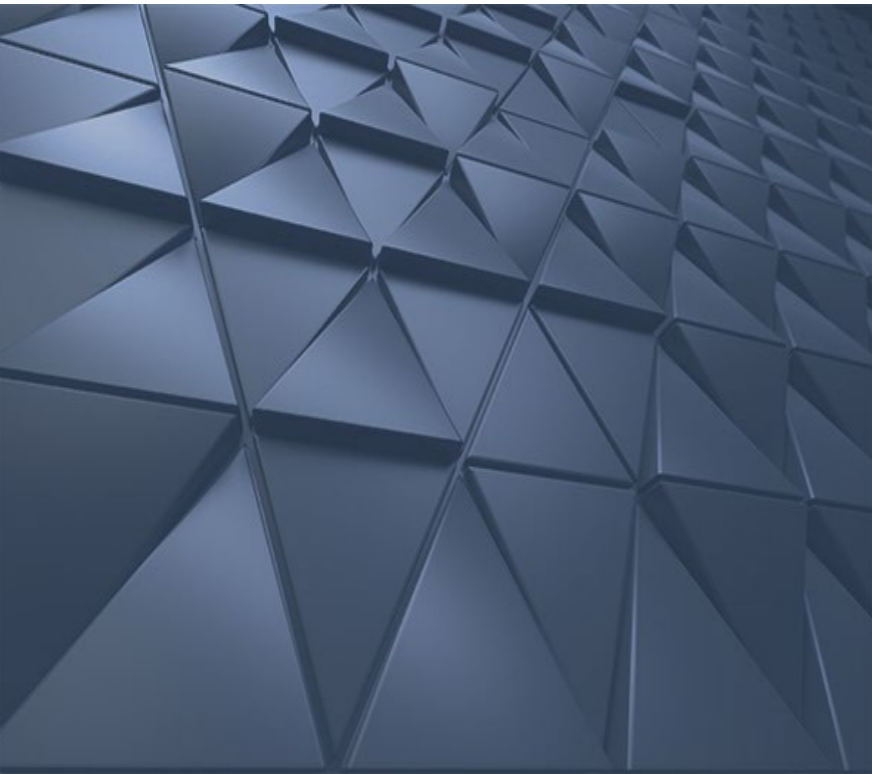




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R E S E A R C H

2022 RPRA REGISTRANT PERCEPTION SURVEY

Final Report
February 6, 2023



Introduction

This presentation presents the key findings from the 2022 RPRA Registrant Surveys.

The results will be presented across various survey themes:

- Reputation
- Performance
- KPIs
- Communications
- Reporting
- Support for Mandate, Individual Producer Responsibility (IPR) and Circular Economy (CE)

For each of these survey topics, we will present both the year-over-year tracking and the breakouts for the five program areas surveyed.

Methodology

This survey used the same methodology as past baseline/tracking surveys.

- Invitations to the survey were sent via email. The survey was conducted online and could also be completed on mobile devices. Prior to the initial survey invitation, RPRA sent an advanced communication informing registrants of the survey. Respondents received an initial email invitation followed by two email reminders.

Tracking Survey (Tires, Batteries, ITT/AV):

- The survey ran from September 8 to October 2, 2022. The overall sample for the survey is 202 cases. 1,477 invitations were sent for a final response rate of 14 per cent.
- By program area, the sample breaks down as follows (there is some overlap between these groups): Tires (118), Batteries (61), and ITTAV (65). The sample can also be broken down by registrant type as follows (there is overlap between these groups): Producers (137), Producer Responsibility Organization (PRO) (16), Hauler (51), Processors (13), Retreaders (9), Refurbishers (9).

Baseline Survey (Blue Box, Hazardous Special Products (HSP)):

- The survey ran from November 30, 2022 to January 11, 2023. The overall sample for this survey is 228 cases. 2,750 invitations were sent for a final response rate of 8 per cent.

The response rates for these surveys are reasonably strong. For instance, typical banking CRM online surveys generate 1 to 3 per cent response rates.

The results for the two surveys were merged for reporting top-line results in the report. The total sample for the combined surveys is 430 cases. These data have a margin of error of plus or minus 4.4%, 19 times out of 20. This margin of error increases for the subgroup breakouts for program areas shown in the report.

Overview of Key Findings

Overall, results from the 2022 registrant surveys are slightly worse than in 2021. Many indicators show a small drop from the previous year, while others are steady.

- Importantly, the addition of two new registrant groups (HSP and Blue Box) has had a significant impact on this broad trend. As with past baseline measurements, there are higher levels of neutrality associated with shorter-term participation in the new producer responsibility programs oversight by RPRA. This generally results in muted positive numbers but not higher negatives.

We find two broad and consistent trends in the survey data in terms of the different registrant groups:

- > Tires is generally the most favourable of the registrant groups with respect to RPRA. ITT/AV and Batteries are often more negative in their responses.
- > As noted above, HSP and Blue Box tend to be less positive in their responses but this is largely due to higher neutrality rather than greater negativity.

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 registrant relationships. Based on our experience and knowledge of the broader data, it is our opinion that RPRA performs as well as comparable organizations at a similar stage of development.

Key Findings

Reputation

Reputation findings have decreased with the inclusion of Blue Box and HSP. The dip in overall impressions of RPRA is the change most affected with the inclusion of the two new program areas. Overall good impression drops from nearly half in 2021 to 38% this year.

- › HSP and Blue Box are significantly lower than the other program areas in terms of favourability.
- › Like past baseline surveys for the Tires, Batteries and ITT/AV, there is a high level of neutrality for the newer registrants.

The number of registrants who feel RPRA is a trusted authority has decreased slightly from 2021.

- › This dip in agreement is affected by the Blue Box baseline result.

