



WHICH BIN?

ADVERTISING CAMPAIGN MARKET RESEARCH HIGHLIGHTS

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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge and respect the Traditional Custodians whose ancestral lands we live and work upon and we pay our respects to their Elders past and present. We acknowledge and respect their deep spiritual connection and the relationship that Aboriginal and Torres Strait Islanders people have to Country. We also pay our respects to the cultural authority of Aboriginal and Torres Strait Islander people and their nations in South Australia, as well as those across Australia.

INTRODUCTION

This report details the findings of research undertaken for Green Industries SA (GISA) by the Ehrenberg-Bass Institute, University of South Australia. The research was conducted from September until October 2019.

The research assesses GISA's new *Which Bin?* campaign in terms of householder awareness, message outtake and claimed impact on bin system usage. The research provides direction for further campaign refinement and a better understanding of how South Australian householders use their kerbside bin system.

Which Bin? was funded from the \$12.4 million support package announced by the Minister for Environment and Water in May 2018, in response to the impact of China's National Sword Policy. It was developed in consultation with a High- Level Education Working Group and informed by a survey of 1,000 householders.

The campaign used social media, press advertising and television commercials. It was supported with public relations and face-to-face community engagement, a 1300 telephone hotline, and virtual 'helpdesk' answering 'which bin' to use through Facebook, email and a website.

Anchored by the character 'Vinnie', a passionate recycler and family members, the campaign provided easy access to a range of resources with consistent messages. Assets were extended to local councils to customise and adapt.

The *Which Bin?* campaign is well-liked and has had high cut-through amongst the target audiences. The research has given clear direction for further campaign development and shown the effective reach that has been achieved, using TV and social media as primary vehicles. It is important that these educational messages have consistency and continuity as Mental Availability takes time to build and requires reinforcing as it erodes if not refreshed.

METHOD

This research builds on waste education research undertaken for GISA by the Ehrenberg-Bass Institute in 2010, 2012 and 2014. The 2019 research consisted of:

- 803 online interviews with householders across South Australia.

- 400 bin inspections for best/poor practice - waste management is subject to poor respondent recall as well as over claiming of 'correct' behaviours.
- 10 depth interviews with councils and waste educators to measure the campaign's impact amongst its primary users.

KEY TAKE OUTS AND OPPORTUNITIES

- A high 66% of the surveyed audience felt they had gained new knowledge from the advertisement messages.
- The message importance and simplicity were the most liked aspects of the campaign.
- Half the respondents would not make any changes to the campaign, even if they could.
- There was a strong call for wider reach and repetition of the campaign.
- There were positive trends to build on relating to food waste and soft plastics recycling knowledge and behaviour.
- An area for attention is reducing the amount of recyclables incorrectly placed in the red bin.
- Many respondents presented their bins for collection even when they were not full. As an additional unnecessary cost to councils highlights an area where educational messages could be built.
- GISA is seen as a natural choice to run workshops with councils and waste educators on the principles of effective waste and recycling communication and education for behaviour change.
- Educational messages must have consistency and continuity as Mental Availability takes time to build, requiring reinforcing as it erodes if not refreshed.

BUILDING MENTAL AVAILABILITY

The *Which Bin?* campaign focuses on building mental availability for correct kerbside bin knowledge and behaviours.

Mental Availability is measured as the propensity of a correct disposal behaviour to come to mind in a choice situation. It means having the knowledge of the best disposal path to choose for an item at the point in time when you need it. Without Mental Availability, the action cannot be undertaken.

Building Mental Availability takes time and consistent messaging in order to gain cut-through and build memory structures amongst an audience. Much marketing effort is screened out by audiences as they lead their busy lives.

Communication that has emotional cut-through and likeability has a higher chance of being noticed and hence the message being encoded and retained. That is why these two measures are commonly used in evaluation of advertising campaigns.

Additionally, memories erode with time and so it is important to have continuity in message exposure to refresh and strengthen the knowledge that has been built.

Establishing a directly causal effect between advertising exposure and a resultant behaviour change is problematic. In many instances, the audience will be exposed to a message when they are not close to the relevant point of behaviour. For this reason, it is very hard to take a direct measure between exposure and behavioural change.

Instead advertising aims to nudge everyone's propensity to undertake the desired behaviour when they are next in that context. Additionally, between the point of advertising exposure and the behaviour of interest there are a myriad of other situational influences and internal and external factors affecting a person, making it hard to establish clear Return on Investment relationships between advertising and behaviour change.

Evidence such as an increase in mental availability or a claimed change in relevant behaviours act as useful proxies and are therefore used in this research to evaluate the impact of the *Which Bin?* campaign.

