



SURVEY OF PROPERTY MANAGERS

MULTIFAMILY RECYCLING SURVEY 2013

February 2013



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FEBRUARY 2013

INTRODUCTION

This report presents the findings of a survey of multifamily property managers in Washington state to assess recycling and composting practices at multifamily properties as well as barriers and motivations to improve recycling and composting.

This being the first statewide survey to explore recycling at multifamily properties, the objective was to learn from property managers about:

- 1) current recycling and composting practices at multifamily properties; and
- 2) barriers and motivations to improve recycling at multifamily properties.

A total of 530 property managers completed the questionnaire between January 23 and February 11, 2013 – 512 on-line and 23 via paper questionnaire.

Property managers were asked about the physical attributes of the property relative to recycling (location of bins, signage, etc); manager practices (talk with residents, hand out materials); materials (handouts, signs,); and resident characteristics and practices (language challenges, recycling habits). They were also asked several questions about best practices, and what would help them improve recycling.

This research was sponsored by The Washington State Recycling Association and its subcommittee, Washington Multifamily Recycling Study Group (WAMRS), with funding from the Washington State Department of Ecology and:

Kitsap County Public Works;
King County Housing Authority;
Seattle Public Utilities;
Spokane Regional Solid Waste System;
City of Tacoma Solid Waste Management; and
Clark County.

The survey was designed by Elway Research, Inc. and Full Circle Environmental, Inc. in close collaboration with representatives from the agencies above. The design of this questionnaire was informed by detailed executive interviews with multifamily property managers, a summary of which can be found in the appendix to this report.

A word about the sample and data interpretation

The list of property managers to be included in this survey was developed by the research and client teams. Lists of multifamily property managers were collected from local government agencies, garbage and recycling haulers, associations and other entities with a connection to the Washington State Recycling Association. We believe this to be the most comprehensive list of multifamily property managers in the state. It does not constitute a complete census of multifamily property managers in Washington however, which has implications for the interpretation of these survey findings.

Because there is no census of property managers, there is no way to know or estimate the true characteristics of the population of property managers, and therefore no way to estimate how representative this sample is.

It is also important to note that this was an opt-in survey. That is, property managers for whom we had an address were invited to take the survey. Some 6% of those invited did so. It seems reasonable to assume that there may be a “good behavior” bias in these results. That is, managers who made the effort to respond to the survey are more likely to be committed to recycling than managers who did not respond. This conclusion is supported by evidence in the findings themselves, where, for example 95% of respondents said that “recycling is an effective way to conserve resources and protect the environment” while only 5% said “when all is said and done, recycling is not worth the time and effort that goes into it.” While it is entirely plausible that a majority would agree with the former statement, it does not seem likely that, even in Washington state, only 5% of multifamily property managers would hold the opinion that recycling is more trouble than it is worth.

A prudent interpretation of these findings therefore is that they indicate the behavior and attitudes of managers who model best practices rather than that they provide a full picture of the entire population of multifamily property managers. As such, the findings provide valuable information to guide the development of strategies to improve recycling. There are useful distinctions between what is working well and not so well, even if it is assumed that these findings are from those most committed to recycling.

This report presents Key Findings followed by annotated graphs of the survey results. The appendix contains the questionnaire used in this survey and demographic crosstabulation tables.

ACKNOWLEDGMENTS

Producing useful research is a team sport. That was never more true than for this survey. This project involved the cooperation and support of many people, jurisdictions, organizations and companies. We would like to especially thank those that organized this work and made this effort possible, the WAMRS Property Management Survey Committee

- Jetta Antonakos, City of Tacoma
- Jack Harris, Blue Marble Environmental and City of Everett
- Chris Piercy, Kitsap County and Washington State Recycling Association
- Erin Rowland, Clark County
- Marcia Rutan, Seattle Public Utilities
- Suzanne Tresko, Spokane Regional Solid Waste System
- Angela Wallis, King County Housing Authority and Washington State Recycling Association

These Multifamily Property Management Organizations provided valuable input and support with the distribution of the survey:

- Alice Bartley, Rental Housing Association
- Jim Wiard, Washington Multifamily Property Management Association
- Michelle Leary and Tracy Abdul, Washington State Chapter Community Associations Institute

This survey would not have been possible without the support of local jurisdictions and their recycling company partners by supporting our efforts to compile property manager contact information by which to distribute the survey.

Recycling Companies:

- Dustin Bender, Sunshine Disposal
- Terra Heilman and Jocelyn White, Waste Connections
- Candy Castellanos, Waste Management

Local Jurisdiction Representatives:

- | | |
|--|--|
| • Kathleen Edman, City of Auburn | • Scott Sutherland, City of Mount Vernon |
| • Jenifer Goodhart, City of Bellevue | • Ron Jones, City of Olympia |
| • Sabrina Combs, City of Bothell | • Helen Freilich, City of Port Angeles |
| • Laura Techico, City of Des Moines | • Gail Everett, City of Richland |
| • Steve Fisher, City of Edmonds | • Stacey Auer, City of Redmond |
| • Jeanette Brizendine, Rob Van Orso, City of Federal Way | • Todd Olson, City of Seatac |
| • Gerty Coville, King County Solid Waste | • Leo Jacobs, City of Sedro-Woolley |
| • Kelly Ferron, City of Kirkland | • Rika Cecil, City of Shoreline |
| • Toni Fuller, Kitsap County | • Sego Jackson, Snohomish County Public Works |
| • Travis Dutton, Pierce County | • Rebecca Fox and Chris Partman, City of Tukwila |
| • Callie Martin, Skagit County Public Works | • Scott Schimes, Thurston County |
| | • Judi Gray, Whitman County |

Most of all, we would like to thank the more than 500 property managers across Washington state that took the time to complete this survey and provide us with useful information to support improvements in multifamily recycling efforts.

METHODS

SAMPLE: 530 managers of multifamily properties in Washington state.

SAMPLE FRAME: Lists of multifamily property managers were obtained from agencies, waste hauling companies and other organizations around the state. In all, 9,295 names were included on the final mailing list, representing 12,583 separate properties.

Managers who manage more than one property were instructed to answer the questions for the largest multifamily property they manage.

METHOD: On-line survey. Prospective respondents were mailed a postcard invitation to participate with a URL for the survey questionnaire, and a reminder card one week later. Respondents were given the option to request a paper questionnaire be mailed to them. Some 37 paper questionnaires were mailed out; 23 were completed and returned.

FIELD DATES: January 23 through February 10, 2013.

MARGIN OF ERROR: The margin of sampling error refers to the probability that the survey results match results that would have been obtained by interviewing the entire population. Calculating these estimates requires a random sample with everyone in the population having an equal and known chance of being selected. In this case, the size and nature of the population is not known and the sample included only names that could be obtained. It is therefore not possible to calculate an estimate of sampling error.

In addition to sampling error, all surveys may be subject to multiple sources of error including, but not limited to coverage error, non-response error and measurement error.

It must be kept in mind that survey research cannot predict the future. Although great care and the most rigorous methods available were employed in the design, execution and analysis of this survey, these results can be interpreted only as representing the answers given by these respondents to these questions at the time they completed the survey.

SAMPLE PROFILE

In interpreting these findings, it is important to keep in mind the characteristics of the people actually interviewed and the properties represented in the survey. This table presents a profile of the 530 property managers who responded to this survey.

