



Ipsos Reid



Beverage Container Recycling – A Survey of Albertans 2012

Draft Report

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TABLE OF CONTENTS

SUMMARY OF KEY FINDINGS.....	1
BACKGROUND AND METHODOLOGY	7
BACKGROUND AND OBJECTIVES	7
METHODOLOGY	7
RESULTS REPORTING	8
GENERAL ATTITUDES.....	9
PERSONAL PERFORMANCE	9
PERCEIVED IMPACT OF ENVIRONMENTAL BEHAVIOURS	10
BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS.....	11
PAST SIX MONTHS PURCHASE OF BEVERAGE CONTAINERS	11
AWARENESS OF REFUNDABLE BEVERAGE CONTAINERS	12
INCIDENCE OF BEVERAGE CONTAINER RECYCLING AND REDEMPTION BY TYPE OF CONTAINER	14
OVERALL INCIDENCE OF BEVERAGE CONTAINER RECYCLING AND REDEMPTION	16
FREQUENCY OF RECYCLING OR RETURNING MILK CONTAINERS FOR A REFUND.....	17
AWARENESS OF REFUNDABLE DEPOSIT FOR BEVERAGE CONTAINERS.....	19
PERCEIVED IMPACT OF KNOWING THE REFUNDABLE DEPOSIT FOR BEVERAGE CONTAINERS.....	20
RECALL OF INFORMATION ABOUT REFUNDABLE DEPOSITS	21
MEANS OF INCREASING PUBLIC AWARENESS ABOUT REFUNDABLE BEVERAGE CONTAINERS	22
BOTTLE DEPOTS	23
FREQUENCY OF VISITATION	23
REASONS FOR NOT RETURNING BEVERAGE CONTAINERS TO DEPOTS OR NOT RETURNING MORE OFTEN	24
TRAVEL TIME TO BOTTLE DEPOTS.....	25
SUPPORT FOR A NEW DEPOT IN OWN COMMUNITY	26
IMPORTANCE OF BOTTLE DEPOT ATTRIBUTES.....	28
SATISFACTION WITH BOTTLE DEPOT ATTRIBUTES	29
ACTION GRID ANALYSIS	31
THE OVERALL RETURN RATE.....	33
OPPORTUNITIES FOR INCREASING THE OVERALL RETURN RATE FOR BEVERAGE CONTAINERS.....	33
AWARENESS OF THE OVERALL RETURN RATE FOR BEVERAGE CONTAINERS	34
RESPONDENT CHARACTERISTICS	35
APPENDIX A: SURVEY QUESTIONNAIRE	

SUMMARY OF KEY FINDINGS

Ipsos Reid conducted a total of 1,006 online interviews with a representative sample of Albertans aged 18 and older. 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 juice cans (58%), foil juice pouches (51%) and bag-in-a-box wine or juice (43%). One should note that these are also among the least purchased beverage containers. That being said, *awareness that juice cans can be returned for a refund sees a significant 6 percentage point increase from two years ago (58% 2012 vs. 52% 2010).*

Almost three years after introducing a deposit fee for dairy containers, awareness that plastic milk jugs (91%) and mild cartons (84%) can be returned for a refund hold steady at above the eight-in-ten mark. However, comparatively fewer Albertans are aware that liquid cream cartons (71%), 'milk to go' containers (71%) or milk tetra paks (69%) can be returned for a refund, while less than half are aware of the refundable deposit on yogurt drinks (46%) and liquid meal replacements (35%). Though still low, *awareness that liquid meal replacement containers can be returned for a refund is up significantly from 30% in 2010 to 35% in 2012.*

Recycling and Redemption of Beverage Containers

Reported recycling of beverage containers in the past six months is near universal (97%), while redemption is 88%.

Among Albertans who have purchased each type of beverage container, reported incidence of recycling and/or redemption tops the 90% mark for all categories except foil juice pouches (89%), bag-in-a-box wine or juice (88%), milk tetra packs (89%), liquid meal replacements (83%) and single serve yogurt drinks (82%).

With regards to redemption, dairy containers continue to lag – still, significant gains are seen from two years ago with regards to *liquid cream containers (recycling and/or redemption is up 5*

percentage points from 87% to 92%) and 'milk to go' containers (redemption is up 9 percentage points from 69% to 78%).

Frequency of Recycling or Redeeming Milk Containers

Almost three-quarters (74%) of Albertans say they *always* recycle or return milk and cream containers, while just 4% say they never do. It is notable that 78% of households with curbside recycling say they *always* recycle or return milk and cream containers versus 69% 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 (22%), inconvenience (18%) and simply forgetting (14%).

Awareness of the Refundable Deposit for Beverage Containers

Awareness of the refundable deposit for beverage containers more than one litre in size is up significantly from two years ago.

More than half (55%) of Albertans know the refundable deposit for beverage containers that are one litre or less, while 43% (*up significantly from 38% in 2010*) know the deposit for beverage containers more than one litre in size.

Knowing the correct deposit value would have a positive impact on redemption for roughly four-in-ten Albertans currently unaware. Among those unable to cite the refundable deposit value for containers one litre or less in size, 36% (*down significantly from 45% in 2010*) say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while six-in-ten (60%, *up from 53% in 2010*) say it would make no difference. When it comes to containers more than one litre in size, 42% (*down significantly from 49% in 2010*) say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 55% say it would make no difference.

Three-in-ten (28%) Albertans say they have seen information at retail stores that identifies the refundable deposit on beverage containers. One quarter (24%) at grocery stores, 13% at a liquor store, 7% at a convenience store and 4% at a gas station. Cash register receipts (66%) are by far the most common channel.

While Albertans think **putting the refundable deposit value on the container** itself (72% 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 – 22% ‘donate to charity’, 21% ‘leave them for bottle collectors’, 21% ‘put into blue box’ and 7% ‘use the building recycling program’. Other reasons given include ‘too much trouble’ (12%), no room to store them (11%) and ‘too time consuming’ (6%). Issues with bottle depots themselves are limited – 8% say the ‘depot is too far away’ and 2% 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’ (73%).

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** (77% very important – i.e. rating of 6 or 7 on a 7-point scale). In the next tier are convenience of the location (55%, *down 6 percentage points from 2010*), waiting time (50%), customer service (47%) and safety of the depot location (42%), while **cleanliness (31%) and overall appearance (26%) of the depot are the least important factors**.

Satisfaction with most aspects of bottle depots is very high. The majority of Albertans are very satisfied (i.e. 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 area in which the depot is located (58%), waiting time (55%) and customer service (55%). Comparatively lower is satisfaction with the overall appearance (36% very satisfied) and cleanliness (35% very satisfied) of the depot. Findings are consistent with 2010. In general, satisfaction tends to be *lower* among residents of Edmonton and *higher* among residents of Smaller Southern cities and the Rural South.

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 (24%), increasing the refundable deposit (18%) and improving various aspects of bottle depots (15%)**.

Younger Albertans

Research findings suggest that younger Albertans aged 18 to 34 years tend to be more disengaged than their older counterparts.

- Significantly *fewer* (67%) Albertans aged 18 to 34 years think recycling empty beverage containers has a significant benefit to the environment compared to those aged 35 to 54 years (77%) and 55 years or older (83%). In fact, 'significant benefit to the environment' ratings are *lower* among younger Albertans compared to those aged 35 years or older for five of the seven activities assessed (the two exceptions being reducing water consumption and reducing car use).
- Awareness of a refundable deposit for glass soft drink bottles, juice cans and liquid cream cartons is significantly *lower* among younger Albertans aged 18 to 34 years compared to their counterparts aged 35 years or older.
- Reported incidence of returning containers to a bottle depot is significantly *lower* among young Albertans aged 18 to 24 years (77%) compared to those aged 25 years or older (89%).
- Reported incidence of *always* recycling or returning milk and cream containers is significantly *higher* among Albertans aged 55 years or older (82%) and 35 to 54 years (77%) compared to younger residents aged 25 to 34 years (66%) and 18 to 24 years (53%).
- Awareness of the deposit for beverage containers that are one litre or less in size is significantly *lower* among younger Albertans aged 18 to 24 years (39%) compared to their counterparts aged 25 years or older (56%).
- Satisfaction with all aspects of bottle depots – with the exception of getting the refundable deposit back – is *lowest* among younger Albertans aged 18 to 34 years.

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 of empty beverage containers that can be returned for a deposit tends to be *lowest* among past five years newcomers to Alberta – this holds for the majority of container types.
- Though still quite high, incidence of recycling and/or redemption is significantly *lower* among past 5 years newcomers to Alberta (89%) compared to longer term residents (98%).
- Fourteen percent of past five years newcomers to Alberta say their household *never* returns beverage containers to a bottle depot.
- Two-thirds (65%) of past five years newcomers to Alberta say knowing that the refundable deposit for all beverage containers more than one litre in size is 25 cents would make them more likely to return containers to a bottle depot, significantly *higher* than longer term residents (40%).

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 83% in 2010 from 82% in 2009 and 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 research 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.

The *Beverage Container Recycling: A Survey of Albertans* was conducted in 2007, 2009, 2010 and again in 2012. Key research objectives of the 2012 survey 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;
- Possible ways to increase Albertan's recycling; and,
- Changes in knowledge, attitudes and behaviours from 2010.

Methodology

Between February 27th and March 6th, 2012, Ipsos Reid conducted a total of 1,006 online interviews with a representative sample of Albertans aged 18 years and older. 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 final 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.

With a sample of 1,006, results are considered accurate to within ± 3.1 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.

The following table details the number of interviews conducted within each region as well as the corresponding margins of error.

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%	234	23.3%	$\pm 6.5\%$
City of Calgary	793,490	31.6%	276	27.4%	$\pm 5.9\%$
Smaller Cities North ¹	302,355	12.0%	119	11.8%	$\pm 9.0\%$
Smaller Cities South ²	288,280	11.5%	129	12.8%	$\pm 8.7\%$
Rural North	296,620	11.8%	122	12.1%	$\pm 8.9\%$
Rural South	253,325	10.1%	126	12.5%	$\pm 8.8\%$
TOTAL	2,514,960	100%	1,006	100%	$\pm 3.1\%$
¹ Smaller Cities North: Camrose, Cold Lake, Fort McMurray, Fort Saskatchewan, Grande Prairie, Leduc, Lloydminster, Sherwood Park, Spruce Grove, St. Albert, Stony Plain and Wetaskiwin ² Smaller 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, 66% completed the survey, 6% dropped out part way through and 26% 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 year-to-year and by socio-demographic variables (e.g. region, gender and age) – are highlighted throughout the report.

