



Ipsos Reid



BEVERAGE CONTAINER MANAGEMENT BOARD

Beverage Container Recycling – A Survey of Albertans

Final Report

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TABLE OF CONTENTS

SUMMARY OF KEY FINDINGS	1
BACKGROUND AND METHODOLOGY	5
BACKGROUND AND OBJECTIVES.....	5
METHODOLOGY	5
RESULTS REPORTING	6
GENERAL ATTITUDES	7
PERSONAL PERFORMANCE.....	7
PERCEIVED IMPACT OF ENVIRONMENTAL BEHAVIOURS	8
BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS	9
PAST SIX MONTHS PURCHASE OF BEVERAGE CONTAINERS.....	9
AWARENESS OF REFUNDABLE BEVERAGE CONTAINERS.....	10
INCIDENCE OF BEVERAGE CONTAINER RECYCLING AND REDEMPTION	13
FREQUENCY OF RECYCLING OR RETURNING MILK CONTAINERS FOR A REFUND.....	16
AWARENESS OF REFUNDABLE DEPOSIT FOR BEVERAGE CONTAINERS	18
RECALL OF INFORMATION ABOUT REFUNDABLE DEPOSITS.....	19
MEANS OF INCREASING PUBLIC AWARENESS ABOUT REFUNDABLE BEVERAGE CONTAINERS.....	20
BOTTLE DEPOTS	21
FREQUENCY OF VISITATION.....	21
TRAVEL TIME TO BOTTLE DEPOTS	21
REASONS FOR NOT RETURNING BEVERAGE CONTAINERS TO DEPOTS OR NOT RETURNING MORE OFTEN.....	22
IMPORTANCE OF BOTTLE DEPOT ATTRIBUTES.....	23
SATISFACTION WITH BOTTLE DEPOT ATTRIBUTES	24
ACTION GRID ANALYSIS	25
THE OVERALL RETURN RATE	27
OPPORTUNITIES FOR INCREASING THE OVERALL RETURN RATE FOR BEVERAGE CONTAINERS	27
AWARENESS OF THE OVERALL RETURN RATE FOR BEVERAGE CONTAINERS.....	28
RESPONDENT CHARACTERISTICS	29
APPENDIX A: SURVEY QUESTIONNAIRE	

SUMMARY OF KEY FINDINGS

Ipsos Reid conducted a total of 1,206 online interviews with a representative sample of Albertans aged 18 and older, and 100 interviews with Alberta teens aged 15 to 17 years. Data were weighted to ensure the overall sample's regional and age/gender composition reflects that of the actual Alberta population according to 2006 Canadian Census data.

The overall purpose of the research was to gain an understanding of how the average Albertan household conducts their recycling of beverage containers and their opinion on the process. Specific research objectives included assessing: knowledge regarding what can be returned for a refund; current recycling or redemption of beverage containers; satisfaction and importance of various aspects of bottle depots; and, possible ways to increase Albertan's recycling.

What follows is a summary of key research findings.

Awareness of What can be Returned for a Refund

Awareness that most types of soft drink, juice, water and alcoholic beverage containers can be returned for a refund is above the 85% mark. The exceptions being foil juice pouches (54%), juice cans (52%) and bag-in-a-box wine or juice (42%). One should note that these are also among the least purchased beverage containers.

Eighteen months after introducing a deposit fee for dairy containers, awareness that plastic milk jugs can be returned for a refund tops the 90% mark, while awareness that milk cartons are refundable is high (83%) though comparatively lower. However, only two-thirds of Albertans are aware that liquid cream cartons, 'milk to go' containers or milk tetra paks can be returned for a refund, while less than half are aware of the refundable deposit on yogurt drinks and liquid meal replacements.

2010 sees a **significant 8 percentage point increase** in awareness that plastic milk jugs can be returned for a refund (from 84% in 2009 to 92% in 2010), while awareness regarding milk cartons has remained flat.

Recycling and Redemption of Beverage Containers

Reported recycling of beverage containers in the past six months is near universal (97%), while redemption is 91%.

Among Albertans who have purchased each type of beverage container, reported incidence of recycling (via any means) is 85% or higher for all categories with the exception of liquid meal replacements (80%). In fact, the incidence of recycling plastic bottles or jugs (juice, soft drink or water), aluminum or metal cans (juice, soft drink or water), glass bottles (juice, soft drink or water), wine or liquor bottles and beer bottles or cans and milk jugs is 95% to 97%.

With regards to returning containers for a refund, dairy containers tend to lag. Container types that less than eight-in-ten purchasers report returning to a bottle depot are bag-in-a box wine or juice (73%), milk cartons (76%), milk tetra paks (71%), liquid cream cartons (69%), 'milk to go' containers (69%), yogurt drinks (59%) and liquid meal replacements (56%).

Frequency of Recycling or Redeeming Milk Containers

Almost three-quarters (73%) of Albertans say they *always* recycle or return milk and cream containers, while just 3% say they never do. It is notable that 79% of households with curbside recycling say they *always* recycle or return milk and cream containers versus 65% of households that do not have curbside recycling.

The most frequent reasons given for not *always* recycling or returning milk and cream containers are lack of awareness (18%), simply forgetting (17%), inconvenience (12%) and recycling options not always being available (11%).

Awareness of the Refundable Deposit for Beverage Containers

Half (52%) of Albertans are aware of the refundable deposit for beverage containers that are one litre or less, while four-in-ten (38%) are aware of the deposit for beverage containers more than one litre in size. Among those unable to cite the refundable deposit value, just under half say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while about half say it would make no difference.

Four-in-ten (39%) Albertans say they have seen information at retail stores that identifies the refundable deposit on beverage containers. One quarter (26%) at grocery stores, 13% at a liquor store, 8% at a convenience store and 6% at a gas station. Cash register receipts (59%) are by far the most common channel, followed by the shelf where the product is placed (32%).

While Albertans think **putting the refundable deposit value on the container itself (77% very effective)** or on the shelf where the product is placed (46% very effective) would both be effective means of increasing awareness, the former would clearly be the more effective measure.

Bottle Depots

Specific aspects of bottle depots (e.g. location, service, waiting time) are not major barriers to use. Among the minority of Albertans who have not returned beverage containers to a depot in the past six months, many indicate they recycle the containers instead – 26% 'donate to charity', 13% 'leave them for bottle collectors', 7% 'put into blue box' and 'use the building recycling program' (1%). Other reasons given include 'too much trouble' (26%), no room to store them (11%) and 'too time consuming' (11%). Issues with bottle depots themselves are limited – 9% 'depot is too far away', 4% 'bottle depot is dirty or smelly' and 3% 'line up or waiting time'. The predominant reason for visiting a bottle depot a couple of times a year or less is simply 'wait

until we have a large load or until it's worthwhile' (63%).

For Albertans who have visited a depot in the past six months, the **most important factor influencing their decision whether or not to return containers to a depot is getting the refundable deposit back (81% very important** – i.e. rating of 6 or 7 on a 7-point scale), **followed by convenience of the location (61% very important)**. In the next tier are waiting time (50% very important), customer service (48% very important) and safety of the depot location (45%), while **cleanliness (33% very important) and overall appearance (25% very important) of the depot are the least important factors**.

Satisfaction with most aspects of bottle depots is very high. More than half of Albertans are very satisfied (rating of 6 or 7 on a 7-point scale) with getting the refundable deposit back (80%), convenience of the location (62%), safety of the depot location (58%), waiting time (54%) and customer service (53%). Comparatively lower is satisfaction with the overall appearance (36% very satisfied) and cleanliness (32% very satisfied) of the depot. Apart from getting the deposit back and location, satisfaction with depots tends to be lower in Edmonton and Calgary.

Opportunities for Increasing the Overall Return Rate

When asked what the BCMB could do to increase the overall return rate of beverage containers, the most frequent suggestions are **educating the public on a number of dimensions (29%), increasing the refundable deposit (18%) and improving various aspects of bottle depots (17%), primarily more locations or more convenient locations (9%)**.

Alberta Youth

Research findings suggest that it is youth aged 18 to 24 years who are disengaged rather than teens aged 15 to 17. There are no notable differences in terms of attitudes or behaviours regarding beverage container recycling between Alberta teens and adults.

- Significantly fewer youth aged 18 to 24 think recycling empty beverage containers has a significant benefit to the environment (66%) compared to adults aged 35 to 54 (77%) and 55 or older (79%).
- Reported incidence of *always* recycling or returning milk and cream containers is significantly higher among Albertans aged 55 or older (80%) and 35 to 54 (76%) compared to younger residents aged 25 to 34 (65%) and 18 to 24 (53%).
- The percentage of youth aged 18 to 24 who think putting the refundable deposit value on the container itself would be very effective (65%) is significantly lower compared to Albertans aged 35 to 54 (80%) and 55 or older (77%).
- Satisfaction with all aspects of bottle depots (considering very satisfied ratings) is lowest among youth aged 18 to 24 and significantly lower than their counterparts aged 25 or older for getting the deposit back (59%), waiting time (34%), safety (40%), customer service (27%) and cleanliness (13%).

Newcomers to the Province

Past five years newcomers to Alberta lag with regard to awareness of what beverage containers can be returned for a refund as well as recycling and redemption.

- Awareness if beverage containers can be returned for a deposit is lowest among past five years newcomers to Alberta – this holds for the majority of container types.
- Though still very high, incidence of recycling beverage containers is significantly lower among past 5 years newcomers to Alberta (92%) compared to longer term residents (97%), while incidence of returning containers to a bottle depot is only 80% among past 5 years newcomers versus 92% among longer term residents.
- The percentage of past five years newcomers who say knowing the deposit value would make them more likely to return containers for a refund is significantly higher than longer term residents at 69% (vs. 45%) for containers one litre or less and 65% (vs. 49%) for containers more than one litre in size.

Recommendations for Moving Forward

The research suggests the following measures could help the BCMB increase the overall rate of return of beverage containers:

- Continue to increase awareness of the refundable deposit on dairy containers, focusing on educating Albertans about the wider array of containers included in the milk deposit program.
- For containers that have a lower overall rate of return, consider providing information on the refundable deposit – as well as the fact that they can be recycled – at the point of purchase, and if possible, on the containers themselves.
- In order to facilitate awareness among newcomers to Alberta, provide information about bottle depots and refundable deposits through channels that new residents typically access (e.g. vehicle registration and licensing, health care).

BACKGROUND AND METHODOLOGY

Background and Objectives

The Beverage Container Management Board (BCMB) is a Designated Administrative Organization (DAO) and is regulated by the Alberta Ministry of Environment. The BCMB's mandate is to sustain a minimum 85% return rate for all regulated beverage containers – that is, plastic drink bottles; plastic jugs, poly cups and bottles; aluminum cans; other metal cans; polycoat containers; bag-in-a-box and juice pouches; glass bottles; and, milk and liquid cream containers. Additionally, the BCMB is charged with maintaining a leading beverage container management system that is innovative, accessible and cost effective.

The overall return rate for beverage containers rose to 82% in 2009 from 77% in 2008. In order to meet the BCMB's goal of "increasing container recycling return rates," it is important to understand Albertans' attitudes, awareness and engagement related to beverage container recycling within the province.

Thus, the BCMB wished to conduct a survey with Albertans in order to gain knowledge of their actions regarding recycling of beverage containers. That is, how the average Albertan household conducts their recycling of beverage containers and their opinion on the process. Key research objectives were to assess:

- Knowledge regarding what can be returned for a refund;
- Current recycling or redemption of beverage containers;
- Satisfaction and importance of various aspects of bottle depots; and,
- Possible ways to increase Albertan's recycling.

Methodology

Between November 18th and December 3rd, 2010, Ipsos Reid conducted a total of 1,206 online interviews with a representative sample of Albertans aged 18 and older, and 100 interviews with Alberta teens aged 15 to 17 years. This included a pilot test with approximately 100 respondents after which minor changes were made to the questionnaire. The median interview length was 13 minutes.

Interviews were stratified by region – i.e. the City of Edmonton, the City of Calgary, Smaller Cities North, Smaller Cities South, Rural North and Rural South. Quotas were established to ensure a reliable sample size within each region for regional analysis. The adult data were weighted to ensure the overall sample's regional and age/gender composition reflects that of the actual Alberta population aged 18 years or older according to 2006 Canadian Census data. The teen data were weighted to ensure the overall sample's composition reflects that of the actual Alberta population aged 15 to 17 years.