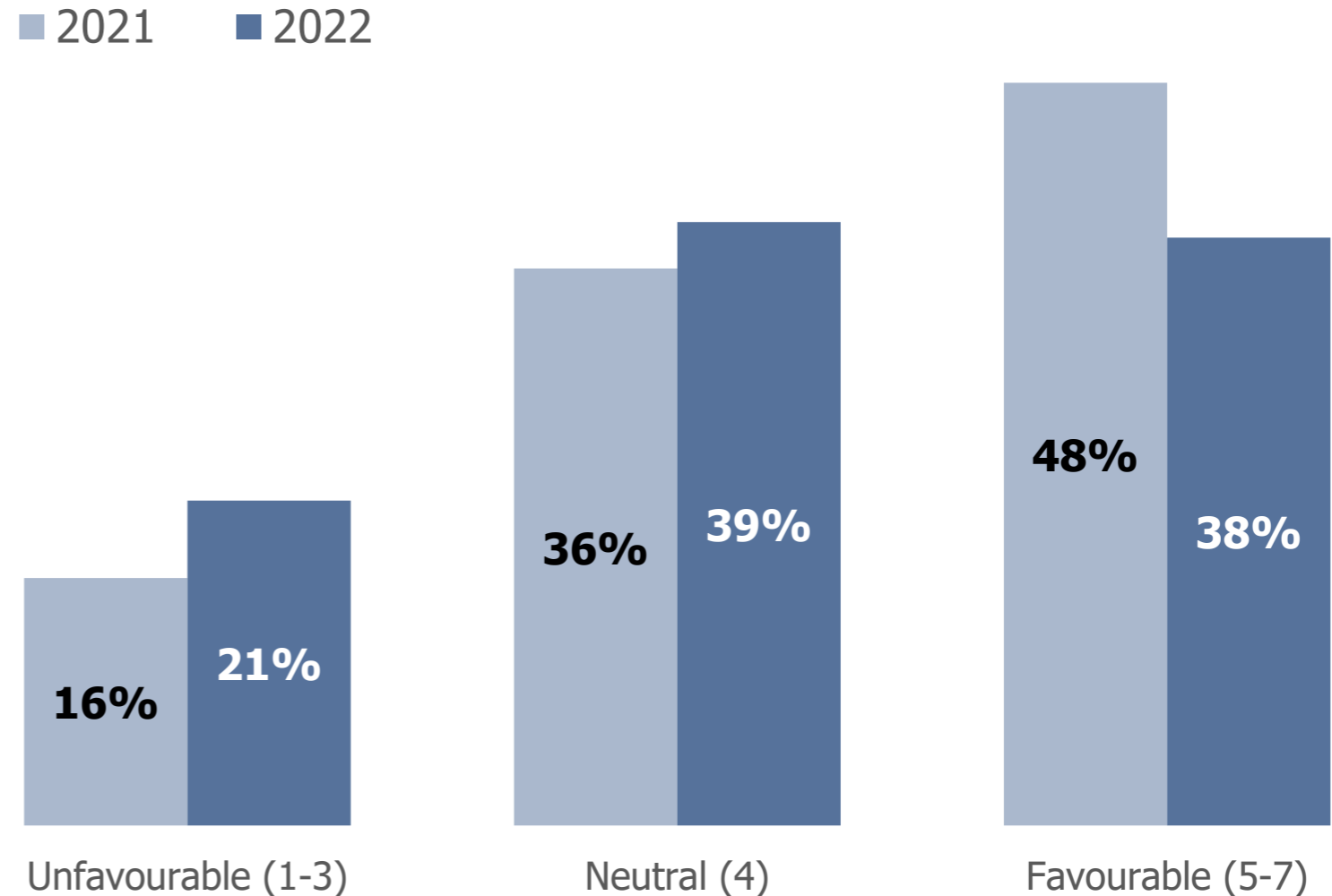
Transparency has seen a negative shift over the past year; fewer see RPRA as transparent and just under a quarter now disagree that RPRA is transparent in its decision-making.



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

Overall Reputation

- › There has been a downturn in overall impressions of RPRA. This is almost entirely the result of the less positive results for the two new program areas (BB and HSP).
- › Service providers are significantly more positive about RPRA than are producers (46% vs. 35% favourable, respectively).





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

Reputation by Program Area

- › As noted for the tracking results, HSP and Blue Box are much less positive in their impressions of RPRA than the other program areas.
- › Importantly, however, this is not because they are each more negative about RPRA. As with past baseline measurement for new registrants, they tend to have a higher neutral rating.

	Unfavourable	Neutral	Favourable
Tires (n=118)	17%	36%	43%
Batteries (n=70)	26%	27%	47%
ITTAV (n=71)	24%	30%	45%
Blue Box (n=213)	20%	46%	33%
HSP (n=69)	25%	35%	39%

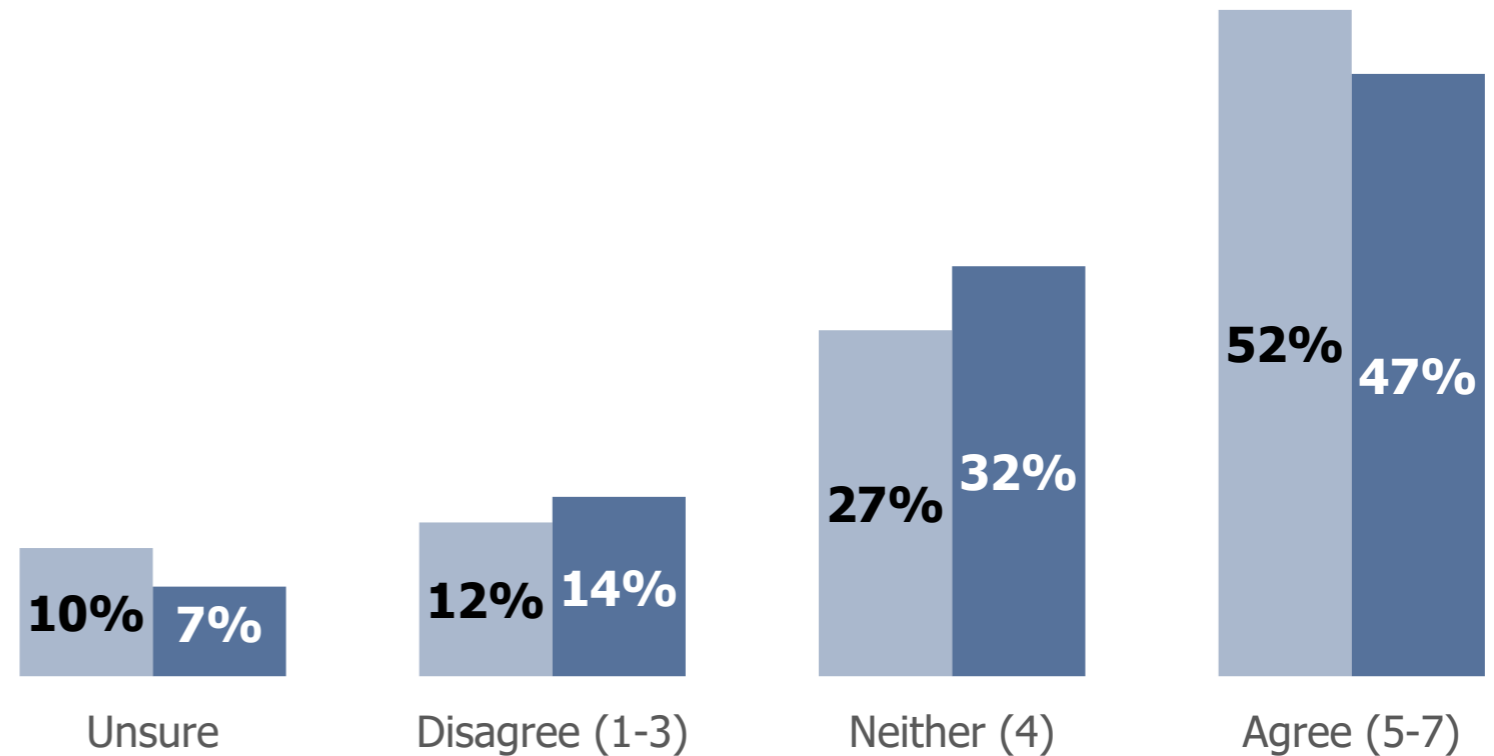


How strongly do you agree or disagree ... RPRA is a trusted authority?

