



Customer Service Commissioner  
NEW SOUTH WALES

# NSW Whole-of-Government Customer Satisfaction Measurement Survey

## 2015 Detailed Report

November 2015



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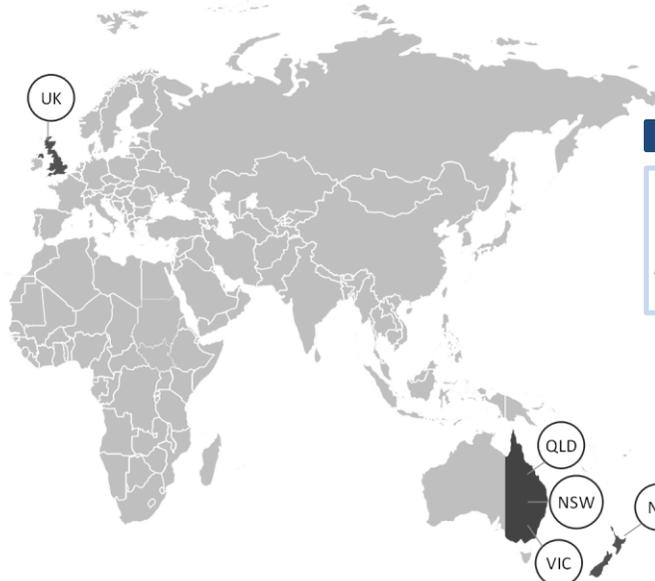
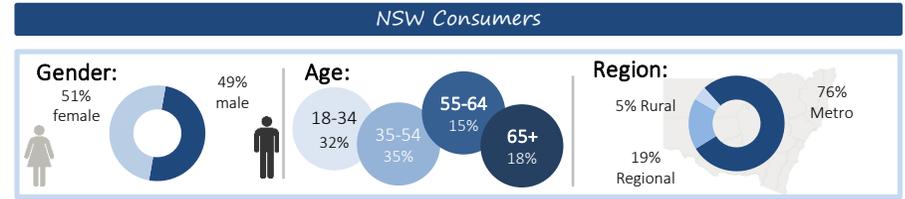
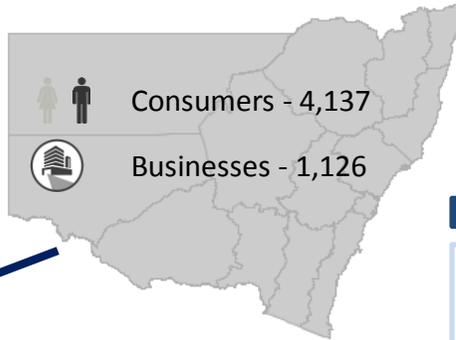
Note : The insights from the Business respondents are shown selectively where the results differ significantly from the consumer insights



# Executive Summary



# Who did we talk to and how...

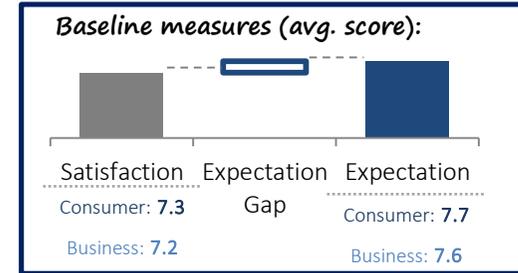


# What did they say...



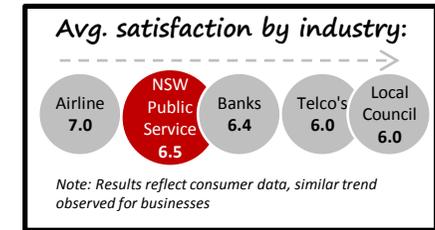
## Performance of NSW Government services against baseline measures

Customers overall have positive perceptions of NSW Government services, however satisfaction with the experience delivered by NSW Government services is slightly below customers' expectations.



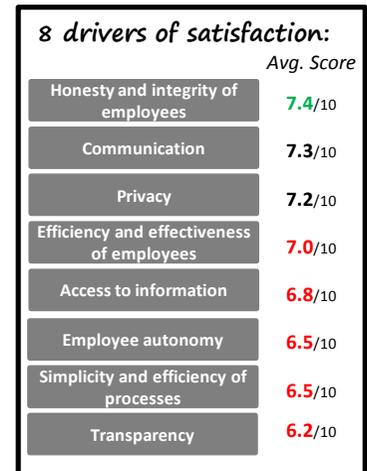
## Perceptions of the NSW Public Sector 'brand'

Customers rate their satisfaction with the NSW Public Service 'brand' favourably compared to other industries, but gave significantly lower scores for the 'brand' than for NSW Government services overall.



## What drives satisfaction

There are eight key drivers of customer satisfaction with services relating to employees, processes, and goals. Satisfaction is linked with perceptions of service quality and accountability, indicating that they are related outcome measures rather than drivers of satisfaction.



## Comparison of Scores Across Jurisdictions

Compared to other jurisdictions, NSW is performing similarly across the baseline measures. Further analysis shows differences in performance across jurisdictions by services and channels, which present opportunities for cross-jurisdiction learnings, examples include: i) UK and QLD Pubic Housing, ii) UK Digital Services, and iii) NZ Documentation Services.



# What areas do we need to focus on to get the biggest improvements...

## 1 Our Customers

**“Encourage public participation in decision-making” and handle complaints well...**

Consumers and businesses do not believe we encourage participation and over 30% of consumers and businesses rate our complaint handling process as poor.

## 2 Our People

**“Seeing things from my perspective”... “Get things done as quickly as possible”**

Common elements between businesses and consumers is the inability for NSW Government employees to do this.

## 3 Our Processes

**“Processes are easy to understand”... “I can get to the right person the first time”**

Are the lowest performing process attributes for both businesses and consumers.

Insights to Action

We will:

1. Improve the complaint handling experience and be more transparent.
2. Improve the efficiency and effectiveness of employees.
3. Improve the simplicity and efficiency of processes and access to information.



# Background and Approach



## Background

The Customer Satisfaction Measurement Survey has been developed over the last few years to support a continued focus on improving customer service by creating a common understanding of how the NSW Government is providing customer service and what areas can be improved.

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Improving customer satisfaction with key government services is one of the Premier's Priority in the NSW State Plan.

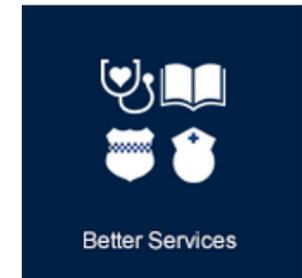
Research into the relationship between service performance and customer experience highlights that high-performing agencies tend to deliver superior customer experiences because they put effort into understanding customer needs.

Many NSW Government agencies are actively seeking customer feedback in order to improve their services. These assessments of service delivery have typically been conducted within individual agencies or on a program-by-program basis. Much of this feedback is "in the moment" during service delivery and provides important information for Agencies to continue shaping and refining their strategies.

The development of a NSW whole-of-government Customer Satisfaction Measurement Survey is an important step in continuing to improve customer service by creating a common understanding of how the NSW Government is providing customer service and what areas can be improved. It provides a comprehensive, independent and uniform means of assessing customer perceptions of the overall performance of NSW Government and the quality of service delivered.

The survey was developed in 2013 after which the methodology was piloted in 2014 with 6,208 customers. The results were published in last year's State of the Sector report. In 2015, the results of the pilot were reviewed and the improved instrument was implemented via an online survey with 5,263 customers. This report outlines the results of this survey.

The findings of this report will be used to shape and inform whole-of-government recommendations to provide a co-ordinate approach to drive forward customer satisfaction.



# Objectives

The Customer Satisfaction Measurement Survey methodology has been developed to provide scores for whole-of-government customer satisfaction and will be used to gauge future performance and the success of citizen-centric reforms from the customer’s perspective.

The Customer Satisfaction Measurement Survey has been designed to provide an understanding of:

- How NSW Government services are performing overall from the customers’ perspective, and with respect to other jurisdictions
- How NSW Government services are performing against important attributes of the customer experience relating to employees, values, processes and goals
- The drivers of satisfaction and focus areas for improvement at a whole-of-government level and how these vary across services
- A holistic view of the quality of service delivered by NSW Government services through the development of a whole-of-government customer satisfaction index.

The Customer Satisfaction Index will also be used as means of measuring against the Premier’s 12<sup>th</sup> priority within the State Plan which is to ‘improve customer satisfaction with key government services every year, this term of government’.

A high-level outline of the survey structure and questions asked to support these research objectives is displayed to the right.

All questions were asked and are presented as scores out of 10 with the exception of the Customer Satisfaction Index which is calculated out of 100. All responses in this report are reported as an average across all respondents or are grouped into percentages according to a balanced scale of 1-4, 5-6, and 7-10.

## Structure of the Customer Satisfaction Measurement Survey aligned to the research objectives

Survey sections	Sample questions
Profile and use of government services	<ul style="list-style-type: none"> <li>• Age, gender, region where live/work</li> <li>• Which government services have you ever had direct dealings with in the last 12 months?</li> </ul>
Use of and satisfaction with digital services	<ul style="list-style-type: none"> <li>• Which contact methods were used when carrying out direct dealings with services?</li> <li>• If online... which device was used? How satisfied were you with elements of the experience?</li> <li>• If not online, why not?</li> <li>• What is your preferred contact method for carrying out direct dealings in the future?</li> </ul>
Measures to assess overall service quality	<ul style="list-style-type: none"> <li>• How would you rate your expectation of overall quality of service?</li> <li>• How satisfied would you say you are with each of the following services in NSW?</li> <li>• Please imagine an ideal service. How well do you think each service in NSW compares with that ideal service?</li> </ul>
Perceptions of services	<ul style="list-style-type: none"> <li>• Thinking now about its employees, to what extent do you agree or disagree that the following statements describes the service?</li> <li>• And now thinking about its processes, to what extent do you agree or disagree that the following statements describes the service?</li> <li>• Thinking about the services they provide overall, how would you rate the service on the following (goals)?</li> <li>• Thinking about the values that they uphold, to what extent would you agree with the following statements when thinking about the service?</li> </ul>
Perceptions of public service overall	<ul style="list-style-type: none"> <li>• Which of the following would you use to describe the Public Service overall? (List of positive and negative attributes)</li> <li>• Thinking about all your experiences with the following Australian industries over the previous 12 months, how satisfied would you say you are with them? (Banks, Telco’s, airlines, local council, energy)</li> </ul>
Complaints experiences	<ul style="list-style-type: none"> <li>• When did you last complain about a service?</li> <li>• Which service did you complain to?</li> <li>• How well or poorly was your most recent complaint handled?</li> <li>• How difficult or easy was it to make your complaint?</li> </ul>



# Scope of Research

The Customer Satisfaction Measurement Survey captures customer feedback on twenty-one different NSW Government services which have been aggregated to provide a view of whole-of-government performance.

‘Customers’ in this survey are consumers and businesses that have had direct dealings with services provided by the NSW Government in the last 12 months.

This 12 month timeframe ensures experiences were sufficiently recent for customers to provide accurate feedback and is in line with yearly implementation of the survey.

The survey captures customer feedback on twenty-one different NSW Government services, described in the customer’s language. Feedback received from customers about each of the individual services have been aggregated to provide a view of the performance of NSW Government services overall.

Each respondent to the survey provided feedback about 1 or 2 services. As a result, the total number of responses received across services is greater than the total number of customers who completed the survey. Throughout the report, sample sizes have been reported based on the total number of responses (rather than the total number of respondents).

The results for services that were most commonly interacted with (e.g. Public Transport) in the last 12 months were given a greater weighting to whole-of-government scores. This is to allow for the whole-of-government scores to reflect the services in a correct proportion, with higher weighting given to those services which consumers interact with more frequently.

## In scope services

### Industry, Trade and Regional Development

- Agriculture advice and funding services.
- Business Advisory Services
- Water Supply

### Justice

- Police
- State Emergency Services
- Prisons
- Courts
- Fire Brigade
- Art Galleries and Museums

### Family & Community Services

- Public Housing
- Disability Services
- Child Welfare Services
- Services for Older People

### Transport

- Public Transport
- Car and Boat Registration
- Major Roads

### Education & Training

- Public Schools and TAFE

### Health

- Public Hospitals and Ambulance Services

### Finance, Services & Innovation

- Consumer Affairs (Fair Trading)

### Planning & Environment

- Environment and wildlife protection

### Multiple clusters

- Documentation services (incl. certificates for births deaths and marriages; trade licenses and certificates; and drivers licenses)



# Approach to Data Collection and Jurisdictional Benchmarking

Identical surveys were undertaken with customers in New South Wales, Victoria, Queensland, the United Kingdom and New Zealand to enable comparative cross-jurisdiction analysis.

Identical surveys were undertaken with customers in New South Wales, Victoria, Queensland, the United Kingdom and New Zealand (sample sizes for the total number of businesses and consumers surveyed by jurisdiction are shown to the right).

The survey was targeted to achieve a representative sample of the general population in each jurisdiction based on age, gender and region (metropolitan, regional and rural) and a representative sample of the business community based on location and size (number of employees). Service names were localised to ensure respondents selected appropriately.

All surveys were completed over a consistent time period from 21 May 2015 to 4 June 2015 and results are therefore reflective of experiences with services across jurisdictions over the 12 months prior, from May 2014-May 2015.

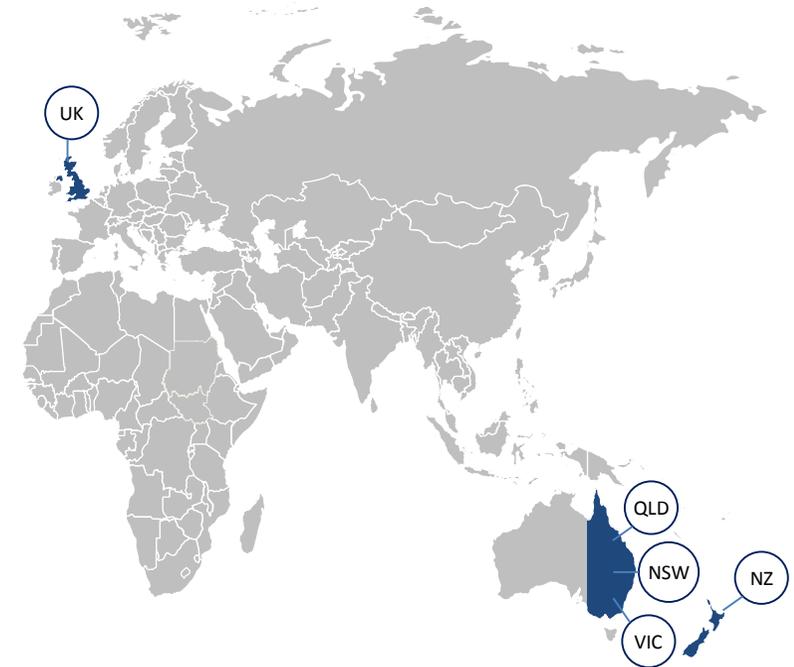
The purpose of undertaking identical surveys across jurisdictions was to apply a consistent methodology for measuring the quality of services delivered by governments to enable comparative cross-jurisdiction analysis.

When comparing scores across jurisdictions, the following should be taken into account:

- There are significant variations in the composition of government services across jurisdictions
- There are differences in government structures across jurisdictions impacting accountability and responsibility for comparable services
- Expectations of government services and the types of customers who interact with services may vary significantly by jurisdictions, impacting results.

## 2015 survey sample size

Jurisdictions	Consumer (n=)	Business (n=)	Total (n=)
New South Wales	4,137	1,126	5,263
Victoria	2,046	712	2,758
Queensland	2,072	673	2,745
United Kingdom	2,205	543	2,748
New Zealand	2,136	584	2,720



## Further Qualitative Research

Qualitative research was also undertaken with customers in NSW to compliment the online survey, providing additional context around insights and reaffirming information for select services which had a small sample of responses.

Following the online survey, qualitative research via focus groups was undertaken in order to:

- Further understand what is driving a gap between satisfaction and expectation for services that had a large ‘expectation gap’
- Understand what improvements could be made to bring satisfaction in line with expectations for services that had a large ‘expectation gap’
- Provide interpretation of what individual drivers of satisfaction mean to customers within the context of services
- Verify drivers of satisfaction and their relative importance to customers for select services which received a small sample of responses (less than 30 such as Agricultural Advice, Business Advisory Services and Prisons).

In line with the research objectives, seven focus groups were held for a cross-section of services across regions.

Focus groups were run over the period of 10 July 2015 to 16 July 2015 and were targeted to achieve a mix of ages (where appropriate), gender and experiences interacting with services.

Findings from the qualitative research have been integrated throughout the report within quotes “  ” to support and supplement the analysis.

### Scope of qualitative research

		Services			
		Services for Older People	Business Advisory Services	Justice services (Police, Courts)	Major Roads
Region	Sydney (CBD)	1 x group	1 x group	1 x group	1 x group
	Western Sydney (Parramatta)		1 x group		
	Wollongong	1 x group		1 x group	



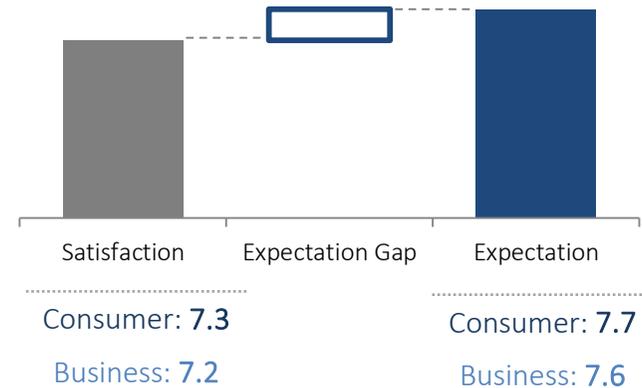
# Key Findings



# Key Finding 1: Customers experiences with NSW Government services are positive, however are below expectations.

There are positive perceptions of NSW Government services in the community with average satisfaction of 7.3 out of 10 for consumers and 7.2 out of 10 for businesses.

However, satisfaction is slightly below customers' expectations (7.7 out of 10 for consumers; 7.6 out of 10 for businesses).



## 2015 Customer Satisfaction Index

The NSW Customer Satisfaction Index provides a more complete picture on Government performance in service delivery rather than a standalone 'customer satisfaction' metric by taking into account satisfaction and gaps to expectation and an 'ideal' service.

The NSW Customer Satisfaction Index score is 76.7 out of 100 for consumers and 76.6 out of 100 for businesses in 2015.

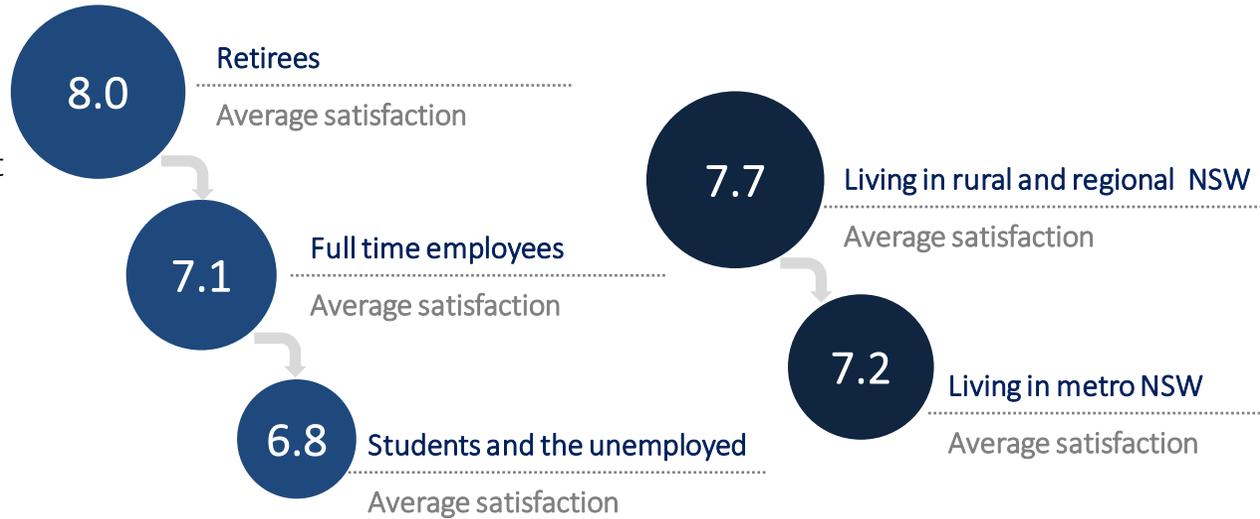


 Refer to section 1 of detailed findings for further information

## Key Finding 2: Customer Satisfaction Varies by Demographics.

More positive perceptions of NSW Government services tend to be held by older, retired consumers living in regional areas.

Students and consumers who are unemployed tend to have more negative perceptions of NSW Government services.



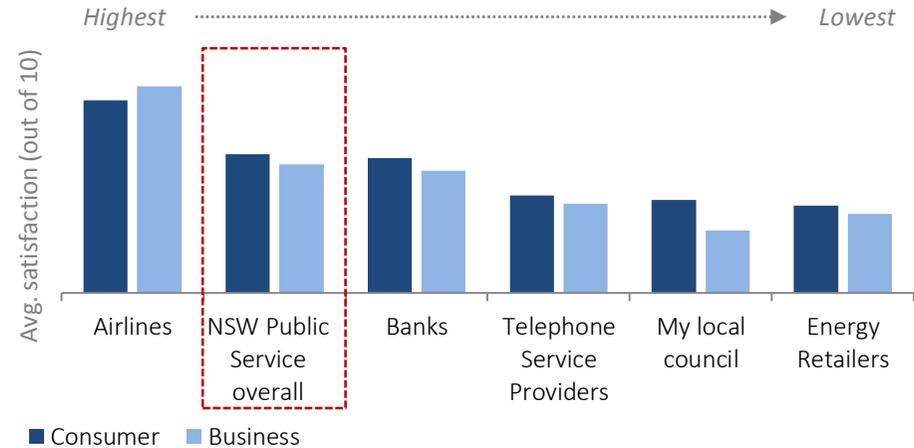
Smaller businesses and businesses located in rural areas are also more satisfied.



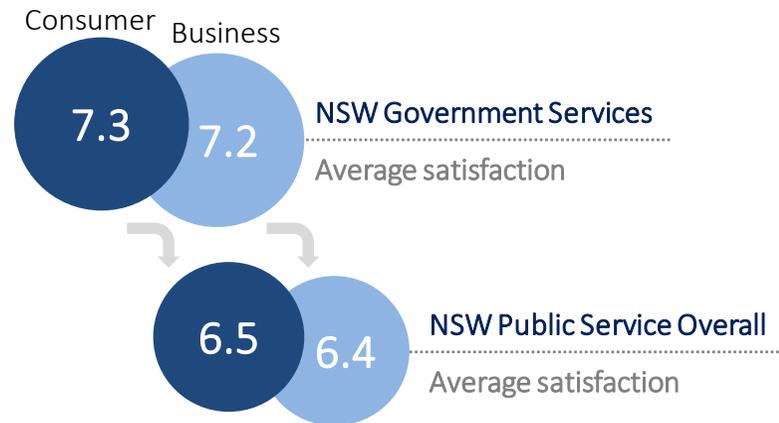
Refer to section 1 of detailed findings for further information

### Key Finding 3: Satisfaction with the NSW Public Sector ‘brand’ compares favourably with other industries, however is lower than scores for NSW Government services overall.

Satisfaction with the NSW Public Sector ‘brand’ is on par with banks but behind airlines.



Satisfaction with NSW Public Sector ‘brand’ is significantly less than with NSW Government services overall highlighting a disconnect between customers’ experiences of service delivery.



Refer to section 1 of detailed findings for further information

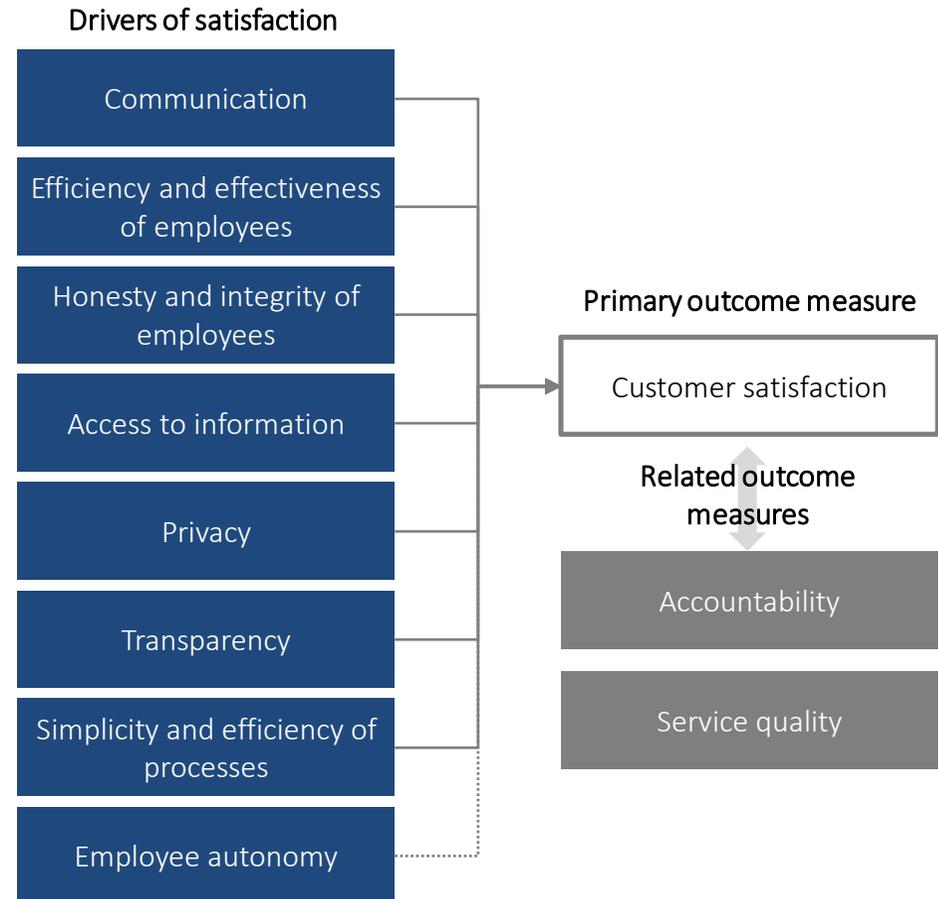
## Key Finding 4: There are eight key drivers of customer satisfaction with services relating to employees, processes, access to information, transparency and privacy

There research has identified eight key drivers of customer satisfaction with NSW Government services :

1. Communication
2. Efficiency and effectiveness of employees
3. Honesty and integrity of employees
4. Access to information and online services
5. Privacy
6. Transparency (i.e. open and encouraging of public participation in decision making)
7. Simplicity and efficiency of processes
8. Employee autonomy

Customer satisfaction is intrinsically linked with perceptions of service quality and accountability suggesting these should be viewed as a group of related outcome measures.

The drivers and related outcome measures have been identified based on statistical groupings of twenty-nine attributes related to NSW Government employees, values, processes and goals.



