

Executive summary

Background

In 2014, the Asbestos Safety and Eradication Agency (ASEA) conducted a nationwide baseline survey to assess community awareness, understanding and attitudes towards asbestos in the domestic built environment - this is known as Survey 1. In 2016, ASEA commissioned EY Sweeney, to provide an updated assessment of the community's awareness levels of asbestos (Survey 2). The findings from this study will be used to monitor awareness levels and attitudes towards asbestos within the community as well as highlight any gaps.

Methodology

To ensure comparability between Survey 1 and Survey 2 research, the same contact methodology was used along with a similar sample structure and survey questions. In Survey 2, the study engaged 1,125 members of the Australian general population, 848 DIY home renovators and 130 real estate agents or landlords via an online survey. The research also consulted 402 tradespeople using a telephone survey approach. All participants in the research were randomly selected and invited to participate (not self-selected).

Fieldwork took place between and 3 May and 26 May 2016. 100 pilot interviews were conducted across all four audiences prior to the live launch.

Key findings

General population

There is widespread recognition of the importance of being knowledgeable about asbestos and its dangers. However, actual knowledge and the perception of being informed has moderated.

- ▶ In 2016, around three quarters of Australians (76% in both Survey 1 and 2) felt it was important to be knowledgeable about asbestos and its dangers. Positively, the depth of this conviction has hardened since Survey 1 with 43% strongly agreeing (Survey 1) compared to 52% in Survey 2
- ▶ However, the perception of being informed about asbestos has softened slightly since Survey 1 with 52% (Survey 1) saying they felt informed vs. 47% (in Survey 2). Similarly, 53% said they felt knowledgeable in Survey 1 compared to 49% in Survey 2
- ▶ DIYers experienced the greatest decline in perceptions of being informed and feeling knowledgeable with 62% stating they felt informed in Survey 1 compared to 49% in Survey 2. 67% felt knowledgeable in Survey 1 compared to 53% in Survey 2. In addition to this, fewer DIYers felt that knowledge of asbestos and its dangers were important (87% Survey 1 vs. 78% Survey 2)
- ▶ Also of concern is the attitudes of younger Australians (those aged under 50 years of age) and in particular the lower level of importance they place on knowledge of asbestos (84% of those aged 50+ years felt knowledge was important compared to 70% of those under 50 years). Younger Australians have substantially lower levels of knowledge and feel less informed about asbestos compared to their older counterparts (62% of those aged 50+ felt knowledgeable compared to 40% of those under 50 years, 59% of those aged 50+ felt informed compared to 40% of those under 50 years). These findings are of particular concern as this younger group is becoming more engaged in DIY (albeit more likely to conduct DIY on newer housing stock, i.e. post 1990), and an awareness of the dangers of asbestos when conducting DIY is critical

- ▶ Those who speak a language other than English at home rate their knowledge of the dangers associated with exposure to asbestos notably lower than those who speak only English (39% who speak another language vs. 53% who only speak English). In addition to this, the degree to which they feel informed about asbestos and its related dangers is also lower than those who speak only English (36% who speak another language vs. 50% who only speak English). Suggests that consideration should be given to the roll out of an education program targeted at non-English speaking backgrounds
- ▶ In addition to this, of cause for concern are attitudes expressed by Real Estate Agents / Landlords that felt Asbestos is not a major concern for them (40%). This issue is discussed in more detail later in this summary

Whilst the majority of Australians claim they would pay for specialist advice if they were unsure if something contained asbestos (78%), this proportion has declined notably since Survey 1 (87%).

- ▶ Of most concern, is the decline in willingness to pay for specialist advice amongst DIYers (88% Survey 1, 80% Survey 2), which, when linked with the declines in importance and knowledge, highlights the need for education considering these people are most at risk of exposure to asbestos (after tradespeople)
- ▶ Amongst Real Estate Agents / landlords, willingness to pay declined indicatively (84% Survey 1, 77% Survey 2) whilst amongst tradespeople willingness to pay indicatively increased (73% Survey 1, 77% Survey 2)
- ▶ Interestingly, older Australians (those aged 50+) are more likely to pay for specialist advice (83% Survey 2) than those under the age of 50 (76% Survey 2). Again highlights the need to further educate younger Australians on the potential dangers of asbestos exposure

Tradespeople

Positive attitude towards asbestos remained largely consistent across the surveys.

- ▶ This group has the strongest awareness of the dangers of asbestos across all key audiences included in this research. While the other three audiences experienced a softening in some attitudes towards asbestos, tradespeople have conversely seen a positive uplift in some of their attitudes
- ▶ Almost all reported their business/organisation take asbestos and its dangers seriously (93% Survey 1, 95% Survey 2). Similarly, employees also reported that they are positively discouraged to take any risks on a job site when asbestos is involved (94% Survey 1, 94% Survey 2)

Tradespeople would like more training.

