



Beverage Container Recycling – A Survey of Albertans 2018

Final Report

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March 2018

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SUMMARY OF KEY FINDINGS

Ipsos 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 2016 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 (roughly 90% or more) – the exceptions being juice cans (56%) and foil juice pouches (47%).

- Further, the percentage of Albertans who say that juice cans *cannot* be returned for a refund is up 6 percentage points (from 26% in 2016 to 32% in 2018).
- Similarly, more Albertans say foil juice pouches *cannot* be redeemed (33% in 2018 vs. 24% in 2016).

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 at 35% (one should note that it is also among the least purchased beverage containers).

- Also, more Albertans now say bag-in-a-box wine *cannot* be returned (29% in 2018 vs. 23% in 2016).

Awareness that dairy containers can be returned for a refund remains high and has stabilized after significant gains from 2010 to 2013. While awareness that most types of dairy containers can be returned for a refund is now at the 70% mark or higher, awareness of the refundable deposit on yogurt drinks (50%) and liquid meal replacements (39%) continue to lag.

- Further, the percentage who say these containers *cannot* be returned to a depot has increased significantly from 2016 (5 percentage points for yogurt drinks and 7 percentage points for liquid meal replacements).

Relatively few Albertans believe that three types of non-redeemable containers can be returned for a refund.

- Roughly one-quarter (26%) of Albertans believe soup cartons can be returned to a bottle depot for a refund. Though still a notable minority, this is down 5 percentage points from 2016 (31%), and further, the percentage who say soup cartons are *not* redeemable has increased 12 percentage points (from 46% in 2016 to 58% in 2018).
- Just 17% think olive oil bottles can be redeemed and 9% say plastic windshield wiper fluid containers can be redeemed. Still, one should note that about one-in-five say they are not sure.

Recycling and Redemption of Beverage Containers

Reported recycling of beverage containers in the past six months is near universal (98%), while redemption is 88%.

Among Albertans who have purchased each type of redeemable beverage container, reported incidence of recycling and/or redemption tops the 80% mark for all categories, while reported incidence of redemption is at 75% or higher for all but six types of beverage containers.

- Redeemable container types that less than 75% of purchasers report returning to a bottle depot are juice cans more than 1 litre (62%), bag-in-a-box wine (60%), milk tetra paks (72%), single serve yogurt drinks (72%), liquid meal replacements (67%), and International Delight (45%).
- It is notable that fewer Albertans who have purchased non-redeemable soup cartons say they have returned them for a refund – 22% in 2018 versus 33% in 2016.

Frequency of Returning Lower Return Rate Containers

Considering five container types with lower return rates, reported redemption is highest for juice cartons and lowest for International Delight. Among Albertans who have purchased each item in the past six months, 88% say they redeem *juice cartons more than 1 litre* in size ‘always’ or ‘most of the time’, while this drops slightly for *milk and cream* containers (82%) and *juice cans more than 1 litre* in size (79%), is notably lower for *bag-in-a-box wine* (59%), and lowest for *International Delight* (44%).

Lack of awareness that the containers are redeemable, and simply recycling them instead, are the main reasons for not returning these types of containers to a bottle depot more often.

Awareness of the Refundable Deposit for Beverage Containers

Roughly half of Albertans can cite the refundable deposit for beverage containers while one-quarter 'don't know.' Just over half (55%) of Albertans know the refundable deposit for beverage containers that are one litre or less, while 49% 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 a sizeable percentage of Albertans currently unaware.

- Among those unable to cite the refundable deposit value for containers one litre or less in size, 40% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 56% say it would make no difference.
- When it comes to containers more than one litre in size, knowing the correct deposit would have an even bigger impact. Just under half (47%) say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 49% say it would make no difference.

One-quarter of Albertans – down from 2016 – say they have seen information at retail stores that identifies the refundable deposit on beverage containers.

- In 2018, 24% of Albertans say they have seen information about the refundable deposit – this is a significant 7 percentage point decrease from 31% in 2016. Two-in-ten (20%, down 7 points from 27% in 2016) recall seeing information at a grocery store, 11% at a liquor store, 6% at a convenience store, and 5% at a gas station.
- Cash register receipts (69%) are the most common channel – up a significant 11 percentage points from 2016), followed by the shelf where the product is placed (22%), and on a sign or poster on the wall (14%, down 7 points from 21% in 2016).

Bottle Depots

While half of Albertans are aware of the regulation of bottle depots, the majority say it is important. Half (49%) of Albertans say they were aware that all bottle depots in Alberta are regulated by a central body. When asked how important regulation is to them personally, eight-in-ten (80%) say it is 'important' (a rating of 5, 6 or 7 on a 7-point scale) – further, a majority (60%) say it is 'very important' (a rating of 6 or 7).

In 2018, more than half (52%) Albertans say they have seen the Depot logo – a significant 14 percentage point increase from 2016 (38%).

Specific aspects of bottle depots are not cited as key barriers to use among non-users or less frequent users.

- Among the small percentage (7%) of Albertans who say their household has *never* returned beverage containers to a depot, most (62%) indicate they **recycle the containers instead** – 24% “*donate to charity*”, 21% “*don’t have enough so recycle instead*,” and 14% “*put in blue box*.” **Inconvenience** (42%) is also a key issue – 24% “*too much trouble*” (21%), 11% “*too time consuming*,” and 6% “*no room to store them*.” Just 12% cite issues with depots themselves, with 8% saying the “*depot is too far away*.”
- The predominant reasons for visiting a bottle depot a couple of times a year or less are also recycling instead (63%) and inconvenience (54%) – with 38% specifically saying they “*prefer to do it in one big trip or do not like making multiple trips*.”

For Albertans who have visited a depot in the past six months, **the most important factor when deciding which bottle depot to go to is that the refundable deposit amount you get back is accurate** (73% very important – i.e. a rating of 7 or 6 on a 7-point scale), while the second most important factor is **convenience of the location** (67% very important).

- In the next tier are **waiting time** (55% very important), **hours of operation** (53% very important), **customer service** (50% very important), and **safety** of the depot location (49% very important).
- Comparatively less important are **cleanliness** (40% very important), having a **computerized system** (39% very important), **overall appearance** (30% very important), and **automation** (21% very important).

Satisfaction with most aspects of bottle depots is high. Looking at very satisfied ratings (i.e. a rating of 7 or 6 on a 7-point scale), the majority of Albertans are very satisfied with the **convenience of the location** (66%), **accuracy of the refund** (66%), **hours of operation** (61%), **safety** of the area in which the depot is located (61%), **waiting time** (59%) and **customer service** (57%). Comparatively lower is satisfaction with having a **computerized system** (49%), the **overall appearance** (44%) and **cleanliness** (40%) of the depot, and the depot being **highly automated** (31%).

In general, satisfaction tends to be *higher* in Calgary and Smaller Cities South and *lower* among residents of Smaller Cities North.

Opportunities for Increasing the Overall Return Rate

When asked *what could the BCMB do to increase the number of empty beverage containers that you return to bottle depots* – other than increasing the refund or deposit – the majority of Albertans say ‘*nothing*’ (49%) or ‘*don’t know*’ (24%). The most frequent suggestions are **expanding the program to accept more types of containers** (10%), **improving various aspects of bottle depots** (9%), and **educating the public** (8%).

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 Parks. The BCMB's mandate is to regulate and enhance a leading beverage container system that protects Alberta's environment, with a goal of sustaining 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.

The overall return rate for beverage containers has been steadily rising – from 77% in 2008 to 83.3% in 2014 to 85.7% in 2016, the highest achieved to date. In order to meet the BCMB's goal of "incurring the highest possible return of containers while minimizing the impact of the system on the environment," 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, 2013, 2014, 2016 and again in 2018. Key research objectives of the 2018 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 2016.

Methodology

Between January 22nd and 31st, 2018, Ipsos conducted a total of 1,006 online interviews with a representative sample of Albertans aged 18 years and older. The median interview length was 15 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 2016 Canadian Census data.

The precision of online surveys is measured using a credibility interval. With a sample of 1,006, results are considered accurate to within ± 3.5 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	Number of interviews (n)	Maximum margin of error
City of Edmonton	212	$\pm 7.7\%$
City of Calgary	290	$\pm 6.6\%$
Smaller Cities North ¹	125	$\pm 10.0\%$
Smaller Cities South ²	127	$\pm 9.9\%$
Rural North	126	$\pm 10.0\%$
Rural South	126	$\pm 10.0\%$
TOTAL	1,006	$\pm 3.5\%$
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.

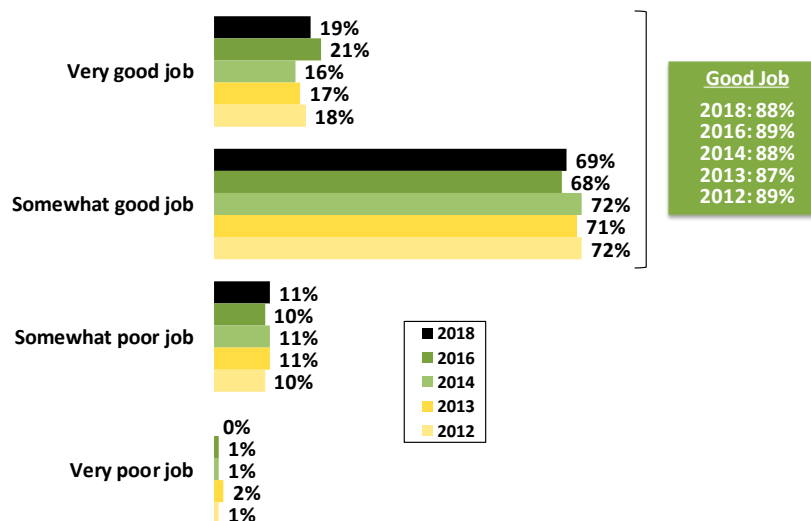
ENVIRONMENTAL BEHAVIOURS

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 (69% 'somewhat good') recognize that they could be doing more. That said, one-in-five (19%) say they do a 'very good' job, consistent with 2016.

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, 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)

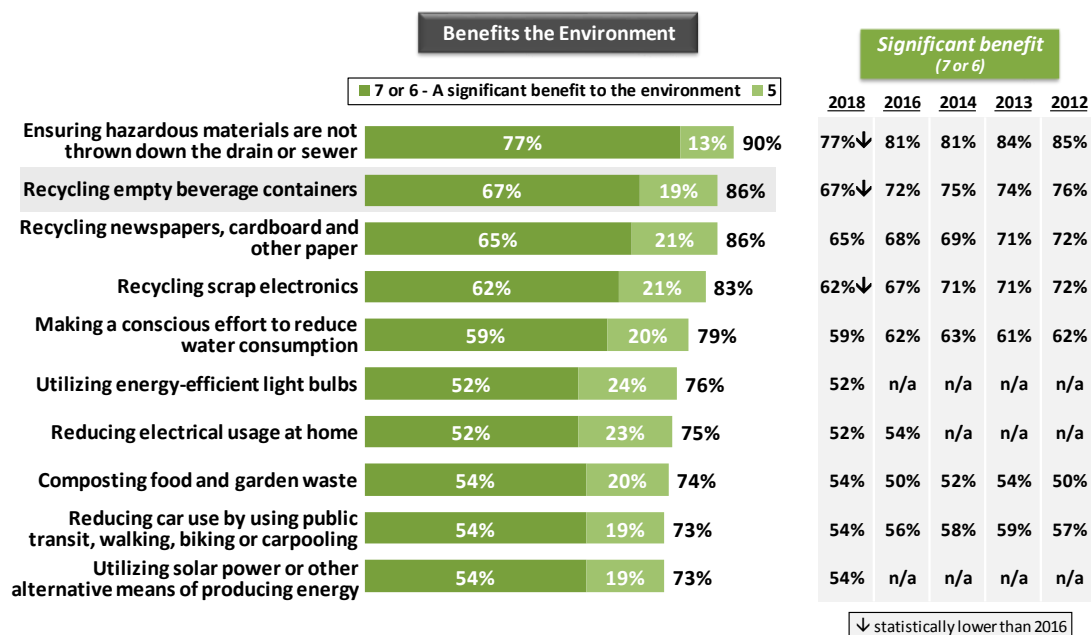
Perceived Impact of Environmental Behaviours

Albertans clearly recognize the importance of recycling empty beverage containers.

