

2019 RPRA Registrant Perception Survey



Final Report
December 13, 2019

Introduction

RPRA stakeholder research was conducted in two phases:

The first phase was a series of in-depth interviews to: a) develop a well-founded understanding of relations between RPRA and its stakeholders, and; b) to help with the design of the second phase of the study – a baseline survey of RPRA stakeholders.

The second phase baseline survey focused on Tire Registrants (producers, collectors, haulers, processors, retreaders and Producer Responsibility Organizations (PROs).

Both phases of the research focused on four key topic areas:

- Transition, registration and reporting.
- Stakeholder familiarity with and perceptions of RPRA.
- Understanding of and support for RPRA's mandate, Individual Producer Responsibility (IPR) and the circular economy (CE).
- Interaction with RPRA, service delivery and performance.

Phase 1: In-Depth Stakeholder Interview Methodology

- Semi-structured telephone interviews with registrants (n=34) and non-registrants (n=11) across all material groups
- Interviews took place July and August of 2019.
- Non-registrant interviews conducted first to gain broader understanding of stakeholders:
 - six industry associations
 - two Industry Funding Organization/Industry Stewardship Organization (ISO/IFO) stakeholders, two consultants, and one Environmental Non-Governmental Organization (E-NGO).
- Registrant interviews included:
 - 13 producers
 - 12 service providers
 - 6 municipalities
 - 3 PROs.

Summary of Key Findings From In-Depth Stakeholder Interviews

At a high level, the key findings from the interviews are:

- Most reported positive interactions with RPRA.
- There are variable levels of familiarity with RPRA ranging from moderate to high
- Mixed and polarized perceptions of RPRA with negative impressions aggregated with Producers. Service Providers. Municipalities and PROs impressions ranged from neutral to highly favourable
- Many respondents expressed frustrations with the transition – not with RPRA but rather the fact that they were required to make the transition. A number of stakeholders felt unprepared for the change.
- Concerns about transition notwithstanding, the mandate and key concepts (IPR, Circular Economy) were well received and generally supported.
- Most respondents who had registered report favourably on the process and say that it was easy
- Respondents report generally positive or adequate experience with Compliance and Registry Officers (CROs).
- Respondents found the Registry to be easy and straightforward to use
- Most said they understand the regulatory requirements and what is required of them
- All agreed that RPRA's communications materials were helpful and at about the right level
- Virtually all respondents' overall ratings of their interactions with RPRA are positive. Typical responses point to courteousness and professionalism, responsiveness, being knowledgeable, and also attentive
- Virtually all Tires program respondents agree that the fees charged by RPRA are fair and reasonable.

Phase 2: Baseline Survey Methodology

- The objective of the baseline survey was to provide solid foundation on which to track future performance.
- Baseline focuses on Tire Registrants.
- Survey will be used to measure performance for new (future) registrants and track existing registrants.
- Baseline survey took place between November 11 and December 3, 2019.
- Respondents received an initial email invitation followed by two weekly email reminders. All stakeholders contacted for the survey also received an advanced communication from RPRA informing them of the survey.
- In total, 368 responses are included in this report. The margin of error is +/- 5.0 per cent, 19 times out of 20.
- Response rate is lower than expected (6% vs. 15% to 20%). This is due to the early stage of stakeholder lifecycle and low levels of engagement and familiarity with RPRA.
- Sample includes: 80% collectors, 21% producers, 7% service providers and 1% PROs. Each of the latter three groups are over-represented in the sample (the population is 94%, 7%, 3% and 0%, respectively).

Summary of Key Findings From Baseline Survey

At a high level, the key findings from the baseline survey are:

- Responses are consistent across registrant types
- Fair bit of polarization and fence sitting among stakeholders reflecting overall low level of familiarity with RPRA and many reserving judgement
- Stakeholder frustration with transition itself (government policy, not RPRA) is likely colouring responses
- Confusion among stakeholders between RPRA and Producer Responsibility Organizations
- Many stakeholders' experience with RPRA is limited to registration. As a result, this strongly affects broader perceptions of RPRA.
- Support for RPRA's mandate is reasonably strong and concepts statements on IPR and CE resonate well.
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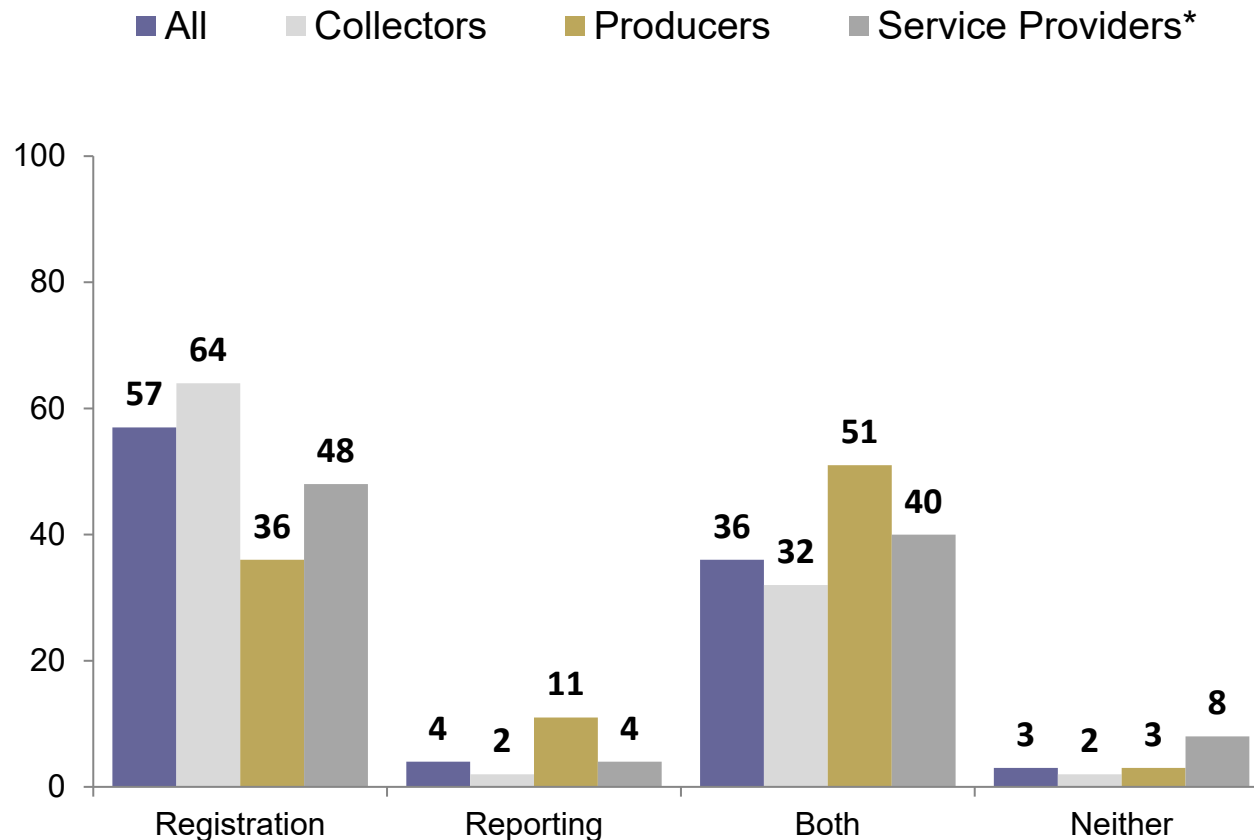
Registration and Reporting

The Initial Experience with RPRA

- In-depth interviews conducted prior to survey revealed some stakeholders displeased with transition to new system and processes.
- This appears to translate into negativity regarding registration and new reporting processes.
 - About half rate registration process positively, with one quarter rating it negatively. This is consistent across different stakeholder groups (albeit, directionally, service providers appear more positive).
 - Over one-third rate reporting experience positively. This is also consistent across stakeholder groups.
- Reflecting concerns about transition, over a third rate RPRA poorly on helping them understand how transition might affect their businesses, while one half say they would have liked to have heard more from RPRA during transition process.

