

# Zero Waste Marin Research Findings

6 March 2026

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# Agenda

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02 Methodology

03 Executive Summary

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- Regional Attitudes and Behaviors
- Waste Management Attitudes and Behaviors
- Brand Attitudes, Affinity, and Perception
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- Additional Attitudes and Behaviors

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# Methodology

A survey of approximately 40 questions was fielded January -February 2026.

## Contents of the English survey included:

- Regional attitudes and behaviors
- Household waste management brand awareness, affinity, and perception
- Zero Waste Marin advertising awareness
- Evaluation of Zero Waste Marin video and poster
- Demographics and psychographics

## The survey had two audiences:

- Those recruited from a database of Marin residents “Panel,” N=128  
(margin of error= +/- 9%).
- Those who saw a survey link via community organization or city government “Organic,” N=154  
(margin of error= +/- 8%).

Two online 1.5 -hour focus groups were conducted in January 2026 with Marin County residents.

- There were 5 residents in the English-speaking group.
- There were 7 residents in the Spanish speaking one.

## Topics of the sessions included:

- Regional attitudes and behaviors
- Household waste management awareness, affinity, and perception
- Zero Waste Marin website, composting description, and advertising evaluation (video and poster)

**Robin Boyar conducted the English session.  
Begonia Martinez conducted the Spanish session.**

*Note: There were statistically significant differences between the two audiences. The Panel audience had a 50/50 gender split and was younger (median age 38). The Organic audience was 74% female and older (median age 68), and more likely to live in a detached single -family home.*

# Goal and Objectives

**Provide foundational consumer insights (e.g., attitudes, motivations, behaviors) to inform future Zero Waste Marin positioning and communications.**

- Understand awareness and purpose of Zero Waste Marin
- Determine attitudes, behaviors, and motivations around household waste management
- Evaluate Zero Waste Marin advertising
- Identify areas of opportunity as it relates to content and communications

# Executive Summary

- Research findings from the survey and English and Spanish focus groups were consistent in highlighting the strong lifestyle, community, and eco-friendly attitudes of Marin residents.
- Attitudinal and behavioral differences between the two survey audiences highlight a generation divide between “acceptors” and “rejectors.”
  - The link shared organically (74% female, median age 68) were more likely to be “acceptors,” own a single-family home, and engage in more environmental-friendly attitudes and behaviors.
  - The “Panel” audience (50% male, median age 38) were often less likely to engage in these behaviors, be less educated about waste disposal, and perceive it to be more difficult.
- Despite relatively strong awareness, many were unaware of ZWM’s goals or programs.
  - Unaided awareness of Zero Waste Marin was modest (23% Panel and 6% Organic).
  - Aided awareness of Zero Waste Marin was strong (88% Panel and 83% Organic).
  - 48% of Panel and 26% of Organic participants were aware of ZWM’s hazardous waste center.
- Aided advertising awareness of Zero Waste Marin was very positive.
  - 41% of the “Panel” audience and 48% of “Organic” audience had seen ZWM advertising.
  - Of those that saw advertising, about a third noted they learned something.
- Many did not realize that composting was the law and would be more incentivized to do the right thing if they knew there were benefits (e.g., reduce what goes to the landfill).
- Focus group participants had a modest reaction to the website, finding it sterile and wordy.
- Among those that saw ZWM advertising in real time or reviewed it in the survey and/or the focus groups, they generally appreciated the campaign for its informative and funny tone.
  - The Spanish speaking focus group audience had mixed reaction to the video and poster, finding the Avocado-man sad, and the wordplay not being fully translated.
- Moving forward, a friendly collective tone highlighting key information and the direct benefit to Marin County would benefit both English and Spanish speakers of all ages.

[Marin] I've seen how conscious people are, even on the trails. They bring reusable bags to the grocery store. People look out for each other.”  
- Resident, English-speaking group

[Life in Marin] “The biggest difference I've seen is the demographic shift from boomers to young millennial families.”  
- Resident, English-speaking group

[Marin] “I've heard of Zero Waste Marin, but I don't know anything about them.”  
- Resident, Spanish-speaking group

[Spanish ad] “It's funny but also boring. It doesn't motivate me to compost. It's sad and I feel bad for the avocado.”  
- Resident, Spanish-speaking group

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- Resident, Spanish-speaking group

[Spanish ad] “It's funny but also boring. It doesn't motivate me to compost. It's sad and I feel bad for the avocado.”  
- Resident, Spanish speaking group

# Recommendations



# Recommendations

- Awareness and education around Zero Waste Marin’s goal of reducing waste needs to be refined with more outreach.
- Communications should show definite impact, as some were skeptical about how it mattered or affected the environment.
- Content should focus on key motivators around reducing materials going to the landfill and educating around how to do so.
- Educational efforts should address knowledge gaps in composting and hazardous waste disposal, not recycling
- The key theme should focus on positive collective behavior that impacts all the residents of Marin.
- *For example:*
  - *“As a county, we saved X pounds of waste going to the landfill.”*
  - *“Putting waste in your green bin turns into compost for farmers in West Marin.”*
  - *“The place for household waste: one location for all of Marin.*
  - *“Marin’s coffee cup challenge of 2027: ”*
- Needs for English and Spanish speakers were similar:
  - Messaging needs to be simple and supported by facts.
  - The tone should be simple, educational, and inspirational.
  - It should highlight how being environmentally friendly helps the community.
- Spanish speaking groups also preferred communications that included:
  - A community approach (e.g., We are helping the community).
  - An understanding of multi-generational homes, which are more prevalent.
  - Advertising that has all aspects that can be localized (i.e., wordplay that fully translates).

Findings

# Attitudes and Behaviors

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# In the focus groups, residents appreciated Marin's proximity to nature, community, and healthy living.

Some participants were skeptical about how their efforts would pay off.

- In the English-speaking focus group, residents were more likely to speak about the positive lifestyle aspects of Marin (e.g., proximity to the outdoors, hiking, music) than Spanish speaking residents.
  - Spanish speaking residents were more likely to focus on socializing and spending time with family and friends, reflective of Hispanic culture.
- English speaking residents were more likely to have positive attitudes, behaviors, motivations, and education around properly disposing of household waste responsibly.
  - Most knew about the center in San Rafael to recycle paint and other household items.
  - There was confusion around what does and doesn't not go into compost bins.
  - All were surprised that composting is a law, and that generated some fear.
  - Others had concerns about the results of their efforts, questioning if it was "paying off."
- Among Spanish speaking residents, the environment and sustainability were not top of mind at all.
  - Many did not understand the benefits of recycling or composting.
  - They also had concerns about the smell and messiness (reflecting cultural themes).
  - They were comfortable throwing away batteries in the garbage.
  - They noted that they would be more likely to do this if their friends and neighbors were engaging, reflective of their greater cultural focus on community.

"They're very into recycling here and keeping everything clean."  
- Resident, English-speaking group

"Maybe more transparency into Marin's recycling capabilities and some reassurance that everything that I do on my end will pay off."  
- Resident, English-speaking group

"Why do I have to do it [compost/recycle] when it is expensive and it may not be worth it?"  
- Resident, Spanish-speaking group

"[Composting is the law?] Am I gonna go to jail for this?"  
- Resident, English-speaking group

# Organic survey participants were more likely to be enthusiastic about key attitudes about life in Marin.

83% of Organic participants found being environmentally conscious “very important” vs. 45% of Panel.  
*This is a statistically significant difference.*

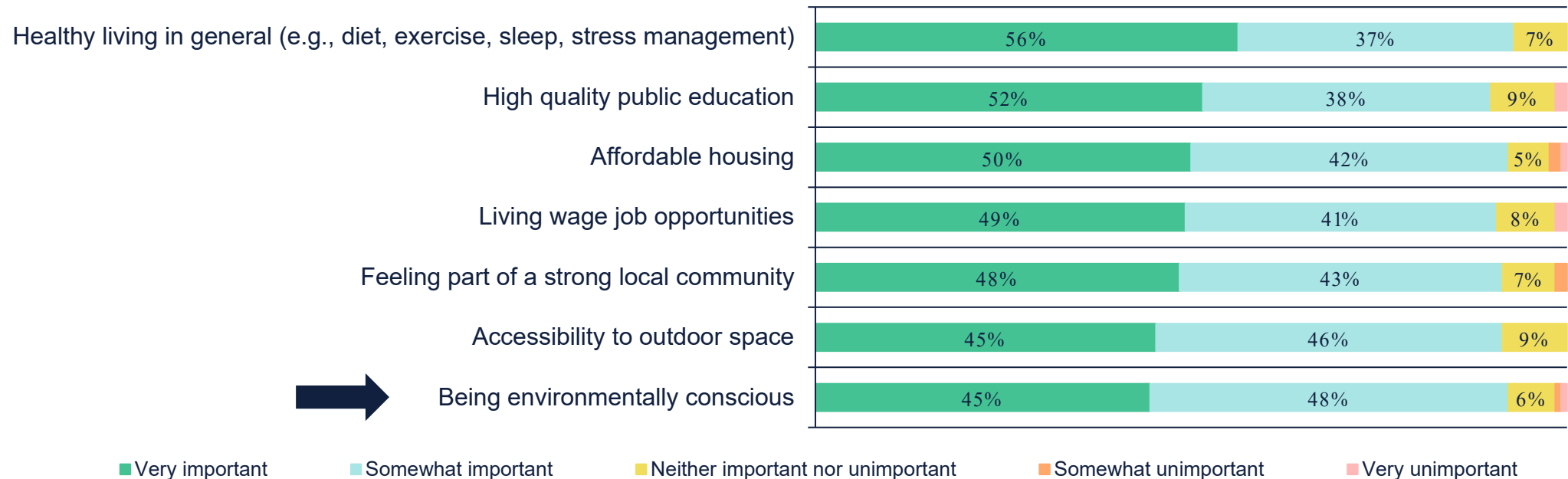
## Agreement about Living in Marin–Organic



# Healthy living, education, and housing was most important for Panel participants.

45% found it “very important” and 93% in total found it important.  
*(Top box comparisons are within the margin of error.)*

## Agreement about Living in Marin–Panel



# Almost all Panel participants wanted to reduce waste, but many cited the difficulty.

46% strongly agree and 90% agree that they want to learn more about having to reduce waste. 41% strongly agree that they want to, but it's difficult, with 87% agreeing.

## Environmental Attitudes—Panel

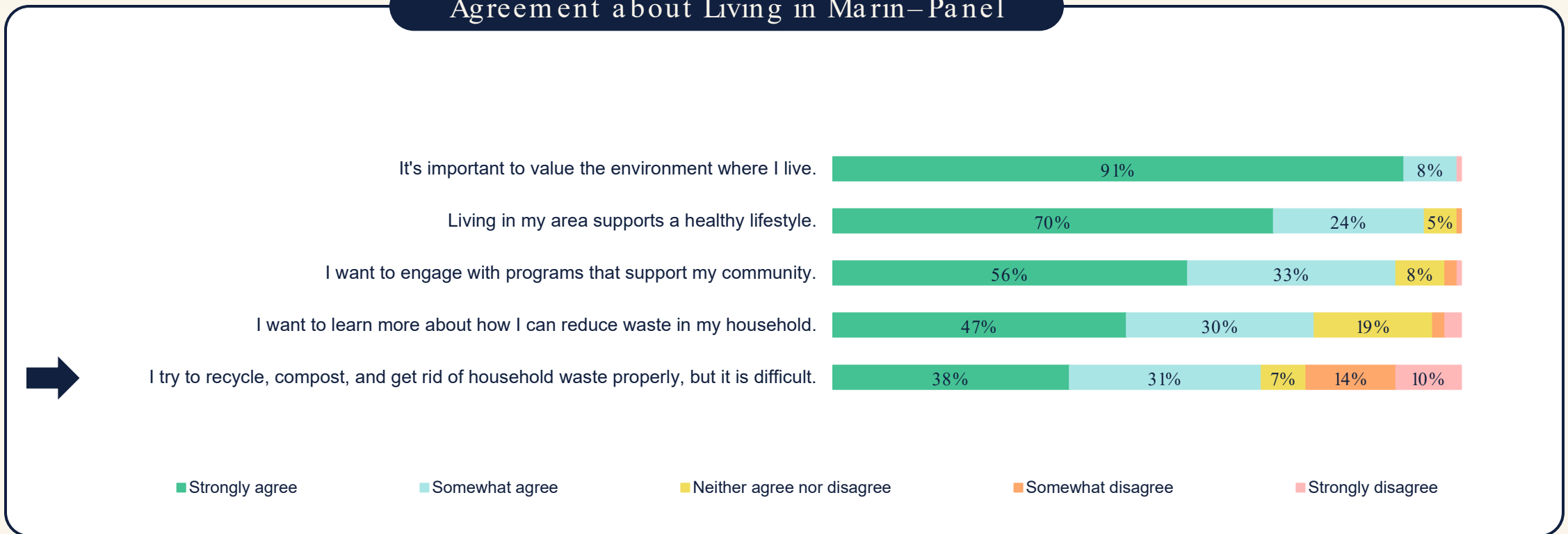


# Organic participants had similar attitudes about learning about waste and noting its difficulty.

47% strongly agree and 77% agree that they want to learn more about having to reduce waste. 38% strongly agree that they want to, but it's difficult, with 69% agreeing.

