SECNewgate Research

ASBESTOS SAFETY & HOME IMPROVEMENT RESEARCH

PREPARED FOR THE ASBESTOS SAFETY AND ERADICATION AGENCY (ASEA)

NOVEMBER 2021

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EXECUTIVE SUMMARY

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KEY SURVEY FINDINGS

The following outlines key findings from a nationally representative online survey conducted by SEC Newgate Research with n=1,506 'home improvers' to evaluate asbestos knowledge, attitudes, behaviours and opportunities for intervention; this follows a narrower study of 'DIYers' conducted in 2020. The survey was fielded between 20-30 August 2021, with a robust error margin of +/-2.5% at the 95% confidence level.

67% of Australians are 'home improvers'—*split evenly between those who prefer to DIY vs. those who prefer to outsource to others. Amongst home improvers,* ***we identified five distinct segments****.*

38% have worked on a risky property built between 1940-1990, the decades of greatest concern.

28% *of those who found asbestos during a project* **admitted to using an improper method of disposal**, *mostly commonly placing it in curbside bins.*

Compared to other potential risks, asbestos is seen as less likely but more serious—*though a third of those who think it's not very likely also think it's not very serious.*

Pandemic-related motivations *played a role in recent projects* **for 46% of all home improvers.**

Depending on the home improvement project type, 46-69% within the last five years were also commenced during the pandemic.

Knowledge and confidence levels regarding asbestos remain low.

Only two in three at most could correctly identify each potential source of asbestos when prompted with a list—while two in five picked at least one incorrect source.

Online videos, hardware shops and family/friends are the top sources of home improvement inspiration and information. *Hardware shops are also the most popular way to receive information by far (48%).*

Recall of asbestos information has increased from 25% to 35%—*though this continues to be general rather than practical (e.g. it's dangerous, it's in older houses, it causes cancer and other health issues).*

While 22% have contacted an asbestos specialist in the past, 38% feel professional assistance is too expensive—*while 15% believe you don't need training or specialists.*

70%+ agree that builders, governments, hardware shops and home improvement shows should provide asbestos information.

CONCLUSIONS & CONSIDERATIONS

1) The fact that two in three adults are inclined to undertake home improvement projects big or small—with or without professional help—underscores the importance of improving the asbestos safety knowledge and capacity of this critical target audience.

2) The formal segmentation analysis undertaken in this project provides, for the first time, a more nuanced understanding of different 'home improvers'—using demographic, socioeconomic, behavioural and attitudinal traits to identify five distinct clusters of similar people to help prioritise future communications and engagement activities. From most to least at risk, they are:
   - Financially vulnerable DIYers (comprising 27% of the total 'home improver' audience);
   - Multicultural young urbanites (21%);
   - Well-heeled DIY enthusiasts (8%);
   - Financially comfortable families (16%); and
   - Cautious older outsourcers (28%).

3) While asbestos safety is not top-of-mind, virtually all home improvers are aware of it when prompted and most readily acknowledge that it is dangerous. In some ways, there is already a high degree of *general* awareness of asbestos.

4) However, genuine knowledge and capacity to manage asbestos tend to be far poorer—with underestimation of the likelihood of exposure, limited understanding of *how* asbestos is dangerous, confusion as to where asbestos-containing materials (ACMs) can be found in their own home, and a lack of confidence in knowing how to manage ACMs if found during an improvement project.

5) While most say they would contact a professional for help, this may be overstated—with a clear gap between those who suggest improper disposal methods *as a hypothetical solution* vs. a higher proportion *admitting* to improper disposal (itself likely an underestimation due to social desirability bias). Cost, convenience and knowledge are key barriers to proper disposal.

6) Asbestos attitudes amongst home improvers can be interpreted through a behavioural framework such as the well-established COM-B model—which posits that a particular *Behaviour* will only occur when there is sufficient *Capability, Opportunity* and *Motivation*. This highlights potential areas of future focus:
   - *Capability* could be improved by addressing knowledge gaps regarding the specific impacts of asbestos, where ACMs could be found, how to identify ACMs, how to protect their family, and where to find qualified professional assistance.
   - *Opportunity* could be improved by making it easier to find licensed asbestos specialists, providing guidance on typical scopes of work and costs, and subsidising specialist costs.
   - *Motivation* could be improved by promoting the likelihood of encountering asbestos in the home to lift perceptions of asbestos as an unlikely risk, or a risk that doesn't need to be considered as its consequences are vaguely understood. Regulatory mandates could also be considered for motivation.

7) However, all of this involves a reasonable degree of complexity and nuance for a topic that lacks salience for most home improvers—meaning attempts to engage on such granular details may make the target audience feel overwhelmed by information overload and no more certain of what to do.

8) Given the low baseline of knowledge and capacity at present, it may be prudent to keep messaging simple – e.g.:
   - *Asbestos is lurking in more places at home than you'd think, and its consequences can be deadly for you and your family.*
   - *For peace of mind, contact an asbestos specialist before starting any home improvement project that disturbs the walls, roofing, flooring or fixtures—no matter how small the task.*
   - *Head to asbestossafety.gov.au to find an asbestos specialist near you, as well as information on how to identify things that may contain asbestos and how to protect your family.*

RESEARCH FINDINGS

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DEFINING HOME IMPROVEMENT SEGMENTS

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METHODOLOGY OVERVIEW

AUSTRALIAN POLLING COUNCIL SHORT METHODOLOGY DISCLOSURE STATEMENT

Overview of approach

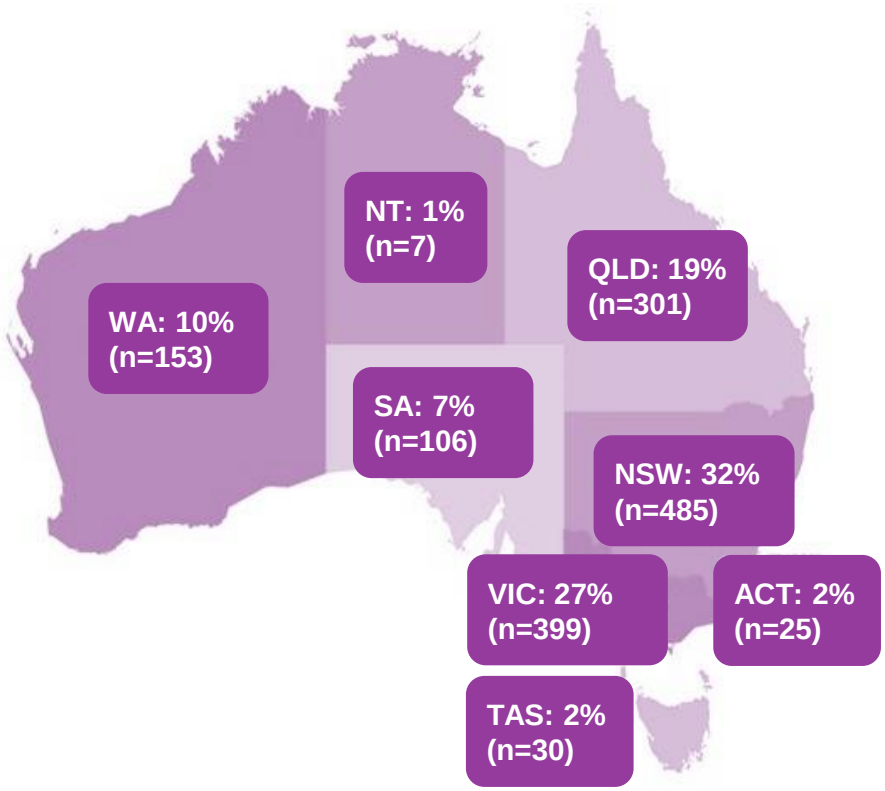
- A nationally representative online survey
- Median completion time = 16 minutes
- Conducted between 20th August and 30th August
- Fieldwork conducted by SEC Newgate Research's trusted partner Lucid
- Participant sample sourced from opt-in market research panels managed Lucid's professional panel partners
- Questionnaire developed by SEC Newgate Research in consultation with ASEA
- Results weighted by:
  - Incidence of home improver age and gender proportions based on survey screen-out data
  - Census-representative proportions by state/territory interlocked with metro/regional

Participant overview

- Survey conducted with participants who:
  - have completed one or more home improvement project/s;
  - are currently working on one or more home improvement project/s; and/or
  - are planning to undertake one or more home improvement project/s.

More detailed notes regarding the project's background, objectives and methodology – including notes to the reader – appear in the appendices.

Online survey sample



Total sample size	1,506
Margin of error *	+/- 2.5%

** Margin of error is maximum confidence interval for estimates based on the total sample, at 95% confidence level. Estimates for sample sub-groups will have a wider confidence interval.*

HOME IMPROVERS: WHAT AND WHO

Home improvement: DIYers vs. outsourcers

The benchmark survey in 2020 had focused on a narrower scope of people who would attempt at least part of a larger renovation (e.g. knocking down walls) *or* a smaller repair task (e.g. installing new shelves) on their own—even if they had assistance from others.

In this survey, the scope was broadened to include anyone undertaking a home improvement project—even if they've outsourced the renovation or repair task entirely; comparisons should therefore be made with caution. In this report, we've referred to participants as **'home improvers'**.

Where relevant, we have highlighted differences between **'DIYers'** (i.e. someone who would attempt as much of a major renovation as possible) and **'outsourcers'** (i.e. someone who would ask family, friends or paid professionals to undertake most or all of a major renovation).

Who is a 'home improver'?

Recognising the aspirational nature of home improvement for some, our survey included people who *have* as well as *would* undertake a home improvement project—ensuring we could evaluate all at-risk cohorts within the community. Based on this definition, we found…

67% of Australians can be considered 'home improvers',

split evenly between DIYers (51% of home improvers) and outsourcers (49% of home improvers).

Home improvers in general are more likely to be male (69% male vs. 64% female) and younger (69% aged under 55 years vs. 62% aged 55+) when compared to the overall Australian population.

98% have some previous home improvement experience—whether DIY or outsourcing

Only 79% initially reported having undertaken a home improvement project, until prompted with a list – suggesting some smaller repair tasks are not always seen as 'home improvement', making it all the more challenging to target this cohort in communications.

16% reported having a qualification in building, construction, or other related industry

Of these, most common were general construction White Cards (34%), painting (30%), carpentry or joinery (22%), licensed electrical work (21%), licensed building work (17%), licensed plumbing or gas work (15%), tiling (12%) or plastering (11%).

S5. Which of the following apply to you? // S7. Do you hold any formal qualifications in building, construction or related trades such as electrical or plumbing? // S8. Which of the following qualifications d you hold? // Base: All participants (n=1,506)

HOME IMPROVEMENT APPROACHES

Compared to 'DIYers' from the previous survey, this broader cohort of 'home improvers' are naturally more likely to prefer to rely on others to get the job done – large or small.

For larger renovations…

Those who would do it entirely on their own

2020	2021
22%	11% ↓

Those who would get some help from the pros

2020	2021
26%	28%

Those who would get some help from friends or family

2020	2021
14%	12%

Those who would rely on or outsource to the pros

2020	2021
33%	43% ↑

Those who would rely mostly on friends or family

2020	2021
4%	6%

For smaller renovations…

Those who would do it entirely on their own

2020	2021
51%	31% ↓

Those who would get some help from the pros

2020	2021
12%	25% ↑

Those who would get some help from friends or family

2020	2021
25%	25%

Those who would rely on or outsource to the pros

2020	2021
6%	10% ↑

Those who would rely mostly on friends or family

2020	2021
6%	10% ↑

S6. If you needed to undertake a home improvement project – i.e. renovate or repair something – which of the following best describes how you would approach this?
Base: All participants (n=1,506)

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

HOME IMPROVER SEGMENTS

Detailed profiling can be found in the data tables accompanying this report.

To better identify personas for targeted communications and engagement, a formal statistical segmentation was iteratively developed using Latent Class Analysis – yielding five distinct segments based on clustering of similar demographic, socioeconomic, behavioural and attitudinal traits. These segments are outlined below, with percentages indicating their share of all home improvers.