Registration and Reporting Experience

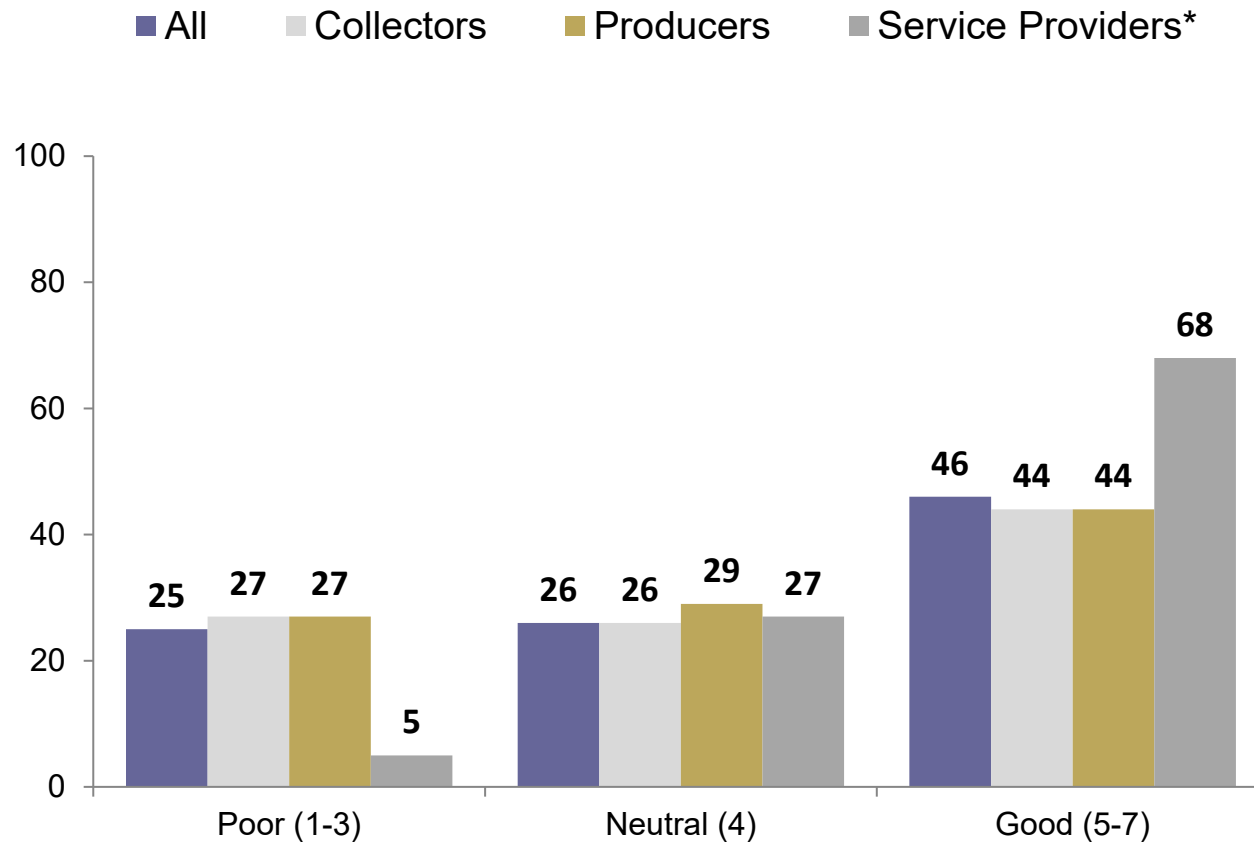
Were you personally involved in registering and/or reporting for your company with RPRA?



- › Overall, only a few stakeholders say they were not involved in either reporting or registration.
 - 93% were involved in registration
 - 40% were involved in reporting
- › Regardless of stakeholder group, the vast majority were involved in registration.
- › Involvement in reporting varies, however:
 - Producers: 62%
 - Collectors: 34%
 - Service providers: 44%
- › This indicates confusion among stakeholders, likely between role of RPRA and PROs since only producers have reported to RPRA to date.

Rating of Registration Experience

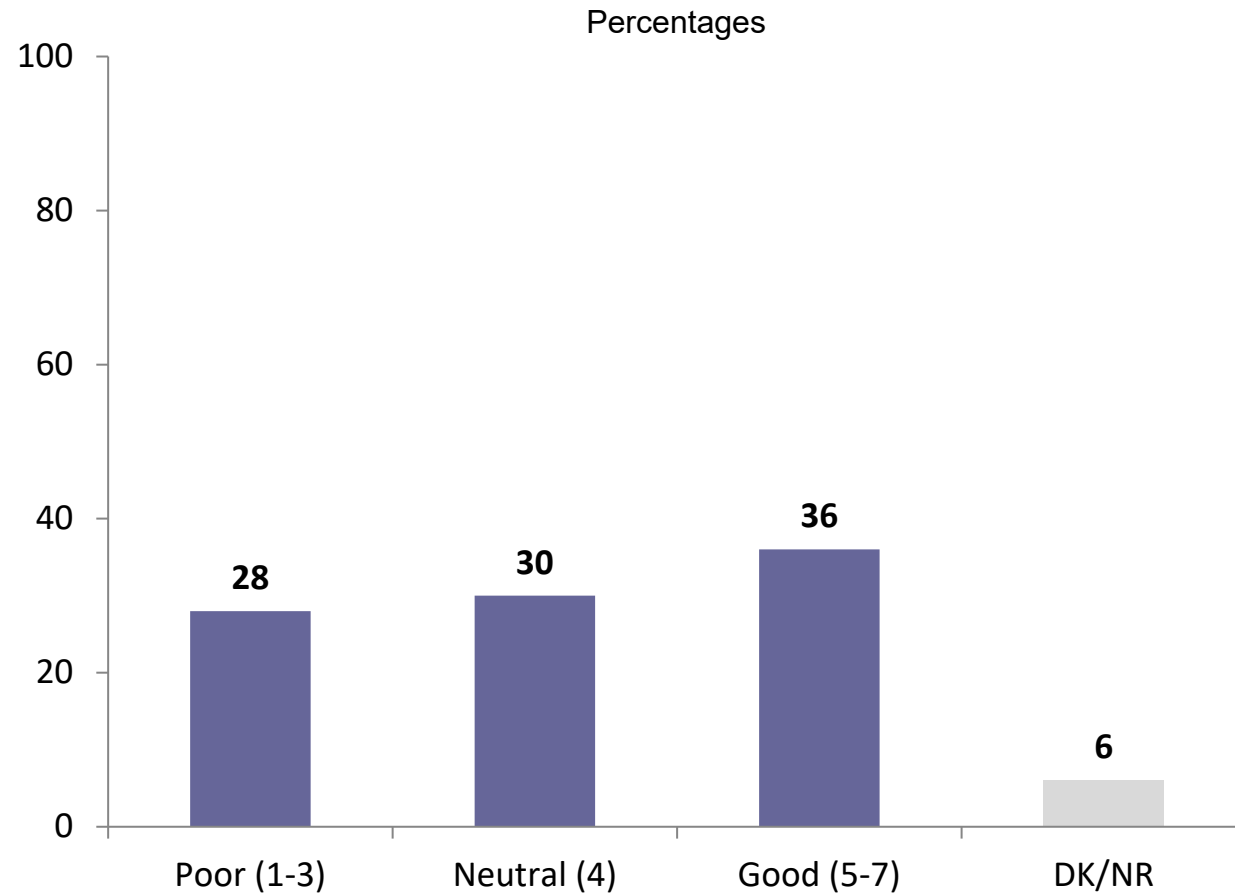
Overall, how would you rate your experience of registering with RPRA?



- › Overall, about half rate their registration experience positively and fully one quarter rate it negatively.
- › Collectors and producers rate their experience very similarly.
- › Service providers appear to rate registration more positively than others, but this is a small subsample and not statistically significant.

