

# The **Morris** **Leatherman** Company

## 2019 CITY OF SHOREWOOD RESIDENT SURVEY OF TRASH RECYCLING SERVICES

### *SUMMARY OF FINDINGS*

**Trash Haulers:**

Respondents were initially asked:

*Thinking specifically about your trash hauler....*

*How many years have you used your current trash hauler?*

The median longevity of use of their current trash hauler is 6.9 years.

<i>Years of Use of Current Trash Hauler</i>	<i>Percent</i>
Less than one year	3%
One to two years	12%
Three to five years	27%
Six to ten years	31%
11 to 20 years	16%
Over 20 years	11%
Don't know/refused	1%

Fifteen percent used their current trash hauler for two years or less. Twenty-seven percent have done so for 3-5 years, while 31% have used their trash hauler for 6-10 years. Sixteen percent report using their current haulers for 11-20 years, and 11% did so for over 20 years.

Next, respondents were asked:

*Have you ever changed the trash hauler.*

Thirty-seven percent changed their hauler in Shorewood:

<i>Changed Trash Hauler Used in Shorewood</i>	<i>Percent</i>
Yes	37%
No	63%
Don't know/refused	0%

Sixty-three percent have not done so.

Respondents reporting a change were asked:

*Why did you decide to change?*

<b>Reasons for Decision</b>	<b>Percent</b>
Lower cost	64%
No longer in business	9%
Rude drivers	5%
Poor service	5%
Unresolved dispute	3%
Missed pick-ups	3%
Same hauler as neighbors	2%
Scattered	5%
Don't know/refused	4%

The dominant reason for switching hauler is to “lower cost,” at 64%. Five percent each posted “rude drivers” or “poor service.”

Next, residents were queried:

*Currently, residents are allowed to choose one of four trash hauling companies licensed by the City.*

*How would you rate the service provided by your trash hauling company – excellent, good, only fair, or poor?*

<b>Rating of Current Trash Hauler</b>	<b>Percent</b>
Excellent	45%
Good	53%
Only fair	1%

Ninety-eight percent post favorable ratings of their current trash hauler; in fact, 45% rate them as “excellent.” Only one percent post a critical rating.

Respondents were asked:

*What do you like most about the service provided by your trash hauling company?*

The most often response, at 36%, is “timely/regular pickup.”

<b>Like Most about their Trash Haulers' Service</b>	<b>Percent</b>
Timely/regular pick-up	36%
Reasonable cost	15%
Friendly drivers	12%
Clean	12%
Good service	5%
Good communication	4%
Return cart to proper place	3%
Retrieve cart when forgotten	2%
Take extra items at no charge	2%
Careful driving	2%
Unsure	8%

Fifteen percent mention “reasonable cost,” while 12% each post “friendly drivers” or “clean service.”

Next, the value of the trash hauling service was considered:

*When you think of the cost you pay for trash hauling and the service you receive, how would you rate the value – excellent, good, only fair, or poor?*

Ninety-three percent see a positive value; in fact, 29% call it an “excellent value.”

<b>Value of Trash Hauling Service</b>	<b>Percent</b>
Excellent	29%
Good	64%
Only fair	8%

Eight percent, though, see the value as “only fair.”

Finally, the importance of being able to choose their own vendor was considered:

How important is it to you to be able to choose your trash hauling company – is it very important, somewhat important, not too important, or not at all important?

Seventy-six percent see the choice as at least “somewhat important;” forty-five percent consider it to be “very important.”

<b>Choosing Your Hauling Company</b>	<b>Percent</b>
Very important	45%
Somewhat important	31%
Not too important	17%
Not at all important	6%
Don’t know/refused	2%

Twenty-three percent, though do not consider the choice to be “important.”

