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Canadian Views on CBSA and Border Management

Findings from 2020 General Population Survey and Focus Groups Executive Summary

Prepared for the Canada Border Services Agency (CBSA)

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January 2021

This public opinion research report presents the results of a quantitative telephone survey conducted with 2,000 adult Canadians in March 2020; a quantitative survey which was conducted among 96 industry and business stakeholders via an open-link survey that was live between March and November 2020; and a series of 10 focus groups conducted by Ipsos Public Affairs on behalf of the Canada Border Services Agency. The focus groups were conducted with 85 adult Canadians in October and November 2020.

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A handwritten signature in black ink, appearing to read "M. Colledge", with a stylized flourish at the end.

Mike Colledge

President

Ipsos Public Affairs

1 Executive Summary

1.1 Introduction and Background

The Canada Border Services Agency (CBSA) has a mandate to provide integrated border services that support national security and public safety priorities, while facilitating the free flow of legitimate trade and travel. By doing so, the CBSA is an integral part of Canada's Public Safety Portfolio by protecting Canadians and maintaining a peaceful and safe society.

Over the last few years, the CBSA has faced and addressed new challenges in implementing its mandate. This includes effectively managing a surge in asylum claimants at numerous points across the country over the course of the past few years and implementing new technologies for the important work that the organization conducts for Canadians. Further highlighting the CBSA's role as a front-line agency that safeguards the safety and security of Canadians, the agency has also recently had to implement measures to protect against the global spread of COVID-19.

As part of the Federal Government's Blueprint 2020, the CBSA has been proactive in implementing new programs and initiatives to transform the organization and prepare for the future. For example, as part of this endeavor, the CBSA improved services to air travellers by introducing Primary Inspection Kiosks (PIKs) at six major airports. The organization continues to strengthen its commitment to healthy workspaces through a wide variety of wellness initiatives, and the CBSA is transforming the border experience by implementing the CanBorder – eDeclaration program.

In order to continue to fulfil its mandate to Canadians and prepare the organization for future challenges, it is essential for the CBSA to understand Canadians' knowledge, awareness, perceptions, and behaviours related to both the CBSA itself and the border crossing experience. Furthermore, information about Canadians' attitudes towards the possibility of a friend or relative pursuing a career with the CBSA will shed light on how the agency is perceived and will help direct recruitment efforts.

Additionally, the CBSA would like to explore the attitudes, opinions, and experiences of business stakeholders during their regular interactions with the Agency and focus on topics associated with innovation and economy. As the timing of the survey also corresponded with the COVID-19 pandemic in Canada, questions related to how the pandemic has affected cross-border trade were also added.

The CBSA has previously carried out public opinion and client satisfaction surveys in 2007 and 2017. This report will detail new research conducted in 2020 that will update previous research conducted by measuring changes in client satisfaction and public opinion towards the CBSA and border-related topics, while investing a number of new topic areas that are included in the 2020 survey.

1.2 Research Objectives

Information gained through this survey will be used by the CBSA to assess progress in meeting organizational objectives and to better evaluate Canadians' understanding of the CBSA and the border. Specifically, the objectives of the 2020 tracking survey are to:

- Obtain current information on the knowledge, awareness, perceptions and behaviours of Canadians related to the CBSA and the border; how Canadians recognize the CBSA and perceive the Agency and its services.
- Identify gaps in knowledge and awareness of the Agency's programs and services within the traveller and commercial populations.
- Evaluate how Canadians who travel internationally perceive the effectiveness of communications and its impact on their behaviours (information sources, messaging of information intended for international travellers coming/returning to Canada).
- Evaluate how non-travellers perceive other issues such as detentions/removals, information sharing, privacy and other trending issues.
- Determine where threats to Canada are perceived to be coming from and the general confidence that Canadians have towards the CBSA in protecting Canada and Canadians.
- Determine how the Canadian public informs themselves of their obligations and responsibilities when crossing the border, their preferences on how they interact with the Agency and their level of satisfaction with services received.
- Identify where Canadians access information relevant to the border (travel and importing) and CBSA operations.
- Generate information that would help the CBSA better understand the actual concerns, barriers and opportunities perceived by Canadians on key issues (i.e. border wait times, security, access to services).
- Assess sentiment towards recruitment and level of support towards those who work or would work for the CBSA.
- Obtain sufficient demographic and psychographic information to develop key audience profiles of groups most likely to be engaged in CBSA issues.

