



Canada Revenue
Agency

Agence du revenu
du Canada

Canada Revenue Agency Call Centre Service Expectations

Final Report



Prepared for the Canada Revenue Agency

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Canada

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Final Report

Prepared for the Canada Revenue Agency by Kantar TNS

September 2018

The Canada Revenue Agency (CRA) commissioned Kantar TNS to conduct a public opinion research survey of Canadians' expectations when contacting a call centre. The aim of this research was to generate impartial data to provide the CRA with evidence to support the revision of service standards in order to meet taxpayers' expectations when dealing with the CRA's enquiries lines. A total of 804 Canadians, aged 18 or older, who called one of the CRA's enquiries lines between July 3rd and July 17th, were surveyed by telephone in August 2018. This publication reports on the findings of that public opinion research survey.

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1. Executive Summary

1.1. Research Purpose and Objectives

The aim of this research was to provide the Canada Revenue Agency (CRA) with evidence to support the revision of service standards in order to meet taxpayers' expectations when dealing with the CRA's enquiries lines.

1.2. Summary of Findings

Canadians that call a CRA enquiries line (hereinafter "Canadians") want to speak to an agent and they are willing to wait or phone back, even multiple times, to do so. Alternatives to speaking with a live agent are generally refused and this research suggests that by the time they have called an enquiries line, they have already attempted to use the alternative and thus believe their issue cannot be addressed in another way.

Virtually all Canadians would find it helpful knowing how long they would have to wait before speaking to an agent. On average, Canadians are willing to wait 12.5 minutes before hanging up and calling back at another time. Should Canadians find that the waiting time will exceed their maximum tolerable wait, they would mostly prefer an automated call back when an agent becomes available; however, some are willing to call back if instructed to do so in an automated message stating that all agents are busy. Few, however, are willing to attempt to complete the task in another way.

While some Canadians consider it unacceptable to receive a message indicating that all agents are currently busy helping other callers, only a few would be dissatisfied if they were required to call back. In addition to being willing to call back, many Canadians also indicate they could call again multiple times before becoming dissatisfied with the CRA's service. In addition, most Canadians say they could place a call at a different time if it would result in faster service at that time.

Generally speaking, when Canadians call an enquiries line, they want to speak to a live agent. Few are interested in using the automated phone service. They believe their issue is too complex and/or that the automated phone service cannot address their need.

When it comes to personal identification, Social Insurance Number (SIN) and a series of other questions is most preferred, followed by the creation of a Personal Identification Number (PIN). Voice authentication was of interest to only a small portion of the population.

Regarding publishing service commitments, Canadians prefer to know their chances of reaching an agent within an acceptable timeframe, expressed as a percentage.

1.2.1. Demographic Differences

Canadians aged 35 and above have a lower tolerance for waiting, calling back and using alternative options or an automated phone service. They are also more likely to be dissatisfied if requested to call back.

Canadians calling the Individual or Benefits enquiries lines are more likely to be dissatisfied about having to call back at a later time, while Business enquiries callers are more tolerant. Business enquiries callers are, however, quite insistent on speaking to an agent. Callers to the Business enquiries line are more likely than other callers to believe the automated phone system cannot answer their questions and that their issues are either too complex or need multiple answers, thus requiring them to speak with an agent. It is, therefore, not surprising that Business enquiries callers are – as compared to Individual or Benefits enquiries callers – more likely to want to see the CRA publish a service standard which indicates the average number of calls required before reaching an agent.

1.3. Methodology

A total of 804 telephone surveys were conducted with four target audiences: individuals (those who call the Individual enquiries line), benefit recipients, businesses, and tax intermediaries. Interviews were conducted using randomly selected telephone numbers of taxpayers who had recently called one of three dedicated CRA enquiries lines (Individual, Business, and Benefits enquiries lines).

A pre-test consisting of 13 English interviews and 10 French interviews was completed on July 26th, 2018. Minor changes were made before fully launching the survey on July 30th.

The survey was conducted from July 30th to August 9th, 2018. The findings can be extrapolated to Canadians who called the CRA enquiries line from July 3rd to July 17th with a margin of error of +/-3 per cent, 19 times out of 20.

1.4. Contract Value

The total contract value for this project was **\$54,910.03** (including HST).

1.5. Statement of Political Neutrality

I hereby certify as Senior Research Director & Public Sector Practice Lead of Kantar TNS that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences and standings with the electorate or ratings of the performance of a political party or its leaders.

A handwritten signature in black ink, appearing to read 'T. Whitehead', with a stylized, cursive script.

Tanya Whitehead
Kantar TNS
Senior Director & Public Sector Practice Lead



2. Sommaire exécutif

2.1. But et objectifs de la recherche

L'objectif de cette recherche était de fournir à l'Agence du revenu du Canada (ci-après appelée « l'Agence ») des éléments de preuve à l'appui de la révision de ses normes de service afin de répondre aux attentes des contribuables lorsqu'ils appellent les lignes de demandes de renseignements de l'Agence.

2.2. Résumé des constatations

Les Canadiens qui appellent une ligne de demandes de renseignements de l'Agence (ci-après appelés les « Canadiens ») souhaitent parler à un agent et sont prêts à attendre ou à rappeler, même plusieurs fois, pour parler à un agent. Ces personnes refusent généralement les autres options qui leur sont offertes, car elles ont déjà épuisé ces solutions lorsqu'elles appellent une ligne de demandes de renseignements et elles croient que leur problème ne peut être réglé qu'en parlant directement à un agent.

Pratiquement tous les Canadiens jugent utile de connaître le temps d'attente avant de pouvoir parler à un agent. En moyenne, les Canadiens sont prêts à attendre 12,5 minutes avant de raccrocher et de rappeler à un autre moment. Si les Canadiens jugent que le temps d'attente dépasse le délai d'attente maximal qu'ils sont prêts à accepter, ils préféreront généralement recevoir un retour d'appel automatisé lorsqu'un agent se libérera. Cependant, certains Canadiens sont disposés à rappeler si on leur demande de le faire dans un message automatisé indiquant que tous les agents sont occupés. Peu de Canadiens sont toutefois prêts à essayer d'accomplir la tâche d'une autre façon.

Même si certains Canadiens estiment qu'il est inacceptable de recevoir un message indiquant que tous les agents sont actuellement occupés à aider d'autres appelants, seuls quelques-uns d'entre eux seraient mécontents s'ils devaient rappeler. En plus d'être prêts à rappeler, de nombreux Canadiens indiquent également qu'ils pourraient rappeler plusieurs fois avant d'être insatisfaits du service de l'Agence. De plus, la plupart des Canadiens disent qu'ils pourraient appeler à un autre moment si cela leur permettait d'obtenir un service plus rapide.

De façon générale, lorsque les Canadiens appellent une ligne de demandes de renseignements, ils veulent parler directement à un agent. Peu d'entre eux souhaitent utiliser le service téléphonique automatisé. Ils croient que leur problème ou leur question est trop complexe et que le service téléphonique automatisé ne pourra répondre à leur besoin.

Les Canadiens préfèrent surtout donner leur numéro d'assurance sociale et répondre à une série de questions pour confirmer leur identité, et la création d'un numéro d'identification personnel (NIP) est la deuxième méthode qu'ils préfèrent. Seule une petite partie de la population présentait un intérêt pour l'authentification vocale.

En ce qui concerne la publication des engagements pris à l'égard des services, les Canadiens préfèrent connaître le pourcentage de chances qu'ils parlent à un agent dans un délai acceptable.

2.2.1. Différences entre les groupes démographiques

Les Canadiens âgés de 35 ans et plus sont peu tolérants à l'égard de l'attente, des rappels et de l'utilisation d'autres options ou d'un service téléphonique automatisé. Ils sont également plus susceptibles d'être mécontents s'ils doivent rappeler.

Les Canadiens qui appellent la ligne de demandes de renseignements des particuliers ou des bénéficiaires de prestations sont plus susceptibles d'être mécontents de devoir rappeler plus tard, tandis que ceux qui appellent la ligne de demandes de renseignements des entreprises sont plus tolérants. Toutefois, les Canadiens qui appellent la ligne de demandes de renseignements des entreprises insistent beaucoup pour parler à un agent. Ceux-ci sont également plus susceptibles de croire que le système téléphonique automatisé ne peut pas répondre à leurs questions et que leurs problèmes sont trop complexes ou nécessitent des réponses multiples, ce qui les oblige à parler à un agent. Il n'est donc pas surprenant de constater que les Canadiens qui appellent la ligne de demandes de renseignements des entreprises sont plus susceptibles que ceux qui appellent la ligne de demandes de renseignements des particuliers ou des bénéficiaires de prestations de vouloir que l'Agence publie une norme de service indiquant le nombre moyen d'appels que doivent faire les contribuables avant de pouvoir parler à un agent.

