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Canada Child Benefit Program: 2020-2021 Satisfaction Survey

Executive Summary

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Canada 

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March 2021

This is a summary of results of a telephone survey conducted by The Strategic Counsel on behalf of Canada Revenue Agency. The research study was conducted with 1,150 Canada child benefit (CCB) recipients between February 22 and March 9, 2021.

Cette publication est aussi disponible en français sous le titre: **Programme de l'Allocation canadienne pour enfants : 2020-2021 Sondage sur la satisfaction - Sommaire.**

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Executive Summary

A. Background and Objectives

Since 2000, the Canada Revenue Agency (CRA) has been continuously conducting studies to gauge client awareness and satisfaction with the Canada child benefit (CCB). The CCB is a tax-free monthly payment made to eligible families to help them with the cost of raising a child under 18 years of age. In 2019-2020, 3.4 million families and 5.9 million children were entitled to receive the CCB, with \$24.5 billion dollars paid out.

Over the years, the survey has transitioned between different methodologies as outlined below.

- The initial telephone survey of first-time Canada Child Tax Benefit (CCTB, now CCB) applicants was conducted in 2000. Additional telephone surveys of GST/HST clients, and regular recipients of the CCB were added in 2005 and 2006 respectively.
- In 2014, both CCB surveys (first-time and regular recipients) were moved to an online environment and clients were mailed invitations with a URL address to access the surveys. The GST/HST credit survey remained a telephone survey.
- In 2016, the GST/HST credit survey was conducted both via telephone and online. The rationale for keeping this survey available via telephone was based on the number of respondents who indicated they did not have access to the Internet (e.g., seniors).
- In 2018, The Strategic Counsel conducted a CCB survey of first-time applicants, reverting to a telephone methodology only. Given the availability of telephone numbers for first-time applicants and the ability to take a more targeted approach, it was decided that a telephone methodology remained the most appropriate and efficient way of obtaining feedback from clients. Additionally, the number of respondents from the sample in previous years was proving to be too small for the results to be deemed statistically valid.
- In 2020 and 2021, the CCB survey was again conducted solely by telephone. This survey remained consistent across the years and targeted all current recipients of the CCB, including both first-time and long-time recipients.

CRA continues to recognize the value in collecting recipients' feedback, in order to provide the Benefit Programs Directorate (BPD) team with useful data. The main objectives of the survey are to gauge satisfaction with the overall CCB experience, as well as various stages and/or components, and to evaluate specific aspects of the delivery of the program. In 2021, the research also tracked progress against the results of the previous year's survey with a view to understanding if CCB recipients' perceptions have changed over time, and why.

The findings support CRA's continuous service improvement initiatives and will provide the BPD with a better understanding of benefit and credit clients and direction to improve programs, services and communications. The data will also be used to populate results against a 'client satisfaction' indicator included in CRA performance reports.

B. Methodology

Consistent with the approach taken in 2020, the 2021 survey was conducted by telephone. This methodology was deemed to be the most appropriate and efficient way of obtaining feedback from recipients and allowed for year-over-year tracking.

The CRA provided The Strategic Counsel with a list of 25,000 CCB recipients. The list was generated by the CRA using the following probability-based sampling process, allowing each respondent within each of the two target groups (e.g., first-time and long-time recipients) to have an equal opportunity to participate in the survey.

- From the full CCB data base of 3.4 million CCB recipients, CRA pulled all those meeting the criteria for long-time and first-time recipients.
- This subset of the full database was then sorted into the specific subgroups (first-time and long-time recipients).
- To provide a sample frame of approximately 25,000 long-time and first-time CCB recipients, CRA drew approximately 13,750 long-time recipient contacts and 11,250 first-time recipients.
- Within each of the subgroups a random sort was undertaken (from a list alphabetically ordered by last name) to draw every 'nth' recipient to generate the required sample frame. For example, if the initial pull generated a list of 47,000 first-time recipients, approximately every 4th contact would be pulled in order to generate the list of 11,250.

The primary list provided by CRA was further scrubbed by the Strategic Counsel to remove any duplicates and identify incomplete contact listings. The list was then separated into two contact lists based on the length of time the recipient had been receiving payments. The first included 10,854 first-time recipients, defined as those who had received their first CCB payment within the last 12 months, and the second included a list of 13,649 long-time recipients (e.g., those in receipt of the CCB for more than 12 months). Each list included contact information such as the recipient's name and phone number(s) which was used only for the purposes of contacting the individual, as well as key demographic and regional information to be used as analytical variables. A further sort was performed to ascertain the distribution of recipients by region. A computer-generated randomization of the list was undertaken using the =RAND function in Excel and the formula $f=n/N$ was used to draw a simple random sample of the contacts to be surveyed. As the sample was depleted, the approach was repeated as necessary to obtain the final target n.

