

Four in five Ontarians support or somewhat support provincial funding being made available to waste and recycling operators; Vast majority thinks it is urgent or somewhat urgent to address landfill capacity.



The research gauged the opinions among Ontarians on landfills and recycling, more particularly the urgency to ensure adequate landfill capacity, the importance of diverting waste from landfills, the responsibility of recycling, and support for waste diversion programs and investments.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 501 Ontarians, 18 years of age or older, between December 30th, 2024 and January 5th, 2025 as part of an omnibus survey.

The margin of error for this survey is ± 4.4 percentage points, 19 times out of 20.

The research was commissioned by Waste to Resource Ontario and was conducted by Nanos Research.

KEY FINDINGS

1

A MAJORITY OF ONTARIANS SUPPORT OR SOMEWHAT SUPPORT ECONOMIC FUNDING FOR WASTE AND RECYCLING OPERATORS

Four in five Ontarians ([82%](#)) would support ([49%](#)) or somewhat support ([33%](#)) the province providing economic funding for waste and recycling organizations to invest in equipment, infrastructure and workforce development, as is available for other industries such as automotive and manufacturing. Only about one in ten ([12%](#)) Ontarians would somewhat oppose ([seven per cent](#)) or oppose ([five per cent](#)) such investments being made available to recycling operators and [six per cent](#) of respondents were unsure.

2

A VAST MAJORITY OF ONTARIANS SAY IT IS URGENT FOR GOVERNMENTS TO ENSURE ADEQUATE LANDFILL CAPACITY

Ontarians are approximately 15 times more likely to say it is urgent ([47%](#)) or somewhat urgent ([44%](#)) for governments to ensure adequate landfill capacity in Ontario than they are to say the matter is somewhat not urgent ([three per cent](#)) or not urgent ([two per cent](#)). [Three per cent](#) of respondents reported being unsure. Women ([94%](#)) were marginally more likely than men ([88%](#)) to say it is urgent or somewhat urgent for governments to ensure adequate landfill capacity in Ontario.

3

THREE IN FOUR ONTARIANS BELIEVE IT IS IMPORTANT TO INCREASE RECYCLING TARGETS

When asked about increasing recycling targets for regulated programs to ensure the province remains best in class diverting waste from landfill, about three in four respondents ([76%](#)) said they believe it is important to increase targets, as opposed to [16 per cent](#) who had a neutral opinion and [six per cent](#) who said it is not important. Women ([81%](#)) were marginally more likely than men ([71%](#)) to say it is important to increase recycling targets.

4

NEARLY ALL RESPONDENTS SAY INDUSTRIAL, COMMERCIAL AND INSTITUTIONAL ENTITIES SHOULD BE JUST AS RESPONSIBLE OR MORE RESPONSIBLE THAN RESIDENTS TO RECYCLE

About one in two Ontarians ([52%](#)) believe industrial, commercial and institutional entities should be just as responsible as residents to recycle, while just over two in five Ontarians ([44%](#)) believe they should be more responsible than residents to recycle. Only [three per cent](#) of respondents reported believing that industrial, commercial and institutional entities should be less responsible than residents to recycle.

5

CONSIDERABLE SUPPORT FROM ONTARIANS FOR PROVINCIAL INVESTMENT IN TECHNOLOGIES TO CONVERT WASTE INTO RENEWABLE ENERGY; PROGRAMS TO DIVERT WASTE FROM LANDFILL

