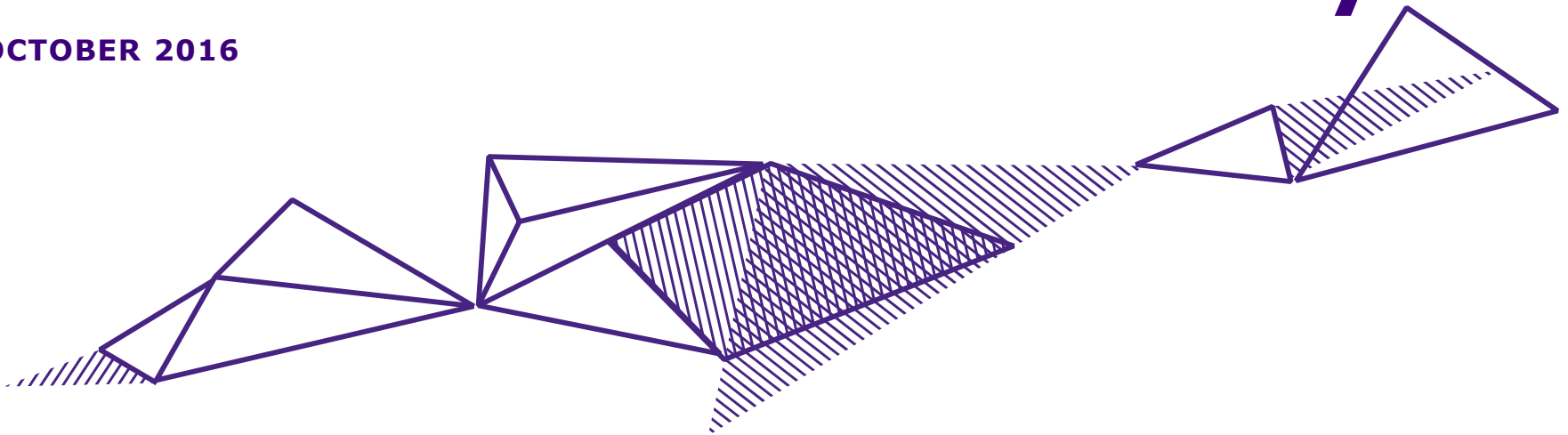


# **CRA**

## **2016 Annual Corporate Survey**

### **Business and Tax Intermediary**

OCTOBER 2016



# OBJECTIVES

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The CRA requires data on corporate-wide issues to provide public opinion context for:

- Strategic planning and reporting; and
- Tailoring of corporate communications.

Research was designed and conducted with the general public, business decision makers and tax intermediaries to gauge:

- overall perceptions of the CRA;
- experience with income tax filing;
- perceptions of contacts and dealings with the CRA
- methods of contact; and
- demographics.

# METHODOLOGY

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- 303 online surveys with business decision-makers
- 300 online surveys with tax intermediaries
- Conducted from July 15 and August 2, 2016
- This report highlights the results from the survey with business decision-makers and tax intermediaries
  - Findings from the general public survey are presented under separate cover

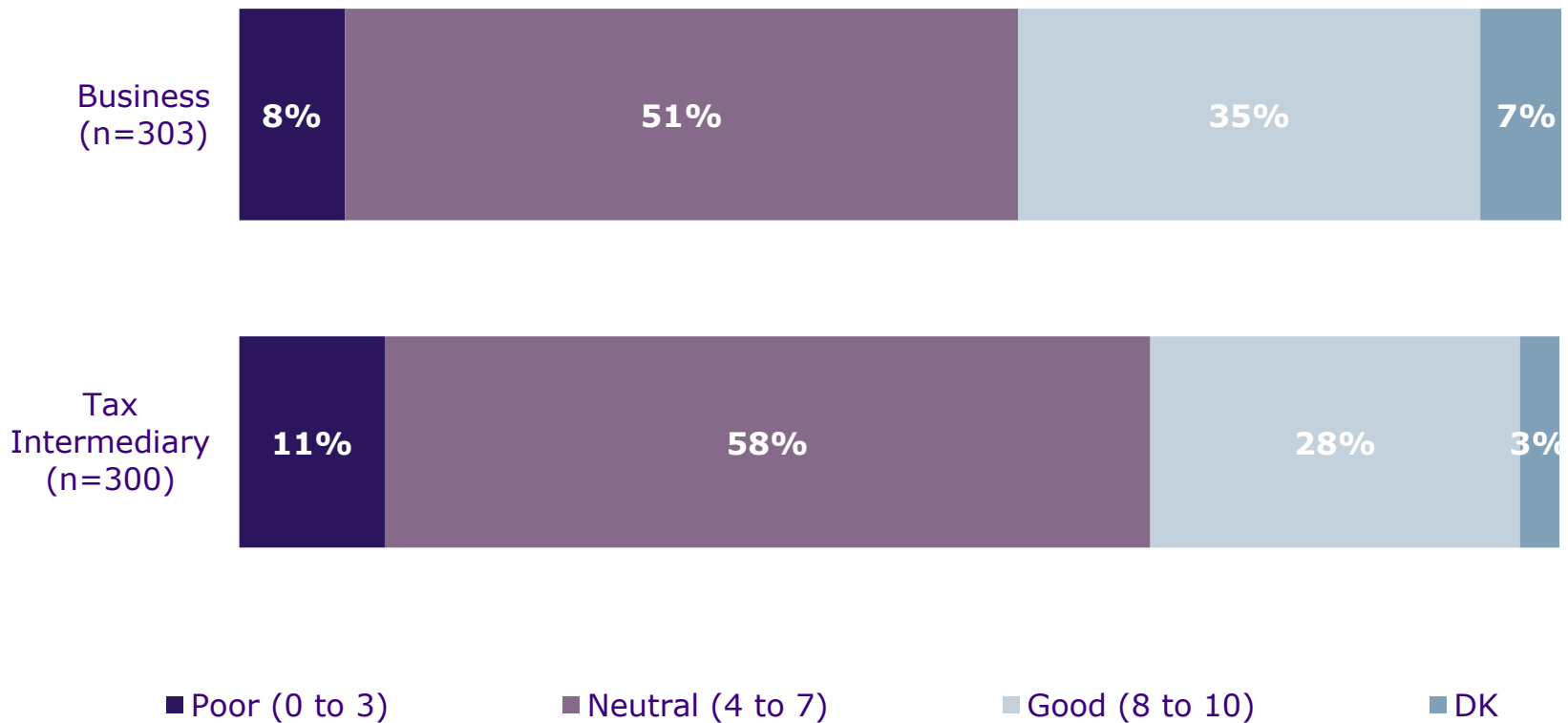


# Overall Perceptions of CRA

# OVERALL PERFORMANCE OF CRA

**QB1** How would you rate the overall performance of the CRA? Please use a scale from 0 to 10, where 0 means "terrible" and 10 means "excellent".

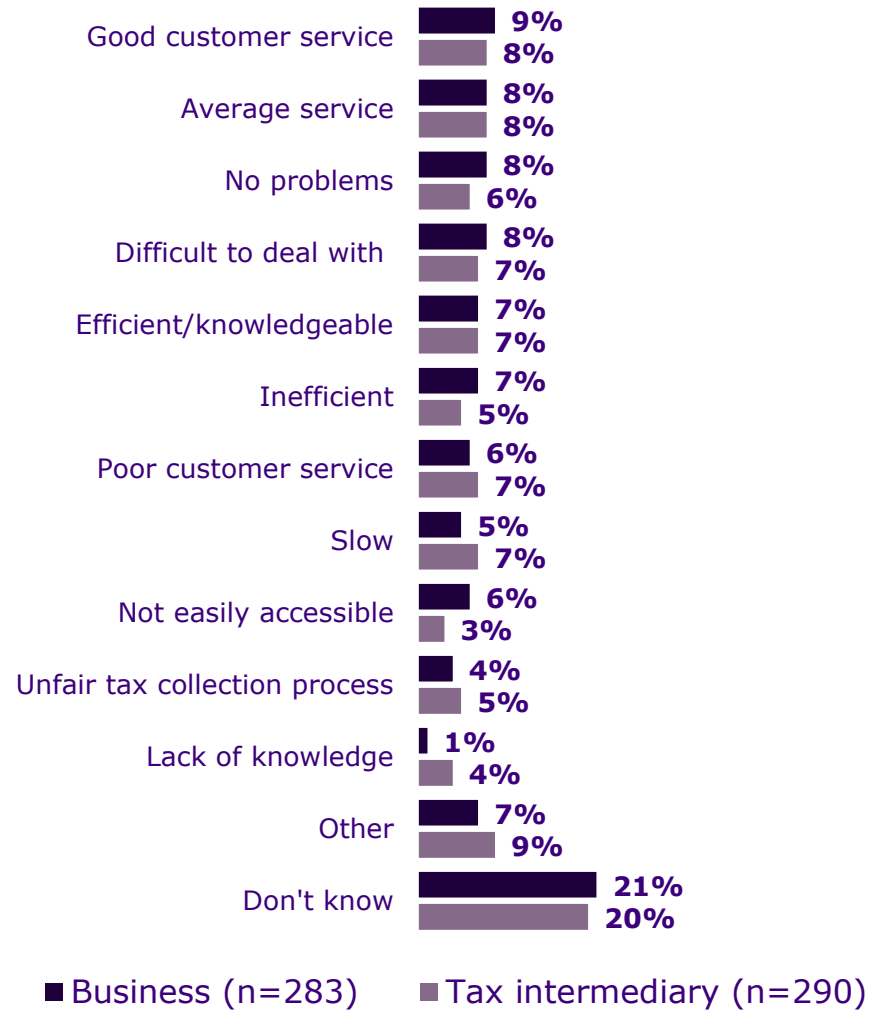
*Base: all respondents*



# REASONS FOR PERFORMANCE RATING

**QB2 Why do you rate the performance of the CRA as [INSERT RATING] out of 10?**

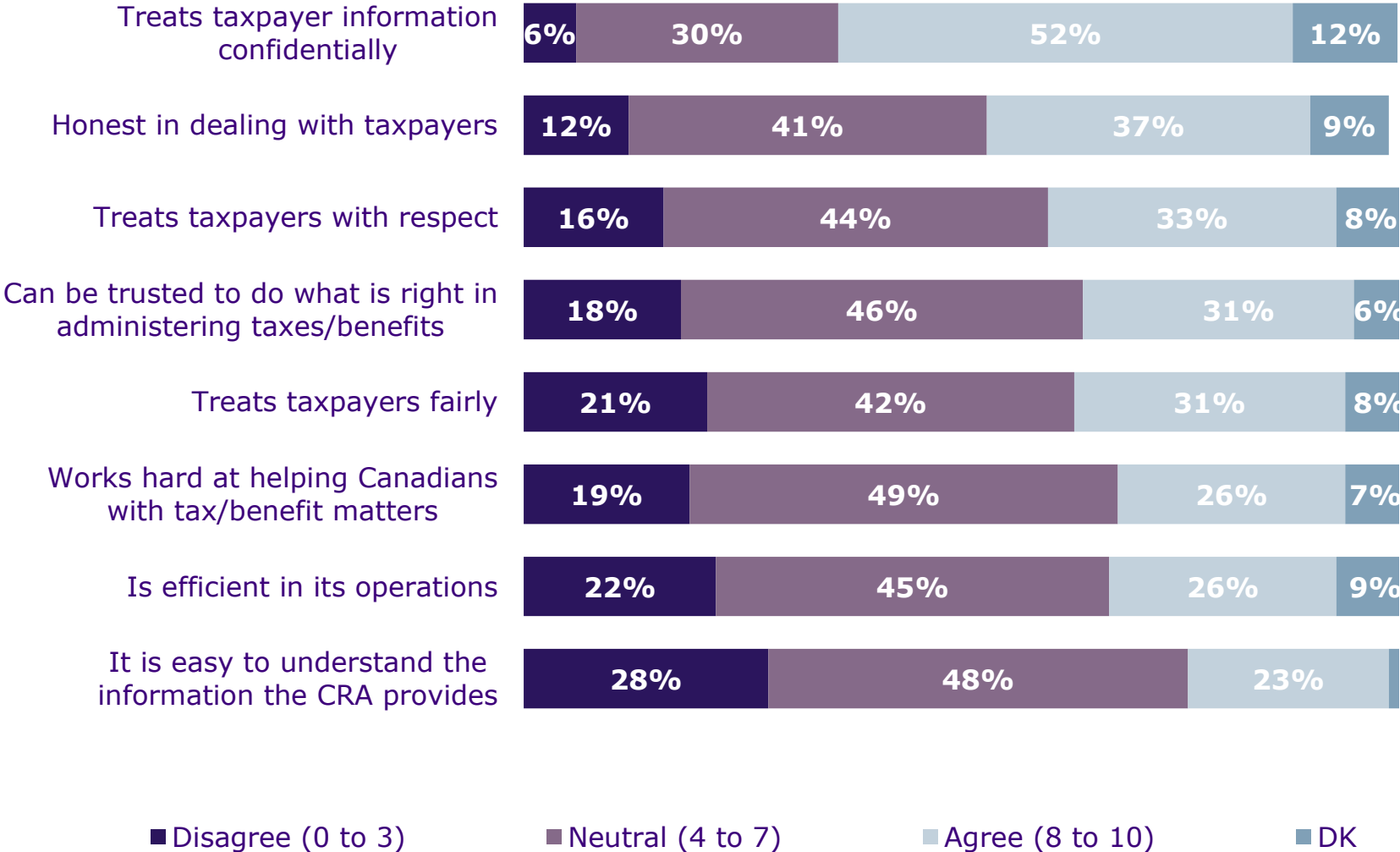
*Base: those who provided a valid response at QB1*



