

August 2023

REPORT ON

# 2023 BEVERAGE CONTAINER DEPOT EXIT INTERVIEW SURVEY

Prepared for the Beverage Container Management Board by PRA Inc.



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# METHODOLOGY

- The BCMB reached out to 30 beverage container depots in Alberta who agreed to take part in this study.
- In 2021 and 2022, as a result of the pandemic, the survey had been fielded online only rather than in person. PRA developed business card handouts with a link to the online survey, each with a unique survey PIN. The cards were distributed to each depot, who then handed them out to customers who made a beverage container return, with a goal of 60 completed surveys from each depot. Survey participants had the option of accepting a \$5 e-gift card upon completion.
- In order to maximize responses, this methodology was repeated for the 2023 study, however, where some depots were unable to achieve their online survey target, PRA interviewers visited in person to supplement the online survey via self-completed surveys by customers on electronic tablets.
- The online survey ran from May 5 to July 12, 2023 (n = 1,120), while interviewers collected data in person at 12 depots over three weekends, from June 23 to July 9, 2023 (n = 336).
- The target of 60 completed surveys was reached at 18 of the 30 depots. In total, the study resulted in 1,456 completed surveys across all participating depots.
- For a profile of 2023 respondents and depot locations, please see Appendix A.

# REPORTING NOTES

- All results in this report are presented out of the total n-size (2023, n=1,456; 2022, n=1,292; 2021, n=1,357) unless otherwise stated. Comparisons to 2021 and 2022 are provided where possible.
- Percentages in tables and graphs may not always sum to 100% due to rounding.
- In some charts, values of 2% or less are not shown in order to increase readability.
- All differences between groups have a p-value of less than .01 unless otherwise stated.

# CUSTOMER EXPERIENCE

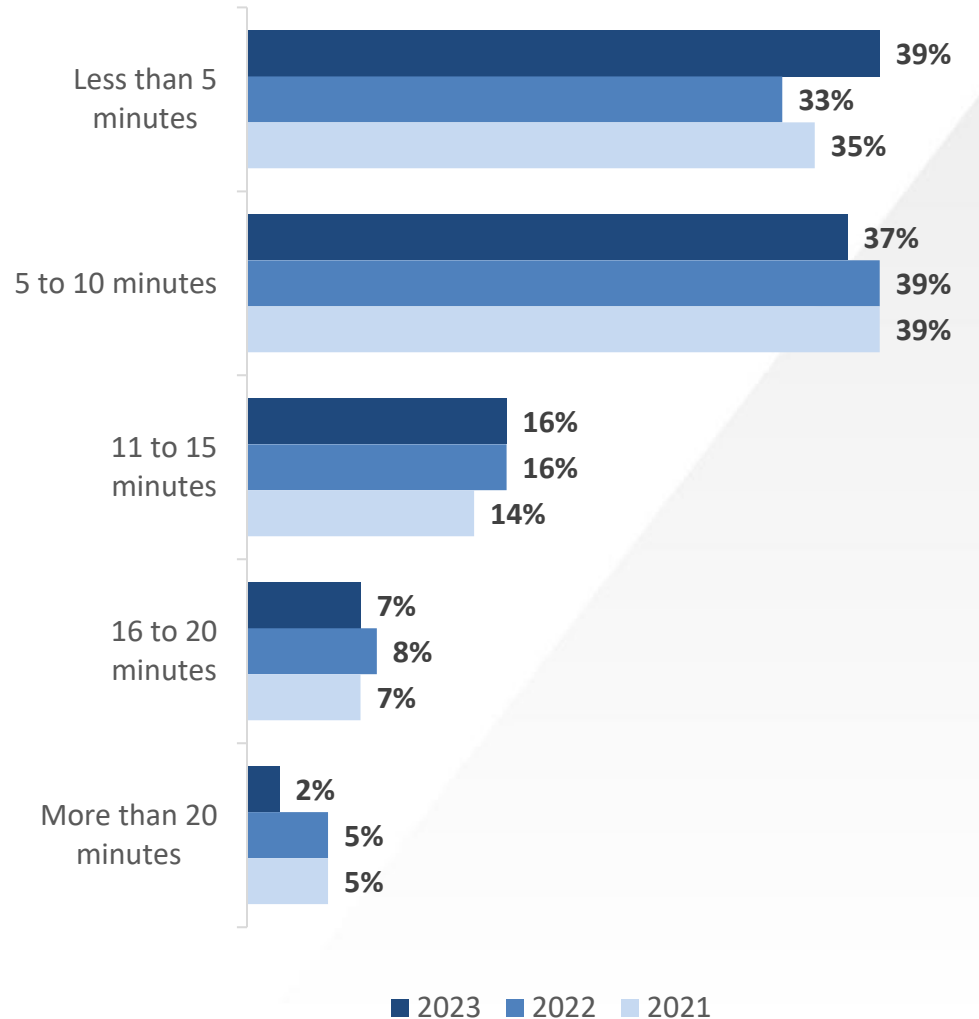
# TIME SPENT AT DEPOT

Q6. Approximately how long did you spend in the depot (or waiting in the drive-thru) for this visit?

- Three quarters of customers say they spent 10 minutes or less at the depot during their recent visit, including 39% who visited for less than five minutes. The proportion visiting for less than five minutes is up slightly from 33% last year.

## Demographic insights:

- Interestingly, customers 18 to 29 years old and those 65 and older tend to be more likely than those in other age groups to spend less time at a depot (10 minutes or less).
- Previous year's results showed customers spending more time in rural or urban depots, however, there is virtually no difference between depot locations in 2023.



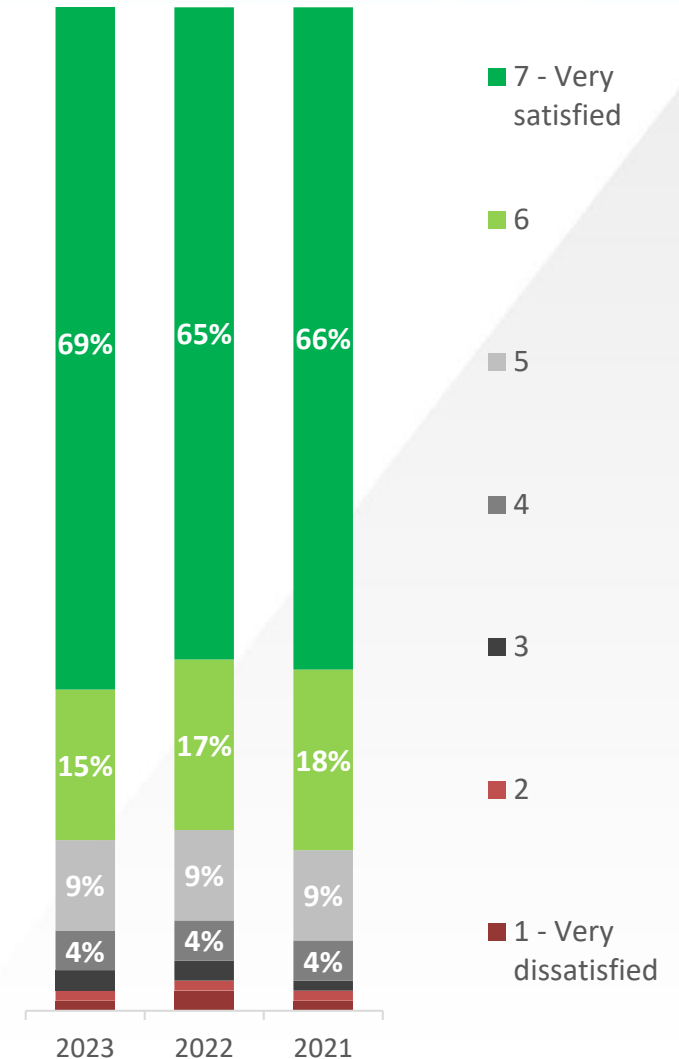
# SATISFACTION WITH TIME SPENT AT DEPOT

Q5. Using a scale of 1 to 7, where 1 is very dissatisfied and 7 is very satisfied, how satisfied or dissatisfied are you with the amount of time you spent in the depot, from the time you entered the depot to the time you received your refund?

- Generally, depot customers were satisfied with the amount of time they spent at the depot, including over two thirds who were very satisfied. These results are similar to previous years, with a slight increase in those who are very satisfied.
- As would be expected, there continues to be a negative correlation between time spent at the depot and satisfaction with time spent in 2023, as satisfaction drops from 91% of customers who were at the depot less than five minutes were satisfied to 52% of those who were at the depot for over 20 minutes.
- Among those who were at the depot for 10 minutes or less, 88% say they were satisfied with the total time spent at the depot.

## Demographic insights:

- Customers 45 and older were more likely to be satisfied with the amount of time spent in the depot than younger customers.



# RECEIVING PAYMENT

Q7. Did you receive your refund payment on the same day you returned your beverage containers?  
Q8. Were you told when to expect your payment at the time you received your beverage containers?\*

Q9. How many days did it take to receive your payment?\*

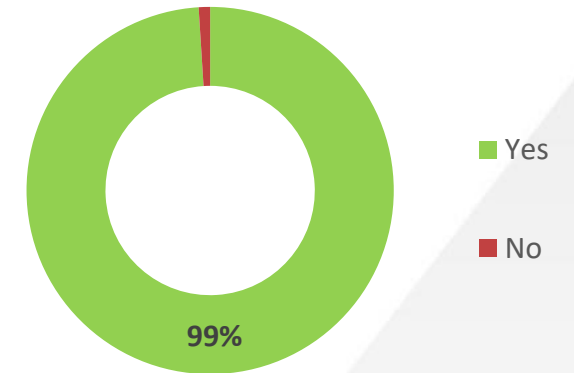
Q10. What type of payment did you receive?\*

- Virtually all depot customers reported receiving their payment on the day they made returns, with only 17 total customers reporting otherwise.
- The majority (n = 14) of these customers reported not yet receiving their payments, with two receiving payment the next day and one receiving payment more than three days later. Nine of these 17 customers say they were told when to expect payment when returning their containers.
- The majority of customers received cash payments, while just over one quarter received ATM tickets and only five received payment by e-transfer.