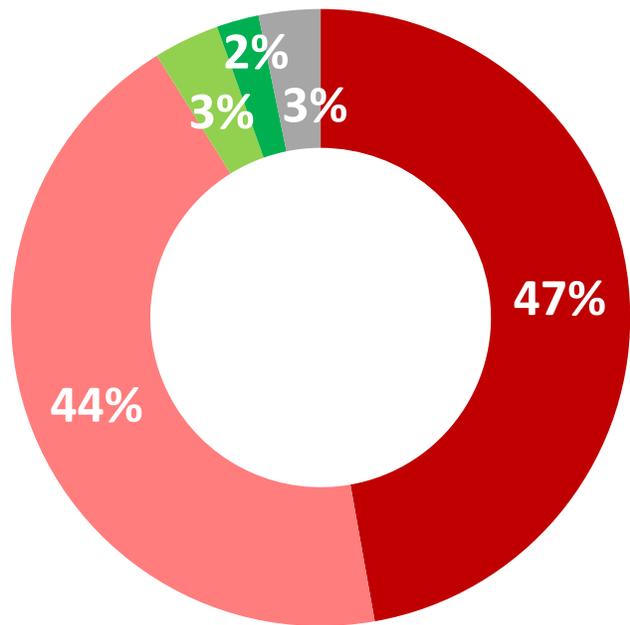
Ontarians are about 18 times more likely to support ([74%](#)) or somewhat support ([18%](#)) the provincial government investing in technologies that can convert waste into renewable energy sources, such as electricity or renewable natural gas than they are to somewhat oppose ([two per cent](#)) or oppose this ([three per cent](#)). Likewise, nine in ten Ontarians ([89%](#)) would support ([71%](#)) or somewhat support ([18%](#)) the implementation of food and organic waste collection programs in all residential homes and multi-residential buildings, while about one in ten ([nine per cent](#)) somewhat oppose ([four per cent](#)) or oppose this ([five per cent](#)).

6

ONTARIANS SAY MANUFACTURERS, DISTRIBUTORS AND RETAILERS SHOULD BE RESPONSIBLE FOR COSTS RELATED TO SAFELY DISPOSING OF PRODUCTS CONTAINING BATTERIES

Thinking of the disposal of items with batteries or appliances with a plug, just over three in four Ontarians ([77%](#)) agree ([39%](#)) or somewhat agree ([38%](#)) manufacturers, distributors and retailers should be fully responsible for the costs related to safely disposing of the products they produce, distribute or sell. Under one in five ([17%](#)) somewhat disagree ([seven per cent](#)) or disagree ([10%](#)) with this.

Urgency of adequate landfill capacity



- Urgent
- Somewhat urgent
- Somewhat not urgent
- Not urgent
- Unsure

Q – As you may be aware, existing landfills in Ontario are expected to be at full capacity (unable to take more waste and garbage) in about 10 years and moving forward there will not be sufficient capacity to manage waste in Ontario. In addition to dealing with capacity, we need to explore all waste reduction and disposal options available. Would you say it is urgent, somewhat urgent, somewhat not urgent or not urgent for governments to ensure adequate landfill capacity in Ontario?

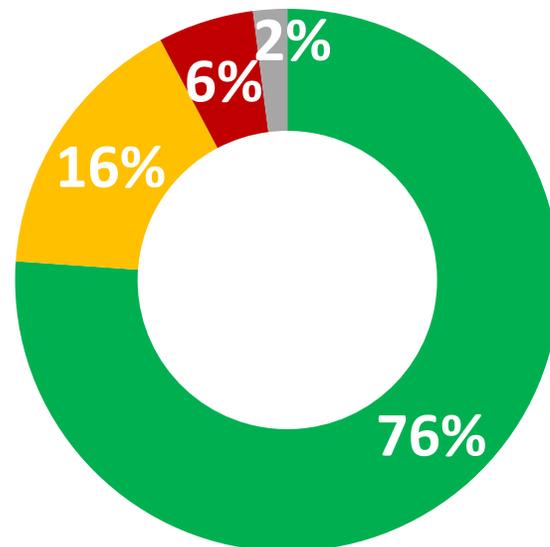
	Men (n=277)	Women (n=224)	
Urgent/Somewhat urgent	88.0%	94.1%	
	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
	89.5%	88.9%	94.0%
Not urgent/Somewhat not urgent	9.3%	2.2%	
	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
	7.1%	7.2%	3.4%

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Increasing recycling targets

Q – As you may be aware, Ontario has mandated recycling targets for electronics, tires, batteries, hazardous waste, and items disposed of in your Blue Box (including cardboard, paper, plastics, and beverage containers). For example, in 2025, battery recycling targets mandated for producers, manufacturers, and retailers are 50%, up from 40% in 2023. However, 2023 data shows that batteries were only recycled at the rate of 12%. On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important do you think it is to increase recycling targets for these regulated programs to ensure the province remains best in class diverting waste from landfill?



