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Canada Child Benefit Program: 2021-22 Satisfaction Survey

Executive Summary

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Canada The wordmark for Canada, with a small red maple leaf icon above the letter 'a'.

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March 2022

This public opinion research report presents the 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 January 11 and 25, 2022.

Cette publication est aussi disponible en français sous le titre : **Programme de l'Allocation canadienne pour enfants : Sondage sur la satisfaction de 2021-2022.**

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Executive Summary

A. Background and Objectives

The Canada Child Benefit (CCB) is a tax-free monthly payment made to eligible Canadian families to help them with the cost of raising a child under 18 years of age. The CCB may also include the child disability benefit and any related provincial or territorial programs.

Eligible recipients for the CCB include those meeting the following criteria:

- Living with the child, and the child must be under 18 years of age.
- Primarily responsible for the care and upbringing of the child.
- A resident of Canada for tax purposes.
- They, their spouse or common-law partner must be:
 - a Canadian citizen
 - a permanent resident
 - a protected person
 - a temporary resident who has lived in Canada for the previous 18 months, and who has a valid permit in the 19th month
 - an Indigenous person who meets the definition of “Indian” under the *Indian Act*

Applications for the CCB can be completed via 3 options: Automated Benefits Application, when registering the birth of a newborn, My Account online application, and Form RC66 Canada Child Benefits Application.

The Benefits Program Directorate (BPD) of the Canada Revenue Agency (CRA) has undertaken a number of surveys over the last two decades designed to measure and track the experience of CCB recipients. Traditionally, BPD conducted three surveys in October geared towards: the CCB first-time applicant, the CCB regular recipient, and the Goods and services tax/harmonized sales tax (GST/HST) credit recipient. These surveys were used to gauge client awareness and satisfaction with program initiatives/deliverables as well as to populate results against a “client satisfaction” indicator in performance reports. In 2000, the CRA conducted its first survey of Canada Child Tax Benefit (CCTB) first-time applicants. Additional surveys were added to measure client awareness and satisfaction for GST/HST clients (2005) and regular CCTB (now CCB) recipients (2006). For all surveys prior to 2014, a letter of invitation was sent to clients asking them to participate in a telephone survey and a 1-800 number was provided. An interactive voice response (IVR) system was used, which prompted clients to respond to questions using the keypad of a touch-tone telephone. That same year, two CCTB surveys were moved to an online environment and clients were mailed invitations with a URL address to access the surveys, while 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 lower number of respondents who indicated they had access to the Internet (e.g., seniors). In 2018, the CCB survey was moved to a strictly telephone survey, because the number of respondents from the sample in previous years was proving to be too small for the results to be statistically valid. By 2019, the survey was geared more towards current recipients of the CCB, including some first-time recipients, whereas previous surveys had focused on first-time recipients only, defined as those who received their first CCB payment within the last 12 months. This survey measured satisfaction of the

overall process from application to receipt of CCB payments and served as a baseline for future assessments. This approach has been repeated since that time.

The current study supports CRA's continuous service improvement initiatives. Results are used to gauge client awareness and satisfaction with program initiatives and deliverables and to populate results against a "client satisfaction" indicator in departmental performance reports. Results are also used to inform program areas within BPD to improve programs, services and communications based on a better understanding of their benefit and credit clients.

Core objectives of the survey are to assess client satisfaction with various stages and components of the process, including specific aspects of program delivery and service, as defined by the program area.

B. Methodology

Consistent with the approach taken over the last several years, the 2022 survey was conducted by telephone. This methodology was deemed to be the most appropriate and efficient way of obtaining feedback from recipients and allows for year-over-year tracking.

The CRA provided The Strategic Counsel (TSC) 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 3.2 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 12,500 first-time recipients and the same number of long-time recipient contacts.
- 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.

The primary list provided by CRA was further scrubbed by TSC 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 12,500 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 12,500 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 a proprietary randomization function in the data collection software (DASH). As the sample was depleted, the approach was repeated as necessary to obtain the final target number of contacts required.