Rating of Reporting Experience

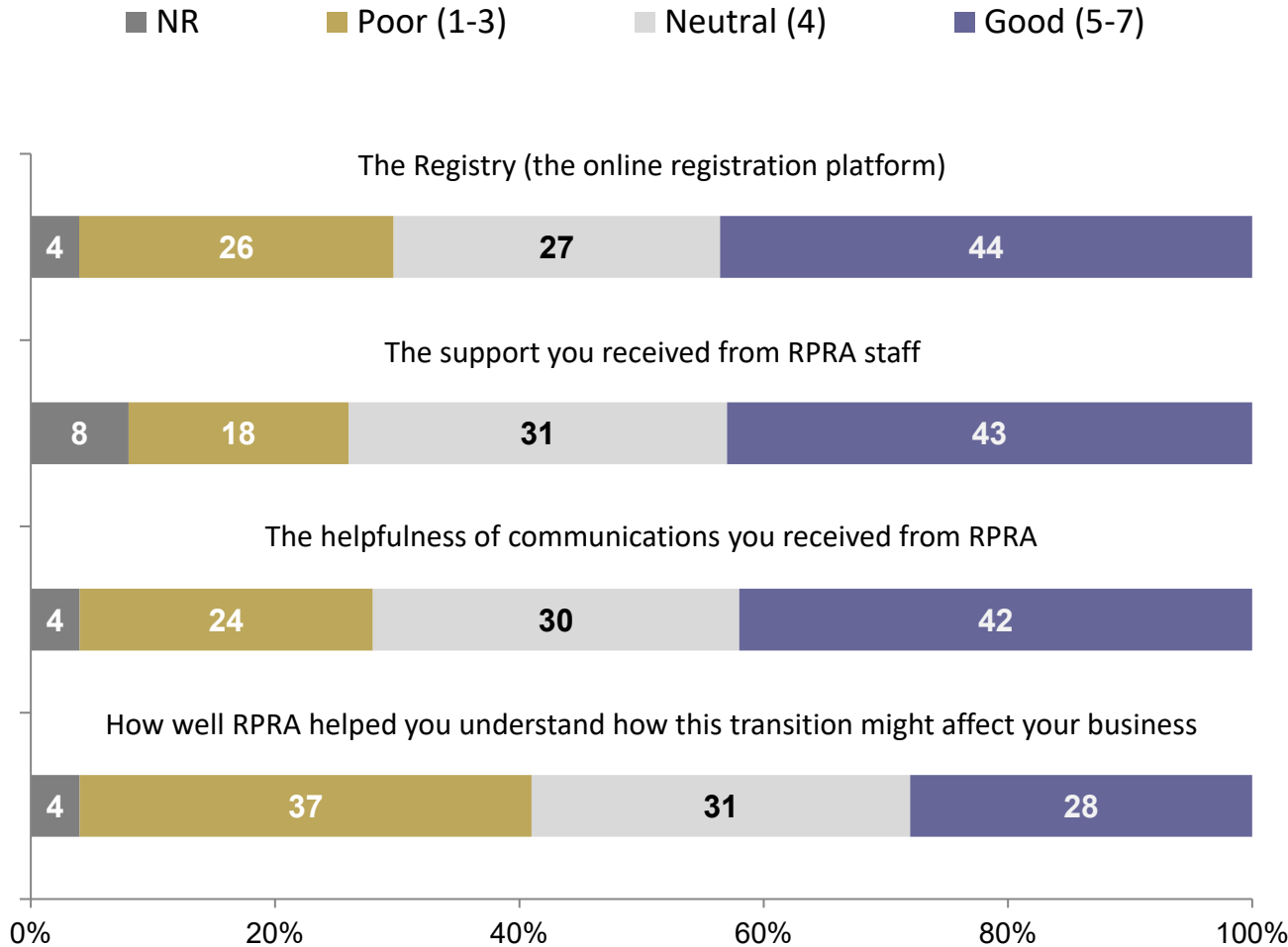
Overall, how would you rate your company's reporting experience with RPRA?



- › Over one-third rate their reporting experience positively, while 1 in 5 rate it negatively.
- › Importantly, many of these ratings may not pertain to RPRA, as some stakeholders conflated RPRA with PROs.

Rating Various Dimensions of Registration

How would you rate each of the following dimensions of the transition and registration process?



- > Rating for various dimensions of registration varies somewhat but reflects the overall rating of stakeholders' registration experience.
- > The Registry, support and communications are all rated similarly with just over 2 in 5 positive.
- > Ratings for how well RPR helped stakeholders understand how transition affects their businesses is rated more poorly.
 - This fits with concerns expressed during in-depth interviews – a number of stakeholders expressed frustration about the change itself.

Understanding of and Support with Reporting

How strongly do you agree or disagree with each of the following?

■ NR ■ Disagree (1-3) ■ Neither (4) ■ Agree (5-7)

I would have liked to hear more from RPRA during the transition and registration process



My company understands what is required for reporting with RPRA



When needed, RPRA has provided good support to help us fulfill our reporting requirements



- › Half of stakeholders would have liked to have heard more from RPRA on transition and registration.
- › Fewer than half of stakeholders say they understand what is required for reporting, while over a third say RPRA has provided good support.

0% 20% 40% 60% 80% 100%

Interaction and Familiarity with RPRA

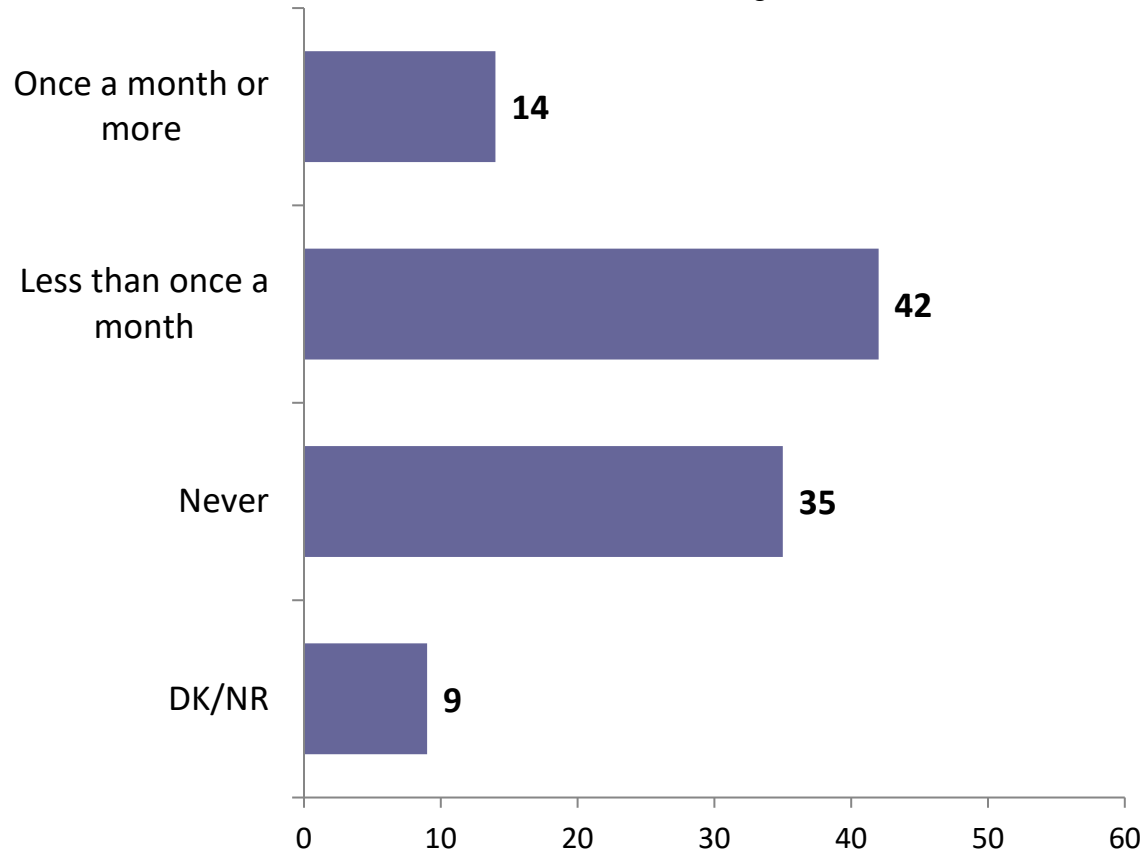
Interaction and Familiarity with RPRA

- Interaction with RPRA since registration has been limited.
 - About 1 in 5 have had monthly or more frequent interaction with RPRA since registration.
 - About one-third have had no interaction since their initial experience, although this varies somewhat by stakeholder group.
- Post-registration contact is mostly by email/phone. Few visit the website.
- About two-thirds either can't recall interaction with RPRA staff or report none.
- Reflecting the low level of post-registration interaction, there is low familiarity with RPRA and the key terms of IPR and Circular Economy.
 - Also reflecting interaction, familiarity varies by stakeholder group.

Stakeholders' Interaction with RPRA is Low

Since completing registration, on average, how often have you had contact with RPRA in the last year (either by telephone, email, postage mail, online or in-person)?

