

Depot Satisfaction Survey

2019



Beverage Container Management Board

SURVEYS COMPLETED OCTOBER 2019

REPORT PREPARED JANUARY 2020

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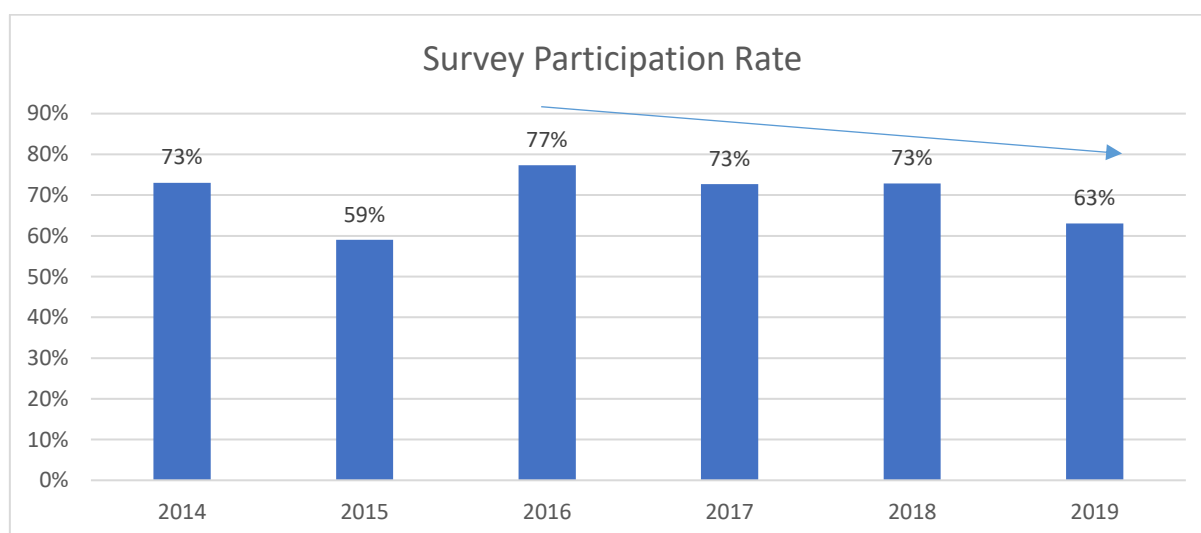
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Background and Methodology

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

In October 2019, the BCMB conducted the annual Depot Satisfaction Survey for the sixth year in a row. The survey has been conducted annually to evaluate industry partners on a fiscal year cycle. 2019 marks the third year that ABDA has been included in the survey. Depot operators were asked to complete the survey via web survey (Survey Monkey) during the month of October. In October 2019 the Alberta depot network consisted of 219 universal bottle depots. Of those 219 depots, 137 depot operators completed the 2019 Depot Satisfaction Survey resulting in a 63% completion rate. The decreased participation rate in 2019 as compared to the last 3 years (2016 – 2018) can be attributed to BCMB not having the survey available for completion at the October 2019 ABDA Conference.

Chart 1: Survey Participation Rate



Survey Terminology

The 2019 Depot Satisfaction Survey utilizes 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

There was a positive trend in satisfaction across all industry partners for 2019. Nearly every area for each industry partner showed improvement in satisfaction from the depot network.

Notable areas to highlight in the report include the following:

ABCRC

a. Overall Satisfaction: Depots' overall satisfaction with ABCRC has increased from a HIGH satisfaction of 43% in 2018 to 64% in 2019, an increase of 21% (**Chart 2**). Additionally, the majority of ABCRC's service requirements have the highest satisfaction rate since this survey's inception.

b. Mega Bags: Notably, HIGH satisfaction with the quantity of mega bags from ABCRC has significantly increased from 45% in 2018 to 62% in 2019 (an increase of 17%), with LOW satisfaction in this area dropping from 17% in 2018 to 7% in 2019 (a decrease of 10%) (**Chart 8**).

c. Communication: Depots' ability to contact staff at ABCRC (74% 'HIGH' satisfaction) and the timeliness of ABCRC's responses to Depots' requests (76% 'HIGH' satisfaction) have both seen significant increases in HIGH satisfaction in 2019 as compared to 2018 (**Charts 4, 5**).

BCMB

e. Communication: Satisfaction with communication (both the ability to contact BCMB staff and the timeliness of communication from BCMB staff) has improved from 2018 with 'HIGH' satisfaction now at 72% in both categories as compared to 2018's 67% in both categories (**Charts 13, 14**).

f. QC Compliance Communication: Satisfaction with QC Compliance communication is at an all time high in 2019 with 'HIGH' satisfaction at 69% (as compared to 58% in 2018) (**Chart 16**).

g. Implementation of New By-Laws: 2019's survey introduced the measurement of satisfaction with the implementation of BCMB's new by-Laws and compliance frameworks. Satisfaction with the implementation of the BCMB's by-Laws and frameworks is on of the highest satisfaction areas for the BCMB with 'HIGH' satisfaction at 70% (**Chart 18**).

BDL

i. Communication: Overall satisfaction in the Depot networks ability to reach BDL and the timeliness of their response improved significantly from the previous years. This includes the following areas: ability to contact staff (57% 'HIGH' satisfaction), timeliness of communication (54% 'HIGH' satisfaction), and communication of payment adjustments (64% 'HIGH' satisfaction) (**Charts 20, 21, 23**).

j. Timeliness of Payments: 2019 saw highest 'HIGH' satisfaction in this question's history at 72% (**Chart 22**).

ABDA

k. Overall Satisfaction: This is the third year the survey has assessed the ABDA and the results show that overall satisfaction increased significantly from both 2017 (69% 'HIGH' satisfaction) and 2018 (61% 'HIGH' satisfaction) to 76% 'HIGH' satisfaction in 2019 (**Chart 27**).

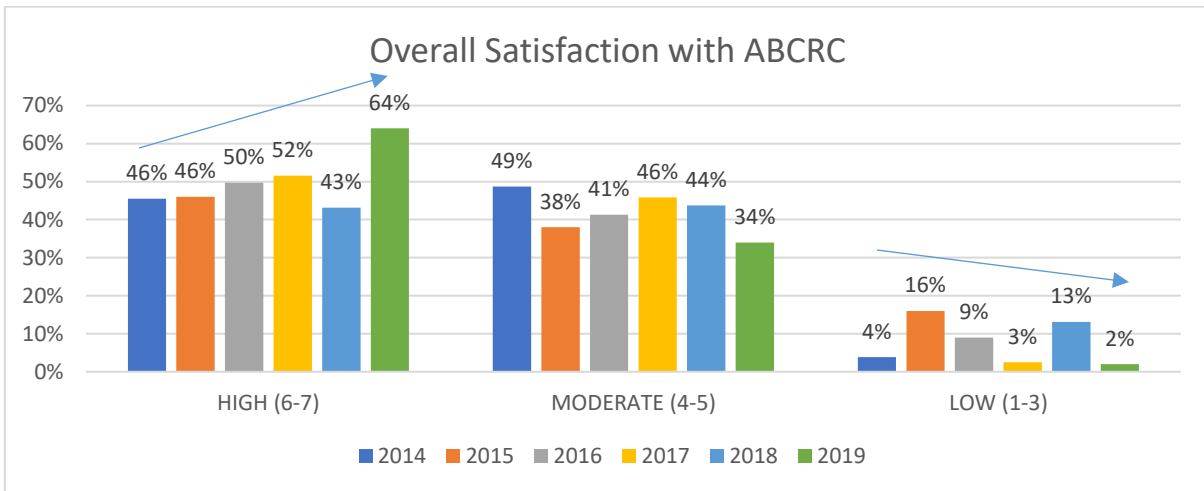
l. Communication: Feedback on the ability to reach the ABDA (78% 'HIGH') and their response time (76% 'HIGH') was positive with an additional 'HIGH' satisfaction in the ability for ABDA to effectively handle a concern (76% 'HIGH') (**Chart 28**).

ABCRC Analysis

Overall Satisfaction with ABCRC

The 2019 survey showed an increase in overall satisfaction with a significant decrease in depots scoring 'LOW' satisfaction.

