



Customer Service Commissioner
NEW SOUTH WALES

NSW Whole of Government Customer Satisfaction Measurement Survey

2016 Detailed Report

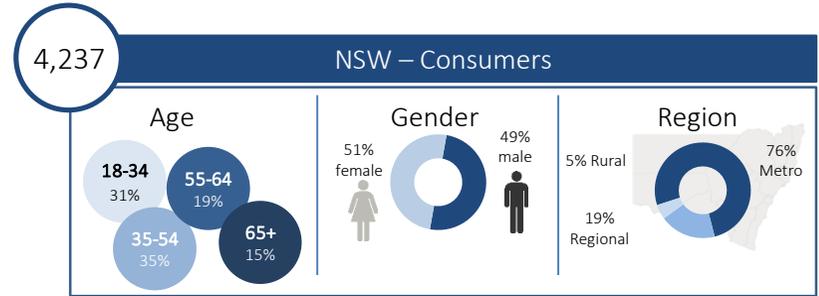
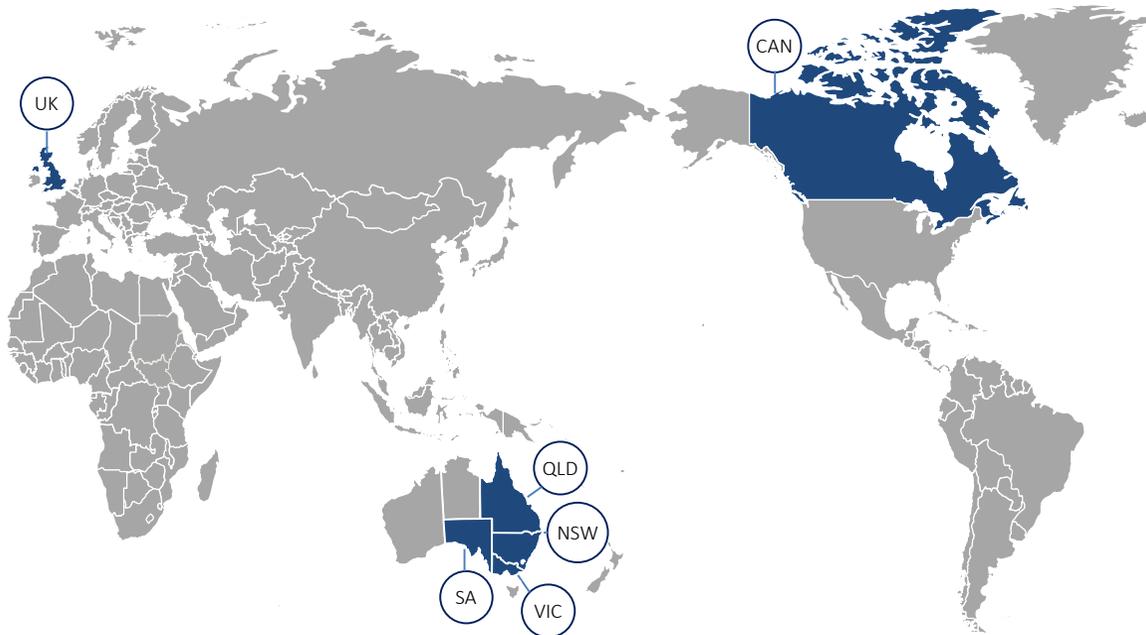
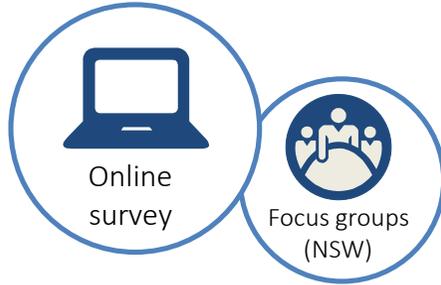
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Note : The insights from the Business respondents are shown selectively where the results differ significantly from the consumer insights

Executive Summary

We surveyed 14,000+ consumers and 3,500+ businesses across six jurisdictions...



Other jurisdictions - Consumers

Queensland	Victoria	South Australia	United Kingdom	Canada
2,025	2,061	2,041	2,039	2,076

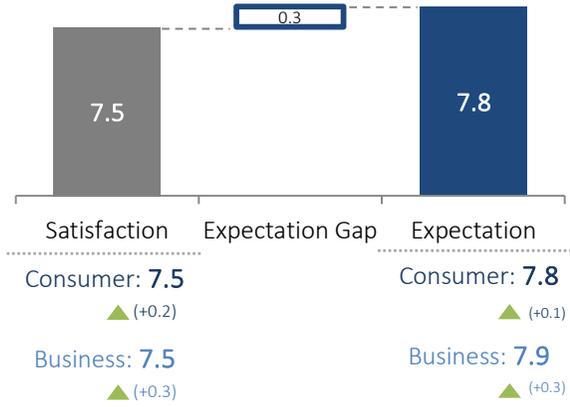
Other jurisdictions - Businesses

Queensland	Victoria	South Australia	United Kingdom	Canada
502	509	525	516	509

What did customers say about NSW Government services...

Performance of NSW Government services against baseline measures

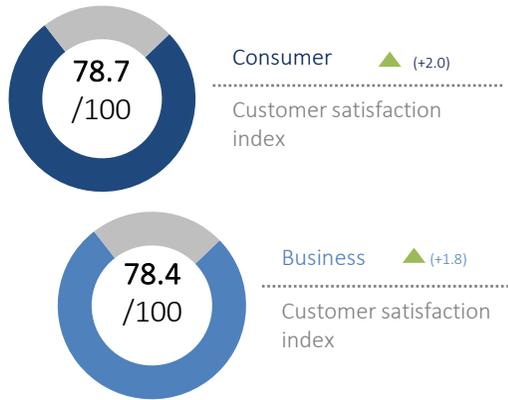
There continues to be positive perceptions of NSW Government services, with customer satisfaction and expectations increasing significantly from 2015 to 2016. However, satisfaction is still slightly below expectations.



Category	Satisfaction	Expectation Gap	Expectation
Consumer	7.5 (+0.2)	0.3	7.8 (+0.1)
Business	7.5 (+0.3)		7.9 (+0.3)

Customer Satisfaction Index results

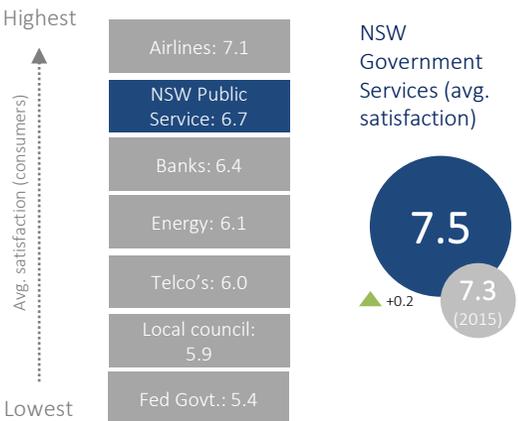
The NSW Customer Satisfaction Index increased for both consumers and businesses from 2015 to 2016. Customers' perceptions of how NSW Government services compare to an ideal service has also significantly increased from 2015 to 2016.



Category	2016 Index	2015 Index	Change
Consumer	78.7 / 100	76.7	+2.0
Business	78.4 / 100	76.6	+1.8

Perceptions of the NSW Public Sector 'brand'

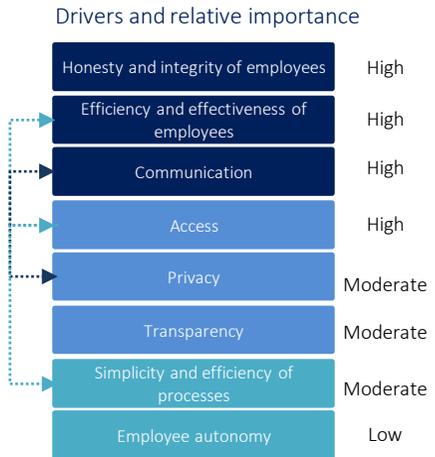
Customers' perceptions of the NSW 'brand' has significantly improved from 2015 to 2016, ranking between airlines and banks. However, satisfaction with the NSW Public Service 'brand' still remains lower than the NSW Government Services overall.



Brand	Avg. Satisfaction
Airlines	7.1
NSW Public Service	6.7
Banks	6.4
Energy	6.1
Telco's	6.0
Local council	5.9
Fed Govt.	5.4
NSW Government Services (avg. satisfaction)	7.5 (+0.2)
NSW Government Services (2015)	7.3

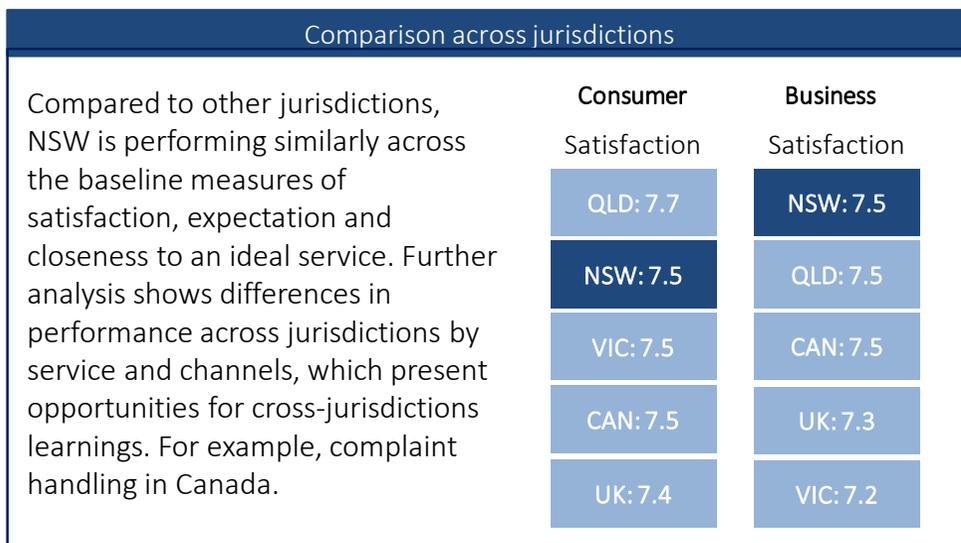
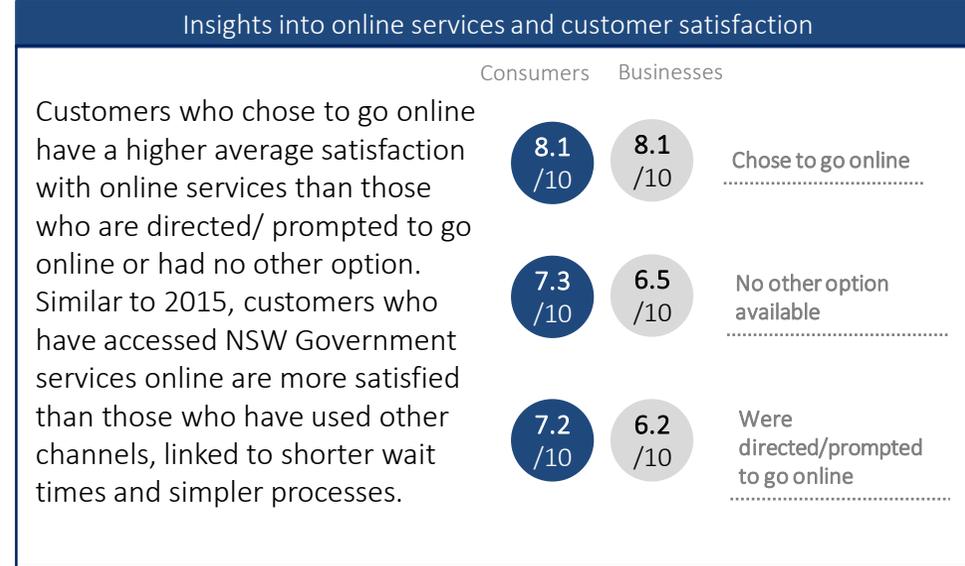
Drivers of satisfaction

Eight drivers of customer satisfaction have been identified consistent with 2015. Efficiency and effectiveness of employees and access to information (related to simplicity and efficiency of processes) are identified as primary opportunity areas to drive increases in whole-of-government satisfaction.



Driver	Relative Importance
Honesty and integrity of employees	High
Efficiency and effectiveness of employees	High
Communication	High
Access	High
Privacy	Moderate
Transparency	Moderate
Simplicity and efficiency of processes	Moderate
Employee autonomy	Low

What did customers say about NSW Government services...



These insights suggest areas we need to focus on to get the biggest improvements in whole-of-government satisfaction with NSW Government services...

- Continue to improve the **complaints handling** experience
- Improve the effectiveness and efficiency of **employees**
- Improve the simplicity and effectiveness of **processes** and access to **information**
- Continue to focus on **digital** access and useability to improve satisfaction with online services

Background and Approach



Background

The Annual Customer Satisfaction Measurement Survey has been developed to support a continued focus on improving satisfaction with Government services.

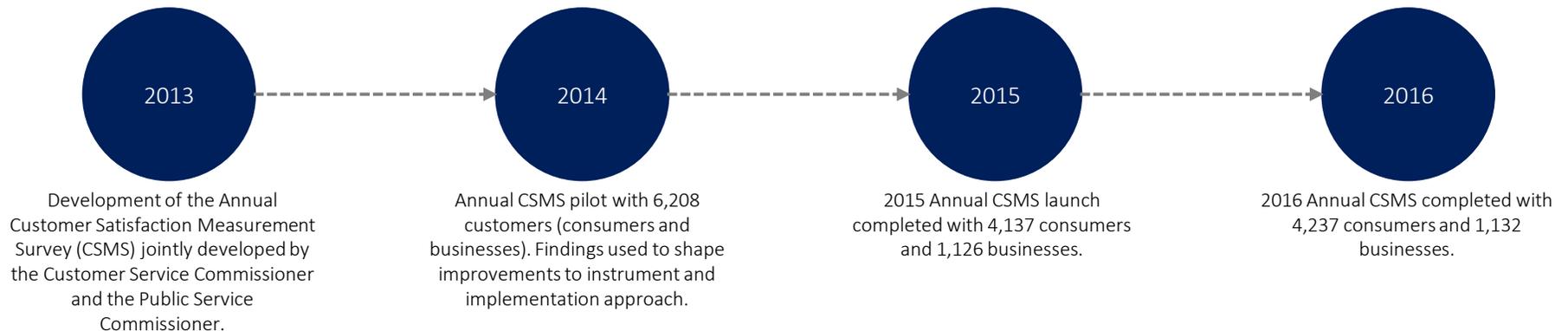
Improving customer satisfaction with key government services is one of the 12 Premier's Priorities.

The Annual 'Customer Satisfaction Measurement Survey' provides a whole-of-government approach to measuring customer satisfaction to support a continued focus on improving customer service. 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 of the pilot were reviewed and the survey is implemented annually (in 2015 and 2016), with the outputs used to measure progress against the Premier's Priority 12 – 'improve customer satisfaction with key government services every year, this term of government'.

The results of the Annual CSMS are also used to complement existing Agency level research programmes and provides important information for Agencies to continue shaping and refining their strategies.

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





Objectives

The Annual Customer Satisfaction Measurement Survey has been developed to provide a holistic view of customer service, including baseline scores for whole-of-government customer satisfaction from which to gauge future success of citizen centric reforms.

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 (including changes in results from 2015 to 2016)
- How NSW Government services are performing against important attributes of the customer experience relating to employees, values, processes and goals
- The key drivers of satisfaction for satisfied and dissatisfied customers at a whole-of-government level, and how these vary by individual services
- A holistic understanding of the quality of service delivered by NSW Government services through the Customer Satisfaction Index (interpreted in the context of the Premier's Priority 12).

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, 7-10.

Arrows are used throughout the document to signify statistically significant changes from 2015 to 2016 or year on year trends as specified in each legend.

Structure of the 2016 Annual Customer Satisfaction Measurement Survey

Survey Sections	Sample Questions
Profile and use of government services	<ul style="list-style-type: none"> • Age, gender, region where you live/work • Business location, type, size, position in business, industry type • Which government services have you ever had direct dealings with in the last 12 months? • Nature and frequency of direct dealings for individual services
Usage and satisfaction with digital services	<ul style="list-style-type: none"> • Which contact methods were used when carrying out direct dealings with services? • If chose to go online or not • Which device was used to access online service? How satisfied were you with elements of the experience? • What are the reasons for not using online service? • What is your preferred contact method for carrying out direct dealings in the future?
Measures to assess overall service quality	<ul style="list-style-type: none"> • How would you rate your expectation of overall quality of service? • How satisfied would you say you are with each of the following services in NSW? • Please imagine an ideal service. How well do you think each service in NSW compares with that ideal service?
Perceptions of services	<ul style="list-style-type: none"> • Thinking now about its employees, to what extent do you agree or disagree that the following statements describes the service? • And now thinking about its processes, to what extent do you agree or disagree that the following statements describes the service? • Thinking about the services they provide overall, how would you rate the service on the following (goals)? • Thinking about the values that they uphold, to what extent would you agree with the following statements when thinking about the service?
Perceptions of public service overall	<ul style="list-style-type: none"> • Which of the following would you use to describe the Public Service overall? (List of positive and negative attributes) • 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)
Complaints experiences	<ul style="list-style-type: none"> • When did you last complain about a service? • Which service did you complain to? • How well or poorly was your most recent complaint handled? • How difficult or easy was it to make your complaint?



Research Scope and Approach

The Customer Satisfaction Measurement Survey captures customer feedback on twenty-two 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-two 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, Skills and Regional Development

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

Justice

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

Family & Community Services

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

Transport

- Public Transport
- Car and Boat Registration
- Major Roads

Education & Training

- Public Schools

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 online surveys were undertaken with customers in New South Wales, Victoria, Queensland, South Australia, the United Kingdom and Canada to enable comparative cross-jurisdictional analysis.

The surveys were 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. Sample sizes for the total number of consumers and businesses surveyed by jurisdiction are shown below.

All surveys were completed over a consistent time period from 16 May 2016 to 3 June 2016 and results are therefore reflective of experiences with services across jurisdictions over the 12 months prior, from May 2015 – May 2016.

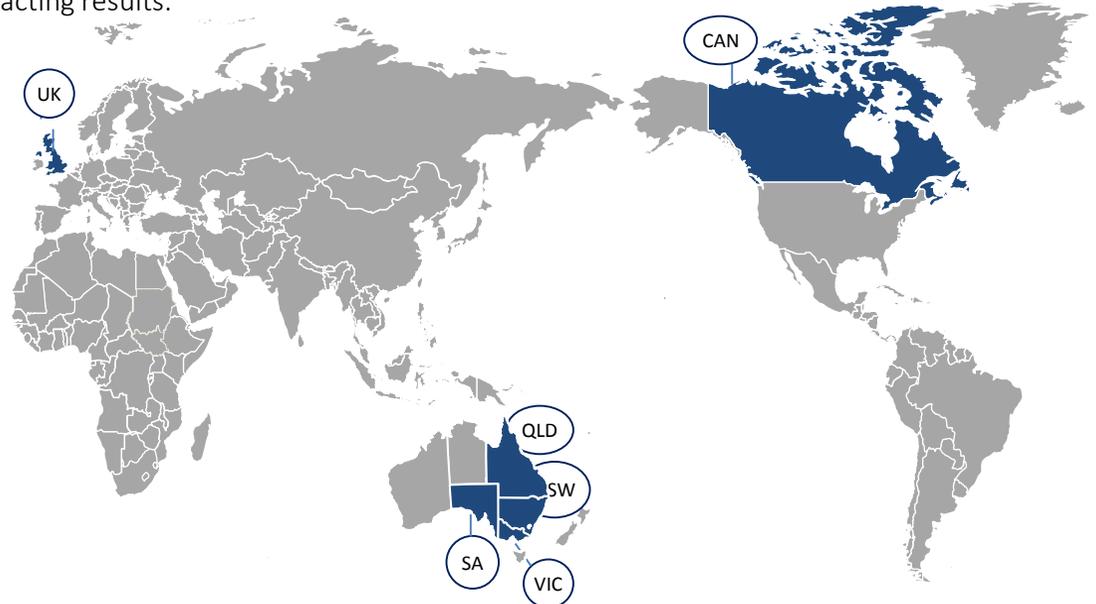
The purpose of undertaking identical surveys across jurisdictions was to apply a consistent methodology for measuring the quality of services delivered by governments to enable comparative cross-jurisdictional analysis.

When comparing scores across jurisdictions, it is important to take into account that there are differences in government structures and compositions across jurisdictions, impacting accountability and responsibility of services, and expectations of government services and the types of customers who interact with services may vary significantly by jurisdiction, impacting results.

2016 Survey Sample Size

Jurisdictions	Consumer (n=)	Business (n=)	Total (n=)
New South Wales	4,237	1,132	5,369
Queensland	2,025	502	2,527
Victoria	2,061	509	2,570
South Australia*	2,041	525	2,566
United Kingdom	2,039	516	2,555
Canada	2,076	509	2,585

*South Australia was not included in the 2015 study.

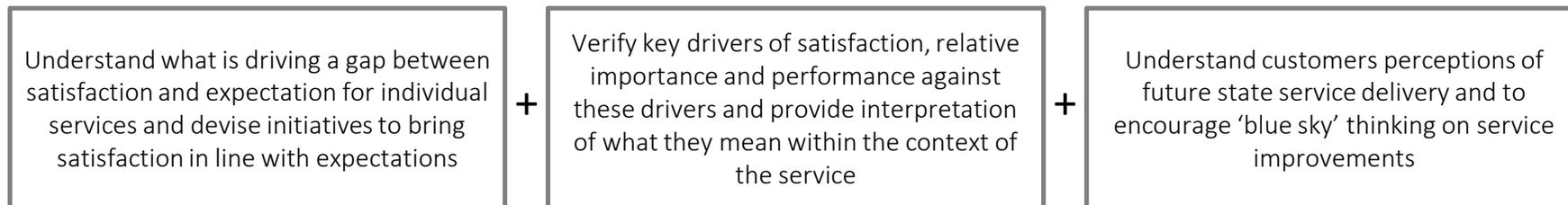




Qualitative Research

Qualitative research was also undertaken with customers in NSW to complement the online survey, providing additional context around insights.

Qualitative Research Objectives



Scope and Approach

Qualitative research focused on services for which performance was identified to be lower to support the development of initiatives that will lead to the greatest improvements in satisfaction. In line with this, six focus groups were held for a cross-section of services across regions:

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

		Services					
		Major Roads	Consumer Affairs	Water Supply	Planning and Environment	Business Services	Education
Region	Mix of gender and experiences interacting with services						
	Sydney (CBD)		1 x group	1 x group		1 x group	1 x group
	Western Sydney (Parramatta)				1 x group		
	Wollongong	1 x group					

Key Findings in 2016



Summary of Key Findings in 2016

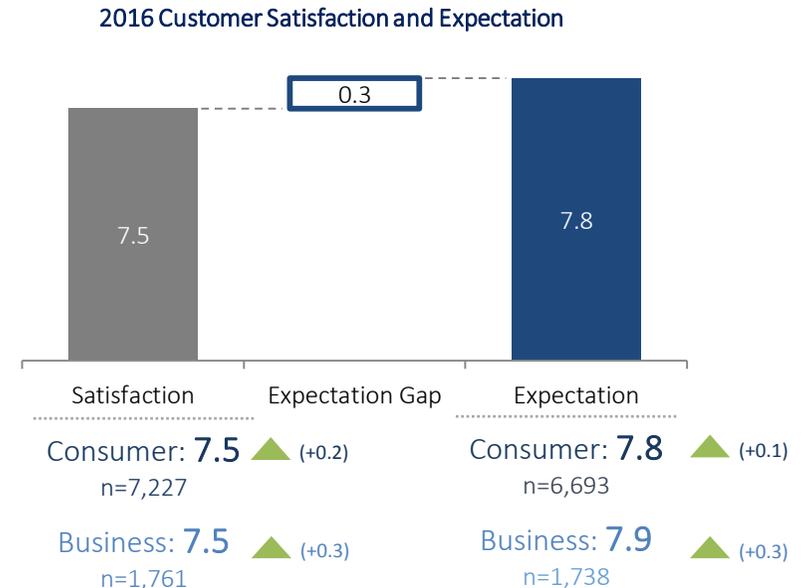
Theme	Key Findings
Overall Performance	<ul style="list-style-type: none"> • Key Finding 1: There has been a statistically significant increase in customers' average satisfaction and expectation since 2015 • Key Finding 2: There has been a significant increase in the Customer Satisfaction Index and customer perceptions of comparison to an ideal service from 2015 to 2016 • Key Finding 3: Satisfaction with NSW Government Services continues to vary by demographics. • Key Finding 4: Gap to expectations varies by demographics with the gap decreasing with age amongst consumers, and smallest for those employed by businesses of more than 200 employees • Key Finding 5: Customer perception of the NSW Public Service overall has improved significantly from 2015, placing behind Airlines for 'brand' perception
Performance Against Customer Satisfaction Drivers	<ul style="list-style-type: none"> • Key Finding 6: Whilst the drivers of customer satisfaction are consistent to 2015, the order of priority varies slightly in 2016 • Key Finding 7: Primary opportunity areas are consistent to 2015 with efficiency and effectiveness of employees, and access to information identified as opportunities to drive increases in satisfaction • Key Finding 8: Satisfaction drivers continue to vary across services implying a need for targeted service actions to support whole-of-government outcomes
Complaints Handling	<ul style="list-style-type: none"> • Key Finding 9: Customers' who have had their complaints handled well continue to have above average satisfaction.
Perceptions of Online Services	<ul style="list-style-type: none"> • Key Finding 10: Customers' needs for improved access, simplicity and efficiency in processes can be enhanced through online services which are delivering positive experiences • Key Finding 11: Consumers were more satisfied with the overall online experience with NSW Services compared to 2015, whilst satisfaction with online services among businesses remain largely flat • Key Finding 12: Customers who exercise a choice to go online have a higher average satisfaction with online services than those who were directed/prompted or have no choice • Key Finding 13: A majority of customers use laptop computers to access online content, and satisfaction is highest for consumers using a tablet and businesses using a laptop • Key Finding 14: Improvements to navigation, data security and accessibility are most likely to increase usage of online services by customers
Variation in Service Contact Method Across Services	<ul style="list-style-type: none"> • Key Finding 15:: Face to face remains the most commonly used and preferred contact method to interact with NSW Government services for customers
Comparison of Performance to Other Jurisdictions	<ul style="list-style-type: none"> • Key Finding 16:: Consumer satisfaction and expectation of NSW Government Services are the second highest compared to other jurisdictions, just behind QLD • Key Finding 17: All jurisdictions have seen a positive shift across the overall measures of customer satisfaction, expectation and comparison to ideal service since 2015.

Key Finding 1: There has been a statistically significant increase in customers' average satisfaction and expectation since 2015

There continues to be positive perceptions of NSW Government services overall, with an average satisfaction of 7.5 out of 10 for both consumers and businesses.

However, satisfaction is slightly below customers' expectations (7.8 out of 10 for consumers; 7.9 out of 10 for businesses).

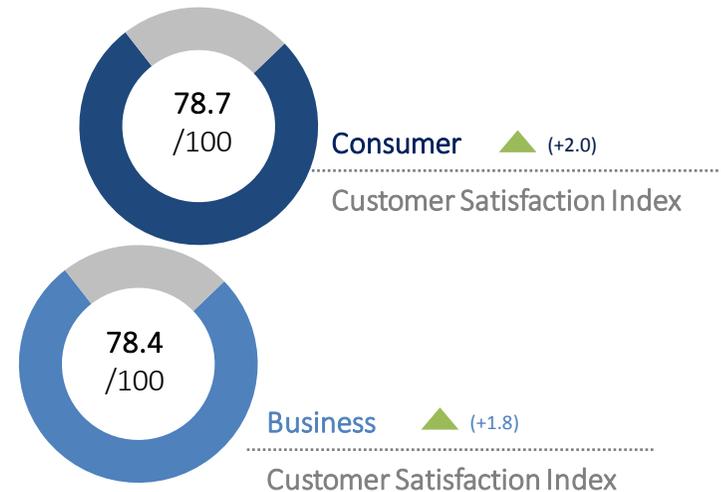
Average satisfaction and customer expectations have experienced statistically significant increases for both consumers and businesses since 2015.



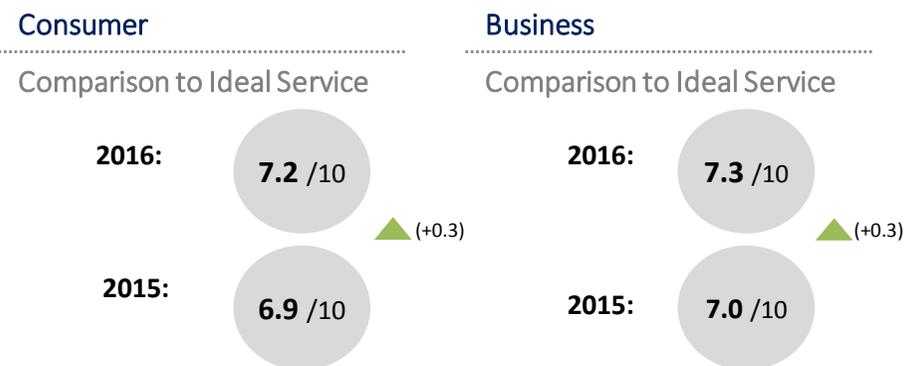
Key Finding 2: There has been a significant increase in the Customer Satisfaction Index and customer perceptions of comparison to an ideal service from 2015 to 2016

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 (1) how satisfied customers are, (2) how close their experience is to the expectations of that services and (3) how close their experience is to an ideal service.

The NSW Customer Satisfaction Index score is 78.7 out of 100 for consumers and 78.4 out of 100 for businesses in 2016. Both scores represent a statistically significant increase from 2015.



Perceptions of how businesses and consumers think each service in NSW compares to an 'ideal service' have significantly improved from 2015 to 2016. In particular, 5% more consumers, and 4% more businesses (compared with 2015) found the service on offer close to an ideal service.



Legend:

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Key Finding 3: Satisfaction with NSW Government services continues to vary by demographics

Consistent with 2015, more positive perceptions of NSW Government services tend to be held by older consumers and consumers living in regional areas. Although students tend to have more negative perceptions of NSW Government services, there has been a statistically significant increase in students' satisfaction since 2015 (+0.4).



Consistent with 2015, businesses located in rural areas are more satisfied with NSW Government services. In 2016, satisfaction amongst businesses with more than 200 employees has significantly increased (+0.6).

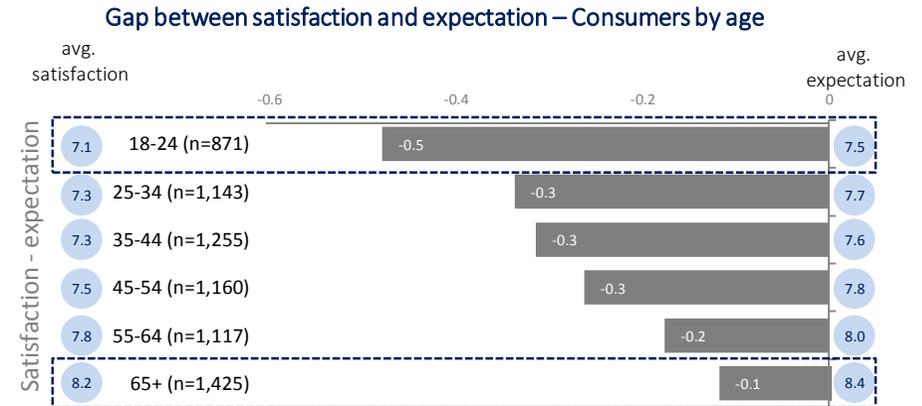


Legend:

-  Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
-  No significant change in avg. from 2015 (at 99% level of Confidence)
-  Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

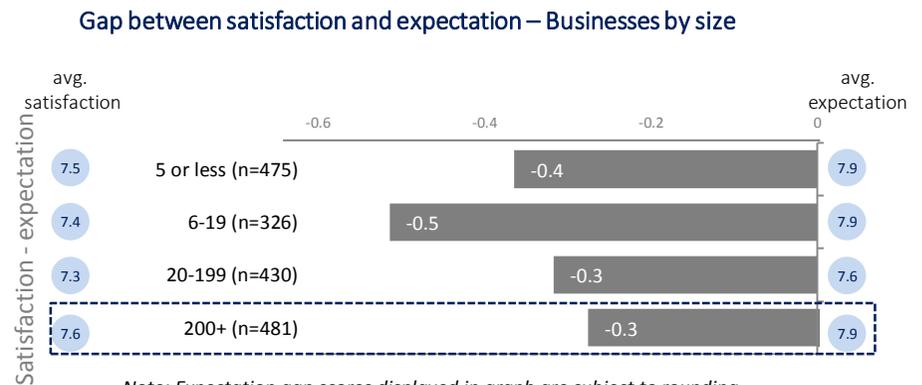
Key Finding 4: Gap to expectations varies by demographic with the gap decreasing with age amongst consumers, and smallest for businesses of more than 200 employees

Consumers aged 65+ have the highest average expectation of NSW Government services, their high average satisfaction produces a smaller gap between satisfaction and expectation (-0.1). This compares with consumers aged 18-24, who have the largest expectation gap (-0.5).