Note: Here and throughout this report, percentages may not add to 100%, due to rounding.

NUMBER OF PROPERTIES MANAGED	51%	One
	49%	Multiple
NUMBER OF UNITS IN THIS PROPERTY	36%	1-20 units
	30%	20-100 units
	33%	100+ units
	94	average (mean)
	50	median number
OWNERSHIP OF PROPERTY	65%	Private entity
	11%	Housing Authority
	13%	Condo Association
	2%	Cooperative
	4%	Non-profit or Religious
	6%	Other
REGION	39%	Seattle
	19%	King County (non-Seattle)
	13%	Pierce + Kitsap
	10%	North Puget Sound
	9%	Peninsula + SW Washington
	10%	Eastern WA
RESPONDENT POSITON	28%	Owner
	54%	Property manager
	18%	Other (Coop or Condo Assn)
RECYCLING DECISION MAKER	81%	Yes
COLLECTION SERVICE FOR	52%	Recyclables only
	1%	Compostables only
	41%	Both
	7%	Neither

KEY FINDINGS

DESCRIPTION OF PROPERTIES

- ◆ **4 in 10 of these properties have collection service for both recyclables and compostables**
 - Another 52% have recycling collection only
- ◆ **Those who do not recycle or compost, cited numerous reasons for not doing so.**
 - Illegal dumping, lack of resident willingness, cost, potential contamination, lack of space and cost were each rated by more than 4 in 10 as “significant” reasons why they did not recycle or compost.

COMPOSTING

- ◆ **4 in 10 properties compost food waste; 3 in 10 collect yard debris**
 - 6 in 10 properties that compost at all collect both food and yard waste.
- ◆ **More than 2/3 of properties that compost have:**
 - Containers of a different color from garbage containers;
 - Signs or labels on the containers; and
 - Compostables bin near every outside garbage container.

RECYCLING

- ◆ **7 in 10 properties that recycle have all-in-one containers**
- ◆ **1 in 4 have been charged a contamination fee or had a cart rejected by the hauler**
 - Contamination penalties are related to property size:
 - 19% of buildings of 20 units or less have been penalized, vs.
 - 18% of 20-100 unit properties and
 - 35% of 100+ unit properties
- ◆ **Recycling and Composting infrastructure are similar**
 - The top 4 property characteristics were ranked in the same order and with the same frequency at both recycling and composting properties:
 - ~ Containers of a different color from garbage containers
 - ~ Signs or labels on the containers
 - ~ Compostables /Recyclables bin near every outside garbage container
 - ~ Property manager actively promotes recycling/composting

- The only difference was in the volume of the carts: Recyclers were 3 times as likely as composters to say their containers had the same volume capacity as their garbage containers.
- ◆ **Most property managers (70%) hand out recycling information to residents, other actions less prevalent**
 - 1 in 3 talk directly with non-recyclers
 - 1 in 6 hold education presentations for residents
- ◆ **Convenience of collection facilities rated as paramount**
 - 6 in 10 respondents rated “containers near garbage containers” in the top 5 most successful things they have done for recycling/composting. 1 in 4 rated it #1.
 - ~ The distinction between inside and outside collection sites was not made in this question, but 65% of respondent said their outside collection sites were co-located, compared to only 15% of inside collection sites.
 - 3 of the top 4 rated practices were “infrastructure”: containers near garbage containers, signs at collection site, and containers of different colors.
- ◆ **Managers give themselves high marks for recycling, but see room for improvement**
 - 3 in 4 managers rated their property’s recycling efforts as “excellent” (16%) or “good” (58%).

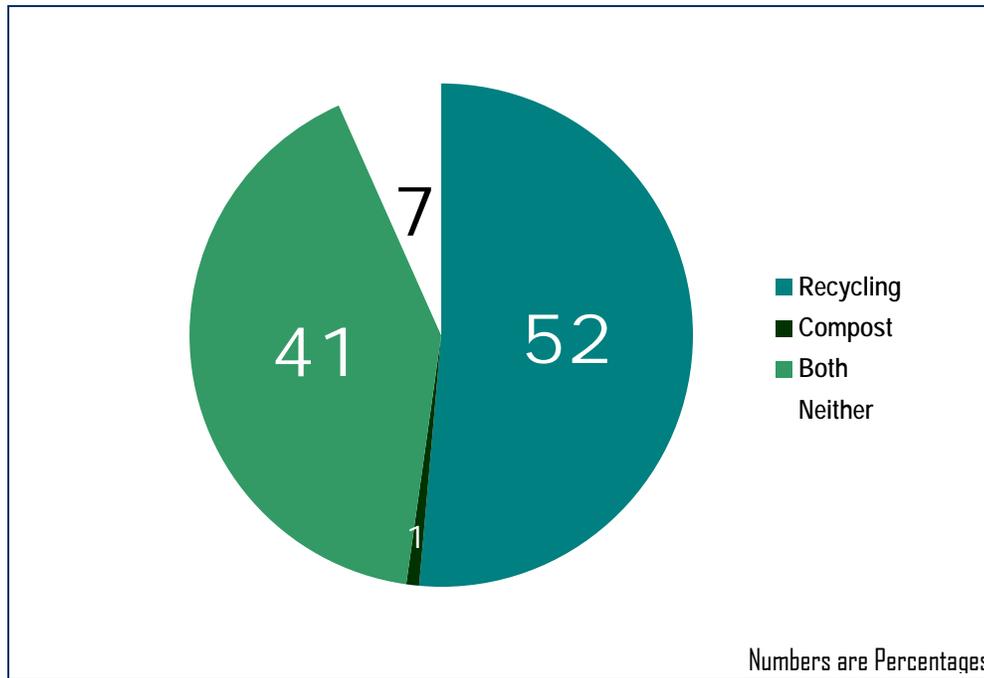
CHALLENGES

- ◆ **Resident attitudes rated as top barriers to improving recycling**
 - The top-rated “challenge to improving recycling at this property” was “culture and habits of residents. More than 4 in 10 managers rated this as a significant barrier.
 - 3 of the top 5 challenges had to do with residents. After culture: “lack of resident willingness” ranked #3; and “level of resident knowledge ranked #5.
- ◆ **Managers selected a variety of ways to improve recycling, but no silver bullet**
 - Recycling information handouts were ranked #1, with 4 in 10 picking that as one of their 5 practices
 - There was not a great deal of discrimination: 11 of the 14 items on the list were selected by at least 1 in 5 managers and none was selected by more than 2 in 5.
- ◆ **Bin convenience (location, size) and signage were rated as making the most difference “between properties where recycling works well and properties where it does not work well.”**
- ◆ **8 in 10 managers were willing to do more to encourage recycling, including 1 in 4 willing to do “much more.”**

SURVEY RESULTS

NOTE:

The figures in the graphs on the following pages are percentages.

PROFILE**9 in 10 Properties Recycle; 4 in 10 Compost**

Q7 Does this property have collection service by a hauler for: Recycling? Composting? Both?

- **Recycling highest in Seattle, lowest in Eastern Washington**

71% in Eastern Washington recycle (23% both recycle and compost)
99% in Seattle recycle (72% both recycle and compost).