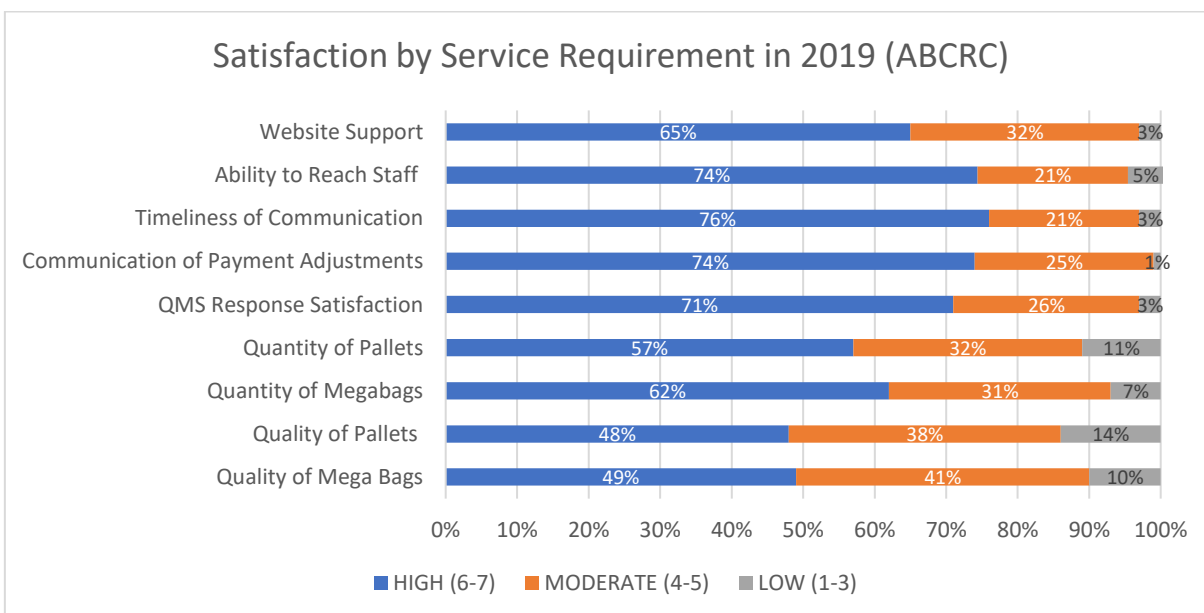
Chart 2: Overall Satisfaction with ABCRC



Satisfaction by Service Requirement in 2019

The following graph displays a breakdown of all service requirements provided by ABCRC. QMS Response Satisfaction was new in 2018 and replaced the 'Website support services' category.

Chart 3: Satisfaction by Service Requirement in 2019 (ABCRC)

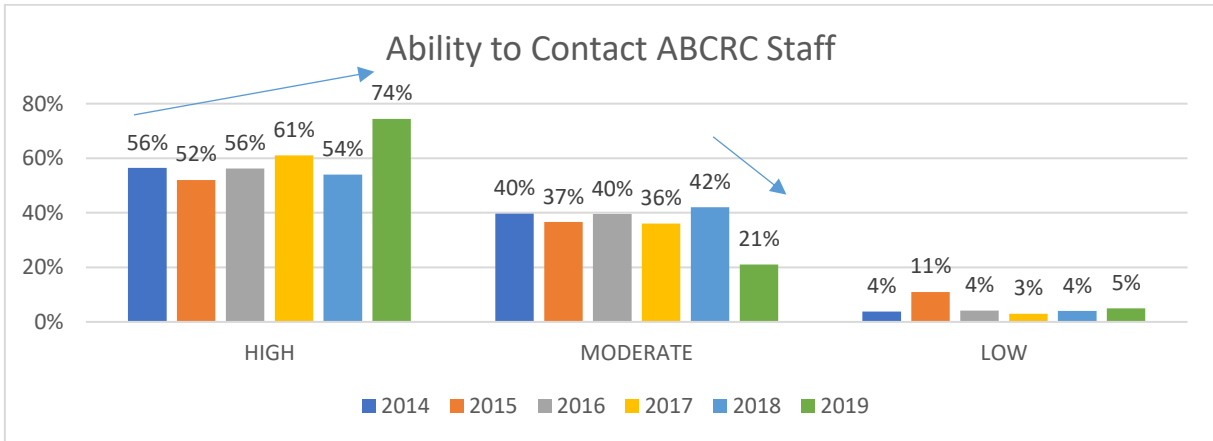


Satisfaction with Key Service Indicators for ABCRC

Ability to Contact ABCRC Staff

Scoring for 2019 saw a shift from 'MODERATE' to 'HIGH'. "LOW" scores remained static.

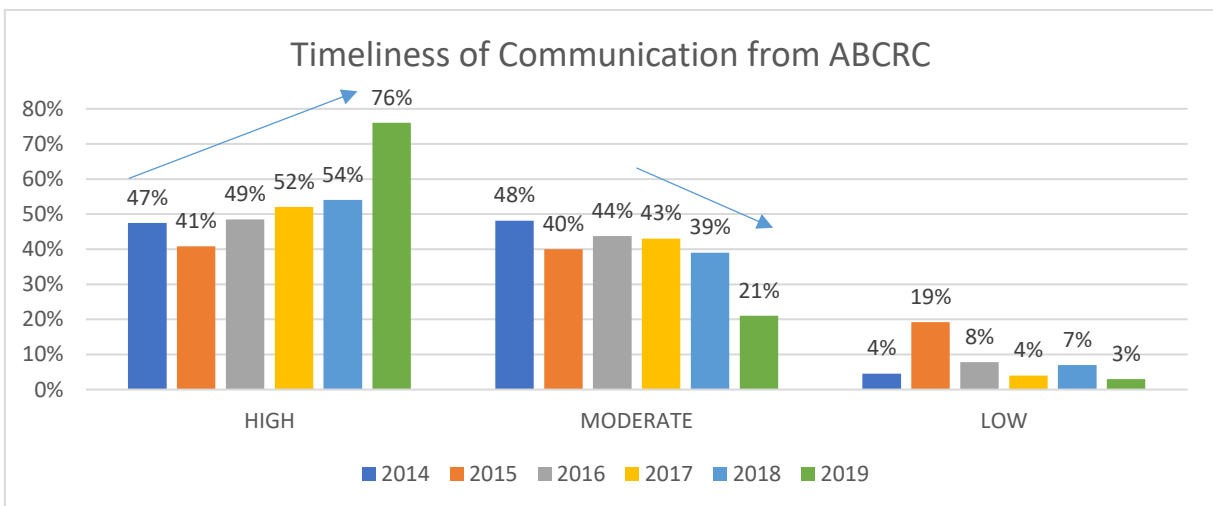
Chart 4: Ability to Contact ABCRC Staff



Timeliness of ABCRC Response to Requests

A significant increase in 'HIGH' satisfaction was noted for 2019. This area has improved steadily, with 2019 showing a large jump in satisfaction, reducing both the 'MODERATE' and 'LOW' scores.

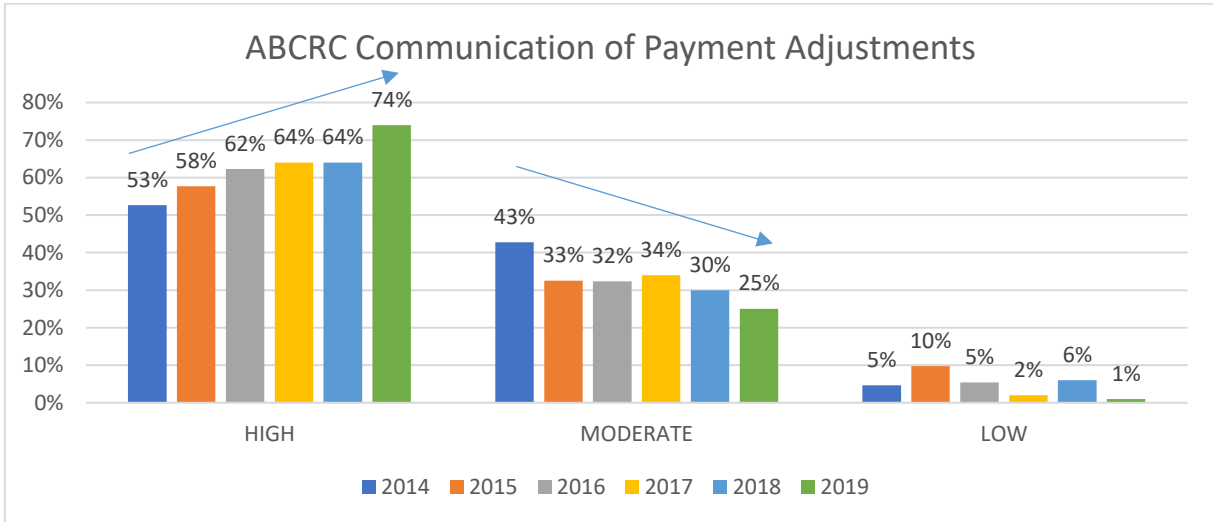
Chart 5: Timeliness of Communication from ABCRC



Communication of Payment Adjustments

Continued improvement is noted for 2019, with 'LOW' satisfaction at just 1%.

