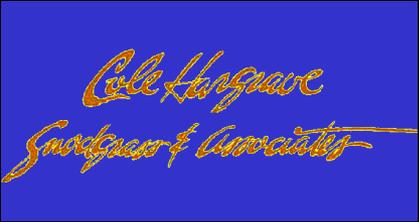


Briefing
OCEAT 03-15
Solid Waste Services
Project Update

May 5, 2015

Discussion Points

- Public survey results
- Existing solid waste services
- Status of current SCS study
- Alternative service options
- Issues
- Solid waste collection RFP



A Survey of 600 Residents of Oklahoma City

Margin of error: +/- 4.9%

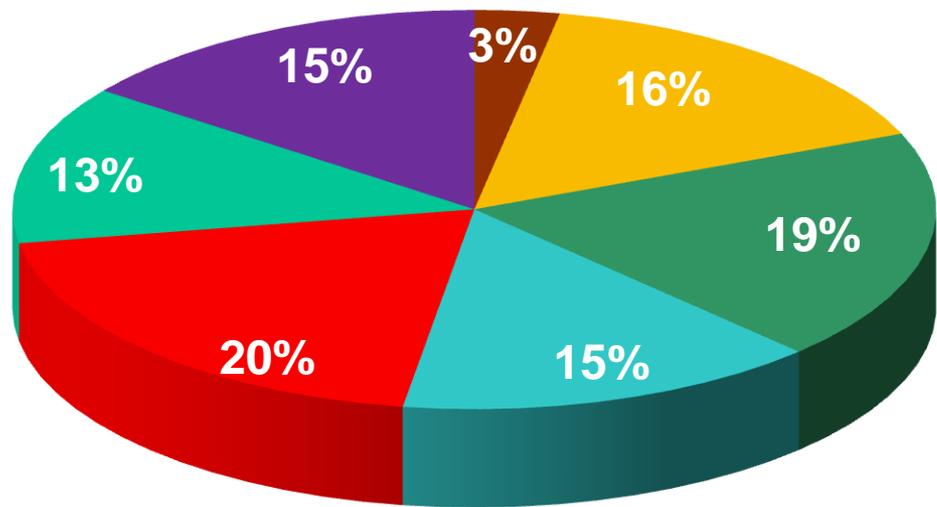
Interviewing Conducted

March 9 - 15, 2015

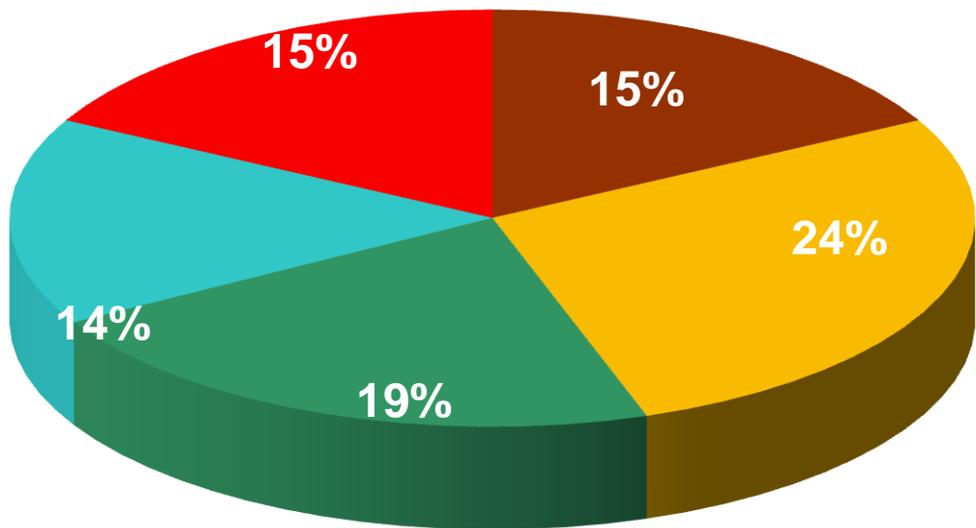
by

*Cole Hargrave
Snodgrass & Associates*

Demographics

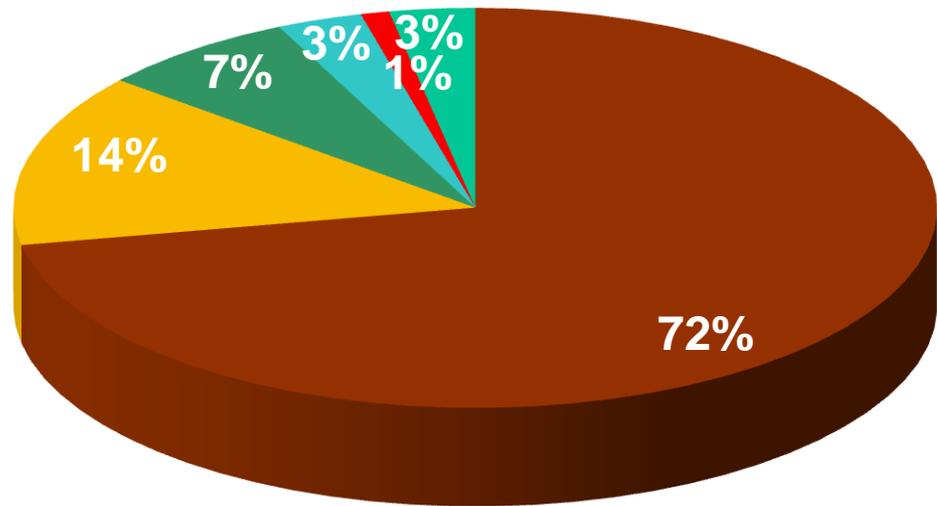


- ### Age
- 18-24
 - 25-34
 - 35-44
 - 45 - 54
 - 55 - 64
 - 65 - 74
 - 75 & Over

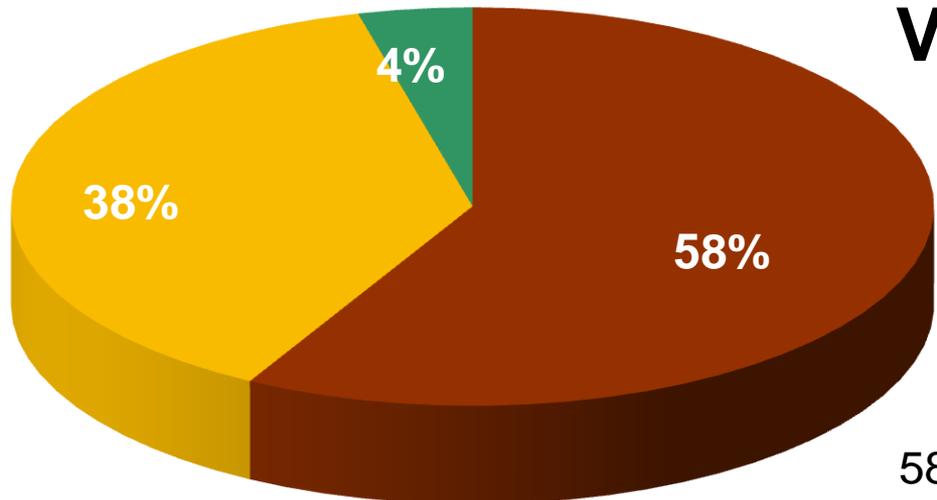


- ### Income
- Under \$25k
 - \$25-\$50k
 - \$50-\$75k
 - \$75-\$100k
 - Over \$100k

Demographics



- ### Race
- White
 - African American
 - Hispanic
 - Native American
 - Asian
 - Ref.



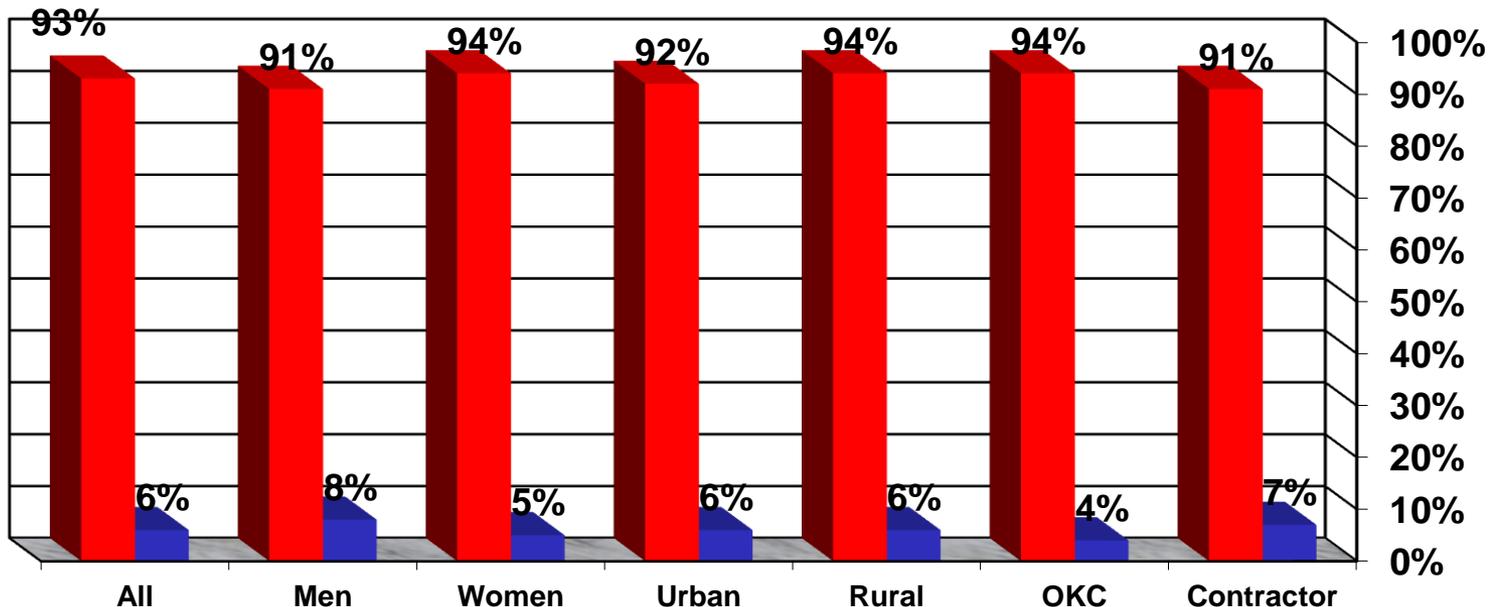
- ### Visited OKC.gov
- Yes
 - No
 - Can't Remember

58% visitation is the exact same percentage we had on this question in May 2014.

Trash Service Satisfaction

61% Very Satisfied; 32% Somewhat Satisfied; 5% Somewhat Dissatisfied; 1% Very Dissatisfied; 1% Undecided

■ Satisfied ■ Dissatisfied



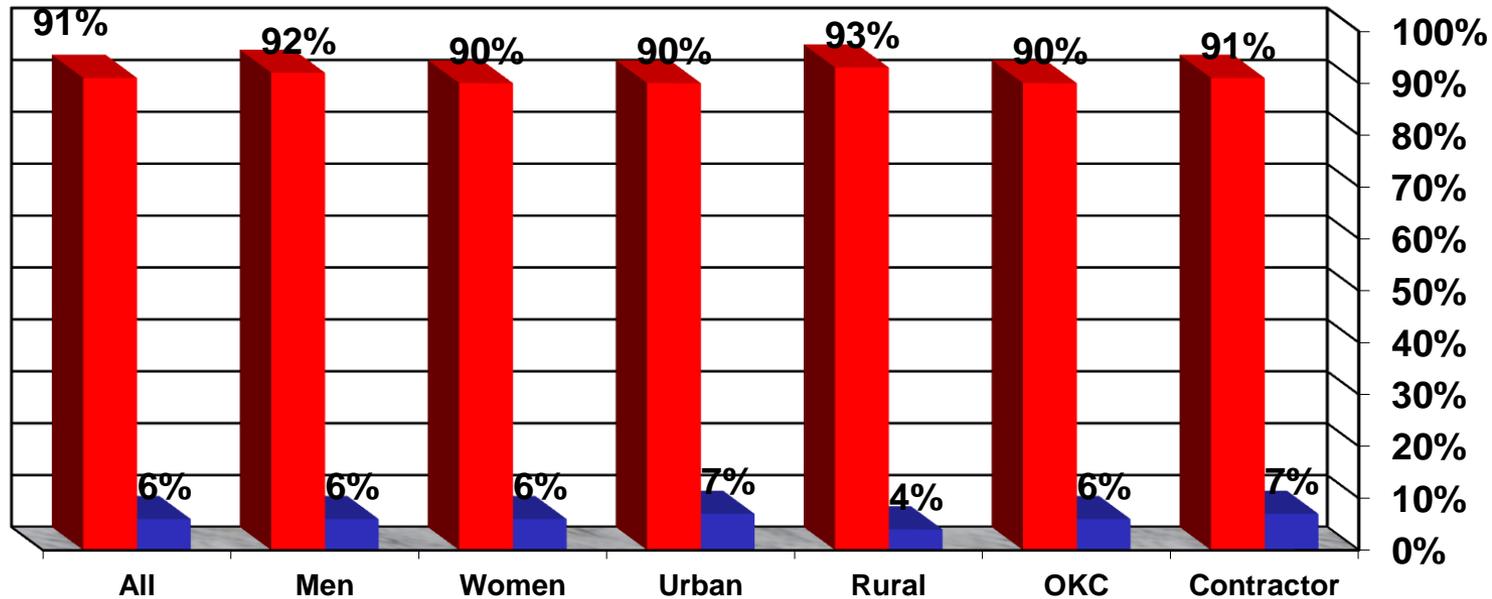
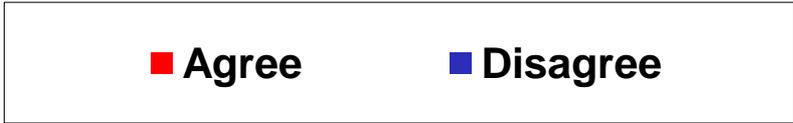
More than 90% satisfaction is a very high number – perhaps most impressive is that 61% are “very satisfied.” Here, we do see a slight difference between those served by the City and those served by a contractor.

While the urban and rural look the same, there is a difference in that 62% of urban customers say they are “very” satisfied and only 51% of rural customers say likewise.

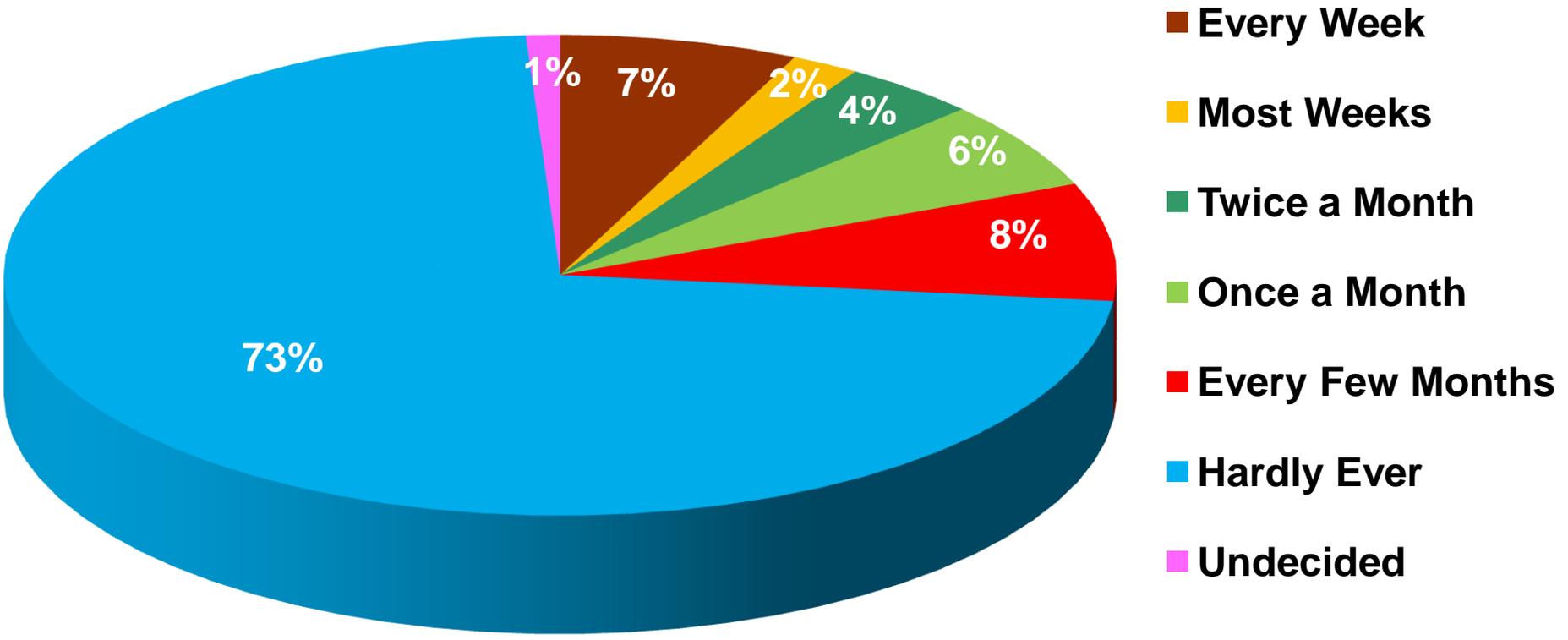
Pleased Blue Carts

The Big Blue carts have been almost universally accepted.

63% Strongly Agree; 28% Somewhat Agree; 3% Somewhat Disagree; 1% Strongly Disagree; 3% Undecided



How Often Use Bag Disposal?



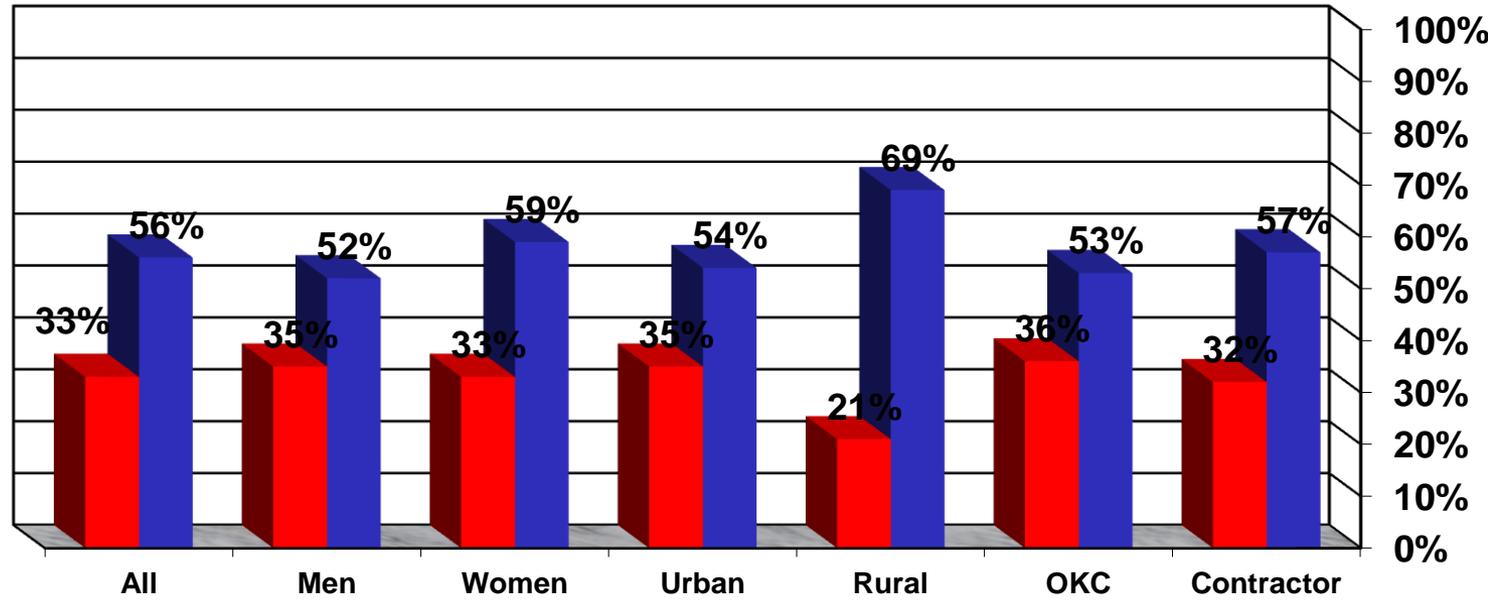
Relatively few residents use bags on a regular basis.

Pay as You Throw?

Initial reaction to “pay as you throw” is not positive. We see a higher negative among rural customers than urban ones.

(Note: City currently uses a PAYT approach with additional charge for the third cart)

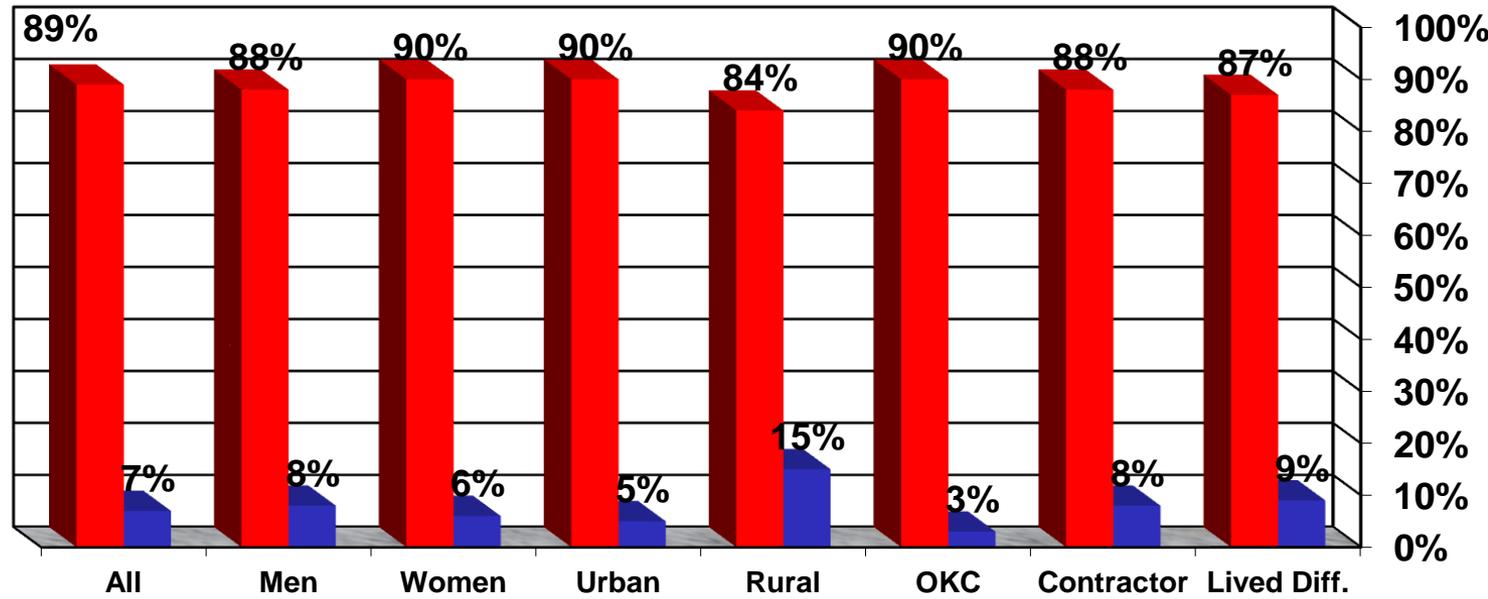
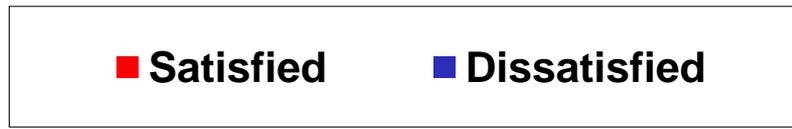
16% Strongly Favor; 17% Somewhat Favor; 15% Somewhat Oppose; 41% Strongly Oppose; 11% Undecided



Satisfied Bulky Waste Pickup?

Again, we see tremendous satisfaction – and again, we see the city provided service doing only slightly better than that of the contractor.

