



2021 RPRA REGISTRANT PERCEPTION SURVEY

FINAL REPORT



January 2022



Introduction

This report provides the in-depth findings for the 2021 RPRA stakeholder surveying of Tires, Batteries and Electronics registrants. Two surveys were conducted in 2021 – a tracking survey for Tires and a baseline survey for Batteries and Electronics. This report presents these findings along with the 2019 baseline findings for the Tires group.

Results for the Tires baseline survey differ from those presented in 2019. It was decided, based on their low level of interaction with RPRA, that collectors would be excluded from future surveying of RPRA registrants. To enable an apples-to-apples comparison of the 2019 survey data with that for 2021, the baseline data was recalibrated with collectors excluded.

Organization of the Report

The report is organized thematically with survey findings presented in order of importance. The report begins with a high-level overview of the findings, followed by thematic chapters, each with a key findings section at the front.

Results do not always add up to 100% due to rounding and/or exclusion of non-response.

Unless otherwise noted, there is no statistically significant differences between Batteries and Electronics.

Survey data is analysed in two key ways:

- Tracking changes between 2019 and 2021 for Tires and comparing each with the baseline findings for Batteries and Electronics.
 - Subgroup analyses of each survey dataset (e.g., service providers vs. producers). These analyses are limited by the overall sample sizes for each survey. Where statistically significant results are found, they are noted on each slide.
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Methodology

- The tracking data presented in this report are based on surveying 130 Tires Registrants online between September 29 and November 19, 2021. In total, 818 stakeholders were invited to participate, resulting in a response rate of 16 per cent. The margin of error for these data is +/- 7.9% at a 95 per cent confidence interval.
 - The overall sample for Tires can be broken down by registrant type as follows (there is some overlap between these groups):
 - Producers (100), Haulers (29), PRO (7) Processors (2), Retreaders (2).
 - In 2019, collectors were included in the Tires baseline survey sample. The baseline data presented in this report excludes collectors to ensure proper apples-to-apples comparison.
 - For Batteries and Electronics, 96 stakeholders we surveyed between November 16 and December 12, 2021. In total, 645 stakeholders were invited to participate, resulting in a response rate of 15 per cent. The margin of error for these data is +/- 9.2% at a 95 per cent confidence interval.
 - The overall sample for Batteries and Electronics can be broken down by registrant type as follows (there is some overlap between these groups):
 - Producers (79), Haulers (12), PRO (8), Refurbisher (6), Processor (5)
 - The response rate to each survey are strong. For instance, typical banking CRM online surveys generate 1 to 2 per cent response rates.
 - Respondents received an initial email invitation followed by two email reminders and were able to complete the survey online or via mobile. All stakeholders contacted for the survey also received an advanced communication from RPRA informing them of the survey.
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Overview of Key Findings

Overall, results from the 2021 stakeholder surveys are positive relative to the 2019 baseline survey, RPRA showing notable improvement in a number of areas.

Relative to similar organizations, RPRA's performance is difficult to benchmark, as other delegated authorities with a regulatory and enforcement role are well established with longstanding stakeholder relationships. As a result, RPRA results have a relatively high level of neutrality, indicating many stakeholders have yet to make up their minds.

Based on our experience of working with other delegated authorities, it is our opinion that RPRA performs as well as, if not better than, comparable organizations at a similar stage of development.



Overview of Key Findings

Reputation

- › Although there are areas for improvement, RPRA has shown progress on tracking for every reputation and perception indicator
 - › A majority of stakeholders support RPRA's mandate.
 - › Over half feel that RPRA is a trusted authority.
 - › A majority of stakeholders also rate RPRA favourably on adhering to its role
 - › There are a number of areas that could see improvement, however: ensuring a level playing field; accountability to stakeholders, and; transparency.
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Overview of Key Findings (cont'd)

Performance

- Overall, RPRA's performance metrics are solid and often improved over 2019, with some notable areas requiring attention.
 - In some key areas of performance, RPRA is performing well and improving noticeably.
 - A solid majority now rate RPRA positively on fulfilling its mandate.
 - Strong majorities rate RPRA positively on compliance support metrics.
 - Performance on a range of attributes shows general consistency with past measurement and that Batteries and Electronics are generally more favourable toward RPRA than Tires.
 - Gap analysis between expectations and performance reveal the following priority areas for stakeholder relations:
 - Understanding stakeholders' business needs
 - Fairness
 - Tech support
 - Clarity of communications
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Overview of Key Findings (cont'd)

Stakeholder Understanding and Messaging

- › Stakeholder familiarity has improved modestly since 2019.
- › Batteries and Electronics report significantly higher familiarity than Tires with Individual Producer Responsibility (IPR) and circular economy (CE). As in 2019, these resonate well with stakeholders.
- › The idea that the new producer framework reduces red tape is met with significant resistance.

Communications

- › There is fairly widespread usage of RPRA's communications products, particularly among Batteries and Electronics registrants.
 - › Ratings for each of the communications products are strong.
 - › Batteries and Electronics registrants are generally more positive about consultations than Tires.
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Overview of Key Findings (cont'd)

Reporting

- › Stakeholders rate various dimensions of the reporting process favourably, especially Tires registrants.
- › The time and effort required for stakeholders appears to be a pain point (and may be related to the negative feedback on red tape).
- › A majority of stakeholders find the Registry to be user-friendly.
- › Understanding of reporting requirements and support from RPRA on reporting have seen strong improvement over 2019 and solid majorities are affirmative on both counts.

Fees

- › Fee-paying stakeholder attitudes towards fees have improved since 2019.
 - › There remains, however, a sizable number who do not understand how fees are set.
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Detailed Survey Findings

Reputation and Perceptions of RPRA

Across almost every indicator on reputation and perceptions, RPRA has improved results on tracking and strong results overall.

- › A majority of stakeholders support RPRA's mandate.
- › Over half feel that RPRA is a trusted authority.
- › A majority of stakeholders also rate RPRA favourably on adhering to its role

There are a number of areas that could see improvement, however:

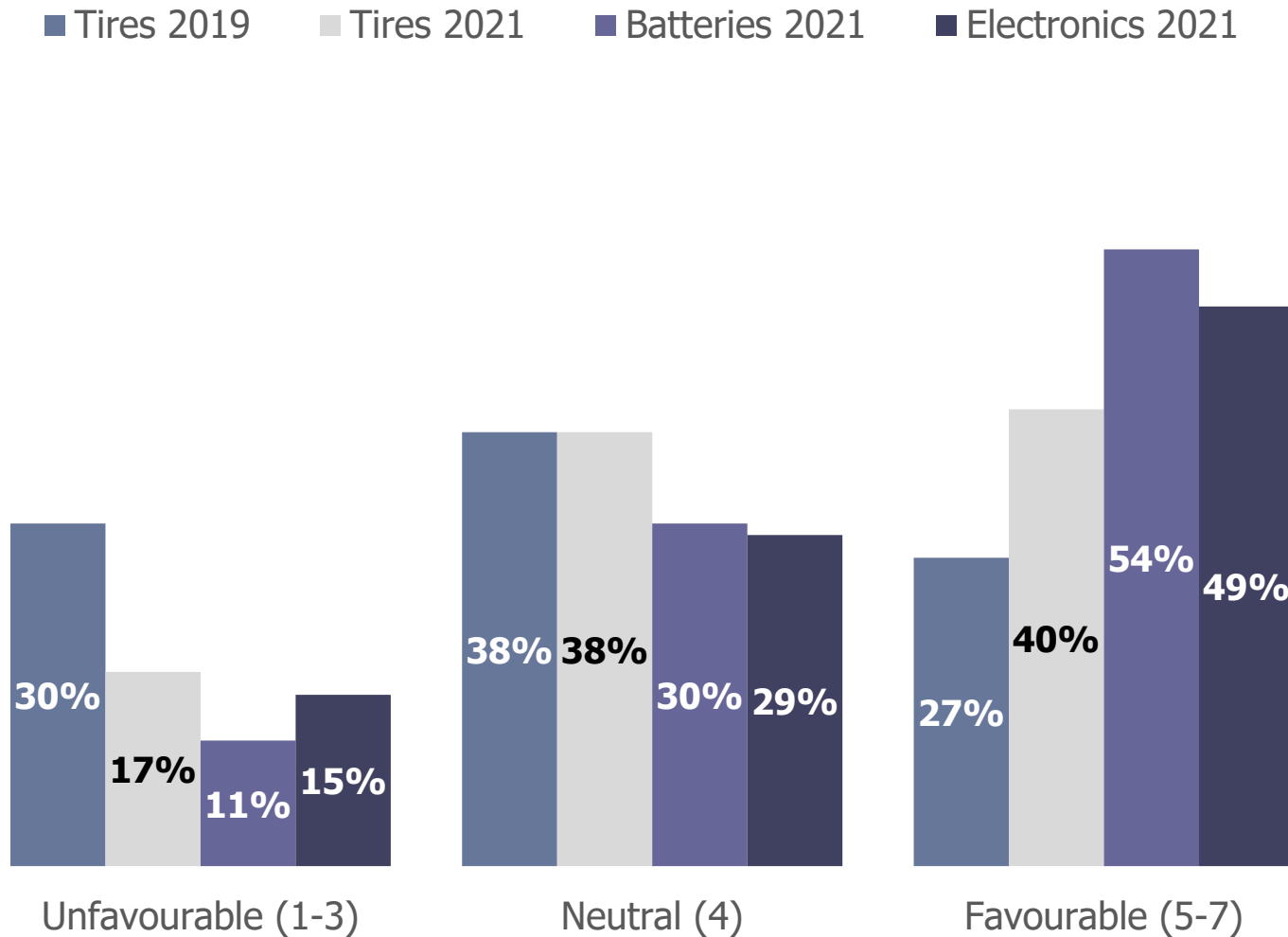
- › Ensuring a level playing field
- › Accountability to stakeholders
- › Transparency

Although there are areas for improvement, RPRA has shown progress on tracking for every reputation and perception indicator.



Overall Reputation

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



- › Batteries and Electronics show a more favourable impression of RPRA than Tires, especially relative to the 2019 baseline.
- › Notably, Tires and Batteries & Electronics have similarly low unfavourability numbers (roughly 1 in 6) in 2021.
- › Although Tires service providers have a significantly more positive impression of RPRA than do Tires producers (50 vs. 36 per cent favourable, respectively), this variation is not found for Batteries and Electronics.
- › Note: the difference between Batteries and Electronics is not statistically significant.

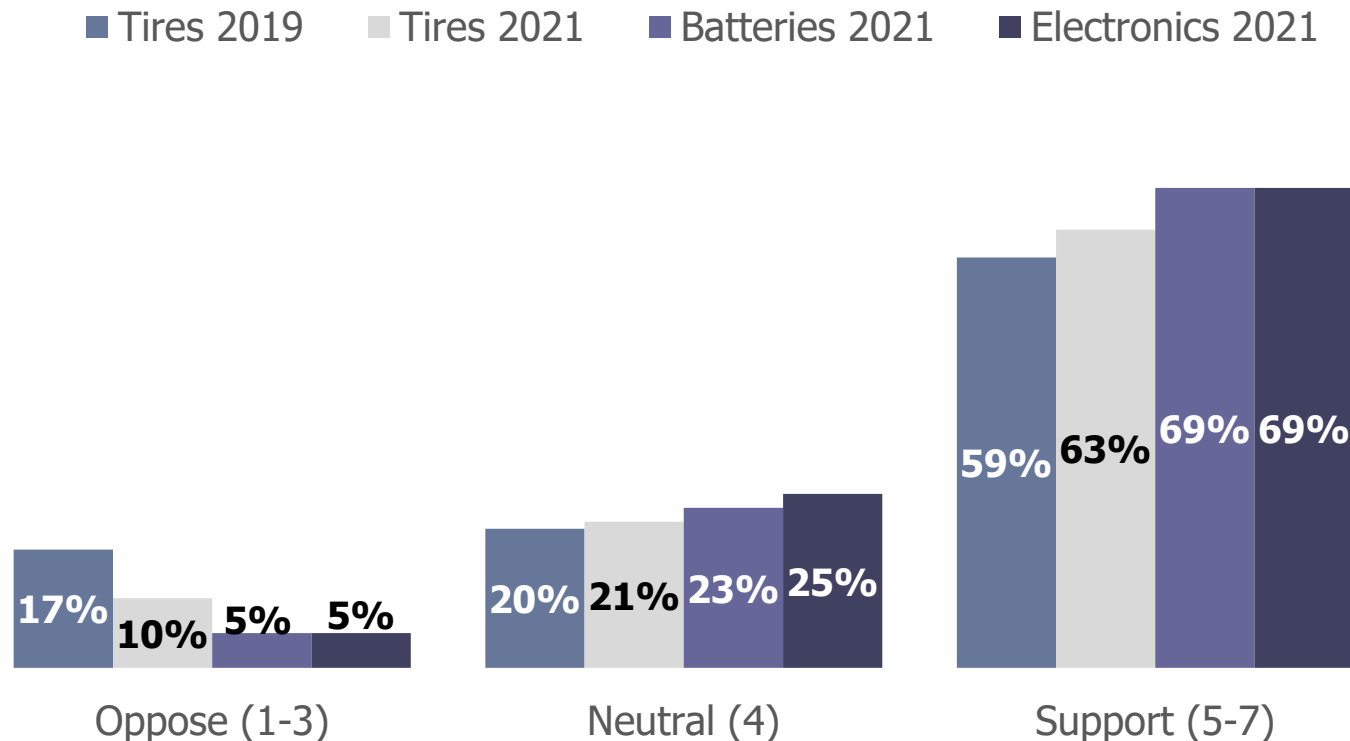


Support for RPRA's Mandate

The following is a statement of RPRA's mandate:

RPRA is the regulator mandated by the Government of Ontario to enforce the province's circular economy laws. Its primary role is to oversee the wind up of waste diversion programs operated by industry funding organizations and transition them to a new regulatory framework for recycling in which producers are responsible and accountable for their products and packaging at end of life.

How strongly do you support or oppose this mandate?



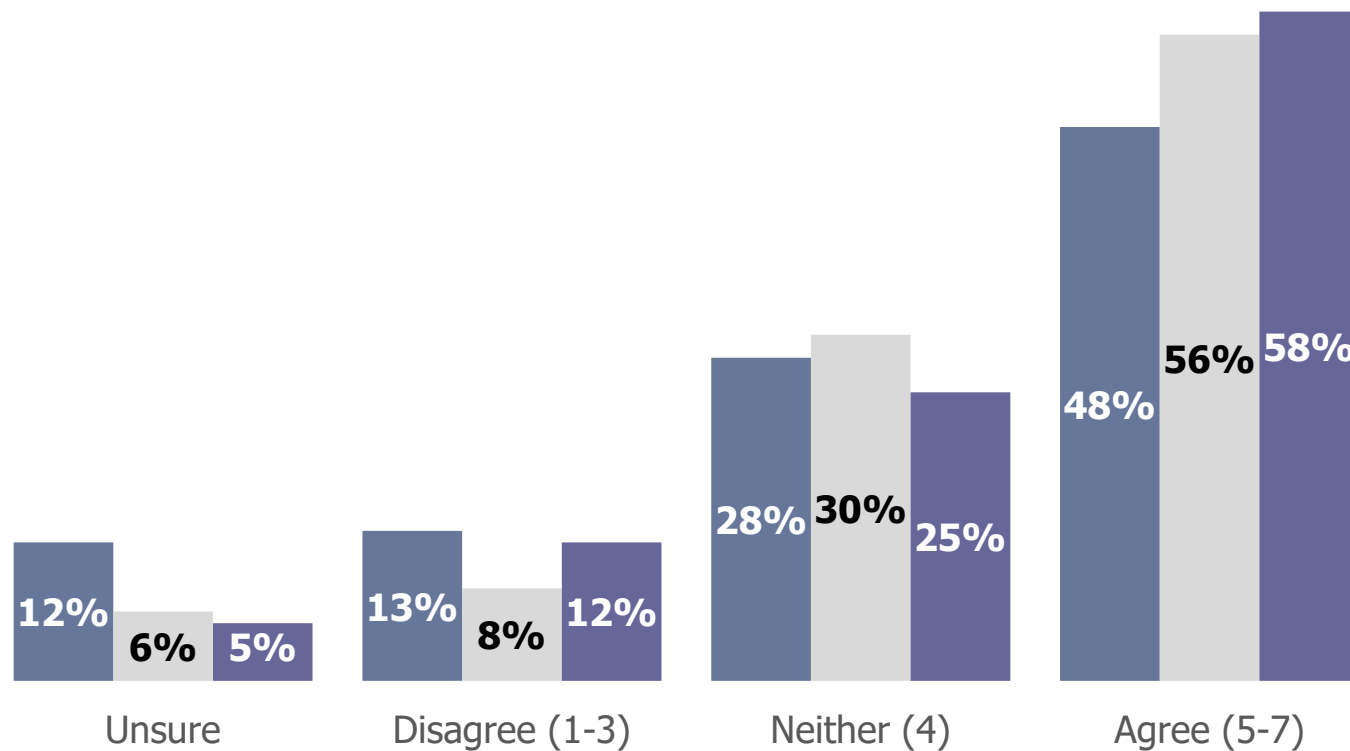
- › Support for RPRA's mandate is stronger now than in 2019.
- › Relative to Tires, Batteries and Electronics are slightly more supportive of the mandate.
- › Amongst the Batteries and Electronics group, support for the mandate shows a progressive increase across regulatory obligations from Electronics to Batteries to both regulations.