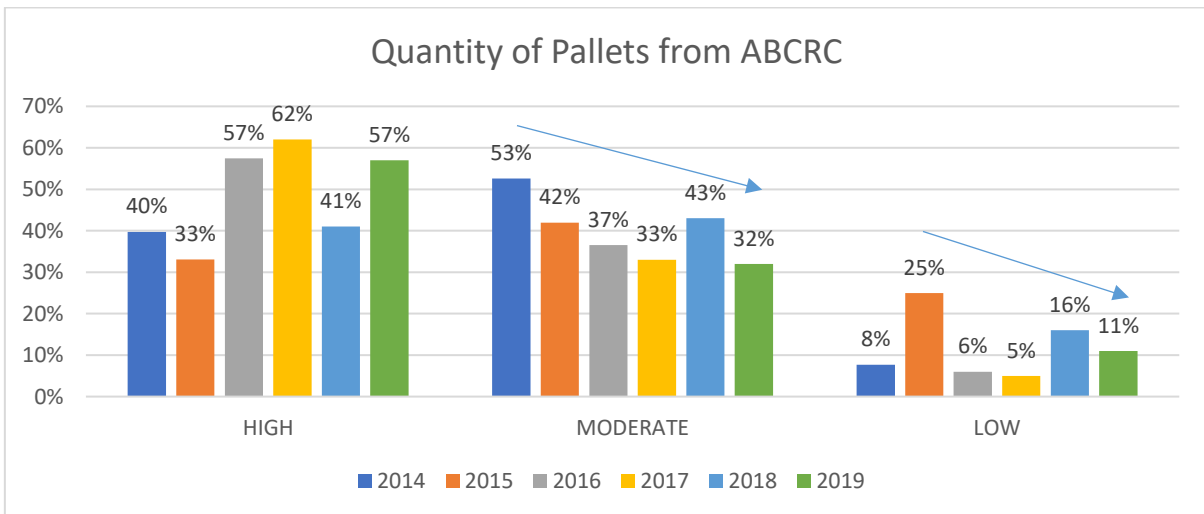
Chart 6: ABCRC Communication of Payment Adjustments



Quantity of Pallets from ABCRC

2019 saw a return to scores similar to those seen in 2016 and 2017, proving 2018's scores to be anomalous.

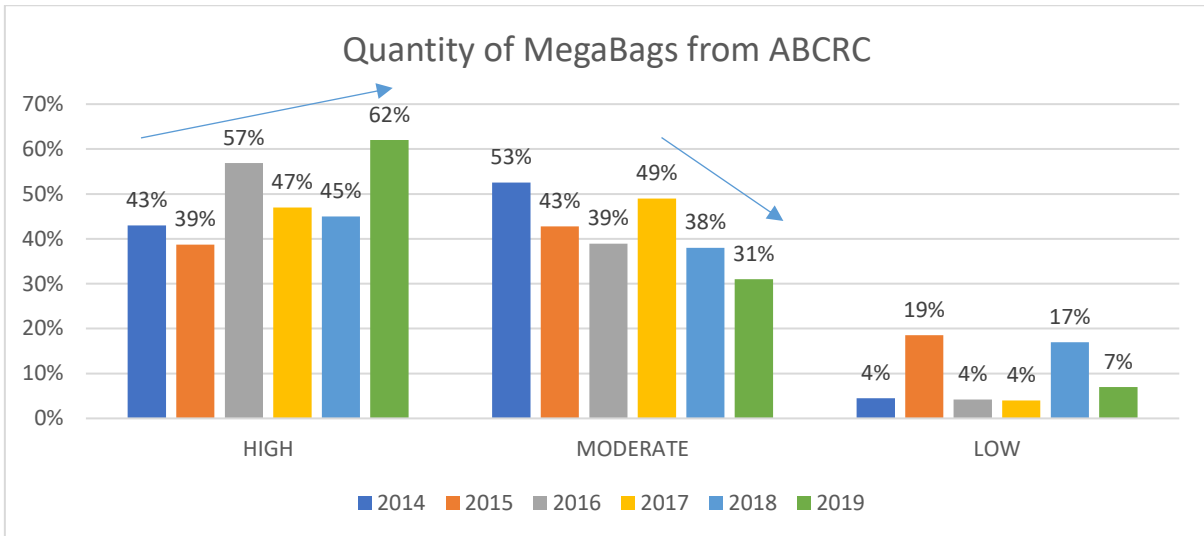
Chart 7: Quantity of Pallets from ABCRC



Quantity of Mega Bags from ABCRC

Mega Bag quantity saw a return to 'HIGH' satisfaction in 2019 and a significant decrease in both 'MODERATE' and 'LOW' satisfaction from the previous year.

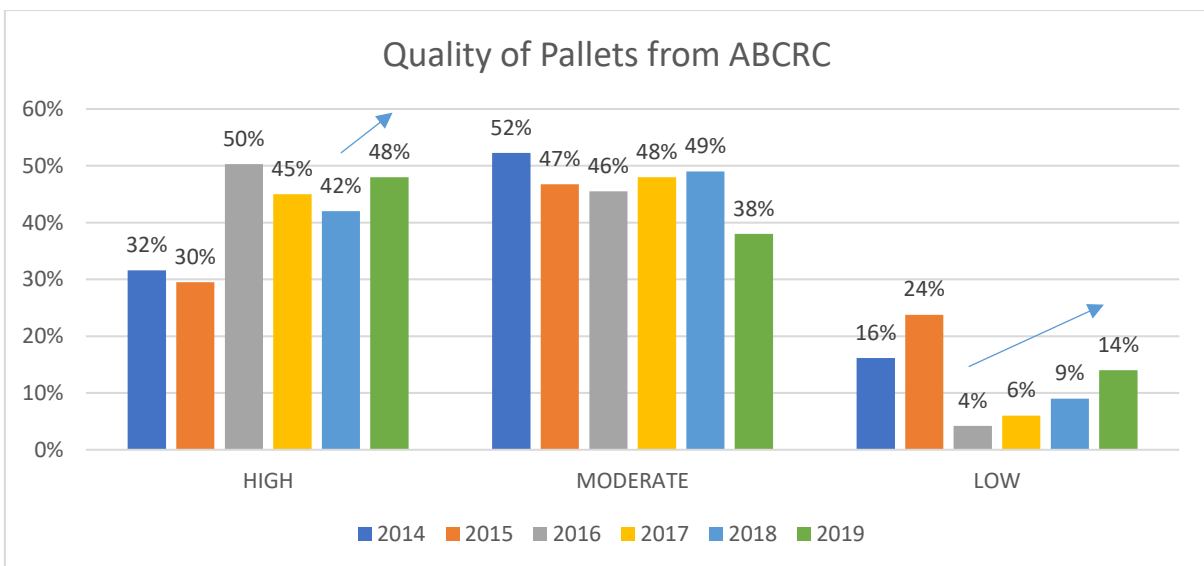
Chart 8: Quantity of Mega Bags from ABCRC



Quality of Pallets from ABCRC

Though 'HIGH' satisfaction has increased in 2019, the trend of 'LOW' satisfaction increasing has continued.

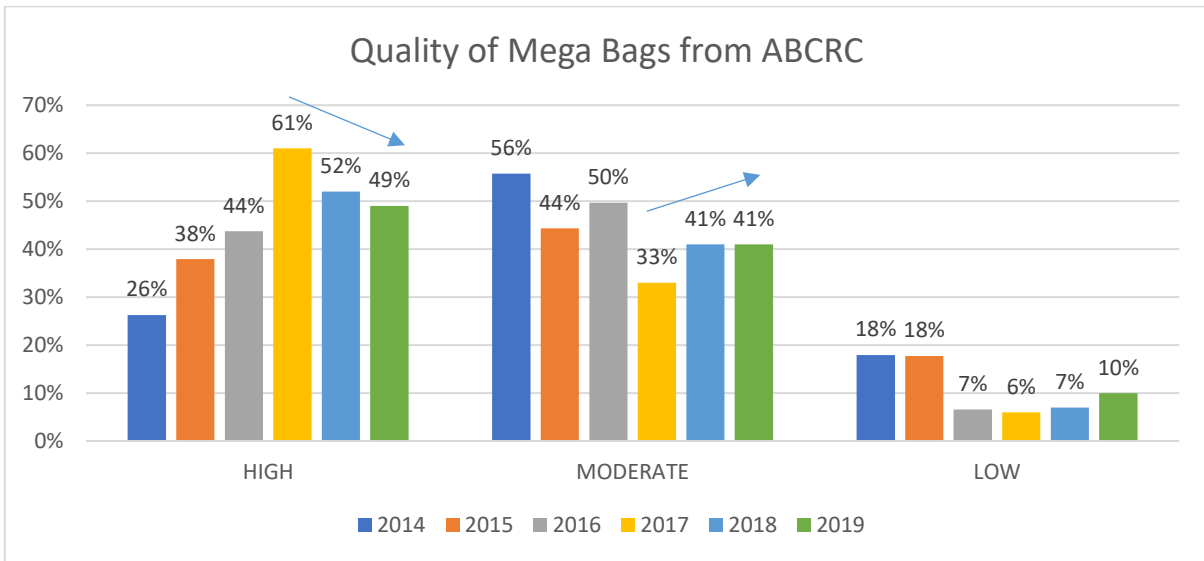
Chart 9: Quality of Pallets from ABCRC



Quality of Mega Bags from ABCRC

The quality of mega bags is one of the only areas in 2019 that saw a decrease in 'HIGH' satisfaction.

