



Ipsos Reid



BEVERAGE CONTAINER MANAGEMENT BOARD

Beverage Container Recycling – A Survey of Albertans 2013

Draft Report

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SUMMARY OF KEY FINDINGS

Ipsos Reid conducted a total of 1,007 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 2011 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 and juice containers can be returned for a refund is extremely high (i.e. greater than 90%) – the exceptions being juice cans (69%) and foil juice pouches (58%). That being said, *awareness that juice cans can be returned for a refund sees a significant 11 percentage point increase* from 2012, following a 6 percentage point increase from 2010 to 2012 (69% 2013 vs. 58% 2012 vs. 52% 2010). Further, *awareness that foil juice pouches can be returned for a refund is up 7 percentage points* from 2012 (58% 2013 vs. 51% 2012), while *refrigerated juice cartons* (92%, up 4 percentage points from 2012) and *juice tetra paks* (92%, up 2 percentage points from 2012) *also realize significant gains*.

Awareness is also extremely high that most types of water and alcoholic beverage containers can be returned for a refund – the exception being bag-in-a-box wine or juice (one should note that it is also among the least purchased beverage containers). Nevertheless, *awareness that bag-in-a-box wine or juice can be returned for a refund is up a significant 6 percentage points* from 2012 (49% 2013 vs. 43% 2012).

Awareness that dairy containers can be returned for a refund is up from 2012 – in fact, significant increases are seen for all types of dairy containers assessed. The biggest increase is seen for *liquid meal replacement containers* (45%, up 10 percentage points from 2012, and a total of 15 percentage points from 2010). *Milk jugs* (96%, up 5 percentage points), *milk cartons* (90%, up 6 percentage points), *liquid cream cartons* (78%, up 7 percentage points), *'milk to go'* containers (77%, up 6 percentage points), *milk tetra paks* (75%, up 6 percentage points) and *yogurt drinks* (53%, up 7 percentage points) also see significant gains in awareness of redemption from 2012.

Recycling and Redemption of Beverage Containers

Reported recycling of beverage containers in the past six months is near universal (98%), while redemption is 91%.

Among Albertans who have purchased each type of beverage container, reported incidence of recycling and/or redemption tops the 80% mark for all categories, while incidence of redemption is 80% or higher for all but four types of beverage containers. *Container types that less than eight-in-ten purchasers report returning to a bottle depot are liquid cream cartons (78%), bag-in-a box wine or juice (71%), liquid meal replacements (67%) and yogurt drinks (67%).*

Significant gains are seen from 2012 for several types of dairy containers: milk cartons – recycling and/or redemption is up 3 percentage points and redemption is up 6 percentage points, milk jugs – redemption is up 6 percentage points and milk tetra paks – redemption is up 18 percentage points. Further, redemption of liquid cream cartons is up 9 percentage points from 2010, while redemption of ‘milk to go’ containers sees an 11 percentage point increase in the same time period.

Frequency of Recycling or Redeeming Milk Containers

Roughly three-quarters (74%) of Albertans say they always recycle or return milk and cream containers, while just 2% say they never do. The most frequent reasons given for not always recycling or returning milk and cream containers are simply forgetting (18%) and consuming dairy beverages in locations where recycling is not available (14%).

Awareness of the Refundable Deposit for Beverage Containers

Awareness of the deposit for beverage containers more than one litre in size approaches the 50% mark.

More than half (56%) of Albertans know the refundable deposit for beverage containers that are one litre or less, while 47% (*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, 42% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 54% say it would make no difference. Findings are near identical when it comes to containers more than one litre in size – 43% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 54% 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, 12% at a

liquor store, 8% at a convenience store and 6% at a gas station. Cash register receipts (52%) are the most common channel, followed by the shelf where the product is placed (36%) and on a sign or poster on the wall (25%).

While Albertans think **putting the refundable deposit value on the container** itself (69% very effective) or *on the shelf where the product is placed* (40% 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 small percentage (5%) of Albertans who say their household has *never* returned beverage containers to a depot, many indicate they recycle the containers instead – 29% ‘put into blue box’, 20% ‘leave them for bottle collectors’, 19% ‘donate to charity’ and 9% ‘use the building recycling program’. The other frequently given reason is ‘too much trouble’ (27%). 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’ (58%), though 16% also cite the ‘line up or waiting time at the depot’.

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** (78% very important – i.e. a rating of 7 or 6 on a 7-point scale). In the next tier are *convenience of the location* (58% very important) and *hours of operation* (52% very important), followed by *waiting time* (45% very important), *customer service* (44% very important) and *safety* of the depot location (39%), while *cleanliness* (29%) and *overall appearance* (24%) of the depot are the least important factors.

Satisfaction with most aspects of bottle depots is very high. The majority of Albertans (81%) are very satisfied (i.e. a rating of 7 or 6 on a 7-point scale) with *getting the refundable deposit back*, *convenience of the location* (63%), *safety* of the area in which the depot is located (61%), *customer service* (58%), *waiting time* (56%) and *hours of operation* (56%). *Comparatively lower* is satisfaction with the *overall appearance* (38% very satisfied) and *cleanliness* (36% very satisfied) of the depot. In general, *satisfaction tends to be lower among residents of Edmonton*.

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* (21%), *increasing the refundable deposit* (20%) and *improving various aspects of bottle depots* (12%). It is notable that one-quarter (25%) of respondents ‘don’t know’ what could be done while one-in-ten (11%) say ‘nothing more’.

Younger Albertans

Research findings suggest that younger Albertans aged 18 to 34 years are less engaged than their older counterparts.

- Significantly *fewer* (61%) 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 (76%) and 55 years or older (86%). In fact, 'significant benefit to the environment' ratings are *lower* among younger Albertans compared to those aged 35 years or older for six of the seven activities assessed (the exception being *reducing car use*).
- Reported incidence of *always* recycling or returning milk and cream containers is significantly *higher* among Albertans aged 35 years or older (78%) compared to younger residents aged 18 to 34 years (65%) – further, incidence is particularly low (49%) among those aged 18 to 24 years.
- Satisfaction with most aspects of bottle depots tends to be 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 redemption is *lower* among past 5 years newcomers to Alberta (82%).
- It is notable that redemption of liquid cream cartons (54%) in particular, but also milk cartons (71%) and milk jugs (69%) is significantly *lower* among past five years newcomers to the province.

Residents of Edmonton

Residents of Edmonton differ on a number of dimensions.

- Reported incidence of returning containers to a bottle depot is significantly *lower* among residents of Edmonton (84%) compared to their counterparts in Calgary (91%), Smaller Cities (93%) and Rural areas (96%).
- When those who would not support the building of a new depot closer to where they live are asked why, mentions of concerns about 'attracting homeless or rough characters' are *highest* among residents of Edmonton (32%).
- Satisfaction with various aspects of bottle depots tends to be *lower* among residents of Edmonton.

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 and Sustainable Resource Development. 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 2011, the beverage container return rate reached 83.5%, the highest achieved to date. 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, 2012 and again in 2013. Key research objectives of the 2013 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 28th and March 7th, 2012, Ipsos Reid conducted a total of 1,007 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 20011 Canadian Census data.

With a sample of 1,007, 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%	231	23.0%	$\pm 6.5\%$
City of Calgary	793,490	31.6%	273	27.1%	$\pm 6.0\%$
Smaller Cities North ¹	302,355	12.0%	126	12.5%	$\pm 8.8\%$
Smaller Cities South ²	288,280	11.5%	126	12.5%	$\pm 8.8\%$
Rural North	296,620	11.8%	125	12.4%	$\pm 8.8\%$
Rural South	253,325	10.1%	126	12.5%	$\pm 8.8\%$
TOTAL	2,514,960	100%	1,007	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					

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

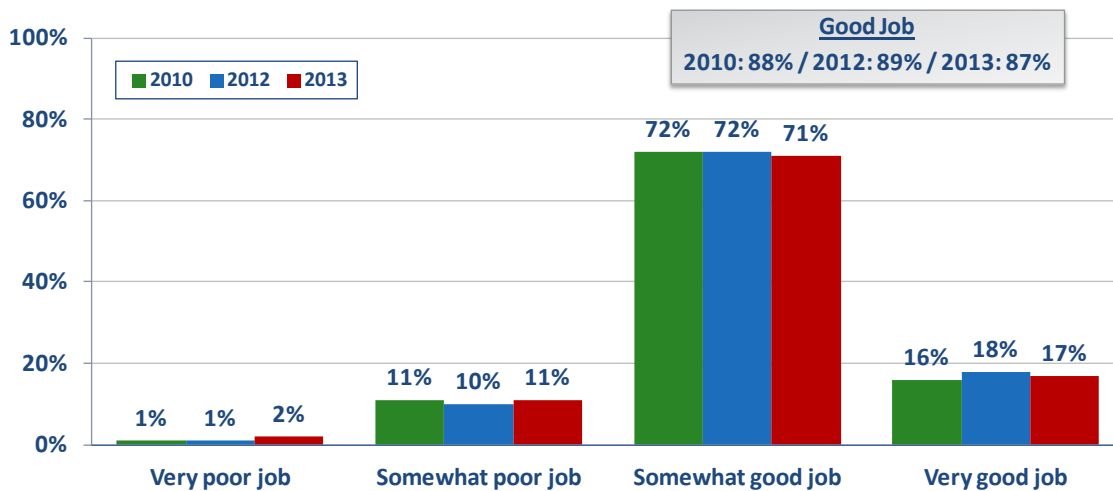
Personal Performance

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 (71% somewhat good) recognize that they could be doing more. Findings are consistent with 2012.

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, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



Though still high, significantly *fewer* (82%) residents of Edmonton give themselves ‘good job’ ratings compared to their counterparts in Calgary (90%), Smaller Cities South (95%) and the Rural South (91%).

It is also interesting to note that there is some linkage between perceptions of personal performance and environmental behaviours. For example, reported incidence of *always* recycling/returning milk containers increases significantly with perceived personal performance – from 56% among those who say they do a *poor* job, to 74% among those who say they do a *somewhat good* job to 84% among those who say they do a *very good* job.

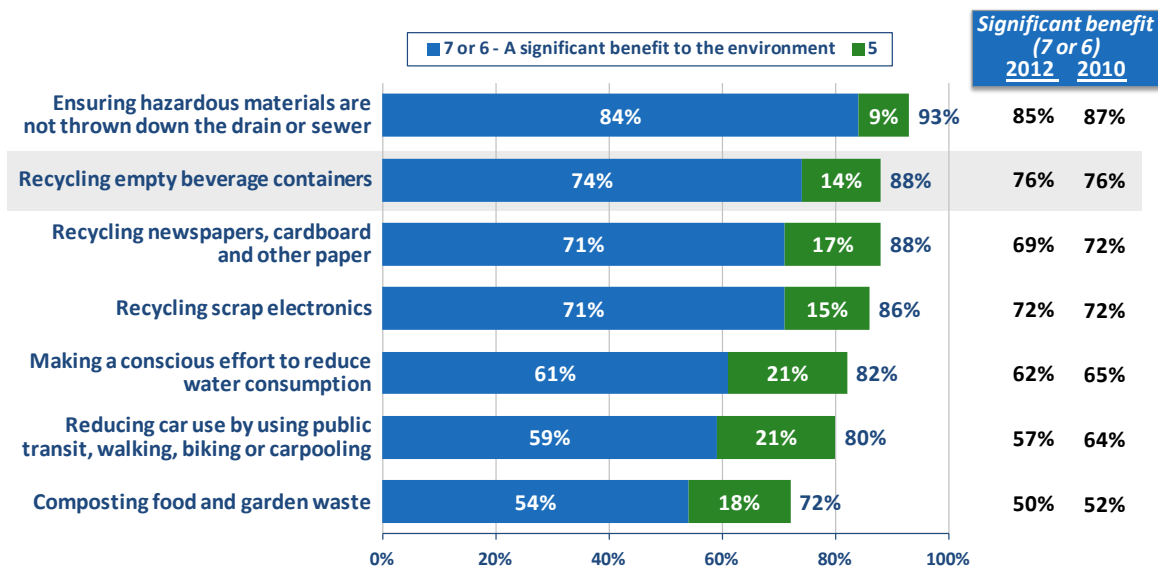
Perceived Impact of Environmental Behaviours

Albertans clearly recognize the importance of recycling empty beverage containers.

