Customer Service Commissioner
NEW SOUTH WALES

Quarterly Pulse Check Survey Q4 2017
Summary Report

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Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q4 2017

1. Executive Summary

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1.1 Executive Summary

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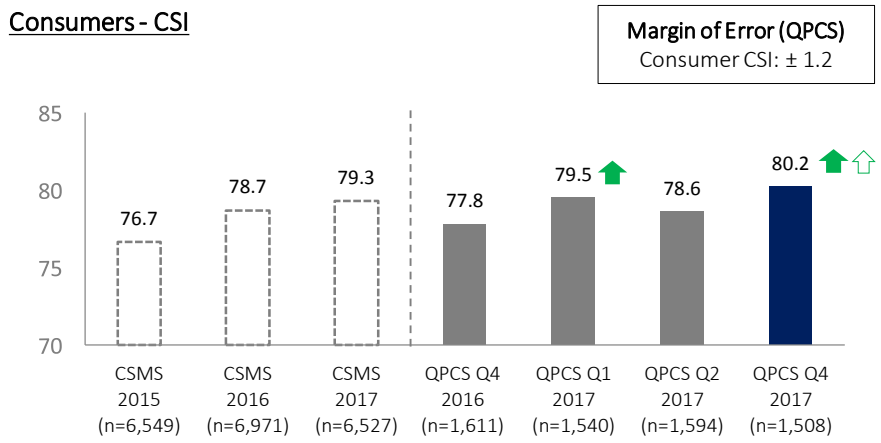
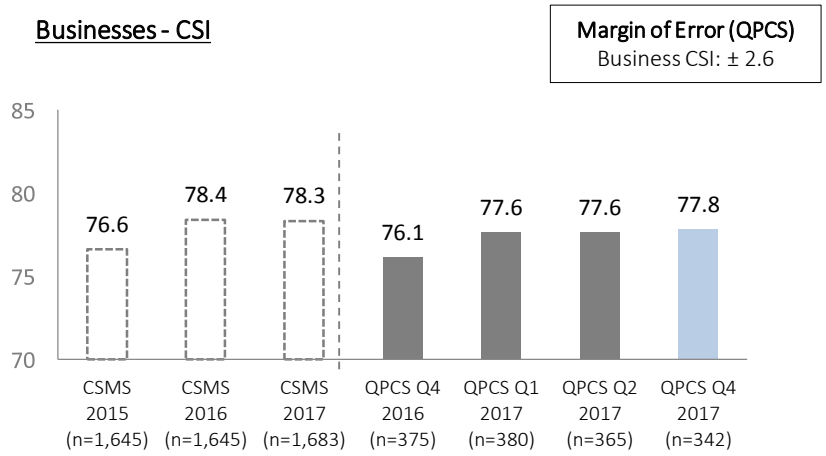
- The **Customer Satisfaction Index (CSI) has increased among consumers and businesses** in Q4 2017 – up statistically significantly[1] among consumers by 1.6 points from Q2 2017 to 80.2. Among businesses, the CSI has increased marginally, up 0.2 points to 77.8.
  - Compared to this time last year (Q4 2016) the Customer Satisfaction Index (CSI) has increased statistically significantly by 2.4 points among consumers and 1.7 points among businesses (not statistically significant).
- **The gap between satisfaction and expectations of NSW Government services is narrowing**.
  - Over the last 12 months (since Q4 2016 QPCS), there has been a general lift in satisfaction, which has increased by 0.3 points to 7.7/10 among consumers (statistically significant), and 7.5/10 among businesses (not statistically significant) since Q4 2016.
  - Over the same period, expectations have remained stable for both consumers (7.8/10) and businesses (7.6/10).
  - This has resulted in the gap between satisfaction and expectation narrowing among both consumers and businesses: from 0.4 to 0.1 since Q4 2016. This trend is consistent with findings on the satisfaction-expectation gap from the three annual CSMS surveys (2015, 2016 and 2017), suggesting a developing trend that NSW Government services are edging closer to meeting customer expectations.
- Expectations of service is a measure of quality[2]. Therefore as the satisfaction and expectation gap narrows, we should look to increase both customer satisfaction and expectation of services in order to make continual gains in performance.





[1]Statistical significance is the likelihood that a relationship between two or more variables is caused by something other than random chance.

[2]http://www.theacsi.org/about-acsi/the-science-of-customer-satisfaction - the American Customer Satisfaction Index

Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

1.1 Executive Summary (continued)

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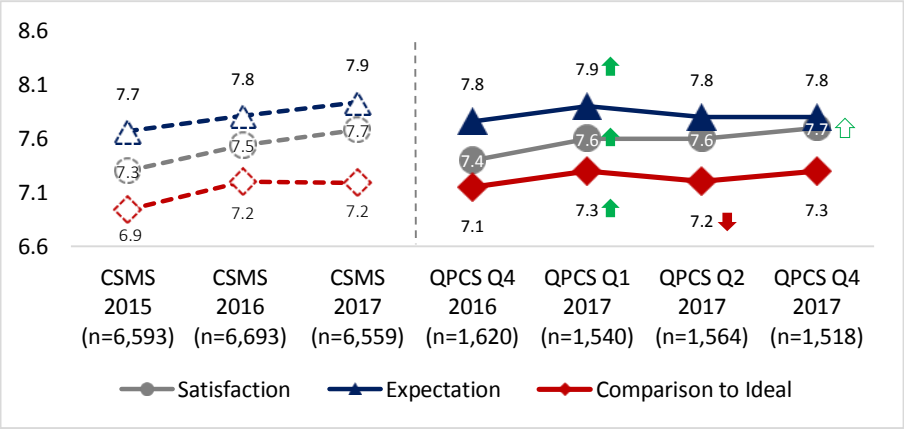
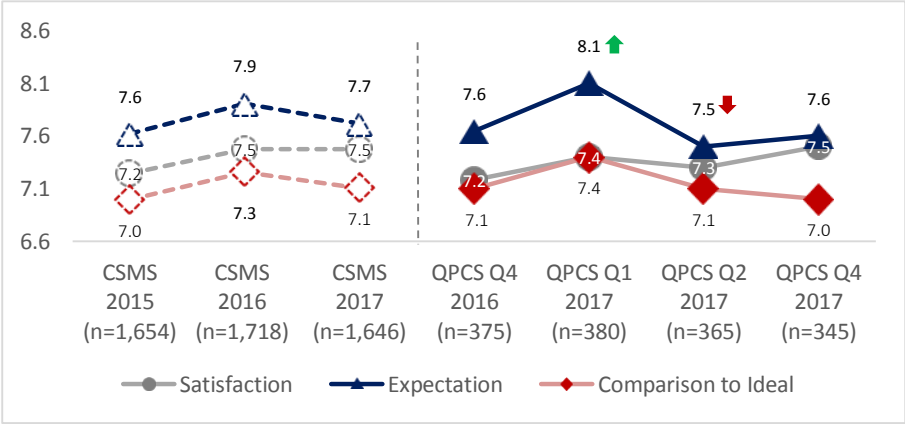
- **Three opportunities to increase expectations** of NSW Government services have been identified based on both the quantitative data from QPCS and annual CSMS, and qualitative research [2].
    1. **Exceed service delivery satisfaction and expectation** for customers whose needs are currently being met (48% of consumers and 44% businesses), by delivering over and above expectations. 'Softer' employee attributes relating to *employee empathy* has been identified as the most important new driver in 2017 and qualitative research supports this as the key element required to exceed customer expectations.
    2. **Meet expectations for customers where there is a gap** by delivering on the Key Primary Opportunity Areas of *efficiency and effectiveness of employees* and *access to information*. Satisfaction is below expectations for 25% of businesses and consumers.
    3. **Increase low expectations of NSW Government services** by focusing on services identified as having lower than average expectations. 21% of businesses and 18% of consumers have low expectations of NSW Government services (expectations rated 1-6/10).

Consumers – Baseline Measures



Businesses – Baseline Measures



Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

[2] See Appendix for further information on focus group methodology

1.1 Executive Summary (continued)

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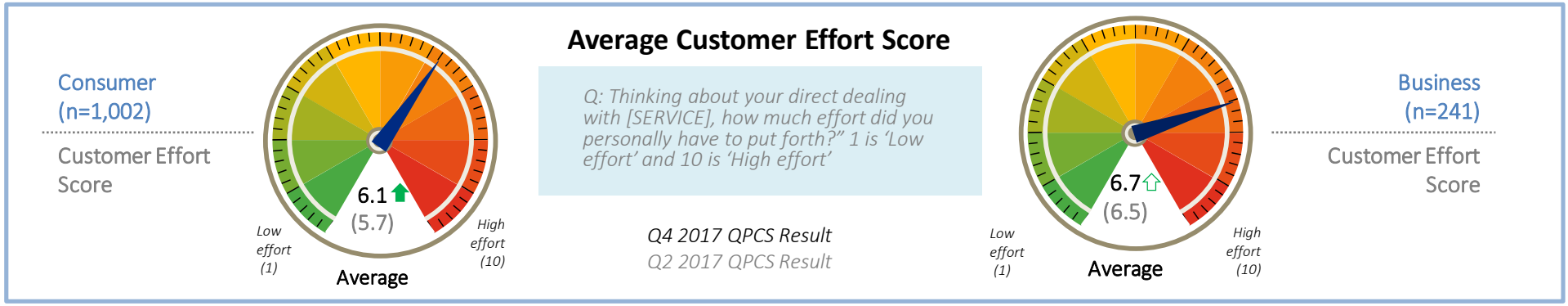
- **There is opportunity to refine businesses' interactions with NSW Government services** as customer effort increases for businesses.
  - The Customer Effort Score (CES) has increased for both consumers and businesses in Q4 2017 indicating that customers felt more effort was required when interacting with NSW Government services in the last six months compared to Q2 2017. The increase is statistically significant among consumers, up by 0.4 points to 6.1/10, and slightly up by 0.2 to 6.7/10 among businesses.
  - The trend over the past 12 months for businesses indicates that the level of effort required by businesses engaging with NSW Government services is increasing - the CES has increased statistically significantly over the past 12 months, by 0.4/10.

- ***Efficiency and effectiveness of employees*** **and** ***access to information and online services*** **remain primary opportunity areas** for increasing satisfaction in 2017. There have been slight uplifts in performance on these drivers among both consumers and businesses in Q4 2017 (not statistically significant).
  - Among consumers in Q4 2017 there has been a statistically significant improvement in *simplicity and efficiency of processes* (up 0.4 to 7.7), and a significant decline in *Privacy* (down 0.2 to 7.9/10).
  - Among businesses in Q4 2017, there have been statistically significant improvements in the *honesty and integrity of employees* (up 0.3 to 7.9). Performance on *accountability* and *employee autonomy* has recovered slightly after significant declines in Q2 2017, both increasing to 7.4/10.



Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

2. Customer Satisfaction Measures

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2.1 Key Findings - Customer Satisfaction Index (CSI) and Baseline Measures

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Comparison of 2017 Q4 QPCS Results to 2017 Q2 QPCS Results

- Customer Satisfaction Index (CSI) has increased statistically significantly among consumers, up 1.6 points from Q2 2017 to 80.2. The CSI has increased marginally (up 0.2 points) among businesses to 77.8.
    - Among both businesses and consumers all three outcome measures have remained relatively stable since Q2 2017.
    - However, the gap between satisfaction and expectation has narrowed slightly this quarter (down from 0.2 to 0.1 for both consumers and businesses), resulting in an increase in the CSI.

Baseline measures (avg. score out of 10):

	Consumer				Business			
	Q4 2016	Q1 2017	Q2 2017	**Q4 2017**	Q4 2016	Q1 2017	Q2 2017	**Q4 2017**
Satisfaction	7.4	7.6 ↑	7.6 ⇧	**7.7**	7.2	7.4	7.3	**7.5**
Expectation	7.8	7.9 ↑	7.8	**7.8**	7.6	8.1 ↑	7.5 ↓	**7.6**
Ideal service	7.1	7.3 ↑	7.2 ↓	**7.3**	7.1	7.4	7.1	**7.0**

Comparison of 2017 Q4 QPCS Results to 2016 Q4 QPCS Results

- For the first time QPCS results can be compared in the context of time of year, and seasonal trends can be observed in the data. Compared with this time last year (Q4 2016):
    - The Customer Satisfaction Index (CSI) has increased statistically significantly by 2.4 points among consumers and 1.7 points among businesses (not statistically significant).
    - Satisfaction has increased by 0.3 points to 7.7/10 among consumers (statistically significant), and 7.5/10 among businesses (not statistically significant).
    - Expectations have remained stable for both consumers (7.8/10) and businesses (7.6/10).
    - Comparison to ideal service has increased slightly (not statistically significant) for consumers to 7.3/10 (up 0.2 points) and decreased slightly for businesses to 7.0/10 (down 0.1 points - not statistically significant) .
    - Increases in satisfaction combined with stable expectations have resulted in the gap between satisfaction and expectation narrowing among both consumers and businesses over the past year. Both the consumer and business expectation gaps have narrowed from 0.4 to 0.1 since Q4 2016.
- These QPCS results, along with consistent findings on the satisfaction-expectation gap from the three annual CSMS surveys (2015, 2016 and 2017), suggest a developing trend that NSW Government services are edging closer to meeting customer expectations.