2.3. Méthodologie

Au total, 804 sondages téléphoniques ont été menés auprès de quatre publics cibles : les particuliers (ceux qui appellent la ligne de demandes de renseignements des particuliers), les bénéficiaires de prestations, les entreprises et les intermédiaires fiscaux. Ces sondages ont été menés en utilisant des numéros de téléphone choisis au hasard parmi les numéros des contribuables qui avaient récemment appelé l'une des trois lignes téléphoniques de l'Agence réservées aux demandes de renseignements (soit les lignes de demandes de renseignements des particuliers, des entreprises et des bénéficiaires de prestations).

Un essai préliminaire comprenant 13 entrevues en anglais et 10 entrevues en français a été effectué le 26 juillet 2018. Des modifications mineures ont été apportées au sondage avant son lancement complet le 30 juillet.

Le sondage a été réalisé du 30 juillet au 9 août 2018. Les constatations peuvent être extrapolées aux Canadiens qui ont appelé l'une des lignes de demandes de renseignements de l'Agence entre les 3 et 17 juillet avec une marge d'erreur de +/- 3 %, 19 fois sur 20.

2.4. Valeur du contrat

La valeur totale du contrat pour ce projet était de **54 910,03 \$** (taxe de vente harmonisée comprise).

2.5. Énoncé de neutralité politique

J'atteste, par les présentes, à titre de directrice principale de la recherche et chargée des pratiques dans le secteur public de Kantar TNS, que les produits finaux sont pleinement conformes aux exigences de neutralité politique du gouvernement du Canada établies dans la Politique sur les communications et l'image de marque du gouvernement du Canada et dans les Procédures de planification et d'attribution de marchés de services de recherche sur l'opinion publique. En particulier, les produits finaux ne contiennent pas de renseignements sur les intentions de vote électoral, les préférences quant aux partis politiques, les positions des partis ou l'évaluation du rendement d'un parti politique ou de ses dirigeants.



Tanya Whitehead

Kantar TNS

Directrice principale de la recherche et chargée des pratiques dans le secteur public



3. Foreword

3.1. Background and Objectives

The CRA is planning to begin to migrate its telephone enquiries call centres for businesses, individuals and benefit recipients to a new technology platform in 2018. This modern telephone technology will include a variety of new and different features that can be utilized. Prior to doing so, the CRA needed to fully understand the expectations and requirements of taxpayers (including those of tax intermediaries) who use the enquiries lines. This understanding will allow the CRA to better align these services with taxpayers' expectations. Additionally, the CRA also wanted to understand which of the newly available features would be of most interest to, and benefit for, taxpayers when accessing the various enquiries lines.

The research will provide the CRA with evidence to support the revision of service standards in order to meet taxpayers' expectations when dealing with the CRA's enquiries lines.

The overall objective of this research was to better understand taxpayers' expectations when calling the CRA's telephone enquiry lines. To meet this overall objective, the study set out to answer the following questions:

- Do taxpayers prefer to receive a message providing a wait time or a busy signal?
- What is an acceptable wait time? Does the acceptable wait time vary for different types of services?
- Are taxpayers interested in and/or likely to use self-serve Interactive Voice Response (IVR) options? Which of the existing IVR options are deemed useful? What are the perceptions of and/or interest in new options?
- What information would a new service standard need to be based on in order to be considered to be clear and transparent?
- Which of the newly available features would be preferred by callers? Which of these features would they be more/less willing to use?

3.2. Methodological Overview

A total of 804 telephone surveys were conducted with four target audiences: individuals (those who call the Individuals enquiries line), benefit recipients, businesses, and tax intermediaries. Interviews were conducted using randomly selected telephone numbers of taxpayers who had recently called one of three dedicated CRA enquiries lines (Individual, Business and Benefits enquiries lines).

A pre-test consisting of 13 English interviews and 10 French interviews was completed on July 26th, 2018. Minor changes were made before fully launching the survey on July 30th.

The survey was conducted from July 30th to August 9th, 2018. The findings can be extrapolated to Canadians who called the CRA enquiries line from July 3rd to July 17th with a margin of error of +/-3 per cent, 19 times out of 20.

The numbers presented throughout this report are rounded to the closest full number. Due to this rounding, in some cases it may appear that ratings collapsed together are different by a percentage point from when they are presented individually, and totals may not add up to 100%.

3.2.1. Sub-Group Analyses

Analysis was undertaken to establish the extent of the relationship among variables such as gender, age, region, caller type (Individual, Benefit Recipient, Business, or tax intermediary), etc. Only significant differences at the 95% confidence level are presented in this report. Any differences that are statistically significant between sub-groups are indicated with a letter in the tables throughout the report. Using the example table below, Canadians aged 18-34 were significantly more likely than those aged 35+ to say “yes”. Please note that the table below is for illustrative purposes only and does not refer to actual data collected in the survey.

	Total	Age		
Base = actual	Total	18-34 (C)	35-54 (D)	55+ (E)
	(804)	(238)	(291)	(264)
Yes	85%	92%DE	70%	71%
No	14%	5%	29%C	29%C
Don't know	1%	3%	1%	0%

4. Detailed Findings

The following section presents the detailed findings of the research along with any significant differences that were found among the different groups.

4.1. Wait Time

4.1.1. Maximum Acceptable Wait Time

On average, Canadians who call a CRA enquiries line are willing to wait 12.5 minutes to speak with an agent before hanging up and calling back at another time. There is, however, a fair bit of variation from the average (standard deviation¹: 11 minutes), suggesting the maximum wait time varies quite widely among callers (from 1 to 60 minutes).

Two-in-five Canadians are willing to wait five minutes or less (39%), while another 25 per cent are willing to wait between six and ten minutes. The bulk of the remaining third are willing to wait between 11 and 30 minutes before hanging up and calling back (29%), while 4 per cent would wait longer than 30 minutes. This means that a wait time of eleven or more minutes is acceptable to one-third (33%) of Canadians while a wait time of six minutes or longer will be acceptable to 58 per cent of Canadians and a four-minute waiting time acceptable to 87 per cent of Canadians.

Interestingly, as Canadians age, the length of time they are willing to wait to speak to an agent decreases (14.5 minutes for those 18-34, 12.9 minutes for those 35-54, and 10.2 minutes for those 55+).

Maximum acceptable wait times also vary among the different CRA enquiries lines. More specifically, fewer callers to the Business enquiries line are willing to wait more than 10 minutes compared to callers to the Individual enquiries lines (24% vs 35%).

¹ Standard deviation is a number used to tell how answers for a group are spread out from the average. A low standard deviation means that most of the numbers are very close to the average. A high standard deviation means that the numbers are spread out.

Exhibit 4.1.1 Maximum Acceptable Wait Time

	Total	Age			Enquiries Line		
Base = actual	Total	18-34 (C)	35-54 (D)	55+ (E)	Individual (M)	Benefit Recipient (N)	Business (O)
	(804)	(228)	(298)	(267)	(217)	(217)	(370)
3 Minutes or less	10%	6%	11%	12%	9%	11%	12%
4-5 Minutes	29%	29%	23%	37%D	30%	25%	28%
6-10 Minutes	25%	22%	30%	22%	21%	29%	32%M
11-30 Minutes	29%	33%	29%	25%	31%O	27%	22%
More than 30 Minutes	4%	6%	4%	2%	4%	6%O	2%
Don't Know	4%	4%	4%	3%	4%	2%	4%
Mean	12.5	14.45E	12.87E	10.21	12.65	13.12	11.27

Q4. What is the longest you would be willing to wait to speak with an agent before deciding to hang up and call back?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.1.2. Exceeding Wait Time

If Canadians knew the wait time would exceed their maximum tolerable wait time, most (72%) would prefer to receive an automated call back once an agent becomes available. Four in ten (41%) would hang up and call back at another time, while almost one quarter (24%) would like to receive a message indicating that all the agents are currently busy helping other callers and suggesting that they call back at a later time. One in five (21%) would be willing to try to complete the task in another way, such as online or using the automated telephone service.

Younger Canadians (29% vs. 14% of those 55+) and males (25% vs. 16% of females) are more likely than their counterparts to complete the task in another way. Without surprise, willingness to complete their task in another way is higher among those who indicate willingness to use the automated phone system (27% vs. 18%).

Exhibit 4.1.2 Actions Taken If Had to Wait Longer

	Total	Age			Gender		Willing to use automated phone system	
Base = actual	Total (776)	18-34 (C) (218)	35-54 (D) (291)	55+ (E) (257)	Male (F) (377)	Female (G) (399)	Yes (A) (188)	No (B) (533)
Receive automated call back once an agent available	72%	71%	76%	68%	70%	73%	74%	71%
Hang up and call back at another time	41%	47%	37%	38%	37%	44%	44%	40%
Message that all the agents are currently busy helping other callers/ suggest call back	24%	25%	21%	26%	23%	25%	32%	21%
Try to complete the task in another way	21%	29%E	21%	14%	25%G	16%	27%B	18%
Don't know	2%	0%	1%	5%D	2%	2%	0%	3%

Please note: Percentages do not add up to 100% due to multiple mentions allowed for this question

Q5. If you knew you had to wait longer than [INSERT RESPONSE TO Q4] minutes, which of the following, would you choose?