Which Bin? Just ask Vin! television campaign, launched Sunday May 12 2019



HOUSEHOLDER FINDINGS

INFRASTRUCTURE

The vast majority of respondents (83%) said they had access to all three kerbside bins, reflecting the efforts that have gone into standardisation of the kerbside bin system across the state.

Over two thirds of respondents (76%) said two thirds to all of household members were actively engaged in recycling efforts.



THIS SHOWS THE WIDE RELEVANCE OF MESSAGES TO HOUSEHOLDERS, AS IT IS NOT JUST THE DOMAIN OF ONE MEMBER."

Just over a third of households claimed that the recycling bin reached capacity before collection. This sets a ceiling on how much can be diverted from the landfill bin (you cannot put more in recycling if it is full) and so is a problem.

It is also of concern that the green organics bin reaches capacity before collection in almost a quarter of cases (23%), given the current focus on increasing food scrap diversion from landfill to organics.

Almost two thirds (63%) present their bins for collection even when they are not full. This is an additional unnecessary cost to councils and highlights an area where educational messages could be built.

ATTITUDES

Householders place a high level of importance on recycling. This has been a consistent sentiment across the research waves. A high 96% self-assess as knowing the bin system well. This may make them non-receptive to messages as they do not perceive they need them.

A series of attitudinal statements about recycling showed the positive and moral obligation householders feel towards recycling and how, in the main, they are willing to make the effort and feel their efforts are worthwhile.



THERE WAS ALSO HIGH WILLINGNESS TO RECYCLE EVEN MORE. THIS IS A POSITIVE FINDING AND INDICATES RECEPTIVENESS OF THE AUDIENCE."

BARRIERS TO RECYCLING

Respondents were also asked, prompted, if there was anything stopping them from recycling as much as they would like. Half the respondents perceived no barriers. Of those that did, the main barriers were bin capacity, followed by the unwillingness of other household members to assist. In 2014, 71% said there were no barriers, but the question was not prompted as the data was collected by telephone. It may be the prompting has led to differences in answers across the years. Certainly, when barriers are identified, they are of the same nature and relative rank order of frequency in both the 2014 and 2019 research.

MISSED OPPORTUNITY OR CONTAMINATE

Respondents were asked "When you are not sure if something can be recycled, are you more likely to put it in the waste bin to not risk contamination or put in the recycling bin to not miss an opportunity to recycle?". Conservativeness won out, with 80% choosing landfill over recycling.

FOOD DISCARDS AND SOFT PLASTICS

There were only 16% who claimed not to be making any attempts to recycle food scraps.

There was 41% of respondents claiming to have taken soft plastics back to a supermarket for recycling. This is more than double that of 2014 (19%).

Respondents were asked "Thinking about how much of your household's soft plastics are recycled, compared to this time last year are you recycling more, the same amount, or less soft plastic?" There was 53% of respondents who claimed they were recycling more, 37% the same amount and only 10% said less.

Respondents who said they had recycled soft plastics (41%) were asked to estimate what percentage overall of their household's soft plastic that they currently recycle back through the supermarket. The mean was 64%. There was 10% (n=31) who claimed they recycled 100%.



ALL THESE FINDINGS SHOW A POSITIVE TREND THAT CAN BE BUILT UPON."

HOUSEHOLDER FINDINGS WHICH BIN?

UNPROMPTED RECALL AND MESSAGES

Of those recalling media coverage (n=248, 31%), 48% accurately described the *Which Bin?* campaign. This is higher than the 2014 results of 26% recall amongst a comparable group.

Respondents were asked what the key message was from the campaign. This question was only asked of those who recalled seeing media coverage of waste and recycling in the last four months.



THE KEY MESSAGE RECALLED WAS THE GENERAL MESSAGE TO USE THE BIN SYSTEM CORRECTLY AND TO KNOW WHAT GOES IN EACH TO MAXIMISE OPPORTUNITIES TO RECYCLE."

This was followed by the message that recycling is worthwhile and benefits the environment. "Food scraps in the organics bin", "pizza boxes" and "Ask Vin" were also all recalled as specific messages from the media exposure, but only by a few respondents.

This ability of respondents to recall specific messages was higher in 2019 than in the 2014 *Recycle Right* research where 45% of those who had seen bin related ad or information could not recall any specifics of the message. In 2019 only 8% were in this situation.

CLAIMED BEHAVIOUR CHANGES FROM MEDIA MESSAGES

Respondents who recalled seeing some media coverage were asked if they had disposed of any items differently as a result of the media coverage. A quarter (n=60) said they had.

