

Depot Satisfaction Survey

2016



Beverage Container Management Board

2016 Depot Satisfaction Survey

Background and Methodology

The Depot Satisfaction Survey measures the performance of the Collection Service Agent (Alberta Beverage Container Recycling Corporation), the Collection Service Provider (Brewers Distributor Limited) and the regulator (Beverage Container Management Board). The depot network is asked to evaluate all three parties on a series of service questions.

In October 2016, the Beverage Container Management Board (BCMB) conducted the annual Depot Satisfaction Survey for the third year in a row. The survey has been conducted annually to evaluate industry partners on a fiscal year cycle and provide ABCRC, BCMB and BDL with an appropriate timeline for action plans. Depot operators were asked to complete the survey via web survey ahead of the ABDA conference, and during the conference if they had not already done so. The Alberta depot network currently consists of 216 universal bottle depots. 167 depot operators completed the 2016 Depot Satisfaction Survey while at the conference, resulting in a 77% completion rate. This is the highest engagement since the survey cycle began.

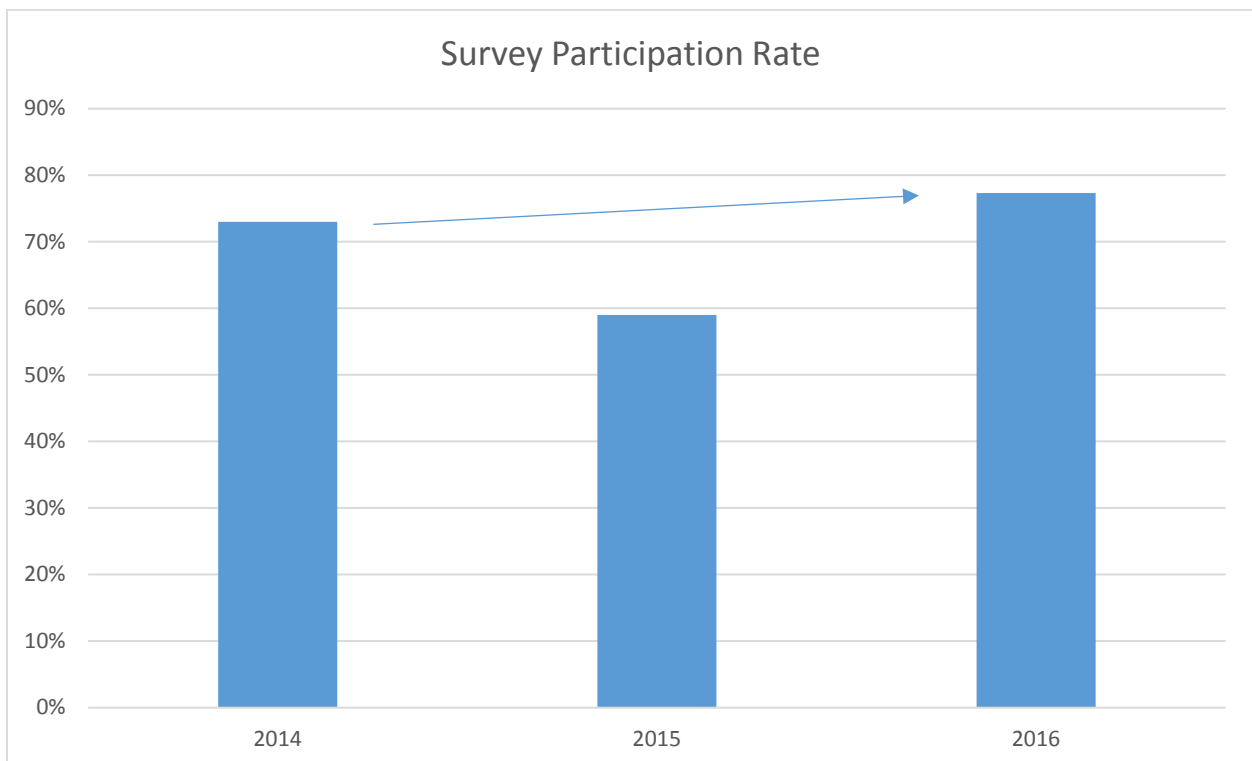


Chart 1

3 year comparitor (2014, 2015, 2016)

Survey Terminology

The 2016 Depot Satisfaction Survey utilized a rating system of one (1) to seven (7), where:

- A rating of 6 or 7 = highly satisfied “HIGH”
- A rating of 4 or 5 = moderately satisfied “MODERATE”
- A rating of 1, 2 or 3 = not satisfied “LOW”

Executive Summary

The 2016 survey represented some significant changes from previous years both in Depot engagement and the positive changes in Depot feedback to industry partner Operations.

There was a general theme related to ABCRC Supplies and Carrier Service that showed a positive response from the network. Improved communication across the industry was also observed. However, individual comments indicated that there were some challenges articulating and resolving certain issues through the Quality Monitoring tool.

Notable areas to highlight in the report include the following:

ABCRC

a. Supplies: The quantity and quality of both Mega Bags and Pallets were markedly improved from previous years. Increases in those Depots scoring ABCRC 6 or 7 out of 7 was upwards of 20% in these areas. In tandem to this was a significant decrease in the number of Depots scoring ‘LOW’ (3 or lower). These results are indicative of improved inventory control and supply management.

b. Communication: Ability to contact staff and the response time when handling a concern were both areas where there was an increase in satisfaction from 2015. Results in the ‘HIGH’ category were broadly similar to 2014. However, there were reductions in the number of depots scoring ABCRC ‘LOW’ in both these categories suggesting that availability and response have improved over time.

c. Designated Carrier: ‘HIGH’ satisfaction with ABCRC Carrier service has continued to improve Year over Year with over 65% of the network scoring 6 or 7 in this category in 2016. Significantly those not satisfied with carrier service has dropped from 9% in 2015 to under 2% in 2016

d. Depot Teams and Community Champions Program: A series of new questions were asked in 2016 to review Depot exposure to the Depot Teams and Community Champions Program. Approximately 33% of the Depots polled were unaware of the ‘Depot Teams’. Further, only 15% responded that they’d used the Depot Team in 2016. For those who did access a Depot Team 90% were either moderately or highly satisfied with the experience.

The awareness of the Community Champions Program was lower than expected with 49% of Depots polled not being aware of the CCP. However, 70% of the network would like more information.

BCMB

e. Communication: As with ABCRC, there has been an increase in Depots who are satisfied with communication with the BCMB. 64% of the network are highly satisfied with their ability to contact the BCMB and less than 2% scoring 'LOW' in this area. Positive feedback was also received for the response time to requests.

f. Refund Compliance: There was a decrease in 2016 with those Depots highly satisfied with the timeliness and receipt of Mystery Shopper audits. However, a slight drop was seen for those scoring the BCMB 'LOW' in this area.

g. PAP Process: There has been a Year over Year reduction since 2014 with the number of Depots scoring the BCMB 'LOW' in this category.

BDL

i. Communication: This category has dropped in Depot Satisfaction from 2015. Less than 50% of Depots now score BDL 'HIGH' in both 'ability to reach' and 'timeliness of communication'.

j. Supplies: Quality of supplies was noted as an area of high satisfaction with the Depot Network. Of all 167 respondents to this survey not one Depot scored BDL 'LOW' in either of these two categories.

Action Plans

For the first time in 2016 the Depot Network was surveyed on the success of the Annual 'Action Plans' that were presented at the 2016 Regional Meetings in Feb/March. These plans identified the response that each organization would take to improve on areas highlighted in the 2015 survey. The number of respondents who responded 'NOT SURE' largely correlates with the number of Depots who didn't attend the Regional Meetings and therefore may have been unaware of content.

The results showed a similar spread for each of the three industry partners with the number of Depots who were highly or moderately satisfied being somewhat similar.

ABCRC Analysis

1. Overall Satisfaction with ABCRC

The 2016 survey showed an increase in overall satisfaction with ABCRC Operations with improved scoring in the 'HIGH' categories and significant reduction in depots scoring 'LOW'.

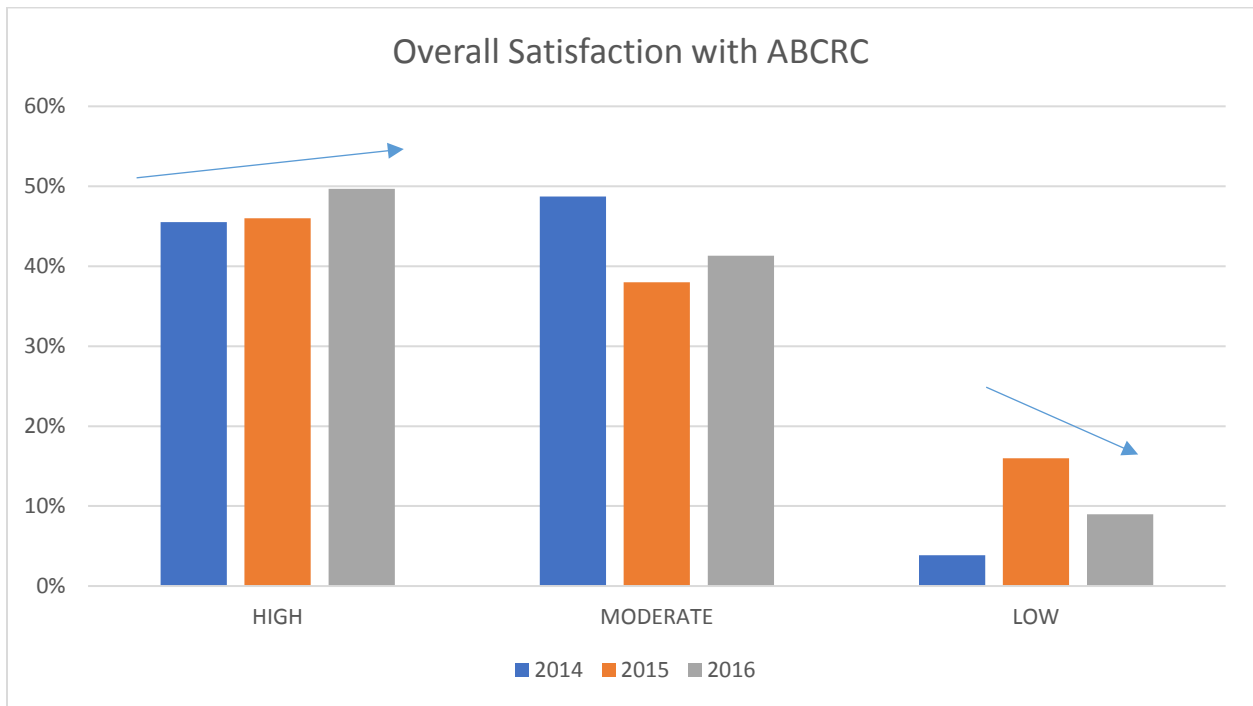


Chart 2

(2014,2015,2016)

2. Satisfaction by Service Requirement in October 2016

The following graph displays a breakdown of all service requirements provided by ABCRC.