With a sample of 1,206, results are considered accurate to within ± 2.9 percentage points, 19 times out of 20, of what they would have been had the entire population of Albertans 18+ years been polled. The margin of error is larger within regions and for other sub-groupings of the survey population. Results for the sample of 100 teens are considered accurate to within ± 9.8 percentage points, 19 times out of 20.

The following table details the number of interviews conducted within each region as well as the corresponding margins of error for the sample of 1,206 adults.

Region	Population 18+ (2006 Census)	% of AB Population 18+	Number of interviews (n)	% of interviews	Maximum margin of error
City of Edmonton	580,890	23.1%	299	24.8%	$\pm 5.7\%$
City of Calgary	793,490	31.6%	328	27.2%	$\pm 5.5\%$
Smaller Cities North ¹	302,355	12.0%	150	12.4%	$\pm 8.0\%$
Smaller Cities South ²	288,280	11.5%	140	11.6%	$\pm 8.3\%$
Rural North	296,620	11.8%	139	11.5%	$\pm 8.3\%$
Rural South	253,325	10.1%	150	12.4%	$\pm 8.0\%$
TOTAL	2,514,960	100%	1,206	100%	$\pm 2.9\%$

¹Smaller Cities North: Camrose, Cold Lake, Fort McMurray, Fort Saskatchewan, Grande Prairie, Leduc, Lloydminster, Sherwood Park, Spruce Grove, St. Albert, Stony Plain and Wetaskiwin
²Smaller Cities South: Airdrie, Brooks, Canmore, Cochrane, High River, Lacombe, Lethbridge, Medicine Hat, Okotoks, Red Deer, Strathmore and Sylvan Lake

Among those who accessed the online survey, 70% completed the survey, 8% dropped out part way through, 5% were screened and 17% were disqualified due to a quota being full.

Results Reporting

In order to be consistent with past surveys, results are presented for the overall weighted sample of **adult Albertans**. Significant differences – both between teens and adults and by socio-demographic variables (e.g. region, gender and age) – are highlighted throughout the report.

GENERAL ATTITUDES

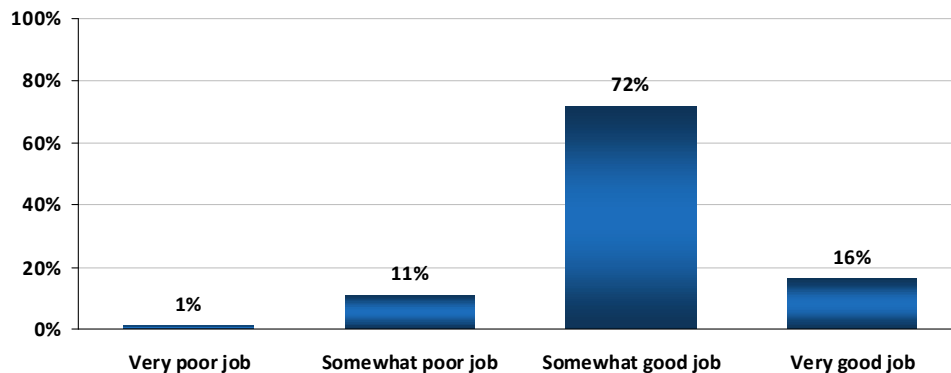
Personal Performance

The vast majority of Albertans feel they are doing a good job when it comes to protecting the environment, but recognize they could be doing more.

Overall, 88% of Albertans rate their own personal performance when it comes to protecting the environment as very good or somewhat good. Although they feel they are doing a good job, most (72% somewhat good) recognize that they could be doing more.

How do you perform when it comes to protecting the environment?

Q1. To begin, how would you rate your own personal performance when it comes to protecting the environment?
(Base: All respondents, n=1,206)



There are no significant differences between teens and adults on this measure, however, personal performance ratings are significantly lower among Albertans under the age of 35 compared to their counterparts over the age of 35 – 81% good job among teens aged 15 to 17 and 83% among those aged 18 to 34 versus 90% among Albertans aged 35 or older.

It is interesting to note that there is a linkage between perceptions of personal performance and environmental behaviours. For example, overall incidence of recycling/returning beverage containers is significantly higher among those who say they do a very good job (99%) or good job (97%) than those who say they do a poor job (92%), and reported incidence of always recycling/returning milk containers increases significantly with perceived personal performance – from 50% among those who say they do a poor job, to 74% among those who say they do a somewhat good job to 83% among those who say they do a very good job.

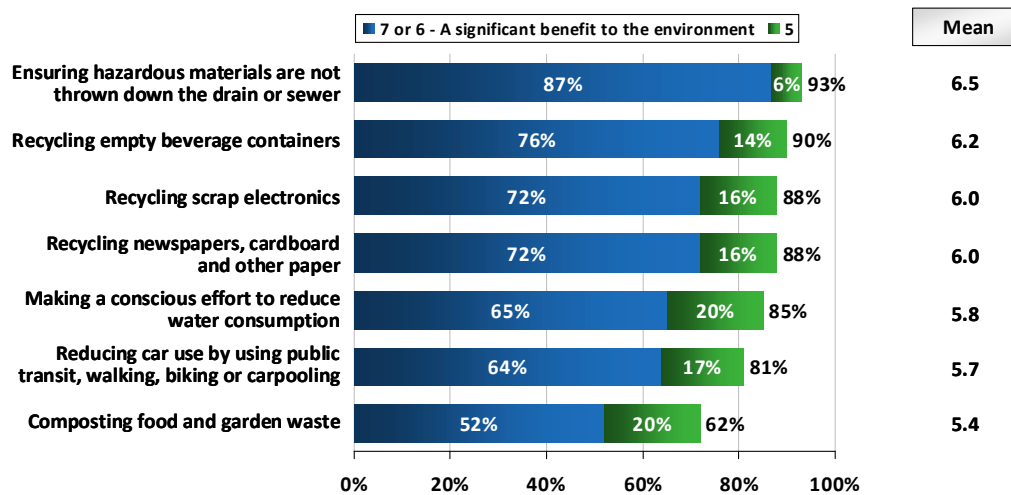
Perceived Impact of Environmental Behaviours

Albertans clearly recognize the importance of recycling empty beverage containers.

Three-quarters (76%) say recycling empty beverage containers has a significant benefit to the environment (a rating of 7 or 6 on a 7-point scale), trailing ensuring hazardous materials are not thrown down the drain or sewer (87%), but slightly ahead of recycling scrap electronics (72%) and recycling newspapers, cardboard and other paper (72%).

How much do these activities benefit the environment?

Q2. What follows is a list of things some people do to protect the environment. To the best of your knowledge, how much does each of these activities benefit the environment? (Base: All respondents, n=1,206)



While there are no significant differences between teens and adults, it is notable that significantly fewer youth aged 18 to 24 think recycling empty beverage containers has a significant benefit to the environment (66%) compared to adults aged 35 to 54 (77%) and 55 or older (79%). In fact, ‘significant benefit to the environment’ ratings are lower for five of the seven activities assessed among youth aged 18 to 24 compared to Albertans aged 35 or older.

BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS

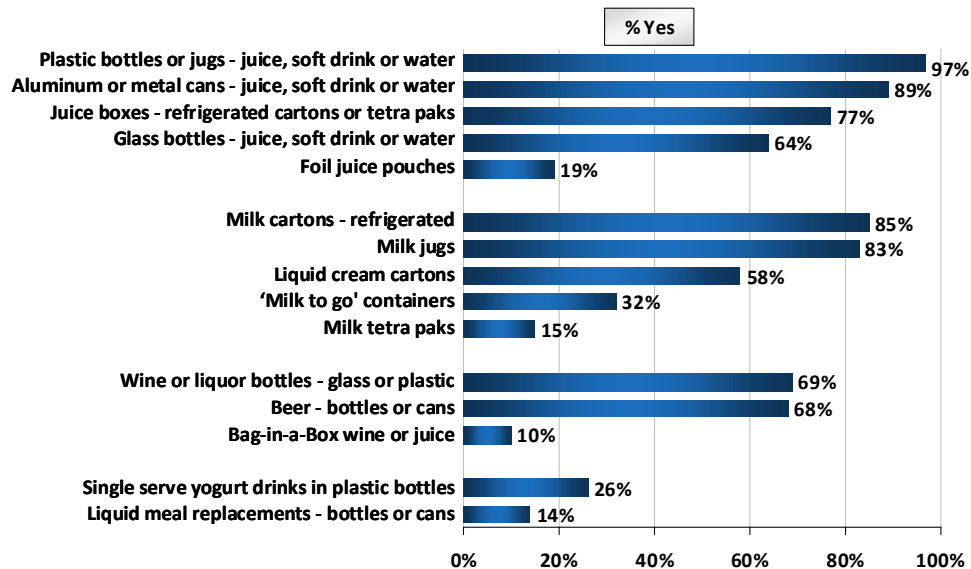
Past Six Months Purchase of Beverage Containers

In order to better understand awareness of refundable containers and beverage container recycling behaviours, respondents were asked what types of containers their household purchases.

Past six months purchase of 'milk to go' containers, milk tetra paks, foil juice pouches, bag-in-a-box wine or juice, single serve yogurt drinks and liquid meal replacements is markedly lower than other types of beverage containers.

Does your household purchase these beverage containers?

Q4. Thinking about the past 6 months, please indicate if your household has purchased the following types of beverages/beverage containers. (Base: All respondents, n=1,206)

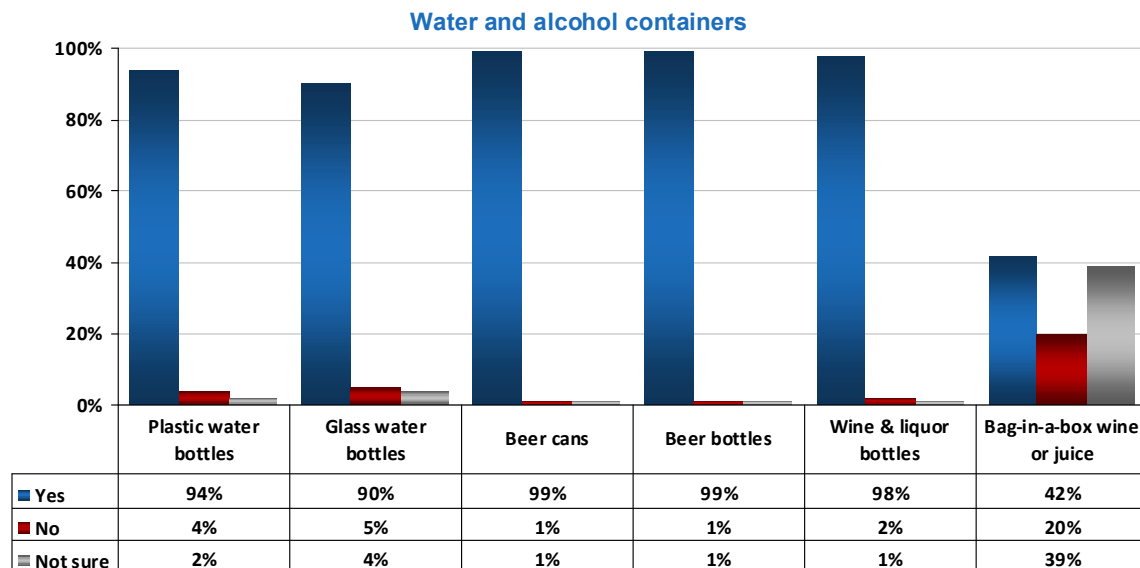
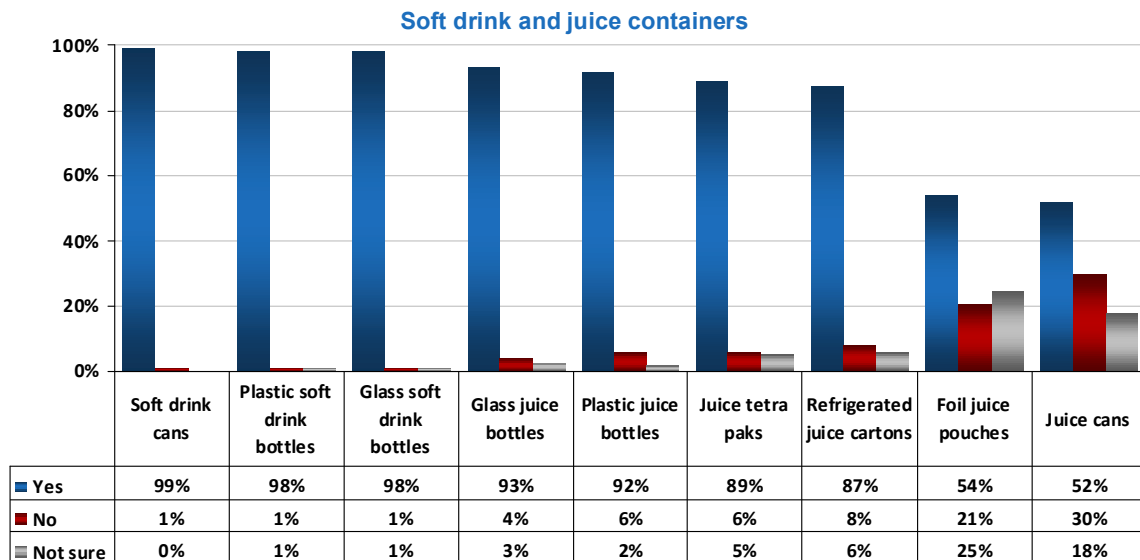


