

August 2024

REPORT ON

2024 BEVERAGE CONTAINER DEPOT EXIT INTERVIEW SURVEY

Prepared for the Beverage Container Management Board by PRA Inc.



Contact:

Derek Berg, Senior Marketing Research Manager

berg@pra.ca

204-594-2086

METHODOLOGY

- The BCMB reached out to 30 beverage container depots in Alberta who agreed to take part in this study. Depots invited to participate in the 2024 study were those in and around the Calgary area (within about 150 km).
- In 2021 and 2022, as a result of the pandemic, the survey had been fielded online only rather than in person. Business cards, each with a unique link to the online survey, were distributed to depots and handed out to customers by depot staff. Survey participants had the option of accepting a \$5 e-gift card upon completion. This methodology was repeated for the 2023 study, however, where some depots were unable to achieve their online survey target of 60 completions, PRA interviewers visited in person to supplement the online survey via self-completed surveys by customers on electronic tablets.
- For the 2024 study, the methodology returned to a fully in-person intercept approach, where PRA interviewers were stationed at participating depots for one day each. Interviewers offered depot customers the opportunity to self-complete the survey by a provided electronic tablet and respondents were offered a \$10 e-gift card for participating.
- The survey ran from May 25 to August 3, 2024. The target of 60 completed surveys was reached at only 3 of the 30 depots, however, at least 30 completed surveys were achieved at 19 depots. In total, the study resulted in 1,123 completed surveys across all participating depots.
- For a profile of 2024 respondents and depot locations, please see Appendix A.

REPORTING NOTES

- All results in this report are presented out of the total n-size (2024, n=1,123; 2023, n=1,456; 2022, n=1,292; 2021, n=1,357) unless otherwise stated.
- Comparisons to 2021, 2022 and 2023 are provided where possible, however, it should be noted that previous years were conducted using an entirely or primarily online methodology versus an entirely in person method in 2024. Furthermore, 2023 depots were based in and around Edmonton, while 2021 and 2022 were located across the province. For these reasons, year-to-year comparisons should be analyzed with caution.
- Percentages in tables and graphs may not always sum to 100% due to rounding.
- In some charts, values of 2% or less are not shown in order to increase readability.
- All differences between groups have a p-value of less than .01 unless otherwise stated.

CUSTOMER EXPERIENCE

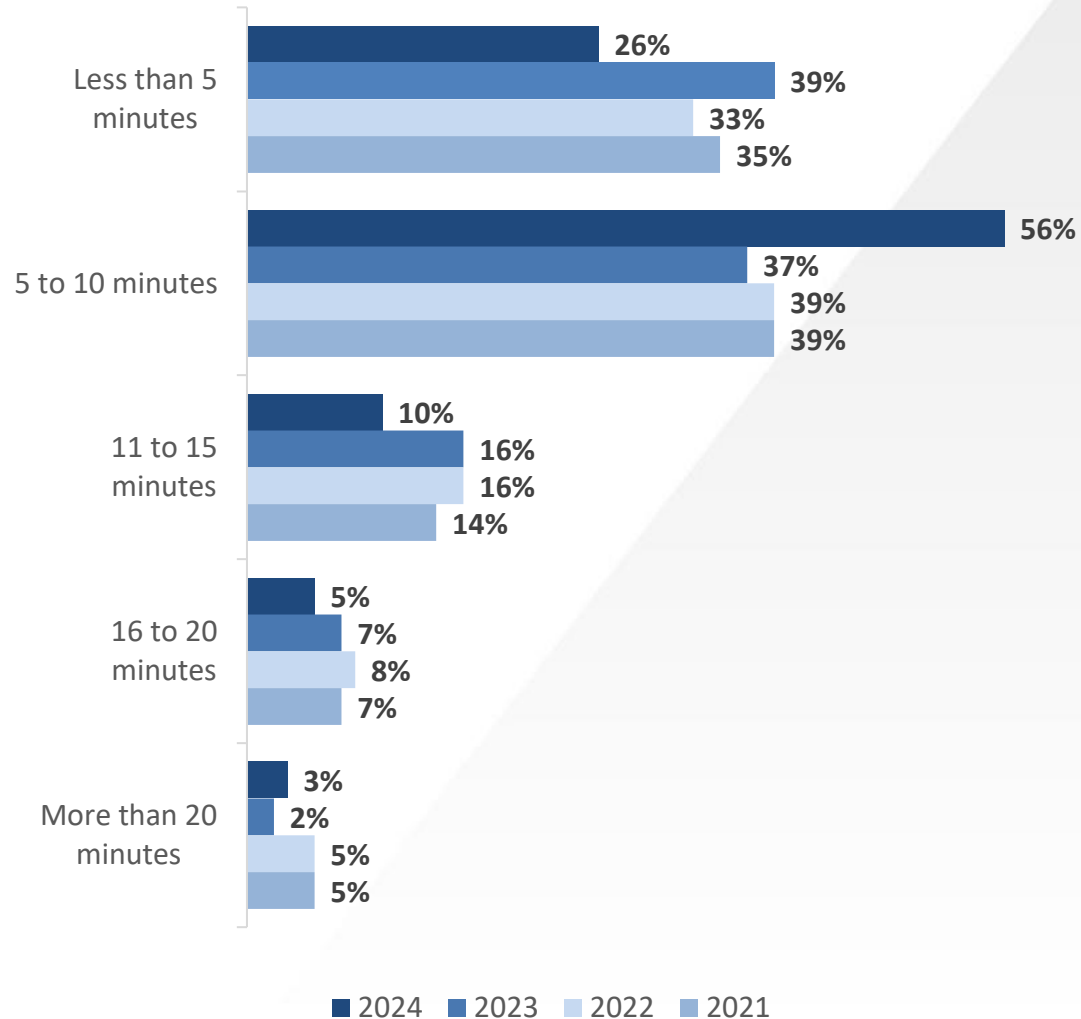
TIME SPENT AT DEPOT

Q4. Approximately how long did you spend in the depot (or waiting in the drive-thru) for this visit?

- Over 4 in 5 customers say they spent 10 minutes or less at the depot during their recent visit, including 26% who visited for less than five minutes. The proportion visiting for less than five minutes is down from 39% last year, while the proportion visiting for 5 to 10 minutes increased from 37% to 56%.
- In 2024, the average time spent at a depot was 8 minutes.

Demographic insights:

- Those who visited depots in rural areas were more likely than those at urban or metro locations to say that their visit took more than 10 minutes.



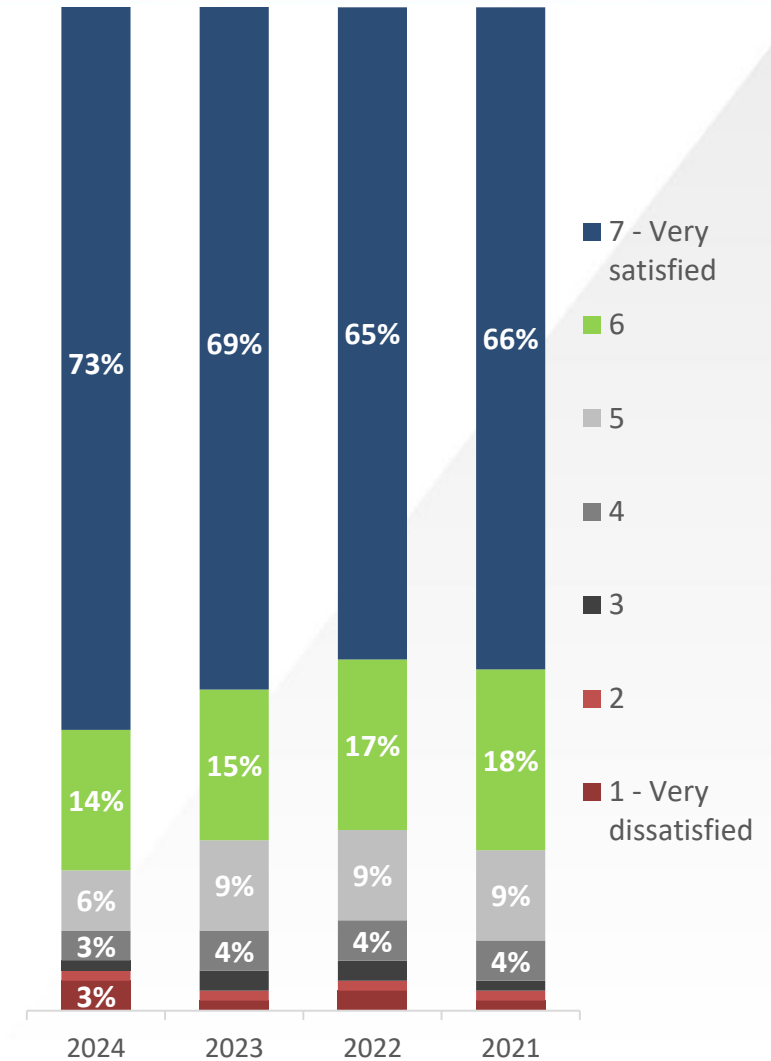
SATISFACTION WITH TIME SPENT AT DEPOT

Q3. 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 nearly three quarters who were very satisfied. These results are similar to previous years, with an increase in those who are very satisfied.
- As would be expected, there continues to be a negative correlation between time spent at the depot and satisfaction with time spent in 2024, as satisfaction drops from 92% of customers who were at the depot less than five minutes to 59% of those who were at the depot for over 15 minutes.
- Among those who were at the depot for 10 minutes or less, 91% say they were satisfied with the total time spent at the depot.