Financially vulnerable DIYers
(27%, n=395)

Defined largely by their experience of relative financial vulnerability, this segment is made up of a younger to middle aged cohort (under 55 years) who prefer to DIY—likely as a budget measure.

This segment is more likely to be living in a smaller house as a renter—solo, with a partner, or in a share-house. However, this is a skew rather than a defining feature—so the segment still includes home-owners who are able to undertake larger renovations.

They tend to consider it less important to know about asbestos, and are also less likely to agree that asbestos can cause harm—coupled with their propensity to DIY, this makes them the most at-risk segment of all.

Multicultural young urbanites
(21%, n=300)

This segment has a strong multicultural background—with their cultural and linguistic diversity being their defining characteristic.

They also tend to be younger (under 35 years), usually residing in inner-city locations as renters of apartments or smaller houses. They may be experiencing some financial vulnerability, but tend to be more educated and better paid than the Financially Vulnerable DIYers.

Their approach to home improvement is largely focused on asking family and friends for help on DIY projects, though they are no more/less likely to DIY overall.

They feel less knowledgeable about asbestos than others, but are likely to engage an asbestos specialist.

Well-heeled DIY enthusiasts
(8%, n=119)

This segment has a strong affinity for home improvement—specifically in undertaking DIY projects as a hobby. Of all segments, they have worked the most on home improvement projects across all project types.

They are typically middle aged (between 35-54 years) and more likely to be located in a regional town or city. They are also usually in the midst of paying off a mortgage, and likely to be the head of a family with children under 18 years still living at home.

They are typically financially-comfortable – i.e. 'well-heeled' – with higher educational attainment and higher household incomes.

Financially comfortable families
(16%, n=225)

A 'middle of the road' home improver, this segment has an even preference for both DIY and outsourcing depending on the project type. They are the least financially vulnerable.

They are similar to Well-heeled DIY Enthusiasts in many ways: Skewing middle-aged (35-54 years), with children still living at home, with high levels of educational attainment and income.

They are also more likely than many of the other segments to have undertaken a number of different types of home improvement projects—but the difference is that they do not have the same DIY zeal.

Notably, this segment is significantly more likely to report having asbestos training or qualifications.

Cautious older outsourcers
(28%, n=467)

This segment skews older than the others (aged 55+ years) – likely retirees living in regional or rural areas, with all children having left home.

They are less likely to have new home improvement projects in the pipeline, having completed what they wanted to do—though of course this is not universally true for everyone in this segment.

They tend to have a strong preference for outsourcing projects large and small—backed by their relative financial comfort that allows them to hire professionals.

They report feeling more knowledgeable about asbestos and its dangers—but are conversely less likely to engage an asbestos specialist.

HOME IMPROVEMENT EXPERIENCES AND MOTIVATIONS

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TYPES OF PROPERTIES WORKED ON

Consistent with the benchmark DIYer survey, most home improvers have worked on only one property in the past five years—with 38% built during the riskiest years.

In the last five years, home improvers on average have completed or started work on…

4 different properties

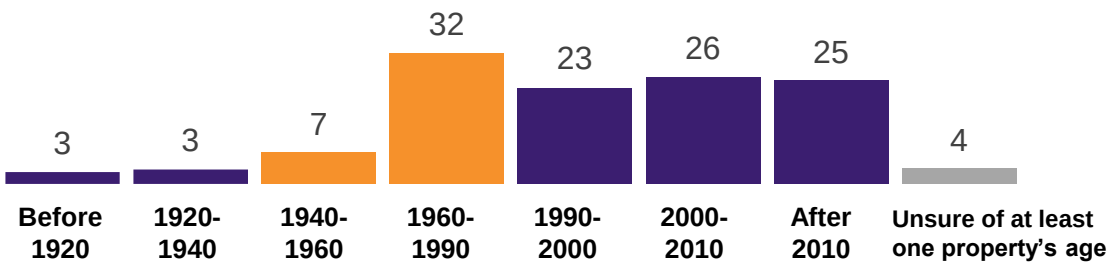
Though most have only worked on **one** property

In the last five years, home improvers have worked on the following properties…

	2020	2021
Properties they lived in	88%	78% ↓
Investment properties	16%	16%
Rented properties	*Not asked*	9%
Properties owned by friends / family	*Not asked*	8%

Due to broadening the scope from 'DIY home renovation' to 'home improvement'

Proportion of home improvers who have worked on a property of the following vintages (within the last five years)…



- Greatest asbestos risk – a **'risky property'** *(nett 38%, with rounding)*

More likely amongst this segment (51%)—likely due to their own older age

As can be expected, the ages of properties worked on is similar to the proportions found in the 2020 survey.

Q1. In the last 5 years, how many different properties have you started a home improvement project on? // Q2. Thinking about the home improvement project/s you started within the last 5 years, what is the approximate age of the property/ies? // Q3.Which of the following describes the property/ies you started a home improvement project on within the last 5 years? // Base: Participants who have completed or started a home improvement project (n=935)

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

TYPES OF PROJECTS UNDERTAKEN

Similarly, most home improvers have undertaken only two projects in the last five years – most commonly painting (53%), outdoor repairs (39%), flooring (39%) and fencing (35%).

In the last five years, home improvers on average have completed or started…

4.9 different home improvements projects

Though, as in 2020, most have only worked on **two** projects

Types of projects currently working on or undertaken within the last 5 years (%)

Internal or external painting

2020	2021
Not asked	53

In 2021: **62%** started during **lockdown**

In 2021: **64%** on a **risky property**

Outdoor repairs and improvements

2020	2021
41	39

In 2021: **58%** started during **lockdown**

In 2021: **47%** on a **risky property**

Flooring / laying new floors

2020	2021
34	39

In 2021: **50%** started during **lockdown**

In 2021: **48%** on a **risky property**

Replacing / repairing a fence

2020	2021
41	35 ⬇

In 2021: **59%** started during **lockdown**

In 2021: **45%** on a **risky property**

Small bathroom improvements

2020	2021
38	32 ⬇

In 2021: **62%** started during **lockdown**

In 2021: **36%** on a **risky property**

Small kitchen improvements

2020	2021
32	28

In 2021: **60%** started during **lockdown**

In 2021: **30%** on a **risky property**

Cont'd over the page…

Q4. How many separate home improvement projects have you started in the last 5 years? // Q5.Which of the following types of home improvement projects... A) are you currently working on, if any? B) have you completed within the past 5 years, if any? C) have you completed more than 5 years ago, if any? D) are you planning in the next 12 months, if any? E) are you planning a year or more from now, if any?// Q6. Thinking about your current or most recent project/s, did you start this during the COVID-19 lockdown period (i.e. since March 2020)? // Base: Participants who have completed or started a DIY home project within the last 5 years (n=935) // Base: All participants (n=1,506)

TYPES OF PROJECTS UNDERTAKEN *CONT'D*

Between 46-69% of each project type have been commenced since March 2020, while the share projects undertaken on properties from the riskiest years range from 13-64%.

Types of projects currently working on or undertaken within the last 5 years

New fixtures that require drilling

2020	2021
37	27 ↓

In 2021: **65%** started during **lockdown**

In 2021: **32%** on a **risky property**

Full bathroom renovation

2020	2021
22	26 ↑

In 2021: **46%** started during **lockdown**

In 2021: **37%** on a **risky property**

Full kitchen renovation

2020	2021
22	24

In 2021: **46%** started during **lockdown**

In 2021: **28%** on a **risky property**

Laundry make-over

2020	2021
22	24

In 2021: **53%** started during **lockdown**

In 2021: **34%** on a **risky property**

Knocking down a wall

2020	2021
14	15

In 2021: **51%** started during **lockdown**

In 2021: **18%** on a **risky property**

Demolition of any external buildings

2020	2021
10	11

In 2021: **51%** started during **lockdown**

In 2021: **14%** on a **risky property**

Other

2020	2021
15	9 ↓

In 2021: Other projects typically involved landscaping (paving, gardens and new decks), and extensions.

In 2021: **69%** started during **lockdown**

In 2021: **13%** on a **risky property**

As could be expected, a significantly higher proportion of home improvers across most project types in 2021 said that they have started a project during the pandemic compared to 2020—given an additional 14 months have passed between the two surveys.

More likely to have worked on all project types, compared to other segments

Q5. Which of the following types of home improvement projects... A) are you currently working on, if any? B) have you completed within the past 5 years, if any? C) have you completed more than 5 years ago, if any? D) are you planning in the next 12 months, if any? E) are you planning a year or more from now, if any? // Q6. Thinking about your current or most recent project/s, did you start this during the COVID-19 lockdown period (i.e. since March 2020)? // Base: Participants who have completed or started a DIY home project within the last 5 years (n=935) // Base: All participants (n=1,506)

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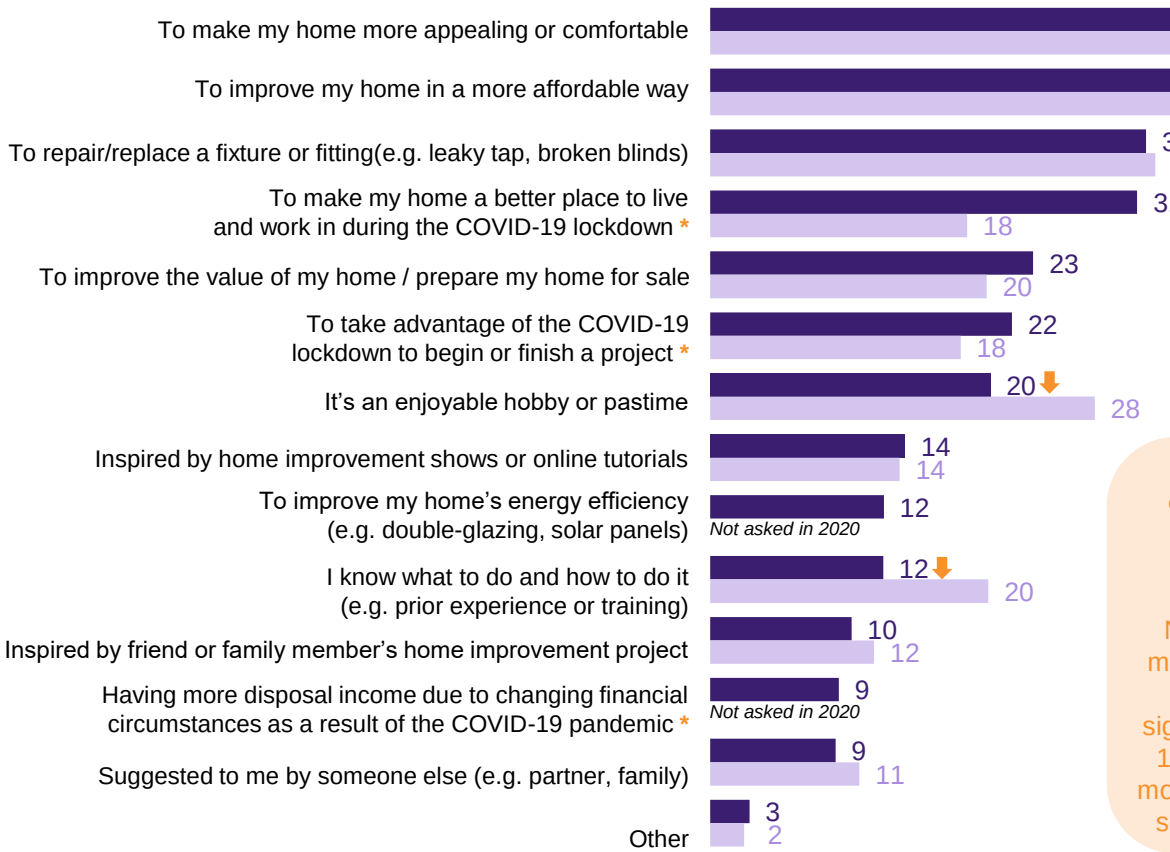
↓↑ *Statistically significantly lower or higher compared to just DIYers from the 2020 survey*

HOME IMPROVEMENT MOTIVATIONS

The most common motivations remain improving the appeal or comfort of the home. Pandemic-related reasons spurred on recent projects for 46% of all home improvers.