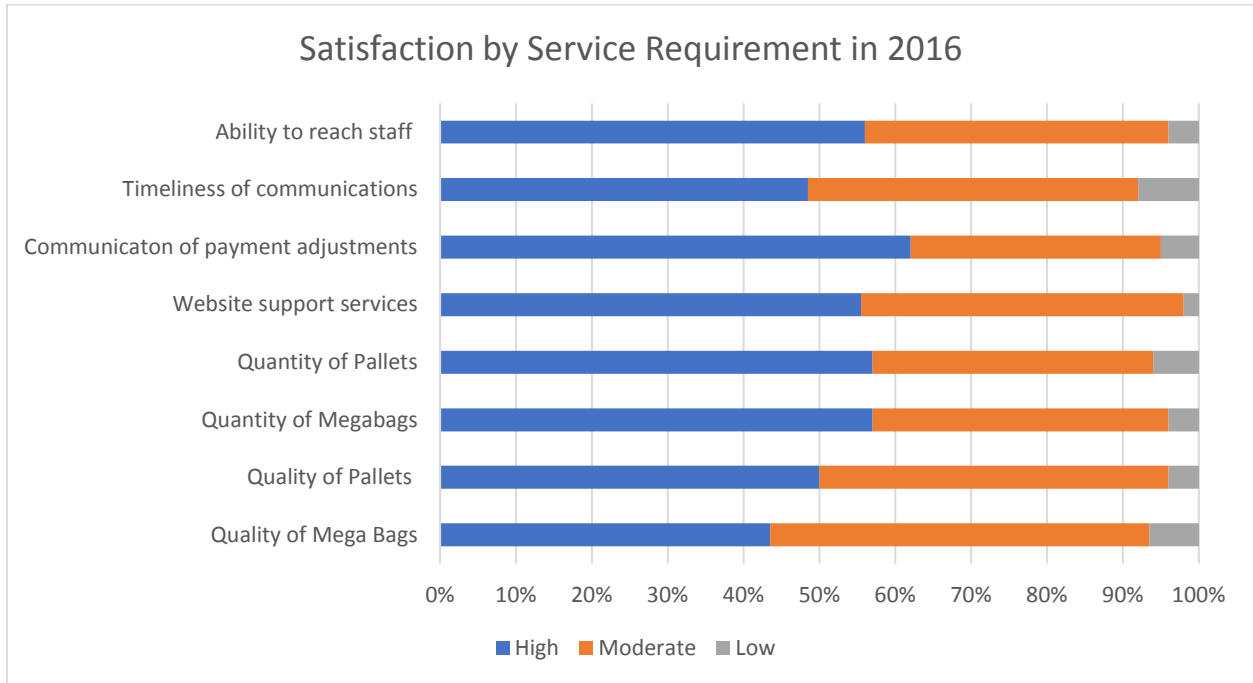


Chart 3

3 Years (2014,2015,2016)

Depots rated the questions on a scale of 1-7.

A rating of 6 or 7 = highly satisfied "HIGH"

A rating of 4 or 5 = moderately satisfied "MODERATE"

A rating of 1, 2 or 3 = not satisfied "LOW"

3. Satisfaction with Key Service Indicators for ABCRC

Ability to Contact ABCRC Staff

Scoring for 2016 was comparable to the 2014 survey but was an improvement from 2015.

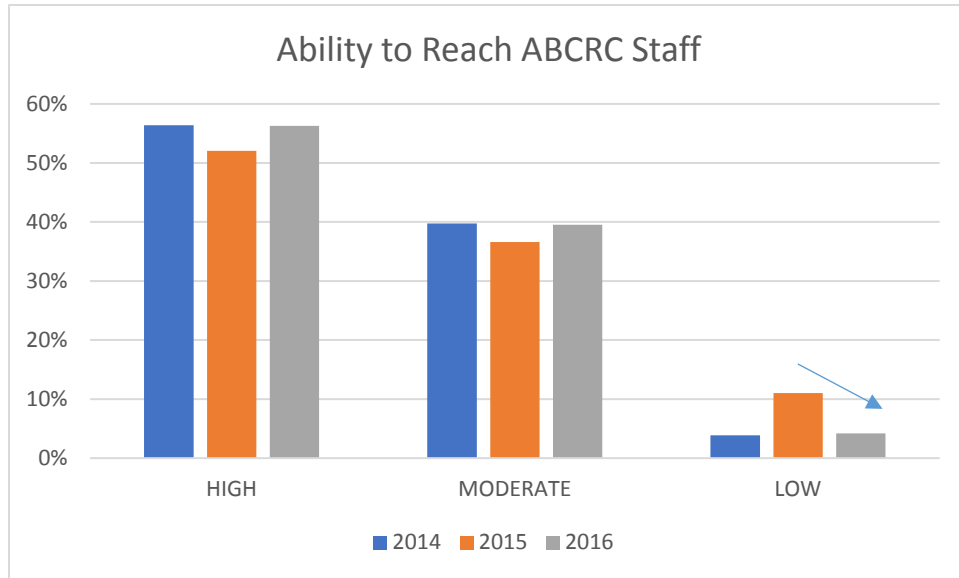


Chart 4

3 Years (2014,2015,2016)

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A rating of 1, 2 or 3 = not satisfied "LOW"

How quickly ABCRC responds when a request is made

A small increase in 'HIGH' satisfaction was noted for 2016 and an improvement in the number of depots responding with a 'LOW' opinion of ABCRC's response time.

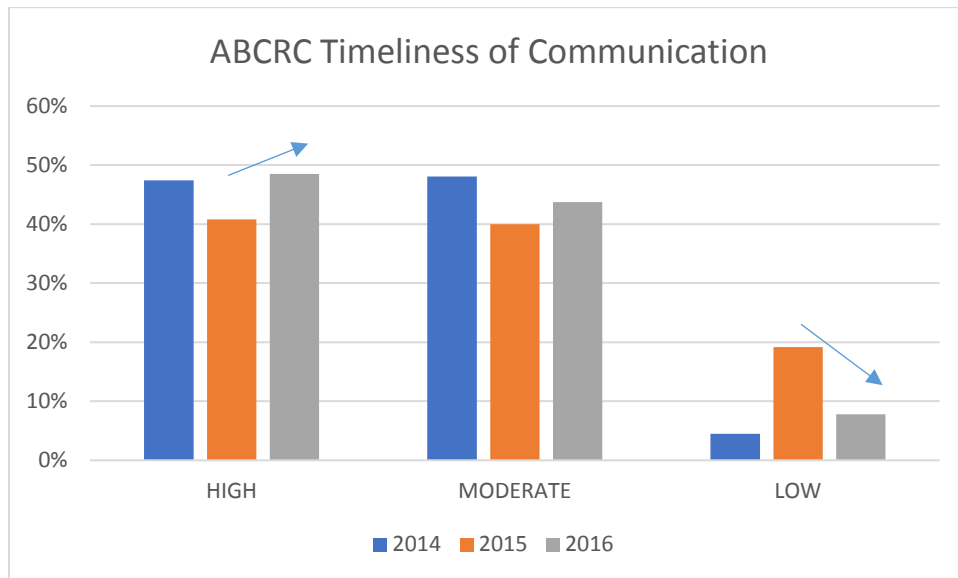


Chart 5
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Communication of Payment Adjustments

Significant improvement is noted in 2016. 'MODERATE' satisfaction has remained constant for this year with an increase in 'HIGH' and decrease in 'LOW' satisfaction ratings.

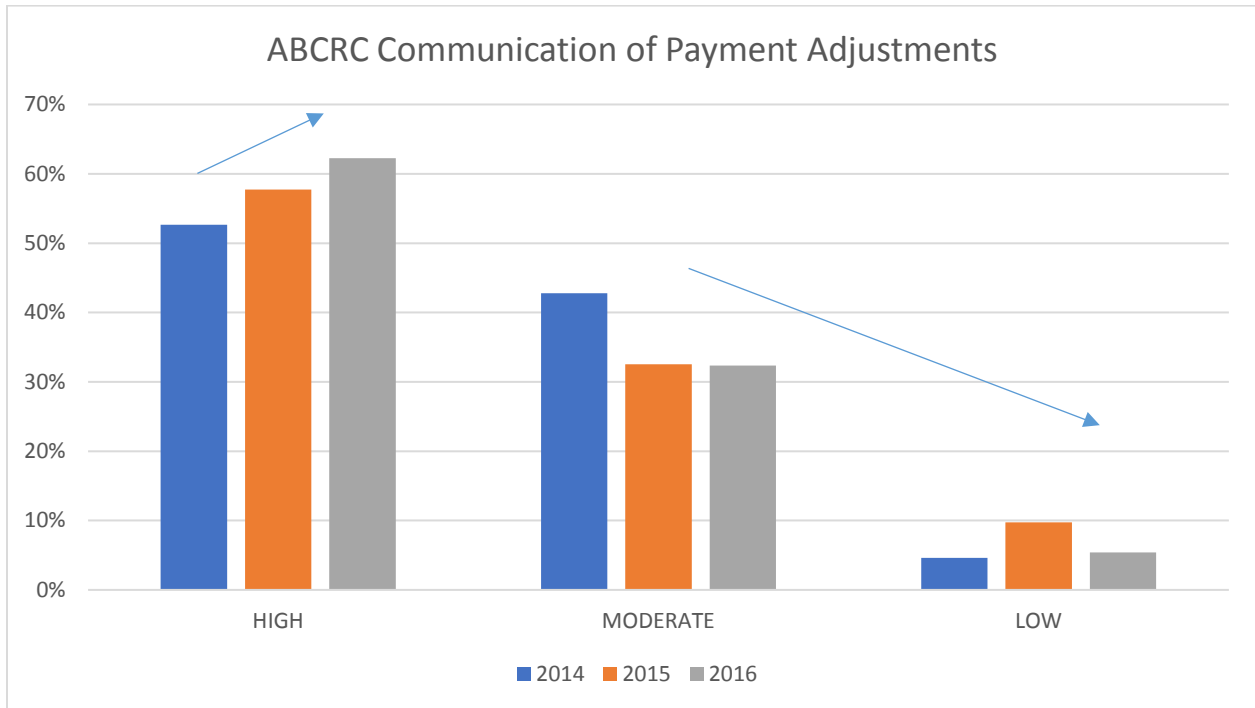


Chart 6
3 Years (2014,2015,2016)

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A rating of 1, 2 or 3 = not satisfied "LOW"

Quantity of Pallets from ABCRC

Significant improvements have been seen this year in responses to all questions on ABCRC supplies. The trend in quality and quantity of Mega Bags and Pallets has been consistent with substantial increases in positive responses in the 'HIGH' category and reductions in the number of Depots scoring ABCRC 'LOW'.

