



Beverage Container Recycling – A Survey of Albertans 2020

Final Report

Submitted by:
IPSOS
700 6 Avenue SW, Suite 1950
Calgary, AB T2P 0T8

March 2020

TABLE OF CONTENTS

| | |
|-------------------------------------------------------------------------------------|-----------|
| SUMMARY OF KEY FINDINGS..... | 1 |
| BACKGROUND AND METHODOLOGY | 8 |
| BACKGROUND AND OBJECTIVES | 8 |
| METHODOLOGY | 8 |
| ENVIRONMENTAL BEHAVIOURS | 10 |
| PERSONAL PERFORMANCE | 10 |
| PERCEIVED IMPACT OF ENVIRONMENTAL BEHAVIOURS | 11 |
| AWARENESS AND IMPORTANCE OF ENVIRONMENTAL BENEFITS..... | 13 |
| BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS..... | 15 |
| PAST SIX MONTHS PURCHASE OF BEVERAGE CONTAINERS | 15 |
| AWARENESS OF REFUNDABLE BEVERAGE CONTAINERS | 17 |
| INCIDENCE OF BEVERAGE CONTAINER RECYCLING AND REDEMPTION BY TYPE OF CONTAINER | 22 |
| OVERALL INCIDENCE OF BEVERAGE CONTAINER RECYCLING AND REDEMPTION | 25 |
| TRACKING BEHAVIOURS WITH EMPTY BEVERAGE CONTAINERS..... | 26 |
| FREQUENCY OF RETURNING LOWER RETURN RATE CONTAINERS | 30 |
| COMMUNITY BOTTLE DEPOTS | 32 |
| AWARENESS OF REFUNDABLE DEPOSIT FOR BEVERAGE CONTAINERS..... | 33 |
| ANTICIPATED EFFECT OF KNOWING THE REFUNDABLE DEPOSIT FOR BEVERAGE CONTAINERS | 34 |
| RECALL OF INFORMATION ABOUT REFUNDABLE DEPOSITS | 35 |
| BOTTLE DEPOTS..... | 36 |
| AWARENESS AND IMPORTANCE OF REGULATION..... | 36 |
| FREQUENCY OF VISITATION | 37 |
| REASONS FOR NOT RETURNING BEVERAGE CONTAINERS OR NOT REDEEMING MORE OFTEN..... | 38 |
| TRAVELLING TO A BOTTLE DEPOT AND REASON LOCATION IS CONVENIENT..... | 40 |
| IMPORTANCE OF BOTTLE DEPOT ATTRIBUTES | 42 |
| SATISFACTION WITH BOTTLE DEPOT ATTRIBUTES | 43 |
| ACTION GRID ANALYSIS | 44 |
| SATISFACTION BY REGION | 46 |
| THE OVERALL RETURN RATE | 48 |
| OPPORTUNITIES FOR INCREASING THE RETURN RATE FOR BEVERAGE CONTAINERS | 48 |
| FEATURES TO INCREASE ALBERTANS' USE OF BOTTLE DEPOTS | 49 |
| AWARENESS OF THE OVERALL RETURN RATE FOR BEVERAGE CONTAINERS | 50 |
| RESPONDENT CHARACTERISTICS | 51 |
| APPENDIX A: SURVEY QUESTIONNAIRE | 52 |

SUMMARY OF KEY FINDINGS

Ipsos conducted a total of 1,001 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 Statistics Canada 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 what their opinion is 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 many beverage containers can be returned for a refund remains strong; however, awareness that juice cans and foil juice pouches are redeemable continues a downward trend.

- The percentage of Albertans who say that juice cans can be returned for a refund is on a continuous downward trend since a high of 69% in 2013 (currently at 53% in 2020).
- Similarly, the percentage of Albertans who think foil juice pouches can be redeemed has also been continuously decreasing from a high of 58% in 2013, to 46% in 2020.

Awareness is also very 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 31% (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 for a refund (35% vs. 29% in 2018).

Awareness that many dairy containers can be returned for a refund remains high and there have been no significant gains in the past five years. Fewer Albertans are aware that yogurt drinks in plastic bottles are redeemable and only one-third are aware that Albertans can recycle liquid meal replacements and International Delight containers for a refund.

- Notably, a sizable portion of the population (nearly one-quarter or more) are not sure if yogurt drinks, liquid meal replacements, and International Delight containers can be returned for a refund.

The majority of Albertans are correct in their assessment of three types of non-redeemable containers and are confident that they cannot be returned for a refund.

- The proportion of those who say that plastic windshield wiper fluid containers cannot be returned for a refund has significantly increased from 69% in 2018 to 74% in 2020.
- Still, one should note that between one-in-six and one-in-five say they are not sure whether these containers can be returned for a refund.

Recycling and Redemption of Beverage Containers

Reported recycling and/or redemption of beverage containers in the past six months remains near universal among Albertans, while those who said they have returned containers to a bottle depot has significantly increased since the dip seen in 2018.

Among Albertans who have purchased each type of redeemable beverage container, reported incidence of recycling and/or redemption exceeds the 80% mark for most categories.

- Reported incidence of redemption is somewhat lower for juice cans more than 1 litre, 'bag-in-a-box' wine and liquid meal replacements.
- Redemption is reportedly lowest for International Delight.
- More than one-in-five (22%) report returning soup cartons for a refund, identical to 22% in 2018.

Frequency of Returning Lower Return Rate Containers

Among five container types with lower return rates, the frequency of reported redemption is substantially lower for International Delight containers and 'bag-in-a-box' wine containers.

- Among Albertans who have purchased *juice cartons more than 1 litre* in size, 88% say they redeem them 'always' (79%) or 'most of the time' (9%).
- Redemption for *milk and cream* containers is solid at 84% 'always' (75%) or 'most of the time' (9%).
- Eight-in-ten (80%) Albertans who purchased *juice cans more than 1 litre* in size are redeeming them 'always' (69%) or 'most of the time' (11%).
- The frequency of redemption is notably lower for 'bag-in-a-box' wine (58%, including 48% 'always' and 10% 'most of the time')
- One-half are frequently redeeming *International Delight* (43% 'always' and 8% 'most of the time'), showing an upward trend from 44% in 2018.

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

Community Bottle Depots

The vast majority of Albertans have a bottle depot in their local community. Most of those who do not have a local bottle depot take their empty containers to a depot outside their local community.

- More than nine-in-ten (92%) Albertans have a bottle depot in their local community.
- Among the eight percent who do not have a local bottle depot, two-thirds (67%) take their empty beverage containers to a bottle depot outside of their local community, 16% recycle these containers foregoing collection of the deposit, 6% donate the containers, and 5% put them in the garbage among other alternatives.

Awareness of the Refundable Deposit for Beverage Containers

Roughly one-half of Albertans can cite the refundable deposit value for beverage containers while one-fifth say they ‘don’t know.’

- Just over one-half (54%) of Albertans know the refundable deposit value for beverage containers that are one litre or less, while 49% know the deposit value for beverage containers more than one litre in size.

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

- Among those unable to cite the refundable deposit value for containers one litre or less in size, 38% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 59% 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 effect. Just under one-half (47%) say knowing the correct deposit value would make them more likely to return larger beverage containers for a refund, while 49% say it would make no difference.

One-quarter of Albertans – consistent with 2018 – say they have seen information at retail stores that identifies the refundable deposit on beverage containers, most often on the cash register receipt or on the shelf where the product is placed.

- In 2020, 25% of Albertans say they have seen information about the refundable deposit. More than two-in-ten (23%) recall seeing information at a grocery store, 13% at a liquor store, 7% at a convenience store, and 5% at a gas station.
- Cash register receipts (63%) are the most common channel, followed by the shelf where the product is placed (30%), and on a sign or poster on the wall (16%).

Bottle Depots

Just over one-half (52%) of Albertans are aware of the regulation of bottle depots and the majority say it is important.

- More than one-half (52%) of Albertans say they were aware that all bottle depots in Alberta are regulated by a central body, consistent with results in 2018 (49%).

In 2020, nearly six-in-ten (58%) Albertans say they have seen the Depot logo – a significant 6 percentage point increase from 2018 (52%) and continuing an upward trend since 2016 (38%).

Frequency of Visitation

The frequency of returning empty beverage containers to a bottle depot has remained consistent over the past several years.

- Nearly three-in-ten (28%, similar to 27% in 2018) Albertans say their household returns containers to a bottle depot at least once a month, while the plurality (42%, on par with 39% in 2018) make a trip every couple of months, 19% a couple of times a year, 4% once a year or less, and just 5% say they never do so.

The inconvenience of having to bring beverage containers to a bottle depot and the ability to easily recycle them at home are the primary reasons for not redeeming and not redeeming more often.

- Among the small percentage (5%) of Albertans who say their household has *never* returned beverage containers to a depot, most (58%) indicate they **recycle the containers instead** – that is, by donating to a charity, recycling via an unspecified means, putting it in a blue box, leaving items for bottle collectors, or using their building's recycling program.
- **Inconvenience** (34%) is also a key issue – 17% “too much trouble,” 9% “too time consuming,” 4% “prefer to do it in one big trip,” and 4% mobility issues such as “disabled/handicapped.”

Bottle Depots: not Accepting Certain Items and Barriers to Using Bottle Depots

New questions asked in 2020 show that 39% of Albertans have brought a container to a bottle depot that was not accepted. In almost one-half of those instances, respondents said the bottle depot employee explained why the container was not accepted, whereas 53% said the employee did not provide an explanation.

The leading barriers keeping people from using bottle depots are lack of transportation, too few depots, too time consuming, and that some people describe themselves as ‘lazy’ or not care enough to do it.

Bottle Depots: Travelling and Location Convenience

In 2020, Albertans are split on whether they visit the bottle depot when doing a series of other errands, or whether they make a special trip when going to the depot. The majority use the depot that is close to their home rather than those that are close to shopping or work.

- Considering the bottle depot they use most often, 71% say the location is convenient because it is *close to home*, while 18% say it is the *only depot* close to where they live.

One-half of Albertans travel 10 minutes or less to their bottle depot which roughly aligns with what they say a reasonable amount of time is. The majority (79%) think that it is reasonable to wait up to 10 minutes to be served at a bottle depot.

- One-half (51%) 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 13% say it takes more than 20 minutes. As might be expected, Rural Albertans report longer travel times.
- For the most part, the actual travel time corresponds with what Albertans think a reasonable travel time is.

Bottle Depots: Importance vs. Satisfaction

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

- In the next tier are *quality of customer service* (54% very important), *hours of operation* (54% very important), *waiting time* (50% very important), and *safety* of the depot location (49% very important), also on par with results in 2018.
- Comparatively less important are *cleanliness* (37% very important), having a *computerized system* (44% very important), *overall appearance* (29% very important), and *automation* (19% very important), showing stable patterns over the past two years.

Satisfaction with most aspects of bottle depots is highest for the depot features which are most important.

- 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 *accuracy of the refund* (71%), *convenience of the location* (65%), *safety* of the area in which the depot is located (64%), *waiting time* (62%), *customer service* (58%) and *hours of operation* (60%).
- Comparatively lower is satisfaction with having a *computerized system* (53%), the *overall appearance* (46%) and *cleanliness* (44%) of the depot, and the depot being *highly automated* (31%).

When examining the satisfaction results by region, we can see some variation across the province. In general, satisfaction tends to be *higher* in Smaller Cities South and *lower* among residents of Edmonton.

Opportunities for Increasing the Overall Return Rate

Potential strategies to increase the number of beverage containers returned to bottle depots include allowing for more types of containers to be returned, improving bottle depots and their locations, educating the public more, and making it more convenient.

- Notably, 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’ (43%) or ‘don’t know’ (28%).

Features to Increase Albertans’ Use of Bottle Depots

Of the three features asked about in the 2020 survey, the feature that received the most support was for depots to accept a wider range of items. In second place, Albertans are interested in a pick-up service. Finally, a minority are interested in having their refund deposited in an online account to save them from waiting in line.

- The feature that received the most support was to expand the service and have bottle depots **accept more recyclable items** besides beverage containers. More than seven-in-ten (72%) Albertans thought this service would increase their likelihood of bringing these items to the bottle depot.
- Just under four-in-ten (38%) Albertans said they would be more likely to recycle their beverage containers with a depot that offered a **pick-up service** that would pay users a percentage of their total refund at a later time.
- About one-quarter (24%) of Albertans said they would be interested (a 6 or 7 on a 7-point scale) in a service where they could drop off their beverage containers at the bottle depot and have the **refund deposited in an online account** rather than waiting in line. The proportion of Albertans who said they would not be interested (a 1 or 2 on a 7-point scale) in this service is about four-in-ten (39%).

KEY OBSERVATIONS:

Continue to combat complacency with key messaging.

Albertans in 2020 express lower attitudinal scores regarding personal actions that can be taken to protect the environment, thus showing complacency in their views. At the same time, 88% feel they are doing a 'good' job protecting the environment, but this includes 72% who state that they are only doing 'somewhat' of a good job, denoting that they could be doing more and they admit it. Key messaging related to the importance of their personal actions on Alberta's footprint while earning money at the same time could encourage higher redemption rates.

Continue and expand upon educational strategies about the types of beverage containers that can be redeemed and the value associated with redemption, with an increased focus on the younger generation.

A lack of awareness of the types of beverage containers which can be redeemed is a key reason why Albertans do not return items to bottle depots more often. Further, there is a considerable proportion of Albertans who are unsure if certain beverage containers can be redeemed (namely 'bag-in-a-box' wine, liquid meal replacements, yogurt drinks in plastic boxes, International Delight, and foil juice pouches). Consideration can also be given to expanding the types of items that can be returned to a bottle depot – the number one suggestion from Albertans.

Awareness of the actual refundable deposit for beverage containers is also not widespread and is generally lower among those aged 18-34 (as are redemption rates). Knowing the actual redemption amount increases the likelihood of returning empty beverage containers to bottle depots, especially among those 18-34 years. Further, just one-quarter of Albertans have seen information at retail stores that identifies the deposit amount, which offers an opportunity for improvement moving forward.

Underscore how easy it is to use bottle depots and continue to improve the convenience of locations, particularly in larger urban centres.

Residents of Calgary and Edmonton are notably less likely to report that they have a bottle depot in their local community. Results show that the convenience of bottle depot locations is the second most important feature of bottle depots, only after the accuracy of the refund. On average, Albertans feel that travelling 10 minutes or less to a bottle depot is reasonable, so the apportionment of locations could be reviewed. Of note, Edmontonians show both lower redemption rates and lower satisfaction measures with bottle depots which could be a regional area of focus in future.

Actively compete against curbside recycling.

Albertans who have curbside recycling exhibit lower redemption rates for certain beverage containers. For them, it is more convenient to use curbside recycling than to go to a bottle depot. However, once aware of the value of the redeemed items, those with curbside recycling would be more likely to return items to bottle depots for a refund.

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 86% in 2019, 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, 2018 and again in 2020. Key research objectives of the 2020 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;
- Potential changes in usage of bottle depots should features of the bottle depot expand and/or change; and,
- Changes in knowledge, attitudes and behaviours from 2016.

Methodology

Between February 5th and 19th, 2020, Ipsos conducted a total of 1,001 online interviews with a representative sample of Albertans aged 18 years and older. The median interview length was 16 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 Statistics Canada Census data. The precision of online surveys is measured using a credibility interval. With a sample of 1,001, 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 | 235 | $\pm 6.4\%$ |
| City of Calgary | 320 | $\pm 5.5\%$ |
| Smaller Cities North ¹ | 125 | $\pm 8.8\%$ |
| Smaller Cities South ² | 121 | $\pm 8.9\%$ |
| Rural North | 109 | $\pm 9.4\%$ |
| Rural South | 91 | $\pm 10.3\%$ |
| TOTAL | 1,001 | $\pm 3.5\%$ |
| 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.

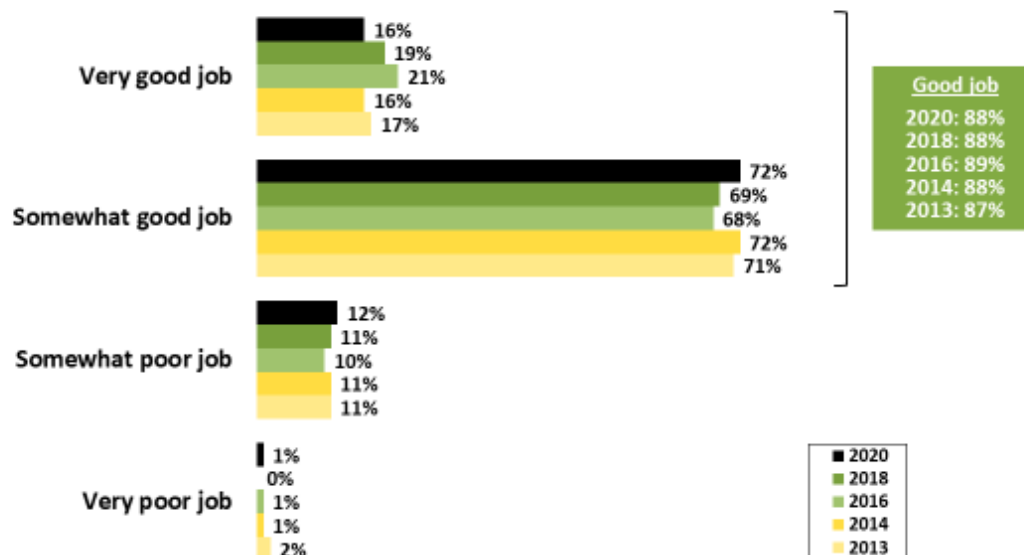
ENVIRONMENTAL BEHAVIOURS

Personal Performance

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

Overall, 88% of Albertans rate their own personal performance when it comes to protecting the environment as 'very good' or 'somewhat good'. Although they feel they are doing a good job, most (72% 'somewhat good') recognize that they could be doing more. That said, one-in-six (16%) say they do a 'very good' job, consistent with 2018 (19%).