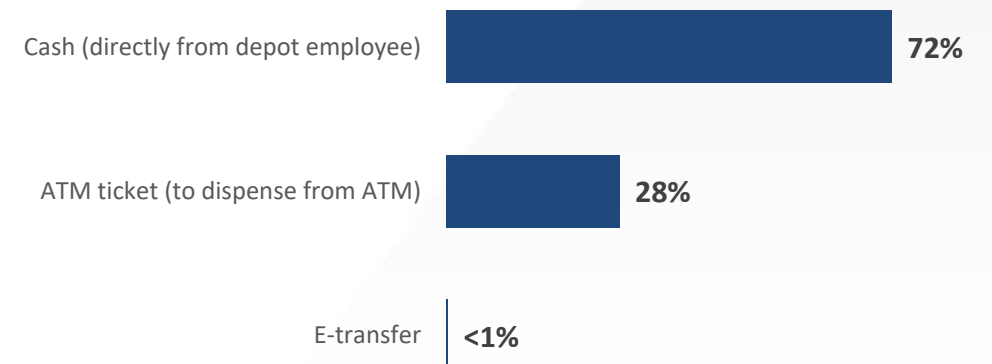
## Demographic insights:

- Customers who visited depots in rural areas and those 65 and older were more likely than their counterparts to receive cash payments versus ATM tickets.

### Received payment same day



### Type of payment



\* Base: Those who did not receive their refund payment on the same day (2023, n=17).

\*\* Base: Those who received refund payment (2023, n=1,442).

# RETURN AMOUNT AND ACCURACY

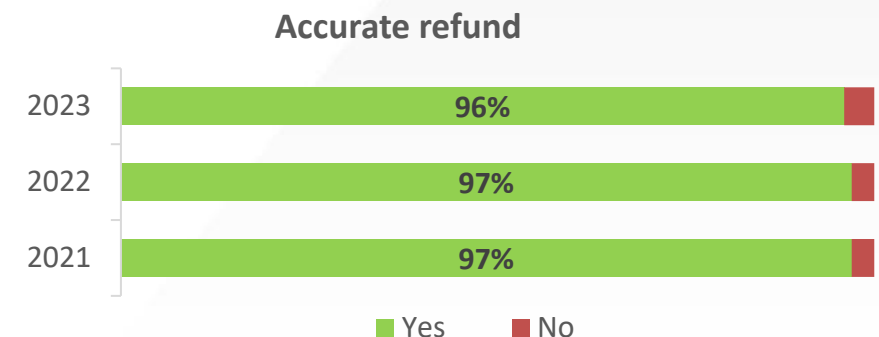
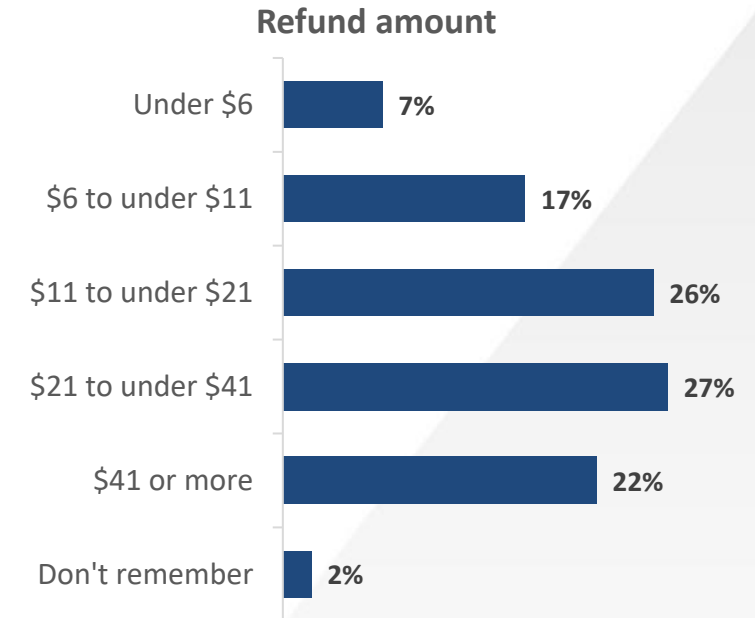
Q11. Approximately how much did you receive for a refund during this visit?

Q12. Do you believe your refund was accurate?

- The majority of depot customers received a refund somewhere between \$11 and \$41, with nearly one-quarter receiving a refund of \$41 or more.
- Similar to previous years, nearly all depot customers claim that their received refund amount was accurate. In 2023, 46 respondents (3%) claimed their refund was less than it should have been, while six (<1%) believe they received too much.

## Demographic insights:

- Generally, customers under 30 or 65 and older, and those living in an apartment or condo, are more likely to have received a smaller refund





# RETURNING AND DESTINATION DEPOT VISITS

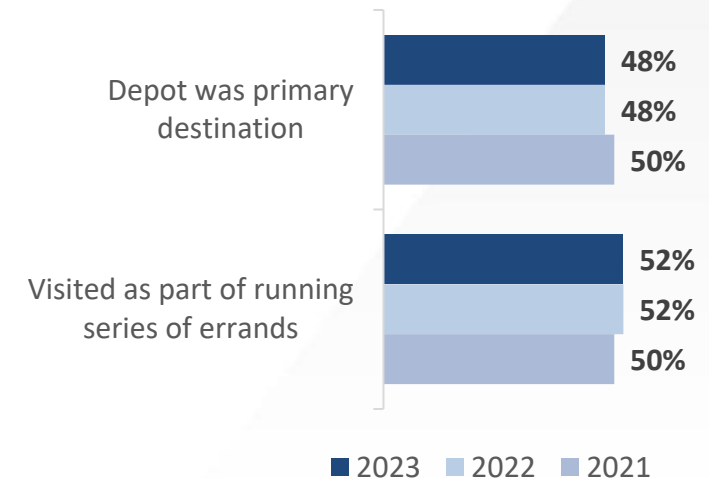
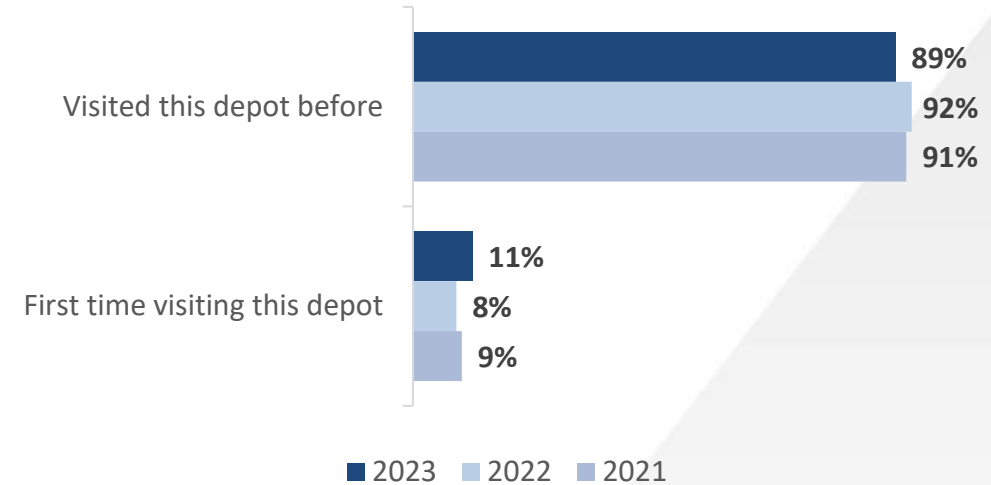
Q13. Was this your first time visiting this depot location?

Q15. Which of the following best describes your visit to this depot?

- Similar to results from previous years, the majority of customers visited a depot that they had been to before.
- Once again, there was a nearly even split between those visiting the depot as their primary destination and those visiting as part of a series of errands, with a slight majority reporting the latter.

## Demographic insights:

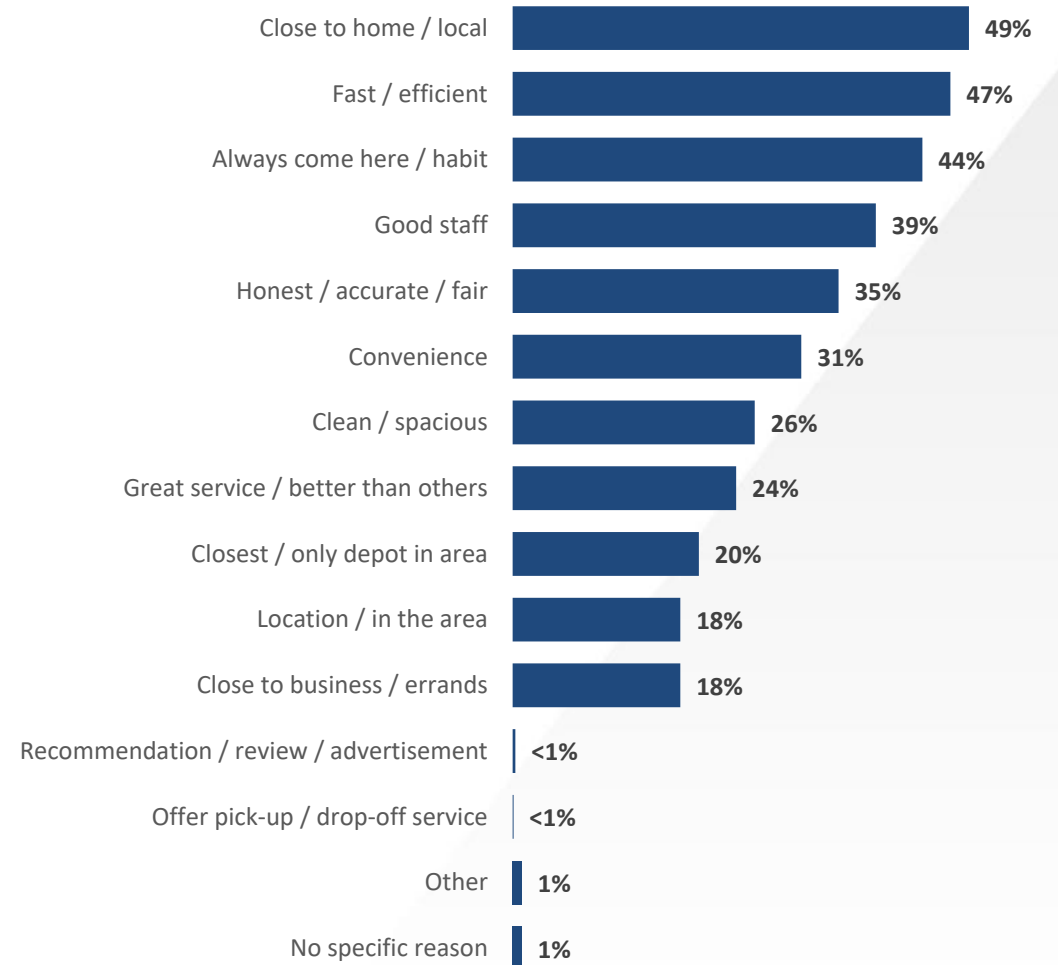
- Not surprisingly, as age increases, the likelihood of a customer visiting a depot for the first time decreases.
- Those visiting urban depots were less likely to say visiting the depot was their primary destination than those in metro or rural areas.