In total, The Strategic Counsel completed surveys with 1,150 CCB recipients across Canada (500 first-time recipients and 650 long-time recipients). In accordance with the original sample provided, soft quotas were established to ensure the final sample closely aligned to regional proportions reflected in the sample provided by CRA. Otherwise, no additional quotas were set. The telephone survey was conducted between February 22 and March 9, 2021. The survey was intended to be no more than 10 minutes in length and the average duration was 9 minutes. In accordance with Government of Canada public opinion research (POR) accessibility requirements, an alternative PDF format of the survey was offered. However, no requests were made for this alternative format.

The above noted probability-based sampling protocol means that the final sample has an associated margin of error of 2.82% at a 95% confidence interval. However, because the original sample provided by CRA was a subset of the universe of CCB recipients, the results cannot be extrapolated to the total population of those receiving the CCB. Rather, the results are representative of first-time and long-time recipients only.

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

C. Key Findings

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

CRA continues to receive high ratings of satisfaction on CCB services, both in terms of the experience overall for recipients, and across specific service areas, processes and attributes.

The table below summarizes the 'net' satisfaction scores in all areas for which this was measured, showing both the total (all recipients) for 2020 and 2021, and the break-out for first-time and long-time recipients for the most recent survey results. The 'net' satisfaction score combines the percentage of respondents who gave a rating of 'very' or 'somewhat satisfied' on the measure being assessed.

Note that the specific service area or attribute being rated may not apply to all respondents. As per the asterisks included throughout the table, only those who had contacted the CRA about CCB services in the last 12 months were asked to assess their satisfaction on certain attributes including how quickly their issue was resolved or the accuracy of the response they received. Similarly, only those who had contacted the CRA by telephone regarding CCB services were asked to rate their level of satisfaction with aspects of the interaction between themselves and the CRA agent.

The overall satisfaction rating, taking into account various interactions the recipient may have had with the CRA regarding the CCB, remains very strong and unchanged since 2021, with almost nine-in-ten (87%) reporting they are satisfied. Just over half (51%) of recipients offered the highest rating of ‘very satisfied’. The results on this measure in 2021 are higher for first-time recipients (91%) compared to long-time recipients (84%) suggesting that more recent applicants were more slightly more satisfied with the level and quality of service from the CRA regarding the CCB, although the overall satisfaction score is high for both groups.

Results from 2021 continue to suggest that there is still a fairly wide spread in satisfaction ratings across the key service attributes and processes which were assessed as part of this study. Ratings varied by 16-points with the highest being for the professionalism shown by the CRA agent (90%) – asked only of those who had specifically contacted CRA by telephone – and the lowest rating associated with how quickly an issue was resolved (74%) – asked only among recipients who had contacted CRA about CCB services in the last 12 months. This was also the only area which received satisfaction ratings below the threshold of 80 percent (which is often set as the goal for many client or customer satisfaction programs). Across all service aspects or areas listed below, satisfaction scores did not vary significantly between first-time and long-time recipients in 2021.

The 2021 results for ‘net satisfaction’, both overall and on specific service areas are consistent with those obtained in 2020, with very minimal changes in the scores year-over-year.

Net satisfaction with CCB services and key service attributes

Key Service Attribute	2020	2021	2021	2021
	TOTAL	TOTAL	First-time recipients	Long-time recipients
	%	%	%	%
Professionalism shown by the CRA agent*	90	90	92	86
Satisfaction with the overall experience, across all interactions with CRA regarding the CCB	87	87	91	84
Time it took to receive first CCB payment**	85	86	86	-
Accuracy of response of the response received***	80	85	87	79
Safeguards in place to protect personal and business information***	85	84	87	78
Way that CRA agent resolved the issue*	77	83	83	82
Ease of understanding information on last CCB notice	80	80	80	81
Accuracy of information on CCB notices	79	80	82	78
How quickly issue was resolved***	74	74	75	73

Base sizes vary per statement.

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

** Asked only of first time respondents

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

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

In line with the findings from the 2020 survey, a relatively small percentage of those surveyed in 2021 had contacted CRA within the past year about CCB services (19% in 2021; 17% in 2020). First-time recipients (27%) remain more likely to have contacted CRA compared to long-time recipients (10%).

The reasons for contacting CRA are also relatively unchanged from 2020 with the largest proportion of recipients seeking to update their file (46%), followed by those who are dealing with an application (38%) and those addressing an issue related to issuance of payment (21%). The number of recipients who contacted CRA about a service complaint remains low (4%) and unchanged from 2020 (5%).

Telephone continues to be the primary method of contact for the vast majority of recipients who interacted with the CRA in regards to the CCB (79% in 2021; 78% in 2020), followed by online services (26% in 2021; 23% in 2020). Very few recipients contacted CRA by mail (7% in 2021; 11% in 2020). Overall, most recipients found it easy to access CCB services (62% in 2021; 65% in 2020). Nevertheless, views on ease of access did vary across service platforms: higher among those accessing CCB services online (75%) versus those interacting with CRA by telephone (58%).