Awareness of Refundable Beverage Containers

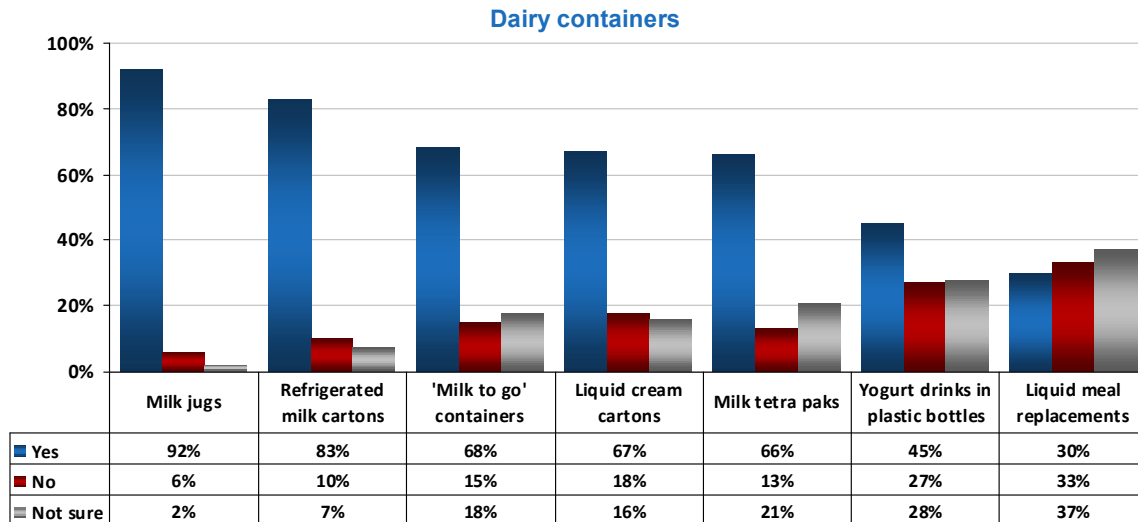
Awareness that most types of soft drink, juice, water and alcoholic beverage containers can be returned for a refund is extremely high – the exceptions being foil juice pouches, juice cans and bag-in-a-box wine or juice. One should note that these are also among the least purchased beverage containers. It is interesting that awareness that foil juice pouches can be returned for a refund is significantly higher among teens aged 15 to 17 (76%) compared to adults (54%) (past six months purchase is also higher).

What can be returned for a refund?

Q3. To the best of your knowledge, please indicate if each of the following types of beverage containers can be returned to a bottle depot for a refund? (Base: All respondents, n=1,206)



Eighteen months after introducing a deposit fee for dairy containers, awareness that plastic milk jugs can be returned for a refund tops the 90% mark, while awareness that milk cartons are refundable is high (83%) though comparatively lower. However, only two-thirds of Albertans are aware that liquid cream cartons, ‘milk to go’ containers or milk tetra paks can be returned for a refund, while less than half are aware of the refundable deposit on yogurt drinks and liquid meal replacements.

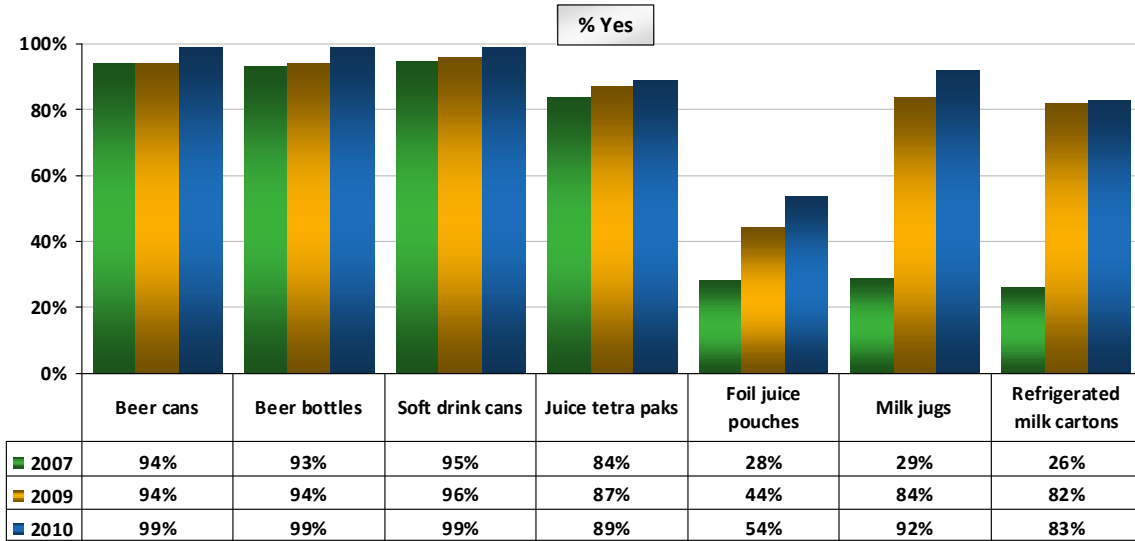


Considering tenure in Alberta, it is noteworthy that awareness if beverage containers can be returned for a deposit is lowest among past five years newcomers to Alberta (this holds for the majority of container types).

2010 sees a **significant 8 percentage point increase** in awareness that plastic milk jugs can be returned for a refund (from 84% in 2009 to 92% in 2010), while awareness regarding milk cartons has remained flat. Awareness that foil juice pouches are refundable also continues to show positive movement.

Tracking Changes – What can be returned for a refund?

Q3. To the best of your knowledge, please indicate if each of the following types of beverage containers can be returned to a bottle depot for a refund? (Base: All respondents, 2010: n=1,206, 2009: n=1,339)



Incidence of Beverage Container Recycling and Redemption

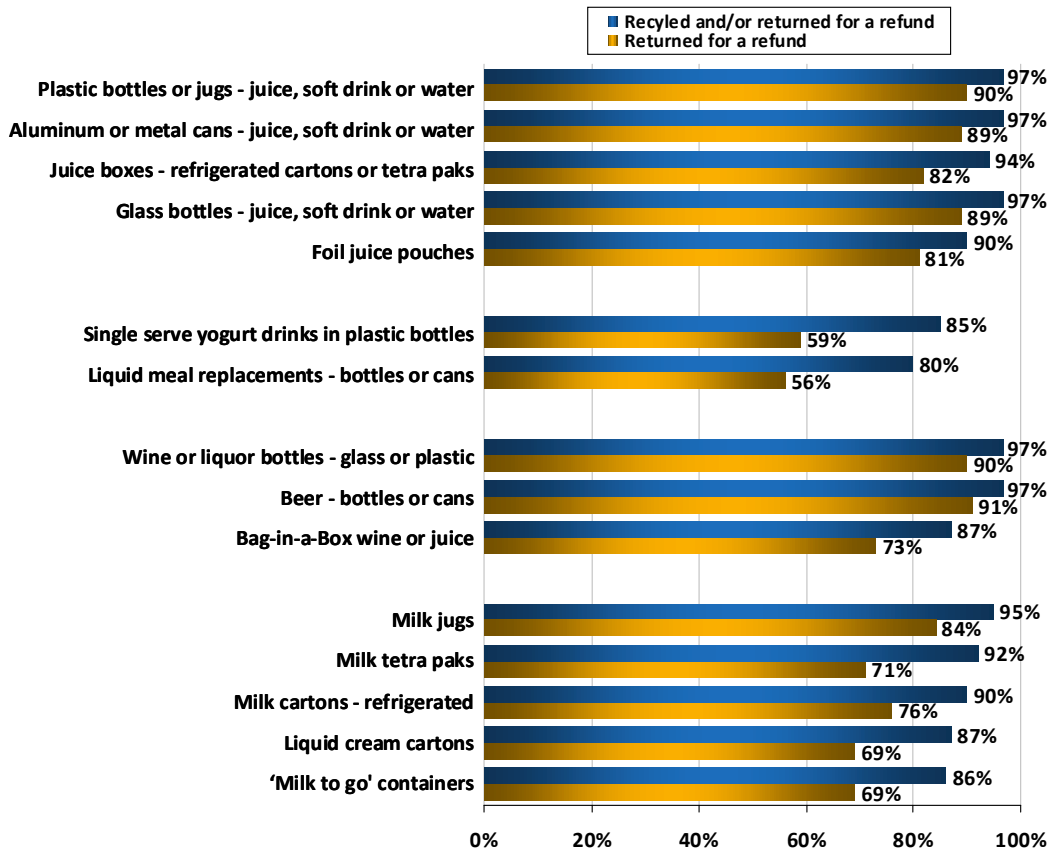
Among Albertans who have purchased each type of beverage container, reported incidence of recycling (via any means) is 85% or higher for all categories with the exception of liquid meal replacements (80%). With regards to returning containers for a refund, dairy containers tend to lag.

Container types that less than eight-in-ten purchasers report returning to a bottle depot are bag-in-a box wine or juice (73%), milk cartons (76%), milk tetra paks (71%), liquid cream cartons (69%), 'milk to go' containers (69%), yogurt drinks (59%) and liquid meal replacements (56%).

What does your household do with these beverage containers?

Past 6 months purchasers

Q5A. Thinking about the past 6 months, please indicate if your household has recycled or returned for a refund each of the following types empty beverage containers. (Base: Have purchased in the past 6 months)



It is notable that recycling dairy containers (by any means) is significantly higher among Albertans who have curbside recycling than those who do not. This holds true for milk jugs (97% vs. 93%), milk cartons (94% vs. 86%), liquid cream cartons (91% vs. 83%), 'milk to go' containers (90% vs. 82%) and liquid meal replacements (86% vs. 72%).

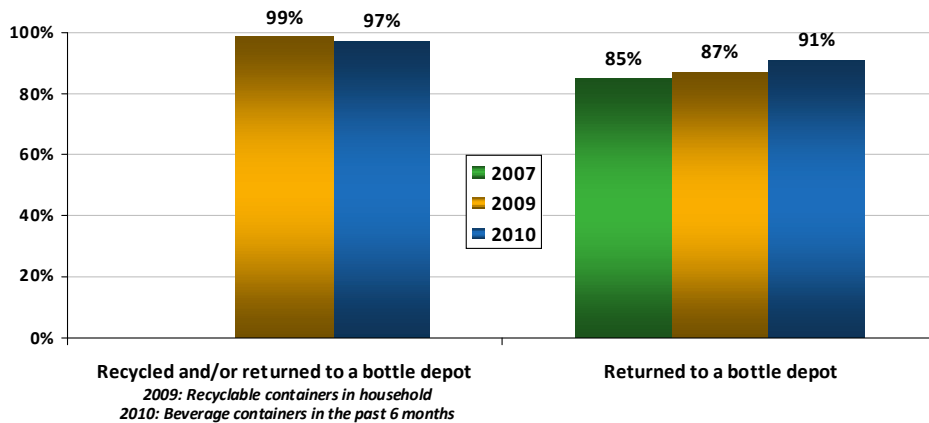
Reported recycling (by any means) of beverage containers in the past six months is near universal (97%) among Albertans, and nine-in-ten (91%) indicate they have returned beverage containers to a bottle depot in the same time frame.