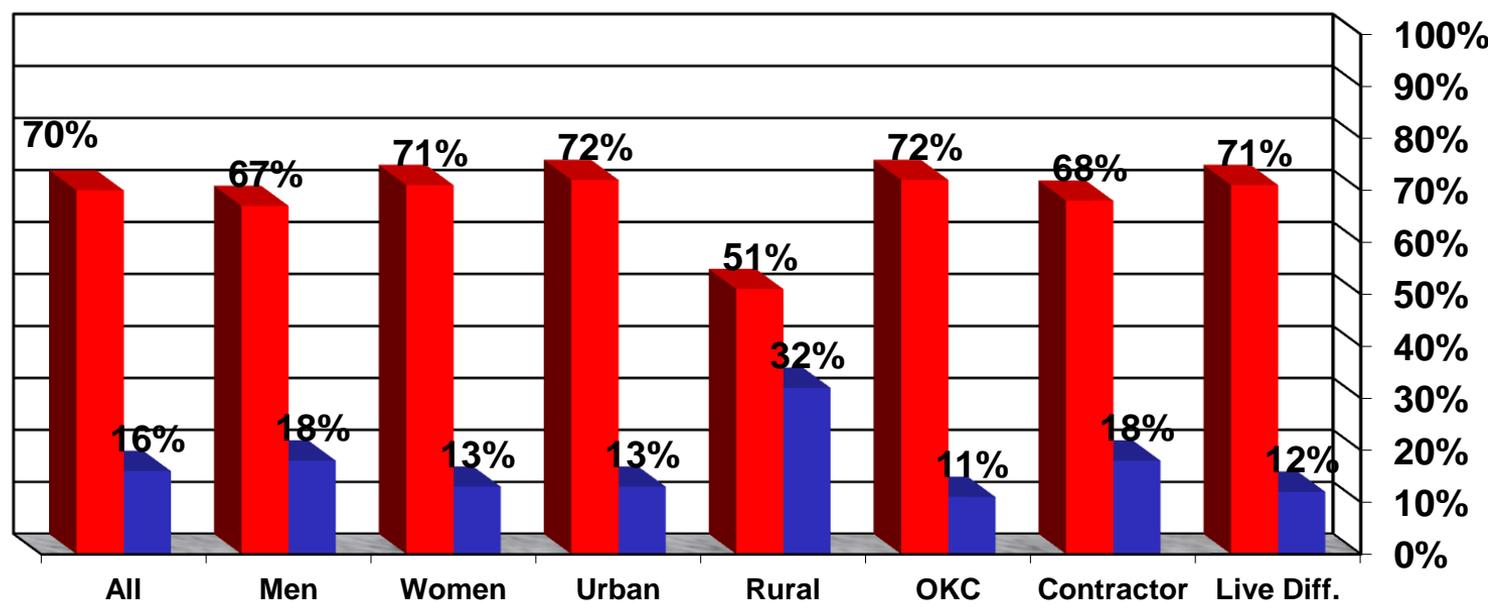
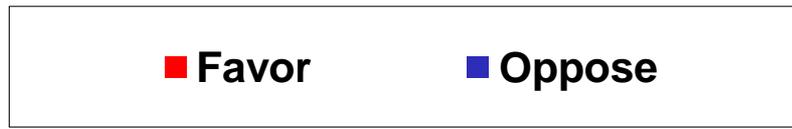
59% Strongly Favor; 30% Somewhat Favor; 4% Somewhat Oppose; 3% Strongly Oppose; 3% Undecided



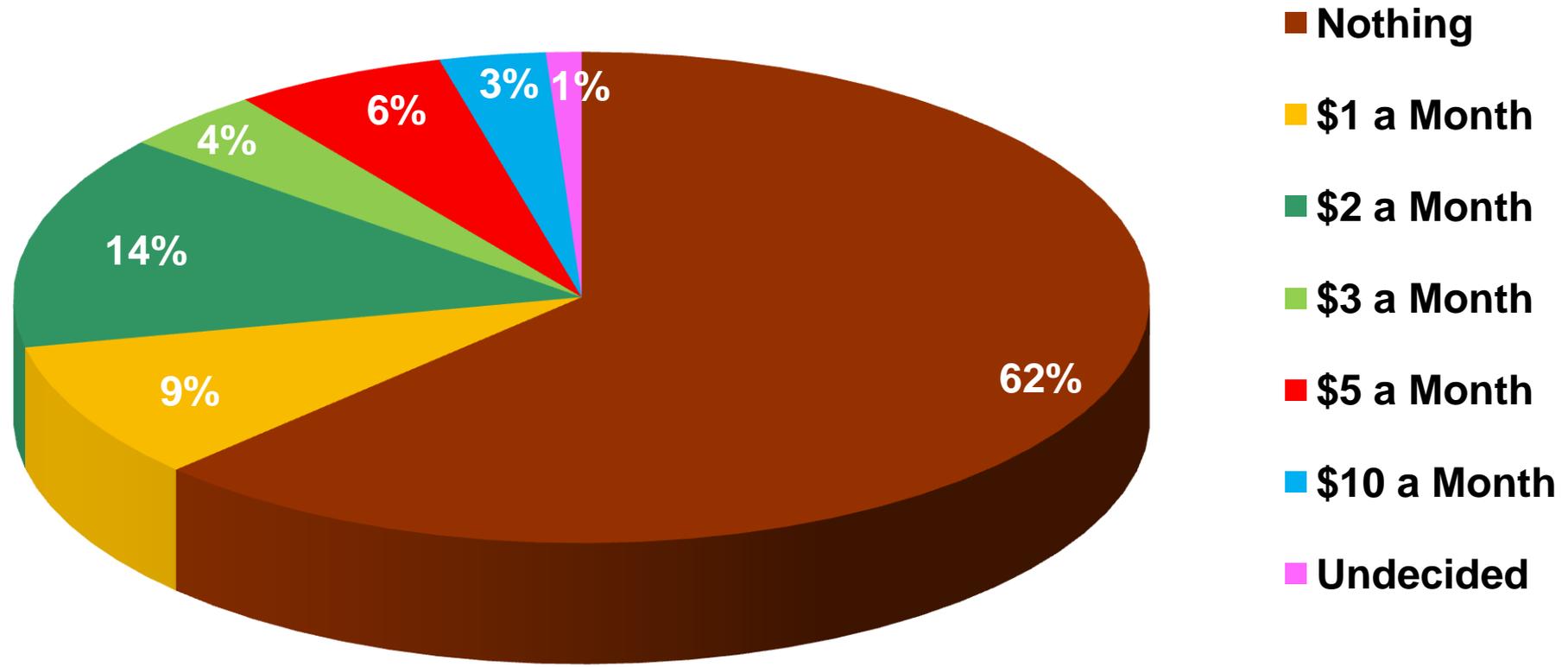
Favor Recycling for Rural?

Support for rural recycling is weakest among rural customers.

42% Strongly Favor; 27% Somewhat Favor; 9% Somewhat Oppose; 7% Strongly Oppose; 15% Undecided



Recycling Cost Willingness? (Rural Customers Only)

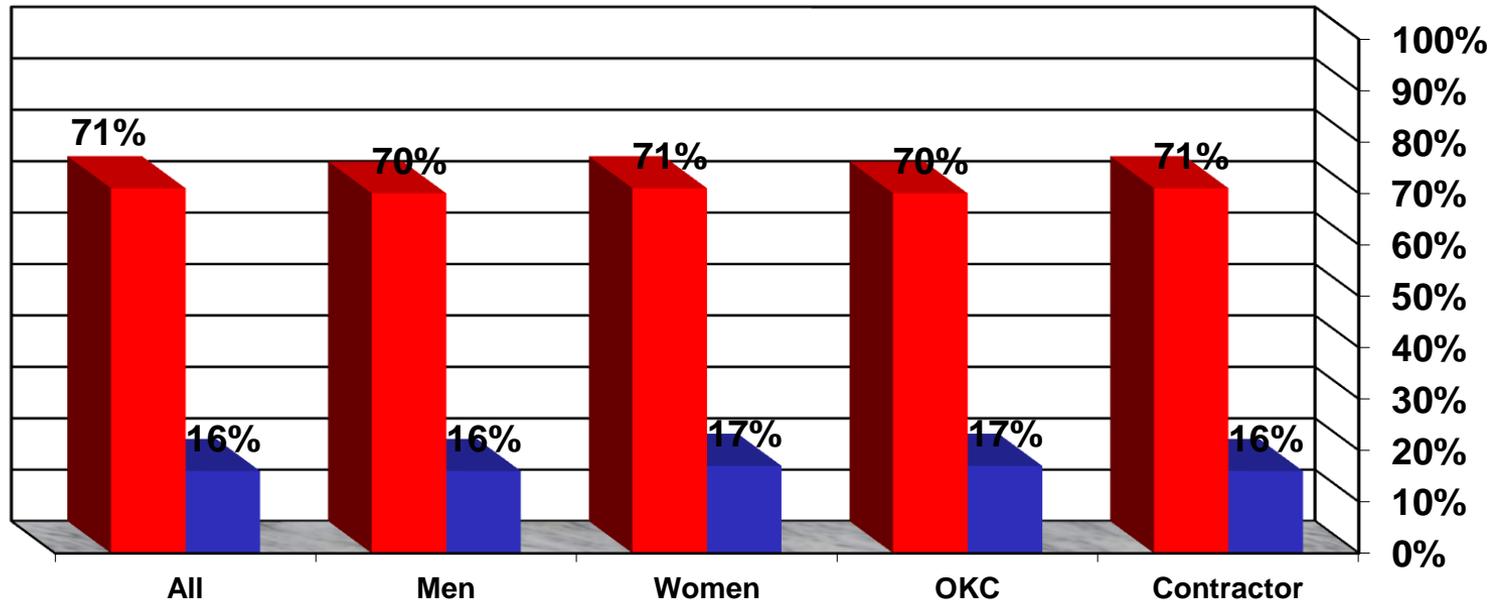


Given their lackluster support for a rural recycling program, it comes as no surprise that 62% of rural residents would not be willing to see their cost increase at all to provide this service. We do see a significant number, however, that would pay at least something. Fully 28% are willing to pay at least \$2 more a month. The cost, however, does become a factor and pushback should be expected.

Satisfied 18-Gallon Bins? (Urban Only)

42% Very Satisfied; 29% Somewhat Satisfied; 8% Somewhat Dissatisfied; 8% Very Dissatisfied; 13% Undecided

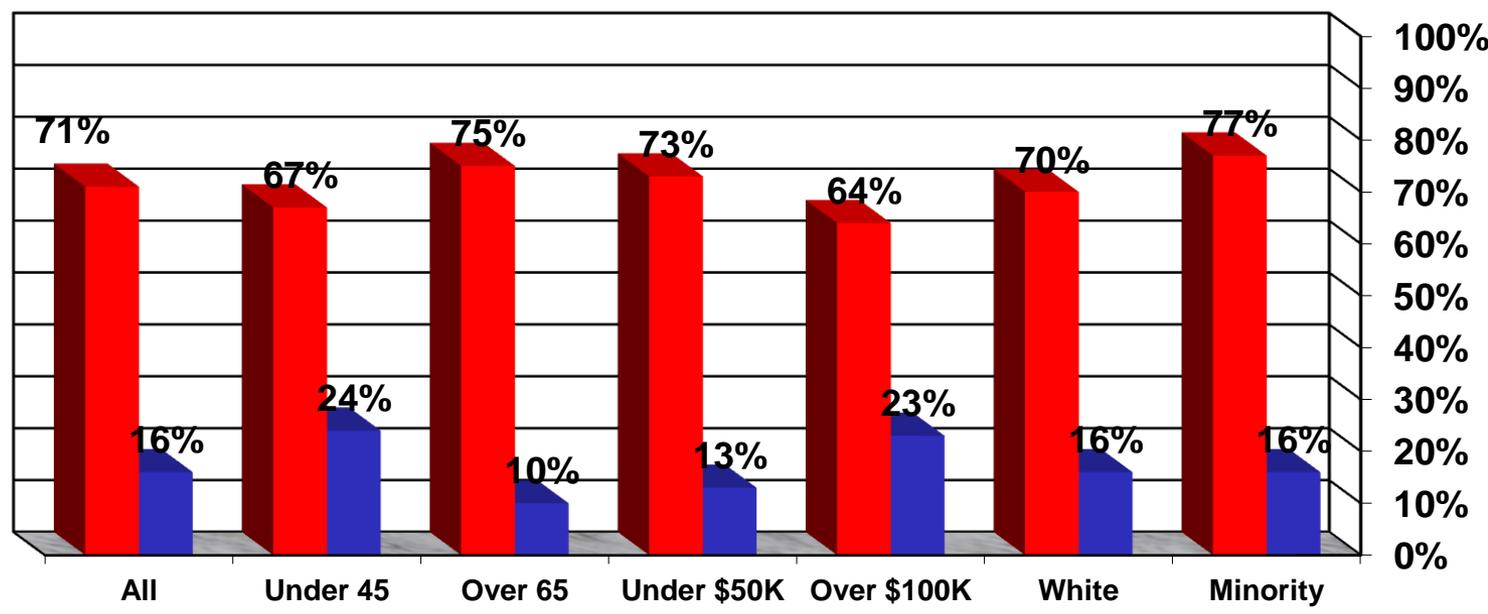
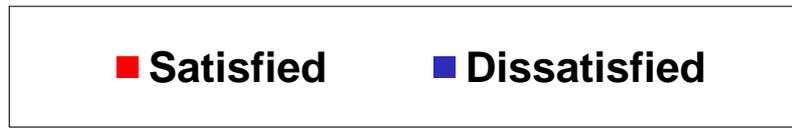
■ Satisfied ■ Dissatisfied



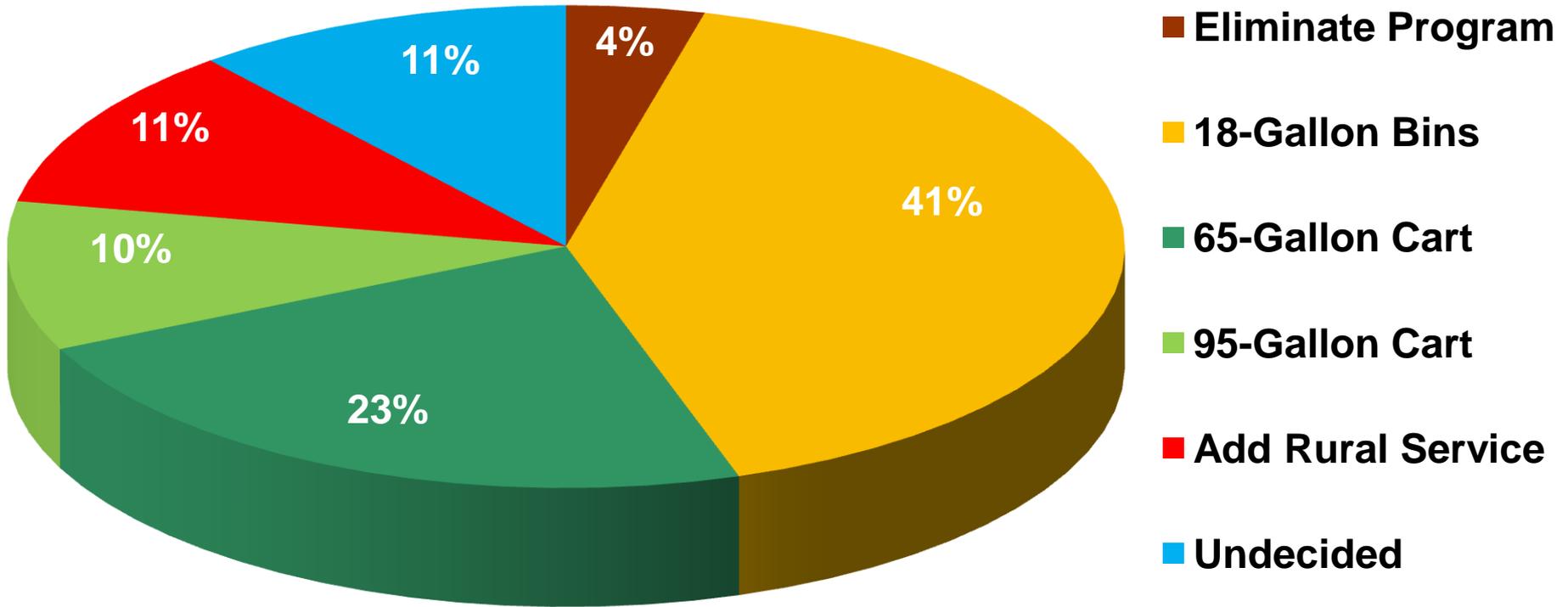
We see general satisfaction with the 18-gallon bins – but it is not as high as some of the other categories we have examined. Still, when looking at the ratio of the extremes, we see a better than 5-to-1 ratio. Clearly, there is not much clamoring for change. On this issue, contractor customers are almost identical to those getting service from the city.

Satisfied 18-Gallon Bins? (Urban Only)

While satisfaction is still high among most groups, we do see a few differences. Those under 45, more affluent and white residents are more likely to express some dissatisfaction.



Recycling Program Preference? (Urban Only)



We do see a third (33%) wanting to move to carts. This is higher among those who recycle regularly. Those who do not recycle tend to opt for keeping the current bins.

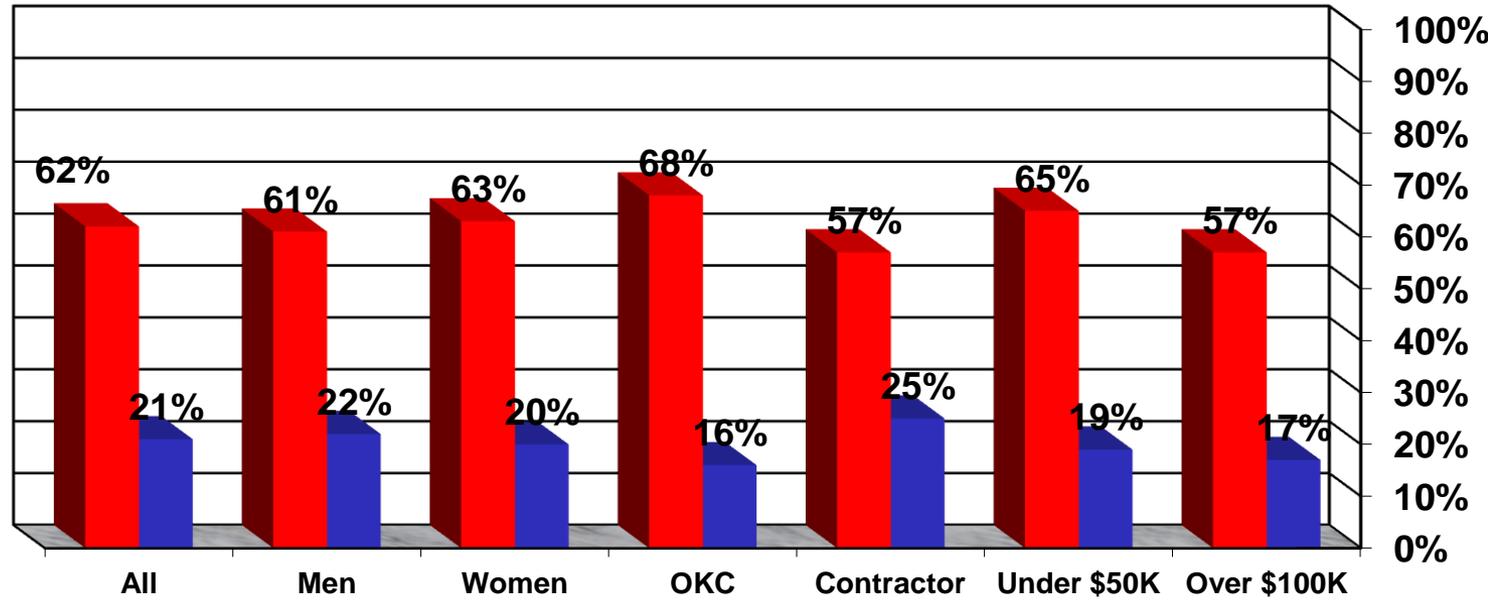
Favor Yard Waste in Carts? (Urban Only)

**37% Strongly Favor; 25% Somewhat Favor; 8% Somewhat Oppose;
13% Strongly Oppose; 17% Undecided**

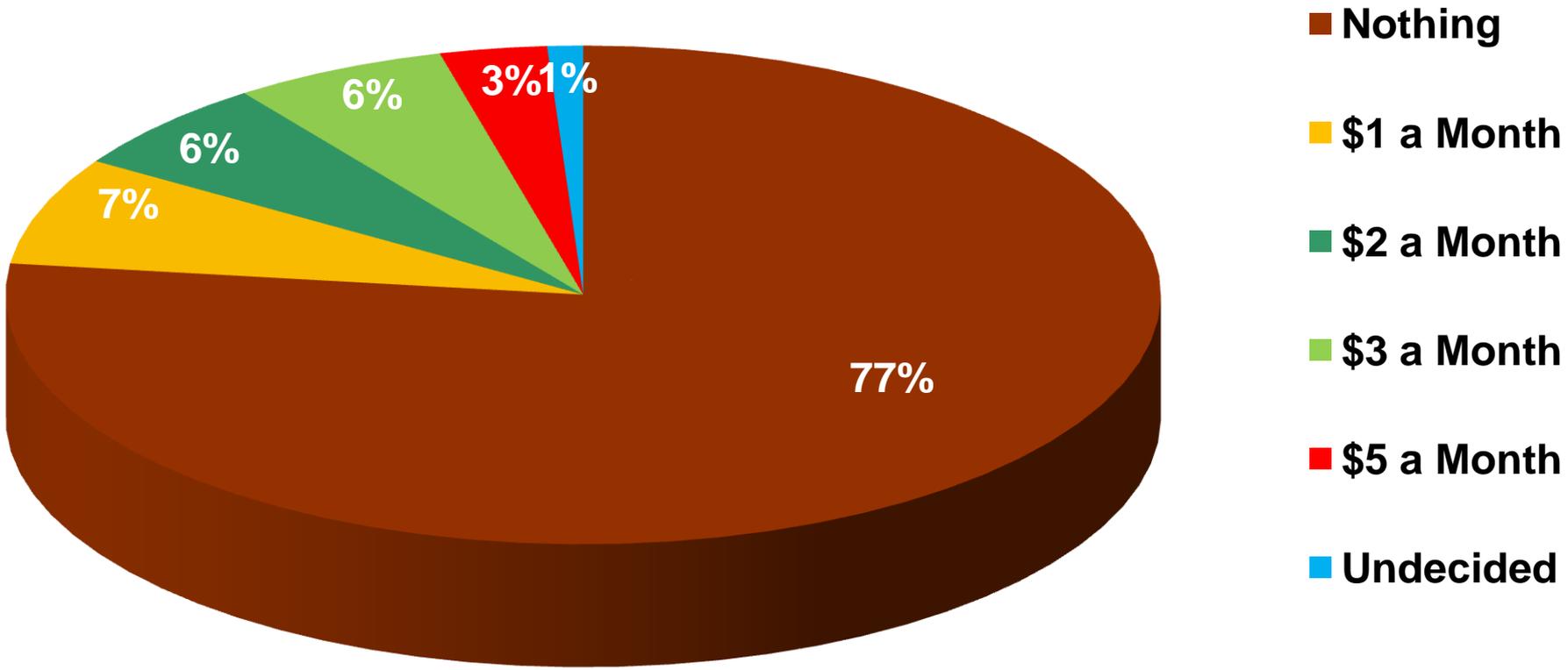
This is one change residents do embrace, by almost a three-to-one margin.

Note, this did say eliminating the bag pick-up could lower rates. This is not as popular among those on contractor routes.

We do see a slight income difference.



Yard Waste Cost Willingness? (Rural)

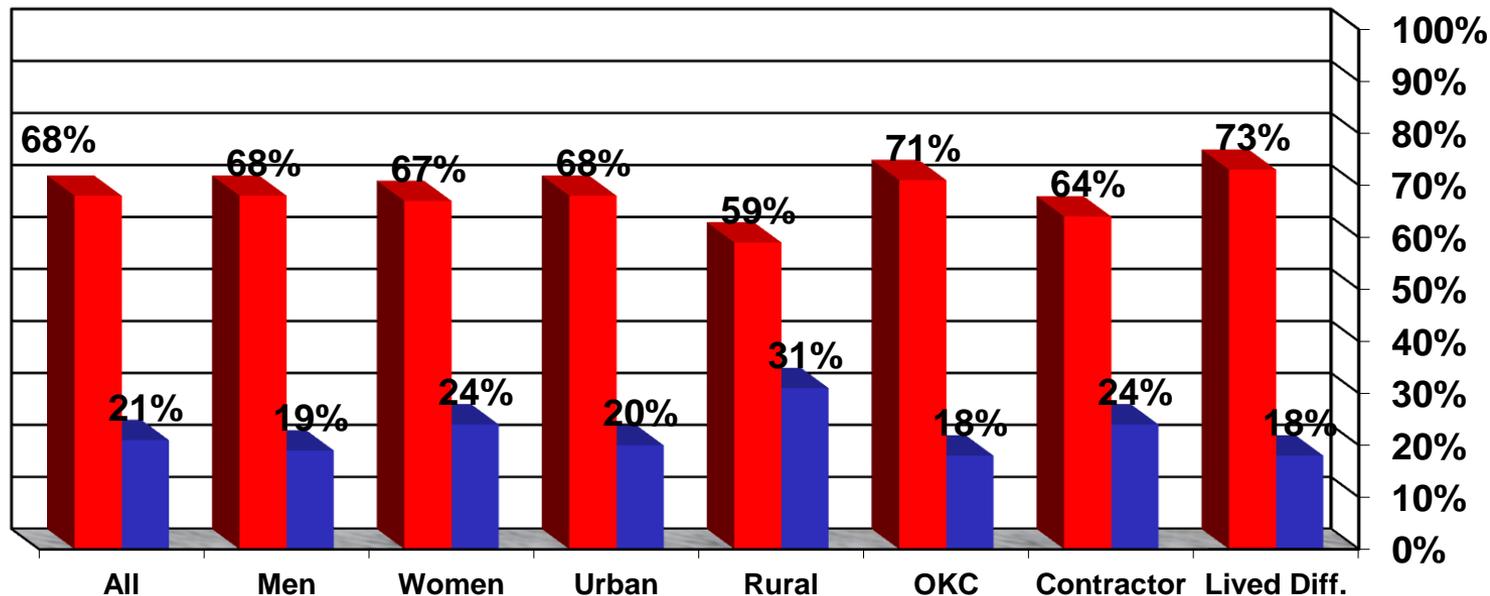


We see little appetite among rural customers to pay more for yard waste collection. Like with pay as you throw, it is not along income lines.

Favor Compost Collection?