- **Seattle composting at 2-5 times the rate of other regions**

72% of Seattle properties reported composting, compared to
26% in King County outside Seattle and
25% in Eastern Washington
22% in the far west,
19% in the North Sound, and
16% in Pierce /Kitsap.

- **More residents, less composting**

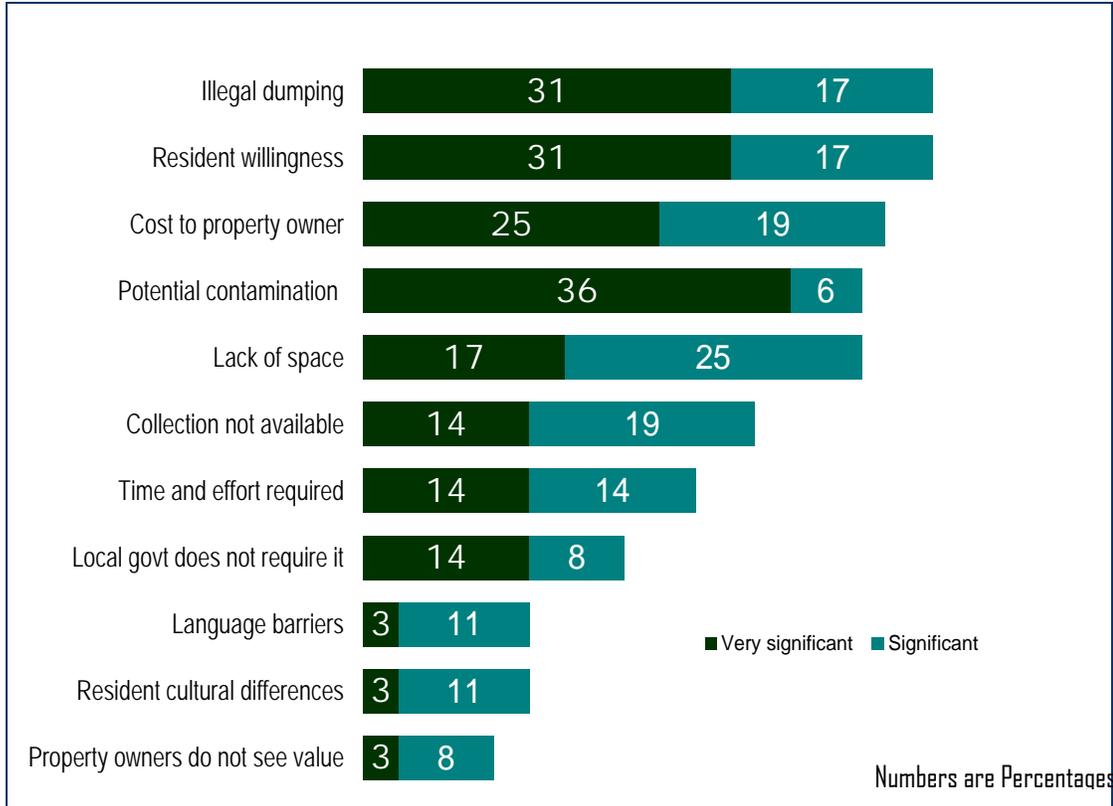
55% of small (1-20 unit) buildings compost, vs.
42% of mid-size (21-100 unit) buildings, and
27% of large (100+ unit) ones.

- **Condos and Coops most likely to compost**

61% of condos composted; as did
51% of coops and “other” types of property; compared to only
40% of privately owned properties; and
21% of public or non-profit properties.

NO RECYCLING

Variety of Reasons for Not Recycling or Composting

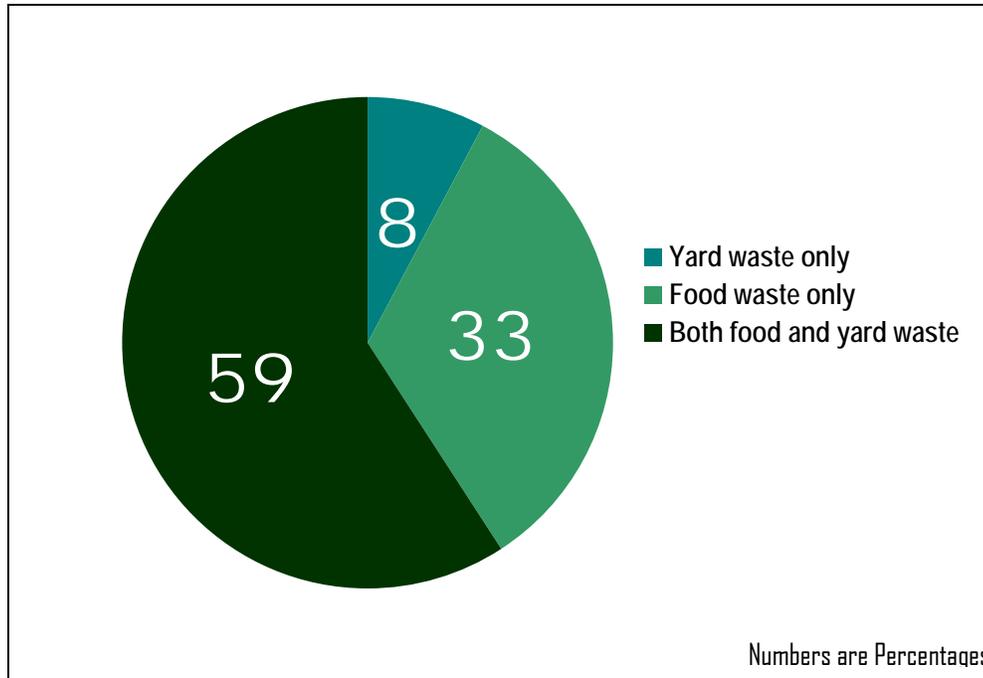


Q9 There are many reasons why a property may not have recycling or compostable collection. Please Indicate the significance of each factor as a reason for not recycling at this property.
 [ASKED OF THOSE WITH NO RECYCLING OR COMPOSTING (n=36)]

- **Only 36 respondents had no recycling or compostable collection. Of those**
 - Just under half cited illegal dumping, lack of resident willingness and cost to the property owner as significant reasons why not
 - About 1/3 said they had no hauler collection service
- **25% of these respondents manage other properties at which there is recycling and 1/3 had tried recycling and or composting at this property, but discontinued it.**
 - 31% had tried recycling
 - 9% had tried composting