Though still very high, incidence of recycling (by any means) is significantly lower among past 5 years newcomers to Alberta (92%) compared to longer term residents (97%), while incidence of redemption is only 80% among past 5 years newcomers versus 92% among longer term residents.

Reported incidence of returning containers to a bottle depot is also significantly higher among residents of the rural south (96%) compared to their counterparts in Edmonton (88%) and Calgary (90%), as well as among Albertans aged 55 or older (94%) compared to those aged 18 to 34 (89%).

Has your household recycled and/or returned beverage containers to a bottle depot in the past 6 months?

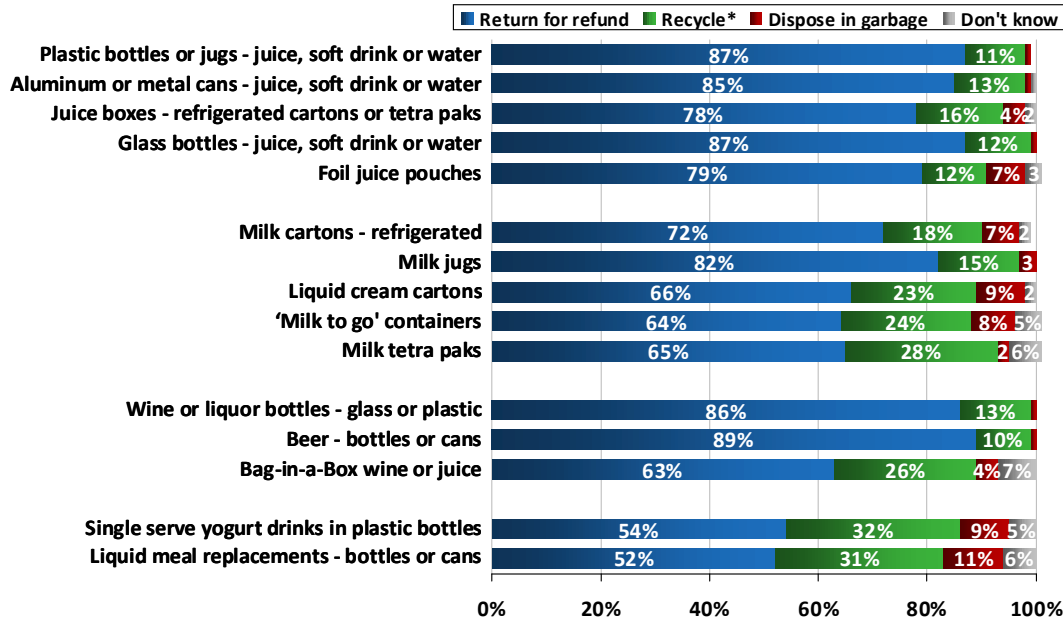
(Base: All respondents)



Returning beverage containers for a refund is the predominant means of disposing of all container types. While one-in-ten or fewer purchasers indicate they dispose of any type of container in the garbage *most often*, reported incidence is highest for liquid meal replacements, yogurt drinks, liquid cream cartons, 'milk to go' containers, milk cartons and foil juice pouches.

What do you do with these beverage containers most often? Past 6 months purchasers

Q5b. Thinking about the past 6 months, what your household does with each type of empty beverage container **most often**?
(Base: Have purchased in the past 6 months)



*Recycle = blue box/cart, public bin, donate to charity or leave for bottle collectors

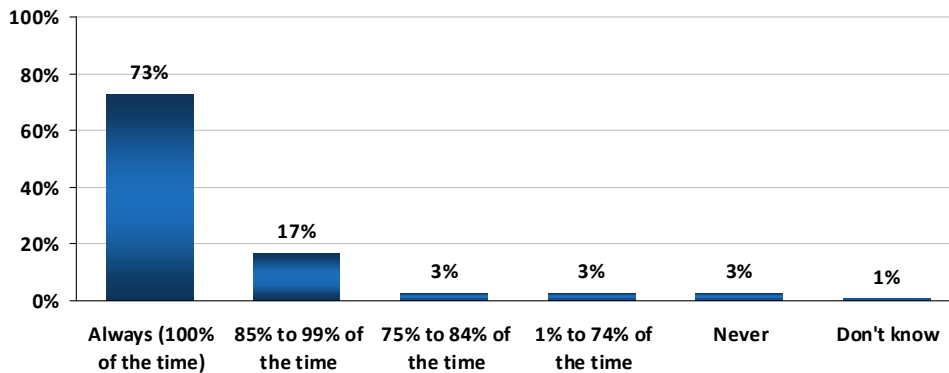
Frequency of Recycling or Returning Milk Containers for a Refund

Almost three-quarters (73%) of Albertans say they *always* recycle or return milk and cream containers, while just 3% say they never do.

It is notable that 79% of households with curbside recycling say they *always* recycle or return milk and cream containers versus 65% of households that do not have curbside recycling. Reported incidence of *always* recycling or returning milk and cream containers is also significantly higher among Albertans aged 55 or older (80%) and 35 to 54 (76%) compared to younger residents aged 25 to 34 (65%) and 18 to 24 (53%).

How often do you recycle or return milk and cream containers?

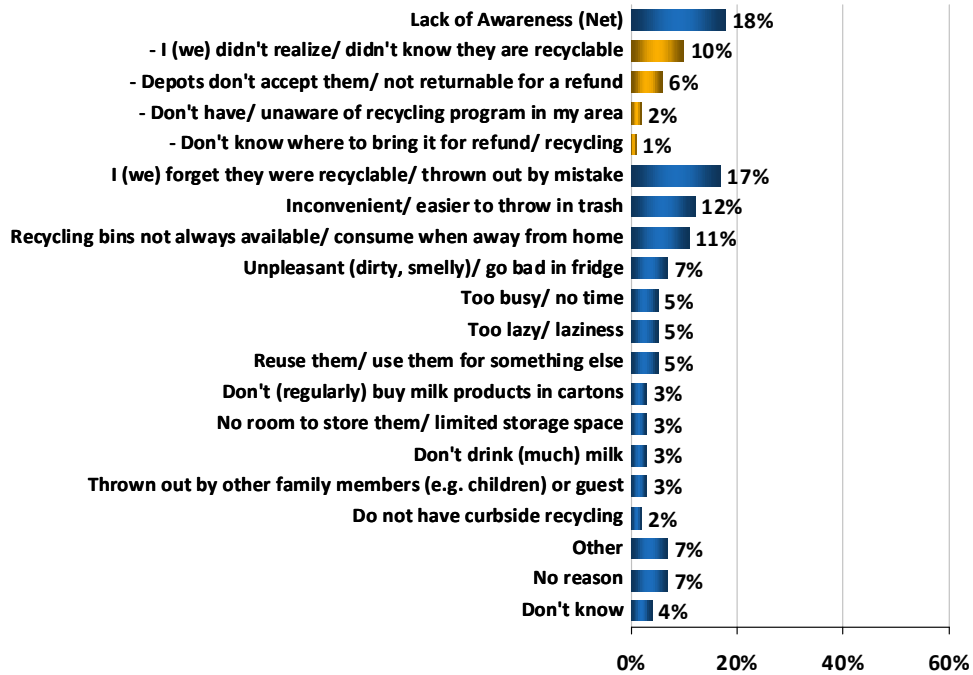
Q6a. Thinking specifically about milk and cream containers (cartons, jugs or milk-to-go), approximately how often would you say your household recycles them or returns them to a depot for a refund? (Base: Purchased milk or cream in the past 6 months, n=1,189)



The most frequent reasons given for not *always* recycling or returning milk and cream containers are lack of awareness (18%), simply forgetting (17%), inconvenience (12%) and recycling options not always being available (11%).

Why don't you recycle or return milk and cream containers all the time?

Q6b. Why doesn't your household always recycle or return (for a refund) milk and cream cartons?
(Base: Past 6 months purchase but do not recycle/return all of the time, n=302)

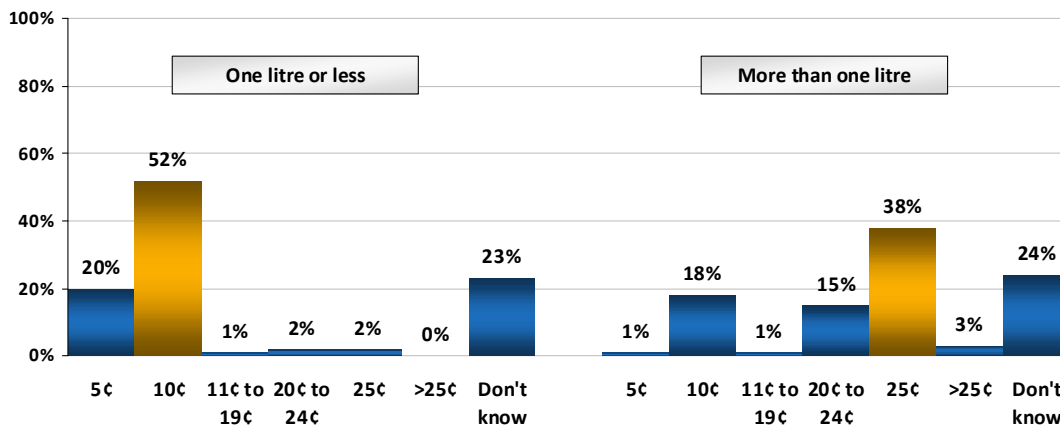


Awareness of Refundable Deposit for Beverage Containers

Half of Albertans are aware of the refundable deposit for beverage containers that are one litre or less, while four-in-ten are aware of the deposit for beverage containers more than one litre in size. Half (52%) of Albertans correctly specify 10 cents as the refundable deposit on beverage containers that are one litre or less, while another 20% say 5 cents and one-quarter (23%) 'don't know'. There is less clarity regarding the refundable deposit for containers more than one litre in size. Four-in-ten (38%) correctly say 25 cents while another 15% are close at 20 to 24 cents. Two-in-ten (18%) say 10 cents, while one-quarter (24%) 'don't know'.

What is the refundable deposit?

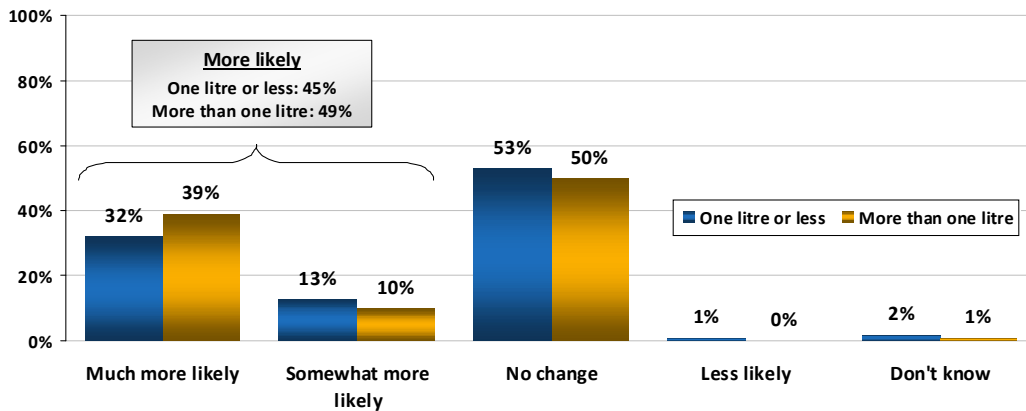
Q7a/7b. To the best of your knowledge, what is the refundable deposit for beverage containers that are one litre or less in size/ more than one liter in size? (Base: All respondents, n=1,206)



Among those unable to cite the refundable deposit value, just under half say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while about half say it would make no difference. The percentage of past five years newcomers to Alberta who say knowing the deposit value would make them more likely to return containers for a refund is significantly higher at 69% for containers one litre or less and 65% for containers more than one litre in size.

