

Market Research (Exit Survey)

Revised Final Report

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An evidence-based review of consumer perception of services offered.

October 1, 2013

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(Third Party Observer/Expert - No financial implications or liability)

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Executive Summary

The Beverage Container Management Board (BCMB) works to ensure that Albertans have access to a convenient and cost-effective system for recycling and reusing used beverage containers. The vision of the BCMB is “to be the leader in stewarding beverage containers to minimize their impact on the environment;” complementing this is the mission of the BCMB “to establish and administer a leading beverage container management system that is innovative, accessible, and cost effective”.

The BCMB has engaged G&S Management Consulting Inc. to conduct an exit survey research of depots in the Edmonton and Calgary region. The surveys were conducted at 30 locations split between Edmonton and Calgary on Saturday August 24, 2013.

Exit surveys are meant to gauge the perception of the customer as soon as they leave the depot. This is the most valuable information, because the visit is still fresh in their minds. All parties involved can benefit from the data produced, whether it is the depot owners themselves by changing cleaning schedules or the ABDA and implementing different processes.

The survey was met with mostly positive reviews from many of the participants. We understand that the surveys were easily administered and that there were no major problems or questions participants had. Refund feelings were mostly positive, as most people did not count their bottles before they returned them. Time spent in the depot was for the most part positive, we noticed that the wait times were very short at the beginning of the day, with times increasing as the afternoon approached. Most people were accurate about how much time they had spent in the depot, where others perceived their time spent in the depot more than what it was. The survey asked many questions, one of which was the reason why the participant chose the depot, where most people answered that the depot was closest to their home.

Other areas that were measured included level of customers that would return, satisfaction, hours of operation, and to be improved. These areas were more prevalent to the depot owners themselves as there is valuable information about how customers feel about a particular depot. Information in this area can help depot owners to increase the perception of their depot amongst their customers.

The last area to be examined was the signage around the depot. Particularly if the participant noticed the depot logo sign and signs about the refund levels. The majority of the participants did not recognize the depot logo, but most were aware of the refund amount sign or knew about the refund amount.

G&S has made a few recommendations following the information provided by the survey. Some of the recommendations include setting up guidelines for the depots to adhere to. We also recommend making the depot logo more prevalent during a customer's time at the depot.

Introduction

Objectives and Scope of Work

The BCMB works with the Alberta Bottle Depot Association (ABDA) to ensure that Depots in Alberta are following guidelines set out by the governing bodies. This survey was conducted on behalf of the BCMB, in collaboration with the ABDA to gather a more in depth look into how customers, of the depots that the BCMB and ABDA govern, felt about their overall experience.

Questions to be Addressed

The survey was drawn up by G&S and was revised with input from the ABDA and BCMB. The survey conducted included 17 questions. The survey was drawn up to be short, but at the same time addressed the key topics required. The survey was relatively short to improve the feelings of the participants and the response rate.

The plan was to ask a variety of questions to get an overall view of the market in Alberta. A key consideration was the distance that people drove to the depot they went to and if this was the closest one. These questions really gauged how the other responses from the participants would be, where participants would boast about the aspects they found captivating about the depot. Other questions that were deemed necessary were topics like: cleanliness, hours of operation, and if refunds were accurate.

Project Deliverables and Timelines

Initially G&S management consulting Inc. had envisioned administering the survey over the months of July and August, but the BCMB requested to change the timeline to be over one weekend in August. Once the volunteers were coordinated, G&S went to work at creating a volunteer information package for the day of the survey administration.

Originally G&S had budgeted enough time to administer the surveys, input the data, create information from the data and write a final report within a reasonable amount of time. However, changes were made to the timeline for the administration of the survey, which ultimately pushed the original timelines back. G&S is grateful for the BCMB's and ABDA's understanding of this issue, by allowing us more time to produce a preliminary report and a final report.

Research Methodology

Research Design

The research method that was used was a basic research design with a qualitative approach. We conducted the surveys as the participants left the depot. Customers were asked before they entered the depot if they would like to be apart of the survey. This method was chosen, because we felt it was more efficient and would not skew answers if participants were in a group. The one on one approach was used because we could see the reaction on participants. The surveys were meant to last only five to ten minutes; we timed a sample of the surveys being administered and concluded that on average the surveys lasted three minutes.

- The survey looked at the following areas of consumer perception:
- Overall attitude before entering the facility
- Attitude upon exiting the facility
- General attitude while at the facility
- Did they feel that they received the best service and return on their items
- Cleanliness of the facility

We chose to use a qualitative approach because the survey was to look at the perception of the participant. This approach leads us to understand some of the human behaviour and vaguely the reasons that govern this behaviour. There were some quantitative aspects within the survey, which helped us to compare distances of depots from participants' houses.

The Survey

The questions that were prepared for the survey measured different aspects of the respondents' experience.

- Time spent in the depot
- Satisfaction of time spent in depot
- Perception of the customers time in the depot
- Accuracy of refund
- If there was a POR system was used, how proficient was it
- Signs that reflected the price for different bottle sizes
- The depot sign
- Satisfaction of the location, hours of operation etc.
- Why did the customer choose that particular location

Sample Design

The research team intended to collect a representative sample of the population of Edmonton and Calgary. The sample size is relative to the degree of confidence that the BCMB would require for this research. The research team suggested a 95% confidence interval, in order for the survey results to be a substantial representation of the public. "Edmonton's official population on April 1, 2012, was **817,498**" (Census 2012). The population of Calgary as of 2011 was approximately **1,214,839**. (Statistics Canada).

(Table A) Plan

What margin of error can you accept?	5%	The margin of error is the amount of error that you can tolerate. If 90% of respondents answer yes, while 10% answer no, you may be able to tolerate a larger amount of error than if the respondents are split 50-50 or 45-55. Lower margin of error requires a larger sample size.
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What confidence level do you need? Typical choices are 90%, 95%, or 99%	95%	The confidence level is the amount of uncertainty you can tolerate. Higher confidence level requires a larger sample size.
What is the population size?	Edmonton: 817,498 Calgary: 1,214,839	How many people are there to choose your random sample from? The sample size doesn't change much for populations larger than 20,000
What is the response distribution?	30%	Arbitrary, we expect 30%. using different methods to achieve the best possible response rate.
The recommended sample size is:	Edmonton: 385 Calgary: 385	This is the minimum recommended size of your survey.

(Table B) Actual

Margin of Error	5%
Confidence Level	95%
Population Size	Edmonton: 817,498 Calgary: 1,214,839
Actual sample size:	Edmonton: 285 Calgary: 285

Our team originally had planned for 385 respondents from each city, however due to changes in timelines and errors made on surveys we were only able to retrieve 285 responses from each city. In statistical reasoning this is a significant number, as any population over 1,000,000 only requires a sample size of 200. The G&S team is satisfied with this number as it provides a variety of data for the purposes of this survey.

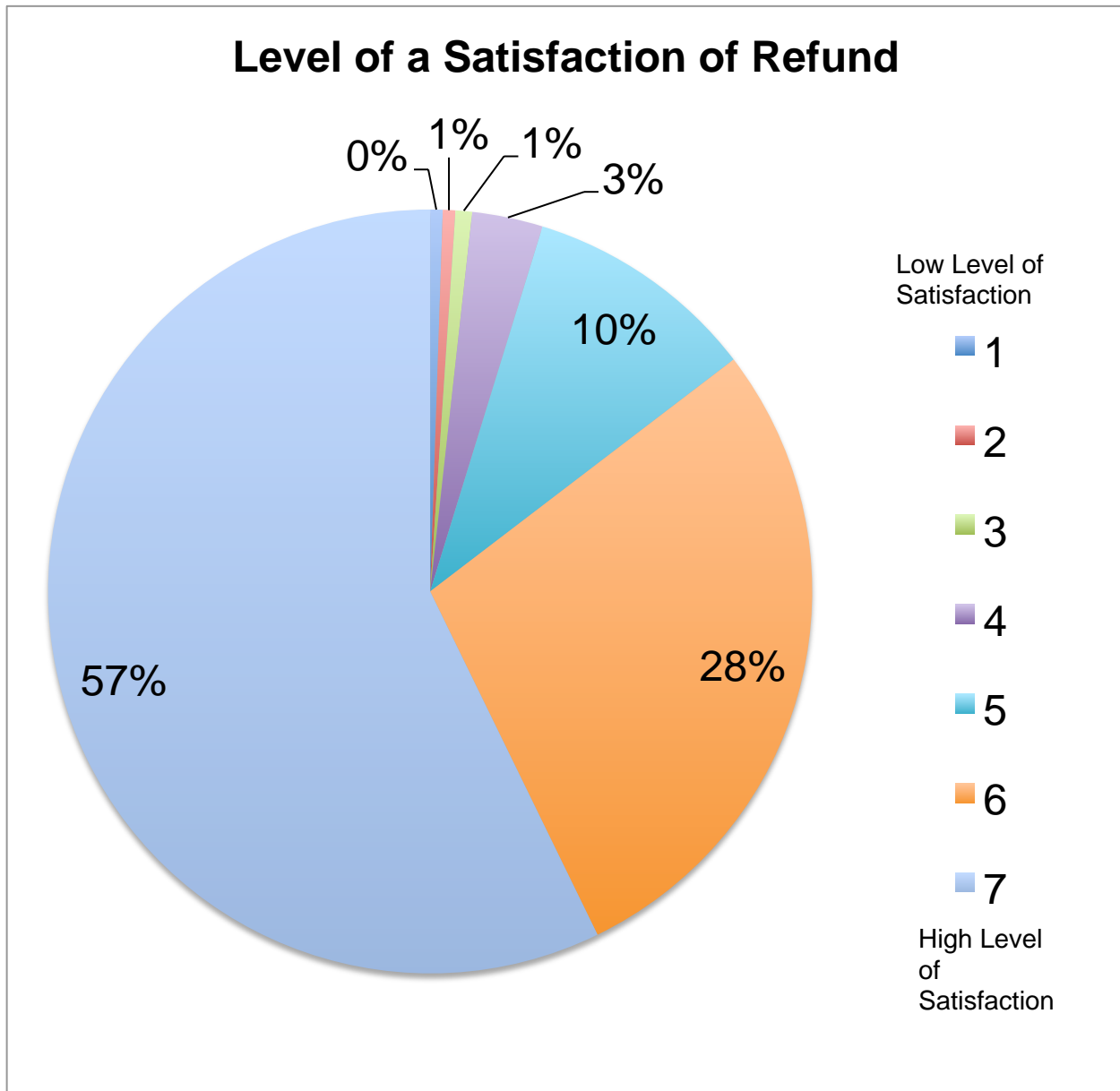
Data Gathering

Key consultants of G&S managed the survey administration. Data Processing and Analysis, standard editing and coding procedures have been utilized. Simple tabulation and cross-tabulations have been utilized to analyze the data. In order to administer the survey representatives, mostly volunteers, manually filled out the survey, using pen and paper. The major problem that most surveys had was the time in which people were willing to fill one out; accounting for this factor, the survey was designed to be short and specific.

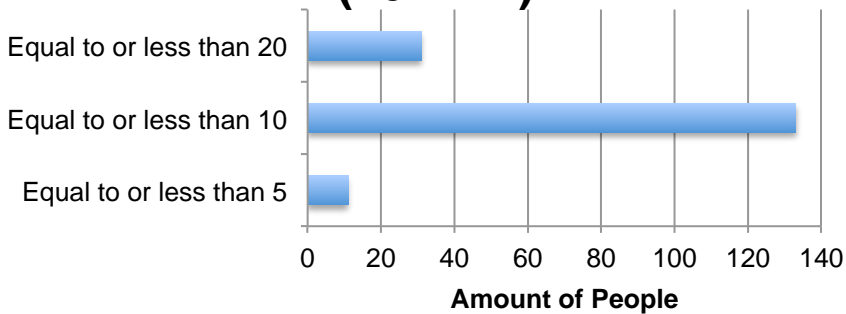
Questions/ Analysis of Responses

Refund Feelings

Most people that participate in returning their bottles to the depots are satisfied with the refund amount that they received, with an average rating of 6.3. There were not many people that felt displeased with their refund amount (about 27 people out of the 580 that were surveyed). The people that were displeased with their refund, at least for the most part, knew how much the deposit was on bottles less than 1L and more than 1L.



Perceived time vs. Actual time (10 min.)

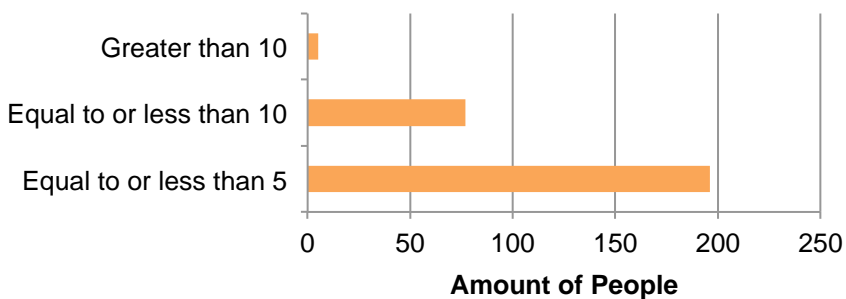


Time Spent in the Depot

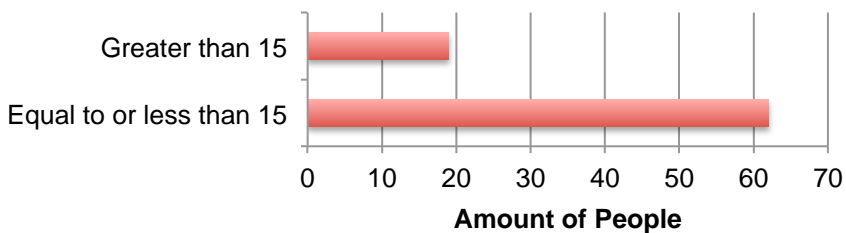
Depot owners and workers try to efficiently serve as many people as possible in a day. We were very pleased with the amount of people going through each of the depots in such a short amount of time.

The average satisfaction with the wait time compared to the average time a person actually waited was acceptable as there were a few outliers that were not impressed with the time they had to wait (even if it was only 6 minutes). The depots are doing tremendous job of servicing many customers in a short amount of time.

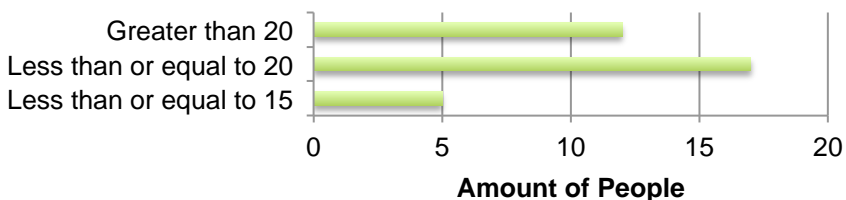
Perceived time vs. Actual time (5 min.)



