

August 2021

REPORT ON
**BEVERAGE CONTAINER
DEPOT EXIT INTERVIEW SURVEY**

Prepared for the Beverage Container Management Board by PRA Inc.



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METHODOLOGY AND NOTES

- The BCMB reached out to 30 beverage container depots in Alberta who agreed to take part in this study.
- As a result of the pandemic, the survey was fielded online only rather than in person. PRA developed business card handouts with a link to the online survey, each with a unique survey PIN. The cards were distributed to each depot, who then handed them out to customers who made a beverage container return, with a goal of 60 completed surveys from each depot. Survey participants had the option of accepting a \$5 e-gift card upon completion.
- This methodology was pretested at one pilot depot from May 22 to June 6, 2021. The remaining 29 depots conducted the survey from June 21 to August 8, 2021.
- 17 of the 30 depots were able to reach the target of 60 completed surveys. It should be noted that one depot did not complete any surveys. In total, the study resulted in 1,357 completed surveys across all participating depots.
- For a profile of respondents and depot locations, please see Appendix A.

Report notes

- All results in this report are presented out of the total n-size of 1,357 unless otherwise stated.
- Percentages in tables and graphs may not always sum to 100% due to rounding.
- All differences between groups have a p-value of less than .05 unless otherwise stated.

DEPOT PARTICIPATION

Classification	Depot	Municipality	Completed surveys	Classification	Depot	Municipality	Completed surveys
Urban	Advanced Bottle Depot	Fort McMurray	0	Metro	Sage Hill Bottle Depot	Calgary	49
Metro	Bottle Bin Bottle Depot	Edmonton	5	Urban	Sherwood Park Bottle Depot	Sherwood Park	17
Metro	Callingwood Bottle Depot	Edmonton	21	Urban	Spruce Grove Bottle Depot	Spruce Grove	60
Urban	Canmore Bottle Depot	Canmore	9	Urban	St. Albert Bottle Refund Centre	St. Albert	60
Metro	City Centre Bottle Depot	Edmonton	60	Urban	Stony Plain Bottle Depot	Stony Plain	60
Urban	Cosmos I Bottle Depot	Red Deer	41	Metro	Summerside Bottle Depot	Edmonton	32
Urban	Cosmos II Bottle Depot	Red Deer	60	Metro	Sunridge Bottle Depot	Calgary	22
Metro	East Hills Bottle Depot	Calgary	59	Metro	The Bottle Refund Depot	Calgary	60
Metro	Happy Can Bottle Depot	Calgary	24	Metro	The Green Bottle Depot Harvest Hills Ltd.	Edmonton	60
Urban	Leduc Bottle Depot	Leduc	60	Metro	The Green Bottle Depot Windermere	Edmonton	38
Metro	Manning Bottle Depot (Pilot)	Edmonton	60	Metro	Triple H Southside Bottle Depot	Edmonton	60
Metro	Moneyback Container Shack	Calgary	60	Metro	Uptown Depot Ltd.	Calgary	60
Urban	Okotoks Bottle Depot	Okotoks	60	Metro	Vecova Bottle Depot	Calgary	60
Urban	Plus II Bottle Depot	Grande Prairie	60	Metro	West Edmonton Bottle Depot	Edmonton	20
Urban	Recycle Plus I Bottle Depot	Grande Prairie	60	Metro	Winterburn Bottle Depot	Edmonton	60

CUSTOMER EXPERIENCE

TIME SPENT AT DEPOT

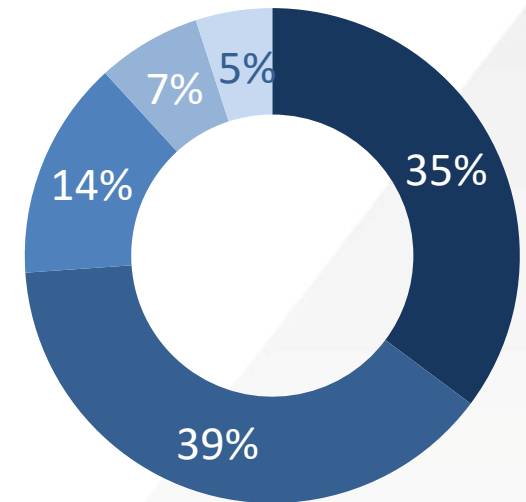
Approximately how long did you spend in the depot (or waiting in the drive-thru) for this visit?

- About three quarters of customers say they spent 10 minutes or less at the depot during their recent visit, including one third who visited for less than five minutes.

Demographic insights:

- Those who visited depots in Calgary or Edmonton were more likely than those at urban locations to say that their visit took less than five minutes.

74%
10 minutes or less



- Less than 5 minutes
- 5 to 10 minutes
- 11 to 15 minutes
- 16 to 20 minutes
- More than 20 minutes

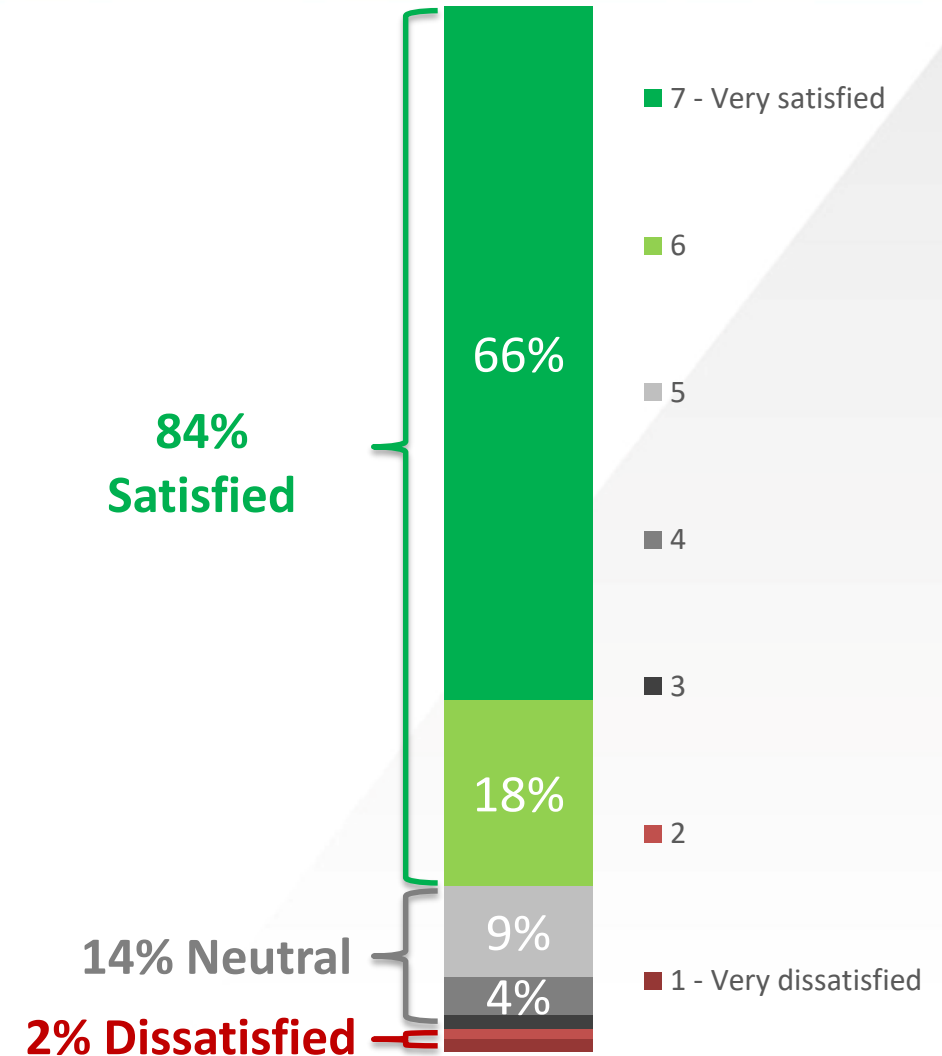
SATISFACTION WITH TIME SPENT AT DEPOT

Using a scale of 1 to 7, where 1 is very dissatisfied and 7 is very satisfied, how satisfied or dissatisfied are you with the amount of time you spent in the depot, from the time you entered the depot to the time you received your refund?

- Generally, depot customers were satisfied with the amount of time they spent at the depot, including two thirds who were very satisfied.
- As would be expected, there is a negative correlation between time spent at the depot and satisfaction with time spent, as 94% of customers who were at the depot less than five minutes were satisfied, compared to just 43% of those who were at the depot for over 20 minutes.

Demographic insights:

- Women and those 45 and older were more likely than men and younger customers to be satisfied with their time spent at the depot.
- Given the correlation between time spent at the depot and satisfaction with time spent, those at metro locations were more likely to be satisfied than those at urban depots.



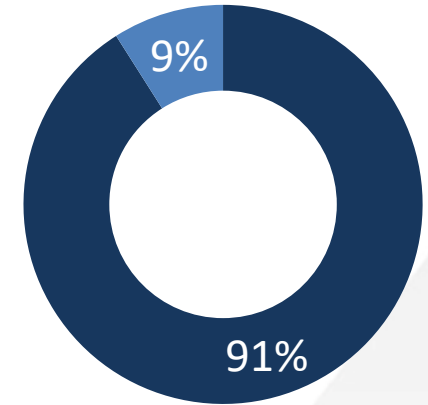
RETURNING AND DESTINATION DEPOT VISITS

Was this your first time visiting this depot location?
Which of the following best describes your visit to this depot?