Base: Respondents who specified a maximum wait time.

4.2. Attitudes Toward Call Diversion

4.2.1. Acceptability of Call Back Option

One half of Canadians (50%) believe it is acceptable to receive a message indicating that all of the agents are currently busy helping other callers and that they would need to call back at another time. Conversely, 38% find this unacceptable. Thirteen percent express a neutral opinion, finding it neither acceptable nor unacceptable or don't know. Interestingly, callers to the Benefits enquiries line are more likely to consider calling back acceptable (59%), compared to callers to the Individual (48%) or Business enquiries lines (43%).

As mentioned above, some do consider a request to call back at another time to be unacceptable (38%) and this opinion is even more prevalent among older Canadians (51% of those aged 55+ vs. 38% of those 35-54 and 24% of those 18-34). Furthermore, those who are unwilling to use the automated phone system are also more likely to find a request to call back unacceptable (42%) compared to those who are willing to use the automated phone system (28%).

Exhibit 4.2.1a Acceptability of Being Asked to Call Back Later

	Total	Age			Enquiries Line			Willing to use automated phone system	
Base = actual	Total	18-34 (C)	35-54 (D)	55+ (E)	Individual (M)	Benefit Recipient (N)	Business (O)	Yes (A)	No (B)
	(804)	(228)	(298)	(267)	(217)	(217)	(370)	(193)	(555)
Acceptable	50%	63%DE	47%	39%	48%	59%MO	43%	58%B	46%
Neither acceptable nor unacceptable	11%	9%	15%	9%	11%	9%	15%N	11%	11%
Unacceptable	38%	24%	38%C	51%CD	39%	30%	40%N	28%	42%A
Don't know	2%	4%	1%	1%	2%	2%	2%	4%	1%

Q6a. If you received a message that all the agents are currently busy helping other callers and you had to call back at another time, how acceptable do you feel it would be to have to call back? Would it be ...?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

Findings indicate that, like most Canadians (72%), those who find it unacceptable to be required to contact the CRA again when agents are all busy would prefer an automated callback (74%) rather than having to call back themselves (34%). However, this group is significantly less likely than those who find calling back an acceptable option to consider other alternatives such as, hanging up and calling back another time (34% vs 45%); completing the task in another way (15% vs 25%) and/or receiving a message advising them they should be calling back at a later time (15% vs 31%). This suggests that once they have made the initial attempt, they are less willing to make a second or alternate attempt. Those who find it unacceptable to call back are also less likely to say they would use the CRA's automated phone service instead of a live agent (75% vs 62% very/somewhat unlikely) compared to those who find it acceptable. This suggests that there is a small group of Canadians who continue to prefer personal help and that it be on demand.

Exhibit 4.2.1b Actions Taken If Made to Wait Longer Than Own Specified Maximum Waiting Time

	Total	Acceptability of call back option	
	Total	Acceptable to call back (P)	Not Acceptable to call back (Q)
Base = actual	(776)	(375)	(291)
Receive automated call back once an agent available	72%	67%	74%
Hang up and call back at another time	41%	45%Q	34%
Message that all the agents are currently busy helping other callers/ suggest call back	24%	31%Q	15%
Try to complete the task in another way	21%	25%Q	15%
Don't know	2%	1%	4%P

Q5. If you knew you had to wait longer than [INSERT RESPONSE TO Q4] minutes, which of the following would you choose?

Base: Respondents who specified a maximum wait time.

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

Exhibit 4.2.1c Likelihood to Use Automated Phone Service Instead Of Live Agent

	Total	Acceptability of call back option	
	Total	Acceptable to call back (P)	Not Acceptable to call back (Q)
Base = actual	(804)	(391)	(300)
Very likely (5)	11%	15%Q	6%
Somewhat likely (4)	15%	15%	14%
Neither likely nor unlikely (3)	6%	7%	5%
Somewhat unlikely (2)	15%	16%	13%
Very unlikely (1)	52%	46%	62%P
Don't know	1%	2%	1%
NET: Very/somewhat likely	26%	30%Q	19%
NET: Very/somewhat unlikely	67%	62%	75%P

Q10. How likely would you be to use the CRA's automated phone service instead of talking to a live agent? Would you say you are ... ?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

It should be noted however, that few Canadians would be dissatisfied (8%) if they were required to call back. Furthermore, many are willing to call back multiple times before becoming dissatisfied with the CRA service. In fact, 70 per cent of

Canadians would be willing to call at least two times (2.7 times on average) before becoming dissatisfied with the service while 13% would be dissatisfied after calling back just one time.

Canadians 35 and older are willing to call back fewer times before becoming unsatisfied compared to those aged 18-34 (2.5-2.7 vs. 3.0.). Furthermore, those who call the Individual enquiries line, or the Benefits enquiries line are more likely than those who call the Business enquiries line to be dissatisfied before having to call back even once (10% and 6% vs. 2%).

Exhibit 4.2.1d Number of Callbacks Before Deeming Unacceptable

	Total	Age			Enquiries Line		
	Total	18-34 (C)	35-54 (D)	55+ (E)	Individual (M)	Benefit Recipient (N)	Business (O)
Base = actual	(789)	(221)	(293)	(264)	(213)	(213)	(363)
I would already be dissatisfied	8%	4%	6%	13%CD	10%O	6%O	2%
1	13%	12%	13%	15%	13%	10%	18%N
2	29%	26%	28%	34%	29%	28%	32%
3	30%	32%	30%	28%	30%	29%	31%
4 or more	11%	14%	11%	8%	9%	17%M	12%
Don't know	9%	11%E	12%E	3%	9%	11%O	5%
Mean	2.7	3.0	2.7	2.5	2.6	2.9	2.7

Q6b. How many times would you need to call back before becoming unsatisfied with the service?

Base: Respondents who provided an acceptability rating for being asked to call back

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.2.2. Preferred Call Back Options

Most Canadians (90%) are also willing to call back at a different time if it would result in faster service at that time. The exception being those callers living in the Atlantic region who are slightly less willing to call back at a different time compared to those living in other regions (82% vs. 89-95%²).

² Significant at a 90% confidence level only

Exhibit 4.2.2a Willing to Call Back At Different Time For Faster Service

	Total	Region				
Base = actual	Total	Atlantic (H)	Quebec (I)	Ontario (J)	Prairies (K)	B.C. (L)
	(804)	(43)	(19)*	(388)	(224)	(115)
Yes	90%	82%	95%	92%	91%	89%
No	8%	18%JKL	5%	7%	7%	7%
Don't know	2%	0%	0%	2%	2%	5%

* Low Base<30

Q7a. If you could be served faster at a different time of day, would you call at a different time?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

Among those who are willing to call back at a different time to be served faster, many have no preference for when to call back, be it earlier in the morning or later in the afternoon (44%). Almost one third (32%) do, however, prefer to call back earlier in the morning while one in five (21%) have a preference for late in the afternoon.

Exhibit 4.2.2b Time of Day Prefer To Call The CRA

	Total
Base = actual	(722)
Earlier in the morning	32%
Later in the afternoon	21%
It depends	2%
Both	39%
No preference	5%
Don't know/neither	1%

Q7b. Would you prefer to call the CRA ... ?

Base: Respondents who are willing to call at a different time of day for faster service

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.3. Automated Phone Service

4.3.1. Likelihood of Using Automated Phone Services

Most Canadians (67%) are unlikely (very/somewhat) to use the CRA's automated phone service instead of speaking to an agent. Older Canadians (55+) are particularly resistant towards the automated service (78% vs 60-63%). This is also the case

for Business enquiries callers who would rather speak to an agent than use the automated phone service (74% vs 65% of both Individual and Benefit Recipient enquiries callers).

Exhibit 4.3.1 Likelihood to Use Automated Phone Service Instead of Live Agent

	Total	Age			Enquiries Line		
	Total	18-34 (C)	35-54 (D)	55+ (E)	Individual (M)	Benefit Recipient (N)	Business (O)
Base = actual	(804)	(228)	(298)	(267)	(217)	(217)	(370)
Very likely (5)	11%	8%	15%	9%	12%	11%	8%
Somewhat likely (4)	15%	19%E	18%E	8%	15%	15%	13%
Neither likely nor unlikely (3)	6%	11%D	3%	6%	6%	7%	6%
Somewhat unlikely (2)	15%	15%	14%	16%	15%	16%	15%
Very unlikely (1)	52%	45%	49%	61%CD	51%	49%	59%N
Don't know	1%	1%	2%	0%	1%	1%	0%
NET: Very/somewhat likely	26%	27%E	33%E	16%	27.2%	26.3%	20.8%
NET: Very/somewhat unlikely	67%	60%	63%	78%CD	65%	65%	74%MN

Q10. How likely would you be to use the CRA's automated phone service instead of talking to a live agent? Would you say you are ... ?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.3.2. Reasons for Using Automated Phone Service

Canadians willing to use the CRA's automated phone service (26%), are open to using a variety of automated services. Individuals and Benefit enquiries line users would like to use the automated phone service to check the status of applications (88%) or instalment payment account balances (87%), to request a copy of a notice of assessment or re-assessment (85%), request a tax return package (78%), and/or request a T-slip (77%). Not surprisingly, Benefit recipients are more likely than Individual enquiries callers to use the automated service to check their account balance (98% vs 83%).