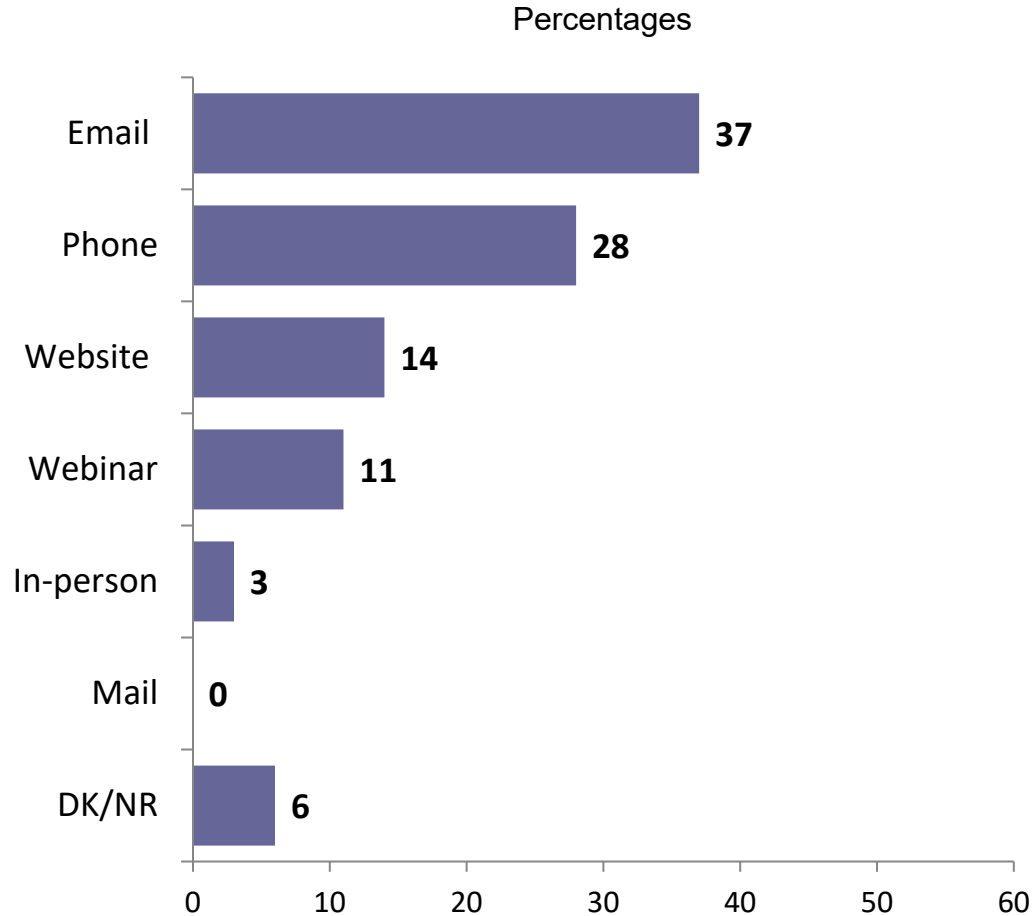
Percentages



- › About one-third of stakeholders have had no contact with RPRA since registration.
- › This varies by stakeholder group:
 - 43% of collectors have had no post-registration contact, while this number is only 14% for producers and 20% for service providers.
 - That said, most producers and service providers (56%) have had less than once a month contact.

Post-registration Contact is Mostly by Email and Phone

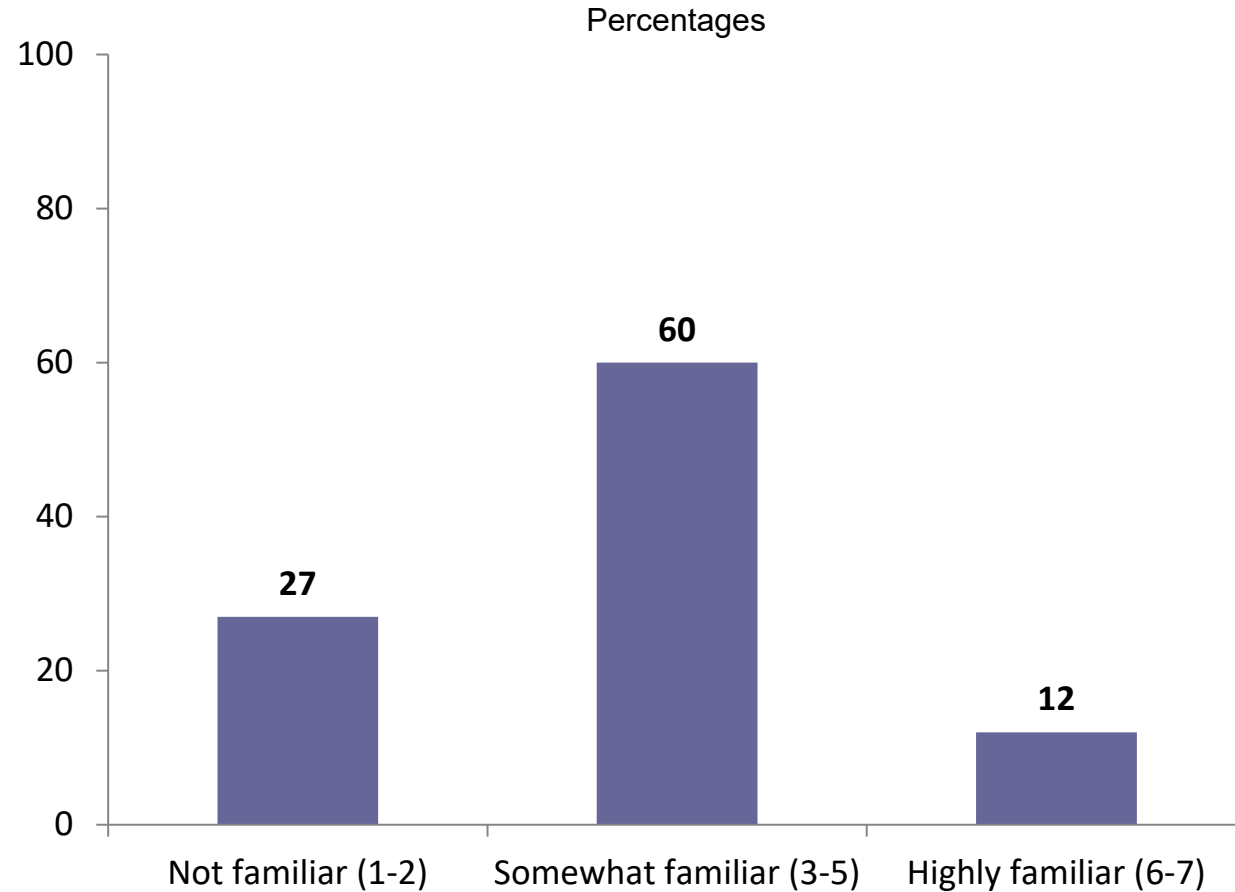
Thinking of the contact you have had with RPRA over the past year, which of the following methods did you use to interact with RPRA?



- › Email and phone are the most popular channels for contact with RPRA
- › Website usage is reserved to a fairly small minority
- › Webinar/in-person attendance is at the same level as website visits.

Familiarity with RPRA is Low

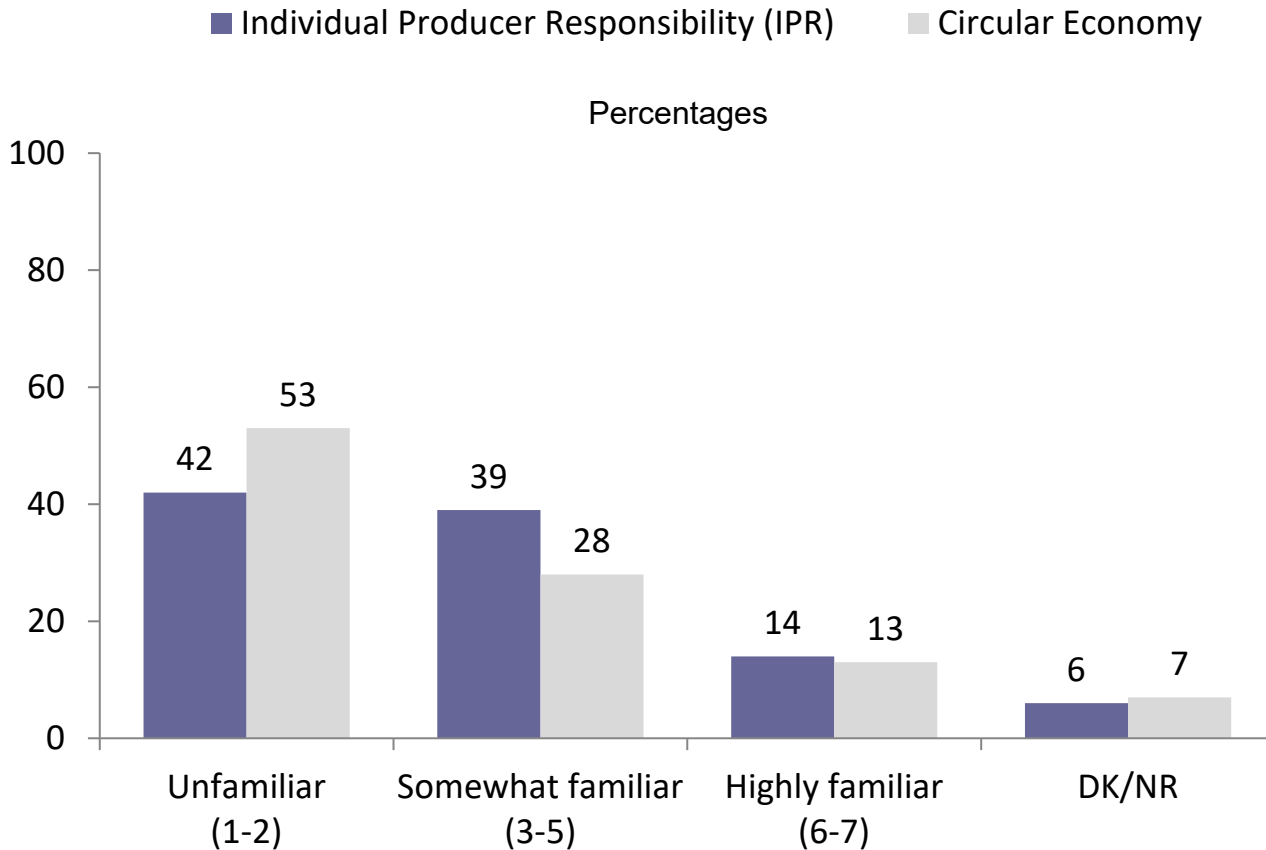
How familiar are you with RPRA?