Trusted Authority

RPRA is a trusted authority

■ Tires 2021 ■ Batteries 2021 ■ Electronics 2021

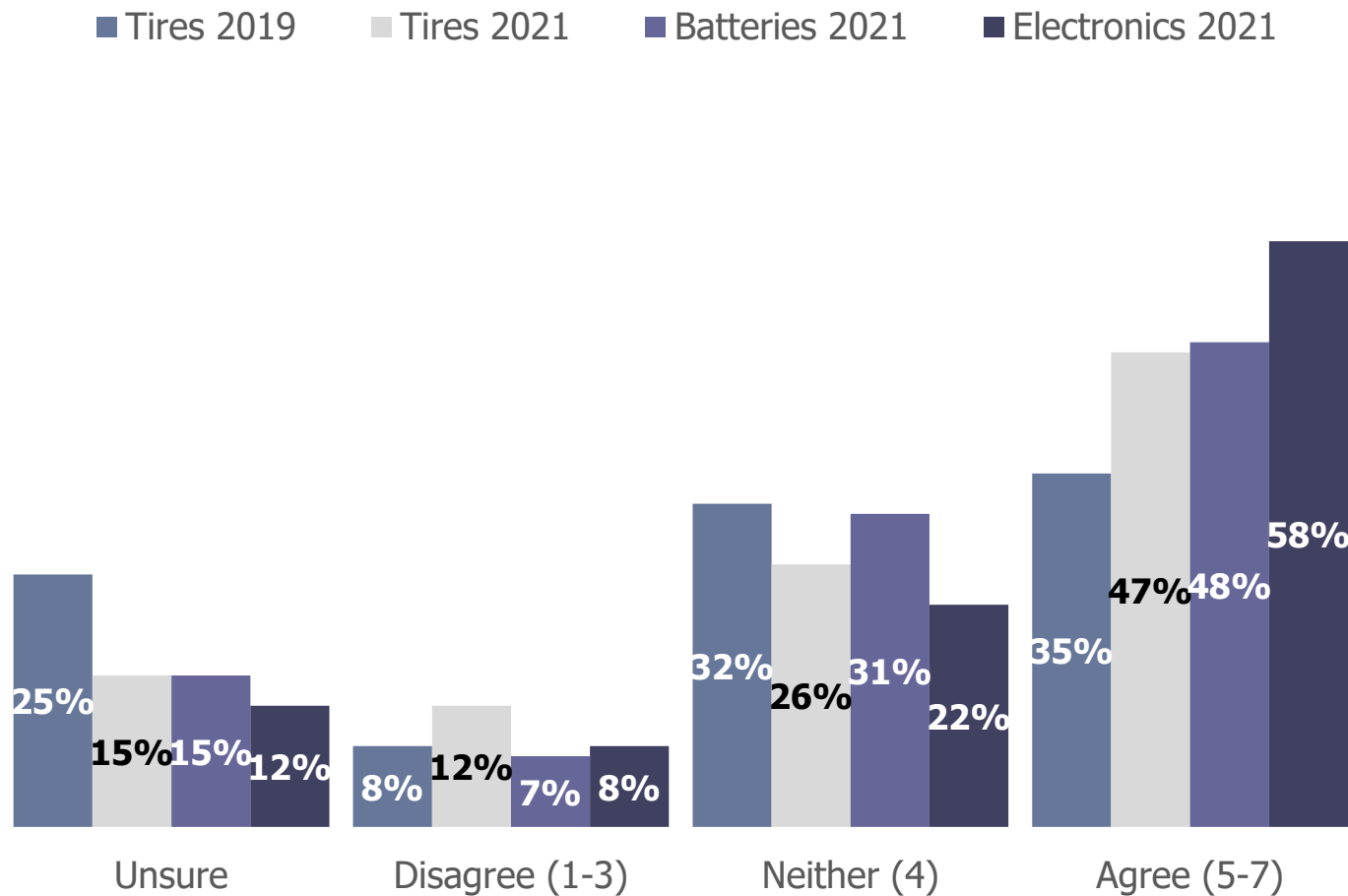


- › Only a small number of stakeholders disagree with the notion that RPRA is a trusted authority.
- › Approximately one half or more agree.
- › The high level of neutrality suggest many stakeholders are taking a wait-and-see approach to trust.



Adhering to its Role

RPRA strictly adheres to its role implementing policy decisions made by the Ontario government and its legislated mandate



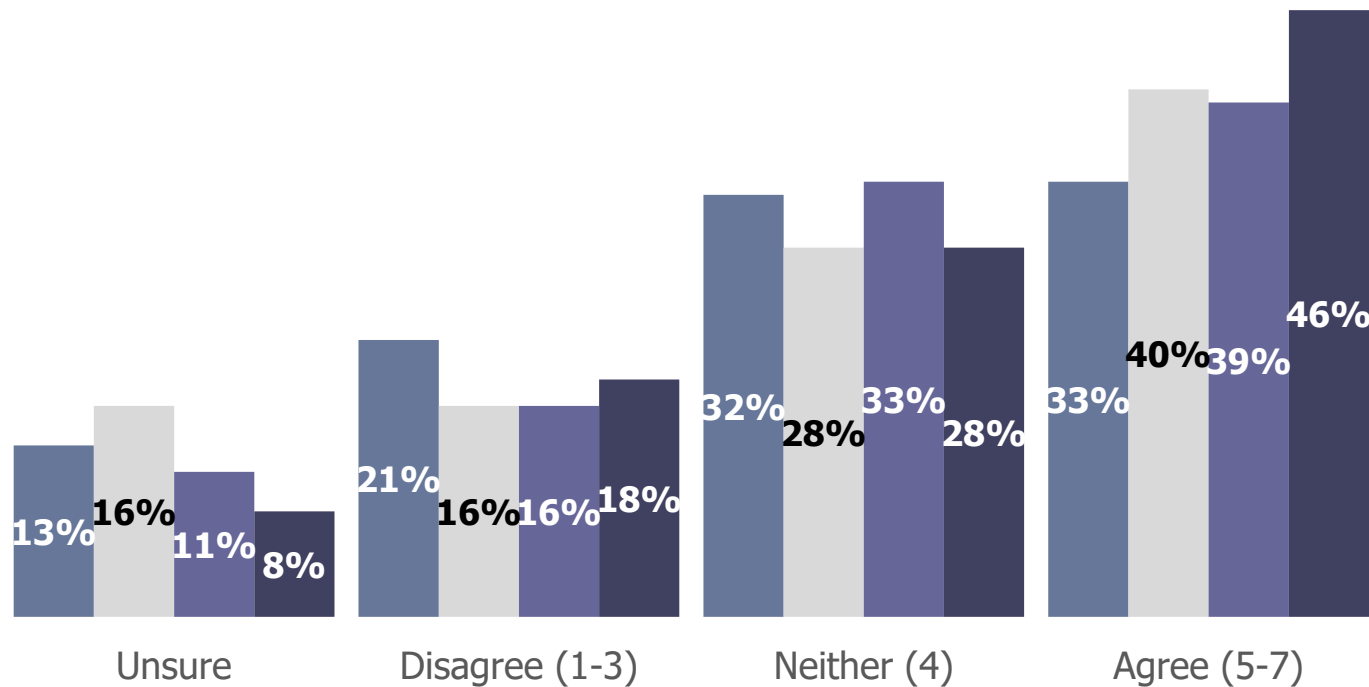
- › As with other findings in the survey, Tires has shifted more positively since 2019. Fewer are unsure and there's been a significant increase in the number of Tires registrants agreeing that RPRA adheres to its role in implementing policy and its mandate.
- › The results for Batteries and Electronics are comparable to the improved results for Tires, if slightly more positive.



Transparency

RPRA is transparent in how it makes decisions

■ Tires 2019 ■ Tires 2021 ■ Batteries 2021 ■ Electronics 2021



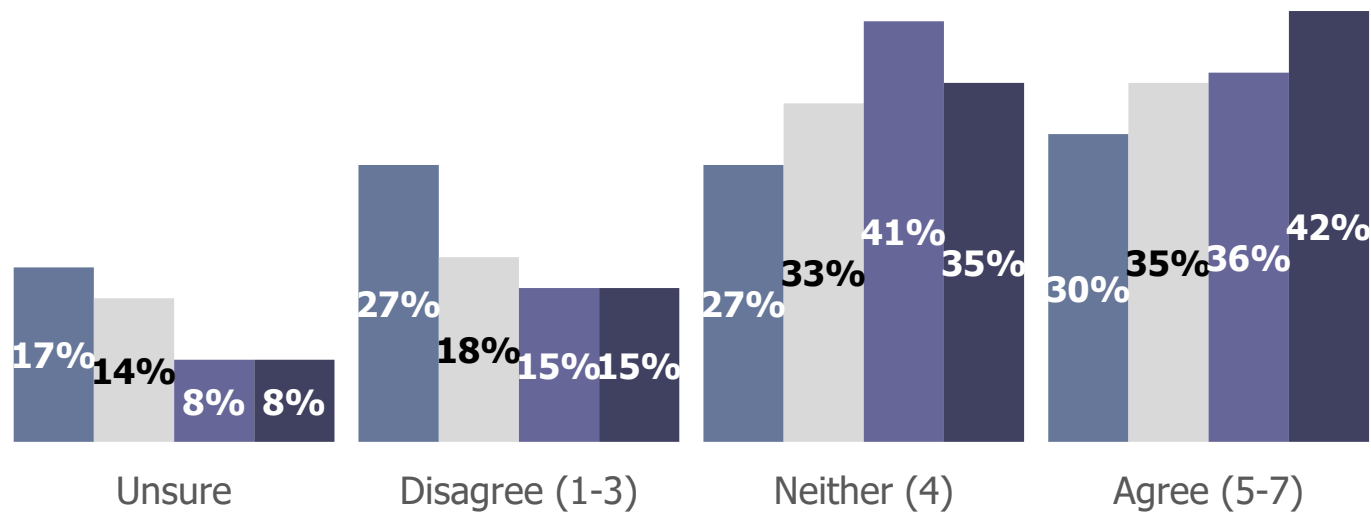
- › There is less agreement among stakeholders that RPRA is transparent in its decision-making.
- › Fewer than a half of registrants from either group agree that RPRA is transparent.
- › That said, Tires has seen a modest improvement on this metric and there are significantly more fence-sitters (unsure/neutral) than those who disagree.
- › Note: the difference between Batteries and Electronics is not statistically significant.



Ensuring a Level Playing Field

RPRA does a good job of ensuring a level playing field

■ Tires 2019 ■ Tires 2021 ■ Batteries 2021 ■ Electronics 2021



› Since 2019, there has been a sizable decrease in the number of Tires registrants who disagree with the idea that RPRA does a good job ensuring a level playing field.

› Note: the difference between Batteries and Electronics is not statistically significant.

Performance

Overall, RPRA's performance metrics are solid and often improved over 2019, with some notable areas requiring attention.

In each of the following areas of performance, RPRA is performing well and improving noticeably:

- › A solid majority now rate RPRA positively on fulfilling its mandate.
- › Strong majorities rate RPRA positively on compliance support metrics.
- › Over 7 in 10 rate RPRA positively on its interactions with stakeholders.
- › Approximately three-quarters are satisfied with their interaction with the Compliance and Registry team.
- › There has been big improvement with Tires rating of their reporting experience.

Performance on a range of CRM attributes show general consistency with past measurement and that Batteries and Electronics are generally more favourable towards RPRA than Tires.

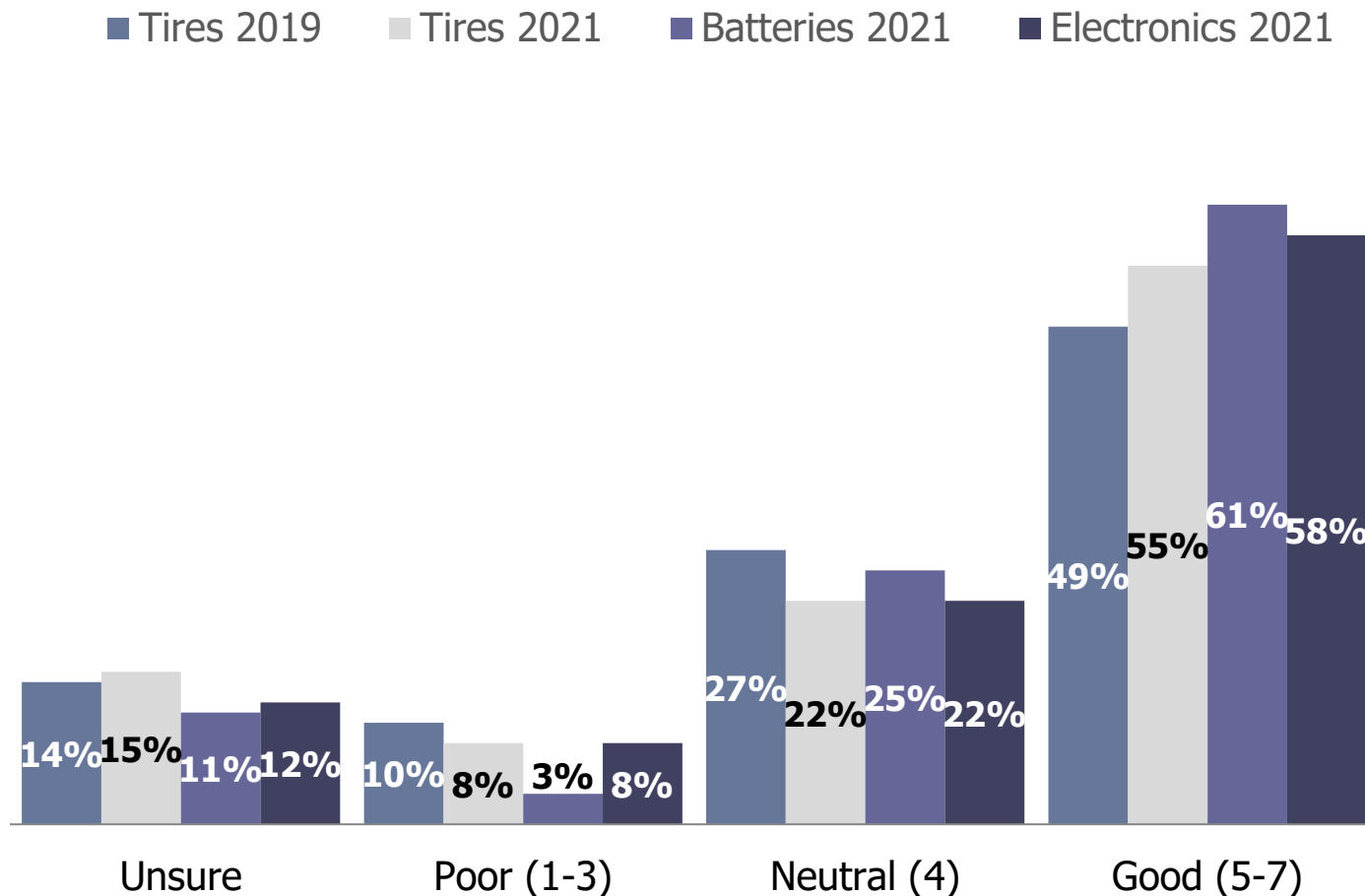
Gap analysis between expectations and performance reveal the following priority areas for stakeholder relations:

- › Understanding stakeholders' business needs – the gap on this remains strong.
- › Fairness – there is a large gap on this for Batteries and Electronics.
- › Providing tech support – this gap has grown for Tires but is reasonable for Batteries and Electronics.
- › Clarity of communications is also a priority for at least Tires.