Note: Expectation gap scores displayed in graph are subject to rounding

Consistent with a higher average overall satisfaction with NSW Government services, businesses with more than 200 employees have the smallest gap between satisfaction and expectation (-0.3). The gap is largest for those businesses with 6-19 employees (-0.5).

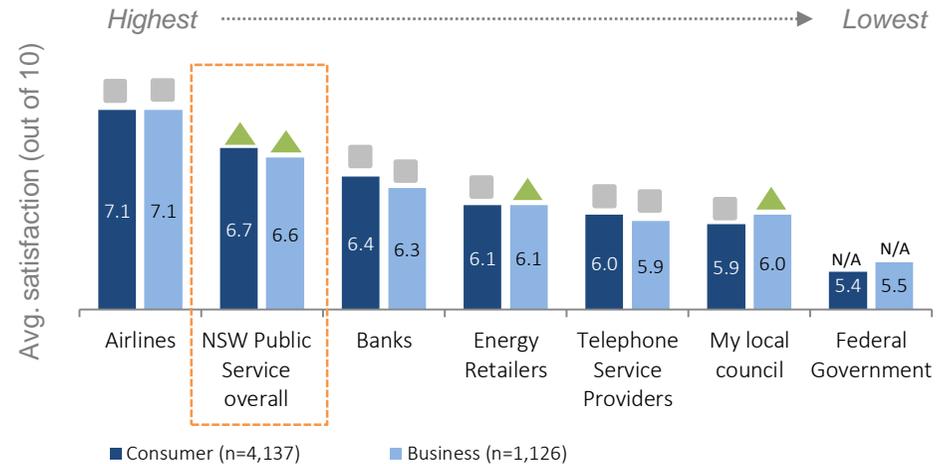


Note: Expectation gap scores displayed in graph are subject to rounding

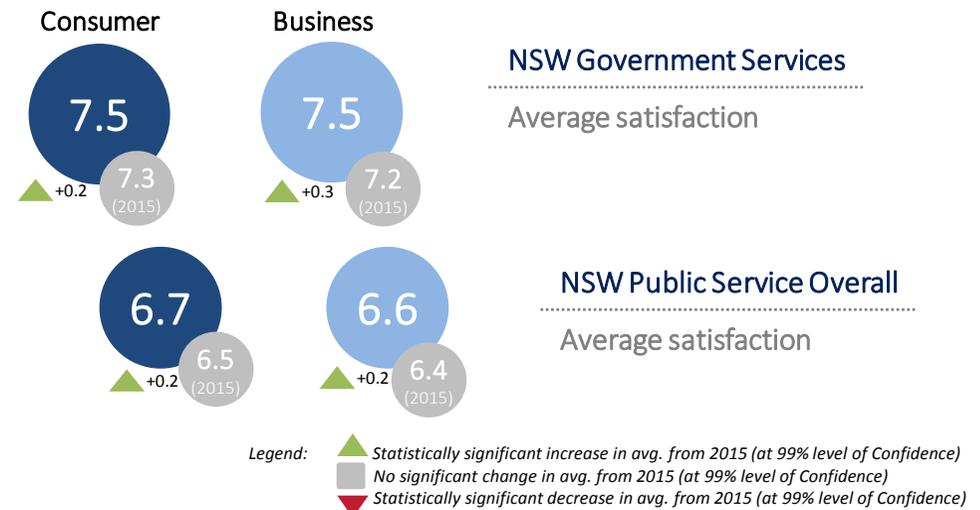
Key Finding 5: Customer perception of the NSW Public Service overall has improved significantly from 2015, placing behind Airlines for brand perception

Customer satisfaction with the NSW Public Service overall has significantly increased by 0.2 from 2015 to 2016. For consumers, it was the only brand to see a significant increase, and for businesses, the NSW Public Service overall has significantly increased alongside energy retailers and Local Councils.

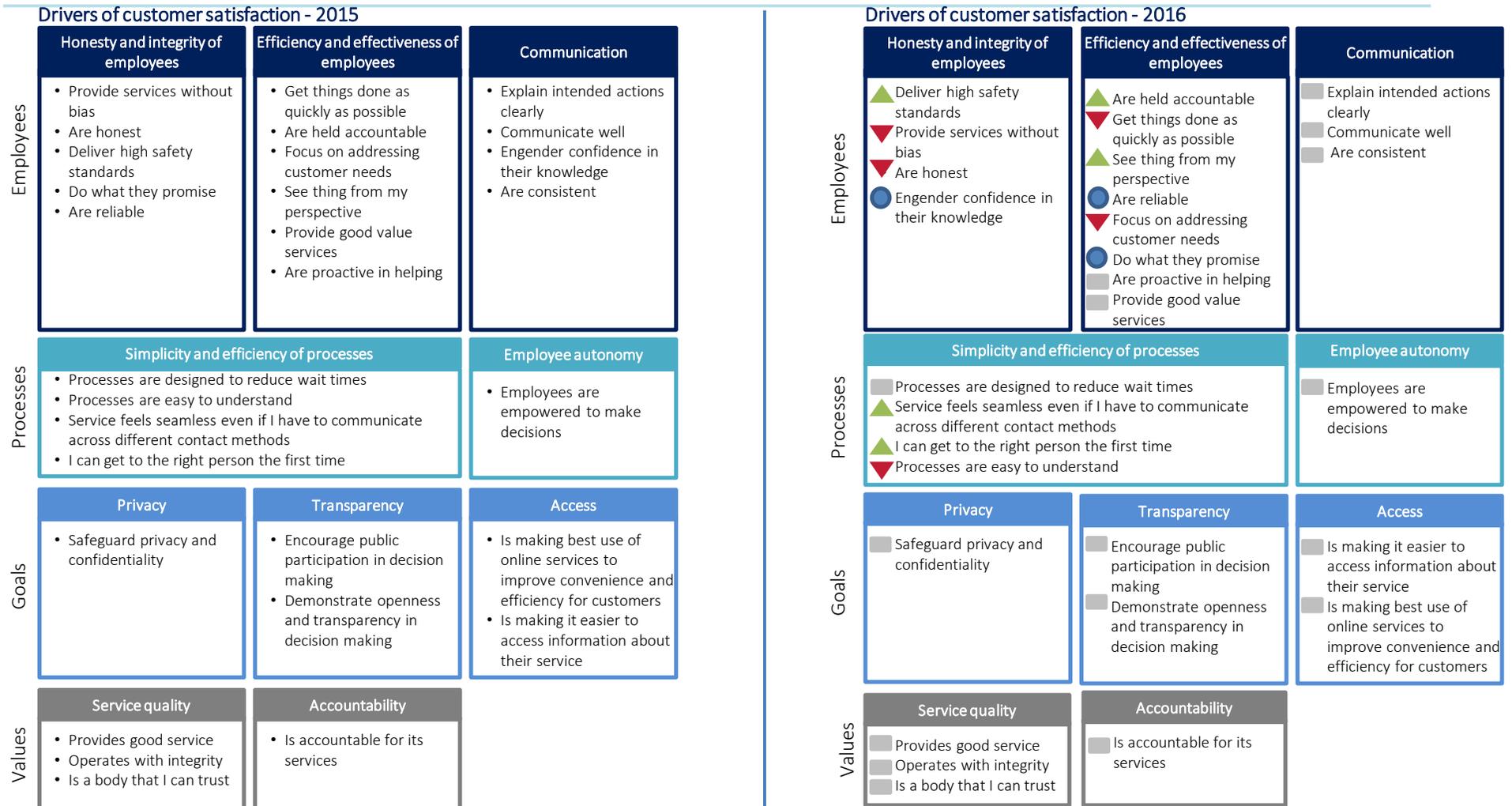
The gap between brand perceptions of airlines and the NSW Public Service overall has reduced from 2015.



Consistent with 2015, satisfaction with the NSW Public Service overall is significantly less than with NSW Government services overall; highlighting a disconnect between customers' experience of service delivery versus perception of the public service.



Key Finding 6: Whilst the drivers of customer satisfaction are consistent to 2015, the order of priority varies slightly in 2016



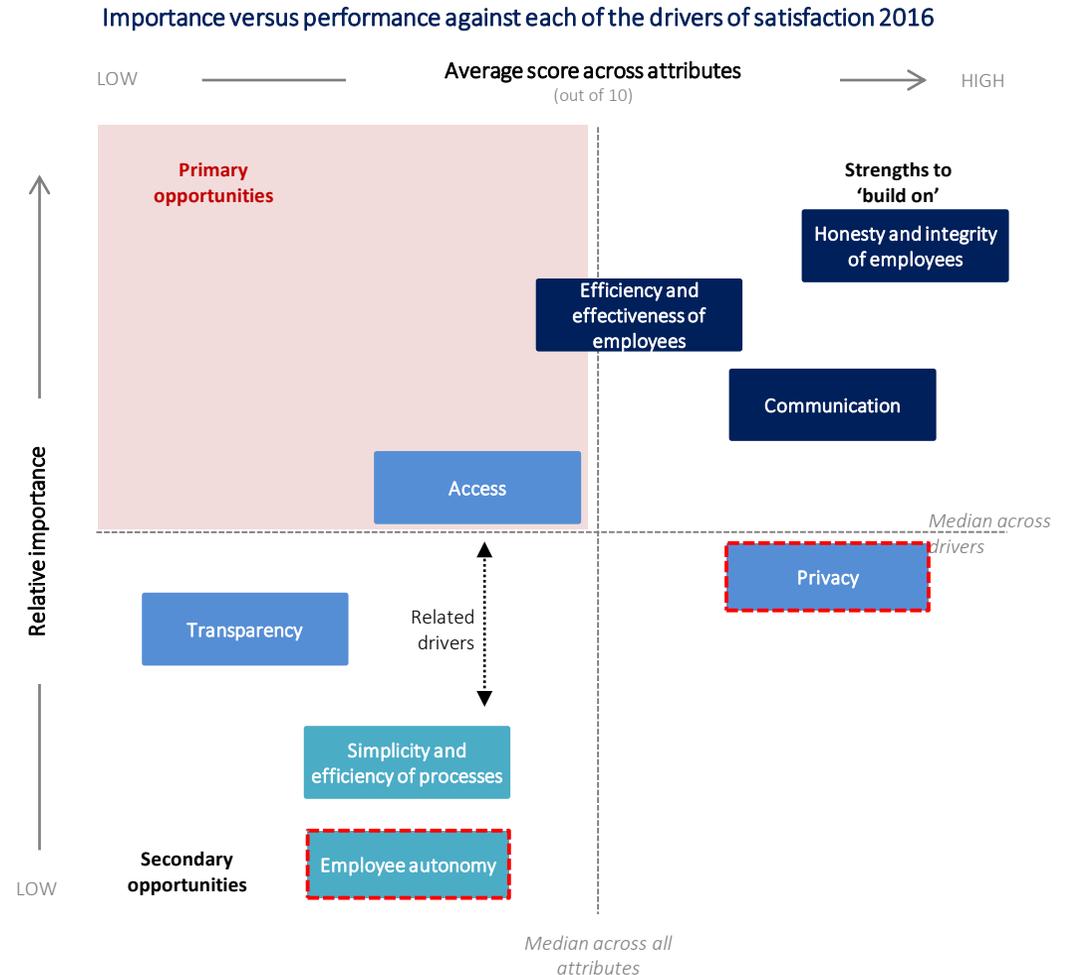
Legend: ▲ Increase in ranking within the same group since 2015 (based on factor loading)
 ■ No change in ranking
 ▼ Decrease in ranking within the same group since 2015 ((based on factor loading)
 ● Aligned to a new group in 2016

Employee attributes Goals Processes

Key Finding 7: Primary opportunity areas are consistent to 2015 with efficiency and effectiveness of employees, and access identified as opportunities to drive increases in whole-of-government satisfaction

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

- Efficiency and effectiveness of employees as well as access to information and online services are primary opportunity drivers for increasing whole-of-government 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 is lower and satisfaction with this driver is strongly related to efficiency and effectiveness of employees, and access.



Note: Analysis displayed is based on customer data however similar results are observed for businesses.

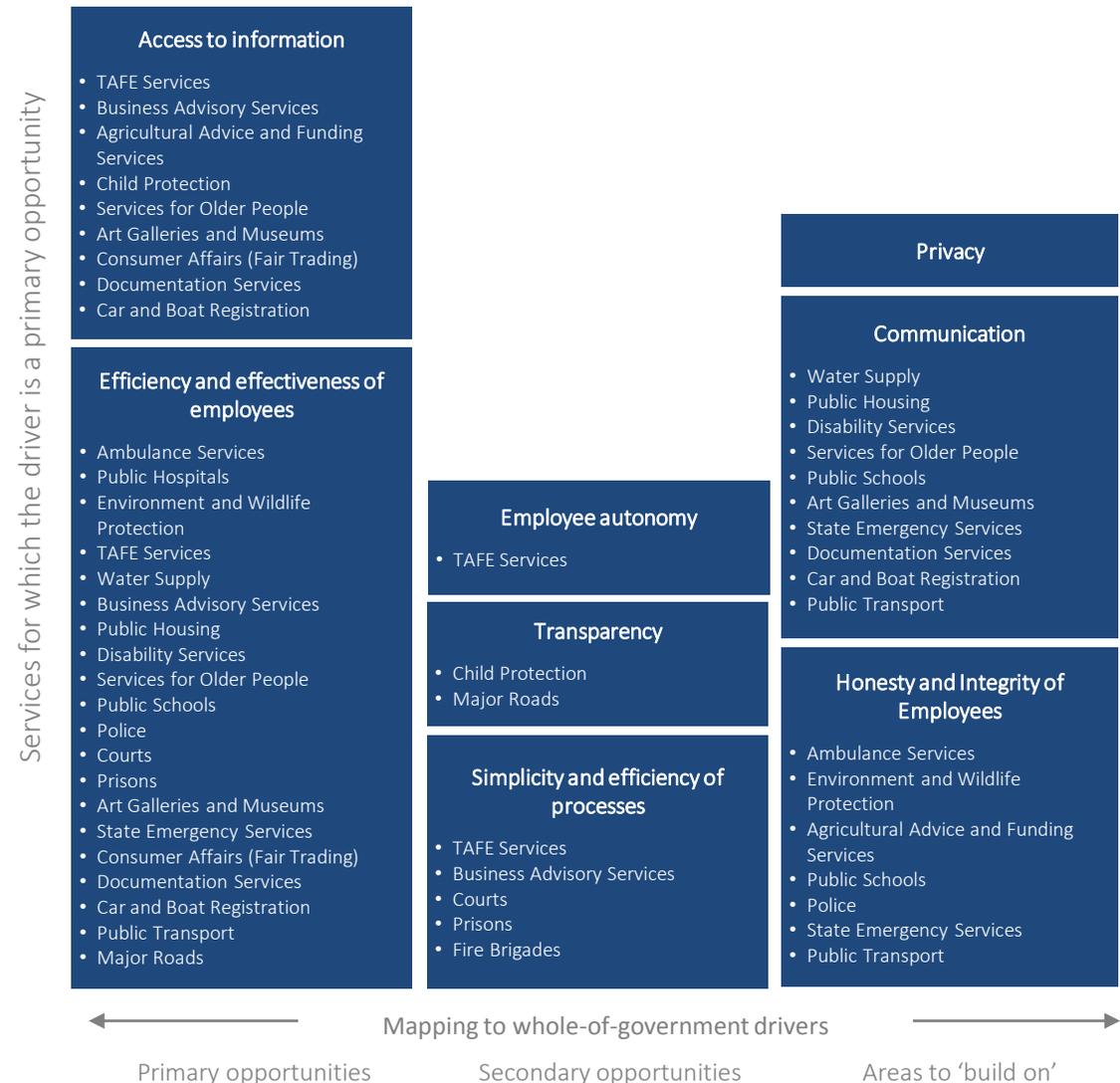
¹Note: Calculation is based on the relativity of parameters in the statistical analysis of drivers against satisfaction.

Key Finding 8: Satisfaction drivers continue to vary 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 continued need for targeted service priorities to support whole-of-government outcomes.

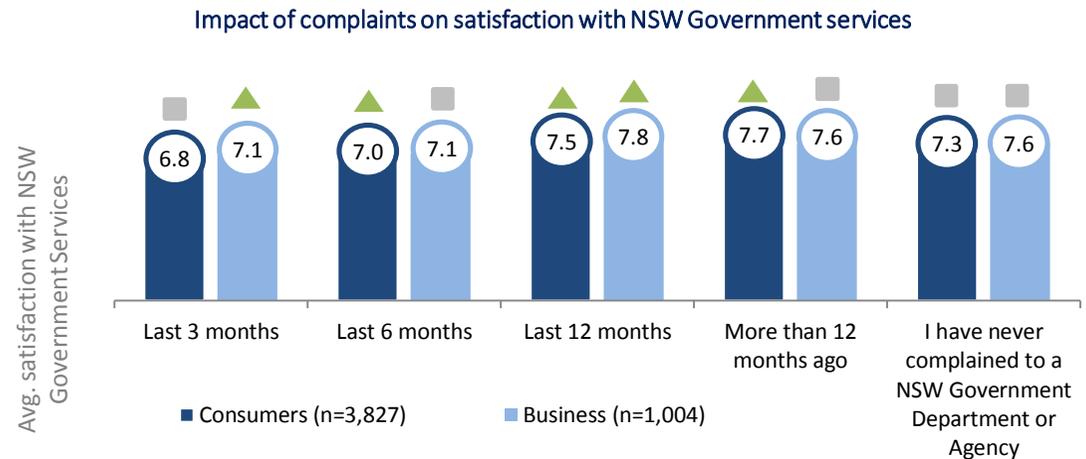
Individual service analysis has been undertaken to highlight differing priority areas for each cluster.

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 a number of services including Water Supply, Public Housing and Disability Services.



Key Finding 9: Customers' who have had their complaints handled well continue to have above average satisfaction

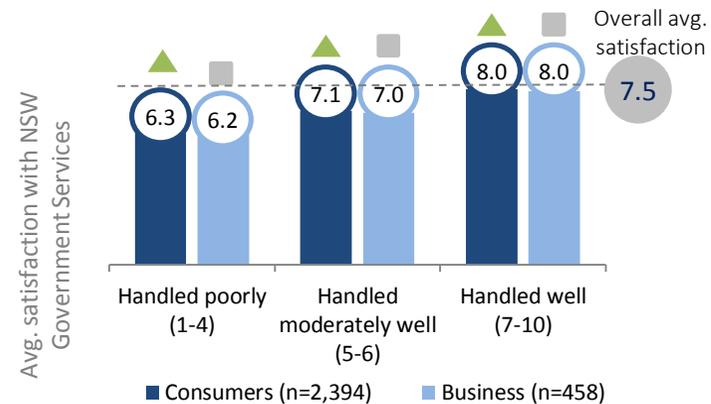
Customers who complained most recently (within the last 3 months) have a lower average satisfaction with NSW Government services overall.



For consumers, average satisfaction with NSW Government services from 2015 to 2016 has significantly increased across all complaint handling aggregate scores (handled well, moderately well and poorly). Whilst business has also seen an increase, it is not significant.

Customers who had their complaints handled well continue to have higher than average satisfaction with NSW Government services.

Impact of complaints handling on satisfaction with NSW Government services



Legend:

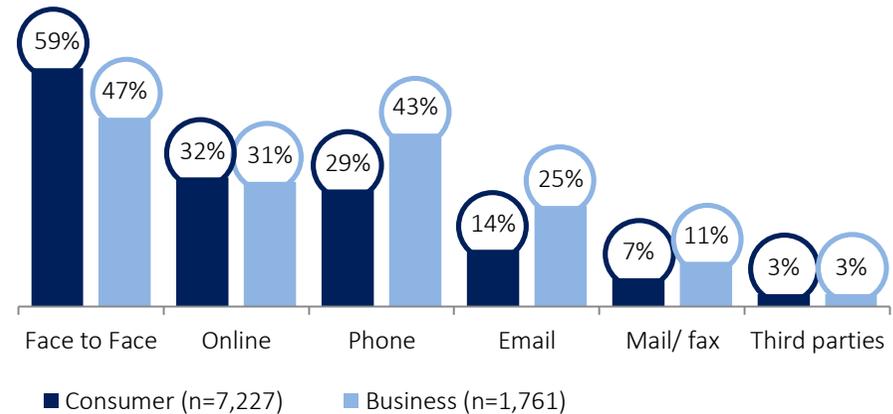
- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Key Finding 10: Customers' needs for improved access, simplicity and efficiency in processes can be enhanced through online services which are delivering positive experiences

Consistent to 2015, online is the second most common contact method through which consumers have had direct dealings with NSW Government services overall and third for businesses.

'Face to face' is still the most commonly used and preferred contact method for both consumers and businesses at a whole-of-government level. This is also consistent with 2015 findings.

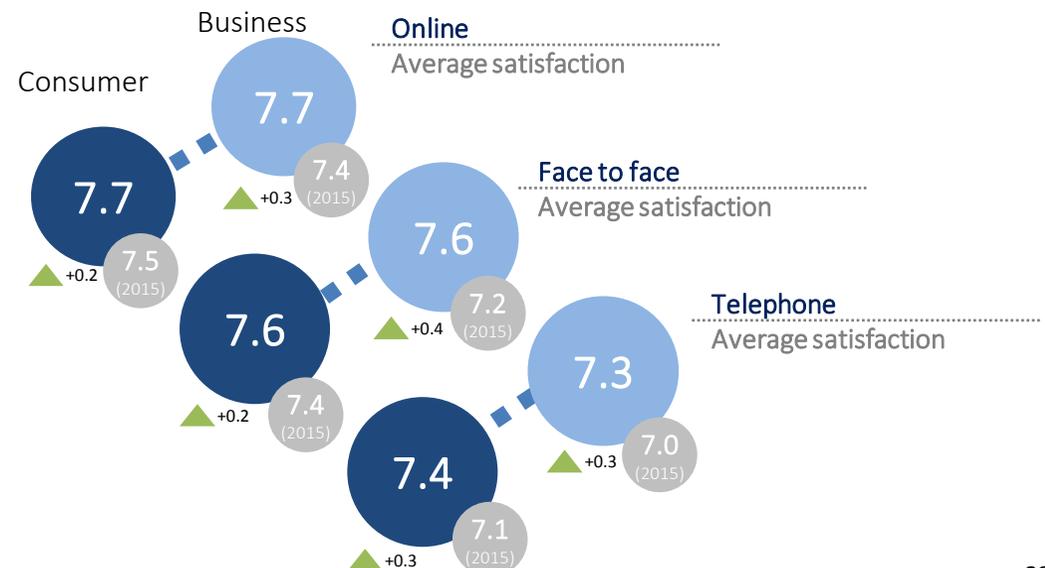
% Customers who have had direct dealings via this contact method (multi-select)



Similar to 2015, customers who have accessed NSW Government services online are more satisfied than those who have used other contact methods, linked to shorter wait times and simpler processes.

Overall satisfaction with NSW Government services for customers using online contact methods has shown a statistically significant increase since 2015, alongside telephone and 'face to face'.

Average customer satisfaction by contact method (Consumer and Business)



Legend:

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Key Finding 11: Consumers were more satisfied with the overall online experience with NSW Government services compared to 2015, whilst satisfaction with online services among businesses remain largely flat

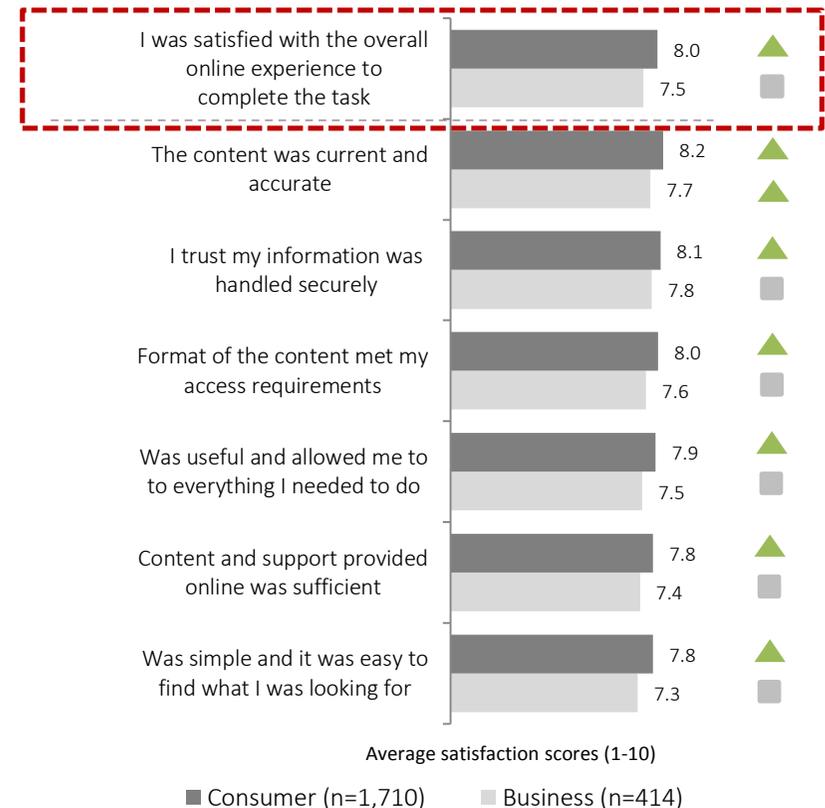
For consumers who had gone online to interact with NSW Government services, there has been a statistically significant increase in average agreement across all attributes.

Across attributes of online services, customers are more satisfied with 'the content was current and accurate' (8.2 for consumers and 7.7 for businesses) and 'I trust my information was handled securely' (8.1 for consumers and 7.8 for businesses).

The level of agreement is lower for services being 'simple and easy to find what I was looking for' (7.8 for consumers and 7.3 for businesses out of 10) and that the 'content and support provided was sufficient' (7.8 for consumers and 7.4 for businesses out of 10).

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?"

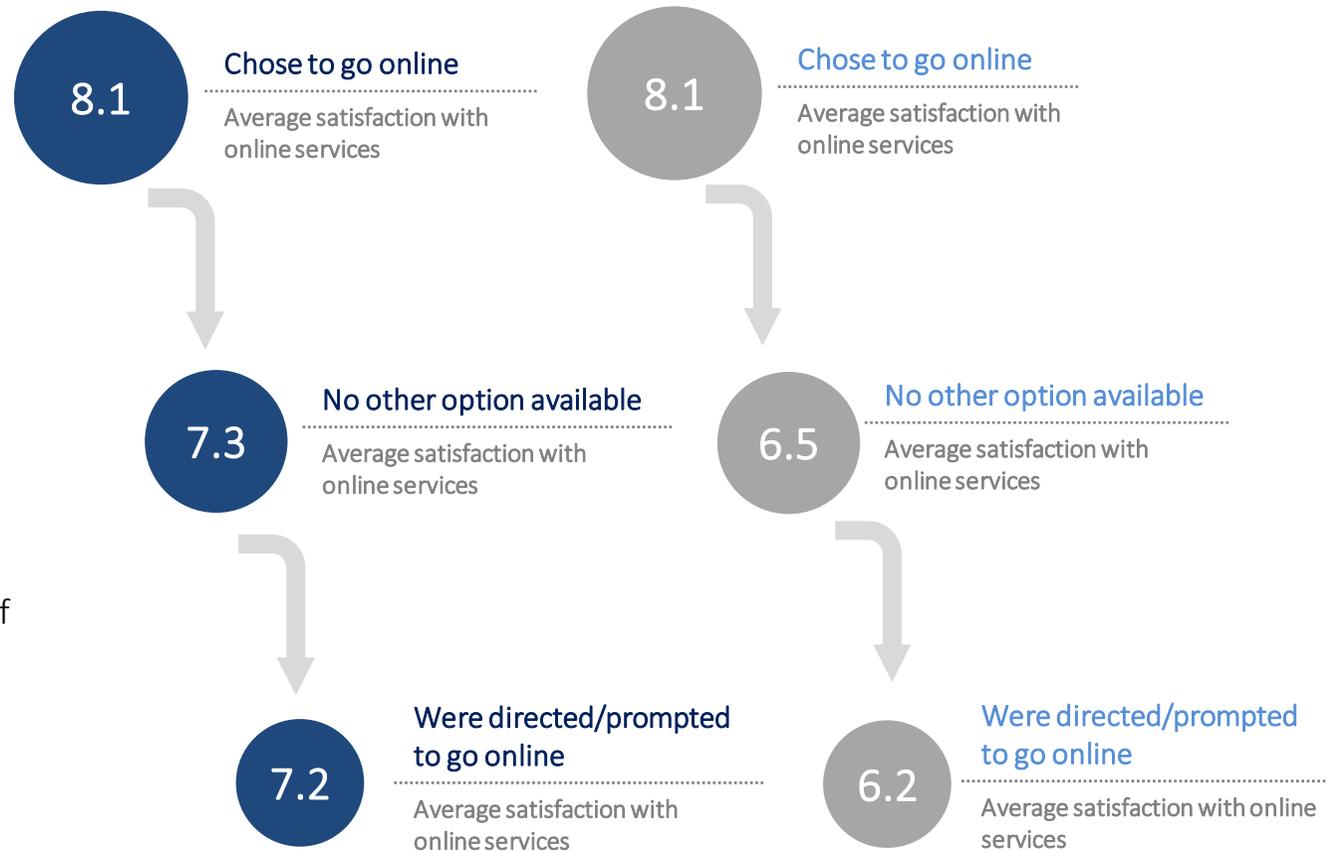


Legend:

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Key Finding 12: Customers who exercise a choice to go online have a higher average satisfaction with online services than those who were directed/prompted or have no choice

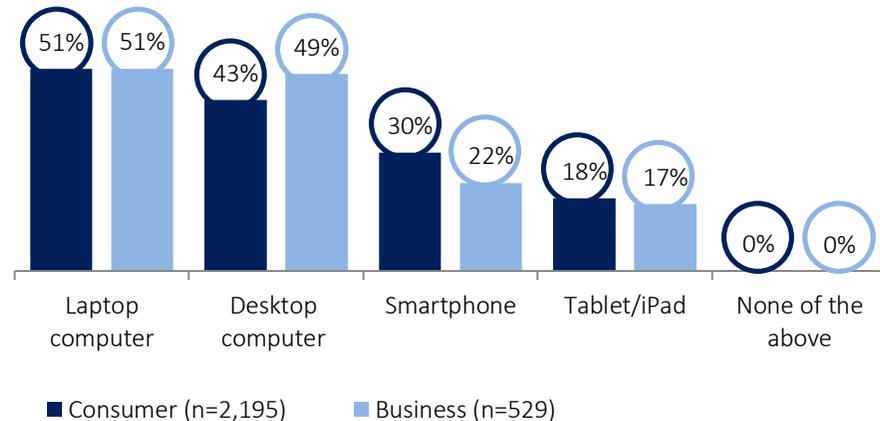
Of those customers who went online to carry out their direct dealings, those who chose to go online had the highest average satisfaction with online services (8.1 out of 10 for both consumers and businesses) followed by those who identified there was no other option available but online (7.3 out of 10 for consumers and 6.5 out of 10 for businesses).



Key Finding 13: A majority of customers use laptop computers to access online content, and satisfaction is highest for consumers using a tablet and businesses using a laptop.

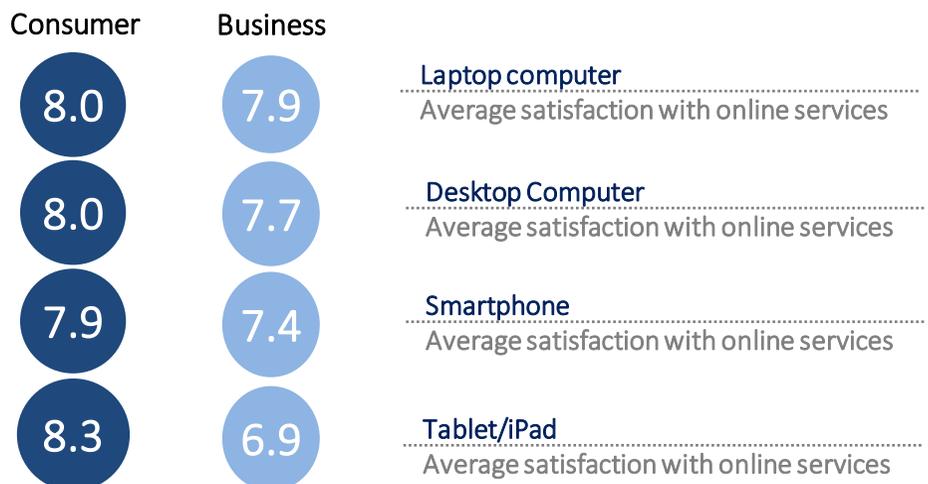
For customers who went online to carry out their direct dealings, the most used device were laptop computers followed by desktop computers. A tablet/iPad is the least used device by customers who went online.

Breakdown of devices used by customers who went online (multi-select)



Across consumers, those who used a tablet/iPad had the highest satisfaction with online services. For businesses, those who used a laptop computer had the highest satisfaction with online services.