In total, TSC completed surveys with 1,150 CCB recipients across Canada (500 first-time recipients and 650 long-time recipients). Soft quotas were established to ensure the final sample closely aligned to regional, gender and age proportions reflected in the sample provided by CRA. Otherwise, no additional quotas were set. The telephone survey was conducted between January 11 and 25, 2022. The length of the survey fell within the intended duration of no more than 10 minutes. In accordance with Government of Canada public opinion research (POR) accessibility requirements, an alternative PDF format of the survey was also made available. 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

Across the board, CRA continues to receive high satisfaction ratings on CCB services. This is true both with respect to recipients' satisfaction with the overall experience as well as their experience across a range of service areas, processes and attributes. The findings from the current survey are generally in line with those from 2021 and 2020.

The table below summarizes the 'net' satisfaction scores in all areas which were measured, showing the comparisons across three years – 2020, 2021 and 2022. The 'net' satisfaction score combines the percentage of respondents who gave a rating of 'very' or 'somewhat satisfied' on the measure being assessed. This table also shows the difference in scores given by first-time recipients and long-time recipients, for the current year only.

Note that the table includes results that apply to all recipients as well as to certain sub-sets, only consistent with the approach taken in 2020 and 2021. For example, only those who had contacted the CRA about CCB services in the last 12 months were asked to assess their satisfaction on certain service attributes such as how quickly their issue was resolved or the accuracy of the response they received. Similarly, recipients who said they had contacted the CRA by telephone regarding CCB services were asked to rate their level of satisfaction with the interaction between themselves and the CRA agent.

Overall levels of satisfaction with CRA, taking into account all interactions related to the CCB, remains high and similar to levels reported in each of the last two years (85% in 2022; 87% in each of 2021 and 2020). Although first-time recipients (88%) express higher levels of overall satisfaction overall compared to long-time recipients (83%), the majority of recipients in both categories offer the highest rating of 'very satisfied' (52% and 51%, respectively).

Satisfaction ratings ranged from a high of just over nine in ten (93%) associated with the professionalism shown by the CRA agent, among those who contacted CRA by telephone, to just under three in four (72%) in terms of how quickly their issue was resolved, among those recipients who have had an interaction with CRA about the CCB within the last 12 months. As such, there is a spread of 21 points from the highest to the lowest satisfaction score offered by recipients. This is a slightly larger gap than was the case in 2021 (16-points). While a number of the scores for 2022 have fallen below the 80 percent level, which is typically viewed as the 'floor' for minimum target acceptable levels of client satisfaction, none of these reflect a statistically significant decline in satisfaction relative to the scores reported in 2021.

Satisfaction scores for first-time and long-time recipients varied only minimally. First-time recipients offer higher ratings of satisfaction in regards to the accuracy of the response received, among those who had contacted CRA about CCB services within the last 12 months (87% versus 78% among long-time recipients). By contrast, while the overall rating of satisfaction with the timeliness of issue resolution did not differ significantly between first-time (75%) and long-time recipients (66%), the latter group was more likely to express dissatisfaction (29%) compared to the former (15%).

NET SATISFACTION WITH CCB SERVICES AND KEY SERVICE ATTRIBUTES

KEY SERVICE ATTRIBUTE	0	2021 TOTAL %	2022 TOTAL %	2022 First-time recipients %	2022 Long-time recipients %
Professionalism shown by the CRA agent*	90	90	93	95	87
Safeguards in place to protect personal and business information***	85	84	90	91	88
Satisfaction with the overall experience, across all interactions with CRA regarding the CCB	87	87	85	88	83
Time it took to receive first CCB payment**	85	86	84	84	-
Accuracy of response of the response received***	80	85	84	87	78
Way that CRA agent resolved the issue*	77	83	83	90	68
Ease of understanding information on last CCB notice	80	80	77	75	79
Accuracy of information on CCB notices	79	80	77	79	75
How quickly issue was resolved***	74	74	72	75	66

Base sizes vary per statement.