*Comparisons with the panel audience are within the margin of error.*

## Agreement about Living in Marin—Panel



Findings

# Household Waste Disposal Attitudes and Behaviors

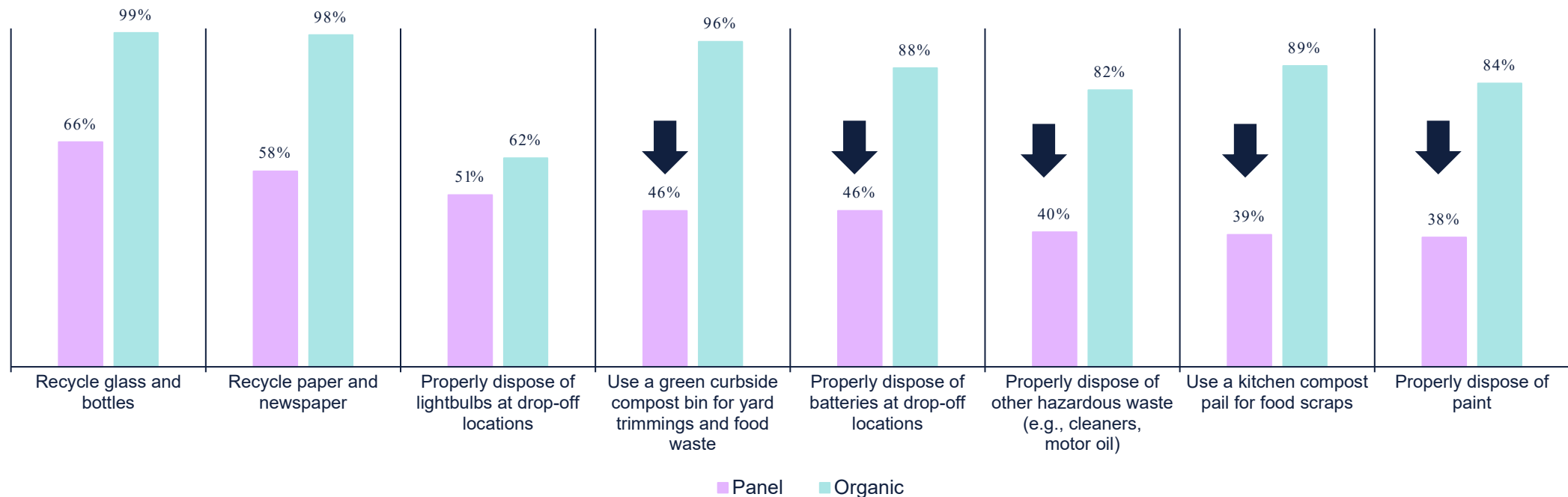
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# About 60% of Panel and almost 100% of Organic audiences recycle glass, bottles, paper, and newspaper.

Less than of Panel participants used a green bin, composted, or disposed of most hazardous waste.

## Behaviors as it relates to recycling, composting and disposing of household waste



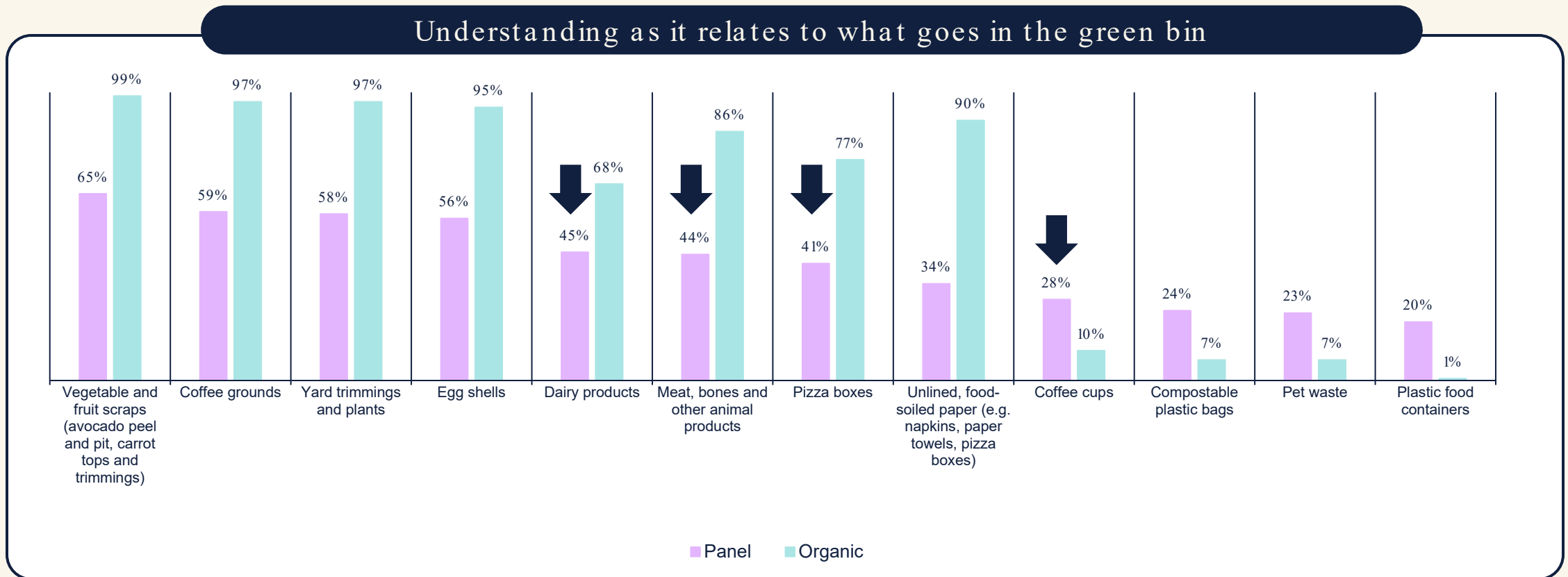
Q23. As it relates to the following, which do you typically do? (Please be honest!)

Panel: N=128 (margin of error= +/- 10%), Organic: N=154 (margin of error= +/- 8%).

Note: This question is slightly similar to Q25, which asks "In general, how often do you use your kitchen compost pail to collect food scraps?"

# In focus groups and in the survey, residents were often confused about what goes in the green bin.

Aspects such as dairy, meat, pizza boxes, food-soiled paper and coffee cups were often most misunderstood.

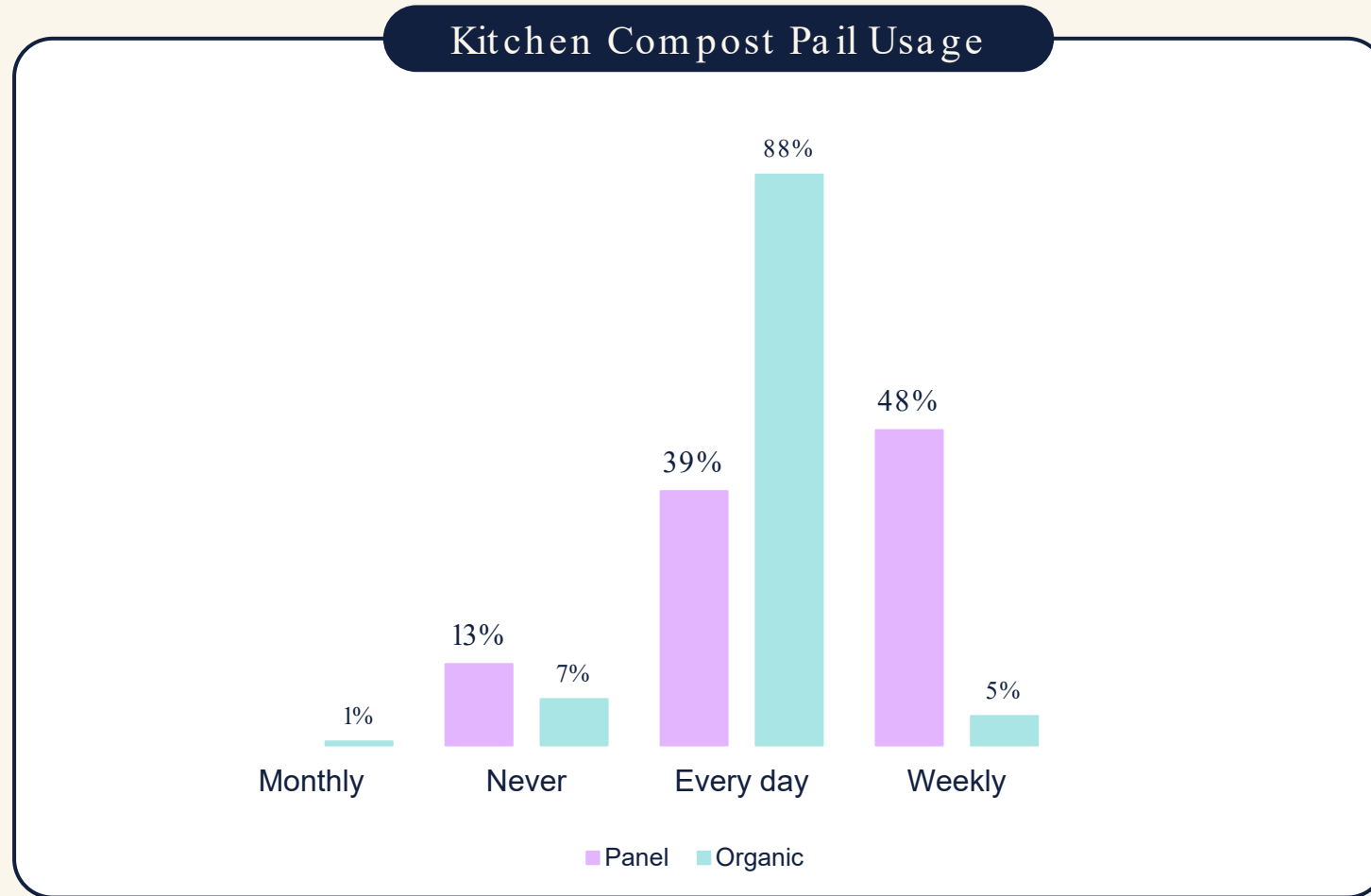


Q24. From your understanding, what items are accepted in the green curbside compost bin? (Please be honest!)?

Panel: N=128 (margin of error= +/-9%), Organic: N=154 (margin of error= +/-8%).

Note: This question is slightly similar to Q23, which asks "In general, how often do you use your kitchen compost pail to collect food scraps?"

Over 85% of Panel and Organic survey participants note that they use their kitchen compost bin weekly.



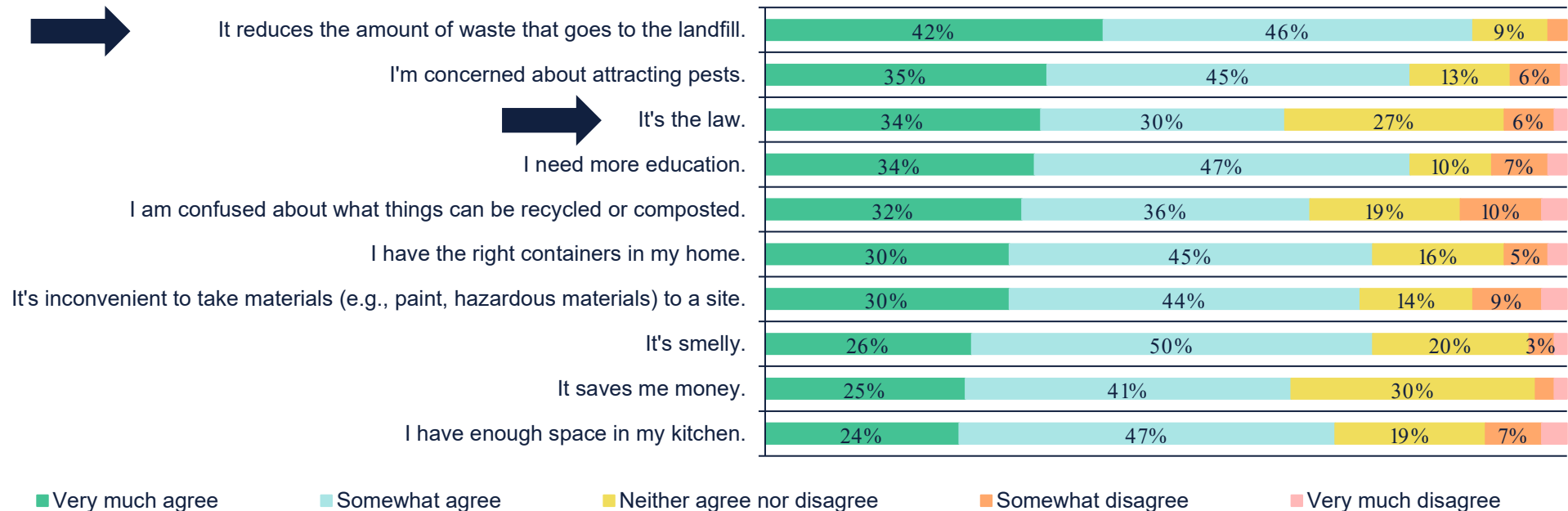
Q25. In general, how often do you use your kitchen compost pail to collect food scraps?  
Panel: N=128 (margin of error= +/-9%), Organic: N=154 (margin of error= +/-8%).

