



**Canada Border
Services Agency**

**Agence des services
frontaliers du Canada**

PUBLIC OPINION AND UX RESEARCH FOR CANADA BORDER SERVICES AGENCY FINAL REPORT

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Ce rapport est aussi disponible en français.

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This report presents the results of a UX study conducted with employees of the Canada Border Services Agency (CBSA) and a user study conducted with visitors to the “Travellers section” of the CBSA's website conducted by Leger Marketing Inc. on behalf of Canada Border Service Agency. The research was conducted between January, 2019 and March, 2019.

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1. Executive Summary

Léger is pleased to present to the Canada Border Services Agency (CBSA) this report on the results of qualitative and quantitative studies conducted with CBSA employees and quantitative and qualitative studies conducted with visitors to the Travellers section of the CBSA's website.

This report was prepared by Leger who was contracted by Canada Border Services Agency (contract number 47419-195001/001/CY awarded January 14, 2018).

1.1 Background and Objectives

This public opinion research project is divided into two main sections: a section dedicated to the Agency's internal intranet (accessible only to employees) and a section dedicated to the Agency's external website (accessible to the general public).

Intranet

CBSA's Intranet (Atlas) is a major communication tool to inform employees (about 14,000) of the day-to-day business of the Agency as well as a resource for policies, guidance and direction. The content on Atlas is structured according to the organization rather than its functions, and therefore does not best meet the needs of the user.

Currently, Atlas content is built upon a division of branches and regions. This structure does not take users' requirements into consideration and creates repetition or an overlap of content across sections. As such, Atlas has become very difficult to navigate and search and often leads users to the wrong information, unsearchable data or a duplication of information. These factors result in a tremendous loss of time for employees.

The Intranet Public Opinion Research (POR) aspect of this project focuses on CBSA employees with the intent of gathering the information required to assist in rebuilding Atlas. The new site must be organized by audience and user tasks and not according to the organizational model.

Objectives of the Intranet Section:

- Asses satisfaction towards the Intranet;
- Learn more about expectations towards the Intranet;
- Know perceived usefulness of content in the Intranet;
- Qualify content types (topics) as useful, desired, proposed, or mandatory;
- Propose a modified information architecture that better reflects employees' understanding of the Intranet content.

Internet – Traveller Section of the CBSA website

Visitor data from the Travellers pages of the CBSA website shows that there are approximately 237,000 unique visitors per month. Most of the visitors access the website from Canada but many other visitors come from other countries. People visit the Travellers section to gather information on different subjects (what they can bring across the border, wait times, prohibited materials, etc.), and based on the available website data, it is known that the Nexus pages are among the most popular.

Objectives of the Internet Section:

- Asses visitors' satisfaction with the traveller's section of the CBSA websites;
- Identify the reasons for visiting the website
- Assess the clarity of the information on the site
- Identify sources of misunderstanding
- Identify navigation problems
- Evaluate how the Nexus section is used by visitors
- Identify potential areas for improvement of the traveller's section of the CBSA's website.

1.2 Methodology

To achieve the study objectives, a research plan based on a hybrid method, qualitative and quantitative, was developed.

1.2.1 Intranet Section

To achieve the objectives set for the Intranet portion of the study, we used a four-step methodology: 1) focus groups, 2) individual interviews, 3) persona creation, and 4) a tree structure test (reverse card sorting)

First, a qualitative methodology consisting of focus groups with the CBSA's employees was set up. It was followed by a series of one-on-one interviews and card-sorting exercise. These two first phases were the foundation of persona creation. Based on phases 1 and 2, a new information architecture was proposed for Atlas renewal. This new architecture was further tested with employees using a tree testing methodology, also known as reverse card sorting.

1.2.1.1 Six Focus Group

Leger conducted a series of six focus groups with CBSA employees. There were groups of employees recruited from (1) employees in the field, (2) employees from the regional HQs and (3) employees for the national HQ in Ottawa. All sessions were held in CBSA locations. Participants were recruited by CBSA. Each group session lasted approximately 120 minutes. Every session was recorded for analysis purposes. Leger was responsible for preparing the moderation guides and moderating the groups. The guide was developed in consultation with CBSA's project

authority. The groups were moderated in both French and English according to the needs of the employees. The guides and tools were available in both languages.

Participants were informed of all their rights under Canada’s *Privacy Act* and the Standards for the Conduct of Government of Canada Public Opinion Research. Specifically, their confidentiality was guaranteed, and their participation was voluntary. CBSA was responsible for ensuring the participation and availability of its employees for scheduled interview dates and times. There was no financial incentive to ensure the participation of CBSA employees.