# REASON FOR VISIT

Q14. Why did you choose to visit this specific depot?

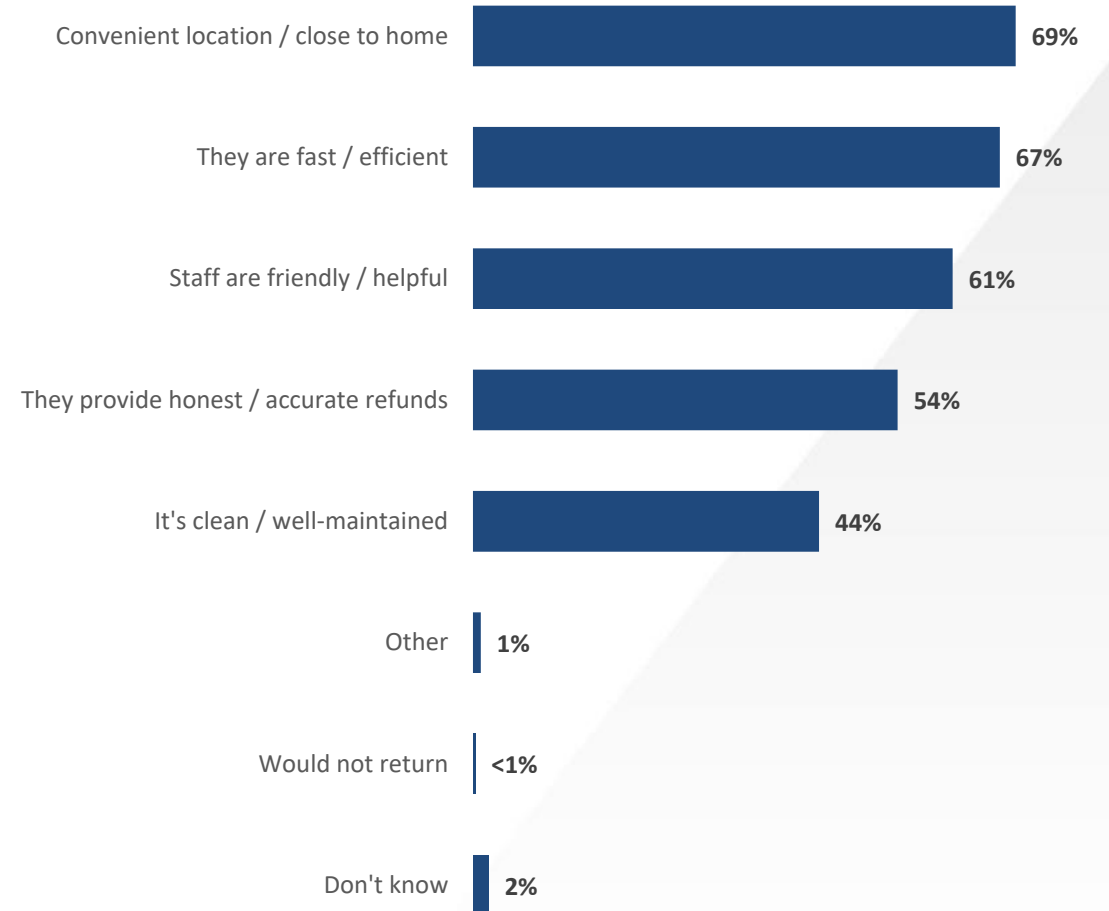
- When asked why customers went to the specific depot they visited, about half claimed it was because it was *close to home*.
- Other common reasons were because the depot is *fast/efficient* or because they *always visit this depot*.



# REASON FOR RETURNING

Q16. What do you like about this particular depot that would make you likely to return?

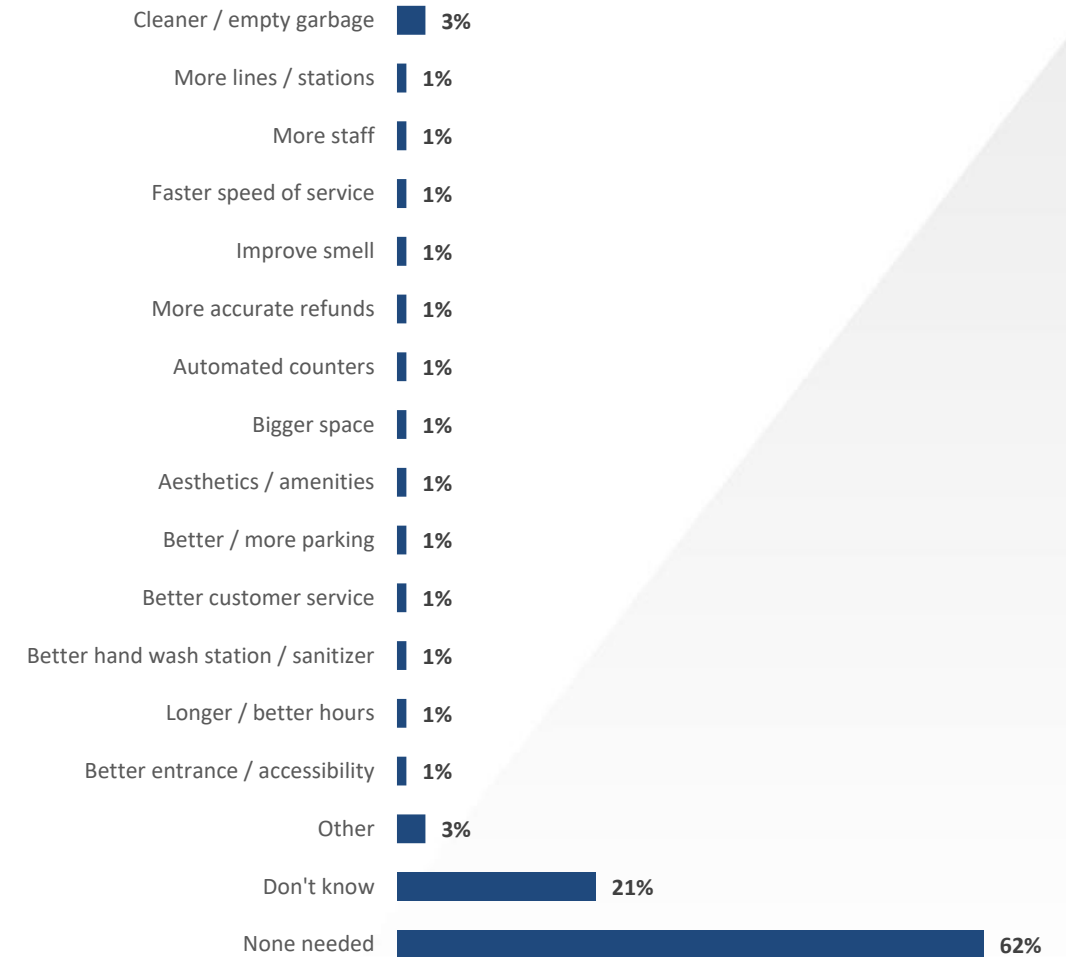
- Respondents most commonly said the *convenient location* and *fast/efficient service* as reasons why they are likely to return to the depot they recently visited.



# SUGGESTIONS FOR IMPROVEMENT

Q17. What, if anything, do you think this depot could do to improve?

- When asked what improvements could be made to their recently visited depot, there was very little consensus among respondents, with the most common suggestion being the depot being *cleaner* (3% of customers).
- Of note, 83% of customers said that no improvements were needed or that they were unable to suggest any.



# OVERALL SATISFACTION

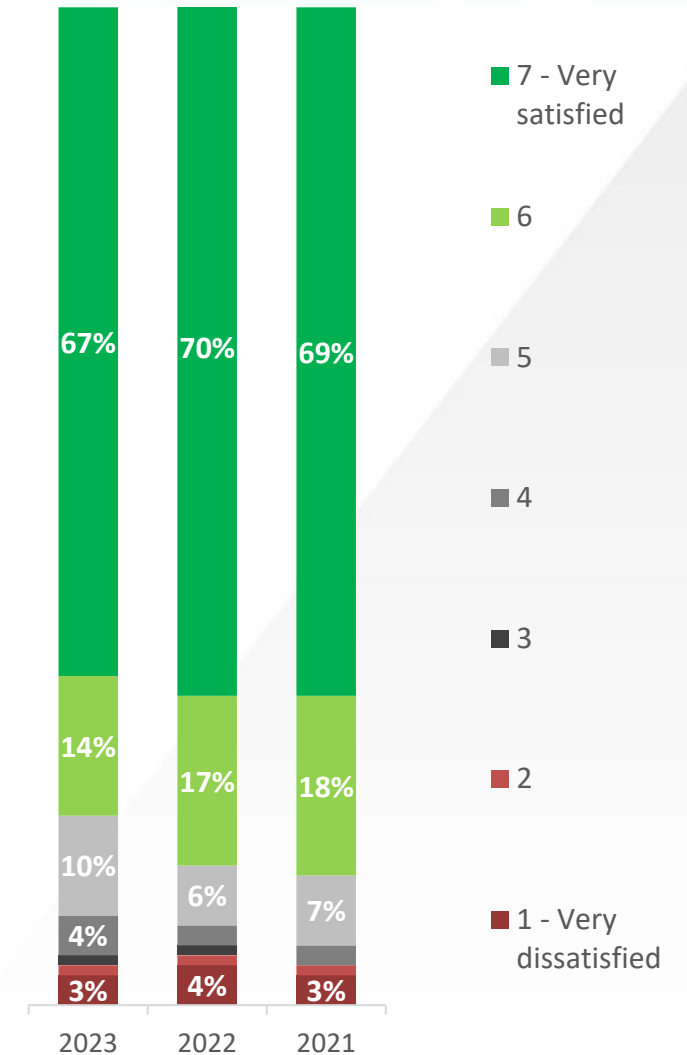
# OVERALL SATISFACTION WITH DEPOT

Q4. Using a scale of 1 to 7, where 1 is very dissatisfied and 7 is very satisfied, how would you rate your overall experience with the depot you recently visited?

- Overall, 82% of depot customers tended to be satisfied with their recent depot visit, with two thirds of customers saying they were very satisfied. These results are overall similar to previous years, although with a slight drop in general satisfaction.
- Satisfaction with time spent at the depot appears to be highly correlated with overall satisfaction, as 91% of those satisfied with their time spent at the depot were also satisfied with their overall visit. In comparison, only 10% of those dissatisfied with their time spent at the depot were still satisfied with their overall visit.