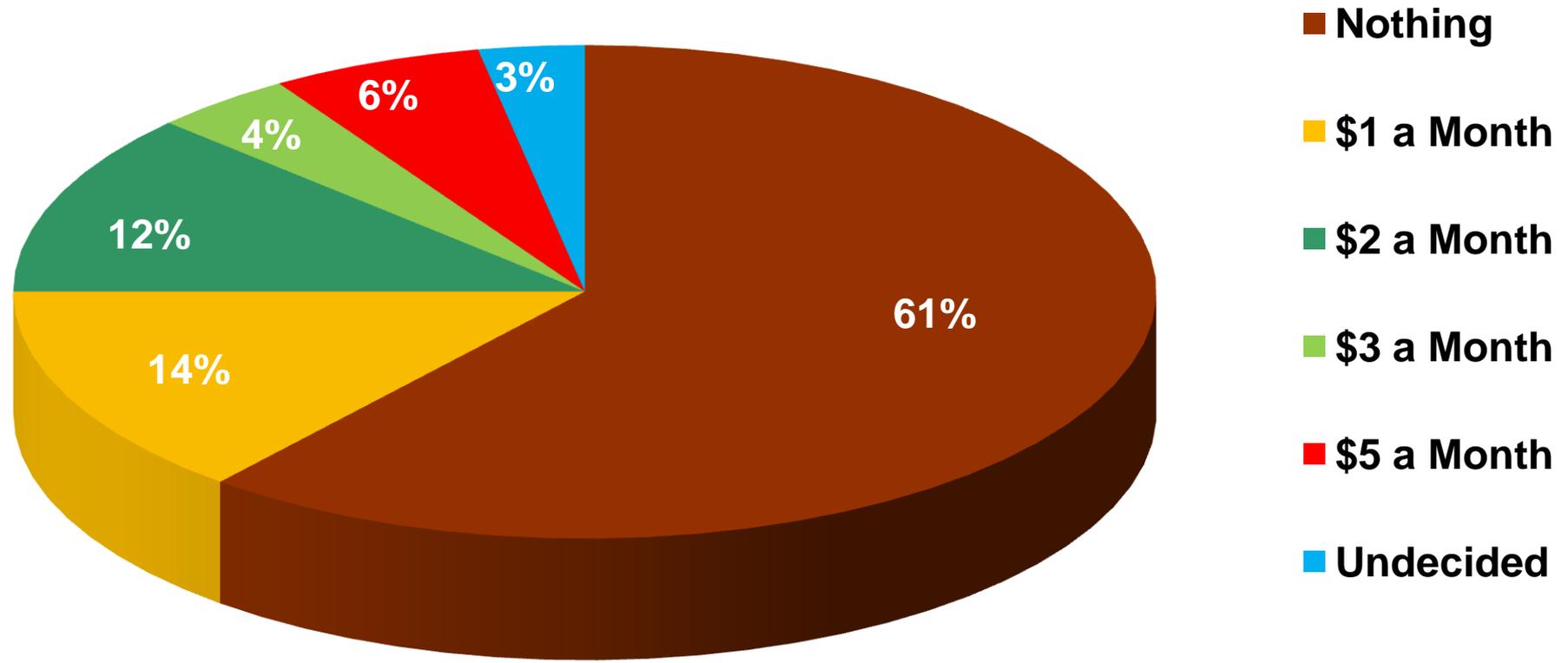
**39% Strongly Favor; 29% Somewhat Favor; 8% Somewhat Oppose;
13% Strongly Oppose; 11% Undecided**

■ Favor ■ Oppose



Two-thirds favor compost collection. It is not as desired in the rural areas – but even there, support hits 59%. Those who have lived in a different collection environment are the most supportive.

Compost Cost Willingness?



While still not overwhelming, we actually see more willingness for compost collection than for rural waste in the rural areas. However, among rural residents, opposition to paying more for compost collection is higher (74% nothing) than in the urban service area (59% nothing).

We have a majority of those under 45 willing to pay for this service, but the nothing increases to 75% among senior citizens.

Current Solid Waste Services

- Urban Areas
 - Household (Big Blue): 2 carts, 1/week, fee for extra carts
 - Bag collection, unlimited (both carts must be full before using bags)
 - Recycling (Little Blue): 18-gal bins, 1/week
 - Bulky waste: 1/month, max 4 CY (without additional charge)

Current Solid Waste Services

- Rural Areas
 - Household (Big Blue): 2 carts, 1/week, fee for extra carts
 - Bag pickup: not provided
 - Recycling: not provided
 - Bulky waste: 1/month, max 4 CY (without additional charge)

Request for Proposal

- Goals
 - Advertise: May 2015
 - Receive proposals: July 2015
 - Award contract: September 2015
 - Begin new contract: September 2016
- Discussions held with private collection companies for input

Request for Proposal

- Pricing to be requested:
 - Household Collection: 1x/week
 - Status quo
 - Status quo, bag limit, PAYT add'l bags
 - Containerize yard debris, PAYT for bags
 - Bulky waste: 1x/month
 - Recycling (with and without glass)
 - Status quo: bins, 1x/week
 - Single stream: 96-gal. carts, 1x/2 weeks

COMMENTS/QUESTIONS

FULL PUBLIC SURVEY SLIDES



A Survey of 600 Residents of Oklahoma City

Margin of error: +/- 4.9%

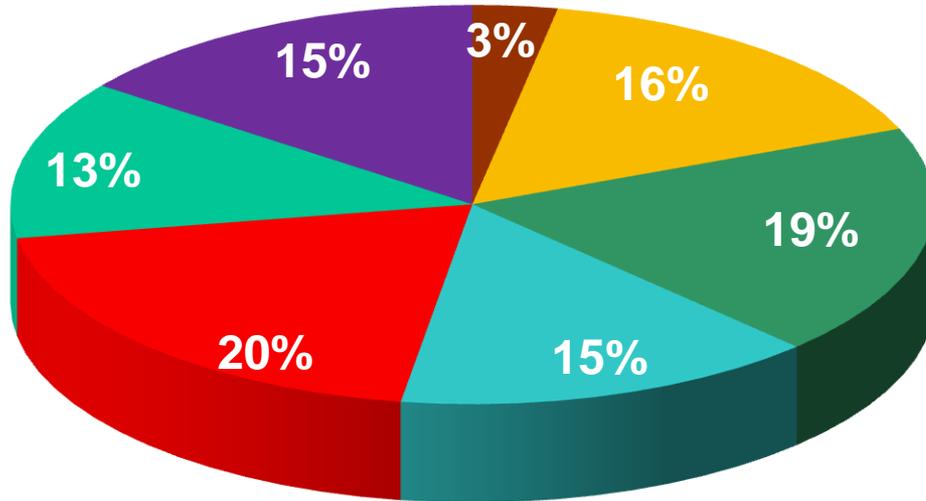
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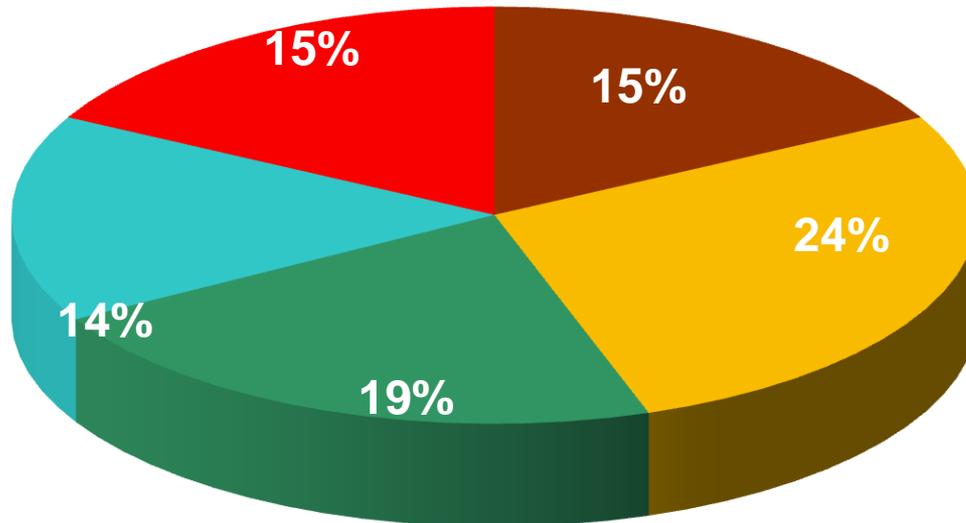
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Demographics

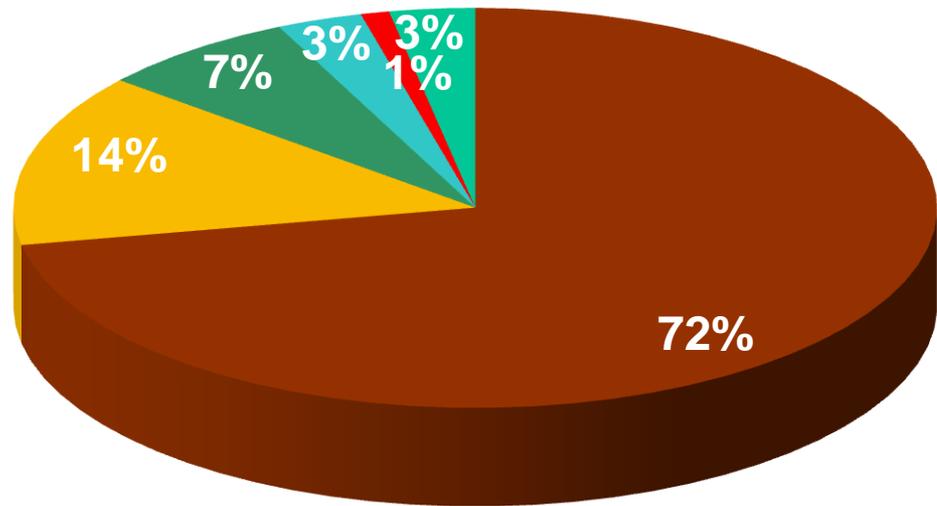


- ### Age
- 18-24
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 - 45 - 54
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 - 75 & Over

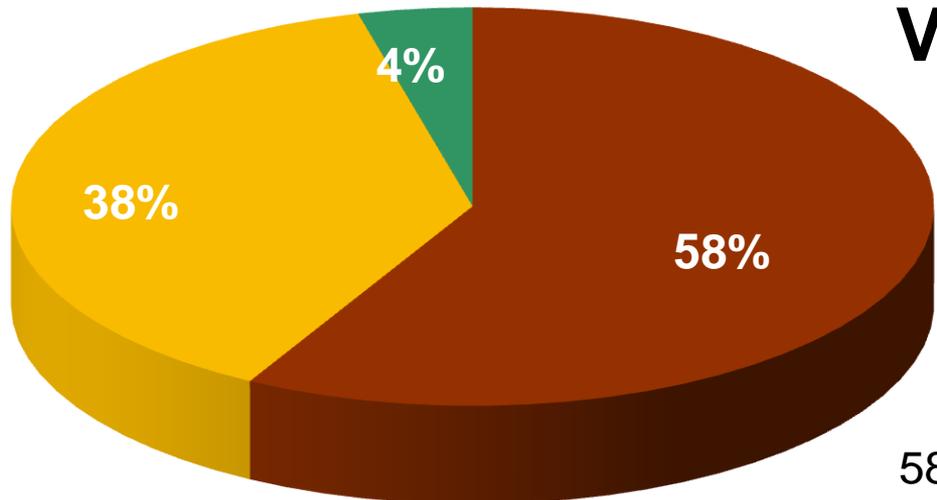


- ### Income
- Under \$25k
 - \$25-\$50k
 - \$50-\$75k
 - \$75-\$100k
 - Over \$100k

Demographics



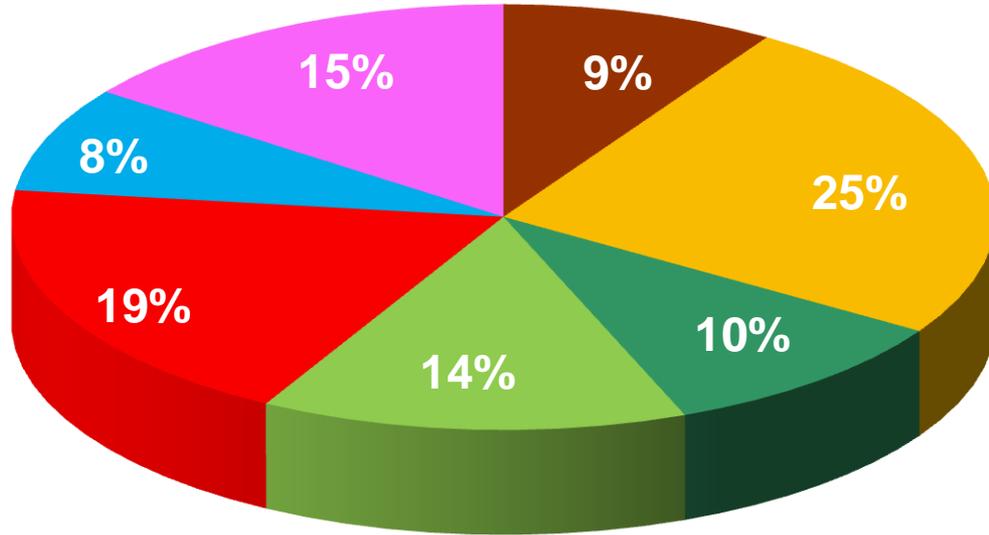
- ### Race
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 - African American
 - Hispanic
 - Native American
 - Asian
 - Ref.



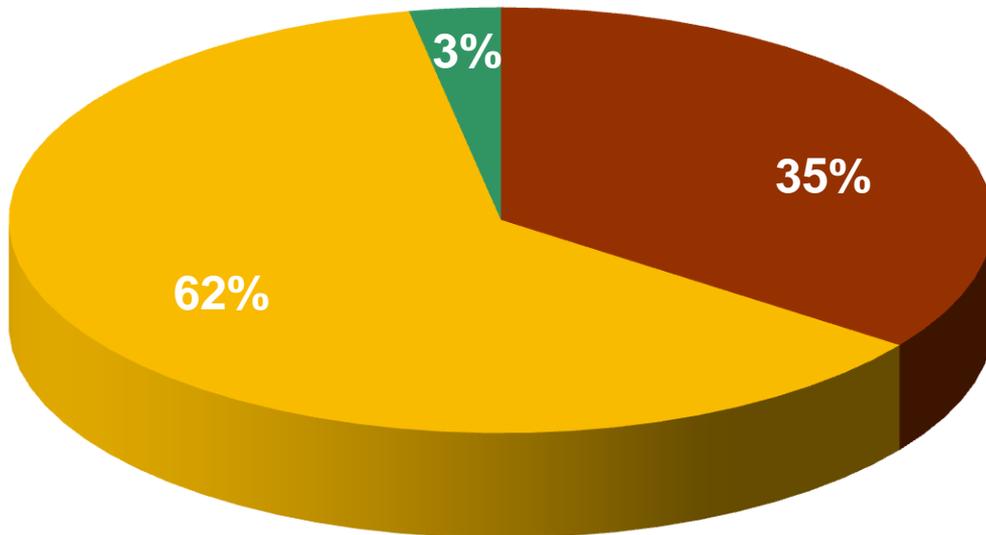
- ### Visited OKC.gov
- Yes
 - No
 - Can't Remember

58% visitation is the exact same percentage we had on this question in May 2014.

Connection to OKC



- Less than 1 Year
- 1-3 Years
- 4-5 Years
- 6-10 Years
- 10-20 Years
- >20 Years
- Uncertain

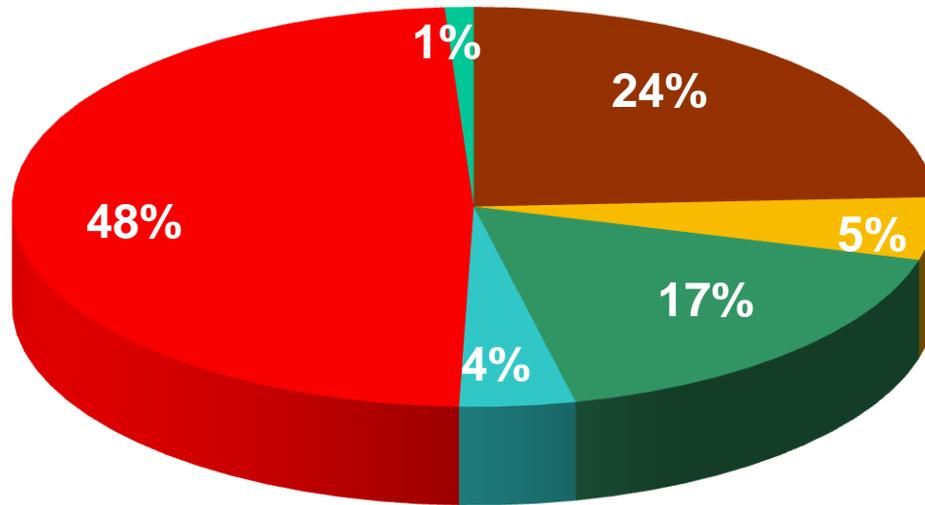


Lived Where Trash was Different?

- Yes
- No
- Uncertain

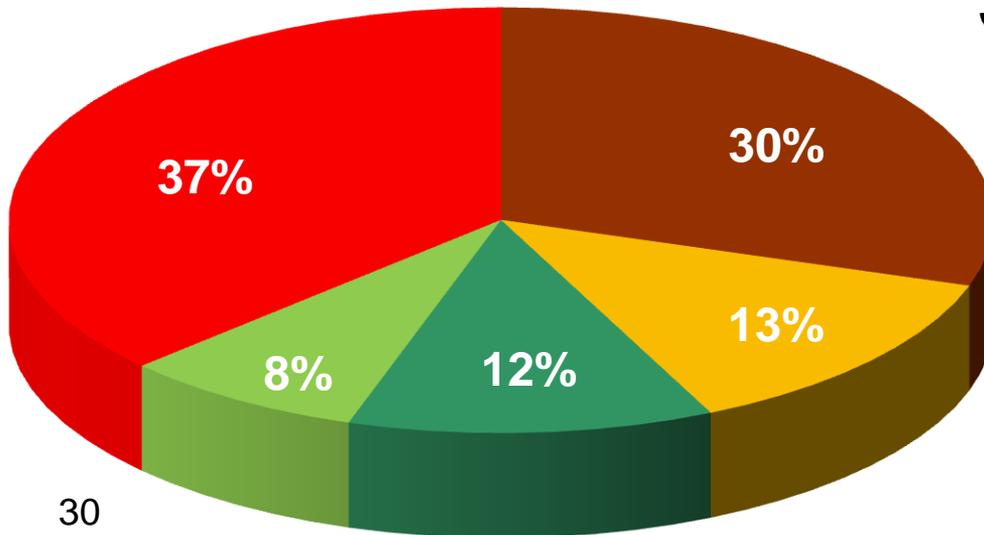
Media Habits

Daily Oklahoman



- Every Day
- Most Days
- Twice a Week
- Couple Times a Month
- Hardly Ever
- Uncertain

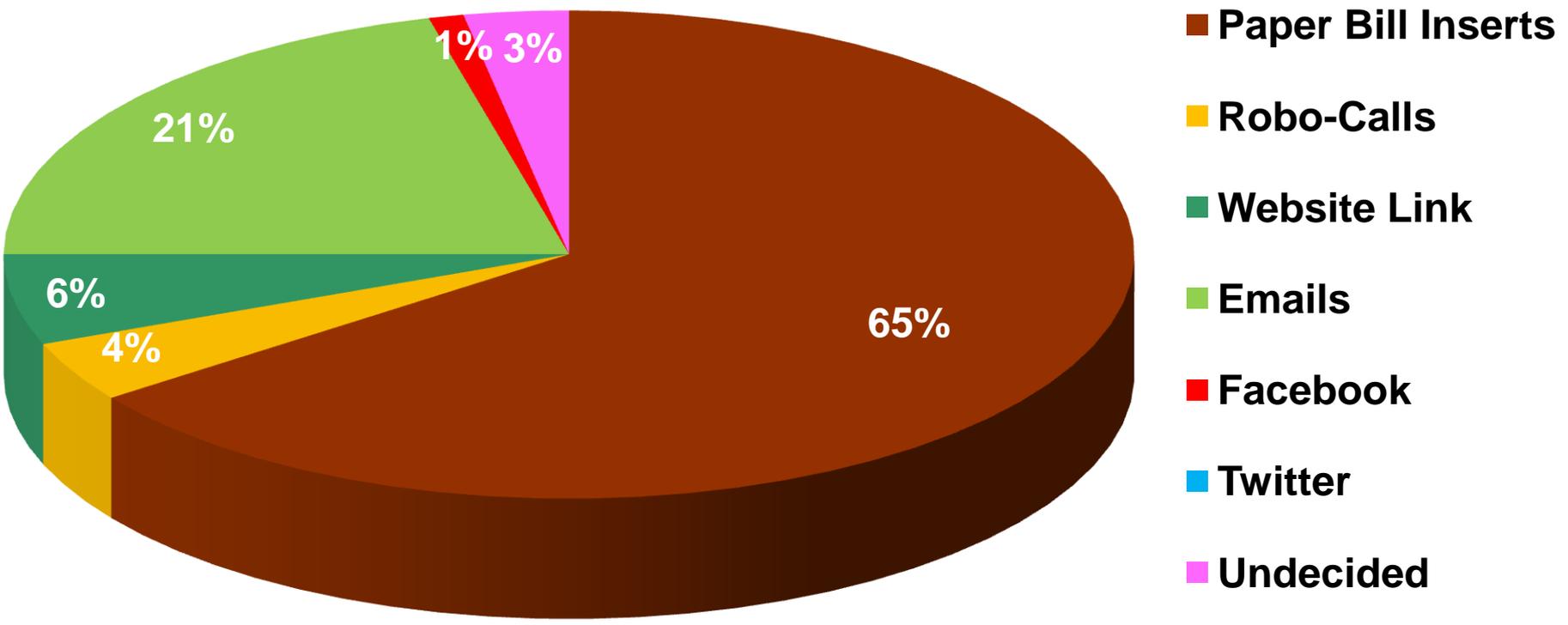
Social Media



- >Once a Day
- Once a Day
- Once a Week
- Less Often
- Never

We now have a higher percentage of residents engaged in social media than we have that are reading The Oklahoman.

Preferred Info Delivery?

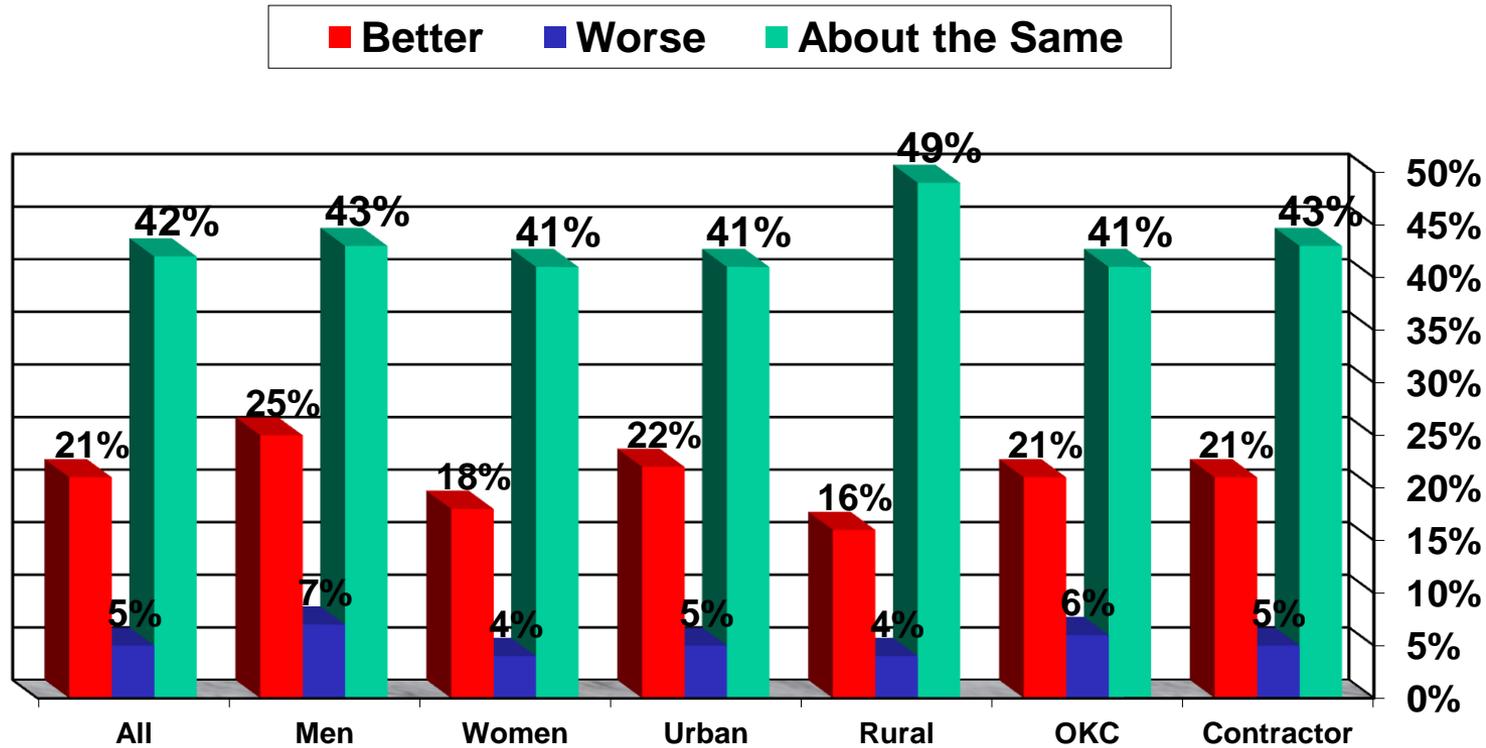


Despite the high use of social media, neither Facebook or Twitter resonate with many as a way to stay informed about city issues. Confirming what we have seen in the past, paper bill inserts are still the preferred delivery method. We are seeing a significant number of residents who would like to be contacted by email.

OKC Service Comparison?