What made you consider your own home improvement project/s? – All improvers (%)



Segments more likely to have been motivated by pandemic-related reasons

NB: A nett 46% of all participants commenced a home improvement project due to a pandemic-related reason (where asterisked*).

Notably, the proportion who wanted a more comfortable home to live and work in during COVID-19 lockdowns is significantly higher than in 2020 (31% vs. 18% in 2020), whereas other shifts are more readily attributable to the broadened scope of the survey away from DIYers.

Q8. What made you consider your own home improvement project/s? Please select all that apply – including all completed, current or planned projects.

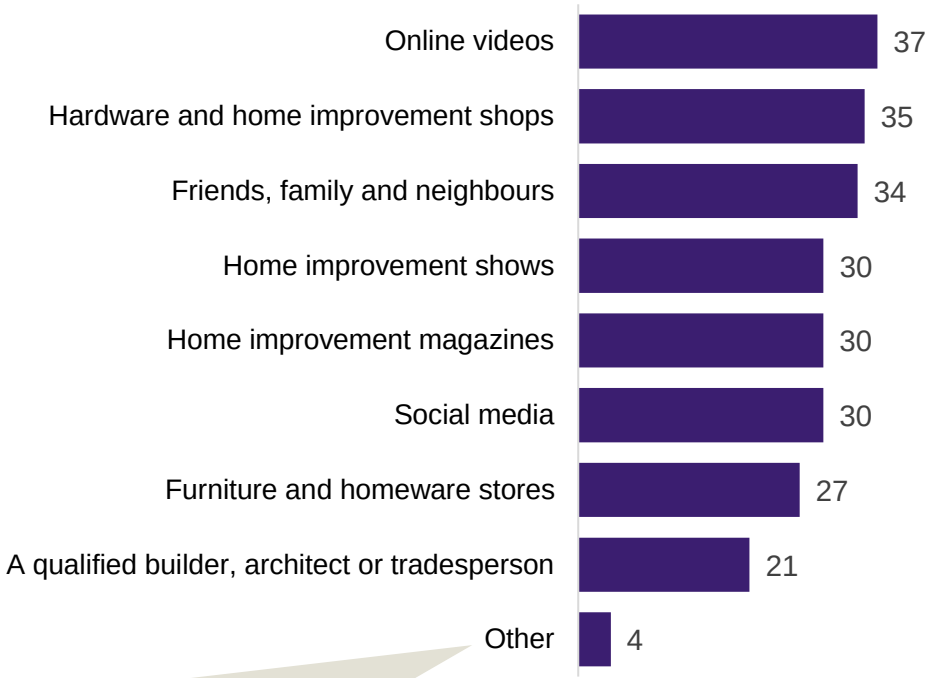
Base: All participants (n=1,506)

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

SOURCES OF INSPIRATION

Top sources of inspiration for home improvement projects are online videos, hardware shops, and people within one's immediate social circles. This is followed closely by home improvement shows / magazines, social media and furniture / homeware stores.

Sources of home improvement inspiration – All improvers (%)



One's own sense of style, experience, and simply knowing what was wanted or needed were often cited as other sources of inspiration *and* information.

Preferred inspiration sources by segment

33	37	73	51	22
27	29	63	36	39
33	38	55	33	29
28	25	66	37	22
22	28	58	36	29
34	41	59	39	5
26	29	59	35	14
14	18	32	20	27
1	1	2	1	11

Q30. Where do you tend to go for inspiration when it comes to home improvement projects?

Base: All participants (n=1,506)

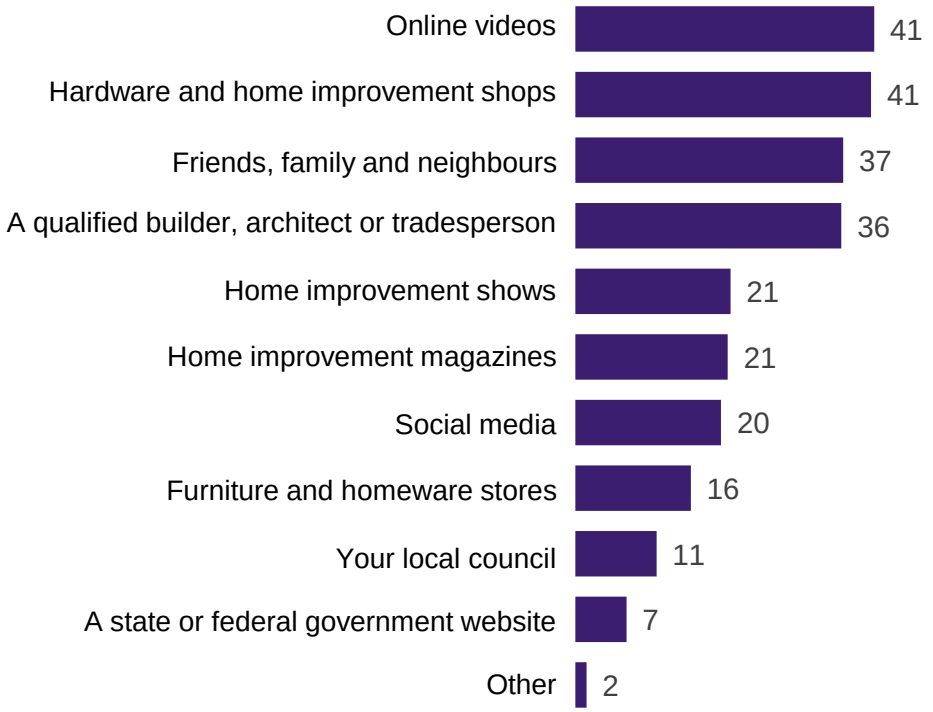
Significantly ***lower*** result than all other segments combined

Significantly ***higher*** result than all other segments combined

SOURCES OF INFORMATION

Home improvers are most likely to turn to the same places for information as they do for inspiration—though with the addition of qualified tradespeople forming a distinct top four. Government sources rank last, reinforcing the need for partners to generate cut-through.

Sources of home improvement information – All improvers (%)



Preferred information sources by segment

36	40	82	49	30
30	33	69	44	46
35	37	67	34	31
29	29	52	44	41
17	20	60	25	13
15	17	47	25	20
22	28	45	23	3
16	16	43	15	7
11	12	31	10	6
7	5	18	11	3
1	0	0	0	4

Q31. And where do you tend to go for information or advice on how to undertake home improvement projects?

Base: All participants (n=1,506)

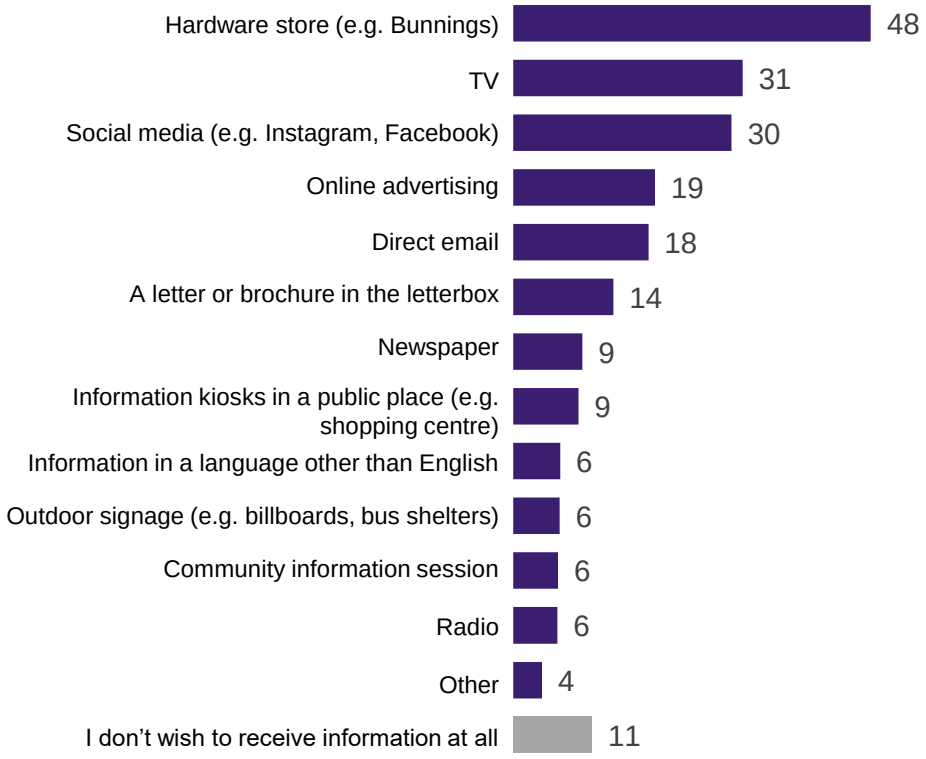
Significantly ***lower*** result than all other segments combined

Significantly ***higher*** result than all other segments combined

INFORMATION CHANNEL PREFERENCES

Almost half of all home improvers prefer to receive information through hardware stores, particularly Cautious Older OS. TV and social media are also important secondary avenues—the latter particularly so for MC Young Urbanites and FC Young Families.

Preferred way to receive home improvement information – All improvers (%)



Preferred information channels by segment

39	44	69	48	55
32	31	49	32	25
34	36	58	39	7
19	21	39	24	10
19	14	31	23	14
12	10	31	13	12
5	11	26	12	7
7	10	24	9	5
5	10	15	9	1
5	7	17	11	1
3	7	20	8	2
5	7	14	9	2
2	3	3	1	9
8	6	4	7	21

Q32. What's your preferred way of receiving this information about home improvement projects?

Base: All participants (n=1,506)

Significantly ***lower*** result than all other segments combined

Significantly ***higher*** result than all other segments combined

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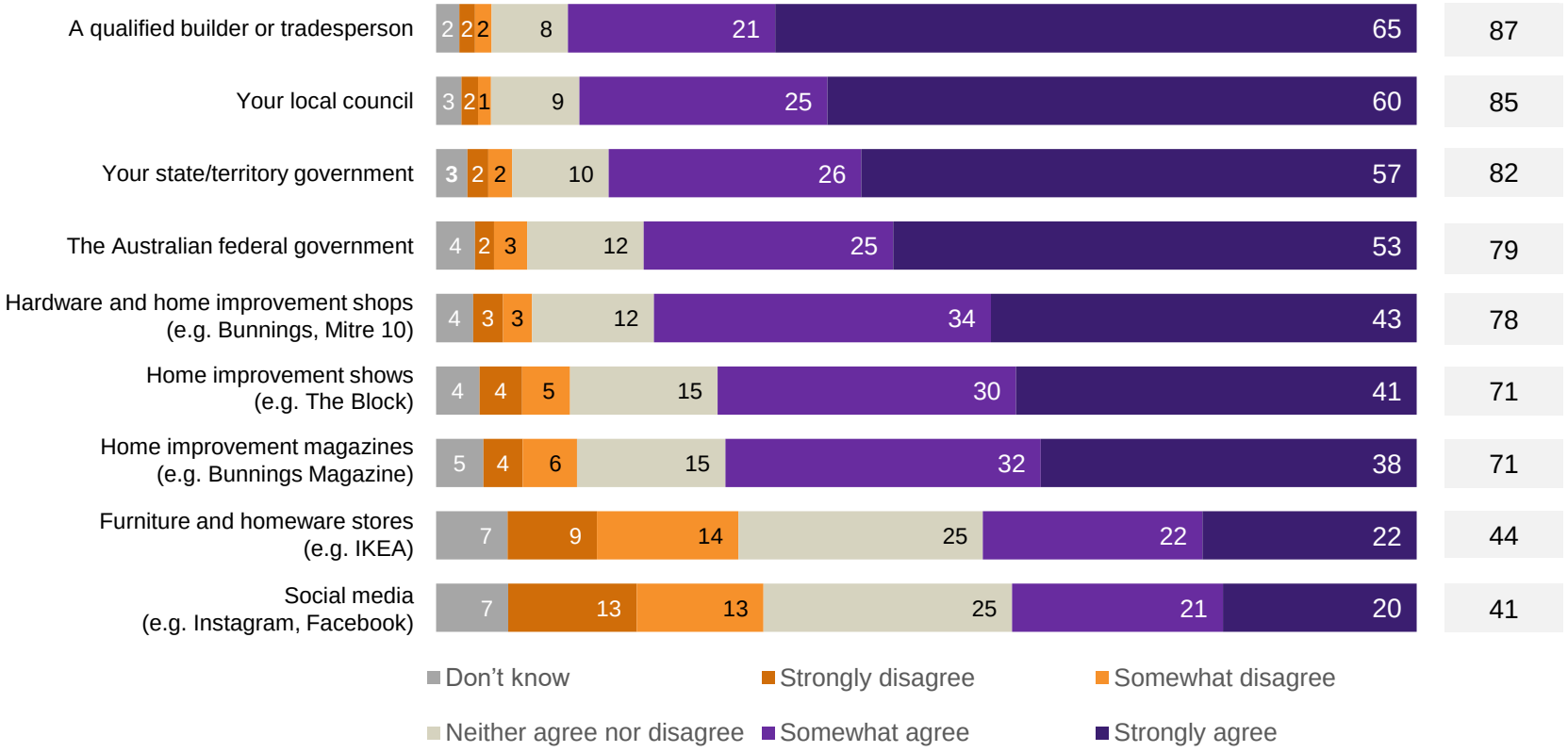
OBLIGATION FOR DISCLOSURE

Home improvers largely agree that qualified tradespeople, governments, hardware shops and home improvement shows / magazines all have a responsibility to provide asbestos safety information—with at least 71% agreeing in each case.