Trusted Authority

- › Just under one half of registrants agree that RPRA is a trusted authority. This represents a slight dip from 2021.
- › Service providers and producers are virtually identical on this metric.

■ 2021 ■ 2022





How strongly do you agree or disagree ... RPRA is a trusted authority?

Trusted Authority by Program Area

- › New registrants, HSP and Blue Box, are somewhat less likely than other registrants to view RPRA as a trusted authority.

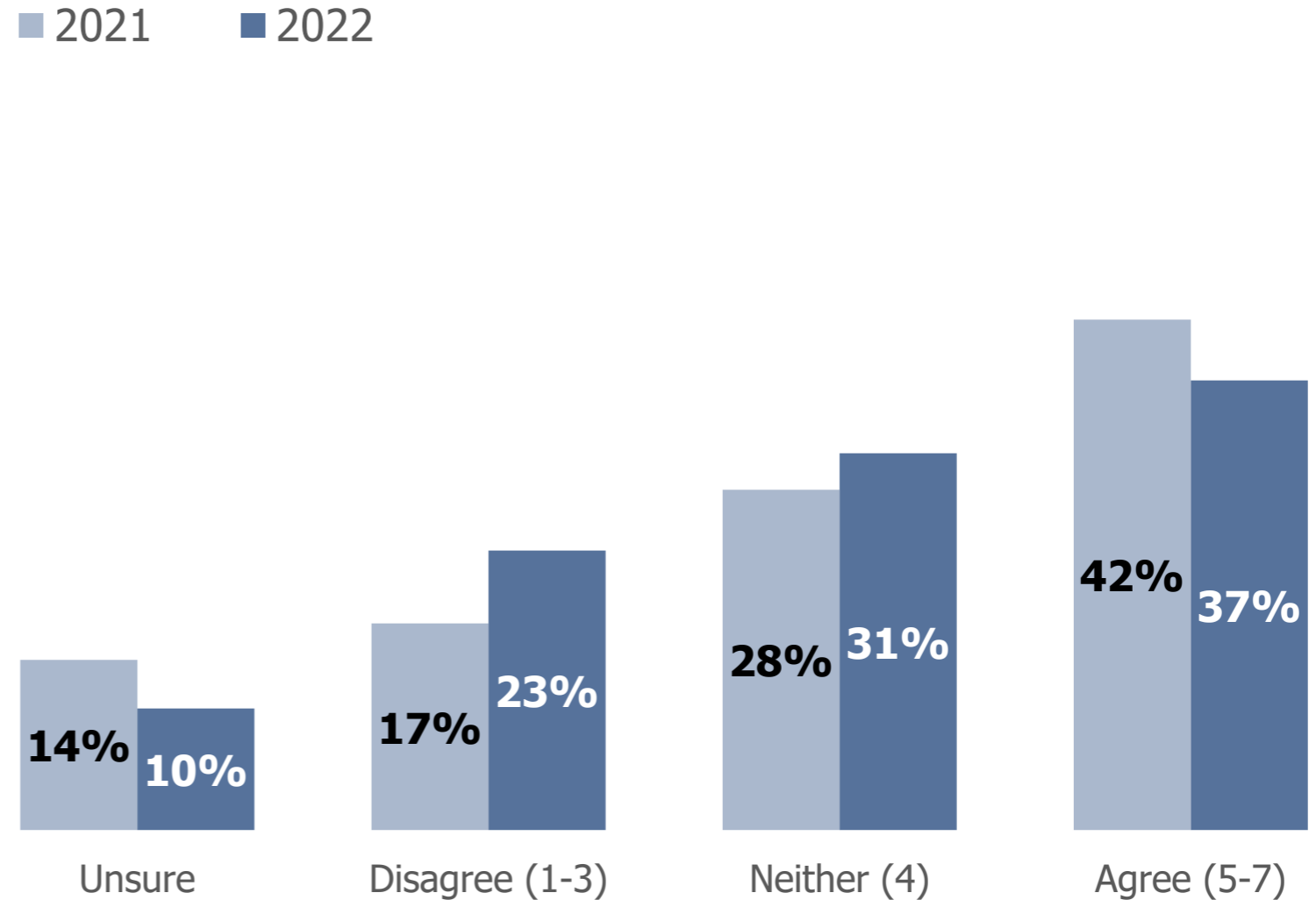
	Unsure	Disagree	Neither	Agree
Tires (n=118)	8%	15%	27%	49%
Batteries (n=70)	7%	14%	29%	50%
ITTAV (n=71)	1%	14%	30%	55%
Blue Box (n=213)	8%	15%	34%	44%
HSP (n=69)	6%	20%	28%	46%

Transparency

- › With an upswing in disagreement since last year, almost a quarter of registrants now see RPRA as lacking transparency.
- › Service providers are more likely than producers to see a lack of transparency (32% vs. 21% disagreement, respectively).



How strongly do you agree or disagree ... RPRA is transparent in how it makes decisions?





How strongly do you agree or disagree ... RPRA is transparent in how it makes decisions?

RPRA Transparency by Program Area

- › At upwards of one-third, Batteries and ITTAV are significantly more likely to view RPRA as lacking in transparency as compared with other registrant groups.
- › Blue Box and HSP, as well as Tires, register relatively high neutrality on this measure.

	Unsure	Disagree	Neither	Agree
Tires (n=118)	13%	21%	29%	37%
Batteries (n=70)	9%	34%	17%	40%
ITTAV (n=71)	6%	37%	23%	35%
Blue Box (n=213)	9%	22%	33%	37%
HSP1 (n=69)	6%	26%	30%	38%

Performance

The year-over-year data on RPRA's performance metrics reveal some mixed results.

- › A solid majority continue to rate RPRA positively on fulfilling its mandate.
- › As in 2021, a solid majority are satisfied with their interactions with the Compliance and Registry Team (although this has caused a slight decline in aggregate results with the inclusion of the new program registrants).
- › The number of Registrants who rate their reporting experience positively is steady.

In other performance areas, the survey shows worsened performance from 2021:

- › Ratings for interactions with RPRA have declined slightly (from just under three-quarters positive to two-thirds).

Gap analysis between expectations and performance reveal increases across all attributes and the following priority areas:

- › Understanding Registrants' business needs, clarity of communications, responsiveness, being fair and accessibility.
- › Responsiveness and accessibility have seen a significant increase and are now both among the top priority areas.

