

WASTE COLLECTION REPORT

Conducted on behalf of MKC
Communications

Clare Kavanagh & Jack
Shakespeare

June 2025

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Contents

1 Research Objectives

2 Sample Profile

3 Waste collection landscape in Ireland

4 Waste collection service

5 Likely to recommend

6 Switching service providers

7 Service provider preference

8 Summary

Research objectives

The purpose of the research is to help the IWMA better understand the waste collection landscape and the perceptions of people regarding how their waste is collected and by whom.

A quantitative survey was conducted through the Ipsos B&A Online Omnibus service to gain this understanding, and comprised of:

- A series of five questions was asked to an online, nationally representative panel of 1,025 respondents.
- Fieldwork was undertaken from 16th – 29th April 2025.

The results from this research are included in this report, and present findings to the following topics:

- Current waste collection providers
- Satisfaction with current waste collection provider
- Likelihood to recommend waste collection provider
- Switching and waste collection service preference.

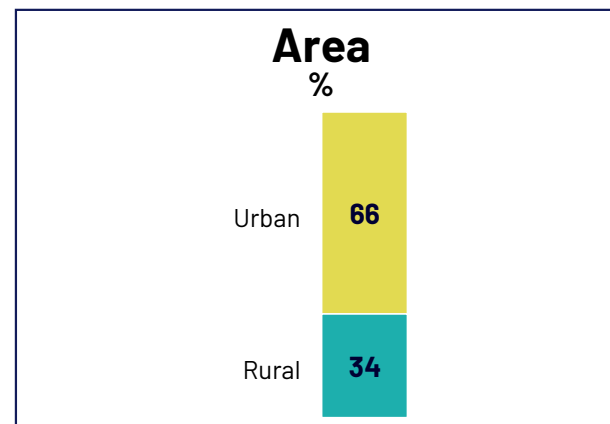
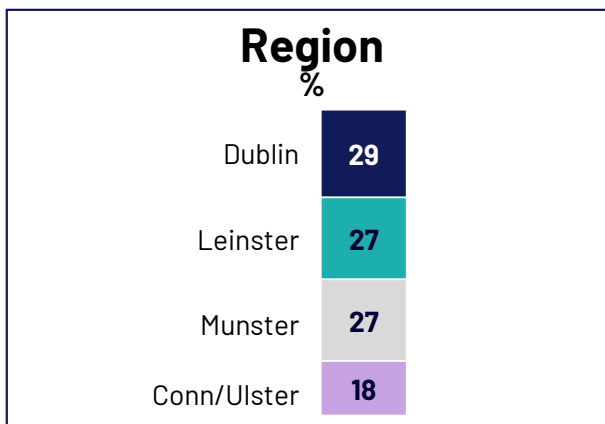
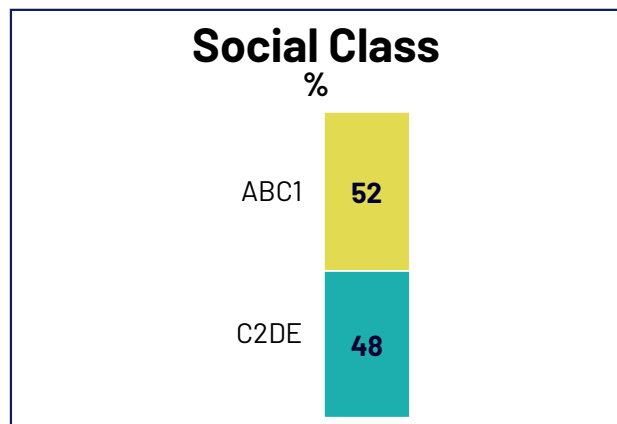
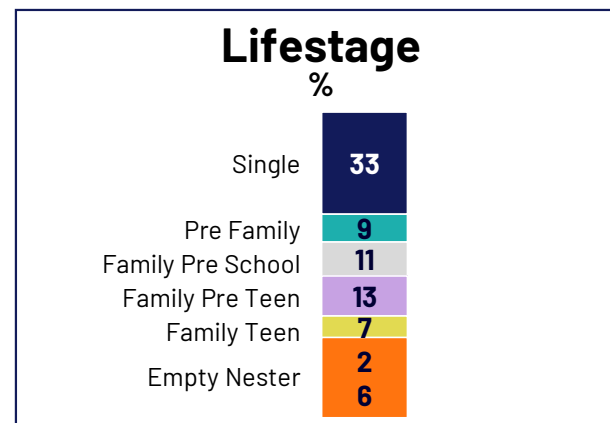
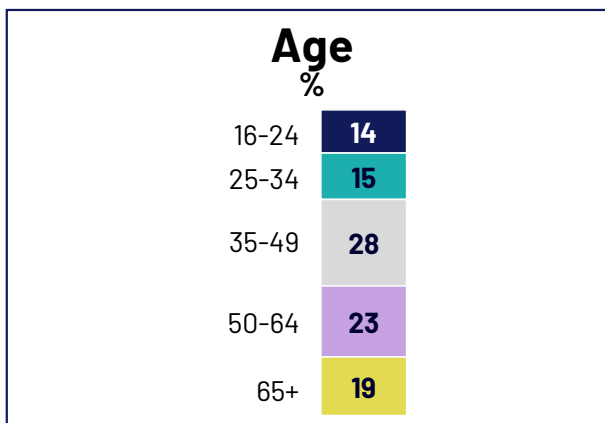
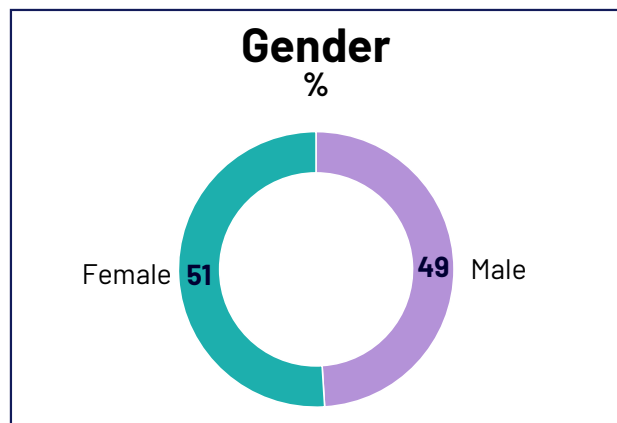