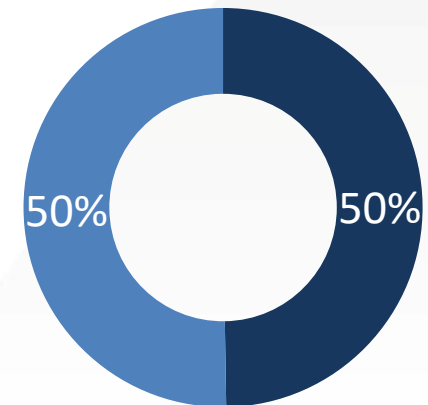
- The vast majority of customers visited a depot that they had been to before.
- There was a nearly even split between those visiting the depot as their primary destination and those visiting as part of a series of errands.

Demographic insights:

- Those under 45 years of age were much more likely than older customers to say that they were visiting a depot location for the first time.



■ Visited this depot before
■ First time visiting this depot



■ Depot was primary destination
■ Visited as part of running series of errands

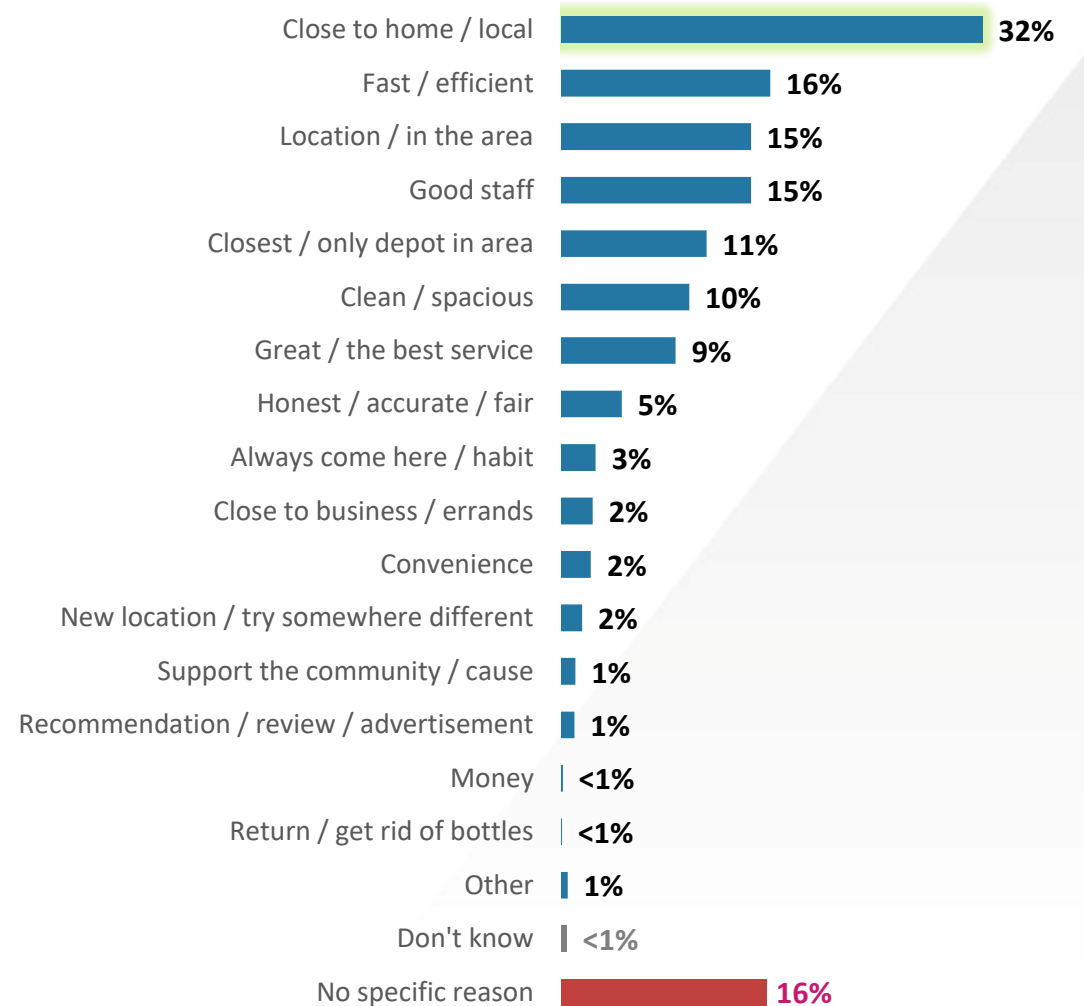
REASON FOR VISIT

Why did you choose to visit this specific depot?

- When asked why customers went to the specific depot they visited, about one third claimed it was because it was *close to home*.
- Other common reasons were because the depot is *fast/efficient*, the *location*, and the *staff*.

Demographic insights:

- Older customers (45+) tended to be more likely to mention aspects around service, such as *fast/efficient*, *good staff*, and *great service*.
- Not surprisingly, those visiting urban depots were more likely than those in Calgary and Edmonton to say that the depot was the *closest/only depot in their area*.



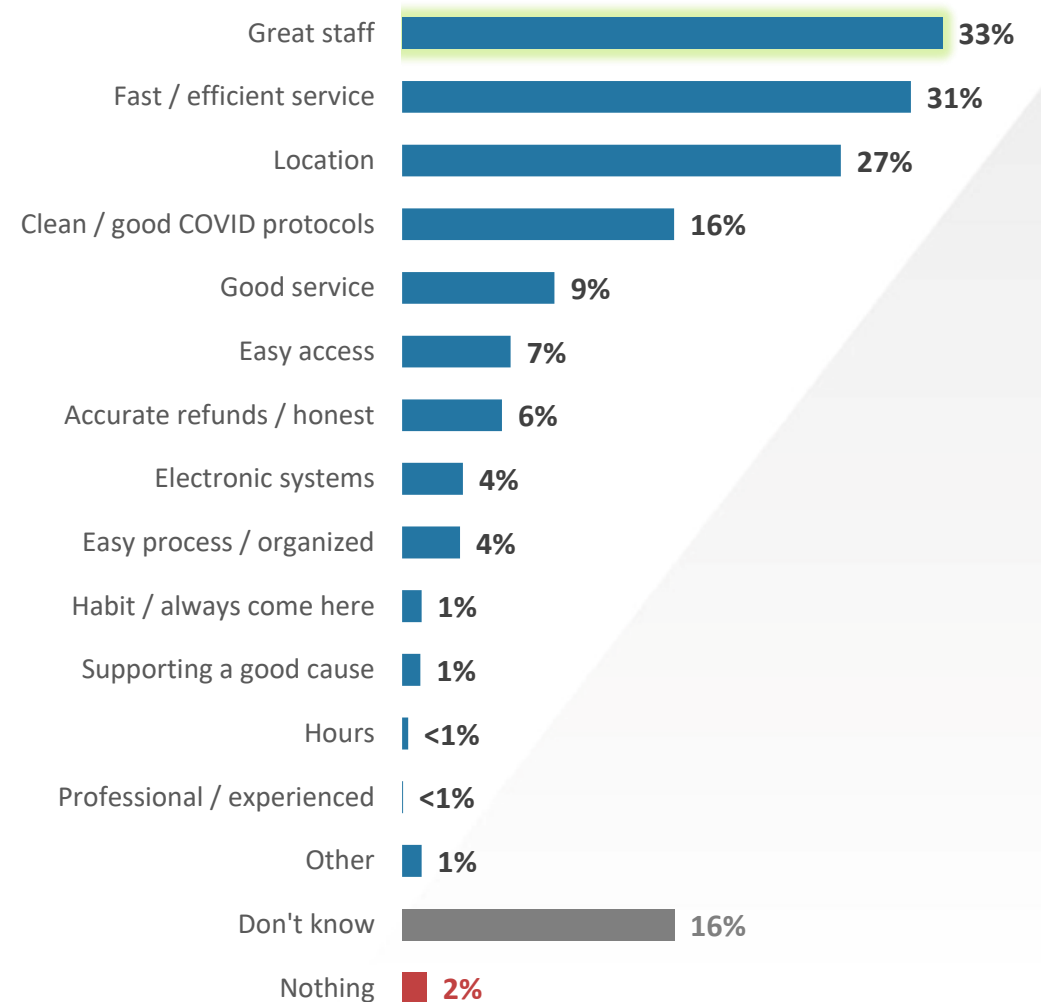
REASON FOR RETURNING

What do you like about this particular depot that would make you likely to return?

- Respondents most commonly mentioned the *staff*, *fast/efficient service*, and *location* as reasons why they are likely to return to the depot they recently visited.

Demographic insights:

- Similar to reasons for visiting, as age increases, so does the likelihood of depot customers mentioning *great staff* or *fast/efficient service* as a reason they would return to the depot they recently visited.