Rating RPRA on Fulfilling its Mandate

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



- › As with general impressions, the surveys reveal: (a) an improvement in rating RRPA in terms of fulfilling its mandate between the baseline and tracking for Tires, and; (b) Batteries registrants rate RPRA even better than Tires from either survey.
- › Across all surveys, only a small minority of registrations rate RPRA poorly in terms of fulfilling its mandate.
- › In 2019, Tires service providers rated RPRA much higher than producers on this metric. This is no longer the case in 2021.

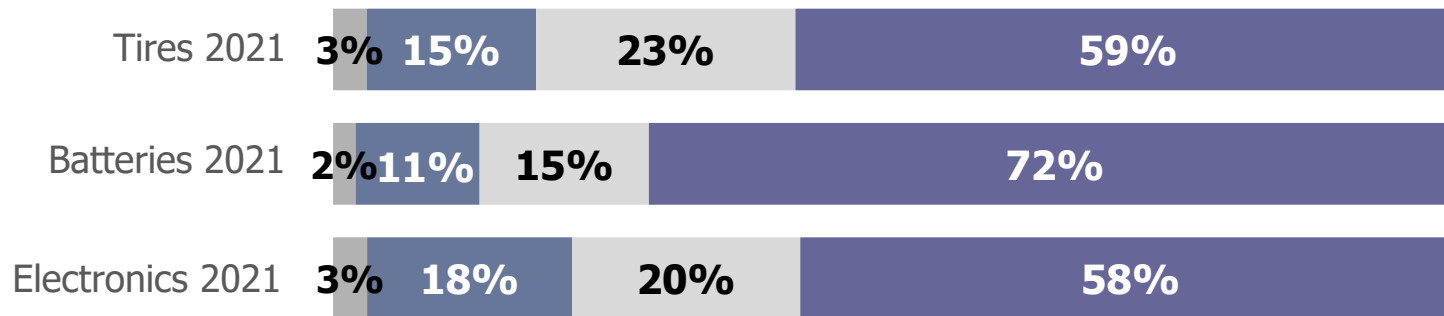


Ratings: Support for Compliance

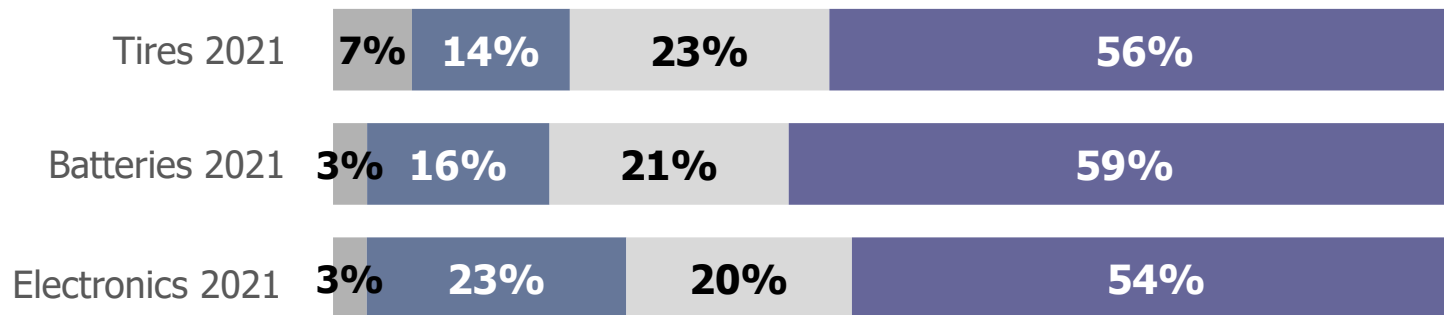
How would you rate RPRAs on each of the following?

■ Unsure ■ Poor (1-3) ■ Neutral (4) ■ Good (5-7)

Helping you understand what is needed to be compliant with regulatory requirements



Supporting you to be compliant with regulatory requirements



- Overall, stakeholders are fairly positive about RPRAs both in terms of helping them understand how to be compliant and with the support provided.
- Batteries are significantly more positive on rating help with understanding than other stakeholders.

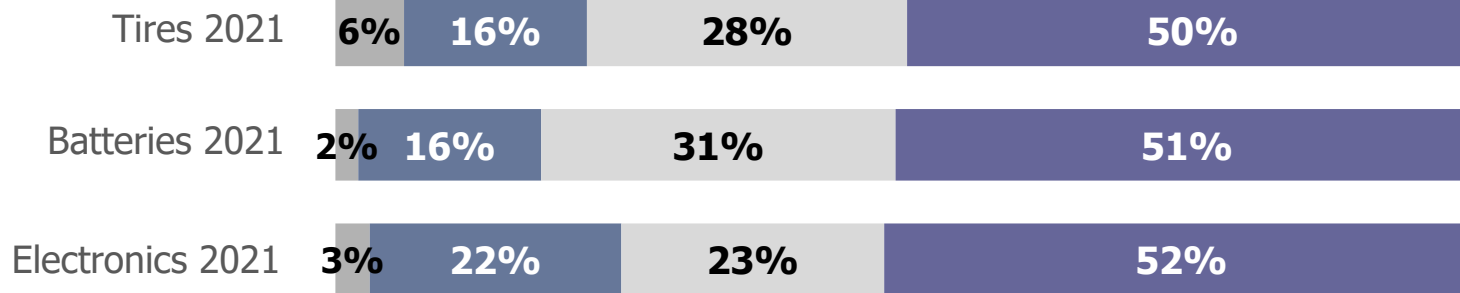


Ratings: Help with Adapting and Accountability

How would you rate RPRA on each of the following?

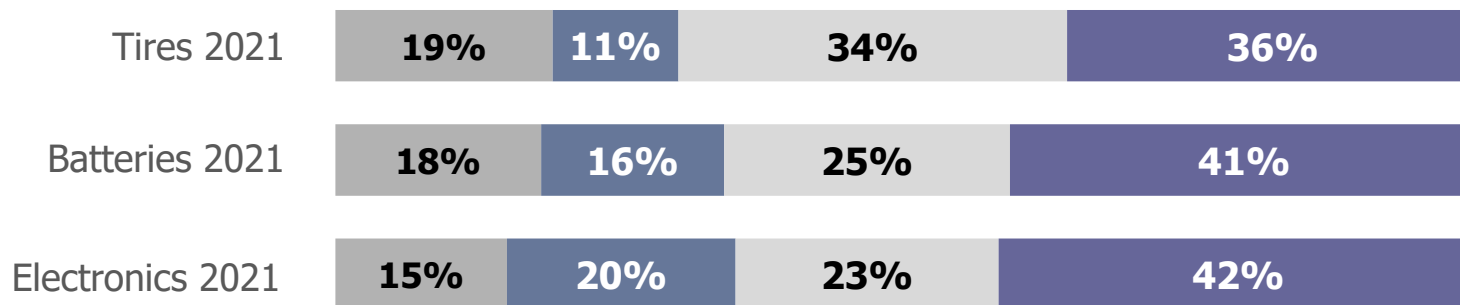
■ Unsure ■ Poor (1-3) ■ Neutral (4) ■ Good (5-7)

Helping you adapt to the new regulations



- › Roughly half of stakeholders rate RPRA positively on helping them adapt to new regulations.
- › Stakeholders are much less certain about accountability. Approximately half are either unsure or neutral on this front.

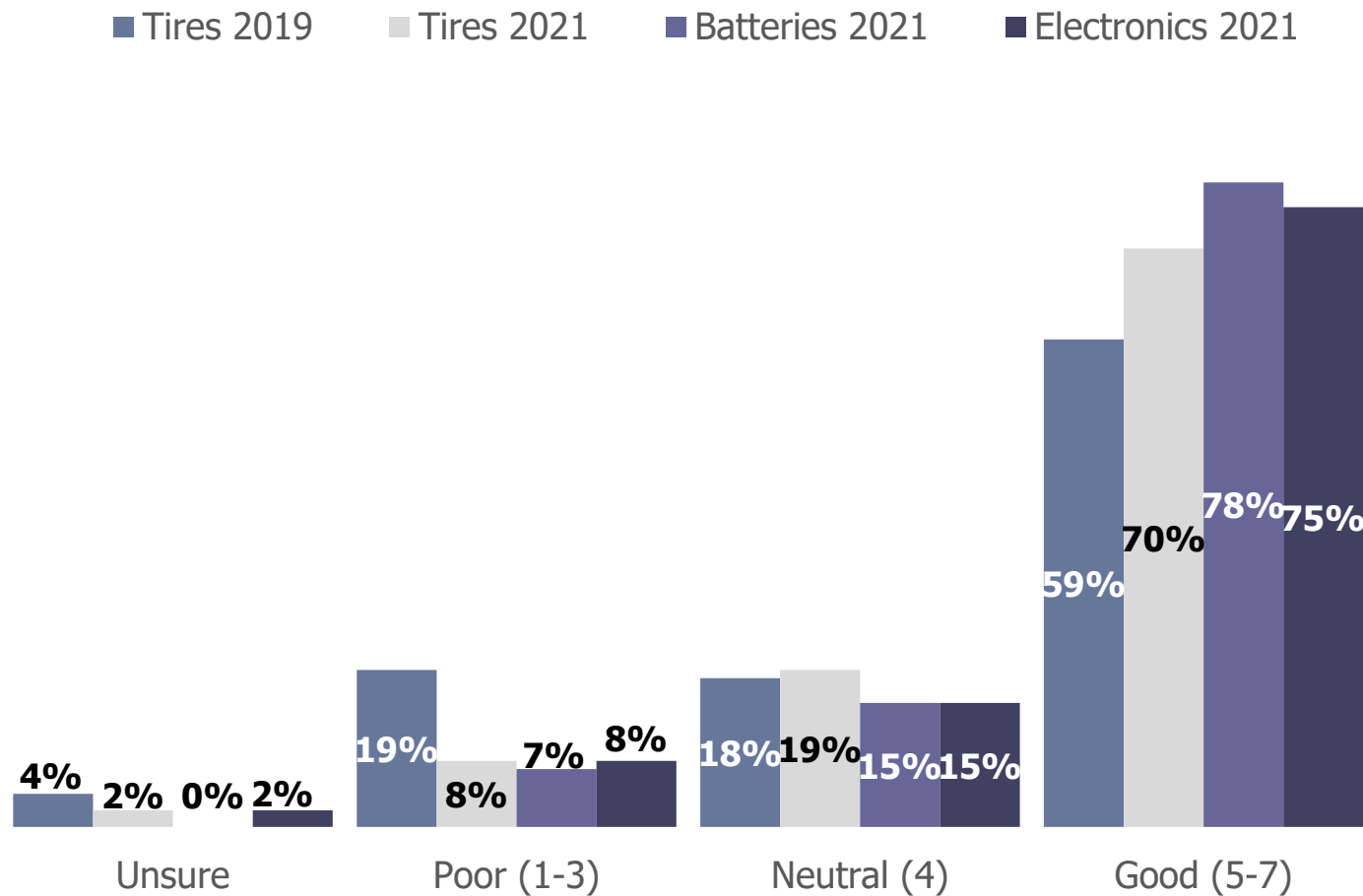
Being accountable to its stakeholders





Rating Interactions with RPRA

Thinking about the interactions you have had with RPRA to date, how would you rate these interactions overall?

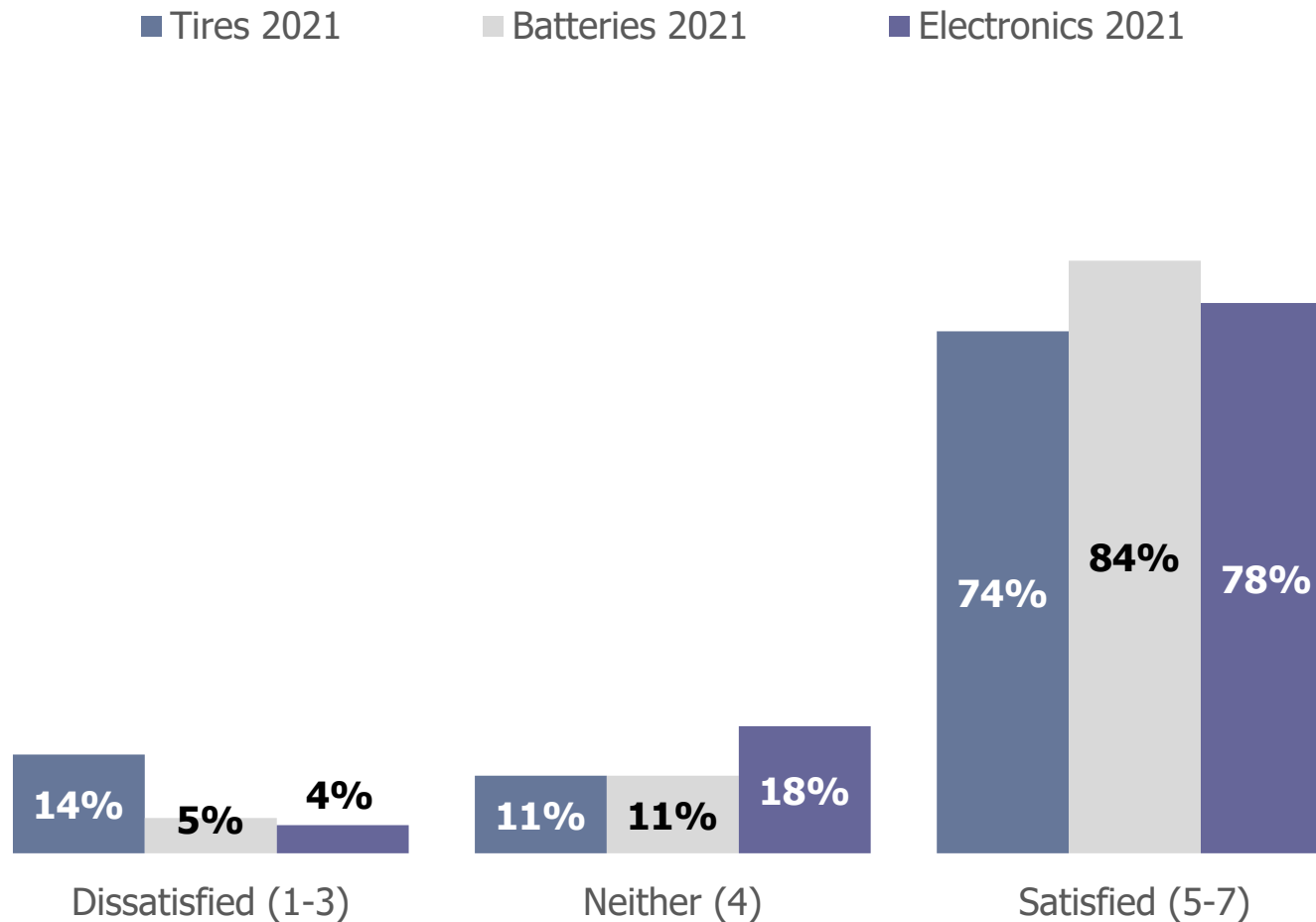


- › A strong majority of all registrant groups currently rate their interactions with RPRA positively.
- › There has been a notable improvement in the results for Tires since 2019.
- › Batteries and Electronic producers rate their interactions with RPRA higher than service providers.



Satisfaction for Interaction with Compliance and Registry

How satisfied are you with the interaction you had with the Compliance and Registry team?



