



BEVERAGE CONTAINER MANAGEMENT BOARD

2015 Depot Exit Interview Survey

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2015 Depot Exit Interview Surveys

I. Background and Methodology

As the regulator of Beverage Container Recycling in Alberta, the Beverage Container Management Board (BCMB) recognizes that the success of the system is based upon consumers returning their empty containers to our bottle depots. Understanding customer perception and behaviours can help the BCMB plan accordingly and target more Albertans to recycle beverage containers. As a result, we have the potential to increase our return rate and keep beverage containers out of the landfills.

In an effort to gather useful data, the BCMB developed the Depot Exit Survey in 2013. Each year since, the survey has been conducted at a variety of depots within the cities of Edmonton and Calgary. In 2015 the BCMB made the decision to target not only city depots, but urban depots as well. This decision was made in the effort to try and reach a broader scope of consumers outside of the city centres.

II. Survey Objectives

The objective of the survey in 2015 was to expand on data collected in previous years while learning about the perceptions and habits of the average consumer.

Through the use of the survey, the BCMB wished to gain an understanding of the following:

- Consumer attitudes toward bottle depots and the beverage container recycling system
- Why consumers visit particular depots
- Areas where consumers felt that the depots could be improve
- The satisfaction associated with receiving an accurate refund
- Depot brand recognition
- Dwelling and income figures and how this relates to returning beverage containers
- Interest in services for dropping off containers and collecting payment at a later date

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III. 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;” The mission of the BCMB “to establish and administer a leading beverage container management system that is innovative, accessible, and cost effective.”

In 2015 the BCMB engaged with the Edmonton Kinettes Club of Edmonton to carry out a series of Depot Exit Surveys. The surveys were conducted at 10 locations randomly selected within the city of Edmonton and 10 locations, randomly selected, in urban centers just outside of Edmonton. Willingness of depot participation also played a large part in determining the depot locations to be used.

The Depot Exit Surveys are meant to gauge the perception of the client as soon as they leave the depot. Being able to gather information immediately after their visit allows for the survey to capture information while it is fresh in their minds. At every depot location 2-3 Kinettes Club members stood outside of the depot with signage promoting the depot surveys. The member engaged with the customer on the way in to the depot and asked if they would like to participate in the survey once they were finished at the depot. Once surveyed, the member would provide each participant with a gift card, thanking them for their participation.

The BCMB recognizes that the use of different depot locations for the surveys is not directly comparable from year to year. We feel it is important to survey a variety of locations to ensure we are capturing a wide range of participants. Our plan moving forward is to alternate each year from Calgary to Edmonton to ensure that our data is relevant. To guarantee we are receiving feedback from customers of smaller depots as well, depots surrounding the cities were also surveyed.

It was found that a large portion of the sampled population was hesitant to provide information regarding their household income. However, it was discovered that the majority of those who return beverage containers maintain a higher level of income. This could infer that people are not just bringing back their containers for the money, but perhaps because they feel it is important to return empties because of the environmental / social benefit.

In terms of new services such as a quick drop off service, most people said they would not use the service due to the fact that they like to receive the cash in hand right away. Other areas measured in the survey included satisfaction with wait times and refund accuracy. The results

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showed that customers were very satisfied with both of these categories. This is important as these are the two major factors that contribute to overall satisfaction of the bottle depot experience.

IV. 2014 and 2015 Comparison:

Comparing the results from 2014 to 2015, it was found that most of the major categories did not change significantly. The average distance traveled to all depots surveyed in 2015 was 8.2 kilometers, only slightly higher than 2014 where the distance traveled averaged 8 kilometers. In 2014 only the metro depots in Calgary were surveyed whereas in 2015 Edmonton city depots and outside urban areas were also evaluated. With the urban areas being more spread-out, it leads us to believe that people travel further in the city of Calgary to get to their depot than those who live in Edmonton. Customers in 2014 and 2015 were very satisfied with their wait times while at the depot (6.6 out of 7 both years).

Results from other major categories such as perceived refund accuracy and willingness to use a quick drop service were also similar from year to year. The percentage of people who noticed refund signage increased from 69% to 74% this year while the amount of people not willing to disclose their household income amount decreased from 53% to 29%, meaning they were more willing to share income information.

A notable difference between both year's results is the average amount of bags that each customer brought to the depot. In 2014 most people brought between 1 and 2 bags and in 2015, most customers were bringing larger loads of between 3 and 6 bags. This could be the result of incorporating urban depots into the sample or simply that people are visiting the depots less frequently.

V. Survey Design and Scope

To ensure the most accurate survey results, the BCMB used a representative sample size of 600 surveys for the City of Edmonton. This number was projected using a 95% confidence level and a 4% confidence interval for the population of Edmonton (approximately 878,000). This would allow for 60 surveys to be completed at each depot within the city. For the depots just outside

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Edmonton, the BCMB based the surveys off the same sample size for simplicity as this would provide more than enough representation to the areas with smaller populations.

In comparison to the 2014 surveys, the contracted organization who the BCMB used to carry out the surveys used a slightly higher confidence interval of 5%. This allowed for 400 total surveys for the city of Calgary which has a much higher population of 1,195,000. We believe that by using a larger sample size (based on a lower confidence interval of 4%) we were able to capture a better representation of the population to ensure the survey results were statistically sound.

Confidence Interval (Margin of Error)	4%	The margin of error is the amount of error that you can tolerate. Statisticians use a confidence interval to express the degree of uncertainty associated with a sample statistic. Lower margin of error requires a larger sample
Confidence Level	95%	A confidence level refers to the percentage of all possible samples that can be expected to include the true population parameter
Population Size	878,000	This is the population size of Edmonton, Alberta (Census, 2011)
Sample Size	600	This is the total amount of surveys completed for 10 locations in Edmonton. 600 extra surveys were completed at 10 depots surrounding Edmonton

The BCMB was able to gather all 600 surveys within the city of Edmonton. One depot location encountered interruption due to road construction, making it difficult to obtain the survey participants needed to complete all 60 surveys. The extra surveys were made up at other locations. In the urban setting, 569 were completed, 31 short of completing the full 600. One depot in a smaller town did not receive enough customers. The volunteers returned the following Saturday to try and reach more participants but were unable to capture 60 customers at that location. The BCMB is satisfied with the amount of total surveys completed as the

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number is significantly higher than other years. In total, 1,169 surveys were completed between the Edmonton depots and those in the surrounding urban areas.