Demographic insights:

- There were no statistical differences by groups.



RECEIVING PAYMENT

Q5. Did you receive a refund payment for your returned beverage containers today?

Q6. Were you told when to expect your payment?*

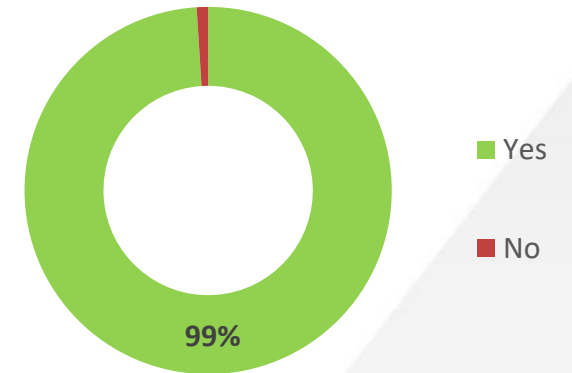
Q7. What type of payment did you / do you expect to receive?

- Virtually all depot customers reported receiving their payment on the day they made returns, with only 7 total customers reporting otherwise.
- Only one of these 7 customers say they were told when to expect payment when returning their containers.
- The majority of customers received cash payments, while just over one third received ATM tickets and six received payment by e-transfer. Two customers did not expect to receive payment.

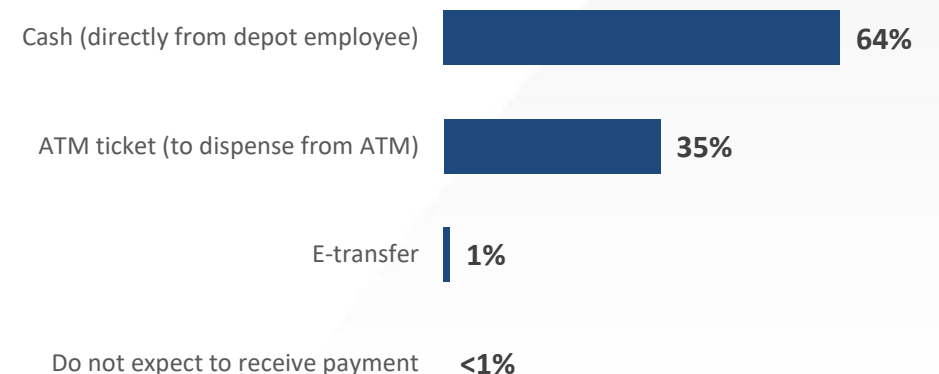
Demographic insights:

- Customers who visited depots in rural areas were much more likely than those who visited urban or metro depots to receive cash payments.

Received payment same day



Type of payment



RETURN AMOUNT AND ACCURACY

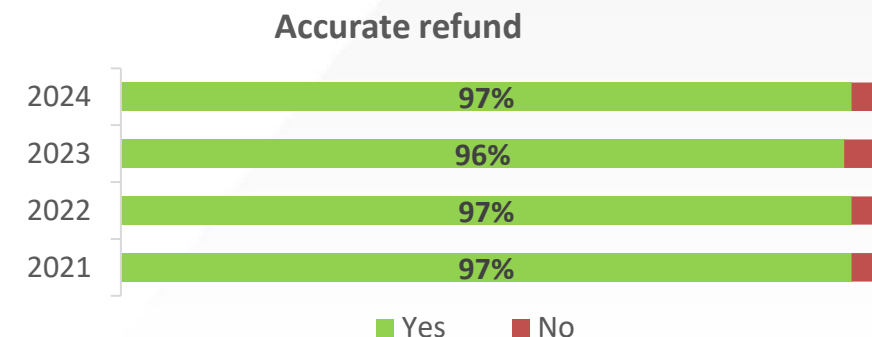
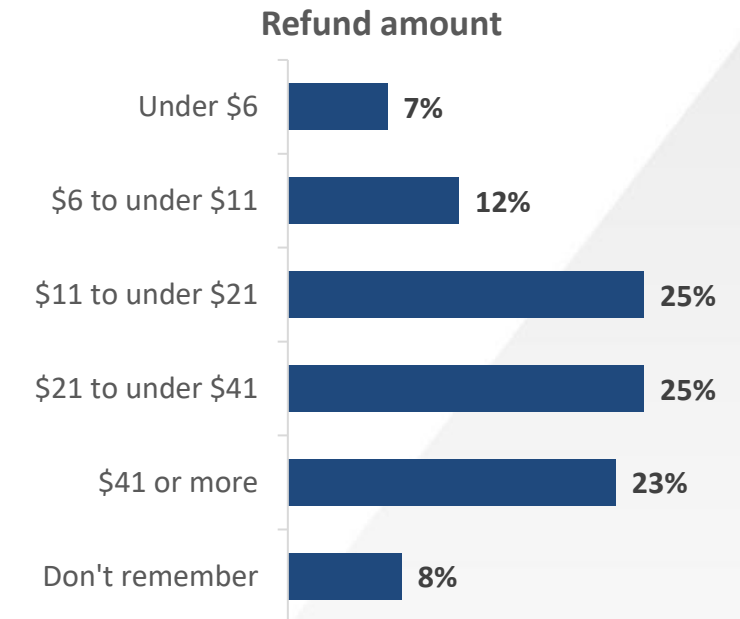
Q8. How much did you receive for a refund during this visit?*

Q9. Do you believe your refund was accurate?*

- The majority of depot customers received a refund somewhere between \$11 and \$41, with nearly one-quarter receiving a refund of \$41 or more.
- Similar to previous years, nearly all depot customers claim that their received refund amount was accurate. In 2024, 22 respondents (2%) claimed their refund was less than it should have been, while six (1%) believe they received too much.
- The reported average refund amount in 2024 was \$33.34.

Demographic insights:

- Generally, customers 65 and older received a smaller refund as compared to those under 65.
- Customers who visited depots in rural areas received a higher refund than those who visited urban or metro depots.



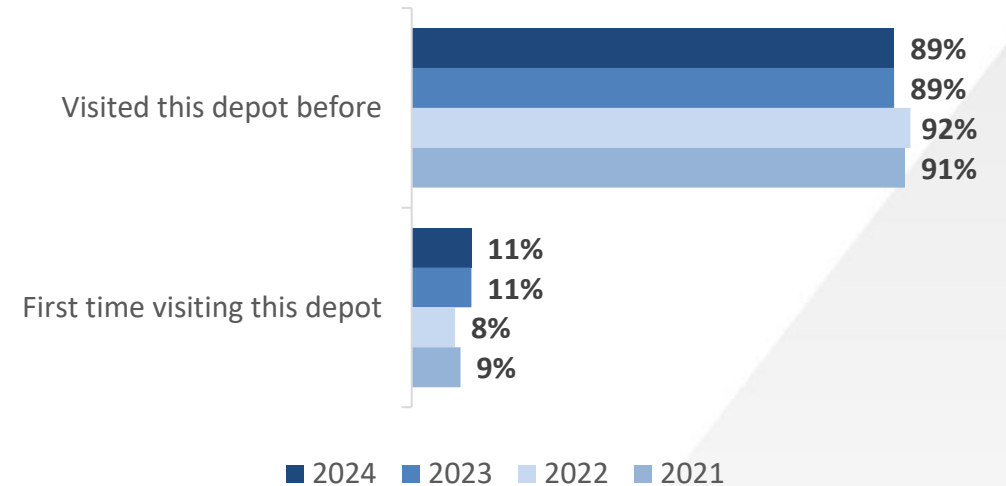
RETURNING AND DESTINATION DEPOT VISITS

Q10. Was this your first time visiting this depot location?

