



Customer Service Commissioner  
NEW SOUTH WALES

# NSW Whole of Government Customer Satisfaction Measurement Survey

## 2017 Detailed Report

December 2017



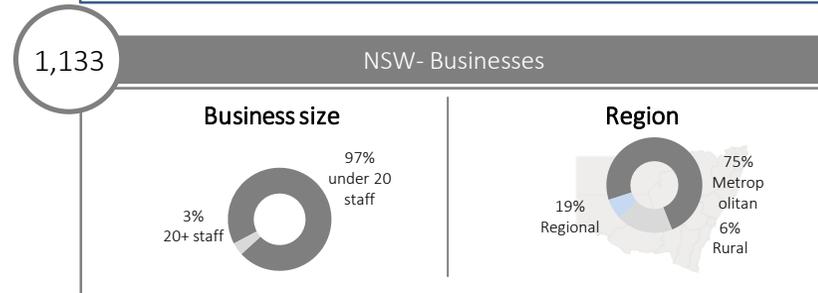
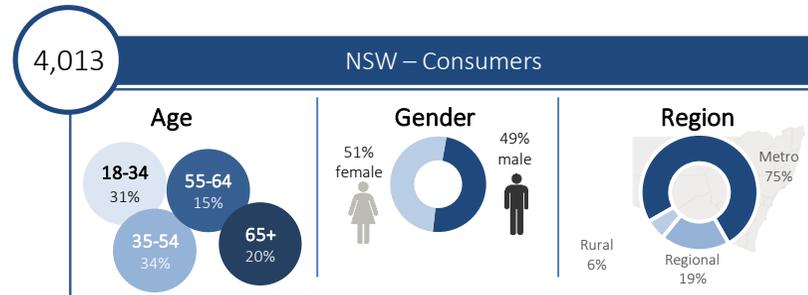
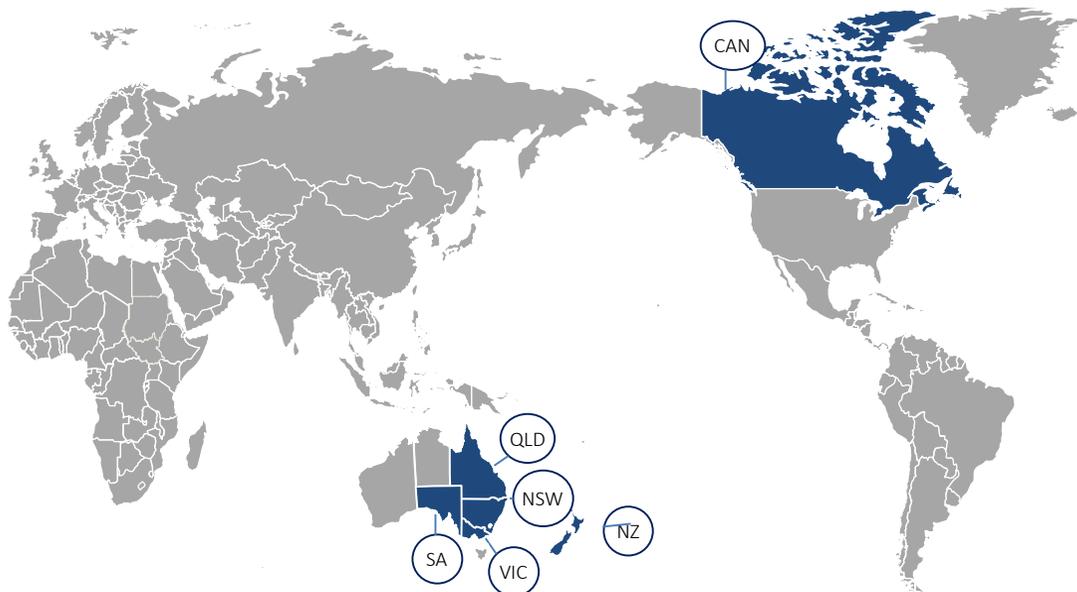
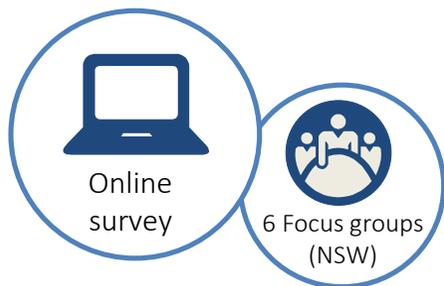
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*Note : The insights from the Business respondents are shown selectively where the results differ significantly from the consumer insights*

# Executive Summary

# We surveyed 14,000+ consumers and 3,500+ businesses across six jurisdictions via the Annual Customer Satisfaction Measurement Survey in 2017



Other jurisdictions - Consumers

Queensland	Victoria	South Australia	New Zealand	Canada
2,104	2,056	2,030	2,028	2,056

Other jurisdictions - Businesses

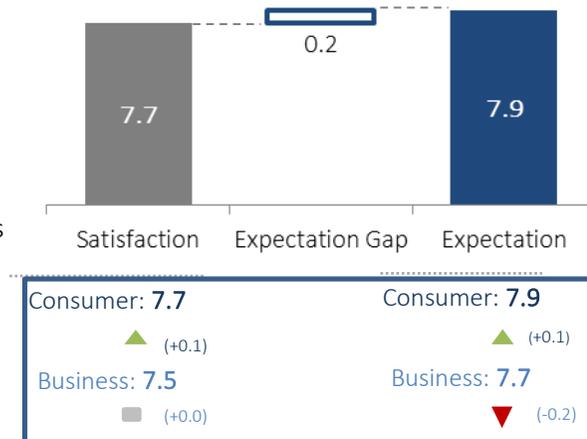
Queensland	Victoria	South Australia	New Zealand	Canada
562	506	510	509	687

## Executive Summary

There have been statistically significant gains in NSW Government service average satisfaction among consumers in 2017, building further on gains made last year

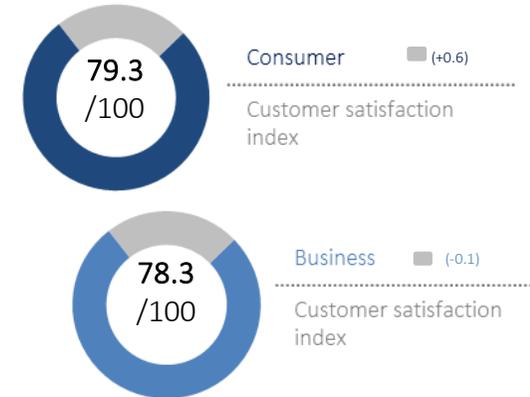
### Performance of NSW Government services against baseline measures

Consumer satisfaction and expectations have achieved statistically significant increases in 2017 compared to 2016, building on gains from 2015 to 2016. Business satisfaction has remained stable while expectations have significantly declined this year.



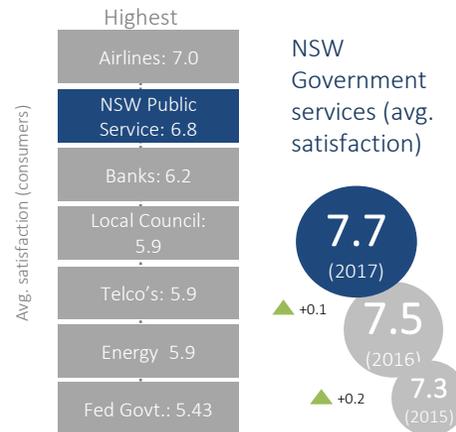
### Customer Satisfaction Index (CSI) results

The NSW CSI continues to trend upwards for consumers with further increases in 2017 compared to 2016 (not statistically significant). For businesses, the NSW CSI gains from 2015 to 2016 (+1.8/100) have steadied in 2017 with a slight decline (-0.1/100) compared to last year.



### Perceptions of the NSW Public Sector 'brand'

Customers' perceptions of the NSW 'brand' have remained stable in 2017, continuing to rank between Airlines and Banks. However, satisfaction with the NSW Public Service 'brand' still remains lower than customers' satisfaction with NSW Government services overall, which continues to trend upwards with another significant increase this year.



### Drivers of satisfaction

Eight drivers of customer satisfaction are identified in 2017 with slight changes compared to 2016. 'Softer' employee attributes relating to 'empathy and communication' have emerged as a key driver category for consumers. Improving 'access to information' and the 'efficiency and effectiveness of employees' will continue to drive the biggest increase in overall satisfaction for NSW customers.

Drivers and relative importance		
Different for 2017	Empathy and communication of employees	High
	Efficiency and effectiveness of employees	High
	Honesty and integrity of employees	High
Consistent to 2016	Access to information	High
	Privacy	Moderate
	Transparency	Moderate
	Simplicity and efficiency of processes	Moderate
	Employee autonomy	Low

Five outcome themes have been identified based on CSMS results in 2017, as outlined on the following pages



# Five outcome themes have been identified based on CSMS results in 2017

## Theme 1. Build empathy, proactivity and efficiency of employees

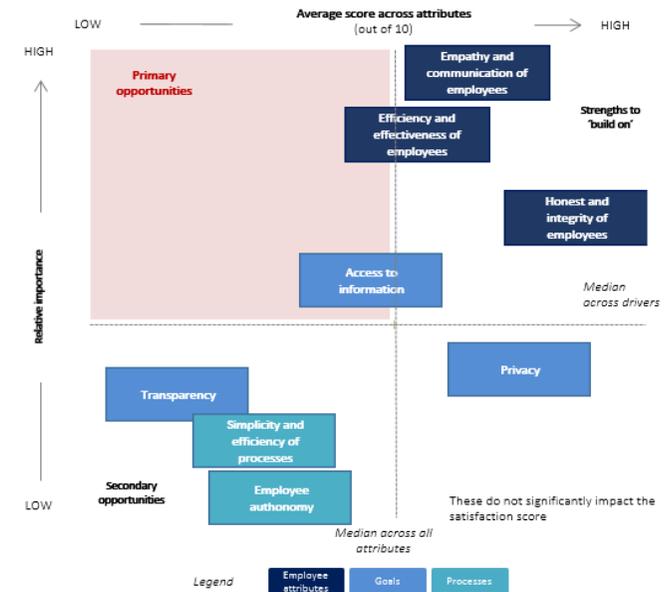
Empathy and communication is the most important Whole of Government driver in 2017 and is identified as a strength 'to build on':

- In particular, softer employee attributes such as 'proactivity' and 'seeing things from my perspective' have emerged as key drivers of satisfaction for consumers. These attributes are identified as key primary opportunity areas for approximately half of all services included in the Annual CSMS survey

Consistent to last year, employee efficiency and effectiveness is a key primary opportunity area and is also identified as a strength 'to build on'

- 'Getting things done as quickly as possible' (specific to staff/employees rather than processes) is a common driver for 13 out of the 23 services
- Improvements for faster services, reduced wait times, more staff and improved information delivery will drive satisfaction for NSW customers

Importance versus performance against each of the drivers of satisfaction 2017



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

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

## Five outcome themes have been identified based on CSMS results in 2017

### Theme 2. Further digitize the customer journey

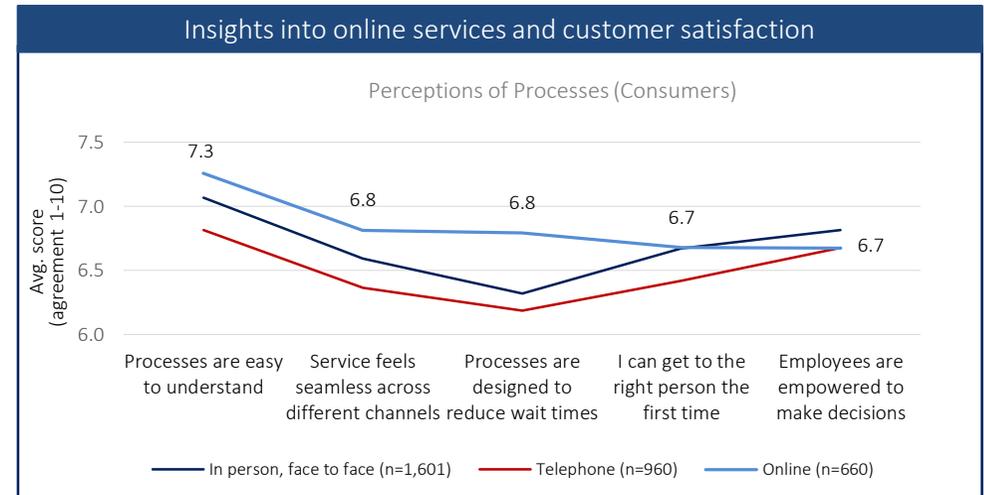
Online is an important consumer channel with high satisfaction, reflecting the need to continue the NSW Government service focus on digital.

Online is the second most used channel for consumers at the Whole of Government level and respondents who used the online channel stated that they chose to do so (as opposed to being prompted to or having no other option available).

Satisfaction with NSW Government services is highest among users of the online channel and online services are perceived to deliver a more positive experience. For instance, consumers who access NSW Government services online are more likely to identify the process as easy to understand, seamless and designed to reduce wait times. Satisfaction has also significantly increased among consumers who have accessed services online or in person compared to scores from 2016.

Improvements to information confidentiality and ease of finding information are likely to drive online usage. Consumers are most likely to go online if they are “assured my information would remain confidential” and if they are “easily able to find what I was looking for”.

Through additional qualitative research participants validated customers’ desire for the continued digitisation of key processes across government services.



## Five outcome themes have been identified based on CSMS results in 2017

### Theme 3. Recognise that businesses are clients and not customers

Expectations among business customers in NSW are changing:

- There has been a statistically significant decline in business expectations from 2016 to 2017 (7.9 to 7.7)
- NSW was the only jurisdiction to experience a statistically significant decrease in business expectations
- No jurisdictions experienced a statistically significant increase in business satisfaction
- All regions and business sizes have seen a decrease in business expectations (not statistically significant)
- Qualitative research found that businesses want to be clients not customers, with government support to consult businesses and not just deliver a service.



*“It’s the question of whether Government treats businesses as a client or a supplier. Being a client is harder than being a supplier”*

*“I expect timely turn around to process my enquiry/action and I expect a record of my transaction. I expect the least paper possible. I expect a consistent process”* Source: qualitative research



*Note: further opportunities for cross-jurisdictional learnings to enhance service performance among business in particular. For example, the high perceptions of ideal service among Canadian businesses may provide case study learnings.*

## Five outcome themes have been identified based on CSMS results in 2017

### Theme 4. Continue to make improvements to complaint management

Customers' experience of complaint handling has improved slightly year on year (YoY):

- The proportion of consumers identifying that making a complaint was easy increased by 3% YoY (from 50% to 53%)
- Among those who identified making a complaint as difficult, satisfaction among consumers significantly increased YoY (from 6.2 to 6.6/10)
- Satisfaction is higher among those who identified that the complaint was handled well compared to those who identified that the complaint was handled very poorly (for consumers 8.0/10 and businesses 7.9/10 when handled well compared to 6.6/10 and 6.4/10 when handled very poorly)
- Findings suggest that improvements to make it easier to make a complaint and to ensure that the complaint is handled well will support increased satisfaction.

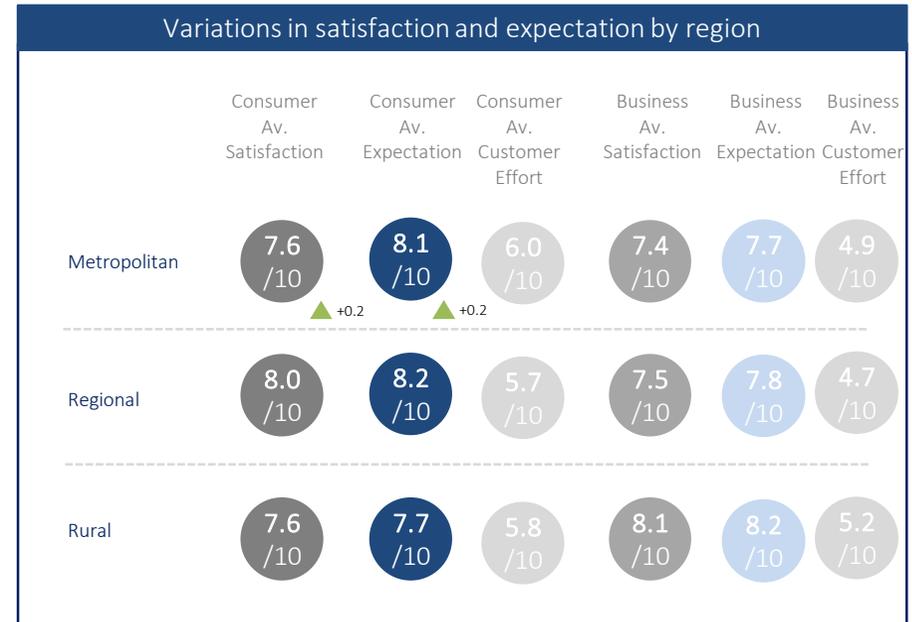


## Five outcome themes have been identified based on CSMS results in 2017

### Theme 5. Bridge the gap between metropolitan, regional and rural areas

Differences in satisfaction across regions indicate potential differences in customer experience:

- Satisfaction is highest for consumers (8.0/10) in Regional NSW (8.0/10) and highest for businesses (8.1/10) in Rural
- Customers from metropolitan areas continue to have the lowest satisfaction compared to other regions (7.6/10 for consumers and 7.4/10 for businesses)
- Expectation is highest for consumers from Regional NSW (8.2/10) and expectation is highest for businesses located in Rural NSW (8.2/10)
- Satisfaction and expectation increased statistically significantly in metropolitan regions for consumers this year however, this region continues to have the greatest gap between these two measures indicating that improvement is still required.
- Reported customer effort in regards to direct dealings with NSW Government services is lowest among Regional customers (5.7/10 for consumers and 4.7/10 for businesses)
- Hypothesis: the regional customer journey and experience may differ to rural and Metro customers, including a more personalised service in regional and rural areas



# Background and Approach

## Background

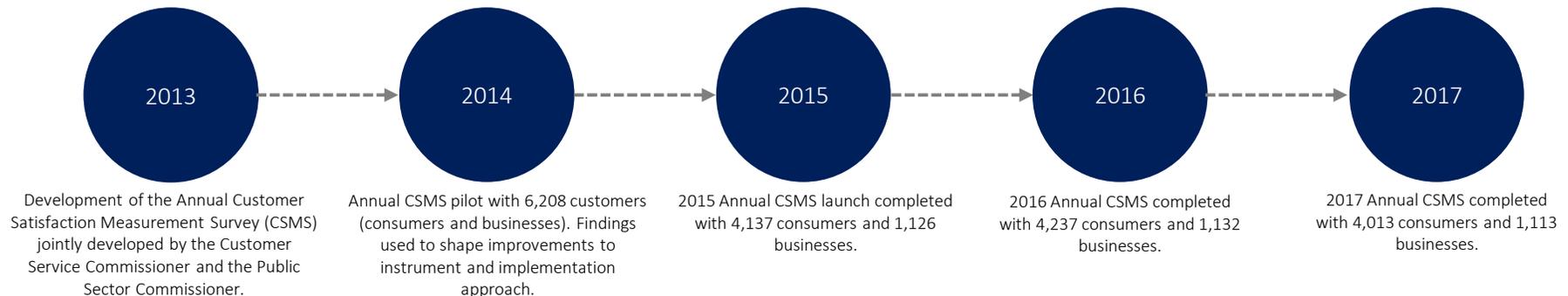
The Annual Customer Satisfaction Measurement Survey has been developed to support a continued focus on improving satisfaction with Government services.

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

The Annual 'Customer Satisfaction Measurement Survey' (Annual CSMS) 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 services 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 has been implemented annually (in 2015, 2016 and 2017), with the outputs used to measure progress against the Premier's Priority 12 – 'improve customer satisfaction with key government services across this term of government'. The results of the Annual CSMS are also used to complement existing Agency level research Programs and to provide 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 improvements in Whole of Government customer satisfaction.



## Objectives

The Annual CSMS 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 Annual CSMS has been designed to provide an understanding of:

- How New South Wales Government (NSW) services are performing overall from the customers' perspective, and with respect to other jurisdictions (including changes in results from 2016 to 2017)
- 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 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).

The survey is conducted online and 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 2016 to 2017 or year on year trends as specified in each legend.

### Structure of the 2017 Annual Customer Satisfaction Measurement Survey

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

## Research Scope and Approach

The Annual CSMS captures customer feedback on twenty-three 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-three 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 Services

#### Justice

- Police
- State Emergency Services
- Prisons
- Courts
- Fire Brigades

#### Family & Community Services

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

#### Transport

- Public Transport
- Car and Boat Registration
- Major Roads

#### Education

- Public Schools

#### Health

- Public Hospitals
- Ambulance Services

#### Finance, Services & Innovation

- Consumer Affairs (Fair Trading)
- Documentation Services

#### Planning & Environment

- Environment and wildlife protection
- Art Galleries and Museums

## Approach to Data Collection and Jurisdictional Benchmarking

Identical online surveys were undertaken with customers in New South Wales, Victoria, Queensland, South Australia, New Zealand 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.

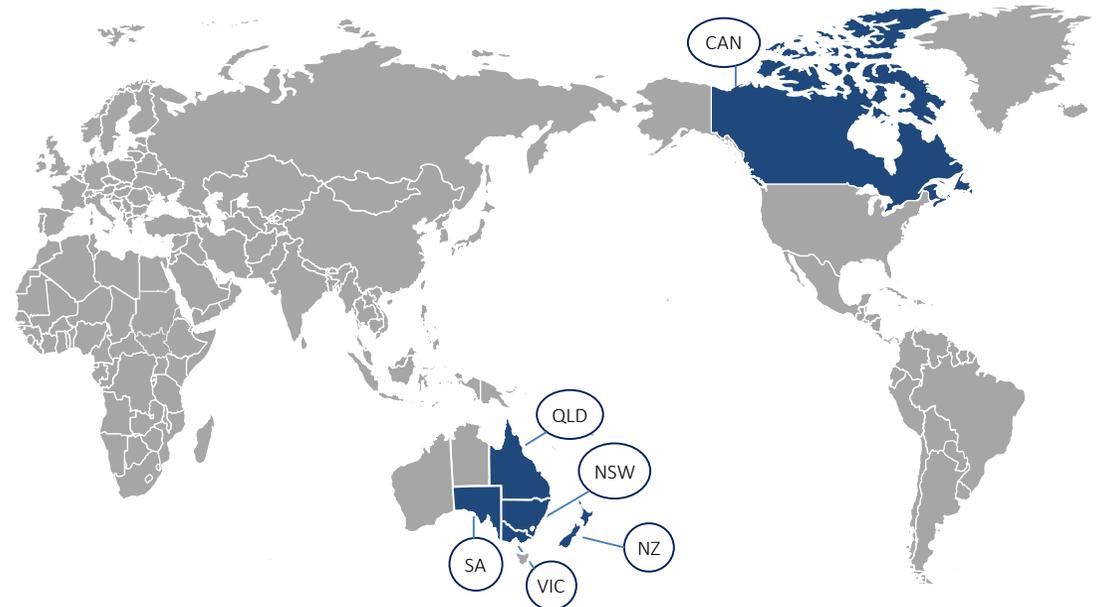
All surveys were completed over a consistent time period from 13 June 2017 to 3 July 2017 and results are therefore reflective of experiences with services across jurisdictions over the 12 months prior, from June 2016 – June 2017.

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.

### 2017 Survey Sample Size

Jurisdictions	Consumer (n=)	Business (n=)	Total (n=)
New South Wales	4,013	1133	5,146
Queensland	2,104	562	2,666
Victoria	2,056	506	2562
South Australia	2030	510	2540
New Zealand	2028	509	2537
Canada	2,056	687	2,743



## Additional Qualitative Research

Qualitative research complements the Annual CSMS survey results by providing additional insights and context.

A total of 6 focus groups (4 Consumer and 2 Business) were conducted to capture appropriate depth and breadth of insights on a range of topics.

### OVERALL OBJECTIVES



#### Approach:

- 6 to 8 participants with a mix of age, gender, location, and experience
- Where a cluster is represented, respondents will have interacted (i.e. direct dealings) with that particular service within the past 12 months
- Each focus group a duration of 1.5 hours
- Maximum 3 topics to ensure each area covered in sufficient depth
- 2 x Business focus groups for theme deep dive into the decline of expectations, understand the gap between satisfaction and expectation and understand the attributes of 'ideal' service
- 4 x Consumer focus groups for cluster supplement and theme deep dives, plus Whole of Government level context

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

		Region	
		Sydney (CBD)	Western Sydney (Parramatta)
Customer / Service Focus	Business Customers	1 x group	1 x group
	Education	1 x group	
	Transport	1 x group	
	Industry (TAFE/Water Supply)	1 x group	
	Service Line Naming*		1 x group

Note: these qualitative insights should not be interpreted as stand alone insights due to the small number of focus groups and overall small sample sizes

\*Service Line Naming refers to the customer language used for referencing the NSW Government services and the types of interactions customers have

## NSW Customer Satisfaction Index

There has been an indicative improvement (not statistically significant) in the Customer Satisfaction Index in 2017 for both consumers and businesses.

The Customer Satisfaction Index provides a more complete picture of Government performance in service delivery rather than a standalone 'customer satisfaction' metric.

Results show the NSW Customer Satisfaction Index score in 2017 is 79.3 out of 100 for consumers (an insignificant increase of 0.6 since 2016) and 78.3 out of 100 for businesses (an insignificant decrease of 0.1 since 2016). Refer to Figure 1.1.

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 1.2 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 customer's perceived ideal service.

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

Figure 1.1: Customer satisfaction index score for 2017

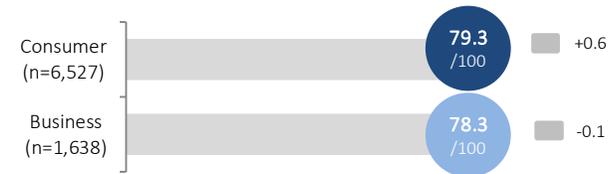
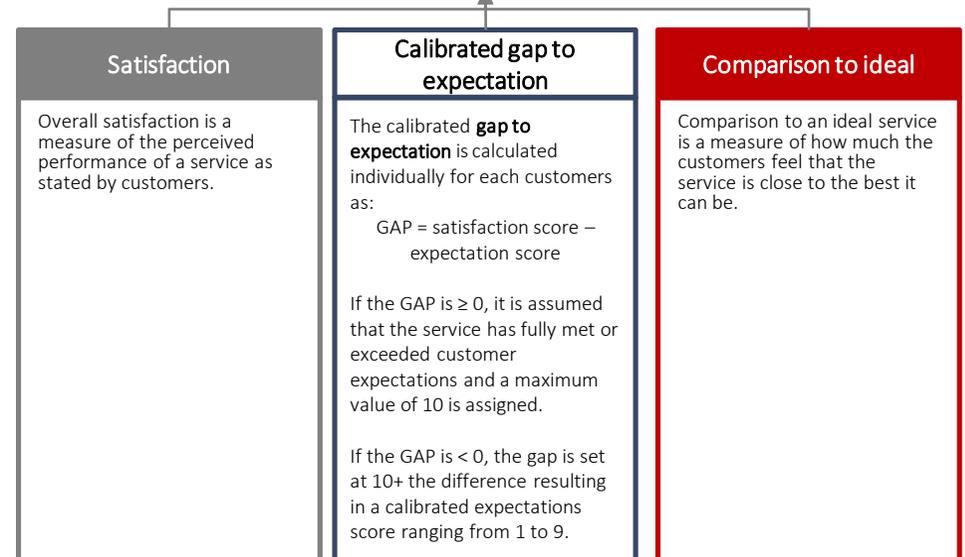


Figure 1.2: Customer satisfaction index methodology diagram

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



Legend:

- ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
- No significant change in avg. from 2016 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

# Whole of Government Key Findings in 2017

## Summary of Key Findings in 2017 (1 of 2)

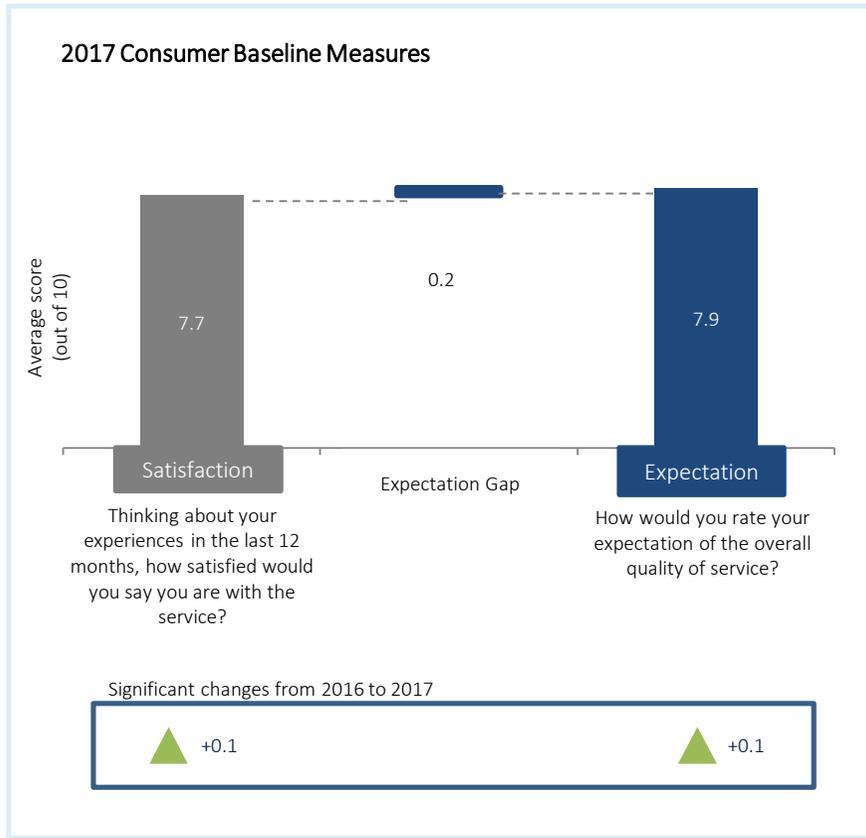
Theme	Key finding
Overall performance	<ul style="list-style-type: none"> <li>• <b>Key Finding 1:</b> Average satisfaction and customer expectations for consumers have experienced a statistically significant increase since 2016. Although customer satisfaction for businesses has remained constant since 2016, there has been a significant decrease in the average expectation score for businesses.</li> <li>• <b>Key Finding 2a:</b> The NSW Customer Satisfaction Index increased for consumers by 0.6/100, and remained relatively stable (decreasing slightly by 0.1/100) for businesses from 2016 to 2017.</li> <li>• <b>Key Finding 2b:</b> Among consumers, the comparison between NSW services and an ideal service remained stable from 2016 to 2017. The gap decreased significantly among businesses.</li> <li>• <b>Key Finding 3a:</b> Customers' perceptions of the NSW Public Service 'brand' overall has increased slightly (not statistically significantly) from 2016 to 2017, while scores for all other industries have decreased.</li> <li>• <b>Key Finding 3b:</b> Satisfaction with the NSW Public Service 'brand' still remains lower than with NSW Government services overall with no statistically significant change over time.</li> </ul>
Performance Against Customer Satisfaction Drivers	<ul style="list-style-type: none"> <li>• <b>Key Finding 4:</b> A significant increase in satisfaction of service quality attributes from 2016 to 2017 is helping to drive improvements in overall satisfaction for consumers while significant declines in satisfaction of employee and process attributes for businesses are likely contributing to declines in business expectations.</li> <li>• <b>Key Finding 5:</b> The groupings of drivers have slightly changed from 2016, with 'softer' employee attributes such as empathy and communication emerging as key drivers of satisfaction for consumers.</li> <li>• <b>Key Finding 6:</b> Focusing on improving 'access to information' and the 'efficiency and effectiveness of employees' will drive the biggest increase in overall satisfaction for NSW customers.</li> <li>• <b>Key Finding 7:</b> The relative importance of satisfaction drivers vary across services. This implies a continued need for targeted service priorities to support Whole of Government outcomes.</li> <li>• <b>Key Finding 8:</b> Faster services, reduced wait times, more staff and improved information delivery will drive the biggest increase in overall satisfaction for consumers. For businesses, better communication, easier access to information and more efficient services will drive the biggest increase in overall satisfaction.</li> </ul>

## Summary of Key Findings in 2017 (2 of 2)

Theme	Key finding
Complaints Handling	<ul style="list-style-type: none"> <li>• <b>Key Finding 9a:</b> The average satisfaction of consumers whose complaints were handled well is marginally higher than that of businesses.</li> <li>• <b>Key Finding 9b:</b> The proportion of consumers stating that making a complaint was easy (7-10 out of 10) was 3% higher in 2017 than in 2016. The proportion of businesses stating that making a complaint was easy decreased by 8% in 2017.</li> </ul>
Comparison of Performance by Geography	<ul style="list-style-type: none"> <li>• <b>Key Finding 10a:</b> While customers from metropolitan areas continue to have the lowest satisfaction compared to other regions year on year, metropolitan is the only region to experience an increase across both consumers and businesses from 2016 to 2017.</li> <li>• <b>Key Finding 10b:</b> Expectation by region varies across consumer and business. Expectation is highest for consumers from regional NSW and expectation is highest for businesses located in rural NSW. The only significant change from 2016 to 2017 is for consumers from metropolitan regions.</li> </ul>
Perceptions and Adoption of Online Usage	<ul style="list-style-type: none"> <li>• <b>Key Finding 11a:</b> The channels most commonly used by customers to interact with services in 2017 are in person, online and telephone.</li> <li>• <b>Key Finding 11b:</b> Online experienced the biggest increase in average satisfaction (statistically significant) for consumers from 2016 to 2017.</li> <li>• <b>Key Finding 11c:</b> Consistent with 2015 and 2016, consumers are most satisfied with aspects relating to accurate content and security when dealing with services online.</li> <li>• <b>Key Finding 12a:</b> Customers who identified that they chose to go online have a higher average satisfaction with online services than those who are directed/prompted to go online or had no other option.</li> <li>• <b>Key Finding 12b:</b> Majority of customers use laptop and/or desktop computers to access online content.</li> <li>• <b>Key Finding 12c:</b> Consistent with 2015 and 2016, consumers are most likely to go online if information remains confidential and if it is easy to find information.</li> </ul>
Comparison of performance to other jurisdictions	<ul style="list-style-type: none"> <li>• <b>Key Finding 13a:</b> For consumers, NSW Government is the only jurisdiction which experienced a significant increase in both satisfaction and expectation from 2016 to 2017.</li> <li>• <b>Key Finding 13b:</b> For consumers, NSW Government has a positive 'brand' perception when compared to other industries, which is consistent across jurisdictions.</li> </ul>

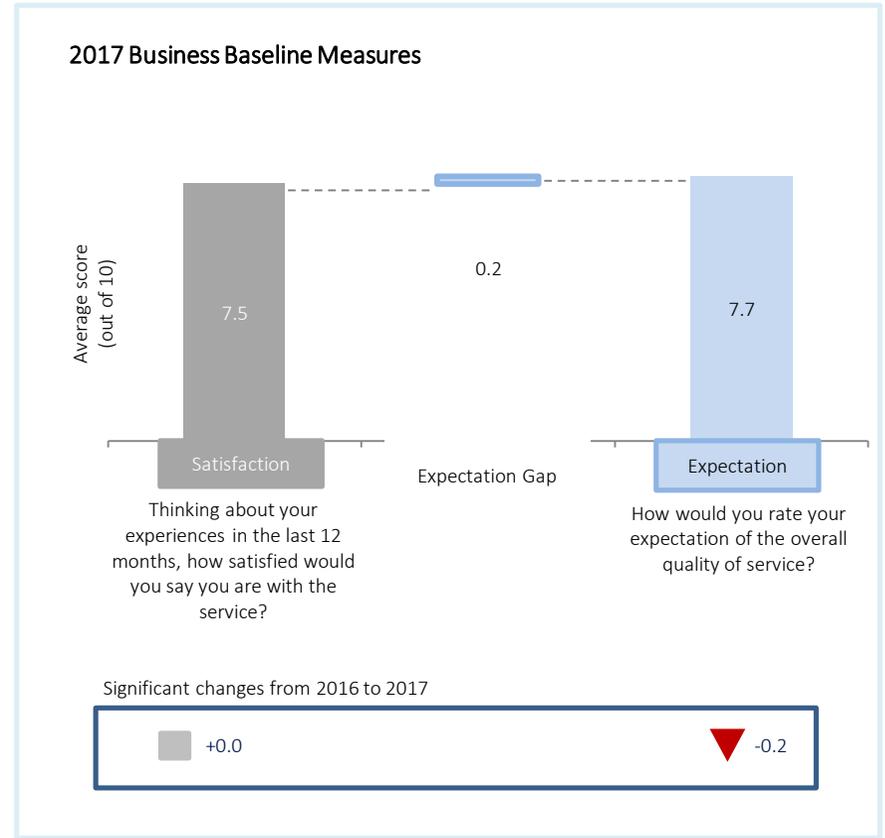
# 1. Satisfaction and Expectation

Average satisfaction and customer expectations for consumers have experienced a statistically significant increase since 2016. Although customer satisfaction for businesses has remained constant since 2016, there has been a significant decrease in the average expectation score for businesses.