## Demographic insights:

- As age increases, so does satisfaction, as customers 65 and older were most likely to be satisfied with their recent visit.
- Rural depot customers are more likely to say they were satisfied with their visit than urban and metro customers, as were those living in single-family homes compared to those living in other types of dwellings.



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# OTHER DEPOT EXPERIENCES

# ISSUES WITH RETURNS

Q27. Have you ever brought back a container to a depot that the depot worker would not accept?

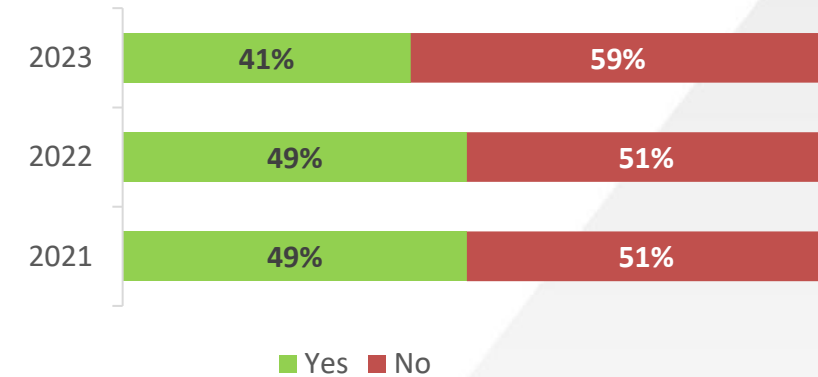
Q29. Did the depot worker explain why they could not accept the container?\*

- 41% of customers claim to have brought back a container to a depot that would not be accepted, which is a drop from 49% the two previous years.
- 76% of those who brought back a container the depot would not accept were given a reason why, which is down from 84% in 2022.

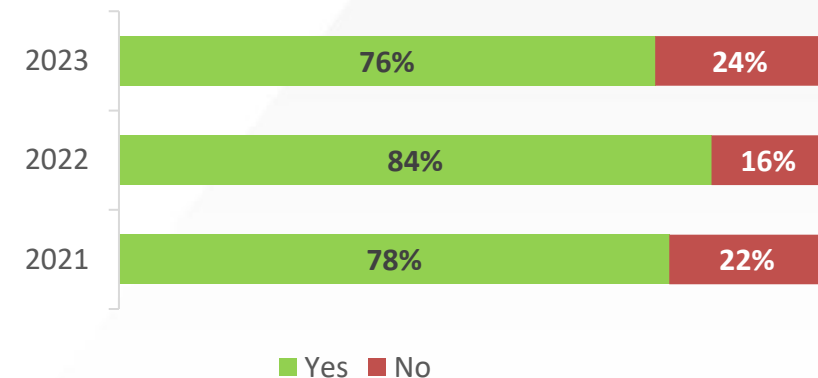
## Demographic insights:

- Generally, as age increases, the likelihood of having experienced being unable to return a beverage container that they brought back increases, although these results are not statistically significant in 2023.
- Similarly, those 65 and older are most likely to say they received an explanation as to why their containers were not accepted, although not quite a statistical difference.

### Unaccepted returns



### Reason given

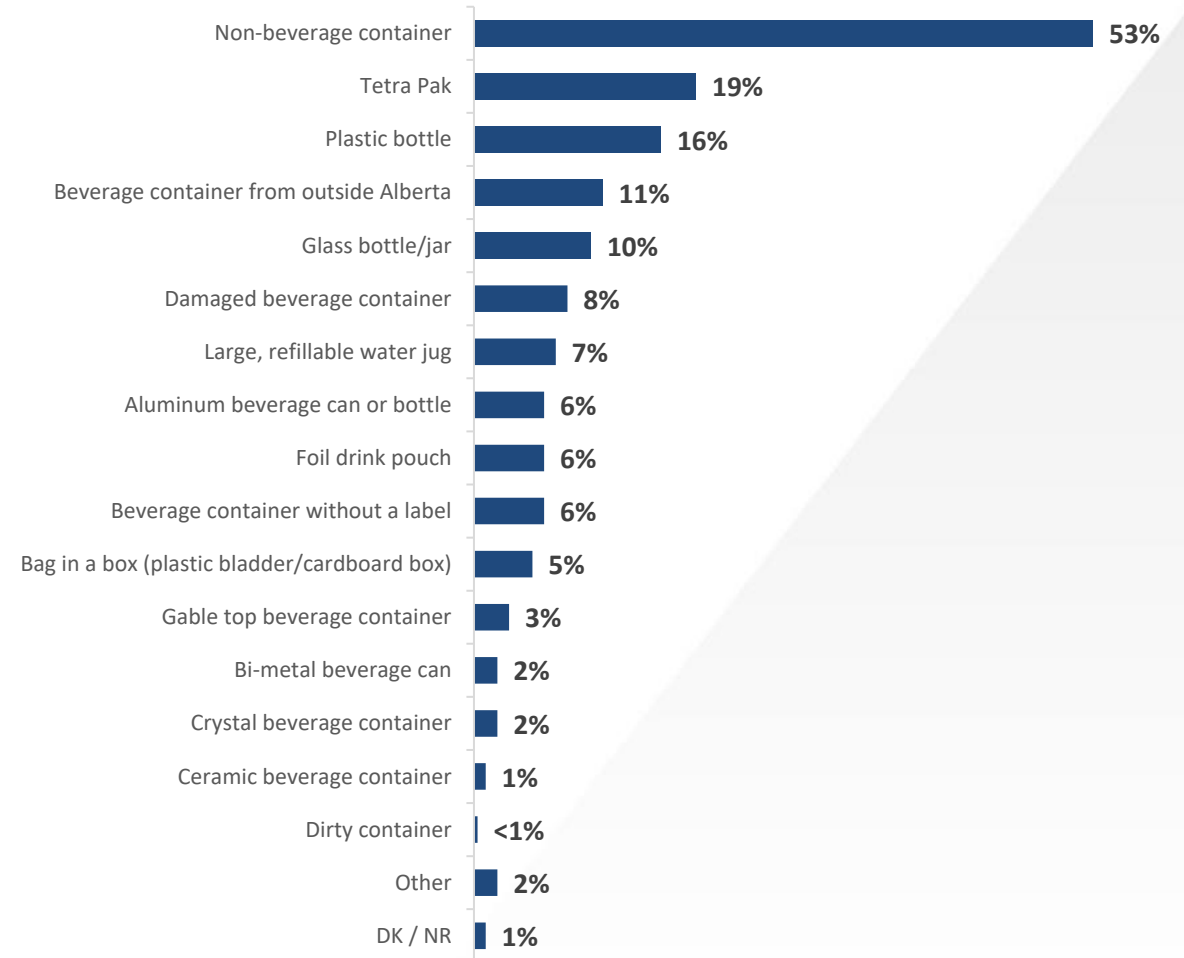




# INELIGIBLE CONTAINERS

Q28. What type of container(s) did the depot not accept?

- The most common type of container that was not accepted by a depot was by far *non-beverage containers, such as containers for detergent, olive oil, soup, etc.*, with just over half of all types of unaccepted containers.



# CONTAINERS WITHOUT LABELS

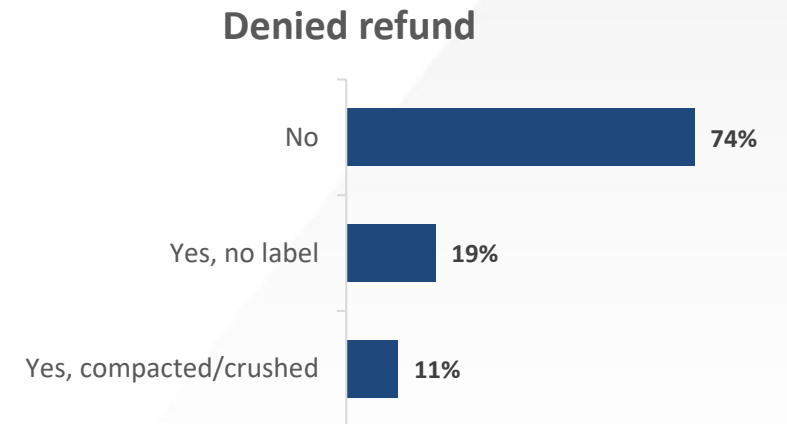
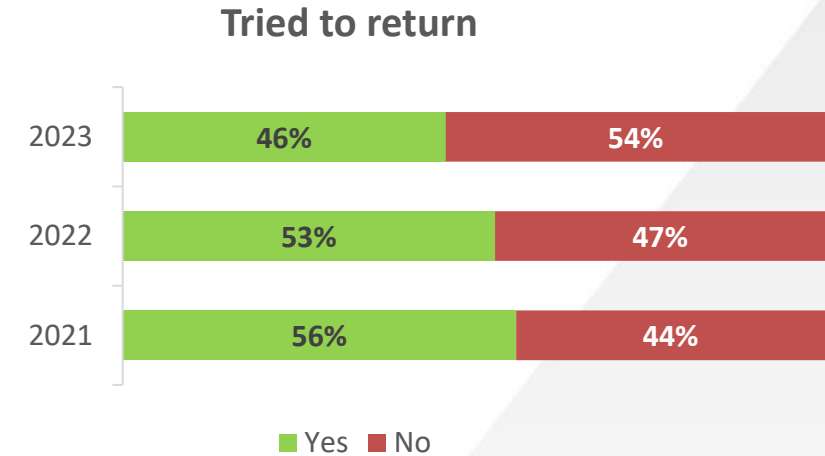
Q36. Have you ever tried to return a beverage container that did not have a label or that was compacted/crushed to a depot?

Q37. Have you ever been denied a refund for a container that did not have a label or that was compacted/crushed?\*

- Less than half of recent depot customers have brought back a container for a refund that either did not have a label or was compacted/crushed.
- About 74% of these respondents say that the container they brought back was accepted for a refund, with 19% saying they were denied a refund for a container without a label and 11% for a crushed/compacted container.

## Demographic insights:

- Those visiting rural area depots were less likely than their counterparts to say that they have been denied a refund for returning either type of container.



