Depot Satisfaction Survey

2020

Contents

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 stakeholders on a series of service-related questions.

In October 2020, the BCMB conducted the annual Depot Satisfaction Survey for the seventh year in a row (the most recent five years are included in this report). The survey has been conducted annually to evaluate industry stakeholders on a fiscal year cycle. 2020 marks the fourth year that the ABDA has been included in the survey. Depot Permit Holders were asked to complete the survey online via Survey Monkey during the month of October. In October 2020 the Alberta Depot network consisted of 224 universal Depots. Of those 224 Depots, 162 Depot operators completed the 2020 Depot Satisfaction Survey resulting in a 72% completion rate. There was a 9% increase in participation rate in 2020 as compared to the 2019 survey. It is worth noting that prior to 2019, the BCMB received the majority of survey submissions online with an additional 5-10 surveys completed annually in-person at the Industry Conference in October/November. In-person survey submissions were accepted while the BCMB transitioned Permit Holders to full online survey submission. All survey submissions in 2019 and 2020 were completed online as the BCMB no longer conducts in-person Depot Satisfaction surveys.

Chart 1: **Survey Participation Rate**
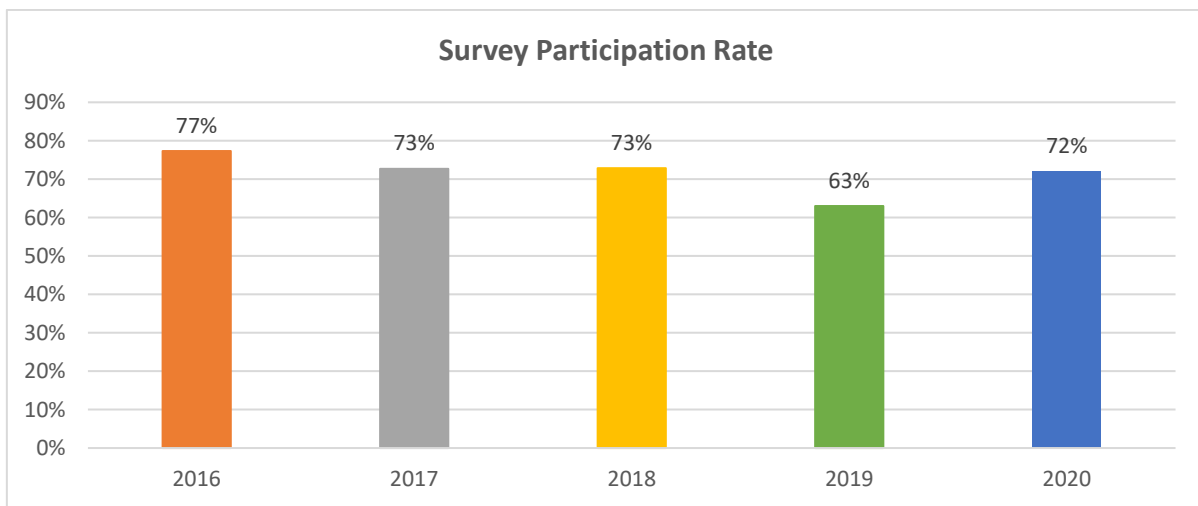
Survey Terminology

The 2020 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

2020 was unprecedented due to the COVID-19 pandemic that impacted Alberta and the Depot industry from March to December 2020 and continuing into 2021. Although the industry is considered an essential service, there were government and municipal mandated restrictions and guidelines that had an impact on all industry stakeholders. Additional factors that impacted industry stakeholders in 2020 included: cyber breaches (BCMB and BDL), changes in management, the pausing of some programs and projects and the introduction of cannabis beverage containers into the deposit system. Despite these factors, there was a five-year positive trend in satisfaction across most industry stakeholders in 2020. Each industry stakeholder showed improvement in many areas of satisfaction from the Depot network since the last survey. Notable areas to highlight in the report include the following:

ABCRC

a. Mega Bags: 'HIGH' satisfaction with the quality of mega bags from ABCRC increased from 49% in 2019 to 59% in 2020 (an increase of 10%) (**Chart 10**).

b. Communication: Depots' ability to contact staff at ABCRC saw a 2% increase in 'HIGH' satisfaction (76% 'HIGH' satisfaction), along with a 3% decrease in 'LOW' satisfaction (2% 'LOW' satisfaction), in 2020 as compared to 2019 (**Chart 4**).

BCMB

c. Communication: Satisfaction with the ability to contact BCMB staff increased from 72% in 2019 to 76% in 2020 (**Chart 13**) and the timeliness of communication increased from 72% in 2019 to 75% in 2020 (**Chart 14**).

d. Renewal Process Transparency: Satisfaction with the permit renewal process transparency is at an all time high in 2020 with 'HIGH' satisfaction at 75% (as compared to 69% in 2019) (**Chart 17**).

BDL

e. Communication: Satisfaction in the Depot network's ability to reach BDL and the timeliness of their response improved in 2020 as compared to 2019. This improvement was seen in the ability to contact staff (77% 'HIGH' satisfaction; an increase of 20%) and timeliness of communication (81% 'HIGH' satisfaction; an increase of 27%). (**Charts 20, 21**).

ABDA

f. Overall Satisfaction: This is the fourth year the survey has assessed the ABDA. Overall satisfaction increased by 11% (76% 'HIGH' satisfaction in 2019 to 87% 'HIGH' satisfaction in 2020) (**Chart 27**).

ABCRC Statistics

The below statistics display Depots' satisfaction within each service area.

Chart 2: Overall Satisfaction with ABCRC
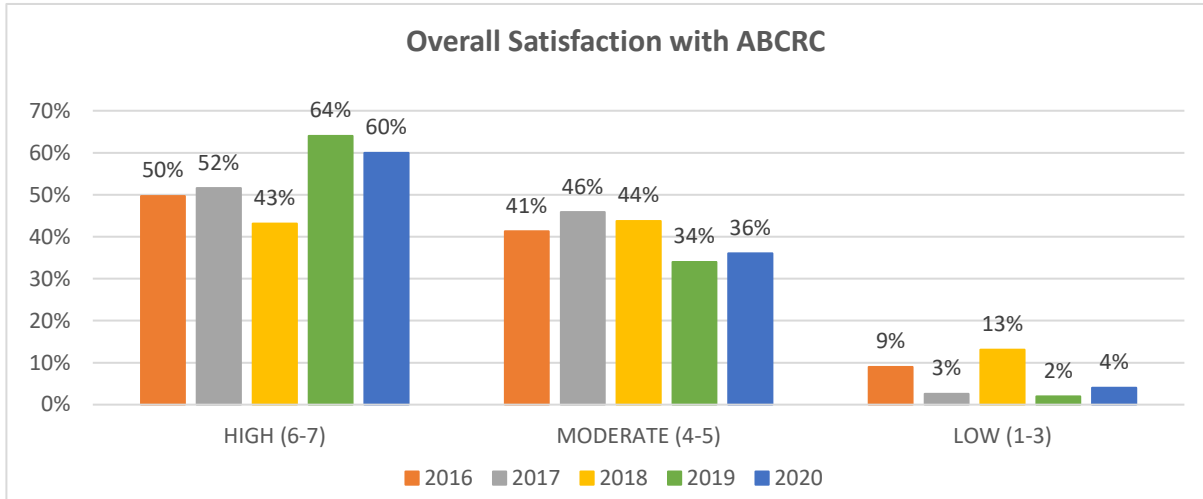
Chart 3: Satisfaction by Service Requirement in 2020