I. Survey Questions

The questions that were prepared for the survey measured different aspects of the respondent's experience. Below is a list of the general types of questions asked on the survey *(Please see Appendix A for the Survey used by the Kinettes Club of Edmonton)*:

- Time spent in the depot
- Satisfaction with time spent in depot
- Accuracy of refund
- Signage that reflected the price for different container sizes
- Awareness of Depot branding
- Satisfaction with the location, hours of operation etc.
- Demographics, type of dwelling they live in, total household income
- Amount of bags they brought to the depot
- Thoughts towards potential new services, and alternative method of refund collection

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VI. Analysis

1. Time Spent in the Depot

The surveys were completed on two separate Saturdays, which tends to generally be the busiest day of the week for most depots. The volunteers made note of the time that the participant entered the depot and the time they exited the depot. The amount of time spent in each depot varied from 1 minute to 2 hours and 31 minutes at different locations.

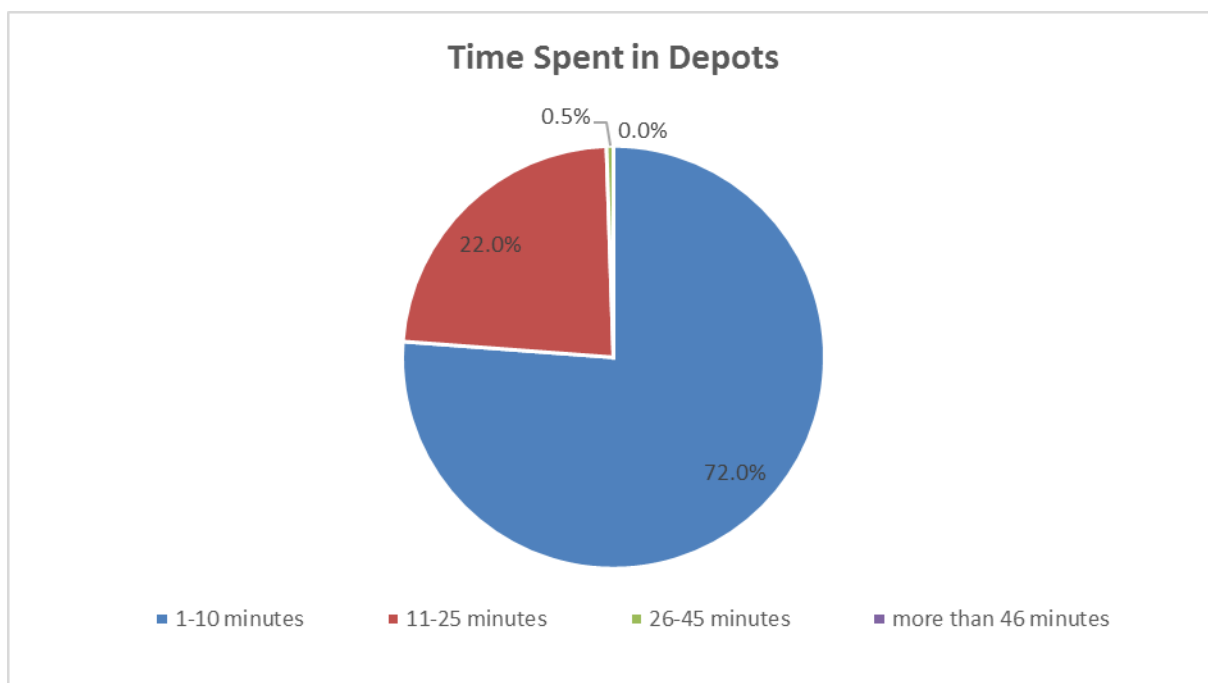
The average time spent in each depot totaled 9 minutes. The average time spend at the 10 city depots totalled 10 minutes, and the average time spent at the 10 depots outside of the city was 8 minutes.

Average Time Spent in Depots (All 20 locations)	9 minutes
Average Time Spent in City Depots (10 Locations)	10 minutes
Average Time Spent in Urban Depots (10 Locations)	8 Minutes

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2014 results showed a 7.4 minute turnover for depot visits. This number is lower than 2015 most likely due to the addition of urban depots.

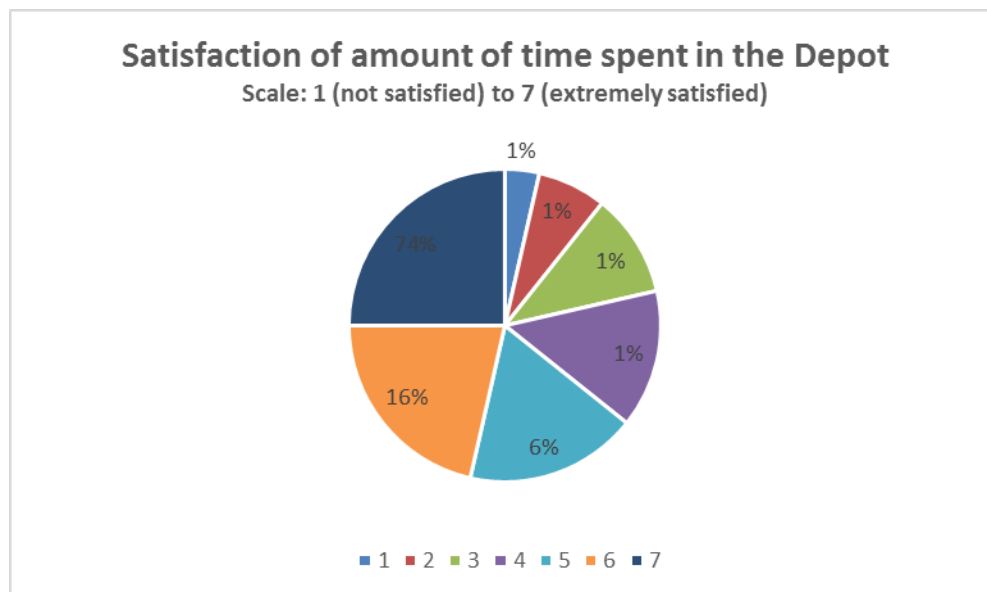
72% of customers spent between 1 and 10 minutes inside the depot. 22% spent between 11 and 25 minutes, and 5% spent between 26 and 45 minutes. Less than 1% spent greater than 45 minutes in the depot.