Average satisfaction with online services by device used (multi-select)



Key Finding 14: Improvements to navigation, data security and accessibility are most likely to increase usage of online services by customers

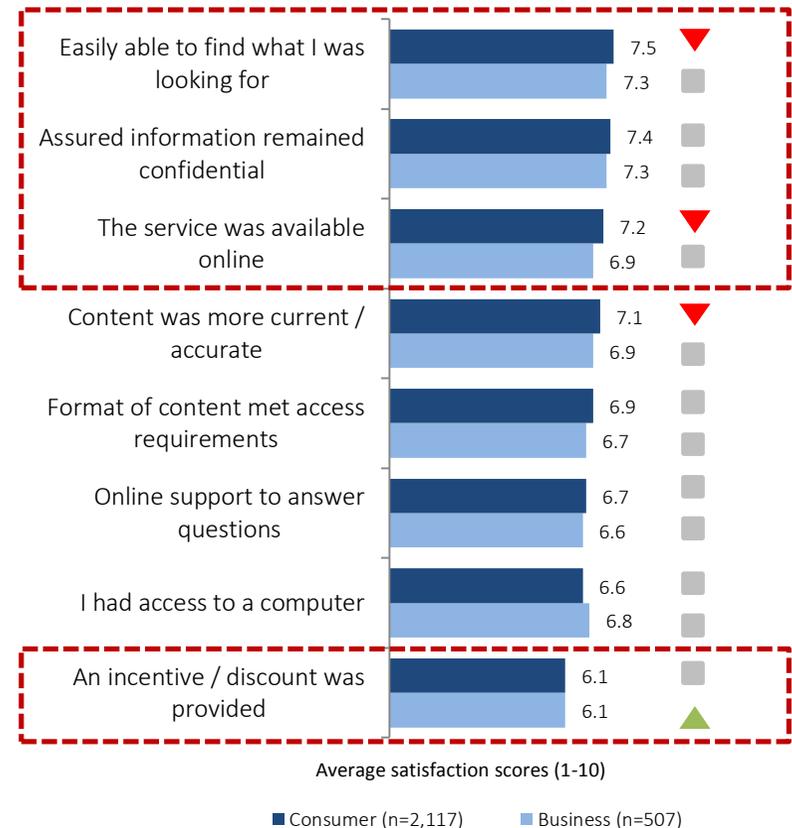
Customers who had not gone online to carry out direct dealings with NSW Government services in the last 12 months were asked to rate their level of agreement that certain improvements would encourage them to go online.

Consistent with 2015, consumers who currently use other contact methods would be more likely to go online if navigation, confidentiality of information and accessibility of the service were improved.

Across customers, incentives, such as a discount are least likely to increase adoption overall even though for businesses there has been a statistically significant increase in average score for agreement with this statement since 2015.

Adoption of online contact methods

Customers were asked "How much do you agree with the following statements in relation to the following service in NSW? I would go online if..."

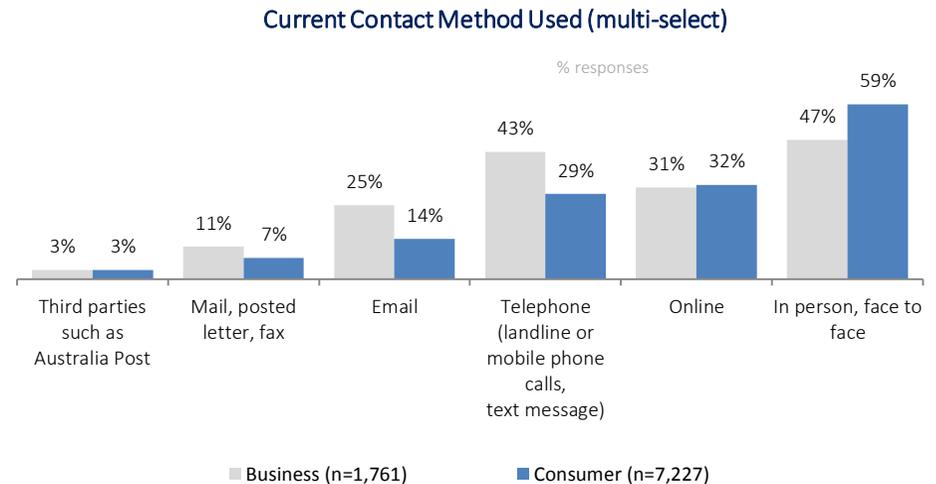


Legend:

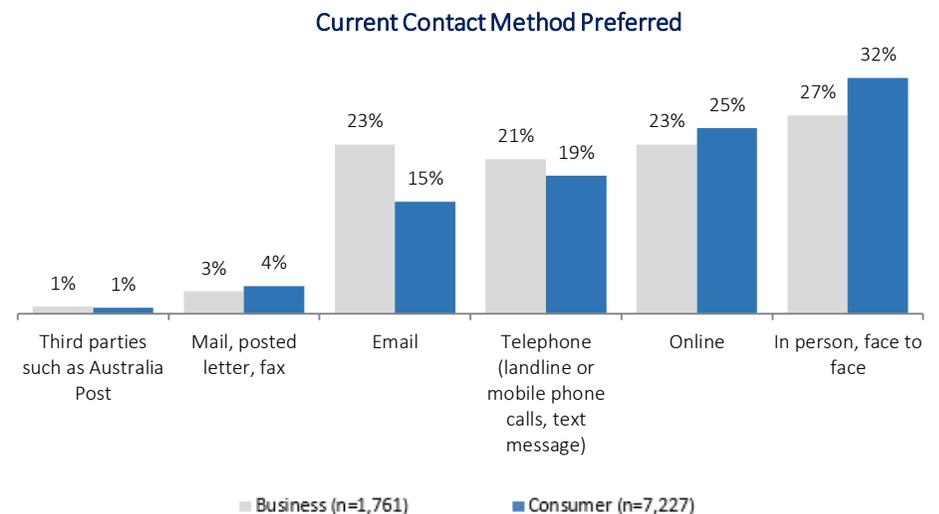
- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Key Finding 15: Face to face remains the most commonly used and preferred contact method to interact with NSW Government services for customers

Face to face remains the most commonly used contact method, this is followed by online channel among consumers, and telephone among businesses.



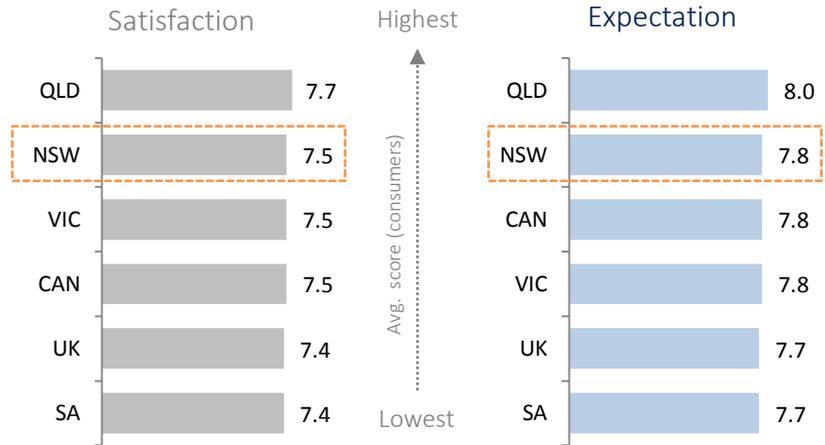
For both consumers and businesses, face to face is still the most preferred contact method, followed by online channel. Businesses has higher preference on email communication than consumers.



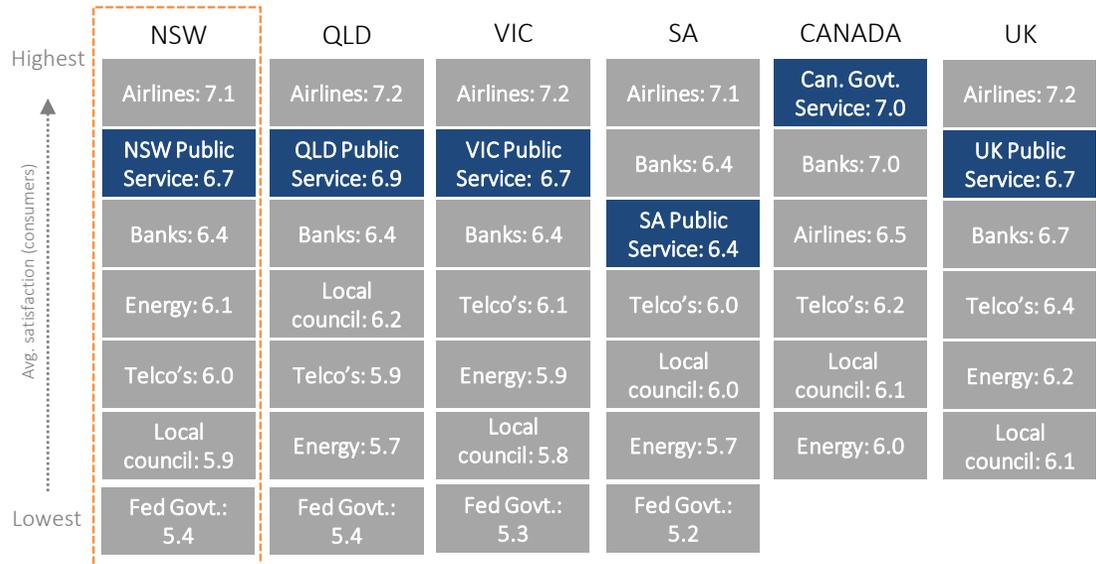


Key Finding 16: Consumer satisfaction and expectation of NSW Government services are the second highest compared to other jurisdictions, just behind Queensland

Compared to other jurisdictions, NSW Government has the second highest average satisfaction and expectation for consumers, following QLD. The gap between NSW and QLD is statistically significant.



For consumers, NSW Government has a positive 'brand' perception when compared to other industries, which is consistent across jurisdictions. Canadian Government services have the highest brand perception across all jurisdictions with an average score of 7.0 out of 10.



Key Finding 17: All jurisdictions have seen a positive shift across the overall measures of customer satisfaction, expectation and comparison to ideal service since 2015

For consumers, all jurisdictions have experienced a significant increase in average satisfaction, expectation and comparison to ideal since 2015. The only exception is for expectations for the UK as the increase was not statistically significant.

Performance of jurisdictions across overall measures

Consumer



For businesses, all jurisdictions have experienced an increase in average satisfaction, expectation and comparison to ideal since 2015. NSW is the only jurisdiction to have experienced statistically significant increases across all three measures.

Performance of jurisdictions across overall measures

Business



Legend: ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 ◻ No significant change in avg. from 2015 (at 99% level of Confidence)
 ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

¹Note: Across services in scope for both 2015 and 2016 (NSW, VIC, QLD, UK)

Detailed Findings

1. Overall performance - Key Findings 1, 2, 3, 4 & 5

2. Performance against customer satisfaction drivers - *Key Findings 6, 7 & 8*

3. Complaints handling - *Key Finding 9*

4. Perceptions of online services - *Key Findings 10, 11, 12, 13 & 14*

5. Variation in service contact method across services – *Key Finding 15*

6. Comparison of performance to other jurisdictions – *Key Findings 16 & 17*

Overall Performance

Areas covered in this section

1. Performance of NSW Government Services Against Measures.....p. 37
2. Customer satisfaction by demographicsp. 40
3. Perceptions of the NSW Public Sector 'brand'p. 42

Summary Findings

- Overall, results indicate there are positive perceptions of NSW Government services in the community with average satisfaction of 7.5 out of 10 for both consumers and businesses.
- However, satisfaction with the experience delivered by NSW Government services is slightly below customers' expectations (7.8 out of 10 for consumers; 7.9 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 2016 is 78.7 out of 100 for consumers and 78.4 out of 100 for businesses.
- More positive perceptions of NSW Government services are held by older, retired consumers and businesses based in regional and rural areas. Students have more negative perceptions of NSW Government services.
- Customer perceptions of the NSW Public Service overall (the 'brand') has significantly increased from 2015. However, consistent with 2015, satisfaction with the NSW Public Service overall is less than the NSW Government services highlighting a disconnect between customers' experiences of service delivery and their perceptions of the Public Service 'brand'.

Key Findings Covered in this Section:

Key Finding 1: There has been a statistically significant increase in customers' average satisfaction and expectation since 2015

Key Finding 2: There has been a significant increase in the Customer Satisfaction Index and customer perceptions of comparison to an ideal service from 2015 to 2016

Key Finding 3 Satisfaction with NSW Government Services continues to vary by demographics.

Key Finding 4: Gap to expectations varies by demographics with the gap decreasing with age amongst consumers, and smallest for those employed by businesses of more than 200 employees

Key Finding 5: Customer perception of the NSW Public Service overall has improved significantly from 2015, placing behind Airlines for 'brand' perception

Customer Views on Satisfaction and Expectations

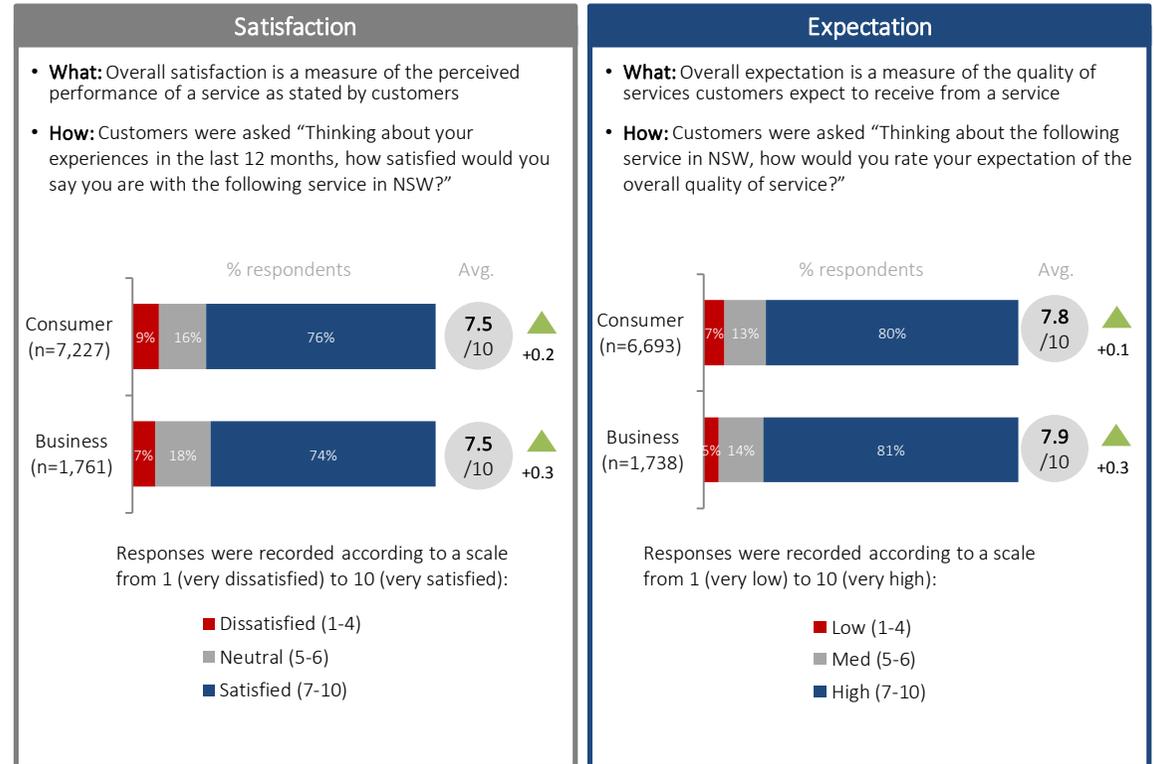
Overall satisfaction and expectations have increased significantly since 2015 for both consumers and businesses.

76% of consumers and 74% of businesses indicate they are satisfied with the services they have had direct dealings with in the last 12 months, with average satisfaction 7.5 for both consumers and businesses. Average satisfaction has significantly increased by 0.2 for consumers and by 0.3 for businesses (refer to Figure 1.1).

80% of consumers and 81% of 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 to Figure 1.1). Average expectation has significantly increased for consumers by 0.1 and by 0.3 for businesses.

Satisfaction and expectations are positively related (correlation of 0.81 for both consumers and businesses). The more satisfied customers become with government services they interact with, the higher their expectations are for future interactions.

Figure 1.1: NSW consumer and business satisfaction and expectation



Legend: ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
■ No significant change in avg. from 2015 (at 99% level of Confidence)
▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Performance of Services Compared to Expectations and Ideal Services

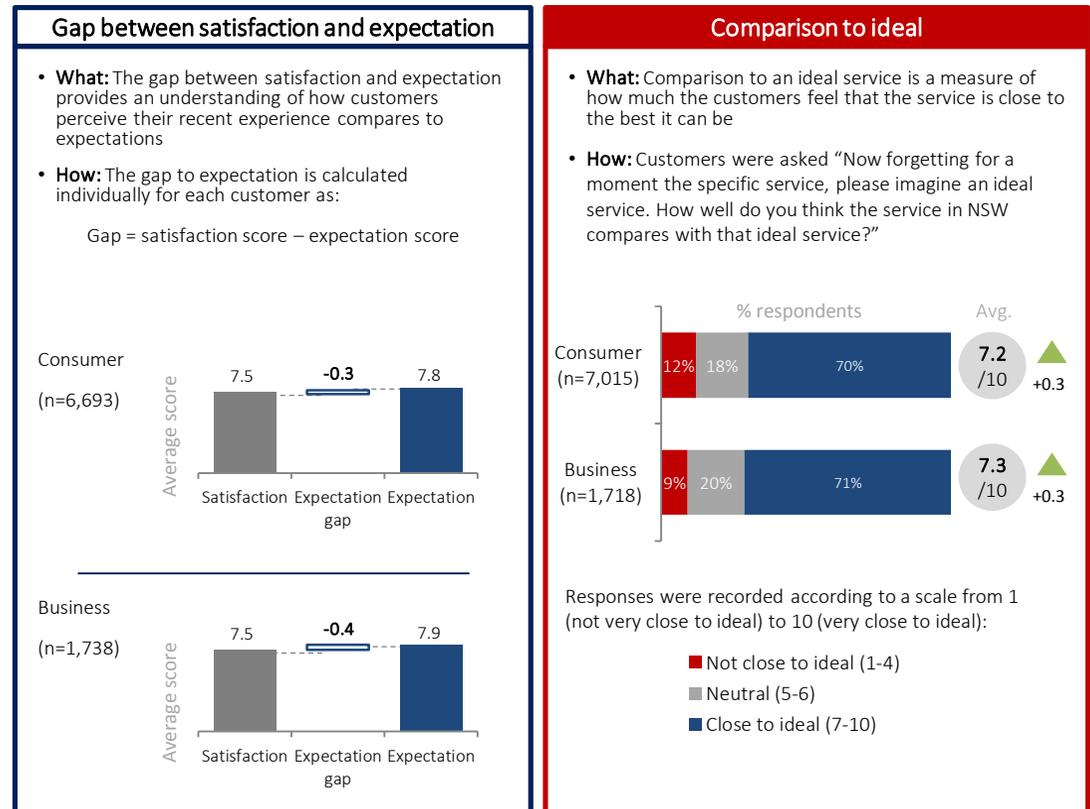
There has been a significant positive change in the comparison to ideal from 2015 for both NSW consumers and businesses.

Satisfaction with the experience delivered by NSW Government services (average score of 7.5 for consumers and 7.5 for businesses) is below expectations (average score of 7.8 for consumers and 7.9 for businesses).

The average gap between satisfaction and expectation is -0.3 for consumers and -0.4 for businesses (refer to Figure 1.2).

There is also a gap between customers' experiences compared to their ideal service, with 70% of consumers and 71% of businesses agreeing that the service they received is close to their 'ideal' experience.

Figure 1.2: Comparison of current NSW Performance to expectations and perceptions of an ideal service



Legend: ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 ■ No significant change in avg. from 2015 (at 99% level of Confidence)
 ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

NSW Customer Satisfaction Index

There has been a significant improvement in the Customer Satisfaction Index since 2015 for both consumers and businesses.

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 78.7 out of 100 for consumers (a significant increase of 2.0 since 2015) and 78.4 out of 100 for businesses (a significant increase of 1.8 since 2015) in 2016 (refer to Figure 1.3).

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 1.4 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 exceed.
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.

- Legend:
-  Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 -  No significant change in avg. from 2015 (at 99% level of Confidence)
 -  Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Figure 1.3: Customer satisfaction index score for 2016

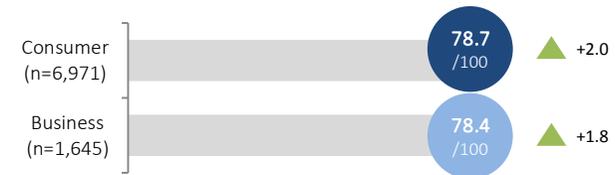
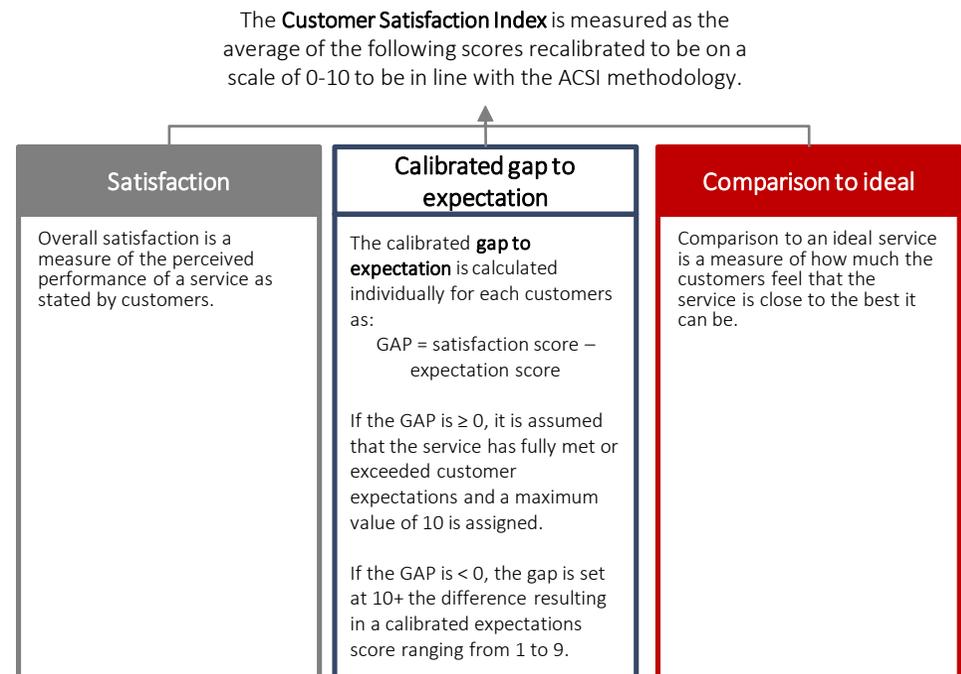


Figure 1.4: Customer satisfaction index methodology diagram



Difference in Consumer Satisfaction by Customer Demographics

Similar to 2015, customer satisfaction varies by demographic with the most significant difference by age, region and employment status.

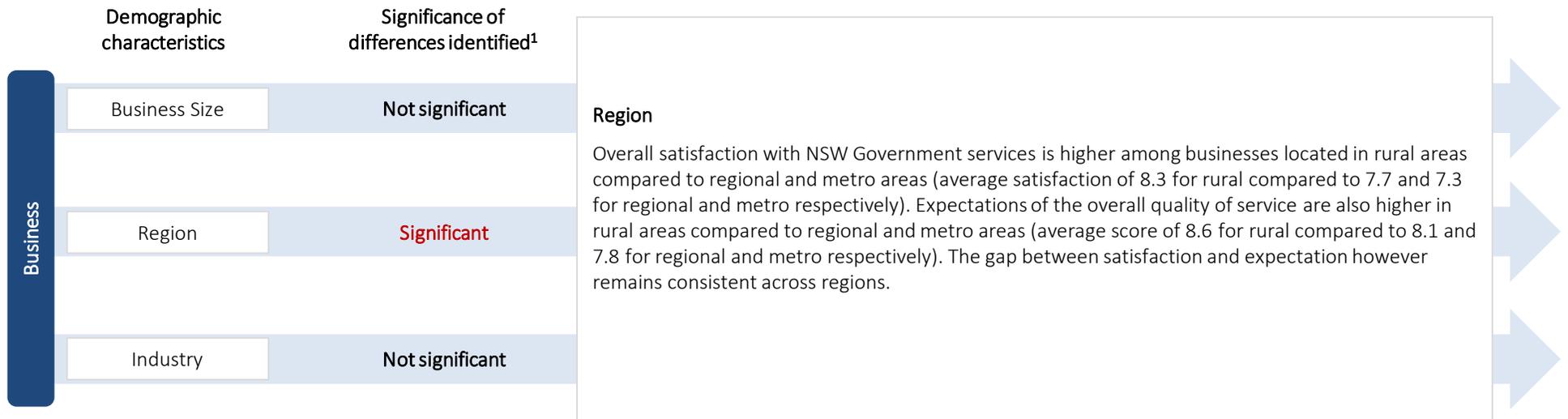
	Demographic characteristics	Significance of differences identified ¹	
Consumer	Age	Significant	<p>Age</p> <p>Across the NSW citizen population, consumers who are older (aged 55+) and/or are retired are more satisfied with NSW Government services they have had direct dealings with (average satisfaction of 8.0 for consumers aged 55+ compared to 7.3 for those under 55 years of age), with 76% agreeing their experience is close to an 'ideal' service (compared to 67% for consumers under 55 years of age).</p>
	Region	Significant	<p>Region</p> <p>Overall satisfaction with NSW Government services is higher for consumers in regional and rural areas compared to metro areas (average satisfaction of 7.9 and 7.6 for regional and rural respectively compared to 7.4 for metro). 76% of consumers in regional areas agreeing their experience is close to an 'ideal' service (compared to 75% for rural and 68% for metro). Differences in expectations of the overall quality of service is also significant (average score of 8.1 and 7.9 for regional and rural respectively compared to 7.7 for metro). The gap to expectation is also significant at -0.2 for both regional and rural and -0.3 for metro.</p>
	Employment status	Significant	<p>Employment Status</p> <p>Students and people employed full time are less satisfied with the NSW Government services they use (average satisfaction of 7.2 for students and 7.3 for people employed full time compared to 7.6 for consumers with other listed employment status). Fewer agree their experience is close to an 'ideal' service among students and unemployed (64% of students; 63% of consumers who are unemployed or not working compared to 72% for consumers with other listed employment statuses).</p>
	Gender	Not significant	
	Income	Not significant	

Note: Further detail on differences by demographics is available in Appendix B: Detailed differences by demographics.

¹Note: Significant differences identified at the 99% 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.

Difference in Consumer Satisfaction by Business Demographics

Consistent with 2015, businesses located in rural areas are more satisfied with the NSW Government services they interact with.



Note: Further detail on differences by demographics is available in Appendix B: Detailed differences by demographics.

¹Note: Significant differences identified at the 99% 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’

Customer perceptions of ‘brand’ has significantly increased from 2015. However, consistent with 2015, satisfaction with the NSW Public Service overall is less than with NSW Government services.

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 Australian industries and public services.

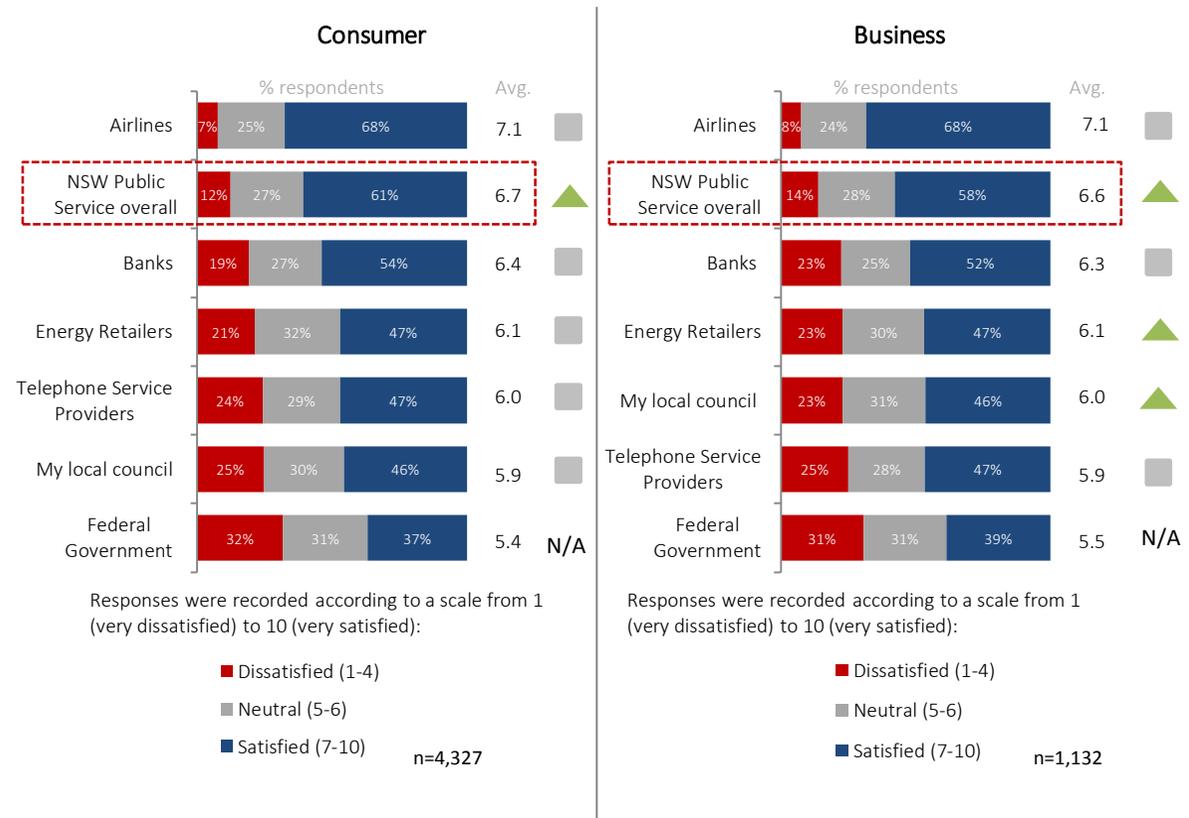
Results show public satisfaction with the NSW Public Service ‘brand’ compares favourably with that of other industries. Average satisfaction with the NSW Public Service ‘brand’ is 6.7 for consumers and 6.6 for businesses, but behind airlines (average score of 7.1 for consumers and businesses). Refer to Figure 1.5 for further detail.

From 2015 - 2016, for consumers, it was the only brand to see a significant increase, and for businesses, the NSW Public Service overall has significantly increased alongside Energy Retailers and Local Councils.

Consistent with 2015, satisfaction with the NSW Public Service ‘brand’ is significantly less than with NSW Government services overall (average score of 7.5 for both consumers and 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.

Figure 1.5: 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?”



Legend: ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 ■ No significant change in avg. from 2015 (at 99% level of Confidence)
 ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

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', 'friendly', 'capable', 'knowledgeable' and 'respectful' (refer to Figure 1.6).

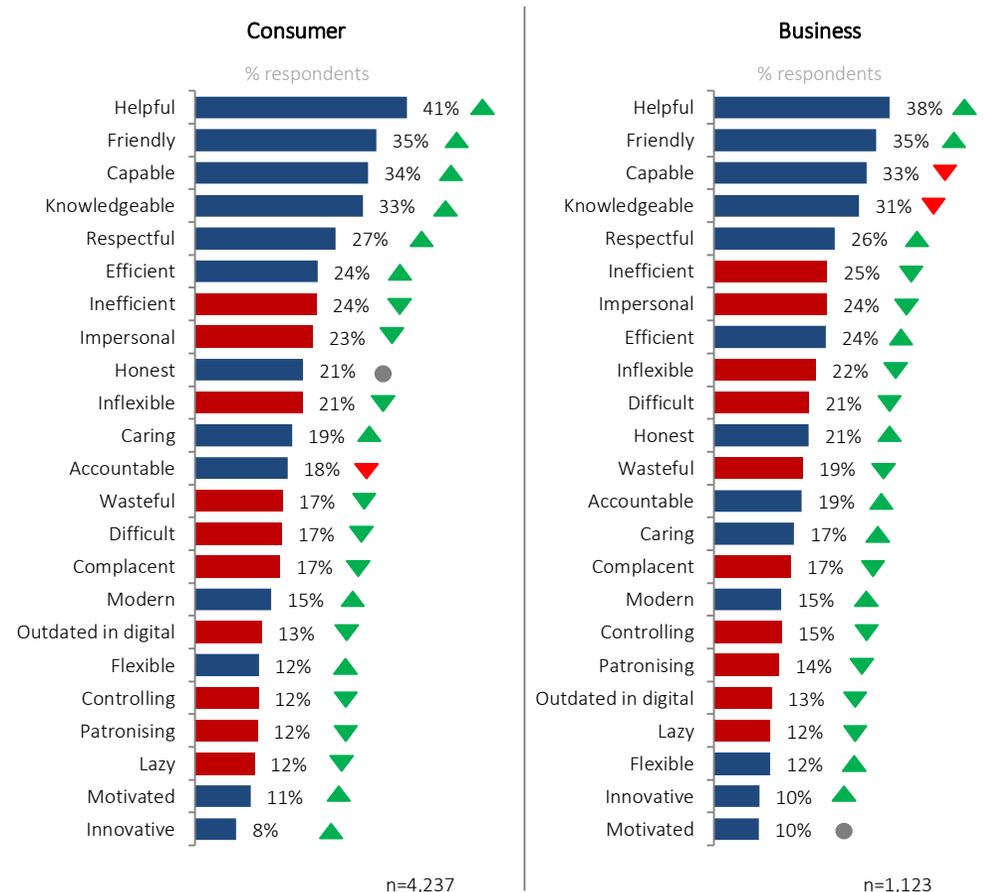
Similar to 2015, the next most commonly selected words to describe the NSW Public Service are the negative descriptors of *impersonal and inefficient*.