Base: Consumers (n=4,013), Business (n=1,133)

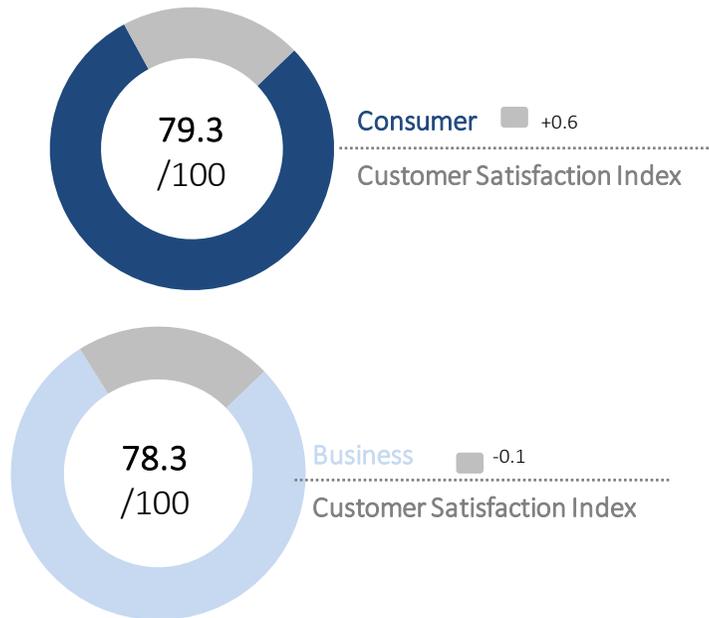
Legend: ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 ■ No significant change in avg. from 2016 (at 99% level of Confidence)  
 ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## 2. Customer Satisfaction Index and Comparison to Ideal

The NSW Customer Satisfaction Index increased for consumers by 0.6/100, and remained relatively stable (decreasing slightly by 0.1/100) for businesses from 2016 to 2017.

### 2017 Customer Satisfaction Index



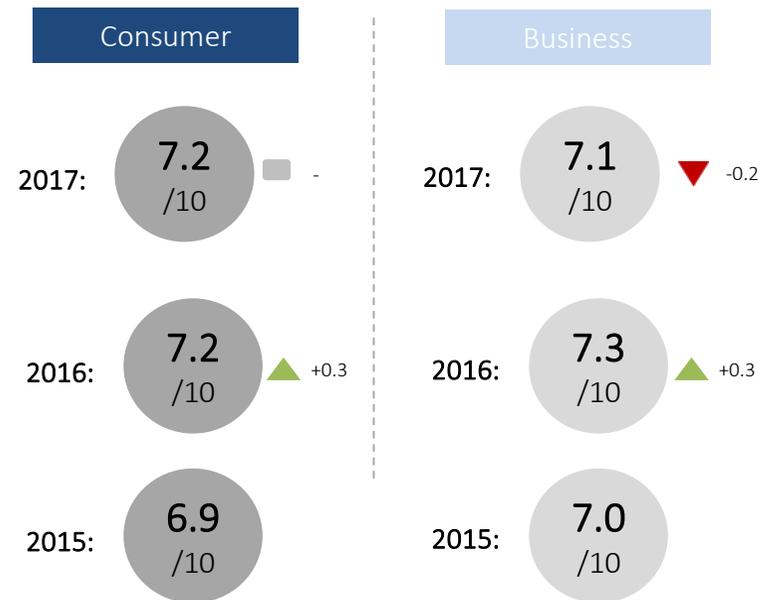
Base: Consumers (n=4,013), Business (n=1,133)

Legend:

- ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
- No significant change in avg. from 2016 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

Among consumers, the comparison between NSW services and an ideal service remained stable from 2016 to 2017. The gap decreased significantly among businesses.

### 2017 Comparison to an Ideal Service

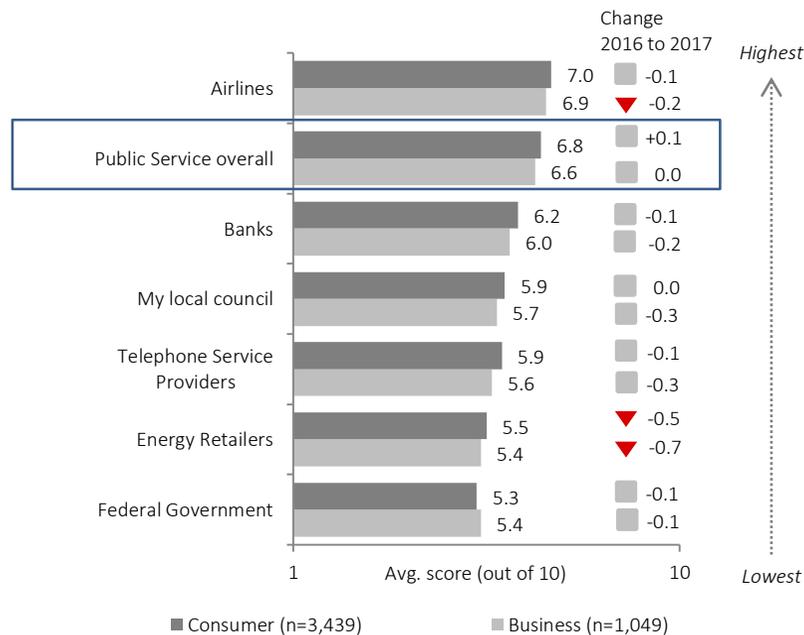


Please imagine an ideal service. How well do you think each service in NSW compares to that ideal service?

### 3. Perceptions of the NSW Public Sector ‘Brand’

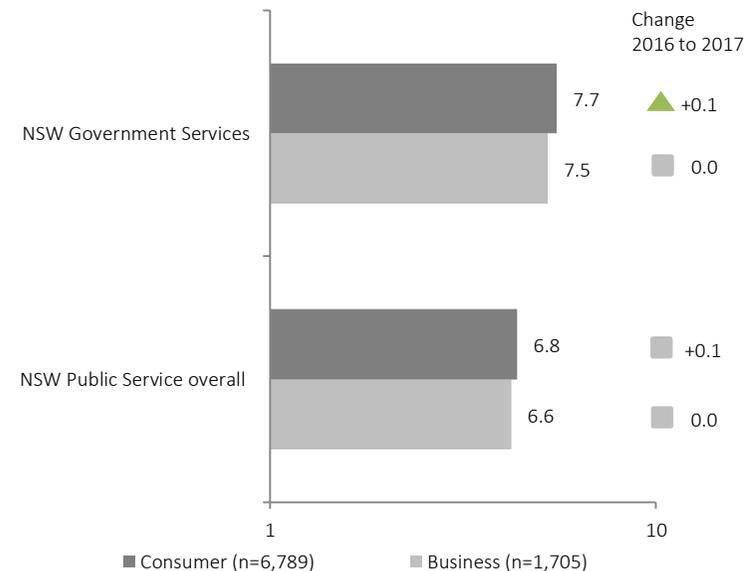
Customers’ perceptions of the NSW Public Service overall has increased slightly (not significantly) from 2016 to 2017, while scores for all other industries have decreased.

2017 Average Satisfaction with Industries in NSW



Satisfaction with the NSW Public Service ‘brand’ still remains lower than with NSW Government services overall with no statistically significant change over time.

2017 Comparison of NSW Government services and NSW Public Service ‘Brand’



Legend:

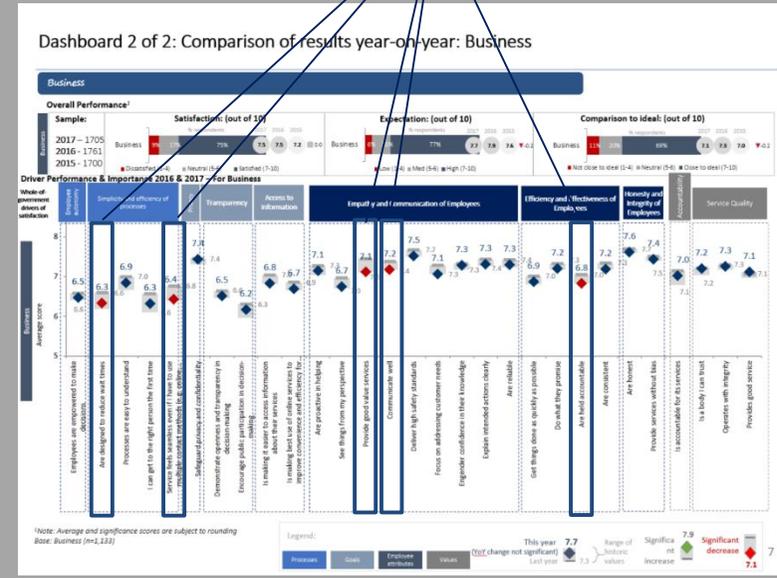
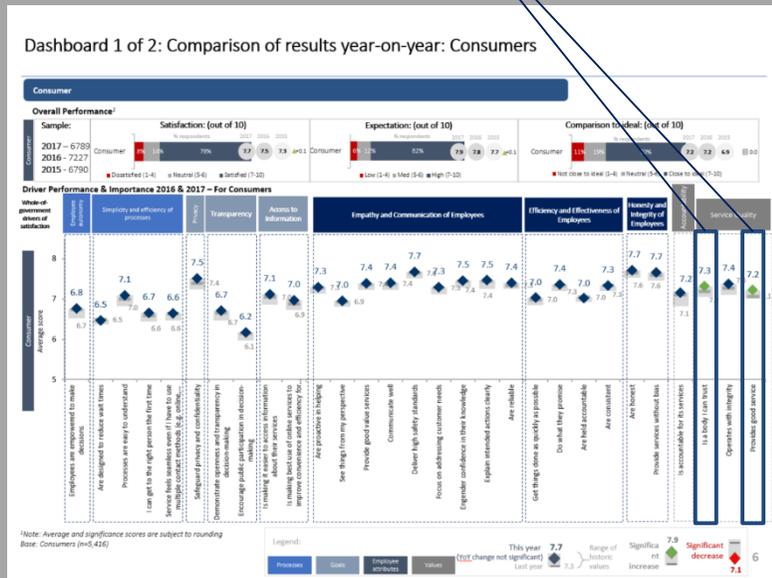
- ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
- No significant change in avg. from 2016 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

## 4. Attributes Driving Satisfaction Increases

A significant increase in satisfaction of service quality attributes from 2016 to 2017 is helping to drive improvements in overall satisfaction for consumers while significant declines in satisfaction of employee and process attributes for businesses are likely contributing to declines in business expectations.

Attributes relating to 'is a body I can trust' and 'provides good service' have seen a statistically significant increase in consumer satisfaction from 2016 to 2017.

Business satisfaction significantly declined from 2016 to 2017 for the attributes 'are designed to reduce wait times', 'service feels seamless', 'provide good value service', 'communicates well' and 'are held accountable'.

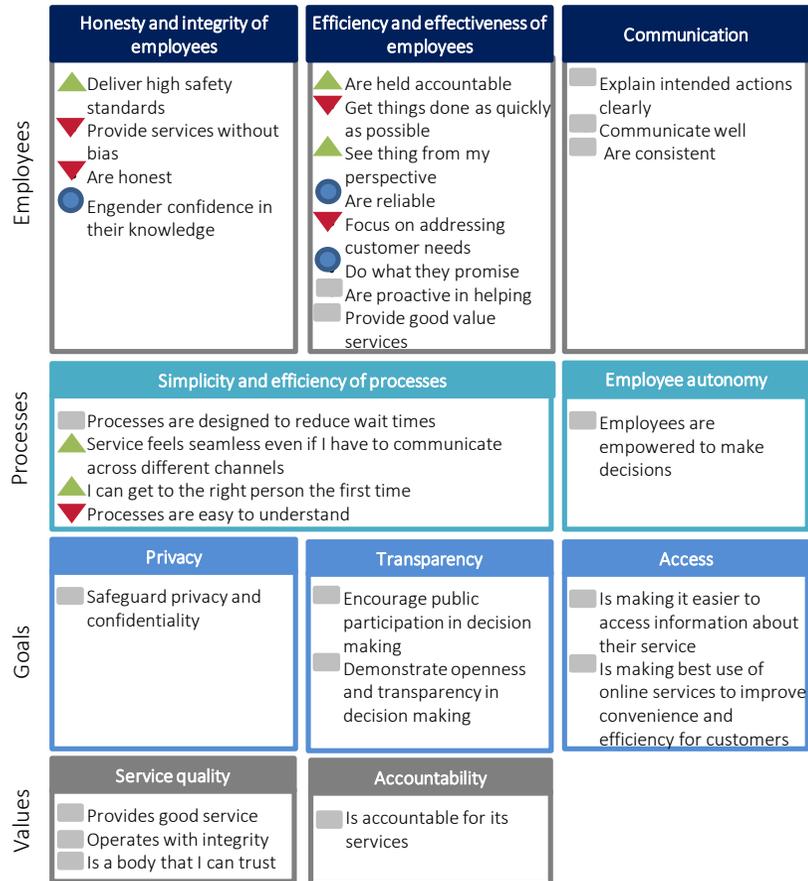


Base: Consumers (n=5,416), Business (n=1,133)

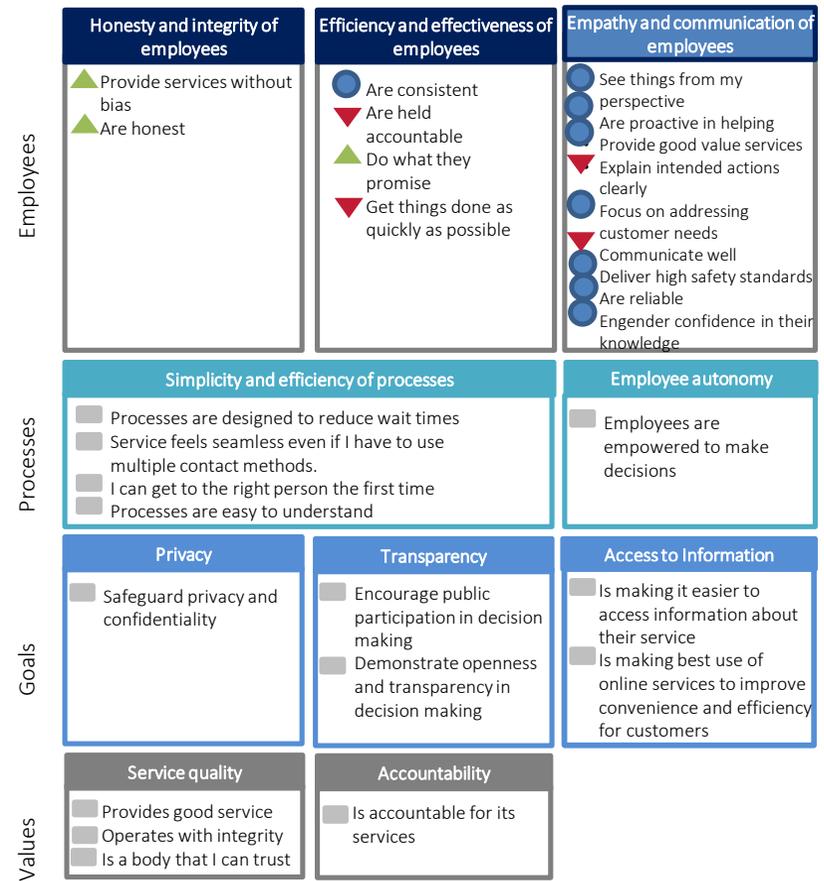
## 5. The Drivers of Customer Satisfaction

The groupings of drivers have slightly changed from 2016, with 'softer' employee attributes such as empathy and communication emerging as key drivers of satisfaction for consumers.

Drivers of customer satisfaction - 2016



Drivers of customer satisfaction - 2017



Legend:

- ▲ Increase in ranking within the same group since 2016 (based on factor loading)
- ▲ No change in ranking
- ▼ Decrease in ranking within the same group since 2016 (based on factor loading)
- Aligned to a new group in 2017

Employee attributes    Goals    Processes

## 6. Opportunities to Improve Overall Satisfaction

Focusing on improving 'access to information' and the 'efficiency and effectiveness of employees' will drive the biggest increase in overall satisfaction for NSW customers.

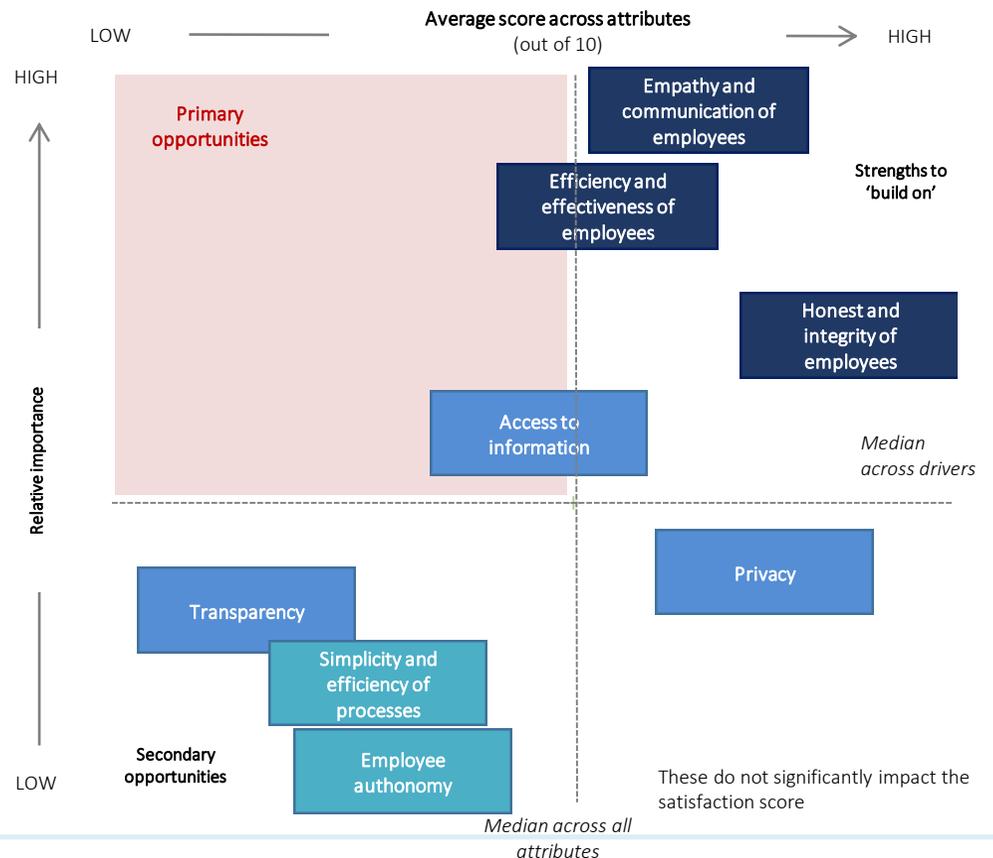
### 2017 Drivers of Satisfaction

- Efficiency and effectiveness of employees and access to information continue to have perceived lower performance and as such continue to be identified as priority areas to drive the biggest increase in satisfaction with NSW Government services overall.
- Transparency continues to be 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.
- Honesty and integrity of employees and privacy continue to be strengths 'to build on' across services as they are of high importance to consumers and their perceived performance is also higher than other drivers.
- Empathy and communication of employees is the most important driver and is identified as a strength 'to build on' as its performance is higher than all other drivers.

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

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

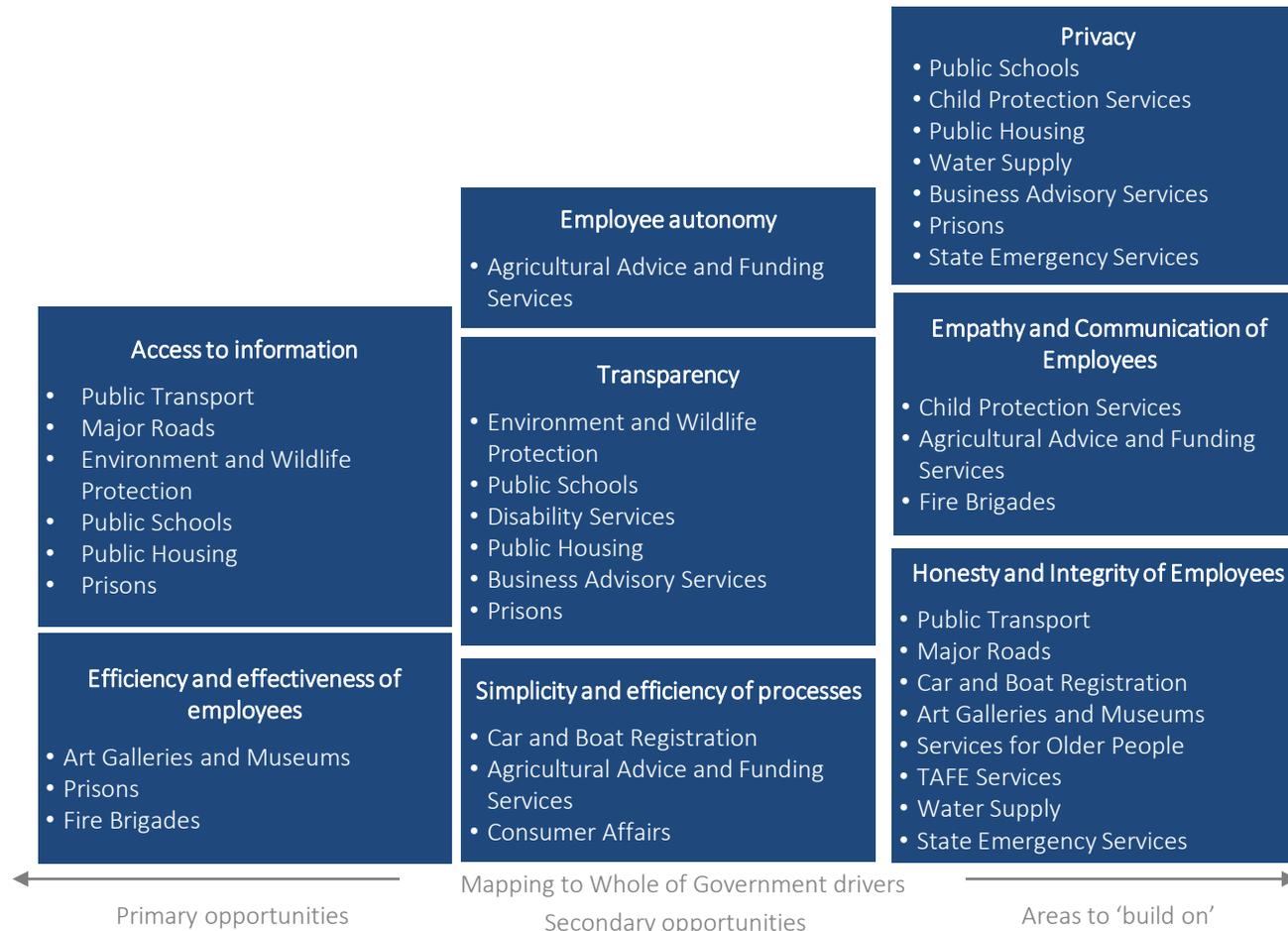
### Importance versus performance against each of the drivers of satisfaction 2017



## 7. Satisfaction Drivers Vary Across Services

The relative importance of satisfaction drivers vary across services. This implies a continued need for targeted service priorities within services to support Whole of Government outcomes.

### Services for which driver has emerged as a new primary opportunity area in 2017

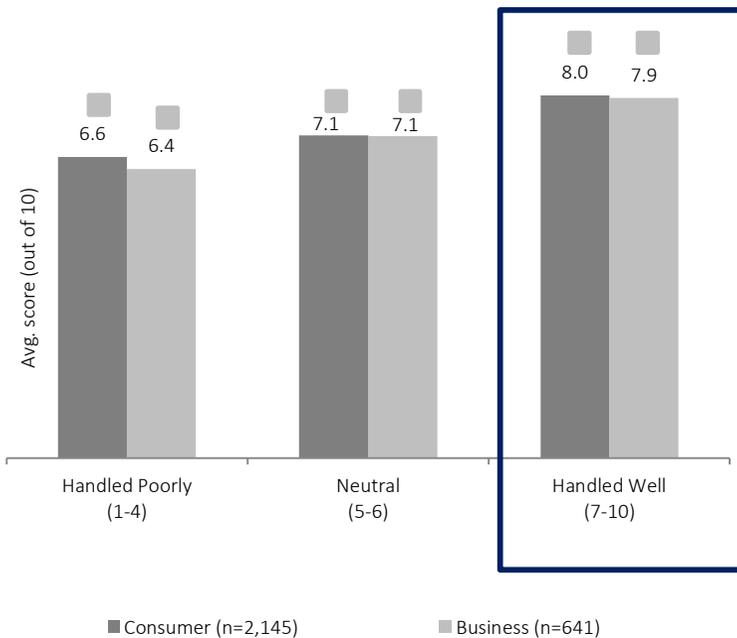




## 9. Impact of Complaints on Customer Satisfaction

The average satisfaction of consumers whose complaints were handled well is marginally higher than that of businesses.

### 2017 Complaint Handling Experience

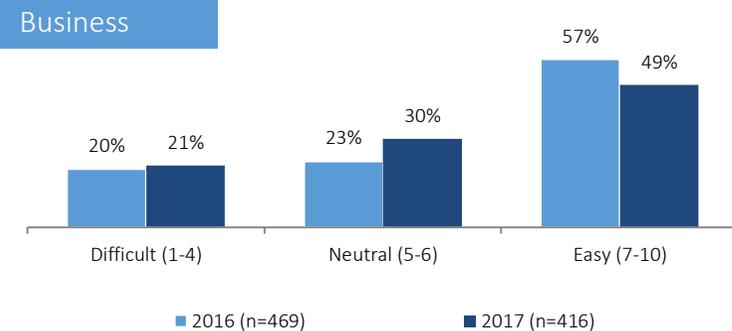
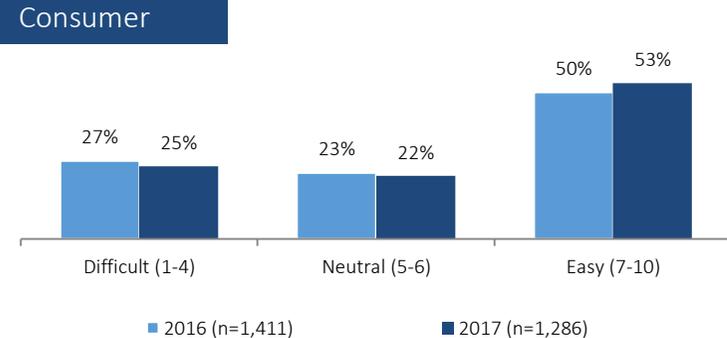


Base: respondents who had made a complaint

Legend:   
▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)   
■ No significant change in avg. from 2016 (at 99% level of Confidence)   
▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

The proportion of consumers stating that making a complaint was easy (7-10 out of 10) was 3% higher in 2017 than in 2016. The proportion of businesses stating that making a complaint was easy decreased by 8% in 2017.

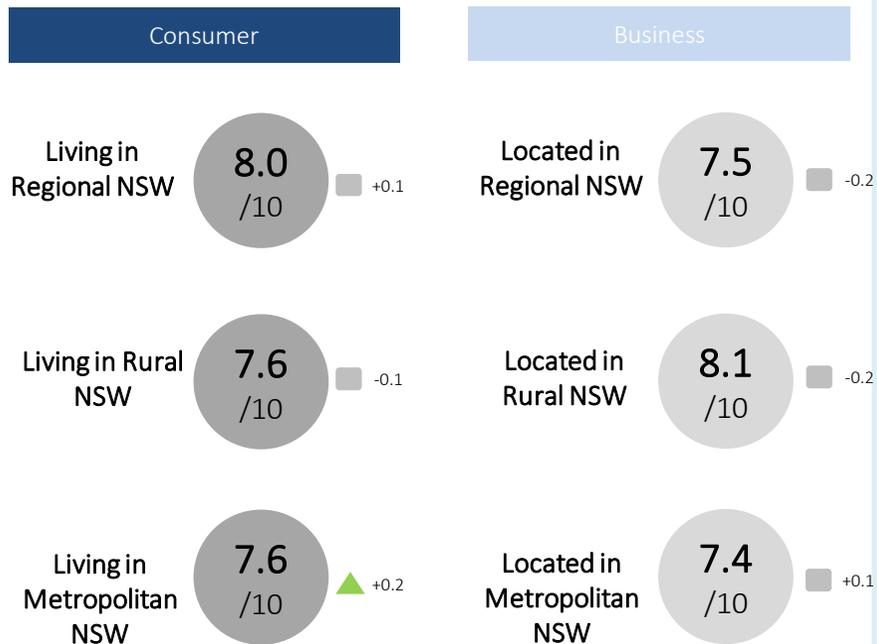
### 2017 Ease of Making a Complaint



## 10. Customer Satisfaction Varies by Geography

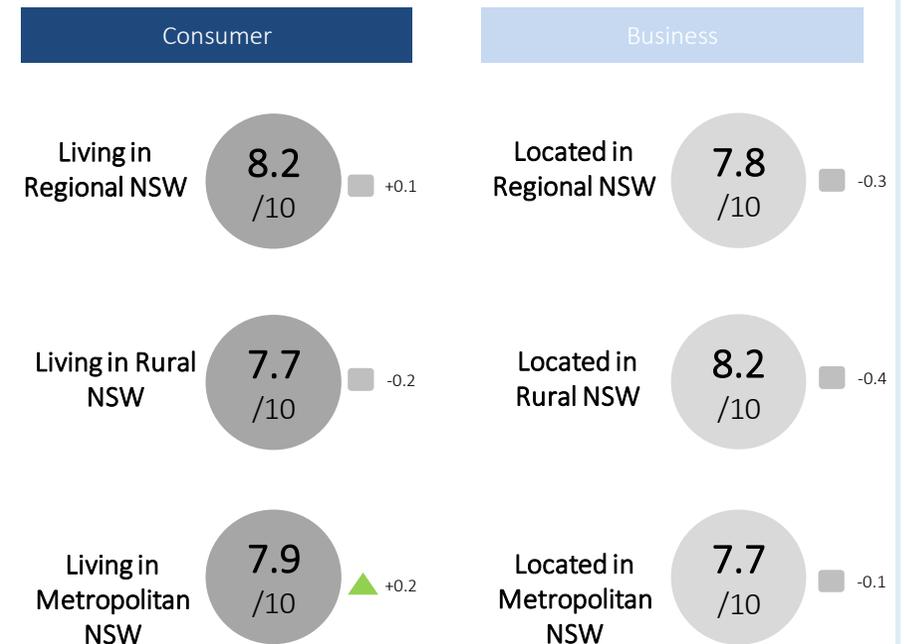
While customers from metropolitan areas continue to have the lowest satisfaction compared to other regions year on year, metropolitan is the only region to experience an increase across both consumers and businesses from 2016 to 2017.

### 2017 Satisfaction by Region



Expectation by region varies across consumer and business. Expectation is highest for consumers from regional NSW and expectation is highest for businesses located in rural NSW. The only significant change from 2016 to 2017 is for consumers from metropolitan regions.

### 2017 Expectation by Region



Legend:

-  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
-  No significant change in avg. from 2016 (at 99% level of Confidence)
-  Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

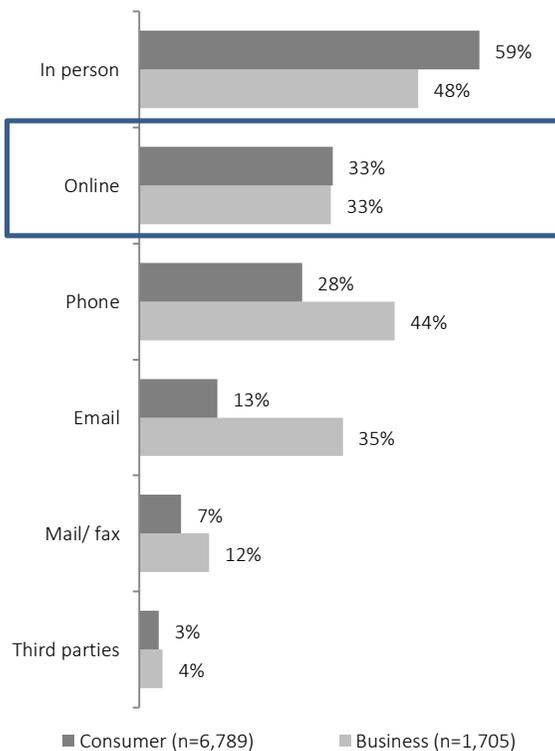
Base: Consumers (n=4,013), Business (n=1,133)

Source: Office of the Customer Service Commissioner, Customer Satisfaction Measurement Survey 2017

# 11. Adoption of Online Services and Resulting Impact on Customer Satisfaction

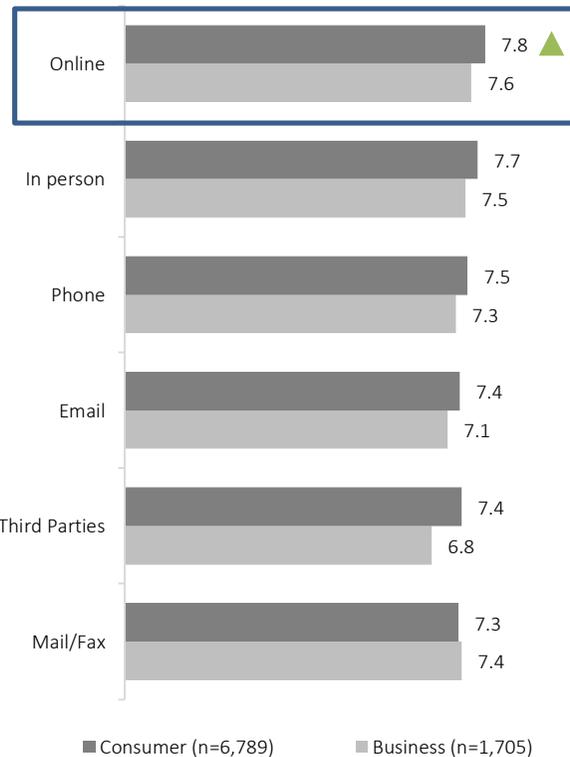
The most commonly used channels by customers to interact with services in 2017 are in person, online and telephone.

2017 Contact Methods Used<sup>1</sup>



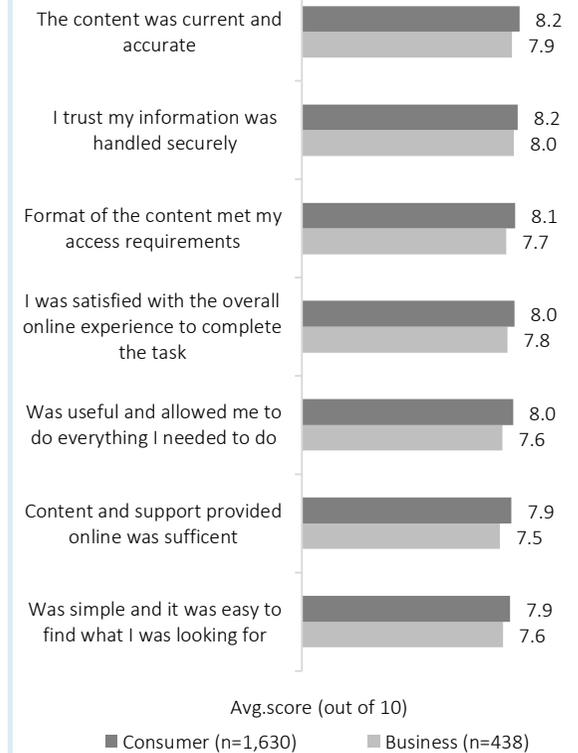
Online experienced the biggest increase in average satisfaction (statistically significant) across consumers from 2016 to 2017.

2017 Satisfaction by Contact Method



Consistent with 2015 and 2016, consumers are most satisfied with aspects relating to accurate content and security when dealing with services online.

2017 Satisfaction with Going Online

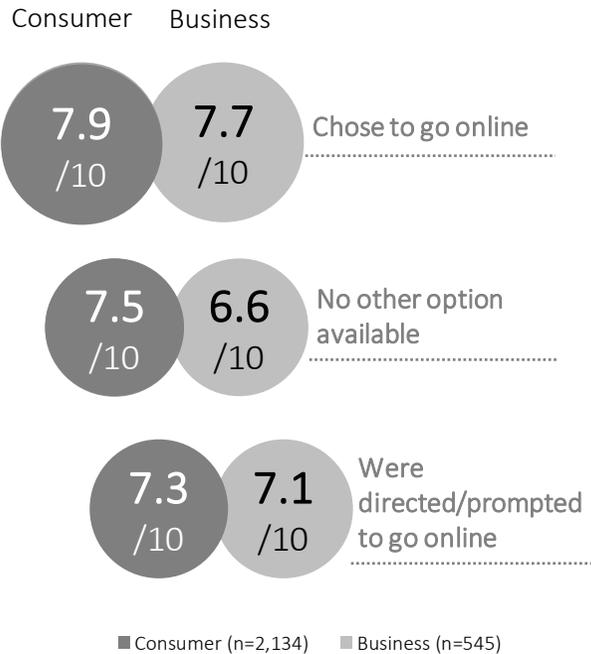


Legend: ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 ■ No significant change in avg. from 2016 (at 99% level of Confidence)  
 ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

## 12. Further Online Insights and Adoption

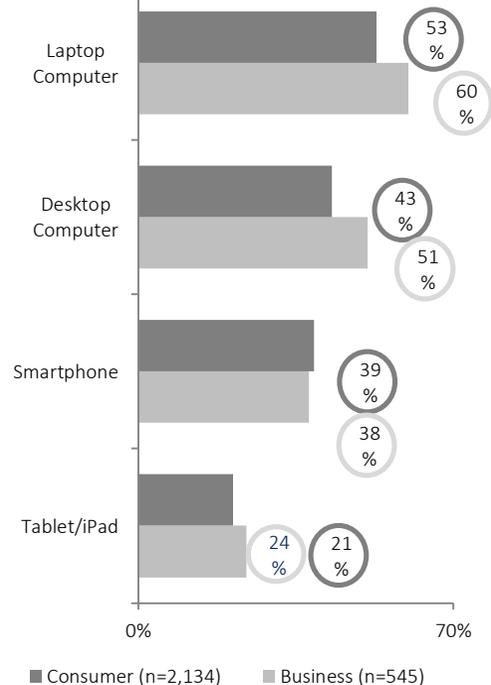
Customers who identified they chose to go online have a higher average satisfaction with online services than those who are directed/prompted to go online or had no other option.