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Comparing these figures to the level of satisfaction the customers had towards their wait times, it was found that the majority of customers were very satisfied with the amount of time they waited. On a scale of 1-7 (1 being not satisfied at all and 7 being very satisfied) the average response had a value of 6.6.

2014 results also showed a 6.6 satisfaction level.



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2. Travel Time to Depot

On average, it was found that on average consumers travel approximately 8.2 kilometers one way to visit their bottle depot. For the city depots, consumers traveled 5.6 kilometers while traveling further (10.8 kilometers) to urban depots.

Comparing urban and city areas, it is likely that that urban areas draw from larger more distant surrounding areas. Those who visit the city depots may live close to or within the city limits which would account for a decrease in distance traveled.

In 2014, the average person traveled 8 kilometers to their depot of choice. Slightly lower than the average for 2015; however, this shows that people drive further in the city of Calgary (8 km) to get to their depot in comparison to Edmonton (5.6 km).

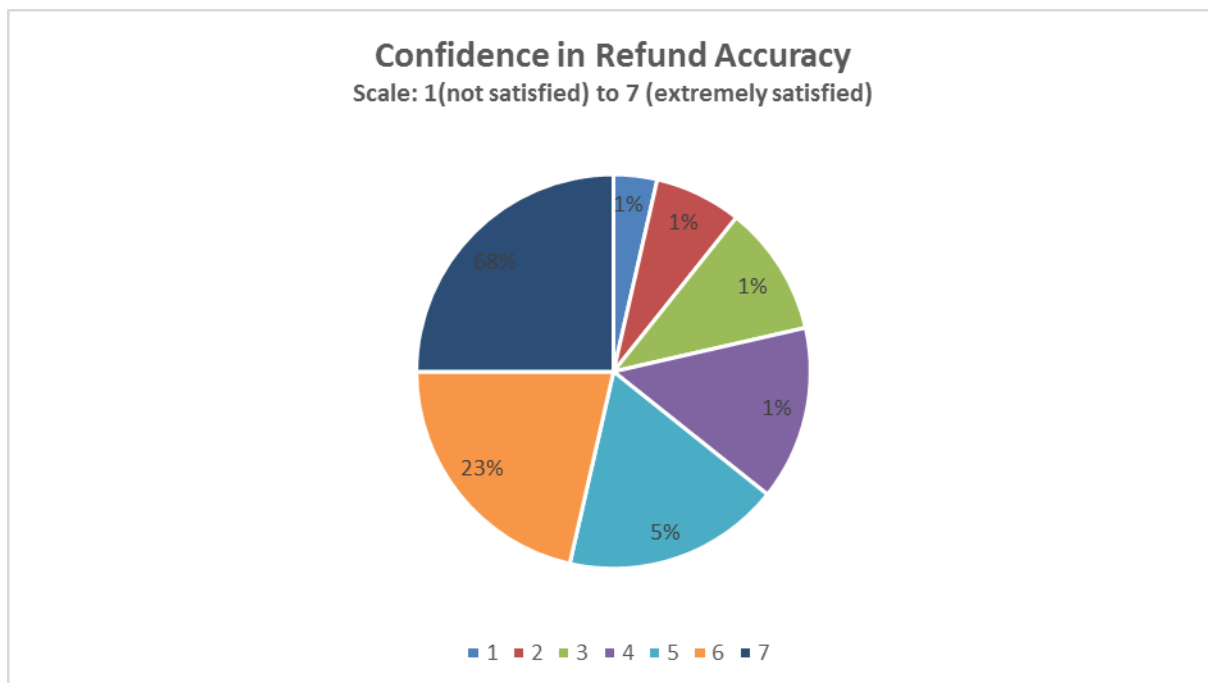
Depot Type	Distance Traveled (km)
City	5.6
Urban	10.8
All	8.2

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3. Refund Accuracy

The customers were asked to rate how accurate they thought their refund amount was at every depot. The results showed most people believed they received an accurate refund. The average response for this question on a scale of 1-7 (1 being not accurate and 7 being completely accurate) was a 7. This leads us to believe that there is a high level of confidence in the refund system. The chart below shows the respondents' answers.

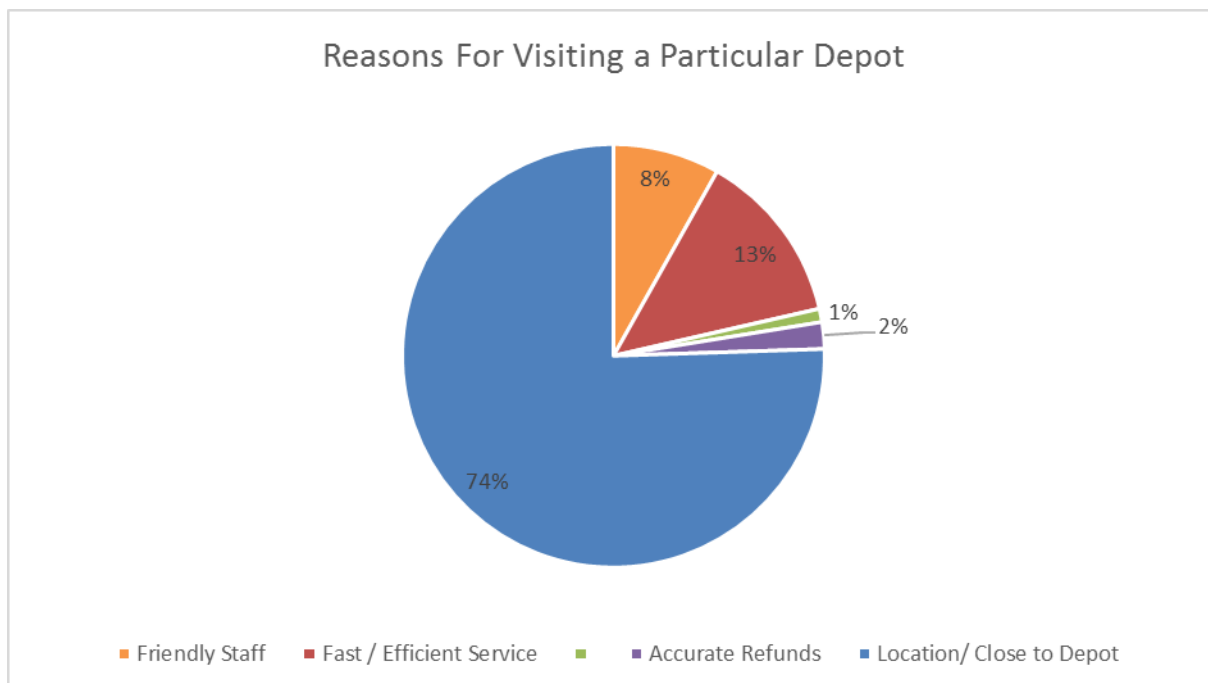
2014 results showed that the average response for refund confidence was 6.3, slightly lower than 2015 at 7.