↑↓ *Statistically significant movement from previous quarter at 95% confidence level*

⇧⇩ *Statistically significant movement from same quarter previous year at 95% confidence level*

2.2 Key Findings – Customer Effort

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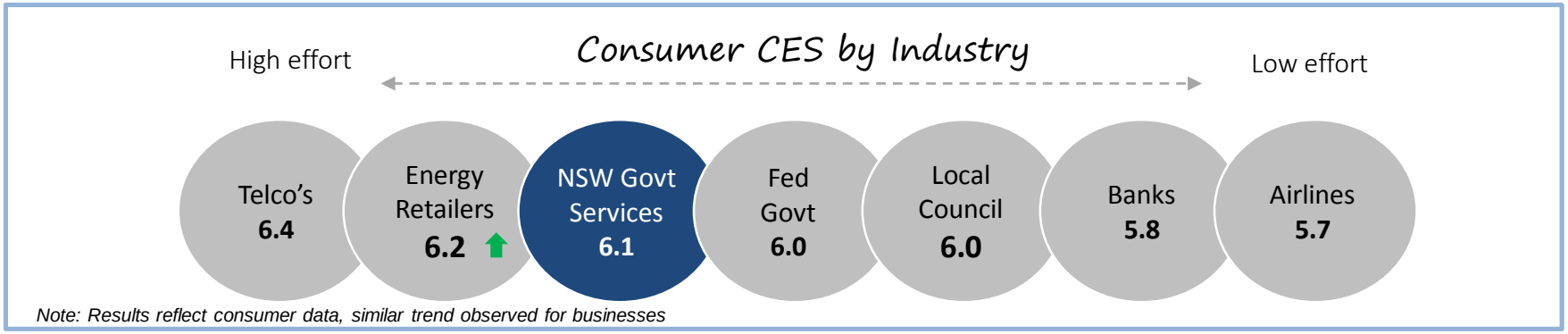
- The Customer Effort Score (CES) has increased for both consumers and businesses in Q4 2017 indicating that customers felt more effort was required when interacting with NSW Government services in the last six months compared to Q2 2017.
  - The increase is statistically significant among consumers, up by 0.4 points to 6.1/10, and slightly up among businesses, up by 0.2 to 6.7/10.
  - When considering annual trends, the CES remains stable among consumers year-on-year with only a slight increase of 0.1 since the same period last year (Q4 2016). For businesses on the other hand, the CES has increased statistically significantly over the past 12 months, by 0.4/10. This suggests a trend of increasing customer effort in business' interactions with NSW Government services.
- When benchmarked against other industries, NSW Government services (at a Whole of Government level) compares favourably to telephone service providers and energy retailers in terms of effort required in interactions, among both consumers and businesses.
  - Among businesses, NSW Government services require more effort than the Federal Government and local councils and airlines, and are on par with banks for effort required in interactions;
  - Among consumers, NSW Government service interactions require more effort than the Federal Government, local councils, banks and airlines;
  - Airlines require the lowest customer effort for consumers and businesses.



Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

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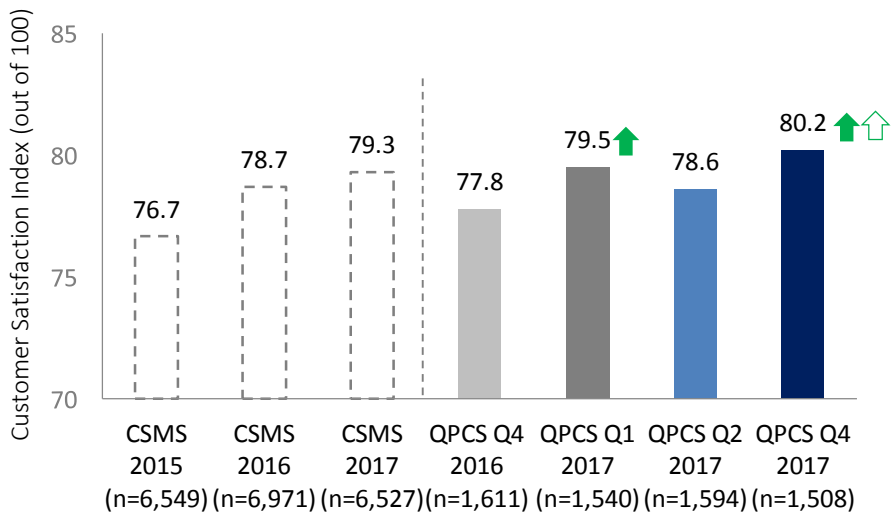
2.3 Customer Satisfaction Index

Consumer – Customer Satisfaction Index

The Customer Satisfaction Index (CSI) as measured by the QPCS in Q4 2017 is 80.2 for consumers.

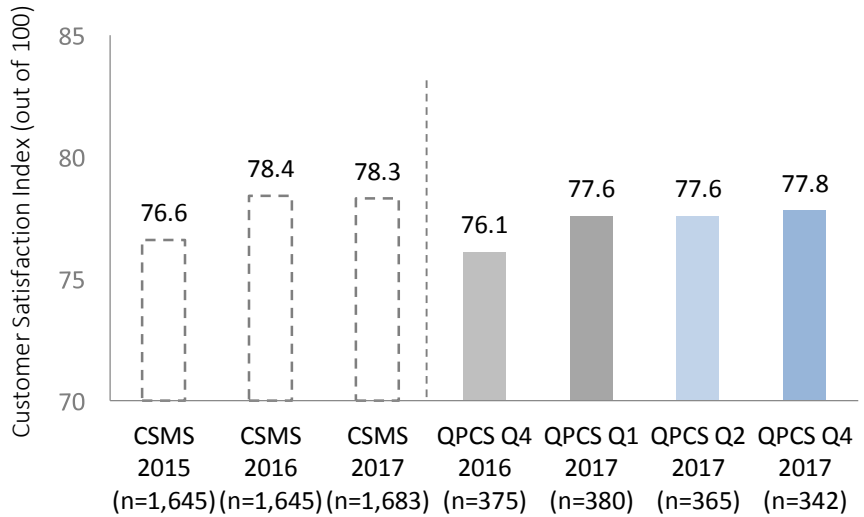
Margin of Error (QPCS)
Consumer CSI: ± 1.2



Business – Customer Satisfaction Index

The Customer Satisfaction Index (CSI) as measured by the QPCS in Q4 2017 is 77.8 for businesses.

Margin of Error (QPCS)
Business CSI: ± 2.6



The Customer Satisfaction Index (CSI) has increased statistically significantly among consumers, up 1.6 points from Q2 2017 to 80.2. This is also a statistically significant increase on the same time last year (Q4 2016) – an increase of 2.4 points over that period.

Among businesses, the CSI has increased marginally, up 0.2 points to 77.8 since Q2 2017. There is an increase of 1.7 since Q4 2016. The increases in business CSI are not statistically significant.

Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

2.4 Top Line Performance – Consumer Satisfaction, Expectation and Comparison to Ideal

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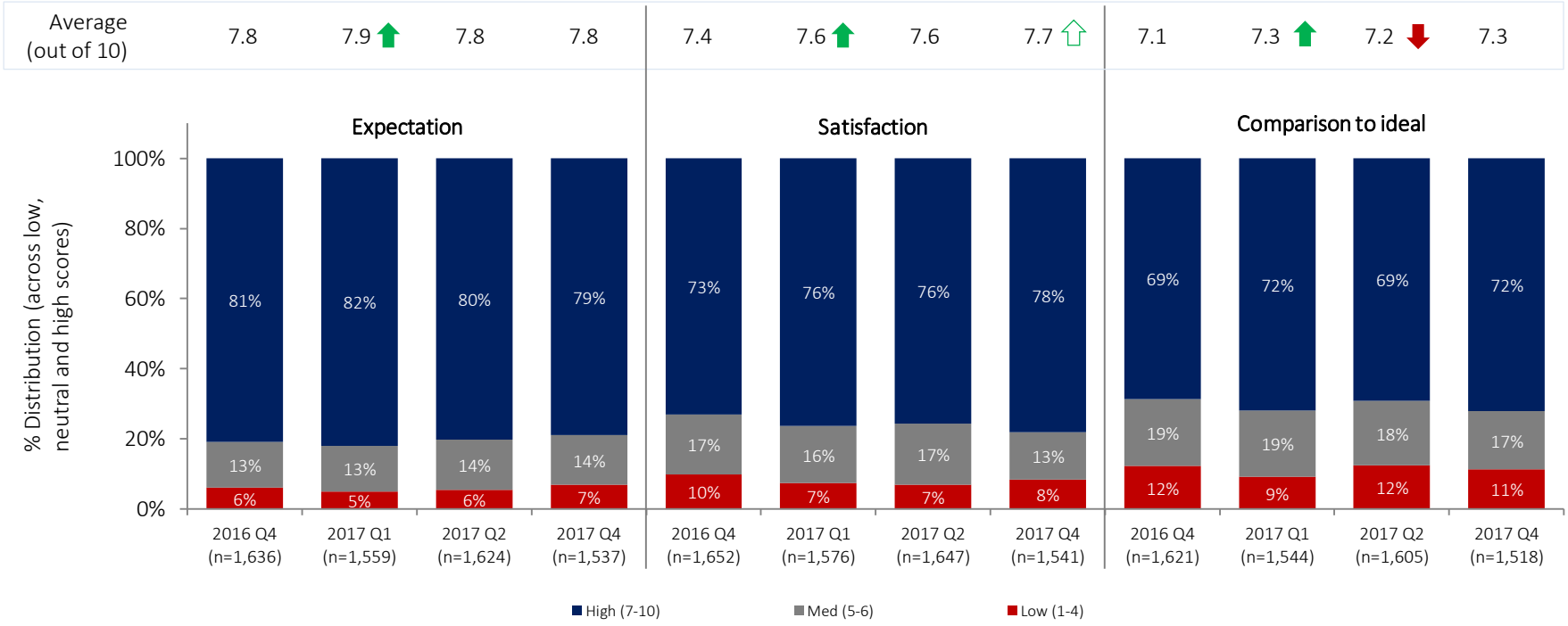
Consumer – Outcome Measures

Average satisfaction as measured by the QPCS in Q4 2017 for consumers is 7.7/10, which is slightly below average expectation of 7.8/10. When compared to an 'ideal' service, consumers rated NSW Government services on average 7.3/10.



Among consumers all three outcome measures have remained relatively stable since Q2 2017.

Compared to this time last year (Q4 2016) satisfaction has increased statistically significantly by 0.3 points to 7.7/10, while expectations have remained stable at 7.8/10 over the same period. This has resulted in a narrowing gap between consumer expectations and satisfaction – from a gap of 0.4 in Q4 2016, to 0.1 in Q4 2017.

Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

Note: Figures in the graph are subject to rounding as some may not add up to 100%

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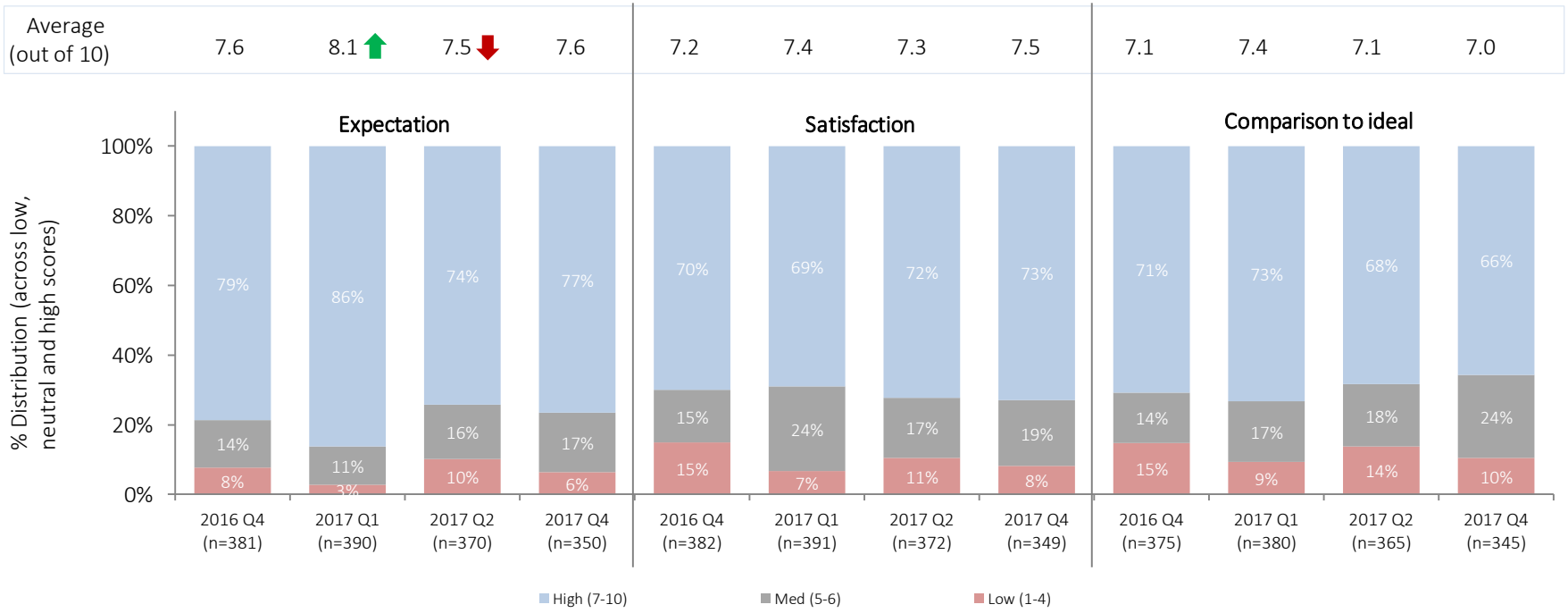
2.4 Top Line Performance – Business Satisfaction, Expectation and Comparison to Ideal

Business – Outcome Measures

Average satisfaction as measured by the QPCS in Q4 2017 for businesses is 7.5/10, which is slightly below average expectation of 7.6/10. When compared to an 'ideal' service, businesses rated NSW Government services on average 7/10.