Three-quarters (74%) 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* (84%), but slightly ahead of *recycling newspapers, cardboard and other paper* and *recycling scrap electronics* (both 71%).

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, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



When the data are analyzed by age, significantly *fewer* Albertans aged 18 to 34 years (61%) think *recycling empty beverage containers* has a significant benefit to the environment compared to adults aged 35 to 54 years (76%) and 55 years or older (86%). In fact, ‘significant benefit to the environment’ ratings are *lower* among younger Albertans compared to those aged 35 years or older for six of the seven activities assessed (the exception being *reducing car use*).

BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS

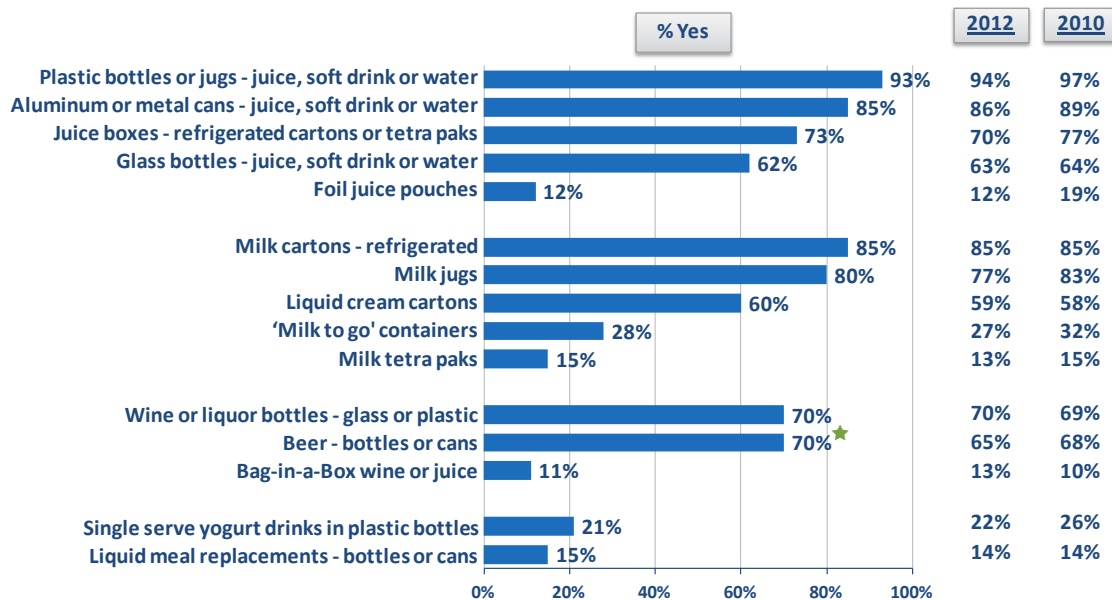
Past Six Months Purchase of Beverage Containers

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 2012.

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, 2013n=1,007 / 2012 n=1,006 / 2010 n=1,206)



* Denotes statistically significant change from 2012 to 2013

Awareness of Refundable Beverage Containers

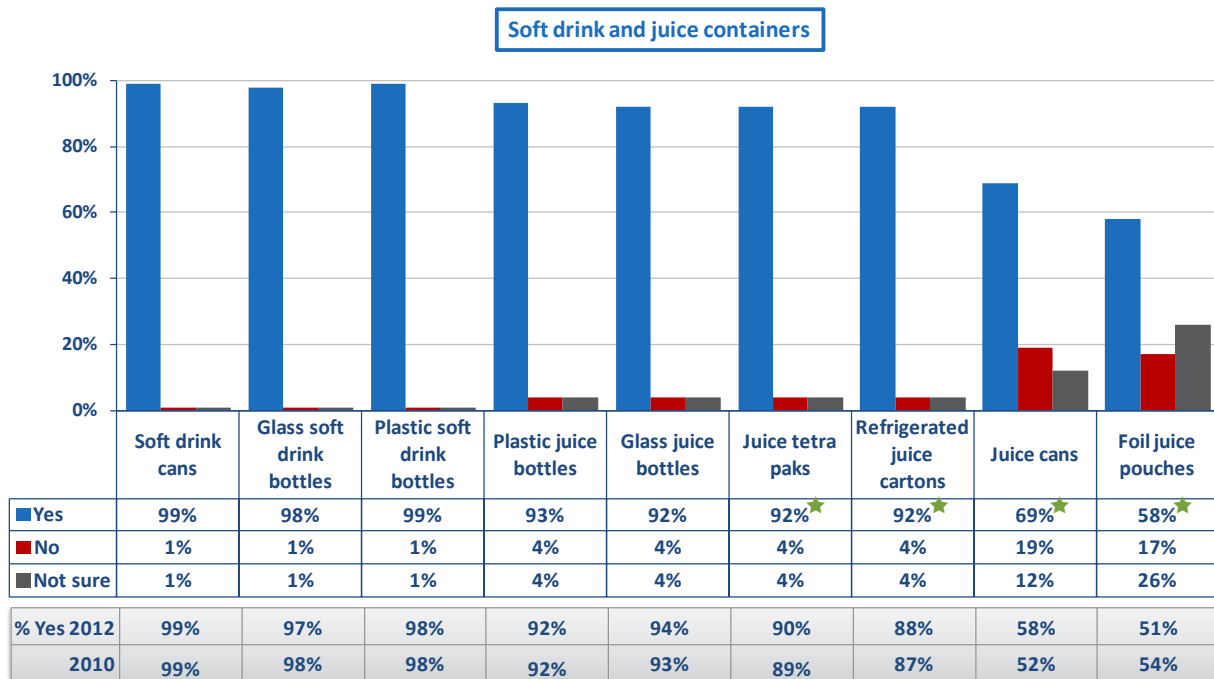
Awareness that juice tetra paks, juice cartons, juice cans and foil juice pouches can be returned for a refund is up significantly from 2012.

Awareness that most types of soft drink and juice containers can be returned for a refund is extremely high (i.e. greater than 90%) – the exceptions being juice cans (69%) and foil juice pouches (58%).

That being said, awareness that *juice cans* can be returned for a refund sees a significant 11 percentage point increase from 2012, following a 6 percentage point increase from 2010 to 2012 (69% 2013 vs. 58% 2012 vs. 52% 2010). Further, awareness that *foil juice pouches* can be returned for a refund is up 7 percentage points from 2012 (58% 2013 vs. 51% 2012), while *refrigerated juice cartons* (92%, up 4 percentage points from 2012) and *juice tetra paks* (92%, up 2 percentage points from 2012) also realize significant gains.

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, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)

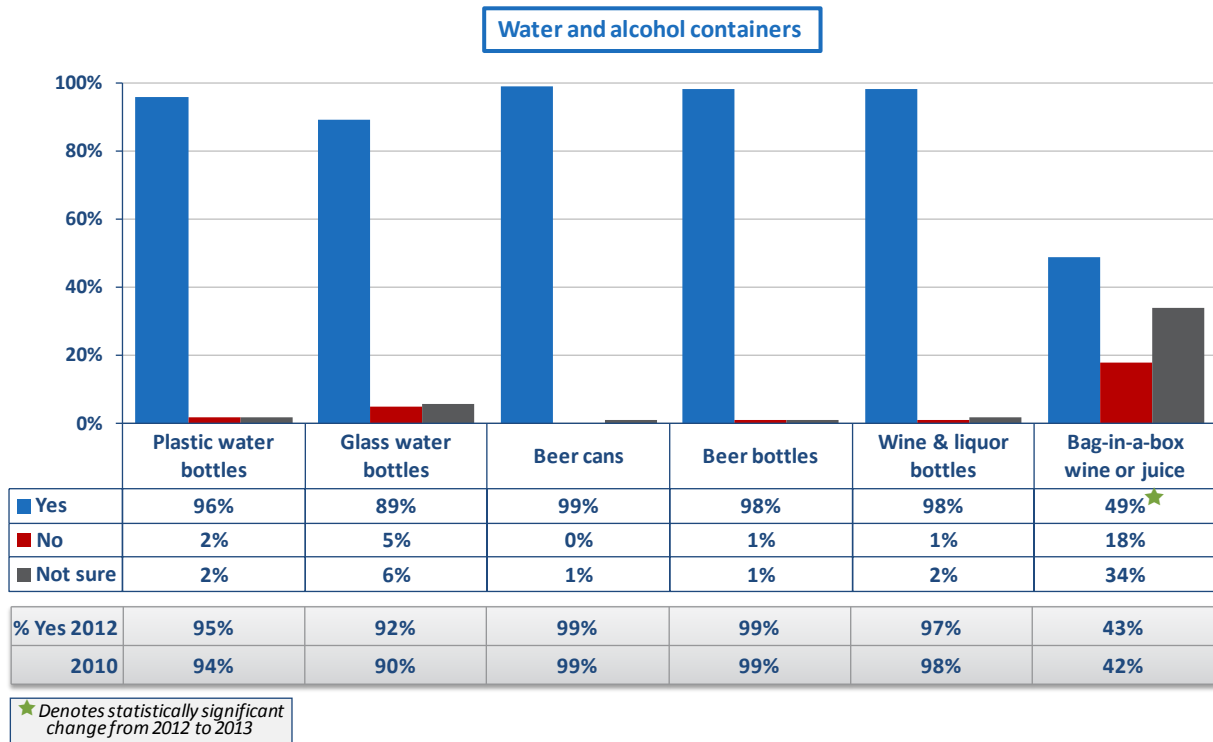


★ Denotes statistically significant change from 2012 to 2013

Awareness is also extremely high that most types of water and alcoholic beverage containers can be returned for a refund – the exception being bag-in-a-box wine or juice (one should note that it is also among the least purchased beverage containers). Nevertheless, awareness that *bag-in-a-box wine or juice* can be returned for a refund is up a significant 6 percentage points from 2012 (49% 2013 vs. 43% 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, 2013 n=1,007 2012 n=1,006 / 2010 n=1,206)



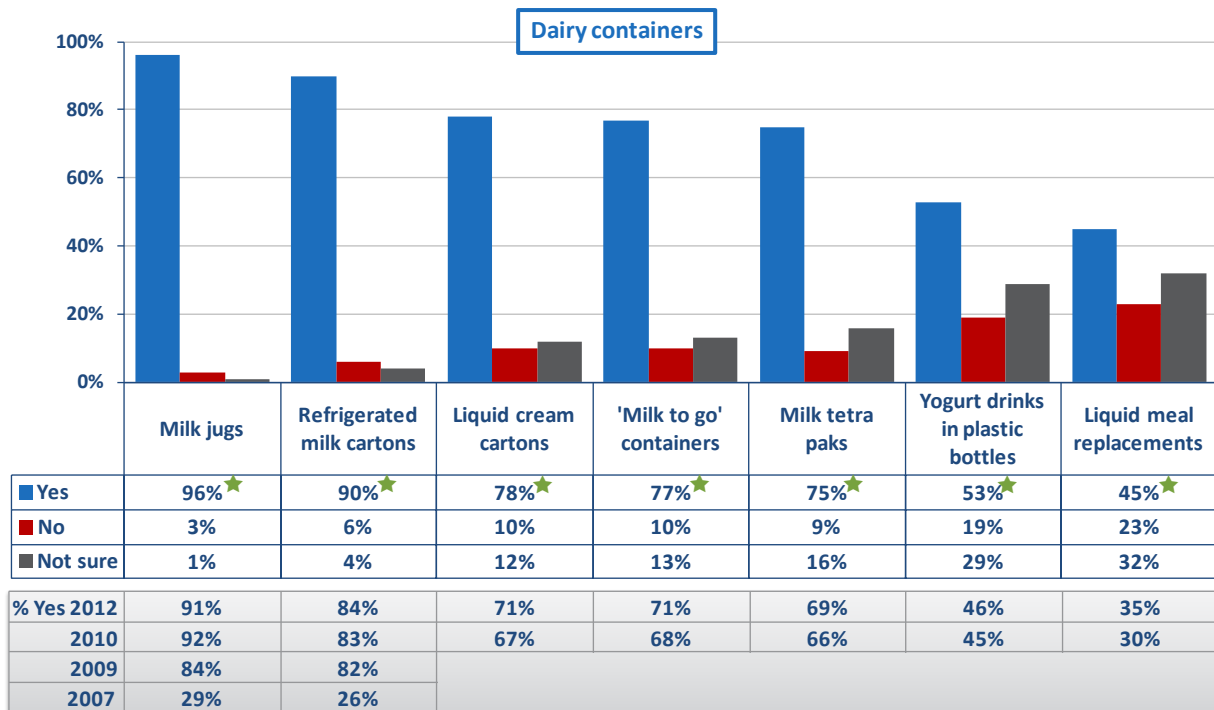
Awareness that dairy containers can be returned for a refund is up from 2012 – in fact, significant increases are seen for *all* types of dairy containers assessed. It is notable that most of these gains – with the exception of ‘milk to go’ containers – are due to increased awareness among residents of Calgary.