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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007)

Those who are more likely to rate their personal environmental performance as 'good' tend to be:

- Albertans aged 55+ (91% vs. 85% among 35-54 year-olds);
- Those living in a detached house (89% vs. 79% living in a townhouse/rowhouse); and,
- Those who have personally returned empty beverage containers to a bottle depot (89% vs. 82% who have not).

Perceived Impact of Environmental Behaviours

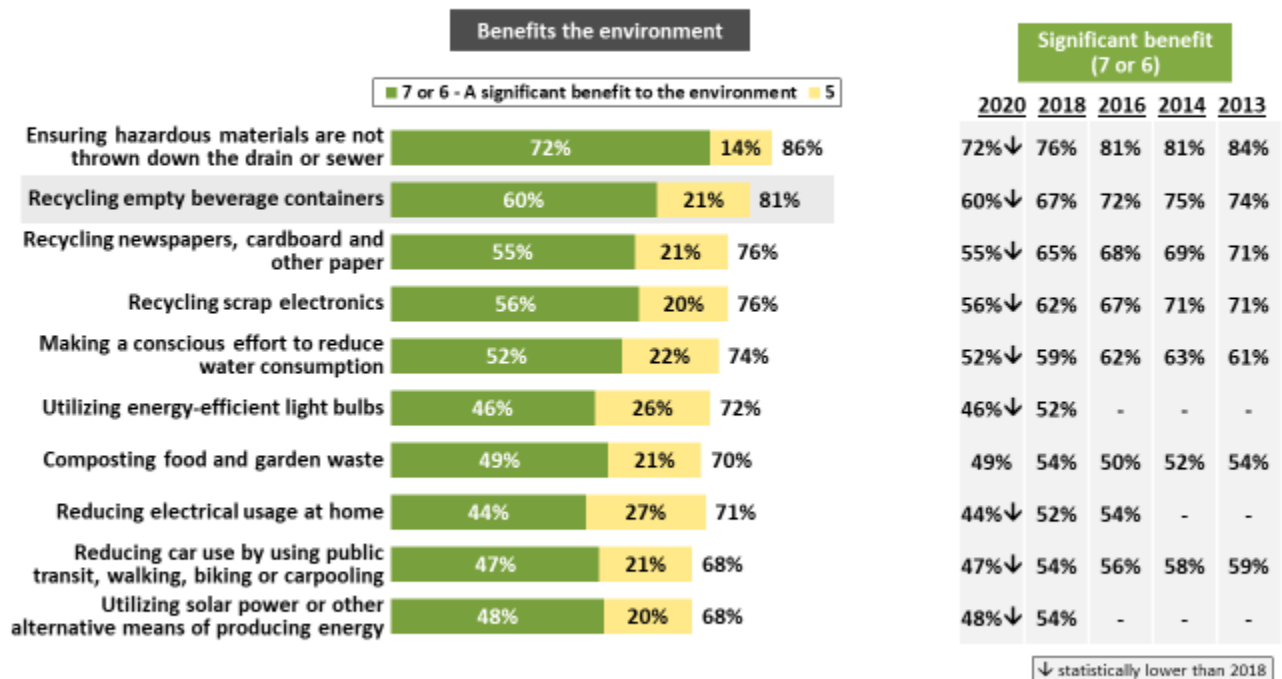
While Albertans recognize the importance of recycling empty beverage containers, nearly all measures are down from 2018.

Just over eight-in-ten (81%) Albertans say *recycling empty beverage containers* benefits the environment, including six-in-ten (60%) who say it has a significant benefit to the environment (a rating of 7 or 6 on a 7-point scale), decreased from 67% in 2018.

The largest proportion of Albertans feels that *ensuring hazardous materials are not thrown down the drain or sewer* (72%) has a significant impact on the environment, down from 76% in 2018, and 55% of respondents feel that *recycling newspapers, cardboard and other paper* has a notable impact on the environment, also decreased in 2020 from 65% in 2018.

More than one-half (56%) of respondents also believe that *recycling scrap electronics* has a significant impact on the environment, down from 62% in 2018, and 52% feel this way about *making a conscious effort to reduce water consumption*, also decreased since 2018 (59%).

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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007)

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* (48%, decreased from 54% in 2018), *using energy-efficient lightbulbs* (46%, down from 52% two years ago), and *reducing electrical usage at home* (44%, seeing a decline from 52% in 2018).

Slightly less than one-half (47%) perceives *reducing car use by using public transit, walking, biking, or carpooling* has a significant impact to benefit the environment, although this view has experienced a decline since 2018 (54%).

The only activity that has remained statistically stable involves *composting food and garden waste* (49% see it as an activity that has a significant benefit to the environment vs. 54% two years ago).

Awareness and Importance of Environmental Benefits

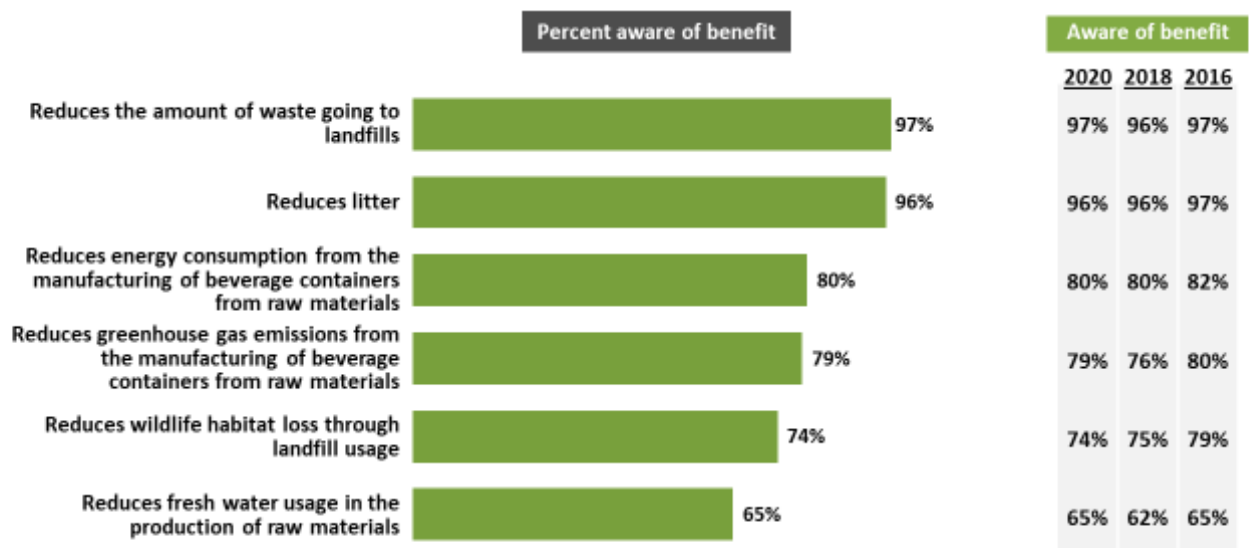
Reducing litter and reducing the amount of waste going to landfills continue to be the key motivators for recycling empty beverage containers.

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 the amount of waste going to landfills* (97%, consistent with 96% in 2018) and *reduces litter* (96%, identical to results in 2018).

Eight-in-ten (80%) Albertans are aware of the benefit of reducing energy consumption, exactly on par with results two years ago, and 79% are aware of the benefit of reducing greenhouse gas emissions, consistent with 76% in 2018. As well, 74% of Albertans are aware of the benefit of reducing wildlife habitat loss through landfill usage, consistent with 75% in 2018.

Lower levels of awareness are seen for *reducing fresh-water usage in the production of raw materials* (65%, also on par with 62% two years ago).

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



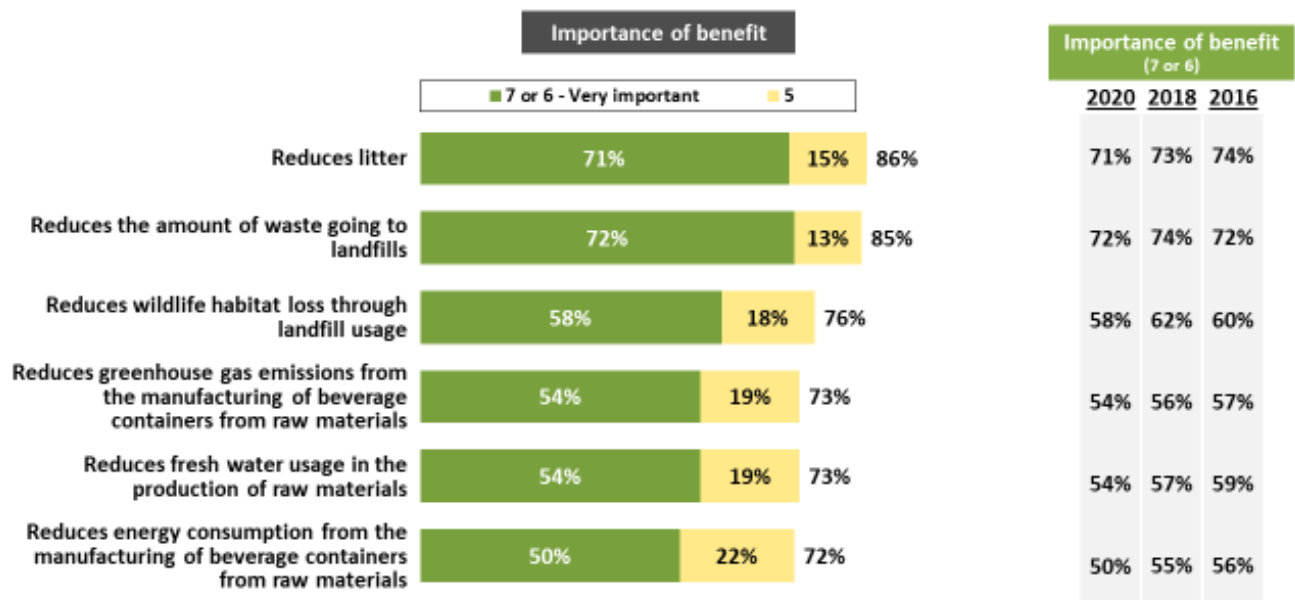
Q2A/B. As you may know, recycling beverage containers can have a number of environmental benefits. For each benefit listed below, please indicate: 1) If you knew of this benefit prior to now, and, 2) For you personally, how important is this reason for recycling beverage containers.
 (Base: All respondents, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001)

As far as **personal motivators** for recycling beverage containers, *reducing litter* (71% 'very important', on par with 73% in 2018) and *reducing waste going to landfills* (72% 'very important', consistent with 74% in 2018) continue to be the most influential motivators.

In comparison, fewer Albertans feel that it is 'very important' to recycle beverage containers because it *reduces wildlife habitat loss through landfill usage* (58%, similar to 62% in 2018), it *reduces greenhouse gas emissions* (54%, on par with 56% in 2018), and it *reduces fresh water usage* (54%, consistent with 57% two years ago).

Lastly, just one-half (50%) of Albertans think it is important to recycle beverage containers to *reduce energy consumption*, slightly down from 55% in 2018.

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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001)

BEVERAGE CONTAINER RECYCLING AWARENESS AND BEHAVIOURS

Past Six Months Purchase of Beverage Containers

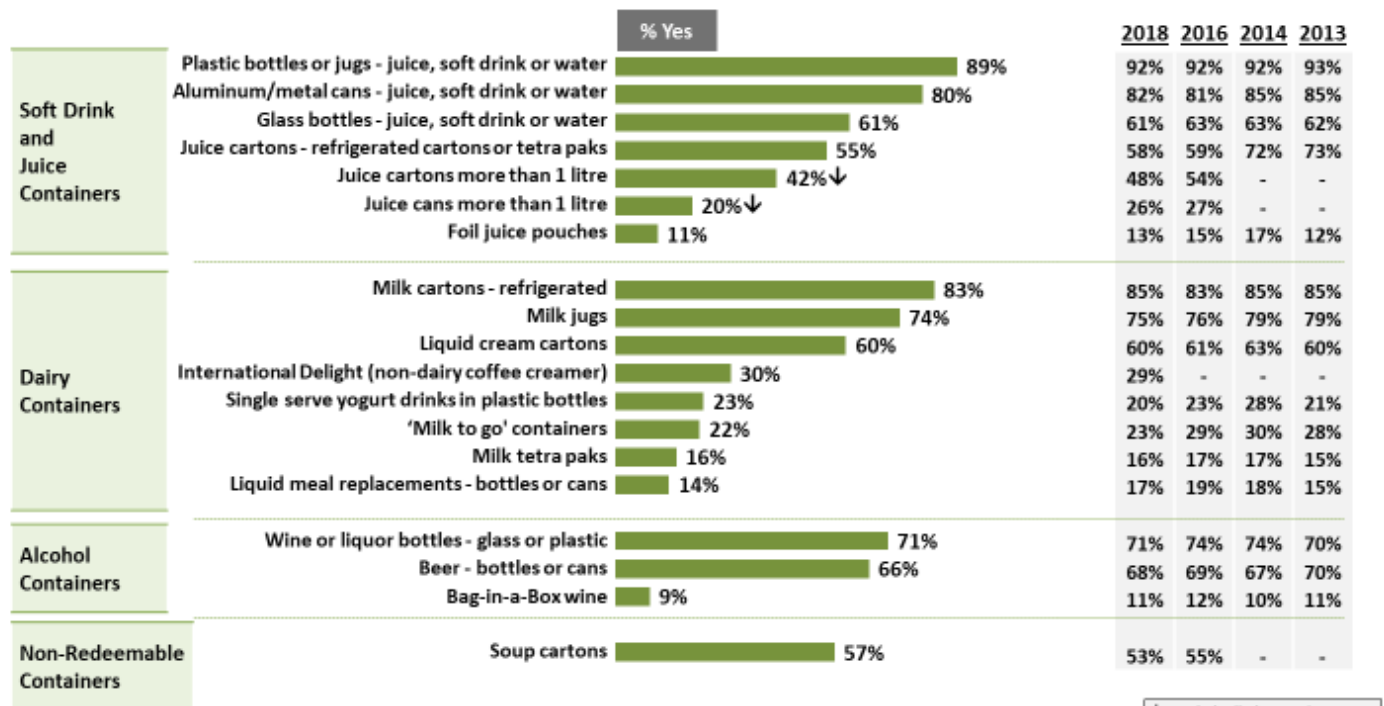
In order to better understand awareness of refundable containers and beverage container recycling behaviours, respondents were first asked what types of containers their household purchases.

The highest incidence of beverage container purchases are for plastic bottles or jugs, followed by milk cartons, aluminum or metal cans, milk jugs, wine or liquor bottles, and beer bottles or cans, showing the same pattern as in 2018.

With respect to soft drink and juice containers, 89% of Albertans have purchased plastic bottles or jugs within the past six months (similar to 92% in 2018), and 80% have purchased aluminum or metal cans (consistent with 82% in 2018).

Further, 61% of Albertans have purchased glass bottles within the past six months (identical to 61% in 2018), 55% have purchased juice cartons (statistically unchanged from 58% in 2018), and 42% have purchased juice cartons of more than one litre (down from 48% in 2018).

Household purchases of 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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007)

↓ statistically lower than 2018

Purchases are less prominent for juice cans more than one litre (20%, decreased from 26% two years ago), and for foil juice pouches (11%, similar to 13% in 2018).

When assessing purchases of **dairy containers** in the past six months, milk cartons are purchased most often (83%, consistent with 85% in 2018), followed by milk jugs (74%, on par with 75% in 2018), and liquid cream cartons (60%, identical to 60% two years ago).

In addition, 30% have purchased International Delight, 23% have purchased single serve yogurt drinks in plastic bottles and 22% have purchased 'milk to go' containers within the past six months, showing steady patterns as seen in 2018. Fewer Albertans have purchased milk tetra paks (16%, identical to 16% in 2018) or liquid meal replacements (14%, similar to 17% two years ago).

When looking at **alcohol containers**, 71% of Albertans have purchased wine or liquor bottles within the past six months (identical to results in 2018) and 66% have purchased beer bottles or cans (consistent with 68% in 2018). Just 9% have purchased 'bag-in-a-box' wine, statistically unchanged from 11% two years ago.

Finally, 57% of Albertans have purchased **soup cartons** within the past six months, similar to 53% in 2018.