Among businesses all three outcome measures have remained relatively stable since Q2 2017, with no statistically significant changes.

Compared to this time last year (Q4 2016) satisfaction has increased by 0.3 points 7.5/10 among businesses. While this is not a statistically significant increase, as expectations remain stable year-on-year, the gap between business expectations and satisfaction is narrowing – from 0.4 in Q4 2016 to 0.1 in Q4 2017.

Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

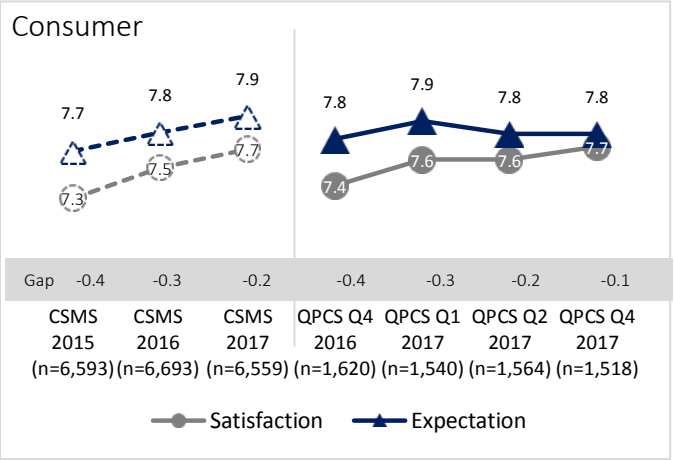
Note: Figures in the graph are subject to rounding as some may not add up to 100%

2.5 Satisfaction – Expectation Gap

Annual CSMS and QPCS trends in satisfaction and expectations suggest a positive shift where satisfaction is moving closer in line with expectations, indicating service delivery is closer to expected. This is true for both consumers and businesses.

Qualitative research, via focus groups[1], sought to understand some of the drivers behind consumer and business expectations and provide context for these trends. Three aspects were investigated:

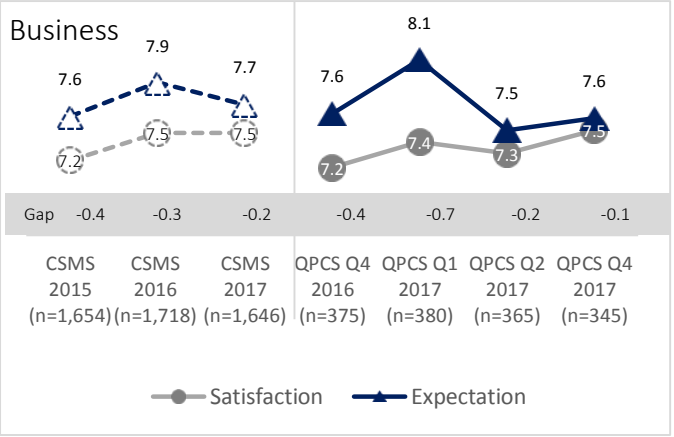
1. High vs low customer expectations
2. Exceeded vs unmet expectations
3. Future expectations



Context

- Customer expectations indicate *'the customer's anticipation of the quality of a company's products or services. Expectations represent both prior consumption experience, which includes some non-experiential information like advertising and word-of-mouth, and a forecast of the company's ability to deliver quality in the future.'*[2]

- The CSMS and QPCS methodology for calculating the Customer Satisfaction Index (CSI) calibrates the gap to expectation such that if the GAP is ≥ 0, it is assumed that the service has fully met or exceeded customer expectations and a maximum value of 10 is assigned. This suggests that, *all things being equal* (i.e. if satisfaction and gap to ideal remain stable), as the gap between satisfaction and expectations narrows, it may become difficult to increase the CSI as the maximum calibrated value of 10 is applied.



Expectation is a measure of quality. Therefore as the satisfaction and expectation gap narrows, we should look to increase both customer satisfaction and expectation of services

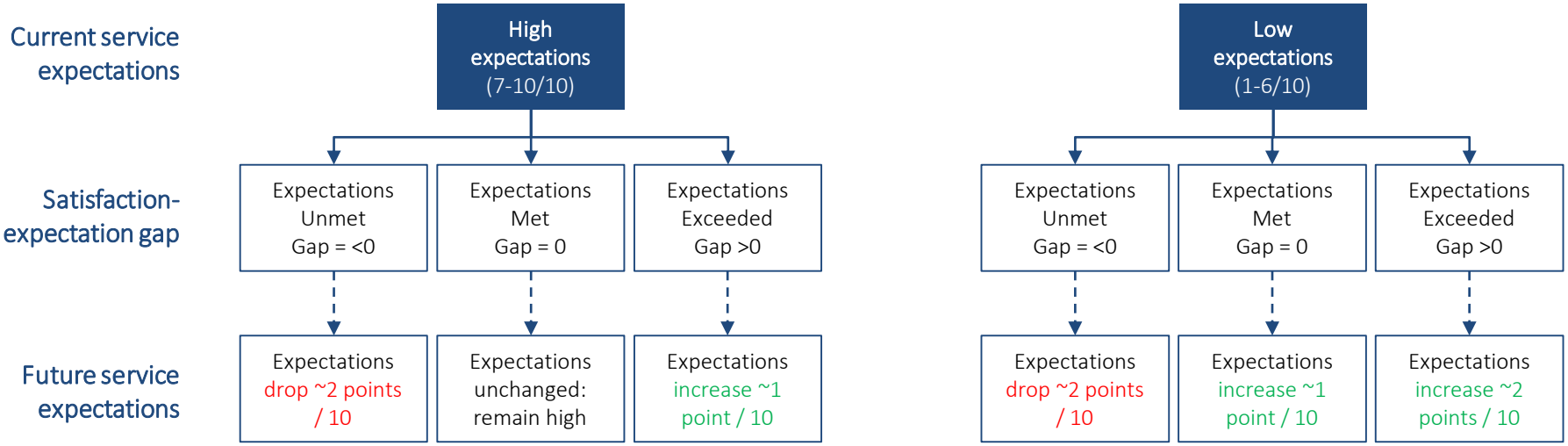
[1]See Appendix for further information on focus group methodology and key insights

[2] http://www.theacsi.org/about-acsi/the-science-of-customer-satisfaction - the American Customer Satisfaction Index

2.5 Satisfaction – Expectation Gap (continued)

Focus group[1] participants were asked to rate their current expectations of the NSW Government services that they had interacted with in the last six months, as well as their satisfaction with that service. They were also asked to rate their future expectation of that service based on their experiences.

The below analysis of the focus groups provide additional context to the quantitative data from the QPCS and Annual CSMS. The trend shows that when expectations are unmet, future expectations of service decline. If expectations are however exceeded, future expectations increase. This is true whether current service expectations are high or low.



Focus groups suggest that reasons for high expectations include:

- Positive past experiences
- Media coverage
- Word of mouth
- May vary by service, with generally higher expectations of emergency services

> *"Some services are more crucial, people have higher expectation because a life could be lost if they aren't done well"*
>
> – consumer focus group participant

Focus groups suggest that reasons for low expectations include:

- Negative past experiences
- Negative perceptions of systems, staffing levels, pressure on staff, lack of resources
- Media Coverage
- Word of mouth

> *"What they're doing with the roads is catch up, it should have been done thirty years ago"*
>
> – consumer focus group attendee

[1]See Appendix for further information on focus group methodology and key insights.

2.5 Satisfaction – Expectation Gap (continued)

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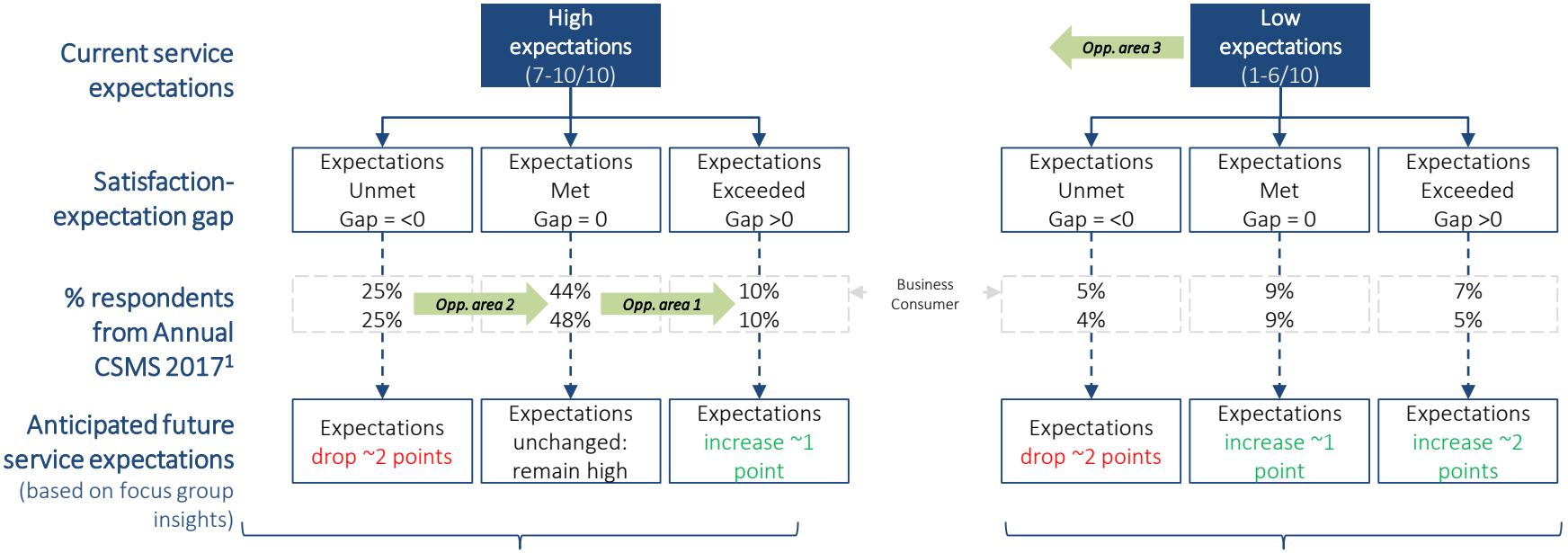
With the gap between satisfaction and expectation narrowing, looking forward we should identify opportunities to increase satisfaction and/or expectation scores. Overlay of Annual CSMS 2017 data shows that there are three areas of opportunities:

1. 'Delight' customers who currently have high expectations by exceeding them: almost a half of respondents have high expectations of NSW Government services, and these are being met: 44% of business and 48% of consumers have expectations (above 7/10) and a satisfaction-expectations gap of 0. This suggests that future satisfaction and expectation will remain steady, unless service delivery expectations for these customers are exceeded.
2. Deliver on Key Primary Opportunity Areas (KPOAs) as identified in CSMS 2017 – these are 'dissatisfier' areas which are important for customers and performance is relatively low. 25% of consumers and businesses have high expectations which are not being met.
3. Increase expectations for the 21% of businesses and 18% of consumers who have low expectations of NSW Government services



79% of businesses and
82% of consumers
have high expectations of NSW Government services
(from CSMS 2017)

21% of businesses and
18% of consumers
have low expectations of NSW Government services
(from CSMS 2017)

[1]Base: CSMS 2017 Business = 1644; Consumers = 6539; indicative for illustrative purposes only – not based on weighted data

2.5 Satisfaction – Expectation Gap Analysis (continued)

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Opportunity Area 1

'Delight' customers who currently have high expectations which are being met: seek to increase both satisfaction and therefore also expectation

- Focus on the *empathy and communication of employees* – this is the most important driver of satisfaction as identified in CSMS 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 2017 CSMS survey and is a Whole of Government recommendation.