While awareness that most types of dairy containers can be returned for a refund is now at the 75% mark or higher, awareness of the refundable deposit on yogurt drinks (53%) and liquid meal replacements (45%) continue to lag.

Still, awareness that *liquid meal replacement* containers can be returned for a refund has increased 15 percentage points over the past three years – a significant 10 percentage point increase from 2012 (45% 2013 vs. 35% 2012) following a significant 5 percentage point increase from 2010 to 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, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



★ Denotes statistically significant change from 2012 to 2013

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).

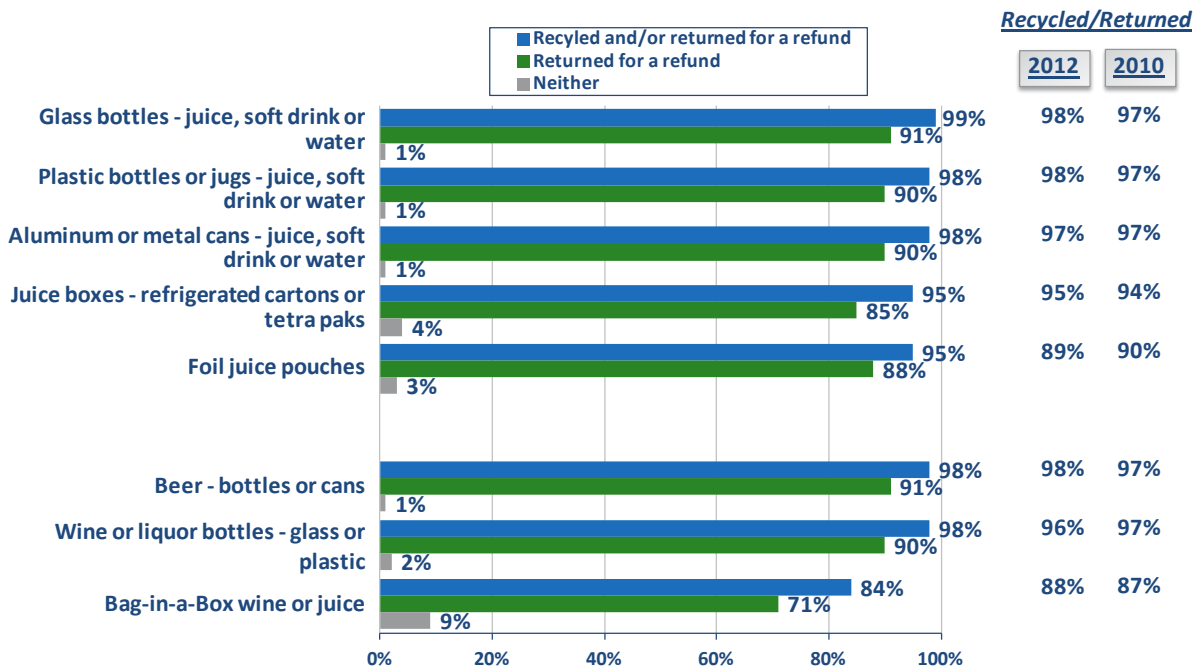
Incidence of Beverage Container Recycling and Redemption by Type of Container

Among Albertans who have purchased each type of beverage container, reported incidence of recycling and/or redemption tops the 80% mark for all categories, while incidence of redemption is 80% or higher for all but four types of beverage containers.

Container types that less than eight-in-ten purchasers report returning to a bottle depot are liquid cream cartons (78%), bag-in-a box wine or juice (71%), liquid meal replacements (67%) and yogurt drinks (67%).

What does your household do with these beverage containers? Past 6 months purchasers

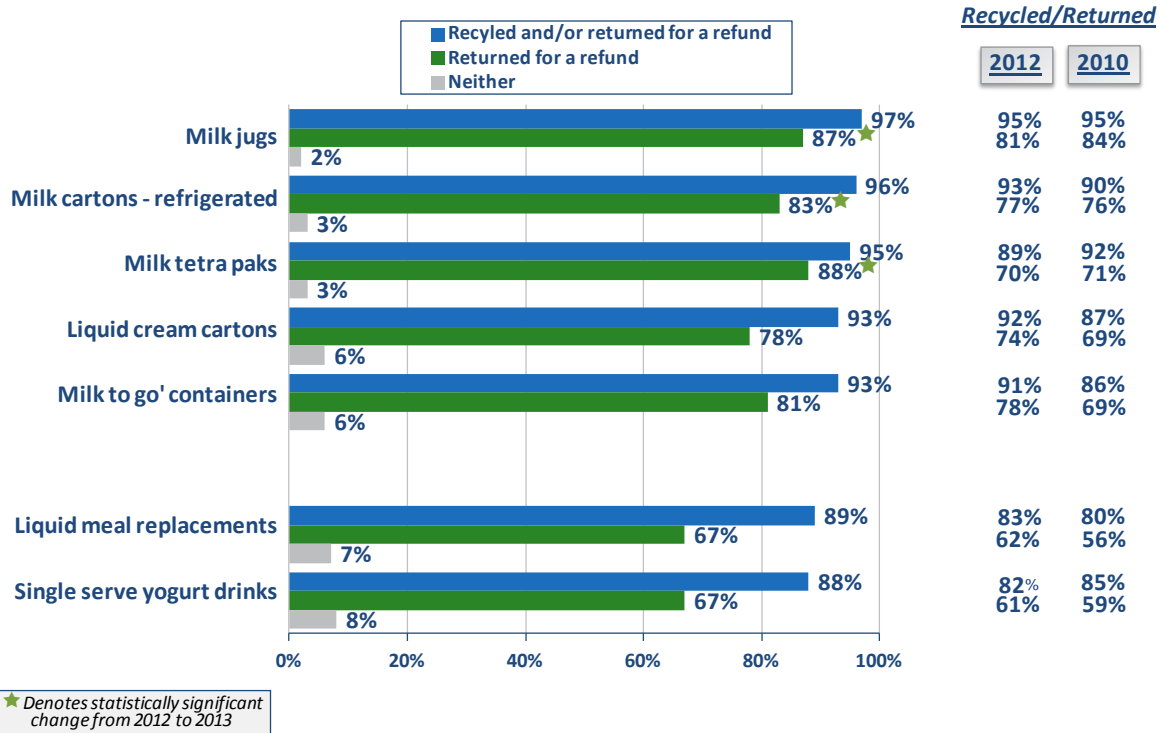
Q5A. Thinking about the past 6 months, please indicate if your household has recycled or returned for a refund each of the following types empty beverage containers. (Base: Have purchased in the past 6 months n=1,007)



With regards to redemption, though a couple of dairy containers continue to lag, significant gains are seen from 2012 for: *milk cartons* – recycling and/or redemption is up 3 percentage points and redemption is up 6 percentage points, *milk jugs* – redemption is up 6 percentage points and *milk tetra paks* – redemption is up 18 percentage points. Further, redemption of *liquid cream cartons* is up 9 percentage points from 2010, while redemption of ‘*milk to go*’ containers sees an 11 percentage point increase in the same time period.

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 n=1,007)



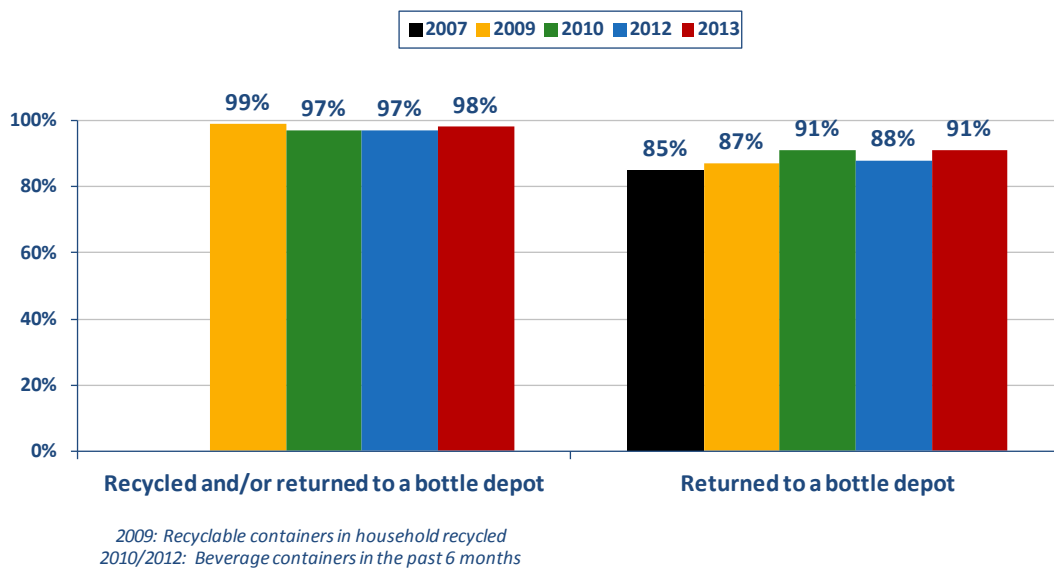
It is notable that redemption of liquid cream cartons (54%) in particular, but also milk cartons (71%) and milk jugs (69%) is significantly lower among past five years newcomers to the province.

Overall Incidence of Beverage Container Recycling and Redemption

Reported recycling and/or redemption of beverage containers in the past six months remains near universal (98%) among Albertans, while nine-in-ten (91%) indicate they have returned beverage containers to a bottle depot in the same time frame. Findings are consistent with 2012.

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

(Base: All respondents, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



Though still quite high, incidence of redemption is *lower* among past 5 years newcomers to Alberta (82%).