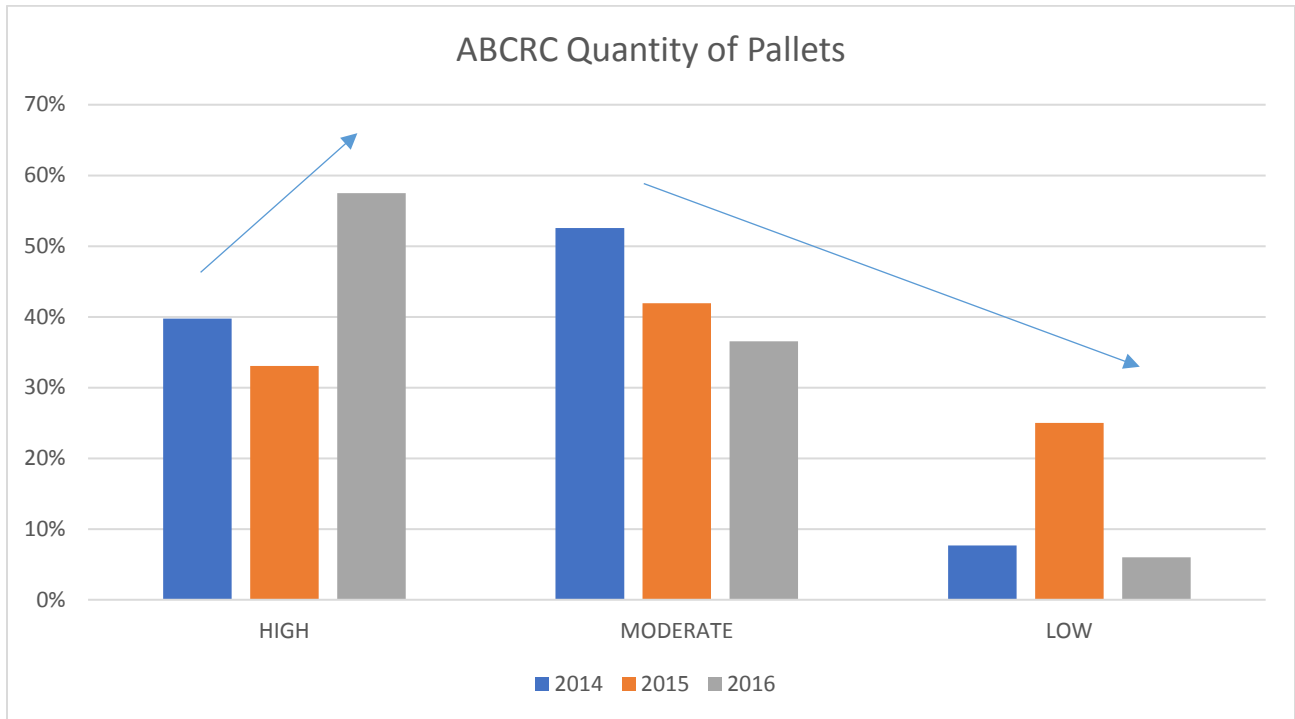


Chart 7
3 Years (2014,2015,2016)

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A rating of 1, 2 or 3 = not satisfied "LOW"

Quantity of Mega Bags

Mega Bag quantity has seen a swing from 39% 'HIGH' in 2015 to 57% in 2016. Low satisfaction represents less than 4% of the polled Depots.

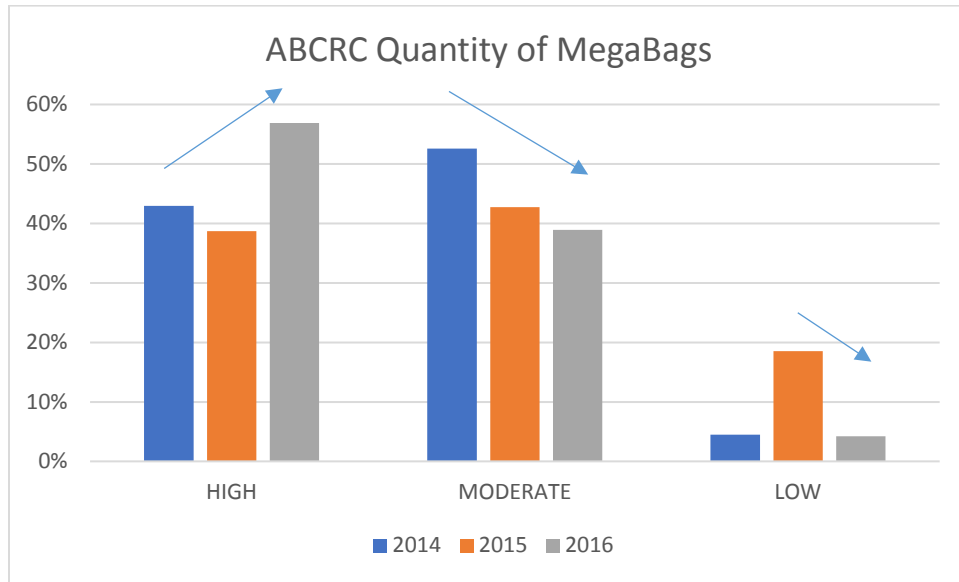


Chart 8
3 Years (2014,2015,2016)

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A rating of 4 or 5 = moderately satisfied "MODERATE"

A rating of 1, 2 or 3 = not satisfied "LOW"

Quality of Pallets from ABCRC

2016 results for 'quality of pallets' are consistent with those seen in the 'quality of Mega Bags' category

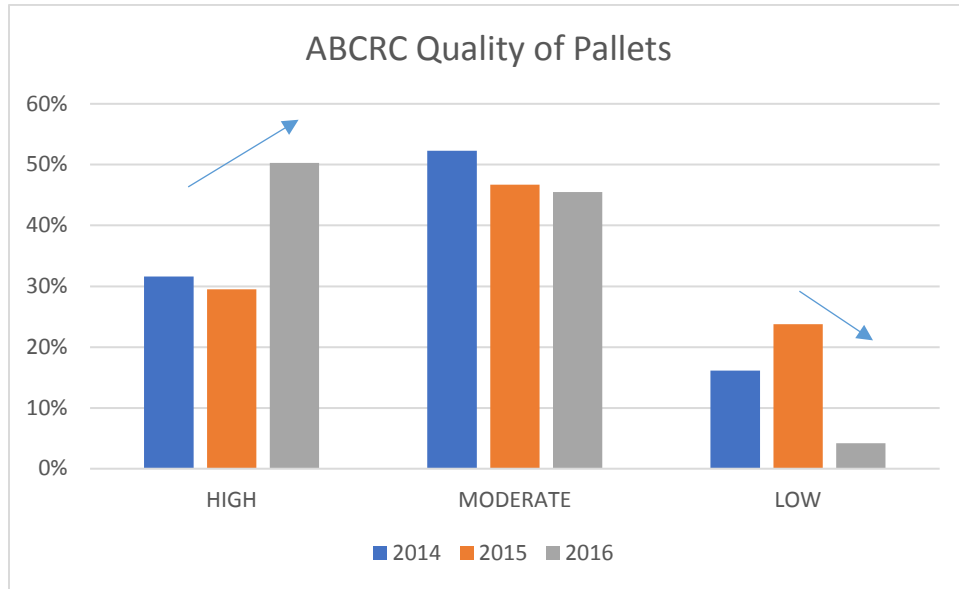


Chart 9
3 Years (2014,2015,2016)

Depots rated the questions on a scale of 1-7.

A rating of 6 or 7 = highly satisfied "HIGH"

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A rating of 1, 2 or 3 = not satisfied "LOW"

Quality of Mega Bags

43% of Depots scored ABCRC 6 or 7 out of 7 in 2016 for Mega Bag quality. This is up from 27% in 2014.

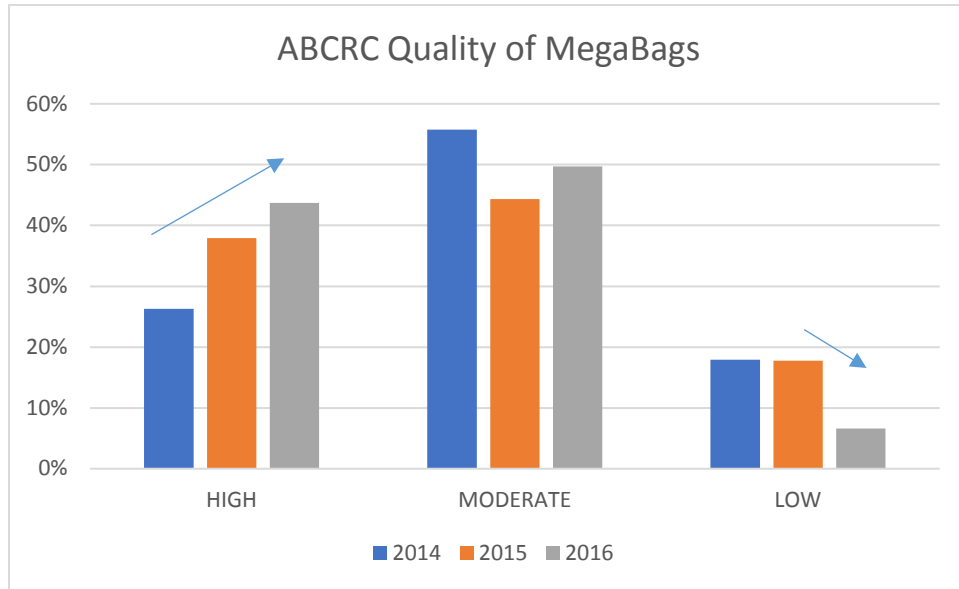


Chart 10
3 Years (2014,2015,2016)

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A rating of 1, 2 or 3 = not satisfied "LOW"

Website Support Services

Positive improvements from 2015 in the 'HIGH' category are noted. Approximately 75% of Depots are accessing the Web Portal more than once a month.

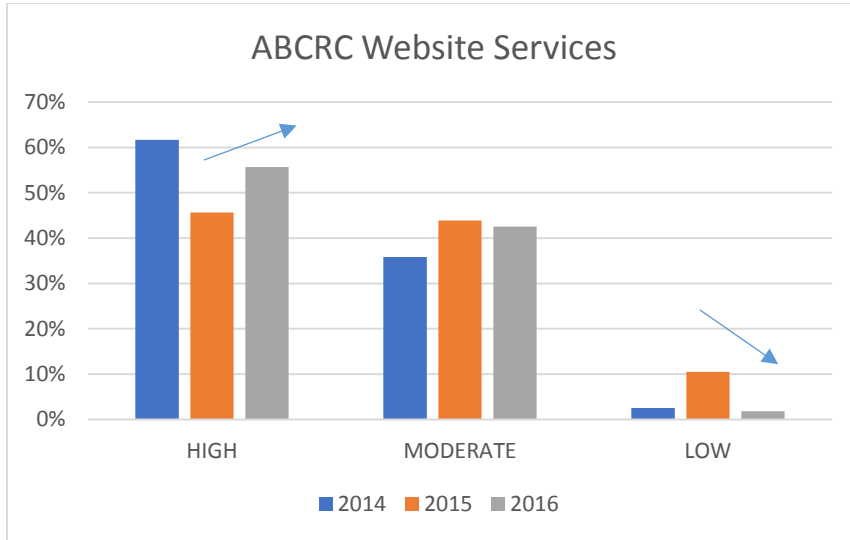


Chart 11
3 Years (2014,2015,2016)

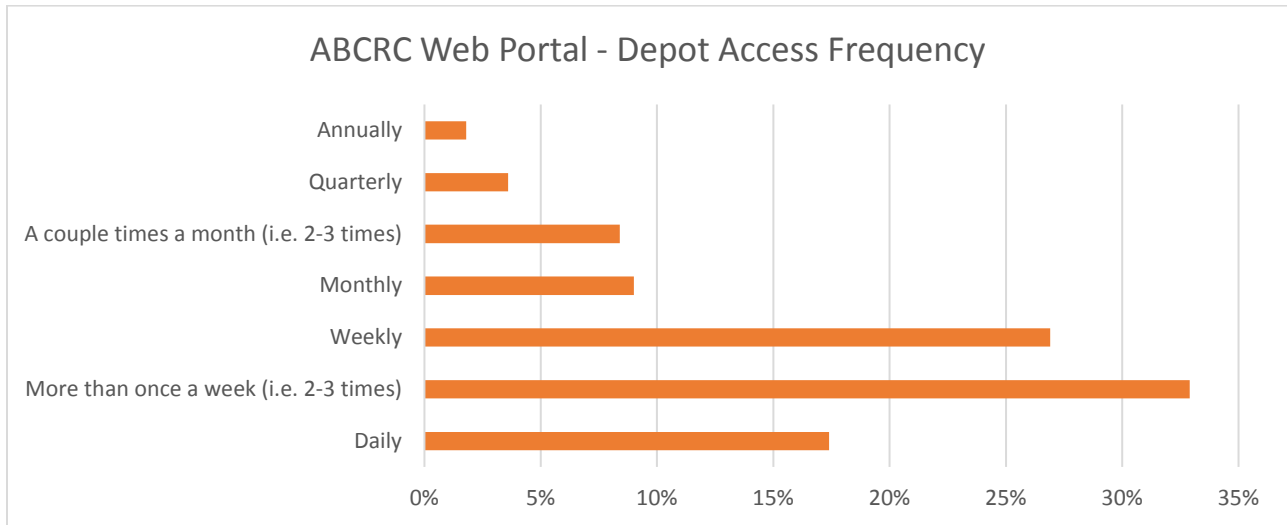


Chart 12
(2016)

Depots rated the questions on a scale of 1-7.