- Recognise that businesses are clients and not customers: qualitative research from 2017 CSMS 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"*[2]

Opportunity Area 2

Deliver on Key Primary Opportunity Areas (KPOAs): twenty-five per cent of consumers and businesses have high expectations which are not being met

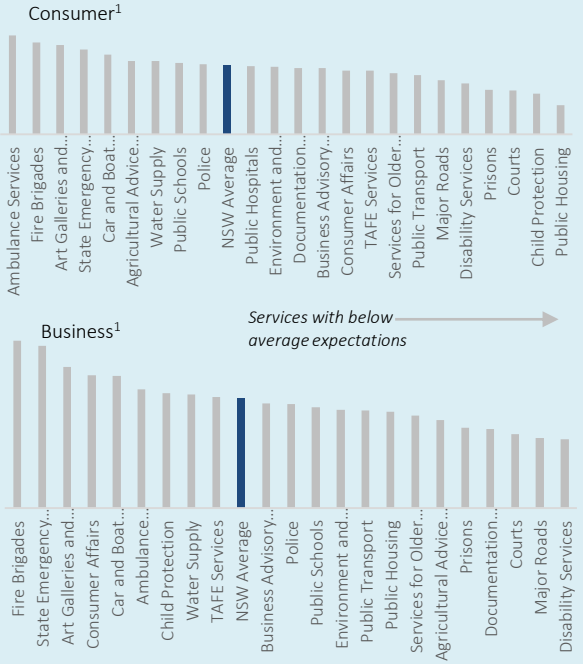
- Focus on *efficiency and effectiveness of employees* and *access to information* – both identified as KPOAs in CSMS 2017: performance is relatively low in these areas. Qualitative research further suggests that the following are reasons for customer expectations not being met (both consumer and business):
  - Services - the need for better, faster, and more frequent services
  - Time - waiting times, and ranges from transport delays to queues and response times from a cross section of services
  - Staff - the need for more staff to increase responsiveness. This stems from the perception that staff may be 'overworked', and is linked with the 'waiting time' theme above
  - Information – need for more information; consistency from different sources to increase user confidence and trust; and accessibility of information
  - Communication - there has been an emerging theme regarding the need for better communication between service staff and respondents who are seeking help

Opportunity Area 3

Increase expectations for the 21% of businesses and 18% of consumers who have low expectations of NSW Government services.

- Focus on improving customer expectations for services that have below average expectations. Expectations reflect customers' views of the quality of service delivered by the NSW Government. Qualitative research indicates that reasons for low expectations include:
  - *Perceptions* of a lack of/poor systems and staff to support service delivery. These are shaped by media coverage or word of mouth
  - Past experiences of services being negative

Expectations of NSW Government Services



[1]Base: CSMS 2017 Business = 1644; Consumers = 6539
[2]Source: Annual 2017 CSMS focus group (business)

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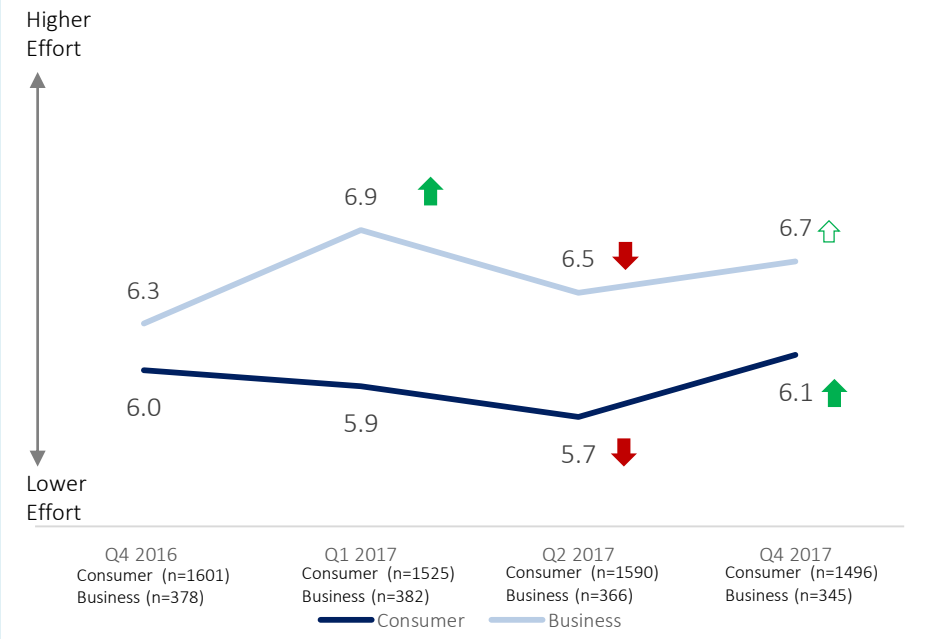
2.6 Customer Effort Score and Impacts on Customer Satisfaction

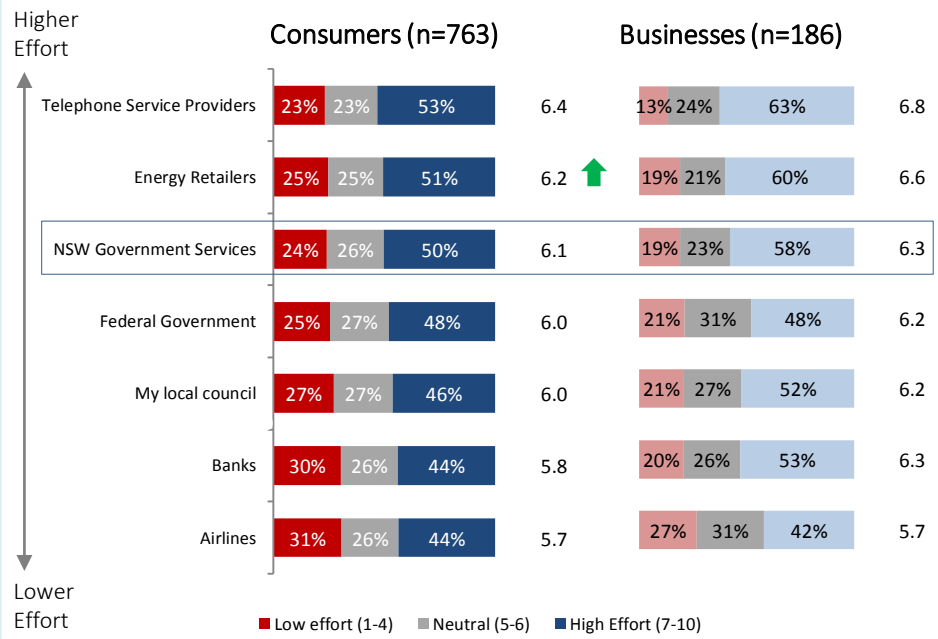
Customer Effort Score – Service Interaction

Service interaction Customer Effort Score.



Customer Effort Score– WHoG Benchmark

Customer Effort Score benchmarked at a Whole of Government level against other industries.



The Customer Effort Score (CES) has increased statistically significantly among consumers, up by 0.4 points to 6.1/10, and increased slightly among businesses, up by 0.2 to 6.7/10 from Q2 2017. When considering annual trends, the CES remains stable among consumers year-on-year with a slight increase of 0.1 since the same period last year (Q4 2016). For businesses, the CES has increased by 0.4 over the past 12 months. When benchmarked against other industries, NSW Government services (at a Whole of Government level) compare favourably among both consumers and businesses to telephone service providers and energy retailers in terms of effort required in interactions.

Statistically significant movement from previous quarter at 95% confidence level

Statistically significant movement from same quarter previous year at 95% confidence level

Note: Figures in the graph are subject to rounding

3. Insights on Satisfaction Drivers

Section Contents

3.1 Key findings - Drivers of Satisfaction and Key Primary Opportunity Areas

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- ***Efficiency and effectiveness of employees*** and ***access to information and online services*** **remain primary opportunity areas** for increasing satisfaction in 2017.
- **A new driver category emerged in 2017** (as identified in the 2017 CSMS) encompassing 'softer' attributes such as ***empathy and communication of employees***. This category has replaced *employee communication* as a driver of satisfaction with NSW Government services. *Empathy and communication of employees* is a relative strength to build on in 2017.

- **Among consumers** in Q4 2017 there has been a statistically significant improvement in ***simplicity and efficiency of processes*** (up 0.4 to 7.7/10), and a significant decline in *Privacy* (down 0.2 to 7.9/10).
  - Performance on the new driver category *employees acted with empathy* (7.6/10) is aligned with performance on the 2016 driver *communications* (7.7/10), which combined make up the new driver category of *empathy and communication of employees*.
  - The highest performing drivers are *privacy* (7.9/10), *honesty and integrity of employees* (7.8/10), *communications* (7.7/10) and *transparency* (7.7/10).
  - The three lowest performing drivers are *employee autonomy* (7.3/10), *accountability* (7.4/10) and *access to information* (7.4/10). *Access to information* is a key primary opportunity area identified in the 2017 CSMS and improvements in this area are likely to have the greatest impact on overall satisfaction with NSW Government services.
  - Performance on the other primary opportunity area identified in 2017 CSMS – *efficiency and effectiveness of employees* – is 7.6/10 – further improvements in this area are also likely to have the greatest impact on satisfaction.
- **Among businesses** in Q4 2017, there have been statistically significant improvements in the ***honesty and integrity of employees*** (up 0.3 to 7.9/10). Performance on *accountability* and *employee autonomy* has recovered slightly after significant declines in Q2 2017, both increasing to 7.4/10.
  - Performance on the new driver category of *employees acted with empathy* (7.7/10) is aligned with performance on the 2016 driver *communications* (7.6/10), which combined make up the new driver category of *empathy and communication of employees*.
  - The highest performing drivers are *transparency* (8/10), *honesty and integrity of employees* (7.9/10), *efficiency and effectiveness of employees* (7.7/10) and *empathy of employees* (7.7/10).
  - The three lowest performing drivers are *simplicity and efficiency of processes*, *employee autonomy* and *accountability* (all 7.4/10).

3.2 Introduction to 2017 Key Primary Opportunity Areas (KPOAs)

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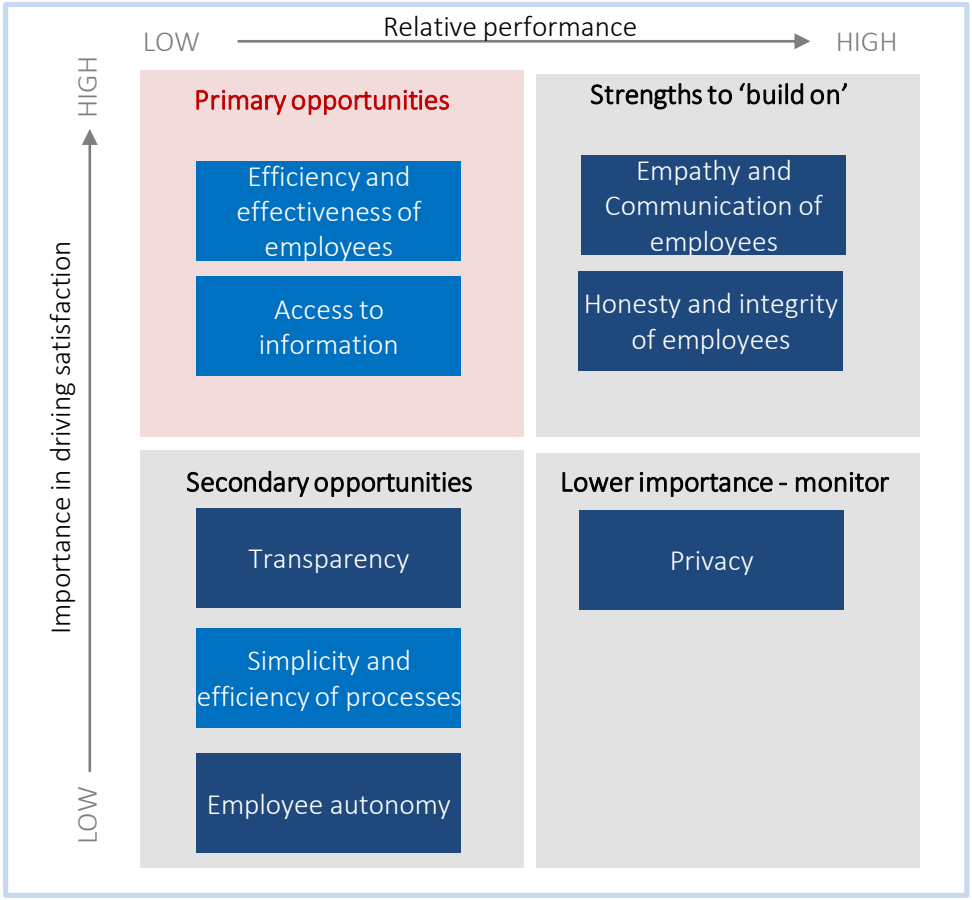
Recap:

Key Primary Opportunity Areas were identified based on 2017 Annual CSMS data. These were derived based on analysis of the importance of drivers in determining satisfaction, and their performance. Key Primary Opportunity Areas have been further tested in the QPCS.

