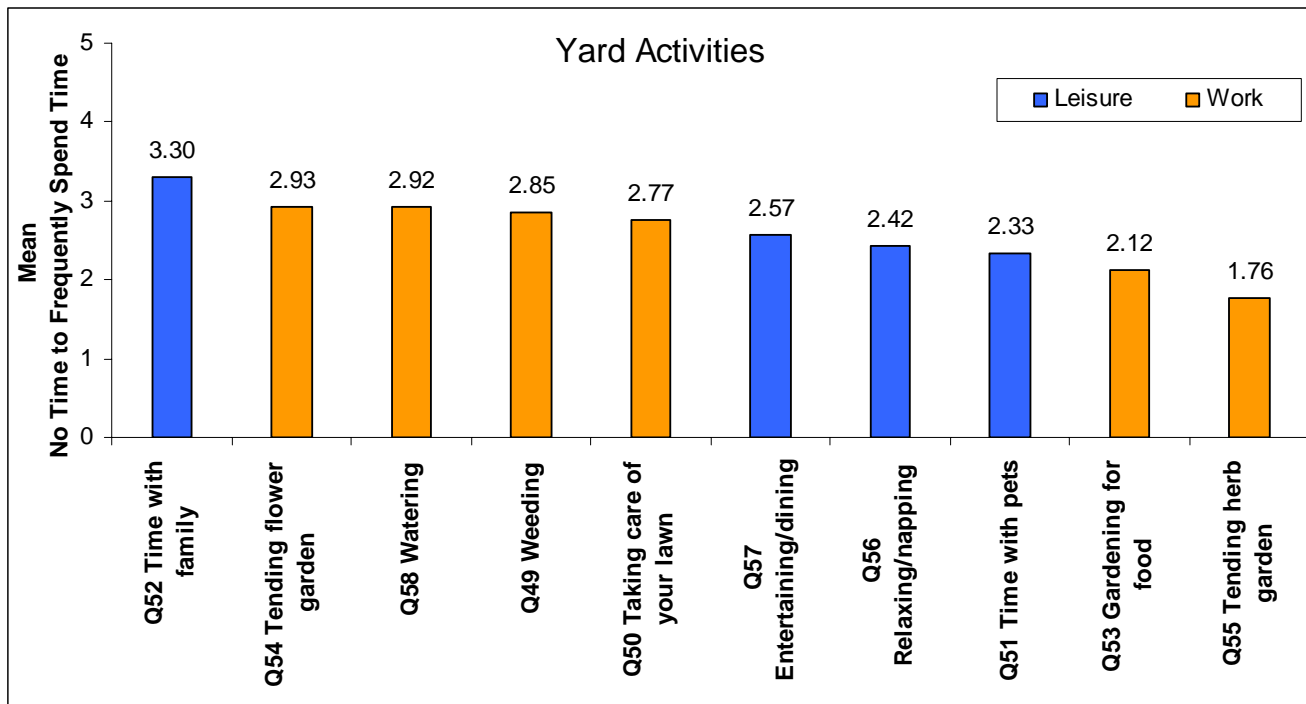
Most single-family residents of Alameda County have a yard or garden that they have a hand in maintaining. Of the 63% of residents that live in single-family housing, 89% have a yard (56% of the overall population), with 70% (40% of the overall) having a yard that they maintain entirely or partially themselves.



A large majority (88%) of single-family residents have yards at least partly occupied by a lawn, with 41% saying a lawn takes up more than half of their yard, another 41% saying their lawn takes up less than half of their yard, and 6% saying a lawn takes up about half of their yard. Only 12% of those with yards do not have a lawn at all. Many of those who have yards use some space to grow vegetables, herbs, or fruit (59%).

Over two-thirds (69%) of single-family home residents with yards spend at least an hour in their yard each week, with 27% spending one to two hours per week, 26% spending two to five hours per week, and 16% spending over 5 hours per week in their yard. When it comes to how much time their children spend in the yard each week, almost two-thirds (64%) said their children spend at least an hour, with 19% saying their children spend one to two hours per week, 21% saying their children spend two to five hours per week, and almost a quarter (24%) saying their children spend at least five hours in the yard per week.