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A rating of 4 or 5 = moderately satisfied "MODERATE"

A rating of 1, 2 or 3 = not satisfied "LOW"

4. Service Provided by Designated Carrier

'HIGH' satisfaction with ABCRC Carrier service has continued to improve Year over Year with over 65% of the network scoring in this category. Also noted is the significant reduction in those scoring this 'LOW'.

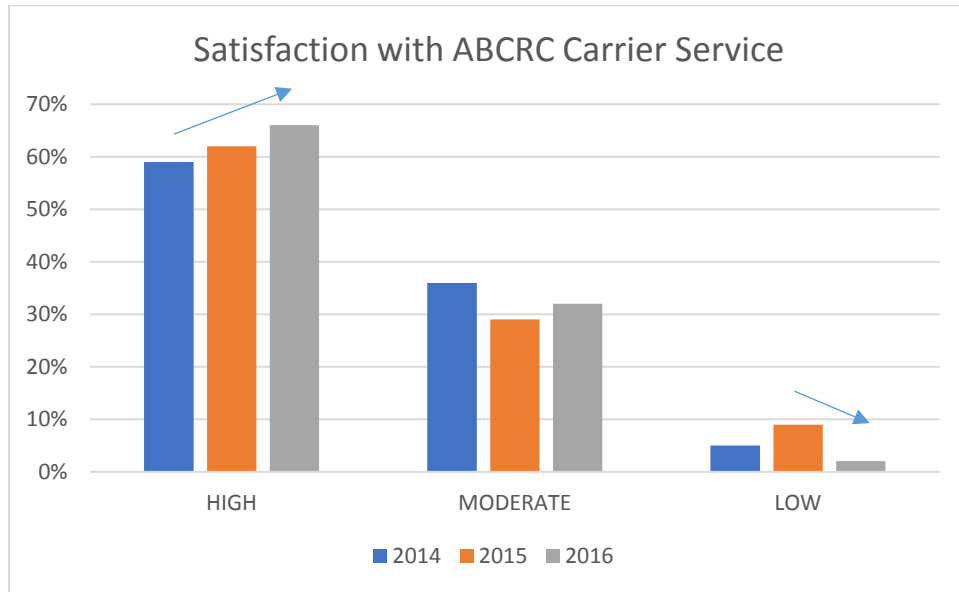


Chart 13
3 Years (2014,2015,2016)

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5. Depot Teams & Community Champions Program

There were several new questions related to ABCRC for 2016. These were focused on Depot awareness of 'Depot Teams' and the Community Champions Program.

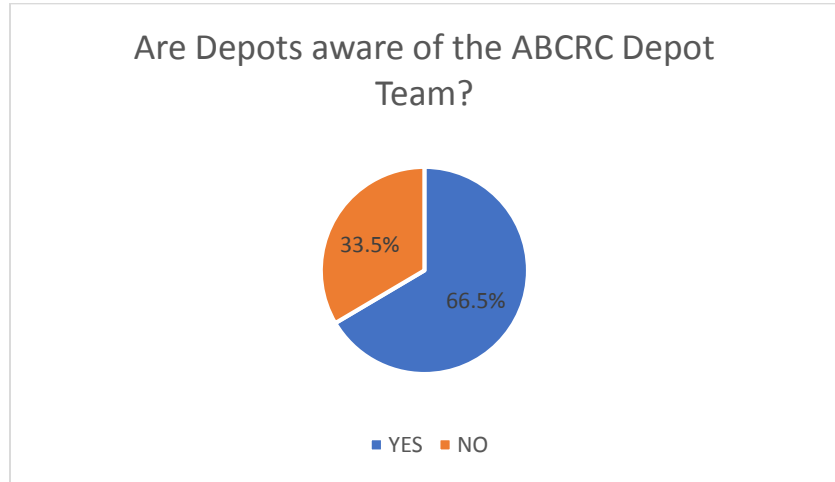


Chart 14
(2016)

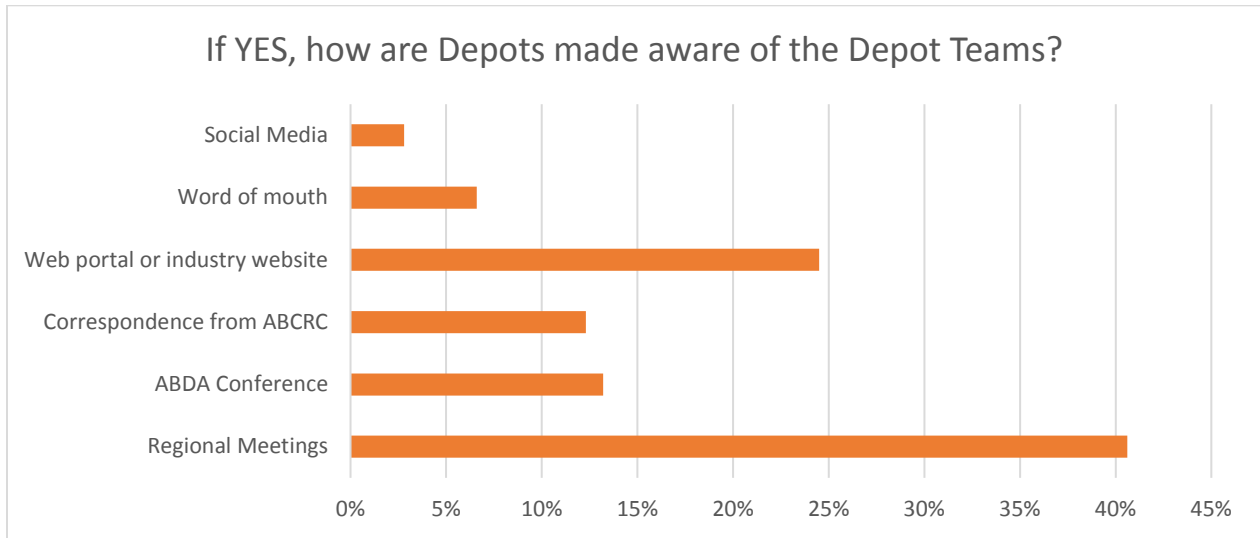
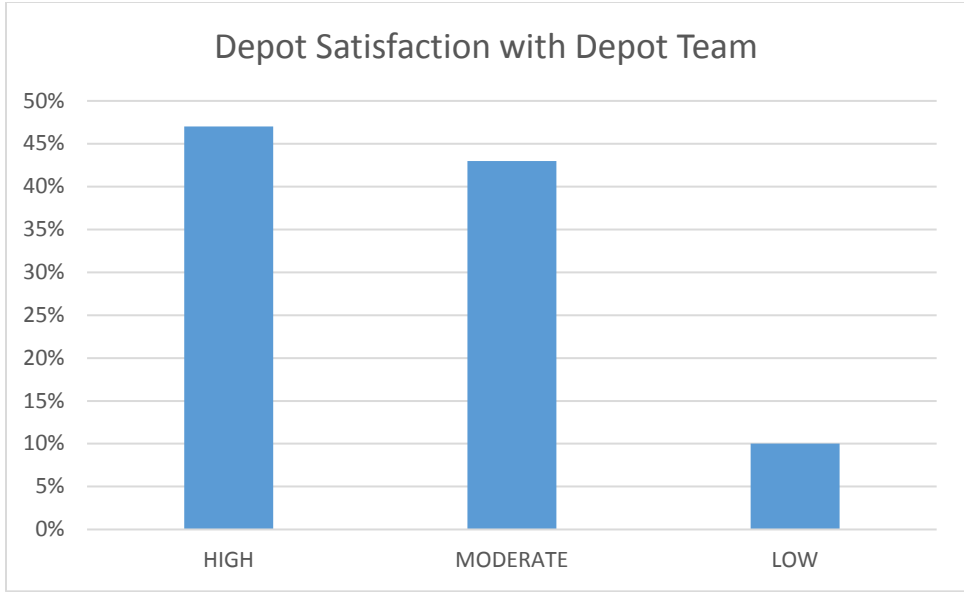
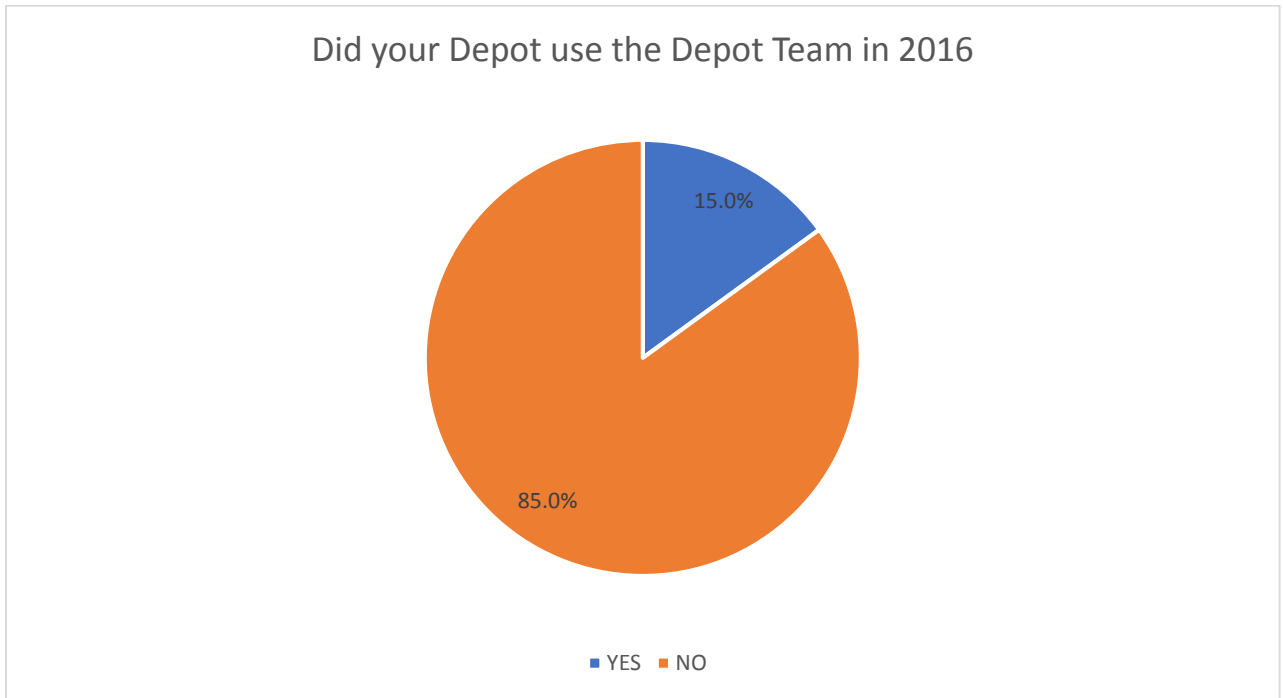


Chart 15
(2016)



*Chart 16
(2016)*



*Chart 17
(2016)*

Depot Awareness of ABCRC's Community Champions Program (CCP)

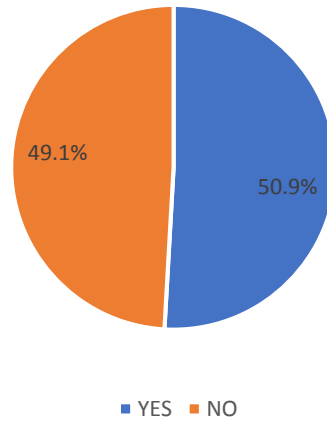


Chart 18
(2016)

if YES, how are Depots made aware of the CCP?