- Similar to results from previous years, the majority of customers visited a depot that they had been to before.

Demographic insights:

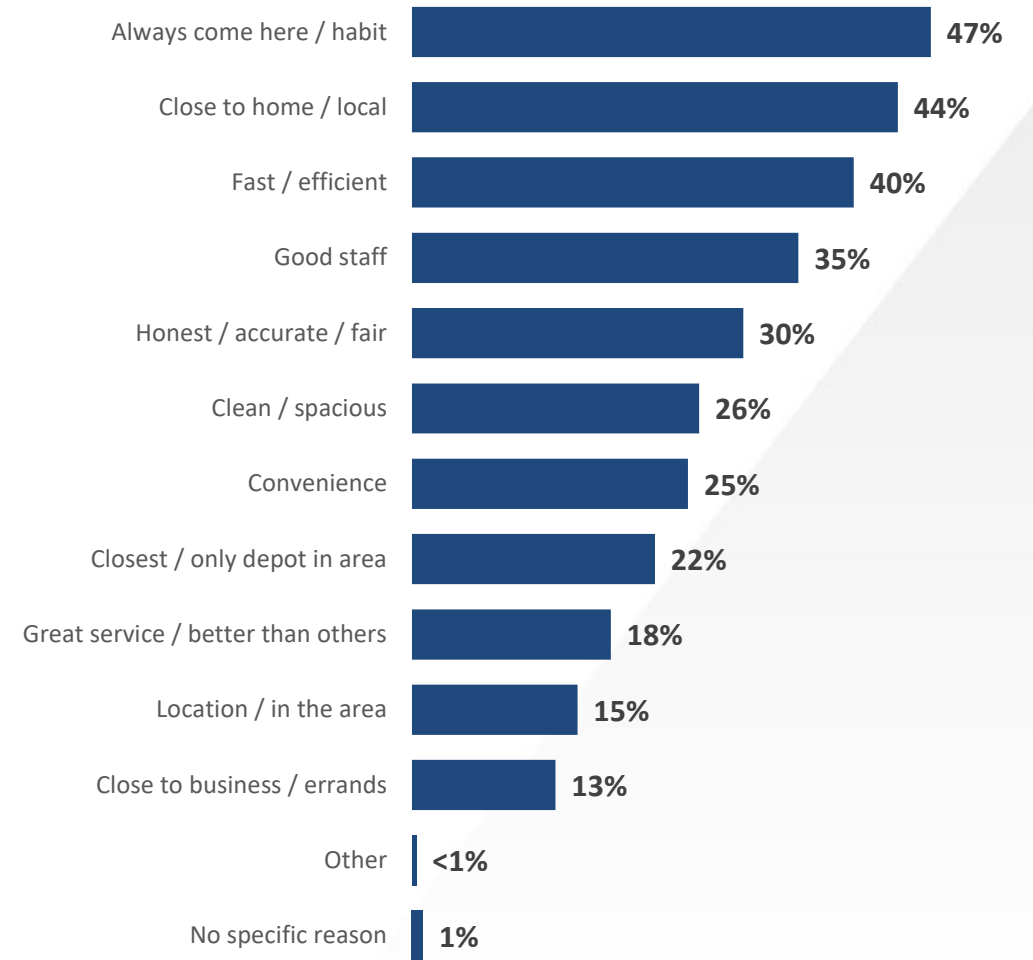
- Not surprisingly, as age increases, the likelihood of a customer visiting a depot for the first time decreases.



REASON FOR VISIT

Q11. Why did you choose to visit this specific depot?

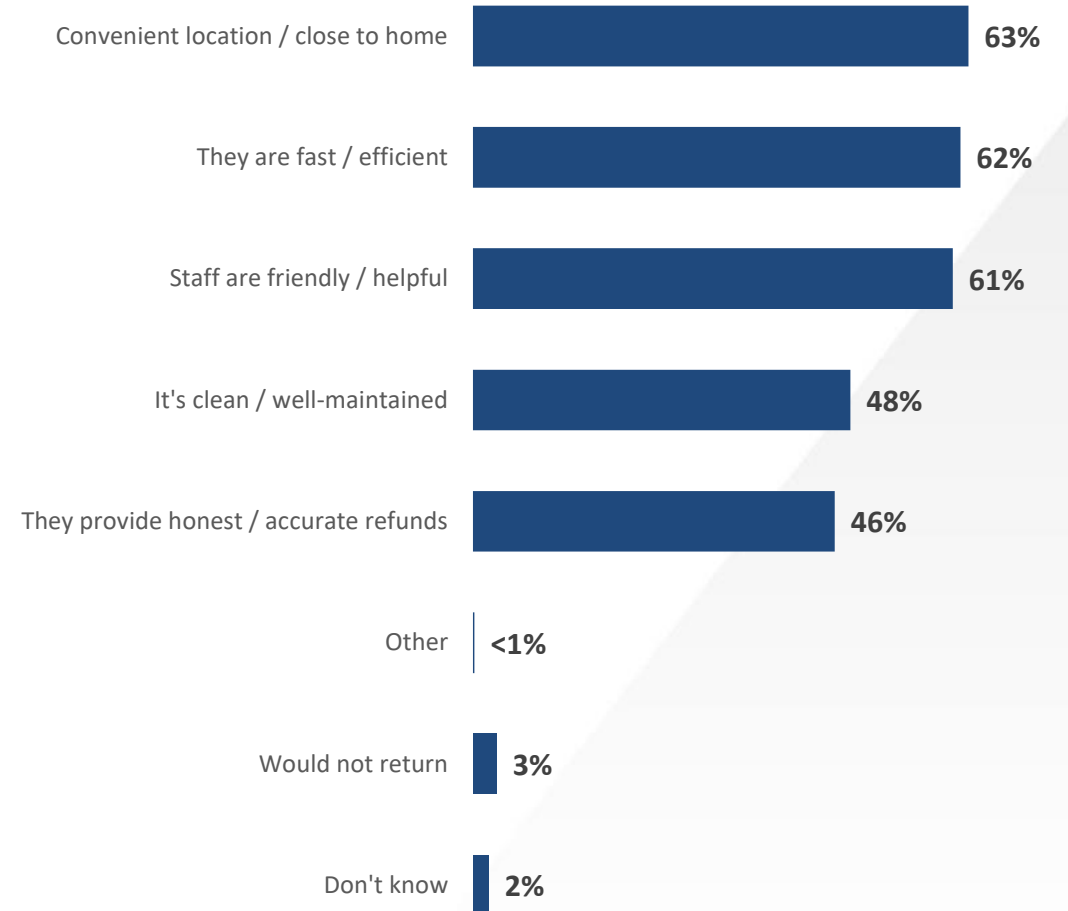
- When asked why customers went to the specific depot they visited, about half said it was because *they always come here* or because it was *close to home*.
- Other common reasons were because the depot is *fast/efficient* or because they have *good staff*.



REASON FOR RETURNING

Q12. What do you like about this particular depot that would make you likely to return?