Although spending time with their family rates as the number one activity people spend time in their yard doing, the remaining top activities in the yard are gardening-related. On a scale from one to five where one means they spend no time and five means they frequently spend time, “Spending time with your family or children” is the most popular yard activity, with a mean score of 3.30. Other popular activities include “Tending to flowers or a flower garden” (2.93), “Watering” (2.92), “Weeding” (2.85), and “Taking care of your lawn” (2.77). Some other activities more commonly associated with leisure are not done as frequently, including “Entertaining or dining” (2.57), “Relaxing or napping” (2.42), and “Spending time with your pet or pets” (2.33). Whether “working” or socializing, 86% agree that spending time in the yard helps them relax.



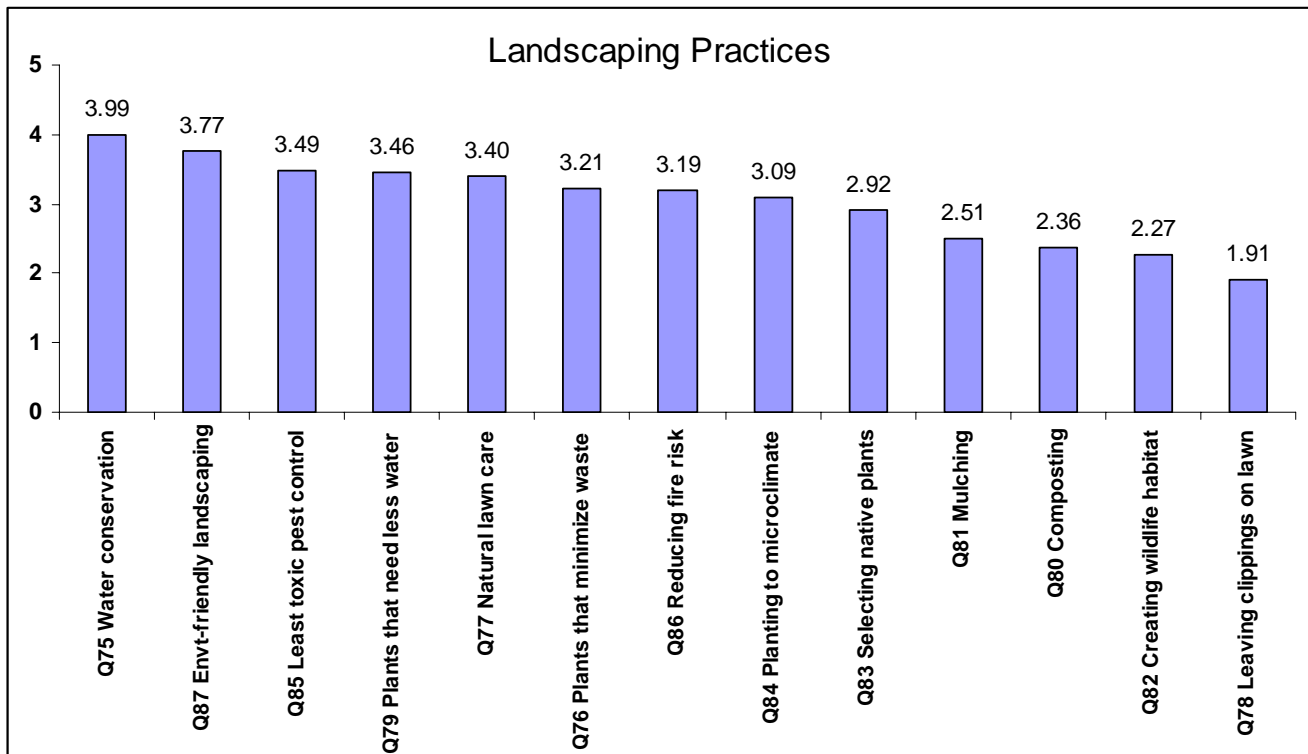
Alameda County single-family residents with yards place a high value on having and maintaining that yard. Ninety four percent (94%) agree with the statement “Having a well-landscaped yard increases my property value.” “Having a yard is important to me” garnered 94% agree, and 96% agree with the statement, “Keeping my yard looking nice is important to me.” When given the statement “Having a manicured lawn and hedges is important to me,” just over half (54%) register strong agreement, and another quarter (24%) somewhat agree.