COMPOSTING

6 of 10 Properties that Compost Collect Both Food And Yard Waste

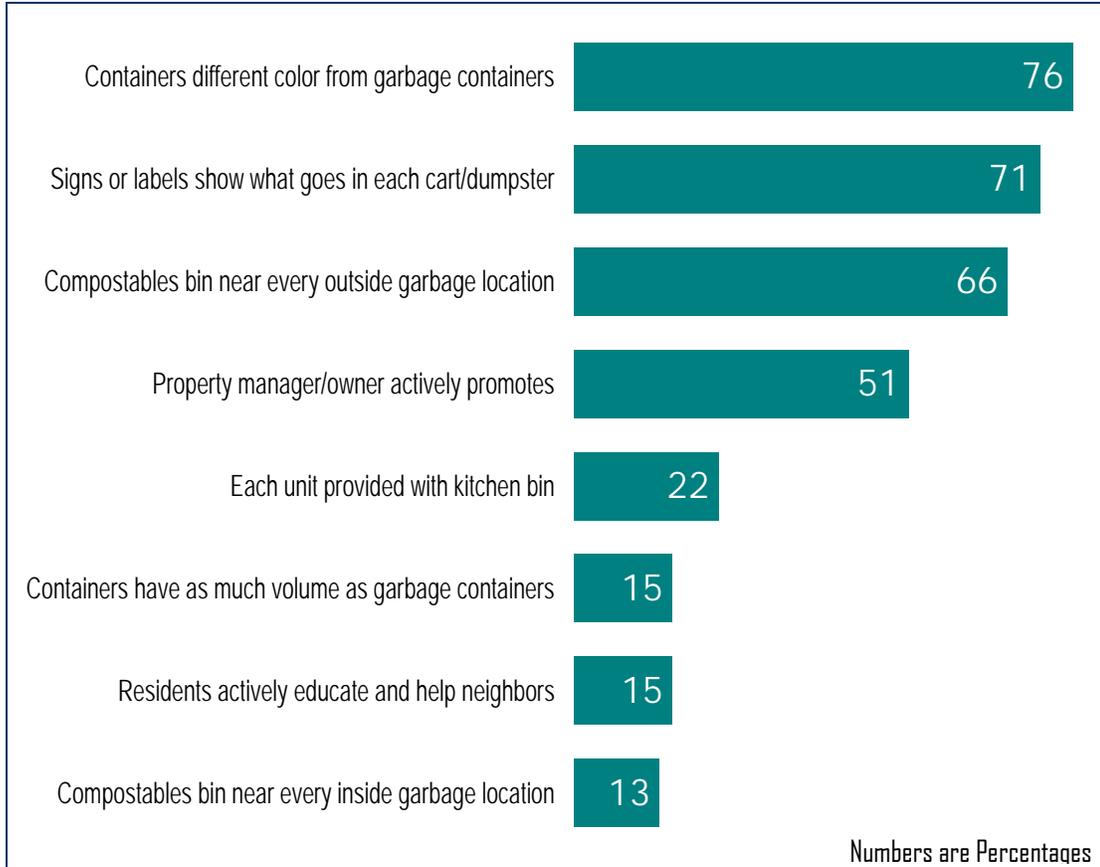


Q11 Which of the following best describes the types of compostables collected at this property?
[n=221]

- **Given that 42% of all properties reported composting, this computes to 39% of all properties represented in this survey compost food waste and 28% compost yard debris**
- **Patterns were relatively uniform across the state, but sub-sample sizes were too small to allow for statistical comparisons**
- **The larger the property, the less likely to compost both food and yard waste:**
76% of properties under 20 units composted both, compared to 46% of properties of 21-10 units and 40% of 100+ unit properties,
- **Condos were most likely to compost both (67%), while public or non-profit properties were least likely (42%).**
 - Public properties were most likely to compost yard debris only: 33% compared to 5-7% of other types of properties

COMPOSTING

Most Properties Have Different Color Containers, Signage and Convenient Collection Locations

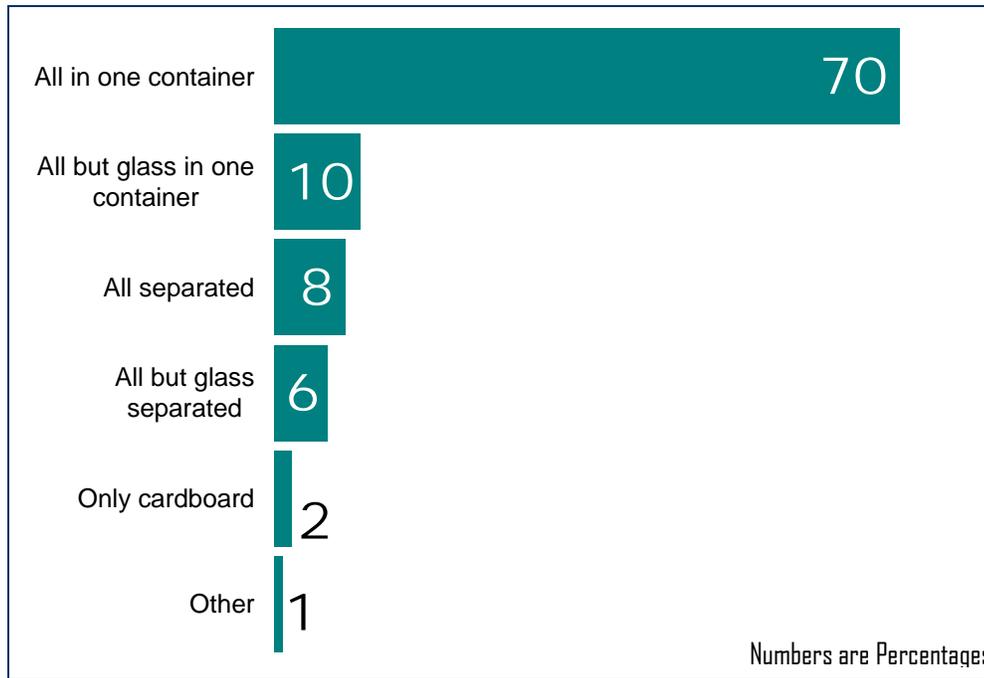


Q12 Which of the following – if any – apply to this property for your compostables program? [n=221]

- Container co-location varied by property size.**
 79% of the smallest properties had a compostable container near every outside garbage container, but only 42% of the largest properties did.
 25% of the largest properties had a compost bin near every inside garbage container, but only 2% of the smallest properties did

RECYCLING

Single-Container Collection Most Common

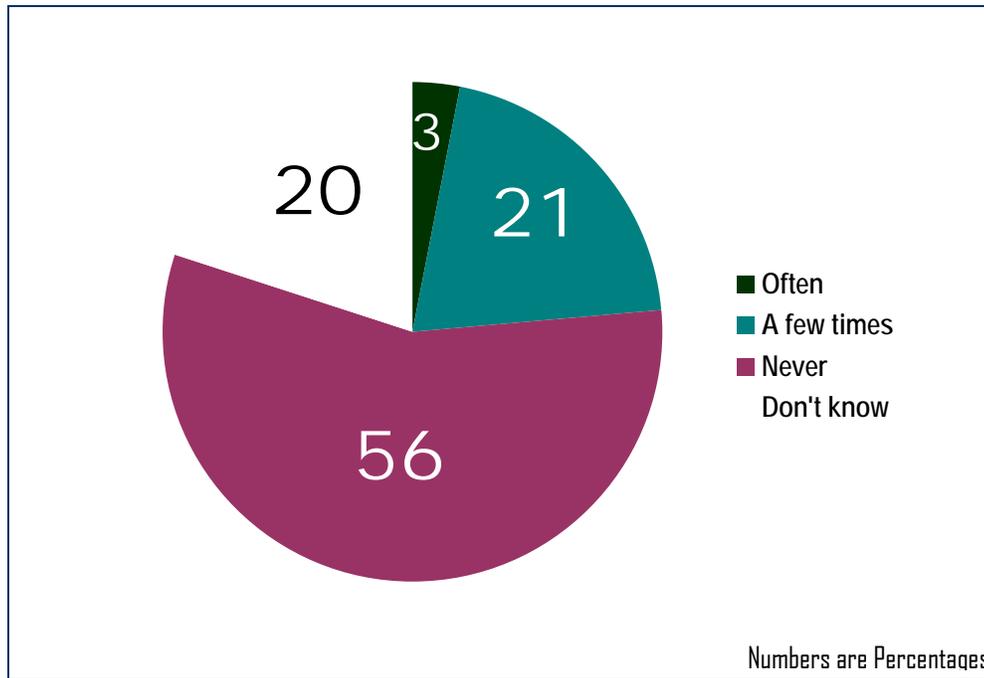


Q13. Which of the following best describes RECYCLING at this property? (paper, cardboard, metal, glass, plastic, etc.) [ASKED ONLY OF THOSE WHO HAVE RECYCLING SERVICE, n=490]