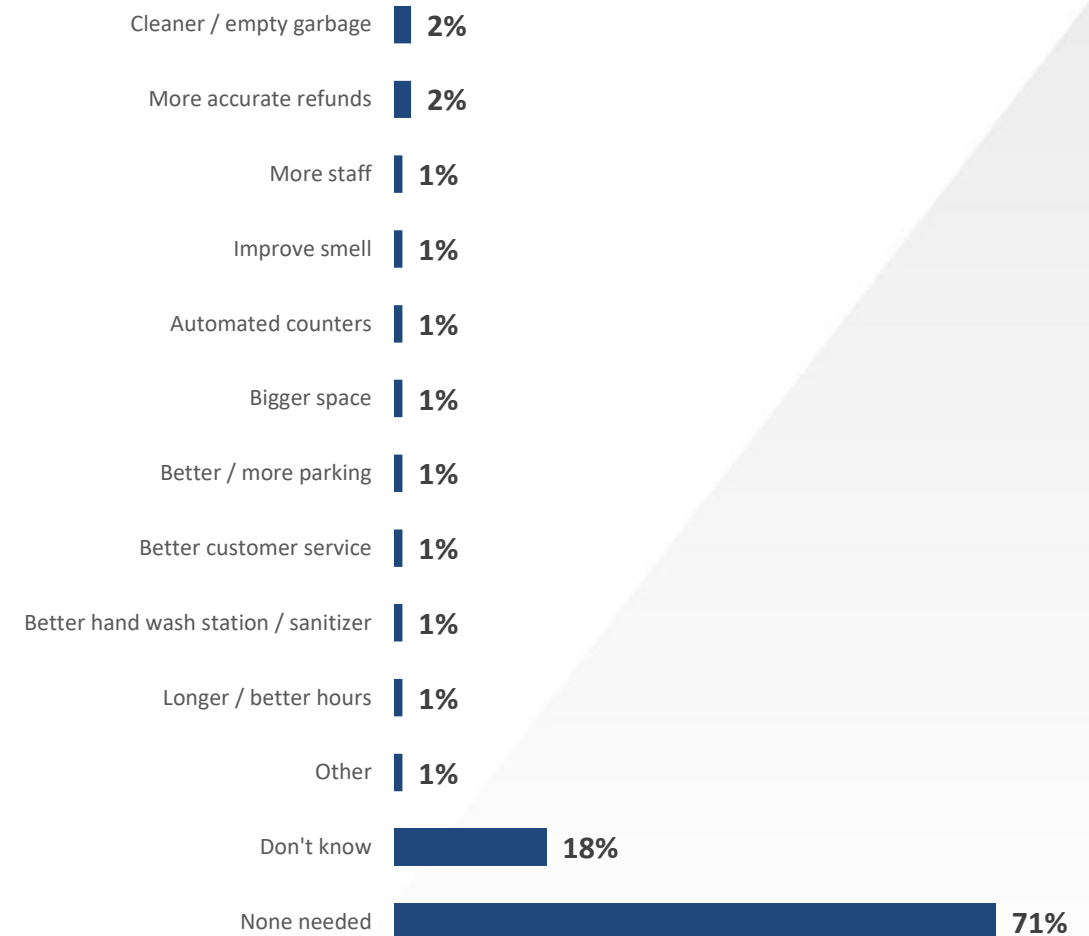
- Respondents most commonly said the *convenient location, fast/efficient service, and the staff are friendly/helpful* as reasons why they are likely to return to the depot they recently visited.



SUGGESTIONS FOR IMPROVEMENT

Q13. What, if anything, do you think this depot could do to improve?

- When asked what improvements could be made to their recently visited depot, around 9 in 10 indicated that no improvements were needed or they could not think of an improvement.
- Among those who provided a suggestion, the most common improvements were *cleaner/empty garbage* and *more accurate refunds* (each suggested by 2% of customers).



OVERALL SATISFACTION

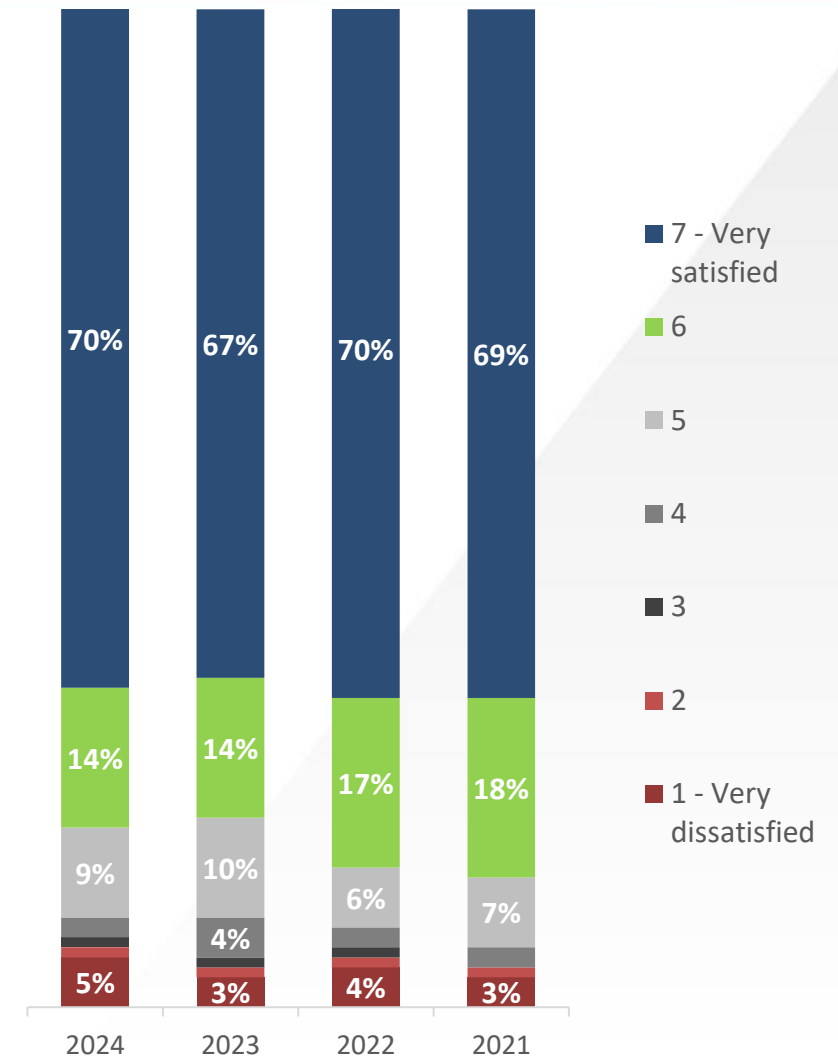
OVERALL SATISFACTION WITH DEPOT

Q2. Using a scale of 1 to 7, where 1 is very dissatisfied and 7 is very satisfied, how would you rate your overall experience at this depot today?

- Overall, over 8 in 10 depot customers were satisfied with their recent depot visit, with 7 in 10 customers saying they were very satisfied. These results are overall similar to previous years.
- Satisfaction with time spent at the depot appears to be highly correlated with overall satisfaction, as 92% of those satisfied with their time spent at the depot were also satisfied with their overall visit. In comparison, only 24% of those dissatisfied with their time spent at the depot were still satisfied with their overall visit.

Demographic insights:

- There were no statistical differences by groups.



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OTHER DEPOT EXPERIENCES

ISSUES WITH RETURNS

Q22. Have you ever brought back a container to a depot that the depot worker would not accept?

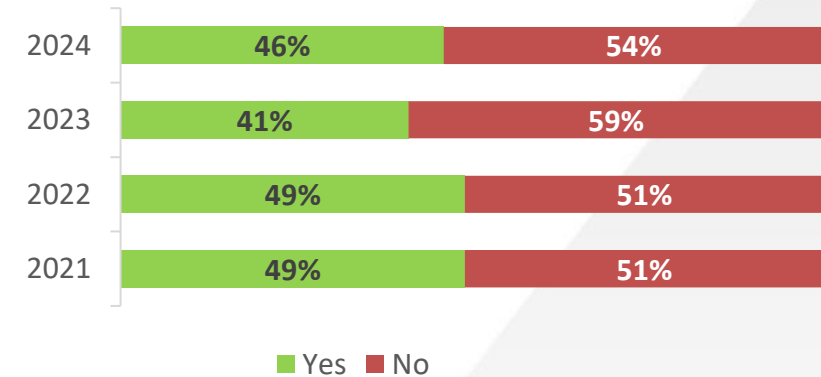
Q23. Did the depot worker explain why they could not accept the container?*

- 46% of customers have brought back a container to a depot that would not be accepted, which is an increase from the previous year.
- 87% of those who brought back a container the depot would not accept were given a reason why, which is the highest proportion to date.

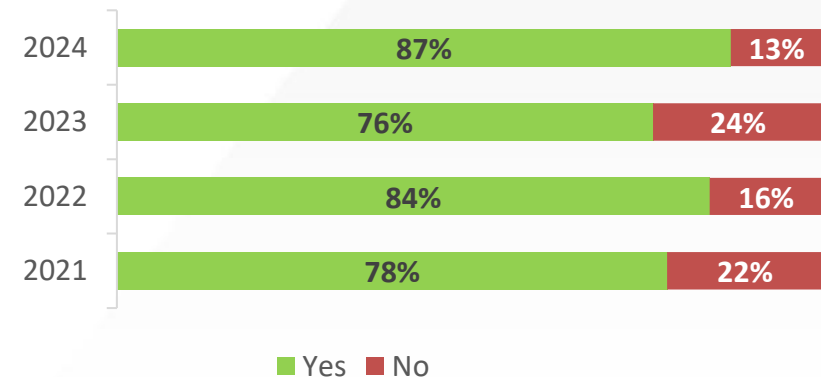
Demographic insights:

- There were no statistical differences by groups.