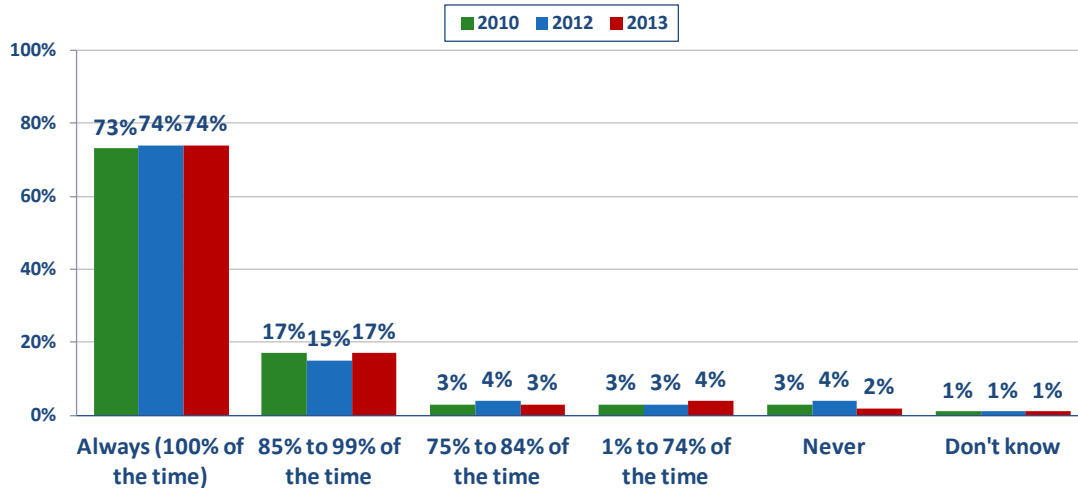
It is also notable that reported incidence of returning containers to a bottle depot is significantly *lower* among residents of Edmonton (84%) compared to their counterparts in Calgary (91%), Smaller Cities (93%) and Rural areas (96%).

Frequency of Recycling or Returning Milk Containers for a Refund

Roughly three-quarters (74%) of Albertans say they *always* recycle or return milk and cream containers, while just 2% say they never do. Results are consistent with 2012.

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, 2013 n=987 / 2012 n=977 / 2010 n=1,189)

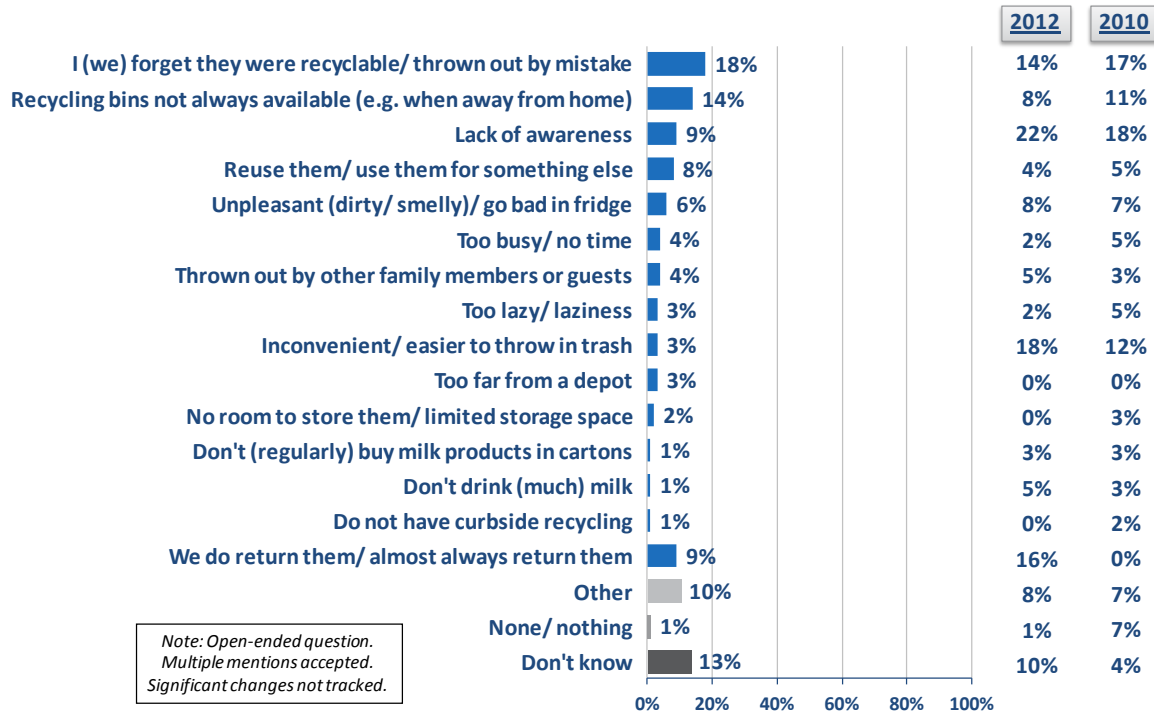


Reported incidence of *always* recycling or returning milk and cream containers is significantly *higher* among Albertans aged 35 years or older (78%) compared to younger residents aged 18 to 34 years (65%) – further, incidence is particularly low (49%) among those aged 18 to 24 years.

The most frequent reasons given for not *always* recycling or returning milk and cream containers are simply forgetting (18%) and consuming dairy beverages in locations where recycling is not available (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, 2013 n=253 / 2012 n=245 / 2010 n=302)



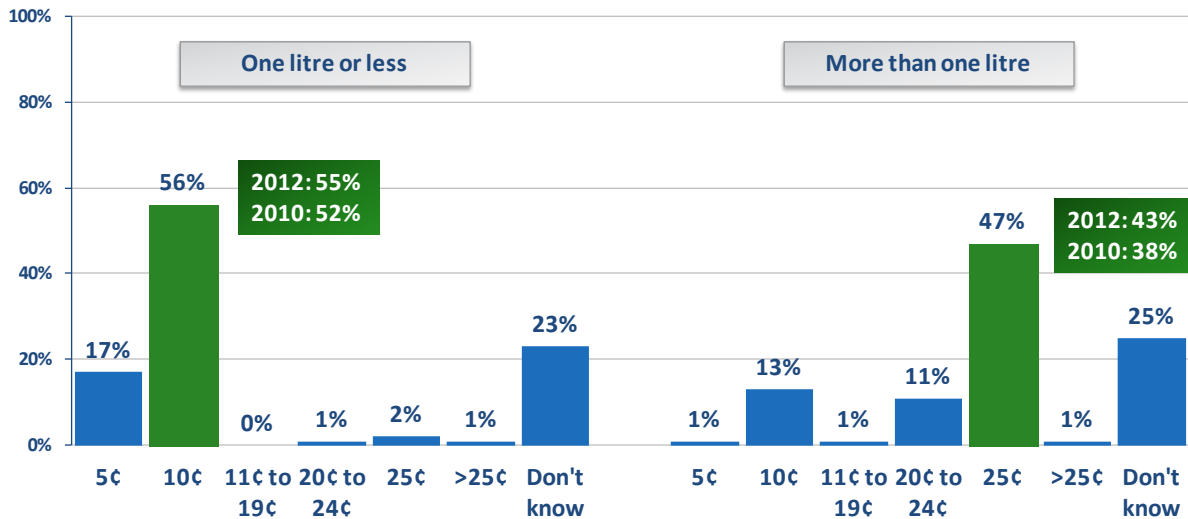
Awareness of Refundable Deposit for Beverage Containers

Awareness of the deposit for beverage containers more than one litre in size approaches the 50% mark.

Fifty-six percent of Albertans correctly specify 10 cents as the refundable deposit on beverage containers that are one litre or less, while 17% 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 (47%) correctly say 25 cents, while 26% 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 9 percentage point increase from three years ago (47% 2013 vs. 38% 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=1,007)

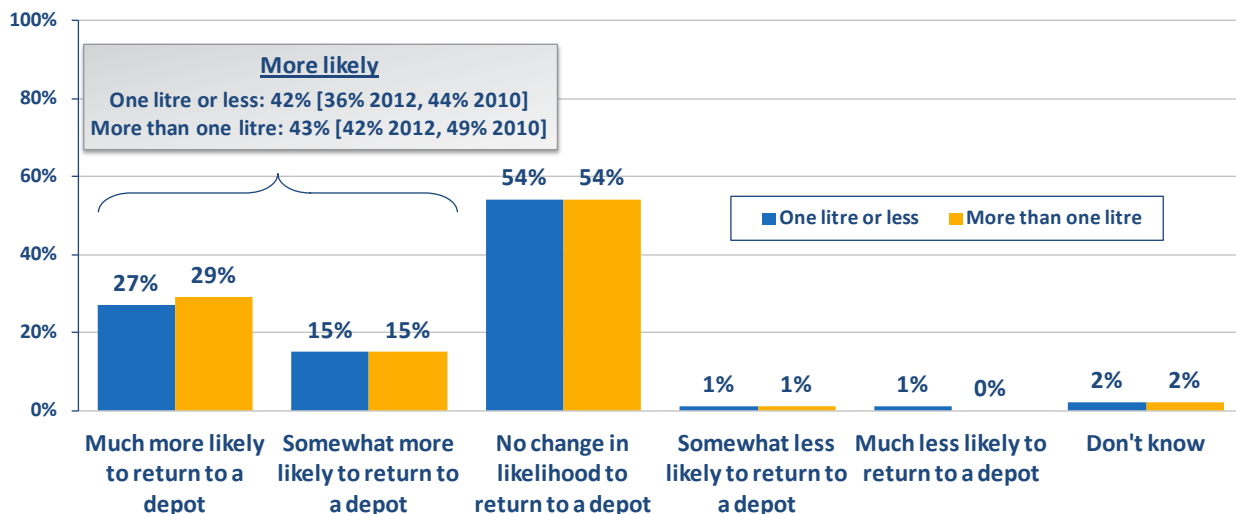


Perceived Impact of Knowing the Refundable Deposit for Beverage Containers

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, 42% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 54% say it would make no difference. Findings are near identical when it comes to containers more than one litre in size – 43% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 54% say it would make no difference. Findings are consistent with 2012.

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¢: 2013 n=444 /2012 n=455 / 2010 n=576, 25¢: 2013 n=532 / 2012 n=582 / 2010 n=743)

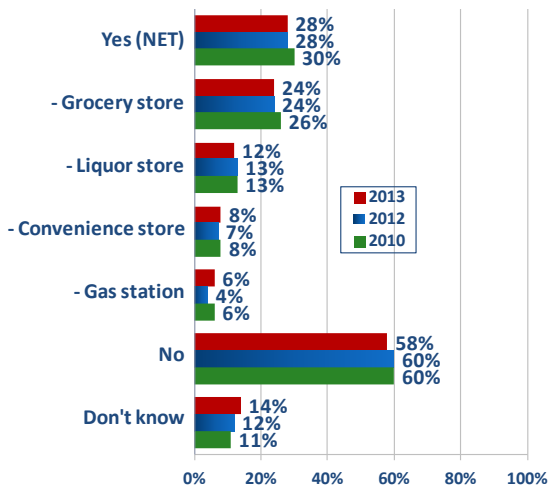


Recall of Information about Refundable Deposits

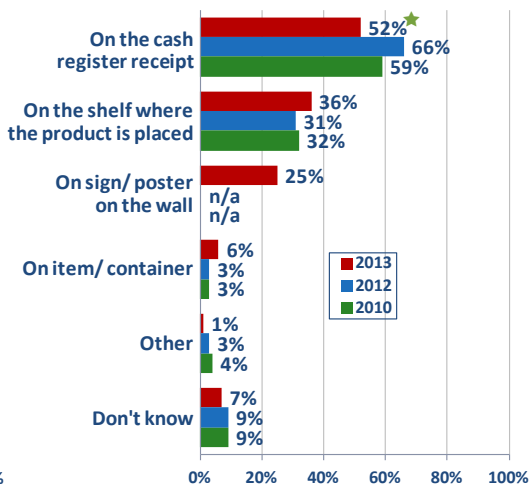
Three-in-ten (28%) Albertans say they have seen information at retail stores that identifies the refundable deposit on beverage containers. One quarter (24%) at grocery stores, 12% at a liquor store, 8% at a convenience store and 6% at a gas station. Cash register receipts (52%) are the most common channel, followed by the shelf where the product is placed (36%) and on a sign or poster on the wall (25%).