GENERAL ATTITUDES

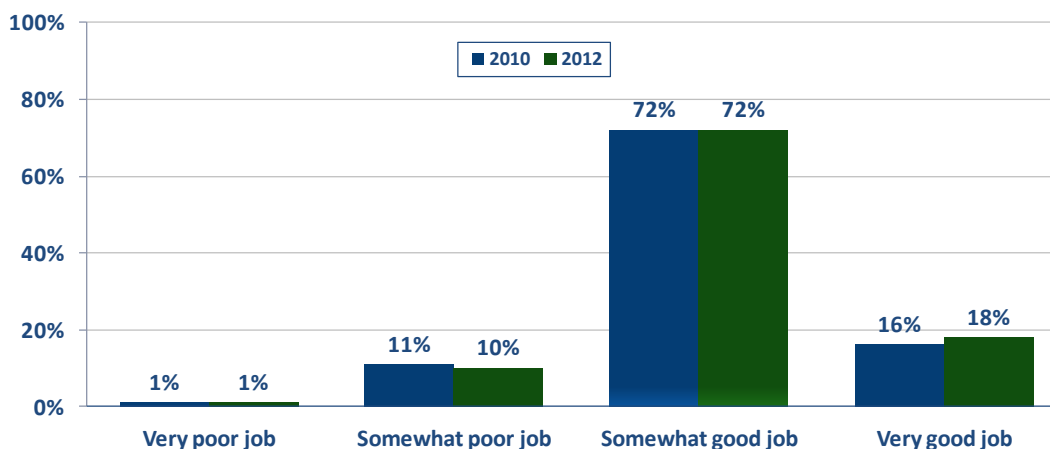
Personal Performance

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. Findings are consistent with 2010.

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, 2012 n=1,006 / 2010 n=1,206)



Personal performance ratings are significantly lower among Albertans under the age of 35 (83% good job) compared to their counterparts aged 35 years or older (93% good job).

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 (97%) or good job (98%) than those who say they do a poor job (93%), and reported incidence of always recycling/returning milk containers increases significantly with perceived personal performance – from 58% among those who say they do a poor job, to 74% among those who say they do a somewhat good job to 82% among those who say they do a very good job. Further, awareness that milk jugs and liquid cream cartons can be returned for a refund is also significantly higher among those who say they do a very good job.

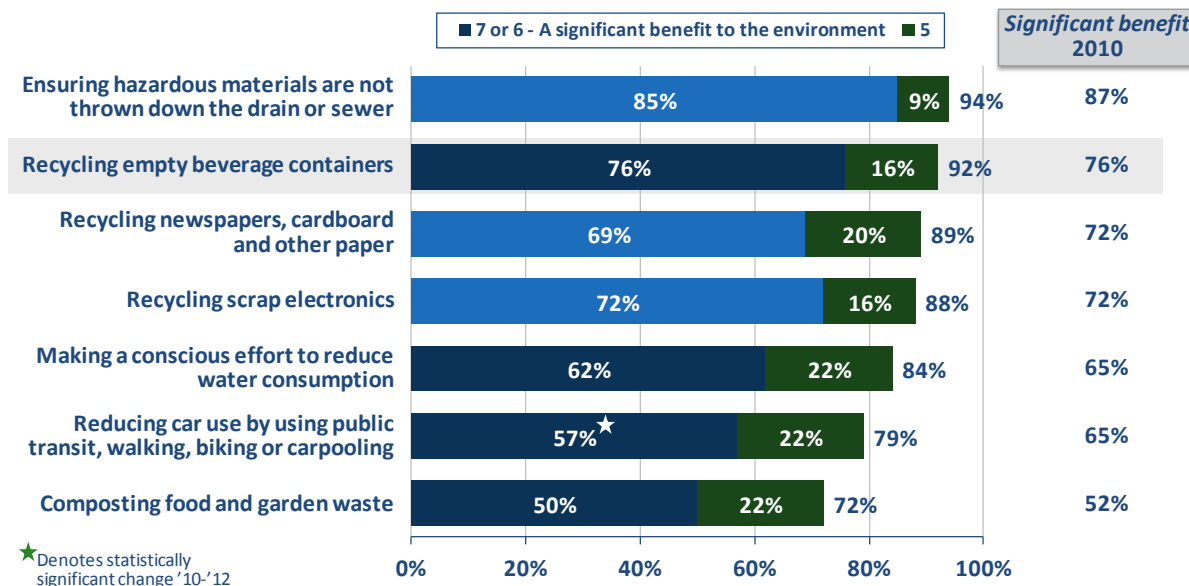
Perceived Impact of Environmental Behaviours

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 (85%), but ahead of recycling scrap electronics (72%) and recycling newspapers, cardboard and other paper (69%). It is interesting that the percentage of Albertans who say *reducing car use has a significant benefit (57%) is down 8 percentage points from 2010 (65%)*.

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, 2012 n=1,006 / 2010 n=1,206)



When the data are analyzed by age, significantly *fewer* Albertans aged 18 to 34 years think recycling empty beverage containers has a significant benefit to the environment (67%) compared to adults aged 35 to 54 (77%) and 55 or older (83%). In fact, 'significant benefit to the environment' ratings are *lower* among younger Albertans compared to those aged 35 years or older for five of the seven activities assessed (the two exceptions being reducing water consumption and reducing car use).

BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS

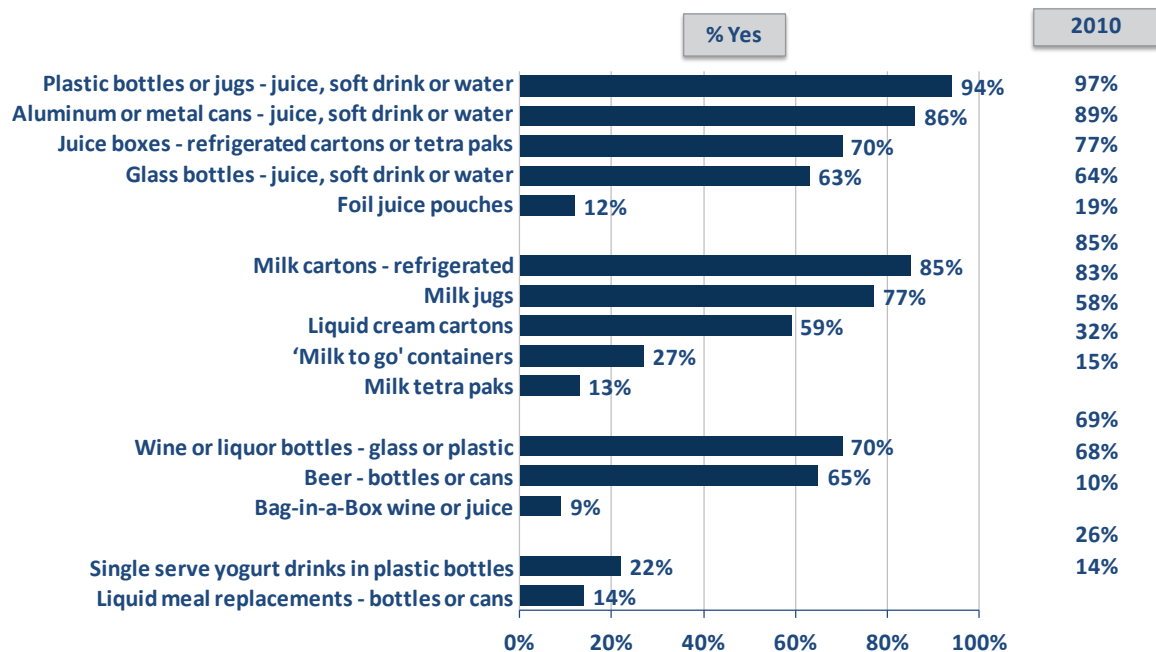
Past Six Months Purchase of Beverage Containers

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, single serve yogurt drinks, liquid meal replacements, foil juice pouches and bag-in-a-box wine or juice, is markedly lower than other types of beverage containers. The same pattern held true in 2010.

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, 2012 n=1,006 / 2010 n=1,206)



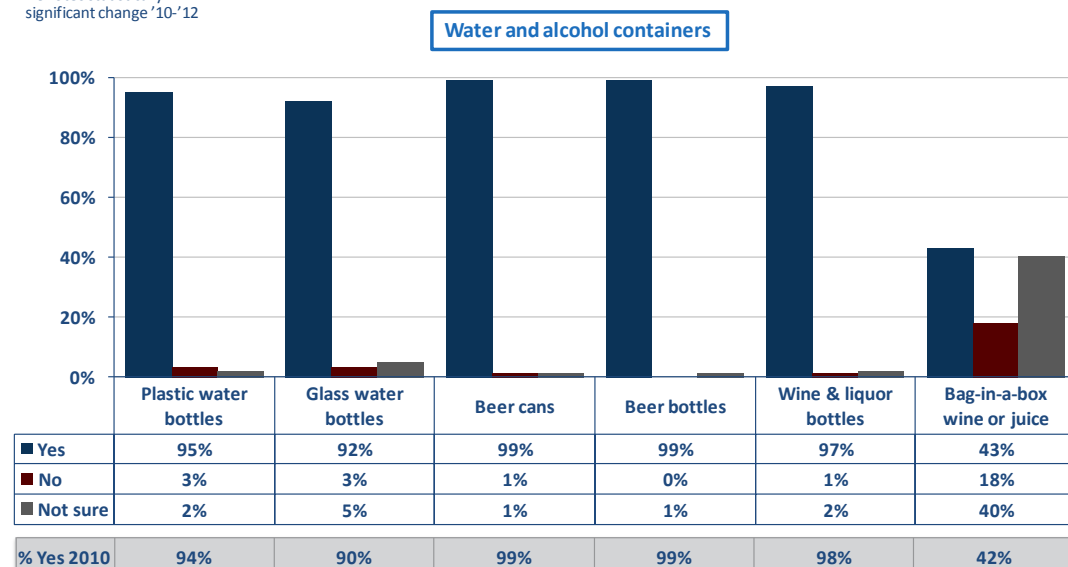
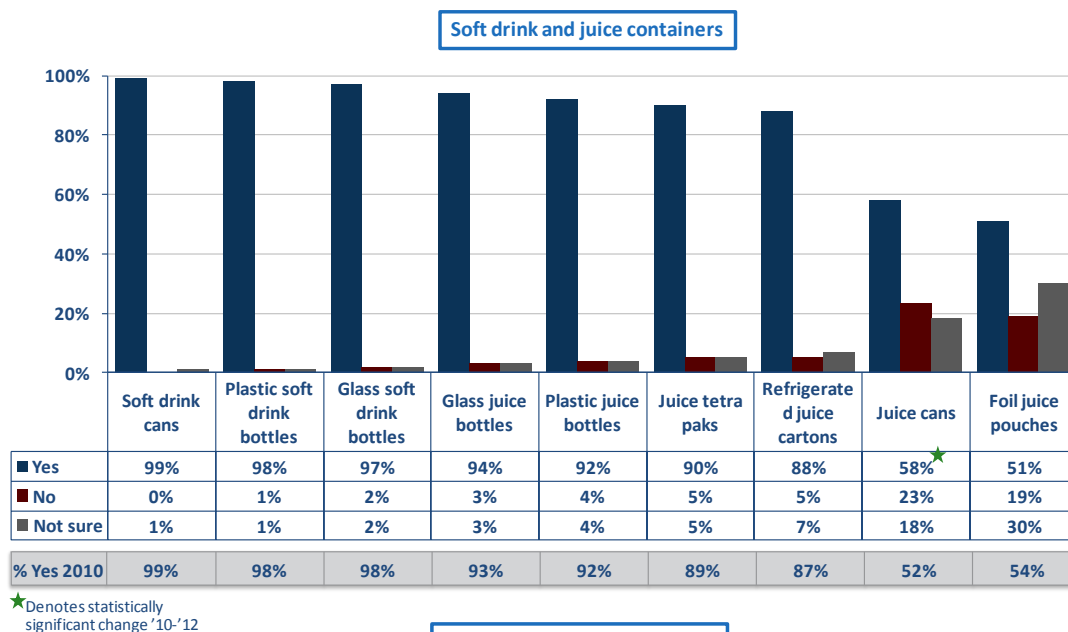
Awareness of Refundable Beverage Containers

Awareness that juice cans and liquid meal replacement containers can be returned for a refund is up significantly from 2010.