Locations and dates

Groups were held in the following cities on the dates specified.

Table 1. Detailed Recruitment

City	Recruits	Participants	Target	Language	Date
Ottawa	10	8	HQ employees	EN/FR	January 28, 2019
Ottawa	10	7	HQ employees	EN/FR	January 28, 2019
Mississauga	10	9	HQ employees	EN	February 5, 2019
Toronto Pearson Int’ Airport	10	11	BSO	EN	February 5, 2019
Vancouver	10	4	BSO	EN	February 6, 2019
Vancouver	10	11	BSO	EN	February 6, 2019
Total	60	50			

1.2.1.2 One-on-one interviews

Leger conducted one-on-one interviews with participants of each main profile (employees in the field, employees from a regional HQ and employees from national HQ). Each interview lasted approximately 45 minutes. Every session was recorded for analysis purposes.

Leger was responsible for preparing the interview guide, preparing the card sorting exercise and conducting the interviews in English and French. The recruitment guide and card sorting exercise were developed in consultation with CBSA’s project authority.

Participants were informed of all their rights under Canada’s *Privacy Act* and the Standards for

the Conduct of Government of Canada Public Opinion Research. Specifically, their confidentiality was guaranteed, and their participation was considered voluntary. CBSA was responsible for ensuring the participation and availability of its employees for scheduled interview dates and times. There was no financial incentive to ensure the participation of CBSA employees.

Table 2. Detailed Recruitment

City	Recruits	Participants	Target	Language	Date
Montreal	5	5	HQ employees and BSO	EN/FR	February 6 and February 8, 2019
	5	5	HQ employees and BSO	EN	February 12, 2019
Ottawa	5	5	HQ employees	EN	February 15, 2019
Total	15	15			

1.2.1.3 Persona Creation

Based on the information collected in phases 1 and 2, we have created a set of six personas. The final number of personas has been dictated by the outcome of data analysis. The main objectives of personas are to efficiently present and share information related to intranet users.

Personas document several dimensions, such as:

- Employee role
- Technological profile
- Daily challenges
- Main frustrations with Atlas
- Short bio to give life to the persona

1.2.1.4 Tree testing

In this phase of the research, we evaluated an information architecture with Atlas users. The architecture that was evaluated was designed using the results of the focus groups and the card sorting done during the individual interviews. To perform this tree structure test, we used the *Treejack* tool of the *OptimalWorkshop* platform. CBSA employees who visited Atlas between March 12 and March 22 were invited to participate in the test via an open link. The tree testing consisted of ten tasks that employees were required to perform in the proposed information structure. The test was available in both French and English at the respondent's preference.

A total of 1,164 respondents took the test in English and a total of 200 in French. 434 users were frontline employees and 930 were not.

For each task, we measured several indicators, such as:

- Success rate and failure
- The paths
- The final destination

The detailed methodology is presented in Appendix.

1.2.2 Internet Section

Quantitative Methodology

In order to meet the Internet-related objectives, a methodology in two phases was followed. First, a quantitative methodology consisting of an open-link survey on CBSA's website was set up. It was followed by a series of online focus groups with CBSA's website visitors.

1.2.2.1 Open-link Survey on the CBSA Website

This quantitative research was conducted through an online survey, using a Computer Aided Web Interviewing (CAWI) technology. The public consultation was launched by means of an open-link survey questionnaire available on the CBSA website. Any individual who visited the traveller's section of the site between February 4, 2019 and March 4, 2019 was invited to answer the questionnaire by clicking on the link.

This part of the public consultation generated a significant volume of responses. A total of 2,729 respondents were gathered via the open-link. We should remind the reader that the results of this part of the public consultation should not be interpreted as representing the opinions or attitudes of the Canadian public at large nor representative of the visitors of CBSA's website. It is a collection of respondents who volunteered to answer the questionnaire. No statistical weighting was performed on this sample.

Since this is a sample of volunteers, no margin of error can be calculated for this portion of the study. Nor can we comment on the participation rate, as we do not know the traffic and the exact volume of visitors to the Agency's website during the period when the open link was active on the web page.

The online survey has given us the opportunity to recruit participants to conduct focus groups with users of the Agency's website. We therefore asked all survey participants if they were open

to participate in a second phase of the study. Those who agreed were invited to leave their names and contact information so that we could contact them to complete the recruitment process.