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, 2013 n=1,007 / 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, 2013 n=277 / 2012 n=272 / 2010 n=339)



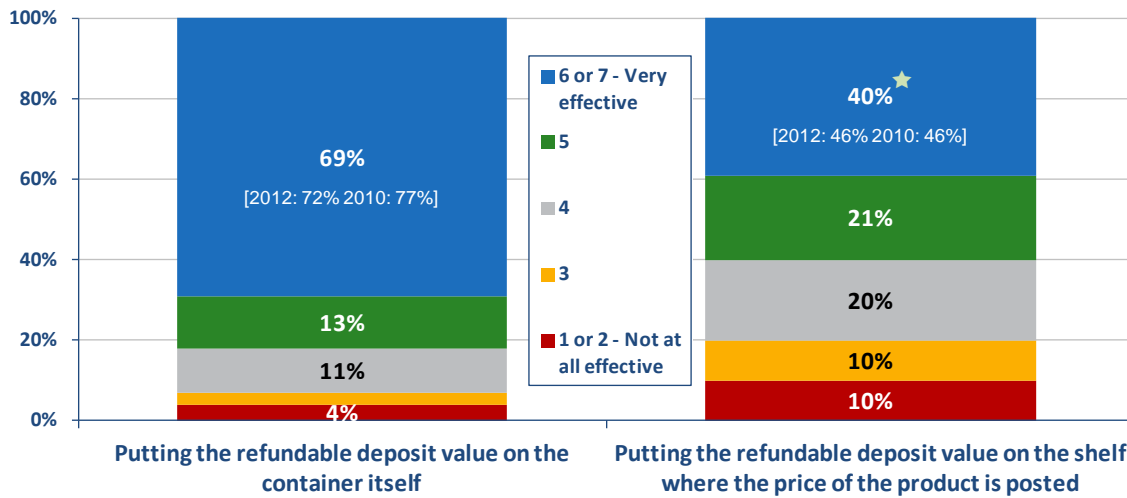
* Denotes statistically significant change from 2012 to 2013

Means of Increasing Public Awareness about Refundable Beverage Containers

While Albertans think putting the refundable deposit value on the container itself (69% very effective) or on the shelf where the product is placed (40% very effective) would both be effective means of increasing awareness, the former would clearly be the more effective measure. Further, the percentage of Albertans who consider *putting the refundable deposit on the shelf where the price of the product is posted* very effective is down significantly from 46% in 2012.

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, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



★ Denotes statistically significant change from 2012 to 2013

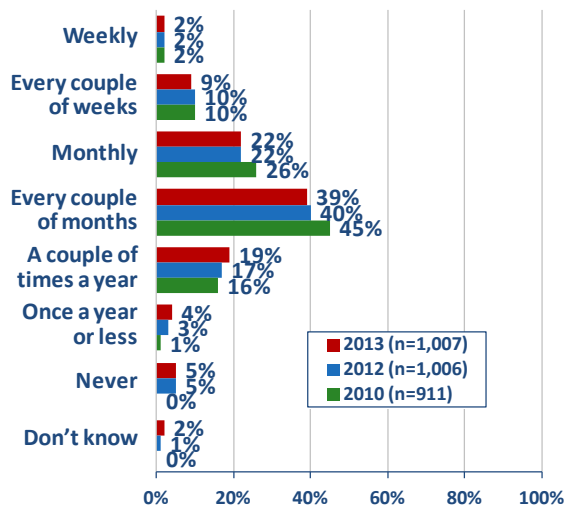
BOTTLE DEPOTS

Frequency of Visitation

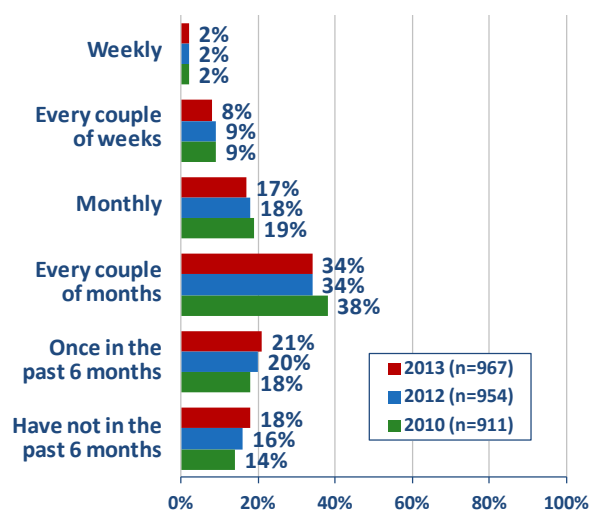
One-third (33%) of Albertans say their household returns containers to a bottle depot at least once a month, while another 39% make a trip every couple of months and just 5% say they never do so. Further, 82% of Albertans whose households have returned items for a refund indicate they have personally visited a depot in the past six months. Frequency of visiting bottle depots is consistent with 2012.

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: 2013,2012: 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: Household has returned for refund)

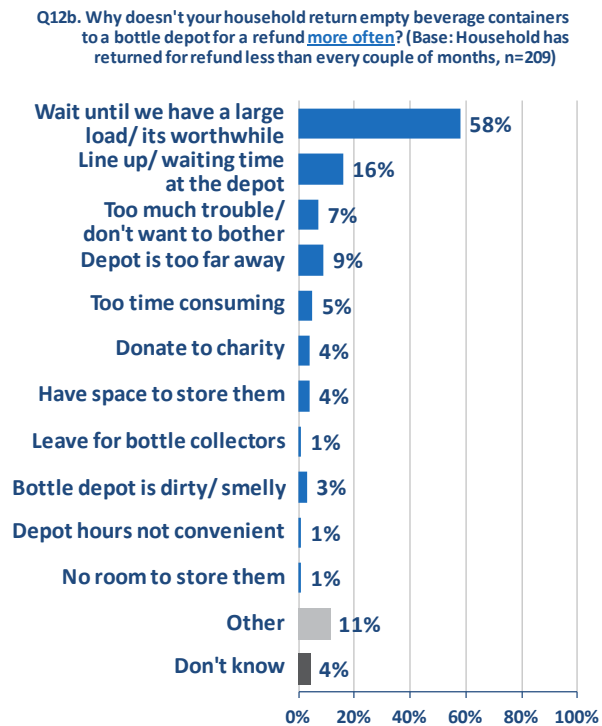
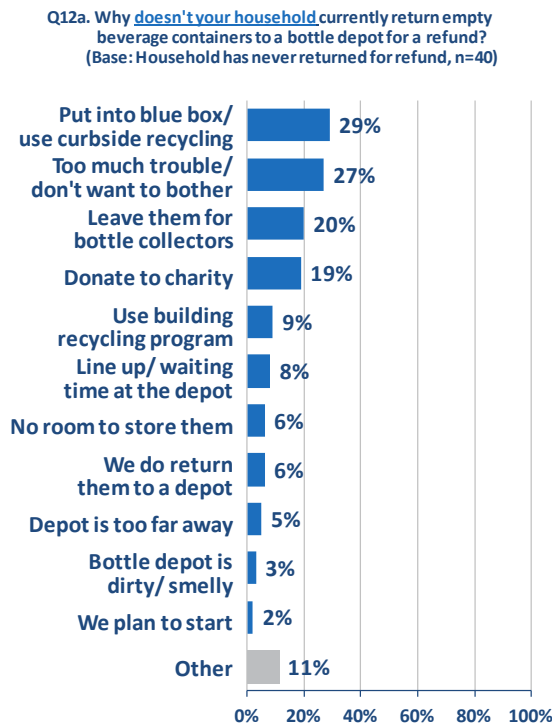


Reasons for Not Returning Beverage Containers to Depots or Not Returning More Often

Among the small percentage (5%) of Albertans who say their household has *never* returned beverage containers to a depot, many indicate they recycle the containers instead – 29% ‘put into blue box’, 20% ‘leave them for bottle collectors’, 19% ‘donate to charity’ and 9% ‘use the building recycling program’. The other frequently given reason is ‘too much trouble’ (27%).

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’ (58%), though 16% also cite the ‘line up or waiting time at the depot’.

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

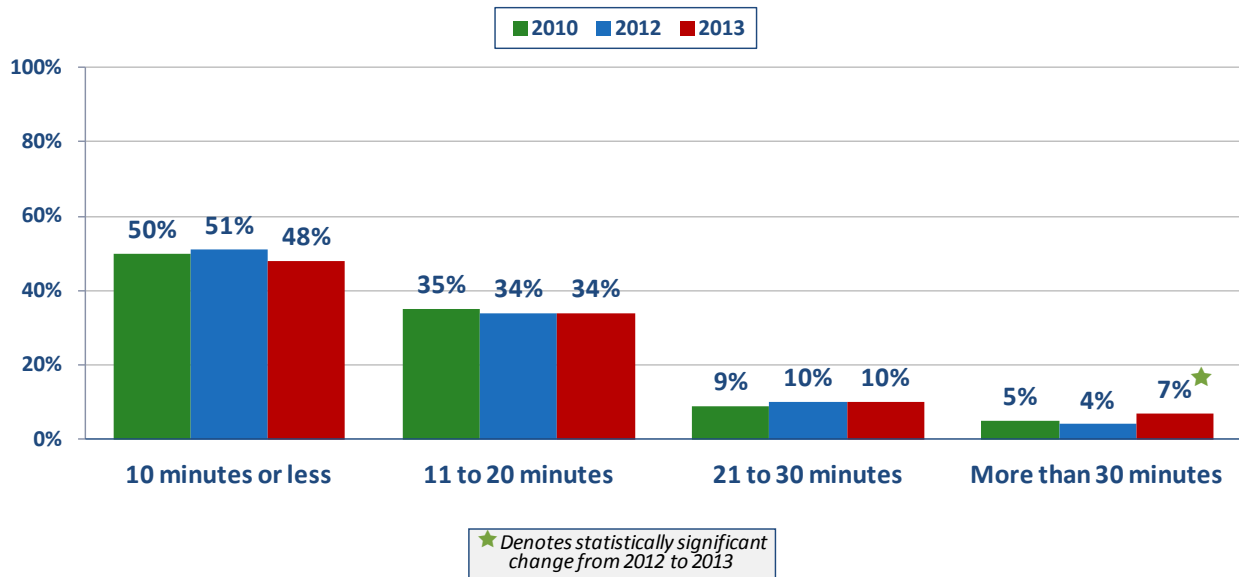


Travel Time to Bottle Depots

Half (48%) of past six months visitors say it takes 10 minutes or less to get to the bottle depot they use most often, while 17% say it takes more than 20 minutes. As might be expected, Rural Albertans report longer travel times.

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, 2013 n=794 / 2012 n=772 / 2010 n=782)

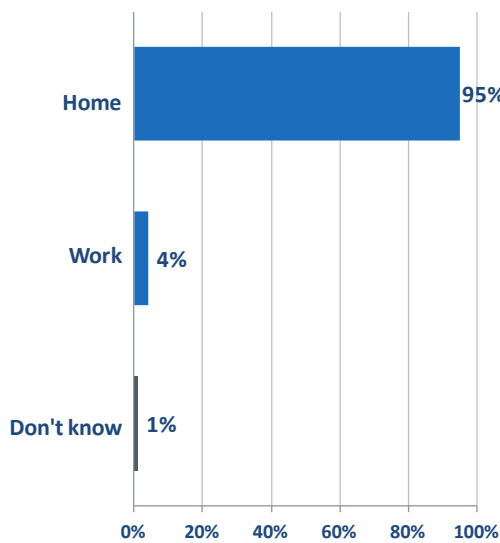


Route Taken to Depot and Satisfaction with Hours of Operation

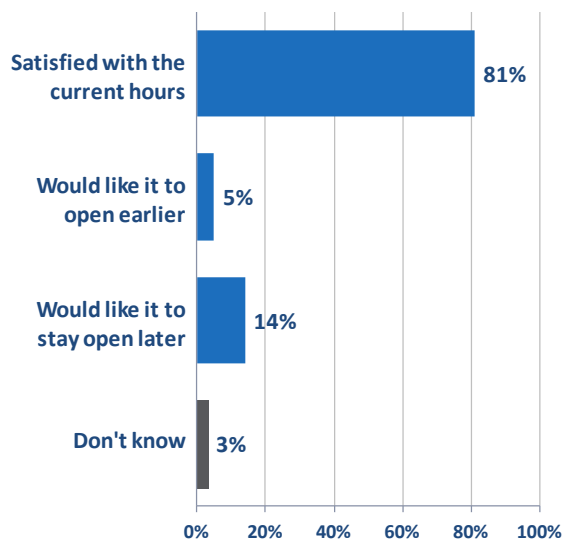
The vast majority (95%) of Albertans say they typically go to the depot they use most often from home rather than from work or another location, while four-in-five (81%) say they are satisfied with the hours of operation of the depot they use most often. Still, 5% indicate they would like the depot to open earlier and 14% say they would like the depot to stay open later, with 7pm or 8pm the preferred closing time.