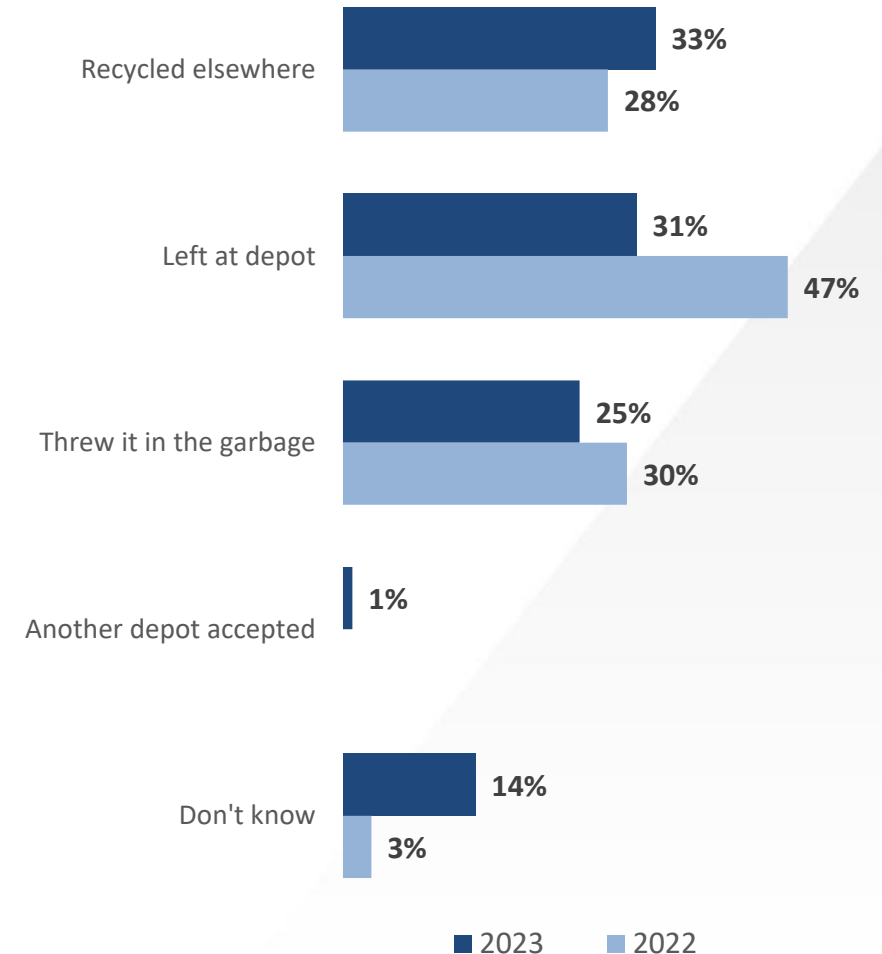
# DISPOSING OF NON-REFUNDED CONTAINERS

Q38. What did you do with the container(s) you were not able to get a refund for?\*

- Of those who did not get a refund for a container they tried to bring back, 33% *recycled it elsewhere*, 31% *left it at the depot*, and 25% *threw it in the garbage*.
- There are some changes in results from the previous year, most notably, the drop in respondents who *left it at the depot*.

## Demographic insights:

- There were no statistical differences by groups.

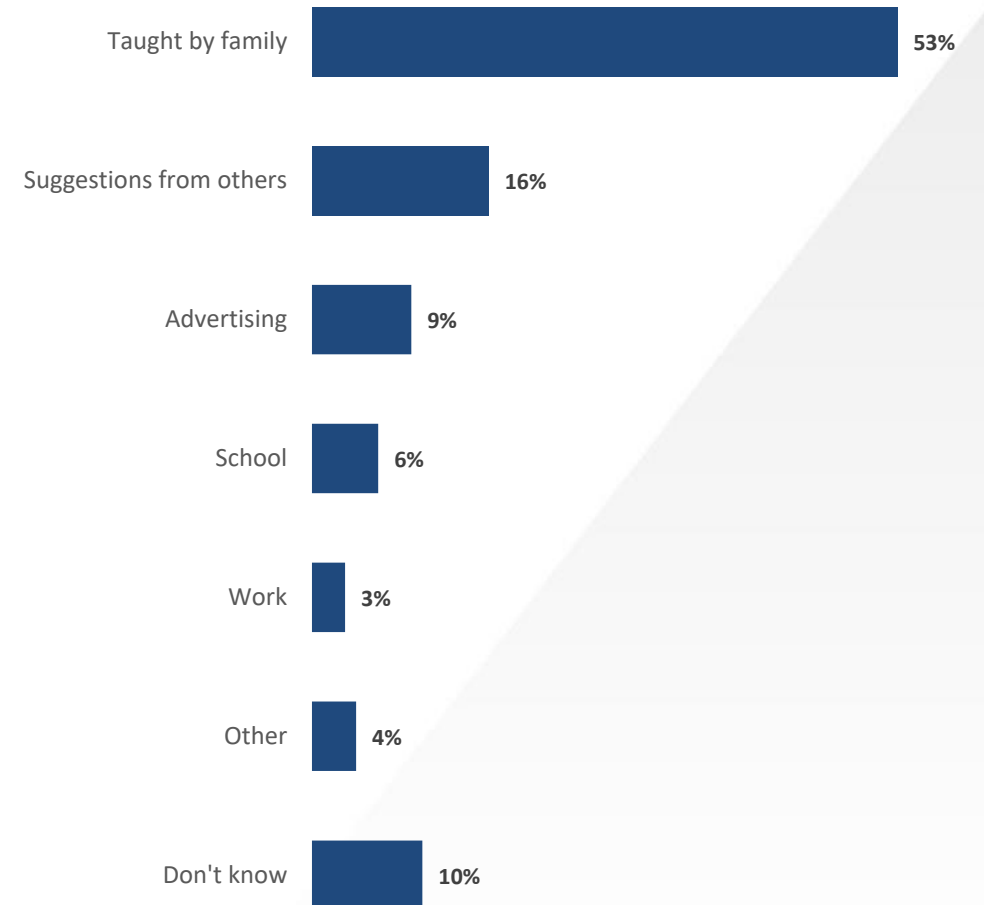


**AWARENESS**

# KNOWLEDGE OF RECYCLING DEPOTS

Q20. How did you first learn to take containers back to a depot?

- When asked how they first learned to take beverage containers back to a depot for a refund, just over half of respondents said they were *taught by their family*, which is the most common response by far.



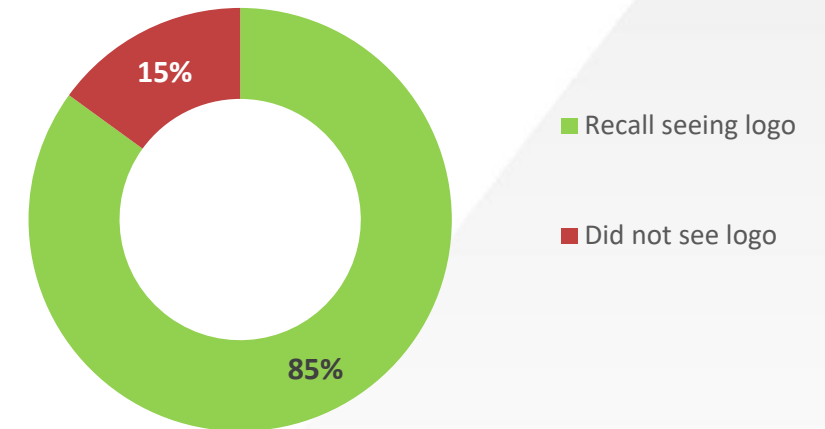
# LOGO AWARENESS

Q21. Do you recall seeing this logo during your recent visit to the depot?

- Overall, 85% of customers who recently visited a recycling depot say that they recall seeing the recycling depot logo.

## Demographic insights:

- Customers 65 and older are less likely than younger customers to recall seeing the depot logo during their recent visit.



# ALBERTA DEPOT REGULATIONS

Q30. Before this survey, did you know that all depots in Alberta are regulated?

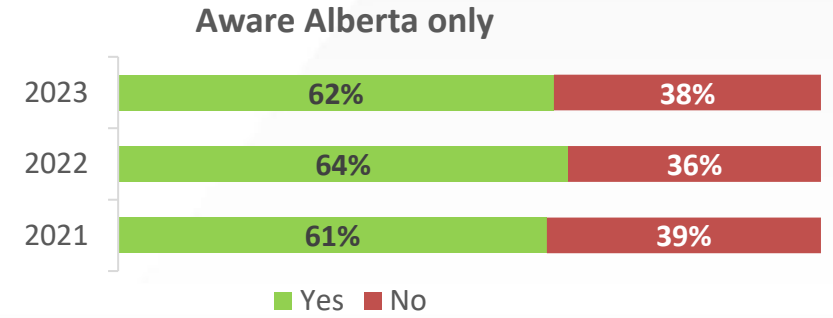
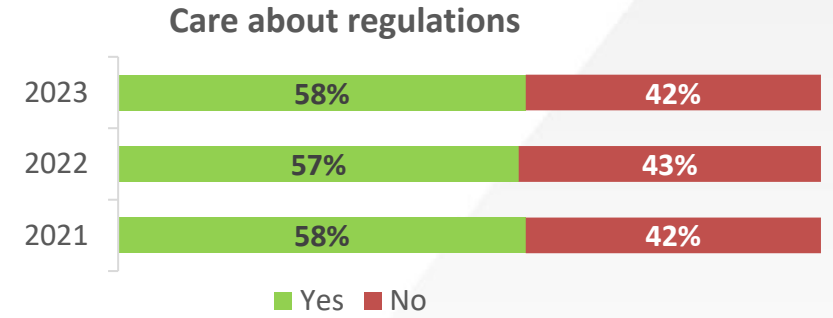
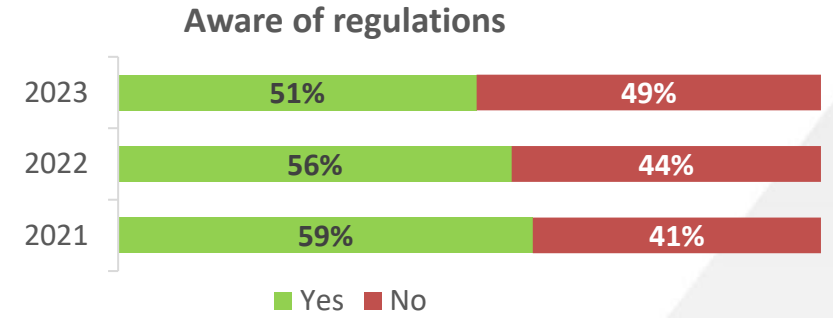
Q31. Does it make a difference to you whether depots are regulated or not?

Q32. And before this survey, were you aware that only beverage containers purchased in Alberta are eligible to be returned to an Alberta depot for a refund?