Does knowing the deposit value make you more likely to return containers for a refund?

Q8a/8b. In fact, the refundable deposit for all beverage containers that are one litre or less in size is 10¢/more than one litre in size is 25¢. Knowing this would you be more likely or less likely to return your empty beverage containers to a bottle depot, or would it have no change on your behaviour? (Base: Unaware of deposit value, 10¢: n=576, 25¢: n=743)

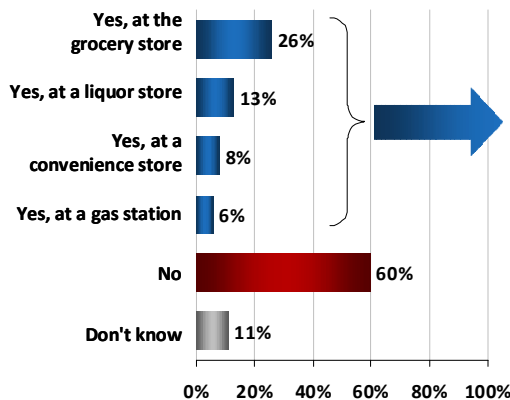


Recall of Information about Refundable Deposits

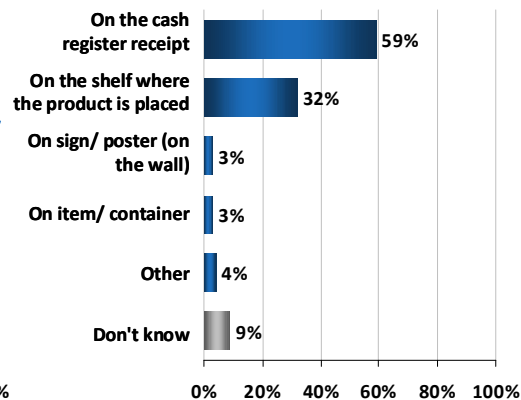
Four-in-ten (39%) Albertans say they have seen information at retail stores that identifies the refundable deposit on beverage containers. One quarter (26%) at grocery stores, 13% at a liquor store, 8% at a convenience store and 6% at a gas station. Cash register receipts (59%) are by far the most common channel, followed by the shelf where the product is placed (32%).

Have you seen any information at retail stores that identifies the deposit value?

Q9a. Do you recall seeing any information in the following types of retail stores that identifies the refundable deposit value on beverage containers you purchase? (Base: All respondents, n=1,206)



Q9b. Where do you recall seeing information in a retail store that identifies the refundable deposit value on beverage containers you purchase? (Base: Have seen information, n=339)



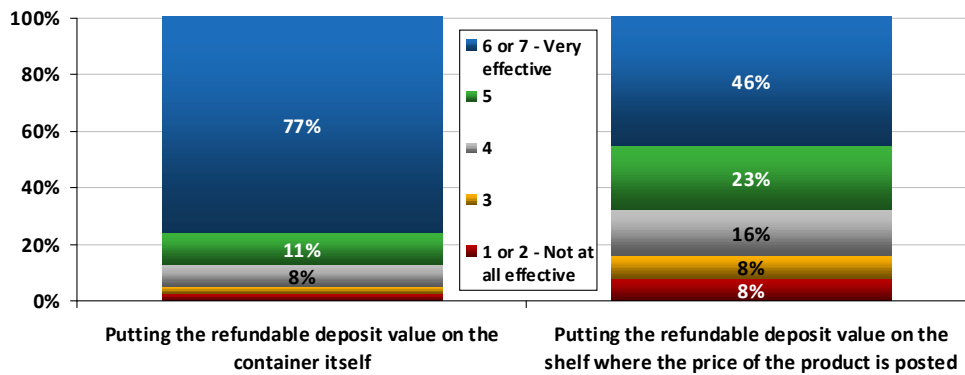
Means of Increasing Public Awareness about Refundable Beverage Containers

While Albertans think putting the refundable deposit value on the container itself (77% very effective) or on the shelf where the product is placed (46% very effective) would both be effective means of increasing awareness, the former would clearly be the more effective measure.

It is interesting that the percentage of youth aged 18 to 24 who think putting the refundable deposit value on the container itself would be very effective (65%) is significantly lower compared to Albertans aged 35 to 54 (80%) and 55 or older (77%).

How effective would these measures be for increasing awareness?

Q10. The Beverage Container Management Board, or BCMB, is responsible for the recycling of empty beverage containers in Alberta. If the BCMB wanted to increase your awareness of the types of beverage containers that can be returned for a refund as well as the value of the refundable deposit, how effective would each of the following be? (Base: All respondents, n=1,206)

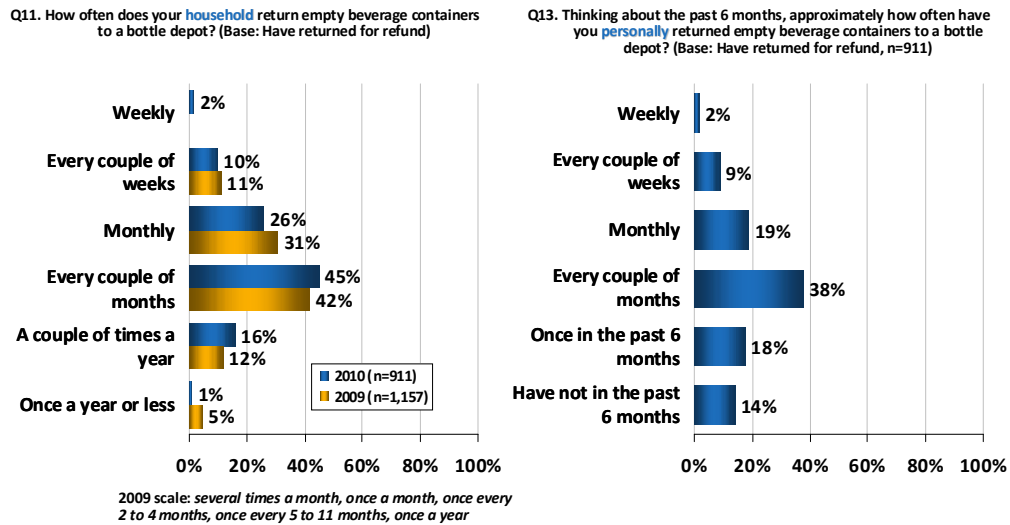


BOTTLE DEPOTS

Frequency of Visitation

Among Albertans who have returned beverage containers to a bottle depot in the past six months, four-in-ten (38%) report visiting a depot at least once a month, while another 45% make a trip every couple of months and 16% do so a couple of times a year. Further, 86% of Albertans whose households have returned items for a refund indicate they have personally visited a depot in the past six months.

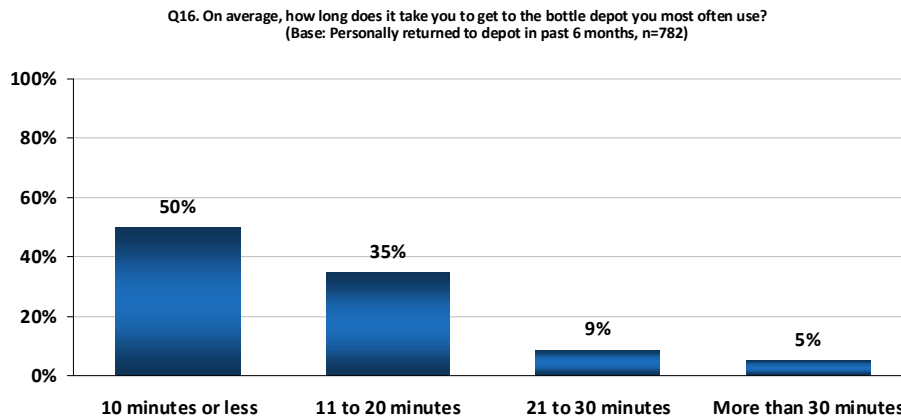
How often do you return containers to a bottle depot?



Travel Time to Bottle Depots

Half of past six months visitors say it takes 10 minutes or less to get to the bottle depot they use most often, while just 14% say it takes more than 20 minutes (this increases to 24% among rural Albertans).

How long does it take you to get to your bottle depot?



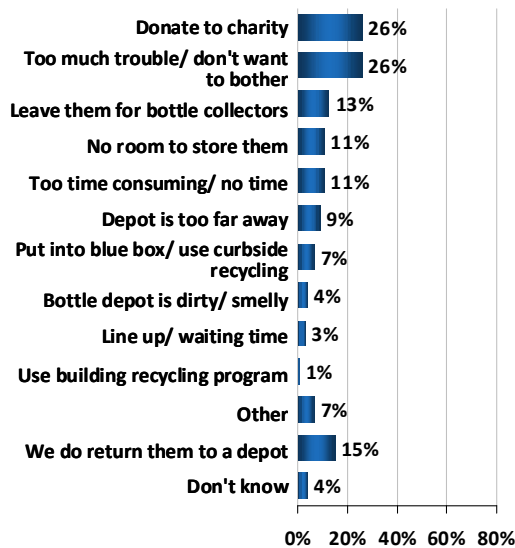
Reasons for Not Returning Beverage Containers to Depots or Not Returning More Often

Among the minority of Albertans who have not returned beverage containers to a depot in the past six months, many indicate they recycle the containers instead – 26% ‘donate to charity’, 13% ‘leave them for bottle collectors’, 7% ‘put into blue box’ and 1% ‘use the building recycling program’. Other reasons given include ‘too much trouble’ (26%), no room to store them (11%) and ‘too time consuming’ (11%). Issues with bottle depots themselves are limited – 9% say the ‘depot is too far away’, 4% say the ‘bottle depot is dirty or smelly’ and 3% point to the ‘line up or waiting time’.

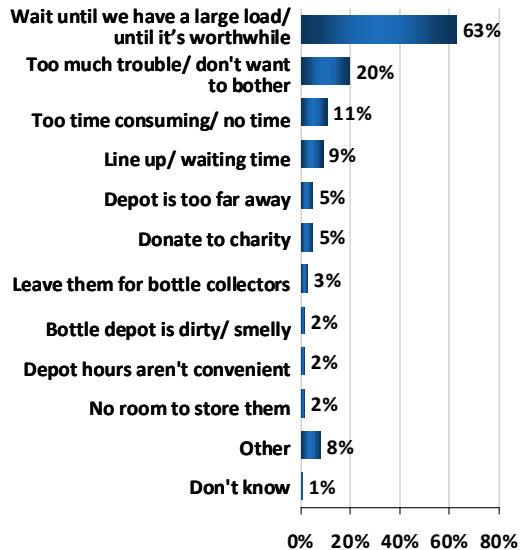
The predominant reason for visiting a bottle depot a couple of times a year or less is simply waiting ‘until we have a large load or until it’s worthwhile’ (63%).

Why don't you return containers to a depot, or why not more often?

Q12a. Why **doesn't your household** currently return empty beverage containers to a bottle depot for a refund? (Base: Have not returned for refund, n=101)



Q12b. Why doesn't your household return empty beverage containers to a bottle depot for a refund **more often**? (Base: Have returned for refund less than every couple of months, n=158)

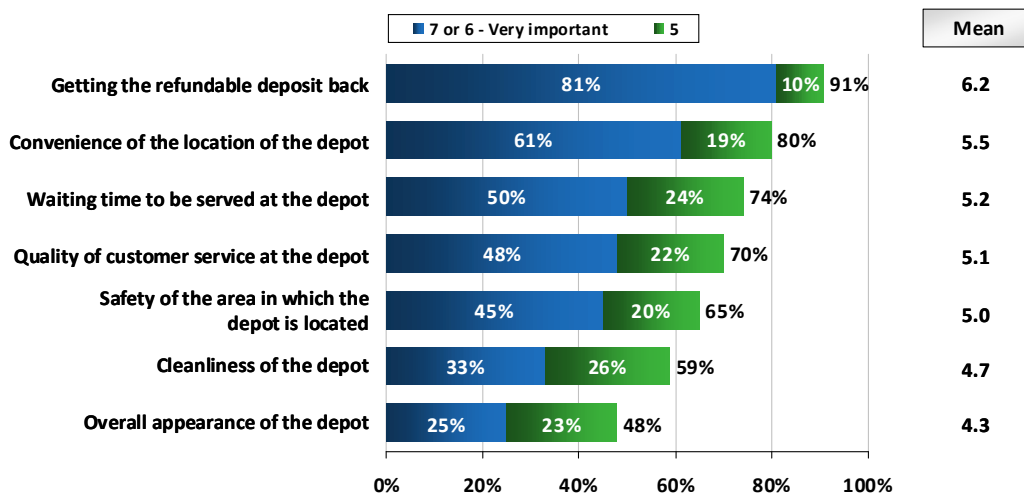


Importance of Bottle Depot Attributes

For Albertans who have visited a depot in the past six months, the most important factor influencing their decision whether or not to return containers to a depot is getting the refundable deposit back (81% very important), followed by convenience of the location (61% very important). In the next tier are waiting time (50% very important), customer service (48% very important) and safety of the depot location (45%), while cleanliness (33% very important) and overall appearance (25% very important) of the depot are the least important factors.