Perceived time vs. Actual time (15 min.)

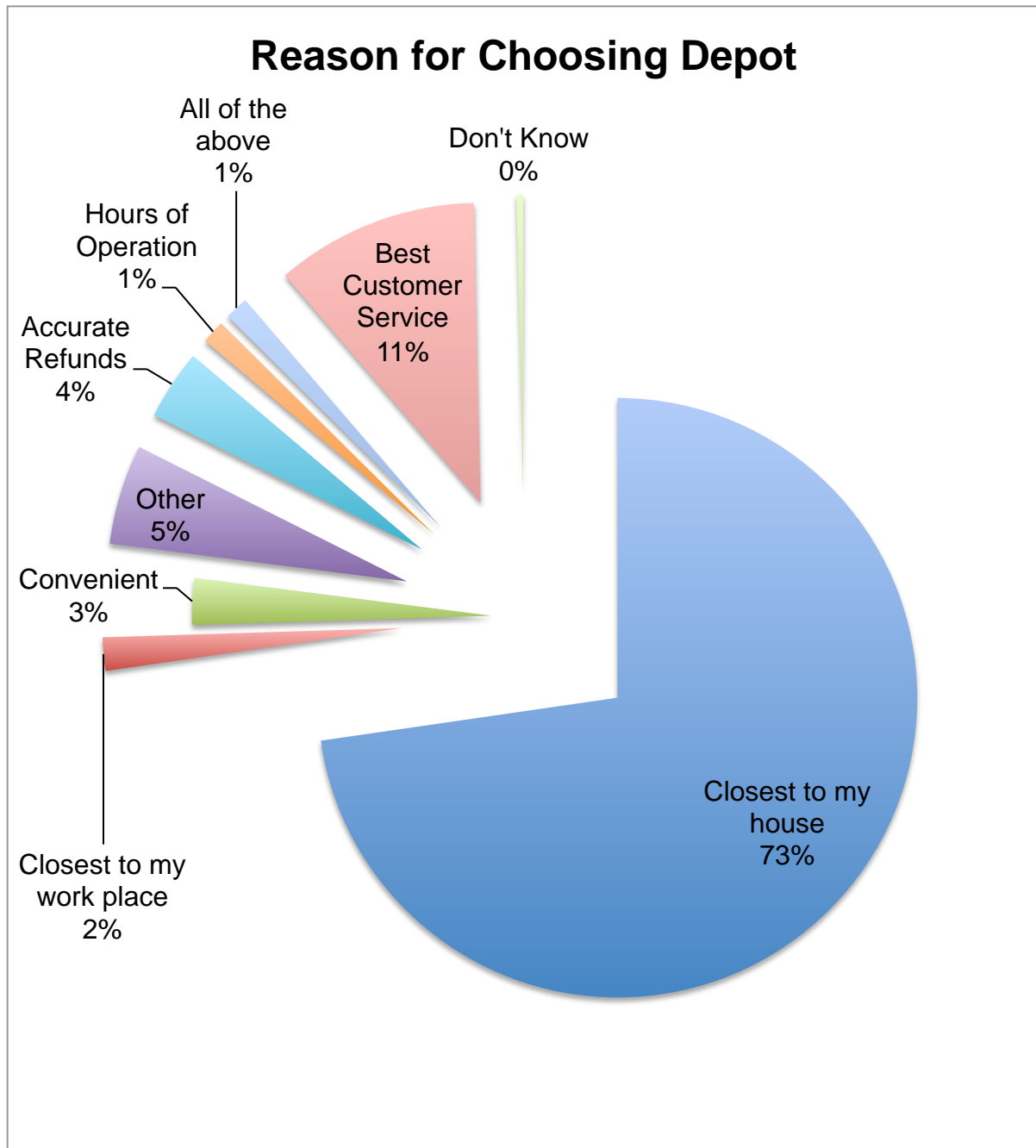


Perceived time vs. Actual time (20 min.)



Reason for Choosing the Depot

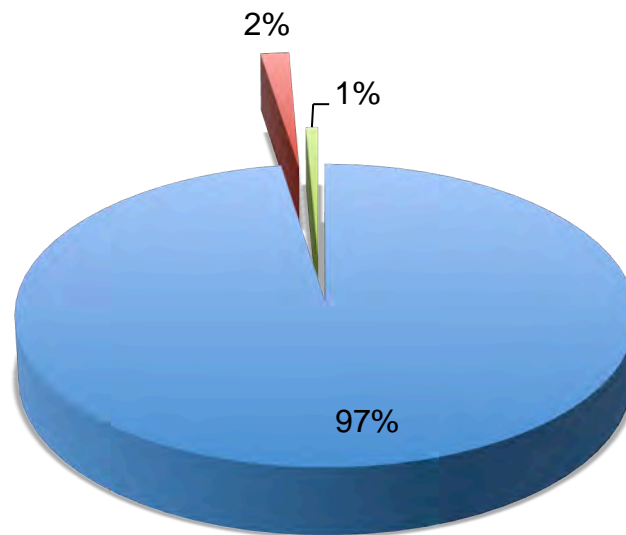
The survey had many options to choose from to highlight why a customer may have chosen that particular depot. The majority of responses were “closest to my house,” this responses is probably due to the fact that when people take bottles in it is the first thing that they want to do on their list of errands. The other major areas that people gave reasons for was best customer service and accurate refunds.



Level of customers that would return

It is refreshing to see that customers that did go to the bottle depot, even with a bad experience, would return to the same depot. This return to the bottle depot is more than likely attributed to the bottle depot being closest to the customers' house, making it more convenient for them to return the bottles. There was a 98% reception of people that would return to the same bottle depot.

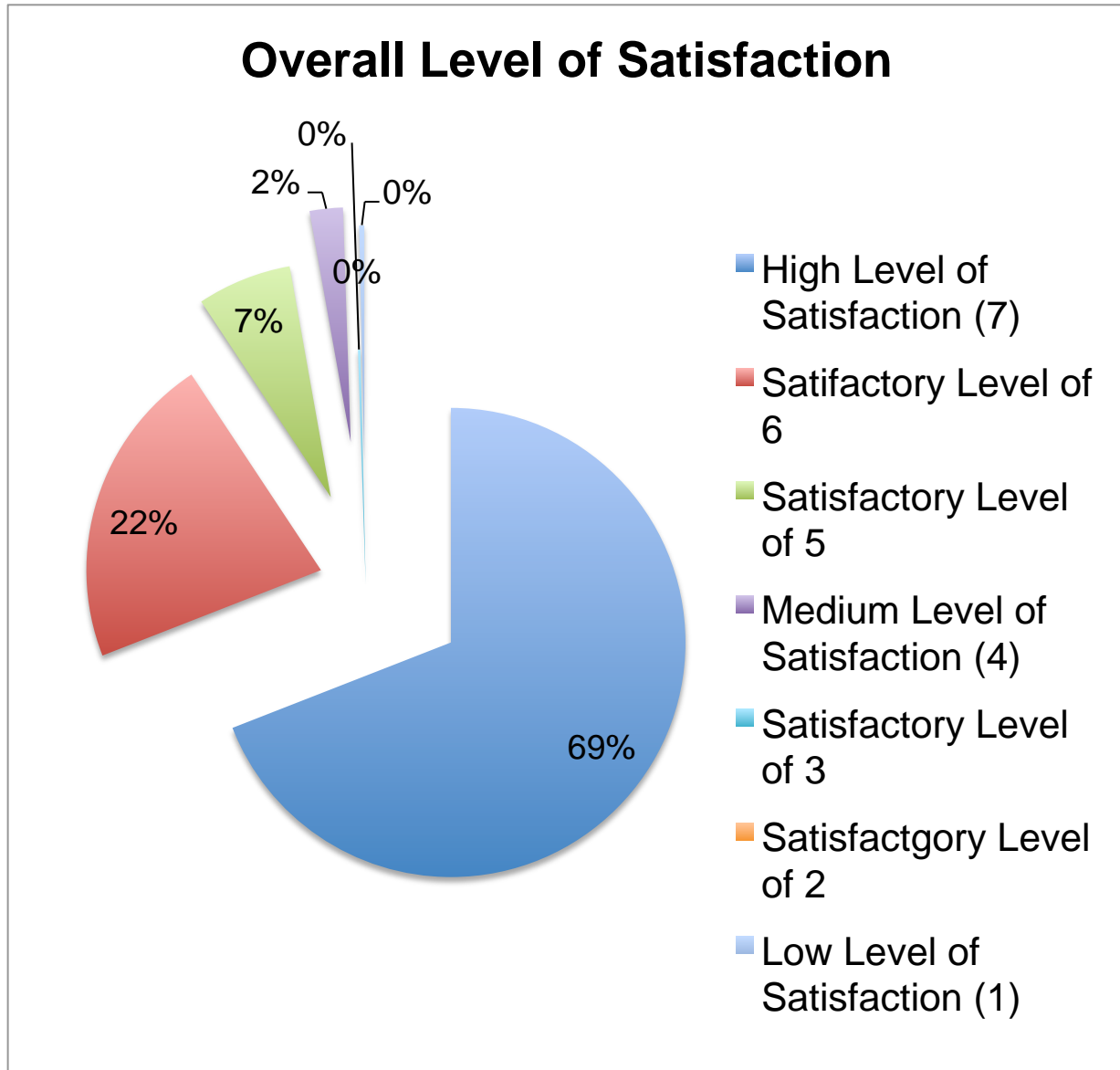
Level of customers that would return



■ Yes ■ Maybe ■ Never

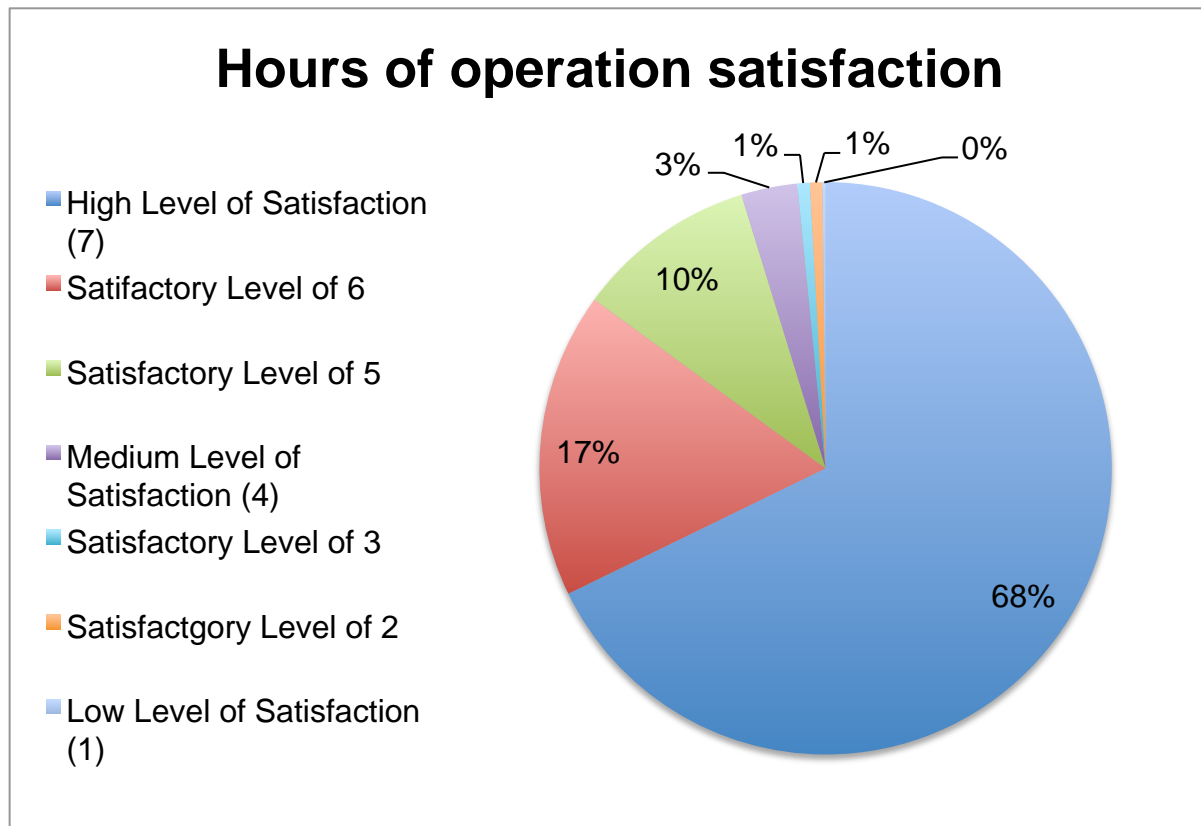
Satisfaction of Experience

Most customers had a positive reception of their experience at the depot. On a scale of 1 - 7 most, 91% of customers responded with a high level of 6 or 7 of their experience at the depot. We feel that most people are not too bothered when they go to the depot, because they either know that it will take some time or they have allotted that time for returning the bottles; other factors could play into this role.



Hours of Operations

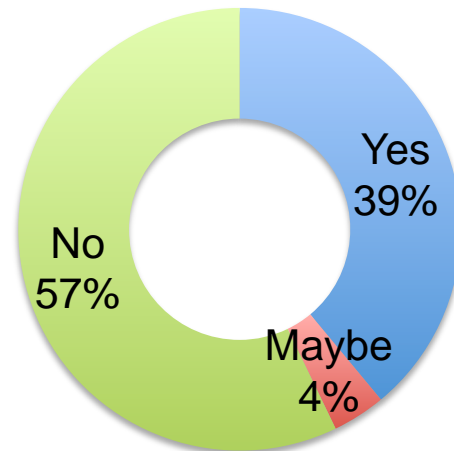
For the most part customers felt that the hours of operations of the depots worked well for them. A 68% was reached with people responding at a level 7 of satisfaction. However, when it came to the lower end of the spectrum and for things the staff could do to improve the experience, most people responded with longer hours. Some of the suggestions were to be open for one hour longer during weeknights or to be open for a short amount of time on Sundays.



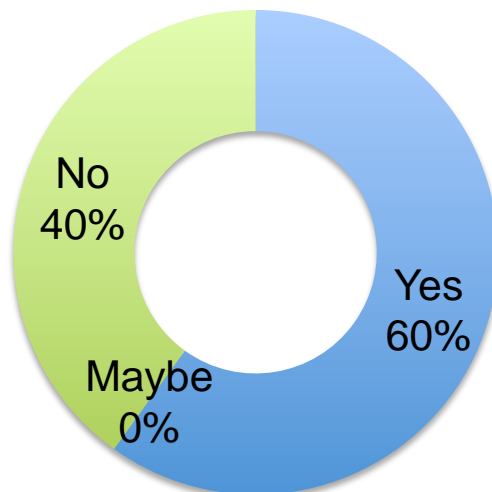
Notice of Signage

The BCMB and ABDA requested to see if people were aware of a few signs that were important to the business. These signs included the Depot Logo, a sign that displayed refund amount per bottle size, and pamphlets/promotional items. Most of the depots have the signs around the depot, but depending on where they are placed could determine how well someone perceives the sign.