- About half of recent depot customers claim to be aware that all depots in Alberta are regulated, but a higher proportion of respondents (58%) say that depots being regulated makes a difference to them.
- Nearly two thirds say that they are aware that only containers purchased in the province can be returned for a refund at an Alberta depot.
- Results are similar to previous years, with the exception of a continued drop in awareness of regulations.

## Demographic insights:

- As age increases, depot customers are more likely to say it matters to them whether or not depots are regulated.
- Additionally, those living in single-family houses are more likely than their counterparts to care about depot regulation.



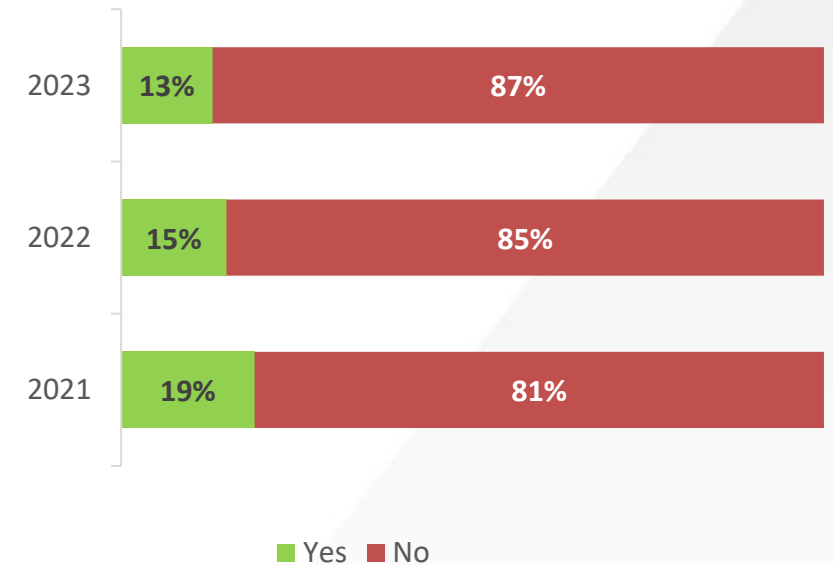
# AWARENESS OF ELIGIBLE CONTAINERS

Q39. Do you find it difficult to differentiate which types of containers are eligible for a refund?

- The majority of respondents say that they do not have difficulties differentiating which types of containers are eligible for a refund. Although results are similar to last year, there has been a slight increase in awareness of refundable containers each of the past two years.

## Demographic insights:

- Those under 30 are more likely than older customers to say they have difficulty differentiating between eligible and not eligible containers.





# CUSTOMER PREFERENCES AND BEHAVIOURS

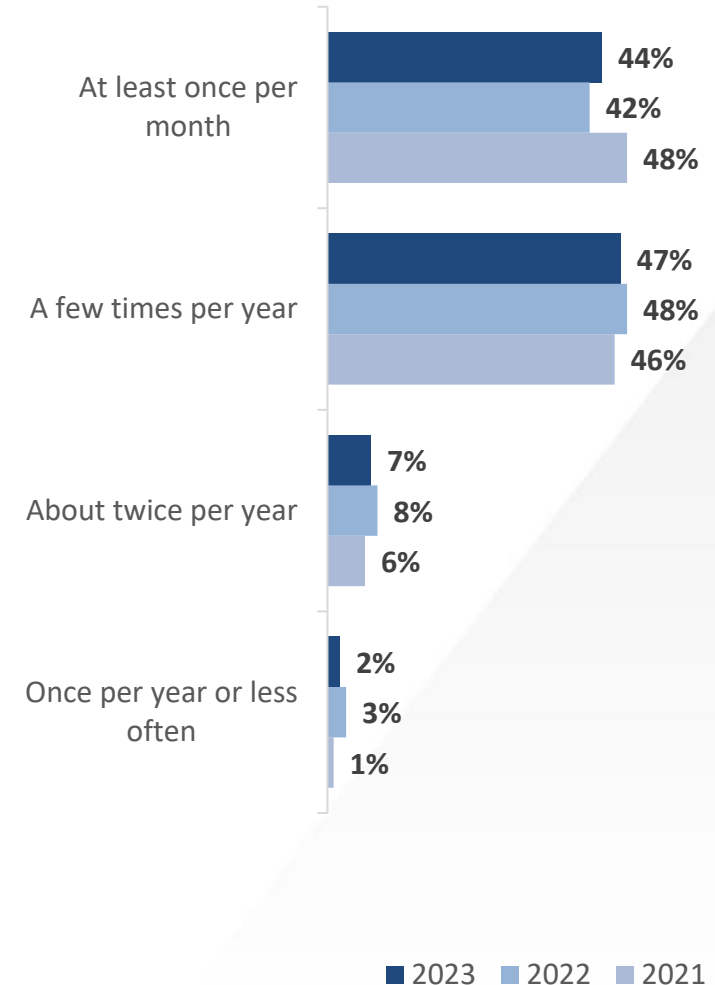
# FREQUENCY OF DEPOT VISITS

Q18. Thinking about a typical year, how often would you say you visit any recycling depot to return beverage containers?

- 44% of respondents say that they visit a recycling depot to return beverage containers *at least once per month*, while 47% say that they visit *a few times per year*.
- These proportions remain very similar to results from the previous year.

## Demographic insights:

- Those in rural areas tend to be most likely to return beverage containers to a depot more often (at least monthly), while those in metro areas are least likely.



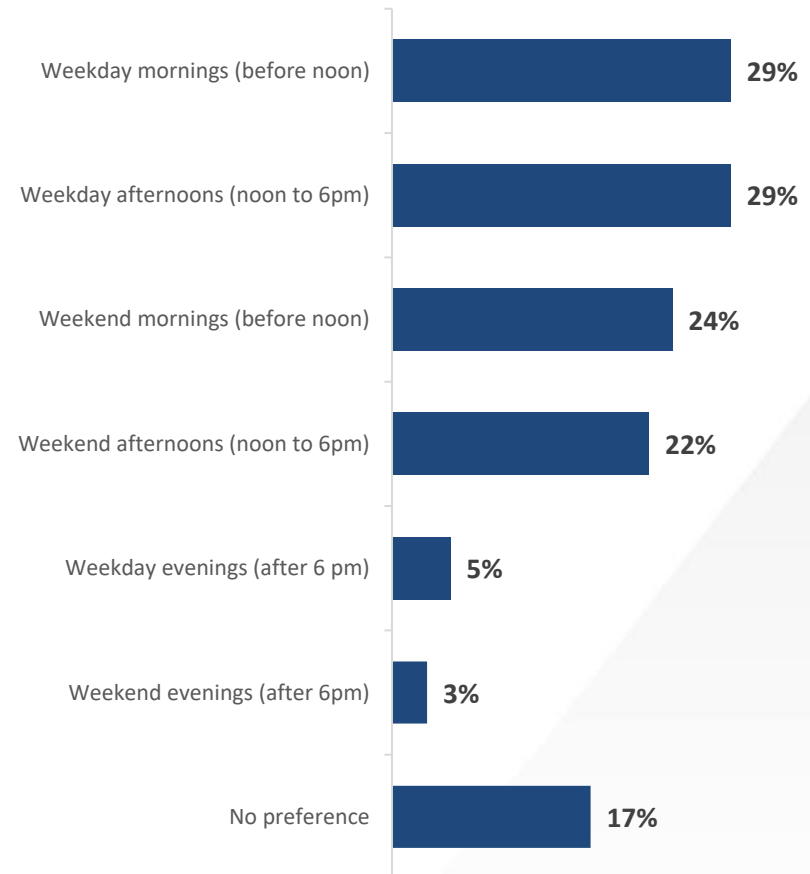
# PREFERRED TIME FOR DEPOT VISITS

Q19. Generally, what are your preferred times to visit a depot?

- The most common times respondents say they prefer visiting a depot is *during the week*, either in the morning or afternoon.
- There is very little preference in visiting in *the evening*, regardless of the day of the week, however, this is likely because many depots are not open during this time.

## Demographic insights:

- When looking at the two most preferred times, those 45 and older, those living in single-family homes, and those in urban or rural areas are more likely than their counterparts to prefer weekday mornings.



# BEVERAGE CONTAINER DROP-OFF/COLLECTION SERVICE

Q22. If a service was offered where you could drop off your containers without waiting in line and receive your money later, would you use this service?

Q23. If a collection service was offered where you could have your containers picked up from your home/work and receive your money later, would you use this service?

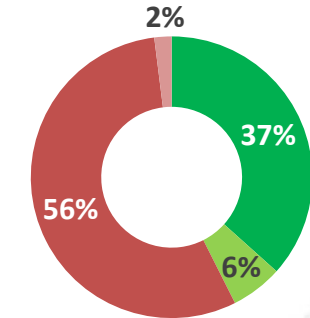
Q24. Was there a fee associated with the service?\*

- Only a small proportion of those who recently visited a recycling depot say that they have used either a beverage container drop-off or collection service rather than returning containers to a depot, however, a total of 43% say they would use a drop-off service (or use again), and 42% would use a collection service (or use again).
- Of those who have used a beverage container collection service, 54% say that there was a fee associated with the collection.

## Demographic insights:

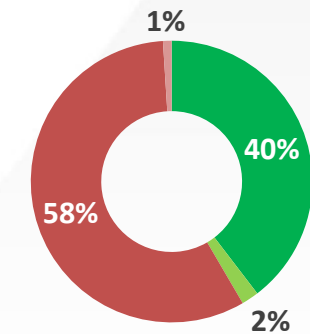
- As age increases, the interest in using either type of service decreases.
- Those in metro areas tend to have a slightly greater interest for a collection service than those in other areas.