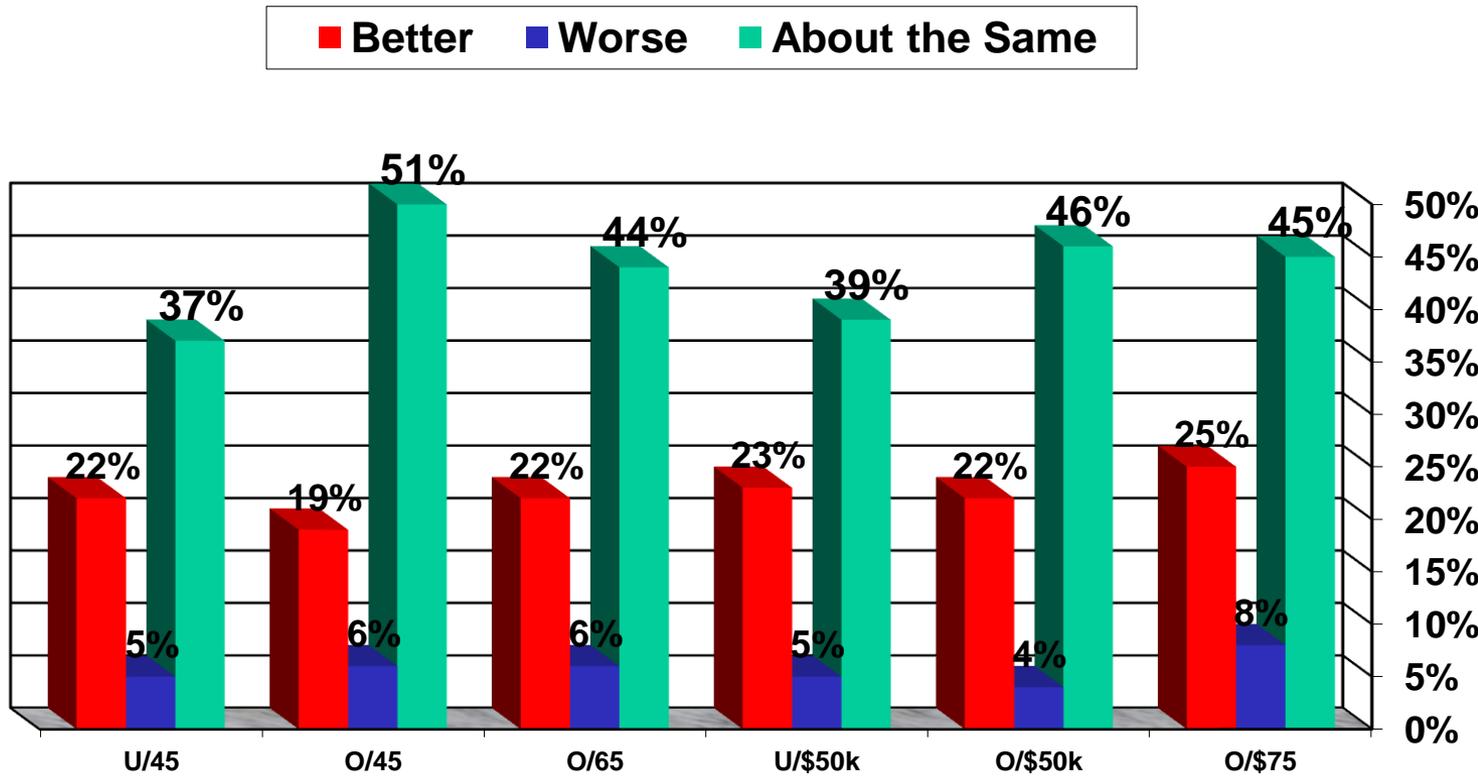
21% Better; 5% Worse; 42% About the Same; 32% Undecided

With a four-to-one positive to negative ratio, these are okay numbers. A reasonable goal is six-to-one. We see greater satisfaction with “urban” customers than “rural” and no difference between those served by the City and those served by a contractor.



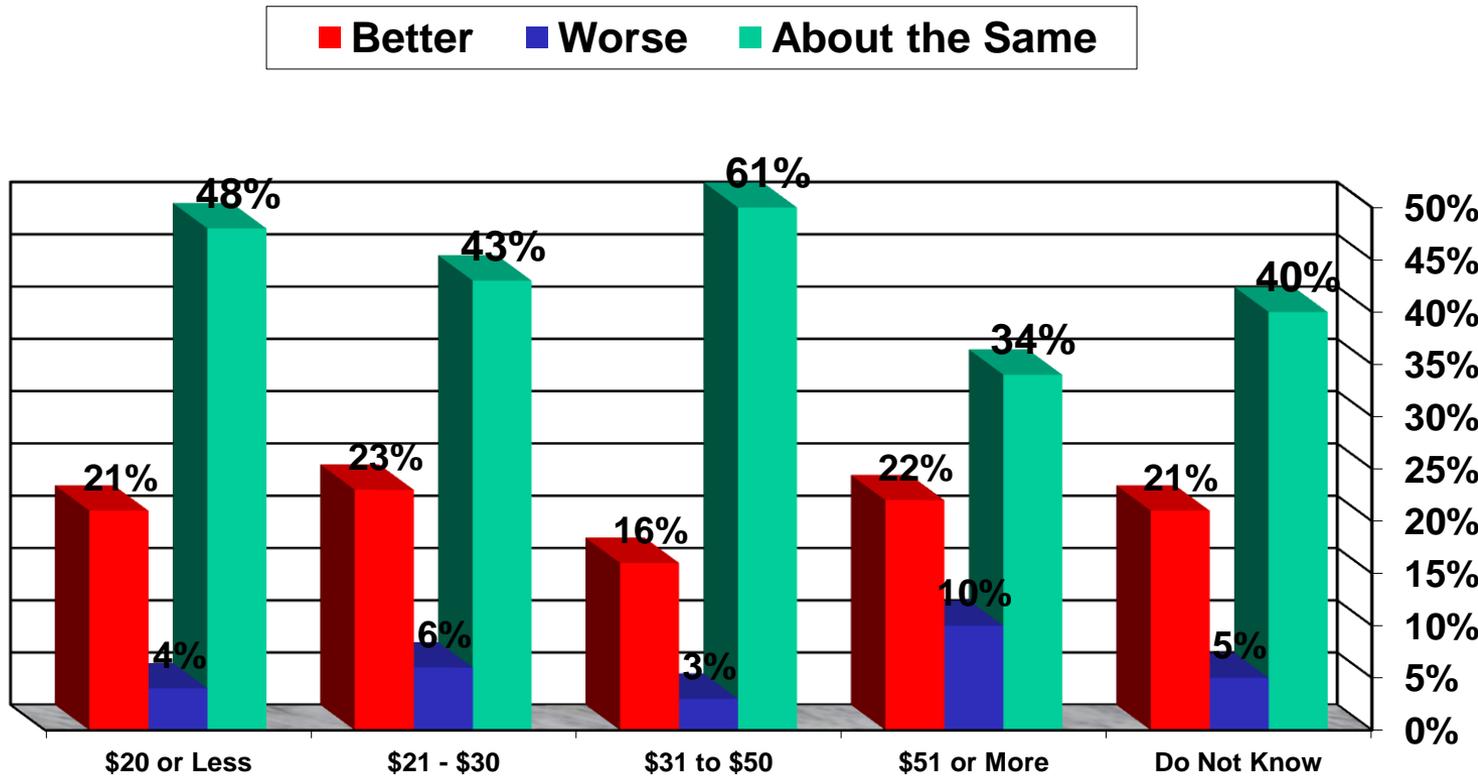
OKC Service Comparison?

Neither age nor income appears to have much bearing on opinion – only a slight uptick in “worse” among those in households with an annual income exceeding \$75,000.



OKC Service Comparison? By How Much Thought Paid

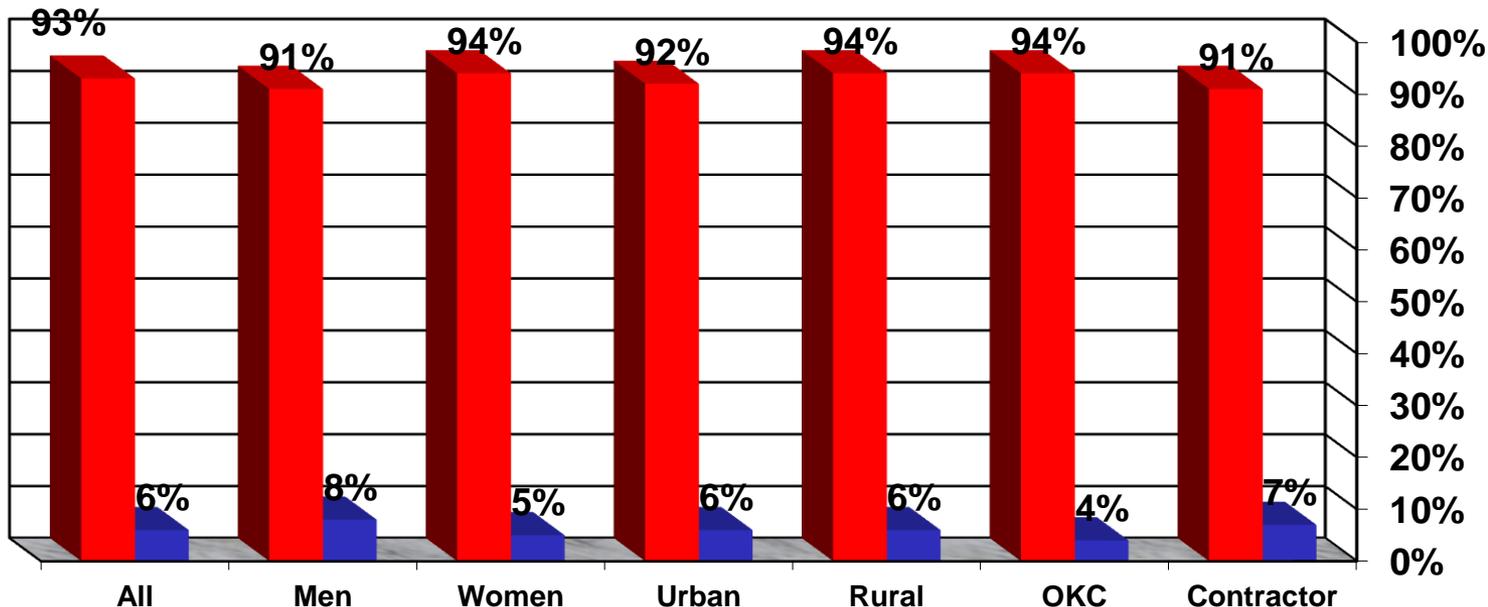
We do see dissatisfaction increase a bit among those who think they pay more for service (though it is only 8% in the \$51+ category).



Trash Service Satisfaction

61% Very Satisfied; 32% Somewhat Satisfied; 5% Somewhat Dissatisfied; 1% Very Dissatisfied; 1% Undecided

■ Satisfied ■ Dissatisfied

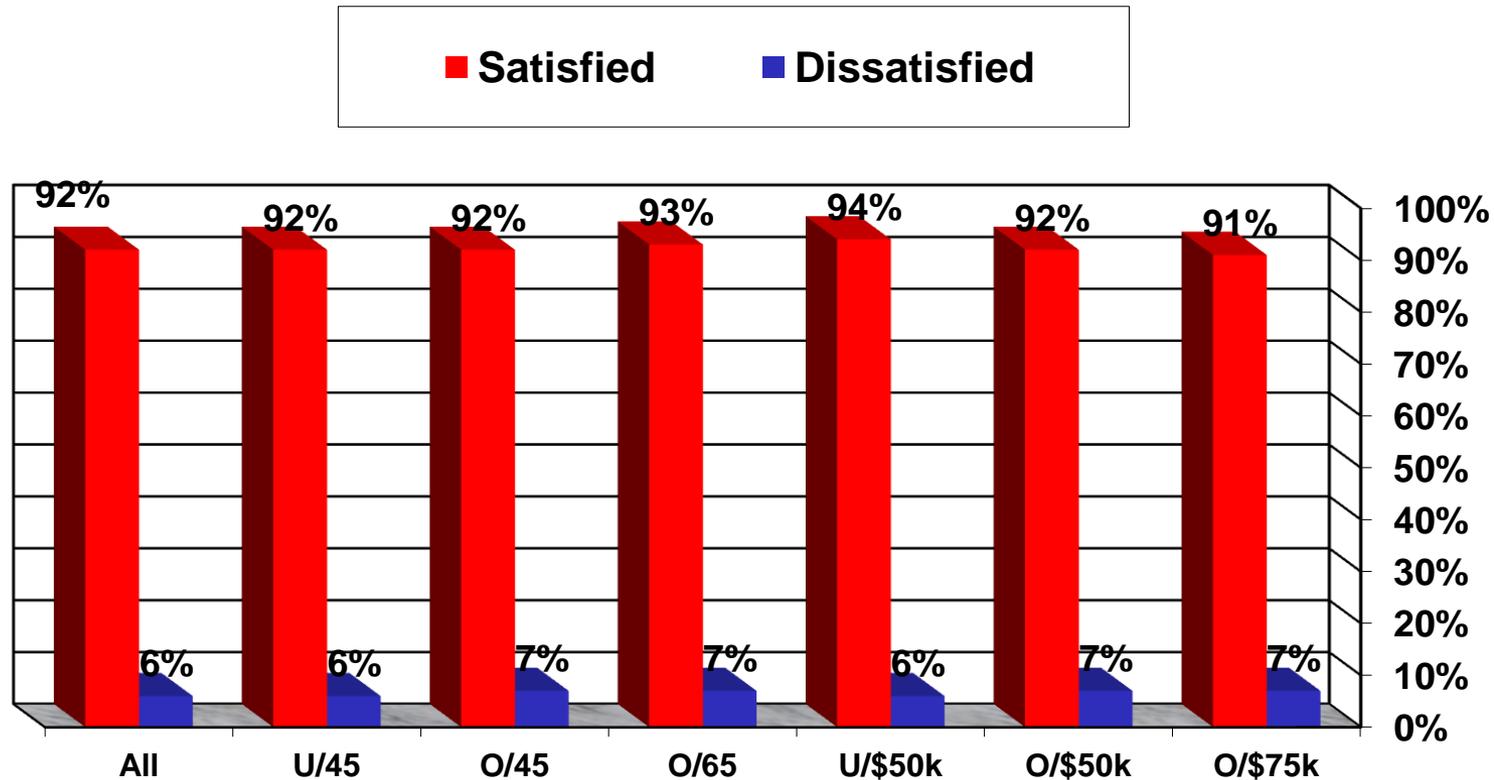


More than 90% satisfaction is a very high number – perhaps most impressive is that 61% are “very satisfied.” Here, we do see a slight difference between those served by the City and those served by a contractor.

While the urban and rural look the same, there is a difference in that 62% of urban customers say they are “very” satisfied and only 51% of rural customers say likewise.

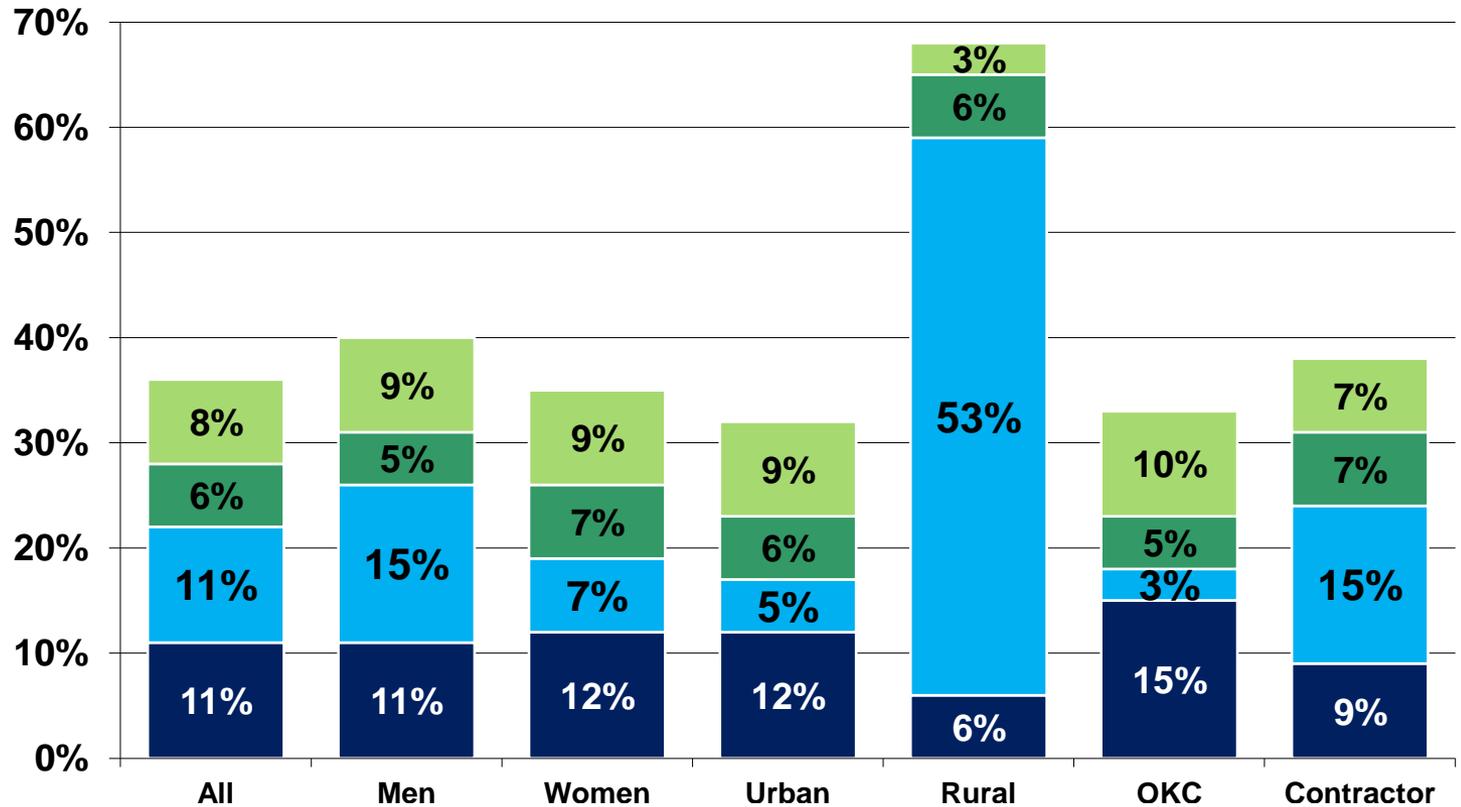
Trash Service Satisfaction

We see no significant differences along either age or income lines.



Trash Bill

11% \$20 or Less; 11% \$21-\$30; 6% \$31-\$50; 8% \$51 or More;
1% Too Much; 63% Do Not Know

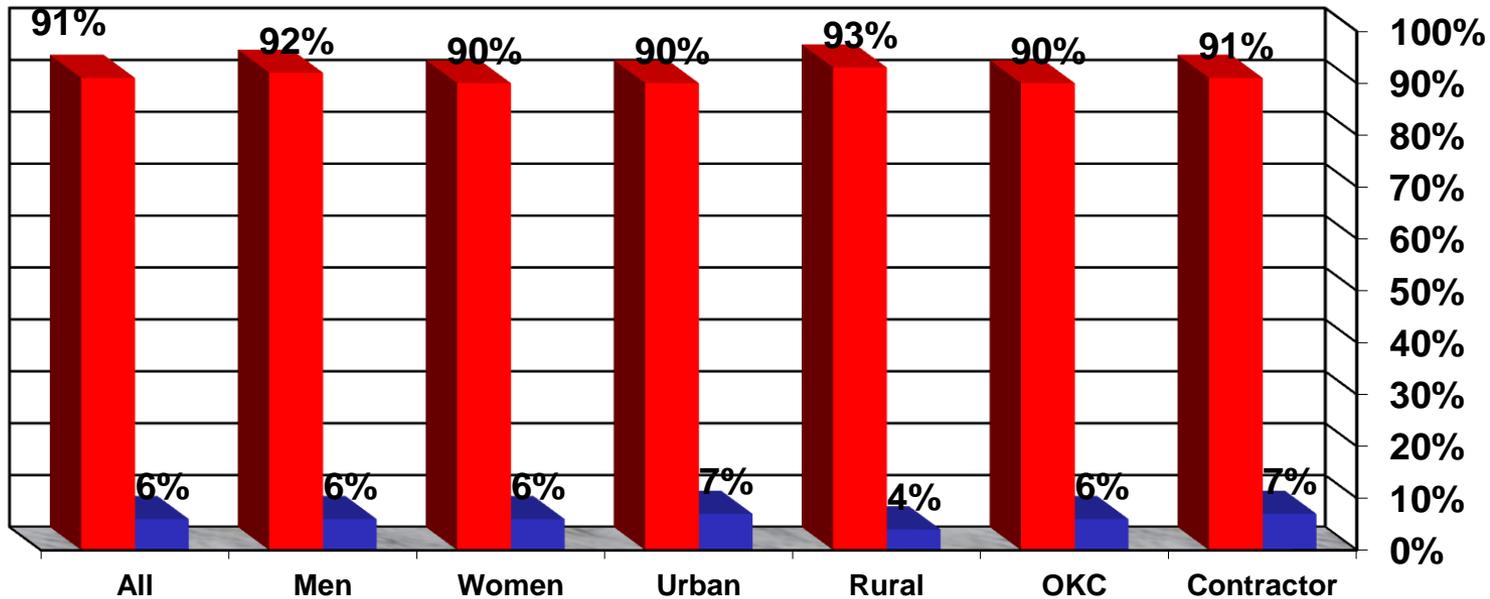
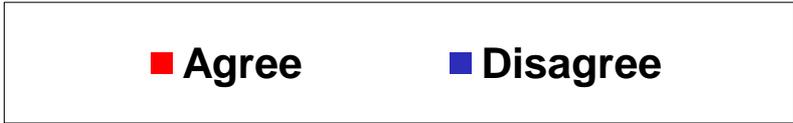


Most residents readily admit they do not know what they pay for trash service. The exception is among the rural customers where awareness is much higher.

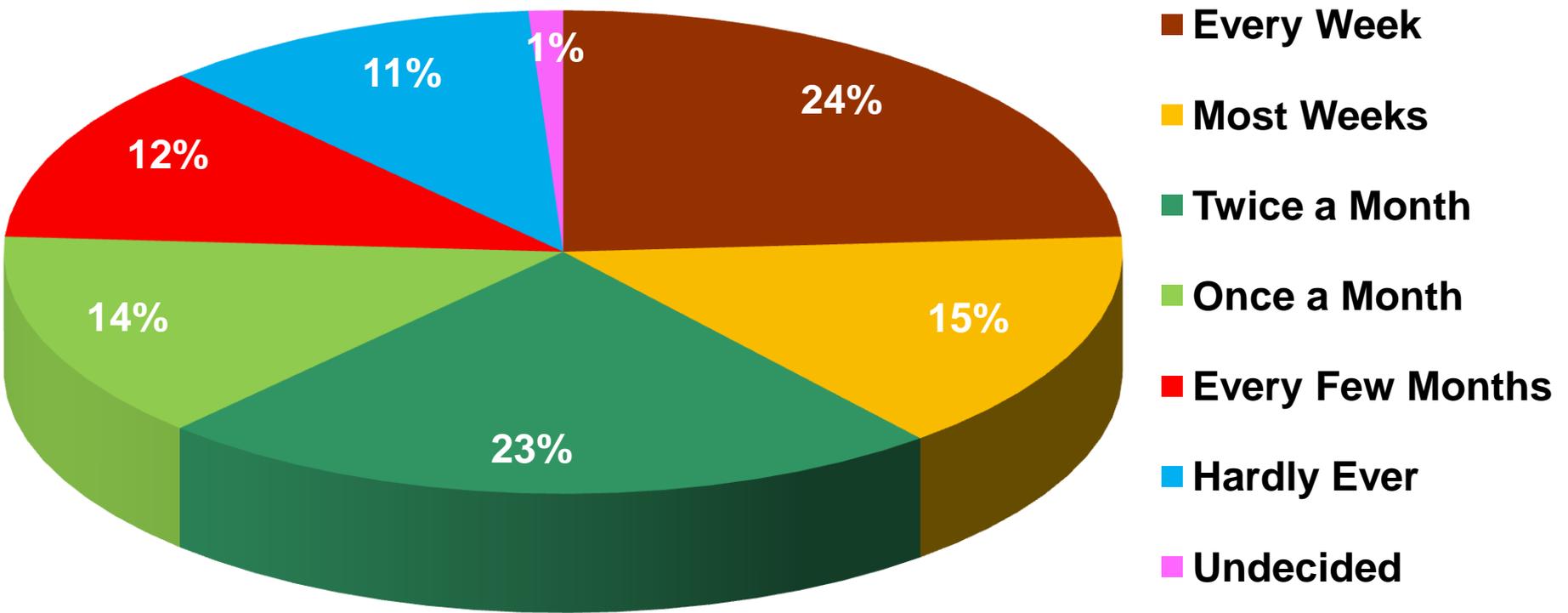
Pleased Blue Carts

The Big Blue carts have been almost universally accepted.