Identification of the Depot logo



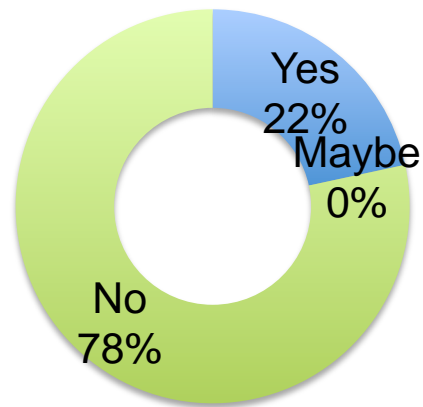
Identification of refund posters



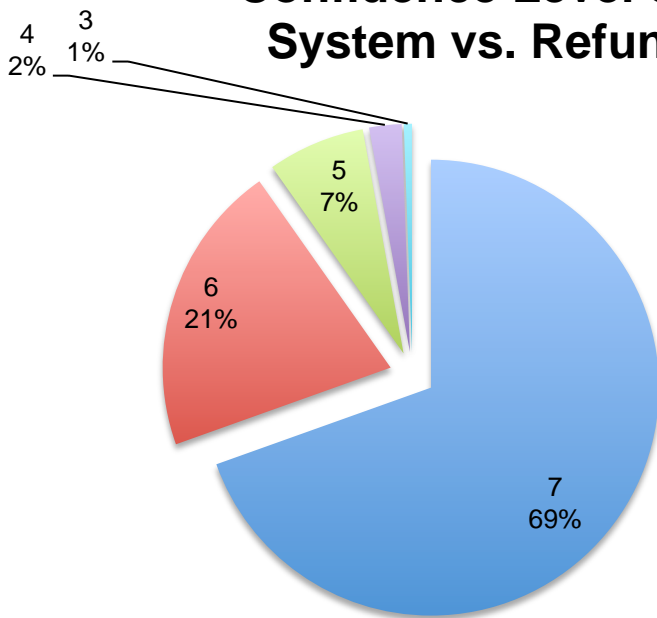
Notice of Brochures and Promotional Items

It should be noted that although great investment may have been made to raise awareness of brochures and promotional items within the depots, the survey results show that the majority of the participants were not aware of these items. Approximately 78% of the participants were not aware of the brochures and promotional items available.

Identification of brochures and promotional items



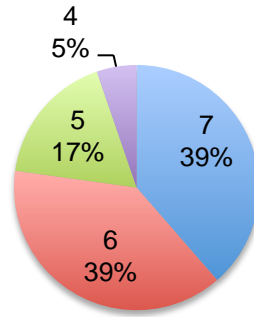
Confidence Level of 7 in POR System vs. Refund Feeling



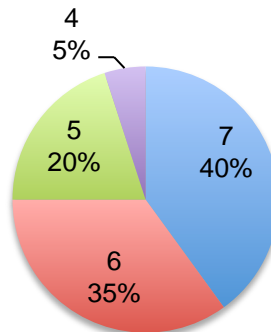
POR System

There was a question about the POR System in the survey, which helped to gauge how well the system is doing. We feel that the data was skewed with some of the responses that were collected. We say this because people that had a confidence level of 1 in the POR system reported a very positive refund feeling (6 or higher, 85%). People with a confidence level of 7 in the POR system had a positive feeling about the refund that they received (90%).

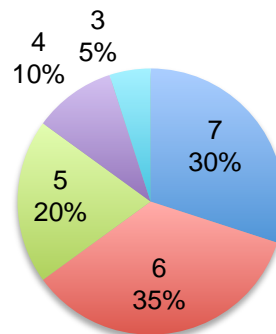
Confidence Level of 6 in POR System vs. Refund Feeling



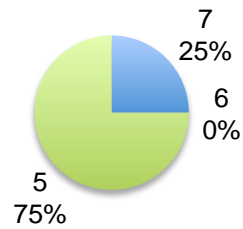
Confidence Level of 5 in POR System vs. Refund Feeling



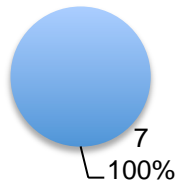
Confidence Level of 4 in POR System vs. Refund Feeling



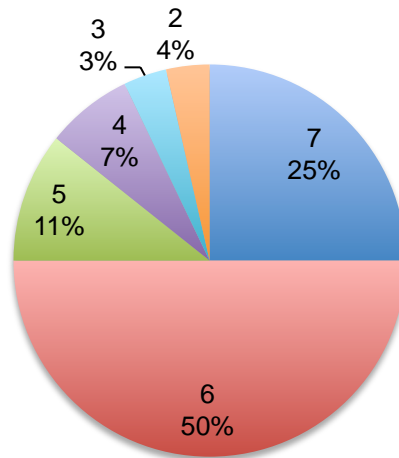
Confidence Level of 3 in POR System vs. Refund Feeling



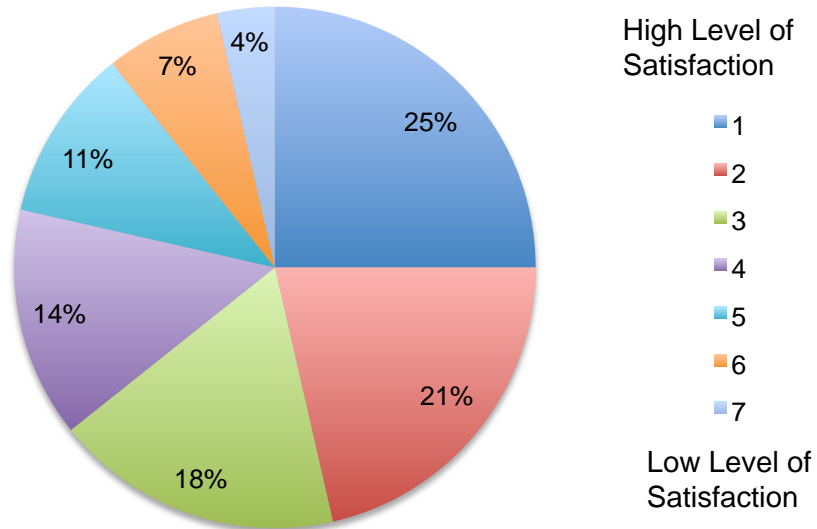
Confidence Level of 2 in POR System vs. Refund Feeling



Confidence Level of 1 in POR System vs. Refund Feeling



Level of Satisfaction with no POR System



To be Improved

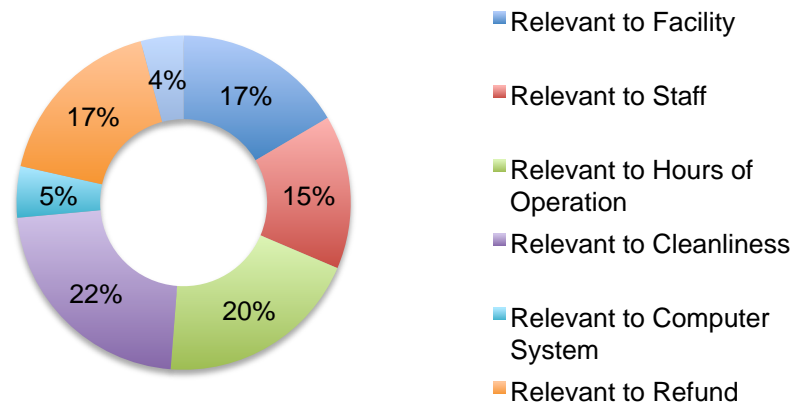
There was a really good reception of how well the individual depots have done, for the most part people understand that it is a business that is “dirty” in a sense and the depots do the best that they can.

“Relevant to facility” includes increasing number of stations, better parking, etc. “Relevant to Staff” includes being more kind, counting faster, etc.

“Relevant to Hour of

Operation” includes being open later on weekdays, open on Sundays, etc. “Relevant to Cleanliness” includes garbage, floor stickiness, washrooms, sanitizer, etc.

Areas to improve on



In the list below are some of the suggestions people made to make their experience better:

- Could be cleaner
- Have a hand washing station or sanitizer
- Install a computer system that shows you the count as they pass the bottles through
- Count out loud
- Better ventilation
- Increase staff

There were some responses that we felt were not appropriate and should be disregarded upon review of the raw data. We have not included such responses in our overall evaluation of the depots.

Opportunities for Consideration

1. Cleanliness

One of the comments we noticed a lot of was the need for the depot to be clean. We understand that there are many crushed bottles, which spill and make the floor sticky. It is a grueling task to constantly be cleaning floors, however we feel that it would be in the best interest of the depot to have a schedule of cleaning. This schedule could include washing the floor every two hours for example, making sure that the area is clean and free of debris. A majority of people sited cleanliness as something that could be improved on.

There may be push back from the depot owners as this may be a task where they have to hire another person or invest more money for cleaning supplies. The ABDA and BCMB set out guidelines and regulations for the depot to adhere to. We believe that the depots would respond better if this were added into a guideline for the depot.

This is a part of managing change in this industry, as there may be practices already set up, but after hearing the responses from customers we feel that it is necessary to have a more prominent cleaning regiment. G&S Management Consulting is well versed in change management and would be glad to help administer a program to ensure the success of all parties.

2. Computerized/ POR System

Many comments were made about how well the POR system worked at the depots that had implemented them. People were very positive in saying that they could see how many bottles were tallied as the person was counting them. We found that the customer was at more ease with the refund that they received when there was a POR system in place. Feelings behind this is that people stated they trusted the computers tallying abilities and legibility more than if an employee was just counting and writing the numbers down. We understand that the employee still counts the bottles and inputs the information, but the customer feels like they are getting a more accurate refund when there is a computer in place.

Implementing computer systems is a long process and can be very expensive as well. However, in the long run the benefits of a computerized system outweigh the initial costs. Again there may be push back from the owners of depots to implement a system, but we feel that it will improve the customers experience and the depots efficiency tremendously.

3. Customer Service / Friendliness of Staff

A concern that survey participants had was customer service and friendliness of staff. Depending on the depot location respondents felt that the staff could be more receptive. Customer service is key and can always be improved, an organization can never over exceed in their level of customer service. We recommend holding customer service seminars for managers and supervisors as well as select staff; this will result in changing the depot culture, which will nurture a higher standard of customer service. G&S Management Consulting can provide these seminars to the depots.

4. Signage and Logo

There are a few things when it comes to the DEPOT logo that could be improved on to ensure that people are seeing it. One of the aspects that supervisors and volunteers noticed on the day of administering the surveys was that the DEPOT logo was too small in comparison to the other text that was on the signage. The position of the logo on the sign also proves to be an area that can be improved on; as it was not the first thing that a person notices, neither is it the last.

We recommend making the DEPOT logo bigger so that it is more prominent; this will help to increase the recognition of the logo and intrigue people to research into the company.

The results of the survey indicate that there is a need to re-strategize the logo positioning as well. It may not be the logo itself but the location in which it is placed in the depot. We recommend having a marketing specialist devise a design plan within depots that would give the best possible locations for the logos and the promotional items. This would be a value added investment for the bottle depots and it would reinforce the DEPOT brand as well as the promotional items. A key recommendation from the survey participants that would prove to be effective is a road sign indicating the location of the depot. A relatively mid sized sign at the entrance of the premises of the parking lots of the depot would prove to be effective.

Summary


The survey was met with success and we were able to gather valuable information for all parties. The exit survey was administered with little to no problems and we are grateful for the volunteers that helped administer the surveys. We feel that the results from the survey created a good basis to understand the market better. Using the results from this survey can help to increase the positive perception of depots from the customers.

G&S Management Consulting Inc. feels that the BCMB, ABDA and depots are doing a fantastic job of attaining their mission and vision by providing accurate refunds, helping people out in a timely matter and creating a less polluted environment. For the most part perception from the customers was positive, however there is always room for improvement. We feel that if the parties included in this surveys implemented our recommendations, they would receive more positive reviews. We feel that the affiliated parties have done a great job with their current way of business.

Thank you for giving us this opportunity to work with your spectacular organization. We hope that our services have been useful to your organization. We are enthusiastic about the relationship that we have created and hope to be of use to you again.

Sincerely,

G&S Management Consulting

A handwritten signature in cursive script that reads "Gary Inglis".

Mr. Gary Inglis, Director of Research
780-235-7712
E-mail: ginglis@ualberta.ca

Appendix 1 (Distance Traveled Residence to Depot Location)

Figure 1 (ABC Bottle Depot)

Average Distance Traveled	Average Travel Time	Total Respondents
7.4 Kms	9.75 Minutes	20