- Important (7-10)
- Neutral (4-6)
- Not important (0-3)
- Unsure

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

3 in 4 Ontarians

believe it is important (76%) to increase recycling targets for regulated programs, as opposed to about one in five Ontarians who have a neutral opinion on the matter (16%) or believe it is not important (six per cent).

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Increasing recycling targets - by demographics

Q – As you may be aware, Ontario has mandated recycling targets for electronics, tires, batteries, hazardous waste, and items disposed of in your Blue Box (including cardboard, paper, plastics, and beverage containers). For example, in 2025, battery recycling targets mandated for producers, manufacturers, and retailers are 50%, up from 40% in 2023. However, 2023 data shows that batteries were only recycled at the rate of 12%. On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important do you think it is to increase recycling targets for these regulated programs to ensure the province remains best in class diverting waste from landfill?

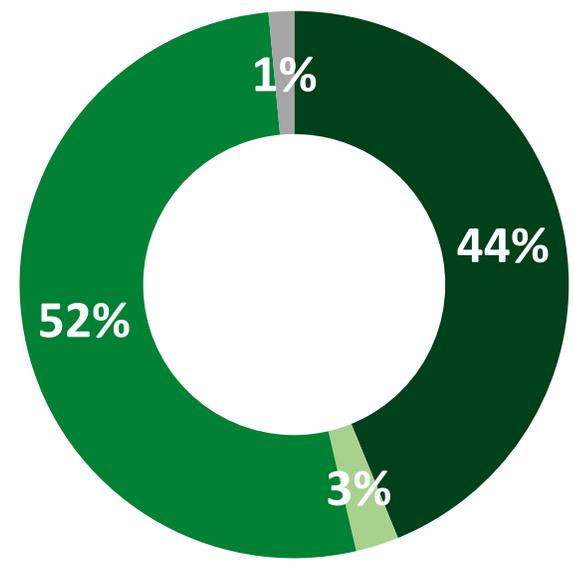
Importance (score out of 10)

	2025-01 (n=501)	Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
Mean score	8.0	7.7	8.3	7.8	7.9	8.3
Important (7-10)	76.1%	70.9%	81.0%	69.8%	75.7%	80.7%
Neutral (4-6)	16.2%	20.2%	12.4%	20.6%	15.4%	13.8%
Not important (0-3)	5.7%	7.1%	4.4%	6.2%	6.1%	5.1%
Unsure	2.0%	1.9%	2.2%	3.4%	2.8%	0.5%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Responsibility of recycling

Q – As you may be aware, residential recycling programs are the primary source of recycling in Ontario. Do you believe industrial, commercial and institutional entities such as large businesses, schools and hospitals should be less responsible or just as responsible as residents to recycle?



■ More responsible ■ Less responsible
■ Just as responsible ■ Unsure

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

	Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
More responsible	42.3%	45.3%	49.0%	45.1%	39.3%
Just as responsible	52.4%	51.9%	41.4%	51.7%	59.8%
Less responsible	3.7%	1.4%	6.2%	2.0%	0.5%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Investing in technologies to convert waste into renewable energy sources

Q – Would you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]
The provincial government investing in technologies that can convert waste into renewable energy sources, such as electricity or renewable natural gas



*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Support/Somewhat support				
Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
90.1%	94.6%	89.0%	92.2%	94.9%

Oppose/Somewhat oppose				
Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
7.3%	2.9%	7.6%	6.0%	2.6%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.