Refer to section 2 of detailed findings for further information

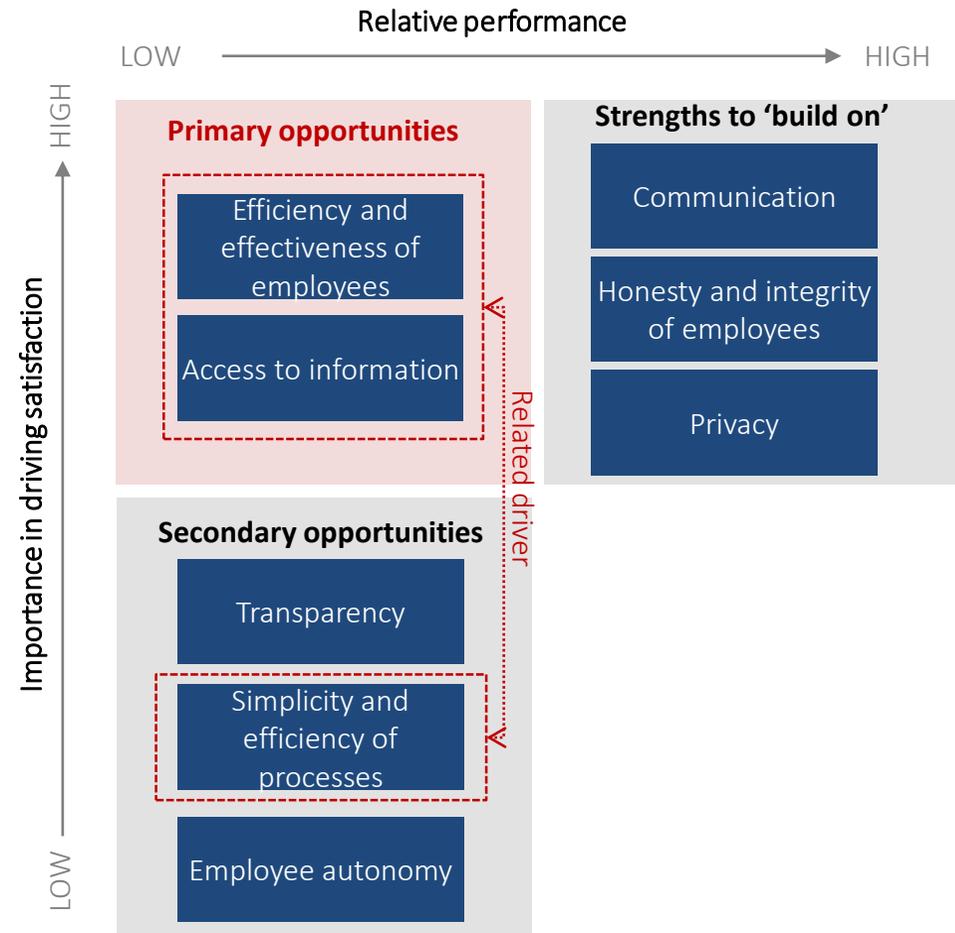
## Key Finding 5: Of the eight satisfaction drivers, efficiency and effectiveness of employees (related to simplicity and efficiency of processes) and access to information are primary opportunities to drive increases in satisfaction.

Analysis of the importance of these drivers in determining satisfaction and their current performance reveals:

- Efficiency and effectiveness of employees and access to information and online services are primary opportunity drivers for increasing satisfaction as they are of high importance in driving customer satisfaction and their perceived performance is lower
- Simplicity and efficiency of processes is a related opportunity for improvement as perceived performance today is lower and satisfaction with this driver is strongly related to efficiency and effectiveness of employees, and access to information

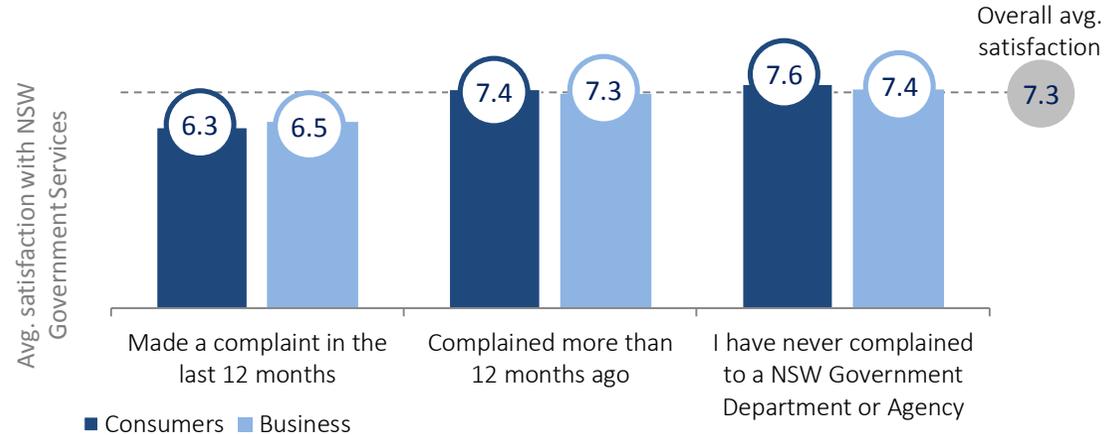


Refer to section 2 of detailed findings for further information

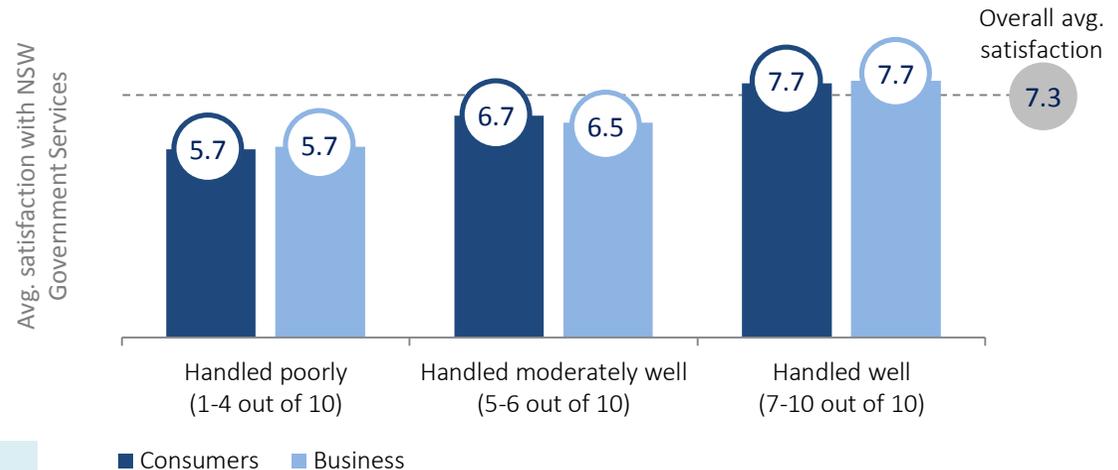


## Key Finding 6: Customers' complaints handling experiences impact satisfaction and customers who have had their complaints handled well have above average satisfaction.

Customers' complaints experiences have a high impact on their satisfaction with NSW Government services overall.



Customers who had their complaints handled well have higher than average satisfaction with NSW Government services suggesting there is opportunity to improve complaints handling to support increased satisfaction.

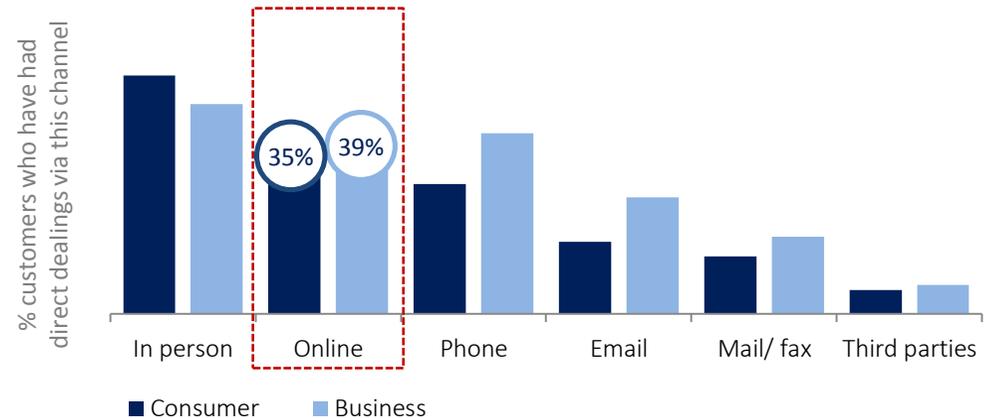


Refer to section 3 of detailed findings for further information



## Key Finding 7: Customers' needs for improved access and simplicity and efficiency in processes can be enhanced through online services which are delivering positive experiences.

Online is the second most common channel through which consumers have had direct dealings with NSW Government services and third for businesses.



Customers who have accessed NSW Government services online are more satisfied than those who have used other channels, linked to shorter wait times and simpler processes. This is particularly evident in transactional services such as car and boat registration.



Refer to section 4 of detailed findings for further information

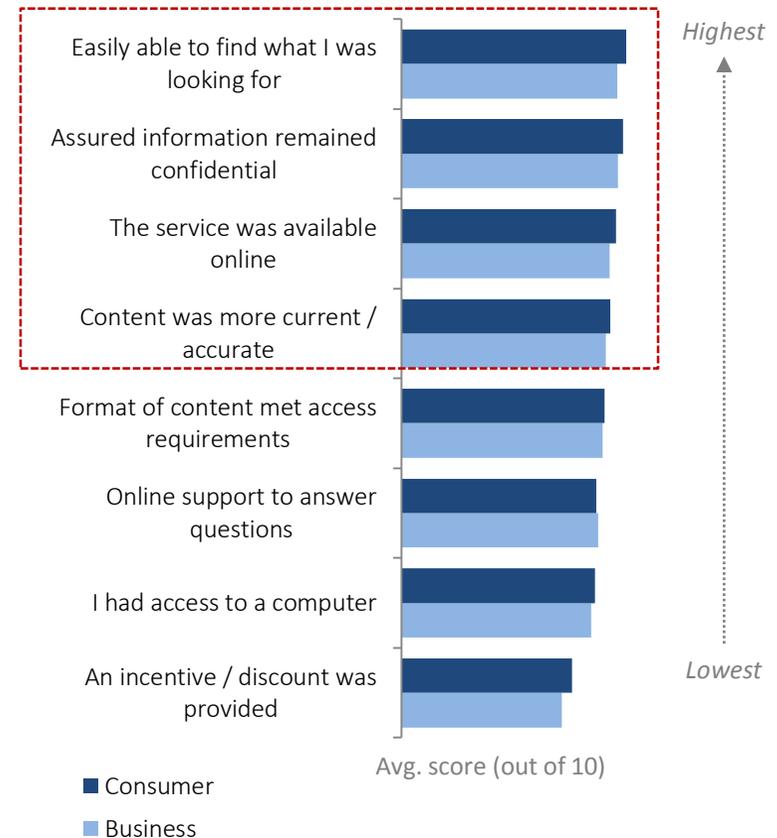
## Key Finding 8: Improvements to navigation, security and content are most likely to increase usage of online services.

Customers who had not gone online to carry out direct dealings with NSW Government services in the last 12 months were asked to rate their level of agreement that certain improvements would encourage them to go online.

The results indicate that customers who currently use other channels would be more likely to go online if navigation was improved, followed by security, access currency and accuracy of content.

Incentives, such as a discount are least likely to increase adoption overall.

Likelihood to go online if...



Refer to section 4 of detailed findings for further information

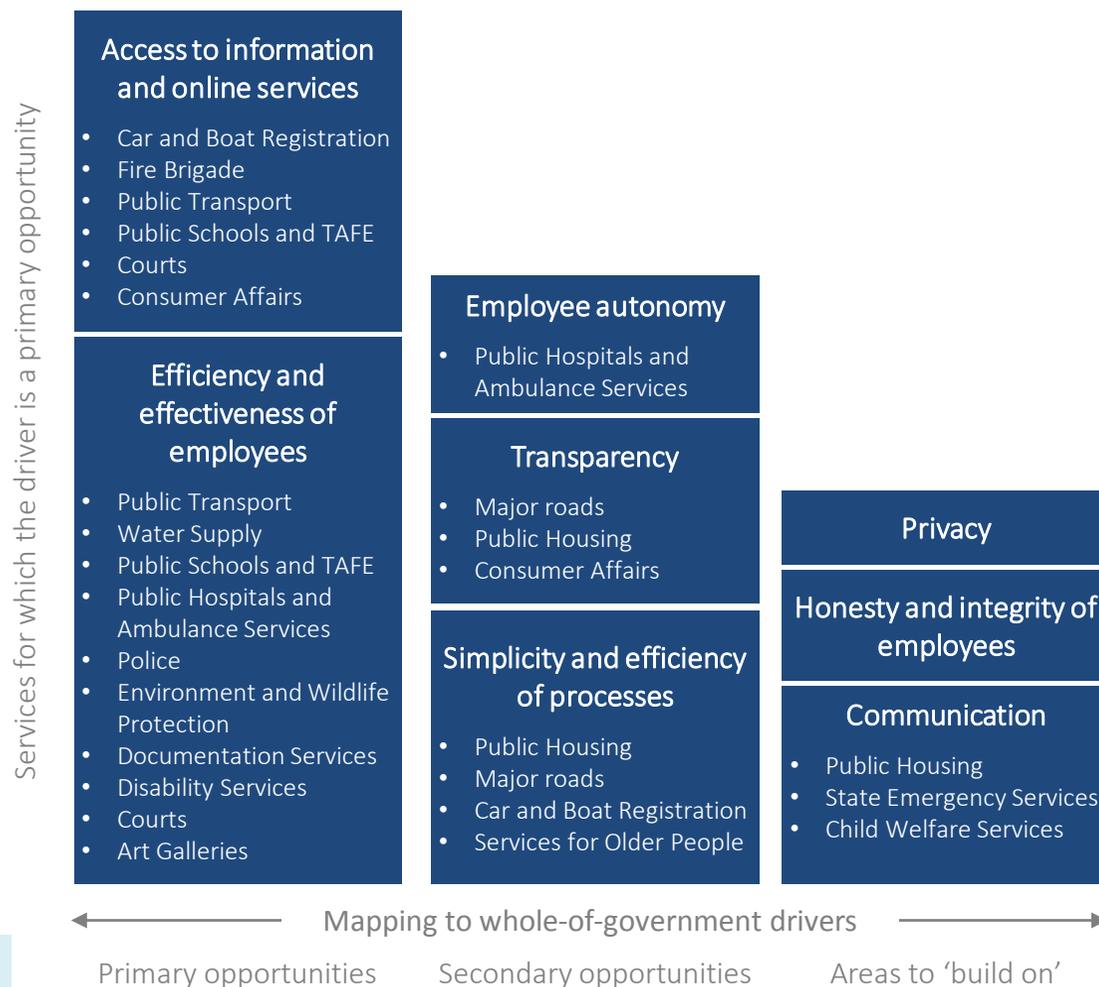


## Key Finding 9: The relative priority of satisfaction drivers varies across services implying a need for targeted service actions to support whole-of-government outcomes.

While common satisfaction drivers have been identified for whole-of-government, the relative importance of satisfaction drivers vary across services. This implies a need for targeted service priorities to support whole-of-government outcomes.

Individual service analysis has been undertaken to highlight differing priority areas for each cluster. Refer to the detailed report for further analysis.

For example, ‘communication’ has been identified as an area to build on across whole-of-government, however is a primary opportunity to improve satisfaction for Public Housing, State Emergency Services and Child Welfare Services.

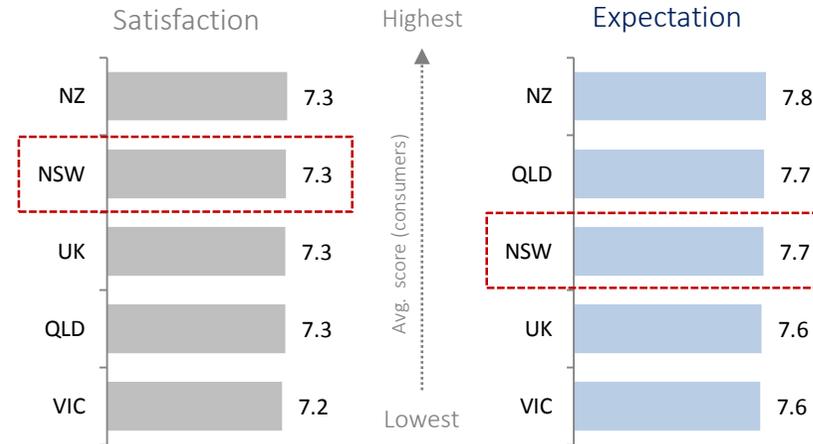


Refer to section 5 of detailed findings for further information

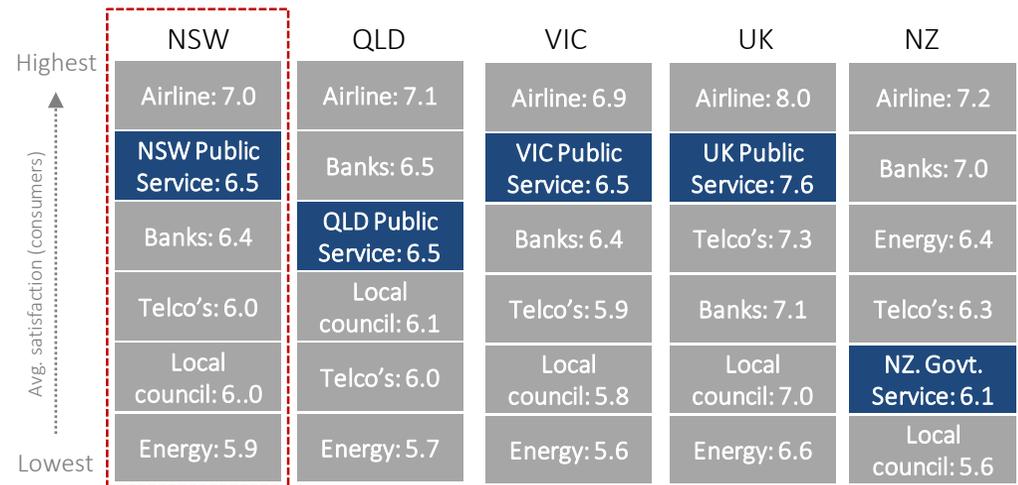
# Key Finding 10: Compared to other jurisdictions, NSW Government services overall are performing on par, however differences appear in 'brand' scores and by services and channels .

Compared to other jurisdictions, NSW Government services overall are performing on par in satisfaction and delivering to expectations.

While there are minimal differences in overall performance at the whole-of-government level across jurisdictions, further analysis shows differences in performance across jurisdictions by services and channels, which may present opportunities for cross-jurisdiction learnings (refer to detailed findings).



NSW Government has a positive 'brand' perception when compared to other industries, which is on par with the brand perception of the UK public service, VIC and QLD within the context of the other industries in those markets, but ahead of NZ.



Refer to section 6 of detailed findings for further information

# Detailed Findings

1. Overall performance - *Key Findings 1, 2 and 3*

2. Performance against customer satisfaction drivers - *Key Findings 4 and 5*

3. Complaints handling - *Key Finding 6*

4. Perceptions of online services - *Key Findings 7 and 8*

5. Variation in performance across services – *Key Finding 9*

6. Comparison of performance to other jurisdictions – *Key Finding 10*



## Areas covered in this section

1. Performance of NSW Government Services Against Measures.....p. 25
2. Differences in Customer Satisfaction by Demographics.....p. 28
3. Perceptions of the NSW Public Sector 'brand' .....p.30

## Detailed Summary Findings

- Overall, results indicate there are positive perceptions of NSW Government services in the community with average satisfaction of 7.3 out of 10 for consumers and 7.2 out of 10 for businesses.
- However, satisfaction with the experience delivered by NSW Government services is slightly below customers' expectations (7.7 out of 10 for consumers; 7.6 out of 10 for businesses).
- The composite customer satisfaction index score (combining satisfaction, gap to expectation and perception of closeness to the ideal service) for 2015 is 76.7 out of 100 for consumers and 76.6 out of 100 for businesses.
- More positive perceptions of NSW Government services are held by older, retired consumers living in regional areas and smaller businesses located in rural and regional areas. Students and consumers who are unemployed have more negative perceptions of NSW Government services.
- When asked to rate their satisfaction with the NSW Public Service 'brand' compared to other industries, customers gave significantly lower scores than in comparison with NSW Government services overall (6.5 out of 10 for consumers; 6.4 out of 10 for businesses), highlighting a disconnect between customers' experiences of service delivery (rating higher) and their perceptions of the NSW Public Service overall (rating lower).
- The disconnect between service experiences and 'brand' is further supported by customers who are satisfied with NSW Government services ascribing negative descriptors to the NSW Public Service 'brand'.

### Key Findings Covered in this Section:

**Key Finding 1:** Customers experiences with NSW Government services are positive, however are below expectations.

**Key Finding 2:** Customer Satisfaction Varies by Demographics

**Key Finding 3:** Satisfaction with the NSW Public Sector 'brand' compares favourably with other industries, however is lower than with NSW Government services overall.



# Customer Views on Satisfaction and Expectation

Results against the measures of satisfaction and expectation indicate positive perceptions of NSW Government services.

Customers identified positive perceptions of their recent experience with NSW Government services, with 71% of consumers and 72% of businesses indicating they are satisfied with the services they have had direct dealings with in the last 12 months (refer to Figure 1).

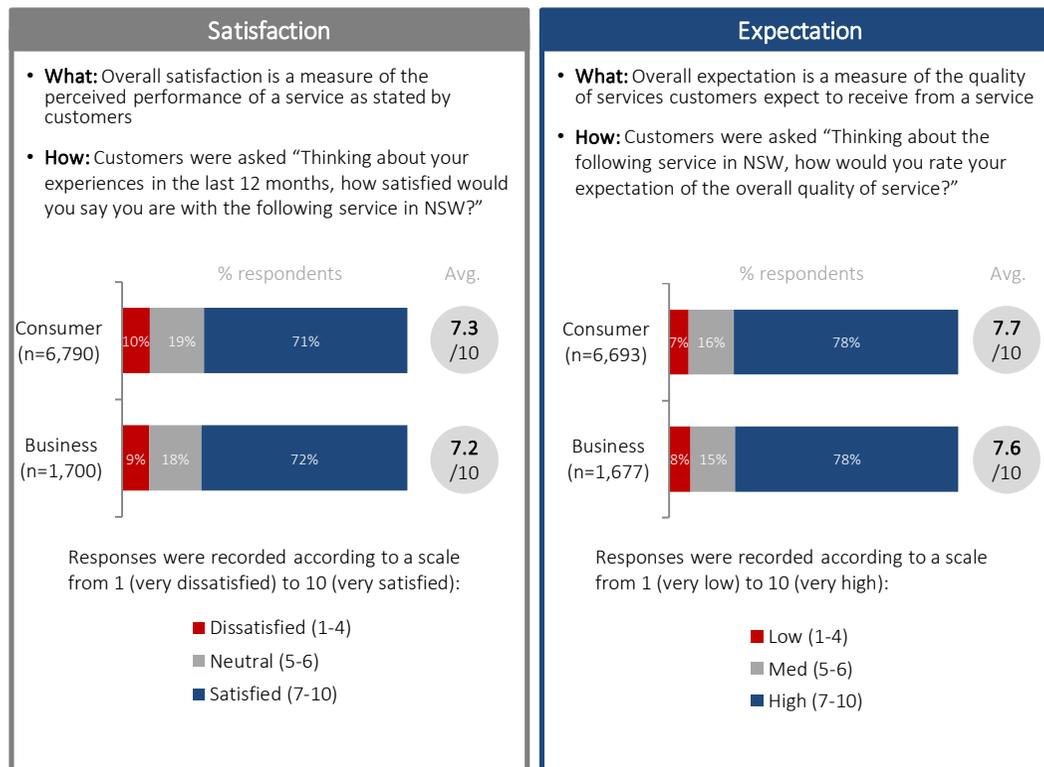
78% of consumers and businesses also indicate they have high expectations of NSW Government services, suggesting their previous experiences (prior to the last 12 months) have also been positive (refer Figure 1).

Satisfaction and expectations are positively related (correlation of 0.77 for consumers and 0.80 for businesses). The more satisfied customers become with government services they interact with, the higher their expectations are for future interactions.

“ When I went to [department] recently, *it was easy*.. I had to wait but it didn't bother me.. they got back to me and were able to help me with what I needed. ”

“ No one gets back to you.. People are so busy and things get missed. ”

Figure 1: NSW consumer and business satisfaction and expectation



# Performance of Services Compared to Expectations and Ideal Services

While there are positive perception of experiences, services are not delivering to current expectations nor to customers perceptions of an ideal service.

Satisfaction with the experience delivered by NSW Government services (average score of 7.3 for consumers and 7.2 for businesses) is below expectations (average score of 7.7 for consumers and 7.6 for businesses).

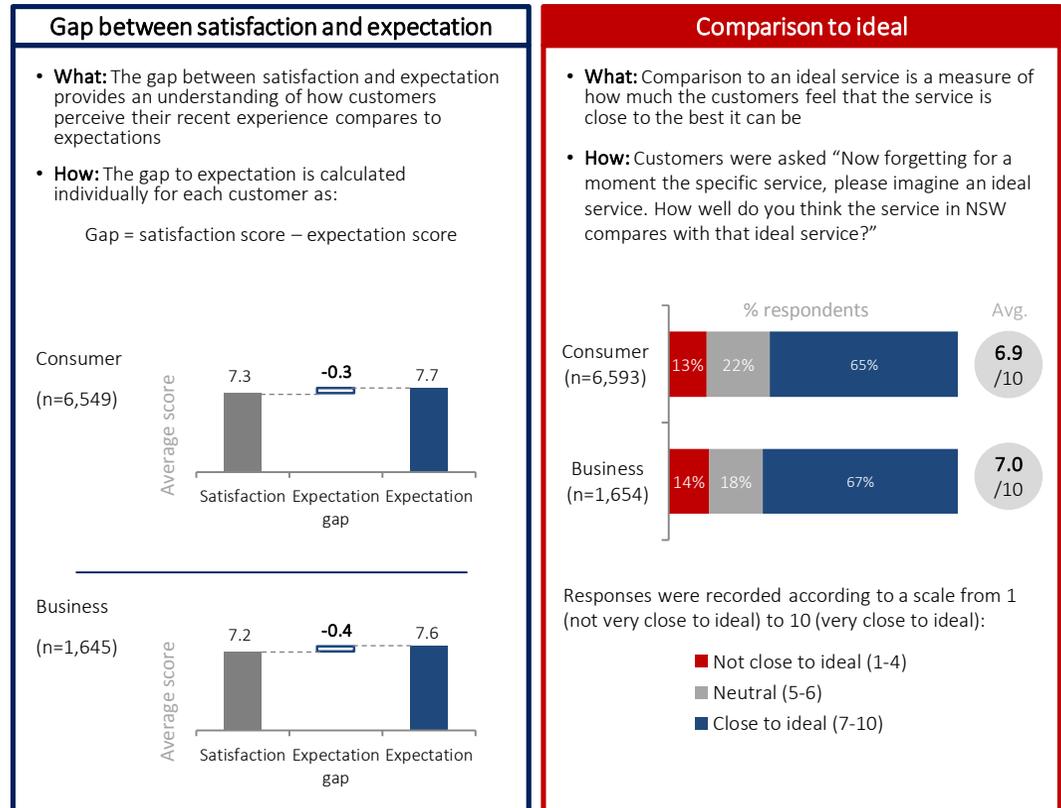
The average gap between satisfaction and expectation is -0.3 for consumers and -0.4 for businesses (refer Figure 2).

There was a further gap between customers' experiences and their ideal service with only 65% of consumers and 67% of businesses agreeing that the service they received is close to their 'ideal' experience.

“ I expect staff to be responsive by answering questions in a timely and accurate manner... however, some staff lack sufficient knowledge to provide effective responses to queries resulting in customers being palmed off from person to person. ”

“ I expect to be offered services that are in touch with client needs and are accessible and available to everyone who needs it... however, service quality, availability and awareness is inconsistent. ”

Figure 2: Comparison of current NSW Performance to expectations and perceptions of an ideal service



# The NSW Customer Satisfaction Index

The three measures of satisfaction, gap to expectation and gap to an ‘ideal’ service are combined to create a composite customer satisfaction index measure which provides a holistic understanding of customer perceptions of the quality of NSW Government service delivery.

The NSW Customer Satisfaction Index provides a more complete picture on government performance in service delivery rather than a standalone ‘customer satisfaction’ metric.

Results show the NSW Customer Satisfaction Index score is 76.7 out of 100 for consumers and 76.6 out of 100 for businesses (refer to Figure 3).

The index has been designed based on the American Customer Satisfaction Index (ACSI) using a proven approach to customer experience measurement.

The Customer Satisfaction Index is calculated as an average across the following three components (refer to Figure 4 for further detail):

1. Overall satisfaction with a NSW Government Service
2. A calibrated gap between satisfaction and expectation for a NSW Government Service which incorporates information about whether expectations have been met, with sensitivity when performance is below expectations but not when expectations are exceeded.
3. How the current NSW Government Service compares to a customers perceived ‘ideal’ service.