Figure 1.1

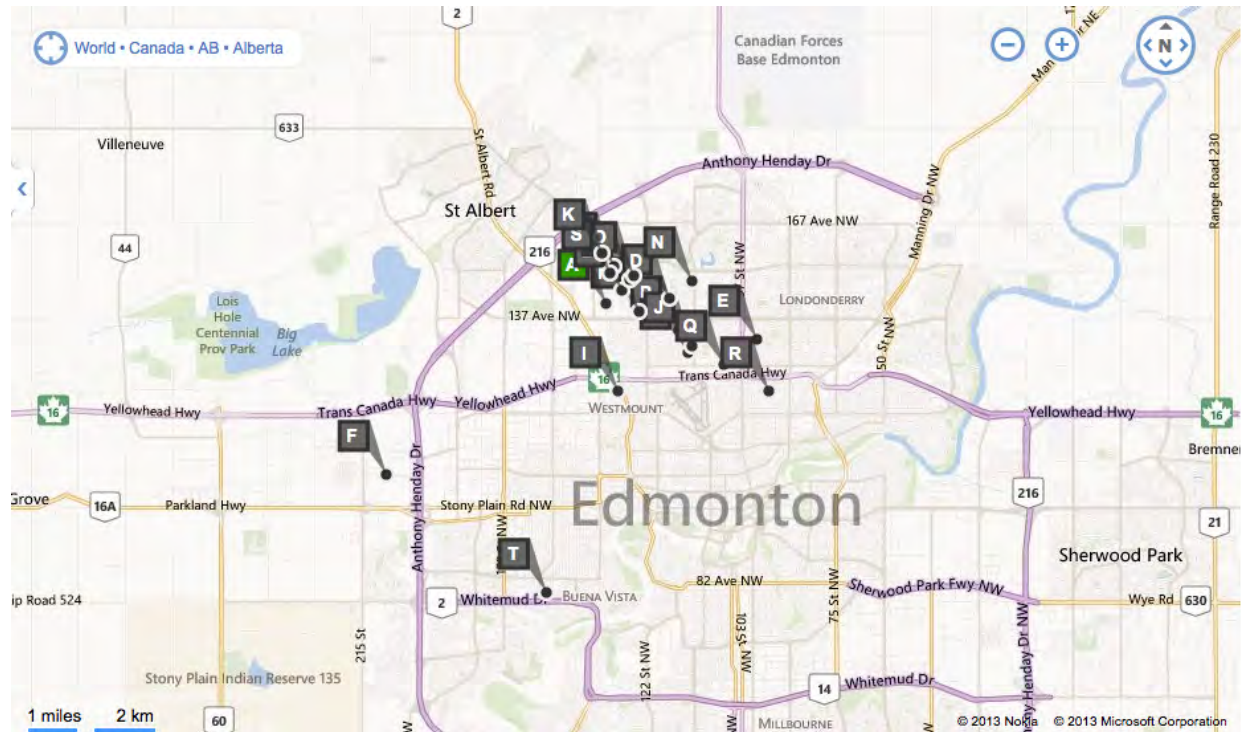
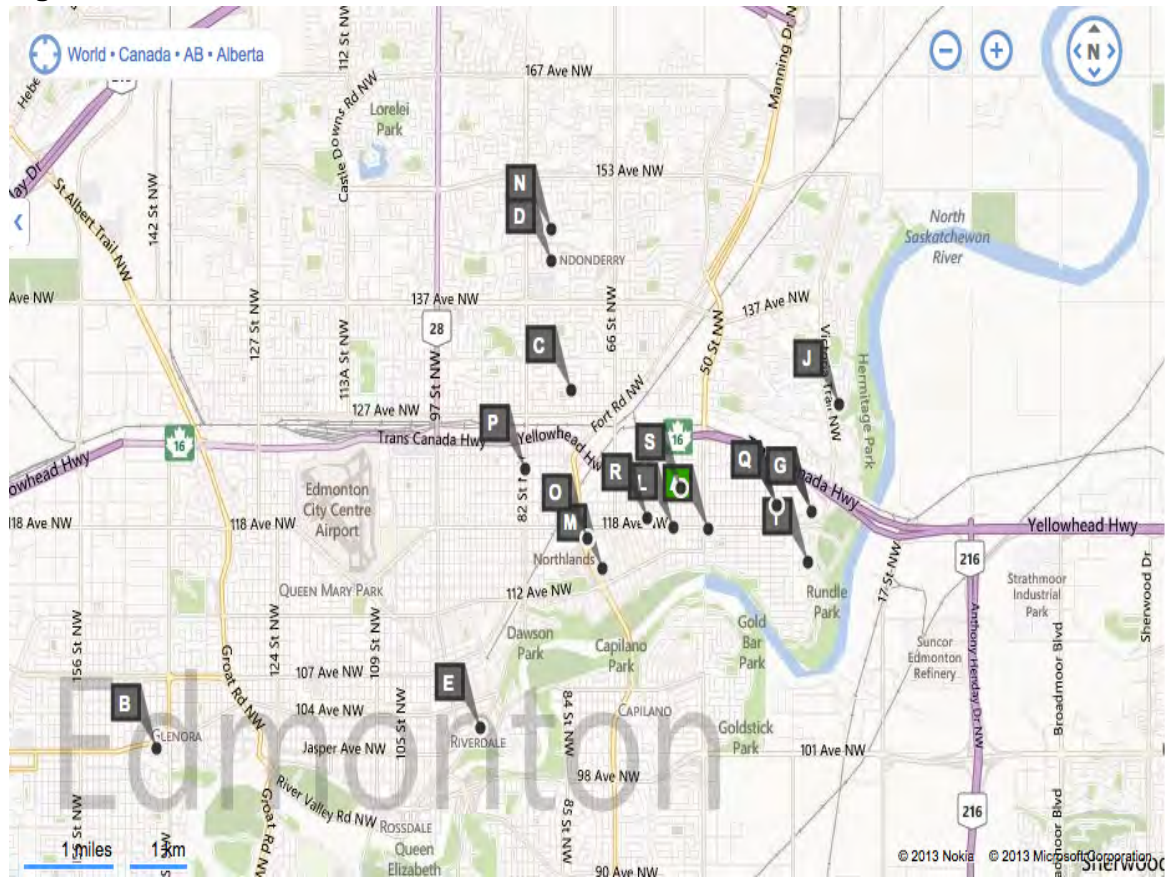


Figure 2 (Beverly Bottle Depot)

Average Distance Traveled	Average Travel Time	Total Respondents
3.6 Kms	6.23 Minutes	21

Figure 2.1



Average Distance Traveled	Average Travel Time	Total Respondents
2.76 Kms	5.13 Minutes	23

[illegible]

Figure 4 (Capilano Bottle Depot)

Average Distance Traveled	Average Travel Time	Total Respondents
4.04 Kms	7 Minutes	21

Figure 4.1

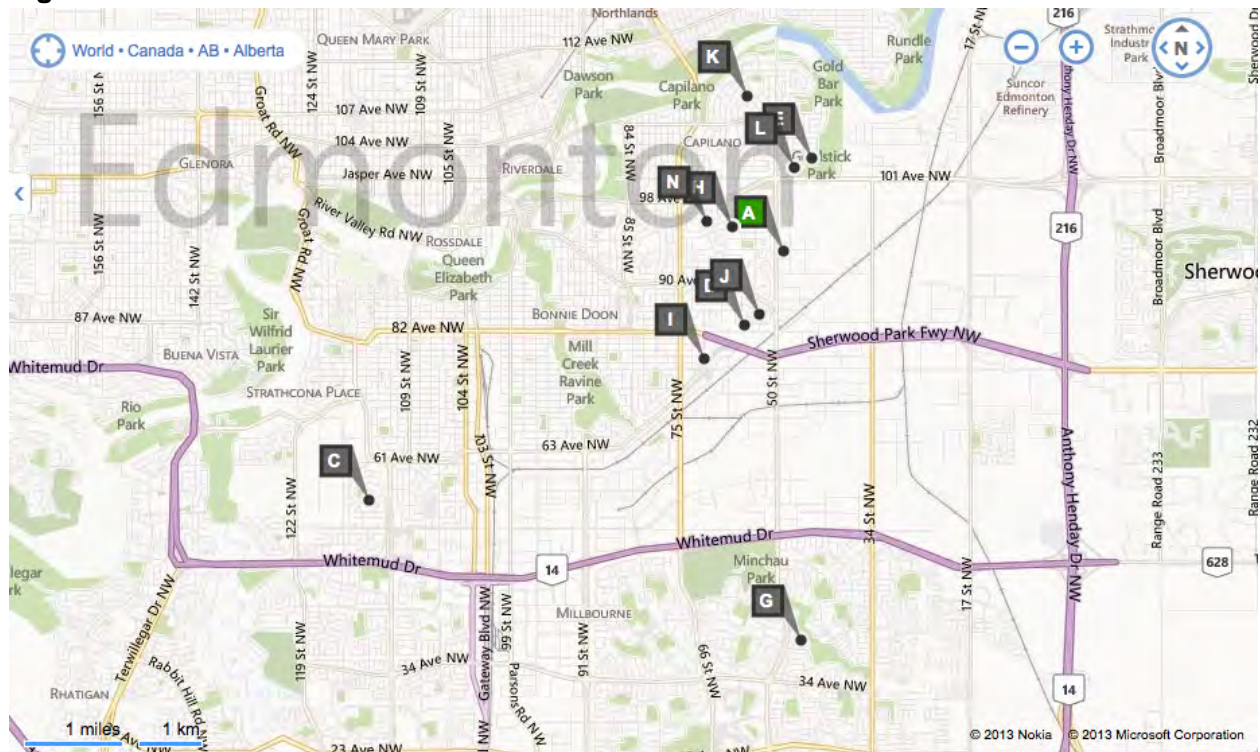


Figure 5 (City Centre)

Average Distance Traveled	Average Travel Time	Total Respondents
5.6 Kms	9.5 mins	21

Figure 5.1

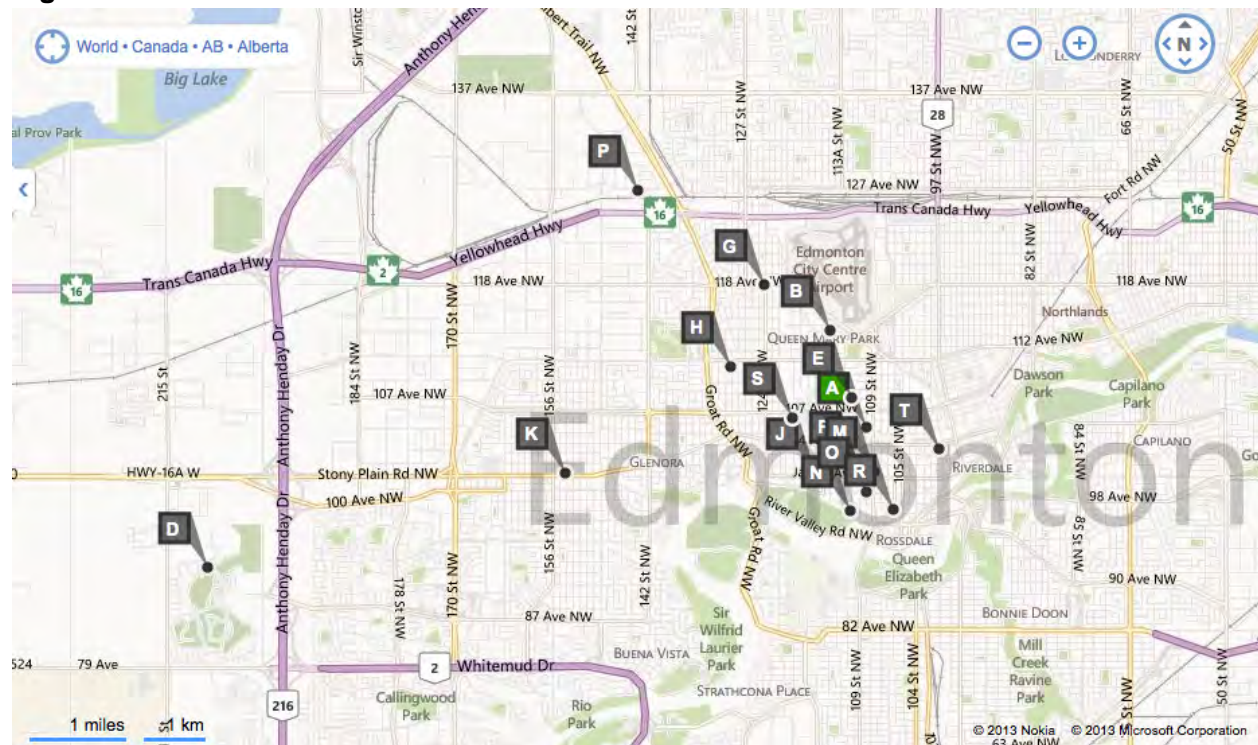


Figure 6 (Clareview)

Average Distance Traveled	Average Travel Time	Total Respondents
7.9 Kms	10.25 mins	19

Figure 6.1

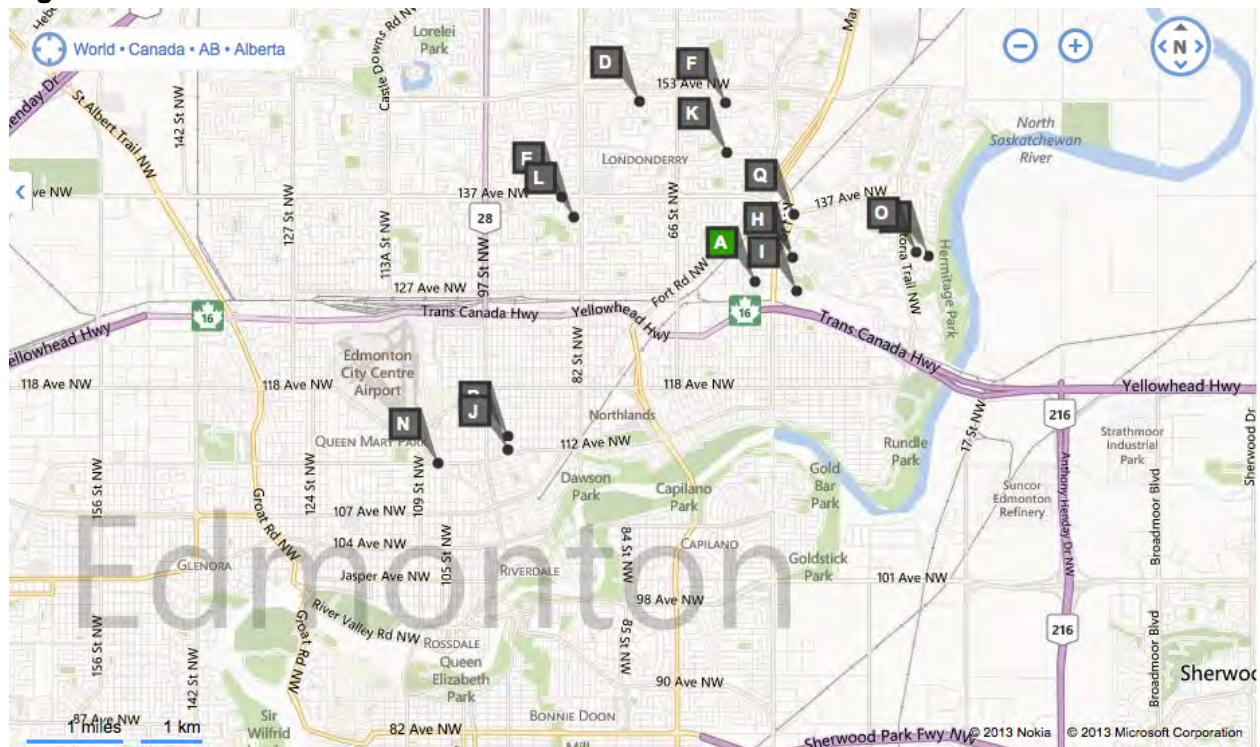


Figure 7 (Fort Road)

Average Distance Traveled	Average Travel Time	Total Respondents
26 Kms	22 mins	20