3. Awareness of CCB Online Services

As noted above, many recipients contact CRA in order to update their file, and this is especially the case for first-time recipients. And, while most continue to contact CRA by telephone, results from the 2021 survey highlight an increase in awareness among recipients of the various features related to managing CCB online and updating their profile:

- Awareness is highest among recipients regarding their ability to update personal information for benefit and credit purposes through My Account (85%, up from 75% in 2020);
- While somewhat lower, awareness that recipients can pay their CCB balances owing using the CRA online My Payment service or online banking also increased year-over-year (65%, up from 60%); and
- There has also been an upward trend in awareness of the My Benefits app which allows recipients a quick view of their benefit and credit details, and their eligibility information (60%, up from 54%).

As in 2020, results show that those recipients who have interacted with CRA via their online services feel positive about the experience. As such, CRA should continue efforts to enhance awareness of its online options and encourage recipients to access CCB services online.

4. Awareness of the Need to File a Tax Return

Consistent with 2020 findings, a strong majority of recipients (88%) were aware of the need to file a tax return in order to continue receiving CCB benefits, although awareness continues to be higher among long-time recipients (91%) compared to first-time recipients (83%). In line with the previous year's survey results, relatively few were unaware of this requirement (12%).

5. Applying for CCB in the Future

A slim majority (53%) of recipients, up 4 percentage points from 2020 (49%), indicated that, in future, if they were to apply for the CCB for another child, they would do so online using the secure portal 'My Account.' First-time applicants (60%) are much more likely to cite this as their preferred method over registering at the hospital (33%). This finding, consistent with previous years' results, continues to suggest that there is some momentum among the more recent cohort of applicants, and thus possibly those who will be applying in the near future, to make better use of CRA's online platform when accessing CCB services. Again, this underscores the value for CRA in continuing to raise

awareness of the array of CCB services and information online and the ease of use of this platform both for registration as well as ongoing management of the recipient's profile and account.

Hospitals are a preferred source by about one-third (36%) of recipients, were they to apply again for the CCB for another child, although preference for this method is slightly higher among long-time recipients (38%) compared to first-time recipients (33%). This finding is perhaps not that surprising given that hospitals and/or birthing centre staff are a common referral source (31%), particularly for long-time recipients (37% vs. 24% among first-time recipients).

6. Evaluation of the Child Custody Questionnaire

From time to time, the CRA sends a questionnaire to CCB recipients requesting that they confirm or correct the information with regards to child custody arrangements. When asked if they had received this questionnaire in the last 12 months, very few (3%, n=34) recipients representing only half the amount compared to the previous year (6% n=67 in 2020) said they had. This could suggest there was less distribution of the custody questionnaire overall in the past year or simply that recall has dropped.

While the base of those who responded in the affirmative to this question is quite small, over two thirds (68%) said it was either 'somewhat' or 'very easy' to fill out the questionnaire. Only 15% indicated having some difficulty, a drop of 24 points from 2020 (39%), suggesting that some improvements to the questionnaire (such as for clarity, comprehension, length, etc.) may have been realized.

D. Conclusions

The findings from the 2021 survey of both first-time and long-time CCB recipients present a fairly positive picture in terms of their awareness of and experience with CCB services. Many continue to report high levels of satisfaction with the information and processes related to obtaining information about and maintaining their CCB, as well as interacting with the CRA in regards to the CCB.

That said, there are a number of areas that CRA could explore in more depth and continue to monitor. The 2021 results identify several ongoing opportunities for CRA to improve the experience of CCB recipients, recognizing that, on the whole, most are rating CRA quite positively on its current performance:

- While recipients primarily access CCB services by telephone, there are **continued opportunities to encourage clients to shift to the online platform**, especially given the significant difference in the perceived experience of those using online services compared to telephone – the former is viewed as easier to access relative to the latter. There has been a marked increase in awareness of the range of features available online and CRA should build upon this success to further enhance awareness among recipients in general, but targeting first-time recipients in particular. Moreover, awareness of the My Benefits CRA web-based app could be higher, so a particular marketing effort focused primarily on highlighting this app would be useful. The survey did not assess clients' media consumption patterns. But large proportions did indicate that they first heard about the CCB via friends or family members. A marketing strategy which is heavily focused on social media (i.e., Facebook, Twitter, etc.) could continue to leverage and amplify 'word-of-mouth' referrals to the online platform.
- At the same time, the survey underscores that contact with the CRA about CCB services is predominantly undertaken over the phone, notably more so by first-time recipients relative to long-time recipients. Thus, **continuing to improve telephone service remains critical**. In this regard, more work needs to be done to determine what would help to make interactions by phone easier, as well as what clients' expectations are in terms of how quickly issues should be resolved.

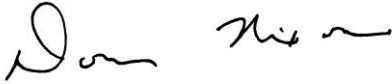
MORE INFORMATION

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To obtain more information on this study, please e-mail media.relations@cra-arc.gc.ca

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Signed:  _____