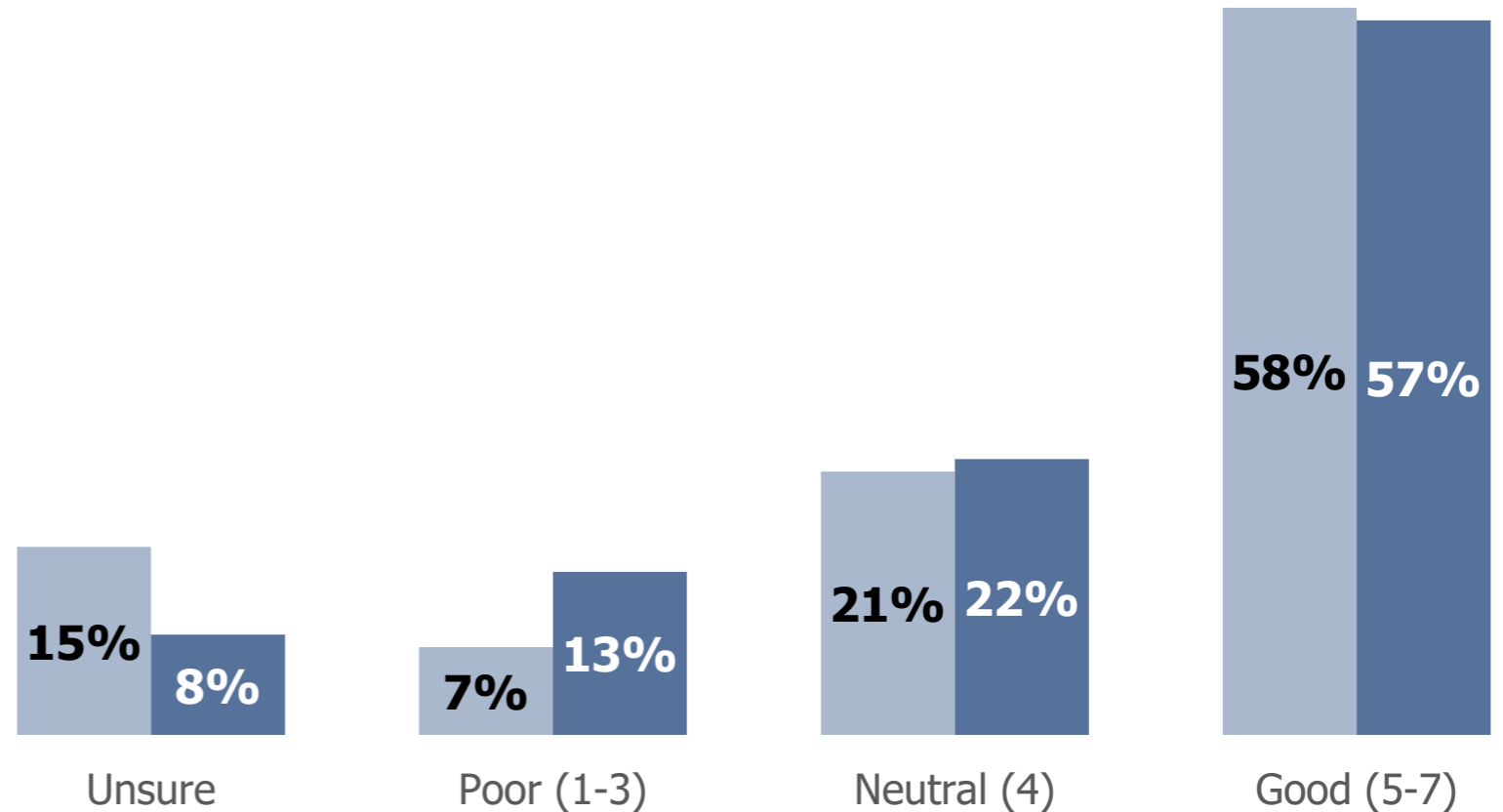
Rating RPRA on Fulfilling its Mandate

- › There is no change in the number of registrants who rate RPRA positively on fulfilling its mandate, although there has been an upswing in the number negative ratings.
- › Service providers are more likely to rate RPRA poorly on this metric than producers (20% vs. 11%, respectively).



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

■ 2021 ■ 2022





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

Mandate Fulfillment by Program Area

- › Each of the longer-term registrants rate RPRA more positively than the newer ones on fulfilling its mandate.
- › While Blue Box and HSP registrants have lower positive ratings, they do not have higher negatives. Rather, they have a relatively high level of neutrality.

	Unsure	Poor	Neutral	Good
Tires (n=118)	12%	12%	15%	61%
Batteries (n=70)	4%	17%	14%	64%
ITTAV (n=71)	3%	10%	21%	66%
Blue Box (n=213)	7%	13%	28%	53%
HSP (n=69)	9%	14%	28%	49%