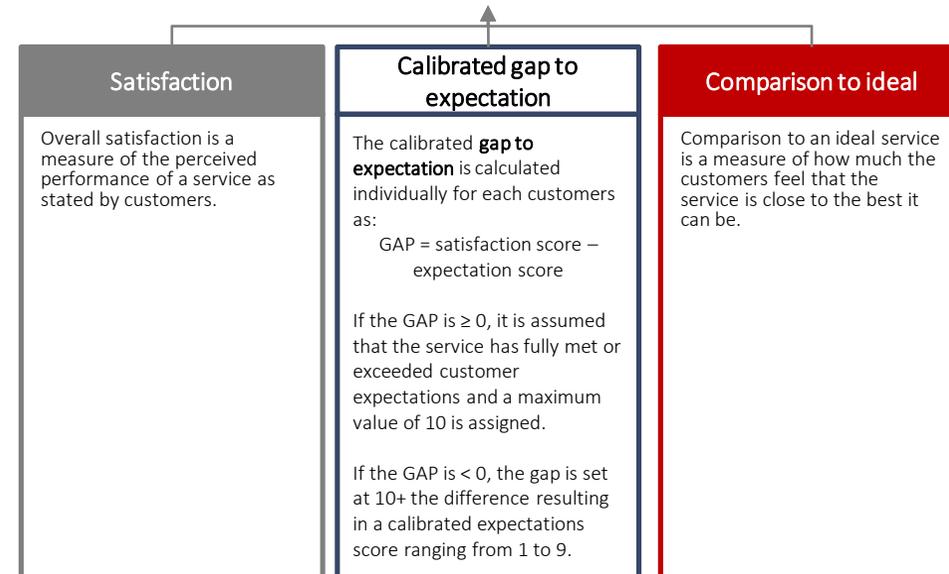
An individual score across these three components is calculated for each respondent and rebalanced to be on a scale of 0 to 10 in line with the ACSI methodology. Each individual score is then averaged across the total population to provide a whole-of-government measure.

Figure 3: Customer satisfaction index score for 2015



Figure 4: Customer satisfaction index methodology diagram

The **Customer Satisfaction Index** is measured as the average of the following scores recalibrated to be on a scale of 0-10 to be in line with the ACSI methodology.



# Differences in Satisfaction by Consumer Demographics

Older, retired consumers living in regional areas are more satisfied with the NSW Government services they interact with while students and consumers who are unemployed have more negative perceptions.

	Demographic characteristics	Significance of differences identified <sup>1</sup>	
Consumer	Age	Significant	<p><b>Age</b></p> <p>Across the NSW citizen population, consumers who are older (aged 55+) and/or are retired are more satisfied with the NSW Government services they have had direct dealings with (average satisfaction of 7.8 for consumers aged 55+ compared to 7.0 for those under 55 years of age), with 73% agreeing their experience is close to an imagined 'ideal' service (compared to 59% for consumers under 55 years of age).</p> <p><b>Region</b></p> <p>Overall satisfaction with NSW Government services is higher for consumers in regional and rural areas compared to metro areas (average satisfaction of 7.7 and 7.6 for rural and regional respectively compared to 7.2 for metro) as are expectations of the overall quality of service (average score of 8.2 and 7.9 for rural and regional respectively compared to 7.6 for metro). The gap to expectation however does not vary significantly by region.</p> <p><b>Employment Status</b></p> <p>Students and people who are unemployed or not working are less satisfied with the NSW Government services they use (average satisfaction of 6.8 for students and the unemployed compared to 7.4 for consumers with other employment statuses) and fewer agree their experience is close to an imagined 'ideal' service (54% of students; 60% of consumers who are unemployed or not working compared to 66% for consumers with other listed employment statuses).</p>
	Region	Significant	
	Employment status	Significant	
	Gender	Not significant	
	Income	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.



# Differences in Satisfaction by Business Demographics

Smaller businesses and businesses located in regional and rural areas are more satisfied with the NSW Government services they interact with.

		Demographic characteristics	Significance of differences identified <sup>1</sup>	
Business		Business Size	Significant	<p><b>Business Size</b></p> <p>Across the NSW business community, smaller businesses (fewer than 200 employees) are more satisfied with the NSW Government services they use (average satisfaction of 7.3 compared to 6.9 for businesses with 200+ employees).</p> <p>A higher proportion of smaller businesses (fewer than 200 employees) also agree their experience is close to an imaged 'ideal' service (68% for businesses with fewer than 200 employees compared to 61% for businesses with 200+ employees).</p>
		Region	Significant	<p><b>Region</b></p> <p>Overall satisfaction with NSW Government services is higher among businesses located in rural areas compared to regional and metro areas (average satisfaction of 8.1 for rural compared to 7.3 and 7.1 for regional and metro respectively). Expectations of the overall quality of service are also higher in rural areas compared to regional and metro areas (average score of 8.6 for rural compared to 7.6 and 7.5 for regional and metro respectively). The gap between satisfaction and expectation however remains consistent across regions.</p>
		Industry	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.

# Perceptions of the NSW Public Service 'Brand'

Satisfaction with the NSW Public Service overall is significantly less than satisfaction with NSW Government services highlighting a disconnect between customers' experiences of service delivery and their perceptions of the Public Service 'brand'.

Along with satisfaction of NSW Government services, customers were also asked to rate their satisfaction with the 'NSW Public Service overall' (the 'brand') and a selection of other industries.

Results show public satisfaction with the NSW Public Service 'brand' compares favourably with that of other industries. Average satisfaction with the NSW Public Service 'brand' is 6.5 for consumers and 6.4 for businesses, which is on par with banks (average score of 6.4 for consumers and 6.3 for businesses) but behind airlines (average score of 7.0 for consumers and 7.2 for businesses). Refer to Figure 5 for further detail.

Satisfaction with the NSW Public Service 'brand' is significantly less than satisfaction with NSW Government services overall (average score of 7.3 for consumers and 7.2 for businesses). This result suggests a disconnect between customers' experiences with service delivery and perceptions of the NSW Public Service 'brand' which are affected by a range of influences such as word-of-mouth and media.

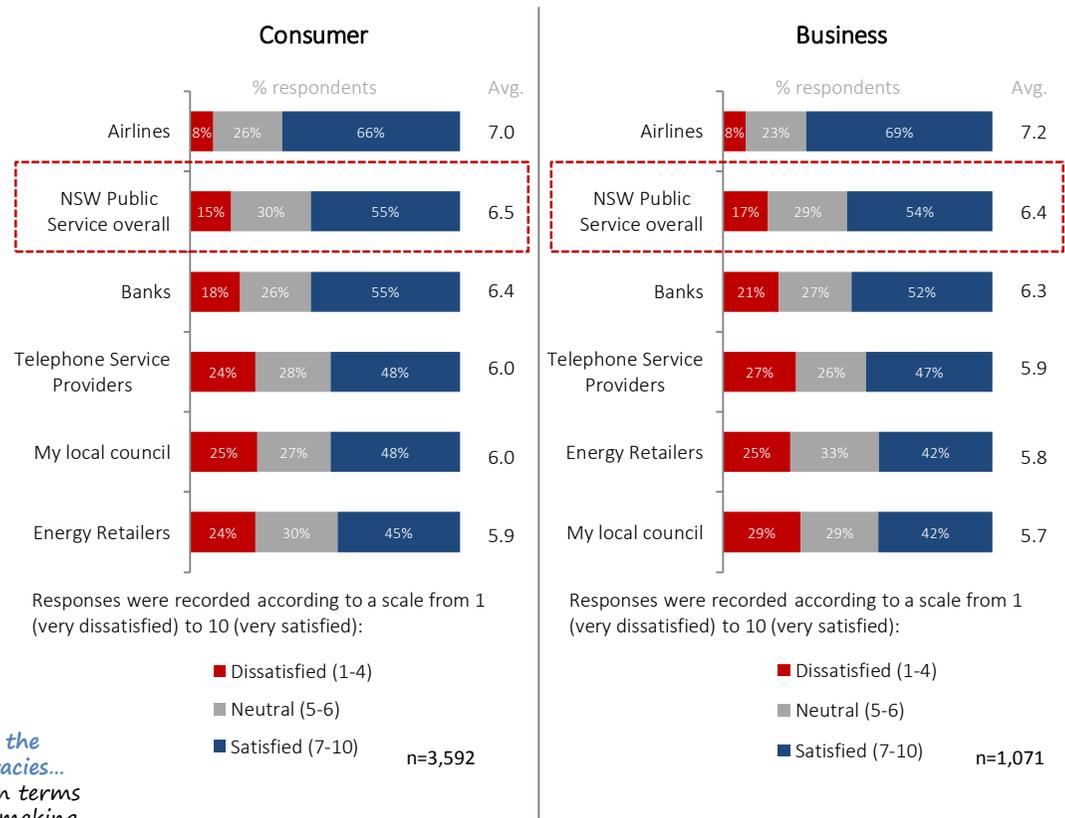
“I have similar experiences with banks as I do with the public services...you get shifted around departments.”

“I may be led by my political views.. I think it all [perception of the public service] boils down to your local member and who you can relate to.”

“Banks have similar issues [as the public service] with bureaucracies... And some are much worse in terms of the forms they need and making you go in person.”

**Figure 5: Satisfaction with NSW Public service overall compared to other industries**

Customers were asked “Thinking about all your experiences with each of the following Australian industries and public services over the previous 12 months, how satisfied would you say you are with them? ”



# How Customers Describe the NSW Public Service 'Brand'



The disconnect between service experiences and 'brand' is further supported by customers describing the NSW Public Service 'brand' negatively even when they are satisfied with NSW Government services.

Customers were asked to select from a list of descriptors those that they would use to describe the NSW Public Service. The words most commonly selected by customers to describe the NSW Public Service overall are the positive descriptors of 'helpful', 'capable', 'friendly' and 'knowledgeable' (refer to Figure 6).

Following this, the next most commonly selected words to describe the NSW Public Service are the negative descriptors of *inefficient, impersonal and inflexible*.

34% of consumers and 47% of businesses selected both positive and negative descriptors for the NSW Public Service, suggesting inconsistency in perception and areas of stronger and weaker performance.

Customers who are more satisfied with the NSW Public Service overall more commonly select positive attributes to describe NSW the Public Service while customers who are neutral or dissatisfied with the NSW Public Service overall more commonly select negative attributes to describe the NSW Public Service, in particular inefficiency is the most common descriptor selected by dissatisfied customers.

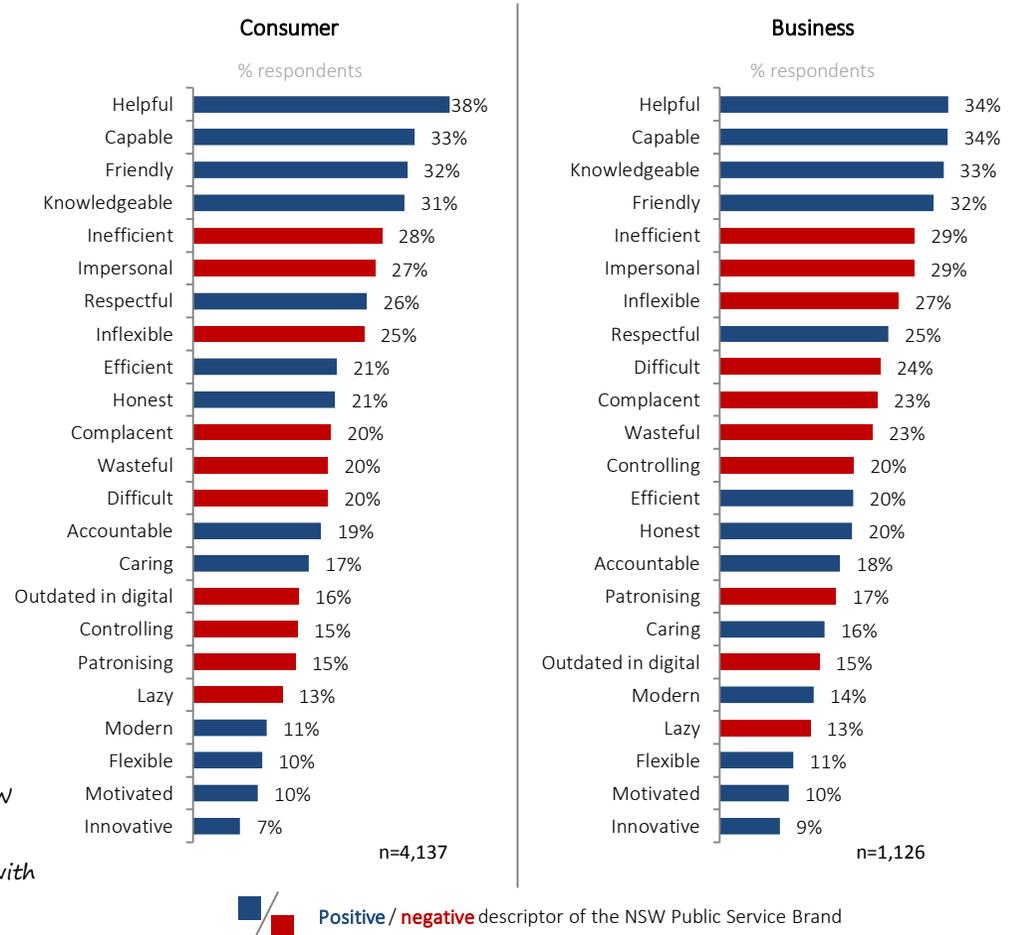
The disconnect between service experiences and 'brand' is further supported by customers describing the NSW Public Service 'brand' negatively even when they are satisfied with NSW Government services. For example, 14% of customers who are satisfied with NSW Government services describe the NSW Public Service as 'inflexible' and 13% who are satisfied with NSW Government Services describe the NSW Public Service as 'inefficient.'

“They were helpful.. Provided me with right information, detailed information about what will happen next and told me where to go for more information.”

“[I would describe the NSW Public Service as] under resourced.. There is a big waiting list of anything with the government.”

Figure 6: Descriptors of the NSW Public Service overall

Customers were asked "Thinking now about the NSW Public Service overall, and all of the services and agencies which fall under it, which of the following words would you use to describe the NSW Public Service?"



# Detailed Findings

1. Overall performance - *Key Findings 1, 2 and 3*

2. Performance against customer satisfaction drivers - *Key Findings 4 and 5*

3. Complaints handling - *Key Finding 6*

4. Perceptions of online services - *Key Findings 7 and 8*

5. Variation in performance across services – *Key Finding 9*

6. Comparison of performance to other jurisdictions – *Key Finding 10*



## Areas covered in this section

1. Customer Views on NSW Government Services Employee Performance.....p. 34
2. Customers Views on Performance of NSW Government Services Against Process Attributes...p.37
3. Customer Views on Performance of NSW Government Services Against Values.....p. 40
4. Customers Views on Performance of NSW Government Services Against Goals.....p.43
5. Drivers of Customer Satisfaction.....p.46

## Detailed Findings Summary:

- Customers were asked to rate the performance of NSW Government services on several attributes within four outcome areas identified as important in shaping customers perceptions of NSW Government Services overall:
  - Employees: NSW Government service employees were rated highest against the attributes of honesty, safety and ‘provide services without bias’; performance was rated lowest against accountability, ‘getting things done as quickly as possible’ and ‘seeing things from the customer perspective’
  - Values: Customers were positive about the performance of NSW Government services against the values of integrity and ‘provides good service’ and were less positive in their perceptions of performance against the value of accountability
  - Processes: Customers rate NSW Government services higher for ‘processes are easy to understand’ and lower for ‘I can get to the right person the first time’ and ‘are designed to reduce wait times’
  - NSW Government goals: Customers were more positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ however fewer agree that services ‘encourage public participation in decision making’
- Further analysis of the impact of each of the attributes on overall satisfaction has identified eight drivers of customer satisfaction with NSW Government services: communication, efficiency and effectiveness of employees, honesty and integrity of employees, access to information, privacy, transparency, simplicity and efficiency of processes and employee autonomy.
- Customer satisfaction with NSW Government services is also highly correlated with customers’ perceptions of the quality of service provided and accountability of the organisation, indicating they are related outcome measures.
- When importance and current performance against each of the drivers is taken into account, efficiency and effectiveness of employees and access to information are identified as priority opportunity areas to drive increases in satisfaction with NSW Government services overall. Simplicity and efficiency of processes is a related opportunity for improvement as this driver is strongly related to efficiency and effectiveness of employees and access drivers.

## Key Findings Covered in this Section:

**Key Finding 4:** There are eight key drivers of customer satisfaction with services relating to employees, processes, access to information, transparency and privacy

**Key Finding 5:** Of the eight satisfaction drivers, efficiency and effectiveness of employees (related to simplicity and efficiency of processes) and access to information are primary opportunities to drive increases in satisfaction.



# Customer Views on NSW Government Services Employee Performance

NSW Government service employees were rated highest against the attributes of honesty, safety and provide services without bias; performance was rated lowest against accountability, getting things done as quickly as possible and seeing things from the customer perspective.

Customers were asked their level of agreement with several statements relating to NSW Government services' employees based on their recent experiences dealing with the service directly.

Overall, NSW Government service employees were rated highest against the attributes of 'are honest' (average score of 7.5 for consumers and 7.6 for businesses), 'deliver high safety standards' (average score of 7.5 for consumers and 7.5 for businesses) and 'provide services without bias' (average score of 7.5 for consumers and 7.4 for businesses).

Employee performance was rated lowest against the attributes of 'are held accountable' (average score of 6.9 for consumers and 6.9 for businesses), 'get things done as quickly as possible' (average score of 6.8 for consumers and 6.8 for businesses) and 'see things from my perspective' (average score of 6.8 for consumers and 6.7 for businesses).

Figure 7 provides further detail on performance against all employee attributes included in the survey.

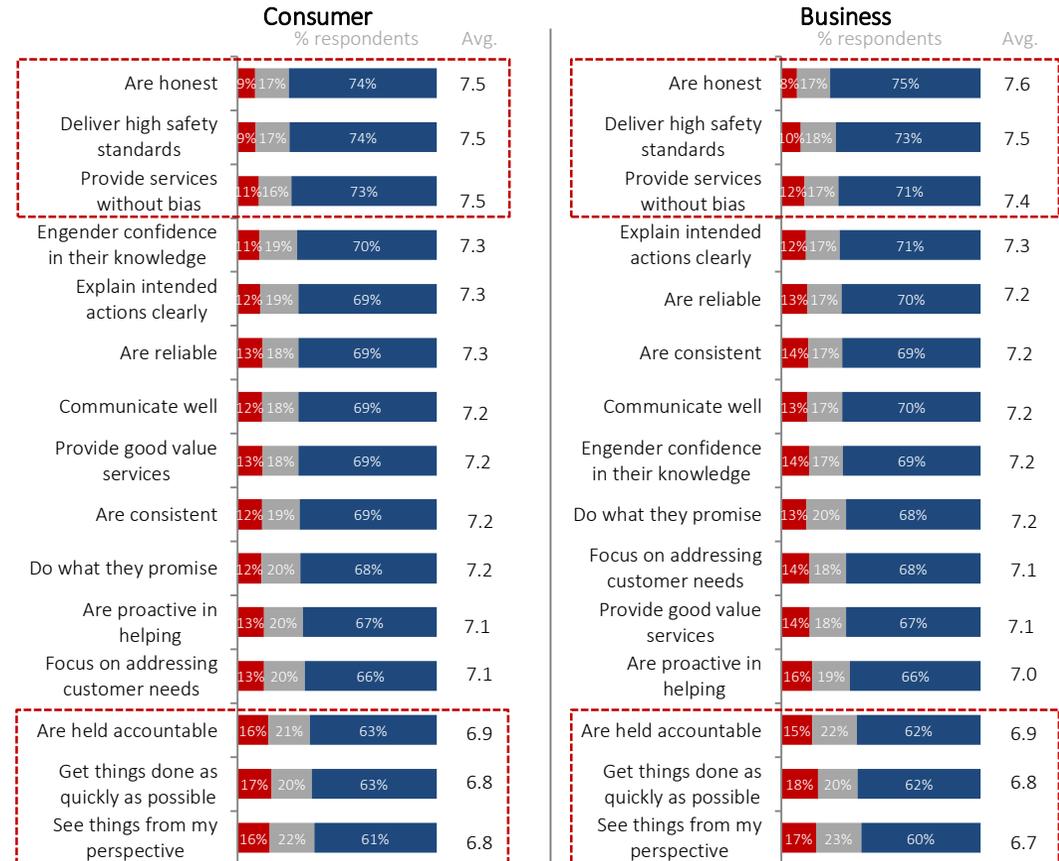
“ They [employees] need to be able to relate to you and your business.. change attitudes...don't tell what you can't do, I'm only interested in what you can do.”

“ Have a one-on-one adviser for each enquirer to prevent repeated information and increase accountability. ”

“ I think there has been a 5-10% improvement to staff and speed with which they react to your needs over the last few years. ”

“ He got it done really fast... He was very good. ”

**Figure 7: Performance of NSW Government Services against each of the employee attributes**  
Customers were asked “Thinking now about its employees, to what extent do you agree or disagree that each of the following statements describes [a particular government service] in NSW?”



Responses were recorded according to a scale from 1 (strongly disagree) to 10 (strongly agree):

■ Disagree (1-4) ■ Neutral (5-6) ■ Agree (7-10)

n=5,713

Responses were recorded according to a scale from 1 (strongly disagree) to 10 (strongly agree):

■ Disagree (1-4) ■ Neutral (5-6) ■ Agree (7-10)

n=1,479

# Differences in Customer Views on Employee Performance by Consumer Demographics

Older, retired consumers living in regional areas on middle incomes are more positive in their views of NSW Government services employees while students and full time employees on higher incomes have less positive views.

	Demographic characteristics	Significance of differences identified <sup>1</sup>	
Consumer	Age	Significant	<p><b>Age</b></p> <p>Consumers aged 55+ are more positive about the performance of NSW Government services employees across all attributes, in particular rating them higher on ‘get things done as quickly as possible’ (average score of 7.3 for consumers aged 55+ and 6.6 for consumers under 55 years of age).</p>
	Region	Significant	<p><b>Region</b></p> <p>Consumers who live in regional and rural areas are more positive in their perceptions of NSW Government services employees across all attributes, in particular rating them higher on ‘are honest’ (average score of 7.8 for regional and rural compared to 7.4 for metro) and ‘are reliable’ (average score of 7.6 for regional and rural compared to 7.2 for metro).</p>
	Employment status	Significant	<p><b>Employment Status</b></p> <p>Retirees are more positive about the performance of NSW Government services employees against all attributes, while consumers who are students, unemployed/not working or are working full time are less positive. In particular, students are much less positive that NSW Government services employees ‘see things from my perspective’ (average score of 6.4 compared to overall average of 6.8).</p>
	Income	Significant	<p><b>Income</b></p> <p>Consumers within the income bracket of \$30k to \$50k are more positive about the performance of NSW Government services employees across all attributes. Consumers in the income bracket of \$100k to \$150k are less positive, in particular rating employees lower on ‘get things done as quickly as possible’ (average score of 6.6 compared to 7.0 for consumers with income under \$100k) and ‘focus on addressing customer needs’ (average score of 6.9 compared to 7.3 for consumers with income under \$100k).</p>
	Gender	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.



# Differences in Customer Views on Employee Performance by Business Demographics

Perceptions of NSW Government service employees varies by industry.

		Demographic characteristics	Significance of differences identified <sup>1</sup>	
Business	Industry		<b>Significant</b>	<p><b>Industry</b></p> <p>Businesses within the 'Finance and Insurance' industry are more positive that NSW Government services employees 'are consistent' (average score of 8.3 compared to overall average of 7.0).</p> <p>Businesses within the 'Education' industry are more positive about the accountability of NSW Government services employees, rating them higher on 'are held accountable' (average score of 8.3 compared to overall average of 6.7), 'do what they promise' (average score of 8.3 compared to overall average of 7.1) and 'provide services without bias' (average score of 8.6 compared to overall average of 7.1).</p>
	Business size		<b>Not significant</b>	
	Region		<b>Not significant</b>	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.

# Customer Views on Performance of NSW Government Services Against Process Attributes

Customers rate NSW Government services higher for ‘processes are easy to understand’ and lower for ‘I can get to the right person the first time’ and ‘processes are designed to reduce wait times’.

Customers were asked their level of agreement with several statements relating to the processes and efficiency of NSW Government services based on their recent experiences in dealing with the service directly.

Overall, NSW Government service processes were rated highest for ‘processes are easy to understand’ (average score of 6.8 for consumers and 6.7 for businesses). The lowest rated process attributes for NSW Government service processes were ‘I can get to the right person the first time’ (average score of 6.4 for consumers and 6.1 for businesses) and ‘processes are designed to reduce wait times’ (average score of 6.4 for consumers and 6.2 for businesses). Refer to Figure 8 for further detail on performance against processes attributes.

Customers who rate NSW Government services lower on process related attributes, in particular ‘processes are designed to reduce wait times’ and ‘I can get to the right person the first time’ also rate NSW Government services employees lower on ‘getting things done as quickly as possible.’

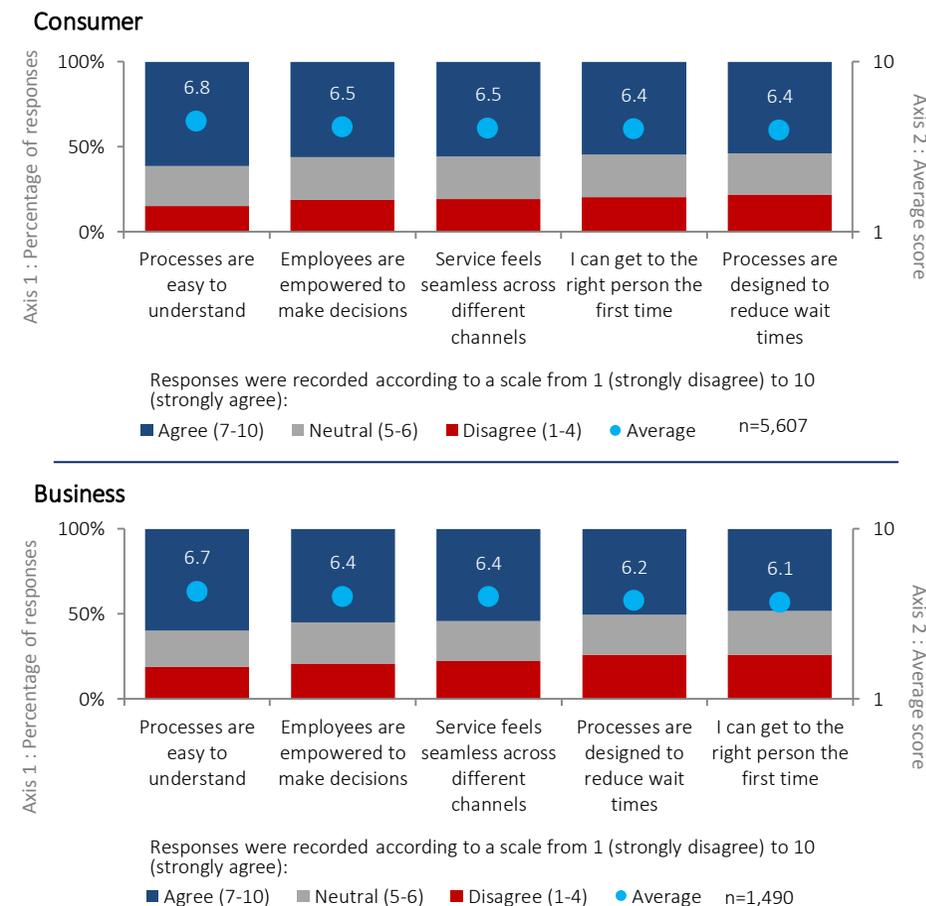
Perceptions of NSW Government service processes are higher among customers who have gone online to carry out direct dealings with NSW Government services, compared to those who have used other channels. This result suggests that online services may be bypassing some of the difficulties in processes experienced by customers via other channels, resulting in higher scores for process related attributes.

“Simple is a one-stop-shop for business needs...like Service NSW.”

“They need to be more efficient.. Solve things and respond as quickly as possible but this is not always my experience.”

**Figure 8: Performance of NSW Government Services against each of the process attributes**

Customers were asked “Thinking now about its processes (across any of the contact methods you have encountered), to what extent do you agree or disagree that each of the following statements describes [a particular government service] in NSW?”