Awareness of Refundable Beverage Containers

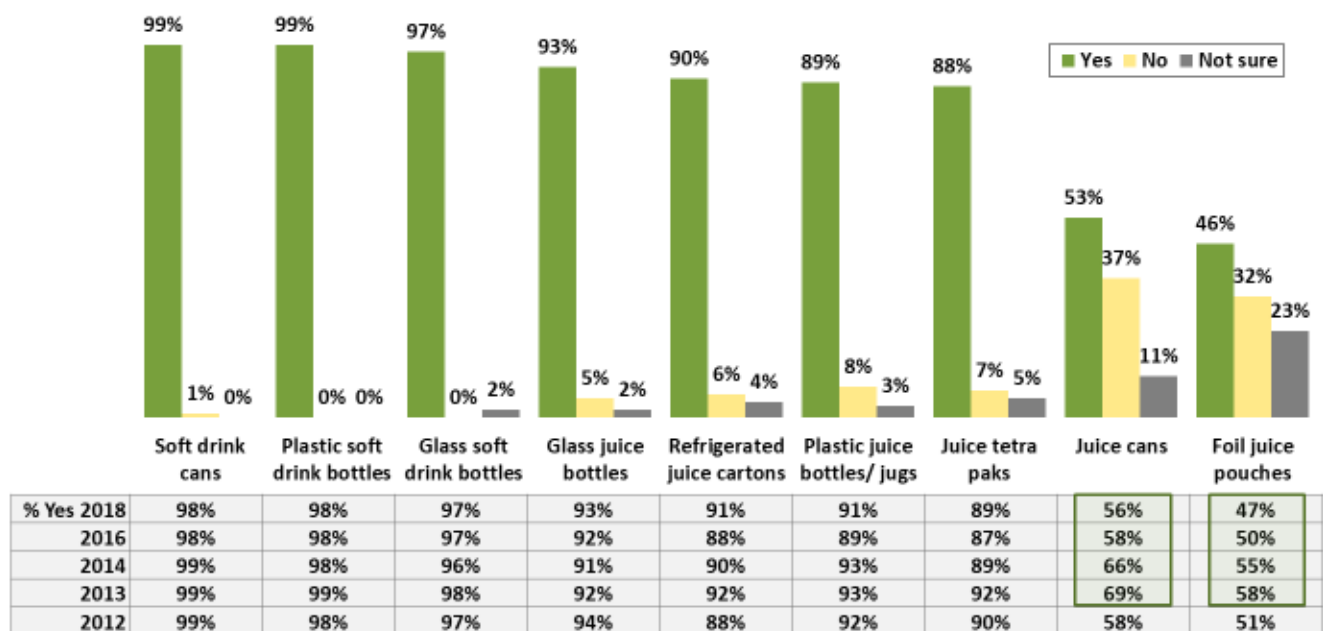
Awareness that many beverage containers can be returned for a refund remains strong; however, awareness that juice cans and foil juice pouches are redeemable continues a downward trend.

Awareness that most types of **soft drink and juice containers** can be returned for a refund is extremely high (close to 90% or more), including soft drink cans (99%), plastic soft drink bottles (99%), glass soft drink bottles (97%), glass juice bottles (93%), refrigerated juice cartons (90%), plastic juice bottles/jugs (89%), and juice tetra paks (88%). Awareness of the ability to redeem these items has remained consistently high since 2018.

In this beverage container category, awareness of the ability to return items for a refund is lowest and continues to decline for juice cans (53%, consistently down from 69% in 2013) and foil juice pouches (46%, also consistently down from 58% in 2018). Further, more than one-third (37%) of Albertans say that juice cans cannot be returned for a refund and one-third (32%) of Albertans say foil juice pouches cannot be redeemed.

What can be returned for a refund? (1/4)

Soft drink and juice containers



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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007)

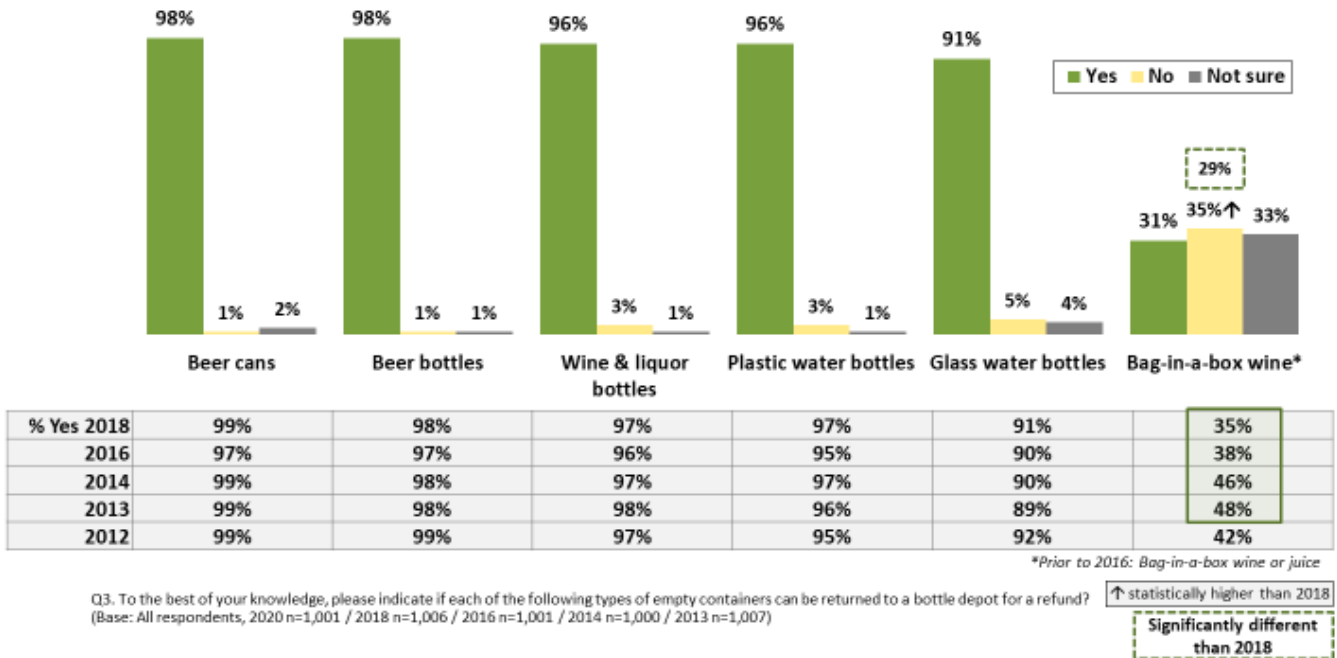
Awareness that most types of soft drink and juice containers can be returned for a refund is significantly *lower* among those who are newcomers to the province within the past 5 years compared with residents who have lived in Alberta for more than ten years, and also tends to be lower among younger Albertans aged 18 to 34 years, particularly for juice cans (39% of those aged 18 to 34).

Awareness is also extremely high that most types of **water and alcoholic beverage containers** can be returned for a refund: 98% for beer cans; 98% for beer bottles; 96% for wine and liquor bottles; 96% for plastic water bottles; and, 91% for glass water bottles. Awareness of the ability to recycle these items has remained solid over the past several years.

However, 'bag-in-a-box' wine sees a 31% awareness level for the ability to return the item for a refund (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 2018, more Albertans now say bag-in-a-box wine cannot be returned for a refund (35% in 2020 up from 29% in 2018).

What can be returned for a refund? (2/4)

Water and alcohol containers



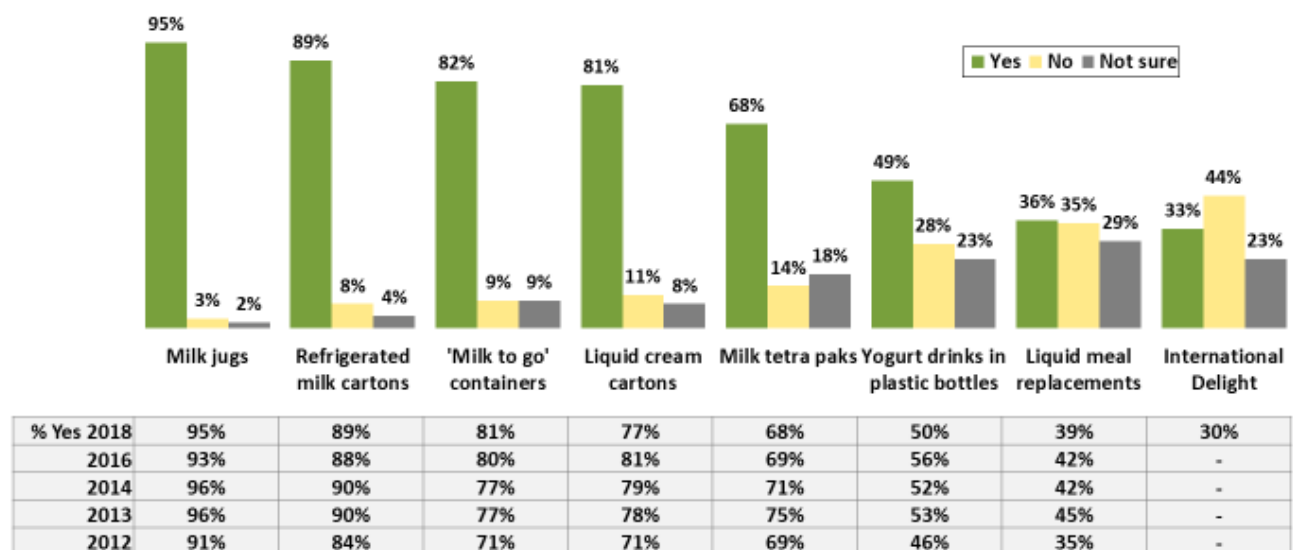
Awareness that many dairy containers can be returned for a refund remains high and there have been no significant gains in the past five years. Fewer Albertans are aware that yogurt drinks in plastic bottles are redeemable and only one-third are aware that Albertans can recycle liquid meal replacements and International Delight containers for a refund.

Awareness that most types of **dairy containers** can be returned for a refund is solid: 95% for milk jugs; 89% for refrigerated milk cartons; 82% for 'milk-to-go' containers; 81% for liquid cream cartons; and, 68% for milk tetra paks. Results are similar to those gleaned two years ago.

Awareness of the refundable deposit on yogurt drinks (49%) and liquid meal replacements (36%) continue to lag. Notably, a sizable portion of the population (nearly one-quarter or more) are not sure if yogurt drinks, liquid meal replacements, and International Delight containers can be returned for a refund. Since the benchmark gathered in 2018, awareness that International Delight can be returned for a refund is edging up to 33% (yet remains statistically on par with 30% in 2018).

What can be returned for a refund? (3/4)

Dairy containers



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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001 / 2014 n=1,000 / 2013 n=1,007)

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 with milk cartons (67%) and liquid cream cartons (62%).

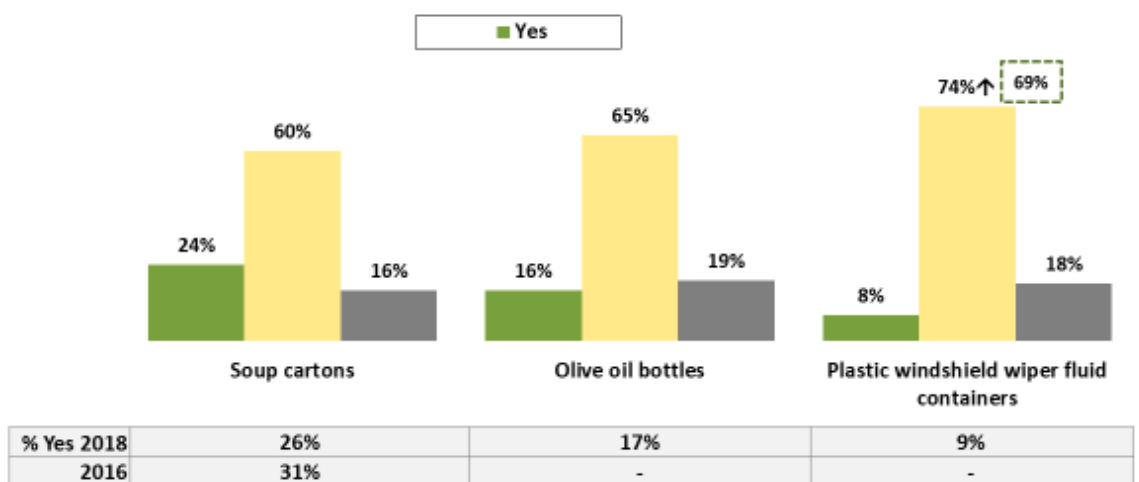
The majority of Albertans are correct in their assessment of three types of non-redeemable containers and are confident that they cannot be returned for a refund.

Roughly one-quarter (24%) of Albertans think soup cartons can be returned to a bottle depot for a refund. Though still a notable minority, this is continuing to edge down from the benchmark in 2016 (31%). Conversely, 60% of Albertans acknowledge that soup cartons cannot be returned for a refund.

Statistically consistent with 2018 results, just 16% think olive oil bottles can be redeemed and 8% say plastic windshield wiper fluid containers can be redeemed. The proportion of those who say these containers cannot be returned for a refund has significantly increased from 69% in 2018 to 74% in 2020. Still, one should note that about one-in-five say they are not sure about whether each of the containers can be returned for a refund.

What can be returned for a refund? (4/4)

Non-redeemable containers



↑ statistically higher than 2018

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, 2020 n=1,001 / 2018 n=1,006 / 2016 n=1,001)

Significantly different than 2018

Overall, **confusion** (e.g. those who are 'not sure') is highest for the ability to redeem:

- 'Bag-in-a-box' wine (33%);
- Liquid meal replacements (29%);
- Yogurt drinks in plastic bottles (23%);
- International Delight (23%);
- Foil juice pouches (23%);

- Olive oil bottles (19%);
- Plastic windshield wiper fluid containers (18%);
- Soup cartons (16%); and,
- Juice cans (11%).

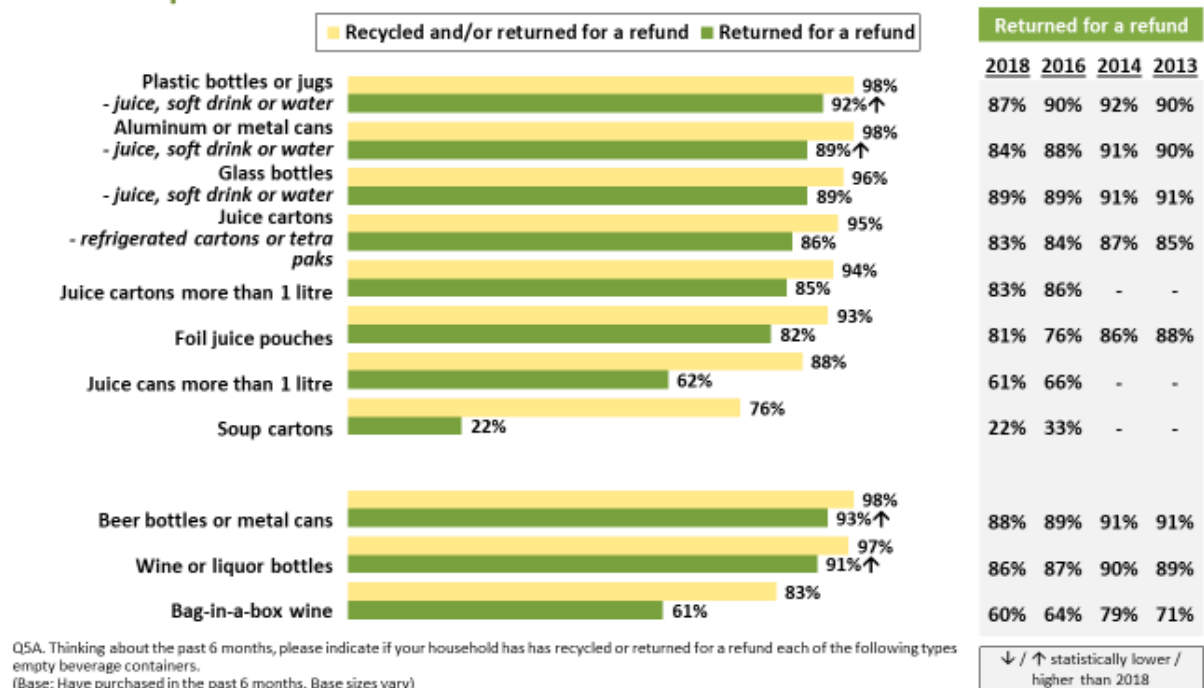
Incidence of Beverage Container Recycling and Redemption by Type of Container

Among Albertans who have purchased each type of redeemable beverage container, reported incidence of recycling and/or redemption exceeds the 80% mark for most categories. Reported incidence of redemption is somewhat lower for juice cans more than 1 litre, 'bag-in-a-box' wine and liquid meal replacements.

When asked what their household does with **soft drink, juice and water beverage containers** purchased, the highest incidence of returning them for a refund is found among: plastic bottles or jugs (92%, increased from 87% in 2018); aluminum or metal cans (89%, also up from 84% in 2018); and, glass bottles (89%, identical to 89% two years ago). Next, a large majority of households are returning the following beverage containers for a refund: juice cartons (86%, consistent with 83% in 2018); juice cartons more than 1 litre (85%, on par with 83% in 2018); and, foil juice pouches (82%, similar to 81% two years ago).