SAMPLE PROFILE



Sample

Strong sample of 1,025 adults.



Profile of sample

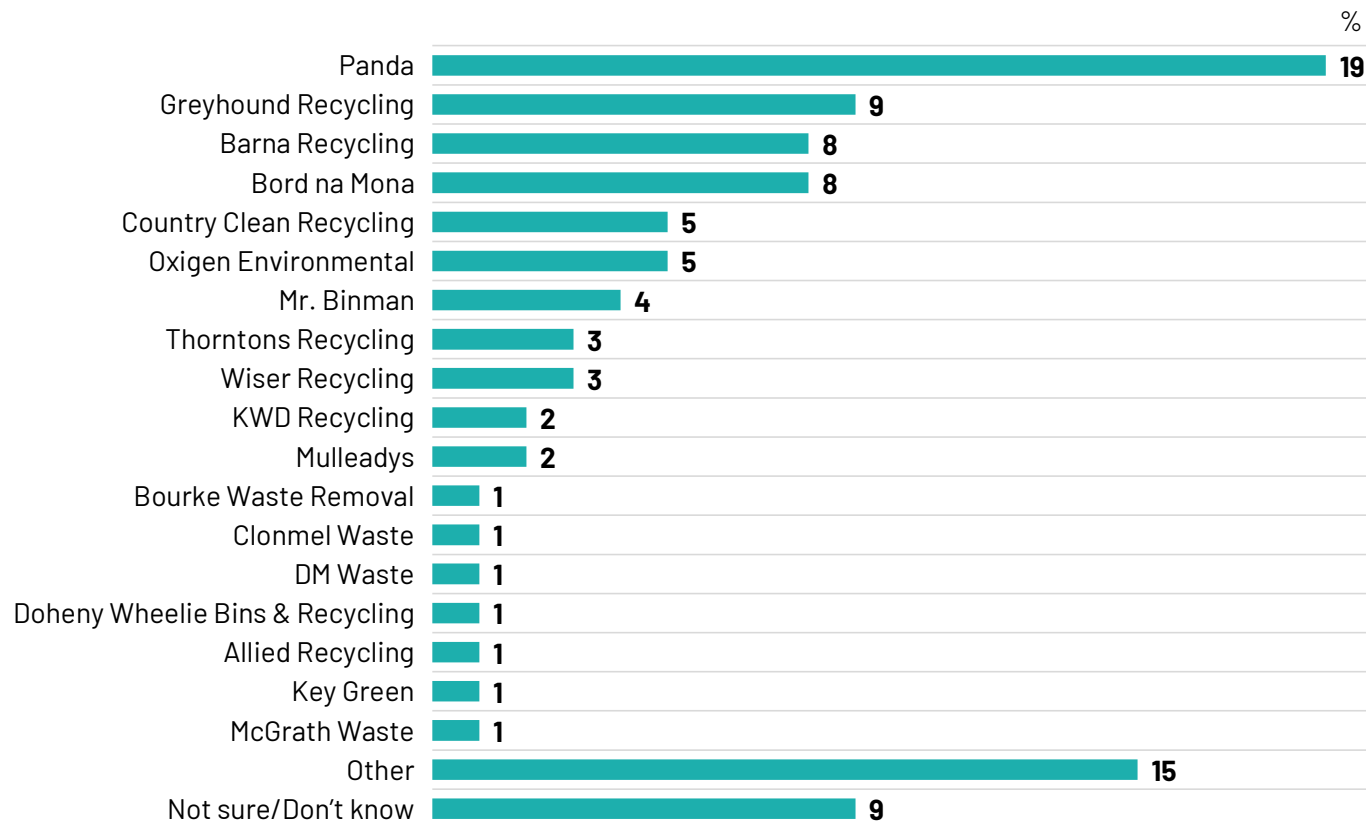
Base: All adults 16+ - 1,025

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WASTE COLLECTION LANDSCAPE IN IRELAND

Waste collection provider

Roughly 1 in 5 identify Panda as their waste collection provider from a list. The next most likely provider identified is Greyhound recycling.



Q.1 What waste collection provider do you currently use?

Base: All adults 16+ - 1,025

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Waste collection provider by demographics

Provider use is not impacted by age, gender, life stage or social class. Those aged 50-64 years or Single 45+ are more likely to have an 'Other' waste collection provider.