Level of agreement that the following organisations should be obliged to provide asbestos safety information for home improvement projects – All improvers (%)



Q38. To what extent do you agree or disagree that the following types of organisations should be obliged to provide asbestos safety information for home improvement projects?

Base: All participants (n=1,506)

ASBESTOS KNOWLEDGE, ATTITUDES AND DISPOSAL

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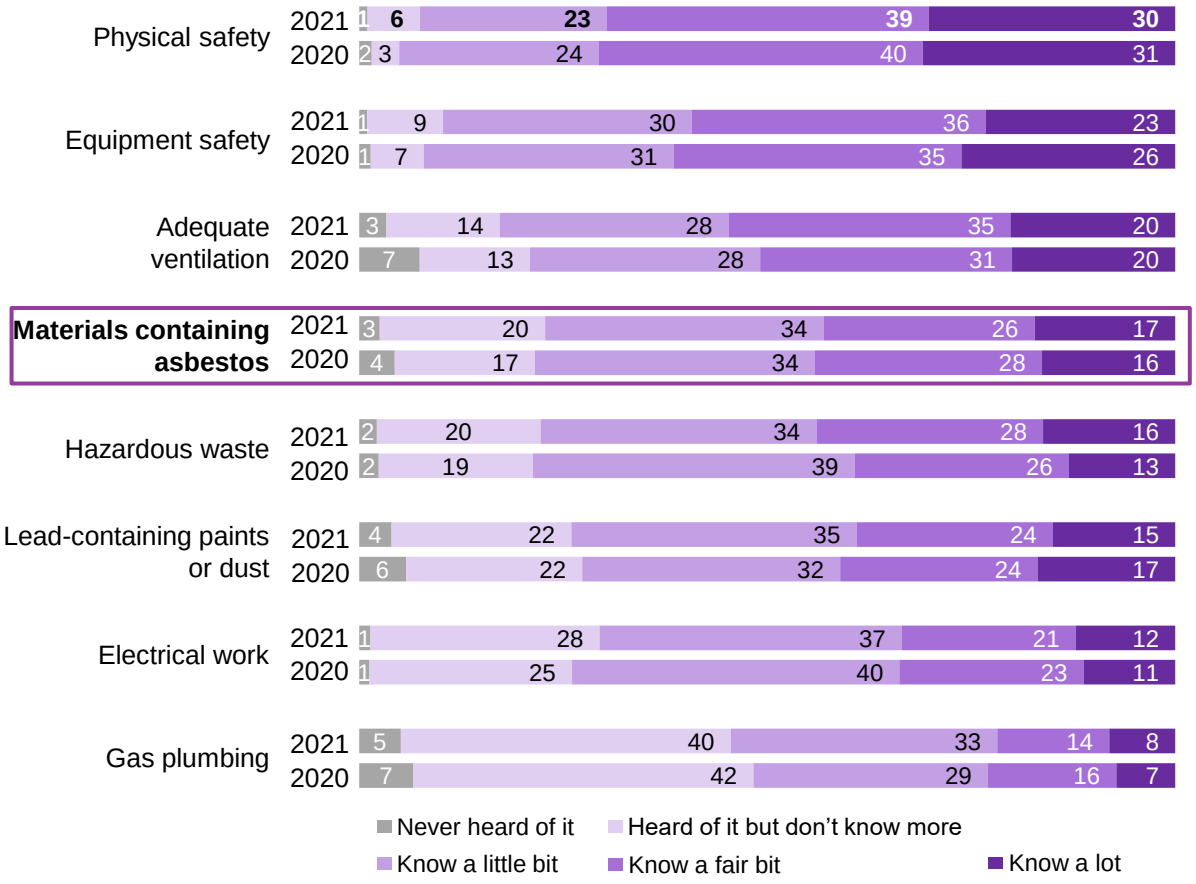
KNOWLEDGE OF RISK

Both prompted and unprompted knowledge levels remain on par with 2020 results, with low spontaneous mentions of asbestos as a potential risk and low self-reported knowledge.

Self-reported level of knowledges on the following risks (%)



Only 6% of home improvers spontaneously mentioned asbestos as a potential risk when planning a home improvement project.

This is on par with 5% in 2020.

NETT Know at least a little bit about asbestos (%)

2020	2021
78%	77%

More likely to say they've never heard of asbestos before or feel that they don't really know anything about it

Q9.What risks, hazards or safety issues do you typically consider when planning a DIY home project? // Q10. How much do you know about each of the following when it comes to home improvement projects? //

Base: All participants (n=1,506)

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

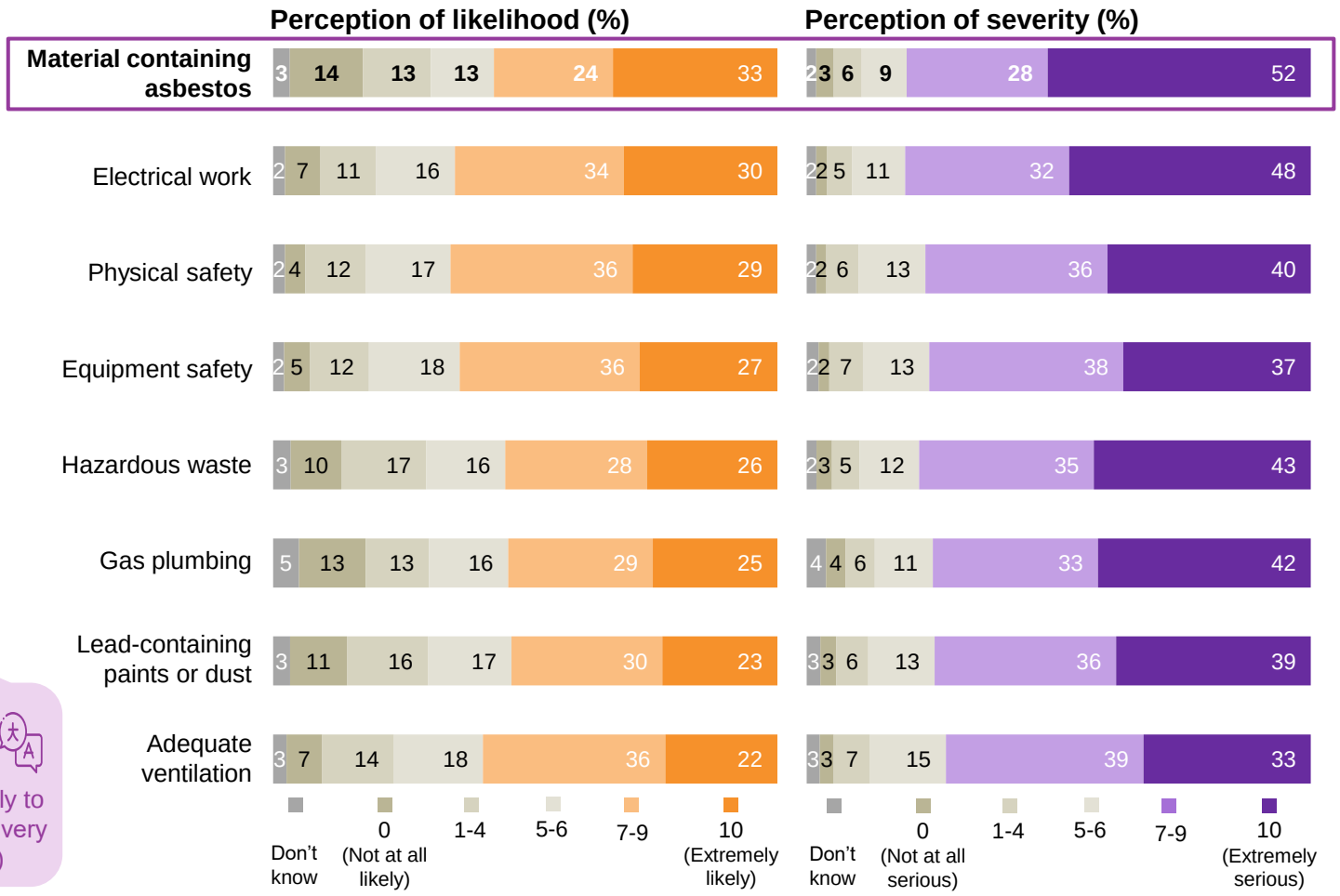
PERCEIVED LIKELIHOOD AND SEVERITY OF RISK

Compared to other potential risks, asbestos is seen to be less likely but more serious —though a third of those who think it's not very likely also think it's not very serious.

Only half (56%) thought there would be a likely risk of asbestos (rated 7+/10) on a project—though **four in five (80%) acknowledged the consequences would be serious** (rated 7+/10) if encountered.

Of those who thought asbestos was likely, 7% felt the consequence would be low (rated 0-6) – rising to 34% among those who thought asbestos was unlikely (rated 0-6).