### 2017 Satisfaction with Online Services



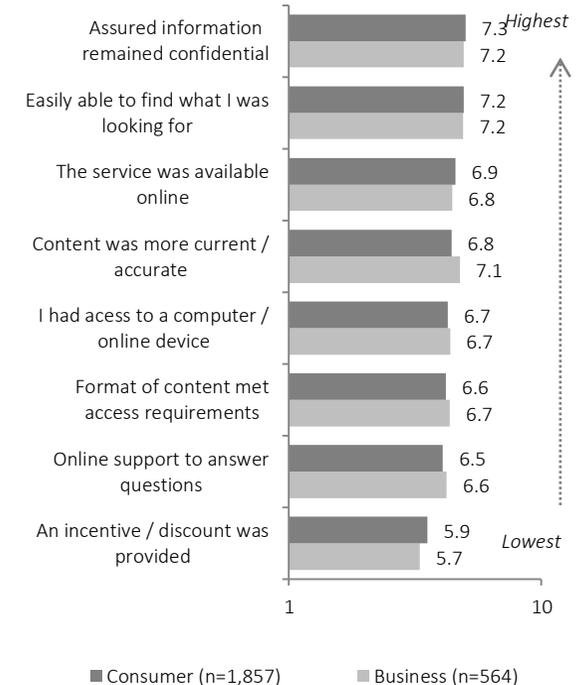
Majority of customers use laptop and/or desktop computers to access online content.

### 2017 Online Device Used<sup>1</sup>



Consistent with 2015 and 2016, consumers are most likely to go online if information remains confidential and if it was easy to find information.

### 2017 Likelihood to Go Online If...



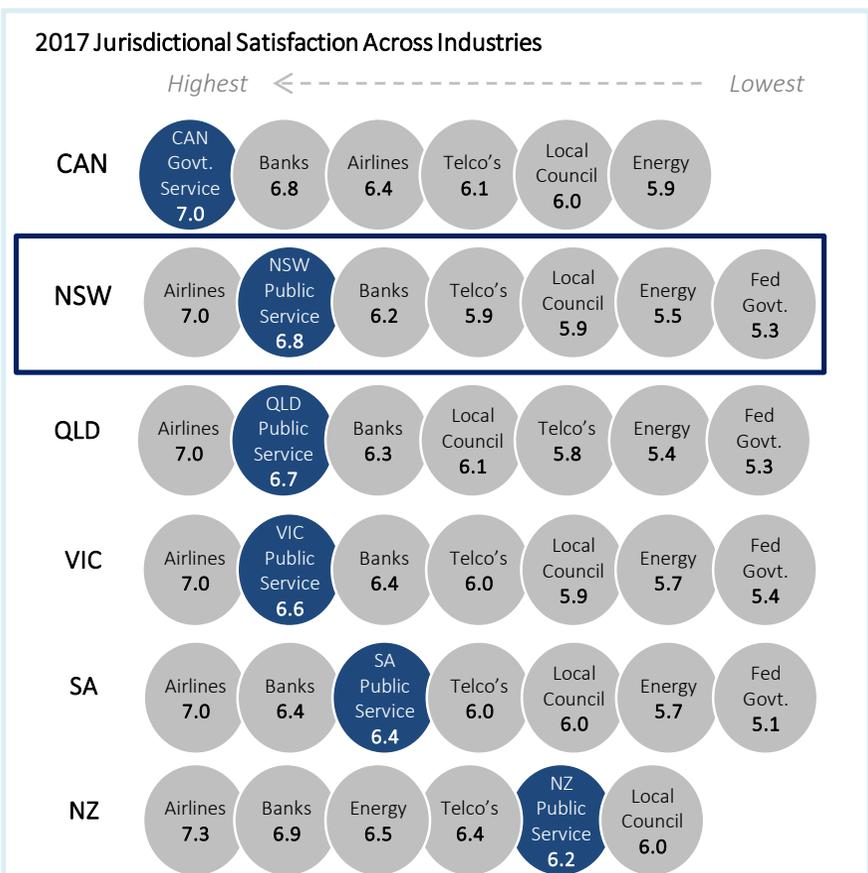
Legend: ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
■ No significant change in avg. from 2016 (at 99% level of Confidence)  
▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

<sup>1</sup>Note: respondents could select any number of options (multi-select)

### 13. Comparison of Top Line Performance Across Jurisdictions - Consumer

For consumers, NSW Government is the only jurisdiction which experienced a significant increase in both satisfaction and expectation from 2016 to 2017.

For consumers, NSW Government has a positive 'brand' perception when compared to other industries, which is consistent across jurisdictions.



Legend:   
▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)   
■ No significant change in avg. from 2016 (at 99% level of Confidence)   
▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

CAN (n=2,056), NSW (n= 4,013), QLD (n= 2,104), VIC (n=2,056), SA (n= 2,030), NZ (n= 2,028)

# Detailed Findings

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

2. Performance Against Customer Satisfaction Drivers - Key Findings 4, 5, 6, 7, 8

3. Complaints Handling - Key Finding 9

4. Comparison of Performance by Geography - Key Finding 10

5. Perceptions and Adoption of Online Usage - Key Findings 11, 12

6. Comparison of performance to other jurisdictions - Key Finding 13

## Overall Performance

### Key Findings Covered in this Section:

**Key Finding 1:** Average satisfaction and customer expectations for consumers have experienced a statistically significant increase since 2016. Although customer satisfaction for businesses has remained constant since 2016, there has been a significant decrease in the average expectation score for businesses.

**Key Finding 2a:** The NSW Customer Satisfaction Index increased for consumers by 0.6/100, and remained relatively stable (decreasing slightly by 0.1/100 for businesses from 2016 to 2017).

**Key Finding 2b:** Among consumers, the comparison between NSW services and an ideal service remained stable from 2016 to 2017. The gap decreased significantly among businesses.

**Key Finding 3a:** Customers' perceptions of the NSW Public Service 'brand' overall has increased slightly (not statistically significantly) from 2016 to 2017, while scores for all other industries have decreased.

**Key Finding 3b:** Satisfaction with the NSW Public Service 'brand' remains lower than with NSW Government services overall with no statistically significant change over time.

### Areas covered in this section

1. NSW Customer Satisfaction Index...p. 32
2. Customer Views on Satisfaction and Expectations .....p. 33
3. Performance of Services Compared to Expectations and Ideal Services .....p. 34
4. Difference in Consumer Satisfaction by demographics .....p. 35
5. Perceptions and Descriptors of the NSW Public Service 'brand' .....p. 37

### Summary Findings

- There has been an indicative improvement (not statistically significant) in the Customer Satisfaction Index in 2017 for both consumers and businesses.
- The overall satisfaction score has increased statistically significantly for consumers, and has remained stable for businesses
- Both consumer and business expectations have changed in 2017. Consumer expectations have increased statistically significantly by 0.1/10, while business expectations have decreased statistically significantly by 0.2/10.
- The average gap between satisfaction and expectation (satisfaction minus expectation) is -0.2 for both consumers and businesses.
- Qualitative research indicates that drivers of the declines in business expectations relate to recent experiences with processes and employees. Business customers increasingly want to be treated as clients rather than customers, with greater consultation and stronger client relationships, rather than purely a service delivery.
- Average satisfaction scores have significantly increased compared to 2016 for consumers across a range of demographics including females and metropolitan dwellers (both these groups also identified as having the biggest gap to expectation), older adults, full time workers and higher income earners.
- Consistent with 2016, businesses located in rural areas are more satisfied with the NSW Government services they interact with. While businesses located in metropolitan areas have seen an improvement in satisfaction (not statistically significant) since 2016, this region shows the biggest gap to expectation.
- Consistent with 2016, satisfaction with the NSW Public Service overall compares favourably with that of other industries. Satisfaction with NSW Government services remains greater than satisfaction with the NSW Public Service.
- Satisfaction with NSW Government services is higher amongst those who select positive words to describe the NSW Public Service overall than those who select negative descriptors.



## Customer Views on Satisfaction and Expectations

Overall satisfaction and expectations have increased significantly since 2016 for consumers but expectations decreased significantly for businesses.

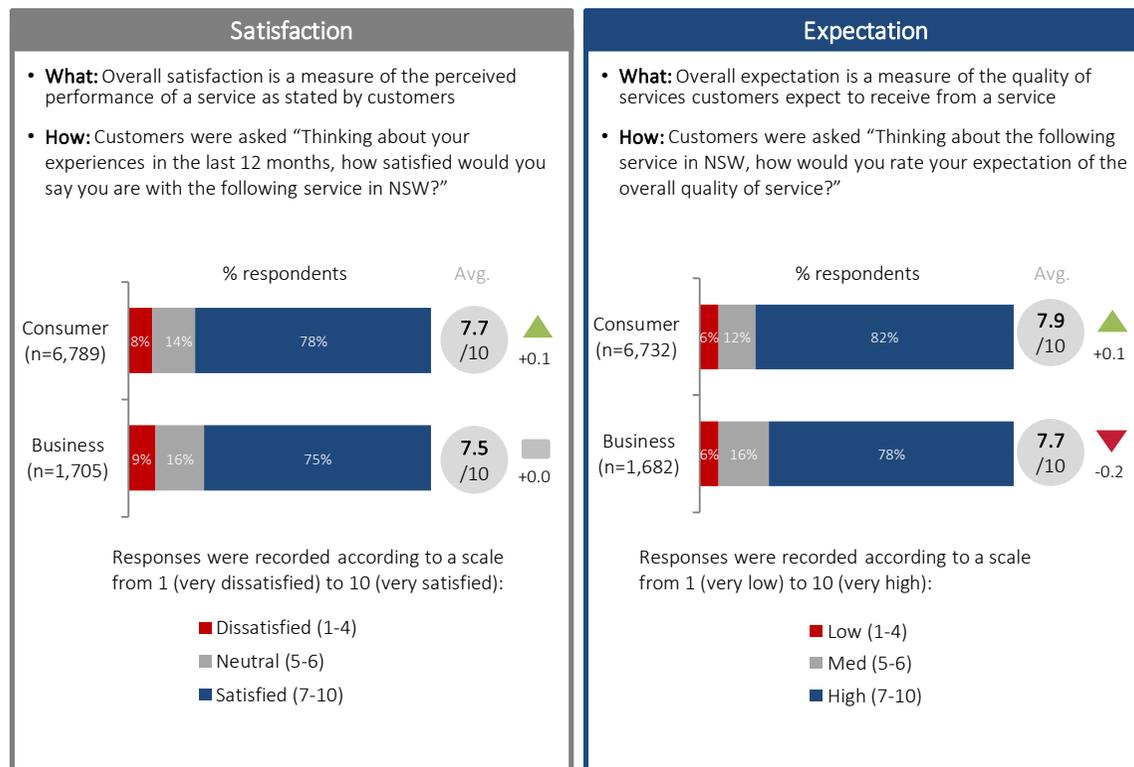
Satisfaction has increased statistically significantly by 0.1/10 for consumers, and remained stable for businesses (refer to Figure 1.3). Overall, 78% of consumers and 75% of businesses indicate they are satisfied with the NSW Government services they have had direct dealings with in the last 12 months.

Both consumer and business expectations have changed in 2017. Consumer expectations have increased statistically significantly by 0.1/10, while business expectations have decreased statistically significantly by 0.2/10.

While business expectations declined in 2017, overall expectations of NSW Government services remain high, with 78% of participants expecting a high quality of service. This is in line with business expectations of Government services in other jurisdictions included in the CSMS (see chapter 6 for further information on jurisdictional comparisons).

The decline in expectations among businesses was investigated in qualitative research conducted with business customers. See the following page for insights from focus groups.

Figure 1.3: NSW consumer and business satisfaction and expectation



*“it’s a government service, we’re paying for it and I expect them to be efficient [and] professional”*

*“[Government] should be setting the examples”.*

*“I expect timely turn around to process my enquiry/action and I expect a record of my transaction. I expect the least paper possible. I expect a consistent process”*



Source: qualitative research

Legend: Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## Performance of Services Compared to Expectations and Ideal Services

For consumers, comparison to ideal services remains stable in 2017 while for businesses, it has significantly (statistically) decreased by 0.2/10.

Satisfaction with the experience delivered by NSW Government services is lower than customers' expectations. The average gap between satisfaction and expectation (satisfaction minus expectation) is -0.2 for both consumers and businesses (refer to Figure 1.4).

There is also a gap between customers' experiences compared to their ideal service, with 70% of consumers and 69% of businesses agreeing that the service they received is close to their 'ideal' experience. This has remained stable among consumers and declined statistically significantly among businesses since 2017.

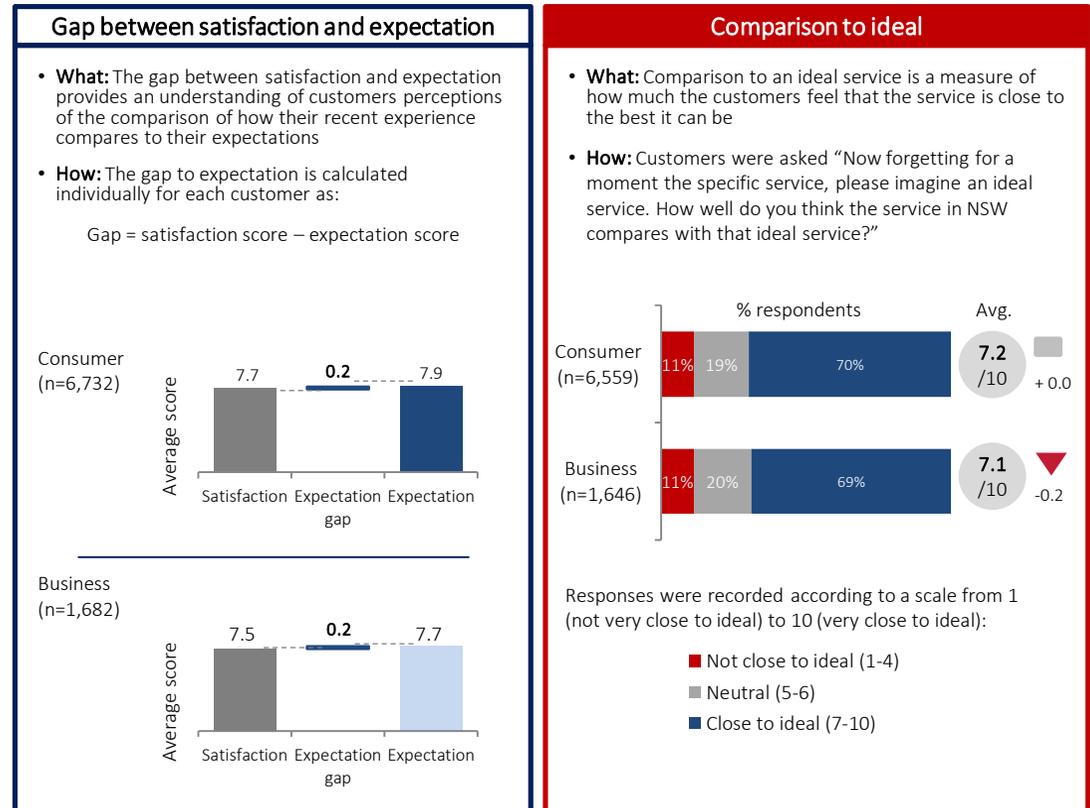
Findings from focus groups indicate that drivers of the declines in business' expectations and the gap to ideal service relate to recent experiences with:

- Processes: frustration stemming from difficulties locating the right contacts, forms not fit for purpose, inability to complete processes via one channel or online, lengthy wait times; and
- Employees: lack of case ownership or accountability, lack of documentation of interactions and a general (perceived) unwillingness to assist.

Qualitative research also revealed that business customers increasingly want to be treated as clients, expecting government services to support them in running their businesses to drive profit, rather than as merely 'customers'. They suggested this could be achieved via the provision of continuity in service by trained, knowledgeable and empowered staff, with dedicated case ownership, and flexibility in service, specifically with regard to contact methods available.

Legend: ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
■ No significant change in avg. from 2016 (at 99% level of Confidence)  
▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

Figure 1.4: Comparison of current NSW Performance to expectations and perceptions of an ideal service



“ ” *“It’s the question of whether Government treats businesses as a client or a supplier. Being a client is harder than being a supplier”*

Source: qualitative research



## Difference in Consumer Satisfaction by Customer Demographics

Average satisfaction scores have significantly increased compared to 2016 across a range of demographics including females and metropolitan dwellers (both these groups also identified as having the biggest gap to expectation), older adults, full time workers and higher income earners.

Demographic characteristics		Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)	Improvement in satisfaction since 2016	Decline in satisfaction since 2016
Consumer (n=4013)	Age	55 years +	18-24 years	18-24 years	▲ 55 years +	nil
	Region	Regional	Metropolitan Rural	Metropolitan	▲ Metropolitan	■ Rural
	Employment status	Retired	Unemployed	Student	▲ Employed full time	■ Self-employed and Employed on a casual basis
	Gender	Females	Males	Females	▲ Females	nil
	Income	All groups around 7.7	All groups around 7.7	All groups around 0.2	▲ \$150,001+	nil

Legend: ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 ■ No significant change in avg. from 2016 (at 99% level of Confidence)  
 ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## Difference in Consumer Satisfaction by Business Demographics

Consistent with 2016, businesses located in rural areas are more satisfied with the NSW Government services they interact with than those located in metropolitan areas. While businesses located in metropolitan areas have seen an improvement in satisfaction (not statistically significant) since 2016, this region shows the biggest gap to expectation.

Demographic characteristics		Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)	Improvement in satisfaction since 2016	Decline in satisfaction since 2016
Business (n=1133)	Business Size	200+	Sole proprietor	All groups around 0.2	Nil	■ Sole proprietor
	Region	Rural	Metropolitan	Metropolitan	■ Metropolitan	■ Regional
	Industry	Mining	Electricity, gas, water and waste services	Accommodation and food services	■ Mining	▼ Electricity, gas, water and waste services
	Revenue	\$500,001+	<\$50,000	<\$50,000	■ \$500,001+	■ <\$50,000

Legend:

- ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
- No significant change in avg. from 2016 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

# Perceptions of the NSW Public Service 'brand'

Consistent with 2016, satisfaction with the NSW Public Service overall compares favourably with that of other industries. Satisfaction with NSW Government services remains greater than satisfaction with the NSW Public Service.

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 Australian industries and public services to provide benchmarks.

Results show satisfaction with the NSW Public Service 'brand' compares favourably with that of other industries. Average satisfaction with the NSW Public Service 'brand' is 6.8 for consumers and 6.6 for businesses. This is behind satisfaction with airlines (average score of 7.0 for consumers and 6.9 businesses). Refer to Figure 1.5 for further detail.

There were no significant increases across any of the other included industries both for consumers and businesses, while satisfaction with energy retailers declined statistically significantly among both businesses and consumers. In addition, businesses were less favourable towards Airlines in 2017 (statistically significant decreases since 2016).

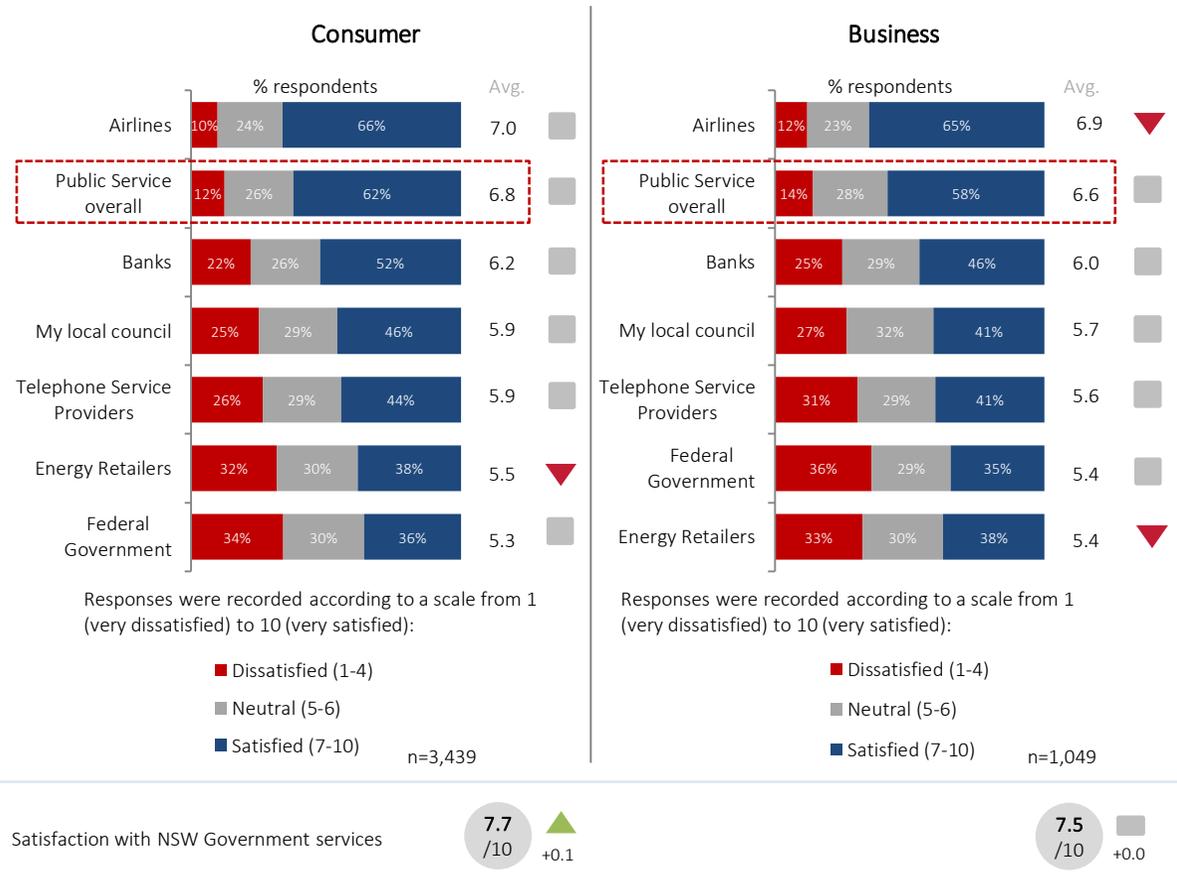
Consistent with 2016, satisfaction with the NSW Public Service 'brand' is significantly less than with NSW Government services overall (average score of 7.7 for consumers and 7.5 for businesses). This result suggests a disconnect between customers' experiences with service delivery and perceptions of the NSW Public Service 'brand' which are can be influenced by factors such as word-of-mouth and media.

Note: Figures displayed in graph may not sum to 100% due to rounding

Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

**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?"





## Customer Descriptors of the NSW Public Service 'brand'

Satisfaction with NSW Government services is higher amongst those who select positive words to describe the NSW Public Service overall than those who select negative descriptors.

Customers were asked to select the words that they would use to describe the NSW Public Service from a list of descriptors. The words most commonly selected by customers to describe the NSW Public Service overall are the positive descriptors of *'helpful'*, *'friendly'*, *'capable'*, and *'knowledgeable'* (refer to Figure 1.6).

Overall, consumers were more likely to choose positive words to describe the NSW Public Service than businesses.

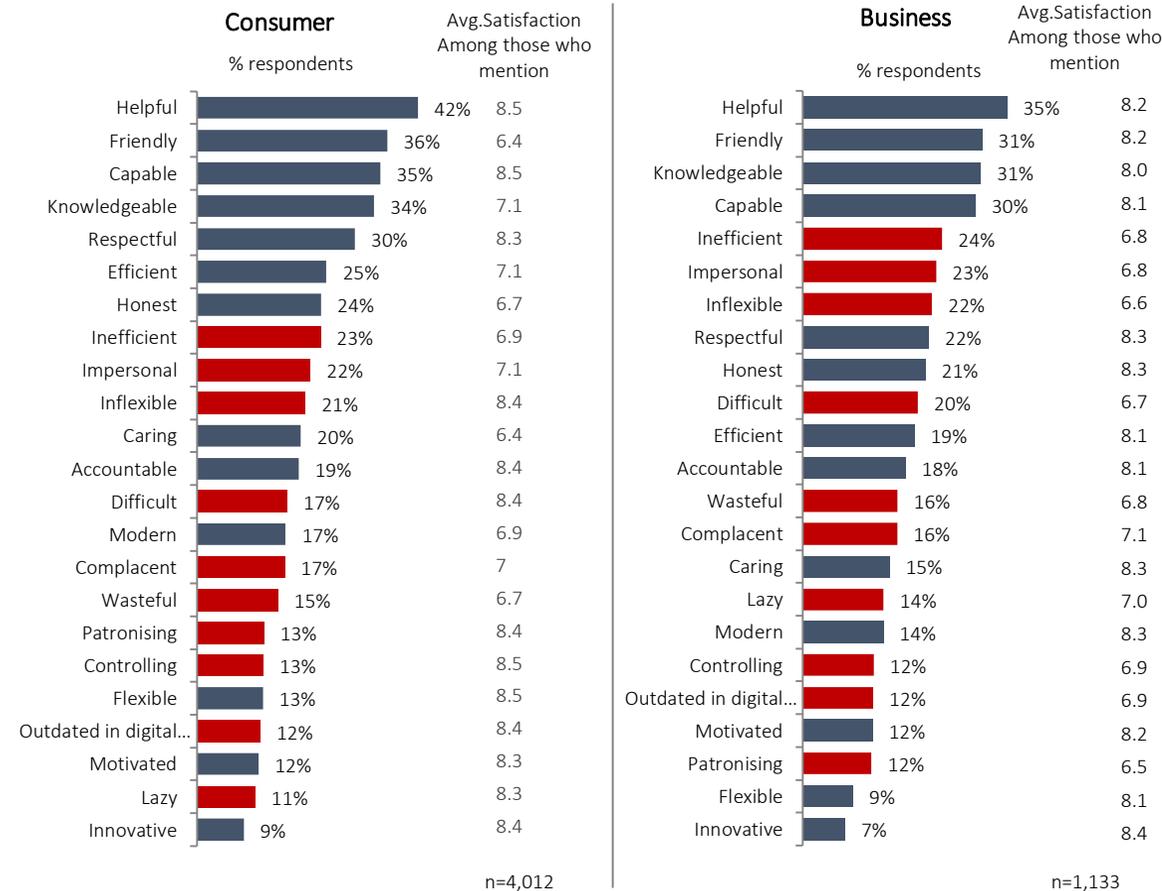
Very few customers identify the NSW Public Service to be *'innovative'* (9% of consumers and 7% of businesses) or *'flexible'* (13% of consumers and 9% of businesses).

Satisfaction scores are lowest amongst consumers who selected *'lazy'* or *'difficult'* (average satisfaction 6.4). Satisfaction is lowest among businesses who selected *'patronising'* (average satisfaction 6.5) and *'inflexible'* (satisfaction 6.6). This is illustrative of the relationship between negative perceptions of the NSW Government Public Service brand and dissatisfaction with NSW Government services.

Among consumers, there has been little change since 2016 in the way that consumers describe the NSW Public Service. There has however been slight shifts in the way that businesses describe the NSW Public Service, indicating that brand perceptions may be changing among these customers. For example, *'respectful'* (down 4% to 22% in 2017 amongst businesses) was in the top 5 in 2016, but has been replaced by *'inefficient'* in 2017 (24% - no change since 2016).

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

2. Performance Against Customer Satisfaction Drivers - Key Findings 4, 5, 6, 7, 8

3. Complaints Handling - Key Finding 9

4. Comparison of Performance by Geography - Key Finding 10

5. Perceptions and Adoption of Online Usage - Key Findings 11, 12

6. Comparison of performance to other jurisdictions – Key Finding 13

## Performance Against Customer Satisfaction Drivers

### Key Findings Covered in this Section:

- **Key Finding 4:** A significant increase in satisfaction of service quality attributes from 2016 to 2017 is helping to drive improvements in overall satisfaction for consumers while significant declines in satisfaction of employee and process attributes for businesses are likely contributing to declines in business expectations.
- **Key Finding 5:** The groupings of Whole of Government drivers have slightly changed from 2016, with ‘softer’ employee attributes such as empathy and communication emerging as a key driver of satisfaction for consumers.
- **Key Finding 6:** Focusing on improving ‘access to information’ and the ‘efficiency and effectiveness of employees’ will drive the biggest increase in overall satisfaction for NSW customers.
- **Key Finding 7:** The relative importance of satisfaction drivers vary across services. This implies a continued need for targeted service priorities to support Whole of Government outcomes.
- **Key Finding 8:** Faster services, reduced wait times, more staff and improved information delivery will drive the biggest increase in overall satisfaction for consumers. For businesses, better communication, easier access to information and more efficient services will drive the biggest increase in overall satisfaction.

### Areas covered in this section

1. Drivers of Customer Satisfaction.....p. 41
2. Opportunities to Improve Overall Satisfaction .....p. 43
3. Customer Views on NSW Government Performance Attributes and by demographics for each.....p. 44

### Summary Findings:

- Statistical analysis of the drivers of overall satisfaction with NSW Government services reveals that perceptions of employees, followed by access to information, have the greatest impact on overall customer satisfaction.
- The groupings of drivers have slightly changed from 2016, with ‘softer’ employee attributes such as empathy and communication emerging as key drivers of satisfaction for consumers.
- In assessing the importance versus performance of each of the drivers of satisfaction for 2017 it is clear that focusing on improving ‘access to information’ and the ‘efficiency and effectiveness of employees’ will drive the biggest increase in overall satisfaction for NSW customers.
- Consumer perceptions of attributes relating to NSW Government employees have remained stable since 2016, with no significant changes. For businesses, however, most attributes relating to employees have declined since 2016, with a few - ‘communicate well’, ‘provide good value services’ and ‘focus on addressing customer needs’ - experiencing a statistically significant decline. These three attributes all relate to ‘empathy and communication of employees’ – the most important driver of satisfaction in 2017.
- In regards to attributes relating to values, both consumers and businesses are most positive about the performance of NSW Government services against the values of integrity and trust.
- NSW Government service processes were rated highest for ‘processes are easy to understand’ (average score of 7.1 for consumers and 6.9 for 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 6.3 for businesses).
- In regards to attributes relating to goals, customers are most positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ however fewer customers agree that NSW Government services ‘encourage public participation in decision making’.

Source: Office of the Customer Service Commissioner, Customer Satisfaction Measurement Survey 2017

# The Drivers of Customer Satisfaction

Perceptions of NSW service employees are the most important drivers of satisfaction, followed by goals and processes.

Statistical analysis of the drivers of overall satisfaction<sup>1</sup> with NSW Government services reveals that perceptions of employees, followed by access to information, have the greatest impact on overall customer satisfaction.

Employee attributes relating to empathy, communication, efficiency, effectiveness, honesty and integrity are the most important drivers of satisfaction with NSW Government services. These employee attributes are followed by goals relating to access to information, privacy and transparency, and processes relating to customer service (simplicity and efficiency of processes and employee autonomy in serving customers).

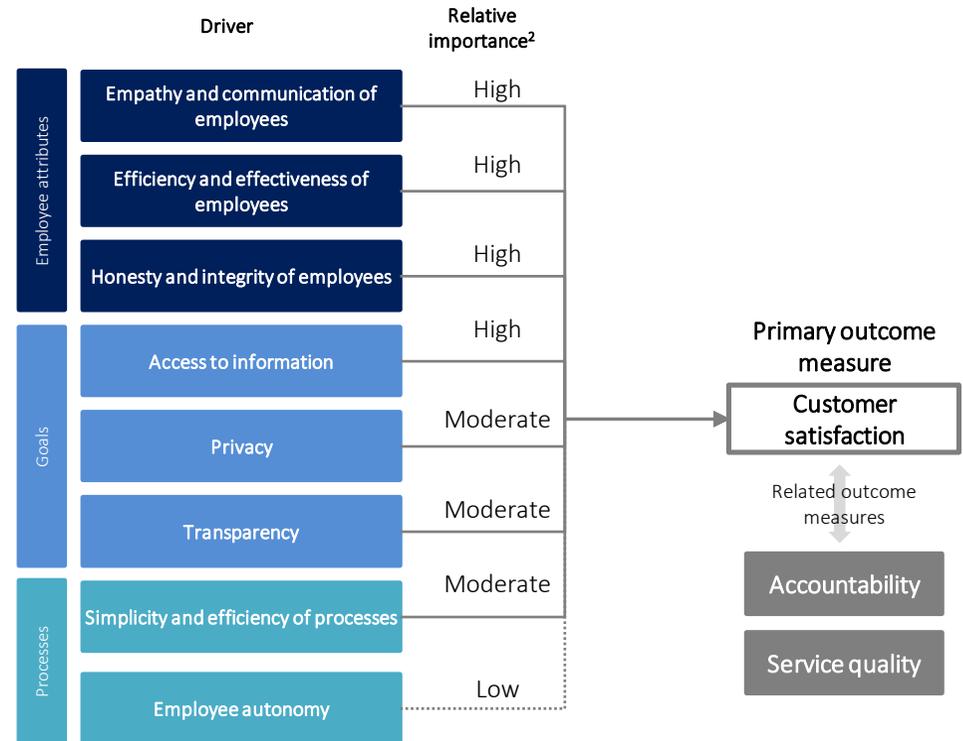
While quantitative data indicates that ‘softer’ employee attributes such as empathy and communication of employees are key drivers of satisfaction, verbatim customer comments within the CSMS survey in 2017 focused on process and efficiency related improvements such as greater efficiency, reduced wait times, more staff, increased availability of staff, and better access to information.

This dichotomy is not unusual and represents the contrast between stated importance (what customers ‘say’ is important to them), and latent or subconscious drivers of satisfaction (what will actually make a baseline difference to satisfaction).

Stated drivers are important aspects of service delivery as they are the ‘basic’ elements of customer expectations without which customer satisfaction targets cannot be met.

Latent drivers, however, are those elements of service delivery which, when offered to customers, will deliver to higher customer expectations, or provide service over and above expectation and may ‘delight’ customers.

Figure 2.1: Relative importance of drivers of satisfaction with NSW Government services



<sup>1</sup>Note that analysis to identify drivers has been performed against the overall satisfaction measure. As overall satisfaction is highly correlated with the Customer Satisfaction Index (correlation of 0.94) these results can be taken to be indicative of the importance of drivers for the Customer Satisfaction Index. To ensure consistency and comparability, the data collection and analyses have been performed using the same approach as 2016.

<sup>2</sup>Note: Calculation of drivers is based on the statistical analysis of drivers against satisfaction. Hierarchy represents the relative ‘importance’ of factors on overall satisfaction.

<sup>3</sup>Analysis displayed is based on consumer data however similar results are observed for businesses.

# The Drivers of Customer Satisfaction

The groupings of drivers have slightly changed from 2016, with ‘softer’ employee attributes such as empathy and communication emerging as key drivers of satisfaction for consumers.