- › Familiarity is very low for a stakeholder group with just over 1 in 10 saying they are highly familiar with RPRA.
- › Familiarity is lowest with collectors (just 7% highly familiar). Familiarity with producers and service providers is *directionally* higher (19% and 28%, respectively).

Familiarity with the Terms IPR or CE is also Low

How familiar are you with each of the following?



- › Like familiarity with RPRA itself, stakeholders are largely unfamiliar with the key terms of IPR and Circular Economy.
- › This varies by stakeholder group:
 - For instance, high familiarity with IPR is lowest among collectors (7%) and higher with both producers (23%) and service providers (44%)

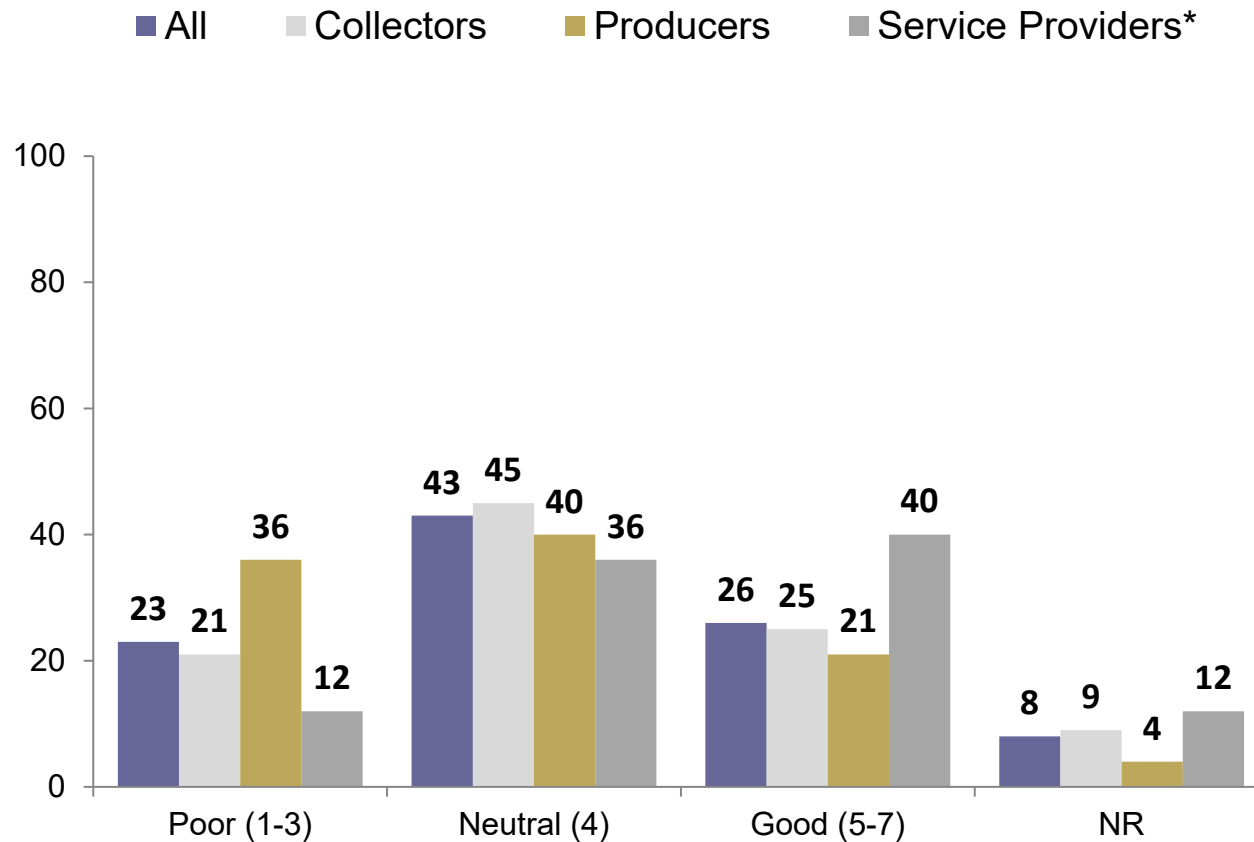
Perceptions of RPRA

Perceptions of RPRA

- Perceptions of RPRA correlate strongly with stakeholders' registration experience/frustration with transition.
- While general impressions of RPRA are polarized and with a high number of fence-sitters, this varies greatly depending on their registration experience.
 - About two-thirds of those with a poor registration experience have a negative impression of RPRA.
- Support for RPRA's mandate is reasonably strong and concepts statements on IPR and CE resonate well.
 - While this is consistent across stakeholder groups, registration experience is also important here.

Overall Reputation

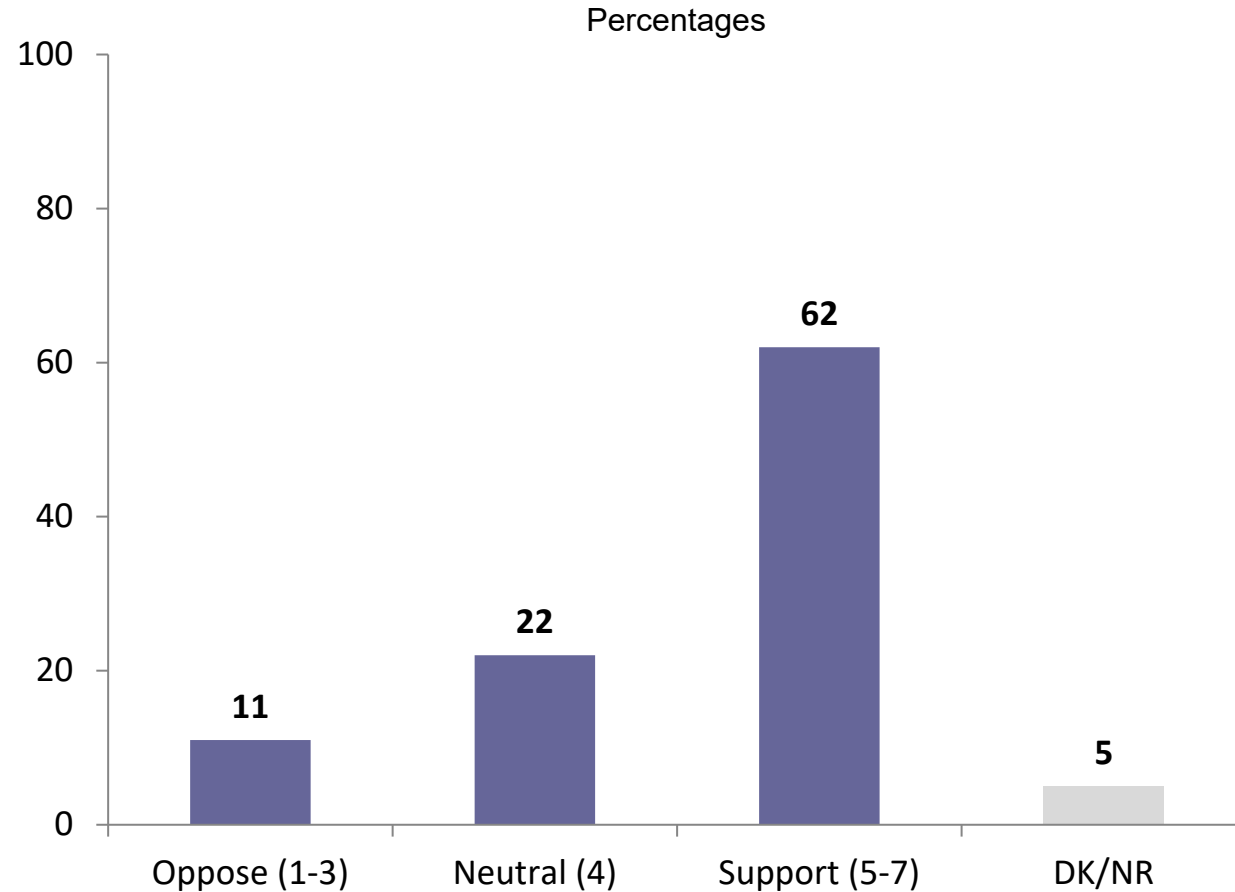
Overall, based on everything you may have seen or heard, what is your general impression of RPRA?