63% Strongly Agree; 28% Somewhat Agree; 3% Somewhat Disagree; 1% Strongly Disagree; 3% Undecided

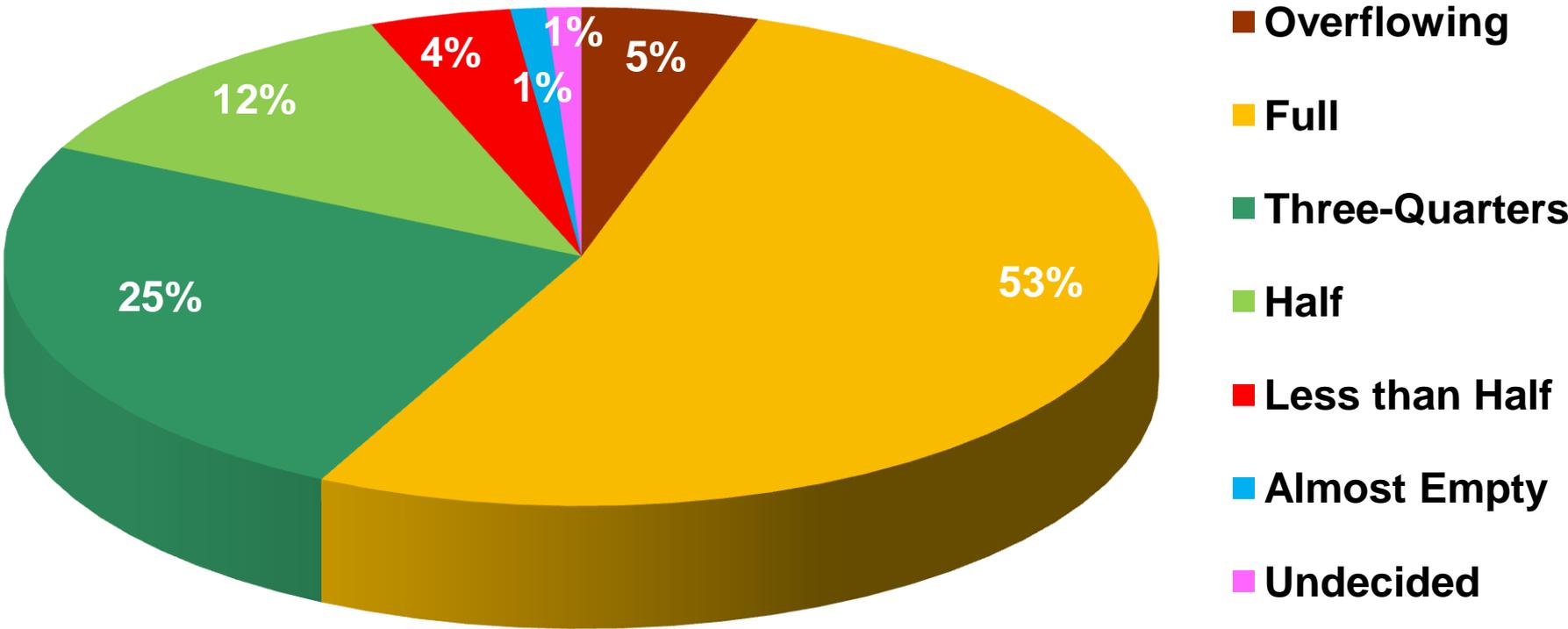


How Often are Multi-Carts Used for Pick-Up?



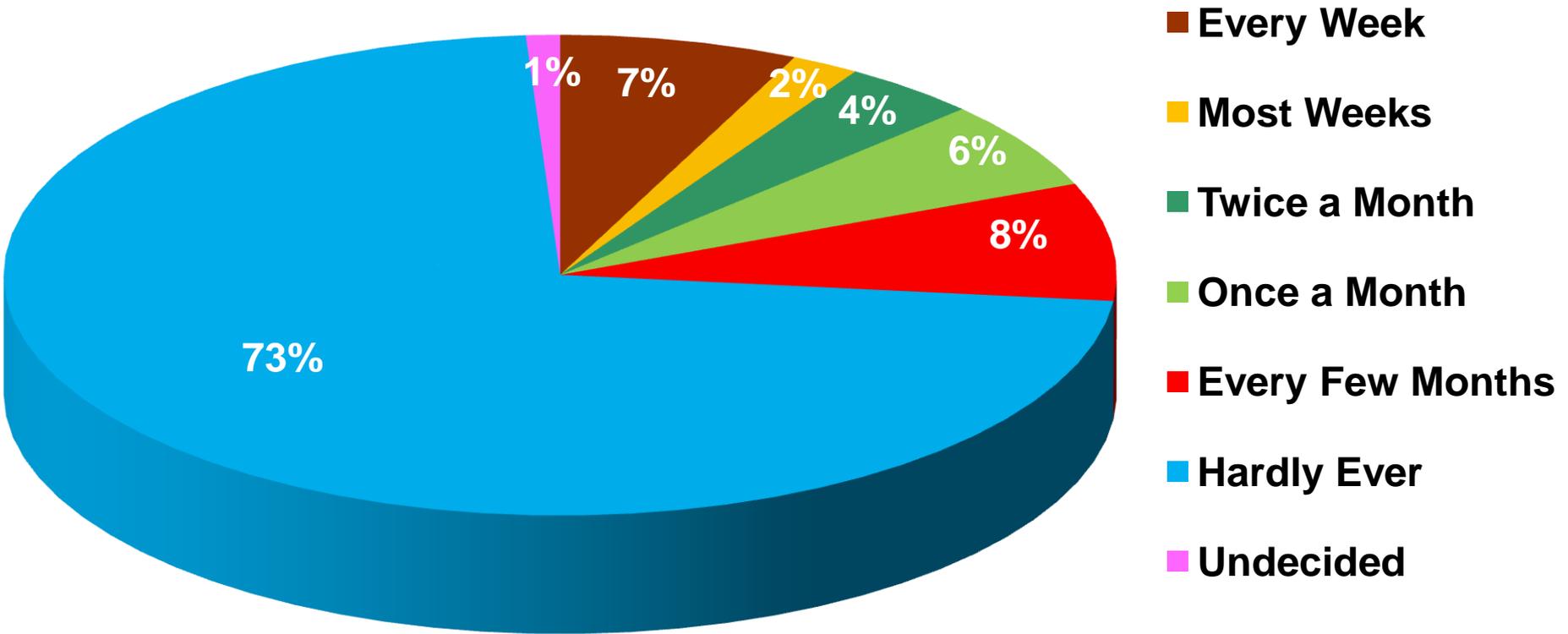
Among those with multiple carts, more than three quarters say they use them at least monthly. A fourth use them every week.

How Full Are Carts?



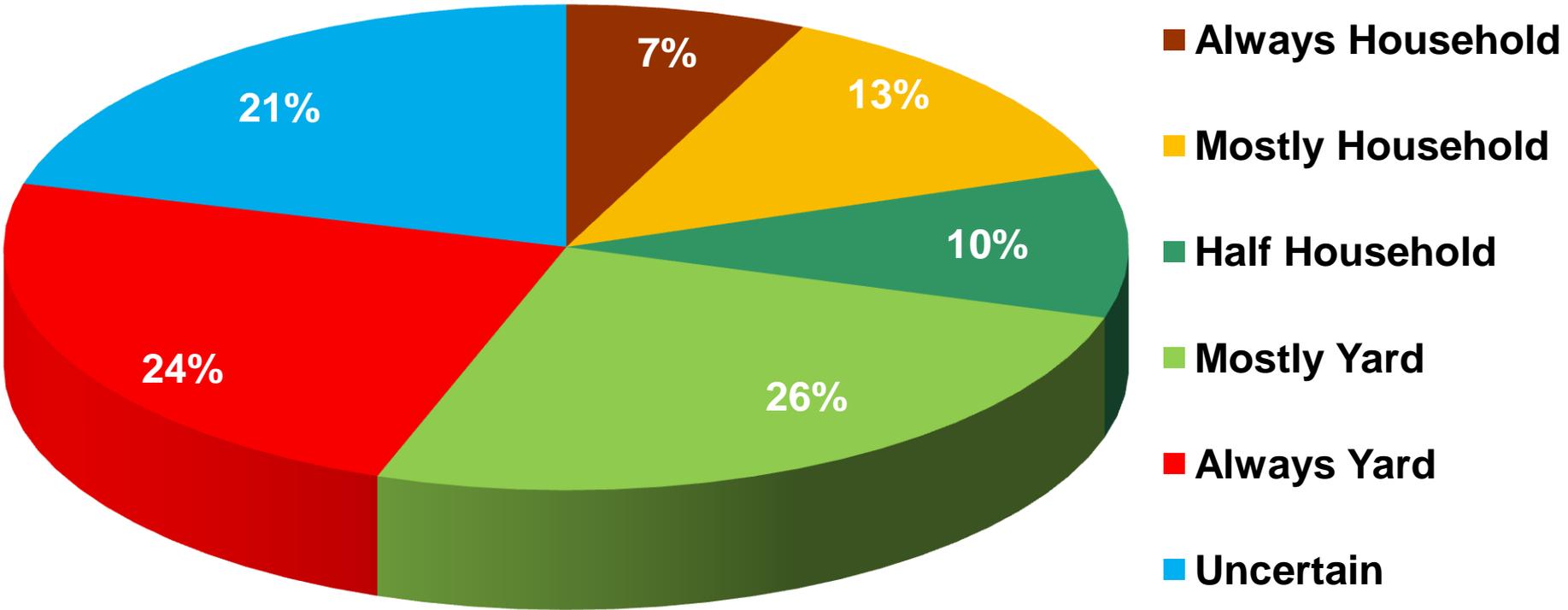
The carts seem to be utilized efficiently. Only 5% say their carts are generally overflowing.

How Often Use Bag Disposal?



Relatively few residents use bags on a regular basis.

Bag Contents?

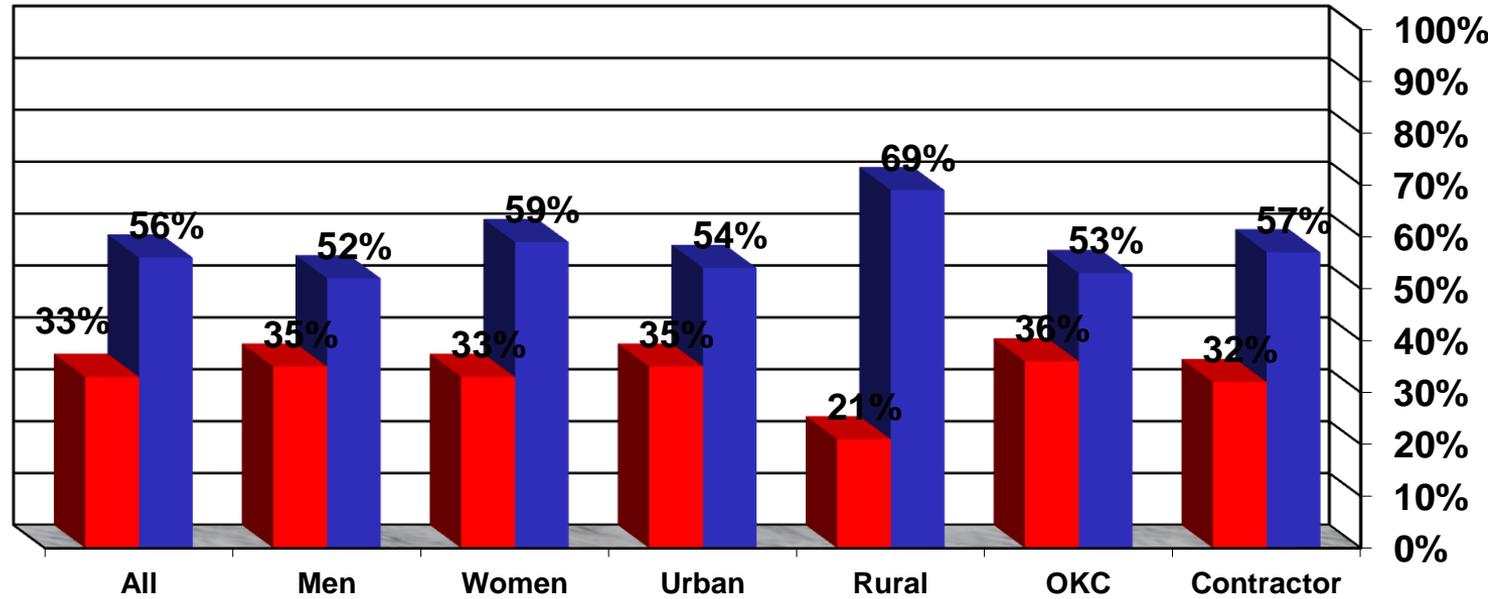


Those who do use bags tend to use it for yard waste. There is a strong relationship between those who use bags weekly and that always use it for household purposes. Clearly, this 7% should have another cart and pay for that service.

Pay as You Throw?

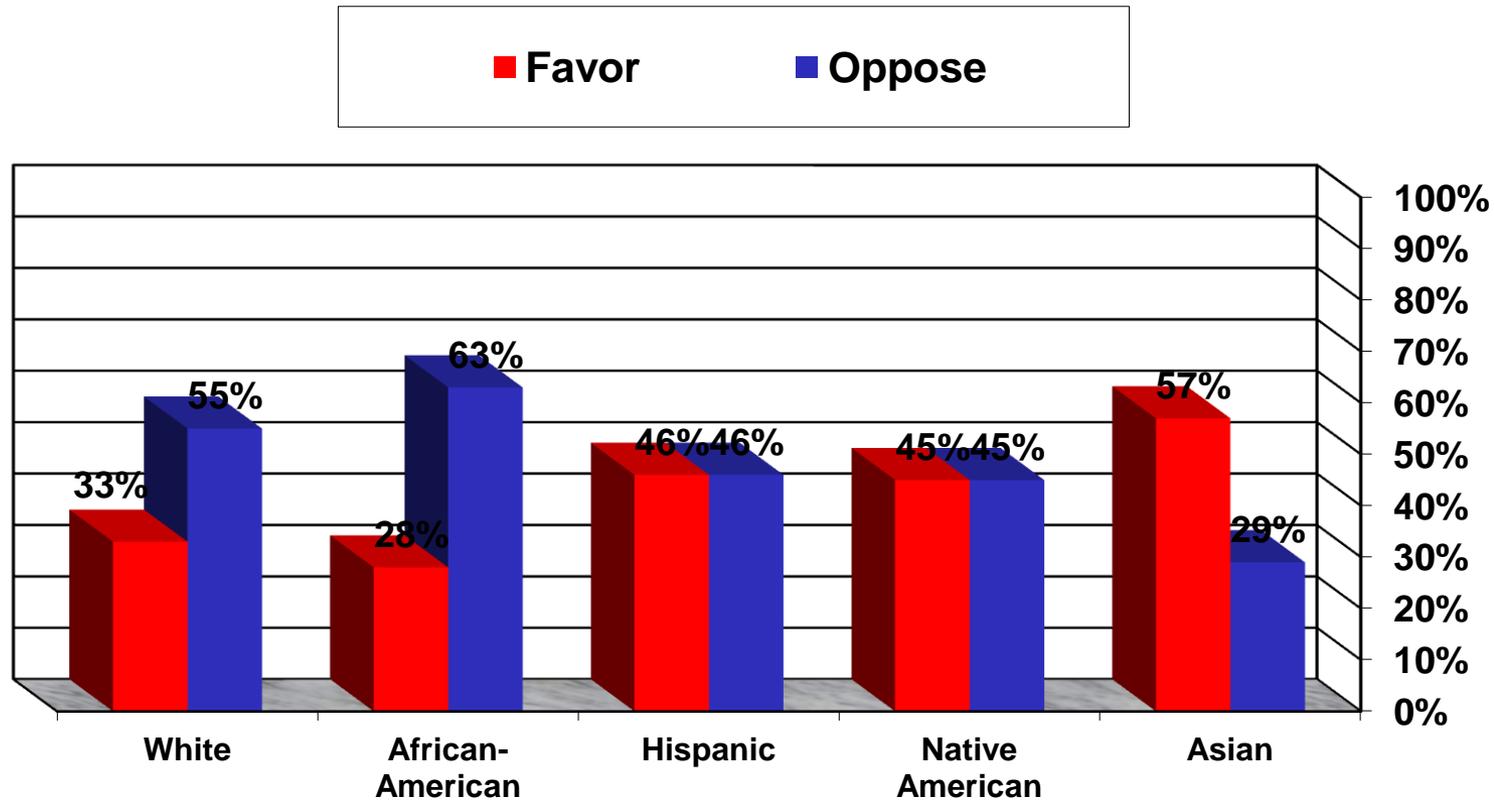
Initial reaction to “pay as you throw” is not positive. We see a higher negative among rural customers than urban ones.

16% Strongly Favor; 17% Somewhat Favor; 15% Somewhat Oppose; 41% Strongly Oppose; 11% Undecided



Pay as You Throw?

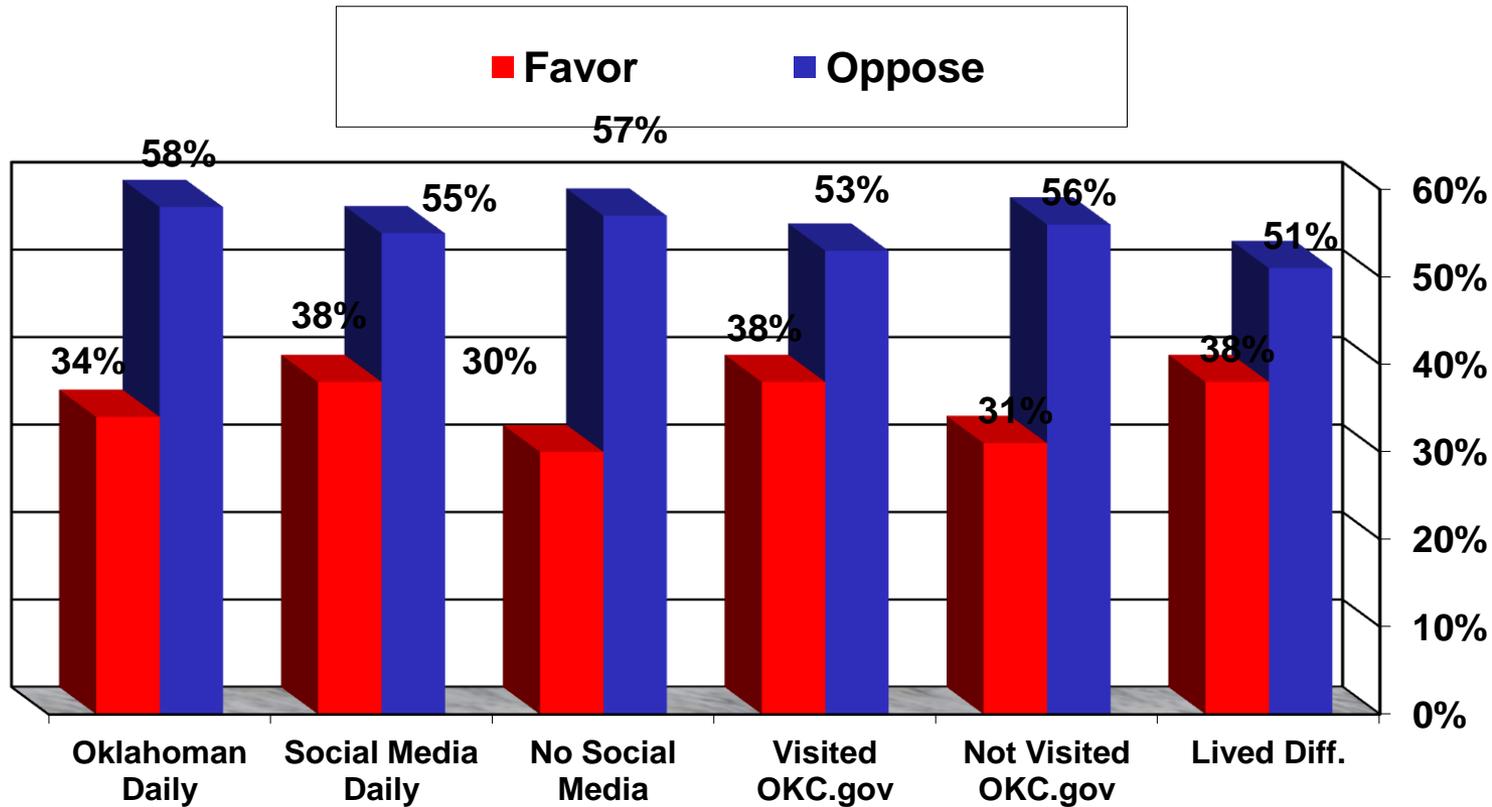
We see the greatest reluctance in the African-American and white communities.



Pay as You Throw?

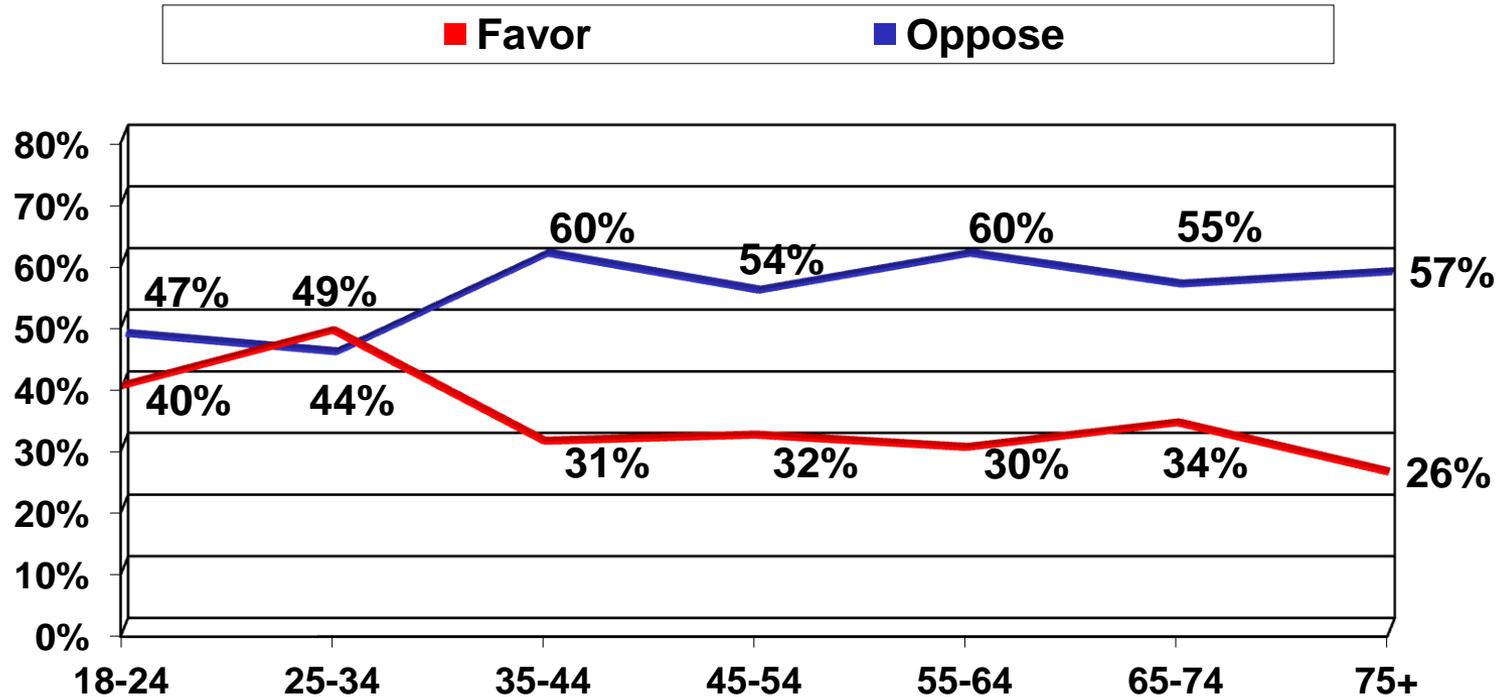
Those more active online are a little more supportive than are their counterparts.

Those who have lived somewhere trash is collected in a different manner are slightly more in favor.



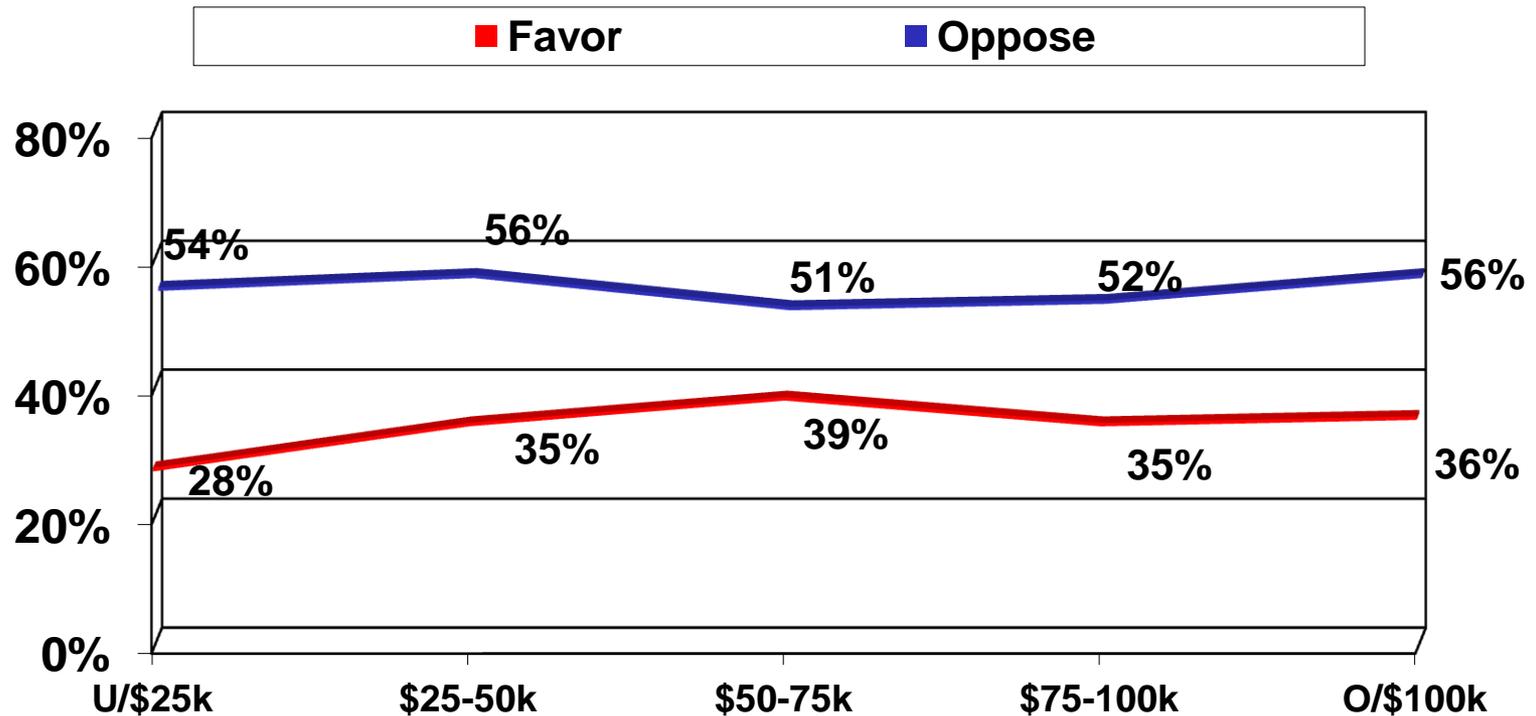
Pay as You Throw? By Age

Age is clearly a defining issue. Those under 45 are much more amenable to change than are those older.