Figure 2.2 Drivers of customer satisfaction - 2016

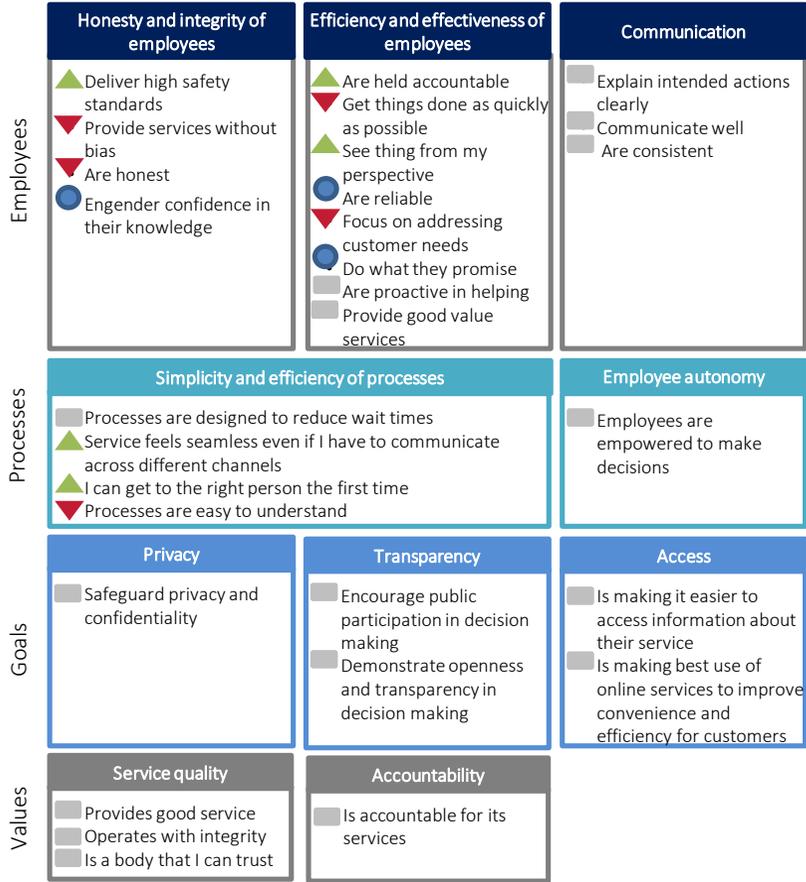
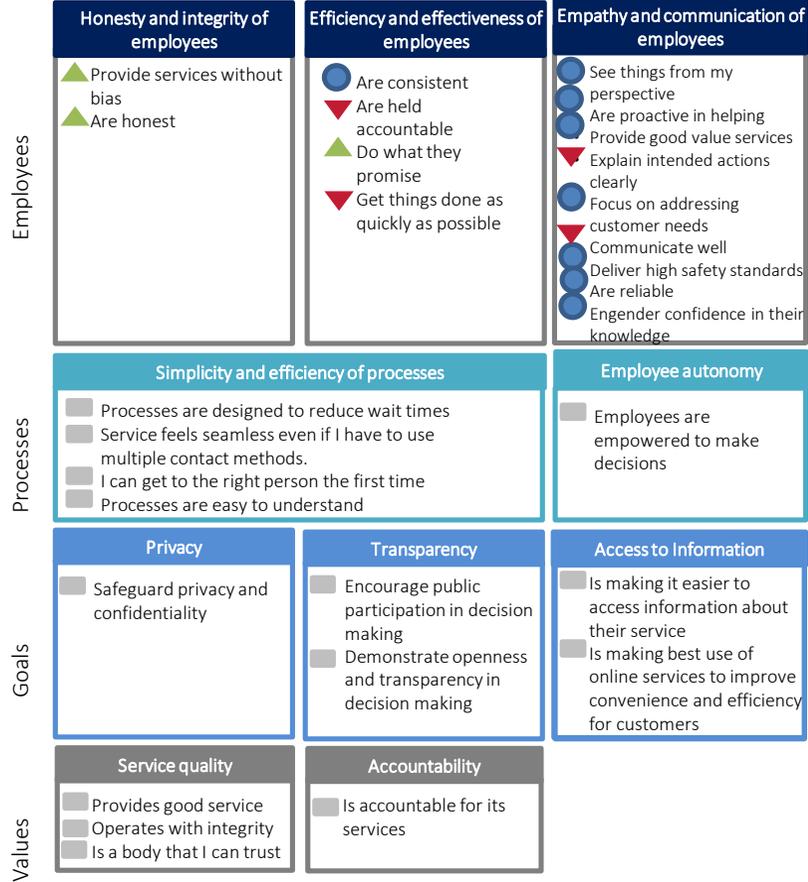


Figure 2.3 Drivers of customer satisfaction - 2017



Legend: ▲ Increase in ranking within the same group since 2016 (based on factor loading)  
 ■ No change in ranking  
 ▼ Decrease in ranking within the same group since 2016 (based on factor loading)  
 ● Aligned to a new group in 2017

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



## Opportunities to Improve Overall Satisfaction

Focusing on improving 'access to information' and the 'efficiency and effectiveness of employees' will drive the biggest increase in overall satisfaction for NSW customers.

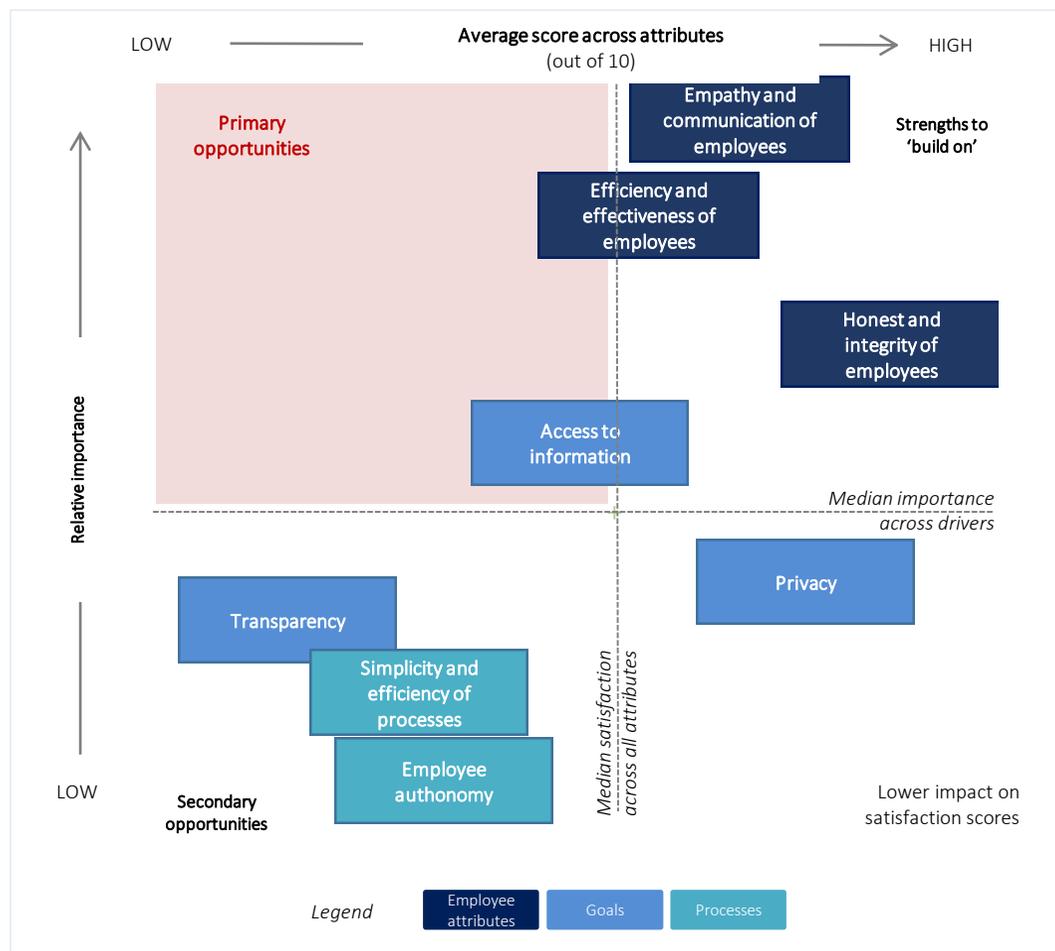
The Whole of Government Key Primary Opportunity Areas (KPOAs) allow understanding of high level drivers of satisfaction to inform action plans and monitor progress of on-going improvement plans.

The efficiency and effectiveness of employees is identified as a Whole of Government KPOA to drive an increase in satisfaction with NSW Government services. Attributes include being held accountable, getting things done as quickly as possible, consistency of service and delivering on promises. Performance of these attributes is relatively lower than other employee KPOA's relating to empathy, communication, honesty and integrity.

Access to information is also identified as a Whole of Government KPOA, with improvements in the ease of access to information about services, and better use of online services having greater impact on overall satisfaction with NSW Government services.

'Softer' employee attributes such as empathy, honesty and integrity of employees are relative strengths to build on. As KPOAs, these areas will have the greatest impact on overall satisfaction and with perceptions relatively higher than other attributes, further strengthening performance in these areas will have a positive impact on overall satisfaction.

Figure 2.4 2017 Whole of Government Key Primary Opportunity Areas<sup>2</sup> (KPOAs): Importance Versus Performance Against the Drivers of Satisfaction



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

<sup>2</sup>Note: Calculation of drivers is based on the statistical analysis of drivers against satisfaction. Hierarchy represents the relative 'importance' of factors on overall satisfaction.



# Customer Views on NSW Government Performance against Employee Attributes

Consumer perceptions of NSW Government employees are relatively high and have remained stable since 2016. Business' perceptions of NSW Government employees in regards to communication, value and customer focus have declined since 2016, although scores remain above 7/10 in these areas.

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

On most attributes relating to employees, NSW Government services are perceived relatively positively, with scores above 7 out of 10 for both businesses and consumers.

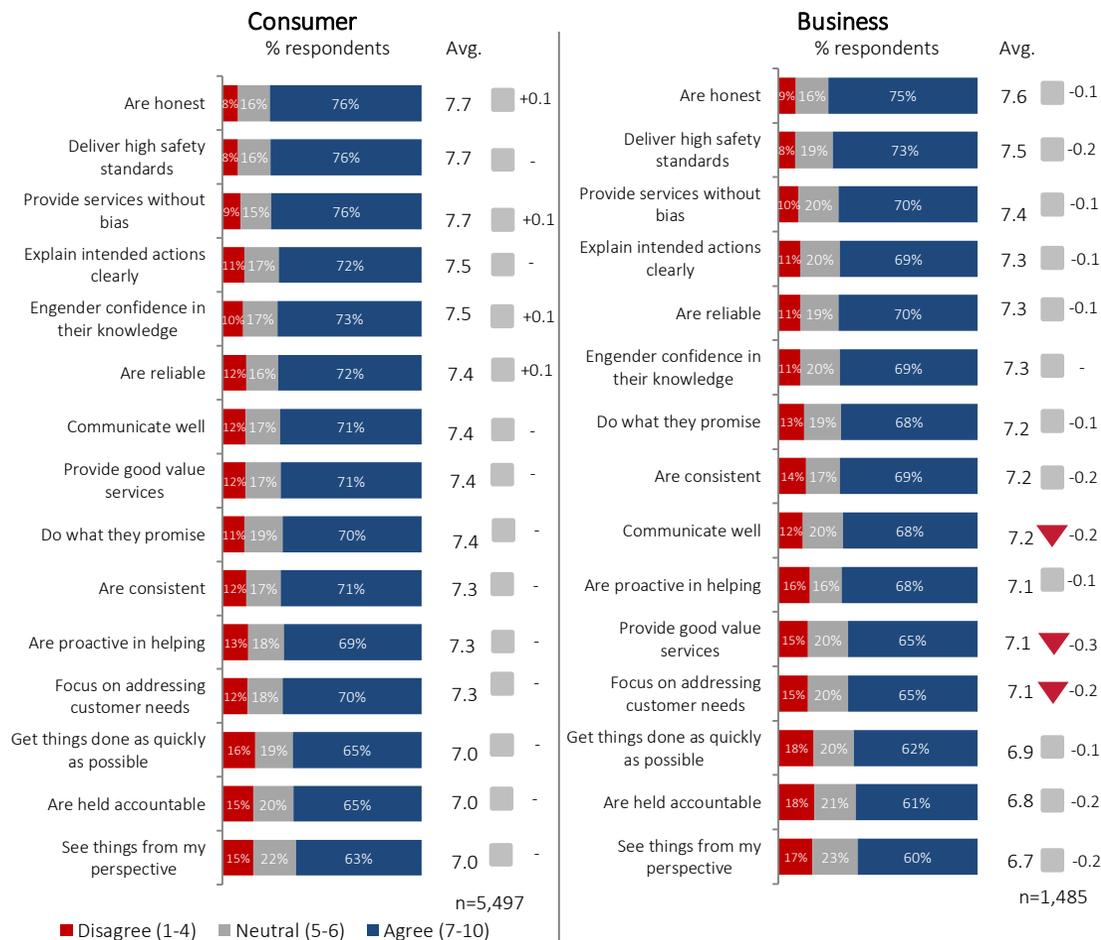
Consumer perceptions of NSW Government employees have remained stable since 2016, with no significant changes.

For businesses, most attributes relating to employees have declined since 2016, with a few - 'communicate well', 'provide good value services' and 'focus on addressing customer needs' - experiencing a statistically significant decline of 0.2 out of 10. These three attributes all relate to 'empathy and communication of employees' – an area of high impact for satisfaction.

Qualitative research with businesses emphasised the need for a workplace culture shift within the NSW Government to drive business customer satisfaction. Business customers wanted to see a culture of inspiring leadership which encourages staff to want to work better, provides quality training so that staff are empowered to make decisions and have the flexibility to operate outside standard procedures if necessary, and establish staff accountability so that staff learn from their mistakes and are encouraged to, and rewarded for, taking initiative.

**Figure 2.5: 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?"



Responses were recorded according to a scale from 1 (strongly disagree) to 10 (strongly agree)  
 Figures may not sum to 100% due to rounding



## Differences in Customer Views on Performance of Employee Attributes by Demographics

Older consumers, retired consumers, those living in regional areas or those on lower and middle incomes are more positive in their views of NSW Government services employees. Among businesses, those in regional and rural areas or those with higher revenue are more positive in their views of NSW Government services employees.

Consumer	Satisfaction with NSW Government employees above the NSW average	Satisfaction with NSW Government employees below the NSW average
Age	55 years +	Under 55 years
Region	Regional	Metropolitan Rural
Employment status	Retired	Employed full time Employed on a casual basis Student Unemployed/not working Self-employed Employed part time
Gender	No major difference	No major difference
Income	Up to \$150,000	Over \$180,000

Business	Satisfaction with NSW Government employees above the NSW average	Satisfaction with NSW Government employees below the NSW average
Business Size	2-20 people 200 people+	Sole proprietor
Region	Regional Rural	Metropolitan
Industry	Mining Manufacturing Wholesale trade Administrative and support services Agriculture, forestry and fishing Public administration and safety Arts and recreation services	Electricity, gas, water and waste services Construction Retail trade Accommodation and food services Transport, postal and warehousing Education and training Health care and social assistance
Revenue	Over \$50,000 <sup>1</sup>	Up to \$50,000

Note: This analysis is for profiling purposes and is based on performance on each attribute compared to the NSW average for that attribute. Statistical significance not determined.

# Customer Views on Performance of NSW Government services Value Attributes

Both consumers and businesses are most positive about the performance of NSW Government services against the values of integrity and trust.

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

High performance of NSW Government services against the values of integrity and trust aligns with strong business and consumer perceptions of NSW Government services against the honesty of employees (employee attribute of 'are honest'), and the goal attribute of 'safeguard privacy and confidentiality.'

Businesses and consumers were slightly less positive in their perceptions of the performance of NSW Government services against the values of 'accountability' and 'provide good services' (average scores of 7.2 for consumers and 7.1 for businesses), which is consistent with the lower ratings for accountability of NSW Government employees (employee attribute of 'are accountable').

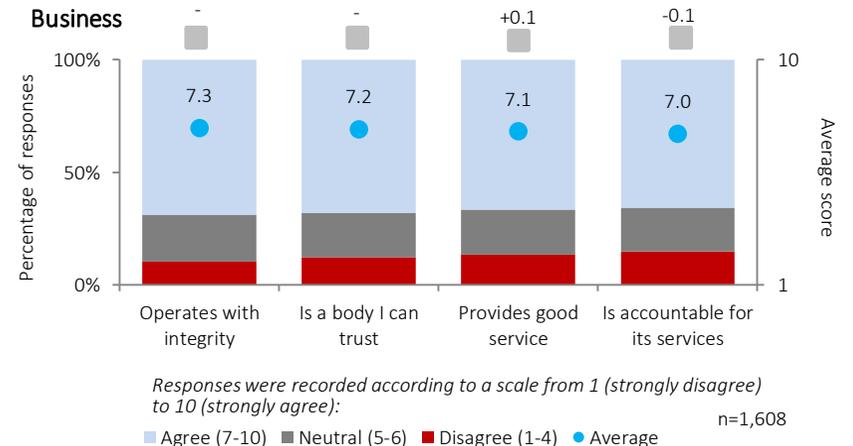
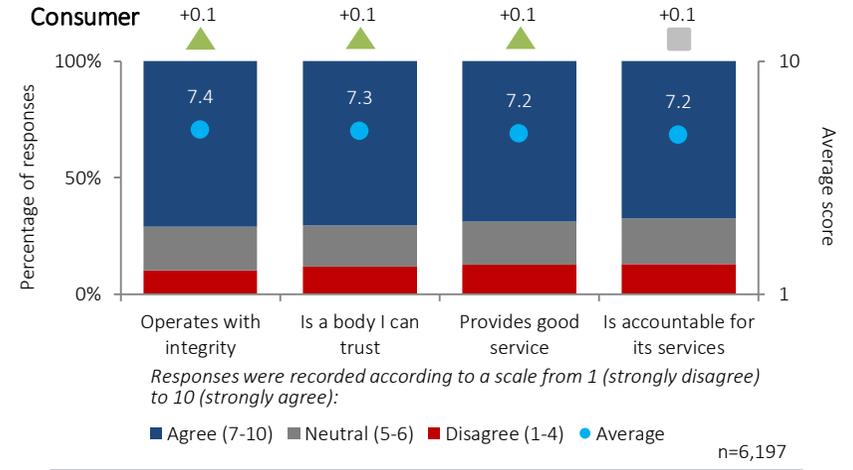
There has been a significant increase in average satisfaction across most values related attributes for consumers from 2016 to 2017. Whilst all attributes have experienced an increase in satisfaction, 'is accountable for its services' is the only attribute that has experienced a non-significant increase.

For business, there have been no significant changes in the values attributes from 2016 to 2017.

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 2.6: 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 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## Differences in Customer Views on Performance of Value Attributes by Demographics



Consistent with performance on employee attributes, older, retired consumers, those living in regional areas and on lower and middle incomes are more positive in their views of performance against value attributes. Among businesses, those in regional and rural areas and those with higher revenue are more positive in their views of NSW Government services employees.

Consumer	Satisfaction with NSW Government values above the NSW average	Satisfaction with NSW Government values below the NSW average
Age	55 years +	Under 55 years
Region	Regional	Metropolitan Rural
Employment status	Retired	Employed full time Employed part time Self-employed Employed on a casual basis Full time domestic duties Not working
Gender	No major difference	No major difference
Income	Up to \$50,000 \$50,001 to \$180,000	Over \$180,000

Business	Satisfaction with NSW Government values above the NSW average	Satisfaction with NSW Government values below the NSW average
Business Size	2-20 people 200 people+	Sole proprietor
Region	Regional Rural	Metropolitan
Industry	Mining Wholesale trade Financial and insurance services Administrative and support services Public administration and safety	Construction Electricity, gas, water and waste services Accommodation and food services Transport, postal and warehousing Education and training Health care and social assistance
Revenue	Up to \$50,000 \$150,001-\$180,000	Over \$180,000

Note: This analysis is for profiling purposes and is based on performance on each attribute compared to the NSW average for that attribute. Statistical significance not determined.

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

Businesses and consumers rate NSW Government services highest for ‘processes are easy to understand’.

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 7.1 for consumers and 6.9 for 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 6.3 for businesses). Refer to Figure 2.7 for further detail on performance against processes attributes.

For consumers, attributes ‘processes are easy to understand’ and ‘I can get to the right person the first time’ have experienced an increase in satisfaction comparing to 2016 (not statistically significant), while all other attributes remain stable.

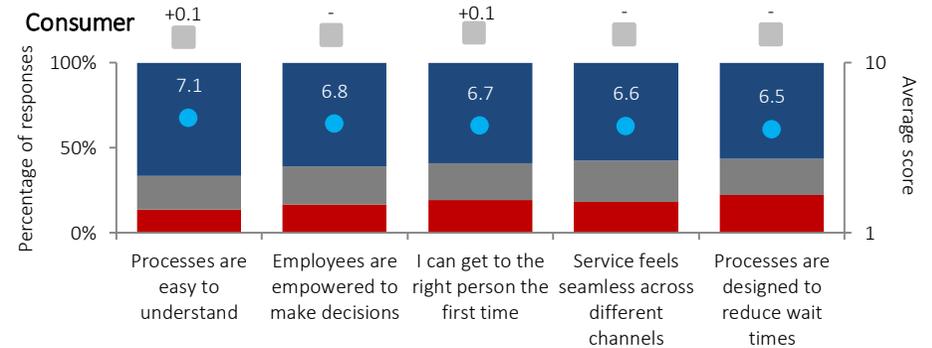
For businesses, all attributes have experienced a decrease in satisfaction from 2016 to 2017. All decreases are statistically significant with the exception of ‘processes are easy to understand’ and ‘employees are empowered to make decisions’.

This is consistent with qualitative research (focus group) findings that indicated a level of frustration among business customers stemming from difficulties locating the right contacts, forms not fit for purpose, inability to complete processes via one channel or online and lengthy wait times. An analysis of verbatim comments within the CSMS survey in 2017 also reveal that business customers feel that process and efficiency related improvements (such as reduced wait times, more staff, increased availability of staff, better access to information) would improve their satisfaction with NSW Government services.

Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

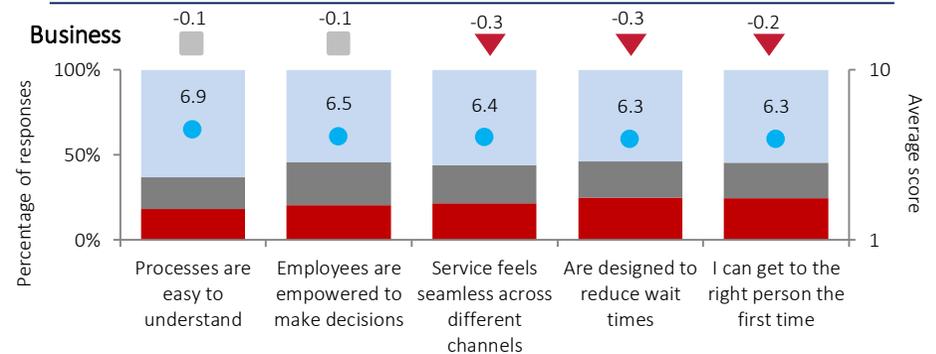
**Figure 2.7: Performance of NSW Government services against each of the process attributes**

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=5,401



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=1,477



## Differences in Customer Views on Performance of Government Processes by Demographics



Perceptions of NSW Government service processes vary among consumers by age, region, employment status and income. Consistent with variations identified in assessing both employee and value attributes, the electricity, gas, water and waste services industries are more positive in their views of performance against processes, as are businesses located in regional and rural areas.

Consumer	Satisfaction with NSW Government processes above the NSW average	Satisfaction with NSW Government processes below the NSW average
Age	18-24 years 65 years +	35-64 years
Region	Regional	Metropolitan Rural
Employment status	Retired Student Employed part time	Self-employed Employed on a casual basis Full time domestic duties Not working
Gender	No major difference	No major difference
Income	Up to \$50,000 \$150,001-\$180,000	Over \$180,000

Business	Satisfaction with NSW Government processes above the NSW average	Satisfaction with NSW Government processes below the NSW average
Business Size	2-20 people 200 people+	Sole proprietor
Region	Regional Rural	Metropolitan
Industry	Manufacturing Wholesale trade Administrative and support services Mining	Electricity, gas, water and waste services Accommodation and food services Transport, postal and warehousing Education and training Health care and social assistance Information on media and telecommunication Arts and recreation services Rental, hiring and real estate services Public administration and safety
Revenue	\$50,0001 to \$500,000 Over \$500,001	Up to \$50,000

Note: This analysis is for profiling purposes and is based on performance on each attribute compared to the NSW average for that attribute. Statistical significance not determined.

## Customer Views on Performance of NSW Government services Against Goal Attributes

Customers are most positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ however fewer customers agree that NSW Government 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 interacting with NSW Government services directly.

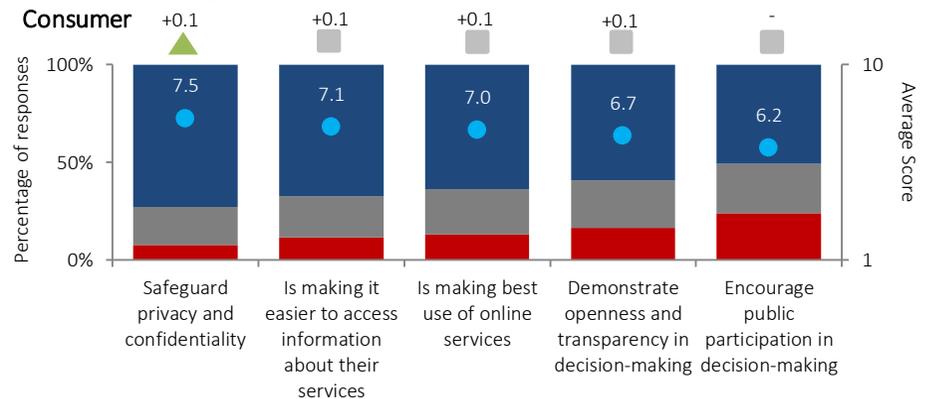
Overall, customers are more positive that NSW Government services are ‘safeguarding privacy and confidentiality,’ (average score of 7.5 for consumers and 7.4 for businesses). However, fewer agree that services ‘encourage public participation in decision making’ (average score of 6.2 for both consumers and businesses). Refer to Figure 2.8 for further detail on performance against goal attributes.

For consumers, ‘safeguarding privacy and confidentiality’ was the only attribute that received a statistically significant increase in satisfaction from 2016 to 2017.

For businesses, performance on most goal attributes declined in 2017, with the attribute ‘is making it easier to access information about their services’ declining (statistically significant decline).

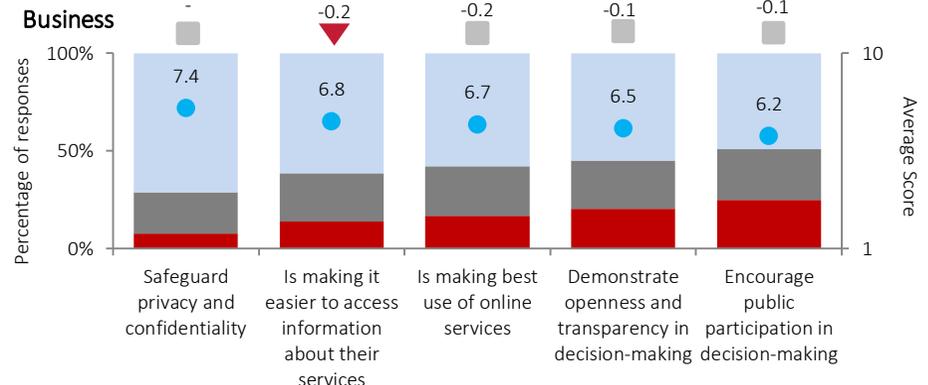
**Figure 2.8 Performance of NSW Government services against NSW Government goals**

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?”



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=5,222



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=1,444

Legend:   
 Statistically significant increase in avg. from 2016 (at 99% level of Confidence)   
 No significant change in avg. from 2016 (at 99% level of Confidence)   
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

## Differences in Customer Views on Performance of Goal Attributes by Demographics

Perceptions of NSW Government services performance against goal attributes vary by age, employment status and income. Regional customers tend to rate NSW Government services performance on goal attributes above the NSW average.

Consumer	Satisfaction with NSW Government goals above the NSW average	Satisfaction with NSW Government goals below the NSW average	Business	Satisfaction with NSW Government goals above the NSW average	Satisfaction with NSW Government goals below the NSW average
Age	18-24 years 65 years +	35-64 years	Business Size	Less than 20 people	20 people +
Region	Regional	Metropolitan Rural	Region	Rural Regional	Metro
Employment status	Retired Student Employed part time	Self-employed Employed on a casual basis Full time domestic duties Not working	Industry	Mining Administrative and support services Manufacturing Wholesale trade Financial and insurance services Rental, hiring and real estate services Public administration and safety Arts and recreation services	Transport, postal and warehousing Information media and telecommunications
Gender	No major difference	No major difference	Revenue	Up to \$50,000	Over \$50,000
Income	Up to \$180,000	Over \$180,000			

Note: This analysis is for profiling purposes and is based on performance on each attribute compared to the NSW average for that attribute. Statistical significance not determined.

# Detailed Findings

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

2. Performance Against Customer Satisfaction Drivers - Key Findings 4, 5, 6, 7, 8

3. Complaints Handling - Key Finding 9

4. Comparison of Performance by Geography - Key Finding 10

5. Perceptions and Adoption of Online Usage - Key Findings 11, 12

6. Comparison of performance to other jurisdictions – Key Finding 13

# Complaints Handling

## Key Findings Covered in this Section:

- **Key Finding 9a:** The average satisfaction of consumers whose complaints were handled well is marginally higher than that of businesses.
- **Key Finding 9b:** The proportion of consumers stating that making a complaint was easy (7-10 out of 10) was 3% higher in 2017 than in 2016. The proportion of businesses stating that making a complaint was easy decreased by 8% in 2017.

### Areas covered in this section

1. Customer Views on the Complaints Experience Delivered by NSW Government services.....p. 54
2. Impact of Complaints Experiences on Customer Satisfaction with NSW Government services.....p. 55
3. The Importance of Employee Empathy in Complaints Handling.....p. 56
4. The Impact of the Complaints Experience on Perceptions of NSW Government services.....p. 57

### Summary Findings:

- Around a quarter of customers identified that they have made a complaint to a NSW Government Department or agency in the past 12 months, specifically 22% of consumers and 29% of businesses.
- Overall, the complaints handling experience has a noticeable impact on overall satisfaction with NSW Government services. Customers who identified their complaint was handled well are more satisfied with NSW Government services overall.
- Customers' satisfaction with their complaint handling experience remains stable, however, perceptions of how well the complaint was handled continues to be polarising; 38% of consumers and 40% of businesses identified that their most recent complaint was handled well (7-10 out of 10), while 37% of consumers and 34% of businesses - identified that their most recent complaint was handled poorly (1-4 out of 10).
- Of those who had made a complaint, 53% of consumers and 49% of businesses identified that making their most recent complaint was easy (7-10 out of 10) whilst 25% of consumers and 21% of businesses identified that it was difficult (1-4 out of 10). While there is a greater proportion of businesses stating it was easy to make a complaint, ease of making a complaint scores have significantly decreased for businesses this year compared to last year.
- 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.
- Understanding and empathy in communication demonstrated during the handling of complaints is a driver of satisfaction with the process. Empathy and communication of employees is a new Whole of Government Key Primary Opportunity Area (KPOA) in 2017, and it has particular significance in the complaints handling process. Through additional qualitative research participants validated the importance of employee empathy and communication – a theme which emerged in all 6 focus groups in 2017.
- Consumers who have made a complaint to a NSW Government Department or Agency within the past 12 months are more likely than average to rate the NSW Public Service as 'difficult' and 'inefficient', while businesses who have made a complaint are more likely to rate the NSW Public Service as 'patronising' and 'impersonal'.

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

There has been a significant decrease in the proportion of businesses who identified it was easy to make their most recent complaint.

Consumers and businesses were asked several questions relating to complaints they have made to NSW Government services in the last 12 months as a supporting indicator of customer satisfaction with service delivery.

22% of consumers and 29% of businesses identified that they had made a complaint to a NSW Government service in the last 12 months (compared to 27% of consumers and 36% of businesses in 2016). An additional 16% of consumers and 15% of businesses had made a complaint more than 12 months ago.

Of those who had made a complaint, perceptions of how well the complaint was handled is polarising; 38% of consumers and 40% of businesses identified that their most recent complaint was handled well (7-10 out of 10), while 37% of consumers and 34% of businesses identified their most recent complaint was handled poorly (1-4 out of 10). Refer to Figure 3.1 for further detail.

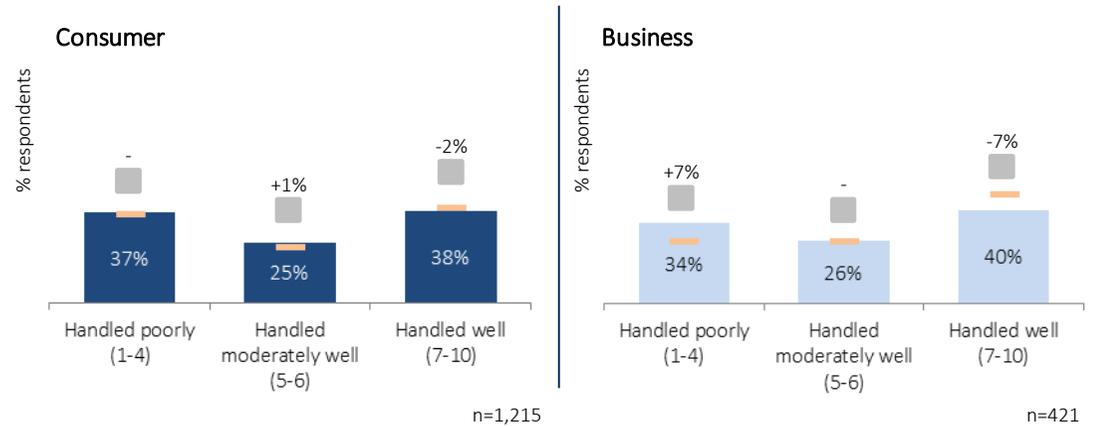
These results are slightly lower than in 2016 (not statistically significant), with 2% fewer consumers and 7% fewer businesses reporting in 2017 that their complaints were handled well.

Furthermore, in 2017 of those who had made a complaint 53% of consumers and 49% of businesses identified that making their most recent complaint was easy (7-10 out of 10) whilst 25% of consumers and 21% of businesses identified that it was difficult (1-4 out of 10).

Ease of making a complaint scores have significantly decreased for businesses this year with a significant increase for 'neither easy nor difficult'. Refer to Figure 3.2 for further detail.

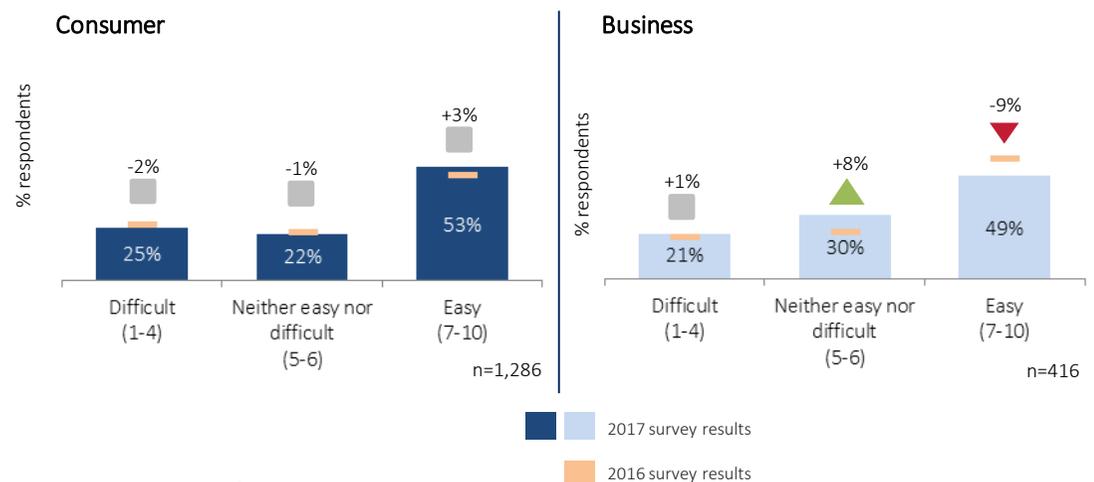
**Figure 3.1: Customer perceptions of how well their most recent complaint was handled**

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



Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

 2017 survey results  
 2016 survey results

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

Customers who identified that it was easy to make their complaint are more satisfied with NSW Government services compared to those who identified it as difficult.

Not surprisingly, satisfaction with NSW Government services is lower among consumers who have made a complaint to a NSW Government Department or Agency in the last 12 months (overall satisfaction 7.3/10) compared to average satisfaction for all consumers surveyed (overall satisfaction 7.7/10).

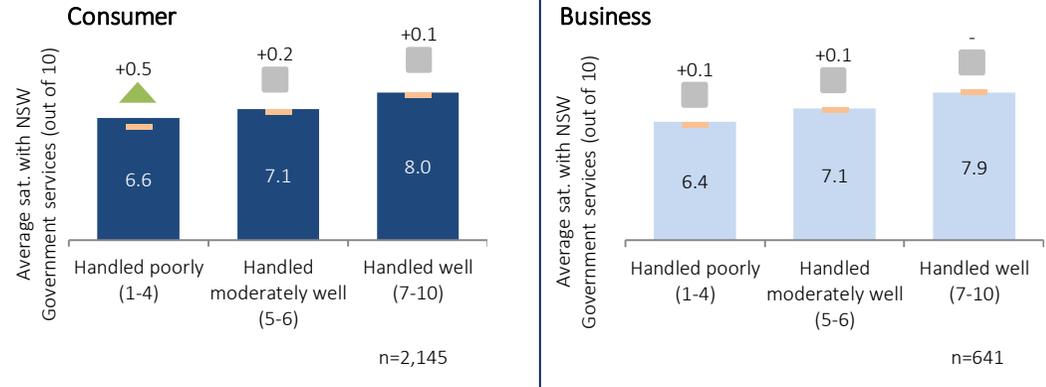
However, consumers who identified their complaint was handled well are more satisfied with NSW Government services overall (average satisfaction 8/10) compared to average satisfaction for all consumers surveyed (7.7/10). This holds true for businesses also, with average satisfaction of businesses who report that a complaint was handled well being 7.9/10, compared with average satisfaction among all businesses surveyed (7.5/10). Refer to Figure 3.3.

Customers who identified that it was easy to make their complaint are also more satisfied with NSW Government services compared to those who identified it as difficult (average satisfaction of 7.6 for both consumers and businesses who identified the process as easy compared to the average satisfaction of 6.6 for consumers 6.7 for businesses who identified the process as difficult). Refer to Figure 3.4. For consumers, satisfaction amongst those who identified the process was difficult has shown a significant improvement since 2016.

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.