From where do you go to the depot and are you satisfied with the hours?

Q16.1 Do you typically go to the bottle depot you use most often from home, from work or from another location?
(Base: Personally returned to depot in past 6 months, n=794)



Q16.2 Are you satisfied with the hours of operation of the bottle depot you use most often or would you prefer longer hours?
(Base: Personally returned to depot in past 6 months, n=794)



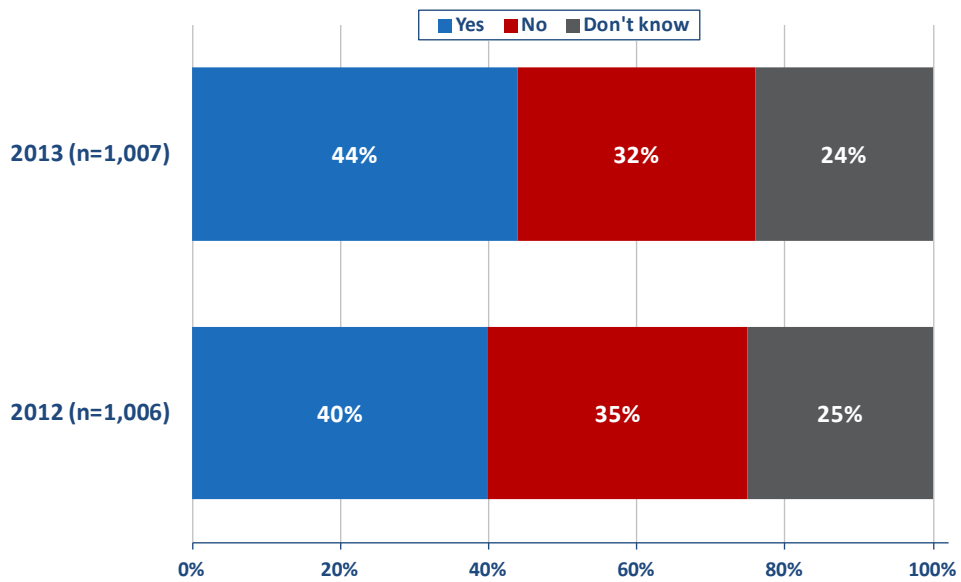
Support for a New Depot

When asked if they would support the building of a new bottle depot closer to where they live, Albertans are divided, with 44% saying ‘yes’ and 32% saying ‘no’ (the remaining 24% ‘don’t know’). Findings are consistent with 2012.

Support for a depot closer to where you live

Q16A. 2013: If it was possible to have a bottle depot closer to where you live – for example, near a local convenience store or grocery store – would you support the building of a new depot? / 2012: 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, 2013 n=1,007 / 2012 n=1,006)

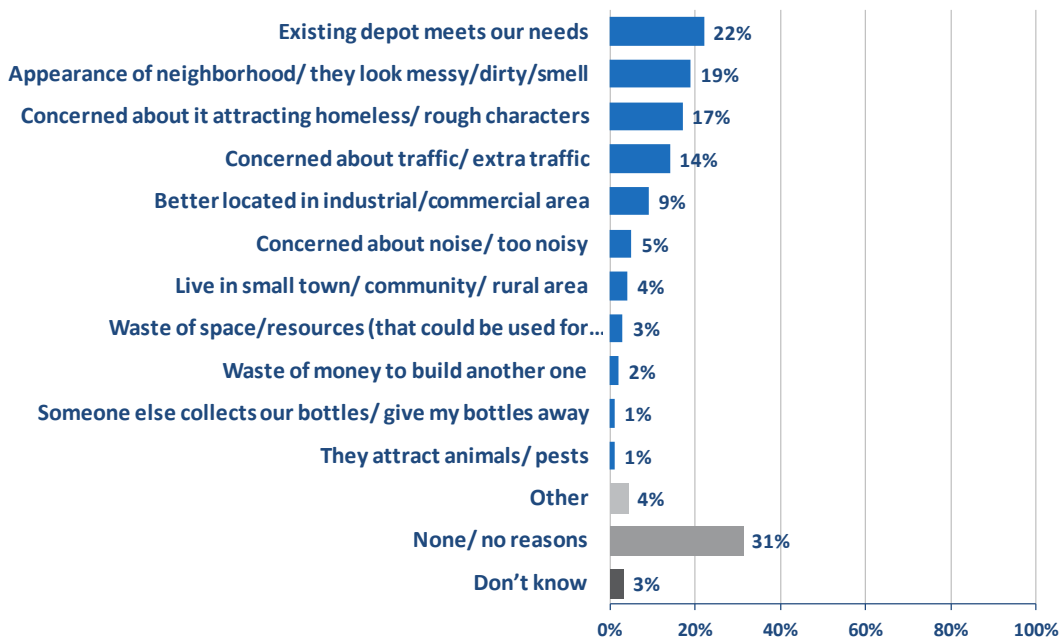
Note: Wording of question changed from 2012 to 2013



Albertans who said they *would not* support the building of a new bottle depot were asked: *Other than there being no need, do you see any disadvantages of having a bottle depot closer to where you live?* Three-in-ten (31%) said there were no disadvantages, while 22% said the ‘existing depot meets our needs’. The most frequent disadvantages cited were the ‘appearance of the neighbourhood’ (19%), ‘concern about attracting homeless or rough characters’ (17%) and ‘concern about traffic’ (14%). It is noteworthy that mentions of concerns about ‘attracting homeless or rough characters’ are *highest* among residents of Edmonton (32%).

Disadvantages of having a bottle depot closer to where you live

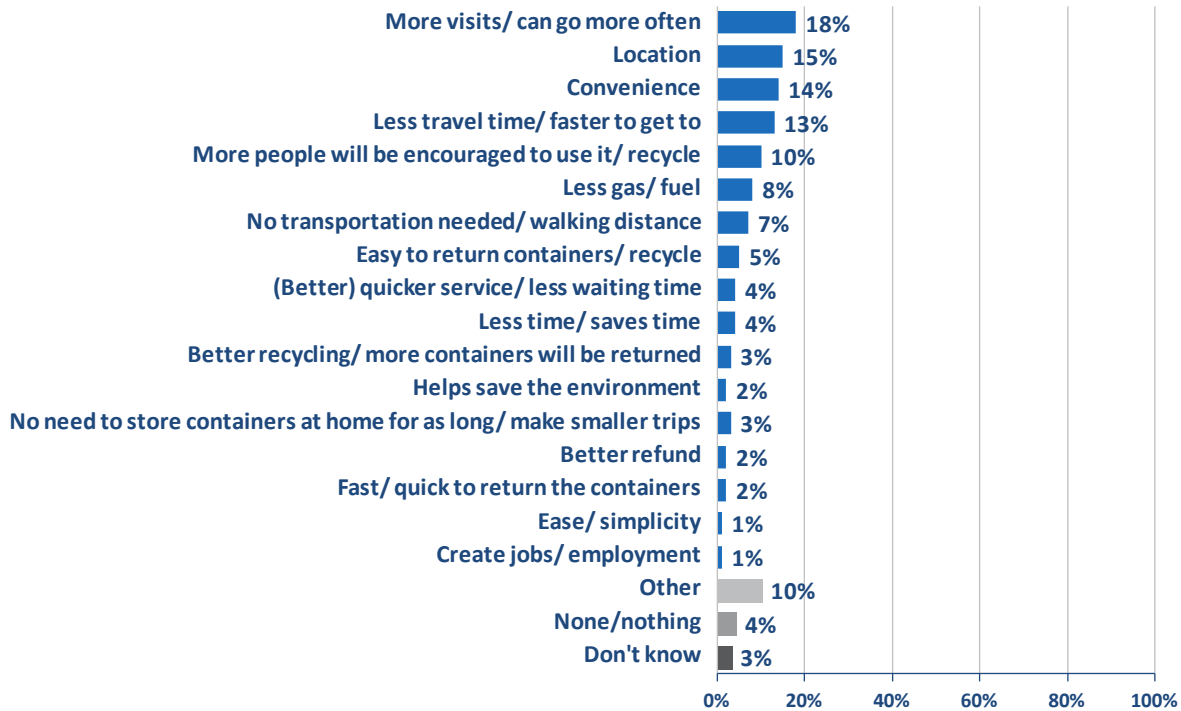
Q16b. Other than there being no need (i.e. the existing depot is close/ convenient enough), do you see any disadvantages of having a bottle depot closer to where you live? (Base: Would not support the building of a new depot, n=336)



Albertans who said they *would* support the building of a new bottle depot were asked: *What do you see as the advantages of having a depot closer to where you live?* A wide variety of responses were given with the most frequent being ‘more visits or can go more often’ (18%), ‘location’ (15%), ‘convenience’ (14%) and ‘less travel time’ (13%).

Advantages of having a bottle depot closer to where you live

Q16c. What do you see as the advantages of having a bottle depot closer to where you live?
(Base: Would support the building of a new depot, n=420)

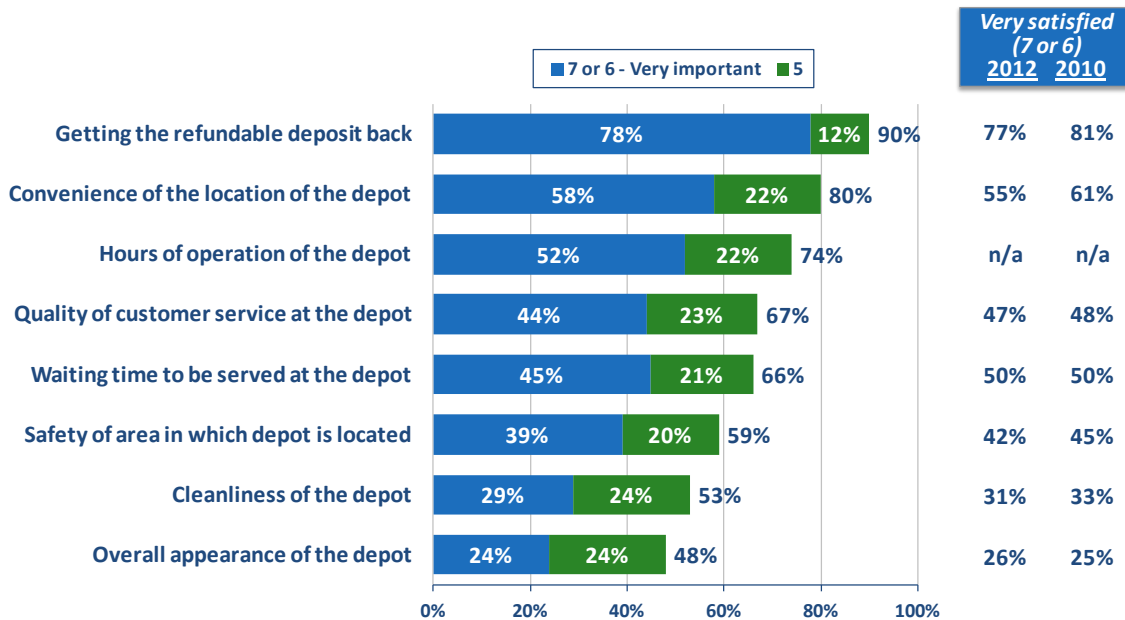


Importance of Bottle Depot Attributes

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* (78% very important – i.e. a rating of 7 or 6 on a 7-point scale). In the next tier are *convenience of the location* (58% very important) and *hours of operation* (52% very important), followed by *waiting time* (45% very important), *customer service* (44% very important) and *safety* of the depot location (39%), while *cleanliness* (29%) and *overall appearance* (24%) of the depot are the least important factors. Ratings are consistent with 2012.