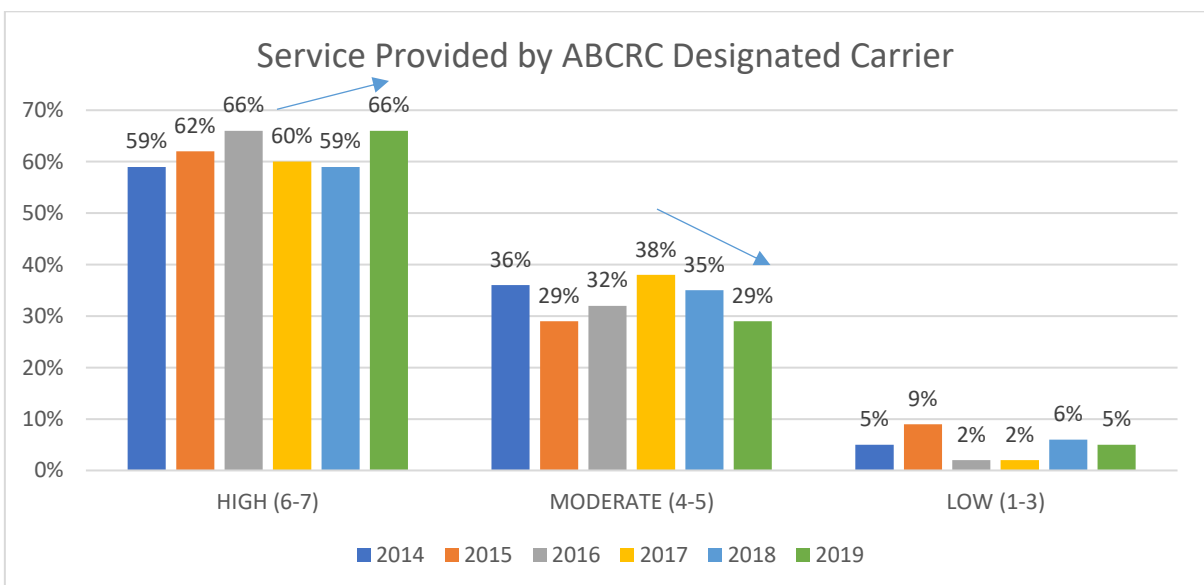
Chart 10: Quality of Mega Bags from ABCRC



Service Provided by ABCRC Designated Carrier

'HIGH' satisfaction with ABCRC Carrier service has increased since the last survey, decreasing both 'MODERATE' and 'LOW' scores.

Chart 11: Service Provided by ABCRC Designated Carrier

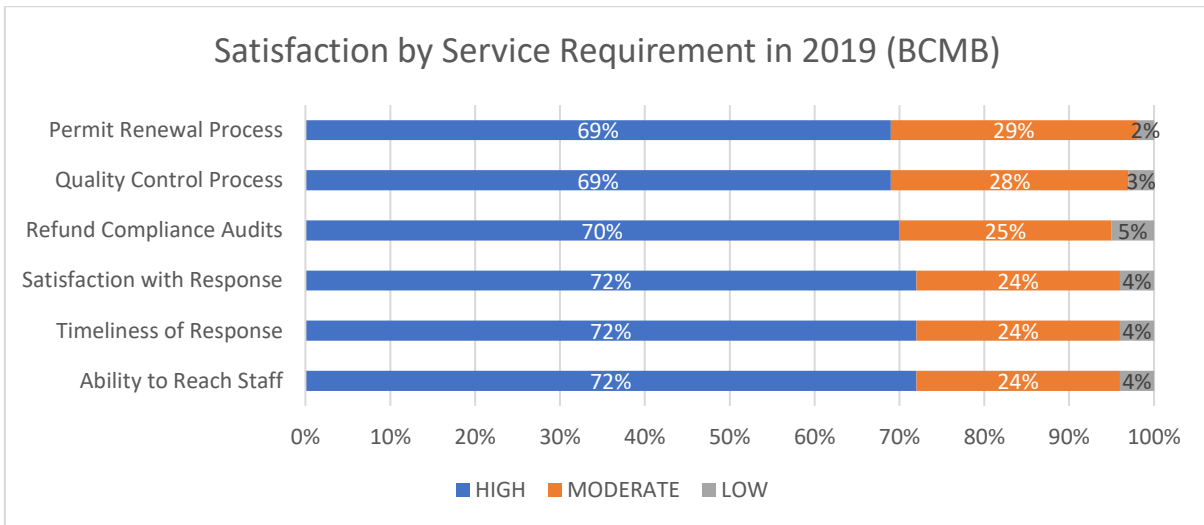


BCMB Analysis

Satisfaction by Service Requirement in 2019

The BCMB continues to be consistent in 'HIGH' feedback for the ability to reach staff and get quick responses to questions. Trending improvement in administrative processes continues into 2019.

Chart 12: Satisfaction by Service Requirement in 2019 (BCMB)

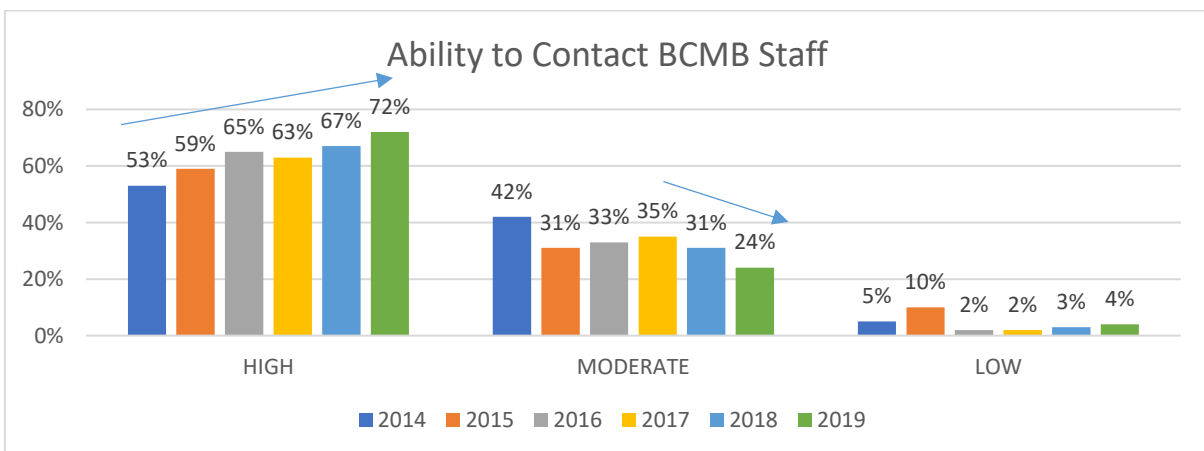


Satisfaction with Key Service Indicators for BCMB

Ability to Contact BCMB Staff

An increase in 'HIGH' satisfaction is noted in 2019 with "MODERATE" decreasing and 'LOW' increasing slightly.

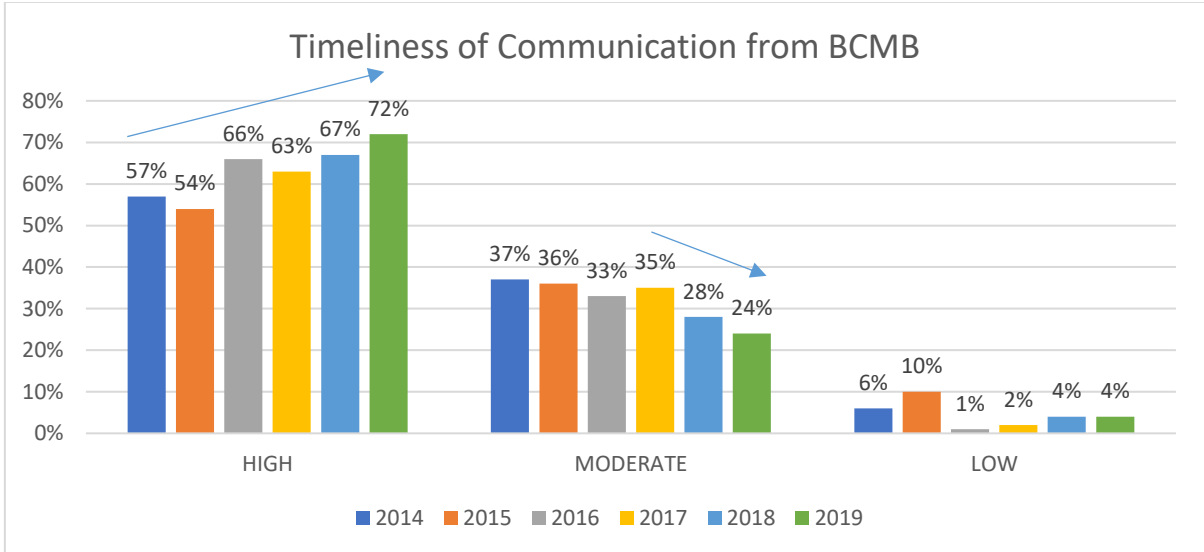
Chart 13: Ability to Contact BCMB Staff



Timeliness of BCMB Response to Requests

An increase in 'HIGH' satisfaction continued in 2019 with "MODERATE" decreasing and 'LOW' remaining static.