- › Overall, reputation is polarized with a large number of fence sitters.
- › Producers are significantly more negative than other stakeholder groups, reflecting findings from the in-depth interviews.
- › The numbers on overall reputation reflect those for registration and transition.
 - 62% of those who rate their registration experience negatively also say their impression of RPRA is negative.
 - Conversely, just 6% of those who rate their registration experience positively also have a negative impression of RPRA.

Support for RPRA's Mandate

How strongly do you support or oppose this mandate?

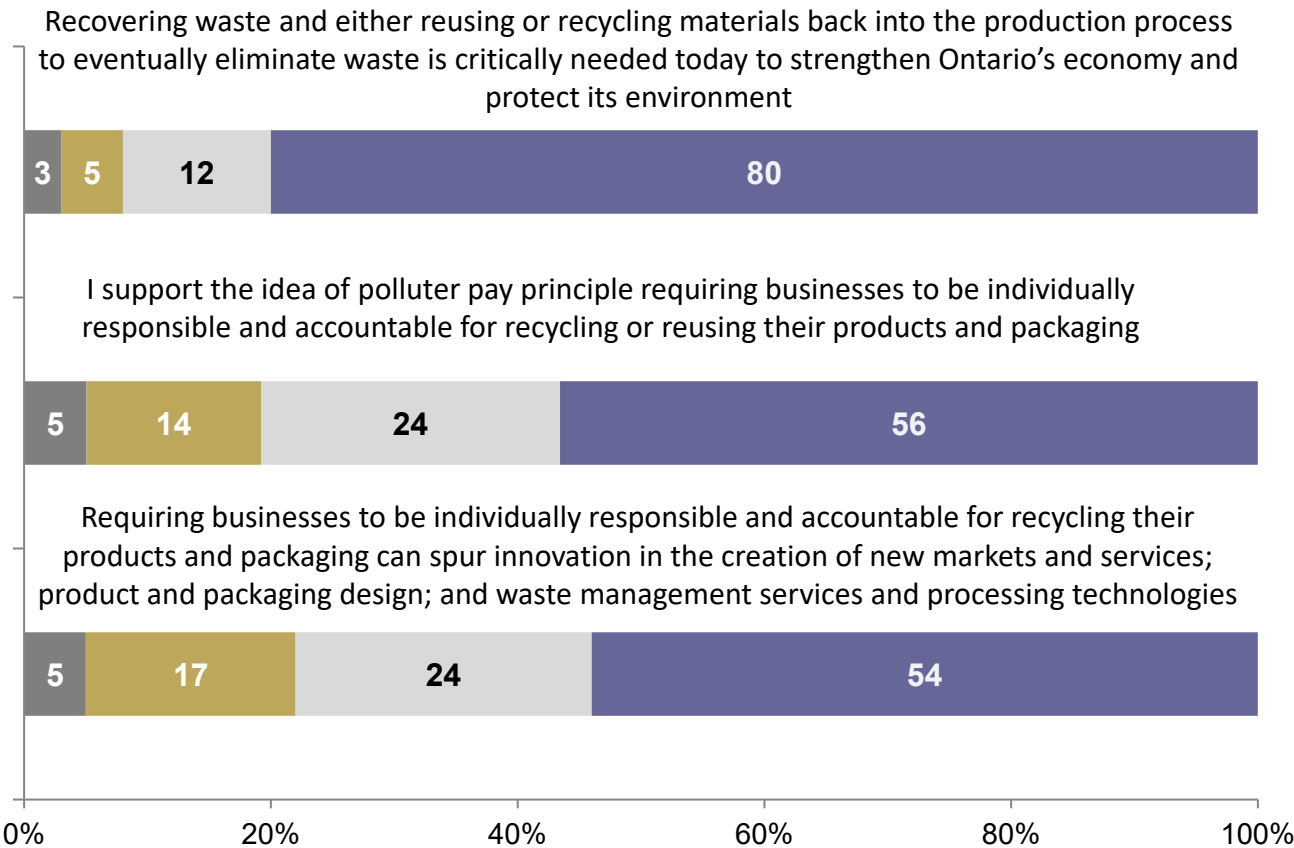


- › While overall impressions of RPRA are polarized and uncertain, there is reasonably strong support for its mandate.
 - This result is consistent across stakeholder groups
- › Support for the mandate correlates strongly with stakeholders' registration experience.
 - Support increases progressively with rating of the registration experience from 43% for those with a poor registration experience to 81% for those with a positive experience.

Concepts Statements on IPR and CE Resonate

How strongly do you agree or disagree with each of the following?

■ NR ■ Disagree (1-3) ■ Neither (4) ■ Agree (5-7)



- › Overall, each of the key concepts – CE, IPR and IPR spurring innovation – resonate reasonably well with stakeholders.
 - Only small minorities are offside in each instance.
- › The concept of a circular economy resonates much more strongly than the others, however, with fully 8 in 10 in agreement.
- › These results do not vary significantly by stakeholder groups.

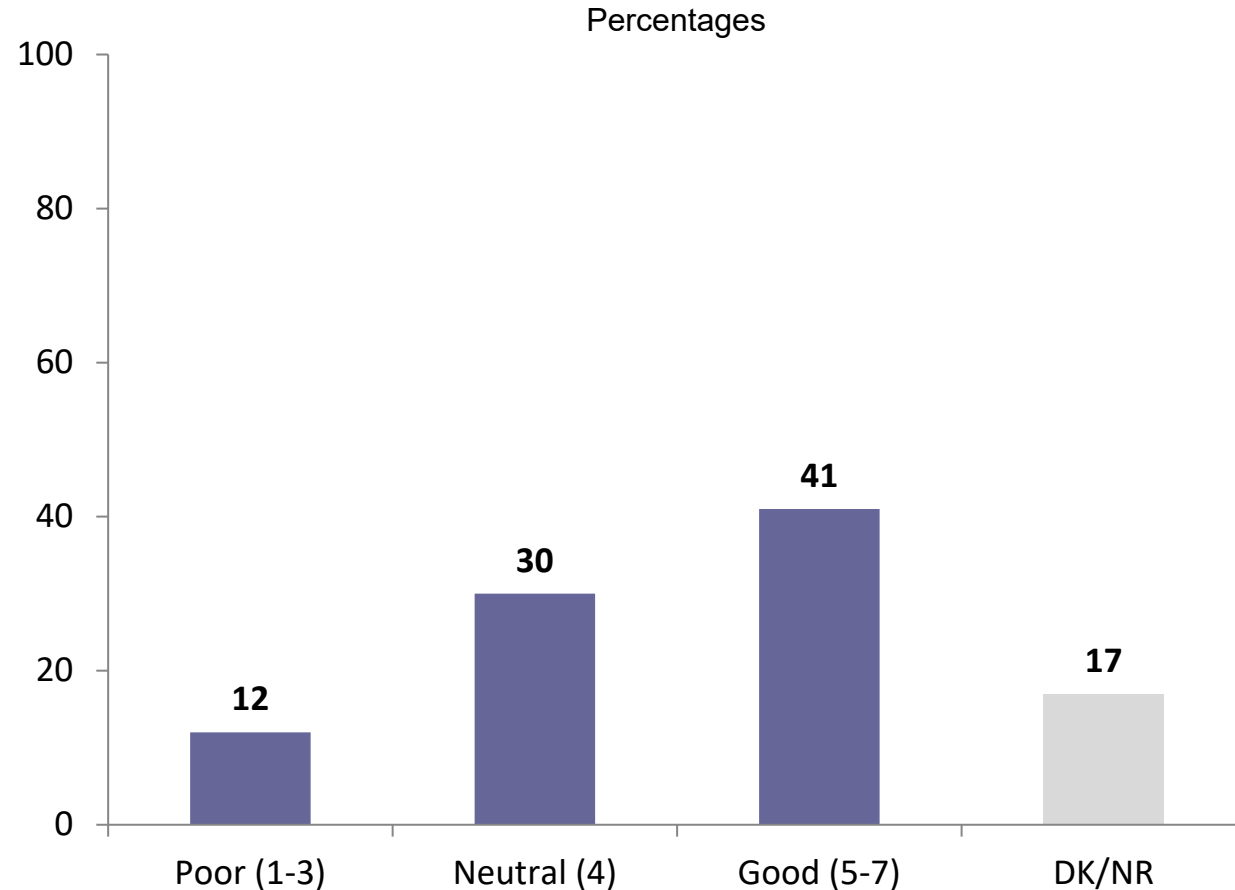
Performance and Expectations

Performance and Expectations

- RPRA's performance on a range of attributes and dimensions is very similar to its reputation with a positive lean and a fair degree of fence-sitting.
- Also consistent with other findings, there is a strong correlation with performance ratings and stakeholders' registration experience.
- Stakeholders are positive about RPRA's performance on its mandate, with a large number of neutrals.
- Gap analysis between expectations and performance reveals that RPRA performs well on the top dimension (courteousness and professionalism) but has work to do in a number of other areas (particularly understanding stakeholder needs and communications).
- Stakeholders are both polarized and fence sitting on a range of performance attributes.
 - One third or fewer agree with statements about support, communications, role adherence, transparency and ensuring a level playing field.
 - Many stakeholders are sitting on the fence with large numbers of neutrals and non-response.