Exhibit 4.3.2a Expected Uses of Automated Phone System - Individual/Benefit Recipients

	Total	Enquiries Line	
	Total	Individual (M)	Benefit Recipient (N)
Base = actual	(104)	(52)	(52)
Check your instalment payment account balance	87%	83%	98%M
Check the status of applications, returns, adjustments or credits	88%	89%	85%
Request a copy of your notice of assessment or re-assessment	85%	83%	90%
Request a tax return package	78%	77%	81%
Request a T slip such as a T4	77%	77%	79%

Please note: Percentages do not add up to 100% due to multiple mentions allowed for this question

Q11a. Would you use the automated phone system to ... ?

Base: Respondents likely to use automated phone service

Among Business enquiries callers, interest primarily lies in using the automated phone service to check a return or refund status (87%), instalment payment account balances (81%), account balances or last payments (78%), and/or to request remittance vouchers (66%).

Exhibit 4.3.2b Expected Uses of Automated Phone System - Businesses

	Total
Base = actual	(77)
Check return or refund status	87%
Check instalment payment account balance	81%
Check account balance or last payment	78%
Request remittance voucher	66%

Please note: Percentages do not add up to 100% due to multiple mentions allowed for this question

Q11b. Would you use the automated phone system to ... ?

Base: Respondents likely to use automated phone service

4.3.3. Reasons for Not Using Automated Phone Service

Canadians who are uninterested in using the CRA's automated telephone system provide a variety of reasons for their lack of interest. Many prefer to talk to a person (43%) while others believe the automated system cannot answer their questions (32%) or that it is slow or frustrating (18%).

The system being unable to answer their questions is more prevalent for Benefits and Business enquiries callers compared to Individual enquiries callers (39-43% vs 26%). It is thus not surprising that Business enquiries callers are significantly more likely than other callers to believe that their issues require to speak to an agent (24% vs 15-16%) and that their queries are complex or require multiple questions (18% vs 5-11%).

Exhibit 4.3.3 Reason for Not Using Automated Telephone System

	Total	Enquiries Line		
Base = actual	Total (605)	Individual (M) (155)	Benefit Recipient (N) (157)	Business (O) (293)
I prefer talking to a person/Don't like automated systems	43%	46%O	46%O	32%
Automated system can't answer my questions/Doesn't have the answers I need	32%	26%	43%M	39%M
Automated system is slow/Frustrating	18%	20%	14%	14%
My issue requires an agent	17%	16%	15%	24%M
I can get the same information online/On the website	15%	16%	9%	21%N
My issue is complex/I have multiple questions/etc.	11%	11%	5%	18%M
Automated system doesn't have the options I need	8%	9%	6%	6%
Automated system is confusing/Complicated/Complex	7%	6%	10%	8%
Automated system does not understand me	4%	5%	5%	2%
Disability/Hearing impairment	1%	1%	0%	0%
Other	8%	8%	8%	7%
Don't know/Refused	1%	1%	3%	0%

Q13. Why wouldn't you be willing to use the CRA's automated telephone system?

Base: Respondents not likely to use automated phone service

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.3.4. Desired Automated Phone Service Features

Respondents who were willing to use the automated phone system had very few suggestions for additional features. In fact, most (79%) were unable to cite anything else that they would like to have (none or don't know). A small minority of callers provided a few suggestions for improvement. These included general enquiries (4%), updating information (3%), obtaining benefit information (2%), changing an address (2%), resetting a password (2%), and other miscellaneous mentions (8%).

Exhibit 4.3.4 Other Uses of Automated Phone System

	Total
Base = actual	(193)
No/None	76%
General enquiries/Information (unspecified)	4%
Update information -- Other mentions	3%
Have the option to reset password	2%
Request a callback if agents are too busy	2%
Information on benefits	2%
Change/Update address	2%
Misc. other mentions	8%
Don't know/Refused	3%

*Please note: Percentages do not add up to 100% due to multiple mentions allowed for this question Q12. Are there any other things that you would like to do using the CRA's automated phone system?
Base: Respondents likely to use automated phone service*

4.4. Service Level Reporting Expectations

4.4.1. Preference for Published Service Commitments

Canadians were asked about the way in which they would like to see the CRA's service level commitment published on the website. Two scenarios were presented:

- 1) a chance of getting through to the service needed as a percentage or;
- 2) the average number of times they would have to call before being connected to the service they needed.

Preference favours wanting to know the chance of getting through as a percentage with more than half of Canadians (52%) choosing this option, while close to one-third (31%) would prefer to know the average number of times one would have to call before being connected to an agent. A small but significant number of Canadians (17%) did not know what their preference

was or did not understand either of the service level commitment options. This tended to include predominantly older Canadians (55+) compared to their younger counterparts (22% vs 11% of those 18-34).

While overall preference is for chances of getting through as a percentage regardless of enquiries line, callers to the Benefit Recipient enquiries line were more likely to choose the option of knowing the number of times to call before being connected (38% vs 27-29%) compared to callers to the Individuals and Business enquiries line, and less likely to choose “don’t know”.

Exhibit 4.4.1 Format Preference for Service Level Expectation Message on Website

	Total	Age			Enquiries Line		
	Total	18-34 (C)	35-54 (D)	55+ (E)	Individual (M)	Benefit Recipient (N)	Business (O)
Base = actual	(804)	(228)	(298)	(267)	(217)	(217)	(370)
Chances of getting through as a percentage	52%	58%D	47%	55%	52%	51%	56%
Average number of times would have to call before being connected	31%	31%	35%E	24%	29%	38%MO	27%
Don't Know	17%	11%	18%	22%C	19%N	11%	17%N

Q8. The CRA wants to establish and publish its service commitments on their website. If you checked the website before calling the CRA, which of the following would you prefer to know?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.4.2. Wait Time Disclosure

Virtually all Canadians (94%) would find it helpful (very/somewhat) to know how long they would have to wait before speaking to an agent.

Exhibit 4.4.2 Helpfulness of Knowing Wait Time Before Speaking with Agent

	Total
Base = actual	(804)
Very helpful (4)	78%
Somewhat helpful (3)	16%
Not very helpful (2)	3%
Not at all helpful (1)	3%
Don't know	1%
NET: Very/somewhat helpful	94%
NET: Not very/ at all helpful	5%

Q9. When calling a CRA call centre, how helpful would it be for you to know how long you will have to wait before you reach an agent? Would it be ...?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.5. Confirmation of Identity

4.5.1. Preferred Method to Confirm Identify

In order for the CRA to share personal information over the phone, they need to confirm a caller's identity. Exploring the preferred method of doing so revealed that most Canadians (59%) prefer to be asked for their Social Insurance Number (SIN) and a series of other questions. Many Canadians (38%) also find a Personal Identification Number (PIN) to be a viable option, and to a lesser extent, voice authentication (28%).

Exhibit 4.5.1a Preferred Methods for Confirming ID

	Total
Base = actual	(403)
Be asked for your Social Insurance Number plus a series of other questions such as a specific amount on your previous tax return, date of birth, name, etc.	59%
Set up a personal identification number or PIN, like you would have on a bank card or telephone banking.	38%
By voice authentication. This is a type of user authentication that confirms your identity through the unique patterns of your voice, similar to a finger print.	28%
Don't know	3%

Q14. Before sharing any personal information over the phone, the CRA must ensure they are talking to the right person. To do this, they need to confirm a caller's identity. Which of the following would you want the CRA to use to confirm your identity?

Base: Respondents who called the Individual or Benefit Recipient enquiries lines

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

Among those who would want to confirm their identity with a PIN, more than half (57%) would prefer registering for a PIN online through their My Account service while more than a third (37%) would prefer to register over the phone with an agent. Those who are willing to use an automated phone service are more likely to prefer PIN registration online through My Account (77% vs. 48% among those who are not willing to use the automated phone system).

Exhibit 4.5.1b Preference for PIN Registration

	Total	Willing to use automated phone system	
	Total	Yes (A)	No (B)
Base = actual	(150)	(48)	(93)
Online through My Account	57%	77%B	48%
Set it up with the assistance of an agent on the phone	37%	19%	45%A
Don't know	6%	4%	7%

Q15. How would you prefer to register for a PIN? Would you ... ?