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 juice cans, foil juice pouches and bag-in-a-box wine or juice. One should note that these are also among the least purchased beverage containers. That being said, *awareness that juice cans can be returned for a refund sees a significant 6 percentage point increase from two years ago (58% 2012 vs. 52% 2010).*

What can be returned for a refund?

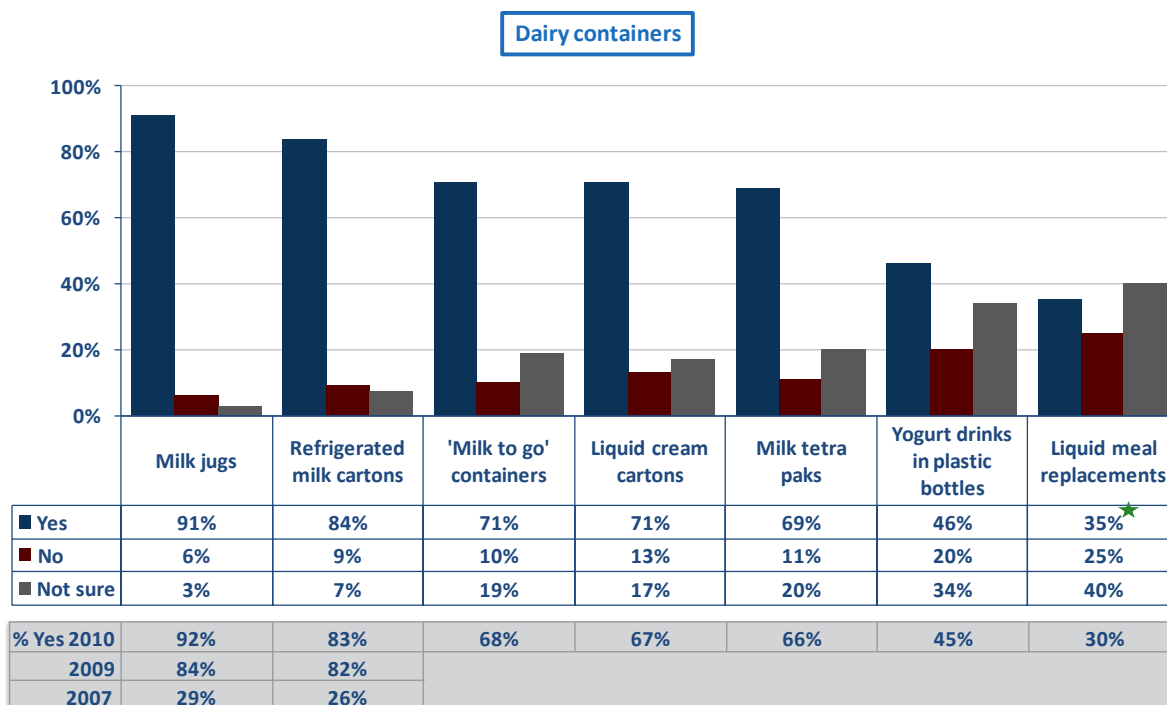
Q3. To the best of your knowledge, please indicate if each of the following types of beverage containers can be returned to a bottle depot for a refund? (Base: All respondents, 2012 n=1,006 / 2010 n=1,206)



Almost three years after introducing a deposit fee for dairy containers, awareness that plastic milk jugs (91%) and mild cartons (84%) can be returned for a refund hold steady at above the eight-in-ten mark. However, comparatively fewer Albertans are aware that liquid cream cartons (71%), 'milk to go' containers (71%) or milk tetra paks (69%) can be returned for a refund, while less than half are aware of the refundable deposit on yogurt drinks (46%) and liquid meal replacements (35%). Though still low, awareness that liquid meal replacement containers can be returned for a refund is up significantly from 30% in 2010 to 35% in 2012.

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, 2012 n=1,006 / 2010 n=1,206)



★ Denotes statistically significant change '10-'12

It is notable that awareness of a refundable deposit for glass soft drink bottles, juice cans and liquid cream cartons is significantly *lower* among younger Albertans aged 18 to 34 years compared to their counterparts aged 35 years or older.

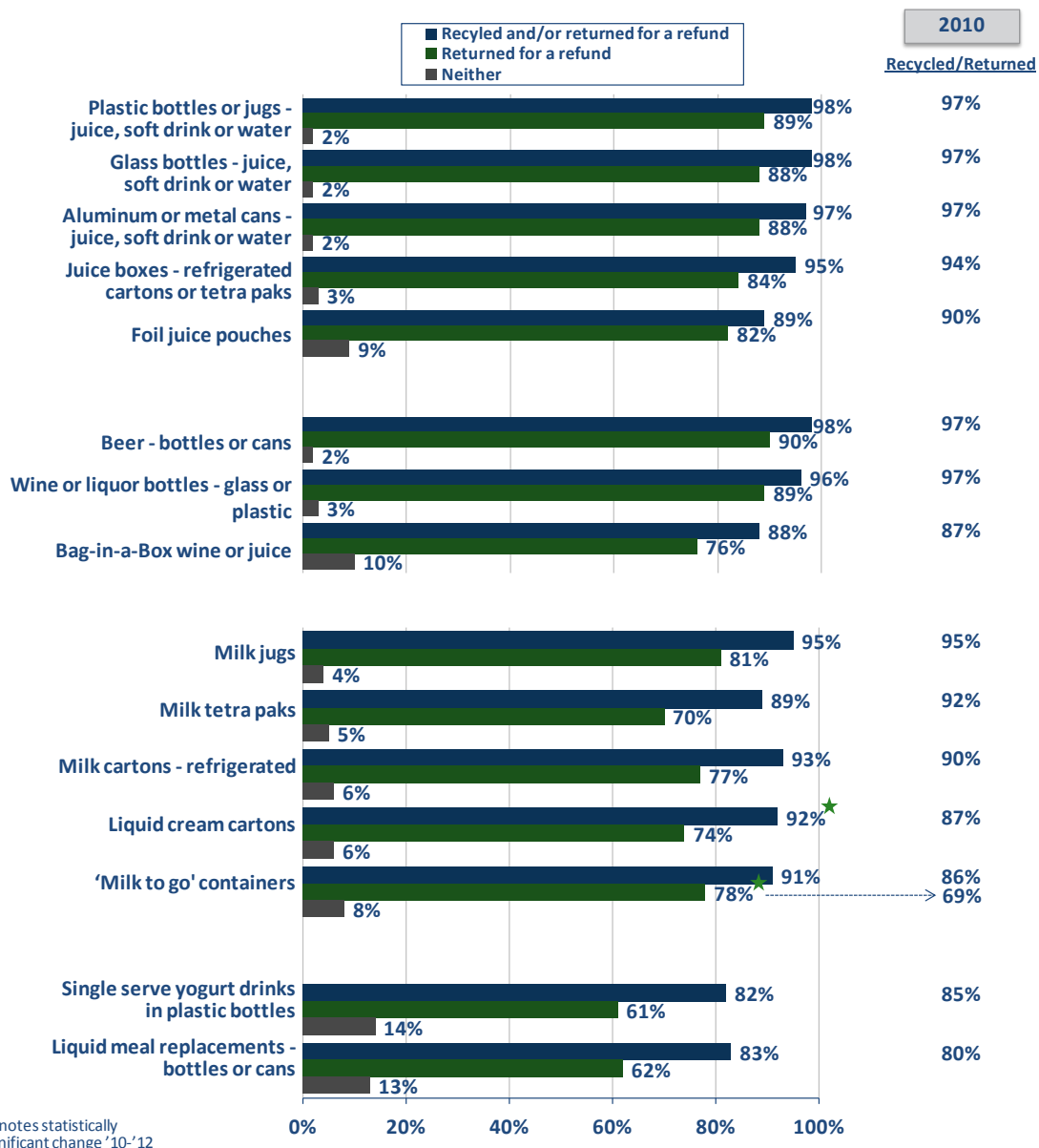
Considering tenure in Alberta, it is noteworthy that awareness of beverage containers that can be returned for a deposit tends to be *lowest* among past five years newcomers to Alberta (this holds for the majority of container types).

Incidence of Beverage Container Recycling and Redemption by Type of Container

Among Albertans who have purchased each type of beverage container, reported incidence of recycling and/or redemption is 80% or higher for all categories. With regards to redemption, dairy containers continue to lag – still, *significant gains are seen from two years ago with regards to liquid cream containers (recycling and/or redemption is up 5 percentage points) and 'milk to go' containers (redemption is up 9 percentage points).*

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)



Container types that less than eight-in-ten purchasers report returning to a bottle depot are bag-in-a box wine or juice (76%), 'milk to go' containers (78%), milk cartons (77%), liquid cream cartons (74%), milk tetra paks (70%), liquid meal replacements (62%) and yogurt drinks (61%).