The following graph displays a breakdown of all service requirements provided by ABCRC.
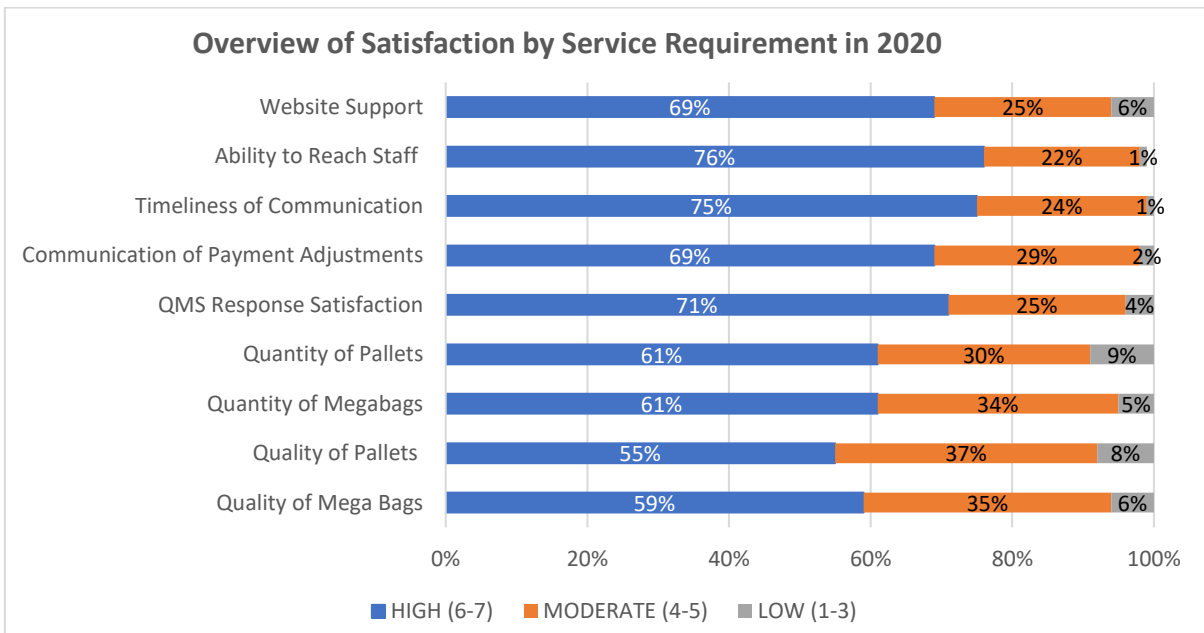
Chart 4: Ability to Contact ABCRC Staff

Ability to Contact ABCRC Staff

Category	2016	2017	2018	2019	2020
HIGH	56%	61%	54%	74%	76%
MODERATE	40%	36%	42%	21%	22%
LOW	4%	3%	4%	5%	2%
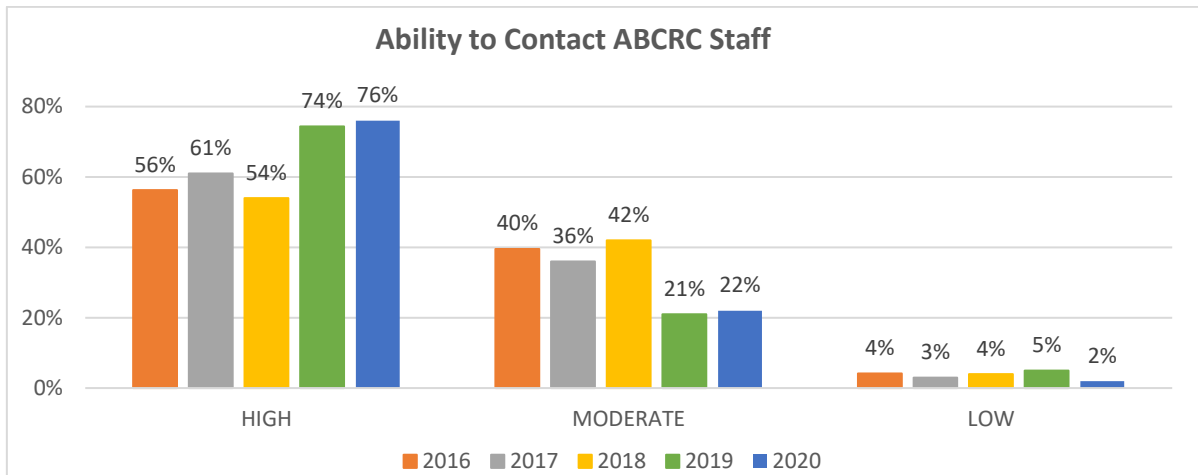
Chart 5: Timeliness of Communication from ABCRC

Timeliness of Communication from ABCRC

Category	2016	2017	2018	2019	2020
HIGH	49%	52%	54%	76%	75%
MODERATE	44%	43%	39%	21%	24%
LOW	8%	4%	7%	3%	1%
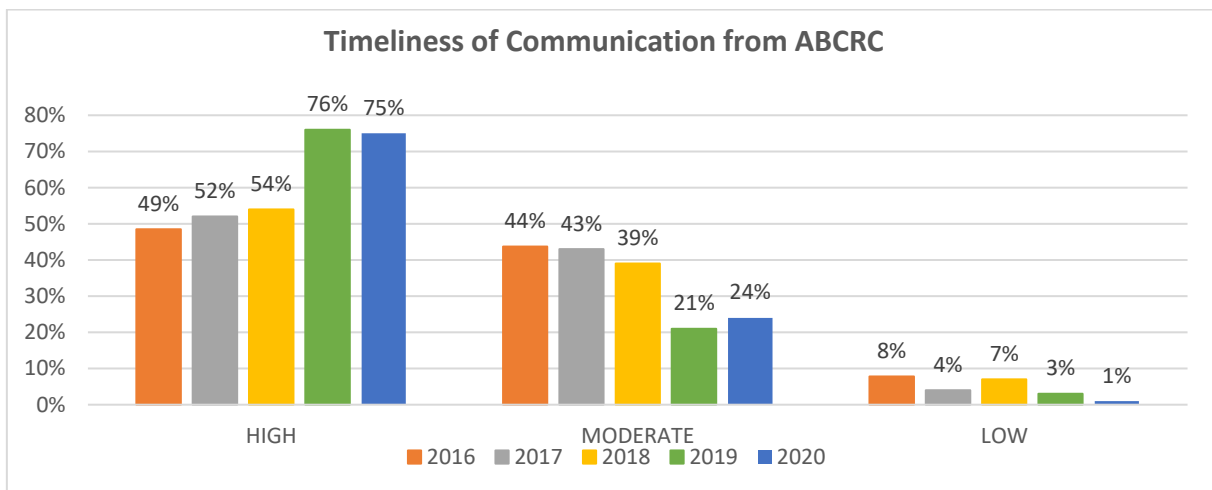
Chart 6: ABCRC Communication of Payment Adjustments

ABCRC Communication of Payment Adjustments

Category	2016	2017	2018	2019	2020
HIGH	62%	64%	64%	74%	69%
MODERATE	32%	34%	30%	25%	29%
LOW	5%	2%	6%	1%	2%
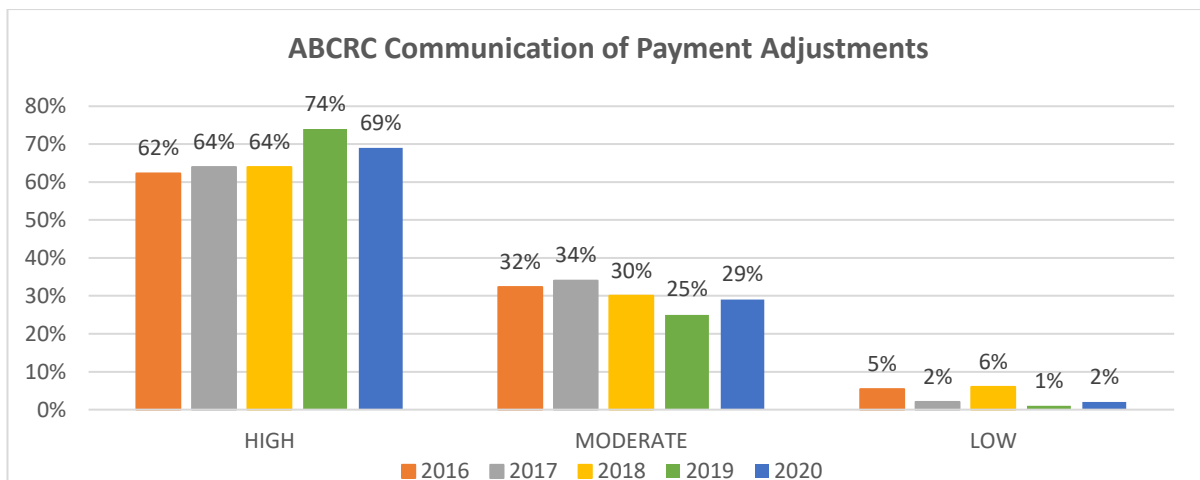
Chart 7: Quantity of Pallets from ABCRC