	Total	Gender		Age					Social Class		Lifestage						
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Single - 45	Single 45+	Pre Family	Family Pre School	Family Pre Teen	Family Teen	Empty Nester
Base (unweighted):	1025	517	508	76	183	296	264	206	524	501	165	149	93	113	140	82	283
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Panda	19	18	19	21	20	18	17	18	19	19	20	15	20	23	17	16	19
Greyhound Recycling	9	9	9	7	15	7	6	11	10	7	11	6	14	8	6	7	10
Barna Recycling	8	7	9	4	6	12	7	9	7	9	7	5	2	10	10	12	10
Bord na Mona	8	10	6	15	5	6	10	6	11	5	6	9	8	12	8	11	7
Country Clean Recycling	5	6	4	4	5	3	6	6	5	5	5	4	2	2	6	6	7
Oxygen Environmental	5	5	6	9	5	5	4	6	5	6	8	6	2	6	6	6	4
Mr. Binman	4	4	5	5	4	4	6	3	4	5	3	6	6	4	7	3	3
Thorntons Recycling	3	3	3	4	2	2	2	7	2	5	2	4	3	5	1	4	5
Wiser Recycling	3	2	4	1	3	5	2	1	2	4	1	1	3	4	7	3	2
KWD Recycling	2	1	2	1	0	1	3	3	1	3	1	2	-	1	-	3	3
Mulleadys	2	2	2	4	0	3	1	-	2	1	2	1	4	-	5	1	0
Bourke Waste Removal	1	1	1	-	1	1	1	0	1	1	0	1	1	1	1	1	1
Clonmel Waste	1	0	1	-	-	0	2	1	0	1	-	-	-	-	1	1	2
DM Waste	1	1	0	1	1	0	0	1	1	0	1	-	1	-	0	-	1
Doheny Wheelie Bins & Recycling	1	1	0	-	1	-	1	1	1	1	-	1	-	-	2	2	1
Allied Recycling	1	1	1	2	1	2	1	0	1	2	2	1	1	3	-	2	0
Key Green	1	1	1	3	2	0	0	0	1	0	3	1	-	1	-	1	-
McGrath Waste	1	0	1	2	1	-	1	2	1	1	1	1	1	1	-	-	1
Other	15	15	16	2	8	18	24	17	14	16	7	28	12	11	17	17	17
Not sure/Don't know	9	10	8	13	18	10	3	5	11	7	19	8	21	6	2	3	4

Q.1 What waste collection provider do you currently use?

Base: All adults 16+ - 1,025

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*Caution: Low base size



Waste collection provider

Those living in Dublin are more likely to have Panda or Greyhound Recycling as their provider.

	Total	Region					Area	
		Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base (unweighted):	1025	289	736	259	270	207	723	302
	%	%	%	%	%	%	%	%
Panda	19	28	15	29	7	7	22	12
Greyhound Recycling	9	30	0	1	0	-	13	0
Barna Recycling	8	-	12	0	-	46	4	16
Bord na Mona	8	5	9	19	6	1	8	7
Country Clean Recycling	5	-	7	-	18	-	5	5
Oxygen Environmental	5	2	7	14	2	4	6	5
Mr. Binman	4	0	6	-	16	-	3	6
Thorntons Recycling	3	7	2	5	-	-	5	-
Wiser Recycling	3	-	4	-	10	-	1	5
KWD Recycling	2	-	2	-	6	0	1	4
Mulleadys	2	-	2	6	-	-	1	3
Bourke Waste Removal	1	-	1	-	-	4	0	2
Clonmel Waste	1	-	1	-	2	-	0	1
DM Waste	1	-	1	-	0	3	1	0
Doheny Wheelie Bins & Recycling	1	0	1	2	-	-	0	1
Allied Recycling	1	-	2	3	-	1	1	1
Key Green	1	3	-	-	-	-	1	-
McGrath Waste	1	-	1	-	-	5	0	2
Other	15	9	18	15	26	12	11	24
Not sure/Don't know	9	16	6	6	5	8	11	4

Q.1 What waste collection provider do you currently use?

Base: All adults 16+ - 1,025

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 = Significantly higher

WASTE COLLECTION SERVICE



82%

Satisfied with their
waste collection
service.

Waste collection service

Over 4 in 5 are satisfied with their waste collection service. 87% feel their service is reliable. 61% feel that their provider responds quickly if they have a problem, though almost 1 in 3 state this is not applicable to them, likely they have never had a problem.