How important are these factors when deciding whether or not to return beverage containers to a bottle depot?

Q14. Please indicate how important each of the following factors is to you when deciding whether or not to return empty beverage containers to a bottle depot. (Base: Personally returned to depot in past 6 months, n=782)



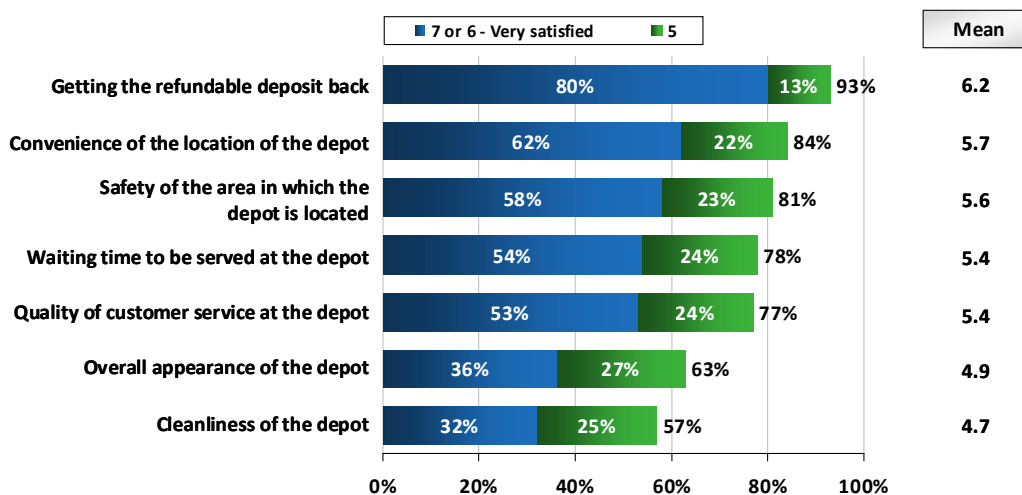
Satisfaction with Bottle Depot Attributes

Satisfaction with most aspects of bottle depots is very high. More than half of Albertans are very satisfied with getting the refundable deposit back (80%), convenience of the location (62%), safety of the depot location (58%), waiting time (54%) and customer service (53%). Comparatively lower is satisfaction with the overall appearance (36% very satisfied) and cleanliness (32% very satisfied) of the depot.

It is notable that satisfaction with all aspects of bottle depots (considering very satisfied ratings) is lowest among youth aged 18 to 24 and significantly lower than their counterparts aged 25 or older for getting the deposit back (59%), waiting time (34%), safety (40%), customer service (27%) and cleanliness (13%).

How satisfied are you with these aspects of the bottle depot?

Q15. Thinking about your most recent experience returning empty beverage containers to a bottle depot, please indicate your satisfaction with each of the following. (Base: Personally returned to depot in past 6 months, n=782)



When the data are analyzed further, a number of significant regional differences emerge. Considering very satisfied ratings:

- Satisfaction with the safety of the area in which the depot is located is significantly higher among residents of smaller cities north and south (66%) compared to their counterparts in Calgary (53%).
- Satisfaction with the waiting time to be served is significantly higher among residents of smaller cities south (65%) compared to residents of Edmonton (50%).
- Satisfaction with customer service is significantly higher among residents of smaller cities south (62%), the rural north (62%) and the rural south (63%) versus their counterparts in Calgary (47%) and Edmonton (46%).
- Satisfaction with the overall appearance of the depot is also significantly higher among residents of smaller cities south (47%), the rural north (45%) and the rural south (44%) versus their counterparts in Calgary (30%) and Edmonton (28%). Satisfaction among

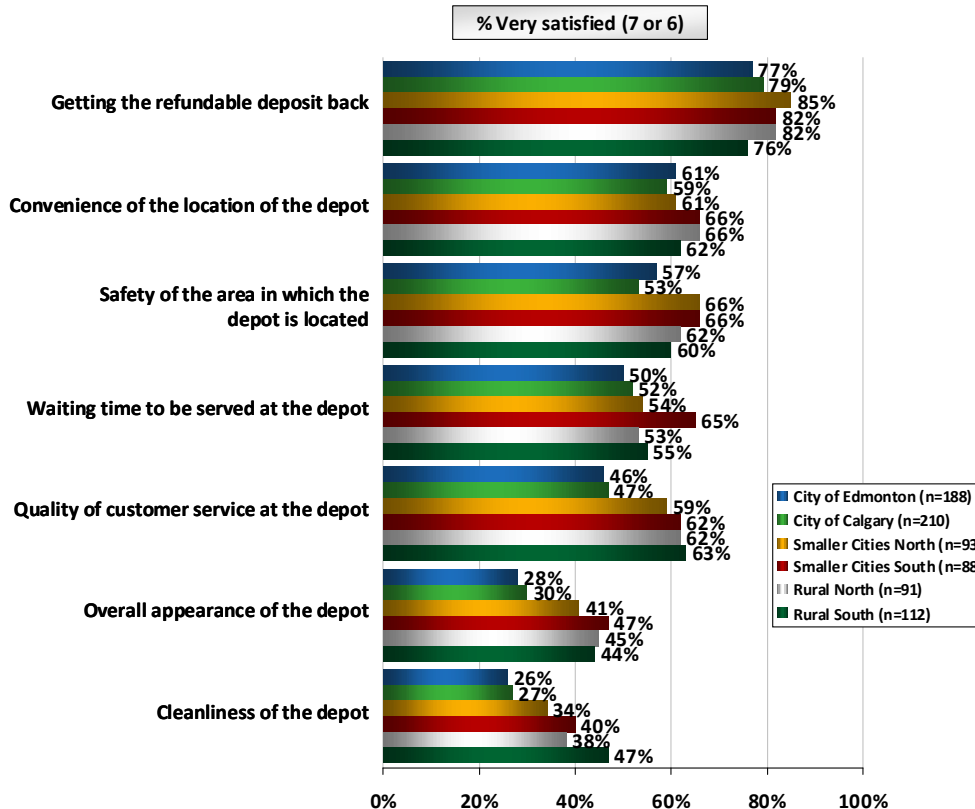
residents of smaller cities north (41%) is also significantly higher than Edmonton.

- Satisfaction with the cleanliness of the depot is significantly higher among residents of smaller cities south (40%) and the rural south (47%) compared to residents of Calgary (27%) and Edmonton (26%). Satisfaction among residents of the rural north (38%) is also significantly higher than Edmonton.

How satisfied are you with these aspects of the bottle depot?

By Region

Q15. Thinking about your most recent experience returning empty beverage containers to a bottle depot, please indicate your satisfaction with each of the following. (Base: Personally returned to depot in past 6 months)



Action Grid Analysis

In order to help the BCMB prioritize future efforts to improve various aspects of bottle depots, action grid analysis was undertaken to identify primary weaknesses and primary strengths. An action grid is a two-dimensional graph that takes into account both importance and performance (i.e. satisfaction).

Attributes are located in one of four quadrants:

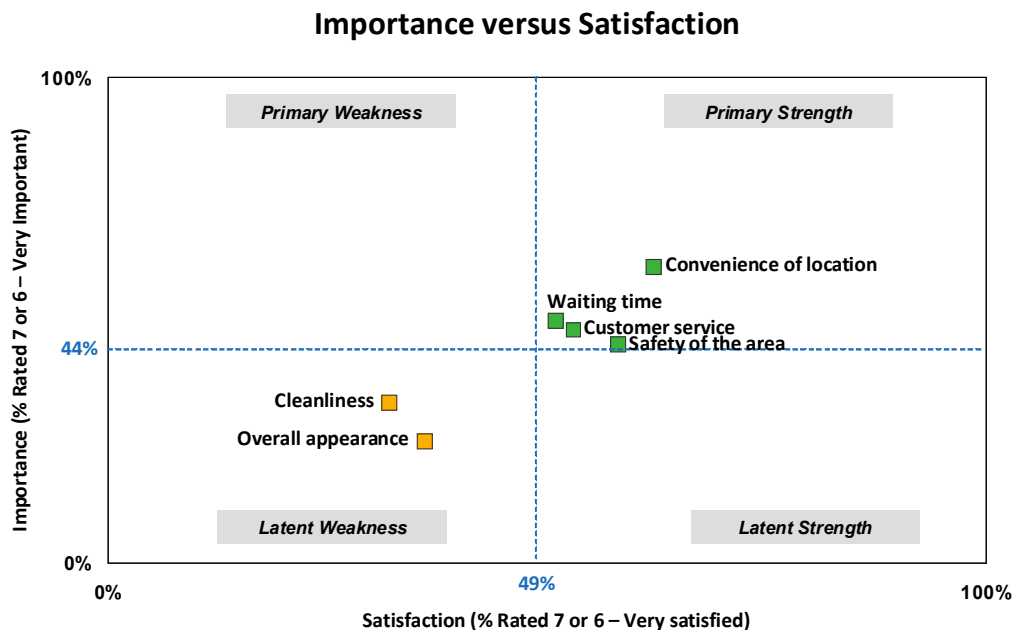
- Primary Strengths – Items in the top right quadrant are key strengths and performance should be maintained or improved.
- Primary Weaknesses – Items in the top left quadrant are ‘priority areas for improvement’ as they are considered important, however, satisfaction is relatively lower and there is

considerable room for improvement. Moving these items into the top right quadrant should have a positive impact on overall satisfaction with programs and services.

- Latent Weaknesses – Items in the bottom left quadrant are ‘longer-term action items’ and should be addressed when resources permit. There is room for positive movement in satisfaction ratings and increases in importance ratings could move them to the Primary Weakness quadrant.
- Latent Strengths – Items in the bottom right quadrant are ‘low maintenance’ as satisfaction is relatively high and importance is relatively low.

The line of delineation is calculated by taking the average of the ‘very important’ scores (i.e. rating of 6 or 7) for both importance and satisfaction. Therefore, these lines will shift from year to year. It is important to keep in mind that both importance and satisfaction are *relative* rather than based on a pre-defined measure – thus, items in the upper half of the action grid are relatively more important and those in the lower half are relatively less important. “Getting the refundable deposit back” has not been included in this analysis as it is not a key attribute of the depots.

Primary Strengths of bottle depots are: convenience of location, safety of the area, customer service and waiting time. Satisfaction with these attributes should be maintained. There are no primary weaknesses that need to be addressed. Cleanliness and the overall appearance of depots are both latent weaknesses – while satisfaction is comparatively lower, so too is importance.