Note: This data is different from Q23, which asks “Q23. As it relates to the following, which do you typically do? (Please be honest!)? [Use a kitchen compost pail for food scraps.]”

# Within the Panel audience, waste was a key reason to recycle (86%), followed by recognizing it's the law (64%).

Many had concerns about pests, which was a theme more evident in the Spanish-speaking groups. About 70% also cited barriers such as needing more education and having containers.

## Opportunities and Barriers for Disposal of Household Waste—Panel

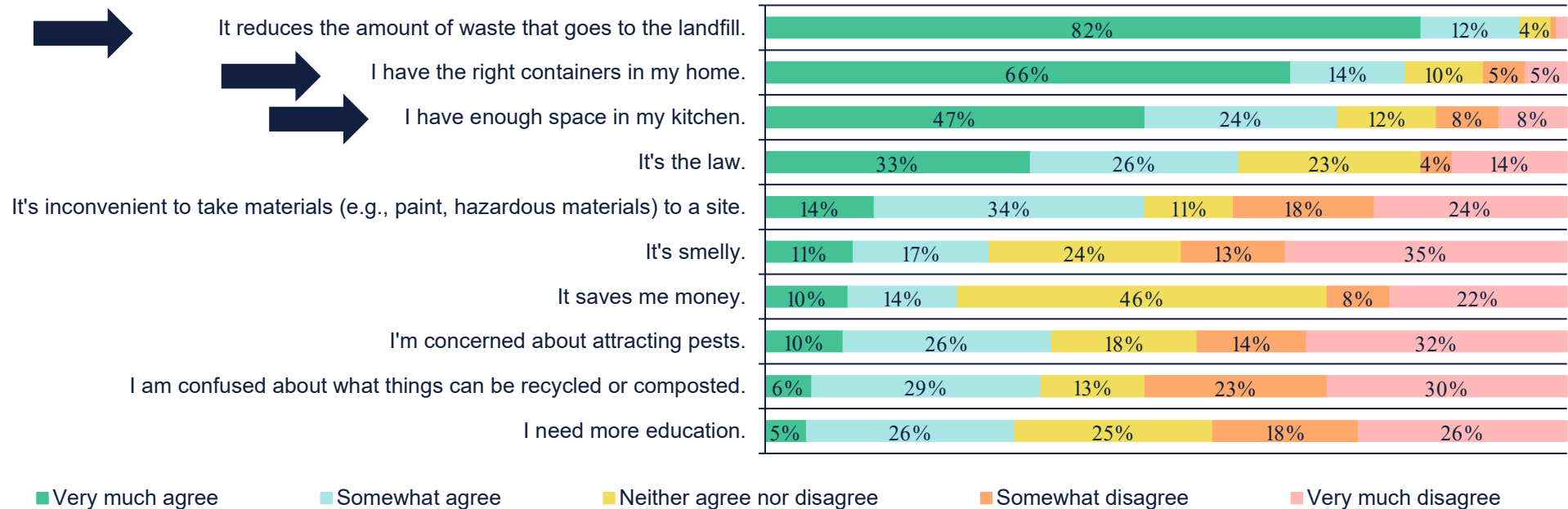


Q26. The following are reasons why you might or might not recycle, compost, and/or properly dispose of household waste. Please note your agreement with the following.  
 Panel N=128 (margin of error= +/- 10%).  
 Percentages 2% or under not labeled for readability.

# The Organic audience was more likely to have the right containers and space in their kitchen as 81% lived in a single-family home.

Compared to the Panel audience, they were statistically less likely to cite education, inconvenience, or attracting pests.

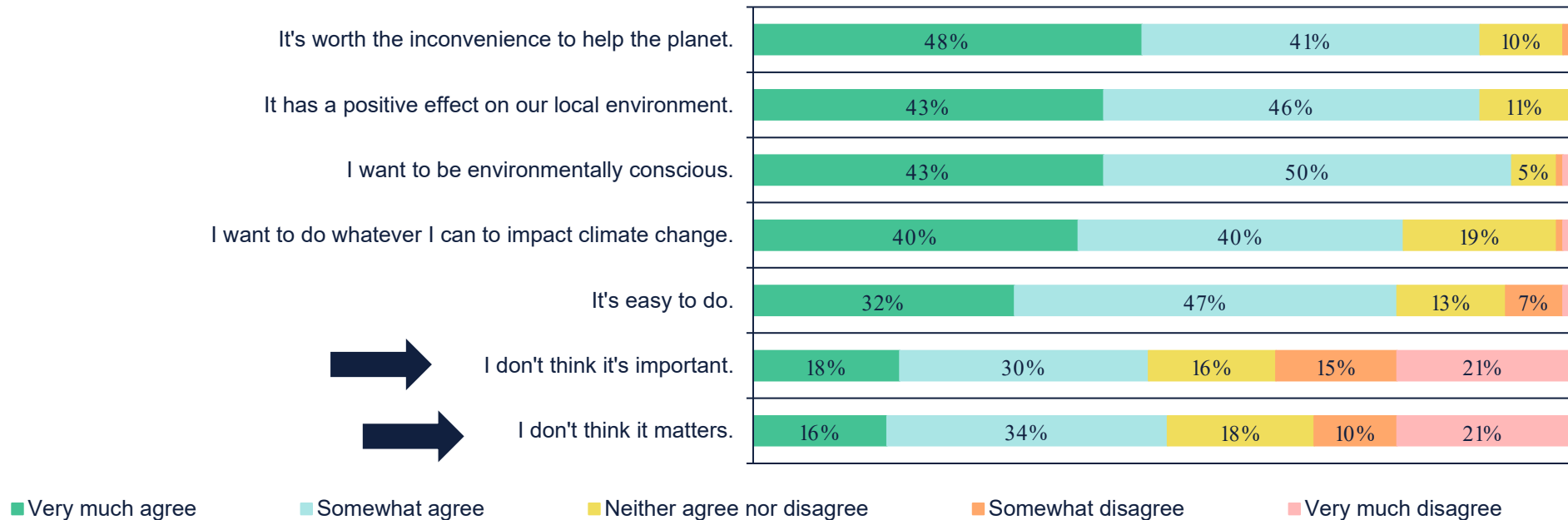
## Opportunities and Barriers for Disposal of Household Waste—Organic



# Panel attitudes were generally positive about disposal, but about a third didn't think it was important or mattered.

These attitudes, as well as those about supporting their community and environment were reiterated in the focus groups, as many were unsure about the impact.

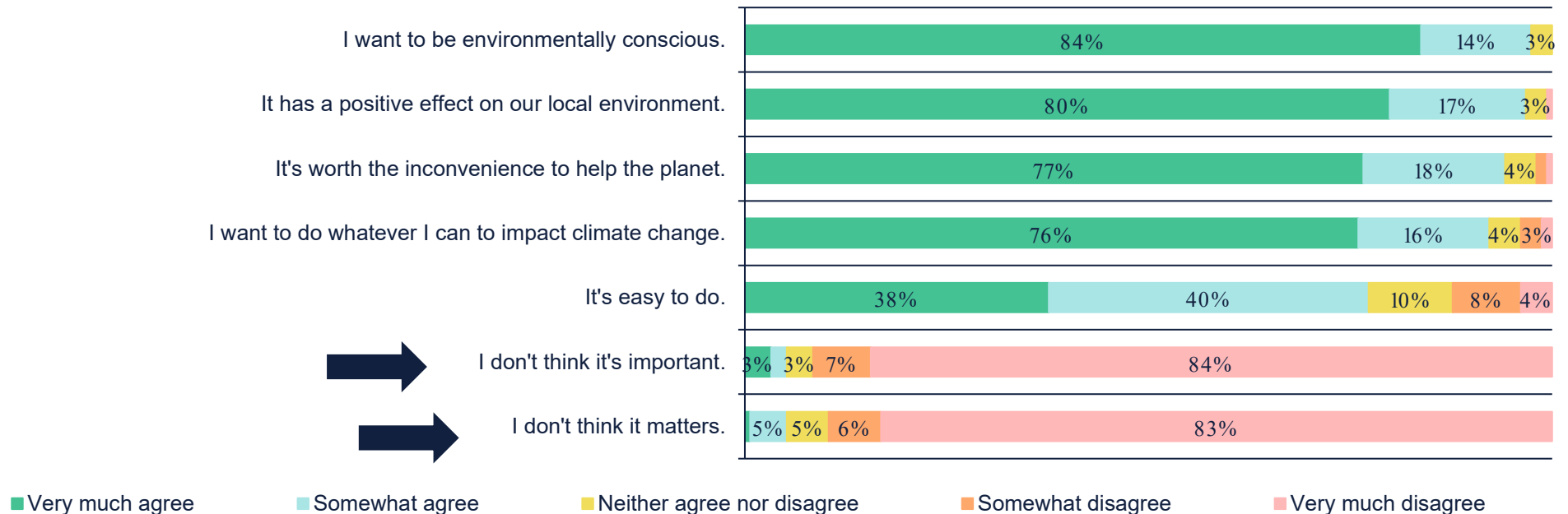
## Attitudes about Disposing of Household Waste—Panel



# Organic survey participants were statistically more likely hold environmentally conscious attitudes.

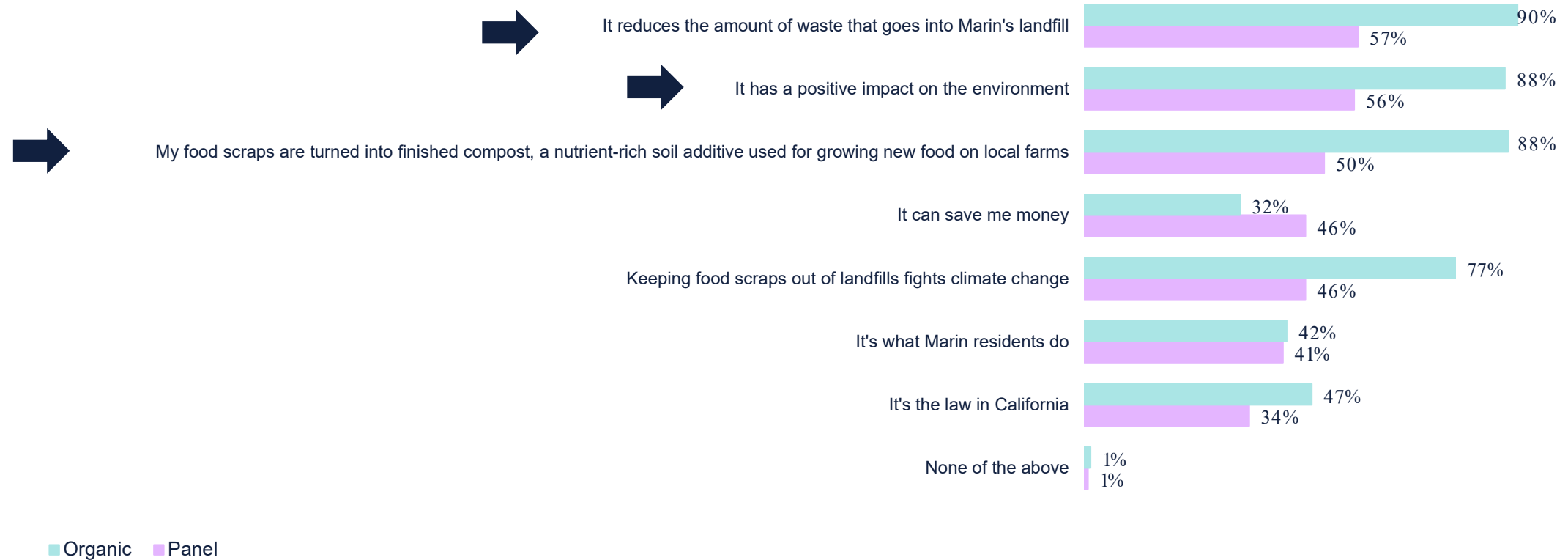
Over 90% thought that it was important and it mattered.

## Attitudes Around Disposing of Household Waste—Organic



# Key motivations for using the green bin included reducing waste going to landfill, the environment, and compost for local farms.