# Differences in Customer Views on NSW Government Processes by Consumer Demographics

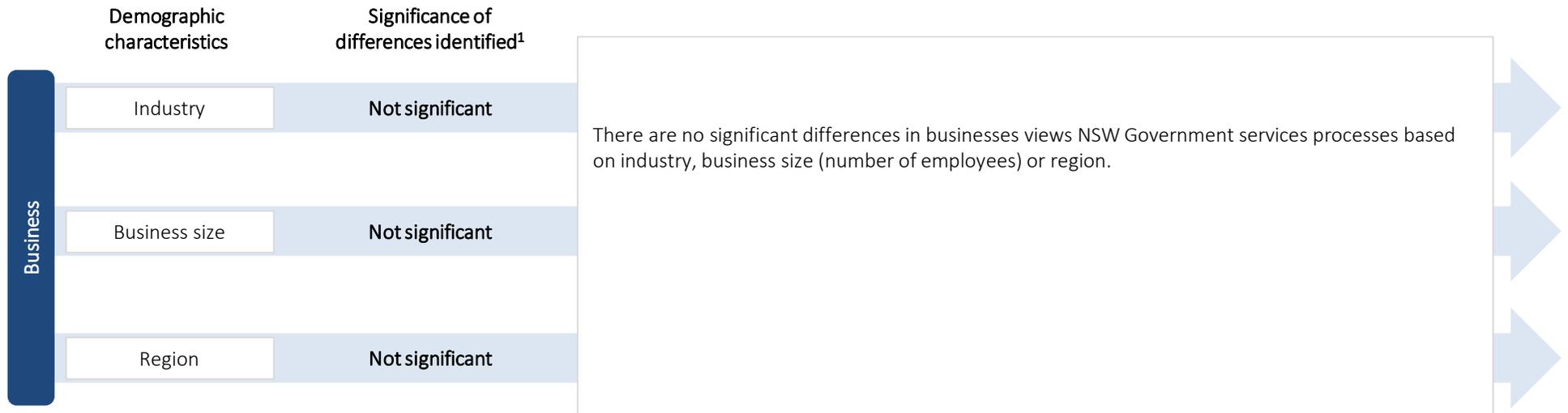
Perceptions of NSW Government service processes vary among consumers by age, region, employment status and income, consistent with differences in perceptions of overall service performance.

	Demographic characteristics	Significance of differences identified <sup>1</sup>	
Consumer	Age	Significant	<p><b>Age</b></p> <p>Consumers aged 35 to 54 are less positive in their perceptions of NSW Government service processes across all attributes compared to other age groups, in particular providing lowest ratings for ‘processes are designed to reduce wait times’ (average score of 6.0 for consumers aged 35 to 54 compared to 6.5 and 6.6 for consumers aged under 34 and over 55 respectively).</p> <p><b>Region</b></p> <p>Consumers who live in regional and rural areas are more positive in their perceptions of NSW Government service processes against all attributes, in particular rating them higher on ‘processes are designed to reduce wait times’ (average score of 6.6 for regional/rural compared to 6.3 for metro).</p> <p><b>Employment Status</b></p> <p>Retirees are more positive about the performance of NSW Government services processes across all attributes. Consumers who are employed full time are less positive that ‘processes are easy to understand’ (average score of 6.6 compared to 6.8 overall), while self-employed/businesses owners are less positive that they ‘can get to the right person the first time’ (average score of 6.1 compared to 6.4 overall).</p> <p><b>Income</b></p> <p>Consumers in the income bracket of \$100k to \$150k are less positive about NSW Government services processes against all attributes, in particular that NSW Government services are ‘designed to reduce wait times’ (average score of 6.2 compared to 6.6 for consumers with income under \$100k).</p>
	Region	Significant	
	Employment status	Significant	
	Income	Significant	
	Gender	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.

# Differences in Customer Views on NSW Government Processes by Business Demographics

Perceptions of NSW Government service processes does not vary significantly among businesses by industry, size or region.



# Customer Views on Performance of NSW Government Services Against Values

Customers were positive about the performance of NSW Government services against the values of integrity, trust and 'provides good service' and were less positive in their perceptions of performance against the value of accountability.

Customers were asked their level of agreement that NSW Government services demonstrate the four core NSW Government values of integrity, trust, accountability and providing good service based on their direct dealings with the service.

Overall, customers were positive about the performance of NSW Government services against the values of integrity (average score of 7.1 for consumers and 7.2 for businesses), trust (average score of 7.1 for consumers and 7.0 for businesses) and 'provides good service' (average score of 7.0 for consumers and businesses). This finding is strongly aligned with consumers' perceptions of NSW Government services employee performance against attributes of 'honest and integrity' and perceptions of NSW Government services performance against the goal of 'safeguard privacy and confidentiality.' Refer to Figure 8 for further detail on performance against the values.

Customers were slightly less positive in their perceptions of how NSW Government services perform against the value of accountability, (average score of 6.8 for consumers and businesses) which is consistent with the lower rating of NSW Government services employees against the attribute of 'are accountable'.

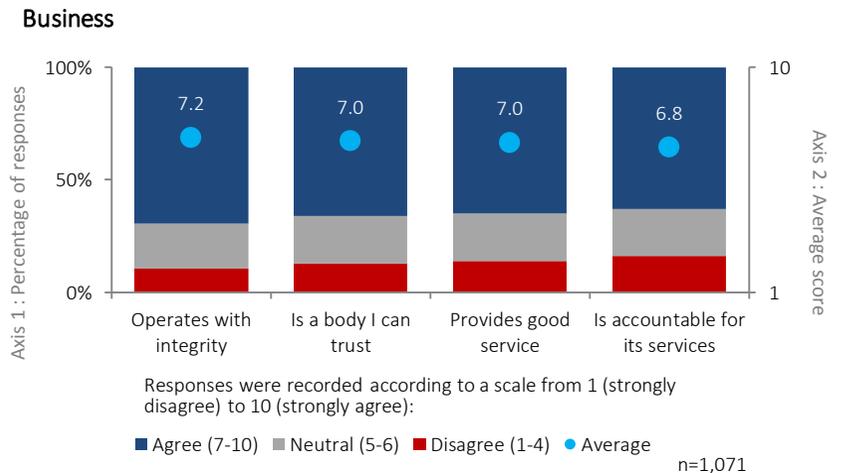
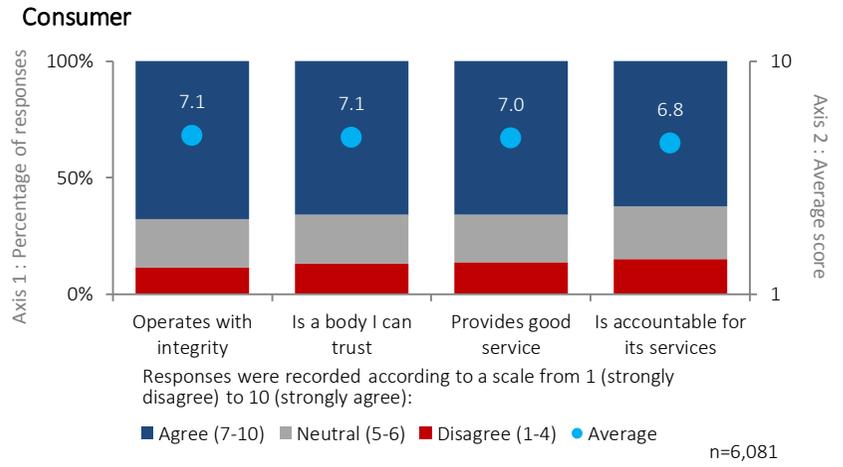
The research has found that perceptions of NSW Government services performance against each of the values is highly related to customers overall satisfaction with NSW Government services and also to consumers perceived performance of NSW Government services against employee, process and goal attributes. The high correlation of these measures suggests values are important outcome measures against which to measure progress as they are indicators of the overall quality of service delivered.

“Accountability means doing what you say you are going to do, following up and providing accurate and timely information.”

“Good service means strong work ethics, getting the right outcome first time.”

**Figure 9: Performance of NSW Government Services against each of the values**

Customers were asked “Thinking about the values that they uphold, to what extent would you agree with each of the following statements when thinking about [a particular government service] in NSW?”



# Differences in Customer Views on Performance Against Values by Consumer Demographics

Consistent with variations identified in employee performance, older, retired consumers living in regional areas are more positive in their views of NSW Government services performance against the values, while full time employees, consumers living in metro areas and those on higher incomes are less positive.

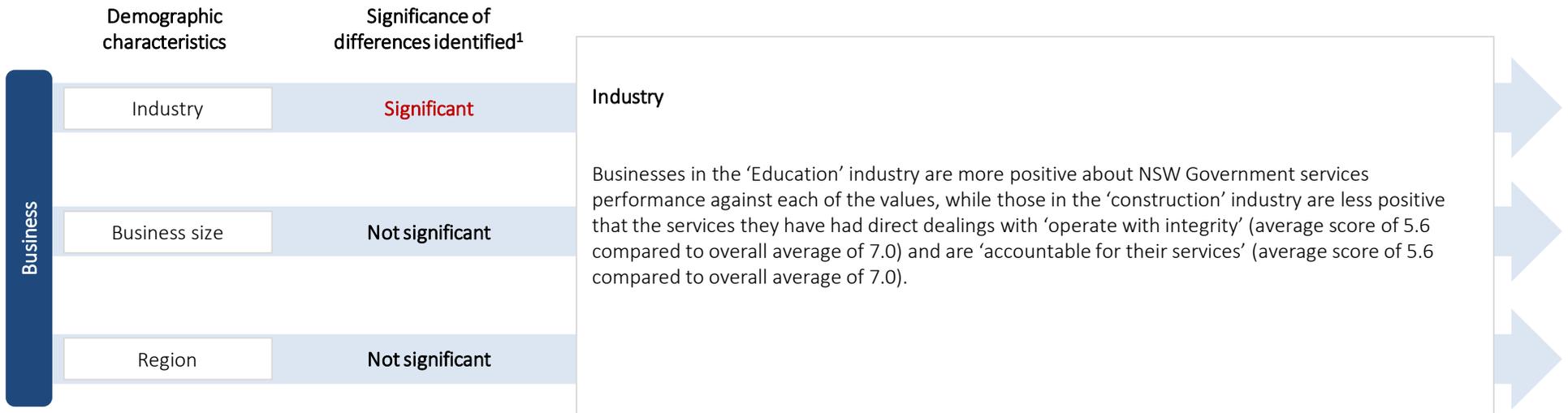
	Demographic characteristics	Significance of differences identified <sup>1</sup>	
Consumer	Age	Significant	<p><b>Age</b> Consumers aged 55+ are more positive about the performance of NSW Government services against each of the values, in particular rating them highest on ‘operates with integrity’ (average score of 7.5 for consumers aged 55+ and 6.9 for consumers under 55 years of age).</p> <p><b>Region</b> Consumers who live in regional and rural areas are more positive in their perceptions of NSW Government services performance against each of the values, in particular rating them higher on ‘provides good service’ (average score of 7.3 for regional and rural compared to 6.9 for metro).</p> <p><b>Employment Status</b> Retirees are more positive about the performance of NSW Government services against each of the values. Consumers who are employed full time are less positive, rating NSW Government services lowest against all attributes, as are consumers who are unemployed/not working who rate NSW Government services lowest on ‘is a body I can trust’ (average score of 6.6 compared to overall average of 7.1).</p> <p><b>Income</b> Consumers within the income bracket of \$30k to \$50k are more positive about the performance of NSW Government services across all values. Consumers in the income bracket of \$100k to \$150k are less positive in particular that NSW Government services are ‘accountable for its services’ (average score of 6.7 compared to 7.0 for consumers with income under \$100k).</p>
	Region	Significant	
	Employment status	Significant	
	Income	Significant	
	Gender	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.



# Differences in Customer Views on Performance Against Values by Business Demographics

Businesses in the Education industry are more positive about NSW Government services performance against the values than Businesses from other industries.



<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.

# Customers Views on Performance of NSW Government Services Against Goals



Customers were more positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ however fewer agree that services ‘encourage public participation in decision making’.

Customers were asked if they agree or disagree that NSW Government services are delivering against NSW Government goals of privacy, access to information, openness and transparency and public consultation, based on their recent experiences in dealing with the service directly.

Overall, customers are more positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ (average score of 7.3 for consumers and 7.2 for businesses) however fewer agree that services ‘encourage public participation in decision making’ (average score of 6.0 for consumers and business).

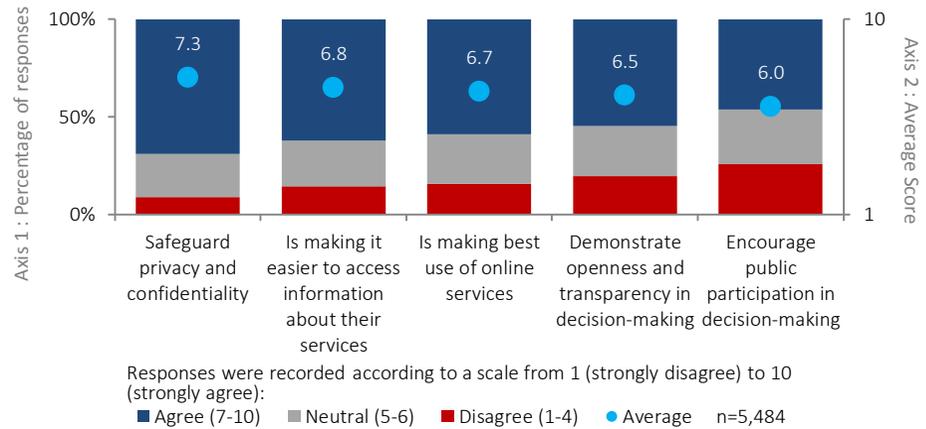
Customers who rate NSW Government services lower on ‘is making it easier to access information about their services’ and ‘is making best use of online services to improve convenience and efficiency for customers’ also rate NSW Government services lower against process related attributes, in particular ‘processes are designed to reduce wait times’ and ‘I can get to the right person the first time.’

“Need an *online tracking system* so you can monitor and see what action has been taken... citizens would be informed and know how the service is being provided and delivered.”

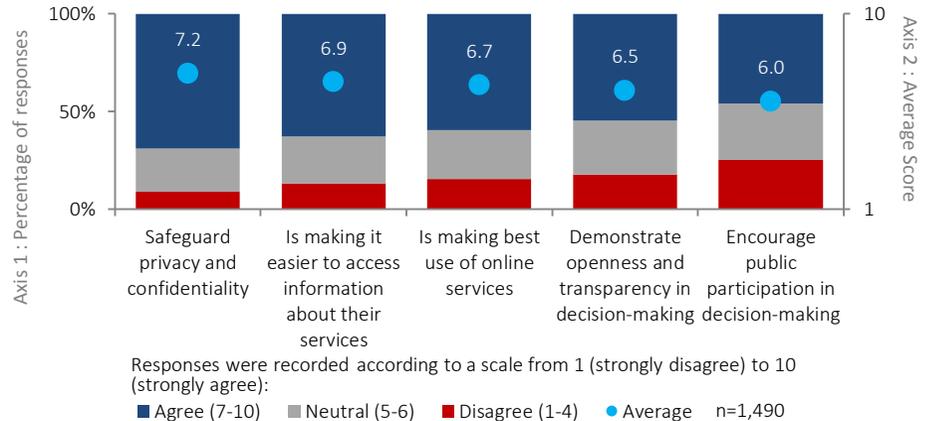
**Figure 10: Performance of NSW Government Services against NSW Government goals**

Customers were asked “Thinking about the services they provide overall (across any of the contact methods you have encountered), how would you rate [a particular government service] in NSW on the following?”

## Consumer



## Business



# Differences in Customer Views on Performance Against Goals by Consumer Demographics

Perceptions of NSW Government services performance against NSW Government goals vary by age, region, employment status and income, consistent with variations identified in perceptions of overall performance.

	Demographic characteristics	Significance of differences identified <sup>1</sup>	
Consumer	Age	Significant	<p><b>Age</b></p> <p>Consumers aged 55+ are more positive that NSW Government services ‘safeguard privacy and confidentiality’ (average score of 7.7 compared to 7.0 for consumers under 55 years of age) and ‘is making best use of online services to improve convenience and efficiency for customers’ (average score of 7.1 compared to 6.5 for consumers under 55 years of age). Consumers aged 18 to 34 are more positive that NSW Government services ‘encourage public participation in decision-making’ (average score of 6.3 compared to 5.8 for consumers aged 35+).</p>
	Region	Significant	<p><b>Region</b></p> <p>Consumers who live in regional and rural areas are more positive in their perceptions of NSW Government services performance against all goals, in particular rating them higher on ‘is making best use of online services to improve convenience and efficiency for customers’ (average score of 7.0 out of 10 for regional and rural compared to 6.6 out of 10 for metro). However, there is no difference in perceptions of performance against the goal of ‘encourage public participation in decision making’ which is rated lowest across consumers in both metro and regional/rural areas.</p>
	Employment status	Significant	<p><b>Employment Status</b></p> <p>Retirees are more positive about the performance of NSW Government services against each of the goals, excluding ‘encourage public participation in decision making’ which is ranked lowest across all employment types.</p>
	Income	Significant	<p><b>Income</b></p> <p>Consumers in the income bracket of \$30k to \$50k are more positive about NSW Government services performance against all goals.</p>
	Gender	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.

# Differences in Customer Views on Performance Against Goals by Business Demographics

Businesses in the education industry are more positive that NSW Government services 'safeguard privacy and confidentiality.'

	Demographic characteristics	Significance of differences identified <sup>1</sup>	
Business	Industry	Significant	<b>Industry</b> Businesses in the 'Education' industry are more positive that NSW Government services 'safeguard privacy and confidentiality' (average score of 8.4 compared to 6.9 overall).
	Business size	Not significant	
	Region	Not significant	

<sup>1</sup>Note: Significant differences identified at the 95% level of significance. Statistical tests based on either a variation of t-test for comparing two means or variation of chi-squared test for interdependence between two proportions of the population.

# Drivers of Customer Satisfaction

The research has identified individual drivers of customer satisfaction based on groupings of attributes across employees, process, goals and values.

Attributes of employees, values, processes and goals are highly correlated with each other in driving overall satisfaction with NSW Government services. Further analysis was undertaken to understand how the individual attributes group together into drivers that capture separate aspects of customers' experiences. Groupings are displayed in Figure 11, with additional explanation below.

## Employee

Employee attributes group into three drivers which represent individual drivers of customer satisfaction:

1. Honesty and integrity of employees which includes the attributes of 'provide services without bias', 'are honest' and 'deliver high safety standards'
2. Efficiency and effectiveness of employees comprising of 'getting things done as quickly as possible', 'are held accountable' and 'focus on addressing customer needs'
3. Communication including 'explain intended actions clearly', 'communicate well' and 'engender confidence in their knowledge.'

## Process

Processes attributes group into two drivers which represent individual drivers of customer satisfaction:

1. Simplicity and efficiency of processes which includes 'processes are easy to understand'
2. Employee autonomy which is 'employees are empowered to make decisions.'

## Goals

Goals attributes group into three drivers which represent individual drivers of customer satisfaction:

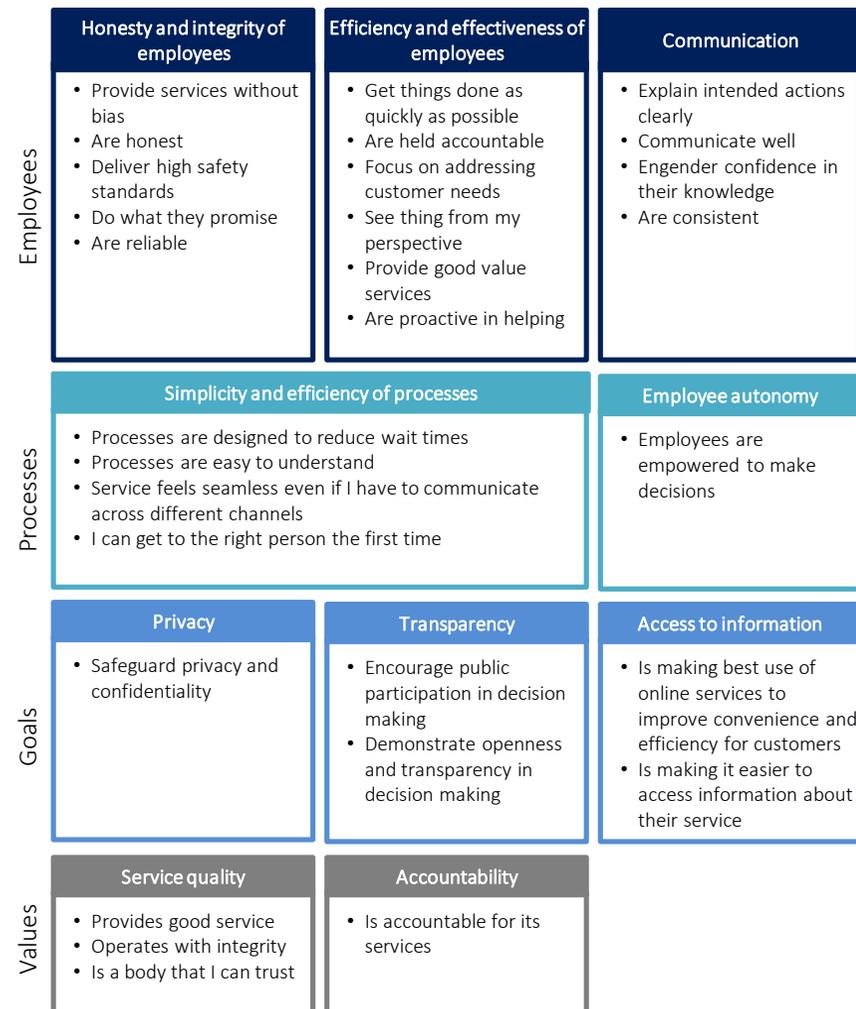
1. Privacy which is 'safeguarding privacy and confidentiality'
2. Transparency which includes 'encourage public participation in decision-making'
3. Access to information which includes 'is making it easier to access information about their services.'

## Values

Values attributes group into two drivers which represent individual drivers of customer satisfaction:

1. Service quality, comprising 'provides good service' and 'operates with integrity'
2. Accountability which is 'are accountable for their services.'

Figure 11: Drivers of customer satisfaction



Note: Analysis based on consumer data however groupings are similar for businesses.



# Importance of Drivers in Determining Overall Customer Satisfaction

Communication, efficiency and effectiveness of employees (linked to simplicity and efficiency of processes), honesty and integrity of employees, and access to information are the most important drivers of satisfaction for consumers and businesses.

While each of the drivers are important in determining customer satisfaction with NSW Government services overall, further statistical analysis was undertaken to understand the relative importance of the drivers.

Results indicate that customer satisfaction is intrinsically linked with perceptions of service quality and accountability, suggesting these should be viewed as a group of related indicators of the overall quality of service delivered (similar to customer satisfaction), rather than individual drivers. For example, based on this finding it is expected that increased satisfaction should result in improved perceptions of service quality and vice versa. Therefore these are presented as 'related outcome measures' in Figure 12.

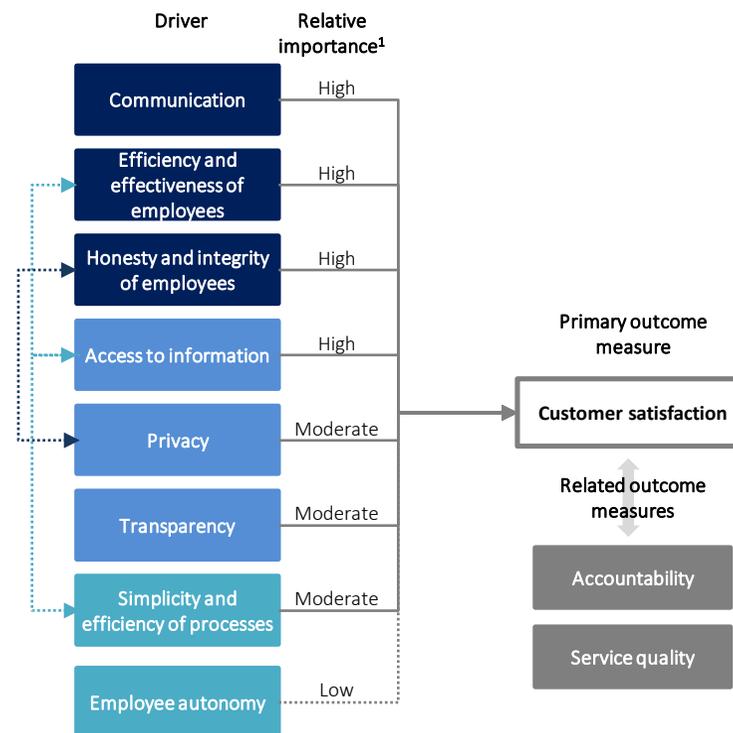
Analysis of the impact of each of the eight remaining drivers on overall satisfaction with NSW Government services reveals communication, efficiency and effectiveness of employees, honesty and integrity of employees and access to information (including access to information and making best use of online services) are more important drivers of satisfaction for consumers and businesses as they are relatively more important in explaining overall customer satisfaction (refer to Figure 12). Employee autonomy is of lowest importance for both consumers and businesses in explaining overall satisfaction.

Further analysis reveals that customers views of the honesty and integrity of employees is strongly linked to privacy (i.e. customers who rate NSW Government services higher on privacy also rate NSW Government services higher on attributes captured within the honesty and integrity of employees).

Customers views on the efficiency and effectiveness of employees is also highly related to their views on access to information, simplicity of processes and efficiency of process suggesting a need to consider these as a related group of drivers.

Note that analysis to identify drivers has been performed against the overall satisfaction measure for simplicity. However, overall satisfaction is highly correlated with the Customer Satisfaction Index (correlation of 0.94) indicating that results against the drivers of overall satisfaction are representative of the importance of drivers for the Customer Satisfaction Index.

Figure 12: Impact of drivers of on overall satisfaction with NSW Government Services



<sup>1</sup>Note: Calculation is based on the relativity of parameters in the statistical analysis of drivers against satisfaction.

---- Dotted lines indicated linked drivers such that if the performance against one driver increases, performance against other drivers will likely also increase



# Performance Against the Drivers of Satisfaction

Across the satisfaction drivers, customers rate NSW Government services highest for the honesty and integrity of employees and lowest for transparency, simplicity and efficiency of processes, employee autonomy and access.

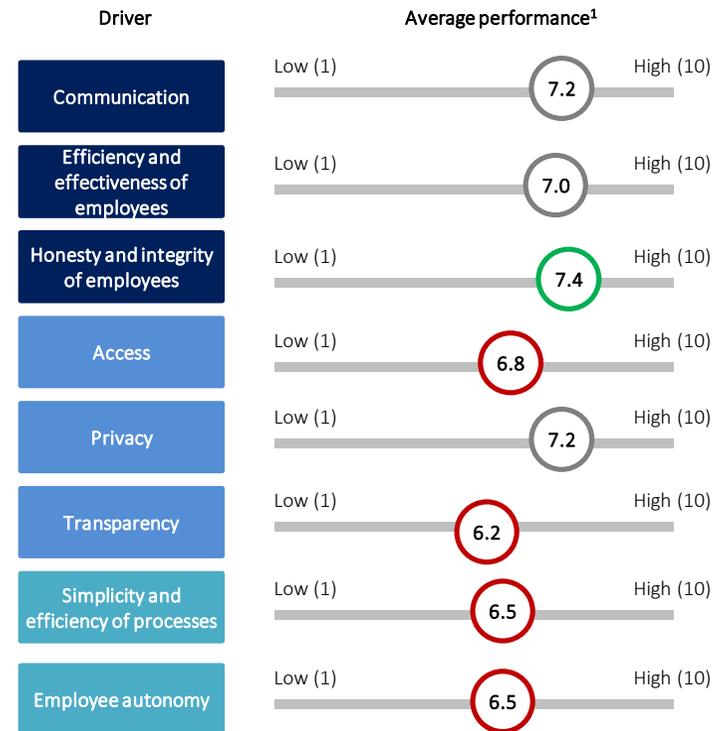
Of the eight satisfaction drivers, customers perceive NSW Government services perform most positively on honesty and integrity of employees (average score of 7.4). In particular, customers rate NSW Government employees highest against the attributes of ‘are honest’, ‘deliver high safety standards’ and ‘provide services without bias.’