These were more likely to think asbestos wasn't very serious (rated 0-6)

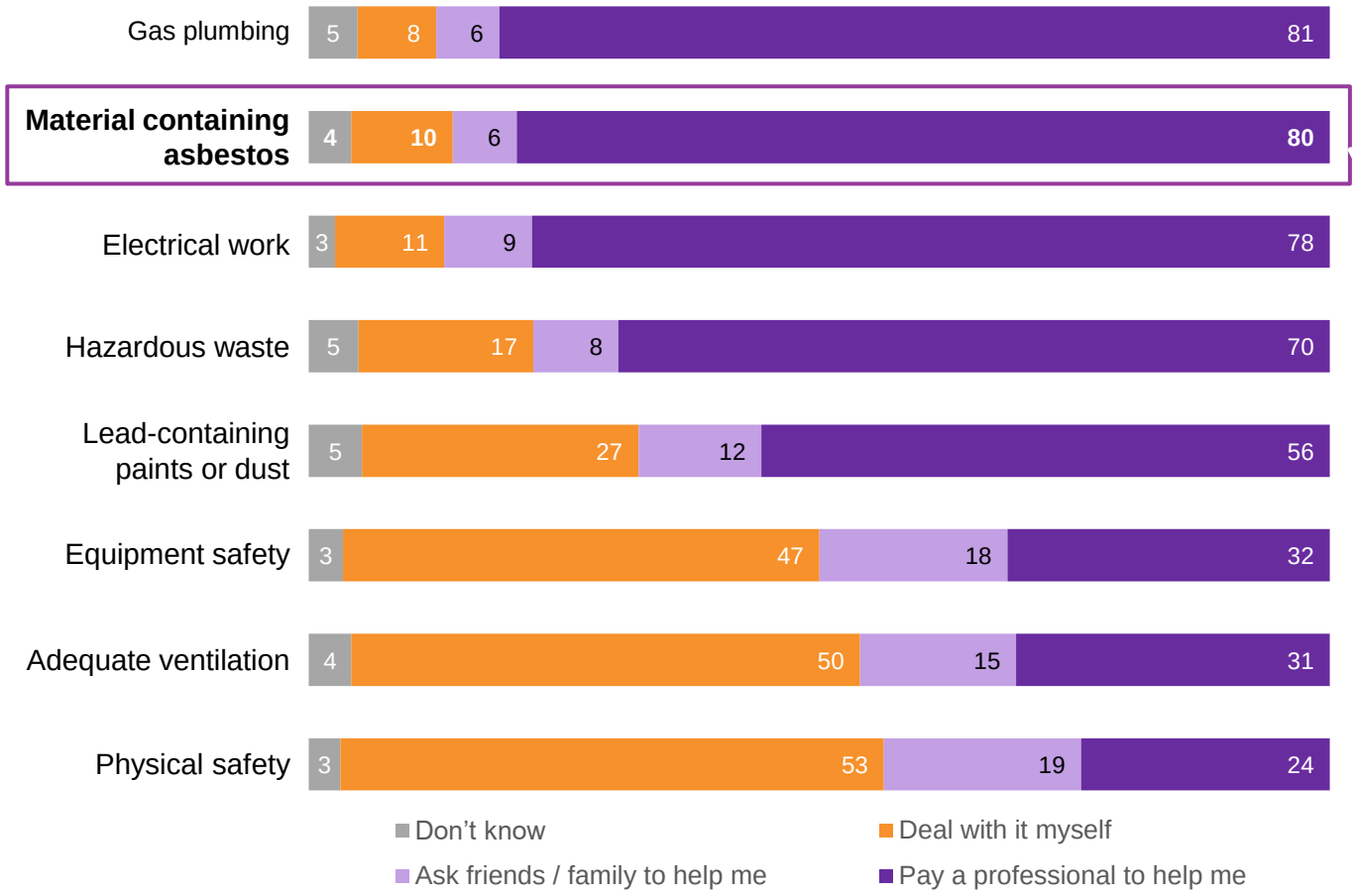


Q12B. When undertaking a home improvement project, how likely do you think each of the following would be a health and safety risk for you or others working on the project? // Q12C. And, if you encountered any of the following during a home improvement project, how serious do you think the consequences may be for you or others working on the project? // Base: All participants (n=1,002)

MANAGING RISKS

Reflecting findings from the 2020 survey, most home improvers say they would seek professional help to deal with asbestos—on par with gas and electrical work.

How home improvers would deal overall with the following during a project (%)



In 2020, 78% of DIYers said they would seek professional help to deal with asbestos— comparable to this 80% in 2021.

More likely to pay a professional to deal with asbestos

More likely to ask friends or family to help deal with asbestos

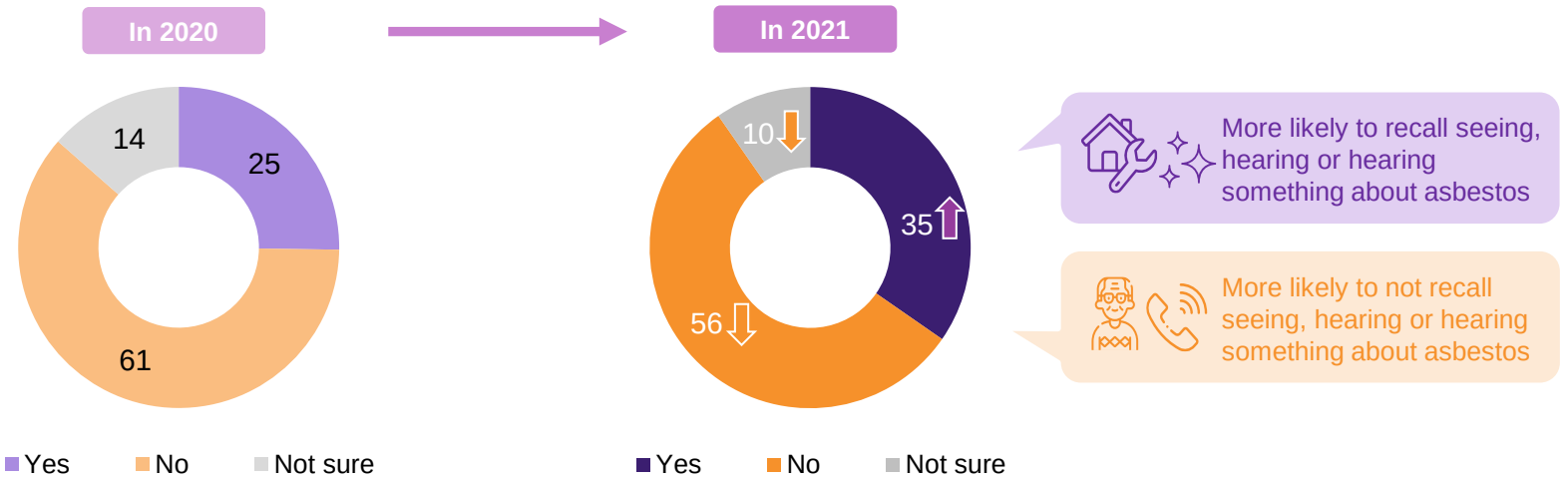
Q11B. In general, how would you deal with the following during a home improvement project – including checking, identifying, handling or disposing?
Base: All participants (n=1,006)

A complete collection of responses collected can be found in the data tables accompanying this report.

RECALL OF ASBESTOS INFORMATION

Prompted recall of any recent asbestos-related information has increased from 25% to 35%—mostly that it's dangerous, in old houses, and causes cancer or health issues.

Seen, heard or read anything about asbestos in the last 12 months... (%)



What they've seen, read or heard about asbestos...

"*I know it is a dangerous material, usually found in older homes made from fibro or asbestos cladding.*"

"*Asbestos is a real risk in older home renovations. There has been a lot of illegal dumping of asbestos according to media reports.*"

"*It could lead to cancer so always take professional help when removing anything with asbestos.*"

"*The Block mentioned risks and a family member of participants having asbestos cancer.*"

"*That you need to wear masks and hazard gears if you think there could be asbestos around and need to do a course to remove small pieces.*"

"*They have been finding up to 20 cases of asbestos related cases in a couple of Queensland primary schools of late.*"

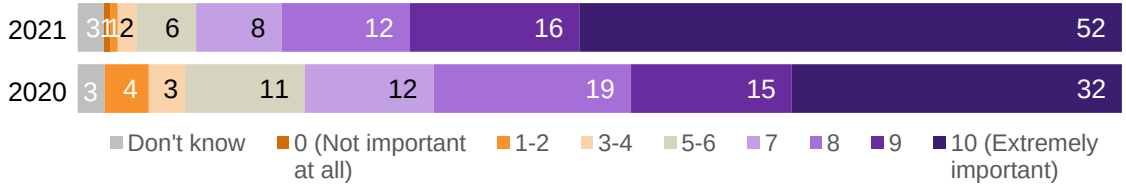
Q17. Have you seen, heard or read anything about asbestos in the last 12 months? // Q19. And in a few words, what did you see, hear or read about asbestos?
Base: All participants (n=1,506) // Base: Participants who have seen, heard or read anything about asbestos (n=515)

SENTIMENT TOWARDS ASBESTOS

Perceived importance of knowing how to manage asbestos has increased—though confidence remains low, with less than half sure about how to identify or manage it.

After considering a range of home improvement risks, participants rated…

The importance of knowing about managing asbestos in projects (%)

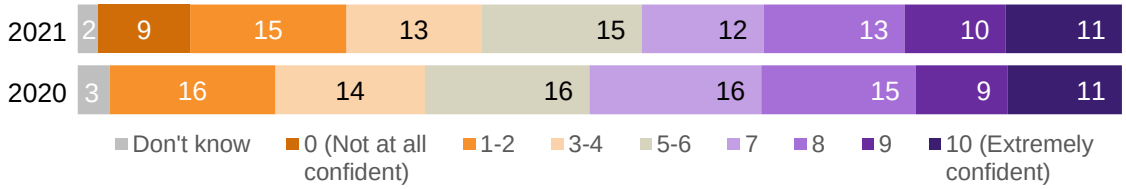


NET Important *(% rated 7+)*

2021	89 ↑
2020	78

More likely to feel that it is important to know about managing asbestos in projects

Confidence in their own ability to identify materials or situations that could potentially contain asbestos (%)

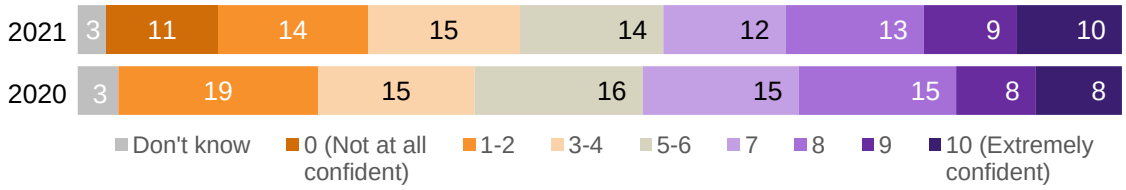


NET Confident *(% rated 7+)*

2021	46
2020	51

Less likely to feel that it is important to know about managing asbestos in projects

Confidence in their own ability to manage materials or situations where they or others could potentially be at risk of exposure to asbestos (%)



NET Confident *(% rated 7+)*

2021	44
2020	46

Confidence levels in ability to both identify and manage asbestos is consistent across all segments, suggesting knowledge and capacity gaps across the board.

Q24. How important do you feel it is for you to know about managing asbestos in home improvement projects? // Q25. How confident are you in your ability to identify materials or situations that could potentially contain asbestos during a home improvement project? // Q26. How confident are you in your ability to manage materials or situations where you or others could potentially be at risk of exposure to asbestos? // Base: All participants (n=1,506)

SECNewgate Research

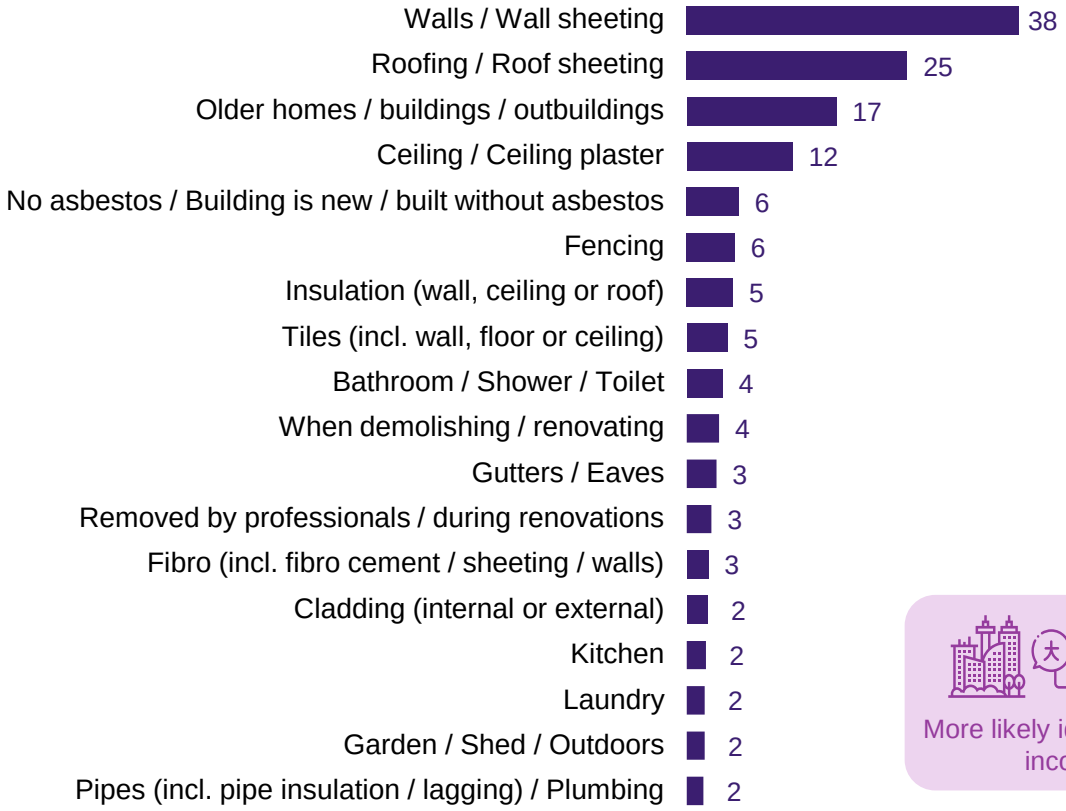
Statistically significantly lower or higher compared to just DIYers from the 2020 survey

Full prompted results can be found in the data tables accompanying this report.