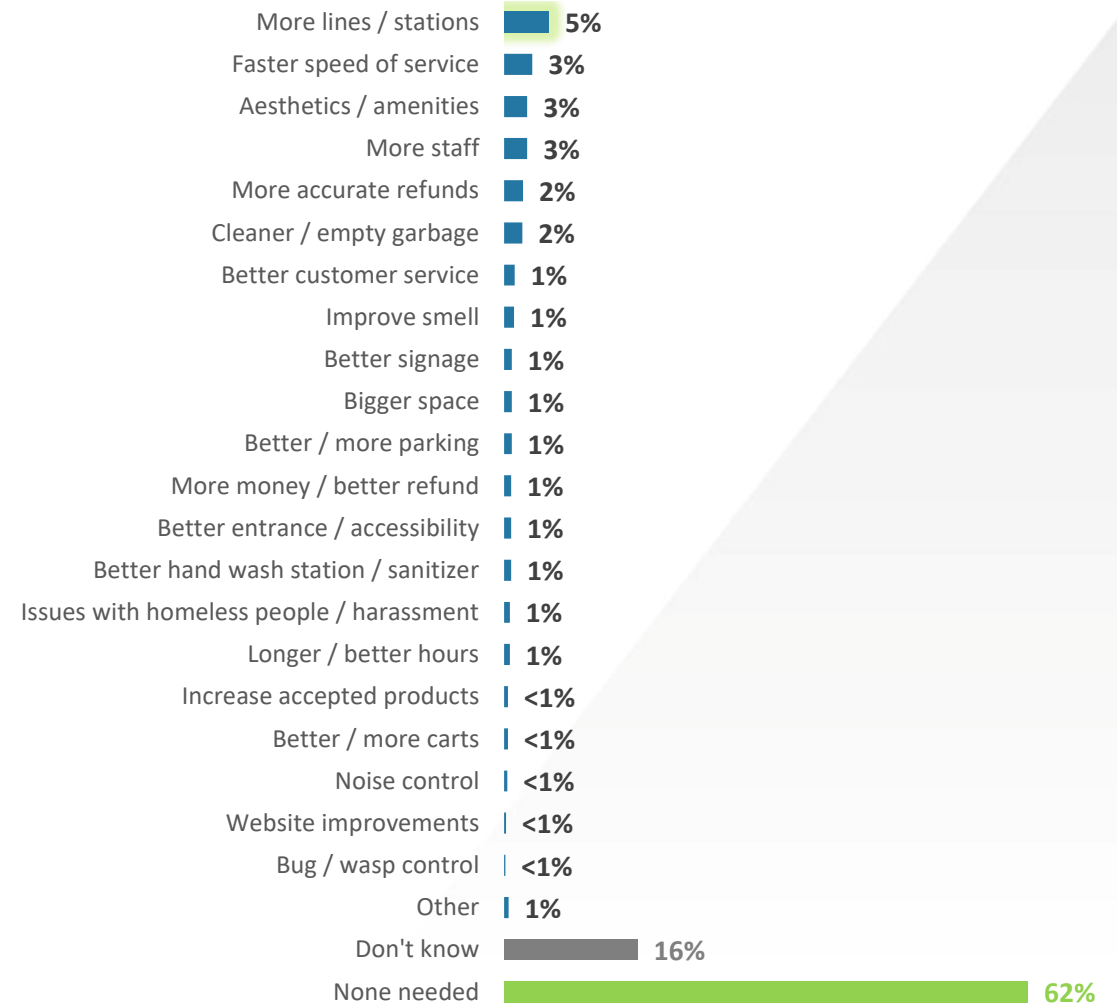
SUGGESTIONS FOR IMPROVEMENT

What, if anything, do you think this depot could do to improve?

- When asked what improvements could be made to their recently visited depot, there was very little consensus among respondents, with the most common suggestion being *more lines/stations* (5% of customers).
- Of note, 78% of customers said that no improvements were needed or that they were unable to suggest any.

Demographic insights:

- Given the results shown previously about time spent in depots, it is not surprising that those at urban location depots were more likely than those in Calgary and Edmonton to focus on those aspects, such as *more lines/stations*, *faster speed of service*, and *more staff*.



RETURN AMOUNT AND ACCURACY

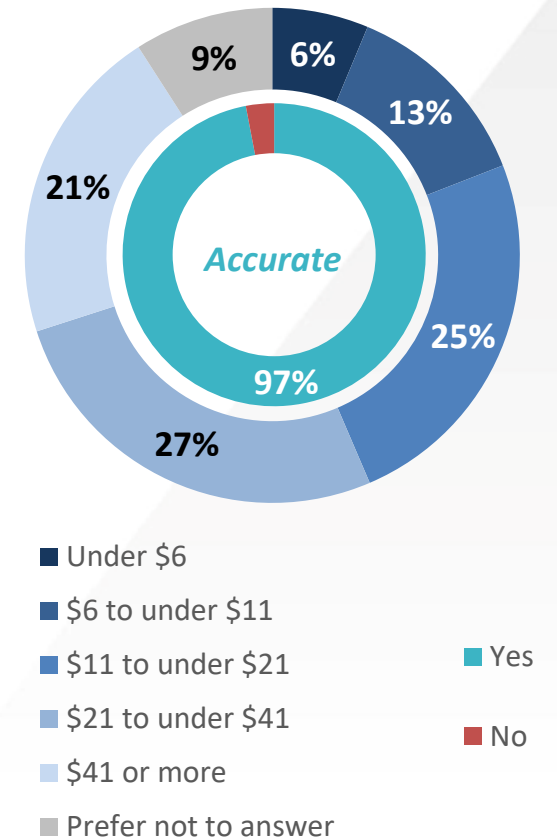
How much did you receive for a refund during this visit?
Do you believe your refund was accurate?

- The majority of depot customers received a refund of at least \$11, with an overall average of about \$32.
- Nearly all depot customers claim that their received refund amount was accurate.
- Although not a statistically significant difference, those receiving a refund amount of at least \$21 were less likely to believe that their refund was accurate.

Demographic insights:

- Those visiting urban depots had a higher average return amount than those at metro depots, likely due to proximity to the depots and metro customers being able to visit more often.
- As age increases, so does the likelihood of customers believing that their refund was accurate.

\$32.27
Average return



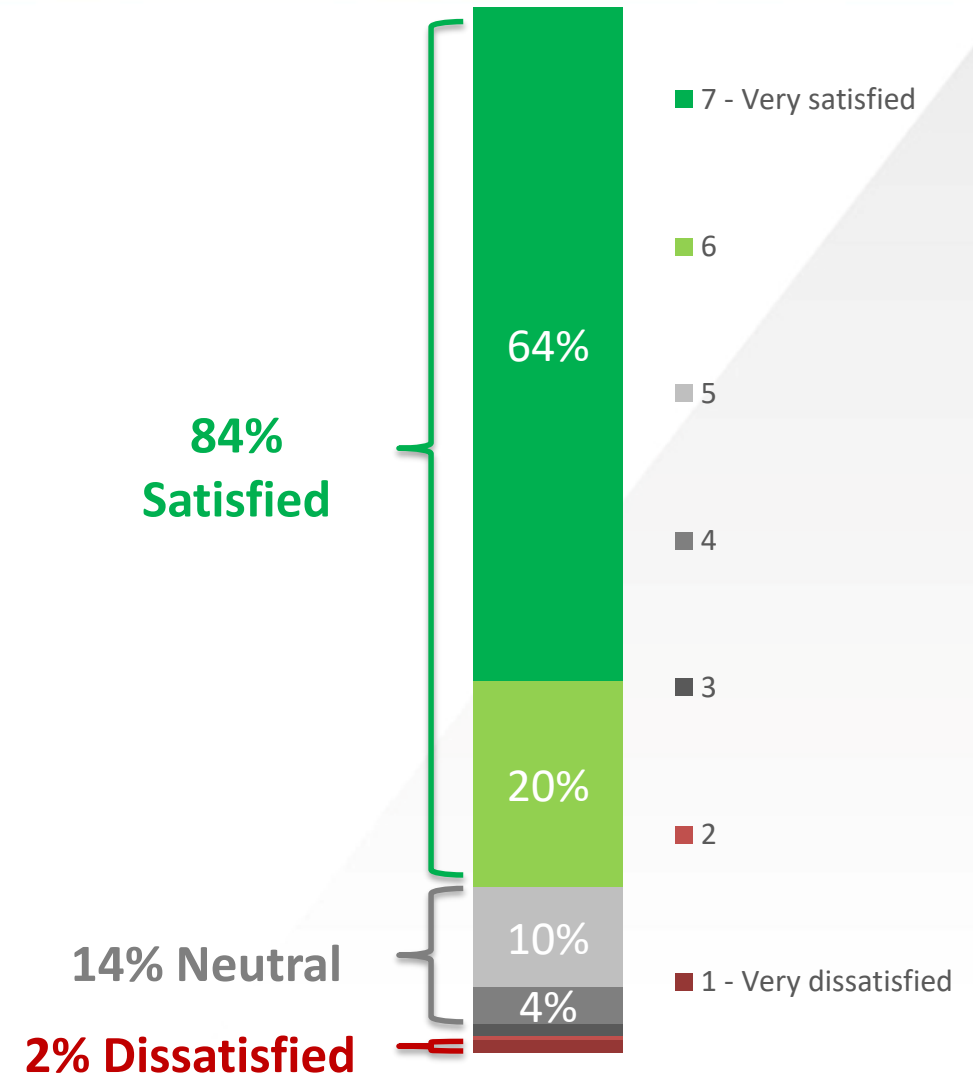
SATISFACTION WITH COVID-19 PROTOCOLS

Using a scale of 1 to 7, where 1 is very dissatisfied and 7 is very satisfied, how satisfied or dissatisfied are you with the COVID-19 safety measures in place at the depot you visited?