Average performance is lowest for the following satisfaction drivers:

- Transparency (average score of 6.2) comprising ‘demonstrate openness and transparency in decision- making’ and ‘encourage public participation in decision-making’
- Simplicity and efficiency of processes (average score of 6.5) in particular ‘processes are designed to reduce wait times’ and ‘I can get to the right person the first time’
- Employee autonomy (average score of 6.5) in that ‘employees are empowered to make decisions’; and
- Access (average score of 6.8) comprising ‘is making it easier to access information about their services’ and ‘is making best use of online services to improve convenience and efficiency’.

“All I want is accurate assistance in a timely manner.”

Figure 13: Average performance against each of the drivers



 Score is significantly higher than average across all drivers

 Score is significantly lower than average across all drivers

Note: Average driver performance scores and based on a weighted average performance scores for each of the underlying attributes



# Prioritisation of the Drivers of Satisfaction

When importance and current performance against each of the drivers is taken into account, efficiency and effectiveness of employees and access to information are identified as priority areas to drive the biggest increase in satisfaction with NSW Government services overall.

Further analysis has been undertaken to understand customers views on the relative performance of each of the drivers against their importance in determining overall satisfaction to identify areas of focus at a whole-of-government level (refer to Appendix C: Further Technical Information).

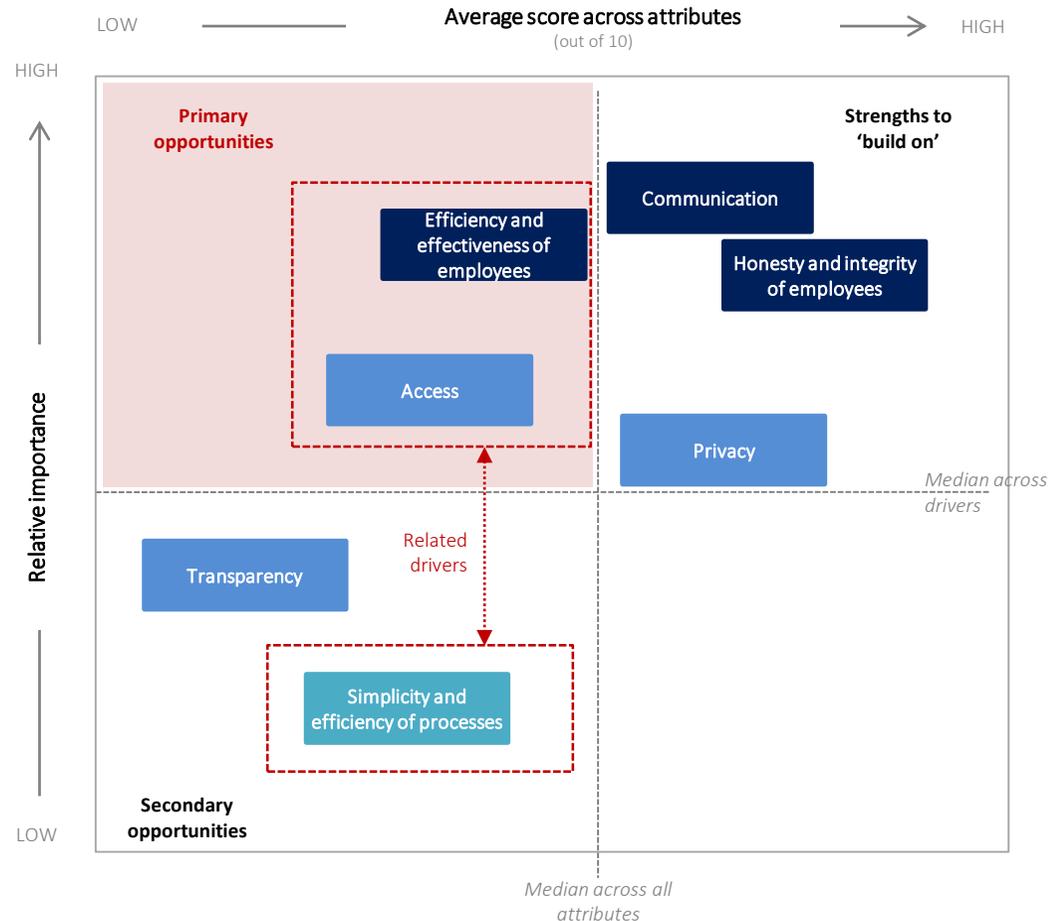
Analysis reveals that efficiency and effectiveness of employees and access are primary opportunity drivers for increasing satisfaction as they are of high importance in driving customer satisfaction and their perceived performance is lower (refer to Figure 14). Simplicity and efficiency of processes is a related opportunity for improvement as perceived performance today is lower and satisfaction with this driver is strongly related to efficiency and effectiveness of employees, and access.

Transparency (i.e. encouraging public participation in decision making) is a secondary opportunity driver for improving satisfaction. While perceived performance against transparency is lower, its importance in determining satisfaction with NSW Government services is also lower.

Communication, honesty and integrity of employees and privacy have been identified as strengths to 'build on' across services as they are of high importance to customers and perceived performance is also higher than other drivers.

“All of these [efficiency, simplicity, accountability, access etc.] are really important.. And some of them overlap each other.”

Figure 14: Importance versus performance against each of the drivers of satisfaction



Note: Analysis displayed is based on consumer data however similar results are observed for businesses.  
<sup>1</sup>Note: Calculation is based on the relativity of parameters in the statistical analysis of drivers against satisfaction.



# Detailed Findings

1. Overall performance - *Key Findings 1, 2 and 3*

2. Performance against customer satisfaction drivers - *Key Findings 4 and 5*

3. Complaints handling - *Key Finding 6*

4. Perceptions of online services - *Key Findings 7 and 8*

5. Variation in performance across services – *Key Finding 9*

6. Comparison of performance to other jurisdictions – *Key Finding 10*



## Areas covered in this section

1. Customer Views on the Complaints Experience Delivered by NSW Government Services.....p.52

## Detailed Findings Summary:

- Customers' complaints experiences also have a high impact on their satisfaction.
- Results show that customers who had their complaints handled well have higher than average satisfaction, suggesting there is opportunity to improve complaints handling processes to support increased satisfaction for the whole-of-government.

## Key Findings Covered in this Section:

**Key Finding 6:** Customers' complaints handling experiences impact satisfaction and customers who have had their complaints handled well have above average satisfaction.



# Customer Views on the Complaints Experience Delivered by NSW Government Services



Less than half of customers who made a complaint to a NSW Government service thought their complaint was handled well.

Consumers and businesses were asked several questions relating to any complaints they have made to NSW Government services as a supporting indicator of customer satisfaction with service delivery.

23% of consumers and 24% of businesses identified they had made a complaint to a NSW Government service in the last 12 months and an additional 17% of consumers and 20% of businesses had made a complaint more than 12 months ago.

Of those who had made a complaint, only 42% of consumers and 44% of businesses identified that their most recent complaint was handled well (7 to 10 out of 10) with 30% of consumers and 33% of businesses identified their most recent complaint was handled poorly (1 to 4 out of 10). Refer to Figure 15 for further detail.

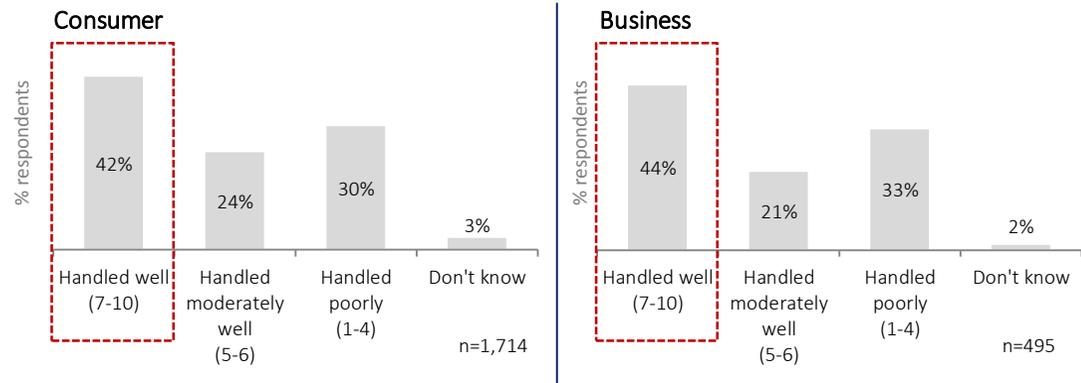
Furthermore, of those who had made a complaint 52% of consumers and 51% of businesses identified that making their most recent complaint was easy (7 to 10 out of 10) with 23% of consumers and 25% of businesses identified it was difficult (1 to 4 out of 10). Refer to Figure 16 for further detail.

Customers perceptions of how well their complaint was handled and how easy it was to make a complaint are highly related (correlation of 0.62) suggesting that the ease of making a complaint is a contributing factor to perceptions of how well the complaint was handled.

“If you lodge a complaint there needs to be a clear indication of when this will be replied to.. Instead of you having to chase it up.”

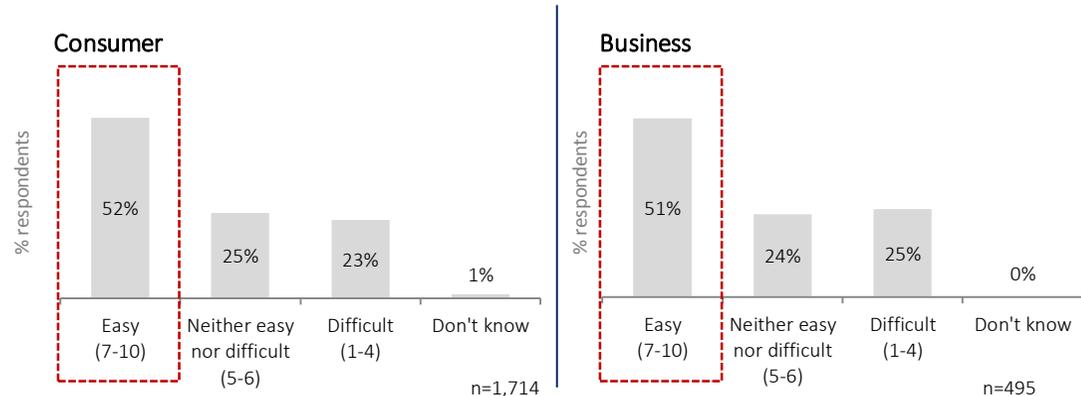
**Figure 15: Customer perceptions of how well their most recent complaint was handled**

Customers were asked “How well or poorly was your most recent complaint handled?” on a scale of 1, handled very poorly, to 10 handled very well



**Figure 16: Customer perceptions of how easy was it to make a complaint**

Customers were asked “How difficult or easy was it to make your complaint?” on a scale of 1, very easy, to 10, very difficult



# Impact of Complaints Experiences on Customer Satisfaction with NSW Government Services



Results show that complaint handling has a large impact on satisfaction, with customers who had their complaints handled well have higher than average satisfaction.

Not surprisingly, it was found that satisfaction with NSW Government services is lower among customers who have made a complaint to a NSW Government service in the last 12 months compared to average satisfaction (average satisfaction of 6.3 for consumers and businesses compared to overall average of 7.3 for consumers and 7.2 for businesses). Moreover, customers who have made a complaint are significantly more likely to score NSW Government services lower against the attributes of accountability and ease of understanding processes, suggesting complaints management processes may be important contributing factors to the priority satisfaction drivers of access to information and employee efficiency and effectiveness.

Customers who identified their complaint was handled well are more satisfied with NSW Government services overall compared to average satisfaction (average satisfaction of 7.7 for consumers and businesses compared to 7.3 and 7.2 overall respectively, refer to Figure 17). Customers who had their complaint handled well also rate NSW Government services employees significantly higher in accountability (average score of 7.5 for consumers and businesses compared to overall average of 6.6).

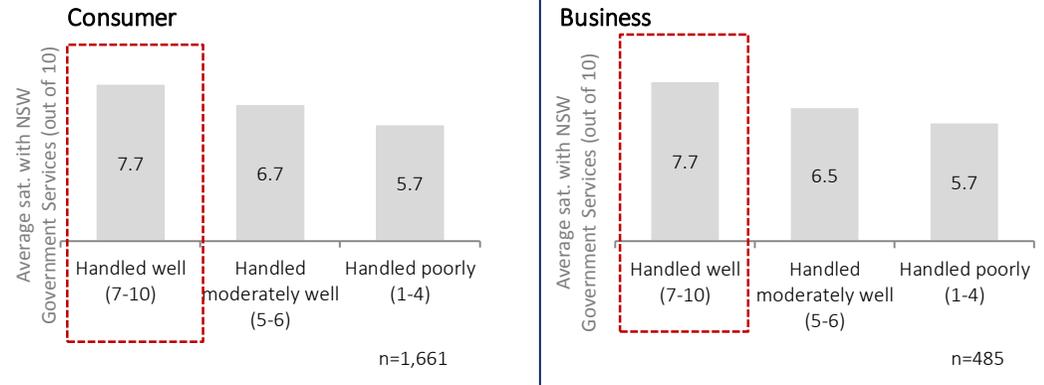
Customers who identified that it was easy to make their complaint are also more satisfied with NSW Government services overall compared to average satisfaction (average satisfaction of 7.4 for consumers and 7.7 for businesses compared to 7.3 and 7.2 overall respectively, refer to Figure 18).

Results suggest that improving complaints handling processes by making it easier to make a complaint and ensuring the complaint is handled well, will support increased whole-of-government satisfaction.

“I had to call back to find out what the end result was.”

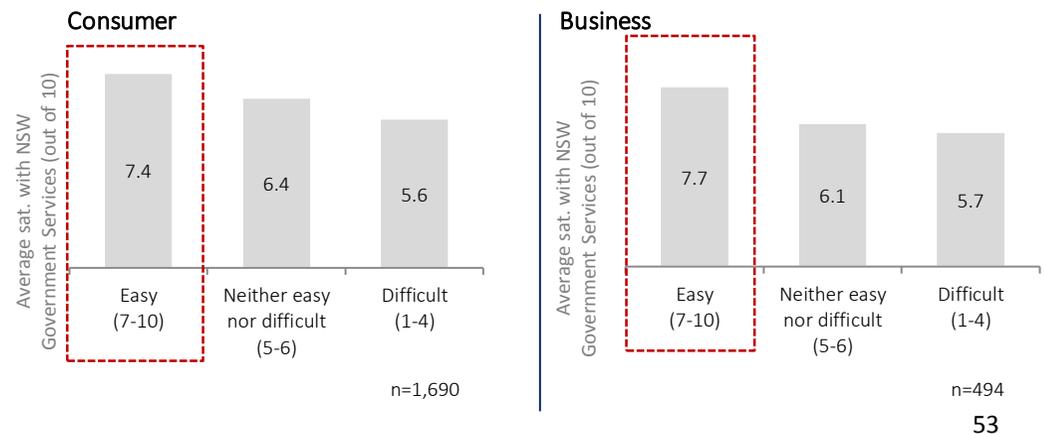
**Figure 17: Impact of complaints handling on satisfaction with NSW Government services**

Customers were asked “How well or poorly was your most recent complaint handled?” on a scale of 1, handled very poorly, to 10 handled very well



**Figure 18: Impact of ease of making a complaint on satisfaction with NSW Government services**

Customers were asked “How difficult or easy was it to make your complaint?” on a scale of 1, very easy, to 10, very difficult



# Detailed Findings

1. Overall performance - *Key Findings 1, 2 and 3*

2. Performance against customer satisfaction drivers - *Key Findings 4 and 5*

3. Complaints handling - *Key Finding 6*

4. Perceptions of online services - *Key Findings 7 and 8*

5. Variation in performance across services – *Key Finding 9*

6. Comparison of performance to other jurisdictions – *Key Finding 10*



## Areas covered in this section

1. Current and Preferred Service Channel for Accessing Government Services.....p. 56
2. Customer Views on NSW Government Online Services.....p. 58
3. Customer Identified Drivers of Digital Adoption.....p.60

## Detailed Findings Summary

- Face-to-face is the most commonly used and preferred channel to access NSW Government services by customers, with online the second most commonly used channel for consumers and third for businesses.
- Across channels, online services were perceived to deliver a more positive experience than other channels with higher than average customer satisfaction, linked to shorter wait times and simpler processes.
- Customers are positive about their experiences interacting with services online, however the sufficiency of content and ease of navigation are areas of higher dissatisfaction.
- Few customers have used a smartphone to carry out their online dealings with NSW Government services, and those who have are less satisfied with the overall experience.
- Improvements to navigation, security, availability and accuracy of content of online services is most likely to increase customer satisfaction with and usage of these services.

## Key Findings Covered in this Section:

**Key Finding 7:** Customers' needs for improved access to information and simplicity and efficiency in processes can be enhanced through online services which are delivering positive experiences.

**Key Finding 8:** Improvements to navigation, security and content are most likely to increase usage of online services.



# Current and Preferred Service Channel for Accessing Government Services



Face-to-face is the most commonly used and preferred channel to access NSW Government services by customers, with online the second most commonly used channel for consumers and third for businesses.

Customers were asked the channels through which they have had direct dealings with NSW Government services in the last 12 months and their preferred channels for dealing with these services in the future.

Across channels, face-to-face is the most commonly used channel to access NSW Government services by customers (59% of consumers and 52% of businesses, refer to Figure 19). Face-to-face is also the most commonly preferred channel to deal with NSW Government services (39% for consumers and 38% for businesses, refer to Figure 20).

For consumers, online is the second most common channel through which they have had direct dealings with NSW Government services after face-to-face (52% have interacted with a service face to face and 39% online). Online is also the second most commonly preferred channel for their interactions with NSW Government services (39% prefer face-to-face followed by 28% who prefer online).

For businesses, online is the third most common channel through which they have direct dealings with NSW Government services, behind face-to-face and telephone (52% face-to-face, 45% telephone, 39% online). However, online is the second most commonly preferred channel for business interactions with NSW Government services (38% prefer face-to-face followed by 24% who prefer online).

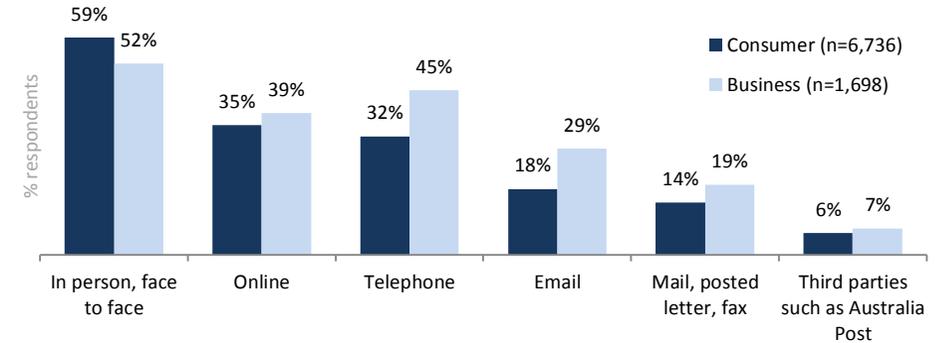
While 14% consumers and 19% of businesses have interacted via mail or fax in the last 12 months, only 3% identify this to be their preferred channel.

41% of consumers and 51% of businesses identified they had used multiple channels for carrying out dealings with NSW Government services in the last 12 months, supporting the need for consistency across channels.

“ I don't understand why in this day and age [departments] have to send me a letter.. You have my details why can't you email me?.. It would be easier and save paper, environment and costs. ”

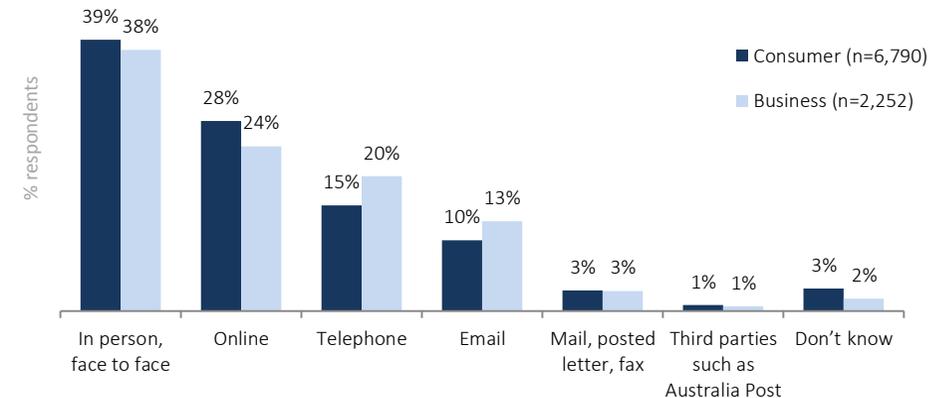
**Figure 19: Current contact methods used when dealing with NSW Government services**

Customers were asked “Which of the following contact methods have you used to carry out your direct dealings with the following services in NSW in the last 12 months? (Select all contact methods that apply)”



**Figure 20: Preferred contact method for dealing with NSW Government services**

Customers were asked, “Generally, which contact method do you most prefer to use when dealing directly with each of the following services in NSW?”



# Variation in Customer Satisfaction by Service Channel

Online services were perceived to deliver a more positive experience than other channels with higher than average customer satisfaction, linked to shorter wait times and simpler processes.

Satisfaction with NSW Government services is higher among customers who have accessed NSW Government services online compared to overall satisfaction (average satisfaction of 7.5 for consumers and 7.4 for businesses compared to overall average satisfaction 7.3 for consumers and 7.2 for businesses, refer to Figure 21).

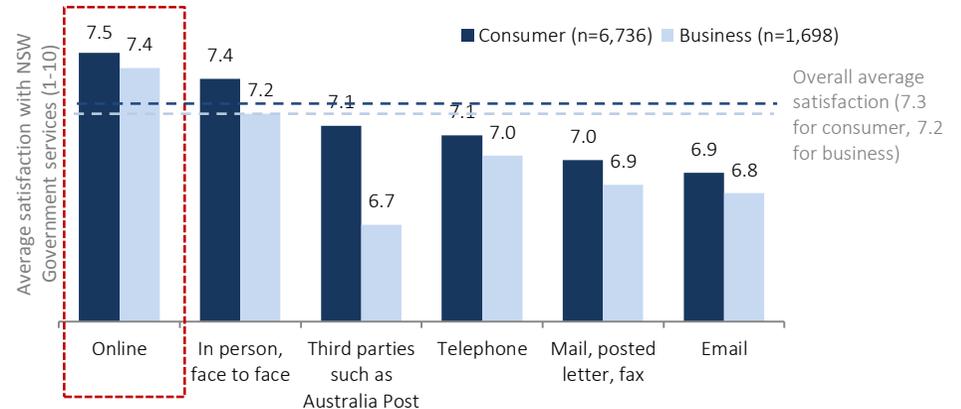
Customers who have accessed NSW Government services online also have more positive perceptions of processes, specifically that 'processes are designed to reduce wait times' (average score of 6.6 for online users compared to 6.2 for those who use other channels) and 'processes are easy to understand' (average score of 7.0 for online users compared to 6.6 for those who use other channels). Refer to Figure 22 for further detail.

These results suggest a strong linkage between customers' perceptions of the simplicity and efficiency of processes and the sufficiency and simplicity of online service delivery, which together impact the perceived ability of NSW Government employees to provide efficient and effective services to customers.

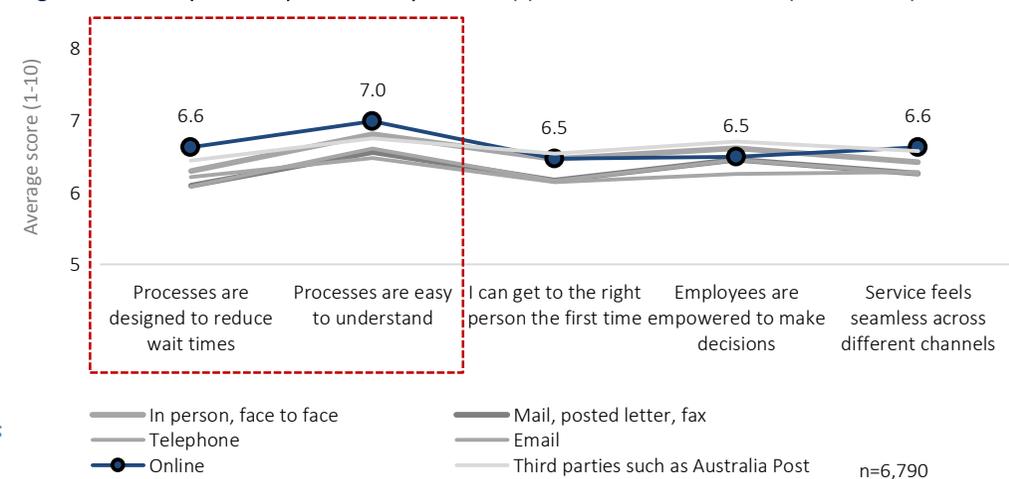
Customers who had carried out direct dealings with NSW Government services by telephone, mail and email were less satisfied with NSW Government services overall (refer to Figure 21). Furthermore, customers who have used these channels are less positive that NSW Government services employees 'are consistent' (average score of 7.0 for consumers and 6.9 for businesses compared to 7.3 for consumers and 7.4 for businesses across other channels) and that services feel seamless across channels (average score of 6.3 for consumers and 6.0 for businesses compared to 6.6 for consumers and 6.5 for businesses across other channel).

**Figure 21: Variation in overall satisfaction by channel**

Customers were asked, "Generally, which contact method do you most prefer to use when dealing directly with each of the following services in NSW?"



**Figure 22: Perceptions of processes by channel(s) used to access services (consumers)**



“Doing business with [department] is easy.. A lot of it you can do online.”

“Information is not consistent across channels... I can't find some information online and then I get different information on the phone.”



# Customer Views on NSW Government Online Services

Customers are positive about their experiences interacting with services online, however the sufficiency of content and ease of navigation are areas of dissatisfaction.

Customers who had gone online to carry out direct dealings with NSW Government services in the last 12 months were asked their overall satisfaction with using the channel to complete their task and their satisfaction with several aspects of their online experience.

The results indicate that customers are positive about their experiences interacting with services online. Average satisfaction with the overall experience of using the online service to complete their task is 7.6 for consumers and 7.4 for businesses.

Across attributes of the online service, customers are more satisfied that their 'information was handled securely' (average satisfaction of 7.9 out of 10 for consumers and businesses) and that 'content was current and accurate' (average satisfaction of 7.8 out of 10 for consumers and 7.7 out of 10 for businesses).

Dissatisfaction is higher with online services being 'simple and easy to find what I was looking for' (average satisfaction of 7.4 for consumers and 7.3 for businesses) and that 'content and support provided was sufficient to do everything I needed to do' (average satisfaction of 7.4 for consumers and 7.3 for businesses).