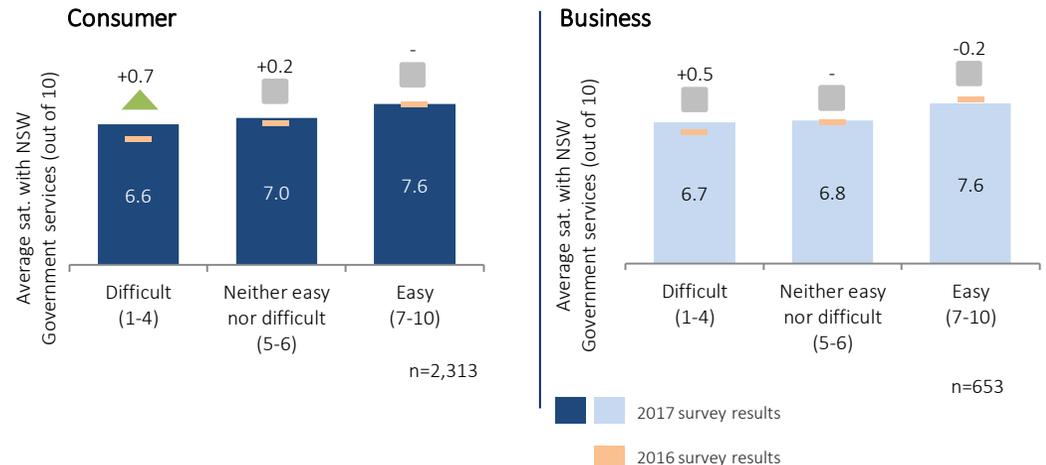
**Figure 3.3: Impact of complaints handling on satisfaction with NSW Government services**

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



Legend:   
 Statistically significant increase in avg. from 2016 (at 99% level of Confidence)   
 No significant change in avg. from 2016 (at 99% level of Confidence)   
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## The Importance of Employee Empathy in Complaints Handling

Empathy and communication of employees during the complaints process drives customers' satisfaction with the outcome.

Empathy and communication of employees is a new Whole of Government Key Primary Opportunity Area (KPOA) in 2017<sup>1</sup>. This KPOA has particular significance in the complaints handling process. Through additional qualitative research participants validated the importance of employee empathy and communication – a theme which emerged in all 6 focus groups in 2017.

Understanding and empathy in communication demonstrated during the handling of complaints is a driver of satisfaction with the process. This includes giving feedback during the call (affirm), consulting, and demonstrating care. It was perceived that empathy is generally best achieved in person or over the phone.

### Characteristics which most impact the complaints handling process (from focus groups)

- **Transparency** of process e.g. timing 3-5 days;
- **Understanding and empathy** in communication is key for customers who are “just looking for someone who understands and cares” and customer service staff who will provide affirmation and ongoing feedback. This is generally best achieved in person or over the phone;
- **Continuity and accountability**, which for example, could be demonstrated through recording interactions in instances of multiple case handlers to ensure the effective progress of complaints handling process;
- **Ownership** - “when there’s no feedback, I have to keep calling and chasing them up”

### Suggestions from customers to improve complaints handling (from focus groups)

- A more personalised experience to facilitate understanding and empathy i.e. personal contact including a dedicated case manager and follow up, as well as empathetic, well-trained staff;
- A transparent process to demonstrate progress and accountability with a clear direction of procedures and follow up, i.e. “I’ll let you know in 3 days the outcome of this step”
- A quick process with resolution, i.e. short wait times;
- Multi-channel process, e.g. staff to follow up initial interactions with an acknowledging and affirming email, call with progress updates, and SMS when resolved.

“  ”

*“[Customers are] just looking for someone who understands and cares”*

“  ”

*“[Providing] sympathetic staff makes you feel like you’re talking to someone who actually cares”*

*“When there’s no feedback I have to keep calling and chasing them up”*

“  ”

*Source: qualitative research*

<sup>1</sup>See chapter 2 of the Detailed report for further information on Whole of Government KPOAs.

# Impact of Complaints Experiences on Perceptions of NSW Public Service

Consumers who have made a complaint are more likely to rate the NSW Public Service as ‘difficult’ and ‘inefficient’ while businesses who have made a complaint are more likely to rate the NSW Public Service as ‘patronising’ and ‘impersonal’.

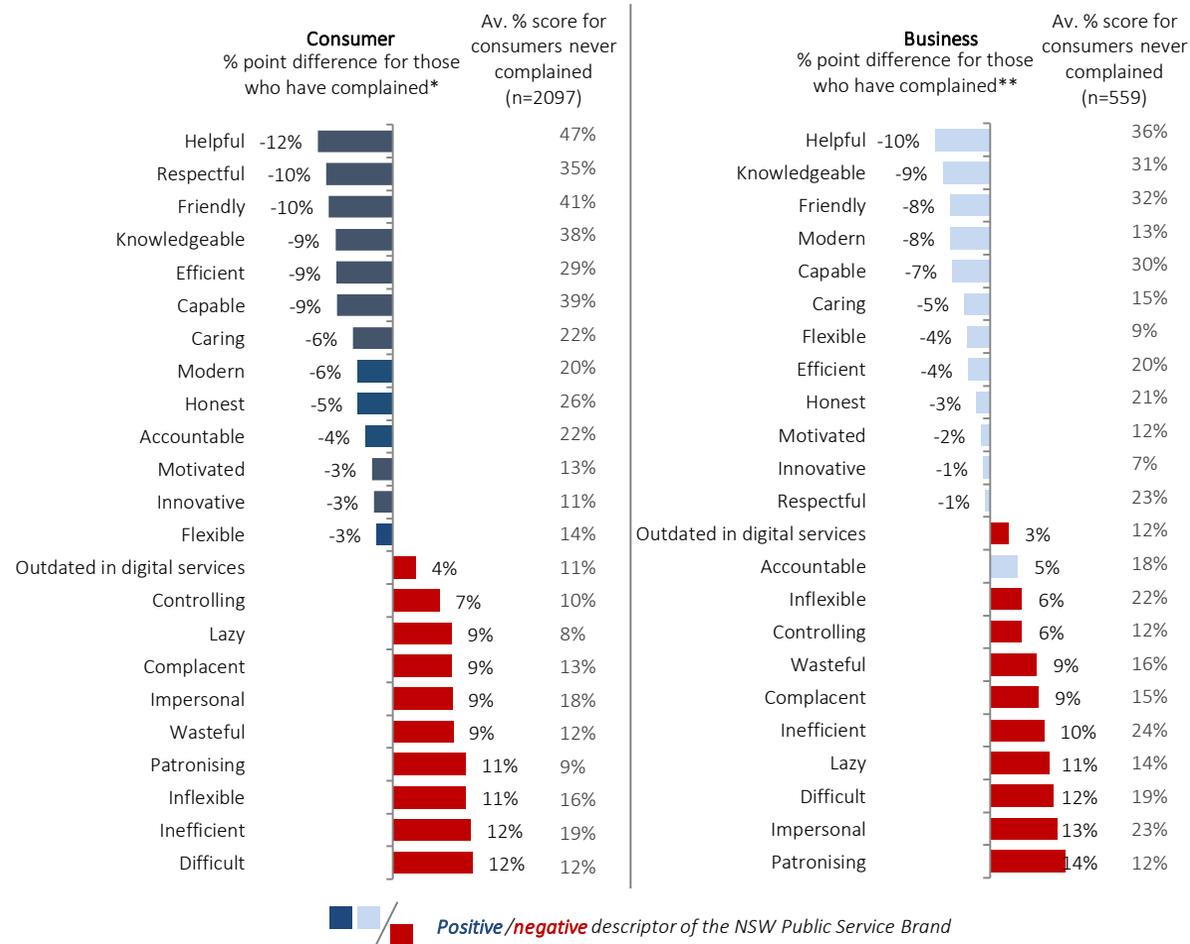
Customers were asked which words would they use to describe the NSW Public Service overall. Figure 3.5 illustrates the differences in perceptions between customers who have made a complaint to a NSW Government Department or Agency within the past 12 months versus those who have never made a complaint. Positive scores indicate descriptors more likely to be selected by complainants; negative scores indicate descriptors less likely to be selected by complainants.

Complainants are more likely to select negative descriptors for the NSW Public service. In particular, consumers are more likely to select ‘difficult’, ‘inefficient’, ‘inflexible’ and ‘patronising’ to describe the NSW Public Service. Businesses who have made a complaint are more likely to perceive the NSW Public Service to be ‘patronising’, ‘impersonal’, ‘difficult’ and ‘lazy’.

These results indicate the negative impact the complaints handling processes of NSW Government services may have on the citizen’s perceptions of the NSW Public service overall.

**Figure 3.5: Impact of complaints handling on perceptions of 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?”



\* % point difference = % scores for consumers have complained (n=1315) – % score for consumers never complained (n=2097)

\*\* % point difference = % scores for businesses have complained (n=421) – % score for businesses never complained (n=559)

# Detailed Findings

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

2. Performance Against Customer Satisfaction Drivers - Key Findings 4, 5, 6, 7, 8

3. Complaints Handling - Key Finding 9

4. Comparison of Performance by Geography - Key Finding 10

5. Perceptions and Adoption of Online Usage - Key Findings 11, 12

6. Comparison of performance to other jurisdictions – Key Finding 13

## Comparison of Performance by Geography

### Key Findings Covered in this Section:

- **Key Finding 10a:** While customers from metropolitan areas continue to have the lowest satisfaction compared to other regions year on year, metropolitan is the only region to experience an increase across both consumers and businesses from 2016 to 2017.
- **Key Finding 10b :** Expectation by region varies across consumer and business. Expectation is highest for consumers from regional NSW and expectation is highest for businesses located in rural NSW. The only significant change from 2016 to 2017 is for consumers from metropolitan regions.

### Areas covered in this section

1. Satisfaction, Expectation and Ideal Service by Region.....p. 60
2. NSW Government services Dealt with by Region.....p. 62
3. Performance of NSW Government services by Region.....p. 63
4. Contact Methods by Region.....p. 66

### Summary Findings

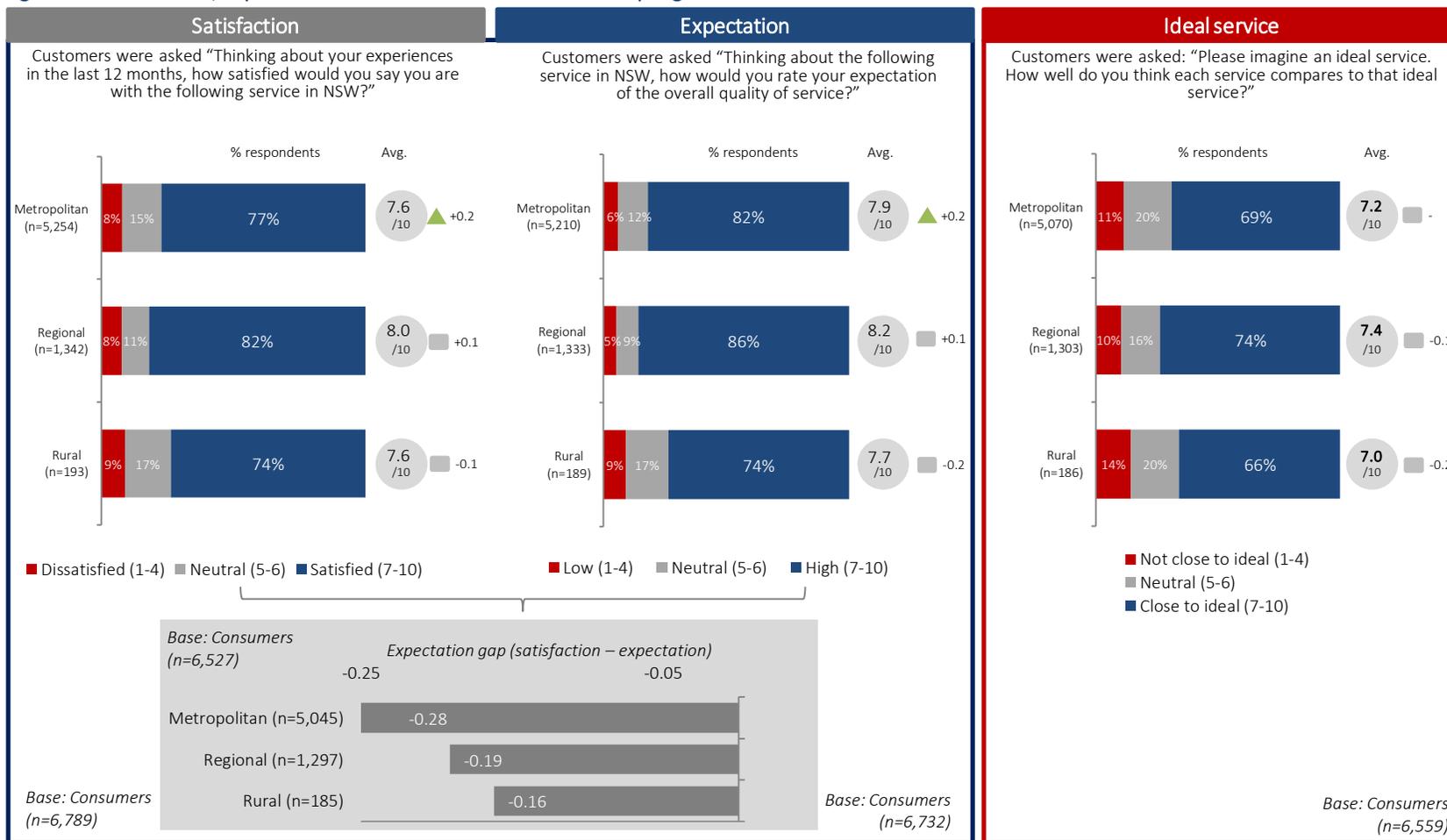
- Among consumers, satisfaction and expectation increased statistically significantly in metropolitan regions this year compared to 2016 however this region continues to have the greatest gap between these two measures. Regional consumers have the highest satisfaction, expectation and ideal scores in NSW.
- In line with higher overall satisfaction, regional consumers are generally more satisfied with Government Service processes, employees, goals and values, compared to metropolitan and rural consumers, and particularly so for employee attributes ‘proactive in helping’ and ‘explain intended actions’.
- Among businesses, satisfaction, expectation and ideal is highest for rural businesses compared to other regions. Similar to consumers, businesses in metropolitan regions show the greatest gap between satisfaction and expectation.
- Metropolitan businesses are least satisfied with Government Service processes, employees, goals and values, compared to regional and rural consumers, particularly in regards to employee attributes ‘focus on customer needs’.
  - Note, through statistical analysis we tested whether there was a relationship (correlation) between overall life satisfaction and satisfaction and expectation of services by regions. Our data showed that there was no direct relationship between the measures, meaning that high life satisfaction does not necessarily lead to high service satisfaction and vice versa
- Car and Boat Registration services are the most likely service dealt with in the past 12 months for regional and rural consumers while metropolitan consumers are most likely to have dealt with Public Transport services. Rural consumers are also more likely to have dealt with Police and TAFE services when compared to regional and metropolitan consumers.
- For all businesses customers, Car and Boat Registration services are the most likely service dealt with in the past 12 months and rural businesses are also more likely to have dealt with several other services. Metropolitan businesses are least satisfied with Government Service processes, employees, goals and values, compared to regional and rural consumers, particularly in regards to employee attributes ‘focus on customer needs’
- Face-to-face is the most common contact method used and preferred by consumers, while online is the second most preferred ahead of telephone as third. Metropolitan consumers, who we might expect to have greater access to services in person, show a slightly higher preference for online and email than regional and rural consumers.
- Contact methods used and preferred by businesses varies by region. Overall, businesses use multiple methods to carry out their dealings with services in NSW. These results reaffirm the need for multi-channel contact methods to meet the needs of businesses.



# Consumer Satisfaction, Expectation and Ideal by Region

Satisfaction and expectation increased statistically significantly in metropolitan regions this year compared to last year however this region continues to have the greatest gap between these two measures. Regional consumers have the highest satisfaction, expectation and ideal scores in NSW.

Figure 4.1: Satisfaction, expectation and ideal service of consumers by region



Note: Figures displayed in graph may not sum to 100% due to rounding

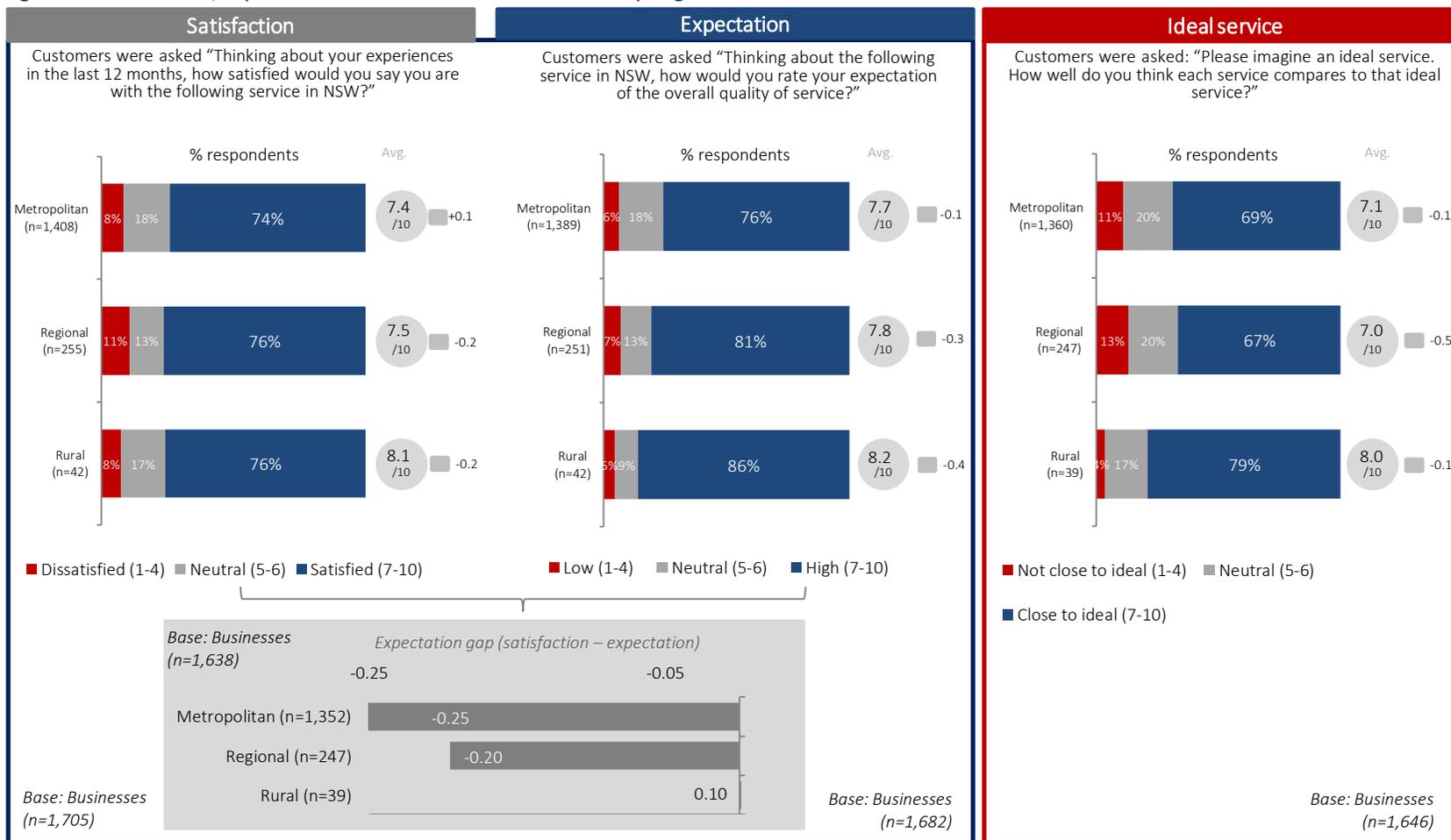
- ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
- No significant change in avg. from 2016 (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



# Business Satisfaction, Expectation and Ideal by Region

Satisfaction, expectation and Ideal is highest for rural businesses compared to other regions. Similar to consumers, businesses in metropolitan regions show the greatest gap between satisfaction and expectation.

Figure 4.2: Satisfaction, expectation and ideal service of businesses by Region



Note: Figures displayed in graph may not sum to 100% due to rounding

- Legend:
- ▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)
  - No significant change in avg. from 2016 (at 99% level of Confidence)
  - ▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

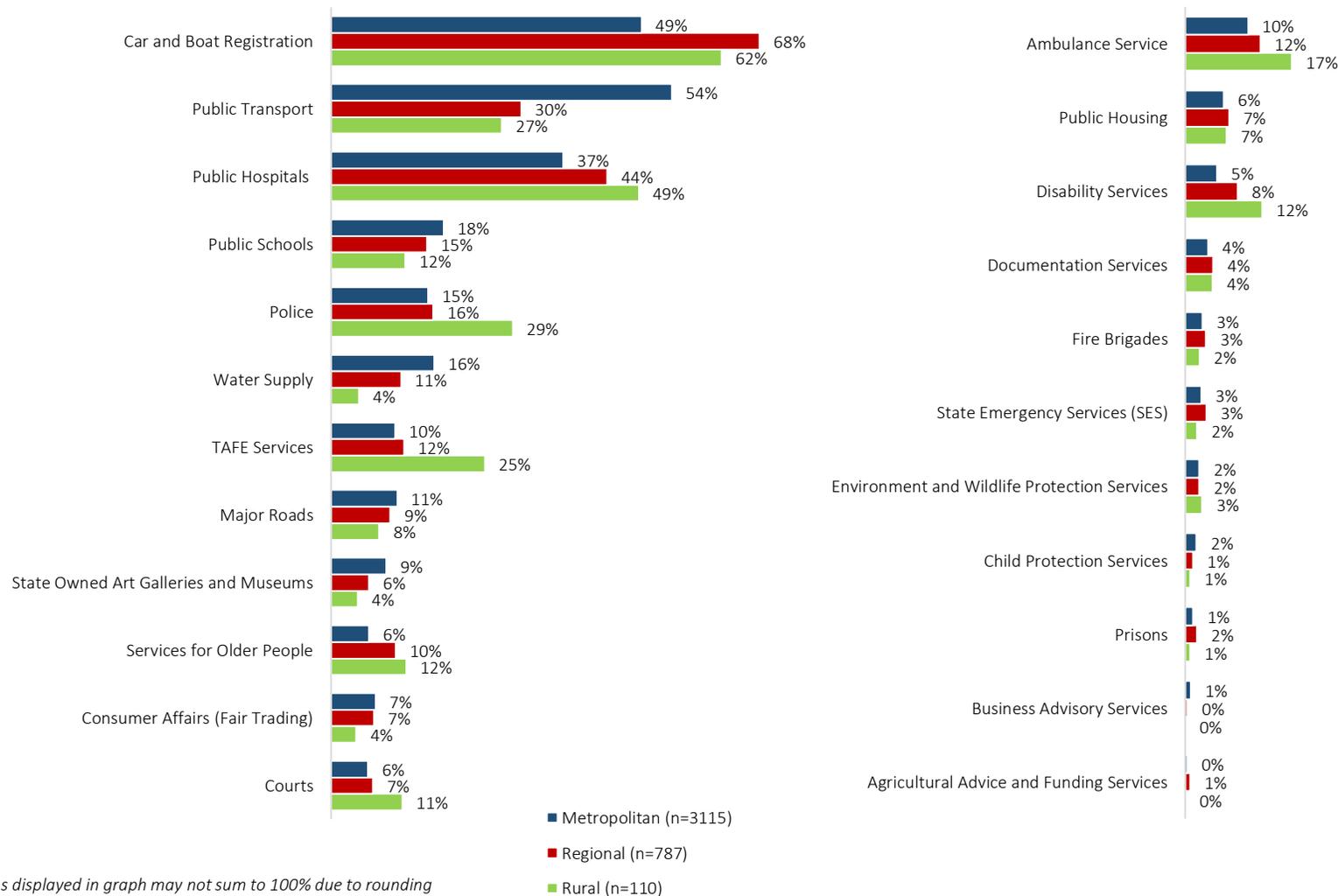


## NSW Government services Dealt with by Consumers and Region

Regional and rural consumers are most likely to have dealt with Car and Boat Registration services within the past 12 months while metropolitan consumers are most likely to have dealt with Public Transport services. Rural consumers are also more likely to have dealt with Police and TAFE services when compared to regional and metropolitan consumers.

**Figure 4.3: Services dealt with in the past 12 months for consumers by region (ranked by total %)**

Customers were asked "And which of these have you had direct dealings with in the past 12 months?"



Note: Figures displayed in graph may not sum to 100% due to rounding

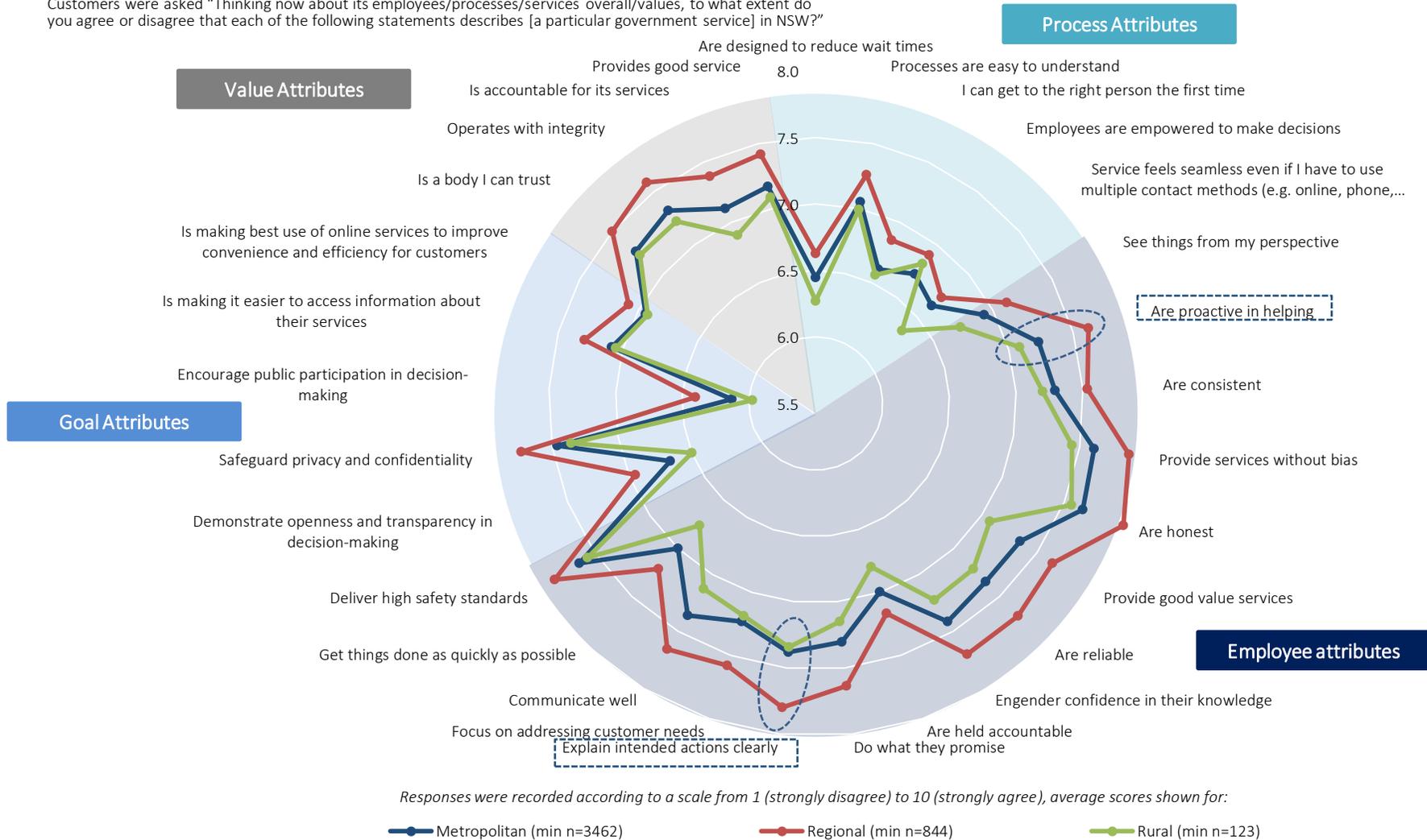


# Performance of NSW Government services among Consumers by Region

In line with higher overall satisfaction, regional consumers are generally more satisfied with Government Service processes, employees, goals and values, compared to metropolitan and rural consumers, and particularly so for employee attributes 'proactive in helping' and 'explain intended actions'.

**Figure 4.4: Performance of NSW Government services among consumers by region**

Customers were asked "Thinking now about its employees/processes/services overall/values, to what extent do you agree or disagree that each of the following statements describes [a particular government service] in NSW?"



Source: Office of the Customer Service Commissioner, Customer Satisfaction Measurement Survey 2017

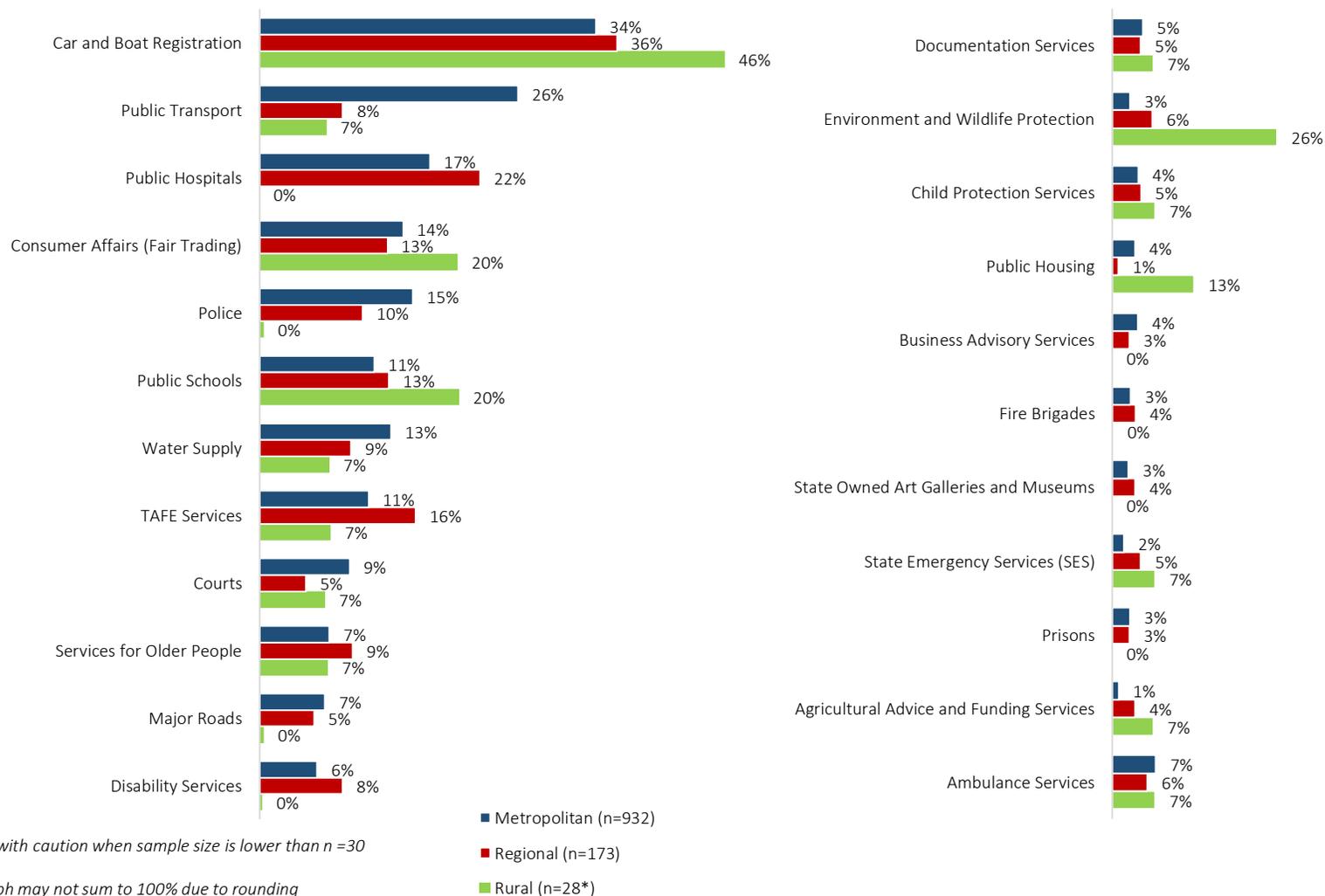


## NSW Government services Dealt with by Businesses and Region

Car and Boat Registration services are the most likely service dealt with in the past 12 months for all business customers. Rural businesses are also more likely to have dealt with Environment and Wildlife Protection, Public Housing, Public Schools, Consumer Affairs and Car and Boat Registration services in the past 12 months when compared to regional and metropolitan regions.

**Figure 4.5: Services dealt with in the past 12 months for businesses by region (ranked by total %)**

Customers were asked "And which of these have you had direct dealings with in the past 12 months?"



\*Note, interpret Rural results with caution when sample size is lower than n =30

Note: Figures displayed in graph may not sum to 100% due to rounding

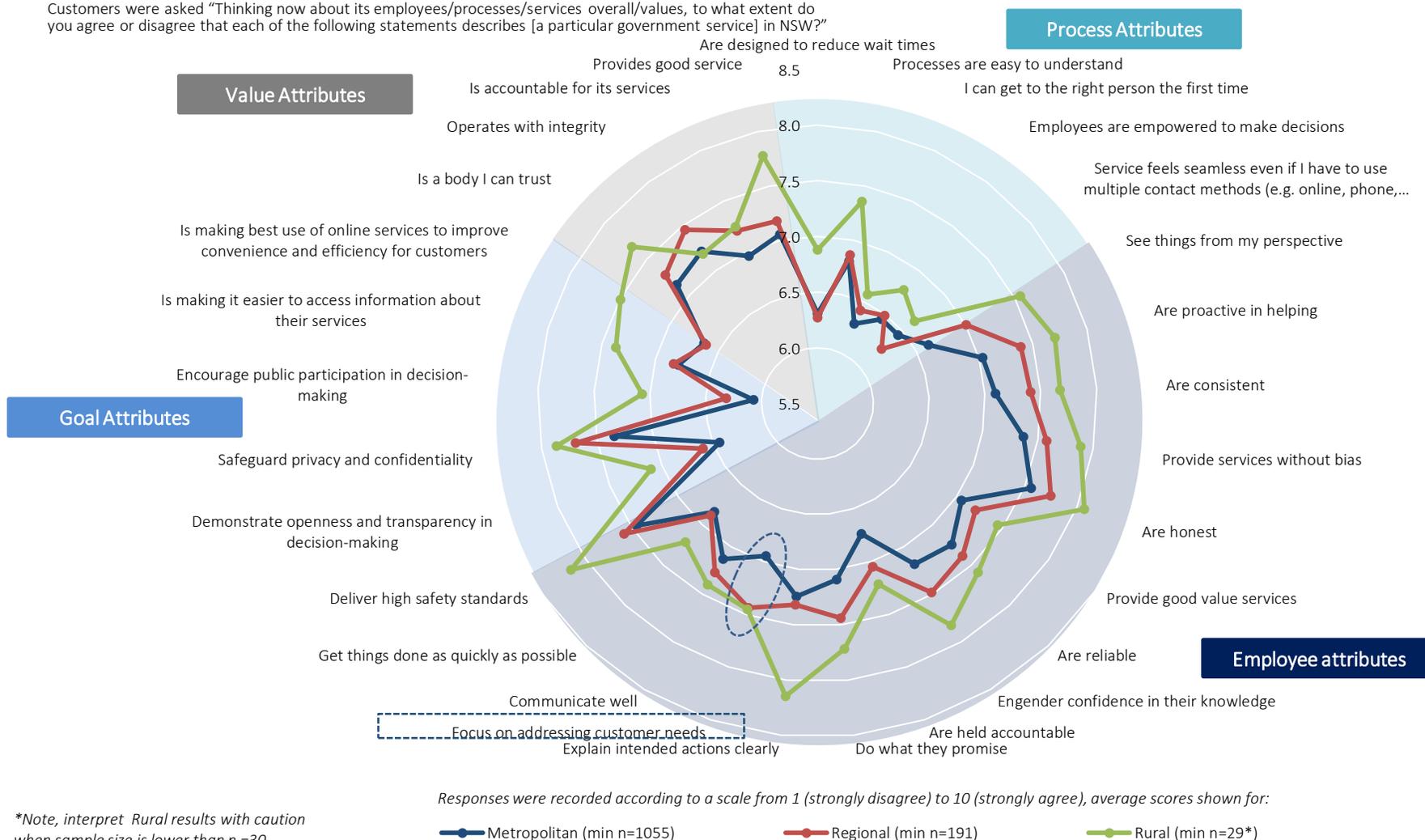


# Performance of NSW Government services among Businesses by Region

Metropolitan businesses are least satisfied with Government Service processes, employees, goals and values, compared to regional and rural consumers, particularly in regards to employee attributes 'focus on customer needs'.

**Figure 4.6: Performance of NSW Government services among businesses by region**

Customers were asked "Thinking now about its employees/processes/services overall/values, 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), average scores shown for:

Metropolitan (min n=1055)      Regional (min n=191)      Rural (min n=29\*)

\*Note, interpret Rural results with caution when sample size is lower than n =30

# Current and Preferred Service Contact Method By Region for Consumers to Access Services

Face-to-face is the most common contact method used and preferred across all regions for consumers dealing with NSW Government services.