- Single-container recycling collection varies by region**
 87% in King County and Seattle, and
 76% in Eastern Washington,
 60% in North Puget Sound, but only
 30% in the Peninsula and Southwest counties
 23% in Pierce/Kitsap.
- Better recycling efforts are associated with higher access to single-container pickup**
 74% of those who rated their recycling as "excellent" or "good" had single-container recycling, vs.
 60% of those who rated themselves "fair" or "poor"

RECYCLING

1 in 4 Charged Contamination Fees



Q14. Have you had a cart/dumpster rejected, or "contamination fees" charged, by the hauler due to material in the wrong container? [n=490]

• **Cart rejection/ contamination fees varied slightly by region:**

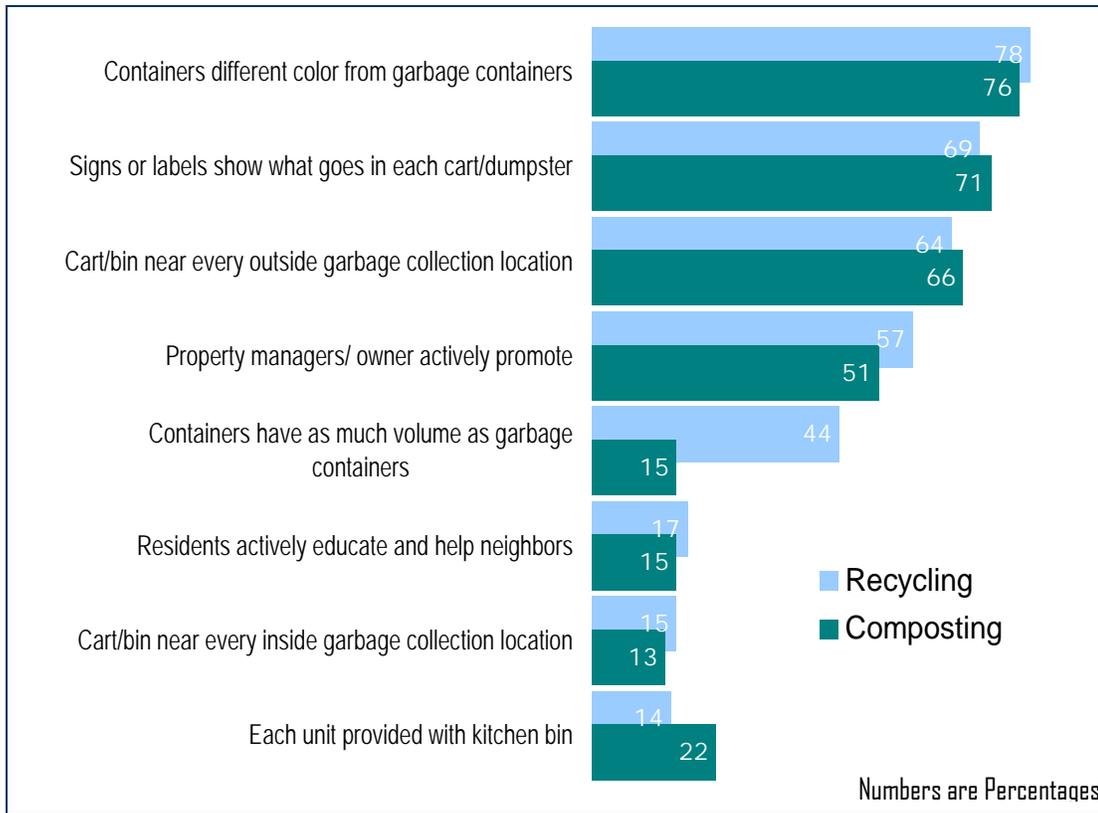
- King County (35%)
- Peninsula and Southwest (30%)
- North Sound (25%)
- Pierce/Kitsap (24%)
- Seattle (21%)
- Eastern Washington (5%)

• **Small buildings least likely to have carts rejected:**

19% of buildings with 20 or less units have had a cart rejected, vs. 18% of 20-100 unit properties and 35% of 100+ unit properties.

RECYCLING

Similar Infrastructure For Recycling, Composting



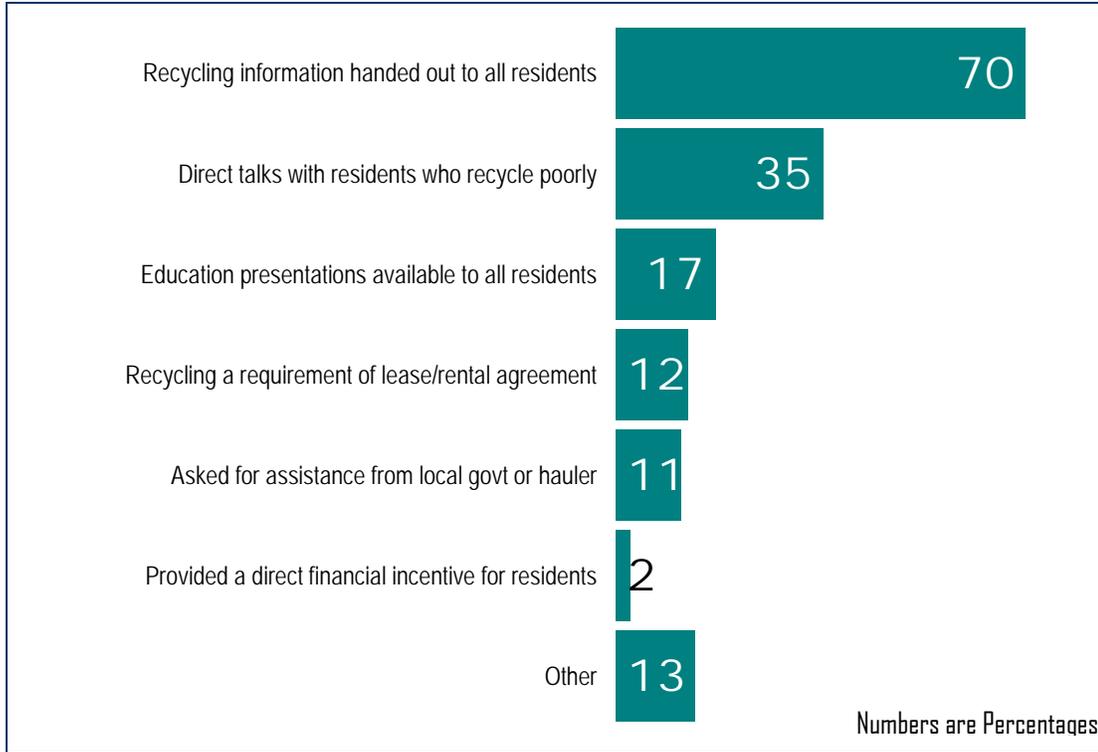
Q12. Which of the following - if any - apply to this property for your COMPOSTABLES program? (food waste, yard waste) [ASKED ONLY OF THOSE WHO HAVE COMPOSTABLE SERVICE, n=221]