- Overall, depot customers were mostly satisfied with the safety measures in place to help prevent the spread of COVID-19.

Demographic insights:

- Women and those visiting depots in Calgary or Edmonton were slightly more likely than men and those at urban depots to say that they were satisfied with the COVID-19 safety measures in place at the depot they recently visited.



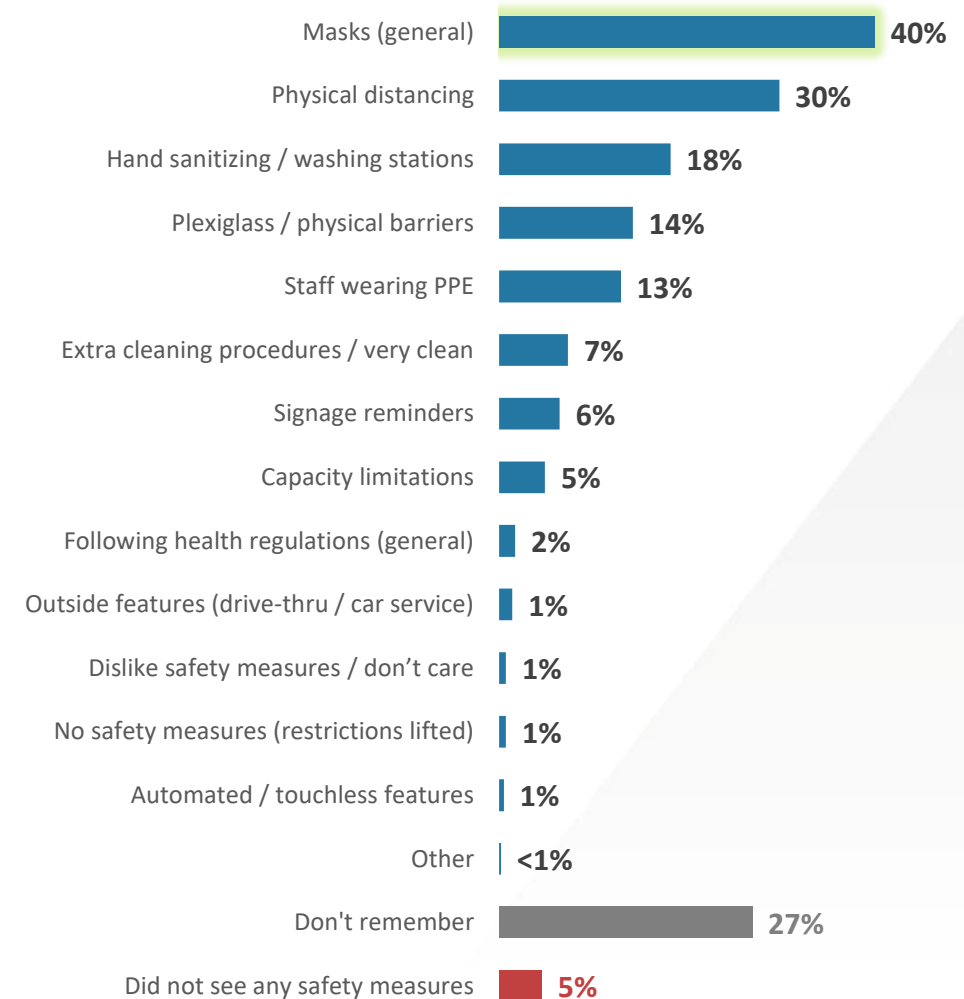
COVID-19 PROTOCOLS IDENTIFIED

What specific safety measures did you see at this depot during your recent visit?

- Although a quarter of respondents did not provide a response, customers commonly mentioned *masks* and *physical distancing* as noticeable health measures during their depot visit.

Demographic insights:

- Generally, older customers were more likely to mention any safety measures.



OVERALL SATISFACTION

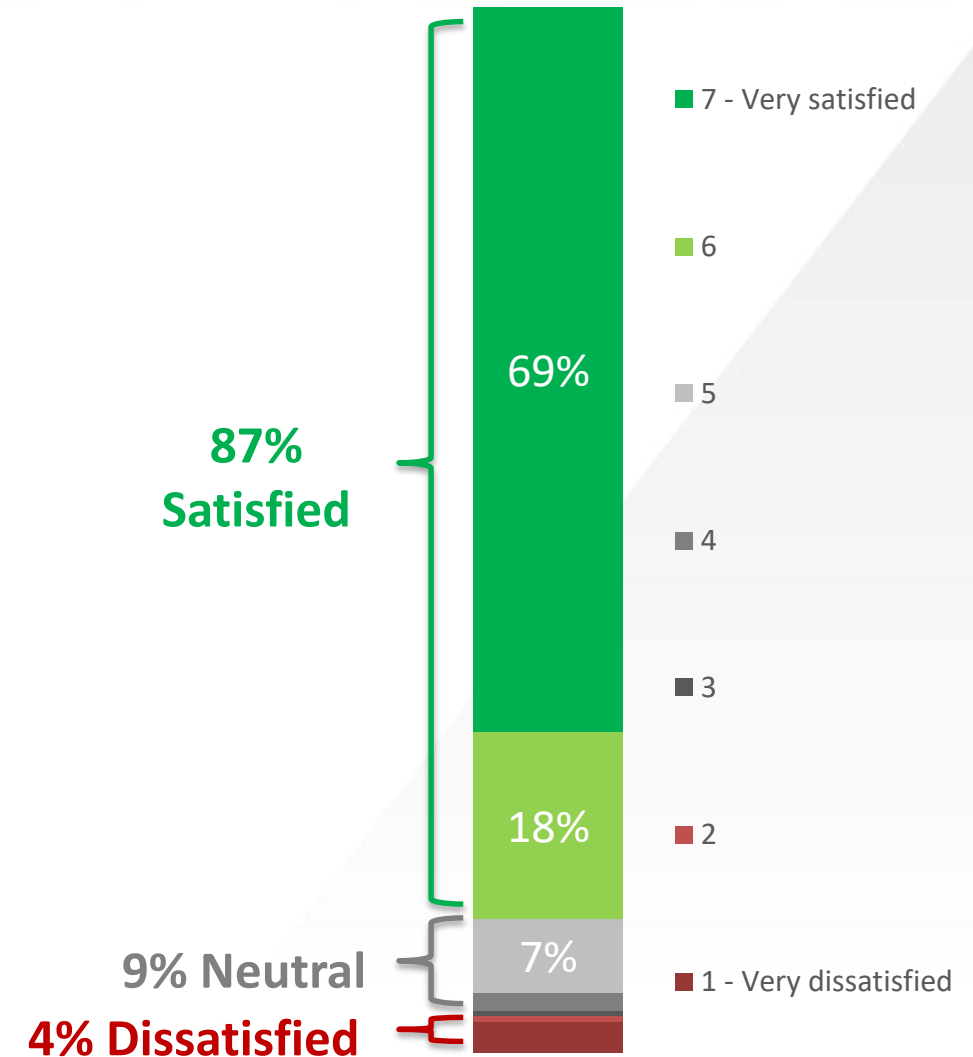
OVERALL SATISFACTION WITH DEPOT

Using a scale of 1 to 7, where 1 is very dissatisfied and 7 is very satisfied, how would you rate your overall experience with the depot you recently visited?

- Overall, depot customers tended to be satisfied with their recent depot visit, with over two thirds of customers saying they were very satisfied.
- Satisfaction with time spent at the depot appears to be highly correlated with overall satisfaction, as 94% of those satisfied with their time spent at the depot were also satisfied with their overall visit. In comparison, 13% of those dissatisfied with their time spent at the depot were still satisfied with their overall visit.
- The same may be said, to a lesser extent, for satisfaction with COVID-19 health measures, as 91% of those satisfied with health measures at the depot were also satisfied with their overall visit, compared to 63% of those dissatisfied.

Demographic insights:

- As age increases, so does the likelihood of customers providing a high rating of overall satisfaction with their recently visited depot.