Analysis to identify the Key Primary Opportunity Areas in 2017 reveals that:

- **Efficiency and effectiveness of employees** and **access to information and online services** remain primary opportunity areas for increasing satisfaction in 2017 as they are of high importance in driving customer satisfaction and their perceived performance is lower than other Whole of Government drivers.
- The attributes that define the driver 'efficiency and effectiveness of employees' have changed in 2017 – this is outlined on the following page.
- A new driver category has emerged in 2017 encompassing 'softer' attributes such as **empathy and communication of employees**. This category has replaced **employee communication** as a driver of satisfaction with NSW Government services. **Empathy and communication of employees** is a relative strength to build on in 2017, as it is important to customers and perceived performance is high. A new attribute has been added in Q4 QPCS to reflect this change.

Key Primary Opportunity Areas - 2017



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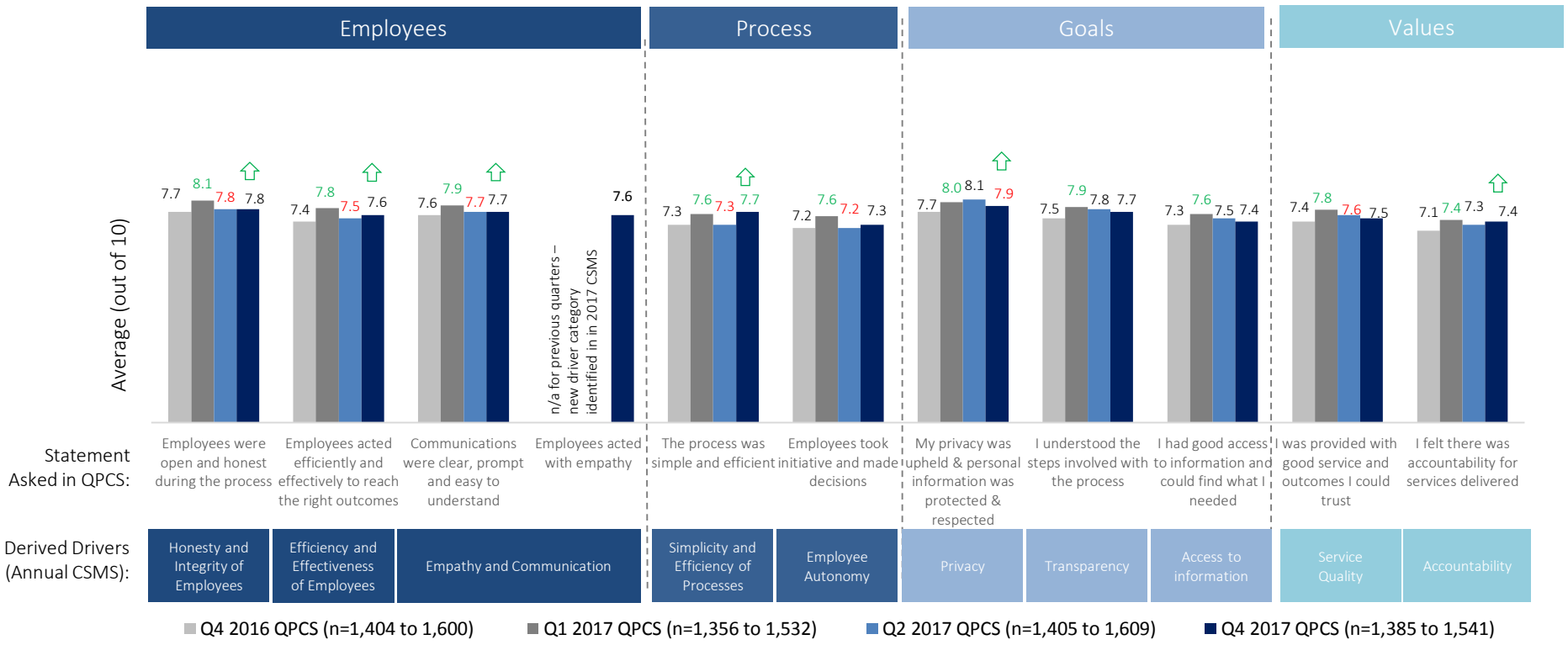
3.3 Performance of Satisfaction Drivers - Consumers

Drivers of Satisfaction



Among consumers in Q4 2017 there has been a statistically significant improvement in *simplicity and efficiency of processes* (up 0.4 to 7.7/10), and a significant decline in *Privacy* (down 0.2 to 7.9/10) since Q2 2017. Performance on the new driver category of *employees acted with empathy* (7.6/10) is aligned with performance on *communications* (7.7/10), which combined make up the new driver of *empathy and communication of employees*.

⇧⇩ *Statistically significant movement from same quarter previous year at 95% confidence level*

Data labels in green/red indicate statistically significant movement at 95% confidence level compared to previous quarters results

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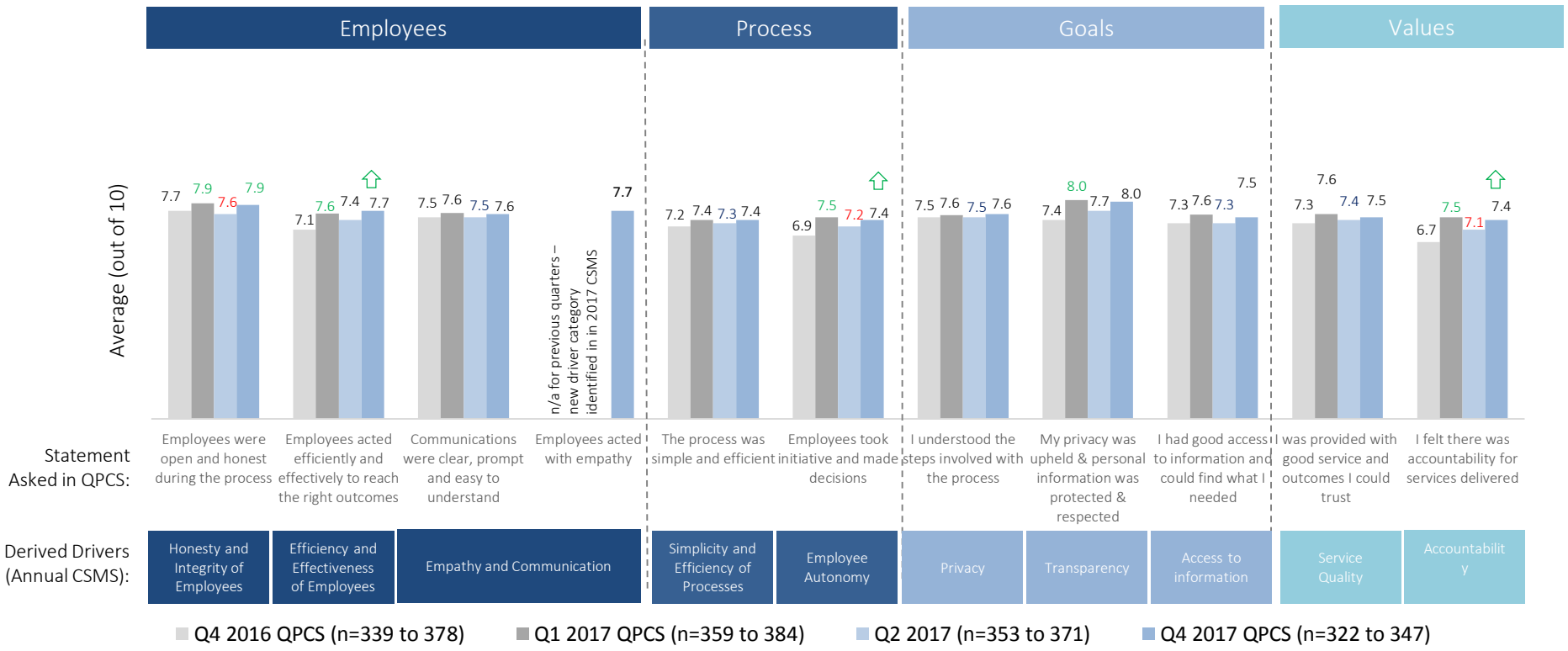
3.3 Performance of Satisfaction Drivers - Businesses

Drivers of Satisfaction



Among businesses in Q4 2017, there has been a statistically significant improvement in the driver *honesty and integrity of employees* (up 0.3 to 7.9/10). Performance on *accountability* and *employee autonomy* has recovered slightly after significant declines in Q2 2017, both increasing to 7.4/10.

Performance on the new attribute *employees acted with empathy* (7.7/10) is aligned with performance on *communications* (7.6/10), which combined make up the new driver of *empathy and communication of employees*.

⇧⇩ *Statistically significant movement from same quarter previous year at 95% confidence level*

Data labels in green/red indicate statistically significant movement at 95% confidence level compared to previous quarters results

4. Insights on Key Primary Opportunity Areas

Section Contents

4.1 Key Primary Opportunity Areas (KPOAs) in 2017

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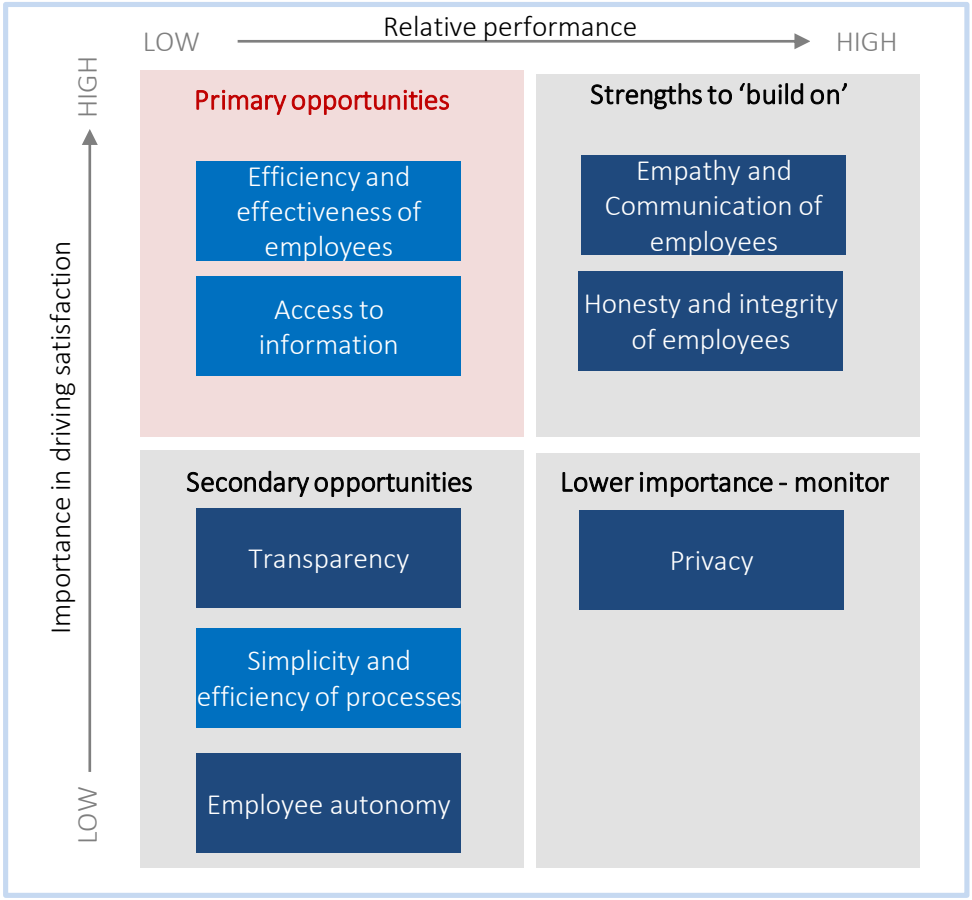
The QPCS provides a deep dive into the specific drivers of satisfaction and associated attributes as identified in the Annual CSMS. These are key areas which will have the greatest impact on overall customer satisfaction of NSW Government services as they are of high importance yet are perceived to have lower performance.