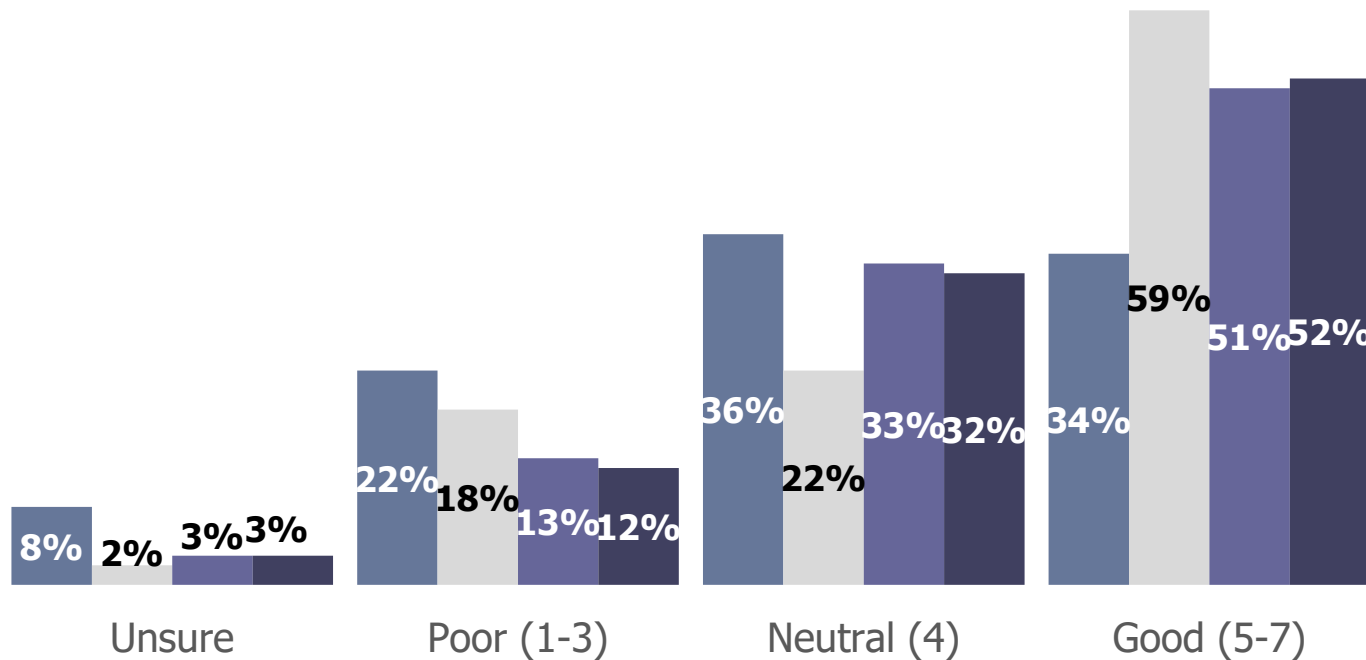
- › This year, both surveys asked the level of satisfaction for interactions with the Compliance and Registry team.
- › Overall, satisfaction is high for both Tires and Batteries & Electronics at approximately three-quarters for each.
- › Batteries and Electronics producers show higher satisfaction than service providers.



Rating of Reporting Experience

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

■ Tires 2019 ■ Tires 2021 ■ Batteries 2021 ■ Electronics 2021



- › Tires registrants rate their reporting experience much more favourably than they did in 2019.
- › Batteries and electronics ratings are also similar to Tires in 2021 and much more positive than the initial baseline measurement for Tires.



Gaps between Performance and Expectations

The gap analyses on the following slide are based on the differences between expectations and performance (subtracting expectations scores from performance ratings).

These gaps identify key priority areas for RPRA in its stakeholder relations. This year's surveys reveal the following key priority areas:

- Understanding stakeholders' business needs – the gap on this remains large and is so for each stakeholder group.
- Fairness – there is a large gap on this for Batteries and Electronics.
- Providing tech support – this gap has grown for Tires but is reasonable for Batteries and Electronics.
- Clarity of communications is also a priority for at least Tires.

The tracking analysis also shows notable improvement for Tires in terms of website ease of use and is effectively unchanged in other areas not noted above.



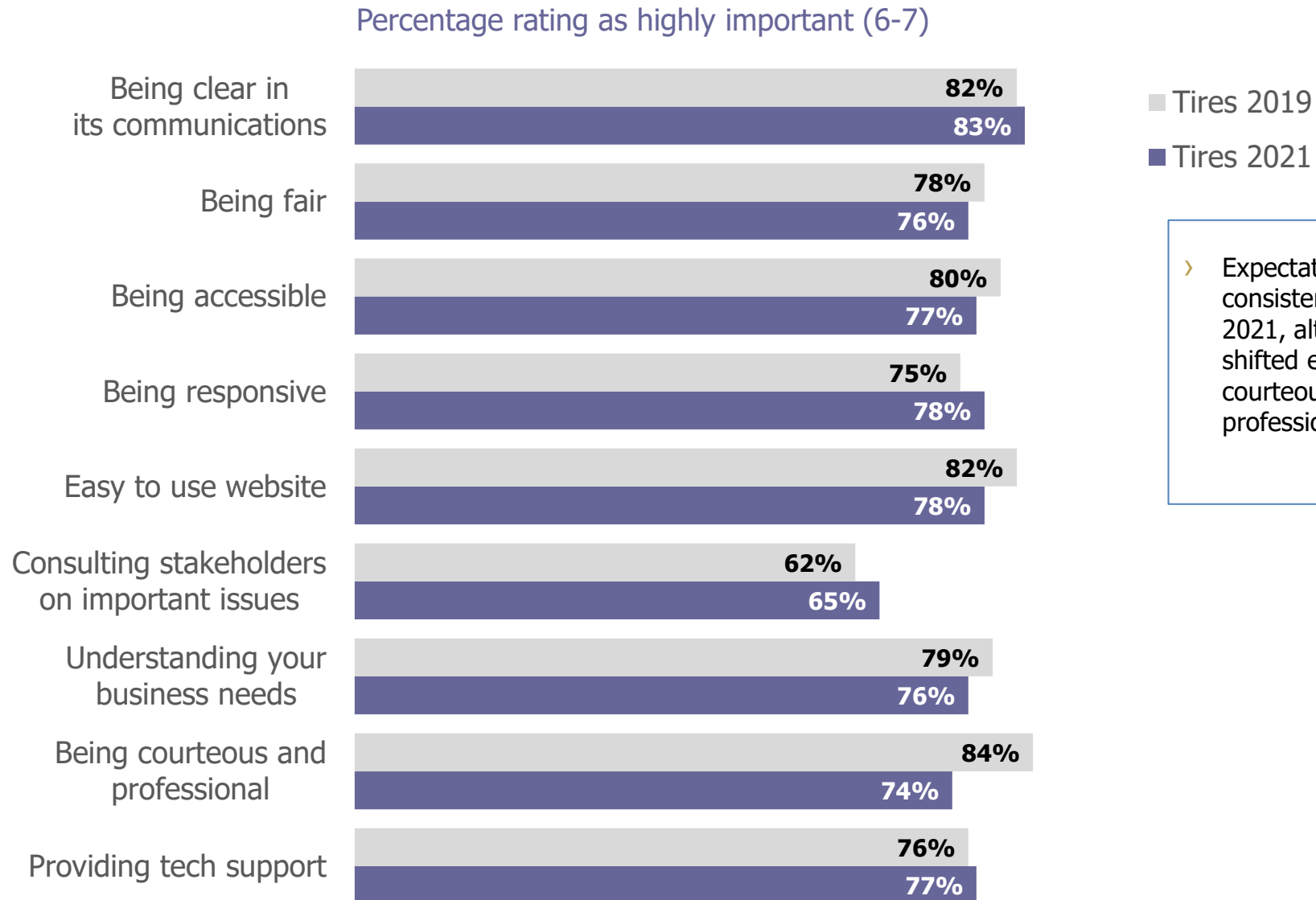
Gap Analyses

	Tires 2019	Tires 2021	Batteries 2021	Electronics 2021
Providing tech support	-18	-26	-19	-14
Being courteous and professional	-2	+1%	+10	+18
Understanding your business needs	-29	-26	-28	-27
Consulting stakeholders on important issues	-18	-16	-16	-23
Easy to use website	-25	-10	-7	0
Being responsive	-7	-7	-12	-11
Being accessible	-17	-15	-13	-12
Being fair	-21	-16	-34	-34
Being clear in its communications	-30	-25	-15	-14



Expectations when Dealing with RPRA – Tires

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



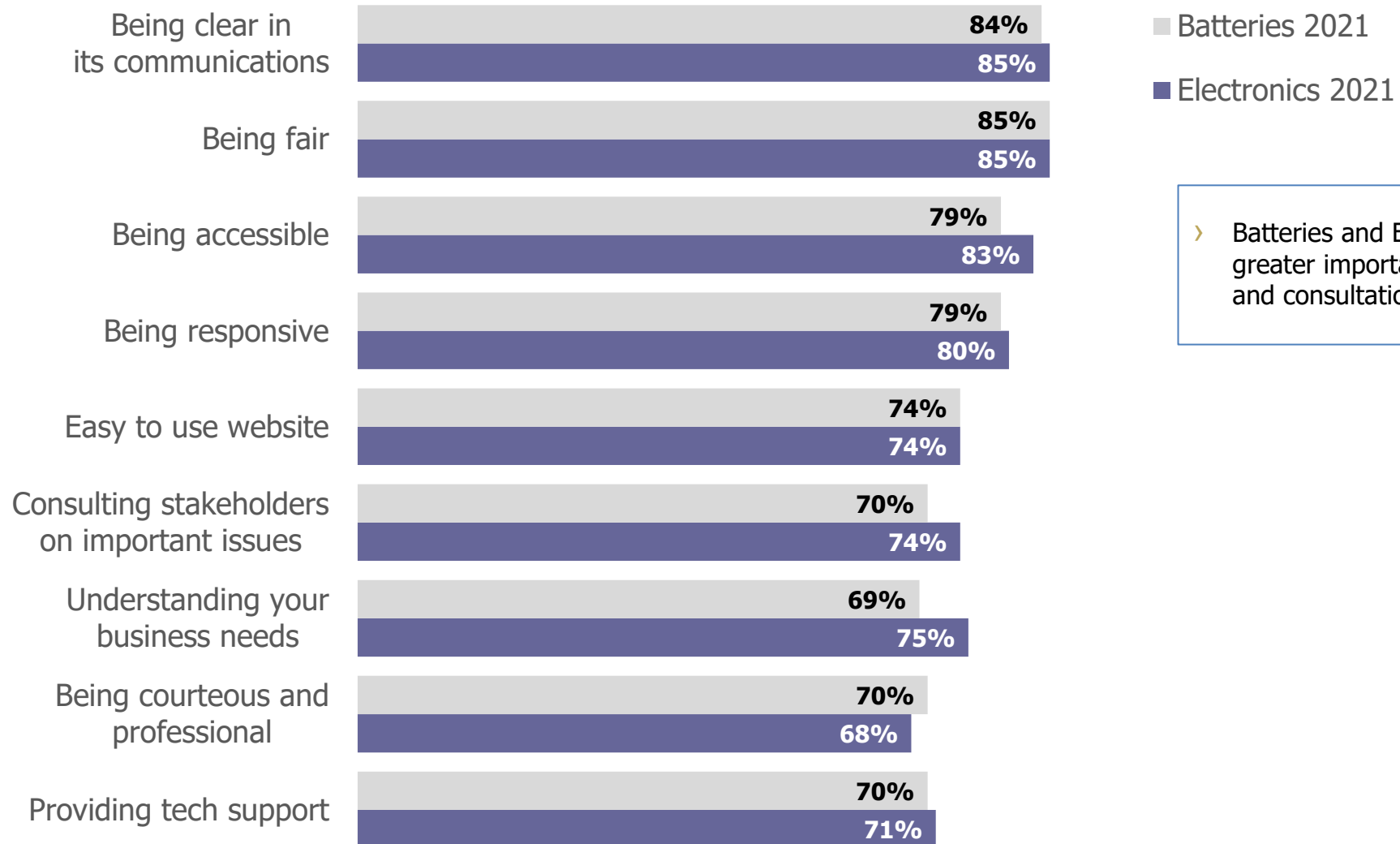
> Expectations are largely consistent between 2019 and 2021, although Tires has shifted expectations for courteousness and professionalism downward.



Expectations when Dealing with RPRA – Battery & Electronics

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

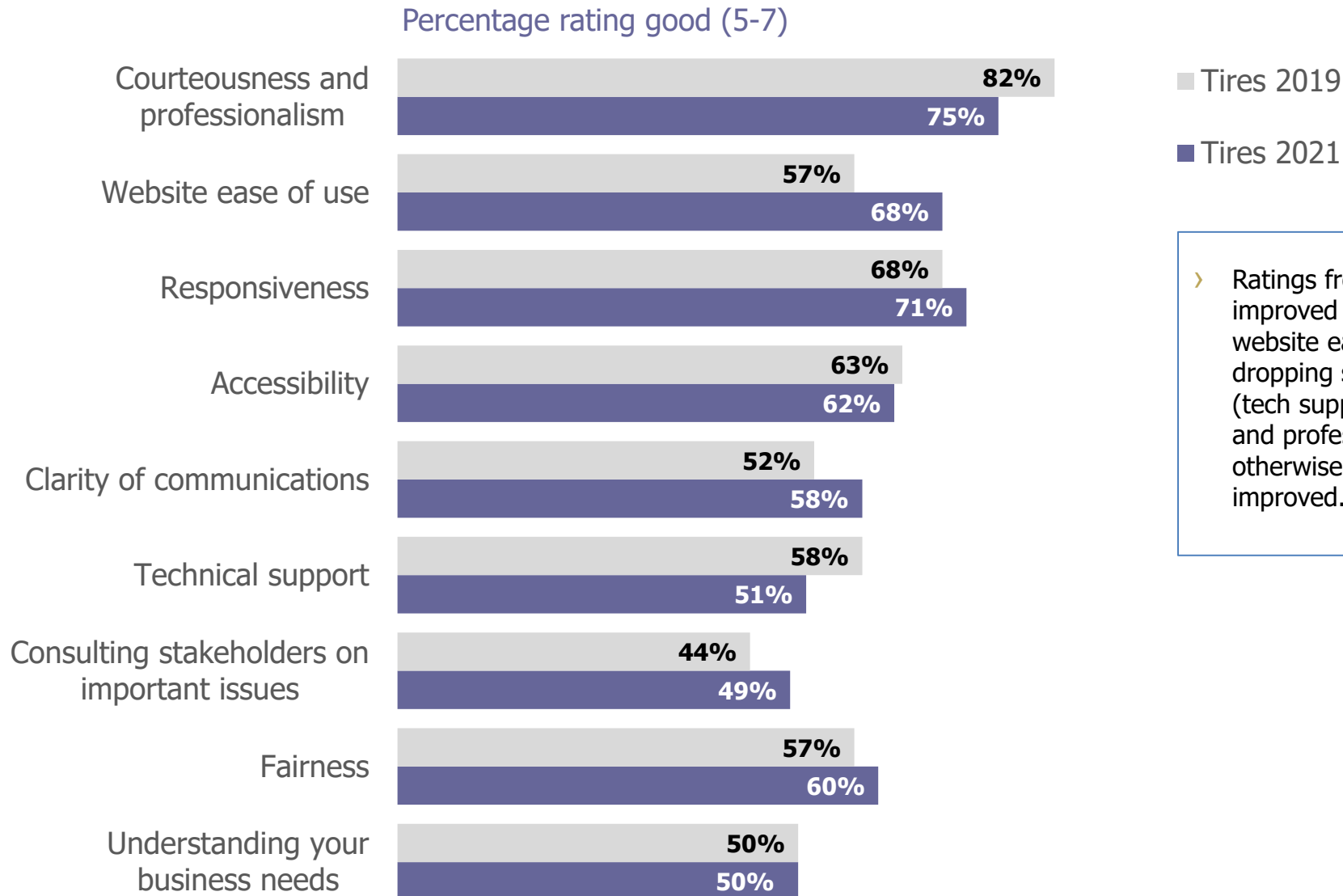
Percentage rating as highly important (6-7)





