Client Service Feedback Survey 2021-2022

Analysis Report

Public Services and Procurement Canada (PSPC)

Supplier name: Advanis Inc.
Contract number: EP082-212778/001/CY
Contract value: $ 28,773.00 (before taxes)
Award date: July 26, 2021
Delivery date: July 25, 2022

Prepared for:
Public Services and Procurement Canada
Pension Excellence Sector

For more information on this report, please contact Public Services and Procurement Canada at: TPSGC.Politiquesdepension-PensionPolicies.PWGSC@tpsgc-pwgsc.gc.ca

Registration number: POR 130-20

Ce rapport est aussi disponible en français

Canada

Table of contents

Client Service Feedback Survey 2021-2022
Analysis Report

Prepared for Public Services and Procurement Canada (PSPC)
Supplier Name: Advanis Inc.
July 2022

This report presents the results and methodological details for the *Client Service Feedback Survey 2021-2022* conducted by Advanis Inc. on behalf of Public Services and Procurement Canada (PSPC). The survey was administered among 1,622 pension members, between March 30 and May 2, 2022.

Ce rapport est aussi disponible en français sous le titre: Sondage sur la rétroaction du service à la clientèle 2021-2022.

This publication may be reproduced for non-commercial purposes only. Prior written permission must be obtained from Public Services and Procurement Canada (PSPC). For more information on this report, please contact PSPC at:
TPSGC.Politiquesdepension-PensionPolicies.PWGSC@tpsgc-pwgsc.gc.ca

Lester B. Pearson Building Tower B3
125 Sussex Drive
Ottawa, Ontario K1A 0G2
Canada

1.0 Summary

1.1 Background and objectives

Public Services and Procurement Canada (PSPC) provides day-to-day pension services through two service channels, the Government of Canada Pension Centre, and the Pension Program secure employee portal for pension plan members belonging to the Public Service, Canadian Forces, and Royal Canadian Mounted Police.

PSPC, in creating a culture of client service excellence, wishes to evolve service delivery based on feedback from its members. To that end, PSPC was seeking to measure member satisfaction with regards to the Pension Program's service delivery channels.

The primary objectives of the research were to:
- Assess members' (pension members) satisfaction of services offered by the Government of Canada Pension Centre during service calls or with any services used online by members.
- Assess pension members' ease of use, understanding and experience with pension online tools or content.
- Assess the importance that pension members place on different online web applications and future applications.

The probability-based study was conducted in English and French online and over the phone. Overall, 1,622 people completed the survey between March 30, 2022, and May 2, 2022. The data was weighted according to the pension group of the respondents (PSSA, CFSA, or RCMP) and service line (online vs phone) from the population of pension plan members that were in contact with the Government of Canada Pension Centre or accessed the Online Portal between February 21, 2022, and March 23, 2022.

The results will be used by PSPC to identify opportunities for improvements in the way they deliver services.

The total cost of this research was $28,773.00 (before taxes).

1.2 Key findings

Most pension members who answered the survey were satisfied with the service they received (78.9%). It was the case for 88.1% of those who contacted Pension Centre and 75.0% of those who used the Online Portal.

Requesting general pension information, a form or documentation was the main reason for contacting the Pension Centre (42.7%). Those who contacted the Pension Centre were especially satisfied with the courteousness (96.0%), the helpfulness (91.1%) and the knowledge of the staff (88.7%).

Getting a pension estimate was the main use of the Online Portal (69.8%). Online Portal users were satisfied with the ease of login (80.2%), the ease of landing page navigation (71.3%) and the ease of self-service options (71.3%).

More than two thirds (68.0%) reported the information was easy to understand (score of at least 8 on a scale of 1 to 10). This proportion was 81.7% for those who called the Pension Centre and of 62.1% for Online Portal users.

Eight respondents out of ten (80.0%) reported they were very likely (score of at least 8 on the 10-point likeliness scale) to access personal pension information from a home, personal laptop if this was available. Among Pension Centre respondents, 56.2% liked that the agents were helpful, knowledgeable, or were able to provide answers the most. However, 46.1% mentioned that the information provided could be improved and 31.1% thought delays could be shortened.

What Online Portal users liked the most was its user-friendly aspect (33.9%) and having the ability to estimate their pension (31.1%). More than half (52.5%) thought that the information provided could be most improved.

1.3 Extrapolating the results to a broader audience

Since the target population only includes respondents who had recently called the Pension Centre or visited the Online Portal during a specific period, results cannot be extrapolated to another period or for the broader population
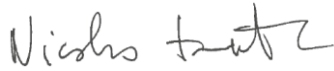
1.4 Political Neutrality Certification

Political neutrality certification

I hereby certify as Senior Officer of Advanis 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.

Signed:

Nicolas Toutant, Vice-President, Research and Evaluation

2.0 Methodology

2.1 Sample planning and data collection

The target population for the survey was both retired and active pension members, more specifically:
- Public Service Superannuation Plan active employees and retired members (PSSA), including Crown Corporation active employees and retired members.
- RCMP Superannuation Plan active officers and retired members (RCMPSA).
- Canadian Forces Superannuation Plan active regular force and reservist and retired members (CFSA)

This survey was sent to members of the target population who had recently called the Government of Canada Pension Centre or visited the Pension Program secure employee portal. To reach this population, Advanis used a multimodal approach. Potential respondents who recently visited the Online Portal were invited by email to participate in the survey. Potential respondents who recently called the Government of Canada Pension Centre were also invited to participate in the web survey and some were called using a computer-assisted telephone interviewing (CATI) methodology.

Two different samples were sent by PSPC. The first contained a list of active and retired members who recently called the Government of Canada Pension Centre and included information to reach them by phone and by email. The second contained a list of active members who recently visited the Online Portal and included information to reach them by email only.

