



Beverage Container Return Study 2009

Key Highlights – Sandy Sigmund, Encorp Pacific (Canada)



Program knowledge and awareness continues to be strong.

- As in other years, program knowledge is quite high, with near universal awareness of all beverages that come in containers that can be returned for deposit, as well as the containers themselves.
 - As might be expected, less frequently used containers have slightly lower awareness levels.
 - Further, knowledge of specific deposit values is not excellent.
- Overall, it is clear that BC residents know where to return containers for deposit, with City of Vancouver having slightly lower awareness.
 - Specifically, depots are top-of-mind, with high awareness overall.

Depots and building recycling facilities are most commonly used, depending on dwelling type.

- When it comes to methods for dealing with containers, regardless of the type of container or the location in (e.g., home, work, or at leisure), returning to bottle depots, as well as using public recycling facilities or building recycling (for those in multi-family dwellings), continue to be the most frequently used locations.
 - When at home, bottle depots are the predominant method, followed closely by building recycling facilities and liquor or grocery stores. When at work, the work facilities are easily most preferred and while at leisure, there is a toss up between using public recycling and taking the containers home to deal with them there instead.
 - City of Vancouver residents make less frequent use of these methods here.

Discarders: young male urbanites ... more prone to discard when outside the home.

- One in twenty consumers indicate that they will regularly discard containers (5%), while one-tenth will do so at least occasionally, regardless of container type or location.
- A clear picture of those who indicate that they are 'discarders' emerges: they are more likely to be younger (18 to 34), male, single, have less formal education, and live in more urban areas. They are also more likely to be employed outside the home. Household income is not a factor.
- There are different degrees of discard behaviour depending on where and what type of container.
 - Discard behaviour is more prevalent at leisure or at work compared to at home.
 - Those who are discarding are more likely to throw away **any** container than specific types. However, drink boxes are being discarded the most frequently (just marginally above other container types).
 - Coinciding with overall awareness of what containers can be returned for refund, drink boxes, cartons and bag-in-a-box are thrown out more frequently, compared to aluminum cans, glass and plastic bottles.
 - When it comes to this discard behaviour, City of Vancouver multi-family dwellers are more prone to doing so than other regions of the province.

Ease of recycling is a big motivator and barrier.

- Recycling is the key motivator for returning containers. While consumers tell us they return containers for the refund nearly as much as to ensure the containers are recycled, the latter is stronger overall.
- Discarding is largely due to a perceived 'inconvenience' of dealing with the containers, particularly when out-of-home. Behind this appears to be a general lack of concern or caring for their actions in this regard.

Bottle depots close enough; except in Vancouver.

- A majority of consumers across BC (71%) perceive themselves to be close to a bottle depot (based on their own definition of closeness) with the exception of Vancouver (54%), where nearly half do not believe they are close enough.

Bottle depots are widely used but visitation is less frequent than to stores likely due to volume.

- Nearly half of all consumers visited a bottle depot in the past month to return their containers, compared to just one-quarter who visited grocery or liquor stores for the same purpose.
- Across all locations, returns happen every two to three months or more often (three-quarters of visitors to any of these locations go that often). Visitation to grocery stores is the most frequent (more often visiting 1+ times/week). Bottle depot visitation is less frequent, more often about every one to three months.

Bottle depots visited because they are 'convenient'.

- Top motivators for visiting depots over going elsewhere are largely convenience related: primarily, the depot is faster and doesn't have a limit on containers. Closeness of the depot and the depot taking other items also has an impact, but somewhat less so.
- Actually ensuring that recycling occurs does not have a large impact in the decision-making process, which seems to reflect universal trust that this is happening in all return locations.

Key Highlights (cont.)

High satisfaction with bottle depots; top marks for employees and convenience.

- Of those who visit a bottle depot regularly, there is high satisfaction with them overall (93% are either somewhat or very satisfied), as well as on the majority of specific aspects relating to them.
 - Satisfaction with the employees overall is quite high across the board, and some convenience-related factors also receive high ratings (specifically, opening hours, accessible locations and being able to get in and out easily/quickly).
 - Having enough carts and baskets as well as parking do not receive as high satisfaction scores, nor do depot-related factors such as cleanliness, smell, and having washing stations.

Encorp and Return-It are well-known.

- Three-quarters of all BC consumers are aware of the Encorp or Return-It brands, which is trending upward over time. There is high overall positive perception of either brand (94%), and those aware are able to correctly identify what the organization does.

Annual Tracking and Benchmarking

- While a more in-depth summary of tracking results is provided in the tracking section at the end of this report, some notable points can be made:
 - In the workplace, fewer consumers are holding on to containers or taking them home this wave. The same is true for leaving them for someone else.
 - At leisure, fewer individuals indicate taking their containers home and less also indicate throwing away their containers.
 - Bottle depot awareness has decreased over recent waves, whereas awareness of Return-It has continued to increase.
 - Alcohol return behaviour has increased more at Encorp locations compared to liquor stores specifically (which has also increased but not by as much). Similarly, non-alcohol return behaviour has increased at Encorp locations over all other options.

Regional Analysis

- Again, a more in-depth summary of regional results are provided at the end of this report. However, of note, awareness levels of both types of beverages as well as the containers themselves are lower in the City of Vancouver specifically.