Just under nine-in-ten (86%) Albertans say *recycling empty beverage containers* benefits the environment. Further, two-thirds (67%) say it 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* (77%), but on par with *recycling newspapers, cardboard and other paper* (65%), and ahead of *recycling scrap electronics* (62%) as well as six other activities evaluated.

It is interesting that comparatively fewer Albertans say three activities related to reducing energy use have a significant benefit to the environment – *utilizing solar power or other alternative means of producing energy* (54%), *using energy-efficient lightbulbs* (52%), and *reducing electrical usage at home* (52%).

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, 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006)

Though still strong, one should note that 'significant' benefit ratings have declined from 2016 for *ensuring hazardous materials are not thrown down the drain or sewer* (down 4 percentage points), *recycling empty beverage containers* (down 5 percentage points), and *recycling scrap electronics* (down 5 percentage points).

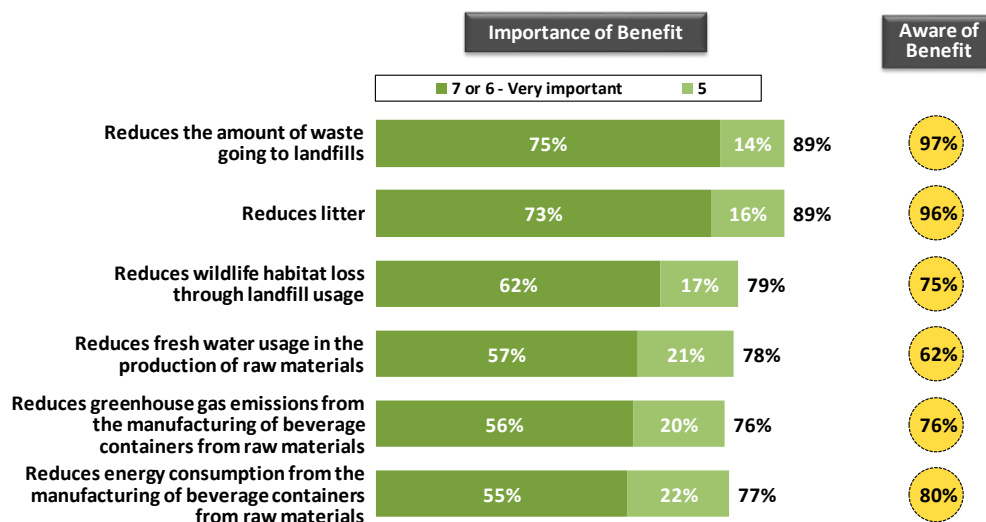
Awareness and Importance of Environmental Benefits

Reducing litter and reducing the amount of waste going to landfills are key drivers for recycling empty beverage containers.

Albertans were read six environmental benefits of recycling beverage containers. For each benefit, they were asked if they knew of the benefit and how important the reason is for them personally to recycle beverage containers. The majority say they were aware of all six benefits, with near universal awareness of *reduces litter* (97%) and *reduces the amount of waste going to landfills* (96%); lowest is awareness of that it *reduces fresh water usage in the production of raw materials* (62%).

As far as personal motivators for recycling beverage containers, *reducing waste going to landfills* (75% 'very important' – rating of 7 or 6) and *litter* (73% 'very important') emerge as key drivers, with the other four benefits relatively even and comparatively less important.

Did you know of these environmental benefits; and, how important is each as a reason for recycling beverage containers?



Q2A/B. As you may know, recycling beverage containers can have a number of environmental benefits. For each benefit listed below, please indicate: 1) If you knew of this benefit prior to now, and, 2) For you personally, how important is this reason for recycling beverage containers. (Base: All respondents, n=1,006)

BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS

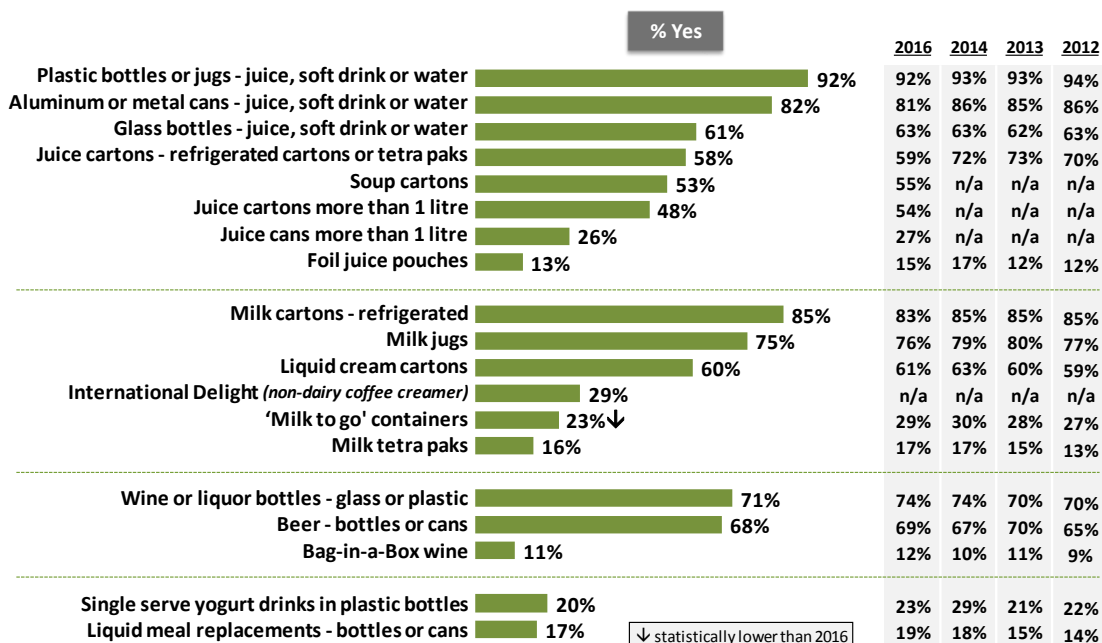
Past Six Months Purchase of Beverage Containers

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

Past six months purchase of juice cans more than 1 litre, foil juice pouches, International Delight, 'milk to go' containers, milk tetra paks, bag-in-a-box wine, single serve yogurt drinks, and liquid meal replacements, is markedly lower than other types of beverage containers. The same pattern held true in 2016.

Down significantly is reported purchase of milk to go containers (23% 2018 vs. 29% 2016).

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, 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006)

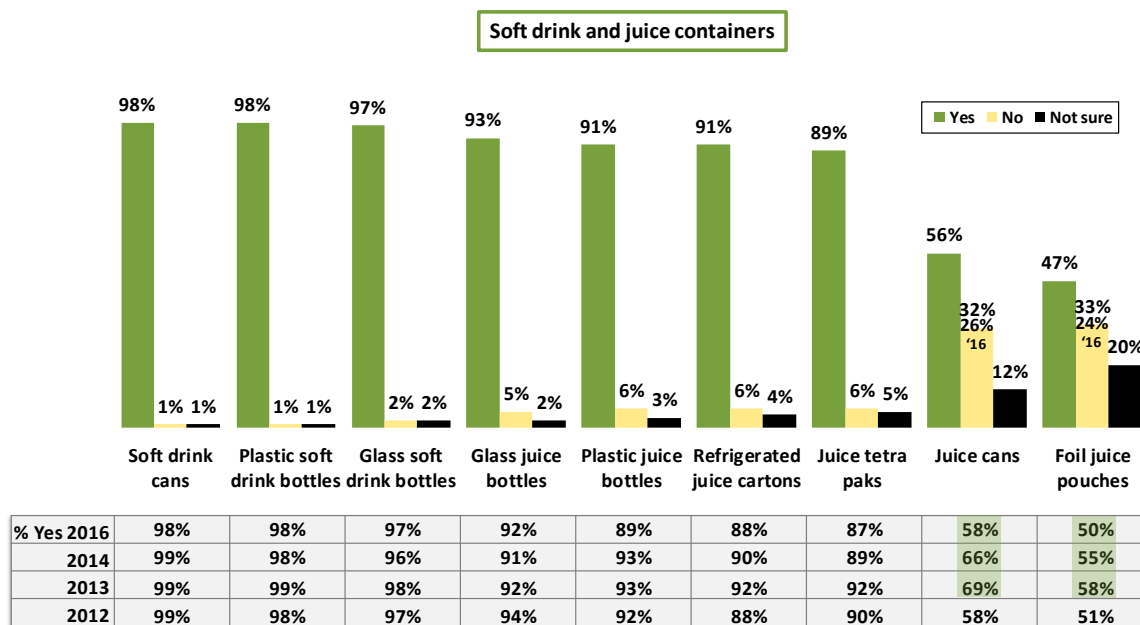
Awareness of Refundable Beverage Containers

Awareness that juice cans and foil juice pouches can be returned for a refund has declined.

Awareness that most types of soft drink and juice containers can be returned for a refund is extremely high (roughly 90% or more) – the exceptions being juice cans (56%) and foil juice pouches (47%).

Further, the percentage of Albertans who say that juice cans cannot be returned for a refund is up 6 percentage points (from 26% in 2016 to 32% in 2018); the percentage who say they are redeemable (56%) is consistent with 2016, though this has declined steadily since 2013. Similarly, more Albertans say foil juice pouches cannot be redeemed (33% in 2018 vs. 24% in 2016); again, the proportion who say they are redeemable had declined over the past five years.

What can be returned for a refund?



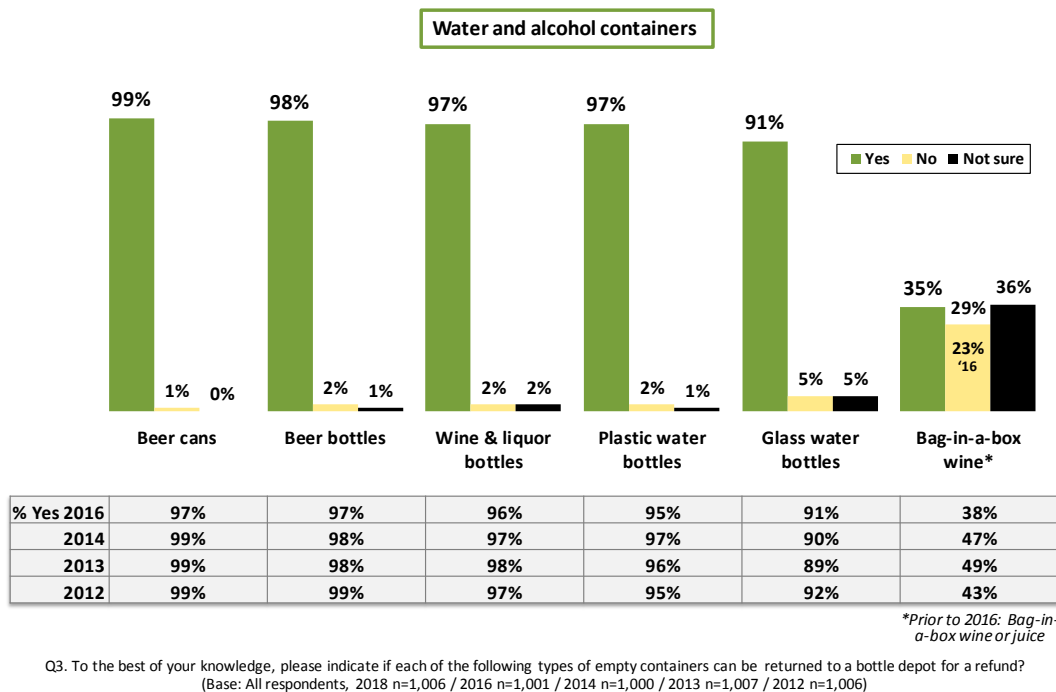
Q3. To the best of your knowledge, please indicate if each of the following types of empty containers can be returned to a bottle depot for a refund?
 (Base: All respondents, 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006)

Awareness that most types of soft drink and juice containers can be returned for a refund is significantly *lower* among those who are newcomers to the province within the past 5 years compared with residents who have lived in Alberta for more than ten years. Awareness is particularly low for juice cartons (73%), juice tetra paks (65%), and foil juice pouches (25%).