Programs to divert waste from landfills

Q – Would you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]
Implementing food and organic waste collection programs in all residential homes and multi-residential buildings to help divert more waste from landfills and increase reuse of organic waste



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

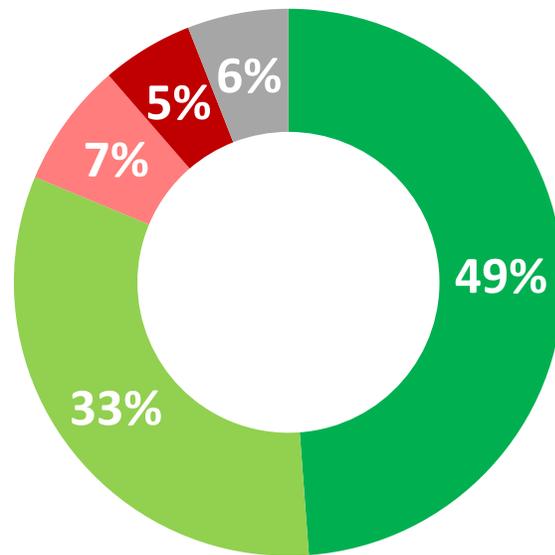
Support/Somewhat support				
Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
85.3%	91.6%	87.6%	88.3%	89.4%

Oppose/Somewhat oppose				
Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
10.8%	6.2%	7.6%	7.4%	9.8%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Funding for waste and recycling operators

Q – Currently, the provincial government provides both capital and operating funding opportunities for a wide range of industries such as automotive, manufacturing, technology, life sciences, agriculture, construction, and forestry. Would you support, somewhat support, somewhat oppose or oppose the province providing similar economic funding for waste and recycling organizations to invest in equipment, infrastructure and workforce development?



■ Support
■ Somewhat support
■ Somewhat oppose
■ Oppose
■ Unsure

	Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
Support/somewhat support	80.1%	82.4%	79.4%	78.7%	84.6%
Oppose/somewhat oppose	14.5%	11.1%	9.1%	16.0%	12.7%

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.



Nearly **2 in 3** Ontarians

report disposing of their appliances and items with batteries appropriately through specialized disposal sites (43%) or municipal special collection (22%). Over one in four report not disposing of those items correctly, either through regular household waste (17%) or their Blue Box Recycling bin (10%).

Disposing of items with batteries

Q – How do you dispose of items with batteries or appliances with a plug (including electronic toothbrushes, children’s toys, portable chargers, vapes, power tools, kitchen tools etc.)? Please select all that apply [RANDOMIZE]

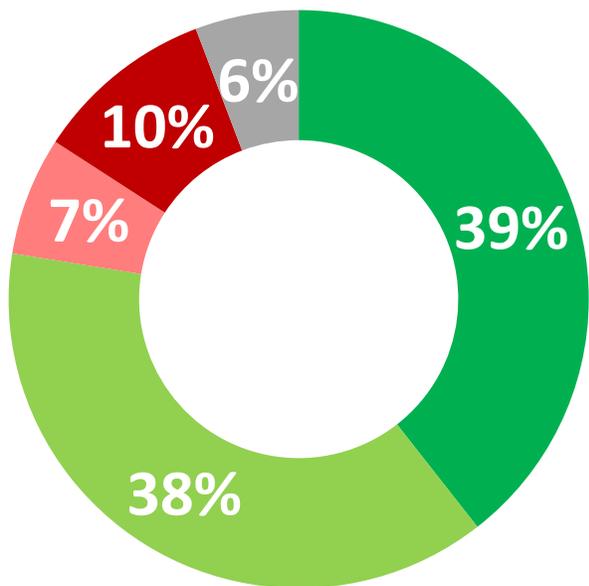
	2025-01 (n=501)	Men (n=277)	Women (n=224)	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
Take it to a specialized disposal site	42.9%	40.7%	44.9%	40.4%	43.5%	43.8%
Municipal special collection	21.5%	22.2%	20.9%	14.9%	21.3%	25.7%
Regular household garbage and litter/trash/waste	17.1%	19.2%	15.3%	22.4%	17.2%	13.9%
Blue Box Recycling bin	10.4%	11.4%	9.5%	11.0%	10.5%	10.0%
Other	7.2%	5.9%	8.3%	8.8%	7.5%	5.9%
Unsure	0.9%	0.6%	1.2%	2.6%	-	0.6%