RPRA's Performance Ratings – Tires

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

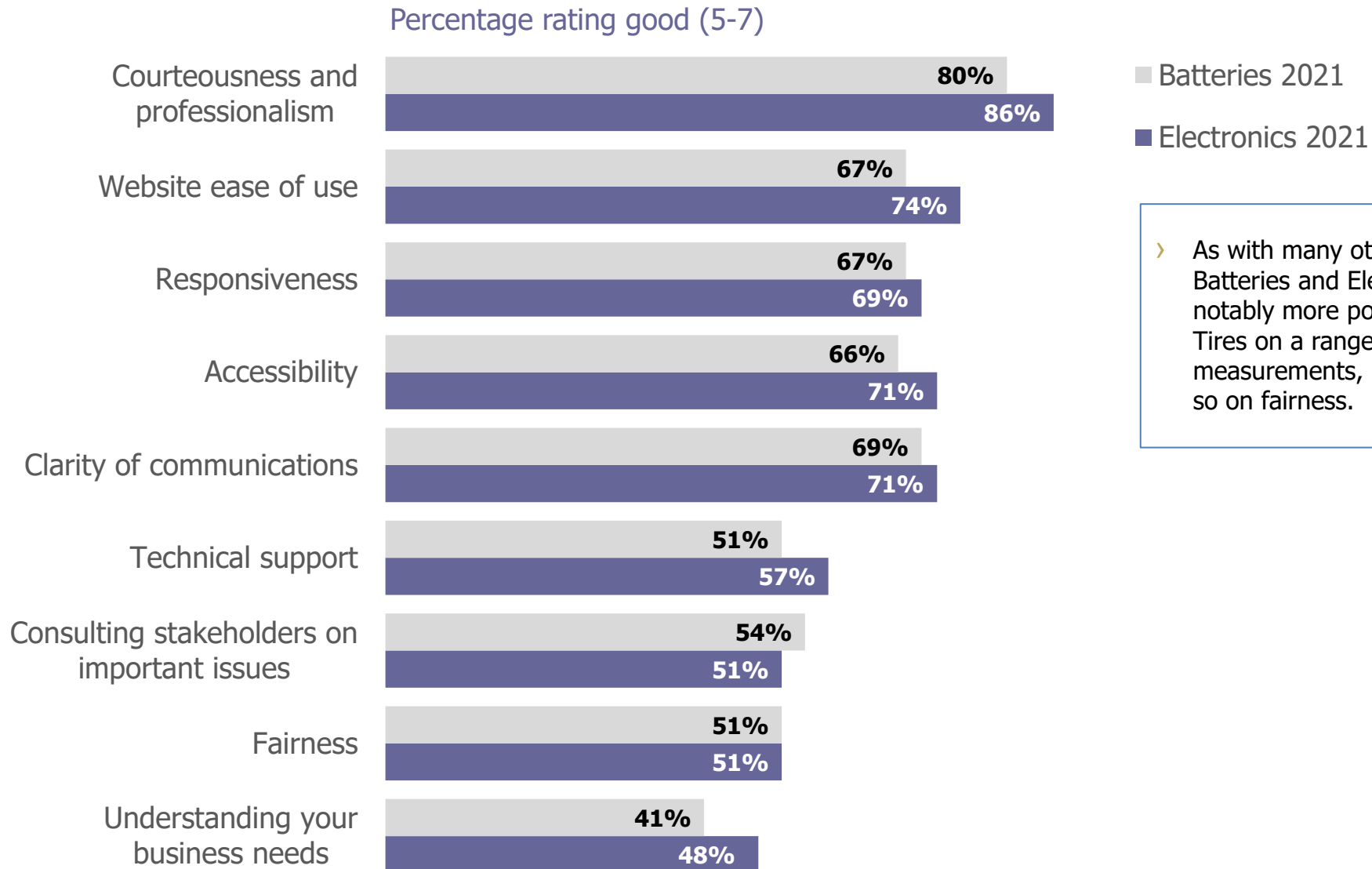


> Ratings from Tires have improved appreciably on website ease of use, while dropping slightly in other areas (tech support, courteousness and professionalism) and are otherwise even or directionally improved.



RPRA's Performance Ratings – Batteries & Electronics

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



> As with many other findings, Batteries and Electronics are notably more positive than Tires on a range of these measurements, although less so on fairness.



Performance KPI

A performance KPI has been developed as a metric to measure year-over-year performance by RPRA.

Three variables are used for this KPI:

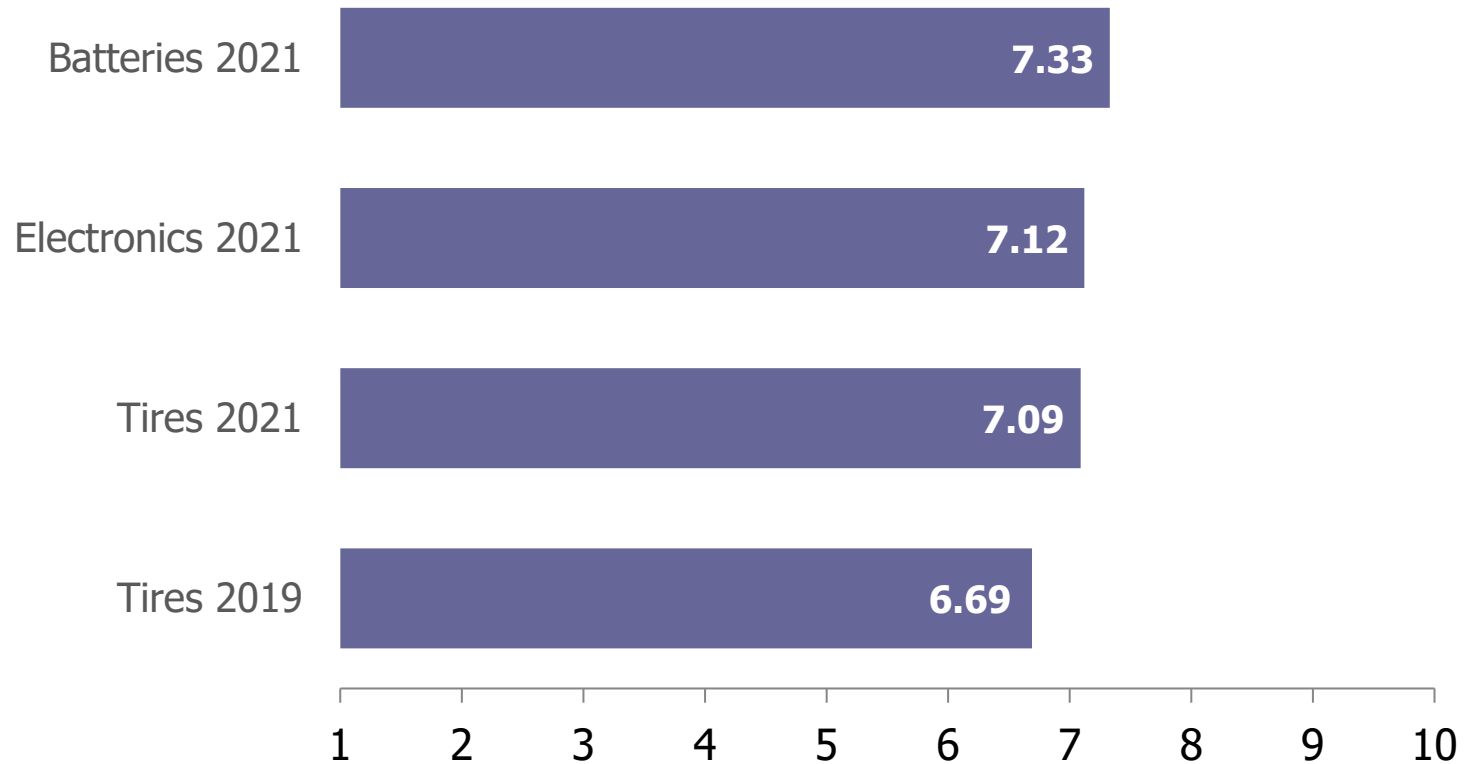
- **Reputation:** “Overall, based on everything you may have seen or heard, what is your general impression of RPRA?”
- **Mandate fulfillment:** “Based on everything you may have heard or seen to date, how would you rate RPRA in terms of fulfilling its mandate?”
- **Support for compliance:** “How do you rate RPRA on ... Supporting you to be compliant with regulatory requirements?”

The KPI is calculated by taking an average of the mean scores for each of these variables and then calibrating it to be a score out of 10 (rather than the 7-point scale used for the means).



Performance KPI

- › Performance KPI is an index of 3 survey variables:
 - Reputation
 - Mandate fulfillment
 - Support for compliance*



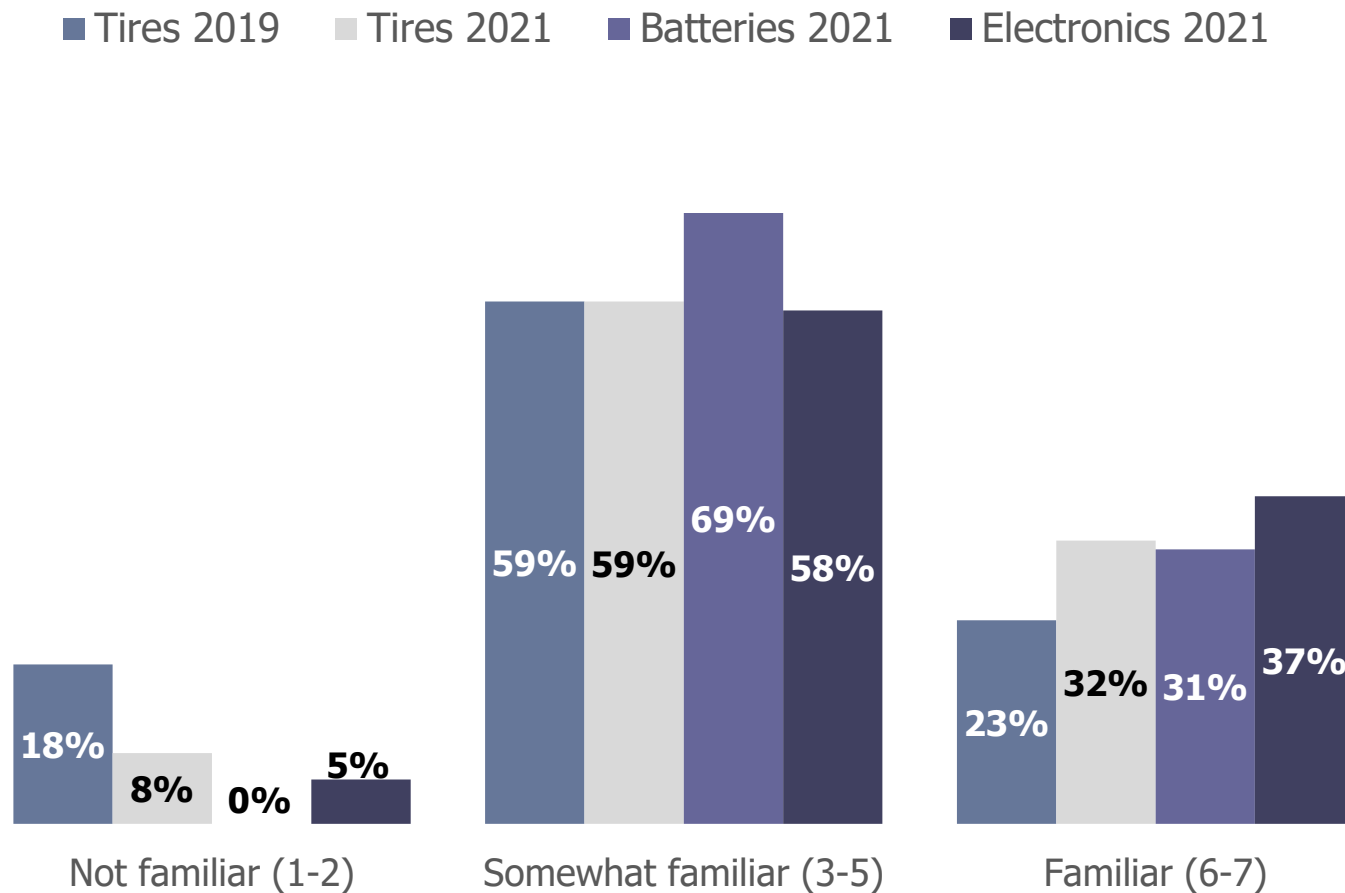
Stakeholder Awareness, Understanding and Messaging

- › Stakeholder familiarity with RPRA, IPR and circular economy have improved modestly since 2019.
- › Batteries and Electronics report significantly higher familiarity than Tires with IPR and circular economy.
- › As in 2019, the concepts for IPR and circular economy resonate well with stakeholders.
- › Notably, Batteries and Electronics are less enthusiastic than Tires about the idea that IPR spurs innovation.
- › The idea that the new producer framework reduces red tape is met with significant resistance.



Familiarity with RPRA

How familiar are you with RPRA?



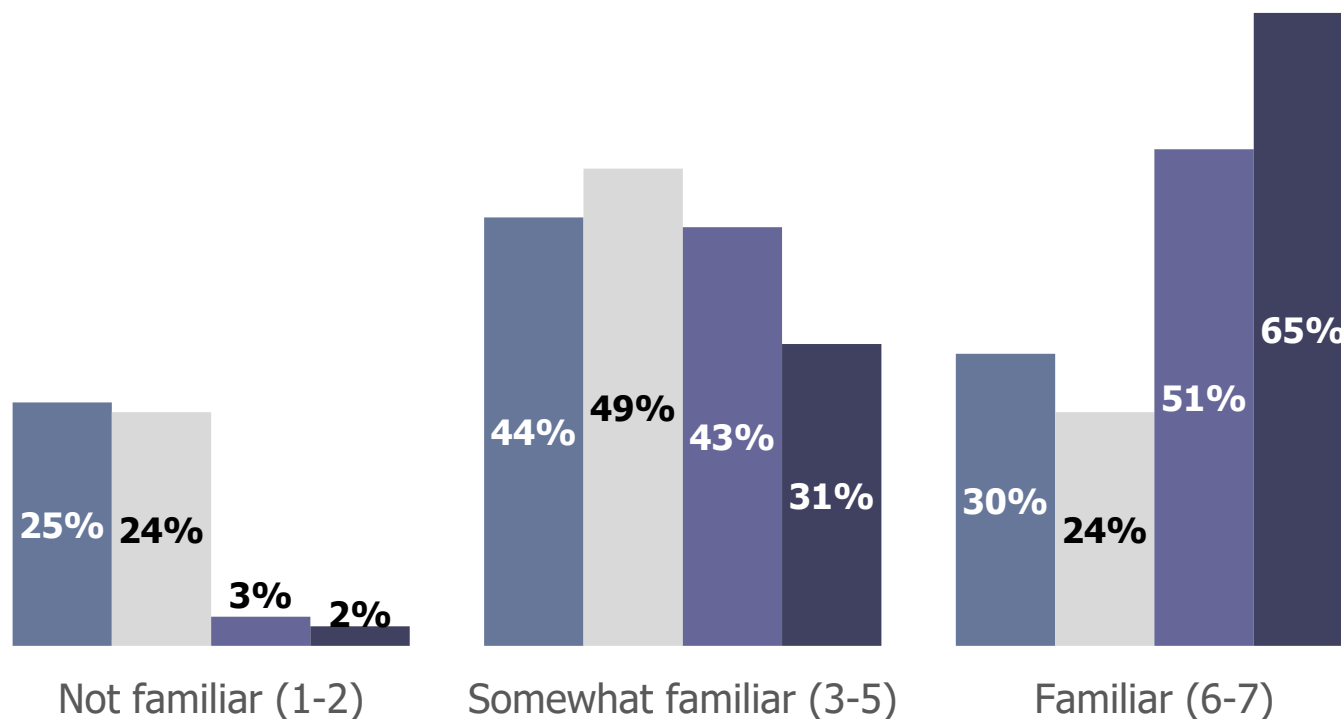
- › Tires' familiarity with RPRA has improved notably since the baseline measurement in 2019 (up almost 10 points).
- › Batteries and Electronics have higher familiarity than did Tires for its baseline (albeit they are both similar with this year's measurement).
- › There is a statistically significant progressive increase in familiarity across regulatory obligations from Electronics to Batteries to both regulations among the B&EEE registrants.