Pay as You Throw? By Income

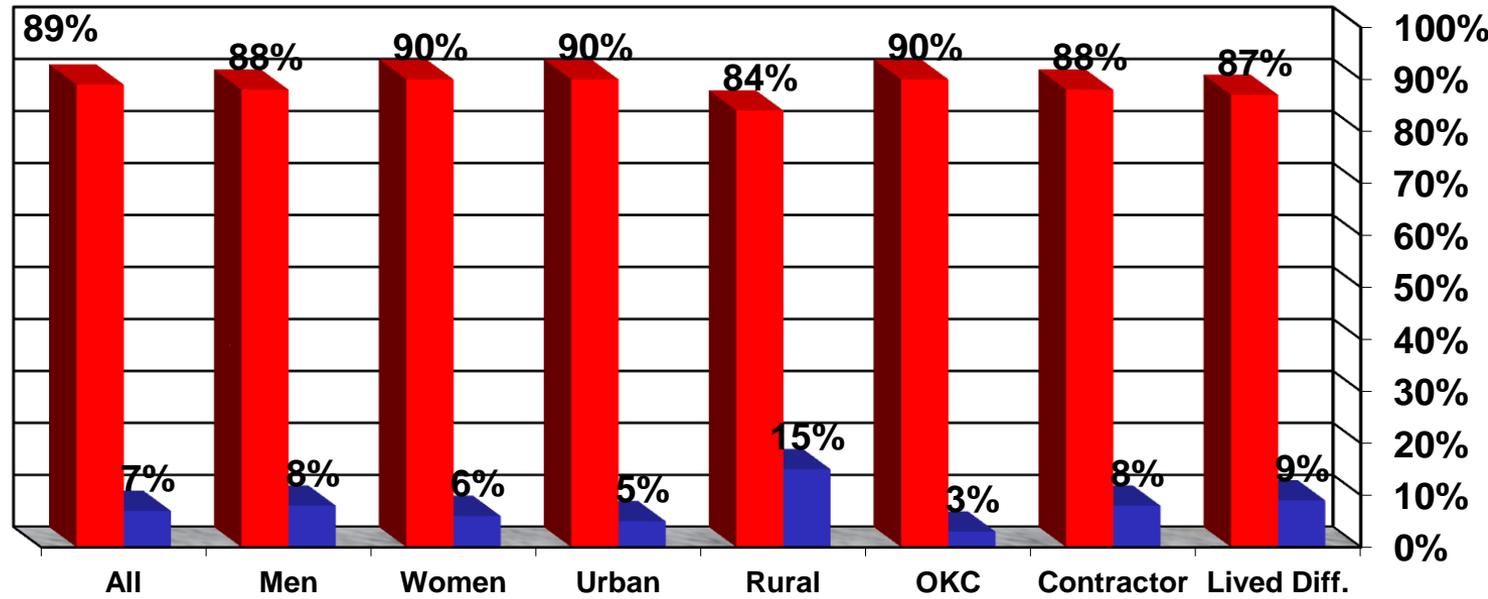
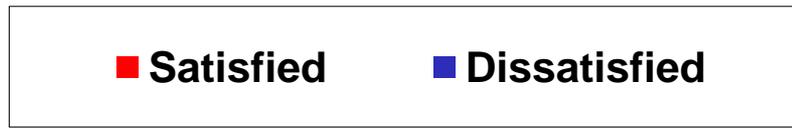
Despite this being a pocketbook issue, income is not correlated with willingness to pay.



Satisfied Bulky Waste Pickup?

Again, we see tremendous satisfaction – and again, we see the city provided service doing only slightly better than that of the contractor.

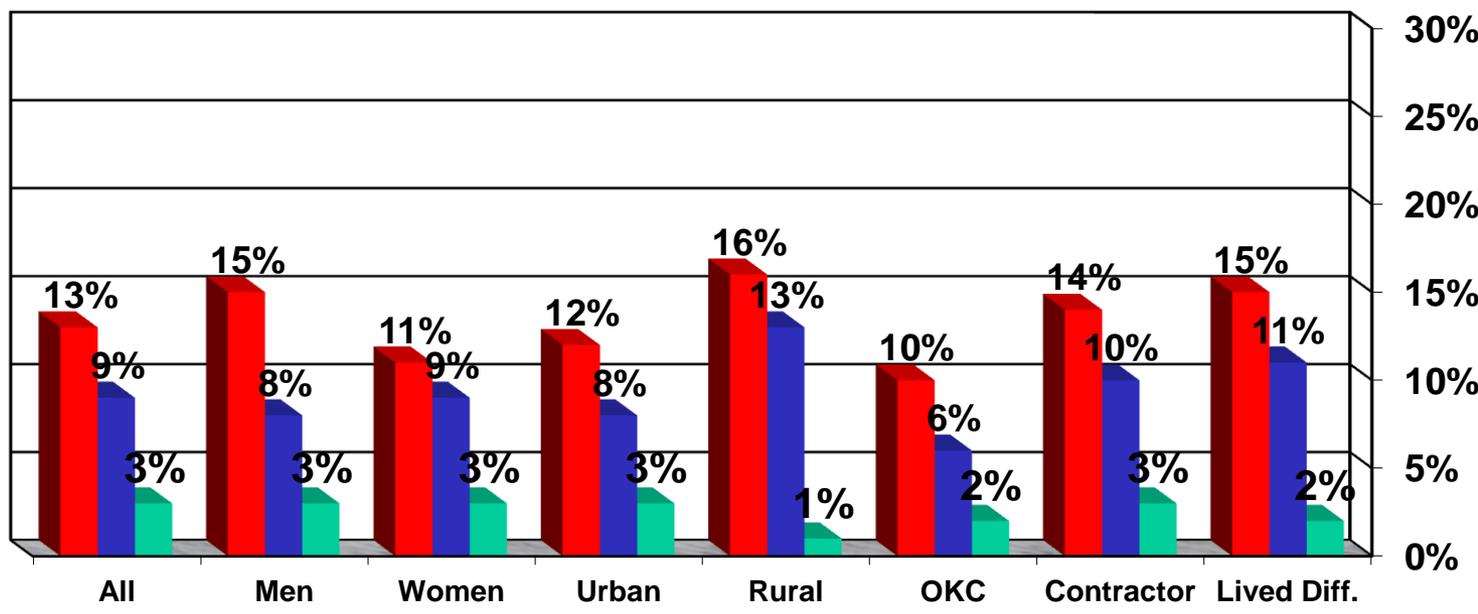
59% Strongly Favor; 30% Somewhat Favor; 4% Somewhat Oppose; 3% Strongly Oppose; 3% Undecided



Bulky Waste Pickup Changes?

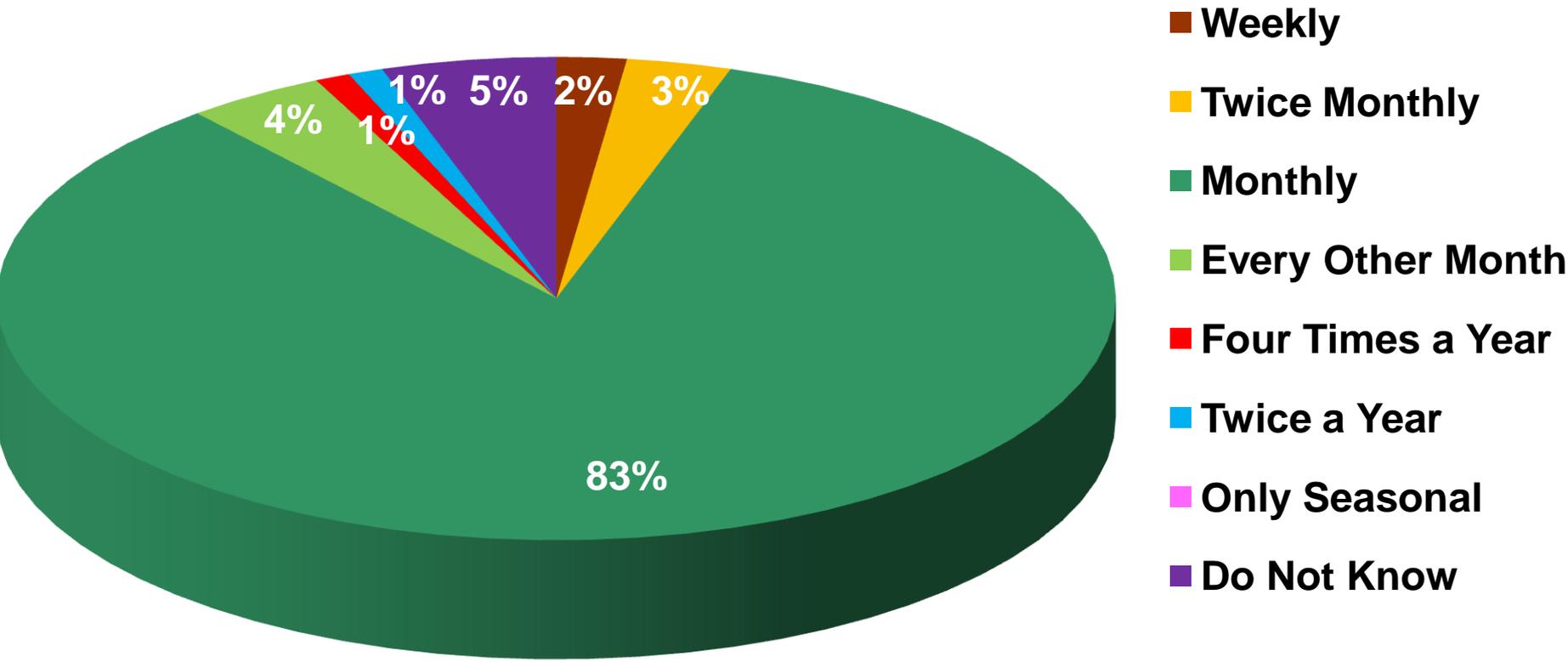
13% More Often; 9% Actually Pick it Up; 3% More Stuff; 6% Miscellaneous; 70% Undecided

■ **More Often** ■ **Actually Pick it Up** ■ **More Stuff**



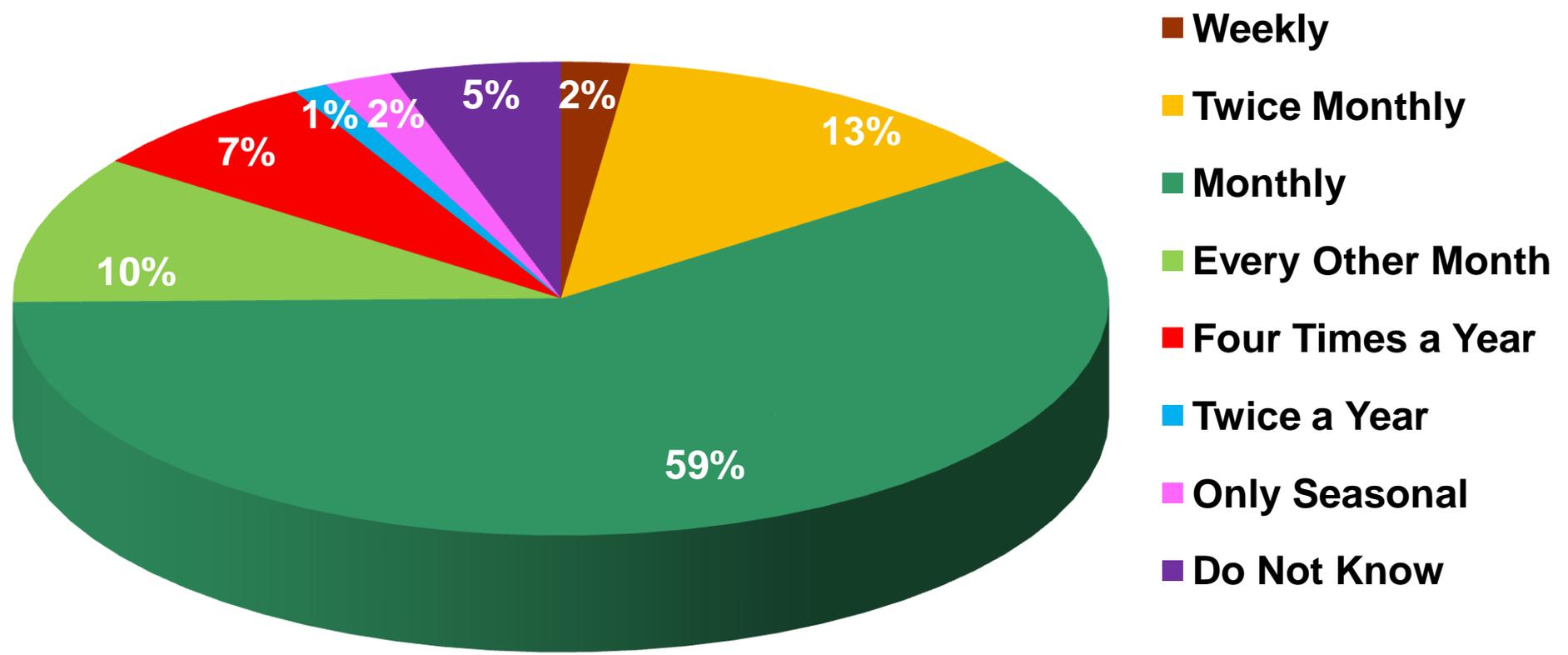
The key here is that 70% cannot answer this question. We do see substantially more requests among those served by the contractor (27%) than among those served by the city (18%). We see a similar disparity between urban and rural customers and those who have lived in a different environment all wanting change. .

How Often Bulky Pickup?



Residents overwhelmingly believe bulky pick-up happens monthly. Only 5% think it happens more frequently and 6% less often. We see very little difference among the various demographic groups.

How Often Bulky Pickup Wanted?

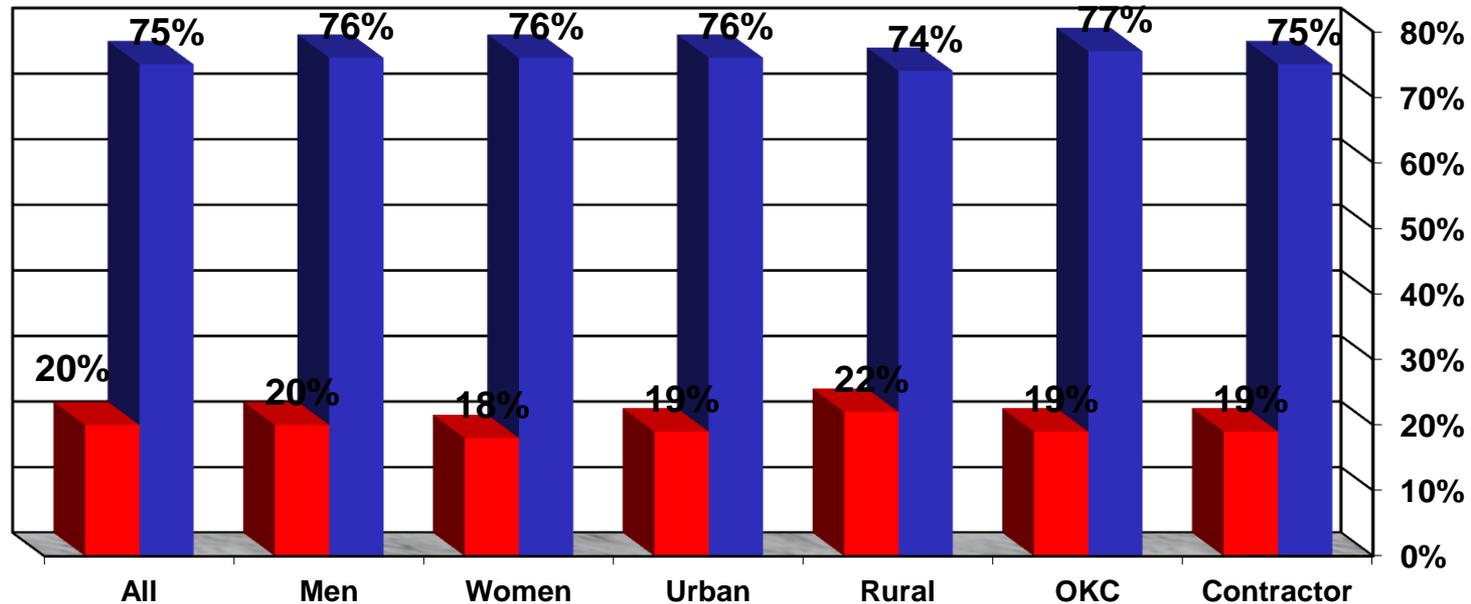


We see 15% wanting bulky waste pick-up more often and 20% wanting it less often. Clearly, the current situation is in a sweet spot for residents. It should be noted this question did include a statement about more frequent pick-up increasing the cost. Those making less than \$50,000 a year are actually the most likely to want more frequent pick-up (19%) while it drops to 14% among those making more than \$75,000. 23% of those under 45 would like to see more frequent pick-ups.

For \$1 to \$2 More, Favor Bulky Pickup More Often?

9% Strongly Favor; 11% Somewhat Favor; 17% Somewhat Oppose; 58% Strongly Oppose; 5% Undecided

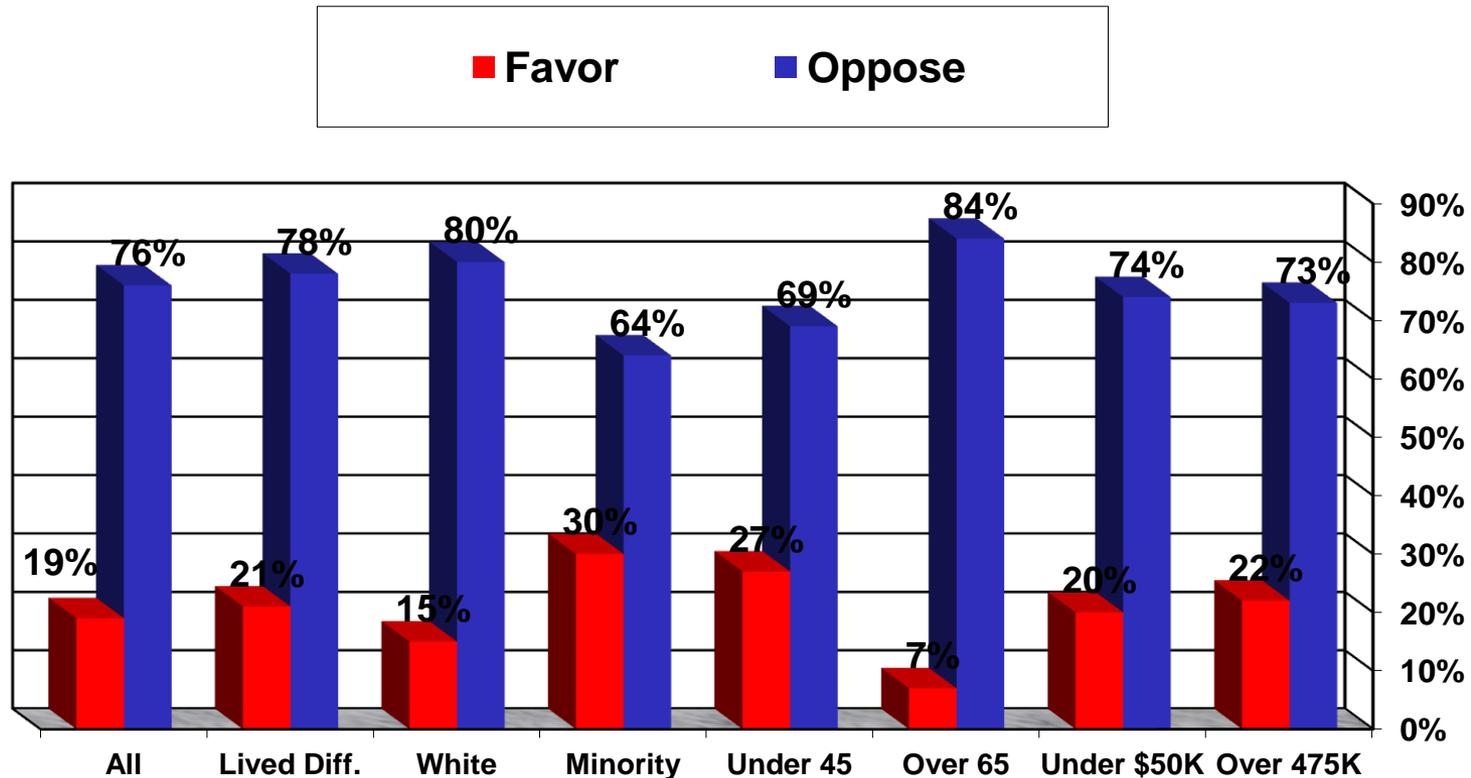
Only 19% of residents would support even a \$1 to \$2 increase in rates to have bulky rates picked up every other week. Notice that 58% strongly oppose such a change.



For \$1 to \$2 More, Favor Bulky Pickup More Often?

The minority community is a little more interested in having more frequent pick-ups, but senior citizens are strongly opposed.

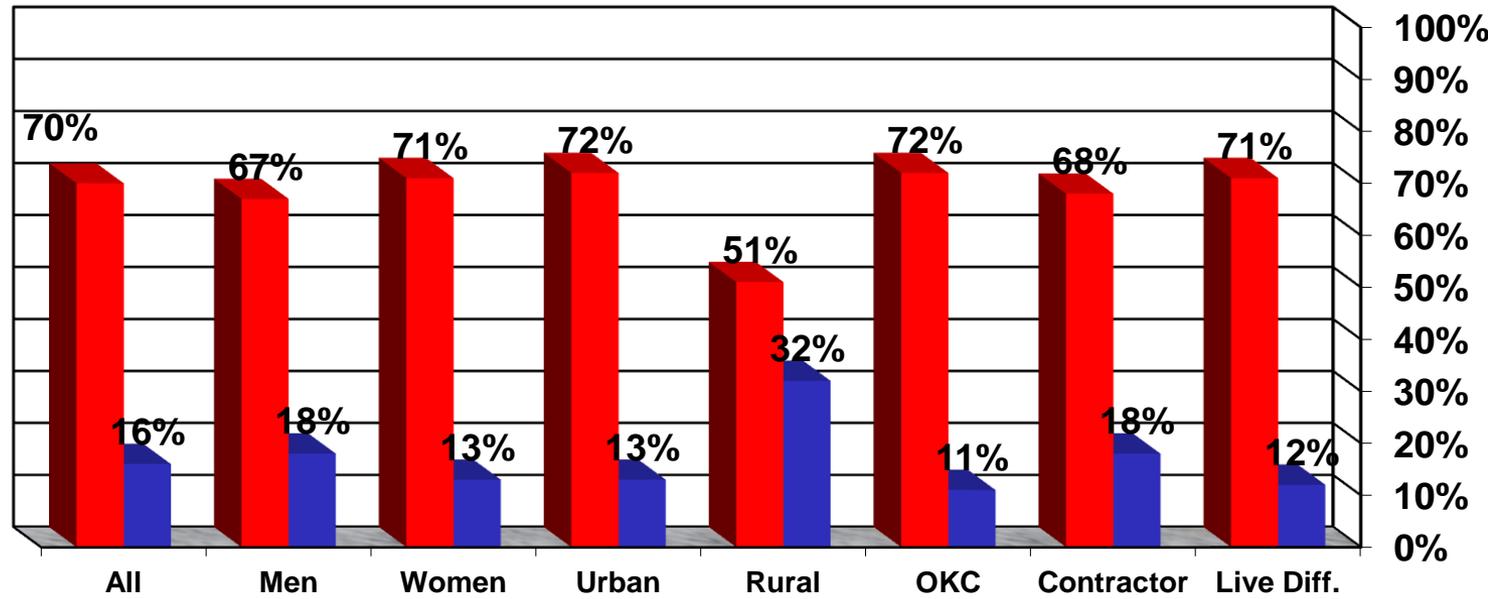
We see no significant difference along income lines.



Favor Recycling for Rural?