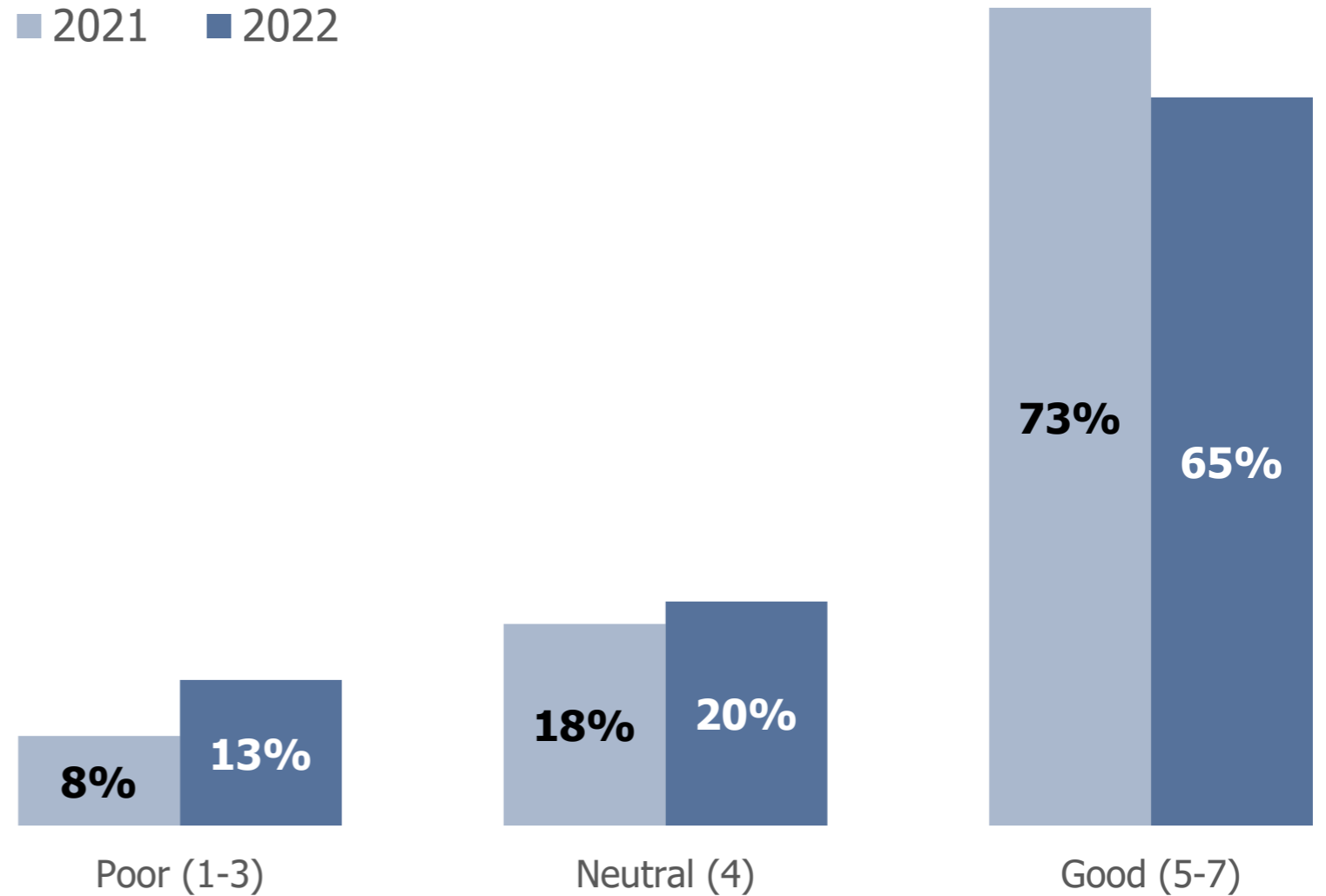


Thinking about the interactions you have had with RPRA to date, how would you rate these interactions overall?

Rating Interactions with RPRA

- › While two-thirds of Registrants rate their interactions with RPRA positively, this has dipped somewhat over the past year.
- › Producers are significantly more positive than service providers (67% vs. 54%, respectively).

■ 2021 ■ 2022





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

Interactions with RPRA by Program Area

› Ratings for interactions with RPRA are consistent across program areas.

	Poor	Neutral	Good
Tires (n=118)	14%	19%	66%
Batteries (n=70)	14%	17%	67%
ITTAV (n=71)	14%	21%	65%
Blue Box (n=213)	12%	22%	64%
HSP (n=69)	12%	16%	71%

Gap Analysis: Performance versus Expectations

The survey measures expectations and performance on nine attributes. The gap analysis is created by subtracting the top-two box on expectations from the good ratings on performance.

Gap analysis shows increased gaps across all attributes. The most notable gap increases are with responsiveness and accessibility.

- › It is notable that these gaps would be better if not for the inclusion of new program registrants (HSP and Blue Box) who have lower positive performance ratings.

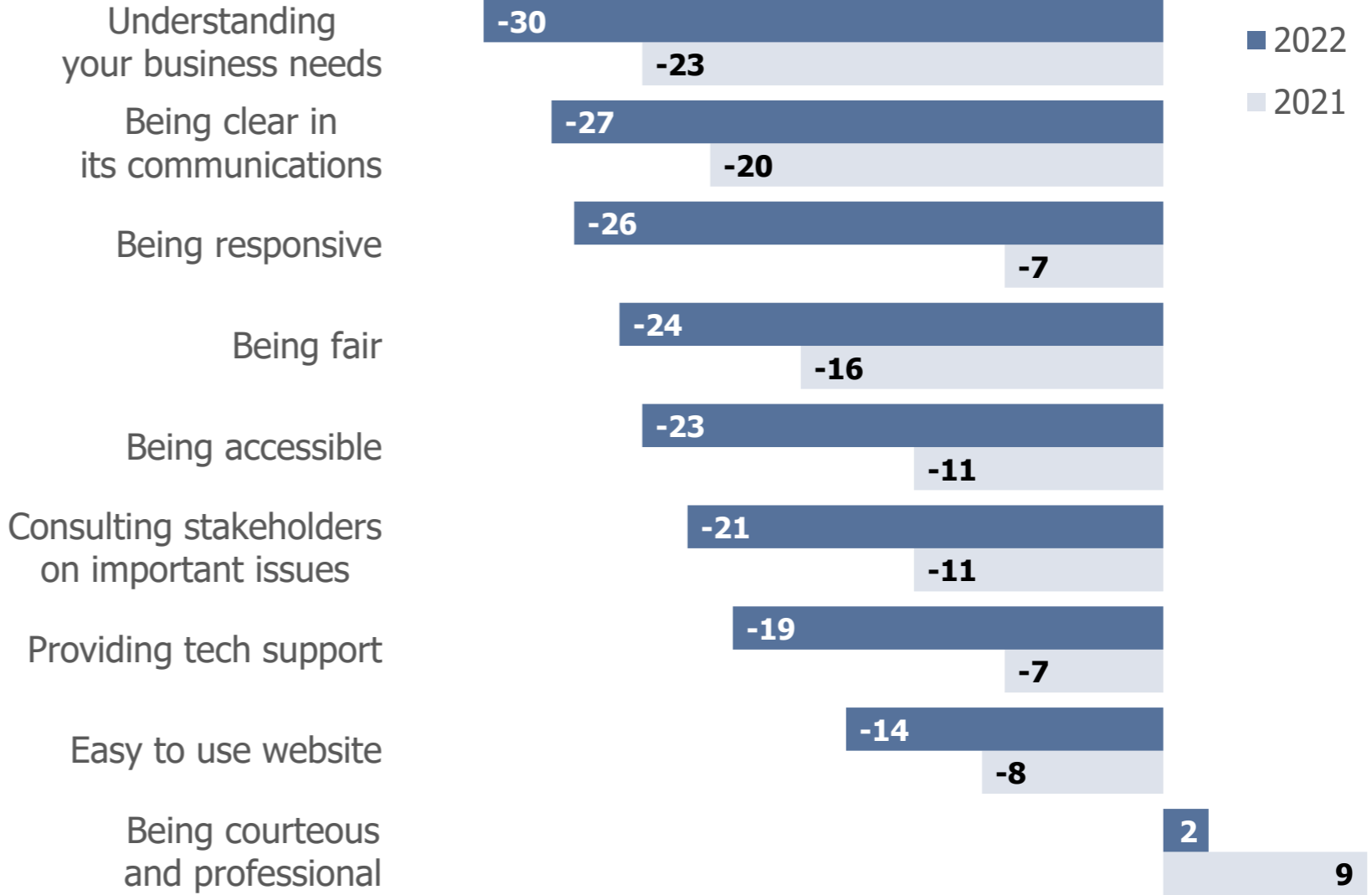
Gap analysis is useful for identifying key priorities for registrant relations. The key priority areas identified for this year's results are:

- › Understanding registrants' business needs, clarity of communications, responsiveness, being fair and accessibility.
- › Responsiveness and accessibility have seen a significant increase in the gap between registrant expectations and rating of RPRA's performance and are now both among the top priority areas.



Gaps Between Performance and Expectations

- › Gaps between performance and expectations worsened for each attribute.
- › These worsening scores are affected to a definite extent (as shown in the following slide) by the registrants of the most recently transitioned programs (HSP and BB).
- › Of particular concern are the large increased gaps for responsiveness and accessibility.
- › In addition to responsiveness and accessibility, understanding Registrants' businesses and clarity of communications remain top priorities.