Data collection started on March 30, 2022 and ended on May 2, 2022. A pretest took place from December 15, 2021, to December 22, 2021. The Government of Canada's standards for pre-testing were adhered to, with pretests being conducted in both English and French. In total, 96 surveys were completed during the pretest (23 by phone and 73 on the web). The pretest data was not retained for the analysis because a significant amount of time had passed between the pretest and data collection.

Email invitations were sent for Online Portal potential respondents and Pension Centre potential respondents who had not answered the survey on the phone or had not stated their refusal. In total, 3,206 members were invited via email to participate in the study. On March 30, 2022, 1,000 Online Portal respondents were invited and 2,206 Pension Centre respondents were invited on April 11, 2022. Up to two email reminders were sent to those who had not yet completed the survey and had not stated their refusal to participate.

Table 1: Number of initial invitations sent

Message ID	Purpose	Total Sent
1	Invitation (EN) (Online Portal)	780
2	Invitation (FR) (Online Portal)	220
3	Invitation (EN) (Pension Centre)	1,600
4	Invitation (FR) (Pension Centre)	606
Total		**3,206**

Data collection on the phone was performed from March 31, 2022, to April 5, 2022, with members who had recently called the Pension Centre. A total of 2,965 Pension Centre potential respondents were called. Of those, 97 had a number that was not in service, a wrong number, or could not be reached for reasons related to their phone number. It is to be noted that 502 respondents agreed to participate in the survey, however, 14 were not eligible.

In total, 1,622 respondents participated in the *Client Service Feedback Survey 2021-2022*. Of those 1,622, a total of 1,255 were respondents who recently called the Pension Centre and 367 as respondents who recently visited the Online Portal. All Online Portal respondents answered the web survey. A total of 488 Pension Centre respondents answered the survey on the phone and 767 answered on the web.

2.2 Questionnaire

The *Client Service Feedback Survey 2021-2022* was designed by PSPC. The questionnaire was programmed by Advanis in both English and French. An electronic version of the survey was provided to PSPC for review at several steps. After incorporating changes from PSPC, a final version in both official languages for both CATI and web was created.

The average survey length was 5.6 minutes for completing the web survey and 6.9 minutes for completing the survey over the phone.

2.3 Calls Monitoring

The data collection period started after the questionnaire had been validated and tested.

The interviewers' work schedule extended from 4:00 p.m. to 9:00 p.m. Monday to Friday, and from 10:00 a.m. to 6:00 p.m. on Saturdays and Sundays. Occasionally, interviews began calling earlier if requested by a respondent (appointments monitoring).

The call-back plan distributed calls during the day and over the weekend at different hours.

2.4 Weighting

The data was weighted according to the pension group of the respondents (PSSA members, CFSA members or RCMP members) and whether the respondent recently contacted the Pension Centre on the phone or recently consulted the Online Portal (Pension Centre respondent vs. Online Portal respondent), using the population files sent by PSPC. The first list contained all members who had called the Pension Centre between February 21, 2022, and March 23, 2022. The second list contained all members who had visited the Online Portal between February 21, 2022, and March 22, 2022.

3.0 Note to readers

The term "respondent" will be used throughout this report to refer to all participants in the study. All survey results are presented excluding "Don't know" answers from the base of valid responses.

In this report, *Pension Centre respondents* refers to the respondents who had recently called the Pension Centre and *Online Portal respondents* refers to those who had recently visited the Pension Program secure employee portal.

Readers should also keep in mind that the total for percentages presented in tables and charts may not sum to 100.0% due to rounding. Indeed, a maximum variation of more or less 1.0% is to be expected.

4.0 Results

4.1 Respondents' profile (unweighted data)

More than 3 quarters (77.4%) of respondents had recently called the Pension Centre. The others had recently visited the Online Portal (22.6%).

Table 2: Respondent type

Type	Counts	%
Pension Centre	1,255	77.4%
Online Portal	367	22.6%
Total	**1,622**	**100.0%**

Unweighted data – Sample field

Most respondents were PSSA members (77.6%), 18.9% were CFSA members and 3.5% were RCMP members. Among Online Portal respondents, the vast majority was a PSSA member (95.1%). Almost three quarters (72.5%) were PSSA members among Pension Centre respondents.

Table 3: Pension group

Pension group	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,255	367	1,622
PSSA	72.5%	95.1%	77.6%
CFSA	23.5%	3.3%	18.9%
RCMP	4.0%	1.6%	3.5%
Total	**100.0%**	**100.0%**	**100.0%**

Unweighted data – Sample field

Among all respondents, 61.8% were currently employed by the Federal government, more than a third (35.0%) were retired, and only 0.4% were survivors. Online Portal respondents were almost all currently employed (99.5%) and Pension Centre respondents were more evenly split between currently employed (50.8%) and retired (45.3%) members.

Table 4: Status at the Pension Centre

Status at the Pension Centre	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,255	367	1,622
Active (currently employed)	50.8%	99.5%	61.8%
Non-Active (retired)	45.3%	0.0%	35.0%
Survivor	0.5%	0.0%	0.4%
Other	3.5%	0.5%	2.8%
Total	**100.0%**	**100.0%**	**100.0%**

Unweighted data - **D1 :** What is your current status at the Government of Canada Pension Centre?

More than half (53.8%) of respondents were between 40 and 59 years old (49.1% of Pension Centre respondents and 69.7% of Online Portal respondents). More Pension Center respondents were 60 years old or older compared to Online Portal respondents (38.2% compared to 15.8%).

Table 5: Age

Age	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,242	366	1,608
Less than 40	12.6%	14.5%	13.1%
40 to 59	49.1%	69.7%	53.8%
60 or older	38.2%	15.8%	33.1%
Total	**100.0%**	**100.0%**	**100.0%**

Unweighted data -**D2**: What age group do you fall under?