In addition to the general population survey, the CBSA also carried out an online industry and business stakeholder survey. The stakeholder survey explored the attitudes, opinions, and experiences of CBSA's business stakeholders, with particular emphasis on topics associated with innovation and economy, such as:

- Understanding of documentation requirements for the transport of restricted goods
- Interactions with the CBSA when asking a question related to their business
- Satisfaction with the CBSA in resolving questions or problems related to their business
- Use of customs brokers
- Adaptation to accommodate e-commerce values
- Participation in and satisfaction with Trusted Trader programs
- Awareness of the statistics on administrative monetary penalties posted to the CBSA website
- Ease of finding information related to import/export of goods during COVID-19

Qualitative focus groups were also carried out among Canadian travellers who use land and/or air crossings to provide a deeper dive into attitudes and opinion concerns the CBSA and the border.

The following areas were asked about in the March 2020 survey and viewed as opportunities to gain deeper insight via qualitative research:

- Obtain current information on the knowledge, awareness, perceptions and behaviours of Canadians related to the CBSA and the border; how Canadians recognize the CBSA and perceive the Agency and its services.
- Identify gaps in knowledge and awareness of the Agency's programs and services within the traveller and commercial populations.
- Identify where and how Canadians access information relevant to the border (travel and importing) and CBSA operations.
- Assess sentiment towards recruitment and level of support towards those who work or would work for the CBSA.
- Discuss information sharing and privacy (what are they comfortable with (say, in exchange for quicker passage/" trusted traveller" status?) and where do they draw the line? How can trust be gained/maintained?).
- Areas not included in the initial survey and that could be beneficial in informing current policy activity:
 - What do Canadians most recently recall hearing about the CBSA (be it in the news or via social media)?
 - What are Canadians impressions about the CBSA and border management from the onset of COVID- 19 to now?
 - Where do Canadians access information related to COVID-19 and travel?
 - Which sources do they trust and consider credible?
 - What do they need to know to be reassured and resume travelling?
 - Gauge intention to travel after the pandemic and expectations/concerns.
 - What do participants think that will look like?
 - What are their worries, thoughts etc. (delays, processes, what do they expect from us?)
 - Participants could view our videos explaining COVID-related changes to air and land entry and then be asked how they feel about the changes and their ability to facilitate safe travel and protect communities form further spread.

1.3 Methodology

To accomplish the research objectives mentioned above, the public opinion was carried out in three phases:

- Phase 1: **Telephone survey** among general population
- Phase 2: **Online survey** among business, industry, and stakeholders
- Phase 3: **Focus groups** among members of the general population

Phase 1 was carried-out among the general population of Canadian adults (18+) by telephone from March 5-29, 2020. A total of 2,000 interviews were completed. Respondents were recruited by telephone using dual-frame random digit dialing (RDD) methodology. In total, 1,300 interviews were carried-out on cell phones (65%), while the remaining 700 interviews were carried-out on

landline phones. This dual-frame telephone approach is designed to produce a highly representative sample of respondents and considers the increasing number of Canadian households that either do not have a landline or have a landline, but use their cell phone as their primary telephone line. The average telephone interview duration was 14 minutes.

Quotas and weighting were employed to ensure that the sample reflects the adult population as determined by the latest census taken in 2016. The data has been weighted by age, gender, and region. Please see Section 4 for more details.

The overall findings of the research are considered to be accurate to within ± 2.5 percentage points (19 times out of 20), of what the results would have been had all Canadian adults been surveyed. This interval will be wider among subsets of the population. Furthermore, all sample surveys may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

Where appropriate, data in this 2020 wave has been tracked to a baseline study carried out in 2017. Data from a similar study in 2007 has also been included where possible. In some cases, changes to answer options will affect the direct comparability of findings and these instances are noted in the report. However, comparisons can still be made with regard to the overall trends observed in each wave.

▲▼ Symbols have been used to indicate where the current wave's results are statistically significant compared to the baseline study.

Phase 2 of the research was carried out by means of an online survey among commercial stakeholders involved in the import/export industry in some way. The link to the survey was distributed via email by the CBSA to members of the Border Commercial Consultative Committees (BCCCs) (21 members) and those receiving the survey link were encouraged to share the survey with their own membership lists. The Agency also promoted and sent reminders to encourage participation. The survey was live from March 13 to November 2, 2020. The COVID-19 pandemic emerged in Canada during this time, and could have impacted the survey participation rate. A total of 96 businesses completed the survey. For firmographic information on the sample and the contents of the survey, please see the Appendix.

As a result of the small sample size, weighting was not applied to this sample and should not be taken as being representative of the target population. Due to the small sample size, further made smaller by certain questions only being asked to specific types of businesses or business who have/have not undertaken a certain action, sub-group analysis was not carried out and all questions are reported in the aggregate.