Gaps Between Performance and Expectations

- › Gaps between performance and expectations are steady in many areas but have worsened in others.
- › Of particular concern are the large increased gaps for responsiveness and accessibility.
- › In addition to responsiveness and accessibility, understanding Registrants' businesses and clarity of communications remain top priorities.

	Overall	Tires (n=118)	Batteries (n=70)	ITTAV (n=71)	Blue Box (n=214)	HSP (n=69)
Understanding your business needs	-30	-25	-28	-27	-38	-32
Being clear in its communications	-27	-25	-20	-18	-34	-36
Being Responsive	-26	-25	-18	-24	-30	-27
Being fair	-24	-26	-26	-24	-36	-30
Being accessible	-23	-27	-13	-16	-29	-29
Consulting Registrants on Important Issues	-21	-21	-27	-31	-28	-32
Providing Tech Support	-19	-19	-20	-20	-28	-14
Easy to use website	-14	-18	-6	-5	-20	-13
Being courteous and professional	2	5%	7	8	-5	18

Communications and Reporting

Ratings of the communications products remains strongly positive overall, although they have dipped in some areas (emails, FAQs).

- › Videos continue to receive the highest (and improved) ratings.
- › As found elsewhere in the survey, newer registrants generally rate communications products somewhat lower than longer-term registrants.

Overall rating of companies' reporting experience is steady at just under 3 in 5.

In terms of the Registry:

- › There has been improvement in ratings for reporting along most dimensions measured: using the registry, entering data, and time and effort.
- › User-friendliness of the Registry is rated more or less the same as in 2021 with over one half positive.

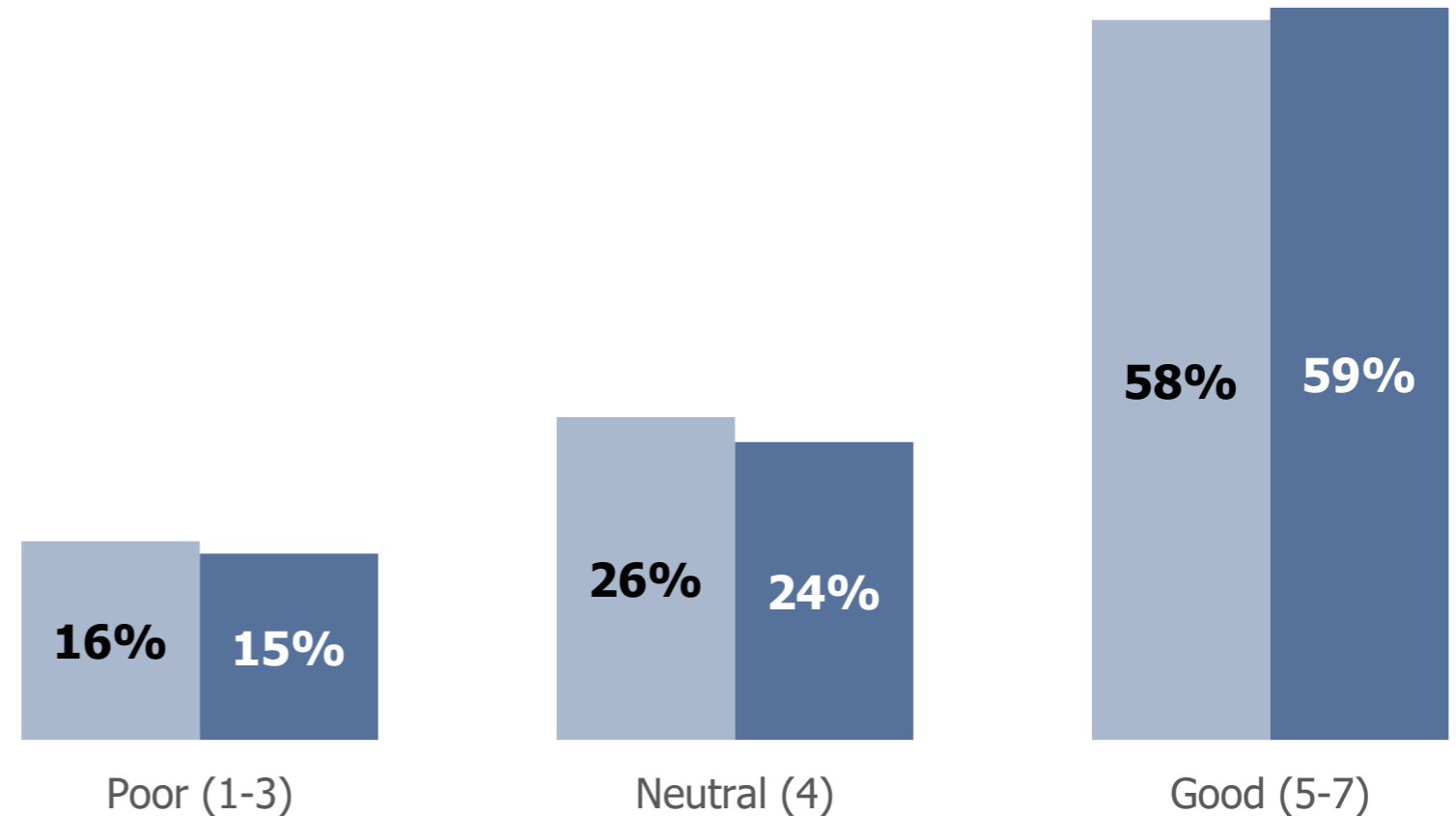


Overall, how would you rate your company's reporting experience with RPRA?

Rating of Reporting Experience

- › Rating of registrants' reporting experience with RPRA is steady over the past year.
- › There is no difference between service providers and producers on reporting experience.

■ 2021 ■ 2022





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

Rating Reporting Experience by Program Area

- › Ratings of reporting experience vary somewhat across program areas, from a low of 53% positive with HSP to a high of 69% with Tires.
- › Both Batteries and ITTAV both show higher a level of negative ratings on reporting when compared with other registrants.