The main changes were around better disposal of soft plastics (25%), followed by food discards (17%), pizza boxes (13%), better practice with recyclables (10%) and then bottle lids (8%).

There was also a spread across a wide range of other options like fabric and long-life milk containers and ash (27%).

PROMPTED RECALL AND MESSAGES

A high 37% of all respondents said they recalled the campaign with just brand name prompting. 11% of those who recalled the ad could name the character correctly. This translates into 4% of all respondents which is a strong, but not atypical result seen for prior advertising performance across a range of diverse categories.

CAMPAIGN EVALUATION

All respondents were shown a series of statements about the campaign (which they had all now been exposed to even if they could not recall it without seeing it) and asked for their level of agreement with the statement using an 11-point scale where "0" meant "completely disagree" and "10" meant "completely agree".

- A high 66% of the audience felt they had gained new knowledge from the advertisement messages.
- 5% claimed to have visited the *Which Bin?* website.
- 2% claimed to have visited the *Which Bin?* Facebook page.
- Just over 1% said they had called the *Which Bin?* 1300 number.

These are all low reach activities but are still strategically important given the unique reach they provide to some audiences.



THE MESSAGE IMPORTANCE AND SIMPLICITY WERE THE MOST LIKED ASPECTS OF THE CAMPAIGN."

- Half the respondents would not make any changes to the campaign, even if they could.
- There was a strong call for more mass exposure for the campaign (i.e. broad reach media such as TV) and repetition of the campaign.

OBSERVATIONAL BIN AUDIT FINDINGS

To address poor respondent recall and overclaiming of 'correct' behaviours, 400 bin inspections were conducted across the wider metropolitan area.

RECYCLING BINS

The recycling bins were slightly fuller on presentation than they were in 2014 audits. In 2019, contamination and/or poor practice (71%) was higher than in 2014 (61%), but lower than 2012 (86%) and on par with 2010 (68%).

Plastic bags and soft/mid strength plastics were the main contaminants, followed by polystyrene and fabric.

Lids (still attached or separate) were the main poor practice observed, followed by spoiled containers.

Contaminants were visible in 58% of bins and poor practice in 41%. Overall, no contamination or poor practice was only visible in 29% of recycling bins.



GREEN ORGANICS BINS

The green organics bins were fuller on presentation than previous audits.

In the 2019 audits, less than a quarter of green bins audited contained items that were not green waste (20%). This result is lower than the 2010 audits (25%) but higher than the 2012 and 2014 audits (15% and 7% respectively).

The green bins were inspected for best practice of having food discards in them and also examined for pizza boxes (which are also appropriate for this waste stream if they have leftover food in them). There was only one pizza box seen in the audited bins. Food discards were in nearly a quarter of bins. This shows the importance of continued messaging around food discards in the green organics bin in the *Which Bin?* campaign.

LANDFILL BINS

The landfill bins appear to be presenting in a fuller state than in previous audits.

Over three quarters of the landfill bins (81%) contained items that should have gone in the recycling or green organics bins. This is an increase again on 2014 (51%).

That said, the items that can go into other waste streams have changed across the course of the research and there are now more of them (e.g. soft plastics).

Recyclables (70%), was the most prominent item that should have been in another discard bin, followed by compostable paper (33%), food scraps (21%), and garden organics (13%).

An additional category of soft plastics was added to address changes from the emergence of soft plastics collection at supermarkets and other places.

Soft plastics were visible in 77% of landfill bins, making them the most common recyclable item that appeared in the landfill bins audited.

COUNCIL AND WASTE EDUCATOR FINDINGS

The *Which Bin?* campaign is well liked by councils and waste educators.

They are a receptive audience and clearly signalled their willingness and keenness to use the campaign and supporting materials in their own waste education efforts.

“ I’VE BEEN REALLY IMPRESSED WITH THE CAMPAIGN. I REALLY LIKE THE TV ADS. I LIKE THE APPROACH. IT’S A LITTLE BIT FUN.”

“ YOU’VE GOT TO GIVE PEOPLE A SOLUTION, NOT JUST TELL THEM WHAT THEY CAN’T DO. GIVE A POSITIVE MESSAGE. BUILD KNOWLEDGE STRUCTURES ABOUT BEST PRACTICE.”

There is growing recognition that a centralised, consistent and continuous approach to waste education is needed to affect change and that this will never be achieved while councils work in disparate ways.

That said, some still insist on the development of their own materials, creating the potential for market confusion and mixed messages.

There is a real opportunity for GISA to run workshops with councils and waste educators on the principles of effective waste and recycling communication and education for behaviour change and to use the results of this research to illustrate and allow them to share their own skills and experiences in this area. This will result in better collaboration moving forward.