Figure 7.1

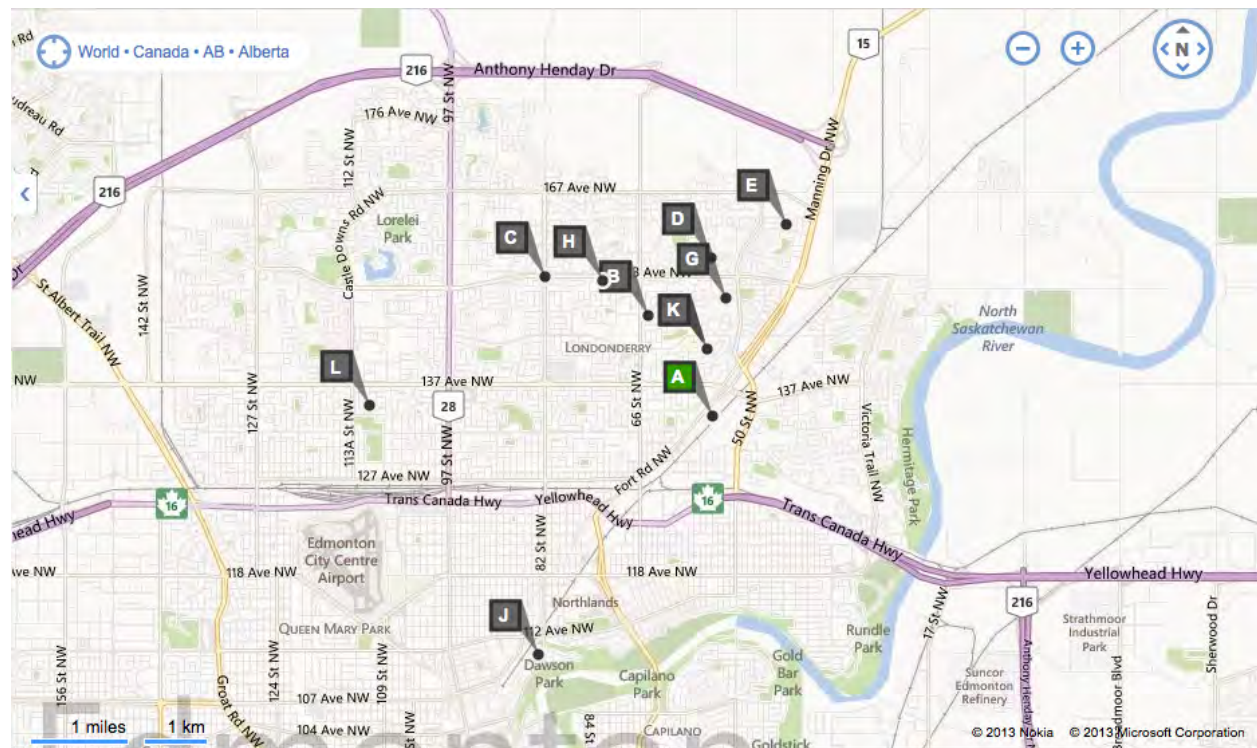


Figure 8 (Millwoods)

Average Distance Traveled	Average Travel Time	Total Respondents
7.5 Kms	11.2 mins	24

Figure 8.1

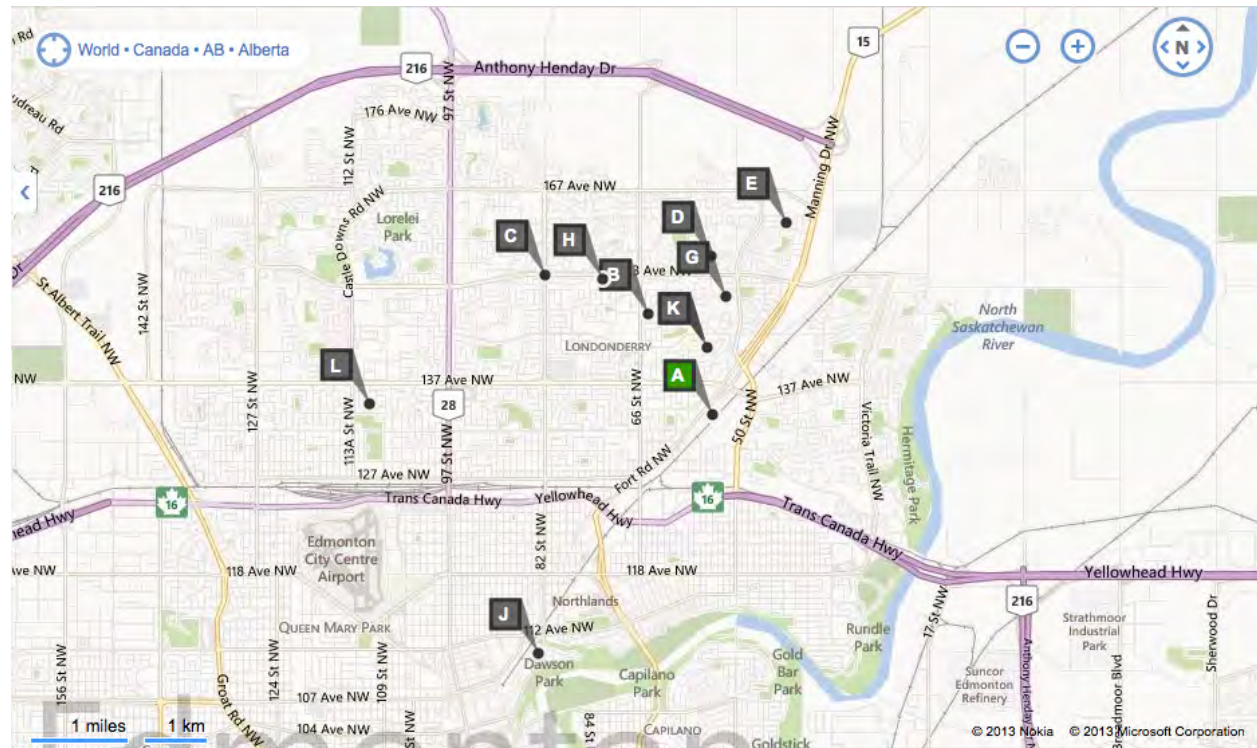


Figure 9 (North Refund)

Average Distance Traveled	Average Travel Time	Total Respondents
4 Kms	6.8 mins	20

Figure 9.1

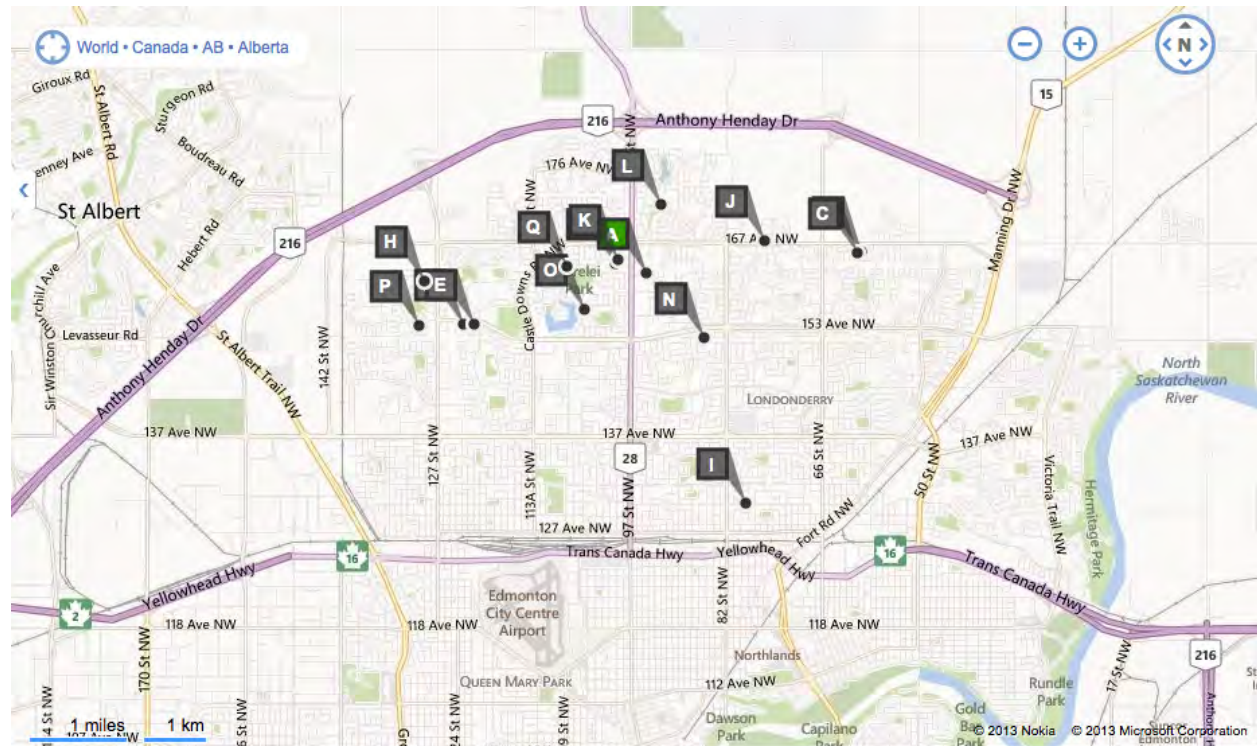


Figure 10 (Quasar)

Average Distance Traveled	Average Travel Time	Total Respondents
5.6 Kms	10.7 mins	19

Figure 10.1

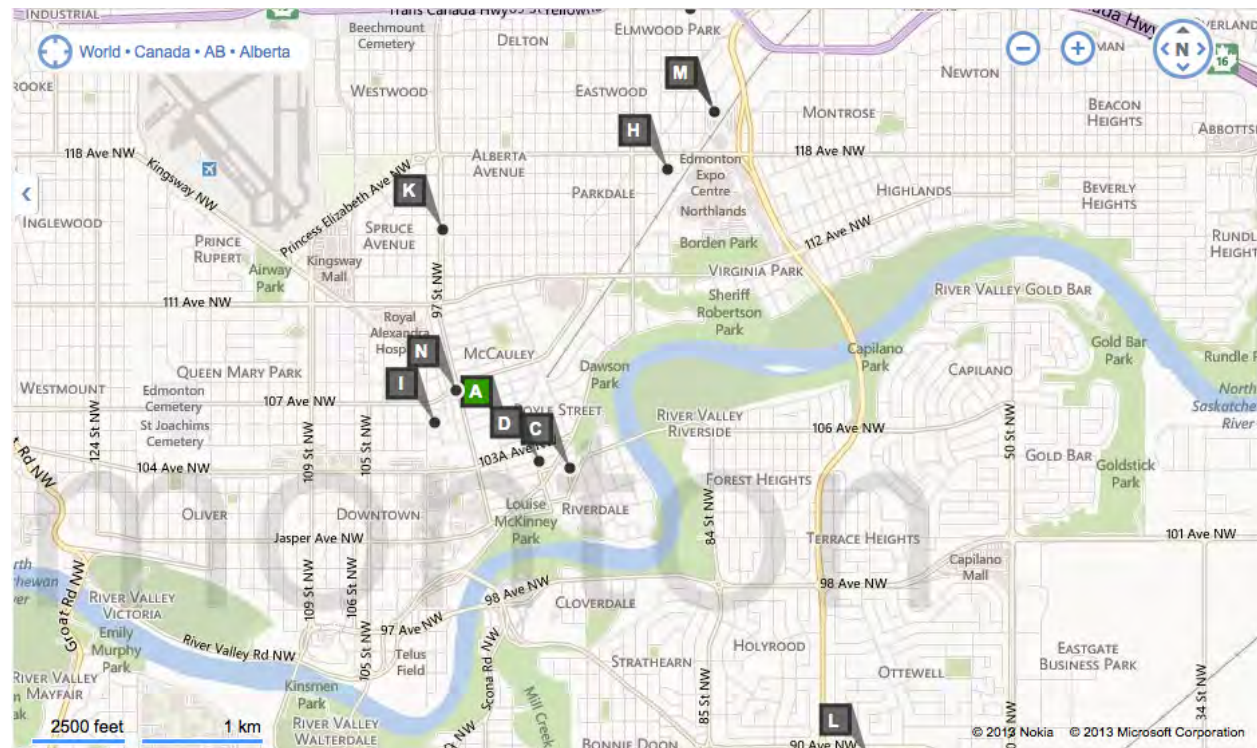


Figure 11 (Roper)

Average Distance Traveled	Average Travel Time	Total Respondents
6.6 Kms	10.3 mins	43

Figure 11.1

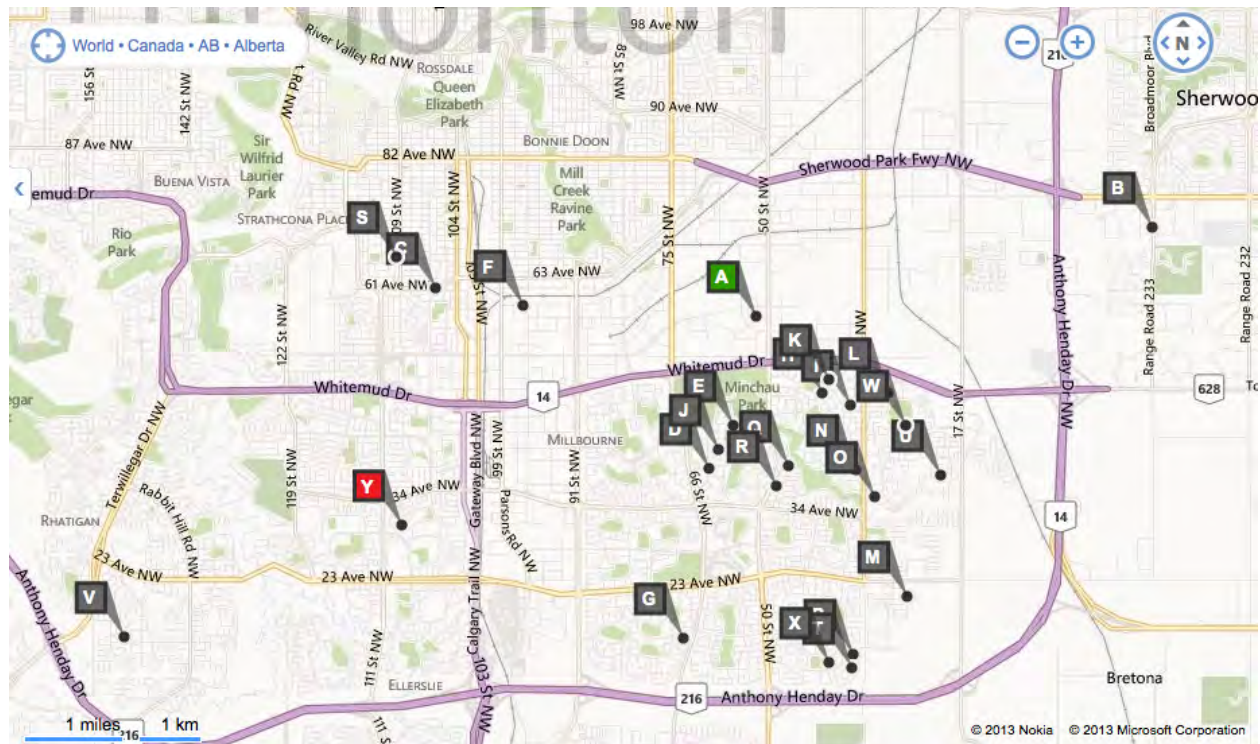


Figure 12 (Summerside)