Leger adheres to the most stringent guidelines for quantitative research. The survey instrument was compliant with the Standards of Conduct of Government of Canada Public Opinion Research – Series E – Qualitative and Quantitative Research. The questionnaire was developed by Léger in collaboration with the CBSA research project leaders.

The details of the methodology and more information on Leger’s quality control mechanisms are presented in Appendix.

The survey questionnaire is available in Appendix.

1.2.2.2 Online Focus Group

Leger conducted a series of three (3) online focus groups with visitors of the CBSA Website. Their were all recruited from the online survey from the previous research phase of the study. All three sessions were held online via the ITracks video chat platform with participants from different regions of Canada or the US. The following table is a summary of the locations, date, profile and number of participants for all the discussion groups.

GROUP	Group profile	Language	Recruited	Participants	Dates and	Time (Eastern time)	Type
GR01	CBSA’s website visitors	FR	10	8	March 7, 2019	4:30 PM	Online
GR02	CBSA’s website visitors	EN	10	8	March 7, 2019	6:00 PM	Online
GR03	CBSA’s website visitors	EN	10	7	March 7, 2019	8:00 PM	Online

Participants were informed of all their rights under Canada’s *Privacy Act* and the Standards for the Conduct of Government of Canada Public Opinion Research. Specifically, their confidentiality was guaranteed, and their participation was voluntary. Léger was responsible for the recruitment of the participants and of the moderation of the online focus groups.

Léger's professional recruiters ensured the availability and participation of recruits. Léger was

responsible for organizing the sessions on Itracks' video chat platform. A financial incentive of \$100 per participant was given to all group participants to thank them for taking the time to participate.

1.3 Overview of the Intranet Study Findings

Given that 'Atlas' has created some frustration and that many employees have written it off as an effective work tool, we believe that the Intranet needs a full re-launch both to signal a significant change in direction and usability and a clear indication that the new tool was in large part "designed" by users. That full re-launch would require a new name. If brand equity in Atlas is low, change the brand. We suggest a name along the line of "MyBorder" to give it a relevant name and a clear indication that it is 'their' work tool, 'their' home.

In order to achieve this goal, we strongly recommend that the Atlas modernization team create a small number of working groups to co-design the new architecture. This will drive support for the initiative and improve usability. We readily see the need for a communication group (including the regions), a HQ group (finance, procurement and HR functions in particular), a BSO supervisor group (with representation for the regions).

Building engagement should be at the core of the new design. All employees expressed the need for a common "News Headlines" section that would represent what the Agency does and how it serves its mission. While not limited to frontline activities, the core of that section should be about protecting and serving Canadians at the border. Frontline staff want to hear more about themselves and HQ employees want to hear about the front line. Initiatives like Border Update (if captioned) can serve this purpose, but regional staff expressed the need to hear about news from all regions and share initiatives, successes, stories and kudos in a format that is more "bottom-up" rather than "top-down".

Atlas should be first conceived as a "work tool". It is there to support employees in carrying out their duties, tasks and responsibilities. What leads employees to Atlas today is task-based, not "let's see what's new or going on". Users will look for "softer" information only if they believe Atlas will allow them to get their job done.

The new design should aim for oversimplification. A design with fewer menus versus more levels should be considered. This will be tested in the tree testing validation stage.

The wiki in its current form may be harmful for the Agency. Participants in the research who use their regional wiki only go there for a very limited number of pages, while they have strong doubts about the quality, accuracy and validity of the information found in the wiki. The working groups should determine what are the key functions served by the wiki now and integrate this into, potentially, a collaboration zone within Atlas.

Moving towards Apollo as the document repository should continue. If some still resist the change because of a login process that is seen as not optimal and despite slowdowns and downtime, many employees feel a 'leaner' Atlas efficiently directing users to the relevant Apollo documents can work.

The proposed information architecture for Atlas could be as follows:

Homepage

Employee

- Awards and Recognition
- Employee Assistance Program
- Employee Orientation / Onboarding / New Hires
- Employment Equity and Diversity
- Integrity, Values and Ethics
- Jobs and Career Development
- Occupational Health and Safety
- Pay and Benefits
- Training and Learning
- Well-being
- Security

Tools

- Information Management
 - Apollo
 - ATIP
 - Forms and Template Library
 - Immigration
 - Commerce
 - Traveller
 - Enforcement of the Law
 - Other Themes
- Frontline Bulletins and National Document Centre Publications
 - Immigration
 - Commerce
 - Traveller
 - Enforcement of the Law
 - Other Themes
- Guides / Manuals and Standard Operating Procedures