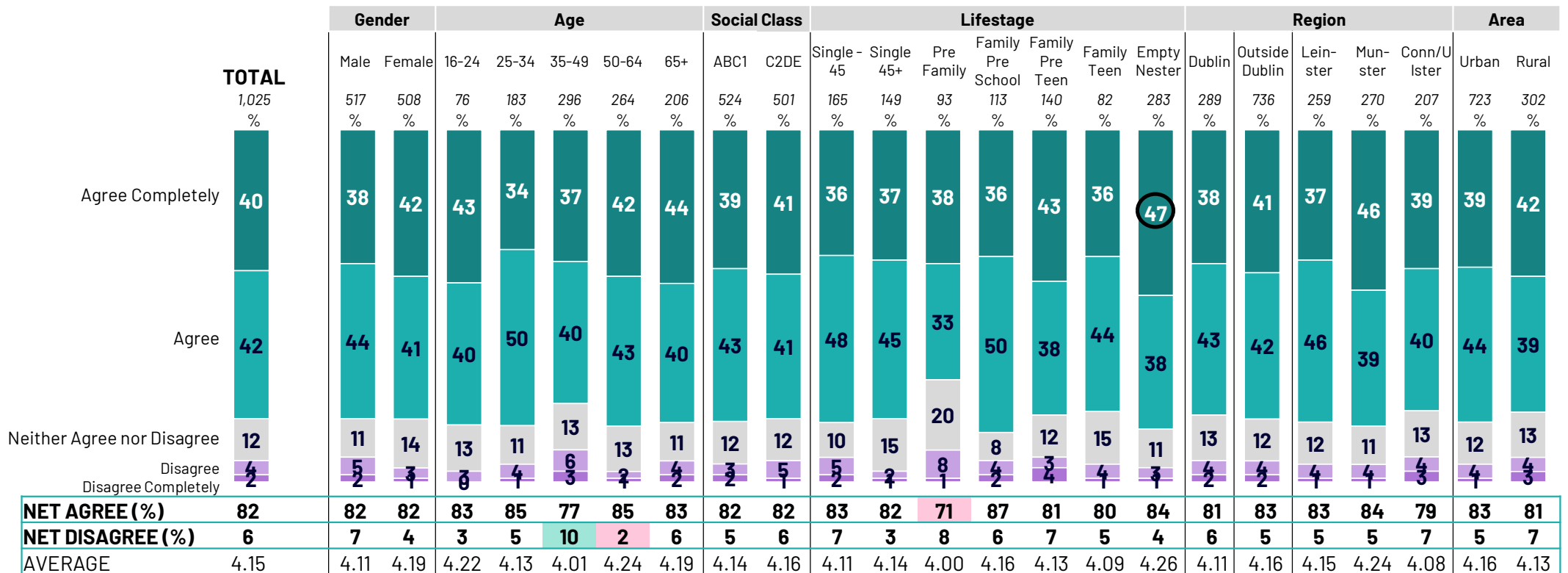
Q.2 Thinking about your current waste collection system, please indicate your level of agreement with the following statements. For each statement, please use a scale of 1 to 5, where 1 is 'Disagree Completely' and 5 is 'Agree Completely'.

Base: All adults 16+ - 1,025

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Waste collection service: *Overall, I am satisfied with my waste collection service.*

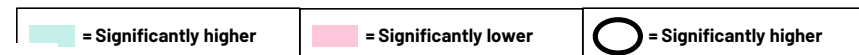
Pre Family are less likely to agree than other life stages.



Q.2 Thinking about your current waste collection system, please indicate your level of agreement with the following statements. For each statement, please use a scale of 1 to 5, where 1 is 'Disagree Completely' and 5 is 'Agree Completely'.

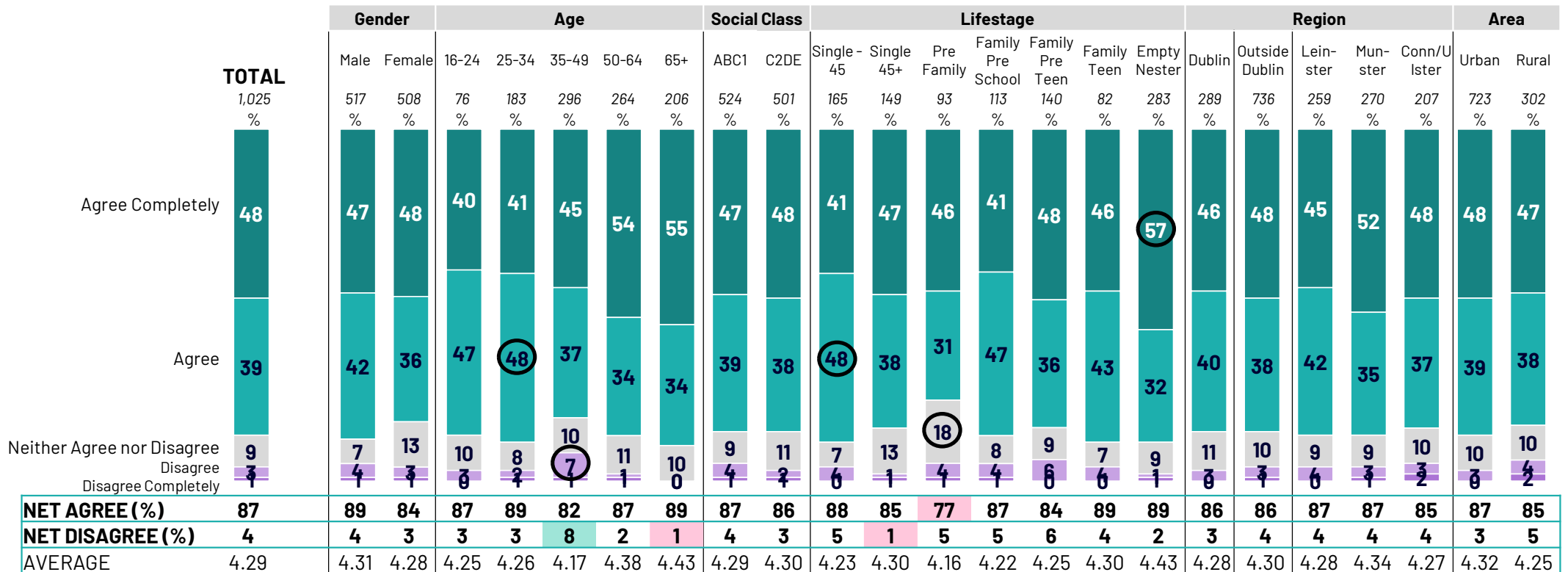
Base: All adults 16+ - 1,025

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Waste collection service: *My waste collection service is reliable.*

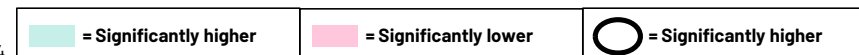
Over half of Empty Nesters agree completely that their service is reliable. Pre Family see lowest agreement.