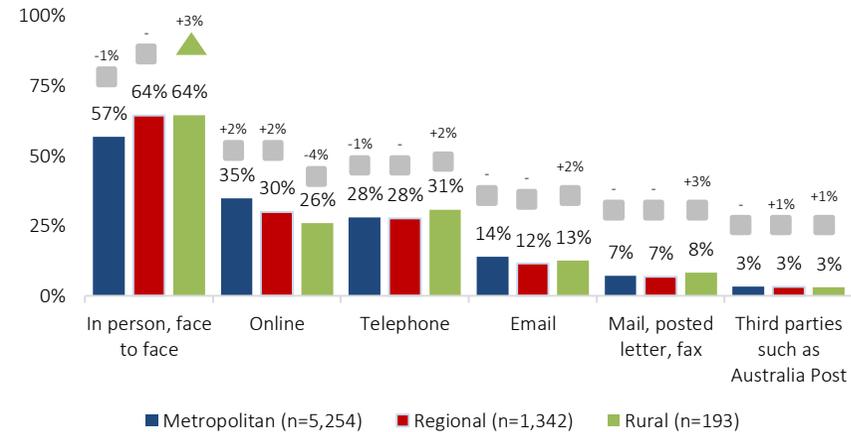
Customers were asked about the contact methods through which they have had direct dealings with NSW Government services in the last 12 months and their preferred contact methods for dealing with these services in the future.

Face-to-face is the most common contact method used by consumers for dealing with services in NSW in all metropolitan, regional and rural regions. Face-to-face contact method use has also significantly increased among rural consumers this year compared to last (refer to figure 4.7).

Face-to-face is also the most preferred contact method for metropolitan, regional and rural consumers and this preference has significantly increased for rural consumers this year compared to last. Online is the second most preferred contact method ahead of telephone as third. Metropolitan consumers, who we might expect have greater access to face-to-face services, show a slightly higher preference for online and email than regional and rural consumers (refer to figure 4.8).

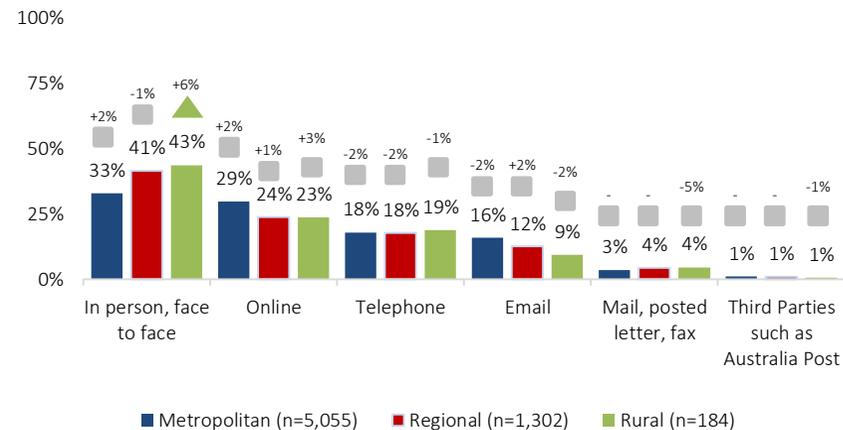
**Figure 4.7: Contact methods used by consumers by region**

Customers were asked, "Generally, which contact method have you used to carry out your dealing directly with each of the following services in NSW?" [Multiple answers can be selected]



**Figure 4.8: Contact methods preferred by consumers by region**

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



Note: Figures displayed in graph may not sum to 100% due to rounding

Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## Current and Preferred Service Contact Method By Region for Businesses to Access Services

For businesses, there is no stand-out preferred contact method for dealing with NSW Government services, with preferences divided between in person, telephone and email as the lead methods across regions. These results reaffirm the need for multi-channel contact methods to meet the diverse needs of business customers.

Customers were asked about 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.

Contact methods used by businesses vary by region. Overall, businesses use multiple methods to carry out their dealings with services in NSW. Metropolitan and regional businesses are most likely to use face-to-face or telephone methods, while rural businesses are most likely to use online and email. For rural businesses in 2017 there has been a significant increase this year in the use of telephone, online and email contact methods compared to 2016. (Refer to Figure 4.9 for further detail).

Preference for contact method used for service dealings by business customers also varies and there is no outstanding preference for one method over another. Metropolitan and regional businesses prefer either face-to-face, email or telephone contact methods. Rural business prefer telephone (significantly increased this year compared to last), face-to-face, email then online. (Refer to Figure 4.10 for further detail).

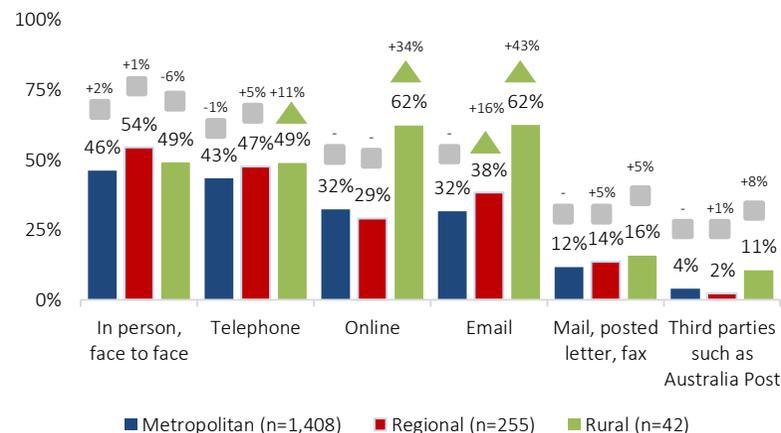
These results illustrate the expectations of businesses across the state to provide multiple channels for communication with NSW Government services.

Note: Figures displayed in graph may not sum to 100% due to rounding

Legend: Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

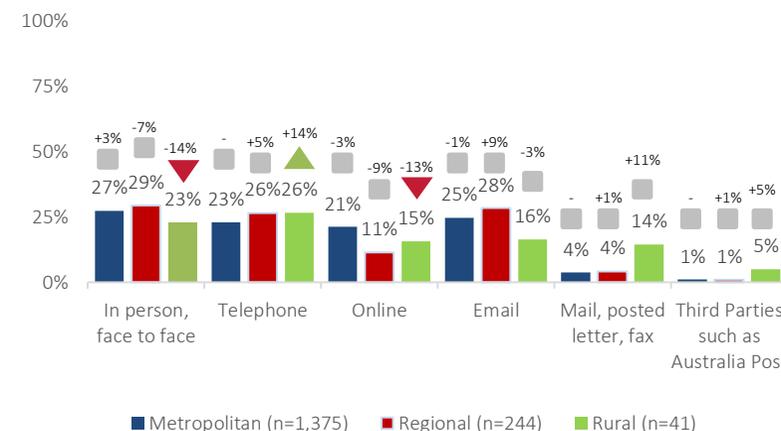
**Figure 4.9: Contact methods used by businesses by region**

Customers were asked, "Generally, which contact method have you used to carry out your dealing directly with each of the following services in NSW?" [Multiple answers can be selected]



**Figure 4.10: Contact methods preferred by businesses by region**

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



# Detailed Findings

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

2. Performance Against Customer Satisfaction Drivers - Key Findings 4, 5, 6, 7, 8

3. Complaints Handling - Key Finding 9

4. Comparison of Performance by Geography - Key Finding 10

5. Perceptions and Adoption of Online Usage - Key Findings 11, 12

6. Comparison of performance to other jurisdictions - Key Finding 13

## Perception of Online Services (1 of 2)

### Key Findings Covered in this Section:

- **Key Finding 11a:** The channels most commonly used by customers to interact with services in 2017 are in person, online and telephone.
- **Key Finding 11b:** Online experienced the biggest increase in average satisfaction (statistically significant) for consumers from 2016 to 2017.
- **Key Finding 11c:** Consistent with 2015 and 2016, consumers are most satisfied with aspects relating to accurate content and security when dealing with services online.

### Areas covered in this section

1. Current and Preferred Service Contact Method for Accessing Services.....p. 71
2. Variation in Customer Satisfaction by Service Contact Method ....p. 72
3. Customers' Views of NSW Government Online Services .....p. 73

### Summary Findings

- Face-to-face continues to be the most commonly used and preferred contact method for customers to access NSW Government services.
- Online is the second most preferred contact method for consumers and the use of email as a contact method has significantly increased among business customers compared to 2016.
- 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 has also significantly increased among consumers who have accessed services online or in person compared to scores from 2016.
- These results suggest a strong linkage between customers' perceptions of the simplicity and efficiency of processes and the simplicity and efficiency of online service delivery, which together impact the perceived ability of NSW Government employees to provide efficient and effective services to customers.
- In regards to the online experience, consumers are most satisfied that the information is being handled securely, that the format of content met access requirements and that the website or app was useful and allowed them to do what they needed to do. However, businesses were less satisfied with the online experience than consumers overall. In particular businesses were less satisfied with content meeting access requirements, that it allowed them to do everything they needed to and that online support provided was sufficient. These themes are potential improvement areas for business customers.

## Perception of Online Services (2 of 2)

### Key Findings Covered in this Section:

- **Key Finding 12a:** Customers who identified that they chose to go online have a higher average satisfaction with online services than those who are directed/prompted to go online or had no other option.
- **Key Finding 12b:** Majority of customers use laptop and/or desktop computers to access online content.
- **Key Finding 12c:** Consistent with 2015 and 2016, consumers are most likely to go online if information remains confidential and if it is easy to find information.

### Areas covered in this section

4. Time of Day by Contact Method.....p. 74
5. Customer Choice to Use Online Services.....p. 75
6. Devices Used to Access Services Online.....p. 76
7. Customer Identified Drivers of Digital Adoption.....p. 77
8. Customer Desire for Continued Digitisation of Key Processes .....p. 78

### Summary Findings

- Customers primarily carry out direct dealings with NSW Government services during business hours via telephone and face-to-face contact methods while online and email enable customer engagement outside of business hours.
- 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 compared to those customers who had no option.
- When dealing with NSW Government services online, customers most commonly access content from a laptop or desktop computer, however the use of smartphone devices to access online services has significantly increased this year for both consumer and business customers. However, satisfaction of the overall experience of using the website/app to complete the task was also lowest when using smartphone devices to access services compared to other devices.
- Consistent with 2016, improvements to navigation, security, availability and accuracy of content is most likely to increase satisfaction with and usage of online service contact methods.
- Through additional qualitative research participants validated the customer desire for the continued digitisation of key processes across government services.

# Current and Preferred Service Contact Method for Accessing Government Services

Consistent with 2016, face-to-face remains the most commonly used and preferred contact method to access NSW Government services by customers.

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, 48% of businesses). Face-to-face is also the most commonly preferred contact method (35% of consumers and 27% 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 33% online). Online is also the second most commonly preferred contact method for these dealings (34% prefer face-to-face followed by 27% who prefer online). Although telephone remained as the third most preferred contact method, there is a significant decrease in preference since 2016 (by 2%).

For businesses, online is the fourth most common contact method through which they have direct dealings with NSW Government services, behind face-to-face, telephone and email (48% face-to-face, 44% telephone, 35% email). Comparing to 2016, email has significantly increased as a method used for businesses (35% compared to 25% in 2016), while online has significantly decreased as a preferred contact method (19% compared to 24% in 2016).

Overall, the range of preferences across contact methods for businesses (27% for face-to-face, 25% for email, 24% for telephone and 19% for online) demonstrates the need for multi-channel contact methods to best meet the needs of these customers. This was further validated in the qualitative research where business customers emphasised the need for flexibility in service via adaptable forms, and a range of contact methods.

Note: Figures displayed in graph may not sum to 100% due to rounding

Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

Figure 5.1: Contact methods used by consumers and businesses

Customers were asked, "Generally, which contact method have you used to carry out your dealing directly with each of the following services in NSW?" [Multiple answers can be selected]

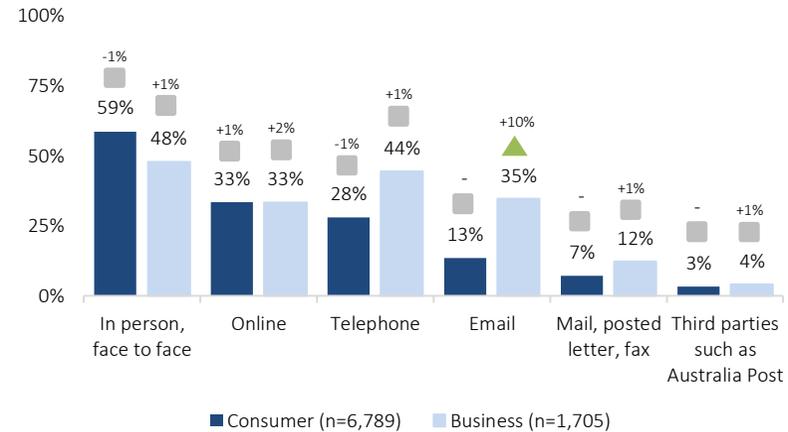
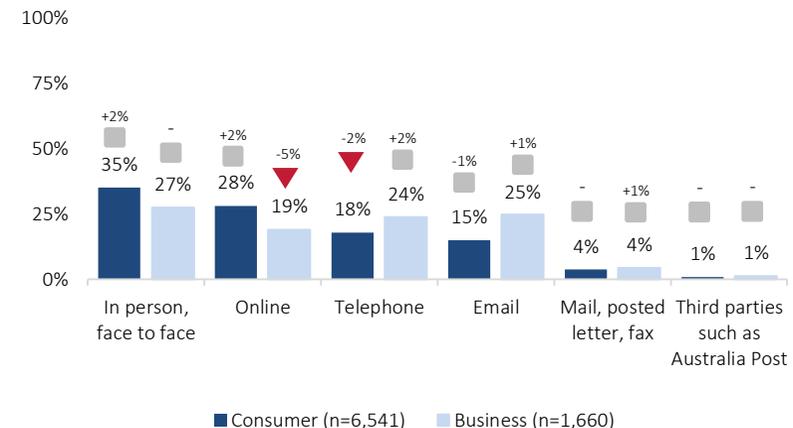


Figure 5.2: Contact methods preferred by consumers and businesses

Customers were asked, "Generally, which contact method do you prefer to carry out your 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 highest among customers who have accessed NSW Government services online (average satisfaction of 7.8 for consumers and 7.6 for businesses) compared to overall average satisfaction (7.7 for consumers and 7.5 for businesses). For consumers, satisfaction is lowest for consumers who use mail, post and fax contact methods (average satisfaction 7.3) and for businesses it is lowest when using third party methods (average satisfaction 6.8). Refer to Figure 5.3 for further detail.

Satisfaction has significantly increased among consumers who have accessed services online or in person compared to scores from 2016 (+0.1 for online and +0.2 for face-to-face). For businesses scores remain consistent to 2016.

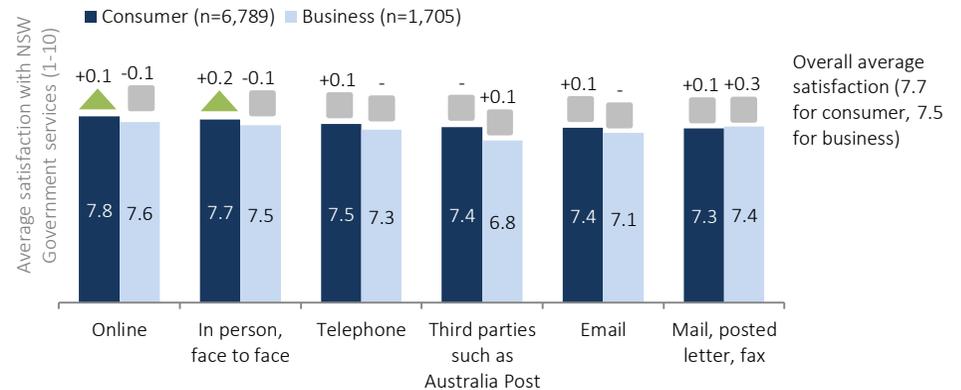
Exploring the impact of contact method use on perceptions of Government processes shows that those who have accessed NSW Government services online have more positive perceptions of processes, specifically that ‘processes are designed to reduce wait times’ (average score of 6.8 for online users compared to 6.3 for face-to-face) and ‘processes are easy to understand’ (average score of 7.3 for online users compared to 7.1 for face-to-face). However, face-to-face methods are perceived as more likely to have employees who are empowered to make decisions (average score 6.8 for face-to-face compared to 6.7 for online). These results are consistent with 2016. (Refer to Figure 5.4 for further detail).

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

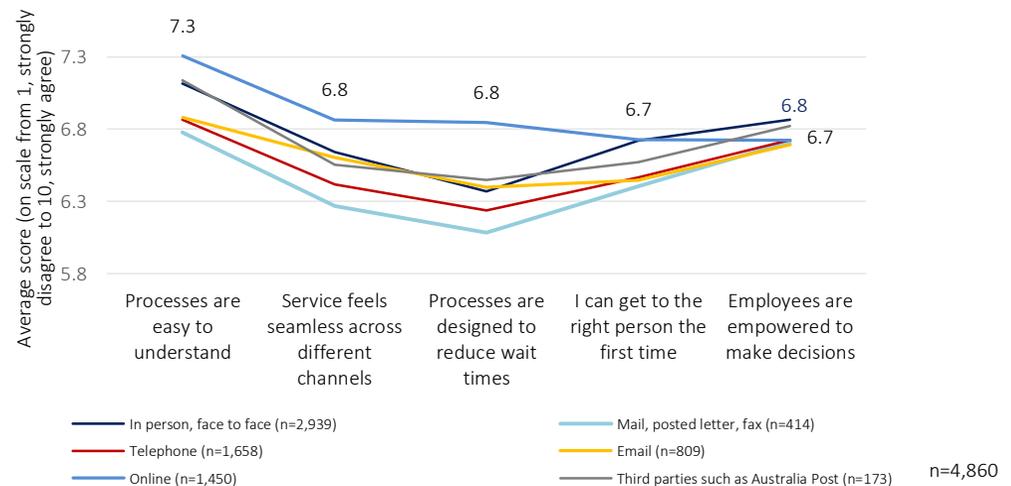
Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

**Figure 5.3: Variation in overall satisfaction by contact method**

Customers were asked, “Generally, which contact method have you used to carry out your dealing directly with each of the following services in NSW?”



**Figure 5.4: Perceptions of processes by contact method(s) used to access services (consumers)**



# Customers' Views of NSW Government Online Services

Customers are positive about their experiences interacting with services online, however businesses are generally less satisfied than consumers overall.

Customers who had gone online to carry out direct dealings with NSW Government services in the last 12 months were asked about their overall satisfaction when using the contact method to complete their task, as well as their satisfaction with several aspects of their online experience.

Customers' 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.

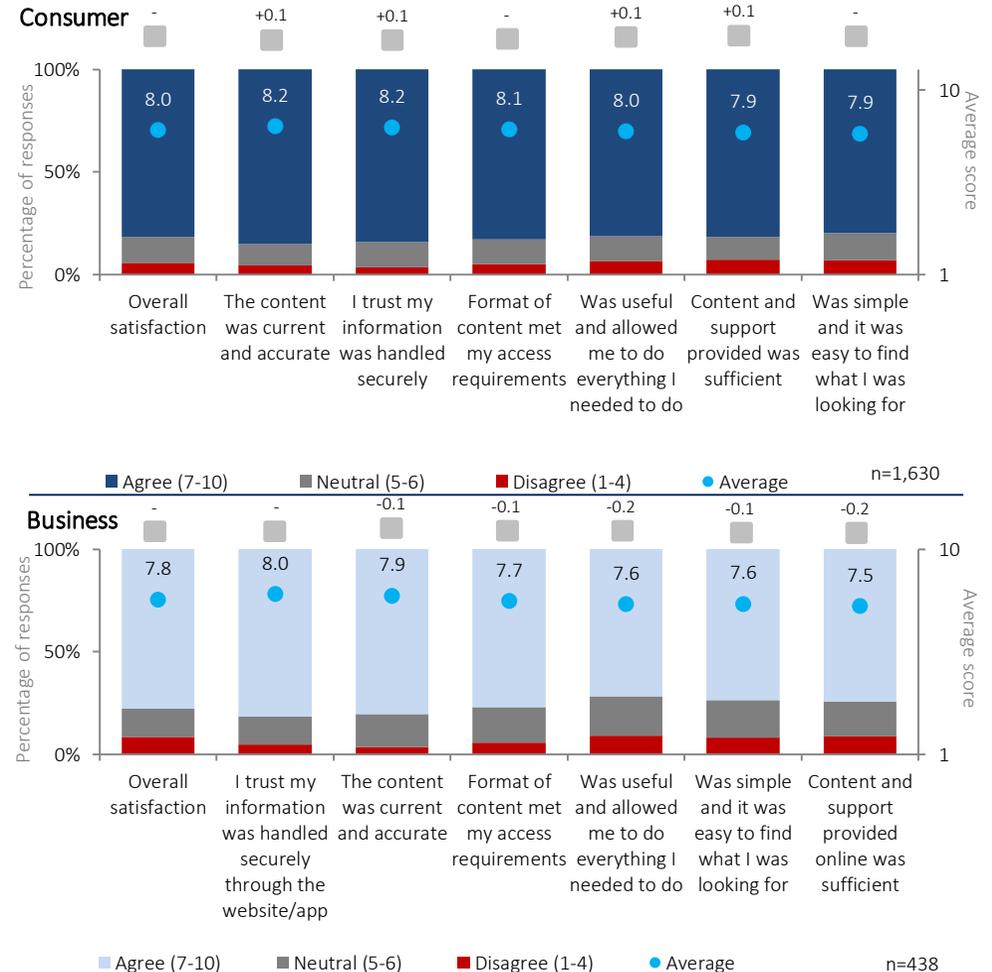
Consumers are most satisfied with information being handled securely, the format of content meeting access requirements, and that the website or app was useful and allowed them to do what they needed to do.

Businesses were less satisfied than consumers overall and in particular were less satisfied that the content and support provided online was sufficient, that it was easy to find what they were looking for and that the website or app allowed them to do everything they needed to. These areas pose opportunities for improvement for business customers.

**Figure 5.5: 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?"

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



Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## Time of Day by Contact Method Used

Customers primarily carry out direct dealings with NSW Government services during business hours via telephone and face-to-face contact methods, while online and email enable customer engagement outside of business hours.

Customers were asked at what time of day they carried out their direct dealing with NSW Government services for the contact method used.

The survey results suggest that consumers are most likely to carry out their direct dealings with NSW Government services during business hours on a weekday. Face-to-face and telephone were the most likely contact methods to be used during business hours (61% of consumers, and 92% of businesses for face-to-face; 57% of consumers, and 90% of businesses for telephone).

Online contact methods and email enable customers to engage in direct dealings outside of business hours. For consumers and businesses, online and email channels continue to be utilised on weekdays outside of business hours and on weekends. Business customers are also likely to utilise third party channels on weekdays outside business hours.

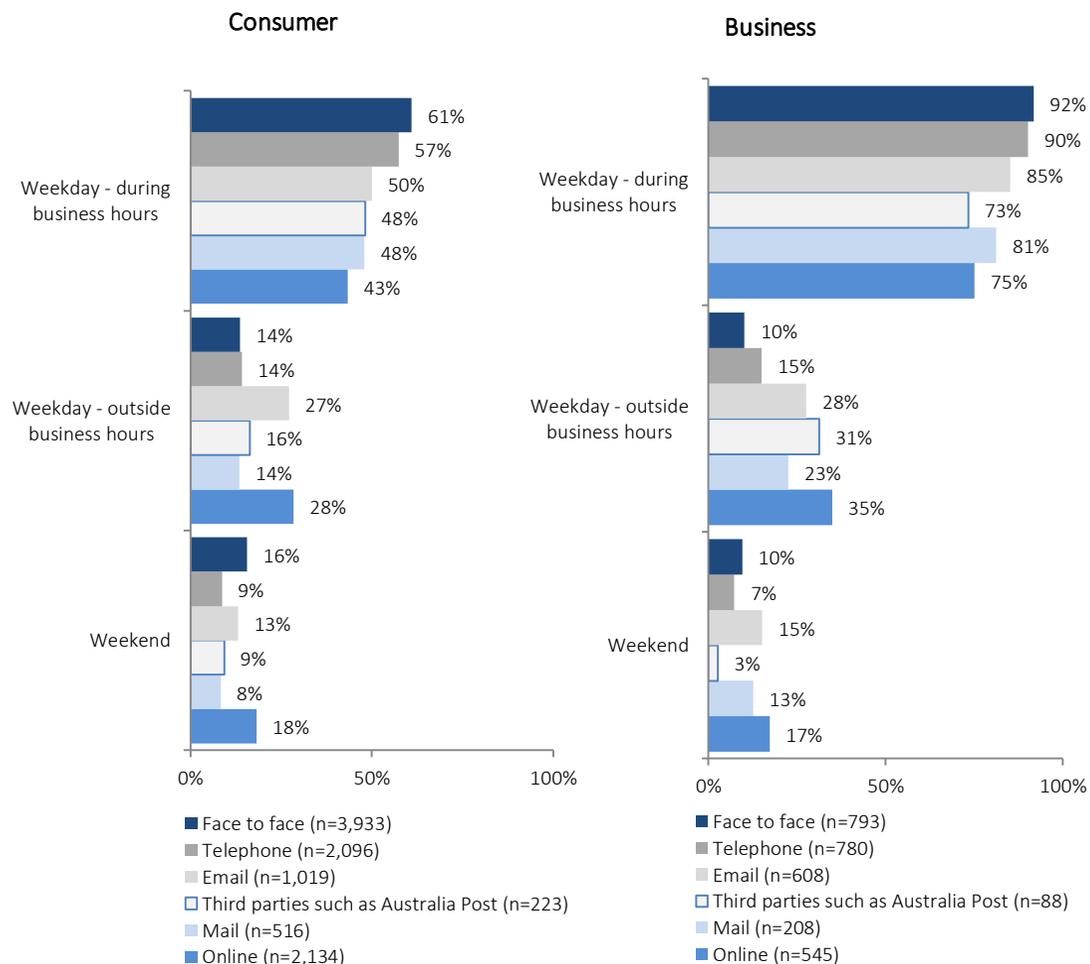
As observed in the range of contact methods preferred by business customers, these results demonstrate the need for multi-channel contact methods to best meet the needs of customers. This was also supported in the qualitative research where ease of access to services and flexibility were recognised as drivers of satisfaction.

“  ” *“Being able to do so much more online compared to 20/30 years ago is a complete god send, because before you didn't know who the right person was to go to”*

Source: qualitative research, business customer 

**Figure 5.6: 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...?”



Note: Figures displayed in graph may not sum to 100% due to rounding

# 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 compared to those customers who had no option.

Of those customers that use online, a significant proportion of customers chose to go online (83% of consumers, 78% of businesses) as opposed to being directed/prompted to go online (12% of consumers, 16% of businesses), or facing no other option (5% of consumers, 6% 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 8.2 out of 10 for consumers, and 7.9 out of 10 for businesses) than those who faced no other option (average satisfaction of 7.0 out of 10 for consumers, and 6.9 out of 10 for businesses).

Businesses who were directed or prompted to go online experienced a statistically significant increase in satisfaction compared to last year (by +1.4).

84% of consumers 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 78% of businesses.

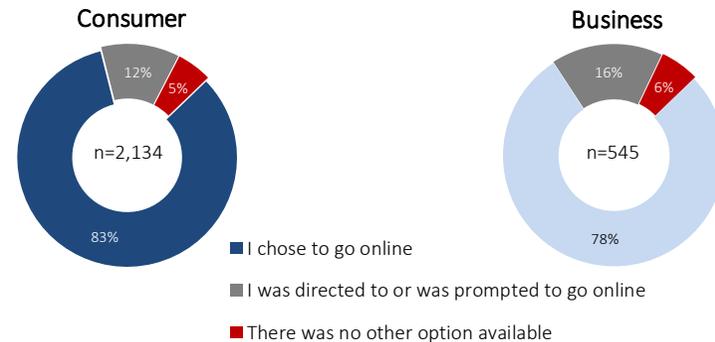
For those customers who felt there was no other option available but to go online, 17% of consumers “strongly disagree” that they were “satisfied with the overall experience of using the website/app to complete the task”, compared with 30% of businesses.

Figure 5.7 provides further detail on the choice to go online, and Figure 5.8 provides further detail about how this choice relates to satisfaction with website/app experience.

Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

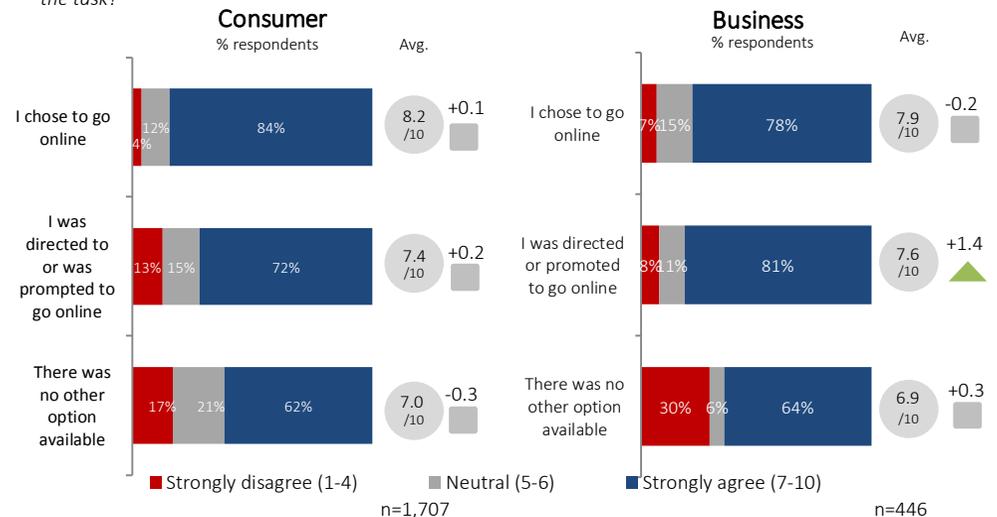
**Figure 5.7: Choice to go online**

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



**Figure 5.8: 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 Services Online

Smartphone use to access NSW Government services online has significantly increased this year compared to last.

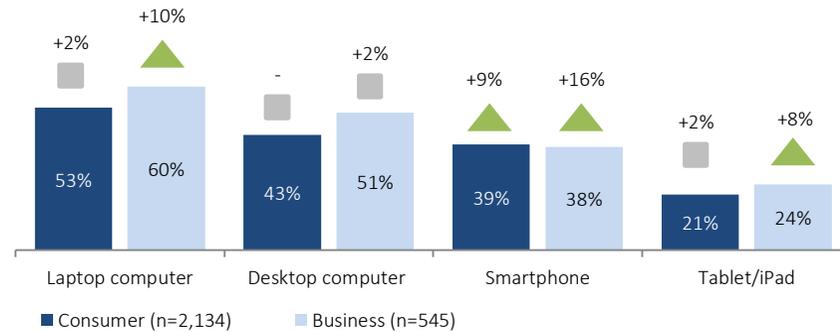
When dealing with NSW Government services online, customers most commonly access content from a laptop computer (53% of consumers and 60% of businesses – a statistically significant increase for businesses) or desktop computer (43% of consumers and 51% of businesses).

The use of smartphone devices to access online services has significantly increased this year for both consumer and business customers (statistically significant increase). Consumers' usage of smartphones to access online services has increased by 9% to 39%, and businesses' usage has increased by 16% to 38% since 2016. (Refer to Figure 5.9 for further detail).

However, satisfaction of the overall experience of using the website/app to complete the task was lowest when using smartphone devices to access services compared to other devices. Consumers' satisfaction with using smartphones to access services is 7.8 compared to the overall average of 8.0, whilst businesses' satisfaction with smartphone use to access services is 7.3 compared to the overall average of 7.5 (Refer to Figure 5.10 for further detail). As the NSW Government's digitisation journey continues, it will be important to ensure a consistent and seamless user experience for customers across all devices.

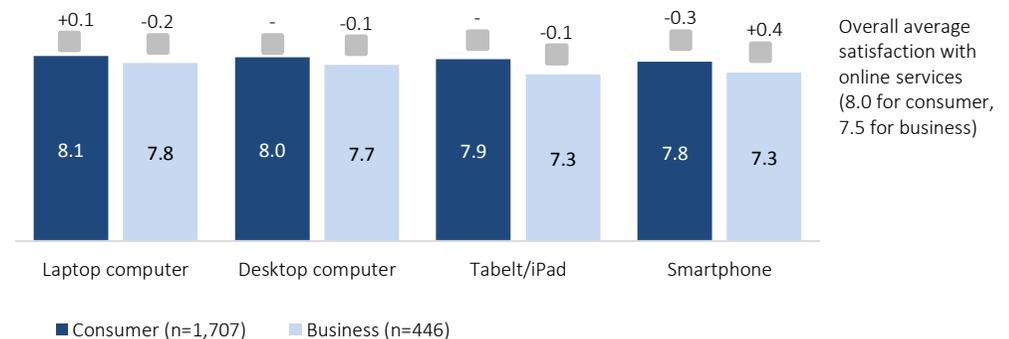
**Figure 5.9: Devices used for dealings with NSW Government services online (multi-select)**

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



**Figure 5.10: 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 2016 (at 99% level of Confidence)   
 No significant change in avg. from 2016 (at 99% level of Confidence)   
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



# Customer Identified Drivers of Digital Adoption

Consistent with 2016, improvements to navigation, security, availability and accuracy of content are most likely to increase satisfaction with and usage of online service contact methods.

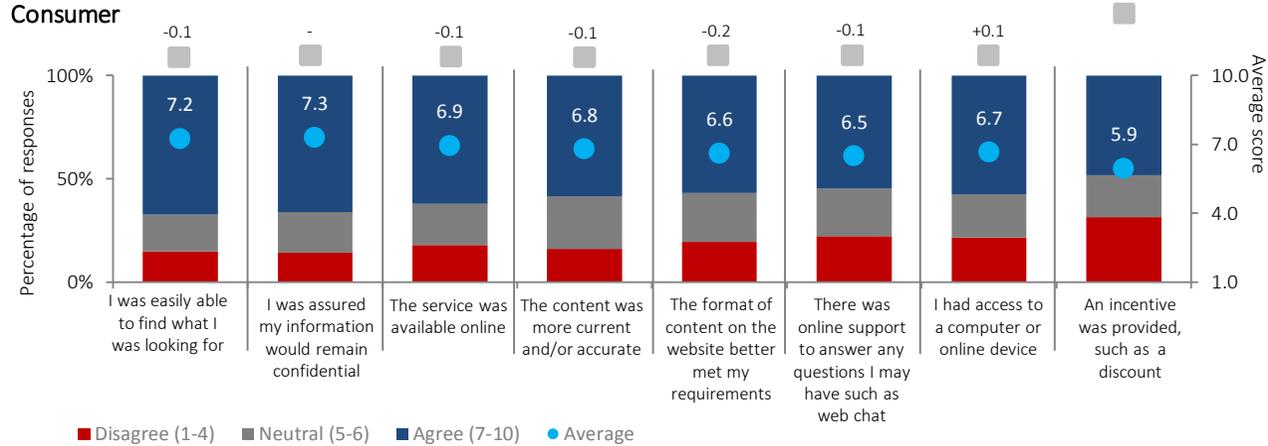
Customers who had not gone online to carry out direct dealings with NSW Government services in the last 12 months were asked to rate their level of agreement that certain improvements would encourage them to go online.

Consistent with 2016, customers who currently use other contact methods would be more likely to go online if navigation and confidentiality of information were improved. Incentives were identified by both consumers and businesses as the least likely driver to improve adoption for both consumers and businesses.

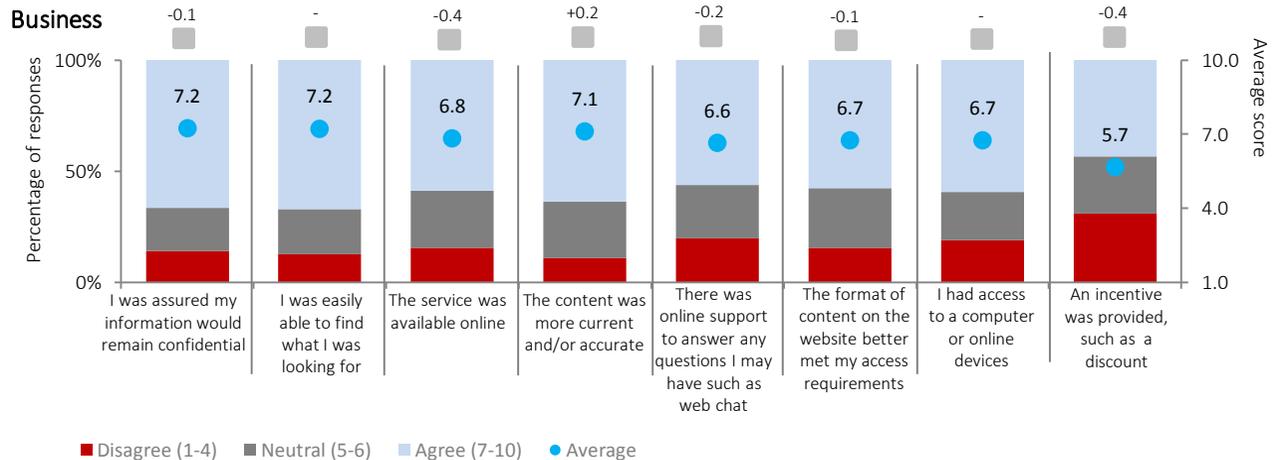
**Figure 5.11: Drivers of digital adoption: I would go online if...**

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..."

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



2017 n=1,857 2016 n=1,994



Legend:   
▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)   
■ No significant change in avg. from 2016 (at 99% level of Confidence)   
▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

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

2017 n=564

2016 n=592



## Customer Desire for Continued Digitisation of Key Processes

Suggested improvement ideas from customers include the digitisation of full processes to streamline procedures.