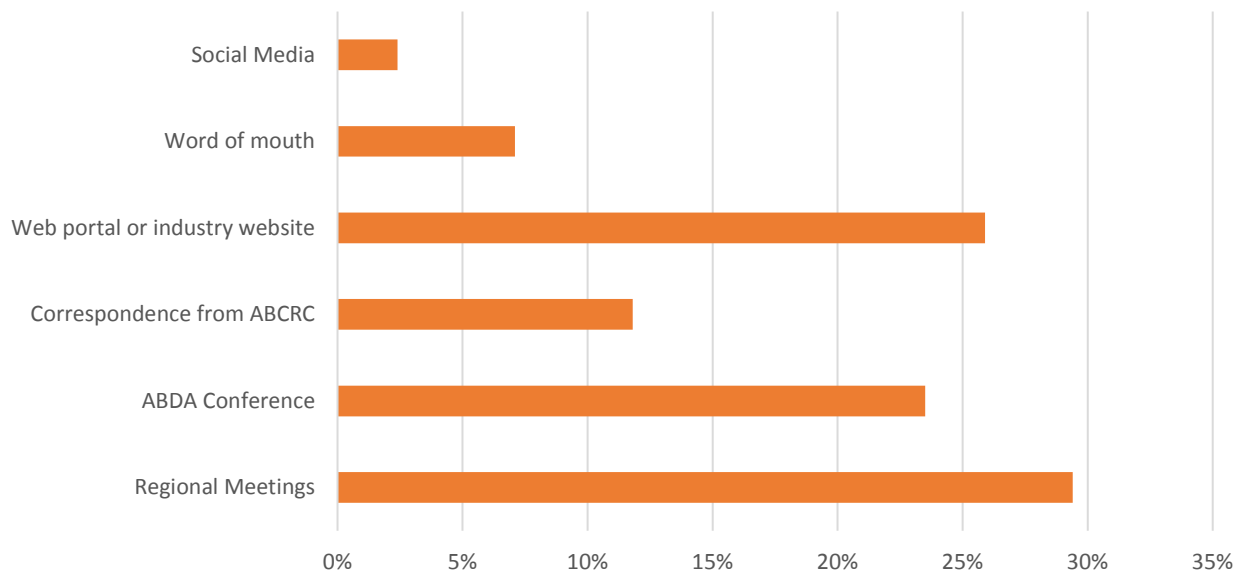


Chart 19
(2016)

Would Depots like more Information on CCP?

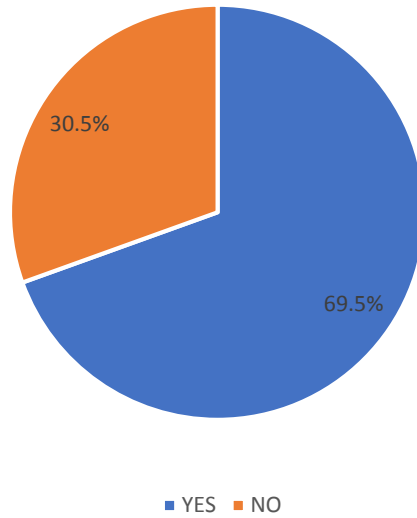


Chart 20
(2016)

Are Depots aware of any Community Partners in their Community who submitted in 2016

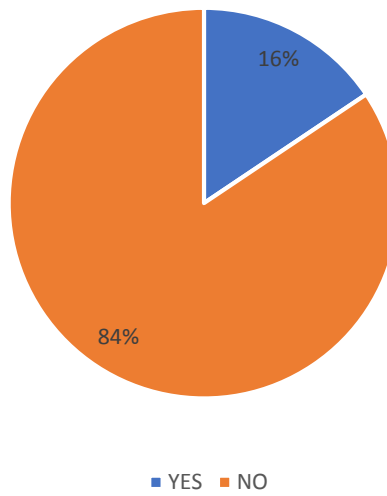


Chart 21
(2016)

BCMB Analysis

1. Satisfaction by Service Requirement in 2016

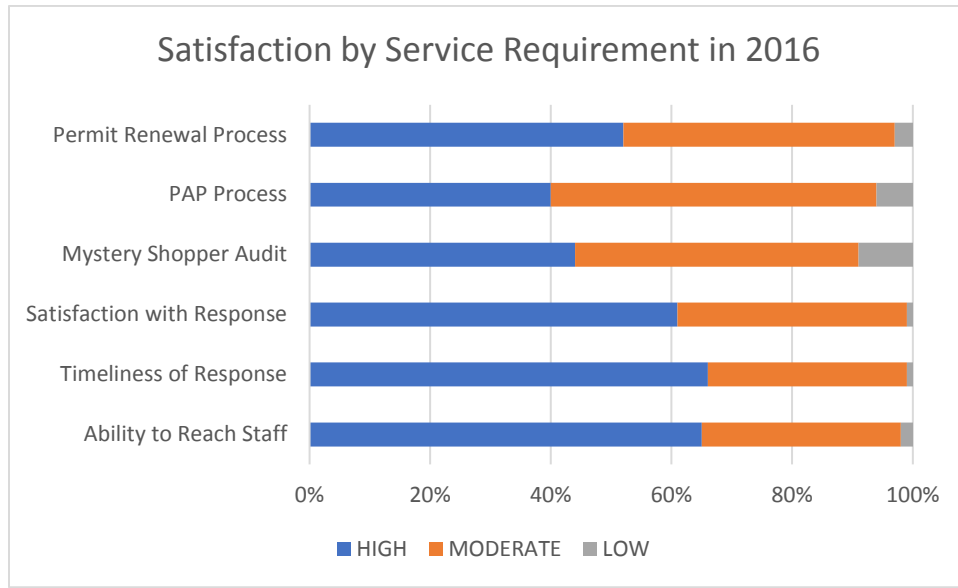


Chart 22
(2016)

Depots rated the questions on a scale of 1-7.

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A rating of 4 or 5 = moderately satisfied "MODERATE"

A rating of 1, 2 or 3 = not satisfied "LOW"

2. Satisfaction with Key Service Indicators for BCMB

Ability to contact and reach the staff at the BCMB

There has been a general improvement in this item Year over Year. A significant increase in Depot's scoring 'HIGH' and a decrease in scoring 'LOW' is indicative of improved BCMB communication in 2016.

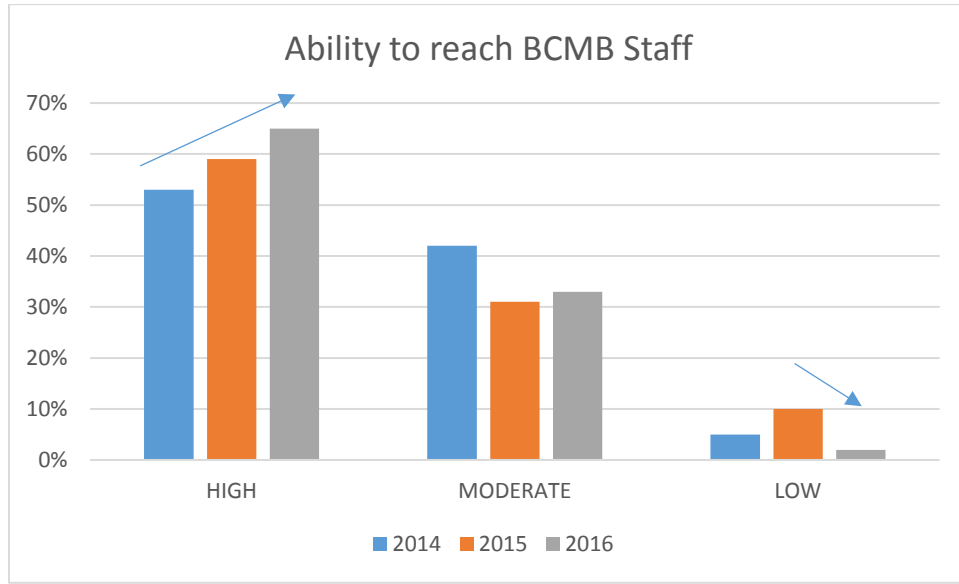


Chart 23
3 Years (2014,2015,2016)

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How quickly the BCMB responds when a request is made

Along with improved ability to contact the BCMB there has been a marked improvement in how quickly the BCMB is perceived to respond to requests.

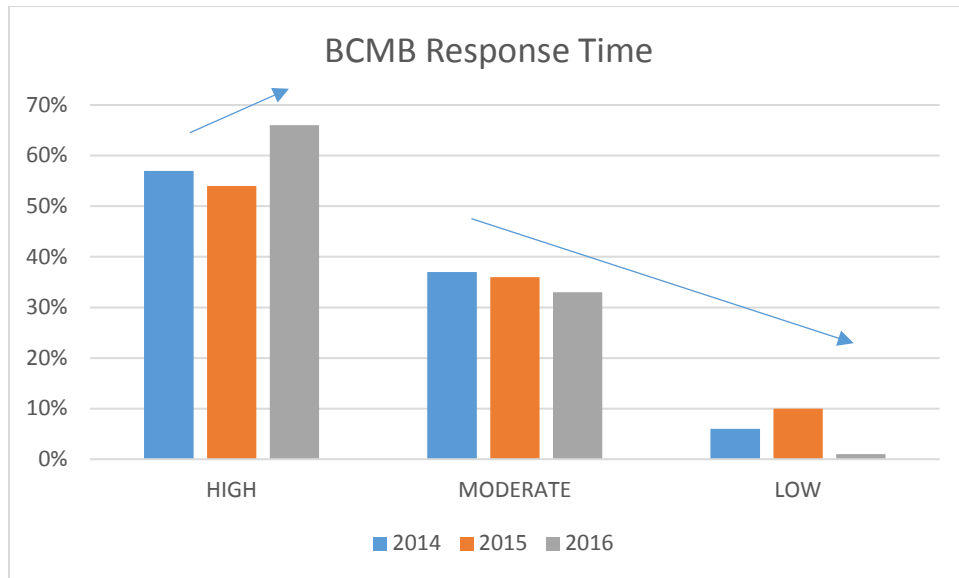


Chart 24
3 Years (2014,2015,2016)

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Receipt of Refund Compliance (Mystery Shopper) Results

2016 responses saw a shift of responses moving from 'HIGH' to 'MODERATE' indicating a decrease in satisfaction. This item is related to the timeliness and receipt of Mystery Shopper Audits

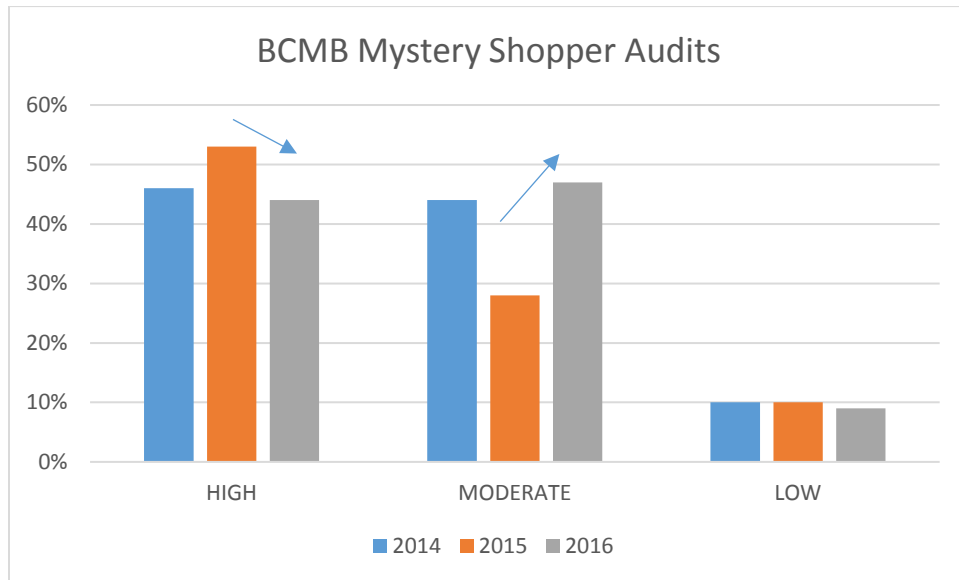


Chart 25
3 Years (2014,2015,2016)

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A rating of 1, 2 or 3 = not satisfied "LOW"

Progressive Action Policy Process

'HIGH' satisfaction associated with PAP process has remained relatively constant at ~40% for the last 3 years. 2016 saw an increase in those moderately satisfied with a decrease in those reporting "LOW" satisfaction.