Average Distance Traveled	Average Travel Time	Total Respondents
5.37 Kms	8.12 mins	25

Figure 12.2

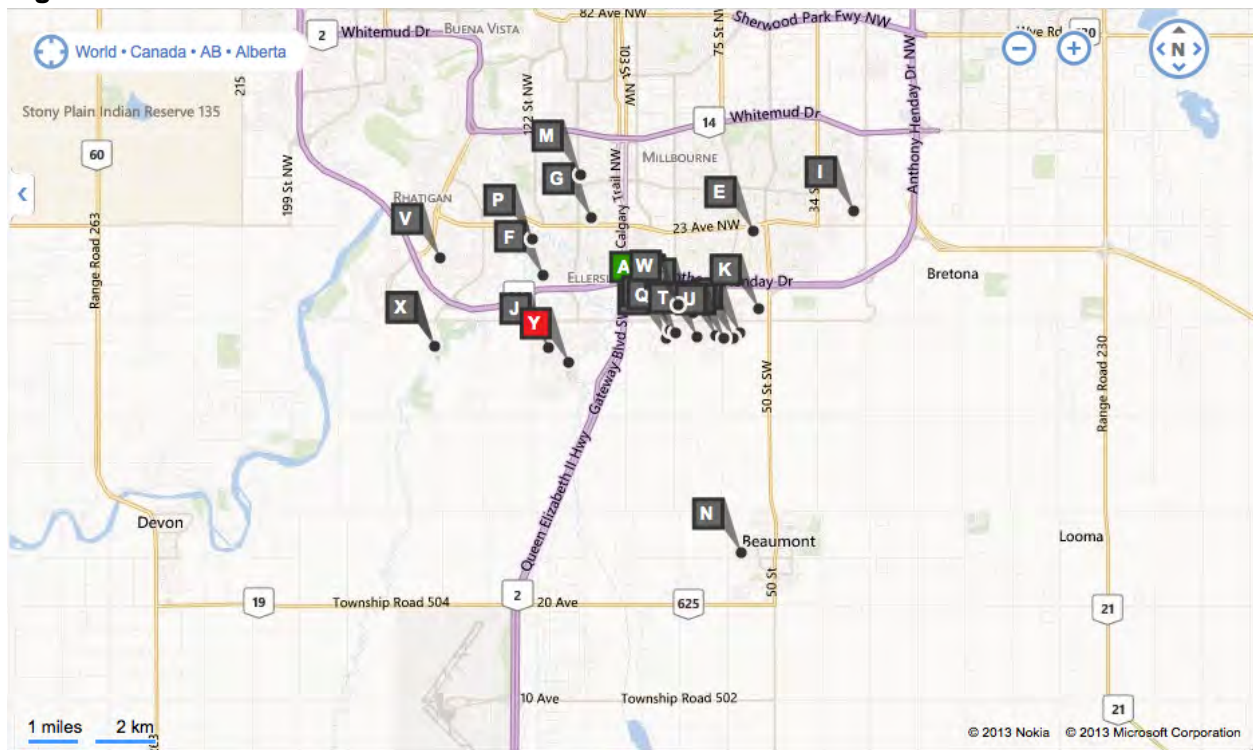


Figure 13 (Univer)

Average Distance Traveled	Average Travel Time	Total Respondents
4.6 Kms	8.16 mins	20

Figure 13.2

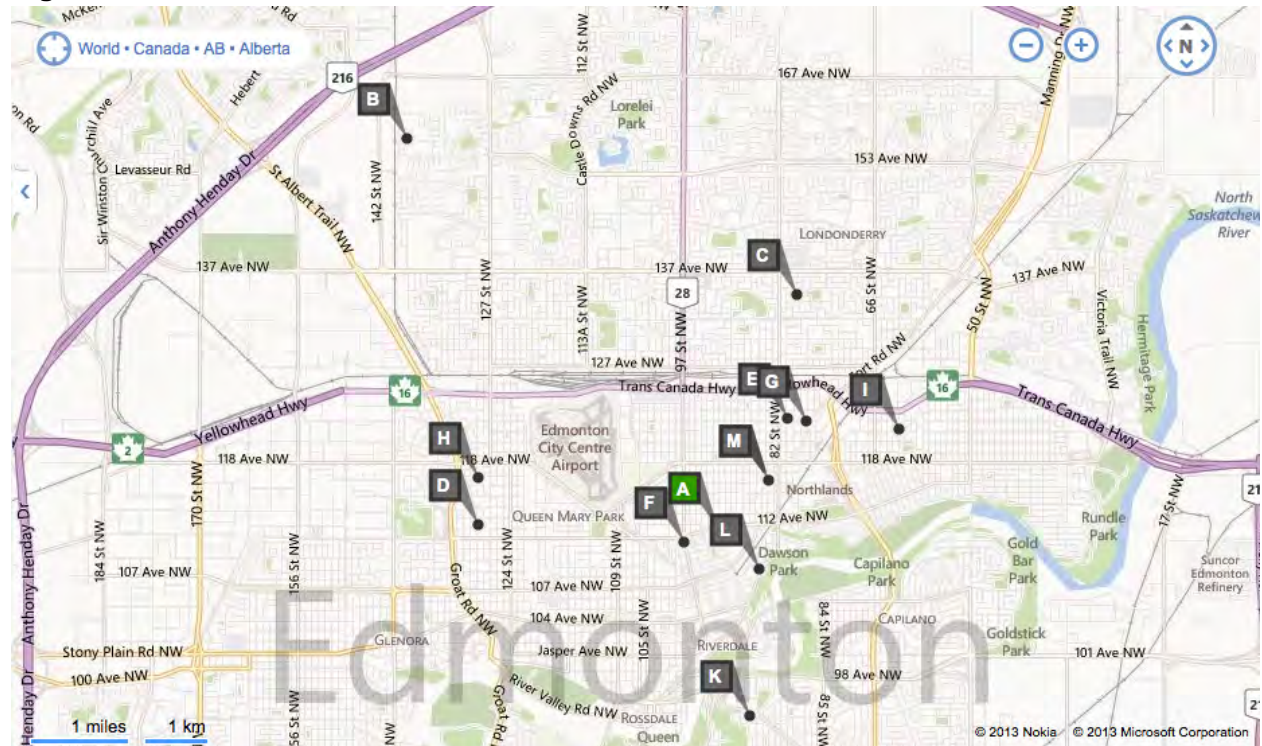


Figure 14 (Beddington Heights)

Average Distance Traveled	Average Travel Time	Total Respondents
5.8 Kms	9.9 Minutes	25

Figure 14.2

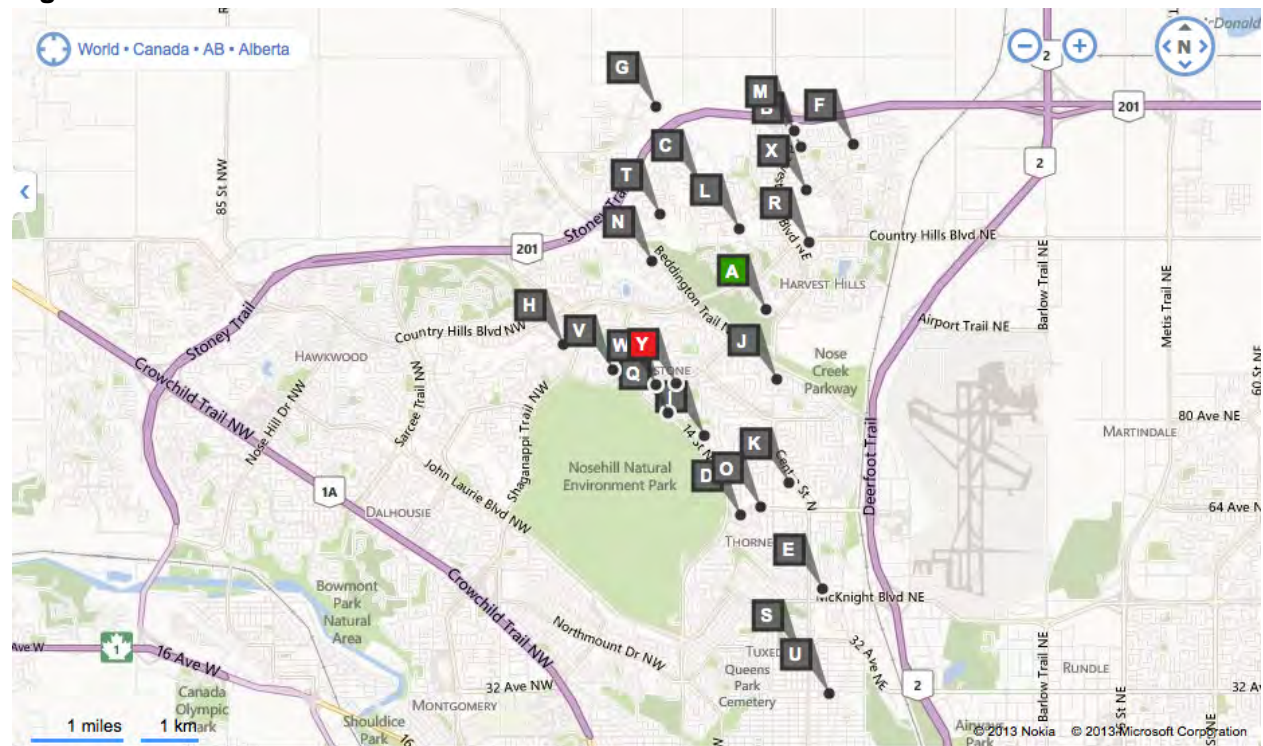


Figure 15 (Bowness)

Average Distance Traveled	Average Travel Time	Total Respondents
7.1 Kms	8.9 Minutes	17

Figure 15.1

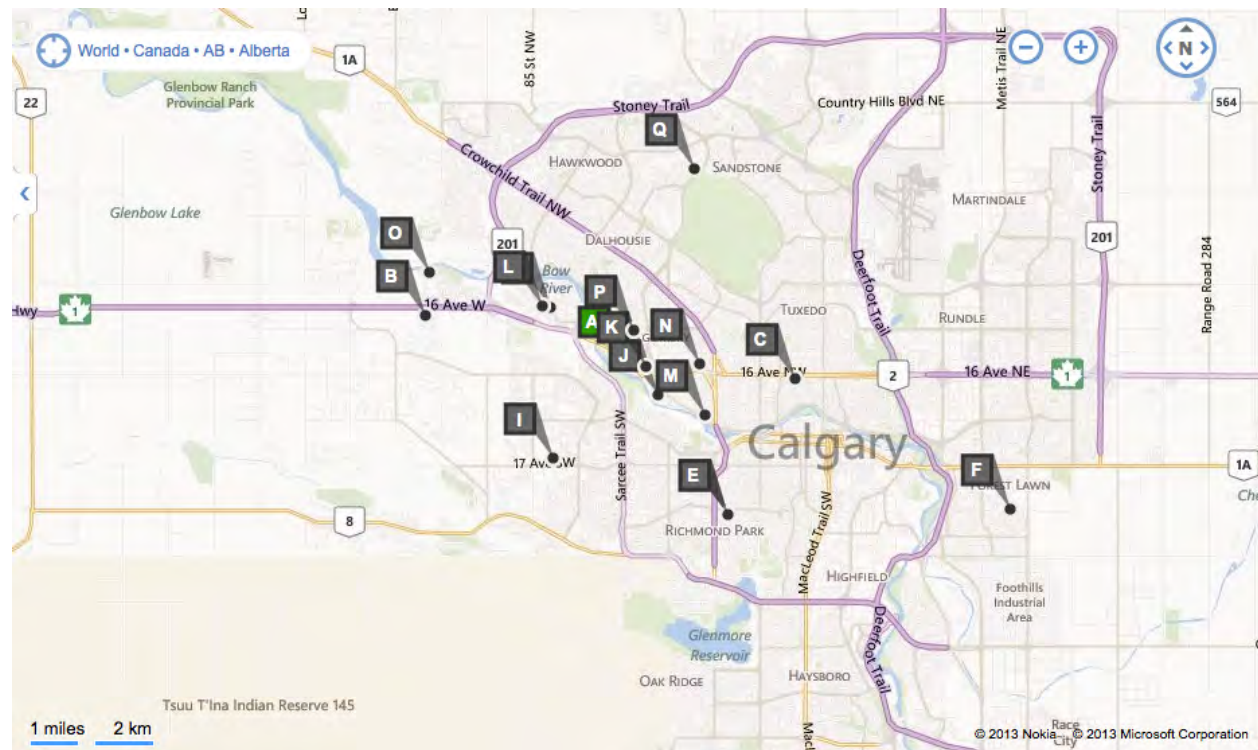


Figure 16 (Calgary Bottle)

Average Distance Traveled	Average Travel Time	Total Respondents
10.4 Kms	13.2 Minutes	24

Figure 16.1

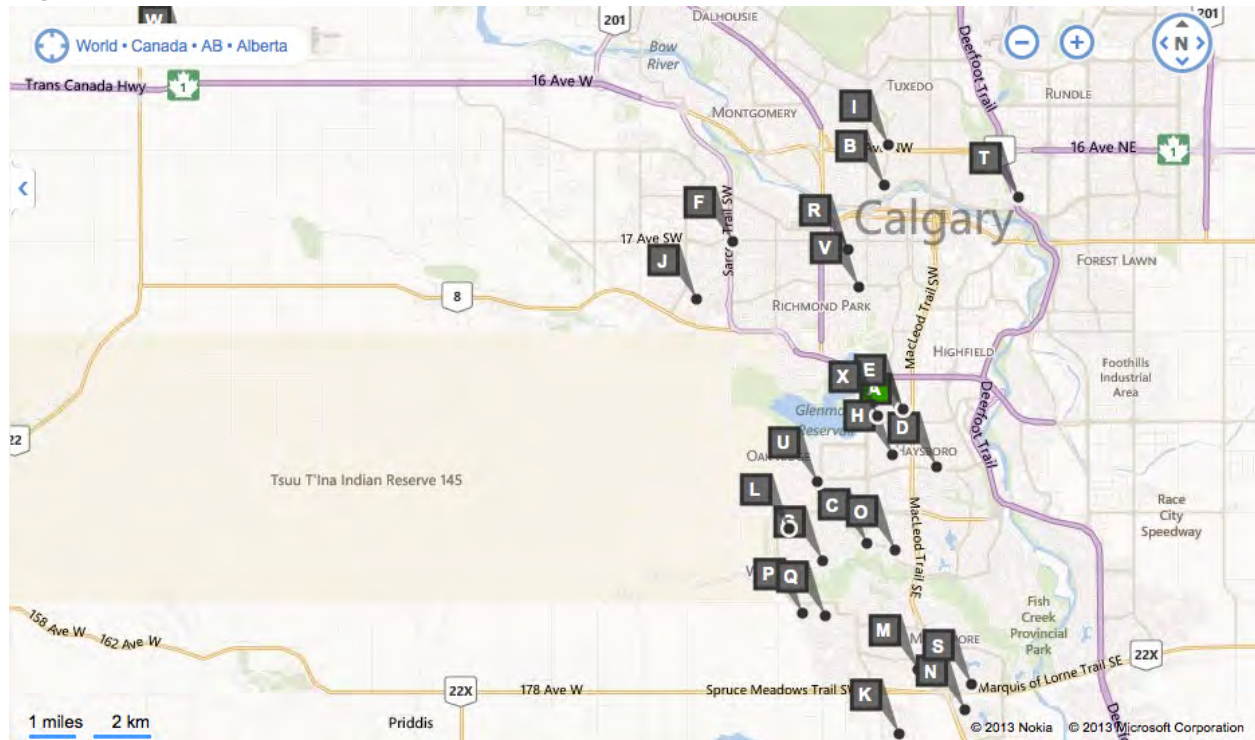


Figure 17 (Country Hills)