Q.2 Thinking about your current waste collection system, please indicate your level of agreement with the following statements. For each statement, please use a scale of 1 to 5, where 1 is 'Disagree Completely' and 5 is 'Agree Completely'.

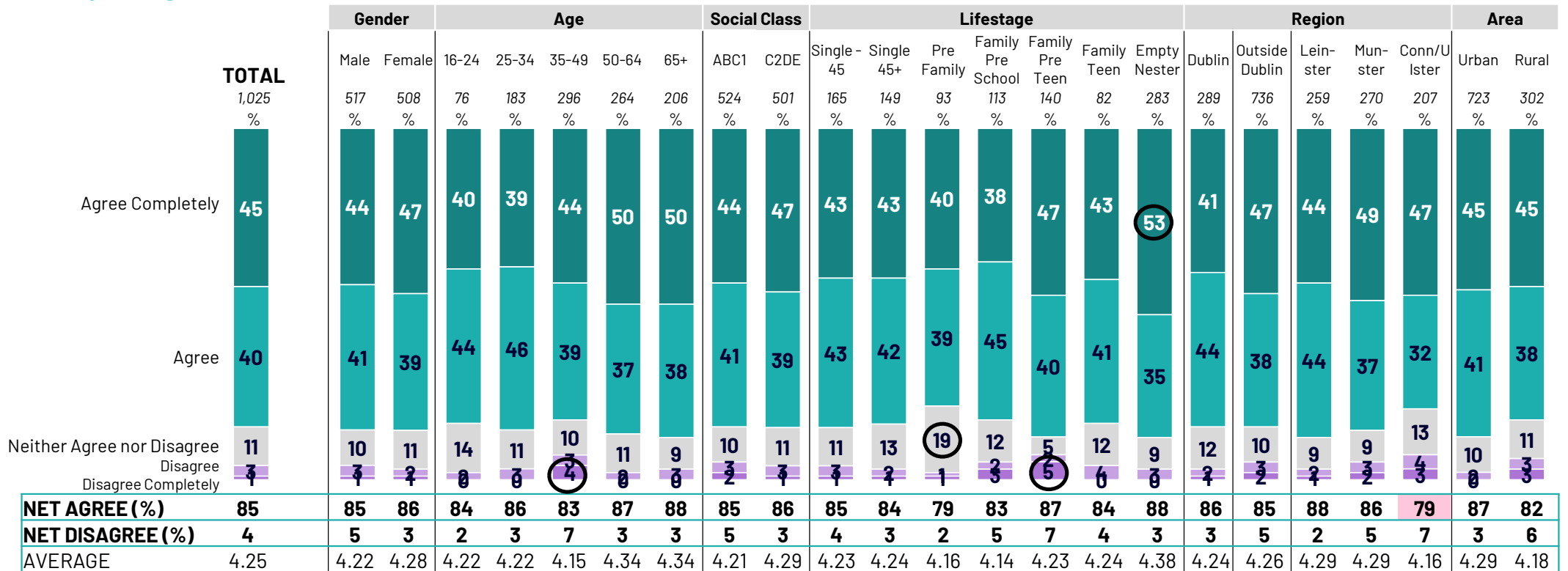
Base: All adults 16+ - 1,025

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Waste collection service: *My waste collection service is convenient.*

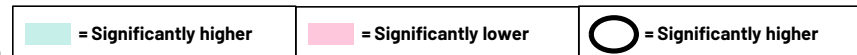
Those in Connacht/Ulster less likely to agree their waste collection is convenient . Rural participants slightly less likely to agree than Urban participants.



Q.2 Thinking about your current waste collection system, please indicate your level of agreement with the following statements. For each statement, please use a scale of 1 to 5, where 1 is 'Disagree Completely' and 5 is 'Agree Completely'.