Phase 3 was conducted by Ipsos on behalf of the CBSA, as follows:

- 1 Winnipeg online focus group and 1 Regina/Saskatchewan online focus group conducted on October 20, 2020
- 2 New Brunswick online focus groups conducted on October 21, 2020
- 1 Vancouver online focus group conducted on October 22, 2020
- 1 Calgary online focus group conducted on October 26, 2020
- 2 Montreal online focus groups conducted on October 28, 2020 in French
- 1 Toronto/GTA online focus group and 1 Windsor online focus group conducted on November 2, 2020
- Participants in all groups were a mix of frequent land and air crossing travellers prior to

COVID-19 (before March 2020).

1.3.1 Table 1: Focus Groups Sample Profile

Variable	Number of participants
Location	
Winnipeg, MB	9
Regina, SK	8
New Brunswick 1	7
New Brunswick 2	9
Vancouver, BC	9
Calgary, AB	7
Toronto, ON	8
Windsor, ON	8
Montreal, QC 1 (French)	10
Montreal, QC 2 (French)	10
Area	
Urban	57
Suburban	22
Rural	6
Age	
34 years and younger	33
35-44 years old	20
45-54 years old	19
55 years old or older	13
Household income	
Under \$20,000	2
\$20K to \$40K	8
\$40K to \$60K	8
\$60K to \$80K	15
\$80K to \$100K	24
\$100K to \$150K	19
\$150K or more	7
Refused	2
Language	
English-speakers	65
French-speakers	20
Segment	
Land Crosser	38
Air Crosser	45
Both	2
Type of Travel	
Business	7
Personal	59
Both	19

1.4 Notes to Readers

1.4.1 Interpretation of Qualitative Findings

The findings presented for **Phase 3** of this report are qualitative in nature. The value of qualitative research is that it allows for the in-depth exploration of factors that shape public attitudes and behaviours on certain issues. When interpreting the findings, it should be kept in mind that at no point is the intention to produce results that are statistically representative of the population at large. Separate quantitative surveys were conducted (Phases 1 and 2) and the report from those surveys should be consulted for a representative picture of attitudes and perceptions around border services.

The following chapters present the key themes – notably the findings were consistent across the different demographic groups and locations. The few notable sub-group differences have been called out where relevant. Quotes have been used throughout the report to illustrate key points in the voice of participants.

1.5 Contract Value of the Public Opinion Research

The contract value for this Public Opinion Research study is \$174,443.41,

2 Key Findings

2.1 Quantitative Research

Awareness of and Experience with the CBSA

- Many Canadians are mobile and travelling abroad – **two-thirds say they have travelled to another country in the past two years**. On average, Canadians who have travelled abroad in the past two years have taken an average of 5 trips during this time period.
- As a result of these travelling behaviours, many Canadians have experience with the CBSA, usually at the nation's airports upon their return to Canada. In fact, **three-quarters say their last trip abroad was by air**.
- **Slightly more than half (57%) of Canadians are aware of the CBSA in some way**, with about one quarter able to give the agency's correct name on an unaided and open-ended basis when asked.
- Canadians typically come into contact with the CBSA in one of two ways, either through direct contact with a CBSA officer or through a primary information kiosk (PIK) at an international airport. Those who have had contact with a CBSA officer are also pleased with the service they received; **over 9 in 10 say they had a positive experience with the CBSA officer** and almost all said they were served in the official language of their choice.
- Of those who were searched and/or taken aside for further questioning, **9 in 10 say they believed that this was done in a respectful manner**.
- Overall, **Canadians have a very positive impression of the PIKs**, rating them very highly on several attributes, such as communication, amount of time saved, and accessibility to individuals of all types.
- As such, perhaps it is not a surprise that Canadians view the CBSA in a favourable light. **Almost 9 in 10 say that they have a positive impression of the CBSA**.
- Further, 8 in 10 saying that they would be **supportive of a family member of close friend who chose to pursue a career with the CBSA**.

Managing the Canada-US Border

- **Over three-quarters of Canadians believe that Canada is either doing a better job or doing a similar job as the US on border management**. These opinions remain unchanged as compared to 2017.
- Compared to 2017, a **larger proportion of Canadians believe that the border is more secure** than 5 years ago (+6).
- This does not mean that Canadians are not concerned about border security. **Four in ten are concerned that something or someone could enter Canada and threaten the security and safety** of Canadians. Those worried about this issue cite terrorism, diseases, drugs, and weapons as their main concerns. However, **one in five Canadians mentioned specifically COVID-19 or coronavirus as their main border management concern**. This is not surprising, given the extraordinary circumstances that unfurled during fieldwork.
- Canadians also have confidence in the CBSA to successfully manage duties related to

managing the border. They are largely **confident in the CBSA's ability to protect the personal information it collects from travel documents and keeping cargo moving across the border**. Canadians are slightly less confident in the CBSA's ability to identify and stop human trafficking and manage the entry of irregular asylum seekers into Canada. It is worth noting that over half of Canadians continue to be confident in the agency's ability to carry out these tasks.