The deep dive KPOAs for the Q4 2017 QPCS are:

- Efficiency and effectiveness of employees
- Access to information

Key Primary Opportunity Areas - 2017



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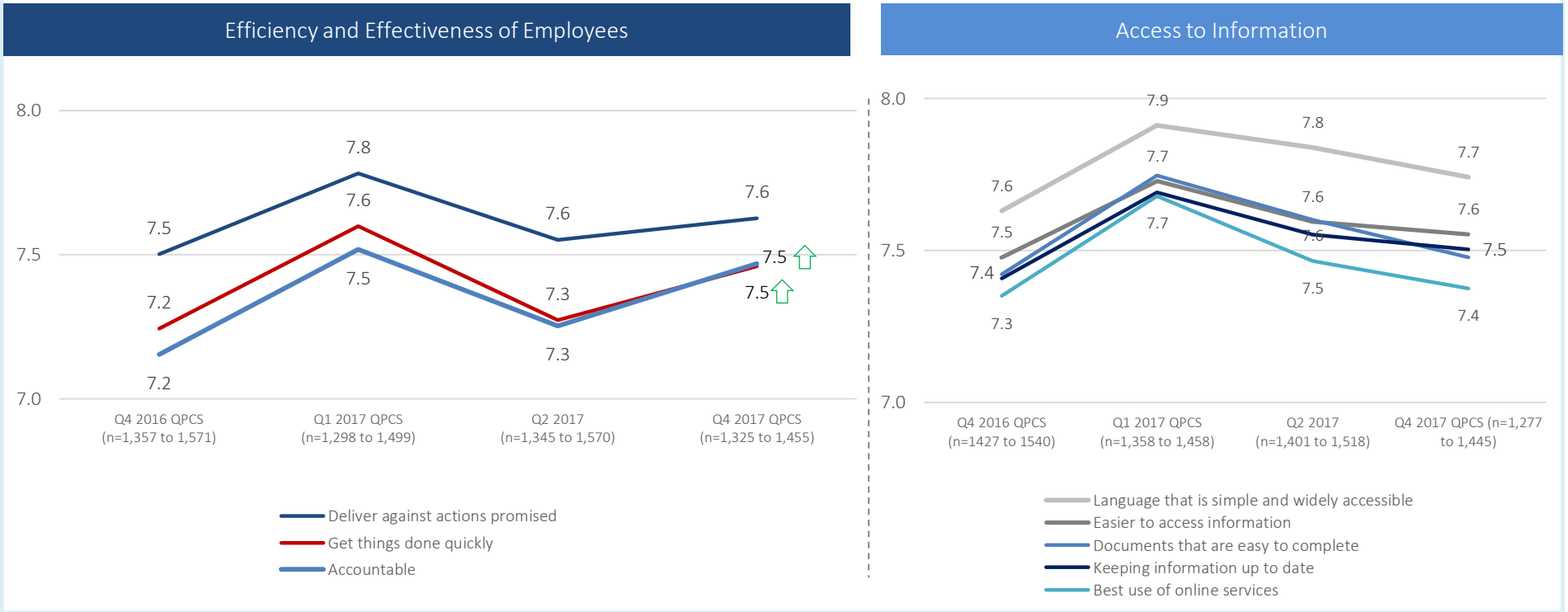
4.2 Performance of Key Primary Opportunity Areas - Consumers



Consumer ratings for attributes relating to *employee efficiency and effectiveness* have improved in Q4 2017, with *getting things done quickly* and *accountability* improving statistically significantly on this time last year (Q4 2016). *Delivering against promises* has remained stable year-on-year. All attributes relating to *access to information* have declined slightly in Q4 2017, with performance in Q4 2017 comparable to Q2 2017.

**Variations in figures may appear due to rounding*

⇧⇩ *Statistically significant movement from same quarter previous year at 95% confidence level*

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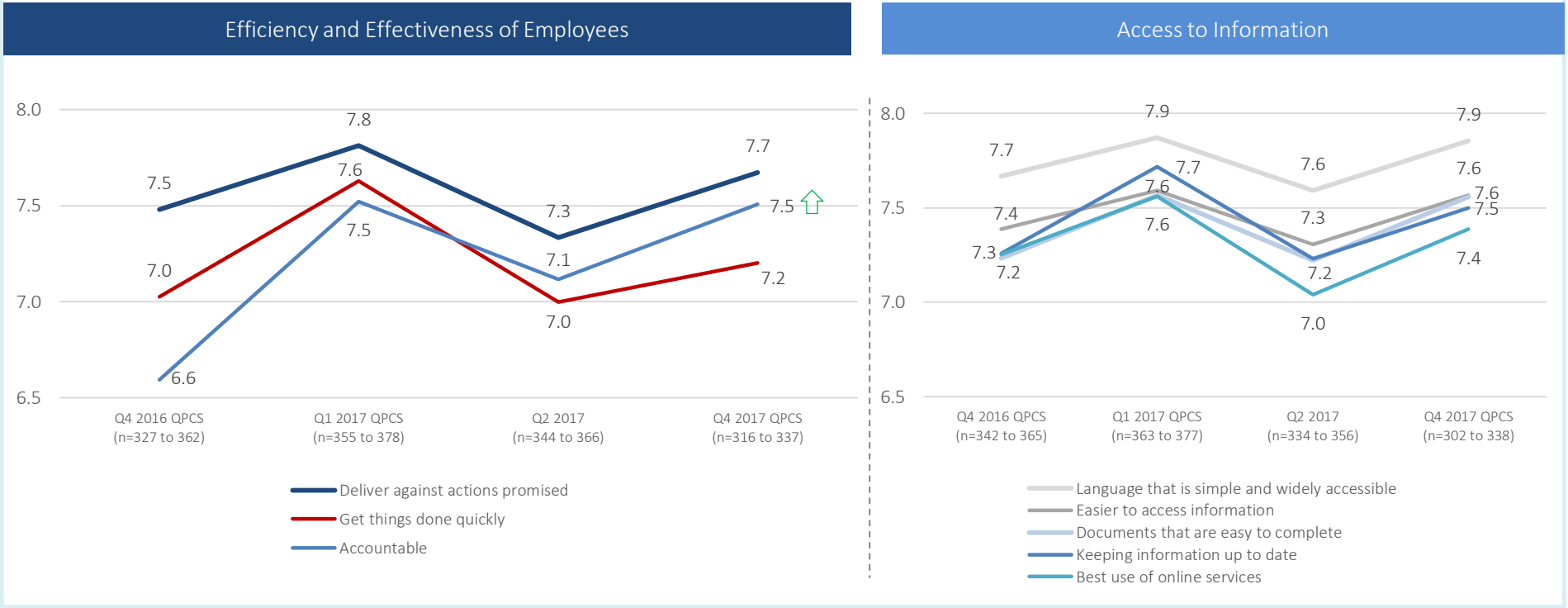
4.2 Performance of Key Primary Opportunity Areas - Business



Among businesses, all attributes relating to the KPOAs *employee efficiency and effectiveness* and *access to information* have recovered in Q4 2017, following declines seen in Q2 2017. Year-on-year, all attributes are slightly ahead of the benchmark set in Q4 2016, with the exception of *accountability*, which has improved by 0.9/10 in the last 12 months –a statistically significant increase.

**Variations in figures may appear due to rounding*

Statistically significant movement at 95% confidence level compared to Q4 2016 results

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4.3 Drivers of Satisfaction with Employee Efficiency and Effectiveness- Consumer

Reasons for high satisfaction with employee efficiency and effectiveness (7-10/10)

- Staff being helpful, knowledgeable and efficient, as well as staff proactively wanting to help
- Clear two-way communication between staff and customers
- Achieving a result

"Staff know what they are talking about and are very knowledgeable and respectful at all times.

They were efficient, kept me informed and were pleasant and polite.

They did what was required in the shortest possible time.

The necessary steps were clearly explained to me and the process eventually achieved a result.

Listening to our concerns/issues that arose at the time. They were very thorough and provided reassurance to alleviate our worries"

Reasons for low satisfaction with employee efficiency and effectiveness (1-6/10)

- Lengthy wait times
- Multiple attempts to achieve an outcome without resolution
- Lack of employee empathy when issues or complications arise

"Difficult to deal with and took long to respond and deal with issue.

Simply put they did not get it right the first time or the second time.

Employees are often unable to provide correct information.

Been on waiting list for a decade.

Emailed an application form, then found out three months later from a phone call I made to them that it wasn't registered. They told me to fill in another form and send it in, which I did and the same thing happened again. The staff do not understand or/and don't care."

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4.3 Drivers of Satisfaction with Employee Efficiency and Effectiveness- Business

Reasons for high satisfaction with employee efficiency and effectiveness (7-10/10)

- Helpful, knowledgeable, capable staff
- Staff able to respond quickly
- Staff solving problems, going the extra mile

"They were helpful and solved the problem as I expected.

The matter was handled in an efficient manner and resolved with a fair result.

The employees are dedicated and knowledgeable, they know their job.

Staff were prompt in providing information and if they didn't have an answer they put in effort to find out on my behalf.

Each task was completed with a minimum amount of time, straight away no dithering, they knew what had to be done, who was to do the various tasks and where things were. All knew their jobs."

Reasons for low satisfaction with employee efficiency and effectiveness (1-6/10)

- Wait times
- Responses did not meet expectations with greater effort required and queries left unanswered
- Inconsistent information

"It took significant effort on my part to reach the outcome. Even then, it took a long time to receive a response.

I was not satisfied, I felt that my questions were not answered, there was no empathy and I felt staff were ill informed and did not really care about my enquiry.

Reasonable feedback regarding the progress of my complaint, however, not solved.

Waste of my time. Letter said one thing staff did something completely different. No resolution."

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4.4 Drivers of Satisfaction with Access to Information- Consumer

Reasons for high satisfaction with access to information (7-10/10)

- Easy and quick access to information online
- Proactive communication throughout processes

"It was easy to navigate and I didn't have to waste much of my time searching for the right information.

Website is well set out with lots of information and subscribing to email mailing lists was good too.

Information is correct and easy to find.

The technician contacted me after the work was done to let me know its updates.

Informed verbally and provided written reference material at all stages."

Reasons for low satisfaction with access to information (1-6/10)

- Excessive and overwhelming amount of information
- Website was not user friendly
- Information was too general

"Plenty of information on their site but some of it is quite hard to find.

I have found they have an excess of information to such an extent that it is so overwhelming you are totally confused.

It is hard to get information on government websites, the logic of finding information is impossible to understand, you often go round in circles.

A few leaflets with generalisations."

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4.4 Drivers of Satisfaction with Access to Information - Business

Reasons for high satisfaction with access to information (7-10/10)

- Easy access to information or assistance
- Able to find what was needed quickly
- Informative, up to date websites
- Knowledgeable and helpful staff

"Web interaction was easy to navigate.

The online information is very comprehensive and easy to follow.

The knowledge of the person on the phone.

Website and online service was informative and up to date and easy to use.

Given all the relevant information, the first time.

Person at the front door assisting with people's enquiries."

Reasons for low satisfaction with access to information (1-6/10)

- Lack of information or staff not knowing the correct information
- Difficult to navigate and access online information
- Inaccurate or inconsistent information across channels

"Website can be tricky to find specific enquiry.

Not confident using current online search and use facility.

I felt they didn't know. I felt my views were "alleged" views until they had proven things for themselves rather than listening to me as a shortcut to the solution.

What's a timetable if it can't be counted on.

I didn't have access to online information and felt that face to face information differed greatly depending on who I spoke to."

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4.5 Suggested Areas for Improvement - Consumers

Ideas to improve employee efficiency and effectiveness

- More staff to reduce wait times
- Better trained staff
- Clear communication of wait times to customers
- Empowered employees

"More staff and resources to reduce waiting times.

More telephone operators during peak call times.

They should be provided with the right training to make them more knowledgeable.

A regular update as to my current waiting time.

The employees should either know all the information or have a direct line to get questions answered. They should also have the capacity to feed issues up the system."

Q: Continuing to think about the statement "I had good access to information and could find what I needed"... how do you believe this could be improved?

Ideas to improve access to information

- More online services
- Better design of websites
- Easier and clearer access to the information online
- Communication with and access to the right employees

"Less paper and information provided through online sources.

More information on the website, and potentially cutting down the amount of text so that it can be summarised.

Make sure the website information is complete and updated regularly.

Scope of online availability of services could be expanded.

Need more direct contact with the employee who is dealing with my case."

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4.5 Suggested Areas for Improvement - Business

Ideas to improve employee efficiency and effectiveness

- More staff
- Staff who are informed and who are empowered to make decisions
- Communication with empathy

"More staff should be employed.

Better communication. Staff should be able to make a decision.

Ensure all staff undergo some kind of "people interaction" course or how to be friendly to customers.

Ensure staff are well informed and on top of what is causing delays or problems on the network.

Be more willing to take ownership of a problem, learn how to express empathy."

Q: Continuing to think about the statement "I had good access to information and could find what I needed..."how do you believe this could be improved?

Ideas to improve for access to information

- More online resources and online information
- Update information regularly to keep it current
- Simple processes

"Constant updates - the information seems to be ever changing and the businesses' aren't informed.

Provide more information on the website without having to contact someone.

There needs to be more services that can be conducted online, that don't require human touch.

Make sure the process is streamlined and simple to complete."