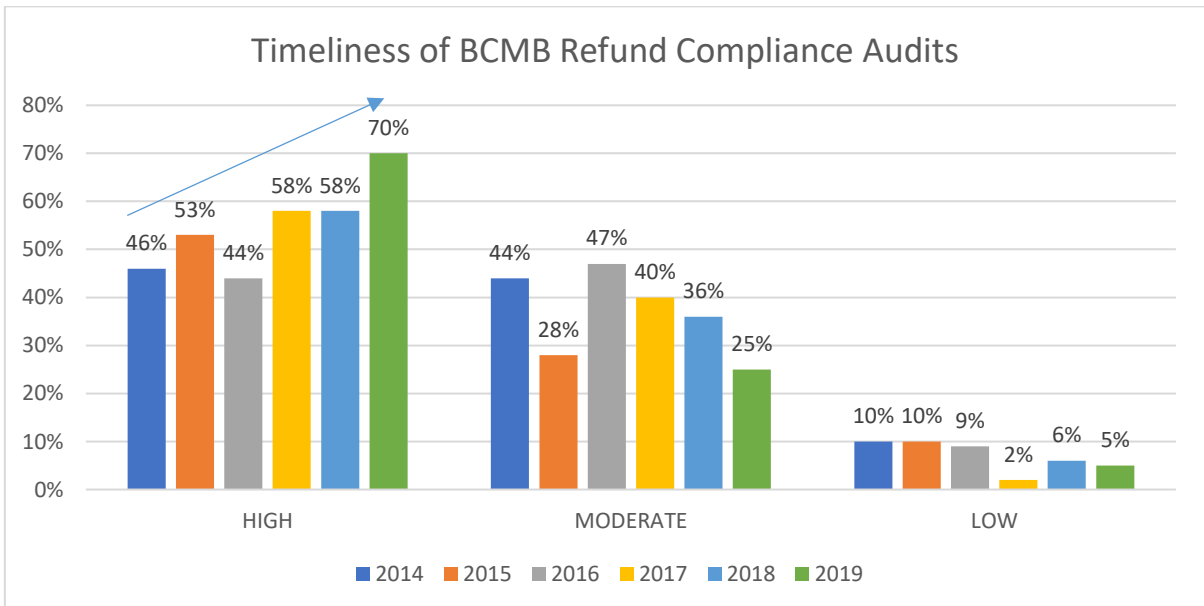
Chart 14: Timeliness of Communication from BCMB



Timeliness of Receipt of BCMB Refund Compliance Audits

An increase in 'HIGH' satisfaction is noted in 2019 with "MODERATE" and 'LOW' decreasing.

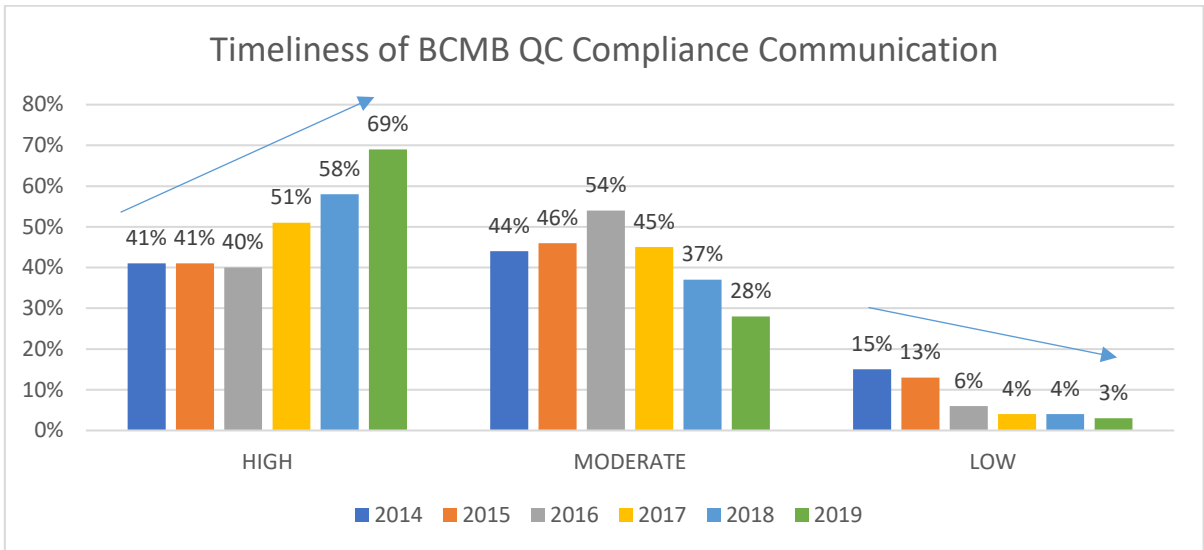
Chart 15: Timeliness of BCMB Refund Compliance Audits



Timeliness of QC Compliance Framework Movement Communication

'HIGH' satisfaction with QC Quality Compliance communication has steadily improved since 2016, lowering both "MODERATE" and 'LOW'.

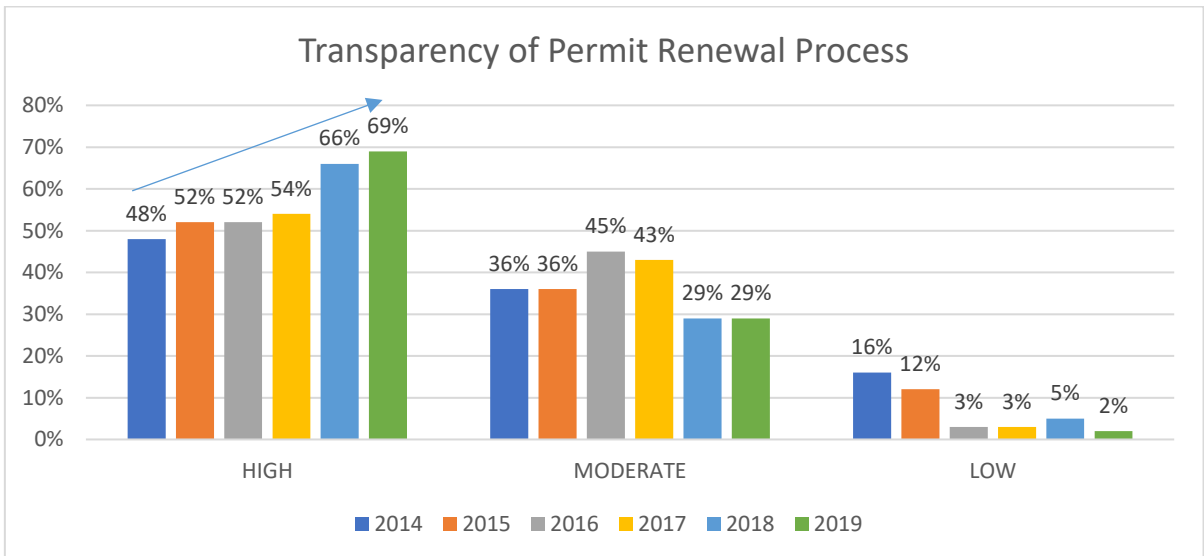
Chart 16: Timeliness of QC Compliance Communication



Transparency of Permit Renewal Process

A steady improvement in 'HIGH' satisfaction is noted since 2016, with 'LOW' dropping to 2% in 2019.