Quantity of Pallets from ABCRC

HIGH: 2016 57%, 2017 62%, 2018 41%, 2019 57%, 2020 61%
MODERATE: 2016 37%, 2017 33%, 2018 43%, 2019 32%, 2020 30%
LOW: 2016 6%, 2017 5%, 2018 16%, 2019 11%, 2020 9%

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020
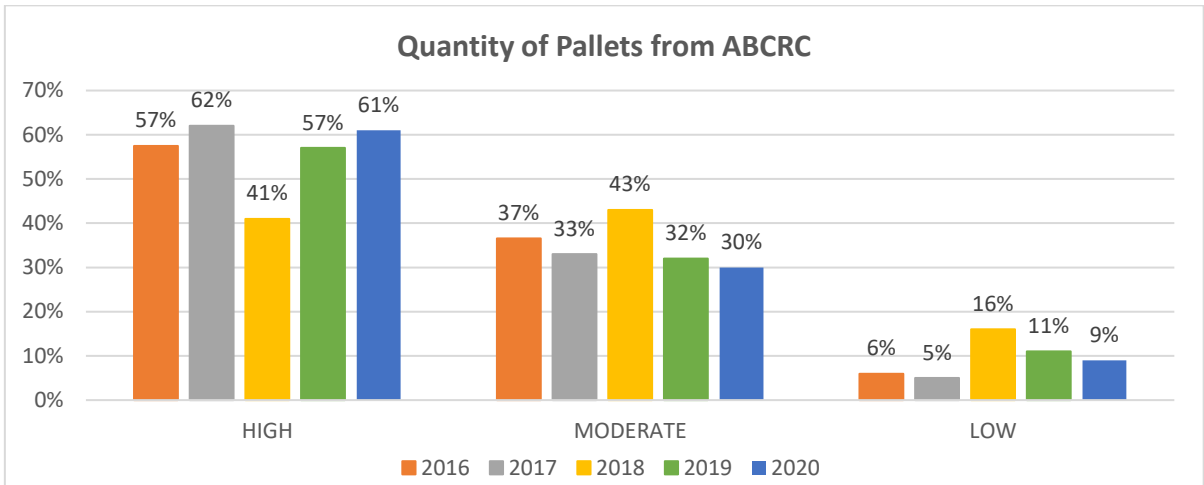
Chart 8: Quantity of Mega Bags from ABCRC

Quantity of Mega Bags from ABCRC

HIGH: 2016 57%, 2017 47%, 2018 45%, 2019 62%, 2020 61%
MODERATE: 2016 39%, 2017 49%, 2018 38%, 2019 31%, 2020 34%
LOW: 2016 4%, 2017 4%, 2018 17%, 2019 7%, 2020 5%

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020

Chart 9: Quality of Pallets from ABCRC

Quality of Pallets from ABCRC

HIGH: 2016 50%, 2017 45%, 2018 42%, 2019 48%, 2020 55%
MODERATE: 2016 46%, 2017 48%, 2018 49%, 2019 38%, 2020 37%
LOW: 2016 4%, 2017 6%, 2018 9%, 2019 14%, 2020 8%

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020
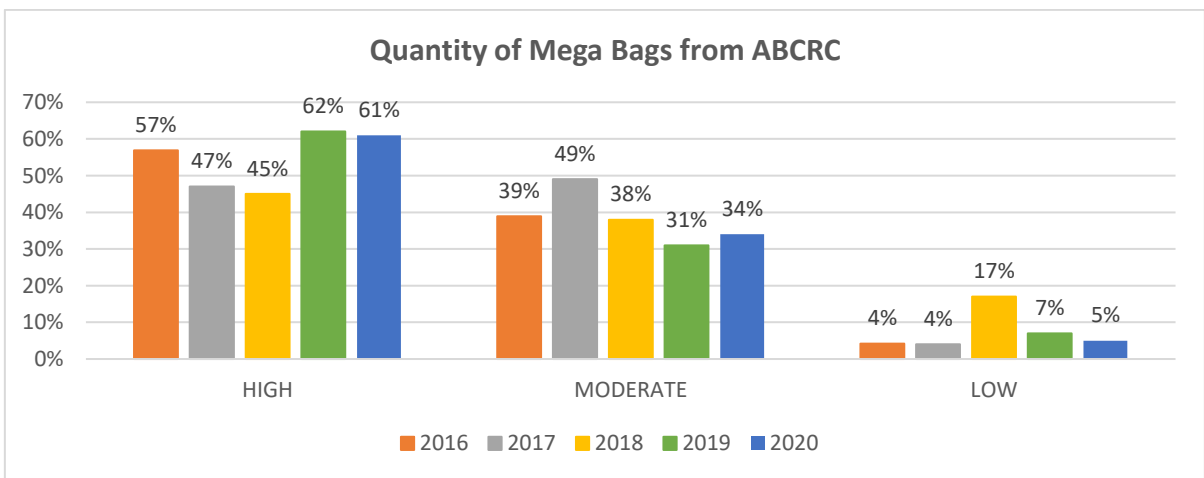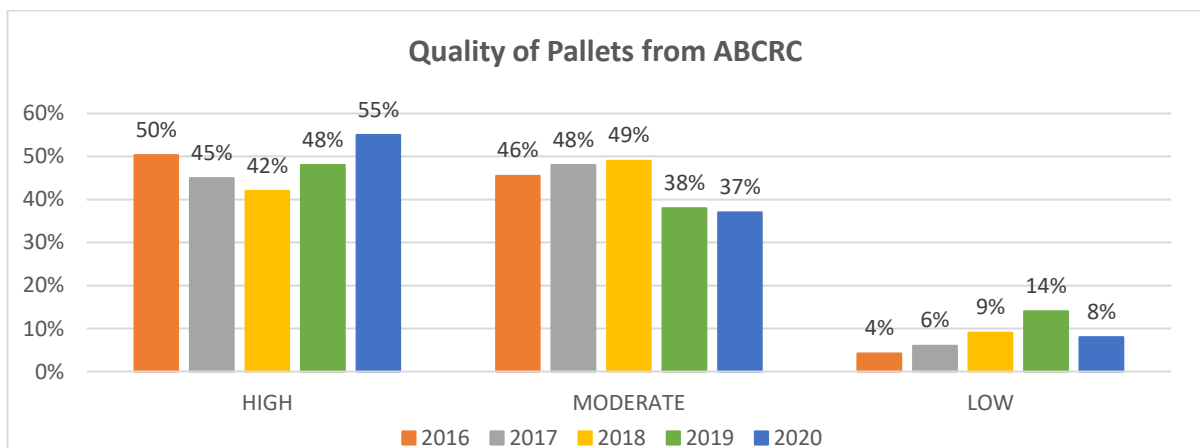
Chart 10: Quality of Mega Bags from ABCRC

Quality of Mega Bags from ABCRC

	HIGH	MODERATE	LOW
2016	44%	50%	7%
2017	61%	33%	6%
2018	52%	41%	7%
2019	49%	41%	10%
2020	59%	35%	6%
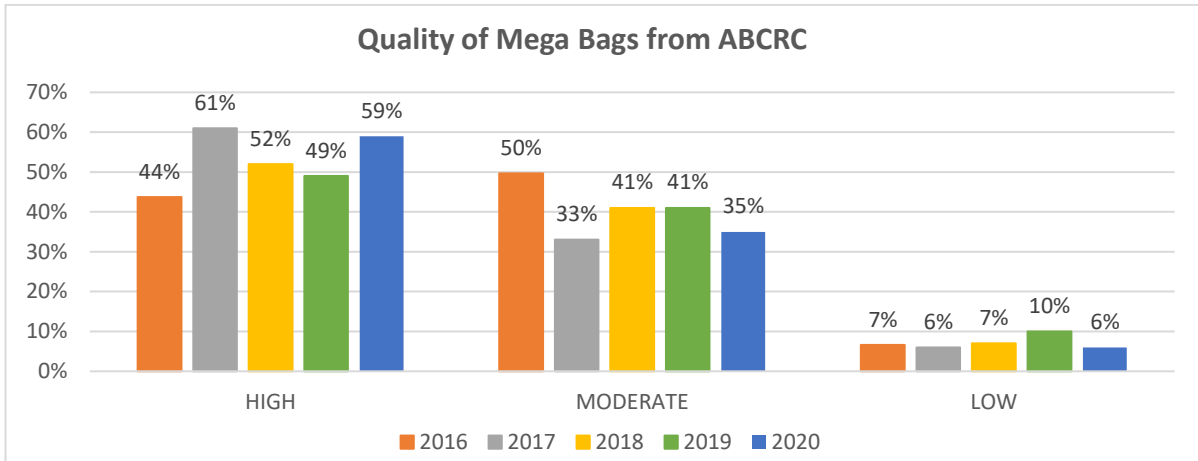
Chart 11: Service Provided by ABCRC Designated Carrier