Additional qualitative research with customers allowed for a deeper understanding into the Whole of Government theme of online channel use and digitisation of the customer journey.

### Access is the main inhibitor of online use for Government services

- Access to computers or smartphones is one of the main reasons that customers do not go online.
- Customers acknowledged that some demographics are disadvantaged in the digital sphere, for example, elderly customers who are resistant to smartphone technology and who may require education or additional support.
- Forgetting usernames/passwords (e.g. for Opal) poses a user experience challenge.
- Customers are also frustrated when processes are not streamlined. For instance, forms are downloaded yet you have to go in person to submit them or when online forms are not fit for all purposes.

### Suggested improvement ideas from customers focus on increasing online presence of Government Services

- Information touch pads at key bus stops/ train stations that display announcements or service information for customers. This would increase access to information.
- Digitising online processes to provide a desired audit trail of case level detail to enable continuity of service between interactions.
- A social media presence (such as that of transport related services) which would elevate customer perceptions of transparency.
- Online tools being an effective way to provide accurate and reliable information. This in turn enhances perceptions of 'honest' and 'trustworthy' behaviours.

“  ”

*“The problem with phone is the person you speak with on Monday is different [to the one on Friday].”*

“  ”

*“Make it online... digital delivery, because everything I do is online and on my phone and that's the nature of 21st century.”*

*“Set up the website like ‘Compare the Market’ with the ability to track, compare and synthesise info...having an instant chat would also be useful”*

“  ”

Source: qualitative research, business customer

# Detailed Findings

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

2. Performance Against Customer Satisfaction Drivers - Key Findings 4, 5, 6, 7, 8

3. Complaints Handling - Key Finding 9

4. Comparison of Performance by Geography - Key Finding 10

5. Perceptions and Adoption of Online Usage - Key Findings 11, 12

6. Comparison of performance to other jurisdictions - Key Finding 13

## Comparison of Performance Across to Other Jurisdictions

### Key Findings Covered in this Section:

- **Key Finding 13a:** For consumers, the NSW Government is the only jurisdiction which experienced a significant increase in both satisfaction and expectation from 2016 to 2017.
- **Key Finding 13b:** For consumers, the NSW Government has a positive 'brand' perception when compared to other industries, which is consistent across jurisdictions.

### Areas covered in this section

1. Comparison of Satisfaction and Expectation.....p. 81
2. Comparison of Expectation Gap and Ideal.....p. 82
3. Customer Perceptions of the Public Service 'Brand' .....p. 83
4. Comparison of Customer Views of Performance Attributes .....p. 87
5. Comparison of Complaints Handling Processes.....p. 91
6. Differences in Contact Methods.....p. 94

### Summary Findings

- NSW and Queensland are the strongest performing jurisdictions for consumer satisfaction and expectation scores.
  - NSW is in equal lead position among both consumers (and businesses) for satisfaction of services provided by their Government and achieved a statistically significant increase this year compared to last year among consumers.
  - There is little differentiation across jurisdictions in consumer expectations of Government services, however, NSW is the only jurisdiction to have had a statistically significant increase in 2017 for consumer expectations, meaning NSW now leads all jurisdictions along with Queensland in terms of expectations of service.
- International jurisdictions New Zealand and Canada perform more strongly among businesses. New Zealand leads satisfaction among businesses and Canada shows highest expectation scores, while NSW has statistically declined in this measure this year compared to last. Interestingly, businesses in Canada have the highest expectation gap of their Government services, but are also most likely to rate them closer to ideal than businesses in other jurisdictions.
- Performance attribute scores provide insight into why Canada rates highly on ideal among businesses and New Zealand high on satisfaction among businesses.
  - Canadian businesses are more likely than other jurisdictions to believe their Government employees are 'honest', with higher ratings for this attribute among Canadian businesses.
  - New Zealand businesses rate their Government services' employees higher than all other jurisdictions for several attributes including 'communicates well' and 'do what they promise'. Furthermore, New Zealand leads on all process related attributes including 'service feels seamless' and 'employees are empowered to make decisions'.
- Business participants in all jurisdictions are more likely than consumers to report having made a complaint to a Government service. Canada leads in complaints handling; despite businesses in Canada having the greatest proportion of those who have made a complaint within the past 12 months, they have the greatest satisfaction with the complaints handling process and the greatest proportion who claim it was easy to make a complaint.
- Across jurisdictions, face-to-face is the most common method used to contact government services for both consumers and businesses. Online usage varies by jurisdiction, yet NSW has the highest online usage for both businesses and consumers. Among consumers, NSW achieves highest satisfaction the experience in interacting with services online—a clear strength of this jurisdiction.

# Comparison of Performance Against Customer Satisfaction and Expectation

NSW is on par for 1st position among both consumers and businesses for satisfaction of services provided by their Government.

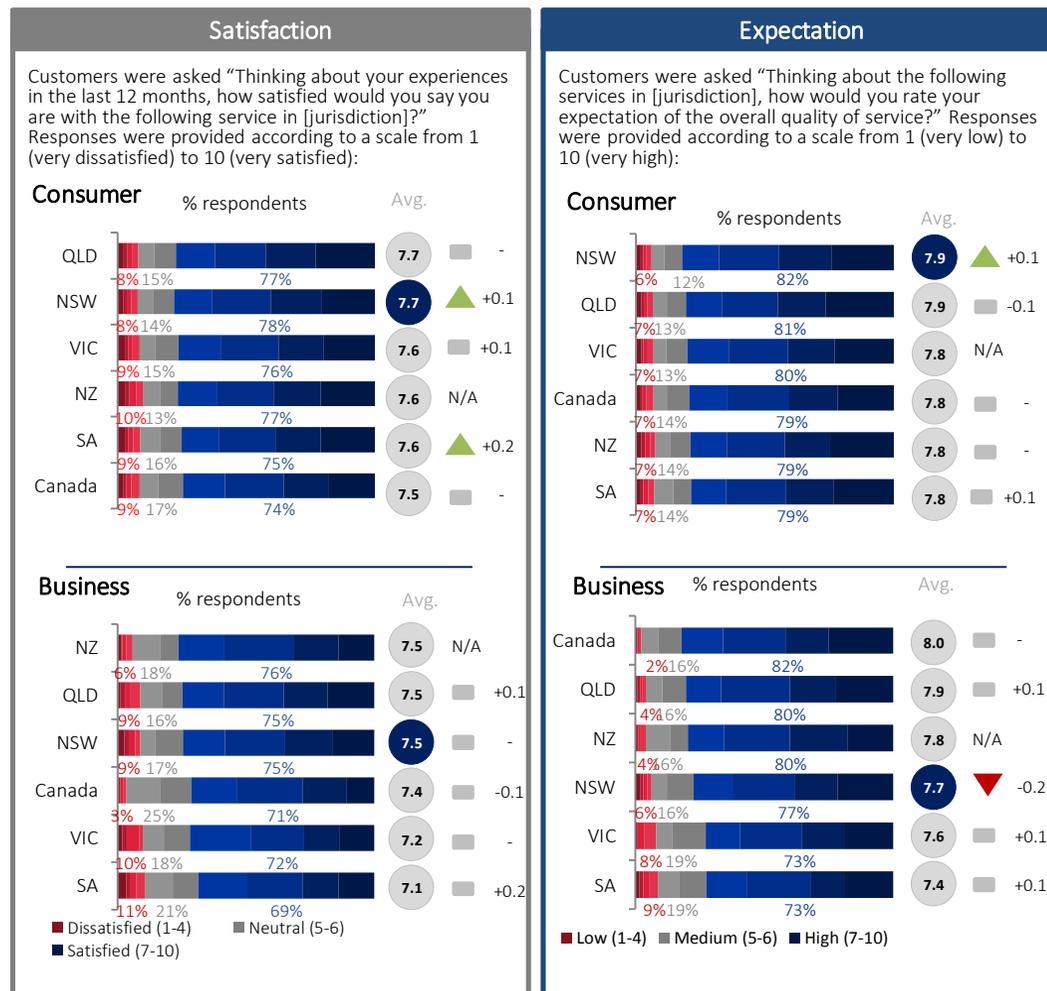
Consumer satisfaction has improved statistically significantly since 2016 in NSW, placing the state in equal lead position with QLD.

There is little differentiation across jurisdictions in consumer expectations of Government services, ranging from 7.8 in SA, to 7.9 in NSW. However, NSW is the only jurisdiction to have had a statistically significant increase in 2017 for consumer expectations, meaning NSW and QLD lead all jurisdictions in terms of expectations of service.

Among businesses, satisfaction with Government services has remained largely stable since 2016 across all jurisdictions with small improvements (insignificant) in QLD and SA and a slight decline in Canada. NSW has the equal highest satisfaction among businesses (with NZ and QLD).

There is greater variation in expectation scores for businesses than compared to consumers, ranging from 8.0 for Canada and 7.4 for SA. NSW is the only jurisdiction with a decline in business expectations, down 0.2 since 2016 to 7.7 (statistically significant).

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



Note: Percentages displayed in graph are subject to rounding

Legend:   
▲ Statistically significant increase in avg. from 2016 (at 99% level of Confidence)   
■ No significant change in avg. from 2016 (at 99% level of Confidence)   
▼ Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)

## Comparison of Gap to Expectations and Ideals Across Jurisdictions

The negative expectation gap scores for all jurisdictions indicates that government services are consistently underperforming to customer expectations.

Customer satisfaction with the experience delivered by government services in all jurisdictions is consistently below expectations, whereby expectation gap scores are negative for all jurisdictions, consistent to 2016 findings.

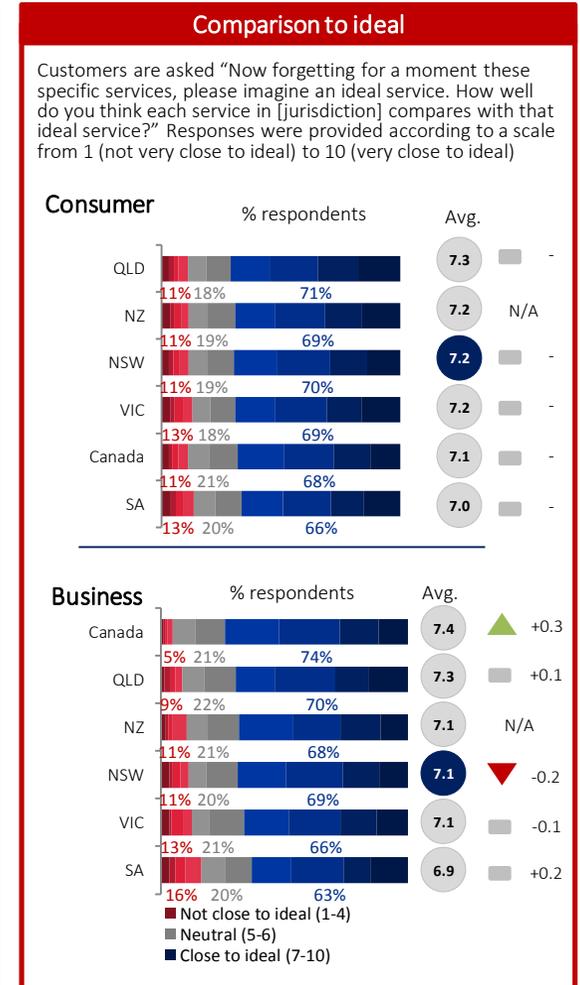
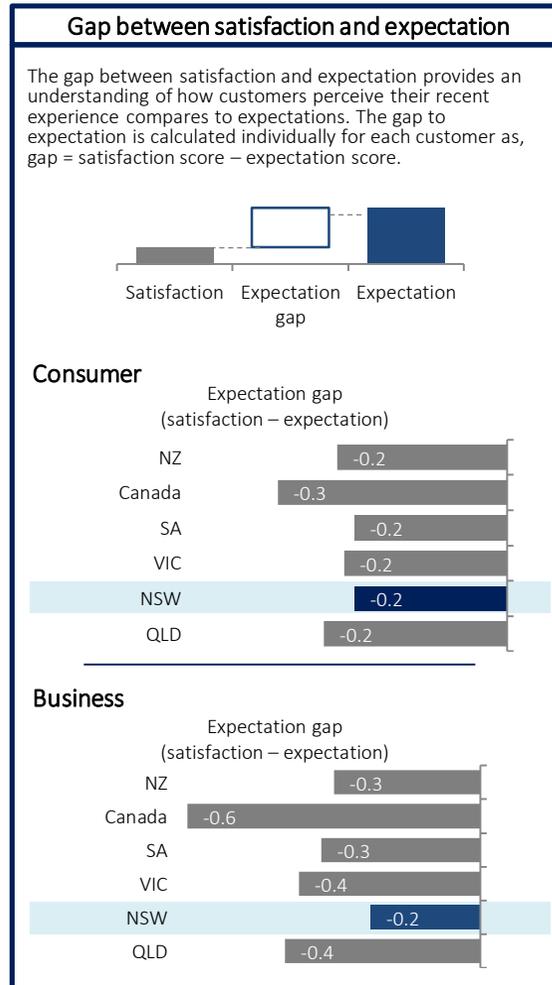
For consumers, the average gap between satisfaction and expectation is -0.2 in NSW, which is on par with other jurisdictions (ranging from -0.2 to -0.3).

Among businesses, the gap to expectation is smallest for NSW Government services (-0.2) and is largest for Canadian Government services (-0.6).

For comparison to ideal, NSW rates better than average (70%) when comparing NSW to an 'ideal' service (7-10 out of 10). Other jurisdictions range from 66% to 71% for Queensland in the lead.

Businesses in Canada have the highest expectation gap of their Government services, but are also more likely to rate them closer to ideal than businesses in other jurisdictions.

**Figure 6.2: Comparison of performance to expectations and perceptions of an ideal service across jurisdictions**



Note: Percentages displayed in graph may not sum due to rounding

# 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'.

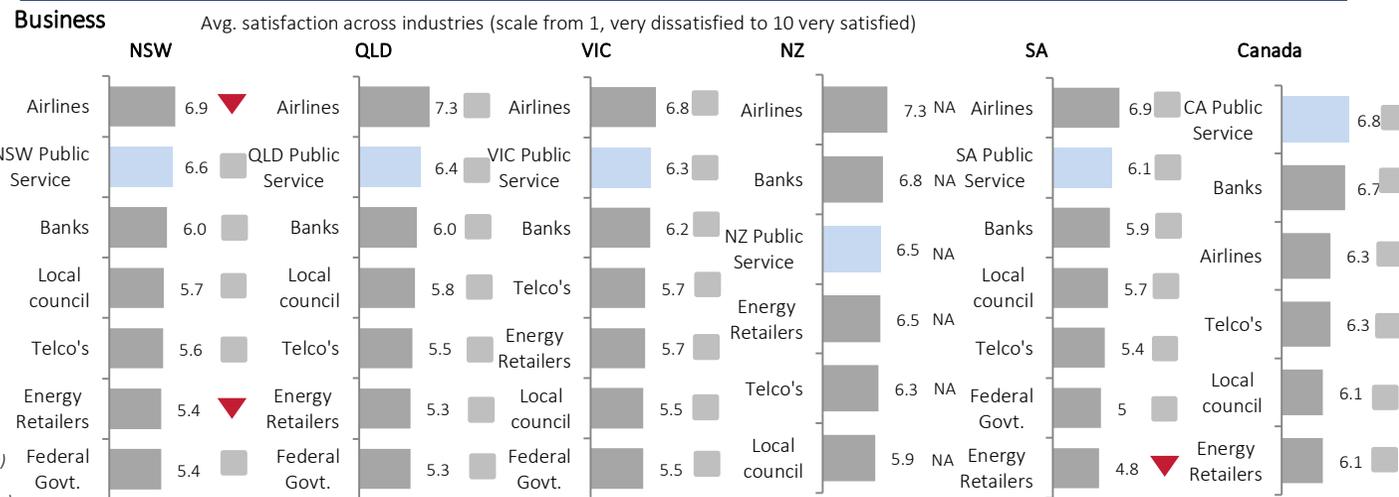
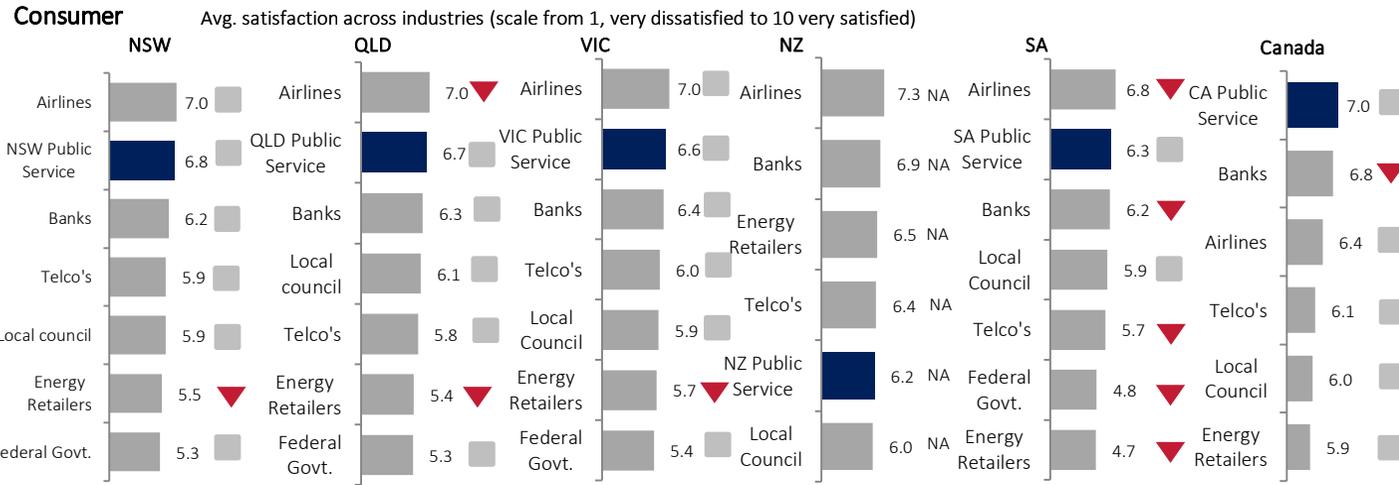
For consumers, the Canadian Public Service remains a standout performer relative to other industries with an average score of 7.0 out of 10, and brand perceptions ahead of all other industries within that jurisdiction.

Consumers' perceptions of the NSW Public Service have remained stable between 2016 to 2017, ranking between airlines and banks. A similar trend is observed in all other Australian jurisdictions.

NZ proves to be the more challenging jurisdiction for the Public Service 'brand'. It performs below all other industries except Local Government among consumers. Performance is better among businesses however NZ Public Service falls behind Banks where in other jurisdictions its ahead.

**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?"



Legend:  Statistically significant increase in avg. from 2016 (at 99% level of Confidence)  
 No significant change in avg. from 2016 (at 99% level of Confidence)  
 Statistically significant decrease in avg. from 2016 (at 99% level of Confidence)



## Comparison of Descriptors of the Public Service ‘Brand’

Consistent with findings against ‘brand’, sentiment towards the NSW Public Service are also on par with other Australian jurisdictions.

Customers across all six 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 consumers’ sentiments towards the NSW Government are most similar to sentiments towards other Australian jurisdictions. The New Zealand Public Service is most likely to be associated with negative descriptors, which reflects its performance below other industries within NZ.

The Canadian Public Service, which is a standout performer relative to other industries in Canada, is more likely than the NSW Public Service to be associated with the positive descriptors of ‘capable’, ‘knowledgeable’ and ‘respectful’, and is less likely to be associated with the negative descriptors of ‘wasteful’, ‘patronising’ and ‘lazy’.

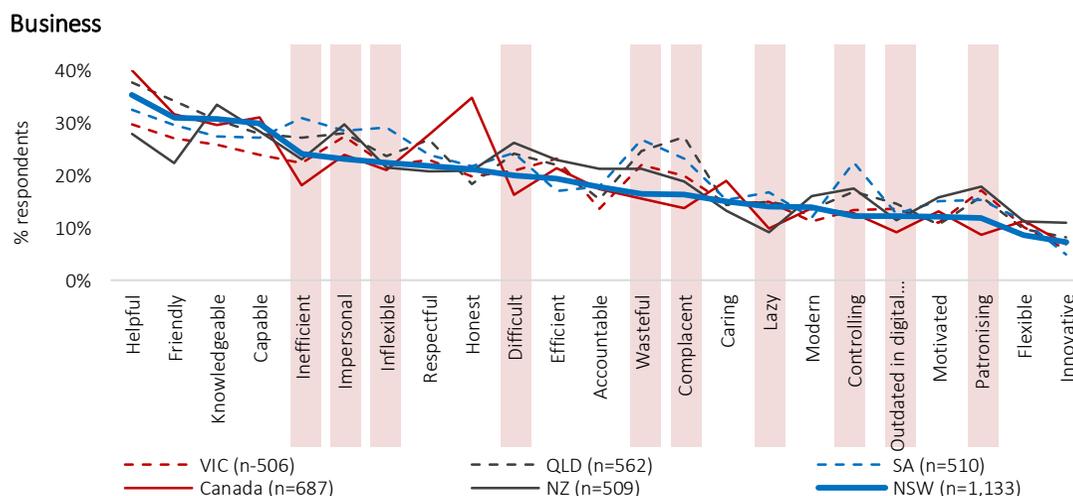
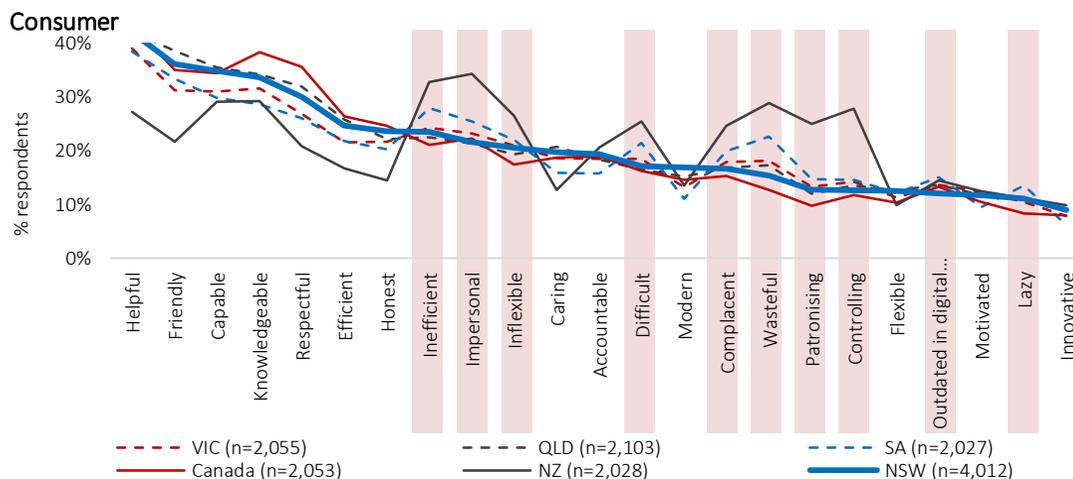
Overall, the NSW Public Service is more likely than its Australian counterparts to be associated with positive descriptors, and is less likely to be associated with negative descriptors.

Among businesses, the Canadian Public Service outperforms all other jurisdictions on ‘honest’, indicating that this ‘brand’ element is a key driver of favourable perceptions among businesses.

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

**Figure 6.8: Comparison of descriptors of the Public Service overall across jurisdictions**

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





## Comparison of Customer Views on Performance Against Employee Related Attributes

There is little differentiation in perceptions of Government services' employees across jurisdictions.

Across jurisdictions, similar trends are observed in the perceptions of Government employees' performance against attributes. (Refer to Figure 6.9 for further detail).

Across all included jurisdictions, for both consumers and businesses, Government 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 7.3 to 7.9 for businesses across these 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 6.6 to 7.0 for businesses across all attributes).

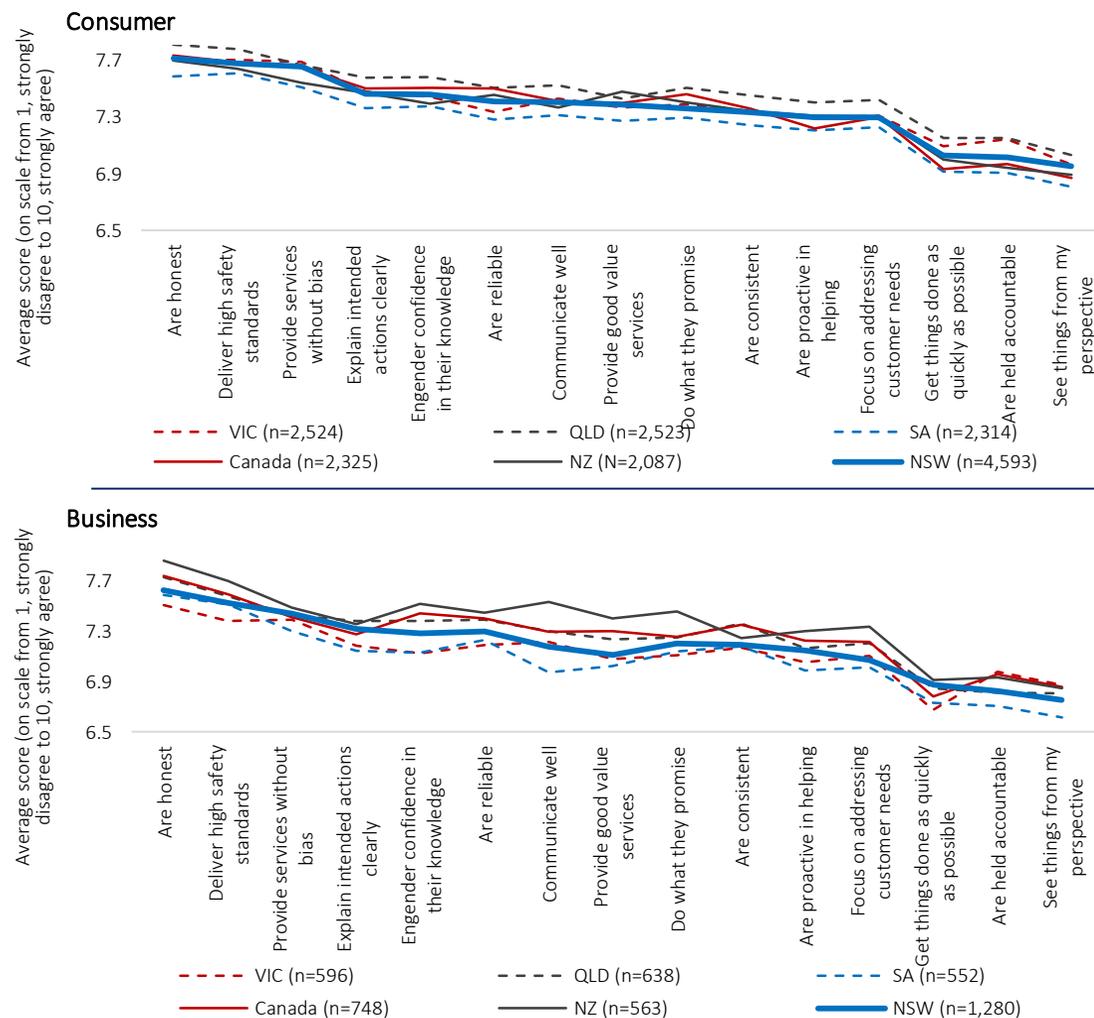
NSW Government services performs equal best compared to other jurisdictions on 'provide service without bias' (7.7) and 'see things from my perspective' (7.0), among consumers, and 'get things done as quickly as possible' (6.9) among businesses.

NZ businesses rate NZ Government services' employees higher than all other jurisdictions for several attributes including 'communicates well' (7.5) and 'do what they promise' (7.5). This provides an indication as to why NZ businesses rated their overall satisfaction with NZ Government services highly.

NSW could learn from QLD which outperforms NSW on many of the employee attributes among consumers and NZ who outperforms NSW amongst businesses on these attributes

**Figure 6.9: 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]?" Ranked on NSW consumer scores





## Comparison of Customer Views of Performance Against Value Attributes

Across jurisdictions, there is a similar pattern relating to perceptions of the value attributes embodied by Government services, such as 'operates with integrity' which is the top rated value for both businesses and consumers across all jurisdictions.

Among consumers, QLD is the top performing jurisdiction for perceptions of value attributes, followed by NSW. Interestingly, Canada performs below NSW on values attributes despite being a standout performer in terms of 'brand' perception against other industries in Canada.

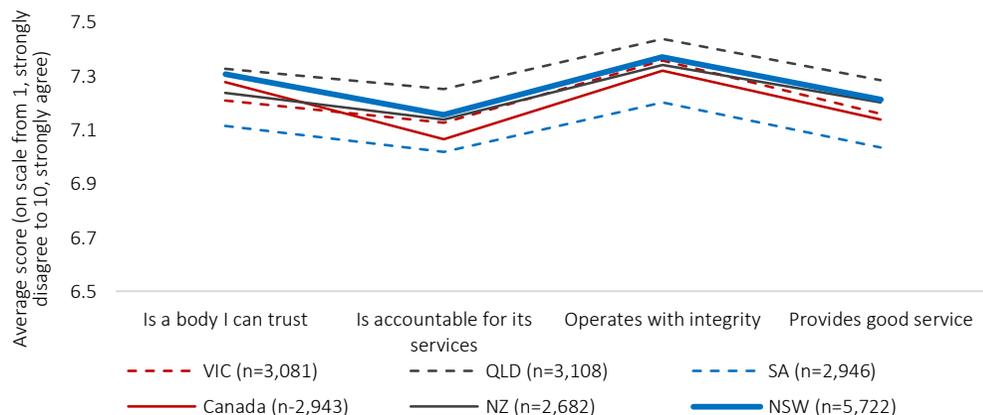
Among businesses, NZ is the strongest performer on most values attributes, except 'integrity', where Queensland and Canada have stronger performance.

Across all jurisdictions, accountability for services and providing a good service are rated lower than trust and integrity. These are two improvement opportunity areas for NSW.

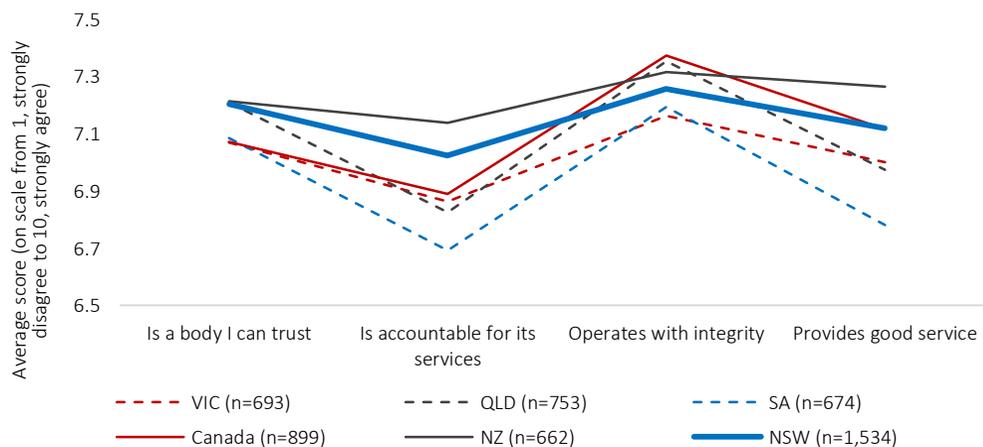
**Figure 6.10: Comparison of performance against each of the values**

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



NSW could learn from NZ to improve value attribute performance among businesses, in particular NZ services which are more likely to be identified as 'accountable' and 'providing good service' than other jurisdictions.

## Comparison of Customer Views on Performance Against Process Attributes

Across jurisdictions, average performance among businesses across process related attributes is lower than for the other attribute categories. This suggests that delivering simple and efficient processes is a challenge for all governments.

Across jurisdictions, there is little differentiation in the perceived performance of government services against process related attributes among consumers. ‘Easy to understand’ processes are the highest rated process attributes and ‘designed to reduce wait times’ is lowest. Overall, the execution of processes (wait times, getting the right person the first time, seamless service and empowered employees) all have lower scores and this pattern is consistent across jurisdictions.

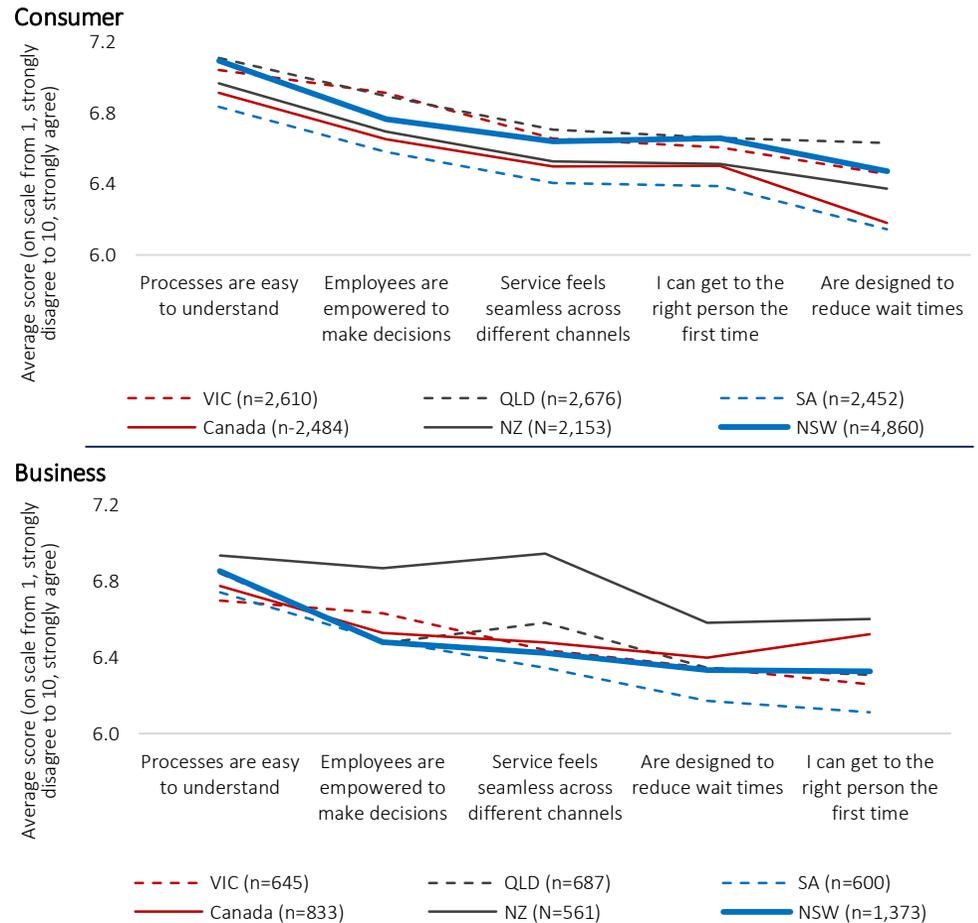
Among consumers, NSW Government services performs equal highest on ‘processes are easy to understand’; and ‘I can get to the right person the first time’.

Among businesses, NZ leads other jurisdictions across all process related attributes. This provides supporting evidence as to why NZ businesses had high levels of satisfaction with NZ Government services overall.

Comparing the range of scores across jurisdictions, NSW Government services performs equal lowest among businesses on ‘employees are empowered to make decisions’, on par with South Australia. This highlights an area of improvement opportunity.

**Figure 6.11: Comparison of performance against each of the process attributes**

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



## Comparison of Customer Views on Performance Against Goal Attributes

There is a similar trend of performance on goal related attributes across all jurisdictions and customer groups, with strongest performance for ‘privacy and confidentiality’ and weakest for ‘public participation in decision making’.

Across jurisdictions, there is little differentiation in the perceived performance of government services against goal attributes relating to the access and transparency of government services. (Refer to Figure 6.12 for further detail).

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

Among consumers, there is greater differentiation across the jurisdictions on ‘best use of online services’ where NSW performs strongest on this measure (7.0) compared to Canada and South Australia (6.6).

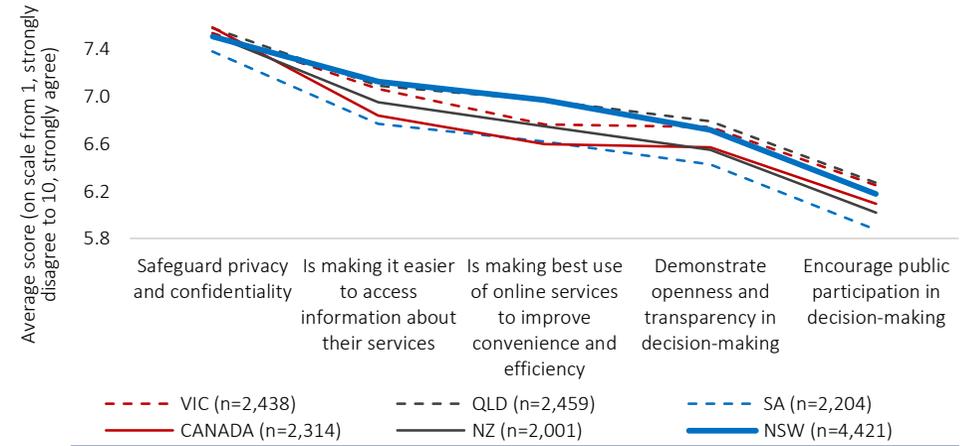
Across jurisdictions, the greatest variance is in ‘encourage public participation in decision making’, with Canada and NZ businesses setting the bar at 6.4 out of 10.