### Drop-off service



■ Yes, would use  
■ No, would not use  
■ Already used and would use again  
■ Already used and would not use again

### Collection service



■ Yes, would use  
■ No, would not use  
■ Already used and would use again  
■ Already used and would not use again

# SATISFACTION WITH COLLECTION SERVICE

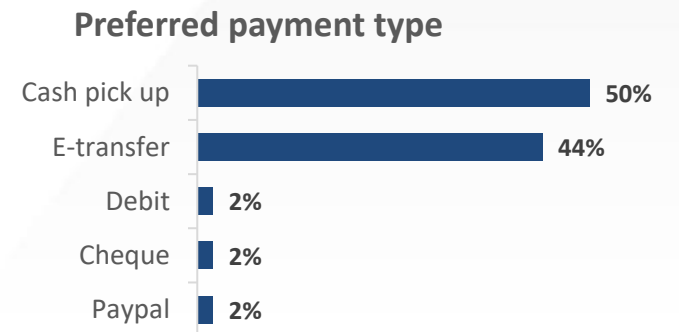
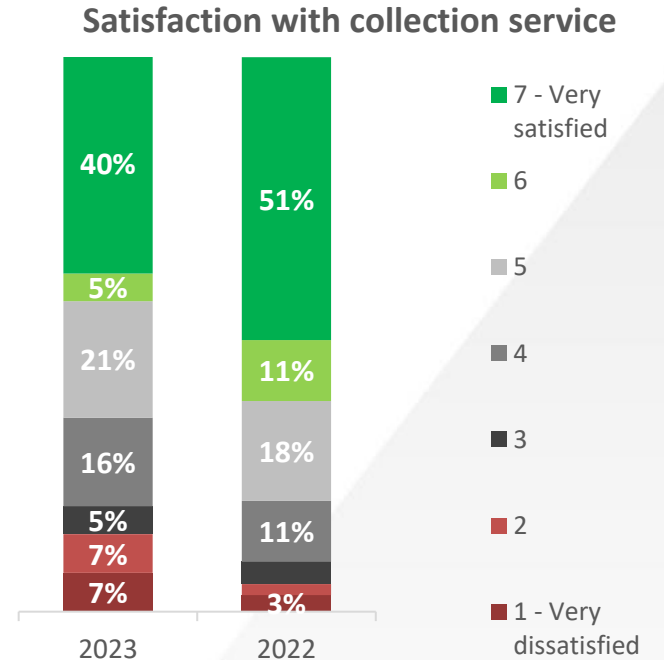
Q25. How satisfied were you with the collection service?\*

Q26. How would you prefer to receive your money later after using a beverage container drop-off or collection service?\*\*\*

- 44% of customers who have used a beverage container collection service were satisfied (rating of 6 or 7 out of 7) with the service, which is down from 62% the previous year.
- Those interested in using either a beverage container drop-off or collection service in the future most commonly say they would prefer to *pick up cash*, followed by *e-transfer*.

## Demographic insights:

- There were no statistical differences by groups.



# WILLINGNESS TO TRAVEL TO DEPOTS

Q33. If you did not have a depot in your local community, or a close neighbouring community, and there were no beverage container collection services available in your area, what would you be most likely to do with your recyclable beverage containers?\*

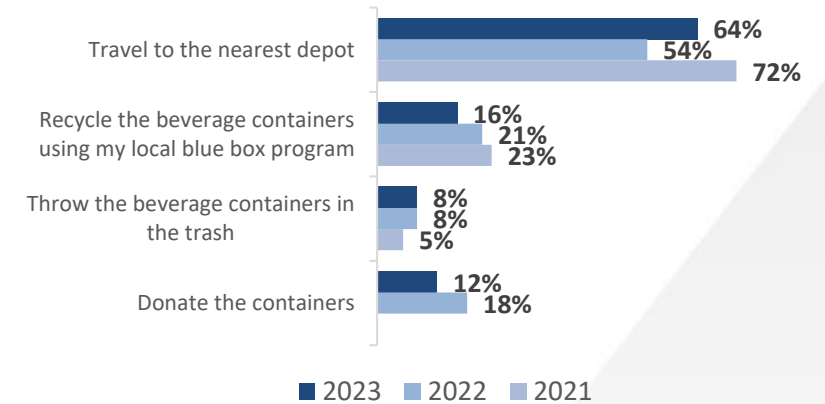
Q34. How far would you be willing to travel to return your beverage containers to a depot?

- Nearly two thirds of respondents say that they would be willing to *travel to the nearest depot* to return beverage containers if there were no recycling depots near them compared to just 8% who would *throw them in the trash*.
- About three quarters of respondents would be willing to travel up to 20 km to a depot, while the remaining quarter say that they would be willing to travel further.

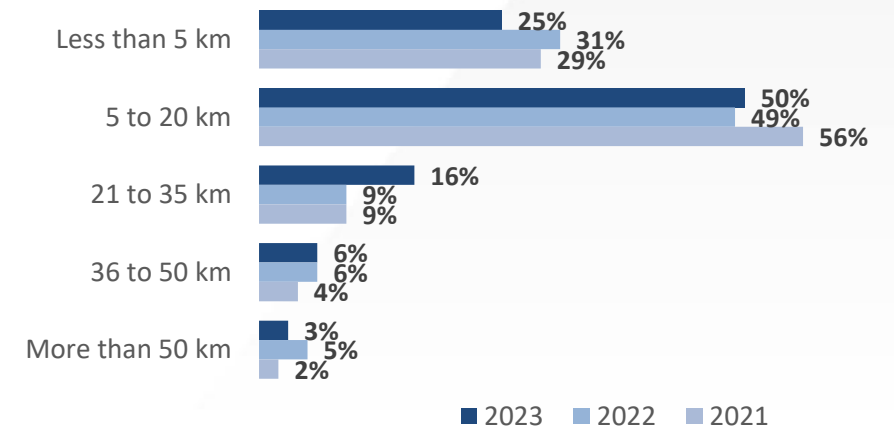
## Demographic insights:

- Those in rural areas are more likely to say they would travel to the nearest depot to return containers, and are generally more willing to travel further distances to do so.

Disposal of containers



Distance willing to travel



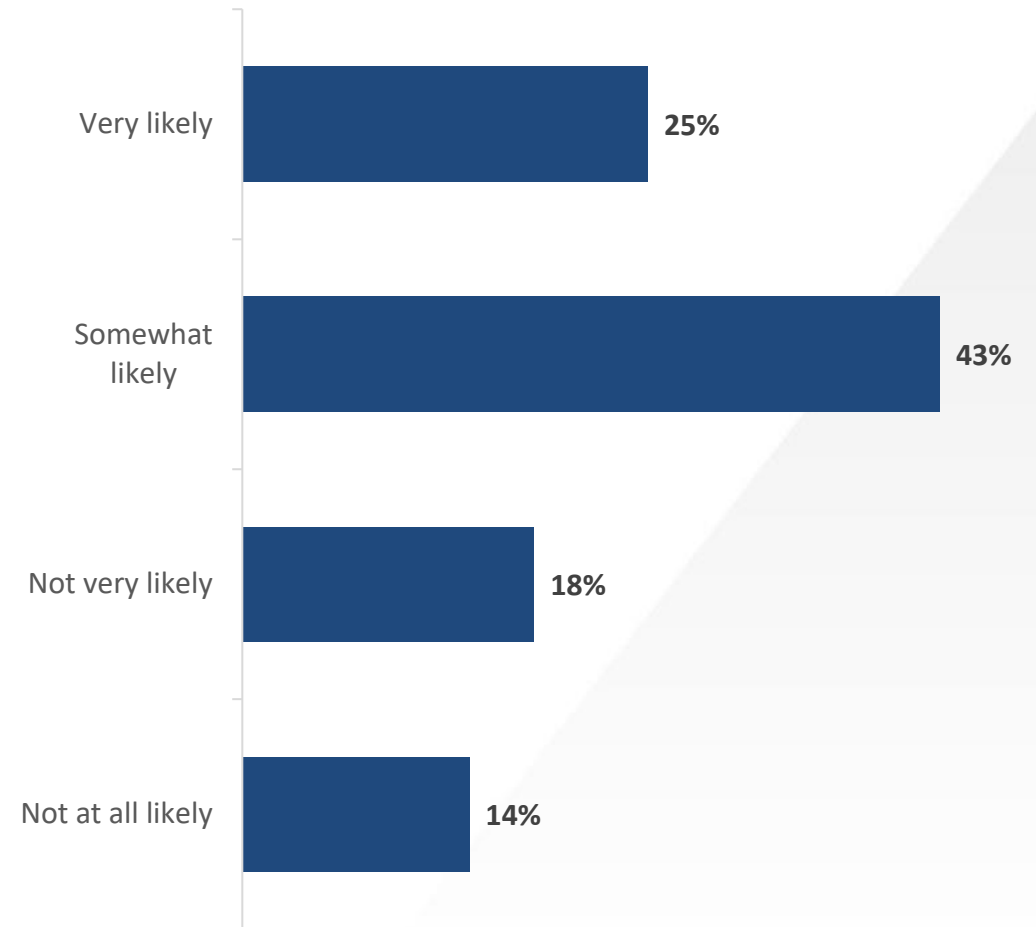
# LIKELIHOOD OF USING AUTOMATED COLLECTION STATION

Q35. Similarly, if you did not have access to a bottle depot near you, how willing would you be to use an unmanned automated collection station to return your beverage containers? This would be like a reverse vending machine.

- Overall, respondents appear to be in favour of using automated collection stations to return beverage containers if there were no depot in their area, as over two thirds say they would be likely to use this, including one quarter who say they would be very likely.

## Demographic insights:

- Customers 65 and older and those living in rural areas are least likely to say they would use an unmanned automated collection station to return beverage containers.



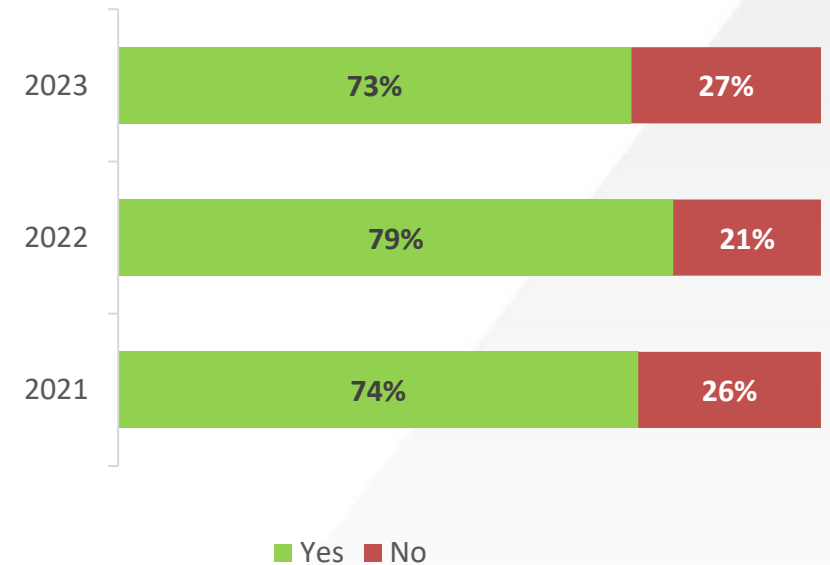
# PREFERENCE FOR EXPANDED ELIGIBILITY

Q40. Would you like to see a deposit placed on more types of containers so that you can bring them back to a depot to be recycled?