Most respondents (68.0%) were not members of a visible minority, living with a disability, LGBTQ2+ or Indigenous.

Table 6: Population groups

Population groups	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,255	367	1,622
None	70.2%	60.5%	68.0%
Members of a visible minority	9.1%	15.8%	10.6%
Persons with disabilities	10.3%	4.9%	9.1%
LGBTQ2+	2.6%	3.3%	2.8%
Indigenous peoples	2.3%	3.0%	2.5%
Prefer not to answer	7.2%	14.7%	8.9%
Total	**100.0%**	**100.0%**	**100.0%**

Unweighted data -**D3**: Do you belong to any of the following groups?

Among those who answered the survey, 50.8% were female, 49.1% were male and 0.1% were non-binary.

Table 7: Gender

Gender	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,222	340	1,562
Male	50.2%	45.0%	49.1%
Female	49.8%	54.7%	50.8%
Non-Binary	0.0%	0.3%	0.1%
Other	---	---	---
Total	**100.0%**	**100.0%**	**100.0%**

Unweighted data -**D4**: Please identify your gender

4.2 Reasons for contacting the Pension Centre or visiting the Online Portal (weighted data)

The main reason for calling the Pension Centre was to request general pension information, a form or documentation (42.7%). More than a fifth (20.4) called to request a buyback estimate or to apply to buy back service. Almost a fifth called regarding their pension payments or to get an estimate of their pension (18.7%) or to update their profile (18.1%).

Table 8: Reasons for calling the Pension Centre (Pension Centre respondents)

Reasons for calling the Pension Centre	Pension Centre (%)
n =	1,247
Request general pension information, a form or documentation	42.7%
Request a buyback estimate and/or apply to buy back service	20.4%
Pension payments / Request an estimate of my pension	18.7%
Update my profile (name, address, banking information, etc.)	18.1%
Life Events (Enrollments, marriage status, Supplementary Death Benefit)	7.9%
Income tax related	5.2%
Medical insurance/coverage/payment/benefits	2.6%
Related to bridge benefit	0.3%
Other	4.5%
Total	**100.0%**

Q2a: What was the purpose of your call to the Pension Centre?

Getting a pension estimate was by far the main reason for using the Online Portal (69.8%). More than a fifth (22.9%) used the Online Portal for the buyback estimator or to get their payment status.

Table 9: Reasons for using the Online Portal (Online Portal respondents)

Reasons for using the Online Portal	Online Portal (%)
n =	366
Get a pension estimate	69.8%
Service buyback estimator / payment status	22.9%
Update personal information (address, contact details, etc.)	14.4%
To answer a question / get information	11.7%
Survivor benefits estimator	8.1%
Other	2.1%
Total	100.0%

Q2b: What was the reason for your use of the Online Pension Portal?

4.3 Satisfaction (weighted data)

Overall, most respondents were satisfied with the service they received (78.9%). Those who called the Pension Centre were satisfied in a proportion of 88.1%. It was the case for 75.0% of Online Portal respondents.

Table 10: Satisfaction with the service received

How would you rate your experience with the service you received?	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,255	367	1,622
NET Satisfied	88.1%	75,0%	78.9%
NET Dissatisfied	9.2%	13,6%	12.2%
Very Satisfied	67.7%	37.1%	46.3%
Somewhat Satisfied	20.5%	37.9%	32.6%
Neither Satisfied nor Dissatisfied	2.7%	11.4%	8.8%
Somewhat Dissatisfied	5.2%	7.3%	6.7%
Very Dissatisfied	3.9%	6.2%	5.5%
Total	100.0%	100.0%	100.0%

Q5 : How would you rate your experience with the service you received?

The courteousness of the staff was the item Pension Centre respondents were the most satisfied with (96.0%), followed by the helpfulness of the staff (91.1%) and the knowledge level of the staff (88.7%). The ease of navigating the automated phone system was the item Pension Centre respondents were the least satisfied with, even though more than three quarters were satisfied (76.9%).

Table 11: Satisfaction with different aspects of the Pension Centre (Pension Centre respondents)

How would you rate your satisfaction related to the following?*	Satisfied (%)	Neutral (%)	Dissatisfied (%)	Total (%)
The courteousness of staff (n = 1,245)	96.0%	2.3%	1.6%	100.0%
The helpfulness of staff (n = 1,250)	91.1%	4.8%	4.1%	100.0%
The knowledge level of staff (n = 1,242)	88.7%	6.2%	5.1%	100.0%
The clarity of the information provided to you (n = 1,244)	85.8%	6.7%	7.4%	100.0%
The timeliness of the service you received (n = 1,246)	84.4%	6.9%	8.6%	100.0%
Ease of navigating the automated phone system (n = 1,221)	76.9%	13.3%	9.8%	100.0%

Q3a: Thinking back on your recent experience with the Government of Canada Pension Centre, how would you rate your satisfaction related to the following?
*This question was asked to Pension Centre respondents only.

For their part, 8 Online Portal respondents out of 10 (80.2%) were satisfied with the ease of login on the Online Portal. A little more than 7 respondents out of 10 were satisfied with the ease of landing page navigation and the ease of self-service options (71.3% and 70.4%, respectively).

Table 12: Satisfaction with different aspects of the Online Portal (Online Portal respondents)*

How would you rate your satisfaction related to the following?**	Satisfied (%)	Neutral (%)	Dissatisfied (%)	Total (%)
Ease of login	80.2%	14.5%	5.3%	100.0%
Ease of Landing Page navigation	71.3%	19.3%	9.4%	100.0%
Ease of self-service options	70.4%	18.5%	11.1%	100.0%

Q3b: Thinking back on your recent experience using the Online Pension Portal, how would you rate your satisfaction related to the following?
*n = 363
*This question was asked to Pension Centre respondents only.