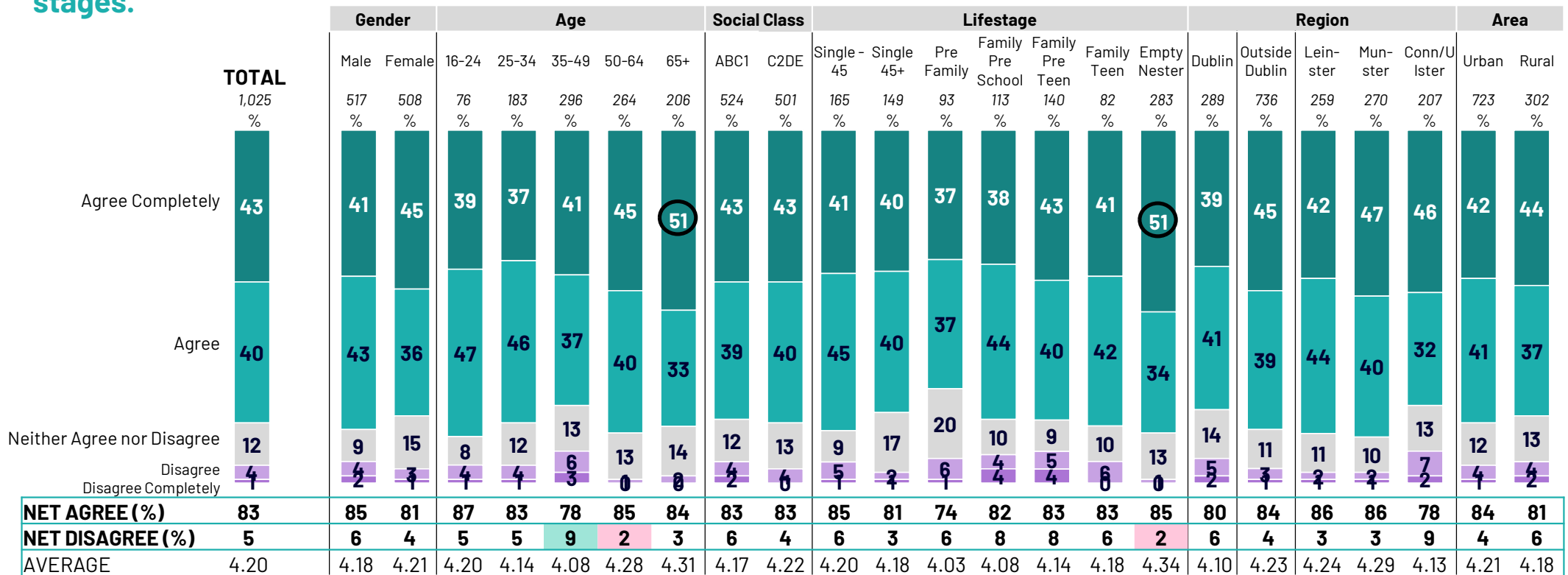
Base: All adults 16+ - 1,025

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Waste collection service: *My waste collection provider gives a good service.*

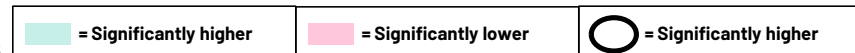
Those aged 35–49 years are least likely to agree. Pre Family also see low agreement compared to other life stages.



Q.2 Thinking about your current waste collection system, please indicate your level of agreement with the following statements. For each statement, please use a scale of 1 to 5, where 1 is 'Disagree Completely' and 5 is 'Agree Completely'.

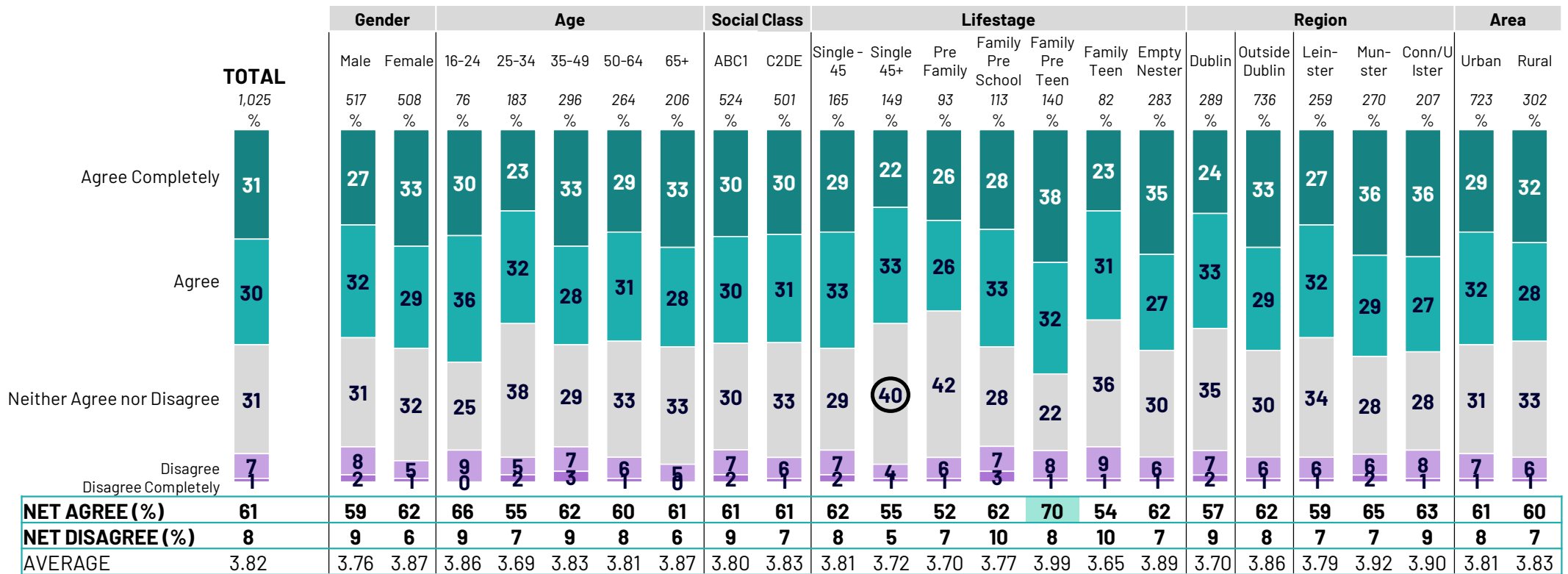
Base: All adults 16+ - 1,025

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Waste collection service: *My waste collection provider responds quickly if I have a problem.*

High levels of neutrality across demographics, perhaps as many people may not have experienced a problem.



Q.2 Thinking about your current waste collection system, please indicate your level of agreement with the following statements. For each statement, please use a scale of 1 to 5, where 1 is 'Disagree Completely' and 5 is 'Agree Completely'.