- 73% of recent depot customers are in favour of placing a deposit on more types of containers so that they can be recycled at a depot, which is down from 79% the previous year, but similar to the 74% in 2021.

## Demographic insights:

- Depot customers 65 and older are more likely than younger customers to prefer expanded eligibility on refundable containers, while those in metro areas are less likely than those in urban or rural areas.





# DEPOT MODERNIZATION

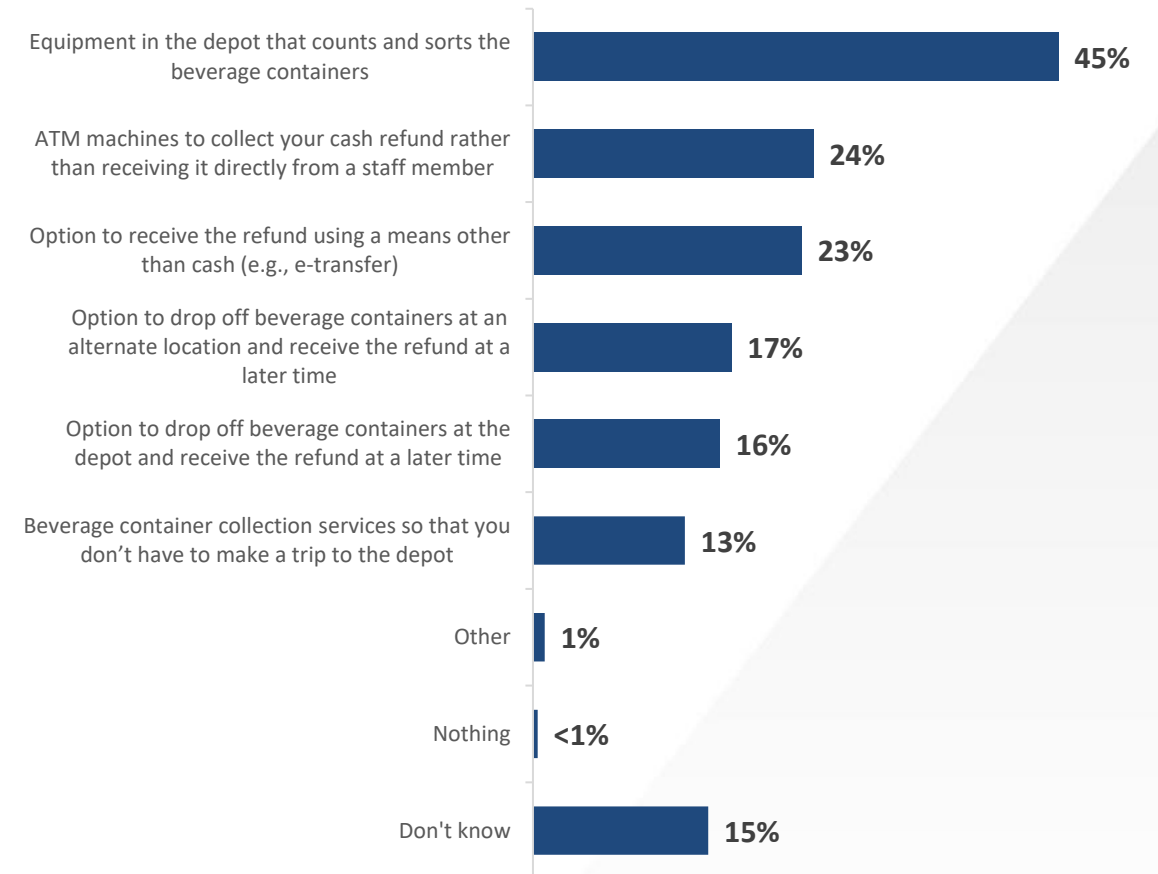
# MEANING OF DEPOT MODERNIZATION

Q43. What does the term 'modernization' mean to you when thinking about the Alberta depot industry?

- When asked what 'modernization' in the depot industry means to them, respondents most often respond with *equipment that counts and sorts beverage containers*.
- This is followed by *ATM machines to collect cash refunds instead of directly from a depot employee and option to receive refunds by means other than cash*.

## Demographic insights:

- Customers 65 and older were least likely to provide any response, which may indicate they are more likely to be unsure of what modernization in the industry would look like.



# BOTTLE DEPOT MODERNIZATION IN ALBERTA

Q41. Based on your experience with Alberta bottle depots, please rate where you believe the depot industry is in terms of modernization.

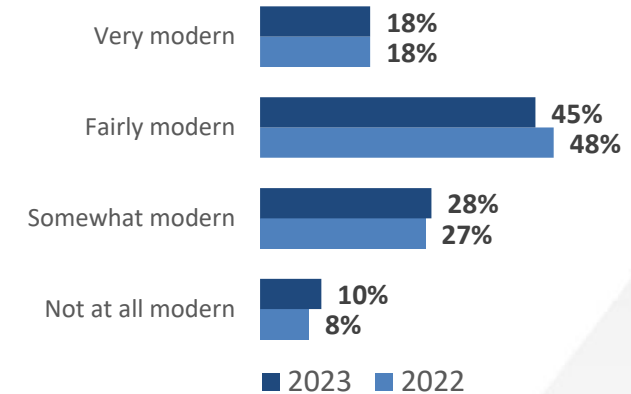
Q42. As compared other industries that you've experienced (such as banking, grocery/meal and parcel deliveries, etc.), please rate how you believe the depot industry compares in terms of modernization.

- In terms of how modern depot customers believe the Alberta depot industry to be, nearly half say it is *fairly modern*, while over one third say it is *somewhat* or *not at all modern*.
- Although 18% feel the Alberta depot industry is *very modern*, only 8% say they believe it to be *more modern* than other industries, but respondents most commonly feel the Alberta depot industry is *as modern* as other industries.
- These results have changed only slightly overall compared to the previous year.

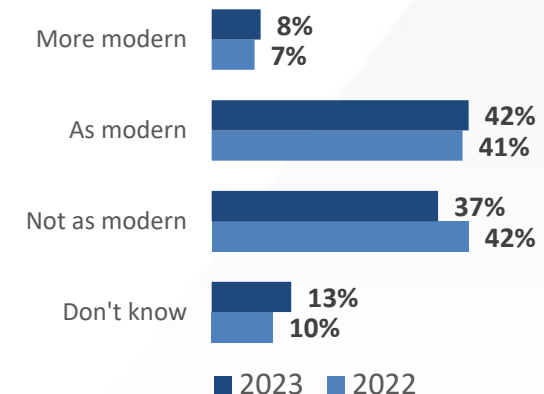
## Demographic insights:

- As age increases, the belief that the depot industry is *more modern* than other industries decreases. Those in rural areas are also less likely than those in other areas to say the same.

### Alberta depot industry



### Comparison to other industries

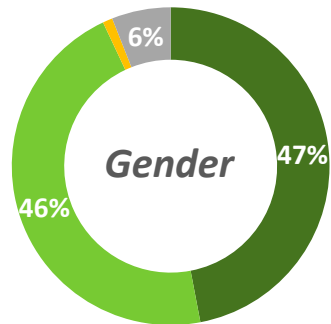


# APPENDIX A



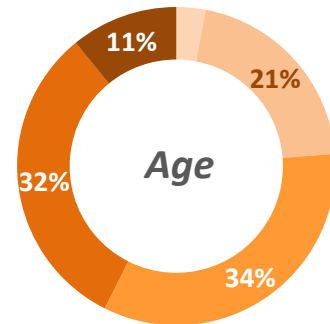
# DEMOGRAPHIC PROFILE OF CUSTOMERS

47% Male



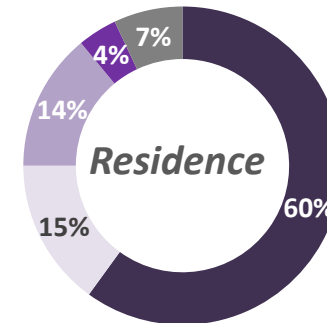
- Male
- Female
- Other
- No response

34% 30 to 44



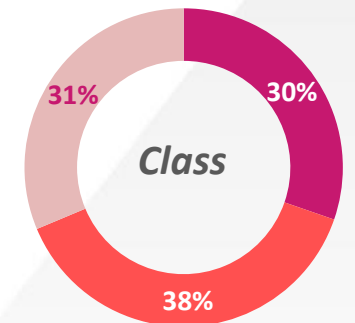
- 13 to 17
- 18 to 29
- 30 to 44
- 45 to 64
- 65 and older

60% Single-family home



- Single-family detached house
- Multi-family home
- Apartment or condo
- Other
- No response

38% Metro



- Urban
- Metro
- Rural

# 2023 DEPOT PARTICIPATION

Classification	Depot	Municipality	Completed surveys	Classification	Depot	Municipality	Completed surveys
Rural	All Seasons Bottle Depot	Wabamun	19	Metro	Millwoods Bottle Depot	Edmonton	60
Rural	Ardrossan Bottle Depot	Ardrossan	50	Rural	Morinville Bottle Depot	Morinville	60
Metro	Bottle Bin Bottle Depot	Edmonton	60	Metro	North Refund Centre	Edmonton	60
Metro	Callingwood Bottle Depot	Edmonton	54	Rural	Onoway Bottle Depot	Onoway	60
Rural	Calmar Bottle Depot	Calmar	60	Metro	Quick Stop Bottle Depot	Edmonton	60
Urban	Campbell Park Bottle Depot	St. Albert	60	Rural	Redwater Bottle Depot	Red Water	25
Metro	Capilano Bottle Depot	Edmonton	60	Urban	Sherwood Park Bottle Depot	Sherwood Park	60
Metro	Castledowns ABC Bottle Depot	Edmonton	25	Urban	St. Albert Bottle Refund Centre	St. Albert	60
Urban	Cold Lake Bottle Depot	Cold Lake	60	Urban	Stony Plain Bottle Depot	Stony Plain	60
Urban	Fir Street Bottle Depot	Sherwood Park	16	Metro	Summerside Bottle Depot	Edmonton	60
Urban	Lacombe Bottle Depot	Lacombe	37	Rural	Tofield Bottle Depot	Tofield	60
Rural	Lamont Bottle Depot	Lamont	28	Urban	Universal Bottle Depot	Camrose	17
Urban	Leduc Bottle Depot	Leduc	60	Rural	Westlock Bottle Depot	Westlock	53
Metro	Manning Bottle Depot	Edmonton	60	Urban	Wetaskiwin Bottle Depot	Wetaskiwin	10
Rural	Mayerthorpe Bottle Depot	Mayerthorpe	42	Metro	Winterburn Bottle Depot	Edmonton	60