Base: Respondents who selected a PIN to confirm ID

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

4.6. Respondent Profile

Survey completions were somewhat evenly distributed among those aged 18 to 34 (30%), those aged 35 to 54 (36%) and those aged 55 and above (33%). Gender was also evenly split between men (52%) and women (49%). The majority of responses were from two regions, with half (50%) being from Ontario and more than one quarter (28%) from the Prairies. The remaining completion were from respondents in BC (14%), the Atlantic provinces (5%) and Quebec (2%). Fourteen percent of the respondents interviewed were tax intermediaries.

Exhibit 4.6a Age

	Total
Base = actual	(804)
18 to 34	30%
35 to 54	36%
55 or older	33%
Refused	1%

Q16a/b. In what year were you born? Would you be willing to tell me in which of the following age categories you belong?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

Exhibit 4.6b Gender

	Total
Base = actual	(804)
Female	49%
Male	52%

Q17. Record gender

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.

Exhibit 4.6.c Province

	Total
Base = actual	(804)
Ontario	50%
British Columbia	14%
Prairies	28%
Atlantic	5%
Quebec	2%
Refused	2%

Q18. In which province or territory do you live?

Base: All respondents

Note: Numbers are rounded to the closest full number. Totals may not add up to 100%.



5. Methodology

5.1. Methodological Overview

A total of 804 telephone surveys were conducted with four target audiences: individuals (those who call the Individuals enquiries line), benefit recipients, businesses, and tax intermediaries. Interviews were conducted using randomly selected telephone numbers of taxpayers who had recently called one of three dedicated CRA enquiries lines (Individual, Business and Benefits enquiries lines).

5.1.1. Questionnaire

Kantar TNS, in collaboration with CRA, designed the survey instrument. The final, approved instrument was translated into French by the CRA. The English survey took an average of 9.1 minutes to complete and ranged from 3.9 to 23.3 minutes. The French survey took an average of 10.3 minutes to complete and ranged in length from 3.6 to 15.2 minutes.

5.1.2. Programming

Once the English and French questionnaires were finalized, they were programmed into the Computer Assisted Telephone Interview (CATI) system. This was done by experienced programmers. After programming, the questionnaires underwent extensive testing to ensure that everything was working exactly as intended.

The CRA was supplied with a test link that allowed them to conduct their own tests. Feedback was incorporated where needed before continuing with pre-testing the survey.

5.1.3. Survey Pre-test

The survey went through extensive pilot testing (without a respondent) and pre-testing (with a respondent).

After testing each individual section, the entire survey was pilot tested (without a respondent) to ensure all aspects of the questionnaire were functioning as intended. The pilot involved ensuring the wording was exactly as intended, that the skip patterns and logic were correct and that the questions were clear and concise. The process was also automated (autopilot) by applying the questionnaire to dummy records and checking the output to ensure that proper routing through the questionnaire had occurred. Once confirmation was received that the verbatim and logic were correct in English, the French questionnaire

was also reviewed in the same manner outlined above to ensure it was also correct. By testing the two languages separately, quality in both languages was ensured.

A pre-test consisting of 13 English interviews and 10 French interviews was completed on July 26th, 2018. The results were reviewed to ensure the survey was working as expected and that the questions were being interpreted as expected. Minor changes were made before launching the survey on July 30th.

The survey was originally registered with the Marketing Research and Intelligence Association (MRIA) Survey Registration System where respondents could validate the research. Following the announcement of the cessation of the MRIA's activities part way through the fieldwork, the Survey Registration System became defunct and the statement was removed from the survey introduction.

5.1.4. Sample Design and Selection

As mentioned previously, the sample list was provided by the CRA and comprised of randomly selected telephone numbers of taxpayers who had called the CRA on any of the three dedicated telephone lines in the two weeks prior to the survey period (from July 3-17). The sample list consisted of three target groups:

1. Individuals (those who called the Individual enquiries line)
2. Benefit recipients
3. Businesses

Tax intermediaries came from all three enquiries lines and were identified during the survey.

5.1.5. Survey Administration

The telephone survey was conducted using computer assisted telephone interviewing (CATI) technology. CATI ensures the interview flows as it should with pre-programmed skip patterns. It also controls responses to ensure appropriate ranges and data validity. Sample is imported directly into the survey to ensure accurate recording of sample variables such as enquiries line. The system also controls automated scheduling and call-backs to ensure all appointments are adhered to.

Surveys were conducted in English or French as chosen by the respondent. Interviewing was conducted by fully trained interviewers and supervisors. A minimum of five per cent of all interviews were independently monitored and validated in real time.

All participants were informed of the general purpose of the research, they were informed of the sponsor and the supplier and that all their responses would be confidential.

5.1.6. Margin of Error

A sample of 804 drawn from the Canadian adult population who called the CRA enquiries line from July 3rd to July 17th would produce a margin of error of +/- 3 per cent, 19 times out of 20.

5.1.7. Weighting

Survey quotas were put in place so that a sufficient number of telephone interviews were conducted with each of the four target audiences (approximately 200 for each). Weighting was then used to ensure that the results of the survey reflected the opinions of the actual proportions of Canadians phoning each of the CRA's enquiries lines. For example, due to survey sampling quotas, our completions resulted in 27% being from the Individual enquiries line while 61% of calls came through the Individual enquiries line in the past year. Therefore, the results had to be weighted up to reflect these proportions.

The following table shows the unweighted sample (actual completions) versus the weighted sample (weighted completions).

Exhibit 5.1.7 Weighted vs. Unweighted Data

	Unweighted	Weighted
Base	(804)	(804)
	100%	100%
Individual tax enquiries	217	490
	27%	61%
Benefit enquiries	217	169
	27%	21%
Business enquiries	370	145
	46%	18%

5.1.8. Response Rate

A total of 22,940 phone numbers were dialed, of which 804 completed the survey (21 French and 783 English). The overall response rate achieved for the telephone study was 5.57%. The following table outlines the sample disposition and response rate as per the MRIA guidelines.

Exhibit 5.1.8 Response Rate Calculation

Total Numbers Attempted	22940
Invalid	1877
Not in Service	1859
Fax/modem	18
Business/non-residential	0
Unresolved (U)	14398
Busy	242
No answer	5704
Answering machine	8452
In-scope - non-responding (IS)	5491
Language problem	88
Illness, incapable	
Selected respondent not available	2265
Household refusal	3137
Respondent refusal	
Qualified respondent break-off	1
In-scope - Responding units (R)	1174
Language disqualify	0
No one 18+	0
Other disqualify	370
Completed interviews	804
Response Rate = $R/(U+IS+R)$	5.57%

5.1.9. Non-response Bias

In order to maximize responses, Kantar TNS undertook the following:

- A minimum of 5 call backs was made before retiring a number.
- Call backs were rescheduled at different times and days in order to maximize the possibility of an answer.
- Appointments and call backs were offered at flexible times so respondents may take the survey at the most convenient time.

Non-response bias is the bias that results when respondents differ in meaningful ways from non-respondents. When population data is available, we can undertake an analysis to determine if the sample population differs from the population

under study; in this case, callers to the CRA enquiries lines. Demographic data for callers to the CRA enquiries line was not available and as such a comparison could not be undertaken to assess non-response by demographics.

5.1.10. Tabulated Data

Detailed tables are included under separate cover.

6. Appendix A: Survey Instrument

6.1. English Survey

CRA Call Centre Expectations – Final Questionnaire

NOTES TO READER:

The respondents to this survey will all have recently called the CRA, so will have some recent and personal context on which to base their answers.

The questionnaire will be pre-tested before full launch.

For Individuals and Benefits Call Centres, “busy signals” have almost been completely eliminated, replaced with a recorded message saying lines are busy and the automated system is available.

For Business Call Centres, a busy signal is still possible but will be eliminated with the new system.

Hello/Bonjour my name is INSERT NAME, from Kantar TNS, a market research firm. We are conducting a survey on behalf of the Government of Canada. The purpose of the survey is to inform the Canada Revenue Agency of Canadians’ preferences and expectations when accessing the CRA’s call centres. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

We would like to speak with people who have recently contacted the CRA. Have you or someone at this number recently called a CRA call centre?

IF YES, QUALIFY, CONTINUE

IF NO, BUT SOMEONE ELSE AT THIS NUMBER CALLED. ASK: May I speak with that person, please?

IF REFERRED TO ANOTHER PERSON, START FROM THE TOP. IF PERSON IS NOT AVAILABLE, TERMINATE

IF DON’T KNOW / UNAWARE OF WHO MAY HAVE CALLED, TERMINATE

INTERVIEWER INSTRUCTION: SOME CALLERS MAY HAVE CONCERNS DUE TO RECENT CRA SCAMS PLEASE ASSURE THEM THIS IS JUST A SURVEY TO ASSESS CALL CENTRE PREFERENCES AND WE WILL NOT BE ASKING ANY PERSONAL INFORMATION OR INFORMATION ABOUT THEIR PERSONAL TAXES

Your participation in this survey is voluntary. Your responses will be kept entirely confidential and anonymous. This survey will take about 10 minutes to complete.