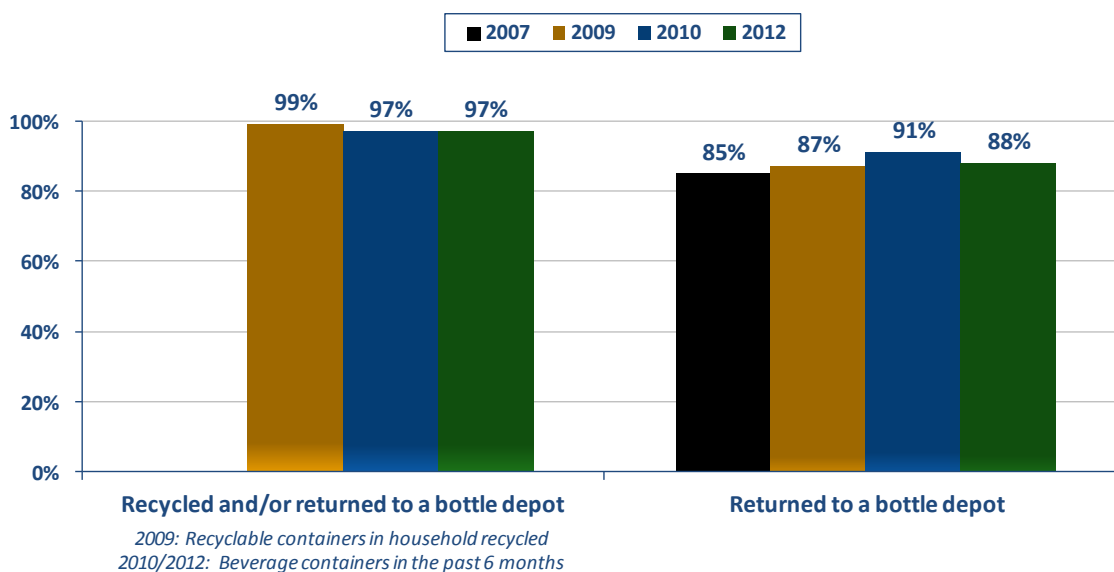
It is notable that recycling and/or redemption is significantly *higher* among Albertans who have curbside recycling than those who do not for liquid cream cartons (95% vs. 89%) and 'milk to go' containers (95% vs. 86%). Also recycling and/or redemption of beverage containers tends to be *lower* among past five years newcomers to the province.

Overall Incidence of Beverage Container Recycling and Redemption

Reported recycling and/or redemption of beverage containers in the past six months remains near universal (97%) among Albertans, while roughly nine-in-ten (88%) indicate they have returned beverage containers to a bottle depot in the same time frame. Findings are consistent with 2010.

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

(Base: All respondents)



Though still quite high, incidence of recycling and/or redemption is significantly *lower* among past 5 years newcomers to Alberta (89%) compared to longer term residents (98%).

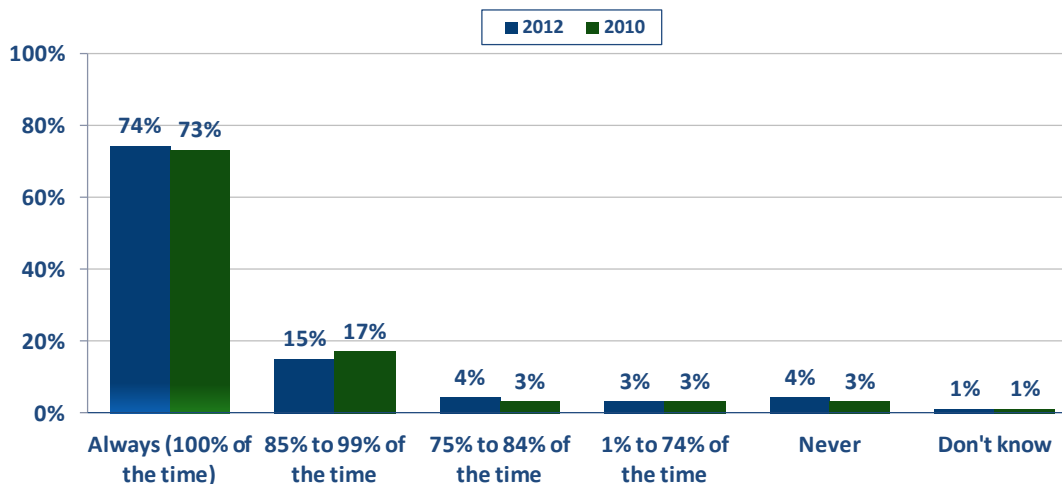
Reported incidence of returning containers to a bottle depot is significantly *higher* among residents of the rural south (97%) compared to their counterparts in other regions of Alberta, and significantly *lower* among young Albertans aged 18 to 24 years (77%) compared to those aged 25 years or older (89%).

Frequency of Recycling or Returning Milk Containers for a Refund

Almost three-quarters (74%) of Albertans say they *always* recycle or return milk and cream containers, while just 4% say they *never* do. Results are consistent with 2010.

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, 2012 n=977 / 2010 n=1,189)

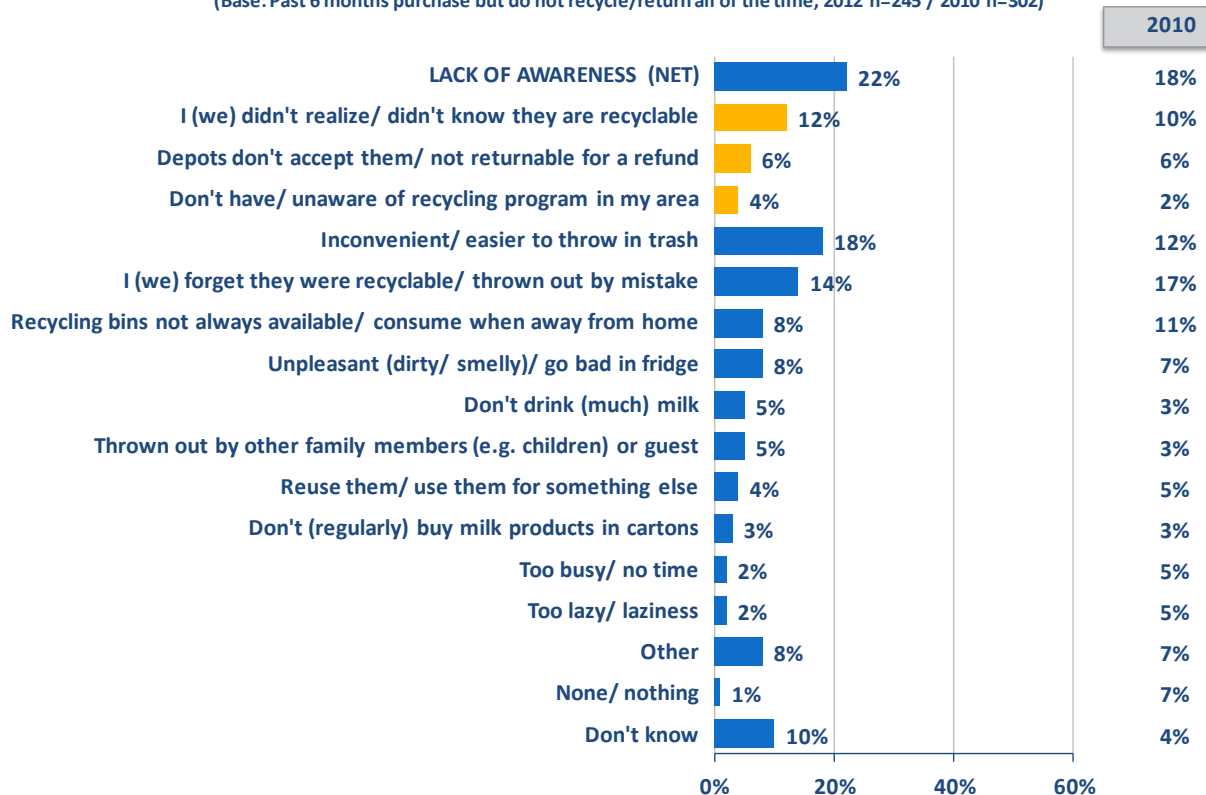


It is notable that 78% of households with curbside recycling say they *always* recycle or return milk and cream containers versus 69% of households that do not have curbside recycling. Reported incidence of *always* recycling or returning milk and cream containers is also significantly *higher* among Albertans aged 55 years or older (82%) and 35 to 54 years (77%) compared to younger residents aged 25 to 34 years (66%) and 18 to 24 years (53%).

The most frequent reasons given for not *always* recycling or returning milk and cream containers are lack of awareness (22%), inconvenience (18%) and simply forgetting (14%).

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, 2012 n=245 / 2010 n=302)



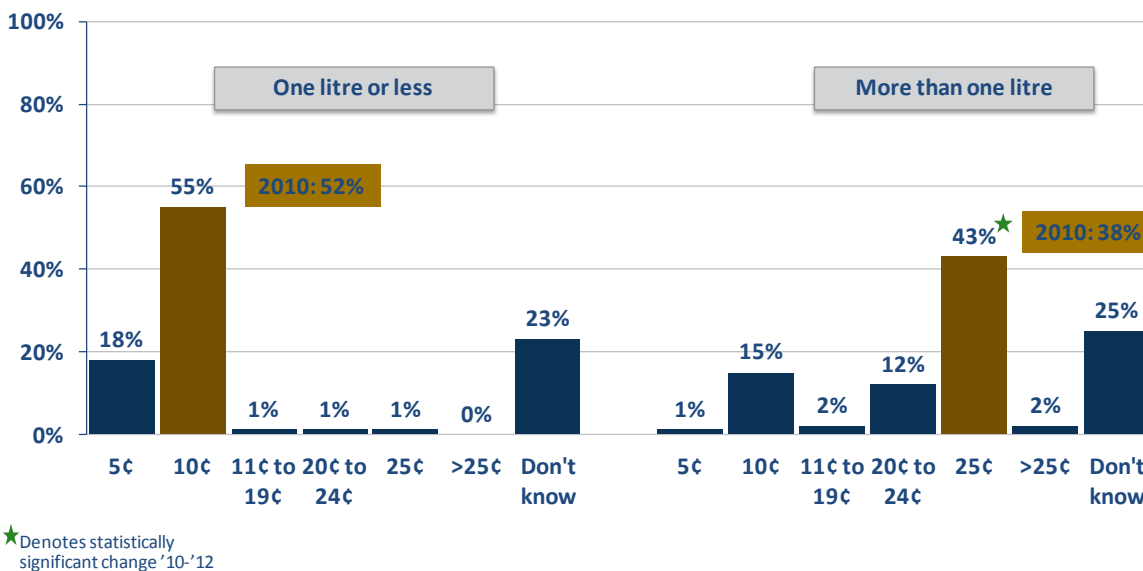
Awareness of Refundable Deposit for Beverage Containers

Awareness of the deposit for beverage containers more than one litre in size is up significantly from two years ago.