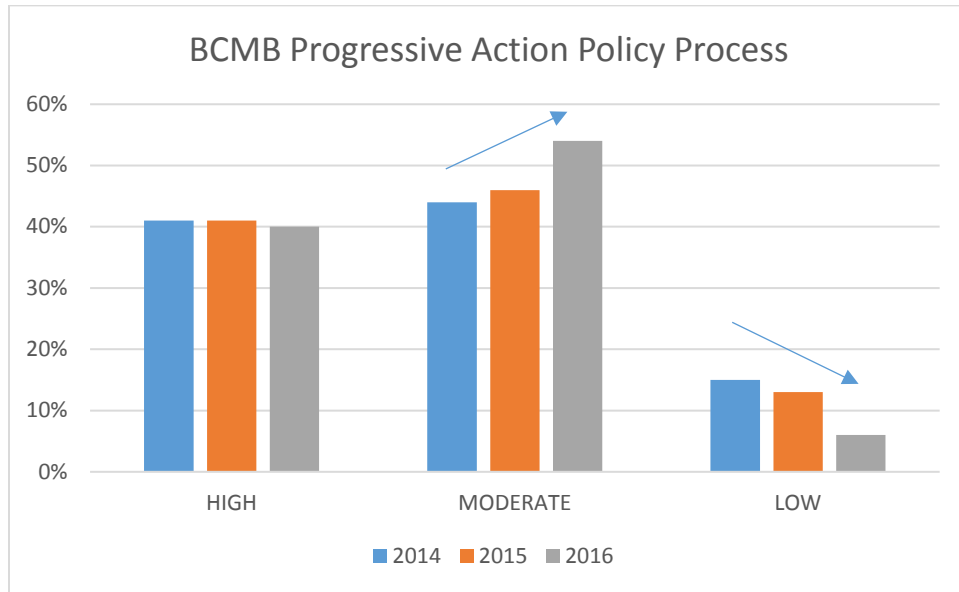


Chart 26
3 Years (2014,2015,2016)

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A rating of 4 or 5 = moderately satisfied "MODERATE"

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Permit Renewal Process

Those depots highly satisfied in 2016 remained consistent with the previous year and there has been a positive shift from 'LOW' satisfaction to 'MODERATE'.

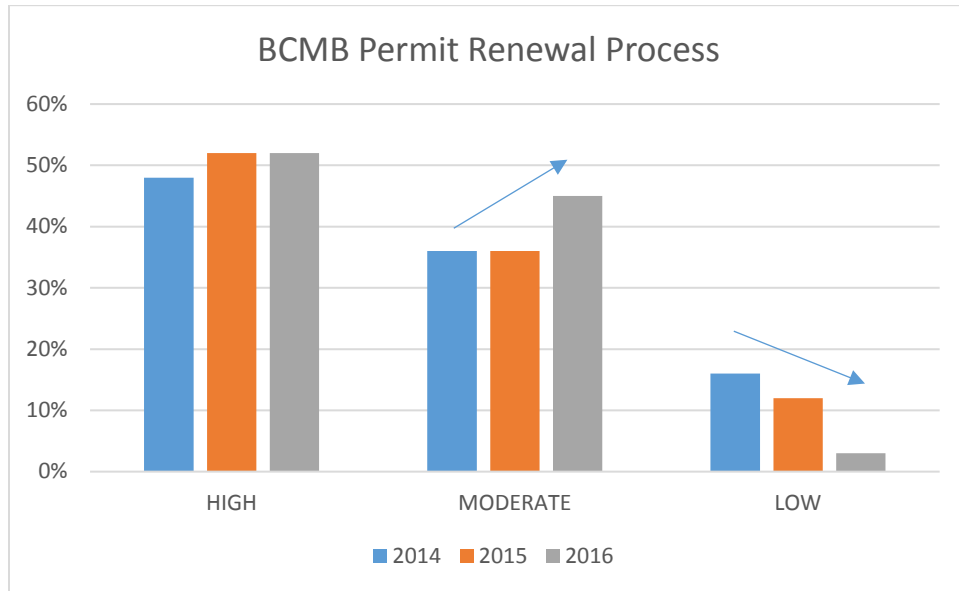


Chart 27
3 Years (2014,2015,2016)

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BDL Analysis

1. Satisfaction by Service Requirement in 2016

This is the second year that Depots were polled on BDL performance allowing for the first set of comparison data in 2016.

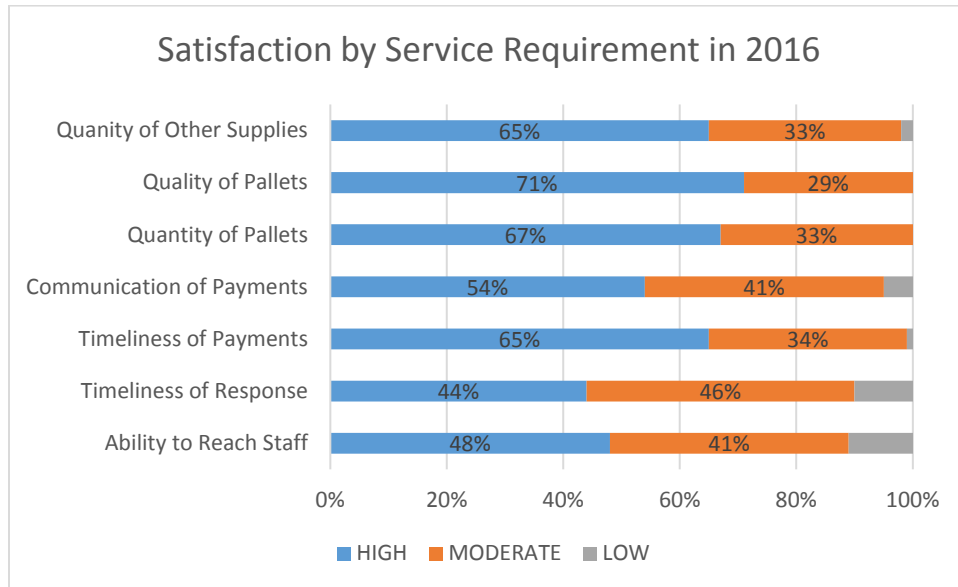


Chart 28
(2016)

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2. Satisfaction with Key Service Indicators for BDL

Ability to contact and reach the staff at BDL

Decreases in both 'HIGH' and 'LOW' satisfaction were noted from 2015 results. More depots are now moderately satisfied with their ability to contact BDL staff.

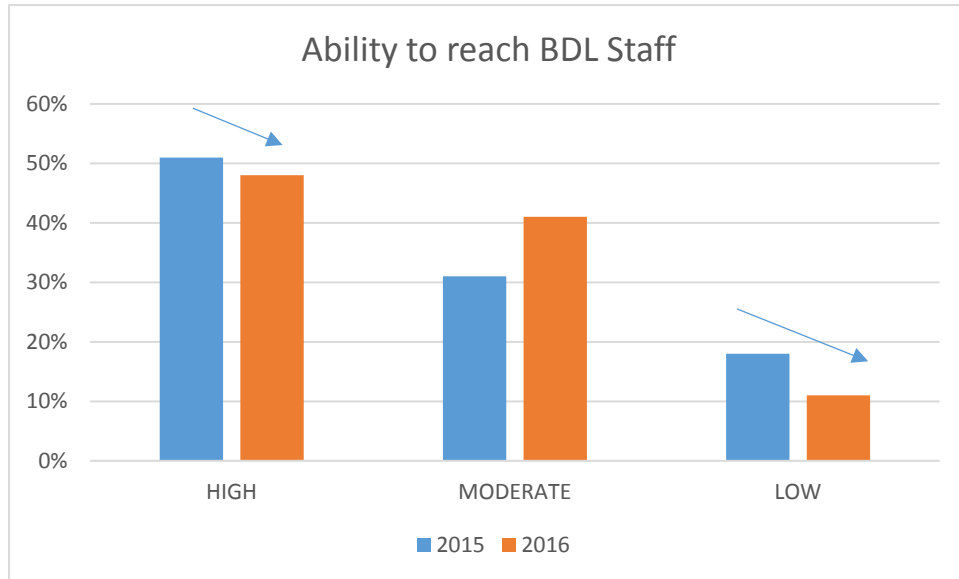


Chart 29
2 Years (2015,2016)

Depots rated the questions on a scale of 1-7.

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A rating of 1, 2 or 3 = not satisfied "LOW"

How quickly BDL responds when a request is made

Results are similar to the previous category. A decrease in 'HIGH' satisfaction is noted.

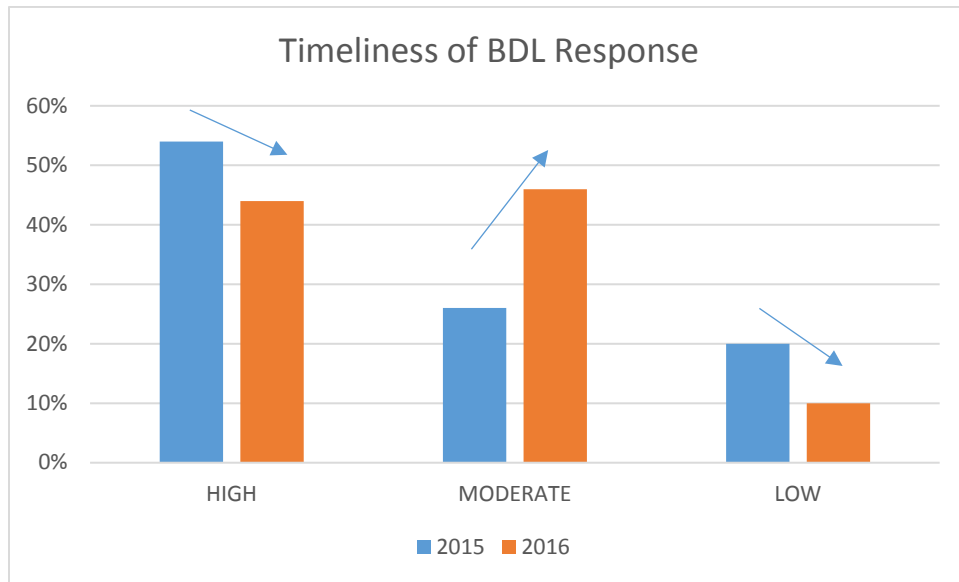


Chart 30
2 Years (2015,2016)

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Timeliness of Payments Received from BDL

Results in the 'HIGH' area of this category are consistent with 2015. There has been a significant reduction in those depots indicating a 'LOW' satisfaction with payment timelines.