Unaccepted returns



Reason given



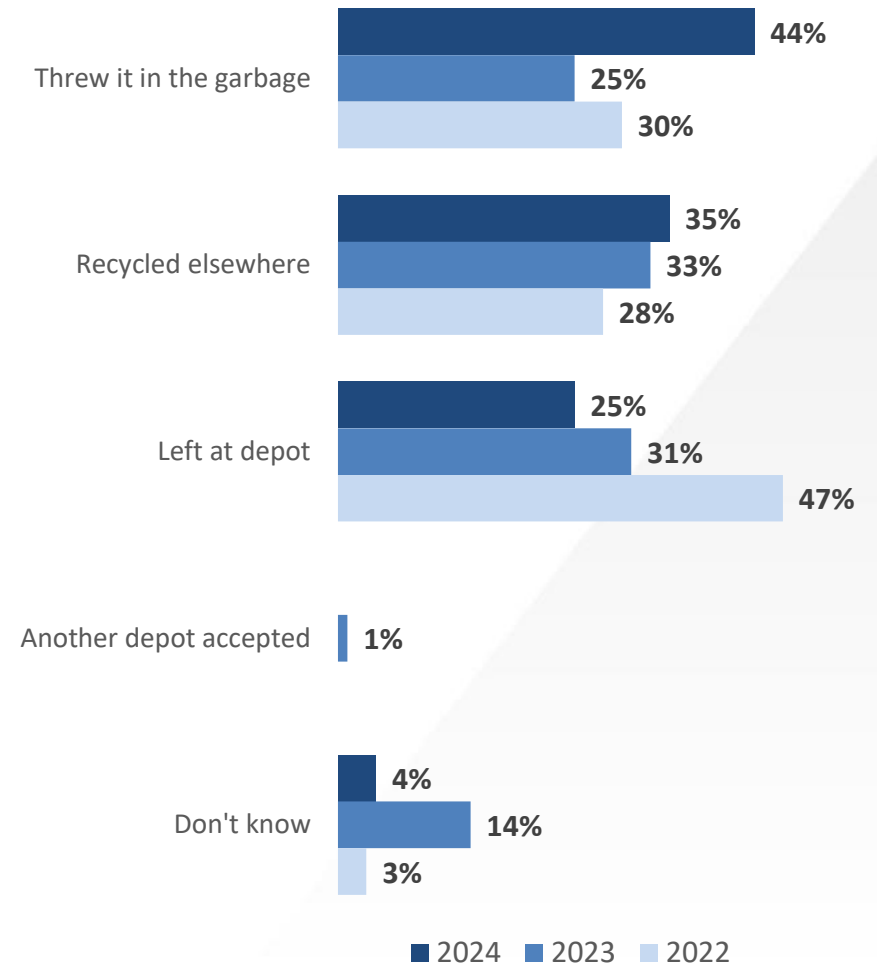
DISPOSING OF NON-REFUNDED CONTAINERS

Q24. What did you (or plan to) do with the container(s) the depot would not accept?*

- In 2024, of those who brought back a container that was not accepted, 44% *threw it in the garbage*, 35% *recycled it elsewhere*, and 25% *left it at the depot*.
- There are some changes in results from the previous year, most notably, an increase in respondents who *threw it in the garbage*.

Demographic insights:

- There were no statistical differences by groups.

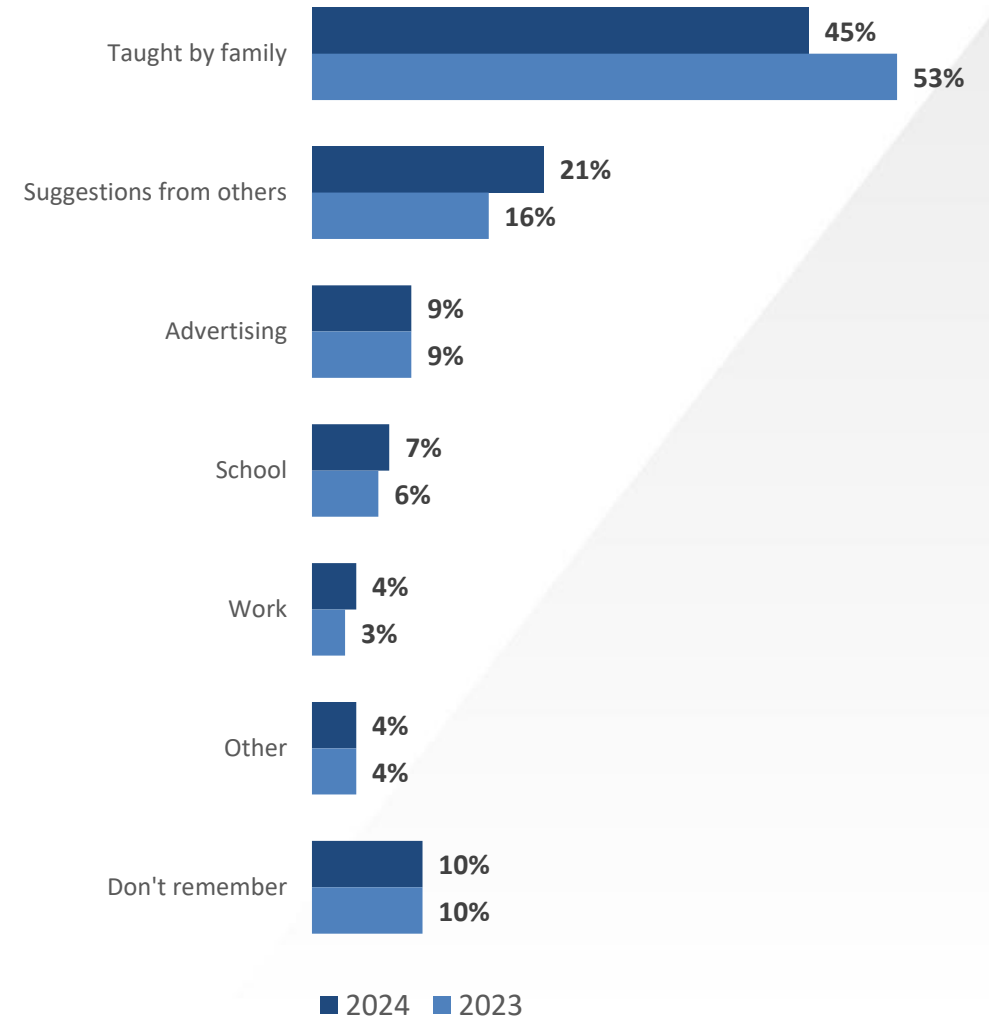


AWARENESS

KNOWLEDGE OF RECYCLING DEPOTS

Q16. How did you first learn to take containers back to a depot?

- When asked how they first learned to take beverage containers back to a depot for a refund, just under half of respondents said they were *taught by their family*, which is the most common response by far.



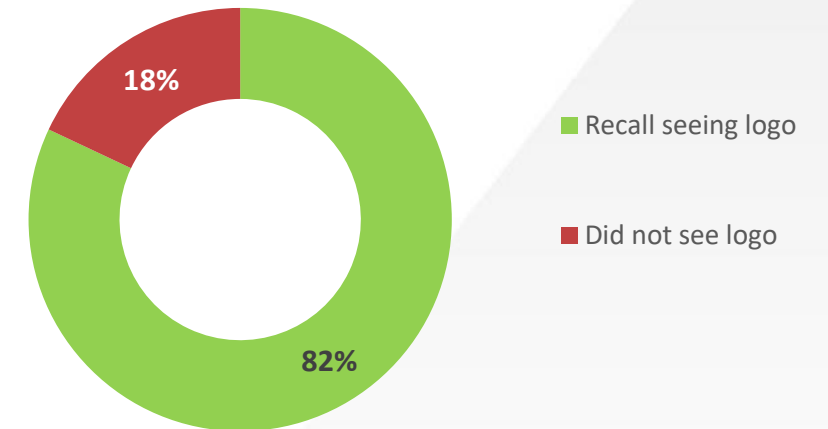
LOGO AWARENESS

Q17. Do you recall seeing this logo during your visit today?