Base: All adults 16+ - 1,025

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**LIKELY TO RECOMMEND
SERVICE PROVIDER**

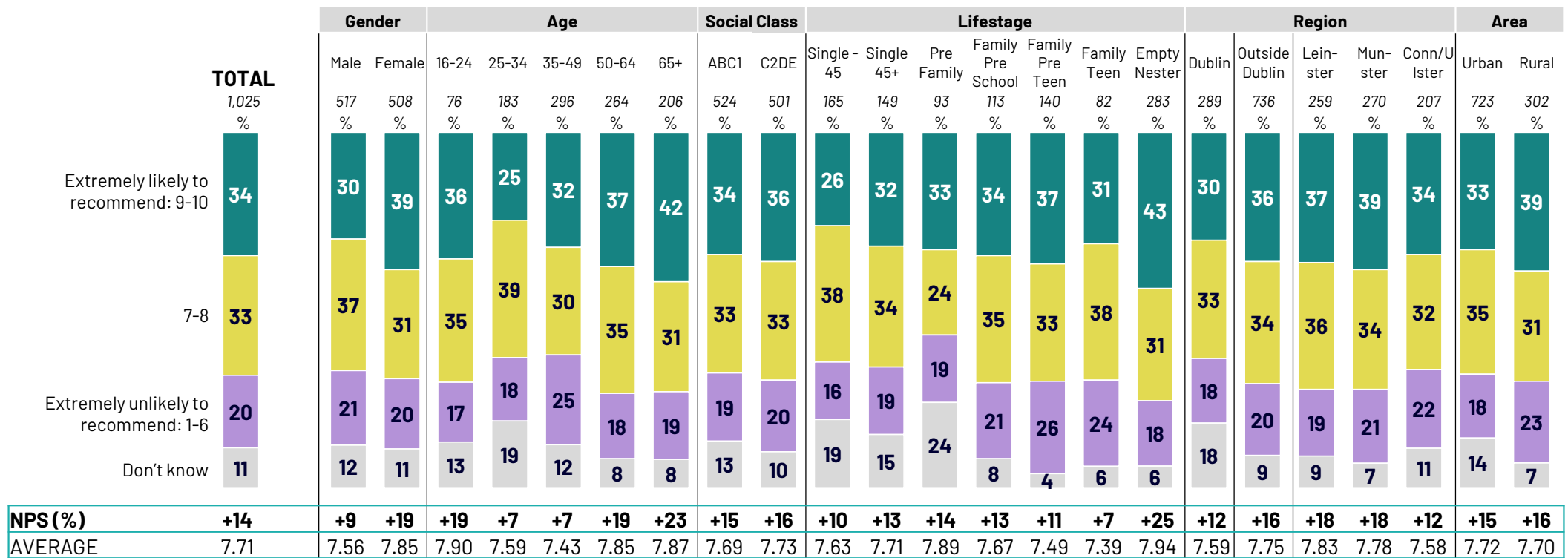


34%

Are extremely likely
to recommend
their waste
collection provider

Likelihood of recommending waste collection provider

On average, 1 in 3 are likely to recommend their waste collection provider. Empty nesters see highest Net Promoter Score (NPS)*. Those aged 25-34 years and 35-49 years see lowest NPS.



Q.3 How likely would you be to recommend your waste collection provider to others on a ten-point scale, where 10 is extremely likely and 1 is extremely unlikely.

Base: All adults 16+ - 1,025

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***Net Promoter Score:** This is done by subtracting those who would not recommend their service provider from those who would recommend. Example: 34% - 20% = +14 NPS.