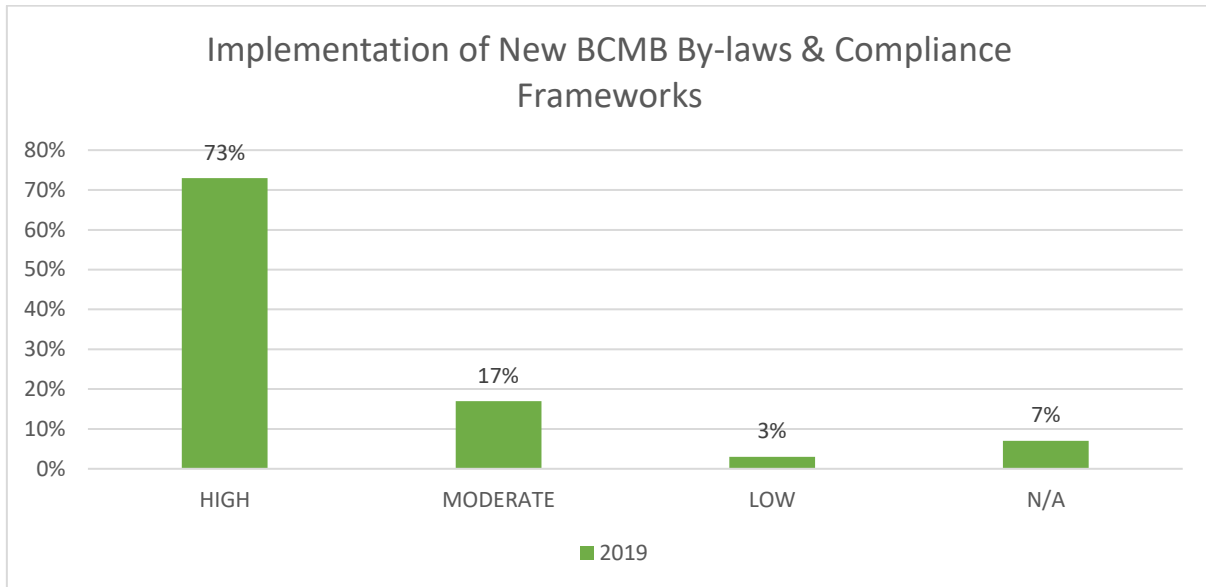
Chart 17: Transparency of Permit Renewal Process



Implementation of New BCMB By-laws and Compliance Frameworks

The satisfaction with the implementation of BCMB's new by-laws and Compliance Frameworks is a new measurement for 2019.

Chart 18: Implementation of New BCMB By-Laws & Compliance Frameworks

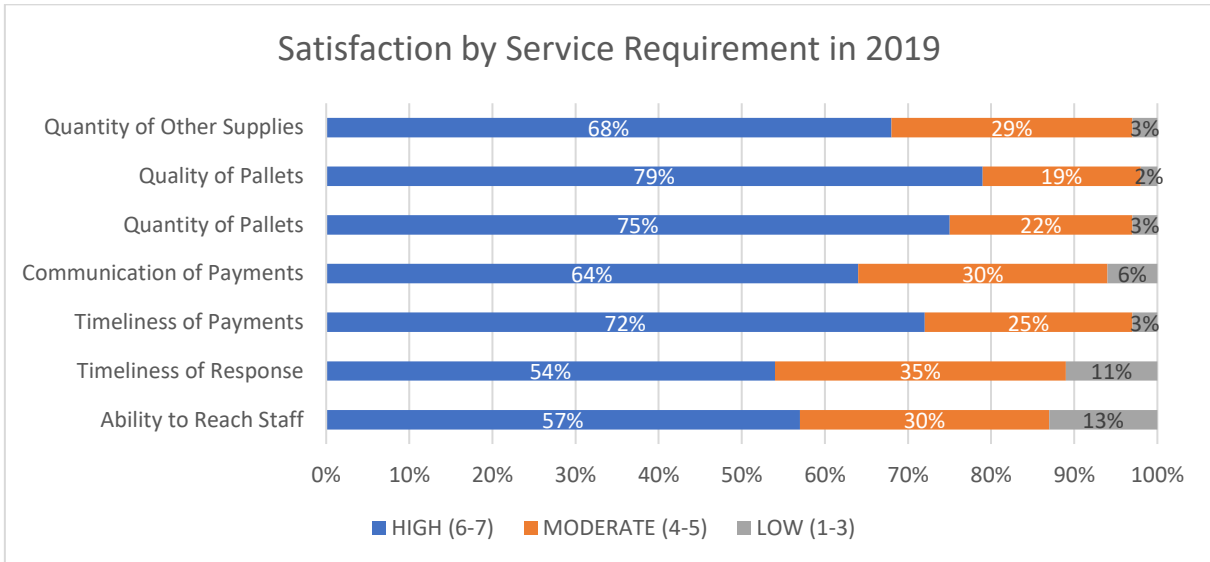


BDL Analysis

Satisfaction by Service Requirement in 2019

This is the fourth year that Depots were polled on BDL performance. A downward trend in satisfaction from the previous surveys has been reversed with some small improvements in feedback in almost all areas.

Chart 19: Satisfaction by Service Requirement in 2019 (BDL)

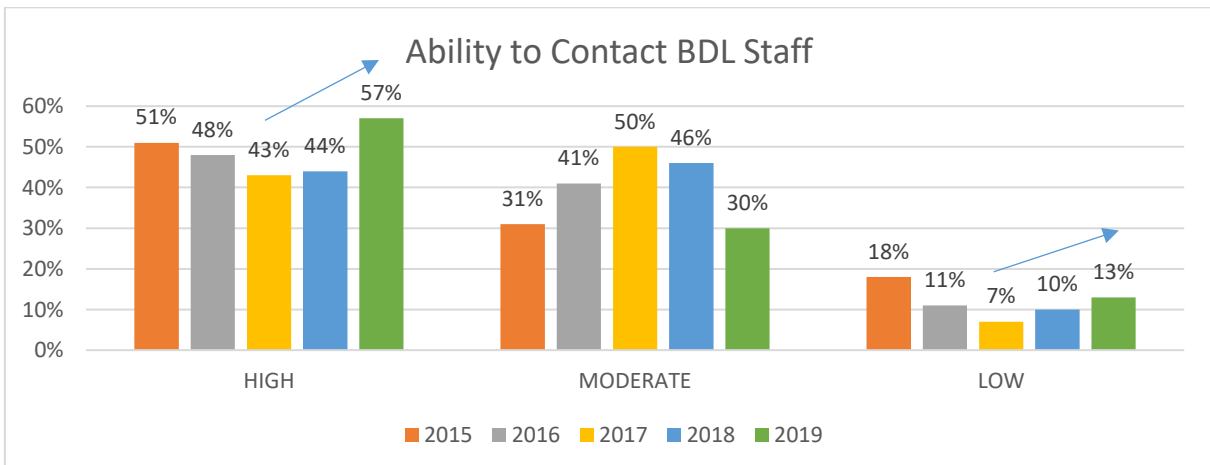


Satisfaction with Key Service Indicators for BDL

Ability to Contact BDL Staff

A significant increase in 'HIGH' satisfaction is noted along with a slight increase in 'LOW' satisfaction.

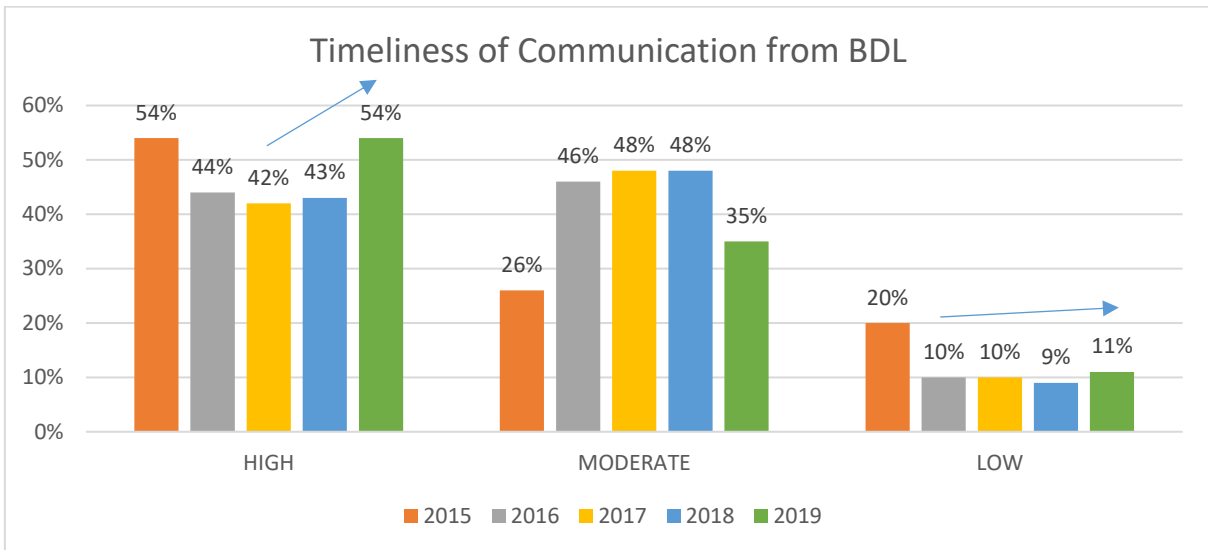
Chart 20: Ability to Contact BDL Staff



Timeliness of BDL Response to Requests

A significant increase in 'HIGH' satisfaction is noted along with a slight increase in 'LOW' satisfaction.