Business/Industry Stakeholders

- **Three-quarters (74%) of businesses surveyed say that the process of moving goods into Canada is efficient in some way.** Among exporters, carriers, and service providers, 83% report being confident in knowing what documentation is required to export regulated goods from Canada. However, almost **half (48%) of these same businesses say that the CBSA's reporting requirements are difficult to understand.**
- Almost all of businesses surveyed (94%) say that they have contacted the CBSA with a question or issue related to their business within the past two years. Of these, **nine in ten (90%) say they were either 'very satisfied' or 'somewhat satisfied' with the courtesy of the CBSA representative** they talked to. However, they were a little less satisfied with being the representative being able to answer their question (64%) or getting a prompt response (58%).
- **Three-quarters (76%) of businesses surveyed said that they have adapted to accommodate e-commerce volumes.** The remaining proportion may either have problems in meeting these volumes, or do not see it as particularly relevant to their business.
- Use of customs brokers is relatively widespread among those importing/exporting goods across the border. **Three-quarters (76%) of businesses surveyed use a customs broker at least 'sometimes' to help facilitate shipping their goods across the border.**
- **The most common reason for hiring a customs broker is to assist in customs clearance (85%).** However, customs brokers are also hired to carry out other functions such as tariff classification (46%), customs valuation (26%), international trade consulting (26%), freight management and consolidation (21%), regional/national warehousing (15%), and import/export purchase order management (10%).
- **Awareness of CBSA's Trusted Trader programs is very high among businesses surveyed.** Nearly all (94%) report being at least nominally aware of the existence of such programs. **Among those aware, two-thirds (66%) say they participate** in these programs.
- Businesses that participate in the Trusted Trader programs are on the whole satisfied with various aspects of their membership. In particular, **seven in ten (69%) of those surveyed who participate in these programs say they are satisfied** to some degree with the benefits of these programs relative to their cost.
- When asked whether their organization (and their customers) would be willing to provide additional advance information to the Government of Canada in order to make the border clearance process smoother, 79% say they are willing to do so.
- **Three-quarters (73%) of businesses surveyed say they were aware of the administrative monetary penalty statistics** on the CBSA website, and six in ten (60%) of those aware say that they were useful in helping their business comply with customs

requirements.

- In the case of communication system outages, **email notifications are by far the preferred method of being notified** (90%).
- Looking ahead, businesses surveyed mentioned issues with CBSA Assessment and Revenue Management (CARM) as one of the most pressing issues for the Agency to address (17%).

2.2 Qualitative Research

Focus Groups

- **Overall focus group participants had positive to neutral perceptions of CBSA** – the agency is seen as being effective in protecting Canada’s borders, particularly given the size of the border and the scope and scale of activities involved.
- **Awareness and perceptions of the CBSA are mostly being driven by interactions with border service officers, and service experiences at land and air crossings.** There was very little awareness of CBSA in the news, on social media, or in careers other than as border service officers.
 - **The key factors that drive perceptions** are the demeanour of border services officers, wait times, and past experiences having belongings or vehicles searched.
 - **Key areas for improvement** would be in reducing wait times, and providing greater consistency and more standardization across experiences with border services officers.
- **Trusted sources of information are the CBSA and federal government website** for information about border crossing, and this expands to established national and local news media outlets and journalists for information about COVID-19 travel – these are preferred both for their accuracy and credibility.
 - **Social media and other sources are considered less reliable**, and are used more as secondary sources. Use of supplementary research when using these sources is common.
- **Modernization via digital and online tools, and the use of data, was generally viewed favourably if it tangibly results in a more efficient process and shorter wait times.** As such, electronic inspection kiosks were mostly viewed favourably. However, comfort with providing more personal information was polarized between those who had no issues with this idea, and others who would need to find out more details in order to form an opinion, or were opposed to the idea in principle.
 - **CBSA’s website, the CanBorder app, the ArriveCAN app for COVID-19, and social media** were all viewed as useful tools that do or could facilitate easier and smoother travel, even if intent to use these was mixed.
- **In order to feel comfortable traveling again post COVID-19, this would need to involve a combination of factors:** a widely available and disseminated effective vaccine, and declarations by public health figures and government that it is safe to travel again.
- **There is much uncertainty and mixed views about what travel will look like post-COVID-19.** The CBSA’s role would be in providing credible information to the public, and planning to the degree possible for a surge in demand or general uncertainty and confusion

in airports and at land crossings when travel resumes.

- **The CBSA land and air crossing videos were effective in providing information and reassurance** about measures taking place, but could go further in terms of pulling apart the roles of various agencies, and reassuring the public about enforcement.