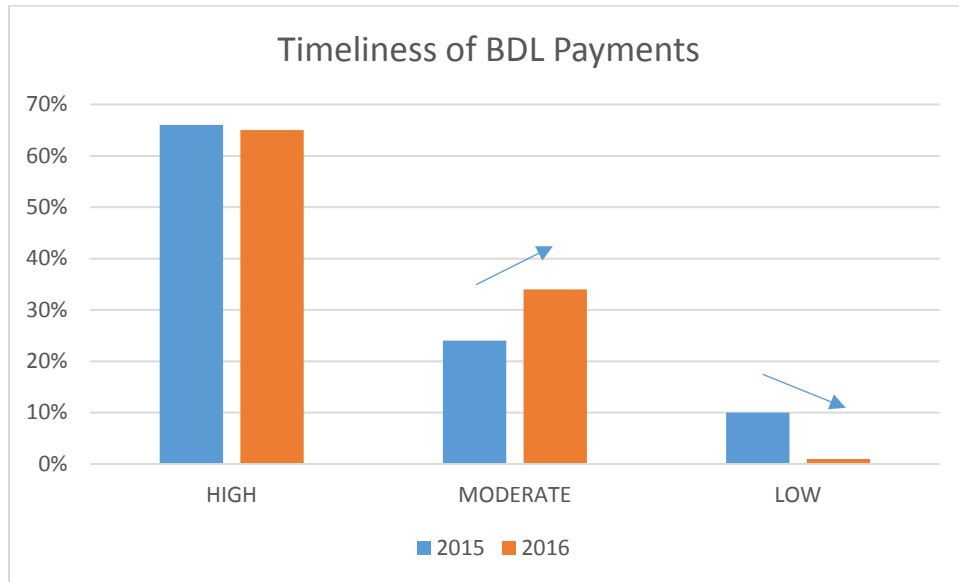


Chart 31
2 Years (2015,2016)

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Timeliness of Payment Adjustment

A significant increase is seen in 'MODERATE' satisfaction with drops in both 'HIGH' and 'LOW' categories.

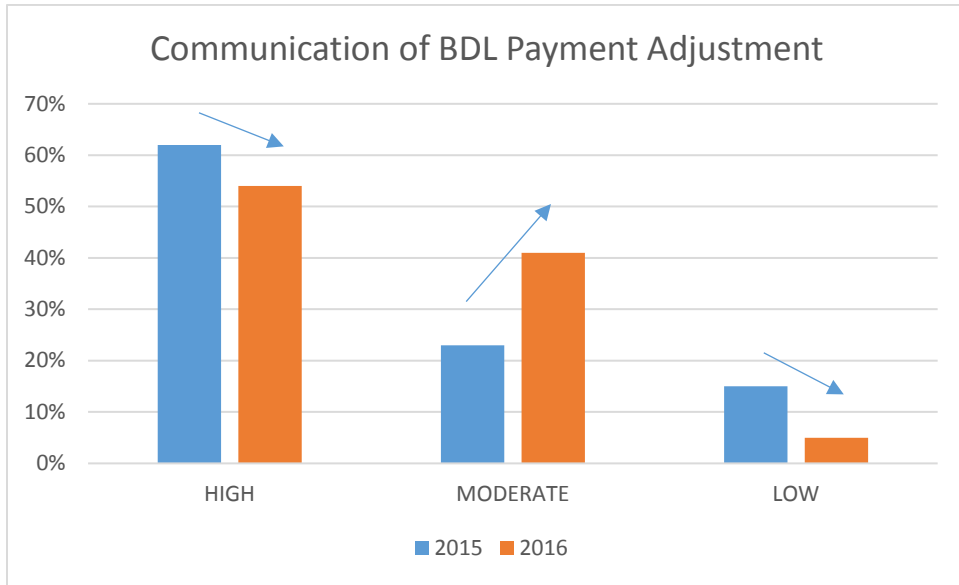


Chart 32
2 Years (2015,2016)

Depots rated the questions on a scale of 1-7.

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A rating of 1, 2 or 3 = not satisfied "LOW"

Quantity of Pallets from BDL

Results in the 'HIGH' area of this category are consistent with 2015. There has been a significant reduction in those depots indicating a 'LOW' satisfaction with Pallet Quantity.

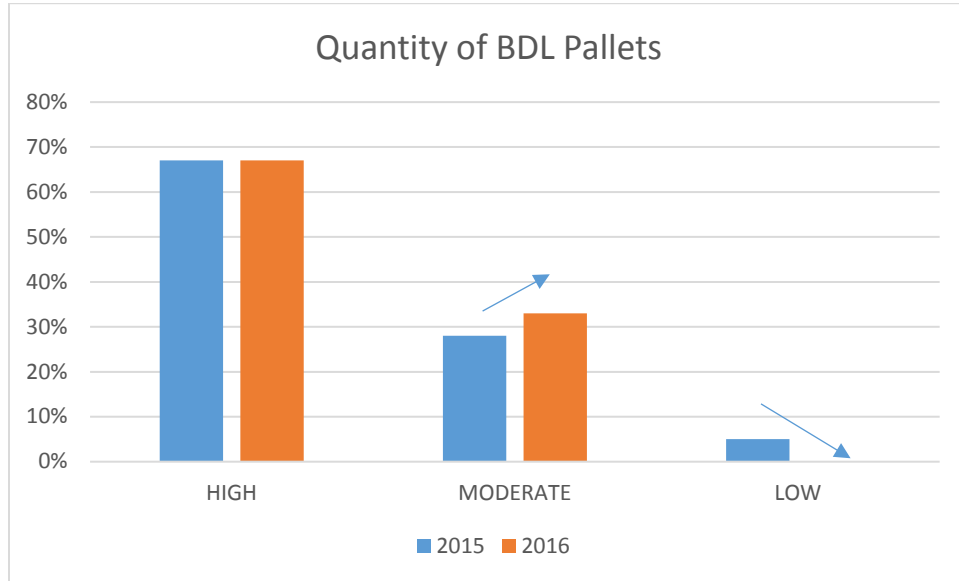


Chart 33
2 Years (2015,2016)

Depots rated the questions on a scale of 1-7.

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A rating of 1, 2 or 3 = not satisfied "LOW"

Quality of Pallets from BDL

The results in this category are broadly similar to those seen in 'quantity of pallets'. No depot recorded a 'LOW' score for BDL pallet quality.

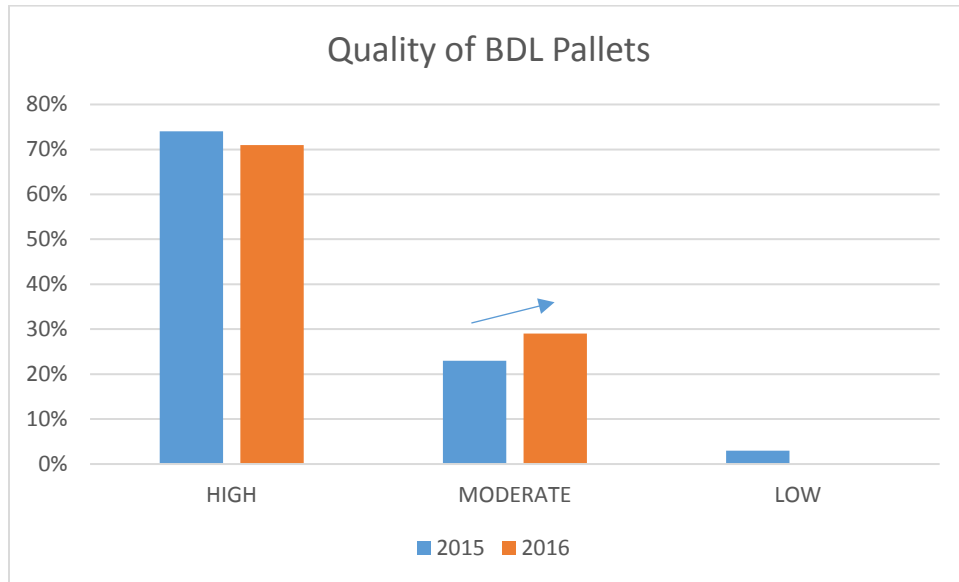


Chart 33
2 Years (2015,2016)

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Other Supplies

Small changes are noted in each satisfaction area. Low satisfaction dropped from 6% to 2% from 2015.

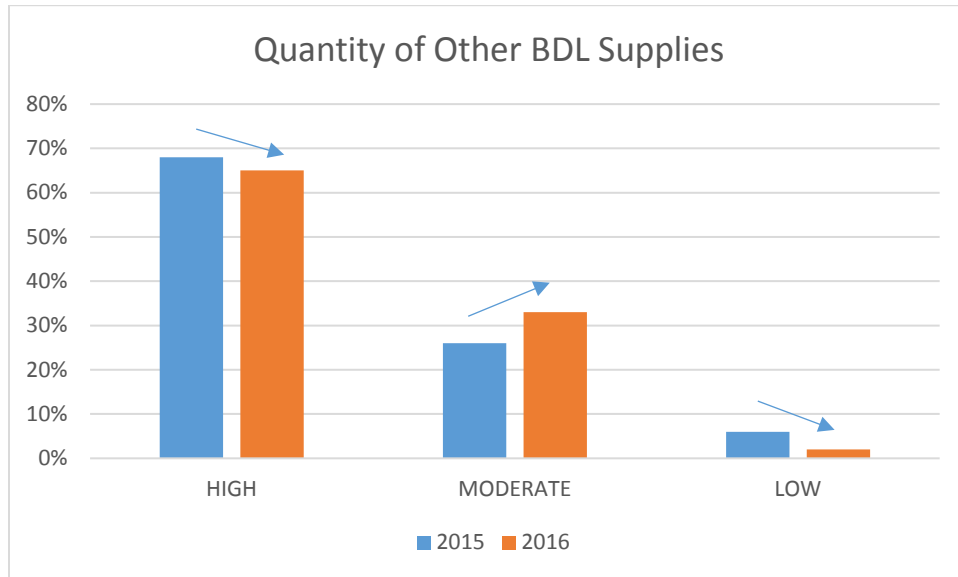


Chart 34
2 Years (2015,2016)

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Quality Monitoring

In 2016 there were 3 direct questions asked relating to QM. Focus was adjusted to evaluate Depot engagement with the QM tool when they indicated a low satisfaction rating.

Results showed that there was a greater inclination to use QM for supply related issues. However, in the areas of carrier service and communication nearly 50% of the depots who had concerns did not proceed further on the matter through QM.