Very few customers identify the NSW Public Service to be 'innovative' (8% of consumers and 10% of businesses).

Customers who are more satisfied with the NSW Public Service overall more commonly select positive attributes to describe the NSW 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.

Figure 1.6: 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?"



 Positive / negative descriptor of the NSW Public Service Brand

Detailed Findings

1. Overall performance - *Key Findings 1, 2, 3, 4 & 5*

2. Performance against customer satisfaction drivers - *Key Findings 6 ,7 & 8*

3. Complaints handling - *Key Finding 9*

4. Perceptions of online services - *Key Findings 10, 11, 12, 13 & 14*

5. Variation in service contact method across services – *Key Finding 15*

6. Comparison of performance to other jurisdictions – *Key Findings 16 & 17*

Performance against Customer Satisfaction Drivers

Areas covered in this section

1. Customer Views on NSW Government Services Employee Performance.....p. 42
2. Customer Views on Performance of NSW Government Services Against Values.....p. 45
3. Customers Views on Performance of NSW Government Services Against Process Attributes...p. 48
4. Customers Views on Performance of NSW Government Services Against Goals.....p. 51
5. Drivers of Customer Satisfaction.....p. 53

Summary Findings:

- There have been more significant positive shifts from 2015 to 2016 for employee and goal related attributes for consumers, compared to businesses.
- There has been a larger overall positive shift from 2015 to 2016 for employees and goals related attributes for NSW businesses, compared to consumers.
- NSW Government services' employees were rated highest against the attributes of safety standards, honesty 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.
- Older, retired consumers, those living in regional areas, and those on middle incomes are more positive in their views of NSW Government service employees; students, full time employees and those on higher incomes have less positive views.
- Customers were positive about the performance of NSW Government services against the values of integrity and trust and were less positive in their perceptions of performance against the value of accountability and providing good service.
- Consistent with variations identified in employee performance older, retired consumers and those living in regional areas are more positive in their views of NSW Government services performance against the values; full time employees, consumers living in metro areas and those on higher incomes are less positive.
- Consistent with variations identified in employee businesses in the electricity, gas, water and waste services industry are more positive in their views of NSW Government services performance against values.
- Consistent with the findings from 2015, 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.

Key Findings Covered in this Section:

Key Finding 6: Whilst the drivers of customer satisfaction are consistent to 2015, the order of priority varies slightly in 2016

Key Finding 7: Primary opportunity areas are consistent to 2015 with efficiency and effectiveness of employees, and access identified as opportunities to drive increases in satisfaction

Key Finding 8: Satisfaction drivers vary across services implying a need for targeted service actions to support whole-of-government outcomes

Customer Views on NSW Government Performance against Services Employees

NSW Government services' employees were rated highest against the attributes of safety standards, honesty and provide services without bias; performance was rated lowest against accountability, getting things done as quickly as possible and seeing things from the customers' 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 7.6 for consumers and 7.7 for businesses), 'deliver high safety standards' (average score of 7.6 for consumers and 7.7 for businesses) and 'provide services without bias' (average score of 7.6 for consumers and 7.5 for businesses).

Employee performance was rated lowest against the attributes of 'are held accountable' (average score of 7.0 for consumers and businesses), 'get things done as quickly as possible' (average score of 7.0 for consumers and businesses) and 'see things from my perspective' (average score of 6.9 for consumers and 7.0 for businesses).

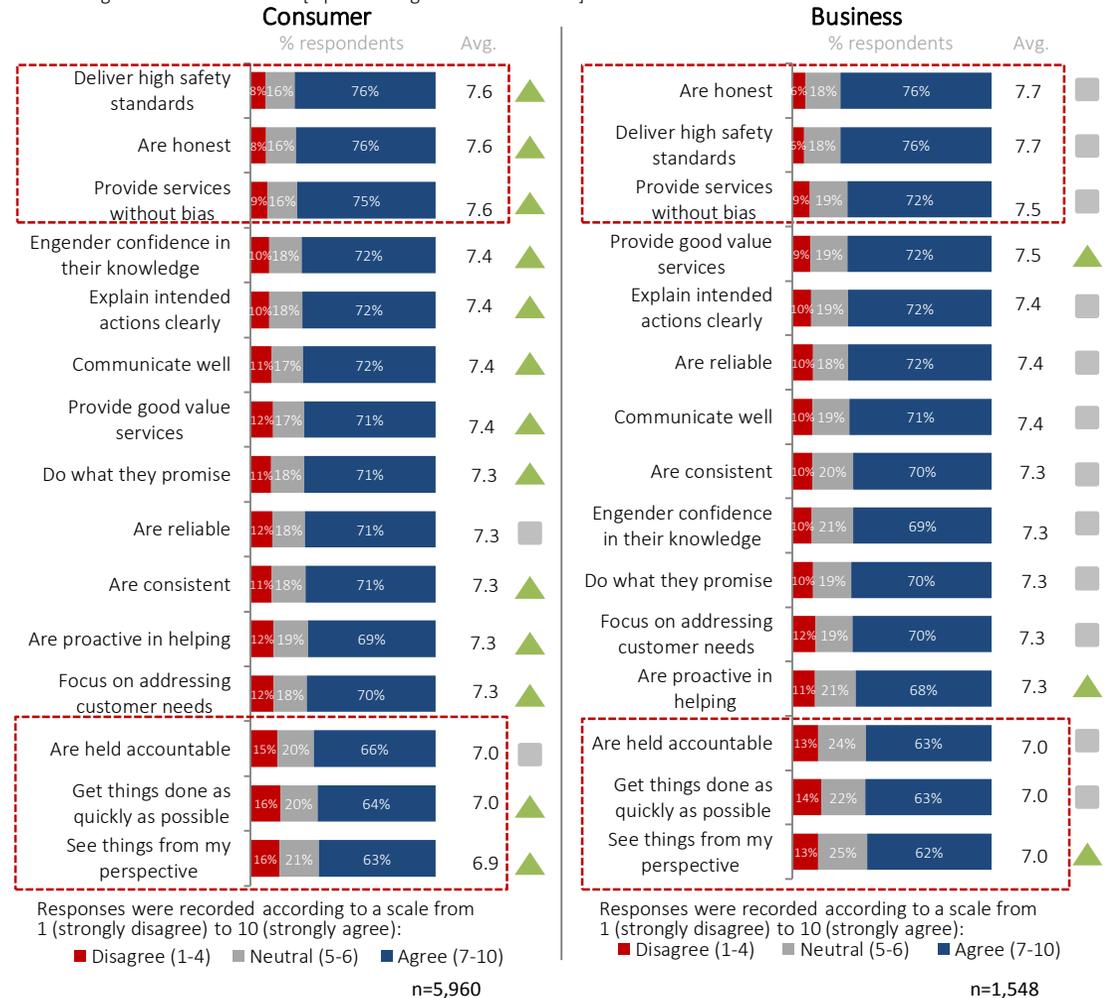
There has been a significant increase in average satisfaction across most employee related attributes for consumers from 2015 to 2016. Whilst all attributes have experienced an increase in satisfaction, 'are reliable' and 'are held accountable' are the only attributes that have experienced a non-significant increase for consumers.

For business, the attributes 'provide good value services', 'are proactive in helping' and 'see things from my perspective' have improved significantly from 2015 to 2016.

Figure 2.1 provides further detail on performance against all employee related attributes included in the survey.

Figure 2.1: Performance of NSW Government Services against each of the employee related 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?"



Legend: ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 ■ No significant change in avg. from 2015 (at 99% level of Confidence)
 ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Differences in Consumers Views on Employee Performance by Demographics

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

	Demographic characteristics	Significance of differences identified ¹	
Consumer	Age	Significant	<p>Age Consumers aged 55+ are more positive about the performance of NSW Government services employees across all attributes, in particular rating them higher on ‘provide services without bias’ and ‘are honest’ (average scores of 8.1 for consumers aged 55+ and 7.4 for consumers under 55 years of age).</p> <p>Region Consumers who live in regional and rural areas are more positive in their perceptions of NSW Government service employees across all attributes, in particular rating them higher on ‘focus on addressing customer needs’, ‘are proactive in helping’ and ‘are reliable’ (average scores of 7.5 for regional and rural compared to 7.2 for metro).</p> <p>Employment Status 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, unemployed consumers are less positive that NSW Government services employees ‘see things from my perspective’ (average score of 6.3 compared to overall average of 6.9).</p> <p>Income 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>
	Region	Significant	
	Employment status	Significant	
	Income	Significant	
	Gender	Not significant	

¹Note: Significant differences identified at the 99% 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 Business Views on Employee Performance by Demographics

Perceptions of NSW Government services employees varies by industry and region.

	Demographic characteristics	Significance of differences identified ¹	
Business	Industry	Significant	<p>Industry</p> <p>Businesses within the ‘electricity, gas, water and waste services’ industry are more positive that NSW Government services employees ‘are consistent’ (average score of 9.1 compared to overall average of 7.3), ‘are proactive in helping’ and ‘do what they promise’ (average score of 9.2 compared to overall average of 7.3), ‘see things from my perspective’ (average score of 9.2 compared to overall average of 7.0), ‘explain intended actions clearly’ (average score of 9.0 compared to overall average of 7.4) and ‘get things done as quickly as possible’ (average score of 8.7 compared to overall average of 7.0).</p> <p>Businesses within the ‘education and training’ industry are more positive that NSW Government services employees ‘communicate well’ (average score of 8.1 compared to overall average of 7.4).</p> <p>Businesses within the ‘agriculture, forestry and fishing’ industry are more positive that NSW Government services employees ‘provide good value services’ (average score of 8.7 compared to overall average of 7.5).</p>
	Business size	Not significant	
	Region	Significant	<p>Region</p> <p>Businesses located in rural NSW are more positive across all employee related attributes when compared to Businesses overall averages and other NSW regions. Businesses located in metro NSW perceive employees to be significantly lower in the attributes ‘deliver high safety standards’ (average score of 7.6 compared to an average score of 8.8 from businesses located in rural NSW), ‘explain intended actions clearly’ (average score of 7.3 compared to an average score of 8.3 from businesses located in rural NSW), ‘focus on addressing customer needs’ (average score of 7.1 compared to an average score of 8.3 from businesses located in rural NSW) and ‘get things done as quickly as possible’ (average score of 6.9 compared to an average score of 8.1 from businesses located in rural NSW).</p>

¹Note: Significant differences identified at the 99% 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 Values

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

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 7.3 for consumers and businesses) and trust (average score of 7.2 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 2.2 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 and providing good service (average scores of 7.1 for consumers and businesses) which is consistent with the lower rating of NSW Government service employees against the attribute of 'are accountable'.

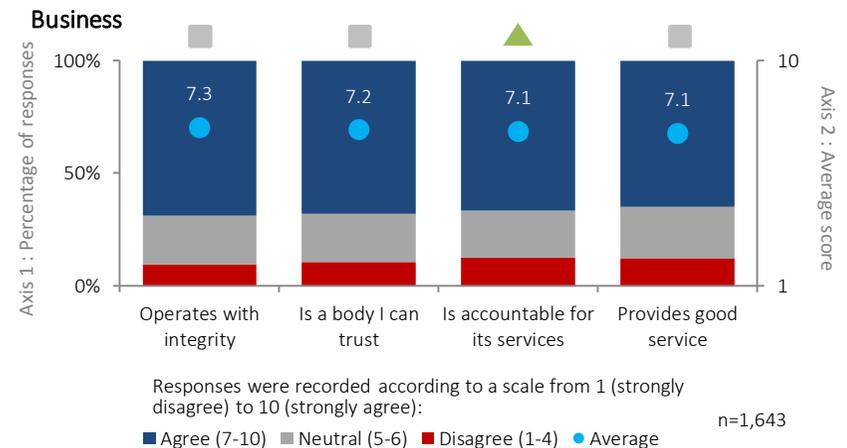
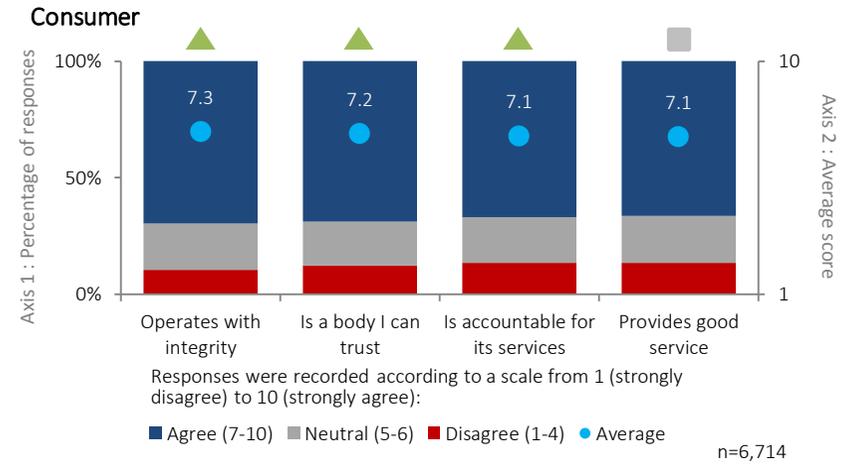
There has been a significant increase in average satisfaction across most values related attributes for consumers from 2015 to 2016. Whilst all attributes have experienced an increase in satisfaction, 'provides good service' is the only attribute that has experienced a non-significant increase.

For business, all attributes have experienced an increase in satisfaction from 2015 to 2016. For the attribute 'is accountable for its services' this increase is statistically significant.

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 goals 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.

Figure 2.2: 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?"



Legend:

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)



Differences in Consumer Views on Performance Against Values by Demographics

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

	Demographic characteristics	Significance of differences identified ¹	
Consumer	Age	Significant	Age 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 7.6 for consumers aged 55+ and 7.1 for consumers under 55 years of age).
	Region	Significant	Region 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 on 'operates with integrity' higher (average score of 7.5 for regional and rural compared to 7.2 for metro).
	Employment status	Significant	Employment Status 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, in particular rating on 'provides good service' lower (average score of 6.9 compared to overall average of 7.1).
	Income	Significant	Income 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 over \$180k are less positive in about the performance of NSW Government services across all values, in particular rating 'provides good service' lower (average score of 6.7 compared to overall average of 7.1).
	Gender	Not significant	

¹Note: Significant differences identified at the 99% 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 Business Views on Performance Against Values by Demographics

Consistent with variations identified in employee businesses in the electricity, gas, water and waste services industry are more positive in their views of NSW Government services performance against values.

	Demographic characteristics	Significance of differences identified ¹	
Business	Industry	Significant	<p>Industry</p> <p>Businesses in the 'electricity, gas, water and waste services' industry are more positive about NSW Government services performance against all values; 'operates with integrity' (average score of 9.0 compared to overall average of 7.3), 'is a body I can trust' (average score of 9.0 compared to overall average of 7.2), 'is accountable for its services' (average score of 8.9 compared to overall average of 7.1) and 'provides good service' (average score of 8.6 compared to overall average of 7.1).</p>
	Business size	Not significant	
	Region	Not significant	

¹Note: Significant differences identified at the 99% 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 ‘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 7.0 for consumers and businesses). The lowest rated process attribute for NSW Government service processes was ‘processes are designed to reduce wait times’ (average score of 6.5 for consumers and 6.6 for businesses). Refer to Figure 2.3 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.’

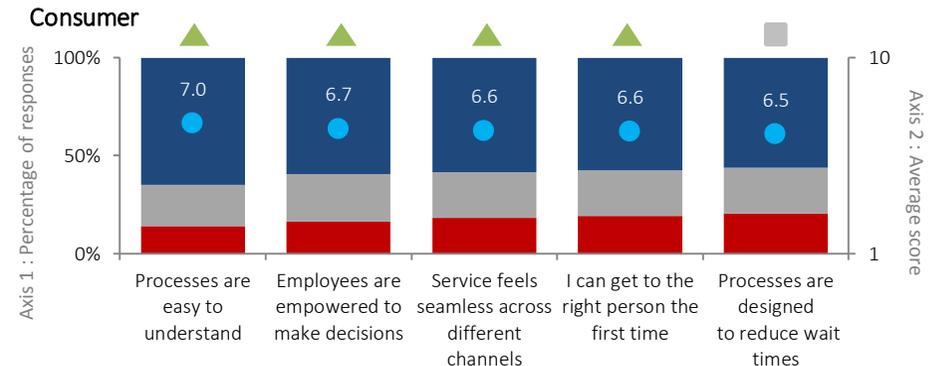
Perceptions of NSW Government service processes are also higher among customers who have gone online to carry out direct dealings with NSW Government services, compared to those who have used other contact methods. This result suggests that online services may be bypassing some of the difficulties in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

For consumers, all attributes have experienced an increase in satisfaction from 2015 to 2016. All increases have been statistically significant except for the attribute ‘processes are designed to reduce wait times’.

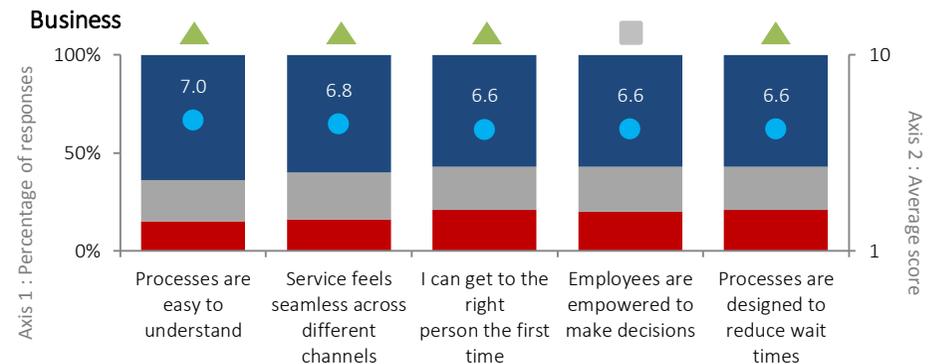
For businesses, all attributes have experienced an increase in satisfaction from 2015 to 2016. All increases have been statistically significant except for the attribute ‘employees are empowered to make decisions’.

Figure 2.3: 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?”



Responses were recorded according to a scale from 1 (strongly disagree) to 10 (strongly agree):
 ■ Agree (7-10) ■ Neutral (5-6) ■ Disagree (1-4) ● Average n=5,895



Responses were recorded according to a scale from 1 (strongly disagree) to 10 (strongly agree):
 ■ Agree (7-10) ■ Neutral (5-6) ■ Disagree (1-4) ● Average n=1,545

- Legend:**
- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 - No significant change in avg. from 2015 (at 99% level of Confidence)
 - ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Differences in Consumer Views on Government Processes by Demographics

Perceptions of NSW Government service processes vary among consumers by age, region, employment status and income.

	Demographic characteristics	Significance of differences identified ¹	
Consumer	Age	Significant	<p>Age</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 6.2 for consumers aged 35 to 54 compared to 6.5 and 6.7 for consumers aged under 34 and over 55 respectively).</p>
	Region	Significant	<p>Region</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 easy to understand' (average score of 7.1 for regional/rural compared to 7.0 for metro).</p>
	Employment status	Significant	<p>Employment Status</p> <p>Retirees are more positive about the performance of NSW Government services processes across all attributes. Consumers who are self employed/business owners are less positive that 'employees are empowered to make decisions' (average score of 6.3 compared to 6.7 overall).</p>
	Income	Significant	<p>Income</p> <p>Consumers in the income bracket of over \$180k 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 overall average of 6.5).</p>
	Gender	Not significant	

¹Note: Significant differences identified at the 99% 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 Businesses Views on Performance Against Processes by Demographics

Consistent with variations identified in employee and values the electricity, gas, water and waste services industry are more positive in their views of NSW Government services performance against processes as are businesses located in regional and rural areas.

Business	Demographic characteristics	Significance of differences identified ¹	Industry
	Industry	Significant	<p>Businesses in the ‘electricity, gas, water and waste services’ industry are more positive about NSW Government services performance against the process attributes ‘processes are designed to reduce wait times’ (average score of 8.5 compared to overall average of 6.6), ‘employees are empowered to make decisions’ (average score of 8.5 compared to overall average of 6.6) and ‘I can get to the right person the first time’ (average score of 8.6 compared to overall average of 6.6).</p>
	Business size	Not significant	<p>Businesses in the ‘agriculture, forestry and fishing’ industry are more positive about NSW Government services performance against the process attribute ‘processes are easy to understand’ (average score of 8.2 compared to overall average of 7.0).</p>
	Region	Significant	<p>Businesses in the ‘retail trade’ industry are more positive about NSW Government services performance against the process attribute ‘services feels seamless even if I have to communicate across different contact methods’ (average score of 7.4 compared to overall average of 6.8).</p>
			Region
			<p>Businesses who are located in regional and rural areas are more positive in their perceptions of NSW Government services performance against each of the process attributes, in particular rating them higher on ‘processes are easy to understand’ (average score of 7.3 for regional and rural compared to 6.9 for metro).</p>

¹Note: Significant differences identified at the 99% 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 Goals

Customers are 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, openness and transparency and public consultation, based on their recent experiences in dealing with services directly.

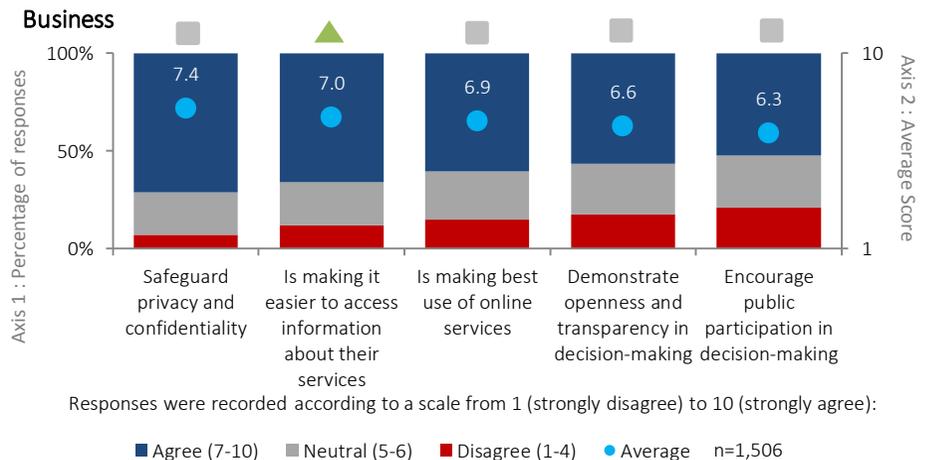
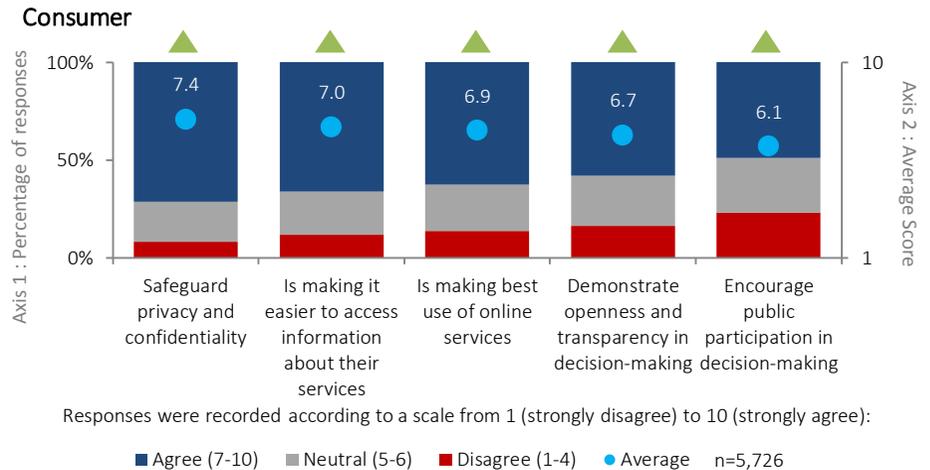
Overall, customers are more positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ (average score of 7.4 for consumers and businesses), however fewer agree that services ‘encourage public participation in decision making’ (average score of 6.3 for consumers and 6.3 for businesses). Refer to Figure 2.4 for further detail on performance against processes attributes.

For consumers, all attributes have experienced a statistically significant increase in satisfaction from 2015 to 2016. The attribute that has experienced the largest significant increase is ‘is making it easier to access information about their services’.

For businesses, all attributes have experienced an increase in satisfaction from 2015 to 2016. The only statistically significant increase is for the attribute ‘is making it easier to access information about their services’.

Figure 2.4: 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?”



Legend:

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Differences in Customer Views on Performance Against Goals by Customer Demographics

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

	Demographic characteristics	Significance of differences identified ¹	
Consumer ²	Age	Significant	<p>Age</p> <p>Consumers aged 55+ are more positive that NSW Government services ‘safeguard privacy and confidentiality’ (average score of 7.7 compared to 7.3 for consumers under 55), ‘is making it easier to access information about their services’ (average score of 7.2 compared to 7.1 for consumers under 55), ‘is making best use of online services to improve convenience and efficiency for customers’ (average score of 7.1 compared to 6.8 for consumers under 55) and ‘demonstrate openness and transparency in decision-making (average score of 8.6 compared to 6.6 for consumers aged under 55). Consumers aged below 55 are more positive that NSW Government services ‘encourage public participation in decision-making’ (average score of 6.2 compared to 6.0 for consumers aged 55+).</p> <p>Employment Status</p> <p>Retirees are more positive about the performance of NSW Government services against each of the goals, except for ‘encourage public participation in decision making’.</p> <p>Income</p> <p>Consumers in the income bracket of \$30k to \$50k are more positive about NSW Government services performance against all goals followed by consumers in the income bracket of \$50k to \$100k. Consumers in the income bracket of over \$180k are less positive about NSW Government services performance against all goals.</p>
	Region	Not Significant	
	Employment status	Significant	
	Income	Significant	
	Gender	Not significant	

¹Note: Significant differences identified at the 99% 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.

²Note: No significant differences were identified for Business customers across demographics.

Drivers of Customer Satisfaction

Similar to 2015, eight key drivers of overall satisfaction were identified based on groupings of the employee, process, goal and value attributes.

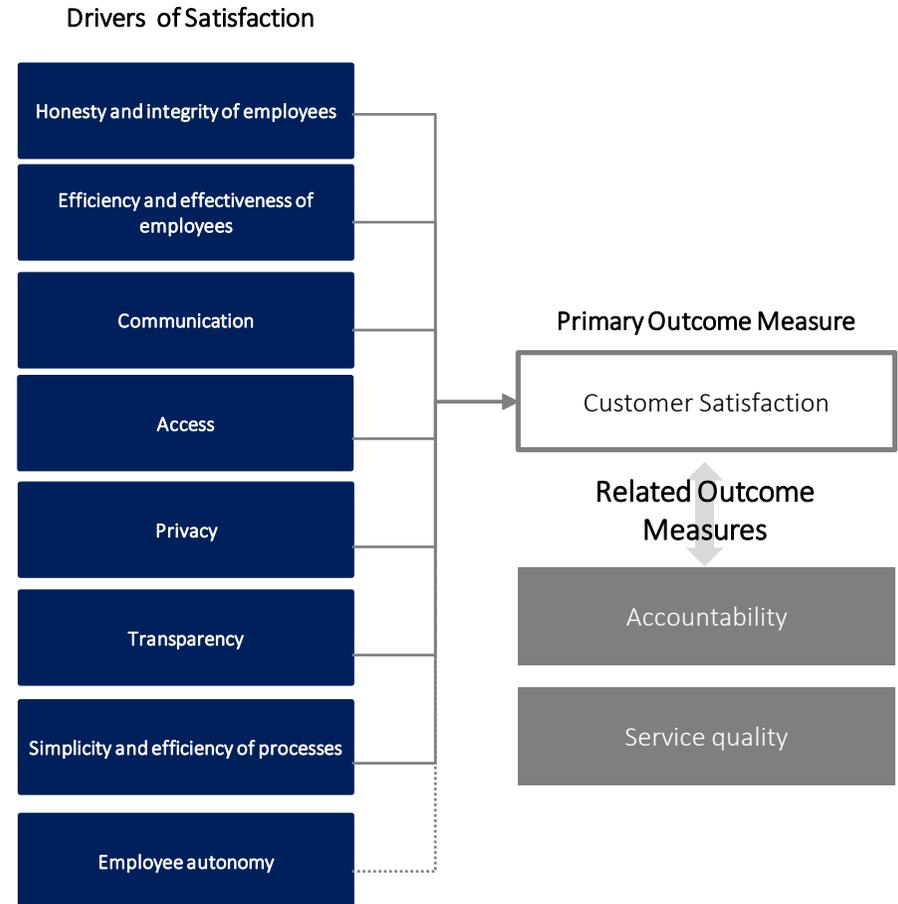
Analysis was undertaken to identify the key drivers of satisfaction with NSW Government services within each of the outcome areas (employees, processes, goals and values).

Consistent with 2015, eight key drivers of customer satisfaction with NSW Government services that are consistent with 2015 :

1. Honesty and integrity of employees
2. Efficiency and effectiveness of employees
3. Communication
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

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.

Figure 2.5: Drivers of overall satisfaction with NSW Government Services



Changes to the Drivers of Customer Satisfaction in 2016

While the eight drivers were consistent with 2015, the groupings of attributes have changed slightly.

Drivers of customer satisfaction - 2015

Employees	Honesty and integrity of employees <ul style="list-style-type: none"> Provide services without bias Are honest Deliver high safety standards Do what they promise Are reliable 	Efficiency and effectiveness of employees <ul style="list-style-type: none"> Get things done as quickly as possible Are held accountable Focus on addressing customer needs See thing from my perspective Provide good value services Are proactive in helping 	Communication <ul style="list-style-type: none"> Explain intended actions clearly Communicate well Engender confidence in their knowledge Are consistent
	Simplicity and efficiency of processes <ul style="list-style-type: none"> Processes are designed to reduce wait times Processes are easy to understand Service feels seamless even if I have to communicate across different channels I can get to the right person the first time 		Employee autonomy <ul style="list-style-type: none"> Employees are empowered to make decisions
	Privacy <ul style="list-style-type: none"> Safeguard privacy and confidentiality 	Transparency <ul style="list-style-type: none"> Encourage public participation in decision making Demonstrate openness and transparency in decision making 	Access <ul style="list-style-type: none"> Is making best use of online services to improve convenience and efficiency for customers Is making it easier to access information about their service
Goals			
	Service quality <ul style="list-style-type: none"> Provides good service Operates with integrity Is a body that I can trust 	Accountability <ul style="list-style-type: none"> Is accountable for its services 	

Drivers of customer satisfaction - 2016

Employees	Honesty and integrity of employees <ul style="list-style-type: none"> ▲ Deliver high safety standards ▼ Provide services without bias ▼ Are honest ● Engender confidence in their knowledge 	Efficiency and effectiveness of employees <ul style="list-style-type: none"> ▲ Are held accountable ▼ Get things done as quickly as possible ▲ See thing from my perspective ● Are reliable ▼ Focus on addressing customer needs ● Do what they promise ■ Are proactive in helping ■ Provide good value services 	Communication <ul style="list-style-type: none"> ■ Explain intended actions clearly ■ Communicate well ■ Are consistent
	Simplicity and efficiency of processes <ul style="list-style-type: none"> ■ Processes are designed to reduce wait times ▲ Service feels seamless even if I have to communicate across different channels ▲ I can get to the right person the first time ▼ Processes are easy to understand 		Employee autonomy <ul style="list-style-type: none"> ■ Employees are empowered to make decisions
	Privacy <ul style="list-style-type: none"> ■ Safeguard privacy and confidentiality 	Transparency <ul style="list-style-type: none"> ■ Encourage public participation in decision making ■ Demonstrate openness and transparency in decision making 	Access <ul style="list-style-type: none"> ■ Is making it easier to access information about their service ■ Is making best use of online services to improve convenience and efficiency for customers
Goals			
	Service quality <ul style="list-style-type: none"> ■ Provides good service ■ Operates with integrity ■ Is a body that I can trust 	Accountability <ul style="list-style-type: none"> ■ Is accountable for its services 	

Legend: ▲ Increase in ranking within the same group since 2015 (based on factor loading)
 ■ No change in ranking
 ▼ Decrease in ranking within the same group since 2015 ((based on factor loading)
 ● Aligned to a new group in 2016

Employee attributes Goals Processes

Importance of Drivers in Determining Overall Customer Satisfaction

Communication, efficiency and effectiveness of employees, honesty and integrity of employees, and access 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 each driver.

Analysis of the drivers on overall satisfaction with NSW Government services reveals efficiency and effectiveness of employees, honesty and integrity of employee, communication, and access (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 2.6). Employee autonomy is of lowest importance for both consumers and businesses in explaining overall satisfaction.