Familiarity with IPR

How familiar are you with the following?
Individual Producer Responsibility (IPR), also known as Extended Producer Responsibility

■ Tires 2019 ■ Tires 2021 ■ Batteries 2021 ■ Electronics 2021



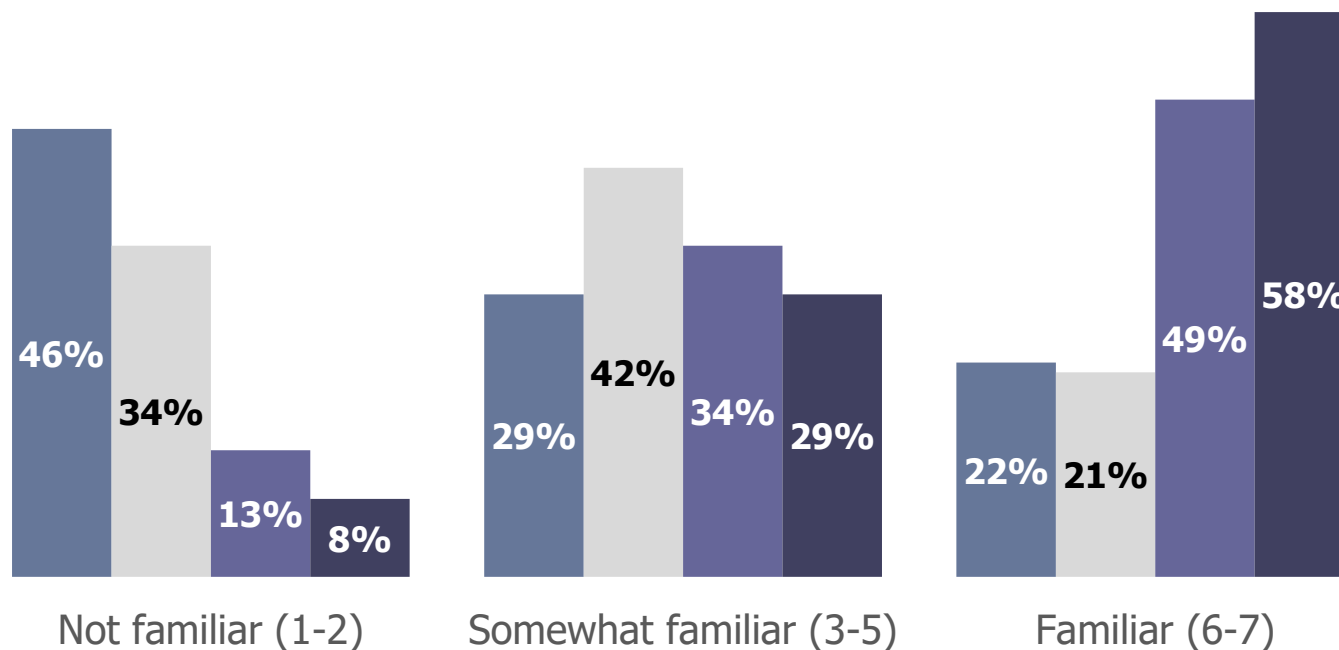
- › Batteries and electronics are significantly more familiar with IPR than Tires.
- › Tires service providers are more familiar with IPR than producers, as in 2019. The same does not hold for Batteries and Electronics.
- › Electronics registrants show higher familiarity than Batteries (51 vs. 65 per cent).



Familiarity with Circular Economy

How familiar are you with the following?
Circular Economy

■ Tires 2019 ■ Tires 2021 ■ Batteries 2021 ■ Electronics 2021



- › As with IPR, Batteries and electronics are significantly more familiar with circular economy than is Tires.
- › Tires has been steady in terms of familiarity since 2019, although those unfamiliar has dropped.
- › As in 2019, Tires service providers are more familiar with circular economy than producers. The same does not hold for Batteries and Electronics.
- › Electronics registrants show higher familiarity than Batteries.

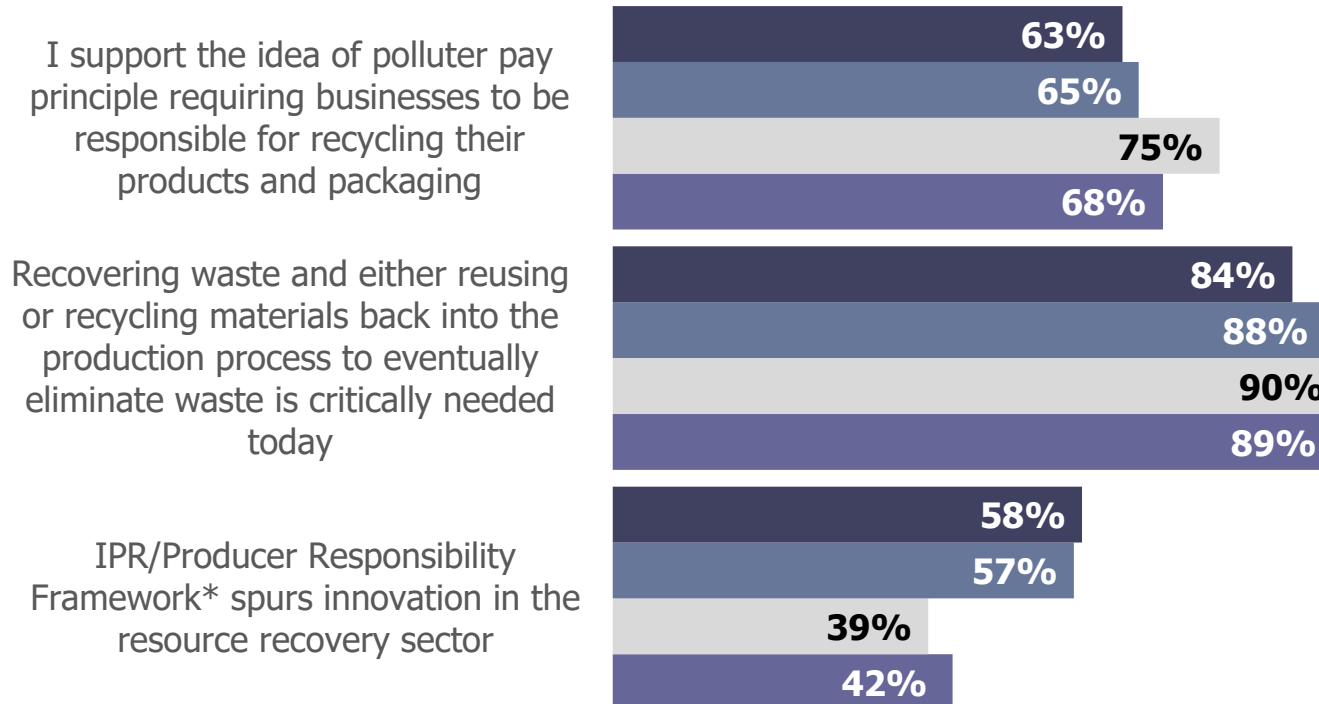


IPR and Circular Economy

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

- Tires 2019
- Tires 2021
- Batteries 2021
- Electronics 2021

Percentage in agreement (5-7)



- › There continues to be broad agreement with the two core concepts measured, and particularly circular economy.
- › The results for Tires on each of these metrics is more or less unchanged since 2019.
- › While Batteries and Electronics are similar, if a slightly more agreeable with IPR and circular economy, they are significantly less captured by the idea of IPR spurring innovation.
- › In 2019, Tires service providers showed higher resonance with these concepts than producers. This was not the case in 2021.

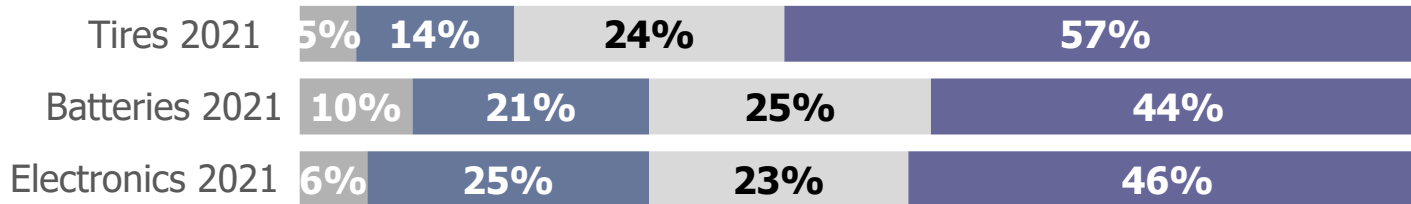


Producer Responsibility Framework

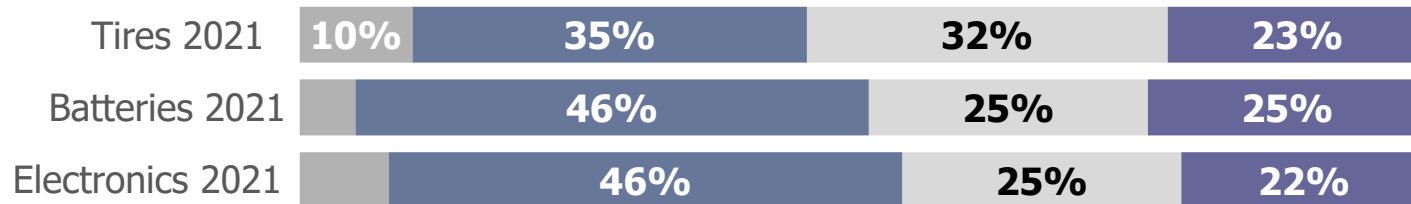
How strongly do you agree or disagree with the following statements about the new producer responsibility framework in Ontario?

■ Unsure ■ Disagree (1-3) ■ Neutral (4) ■ Agree (5-7)

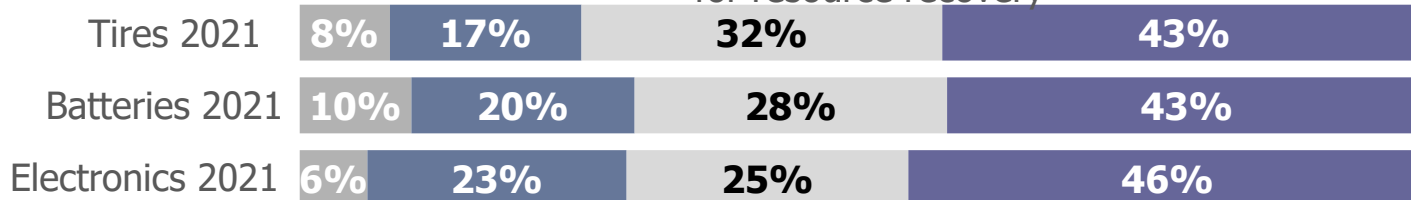
It improves waste management



It reduces red tape for businesses



It fosters a more competitive marketplace for resource recovery



- The 2021 surveys tested a number of concepts around the new producer responsibility framework.
- The idea that the new framework reduces red tape met with significant resistance and resonates poorly.
- Each concept (particularly improving waste management) resonated more strongly for Tires than Batteries and Electronics.
- Each of these statements garnered stronger agreement from Tires service providers than producers

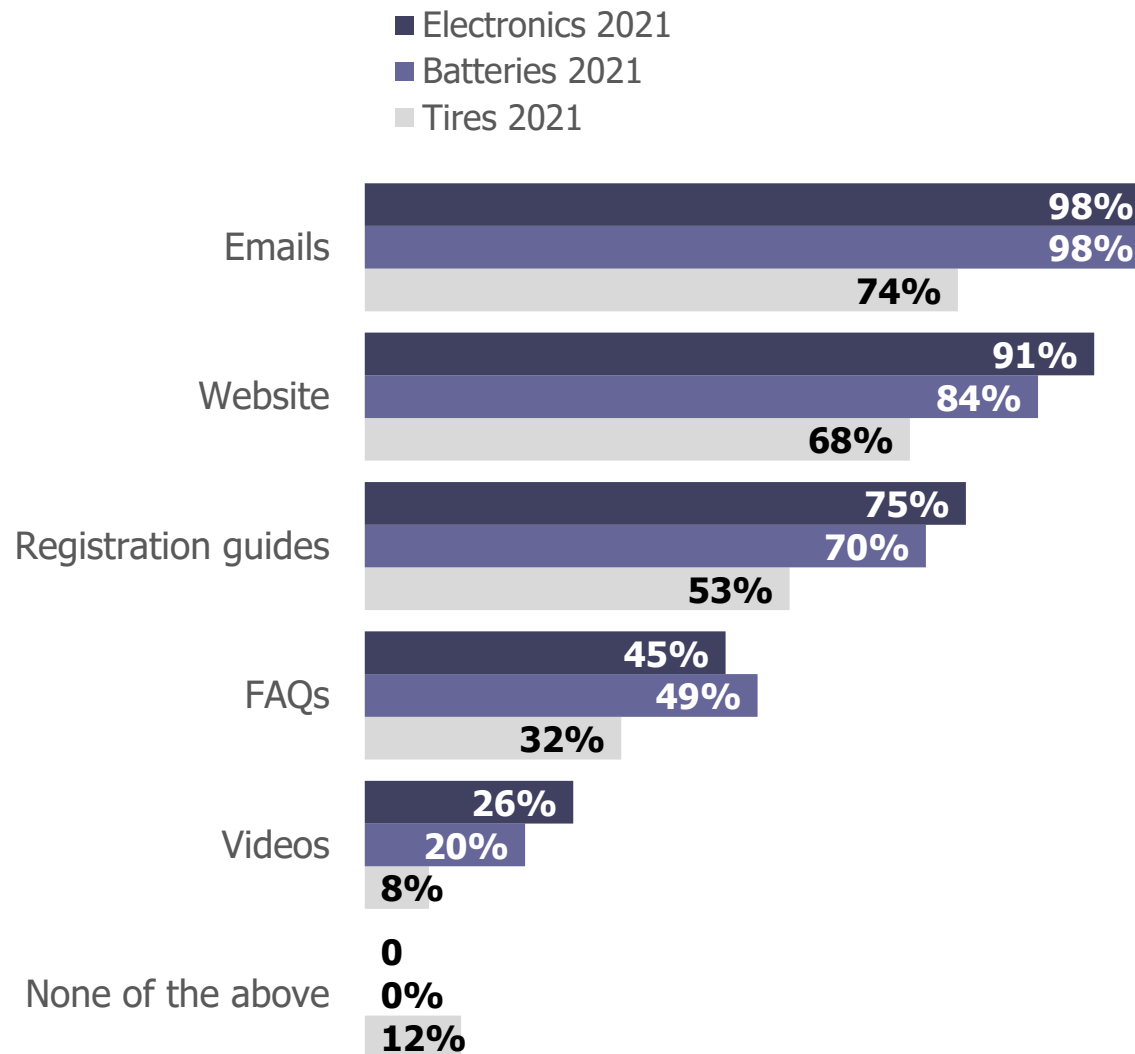
Stakeholder Interaction with RPRA, Communications and Consultations

- › Batteries and Electronics have a more robust level of interaction than Tires with RPRA.
- › A majority of stakeholders have contacted the Compliance and Registry team (almost two-thirds of Tires and three-quarters of Batteries and Electronics).
- › There is fairly widespread usage of RPRA's communications products, particularly among Batteries and Electronics registrants.
- › Ratings for each of the communications products are strong.
- › On consultations there continues to be a high level of agreement.
- › Batteries and Electronics registrants are generally more positive about consultations than Tires.



Usage of Communication Products

Have you ever used or referenced any of the following RPRA communication products?