# AGREEMENT WITH ATTRIBUTES: BUSINESS

**QB3** I would now like you to rate the CRA on a series of statements. Please use a scale of 0 to 10, where 0 means completely disagree and 10 means completely agree.

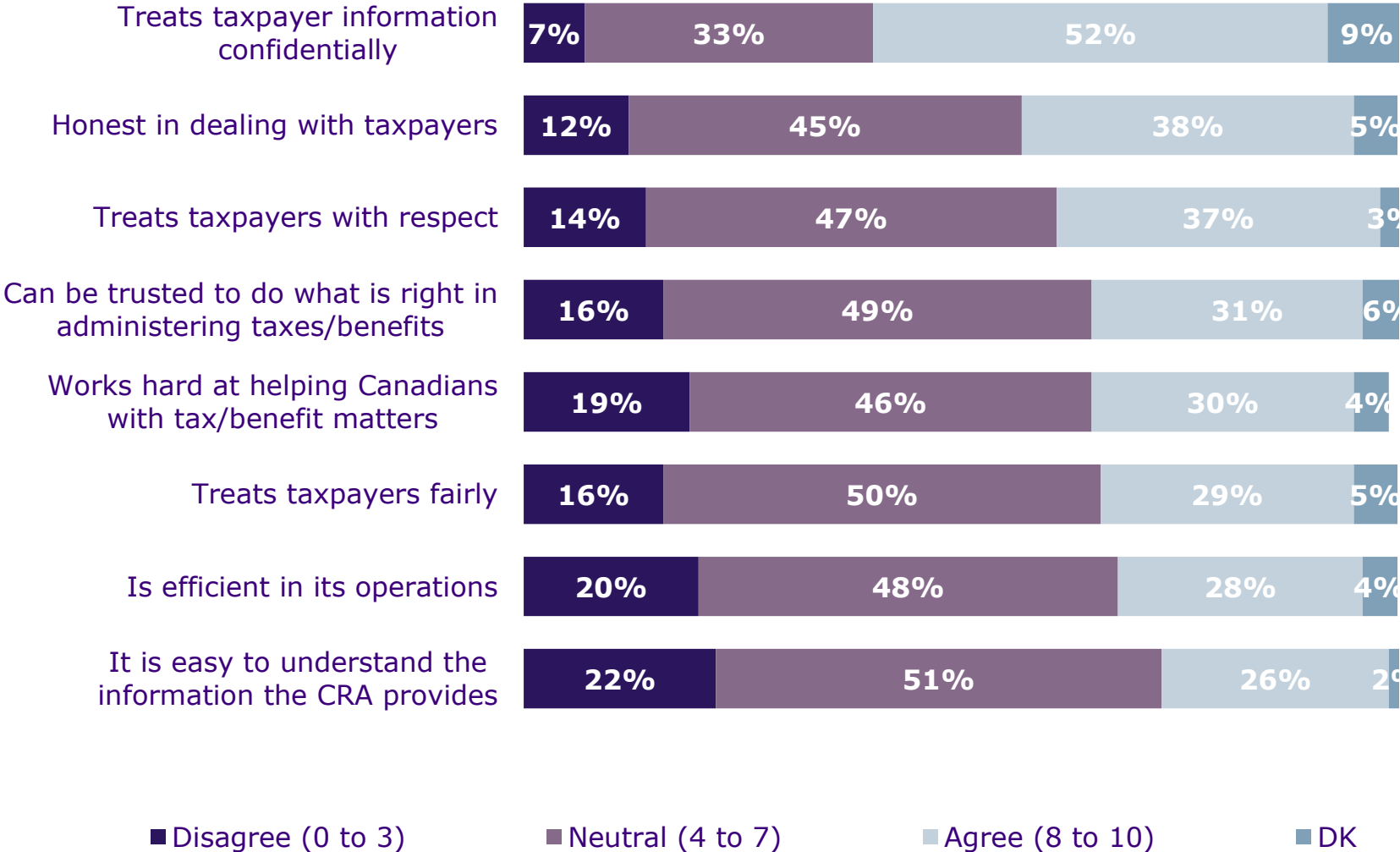
Base: all business respondents (n=303)



# AGREEMENT WITH ATTRIBUTES: INTERMEDIARY

**QB3** I would now like you to rate the CRA on a series of statements. Please use a scale of 0 to 10, where 0 means completely disagree and 10 means completely agree.

Base: all tax intermediary respondents (n=300)







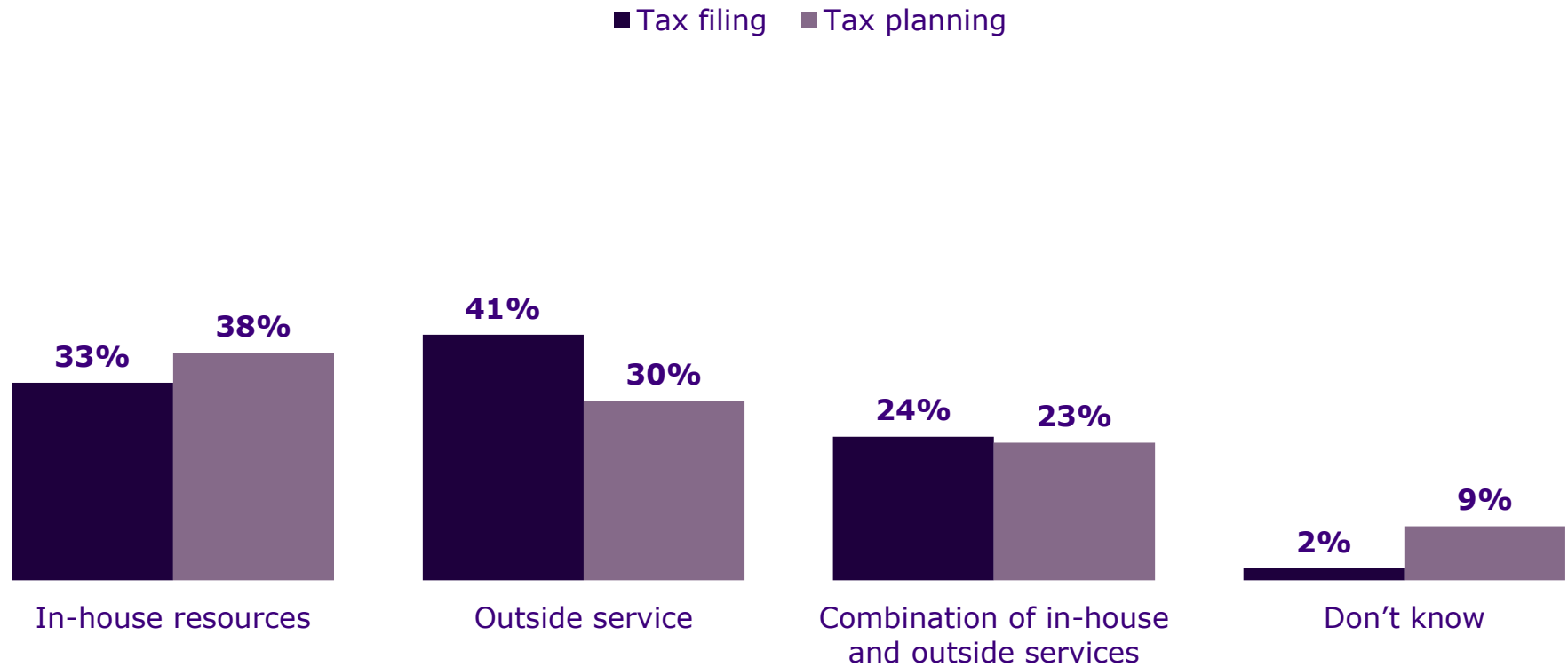
# **Income Tax Filing and Planning**

# RESOURCES USED FOR FILING AND TAX PLANNING

**QC1** When filing business income taxes, does your business use:

**QC2** And what about tax planning? Does your business use...

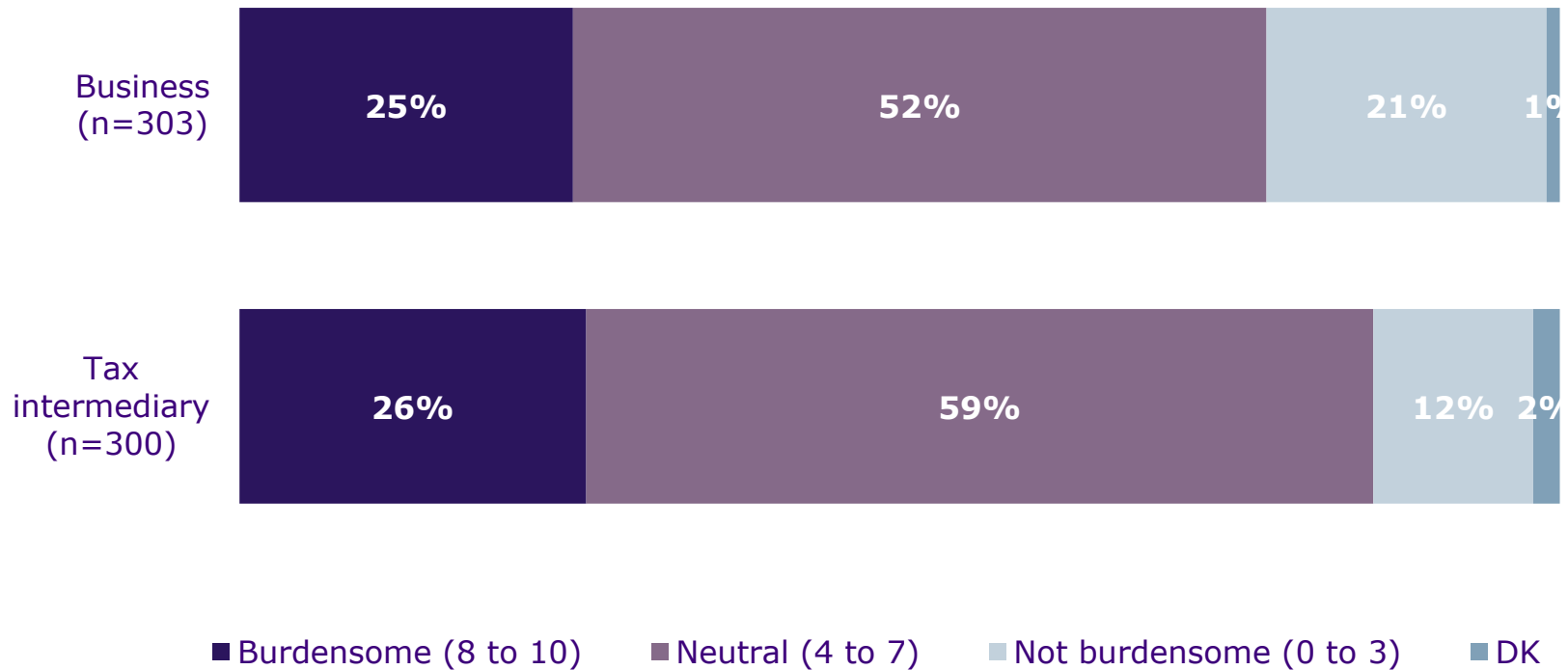
*Base: all business respondents (n=303)*