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

** Asked only of first-time recipients

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

Notably, a consistent finding throughout many of the 2022 survey results is that those who speak a language other than English or French tend to offer higher ratings on many aspects of CRA's service with respect to delivery of the CCB program. While satisfaction ratings were strong across the board, this group consistently expresses higher levels of satisfaction, overall (91%), and in terms of service attributes including the accuracy of response provided for those who have been in contact with CRA about the CCB in the last 12 months (92%) as well as the timeliness of the first CCB payment (88%). These results may be an indication of the effectiveness of CRA's outreach to CCB recipients whose first language is neither English nor French and that these efforts are having a positive impact on the experience with and perceptions of the CRA.

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

A relatively small percentage of those surveyed in 2022 had contacted CRA within the past year about CCB services (17%), in line with findings from 2021 (19%) and 2020 (17%). First-time recipients (28%) continue to be more likely to have contacted CRA compared to long-time recipients (9%).

The reasons for contacting CRA have remained relatively stable across the last three years. The largest proportion of recipients contacted CRA to update their file (44% vs. 46% in 2021), followed by those who are dealing with an application (31% vs. 38% in 2021) and those addressing an issue related to issuance of payment (21%, the same as in 2021). A much smaller proportion have been in touch to obtain general information (11% vs. 16% in 2021) or in regards to a service complaint (4%, identical to the finding in 2021).

As was the case in 2021, reasons for contact varied between first-time and long-time recipients. Most long-time recipients contacted CRA regarding an update to their file (61% vs. 37% for first-time recipients), whereas the plurality of first-time recipients are more likely to have been in contact with CRA regarding their application (41% vs. 8% among long-time recipients). A higher proportion of long-time recipients also contacted CRA for general information as compared to first-time recipients (17% vs. 9%, respectively).

Telephone remains the primary method of contact for the vast majority of recipients who contacted the CRA in the last 12 months (82% in 2022; 79% in 2021; 78% in 2020). And, almost two-thirds (64%) say that, based on their last experience, it was ‘easy’ to access CCB services, consistent with findings in 2021 (62%) and 2020 (65%). While the experience of first-time and long-time recipients is roughly comparable, the former (68%) are more likely to report finding it ‘easy’ compared to the latter (54%). Notably, perceptions regarding how easy or difficult it is to access CCB services does not vary by the method of contact. Those who contacted CRA by telephone (62%) were equally likely to rate access as ‘easy’ compared to those who contacted CCB online (64%).

3. Awareness of CCB Online Services

Despite the continuing inclination of most recipients to contact CRA by telephone, awareness of the various features and options to manage or update one’s CCB profile online is reasonably good and consistent with findings from previous years. Recipients exhibit high levels of awareness of the ability to update their personal information for benefit and credit purposes through My Account (82% in 2022; 85% in 2021; 78% in 2020). Awareness is 20-points lower, but in line with previous years’ results, in terms of being able to pay their CCB balances owing using the CRA online My Payment service or online banking (62% in 2022; 65% in 2021; 60% in 2020). Familiarity with the web-based app (My Benefits CRA) which allows recipients a quick view of their benefit and credit details and their eligibility information is lower, but still a majority (56% in 2022; 60% in 2021; 54% in 2020).

Those recipients who have interacted with CRA via their online services continue to provide positive feedback, with three-quarters or more saying the information is complete, helpful, accessible and easy to understand.

4. Awareness of the Need to File a Tax Return

Awareness of the need to file a tax return in order to continue receiving CCB benefits has been stable over the last three years. About nine in ten recipients (89%) are aware of this requirement, although awareness is higher among long-time recipients (94%) compared to first-time recipients (82%). Almost one in five first-time recipients (18%) remain unaware of the need to file a tax return, suggesting there are ongoing opportunities for CRA to educate and inform this group of recipients in particular.