There is a high level of awareness about the relationship between yard care and the environment. Sixty-two percent (62%) strongly agree that “My yard is maintained in an environmentally-friendly manner,” with another



29% somewhat agreeing with that statement. After hearing the statement “Lawn and garden products can have an impact on the water in the bay,” 88% agree (65% strongly/23% somewhat). However, when read the statement “The products I use have an impact on the water in the bay,” only 62% agree (40% strongly/22% somewhat). Over half of the respondents (56%) strongly or somewhat agree with the statement “I would like more information on how to maintain my yard in an environmentally-friendly manner.”

Respondents were asked how often they employ certain landscaping practices on a scale of one to five where one means they never do and five means they always do. The most common practice employed is water conservation, with a mean score of 3.99. Environmentally-friendly landscaping (3.77), least toxic pest control (3.49), using plants that need less water (3.46), and natural lawn care (3.40) were also popular. The least popular landscaping practices were mulching (2.51), composting (2.36), creating a wildlife habitat (2.27) and leaving clippings on the lawn after mowing (1.91).



Current Organic Waste Disposal

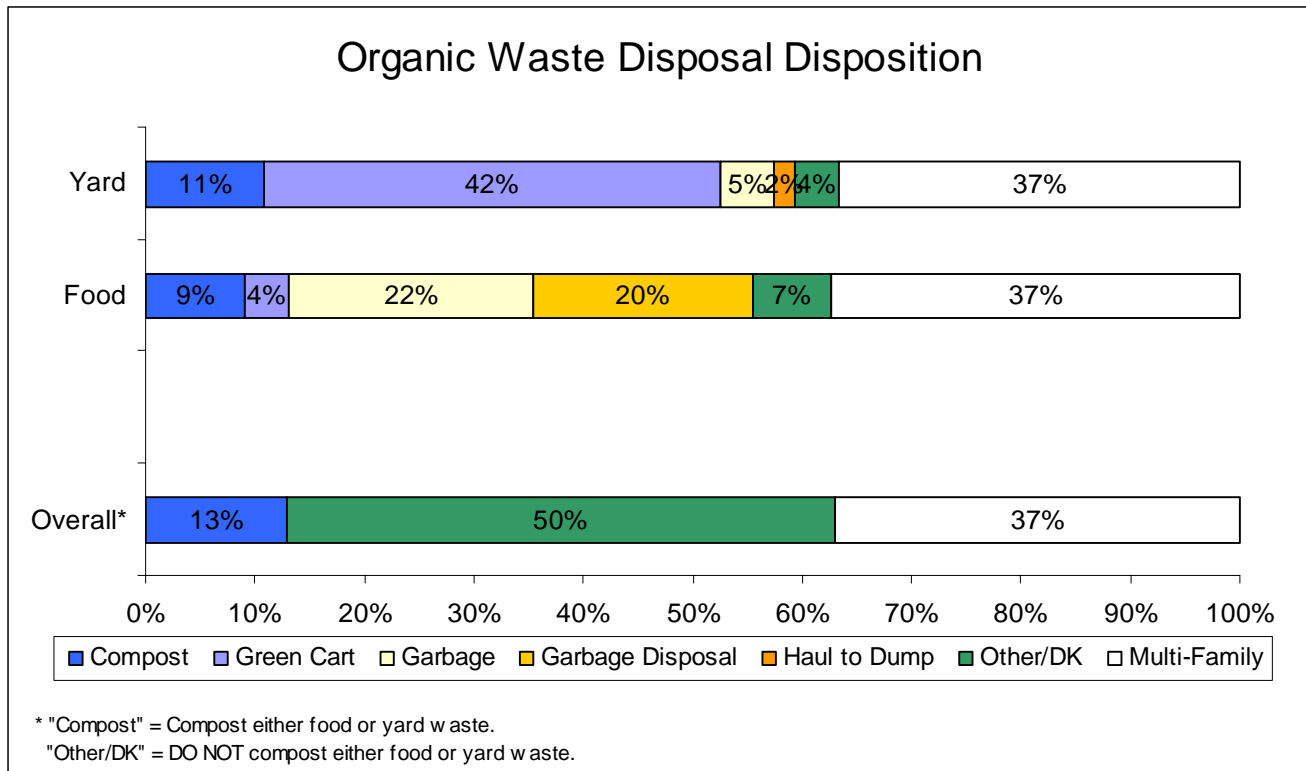
Of all single-family residents in Alameda County, just over one-third (35%) dispose of most of their food waste in the garbage. Thirty-one percent (31%) put most of their food waste in the garbage disposal, 15% compost their food waste, and 7% put their food waste in their green yard waste cart. Another 9% say they use a combination of methods of disposing of food waste.