Service Provided by ABCRC Designated Carrier

	HIGH (6-7)	MODERATE (4-5)	LOW (1-3)
2016	66%	32%	2%
2017	60%	38%	2%
2018	59%	35%	6%
2019	66%	29%	5%
2020	71%	28%	1%
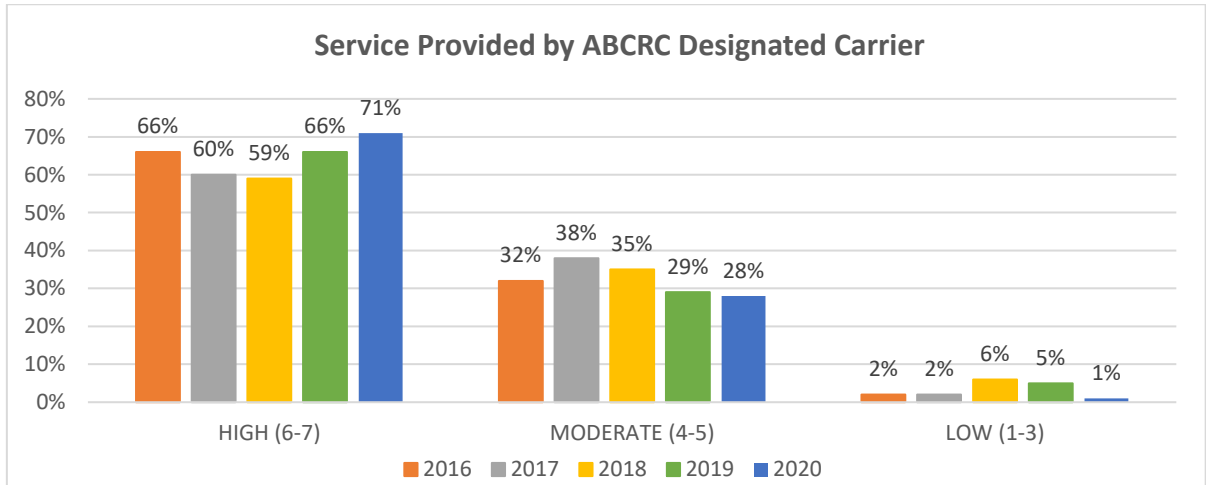
BCMB Statistics

The below statistics display Depots' satisfaction within each service area.

Chart 12: Satisfaction by Service Requirement in 2020

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

Satisfaction by Service Requirement in 2020

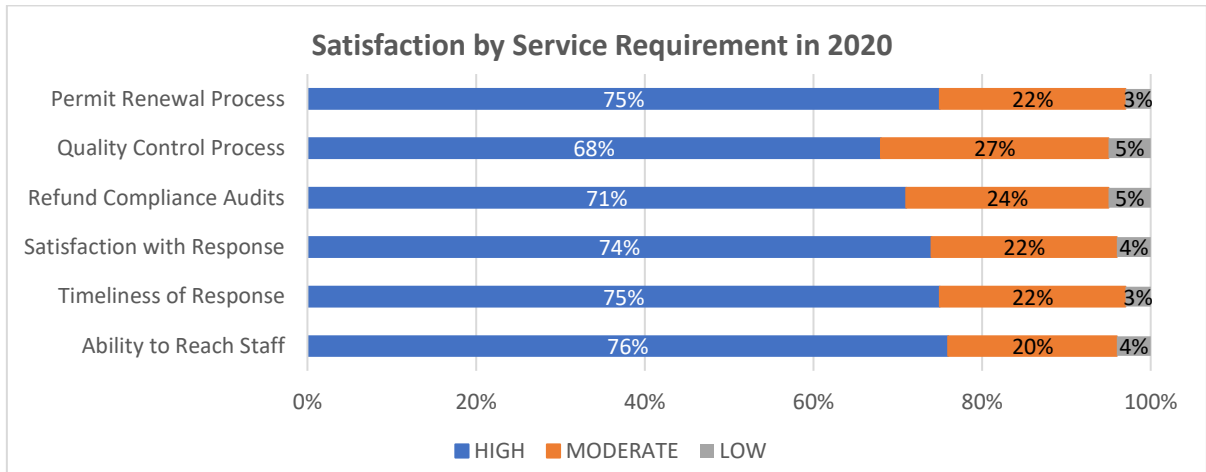| Service Requirement	HIGH	MODERATE	LOW
Permit Renewal Process	75%	22%	3%
Quality Control Process	68%	27%	5%
Refund Compliance Audits	71%	24%	5%
Satisfaction with Response	74%	22%	4%
Timeliness of Response	75%	22%	3%
Ability to Reach Staff	76%	20%	4%

Chart 13: Ability to Contact BCMB Staff

Ability to Contact BCMB Staff

	2016	2017	2018	2019	2020
HIGH	65%	63%	67%	72%	76%
MODERATE	33%	35%	31%	24%	20%
LOW	2%	2%	3%	4%	4%
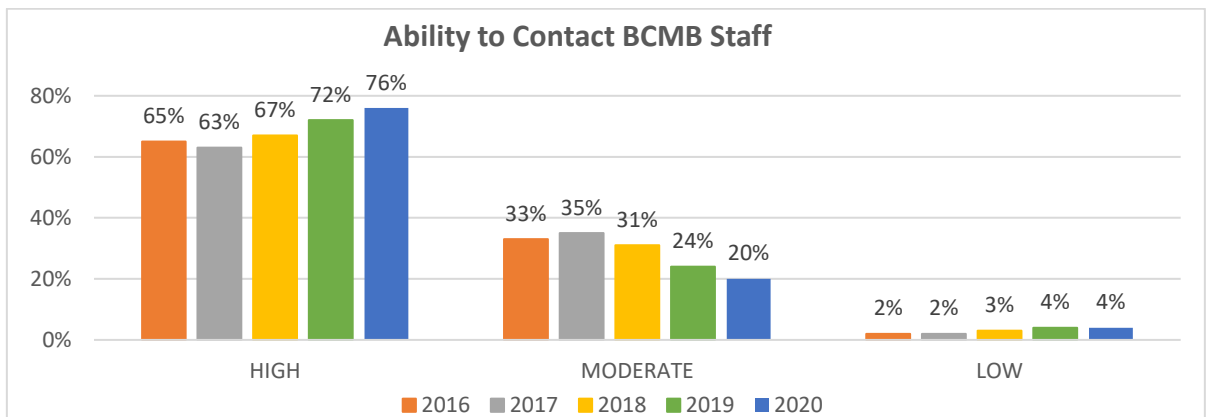
Chart 14: Timeliness of BCMB Response to Requests