OTHER DEPOT EXPERIENCES

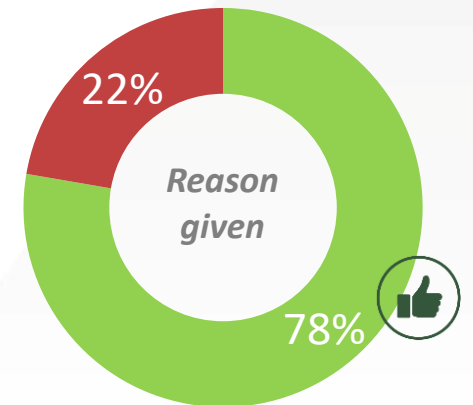
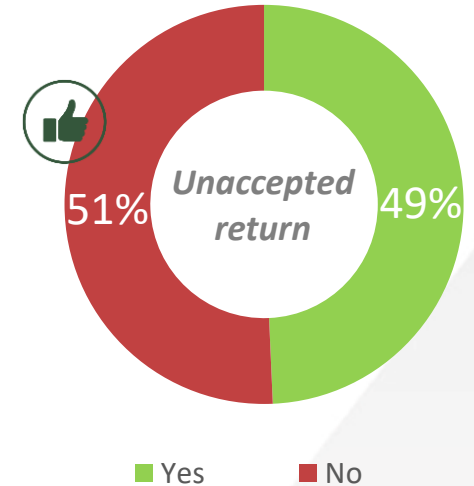
ISSUES WITH RETURNS

Have you ever brought back a container to a depot that the depot worker would not accept?
Did the depot worker explain why they could not accept the container?*

- About half of customers claim to have brought back a container to a depot that would not be accepted.
- Just over three quarters of these respondents say that they were given a reason why the container was not accepted.

Demographic insights:

- Those visiting depots in Edmonton were less likely than those in Calgary or urban locations to say that they have experienced being unable to return a beverage container that they brought back.



FRUSTRATION WITH UNACCEPTED RETURNS

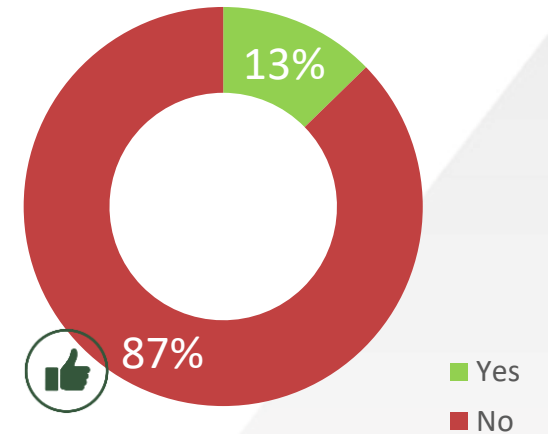
Have you ever been frustrated with a depot for not accepting a container you tried to bring back?*

Can you provide an example of the container that caused the frustration?**

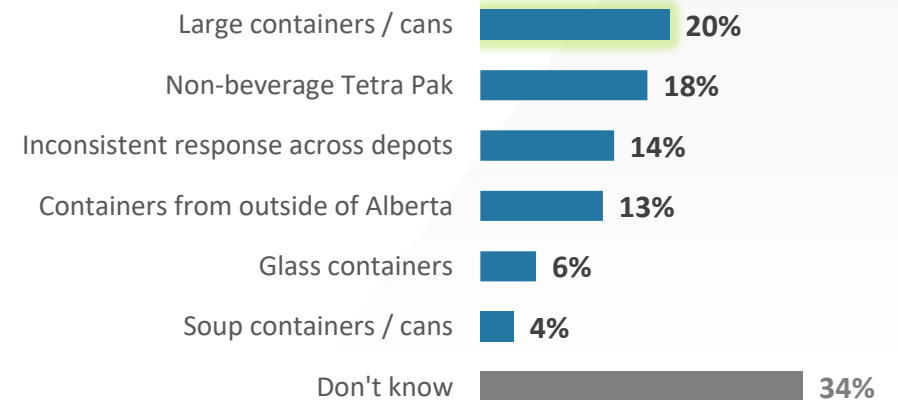
- Only about 1 in 10 respondents say that they have been frustrated with a depot for not accepting a container for return.
- Those frustrated most often mentioned that the containers they tried to return were *large containers/cans* or *non-beverage Tetra Paks*. Also of note, 14% of these respondents claim that there were *inconsistent responses across depots* in terms of what they would or would not accept.

Demographic insights:

- Men were more likely than women to say that they have been frustrated with a depot not accepting a container for return.



Unaccepted containers



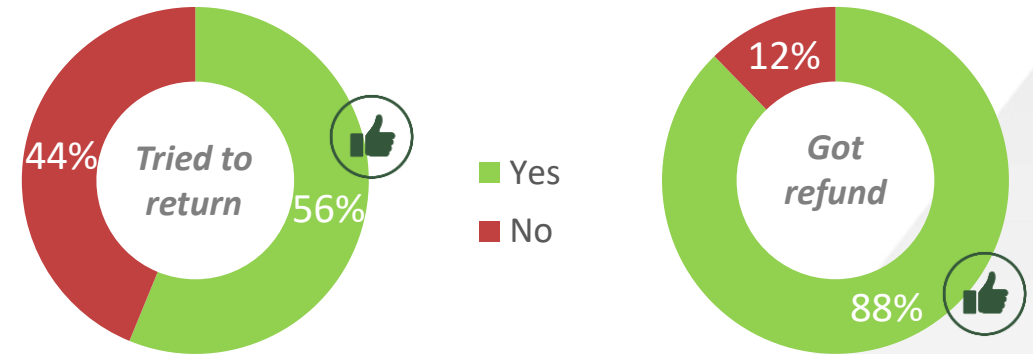
CONTAINERS WITHOUT LABELS

Have you ever tried to return a beverage container to a depot that did not have a label or that was compacted/crushed?
Did you get a refund for that container?*
What did you do with the container? **

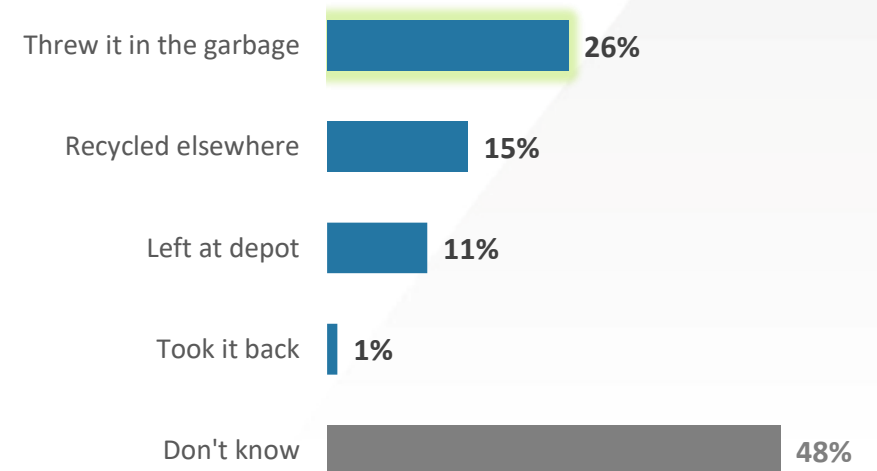
- Just over half of recent depot customers have brought back a container for a refund that either did not have a label or was compacted/crushed.
- The vast majority of these respondents say that the container they brought back was accepted for a refund.
- Of those whose container was not refunded, about half provided a response as to what they did with the container, with the most common response being *threw it in the garbage*.

Demographic insights:

- Men and those aged 45 to 64 were more likely than their counterparts to say that they have tried returning a compacted container or one without a label.