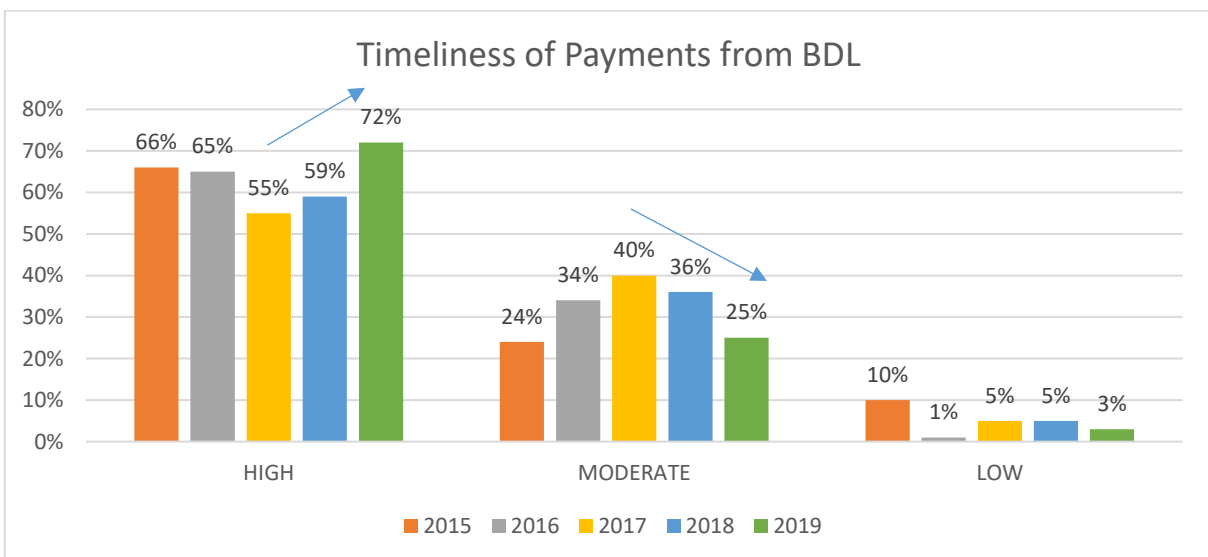
Chart 21: Timeliness of Communication from BDL



Timeliness of Payments Received from BDL

Results in the 'HIGH' area of this category have increased since 2017. There has been a significant decline in those depots indicating a 'MODERATE' satisfaction with payment timelines and a slight decrease in 'LOW' satisfaction.

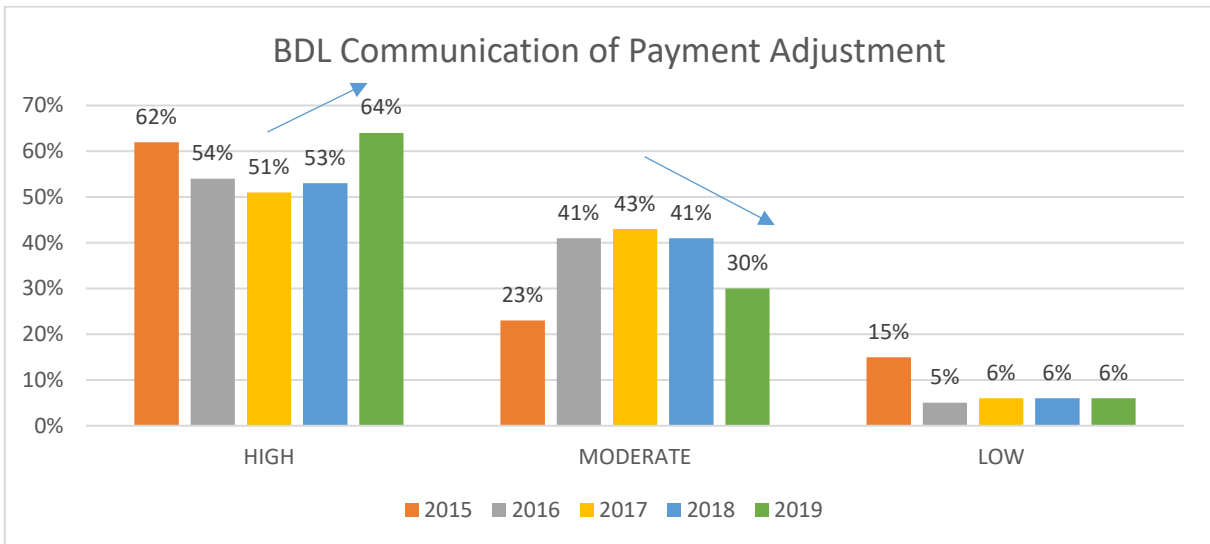
Chart 22: Timeliness of Payments from BDL



Communication of Payment Adjustments

An increase in 'HIGH' satisfaction is noted since 2017.

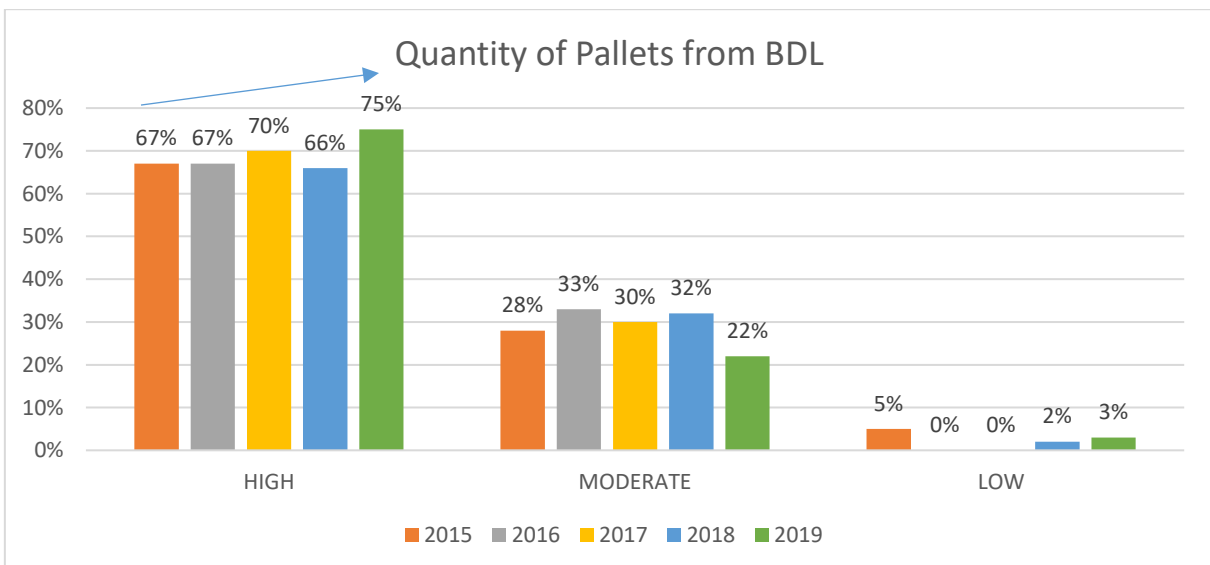
Chart 23: BDL Communication of Payment Adjustments



Quantity of Pallets from BDL

Since it's decrease in 2018, 'HIGH' satisfaction has increased significantly in 2019.

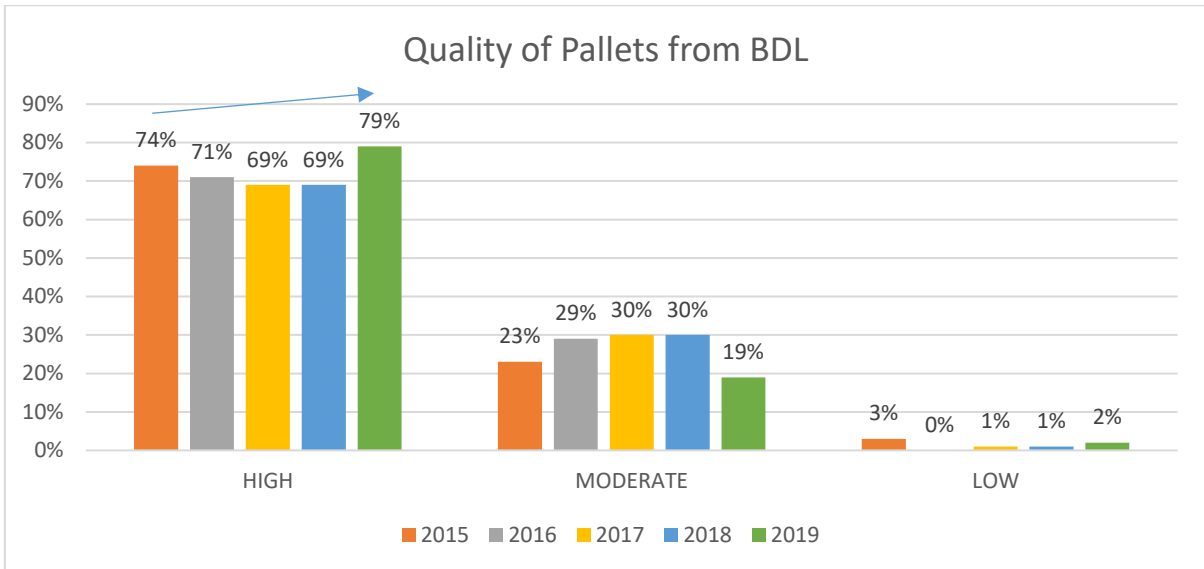
Chart 24: Quantity of Pallets from BDL



Quality of Pallets from BDL

This area has stopped its trending decrease in 'HIGH' satisfaction and in 2019 reached its highest satisfaction in 5 years.