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4. Reasons Customers Visit a Particular Depot- What keeps them coming back?

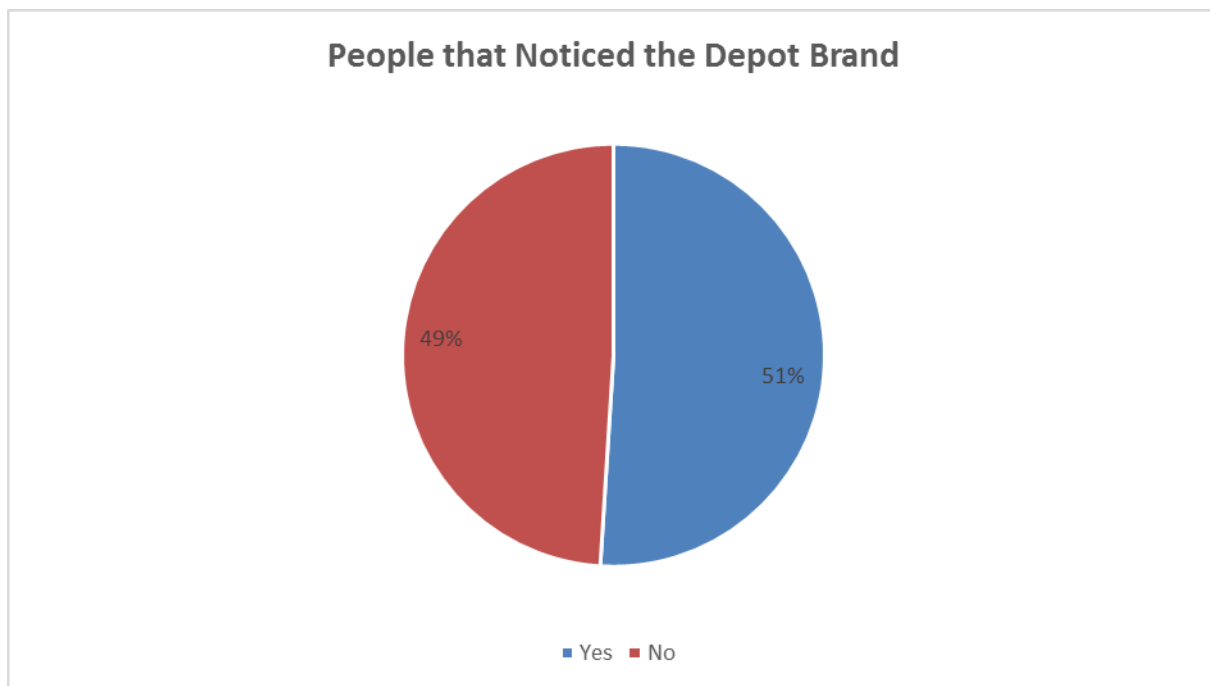
Each participant was asked to provide a reason that they chose to visit the depot they were at. The top three choices were undoubtedly proximity to the depot (convenient location), efficiency (speed of their visit), and cleanliness/organization of the depot. 73% of the participants responded that a convenient location was the reason they returned to that depot. This shows the importance of sufficient depot coverage within the system.



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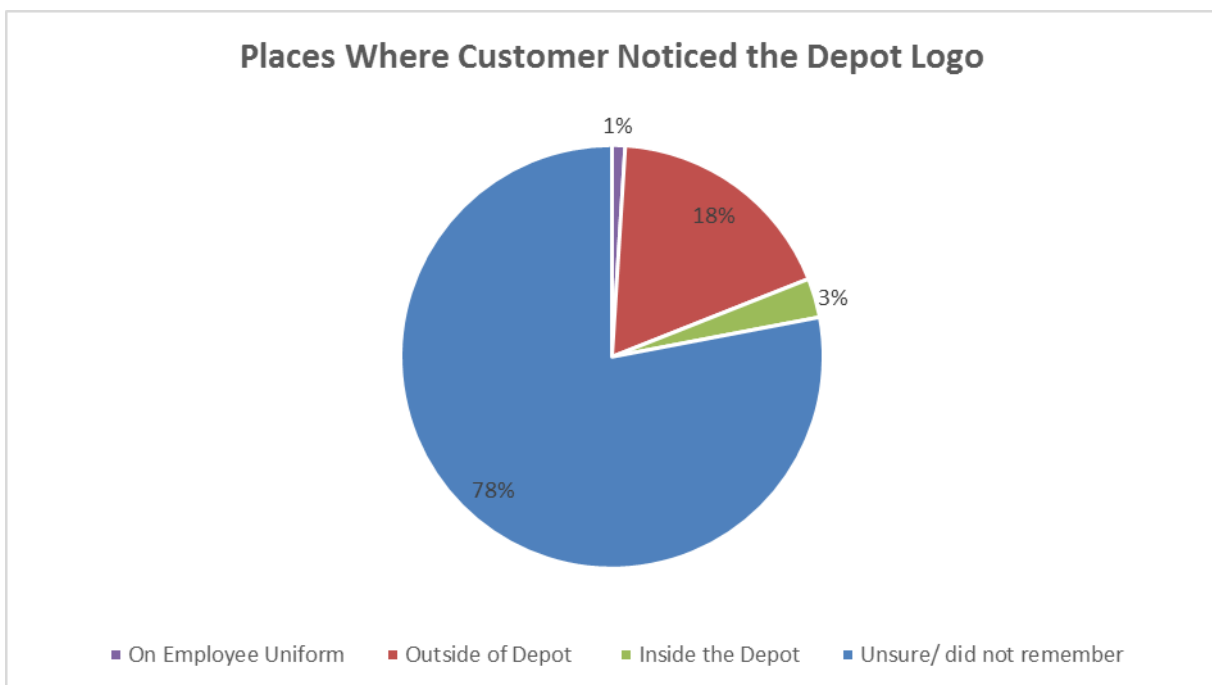
5. Notice of Depot Logo

Of all 1,169 people that were surveyed, 51% of those said that they noticed the Depot Logo somewhere on the premises. 49% of the respondents said that they did not see the notice the logo.