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, 2013 n=794 / 2012 n=772 / 2010 n=782)

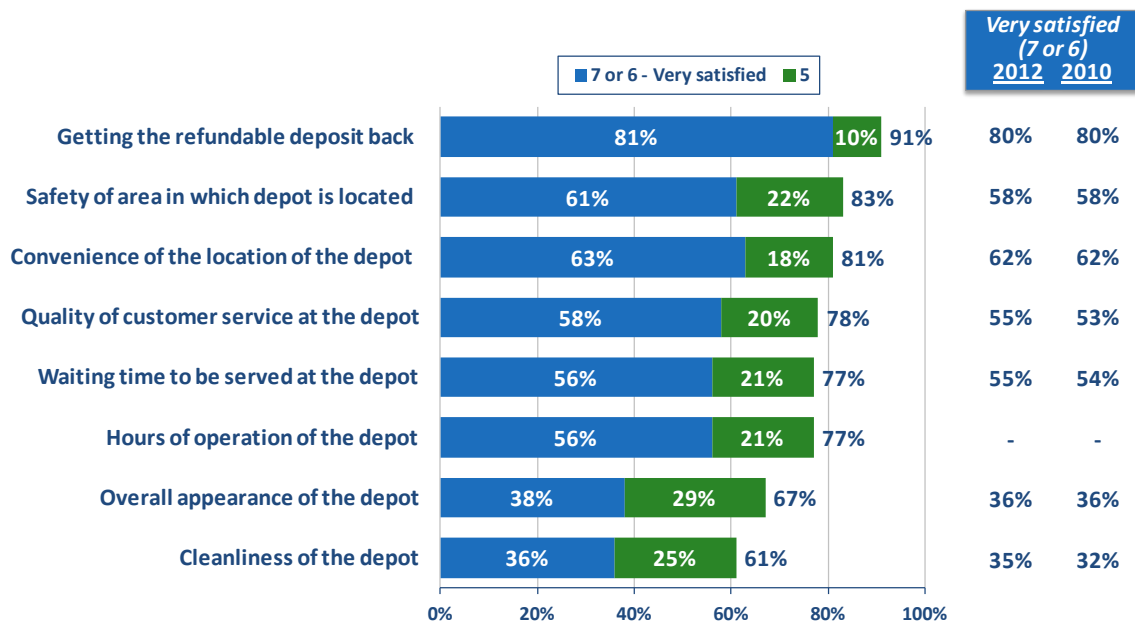


Satisfaction with Bottle Depot Attributes

Satisfaction with most aspects of bottle depots is very high. The majority of Albertans (81%) are very satisfied (i.e. a rating of 7 or 6 on a 7-point scale) with *getting the refundable deposit back*, *convenience of the location* (63%), *safety of the area in which the depot is located* (61%), *customer service* (58%), *waiting time* (56%) and *hours of operation* (56%). Comparatively lower is satisfaction with the *overall appearance* (38% very satisfied) and *cleanliness* (36% very satisfied) of the depot. Findings are consistent with 2012.

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, 2013 n=794 / 2012 n=772 / 2010 n=782)

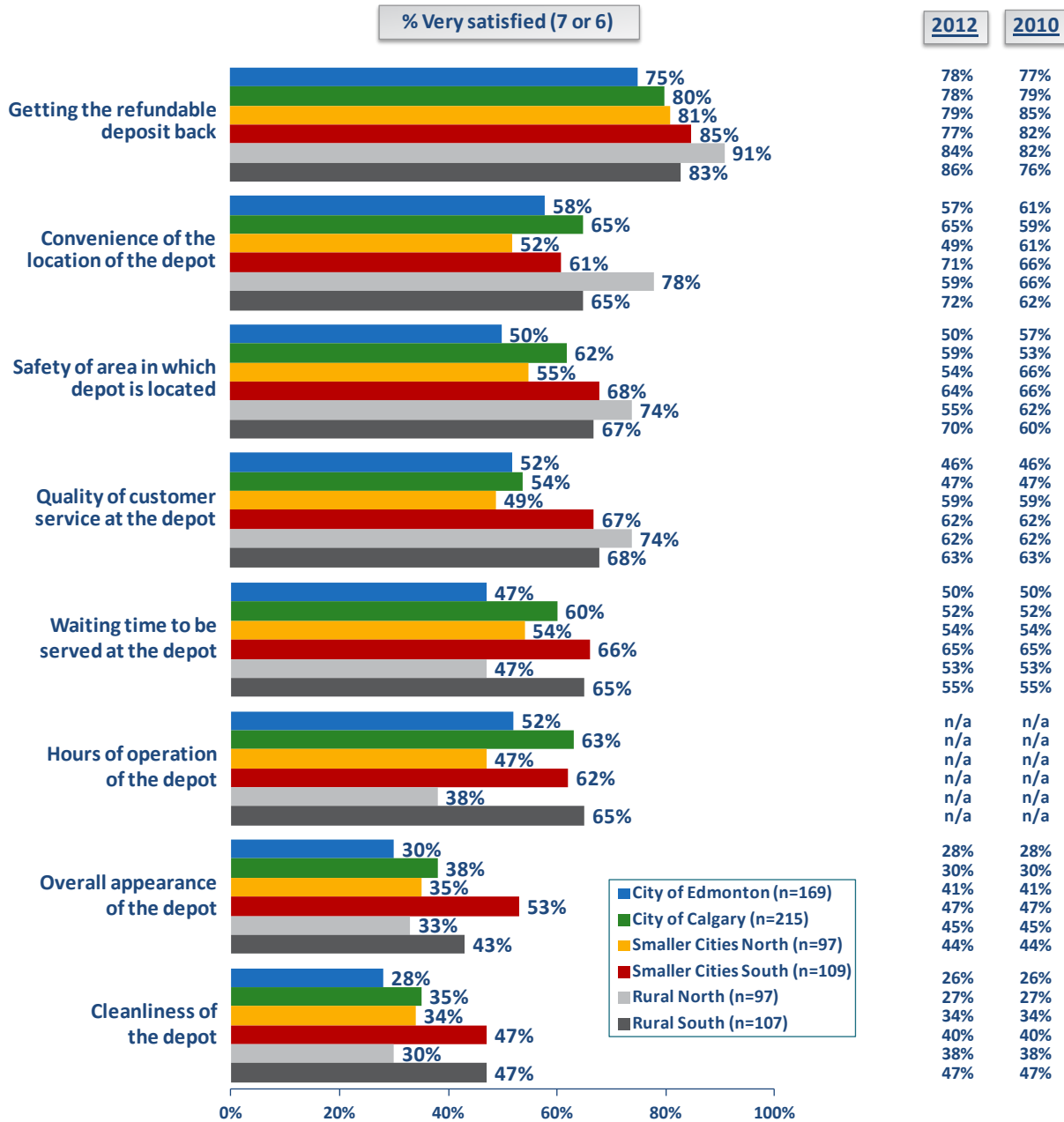


It is notable that satisfaction with most aspects of bottle depots tends to be lowest among younger Albertans aged 18 to 34 years.

When the data are analyzed further, a number of significant regional differences emerge. In general, satisfaction tends to be *lower* among residents of 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, 2013 n=794 / 2012 n=772 / 2010 n=782)



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 South (68%), the Rural South (67%) and Calgary (62%) compared to their counterparts in Edmonton (50%).
- Satisfaction with *customer service* is significantly *higher* among residents the Rural South (68%) and Smaller Cities South (67%) versus residents of Edmonton (52%). Satisfaction in the Rural South is also significantly *higher* compared to Smaller Cities North (49%) and Calgary (54%).
- Satisfaction with the *waiting time to be served* is significantly *higher* among residents of Smaller Cities South (66%), the Rural South (65%) and Calgary (60%) compared to their counterparts in Edmonton (47%).
- Satisfaction with the *hours of operation* is significantly *higher* among residents of Calgary (63%) compared to residents of Edmonton (47%) and Smaller Cities North (47%). Though not a statistically significant difference, satisfaction in the Rural North (38%) is lowest among all regions.
- Satisfaction with the *overall appearance of the depot* is significantly *higher* among residents of Smaller Cities South (53%) and the Rural South (43%) compared to residents of Edmonton (30%).
- Satisfaction with the *cleanliness of the depot* is significantly *higher* among residents of Smaller Cities South (47%) and the Rural South (47%) compared to residents of Edmonton (28%).

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).

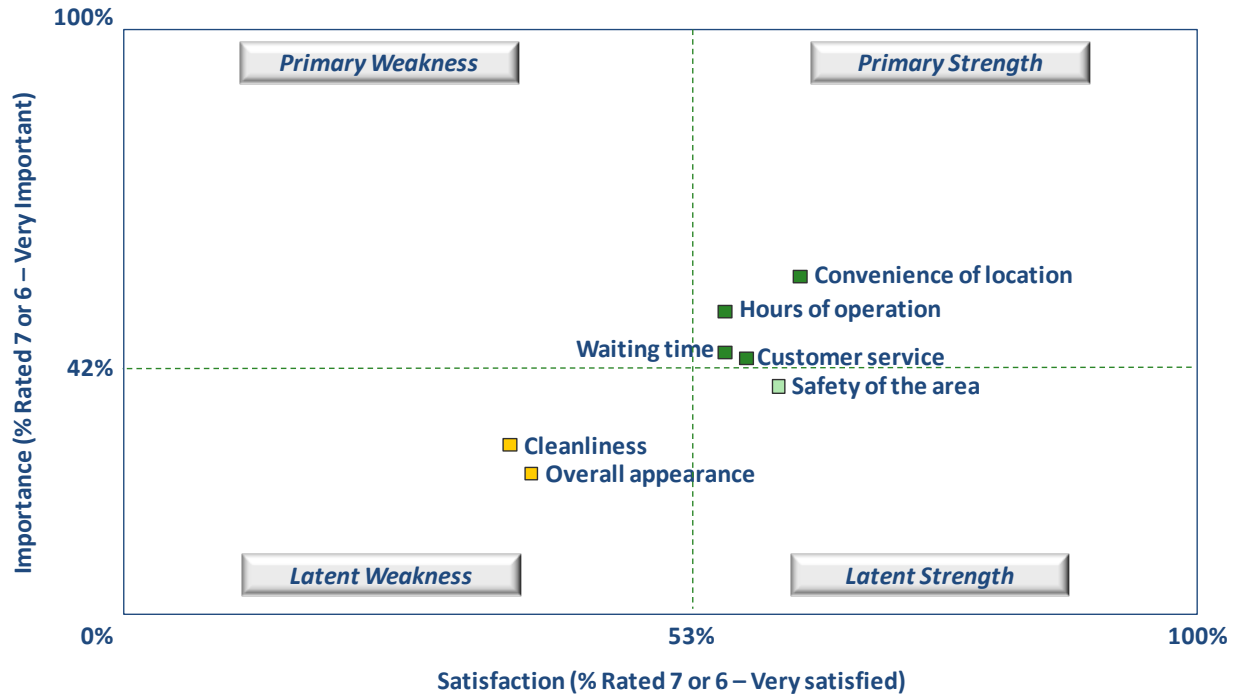
Attributes are located in one of four quadrants:

- 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, customer service, hours of operation and waiting time. Satisfaction with these attributes should be maintained, as slight decreases in satisfaction with hours of operation or waiting time could move them to the primary weakness quadrant. At this time, 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. Safety of the area is a *latent strength* as satisfaction is comparatively higher while importance is comparatively lower.