Timeliness of BCMB Response to Requests

	2016	2017	2018	2019	2020
HIGH	66%	63%	67%	72%	75%
MODERATE	33%	35%	28%	24%	22%
LOW	1%	2%	4%	4%	3%
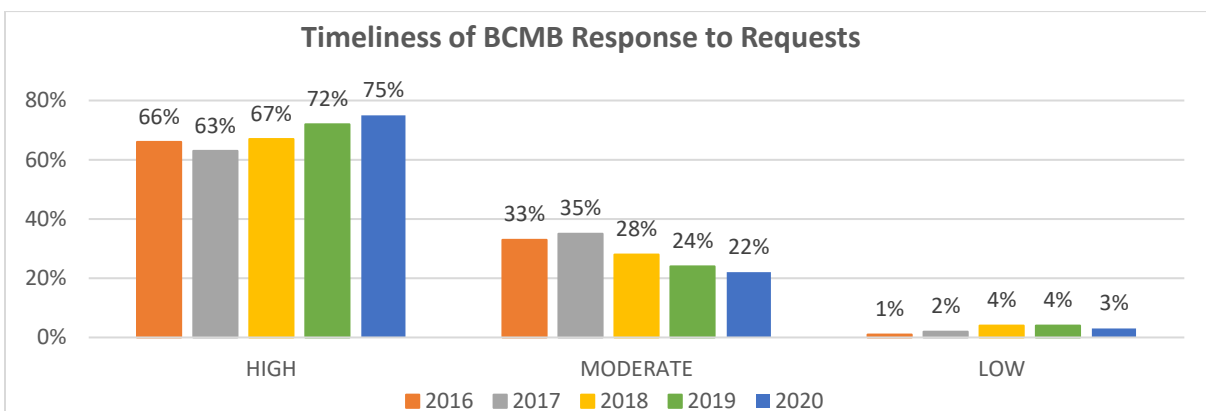
Chart 15: Timeliness of Receipt of BCMB Refund Compliance Audit

Timeliness of BCMB Refund Compliance Audits

	HIGH	MODERATE	LOW
2016	44%	47%	9%
2017	58%	40%	2%
2018	58%	36%	6%
2019	70%	25%	5%
2020	71%	24%	5%
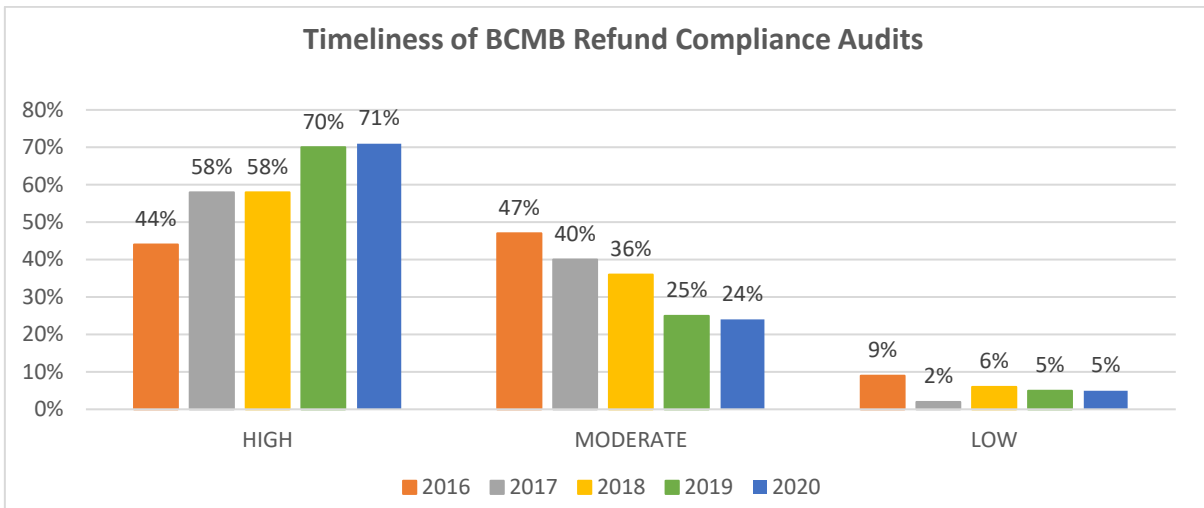
Chart 16: Timeliness of QC Compliance Framework Movement Communication

Timeliness of BCMB QC Compliance Communication

	HIGH	MODERATE	LOW
2016	40%	54%	6%
2017	51%	45%	4%
2018	58%	37%	4%
2019	69%	28%	3%
2020	68%	27%	5%
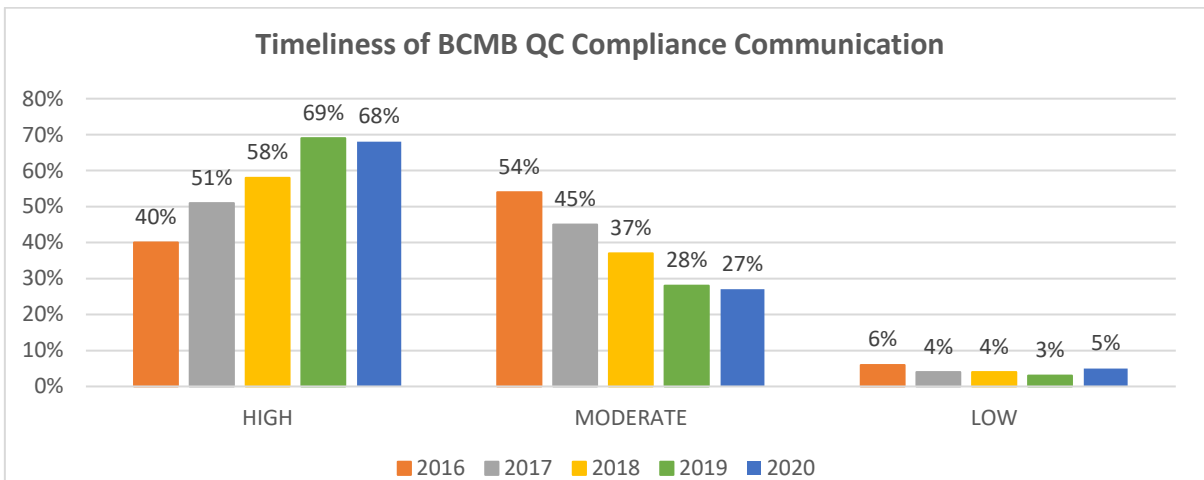
Chart 17: Transparency of Permit Renewal Process

Transparency of Permit Renewal Process

	HIGH	MODERATE	LOW
2016	52%	45%	3%
2017	54%	43%	3%
2018	66%	29%	5%
2019	69%	29%	2%
2020	75%	22%	3%

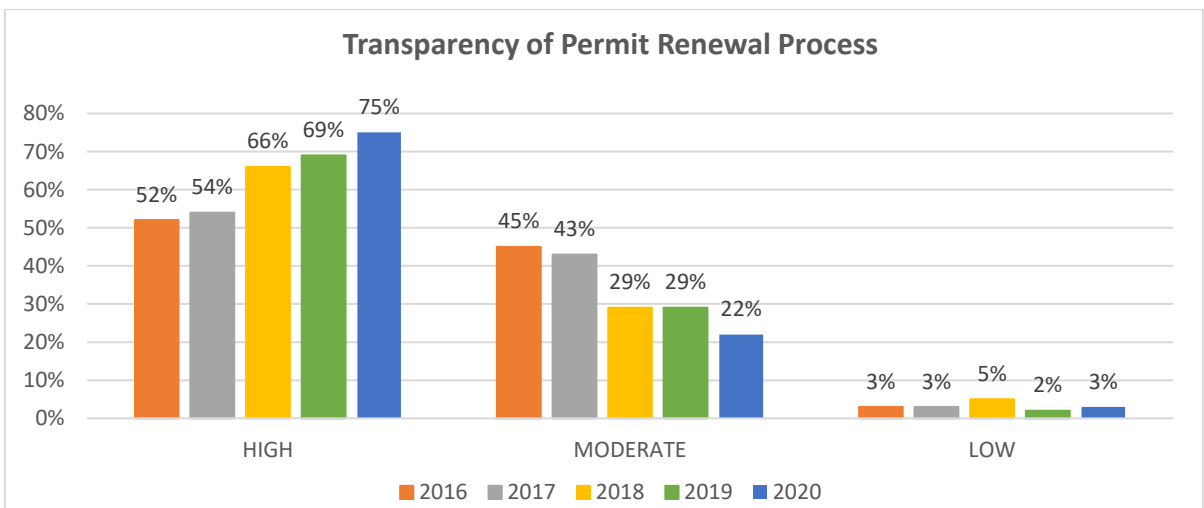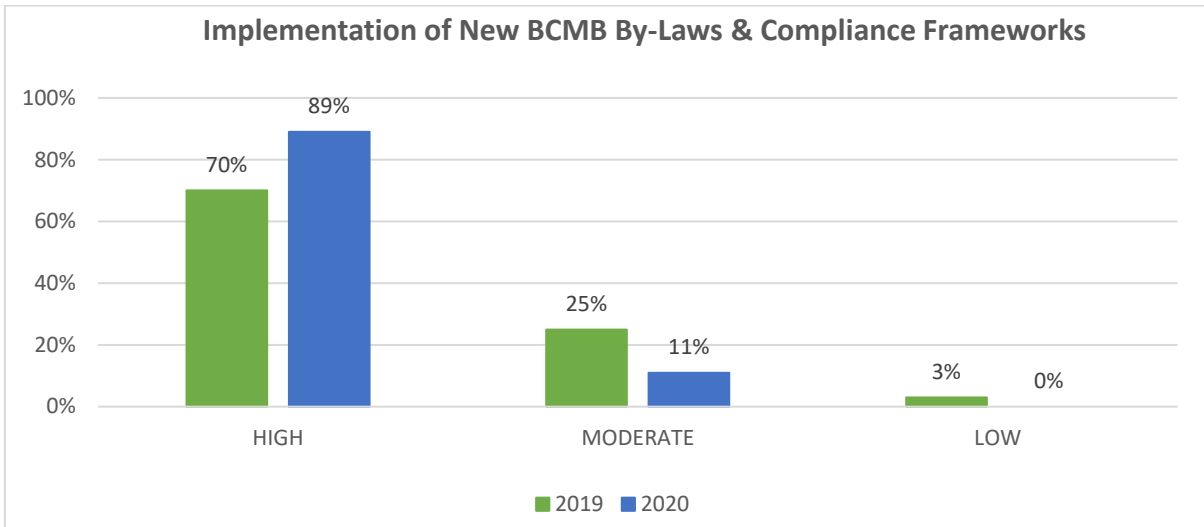**Chart 18**: Implementation of New BCMB By-laws and Compliance Frameworks