*Percentage values are based on the proportion an activity represents of all response options (columns add up to 100%).

**Multifrequency tab based on multiple responses

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Responsibility of manufacturers, distributors and retailers in the safe disposal of their products with batteries or a plug



■ Agree ■ Somewhat agree
■ Somewhat disagree ■ Disagree
■ Unsure

Q – As you may be aware, fires caused by improper disposal of batteries cost waste and recycling operators over \$1 billion annually in the US and Canada. Thinking of the disposal of items with batteries or appliances with a plug, do you agree, somewhat agree, somewhat disagree or disagree that manufacturers, distributors and retailers should be fully responsible for covering the costs related to safely disposing of the products they produce, distribute or sell?

	Men (n=277)	Women (n=224)	
Agree/Somewhat agree	72.3%	82.5%	
	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
	81.9%	69.2%	81.2%
Disagree/Somewhat disagree	21.7%	11.9%	
	18 to 34 (n=61)	35 to 54 (n=205)	55 plus (n=235)
	13.3%	23.3%	13.8%

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 30th, 2024 to January 5th, 2025, n=501 Ontarians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

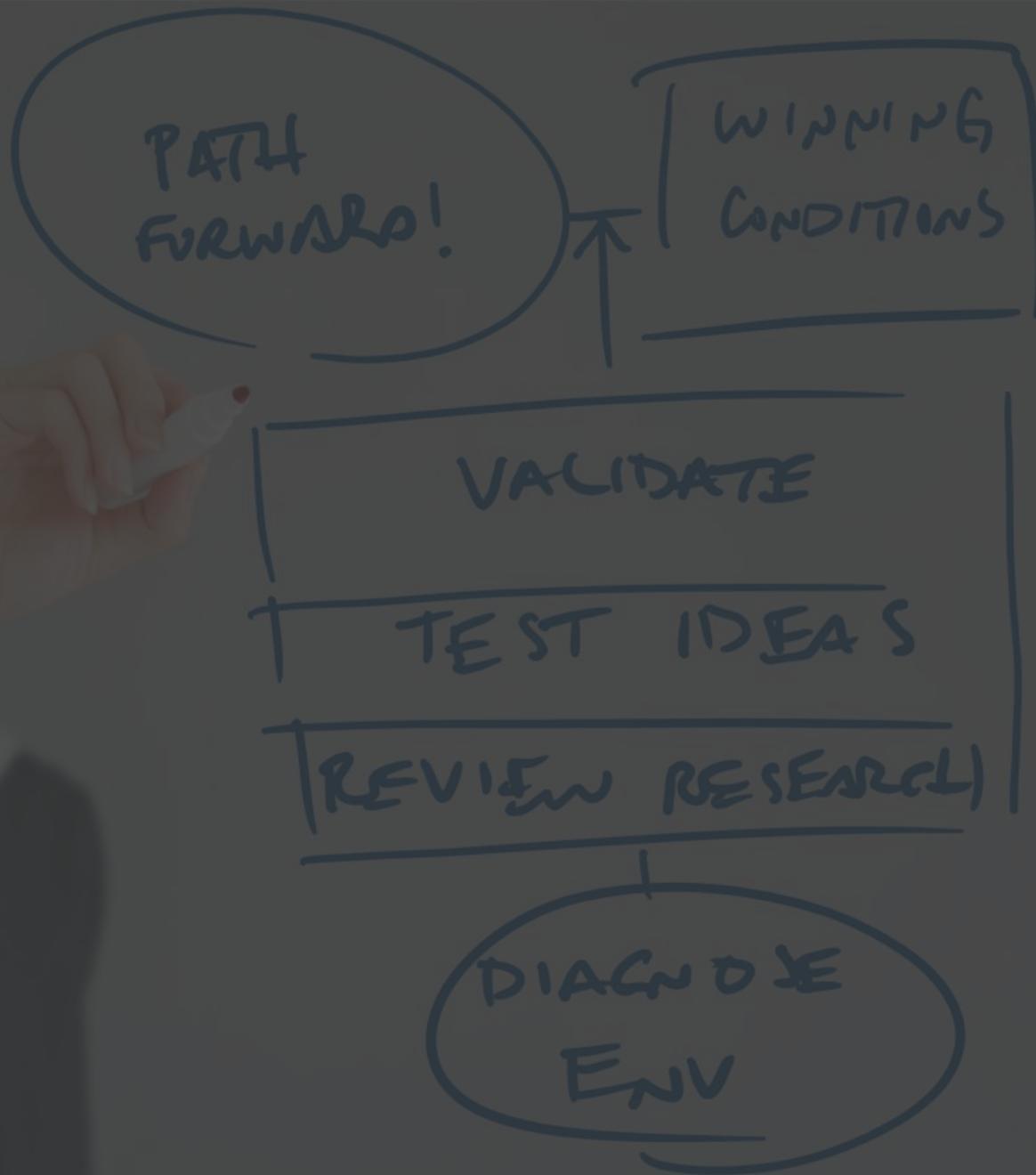
Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 501 Ontarians, 18 years of age or older, between December 30th, 2024 and January 5th, 2025 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Ontario.