- Overall, 82% of customers who recently visited a recycling depot say that they recall seeing the recycling depot logo.

Demographic insights:

- Customers 65 and older are less likely than younger customers to recall seeing the depot logo during their recent visit.



ALBERTA DEPOT REGULATIONS

Q25. Before this survey, did you know that all depots in Alberta are regulated?

Q26. Does it make a difference to you whether depots are regulated or not?

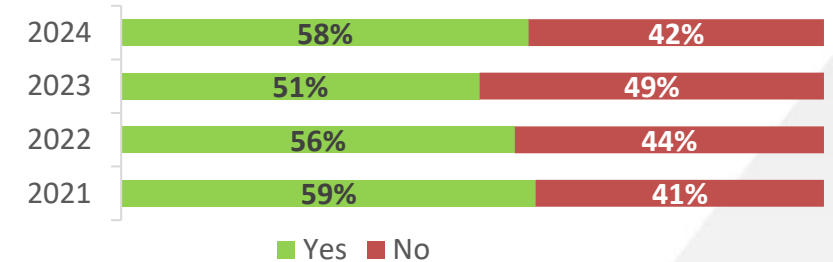
Q27. And before this survey, were you aware that only beverage containers purchased in Alberta are eligible to be returned to an Alberta depot for a refund?

- Over half (58%) of recent depot customers say they are aware that all depots in Alberta are regulated. A slightly smaller proportion of respondents (55%) say that depots being regulated makes a difference to them.
- Seven in ten customers say that they are aware that only containers purchased in the province can be returned for a refund at an Alberta depot.
- Overall awareness and awareness that only containers purchased in the province can be returned for a refund at an Alberta depot have increased from 2023.

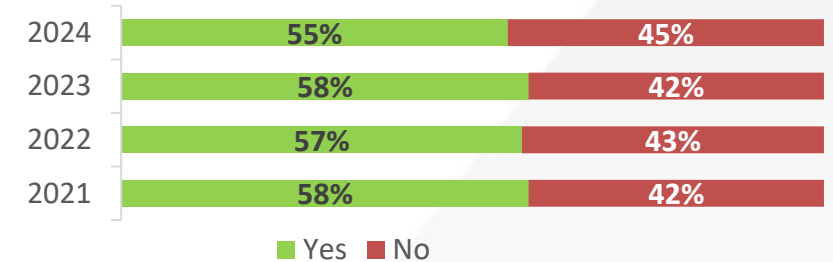
Demographic insights:

- Men and respondents 30 and older tend to be more likely than women and younger respondents to say that they are aware that all recycling depots in Alberta are regulated.

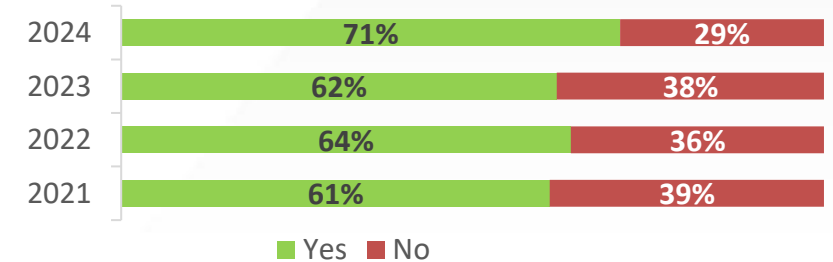
Aware of regulations



Care about regulations



Aware Alberta only



CUSTOMER PREFERENCES AND BEHAVIOURS

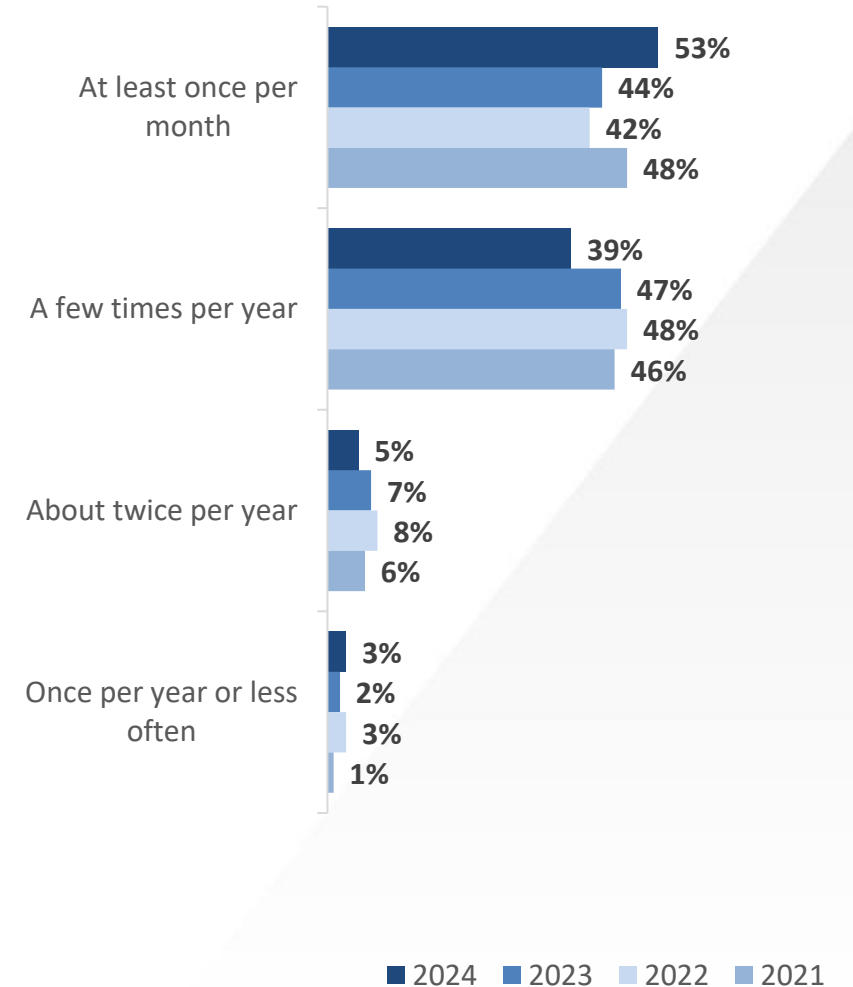
FREQUENCY OF DEPOT VISITS

Q14. Thinking about a typical year, how often would you say you visit any recycling depot to return beverage containers?

- 53% of respondents say that they visit a recycling depot to return beverage containers *at least once per month*, while 39% say that they visit *a few times per year*.
- Customers are more likely to have *visited at least once a month* than in 2023.

Demographic insights:

- There were no statistical differences by groups.



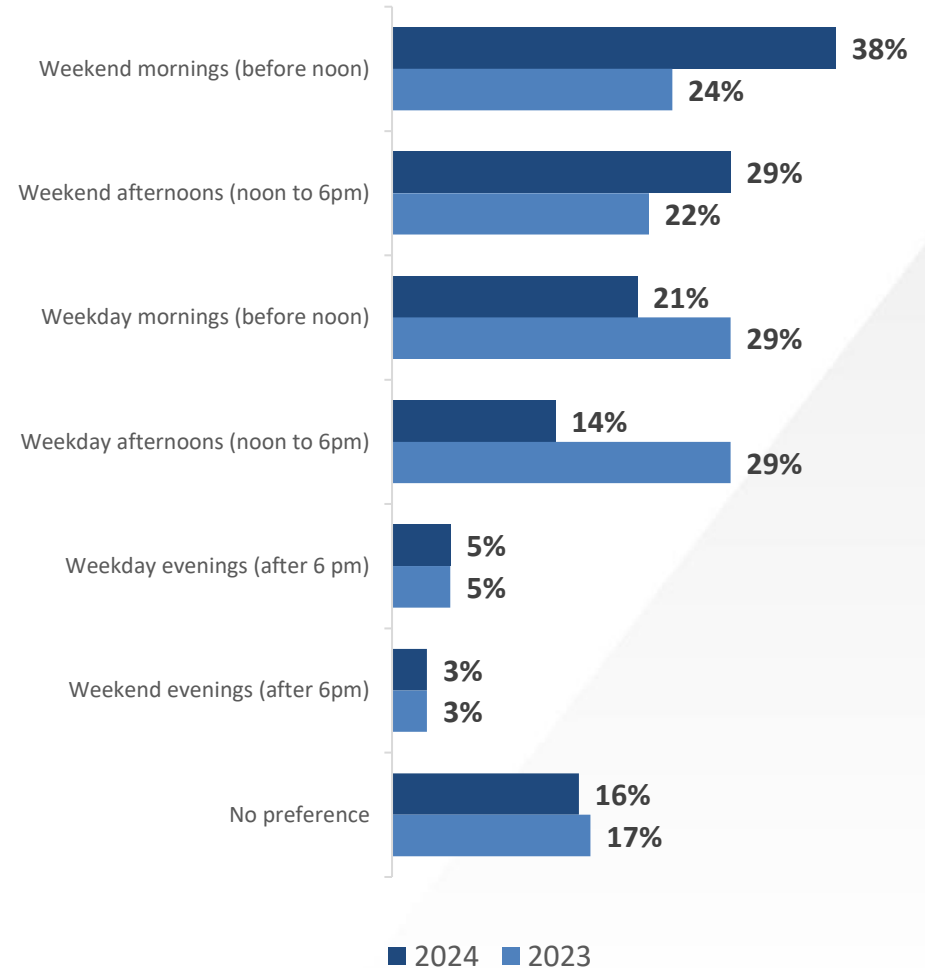
PREFERRED TIME FOR DEPOT VISITS

Q15. Generally, what are your preferred times to visit a depot?