GISA is seen as a natural choice to take the leadership role in the waste education of householders, but they need to further improve their communication channels with councils and waste educators to work even more effectively in this space.

There was consensus that negative messages (i.e. saying not what not to do) should be avoided. The focus should be about where things go rather than where they should not.

RECOMMENDATIONS

The *Which Bin?* campaign is well-liked and has had high cut-through amongst the target audiences.

The research has given clear direction for further campaign development and shown the effective reach that has been achieved, using TV and social media as primary vehicles.

Given the effectiveness and likeability of the creative, it is recommended that the *Which Bin?* campaign continue to be used to build improved knowledge of the kerbside bin system and other recycling paths and to bring cost efficiencies through reuse of creative.

It is important that these educational messages have consistency and continuity as Mental Availability takes time to build and requires reinforcing as it erodes if not refreshed.



WHICH BIN? CASE STUDY

BACKGROUND

In July 2018 GISA commissioned a survey of 1,000 South Australians examining their level of recycling knowledge, potential barriers and existing brand awareness on recycling and bin behaviour.

The research provided a snapshot of knowledge, attitudes and behaviours towards household recycling and identified a preference that any campaign would unify and simplify recycling communications.

The market research highlighted that recycling advice is often inconsistent and variable depending on the suburb, council and waste management service provider.

Based on this research, and the input from the industry and local government working group a strategic marketing campaign was developed.

Showpony Advertising was appointed to develop an advertising campaign. An integrated marketing campaign was planned with the government's master media agency Wavemaker, and a schedule for press, outdoor, television and digital advertising was delivered from May 2019 to July 2019.

Post-campaign evaluation the campaign (brand awareness, knowledge and observed behaviour change) was undertaken by the Ehrenberg-Bass Institute for Market Science. Pre-campaign brand awareness and knowledge assessment was undertaken by The Planning Exchange.



WHICH BIN? CASE STUDY

CAMPAIGN OBJECTIVES

1. To increase correct knowledge about which bin residents should (and should not) use for disposing of specific items or materials from 50% to 60%
2. To increase awareness of the impact of contamination (ie putting the incorrect items or materials in the green lid and yellow lid bins) on recycling from 25% to 35%
3. To increase awareness of alternate options for disposal or recycling of materials such as the container deposit scheme for beverage containers from 50% to 60%
4. To reduce food waste and organic material placed in the residual waste bin in preference for the green bin from 30% to 20%
5. To reduce contamination (incorrectly placed items or materials) in the yellow co-mingled recycling bin by 10%

CAMPAIGN STRATEGY

The *Which Bin?* recycling education campaign has multiple integrated elements. These include social media, press advertising and television commercials, all supported through public relations and face-to-face community engagement, a 1300 telephone hotline, and virtual 'helpdesk' answering 'which bin' to use through Facebook, email and a website.

Anchored by the character of 'Vinnie', a passionate recycler and his family as the faces of the *Which Bin?* campaign, the strategy was to provide easy access to a range of audiences, with overlap and consistency, including assets available to local councils to customise and adapt for their residents, further entrenching and establishing the brand, and promoting the *Which Bin?* hotline (1300 137 118) and website (whichbin.sa.gov.au) as the consolidated locations to get fast, accurate answers on which bin to use.

TELEVISION COMMERCIALS

Four television commercials (TVC) addressing common recycling issues that could be improved by householders were produced on the following topics:

1. Food waste in the green bin instead of the waste bin
2. Soft plastics should never go in the yellow bin, and they can go back to supermarkets that provide soft plastic recycling
3. Containers with a 10 cent deposit don't have to go in your yellow bin, they can go back to a depot for cash
4. Recycling is easy. Cans, bottles and packaging can all go in your yellow bin, just give containers a quick rinse.



WHICH BIN? CASE STUDY

SOCIAL MEDIA

The TVCs were also supported with a social media campaign, entrenching the brand message and design, and extending on the simplicity that small changes can make. 10 second 'Which Bin?' advice animations were developed for YouTube and Facebook, with quizzes developed to BuzzFeed, and native content delivered through Plista.

Video and animation campaign messages included:

1. Keep clothing and fabric out of the yellow bin
2. Take e-waste back to an electronics recycler
3. Put food waste in the green bin
4. Take soft plastic back to a supermarket that recycles
5. Put shredded paper in the green bin, not the yellow bin

YouTube campaign activity exposed the audience to the same messages, customised for the YouTube platform, including 'skippable' content that meant GISA was only charged if a user viewed 100% of the campaign message.

Plista campaign activity delivered content as inline native website ads.