4.4 Understanding the information provided (weighted data)

More than two thirds (68.0%) considered that the information they were provided was easy to understand by giving a score of at least 8 on a 10-point scale. Pension Centre respondents were 81.7% to give a score of at least 8, whereas it was the case for 62.1% of Online Portal respondents. Respondents who were 60 years old or older were more likely to give a score of at least 8 (76.3%) than those who were 40 to 59 years old (68,4%) and less than 40 years old (53.8%).

Table 13: Understanding the information provided

Was the information you were provided, easy to understand?	Pension Centre (%)	Online Portal (%)	Total (%)
n =	1,216	356	1,572
NET (8 to 10)	81.7%	62.0%	68.0%
NET (4 to 7)	15.6%	32.6%	27.5%
NET (1 to 3)	2.7%	5.4%	4.6%
Total	100.0%	100.0%	100.0%

Q4: On a scale of one to 10, was the information you were provided, easy to understand?

4.5 Contact options

Accessing personal pension information from a personal laptop is the contact option respondents would be most likely to use, if available. Indeed, 80.0% reported they would use it by giving a score of at least 8 on a 10-point likeliness scale. This proportion was 63.0% for virtual meetings with the Pension Centre.

Table 14: Contact options (all respondents)*

How likely would it be for you to use the following contact options?	NET (8 to 10)	NET (4 to 7)	NET (1 to 3)
Accessing personal pension information from a home, personal laptop	80.0%	12.8%	7.3%
Virtual meeting (Audio/Video call) with Pension Centre	63.0%	25.0%	12.0%
Webchat/IM (Instant Messaging) with Pension Centre	52.5%	28.1%	19.3%
Mobile application	52.0%	27.0%	21.0%
Text (SMS) notices/reminders	49.0%	29.4%	21.6%

Q6: On a scale of 1 to 10, how likely would it be for you to use the following contact options if they were available?
*n = 1 622

Among Pension Centre respondents only, accessing personal pension information is followed by virtual meetings with the Pension Centre as well. The contact option Pension Centre respondents would be the least likely to use is a webchat.

Table 15: Contact options (Pension Centre respondents)

How likely would it be for you to use the following contact options?	NET (8 to 10)	NET (4 to 7)	NET (1 to 3)
Accessing personal pension information from a home, personal laptop	80.1%	13.9%	5.9%
Virtual meeting (Audio/Video call) with Pension Centre	56.1%	26.9%	17.1%
Text (SMS) notices/reminders	55.9%	24.9%	19.2%
Mobile application	51.6%	26.6%	21.8%
Webchat/IM (Instant Messaging) with Pension Centre	47.1%	26.7%	26.3%

Q6: On a scale of 1 to 10, how likely would it be for you to use the following contact options if they were available?
*n = 1 255

Online Portal respondents also had accessing personal pension information from a personal laptop and virtual meetings as contact options they would be most likely to use. Receiving SMS notices or reminders is the contact option they would be the least likely to use.

Table 16: Contact options (Online Portal respondents)*

How likely would it be for you to use the following contact options?	NET (8 to 10)	NET (4 to 7)	NET (1 to 3)
Accessing personal pension information from a home, personal laptop	79.9%	12.3%	7.8%
Virtual meeting (Audio/Video call) with Pension Centre	65.9%	24.3%	9.8%
Webchat/IM (Instant Messaging) with Pension Centre	54.9%	28.8%	16.3%
Mobile application	52.2%	27.2%	20.6%
Text (SMS) notices/reminders	46.0%	31.4%	22.6%

Q6: On a scale of 1 to 10, how likely would it be for you to use the following contact options if they were available?
*n = 367

4.6 Strengths and things to improve (weighted data)

When asked what respondents liked most about their interaction with the Pension Center was, 56.2% of Pension Centre respondents reported that agents they have interacted with were helpful, knowledgeable, or were able to provide answers. A proportion of 37.9% mentioned the agent's soft skills and 31.8% praised the efficiency of the Pension Centre.

Table 17: Most liked thing about respondent's interaction with the Pension Centre

What is the one thing you liked most about your interaction with the Pension Centre?	Pension Centre (%)
n =	1,132
Agents are helpful/knowledgeable/provide answers	56.2%
Agents' soft skills (ex: friendly, courteous, polite)	37.9%
Efficiency (ex: quick/easy to access/short delays)	31.8%
General comment about customer services	10.7%
Talking to a real person	6.1%
Other	1.4%

Q7a: Overall, what is the one thing you liked most about your interaction with the Government of Canada Pension Centre?

Even though many respondents mentioned they like the fact that agents were helpful or knowledgeable, 46.1% of those who mentioned things that could be improved also think that the information provided by the Pension Centre could be improved. Delays were also mentioned as something that could be improved by a high proportion of respondents to this question (31.1%). When mentioning delays, a lot of respondents were referring to delays on the phone when waiting to receive a service from the Pension Centre. Some also mentioned delays to get the answer to a question, to receive documents or to process a request.

Table 18: Thing that could be improved on most to improve interaction with the Pension Centre

What is the one thing that could be improved on most to make your interaction with the Pension Centre a more positive experience?	Pension Centre (%)
n =	736
Information (including more knowledgeable staff)	46.1%
Delays	31.1%
Online access (all modes) (ex: request an online access or online services)	23.3%
Better access to agents (all modes)	21.3%
Phone system	11.9%
Website needs to be easier to navigate/user-friendly	5.2%
Other	4.5%
Total	**100.0%**

Q8a: Overall, what is the one thing you believe could be improved on most to make your interaction with the Government of Canada Pension Centre a more positive experience?

For Online Portal respondents, the most liked aspects of their interaction with the Online Portal were finding it user-friendly (33.9%) and having the ability to estimate their pension (31.1%). More than a quarter (26.4%) also mentioned enjoying the ability to access information.