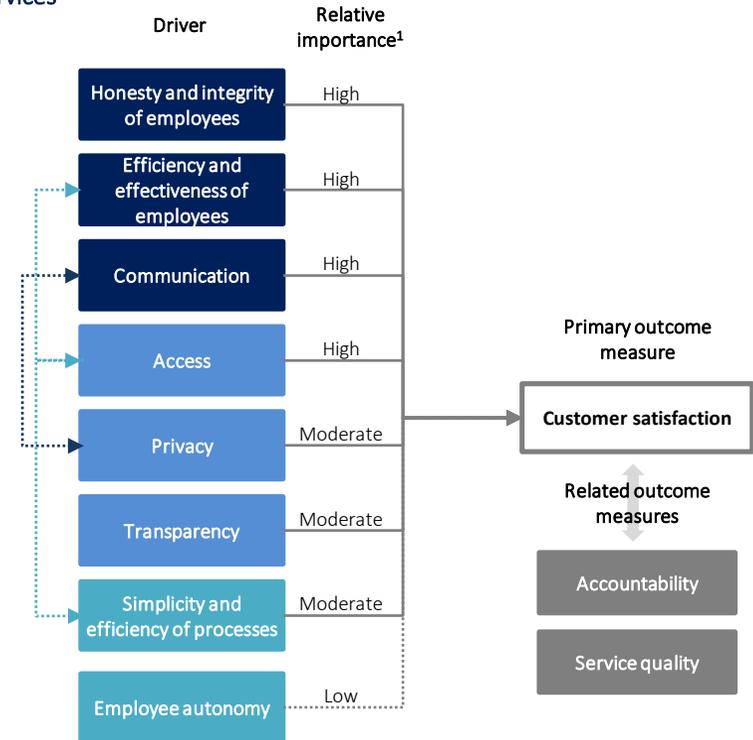
Further analysis reveals that customers views of the honesty and integrity of employees is strongly linked to privacy (i.e. customers who rate NSW Government services higher on privacy also rate NSW Government services higher on attributes captured within the honesty and integrity of employees).

Customers views on the efficiency and effectiveness of employees is also highly related to their views on access, 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 0.95) indicating that results against the drivers of overall satisfaction are representative of the importance of drivers for the Customer Satisfaction Index.

To ensure consistency and comparability the survey collection and analysis have been performed using the same approach as 2015.

Figure 2.6: Impact of drivers on overall satisfaction with NSW Government Services



¹Note: 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 of the Drivers of Customer Satisfaction

Customers have the highest average satisfaction with the drivers honesty and integrity of employees, communication, privacy and efficiency and effectiveness of employees and lowest for transparency.

Of the eight satisfaction drivers, customers perceive NSW Government services perform most positively on honesty and integrity of employees (average score of 7.6), consistent with 2015.

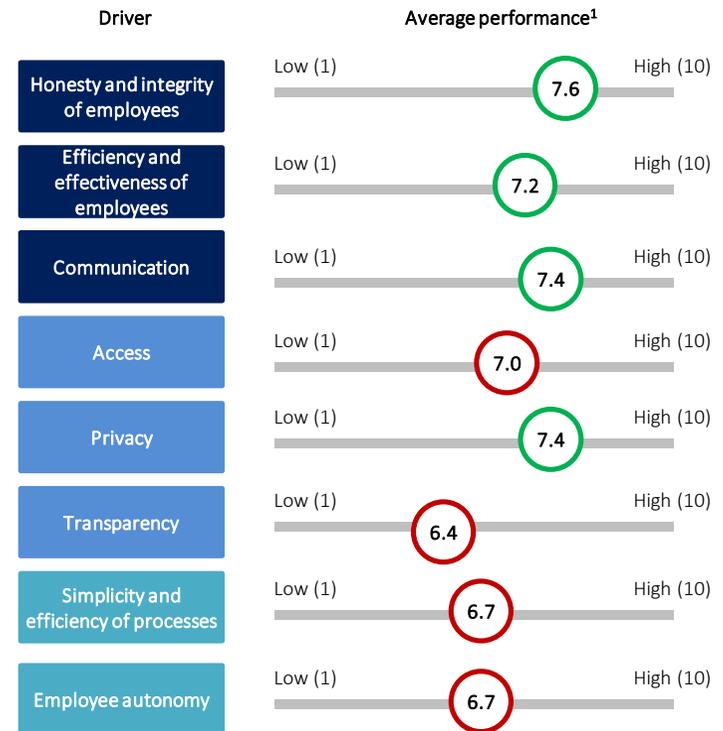
In addition to honesty and integrity of employees, average performance is also the highest for the following drivers:

- Communication (average score of 7.4) comprising of 'deliver high safety standards', 'provide services without bias', 'are honest' and 'engender confidence in their knowledge'.
- Privacy (average score of 7.4) which is 'safeguard privacy and confidentially'.
- Efficiency and effectiveness of employees (average score of 7.2) comprising of 'are held accountable', 'get things done as quickly as possible', 'see things from my perspective', 'are reliable', 'focus on addressing customer needs', 'do what they promise', 'are proactive in helping', and 'provide good value services'.

Average performance is lowest for the transparency driver (average score of 6.4), consistent with 2015.

Refer to Figure 2.7 for all driver satisfaction scores.

Figure 2.7 Average performance against each of the drivers



 Score is higher than average across all drivers

 Score is lower than average across all drivers

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

Performance of the Drivers of Satisfaction

Consistent with the findings from 2015, 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.

All of the drivers of satisfaction have seen an increase in performance compared to 2015, leading to an overall increase in satisfaction. Similarly, the importance of the drivers of satisfaction related to the employee related attributes have seen an increase compared to 2015.

Consistent with 2015, 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 comparatively lower.

Transparency 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.

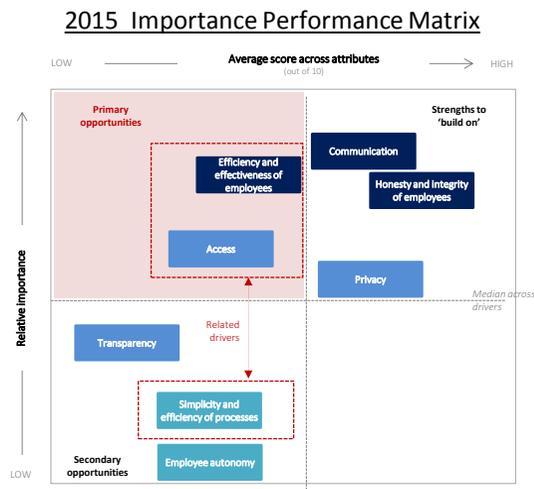
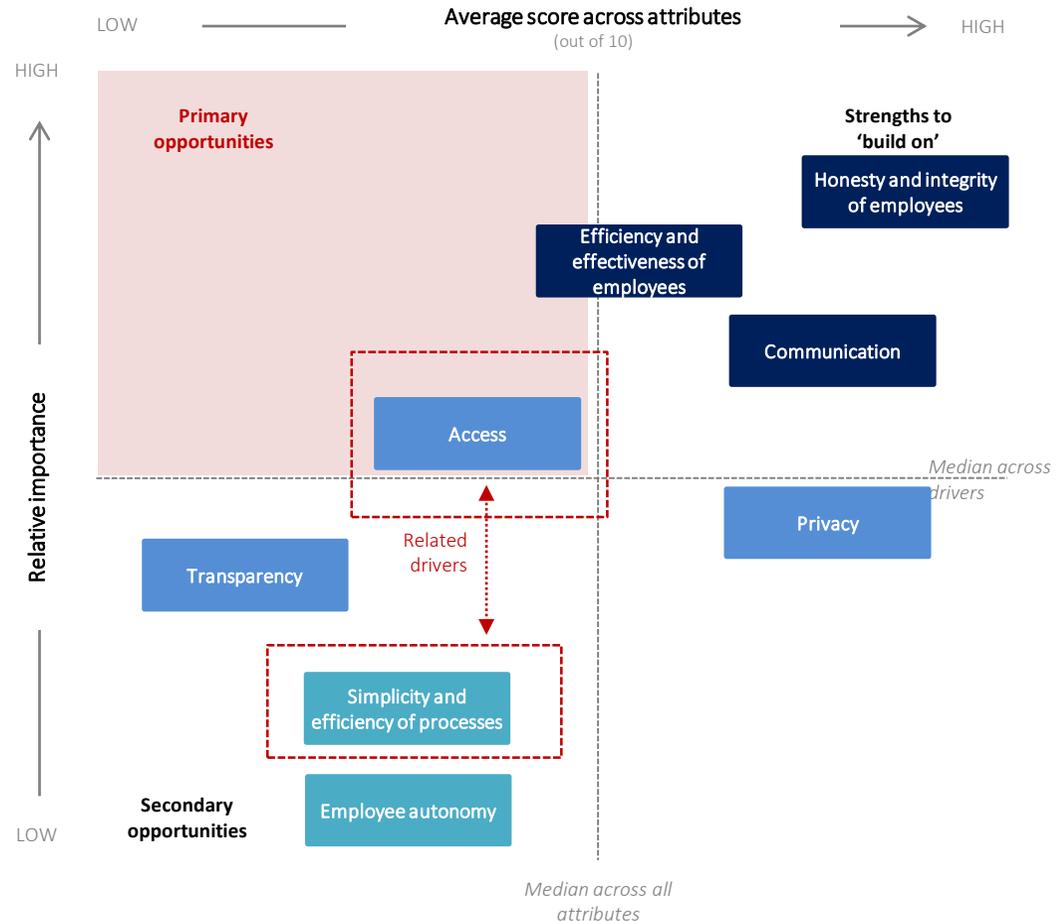


Figure 2.8: Importance versus performance against each of the drivers of satisfaction 2016



Note: Analysis displayed is based on customer data however similar results are observed for businesses.

¹Note: 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, 3, 4 & 5*

2. Performance against customer satisfaction drivers - *Key Findings 6, 7 & 8*

3. Complaints handling - *Key Finding 9*

4. Perceptions of online services - *Key Findings 10, 11, 12, 13 & 14*

5. Variation in service contact method across services – *Key Finding 15*

6. Comparison of performance to other jurisdictions – *Key Findings 16 & 17*

Complaints Handling

Areas covered in this section

1. Customer Views on the Complaints Experience Delivered by NSW Government Services...p. 60
2. Impact of Complaints Experiences on Customer Satisfaction with NSW Government Services...p. 61

Summary Findings:

- Customers' complaints experiences 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.
- Less than half of customers who made a complaint to a NSW Government service thought their complaint was handled well.

Key Findings Covered in this Section:

Key Finding 9: While complaints handling has an identifiable impact on customer satisfaction, there has been a significant increase in average satisfaction of customers who have complained.

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 in the last 12 months as a supporting indicator of customer satisfaction with service delivery.

27% of consumers and 36% of businesses identified they had made a complaint to a NSW Government service in the last 12 months and an additional 58% of consumers and 52% of businesses had made a complaint more than 12 months ago.

Of those who had made a complaint, only 38% of consumers and 44% of businesses identified that their most recent complaint was handled well (7 to 10 out of 10) with 35% of consumers and 25% of businesses identified their most recent complaint was handled poorly (1 to 4 out of 10). Refer to Figure 3.1 for further detail.

These results are slightly lower than 2015, where consumers indicated that 42% of the respondents had complaints handled well, and 44% of businesses. While the average score of consumer complaints decreased, business respondents indicated a higher average score.

Furthermore, of those who had made a complaint 49% of consumers and 56% of businesses identified that making their most recent complaint was easy (7 to 10 out of 10) with 26% of consumers and 19% of businesses identified it was difficult (1 to 4 out of 10). Refer to Figure 3.2 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 0.61 for consumers and 0.71 for businesses) suggesting that the ease of making a complaint is a contributing factor to perceptions of how well the complaint was handled.

Figure 3.1: 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

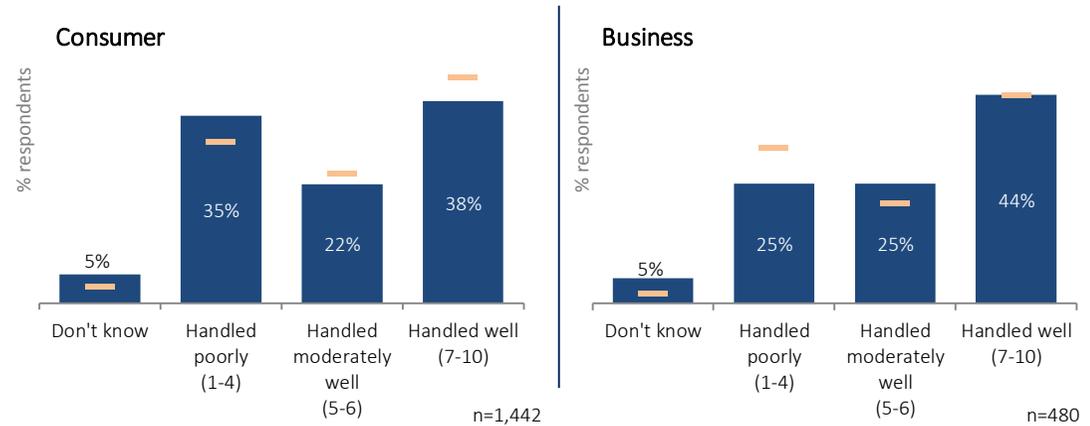
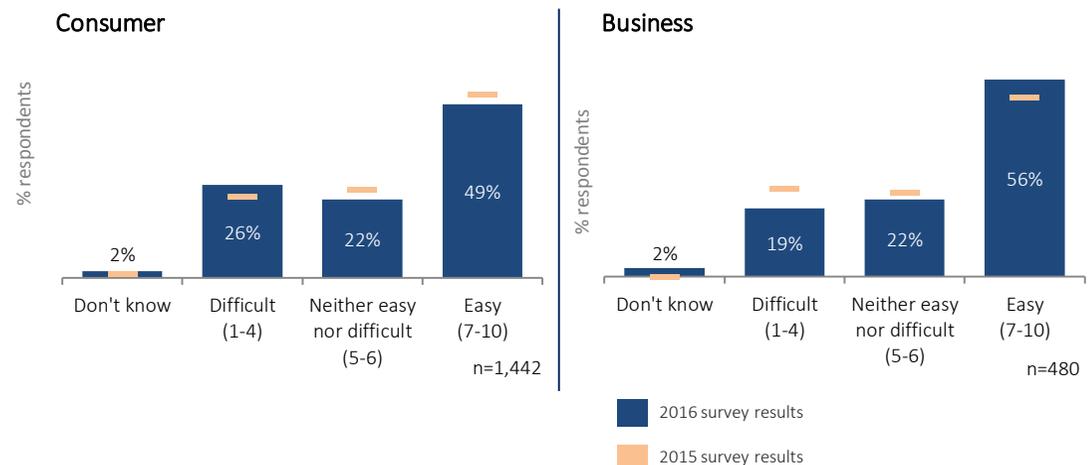


Figure 3.2: Customer perceptions of how easy was it to make a complaint

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 consumers who have made a complaint to a NSW Government service in the last 12 months compared to average satisfaction (average satisfaction of 7.3 for consumers compared to overall average of 7.5).

Customers who have made a complaint are significantly more likely to score NSW Government services lower against the attributes ‘see things from my perspective’, ‘are held accountable’ and ‘get things done as quickly as possible’ suggesting complaints management processes may be important contributing factors to the priority satisfaction driver of 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 7.9 for consumers and 8.0 for businesses compared to 7.5 average satisfaction overall for both consumers and businesses. Refer to Figure 3.3). Customers who had their complaint handled well also rate NSW Government services employees significantly higher in honesty and delivering high safety standards (average score of 8.3 for consumers and 8.2 for businesses).

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 7.6 for consumers and 7.8 for businesses compared to an overall average of 7.5 for both consumers and businesses. Refer to Figure 3.4). These results, although not a significant improvement since 2015, show an increase year on year in average scores.

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.

- Legend:**
- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 - No significant change in avg. from 2015 (at 99% level of Confidence)
 - ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Figure 3.3: 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

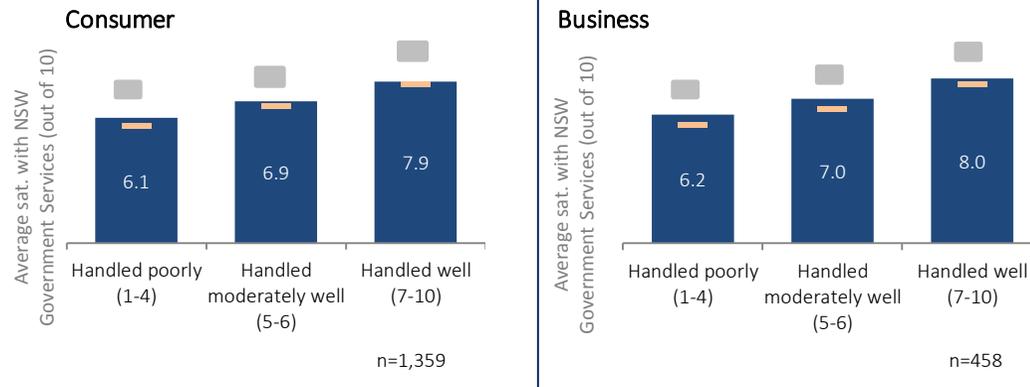
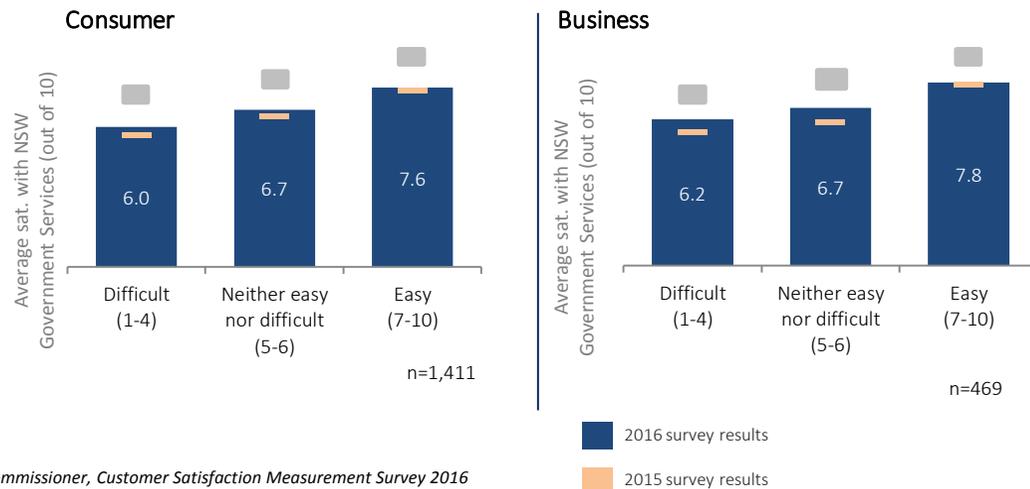


Figure 3.4: Impact of ease of making a complaint on satisfaction with NSW Government services

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, 3, 4 & 5*

2. Performance against customer satisfaction drivers - *Key Findings 6, 7 & 8*

3. Complaints handling - *Key Finding 9*

4. Perceptions of online services - *Key Findings 10, 11, 12, 13 & 14*

5. Variation in service contact method across services – *Key Finding 15*

6. Comparison of performance to other jurisdictions – *Key Findings 16 & 17*

Perception of Online Services

Areas covered in this section

1. Current and Preferred Service Contact Method for Accessing Government Services.....p. 64
2. Customers' Views on NSW Government Online Services.....p. 67
3. Customer Identified Drivers of Digital Adoption.....p. 70

Summary Findings

- Face to face is the most commonly used and preferred contact method to access NSW Government services overall by customers, followed by online.
- Online services were perceived to deliver a more positive experience than other contact methods with higher than average customer satisfaction, linked to shorter wait times and simpler processes.
- Customers primarily carry out direct dealings with NSW Government services during business hours via telephone and face to face.
- Customers are positive about their experiences interacting with services online, however the sufficiency of content and ease of navigation are areas of lower satisfaction.
- **For those customers who used an online channel, the majority chose to do so.** This choice corresponds to a higher overall satisfaction with the online experience (8.1 out of 10 for both consumers and businesses) compared to those customers who had no option.
- Few customers have used a smartphone to carry out dealings with NSW Government services, but since 2015, smartphones and tablets are increasingly used to access online services.

Key Findings Covered in this Section:

Key Finding 10: Customers' needs for improved access and simplicity and efficiency in processes can be enhanced through online services which are delivering positive experiences

Key Finding 11: Consumers were more satisfied with the overall online experience with NSW Services compared to 2015, whilst satisfaction with online services among businesses remain largely flat

Key Finding 12: Customers who exercise a choice to go online have a higher average satisfaction with online services than those who are directed/prompted or have no choice

Key Finding 13: A majority of customers use laptop computers to access online content, and satisfaction is highest for consumers using a tablet and businesses using a laptop

Key Finding 14: Improvements to navigation, security and accessibility are most likely to increase usage of online services by customers

Current and Preferred Service Contact Method for Accessing Government Services

Face to face is the most commonly used and preferred contact method to access NSW Government services by customers, followed by online.

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

Across contact methods, face to face is still the most commonly used contact method (59% of consumers, 47% of businesses). Face to face is also the most commonly preferred contact method (32% for consumers and 27% of businesses), however, this is a significant decrease in preference since last year (-7% for consumers, -11% for businesses). Email has undergone the most significant year-on-year growth as the preferred contact method (+5% for consumers, +10% of businesses).

For consumers, online is the second most commonly used contact method after face to face for their dealings with NSW Government services (59% have interacted with a service face to face and 32% online). Online is also the second most commonly preferred contact method for these dealings (32% prefer face to face followed by 25% who prefer online).

For businesses, online is the third most common contact method through which they have direct dealings with NSW Government services, behind face to face and telephone (47% face-to-face, 43% telephone, 31% online). However, online is the second most commonly preferred contact method for their interactions with NSW Government services (27% prefer face to face followed by 23% who prefer online).

- Legend:
- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
 - No significant change in avg. from 2015 (at 99% level of Confidence)
 - ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Figure 4.1: Current contact methods used when dealing with NSW Government services

Customers were asked “Customers are 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?” (Response is multi-select).

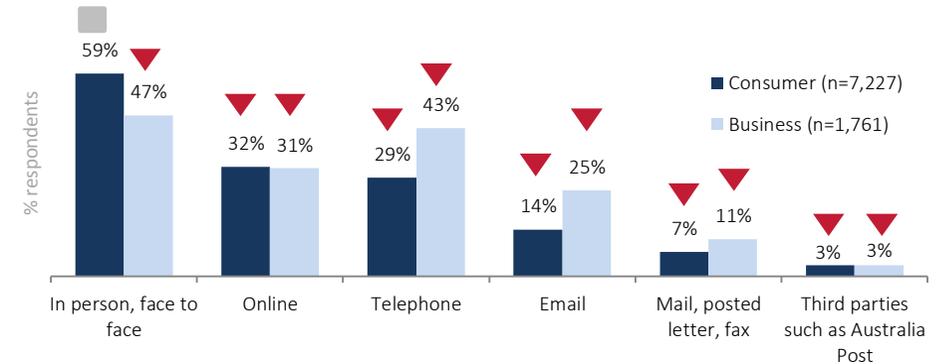
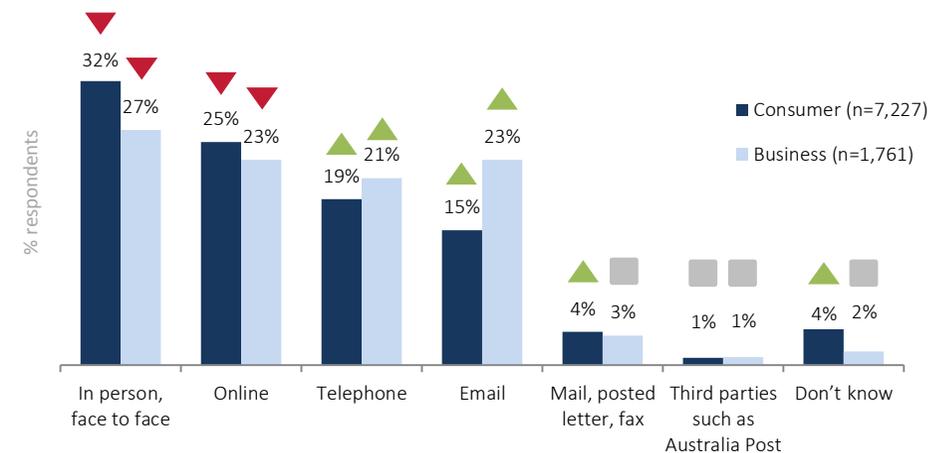


Figure 4.2: Preferred contact method for dealing with NSW Government services

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 Contact Method

Online services were perceived to deliver a more positive experience than other contact methods 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 (average satisfaction of 7.7 for consumers and 7.7 for businesses) compared to overall average satisfaction (7.5 for consumers and 7.5 for businesses, refer to Figure 4.3).

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 6.8 for online users compared to between 6.4 and 6.6 for other contact methods) and ‘processes are easy to understand’ (average score of 7.2 for online users compared to between 6.7 and 7.1 for other contact methods). Refer to Figure 4.4 for further detail. These results are consistent with 2015.

Since last year, satisfaction by contact method has increased – this increase is statistically significant for consumers online, face to face, using third parties and email, and businesses using face to face and third parties. Even so, businesses using third parties were least satisfied with NSW Government services (6.8 out of 10).

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.

“With the new online services for [the department], it’s much easier to take care of the routine tasks, and it’s getting better at some of the more complex transactions too.”
- Business customer

“The website had wrong, outdated and very confusing or conflicting information – however when I called I had the best service.”
- Business customer

Legend: ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
■ No significant change in avg. from 2015 (at 99% level of Confidence)
▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Figure 4.3: Variation in overall satisfaction by contact method

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

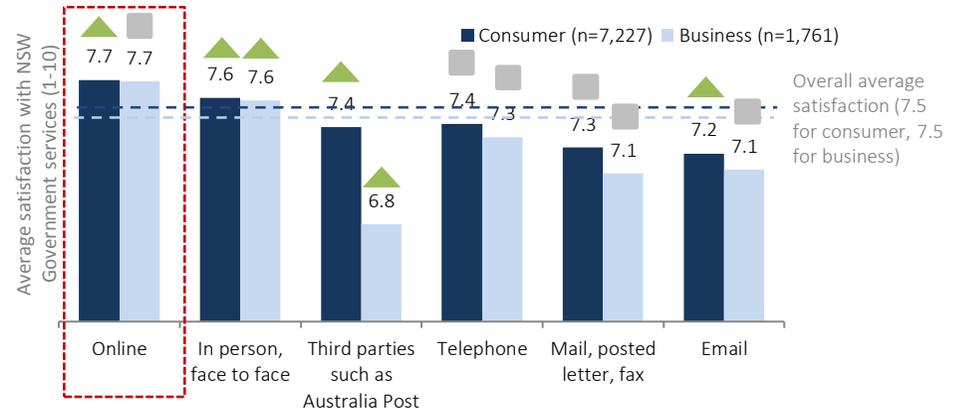
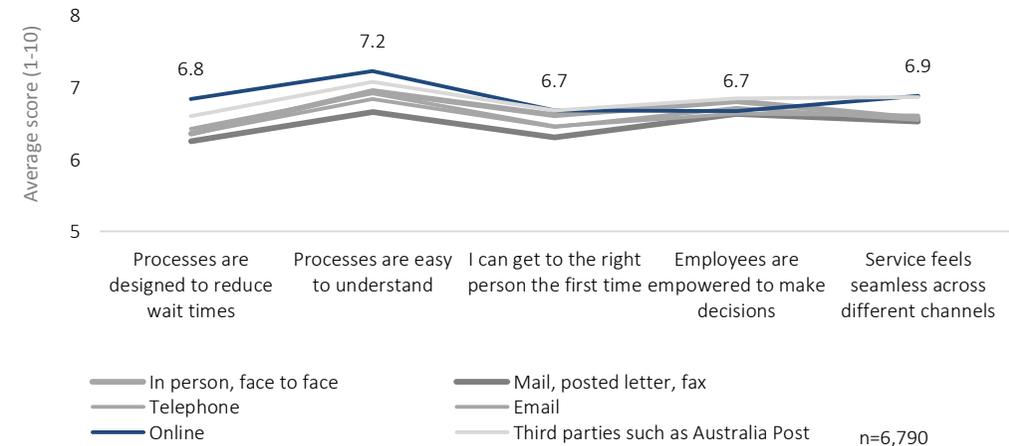


Figure 4.4: Perceptions of processes by contact method(s) used to access services (consumers)



Time of Day by Direct Dealing Took Place by Contact Method Used

Customers primarily carry out direct dealings with NSW Government services during business hours via telephone and face to face.

Customers were asked at what time of day did they carry out their direct dealing with NSW Government services by contact method used.

The survey suggests that consumers are most likely to carry out their direct dealings with NSW Government services during business hours on a weekday with telephone and face to face being more likely to be used during business hours (83% of consumers, and 90% of businesses for telephone; 82% of consumers, and 89% of businesses for face to face).

Online contact methods enable customers to engage in direct dealings outside of business hours. Nearly half of consumers use online outside of business hours on a weekday (47%), with a quarter using online on a weekend (28%). Amongst businesses dealing with NSW Government services, online is used less frequently (by 38% of businesses outside of business hours on a weekday, and by 16% on weekends).

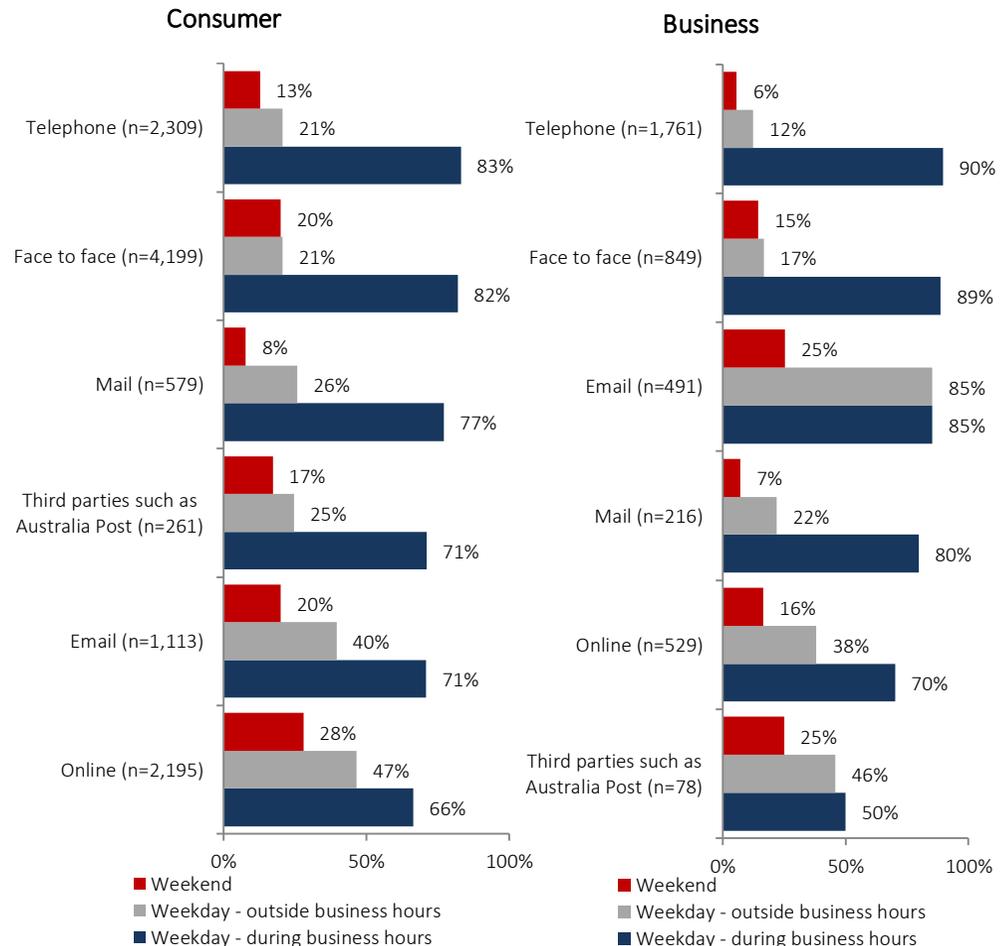
Email is the most common contact method used by businesses when dealing with NSW Government services outside of business hours (85% of businesses) compared with telephone, which is used by just 12% of businesses outside of business hours. For more information, refer to Figure 4.5.

“ They called me back and took the time to talk me through my questions. It was pretty amazing. ”
- Business customer

“ It's very complex to get the right information, quickly. Regardless of whether you're in-person or using the internet; and people often gave different answers to the same question depending on who you talk to ”
- Business customer

Figure 4.5: Time of day of direct dealing by contact method used (multi-select)

Customers were asked “At what time of day do you carry out your direct dealing with...?”





Customers' Views of 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 lower satisfaction.

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 contact method to complete their task and their satisfaction with several aspects of their online experience.

Average satisfaction with the overall experience of using the online service to complete their task is 8.0 for consumers and 7.8 for businesses. Consumer satisfaction with the online experience has increased since 2015.

Consumers are most satisfied by the currency and accuracy of content, information is being handled securely, and that the format of content met access requirements.

Businesses are also satisfied (7.8 out of 10) with their experiences interacting with NSW Government services online.

Satisfaction is higher for attributes relating to secure handling of information and currency and accuracy of content, and lower for sufficient provision of content and simplicity of websites/apps.