	Poor	Neutral	Good
Tires (n=118)	11%	16%	69%
Batteries (n=70)	23%	19%	57%
ITTAV (n=71)	20%	15%	62%
Blue Box (n=214)	14%	31%	55%
HSP (n=69)	15%	29%	53%

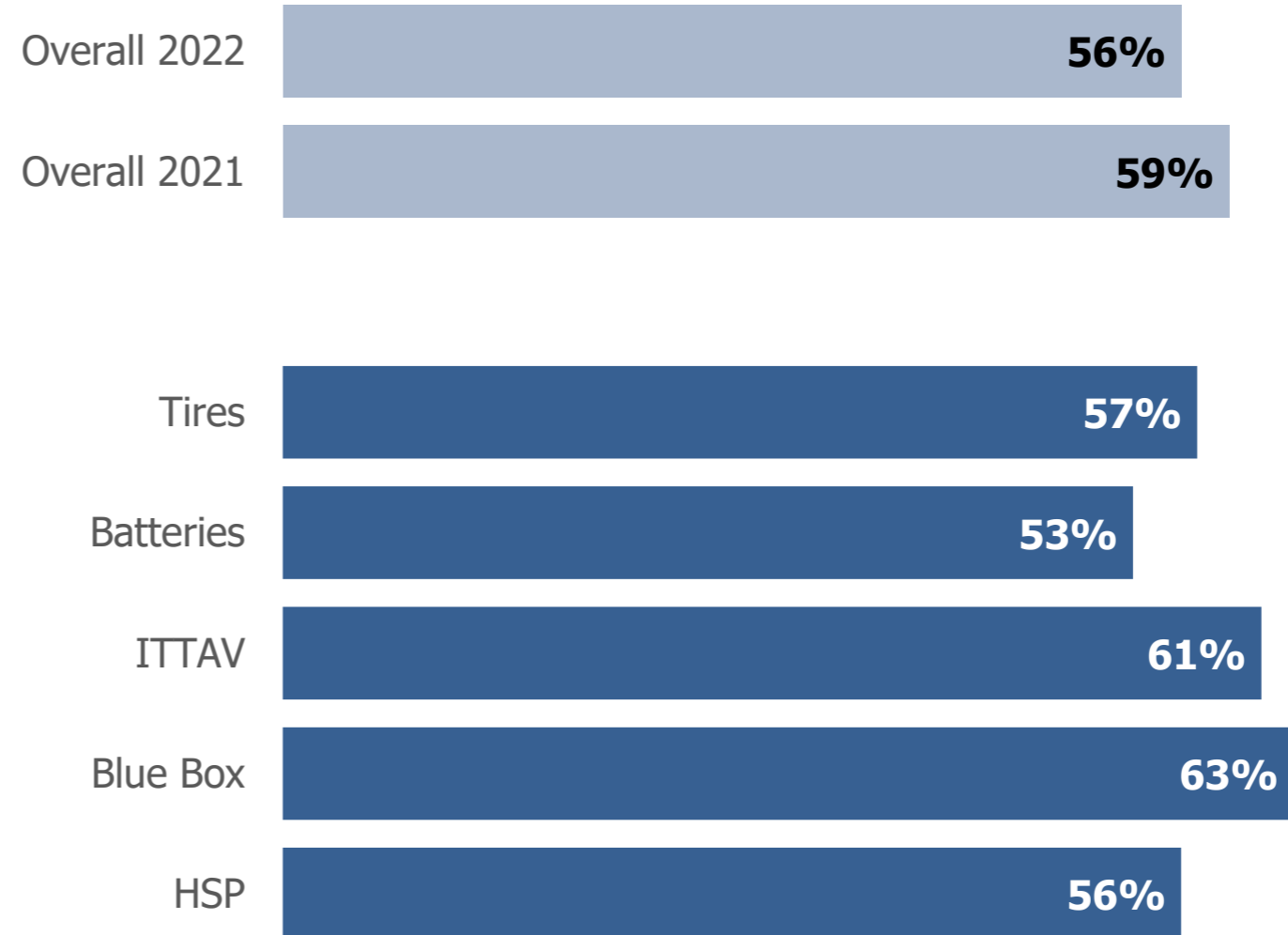
Registry User-Friendliness

- › Just under 3 in 5 registrants rate the user-friendliness of the Registry positively.
- › There has been a slight dip for Tires and Batteries and a small bump for ITTAV since last year.



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

Positive (5 to 7 on 7-point scale)



Key Performance Indicators

The survey generates three KPIs.

- › **Performance KPI:** tracked for each survey.
- › **Registry Services KPI:** **new for this year*
- › **Education and Awareness KPI:** **new for this year*

This section presents the results for each of these KPIs along with an explanation of how each metric is constructed.

Performance KPI

The Performance KPI measures year-over-year performance by RPRA using key performance indicators.

When this performance metric was first developed, tracked and reported on, the non-response was treated as neutral and worked into the mean scores for calculating the KPI.

The KPI has been recalibrated by removing the non-response from the calculations. This was done because there is year-over-year variability in the non-response and between program areas resulting in a slight bias.

The 2019 and 2021 Performance KPI results have also been recalibrated, resulting in a lower score than previously reported to the Board.

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

Three variables are used for the Performance KPI are:

- **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?”