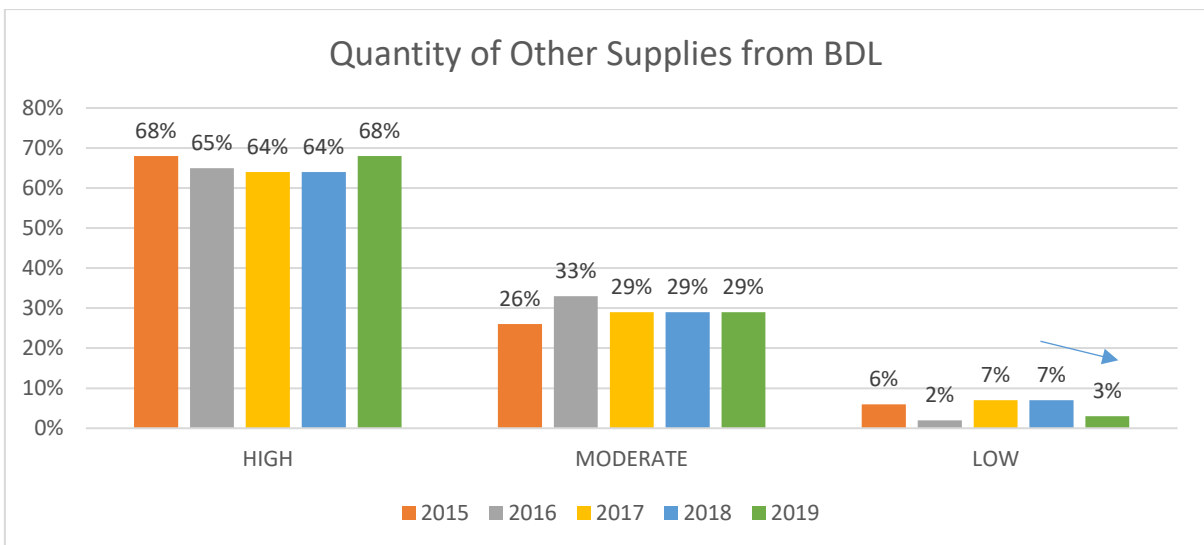
Chart 25: Quality of Pallets from BDL



Quantity of all Other Supplies from BDL

The results for 2019 are largely similar to 2018, with a drop in 'LOW' satisfaction noted.

Chart 26: Quantity of Other Supplies from BDL

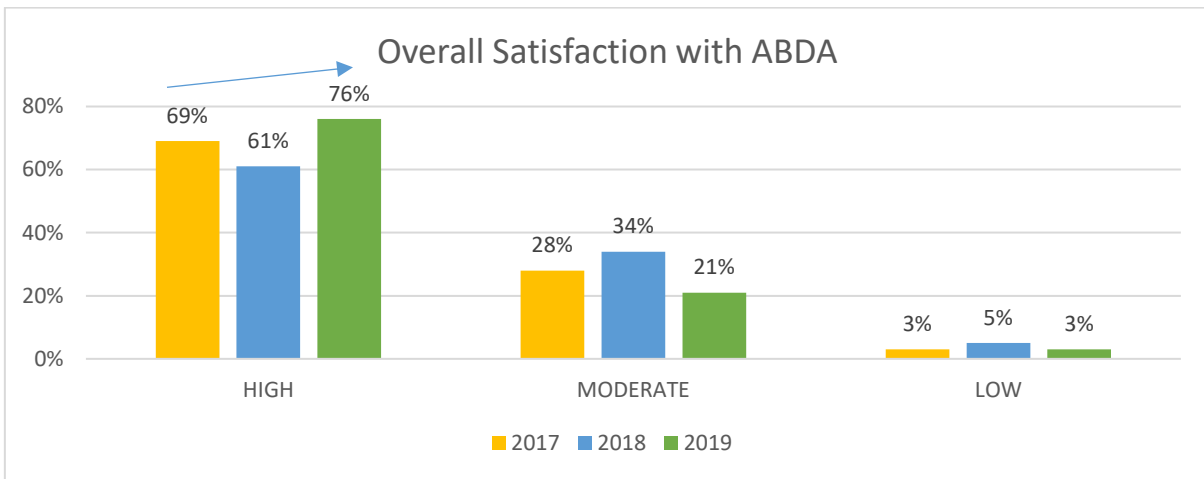


ABDA Analysis

Overall Satisfaction with ABDA

A significant increase in 'HIGH' satisfaction is noted along with a drop in 'MODERATE' satisfaction.

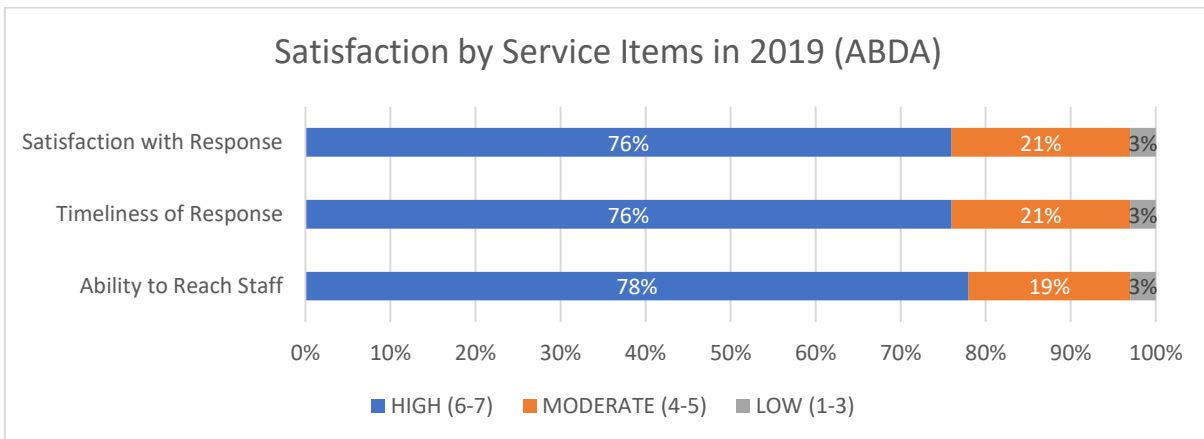
Chart 27: Overall Satisfaction with ABDA



Satisfaction by Service Items in 2019

Responses were broadly similar across all three categories.

Chart 28: Satisfaction by Service Items in 2019 (ABDA)



Information Items (2019)

The survey is also an opportunity to gather useful information on items that are otherwise not easily assessed. The following charts detail the information gathered during this year's survey.

Chart 29: How often does your Depot contact the ABDA?

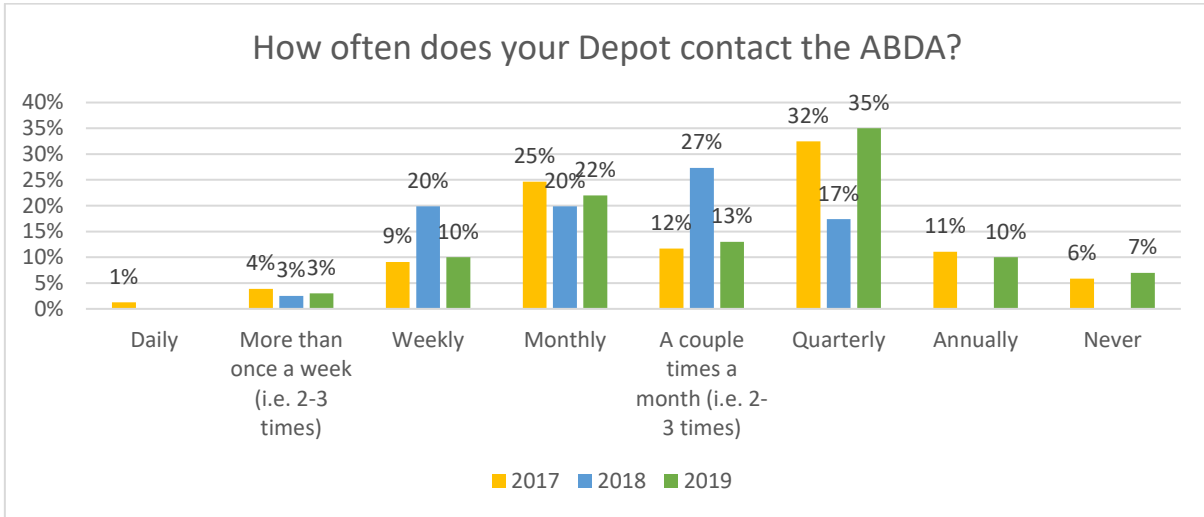


Chart 30: Does your Depot use ABDA POR Software?