Yard waste disposal by single-family residents with yards is primarily done with the green yard waste bin (66%). Another 17% compost their yard waste, 8% put yard waste in the garbage, and 3% haul their yard waste to the dump.

A total of 20% of Alameda County single-family residents claim to be composting food and/or yard waste in their yards. Looking at the County as a whole, 13% compost food and/or yard waste and 50% do not compost



food or yard waste. The remaining 37% of respondents were not asked the series of questions because they live in multi-family housing.



Looking specifically at grasscycling, we asked the same question used in 2001 for tracking purposes about how respondents treat their lawn clippings after mowing. There has been no change in the level of grasscycling in the County in the past year, with 9% of residents with lawns participating in 2001 and 8% participating in 2002. The vast majority are still putting their grass clippings in their green yard waste bins – 64% in 2001 compared with 63% in 2002.

Over half (58%) of single-family residents said they were either very or somewhat likely to put food waste in their green yard waste cart for recycling if they could. For the 38% that were either very or somewhat unlikely to do so, the top reasons were “odor/smell” (40%), “rodents/flies/bugs” (33%), “inconvenient” (27%), and “not clean” (25%).

Compost Attitudes

When respondents were asked what new landscaping methods they might consider using in their yards, 14% said they would consider composting at home. When asked why they aren’t composting yet, 51% said they are too busy or don’t have the time, 48% said they need more information about composting, and 43% said they didn’t have the space in their yard.

Respondents were read a list of statements about composting and asked whether they agreed or disagreed. The statement that received the strongest agreement was “Using compost in the yard helps improve the soil, keeping gardens and plants healthy,” with 83% either strongly or somewhat agreeing with that statement.



The next four statements with the highest levels of agreement were all related to the environment: “Using compost in the yard is good for the environment” (80% agree), “Recycling plant debris into compost helps reduce waste that would otherwise be put in landfills” (79% agree), 78% agree that “Making compost at home is good for the environment,” and 71% agree that “Using compost in the yard saves water by holding moisture in lawns and gardens.”

“Using compost will improve the beauty of the yard” (69% agree, 10% disagree), “Composting at home saves money” (69% agree, 11% disagree), “Composting food waste at home saves water by reducing usage of the garbage disposal” (67% agree, 13% disagree), and “Using compost in the yard reduces run-off from the yard into local streams and the bay” (60% agree, 10% disagree) were also met with fairly strong agreement by single-family home occupants.

Statements that did not garner as much agreement were: “Using compost in the garden makes the produce from the garden taste better” (47% agree, 10% disagree), “Compost smells bad” (47% agree, 37% disagree), “Composting at home is too much work” (46% agree, 40% disagree), “Composting is not necessary because we already recycle enough” (29% agree, 58% disagree), and “Composting at home is unhealthy. It spreads disease and attracts rodents” (26% agree, 53% disagree).

Current Composters’ Behavior

Of the 20% of County single-family residents who are composting either their food or yard waste, the top two reasons involve the benefit to themselves: “Fertilizer/gardening” is the top response at 41%, and “Soil improvement” is second with 23%. “Good for the environment” comes in at a distant third, at 12%, and another 10% say they compost because it helps them to produce “less garbage.”

In general, people who currently compost have a good idea of what they can and cannot compost. When asked a battery of questions about what they compost, the most diligently composted material is leaves (mean of 4.28 where 1 is never compost and 5 is always compost). Other frequently composted materials are fruit and vegetable trimmings (4.19), plant debris (4.12) and grass clippings (3.56). Dairy products (1.71), pet waste (1.39) and meat (1.38) are not frequently composted.