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Of those that said they did notice the logo, 1% said they noticed it on the employee uniform, 3% said they noticed it somewhere inside the depot, 18% said they noticed it somewhere outside the building and 78% said they did see it but were unsure where. This shows that depot branding is indeed effective, even if the customers don't recall the exact location, they still recall seeing it.

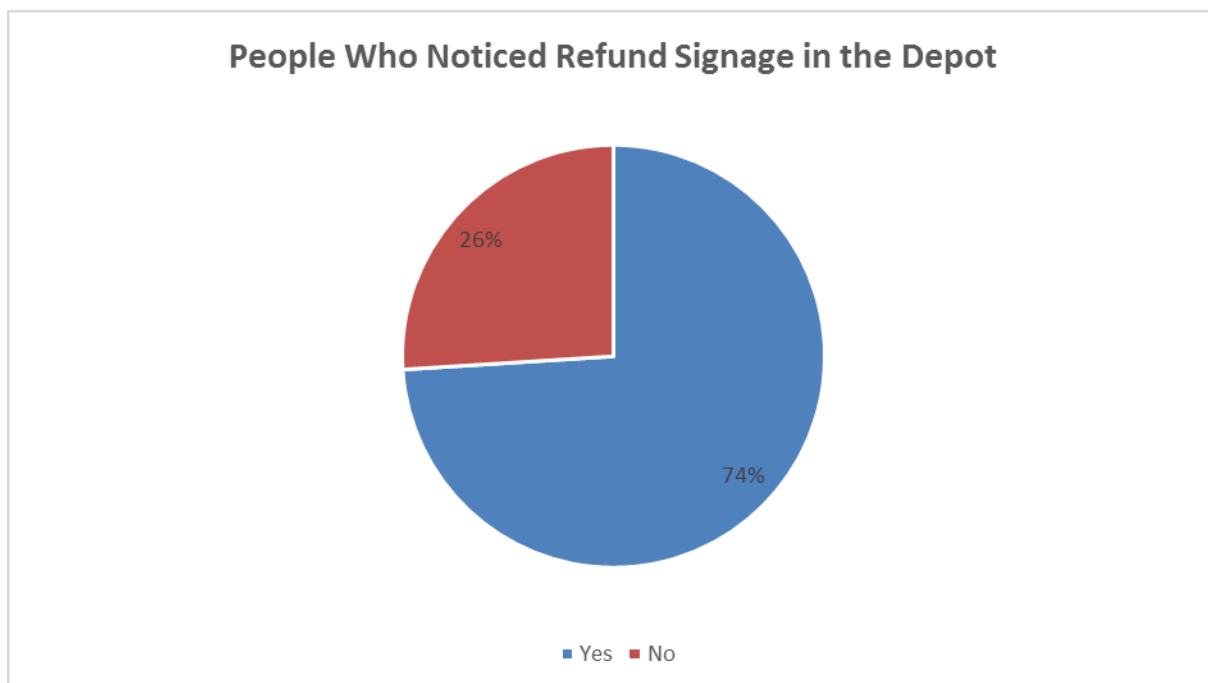


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6. Notice of Depot Signage

The participants were asked to tell the volunteer whether or not they noticed any signage in the depot that displayed refund amounts. 74% said they did notice signage related to refund amounts and 26% said they did not notice anything.

31% of the respondents in 2014 said they did not see the depot signage, which shows a slight improvement in 2015 with only 26% who did not notice the signage.