Awareness also tends to be lower among younger Albertans aged 18 to 34 years.

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 at 35% (one should note that it is also among the least purchased beverage containers). Though the percentage who say bag-in-a-box wine is redeemable is consistent with 2016, more Albertans now say bag-in-a-box wine cannot be returned (29% in 2018 vs. 23% in 2016).

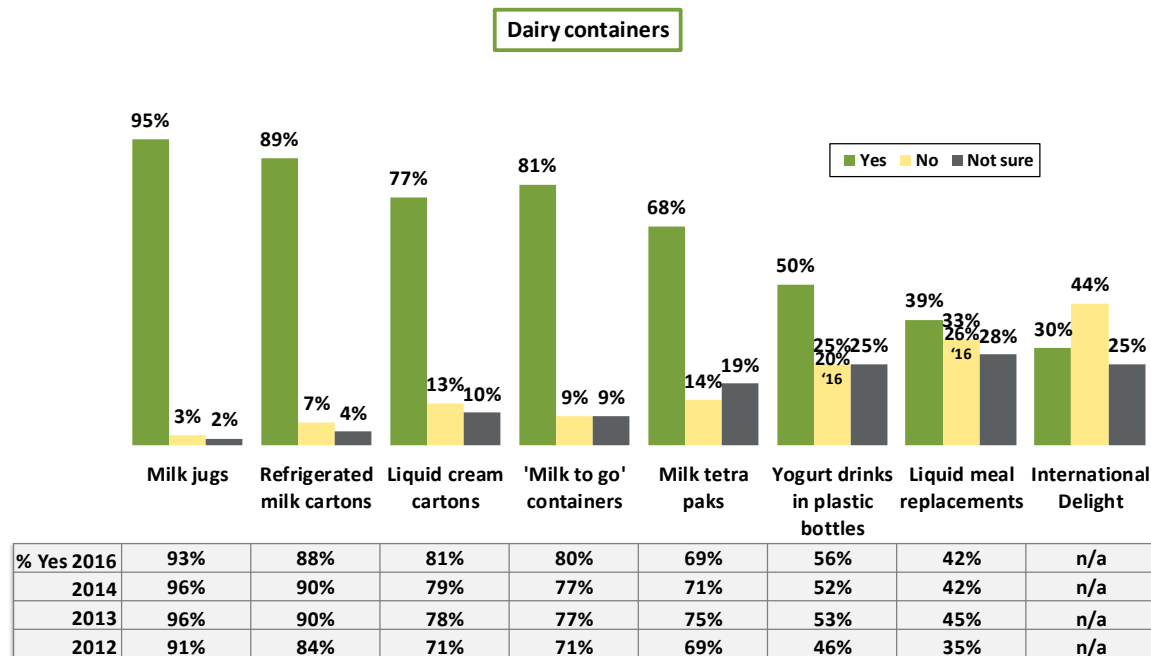
What can be returned for a refund?



Awareness that most dairy containers can be returned for a refund remains high – there have been no significant gains in the past five years.

While awareness that most types of dairy containers can be returned for a refund is at the 70% mark or higher, awareness of the refundable deposit on yogurt drinks (50%) and liquid meal replacements (39%) continue to lag. Further, the percentage who say these containers cannot be returned to a depot has increased significantly from 2016 (5 percentage points for yogurt drinks and 7 percentage points for liquid meal replacements).

What can be returned for a refund?



Q3. To the best of your knowledge, please indicate if each of the following types of empty containers can be returned to a bottle depot for a refund?
 (Base: All respondents, 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006)

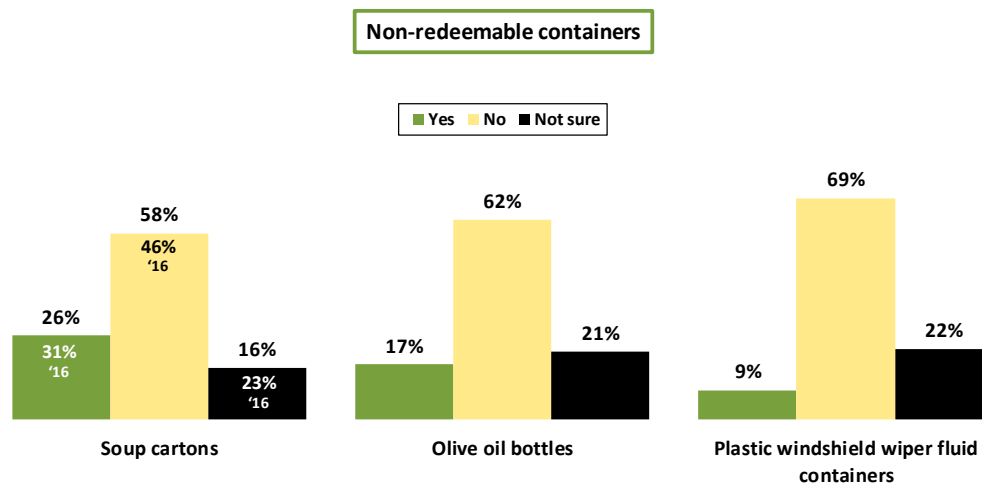
Awareness that several types of dairy containers can be returned for a refund is significantly *lower* among those who are newcomers to the province within the past 5 years; particularly, milk cartons (71%) and liquid cream cartons (57%).

Relatively few Albertans believe that three types of non-redeemable containers can be returned for a refund.

Roughly one-quarter (26%) of Albertans believe soup cartons can be returned to a bottle depot for a refund. Though still a notable minority, this is down 5 percentage points from 2016 (31%), and further, the percentage who say soup cartons are not redeemable has increased 12 percentage points (from 46% in 2016 to 58% in 2018).

Just 17% think olive oil bottles can be redeemed and 9% say plastic windshield wiper fluid containers can be redeemed. Still, one should note that about one-in-five say they are not sure.

What can be returned for a refund?



Q3. To the best of your knowledge, please indicate if each of the following types of empty containers can be returned to a bottle depot for a refund?
 (Base: All respondents, 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006)

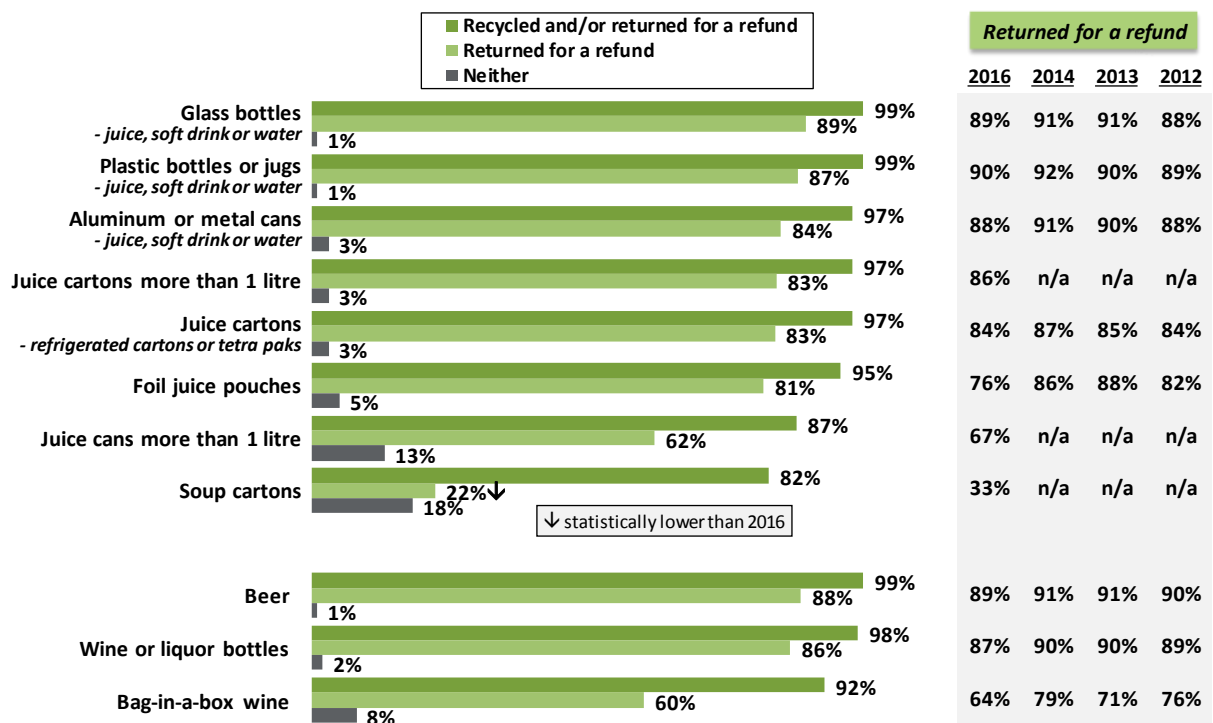
Incidence of Beverage Container Recycling and Redemption by Type of Container

Among Albertans who have purchased each type of redeemable beverage container, reported incidence of recycling and/or redemption tops the 80% mark for all categories, while reported incidence of redemption is at 75% or higher for all but six types of beverage containers.

Redeemable container types that less than 75% of purchasers report returning to a bottle depot are juice cans more than 1 litre (62%), bag-in-a-box wine (60%), milk tetra paks (72%), single serve yogurt drinks (72%), liquid meal replacements (67%), and International Delight (45%).

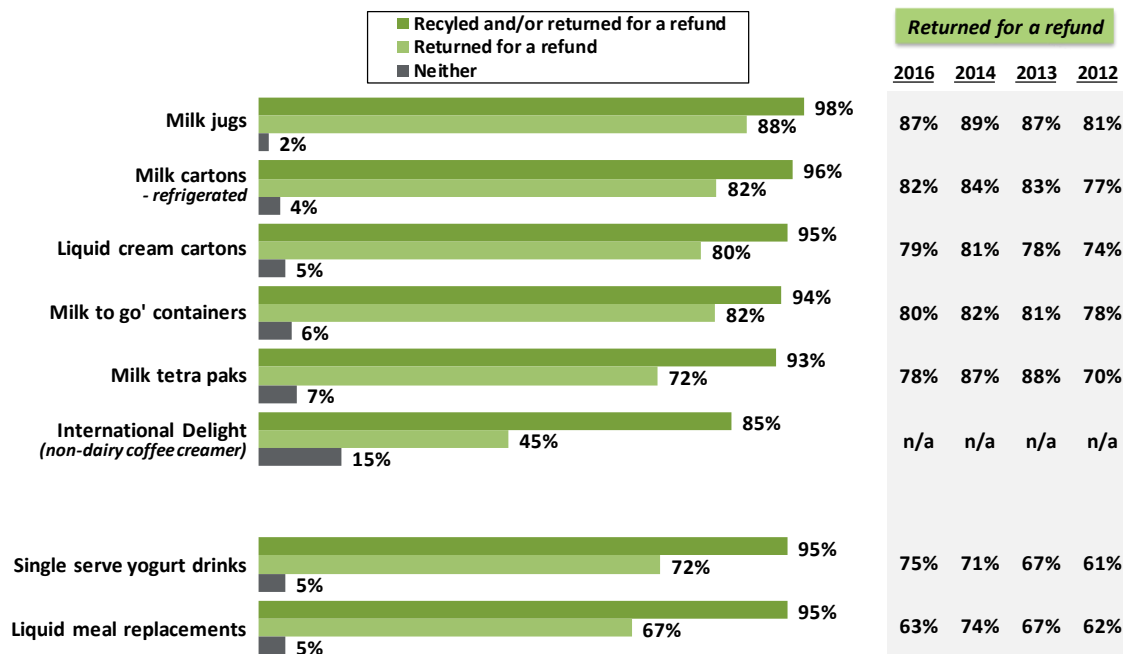
It is notable that fewer Albertans who have purchased non-redeemable soup cartons say they have returned them for a refund – 22% in 2018 versus 33% in 2016.