## Motivation for Using Green Curbside Bin



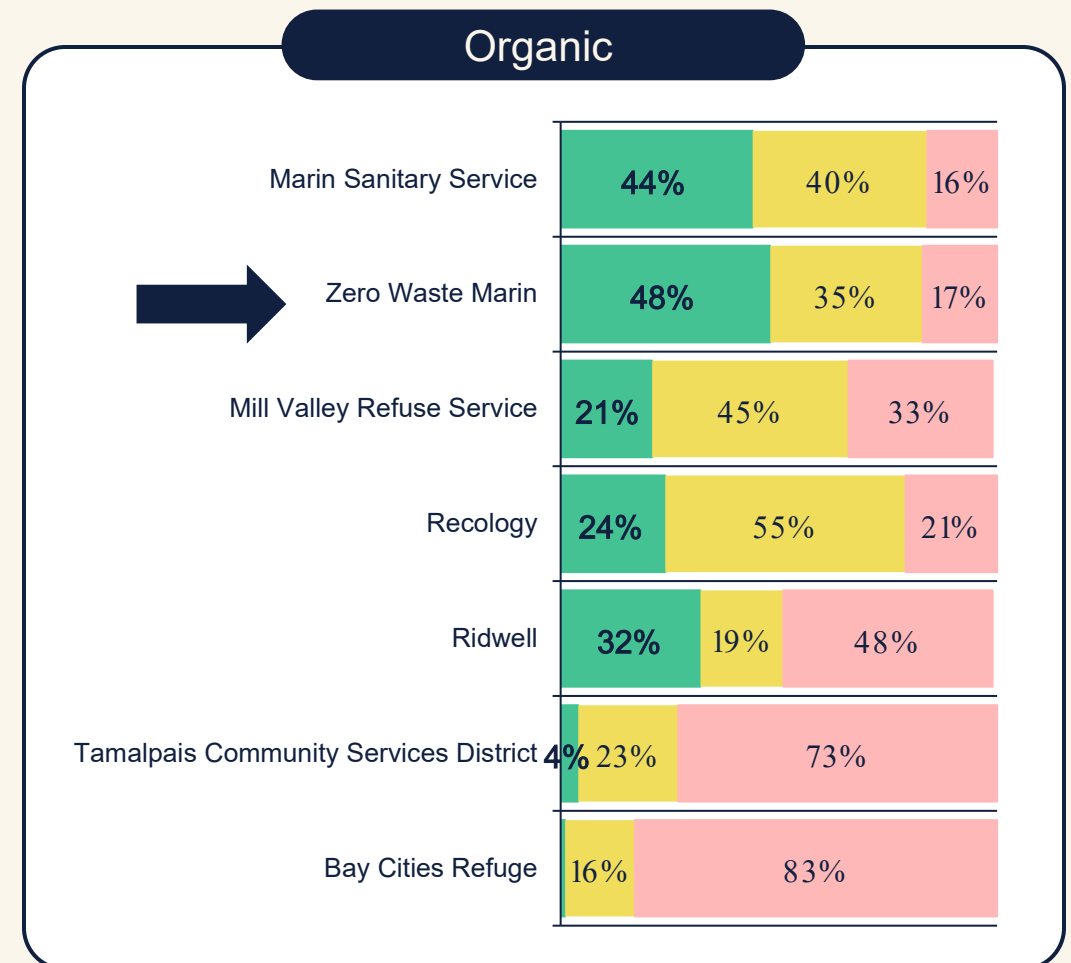
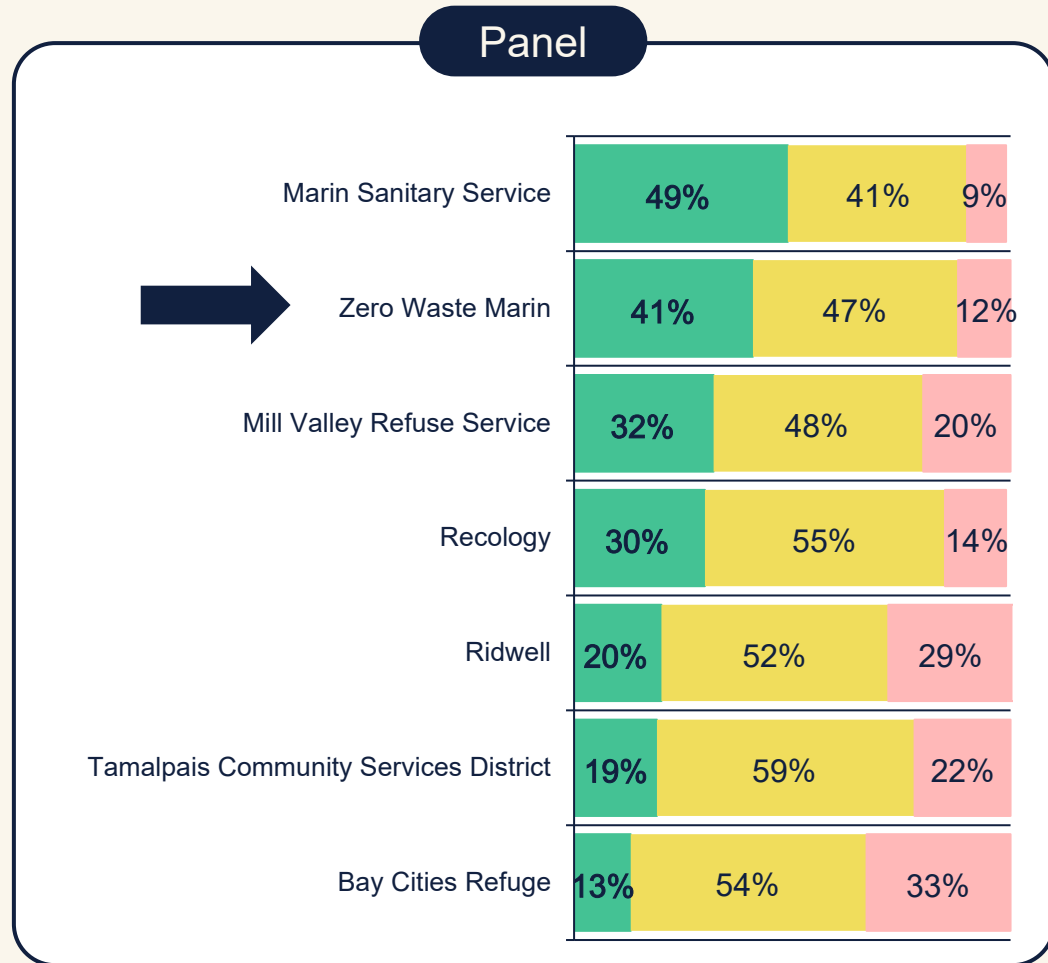
Findings

# Brand Attitudes, Affinity, and Perception

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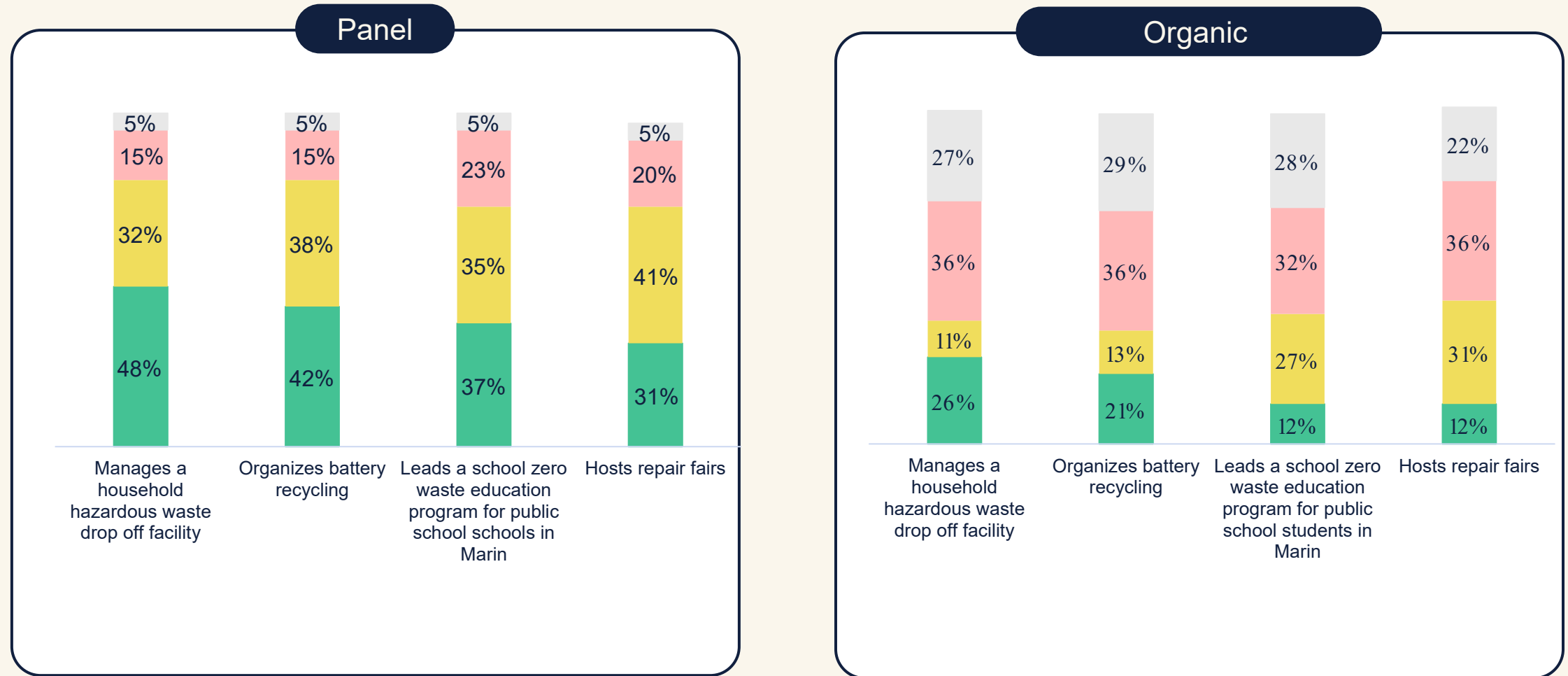
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# 41% of Panel and 48% of Organic survey participants have seen Zero Waste Marin advertising in the last six months.



● Aware and have seen advertising in last six months
 ● Aware and have not seen advertising in last six months
 ● Not aware

# 48% of Panel and 26% of Organic survey participants are aware of ZWM managing a household drop off facility.



● Aware and have a household member participate 
 ● Aware and have not had a household member participate 
 ● Not aware 
 ● Don't know

In the survey, about two thirds of each audience noted they are somewhat knowledgeable about Zero Waste Marin.

### Knowledge of Zero Waste Marin



In asked in an open -ended question, survey participants had a general knowledge of Zero Waste Marin.

## Knowledge of Zero Waste Marin

### Panel

“An organization attempting to encourage reuse and avoiding landfills.”

“Zero Waste Marin is the long- range planning office that looks years ahead to figure out how our county can create less garbage overall.”

“Hands on demonstrations for our children about waste pathways are tied to their educational mission.”

### Organic

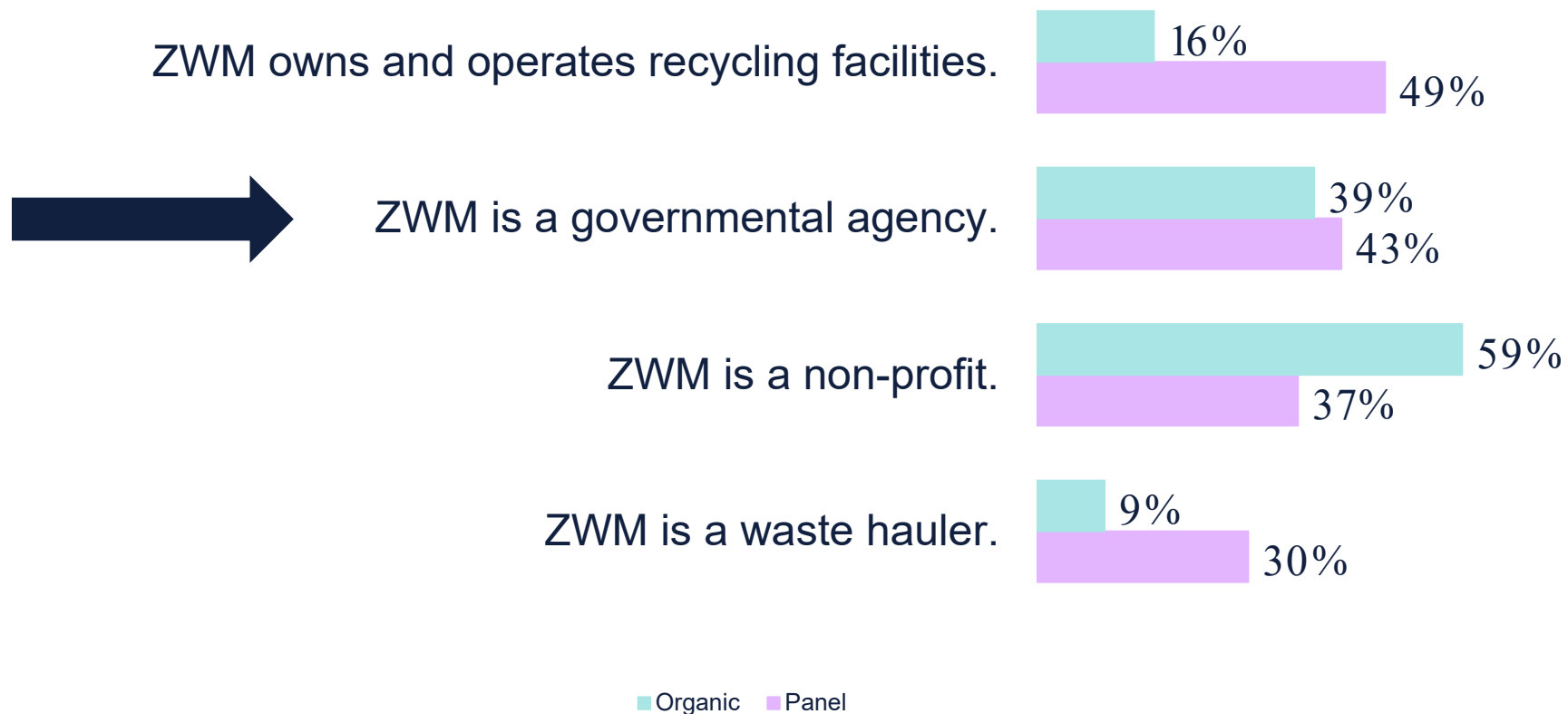
“County organization that promotes and supports recycling and other waste management activities in Marin County.”