Q15. Which of the following descriptions - if any - apply to this property for your recycling program? (e.g., paper, cardboard, metal, glass, plastic, etc.) [n=490]

- **Biggest difference is in volume of carts**
44% report recycling containers same volume as garbage containers, vs. 15% who say this of composting containers
- **Managers who both compost both food and yard waste had more of these features than did managers who compost only one or the other.**
 - Of the 8 features listed, managers who both compost both food and yard waste had an average of 3.4 features available, vs.
 - 3.1 for those who compost only food, and
 - 2.6 for those who compost only yard debris.
- **More infrastructure in Seattle buildings**
 - Seattle managers listed an average of 2.5 composting features, vs. 0.7 elsewhere; and
 - 3.9 recycling features, vs. 3.0 elsewhere.

RECYCLING

**Most Hand Out Recycling Information;
Few Do Much Else to Encourage Recycling**

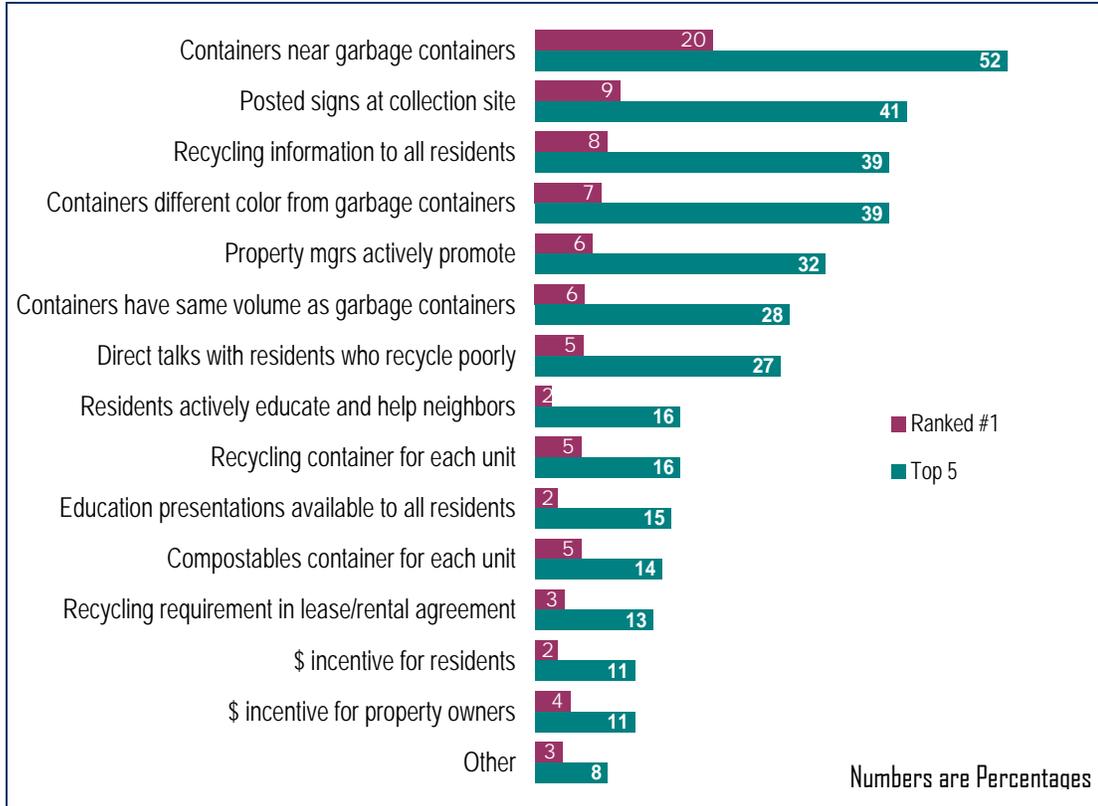


Q16. Have any of the following been done to encourage residents to recycle at this property?
[n=490]

- **Difference between positive and negative self-rating**
 - Compared with those who rated their own recycling efforts "Fair" or "Poor," those who rated themselves "Excellent" or "Good" were more likely to:
 - ~ Hand out information to residents (73%, v. 60% of Fair/Poor self-raters)
 - ~ Have education programs (19% v. 10%), and
 - ~ Require recycling in the lease (14% v. 7%)
 - But were equally likely to use:
 - ~ Direct talks with residents (36%)
 - ~ Assistance from government and haulers (15%)
 - ~ Financial incentives (3%)

RECYCLING

**Practices Related to Convenience of Collection
Seen As Most Successful**



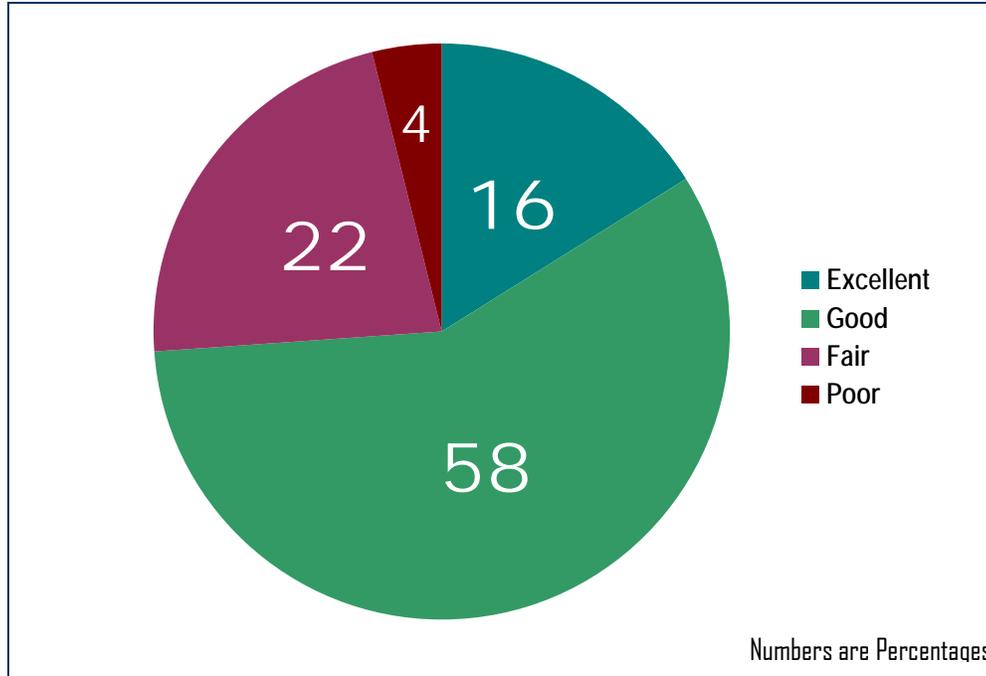
Q17 In your opinion, which of the following have been most successful for recycling/composting at this property? Please rank up to 5. [n=490]