5. Applying for CCB in the Future

Over half (55%) of recipients say that, if they had another child, they would apply for the CCB through the online ‘My Account’ portal. First-time recipients (63%) in particular express a strong preference to apply via this method.

Another third of recipients say they would apply at the hospital (32%), while very few suggest they would apply by completing the paper Form RC66 (3%).

To the extent that there are regional differences in preferences for the method of application in the future, these should be considered in any strategy that CRA implements, especially if there is a desire to encourage the use of the online option. Applying at the hospital, is more likely to be preferred by recipients in the Atlantic Region and on the Prairies, while applying online is the preferred method for those residing in B.C./North and Ontario.

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=38) recipients said they had. This proportion is in line with the finding from 2021 (3%, n=34).

While the base of those who responded in the affirmative to this question is quite small, over two-thirds (66%) said it was either ‘somewhat’ or ‘very easy’ to fill out the questionnaire. About one-quarter (26%) indicate having some

difficulty. While this number is slightly higher as compared to 2021 (15%), it remains lower than what was reported in 2020 (39%), a reflection that, on balance, recipients continue to respond positively to any previous improvements to the questionnaire. Nevertheless, the fact that one-quarter find it difficult warrants a review.

D. Conclusions

The current high levels of satisfaction from first-time and long-time CCB recipients in the 2022 reflect a generally positive experience in terms of their interactions with CRA regarding the CCB. Moreover, there has been little change in satisfaction scores over the last three years, suggesting that CRA continues to maintain a positive relationship with CCB clients on many aspects of its service.

At the same time, the findings underscore a number of areas which could be the focus for ongoing service improvement as follows:

- **Encouraging a further shift to the online platform:** The vast majority of recipients continue to contact CRA by telephone and most are doing so to update their file or in regards to their application. A smaller number are contacting CRA in relation to an issuance of payment, for general information or for a service complaint. The continued dominance of telephone as a primary service channel contrasts with the fact that four in five recipients are aware of the ability to update their personal information online through My Account. Moreover, the general view of those recipients who have used CRA's online services is a positive one. They find the information provided is complete, helpful, accessible and easy to understand. Additionally, the stated preference of the majority of recipients, should the need arise in the future, is to apply for the CCB online, using the secure portal 'My Account.' The findings suggest that while there is a reasonably high awareness of the online features which recipients can use to manage and monitor their CCB account, a strong preference by recipients to be able to interact with CRA online, and general satisfaction with various aspects of the online platform, recipients still tend to default to telephone as their primary method of contact with CRA about the CCB. More efforts may be required to remind recipients of the online option and, in particular, that the MyBenefits CRA web-based app is a quick way for recipients to view their benefit and credit payment details. While most recipients who contact CRA by telephone are satisfied with the professionalism of the agent and the way in which he or she resolved their issue, promoting the online platform and web app would serve to reduce pressure on the call center and service agents. Notably, although telephone is the most frequently cited method of contact among both first-time and long-time recipients, satisfaction ratings among long-time recipients regarding the promptness of issue resolution are much lower compared to first-time recipients. This may be a factor of the complexity of their issue and/or their history as a CCB client. One option to consider may be to have service agents remind first-time recipients in particular of the online option which would promote further take-up and possibly sustained use of the online platform over time. This should also be considered as a strategy for long-time recipients, although it may prove more challenging to shift a large proportion of this group from telephone to online.
- **Maintaining or improving telephone service standards:** Given the volume of recipients who report contacting CRA via telephone, monitoring and maintaining a high level of service client service via telephone is important to ensuring ongoing overall satisfaction among CCB clients. While simultaneously encouraging a shift to the online platform, CRA should continue to track and assess first call resolution in order to better understand how the call center team is handling inquiries and requests as well as the types of requests that are generating more critical feedback from clients or are taking multiple calls to resolve.

MORE INFORMATION

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Signed: _____