Redemption is less common for juice cans more than 1 litre (62%, on par with 61% in 2018) and is notably lower for soup cartons (22%, identical to results two years ago).

What does your household do with these beverage containers? (1/2) Past 6 months purchasers



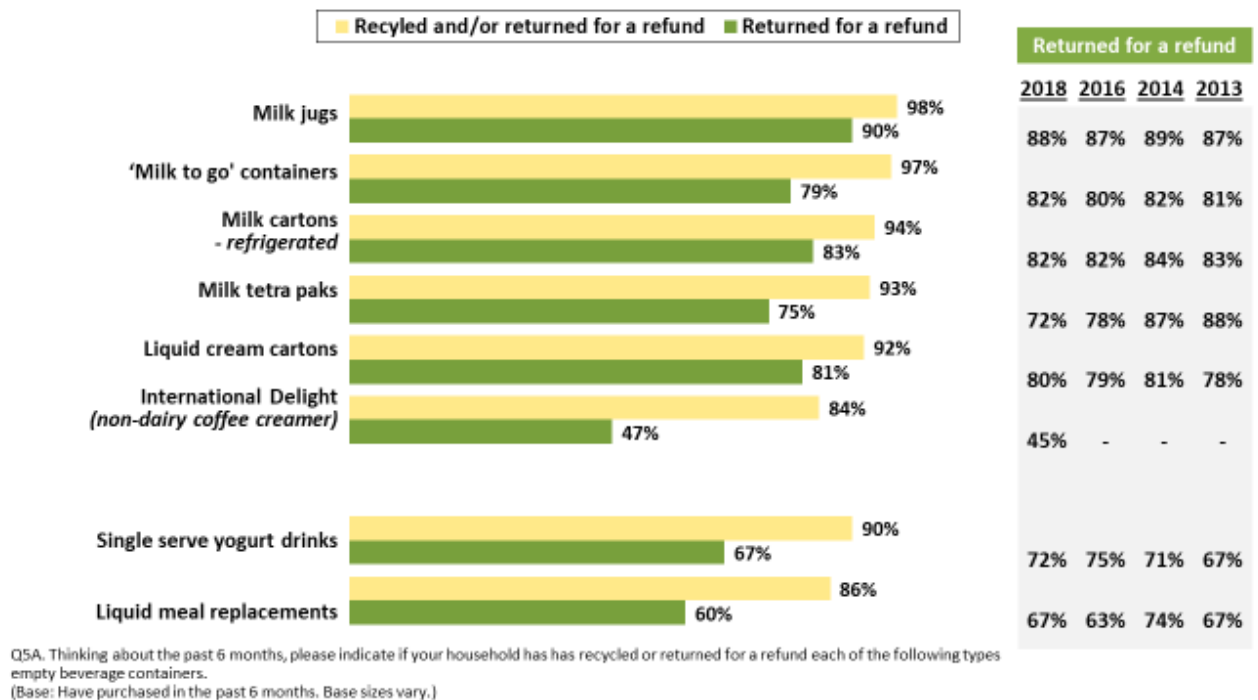
As for **alcohol containers**, 93% of Alberta households are redeeming beer bottles or metal cans (increased from 88% in 2018), 91% are redeeming wine or liquor bottles (up from 86% in 2018), and 61% are returning 'bag-in-a-box' wine containers for a refund (similar to 60% in 2018).

With respect to **dairy beverage containers**, many Albertans who have purchased these items are recycling milk jugs (90%, similar to 88% in 2018), refrigerated milk cartons (83%, on par with 82% in 2018), liquid cream cartons (81%, consistent with 80% in 2018), 'milk-to-go' containers (79%, similar to 82% in 2018), and milk tetra paks (75%, consistent with 72% in 2018). Slightly less than one-half of Albertans (47%), however, are returning International Delight containers for a refund, showing a steady rate of redemption since 2018 (45%).

In addition, two-thirds (67%) of Albertans say their household returns single serve yogurt drinks for a refund (slightly down from 72% in 2018) and 60% report redeeming liquid meal replacement containers, also slightly down from 67% in 2018.

What does your household do with these beverage containers? (2/2)

Past 6 months purchasers



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 for this group, redemption is also significantly *lower* for some container types. Most notable are redemption of aluminum or metal cans (juice, soft drinks or water) (82% vs. 89% overall), and milk cartons (66% vs. 83% overall).

Redemption is also significantly lower among Albertans aged 18 to 34 years for some container types including wine or liquor bottles (87% vs. 91% overall), refrigerated milk containers (75% vs. 83% overall), juice cans more than 1 liter in size (52% vs. 62% overall) and International Delight (37% vs. 47% overall).

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

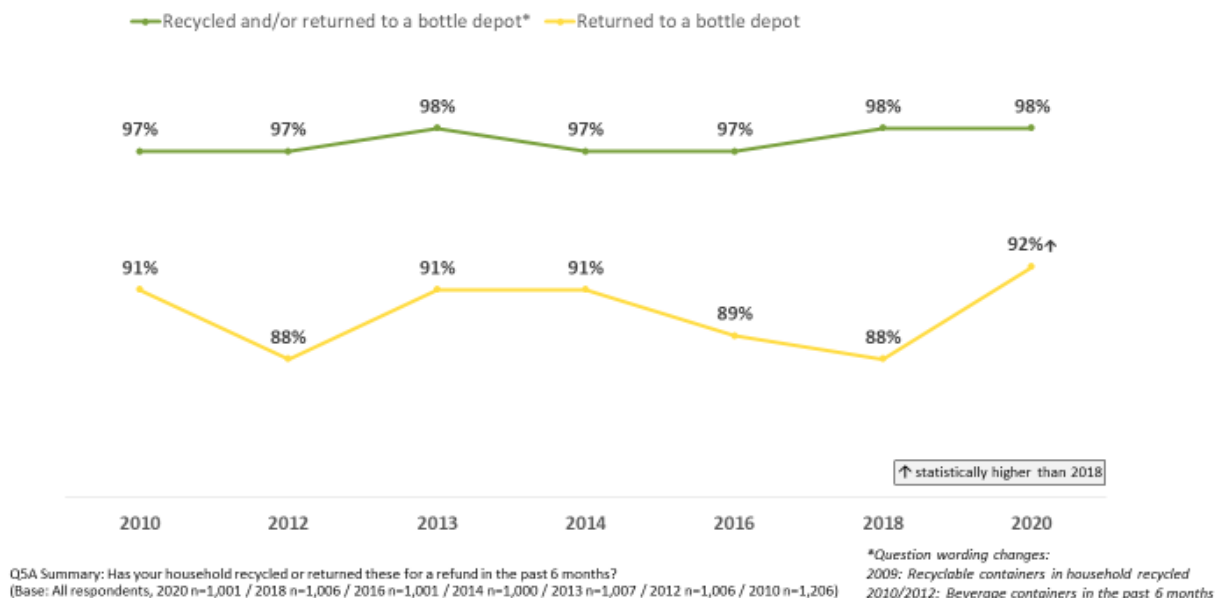
- Liquid meal replacements (52% among those with curbside recycling vs. 79% without);
- International Delight (43% among those with curbside recycling vs. 61% without); and,
- Juice cartons (83% among those with curbside recycling vs. 92% without).

Overall Incidence of Beverage Container Recycling and Redemption

Reported recycling and/or redemption of beverage containers in the past six months remains near universal among Albertans, while those who said they have returned containers to a bottle depot has significantly increased since the dip seen in 2018.

Fully 98% of Albertans report having recycled and/or returned beverage containers for a refund in the past six months, which has remained steady since 2018 (98%). After seeing a decline in returning beverage containers for a refund in 2018 (88%), the proportion of Albertans doing so in 2020 has notably increased (92%) to its highest point since tracking began.

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



Reported incidence of redemption is significantly lower in Edmonton (88%) than in the Rural North (97%). It is also *lower* among those who live in a household of one or two people (89% of those living alone, 90% of those living in a two-person household) compared with those living in a household of four or more (96%). It is also *lower* among residents who have lived in Alberta for five years or less (84% vs. 93% of those who have lived in Alberta for more than 11 years).

Tracking Behaviours with Empty Beverage Containers

In 2020, an increased proportion of Albertans are returning five different types of empty beverage containers to bottle depots for a refund: plastic bottles or jugs; aluminum or metal cans; beer bottles or metal cans; wine or liquor bottles; and, milk jugs.

With plastic bottles or jugs, fully 88% of Albertans report that they most often return them to a bottle depot for a refund (notably increased from 83% in 2018), whereas 5% say they recycle them and 3% donate them to a charity.

Next, 86% say they return aluminum or metal cans to a bottle depot most often, also up significantly from 79% in 2018, and 7% recycle them. A sizeable majority (87%) also return glass bottles for a refund, similar to 84% in 2018, and 4% recycle them (down from 8% in 2018).

More than eight-in-ten (83%) are returning juice cartons/refrigerated tetra paks for a refund, on par with 78% in 2018, and 8% are recycling such items. With respect to juice cartons of more than one litre, 83% are returning them for a refund most often, also similar to 78% in 2018, and an additional 9% are recycling them.

What do you do with empty beverage containers most often? (1/4)

| | Juice, soft drink or water | | | | | | Juice | | | |
|----------------------------------------------------------|----------------------------|---------------|------------------------|---------------|---------------|---------------|------------------------------------------|---------------|------------------------|---------------|
| | Plastic bottles or jugs | | Aluminum or metal cans | | Glass bottles | | Juice cartons-refrigerated or tetra paks | | Juice cartons >1 litre | |
| | 2020 n=898 | 2018 n=931 | 2020 n=806 | 2018 n=839 | 2020 n=641 | 2018 n=615 | 2020 n=544 | 2018 n=594 | 2020 n=429 | 2018 n=484 |
| Return to a bottle depot for a refund | 88%↑ | 83% | 86%↑ | 79% | 87% | 84% | 83% | 78% | 83% | 78% |
| Recycle via a blue box/ blue cart or curb side recycling | 5% | 8% | 7% | 9% | 4%↓ | 8% | 8% | 10% | 9% | 10% |
| Dispose of it in the garbage | 1% | 1% | 1% | 1% | 1% | 1% | 2% | 2% | 3%↑ | 1% |
| Recycle via recycling bins in public areas | 1% | 2% | 2% | 3% | 1% | 1% | 1% | 2% | 1% | 2% |
| Donate to a charity | 3% | 4% | 2%↓ | 4% | 2% | 4% | 2%↓ | 5% | 2%↓ | 5% |
| Leave for bottle collectors | 1% | 1% | 1% | 2% | 1% | 1% | 0% | 1% | 0% | 1% |
| Don't know | 2% | 1% | 1% | 2% | 4%↑ | 1% | 4% | 2% | 3% | 3% |

Q5b1. What does your household do with this type of empty beverage container most often?
(Base: Have purchased certain type of container in past 6 months, base sizes vary)

↓ / ↑ statistically lower / higher than 2018

In addition, 75% of Albertans are most often returning foil juice pouches to a bottle depot for a refund, similar to 77% two years ago, 12% recycle them and 6% dispose of them in the garbage. For juice cans of more than one litre in size, 56% are returning them to a bottle depot, on par with 54% in 2018, 25% most often choose to recycle them, and 9% put them in the garbage.

With respect to alcohol beverage containers, the vast majority (91%) are returning beer bottles or metal cans to a bottle depot for a refund, significantly increased from 84% in 2018, and 3% are recycling these items, notably down from 6% two years ago. A large majority (87%) of Albertans are also returning wine or liquor bottles for a refund, notably up from 82% in 2018, and 4% are recycling them, down from 7% in 2018. Fewer Albertans are most often returning 'bag-in-a-box' wine containers (53%, consistent with 56% in 2018), 20% are recycling them, and 10% are disposing of them in the garbage.

What do you do with empty beverage containers most often? (2/4)

| | Juice, soft drink or water | | | | Alcohol | | | | | |
|----------------------------------------------------------|----------------------------|---------------|---------------------|---------------|----------------------------|---------------|------------------------|---------------|-----------------|---------------|
| | Foil juice pouches | | Juice cans >1 litre | | Beer bottles or metal cans | | Wine or liquor bottles | | Bag-in-box wine | |
| | 2020 n=117 | 2018 n=134 | 2020 n=220 | 2018 n=247 | 2020 n=654 | 2018 n=692 | 2020 n=700 | 2018 n=726 | 2020 n=99 | 2018 n=114 |
| Return to a bottle depot for a refund | 75% | 77% | 56% | 54% | 91%↑ | 84% | 87%↑ | 82% | 53% | 56% |
| Recycle via a blue box/ blue cart or curb side recycling | 12% | 10% | 25% | 18% | 3%↓ | 6% | 4%↓ | 7% | 20% | 22% |
| Dispose of it in the garbage | 6% | 4% | 9% | 7% | 0% | 1% | 1% | 1% | 10% | 5% |
| Recycle via recycling bins in public areas | 1% | 2% | 3%↓ | 9% | 1% | 1% | 1% | 1% | 4% | 6% |
| Donate to a charity | 0% | 1% | 1% | 3% | 2% | 4% | 2%↓ | 5% | 1% | 4% |
| Leave for bottle collectors | 0% | 1% | 1% | 1% | 0%↓ | 2% | 1% | 2% | 1% | 2% |
| Don't know | 6% | 5% | 5% | 7% | 2% | 1% | 4% | 2% | 11% | 5% |

Q5b1. What does your household do with this type of empty beverage container most often?
(Base: Have purchased certain type of container in past 6 months, base sizes vary)

↓ / ↑ statistically lower / higher than 2018

Another significant increase is seen for the incidence of most often returning milk jugs to bottle depots for a refund (89% in 2020, up from 83% in 2018), with an additional 6% recycling them. Three-quarters (76%) of Albertans most often return their 'milk-to-go' containers to bottle depots, similar to 78% in 2018, while 13% recycle them.

Eight-in-ten (81%) most often return their milk cartons to bottle depots, on par with 77% in 2018, whereas 8% recycle them and 5% dispose of them in the garbage. As for milk tetra paks, 63% most often return them to bottle depots for a refund, consistent with 65% in 2018, and 17% recycle them.

Liquid cream cartons are most often returned to bottle depots by 78% of Albertans, similar to 75% in 2018, 10% recycle them, and 6% dispose of them in the garbage. Fewer (44%) Albertans most often return International Delight containers to bottle depots, statistically unchanged from 39% in 2018, 28% recycle them, and 14% dispose of them in the garbage.

What do you do with empty beverage containers most often? (3/4)

| | Dairy and dairy alternative | | | | | | | | | | | |
|----------------------------------------------------------|-----------------------------|---------------|-------------------------|---------------|-----------------------------|---------------|-----------------|---------------|----------------------|---------------|-----------------------|---------------|
| | Milk jugs | | 'Milk to go' containers | | Milk cartons - refrigerated | | Milk tetra paks | | Liquid cream cartons | | International Delight | |
| | 2020 n=134 | 2018 n=153 | 2020 n=210 | 2018 n=232 | 2020 n=845 | 2018 n=854 | 2020 n=150 | 2018 n=145 | 2020 n=617 | 2018 n=608 | 2020 n=292 | 2018 n=294 |
| Return to a bottle depot for a refund | 89%↑ | 83% | 76% | 78% | 81% | 77% | 63% | 65% | 78% | 75% | 44% | 39% |
| Recycle via a blue box/ blue cart or curb side recycling | 6% | 8% | 13% | 9% | 8% | 10% | 17% | 15% | 10% | 13% | 28% | 32% |
| Dispose of it in the garbage | 2% | 1% | 3% | 2% | 5% | 3% | 2% | 3% | 6% | 4% | 14% | 12% |
| Recycle via recycling bins in public areas | 1% | 2% | 4% | 3% | 1% | 2% | 4% | 6% | 1% | 2% | 5% | 8% |
| Donate to a charity | 1%↓ | 3% | 1% | 2% | 2% | 4% | 1% | 4% | 2% | 3% | 0% | 2% |
| Leave for bottle collectors | 0% | 1% | 0% | 1% | 0%↓ | 1% | - | - | 0% | 1% | 0% | 1% |
| Don't know | 1% | 1% | 3% | 5% | 3% | 2% | 13% | 7% | 3% | 2% | 8% | 6% |

Q5b1. What does your household do with this type of empty beverage container most often?
(Base: Have purchased certain type of container in past 6 months, base sizes vary)

↓ / ↑ statistically lower / higher than 2018

Next, two-thirds (65%) of Albertans most often return single serve yogurt drinks to bottle depots for a refund, consistent with 69% in 2018, 18% recycle them, and 9% dispose of them in the garbage, notably up from 3% in 2018.

With liquid meal replacement containers, 57% are returning them to a bottle depot, similar to 61% in 2018, 22% are recycling them, and 9% are disposing of them in the garbage, increased from 3% two years ago.

Lastly, 17% of Albertans are most often returning soup cartons to bottle depots, on par with 15% in 2018, whereas 48% are recycling them, and 20% are placing them with their waste.