**Change to City-Managed Trash Collection:**

Respondents were told:

*Most communities have one of two systems for trash collection. Shorewood has an open collection system, where residents choose any of the haulers licensed by the City. Some cities use a collection system in which the City manages the system, negotiates prices and standardizes service for residential trash collection.*

They were then asked:

*Would you favor or oppose the City of Shorewood changing from the current system in which residents are free to choose their trash hauler to a system where the City manages trash collection? Do you feel strongly that way?*

By a 61%-25% majority, Shorewood residents **oppose** the change to a City-managed trash collection system.

<b><i>Changing from Current Trash Collection System</i></b>	<b><i>Percent</i></b>
Strongly favor	12%
Favor	13%
Oppose	32%
Strongly oppose	29%
Don't know/refused	14%

Intense opposition is over twice as high as intense support.

- Groups much more in favor include:
- Less than five years use of current hauler
- Less than five years residential longevity
- 18-34 year olds
- Precinct 3 residents

Groups much more opposed include:

- Over six years use of current hauler
- "Excellent" rating of current hauler
- Over ten years residential longevity
- Seniors in household
- 55 year olds and older

Respondents taking a position were then asked:

*Could you tell me one or two reasons for your decision?*

The key reason for support of a change is "less truck traffic," at 18%.

<b><i>Reason for Position</i></b>	<b><i>Percent</i></b>
Less truck traffic	18%
Cheaper price	3%
City deals with problems	3%
Want choice	32%
Like current hauler	21%
Best price with competition	12%
Best service with competition	9%
Scattered	2%

The key reasons for opposition to a change are "want to make the choice of haulers" and "like my current hauler." Two secondary reasons revolve around competition: "best price through competition," at 12%, and "best service through competition," at nine percent.

Next, respondents were told:

*I would like to read a list of aspects of trash collection. For each one, please tell me if you think it is better under an open collection or a city-managed collection system. Do you feel strongly that way? If you have no opinion, just say so....*

A short list of four aspects of trash collection were then read. The table below arrays each aspect with the percent who think an open system would do a better job, and the percent who think a city-managed system would do better.

<b>Aspect of Trash Collection</b>	<b>Open System</b>	<b>Managed System</b>
Cost for trash collection	76%	17%
Pollution from trucks	31%	50%
Customer service	68%	20%
Pedestrian safety	25%	35%

An open system is clearly thought to be better for holding down the cost of collection and providing the best customer service. A city-managed system is view as better in reducing pollution from trucks. With respect to insuring customer safety, a plurality opts for a city-managed system, but 30% are unsure which system would be preferable.

### **Curbside Recycling Program:**

Shorewood residents were initially asked:

*Do you participate in the curbside recycling program by separating recyclable items from the rest of your garbage?*

Ninety percent report they participate in the program.

<b>Participation in Curbside Recycling Program</b>	<b>Percent</b>
Yes	90%
No	10%
Don't know/refused	0%

A majority of non-participants stated one of three reasons for their behavior: "not interested," at 38%; "not enough items," at 36%; and, "no need," at 12%. Twelve percent of non-participants indicated "weekly pick-up" could induce them to participate in the program.

Program participants were next queried:

*How would you rate the recycling service – excellent, good, only fair, or poor?*

Ninety-three percent rated the service favorably; in fact, 36% rated it as "excellent."

<b>Rating of Curbside Recycling Program</b>	<b>Percent</b>
Excellent	36%
Good	57%
Only fair	6%

Only six percent were more critical in their evaluations. A majority of “only fair” ratings stemmed from one of three reasons: “every other week pick-up,” at 32%; and, “missed pick-ups” or “take limited variety of items,” each at 23%. Only one suggested change or improvement in the program reached a statistically significant threshold, “weekly pick-ups,” at five percent.

**Organics Collection:**

Residents were reminded:

*As you may know, Shorewood has begun a voluntary curbside collection program for compostable waste called “organics,” such as food scraps and non-recyclable paper. Currently only one trash hauler offers organics collection to their Shorewood customers.*

They were queried:

*Do you participate in organics collection?*

Seventeen percent reported participation in organics collection.