[IF ASKED: Kantar TNS is a professional research company hired by the Government of Canada to conduct this survey]

[IF ASKED: Kantar TNS privacy policy can be found here: <http://www.tnscanada.ca/privacy-policy.html>]

QUOTAS:

200 INDIVIDUALS

200 BENEFITS RECIPIENTS

400 BUSINESS

FOR QUOTA PURPOSES THOSE WHO ARE TAX INTERMEDIARIES ARE CODED AS BUSINESS REGARDLESS OF SAMPLE OTHERWISE USE SAMPLE TO DRIVE QUOTAS

CLASSIFICATION:

1. Are you a tax professional who works with individuals or businesses on tax-related or payroll matters?
 - (IF RESPONDENT IS STRUGGLING, SAY: A tax intermediary, someone that you hire to deal with taxes on behalf of an individual or business.)
 - a. Yes
 - b. No

INSTRUCTION TO INTERVIEWER: CODE DON'T KNOW AS NO

2. HIDDEN QUESTION: TAX INTERMEDIARY – IF YES AT Q1 CODE AS TAX INTERMEDIARY
3. HIDDEN QUESTION: SAMPLE: CODE AS INDIVIDUAL, BENEFIT RECIPIENT, BUSINESS

DISPLAY

The CRA tries to use its resources to provide good service and have the right number of telephone agents available to answer calls. As such, the CRA wants to understand how to meet the needs of Canadians efficiently while providing quality and cost-effective service.

WAIT TIMES AND CALL DIVERSION

4. What is the longest you would be willing to wait to speak with an agent before deciding to hang up and call back?

(IF RESPONDENT SAYS 5 TO 10 MINUTES, PLEASE ASK: is that 5 or 10 minutes?)
OPEN (INTERVIEWER INSTRUCTION RECORD AS MINUTES)

INTERVIEWER INSTRUCTION: WE ARE TRYING TO UNDERSTAND AT WHAT POINT THE PERSON IS NO LONGER WILLING TO WAIT AND WOULD RATHER JUST HANG UP AND CALL BACK AT ANOTHER TIME.

5. If you knew you had to wait longer than [INSERT RESPONSE TO Q4] minutes, which of the following, would you choose: (INTERVIEWER PROMPT: ANY OTHERS?)

INTERVIEWER INSTRUCTION: Please ensure respondents understand this is about the future NOT what they have done in the past.

INTERVIEWER INSTRUCTION: Get a yes/ no for each attribute.

RANDOMIZE LIST. READ LIST. SELECT ALL THAT APPLY

- a. Hang up and call back at another time
 - b. Try to complete the task in another way, such as online or using the automated telephone service
 - c. To receive a message that all the agents are currently busy helping other callers and suggest that you should call back at a later time
 - d. To receive an automated call back once an agent becomes available.
 - e. DO NOT READ: Don't know
6. a. If you received a message that all the agents are currently busy helping other callers and you had to call back at another time, how acceptable do you feel it would be to have to call back? Would it be ...?
- a. Acceptable
 - b. Neither acceptable nor unacceptable
 - c. Unacceptable
 - d. DON'T KNOW (DO NOT READ)

PROGRAMMING INSTRUCTION: DO NOT ASK Q6B IF DON'T KNOW AT Q6A

6. b. How many times would you need to call back before becoming unsatisfied with the service?

OPEN NUMERIC VALUE

I would already be dissatisfied (DO NOT READ)

7. a. If you could be served faster at a different time of day, would you call at a different time?
- a. Yes
 - b. No
 - c. Don't know (DO NOT READ)

[IF YES IN Q7A, ASK:]

7. b. Would you prefer to call the CRA ...? READ LIST

- a. Earlier in the morning
- b. Later in the afternoon
- c. Both
- d. No Preference (Do not read)
- e. It depends (DO NOT READ)
- f. Don't know/neither (DO NOT READ)

SERVICE LEVEL EXPECTATIONS AND REPORTING

8. The CRA wants to establish and publish its service commitments on their website. If you checked the website before calling the CRA, which of the following would you prefer to know? **(Randomize A and B)**
- a. Your chances of getting through to the service you need as a percentage. For example, 75% of the time you would be connected to the service you need on your first call.
 - b. The average number of times you would have to call before being connected to the service you need. For example, you would typically need to call twice before being connected to the service you need.
 - c. Don't know / I don't understand what either of these mean (DO NOT READ)
9. When calling a CRA call centre, how helpful would it be for you to know how long you will have to wait before you reach an agent? Would it be ...?
- a. Very helpful
 - b. Somewhat helpful
 - c. Not very helpful
 - d. Not at all helpful
 - e. DON'T KNOW (DO NOT READ)

DISPLAY

When callers with simple issues or questions use the CRA's automated phone system instead of a live agent, more agents are available to personally assist callers with more complex issues. We would now like to ask you a few questions about the CRA's automated phone system.

ALTERNATIVE SERVICES

10. How likely would you be to use the CRA's automated phone service instead of talking to a live agent?
Would you say you are:
- a. Very likely
 - b. Somewhat likely
 - c. Neither likely nor unlikely
 - d. Somewhat unlikely
 - e. Very unlikely
 - f. Don't know (DO NOT READ)

PROGRAMMING INSTRUCTION: ASK Q11 IF Q10=A OR B

11. Would you use the automated phone system to:

RANDOMIZE ANSWER LISTS

RESPONSE LIST

- a. Yes
- b. No
- c. Don't know (DO NOT READ)

PROGRAMMING INSTRUCTION: THE FOLLOWING LIST IS FOR INDIVIDUALS AND BENEFITS RECIPIENTS AS DEFINED BY THE SAMPLE

IVR Individual and Benefits List

- a. Request a tax return package
- b. Request a copy of your notice of assessment or re-assessment
- c. Request a T slip such as a T4
- d. Check your instalment payment account balance
- e. Check the status of applications, returns, adjustments or credits

PROGRAMMING INSTRUCTION: THE FOLLOWING IS FOR BUSINESSES AS DEFINED BY THE SAMPLE

IVR Business List

- a. Request remittance voucher
- b. Check account balance or last payment
- c. Check return or refund status
- d. Check instalment payment account balance

PROGRAMMING INSTRUCTION; ASK Q12 IF Q11 WAS ASKED

12. Are there any other things that you would like to do using the CRA's automated phone system?

OPEN

PROGRAMMING INSTRUCTION: ASK Q13 IF Q10 = C, D or E

13. Why wouldn't you be willing to use the CRA's automated telephone system?

OPEN

PROGRAMMING INSTRUCTION: DO NOT ASK Q14 TO TAX INTERMEDIARIES OR BUSINESSES

14. Before sharing any personal information over the phone, the CRA must ensure they are talking to the right person. To do this, they need to confirm a caller's identity. Which of the following would you want the CRA to use to confirm your identity? (INTERVIEWER PROMPT: ANY OTHERS?) SELECT ALL THAT APPLY

RANDOMIZE LIST. READ LIST.

- a. Be asked for your Social Insurance Number plus a series of other questions such as a specific amount on your previous tax return, date of birth, name, etc.
- b. Set up a personal identification number or PIN, like you would have on a bank card or telephone banking.
- c. By voice authentication. This is a type of user authentication that confirms your identity through the unique patterns of your voice, similar to a finger print.
- d. Don't know (DO NOT READ)

PROGRAMMING INSTRUCTION: ASK Q15 IF Q14=b

15. How would you prefer to register for a PIN? Would you...

RANDOMIZE LIST. CHOOSE ONLY ONE.

- a. Set it up with the assistance of an agent on the phone
- b. Online through My Account
- c. Don't know (DO NOT READ)

DEMOS

Now just a few questions for classification purposes.

16. a. In what year were you born?

INTERVIEWER: RECORD YEAR

a. Refuse (DO NOT READ)

[IF PREFER NOT TO PROVIDE A PRECISE BIRTH YEAR, ASK16b]

16. b. Would you be willing to tell me in which of the following age categories you belong?

- a. 18 to 34
- b. 35 to 49
- c. 50 to 54
- d. 55 to 64
- e. 65 or older?
- f. Refuse (DO NOT READ)

17. RECORD GENDER

- a. Female
- b. Male

18. In which province or territory do you live: CODE

- a. British Columbia
- b. Alberta
- c. Saskatchewan
- d. Manitoba
- e. Ontario
- f. Quebec
- g. Nova Scotia
- h. New Brunswick
- i. Prince Edward Island
- j. Newfoundland and Labrador
- k. Northwest Territories
- l. Nunavut
- m. Yukon
- n. Refused

THANK YOU! THOSE ARE ALL THE QUESTIONS THAT I HAVE FOR YOU TODAY.