IDENTIFYING ASBESTOS

Home improvers are most likely to presume that asbestos is found in walls, roofing, older buildings and ceilings. Even when prompted with a list of items that may contain asbestos, only two in three participants at most were able to correctly identify each item.

Unprompted suggestions of where materials containing asbestos could be encountered – All improvers, *Top unprompted mentions 2%+ only* **(%)**



When asked to identify items which might contain asbestos from a list, 92% identified at least one correct item.

However, only two-thirds at most were able to correctly identify any one item as potentially containing asbestos—most commonly walls (64%), roof insulation (52%), roof sheeting (44%) and outbuildings (42%).

Only a quarter or fewer were able to correctly identify textured paint and plaster (25%), fences (23%) or electrical switchboards (19%) as potential risks.

Around two in five (18%) also identified at least one incorrect item or material planted within the list.

More likely identify at least one incorrect item

More likely to identify correct asbestos items

Q35. Where would you expect to encounter material containing asbestos during a home improvement project? // Q36. Of the following list, which might involve material containing asbestos?
Base: All participants (n=1,506)

PROFESSIONAL ASSISTANCE

Only half of home improvers say they are likely to consider contacting a licensed asbestos professional for their next project, while around one in five report having done so before.

Responding to a new question, one in five (22%) said they've contacted a licensed asbestos assessor / removalist for advice.

Around three-quarters (73%) had never contacted a professional before, while 5% said they were unable to recall if they had.

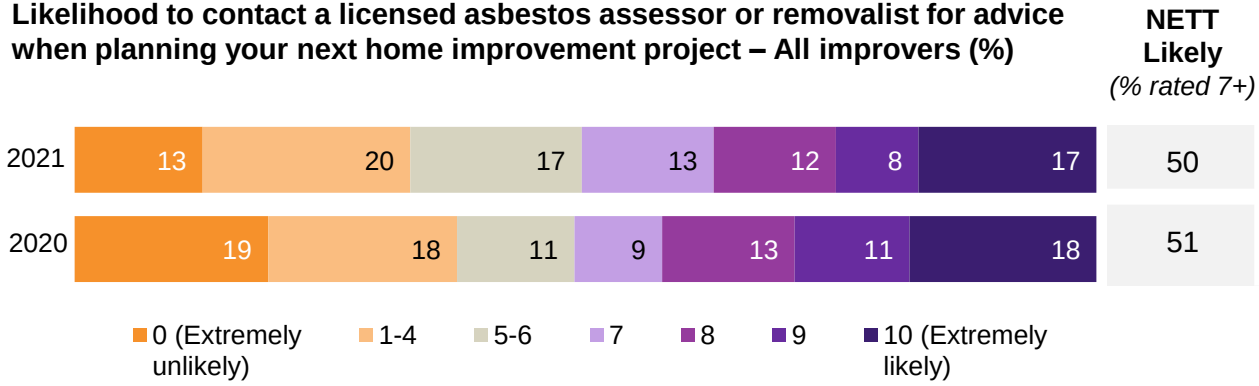
More likely to have never contacted a professional before

More likely to have asbestos training

One in ten home improvers said they have had training specifically in handling or removing asbestos.

Of these, the majority were training in working safely with ACMs (56%) or asbestos awareness training (53%)—followed by asbestos assessor training (23%), Class A asbestos removal (19%), and Class B asbestos removal (17%).

Likelihood to contact a licensed asbestos assessor or removalist for advice when planning your next home improvement project – All improvers (%)



More likely to have contacted a licensed asbestos specialist before, and to say they would contact one when planning their next home improvement project

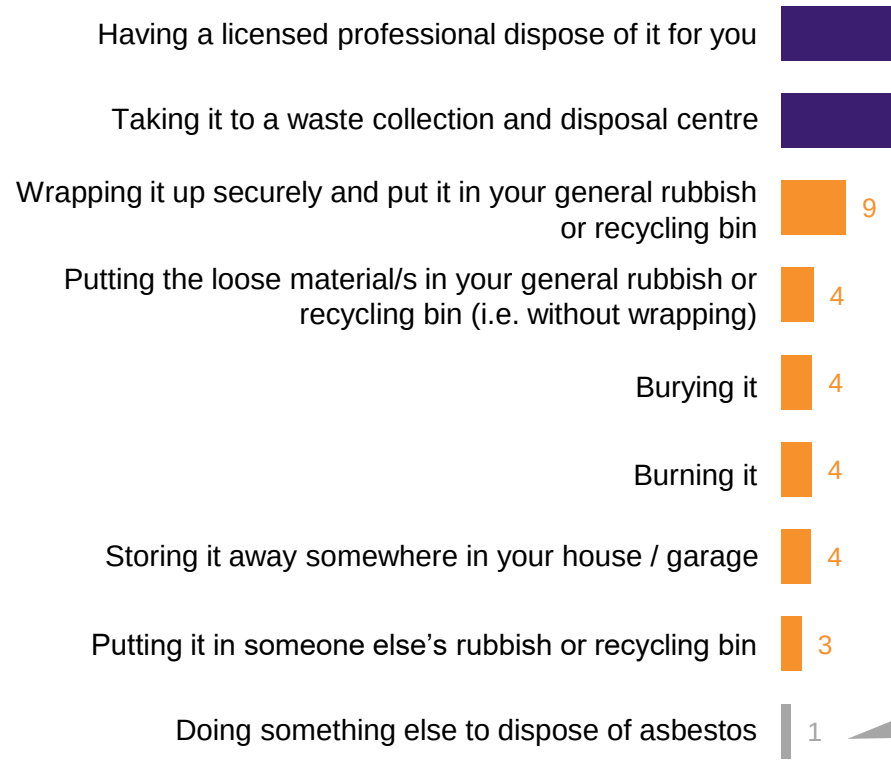
Q34. you ever contacted a licensed asbestos assessor or removalist for advice in the past? // Q20. When planning your next home improvement project, how likely are you to contact a licensed asbestos assessor or removalist for advice? // Q16. Have you ever undertaken any training specifically on asbestos handling or removal? // Q37. What training on asbestos handling or removal have you undertaken? // Base: All participants (n=1,506) // Those with asbestos training (n=147)

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

ASBESTOS DISPOSAL – IN THEORY

When prompted with a list of disposal methods, most home improvers correctly identified calling a professional and a quarter selected disposal centres. However, one in five also selected inappropriate disposal methods—mostly commonly placing it in curbside bins.

Ways people can dispose of asbestos, prompted – All current and past improvers (%)



At least **18%** of home improvers selected an **inappropriate disposal method for asbestos**

More likely to select an inappropriate disposal method *(whereas Well-heeled DIY Enthusiasts and Cautious Older Outsourcers were more likely to suggest appropriate methods)*

Other suggested methods included calling up council or building managers to dispose of the asbestos for you, hosing it down, or simply avoiding / not touching it.

Q33. In general, how can people who encounter asbestos during a home improvement project dispose of it? Please base this on both your own knowledge of what to do, as well anything you've seen, heard or read about others doing – and select all that apply.

Base: Participants who have ever completed or started a home improvement project (n=1,470)

ASBESTOS DISPOSAL – IN PRACTICE

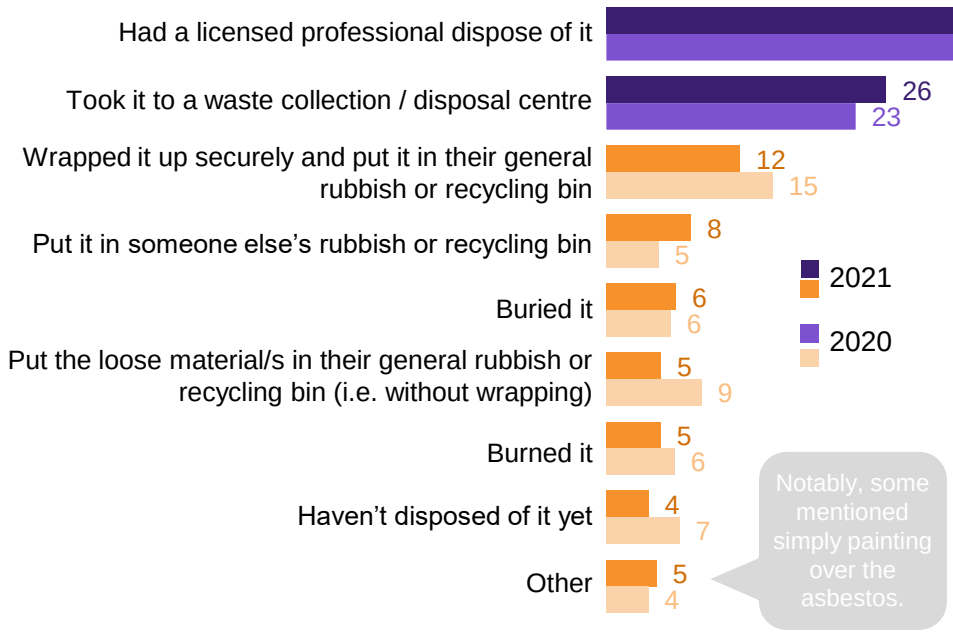
In practice, however, fewer people actually hired a professional—61% vs. the 83% outlined earlier. A greater proportion also confessed to actual inappropriate disposal—28% vs. 18%.

Of those with prior home improvement experience,

21% have encountered asbestos

This is on par with the 22% of DIYers who noted having previously encountered asbestos in their DIY projects in 2020.

How they've disposed of the asbestos they've encountered, prompted



Likely due to the expanded scope for the 2021 survey.

Notably, some mentioned simply painting over the asbestos.

At least **28%** of home improvers who have encountered asbestos admit to **inappropriate disposal methods**

Most likely of all segments to have used an inappropriate disposal method

Comparatively, 35% of DIYers had admitted to using an inappropriate disposal method in 2020.