Importance versus Satisfaction



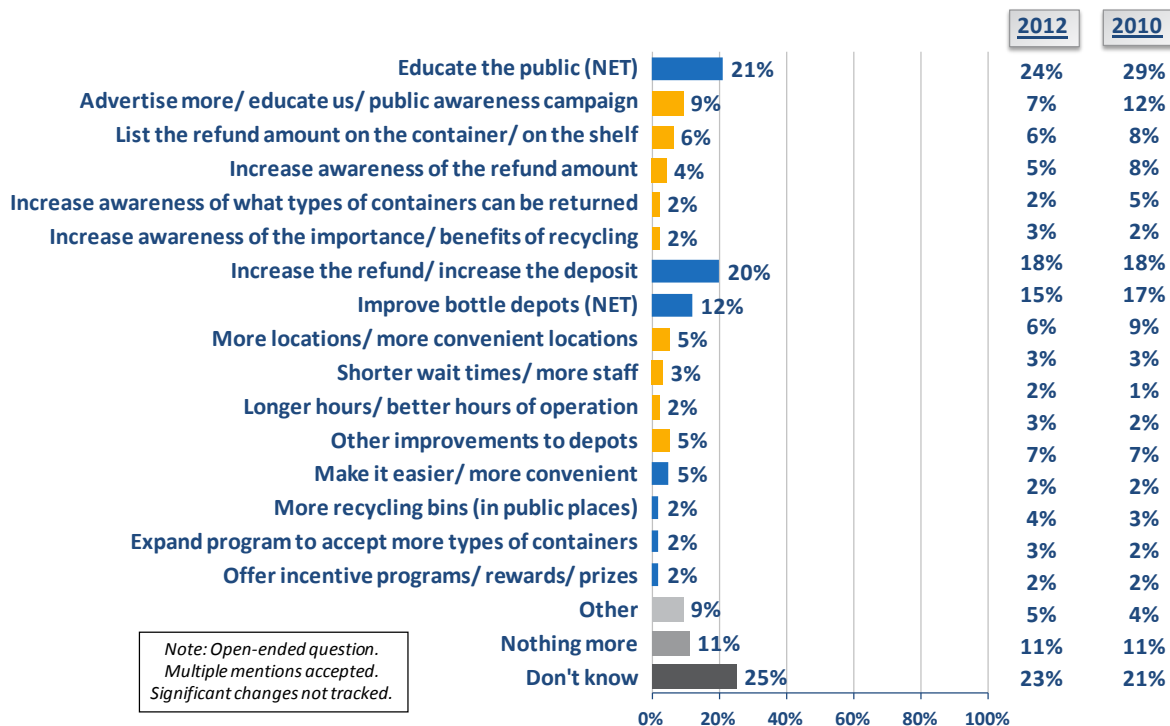
THE OVERALL RETURN RATE

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 (21%), increasing the refundable deposit (20%) and improving various aspects of bottle depots (12%). It is notable that one-quarter (25%) of respondents ‘don’t know’ what could be done while one-in-ten (11%) say ‘nothing more’.

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)



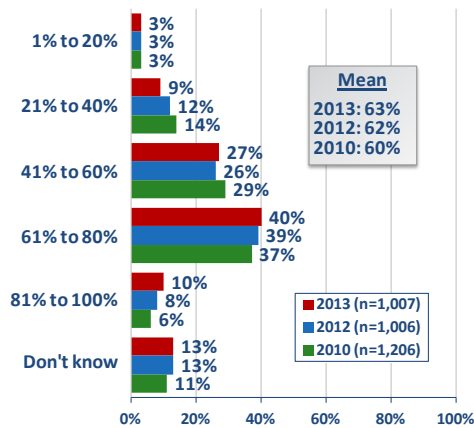
Awareness of the Overall Return Rate for Beverage Containers

As might be expected, Albertans are not knowledgeable about the overall rate of return for beverage containers. When asked, two-thirds (67%) guess it is in the 41% to 80% range, while just 10% say 81% or higher. Findings are unchanged from 2012.

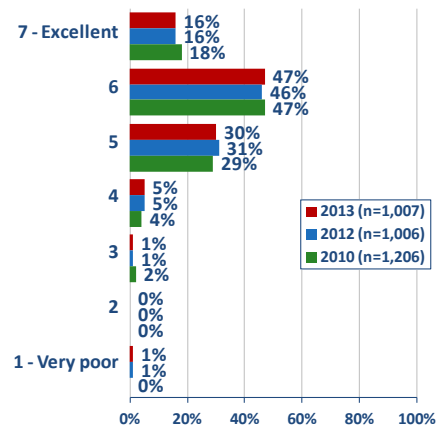
When told the actual return rate in 2012 was 83%, 63% deem it as being excellent (rating of 6 or 7), on par with 2012 (62%).

What is the return rate for beverage containers?

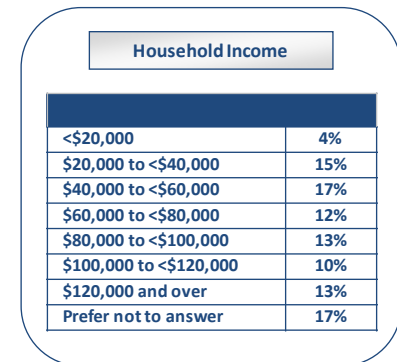
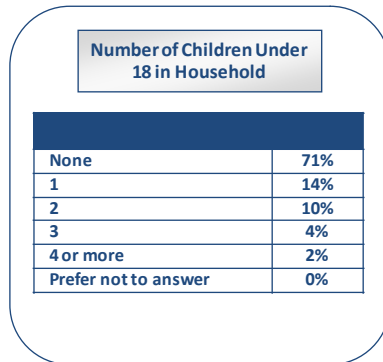
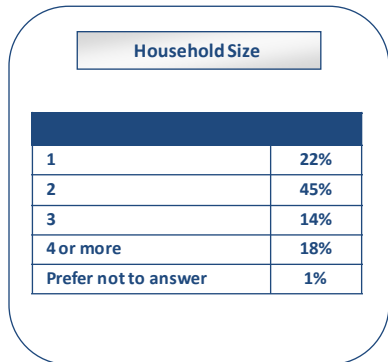
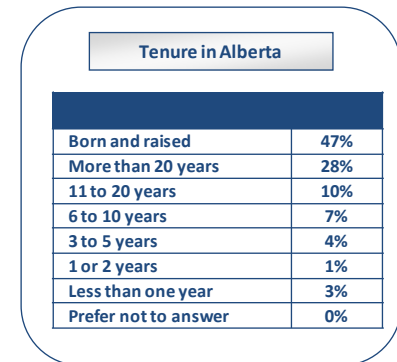
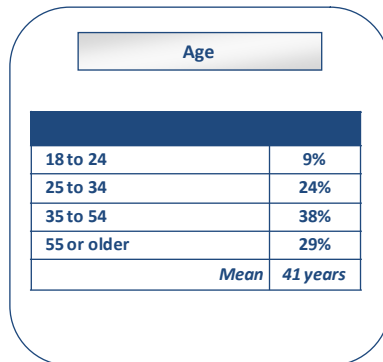
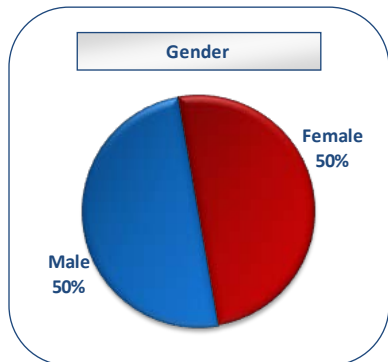
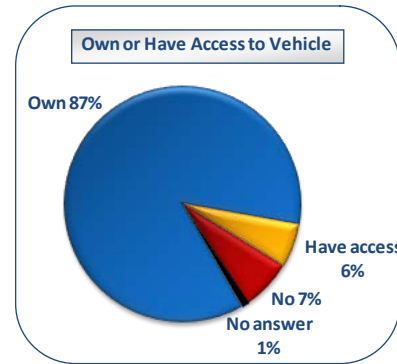
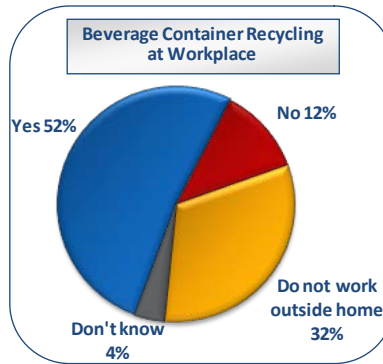
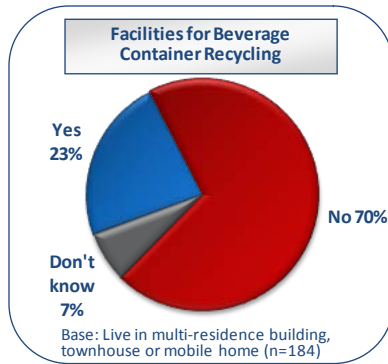
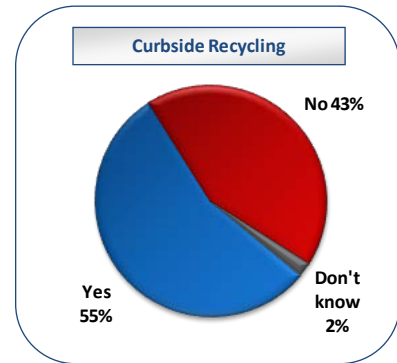
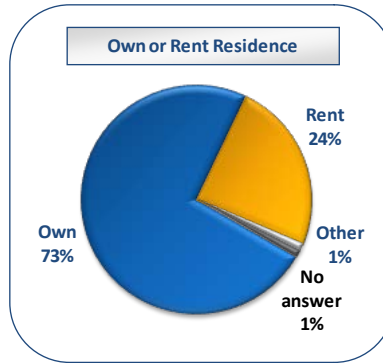
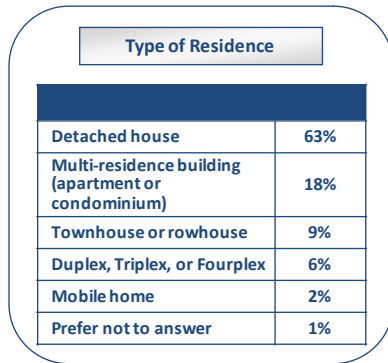
Q18. What percentage of beverage containers sold in Alberta do you think are recycled or returned to depots every year?
(Base: All respondents, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



Q19. In 2012, the overall return rate for beverage containers in Alberta was 83%. Would you say this is...?
(Base: All respondents, 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)



RESPONDENT CHARACTERISTICS



APPENDIX A: SURVEY QUESTIONNAIRE

**BEVERAGE CONTAINER MANAGEMENT BOARD
2013 ONLINE SURVEY
Final Questionnaire
February 27, 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 one response only 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 Q6A, 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
On a sign/poster on the wall
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

The hours of operation 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

The hours of operation 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

16.1 Do you typically go to the bottle depot you use most often from home, from work or from another location?

Please select one response only

Home

Work

Another location (specify)

Don't know

16.2 Are you satisfied with the hours of operation of the bottle depot you use most often or would you prefer longer hours?

Please select all that apply

Satisfied with the current hours

Would like it to open earlier (Please specify time)

Would like it to stay open later (Please specify time)

Don't know

16A. If it was possible to have a bottle depot closer to where you live – for example, near a local convenience store or grocery store – 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. ASK Q16C IF YES IN Q16A]

16B. Other than there being no need (i.e. the existing depot is close/ convenient enough), do you see any disadvantages of having a bottle depot closer to where you live?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

16C. What do you see as the advantages of having a bottle depot closer to where you live?

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 2012, 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!