- ▶ Despite the high level of awareness, tradespeople are increasingly concerned about asbestos exposure. In 2016, they are significantly more likely to indicate they are concerned about being exposed to asbestos compared to 2014 (58% Survey 1, 65% in Survey 2)
- ▶ This concern may also be due to a lack of professional training. Only 1 in 2 (55% Survey 2) claim to have sufficient training about how to identify and manage asbestos on the job. Around 1 in 3 tradespersons indicated that additional asbestos training would be beneficial (29% Survey 1, 32% Survey 2). This desire for additional training is similar whether they had undertaken any formal training or not

- ▶ In 2016, those who indicated they would like additional training indicated that peak bodies and asbestos specialists would be best placed to deliver this training. Interestingly, significantly fewer felt that training through an external organisation would be useful this time around (32% Survey 1, 14% Survey 2)
- ▶ Potentially, AESA could conduct a review of available training courses and evaluate the quality of the information that is provided. Alternatively, AESA could consider conducting further research with participants of external training courses to understand where they feel more information is required

DIY Home Renovators

Of all four audiences included in the research, DIY home renovators experienced the largest negative shift in awareness and attitudes towards the dangers of asbestos

- ▶ In previous research, AESA identified this segment at most risk, after tradespeople. The findings from this survey confirm this and highlight a pressing need to address the softening in awareness and sentiment amongst DIY home renovators

According to the Australian Bureau of Statistics (ABS), there has been an increase in the number of home DIY renovations since 2014. However, the AESA research shows a decline in renovations amongst properties built before 1990 (those with a higher chance of asbestos)

- ▶ In Survey 1, 38% of DIY home renovation enthusiasts reported having undertaken some form of home renovation in properties built before 1990. In Survey 2, this declined significantly to 31%
- ▶ The difference between ABS and AESA data lies in the definitions of DIYers. ABS data takes into account all renovations (including those by a professional builder) on all age houses - however, the AESA study only takes into account a specific sub-group of DIYers i.e. houses built prior to 1990
- ▶ Whatever the reason for the differences in the numbers, the results imply that there is a greater need to educate and raise awareness amongst this DIY home renovators segment, particularly those renovating older properties

Younger generations are showing more interest in DIY home renovations

- ▶ Indicatively, the research shows that there are more younger generations interested in DIY in 2016 than in 2014 - particularly those under the age of 30 (8% Survey 1, 27% Survey 2)
- ▶ This does pose a concern, as the research also shows that younger generations are less likely to be aware of asbestos and its dangers than older generations. Targeted awareness and education campaigns therefore need to be aimed not just at the DIY home renovations market, but also at the younger cohort. This could potentially be achieved through using young ambassadors who can speak directly to generation x, to promote the use of asbestos inspections prior to conducting renovations

Whilst there has been an increase in the proportion of renovations being completely outsourced to tradespeople, the majority either partially conduct DIY and outsource the rest or fully renovate themselves - either way, the DIY component exposes renovators to the risks of asbestos.

- ▶ There has been a slight increase in the proportion of home renovations being outsourced entirely to professional tradespeople (18% Survey 1, 24% Survey 2). However, there is still a large proportion of DIYers who continue to undertake home renovations themselves either with or without assistance from professional tradespeople (81% Survey 1, 74% Survey 2)
- ▶ About half of DIYers do not conduct a risk assessment for asbestos prior to commencing renovations (44% Survey 1, 47% Survey 2). This proportion has remained consistent across Survey 1 and Survey 2
- ▶ Over 1 in 5 renovations require asbestos to be removed, a slight increase from 2014 (18% Survey 1, 23% Survey 2). In cases where asbestos is uncovered, asbestos is mainly removed either by a licensed removalist or by the tradesperson. However, 1 in 3 DIY home renovators continue to undertake the removal of the asbestos themselves (36% Survey 1, 32% Survey 2)
- ▶ This suggests that an element of complacency or ignorance towards asbestos exists amongst a segment of DIY home renovators. Further education or a reminder of the dangers of asbestos when conducting DIY and employing professionals to identify and remove it, could be implemented. Potential education or marketing campaigns could engage high profile building / renovation TV shows which are popular with younger audiences (e.g. The Block) or through leaflets/booklets that are included in development applications lodged with councils. In addition to this ASEA may be able to engage DIY stores (e.g. Bunnings) to have pamphlets / leaflets distributed throughout their stores

Real estate agents and private landlords

The importance of knowledge and understanding of asbestos appears to be slipping amongst this audience.

- ▶ In Survey 1, just under 50% of estate agents/landlords believed that understanding asbestos is important. This sentiment has decreased somewhat to just under 40% in Survey 2. This may be a result of...
 - A lack of enquiries from tenants/clients, which have notably declined between the two surveys (25% Survey 1, 17% Survey 2)
 - A drop in the proportion of real estate agents/landlords that recognise they have a duty of care to their tenants and legal obligations (though the latter shift is not significant)

Just over 2 in 5 landlords do not see it as their responsibility to identify asbestos in the property.

- ▶ 43% of landlords do not see it as their responsibility to find asbestos in their property
- ▶ Underlying these beliefs and factors may be a lack of training. Less than 1 in 5 real estate agents and landlords claim to have received any formal training. A large proportion of real estate agents and landlords are claiming a desire for more training (39% Survey 2), although this is notably down from the last survey (50% Survey 1)
- ▶ Worryingly, although based on limited responses, three quarters of those that stated they had received training in the latest survey, said that they felt they still required additional training. A similar result was recorded in the previous survey, indicating that there is a possibility that the training being delivered is not meeting requirements
- ▶ Overall, the results suggest that real estate agents and landlords need reminding of their obligations in respect to asbestos in homes, and potentially additional training in the dangers of asbestos to tenants