<b>Participation in Organics Collection</b>	<b>Percent</b>
Yes	17%
No	83%

Next, respondents were informed and then asked:

Beginning in 2022, Hennepin County will require organics to be collected and recycled. Shorewood will have the option of requiring haulers to collect it curbside or establish an organics recycling drop-off site.

Which options do you most prefer for organics collection – curbside collection or recycling at a drop-off site? Do you feel strongly that way?

By a 48%-15% margin, residents prefer a curbside collection system.

<b>Preference for Organics Collection System</b>	<b>Percent</b>
Curbside/strongly	24%
Curbside	24%
Drop-off	7%
Drop-off/Strongly	8%
Neither (vol.)	30%
Don't know/refused	8%

Intense support for a curbside collection system is three times higher than intense support for a drop-off site. But, 30% volunteered they prefer neither alternative. The two main reasons for supporting a

curbside pick-up program are “more convenient,” at 48%, and “easy to collect with trash and recycling,” at 21%. The major reason for supporting a drop-off site is “no bad odors in neighborhood,” at nine percent.

“Curbside pick-up” is chosen much more frequently by:

- 3-5 years use of current hauler
- “Only fair” rating of hauler
- 2-10 years residential longevity
- Children in household
- Women
- Precinct 1 residents

“Drop-off site” is preferred much more often by less than one-year users of current hauler

Neither option” is indicated more frequently by:

- Over 20 years use of current hauler
- “Excellent” or “good” rating of current hauler
- Over 20 years residential longevity
- Seniors in household
- Single adult households
- 65 years old and older
- Men

**Spring and Fall Clean-Up Curbside Pick-Up Program:**

Shorewood interviewees were informed:

*Some cities offer residents a Spring and Fall Clean-Up Curbside Pick-Up Program for a fee. Materials that could be picked up include old appliances, electronics or other large items.*

They were then asked:

*Do you support or oppose the City of Shorewood offering this type of program for an additional fee? Do you feel strongly that way?*

By a 71%-19% majority, residents favor the City offering this type of program for an additional fee.

<b><i>City Offers Clean-Up Collection Days for an Additional Fee</i></b>	<b><i>Percent</i></b>
Strongly support	37%
Somewhat support	34%

<b><i>City Offers Clean-Up Collection Days for an Additional Fee</i></b>	<b><i>Percent</i></b>
Somewhat oppose	10%
Strongly oppose	9%
Don't know/refused	10%

Intense support is over four times as high as intense opposition.

Support is highest among:

- Less than five years use of current hauler
- Less than 10 years residential longevity
- Households containing children
- 18-44 years old
- Women

Opposition increases among:

- Over six years use of current hauler
- Over 20 years residential longevity
- Seniors in households
- 65 years old and older
- Precinct 2 residents

Then, respondents were queried:

*If a Spring and Fall Clean-Up Curbside Pick-Up Program were available, how likely would your household be to participate in it – very likely, somewhat likely, not too likely, or not at all likely?*

Thirty-three percent report they are “very likely” to participate, while 31% are “somewhat likely” to do so.

<b><i>Participation in a Spring and Fall Clean-Up Pick-Up Program</i></b>	<b><i>Percent</i></b>
Very likely	33%
Somewhat likely	31%
Not too likely	14%
Not at all likely	17%
Don't know/refused	6%

Using standard market projection techniques, 25% of city households can be expected to participate after widespread program launch publicity.

**Respondent Demographics:**

Residents were asked:

*Approximately how many years have you lived in the City of Shorewood?*

The median longevity of adult Shorewood resident is 13.3 years.

<b><i>Residential Longevity</i></b>	<b><i>Percent</i></b>
Less than two years	6%
Two to five years	18%
Six to ten years	21%
11 to 20 years	20%
21 to 30 years	18%
Over thirty years	17%

Twenty-four percent resided in the community for five years or less, 21% for six-to-ten years, 20% for 11-to-20 years, 18% lived there for 21-30 years, and 17%, for over 30 years.