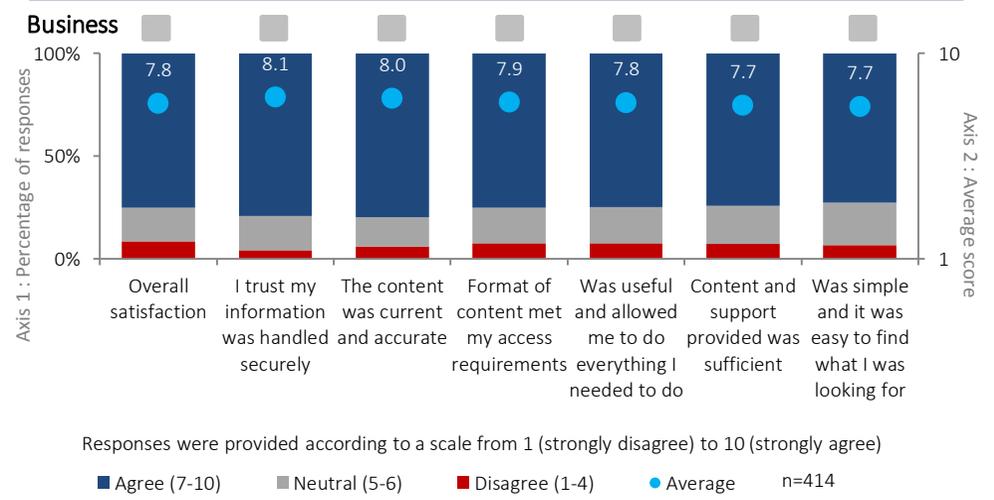
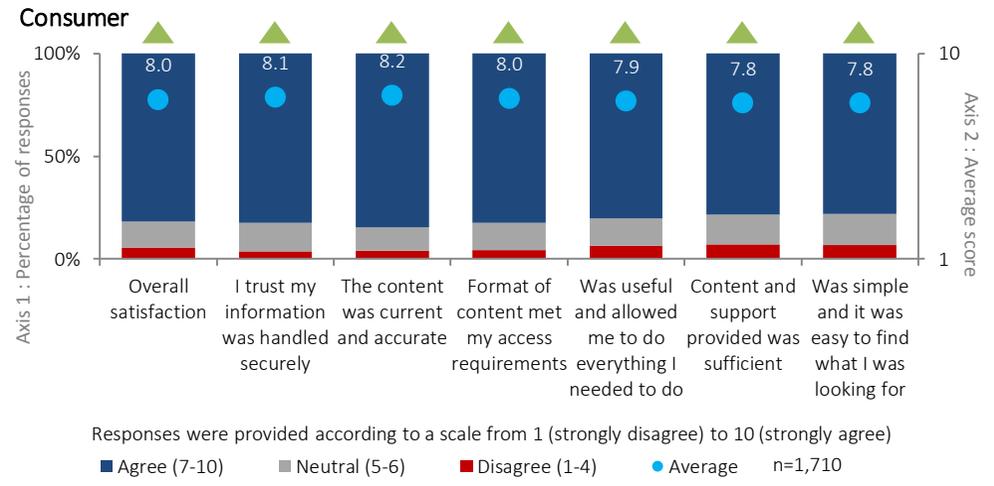
“ A lot of the sites are very good. I found the initial contact clear and quite detailed, when looking for basic information ”
- Consumer

“ I would like to see more of an online based presence – requesting email bills, checking payments and online chats for questions. They allow you to work flexibly, multi-tasking. In the end chats will become more AI based anyway, so it will be faster and easier in the future too. ”
- Consumer

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)

Figure 4.6: 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?”



Customer Choice to Use Online Services

For those customers who used an online channel, the majority chose to do so. This choice corresponds with a higher overall satisfaction with the online experience (8.1 out of 10 for both consumers and businesses) compared to those customers who had no option.

Of those customers that use online, a significant proportion of customers chose to go online (84% of consumers, 85% of businesses) as opposed to being directed/prompted to go online (13% of consumers, 12% of businesses), or facing no other option (3% of consumers, 4% of businesses).

Customers who chose to go online were more satisfied with the overall experience of using the website/app to complete the task (average satisfaction of 8.1 out of 10 for consumers, and 8.1 out of 10 for businesses) than those who faced no other option (average satisfaction of 7.3 out of 10 for consumers, and 6.5 out of 10 for businesses).

For consumers, 84% of respondents who chose to go online “strongly agree” that they were “satisfied with the overall experience of using the website/app to complete the task”, compared with 80% of businesses.

For those customers who felt there was no other option available but to go online, 13% of consumers “strongly disagree” that they were “satisfied with the overall experience of using the website/app to complete the task”, compared with 12% of businesses.

Figure 4.7 provides further detail on the choice to go online, and Figure 4.8 provides further detail about how this choice relates to satisfaction with website/app experience.

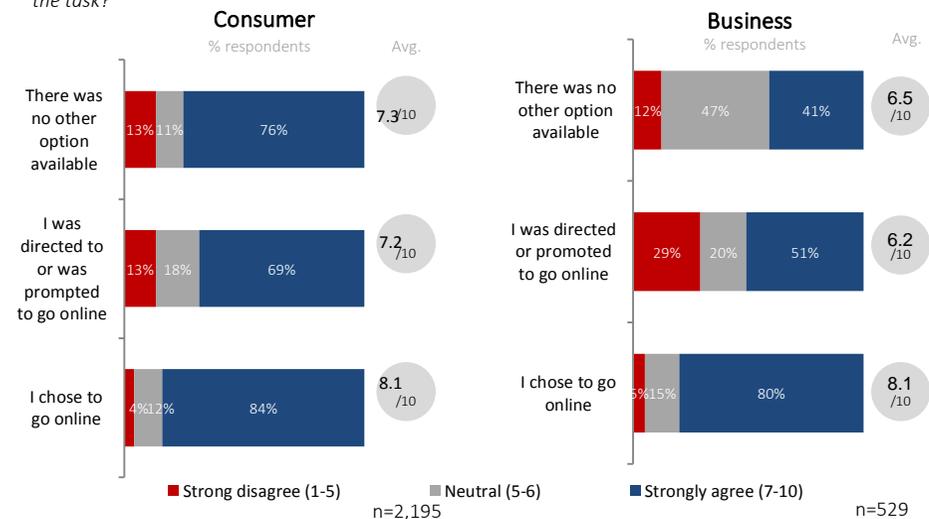
Figure 4.7: Choice to go online

Customers were asked “Did you choose to go online or were you directed to go online?”



Figure 4.8: Satisfaction with using website/app by choice to go online

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



Devices Used by Customers to Access Online Services

Few customers have used a smartphone to carry out dealings with NSW Government services, but since 2015, smartphones and tablets are increasingly used to access online services.

When dealing with NSW Government services online, customers more commonly access content from a laptop computer (51% of consumers and 51% of businesses) or desktop computer (43% of consumers and 49% of businesses).

Fewer customers have used a smartphone or tablet to carry out direct dealings with NSW Government services (refer to Figure 4.9). Year on year however, the proportion of customers using laptop computers and desktop computers to access online services has decreased, and the proportion using smartphones and tablets have increased.

Overall satisfaction with using online services to complete the task appears consistent across devices used (refer to Figure 4.10). An outlier being businesses using a tablet to access online services with an average satisfaction of 6.9 out of 10. Across devices, satisfaction with online services has improved, driven by overall increases in average satisfaction.

The number of devices used by customers to deal with NSW Government services online has remained relatively stable year on year (1.41 in 2016 compared with 1.42 in 2015 for consumers, and 1.39 in 2016 compared with 1.43 in 2015).

Figure 4.9: Devices used for dealings with NSW Government services online (multi-select)

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

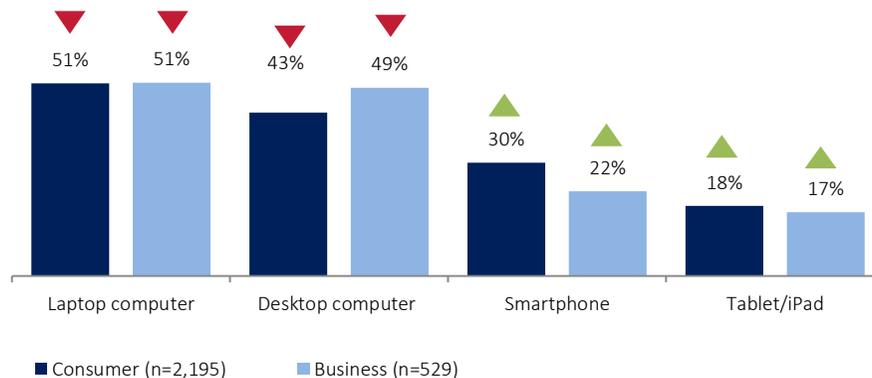
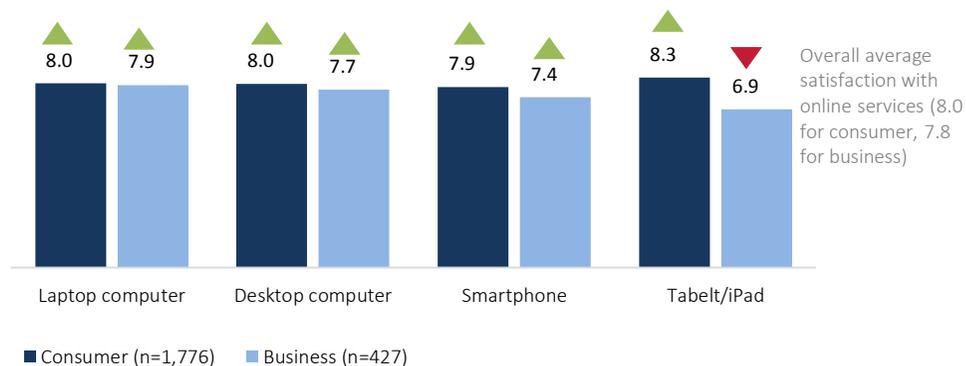


Figure 4.10: Satisfaction with online services by device used

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



Legend:

- ▲ Statistically significant increase in avg. from 2015 (at 99% level of Confidence)
- No significant change in avg. from 2015 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2015 (at 99% level of Confidence)



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 contact methods.

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.

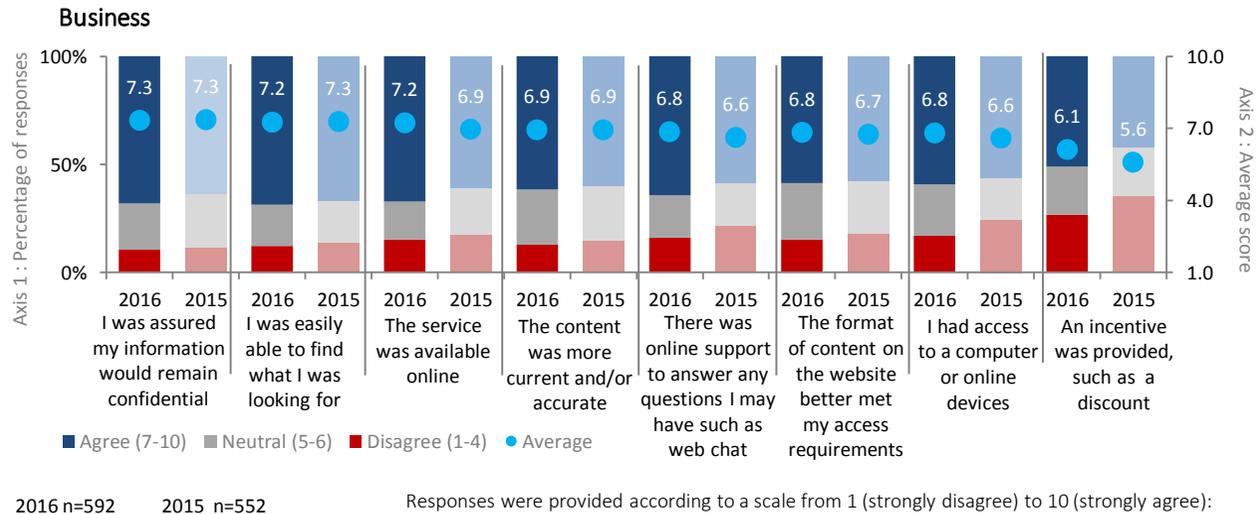
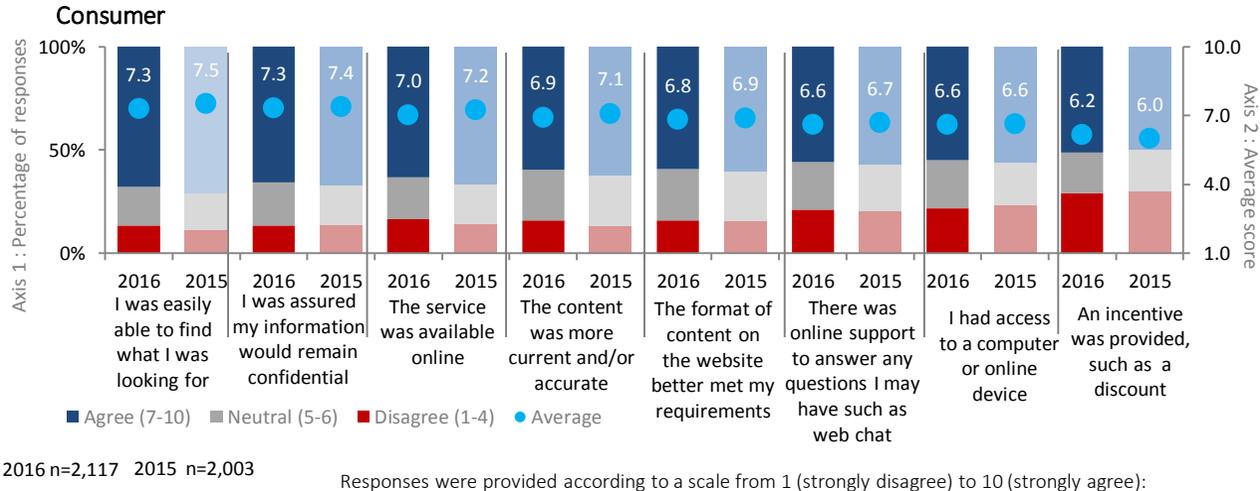
Consistent with 2015, customers who currently use other contact methods would be more likely to go online if navigation and confidentiality of information were improved; incentives are least likely to increase adoption overall.

For consumers who have not gone online there has been a statistically significant decrease from 2015 for agreeing with the statement 'I would go online if... I was easily able to find what I was looking for', which is being driven by an overall improvement in website/app performance across NSW Government Services.

For businesses who have not gone online to interact with NSW Government services, there is a statistically significant increase in the number of respondents agreeing with the statement 'I would go online if... An incentive was provided, such as a discount' from 2015

Figure 4.11: 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...."



“ I was really surprised, I wasn't expecting to hear from them for weeks, but I heard back in about a day. I almost missed it! No complaints, pretty easy. ”
- Consumer

“ If the NSW Government did something similar to the MyGov system, it would make things a lot easier. That's a great system. ”
- Consumer

Detailed Findings

1. Overall performance - *Key Findings 1, 2, 3, 4 & 5*

2. Performance against customer satisfaction drivers - *Key Findings 6, 7 & 8*

3. Complaints handling - *Key Finding 9*

4. Perceptions of online services - *Key Findings 10, 11, 12, 13 & 14*

5. Variation in service contact method across services – *Key Finding 15*

6. Comparison of performance to other jurisdictions – *Key Findings 16 & 17*

Variation in Service Contact Method Across Services

Areas covered in this section

1. Variation in Service Contact Method Use and Preference Across Services.....p. 73

Summary Findings:

- 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
- Face to face remains the most commonly and preferred contact method to interact with NSW Government services for both consumers and businesses, followed by online channel.
- Customers indicated that online is the increasingly preferred communication method, this is leading currently used communication method, providing opportunity for services to increase their online capabilities.
- Almost a quarter of customers have indicated that they interact with NSW Government services at least once per week, the others have less frequent dealings.

Key Findings Covered in this Section:

Key Finding 15: Face to face remains the most commonly used and preferred contact method to interact with NSW Government services for customers

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 35).

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 such as Public Schools, Police, Public Transport, Car and Boat Registration and Emergency Services.

Access (which includes access to information and making best use of online services) is a more important driver of satisfaction for services like Services for Older People, Consumer Affairs, Child Protection, Documentation Services and Art Galleries and Museums.

Transparency in decision making is a more important driver of satisfaction for Child Protection and Major Roads.

Simplicity and efficiency of processes and employee autonomy are less important drivers for most of the services.

The relative importance of drivers are not comparable to prior year as the grouping of attributes within each driver has slightly changed.

Figure 5.1: Variation in importance of satisfaction drivers by services

	Efficiency and effectiveness of employees	Communication	Honesty and integrity of employees	Access	Privacy	Transparency	Simplicity and efficiency of processes	Employee autonomy
Major Roads (n=189)	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Fire Brigade (n=67)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Highly important	Moderately important
Public Transport (n=623)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Water Supply (n=236)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Environ. Protection (n=52)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Registration (n=471)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Services for Older People (n=543)	Highly important	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important
Disability Serv. (n=135)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Public Hospitals (n=512)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Consumer Affairs (n=112)	Highly important	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important
Courts (n=144)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Highly important	Moderately important
Police (n=252)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Public Housing (n=96)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Child Protection (n=59)	Highly important	Highly important	Highly important	Highly important	Highly important	Highly important	Moderately important	Moderately important
Document. Services (n=61)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Public Schools (n=376)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Art Galleries (n=110)	Highly important	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important
Emergency Services (n=67)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
Prison (n=35)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important
TAFE Services (n=225)	Highly important	Highly important	Highly important	Moderately important	Moderately important	Moderately important	Moderately important	Moderately important

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=23) and Agricultural Advice (n=18)

Contact Methods Used by Consumers to Interact with NSW Government Services

For consumers, face to face is the most commonly used contact method to interact with NSW Government services followed by online. Online is most prevalent among consumers dealing with Car and Boat Registration, Business Advisory Services and Public Transport.

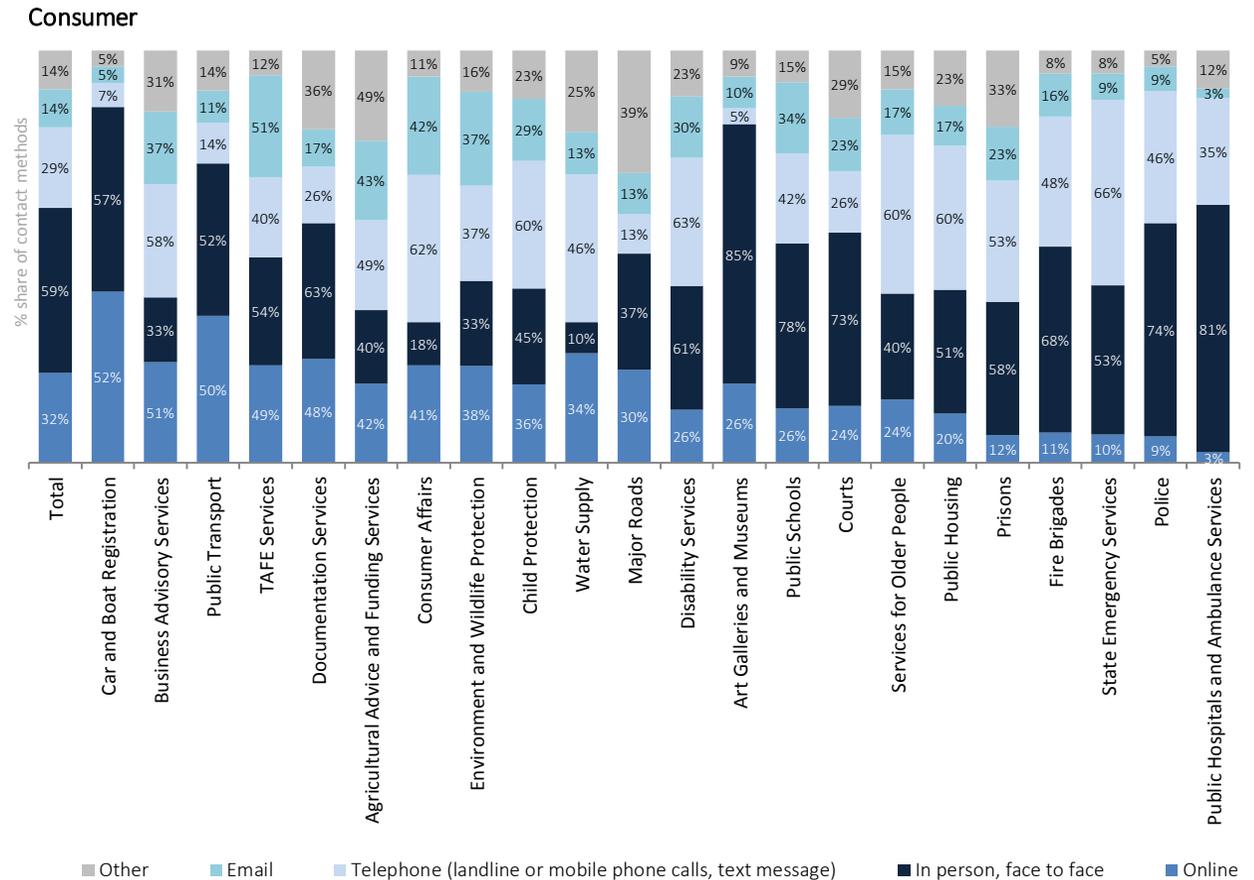
Customers were asked about the contact methods used when they have had direct dealings with NSW Government services in the last 12 months.

Across contact methods, face to face is still the most commonly used contact method (59% of consumers), followed by online (32% for consumers) and telephone (29% for consumers).

Across services, face to face is most likely to be used among consumers for dealings with Art Galleries and Museums (85%), Public Hospitals and Ambulance Services (81%), and Public Schools (78%). Whereas, online channel is most prevalent among consumers dealing with Car and Boat Registration (52%), Business Advisory Services (51%) and Public Transport (50%). Refer to Figure 5.2 for further information.

Figure 5.2: Breakdown of contact methods across services among consumers¹

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? ”



Note: 1) Each respondent could select any number of contact methods

Contact Methods Used by Businesses to Interact with NSW Government Services

For businesses, face to face is the most commonly used contact method to interact with NSW Government services followed by telephone and online. Online is most prevalent among businesses dealing with Car and Boat Registration, Child Protection and Water Supply.

Customers were asked about the contact methods used when they have had direct dealings with NSW Government services in the last 12 months.

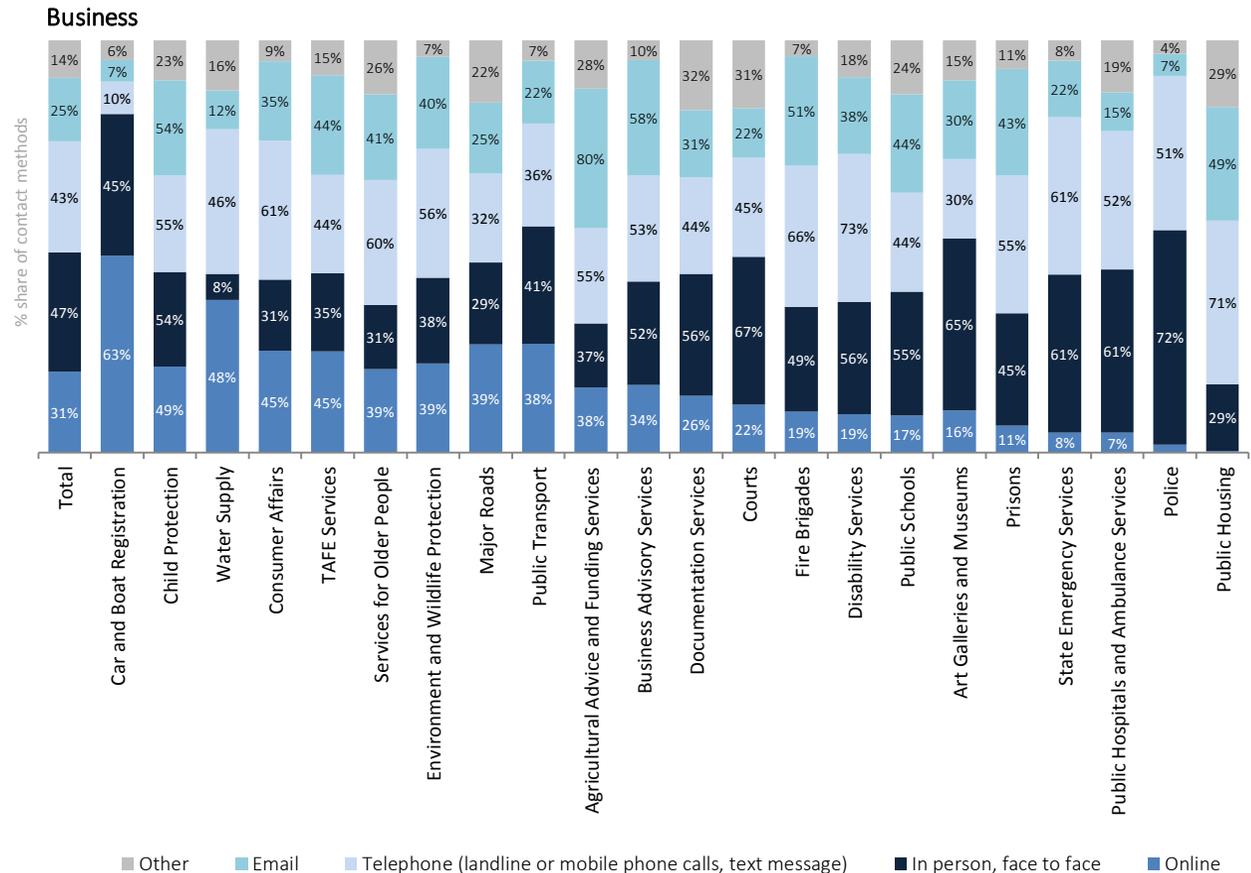
Across contact methods, face to face is still the most commonly used contact method (47% of businesses), followed by telephone (43% for businesses) and online (31% for businesses).

Across services, face to face is most likely to be used among businesses for dealings with Police (72%), Courts (67%), and Art Galleries and Museums (65%). Telephone as the second most commonly used channel among businesses, it is being predominantly used when dealing with Public Housing (71%), Fire Brigades (66%), and Consumer Affairs (61%).

From an online channel perspective, it was mainly being used by businesses dealing with Car and Boat Registration (63%), Child Protection (49%) and Water Supply (48%). Refer to Figure 5.3 for further information.

Figure 5.3: Breakdown of contact methods across services among businesses¹

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? "



Note: 1) Each respondent could select any number of contact methods

Contact Methods Preferred by Consumers to Interact with NSW Government Services

For consumers, face to face is the most commonly preferred contact method to interact with NSW Government services followed by online. Online is most preferred among consumers dealing with Car and Boat Registration, Public Transport and Documentation Services.

Customers were asked about their preferred contact methods for dealing with NSW Government services in the future.

For consumers, online is the second most preferred contact method after face to face for their dealings with NSW Government services (32% prefer face to face followed by 25% who prefer online).

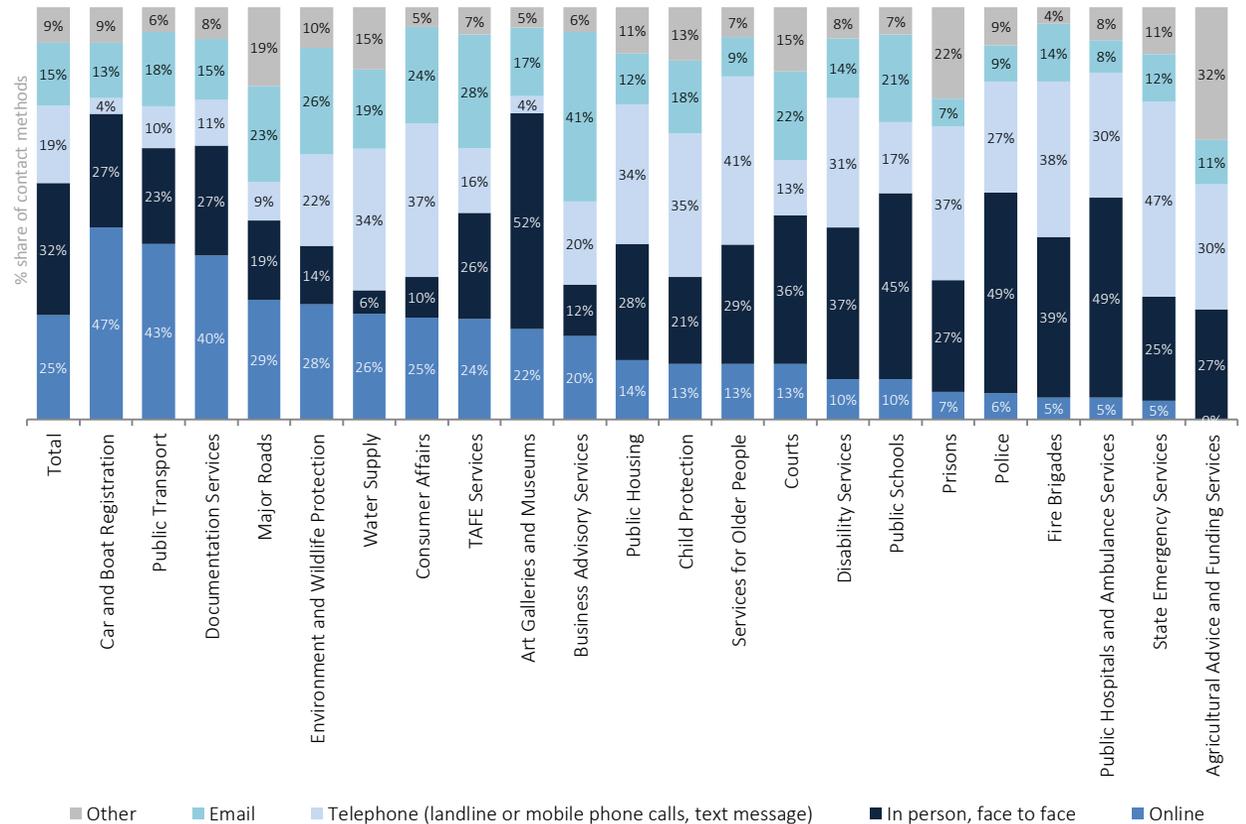
Across services, online channel is mostly preferred by consumers dealing with Car and Boat Registration (47%), Public Transport (43%) and Documentation Services (40%). There was a gap between preference and usage for some services, for example there was only one in five consumers (20%) prefer dealing with Business Advisory Services via online, yet half of the consumers who have dealt with Business Advisory Services were doing so through online channel (51% of consumers used online to contact Business Advisory Services).

Face to face channel is most preferred by consumers dealing with Art Galleries and Museums (52%), Public Hospitals and Ambulance Services (49%) and Police (49%). Refer to Figure 5.4 for further information.

Figure 5.4: Breakdown of preferred contact methods across services among consumers

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

Consumer



Contact Methods Preferred by Businesses to Interact with NSW Government Services

For businesses, face to face is the most commonly preferred contact method to interact with NSW Government services followed by email and then online. Online is most preferred among businesses dealing with Water supply, Car and Boat Registration and Documentation Services.

Customers were asked about their preferred contact methods for dealing with NSW Government services in the future.

For businesses, the level of preference across various contact methods was relatively similar with face to face being the most preferred channel (27% for business), followed by online and email (both have 23% for businesses), and telephone (21% for businesses).

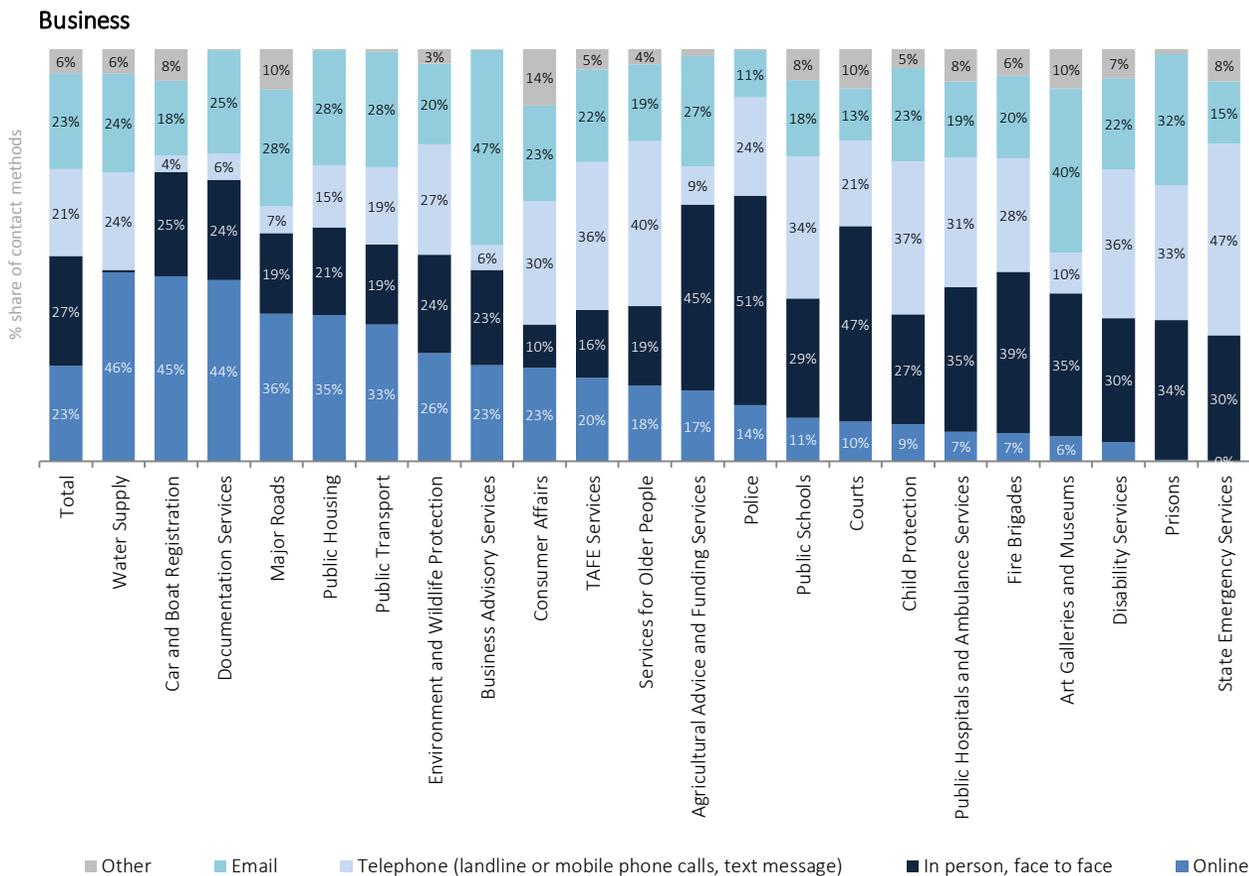
Online is most preferred among businesses dealing with Water Supply (46%), Car and Boat Registration (45%) and Documentation Services (44%). There was a big gap between preference and usage for online channel with Child Protection services (9% of businesses prefer online but 49% have used online in last 12 months).