Most of the people who are already composting use a compost bin (64%). Almost half of those using a bin (45%) say they got their bin at a discount through the county. Of those using a compost bin, over half (58%) were already composting when they got their current bin. Many of the composters have been composting with the same bin for quite a while: 17% have been using the same bin for under a year, 41% have been using their bin for 1 to 5 years, and 35% have been composting in the same bin for over 5 years.

Nearly all composters are satisfied with their compost bins. Seventy-two percent (72%) of composters are very satisfied with their compost bin overall, and another 18% are somewhat satisfied. Looking at the level of satisfaction among those with County bins, every respondent was either very (83%) or somewhat (17%) satisfied with their compost bin. Durability is also a positive, both for county and other bins, with 87% of all compost bin owners either very or somewhat satisfied with the durability of their bins, and 100% of county bin owners very or somewhat satisfied with the durability of their bins.

Almost three-quarters of respondents who currently compost (73%) say they have recommended composting to their family, friends, or neighbors. Although people seem to have a fairly good idea of what they can and cannot compost, of those already composting only 19% have actually participated in the County’s composting workshop.

TARGET SEGMENTATION

Developing the Target

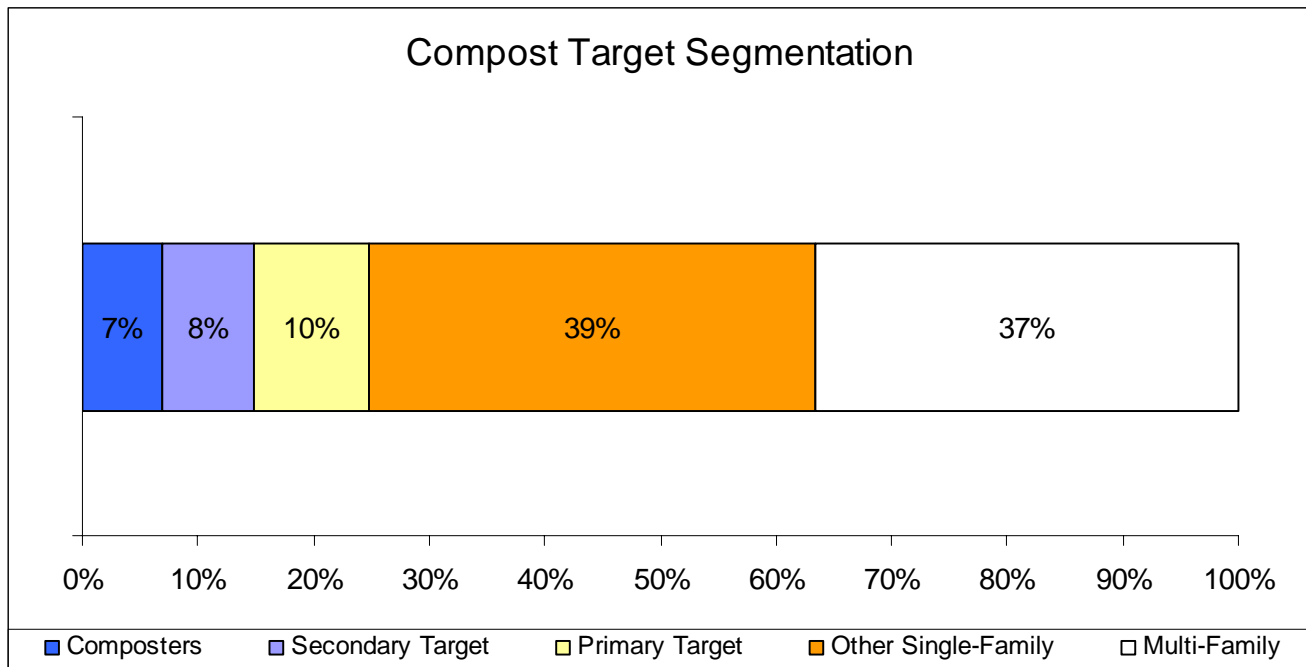
Using a combination of respondents' self-reported behavior with respect to composting food and yard waste, and their attitudes towards composting, we developed a primary and secondary compost target profile.