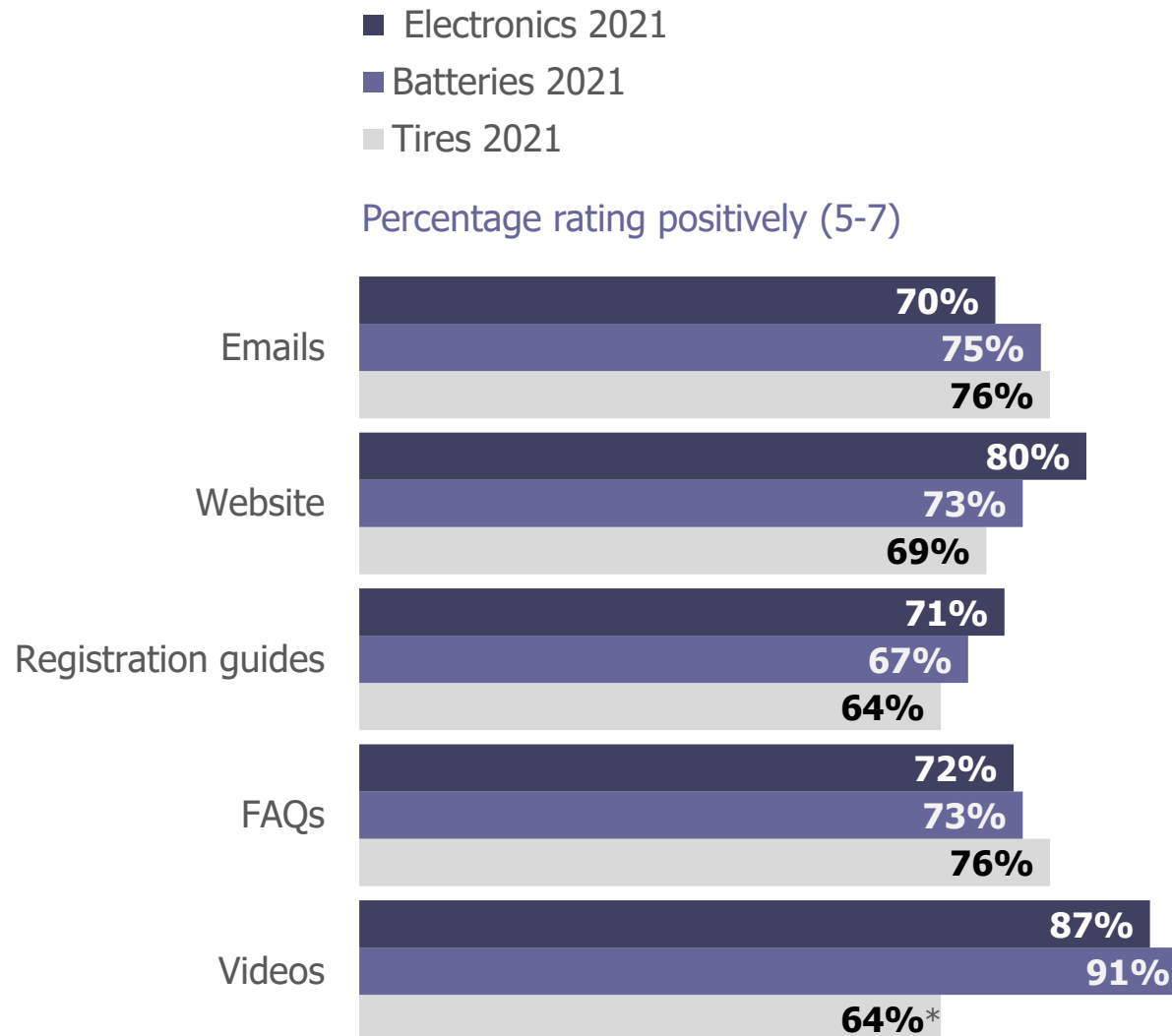


> As found with other interaction and contact, Batteries and Electronics are significantly more likely than Tires to have used each of the communications products tested in this year's surveys.



Rating of Communications Products

How would you rate each of these in terms of their usefulness?



- > Large numbers of each registrant group rate every communications product favourably.
- > Batteries and Electronics are particularly pleased with videos.

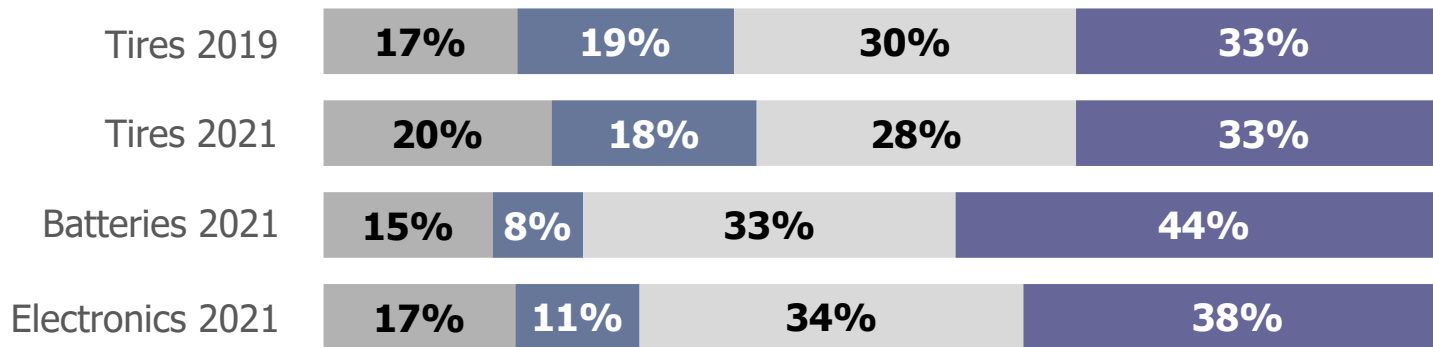


Stakeholder Consultations

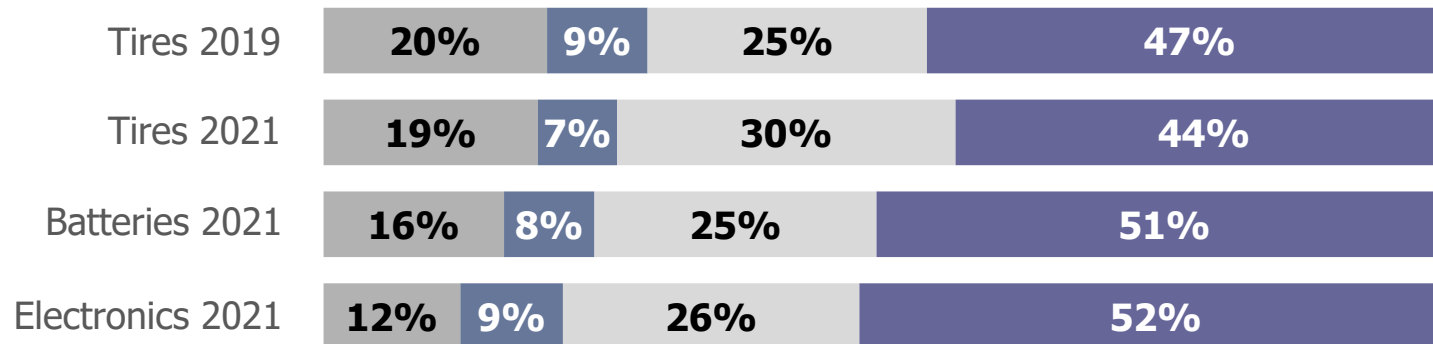
Thinking about any consultations that RPRA may conduct with its stakeholders, how strongly do you agree or disagree with each of the following statements?

■ Unsure ■ Disagree (1-3) ■ Neutral (4) ■ Agree (5-7)

RPRA listens to the concerns of people like me



RPRA consultations are open and inclusive



- There continues to be a significant level of non-response from registrants when asked about RPRA's consultations (suggesting these registrants are unaware of the consultations).
- The idea that consultations are open and inclusive, as well as being helpful and engaging, resonate most strongly.
- Batteries and Electronics are slightly more positive in their response to the questions around consultations than are Tires registrants.

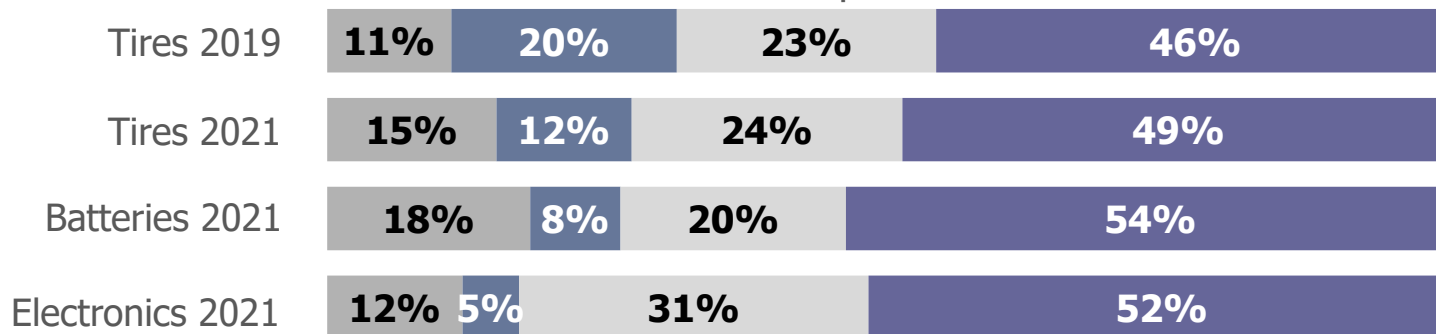


Stakeholder Consultations II

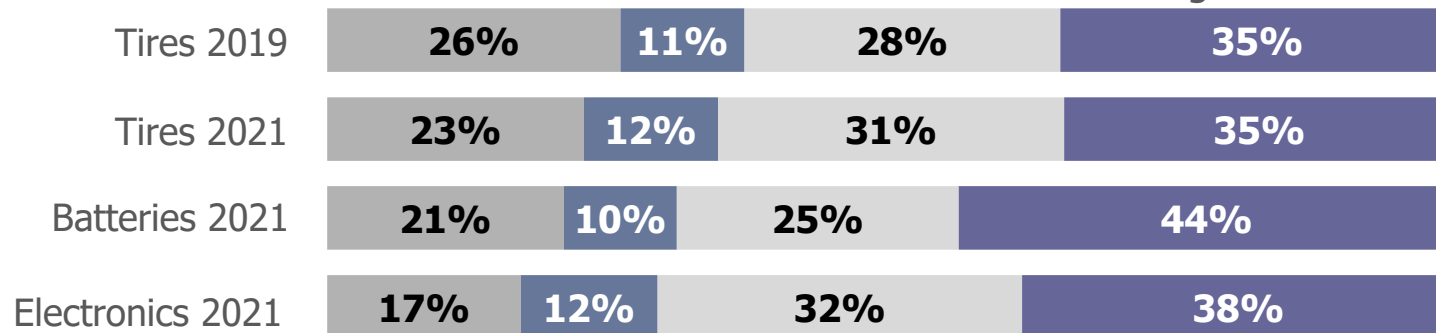
Thinking about any consultations that RPRA may conduct with its stakeholders, how strongly do you agree or disagree with each of the following statements?

Unsure
 Disagree (1-3)
 Neutral (4)
 Agree (5-7)

RPRA consultations are helpful in informing and engaging me on important issues



RPRA is responsive to feedback received through consultations in their decision making



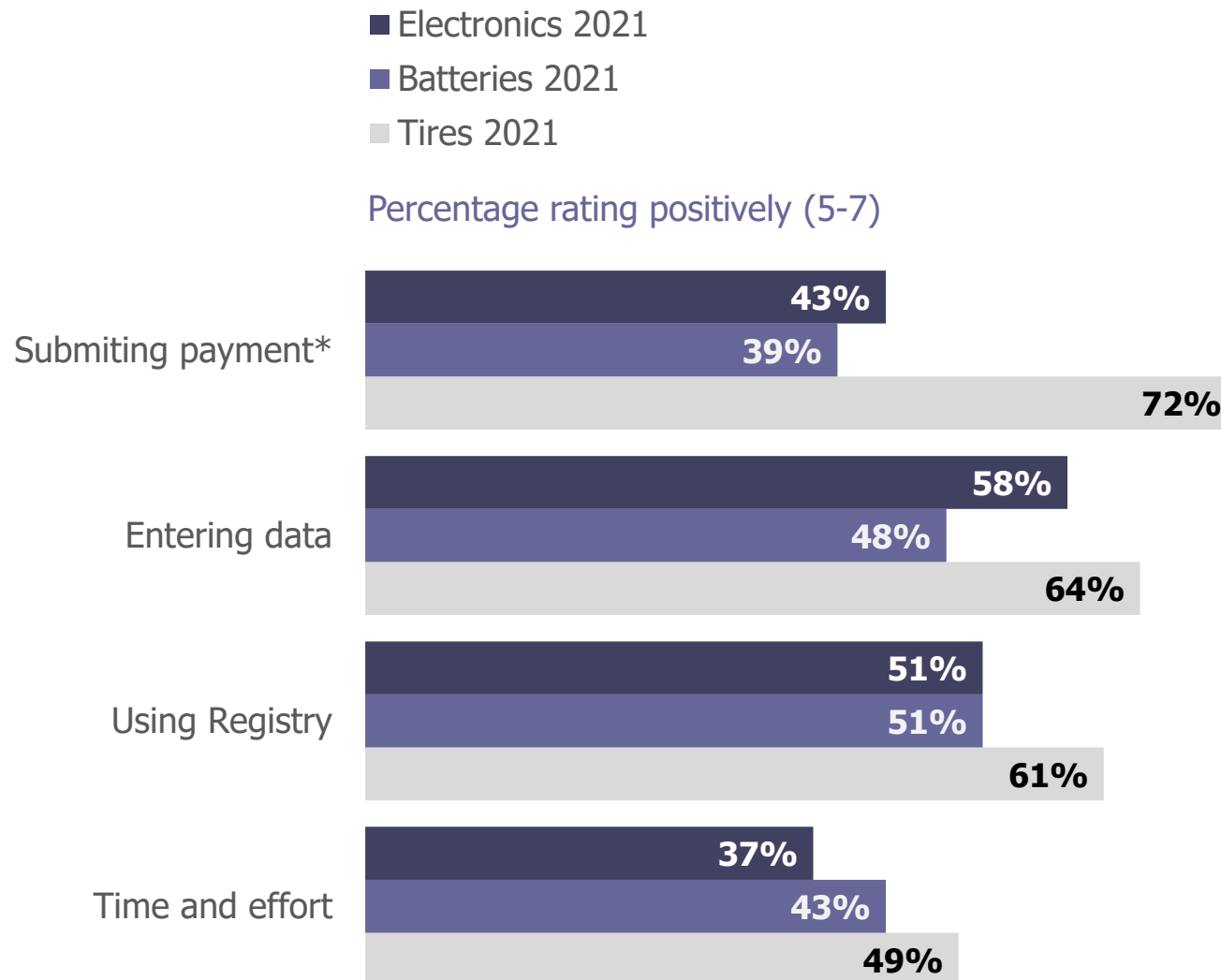
Reporting

- › Stakeholders rate the various dimensions of the reporting process favourably, especially Tires registrants.
- › The time and effort required for stakeholders appears to be a pain point (and may be related to the negative feedback on red tape presented earlier in the report).
- › A majority of stakeholders find the Registry to be user-friendly.
- › Understanding of reporting requirements and support from RPRA on reporting have seen strong improvement over 2019 and solid majorities are affirmative on both counts.
- › The idea that RPRA responsibly manages stakeholder data met with little resistance but a large number of stakeholders are unsure or neutral.



Rating Different Dimensions of the Reporting Experience

How would you rate your experience with each of the following aspects of the reporting process?