6.2. French Survey

Attentes à l'égard des centres d'appels de l'Agence du revenu du Canada – Questionnaire définitif

REMARQUES À L'INTENTION DU LECTEUR :

Les répondants à ce sondage auront tout récemment communiqué avec l'Agence. Par conséquent, ils pourront répondre en fonction de leur expérience récente et personnelle.

Le questionnaire fera l'objet d'essais préliminaires avant d'être utilisé officiellement.

Les « tonalités de ligne occupée » des centres d'appels pour les particuliers et de ceux pour les bénéficiaires de prestations ont presque toutes été éliminées et remplacées par un message enregistré indiquant que les lignes sont occupées et qu'un système automatisé est disponible.

Dans le cas des centres d'appels pour les entreprises, il est encore possible d'obtenir une tonalité de ligne occupée, mais celle-ci sera éliminée à l'arrivée du nouveau système.

Bonjour/hello, je m'appelle INSÉREZ LE NOM et je travaille pour Kantar TNS, une firme spécialisée en étude de marché. Nous réalisons un sondage au nom du gouvernement du Canada. Le but de ce sondage est d'informer l'Agence du revenu du Canada des préférences et des attentes des Canadiens en matière de communication avec les centres d'appels de l'Agence.

Aimeriez-vous que je poursuive en français ou en anglais? Would you prefer that I continue in English or French?

Nous souhaitons parler avec des gens qui ont récemment communiqué avec l'Agence. Avez-vous, ou une autre personne joignable à ce même numéro, communiqué avec un centre d'appel de l'Agence récemment?

SI LA RÉPONSE EST OUI, POURSUIVEZ.

SI LA RÉPONSE EST NON, MAIS QUE QUELQU'UN D'AUTRE JOIGNABLE AU MÊME NUMÉRO A APPELÉ, DEMANDEZ : Puis-je parler à cette personne, s'il vous plaît?

SI ON VOUS MET EN COMMUNICATION AVEC UNE AUTRE PERSONNE, RECOMMENCEZ DU DÉBUT. SI LA PERSONNE N'EST PAS DISPONIBLE, METTEZ FIN À LA CONVERSATION.

SI LA PERSONNE NE SAIT PAS QUI A PU APPELER, METTEZ FIN À LA CONVERSATION.

INSTRUCTION À L'INTENTION DE L'INTERVIEWEUR : CERTAINS APPELANTS POURRAIENT EXPRIMER LEURS PRÉOCCUPATIONS LIÉES AUX ARNAQUES DONT L'AGENCE A ÉTÉ VICTIME RÉCEMMENT. VEUILLEZ LEUR DIRE QU'IL S'AGIT UNIQUEMENT D'UN SONDAGE ET QUE NOUS NE LEUR DEMANDERONS PAS DE RENSEIGNEMENTS PERSONNELS NI DE RENSEIGNEMENTS LIÉS À L'IMPÔT SUR LEUR REVENU.

La participation à ce sondage est volontaire. Vos réponses resteront strictement confidentielles et anonymes. Vous aurez besoin de 10 minutes pour y répondre.

[SI ON VOUS LE DEMANDE : Kantar TNS est une entreprise spécialisée en études de marché à laquelle le gouvernement du Canada a fait appel pour mener ce sondage.]

[SI ON VOUS LE DEMANDE : La politique sur la vie privée de Kantar TNS se trouve à l'adresse suivante : <http://www.tnscanada.ca/politique-de-protection-de-la-vie-privee.html>.]

QUOTAS :

200 PARTICULIERS

200 BÉNÉFICIAIRES DE PRESTATIONS

400 ENTREPRISES

POUR L'ATTEINTE DES QUOTAS, ON ATTRIBUE AUX INTERMÉDIAIRES FISCAUX LE CODE DES ENTREPRISES, INDÉPENDAMMENT DE L'ÉCHANTILLON. AUTREMENT, UTILISEZ L'ÉCHANTILLON POUR ASSURER LE RESPECT DES QUOTAS.

CLASSIFICATION :

Êtes-vous un professionnel/une professionnelle de l'impôt qui travaille avec les particuliers ou les entreprises sur des dossiers liés à l'impôt ou à la paie?

- (SI LE RÉPONDANT A DE LA DIFFICULTÉ À RÉPONDRE, DITES : Un intermédiaire fiscal est une personne dont vous retenez les services pour traiter des impôts au nom d'une personne ou d'une entreprise.)

1.

- a. Oui
- b. Non

INSTRUCTION À L'INTENTION DE L'INTERVIEWEUR : SI LA PERSONNE NE SAIT PAS, INDIQUEZ « NON ».

2. QUESTION CACHÉE : INTERMÉDIAIRE FISCAL – SI LA RÉPONSE À LA QUESTION 1 EST OUI, INDIQUEZ QU'IL S'AGIT D'UN INTERMÉDIAIRE FISCAL.
3. QUESTION CACHÉE : ÉCHANTILLON – INDIQUEZ QU'IL S'AGIT D'UN PARTICULIER, D'UN BÉNÉFICIAIRE DE PRESTATIONS, D'UNE ENTREPRISE.

À AFFICHER

L'Agence essaie d'utiliser ses ressources pour fournir aux contribuables un bon service et elle tente aussi de faire en sorte que suffisamment d'agents des services téléphoniques soient disponibles pour répondre aux appels. Par conséquent, elle veut comprendre comment répondre efficacement aux besoins des Canadiens tout en offrant un service rentable et de qualité.

TEMPS D'ATTENTE ET TRANSFERT DES APPELS

4. Pendant combien de temps êtes-vous prêt(e) à patienter pour parler à un agent avant de décider de raccrocher et de rappeler?

(SI LE RÉPONDANT DIT « 5 À 10 MINUTES, DITES : Est-ce 5 ou 10 minutes?)

QUESTION OUVERTE (INSTRUCTION À L'INTENTION DE L'INTERVIEWEUR : CONSIGNEZ LA RÉPONSE EN MINUTES.)

INSTRUCTION À L'INTENTION DE L'INTERVIEWEUR : NOUS ESSAYONS DE COMPRENDRE À QUEL MOMENT LA PERSONNE N'EST PLUS DISPOSÉE À ATTENDRE ET PRÉFÈRE SIMPLEMENT RACCROCHER ET RAPPELER PLUS TARD.

5. Si vous saviez que vous devriez attendre plus de [INSÉREZ LA RÉPONSE À LA QUESTION 4] minutes, laquelle des options suivantes choisiriez-vous? (INTERVIEWEUR : DEMANDEZ DE NOUVEAU - AUTRE CHOSE?)

INSTRUCTION À L'INTENTION DE L'INTERVIEWEUR : Veuillez vous assurer que les répondants comprennent qu'il s'agit de ce qu'ils feraient à l'avenir ET NON de ce qu'ils ont fait dans le passé.

INSTRUCTION À L'INTENTION DE L'INTERVIEWEUR : Veuillez obtenir un oui ou un non pour chaque énoncé.

RÉPARTISSEZ LES ÉLÉMENTS DE LA LISTE AU HASARD. LISEZ LES ÉLÉMENTS DE LA LISTE. SÉLECTIONNEZ TOUTES LES RÉPONSES QUI S'APPLIQUENT.

- f. Raccrocher et rappeler plus tard.
 - a. Essayer d'accomplir la tâche d'une autre façon, comme en ligne ou à l'aide du service téléphonique automatisé.
 - b. Recevoir un message indiquant que tous les agents sont actuellement occupés à aider d'autres appelants et vous invitant à rappeler plus tard.
 - c. Recevoir un retour d'appel automatisé lorsqu'un agent se libère.
 - d. NE LISEZ PAS CETTE PARTIE : Ne sait pas
6. a. Si vous receviez un message vous indiquant que tous les agents sont actuellement occupés et vous invitant à rappeler plus tard, dans quelle mesure trouvez-vous qu'il est acceptable de devoir rappeler? Diriez-vous qu'une telle situation est ...
- a. Acceptable
 - b. Ni acceptable ni inacceptable
 - c. Inacceptable
 - d. NE SAIT PAS (NE LISEZ PAS CETTE PARTIE.)

INSTRUCTION DE PROGRAMMATION : NE PAS POSER LA QUESTION 6B SI LA PERSONNE RÉPOND « JE NE SAIS PAS » À LA QUESTION 6A.

6. b. Si vous devez rappeler pour parler à un agent, après combien de tentatives serez-vous insatisfait(e) du service?

VALEUR NUMÉRIQUE NON DÉTERMINÉE

Je serais déjà insatisfait(e). (NE LISEZ PAS CETTE PARTIE.)

7. a. Si vous pouviez être servi(e) plus rapidement à un autre moment de la journée, appelleriez-vous à cet autre moment?

