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Canada Child Benefit Program: Satisfaction Survey

Executive Summary

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March 2020

This public opinion research report presents the results of a telephone survey conducted by The Strategic Counsel on behalf of Canada Revenue Agency. The research study was conducted with 1,150 Canada Child Benefit recipients between February 19 and March 6, 2020.

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I. Executive Summary

Executive Summary

A. Background and Objectives

Since 2000, the Canada Revenue Agency (CRA) has been continuously conducting studies to gauge client awareness and satisfaction with the Canada Child Benefit (CCB). The CCB is a tax-free monthly payment made to eligible families to help them with the cost of raising a child under 18 years of age.

The CRA continues to recognize the value in collecting recipients' feedback, in order to provide the Benefit Programs Directorate (BPD) team with useful data. The main objectives of the survey are two-fold: to gauge satisfaction with the overall and various stages/components of the CCB experience and to evaluate specific aspects of the delivery of the program.

B. Methodology

In past years, the CRA has undertaken surveys on the Canada Child Benefit using both online and telephone methodologies. Given the availability of telephone numbers for recipients and the track record of response rates, telephone methodology remained the most appropriate and efficient way of obtaining feedback from recipients.

The CRA provided The Strategic Counsel with a list of 31,875 CCB recipients. The list was separated into two contact lists based on the length of time the recipient had been receiving payments. The first included 15,375 first-time recipients and the second 16,500 long-time recipients. Each list included contact information such as the recipient's name, phone number(s), key demographic variables, and regional information (such as postal code, province).

The Strategic Counsel completed surveys with a total of 1,150 recipients across Canada (500 first-time recipients and 650 long-time recipients). In accordance with the original sample provided, soft quotas were established to ensure the final sample closely aligned to regional proportions reflected in the list provided by CRA. Otherwise, no additional quotas were set.

Further details on the methodology can be found in Section III of this report. The response rate calculation, and the English and French surveys are included in the Appendix (Section V).

C. Key Findings

Survey questions were crafted to gauge the experience and satisfaction of first-time and long-time CCB recipients across a range of service attributes and platforms (i.e., telephone, online, mail, etc.).

The structure of the survey was designed to assess the overall satisfaction of these recipients in respect of their interactions with CRA regarding the CCB, as well as the payment process and notifications. In addition, respondents were queried about the most recent contact with the CRA and asked to evaluate the experience. The analysis of these findings considers how the experience differs across service platforms and highlights some areas for improvement.

A short series of questions specifically probed views of the Child Custody Arrangement Questionnaire, among those recipients who recall receiving it. Finally, recipients offered some additional insights in terms of their preferred method of application for CCB if they were to apply for the Benefit again for another child, as well as their awareness of specific CCB protocols related to managing their online profile and the requirement to file tax returns yearly in order to maintain their CCB payments.

1. Satisfaction with CCB Services: Overall and on Specific Service Attributes and Processes

In general, CRA receives fairly high ratings of satisfaction on CCB services, both overall, and across specific service areas, processes and attributes. The table below summarizes the 'net' satisfaction scores in all areas for which this was measured, showing both the total (all recipients) and the break-out for first-time and long-time recipients. 'Net' satisfaction includes the combined percentage of respondents who gave a rating of 'very' or 'somewhat satisfied' on the measure being assessed. Note that the specific service area or attribute being rated may not apply to all respondents. In some cases, only those who had contacted the CRA about CCB services in the last 12 months were asked to assess their satisfaction on attributes including how quickly their issue was resolved, or the accuracy of the response they received. Similarly, only those who had contacted the CRA by telephone, regarding CCB services, rated their level of satisfaction with aspects of the interaction between themselves and the CRA agent.

The overall satisfaction rating, taking into account various interactions the recipient may have had with the CRA regarding the CCB, is very strong – almost nine-in-ten (87%). Fully half (50%) of recipients offered the highest rating of 'very satisfied.' The results on this measure are also fairly consistent for both first-time and long-time recipients suggesting that CRA offers a high level and quality of service for CCB recipients whether they are more recent applicants or have been receiving the benefit for a period of time.