5. Channel Usage and Preference

Section Contents

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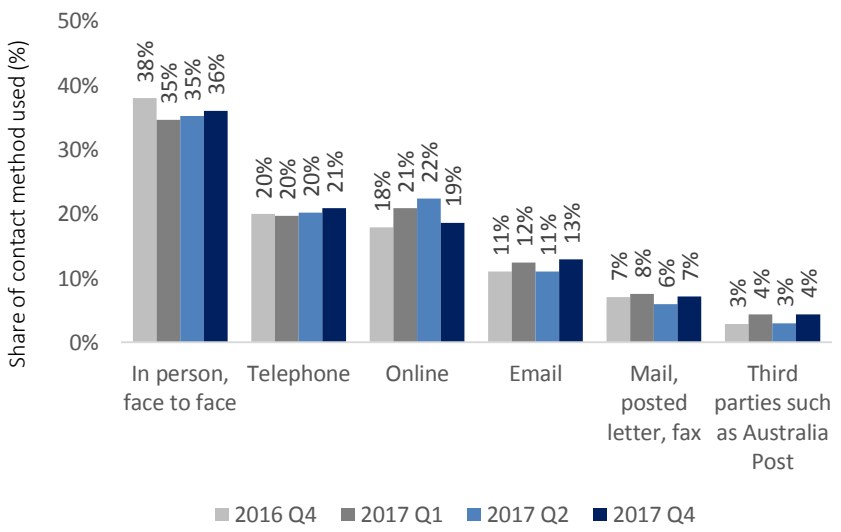
5.1 Channel Usage

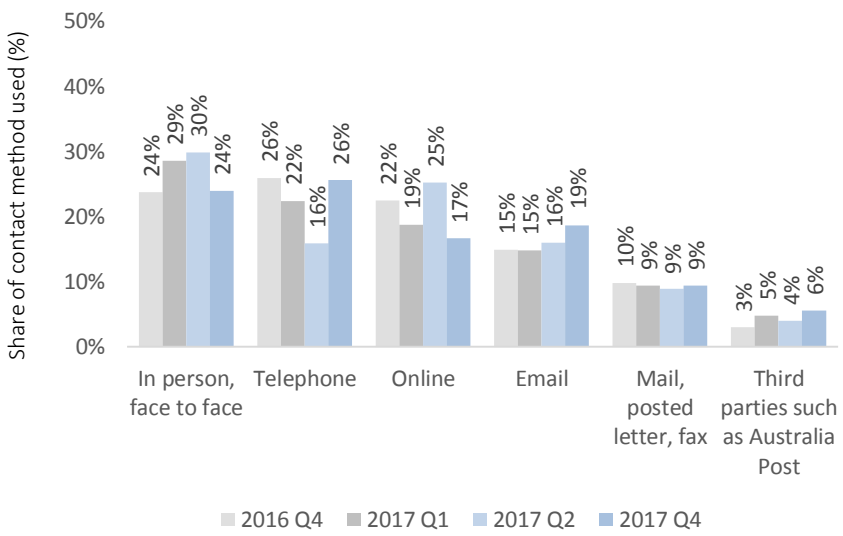
Contact Methods Used*

Consumer



Consumer n=1,563

Business



Business n=352

For consumers, there has been little change year-on-year in channel usage with results for 2017 Q4 being on par with 2016 Q4. Face to face remains the most used channel among this group. There is greater variation in channel use among businesses each quarter however the year-on-year trends are relatively stable. Face to face competes with telephone for most used channel among this group.

Note: Contact methods used is a multi response question; Figures in the graph are subject to rounding.

**Channel usage has been rebased on total number of responses for comparison to channel preference.*

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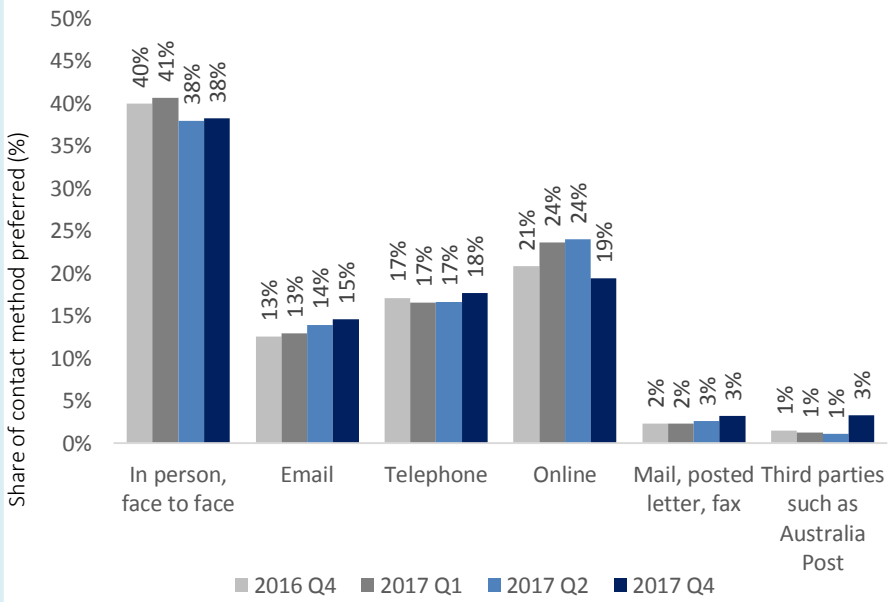
5.2 Channel Preference

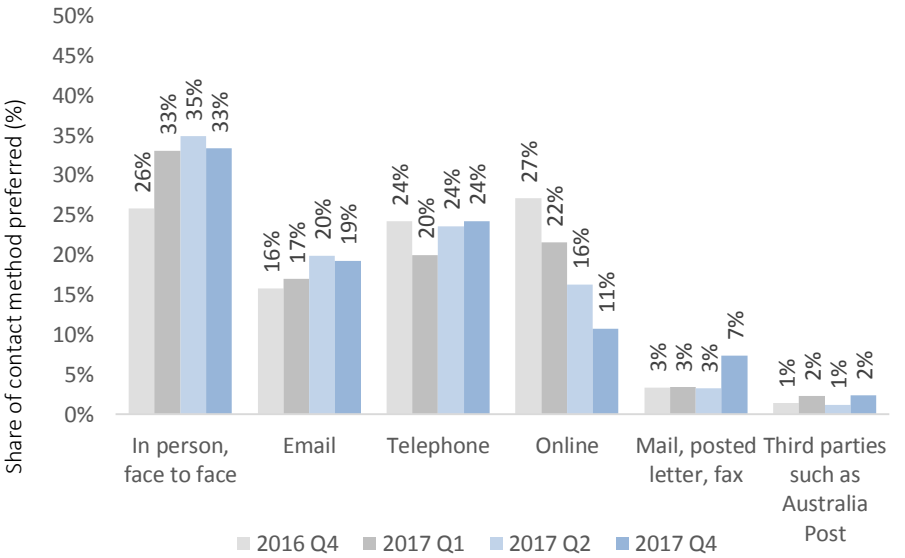
Contact Methods Preference*

Consumer



Consumer n=1,563

Business



Business n=352

There is a clear preference for in person interactions when consumers deal with NSW Government services and this has sustained over time. Businesses also prefer in person contact methods and preference for online has decreased further over the past 12 months.

**Note: Contact methods preferred is a single response question; Figures in the graph are subject to rounding*

Appendix

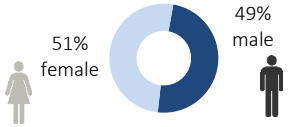
Section Contents

Appendix A – Demographic Profile of Respondents

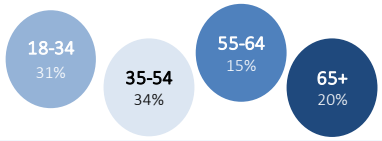
Consumer Respondent Profile

Consumers (n=1,002)

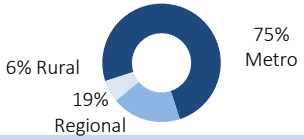
Gender:



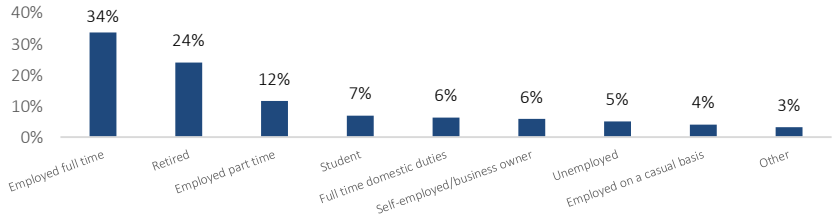
Age:



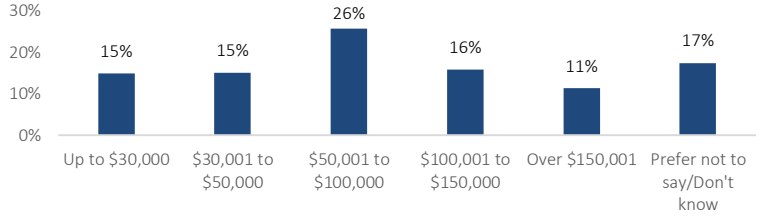
Region:



Employment Status:



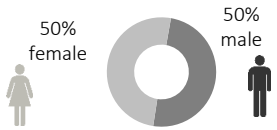
Annual Income:



Business Respondent Profile

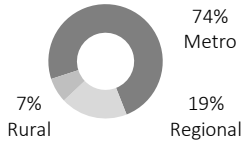
Business (n=241)

Gender:

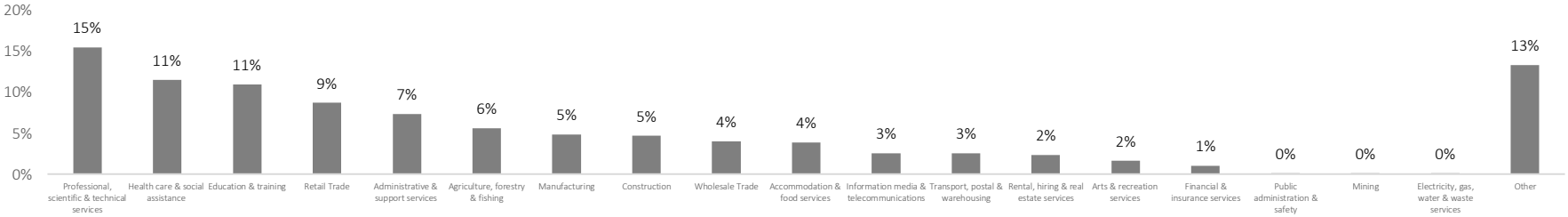


Business size:

Region:



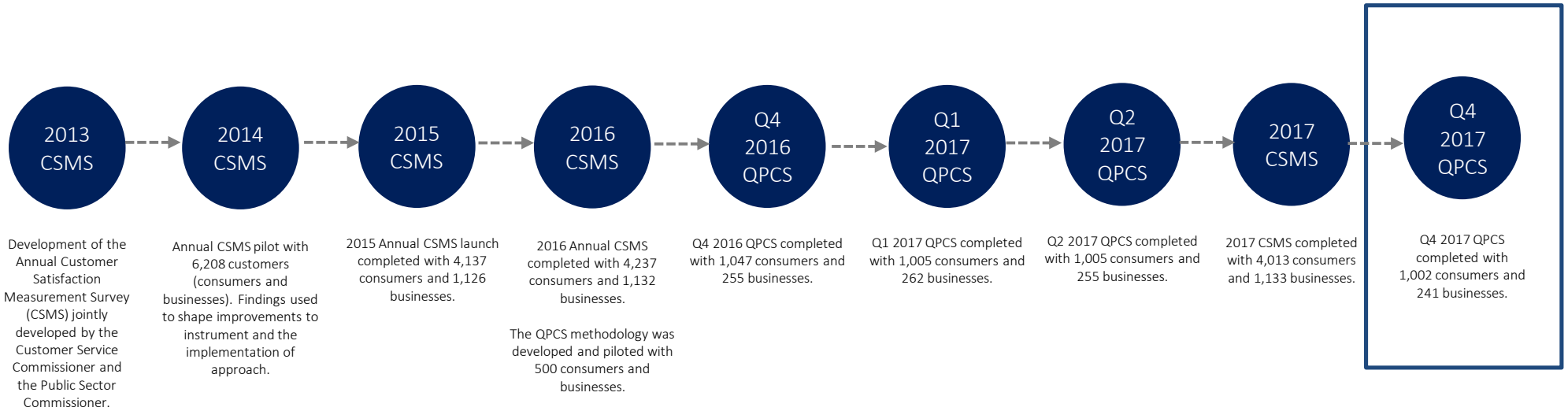
Industry:



Appendix B - Background

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

The Quarterly Pulse Check Survey was developed in 2016 as part of the broader customer satisfaction program of work, piloted in Q4 2016 and continued into 2017. In conjunction with the annual Customer Satisfaction Measurement Survey (CSMS), outputs are used to measure progress against the Premier's Priority 12 – 'improve customer satisfaction with key Government services every year, this term of government'.



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

Appendix B – Background - Objectives of the QPCS across Key Outputs

Project Objectives:

Frequency

Provide a more frequent understanding on how New South Wales Government services are performing overall, interpreted in the context of the Premier's Priority 12

+

Driver Deep Dive

Capture breadth: understand respondents' perceptions across the drivers of satisfaction identified in the Annual CSMS

Capture depth: deep dive into specific Key Primary Opportunity Areas identified in the Annual CSMS

Research Outputs:

Customer Satisfaction Index & Baseline Measures

Lead indicator for Premier's Priority 12 - respondents' perceptions of NSW Government services overall, captured by the Customer Satisfaction Index and its composite measures (overall satisfaction, expectation, ideal service)

Fixed section

+

Deep Dive into Driver Performance

Breadth: more frequent understanding of the 8 drivers of satisfaction.