Fifty-five percent of Albertans correctly specify 10 cents as the refundable deposit on beverage containers that are one litre or less, while 18% 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 (43%) correctly say 25 cents, while 30% cite a refund of less than 25 cents and one-quarter (25%) 'don't know'. *That being said, awareness of the refundable deposit for containers more than one litre in size sees a significant 5 percentage point increase from 2010.*

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=1,006)



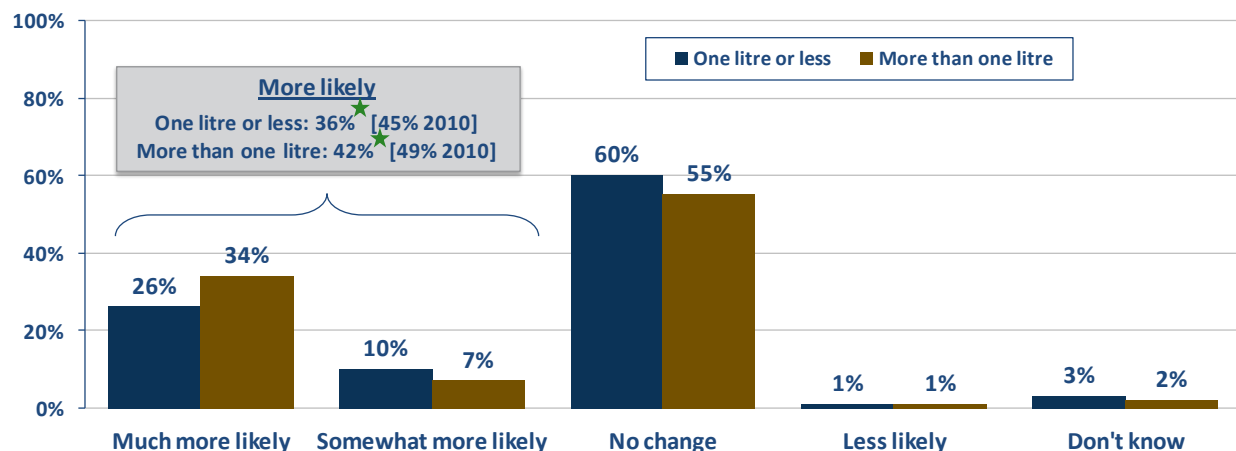
Awareness of the deposit for beverage containers that are one litre or less in size is significantly lower among younger Albertans aged 18 to 24 years (39%) compared to their counterparts aged 25 years or older (56%).

Perceived Impact of Knowing the Refundable Deposit for Beverage Containers

Knowing the correct deposit value would have a positive impact on redemption for roughly four-in-ten Albertans currently unaware. Among those unable to cite the refundable deposit value for containers one litre or less in size, 36% (*down significantly from 45% in 2010*) say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while six-in-ten (60%, *up from 53% in 2010*) say it would make no difference. When it comes to containers more than one litre in size, 42% (*down significantly from 49% in 2010*) say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 55% say it would make no difference.

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¢: 2012 n=455 / 2010 n=576, 25¢: 2012 n=582 / 2010 n=743)



★ Denotes statistically significant change '10-'12

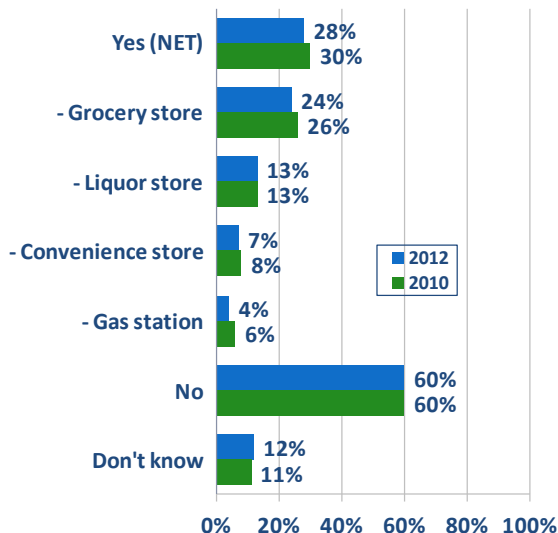
Two-thirds (65%) of past five years newcomers to Alberta say knowing that the refundable deposit for all beverage containers more than one litre in size is 25 cents would make them more likely to return containers to a bottle depot, significantly *higher* than longer term residents (40%).

Recall of Information about Refundable Deposits

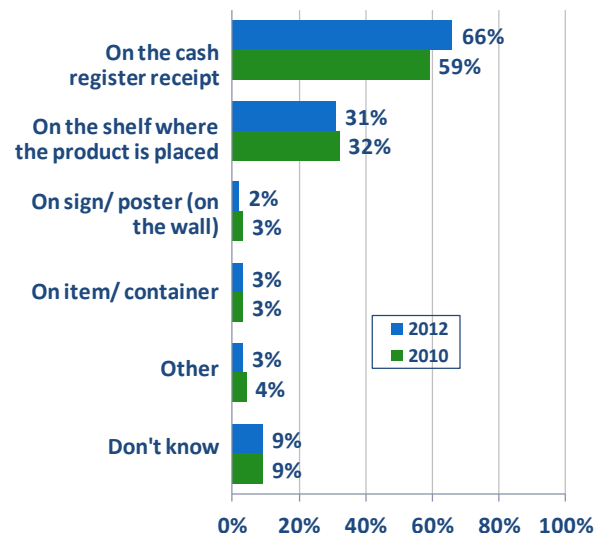
Three-in-ten (28%) Albertans say they have seen information at retail stores that identifies the refundable deposit on beverage containers. One quarter (24%) at grocery stores, 13% at a liquor store, 7% at a convenience store and 4% at a gas station. Cash register receipts (66%) are by far the most common channel, followed by the shelf where the product is placed (31%). Findings are consistent with 2010.

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, 2012 n=1,006 / 2010 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, 2012 n=272 / 2010 n=339)



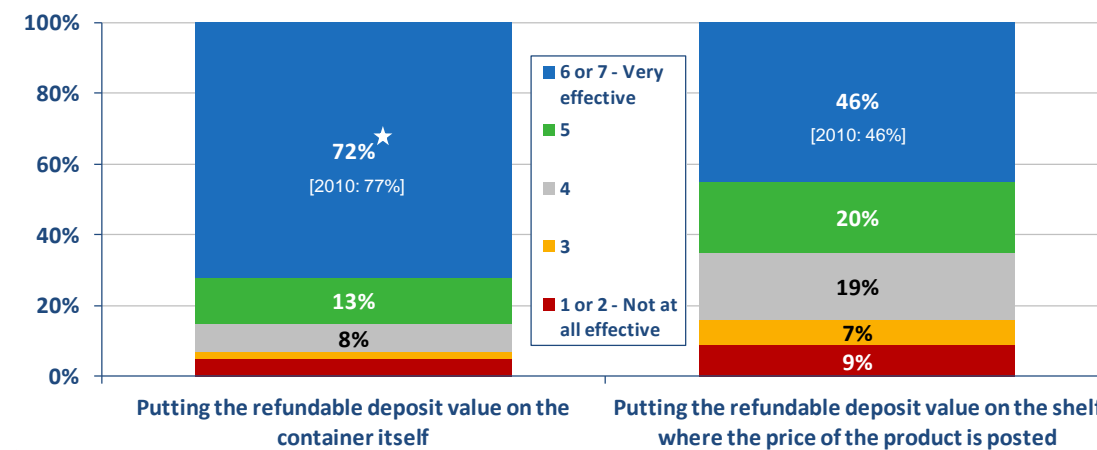
Recall of information about refundable deposits is significantly *lower* (19%) among residents of the Rural South.

Means of Increasing Public Awareness about Refundable Beverage Containers

While Albertans think putting the refundable deposit value on the container itself (72% 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. Though still very high, the percentage of Albertans who think *putting the refundable deposit on the container itself* would be very effective is down significantly from 77% in 2010.

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, 2012 n=1,006 / 2010 n=1,206)



★ Denotes statistically significant change '10-'12

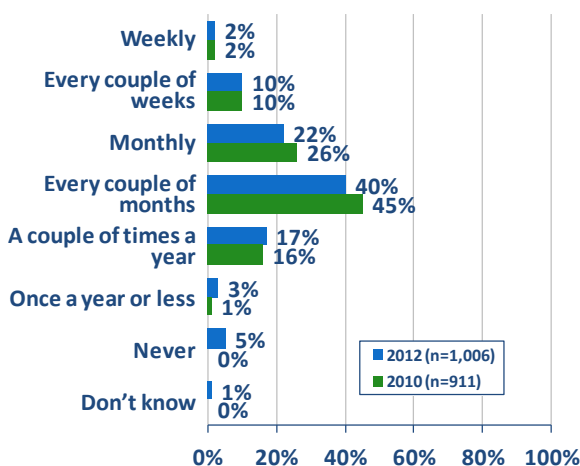
BOTTLE DEPOTS

Frequency of Visitation

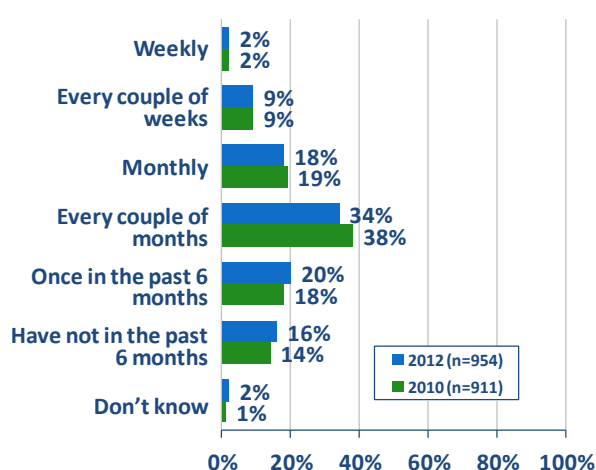
One-third (34%) of Albertans say their household returns containers to a bottle depot at least once a month, while another 40% make a trip every couple of months and 26% do so a couple of times a year or less. Further, 83% of Albertans whose households have returned items for a refund indicate they have personally visited a depot in the past six months. Frequency of visiting bottle depots is consistent with two years ago.

How often do you return containers to a bottle depot?

Q11. How often does your **household** return empty beverage containers to a bottle depot? (Base: 2012, All respondents / 2010, Have returned for refund)



Q13. Thinking about the past 6 months, approximately how often have you **personally** returned empty beverage containers to a bottle depot? (Base: Have returned for refund)



It is noteworthy that 14% of past five years newcomers to Alberta say their household *never* returns beverage containers to a bottle depot.