Table 19: Most liked thing about respondent's interaction with the Online Portal

What is the one thing you liked most about your interaction with the Online Pension Portal?	Online Portal (%)
n =	305
User-friendly (ex: fast and easy to use/navigate)	33.9%
Ability to estimate pension/calculator	31.1%
Ability to access information	26.4%
Positive comments about agents (e.g., being able to talk to an agent, knowledgeable, etc.)	10.6%
Quality of information	10.0%
Short delays (ex: no waiting time)	8.5%
General positive comments (e.g., good service, it's good, etc.)	4.1%
Other	1.3%
Total	**100.0%**

Q7b: Overall, what is the one thing you liked most about your interaction with the Online Pension Portal?

Among responses obtained, the aspect of the Online Portal that could be improved was the information provided. Indeed, more than half (52.5%) reported that it could either contain additional information or give more detailed information. Almost a quarter (23.0%) mentioned that the calculator or the method for getting a pension statement could be improved.

Table 20: Thing that could be improved on most to improve interaction with the Online Portal

What is the one thing that could be improved on most to make your interaction with the Online Portal a more positive experience?	Online Portal (%)
n =	250
Information (more information or detailed information)	52.5%
Calculator/pension statement	23.0%
User-friendly	17.7%
Chat/being able to talk to an agent	14.2%
Easier access (ex: mobile app, being able to access outside of work system)	8.7%
Short delays/faster response time (e.g., more timely return calls/messages)	6.8%
Other	5.4%
Total	**100.0%**

Q8b: Overall, what is the one thing you believe could be improved on most to make your interaction with the Online Pension Portal a more positive experience?

5. Conclusion

In general, most respondents were satisfied with the service they received either when contacting the Pension Centre (88.1%) or using the Online Portal (75.0%).

Respondents who contacted the Pension Centre were especially satisfied with the courteousness (96.0%), the helpfulness (91.1%) and the knowledge of the staff (88.7%). Those who used the Online Portal were mostly satisfied with the ease of login (80.2%).

The main reason for contacting the Pension Centre was to request general pension information, a form or documentation (42.7%). For the Online Portal, its main use was to get a pension estimate (69.8%). Overall, more than two thirds (68.0%) reported the information was easy to understand by giving a score of at least 8 on a scale of 1 to 10. This proportion was 81.7% for those who called the Pension Centre and of 62.1% for those who used the Online Portal.

A proportion of 80.0% reported they were very likely (score of at least 8 on the 10-point likeliness scale) to access personal pension information from a home, personal laptop if this was available. This contact option was followed by the ability to have a virtual meeting with the Pension Centre (63.0%).

When asked what they liked the most, Most Pension Centre respondents (56.2%) reported they liked that the agents were helpful, knowledgeable, or were able to provide answers. However, among those who mentioned things that could be improved, 46.1% mentioned that the information provided could be improved.

More than a third (33.9%) of those who used the Online Portal reported that they like the user-friendly aspect and 31.1% reported that they liked having the ability to estimate their pension. Similar to Pension Centre respondents, 52.5% of Online Portal users who mentioned things that could be improved mentioned the information provided.

6. Appendix

Appendix A: Methodology

The *Client Service Feedback Survey 2021-2022* was designed by PSPC. The questionnaire was programmed by Advanis in both official languages.

The survey was administered among members of the target population who had recently called the Government of Canada Pension Centre or visited the Pension Program secure employee portal.

The target population was both retired and active pension members, more specifically:
- Public Service Superannuation Plan active employees and retired members (PSSA), including Crown Corporation active employees and retired members.
- RCMP Superannuation Plan active officers and retired members (RCMPSA).
- Canadian Forces Superannuation Plan active regular force and reservist and retired members (CFSA)

Online portal users were sent an email inviting them to participate in a web survey. Potential respondents who recently called the Government of Canada Pension Centre were invited to participate in the web survey as well. Some were also called using a computer-assisted telephone interviewing (CATI) methodology.

Two different samples were sent by PSPC. The first contained a list of 3,450 active and retired members who recently called the Government of Canada Pension Centre and included information to reach them by phone and by email. The second contained a list of 15,925 active members who recently visited the Online Portal and included information to reach them by email only. Data collection started on March 30, 2022, and ended on May 2, 2022.

In total, 3,206 members were invited via email to participate in the study. On March 30, 2022, 1,000 Online Portal respondents were invited and 2,206 Pension Centre respondents were invited on April 11, 2022. Up to two email reminders were sent to those who had not yet completed the survey and had not stated their refusal to participate. A total of 2,965 Pension Centre potential respondents were called. Data collection on the phone was performed from March 31, 2022, to April 5, 2022.

Appendix B: Email invitations sent

Table 21: Emails sent

Email sent	Pension Centre	Online Portal	Total
1 - Initial invite	**2,206**	**1,000**	**3,206**
bounced	106	92	198
clicked	931	495	1,426
opened	900	126	1,026
sent	269	287	556
2 - First reminder	**1,660**	**685**	**2,345**
bounced	3	1	4
clicked	450	239	689
opened	782	34	816
sent	425	411	836
3 - Second reminder	**1,468**	**607**	**2,075**
bounced	3	1	4
clicked	221	136	357
opened	623	21	644
sent	621	449	1,070
Total	**5,334**	**2,292**	**7,626**

bounced: Invalid email address

clicked: Respondent clicked on the link included in the email

opened: Respondent read the email but did not click on the link

sent: Valid email address but no action was taken

Appendix C: Call statistics (Pension Centre)