Average Distance Traveled	Average Travel Time	Total Respondents
13.86 Kms	15.4 Minutes	10

Figure 17.1

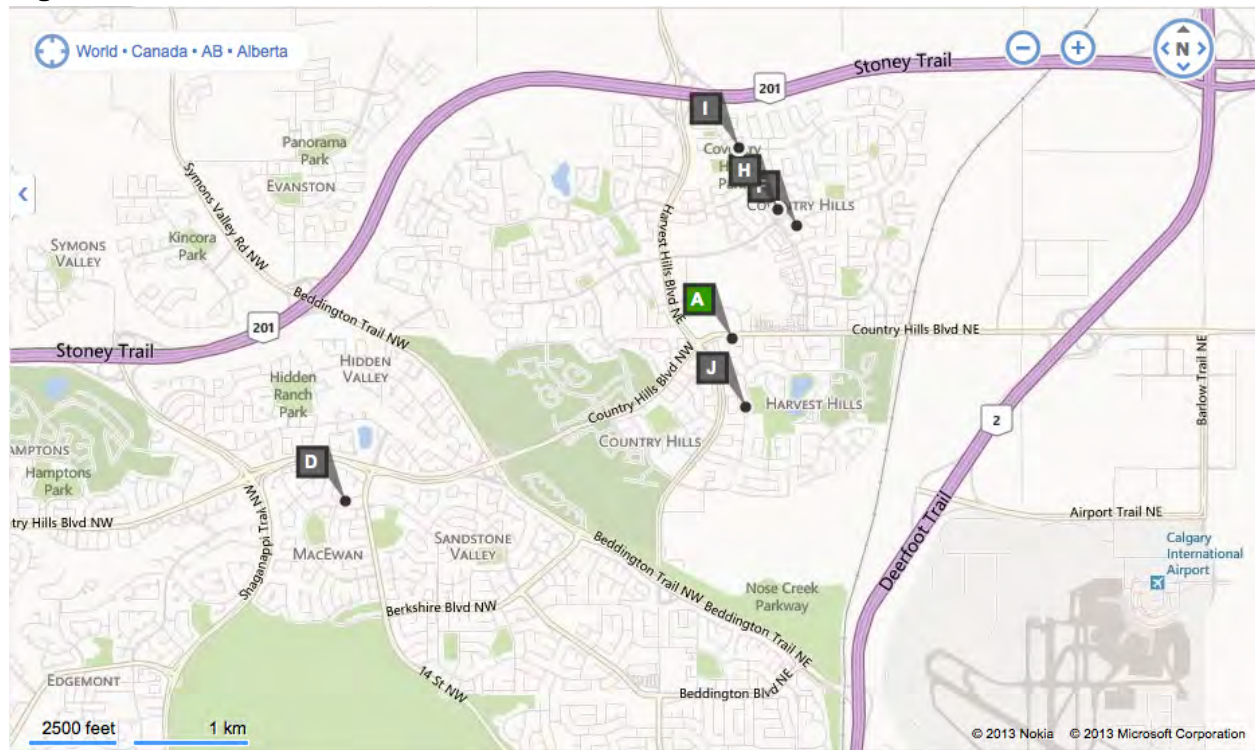


Figure 18 (Deerfoot)

Average Distance Traveled	Average Travel Time	Total Respondents
8.6 Kms	10 Minutes	24

Figure 18.1



Figure 19 (Fish Creek)

Average Distance Traveled	Average Travel Time	Total Respondents
5 Kms	7.8 Minutes	25

Figure 19.1

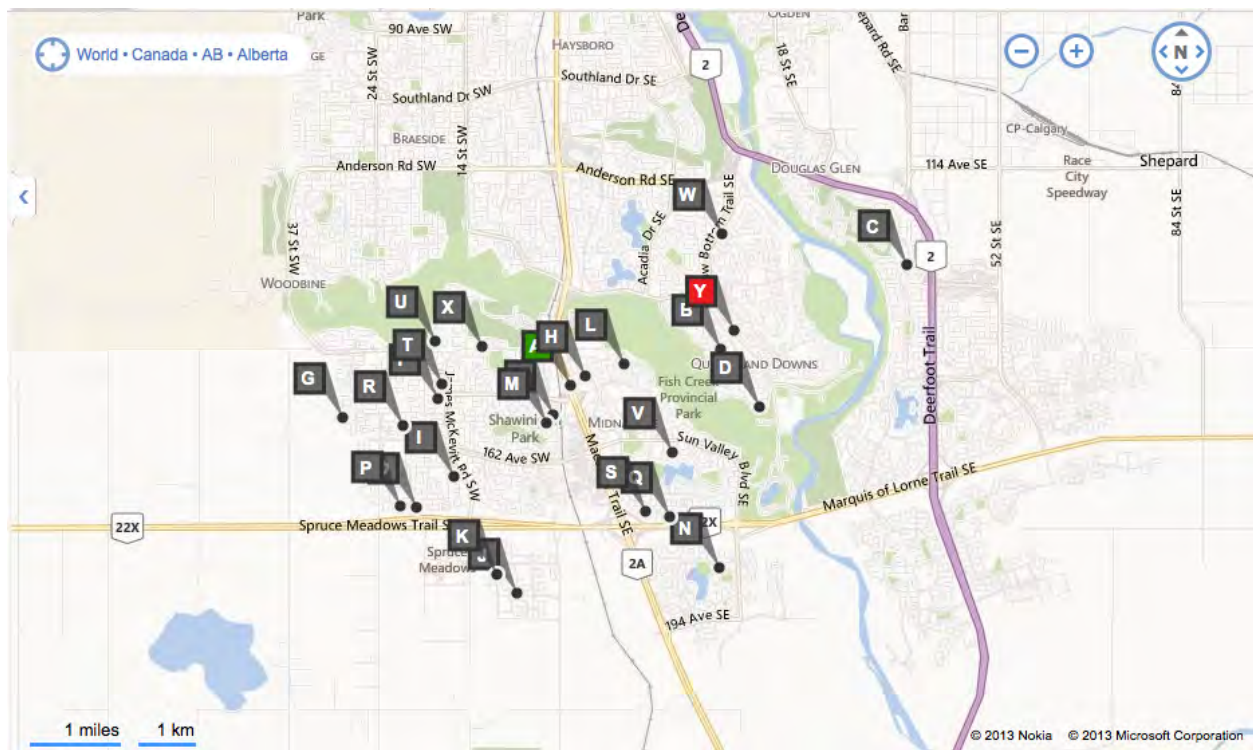


Figure 20 (Forest Lawn)

Average Distance Traveled	Average Travel Time	Total Respondents
3.5 Kms	6.3 Minutes	27

Figure 20.1

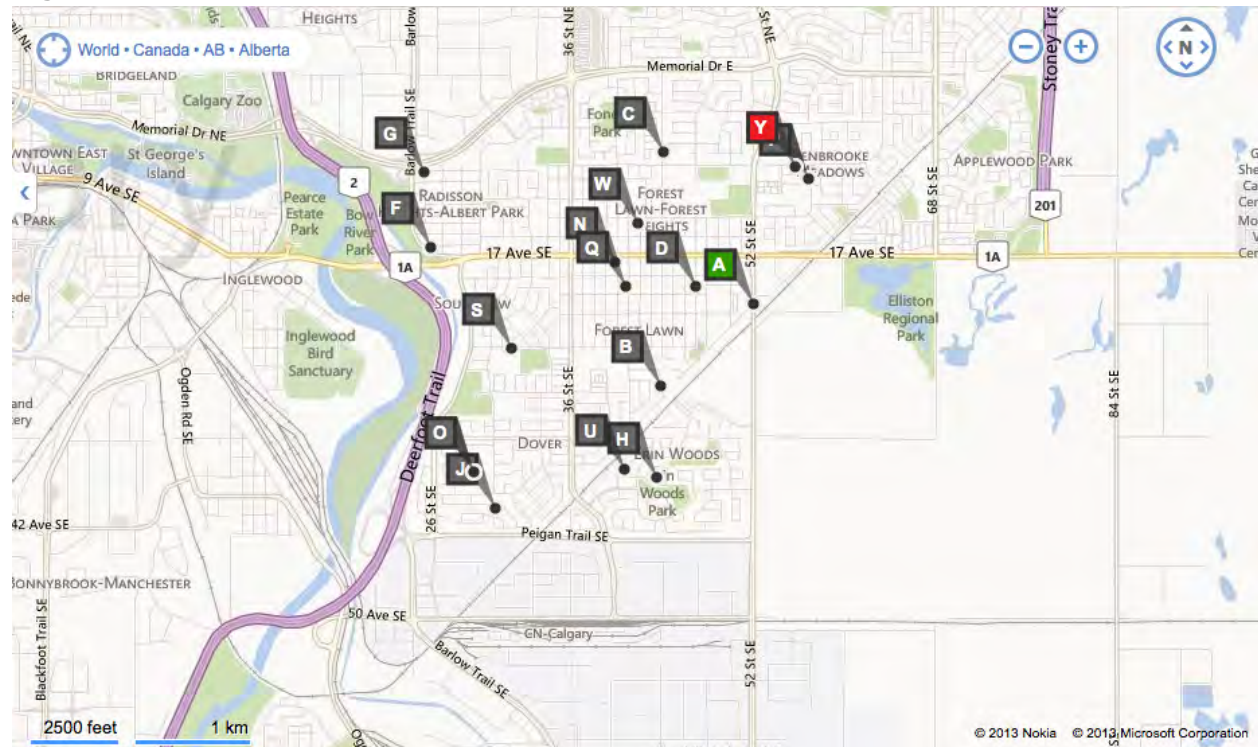


Figure 21 (Happy Can)

Average Distance Traveled	Average Travel Time	Total Respondents
17.7 Kms	17.24 Minutes	15

Figure 21.1

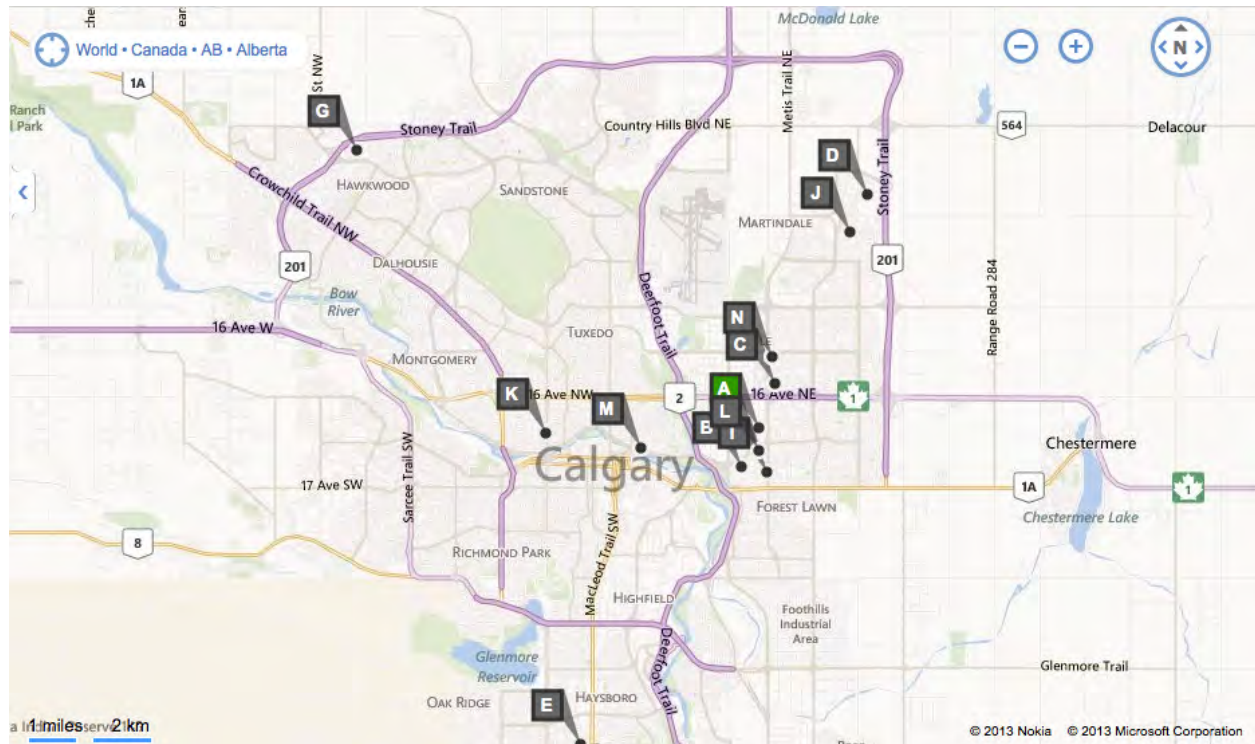


Figure 22 (Marklan)

Average Distance Traveled	Average Travel Time	Total Respondents
6.4 Kms	7.7 Minutes	23