“I would guess it means Zero Waste. Nothing ends up polluting our world.”

“An umbrella organization that supports efforts to divert refuse from the Marin landfill.”

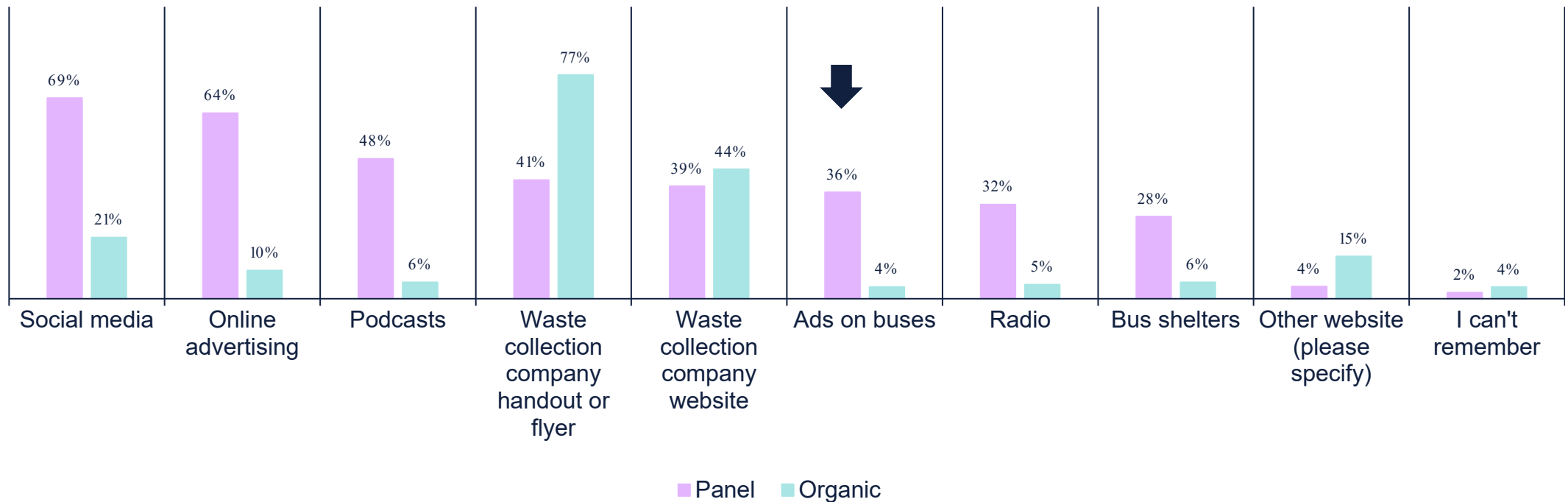
# About 40% of both audiences know that Zero Waste Marin is a governmental agency.

## Knowledge of Zero Waste Marin



# Awareness differed across Panel and Organic survey participants.

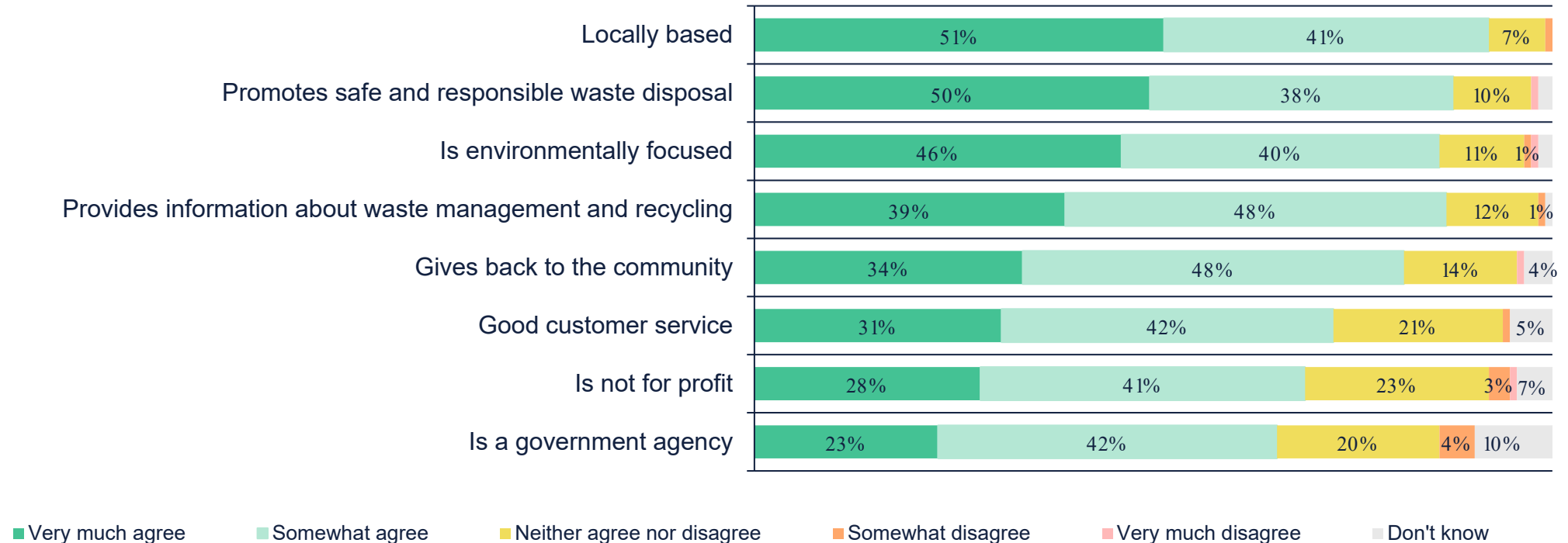
## Awareness as it relates to recycling, composting and disposing of household waste



# Most Panel participants were generally knowledgeable about Zero Waste Marin.

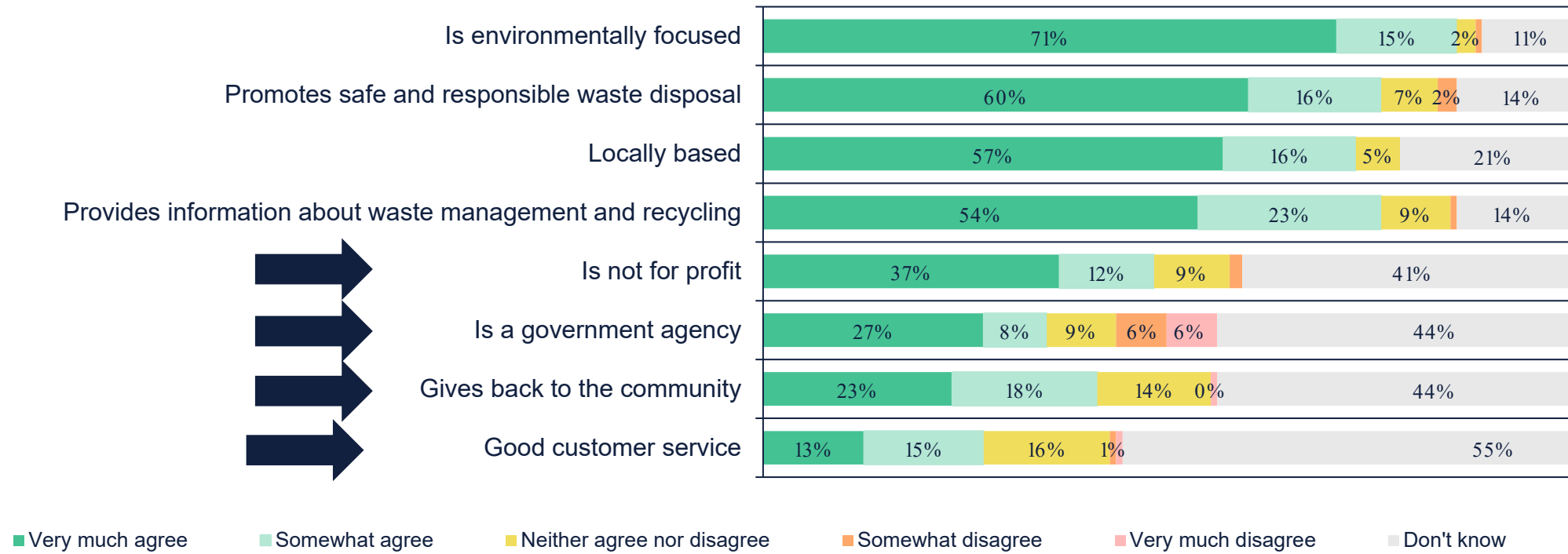
Reflecting the Organic audience, they were less unsure about it being not for profit or being a government agency.

## ZWM Perceptions—Panel



# The Organic survey audience was less likely to be knowledgeable about certain aspects of Zero Waste Marin.

## ZWM Perceptions—Organic



Findings

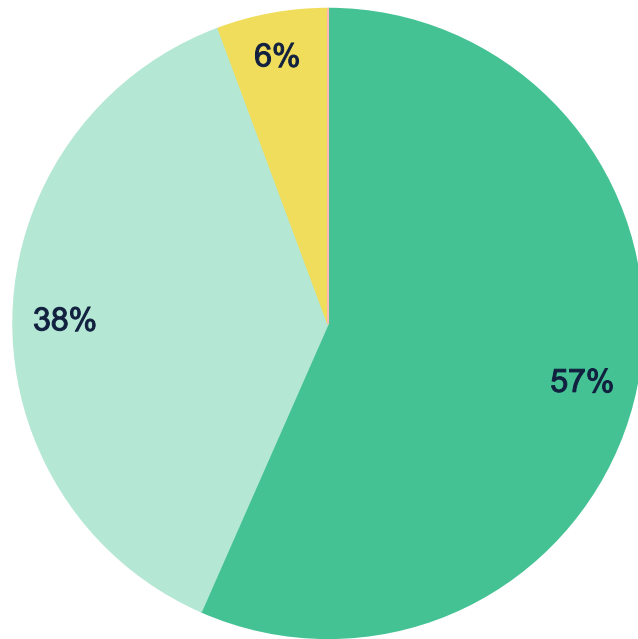
# Zero Waste Marin Advertising

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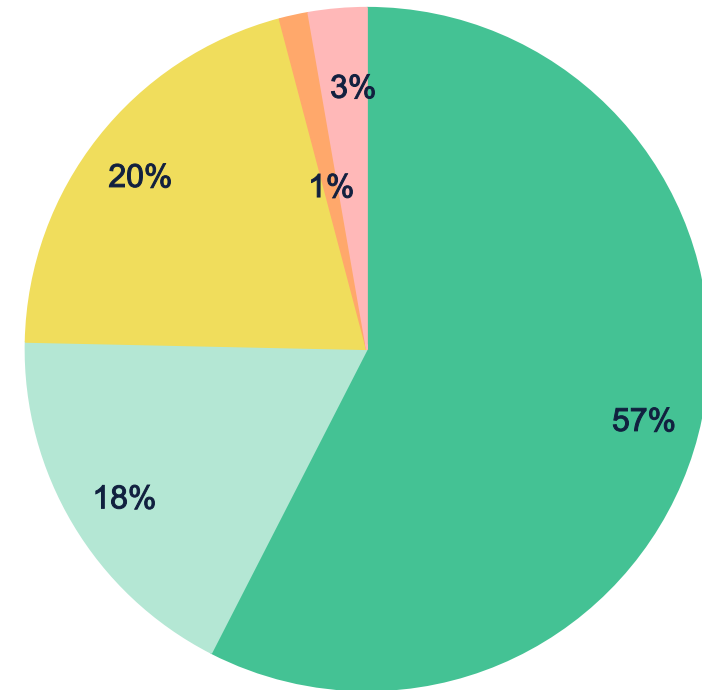
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94% of Panel participants found the advertising favorable.  
74% of Organic participants found the advertising favorable.