	Pension Center survey	%
AVAILABLE	**3,114**	**100.0%**
USED	**3,114**	**100.0%**
Not in service	46	1.5%
Duplicate	2	0.1%
Not residential	3	0.1%
Problem with the line	16	0.5%
Fax	15	0.5%
Wrong number/Bounced email	15	0.5%
NOT VALID	**97**	**3.1%**
VALID	**3,017**	**96.9%**
Not eligible	14	0.5%
OUT OF SAMPLE	**14**	**0.4%**
SAMPLE	**3,003**	**96.4%**
No answer	32	1.1%
Answering Machine	930	31.0%
Appointments	296	9.9%
Incomplete	10	0.3%
Household refusal	174	5.8%
Respondent refusal	275	9.2%
Final refusal	29	1.0%
Prolonged absence	2	0.1%

Total Completes	**1,255**	**41.8%**
Web Completes	**767**	61.1%
CATI Completes	**488**	38.9%

% REFUSALS	**15.9%**
% COMPLETES	**41.8%**
RESPONSE RATE (CATI ONLY)	**21.8%**
RESPONSE RATE (TOTAL)	**41.8%**

Appendix D: Response rate

For the consultation among those who had recently visited the Pension Centre, the response rate was calculated by dividing the number of respondents (1255) by the number of eligible members in the sample (3,003) for a response rate of 41.8%.

For those who visited the online portal, the response rate was calculated by dividing the number of respondents (367) by the number of initial email invitations who reached potential respondents (908). Hence the response rate for the Online portal portion of this study was 40.4%.

Appendix E: The weights

As previously mentioned, the data was weighted according to the pension group of the respondents (PSSA members, CFSA members or RCMP members) and service line (online vs phone), using the population files sent by PSPC. The first list contained all members who had called the Pension Centre between February 21, 2022, and March 23, 2022. The second list contained all members who had visited the Online Portal between February 21, 2022, and March 22, 2022.

Appendix E: Weights

Weights by Pension Groups	Pension Centre	Online Portal
n =	1,255	367
(1) PSSA	0.37637	2.96804
(2) CFSA	0.43287	5.65650
(3) RCMP	0.35636	5.04371

Appendix F: Additional notes

Since the target population only includes respondents who had recently called the Pension Centre or visited the Online Portal during a specific period, results cannot be extrapolated to another period or for the broader population.

When surveying only a sample of a broader population, there are always risks that results suffer from a non-response bias. This happens when characteristics of those who answered the survey differ from those who did not answer. For this study, several strategies were employed to increase response rates and reduce the effects of non-response bias. This includes communicating the purpose and importance of research at the beginning of the survey as well as reassuring respondents on the confidentiality of their responses and on the legitimacy of the survey.

Appendix G: English questionnaire

Canada Pension Members
Government of Canada

Intro

The Minister of Public Services and Procurement of Canada (PSPC) is conducting a survey to learn more about your experience as a pension plan member when accessing our services. Feedback from you is essential to improve the services.

Note: If you need to leave the survey and come back to it later, you may use the same link and the survey will resume where you left off.

Please click on the right arrow to continue
Your participation is voluntary and your answers will remain strictly confidential.

Q2a   *Show if Type 1 GoC Pension Centre*

What was the purpose of your call to the Pension Centre?
Select all that apply
- ❏ ₁   Pension payments / Request an estimate of my pension *
- ❏ ₂   Obtain an update of the status of a transfer payment (transfer value, pension transfer agreement) *
- ❏ ₃   Request a buyback estimate and/or apply to buy back service *
- ❏ ₄   Request general pension information, a form or documentation *
- ❏ ₅   Update my profile (name, address, banking information, etc.) *
- ❏ ₆   Life Events (Enrollments, marriage status, Supplementary Death Benefit) *
- ❏ ₉₇   Other (please specify): _____

*Levels marked with * are randomized*

Q2b   *Show if Type 2 Online Portal*

What was the reason for your use of the Online Pension Portal?
Select all that apply
- ❏ ₁   Get a pension estimate *
- ❏ ₂   Update personal information (address, contact details, etc.) *
- ❏ ₃   Service buyback estimator / payment status *
- ❏ ₄   Survivor benefits estimator *
- ❏ ₅   Other (please specify): _____

*Levels marked with * are randomized*

Q3a *Show if Type 1 GoC Pension Centre*

Thinking back on your recent experience with the Government of Canada Pension Centre, how would you rate your satisfaction related to the following?
1. Ease of navigating the automated phone system *
2. The courteousness of staff *
3. The helpfulness of staff *
4. The knowledge level of staff *
5. The clarity of the information provided to you *
6. The timeliness of the service you received *

*Levels marked with * are randomized*

- ❍ 1   Very satisfied
- ❍ 2   Satisfied
- ❍ 3   Neutral
- ❍ 4   Dissatisfied
- ❍ 5   Very dissatisfied
- ❑ -8   Not applicable

Q3b *Show if Type 2 Online Portal*

Thinking back on your recent experience using the Online Pension Portal, how would you rate your satisfaction related to the following?
1. Ease of login *
2. Ease of Landing Page navigation *
3. Ease of self-service options *

*Levels marked with * are randomized*

- ❍ 1   Very satisfied
- ❍ 2   Satisfied
- ❍ 3   Neutral
- ❍ 4   Dissatisfied
- ❍ 5   Very dissatisfied
- ❑ -8   Not applicable

Q4

On a scale of one to 10, was the information you were provided, easy to understand? ***?***

? The information being referred to would be from the pension expert on the phone, or the information found on the portal.

- ❍ 10   10 - Easy to understand
- ❍ 9   9
- ❍ 8   8
- ❍ 7   7
- ❍ 6   6
- ❍ 5   5
- ❍ 4   4

❍ ₃   3

❍ ₂   2

❍ ₁   1 - Did not understand at all

❑ ₋₈   Not applicable

Q5

How would you rate your experience with the service you received?