This is the second year we have measured the Depots' satisfaction with the implementation of BCMB's new by-laws and Compliance Frameworks.

Implementation of New BCMB By-Laws & Compliance Frameworks

BDL Statistics

The below statistics display Depots' satisfaction within each service area.

Chart 19: Satisfaction by Service Requirement in 2020

The following graph displays a breakdown of all service requirements provided by BDL.
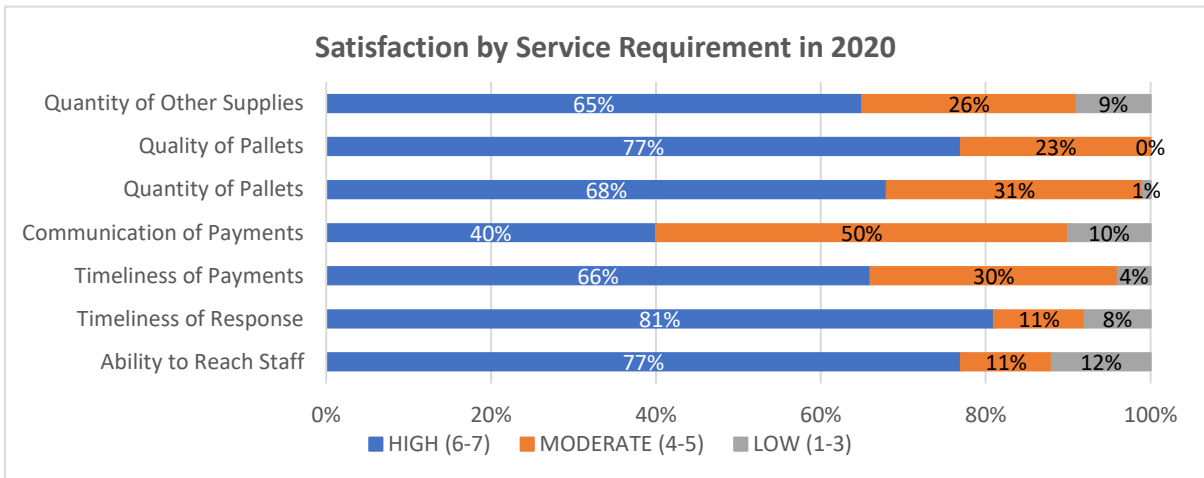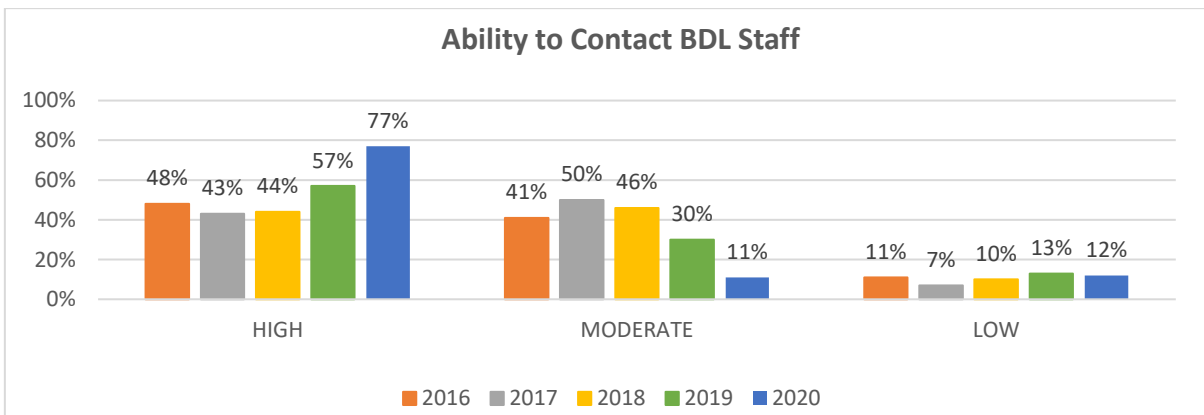
Satisfaction by Service Requirement in 2020

Service Requirement	HIGH (6-7)	MODERATE (4-5)	LOW (1-3)
Quantity of Other Supplies	65%	26%	9%
Quality of Pallets	77%	23%	0%
Quantity of Pallets	68%	31%	1%
Communication of Payments	40%	50%	10%
Timeliness of Payments	66%	30%	4%
Timeliness of Response	81%	11%	8%
Ability to Reach Staff	77%	11%	12%

Chart 20: Ability to Contact BDL Staff

Ability to Contact BDL Staff

	2016	2017	2018	2019	2020
HIGH	48%	43%	44%	57%	77%
MODERATE	41%	50%	46%	30%	11%
LOW	11%	7%	10%	13%	12%

Chart 21: Timeliness of BDL Response to Requests

Timeliness of Communication from BDL

	2016	2017	2018	2019	2020
HIGH	44%	42%	43%	54%	81%
MODERATE	46%	48%	48%	35%	11%
LOW	10%	10%	9%	11%	8%
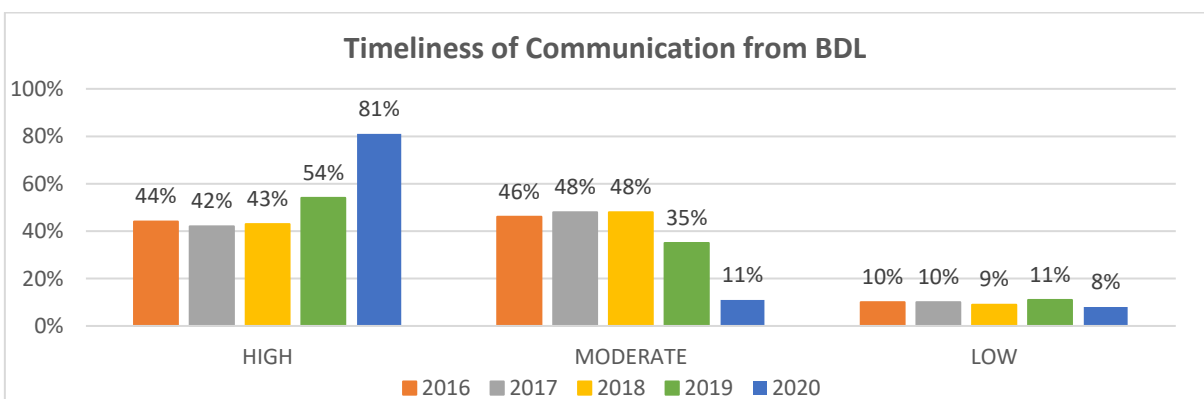
Chart 22: Timeliness of Payments Received from BDL