Action taken with non-refunded container

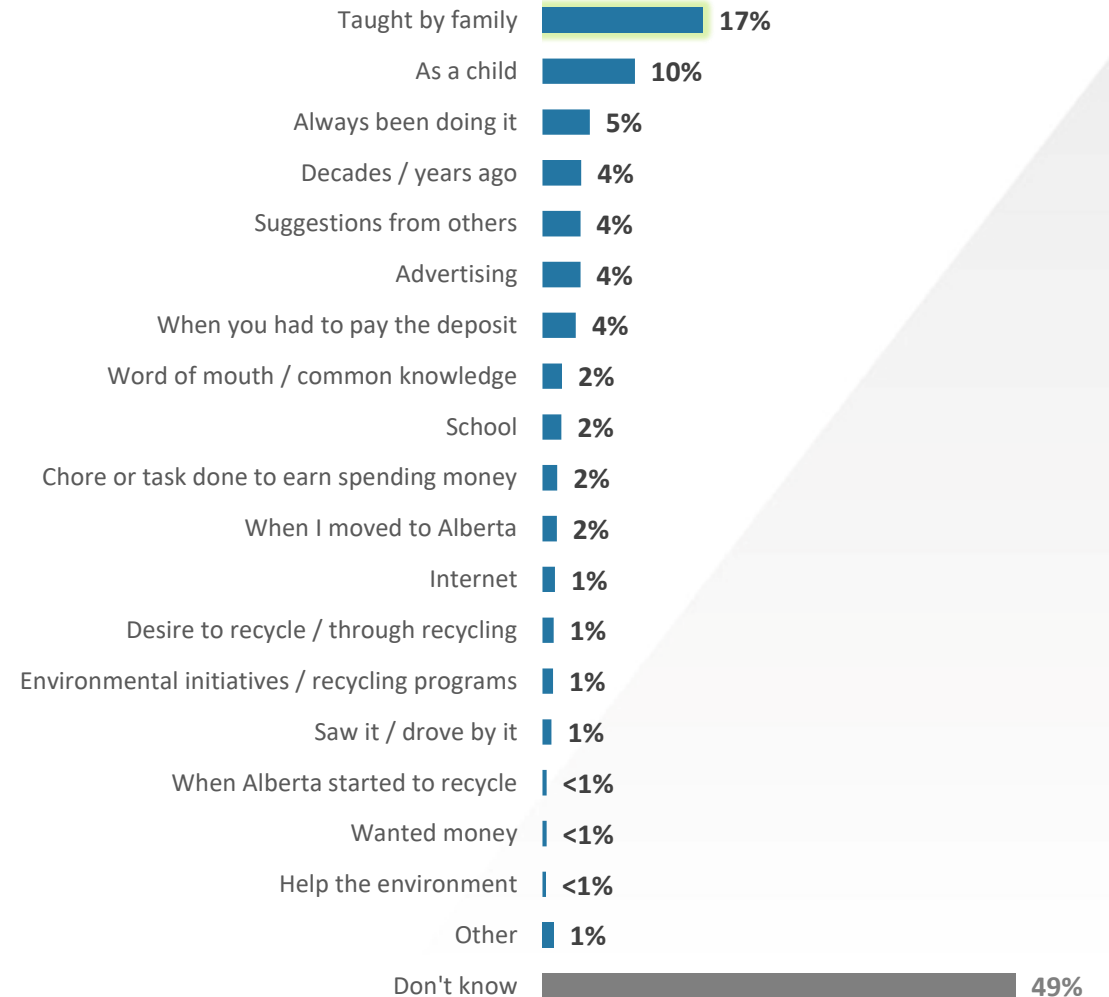


AWARENESS

KNOWLEDGE OF RECYCLING DEPOTS

How did you first learn to take containers back to a depot?

- Only half of depot customers were able to provide a response to how they first learned to take empty containers back to a depot. It appears that most have known to do so for a long time, as the most common answers (*taught by family, as a child, always been doing it*) are of a similar theme.



LOGO AWARENESS

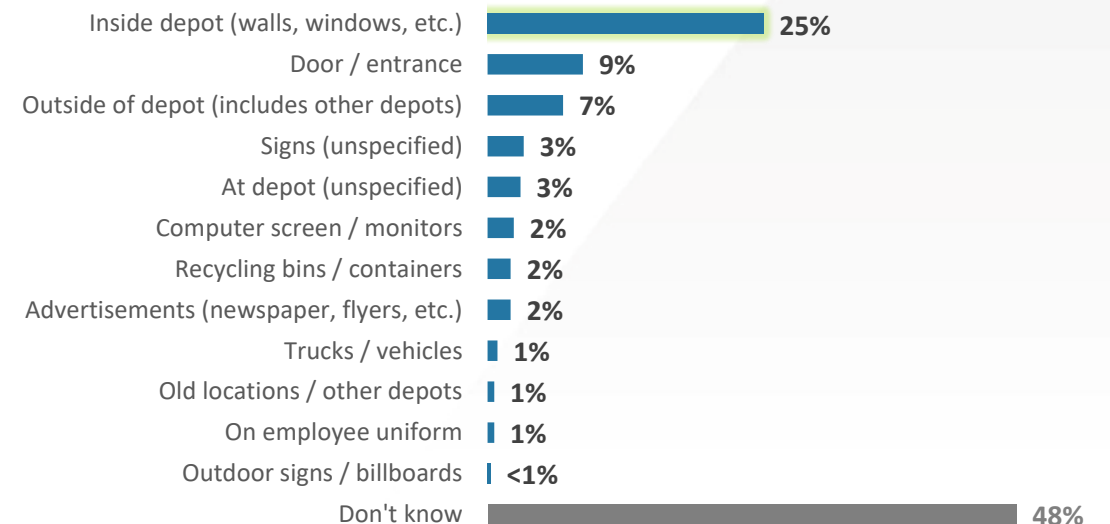
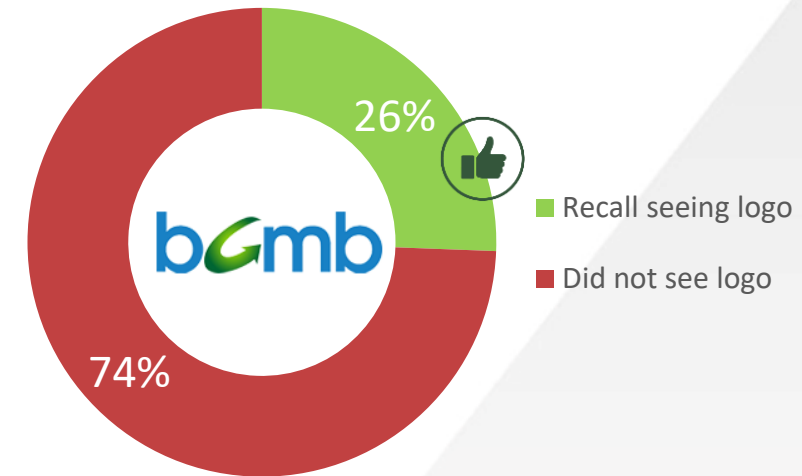
Do you recall seeing this logo during your recent visit to the depot?*

Where do you recall seeing this logo? **

- Overall, about one quarter of customers who recently visited a recycling depot say that they recall seeing the BCMB logo.
- Those who recall seeing the logo most often remember seeing it somewhere *inside the depot (walls, windows, tills, etc.)*.
- About half of those who recall seeing the logo were unsure where they saw it.

Demographic insights:

- As age decreases, so does the likelihood of customers recalling seeing the BCMB logo.
- Additionally, those visiting depots in urban locations were more likely to notice the BCMB logo than those at metro locations.



ALBERTA DEPOT REGULATIONS

Did you know that all depots in Alberta are regulated?

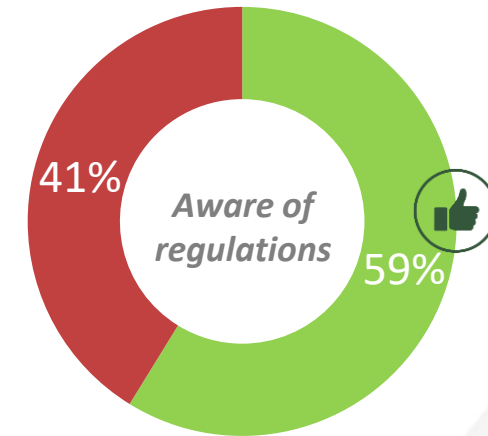
Does it make a difference to you whether depots are regulated or not?

Are you aware that only beverage containers purchased in Alberta are eligible to be returned to an Alberta depot for a refund?

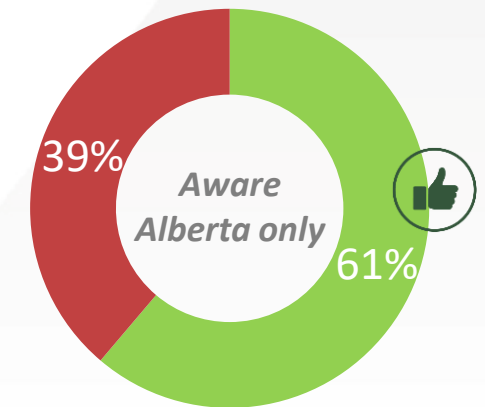
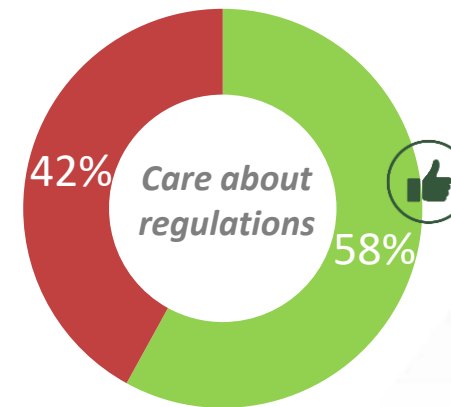
- Over half of recent depot customers claim to be aware that all depots in Alberta are regulated.
- A near identical proportion of respondents say that depots being regulated makes a difference to them.
- Similarly, a near identical proportion say that they are aware that only containers purchased in the province can be returned for a refund at an Alberta depot.

Demographic insights:

- Men are more likely than women to be aware that all depots in Alberta are regulated and to care whether or not they are.
- Additionally, as age increases so does the likelihood of both caring if depots are regulated and knowing that only beverage containers purchased in Alberta are eligible for return.



■ Yes ■ No



AWARENESS OF ELIGIBLE CONTAINERS

Do you find it difficult to differentiate which types of containers are eligible for a refund?

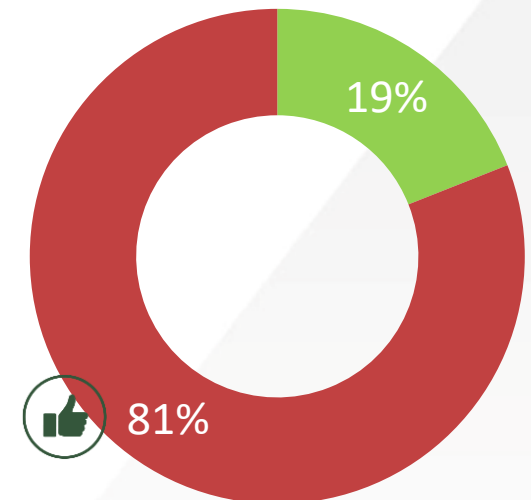
- The majority of respondents say that they do not have difficulties differentiating which types of containers are eligible for a refund.