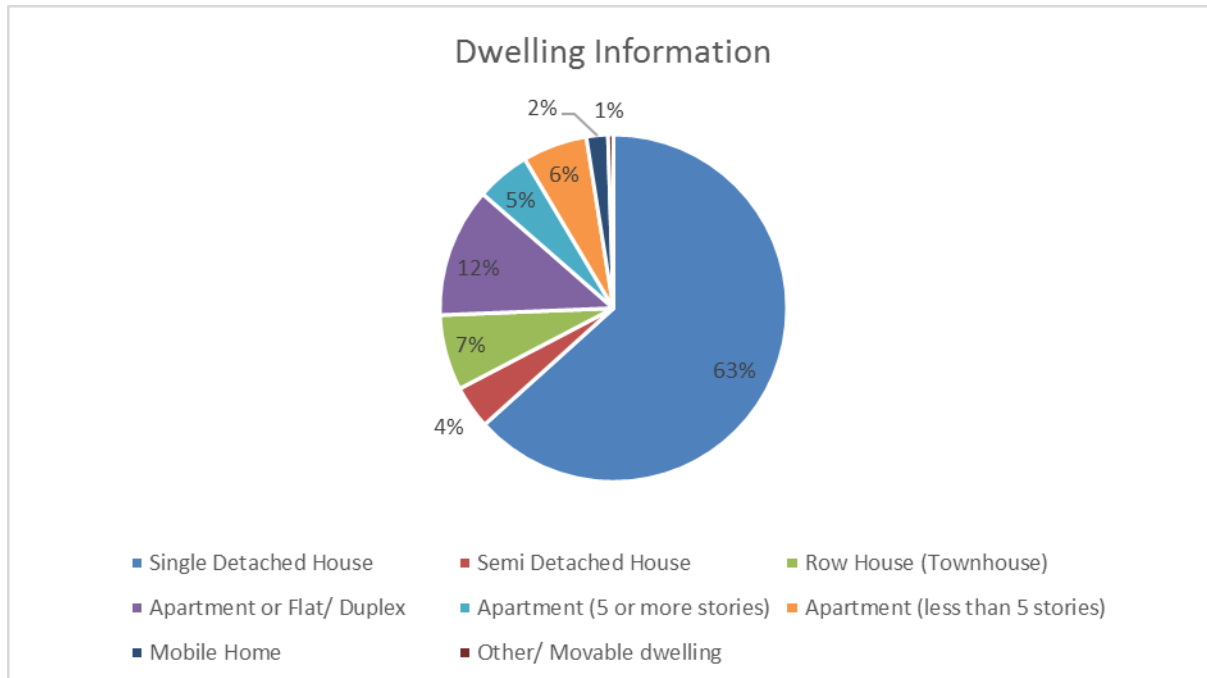


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7. Dwelling Information

Customers were asked to provide their housing information to help understand what type of housing the average customer lives in. 63% of customers responded that they live in single family housing. This leads us to believe that they would have sufficient amounts of room to store containers and the potential to bring in larger orders. Apartment (or flats) and duplexes followed with 12%. The remaining dwelling types fell between 7% and 1%, showing that most customers have the ability to store more containers year round without needing to dispose of them because of limited space.

In 2014, 65% of respondents stated that they lived in single family housing. This number is very close to the 2015 results at 63%.

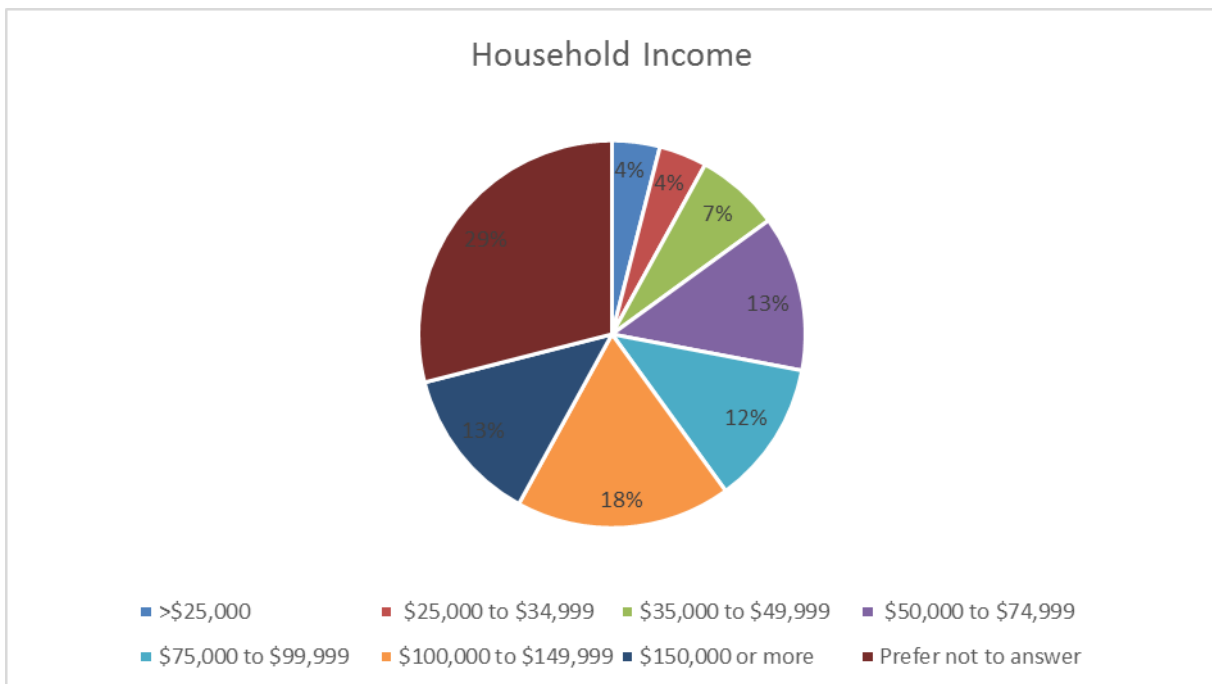


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8. Total Household Income

When asked about household income during the survey, 29% of the customers said that they prefer not to disclose their income. The highest percentage of people that did provide the information stated they had a total household income of \$100,000 to \$149,999 at 18%. The second highest categories were incomes of \$50,000 to \$74,999 and \$150,000 or more, both at 13%.

In 2014, customers were significantly more reluctant to share their income with the volunteers (53% who would not share which dropped in 2014 compared to 29% in 2015).

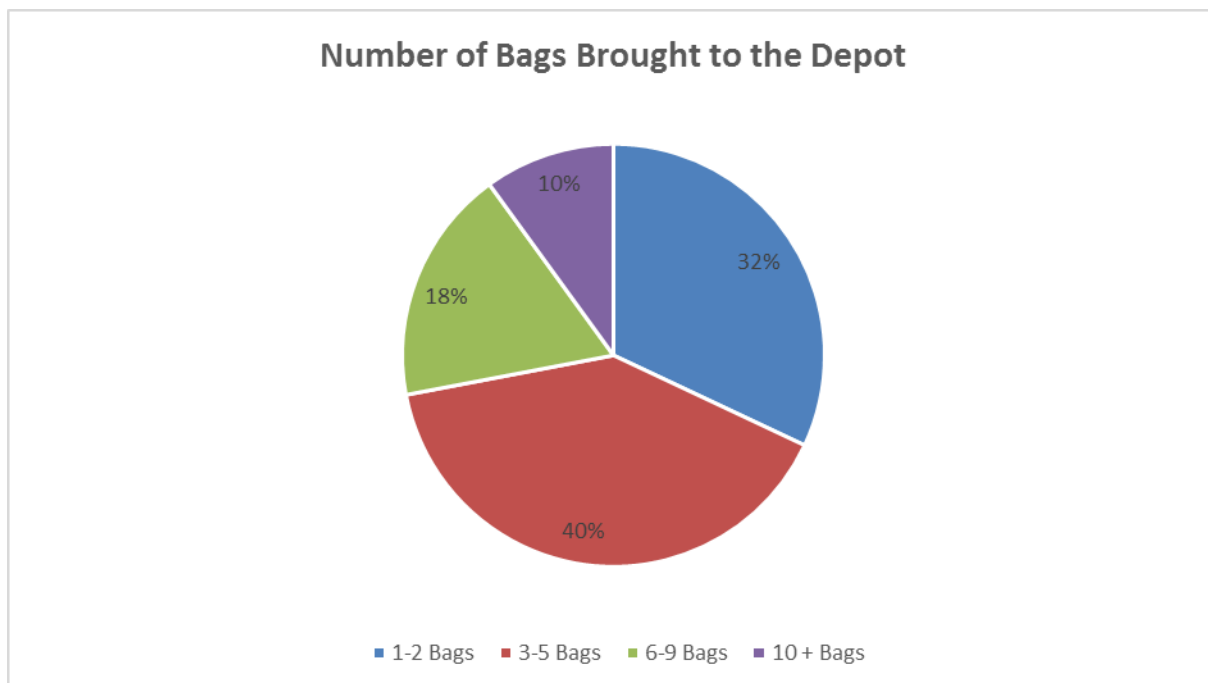


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9. Number of Bags Brought to the Depot