There is, however, a fairly wide spread in satisfaction ratings across the key service attributes and processes which were assessed as part of this study. Ratings varied by 16-points with the highest being for the professionalism shown by the CRA agent (90%) – asked only of those who had specifically contacted CRA by telephone – and the lowest rating associated with how quickly an issue was resolved (74%) – asked only among recipients who had contacted CRA about CCB services in the last 12 months. The only other areas which received satisfaction ratings below the threshold of 80 percent (which is often set as the goal for many client or customer satisfaction programs) were the way that CRA agents resolved the issue (77%) and the accuracy of CCB notices (79%).

For the most part, satisfaction ratings varied only minimally between first-time and long-time recipients. However, in three specific areas, satisfaction ratings of long-time recipients were somewhat lower as compared to the ratings offered by first-time recipients:

- **How quickly the issue was resolved** (9-points lower among long-time recipients (68%) vs. first-time recipients (77%));
- **Professionalism shown by the CRA agent** (8-points lower among long-time recipients (84%) vs. first-time recipients (92%)); and
- **Accuracy of information on CCB notices** (6-points lower among long-time recipients (76%) vs. first-time recipients (82%)).

NET SATISFACTION WITH CCB SERVICES AND KEY SERVICE ATTRIBUTES (base sizes vary)

	TOTAL	First-time recipients	Long-time recipients
	%	%	%
Professionalism shown by the CRA agent*	90	92	84
Satisfaction with the overall experience, across all interactions with CRA regarding the CCB	87	87	87
Time it took to receive first CCB payment	85	85	N/A
Safeguards in place to protect personal and business information**	85	87	82
Ease of understanding information on last CCB notice	80	79	81
Accuracy of response of the response received**	80	80	79
Accuracy of information on CCB notices	79	82	76
Way that CRA agent resolved the issue*	77	78	77
How quickly issue was resolved**	74	77	68

*Asked of a sub-set of respondents – those who contacted CRA by telephone

**Asked of a sub-set of respondents – those who have contacted CRA about CCB services in the last 12 months

2. Contact with CRA Regarding CCB Services: Method and Reason for Contact

A relatively small percentage of those surveyed (19%) contacted CRA in regards to CCB services over the past 12 months. First-time recipients (30%) were much more likely to have contacted CRA compared to long-time recipients (11%).

The main issues or activities causing recipients to interact with CRA are to update their profile (49%), deal with their application in some way (27%) and issuance of payment (20%). Very few of the interactions were with respect to a service complaint (5%) and this is borne out in the fairly positive satisfaction ratings that CRA receives across the board with respect to CCB services and processes.

As noted in the table above, satisfaction ratings for those who had contacted CRA about CCB services were reasonably good with respect to perceptions of the privacy safeguards that have been put in place (85% are 'satisfied') and the accuracy of the response they received (80% are 'satisfied'). The one area that could be improved upon is the timeliness of issue resolution (74% 'satisfied').

Telephone is the primary method of contact (78%), followed by the use of CRA's online service platforms (23%). Very few contacted CRA by mail (11%). Recipients found accessing CCB services to be relatively easy overall (65%), although perceptions of ease of access was variable across service platforms: higher among those accessing CCB services online (78%) compared to those accessing services by telephone (60%).

Recipients' interactions with CRA agents by telephone are positive, based on satisfaction ratings, although as noted earlier, there may be some opportunities to review how agents resolve issues in order to boost the satisfaction rating on this particular metric. Ratings of online services are also fairly positive – three-quarters offer high marks (ratings of 'good/very good') in terms of the helpfulness, ease of understanding, accessibility and completeness of the information on CRA's online services.

3. Awareness of CCB Online Services

As noted, many recipients are interacting with CRA in order to update their profile, albeit most continue to utilize telephone over online. While awareness of the ability to update personal information for benefit and credit purposes online is fairly high (78%), awareness is lower with respect to understanding that recipients can also pay outstanding CCB balances online (60%) or that they can use the MyBenefits CRA web-based app to get a quick view of their benefit and credit details along with their eligibility information (54%). There are clear opportunities not only to redirect a larger proportion of recipients from telephone to the online platform, but also to raise awareness of the

various services and features offered online. Results suggest that for those recipients who have accessed the information on CRA's online services, the experience is generally a good one.