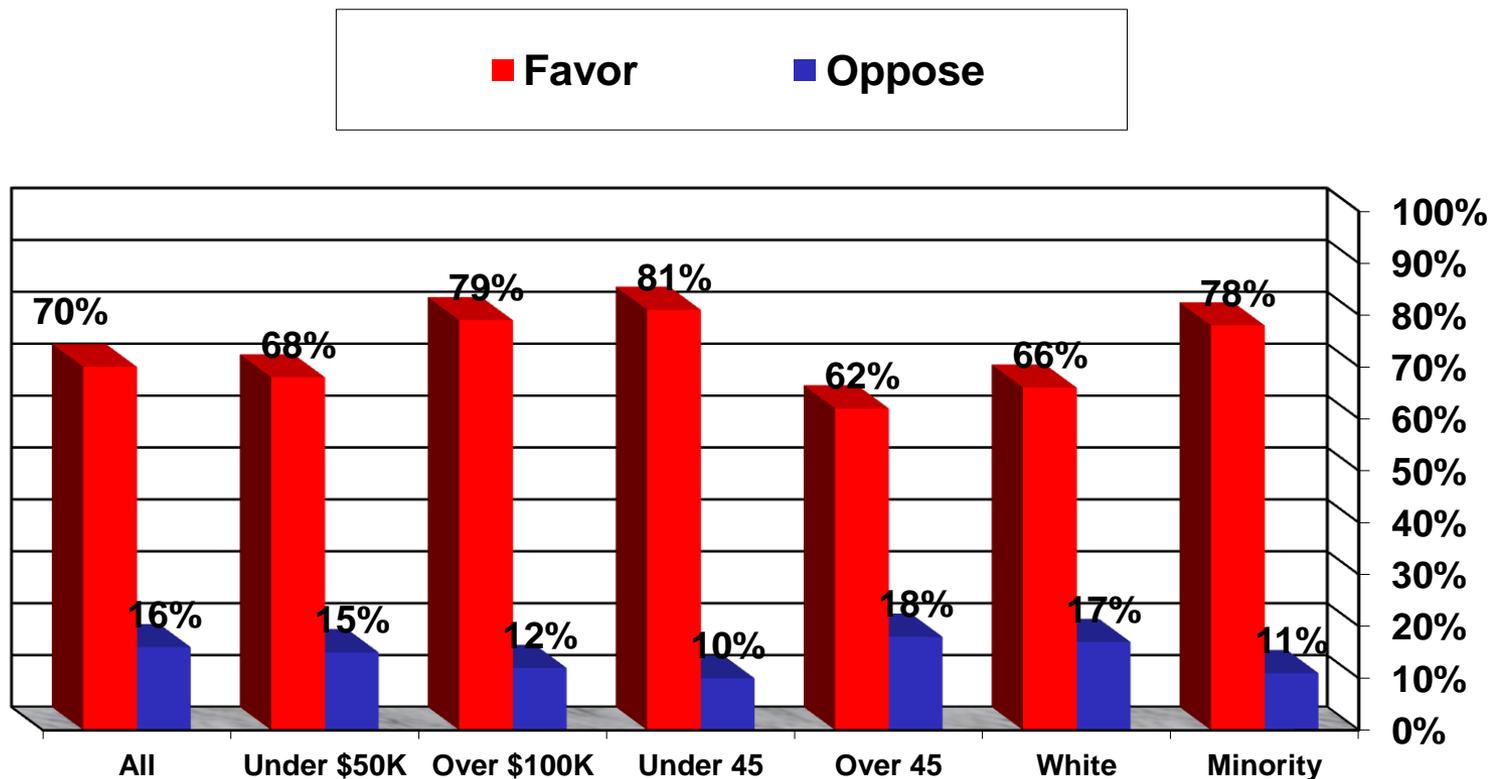
Support for rural recycling is weakest among rural customers.

42% Strongly Favor; 27% Somewhat Favor; 9% Somewhat Oppose; 7% Strongly Oppose; 15% Undecided

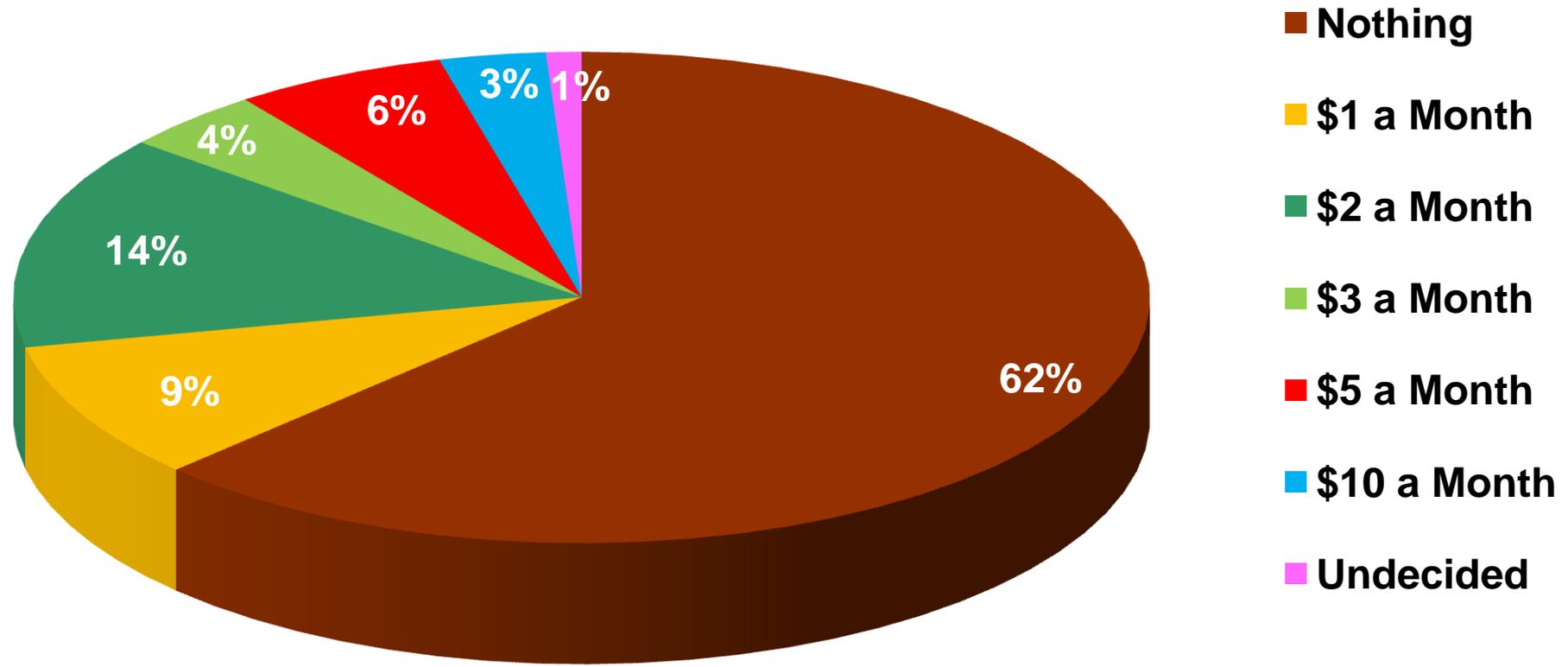


Favor Recycling for Rural?

This is one question where we do see some demographic differences – but in all groups we see very strong support for rural recycling.



Recycling Cost Willingness? (Rural Customers Only)

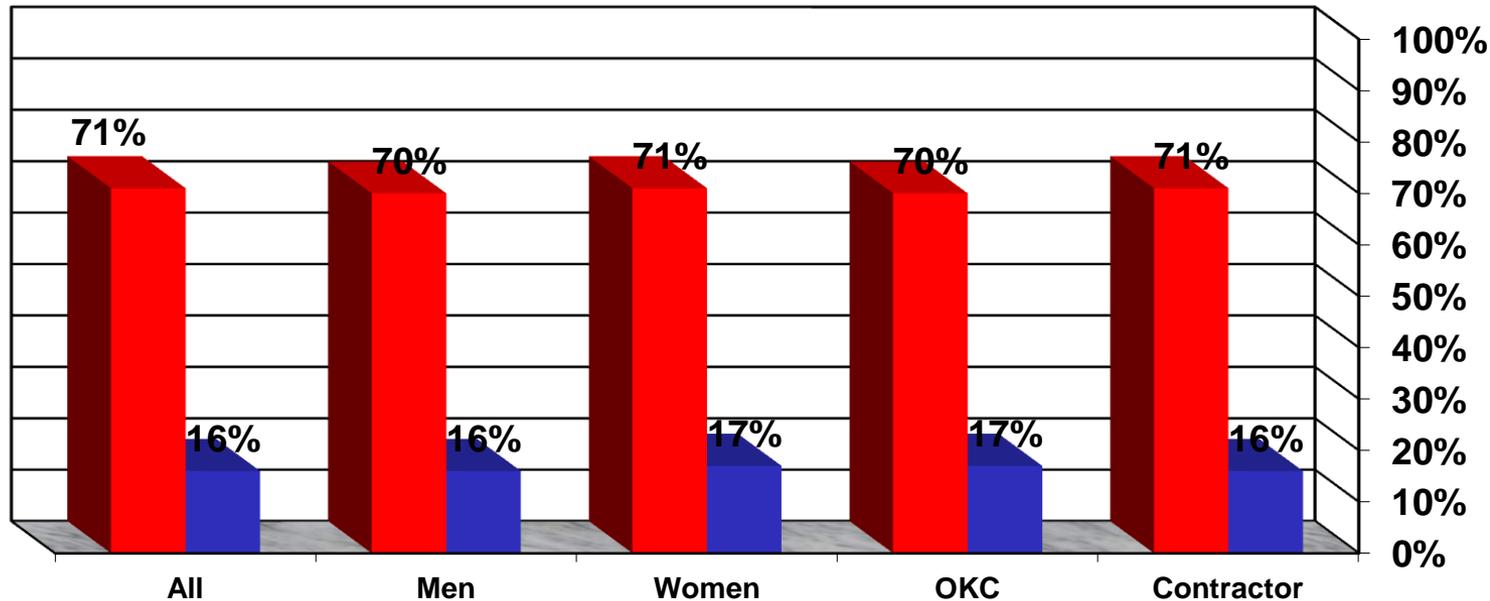


Given their lackluster support for a rural recycling program, it comes as no surprise that 62% of rural residents would not be willing to see their cost increase at all to provide this service. We do see a significant number, however, that would pay at least something. Fully 28% are willing to pay at least \$2 more a month. The cost, however, does become a factor and pushback should be expected.

Satisfied 18-Gallon Bins? (Urban Only)

42% Very Satisfied; 29% Somewhat Satisfied; 8% Somewhat Dissatisfied; 8% Very Dissatisfied; 13% Undecided

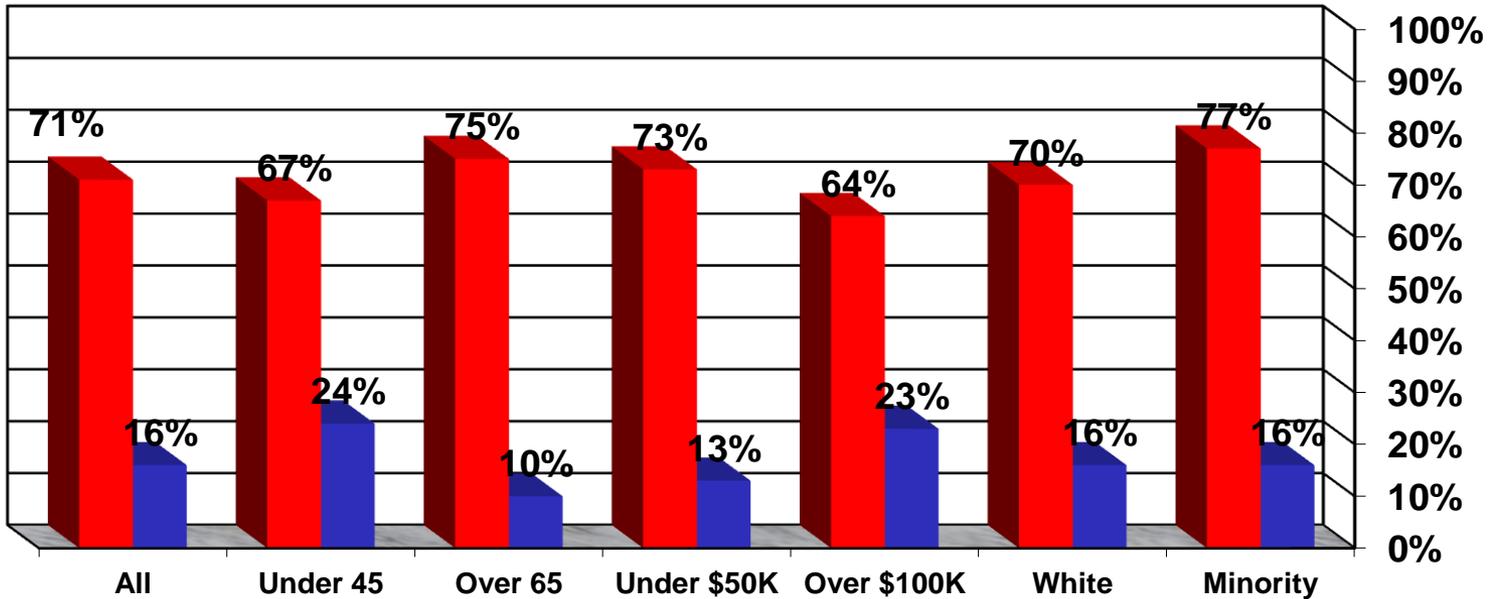
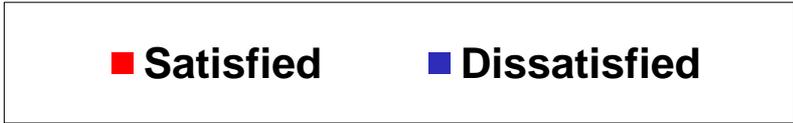
■ Satisfied ■ Dissatisfied



We see general satisfaction with the 18-gallon bins – but it is not as high as some of the other categories we have examined. Still, when looking at the ratio of the extremes, we see a better than 5-to-1 ratio. Clearly, there is not much clamoring for change. On this issue, contractor customers are almost identical to those getting service from the city.

Satisfied 18-Gallon Bins? (Urban Only)

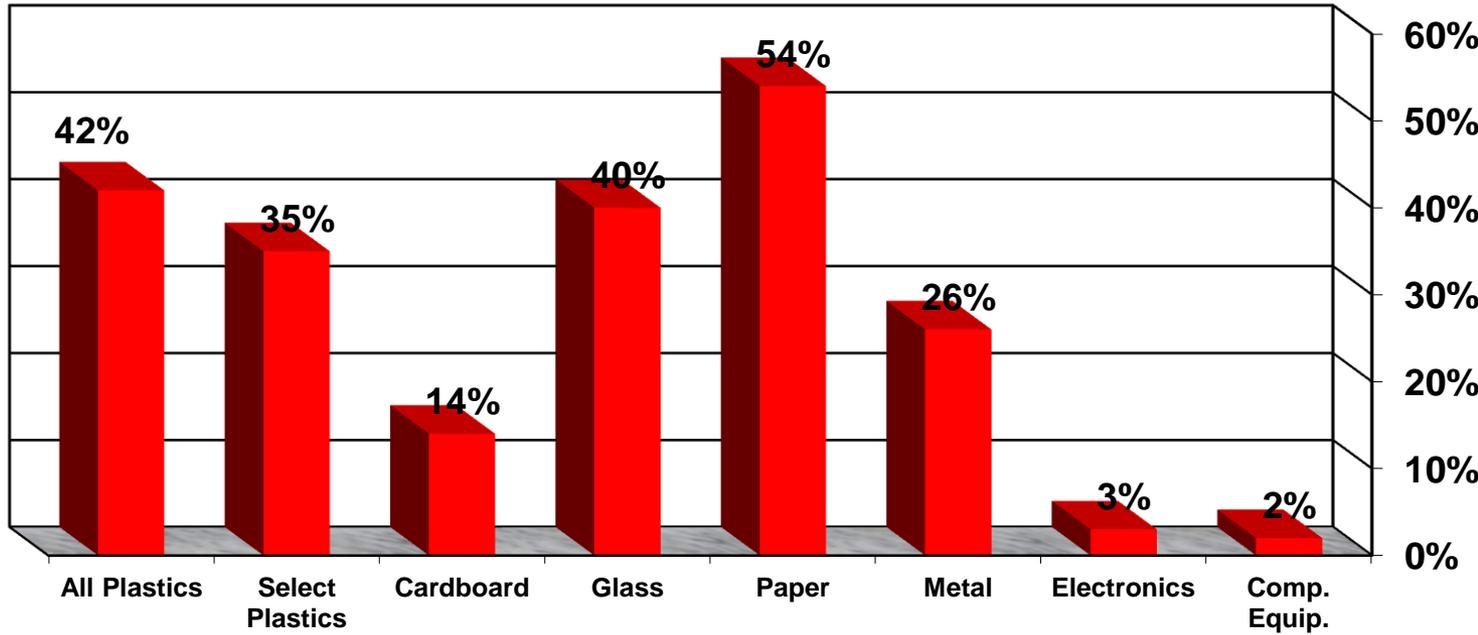
While satisfaction is still high among most groups, we do see a few differences. Those under 45, more affluent and white residents are more likely to express some dissatisfaction.



Understanding of Recyclables (Urban Only)

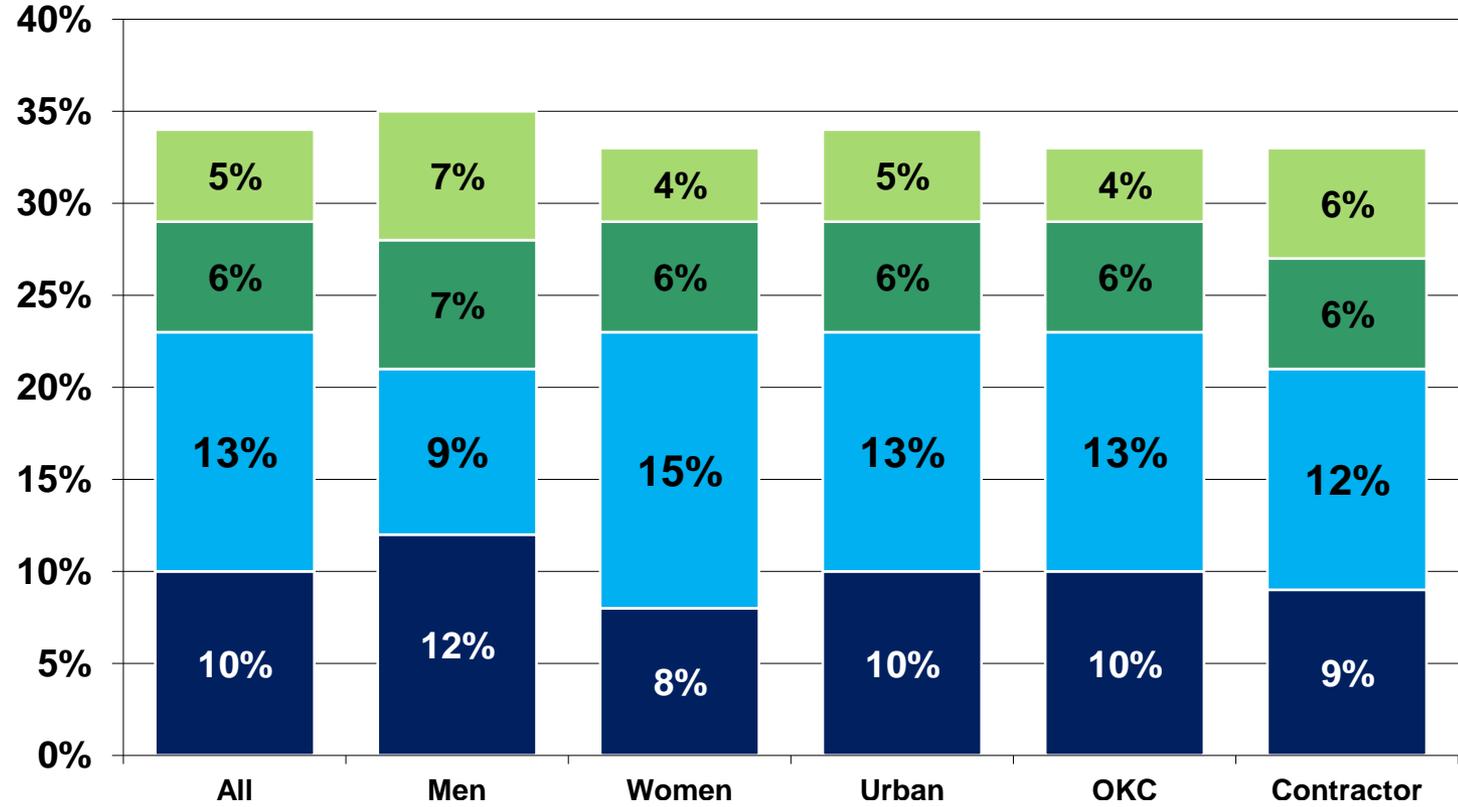
Clearly, many users are unaware of what items are recyclable. Just over half say paper is recycled.

■ Mentioned



Recycling Program Changes? (Urban Only)

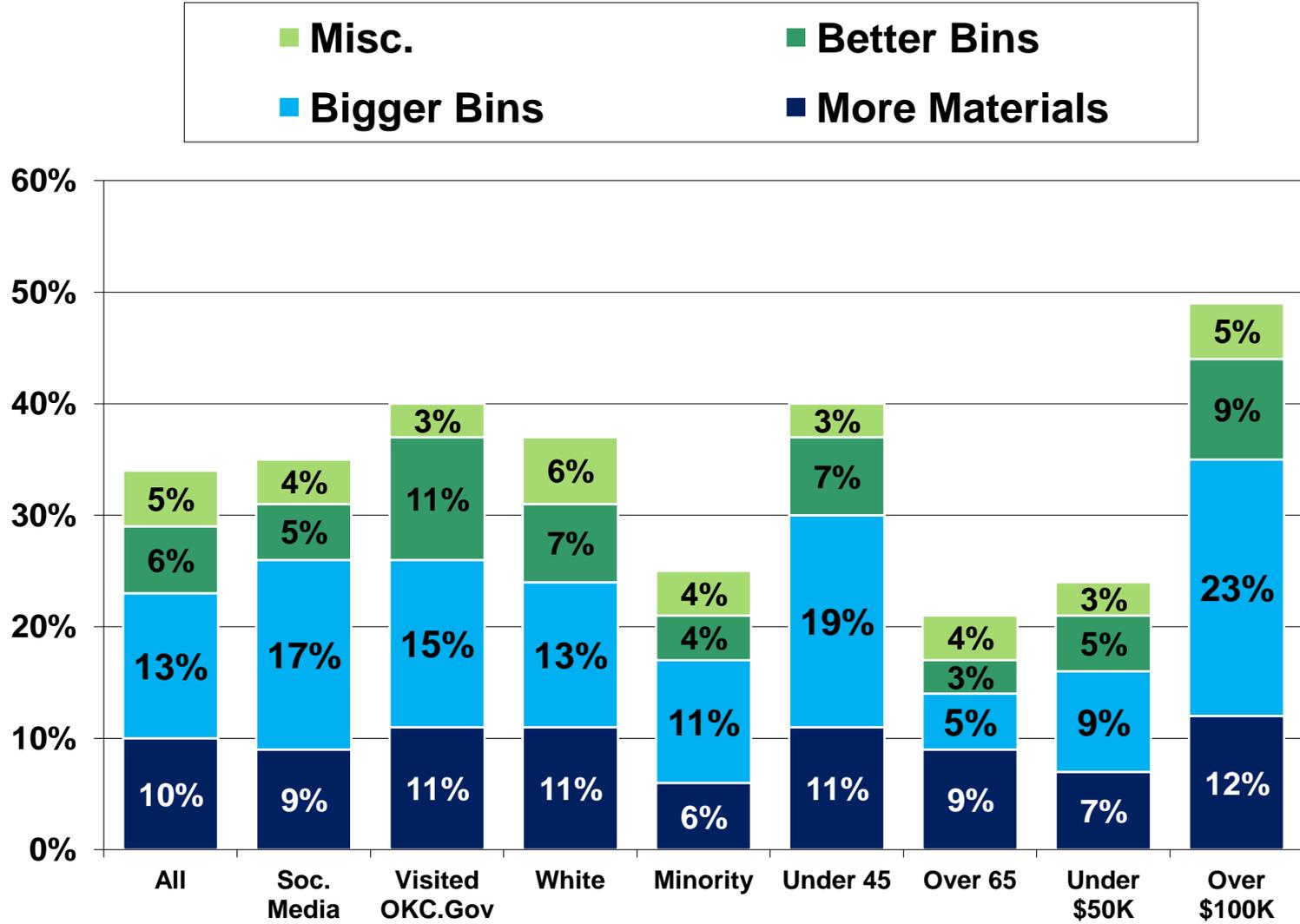
10% More Materials; 13% Bigger Bins; 6% Better Bins; 5% Miscellaneous; 67% Undecided



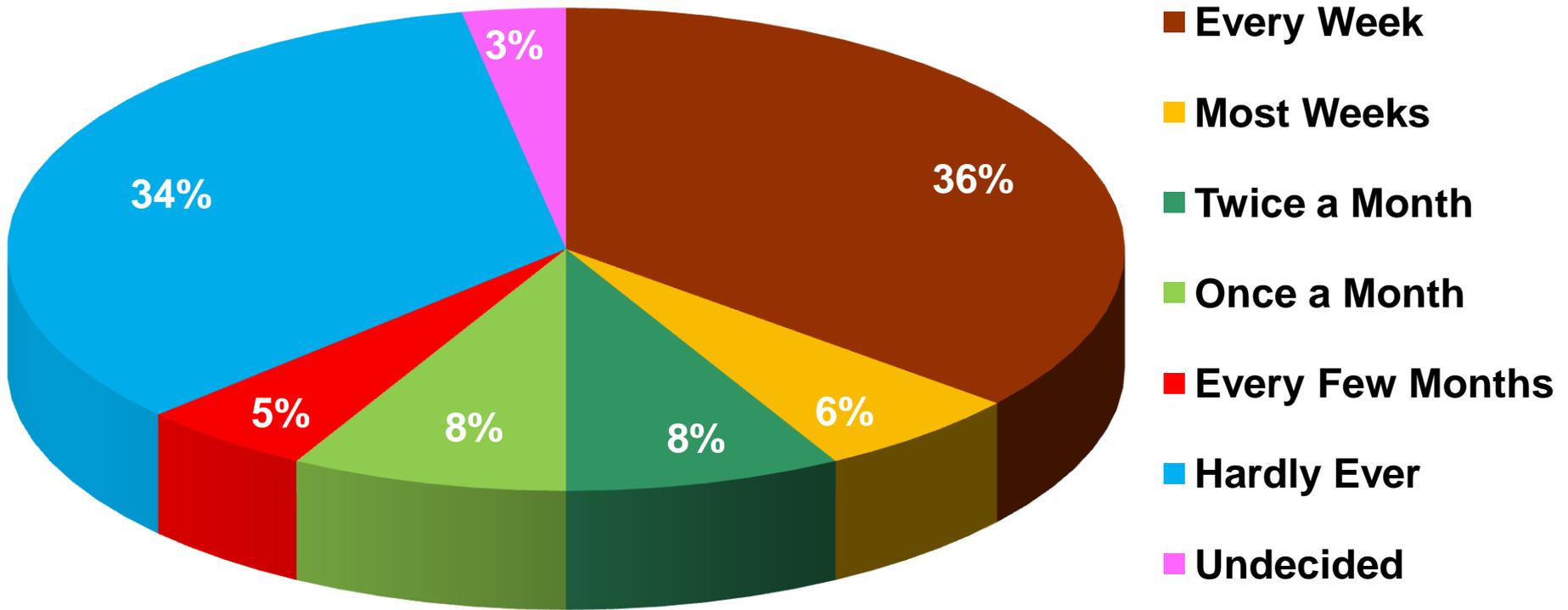
Again, we see little clamoring for change – 67% cannot say what they would change about the recycling program. We do see, however, almost 20% with concerns about the bins. A desire for bigger bins is a particular concern of women. Those who have lived in a different environment are also quicker to ask for a change.