What do you do with empty beverage containers most often? (4/4)

| | Miscellaneous | | | | | |
|----------------------------------------------------------|----------------------------|---------------|--------------------------|---------------|---------------|---------------|
| | Single serve yogurt drinks | | Liquid meal replacements | | Soup cartons | |
| | 2020 n=216 | 2018 n=200 | 2020 n=121 | 2018 n=136 | 2020 n=579 | 2018 n=543 |
| Return to a bottle depot for a refund | 65% | 69% | 57% | 61% | 17% | 15% |
| Recycle via a blue box/ blue cart or curb side recycling | 18% | 17% | 22% | 21% | 48% | 50% |
| Dispose of it in the garbage | 9%↑ | 3% | 9%↑ | 3% | 20% | 16% |
| Recycle via recycling bins in public areas | 5% | 4% | 4% | 4% | 7% | 11% |
| Donate to a charity | 0% | 2% | 1% | 3% | 0%↓ | 3% |
| Leave for bottle collectors | 0% | 1% | 1% | 1% | 0% | 1% |
| Don't know | 2% | 3% | 7% | 6% | 7% | 4% |

Q5b1. What does your household do with this type of empty beverage container most often?
(Base: Have purchased certain type of container in past 6 months, base sizes vary)

↓ / ↑ statistically lower / higher than 2018

Overall, those who have curbside recycling services are less likely to return the following beverage containers to bottle depots for a refund:

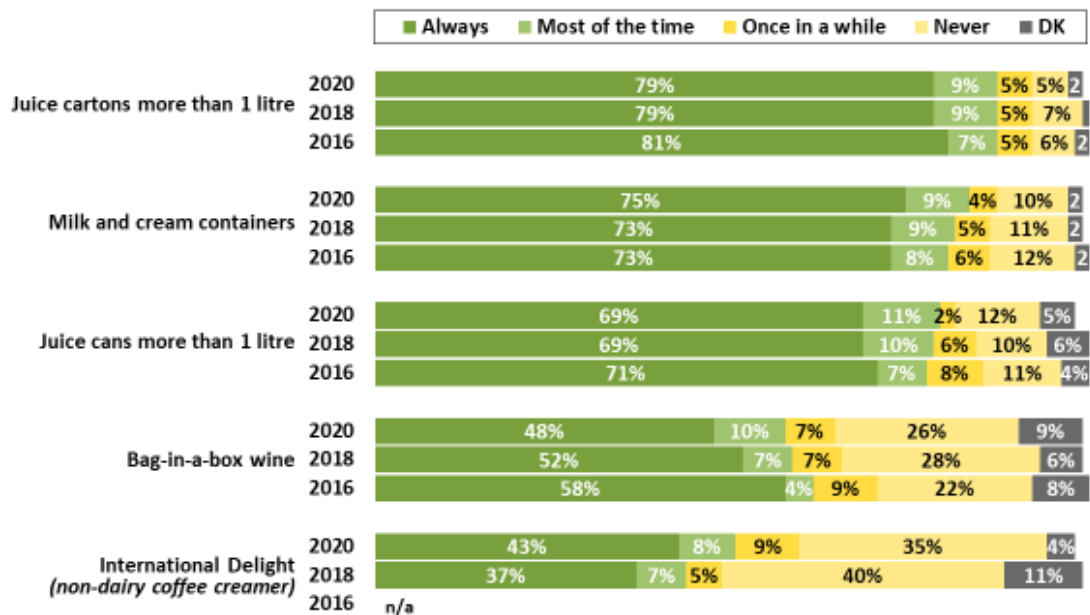
- Wine liquor bottles (85% with curbside recycling vs. 93% without);
- Juice cartons/refrigerated tetra paks (80% with curbside recycling vs. 89% without);
- Liquid meal replacements (47% with curbside recycling vs. 79% without);
- International Delight (40% with curbside recycling vs. 56% without); and,
- Soup cartons (14% with curbside recycling vs. 23% without).

Frequency of Returning Lower Return Rate Containers

Among the five container types with lower return rates, the frequency of reported redemption is substantially lower for International Delight containers and 'bag-in-a-box' wine containers.

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' (79%) or 'most of the time' (9%), while this drops slightly for *milk and cream* containers (84%) and *juice cans more than 1 litre* in size (80%). The frequency of redemption is notably lower for 'bag-in-a-box' wine (58%) and *International Delight* (51%, although showing an upward trend from 44% in 2018).

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 beverage 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 for a refund more often. The two primary reasons are consistent across items: they did not know they could return the items to a bottle depot for a refund; and, they recycle them instead.

In the case of milk and cream containers, juice cartons and juice cans more than 1 litre in size, inconvenience also plays a role (*too much trouble, depot is too far away, too time consuming*). These results are statistically consistent with 2018.

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

| | Milk & cream containers | | International Delight | | Juice cartons >1L | | Juice cans >1L | | Bag-in-a-box wine | |
|------------------------------------------------------------------|-------------------------|---------------|-----------------------|---------------|-------------------|--------------|----------------|---------------|-------------------|---------------|
| | 2020 n=134 | 2018 n=153 | 2020 n=121 | 2018 n=136 | 2020 n=42* | 2018 n=55 | 2020 n=33* | 2018 n=37* | 2020 n=31* | 2018 n=38* |
| Didn't know you could return them to a bottle depot for a refund | 38% | 36% | 71% | 73% | 36% | 23% | 47% | 31% | 53% | 65% |
| Recycle them instead | 21% | 26% | 17% | 8% | 21% | 25% | 19% | 16% | 17% | 10% |
| Too much trouble/ don't want to bother | 13% | 13% | 6% | 6% | 11% | 15% | 13% | 18% | 7% | 6% |
| Too time consuming | 6% | 5% | 1% | 2% | 8% | 6% | 3% | 5% | - | 3% |
| Bottle depot doesn't accept them | 5% | 1% | 1% | 4% | - | - | 2% | 2% | 2% | - |
| The bottle depot is too far away | 3% | 6% | - | 1% | 5% | 13% | 3% | 13% | 13% | 5% |
| Donate to charity | 3% | 4% | - | - | 5% | 9% | 6% | 3% | - | 5% |
| Do not buy/ do not buy very often | 1% | 2% | 1% | 1% | 6% | - | - | 3% | 3% | 3% |
| Leave them for bottle collectors | 1% | - | - | - | - | - | - | - | - | - |
| No refund provided (at our depot) | 1% | - | - | 1% | - | - | - | - | - | - |
| Other | 3% | 4% | 2% | 1% | 3% | 2% | - | 5% | 3% | 3% |
| Nothing | 1% | 1% | - | - | - | 2% | 3% | 2% | 3% | - |
| Don't know | 4% | 2% | 2% | 3% | 4% | 6% | 3% | 3% | - | - |

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)

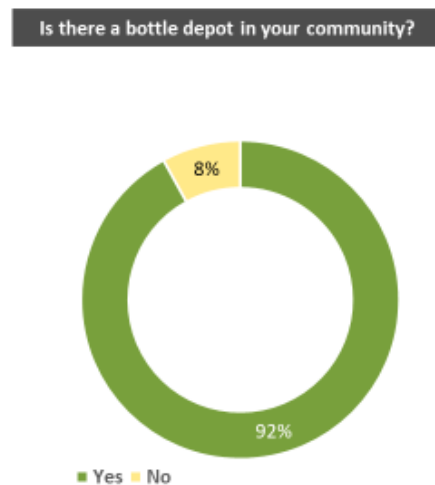
***Caution: small base size**

Community Bottle Depots

The vast majority of Albertans have a bottle depot in their local community. Most of those who do not have a local bottle depot take their empty containers to a depot outside their local community.

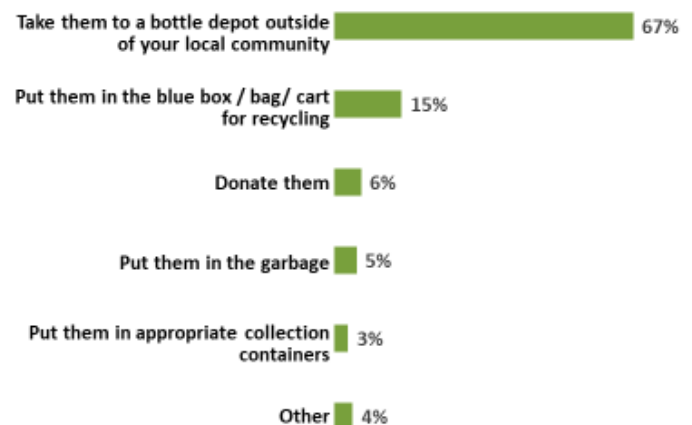
More than nine-in-ten (92%) Albertans have a bottle depot in their local community. For the eight percent who do not have a local bottle depot, two-thirds (67%) take their empty beverage containers to a bottle depot outside of their local community, 15% recycle these containers, foregoing collection of the deposit, 6% donate the containers, and 5% put them in the garbage among other alternatives.

Community bottle depot



New question in 2020
Q6C. Do you have a bottle depot in your local community?
(Base: All respondents, 2020 n=1,001)

If no local bottle depot, what do you do with your empty beverage containers?



New question in 2020
Q6D. What do you do with your empty beverage containers most often?
(Base: If they do not have a bottle depot in their local community, 2020 n=84)

Those who say they do not have a bottle depot in their local community are more likely to live in Edmonton (10% compared to 8% overall) and Calgary (14% compared to 8% overall).

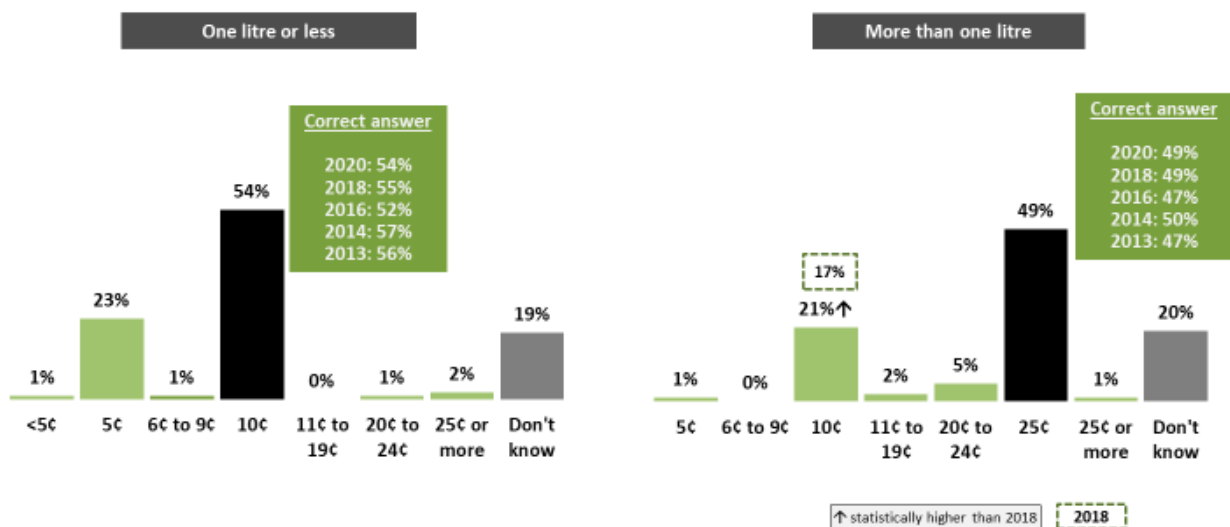
Awareness of Refundable Deposit for Beverage Containers

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

Just over half (54%) of Albertans correctly specify 10 cents as the refundable deposit on beverage containers that are *one litre or less*, while 23% say 5 cents and 19% 'don't know'. Awareness of the refundable amount is higher (60%) among those who have personally returned beverage containers to a bottle depot versus 39% among those who have not. The mean average perceived refundable deposit for beverage containers *one litre or less* is 9.3 cents and the median is 10 cents.

There is a similar pattern with awareness of the refundable deposit for containers *more than one litre* in size. One-half (49%) correctly say 25 cents, while 21% cite a refund of 10 cents and 20% say they 'don't know'. Awareness of this refundable deposit is also higher (53%) among those who have personally returned beverage containers versus 37% among those who have not. The mean average perceived refundable deposit for larger beverage containers is 20.7 cents and the median is 25 cents. For both sizes of beverage containers, Albertans' awareness of the refundable deposit has remained steady over the past several years.

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, 2020 n=1,001)

Awareness of the refundable deposit value is generally *lower* among Albertans aged 18 to 34.

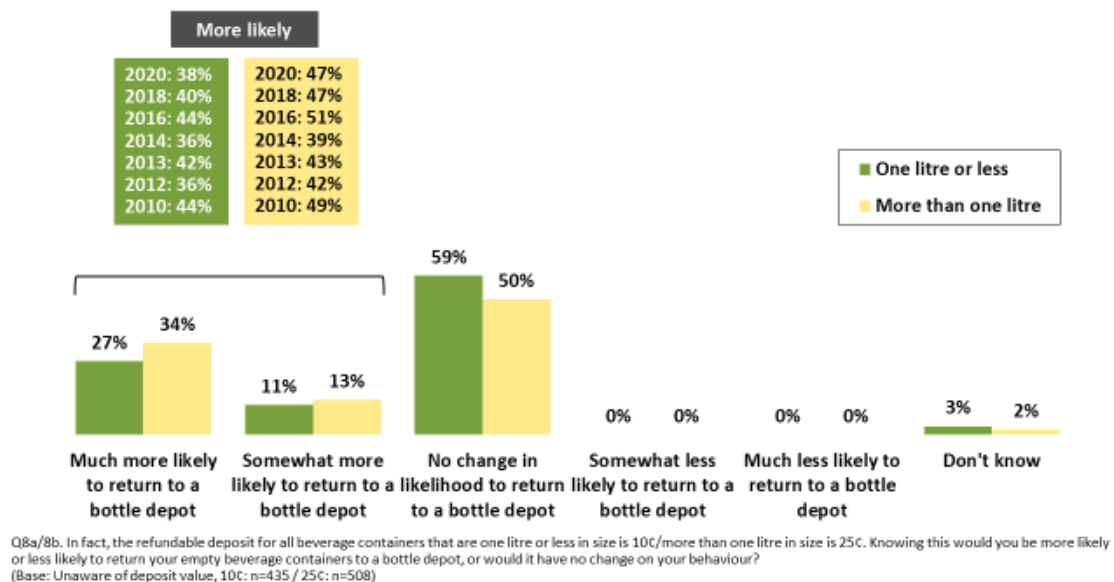
Anticipated Effect of Knowing the Refundable Deposit for Beverage Containers

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

Among those unable to cite the refundable deposit value for containers one litre or less in size, 38% say knowing the correct deposit value would make them more likely to return beverage containers for a refund, while 59% 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 effect. Just under one-half (47%) say knowing the correct deposit value would make them more likely to return larger beverage containers for a refund, while 50% say it would make no difference. Findings are statistically consistent with 2018.

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



When the data are analyzed by region, it is notable that the reported effect of knowing the deposit value is *highest* among Albertans aged between 18 and 34 – 45% say they would be ‘more likely’ to return containers 1 litre or less in size and 52% say they would be ‘more likely’ to return containers more than one litre in size.

Further, those with curbside recycling would be more likely to return beverage containers to a bottle depot after learning the value (@10 cents, 33% would be much more likely to return them vs. 12% without curbside recycling, and @25 cents, 37% would be much more likely to return items to a bottle depot vs. 25% without curbside recycling).

Recall of Information about Refundable Deposits

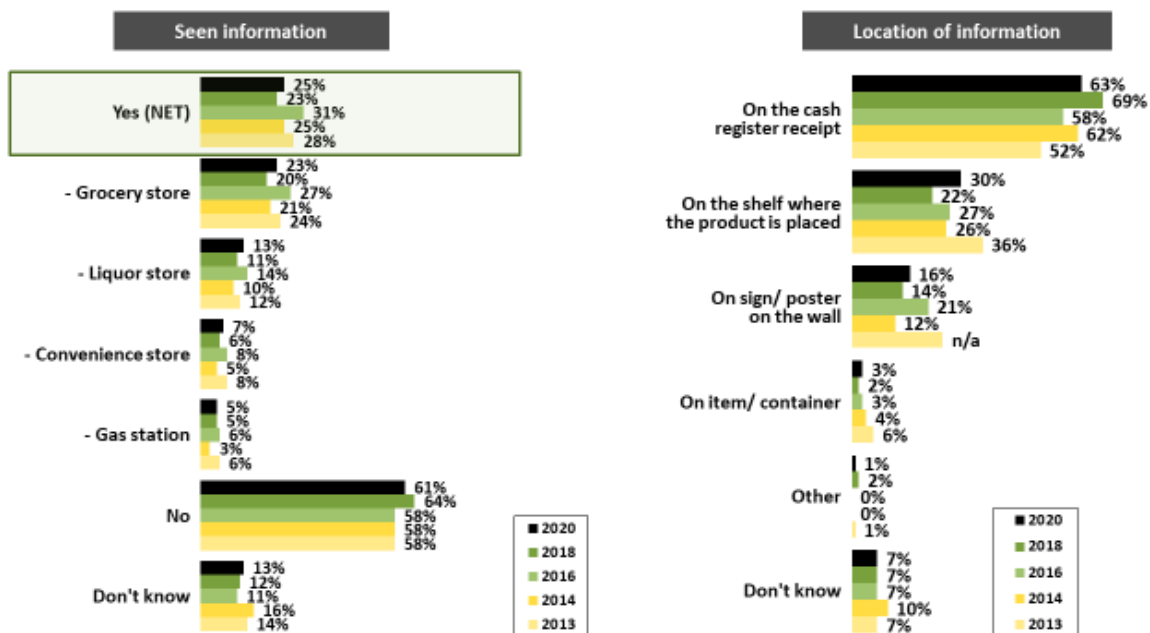
One-quarter of Albertans – consistent with 2018 – say they have seen information at retail stores that identifies the refundable deposit on beverage containers, most often on the cash register receipt or on the shelf where the product is placed.