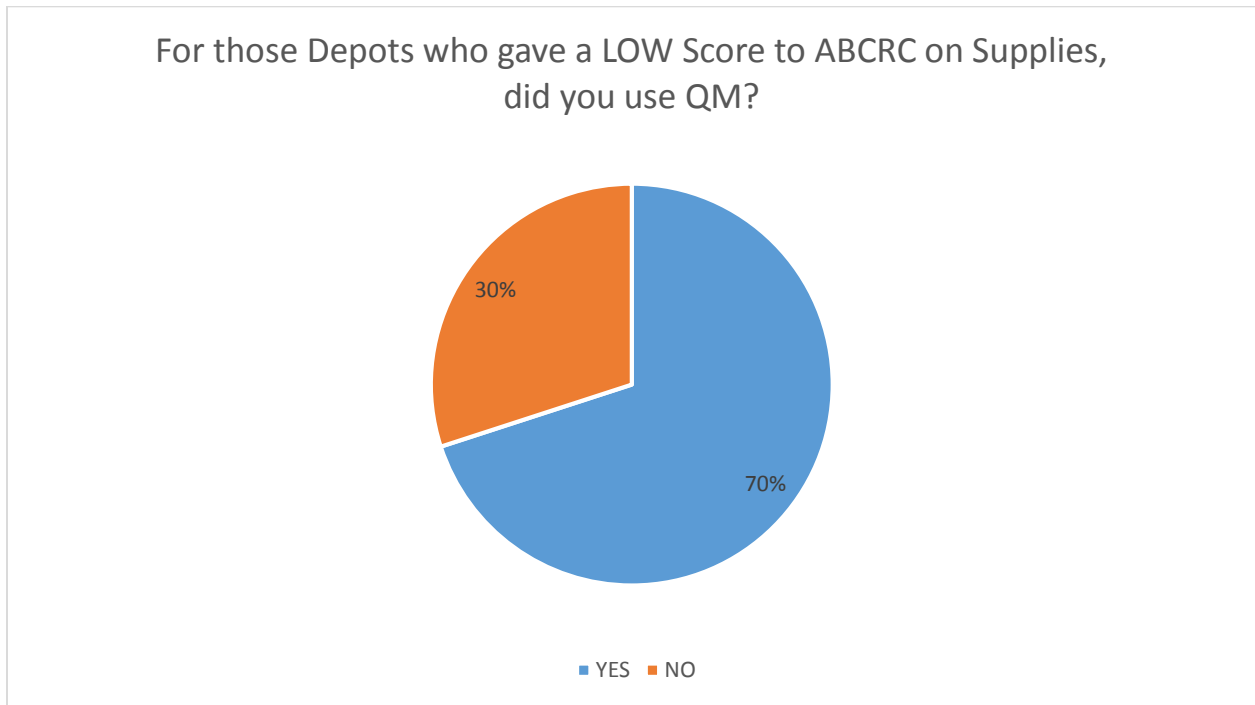


Chart 35
(2016)

For those Depots who gave a LOW Score to ABCRC on Carrier Satisfaction, did you use QM?

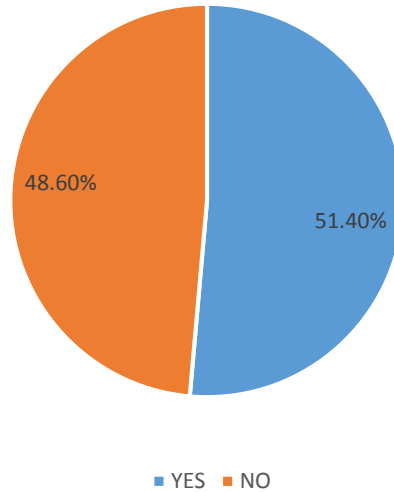


Chart 36
(2016)

If you gave BDL a LOW Score for Communication did you use QM?

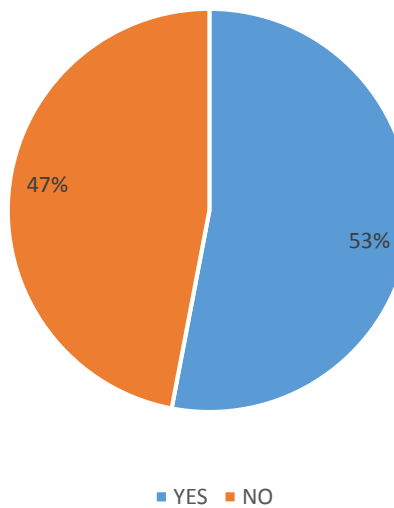


Chart 37
(2016)

Action Plans

At the 2016 Regional Meetings ABCRC, BDL and BCMB provided action plans as a response to the results from the 2015 Survey. Similar results were seen for all three organizations.

A Summary of the Plans presented by each organization at the 2016 Regional Meetings were as follows:

BCMB

1. Timeliness of Mystery Shopper Audits (Depots up to 19% more dissatisfied)
 - a. BCMB to implement 7-day turnaround plan
2. Timeliness of PAP Audit Results (Depots up to 13% more dissatisfied)
 - a. BCMB to review PAP Policy
 - b. BCMB to monitor and track timelines for review in 2017
 - c. BCMB to provide feedback to ABCRC on timelines
3. Discomfort in using CVR (17% reported not comfortable using)
 - a. BCMB to educate Depot operators on usage and importance of form via e-learning tool

ABCRC

1. Communications (Response Times dissatisfaction increased by 11%)
 - a. "BCMB to issue transactional issue document to ABCRC"
 - b. ABCRC to develop SOP for proper timelines
2. Shipping Containers (Quantity and Quality) - Discussion
3. Depot Marketplace – Review

BDL

1. Ability to reach staff/timeliness of response - Review
2. Timeliness of Payments received - Review
3. Pallets (Quantity and Quality) - Review

Survey Feedback to 2016 Action Plans

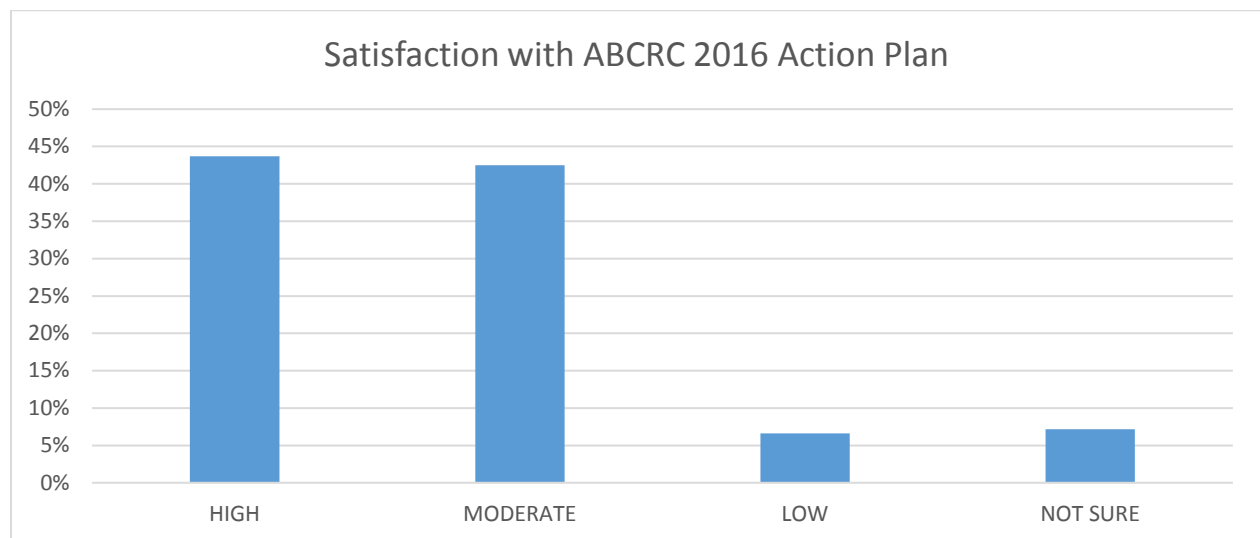


Chart 38
(2016)

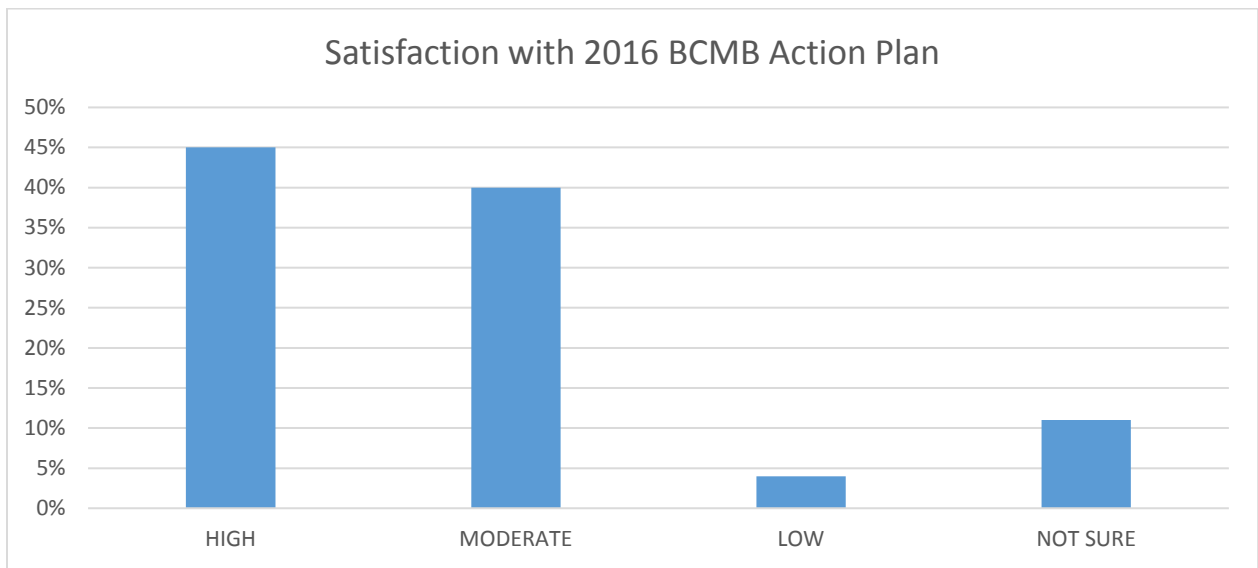


Chart 39
(2016)

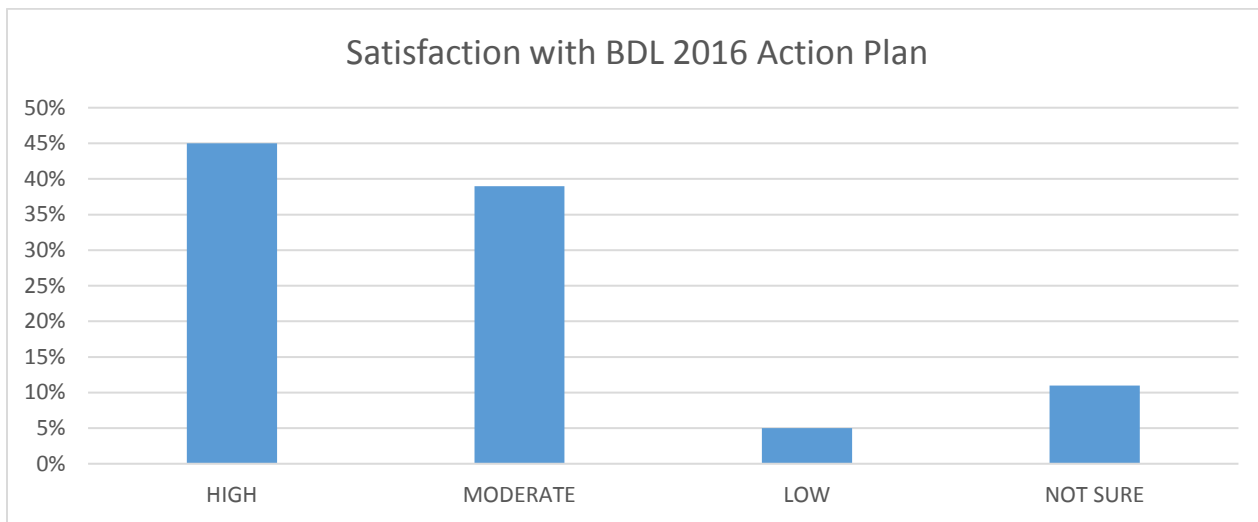


Chart 40
(2016)

Depots rated the questions on a scale of 1-7.

A rating of 6 or 7 = highly satisfied "HIGH"

A rating of 4 or 5 = moderately satisfied "MODERATE"

A rating of 1, 2 or 3 = not satisfied "LOW"