Demographic insights:

- Typically, the younger the respondent, the more likely it is that they have trouble differentiating between containers eligible for refund.
- Additionally, those who visited a depot in Calgary or Edmonton were more likely to have trouble differentiating between containers.

81%

No issues



■ Yes ■ No

CUSTOMER PREFERENCES AND BEHAVIOURS

FREQUENCY OF DEPOT VISITS

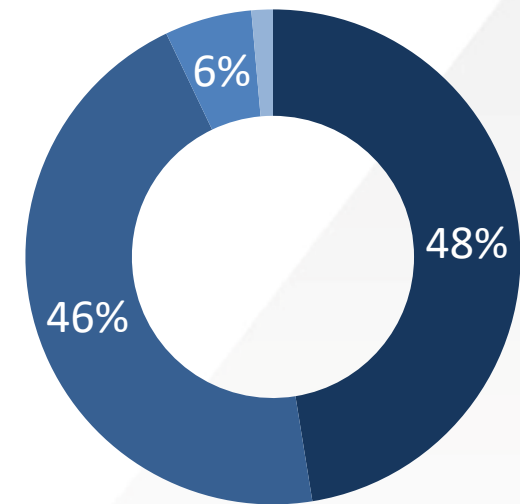
Thinking about a typical year, how often would you say you visit any recycling depot to return beverage containers?

- Nearly half of respondents say that they visit a recycling depot to return beverage containers *at least once per month*, while the majority of the remaining respondents say that they visit *a few times per year*.

Demographic insights:

- Those whose primary residence is a single-family detached house are much less likely than those in other types of dwellings to return beverage containers to a depot *at least once per month*, likely due to having more room for storage.

48%
Visit every month

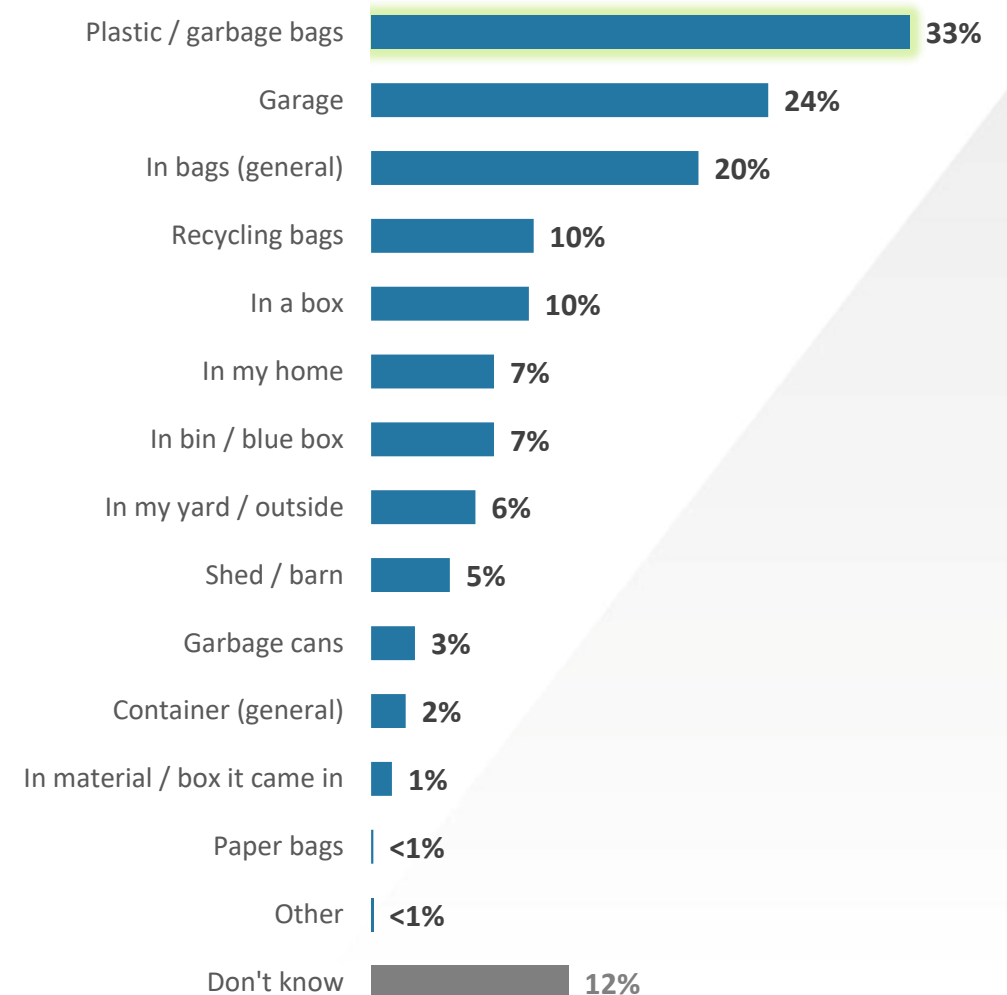


- At least once per month
- A few times per year
- About twice per year
- Once per year or less often

STORING EMPTY BEVERAGE CONTAINERS

How do you typically store your empty beverage containers between visits to a recycling depot?

- When asked how they store empty containers between visits to a recycling depot, respondents provided a mix of storage container types and locations.
- As for methods of storage, respondents most often mentioned *plastic/garbage bags* or *bags in general*. For location, *garage* was the most common answer.



BEVERAGE CONTAINER COLLECTION SERVICE

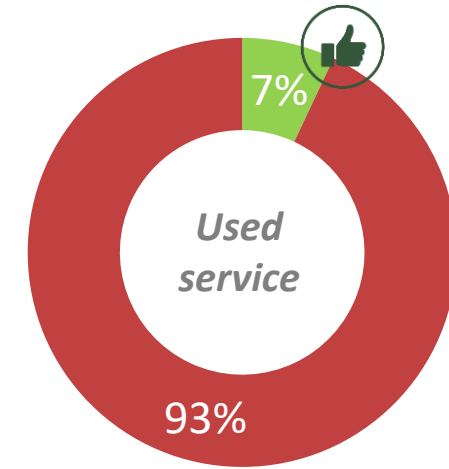
Have you ever used a beverage container collection service rather than returning the containers to a depot yourself?
Was there a service fee associated with the collection?*

Would you use the collection service again, regardless of having to pay a service fee?*

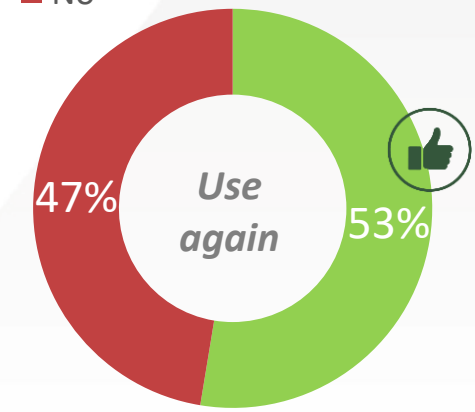
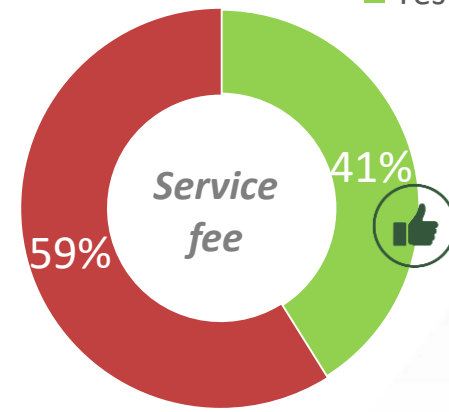
- Only a small proportion of those who recently visited a recycling depot say that they have used a beverage container collection service rather than returning containers to a depot.
- Of those who have used such a service, 41% say that there was a fee associated with the collection, but just over half say that they would use it again regardless of having to pay a fee.

Demographic insights:

- Although not of statistical significance, the likelihood of respondents having previously used a beverage container collection service tends to decrease with age.



■ Yes ■ No



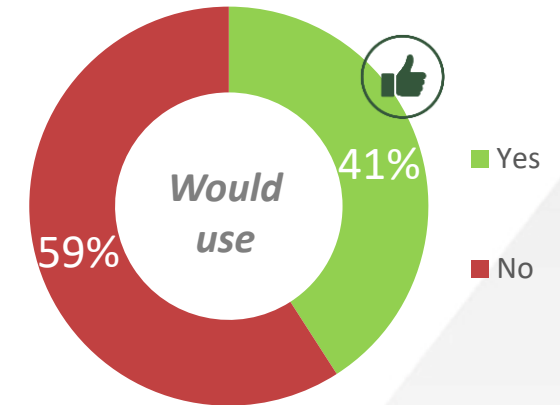
BEVERAGE CONTAINER DROP-OFF SERVICE

If a service was offered where you could drop off your containers without waiting in line and collect your money later, would you use this service?
What would your preferred form of payment be?