# PAPERWORK BURDEN

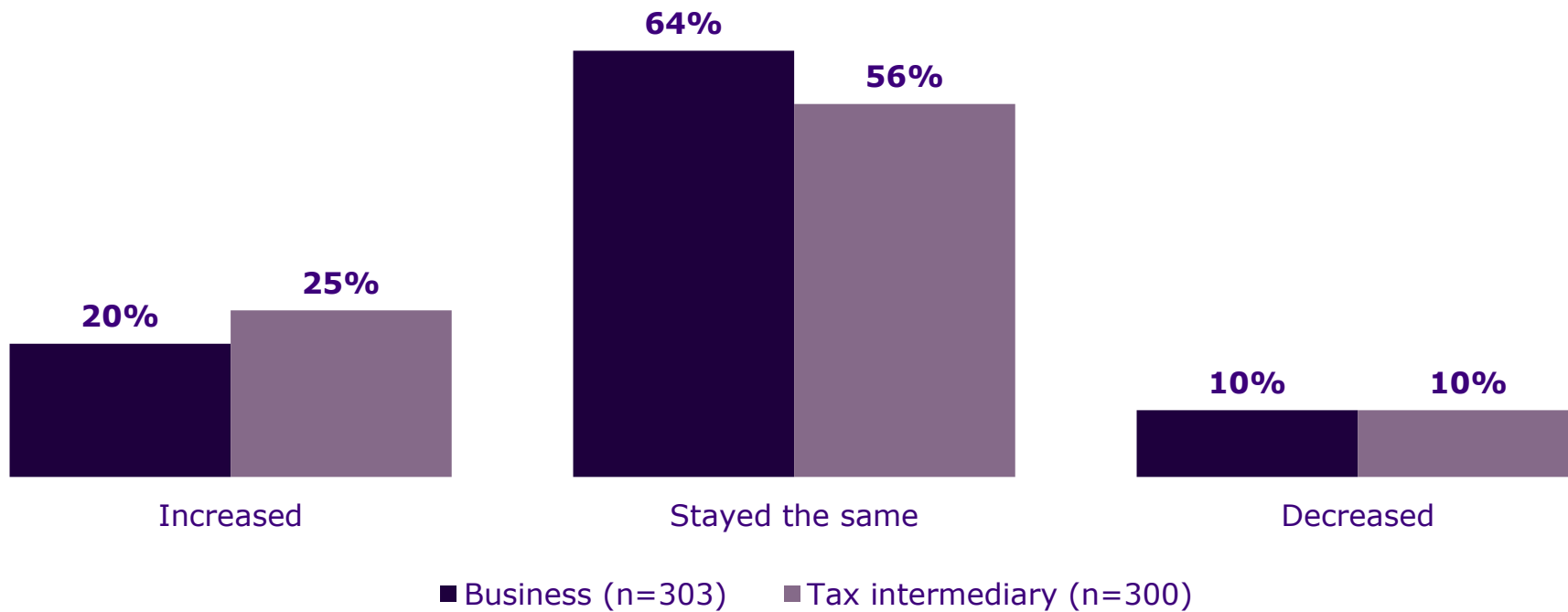
**QSM1** On a scale of 0 to 10, how burdensome for your business is paperwork for the CRA?

*Base: all respondents*



# PERCEPTION OF BURDEN OF PAPERWORK

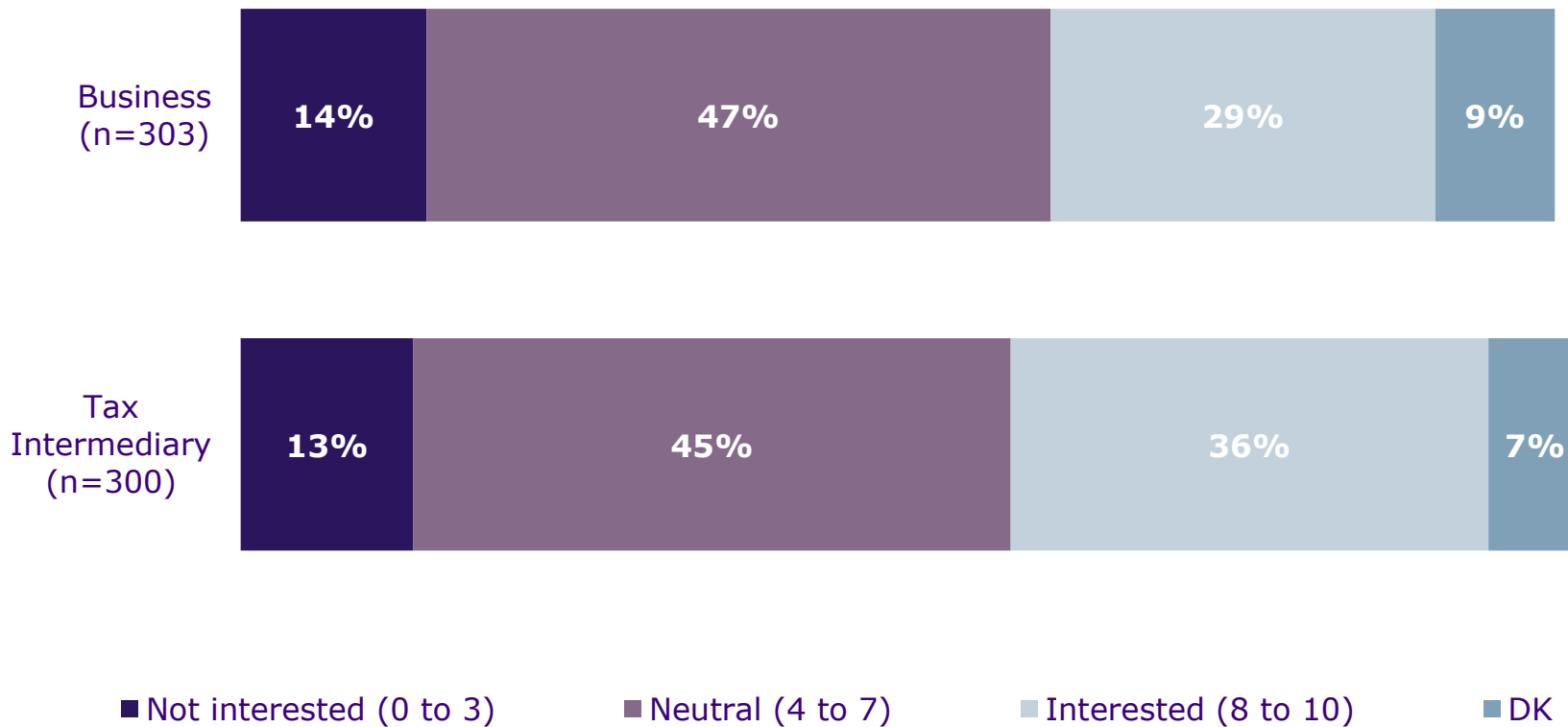
**QSM2** Over the past couple of years, do you think the burden of dealing with paperwork for the CRA has...?  
*Base: all respondents*



# INTEREST IN ONLINE TRANSACTIONS

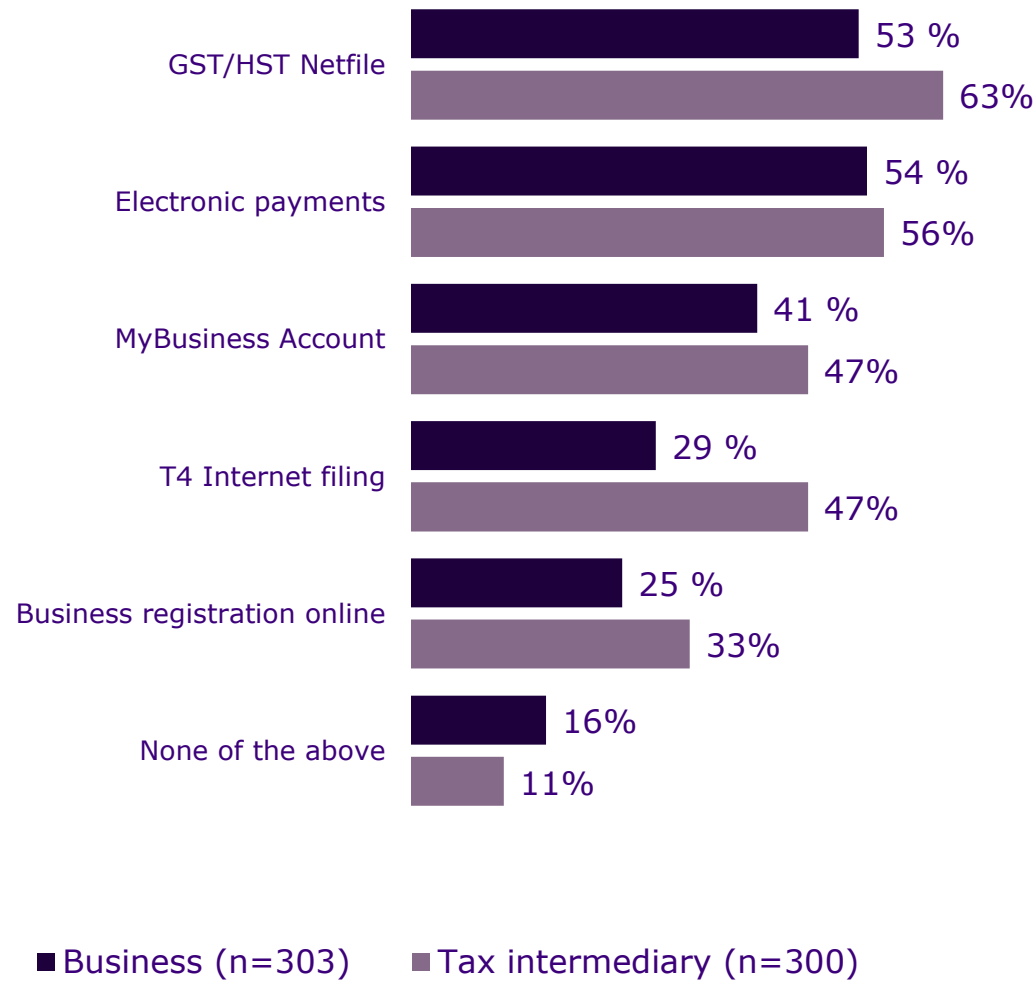
**QSM3** On a scale of 0 to 10, what is your level of interest in increased availability of online business transactions with the CRA, in order to reduce the paper burden?

*Base: all respondents*



# USE OF SERVICES IN PAST YEAR

**QSM4** Which of the following online services have you used in the past three years? *Please choose all that apply.*  
Base: all respondents





# Experience with CRA - Contacts

# CONTACTED CRA LAST 12 MONTHS AND METHOD

**QD1** In the last 12 months, have you contacted the CRA for business purposes, other than sending a business tax return?

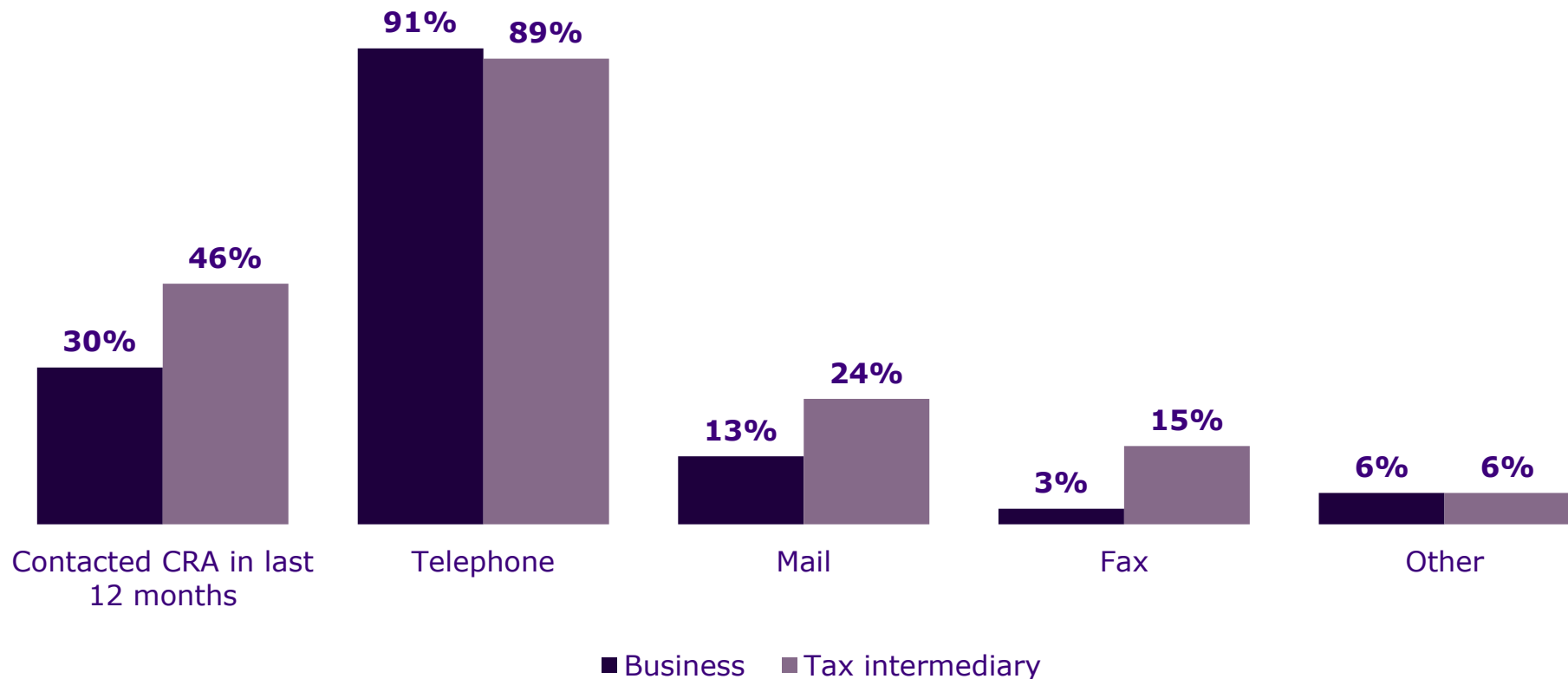
*Base: all respondents*

**QD2** How did you contact the CRA?

*SUBSAMPLE: Those who contacted the CRA in the past 12 months*

*Business: (n=90)*

*Tax intermediary: (n=139)*





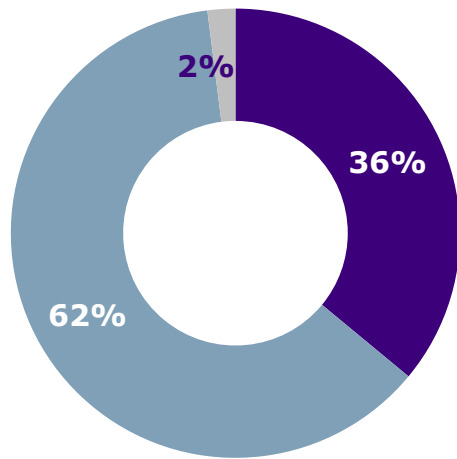
# ISSUES ENCOUNTERED CONTACTING CRA: BUSINESS

**QSM5 Did you have any problems accessing the CRA during your most recent contact? (n=86)**

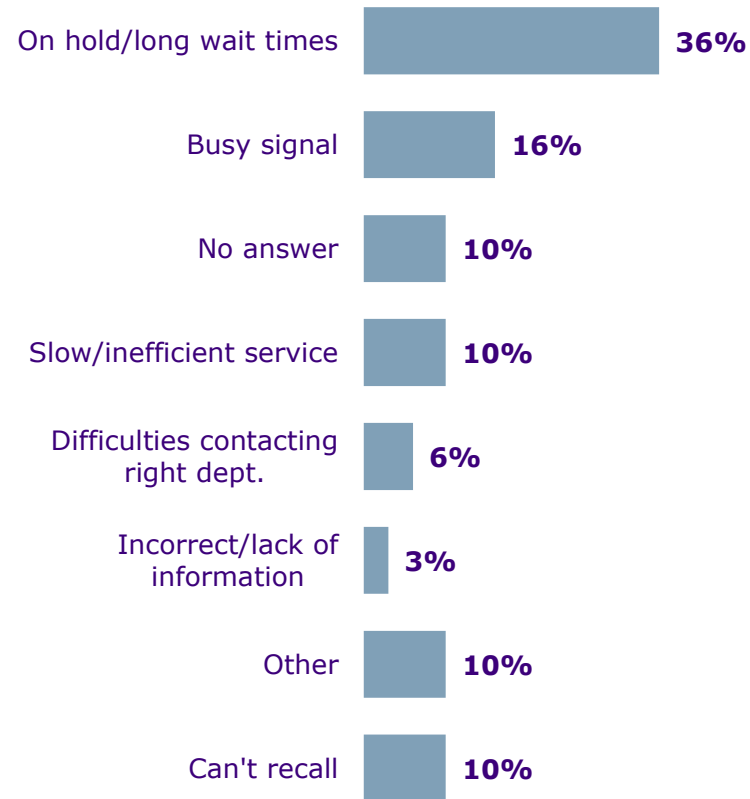
*SUBSAMPLE: Those who contacted the CRA in the past 12 months*

**QSM6 What problem did you encounter? (n=31)**

*SUBSAMPLE: Those who experienced an issue*



- Yes
- No
- Don't know



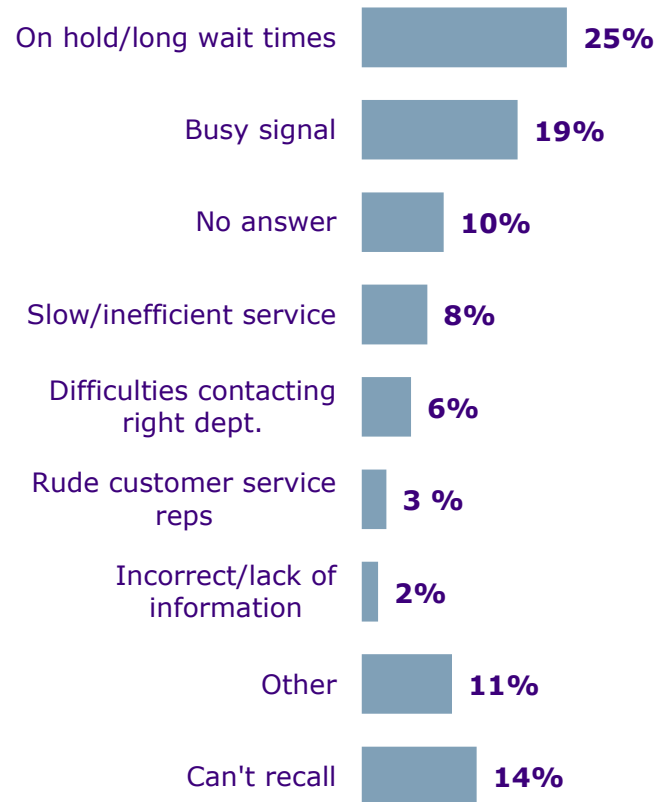
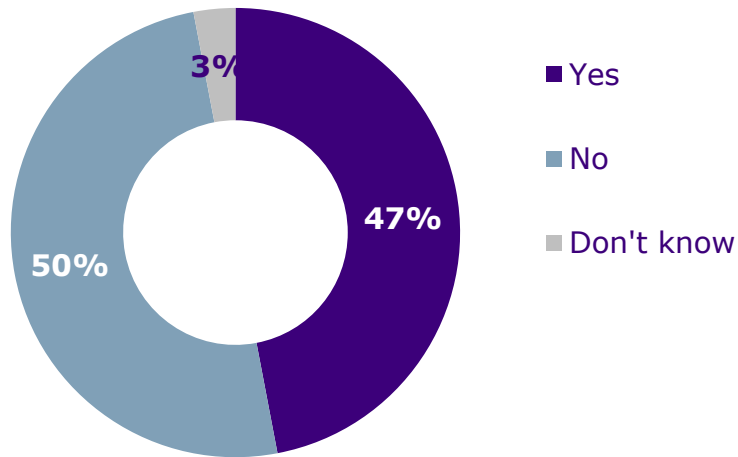
# ISSUES ENCOUNTERED CONTACTING CRA: INTERMEDIARY

**QSM5 Did you have any problems accessing the CRA during your most recent contact? (n=133)**

*SUBSAMPLE: Those who contacted the CRA in the past 12 months*

**QSM6 What problem did you encounter? (n=63)**

*SUBSAMPLE: Those who experienced an issue*



# PURPOSE OF MOST RECENT CONTACT

## QD4 Was the purpose of your MOST RECENT contact to...?

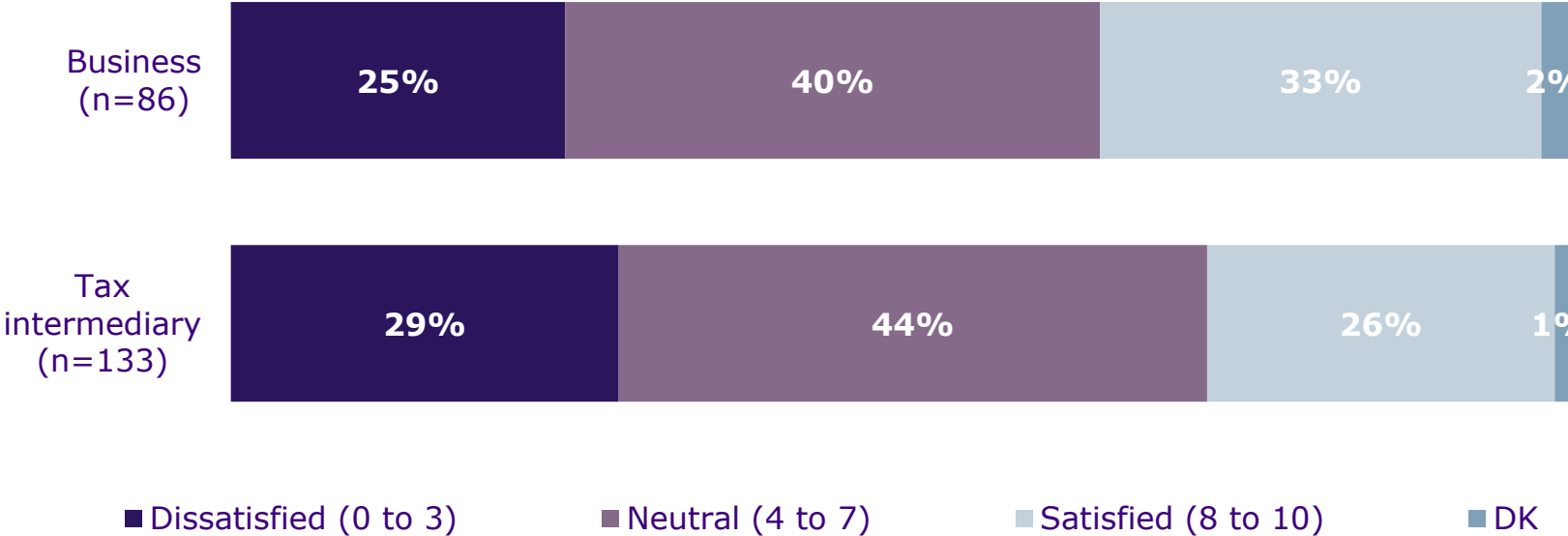
SUBSAMPLE: Those who contacted the CRA in the past 12 months



# SATISFACTION WITH TIME TO OBTAIN SERVICE

**QSM7** And how satisfied are you with the amount of time it took to get service during this most recent contact with CRA?