Favorability of Advertising – Panel



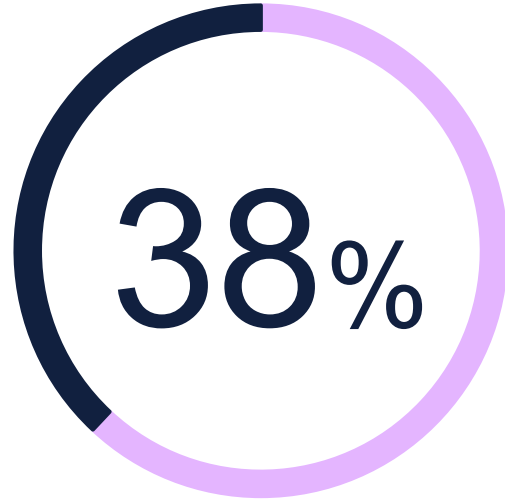
Favorability of Advertising – Organic



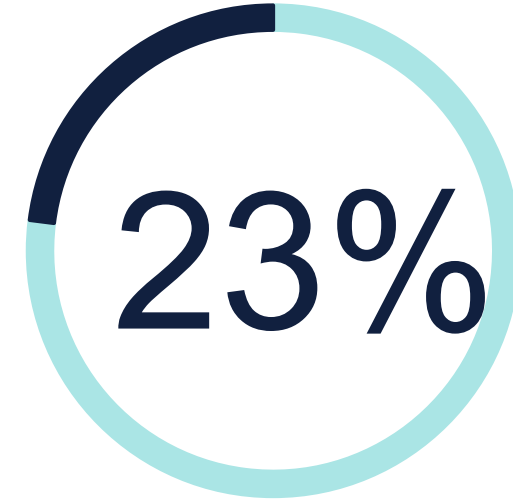
Very favorable   Somewhat favorable   Neither favorable nor unfavorable   Somewhat unfavorable   Very unfavorable

**38%** of Panel participants and **23%** of Organic participants noted that they saw this advertising before.

38% of Panel participants and 21% of Organic participants said they learned something from it.



Panel



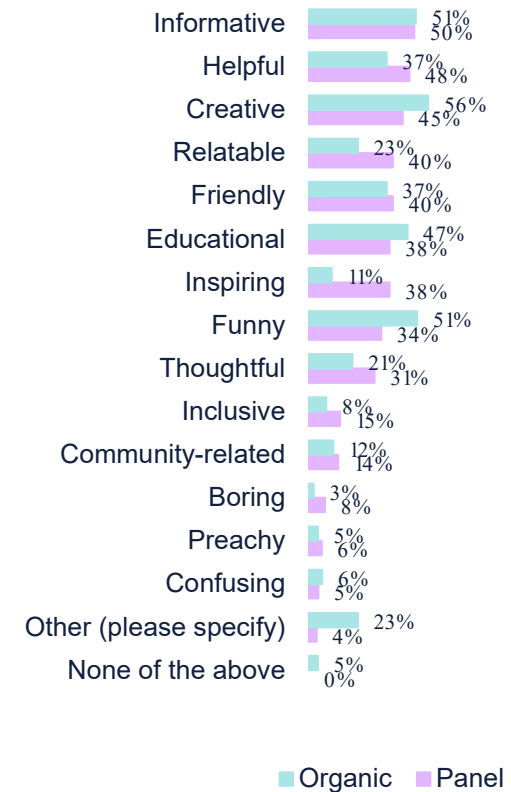
Organic





About half of both audiences considered the two creatives informative, helpful, and creative.

Advertising Words or Phrases



Those in the English and Spanish -speaking groups felt the website was a little bland and wordy.

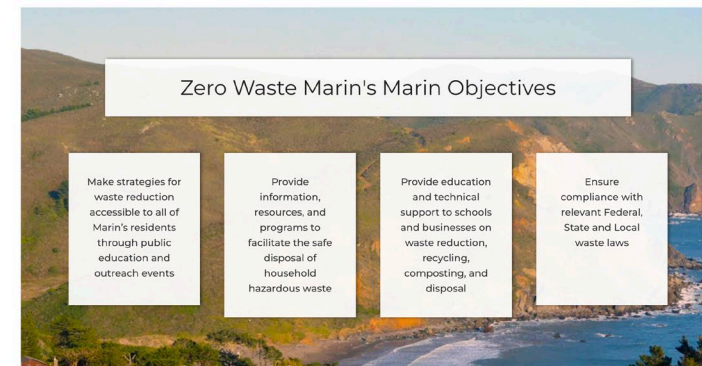
## Focus Group Stimuli



## Who We Are

Zero Waste Marin is the informal name for the Marin County Hazardous and Solid Waste Joint Powers Authority (JPA), which represents Marin's 11 cities and towns and the unincorporated County of Marin on issues related to waste reduction and management. The JPA Board is comprised of city and town representatives from Belvedere, Corte Madera, Fairfax, Larkspur, Mill Valley, Novato, Ross, San Anselmo, San Rafael, Sausalito, Tiburon and the County of Marin.

Our mission is to protect natural resources by promoting source reduction of waste through reuse, repair, and more mindful purchasing. To make recycling and composting easy, we offer a variety of programs including: the Household Hazardous Waste Program, the Zero Waste Schools Program, and public outreach and education programs. These programs align with County-wide goals to act on climate change and promote healthy, safe, and sustainable communities.



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Some in the Spanish speaking groups felt the video was sad and wished the wordplay was translated into Spanish.

### Spanish Speaking Stimuli



Se Una Estrella de Rock del Compostaje

"I found it funny but also boring. It doesn't motivate me to compost. I would just scroll. It's sad like I have to feel bad for the avocado. Nah."  
- Resident, Spanish-speaking group



When reading about composting, many were surprised that it was a law, which incited some fear.

Focus group stimuli



### Composting in Marin

BE A COMPOSTING ROCK STAR. PUT FOOD SCRAPS IN THE GREEN BIN.

Composting our food scraps, yard waste, and unlined soiled paper has numerous important benefits: it reduces methane emissions from landfills, prevents unnecessary waste from taking up space in landfills, helps soil retain moisture, and returns nutrients to the soil without the use of chemical fertilizers. Not only is compost an incredibly important climate action we can all take every day, it is now also **required by law in California to keep compostable material out of our landfills**.

Zero Waste Marin understands that diverting green waste and food scraps at home isn't always intuitive. Some items are confusing, and each waste hauler in Marin County has their own rules for residential compost collection.

Review the FAQs below for helpful tips, resources, and a list of the most common items that belong in your compost cart.



### Compostaje en Marin

SEA UNA ESTRELLA DE ROCK DEL COMPOSTAJE. COLOQUE LOS RESTOS DE COMIDA EN EL CONTENEDOR VERDE.

Compostar nuestros restos de comida, desechos de jardín y papel sucio sin forro tiene numerosos beneficios importantes: reduce las emisiones de metano de los vertederos, evita que los residuos innecesarios ocupen espacio en ellos, ayuda a la tierra a retener la humedad y le devuelve nutrientes sin usar fertilizantes químicos. El compostaje no solo es una acción climática increíblemente importante que todos podemos tomar a diario, sino que ahora **la ley en California exige que no se acaben materiales compostables en los vertederos**.

Zero Waste Marin entiende que separar los residuos verdes y los restos de comida en casa no siempre es intuitivo. Algunos elementos son confusos, y cada empresa de recolección de residuos del condado de Marin tiene sus propias normas para la recolección de compost residencial.

Revise las preguntas frecuentes a continuación para obtener consejos útiles, recursos y una lista de los elementos más comunes que deben incluirse en su carrito de compost.

[Volver arriba](#)

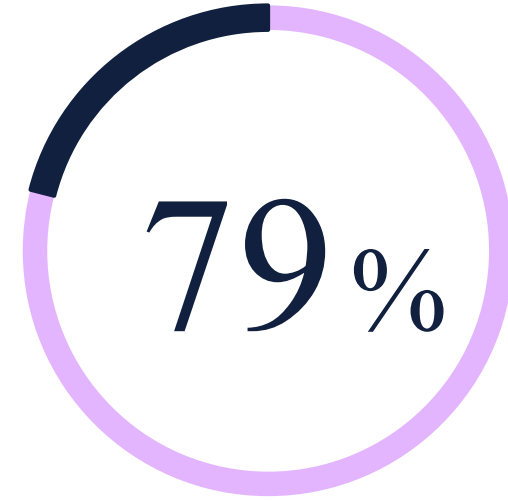
# Appendix



Overall, 78% have seen, heard, or read something as it relates to recycling, composting, or disposing of household waste in the last six months.



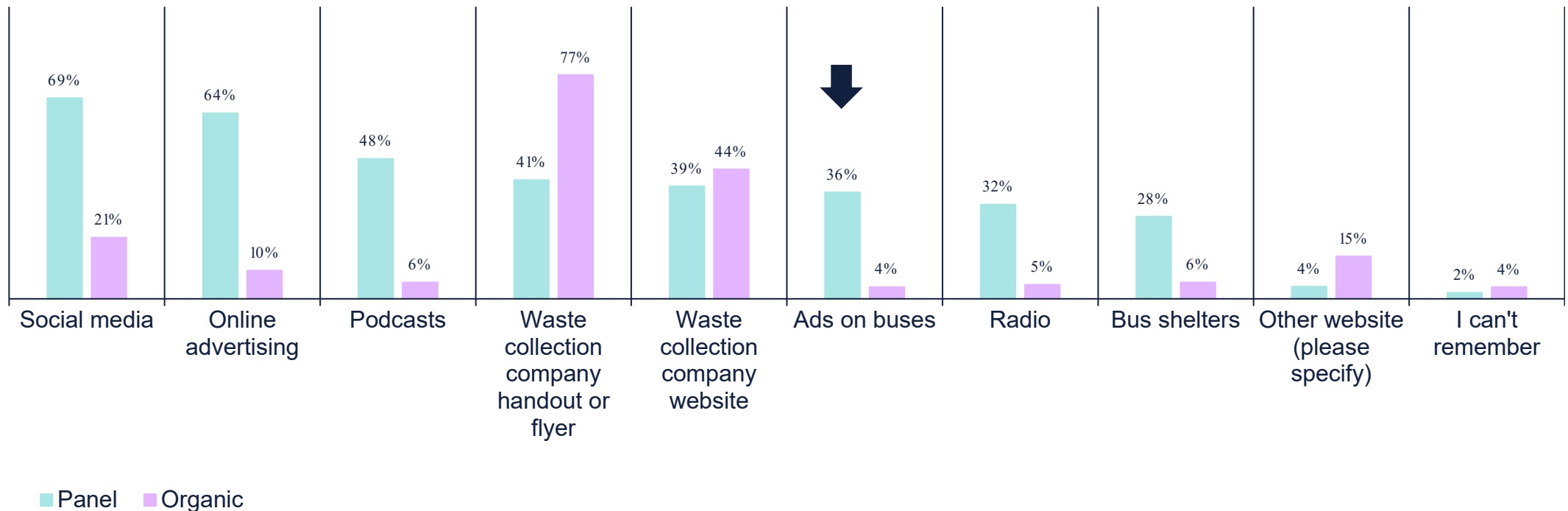
Panel



Organic

# Awareness differed across Panel and Organic survey participants.

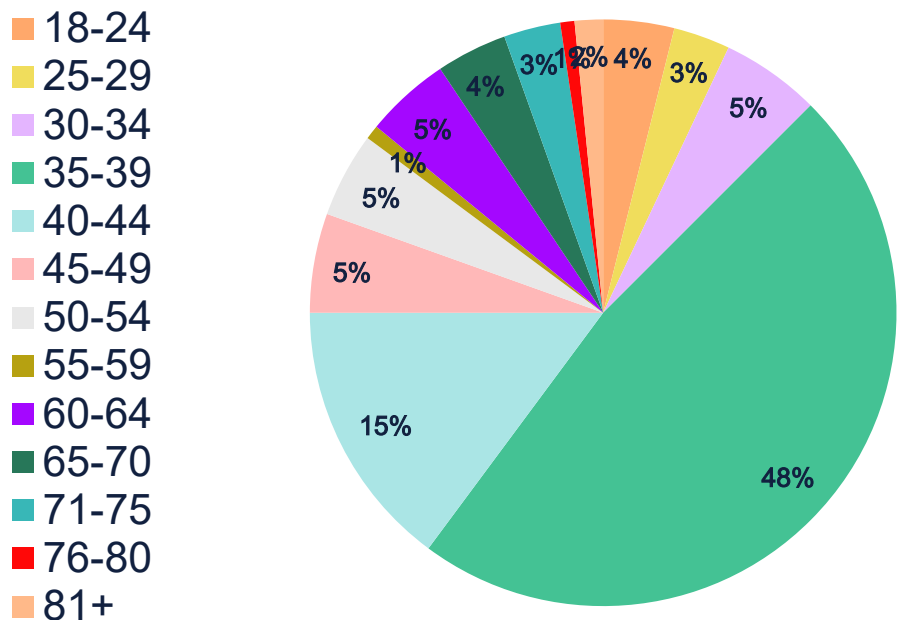
## Awareness as it relates to recycling, composting and disposing of household waste



The Organic audience had more of an age distribution.  
 There was an approximately 50/50 gender split.