Individuals were randomly called using random digit dialing with a maximum of five call backs.

The margin of error for a random survey of 501 Ontarians is ± 4.4 percentage points, 19 times out of 20.

The research was commissioned by Waste to Resource Ontario and conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.



Element	Description	Element	Description
Research sponsor	Waste to Resource Ontario	Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Ontario. See tables for full weighting disclosure.
Population and Final Sample Size	501 Randomly selected Ontarians.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Source of Sample	Nanos Probability Panel	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Type of Sample	Probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Ontario. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Margin of Error	±4.4 percentage points, 19 times out of 20.	Estimated Response Rate	14 percent, consistent with industry norms.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Ontario.	Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, U.S. relations, tax policy, federal politics, and feelings towards the federal government.
Demographics (Captured)	Ontario; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Research/Data Collection Supplier	Nanos Research
Number of Calls	Maximum of five call backs to those recruited.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com .
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Data Tables	By region, age and gender: 2024-2745 W2RO Dec - Formatted Tabs
Field Dates	December 30 th , 2024 to January 5 th , 2025.		
Language of Survey	The survey was conducted in English.		
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/		



As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence. Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process. www.nanos.co

nanos dimap analytika



This international joint venture between [dimap](#) and [Nanos](#) brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion. www.nanosdimap.com

EthicStratēgies

Ethic Strategies was created by the founding partners of [PAA Advisory](#) and the [Nanos Research Corporation](#), both recognized leaders in research, advocacy, and advisory. Ethic provides bespoke strategic counsel, advice, and communications strategies to organizations facing serious issues. www.ethicstrategies.com

Any questions?



Nanos Research

(613) 234-4666, ext. 237

ea@nanosresearch.com

For more information on the firm, please visit www.nanos.co





NANOS IS YOUR GO-TO HIGH-STAKES RESEARCH PARTNER.

Delivering world-class solutions since 1987,
we are the leader in high velocity data insights and visualization.

Market | Consumer | Reputation | Policy | Insight

For more information about our services, please visit us at:

www.nanos.co