Figure 22.1

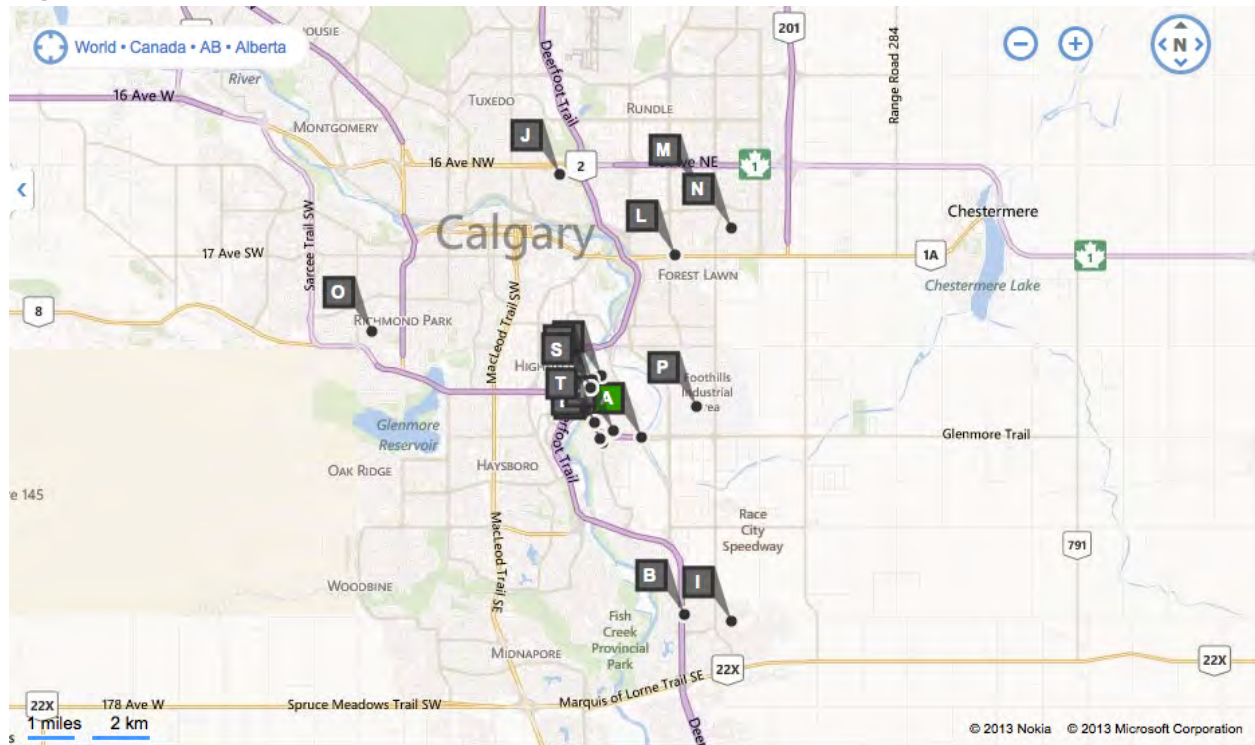


Figure 22 (Spy Hill)

Average Distance Traveled	Average Travel Time	Total Respondents
12.5 Kms	14.5 Minutes	13

Figure 22.1

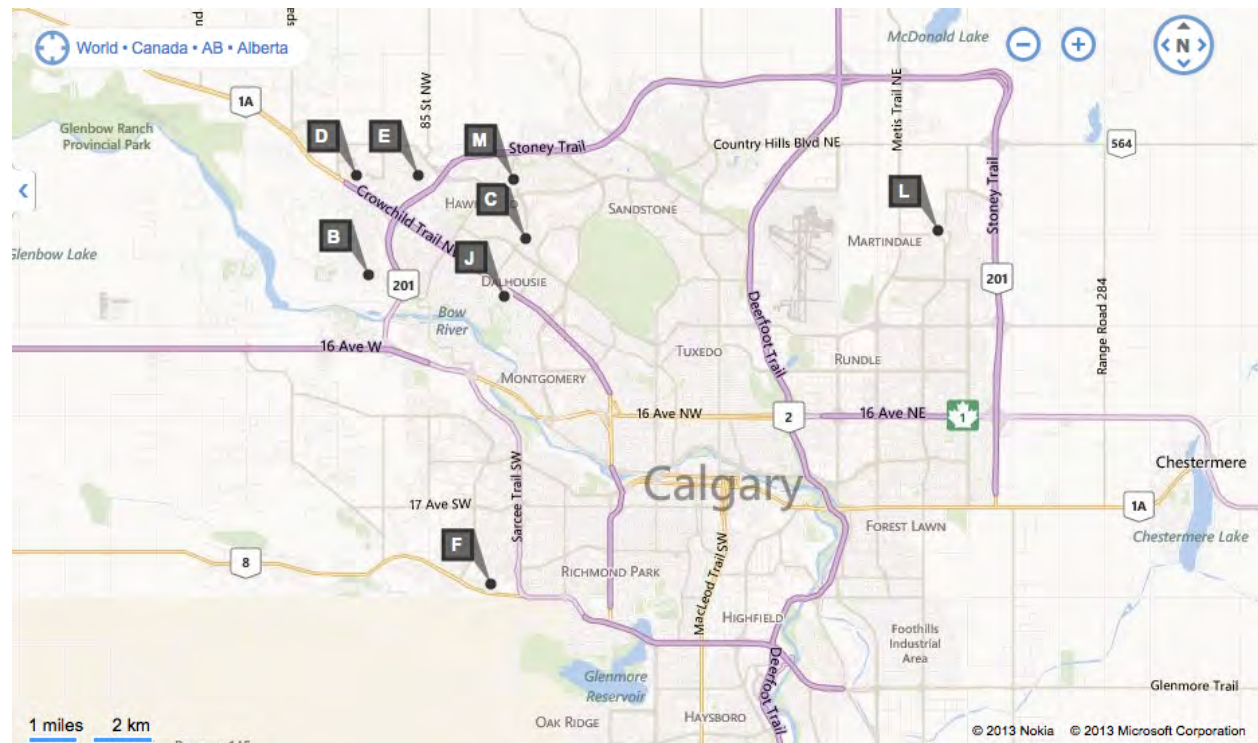


Figure 23 (Sunridge)

Average Distance Traveled	Average Travel Time	Total Respondents
12.5 Kms	14 Minutes	9

Figure 23.2

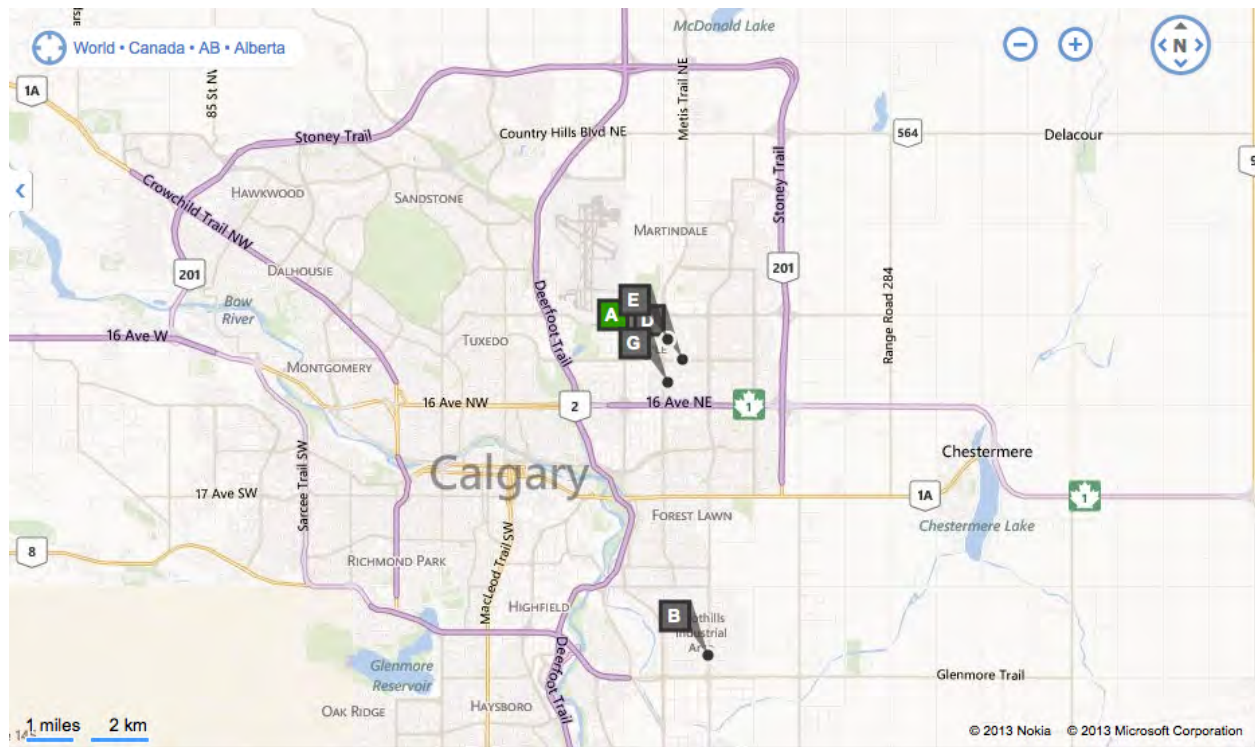
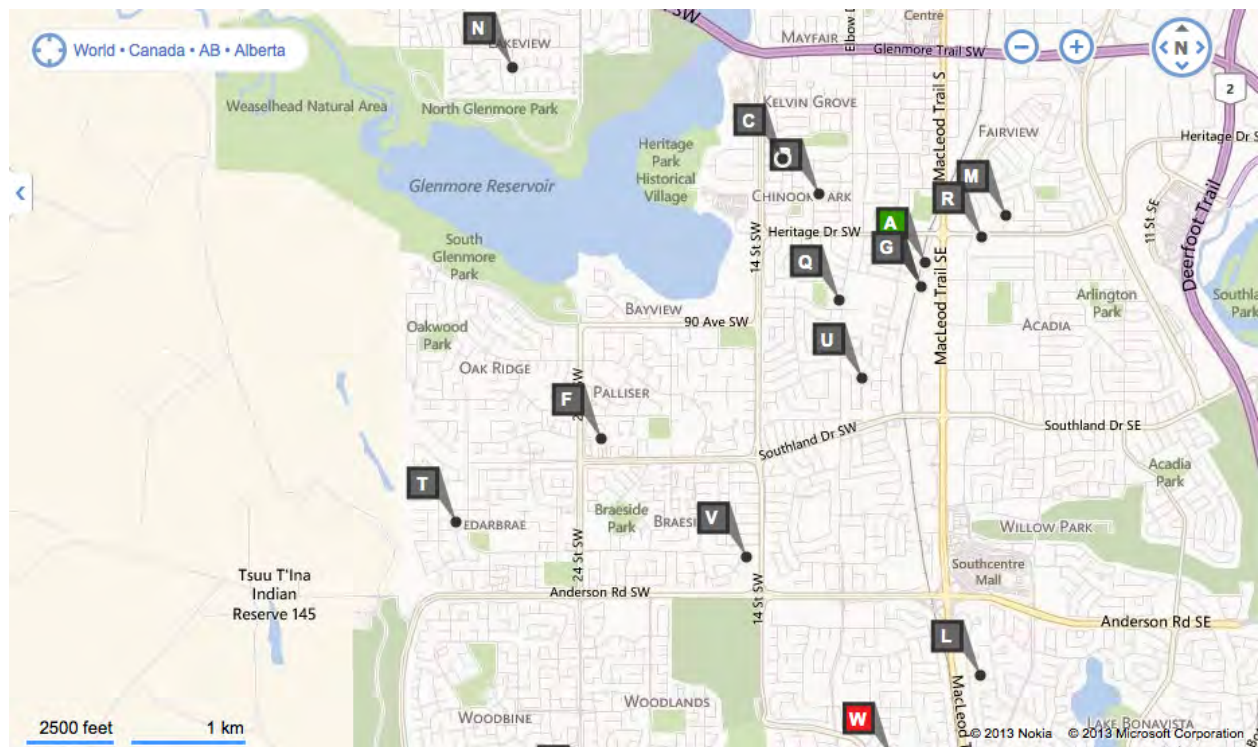


Figure 24 (Trail)

Average Distance Traveled	Average Travel Time	Total Respondents
6.4 Kms	9.4 Minutes	25



Survey Questions

Exit Survey

1. **Record Time Spent in Depot!** * Marked by volunteers
2. **What is the name of the depot you're located at?** * Marked by volunteers
3. **Would you mind sharing your postal code with us for statistical purposes?** * All information you provide to us will be kept confidential. Only members of the research team will have access to it. All data collection, storage and processing will comply with the Canadian Privacy Act.
4. **How satisfied were you with the waiting time to be served at the Depot?** (Scale of 1 – 7, with 7 being very satisfied and 1 being not satisfied at all)
5. **How long was your visit at the Depot?** *Mark only one oval.*
 - < 5 minutes
 - < 10 minutes
 - < 15 minutes
 - < 20 minutes
6. **How accurate do you think your refund was?** *Mark only one oval.* (Scale of 1 – 7, with 7 being very accurate and 1 being not accurate at all)
7. **If the participant answered 1, 2, or 3 for the previous question then continue on with this question and the next, if not proceed to question 9. What is the deposit refund of 1L or less?** Strike or follow a no answer to question on accuracy. If the customer does not think the refund was correct then ask this question – otherwise do not ask it *Mark only one oval.*
 - 5 cents
 - 10 cents
 - 11 cents to 19 cents
 - 20 cents to 24 cents
 - 25 cents
 - Don't Know

8.What is the deposit refund for a container more than 1L? Strike or follow a no answer to question on accuracy. If the customer does not think the refund was correct then ask this question – otherwise do not ask it *Mark only one oval.*

- 5 cents
- 10 cents
- 11 cents to 19 cents
- 20 cents to 24 cents
- 25 cents
- Don't Know

9.How proficient do you feel the computer system made the staff at their job? (Many depots have started to implement POR systems, please answer the following question if the depot you are located in has a POR system) *Mark only one oval.*
(Scale of 1 – 7, with 7 being very proficient and 1 being not proficient at all)

10. Did you notice any signs in the depot that reflected the refund amount per container size? *Mark only one oval.*

- Yes
- No

11. Did you notice this sign anywhere during your visit at this depot?

** Show them the separate page with the logo Mark only one oval.*

- No
- Maybe
- Yes
- Other:

12. On a scale of 1 to 7, with 7 being very satisfied how do the hours of operation at this location work for you? *Mark only one oval.*
(Scale of 1 – 7, with 7 being very satisfied and 1 being not satisfied at all)

13. How satisfied were you with your overall experience at the depot? *Mark only one oval.*
(Scale of 1 – 7, with 7 being very satisfied and 1 being not satisfied at all)

14. Could the staff do anything to improve your experience at the depot?

15. **Would you come back to this particular Depot?** *Mark only one oval.*
Yes
Maybe
If I have to
Never
16. **Why did you choose this depot?** *Mark only one oval.*
Closest to my house
Closest to my workplace
Hours of Operation
Don't know
Accurate refunds
Best customer service
Other:
17. **During your visit at the depot did you notice any brochures or promotional items?** (Some depots offer free materials to help with bottle drives or information about Alberta's beverage container recycling system) *Mark only one oval.*
Yes
No