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)

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)

As awareness of what types of containers can be returned for a refund tends to be lower among those who are newcomers to Alberta within the past 5 years, it is not surprising that redemption is also significantly *lower* for many container types. Most notable are redemption of juice cans (36% vs. 62% overall), juice cartons (59% vs. 83% overall), liquid cream cartons (54% vs. 80% overall), and single serve yogurt drinks (49% vs. 72% overall).

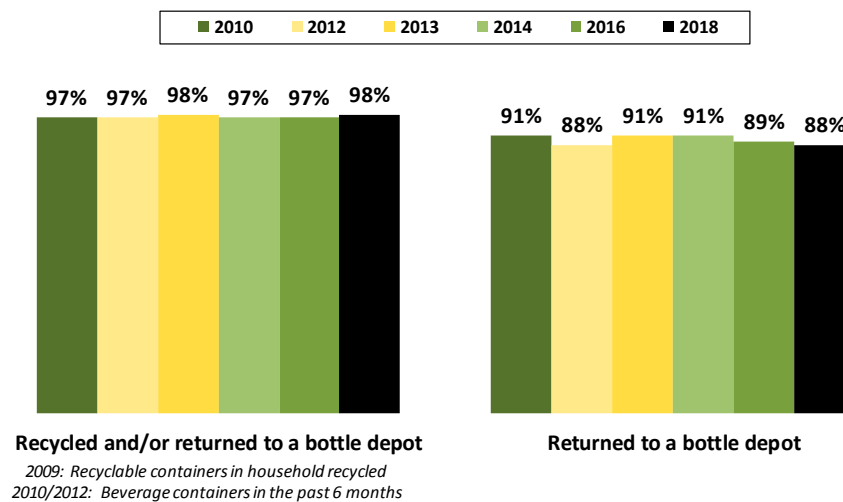
Redemption is also significantly lower among Albertans aged 18 to 34 years for almost all container types.

It is also noteworthy that residents with curbside recycling tend to redeem containers less often than those who do not have curbside pick-up.

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 roughly nine-in-ten (88%) indicate they have returned beverage containers to a bottle depot in the same time frame. Findings are consistent with 2016.

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



(Base: All respondents, 2018, n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006 / 2010 n=1,206)

Reported incidence of redemption is significantly *lower* in Calgary (83%) compared to Smaller Cities South (95%, also higher than 86% in Edmonton), the Rural South (92%), the Rural North (94%), and Smaller Cities North (91%).

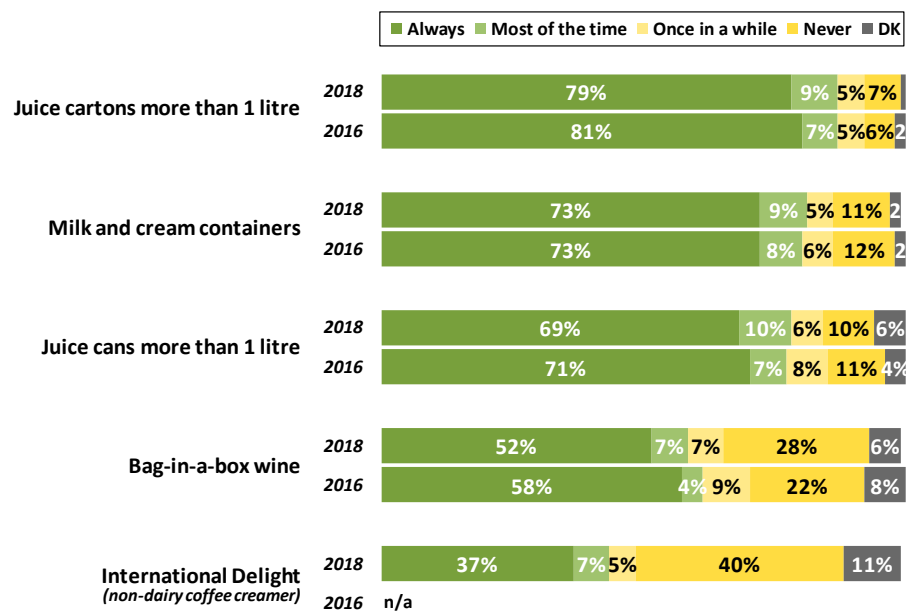
It is also *lower* among those aged 25 to 34 years (80% vs. 93% 18 to 24, 91% 35 to 54 and 90% 55 or older), and residents who have lived in Alberta for five years or less (74% vs. 90% more than 5 years).

Frequency of Returning Lower Return Rate Containers

Among five container types with lower return rates, reported redemption is highest for juice cartons and lowest for International Delight.

Among Albertans who have purchased each item in the past six months, 88% say they redeem *juice cartons more than 1 litre* in size 'always' or 'most of the time', while this drops slightly for *milk and cream containers* (82%) and *juice cans more than 1 litre* in size (79%), is notably lower for *bag-in-a-box wine* (59%), and lowest for *International Delight* (44%).

How often do you return these items to a bottle depot?



Q6ANEW. How often does your household return each of the following to a bottle depot for a refund?
(Base: Purchased the item in the past 6 months)

Lack of awareness that the containers are redeemable, and simply recycling them instead, are the main reasons for not returning these types of containers to a bottle depot more often.

Past six months purchasers who said they return each type of container to a depot 'once in a while' or 'never', were asked why they do not return them more often. The primary reason is lack of awareness for both International Delight (73%) and bag-in-a-box wine (65%).

In the case of milk and cream containers, juice cartons and juice cans more than 1 litre in size, lack of awareness as well as *recycle them instead* are common explanations, though inconvenience is also a key factor (*too much trouble, depot is too far away, too time consuming*).

Why don't you return them to a bottle depot more often?

	Milk & cream containers (n=153)	International Delight (n=136)	Juice cartons >1L (n=55*)	Juice cans >1L (n=37*)	Bag-in-a-Box wine (n=38*)
Didn't know you could return them to a bottle depot for a refund	37%	73%	23%	31%	65%
Recycle them instead	26%	8%	25%	17%	11%
Depot is too far away	6%	1%	13%	13%	5%
Too much trouble/ don't want to bother	13%	6%	15%	18%	6%
Too time consuming	5%	2%	6%	5%	3%
Donate to charity	4%	1%	9%	3%	5%
Do not buy/ do not buy very often	2%	1%	-	3%	3%
Depot doesn't accept them/ no refund provided	1%	5%	-	2%	-
Other	4%	1%	2%	5%	3%
Don't know	3%	3%	8%	5%	-

***Caution: Very small base size**

Q6BNEW. Why doesn't your household return these items/return them more often to a bottle depot for a refund?
(Base: Past 6 months purchase but redeem once in a while or never)

Awareness of Refundable Deposit for Beverage Containers

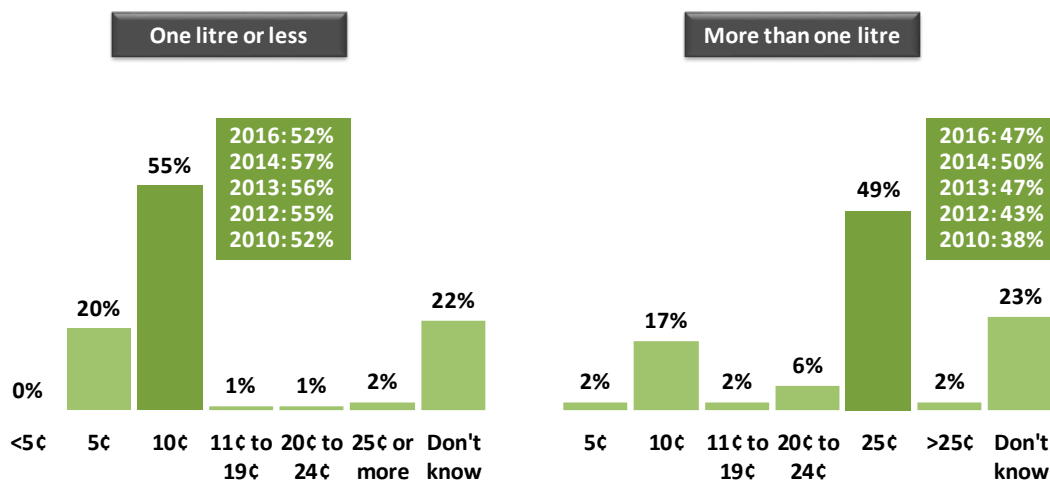
Roughly half of Albertans can cite the refundable deposit for beverage containers while one-quarter 'don't know.'

Just over half (55%) of Albertans correctly specify 10 cents as the refundable deposit on beverage containers that are *one litre or less*, while 20% say 5 cents and 22% 'don't know'. Awareness is 62% among those who have personally returned beverage containers to a bottle depot versus 33% among those who have not.

There is less clarity regarding the refundable deposit for containers *more than one litre* in size. Half (49%) correctly say 25 cents, while roughly 27% cite a refund of less than 25 cents and 23% 'don't know'. Awareness is 57% among those who have personally returned beverage containers versus 28% among those who have not.

Findings are consistent with 2016.

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 refundable deposit is *lower* among Albertans aged 18 to 34.

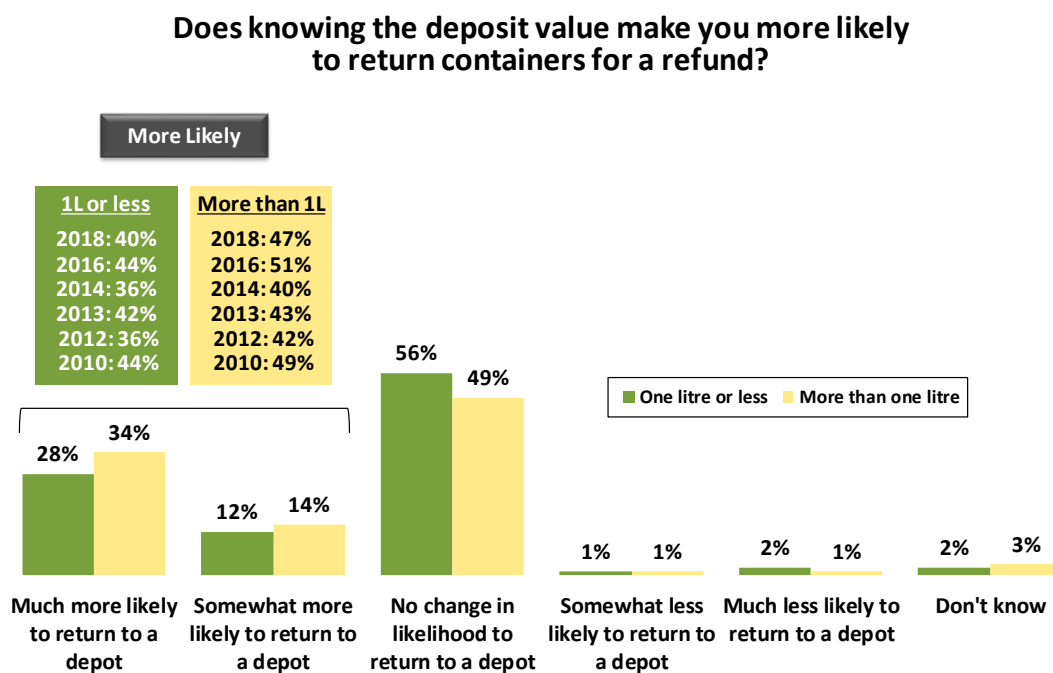
Perceived Impact of Knowing the Refundable Deposit for Beverage Containers

Knowing the correct deposit value would have a positive impact on redemption for a sizeable percentage of Albertans currently unaware.

Among those unable to cite the refundable deposit value for containers one litre or less in size, 40% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 56% say it would make no difference.

When it comes to containers more than one litre in size, knowing the correct deposit would have an even bigger impact. Just under half (47%) say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 49% say it would make no difference.

Findings are statistically consistent with 2016.