4. Awareness of the Need to File a Tax Return

The vast majority of recipients (88%) were aware of the need to file a tax return in order to continue receiving CCB benefits, although this was somewhat higher among long-time recipients (92%) compared to first-time recipients (84%). Although relatively few were not aware of this requirement (12%), this was higher among single-parent households (21%), younger recipients, aged 18 to 34 (16%), and those with high school education (16%). These findings are notable given that these groups are often found in higher proportions among the most financially insecure and for whom ongoing receipt of the CCB is particularly critical to their ability to care for their family.

5. Applying for CCB in the Future

Interestingly, about half (49%) of recipients indicated that, in future, if they were to apply for the CCB for another child, they would do so online, using the secure portal 'My Account.' First-time applicants (57%) are much more likely to cite this as their preferred method over registering at the hospital (29%). This finding could indicate that there is some momentum among the more recent cohort of applicants, and thus possibly those who will be applying in the near future, to make better use of CRA's online platform when accessing CCB services. Again, this underscores the value in continuing to raise awareness of the array of CCB services and information online and the ease of use of this platform both for registration as well as ongoing management of the recipient's profile and account.

Hospitals are a preferred source by about one-third (35%) of recipients, were they to apply again for the CCB for another child, although preference for this method is higher among long-time recipients (40%) compared to first-time recipients (29%). This finding is perhaps not that surprising given that hospitals and/or birthing centre staff are a common referral source (31%) and particularly for long-time recipients (38% vs. 22% among first-time recipients).

6. Evaluation of the Child Custody Questionnaire

The CRA may, from time to time, send a questionnaire to CCB recipients requesting that they confirm or correct the information with regards to child custody arrangements. When asked if they had received this questionnaire in the last 12 months, very few (6%, n=67) recipients said they had. Those who indicated they are divorced/separated or widowed (16%) and men (13%) were more likely to be among the group who had received the questionnaire.

While the base of those who had responded in the affirmative to this question is quite small, most (58%) said it was either 'somewhat' or 'very easy' to fill out. Over one-third (39%) did indicate having some difficulty, and this suggests that more work should be done to review the questionnaire with a view to simplifying the instrument, improving comprehension and clarity, or the process of completing it.

D. Conclusions

On the whole, the results are fairly positive and generally confirm that, among first-time and long-time recipients, many are satisfied with the information and processes related to obtaining information about and maintaining their CCB, as well as interacting with the CRA in regards to the CCB.

There are, however, a number of areas that CRA should examine further with the aim of better understanding recipients' needs or concerns, improving awareness, processes and efficiencies as well as the experience of CCB clients interacting with CRA on CCB-related issues:

- While recipients primarily access CCB services by telephone, there are **opportunities to continue to shift clients to the online platform**, especially given that the latter is viewed as easier to access relative to the former. Raising awareness among first-time applicants, but also among long-time recipients of the full range of features available online should be a priority. This aligns with clients' general preference for applying online. Presumably, once online they will begin to make use of the other features available on My Account and the My Benefits app. Moreover, awareness of the My Benefits CRA web-based app could be higher, so a particular marketing effort highlighting this app would be useful. The survey did not assess clients' media consumption patterns. But large proportions did indicate that they first heard about the CCB via friends or family members. A marketing strategy which is heavily focused on social media (i.e., Facebook, Twitter, etc.) could leverage and amplify 'word-of-mouth' referrals to the online platform.
- At the same time, the survey underscores that contact with the CRA about CCB services is predominantly undertaken over the phone. Thus, **continuing to improve telephone service is critical**. In this regard, more work needs to be done to determine what would help to make interactions by phone easier, as well as what clients' expectations are in terms of how quickly issues should be resolved.
- **Additional awareness-raising efforts regarding the need to file a yearly tax return** in order to continue receiving CCB benefits should be **highly targeted to key demographics** – single parent households and younger CCB recipients. While most are aware of this requirement, these particular groups are more vulnerable with respect to their financial security. It is worth noting that lone-parent families in Canada have been increasing in the last few years and that their household income tends to be among the lowest, certainly much lower than dual-earner couple families and lower as compared to single-earner male couple families.¹
- While relatively few respondents to the survey had received a questionnaire to confirm or update information on child custody arrangements, over one-third of those who did experienced some difficulty completing it. Given this, **the child custody arrangement questionnaire should be reviewed** in terms of overall ease of completion, specifically looking for ways to make it less onerous for CCB recipients.

¹ Single-earner and dual-earner census families by number of children
<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1110002801>.

MORE INFORMATION

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Signed:


