



Canada Revenue
Agency

Agence du revenu
du Canada

Canada Revenue Agency Call Centre Service Expectations

Executive Summary



Prepared for the Canada Revenue Agency

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Canada

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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 that reads "Tanya Whitehead". The signature is written in a cursive, flowing style.

Tanya Whitehead
Kantar TNS
Senior Director & Public Sector Practice Lead