- Composters:** Said they compost **both** their food waste (Q93) **and** their yard waste (Q96).
- Secondary Target:** Said they compost **either** their food waste (Q93) **or** their yard waste (Q96).
- Primary Target:** Do not compost food waste (Q93) or yard waste (Q96), but have a favorable attitude toward composting (positive responses to Q118 through Q131).
- Other Single-Family:** Do not compost food waste (Q93) or yard waste (Q96), and do not have a favorable attitude toward composting (Q118 through Q131).

We believe that the Primary Target group is attitudinally and demographically the most likely to start composting. This target group by no means represents the sum total of everyone who might potentially compost in Alameda County. Rather, it represents that portion of county residents who are most likely to do so.

The Secondary Target group is made up of individuals are already receptive to the composting message, and can be targeted as a way to reduce their waste stream in the organic materials that they are not yet composting.

The two extremes remaining are the group that is already composting at home ("Composters") and the group that is neither composting, nor has a favorable attitude towards composting ("Other Single-Family").



Demographic Profile: Primary Target

This group makes up 10% of County residents and is distinguished by the following demographic characteristics:

- They are evenly split across genders, with 50% men and 50% women.
- Almost half of them live in Southern Alameda County (45%)
- They are better educated than the population as a whole (19% have graduate or professional degrees. 84% are college educated).
- They are much less likely than other single-family residents to have a job that can be classified as “professional” (50%), and are much more likely to be in a white collar (25%), blue collar (14%) or service (11%) profession.
- Over half of them (54%) are between the ages of 40 and 60.
- Over two-thirds (70%) of them are white.
- 81% identify themselves as environmentalists but over two-thirds of those qualify that by describing themselves as moderate, rather than strong, environmentalists.
- Compared to other single-family residents, they are new to the neighborhood, with 31% having lived in their homes less than 4 years.

Demographic Profile: Secondary Target

This group makes up 8% of County residents and is distinguished by the following demographic characteristics:

- This group is heavily female (62%).
- A majority of them live in Northern Alameda County (59%)
- They are better educated than the population as a whole (14% have graduate or professional degrees. 82% are college educated)
- Over half of them (54%) are between the ages of 40 and 60.
- They are predominantly white (76%).
- 80% identify themselves as environmentalists.
- 25% have lived in their homes less than 4 years, as compared with 38% of the general population.

COMPARATIVE DEMOGRAPHICS

	Overall 100%	Composters 7%	Primary Target 10%	Secondary Target 8%	Other Single- Family 39%
Strong Environmentalist	19%	49%	24%	38%	10%
Moderate Environmentalist	50%	41%	57%	42%	51%
Sometimes/Not Environmentalist	31%	9%	20%	20%	39%
Current residence 0 - 3 years	38%	11%	31%	25%	24%
Current residence 4 - 10 years	28%	29%	27%	27%	29%
Current residence 11+ years	34%	58%	42%	48%	46%
High school grad or less	24%	23%	16%	19%	26%
Some college or more	76%	76%	84%	82%	74%
Employed	64%	57%	67%	64%	62%
Retired	16%	29%	15%	14%	19%
Else	21%	13%	18%	22%	20%
Professional	52%	79%	50%	70%	56%
White collar	20%	13%	25%	10%	20%
Blue collar	14%	8%	14%	3%	12%
Service	10%	0%	11%	8%	9%
Else	3%	0%	0%	10%	3%
White	56%	73%	70%	76%	58%
African-American	15%	8%	5%	12%	13%
Hispanic/Latino	9%	4%	9%	4%	9%
Asian	11%	5%	9%	4%	13%
Other/Refused	9%	12%	8%	4%	7%
18 - 29	18%	5%	11%	14%	10%
30 - 39	23%	17%	20%	17%	21%
40 - 49	23%	26%	35%	32%	24%
50 - 59	16%	22%	19%	22%	16%
60+	20%	29%	15%	16%	28%
Male	49%	53%	50%	38%	47%
Female	51%	47%	50%	62%	53%
Male under 50	33%	29%	36%	26%	27%
Female under 50	30%	19%	30%	37%	29%
Male 50+	16%	24%	14%	12%	20%
Female 50+	21%	28%	20%	25%	24%
North County	49%	48%	33%	59%	37%
South County	33%	36%	45%	30%	39%
East County	13%	12%	19%	11%	17%



Yard Maintenance, Content, and Usage

Most of the members of both the Primary and Secondary Target groups take care of their own yards. Over three-quarters (77%) of the primary target and 80% of the secondary target does all of their own yard maintenance, a statistically insignificant difference.