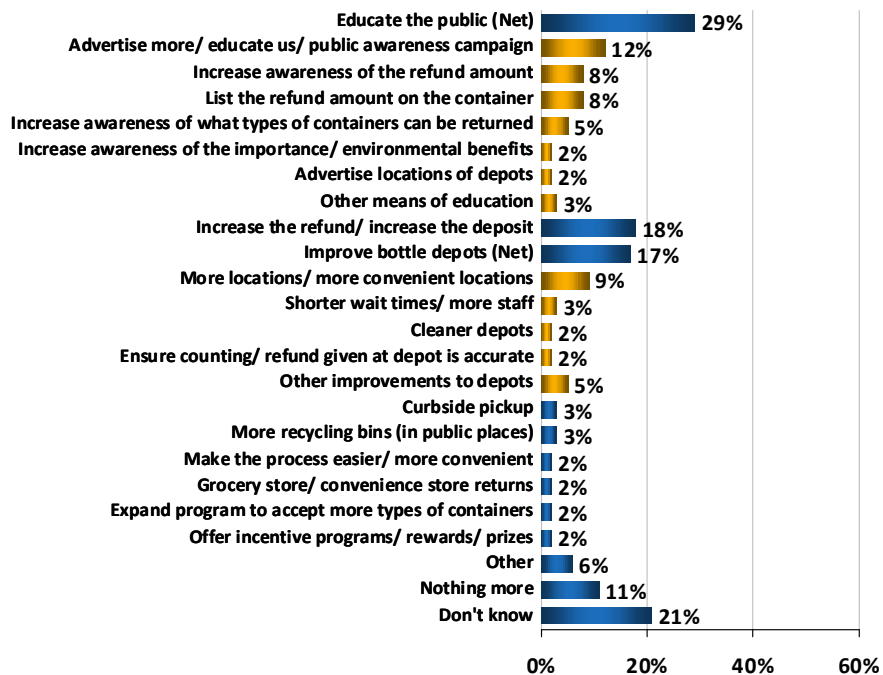
THE OVERALL RETURN RATE

Opportunities for Increasing the Overall Return Rate for Beverage Containers

When asked what the BCMB could do to increase the overall return rate of beverage containers, the most frequent suggestions are educating the public on a number of dimensions (29%), increasing the refundable deposit (18%) and improving various aspects of bottle depots (17%), primarily more locations or more convenient locations (9%).

What could BCMB do to increase recycling of beverage containers?

Q17. What, if anything, could the Beverage Container Management Board do to increase the number of empty beverage containers that are recycled or returned to depots? (Base: All respondents, n=1,206)



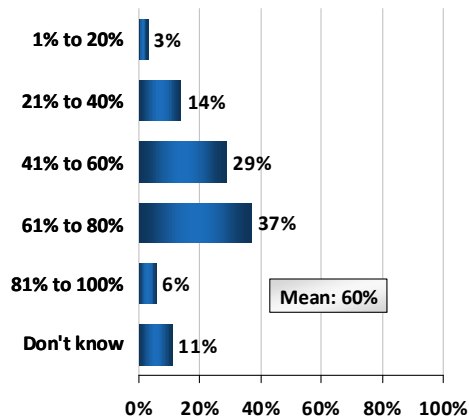
Awareness of the Overall Return Rate for Beverage Containers

As might be expected, Albertans are not knowledgeable about the overall rate of return for beverage containers. When asked, two-thirds (66%) guess in the 41% to 80% range, while just 6% say 81% or higher.

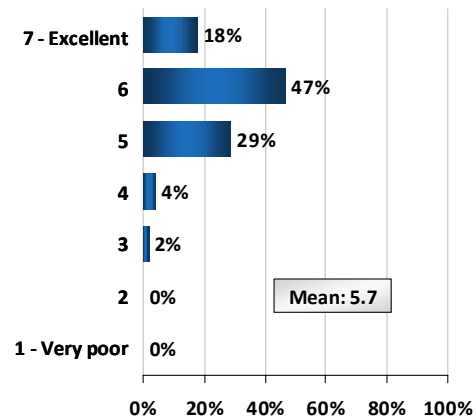
When told the actual return rate in 2009 was 82%, two thirds of Albertans (65%) deem it as being excellent (rating of 6 or 7).

What is the return rate for beverage containers?

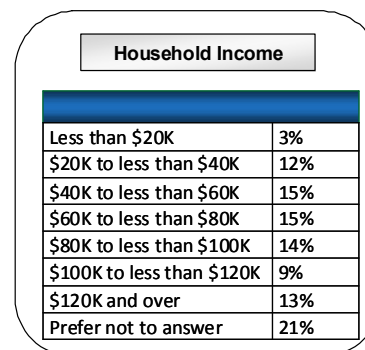
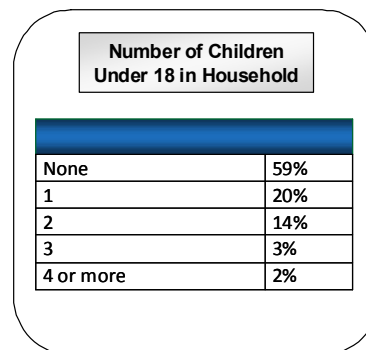
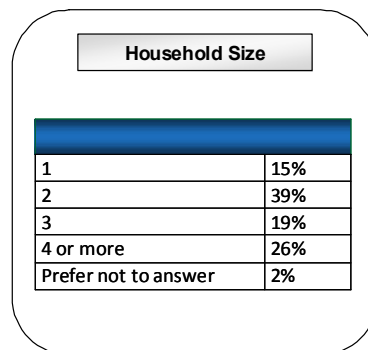
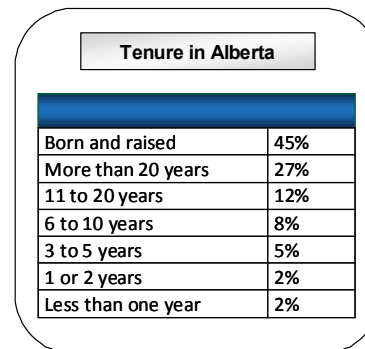
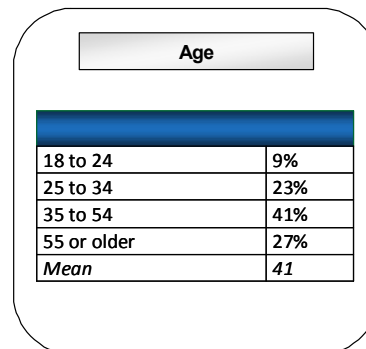
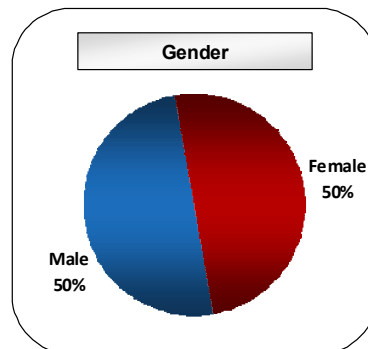
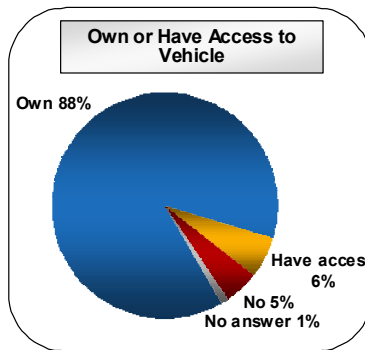
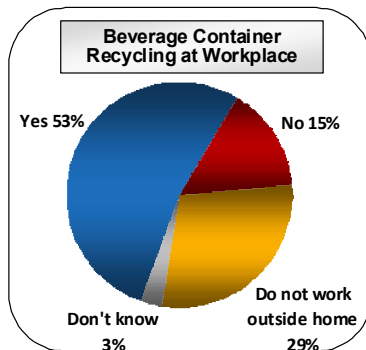
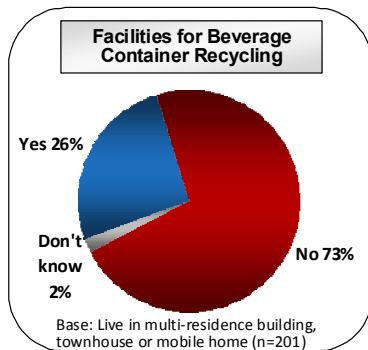
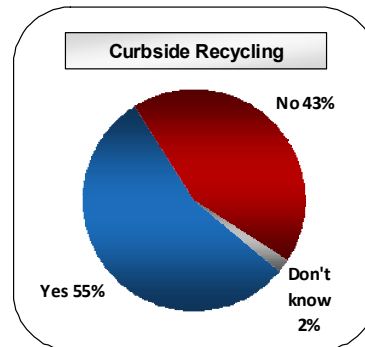
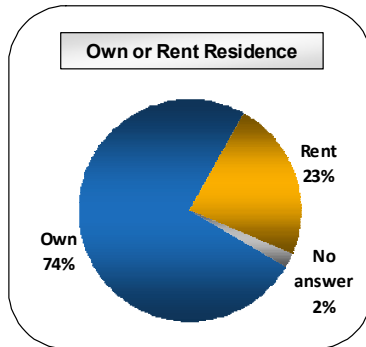
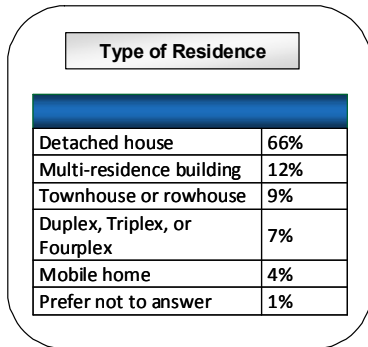
Q18. What percentage of beverage containers sold in Alberta do you think are recycled or returned to depots every year?
(Base: All respondents, n=1,206)



Q19. In 2009, the overall return rate for beverage containers in Alberta was 82%. Would you say this is...?
(Base: All respondents, n=1,206)



RESPONDENT CHARACTERISTICS



APPENDIX A: SURVEY QUESTIONNAIRE

BEVERAGE CONTAINER MANAGEMENT BOARD 2010 ONLINE SURVEY Final Questionnaire November 21, 2010

Introduction at Site

[INSERT STANDARD PANEL INTRODUCTION]

Screening

S1. What is your age?

Month / Year of birth [NUMERIC FIELD]

[TRACK AGE QUOTAS BASED ON S1: 18 TO 24, 25 TO 34, 35 TO 54, 55 OR OLDER]

S2. What is your gender?

Please select one response only

Male
Female

[TRACK GENDER QUOTAS BASED ON S2]

S3. In what country do you live?

Please select one response only

USA
Canada
Australia
United Kingdom
Other

[CONTINUE IF CANADA, ELSE THANK & TERMINATE]

S4. What are the first three digits of your postal code?

*Please enter in **letter number letter** format with no spaces*

TEXT BOX [ENSURE INPUT IS ALPHA-NUMERIC-ALPHA FORMAT]

[TRACK REGION QUOTAS BASED ON S1: CITY OF EDMONTON: n=300, CITY OF CALGARY: n=300, SMALLER CITIES NORTH: n=150, SMALLER CITIES SOUTH: n=150, RURAL NORTH: n=150, RURAL SOUTH: n=150]

General Attitudes

1. To begin, how would you rate your own personal performance when it comes to protecting the environment?

Please select one response only

I do a very good job
I do a somewhat good job
I do a somewhat poor job
I do a very poor job

2. What follows is a list of things some people do to protect the environment. To the best of your knowledge, how much does each of these activities benefit the environment?

Please select one response for each item

[ACROSS TOP OF GRID]

- 1 – No benefit to the environment
- 2
- 3
- 4
- 5
- 6
- 7 – A significant benefit to the environment

[DOWN SIDE OF GRID] [RANDOMIZE ORDER]

Recycling empty beverage containers
Recycling newspapers, cardboard and other paper
Recycling scrap electronics
Making a conscious effort to reduce water consumption
Reducing car use by using public transit, walking, biking or carpooling
Ensuring hazardous materials are not thrown down the drain or sewer (e.g. paint, pesticides, oil and chemicals)
Composting food and garden waste

Beverage Container Recycling Awareness and Behaviours

3. To the best of your knowledge, please indicate if each of the following types of empty beverage containers can be **returned to a bottle depot for a refund**.

Please select one response for each item

[ACROSS TOP OF GRID]

Yes

No

Not sure

[DOWN SIDE OF GRID] [INSERT PICTURE TO LEFT OF EACH ITEM]

Plastic soft drink bottles

Plastic juice bottles/jugs

Soft drink cans

Juice cans

Glass soft drink bottles

Glass juice bottles

Glass water bottles

Juice cartons from the refrigerated section of the store

Juice tetra paks (cardboard containers that do not require refrigeration until after they are opened)

Plastic water bottles

Foil juice pouches

Milk jugs

Milk cartons from the refrigerated section of the store

Milk tetra paks (cardboard containers that do not require refrigeration until after they are opened)

“Milk to go” containers

Cartons of liquid cream

Single serve yogurt drinks in plastic bottles

Liquid meal replacements in plastic bottles or metal cans

Beer bottles

Beer cans

Wine and liquor bottles (glass or plastic)

Bag-in-a-Box wine or juice

4. Thinking about the **past 6 months**, please indicate if your household has purchased the following types of beverages/beverage containers.