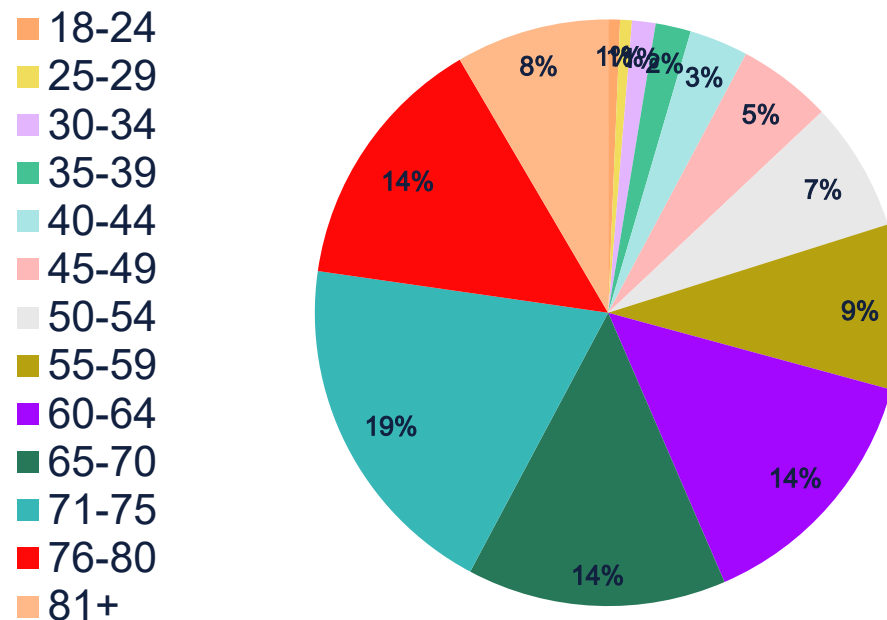
Age-Panel

Median age= 38



Age-Organic

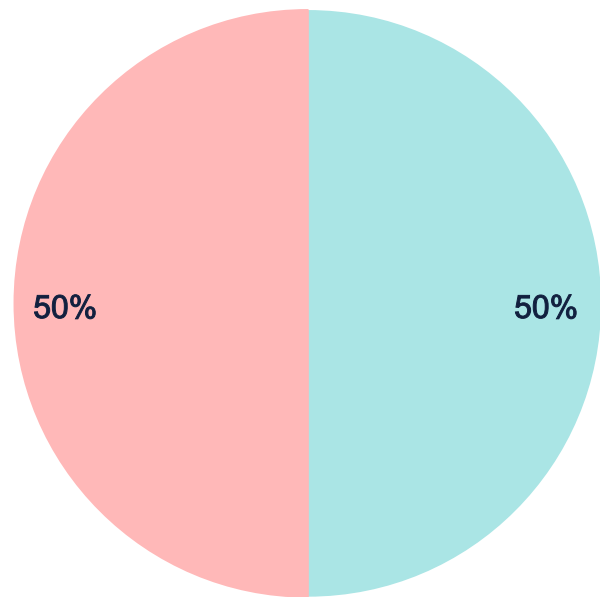
Median age= 68



The Panel audience had a 50/50 gender split.  
The Organic audience was 74% female.

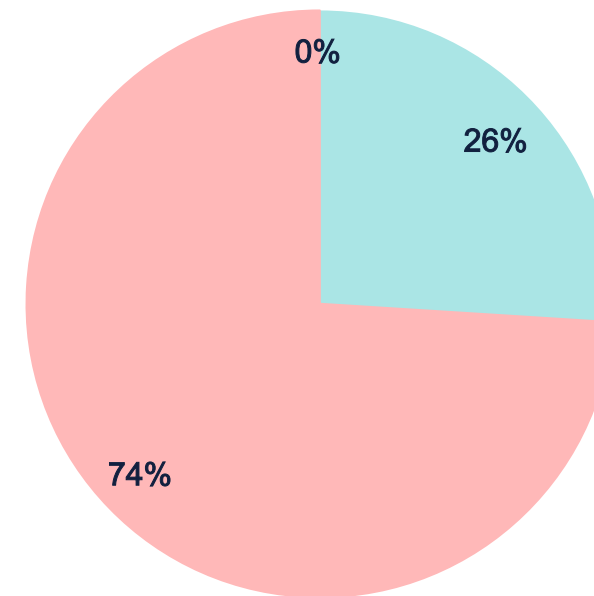
Gender-Panel

- Male
- Female
- Gender fluid or non-binary
- Prefer to describe
- Prefer not to answer



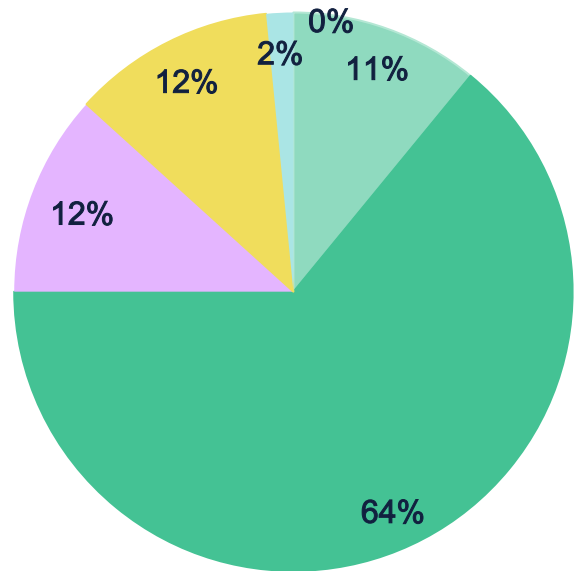
Gender-Organic

- Male
- Female
- Gender fluid or non-binary
- Prefer to describe
- Prefer not to answer



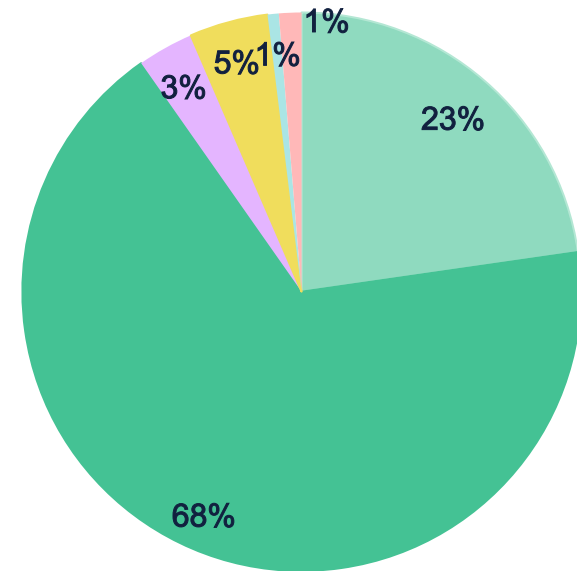
64% of Panel survey participants own a home.  
 68% of Organic survey participants own a home.

Living situation - Panel



- Own a home and live alone
- Own a home and live with others
- Rent a home, condo, or apartment and live alone
- Rent a home, condo, or apartment and live with others
- Live with others but do not pay rent or a mortgage
- Other (please specify)

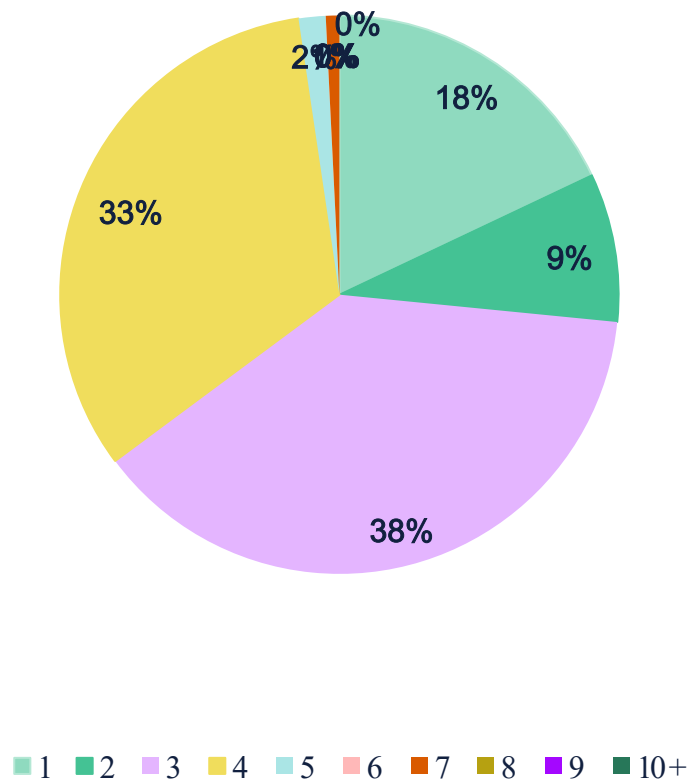
Living Situation - Organic



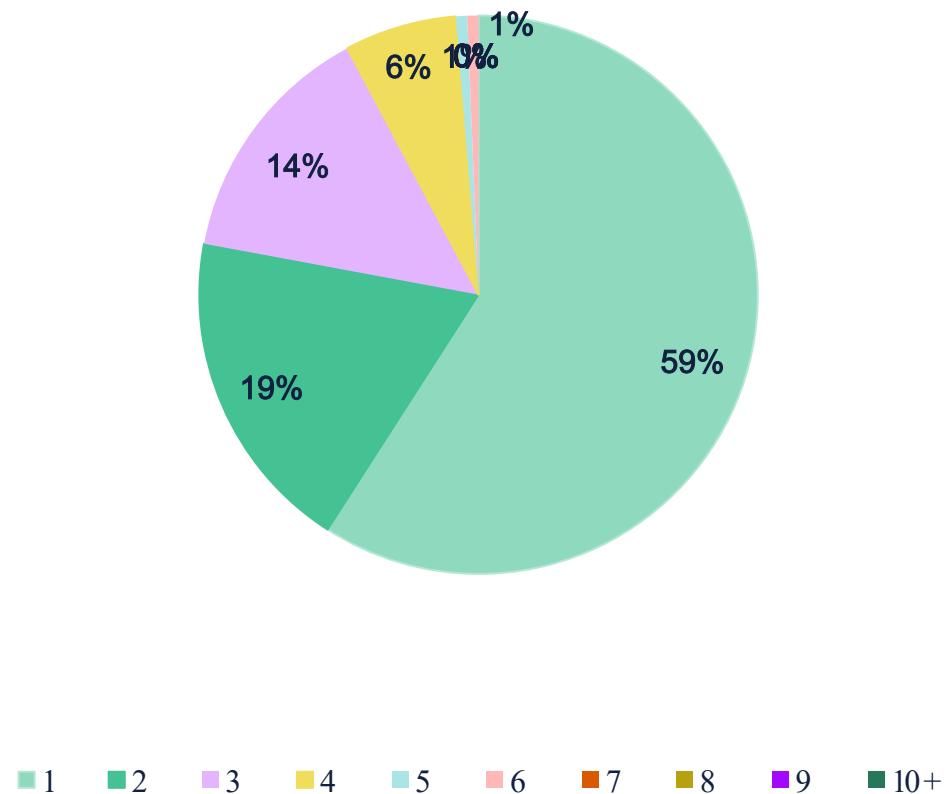
- Own a home and live alone
- Own a home and live with others
- Rent a home, condo, or apartment and live alone
- Rent a home, condo, or apartment and live with others
- Live with others but do not pay rent or a mortgage
- Other (please specify)

Panel survey are more likely to live with people.  
 Organic audience is more likely to live alone.