Q8a/8b. In fact, the refundable deposit for all beverage containers that are one litre or less in size is 10¢/more than one litre in size is 25¢. Knowing this would you be more likely or less likely to return your empty beverage containers to a bottle depot, or would it have no change on your behaviour?
 (Base: Unaware of deposit value, 10¢: n=443 / 25¢: n=502)

When the data are analyzed by region, it is notable that the reported impact of knowing the deposit value is *highest* among residents of the Rural South – 56% ‘more likely’ for containers 1 litre or less in size and 59% ‘more likely’ for containers more than one litre in size.

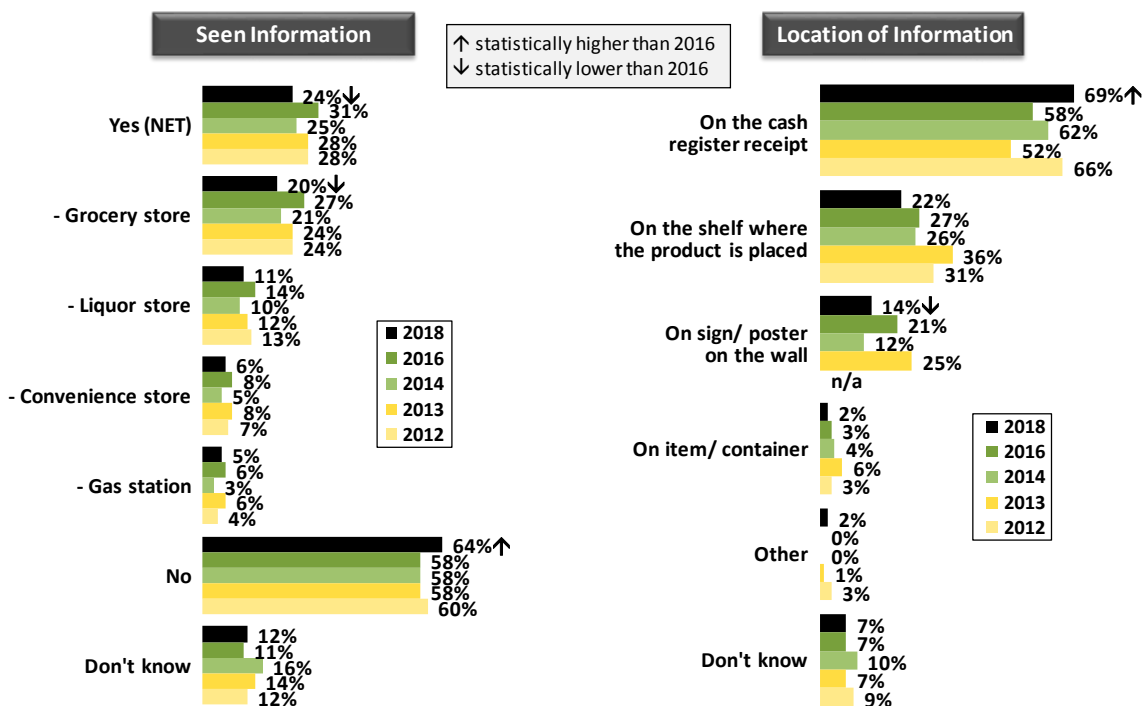
Recall of Information about Refundable Deposits

One-quarter of Albertans – down from 2016 – say they have seen information at retail stores that identifies the refundable deposit on beverage containers.

In 2018, 24% of Albertans say they have seen information about the refundable deposit – this is a significant 7 percentage point decrease from 31% in 2016. Two-in-ten (20%, down 7 points from 27% in 2016) recall seeing information at a grocery store, 11% at a liquor store, 6% at a convenience store, and 5% at a gas station.

Cash register receipts (69%) are the most common channel – up a significant 11 percentage points from 2016), followed by the shelf where the product is placed (22%), and on a sign or poster on the wall (14%, down 7 points from 21% in 2016).

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, 2018: n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007 / 2012 n=1,006)

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, 2018: n=235 / 2016 n=294 / 2014 n=236 / 2013 n=277 / 2012 n=272)

BOTTLE DEPOTS

Awareness and Importance of Regulation

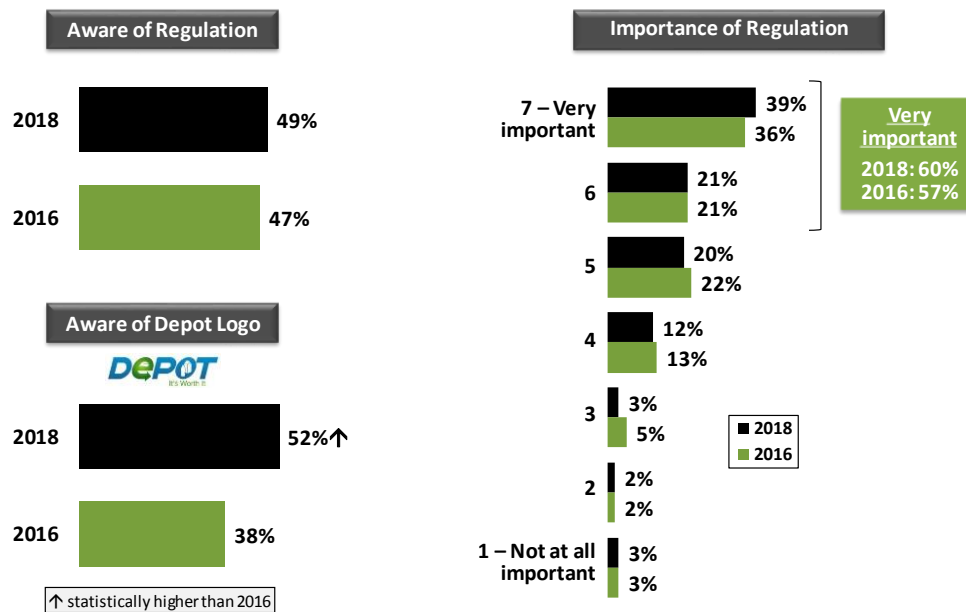
Roughly half of Albertans are aware of the regulation of bottle depots and the majority say it is important. Awareness of the Depot logo is up significantly from 2016.

Half (49%) of Albertans say they were aware that all bottle depots in Alberta are regulated by a central body.

When asked how important regulation is to them personally, eight-in-ten (80%) say it is 'important' (a rating of 5, 6 or 7 on a 7-point scale) – further, a majority (60%) say it is 'very important' (a rating of 6 or 7).

In 2018, more than half (52%) Albertans say they have seen the Depot logo – a significant 14 percentage point increase from 2016 (38%). It is notable that awareness is significantly *lower* among residents of Edmonton (41% vs. 53% to 57% in other regions).

Awareness and Importance of Regulation

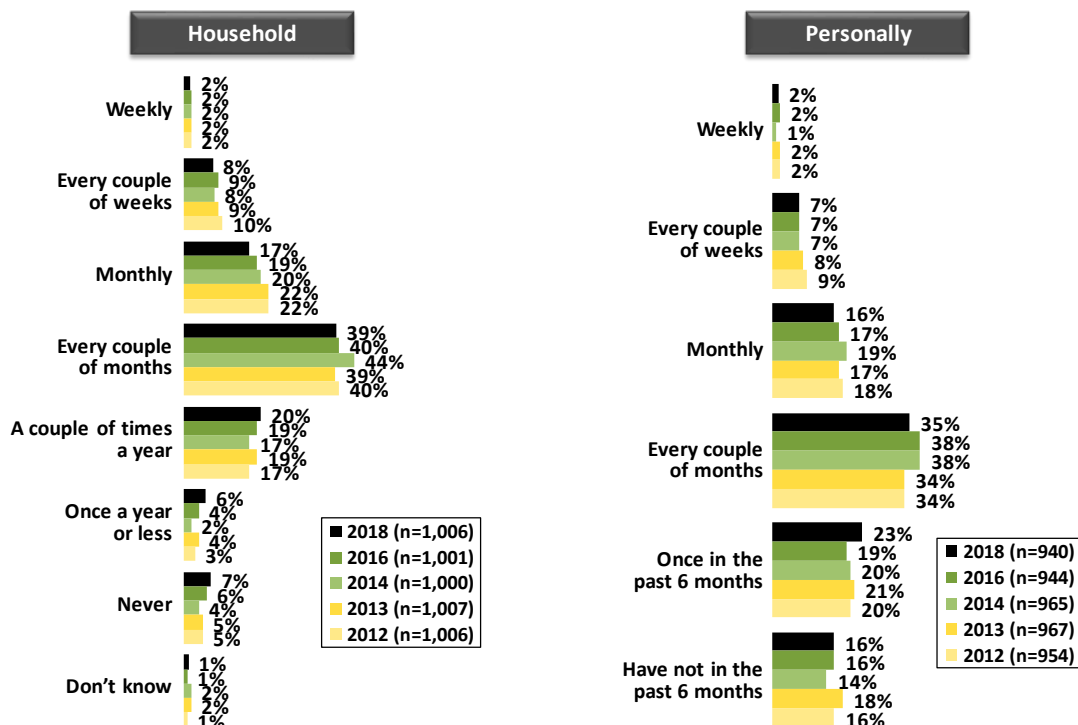


Q8a/Q13A. Prior to now, were you aware that all bottle depots in Alberta are regulated by a central body to ensure consistent standards across locations?
 Q13C. Prior to now, have you ever seen this logo? Q13B. As you may know, the Beverage Container Management Board, or BCMB, is responsible for regulating the recycling of empty beverage containers in Alberta. For you personally, how important is it that all bottle depots are regulated to ensure consistent standards?
 (Base: Household has returned to a depot, 2018 n=940 / 2016 n=944)

Frequency of Visitation

Roughly one-quarter (27%) of Albertans say their household returns containers to a bottle depot at least once a month, while 39% make a trip every couple of months, 20% a couple of times a year, 6% once a year or less, and just 7% say they never do so. Further, 84% 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 2016.

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: 2014, 2013, 2012: All respondents, 2010: Have returned for refund)

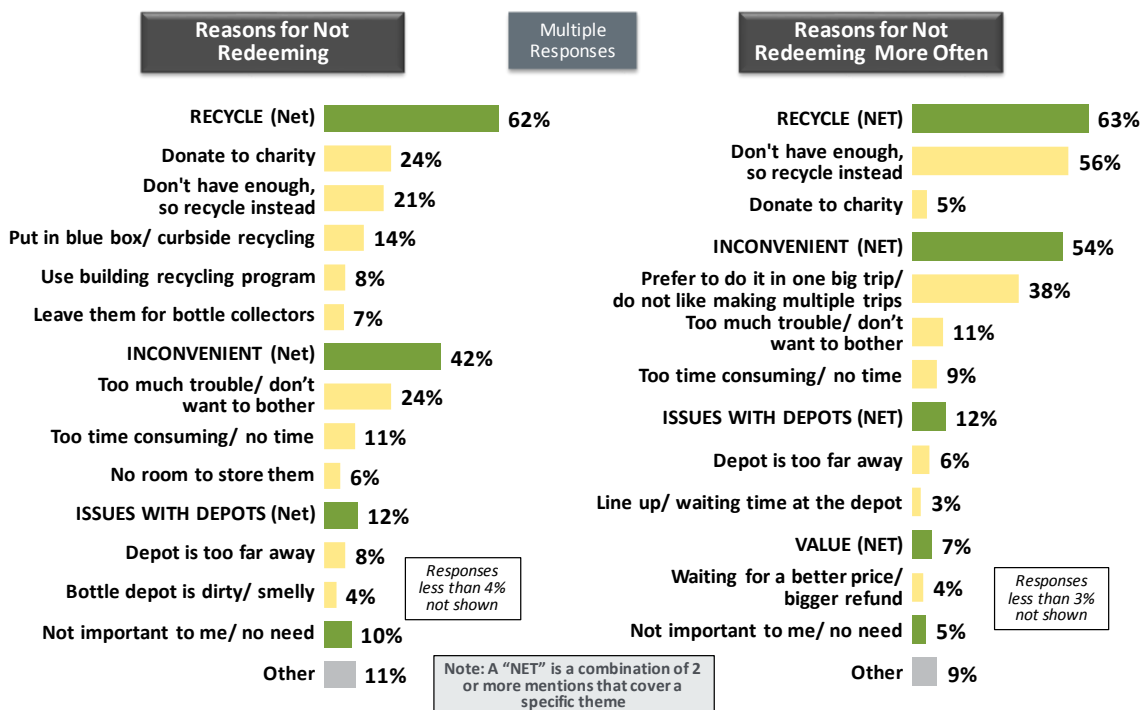
Q13. Thinking about the past 6 months, approximately how often have you personally returned empty beverage containers to a bottle depot? (Base: Household has returned for refund)

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

Among the small percentage (7%) of Albertans who say their household has *never* returned beverage containers to a depot, most (62%) indicate they **recycle the containers instead** – that is, by donating to a charity, recycling via an unspecified means, putting it in a blue box, using their building recycling program, or leaving items for bottle collectors. **Inconvenience** (42%) is also a key issue – 24% “*too much trouble*” (21%), 11% “*too time consuming*,” and 6% “*no room to store them*.” Just 12% cite issues with depots themselves, with 8% saying the “*depot is too far away*.”