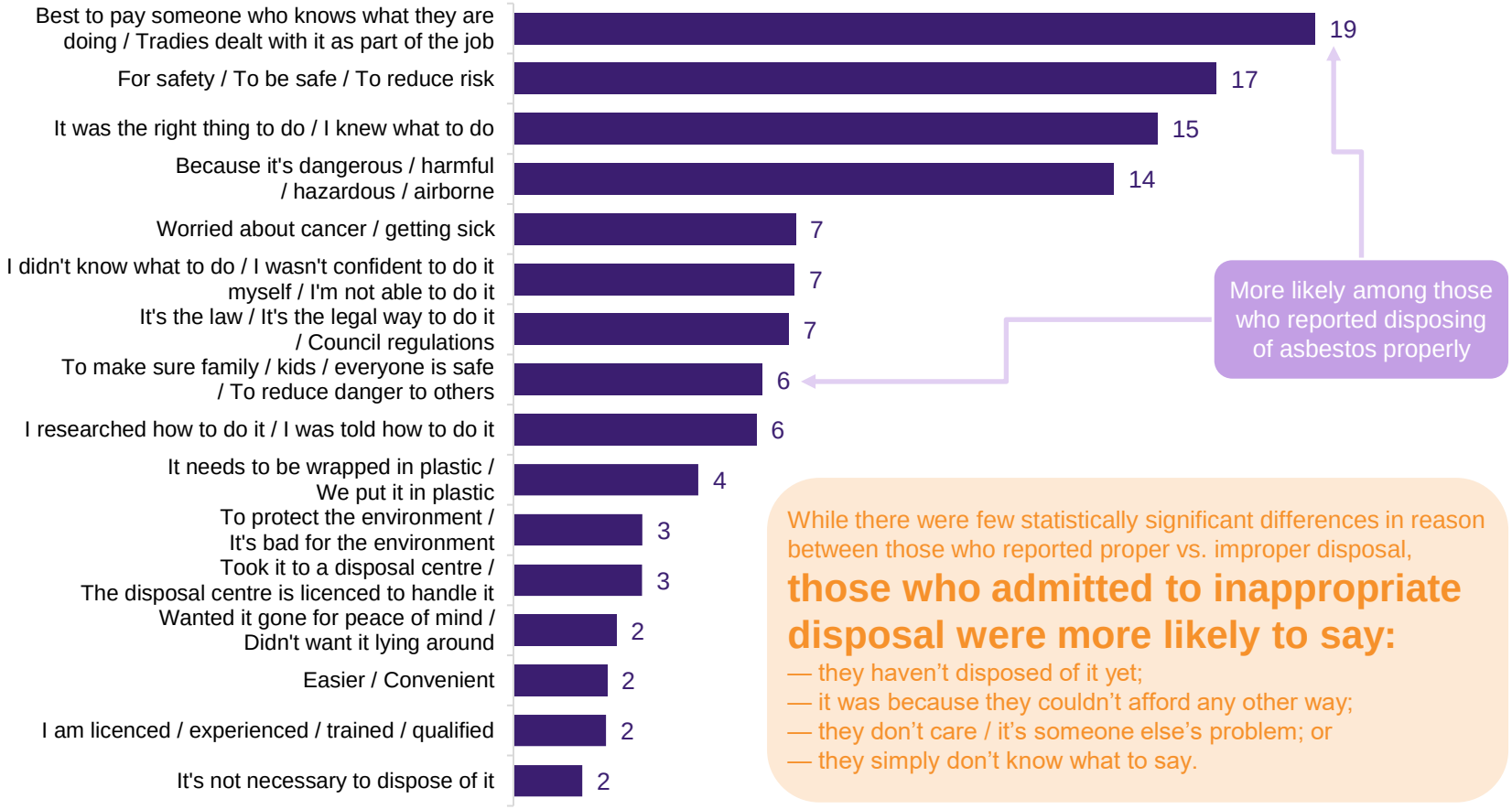
Q13. Have you ever encountered material containing asbestos during your home improvement project/s? // Q14. How did you dispose of the material containing asbestos you encountered? // Base: Participants who have ever completed or started a home improvement project (n=1,470) // Base: Participants who have encountered materials containing asbestos (n=298)

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

ASBESTOS DISPOSAL – STATED REASONS

There is remarkable consistency in rationale—suggesting those who admitted to inappropriate disposal may not always realise they were doing the wrong thing.

Reason for disposing of asbestos the way they have
– Those who have encountered asbestos, *Top unprompted mentions 2%+ only* **(%)**



While there were few statistically significant differences in reason between those who reported proper vs. improper disposal,

those who admitted to inappropriate disposal were more likely to say:

— they haven't disposed of it yet;
— it was because they couldn't afford any other way;
— they don't care / it's someone else's problem; or
— they simply don't know what to say.

Q15B. As best as you can recall, why did you manage the materials containing asbestos this way?

Base: Participants who have disposed of materials containing asbestos, excl. 'other' disposal methods (n=298)

MESSAGING, BEHAVIOUR CHANGE & FINAL ADVICE

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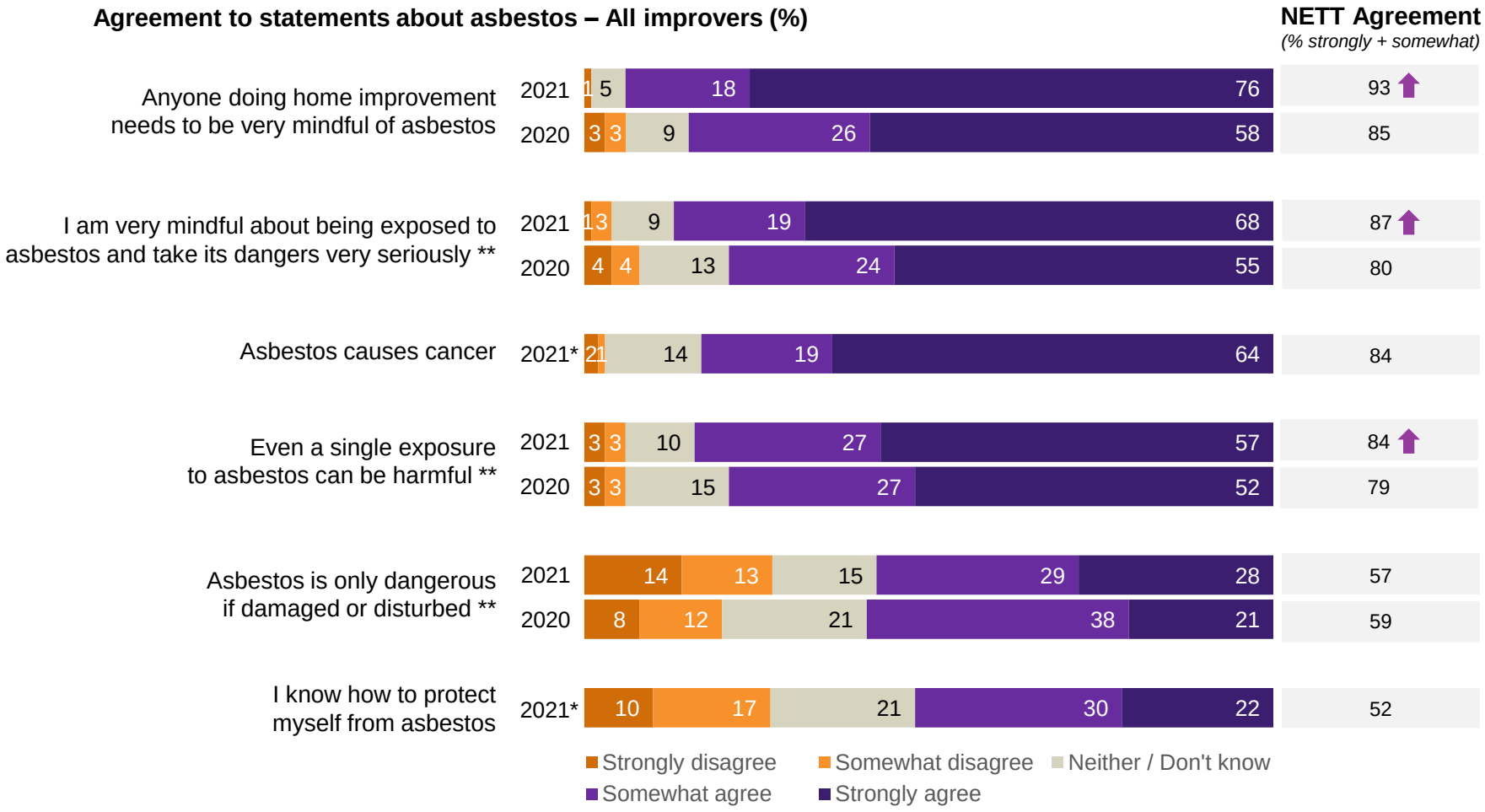
POSITIVE STATEMENTS TESTED

The vast majority agree that asbestos is dangerous, though there are mixed levels of understanding regarding how that danger manifests and how to protect themselves.

Agreement to statements about asbestos – All improvers (%)



Q22. For each statement, please indicate to what extent you agree or disagree // Base: All participants (n=1,506)

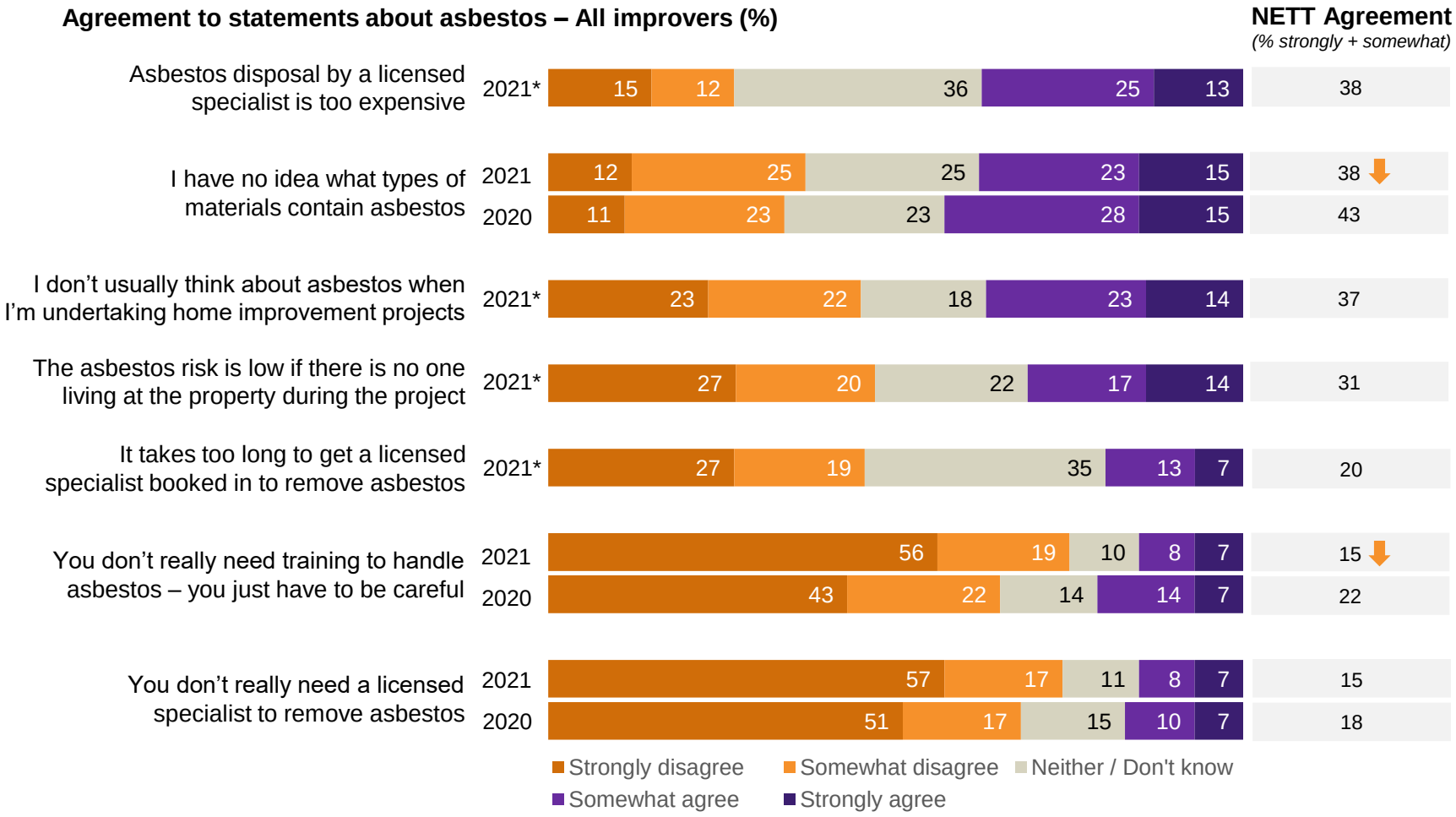
** Statement tested in 2021 survey only // ** Statement refined for 2021 survey*

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

NEGATIVE STATEMENTS TESTED

Nevertheless, a proportion of home improvers appear to maintain a sense that specialist handling of asbestos is too expensive, inconvenient or unnecessary.

Agreement to statements about asbestos – All improvers (%)



Q22. For each statement, please indicate to what extent you agree or disagree // Base: All participants (n=1,506)

** Statement tested in 2021 survey only // ** Statement refined for 2021 survey*

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

ASBESTOS ATTITUDES BY SEGMENTS

Financially Vulnerable DIYers and MC Young Urbanites are less likely to agree with the positive statements, while MCYUs are conversely more likely to agree with the negatives.