- Immigration
- Commerce
- Traveller
- Enforcement of the Law
- Other Themes
- Policy Library
- Immigration
- Commerce
- Traveller
- Enforcement of the Law
- Other Themes
- Finance Volume
- Procurement and Contracting
- Accommodations and Facilities
- The Organization / About Us
 - Agency Organization Chart / About Branches, Directorates and Divisions
 - Executive Offices
- Human Resources
 - Labour Relations
 - Performance Management
 - Staffing
- IT Portal
 - Helpdesk
 - IT Portal
 - ACROSS
 - ICES
 - CAS
 - ESS
- Daily News
 - Agency and Branch Initiatives Priorities
 - Border Updates (Video Series)
 - CBSA Gives / GCWCC (Charitable Campaign)
 - Event Calendar
 - Messages from Executives
 - News and Photo Galleries

There are some important lessons learned in developing the final information architecture for the renewal of Atlas:

1. The "Frontline Bulletins and National Document Centre Publications" should be classified under the main menu "Tools" and not under the menu "Daily News".
2. Some items, as currently identified in Atlas, should be renamed to clarify their content.
 - a. The "Employment and Professional Development" tab can easily be confused with the "Training and Learning" tab.

- b. The tabs "Agency Organization Chart / About Branches, Directorates and Divisions" and "Executive Offices" do not adequately allow users to know what content they will find under either one.
 - c. The information found under the "Human Resources" tab should be reformulated. For the moment, some of the information found under "Human Resources" is also searched under the "Employee" menu. Work should be done at this level to clarify and reorganize that information.
 - d. Identify more clearly where to find the content of the weekly video series in the "Daily News" tab to make it easier for users to find it.
3. The results of the tree test indicate that the main menu created by employees during card sorting works properly to guide users in their task on the intranet.
 4. The accuracy of libraries of forms, guides, manuals, manuals, policies and newsletters on different topics, such as immigration, commerce, travel, etc., helps users to guide and refine their search for information. In a real work environment, we believe this approach is promising.
 5. The tree test does not pretend to have evaluated all categories and items of the submenus. The effort to clarify category wordings must be systematically carried out by the CBSA for every item.

1.4 Overview of the Internet Study Findings

When it comes to the Internet research with travellers, both the quantitative and qualitative research phases confirmed that visitors tend to be satisfied. Indeed, they “got what they were looking for”. Beyond the usual critique concerning the look & feel of government-type websites, and the feeling that pages were “too wordy” or “too busy”, most participants were able to get the answers they needed. Some processes were more laborious, however. It is namely the case of those seeking to fill out a Nexus application for the first time. For them, the process is not seamless and fully transparent and could be reviewed. The language of the menus makes them sound like “action items” or “transactional items” while they are not and many were surprised to be taken out of the GoC environment later in the process.

Other changes were suggested by participants. First, menus should be changed from the current language to simple questions (i.e. How to apply for Nexus? What can I bring back to Canada?). Participants feel they access the website to answer a question they have and that if the website mirrored these questions, it would provide for a smoother navigation. They feel that the current language can be ambiguous or make some of the menu items not mutually exclusive.

Second, participants believe CBSA could improve the transparency and clarity of the Nexus pages (e.g. forms cannot be filled in the GoC environment, redirection to a US government site is “normal”). The current funnel leaves the impression for many first-timers that they will apply and complete the process right there.

Third, many participants felt they had not noticed the top blue menu items and went to the menus at the bottom of the home page or Nexus page. They felt the blue bar at the top blends into the CBSA logo making the menu difficult to spot

And finally, those coming to renew Nexus (yet did not know the address of the US Government site) felt they should have an obvious bottom they could click on a get re-directed right away. They struggled to find their way on the CBSA website and find the needed link. Some said they left CBSA, back to Google to make a different query.

1.5 Statement of Limitations

Qualitative research provides insight into the opinions of a population or a group, rather than providing a measure in percent of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as directional only.

1.6 Notes on Interpretation of Research Findings

The views and observations expressed in this document do not reflect those of Canada Border Services Agency. This report was compiled by Leger based on the research conducted specifically for this project.

1.7 Political Neutrality Statement and Contact Information

I hereby certify as Senior Officer of Leger that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the [Policy on Communications and Federal Identity](#) and the [Directive on the Management of Communications- Appendix C](#) (Appendix C: Mandatory Procedures for Public Opinion Research).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed:



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