Service Canada Client Experience Qualitative Research 2021-22

Qualitative findings executive summary

Prepared for Employment and Social Development Canada (ESDC)

Ce rapport est aussi disponible en français

Political Neutrality Statement

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications.

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Mike Colledge

President

Ipsos Public Affairs

Executive Summary

Background, Objectives and Methodology

Service delivery is fundamental to achieving ESDC's mandate and contributes to the achievement of policy and program results. Citizen Service Branch (CSB) at Service Canada conducts the Client Experience (CX) Survey as part of an organized approach to collecting client feedback in accordance with Treasury Board Secretariat's *Policy on Service and Digital*, which requires client-centric service design and delivery that is accessible and inclusive (4.2.1.1).

The 2021-22 CX Survey has a quantitative phase, followed by a qualitative phase of CX research. The quantitative results of the 2021-22 Survey are available under a separate cover. The CX Survey project is a well-established tracking study tailored to Service Canada's CX ecosystem.

The research objectives of the qualitative research component are to explore service channel preferences, barriers and opportunities for improvement to service delivery and channel use, with a special focus on the "seniors" cohort. A mix of in-depth interviews (32) and online focus groups (8) were conducted between September 7 and October 7, 2022. Participants who were screened into the focus groups or in-depth interviews were those who had lower satisfaction and/or experienced a barrier to accessing service. A total of 76 clients participated in the qualitative research. The findings presented in this report are qualitative in nature, meaning that they provide an in-depth exploration of the research issues and at no point is the intention to produce results that are statistically representative of the population at large.

Key Findings and Conclusions

Though participants may have experienced barriers or had given a lower satisfaction rating when responding to the telephone survey, there was a general overall satisfaction in their experience with Service Canada.

- Although they experienced some difficulties, most participants expressed at least some degree of satisfaction or said they got what they needed when describing their overall experience interacting with Service Canada. Despite having encountered some barriers or challenges along the way, most clients who participated in the research were pleased with the professionalism, attitude, courtesy, and respectfulness of Service Canada personnel.

However, there was concern about wait times and many experiences of being unable to get in touch with Service Canada when needed, sometimes across multiple attempts.

- Many participants described long wait times to reach a representative on the phone or long lines to access service in person as causes of dissatisfaction, and yet continue to use these channels to access service.
- Some participants described technical issues when using the Service Canada website as a source of dissatisfaction and frustration. They felt that the website should be a more useable digital platform, where technical issues could be easily resolved.

EI participants experienced technical issues, or issues with their Record of Employment (ROE) as sent by their employer, which caused confusion and complications in their application process. This in turn caused stress among participants due to uncertainty about whether they would receive benefits.

- Participants felt there needed to be increased awareness and communication on their ROE to their employer and a standardized set of rules or best practices, to minimize confusion and follow-ups for employees.

- Further, adding a "back" button on the online applications, so that changes can be made, rather than having to call in to have the error corrected – as this created additional stress and delay in the application process for weeks or months.

SIN and eSIN 'churn' occurred when the participants' preferred channel turned out to be inconvenient (in-person) or when they ran into an issue with the online channel that required another channel to resolve it: some were unable to book a timely in-person appointment, others went repeatedly in person but found long line ups, and so they applied online instead. Some experienced issues while applying online and ended up having to go to Service Canada in person to get them resolved.

- Many SIN applicants preferred obtaining the SIN in person because it was expected to be faster than an eSIN application (5-10 days) – this view was driven by word of mouth, and online sources such as social media. In addition to the high-awareness of the 5–10-day turnaround time of the eSIN application, several applicants also preferred the in-person channel due to a lack of confidence that their application would be accepted online without causing delays in receiving their SIN.
- Having the option to complete their application within their initial channel could resolve churn issues. For example, if there is an issue or correction needed when applying online, it could be resolved online rather than needing to go into a Service Canada office or calling a specialized call centre.

In many areas, the experiences seniors had with Service Canada were consistent with other groups, but several nuances also emerged. There were also several program-specific nuances among senior participants.

- Unaided feedback shared by some seniors on their service experience referred to the pandemic when citing a perceived lack of available Service Canada staff, longer wait-times, and inability to reach a service representative through any channel.
- A few seniors mentioned feeling apprehensive about visiting Service Canada in person because of the COVID pandemic, or feeling uncertainty about whether in-person services had resumed.

Those who had the greatest accessibility concerns with Service Canada were among CPPD clients as well as some GIS and OAS participants with physical disabilities or limitations.

- Several senior applicants felt the process of applying for disability or old-age benefits does not take their challenges and age into consideration – i.e.: having to stand in line for a long time; having to complete long and complex forms and questions; having to spend a lot of time and energy waiting on hold, calling back, or being transferred; not being able to read the font size without using a magnifying glass.

Seniors applying to CPP and OAS/GIS called for greater certainty on their application status for planning purposes when applying for these programs. The availability of non-online service channels was of great importance.

- Many spoke of their desire to have non-online service channel options available to them, such as phone and in-person, as they do not feel sufficiently technically savvy or have the necessary equipment to get information, apply and follow up online. Non-online options should be quick with reasonable wait times.
- Some were unsure of their eligibility or the amount of the benefit, and without a status update or an advanced decision these individuals were unable to confidently plan ahead and budget.

- Most OAS participants received a letter a few months in advance (and some received one up to a year in advance) telling them they were auto-enrolled and that no action was required – this was deemed straightforward, although several had questions relating to the option to defer.

Most CPPD participants required a lot of support in completing and submitting their applications. Many felt the application form is long and onerous to complete. The necessary documentation also requires a lot of time and energy to assemble.

- When it came to applying, the most frequently identified challenges were related to the length of the application form, as well as the type of information required to complete the form.
- Those who did not have support, or began their application without support, found the process overwhelming.
- A variety of sources provided support, including doctors, social workers, and insurance companies.

Indigenous participants' service experiences tended to be similar to those of other clients in the same program. However, awareness of programs was low and interest in receiving additional resources and supports specifically for clients who are Indigenous was high.

- Many were satisfied with their service experiences and provided feedback consistent with non-Indigenous participants who had applied to the same programs.
- A specific question was posed about use of resources and supports, such as friendship centres and Indigenous Skills and Employment Training Program. Awareness of these resources was low, while interest in learning more about them, and using them in the application process, was high.

Ideal service experiences are ones that are fast, easy, and simple, while remaining compassionate and informative.

- Because many participants did not feel that they received timely service, much of the feedback on ideal service experiences focused on speed: fast, timely, prompt, efficient, smooth, immediate.
- Ease and simplicity were also important – participants would like an experience where the steps to apply are clearly explained and the application process is simple. These ideal service experiences cover situations where something is incorrect or goes wrong but is easily resolved – much of the complications experienced by participants revolved around errors that required a lot of work to address and correct.

Participants' choice of service channel was dependent on the nature of the intended service interaction.

- Service channel preference varied and was highly dependent on the context of the service need and the program. Some participants said they had no service channel preference, saying that their preference depended on the nature of the service interaction.
- In other words, these clients select the service channel that, in their view, is best suited to the service interaction. This suggests a potential need to reconsider future service channel design and/or improvements from the perspective of function. For example, if clients prefer to use Service Canada's website for quick access to things like application forms, these forms should be made more clearly accessible from the landing page of the website. If clients are asking for resolutions to specific questions over the phone, representatives should be able to access client files or previous call logs to maximize the likelihood the question can be addressed in one transaction.
- Most seniors preferred traditional service channels, such as in-person and phone. They felt strongly that options for paper, phone and/or in person should continue to be provided.