NSW should share learnings with other jurisdictions for success in online use among consumers

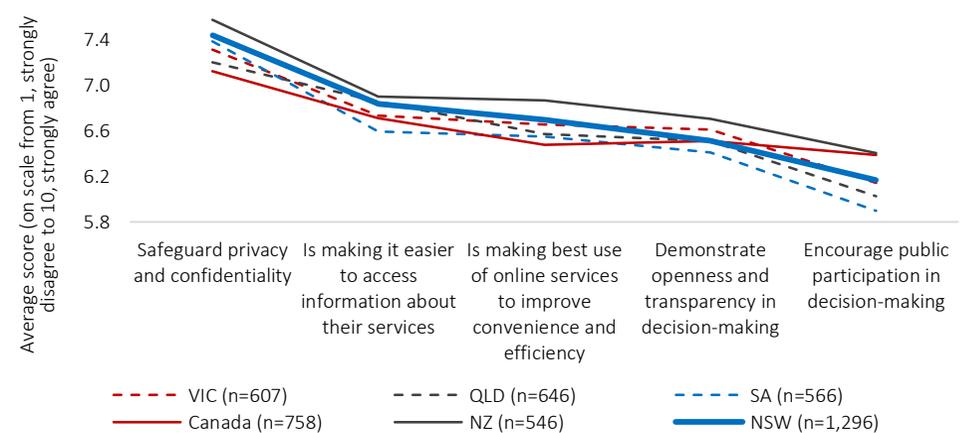
**Figure 6.12: Comparison of performance against NSW Government goals**

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



## Comparison of Complaints Received Across Jurisdictions

Across each of the six jurisdictions business participants are more likely than consumers to report having made a complaint to a Government service.

Among consumers across all jurisdictions, around 1 in 5 participants reported having made a complaint to a Government service in the last 12 months (ranging from 20% in Canada to 24% in Victoria and Queensland).

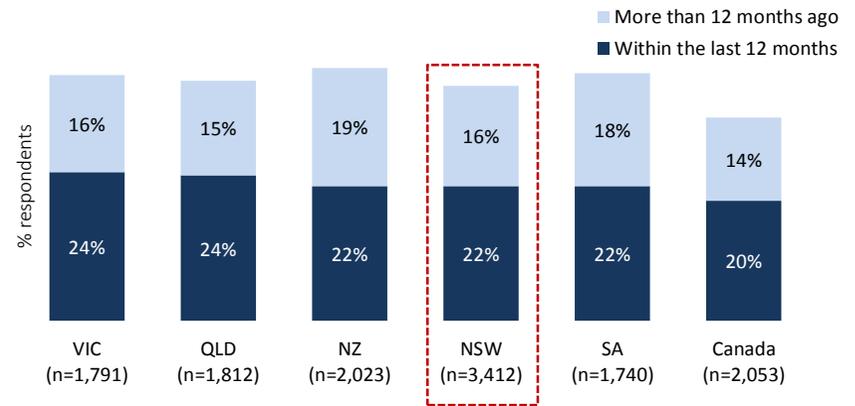
In line with 2016 findings, a higher proportion of complaints are reported by business participants, with the proportion for 2017 data ranging from 28% in Queensland to 38% in Canada.

Interestingly, Canada has the lowest number of reported complaints in the last 12 months among consumers, but the highest among businesses. These high rates of complaints by Canadian businesses may relate to the high expectation scores for Canadian businesses. We could infer that due to high expectations, Canadian businesses actively make complaints to ensure Government Services are meeting their needs.

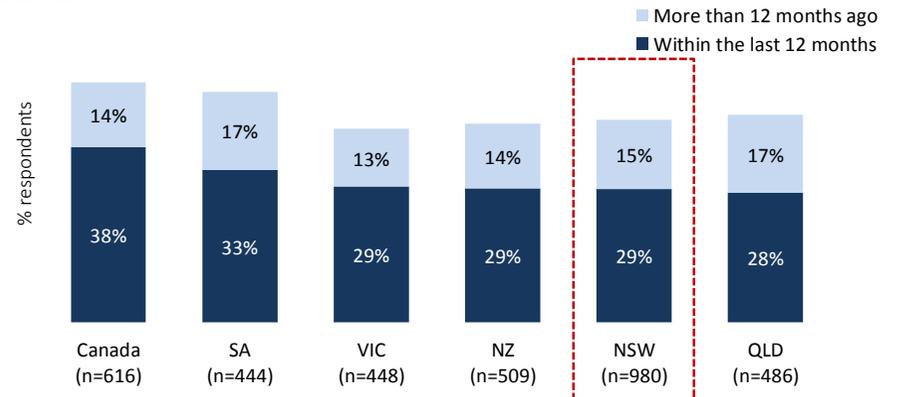
**Figure 6.13: Proportion of customers who made a complaint in the last 12 months or more than 12 months ago by jurisdiction**

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 Across Jurisdictions

There is little differentiation in perceptions of the quality of complaints handling across jurisdictions among consumers.

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

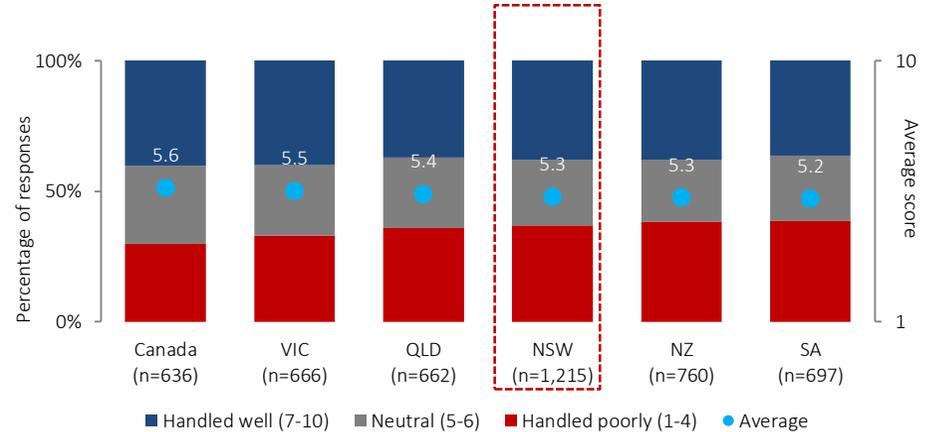
Overall, scores for complaint handling are neutral with all scores across jurisdictions between the range of 5.2 and 6.1 out of 10.

Canada receives the highest average complaint handling score for both customers and businesses, followed by Victoria. The comparatively high scores for Canada are consistent with findings from last year, however, Victoria has shown comparative improvement in complaint handling this year from having the second lowest average scores in 2016 to the second highest average scores for 2017 of all jurisdictions for both consumer and business.

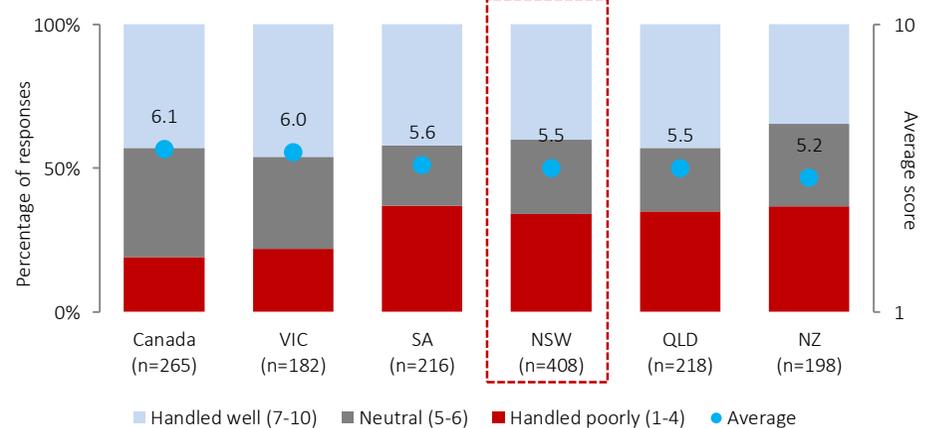
**Figure 6.14: Variation in complaints handling across jurisdictions**

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

### Consumer



### Business



 NSW results

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 Jurisdictions

For consumers, NSW is on par with other jurisdictions for the ease of making a complaint, but for businesses NSW ranks behind Canada and Victoria.

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

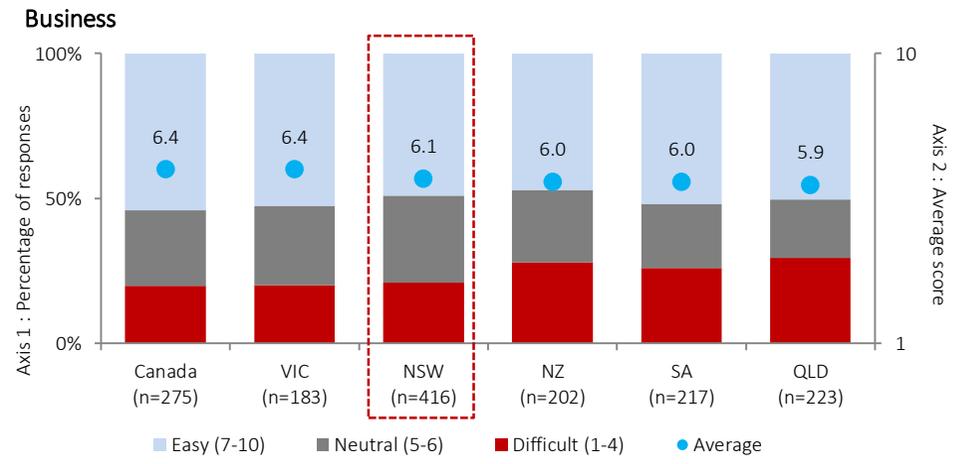
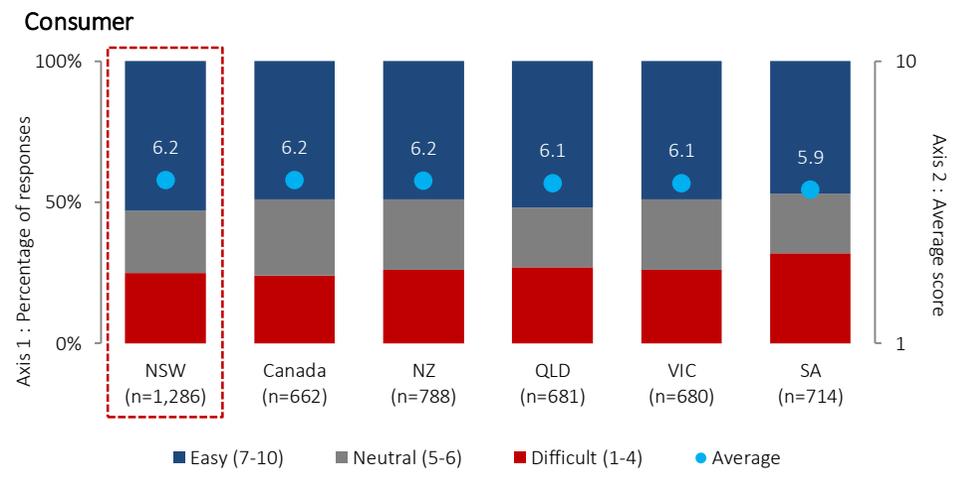
For consumers, while there is little differentiation in the ease of making a complaint among the jurisdictions, NSW performs on par with Canada and New Zealand, with other Australian jurisdictions lagging slightly behind.

Among businesses, Canada and Victoria receive the highest scores for the ease of making a complaint across the jurisdictions. NSW may learn from these jurisdictions to further improve ease of process.

Overall, customers are generally 'neutral' in rating the ease of making a complaint which indicates further opportunity for improvement.

**Figure 6.15: 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):

 NSW results



## Differences in Contact Method Used Across Jurisdictions

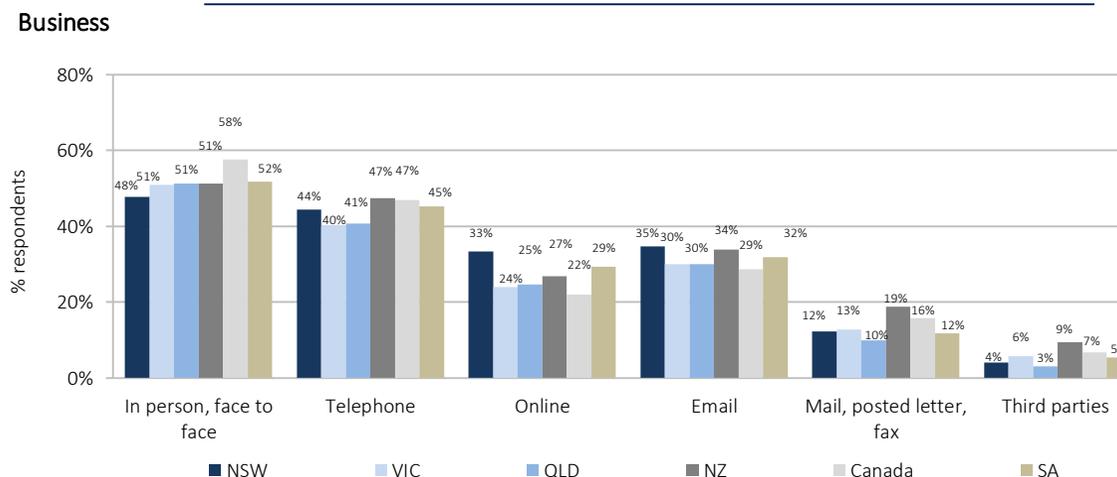
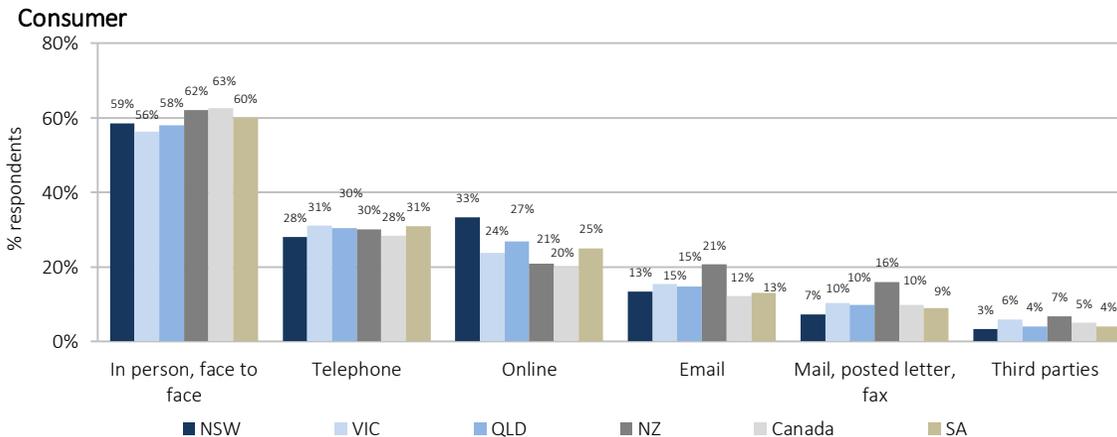
Across jurisdictions, face to face is the most common method used to contact government services for both consumers and businesses. Online usage varies by jurisdiction, with NSW having the highest online usage for both businesses and consumers.

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

Face to face remains the most common contact method for all customers and jurisdictions. However, more customers have gone online to interact with Government services in NSW in the last 12 months than in other jurisdictions. Online is the second most used contact method for NSW consumers and fourth for businesses (behind face to face, telephone and email).

**Figure 6.16: 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?"



## Differences in Contact Method Preference Across Jurisdictions

Channel preferences follow a similar pattern across jurisdictions, with face to face being the most preferred channel for both businesses and consumers.

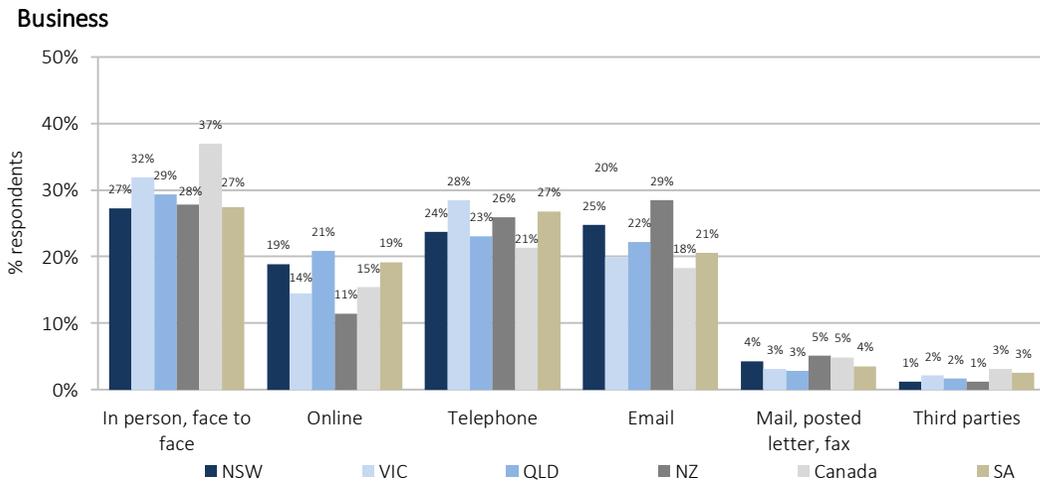
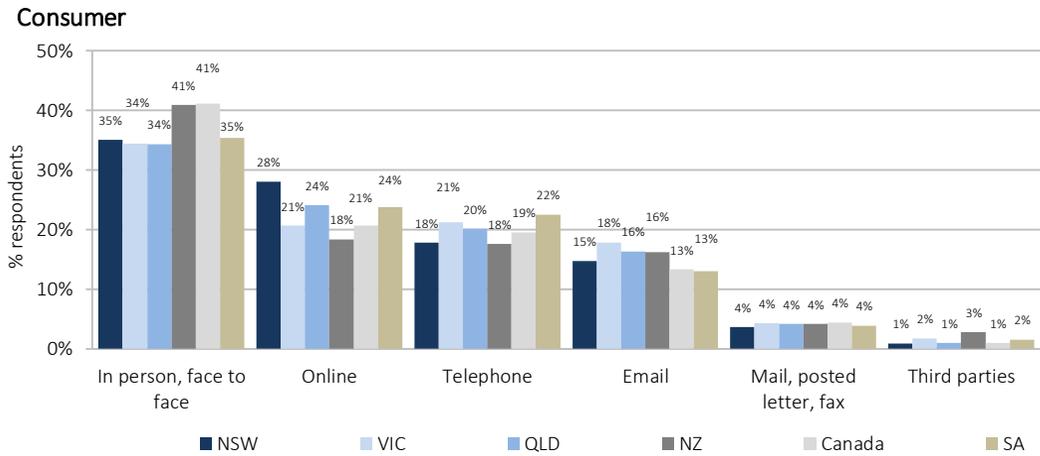
Customers across each of the jurisdictions were asked about their preferred contact methods for dealing with Government services in the future.

Jurisdictions generally followed a similar pattern of preferred contact method. The contact method most preferred by consumers across jurisdictions was face-to-face followed by online. Consumers in NSW were the more likely of any jurisdiction to prefer online contact.

Businesses have a broader range of preferences for channels to contact Government services, with face to face, telephone and email being the top 3 across all jurisdictions, followed by online. All businesses, no matter the jurisdiction, require multi-channel service access.

**Figure 6.17: Preferred contact methods 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?"





## Differences in Satisfaction with Online Services Across Jurisdictions

Scores for satisfaction of attributes relating to online services vary widely for business customers across jurisdictions.

Among consumers, NSW outperforms or equals other jurisdictions on most attributes relating to the provision of online services – a clear strength of this jurisdiction. In comparison, Canada has lower overall scores for customer satisfaction with its online services.

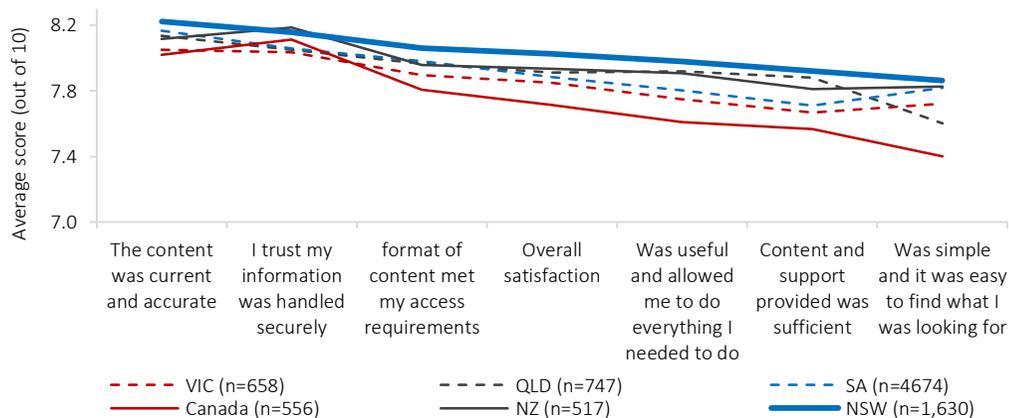
Accuracy and trust in online content are the top performing attributes across all jurisdictions, with little differentiation among jurisdictions.

Among businesses, NSW leads other jurisdictions on trust in online services, but sits behind VIC and NZ in relation to many other attributes of online services including ease of finding what businesses are looking for, and content and support was sufficient.

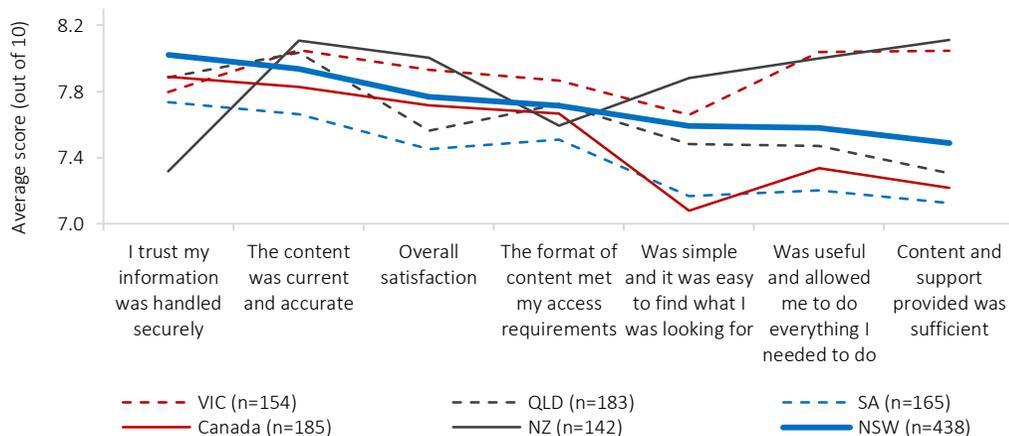
**Figure 6.18: Satisfaction with attributes of Online Services**

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 Satisfaction



### Business Satisfaction



# Differences in Satisfaction with Government Services by Contact Method Across Jurisdictions

Across all jurisdictions, satisfaction with Government services is higher among customers who have accessed Government services online compared to other channels.

For consumers, satisfaction with Government services is highest among consumers who have accessed services online compared to other channels and this is consistent for all jurisdictions.

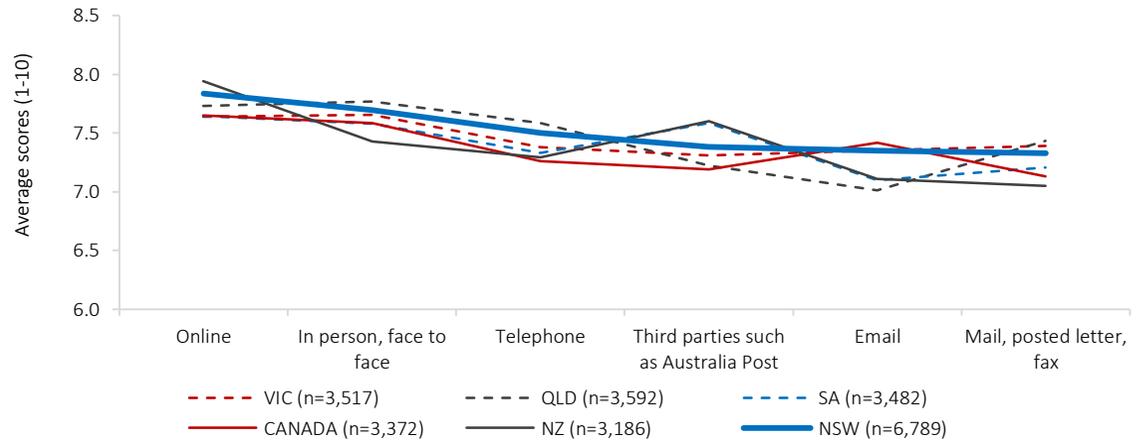
SA and NZ consumers show relatively high satisfaction with third party contact methods however, these jurisdictions go against the general trend which shows highest satisfaction for online, face to face and telephone contact methods.

Satisfaction by contact method shows greater variation among businesses. Some jurisdictions, including NSW, VIC and NZ show highest levels of satisfaction when accessing services online. Other jurisdictions, including QLD, SA and Canada, show highest levels of satisfaction when accessing services in person.

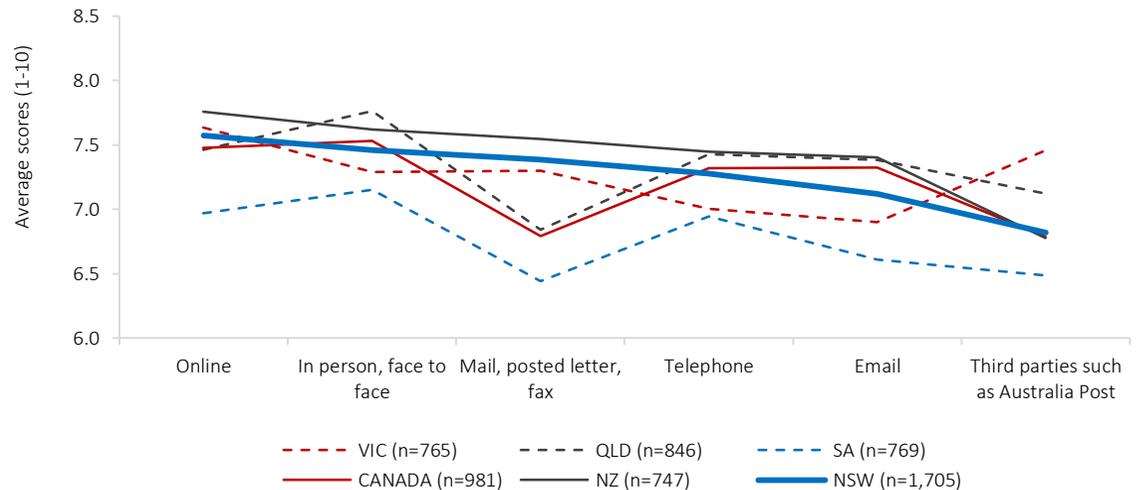
**Figure 6.19: Overall satisfaction with Government services by contact method(s) used across jurisdictions**

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 Satisfaction



### Business Satisfaction



# Appendices

Further technical information



## Approach to in-field management

The following steps were taken during data collection to support the achievement of a representative sample of respective populations across jurisdictions.

<b>Drafted sampling frame</b>	<p>Drafted sampling frame and set target quotas to ensure responses are representative of the jurisdiction populations based on the following key variables (consistent with the previous year):</p> <ul style="list-style-type: none"><li>• Consumer by age, gender and region of residence (metropolitan, regional and rural)</li><li>• Business by business size (estimated based on number of employees) and location (metropolitan, regional and rural)</li><li>• Minimum targets were also set to achieve representativeness across government services of n=100 for NSW Consumer and n=50 for all other surveys.</li></ul>
<b>Programmed and tested survey</b>	<ul style="list-style-type: none"><li>• A single dynamic survey was programmed for QLD, NSW and VIC for each of business and consumer to optimise responses. Separate surveys were programmed for NZ and Canadian businesses and consumers.</li><li>• Logic was built into the survey which optimally allocated respondents to those services for which feedback proved to be most difficult to solicit in 2017. Ultimately numbers will likely fall short on targets for a few key services however the result produced is an improvement on the previous year.</li><li>• Once the survey was programmed, rigorous testing was undertaken to ensure there were no breaks in the survey logic.</li><li>• A survey usability review was also undertaken by a UX consultant to optimise visuals and ensure accessibility for all users.</li></ul>
<b>Undertook a survey pilot</b>	<p>A survey pilot was undertaken over a 24 hour period and targeted to n=100 respondents to:</p> <ul style="list-style-type: none"><li>• Ensure there are no errors in the survey programming</li><li>• Ensure we are yielding quality responses by checking:<ul style="list-style-type: none"><li>• Quality of data entry and recording (e.g. respondents are providing considered responses, questions posed are applicable to the majority of respondents)</li></ul></li><li>• Check incidence rates to ensure the total number of panel members being targeted is sufficient to achieve the required sample within the time frames. This includes analysis of panel response rates and analysis of screen outs from the survey from which to identify root causes and proposed actions to fill quotas within the time frames.</li><li>• Results of the pilot revealed no errors in the survey and the survey was then progressed to full launch.</li></ul>
<b>Daily monitoring of surveys while in field</b>	<ul style="list-style-type: none"><li>• Daily monitoring of surveys while in field to check progress and inform targeted action to ensure sufficient representative sample was achieved. This included additional targeting of business customers and hard to reach services based on respondent profiles.</li><li>• For the Annual CSMS, every attempt is made to reach as much of the sample as possible for services that have lower sample sizes</li></ul>

# Methodology to identify overall drivers of Satisfaction

Consistent with 2015 and 2016, a two-step analysis method was followed to identify the key drivers of satisfaction with NSW Government services which are in turn the drivers of the composite customer satisfaction index

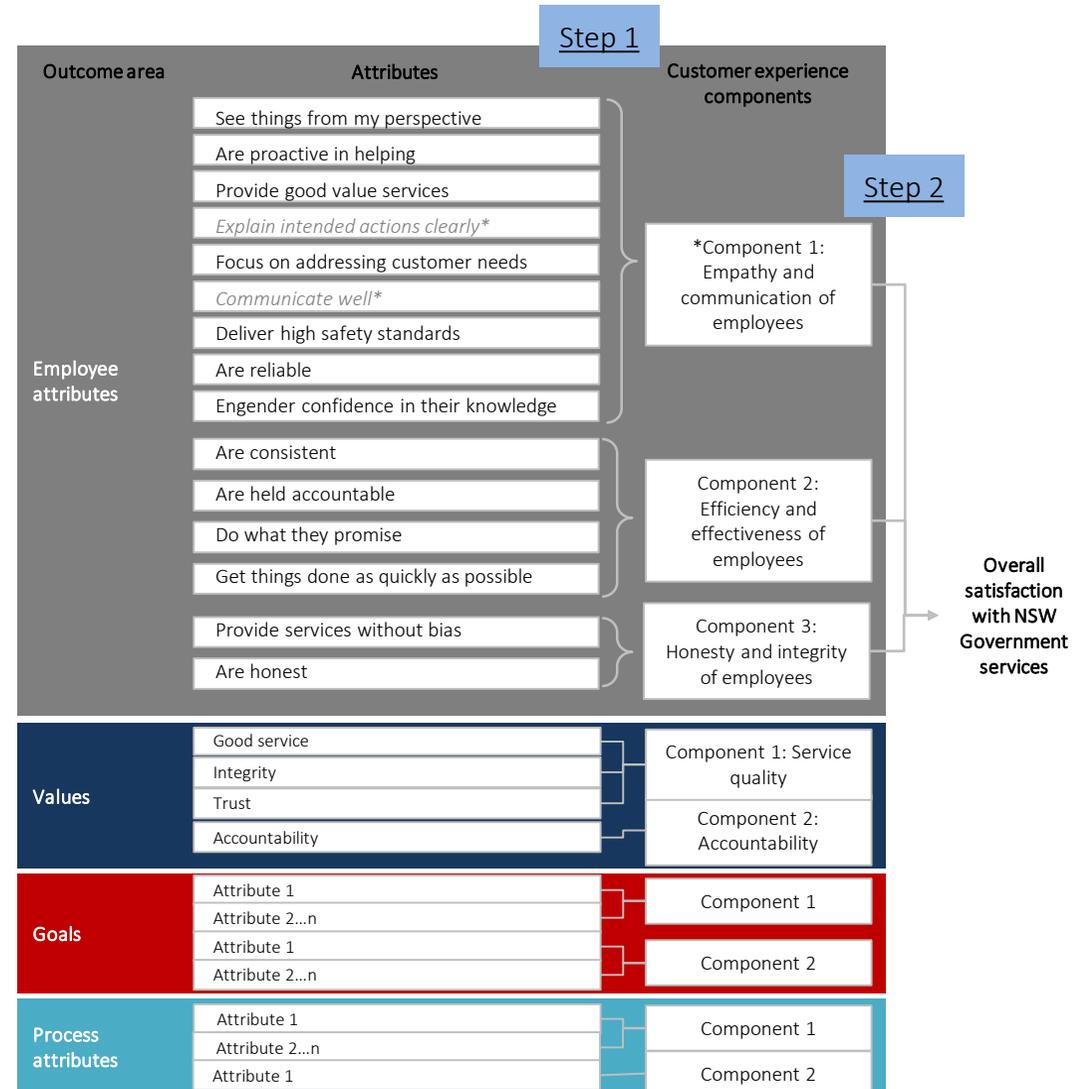


## Objective: Satisfaction driver analysis

**Driver analysis** is used to understand the relative importance of key attributes within each of the outcome areas (employees, processes, goals and values) in determining overall satisfaction with NSW Government services and in turn, with the customer satisfaction index.

To identify the drivers of satisfaction, a 2 step methodology was followed:

- **Step 1: To identify unique components that impact the customer experience:**
  - Attributes within each of the outcome areas were analysed separately using a statistical methodology called Principle Components Analysis (PCA)
  - Via PCA analysis, attributes were grouped into key customer experience components based on attributes that respondents rate similarly.
- **Step 2: To identify which of the customer experience components have the greatest impact on overall satisfaction with NSW Government services:**
  - Regression analysis was undertaken using each of the customer experience components with overall satisfaction as the dependent variable
  - Statistically robust components were identified to be significant drivers of satisfaction based on their statistical significance in predicting overall satisfaction with NSW Government services
  - Relative importance of the components/drivers in determining overall satisfaction was assessed based on the size of the regression coefficient.



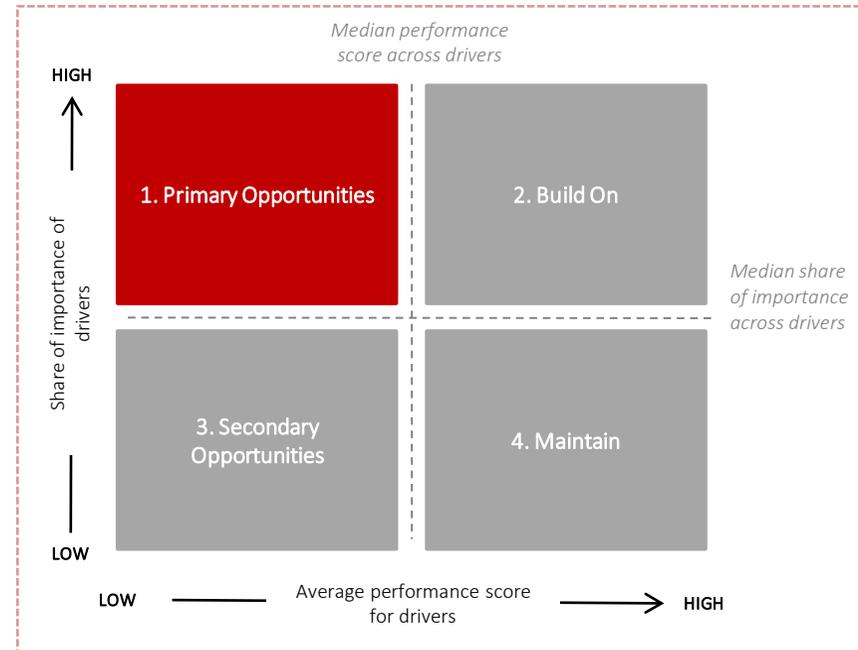
\*Note: Under the Employee outcome area, the customer experience component that was named 'communication' in 2016 has been renamed to 'empathy and communication' in 2017. There are two attributes that remain consistent in this grouping between 2016 and 2017 ('explain intended actions clearly' and 'communicate well'), and there are 7 attributes that newly aligned to this group for 2017.

## Identification of primary opportunities

Primary opportunities have been identified as those attributes that are relatively more important in explaining customer satisfaction and that have relatively lower performance (based on average scores provided by customers)

Analysis of the relative importance and performance of drivers for NSW Government Overall and by service lines identifies key areas to action to ultimately improve overall satisfaction:

1. Prioritise improvement initiatives for drivers in the **'Primary Opportunity'** quadrant as they are more important to customers and currently have a lower than average satisfaction score.
2. Continue to deliver above average performance across the drivers in the **'Build On'** quadrant which are of greater importance to customers and currently have higher than average performance score.
3. As a lower priority, seek to improve on drivers in the **'Secondary Opportunities'** quadrant which are of lower importance to customers but for which current perceived performance is low.
4. Seek to maintain performance of service attributes in the **'Maintain'** quadrant which are less important to customers and for which perceived performance is higher than average.





Customer Service Commissioner  
NEW SOUTH WALES