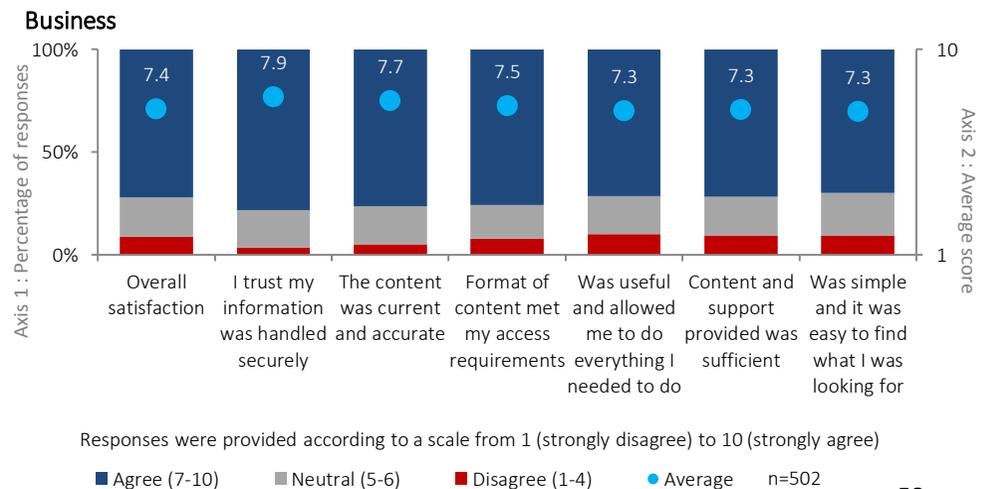
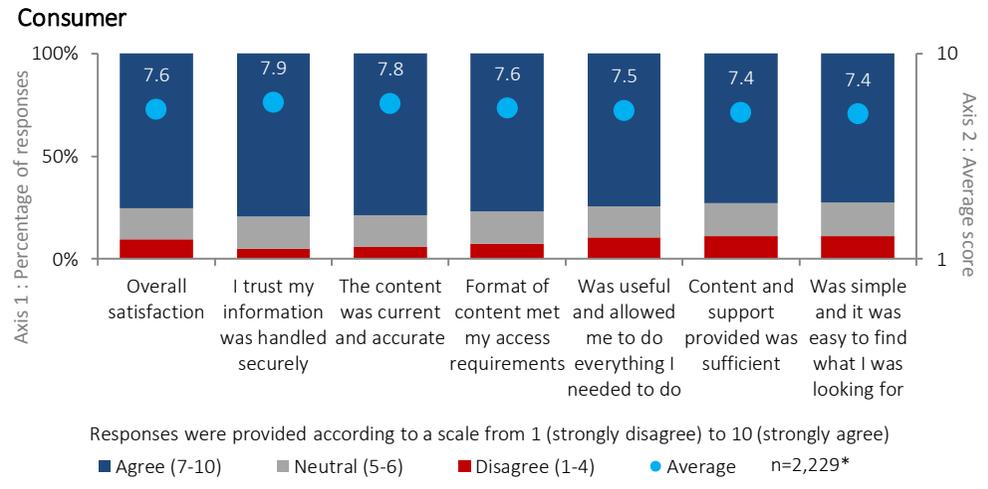
Analysis of the impact of individual attributes on overall satisfaction with the online services reveals that usefulness of the website (i.e. 'the website/app was useful and allowed me to do everything I needed to'), sufficiency of content and support, and simplicity and ease of using the website are the most important drivers of satisfaction with online experiences.

“ You have to search for the tab, search for the icon, then click through... It is hard to find things.. I want to be able to get to the information I need quickly.”

“ An hour and a half job turned into like 30 seconds on the internet.”

**Figure 23: Satisfaction with attributes of online services**

Customers were asked “Thinking about your experiences interacting with NSW services online in the last 12 months, to what extent do you agree or disagree with each of the following statements?”



\*Note: Data is not weighted to reflect characteristics of those who have used NSW Government online services. Business data weighted by location and size to population, n= total valid responses to question

# Device Used by Customers to Access Online Services

Fewer customers have used a smartphone to carry out dealings with NSW Government services, and those who have are less satisfied with the overall experience.

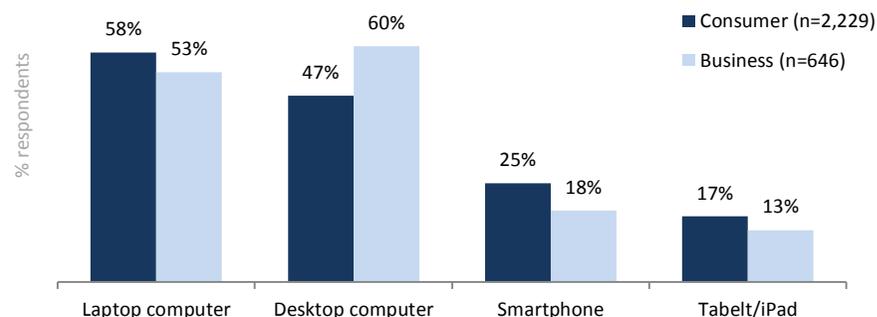
When dealing with NSW Government services online, customers more commonly access content from a laptop computer (58% of consumers and 53% of businesses) or desktop computer (47% of consumers and 60% of businesses). Fewer customers have used a smartphone or tablet to carry out direct dealings with NSW Government services (refer to Figure 24).

Overall satisfaction with using online services to complete the task varies by device used (refer to Figure 25). Specifically, customers who accessed online services via a smartphone device are less satisfied with the overall experience than those who used other devices (average satisfaction of 7.1 for consumers and 7.0 for businesses who had used a smartphone compared to overall average across devices of 7.4 for consumers and 7.3 for businesses).

“ Just develop an app.. Everything in one place... its easier. ”

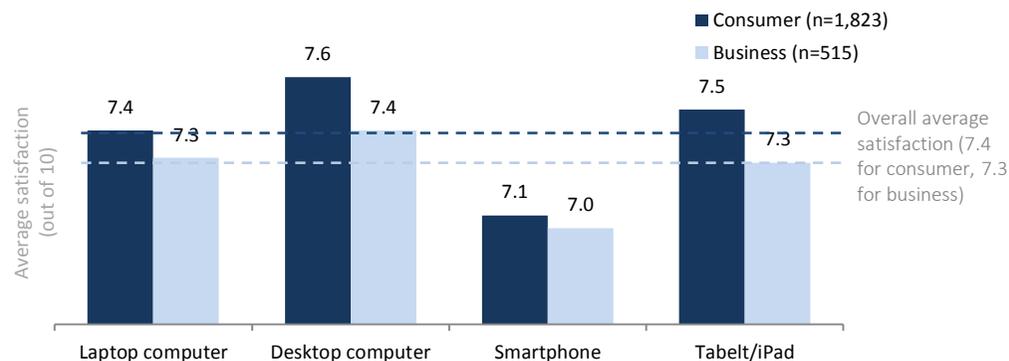
**Figure 24: Devices used when carrying out dealings with NSW Government services online**

Customers were asked “What devices did you use to access the online content? Please select all contact methods that apply”.



**Figure 25: Satisfaction with online services by device used**

Customers were asked “How satisfied were you with the overall experience of using the website/app to complete the task?”



# Customer Identified Drivers of Digital Adoption

Improvements to navigation, security, availability and accuracy of content is most likely to increase satisfaction with and usage of online service channels.

Customers who had not gone online to carry out direct dealings with NSW Government services in the last 12 months were asked to rate their level of agreement that certain improvements would encourage them to go online.

The results indicate that customers who currently use other channels would be more likely to go online if navigation was improved (i.e. I was easily able to find what I was looking for) followed by security (i.e. I was assured my information would remain confidential) and access (i.e. the service was available online). Refer to Figure 26 for further detail.

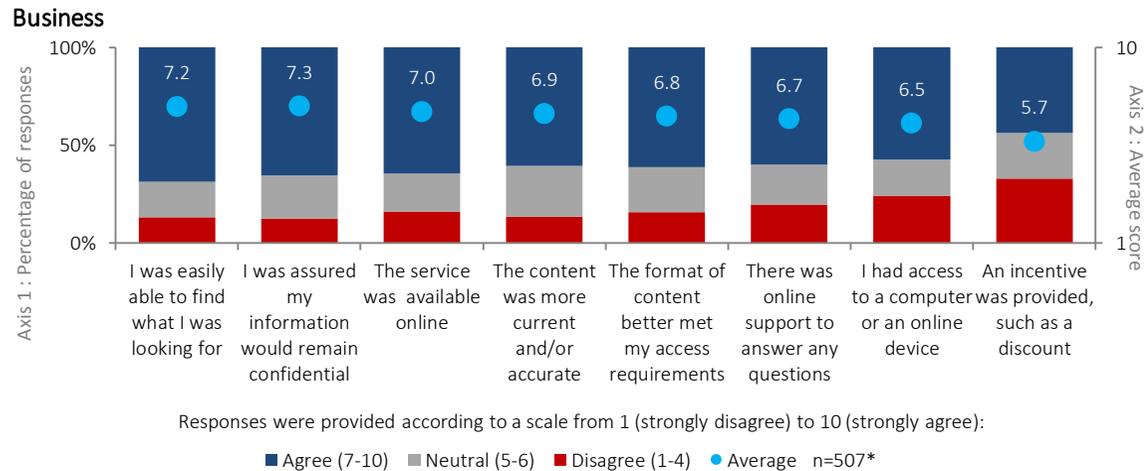
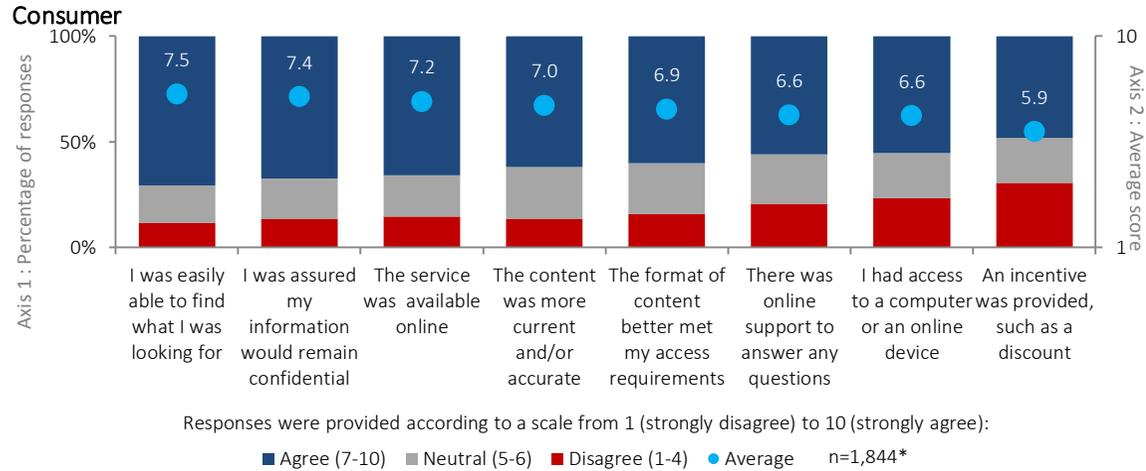
Incentives, such as a discount are least likely to increase adoption overall.

“The Government is going through a transition from face-to-face to online ... you just have to wait and people will get used to it.”

“I was expecting a nightmare experience like I have had in the past with government departments.. But it was really easy online.”

**Figure 26: Drivers of digital adoption: I would go online if...**

Customers were asked “You mentioned that you did not go online to access the service in the last 12 months. Please state your level of agreement or disagreement with the following statements in relation to the service in NSW? I would go online if....”



\*Note: Data is not weighted to reflect characteristics of those who do not currently use NSW Government online services. Source: Customer Service Commission, Customer Satisfaction Measurement Survey 2015 (Consumer data weighted by age, gender and region to population / business data weighted by location and size to population, n= total valid responses to question)

# Detailed Findings

1. Overall performance - *Key Findings 1, 2 and 3*

2. Performance against customer satisfaction drivers - *Key Findings 4 and 5*

3. Complaints handling - *Key Finding 6*

4. Perceptions of online services - *Key Findings 7 and 8*

5. Variation in performance across services – *Key Finding 9*

6. Comparison of performance to other jurisdictions – *Key Finding 10*



## Areas covered in this section

1. Variation in Drivers of Satisfaction Across NSW Government Services....p. 63
2. Variation in Consumer Channel Use and Preference Across Services.....p. 64

## Detailed Summary Findings:

- While common satisfaction drivers have been identified for whole-of-government, further analysis reveals the relative importance of satisfaction drivers vary across services. This implies a need for targeted services priorities to support whole-of-government outcomes.

## Key Findings Covered in this Section:

**Key Finding 9:** The relative priority of satisfaction drivers varies across services implying a need for targeted service actions to support whole-of-government outcomes.



# Variation in Drivers of Satisfaction Across NSW Government Services



Further analysis reveals that drivers of satisfaction for individual government services are aligned to those for whole-of-government, however the relative importance of drivers vary across services.

While common satisfaction drivers have been identified for whole-of-government, the relative importance of these drivers vary across services (refer to Figure 27).

Efficiency and effectiveness of employees, communication and honesty and integrity of employees are satisfaction drivers for the majority of services, and in particular are the most important drivers of satisfaction for services which have customers with complex needs such as Public Hospitals, Courts, Police, Public Housing, Child Welfare and, Public Schools and TAFE.

Access to information (which includes access to information and making best use of online services) is a more important driver of satisfaction for transactional and transport services such as Major Roads, Public Transport, Water Supply and, Car and Boat Registration.

Transparency in decision making is a more important driver of satisfaction for Major Roads and the Fire Brigade as well as Consumer Affairs, Courts, Police, Public Housing.

Simplicity and efficiency of processes are more important drivers of satisfaction for Major Roads, Car and Boat Registration, and Services for Older People while for the remainder of services these drivers typically manifest themselves through the efficiency and effectiveness of employees.

The differences in drivers of satisfaction implies a need for targeted service priorities to support whole-of-government outcomes.

Figure 27: Variation in importance of satisfaction drivers by services

	Efficiency and effectiveness of employees	Communication	Honesty and integrity of employees	Access to information	Privacy	Transparency	Simplicity and efficiency of processes	Employee autonomy
Major Roads (n=225)				Highly important driver of satisfaction		Moderately important driver of satisfaction		
Fire Brigade (n=91)				Highly important driver of satisfaction		Moderately important driver of satisfaction		
Public Transport (n=581)	Moderately important driver of satisfaction			Highly important driver of satisfaction				
Water Supply (n=347)	Moderately important driver of satisfaction			Highly important driver of satisfaction				
Environ. Protection (n=92)							Moderately important driver of satisfaction	
Registration (n=471)				Highly important driver of satisfaction				
Services for Older People (n=213)							Moderately important driver of satisfaction	
Disability Serv. (n=173)	Moderately important driver of satisfaction							
Public Hospitals (n=617)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Consumer Affairs (n=181)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Courts (n=194)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Police (n=358)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Public Housing (n=148)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Child Welfare (n=91)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Document. Services (n=105)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Public Schools/TAFE (n=529)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Art Galleries (n=233)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					
Emergency Services (n=140)	Highly important driver of satisfaction	Highly important driver of satisfaction	Highly important driver of satisfaction					

Legend: Processes Goals Employee attributes Highly important driver of satisfaction Moderately important driver of satisfaction

Note: Only services with a sample size of >30 are reported. The excluded services are: Business Advisory Services (n=28), Agricultural Advice (n=19), and Prisons (n=28)



# Variation in Consumer Channel Use and Preference Across Services



Face-to-face is the most commonly used and preferred channel for high-touch services while online is the more commonly used and preferred for transactional services and transport.

Customers were asked the channels through which they have had direct dealings with NSW Government services in the last 12 months and their preferred channels for dealing with these services in the future.

Results indicate large variation in consumers' channel use and preference across services.

Face-to-face is the most commonly used and preferred channel for consumers to carry out direct dealings with Public Hospitals and Ambulance Services (used by 89% of consumers and preferred by 63%), Police Services (used by 75% and preferred by 57%), Art Galleries and Museums (used by 83% and preferred by 50% of consumers), and Public Schools and TAFE (used by 75% of consumers and preferred by 48%).

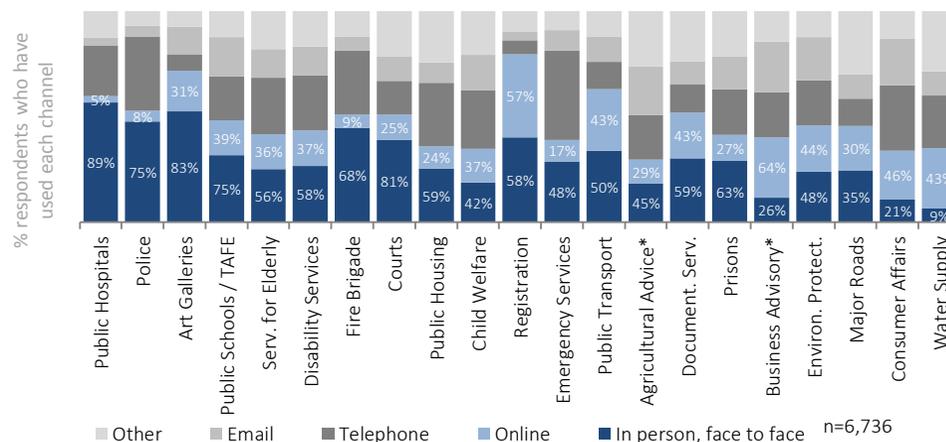
Online is the most commonly used and preferred channel for transactional services such as Water Supply (used by 43% of consumers and preferred by 30%), Car and Boat Registration (used by 57% and preferred by 52%), Business Advisory Services (used by 64% of consumers and preferred by 31%) and Documentation Services (used by 43% and preferred by 40% of consumers). Online is also a more commonly used and preferred channel for carrying out direct dealings with Public Transport (used by 43% of consumers and preferred by 39%) and Major Roads (used by 30% of consumers and preferred by 38%).

Refer to Figures 28 and 29 for consumer channel use and preference for all services included in the survey.

“I don't mind how they communicate with me.. Just tell me if my inquiry is going any further.. Do I need to do anything?”

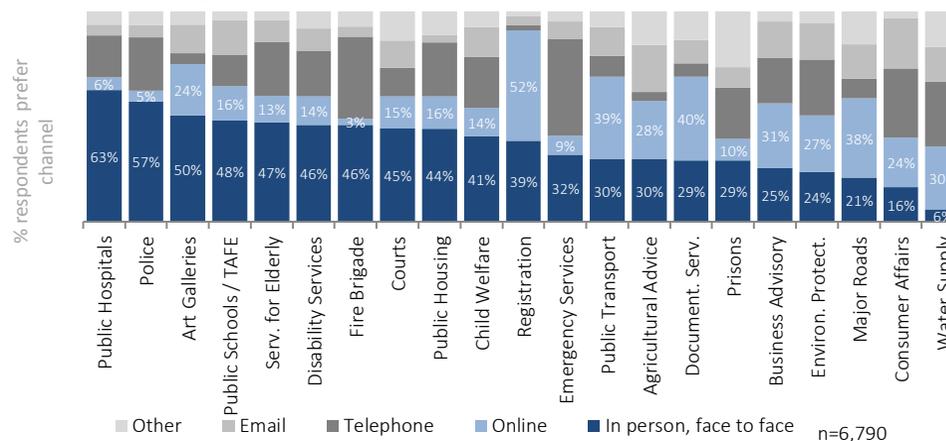
**Figure 28: Variation in current consumer contact methods across NSW Government services**

Customers were asked, “Which of the following contact methods have you used to carry out your direct dealings with the following services in the last 12 months? (Select all contact methods that apply)”



**Figure 29: Variation in consumers preferred contact methods across NSW Government services**

Customers were asked, “Generally, which contact method do you most prefer to use when dealing directly with each of the following services in NSW?”



\*Note: Small sample size (n<50)

# Variation in Business Channel Use and Preference Across Services

Businesses have similar channel preferences to consumers; face-to-face is the most commonly used and preferred channel for high-touch services while online is the more commonly used and preferred for transactional services and transport.

Results for businesses are consistent with consumer results, indicating large variation in channel use and preference across services.

Face-to-face is the most commonly used and preferred channel for businesses to carry out direct dealings with Police Services (used by 80% of businesses and preferred by 71%), Art Galleries (used by 77% of businesses and preferred by 49%), Public Hospitals and Ambulance Services (used by 75% of businesses and preferred by 52%), and Public Schools and TAFE (used by 71% of consumers and preferred by 47%). These top four services with highest use and preference for face-to-face are consistent across consumers and businesses.

Online is the most commonly used and preferred channel by businesses for transactional services such as Car and Boat Registration (used by 67% of businesses and preferred by 55%), Documentation Services (used by 47% and preferred by 47%) and . Online is also more commonly used and preferred channel for carrying out direct dealings with Public Transport (used by 41% of businesses and preferred by 35%) and Major Roads (used by 42% and preferred by 34%).

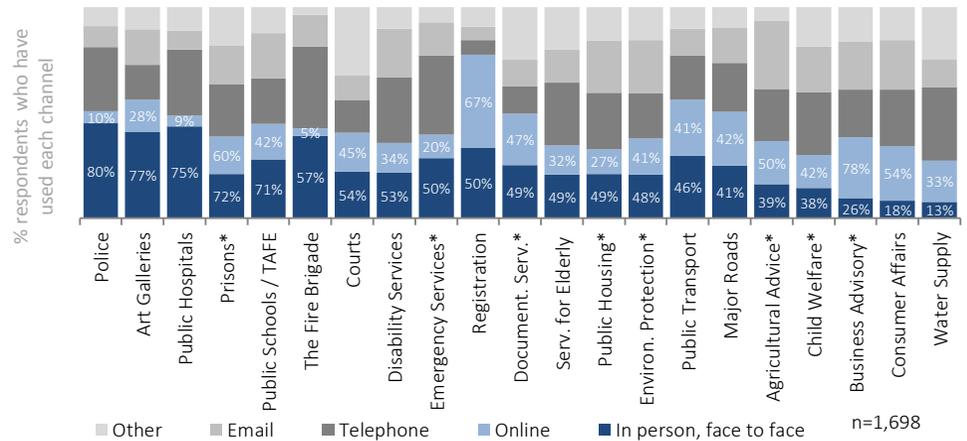
Refer to Figures 30 and 32 for channel use and preference among businesses for all services included in the survey.

“I need an *immediate response*... Everything concerning communications has to be 100% if you want to be the worlds best”

“Our work doesn't finish at 5pm on a Friday... *Businesses are open 7 days a week* so why can't the supporting services be open the same hours?”

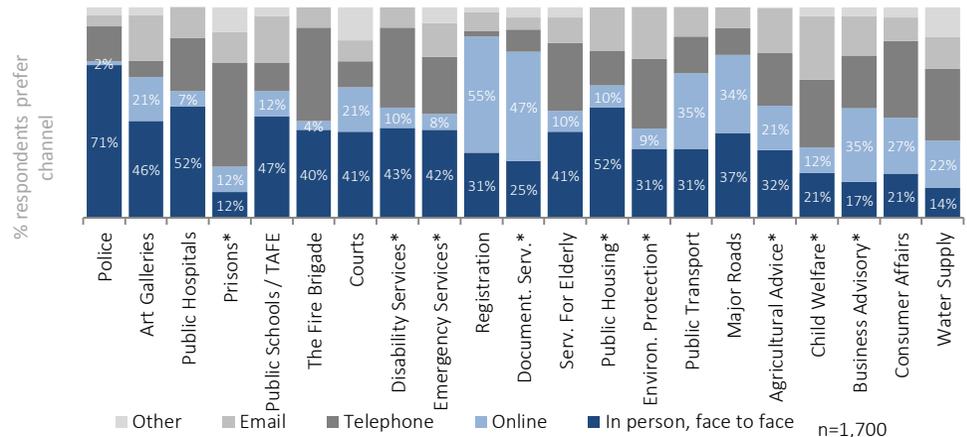
**Figure 30: Variation in current business contact methods across NSW Government services**

Customers were asked, “Which of the following contact methods have you used to carry out your direct dealings with the following services in the last 12 months? (Select all contact methods that apply)”



**Figure 31: Variation in business preferred contact methods across NSW Government services**

Customers were asked, “Generally, which contact method do you most prefer to use when dealing directly with each of the following services in NSW?”



\*Note: Small sample size (n<50)

# Detailed Findings

1. Overall performance - *Key Findings 1, 2 and 3*
2. Performance against customer satisfaction drivers - *Key Findings 4 and 5*
3. Complaints handling - *Key Finding 6*
4. Perceptions of online services - *Key Findings 7 and 8*
5. Variation in performance across services – *Key Finding 9*
6. Comparison of performance to other jurisdictions – *Key Finding 10*

## Areas covered in this section

1. Comparison of Performance Against Measures Across Jurisdictions.....p. 68
2. Customer Perceptions of the Public Service 'Brand' Across Jurisdictions.....p. 70
3. Comparison of Performance Against Drivers of Satisfaction Across Jurisdictions.....p.72
4. Comparison of Complaints Handling Processes Across Jurisdictions.....p.76
5. Differences in Online Service Adoption and Experiences Across Jurisdictions.....p.79

## Detailed Findings Summary:

- Consumers and businesses in Victoria, Queensland, New Zealand and the United Kingdom completed the Customer Satisfaction Measurement Survey with respect to their government services in order to determine how NSW Government is performing in comparison. The purpose of this analysis was to apply a consistent methodology for measuring the quality of services delivered by governments in order to enable comparative cross-jurisdiction analysis on areas of importance in government services delivery. Note, structural/geographic or political differences across the different jurisdictions have not been corrected for.
- Results indicate that NSW Government services overall are performing on par with other Australian Eastern States, NZ and the UK in customers perceptions of the overall quality and satisfaction with services provided by their government. However, across jurisdictions, government services are consistently not performing to customer expectations.
- NSW Government has a positive 'brand' perception when compared to other industries, which is on par with the UK public service, VIC and QLD and ahead of NZ.
- Similar trends are observed in the areas of higher and lower performance of government services across employee, values, process and goals related attributes. NSW leads other Australian States, NZ and UK in businesses perceptions of government services performance against 'focus on addressing customer needs' and 'making use of online services to improve convenience and efficiency for customers'.
- There are differences in performance across jurisdictions by services and channels which present opportunities for cross-jurisdiction learnings particularly in relation to online. While more customers have gone online to interact with government services in NSW than in other jurisdictions, satisfaction with online services experience in NSW is behind the UK.

## Key Findings Covered in this Section:

**Key Finding 10:** Compared to other jurisdictions, NSW Government services overall are performing on par, however differences appear in 'brand' scores and by services and channels.



# Comparison of Performance Against Customer Satisfaction and Expectation

At a whole-of-government level, NSW is performing on par with other Australian Eastern States, NZ and the UK in customers perceptions of the overall quality and satisfaction with services provided by their government.

Results indicate that NSW is on par with other Australian Eastern States, NZ and the UK in customers perceptions of the overall satisfaction with services provided by their government in the last 12 months (average satisfaction ranging from 7.0-7.3 for consumers and businesses, refer to Figure 32 for breakdown by jurisdiction).

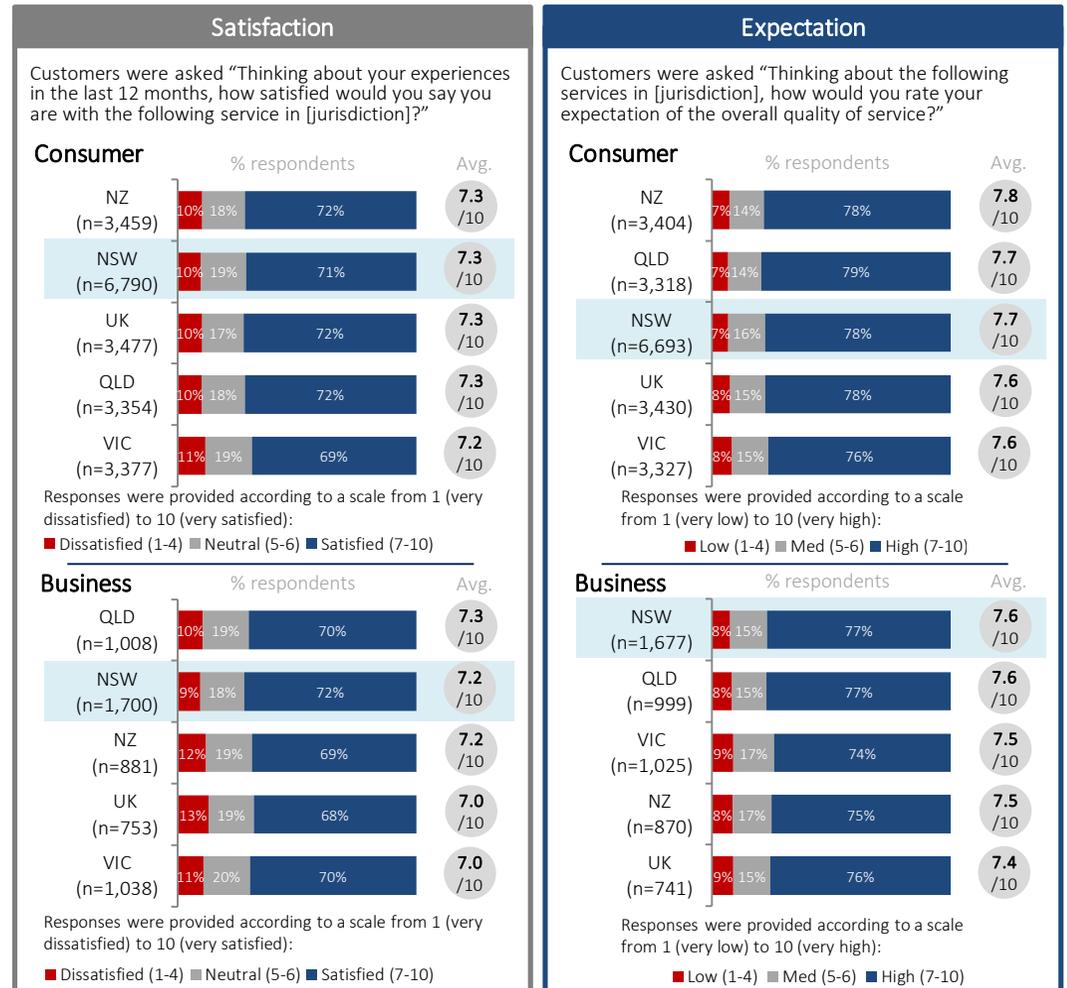
NSW is also performing in line with other Australian Eastern States, NZ and the UK in customers level of expectation with services provided by their government (average expectation score ranging from 7.4 to 7.8 for consumers and businesses). High expectations across all jurisdictions suggest customers previous experiences (prior to the last 12 months) have also been positive as the more satisfied customers are with their experiences with government services, the higher their expectations are for future interactions (correlation between satisfaction and expectation is 0.77 for consumers and 0.80 for businesses).