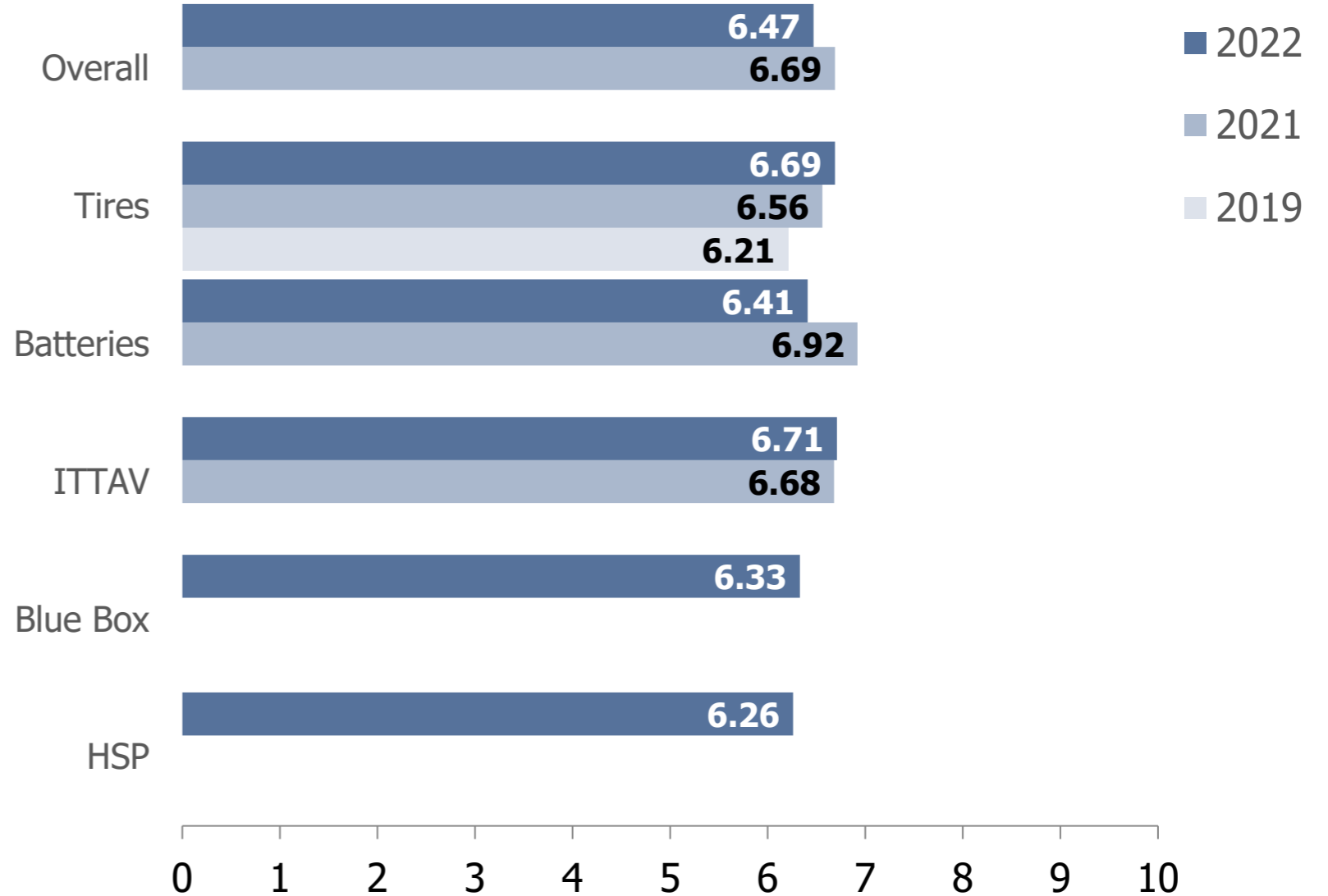
Performance KPI

- › Reflecting the general trend of this year’s survey, the Performance KPI has pulled back slightly overall.
- › As can be seen in this chart, however, the relative low 2022 scores for Blue Box and HSP are driving the decrease in the overall result.
- › That said, Batteries has seen a drop in its KPI, while Tires has improved and ITTAV is steady.



Performance KPI is an index of three survey variables: reputation; mandate fulfillment, and; support with compliance.

Note on overall data: 2022 all five program areas; 2021 just Tires, Batteries and ITTAV.



Registry Services KPI

The Registry Services KPI measures performance of Registry services.

This KPI uses four ratings variables:

- “Overall, how would you rate the Registry in terms of its user-friendliness?”
- Rating the company’s experience with the Registry on the following dimensions:
 - “Logging in/using the Registry”
 - “Entering your data”
 - “The amount of time and effort it requires”

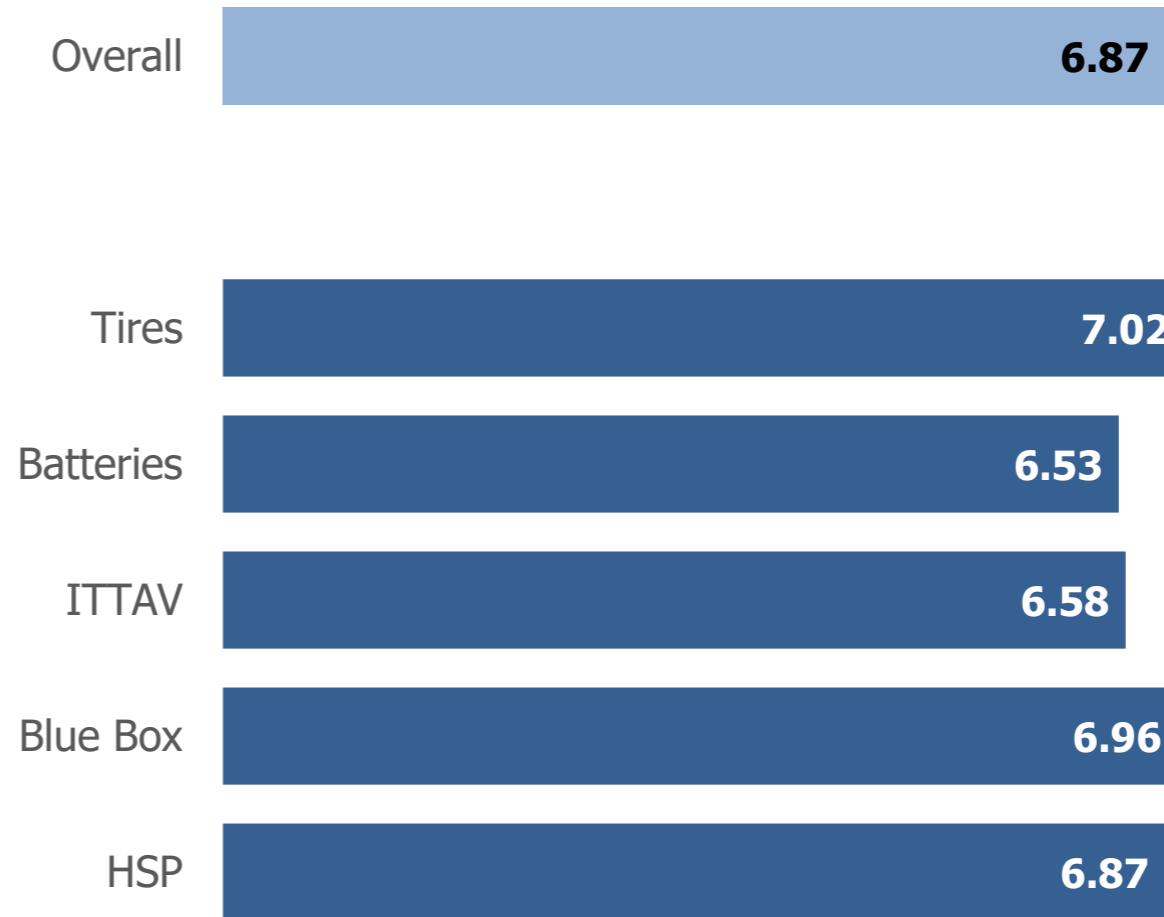
The KPI is calculated by taking an average of the mean scores for each of these variables and then calibrating it to be a score out of 10 (rather than the 7-point scale used for the means).

Registry Services KPI

› Registry Services KPI rates higher than the overall performance KPI.



Registry Services KPI is an index of four survey variables: Logging in/using the Registry, Entering your data, The amount of time and effort it requires and Registry user-friendliness



Education and Awareness KPI

The Education and Awareness KPI measures communications engagement and performance.

Three main variables used for this KPI:

- **Usage of communications products:** “Have you used or referenced any of the following RPRA communications products? (RPRA website, FAQs reporting or registration guides emails from RPRA, videos)”
- **Rating of communications products:** “How would you rate each of these in terms of their usefulness? (RPRA website, FAQs reporting or registration guides emails from RPRA, videos)”
- **Overall communications performance:** “Still thinking about your interactions with RPRA, how would you rate your experience across the following dimensions? Clarity of communications from RPRA”

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). The first variable is used as a count of the number of communications products used. The ratings across all of the various products are blended into an overall mean score prior to calibrating to 10.

Education and Awareness KPI

› The Education and Awareness KPI is the highest rated of the three reported KPIs.



Education and Awareness KPI is an index of three survey variables: usage of communications products, rating for these products, and clarity of communications from RPRA.



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Real answers from real people