- Building-wide infrastructure generally considered more useful than efforts targeted at individual units or residents**

 - Location of bins was seen as most important (52% ranked in top five, 20% ranked it as most important)
 - Information next important: signs, information, and bin color was ranked in top 5 by 1 in 3 each
 - More direct efforts (in-unit containers, direct incentives or talks, residents helping one another) seen as effective by less than 1 in 4 each

RECYCLING

**Recycling Seen as Successful,
But Room For Improvement**

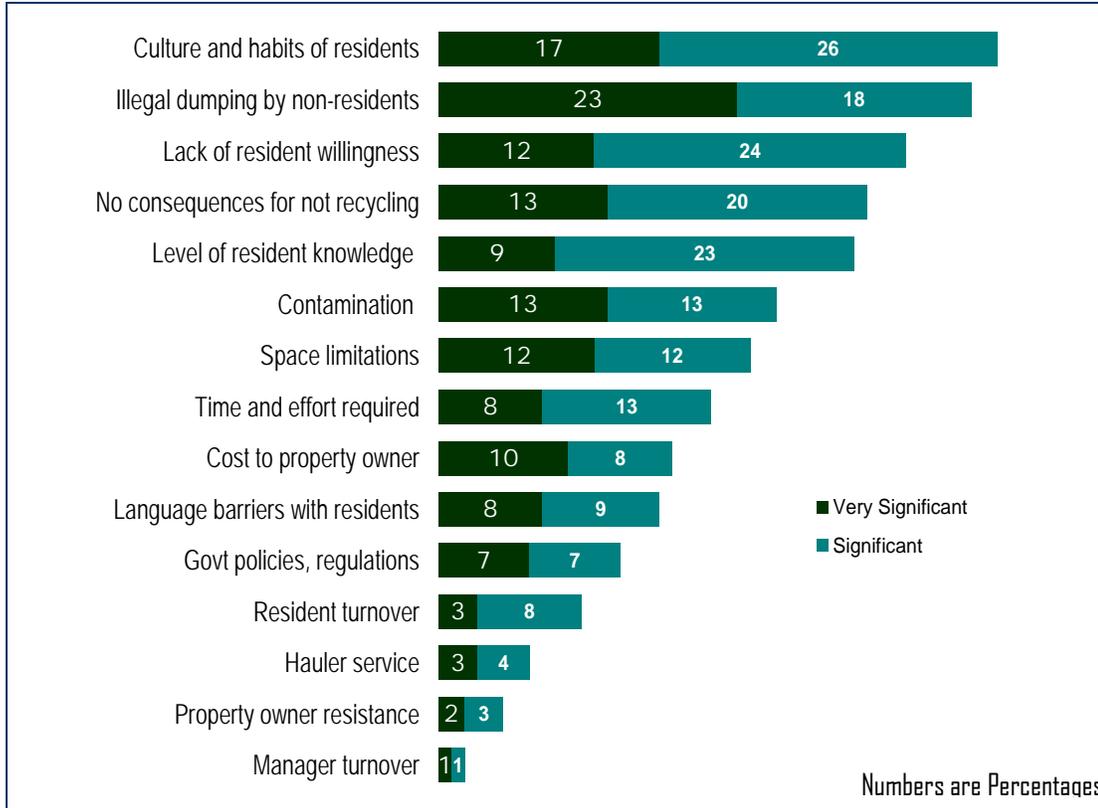


Q18 Overall, how would you say recycling is going at this property?

- **Managers rank themselves slightly higher than owners**
75% of managers replied "excellent" or "good", compared to 71% of owners

CHALLENGES

Resident Attitudes, Illegal Dumping Rated at Top of List of Challenges to Improving Recycling



Q19 The following are common challenges to improving recycling. Please indicate the significance of each challenge to improving recycling at this property.

There were some geographic differences in resident-related challenges

- King County managers (outside Seattle) were more likely than managers in other areas to cite as significant challenges:
 - Resident culture (52%), compared to 42% in Seattle and 35% in North Puget Sound;
 - Language barriers (27%). Compared to 26% in North Puget sound and 16% in Seattle;
- Resident unwillingness ranged from 49% significant in Peninsula and Southwest counties to 33% in Seattle. The other areas of the state were between 35-38%.

OPPORTUNITIES

Variety of Ways to Improve Recycling



Q20. Which of the following would most help you improve recycling at this property?

- **Managers and owners each think owner financial incentives more effective**

Among owners:

12% believed incentives for *managers* would be effective, but 40% believed incentives for *owners* would be.

Among managers:

21% believed incentives for *managers* would be effective, but 27% believed incentives for *owners* would be.

- **Differences by self-rating**

- Those rating their recycling efforts "poor" or "fair" more often indicated:

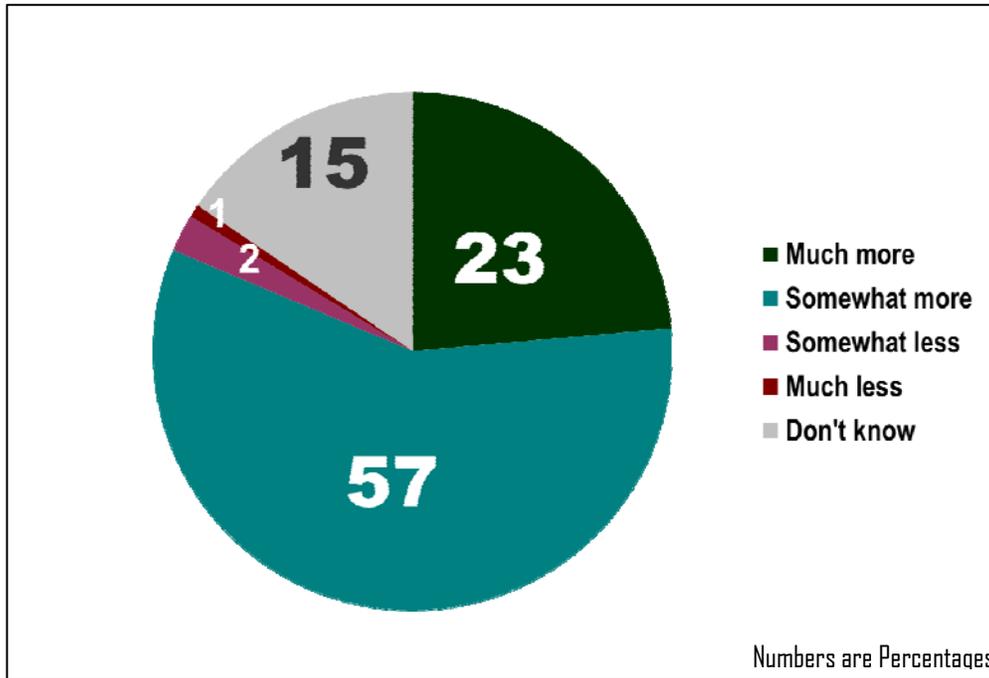
- ~ Recycling in same container (42%, v. 32% of high self-raters)
- ~ Direct financial incentives to residents (41% v. 28%)
- ~ Training for residents (28% v. 18%)

- Those saying they could do "much" more to recycle more often indicated:

- ~ Recycling in unit (38%, v. 23% of "somewhat more")
- ~ Multi-language signs (40% v. 23%)
- ~ Direct financial incentives to residents, owners, and managers

WILLING TO DO MORE?