SWITCHING SERVICE PROVIDERS



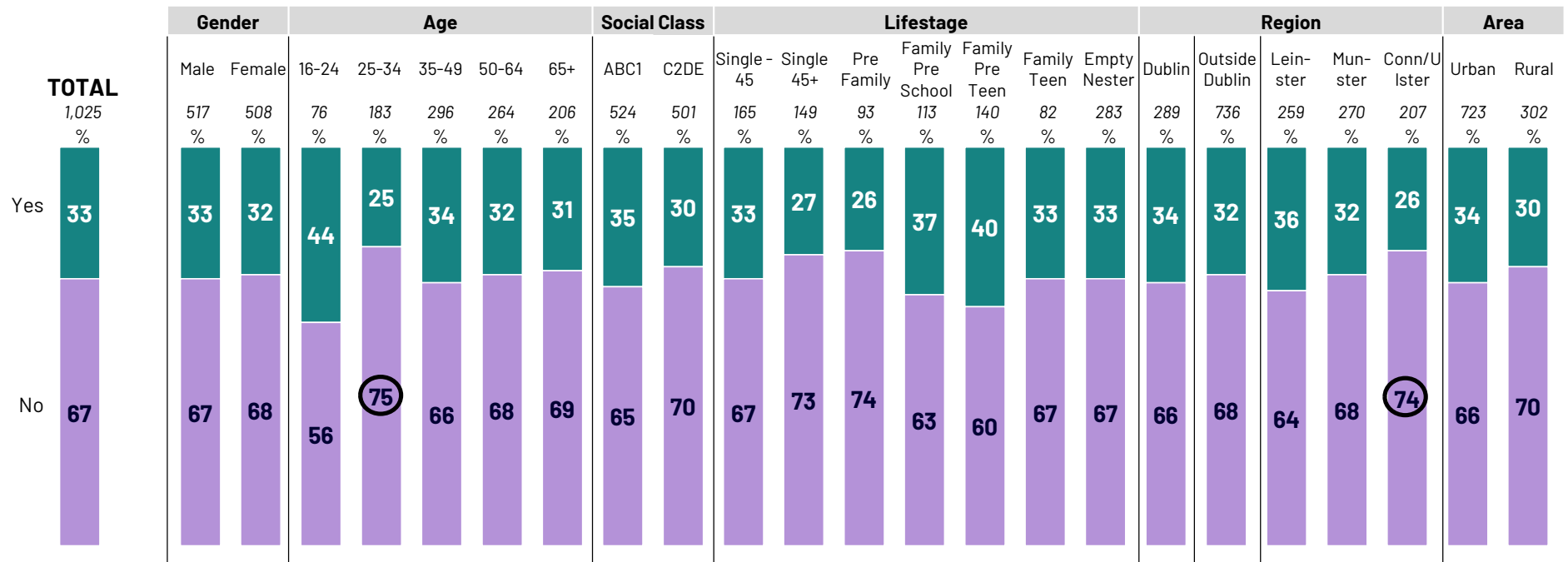
33%

Have switched
their waste
collection provider



Switched provider

On average, 1 in 3 people in Ireland have switched their waste collection provider at least once. Those aged 25-34 years least likely to have switched than other age cohorts. Connacht/Ulster also less likely to have switched provider.



Q.4 Have you ever switched your waste collection provider?

Base: All adults 16+ - 1,025

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○ = Significantly higher

SERVICE PROVIDER PREFERENCE

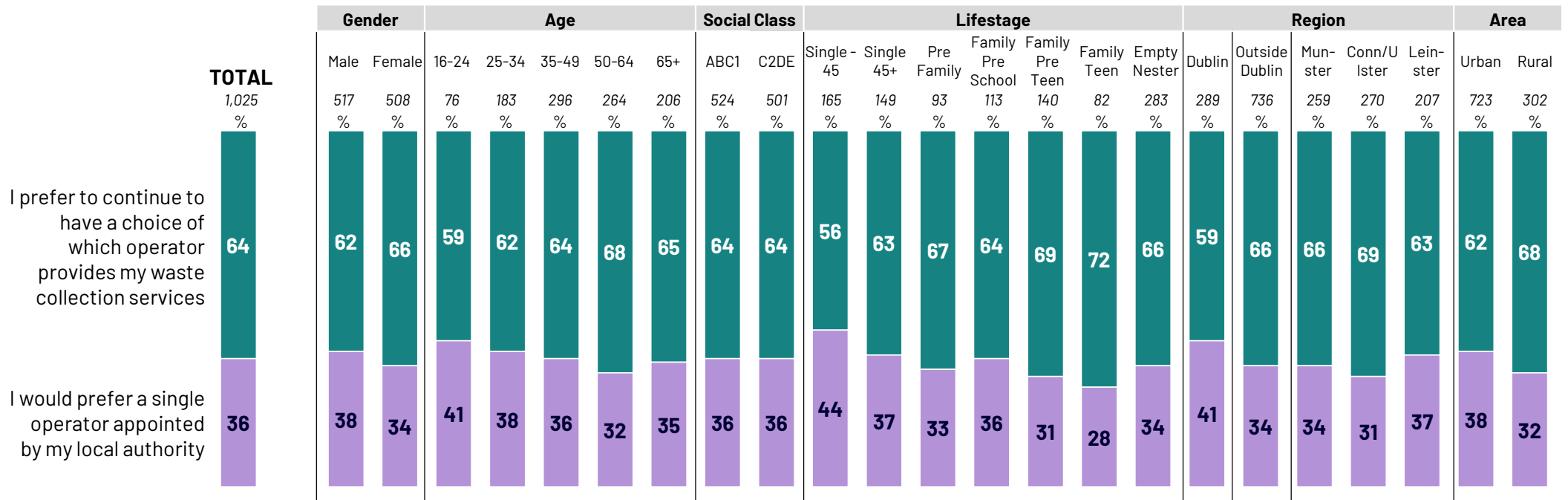


64%

would prefer to
continue having a
choice of waste
collection service
providers.

Service provider preference

Roughly 2 in 3 would prefer to continue having a choice of providers rather than a single operator appointed. Those in Dublin slightly more likely to prefer a single operator appointed as compared to those outside of Dublin.



Q.5 In future, what system of waste collection would you prefer in your area?
 Base: All adults 16+ - 1,025
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SUMMARY

1

Panda and **Greyhound** are most likely providers names as used, particularly in Dublin. However, there is **strong competition** with fragmented mentions of many providers used. Barna Recycling are a popular choice for people outside of Dublin.

2

Overall, **82%** are satisfied with their current waste collection service provider. Providers are highly rated on aspects such as: Reliability (87% agree), convenience (85% agree) and good service (83% agree). Sixty one percent believe their service provider responds quickly if they have a problem, but worth noting, roughly 1 in 3 have not needed to contact their provider due to a problem.

3

On Balance, more people would recommend their current provider than not **NPS is plus 14**.

1 in 3 are very likely to recommend their waste collection service provider (scores 9-10 on a 10-point scale). One in five are not likely to recommend their provider (Scores 1-6).

4

1 in 3 people claim to have switched service providers at least once. Urban dwellers slightly more likely to be have switched.

5

Most people (64%) would prefer to continue having the choice of waste collection service providers rather than a single local authority-appointed provider. Those outside Dublin especially likely to prefer a choice.

THANK YOU

NAME:

Clare Kavanagh

DETAILS:

Clare.Kavanagh@ipsos.com

NAME:

Jack Shakespeare

DETAILS:

Jack.Shakespeare@ipsos.com