- a. Oui
- b. Non
- c. Ne sait pas (NE LISEZ PAS CETTE PARTIE.)

[SI LA RÉPONSE À LA QUESTION 7A EST OUI, POSEZ LA QUESTION SUIVANTE :]

7. b. Préférez-vous communiquer avec l'Agence...? LISEZ LES ÉLÉMENTS DE LA LISTE

- a. Plus tôt le matin
- b. Plus tard en après-midi
- c. Les deux
- d. Aucune préférence (NE LISEZ PAS CETTE PARTIE)
- e. Ça dépend (NE LISEZ PAS CETTE PARTIE)
- f. Ne sait pas ou aucune de ces réponses (NE LISEZ PAS CETTE PARTIE.)

ATTENTES ET ÉTABLISSEMENT DE RAPPORTS CONCERNANT LE NIVEAU DU SERVICE

8. L'Agence souhaite établir et publier ses engagements en matière de service sur son site Web. Si vous consultiez le site Web avant d'appeler l'Agence, laquelle des informations suivantes préféreriez-vous savoir? (**Randomisez A et B**)
- a. Vos chances d'obtenir le service dont vous avez besoin en pourcentage. Par exemple, vous obtiendriez le service dont vous avez besoin dès le premier appel dans 75 % des cas.
 - b. Le nombre d'appels que vous devrez faire, en moyenne, avant d'obtenir le service dont vous avez besoin. Par exemple, vous devriez appeler deux fois, généralement, avant d'obtenir le service dont vous avez besoin.
 - c. Ne sait pas ou ne comprend pas ni l'un ni l'autre des énoncés. (NE LISEZ PAS CETTE PARTIE.)

9. Lorsque vous communiquez avec un centre d'appels de l'Agence, dans quelle mesure vous serait-il utile de connaître le temps d'attente avant de pouvoir parler à un agent? Diriez-vous que cette information serait ...
- a. Très utile
 - b. Plutôt utile
 - c. Pas très utile
 - d. Pas du tout utile
 - e. NE SAIT PAS (NE LISEZ PAS CETTE PARTIE.)

À AFFICHER

Lorsque les appelants qui ont des problèmes ou des questions simples utilisent le système téléphonique automatisé de l'Agence au lieu de parler à un agent, plus d'agents sont disponibles pour aider personnellement les appelants aux prises avec des problèmes plus complexes. Nous aimerions maintenant vous poser quelques questions sur le système téléphonique automatisé de l'Agence.

AUTRES SERVICES

10. Dans quelle mesure seriez-vous prêt(e) à utiliser le système téléphonique automatisé de l'Agence au lieu de parler à un agent? Diriez-vous que ce serait ...
- a. Très probable
 - b. Plutôt probable
 - c. Ni probable ni improbable
 - d. Plutôt improbable
 - e. Très improbable
 - f. Ne sait pas (NE LISEZ PAS CETTE PARTIE.)

INSTRUCTION DE PROGRAMMATION : POSER LA QUESTION 11 SI LA RÉPONSE À LA QUESTION 10 EST A OU B.

11. Utiliseriez-vous le système téléphonique automatisé pour :

RÉPARTISSEZ LES ÉNONCÉS DE LA LISTE AU HASARD

LISTE DE RÉPONSES

- a. Oui
- b. Non
- c. Ne sait pas (NE LISEZ PAS CETTE PARTIE.)

INSTRUCTION DE PROGRAMMATION : LA LISTE SUIVANTE CONCERNE LES PARTICULIERS ET LES BÉNÉFICIAIRES DE PRESTATIONS SELON LA DÉFINITION DE L'ÉCHANTILLON.

Liste des énoncés concernant les particuliers et les bénéficiaires de prestations qui utiliseraient le système de réponse vocale interactive.

- a. Demander une trousse de déclaration de revenus
- b. Demander une copie de votre avis de cotisation ou de nouvelle cotisation
- c. Demander un feuillet T, comme un feuillet T4
- d. Vérifier le solde de votre compte pour le versement d'acomptes provisionnels
- e. Vérifier l'état des demandes, des déclarations, des redressements ou des crédits

INSTRUCTION DE PROGRAMMATION : LA LISTE SUIVANTE CONCERNE LES ENTREPRISES SELON LA DÉFINITION DE L'ÉCHANTILLON.

Liste des énoncés concernant les entreprises qui utiliseraient le système de réponse vocale interactive.

- a. Demander une pièce de versement
- b. Vérifier le solde d'un compte ou le montant du dernier paiement
- c. Vérifier l'état d'une déclaration ou d'un remboursement
- d. Vérifier le solde d'un compte pour le versement d'acomptes provisionnels

INSTRUCTION DE PROGRAMMATION : POSER LA QUESTION 12 SI LA QUESTION 11 A ÉTÉ POSÉE.

12. Aimerez-vous faire autre chose au moyen du système téléphonique automatisé de l'Agence?

QUESTION OUVERTE

INSTRUCTION DE PROGRAMMATION : POSER LA QUESTION 13 SI LA RÉPONSE À LA QUESTION 10 EST C, D ou E.

13. Pourquoi ne seriez-vous pas prêt(e) à utiliser le système téléphonique automatisé de l'Agence?

QUESTION OUVERTE

INSTRUCTION DE PROGRAMMATION : NE PAS POSER LA QUESTION 14 AUX INTERMÉDIAIRES FISCAUX NI AUX ENTREPRISES.

14. Avant de divulguer des renseignements personnels par téléphone, l'Agence doit s'assurer de parler à la bonne personne. Pour ce faire, elle doit confirmer l'identité de l'appelant. De quelle manière aimeriez-vous que l'Agence confirme votre identité? (INTERVIEWEUR : DEMANDEZ DE NOUVEAU - AUTRE CHOSE?)
SÉLECTIONNEZ TOUTES LES RÉPONSES QUI S'APPLIQUENT.

RÉPARTISSEZ LES ÉLÉMENTS DE LA LISTE AU HASARD. LISEZ LES ÉLÉMENTS DE LA LISTE.

- a. Vous aimeriez qu'on vous demande de fournir votre numéro d'assurance sociale et de répondre à une série de questions; on pourrait vous demander un montant précis figurant sur votre déclaration de revenus, votre date de naissance, votre nom, etc.
- b. Vous aimeriez obtenir un numéro d'identification personnel, ou NIP, comme le NIP d'une carte bancaire ou d'un service bancaire par téléphone.
- c. Vous aimeriez utiliser un système d'authentification vocale. Il s'agit d'un type d'authentification de l'utilisateur qui a pour but de confirmer votre identité au moyen de vos caractéristiques vocales uniques, lesquelles rappellent l'empreinte digitale.
- d. Ne sait pas (NE LISEZ PAS CETTE PARTIE.)

INSTRUCTION DE PROGRAMMATION : POSER LA QUESTION 15 SI LA RÉPONSE À LA QUESTION 14 EST b.

15. De quelle manière aimeriez-vous obtenir un NIP? Préférez-vous...?

RÉPARTISSEZ LES ÉLÉMENTS DE LA LISTE AU HASARD. SÉLECTIONNEZ UNE SEULE RÉPONSE.

- a. Le créer avec l'aide d'un agent, par téléphone.
- b. Le créer en ligne, au moyen du service Mon dossier.
- c. Ne sait pas (NE LISEZ PAS CETTE PARTIE.)

QUESTIONS DÉMOGRAPHIQUES

Maintenant, quelques questions qui serviront à des fins de classification.

16. a. En quelle année êtes-vous né(e)?

INTERVIEWEUR : CONSIGNEZ L'ANNÉE.

a. Refuse de répondre (NE LISEZ PAS CETTE PARTIE.)

[SI LE RÉPONDANT PRÉFÈRE NE PAS FOURNIR SON ANNÉE DE NAISSANCE EXACTE, POSEZ-LUI LA QUESTION 16b.]

16. b. Seriez-vous disposé(e) à me dire à quel groupe d'âge vous appartenez?

- a. De 18 à 34 ans
- b. De 35 à 49 ans
- c. De 50 à 54 ans
- d. De 55 à 64 ans
- e. 65 ans et plus
- f. Refuse de répondre (NE LISEZ PAS CETTE PARTIE.)

17. CONSIGNEZ LE GENRE.

- a. Femme
- b. Homme

18. Dans quelle province ou quel territoire vivez-vous? (À CODER)

- a. Colombie-Britannique
- b. Alberta
- c. Saskatchewan
- d. Manitoba
- e. Ontario
- f. Québec
- g. Nouvelle-Écosse
- h. Nouveau-Brunswick
- i. Île-du-Prince-Édouard
- j. Terre-Neuve-et-Labrador
- k. Territoires du Nord-Ouest
- l. Nunavut
- m. Yukon
- n. Refuse

MERCI! JE N'AI PAS D'AUTRES QUESTIONS À VOS POSER.