Similar to usage, the preference of face to face for dealings with Police was high (51% of businesses prefer face to face when dealing with Police and 72% were using it). This is also true for dealings with Courts (47% of businesses prefer face to face when dealing with Courts and 67% were using it).

Email is most preferred when dealing with Business Advisory Services (47%), Art Galleries and Museums (40%), and Prisons (32%). Refer to Figure 5.5 for further information.

Figure 5.5: Breakdown of preferred contact methods across services among businesses

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



Nature of Direct Dealings

Almost a quarter of customers have indicated that they interact with NSW Government services at least once per week, the others have less frequent dealings.

Customers were asked about the frequency and duration of their Direct Dealings with NSW Government services.

Two-third of customers have indicated that typically they interact with a NSW Government service once every 3 months, or less (67% of customers have direct dealing every three months or less often). For those who have more frequent dealings, 23% of customers have a direct dealing once a week or more. Refer to Figure 5.6 for further information.

Of those customers surveyed, 57% have had their most recent direct dealings in the last 3 months. Refer to Figure 5.8 for further information.

Figure 5.6: Frequency of Direct Dealings with NSW Government Services

Customers were asked "How frequent are your direct dealings with NSW Government services?"

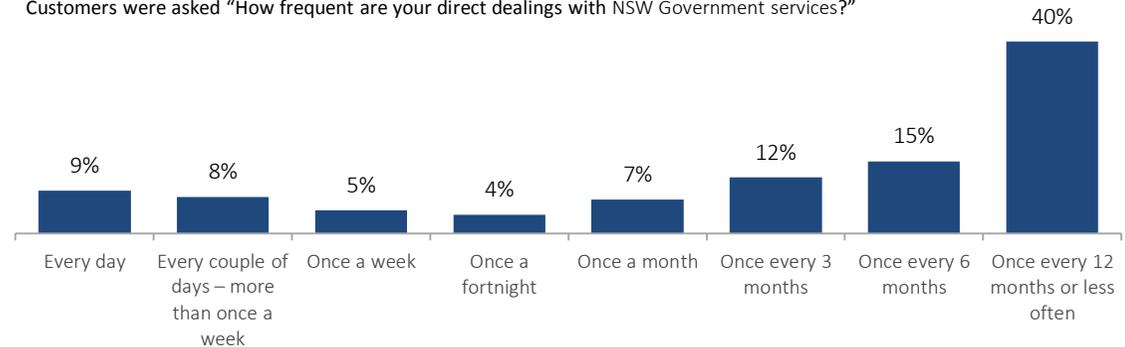


Figure 5.7: Duration of most recent direct dealings with NSW Government services

Customers were asked "What is the duration of your typical direct dealings with NSW Government services?"

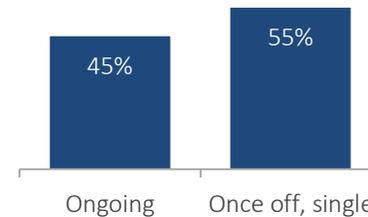
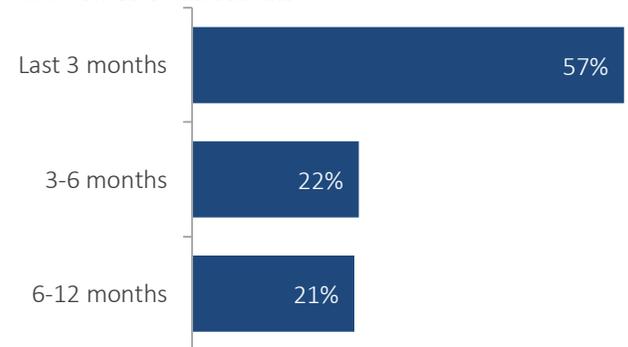


Figure 5.8: Most recent direct dealing with NSW Government services

Customers were asked "When was your most recent direct dealing with NSW Government services?"



Detailed Findings

1. Overall performance - *Key Findings 1, 2, 3, 4 & 5*

2. Performance against customer satisfaction drivers - *Key Findings 6, 7 & 8*

3. Complaints handling - *Key Finding 9*

4. Perceptions of online services - *Key Findings 10, 11, 12, 13 & 14*

5. Variation in service contact method across services – *Key Finding 15*

6. Comparison of performance to other jurisdictions – *Key Findings 16 & 17*

Variation in Overall Performance Across Services

Areas covered in this section

1. Comparison of Performance Across Jurisdictions.....p. 81
2. Customer Perceptions of the Public Service ‘Brand’ Across Jurisdictions.....p. 83
3. Comparison of Performance Against Drivers of Satisfaction Across Jurisdictions.....p. 85
4. Comparison of Complaints Handling Processes Across Jurisdictions.....p. 89
5. Differences in Online Service Adoption and Experiences Across Jurisdictions.....p. 94

Summary Findings

- NSW Government has a positive ‘brand’ perception when compared to other industries, which is on par with its Australian counterparts and UK Public Service, but below the Canadian Public Service.
- NSW Government services overall perform on par with other jurisdictions in consumers perceptions of the performance of their employees and values, and are slightly ahead of other jurisdictions in business perceptions of employees.
- Across jurisdictions, customers consistently rate government services lower against process attributes, in particular ‘processes are designed to reduce wait times’.
- Across jurisdictions, customers were positive about the performance of government services in ‘safeguarding privacy and confidentiality’ but were less positive in their perceptions of ‘public participation in decision making’.
- 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.
- The UK leads across jurisdictions in perceptions of how easy it is to make a complaint for consumers, while Canada performs lowest. NSW businesses find it easiest to lodge a complaint.

Key Findings Covered in this Section:

Key Finding 16: Consumer perceptions of NSW Government Services is high compared with other jurisdictions, and the ‘brand’ of NSW Public Service overall is on par compared to other industries

Key Finding 17: All jurisdictions have seen a positive shift across the overall measures of customer satisfaction, expectation and comparison to ideal service since 2015.



Comparison of Performance Against Customer Satisfaction and Expectation

At a whole-of-government level, NSW is performing on par with other Australian Eastern States, Canada 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 VIC and Canada in customers' perceptions of the overall satisfaction with services provided by their government in the last 12 months (average satisfaction score of 7.5). NSW businesses are on par with overall satisfaction scores for QLD and Canada (average satisfaction score of 7.5), refer to Figure 6.1 for breakdown by jurisdiction).

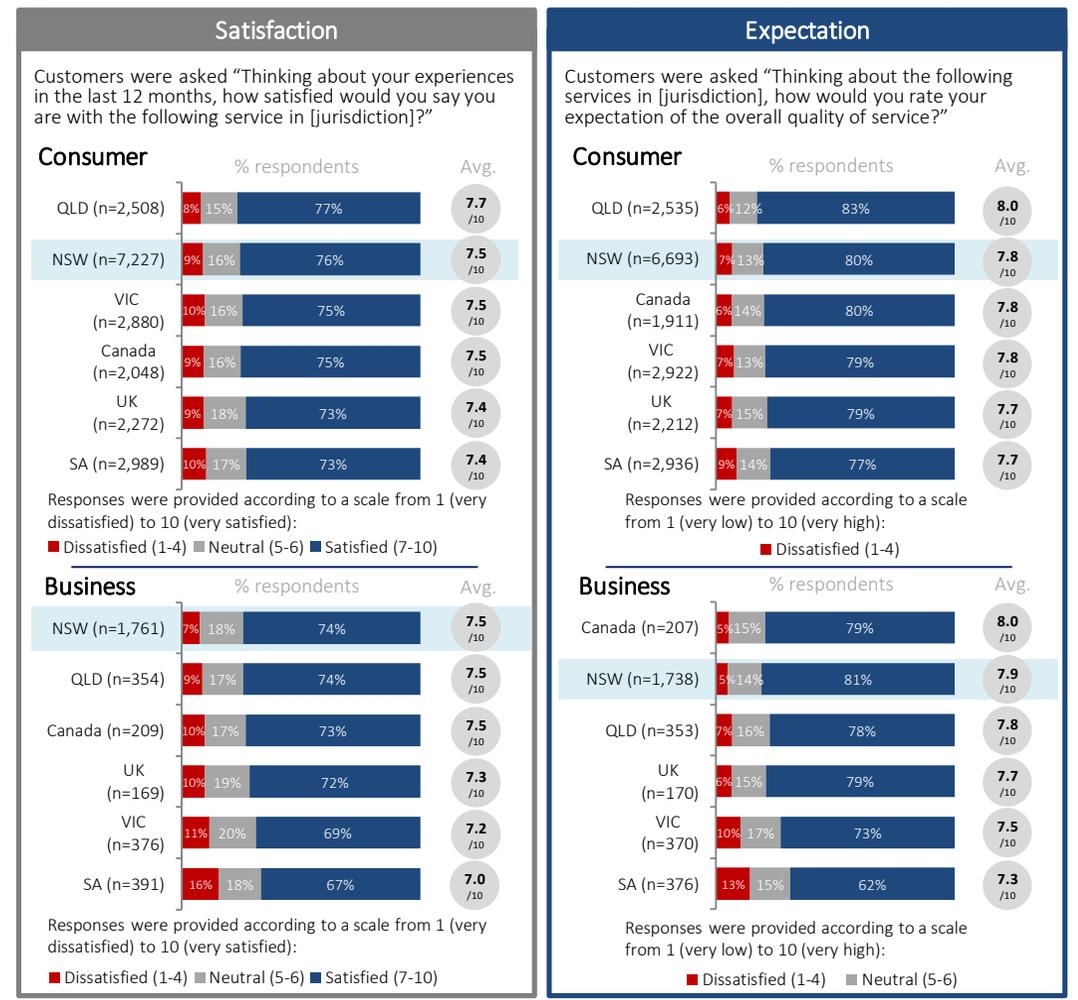
NSW is also performing in line with Canada and VIC in consumers' levels of expectation with services provided by their government (average expectation score of 7.8). High expectations across all jurisdictions suggest customers previous experiences (prior to the last 12 months) have also been positive as the more satisfied customers are with their experiences with government services, the higher their expectations are for future interactions (strong correlation between satisfaction and expectation scores).

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, attributes and contact methods which present opportunities for cross-jurisdiction learnings.

“It's a government service, you aren't paying them anything, so I rate them against that. On the contrary, you expect a little bit more, being a government service”
- Consumer

“I'd expect Global market research to evaluate best practices from government agencies in foreign countries, such as the Germany or UK”
- Business customer

Figure 6.1: NSW consumer and business satisfaction and expectation compared to other jurisdictions



Comparison of Gap to Expectations and Ideals Across Jurisdictions

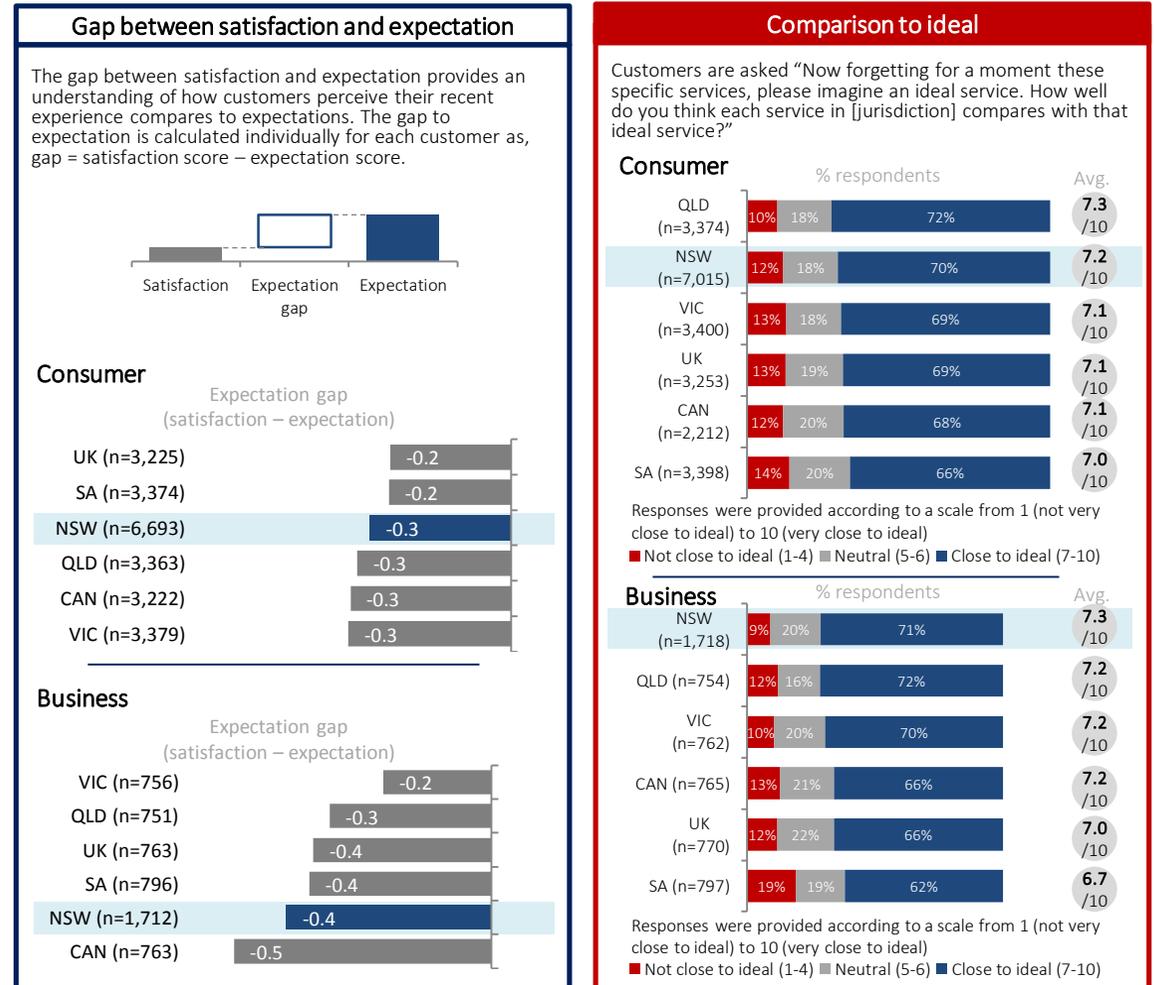
Across Australian Eastern States, Canada and the UK, government services are consistently not performing to customer expectations

Customer satisfaction with the experience delivered by government services in NSW, SA, VIC, QLD, CAN and the UK is consistently below expectations (refer to Figure 6.2).

For consumers, the average gap between satisfaction and expectation is -0.3 in NSW which is on par with other jurisdictions (ranging from -0.2 to -0.3). NSW rates better than average (70%) when comparing NSW to an 'ideal' experience (7-10 out of 10). Other jurisdictions range from 66% to 72%. Comparing the 2015 results, NSW has improved in its comparison to ideal (70% rate 'close to ideal', compared to 65% in 2015).

Among businesses, NSW Government services perform below other jurisdictions except Canada in the gap to expectations (expectation gap ranging from -0.2 to -0.5). However they rate well when comparing to an ideal service. This is on par with the 2015 result for NSW, however UK and VIC have improved their results.

Figure 6.2: 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 its Australian counterparts, but below the Canadian Public Service.

Customers across jurisdictions were asked to rate their satisfaction with a range of industries, to compare relative perceptions of the public service 'brand'. In the 2016 survey the Federal Government was added an industry comparison.

Customers' perceptions of the NSW services overall has significantly increased from 2015 to 2016, ranking between airlines and banks.

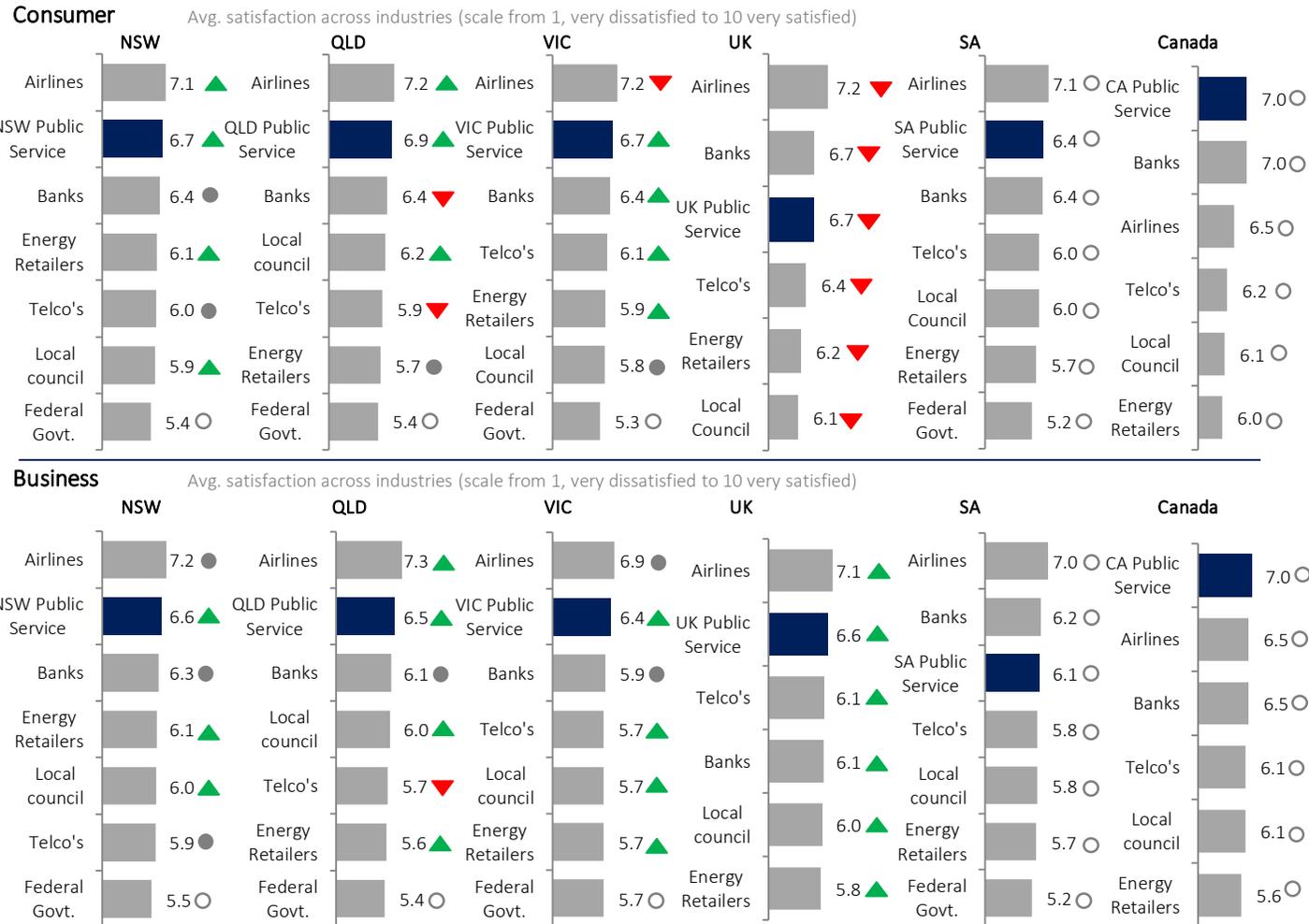
NSW Government has a positive 'brand' perception amongst consumers when compared to other industries. This is consistent with consumers' brand perception in other jurisdictions where Airlines has the highest average satisfaction. Canadian Government Services is a standout performer relative to other industries with an average score of 7.0 out of 10.

For businesses, NSW Government has a positive 'brand' perception when compared to other industries. This is consistent with businesses' brand perception in other jurisdictions where Airlines has the highest average satisfaction. Canadian Government services have the highest brand perception across all jurisdictions with an average score of 7.0 out of 10.

- ▲ 2016 result improved from 2015
- 2016 result the same as 2015
- ▼ 2016 result lower than 2015
- Comparison not available

Figure 6.3: 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? "



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.

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.

Results indicate that sentiments towards the NSW Government are in line with sentiments towards Canada and QLD (refer to Figure 6.4).

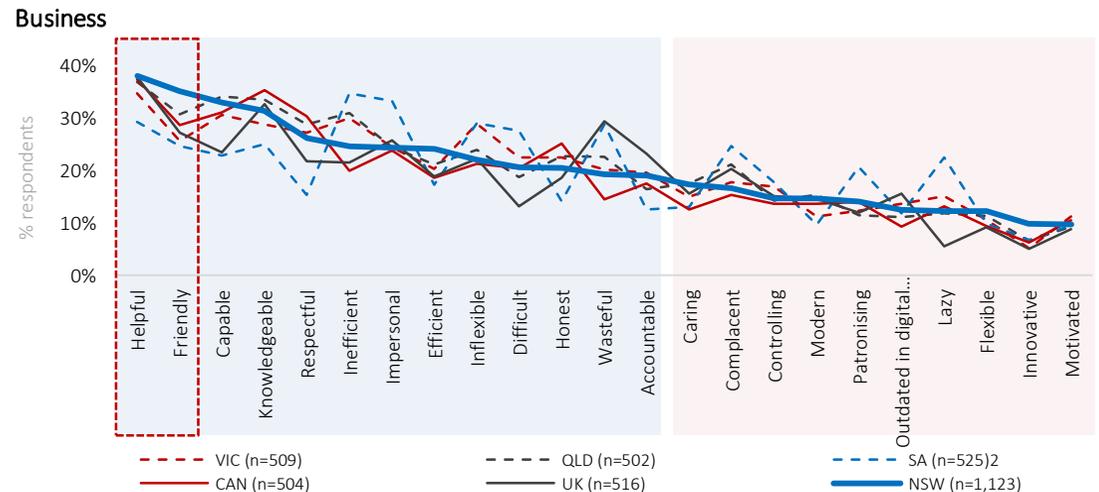
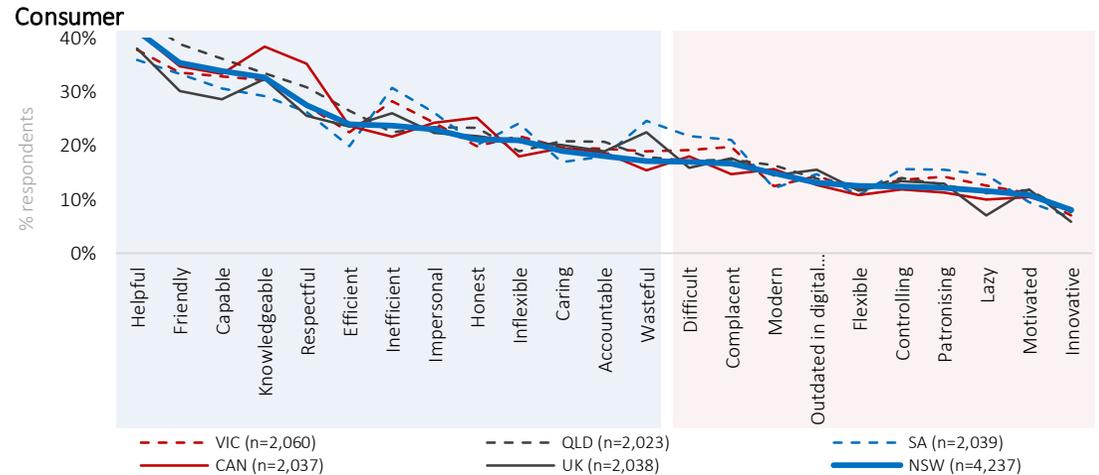
The words most commonly used by customers to describe the NSW, Canada, QLD, SA, UK and VIC Public Services overall are the positive descriptors of helpful, friendly, capable and knowledgeable, revealing a level of consistency in perceptions of government across jurisdictions. Moreover, NSW leads SA,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

The most commonly selected words to describe the Public Service across jurisdictions are the negative descriptors of inefficient, impersonal and inflexible.

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

Figure 6.4: 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?”



 NSW rated higher than other jurisdictions



Comparison of Customer Views on Performance Against Employee Related 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 6.5).

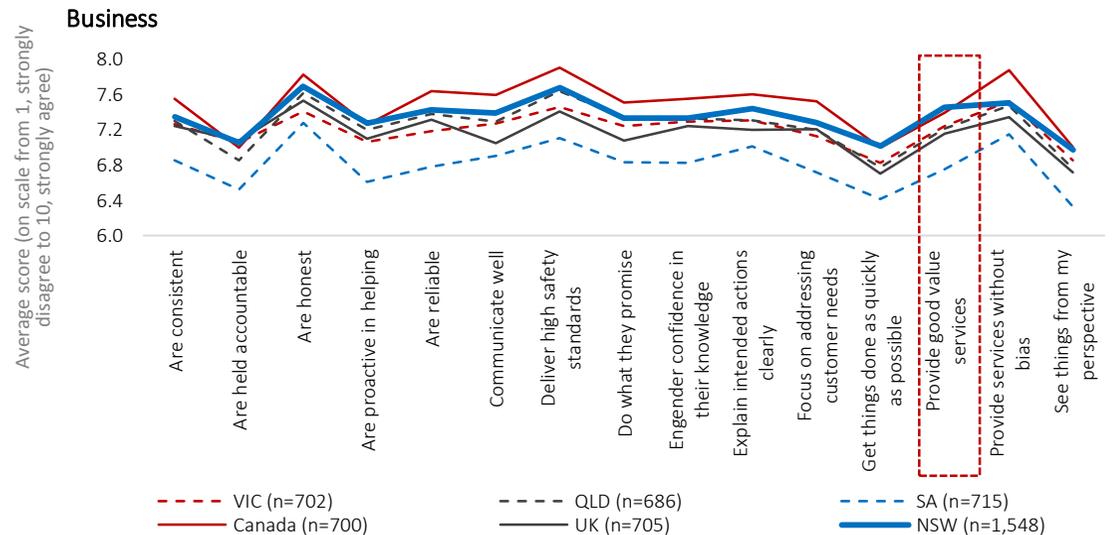
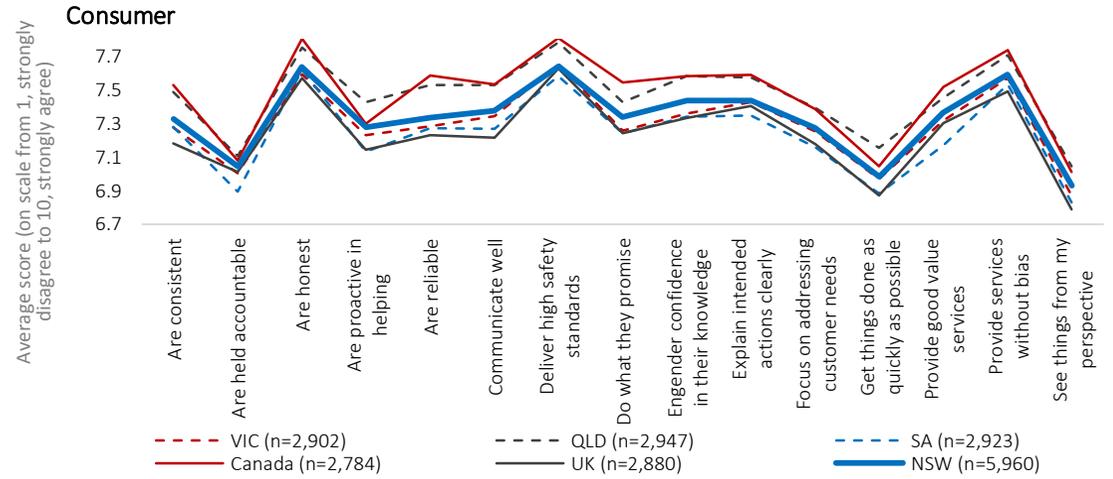
Government service employees are consistently rated highest against the attributes of 'are honest', 'deliver high safety standards' and 'provide services without bias' (average scores ranging from 7.5 to 7.8 for consumers and 7.1 to 7.9 businesses across all attributes) and lowest against the attributes of 'are held accountable', 'get things done as quickly as possible' and 'see things from my perspective' (average scores ranging from 6.8 to 7.2 for consumers and 6.3 to 7.1 for businesses across all attributes). Results suggest efficiency and customer focus are consistent areas where government service employees could improve.

Compared to NSW, Canadian and Queensland consumers rate their 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 services (refer to Figure 6.5), including 'get things done as quickly as possible' (average score of 7.0 out of 10 in NSW compared to 6.7, 7.0, 6.4, 6.8 and 6.8 in the UK, Canada, SA, VIC and QLD respectively), 'provide good value services' (average score of 7.5 in NSW compared to 7.2, 7.4, 6.8, 7.2, and 7.2 in UK, Canada, SA, VIC and QLD respectively) and, 'see things from my perspective' (average score of 7.0 in NSW compared to 6.7, 7.0, 6.3, 6.9 and 6.8 in UK, Canada, SA, VIC and QLD respectively).

Figure 6.5: Comparison of performance against each of the employee related 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]?"



NSW rated higher than other jurisdictions

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 6.6).

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 to 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).

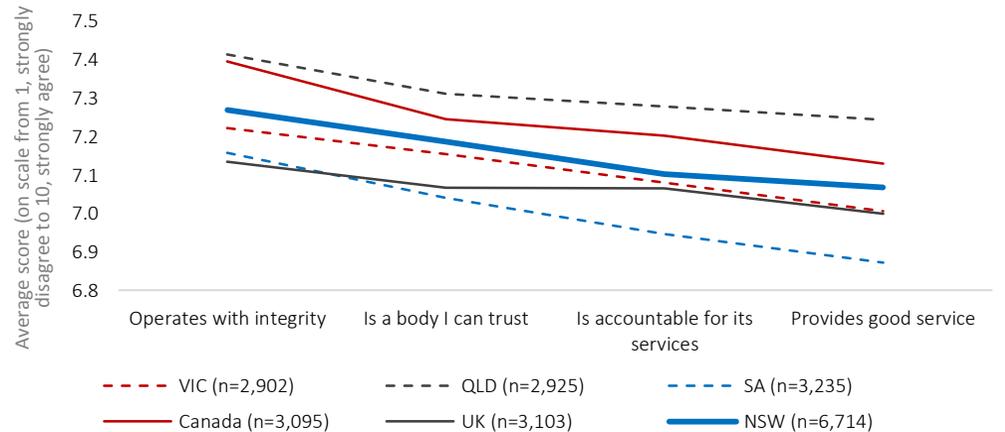
Among businesses, Canada leads other jurisdictions in perceptions that government services against the value 'operate with integrity' (average score of 7.5). NSW leads other jurisdictions in perception of performance against the value of 'is accountable for its services' (average score of 7.1 in NSW compared to 7.1 in QLD and Canada, 7.0 in VIC and UK and 6.5 in SA). This is consistent with more positive perceptions of NSW Government services among businesses for several employee related attributes relating to customer focus and accountability.

 NSW rated higher than other jurisdictions

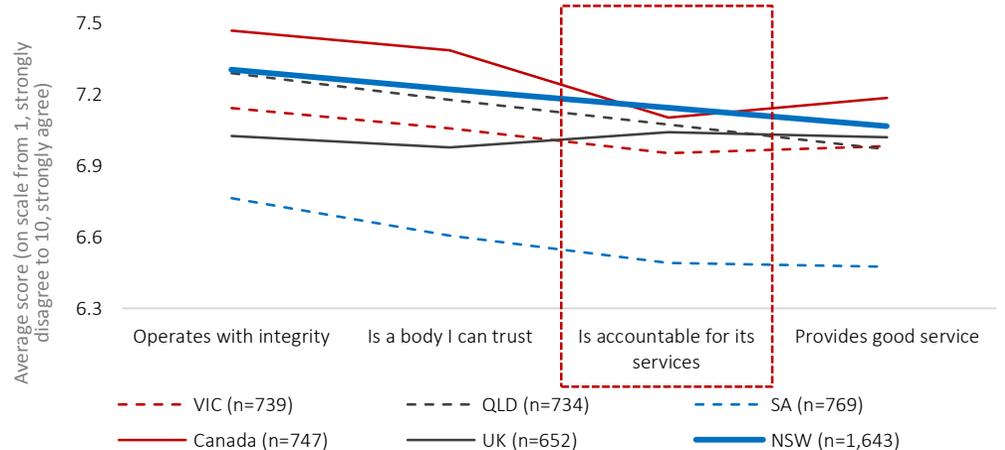
Figure 6.6: Comparison of performance against each of the values

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 '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 6.7).