The predominant reasons for visiting a bottle depot a couple of times a year or less are also recycling instead (63%) and inconvenience (54%) – with 38% specifically saying they “*prefer to do it in one big trip or do not like making multiple trips*.”

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: Household has never returned for refund, n=66)

Q12b. Why doesn't your household return empty beverage containers to a bottle depot for a refund more often? (Base: Household has returned for refund less than every couple of months, n=251)

Travel Time to Most Often Used Depot and Reason Location is Convenient

In 2018, fewer Albertans overall say the depot they use most often is the *only depot close to where they live*, though this continues to be an issue for residents of the Rural North.

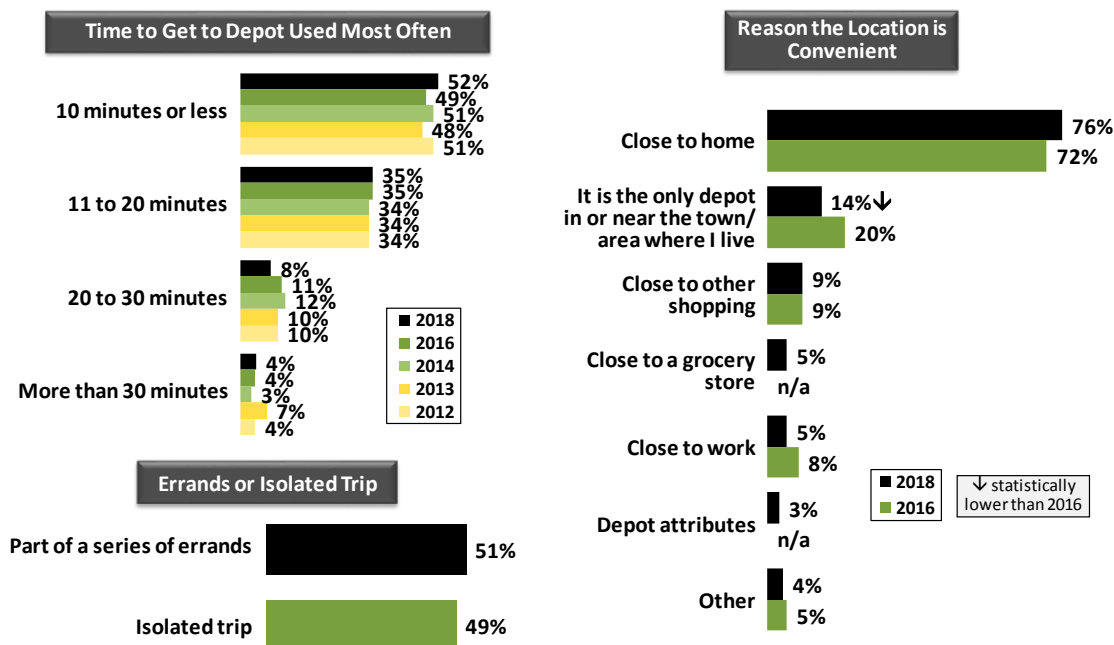
Half (52%) of past six months visitors say it takes 10 minutes or less to get to the bottle depot they use most often, while 35% say it takes 11 to 20 minutes, and just 12% say it takes more than 20 minutes. As might be expected, Rural Albertans report longer travel times.

Half (51%) say they usually visit a depot as part of a series of errands while half (49%) say it is an isolated trip.

Considering the bottle depot they use most often, 76% say the location is convenient because it is *close to home*, while 14% (down 6 percentage points from 20% in 2016) say it is the *only depot* close to where they live. Being close to *shopping* (9%), a *grocery store* (5%) or *work* (5%) are not key factors for most Albertans.

Fewer residents of the Rural North (56%) and South (53%) say the depot they use most often is *close to home*, while 48% of residents of the Rural North say it is the *only depot* close to where they live – higher than the Rural South (27%), Smaller cities North (27%) and Smaller Cities South (19%) [mentions are 1% in both Edmonton and Calgary].

How long does it take you to get to your bottle depot and what makes the location convenient?



Q16. On average, how long does it take you to get to the bottle depot you most often use? Q16.2NEW. When you visit a depot, is it usually part of a series of errands, or an isolated trip? Q16.1NEW. Thinking about the bottle depot you use most often, what makes the location convenient for you? (Base: Personally returned to depot in past 6 months, 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794 / 2012 n=772)

Importance of Bottle Depot Attributes

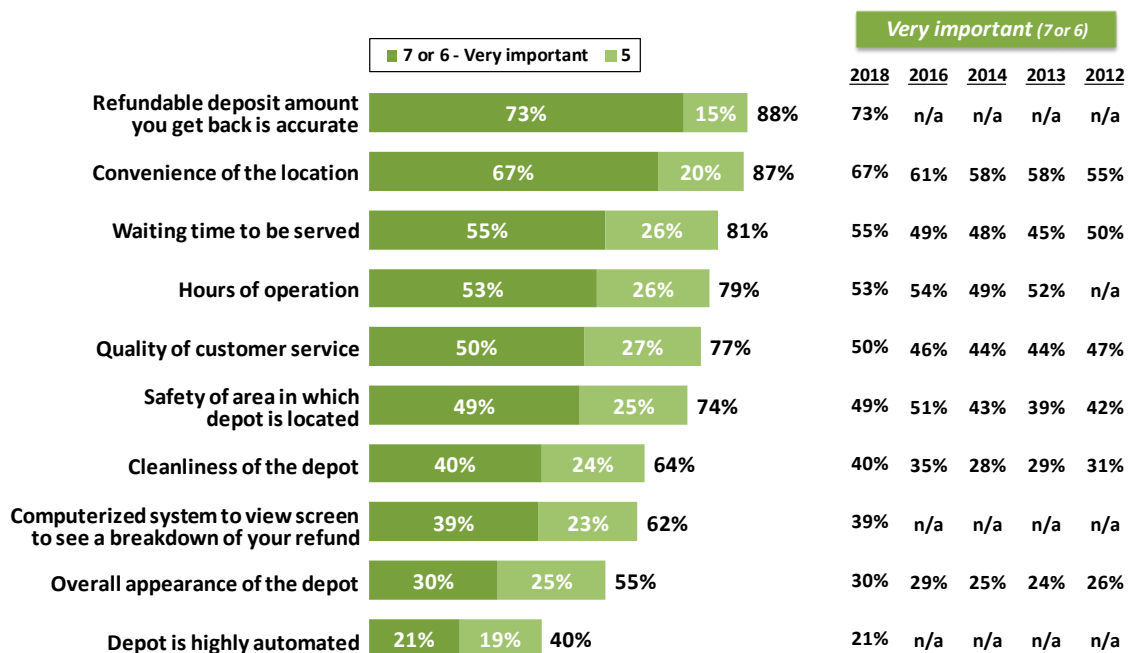
Accuracy of the refundable amount and convenience are the top two factors when selecting a depot to visit.

For Albertans who have visited a depot in the past six months, the most important factor when deciding **which bottle depot to go to** is that the *refundable deposit amount you get back is accurate* (73% very important – i.e. a rating of 7 or 6 on a 7-point scale), while the second most important factor is *convenience of the location* (67% very important).

In the next tier are *waiting time* (55% very important), *hours of operation* (53% very important), *customer service* (50% very important), and *safety of the depot location* (49% very important). Comparatively less important are *cleanliness* (40% very important), having a *computerized system* (39% very important), *overall appearance* (30% very important), and *automation* (21% very important).

It is important to note that the question wording was changed from *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* in 2016 to **when deciding which bottle depot to go to** in 2018. Therefore, direct comparisons to 2016 findings are not possible.

How important are these factors when deciding which depot to go to?



***Note: The question wording was revised in 2018, therefore, direct comparisons to previous years should be made with caution.**

Q14. Please indicate how important each of the following factors is to you **when deciding which bottle depot to go to** (prior to 2018: *whether or not to return empty beverage containers to a bottle depot*). (Base: Personally returned to depot in past 6 months, 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794 / 2012 n=772)

Satisfaction with Bottle Depot Attributes

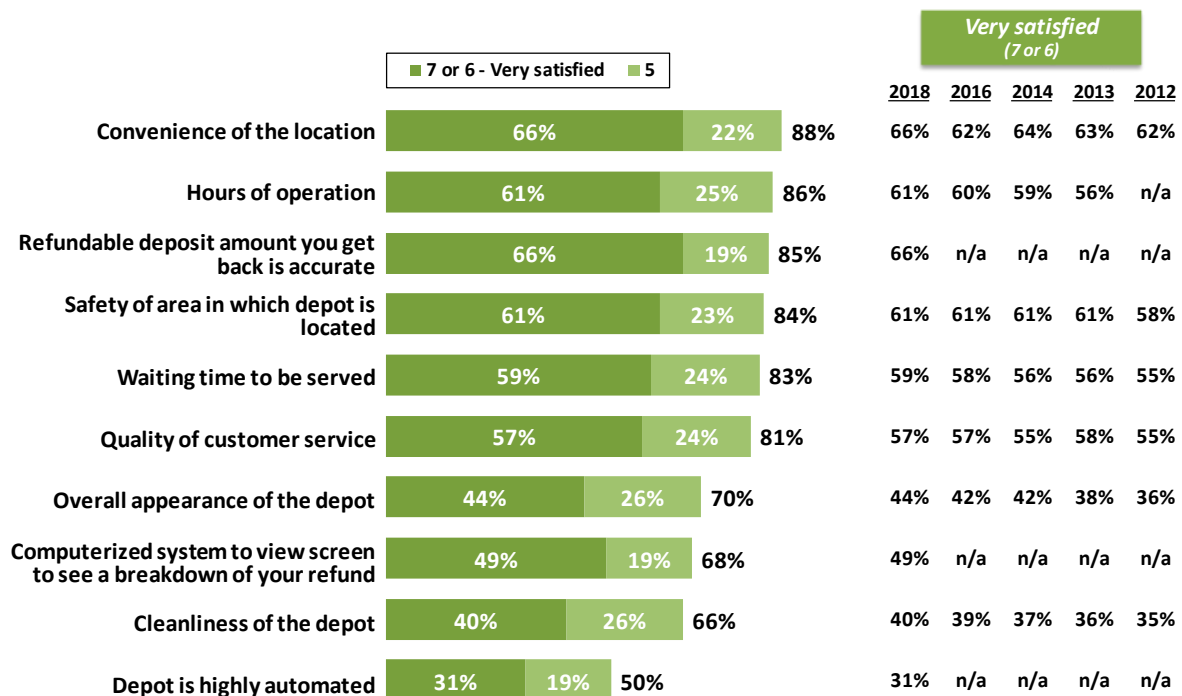
Satisfaction with most aspects of bottle depots is high. Overall satisfaction tops the eighty percent mark for six attributes, and roughly two-thirds are satisfied with another three attributes.

Looking at very satisfied ratings (i.e. a rating of 7 or 6 on a 7-point scale), the majority of Albertans are very satisfied with the *convenience of the location* (66%), *accuracy of the refund* (66%), *hours of operation* (61%), *safety of the area in which the depot is located* (61%), *waiting time* (59%) and *customer service* (57%).