Depth: deeper understanding of Key Primary Opportunity Areas captured in the Annual CSMS (empathy and communication of employees, access to information and simplicity and efficiency of processes)

Fixed + rotating variable section

Appendix B – Background - Research Scope and Approach

- The QPCS Methodology is aligned to the Annual Customer Satisfaction Measurement Survey (CSMS) approach:
  - Captures feedback across 23 different NSW Government services (described in the customers language).
  - Feedback received from customers about each of the individual services is aggregated to provide a view of the performance of NSW Government services overall.
  - Each respondent provides feedback regarding 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).
- The survey was completed from 26th October 2017 to 3rd November 2017 and results are therefore reflective of experiences with services over the six months prior, from May to October 2017.
- The Q4 2017 QPCS was completed with:
  - N = 1,002 consumers, and
  - N = 241 businesses.
- As each respondent provides feedback regarding 1 or 2 services, the Q4 2017 QPCS number of responses:
  - N = 1,563 for consumers, and
  - N = 352 for businesses.
- All scores reported in this document are out of 10, with the exception of the Customer Satisfaction Index which is out of 100.

In scope services

Industry
- Agriculture Advice and Funding Services
- Business Advisory Services
- 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

Health
- Public Hospitals
- Ambulance Services

Education
- Public Schools

Finance, Services & Innovation
- Consumer Affairs (Fair Trading)

Planning & Environment
- Environment and Wildlife Protection
- Art Galleries and Museums

Multiple clusters
- Documentation Services (including certificates for births deaths and marriages; trade licenses and certificates; and drivers licenses)
- Water Supply

Appendix B – Background - Linkage Between the Annual CSMS and QPCS

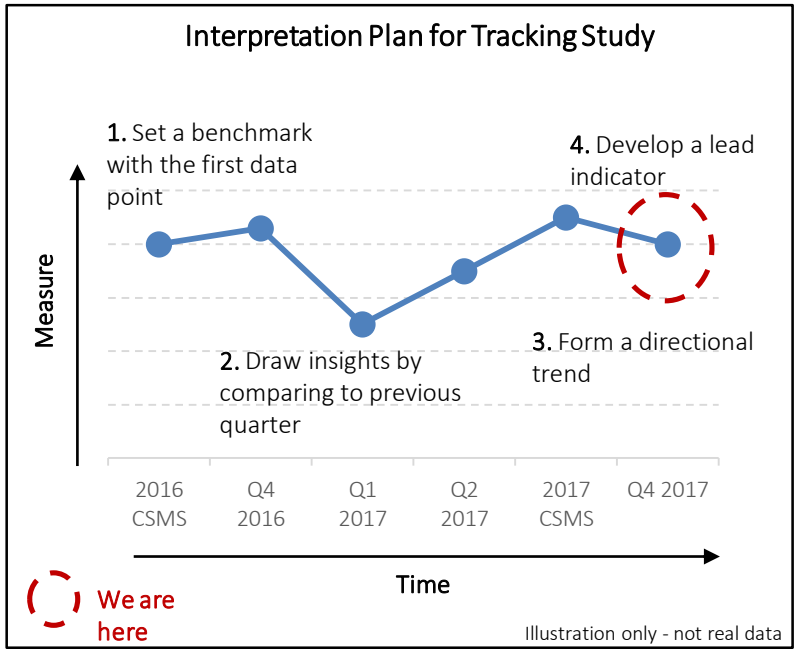
The table below provides an overview of the differences between the QPCS and CSMS:

Key Features	2017 Annual CSMS	Q4 2016 QPCS	Q1 2017 QPCS	Q2 2017 QPCS	Q4 2017 QPCS
Qualifying Criteria and Measurement Period	• Direct dealings with NSW public services within last 12 months • 2017 CSMS results are reflective of experiences with services between May 2016 and May 2017	• Direct dealings with NSW public services within last 6 months • Q4 2016 QPCS results are reflective of experiences with services between May 2016 and October 2016.	• Q1 2017 QPCS results are reflective of experiences with services between August 2016 and January 2017.	• Q2 2017 QPCS results are reflective of experiences with services between November 2016 and April 2017.	• Q4 2017 QPCS results are reflective of experiences with services between May 2017 and October 2017.
Customer Satisfaction Index	• All measure expectations, satisfaction and comparison with ideal service	• All measure expectations, satisfaction and comparison with ideal service			
Perceptions of Services & Satisfaction Drivers	• Measures perceptions of attributes • Drivers of satisfaction are derived from measurement at an attribute level for all drivers	• Measures perceptions of satisfaction drivers (asked directly) • Drivers of satisfaction as identified by the CSMS			
Sample Size	• Consumer n=4,013; Business n=1,133	• Consumer n=1,047; Business n=255	• Consumer n=1,005; Business n=262	• Consumer n=1,005; Business n=255	• Consumer n=1,002; Business n=241
Margin of Error for Customer Satisfaction Index (95% Confidence Interval)	• Consumer is ± 0.6 • Business is ± 1.1	• Consumer is ± 1.0 • Business is ± 2.3	• Consumer is ± 1.2 • Business is ± 2.8	• Consumer is ± 1.2 • Business is ± 2.5	• Consumer is ± 1.2 • Business is ± 2.6
Recency of Experience	Consumers: • 0-3 months: 57% • 3-6 months: 22% • 6-12 months: 21% Businesses: • 0-3 months: 50% • 3-6 months: 25% • 6-12 months: 25%	Consumers: • 0-3 months: 63% • 3-6 months: 37% Businesses: • 0-3 months: 66% • 3-6 months: 34%	Consumers: • 0-3 months: 65% • 3-6 months: 35% Businesses: • 0-3 months: 66% • 3-6 months: 34%	Consumers: • 0-3 months: 63% • 3-6 months: 37% Businesses: • 0-3 months: 63% • 3-6 months: 37%	Consumers: • 0-3 months: 61% • 3-6 months: 39% Businesses: • 0-3 months: 58% • 3-6 months: 42%

Appendix B – Background - Key Considerations for Interpreting QPCS Insights

General Considerations:

- The QPCS results do not replace the Annual CSMS results, but rather provides a directional indication of the shift in the results.
- Although the QPCS sample characteristics are closely representative of the NSW population, different customers have been surveyed and as such the results are directional indicators of shifts in the Annual CSMS results only.
- The margin of error (MoE) for the QPCS needs to be considered when interpreting the results.



Considerations for interpreting the QPCS data points:

- The QPCS results need to be interpreted in the context of the time of the year and in light of events in order to normalise seasonal trends in the data. Therefore, overall caution should be taken when interpreting the QPCS findings until a minimum of a full year of results has been collected, so that any seasonal impacts can be examined and adjusted accordingly.
- In the following slides, the results of Q4 2017 QPCS have been compared to the results of Q2 and Q1 2017 QPCS, and Q4 2016 QPCS. Significance testing is based on the comparison to Q2 2017 results at 95% confidence level, which was the recommended and endorsed approach for trend analysis as part of the QPCS Methodology Report (as opposed to 99% confidence level for CSMS).
- The Annual CSMS results have been provided as additional context for the QPCS data point and should not be used as a comparison to QPCS results.
- A longitudinal dataset will need to be built over time in order to identify 'real' trends in the QPCS results and to strengthen the reliability and validity of any conclusions drawn.

Appendix C - Focus Groups - Methodology

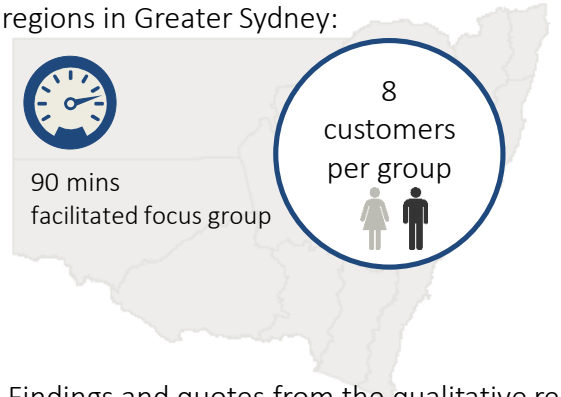
The primary objective of the QPCS online survey is to capture feedback on satisfaction and information on the drivers of satisfaction on a more regular basis. Qualitative research, conducted through focus groups, allows for the results of the online survey to be further understood and to provide additional context around the insights.

Qualitative Research Objective for Q4 2017

Understand what is driving changes in expectations and the relationship between expectation and satisfaction

QPCS Q4 2017 Focus Groups

Consistent with previous QPCS qualitative research methodology, for Q4 2017 three focus groups were held across two different geographical regions in Greater Sydney:



- Two consumer groups (Sydney CBD and Parramatta) and one business group (Sydney CBD) were held between 27-29 November 2017
- The focus groups comprised people who had direct dealings with NSW Government services in the last 6 months
- Respondents were selected to provide a mix of ages, genders, geographical locations, experiences and business size

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

Quotes from focus groups or verbatim comments within the QPCS survey are indicated throughout this report using this symbol: “ ”

Appendix C - Focus Groups – Key Insights– Consumer

The following outlines a summary of the discussions during focus groups and are not intended to be outcomes or recommendations.

Research Topic	*Key Insights*	*Supporting Quotes From Consumer Respondents*
Narrowing gap between satisfaction and expectation *Reasons for low or high expectations* *Reasons services met or didn't meet expectations*	• Consumers reported having low expectations of services when they perceive high amounts of pressure on staff due to inadequate systems, inefficient processes or a lack of sufficient resources and employees.	• "[I have low expectations] because of the systems they have to work under". • "Staff are busy, there are not enough of them, therefore I have low expectations" [Public Hospitals].
	• Expectations for consumers are not consistent across all NSW Government services and are largely dependent on the nature of the service provided. In particular, consumers reported higher levels of expectation for services relating to safety, health, or emergency relief in which they expect greater standards of care, empathy and efficiency.	• "Some services are more crucial, people have higher expectations because a life could be lost if they aren't done well". • "Expectation is high if you feel unsafe or if you feel like you need help like police or hospital, you feel that you need help and an extra hand". • "When you're going to a hospital you feel like you need extra care because you don't go to the hospital every day…as a customer you expect a little more, someone telling you where you have to go, what you have to do".
	• Consumers' expectations of services were exceeded when the associated processes were efficient and easy to navigate, and when they were provided with consistent communication and informative communication.	• " I was surprised with their efficiency, as I didn't expect that' [Public Hospitals]. • "The enrolment process was efficient, engaging, regular point of contact" [Public Schools].
	• Expectations are not met when consumers are not provided with adequate levels of support or regular communication from NSW Government employees and NSW Government services.	• "There's not much available compared to the past; the website is confusing" [TAFE]. • "We're the consumers, we're the ones paying the bills, so it's only fair that we should feel comfortable to make a call to make an enquiry" [Water Supply]. • "I found it strange that they don't follow through and that they put the onus back on you to follow it up" [eTag]. • "There's no transparency about the potential changes" [Public Transport]

Appendix C - Focus Groups – Key Insights– Businesses

The following outlines a summary of the discussions during focus groups and are not intended to be outcomes or recommendations.

Research Topic	*Key Insights*	*Supporting Quotes From Business Respondents*
Narrowing gap between satisfaction and expectation *Reasons for low or high expectations* *Reasons services met or didn't meet expectations*	• Similar to consumers, businesses have low expectations of NSW Government services on the basis of negative perceptions to do with systemic pressures associated with certain services or on the basis of negative prior experiences.	• "I thought that the Police wouldn't be that good because of the environment that they operate in, they operate under a lot of pressure, with a lot of issues coming at them. I wouldn't go into dealings with Police with high expectations because of the system that they're working in". • "I have low expectations and that way I won't get disappointed".
	• Businesses have higher expectations for NSW Government services that serve vulnerable or disadvantaged segments of the population. • Businesses also reported higher expectations for NSW Government services that had shown recent improvements in the quality of service delivered to customers.	• "I expect more for services for older people, older people shouldn't have to call up and wait on the phone for hours… I expect a much quicker service" [Services for Older People]. • "I have high expectation as they are getting better" [Documentation services].
	• Service expectations are exceeded for business customers when staff are proactive, take initiative, are informed and knowledgeable	• "[Staff were] easy to talk to, met my needs and were helpful" [Police]. • "[The staff] listen to and understand our needs".
	• For businesses, service expectations are not met when staff lack the necessary knowledge to allow them to achieve a positive outcome and when there is inadequate communication throughout the process.	• "Nice people but they couldn't answer my questions or needs and therefore there was no resolution" • "Staff lack knowledge…[Government Agencies] are siloed, like a business not a government service" • "The onus is on the customer – there is no ownership" [TAFE] • "The initial part was good and response was good, but the simple thing of following up and letting us know what they had done wasn't there" [SES]

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