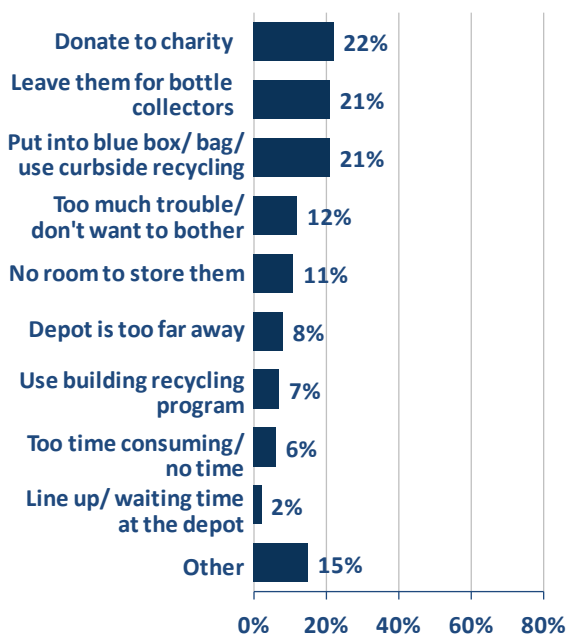
Reasons for Not Returning Beverage Containers to Depots or Not Returning More Often

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 – 22% ‘donate to charity’, 21% ‘leave them for bottle collectors’, 21% ‘put into blue box’ and 7% ‘use the building recycling program’. Other reasons given include ‘too much trouble’ (12%), no room to store them (11%) and ‘too time consuming’ (6%). Issues with bottle depots themselves are limited – 8% say the ‘depot is too far away’ and 2% point to the ‘line up or waiting time’.

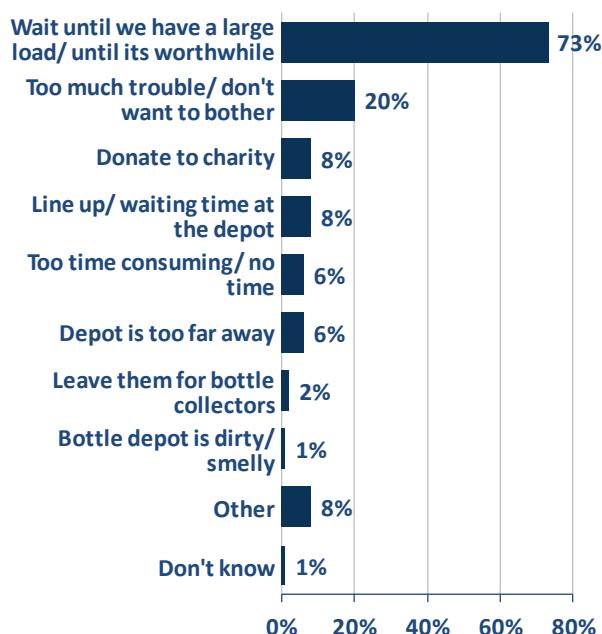
The predominant reason for visiting a bottle depot a couple of times a year or less is simply waiting ‘until we have a large load or until it’s worthwhile’ (73%).

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=52)



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=201)

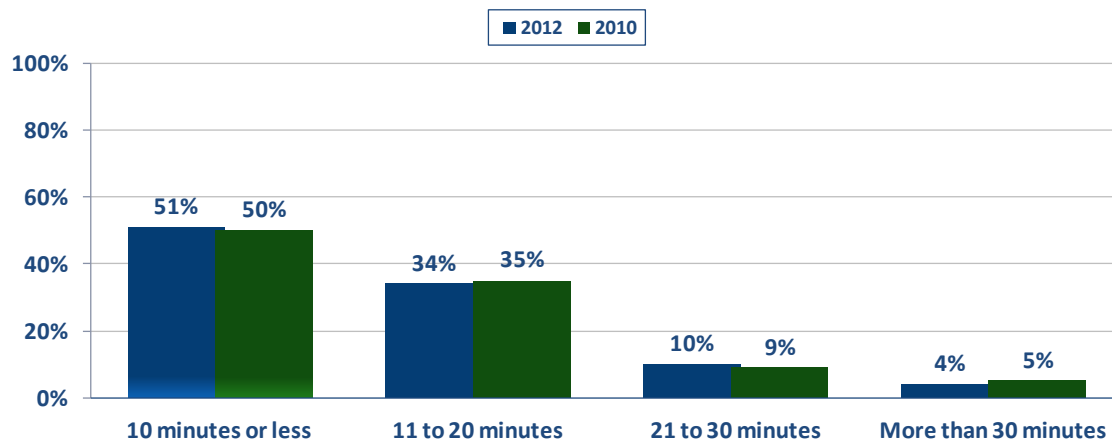


Travel Time to Bottle Depots

Half (51%) 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. As would be expected, Rural Albertans report longer travel times – 28% of residents of the Rural North and 32% of residents of the Rural South say it takes longer than 20 minutes.

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

Q16. On average, how long does it take you to get to the bottle depot you most often use? (Base: Personally returned to depot in past 6 months, 2012 n=772 / 2010 n=782)

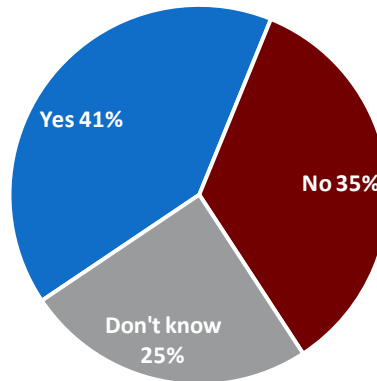


Support for a New Depot in Own Community

When asked if they would support the building of a new bottle depot closer to where they live, Albertans are divided, with 41% saying 'yes' and 35% saying 'no' (the remaining 25% 'don't know').

Support for a depot in own community or neighbourhood

Q16A. If it was possible to have a bottle depot closer to where you live - that is, in your community or neighbourhood - would you support the building of a new depot? (Base: All respondents n=1,006)

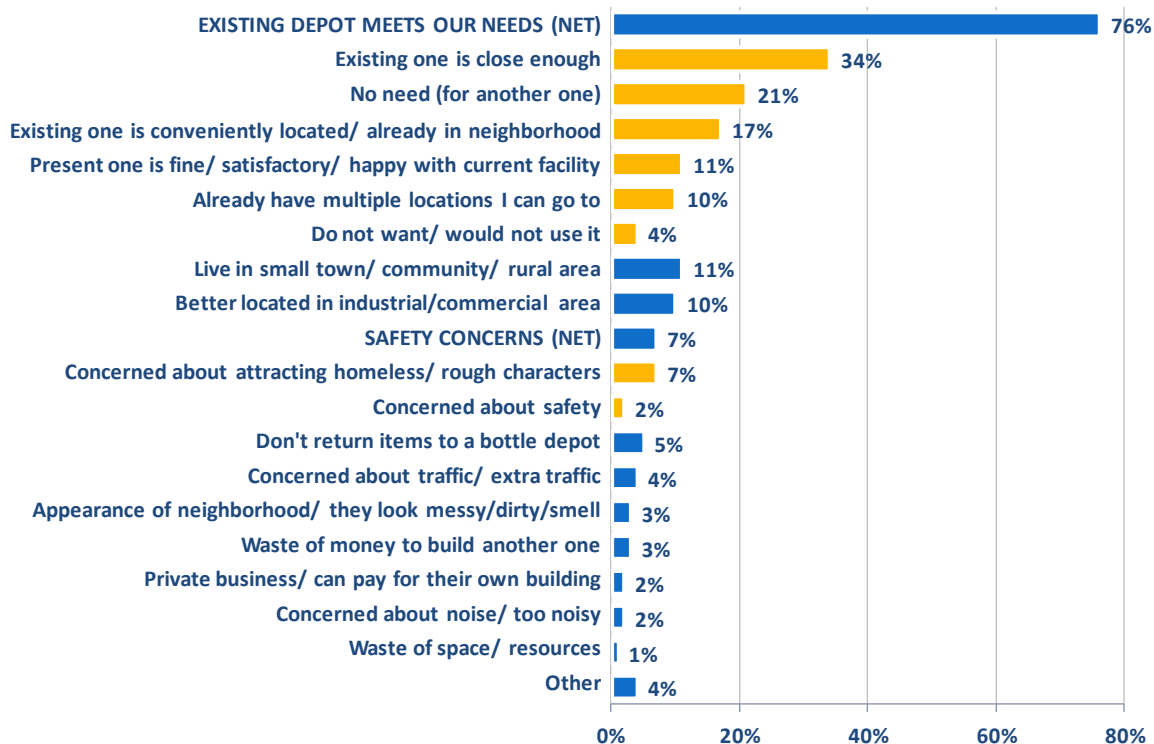


Regionally, more than half (56%) of Albertans living in Smaller cities in the South respond 'no', while the percentage who 'don't know' drops to 15%.

Among Albertans who said they would not support the building of a new bottle depot, the principal reason given was simply that the 'existing depot meets our needs' (76%). Top-of-mind, relatively few cite possible negative impacts on their community – safety concerns (7%), concerned about traffic (4%), appearance of neighbourhood (3%) and concerned about noise (2%).

Reasons for not supporting a new depot

Q16B. Why wouldn't you support the building of a new depot in your community or neighbourhood?
(Base: Would not a new depot, n=355)



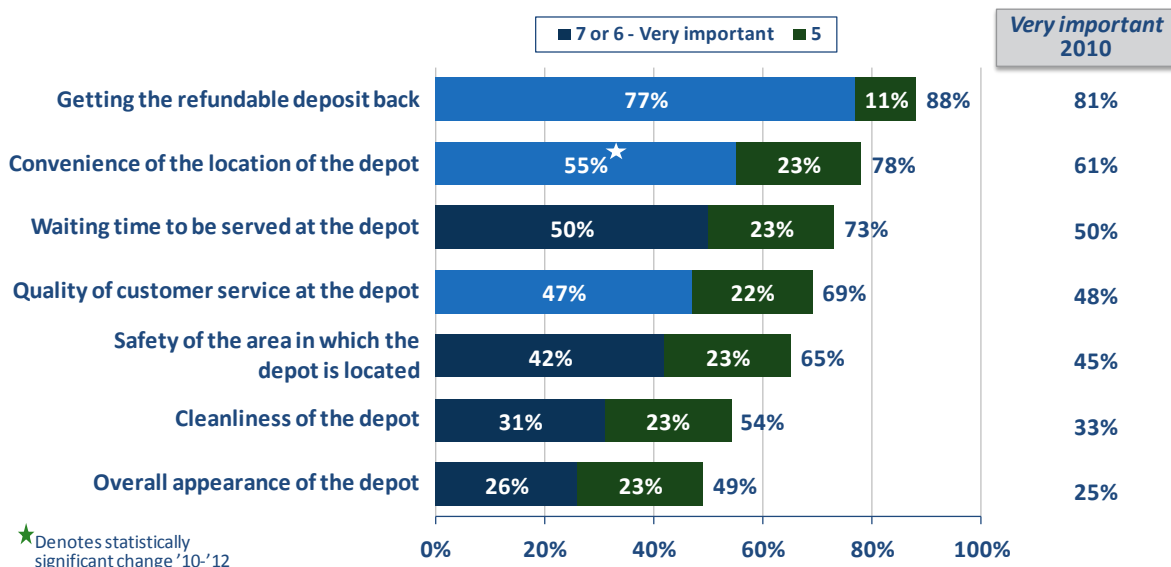
It is noteworthy that mentions of safety concerns are significantly *higher* among residents of Edmonton (14%) than their counterparts in Calgary (5%) and in Smaller cities and the Rural South (both 0%).