Upon review it was found that 40% of customers brought between 3 and 5 bags of containers to the depot. 32% brought between 1 and 2 bags, 18% brought between 6 and 9 bags and 10% brought over 10 bags. With over 3/4 of the customers bringing in between 1 and 5 bags, we can make the assumption that they may be coming more frequently than those with a high amount of bags.

2014 results showed most people returned between 1 and 2 bags as compared to 2015 where most customers brought in larger loads of 3-6 bags. This could be the result of introducing urban depots into the survey where people make less frequent trips with larger amounts of containers.

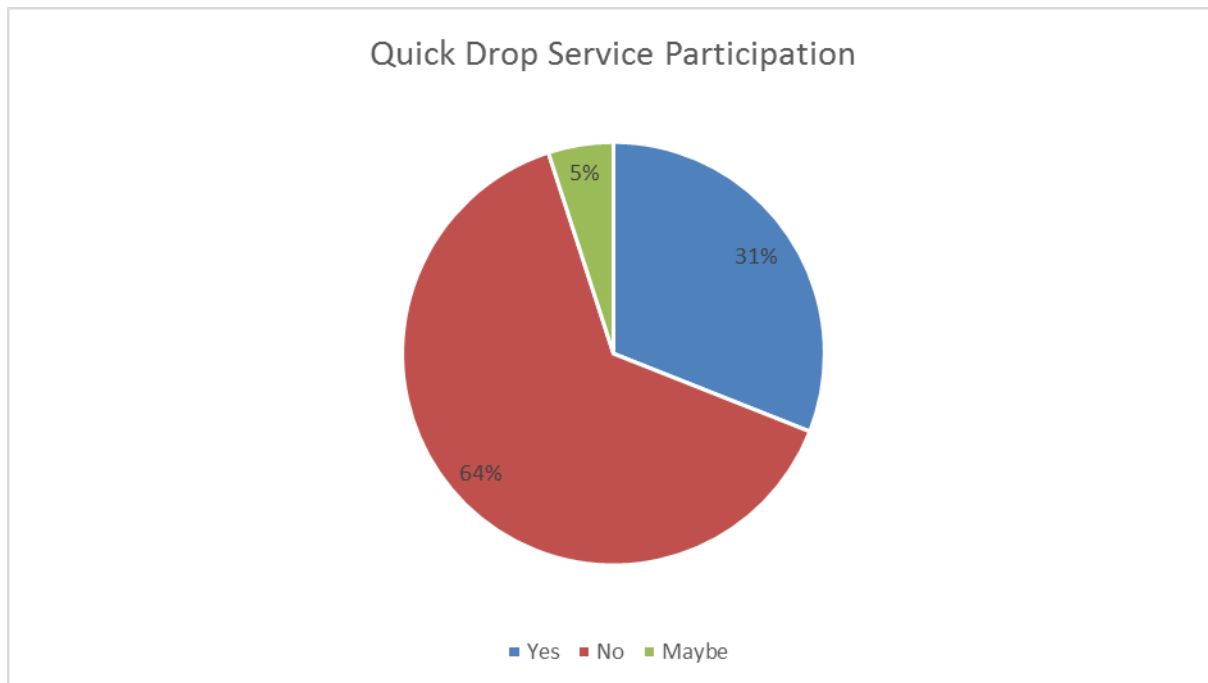


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10. Quick Drop Service

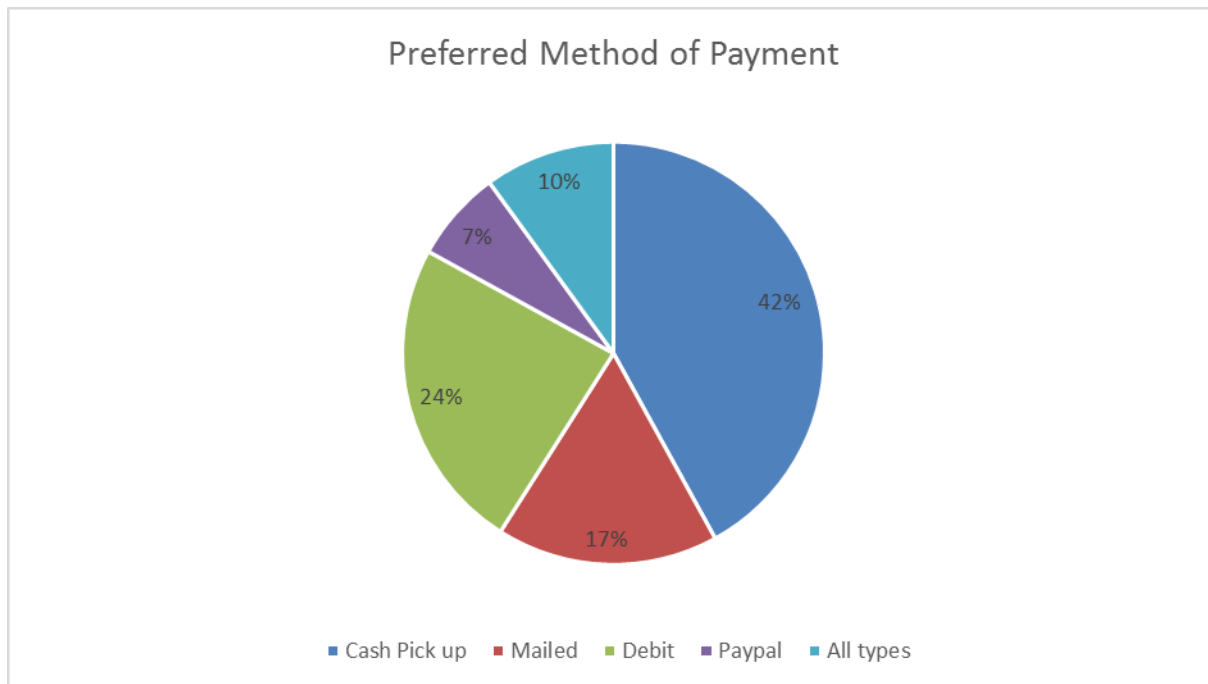
Customers were asked if they would use a service that allowed them to drop off their containers and redeem the refund at a later date. The survey showed that 64% of the customers would not be interested in a service like this, 31% said that they would use the service, and 5% said that were unsure if they would use it or not.