Comparatively lower is satisfaction with having a *computerized system* (49%), the *overall appearance* (44%) and *cleanliness* (40%) of the depot, and the depot being *highly automated* (31%).

Findings are consistent with 2016.

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, 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794 / 2012 n=772)

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:

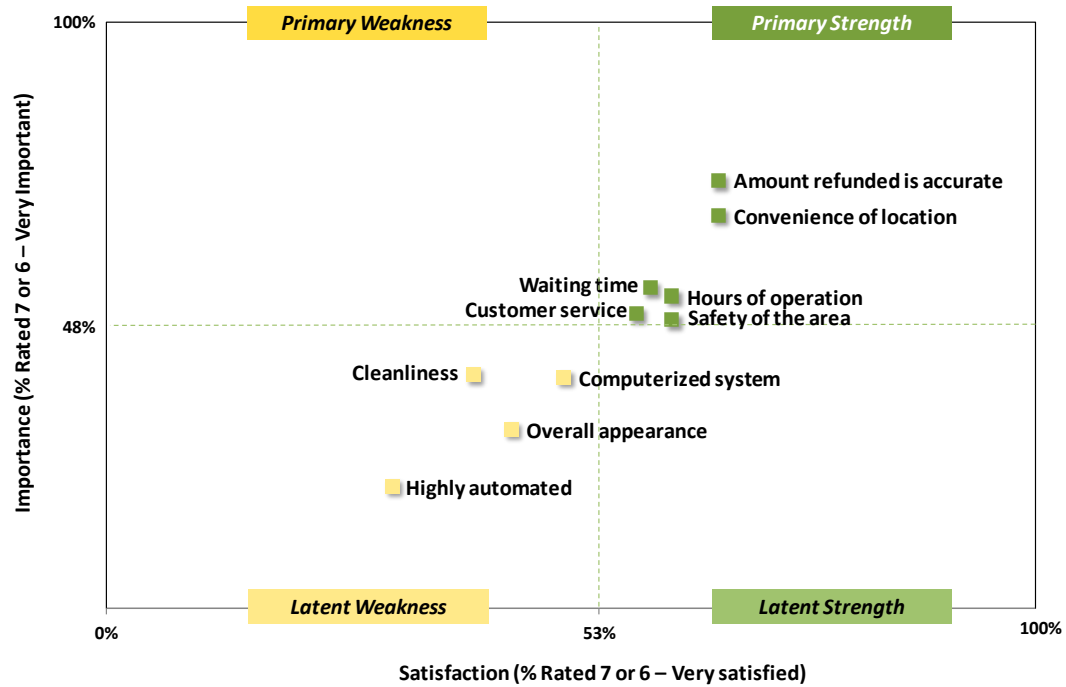
- Primary Strengths – Items in the top right quadrant are key strengths and performance should be maintained or improved.
- Primary Weaknesses – Items in the top left quadrant are ‘priority areas for improvement’ as they are considered important, however, satisfaction is relatively lower and there is 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: *amount refunded is accurate, convenience of location, waiting time, hours of operation, customer service and safety of the area*. Satisfaction with these attributes should be maintained.

At this time, there are *no primary weaknesses* that need to be addressed. *Cleanliness*, having a *computerized system*, the *overall appearance*, and being *highly automated* are *latent weaknesses* – while satisfaction is comparatively lower, so too is importance.

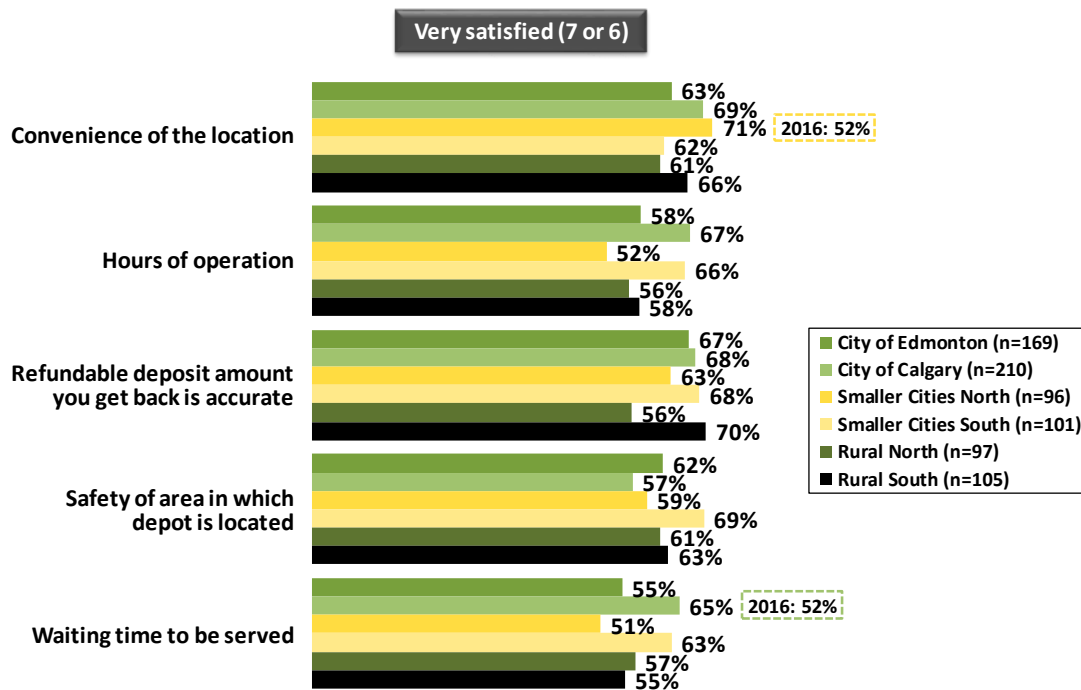
Importance versus Satisfaction



Due to small sample sizes within regions, there are relatively few statistically significant differences. In general, however, satisfaction tends to be *higher* in Calgary and Smaller Cities South and *lower* among residents of Smaller Cities North.

Satisfaction with both *hours of operation* and *waiting time* is higher among residents of Calgary compared to those living in Smaller Cities North.

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



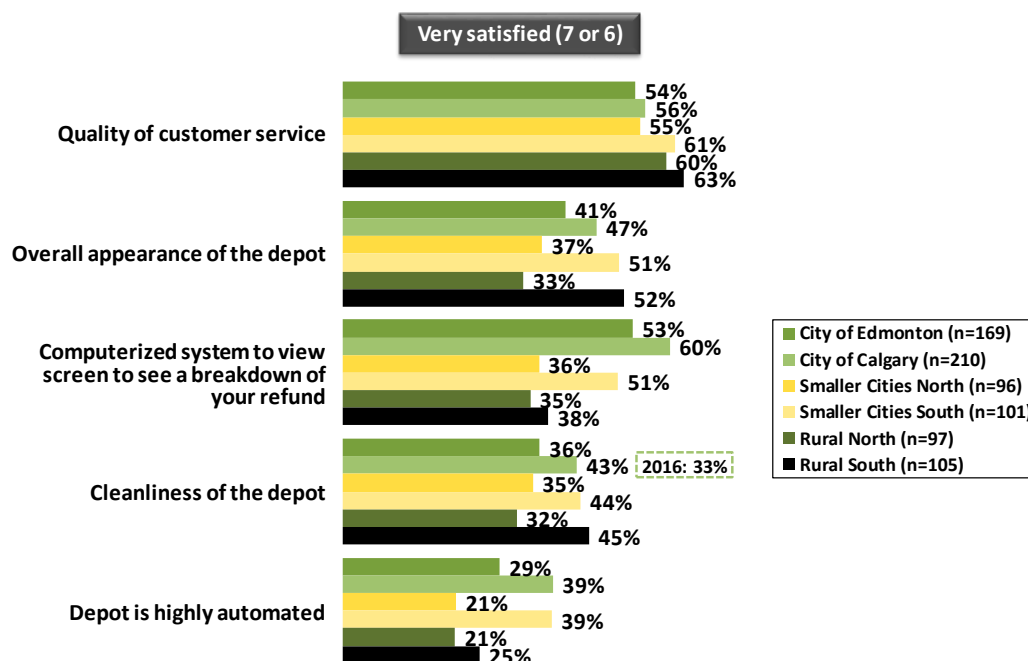
Q15. Thinking about your most recent experience returning empty beverage containers to a bottle depot, please indicate your satisfaction with each of the following. (Base: Personally returned to depot in past 6 months)

Compared to 2016, satisfaction has *increased* among residents of Smaller Cities North for *convenience of the location* – 71%, up from 52%, and among residents of Calgary for *waiting time to be served* – 65%, up from 52%.

A few statistically significant regional differences are observed:

- Satisfaction with the *overall appearance of the depot* is significantly *lower* among residents of the Rural North (33%) compared to residents the Rural South (52%), Smaller Cities South (51%) and Calgary (47%).
- Satisfaction with having a *computerized system* is significantly *lower* among residents of the Smaller Cities North (36%), the Rural North (35%) and the Rural South (38%).
- Satisfaction with the depot being *highly automated* is significantly *higher* among residents of Calgary and Smaller Cities South (both 39%).

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)

Satisfaction has *increased* among residents of Calgary for *cleanliness of the depot* – 43%, up from 33% in 2016.

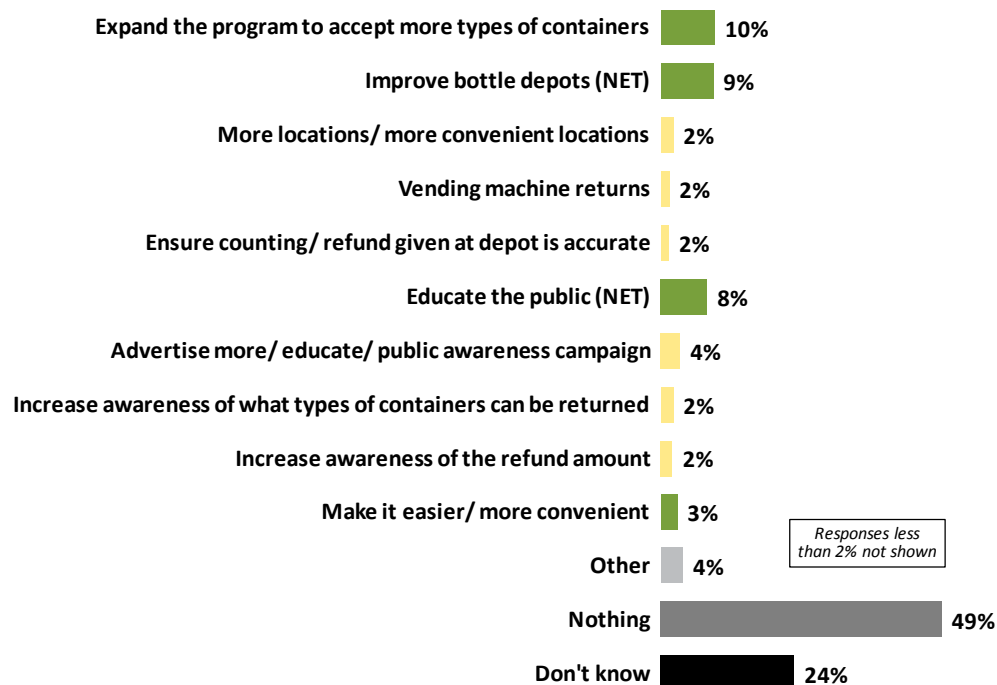
THE OVERALL RETURN RATE

Opportunities for Increasing the Return Rate for Beverage Containers

When asked *what could the BCMB do to increase the number of empty beverage containers that you return to bottle depots – other than increasing the refund or deposit* – the majority of Albertans say ‘nothing’ (49%) or ‘don’t know’ (24%).

The most frequent suggestions are expanding the program to accept more types of containers (10%), improving various aspects of bottle depots (9%), and educating the public (8%).

What could BCMB do to increase the number of beverage containers you return to bottle depots?