Please select one response for each item

[ACROSS TOP OF GRID]

Yes

No

Don't know

[DOWN SIDE OF GRID] [INSERT PICTURE TO LEFT OF EACH ITEM]

Plastic bottles or jugs – juice, soft drink or water

Glass bottles – juice, soft drink or water

Aluminum or metal cans – juice, soft drink or water

Juice boxes – refrigerated cartons or tetra paks

Foil juice pouches

Milk jugs

Milk cartons – refrigerated

Milk tetra paks

“Milk to go” containers

Liquid cream cartons

Single serve yogurt drinks in plastic bottles

Liquid meal replacements – bottles or cans

Beer – bottles or cans

Wine or liquor bottles – glass or plastic

Bag-in-a-Box wine or juice

5. Thinking about the **past 6 months**, please indicate: A) If your household has recycled or returned for a refund each of the following types empty beverage containers, and, B) What your household does with each type of empty beverage container **most often**.

Recycled includes recycling via a blue box/blue cart/curb side recycling, recycling bins in public areas, donating to a charity and/or leaving for bottle collectors

PLEASE SET UP GRID AS FOLLOWS

	A) Has your household recycled or returned these for a refund in the past 6 months? <i>Please select one response only</i>					B) What does your household do with this type of empty beverage container most often? <i>Please select one response only</i>
	Yes – Recycled	Yes – Returned to a bottle depot for a refund	Yes – Have recycled and have returned for a refund	No – Have not recycled or returned for a refund	Don't know	DROP-DOWN BOX

[ACROSS TOP OF GRID – FIRST ROW]

A) Has your household recycled or returned these for a refund in the past 6 months?

Please select all that apply for each item

[ACROSS TOP OF GRID – SECOND ROW – 5A]

- Yes – Recycled
- Yes – Returned to a bottle depot for a refund
- Yes – Have recycled **and** have returned for a refund
- No – Have **not** recycled or returned for a refund
- Don't know

[ACROSS TOP OF GRID – FIRST ROW]

B) What does your household do with this type of empty beverage container most often?

Please select one response only

[ACROSS TOP OF GRID – SECOND ROW – 5B]

- DROP-DOWN BOX:
- Dispose of it in the garbage
 - Recycle via a blue box/blue cart or curb side recycling
 - Recycle via recycling bins in public areas
 - Return to a bottle depot for a refund
 - Donate to a charity
 - Leave for bottle collectors
 - Don't know

[DOWN SIDE OF GRID]

[INSERT ITEMS SELECTED 'YES' IN Q4]

[ASK Q6 IF 'YES' TO ANY TYPE OF MILK OR CREAM CONTAINER IN Q4, ELSE SKIP TO Q7]

6. A. Thinking specifically about milk and cream containers (cartons, jugs or milk-to-go), approximately how often would you say your household **recycles them** (i.e. via a blue box/blue cart/curbside recycling, recycling bins in public areas, donating to a charity or leaving for bottle collectors) **or returns them to a depot for a refund?**

Please provide your best estimate. Please select one response only.

Always (100% of the time)

85% to 99% of the time

75% to 84% of the time

50% to 74% of the time

25% to 49% of the time

1% to 24% of the time

Never

Don't know

[IF ALWAYS SELECTED IN Q6, SKIP TO Q7, ELSE CONTINUE WITH Q6B]

6B. Why doesn't your household *always* recycle or return (for a refund) milk and cream cartons?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

Beverage Container Deposits

7. To the best of your knowledge, what is the refundable deposit for the following?

Please enter a numeric value in cents

A. Beverage containers that are **one litre or less** in size?

[NUMERIC RESPONSE. RANGE: 0 TO 200] ¢

Don't know

B. Beverage containers that are **more than one litre** in size?

[NUMERIC RESPONSE. RANGE: 0 TO 200] ¢

Don't know

[IF 10¢ IN Q7A, SKIP TO INSTRUCTION BEFORE Q8B, ELSE CONTINUE WITH Q8A]

8. **A.** In fact, the refundable deposit for all beverage containers that are **one litre or less** in size is **10¢**. Knowing this would you be more likely or less likely to return your empty beverage containers to a **bottle depot**, or would it have no change on your behaviour?

Please select one response only

Much more likely to return to a depot
Somewhat more likely to return to a depot
No change in likelihood to return to a depot
Somewhat less likely to return to a depot
Much less likely to return to a depot
Don't know

[IF 25¢ IN Q7B, SKIP TO Q9, ELSE CONTINUE WITH Q8B]

- 8B.** In fact, the refundable deposit for all beverage containers that are **more than one litre** in size is **25¢**. Knowing this would you be more likely or less likely to return your empty beverage containers to a **bottle depot**, or would it have no change on your behaviour?

Please select one response only

Much more likely to return to a depot
Somewhat more likely to return to a depot
No change in likelihood to return to a depot
Somewhat less likely to return to a depot
Much less likely to return to a depot
Don't know

9. **A.** Do you recall seeing any information in the following types of retail stores that identifies the refundable deposit value on beverage containers you purchase?

Please select all that apply

Yes, at the grocery store
Yes, at a liquor store
Yes, at a convenience store
Yes, at a gas station
No
Don't know

[ASK Q9B IF YES TO ANY IN Q9A, ELSE SKIP TO Q10]

- 9B.** Where do you recall seeing information in a retail store that identifies the refundable deposit value on beverage containers you purchase?

Please select all that apply

On the shelf where the product is placed
On the cash register receipt
Other (please specify)
Don't know

10. The Beverage Container Management Board, or BCMB, is responsible for the recycling of empty beverage containers in Alberta. If the BCMB wanted to increase your awareness of the types of beverage containers that can be returned for a refund as well as the value of the refundable deposit, how effective would each of the following be?

Please select one response for each item

[ACROSS TOP OF GRID]

- 1 – Not at all effective
- 2
- 3
- 4
- 5
- 6
- 7 – Very effective

[DOWN SIDE OF GRID] [RANDOMIZE ORDER]

Putting the refundable deposit value on the container itself

Putting the refundable deposit value on the shelf where the price of the product is posted

Bottle Depots

[ASK Q11 IF RETURNED TO A BOTTLE DEPOT FOR A REFUND TO ANY ITEM IN Q5, ELSE SKIP TO INSTRUCTION BEFORE Q12]

11. How often does your household return empty beverage containers to a bottle depot?

Please select one response only

- Weekly
- Every couple of weeks
- Monthly
- Every couple of months
- A couple of times a year
- Once a year or less
- Don't know

[ASK Q12A IF RETURNED TO A BOTTLE DEPOT FOR A REFUND NOT SELECTED FOR ANY ITEM IN Q5. ASK Q12B IF A COUPLE OF TIMES A YEAR OR ONCE A YEAR OR LESS SELECTED IN Q11. ALL OTHERS SKIP TO Q13.]

12. A. Why doesn't your household currently return empty beverage containers to a bottle depot for a refund?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

[SKIP TO Q17]

12B. Why doesn't your household return empty beverage containers to a bottle depot for a refund **more often**?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

[CONTINUE WITH Q13]

13. Thinking about the past **6 months**, approximately how often have you **personally** returned empty beverage containers to a bottle depot?

Please select one response only

Weekly

Every couple of weeks

Monthly

Every couple of months

Once in the past 6 months

I have **not** returned empty beverage containers to a depot in the past 6 months

Don't know

[IF I HAVE NOT RETURNED EMPTY BEVERAGE CONTAINERS OR DON'T KNOW IN Q13, SKIP TO Q17, ELSE CONTINUE WITH Q14]

14. Please indicate how important each of the following factors are to you when deciding whether or not to return empty beverage containers to a bottle depot.

Please select one response for each item

[ACROSS TOP OF GRID]

1 – Not at all important

2

3

4

5

6

7 – Very important

[DOWN SIDE OF GRID] [RANDOMIZE ORDER]

The convenience of the location of the depot

The safety of the area in which the depot is located

The waiting time to be served at the depot

The quality of customer service at the depot

The overall appearance of the depot

The cleanliness of the depot

Getting the refundable deposit back

15. Thinking about your **most recent** experience returning empty beverage containers to a bottle depot, please indicate your satisfaction with each of the following.

Please select one response for each item

[ACROSS TOP OF GRID]

1 – Not at all satisfied

2

3

4

5

6

7 – Very satisfied

[DOWN SIDE OF GRID] [RANDOMIZE ORDER]

The convenience of the location of the depot

The safety of the area in which the depot is located

The waiting time to be served at the depot

The quality of customer service at the depot

The overall appearance of the depot

The cleanliness of the depot

Getting the refundable deposit back

16. On average, how long does it take you to get to the bottle depot you most often use?

Please select one response only

10 minutes or less

11 to 20 minutes

21 to 30 minutes

More than 30 minutes

Don't know

Opportunities for Improvement

17. What, if anything, could the Beverage Container Management Board do to increase the number of empty beverage containers that are recycled or returned to depots?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

18. What percentage of beverage containers sold in Alberta do you think are recycled or returned to depots every year?

Please enter a number from 0 to 100

[NUMERIC RESPONSE. RANGE: 0 TO 100] %

Don't know

19. In 2009, the overall return rate for beverage containers in Alberta was 82%. Would you say this is...?

Please select one response only

- 7 – Excellent
- 6
- 5
- 4
- 3
- 2
- 1 – Very poor

Demographic Profile

The final few questions are for statistical calculations. Please be assured all information will be kept completely confidential.

20. What type of residence do you currently live in?

Please select one response only

- Detached house
- Duplex, Triplex, or Fourplex
- Townhouse or rowhouse
- Multi-residence building (apartment or condominium)
- Mobile home
- Other (Please specify)
- Prefer not to answer

21. Do you own or rent your residence?

Please select one response only

- Own
- Rent
- Other (Please specify)
- Prefer not to answer

22. Is your residence served by curbside recycling or a blue box/blue cart program?

Please select one response only

- Yes
- No
- Don't know

[ASK Q23 IF NO OR DK TO Q22 AND LIVE IN A TOWNHOUSE OR ROW HOUSE, MULTI-RESIDENCE BUILDING OR MOBILE HOME IN Q20]

23. Does your residence have any facilities or programs for beverage container recycling?

Please select one response only

- Yes
- No
- Don't know

24. If you work outside the home, does your workplace have beverage container recycling?

Please select one response only

- Yes – my workplace has beverage container recycling
- No – my workplace does not have beverage container recycling
- I don't work outside the home
- Don't know/prefer not to answer

25. Do you own or have access to a vehicle?

Please select one response only

- Yes – Own a vehicle
- Yes – Have access to a vehicle (but do not own)
- No
- Prefer not to answer

26. Including yourself, how many people live in your household?

Please select one response only

- DROP-DOWN BOX [RANGE: 1 to 20]
- Prefer not to answer [BELOW DROP-DOWN BOX]

[ASK Q27 IF TWO OR MORE IN Q26]

27. How many children in each of the following age groups live in your household?

Please select one response for each item

- Under the age of 6 [DROP-DOWN BOX. RANGE: 0 TO 10]
- Between the ages of 6 and 17 [DROP-DOWN BOX. RANGE: 0 TO 10]
- Prefer not to answer [BELOW DROP-DOWN BOXES]

28. For how many years have you lived in Alberta?

Please select one response only

Born and raised
More than 20 years
11 to 20 years
6 to 10 years
3 to 5 years
1 or 2 years
Less than one year
Prefer not to answer

29. Which of the following categories best describes the total annual income for all members of your household, before taxes?

Please select one response only

Less than \$20,000
\$20,000 to less than \$40,000
\$40,000 to less than \$60,000
\$60,000 to less than \$80,000
\$80,000 to less than \$100,000
\$100,000 to less than \$120,000
\$120,000 and over
Prefer not to answer

Thank you very much for participating in this survey!