❍ ₅   Very Satisfied

❍ ₄   Somewhat Satisfied

❍ ₃   Neither Satisfied nor Dissatisfied

❍ ₂   Somewhat Dissatisfied

❍ ₁   Very Dissatisfied

Q6

On a scale of 1 to 10, how likely would it be for you to use the following contact options if they were available:

1.   Accessing personal pension information from a home, personal laptop *
2.   Text (SMS) notices/reminders *
3.   Webchat/IM (Instant Messaging) with Pension Centre *
4.   Virtual meeting (Audio/Video call) with Pension Centre *
5.   Mobile application *

*Levels marked with * are randomized*

❍ ₁₀   10 - Very likely

❍ ₉   9

❍ ₈   8

❍ ₇   7

❍ ₆   6

❍ ₅   5

❍ ₄   4

❍ ₃   3

❍ ₂   2

❍ ₁   1 - Not likely at all

D1

What is your current status at the Government of Canada Pension Centre?

❍ ₁   Active (currently employed)

❍ ₂   Non-Active (retired)

❍ ₃   Survivor

❍ ₄   Other (please specify): _____

D2

What age group do you fall under?

- ⭕ 1   19 and under
- ⭕ 2   20 - 29
- ⭕ 3   30 - 39
- ⭕ 4   40 - 49
- ⭕ 5   50 - 59
- ⭕ 6   60 - 69
- ⭕ 7   70 or older
- ❏ -8   I prefer not to answer

D3

Do you belong to any of the following groups?

Select all that apply

- ❏ 2   Indigenous peoples *
- ❏ 3   LGBTQ2+ *
- ❏ 4   Persons with disabilities *
- ❏ 5   Members of a visible minority *
- ❏ 1   No, I do not belong to any of the following groups   *(Exclusive)*
- ❏ 7   Prefer not to answer   *(Exclusive)*

*Levels marked with * are randomized*

D4

Please identify your gender :

- ⭕ 1   Male
- ⭕ 2   Female
- ⭕ 3   Non-Binary
- ⭕ 4   Other (please specify): _____
- ❏ -8   Prefer not to answer

Q7a   *Show if Type 1 GoC Pension Centre*

Overall, what is the one thing you liked most about your interaction with the Government of Canada Pension Centre?

Please do not enter personally identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

_____
_____
_____
_____
_____

Q7b   *Show if Type 2 Online Portal*

Overall, what is the one thing you liked most about your interaction with the Online Pension Portal?

Please do not enter personally identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

_____
_____
_____
_____
_____

Q8a   *Show if Type 1 GoC Pension Centre*

Overall, what is the one thing you believe could be improved on most to make your interaction with the Government of Canada Pension Centre a more positive experience?

Please do not enter personally identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

_____
_____
_____
_____
_____

Q8b *Show if Type 2 Online Portal*

Overall, what is the one thing you believe could be improved on most to make your interaction with the Online Pension Portal a more positive experience?

Please do not enter personally identifying information (e.g., name, email address, phone number, mailing address), as anything you enter may be shared with the sponsor of this research.

_____
_____
_____
_____
_____

t1

You have now completed the survey. Thank you very much for your time.

Appendix H: French questionnaire

Sondage en ligne auprès des membres de Pension Canada

Gouvernment du Canada

Intro

Le ministre des Services publics et de l'Approvisionnement du Canada (SPAC) mène une étude pour en savoir plus sur votre expérience en tant que membre du régime de retraite lorsque vous accédez à nos services. Votre rétroaction est essentielle pour améliorer les services.

Note: Si vous devez remplir le sondage en plusieurs sessions, vous pouvez utiliser à nouveau le même lien et le sondage reprendra là où vous l'avez laissé.

Veuillez cliquer sur la flèche vers la droite pour continuer

Votre participation est volontaire et vos réponses resteront strictement confidentielles.

© 2022 Advanis Politique de confidentialité (https://www.advanis.net/fr/politique-de-confidentialit%C3%A9) Engagement du CRIC
 (https://www.canadianresearchinsightscouncil.ca/wp-content/uploads/2020/09/Engagement-du-CRIC-aupres-des-Canadiens.pdf)

Q2a   *Voir si Type 1 Centre des Pensions*

Quel était le but de votre appel au Centre des pensions?

Sélectionnez tout ce qui s'applique.

- ❏ 1   Versement de pension / Demander une estimation de ma pension *
- ❏ 2   Obtenir une mise à jour du statut d'un paiement de transfert (valeur de transfert, accord de transfert de pensions) *
- ❏ 3   Demander un devis de rachat et/ou appliquer au rachat de service *
- ❏ 4   Demander des renseignements généraux sur la pension, un formulaire ou de la documentation *
- ❏ 5   Mettre à jour mon profil (nom, adresse, informations bancaires, etc.) *
- ❏ 6   Événements de la vie (inscriptions, statut matrimonial, prestations supplémentaires de décès) *
- ❏ 97   Autre (veuillez préciser) : _____

*Les niveaux marqués d'un * sont présentés dans un ordre aléatoire*

Q2b   *Voir si Type 2 Portail en ligne*

Pour quelle raison avez-vous utilisé le portail de pension en ligne?

Sélectionnez tout ce qui s'applique.

- ❏ 1   Obtenir une estimation de pension *
- ❏ 2   Mettre à jour les informations personnelles (adresse, coordonnées, etc.) *
- ❏ 3   Estimateur de rachat de service / statut de paiement *
- ❏ 4   Estimateur de prestations de survivant *

❏ 5   Autre (veuillez préciser) : _____

Q3a   *Voir si Type 1 Centre des Pensions*

En pensant à votre expérience récente avec le Centre des pensions du gouvernement du Canada, comment évalueriez-vous votre satisfaction à l'égard des éléments suivants?