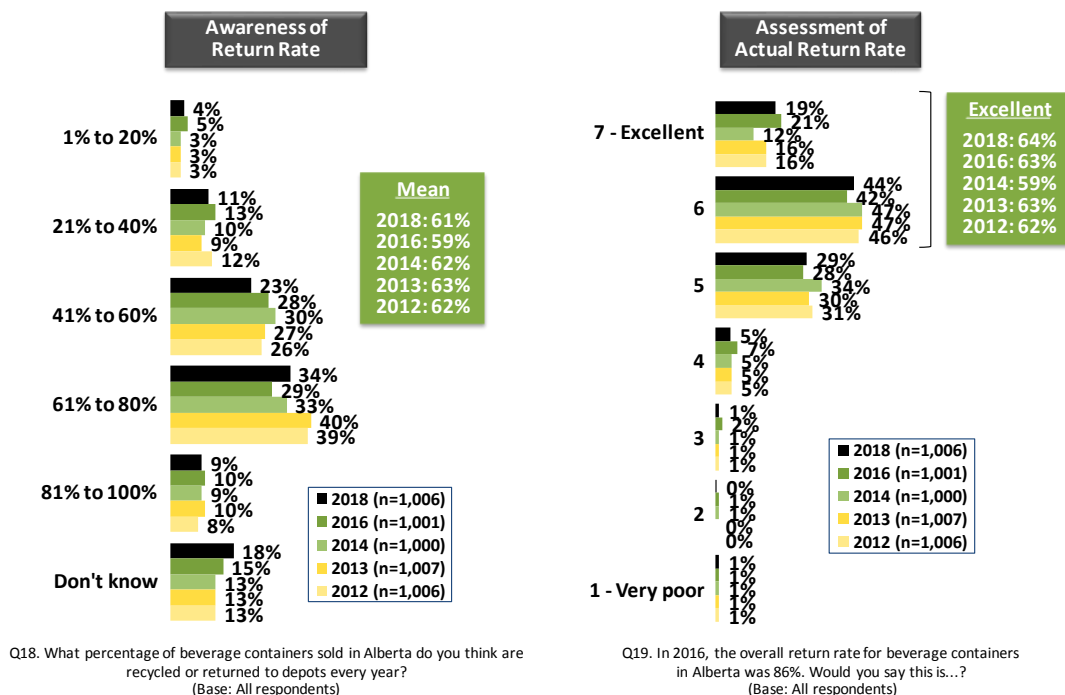
Q17. Other than increasing the refund or deposit, what could the Beverage Container Management Board do to increase the number of empty beverage containers that you return to bottle depots? (Base: All respondents, n=1,006)

Awareness of the Overall Return Rate for Beverage Containers

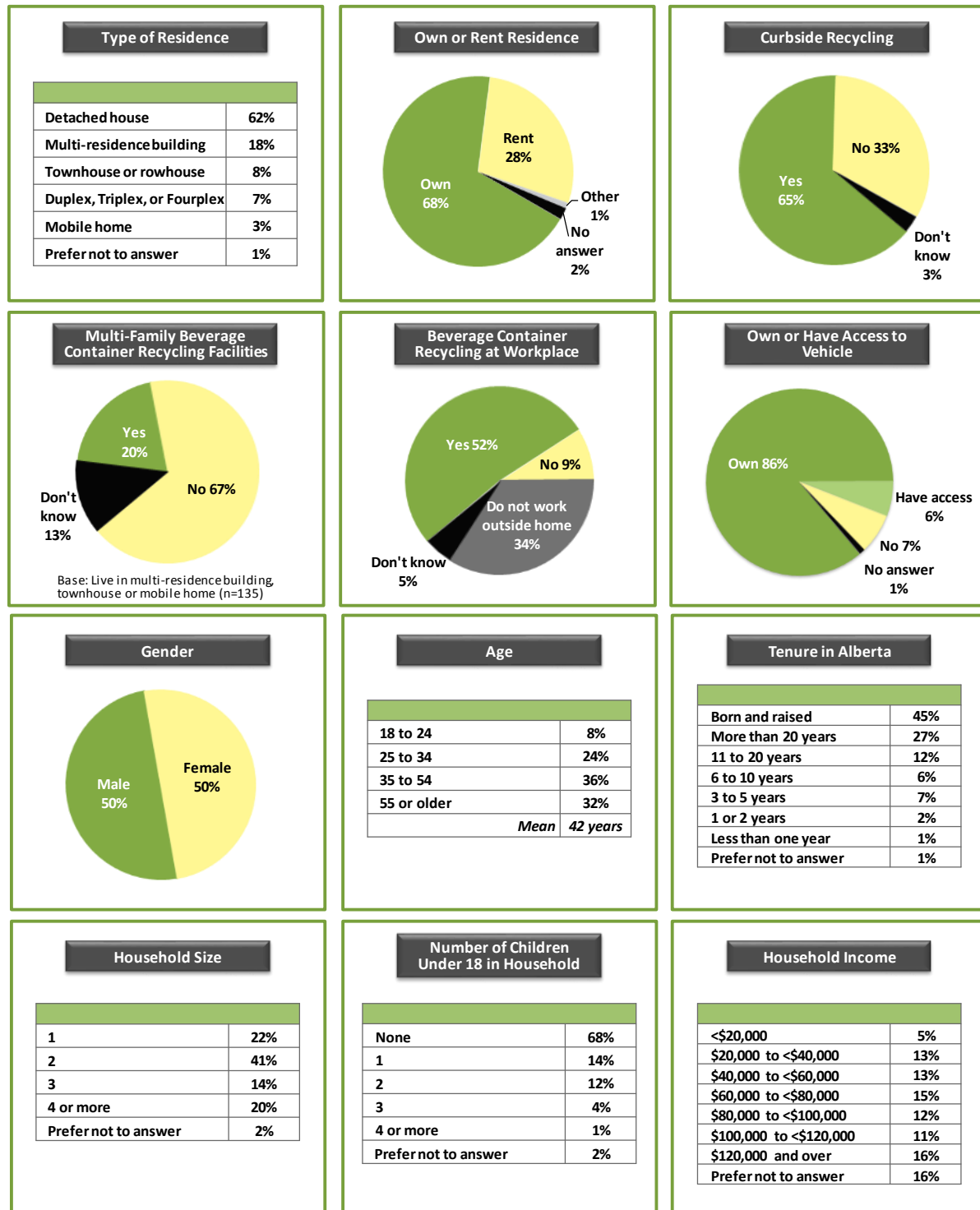
As might be expected, Albertans are not knowledgeable about the overall rate of return for beverage containers. When asked, the majority (57%) guess it is in the 41% to 80% range, while just 9% say 81% or higher. Findings are consistent with 2016.

When told the actual return rate in 2016 was 86%, 64% deem it as being excellent (rating of 6 or 7), while 93% offer a positive assessment.

What is the return rate for beverage containers?



RESPONDENT CHARACTERISTICS



(Base: All respondents, n=1,006)

APPENDIX A: SURVEY QUESTIONNAIRE

Beverage Container Management Board 2018 Survey of Albertans Final Questionnaire

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
Reducing electrical usage at home – for example, by turning off lights or unplugging electronics
Utilizing energy-efficient light bulbs
Utilizing solar power or other alternative means of producing energy

2A/2B. As you may know, recycling beverage containers can have a number of environmental benefits. For each benefit listed below, please indicate: 1) If you knew of this benefit prior to now, and, 2) For you personally, how important is this reason for recycling beverage containers.

[ACROSS TOP OF GRID – FIRST ROW]

A) Did you know of this benefit prior to now?

[DROP DOWN BOX]

Yes

No

[ACROSS TOP OF GRID – FIRST ROW]

B) For you personally, how important is this reason for recycling beverage containers?

[DROP DOWN BOX]

1 – Not at all important

2

3

4

5

6

7 – Very important

[DOWN SIDE OF GRID] [RANDOMIZE ORDER]

Reduces litter

Reduces the amount of waste going to landfills

Reduces greenhouse gas emissions from the manufacturing of beverage containers from raw materials

Reduces energy consumption from the manufacturing of beverage containers from raw materials

Reduces fresh water usage in the production of raw materials

Reduces wildlife habitat loss through landfill usage

Beverage Container Recycling Awareness and Behaviours

3. To the best of your knowledge, please indicate if each of the following types of empty 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

Plastic windshield wiper fluid containers

Soft drink cans

Juice cans

Glass soft drink bottles

Glass juice bottles

Glass water bottles

Olive oil 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)

Soup cartons

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

International Delight (non-dairy coffee creamer)

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

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 cans more than 1 litre in size

Juice cartons – refrigerated or tetra paks

Juice cartons more than 1 litre in size

Soup cartons

Foil juice pouches

Milk jugs

Milk cartons – refrigerated

Milk tetra paks

“Milk to go” containers

Liquid cream cartons

International Delight (non-dairy coffee creamer)

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

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**.

[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

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

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

Don't know

[DOWN SIDE OF GRID]

[INSERT ITEMS SELECTED 'YES' IN Q4]

[ASK Q6ANEW IF 'YES' TO ANY TYPE OF MILK OR CREAM CONTAINER OR JUICE CANS MORE THAN 1 LITRE IN SIZE OR JUICE CARTONS MORE THAN 1 LITRE IN SIZE OR BAG-IN-A-BOX WINE IN Q4, ELSE SKIP TO Q7]

6ANEW. How often does your household return each of the following to a bottle depot for a refund?

Please select one response for each item

[ACROSS TOP OF GRID]

Always
Most of the time
Once in a while
Never
Don't know

[DOWN SIDE OF GRID]

[INSERT IF SELECTED 'YES' IN Q4]

Milk and cream containers
International Delight (non-dairy coffee creamer)
Juice cans more than 1 litre in size
Juice cartons more than 1 litre in size
Bag-in-a-Box wine

[ASK 6BNEW IF ONCE IN A WHILE OR NEVER TO ANY ITEM IN 6ANEW, ELSE SKIP TO Q7]

6BNEW. Why doesn't your household return these items/return them more often to a bottle depot for a refund?

Please select all that apply for each item

[ACROSS TOP OF GRID]

[INSERT IF ONCE IN A WHILE OR NEVER AT 6ANEW]

Milk and cream containers
International Delight (non-dairy coffee creamer)
Juice cans more than 1 litre in size
Juice cartons more than 1 litre in size
Bag-in-a-Box wine

[DOWN SIDE OF GRID]

Didn't know you could return them to a bottle depot for a refund
Too much trouble/ don't want to bother
Depot is too far away
Too time consuming
Recycle them instead
Other (Please specify)
Don't know

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

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
Never
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 Q13A.]

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 Q13A]

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 Q13A]

13A. Prior to now, were you aware that all bottle depots in Alberta are regulated by a central body to ensure consistent standards across locations?

Please select one response only

Yes
No

13B. As you may know, the Beverage Container Management Board, or BCMB, is responsible for regulating the recycling of empty beverage containers in Alberta. For you personally, how important is it that all bottle depots are regulated to ensure consistent standards?

Please select one response only

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

13C. Prior to now, have you ever seen this logo?

Please select one response only



Yes
No

[IF NEVER SELECTED IN Q11, SKIP TO Q17]

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

Please select one response only

Weekly

Every couple of weeks

Monthly

Every couple of months

Once in the past 6 months

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

Don't know

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

14. Please indicate how important each of the following factors are to you when deciding which bottle depot to go to.

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

The refundable deposit amount you got back was accurate

There is a computerized system where you can view the screen to see a breakdown of your refund

The depot is highly automated

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

The refundable deposit amount you got back was accurate

There is a computerized system where you can view the screen to see a breakdown of your refund

The depot is highly automated

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 NEW. Thinking about the bottle depot you use most often, what makes the location convenient for you?

Please select all that apply

Close to home

Close to work

Close to a grocery store

Close to other shopping

Close to child's school

It is the only depot in or near the town/area where I live

Other (Please specify)

16.2 NEW

When you visit a depot, is it usually part of a series of errands, or an isolated trip?

Please select one response only

Isolated trip
Series of errands

Opportunities for Improvement

17. Other than increasing the refund or deposit, what could the Beverage Container Management Board do to increase the number of empty beverage containers that you return to bottle depots?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

Nothing
Don't know

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 2016, the overall return rate for beverage containers in Alberta was 86%. 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!