8 in 10 Willing to do More to Encourage Recycling

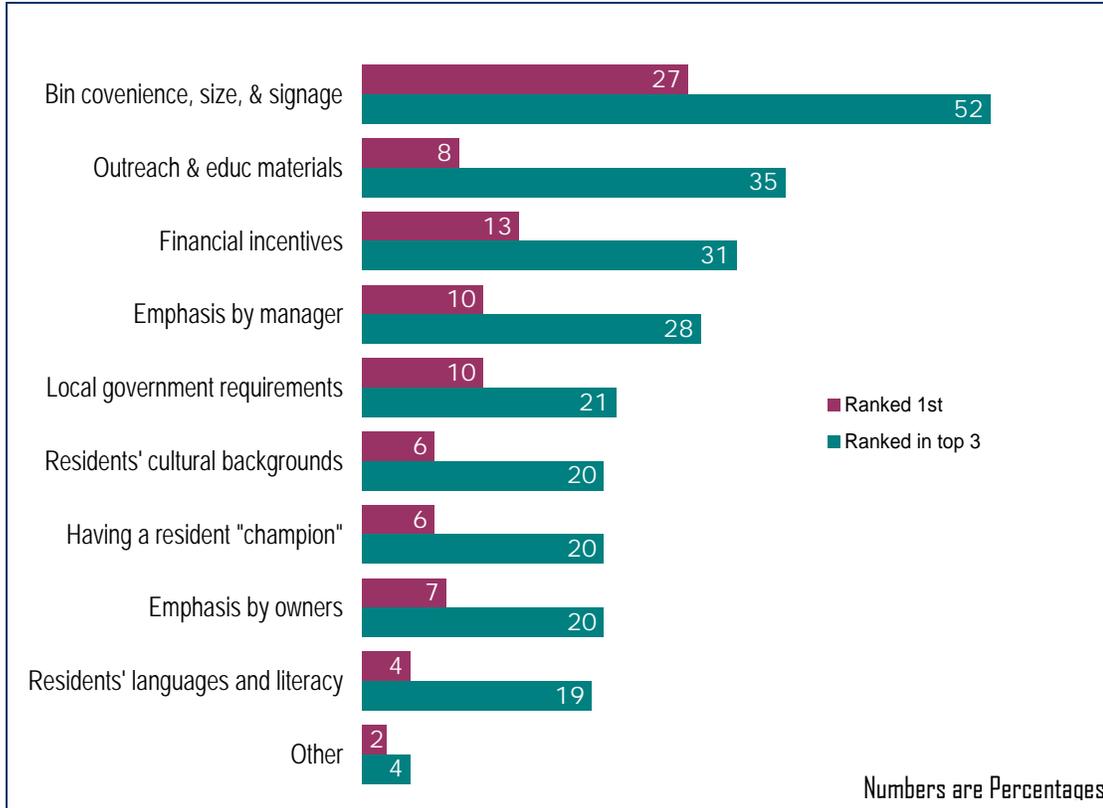


Q23. If it were up to you, would you do more or less to encourage recycling at this property?

- **Least likely to say "much more":**
 - Owners (16%, vs. 25% of managers)
 - Those in small (<20 unit) buildings (14%, vs. 28% in larger properties)

WHAT MAKES A DIFFERENCE?

Bin Convenience Makes Most Difference Between Good & Poor Recycling Properties



Q24. In your opinion, what makes the difference between properties where recycling works well and properties where it does not work well? Please rank up to 3.

- **There were some differences by property size:**
 - Education and outreach. Smaller properties (<100 units) ranked this higher than did the largest properties (100+ units). 38% of the smaller properties ranked it in the top 3 vs. 26% of the largest properties.
 - Manager emphasis. Mid-size properties (21-100 units) ranked this higher than smaller or larger properties. 38% of the 20-100 unit properties ranked it in the top 3 vs. 22% of smaller properties and 26% of larger properties.
- **Managers with both properties that do and do not recycle:**
 - Were more likely to rank financial incentives than were managers with recycling properties only. That was the only factor for which there was a significant difference between the two types of managers.
 - Were more likely than those with only recycling properties to say that recycling is not worth the money and effort that goes into it (17-3%).
 - Managers with neither recycling nor composting were more likely than those with at least one or the other to say it is not worth it (14% vs. 5%).

DISCUSSION

This first-ever statewide survey of multifamily property managers on the subject of recycling has a lot to say about what makes a successful program. As noted in the introduction, these results should be read mostly as illustrating behavior and attitudes among property managers who are already recycling. It seems reasonable to assume the managers and owners who returned this survey are more likely to have recycling programs than those who did not. Moreover, the questionnaire was designed that way – only a dozen or so questions were asked specifically of non-recyclers.

The findings point to what has worked well and what barriers exist for property managers who have already gone through the decision-making and changes that lead to offering recycling programs. As such, they offer insights for ways to expand multifamily programs.

Like most survey results, these findings are not a complete surprise, but a confirmation and extension of anecdotal understanding. The chief finding here is that there is no silver bullet. No one thing will improve recycling at multifamily properties, but a number of things working together hold great promise. The two prominent factors are convenience and education.

First and foremost is the finding that convenience is the most important factor in a successful recycling program. Throughout this survey, respondents named convenience factors – all-in-one containers of the same size, but different color from garbage containers located near garbage collection – as the most significant steps toward improving recycling. Having this composting and recycling “infrastructure” be similar also improves composting – that is, collection sites co-located, similar signage and education materials, etc.

Resident education and outreach also plays a vital role. Obviously, if residents are not aware of the recycling program and how to use it, they won't. Most of these property managers hand out informational material to residents, but fewer than half do more than that. This appears to stem partly from the belief that residents want to recycle and will do so if they just know how it is done at this property – and it is convenient.

This relative lack of active promotion runs somewhat counter to the listing of resident resistance at the top of the list of challenges to improving recycling and the list of most successful practices. Resident resistance, including cultural barriers, lack of willingness and low level of knowledge, were three of the top five rated challenges to improving recycling named by these property managers.

On the other side of the same coin, the list of most successful current practices included three information items among the top five – signs posted at collection sites, recycling information to all residents, and property managers actively promoting recycling. At least one in three managers named each of those among their top five successful practices.

Three-quarters of these property managers rated their recycling efforts as “excellent” or “good,” and yet 8 in 10 said they could do more to encourage recycling at their property.

To make the improvements they know they can, property managers need help with both the “infrastructure” and outreach aspects of recycling. Illegal dumping came up in various places as both an impediment to having a recycling program at all, and as a challenge to existing programs. Several also mentioned the need for consistent practices across jurisdictions (container size, sorting requirements, etc.).

These managers also want help with promotional materials – especially multi-cultural and multi-lingual material for their properties – as well as jurisdiction-wide education and promotion programs.

It clear that for both the “jurisdictional issues” (illegal dumping, consistent practices, consequences for not recycling) and the “support services” (education and outreach materials and training) coordination among entities and organizations will go a long way to improving recycling at Washington’s multifamily properties.



APPENDIX