Timeliness of Payments from BDL

- HIGH: 2016 65%, 2017 55%, 2018 59%, 2019 72%, 2020 66%
- MODERATE: 2016 34%, 2017 40%, 2018 36%, 2019 25%, 2020 30%
- LOW: 2016 1%, 2017 5%, 2018 5%, 2019 3%, 2020 4%

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020
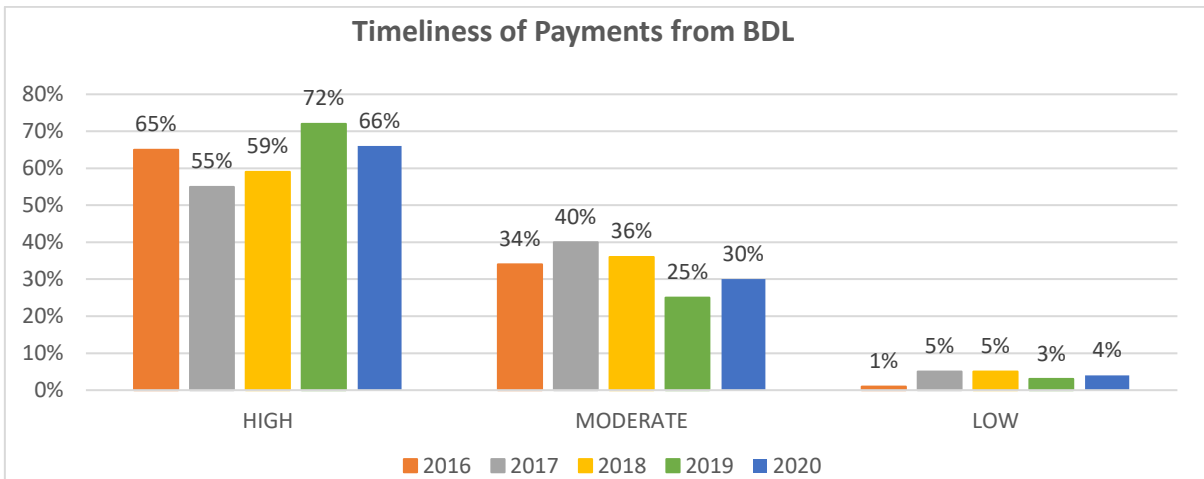
Chart 23: BDL Communication of Payment Adjustments

BDL Communication of Payment Adjustment

- HIGH: 2016 54%, 2017 51%, 2018 53%, 2019 64%, 2020 60%
- MODERATE: 2016 41%, 2017 43%, 2018 41%, 2019 30%, 2020 29%
- LOW: 2016 5%, 2017 6%, 2018 6%, 2019 6%, 2020 11%

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020
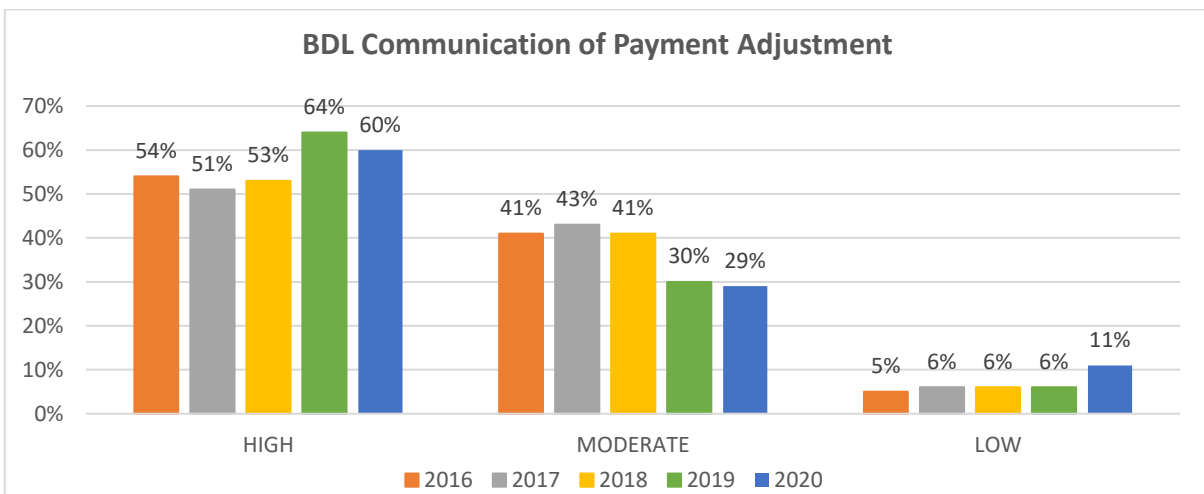
Chart 24: Quantity of Pallets from BDL

Quantity of Pallets from BDL

- HIGH: 2016 67%, 2017 70%, 2018 66%, 2019 75%, 2020 68%
- MODERATE: 2016 33%, 2017 30%, 2018 32%, 2019 22%, 2020 31%
- LOW: 2016 0%, 2017 0%, 2018 2%, 2019 3%, 2020 1%