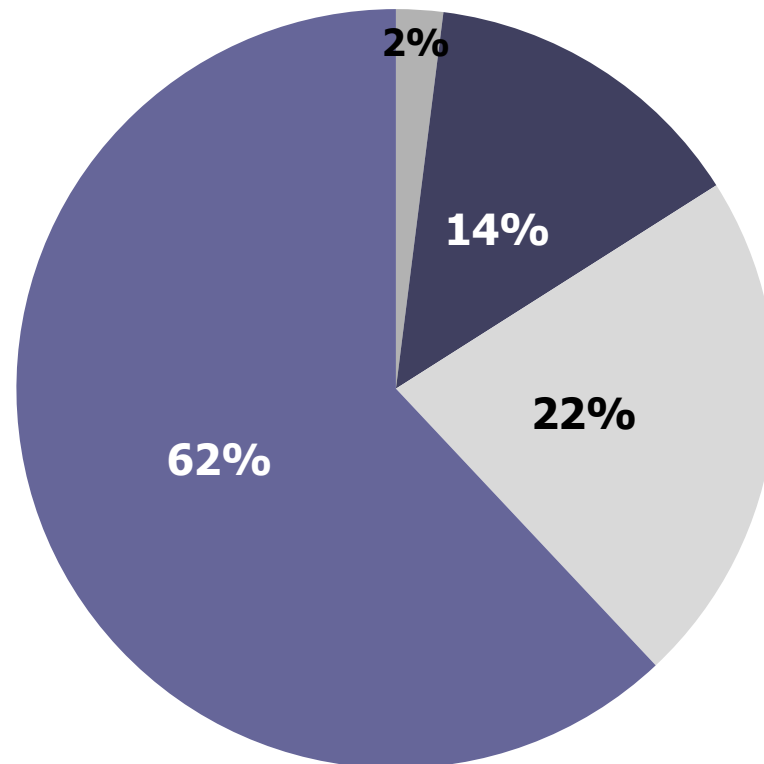
› Perhaps due to a greater level of reporting experience, Tires rate each of the dimension of reporting more favourably than Batteries and Electronics.



Registry User-Friendliness

Overall, how would you rate the Registry in terms of its user-friendliness?

■ Unsure ■ Poor (1-3) ■ Neutral (4) ■ Good (5-7)



> All registrant groups rate the user-friendliness of the Registry highly with a similar, if somewhat modest, level of favourability.

Tires 2021



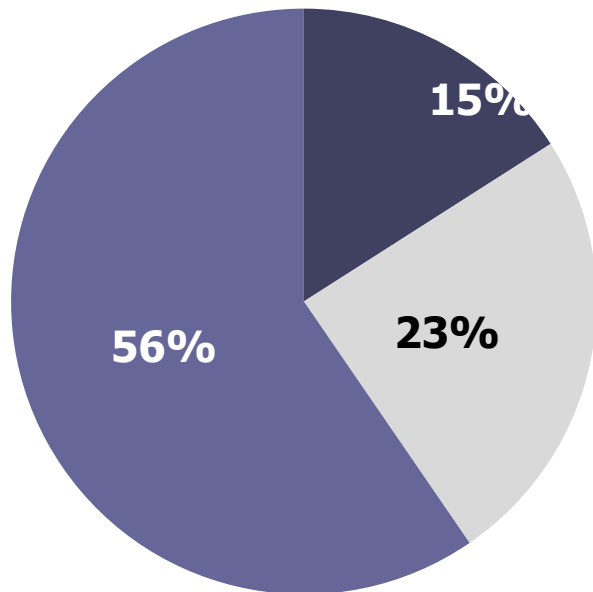
Registry User-Friendliness

Overall, how would you rate the Registry in terms of its user-friendliness?

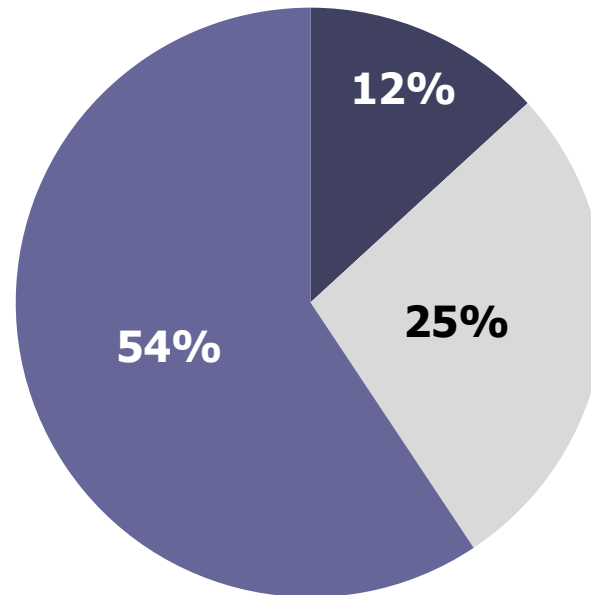
■ Poor (1-3)

■ Neutral (4)

■ Good (5-7)



Batteries 2021



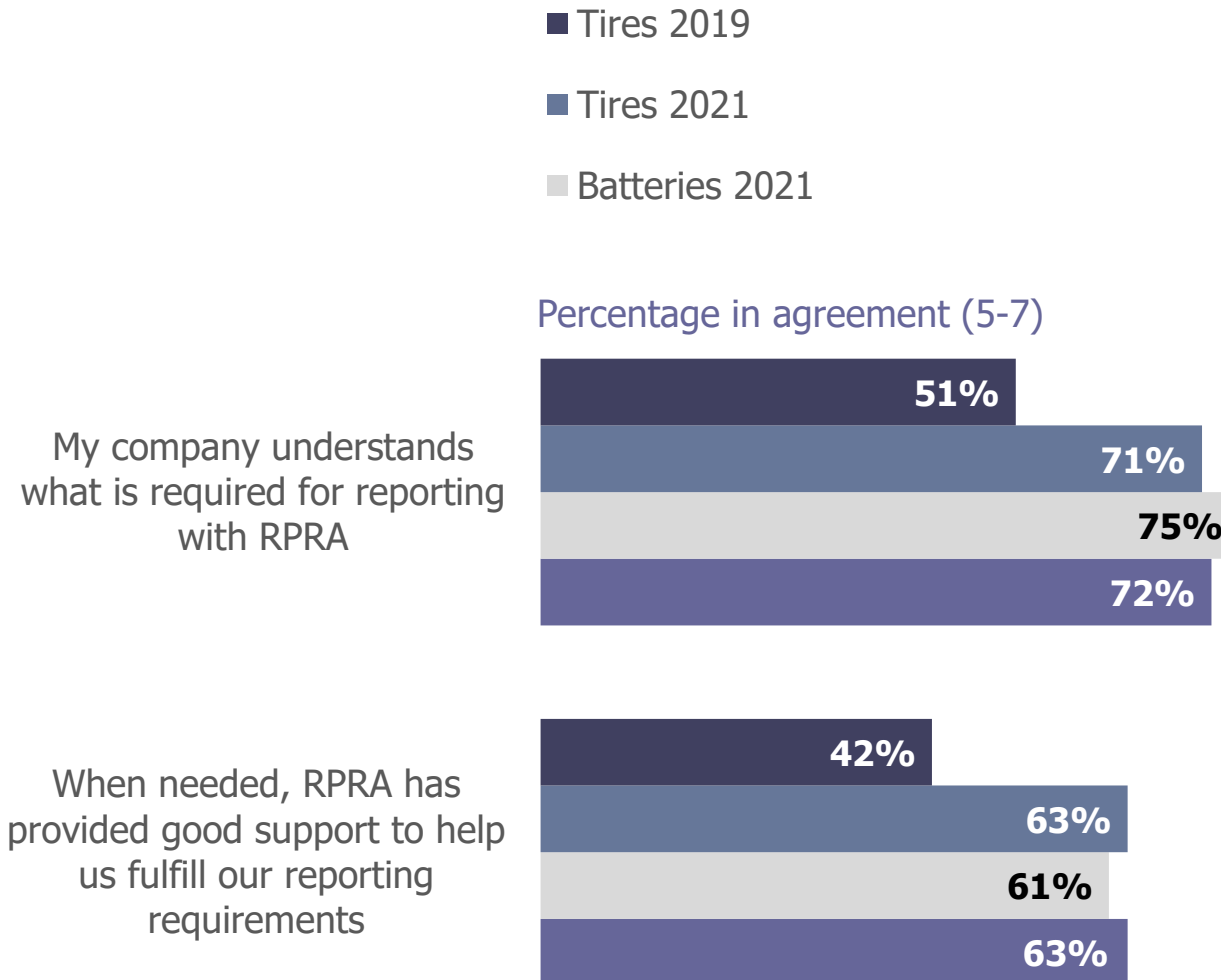
Electronics 2021

- › All registrant groups rate the user-friendliness of the Registry highly with a similar, if somewhat modest, level of favourability.



Understanding and Support around Reporting

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

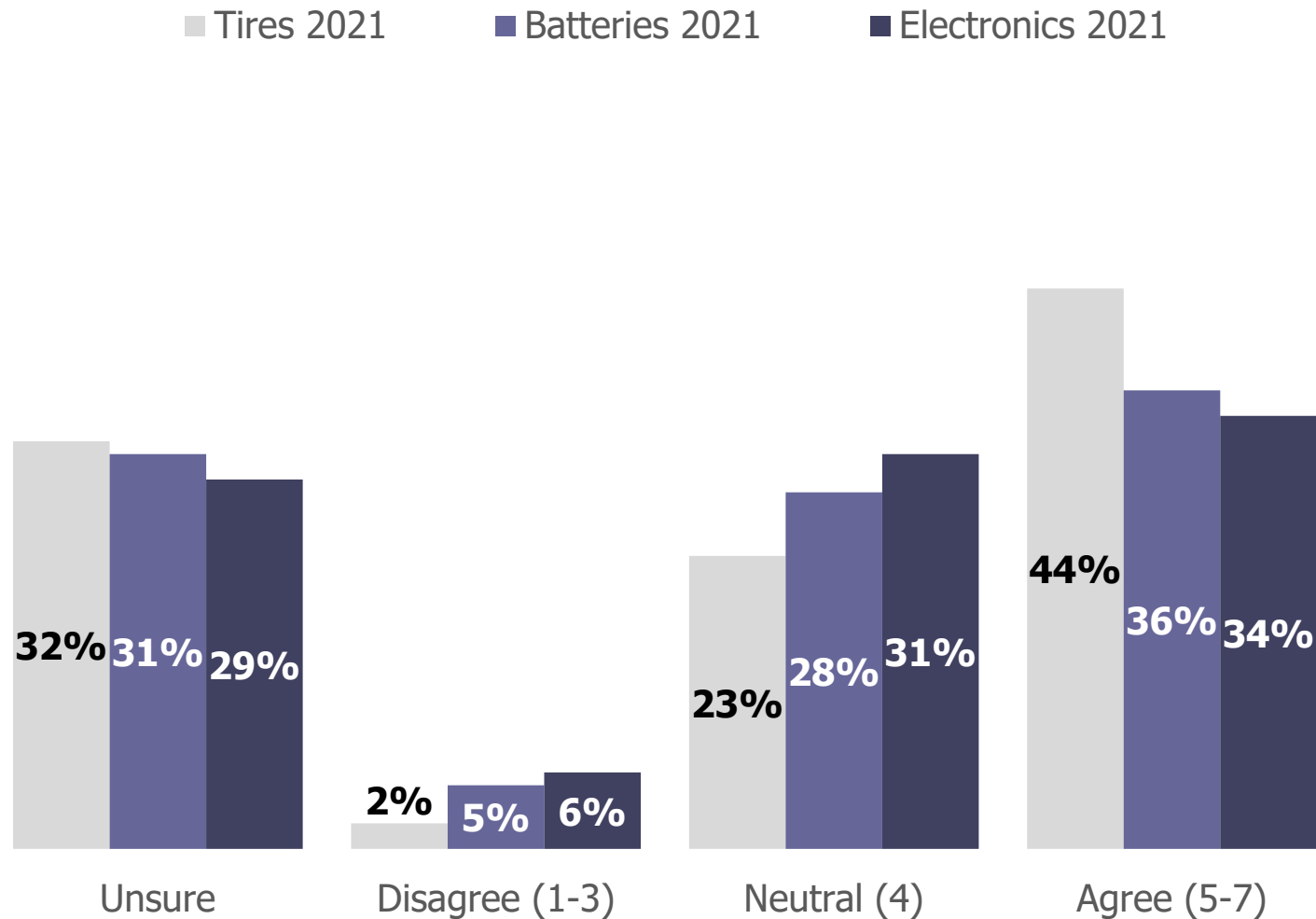


- > The results on reporting show significant improvement since 2019.
- > In terms of registrants' understanding what is required for reporting and obtaining needed support from RPRA, agreement from both Tires and Batteries & Electronics is much higher than for Tires in 2019.



Data Management

How strongly do you agree or disagree with the following statement? RPRAs responsibly manage the data it obtains from its stakeholders



- > A sizable number of registrants in both surveys are unsure about how RPRAs manage stakeholder data.
- > Tires registrants, likely due to greater experience with RPRAs, are more likely to agree with this statement than Batteries and Electronics.

Fees

- › Fee-paying stakeholder attitudes towards fees have improved since 2019.
- › That said, there remains a sizable number who do not understand how fees are set.

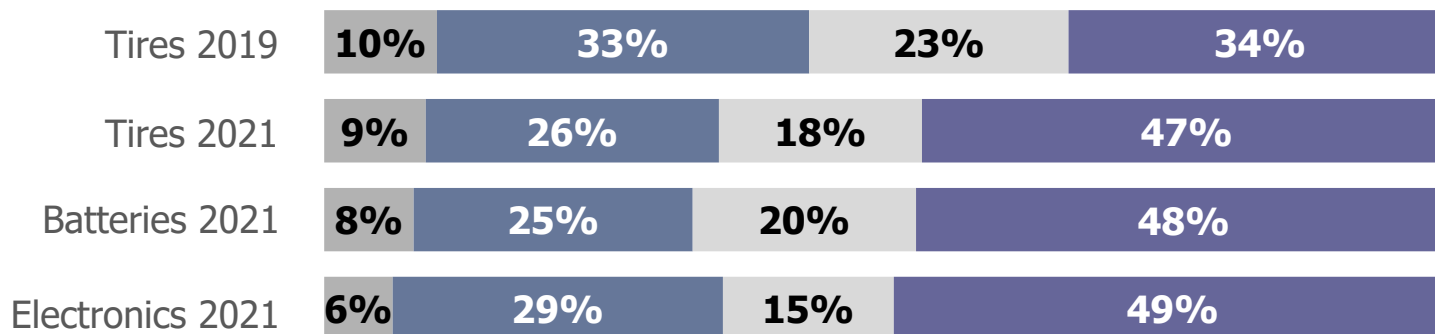


Fees

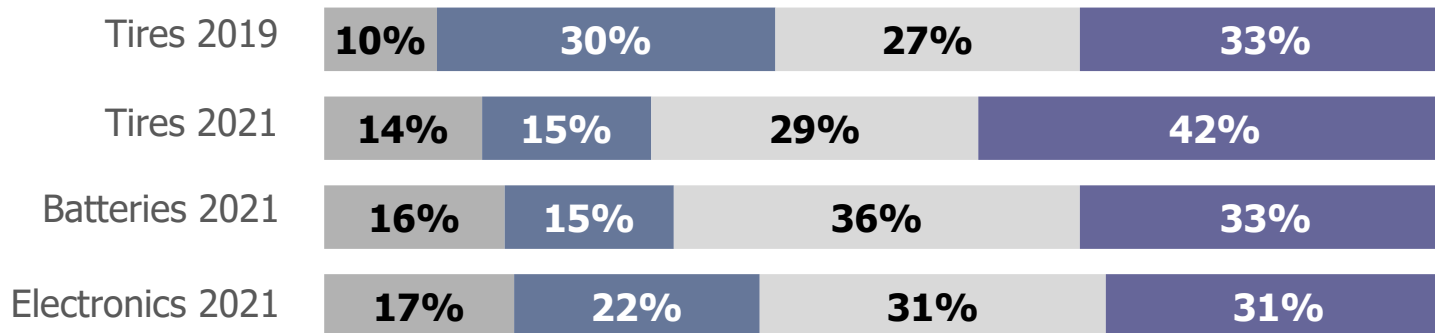
How strongly do you agree or disagree with each of the following statements?

■ Unsure ■ Disagree (1-3) ■ Neutral (4) ■ Agree (5-7)

I understand how RPRA's fees are set



RPRA's fees are fair and reasonable



- > Tires stakeholders showing improved understanding of fees with Batteries and Electronics at their improved level.
- > Tires registrants are more agreeable on the fairness of fees than Batteries and Electronics.