Buzzfeed campaign activity used two different quizzes on the BuzzFeed website and their distributed channels, encouraging people to test their recycling knowledge and share results on how well they knew which bin to use.

SheShopped used three long form content pieces were also produced through She Creative addressing the core messages of food waste, waste avoidance, and more mindful consumption and disposal. She Creative also developed Instagram stories and web content from the videos.

The three videos and supporting social media campaign reaching 61,298, 32,193 and 55,971 people respectively. The first video and supporting content targeting food waste/green bin video was reported by SheCreative as the highest engagement content for the year to date at the time of reporting.

PIZZA BOXES – SITUATIONAL BEHAVIOUR CHANGE

Pizza boxes present a unique challenge. Composed of cardboard, these are easily recyclable through the yellow bin. However when the boxes are stained with oil or left over cheese or crusts, they're not suitable for the yellow bin. These can still be composted and treated as food waste and placed in the green bin.

In an effort to educate and reduce confusion and contamination, messages were developed and trialled inside pizza box lids through MediaNest, with 14,000 pizza boxes being supplied to independent pizza outlets across metropolitan Adelaide. The message specifically advised on placing greasy or pizza boxes with left overs in the green bin, and only clean, dry pizza boxes in the yellow bin. While challenging to measure, it was seen as a worthwhile message placement to deliver situational advice at the point where the confusion occurs: inside the pizza box.



Pizza box messaging with situationally relevant advice, right at the prime point of behaviour and consumption to increase receptiveness and increase knowledge while delivering brand consistent creative content.

COUNCIL ASSETS

GISA produced branded *Which Bin?* education and communication assets developed to enable strong buy-in from front line staff in local government and to ensure easy and consistent deployment.

Designing a range of practical resources under the *Which Bin?* brand was an important strategy to centralise and simplify the amount of brands, messages and advice householders are exposed to. *Which Bin?* branded waste collection calendars, advice posters, flyers and bin stickers have been adopted by councils and waste educators across the state since.

Councils which proactively expanded the range of branded assets included:

- Cleanaway, Peats and Whyalla Council for the Whyalla Show with focus on food waste recycling
- Customised advertisement for Unley Council residents' magazine
- Street banner (12m X 2m) designed for use across Unley Road on food waste. Access above Unley/King William/Goodwood Roads is strictly controlled by council with bookings set a year in advance given high demand.



Banner installed across one of Adelaide's busiest roads by the City of Unley: refreshing behaviour and embedding brand and character in multiple contexts - TV, print, mobile phones and outdoor billboard and banner advertising.

RESULTS

Coverage and engagement overachieved in relation to interactions and awareness. TVCs, Buzzfeed and Facebook performed well above expectations and industry benchmarks provided by Wavemaker and end of campaign reports from Buzzfeed, SheShopped, Facebook and Wavemaker's reporting on TVC performance.

- The **TVC campaign** over delivered by 31.9% on planned TARPs, with a unique reach of 414,966 people aged 25-44 in South Australia. The TVC media strategy set a targeted frequency of views of 5.8-6.3 times, with an actual rate of 11.2 times achieved.
- The Ehrenberg-Bass Institute for Market Science reported that over 40% of those surveyed (n=803) recalled seeing the campaign commercials, with a *high degree of likability and importance* with mean of 8.4 agreeing with the statement that it warranted being on TV and a mean of 7.9 agreeing the campaign made it easier to recycle.
- **Facebook campaign activity** saw more than 2.7 million impressions delivered, with the CPM planned at \$10. The actual CPM was \$7.63. From May 16 – July 6 2019 the campaign content reached 641,274 unique users, approximately 4.29 times each. The most popular engagement campaign topic on Facebook was the 'shredded paper' message.
- **YouTube campaign activity** exposed the audience to the same messages, customised for the YouTube platform, including 'skippable' content that meant GISA was only charged if a user viewed 100% of the campaign message. The most popular 'fully played' campaign content on YouTube was the e-waste message content.
- **Buzzfeed campaign activity** - 44,630 total views, with organic (unpaid) views very high at 12,780 views, noted by Buzzfeed as well above their average. The quizzes delivered 2,061 total engagements and 'dwell time' also well above the Buzzfeed benchmark of 57 seconds, with both quizzes averaging between 72 and 81 seconds.
- **Plista campaign activity** - 1,586,746 unduplicated unique users, who saw the content approximately 5.44 times.
- **SheShopped** - the three videos and supporting social media campaign reached 61,298, 32,193 and 55,971 people respectively. The first video and supporting content targeting food waste/ green bin video was reported by SheCreative as the highest engagement content for the year to date at the time of preparing the report.