Living situation-Panel

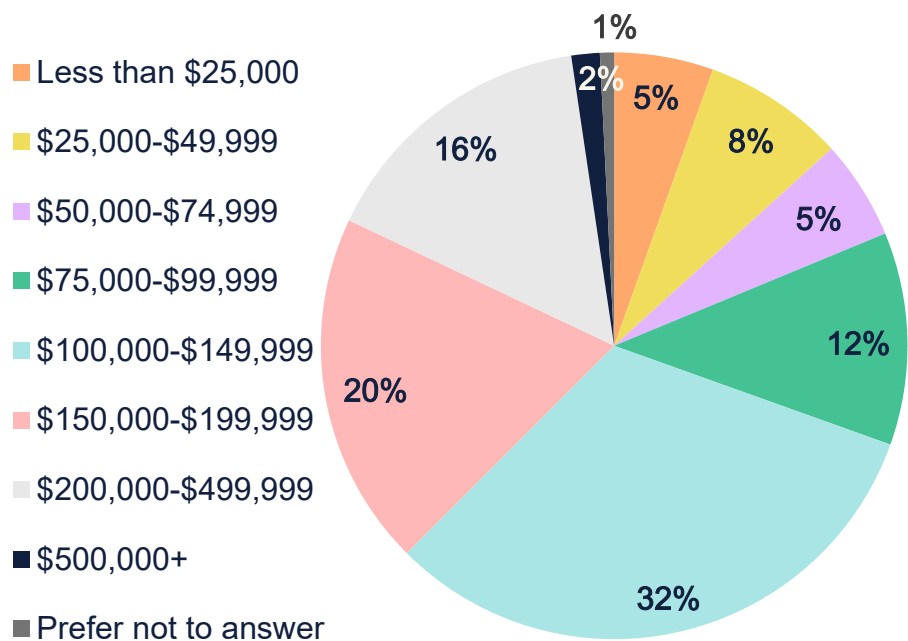


Living Situation-Organic

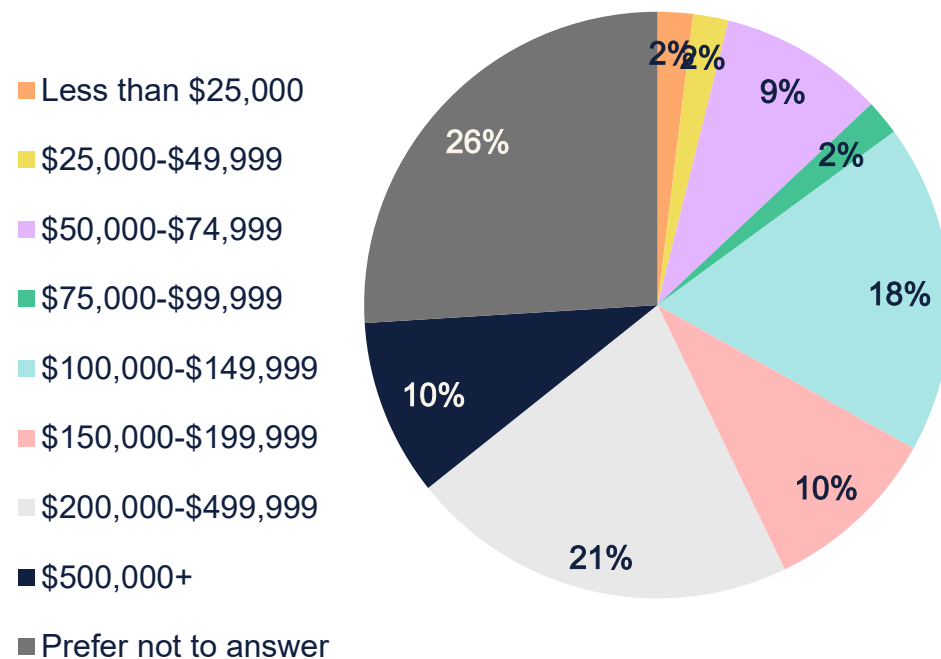


# The Organic audience had a higher percentage of participants who did not want to share HHI.

HHI-Panel

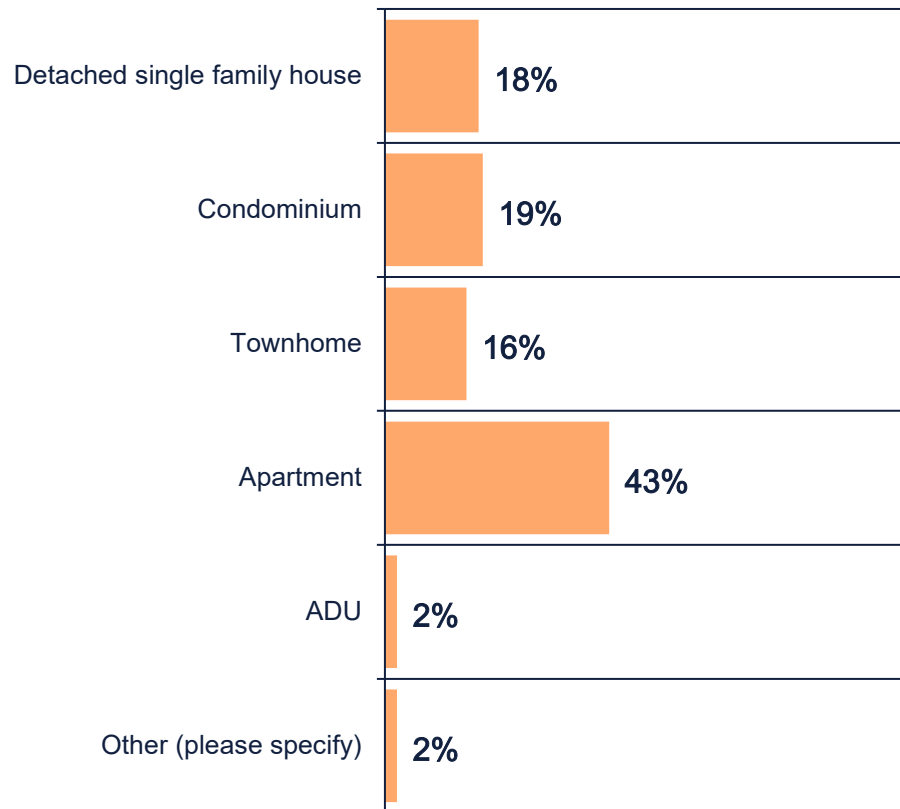


HHI-Organic

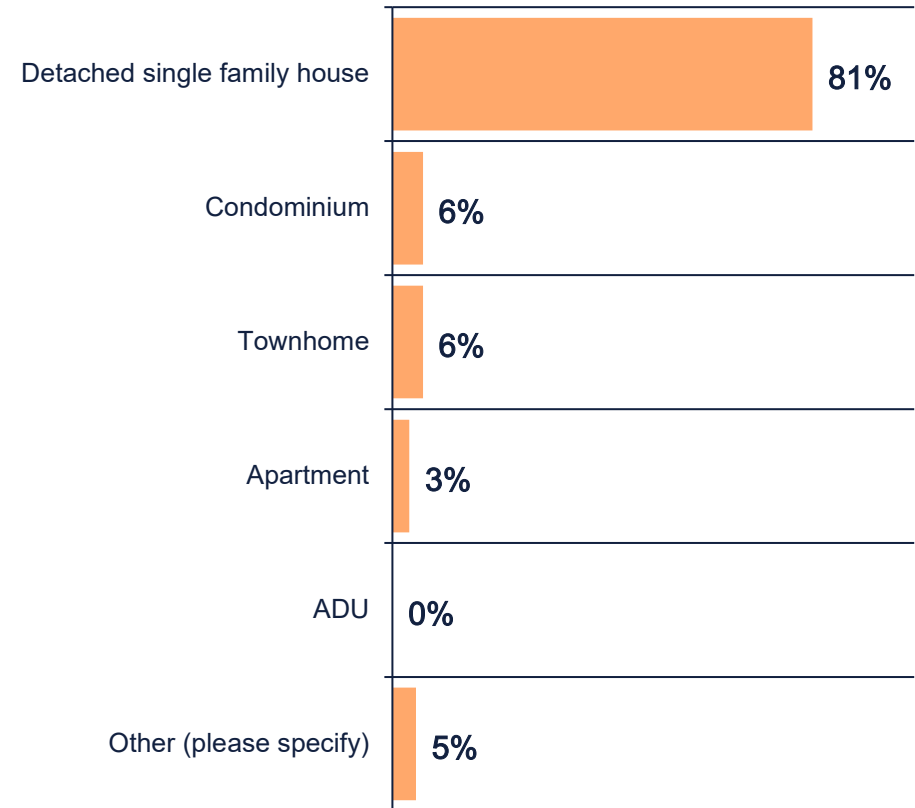


# Organic audiences were more likely to own a detached single-family home.

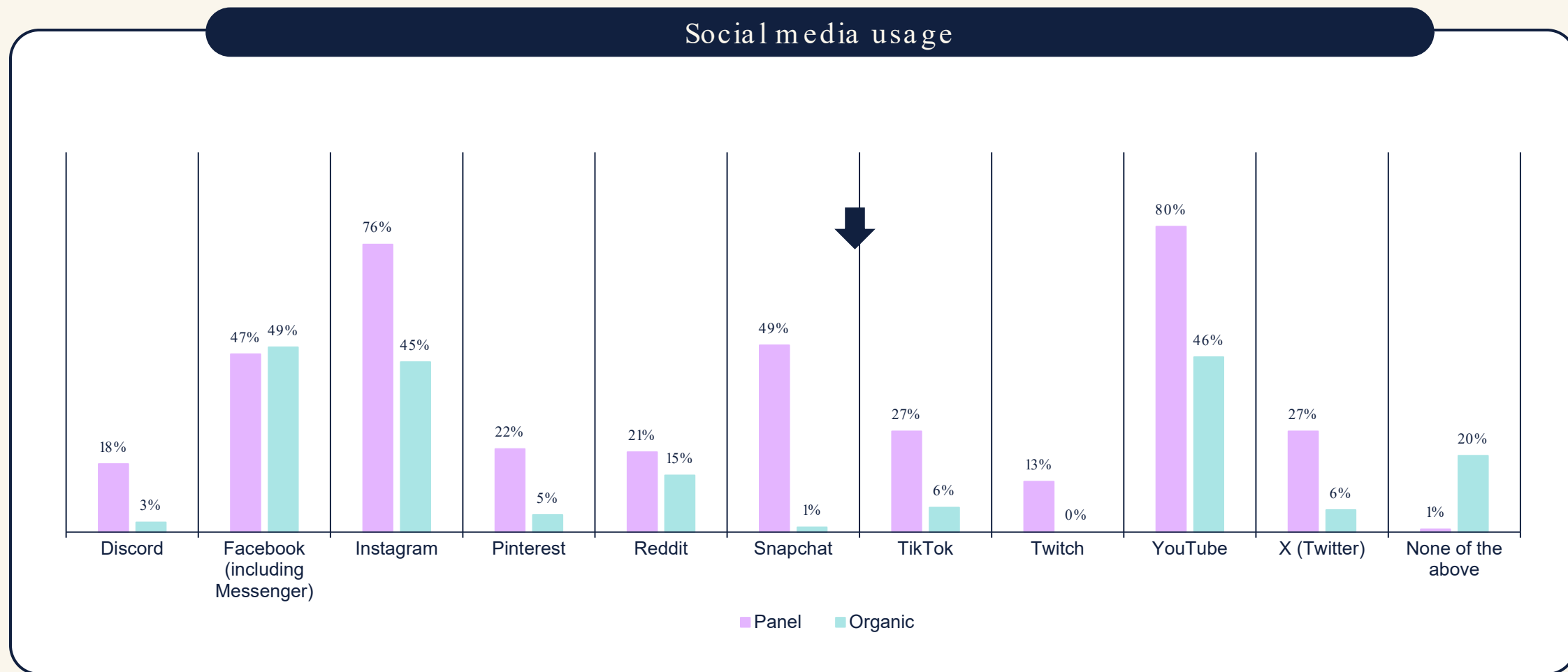
### Housing type-Panel



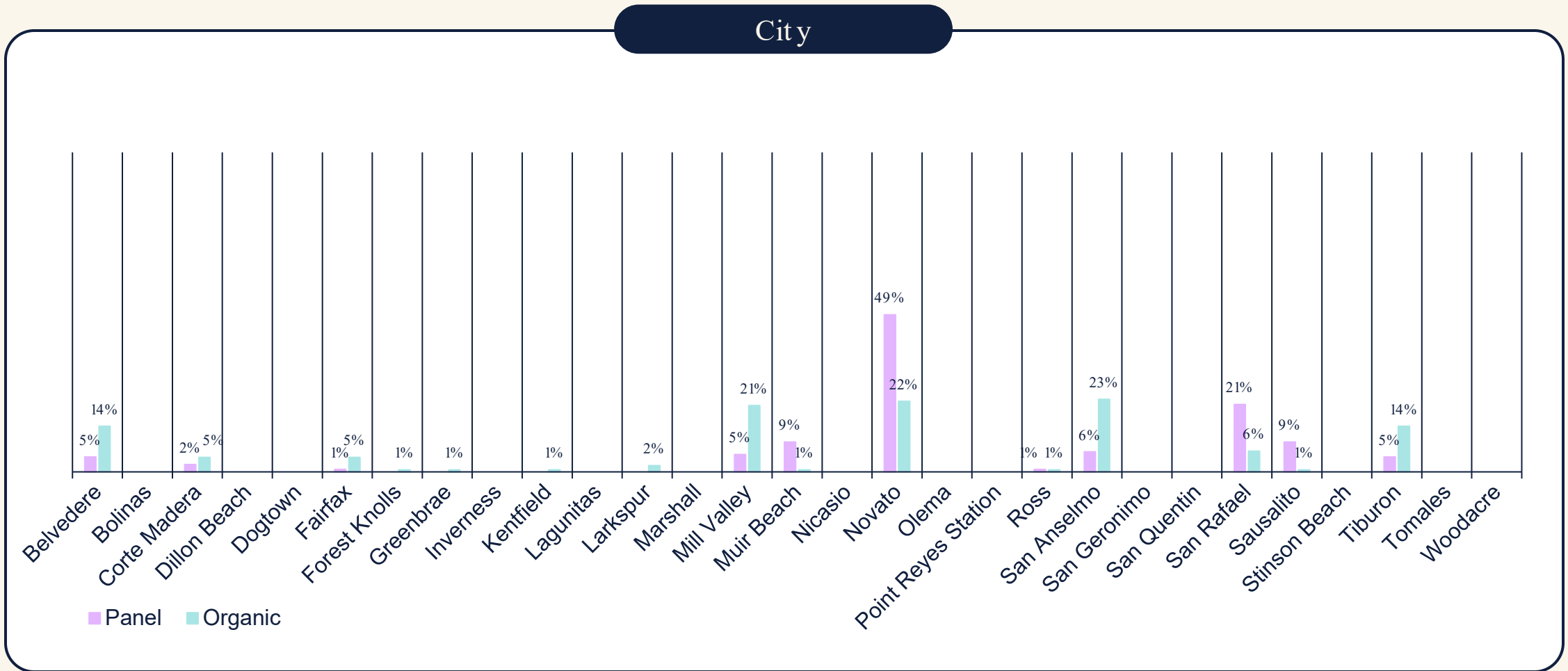
### Housing type-Organic



# Social media usage differed across Panel and Organic survey participants.



# Panel participants were more likely to live in Novato and San Rafael.



Thank you.



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