In 2020, 25% of Albertans say they have seen information about the refundable deposit. More than two-in-ten (23%) recall seeing information at a grocery store, 13% at a liquor store, 7% at a convenience store, and 5% at a gas station.

Cash register receipts (63%) are the most common channel, followed by the shelf where the product is placed (30%), and on a sign or poster on the wall (16%).

Results have held steady since 2018.

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



BOTTLE DEPOTS

Awareness and Importance of Regulation

In 2020, nearly six-in-ten (58%) Albertans say they have seen the Depot logo – a significant 6 percentage point increase from 2018 (52%) and continuing an upward trend since 2016 (38%).

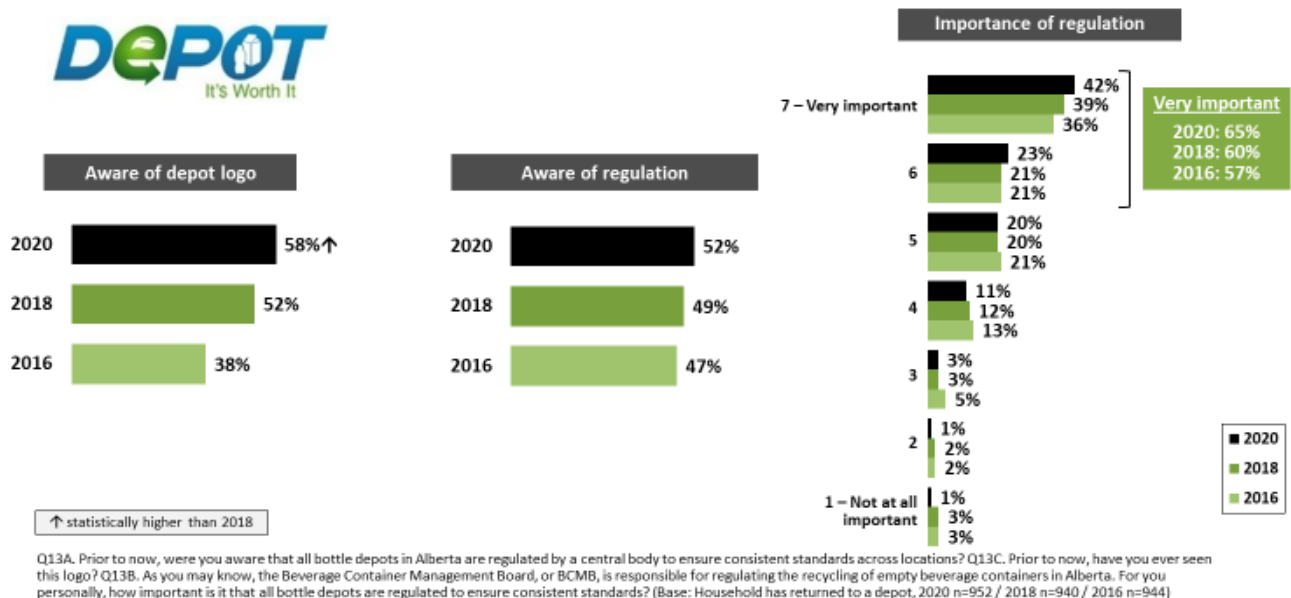
It is notable that awareness is significantly *lower* among Albertans aged 55 and over (40% compared to 58% overall).

Just over one-half (52%) of Albertans are aware of the regulation of bottle depots and the majority say it is important.

More than one-half (52%) of Albertans say they were aware that all bottle depots in Alberta are regulated by a central body, consistent with results in 2018 (49%).

When asked how important regulation is to them personally, more than eight-in-ten (85%) say it is 'important' (a rating of 5, 6 or 7 on a 7-point scale). Further, two-thirds (65%) say it is 'very important' (a rating of 6 or 7), seeing a consistent upward trend from 60% in 2018 and from 57% in 2016.

Awareness and importance of regulation



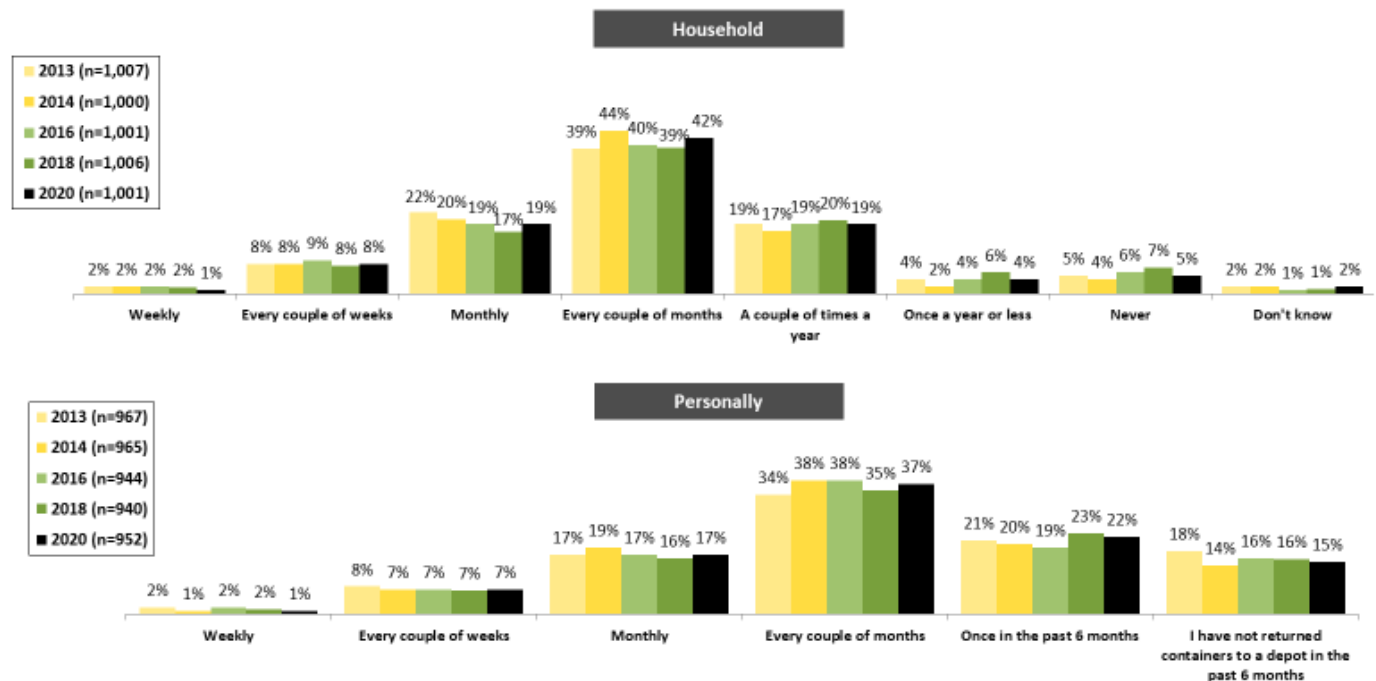
Frequency of Visitation

The frequency of returning empty beverage containers to a bottle depot has remained consistent over the past several years.

Nearly three-in-ten (28%, similar to 27% in 2018) Albertans say their household returns containers to a bottle depot at least once a month, while the plurality (42%, on par with 39% in 2018) make a trip every couple of months, 19% a couple of times a year, 4% once a year or less, and just 5% 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 personally visiting bottle depots is consistent with 2018.

How often do you return empty beverage 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)

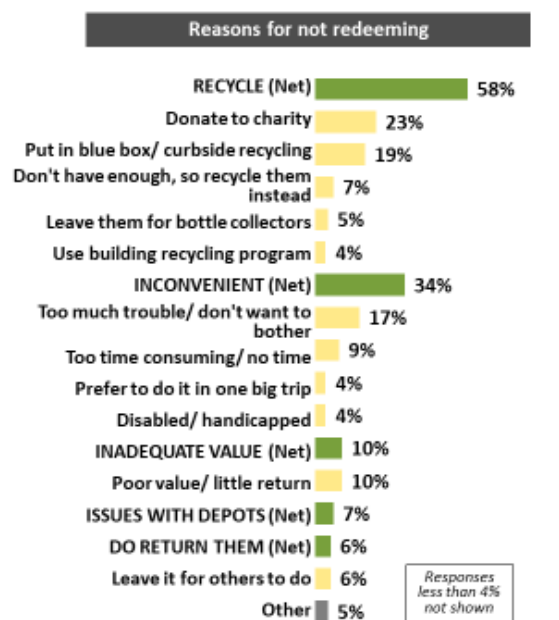
Reasons for Not Returning Beverage Containers or Not Redeeming More Often

The inconvenience of having to bring beverage containers to a bottle depot and the ability to easily recycle them at home are the primary reasons for not redeeming and not redeeming more often.

Among the small percentage (5%) of Albertans who say their household has *never* returned beverage containers to a depot, most (58%) indicate they **recycle the containers instead** – that is, by donating to a charity, recycling via an unspecified means, putting it in a blue box, leaving items for bottle collectors, or using their building’s recycling program. **Inconvenience** (34%) is also a key issue – 17% “*too much trouble*,” 9% “*too time consuming*,” 4% “*prefer to do it in one big trip*,” and 4% cite mobility issues such as “*disabled/ handicapped*.” One-in-ten (10%) say they receive little **value** from their return. Just 7% cite issues with depots themselves, saying that the “depot is too far away” or there is a “line up at the depot” or there is “poor customer service.”

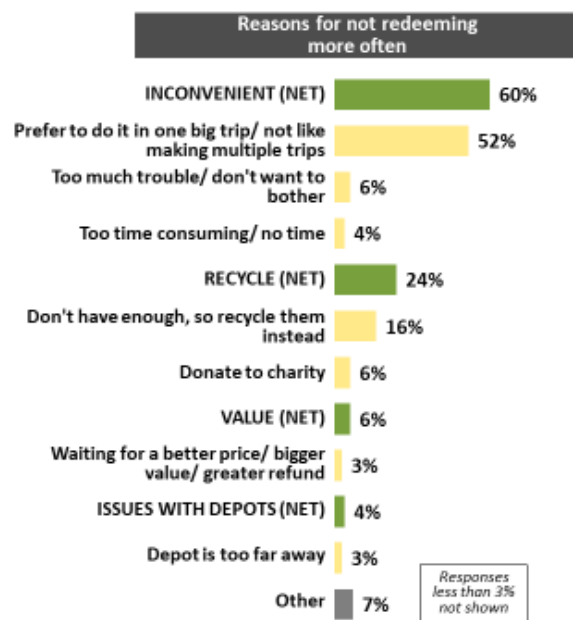
The predominant reasons for visiting a bottle depot a couple of times a year or less is that it is **inconvenient** (60%) – saying specifically that they “*do not like making multiple trips*” (52%) and that it is “*too much trouble*” (6%) and “*too time consuming*” (4%). The second most common reason is that people **recycle** instead (24%), saying that they “*don’t have enough so they recycle them instead*” (16%) or that they “*donate them to charity*” (6%).

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=49*)

*Caution: small base size



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=247)

Bottle Depots Not Accepting Certain Items and Barriers to Using Bottle Depots

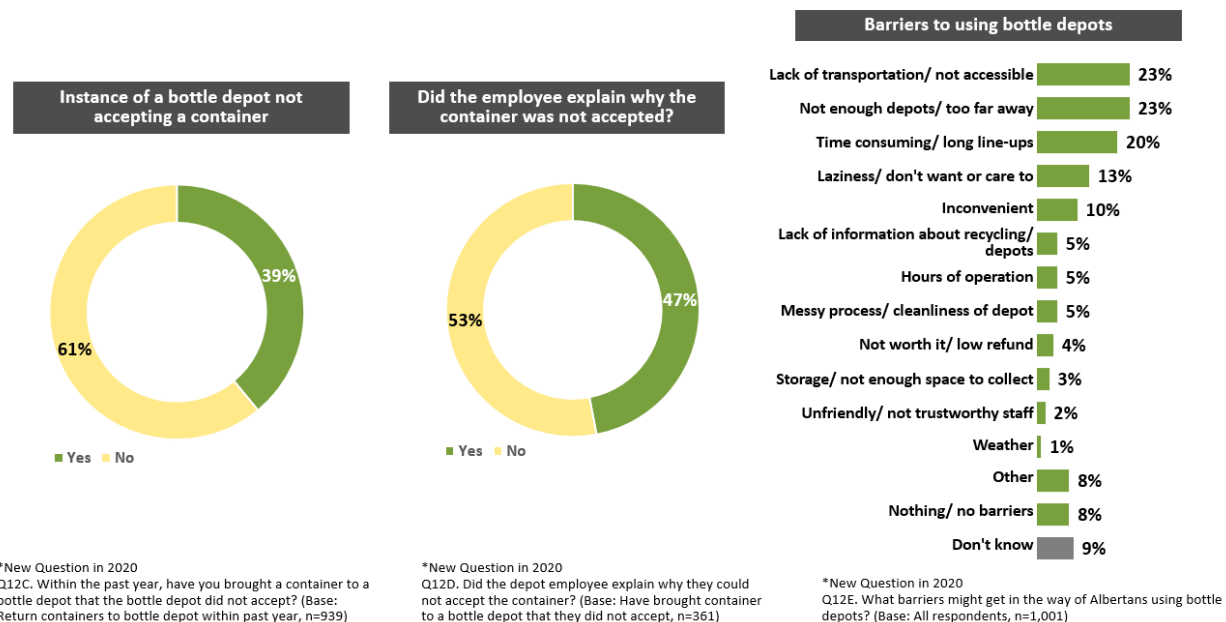
New questions asked in 2020 show that a substantial minority of Albertans have brought a container to a bottle depot that was not accepted. In almost one-half (47%) of those instances, respondents said the bottle depot employee explained why the container was not accepted and 53% report that the employee did not provide an explanation.

Nearly four-in-ten (39%) Albertans say that within the past year, they have brought a container to a bottle depot that the bottle depot did not accept. In these cases, more than one-half (53%) of Albertans say that the bottle depot employee did not explain why they could not accept the container.

The leading barriers keeping people from using bottle depots are lack of transportation, too few depots, too time consuming, and that some people may be lazy or not care enough to do it.

Albertans identify a wide range of barriers that may get in the way of Albertans using bottle depots. The three leading reasons, each with 20% or more of Albertans in agreement, are: “lack of transportation/ not accessible” (23%), “not enough depots/ too far away,” (23%) and “time consuming/ long line-ups” (20%). Additional reasons include “laziness/ don’t want or care to,” (13%) and “inconvenient” (10%). Just 8% say that there are no barriers to Albertans using bottle depots.

Barriers to using bottle depots



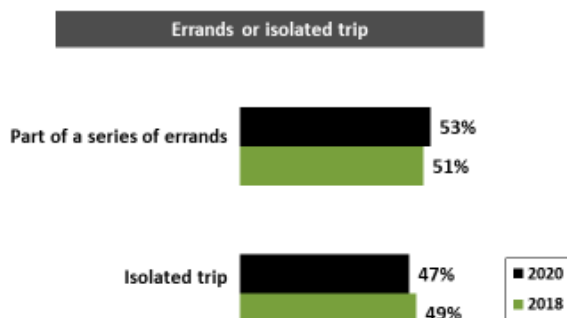
Travelling to a Bottle Depot and Reason Location is Convenient

In 2020, Albertans are split on whether they visit the bottle depot when doing a series of other errands, or whether they make a special trip when going to the depot. The majority use the depot that is close to their home rather than those that are close to shopping or work.

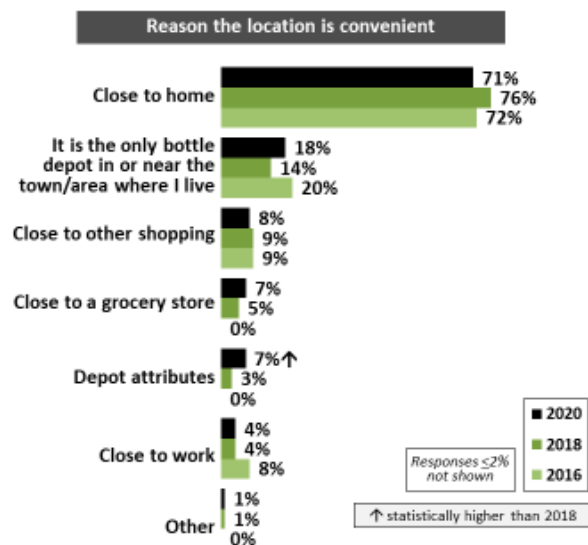
Just over one-half (53%) say they usually visit a depot as part of a series of errands while a similar proportion (47%) say it is an isolated trip. This split was also seen in 2018.