■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020

Chart 25: Quality of Pallets from BDL
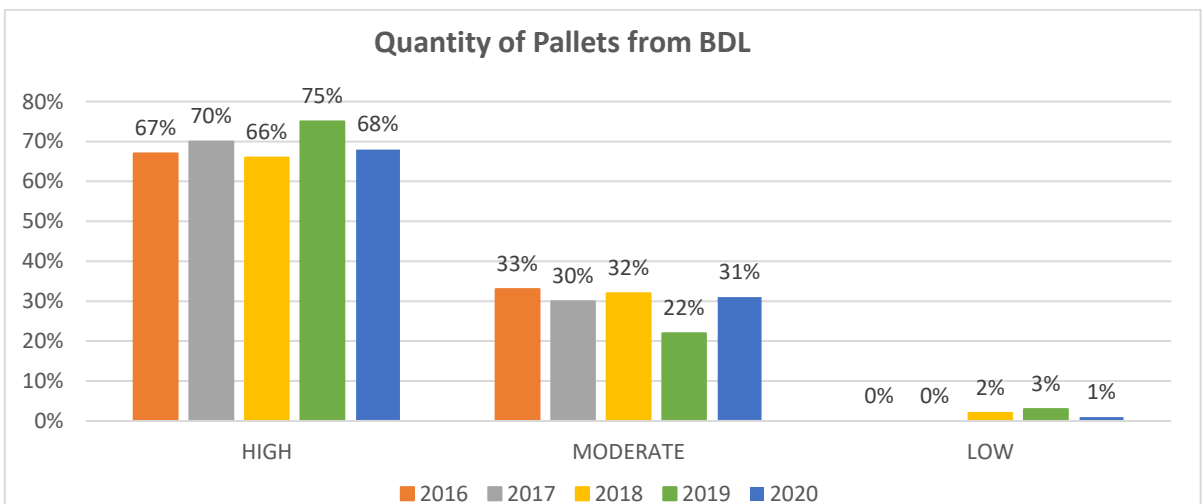

Quality of Pallets from BDL
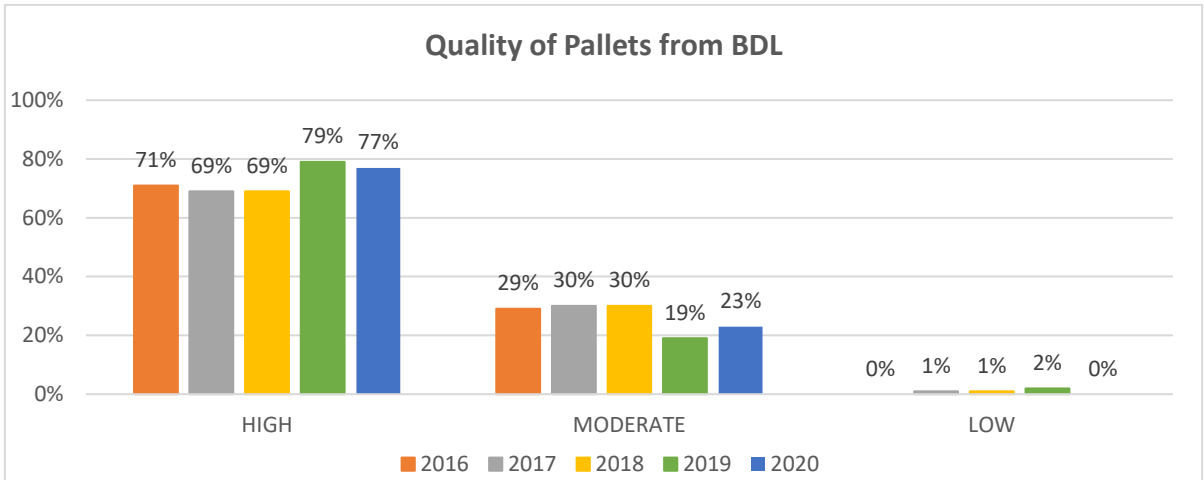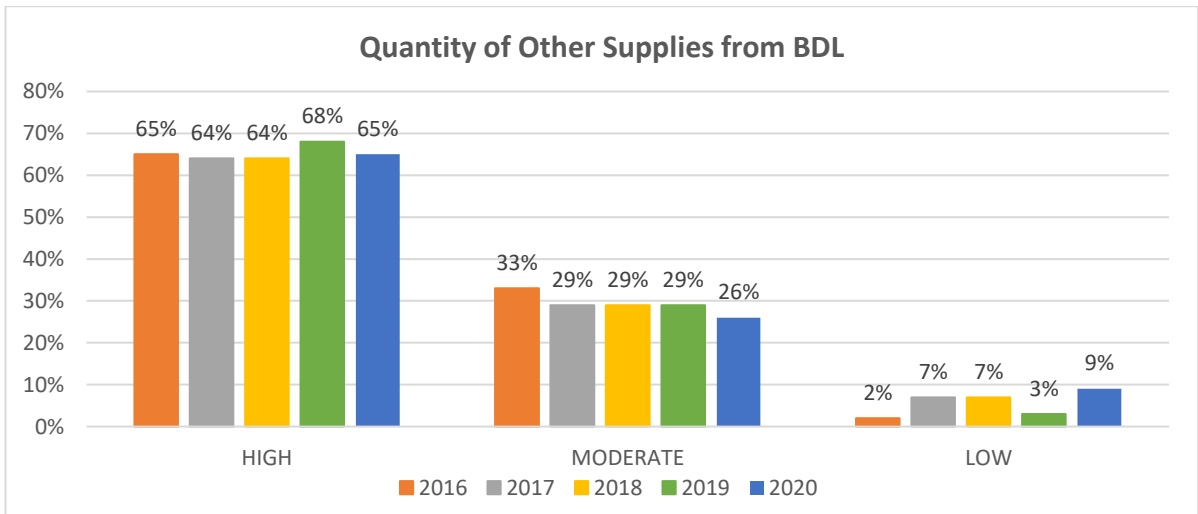
Chart 26: Quantity of all Other Supplies from BDL

Quantity of Other Supplies from BDL

ABDA Statistics

The below statistics display Depots' satisfaction within each service area.
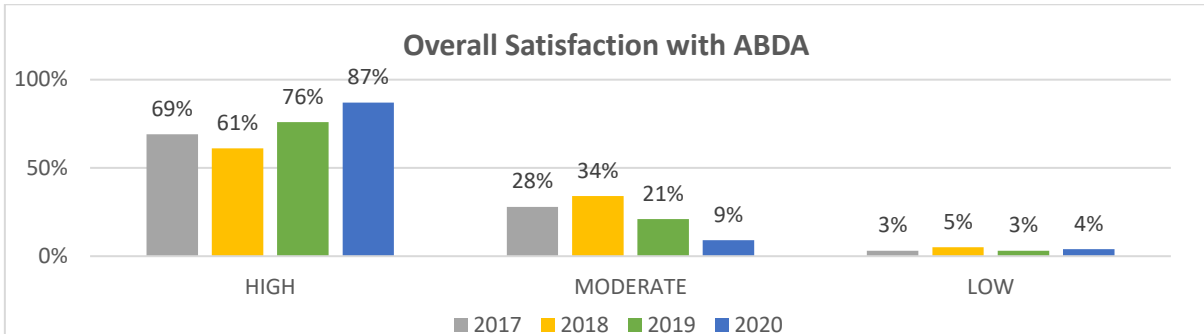
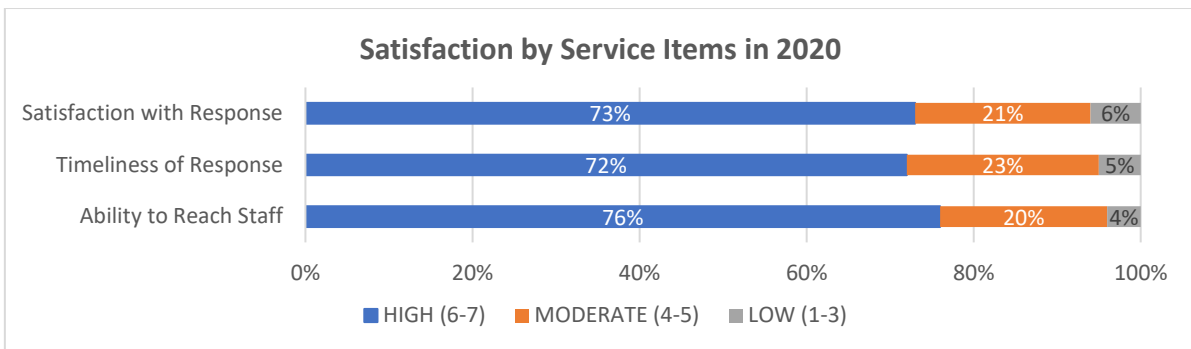**Chart 27**: Overall Satisfaction with ABDA

Chart 28: Satisfaction by Service Items in 2020

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

Information Items

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.

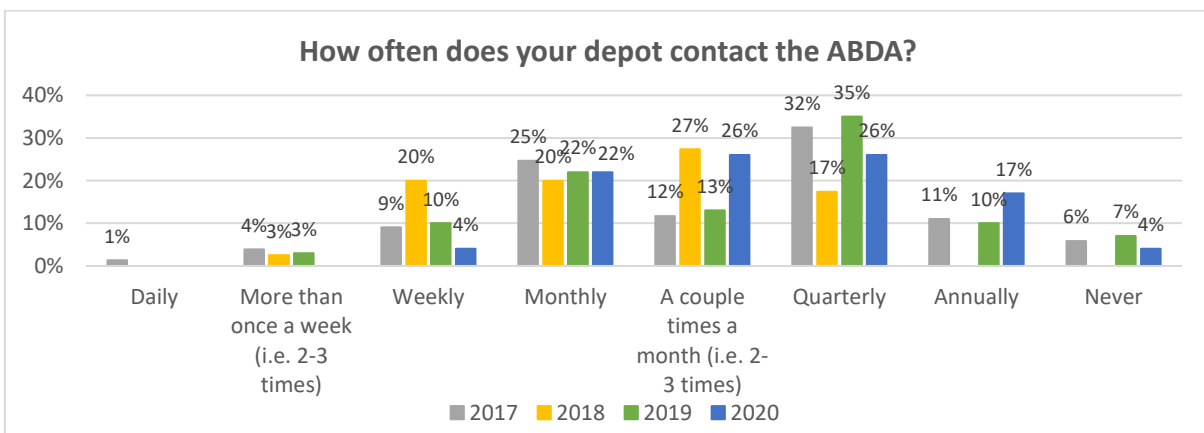**Chart 29**: How often does your Depot contact the ABDA?

Chart 30: Does your Depot use ABDA POR Software?

Effective December 31, 2020, all Depots handling six million Containers per year or more must have a Point of Return (POR) system installed at their Depot. The below chart shows the number of Depots that responded that are using the ABDA's POR software.

Does your Depot use ABDA POR?

	Yes	No
2017	62%	38%
2018	71%	29%
2019	72%	28%
2020	78%	22%