RPRA's Performance on its Mandate

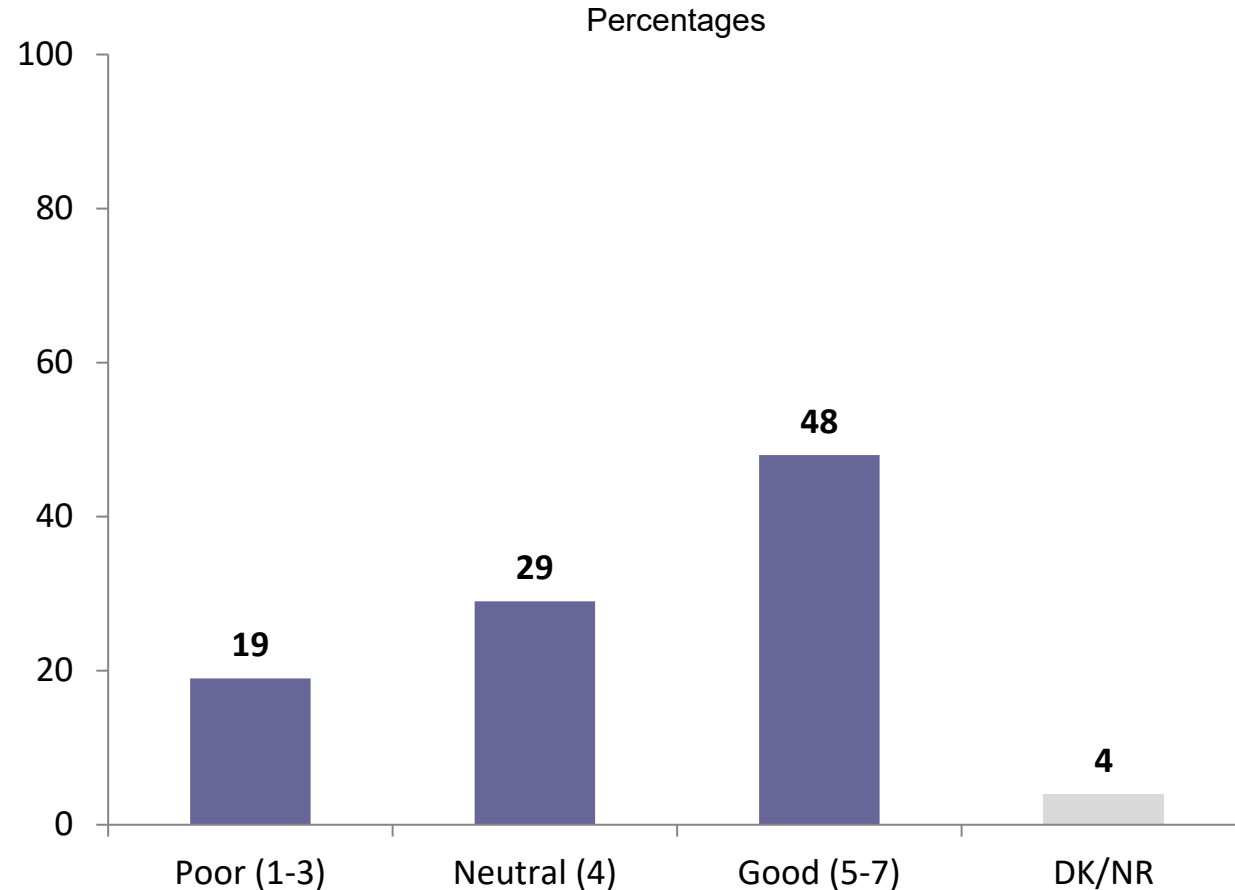
Based on everything you may have heard or seen to date, how would you rate RPRA in terms of fulfilling its mandate?



- › About half of stakeholders say that RPRA has been effective in executing its mandate.
- › Slightly more than 1 in 10 rate RPRA poorly on this dimension, while almost half are sitting on the fence (neutral or non-response), reflecting the early stage of things.
- › This result also correlates strongly with registration experience:
 - Just 4% of those with a poor registration experience rate RPRA positively, while 73% of those with a positive experience do likewise.

Overall Rating for Interactions with RPRA

Thinking about the interactions you have had with RPRA to date, including during the registration process and afterwards, how would you rate these interactions overall?

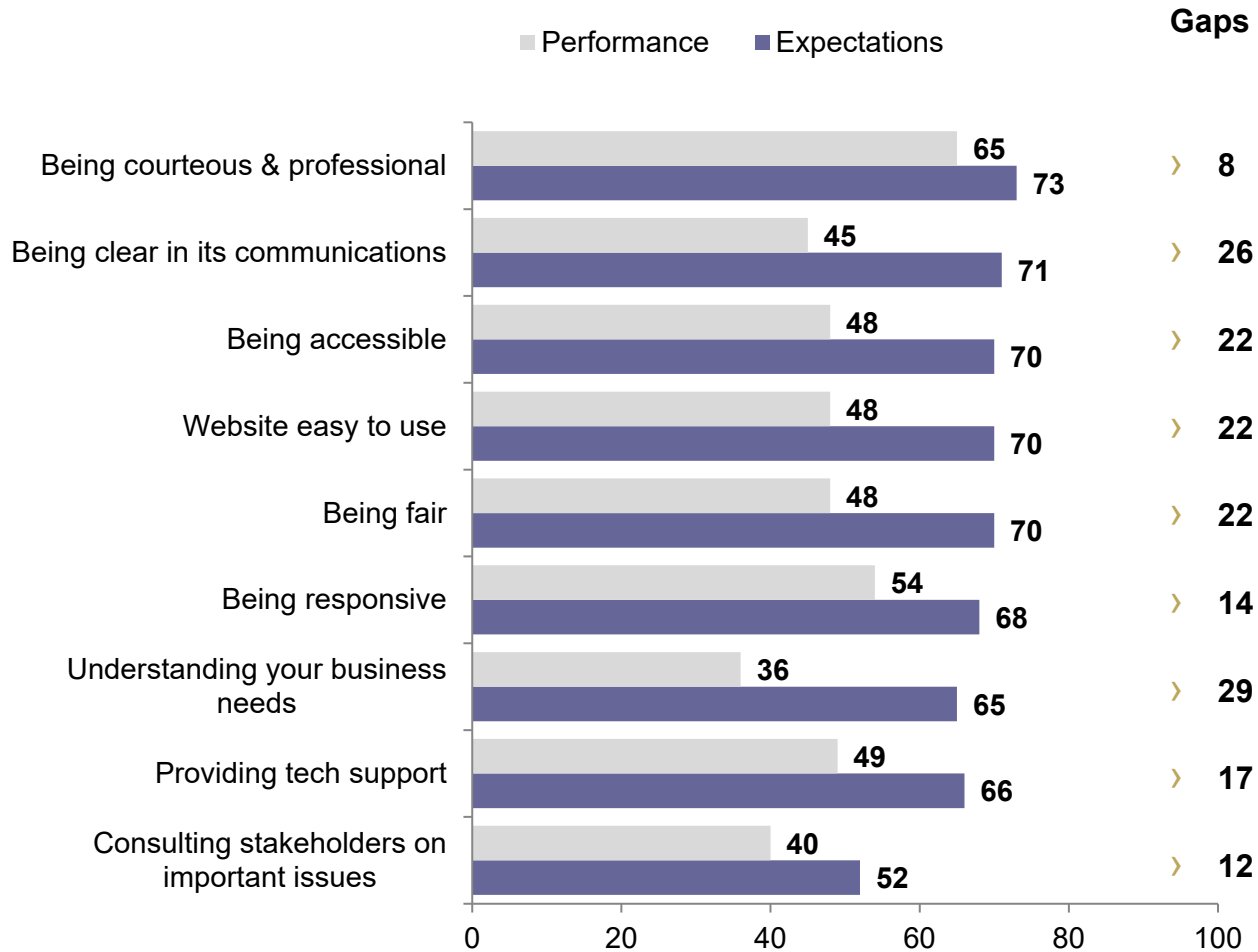


- › Overall ratings for interactions with RPRA lean positively with a somewhat notable negative number.
- › This result is largely consistent across stakeholders (although collectors appear to be less positive but not more negative – a slightly higher neutral at 33%)
- › Rating of interactions is strongly correlated with registration experience.
 - While just 7% of those rating their registration experience negatively also rate their overall interaction positively, this increases to 85% for those who had a positive registration experience.