Considering the bottle depot they use most often, 71% say the location is convenient because it is *close to home*, while 18% say it is the *only depot* close to where they live. Being close to *shopping* (8%), a *grocery store* (7%) or *work* (4%) are not key convenience factors for most Albertans. Nearly one-in-ten (7%) say depot attributes are important to them, mentioning things such as the depot “*has a good reputation*,” and that the people who work there “*are honest*.”

Visiting a bottle depot



Q16NEW. When you visit a bottle depot, is it usually part of a series of errands, or an isolated trip? (Base: Return containers to bottle depot within past 6 months, 2020 n=799 / 2018 n=778)



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, 2020 n=799 / 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794 / 2012 n=772)

Albertans living in Edmonton and Calgary are most likely to say they choose their depot according to the one that is close to home (80% for Edmonton and 82% for Calgary vs. 71% overall), while Albertans in smaller cities in the North (31%), and South (19%) and in the Rural North (48%) are most likely to say that the depot they use most often is the only depot in or near their town.

Actual and Reasonable Travel Times to a Bottle Depot

One-half of Albertans travel 10 minutes or less to their bottle depot which roughly aligns with what they say a reasonable amount of time is. The majority (79%) think that it is reasonable to wait up to 10 minutes to be served at a bottle depot.

One-half (51%) of past six months visitors say it takes 10 minutes or less to get to the bottle depot they use most often, while 35% say it takes 11 to 20 minutes, and just 13% say it takes more than 20 minutes. As might be expected, Rural Albertans report longer travel times.

For the most part, the actual travel time corresponds with what Albertans think a reasonable travel time is. More than one-half (55%) of Albertans think traveling to a bottle depot should take 10 minutes or less, nearly four-in-ten think it should take between 11 and 20 minutes. Only 3% think it is reasonable for the journey to take 21 minutes or more.

In terms of what Albertans think is a reasonable amount of time to wait to be served at a bottle depot, more than one-third (36%) think they should wait 5 minutes or less. The plurality (43%) think it is reasonable to wait between 6 and 10 minutes. Nearly one-in-five (19%) think it is permissible to wait between 11 and 20 minutes.

Travel time to bottle depot and reasonable wait time at 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, 2020 n=799 / 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794)

Q16E What would be a reasonable amount of time to get to a bottle depot from your home residence? (Base: All respondents, 2020 n=1,001)

Q16D What would be a reasonable amount of time to wait to be served at a bottle depot? (Base: All respondents, 2020 n=1,001)

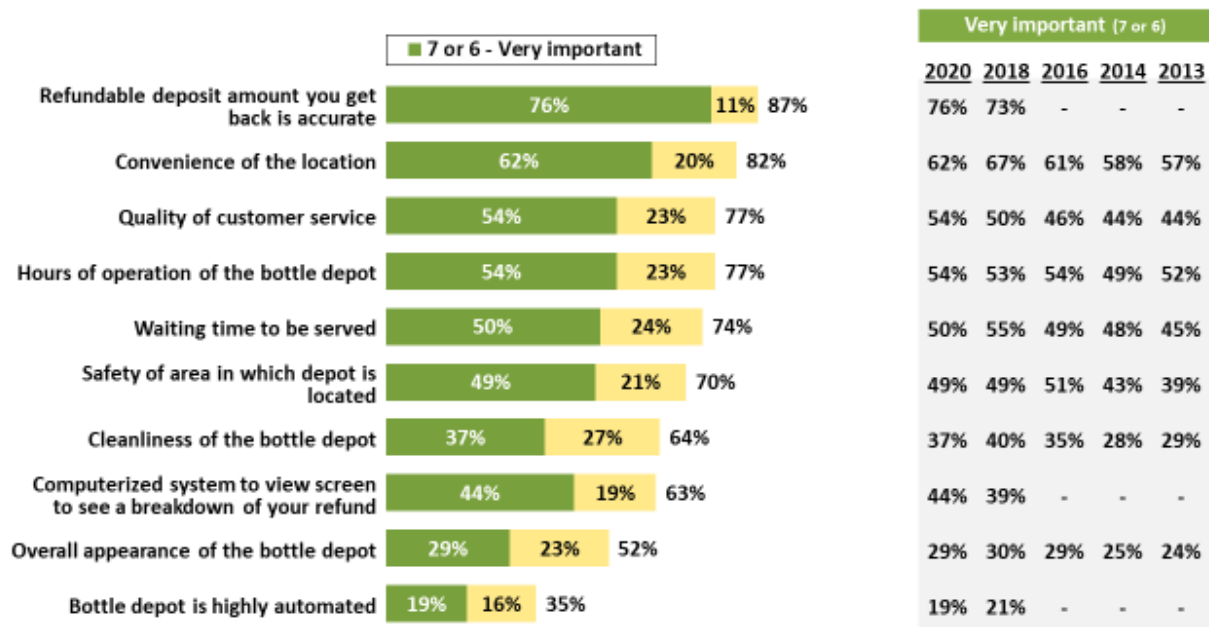
Importance of Bottle Depot Attributes

Accuracy of the refundable amount and convenience of the location are the top two most important 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* (76% 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* (62% very important), both statistically consistent with results in 2018 (73% and 67%, respectively).

In the next tier are *quality of customer service* (54% very important), *hours of operation* (54% very important), *waiting time* (50% very important), and *safety of the depot location* (49% very important), also on par with results in 2018. Comparatively less important are *cleanliness* (37% very important), having a *computerized system* (44% very important), *overall appearance* (29% very important), and *automation* (19% very important), showing stable patterns over the past two years.

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



*Question wording changes in 2018

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, 2020 n=799 / 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794)

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 should be interpreted with caution.

Satisfaction with Bottle Depot Attributes

Satisfaction with most aspects of bottle depots is highest for the depot features which are most important.

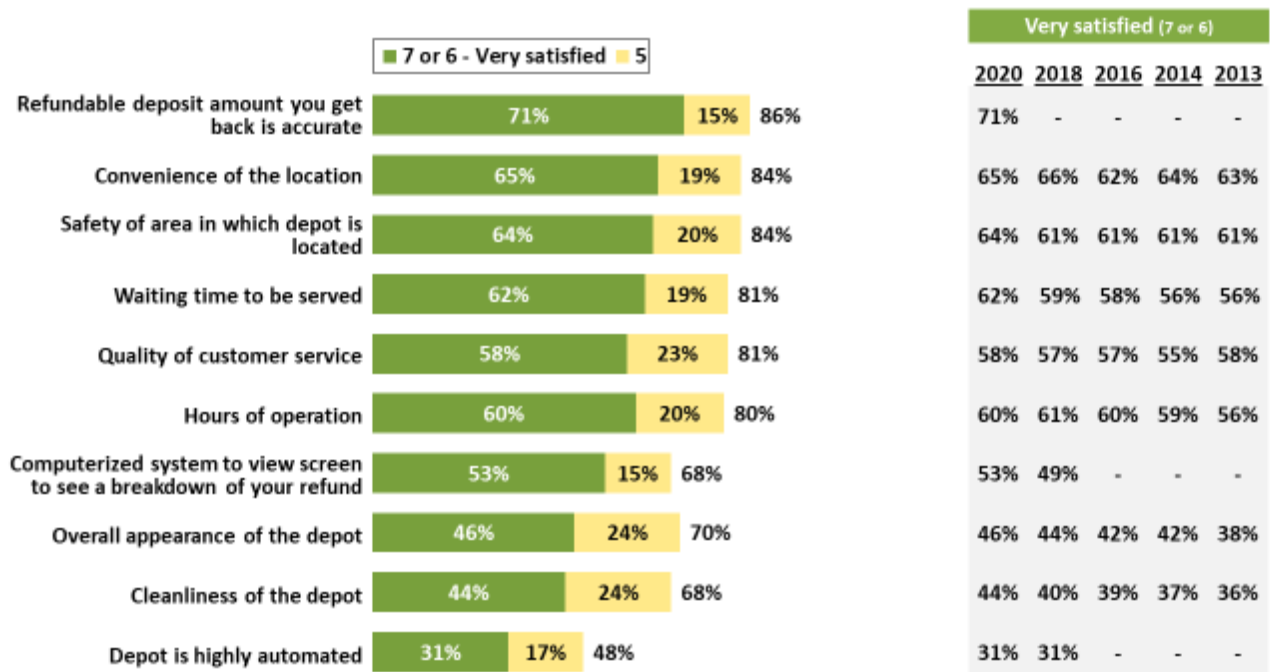
Overall satisfaction tops the eighty percent mark for six attributes, and roughly two-thirds are satisfied with another three attributes.

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 *accuracy of the refund* (71%), *convenience of the location* (65%), *safety of the area in which the depot is located* (64%), *waiting time* (62%), *customer service* (58%) and *hours of operation* (60%).

Comparatively lower is satisfaction with having a *computerized system* (53%), the *overall appearance* (46%) and *cleanliness* (44%) of the depot, and the depot being *highly automated* (31%).

Findings are consistent with satisfaction measures in 2018.

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, 2020 n=799 / 2018 n=778 / 2016 n=788 / 2014 n=833 / 2013 n=794)

Action Grid Analysis

In order to help the BCMB prioritize future efforts to improve various aspects of bottle depots, an 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:

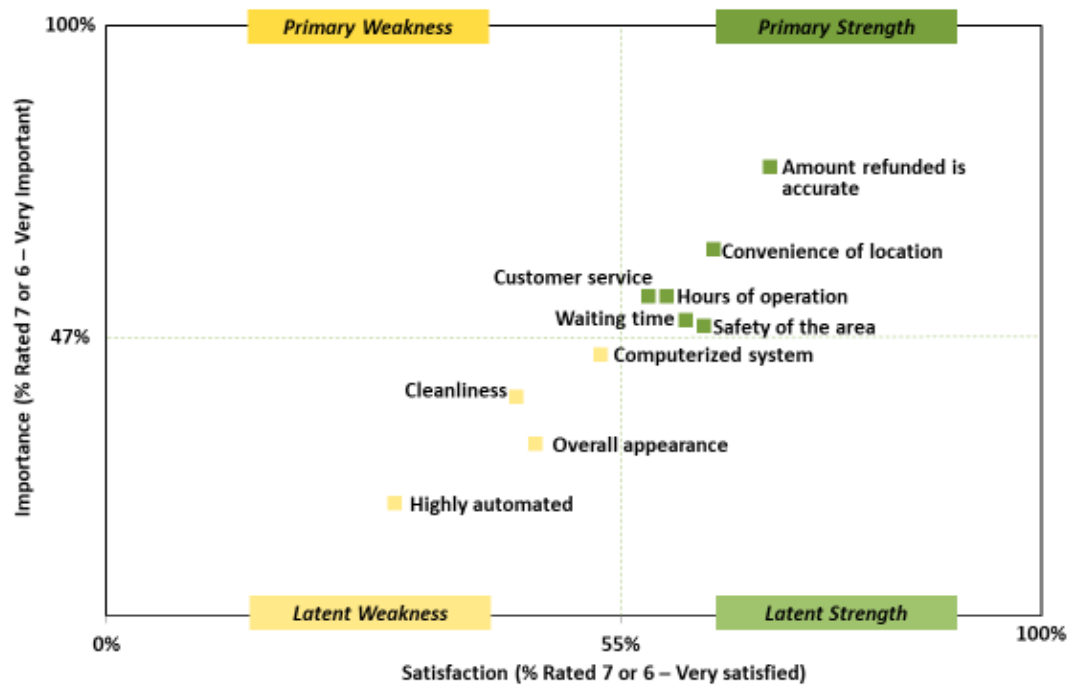
- Primary Strengths – Items in the top right quadrant are key strengths and performance should be maintained or improved.
- Primary Weaknesses – Items in the top left quadrant are ‘priority areas for improvement’ as they are considered important, however, satisfaction is relatively lower and there is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



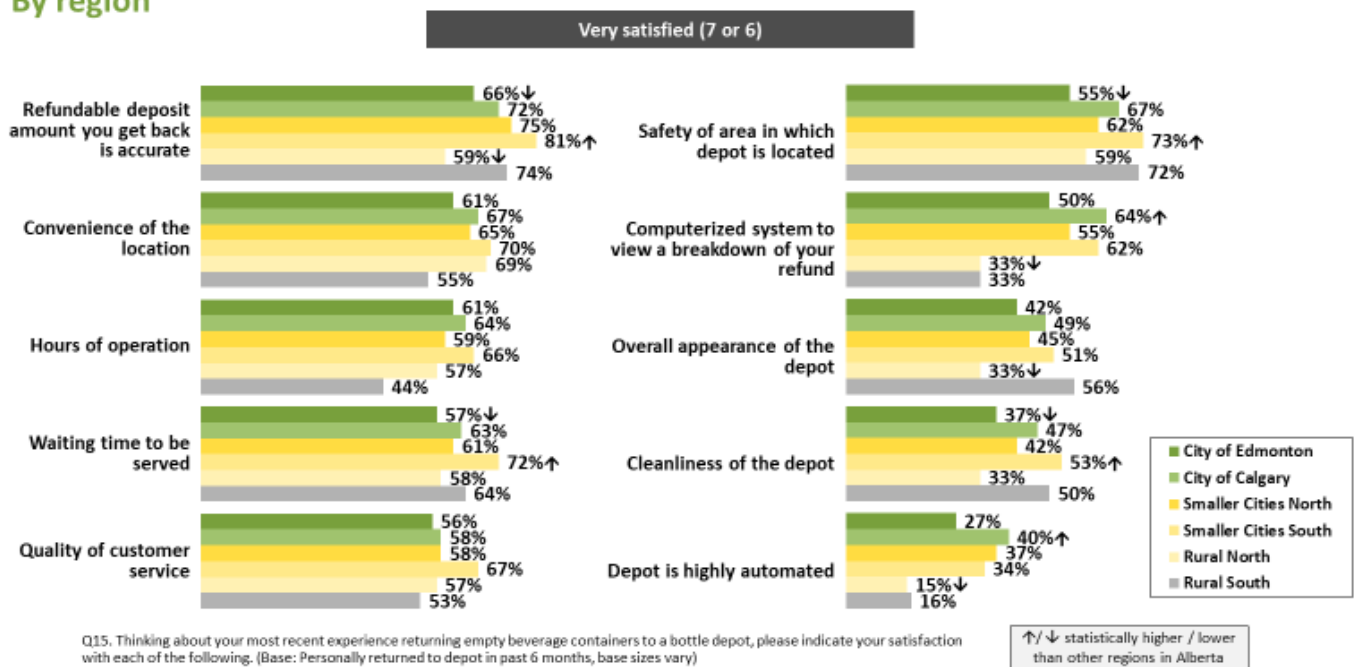
Satisfaction by Region

When examining the satisfaction results by region, we can see some variation across the province. In general, satisfaction tends to be *higher* in Smaller Cities South and *lower* among residents of Edmonton.

In terms of automation, we can see wide discrepancies between Calgary and the Rural North and South, with satisfaction being stronger in Calgary. This holds true for both having a *computerized system to view a breakdown of refund* as well as *depot is highly automated*.

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

By region



A few statistically significant regional differences are observed for satisfaction with:

- *Receiving an accurate refundable deposit amount* is significantly higher in Smaller Cities South (81%) and lower in both City of Edmonton (66%) and Rural North (59%).
- *Waiting time to be served* is significantly higher in Smaller Cities South (72%) and lower in City of Edmonton (57%).
- *Safety of the area in which the depot is located* is significantly higher in Smaller Cities South (73%) and lower in City of Edmonton (55%).
- *Having a computerized system* is significantly higher among City of Calgary (64%) and lower among Rural North (33%) and Rural South (33%).

- *Overall appearance of the depot* is significantly *lower* among residents of the Rural North (33%).
- *Cleanliness of the depot* is significantly higher in Smaller Cities South (53%) and lower in City of Edmonton (37%).
- *Highly automated depot* is significantly *higher* among residents of City of Calgary (40%) and lower in Rural North (15%).

THE OVERALL RETURN RATE

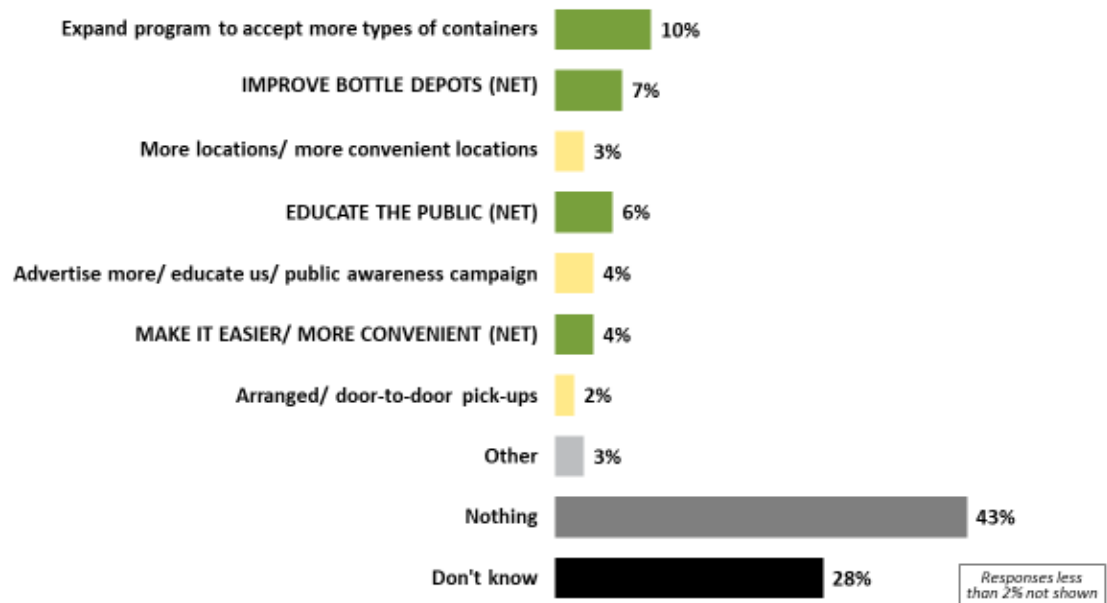
Opportunities for Increasing the Return Rate for Beverage Containers

Potential strategies to increase the number of beverage containers returned to bottle depots include allowing for more types of containers to be returned, improving bottle depots and their locations, educating the public more, and making it more convenient.