Overall there are minimal differences in the perceived overall performance of government services across jurisdictions. This is to be expected given the scale of the surveys and the similar political and social structures across the jurisdictions selected. Larger differences are apparent in relative performance across individual services and channels which present opportunities for cross-jurisdiction learnings.

“I just think there is a lot more that could be done compared to similar services from other countries such as the UK.”

“We [citizens of NSW] live in paradise compared to some other countries.”

Figure 32: NSW consumer and business satisfaction and expectation compared to other jurisdictions



# Comparison of Gap to Expectations and Ideals Across Jurisdictions

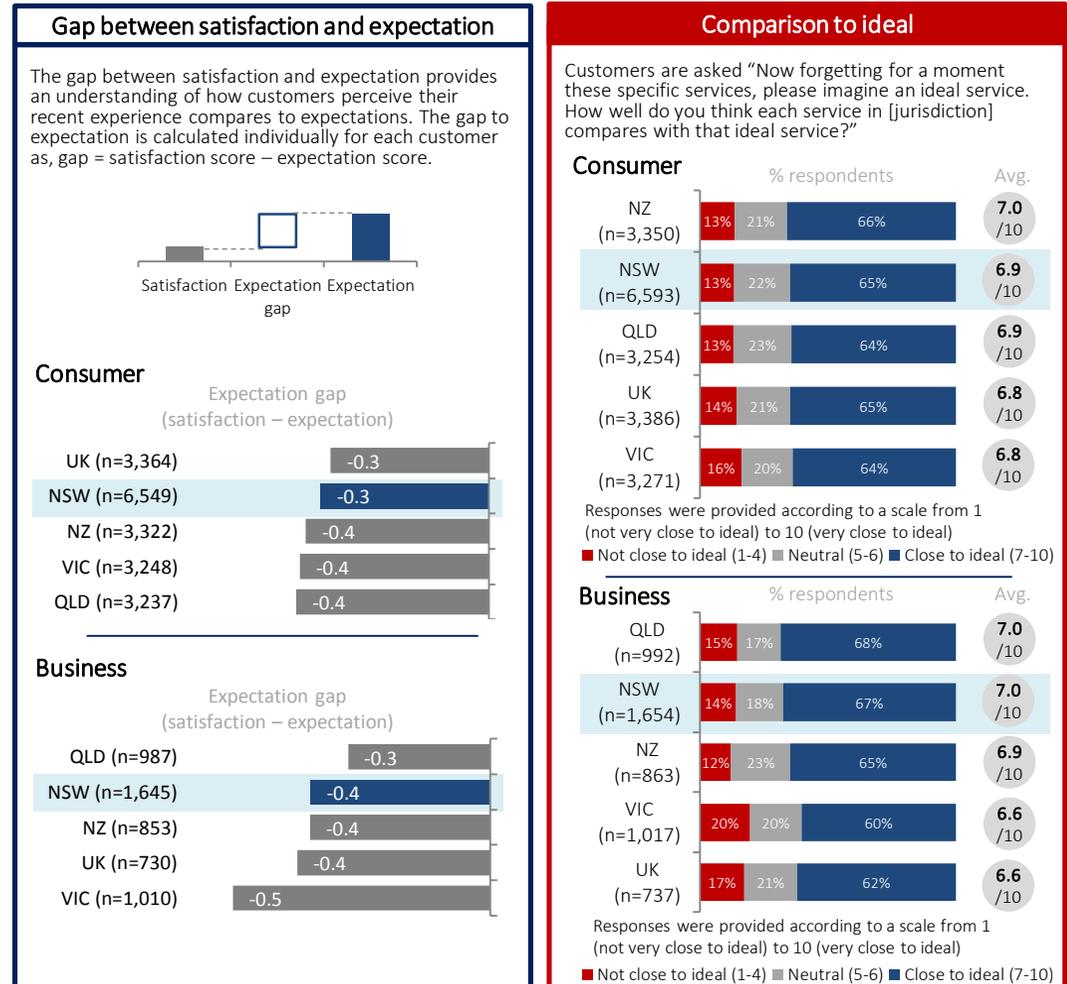
Across Australian Eastern States, NZ and the UK, government services are consistently not performing to customer expectations.

Customer satisfaction with the experience delivered by government services in NSW, VIC, QLD, NZ and the UK is consistently below expectations (refer to Figure 33).

For consumers, the average gap between satisfaction and expectation is -0.3 in NSW which is on par with other jurisdictions (ranging from -0.3 to -0.4). Furthermore, 65% of consumers in NSW agree that the service they received is close to their 'ideal' experience (7-10 out of 10). This is consistent with other jurisdictions where the percentage who agree the service is close to ideal ranges from 64% to 66%.

Among businesses, NSW Government services perform in line with QLD and NZ in the gap to expectations (expectation gap ranging from -0.3 to -0.4) and performance compared to an ideal service (percentage agree the service is close to ideal ranging from 65% to 68% across NSW, QLD and NZ). Comparatively, the UK and VIC are performing slightly below other jurisdictions with a higher expectation gap and fewer businesses agreeing their service is close to an ideal (expectation gap ranging from -0.4 to -0.5 and percentage agree the service is close to ideal ranging from 60% to 62%).

**Figure 33: Comparison of performance to expectations and perceptions of an ideal service across jurisdictions**



# Customer Perceptions of the Public Service 'Brand' Across Jurisdictions



NSW Government has a positive 'brand' perception when compared to other industries, which is on par with the UK Public Service, VIC and QLD and ahead of NZ.

**Figure 34: Comparison of Public service brand perceptions across jurisdictions**

Customers were asked "Thinking about all your experiences with each of the following [jurisdiction] industries and public services over the previous 12 months, how satisfied would you say you are with them? "

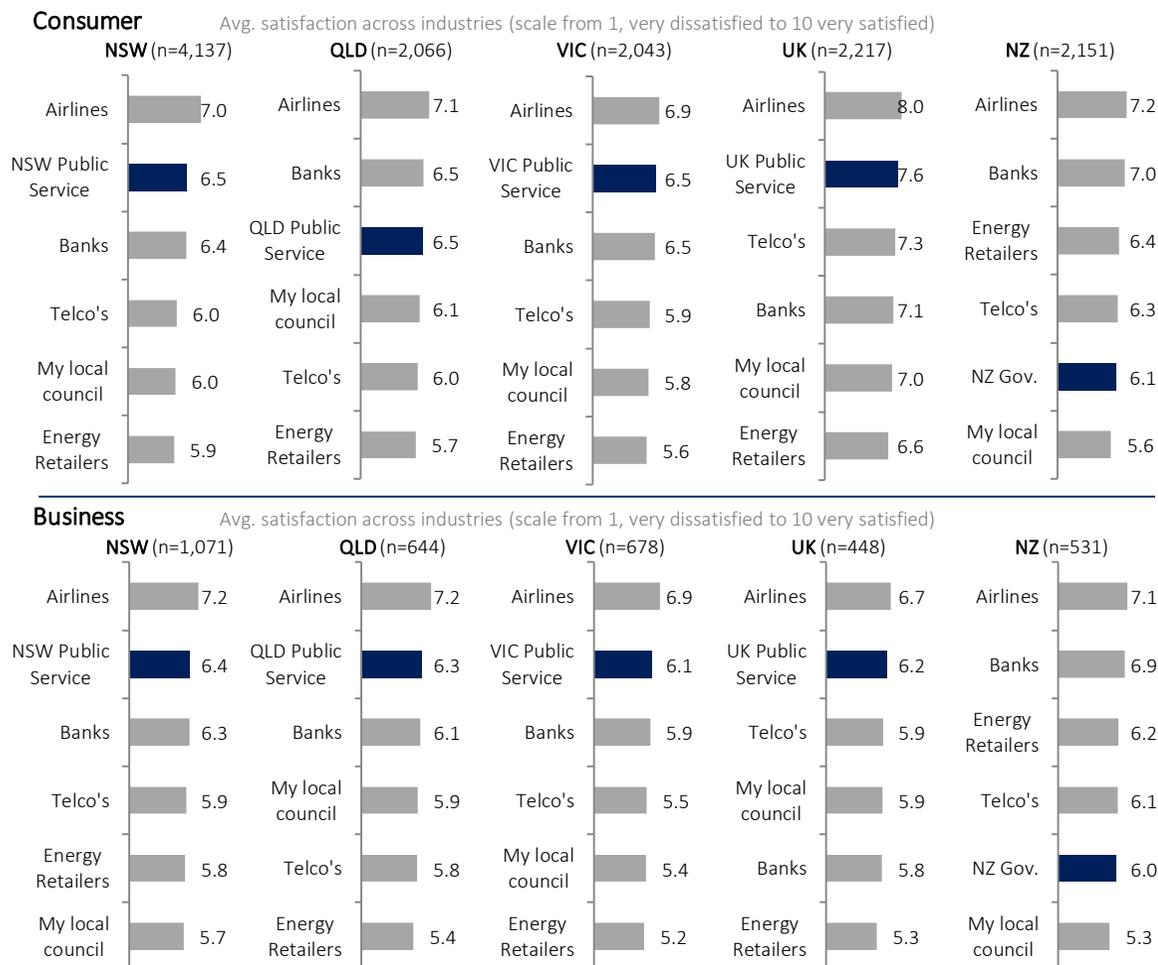
Customers across jurisdictions were asked to rate their satisfaction with a range of industries, to compare relative perceptions of the public service 'brand.'

NSW Government has a positive 'brand' perception compared to other industries, being on par with banks but below airlines. This trend is consistent across VIC, QLD, and the UK where Public Services ranks similarly to airlines and banks on average customer satisfaction (refer to Figure 34).

Perceptions of the NZ Government overall however are lower than in other jurisdictions. Satisfaction with the NZ Government ranks fifth below Airlines, Banks, Energy Retailers and Telecommunications providers.

Across all jurisdictions, the local council consistently ranks in the bottom two across industries in average satisfaction, particularly amongst consumers, indicating a relatively poorer wide-spread 'brand' perception with this level of government.

Satisfaction with the Public Service 'brand' is also significantly less than satisfaction with government services overall across all jurisdictions, highlighting a consistent disconnect between customers' experiences of service delivery by government services and their perceptions of the Public Service generally.



# Comparison of Descriptors of the Public Service 'Brand'

Consistent with findings against 'brand', sentiment towards the NSW Public Service are also on par with the UK Public Service, VIC and QLD and ahead of NZ.

Customers across jurisdictions were asked to identify words that they associate with their respective Public Service. The results provide insight into the relative perception of NSW Public Services compared to other jurisdictions.

Consistent with findings against the 'brand', results indicate that sentiments towards the NSW Government are in line with sentiments towards the UK public service, VIC and QLD and ahead of NZ (refer to Figure 35).

The words most commonly used by customers to describe the NSW, VIC, QLD and UK Public Services overall are the positive descriptors of helpful, capable, friendly and knowledgeable, revealing a level of consistency in perceptions of government across Australian Eastern States. Moreover, NSW leads other Australian Eastern States and the UK in Business perceptions that the Public Service is friendly, knowledgeable and respectful.

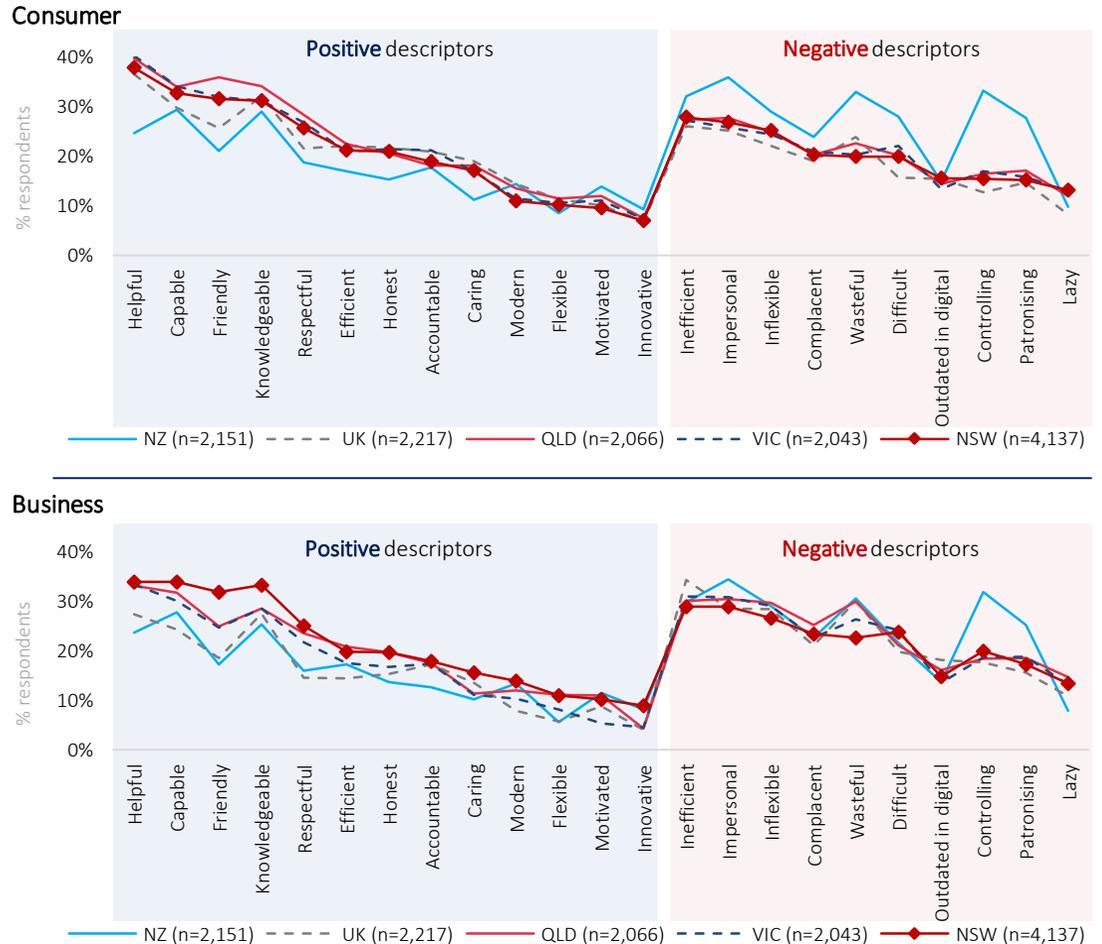
Following this, the next most commonly selected words to describe the Public Service in NSW, VIC, QLD and the UK are the negative descriptors of inefficient, impersonal and inflexible.

The NZ Government is most commonly described by its customers as impersonal (selected by 36% of consumers and 34% of businesses), controlling (selected by 33% of consumers and 32% of businesses), wasteful (selected by 33% of consumers and 31% of businesses) and inefficient (selected by 32% of consumers and 30% of businesses).

Across all jurisdictions, very few customers describe their Public service to be innovative.

**Figure 35: Comparison of descriptors of the Public Service overall across jurisdictions**

Customers were asked "Thinking now about the NSW Public Service overall, and all of the services and agencies which fall under it, which of the following words would you use to describe the NSW Public Service?"



# Comparison of Customer Views on Performance Against Employee Attributes

NSW Government services overall perform on par with other jurisdictions in consumers perceptions of the performance of their employees, and are slightly ahead of other jurisdictions in business perceptions of employees.

Across jurisdictions, similar trends are observed in the perceptions of government services employees performance against attributes (refer to Figure 36).

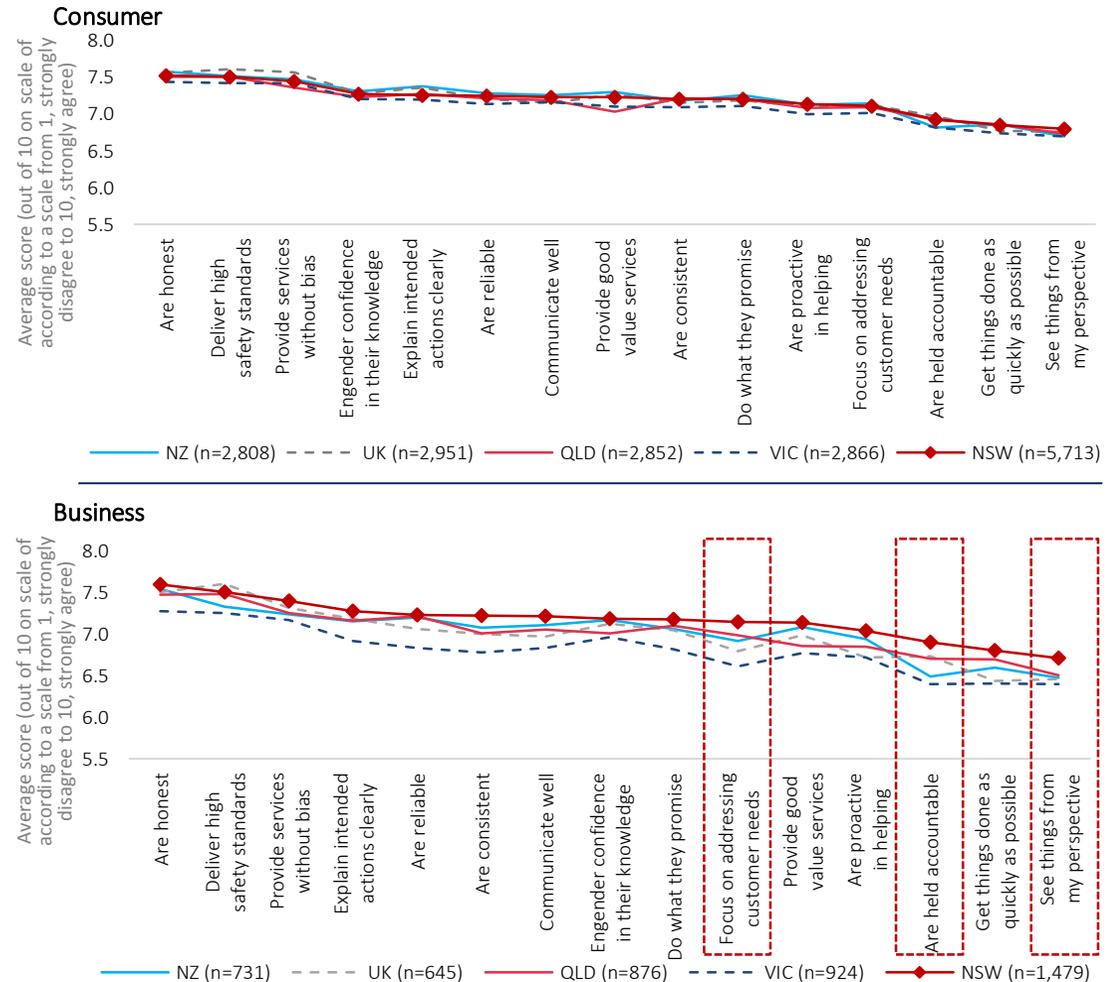
Government service employees are consistently rated highest against the attributes of 'are honest', 'deliver high safety standards' and 'provide services without bias' (average scores ranging from 7.4 to 7.6 for consumers and 7.3 to 7.6 businesses across all attributes) and lowest against the attributes of 'are held accountable', 'get things done as quickly as possible' and 'see things from my perspective' (average scores ranging from 6.8 to 7.0 for consumers and 6.4 to 6.9 for businesses across all attributes). Results suggest efficiency and customer focus are consistent areas where government service employees could improve.

Compared to NSW, NZ consumers rate NZ Government employees more favourably on communication in particular, explaining intended actions clearly and doing what they promise.

Among businesses, NSW leads other jurisdictions in perceptions of government service employees (refer to the right highlight on Figure 36), including 'focus on addressing customer needs' (average score of 7.1 in NSW compared to 6.6, 7.0, 6.9 and 6.8 in VIC, QLD, NZ and the UK respectively), 'are held accountable' (average score of 6.9 out of 10 in NSW compared to 6.4, 6.7, 6.5 and 6.7 in VIC, QLD, NZ and the UK respectively), and 'see things from my perspective' (average score of 6.7 out of 10 in NSW compared to 6.4, 6.5, 6.5 and 6.5 in VIC, QLD, NZ and the UK respectively).

**Figure 36: Comparison of performance of against each of the employee attributes**

Customers are asked "Thinking now about its employees, to what extent do you agree or disagree that each of the following statements describes [a particular government service] in [jurisdiction]?"



# Comparison of Customer Views of Performance Against Values

NSW Government services overall perform on par with other jurisdictions in consumers perceptions of their performance against values, and are slightly ahead of other jurisdictions in business perceptions.

Across jurisdictions, there is little differentiation in the perceived performance of government services against Public Service values (refer to Figure 37).

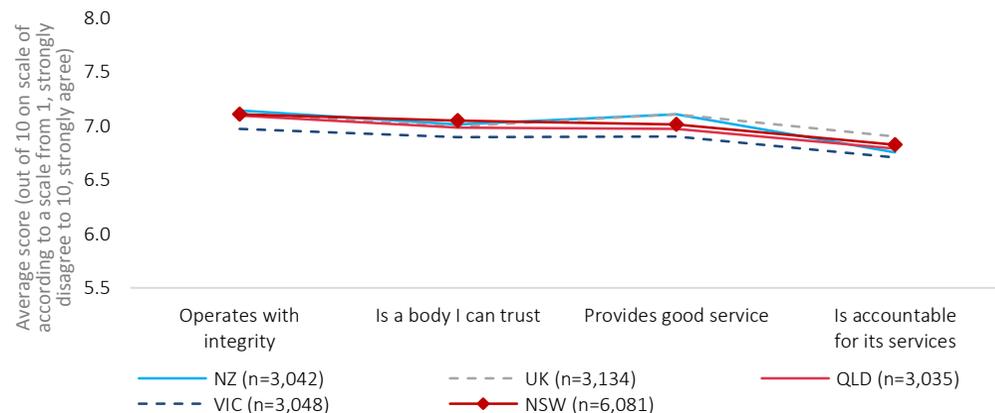
Government services are consistently rated highly in ‘operates with integrity’ (average scores ranging from 7.0 to 7.1 for consumers and 6.7 to 7.2 for businesses), ‘is a body I can trust’ (average scores ranging from 6.9 to 7.1 for consumers and 6.6 to 7.0 for businesses), and ‘provides good service’ (average scores ranging from 6.9-7.1 out of 10 for consumers and 6.5-7.0 out of 10 for businesses). In comparison to the other values, government services are consistently rated lower across jurisdictions on ‘is accountable for its services’ (average score ranging from 6.7 to 6.9 for consumers and 6.3 to 6.8 for businesses).

Among businesses, NSW leads other jurisdictions in perceptions that government services uphold each of the values. In particular, NSW leads other jurisdictions in perception of performance against the value of ‘operates with integrity’ (average score of 6.8 in NSW compared to 6.3, 6.6, 6.6 and 6.5 in VIC, QLD, NZ and the UK respectively. Refer to the red highlight in Figure 27). This is consistent with more positive perceptions of NSW Government services among businesses for several employee attributes relating to customer focus and accountability.

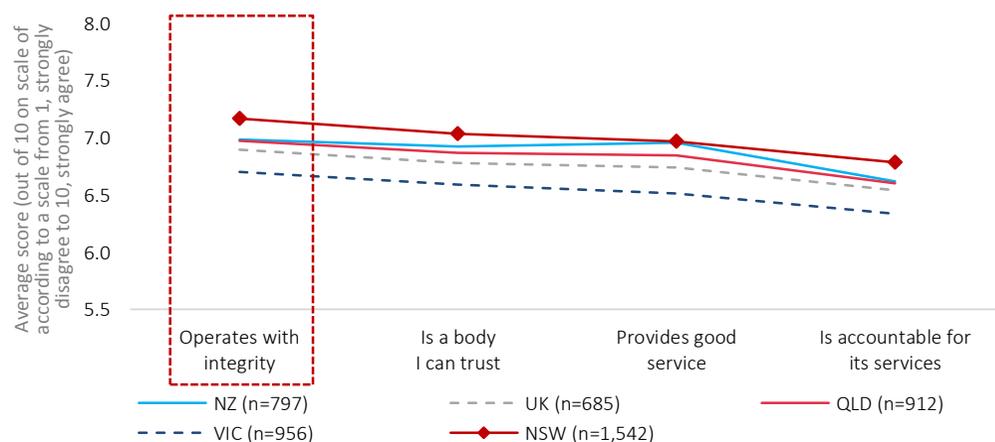
**Figure 37: Comparison of performance against each of the values**

Customers were asked “Thinking about the values that they uphold, to what extent would you agree with each of the following statements when thinking about [a particular government service] in [jurisdiction]?”

## Consumer



## Business



# Comparison of Customers View on Performance Against Process Attributes

Across jurisdictions, customers consistently rate government services lower against process attributes, in particular ‘I can get to the right person the first time’ and ‘processes are designed to reduce wait times’.

Across jurisdictions, there is little differentiation in the perceived performance of government services against processes related attributes, consistent with findings against employees and values (refer to Figure 38).

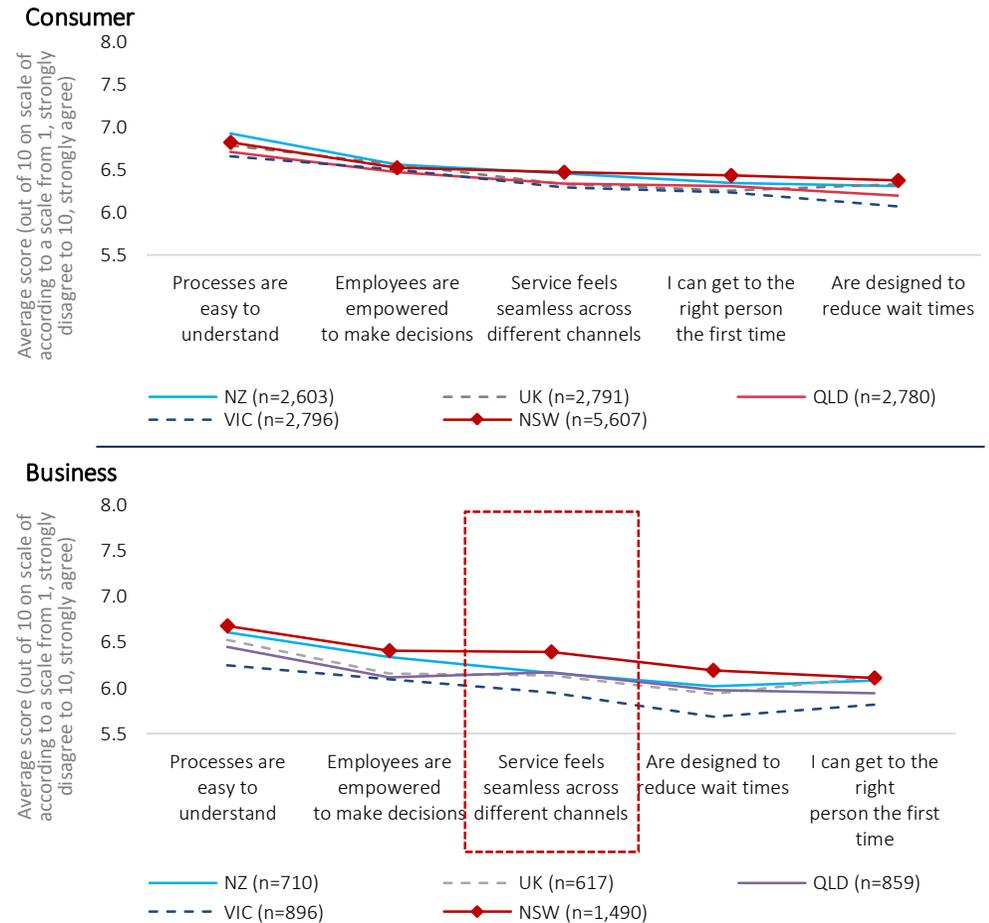
Government services are consistently rated highest on ‘processes are easy to understand’ (average scores ranging from 6.7 to 6.9 for consumers and 6.2 to 6.7 for businesses) and lowest on ‘I can get to the right person the first time’ (average scores ranging from 6.2 to 6.4 for consumers and 5.7 to 6.2 for businesses) and ‘processes are designed to reduce wait times’ (average scores ranging from 6.1 to 6.4 for consumers and 5.8 to 6.1 for businesses).