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 (77% very important – i.e. a rating of 7 or 6 on a 7-point scale). In the next tier are convenience of the location (55%, *down 6 percentage points from 2010*), waiting time (50% very important), customer service (47% very important) and safety of the depot location (42%), while cleanliness (31%) and overall appearance (26%) 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, 2012 n=772 / 2010 n=782)

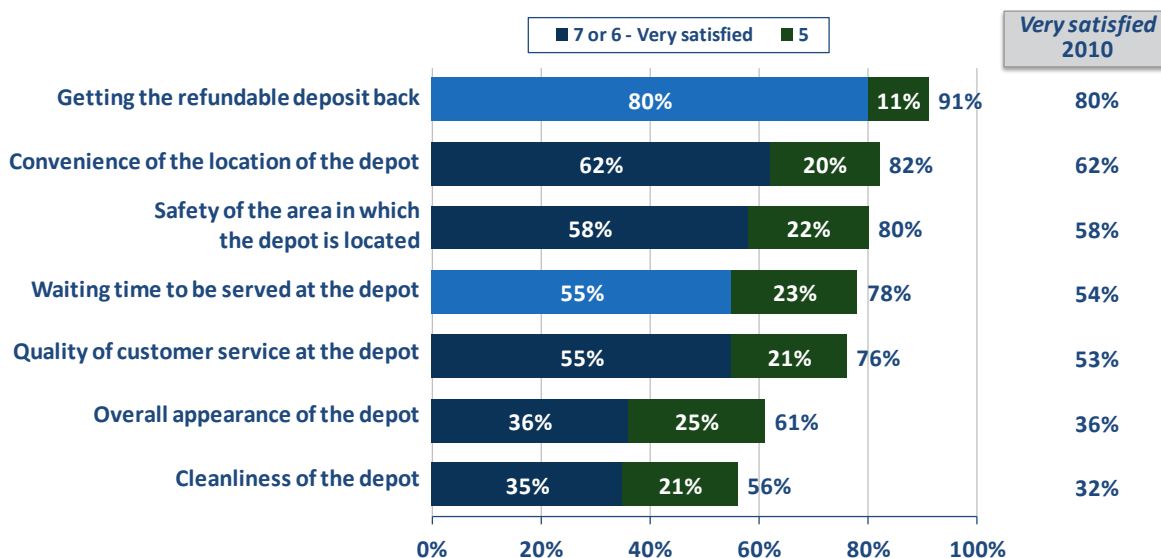


Satisfaction with Bottle Depot Attributes

Satisfaction with most aspects of bottle depots is very high. The majority of Albertans are very satisfied (i.e. a rating of 7 or 6 on a 7-point scale) with getting the refundable deposit back (80%), convenience of the location (62%), safety of area in which the depot is located (58%), waiting time (55%) and customer service (55%). Comparatively lower is satisfaction with the overall appearance (36% very satisfied) and cleanliness (35% very satisfied) of the depot. Findings are consistent with 2010.

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, 2012 n=772 / 2010 n=782)

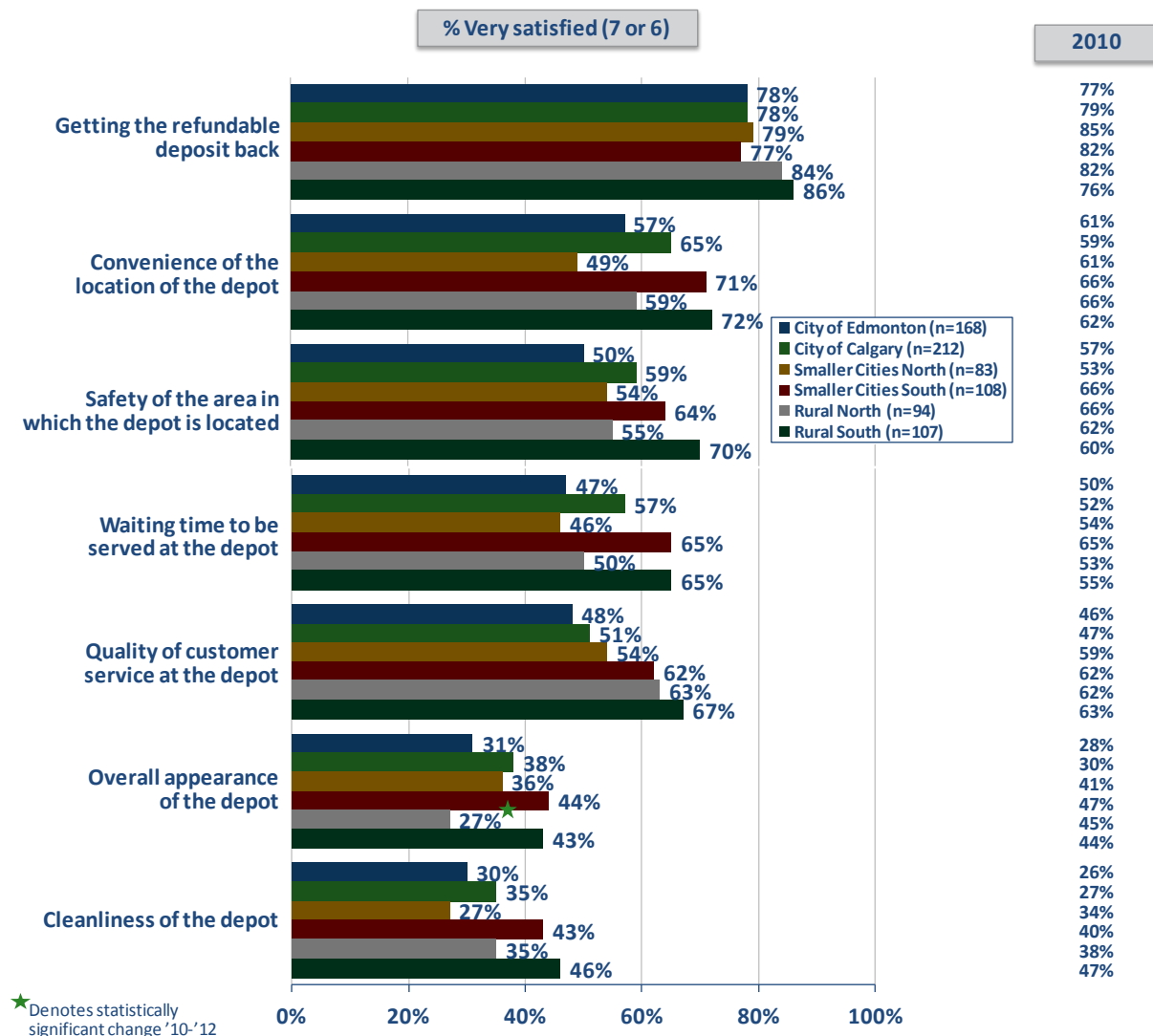


It is notable that satisfaction with all aspects of bottle depots – with the exception of getting the refundable deposit back – is lowest among younger Albertans aged 18 to 34 years. Further, satisfaction with the waiting time to be served *decreases* significantly with age (55 years or older – 64% very satisfied vs. 35 to 54 years – 55% vs. 18 to 34 years – 46%).

When the data are analyzed further, a number of significant regional differences emerge. In general, satisfaction tends to be *lower* among residents of Edmonton and *higher* among residents of Smaller Southern cities and the Rural South.

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, 2012 n=772 / 2010 n=782)



Considering very satisfied ratings:

- Satisfaction with the convenience of the location of the depot is significantly *lower* among residents of Smaller Northern cities (49%) than those living in Calgary (65%), Smaller

- Southern cities (71%) and the Rural South (72%). Satisfaction is also *lower* among residents of Edmonton (57%) compared to those in Smaller Southern cities and the Rural South.
- Satisfaction with the safety of the area in which the depot is located is significantly *higher* among residents of the Rural South (70%) and Smaller Southern cities (64%) compared to their counterparts in Edmonton (50%).
 - Satisfaction with the waiting time to be served is significantly *higher* among residents of Smaller Southern cities and the Rural South (both 65%) compared to residents of Edmonton (47%) and Smaller Northern cities (46%).
 - Satisfaction with customer service is significantly *lower* among residents of Edmonton (48%) versus their counterparts in Smaller Southern cities (62%), the Rural North (63%) and the Rural South (67%). Satisfaction is also lower among residents of Calgary (51%) compared to those in the Rural South.
 - Satisfaction with the overall appearance of the depot is significantly *higher* among residents of Smaller Southern cities (44%) and the Rural South (43%) compared to residents of Edmonton (31%) and the Rural North (27%). Further, satisfaction among residents of the Rural North is *down significantly from 2010* (45%).
 - Satisfaction with the cleanliness of the depot is significantly *lower* among residents of Edmonton (30%) compared to residents of Smaller Southern cities (43%) and the Rural South (46%).

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).

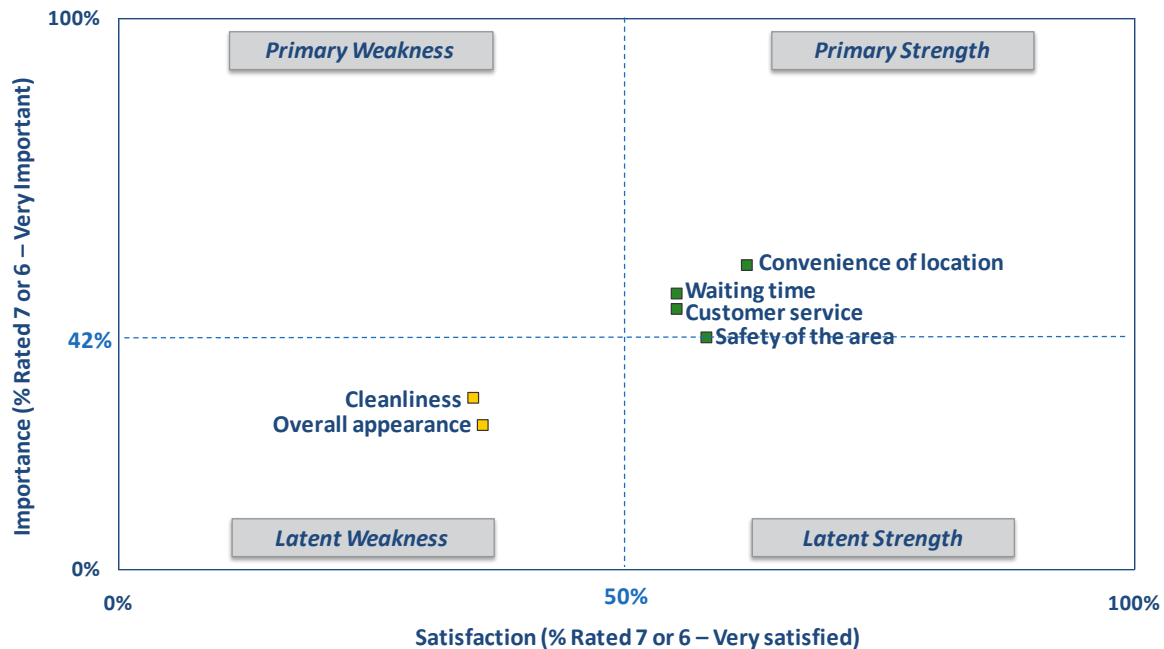
Attributes are located in one of four quadrants:

- 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, waiting time, customer service and safety of the area. 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.