Respondents were next instructed:

*Could you please tell me how many people in each of the following age groups live in your household? Let's start with the oldest. Be sure to include yourself.*

*First, persons 65 years old or over?*

Twenty-eight percent report the presence of a senior in their household.

<b><i>Seniors in Residence</i></b>	<b><i>Percent</i></b>
None	72%
One	14%
Two or more	14%

Senior couples and single seniors are equally represented in the sample

*Adults under 65 years old?*

Sixty-two percent of Shorewood households contain two adults.

<b><i>Non-Senior Adults in Residence</i></b>	<b><i>Percent</i></b>
None	17%
One	14%
Two	62%
Three or more	7%

Seventeen percent of households are exclusively composed of senior citizens.

*School-aged children or pre-school children?*

Thirty-four percent of households contain children.

<b><i>Children in Residence</i></b>	<b><i>Percent</i></b>
None	66%
One	12%
Two	18%
Three or more	4%

Household containing children are much more apt to contain two or more.

Next, respondents were asked:

*What is your age, please?*

The median age of adult Shorewood residents is 50.2 years old.

<b><i>Age of Respondent</i></b>	<b><i>Percent</i></b>
18-34	18%
35-44	21%
45-54	21%
55-64	20%
65 and over	21%

Thirty-nine percent report ages under 45 years old, 21% are between 45 and 54 years old, and 41% post ages of 55 years old and older.

The gender of each respondent was noted.

<b><i>Gender of Respondent</i></b>	<b><i>Percent</i></b>
Male	49%
Female	51%

Women outnumber men by two percent of the sample.

The precinct of residents was also note.

<b><i>Precinct of Residence</i></b>	<b><i>Percent</i></b>
Precinct One	3%
Precinct Two	31%
Precinct Three	28%
Precinct Four	39%

The smallest precinct, Precinct One, is three percent of the sample, while the largest precinct, Precinct Four, is 39% of the sample.

## **Conclusions:**

1. Residents rate their current trash haulers highly: 95% post favorable service ratings while only one percent is more critical. The average longevity with their current hauler is 6.9 years; even so, 37% report they have changed their trash hauler while residing in Shorewood. Cost-versus-service value ratings are also high: ninety-three percent favorable, and only eight percent more critical. And, not surprisingly given these high ratings, 76% report that the ability to choose their trash hauler is at least “somewhat important;” forty-five percent see it as “very important.”
2. At the present time, there is significant opposition to changing from the current open system of trash collection to a city-managed collection system. An information campaign based upon pollution for many trucks and pedestrian safety could move undecided residents into support of a city-managed system; but, the obstacle to major change is the perception that competition in an open collection system results in cost-containment and better customer service.
3. Participation in the curbside recycling program is already at 90% among households individually retaining a trash hauler. A very small additional one percent of Shorewood households could be induced to participate if weekly pick-up were instituted. Participants rate the recycling service highly, with 93% favorable ratings and only six percent more critical.
4. Seventeen percent of residents participate in organics collection. In light of the Hennepin County mandate, support is high for a curbside collection system of organics rather than the provision of a drop-off site. But 30% prefer neither alternative, also opposing the County mandate.
5. Significant support, almost three-to-one in favor, exists for the City of Shoreview offering a Spring and Fall Clean-Up Curbside Pick-Up program for an additional fee. If the City offers this program, 24% of community households can be projected as initially participating.

## ***Methodology:***

This study contains the results of a telephone survey of 400 randomly selected residents of the City of Shorewood. Survey responses were gathered by professional interviewers across the community between March 5th and 19<sup>th</sup>, 2019. The average interview took 10 minutes. The non-response rate was 4.0%. All respondents interviewed in this study were part of a randomly generated sample of Shorewood residents reporting the household individually retained a trash hauler. In general, random samples such as this yield results projectable to their respective universe within  $\pm 5.0$  percent in 95 out of 100 cases.