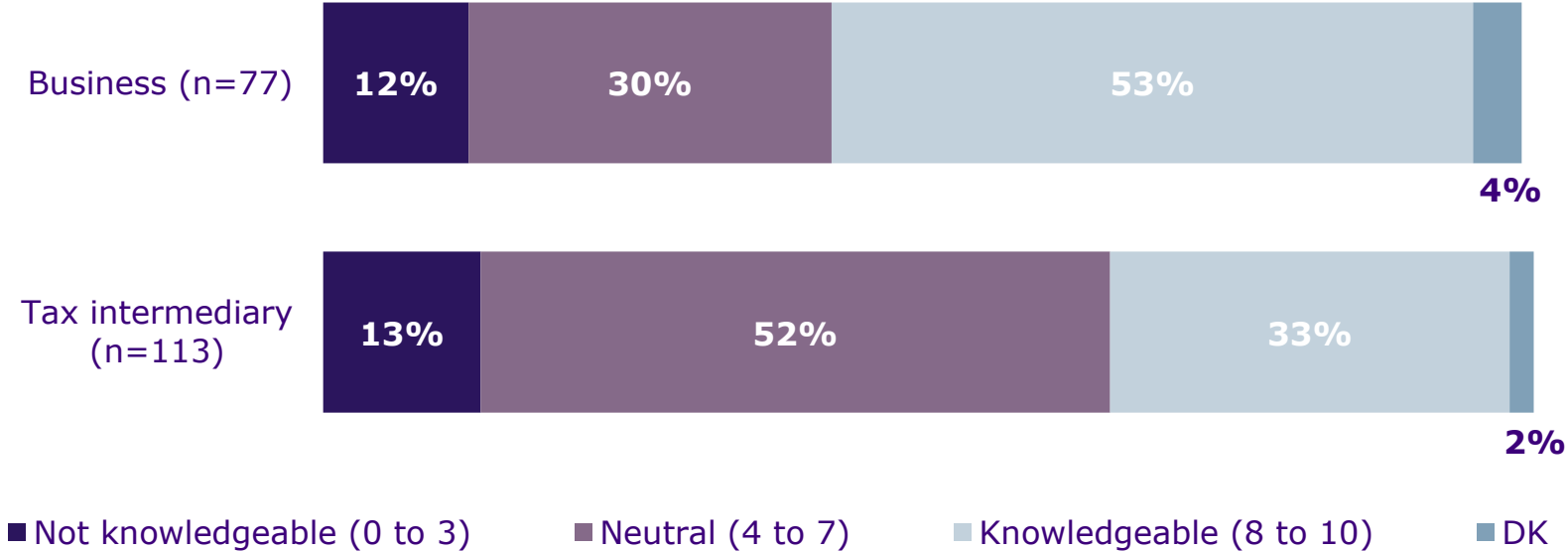
*SUBSAMPLE: Those who contacted the CRA in the past 12 months*



# KNOWLEDGE OF STAFF: PHONE

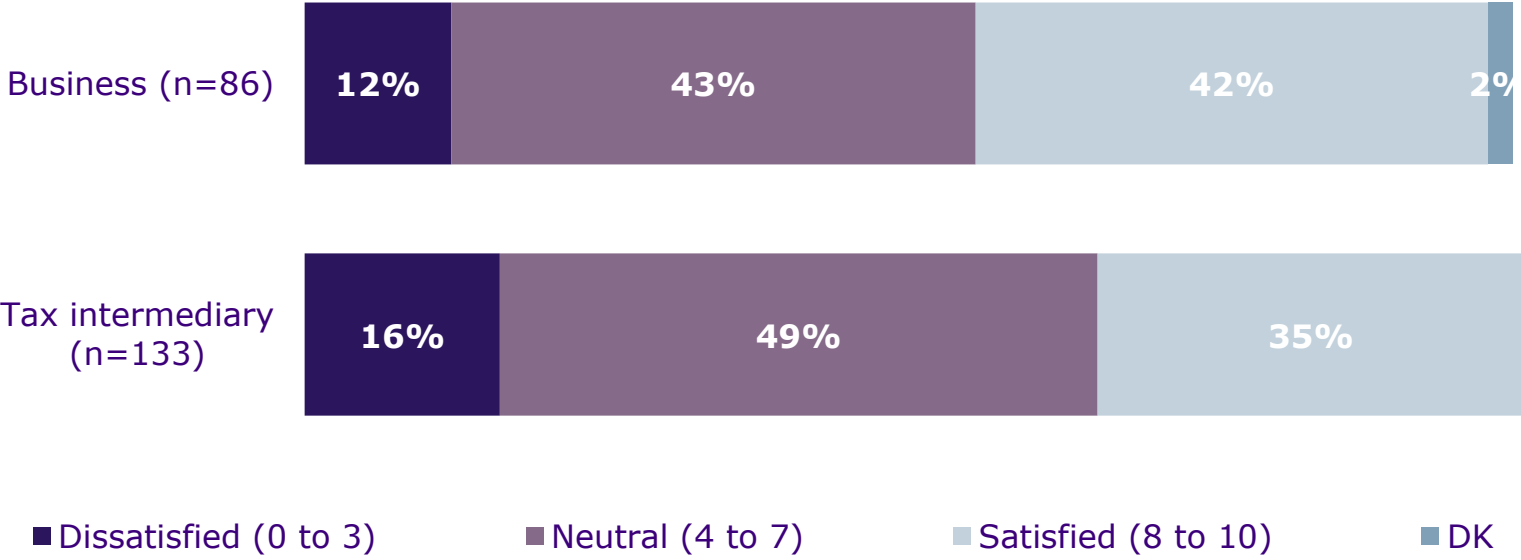
**QSM8** For the following question we are asking for your impression of the service you received from the CRA (on a scale of 0 to 10) during this most recent contact.

*SUBSAMPLE: Those who contacted the CRA in the past 12 months by telephone*



# QUALITY OF SERVICE

**QD5** On a scale of 0 to 10, how satisfied are you with the overall quality of the service you received when you contacted the CRA (Insert response from d3, or from d2 if d3 wasn't asked) on this most recent occasion?  
*SUBSAMPLE: Those who contacted the CRA in the past 12 months*

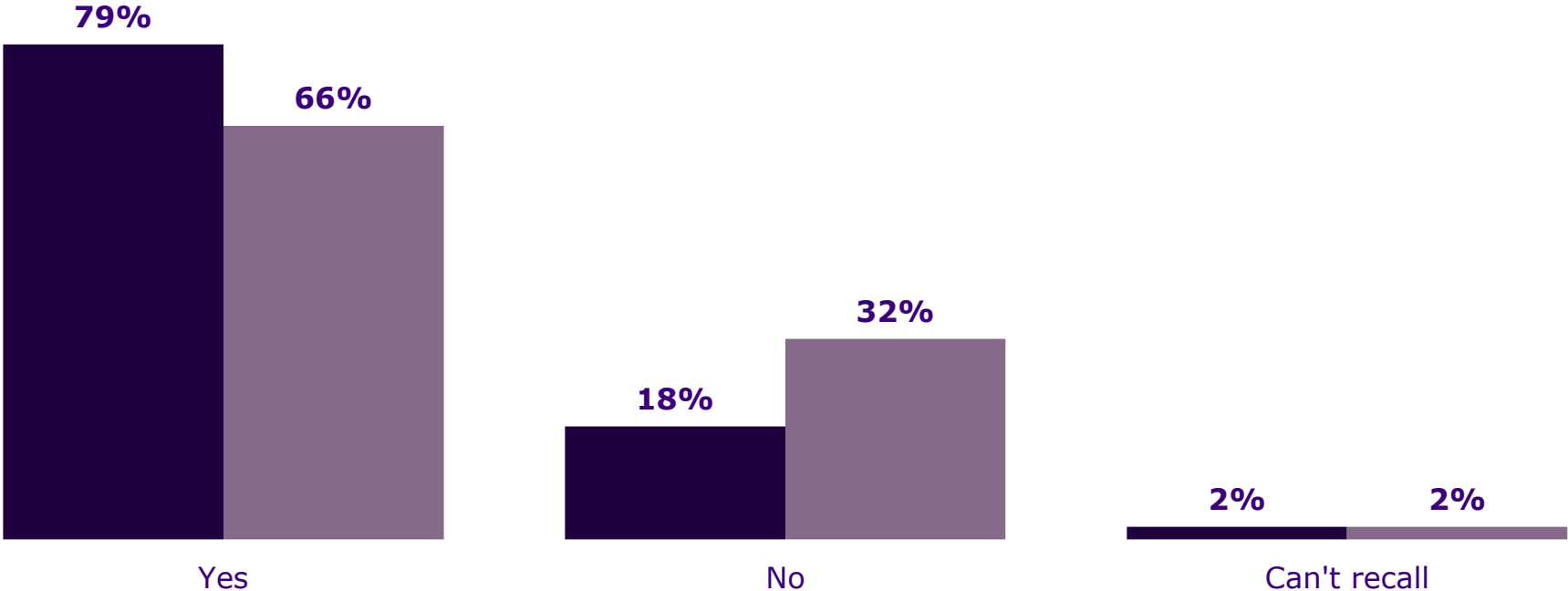


# RECEIVED WHAT THEY NEEDED

**QD6 Did you get what you needed from the CRA on this particular occasion?**

*SUBSAMPLE: Those who contacted the CRA in the past 12 months*

■ Business (n=77) ■ Tax intermediary (n=113)

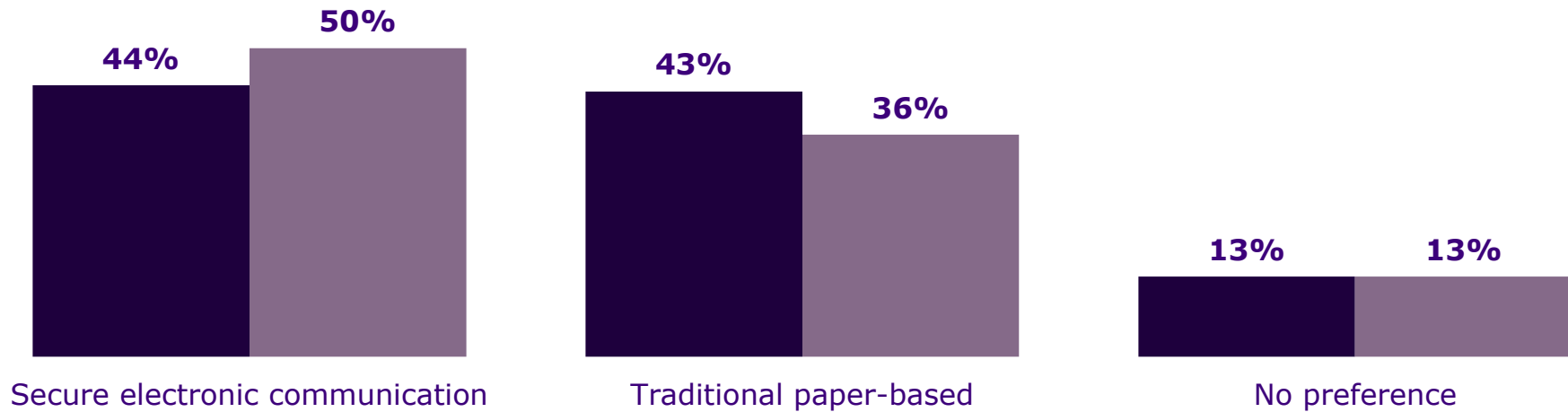


# PREFERRED METHOD FOR RECEIVING INFORMATION

**QSM9** What about communications from the CRA to you? Would you prefer traditional paper-based communications, such as a letter in the mail, or an email indicating you have CRA correspondence within My Account, CRA's secure online portal?

Base: all respondents

■ Business (n=303)   ■ Tax intermediary (n=300)

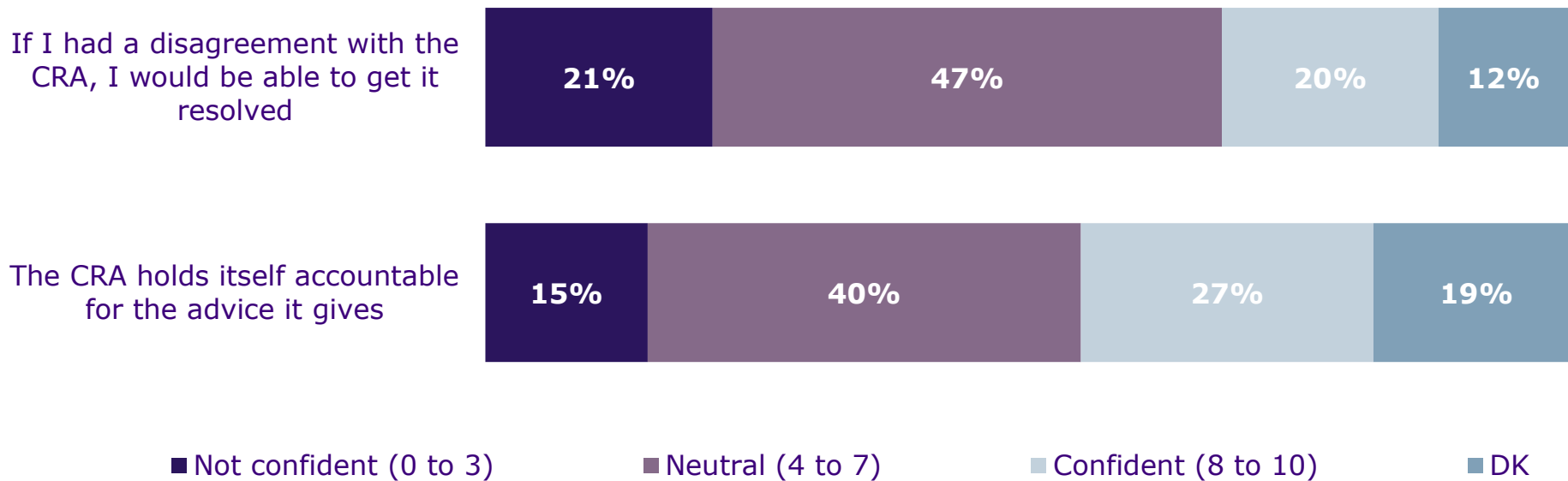




# CONFIDENCE IN CRA TO RESOLVE ISSUES: BUSINESS

**QSM10 Please state your level of confidence in the CRA in regards to the following statements:**

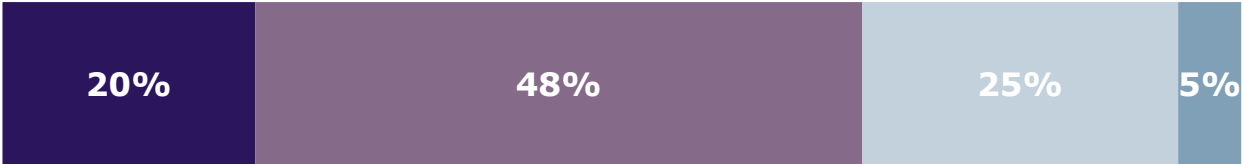
*Base: all business respondents (n=303)*



# CONFIDENCE IN CRA TO RESOLVE ISSUES: INTERMEDIARY

QSM10 Please state your level of confidence in the CRA in regards to the following statements:  
Base: all respondents (n=300)

If I had a disagreement with the CRA, I would be able to get it resolved



The CRA holds itself accountable for the advice it gives



■ Not confident (0 to 3)      ■ Neutral (4 to 7)      ■ Confident (8 to 10)      ■ DK

# HOW WOULD CORRECT ERROR IN BUSINESS TAXES

QSM11 If you wanted to fix an error in business taxes, what would you do?

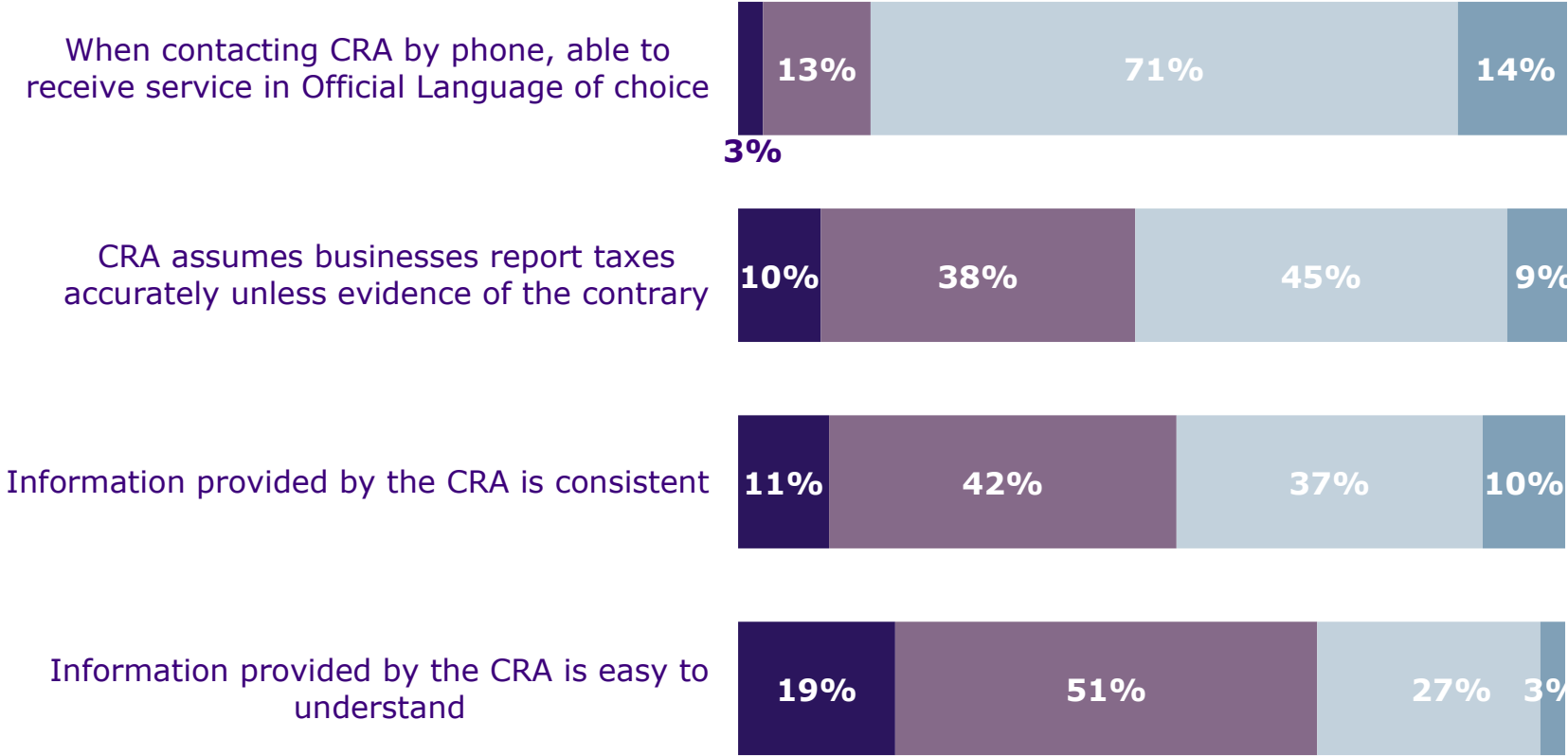
Base: all respondents



# AGREEMENT WITH STATEMENTS: BUSINESS

QSM12I would now like to read you a list of statements. For each one, please use a scale from 0 to 10, where 0 means you completely disagree, and 10 means you completely agree.

Base: all business respondents (n=303)

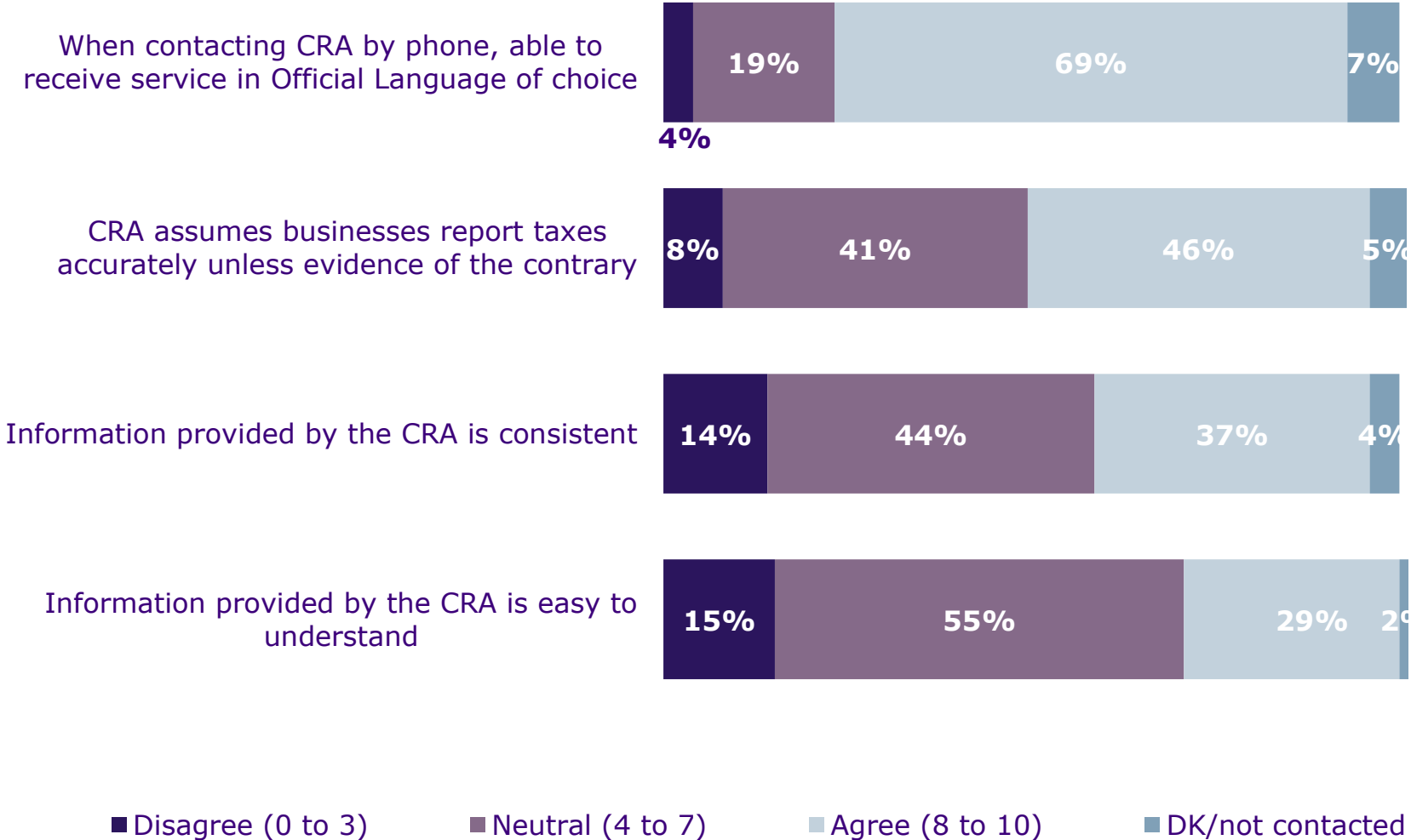


■ Disagree (0 to 3)    ■ Neutral (4 to 7)    ■ Agree (8 to 10)    ■ DK/not contacted CRA

# AGREEMENT WITH STATEMENTS: INTERMEDIARY

QSM12I would now like to read you a list of statements. For each one, please use a scale from 0 to 10, where 0 means you completely disagree, and 10 means you completely agree.

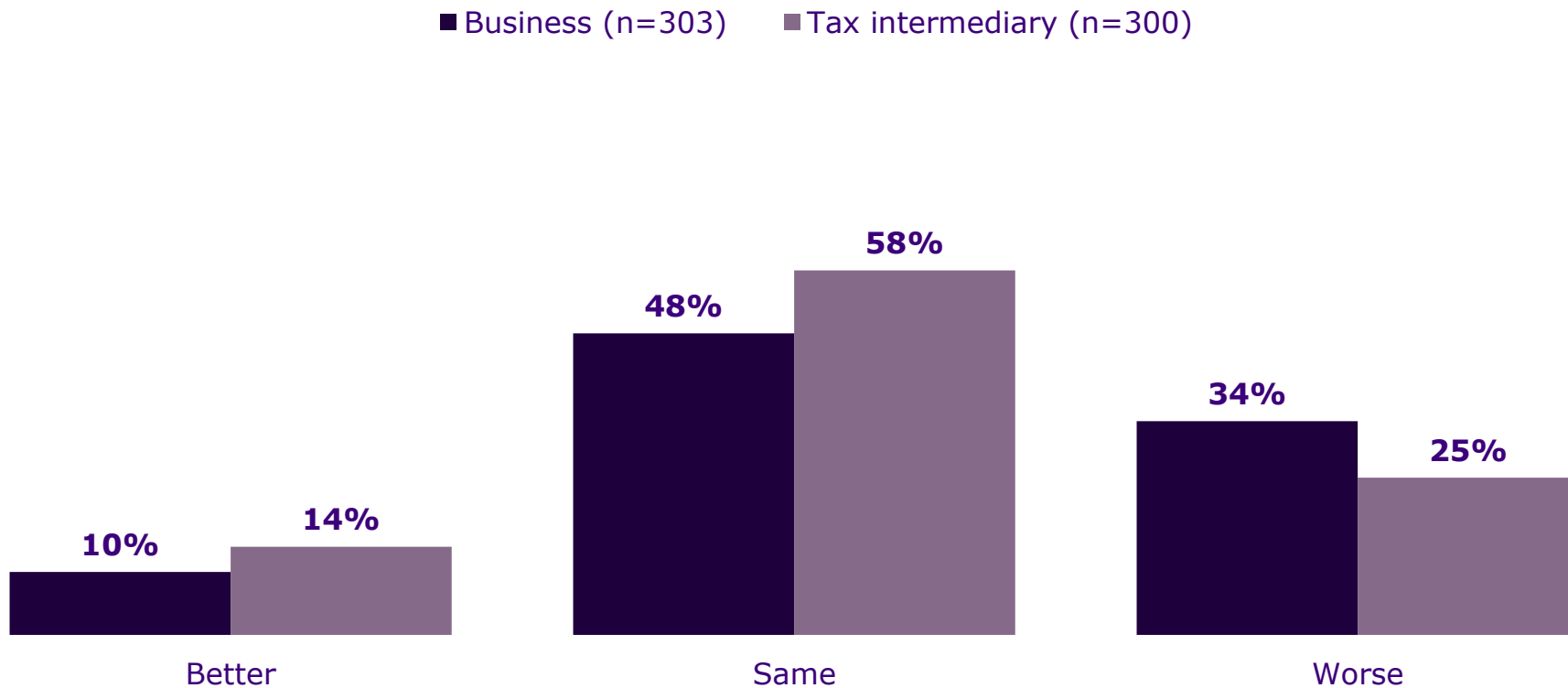
Base: all intermediary respondents (n=300)



# SERVICE COMPARISON: FINANCIAL INSTITUTIONS

**QD6** Based on your experience, would you say the level of customer service provided by the CRA is better, about the same, or worse than the service you might receive from financial institutions with which you currently do business.

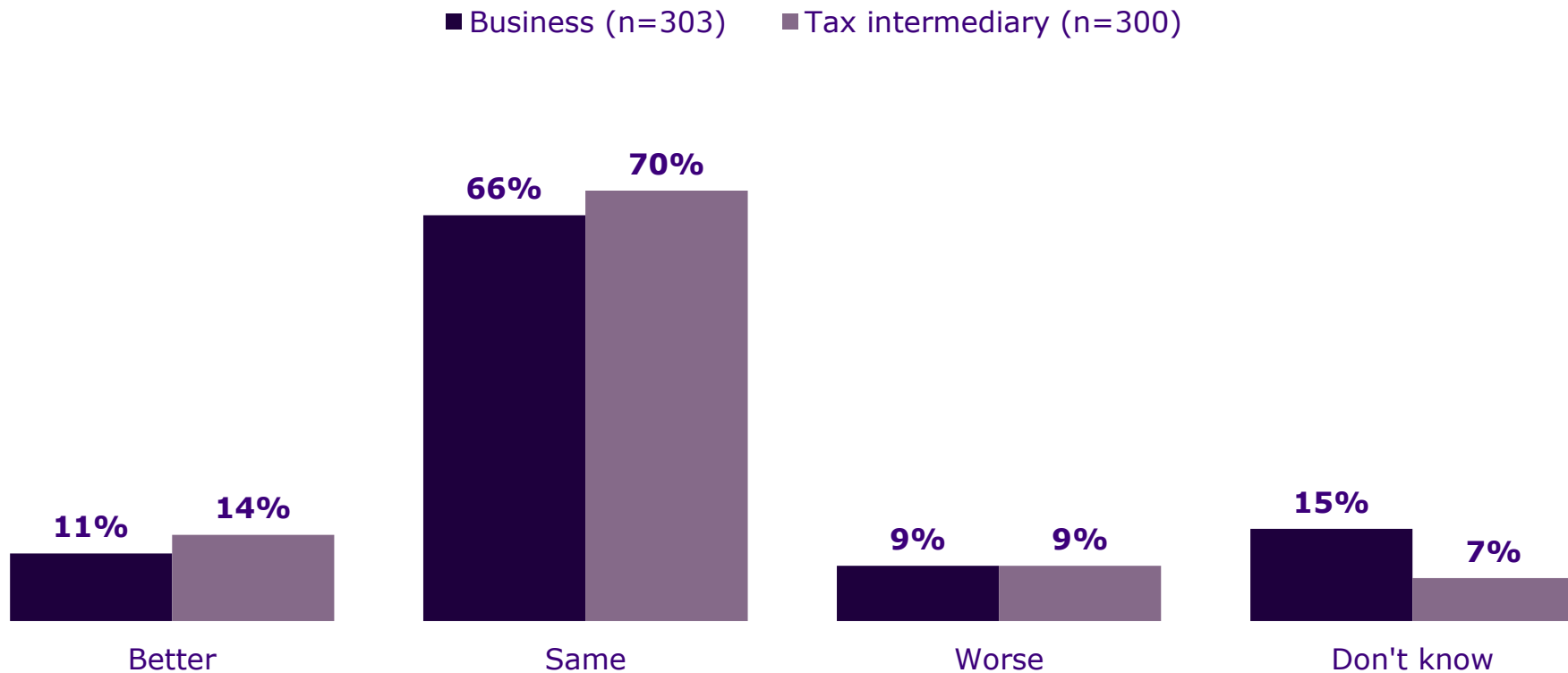
*Base: all respondents*



# SERVICE COMPARISON: GOVERNMENT AGENCIES

**QD6** Based on your experience, would you say the level of customer service provided by the CRA is better, about the same, or worse than the service you might receive from other federal government agencies and departments you have dealt with.

*Base: all respondents*

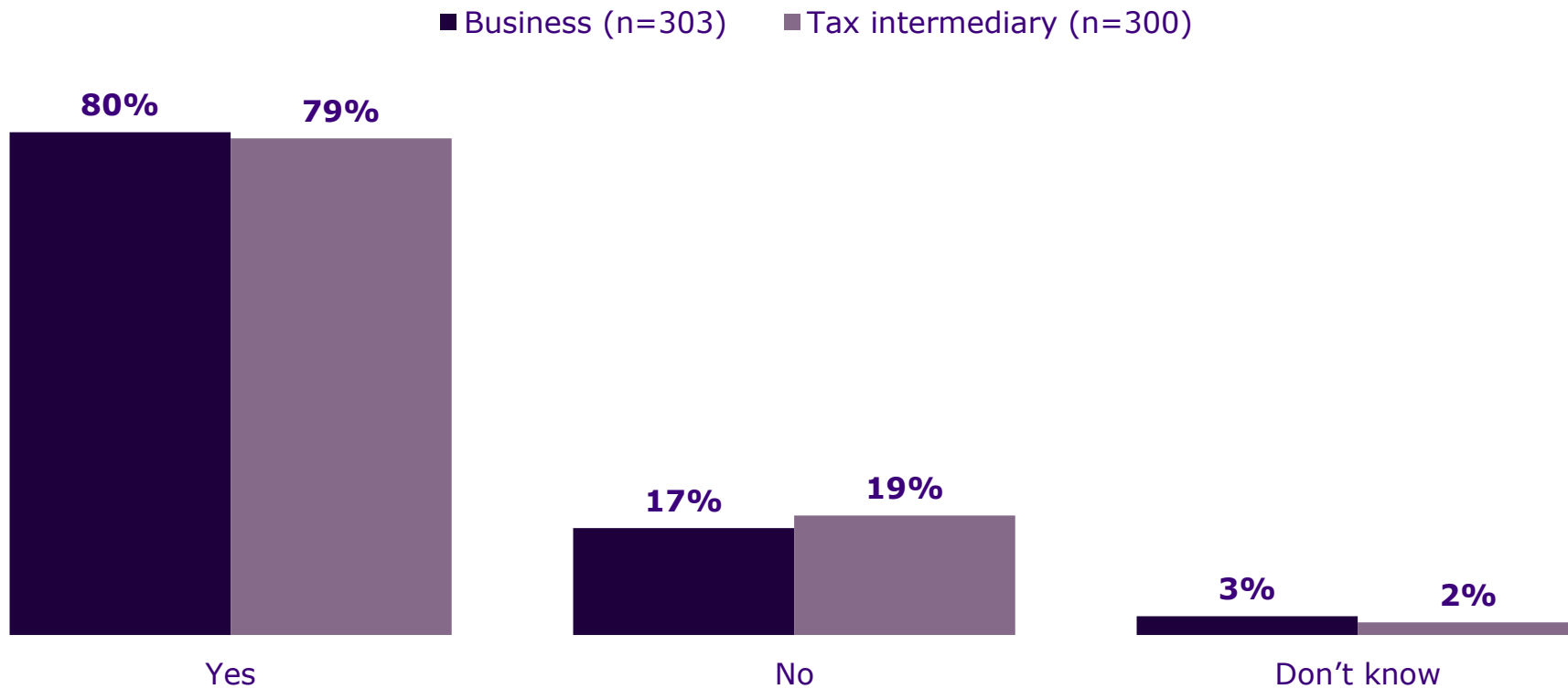


# CRA Website



# VISITED THE CRA WEBSITE

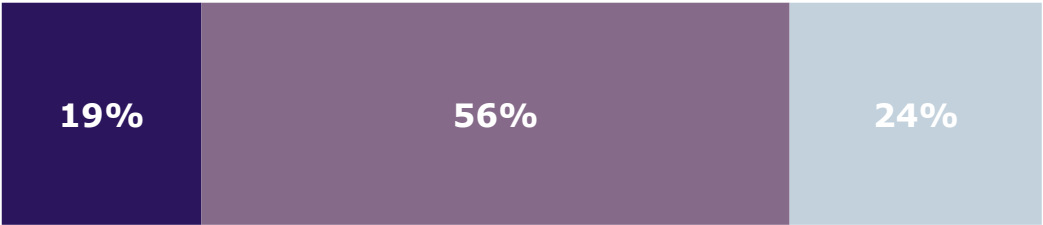
**QF1** Have you ever visited the CRA website to search for information on tax-related matters?  
*Base: all respondents*



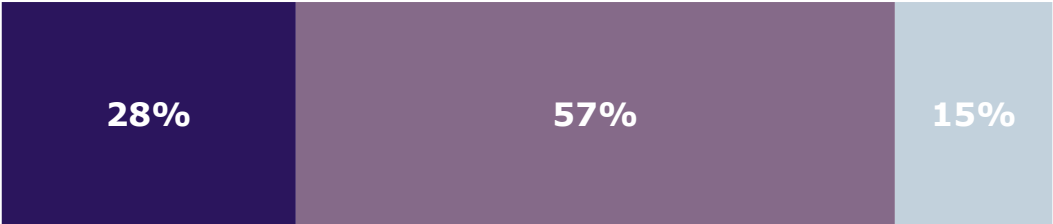
# AGREEMENT WITH STATEMENTS: BUSINESS

**QE2** Please state your level of agreement with the following statements about the CRA website. (n=241)  
*SUBSAMPLE: Those who have visited the website (n=241)*

The information provided on the CRA website is easy to understand



It is easy to find the information I'm looking for

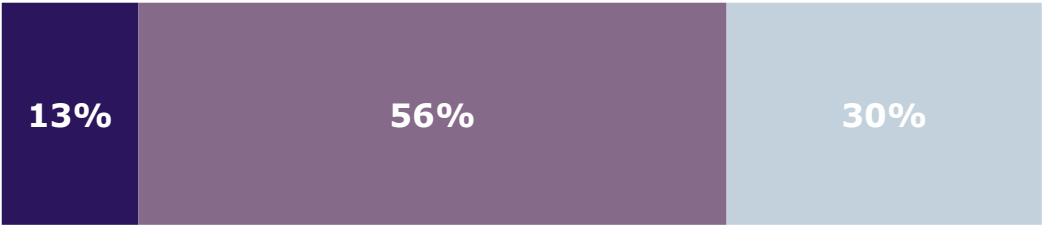


■ Disagree (0 to 3)      ■ Neutral (4 to 7)      ■ Agree (8 to 10)

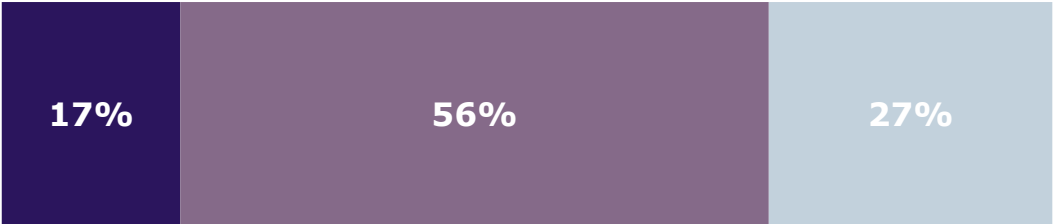
# AGREEMENT WITH STATEMENTS: INTERMEDIARY

**QE2** Please state your level of agreement with the following statements about the CRA website. (n=237)  
*SUBSAMPLE: Those who have visited the website (n=237)*

The information provided on the CRA website is easy to understand



It is easy to find the information I'm looking for



■ Disagree (0 to 3)      ■ Neutral (4 to 7)      ■ Agree (8 to 10)

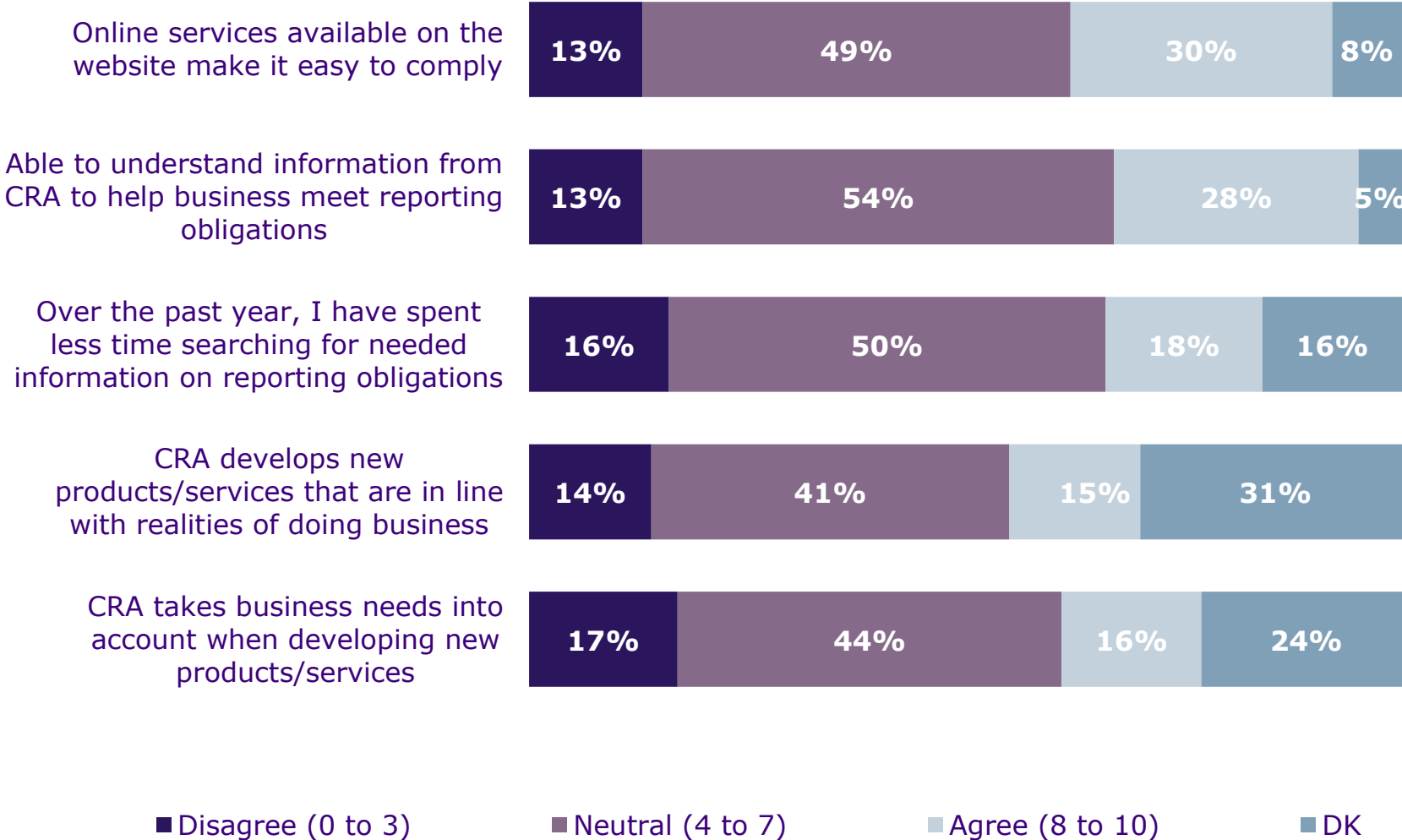


# Compliance Burden

# AGREEMENT WITH ATTRIBUTES: BUSINESS

**QF1** “Red tape” is defined as the unnecessary and undue compliance burden – that is, the time and resources spent by business to demonstrate compliance with the federal government regulations. The CRA has focused recent efforts on reducing tax-related burden for businesses. With respect to your business, please indicate the extent to which you agree with the following statements...

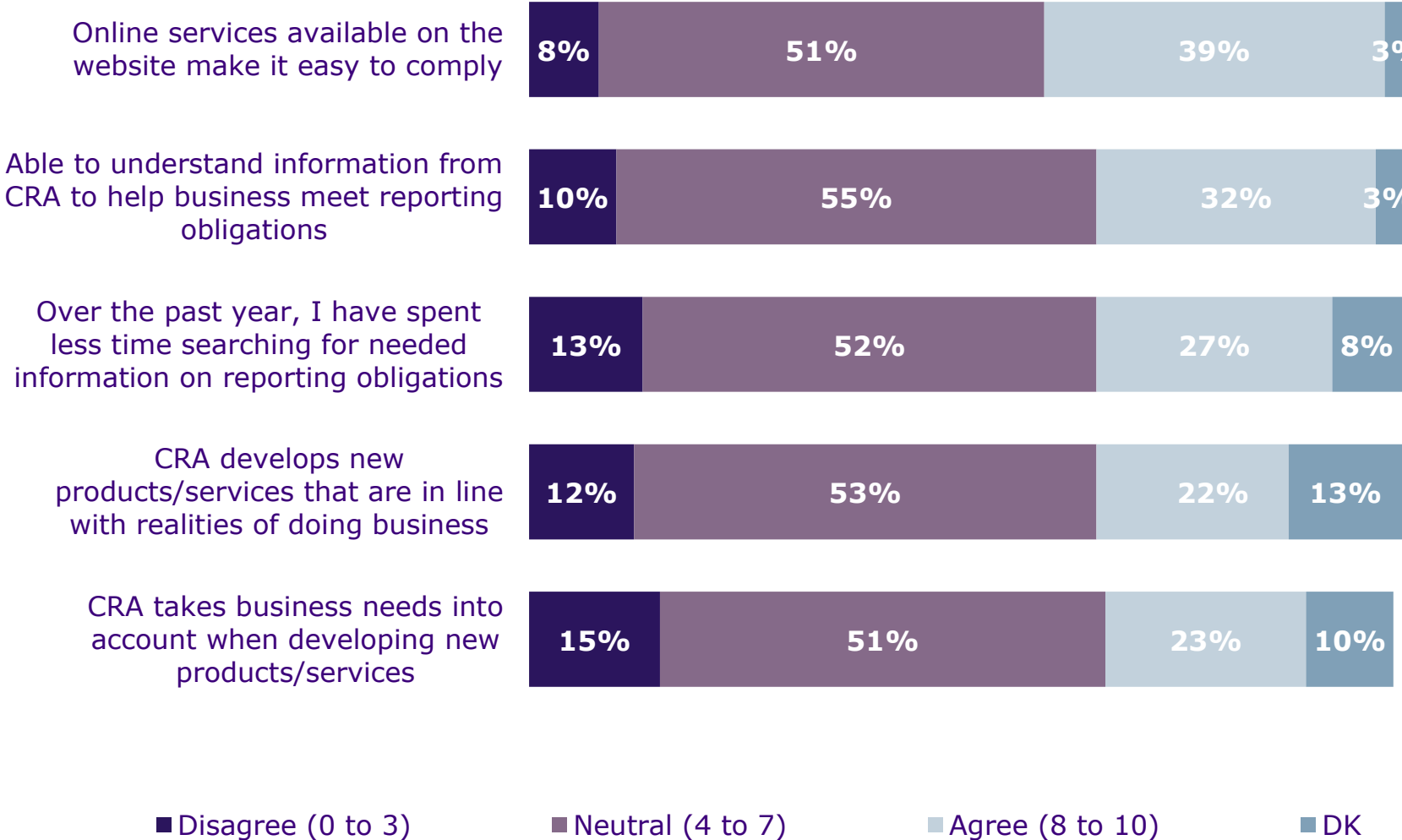
*Base: all business respondents (n=303)*



# AGREEMENT WITH ATTRIBUTES: INTERMEDIARY

**QF1** “Red tape” is defined as the unnecessary and undue compliance burden – that is, the time and resources spent by business to demonstrate compliance with the federal government regulations. The CRA has focused recent efforts on reducing tax-related burden for businesses. With respect to your business, please indicate the extent to which you agree with the following statements...

*Base: all intermediary respondents (n=300)*





**FOR FURTHER INFORMATION OR QUESTIONS CONTACT:**



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VICE PRESIDENT, CORPORATE AND  
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