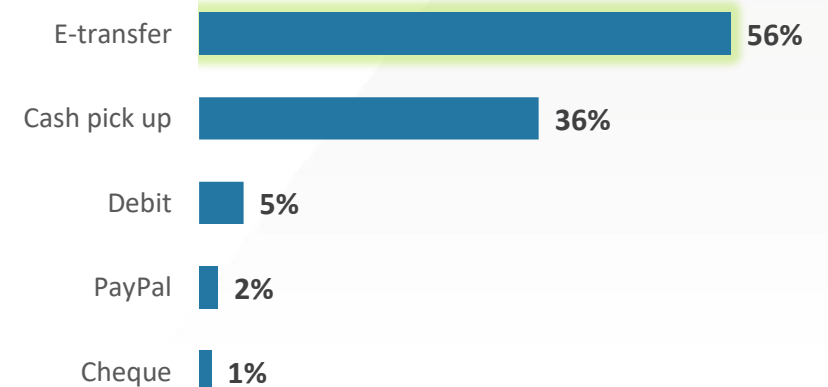
- Over two fifths of recent depot customers say that they would use a service where they could drop off containers immediately and collect money later.
- Over half of those who say that they would use such a service selected *e-transfer* as their preferred form of payment. However, it is important to note that this survey was online only, which may over-represent respondents who are familiar with electronic methods. That said, over one third still prefer *cash pick up*.

Demographic insights:

- Men and respondents under 45 are more likely than women and older respondents to say that they would use a drop-off service.



Preferred payment method



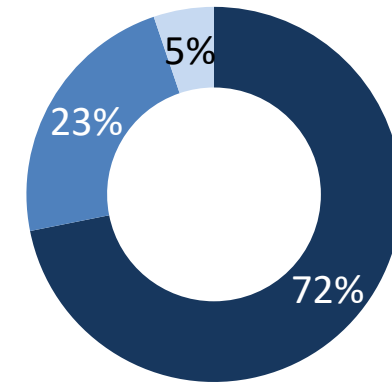
WILLINGNESS TO TRAVEL TO DEPOTS

If you did not have a depot in your local community, or a close neighbouring community, what would you do with your beverage containers?
How far would you be willing to travel to return your beverage containers to a depot?

- Nearly three quarters of respondents say that they would be willing to *travel to the nearest depot* to return beverage containers if there were no recycling depots near them.
- Over half of respondents would be willing to travel up to 20 km to a depot, while about 15% say that they would be willing to travel further.

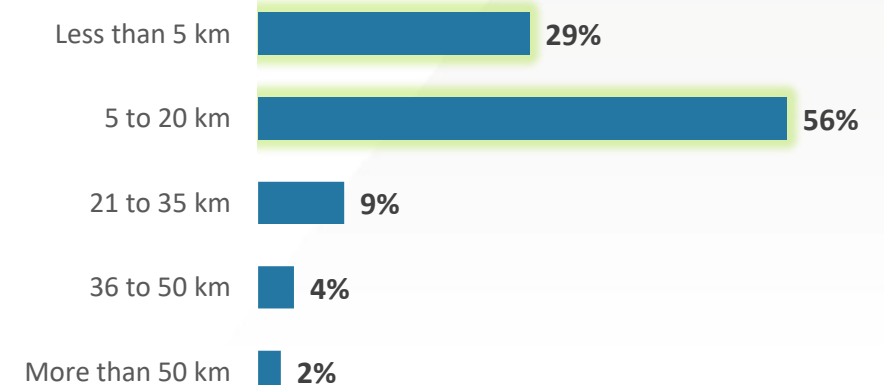
Demographic insights:

- Those who visited depot locations in Calgary or Edmonton are more likely than those who visited urban depot locations to say that they would *travel to the nearest depot* if there was not one near them.
- However, those who visited urban locations are typically willing to travel further to a depot (more than 20 km) than those who visited in Calgary or Edmonton.



- Travel to the nearest depot
- Recycle the beverage containers using my local blue box program
- Throw the beverage containers in the trash

Distance willing to travel



PREFERENCE FOR EXPANDED ELIGIBILITY

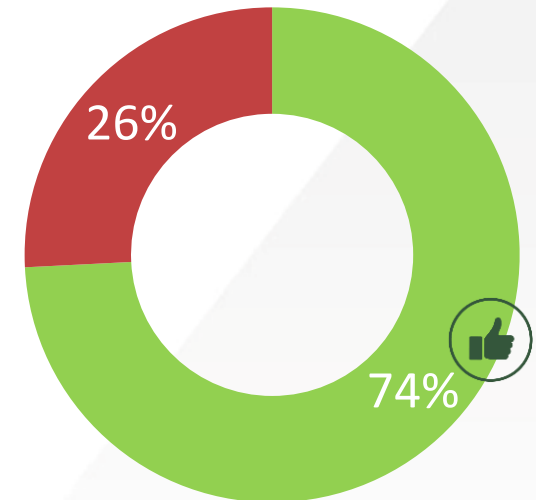
Would you like to see a deposit placed on more types of containers so that you can bring them back to a depot to be recycled?

- About three quarters of recent depot customers are in favour of placing a deposit on more types of containers so that they can be recycled at a depot.

Demographic insights:

- Depot customers between 18 to 44 years of age are most likely to be in favour of placing deposits on more types of containers.

74%
In favour



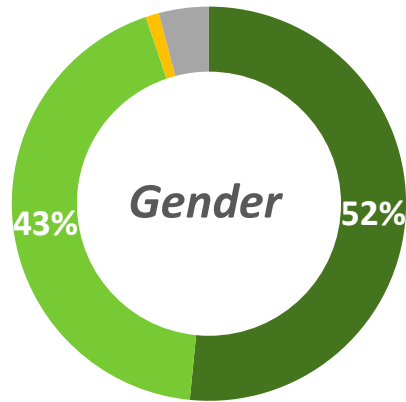
■ Yes ■ No

APPENDIX A



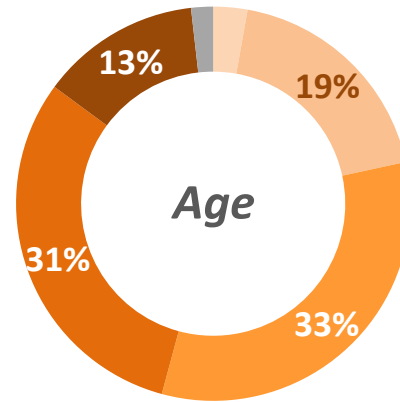
DEMOGRAPHIC PROFILE OF CUSTOMERS

52% Male



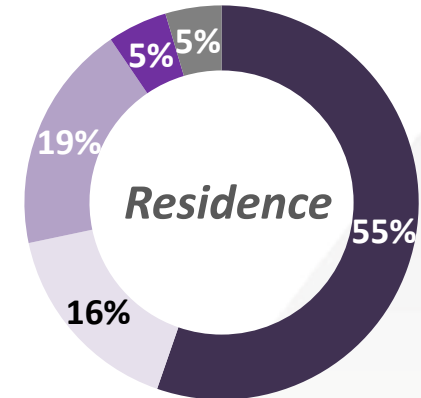
- Male
- Female
- Other
- No response

64% 30 to 64



- 13 to 17
- 18 to 29
- 30 to 44
- 45 to 64
- 65 and older
- No response

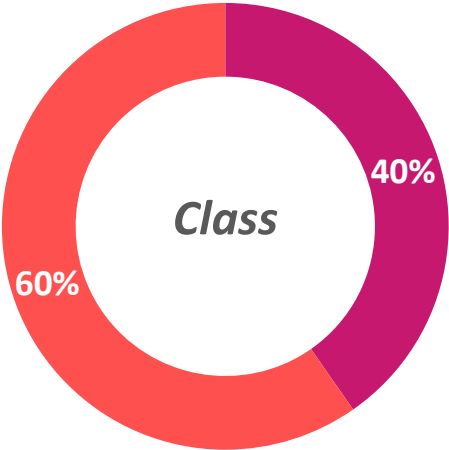
55% Single-family home



- Single-family detached house
- Multi-family home
- Apartment or condo
- Other
- No response

PROFILE OF DEPOT LOCATIONS

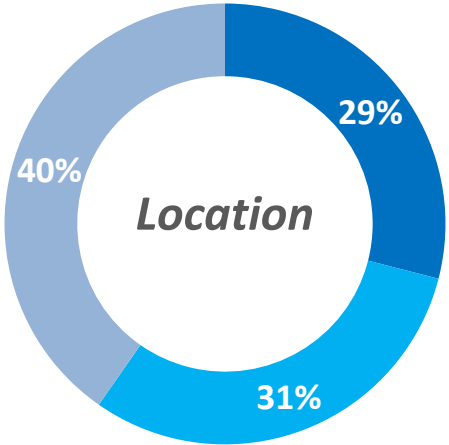
60% Metro



■ Urban

■ Metro

40% Urban



■ Calgary

■ Edmonton

■ Other