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’ (43%) or ‘don’t know’ (28%).

The most frequent suggestions are expanding the program to accept more types of containers (10%), improving various aspects of bottle depots (7%), better educating the public (6%), and making it more convenient (4%).

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=1,001)

Features to Increase Albertans' use of Bottle Depots

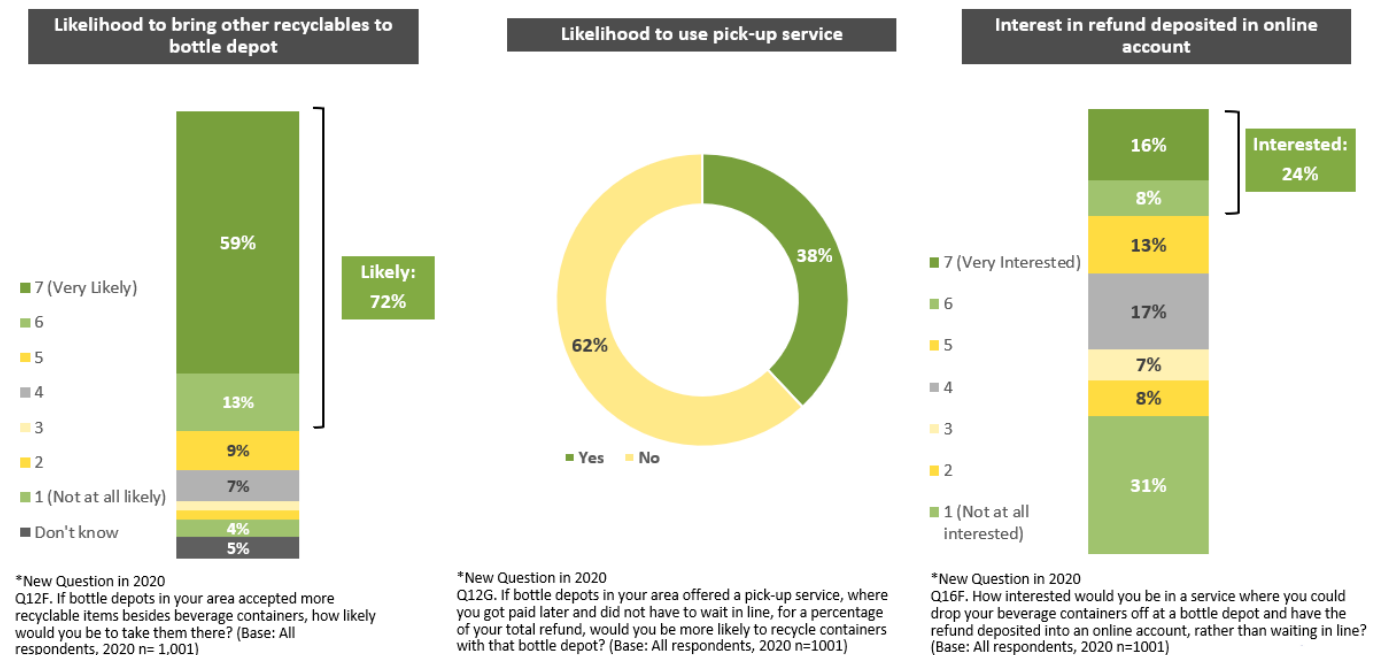
New questions were asked in 2020 about what features BCMB could implement that could increase Albertans' use of bottle depots.

The feature that received the most support was to expand the service and have bottle depots accept more recyclable items besides beverage containers. More than seven-in-ten (72%) Albertans thought this service would increase their likelihood of bringing these items to the bottle depot.

Just under four-in-ten (38%) Albertans said they would be more likely to recycle their beverage containers with a depot that offered a **pick-up service** that would pay users a percentage of their total refund at a later time.

About one-quarter (24%) of Albertans said they would be interested (a 6 or 7 on a 7-point scale) in a service where they could drop off their beverage containers at the bottle depot and have the **refund deposited in an online account** rather than waiting in line. The proportion of Albertans who said they would not be interested (a 1 or 2 on a 7-point scale) in this service is about four-in-ten (39%).

Features to increase use of bottle depots

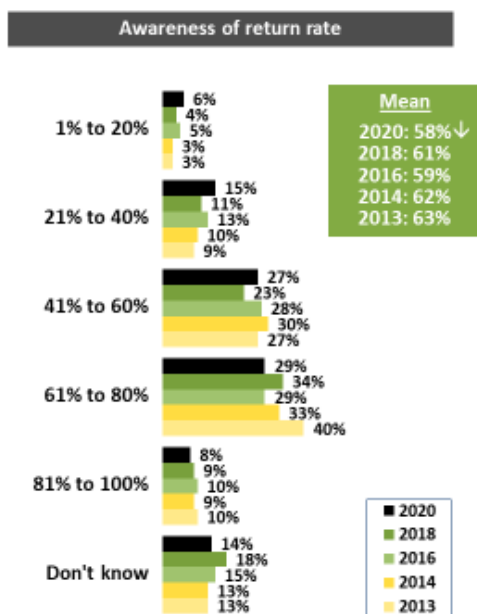


Awareness of the Overall Return Rate for Beverage Containers

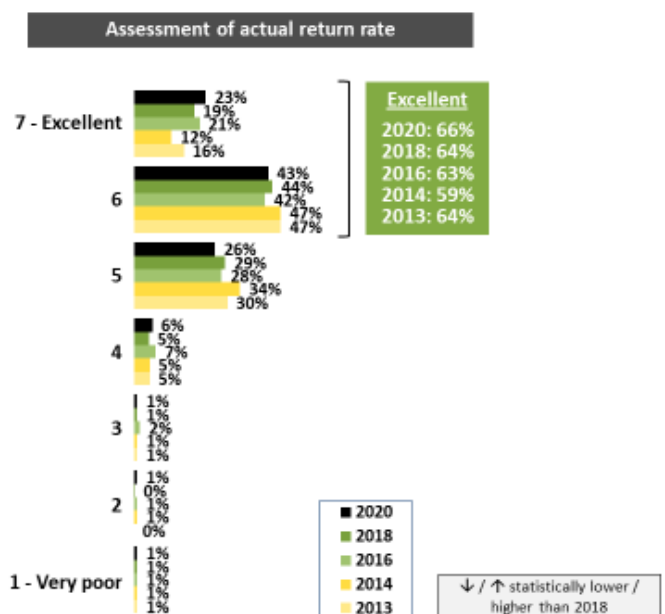
Albertans are not fully knowledgeable about the overall rate of return for beverage containers. The average guess is 58%, which is significantly down from 61% in 2018. The plurality of Albertans (29%) think the return rate is in the 61% - 80% range or 41%-60% range (27%).

When told the actual return rate in 2019 was 86%, 66% deem it as being excellent (rating of 6 or 7), while 92% offer a positive assessment. These results are consistent with 2018.

What is the return rate for beverage containers?

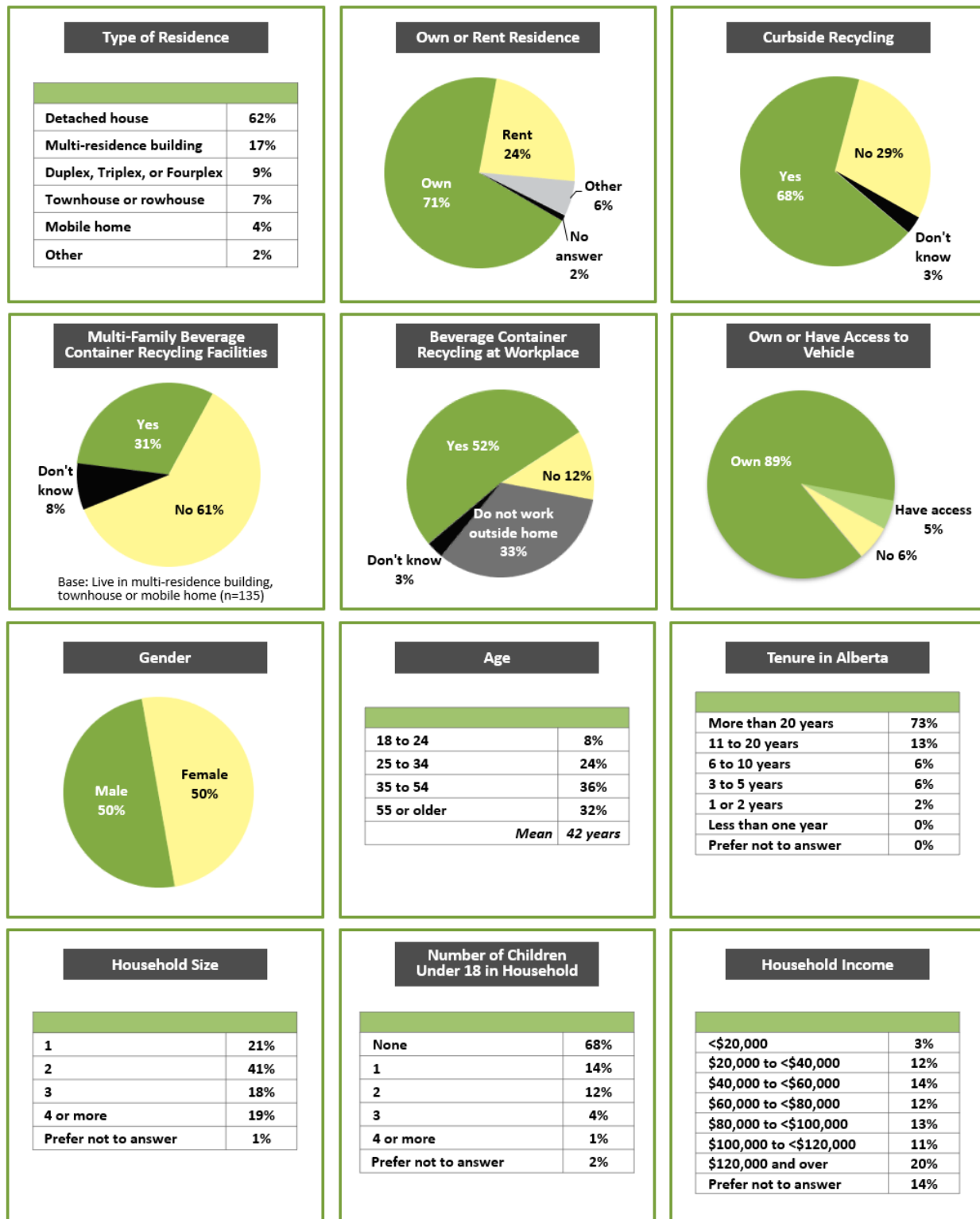


Q18. What percentage of beverage containers sold in Alberta do you think are recycled or returned to bottle depots every year? (Base: All respondents, 2020: n=1,001 / 2018: n=1,006 / 2016: n=1,001 / 2014: n=1,000 / 2013: n=1,007)



Q19. In 2019, the overall return rate for beverage containers in Alberta was 86%. Would you say this is...? (Base: All respondents, 2020: n=1,001 / 2018: n=1,006 / 2016: n=1,001 / 2014: n=1,000 / 2013: n=1,007)

RESPONDENT CHARACTERISTICS



APPENDIX A: SURVEY QUESTIONNAIRE

Beverage Container Management Board 2020 Survey of Albertans

Final Questionnaire
February 6, 2020

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.

PLEASE SET UP GRID AS FOLLOWS.

| | |
|------------------------------------------------------|----------------------------------------------------------------------------------------------|
| A) Did you know of this benefit prior to now? | B) For you personally, how important is this reason for recycling beverage containers |
| DROP-DOWN BOX | DROP-DOWN BOX |

[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

Bag-in-a-Box wine

Wine and liquor bottles (glass or plastic)

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**.

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

[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 OR INTERNATIONAL DELIGHT IN Q4, ELSE SKIP TO Q6C]

6. A. DELETED

6B. DELETED

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 Q6C]

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

The bottle depot is too far away

Too time consuming

Recycle them instead

Other (Please specify)

Don't know

6C. Do you have a bottle depot in your local community?

Yes

No

[ASK 6D IF 6C='NO']

6D. What do you do with your empty beverage containers most often?

Take them to a bottle depot outside of your local community

Donate them

Put them in the blue box/bag/cart for recycling

Put them in the garbage

Other [PLEASE SPECIFY] _____

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 bottle depot

Somewhat more likely to return to a bottle depot

No change in likelihood to return to a bottle depot

Somewhat less likely to return to a bottle depot

Much less likely to return to a bottle 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 bottle depot
Somewhat more likely to return to a bottle depot
No change in likelihood to return to a bottle depot
Somewhat less likely to return to a bottle depot
Much less likely to return to a bottle 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. DELETED

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.]

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]

[ASK Q12B IF Q11='A COUPLE OF TIMES A YEAR' OR 'ONCE A YEAR OR LESS']

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]

[ASK Q12C IF Q11='WEEKLY', 'EVERY COUPLE OF WEEKS', 'MONTHLY', 'EVERY COUPLE OF MONTHS', 'A COUPLE OF TIMES A YEAR' OR 'ONCE A YEAR OR LESS', ELSE SKIP TO Q12E]

12C. Within the past year, have you brought a container to a bottle depot that the bottle depot did not accept?

Yes
No

[ASK 12D IF Q12C=YES]

12D. Did the depot employee explain why they could not accept the container?

Yes
No

[ASK ALL]

12E. What barriers might get in the way of Albertans using bottle depots?

Please be detailed and specific in your response

[VERBATIM RESPONSE]

12F. If bottle depots in your area accepted more recyclable items besides beverage containers, how likely would you be to take them there

- 1 – Not at all likely
- 2
- 3
- 4
- 5
- 6
- 7 – Very likely
- Don't know

12G. If bottle depots in your area offered a pick-up service, where you got paid later and did not have to wait in line, for a percentage of your total refund, would you be more likely to recycle your containers with that bottle depot?

- Yes
- No

[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 Q16D]

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 bottle 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 Q16D, 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 bottle depot

The safety of the area in which the bottle depot is located

The waiting time to be served at the bottle depot

The quality of customer service at the bottle depot

The overall appearance of the bottle depot

The cleanliness of the bottle depot

The hours of operation of the bottle depot

The refundable deposit amount you get back is accurate

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

The bottle 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 bottle depot

The safety of the area in which the bottle depot is located

The waiting time to be served at the bottle depot

The quality of customer service at the bottle depot

The overall appearance of the bottle depot

The cleanliness of the bottle depot

The hours of operation of the bottle 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 bottle 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 DELETED

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 bottle depot in or near the town/area where I live

Other (Please specify)

a. NEW

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

Please select one response only

Isolated trip
Series of errands

16.2 DELETED

16A. DELETED

16B. DELETED

16C. DELETED

16D. What would be a reasonable amount of time to wait to be served at a bottle depot?

_____ minutes [ALLOW 0-100]

16E. What would be a reasonable amount of time to get to a bottle depot from your home residence?

_____ minutes [ALLOW 0-500]

16F. How interested would you be in a service where you could drop your beverage containers off at a bottle depot and have the refund deposited into an online account, rather than waiting in line?

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

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 bottle depots every year?

Please enter a number from 0 to 100

[NUMERIC RESPONSE. RANGE: 0 TO 100] %

Don't know

19. In 2019, the overall return rate for beverage containers in Alberta was 85%. 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 curb side 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

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

[IF SUPPLIER ID = 1448 - HIDE Q30, Q31, AND Q32 and skip to the end of the survey (mark as complete)].

[ASK Q.30 IF Q.11='ONCE A YEAR OR LESS' OR 'NEVER']

30. Finally, would you be interested in participating in future research related to the topics in this survey? The additional research would be in the form of a telephone interview for which you would be compensated for your time.

Yes

No

[IF "YES" ASK Q31 and Q32, ELSE SKIP TO CLOSE]

31. Please enter an email address where we can contact you.

[RECORD EMAIL ADDRESS. ENSURE VALID EMAIL FORMAT.]

32. Please enter your first and last name and confirm your telephone number. We will only be using your contact information for a follow-up interview.

FIRST NAME: _____

LAST NAME: _____

TELEPHONE NUMBER: _____

Thank you very much for participating in this survey!