1. La facilité de navigation dans le système téléphonique automatisé *
2. La courtoisie du personnel *
3. La serviabilité du personnel *
4. Le niveau de connaissance du personnel *
5. La clarté des informations qui vous ont été données *
6. La ponctualité du service que vous avez reçu *

❍ 1   Très satisfait(e)
❍ 2   Satisfait(e)
❍ 3   Neutre
❍ 4   Insatisfait(e)
❍ 5   Très insatisfait(e)
❏ -8   Ne s'applique pas

Q3b   *Voir si Type 2 Portail en ligne*

En pensant à votre récente expérience d'utilisation du portail de pension en ligne, comment évalueriez-vous votre satisfaction pour chacun des éléments suivants?

1. La facilité de connexion *
2. La facilité de navigation sur la page d'accueil *
3. La facilité d'utilisation des options de libre-service *

❍ 1   Très satisfait(e)
❍ 2   Satisfait(e)
❍ 3   Neutre
❍ 4   Insatisfait(e)
❍ 5   Très insatisfait(e)
❏ -8   Ne s'applique pas

Q4

Sur une échelle de 1 à 10, les informations qui vous ont été fournies étaient-elles faciles à comprendre? ***?***

? L'information à laquelle nous faisons référence proviendrait de l'expert en retraite au téléphone ou de l'information trouvée sur le portail.

❍ 10   10 - Facile à comprendre
❍ 9   9
❍ 8   8
❍ 7   7

○ 6   6
○ 5   5
○ 4   4
○ 3   3
○ 2   2
○ 1   1 - Je n'ai pas du tout compris
❑ -8   Ne s'applique pas

Q5

Comment évalueriez-vous votre expérience avec le service que vous avez reçu?

○ 5   Très satisfait(e)
○ 4   Plutôt satisfait(e)
○ 3   Ni satisfait(e) ni insatisfait(e)
○ 2   Plutôt insatisfait(e)
○ 1   Très insatisfait(e)

Q6

Sur une échelle de 1 à 10, quelle est la probabilité que vous utilisiez les options de contact suivantes si elles vous étaient offertes :

1. Accéder aux renseignements personnels sur le régime de retraite à partir d'un ordinateur portable personnel *
2. Rappels/notifications par message texte (SMS) *
3. Webchat/messagerie instantanée avec le Centre des pensions *
4. Rencontre virtuelle (audio/vidéo) avec le Centre des pensions *
5. Application mobile *

Les niveaux marqués d'un * sont présentés dans un ordre aléatoire

○ 10   10 - Très probable
○ 9   9
○ 8   8
○ 7   7
○ 6   6
○ 5   5
○ 4   4
○ 3   3
○ 2   2
○ 1   1 - Pas du tout probable

D1

Quel est votre statut actuel au Centre des pensions du gouvernement du Canada?

○ 1   Actif (actuellement employé(e))
○ 2   Non-actif (retraité(e))

❍ 3   Survivant

❍ 4   Autre (veuillez préciser) : _____

D2

Dans quel groupe d'âge vous situez-vous?

❍ 1   19 ans ou moins

❍ 2   20 à 29 ans

❍ 3   30 à 39 ans

❍ 4   40 à 49 ans

❍ 5   50 à 59 ans

❍ 6   60 à 69 ans

❍ 7   70 ans ou plus

❑ -8   Je préfère ne pas répondre

D3

Appartenez-vous à l'un des groupes suivants?

Sélectionnez tout ce qui s'applique.

❑ 2   Autochtones *

❑ 3   LGBTQ2+ *

❑ 4   Personnes handicapées *

❑ 5   Membres d'une minorité visible *

❑ 1   Non, je n'appartiens à aucun de ces groupes   *(Exclusif)*

❑ 7   Je préfère ne pas répondre   *(Exclusif)*

*Les niveaux marqués d'un * sont présentés dans un ordre aléatoire*

D4

Veuillez identifier votre genre :

❍ 1   Homme

❍ 2   Femme

❍ 3   Non-binaire

❍ 4   Autre (veuillez préciser): _____

❑ -8   Préfère ne pas répondre

Q7a   *Voir si Type 1 Centre des Pensions*

Dans l'ensemble, quelle est la chose que vous avez le plus appréciée dans votre interaction avec le Centre des pensions du Gouvernement du Canada?

Veuillez ne pas entrer d'informations d'identification personnelle (par exemple, nom, adresse courriel, numéro de téléphone, adresse postale), car tout ce que vous entrez peut être partagé avec le commanditaire de cette recherche.

_____
_____
_____
_____
_____

Q7b   *Voir si Type 2 Portail en ligne*

Dans l'ensemble, quelle est la chose que vous avez le plus appréciée dans votre interaction avec le portail de pension en ligne?

Veuillez ne pas entrer d'informations d'identification personnelle (par exemple, nom, adresse courriel, numéro de téléphone, adresse postale), car tout ce que vous entrez peut être partagé avec le commanditaire de cette recherche.

_____
_____
_____
_____
_____

Q8a   *Voir si Type 1 Centre des Pensions*

Dans l'ensemble, qu'est-ce qui pourrait être amélioré le plus pour faire de votre interaction avec le Centre des pensions du Gouvernement du Canada une expérience plus positive?

Veuillez ne pas entrer d'informations d'identification personnelle (par exemple, nom, adresse courriel, numéro de téléphone, adresse postale), car tout ce que vous entrez peut être partagé avec le commanditaire de cette recherche.

_____
_____
_____
_____
_____

Q8b   *Voir si Type 2 Portail en ligne*

Dans l'ensemble, qu'est-ce qui pourrait être amélioré le plus pour faire de votre interaction avec le portail de pension en ligne une expérience plus positive?

Veuillez ne pas entrer d'informations d'identification personnelle (par exemple, nom, adresse courriel, numéro de téléphone, adresse postale), car tout ce que vous entrez peut être partagé avec le commanditaire de cette recherche.

_____

_____

_____

_____

_____

t1

Vous avez maintenant terminé le sondage. Merci beaucoup pour votre temps.