Importance versus Satisfaction



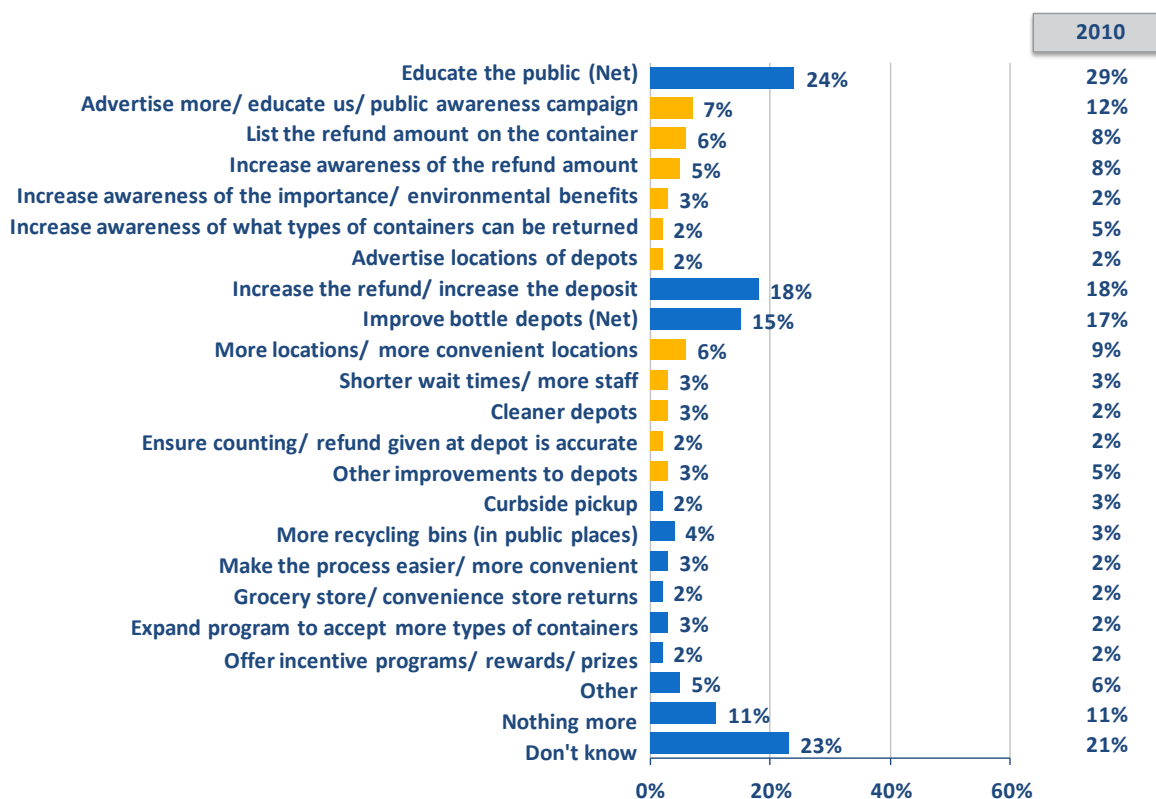
THE OVERALL RETURN RATE

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 (24%), increasing the refundable deposit (18%) and improving various aspects of bottle depots (15%).

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, 2012 n= 1,006 / 2010 n=1,206)



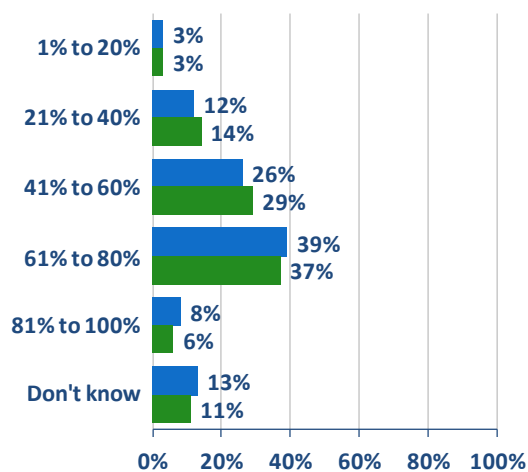
Awareness of the Overall Return Rate for Beverage Containers

As might be expected, Albertans are not knowledgeable about the overall rate of return for beverage containers. When asked, two-thirds (65%) guess in the 41% to 80% range, while just 8% say 81% or higher. Findings are unchanged from 2010.

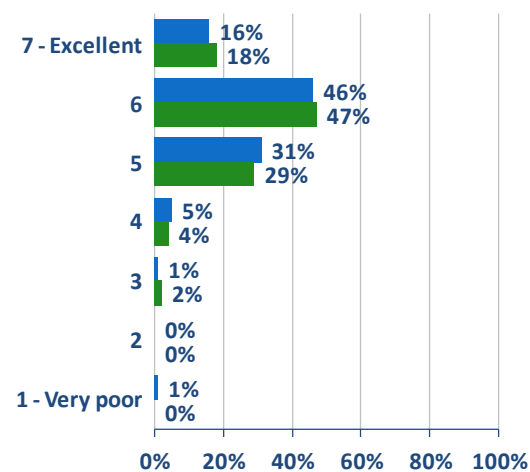
When told the actual return rate in 2010 was 83%, 62% deem it as being excellent (rating of 6 or 7), on par with 2010 (65%).

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, 2012 n=1,006 / 2010 n=1,206)



Q19. In 2010, the overall return rate for beverage containers in Alberta was 83%. Would you say this is...?
(Base: All respondents, 2012 n=1,006 / 2010 n=1,206)

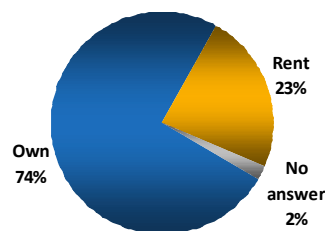


RESPONDENT CHARACTERISTICS

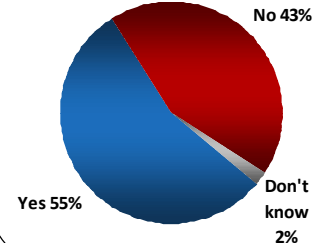
Type of Residence

Detached house	66%
Multi-residence building	12%
Townhouse or rowhouse	9%
Duplex, Triplex, or Fourplex	7%
Mobile home	4%
Prefer not to answer	1%

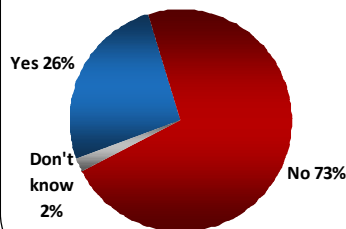
Own or Rent Residence



Curbside Recycling

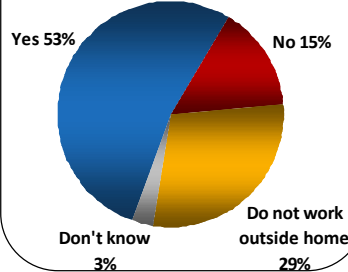


Facilities for Beverage Container Recycling

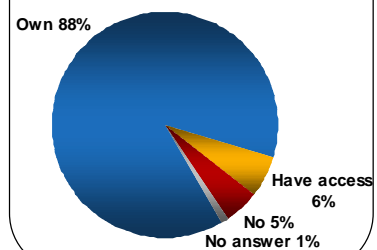


Base: Live in multi-residence building, townhouse or mobile home (n=201)

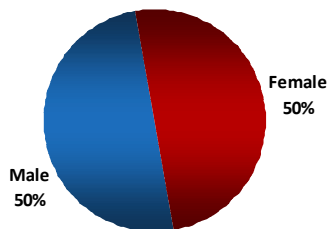
Beverage Container Recycling at Workplace



Own or Have Access to Vehicle



Gender



Age

18 to 24	9%
25 to 34	23%
35 to 54	41%
55 or older	27%
Mean	41

Tenure in Alberta

Born and raised	45%
More than 20 years	27%
11 to 20 years	12%
6 to 10 years	8%
3 to 5 years	5%
1 or 2 years	2%
Less than one year	2%

Household Size

1	15%
2	39%
3	19%
4 or more	26%
Prefer not to answer	2%

Number of Children Under 18 in Household

None	59%
1	20%
2	14%
3	3%
4 or more	2%

Household Income

Less than \$20K	3%
\$20K to less than \$40K	12%
\$40K to less than \$60K	15%
\$60K to less than \$80K	15%
\$80K to less than \$100K	14%
\$100K to less than \$120K	9%
\$120K and over	13%
Prefer not to answer	21%

APPENDIX A: SURVEY QUESTIONNAIRE

BEVERAGE CONTAINER MANAGEMENT BOARD
2012 ONLINE SURVEY
Final Questionnaire
February 22, 2012

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 only	Yes – Returned to a bottle depot for a refund only	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 only

Yes – Returned to a bottle depot for a refund only

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 [PROGRAMMER NOTE: RESPONDENT CAN ONLY SELECT IF 'YES-RECYCLED ONLY' OR 'YES – HAVE RECYCLED AND HAVE RETURNED FOR A REFUND' SELECTED IN Q5A]

Recycle via recycling bins in public areas [PROGRAMMER NOTE: RESPONDENT CAN ONLY SELECT IF 'YES-RECYCLED ONLY' OR 'YES – HAVE RECYCLED AND HAVE RETURNED FOR A REFUND' SELECTED IN Q5A]

Return to a bottle depot for a refund [PROGRAMMER NOTE: RESPONDENT CAN ONLY SELECT IF 'YES – RETURNED TO A BOTTLE DEPOT FOR A REFUND ONLY' OR YES – HAVE RECYCLED AND HAVE RETURNED FOR A REFUND' IN Q5A]

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 ALL]

- 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 NEVER SELECTED IN Q11. 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 Q16A]

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 Q16A, 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

16A. If it was possible to have a bottle depot closer to where you live – that is, in your community or neighbourhood – would you support the building of a new depot?

Please select one response only

Yes

No

Don't know

[ASK Q16B IF NO IN Q16A]

16B. Why wouldn't you support the building of a new depot in your community or neighbourhood?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

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 2010, the overall return rate for beverage containers in Alberta was 83%. 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!