- The most common times respondents say they prefer visiting a depot is *on the weekend*, either in the morning or afternoon.
- There is very little preference in visiting in *the evening*, regardless of the day of the week, however, this is likely because many depots are not open during this time.

Demographic insights:

- Those under 65 are more likely to say their preferred time to visit is weekend mornings or afternoons, while those 65 and over are more likely to prefer weekday mornings.
- Metro depot customers were more likely than urban or rural customers to prefer weekday mornings and less likely to prefer weekend mornings or afternoons.



BEVERAGE CONTAINER DROP-OFF/COLLECTION SERVICE

Q18. If a service was offered where you could drop off your containers without waiting in line and receive your money later, would you use this service?

Q19. If a collection service was offered where you could have your containers picked up from your home/work and receive your money later, would you use this service?

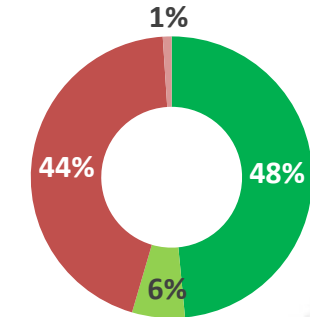
Q20. Was there a fee associated with the service?*

- Only a small proportion of those who recently visited a recycling depot say that they have used either a beverage container drop-off or collection service rather than returning containers to a depot, however, 54% say they would use a drop-off service (or use again), and 51% would use a collection service (or use again).
- Of those who have used a beverage container collection service, 41% say that there was a fee associated with the collection.

Demographic insights:

- As age increases, the interest in using either type of service decreases.

Drop-off service



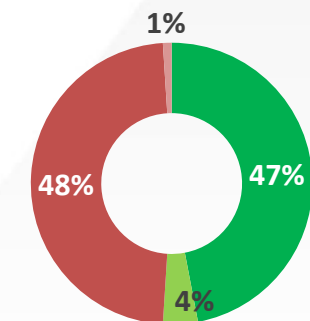
■ Yes, would use

■ No, would not use

■ Already used and would use again

■ Already used and would not use again

Collection service



■ Yes, would use

■ No, would not use

■ Already used and would use again

■ Already used and would not use again

SATISFACTION WITH COLLECTION SERVICE

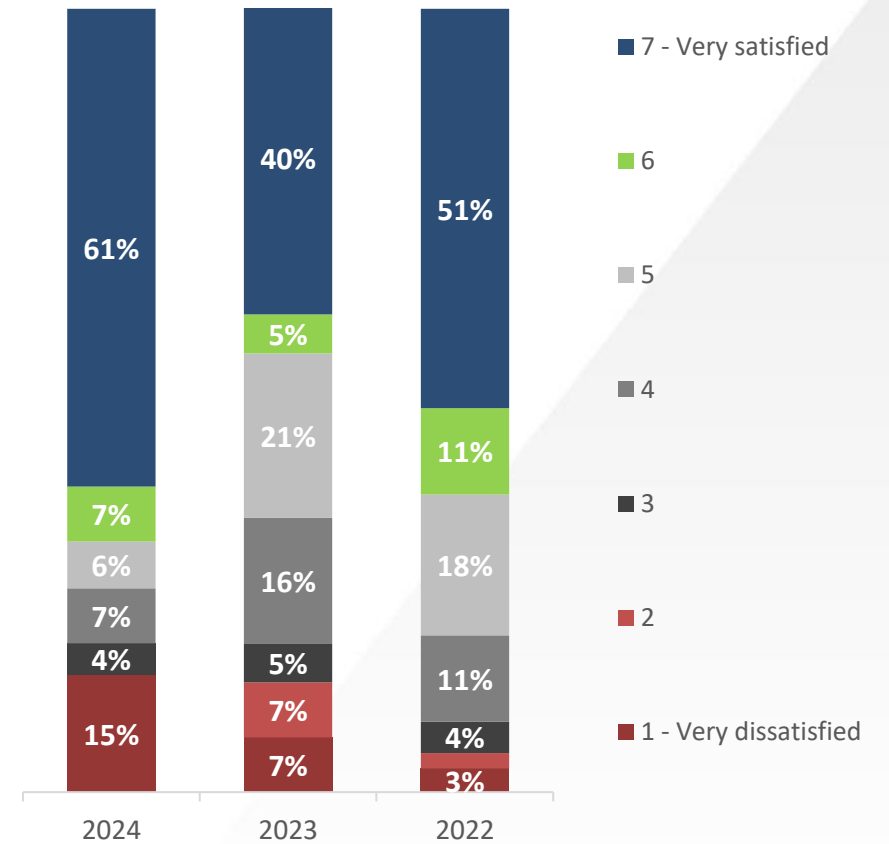
Q21. How satisfied were you with the collection service?

- 69%* of customers who have used a beverage container collection service were satisfied (rating of 6 or 7 out of 7) with the service, which is up from 44%* the previous year.

Demographic insights:

- There were no statistical differences by groups.

Satisfaction with collection service



WILLINGNESS TO TRAVEL TO DEPOTS

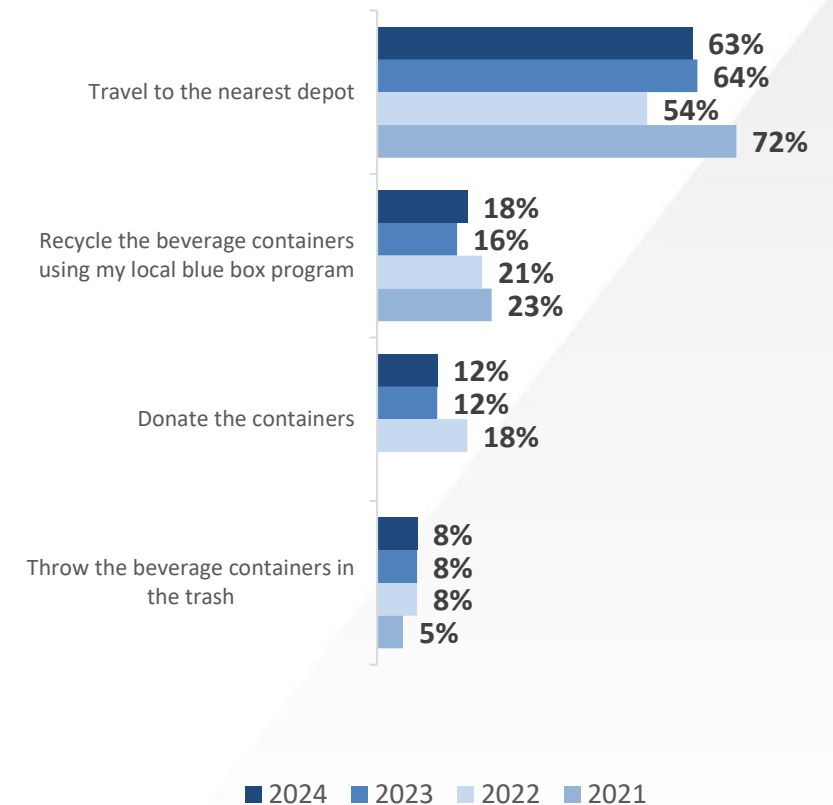
Q28. If you did not have a depot in your local community, or a close neighbouring community, and there were no beverage container collection services available in your area, what would you be most likely to do with your recyclable beverage containers?*

- Nearly two thirds 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 compared to just 8% who would *throw them in the trash*.