In 2014, 36% of customers said they would use the service indicating a slight decrease in willingness to use such a service in 2015.



11. Preferred Method of Payment for Quick Drop

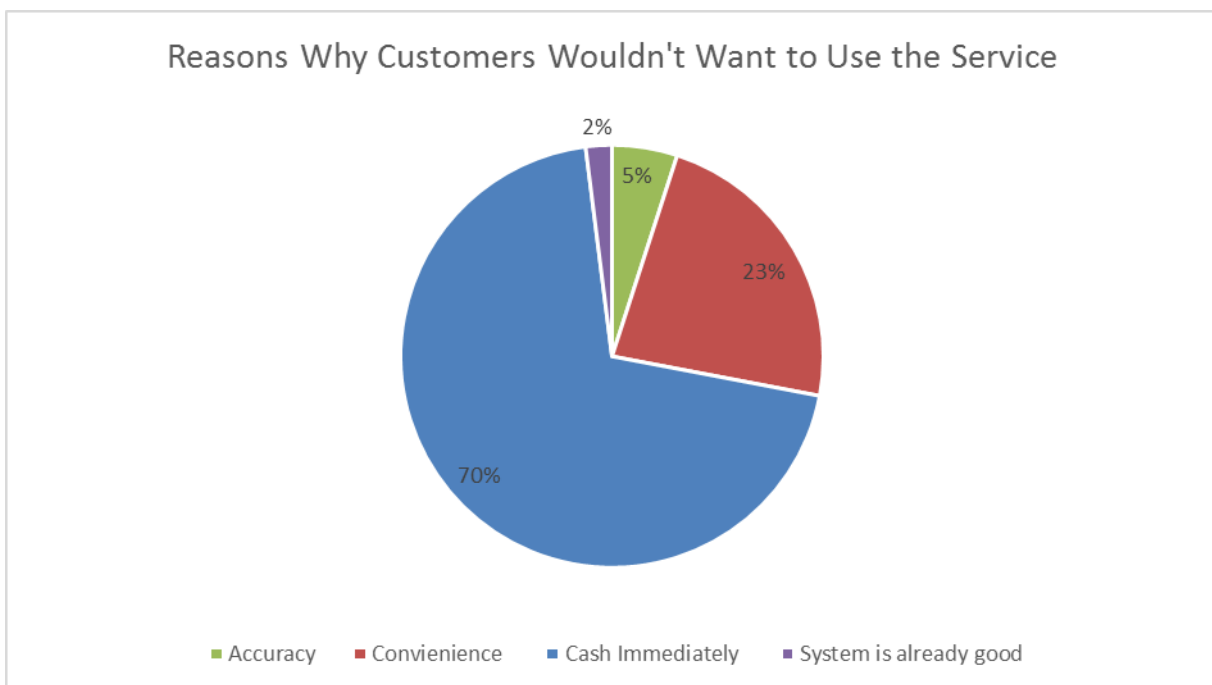
Of the customers that said they would use the service, 42% said they would prefer to pick up their funds in cash while 17% said they would like a cheque mailed to their home. This demonstrates that although other payment methods are available, cash is still the preferred method of payment among customers



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12. Reasons Why Customers Wouldn't Use the Service

Of the customers that said they wouldn't use the service, 70% of them said it was because they want the cash right away. 23% of the respondents said it was convenient to make only one stop and 5% said they would be concerned about refund accuracy. 2% of the customers said the system works well as it is so there is no need for change. This illustrates that customers prefer a service that they can complete in one step and leave with cash in hand.



Summary

The Depot Exit Survey continues to provide insight on how the consumer perceives the bottle depot industry. It provides the BCMB with the opportunity to enhance the consumer experience through changes and improvements that come from survey results.

Appendix A



BCMB 2015 Exit Survey

1. Record the time spent in the depot.

Just record time on sticky note and time that the participant starts the survey

Time in	Time out
<input type="text"/>	<input type="text"/>

2. 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.

3. How satisfied are you with the time you spent in the depot (from waiting to when you received payment)?

Not fast at all 1 2 3 4 5 6 7 Very fast

D D D D D D D

4. How accurate do you think your refund was?

Not accurate 1 2 3 4 5 6 7 Very accurate

D D D D D D D

5. Do you recall seeing this logo anywhere in the depot? If yes, where did you see the logo?

6. Did you notice any signs in the depot for the refund amounts for different sizes of containers? (Yes or No)

7. What do you like about this depot that would keep you coming back?

Appendix A

8. What kind of dwelling do you live in? (House, apartment, etc.)

- Single detached house
- Semi detached house
- Row house (Townhouse)
- Apartment or flat in duplex
- Apartment in a building that has five or more storeys
- Apartment in a building that has fewer than five storeys
- Mobile home
- Other movable dwelling (Tent)
- Not Applicable

9. What was your total household income before taxes during the past 12 months?

- Less than \$25,000
- \$25,000 to \$34,999
- \$35,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Prefer not to answer

10. How many bags did you bring into the depot today?

11. If a new service was offered where you were able to drop your containers off without waiting in line now, and collect your money at a later date, would you use this service?

(Yes or No)

If they answer yes go to the next question. If they answered no skip to the last question (13).

12. If the participant answered yes, what would be your preferred form of payment?

- ☐ Cash pick up
- ☐ Cheque mailed
- ☐ Debit
- ☐ Paypal

13. If the participant responded no, why not?