Recycling Program Changes? (Urban Only)

On this issue, we do see some demographic differences. Whites, those under 45 and the more affluent all are much more likely to want changes.

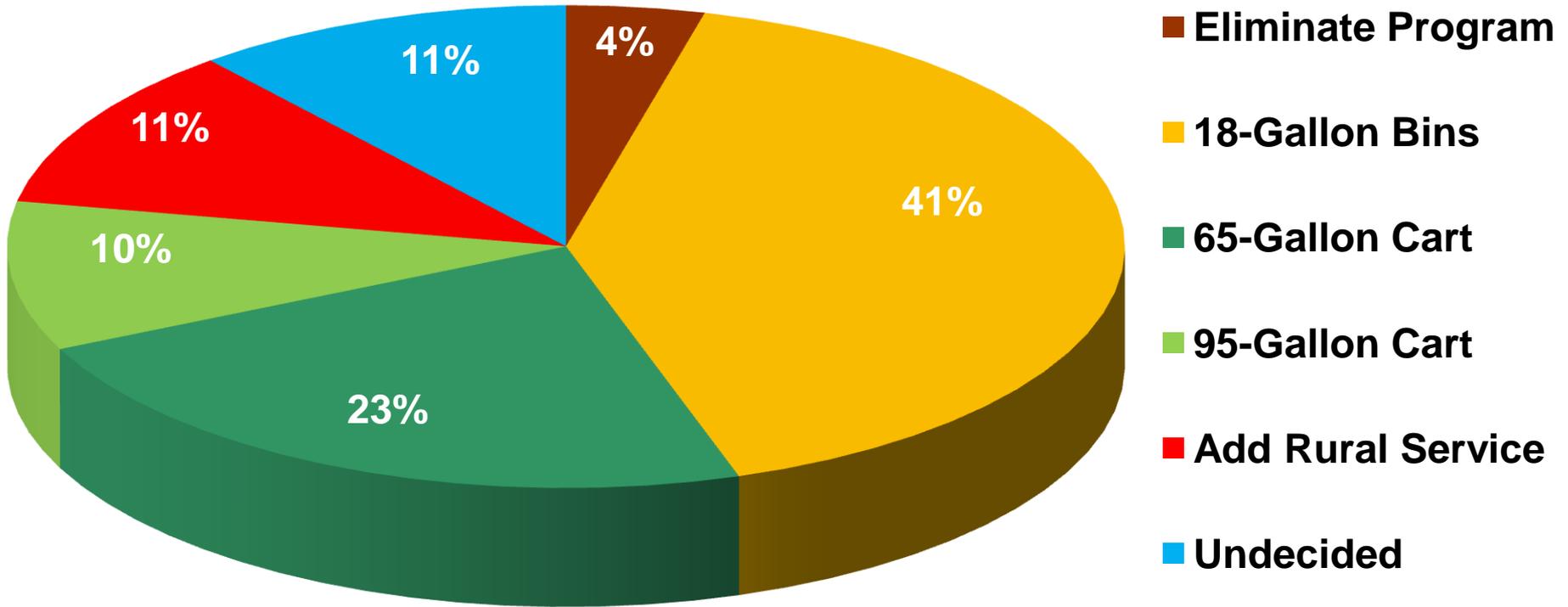


How Often Recycle? (Urban Only)



Given that a third hardly ever recycle, the 20% wanting a change in bins becomes a significant number among those who do recycle all a weekly basis. There are very strong income lines. Only 28% of those in households earning under \$50,000 recycle every week, while 45% of those earning more than that amount do so. This number escalates to 55% among those earning more than \$100,000.

Recycling Program Preference? (Urban Only)



We do see a third (33%) wanting to move to carts. This is higher among those who recycle regularly. Those who do not recycle tend to opt for keeping the current bins.

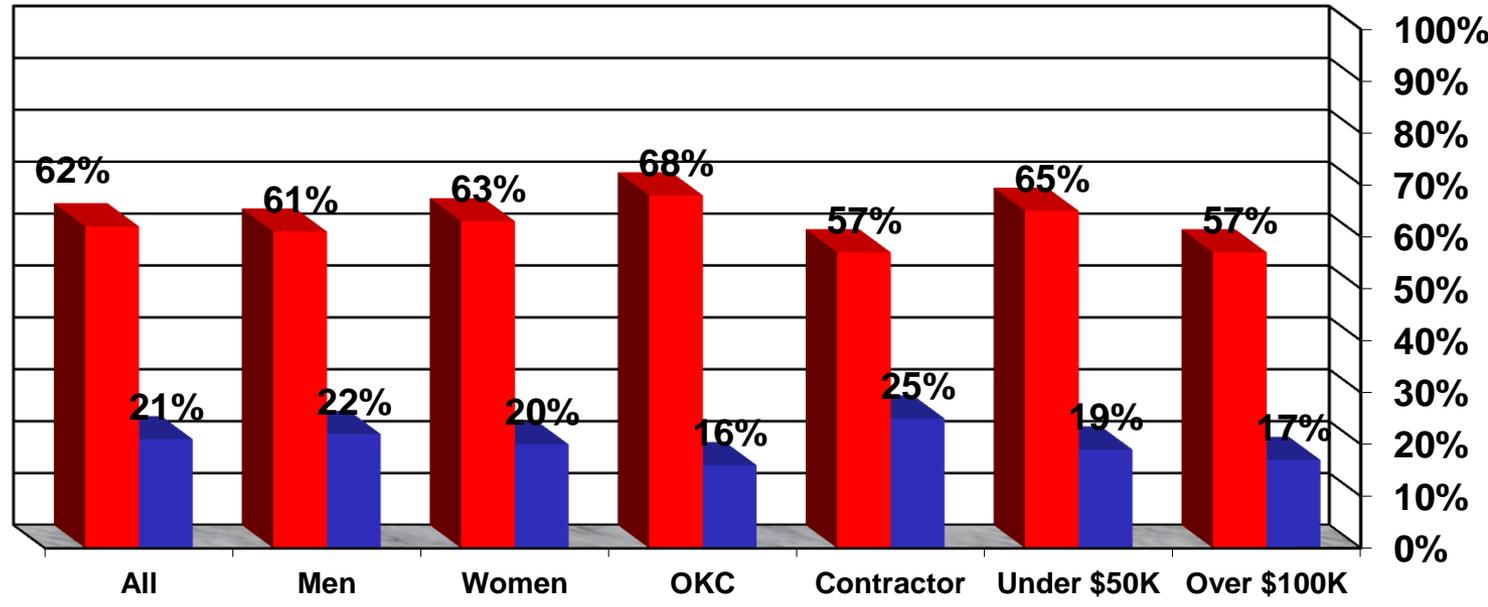
Favor Yard Waste in Carts? (Urban Only)

**37% Strongly Favor; 25% Somewhat Favor; 8% Somewhat Oppose;
13% Strongly Oppose; 17% Undecided**

This is one change residents do embrace, by almost a three-to-one margin.

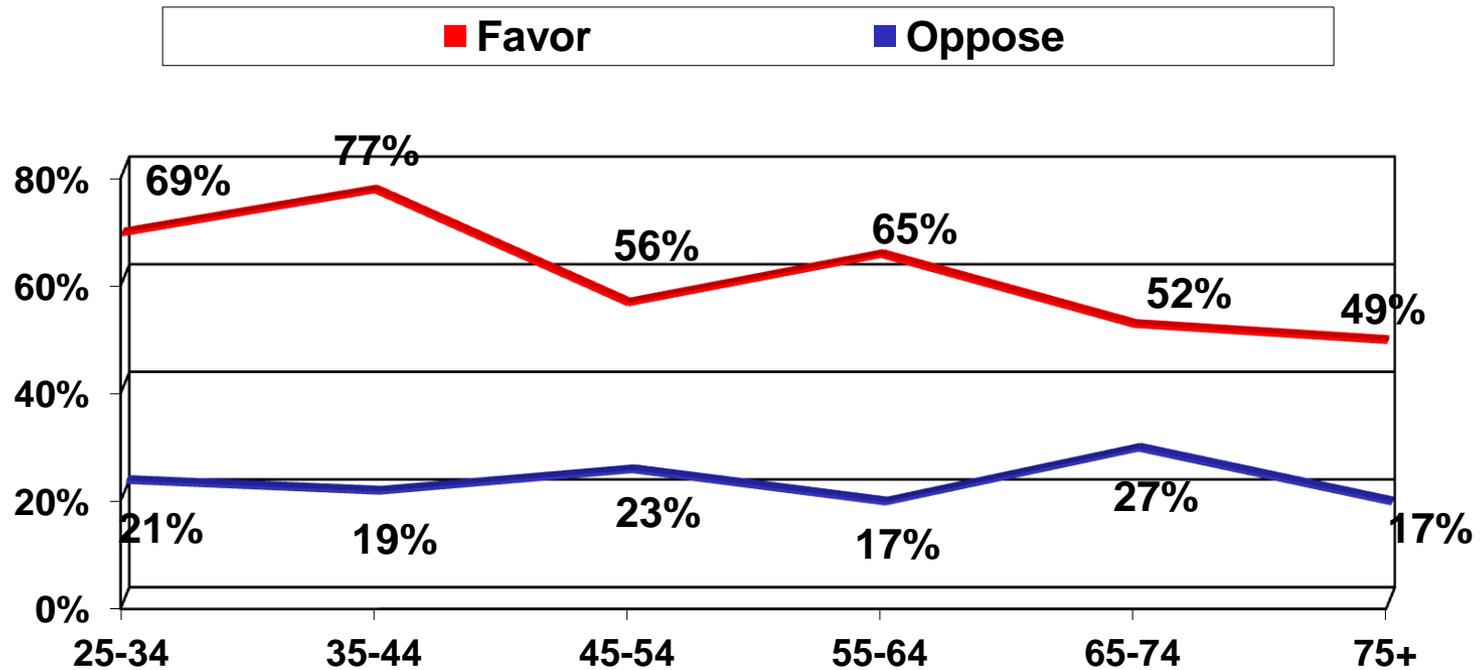
Note, this did say eliminating the bag pick-up could lower rates. This is not as popular among those on contractor routes.

We do see a slight income difference.

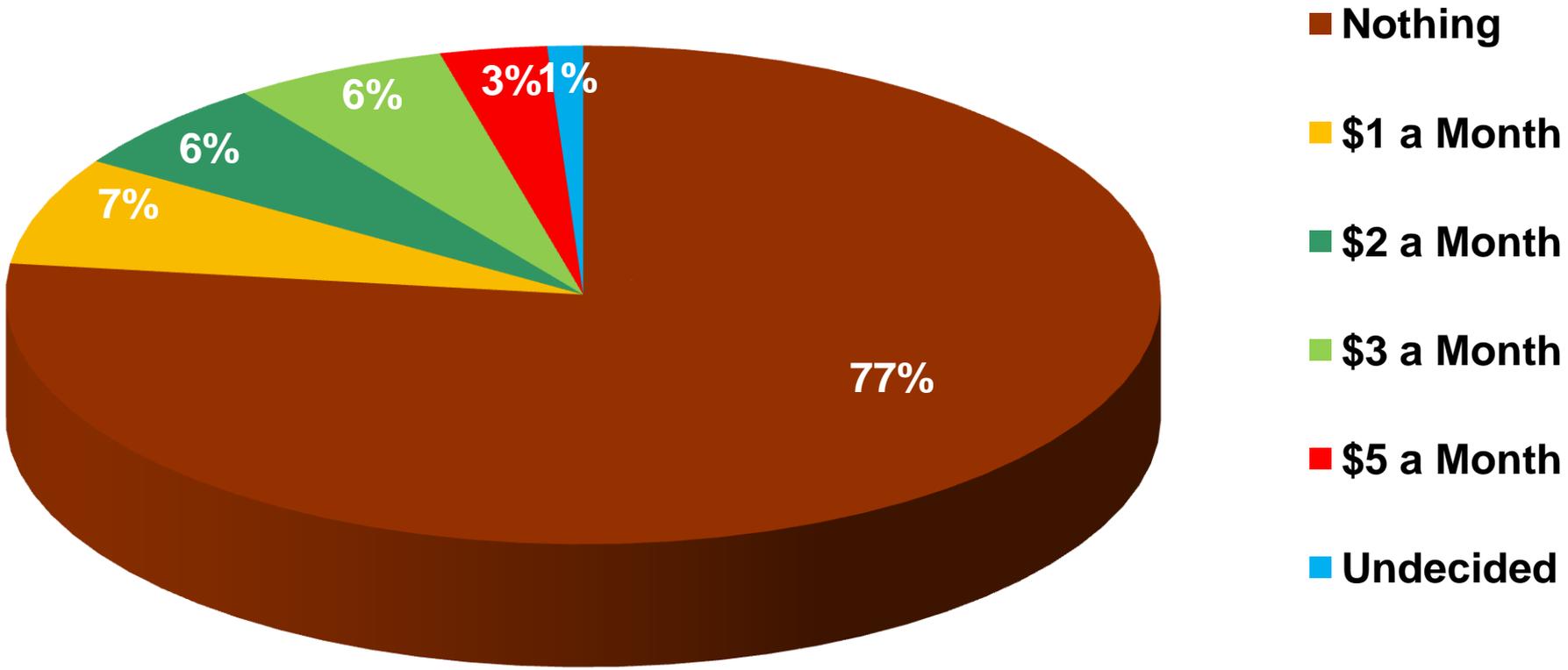


Yard Waste in Carts? By Age

While opposition does not really grow, support does decrease with age.



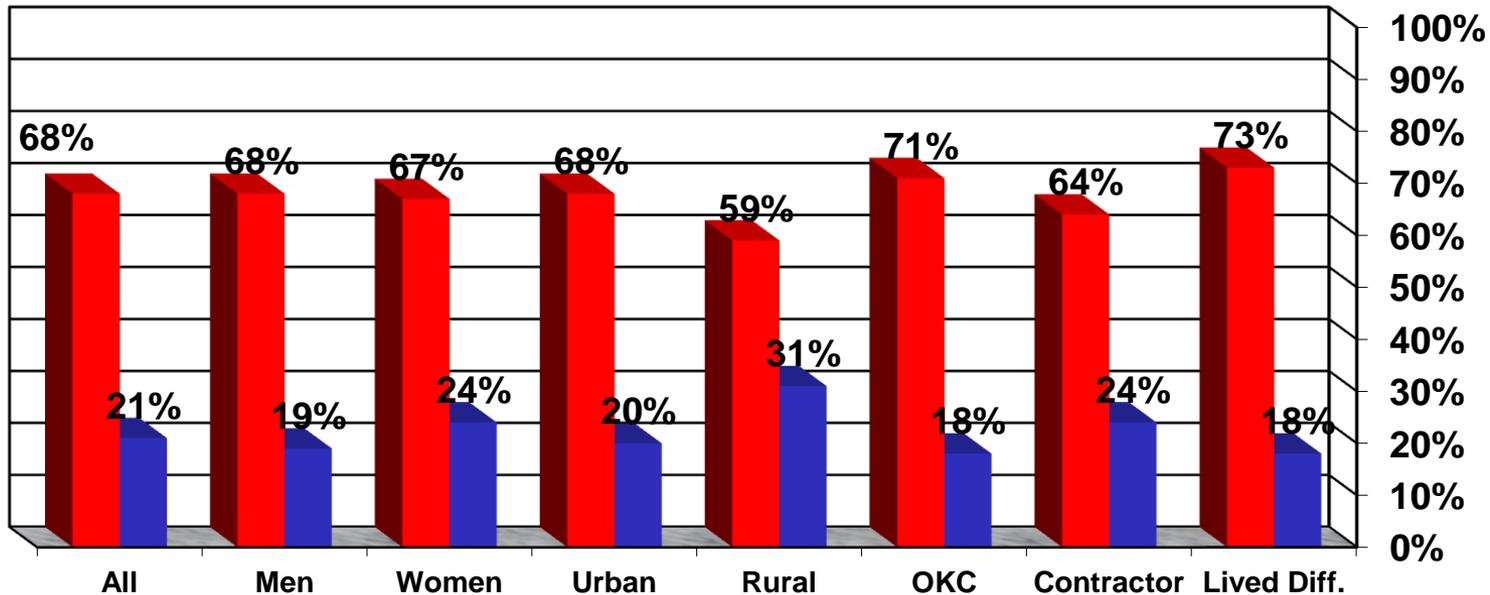
Yard Waste Cost Willingness? (Rural)



We see little appetite among rural customers to pay more for yard waste collection. Like with pay as you throw, it is not along income lines.

Favor Compost Collection?

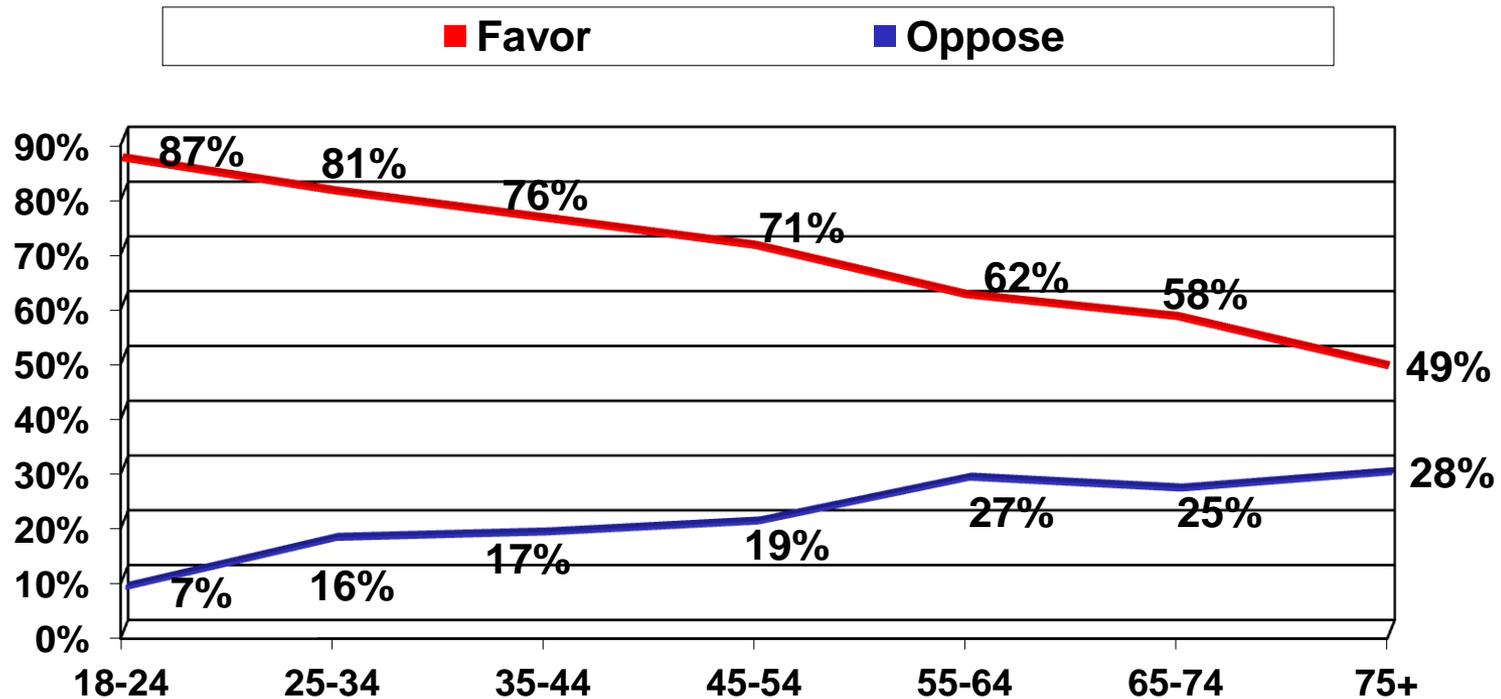
39% Strongly Favor; 29% Somewhat Favor; 8% Somewhat Oppose; 13% Strongly Oppose; 11% Undecided



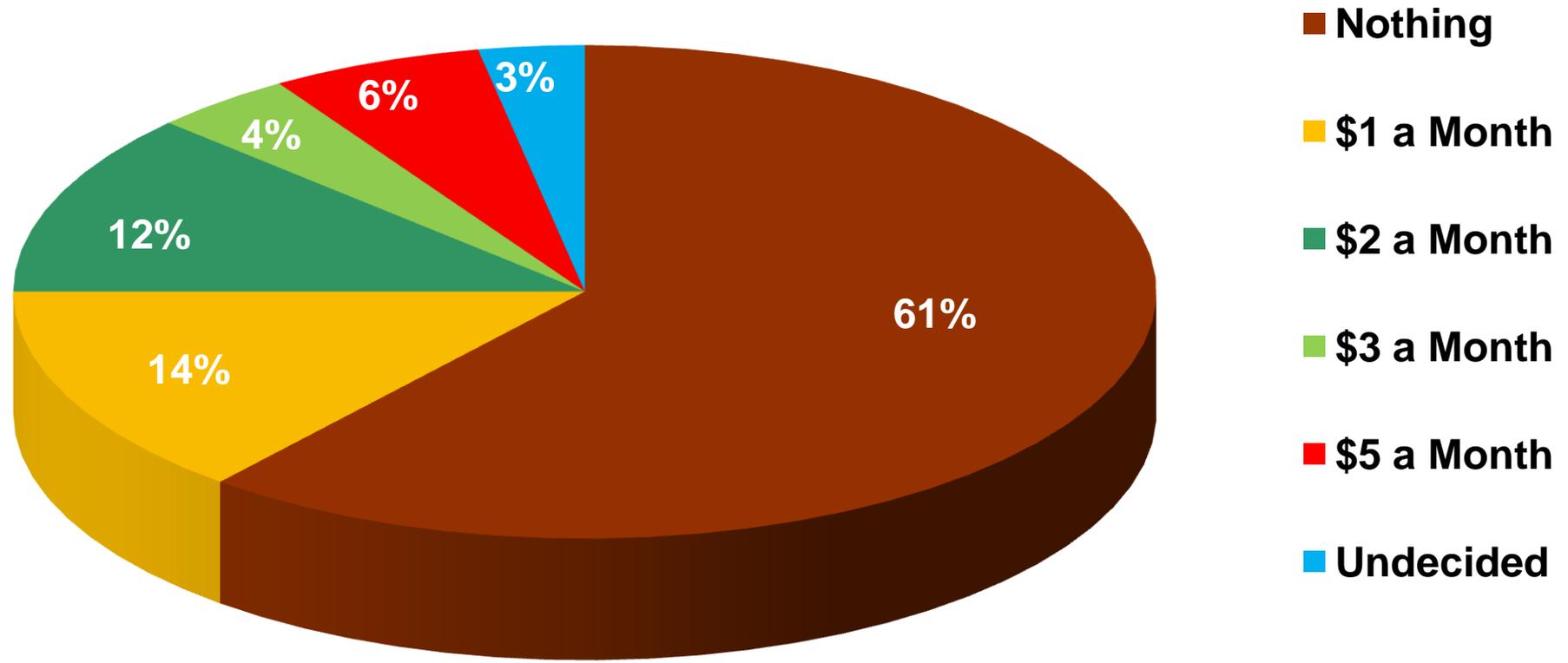
Two-thirds favor compost collection. It is not as desired in the rural areas – but even there, support hits 59%. Those who have lived in a different collection environment are the most supportive.

Compost Collection? By Age

While all age groups are supportive, this is clearly an issue where age is a statistically significant factor.



Compost Cost Willingness?



While still not overwhelming, we actually see more willingness for compost collection than for rural waste in the rural areas. However, among rural residents, opposition to paying more for compost collection is higher (74% nothing) than in the urban service area (59% nothing).

We have a majority of those under 45 willing to pay for this service, but the nothing increases to 75% among senior citizens.