Over half (53%) of the primary target group has a lawn that takes up at least half of their yard, and only 9% does not have a lawn at all. The secondary target is much less likely to have a large lawn, with only 36% with a lawn that takes up half of the yard or more. The secondary target is also much more likely to have no lawn at all, with 21% saying they do not have one.

Members of the primary target group are likely to be growing food in their garden, with 68% saying they do so. Three-quarters of the secondary target grows food in their garden.

Respondents in any of the three compost groups (composters, primary target, or secondary target) are likely to spend more time in their yards than other single-family residents. Over two hours per week is spent in the yard by 64% of the primary target members or their children. Similarly, 68% of the secondary target or their children spend over two hours per week in their yard, and 65% of the composters or their children spend over two hours per week in their yard. Among the remainder of single-family residents, only 43% report spending over two hours per week in the yard.

A quarter (25%) of the primary target group is considering either replanting or relandscaping their yard. The secondary target group is the most likely to be considering making major changes, with 41% saying they are considering that.

On a scale of one to five, where one means they never use the practice and five means they always use it, 70% of the primary target answered 4 or 5 when asked how often they employ environmentally-friendly landscaping practices in their yard. The primary target group also was conscious of water conservation, with 76% answering 4 or 5 when asked how often they conserve water in their yards.

Primary and Secondary Target Groups: Attitudinal Profile

The target groups appear to have a good understanding of the relationship of lawn and garden products to the Bay. Nearly all of the primary target (99%) agrees with the statement “Lawn and garden products can have an impact on the water in the Bay,” and all of the secondary target agrees when read the same statement. However, after hearing the statement “The products I use in my yard have an impact on the water in the Bay” was read, 70% of the primary target agree, and 62% of the secondary target agree.

Sixty-seven percent (67%) of those in the primary target think they need more information about environmentally-friendly landscaping. Of the 21% of the primary target that hires a gardener or landscaper for at least some of their yard maintenance, 36% say they have discussed using environmentally-friendly practices with their gardener or landscaper, but 41% say they would pay more for it.

Compost Attitudes

Since the primary target was created using the battery of attitudinal questions about composting, it is misleading to look at their responses to those questions as compared to the other groups. However, we can look at their comparative level of agreement with different statements to ascertain which messages are the most resonant for the target population.

The top two statements that receive the most agreement among the target group are “Using compost in the yard is good for the environment,” and “Making compost at home is good for the environment.” Other statements that meet with high levels of agreement are “Using compost in the yard helps improve the soil, keeping gardens and plants healthy,” “Recycling plant debris into compost helps reduce waste that would otherwise be put in landfills,” and “Using compost in the yard saves water by holding moisture in lawns and gardens.”

The statements that receive the lowest levels of agreement among the primary target are “Composting at home is too much work,” “Composting at home is unhealthful. It spreads disease and attracts rodents,” “Composting is not necessary because we already recycle enough,” and “Compost smells bad.”

Over one-quarter (27%) of the primary target group has considered starting composting as a new landscaping practice. Of the primary target, the top reasons given for not having started new environmentally-friendly landscaping practices are “space limitations/don’t have enough room” (37%), “equipment inadequacies” (25%), and “time consuming/too busy” (24%).

THE MESSAGE

There is already strong agreement from the Primary Target group that composting is the environmentally-friendly thing to do, and carries the added benefit of a healthier yard. In order to effectively recruit our Primary Target residents to take the next step and start composting, we will need to convince them that composting at home is something they can do, and it will not be a major disruption to their lifestyles. The following message incorporates that message with their environmental convictions:

Composting at home is easy, space-efficient, good for the environment, and good for your garden.

This message should be accompanied by a demonstration of how very easy composting is by outlining three or four simple steps (collect food scraps and yard trimmings, empty into compost bin once a week, turn compost once a month, use your new rich soil in your garden).

This message can also be used to encourage the secondary target group should to compost more of their qualifying organic waste products. It is unnecessary to develop two separate composting campaigns since both target groups respond to the same set of messages.