Expectations vs. Performance: Gap Analysis

Expectations: How important are each of the following when dealing with RPRA?

Performance: Still thinking about your interactions with RPRA, how would you rate your experience across the following dimensions?

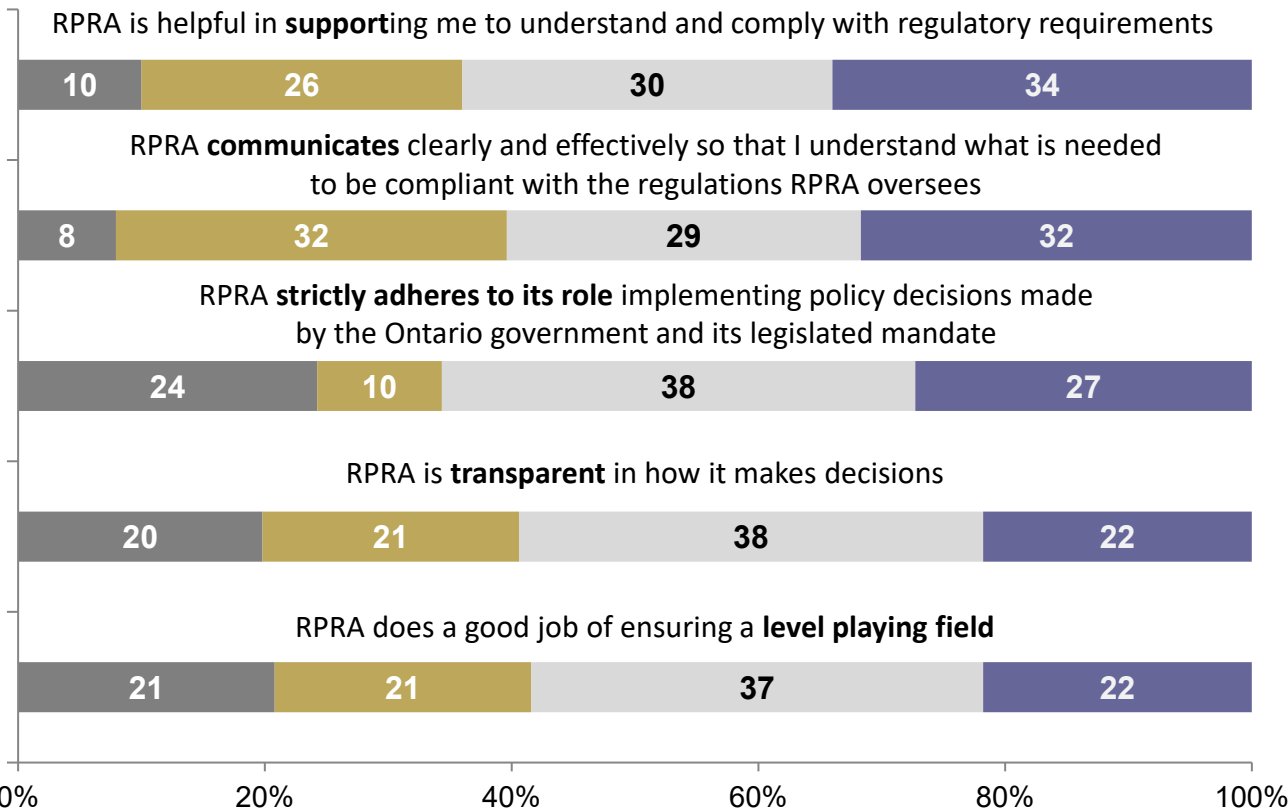


- > The largest gaps are in understanding stakeholders' businesses and communications
- > Website ease of use, being accessible and fair are also high priority areas.
- > These results are generally consistent across stakeholder groups with some exceptions:
 - On performance, collectors are less positive than others, although not more negative.
- > All of the performance measurements correlate very strongly with registration experience.

Key Attitudes towards RPRA

How strongly do you agree or disagree with each of the following?

■ NR ■ Disagree (1-3) ■ Neither (4) ■ Agree (5-7)



- › Results for transparency, communication around compliance, adhering to its role and ensuring a level playing field are broadly consistent with other findings in the survey (polarized with a large number of fence-sitters).
- › These results are consistent across stakeholder groups.
- › Like virtually all other findings in the survey, these results correlate strongly with registration experience.
 - For instance, 69% of those with a negative registration experience disagree that RPRA’s support is helpful, while 60% of those with a positive registration experience agree.

RPRA's Fees and Response Time

RPRA's Fees and Response Time

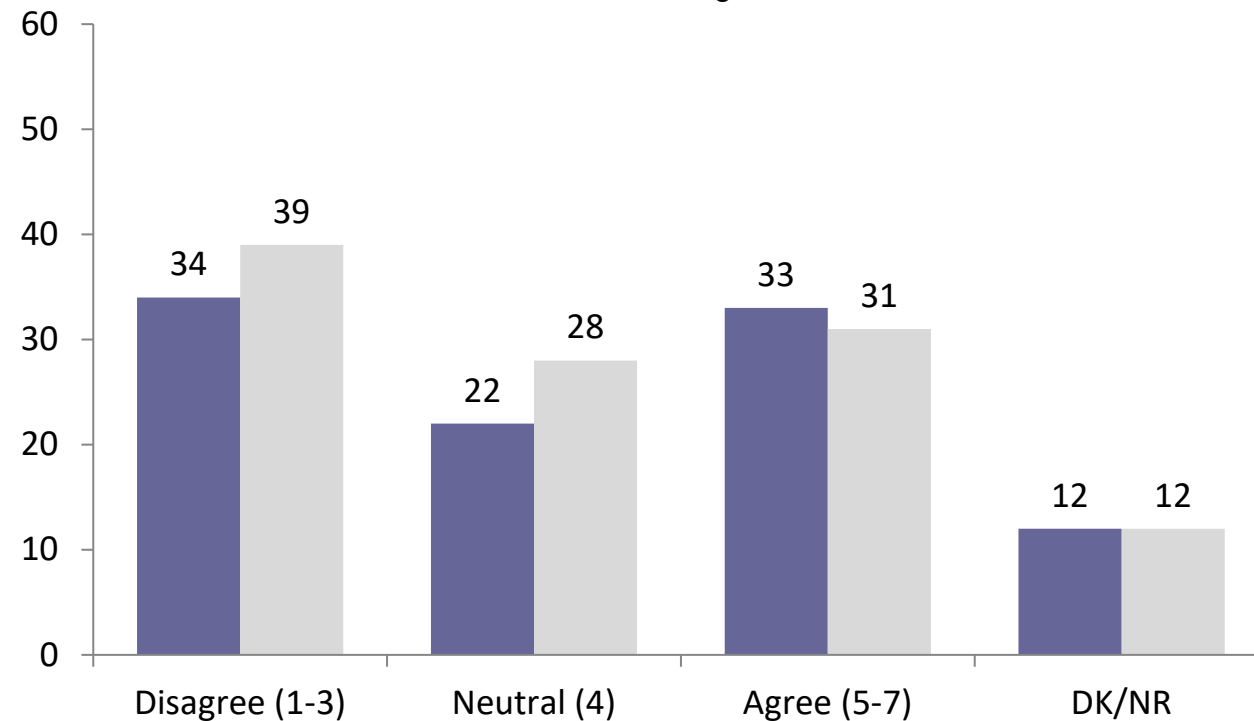
- Fee-paying stakeholders are polarized on both understanding how fees are set and whether those fees are fair and reasonable.

Fees

Finally, how strongly do you agree or disagree with each of the following statements?

■ I understand how RPRA's fees are set ■ RPRA's fees are fair and reasonable

Percentages



- › Fee-paying stakeholders are split between those who understand how fees are set and those who do not.
- › These stakeholders are almost as likely to disagree that fees are fair and reasonable as agree.

Key Takeaways

Findings:

- High stakeholder frustration and negativity with transition (government policy), which appears to be (mis)directed at RPRA
- Tire stakeholders appear confused about changes affecting their businesses, e.g., confusion between RPRA and PROs
- Low familiarity with RPRA, reflective of the early stage of the Authority and new regulatory framework as well as low levels of post-registration interaction
- Stakeholder perceptions about RPRA are polarized with many sitting on the fence and reserving judgment
- Stakeholder perceptions about RPRA are largely consistent across different registrant types
- Overall support for RPRA mandate and CE and IPR concepts among stakeholders
- Positive RPRA registration experience is key to influencing stakeholder perceptions about RPRA

Learning:

- Important to clarify stakeholder confusion between RPRA and PROs
- Stakeholders are seeking more proactive communications to help prepare them for transition
- Clear and plain language explanation of CE and IPR concepts is needed, seek to avoid jargon or technical language
- Important for RPRA to reflect better understanding of business needs of registrants

Modus

R E S E A R C H

Real Respondents, Real Insight