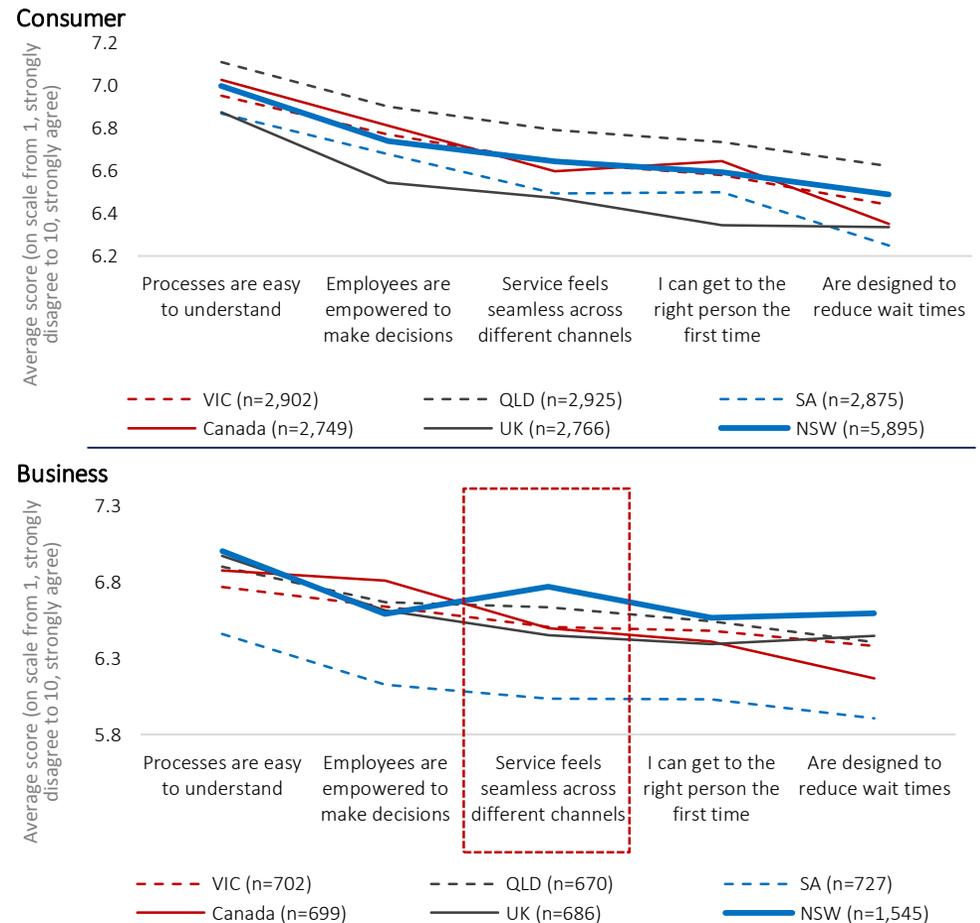
Government services are consistently rated highest on 'processes are easy to understand' and lowest on 'Are designed to reduce wait times'.

Among businesses, NSW leads other jurisdictions in 'service feels seamless across different channels' (average score of 6.8 in NSW compared to 6.6 in QLD, 6.5 in VIC and Canada, 6.4 in UK and 6.0 in SA). This is consistent with more positive perceptions of NSW Government services among businesses for several employee related attributes relating to 'explaining intended actions clearly' and perceptions that government services 'operate with integrity'.

In every jurisdiction, 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 6.7: 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?"



 NSW rated higher than other jurisdictions

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 ‘public participation in decision making’.

Across jurisdictions, there is little differentiation in the perceived performance of government services against goals relating to the access and transparency of government services (refer to Figure 6.8).

Government services are consistently perceived to be performing positively against ‘safeguard privacy and confidentiality’ (average scores ranging from 7.3 to 7.6 for consumers and 7.2 to 7.7 for businesses).

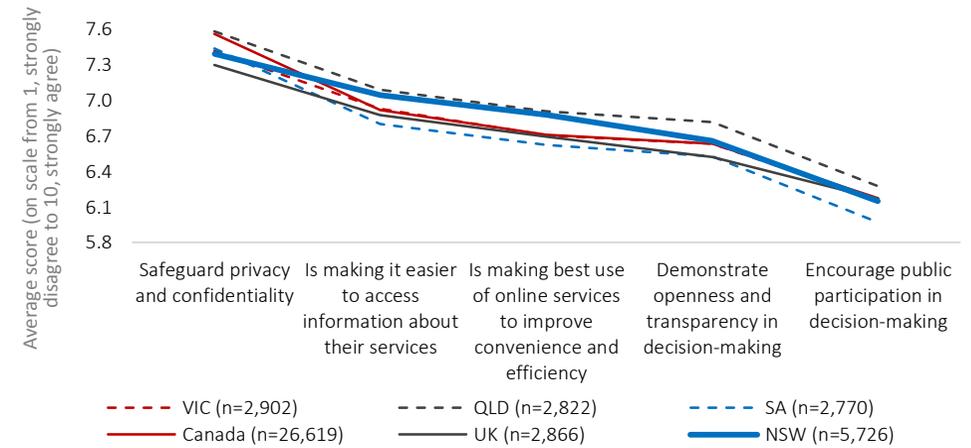
Government services across all jurisdictions are perceived to be performing least positively on ‘demonstrate openness and transparency in decision-making’ (average scores ranging from 6.5 to 6.8 for consumers and 6.5 to 6.6 for businesses) and ‘encourage public participation in decision making’ (average scores ranging from 6.1 to 6.3 for consumers and 6.1 to 6.3 for businesses). Across all goals and results, the average score increased by 0.5 from the results of last year’s survey.

NSW Government services were above other jurisdictions for the positively rated goals, but performed poorly in the lower scoring goals.

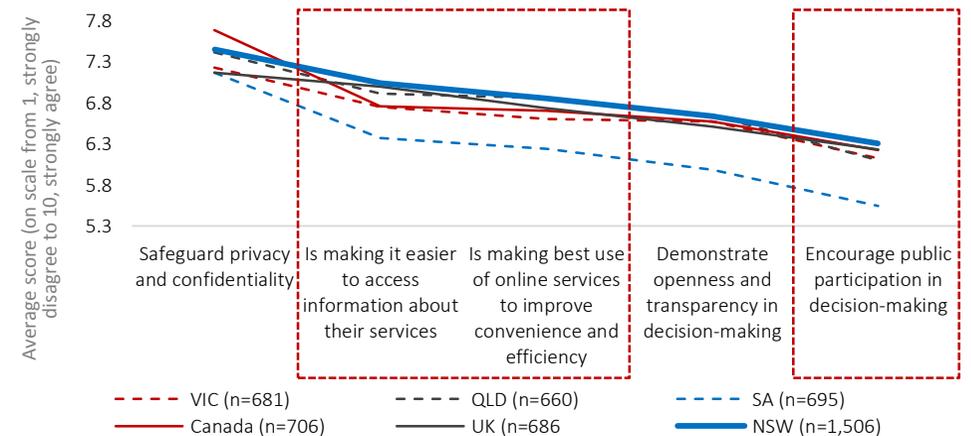
Figure 6.8: Comparison of performance against NSW Government goals

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?”

Consumer



Business



 NSW rated higher than other jurisdictions

Comparison of Proportion of Complaints Received Across Jurisdictions

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

For consumers across Australian jurisdictions, NSW has received the lowest proportion of complaints in the last 12 months. However, when compared to the UK and Canadian governments, Australia has some way to go still. Refer to Figure 6.9 for further detail.

The number of complaints made in NSW in the last 12 months has risen by 3% this year for consumers (24% in 2015) and 12% for businesses (24% in 2015).

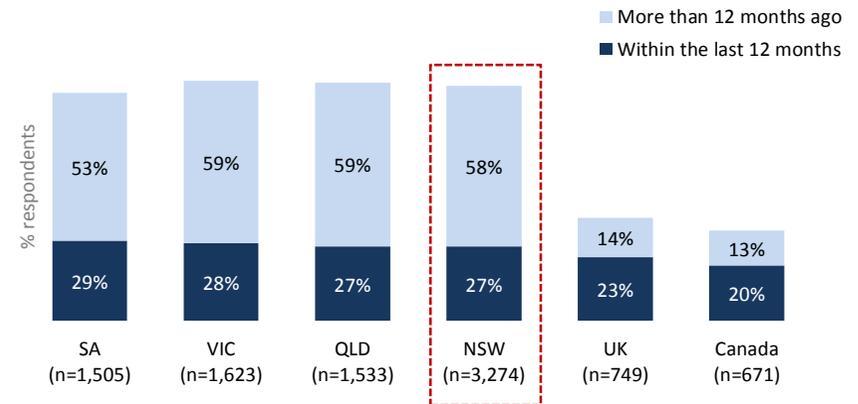
Compared to other Australian Eastern States, NSW has a similar proportion of complaints received from consumers (27% of consumers have made a complaint to a NSW Government service in the last 12 months, compared to 29% in SA, 28% in VIC and 27% in QLD).

For business, a higher proportion of complaints are received by NSW Government services compared to all other jurisdictions with 36% of businesses identifying they have made a complaint in the last 12 months. The Canadian and UK governments have the lowest number of complaints, with 34% and 32% respectively in the last 12 months. The overall spread across all jurisdictions is 4 percent.

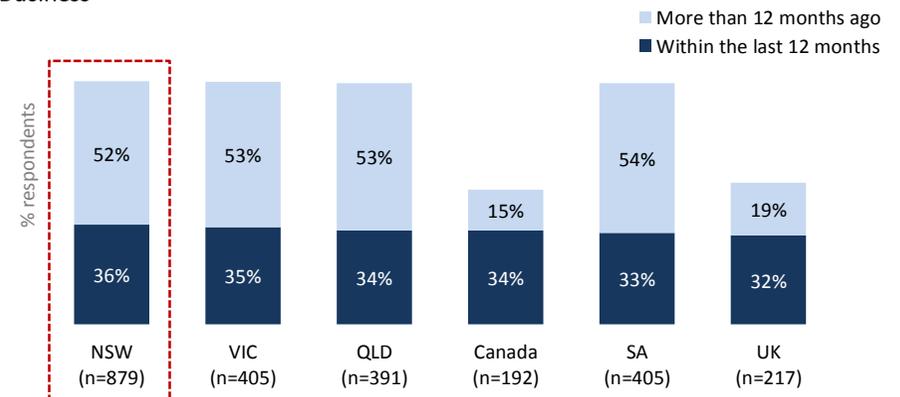
Figure 6.9: Proportion of customers who made a complaint in the last 12 months by jurisdiction

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

Consumer



Business



 NSW results

Comparison of Performance in Complaints Management

Perceptions of complaints handling in NSW were in-line with other jurisdictions, and on average the customers rated complaints handling in 2016 lower than 2015.

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

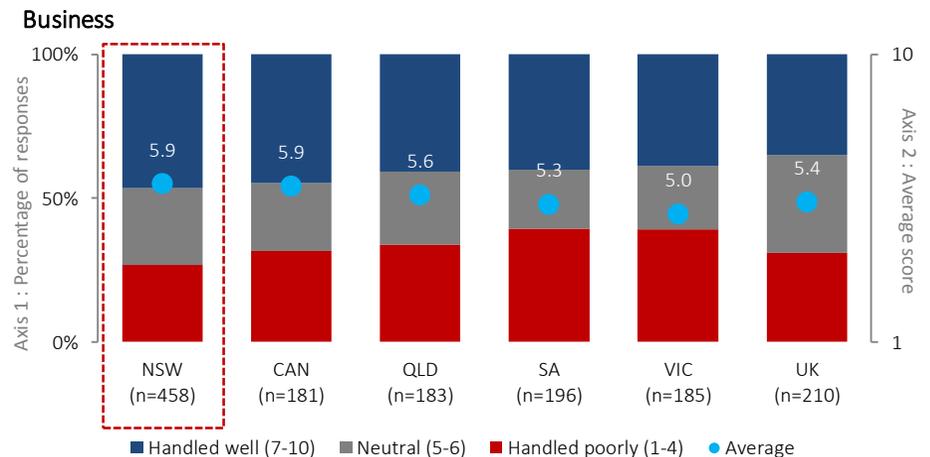
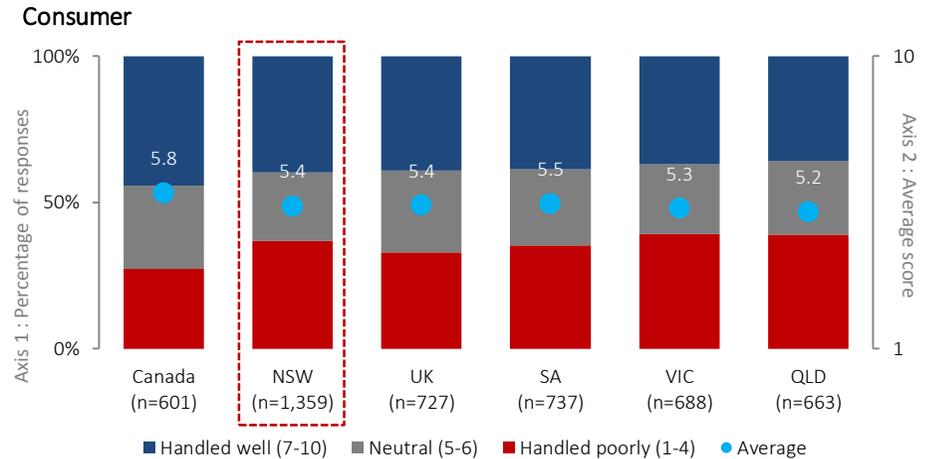
Results indicate that NSW is on par with the UK in consumer perceptions of complaints handling processes (average score of 5.4). QLD is behind all other jurisdictions in complaints handling processes (average consumer score of 5.2). Refer to Figure 6.10 for further detail.

Across jurisdictions in the 2016 survey the average complaint rating was lower than 2015. Consumers rated the average scores in 2015 for NSW, VIC and UK as 5.7 and 5.6 in QLD.

Businesses customers rated higher in 2016 (average 5.9 in 2016, compared to 5.8 in 2015), which is consistent with other jurisdictions in the survey (average score 5.9 for Canada and 5.6 for QLD).

Figure 6.10: Variation in complaints handling across jurisdictions

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



Responses were provided according to a scale from 1 (handled very poorly) to 10 (handled very well)

Comparison of Performance in Ease of Making a Complaint Across Jurisdiction

The UK leads across jurisdictions in perceptions of how easy it is to make a complaint for consumers, while Canada performs lowest. NSW businesses find it easiest to lodge a complaint.

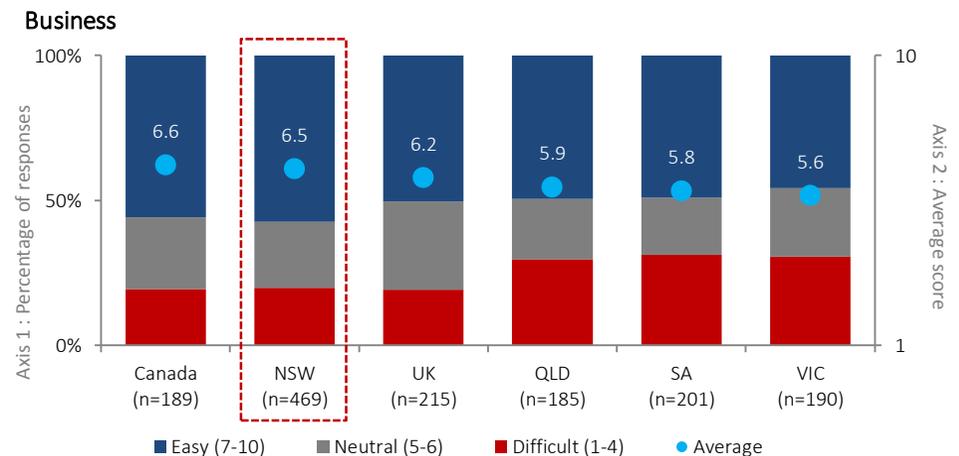
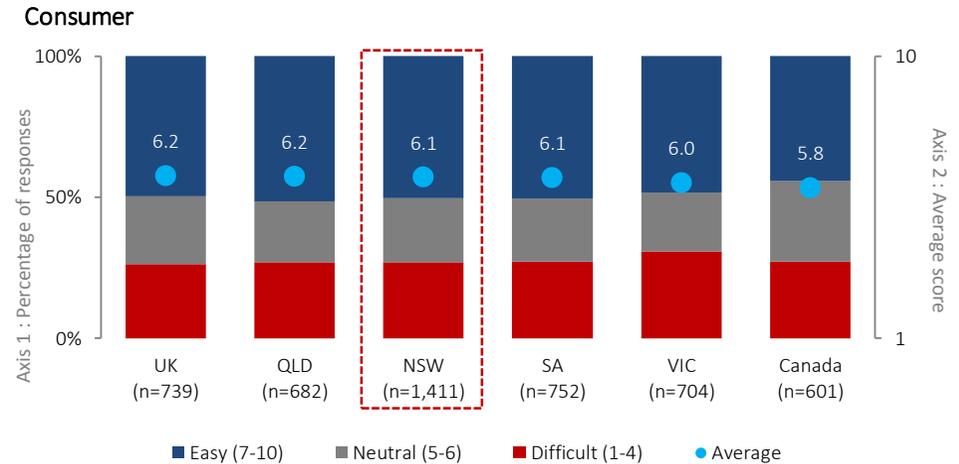
Customers across jurisdictions were asked to rate how easy it was to make their most recent complaint to a government service.

Results indicate that NSW is on par with SA in consumer perceptions of how easy it was to make a complaint (average score of 6.1, down from 6.3 last year) while the UK and QLD are ahead of other jurisdictions (average score of 6.2, also down from 6.6 in the prior year). Canada is behind all other jurisdictions (average score of 5.8). Refer to Figure 6.11 for further detail.

Businesses in Canada found it the easiest to lodge a complaint, besting NSW by 0.1 (6.6 and 6.5 for Canada and NSW respectively), which is a swing from consumer perceptions. The range of scores this year has increased to 0.8, compared to 0.2 last year.

Figure 6.11: Variation in ease of making a complaint across jurisdictions

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



Responses were provided according to a scale from 1 (very difficult) to 10 (very easy):

Differences in Contact Method Use Across Jurisdictions

More customers have gone online to interact with government services in NSW than other jurisdictions in the last 12 months. However, a majority of interactions are still conducted face to face.

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

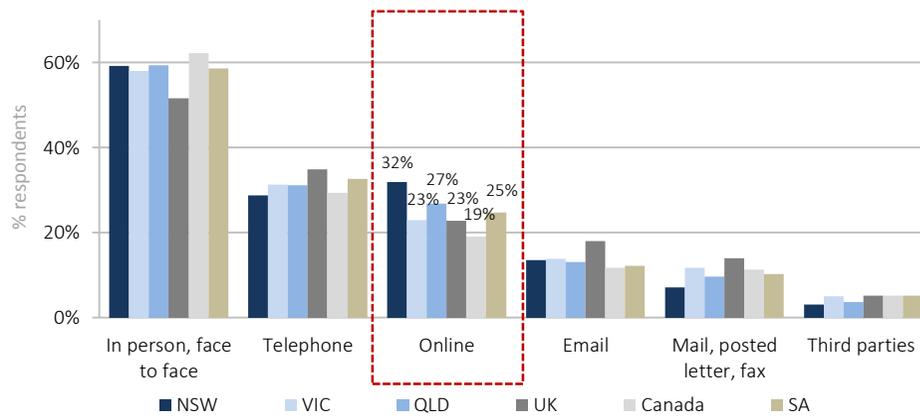
More consumers have gone online to interact with government services in NSW in the last 12 months than in other jurisdictions (32% of consumers have gone online to carry out a direct dealing with a NSW Government service in the last 12 months; down from 35% last year). Refer to Figure 6.12 for further detail.

The same trend holds true for businesses in NSW (31% of businesses have gone online to carry out direct dealing with a government service). Due to the sometimes complex nature of business questions, both face to face and telephone interactions are more common for businesses than consumers.

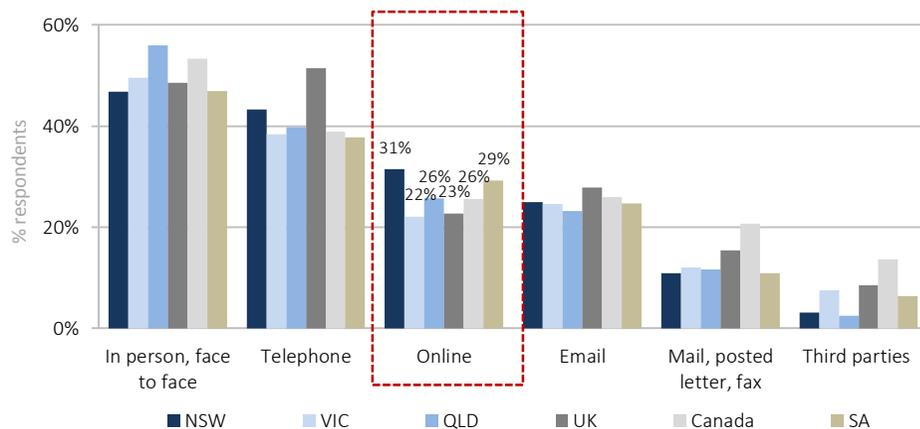
Figure 6.12: Current contact methods used when dealing with government services

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 Contact Method Preference Across Jurisdictions

Online is a more preferred contact method for interacting with government services by customers in NSW, while email is more preferred by customers in the UK. For many people, a face to face interaction is still the preferred method.

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

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

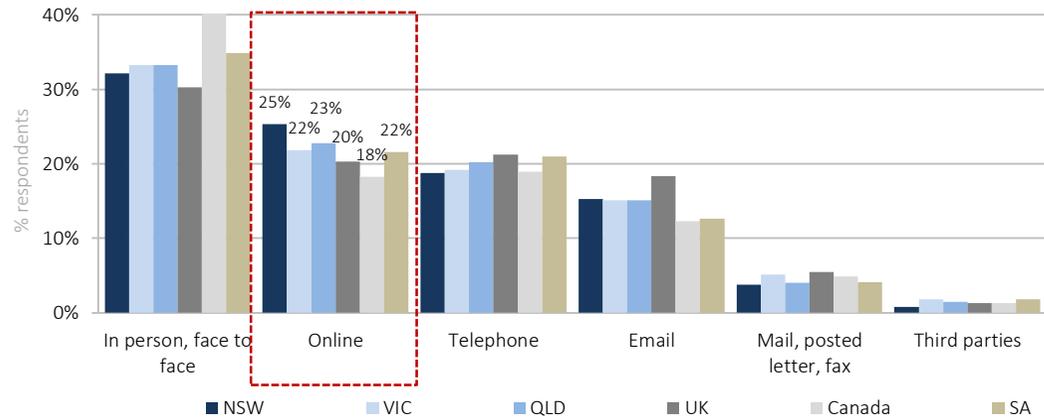
Following this, online is the second most preferred contact method for customers across jurisdictions and, in particular, is more preferred by customers in NSW for interacting with government Services (Refer to Figure 6.13).

Businesses, who are often time poor, have indicated that they prefer a form of online communication, more so than consumers. However, phone conversations remain favoured in the UK, and for other jurisdictions a face to face is still seen as most effective.

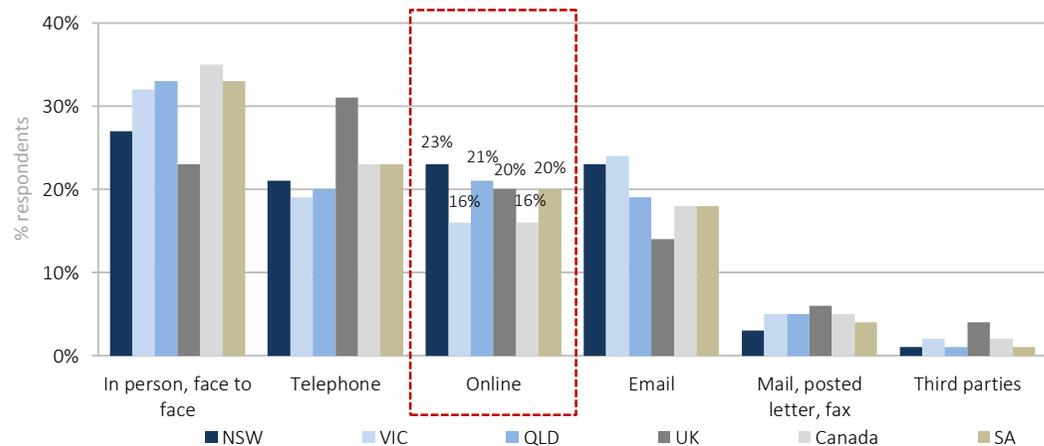
Figure 6.13: Preferred contact methods used when dealing with government services

Customers were asked, "Generally, which contact method do you most prefer when dealing directly with each of the following services in the last 12 months?"

Consumer



Business



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.

Among consumers, UK, QLD and NSW lead other jurisdictions in overall satisfaction with online services (average consumer score of 7.9 compared to 7.6 in VIC, 7.6 in Canada, 7.6 in SA). Refer to Figure 6.14.

For all attributes rated by NSW consumers, the following attributes scored highest: 'the content was current and accurate' and 'I trust my information was handled securely'.

Higher average customer satisfaction with online services in the UK is driven by high satisfaction with the currency and accuracy of content.

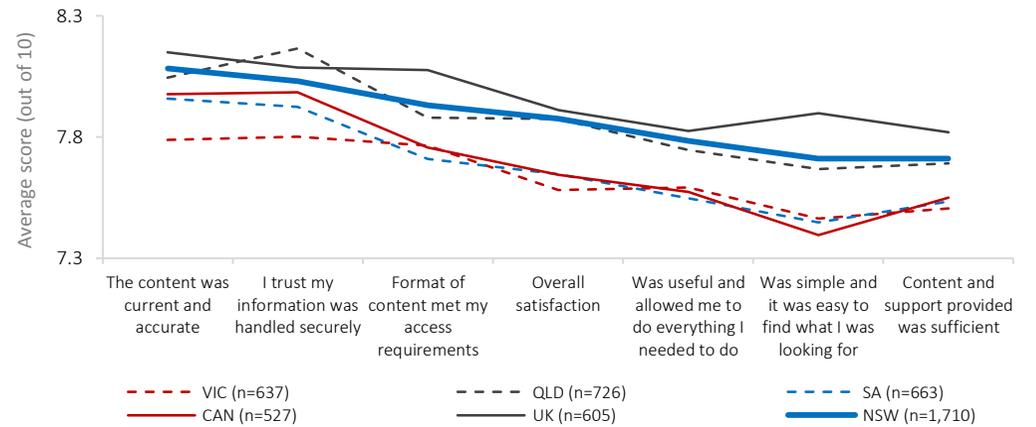
Among businesses, NSW overall satisfaction with online services is on par with UK and SA (average score of 7.8 compared to 7.6 in Canada, 7.7 in QLD and 7.1 in VIC).

These results suggest NSW has an opportunity to learn from other jurisdictions such as UK and aspects of QLD to improve their online experiences.

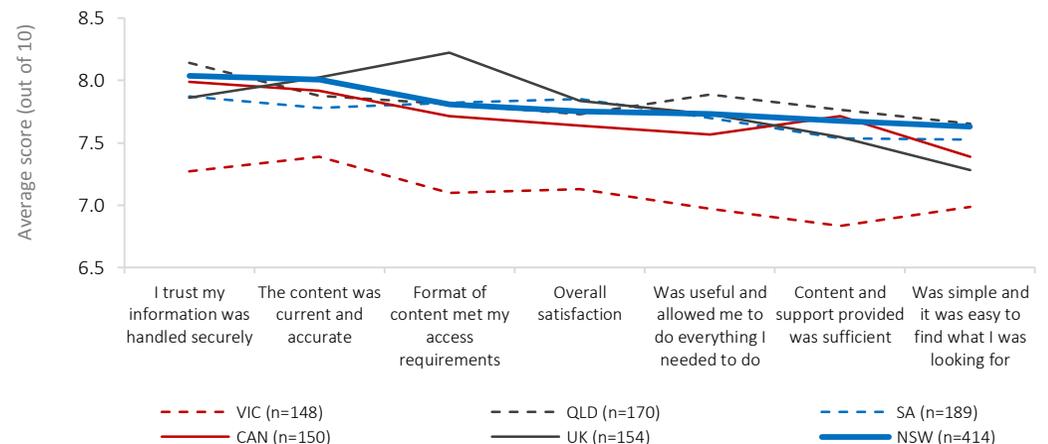
Figure 6.14: Satisfaction with attributes of Online Services

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



Differences in Satisfaction with Online Services Across Jurisdictions

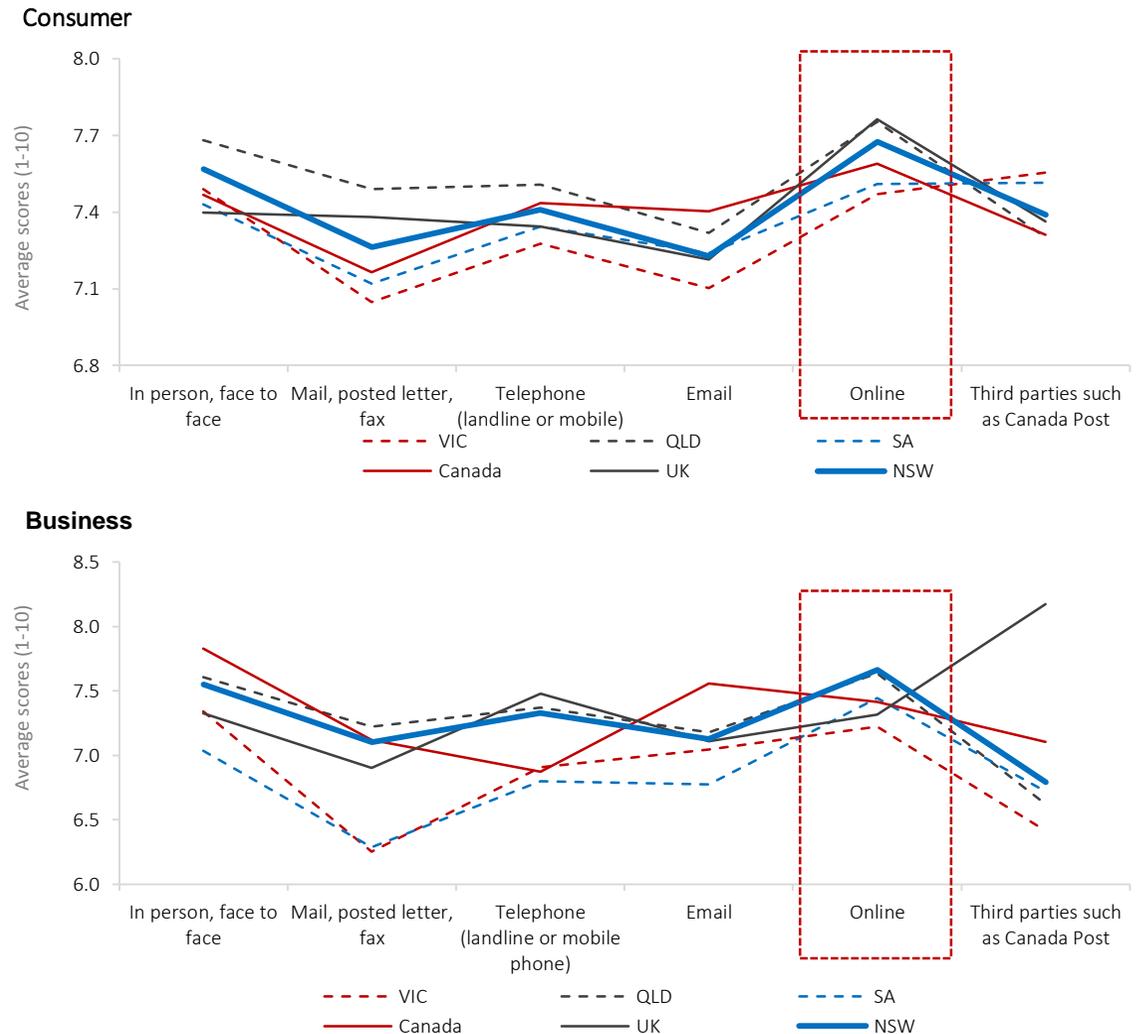
Overall satisfaction with online services.

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 both consumers and businesses).

Across every jurisdiction, online services are perceived by consumers to deliver an equal or more positive experience than other contact methods (average satisfaction of 7.5 for VIC, 7.8 for QLD, 7.5 for SA, 7.8 for UK, and 7.6 for Canada).

On the other hand, with the exception of NSW and SA (average satisfaction with online services of 7.7 and 7.4), businesses perceive online services less or equally favourably than/as face to face in other jurisdictions (with an average satisfaction with online services of 7.2 in VIC, 7.6 in QLD, 7.4 on SA, 7.3 in UK, and 7.4 in Canada)

Figure 6.15: Overall satisfaction with Government services by contact method(s) used across jurisdictions





Customer Service Commissioner
NEW SOUTH WALES