Statements – sentiment by segments *'somewhat' + 'strongly' agree (%)*	**ALL HOME IMPROVERS**					
Anyone doing home improvement needs to be very mindful of asbestos	**93**	91	88	94	96	98
I am very mindful about being exposed to asbestos and take its dangers very seriously **	**87**	83	79	92	91	94
Asbestos causes cancer	**84**	77	78	87	89	90
Even a single exposure to asbestos can be harmful **	**84**	77	80	89	85	91
Asbestos is only dangerous if damaged or disturbed **	**57**	52	52	55	61	65
I know how to protect myself from asbestos	**52**	50	49	58	61	50
Asbestos disposal by a licensed specialist is too expensive	**38**	35	43	41	44	32
I have no idea what types of materials contain asbestos	**38**	41	46	34	40	29
I don't usually think about asbestos when I'm undertaking home improvement projects	**37**	39	42	34	42	31
The asbestos risk is low if there is no one living at the property during the project	**31**	28	41	33	35	23
It takes too long to get a licensed specialist booked in to remove asbestos	**20**	19	28	22	26	12
You don't really need training to handle asbestos – you just have to be careful	**15**	16	24	12	22	5
You don't really need a licensed specialist to remove asbestos	**15**	17	22	14	19	6

Q22. For each statement, please indicate to what extent you agree or disagree // Base: All participants (n=1,506)

*** Statement refined for 2021 survey*

Significantly ***lower*** result than all other segments combined

Significantly ***higher*** result than all other segments combined

A complete collection of responses collected can be found in the data tables accompanying this report.

FINAL ADVICE TO ASEA AND THE GOVERNMENT

At the end of the survey, participants were asked to offer advice on how to help the community better identify and manage asbestos risks. Many reiterated the need for greater awareness—via advertising and information hubs, and at points of purchase.

"More advertising is needed to make people aware of this dangerous hazard."

"Provide a list of all products likely to contain Asbestos and help to identify it for those who are unsure."

"Produce information messages on various media, especially when and where home renovations are discussed or shown, with links to government websites for further information."

"Information should be available at all purchase points of home improvement outlets."

"Continue doing these surveys to help educate others about asbestos risks in home DIY projects and give out brochures to stores like Bunnings to educate people."

"More information on TV and online about what is required to remove and dispose of asbestos."

"Use social media to communicate the dangers of asbestos."

"I would like some form of pamphlet on asbestos safety and procedures to be available at stores like Bunnings and at council offices in rural areas."

"Provide online learning modules on what to look out for and how to deal with asbestos."

"I suppose by advertising on the TV, papers, on Facebook, etc. and radio every month."

"Target areas with older homes which are likely to have asbestos and be renovated. Then do appropriate ad advertising, perhaps a note with council rates or billboards."

Q29. What advice would you give ASEA and the Australian Government on how to help the community better identify and manage asbestos risks in DIY home renovations? // Base: All participants (n=1,002)

APPENDICES

SECNewgate Research

BACKGROUND, OBJECTIVES AND METHODOLOGY

SECNewgate Research

BACKGROUND

The Asbestos Safety and Eradication Agency (ASEA) was established in 2013 to coordinate national actions to improve asbestos awareness and the effective and safe management, removal and disposal of asbestos. Working with all levels of government, its aim is to prevent exposure to asbestos fibres in order to eliminate asbestos-related diseases in Australia.

Following the introduction of COVID-19 lockdown restrictions across Australia in March 2020, ASEA commissioned SEC Newgate to conduct a quantitative survey to refresh its understanding of home improvers in the COVID-19 context. Building on media coverage which suggested a boom in DIY upgrades, the survey focused specifically on DIY home renovators—a cohort of notable concern for encountering asbestos as indicated by previous research from ASEA.

Since the findings of the 2020 report, extended COVID-19 lockdown restrictions have seen continuing high demand in general community undertaking home improvement projects. As a result, ASEA has commissioned SEC Newgate Research to undertake a follow-up survey to track changes in awareness and attitudes towards asbestos and its dangers.

Noting the overall surge in interest towards home improvement, the follow up survey has expanded its scope to include all approaches to home renovation and improvement—including outsourcing to family, friends and professionals.

OBJECTIVES

Building on the findings from the 2020 report, ASEA's primary research objective continues to be to explore the impacts of the COVID-19 pandemic on home improvements behaviours—and what this means for public health and safety outcomes.

Specifically, this research explored and measured:

- the proportion of Australian households undertaking or considering home improvement projects, and their approaches (DIY vs. outsourcing);
- motivations, inspiration and information preferences for undertaking home improvement work and the impact of these on risk assessment, decision-making and behaviours;
- awareness, understanding and approaches to research and planning for potential risks when undertaking a home improvement project – including where asbestos sits within the overall hierarchy of risk;
- any shifts in awareness and personal attitudes and behaviours regarding asbestos;
- overall impact of refined asbestos attitudinal statements on behaviour; and
- key segmentation of home improver profiles based on demographic traits, motivations for home improvements, and attitudes towards asbestos management.

NOTES TO THE READER

When interpreting findings in this report, please note:

- The base (number and type of respondents asked each question) and the actual survey questions are shown in the footnote.
- Quotas were set for age, gender and place of residence based on population-representative Census proportions, with prospective survey participants then screened out if they were not inclined to undertake any home improvement projects.
- Quota results were then weighted back to Census proportions to account for any sampling bias, yielding population-adjusted proportions for age, gender and place of residence among home improvers.
- These proportions were ultimately used to weight the final survey results, ensuring findings are representative of all home improvers across the Australian adult population.
- All survey results have been examined for statistically significant differences between segments and sub-groups, where meaningful in the context of the question. Where differences have not been noted, it should be assumed that no differences existed or were noteworthy.
- Comparisons to Wave 1 - 2020 results have been noted where relevant, though this must be done with caution given the sample composition has been broadened in Wave 2 - 2021.
- Throughout the report, the term ‘nett’ has been used where coded survey responses from a similar group or that are similar in nature are grouped into one overarching theme (e.g. ‘strongly agree’ and ‘somewhat agree’ netted as ‘agree’).
- Survey results may not always total 100% due to rounding or multiple-response questions.
- To ensure data reliability, survey results are typically only shown when the base size is at least n=30. Results with lower base sizes, where used, should be interpreted with caution and treated as indicative.

FULL METHODOLOGY DISCLOSURE STATEMENT

This research was conducted by Newgate Research on behalf of the Asbestos Safety and Eradication Agency between 20-30th August.

The target population for the research was Australian adults who had completed, are currently working on, or planning to undertake at least one home improvement project.

The research comprised a 15-minute self-complete online survey with n=1,506 participants.

Survey participants were sourced from databases via the Lucid marketplace.

Participation was on a voluntary, opt-in basis.

Weighting was applied to the survey dataset to more accurately reflect the target population, using rim weighting (or raking).

The data set was weighted to match population data from the Australian Bureau of Statistics' Census 2016 by location, age and gender. The weighting approach was consistent with that used in the 2020 study.

Weighting efficiency was around 90% for most survey estimates. That is, the effective sample size for most estimates was around 90% of the actual sample size (i.e. [n=1,356] for estimates made on the total sample). Using the effective sample size, the maximum margin of error for estimates made on the total sample is +/- 2.5%.

The full question wording used in the survey is included within the report. For multiple choice questions and statement grids, the order of response options and statements was randomised to avoid potential order effect.

The research was undertaken in compliance with the Australian Polling Council Code of Conduct which can be viewed here: https://www.australianpollingcouncil.com/code-of-conduct

PARTICIPANT PROFILE

SECNewgate Research

PARTICIPANT PROFILE

AGE	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
18-34	31	309	31	474
35-54	33	334	33	504
55+	36	359	35	528

GENDER	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Male				
Female				

LOCATION – STATE	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
NSW	33	326	32	485
VIC	26	256	26	399
QLD	20	201	20	301
WA	11	106	10	153
SA	7	71	7	106
TAS	2	21	2	30
ACT	2	17	2	25
NT	0	4	0	7

LOCATION – LOCALITY	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Capital city – CBD or inner suburbs	21	206	20	307
Capital city – suburban or outer metro	48	483	47	712
Regional city or town	24	238	25	369
Rural or remote country area	7	75	8	118

HOME TYPE	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
A larger house (e.g. with a garden and/or swimming pool)	56	560	59	891
A smaller house (e.g. terraces, townhouses, semi-detached)	26	261	25	382
An apartment or unit	16	162	13	190
Other	1	15	2	33
Prefer not to say	0	4	1	10

Unweighted proportions and base sizes shown

SECNewgate Research

Statistically significantly lower or higher compared to just DIYers from the 2020 survey

PARTICIPANT PROFILE *CONT'D*

HOME OWNERSHIP	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Owning it outright	35	352	36	549
Paying off a mortgage	35	352	31	468
Renting	23	233	25	381
Living rent-free (e.g. with parents)	5	50	5	78
Other	1	6	1	18
Prefer not to say	1	9	1	12

EDUCATION	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Primary school	1	6	1	18
High school	24	241	29 ↑	443
Trade or technical degree	25	252	25	369
Undergraduate degree	30	305	25 ↓	377
Postgraduate degree	17	169	17	249
Other	2	16	3	38
Prefer not to say	1	13	1	12

HOUSEHOLD STRUCTURE	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
I live on my own	16	159	15	231
Couple, never had children	15	148	12	174
Single/couple, all children left home	19	190	20	308
Single/couple with child/ren under the age of 5 living at home	11	108	14	209
Single/couple with child/ren under the age of 6-11 living at home	14	143	13	193
Single/couple with child/ren under the age of 12-17 living at home	13	127	13	196
Single/couple with child/ren under the age of 18+ living at home	11	111	11	171
Share house	6	61	7	107
Other	2	17	3	46
Prefer not to say	2	18	1	19

Unweighted proportions and base sizes shown

PARTICIPANT PROFILE *CONT'D*

EMPLOYMENT STATUS	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Employed full time (or equivalent hours)	39	394	37	562
Employed part-time (or equivalent hours)	17	166	18	264
Self-employed / business owner	7	73	6	93
Unemployed / looking for work / receiving JobSeeker payments	4	39	5	68
Temporarily stood down / receiving JobKeeper payments	1	10	1	16
Home duties / homemaker	7	70	7	111
Studying (and not working)	2	22	3	40
Retired	20	198	21	314
Other	2	19	2	26
Prefer not to say	1	11	1	12

ANNUAL HOUSEHOLD INCOME (BEFORE TAX)	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
No income	1	9	1	20
Under $20,000	6	56	5	77
$20,000 - $39,999	15	149	16	236
$40,000 - $59,999	16	158	16	234
$60,000 - $79,999	14	142	14	218
$80,000 - $99,999	11	113	11	171
$100,000 - $119,999	10	98	8	122
$120,000 - $149,999	9	92	9	143
$150,000 - $199,999	7	66	8	128
$200,000 or more	5	48	4	66
Prefer not to say	7	71	6	91

Unweighted proportions and base sizes shown

PARTICIPANT PROFILE *CONT'D*

OTHER CHARACTERISTICS	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Has at least one parent born overseas	34	338	33	490
Speak a language other than English at home	9	89	9	133
Migrated to Australia within the last 10 years	9	94	7	107
Identify as Aboriginal or Torres Strait Islander	3	29	4	59
None of the above	53	536	57	855

FINANCIAL CIRCUMSTANCES	Wave 1 - 2020		Wave 2 - 2021	
	%	n	%	n
Having a lot of difficulty covering basic living expenses	*N/A*	*N/A*	8	115
Having some difficulty but just making ends meet	*N/A*	*N/A*	21	309
Doing okay and making ends meet	*N/A*	*N/A*	43	649
Doing well and feeling comfortable	*N/A*	*N/A*	26	394
Prefer not to say	*N/A*	*N/A*	3	39

Unweighted proportions and base sizes shown

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