Demographic insights:

- There were no statistical differences by groups.

Disposal of containers



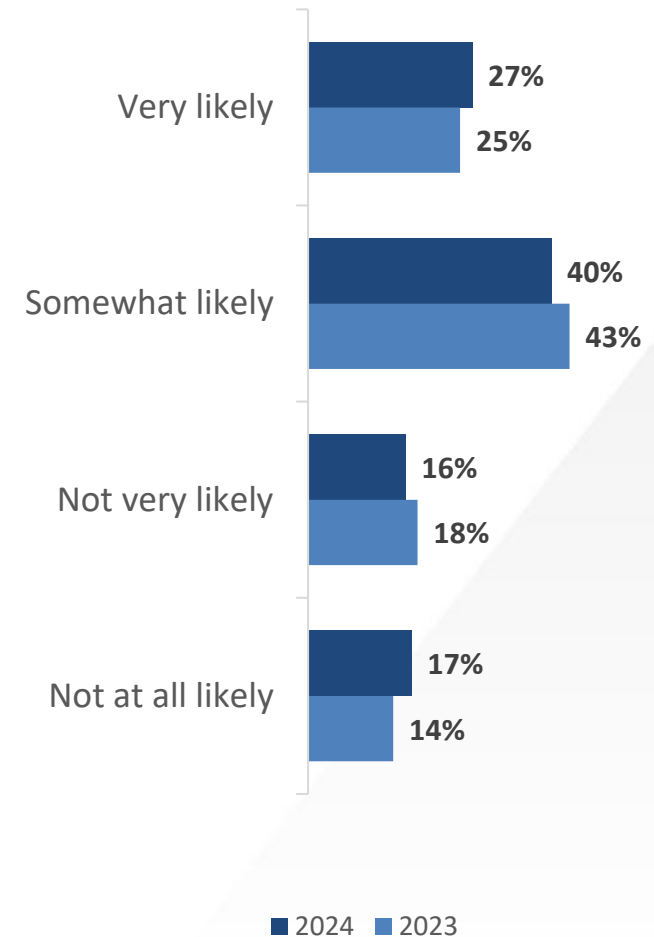
LIKELIHOOD OF USING AUTOMATED COLLECTION STATION

Q29. Similarly, if you did not have access to a bottle depot near you, how willing would you be to use an unmanned automated collection station to return your beverage containers? This would be like a reverse vending machine.

- Overall, respondents appear to be in favour of using automated collection stations to return beverage containers if there were no depot in their area, as two thirds say they would be likely to use this, including one quarter who say they would be very likely.

Demographic insights:

- Customers 65 and older are less likely to say they would use an unmanned automated collection station to return beverage containers than those under 65.



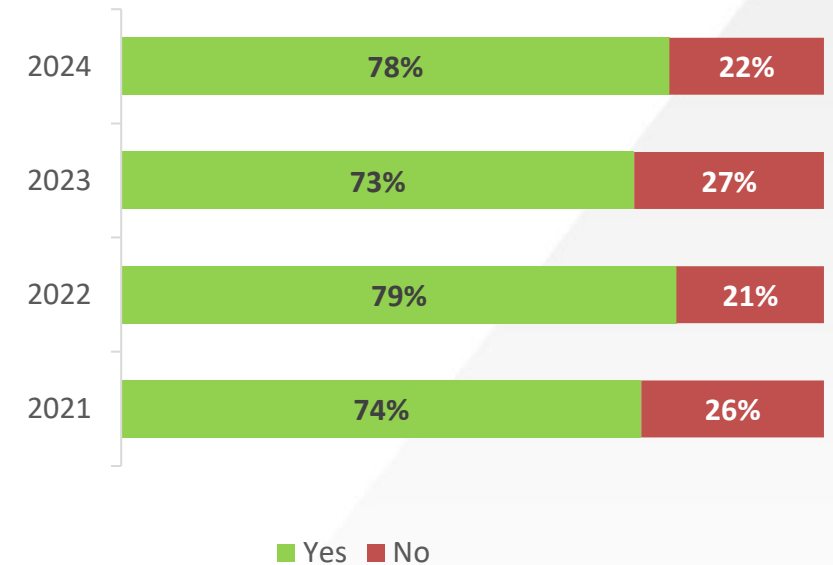
PREFERENCE FOR EXPANDED ELIGIBILITY

Q30. 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?

- 78% 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, which is up from 73% the previous year, but similar to the 79% in 2022.

Demographic insights:

- There were no statistical differences by groups.

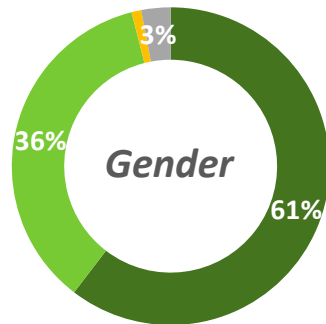


APPENDIX A



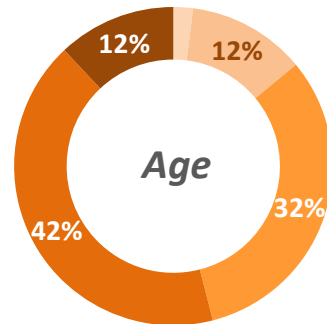
DEMOGRAPHIC PROFILE OF CUSTOMERS

61% Male



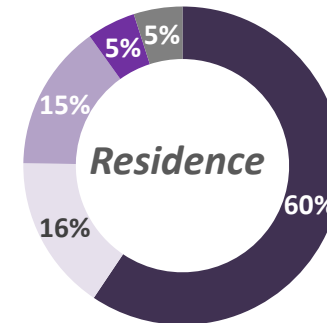
- Male
- Female
- Non-binary
- No response

42% 45 to 64



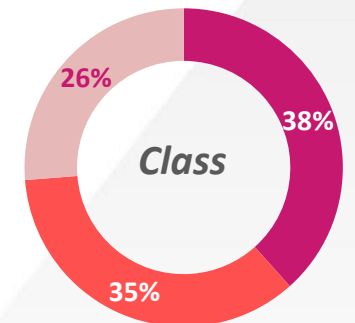
- 13 to 17
- 18 to 29
- 30 to 44
- 45 to 64
- 65 and older

60% Single-family home



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

38% Urban



- Urban
- Metro
- Rural

2024 PARTICIPATION BY DEPOT

Classification	Depot	Municipality	Completed surveys	Classification	Depot	Municipality	Completed surveys
Urban	Airdrie Bottle Depot	Airdrie	40	Metro	Forest Lawn Bottle Depot	Calgary	55
Rural	Banff Bottle Depot	Banff	46	Metro	Happy Can Bottle Depot	Calgary	40
Metro	Beddington Heights Bottle Depot	Calgary	63	Urban	High River Bottle Depot	High River	61
Rural	Beiseker Bottle Depot	Beiseker	18	Rural	Langdon Bottle Depot	Langdon	52
Rural	Blackfalds Bottle Depot	Blackfalds	16	Metro	Manchester Bottle Depot	Calgary	22
Urban	Canmore Bottle Depot	Canmore	53	Metro	Marklan Bottle Depot	Calgary	13
Rural	Carbon Bottle Depot	Carbon	10	Metro	Monterey Bottle Depot	Calgary	55
Urban	Chestermere Bottle Depot	Chestermere	16	Metro	North Hill Bottle Depot	Calgary	58
Urban	Cochrane Bottle Depot	Cochrane	47	Urban	Okotoks Bottle Depot	Okotoks	62
Urban	Cosmos I Bottle Depot	Red Deer	33	Rural	Olds Bottle Depot	Olds	46
Urban	Cosmos II Bottle Depot	Red Deer	35	Metro	Saddleridge Bottle Depot	Calgary	26
Rural	Cremona Bottle Depot	Cremona	8	Urban	South Hill Bottle Depot	Red Deer	31
Rural	Didsbury Bottle Depot	Didsbury	23	Urban	Strathmore Bottle Depot	Strathmore	50
Rural	Drumheller Bottle Depot	Drumheller	51	Metro	Sunridge Bottle Depot	Calgary	12
Metro	East Hills Bottle Depot	Calgary	54	Rural	Vulcan Bottle Depot	Vulcan	27