Among businesses, NSW leads other jurisdictions in delivering seamless service across channels (average score of 6.4 in NSW compared to 5.9, 6.2, 6.2 and 6.1 in VIC, QLD, NZ and the UK respectively. Refer to red highlight in Figure 38). This is consistent with more positive perceptions of NSW Government services among businesses for several employee attributes relating to customer focus and accountability and perceptions that government services ‘operate with integrity’.

Overall and across jurisdictions, perceptions of government services performance against processes is lower than employees and values, suggesting that delivering simple and efficient processes is a challenge for all governments.

**Figure 38: Comparison of performance against each of the process attributes**

Customers are asked “Thinking now about its processes (across any of the contact methods you have encountered), to what extent do you agree or disagree that each of the following statements describes [a particular government service] in NSW?”



# Comparison of Customer Views on Performance Against Goals

Across jurisdictions, customers were positive about the performance of government services in ‘safeguarding privacy and confidentiality’ but were less positive in their perceptions of transparency and consultation in decision making.

Across jurisdictions, there is little differentiation in the perceived performance of government services against goals relating to the access to information and transparency of government services (refer to Figure 39).

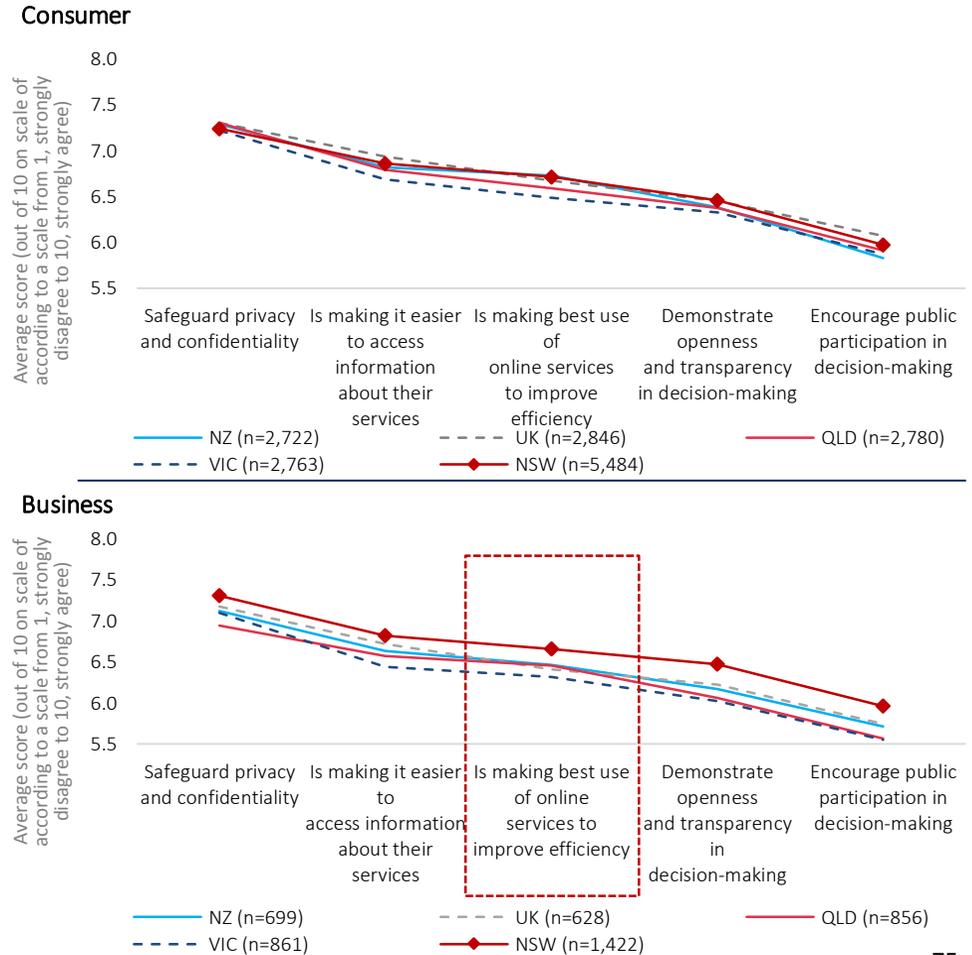
Government services are consistently perceived to be performing positively against ‘safeguard privacy and confidentiality’ (average scores ranging from 7.2 to 7.3 for consumers and 6.6 to 7.3 for businesses).

Government services across all jurisdictions are perceived to be performing least positively on ‘demonstrate openness and transparency in decision-making’ (average scores ranging from 6.3 to 6.5 for consumers and 6.0 to 6.5 for businesses) and ‘encourage public participation in decision making’ (average scores ranging from 5.8 to 6.1 for consumers and 5.5 to 6.0 for businesses).

Among businesses, NSW leads other jurisdictions in ‘is making best use of online services to improve convenience and efficiency for customers’ (average score of 6.7 out of 10 in NSW compared to 6.3, 6.5, 6.5 and 6.4 in VIC, QLD, NZ and the UK respectively. Refer to red highlight in Figure 39). This is consistent with more positive perceptions of NSW Government services among businesses in delivering seamless service across channels.

**Figure 39: Comparison of performance against NSW Government goals**

Customers are asked “Thinking about the services they provide overall (across any of the contact methods you have encountered), how would rate [a particular government service] in [jurisdiction] on the following?”



# Comparison of Proportion of Complaints Received Across Jurisdictions

Across jurisdictions, a higher proportion of complaints are received by UK Public services followed by NSW, QLD and VIC which are on par with a slightly lower proportion of complaints received.

Across jurisdictions, a higher proportion of complaints are received by UK Public services compared to other jurisdictions (29% of consumers and 32% of businesses have made a complaint to a UK Government service in the last 12 months). Refer to Figure 40 for further detail.

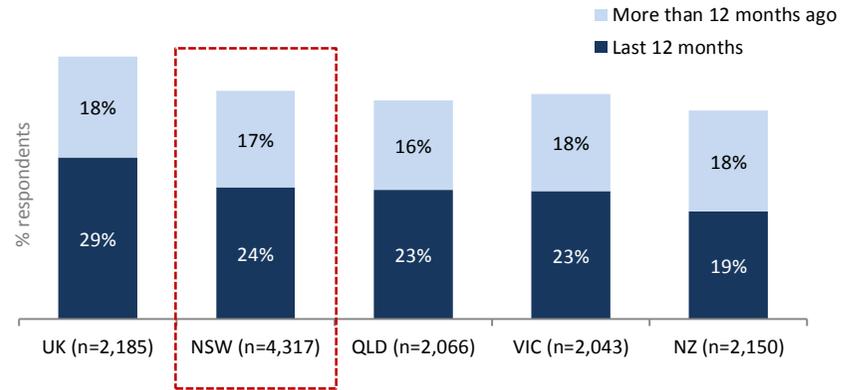
Compared to other Australian Eastern States, NSW is performing on par in the proportion of complaints received from consumers (24% of consumers have made a complaint to a NSW Government service in the last 12 months, compared to 23% in QLD and 23% in VIC).

Among businesses, NSW is performing on par with QLD and ahead of VIC in the proportion of complaints received from businesses (24% of businesses have made a complaint to a NSW Government service in the last 12 months, on par with 24% in QLD and ahead of 27% in VIC).

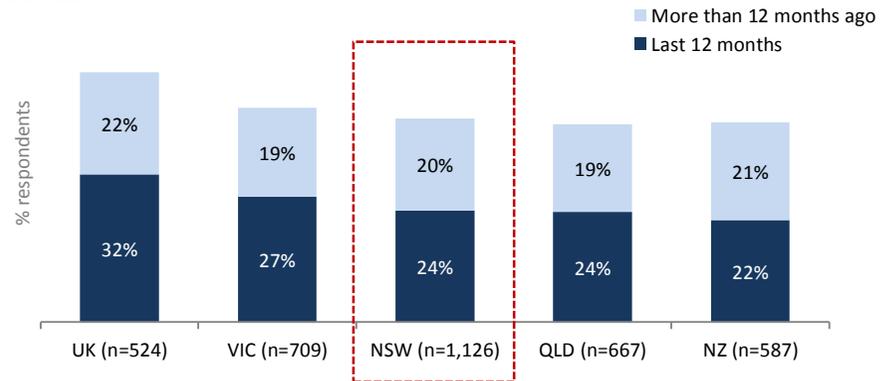
**Figure 40: Proportion of customers who made a complaint in the last 12 months by jurisdiction**

Customers are asked “When did you last complain to any [jurisdiction] Government Agency or Department?”

## Consumer



## Business



# Comparison of Performance in Complaints Management Across Jurisdictions

NSW performs on par with other jurisdictions in consumers perceptions of how well complaints are handled and is leading other jurisdictions in businesses perceptions.

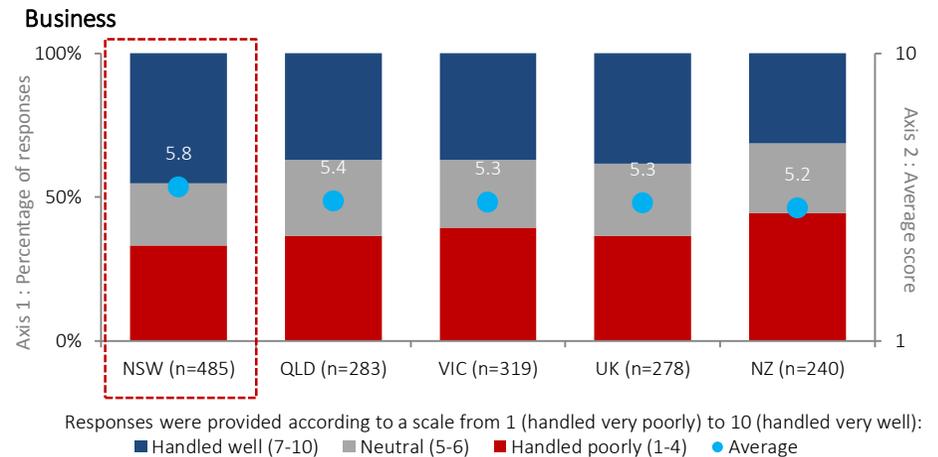
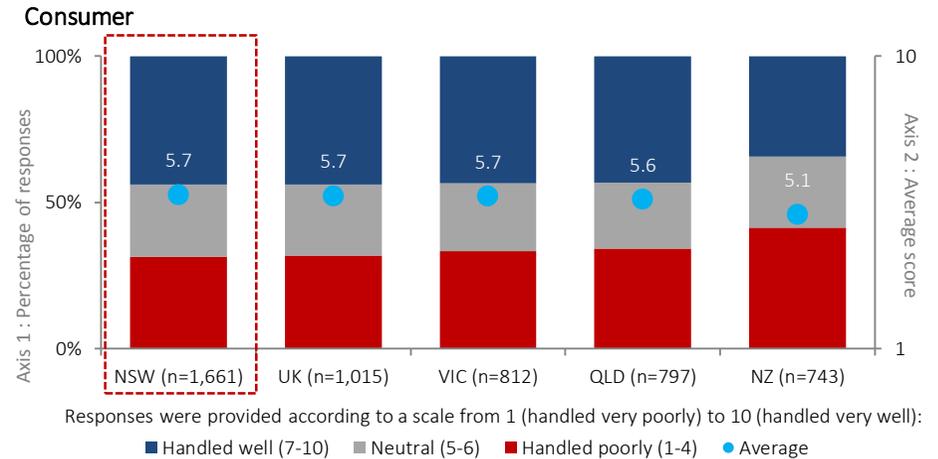
Customers across jurisdictions were asked to rate how well they perceive their most recent complaint to a government service was handled.

Results indicate that NSW is on par with the UK, VIC and QLD in consumer perceptions of complaints handling processes (average score of 5.7 in NSW compared to 5.7, 5.7 and 5.6 in UK, VIC and QLD respectively). NZ is behind all other jurisdictions in complaints handling processes (average consumer score of 5.1). Refer to Figure 41 for further detail.

Results indicate that NSW is leading other jurisdictions in complaints handling for businesses (average score of 5.8 in NSW compared to an average of 5.3 across other jurisdictions). Refer to red highlight in Figure 41). Consistent with findings from the consumer survey, complaints handling processes are perceived more negatively in NZ (average score of 5.2).

**Figure 41: Variation in complaints handling across jurisdictions**

Customers are asked "How well or poorly was your most recent complaint handled?"



# Comparison of Performance in Ease of Making a Complaint Across Jurisdictions

The UK leads across jurisdictions in perceptions of how easy it is to make a complaint for consumers, while NZ performs lowest. For businesses, there is little differentiation across jurisdictions.

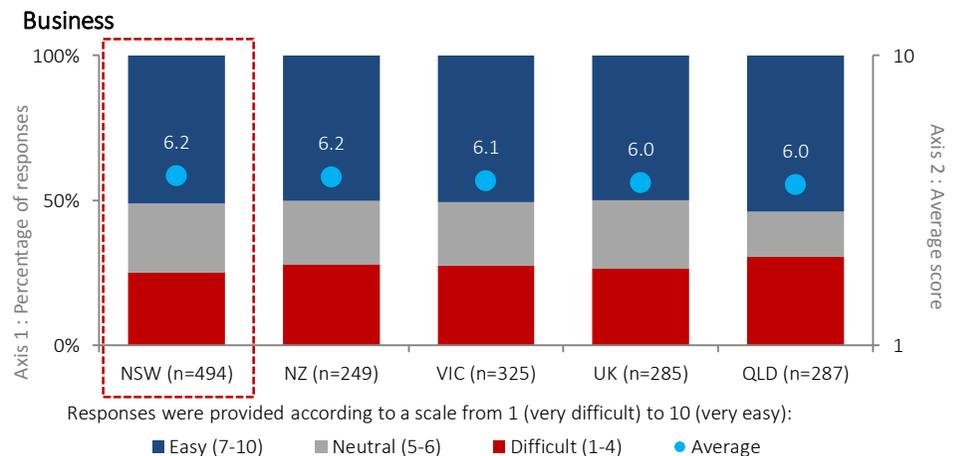
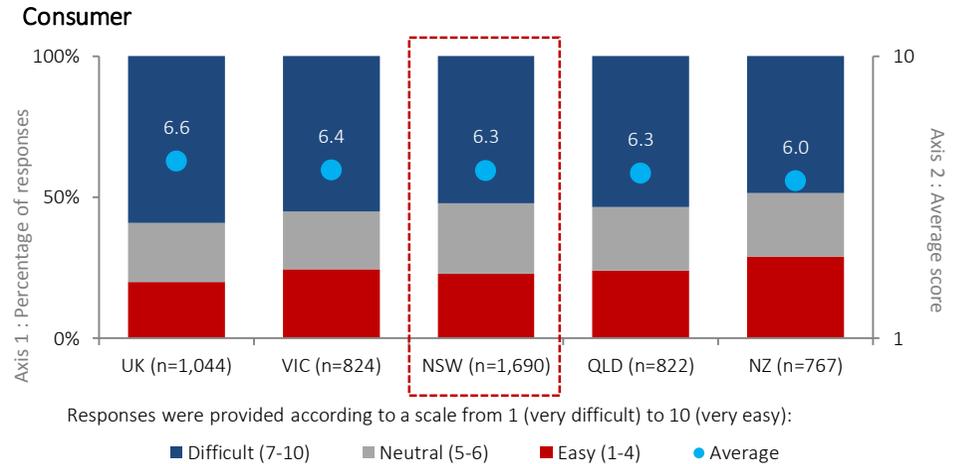
**Figure 42: Variation in ease of making a complaint across jurisdictions**

Customers are asked "How difficult or easy was it to make your complaint?"

Customers across jurisdictions were asked to rate how easy it was to make their most recent complaint to a government service.

Results indicate that NSW is on par with VIC and QLD in consumer perceptions of how easy it was to make a complaint (average score of 6.3 in NSW, VIC and QLD) while the UK is ahead of other jurisdictions (average score of 6.6) and NZ is behind all other jurisdictions (average score of 6.0). Refer to Figure 42 for further detail.

There is little differentiation between business perceptions of the ease of making a complaint to a government service across jurisdictions (average scores ranging from 6.0-6.2).



# Differences in Online Service Adoption Across Jurisdictions

More customers have gone online to interact with government services in NSW in the last 12 months than in other jurisdictions.

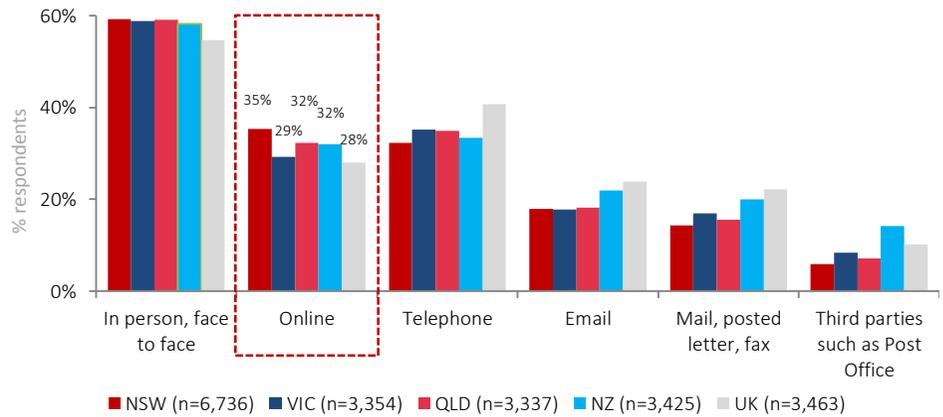
Customers across jurisdictions were asked the channels through which they have had direct dealings with government services in the last 12 months.

More customers have gone online to interact with government services in NSW in the last 12 months than in other jurisdictions (35% of consumers and 39% of businesses have gone online to carry out a direct dealing with a NSW Government service in the last 12 months compared to an average of 30% of consumers and 33% of businesses across other jurisdictions). Refer to Figure 43 for further detail.

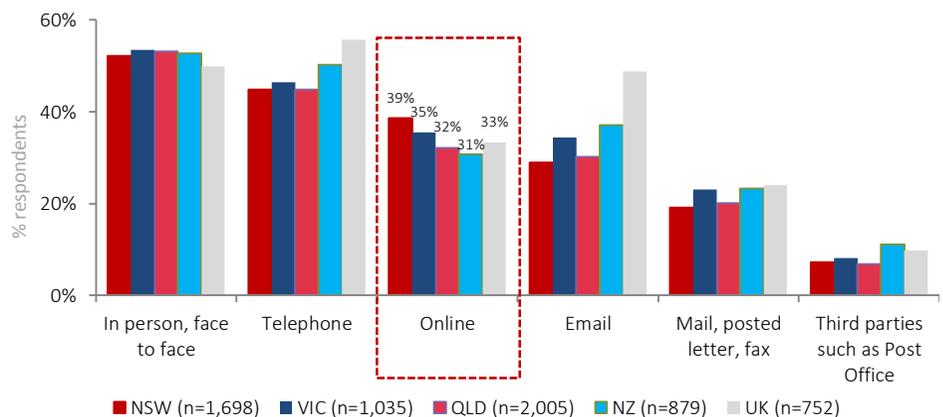
**Figure 43: Current contact methods used when dealing with government services**

Customers are asked "Which of the following contact methods have you used to carry out your direct dealings with the following services in [jurisdiction] in the last 12 months?"

## Consumer



## Business



# Differences in Channel Preference Across Jurisdictions

Online is a more preferred channel for interacting with government Services by customers in NSW, while email is more preferred by customers in the UK.

Customers across jurisdictions were asked their preferred channels for dealing with government services in the future.

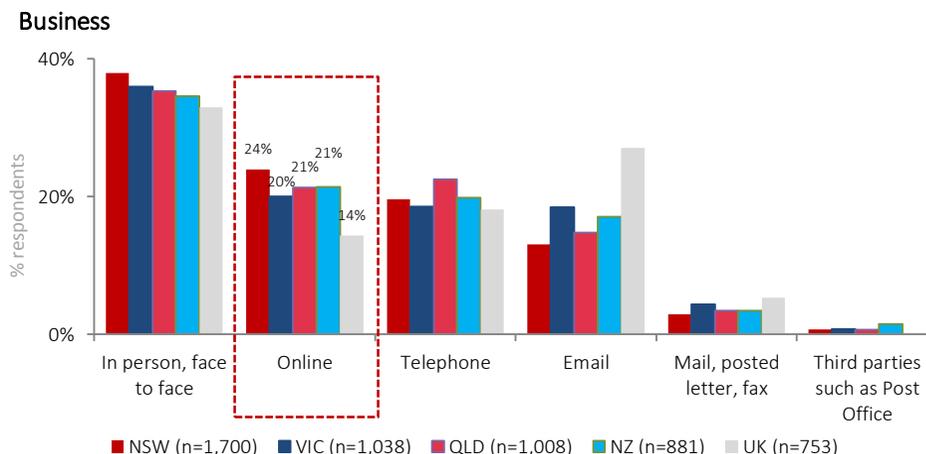
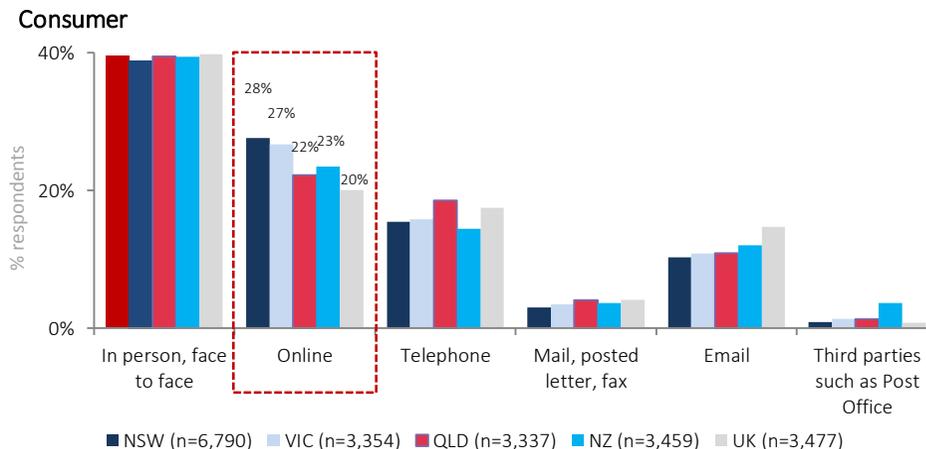
Results indicate that face-to-face is the most commonly preferred channel by consumers and businesses for interacting with government services across all jurisdictions.

Following this, online is the second most preferred channel for customers across jurisdictions and, in particular, is more preferred by customers in NSW for interacting with government services (Refer to figure 44).

Email is a more preferred channel for businesses than consumers and in particular, is more preferred by businesses in the UK (27% preferred, higher than online with 14% preferred).

**Figure 44: Preferred contact methods used when dealing with government services**

Customers are asked "Which of the following contact methods have you used to carry out your direct dealings with the following services in [jurisdiction] in the last 12 months?"



# Differences in Satisfaction with Online Services Across Jurisdictions

Satisfaction with online services experience is higher in the UK and QLD than other jurisdictions which presents opportunity for cross-jurisdiction learning.

Customers' overall satisfaction with online services is significantly higher in the UK and QLD compared to other jurisdictions (refer to Figure 45).

Among consumers, UK leads other jurisdictions in overall satisfaction with online services (average consumer score of 8.0 in the UK compared to 7.6, 7.4, 7.5 and 7.6 in NSW, VIC, QLD and NZ respectively).

Among businesses, the UK and QLD lead other jurisdictions in overall satisfaction with online services (average score of 7.7 in the UK and QLD compared to 7.4, 7.3, and 7.3 in NSW, VIC and NZ respectively).

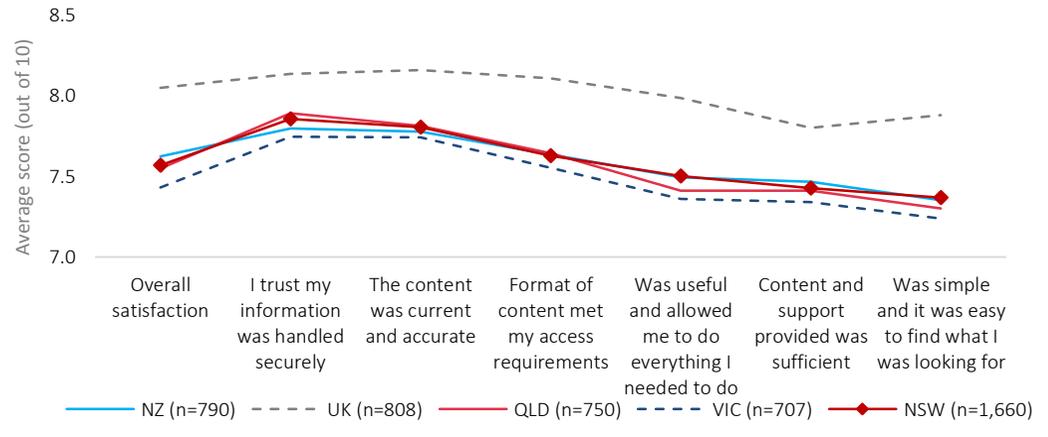
Higher average customer satisfaction with online services in the UK is driven by high satisfaction with the currency and accuracy of content, usability (i.e. the website was useful and allowed me to do everything I needed to do) and security of information (i.e. I trust my information was handled securely).

These results suggest NSW has an opportunity to learn from the UK in looking to improve their online experiences.

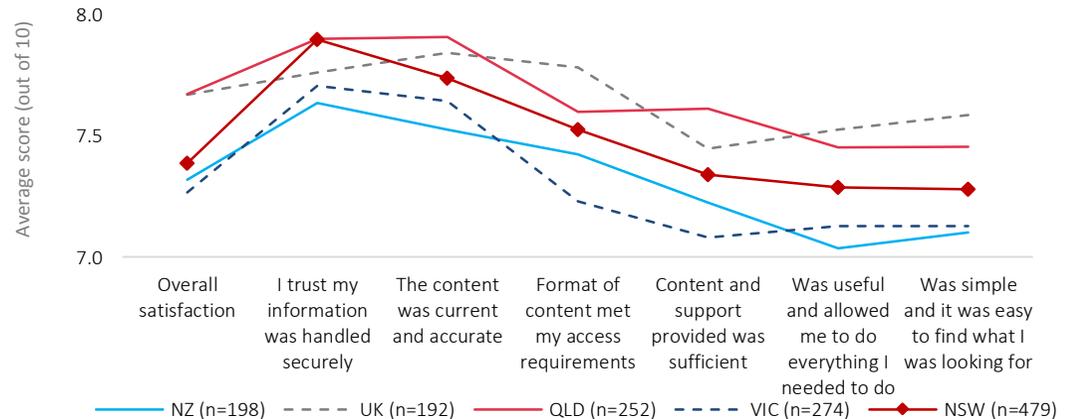
**Figure 45: Satisfaction with attributes of Online Services**

Customers were asked "Thinking about your experiences interacting with [jurisdiction] services online in the last 12 months, to what extent do you agree or disagree with each of the following statements?" according to a scale from 1 (strongly disagree) to 10 (strongly agree)

## Consumer



## Business





Customer Service Commissioner  
NEW SOUTH WALES

