

2019 Annual Customer Satisfaction Measurement Survey



Customer Service Commission



Chapter	Page no.	Reading Guide	
I Executive Summary and Whole of Government Recommendations	2	Overview of the study methodology, 2019 results for key performance measures, key findings from the overall data and whole of NSW government recommendations	Priority read 10 minutes
II Key Findings	13		
III Detailed Key Findings	24		Select by interest area
1 Customer Satisfaction Index (CSI) and Outcome Measures	25-58	Results for the CSI, outcome measures including trust and effort comparing performance year on year, by demographic and regional cohorts and by jurisdiction	30 minutes
Results for Consumer	25		15 minutes
Results for Business	41		15 minutes
2 Drivers of Satisfaction & Service Attributes	59-70	Results of specific service attributes across employees, process, values and goals over time as well as key primary opportunity areas for consumers and businesses	10 minutes
Results for Consumer	59		5 minutes
Results for Business	65		5 minutes
3 Contact Methods	71	Results for contact methods used and preferred, impact on overall satisfaction and expectations, attributes of online service and drivers of digital adoption	12 minutes
4 Brand Perceptions	83	Results for the NSW Public Service brand comparing performance over time and by jurisdictions, associations with word descriptors and awareness of advertising material related to NSW Government Including impact on overall satisfaction	10 minutes
5 Feedback to NSW Government services	91	Results for feedback including complaints, compliments and suggestions for change, the overall impact on satisfaction and expectation, the nature of the feedback, the handling of complaints and comparison by jurisdiction	8 minutes
6 Case Study: Service NSW	96	Results for feedback including complaints, compliments and suggestions for change, the overall impact on satisfaction and expectation, the nature of the feedback, the handling of complaints and comparison by jurisdiction	5 minutes
IV Appendices	104		
1 Background and Approach	105	Research programme background, objectives, scope and explanation of the Customer Satisfaction index (CSI)	10 minutes
2 Further Technical Information	112	Details of approach to data collection and management	5 minutes

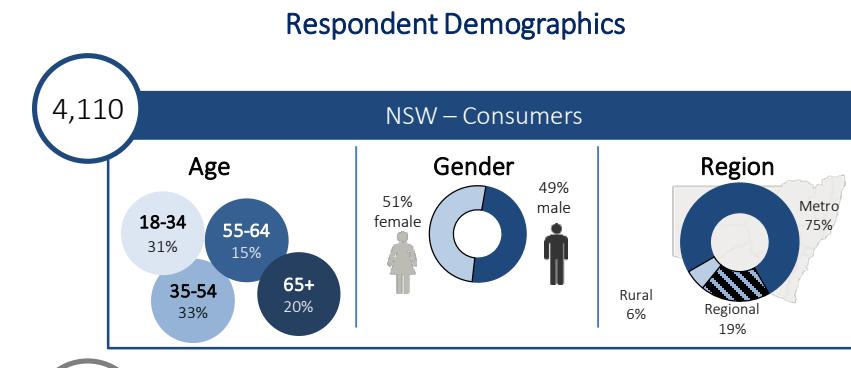
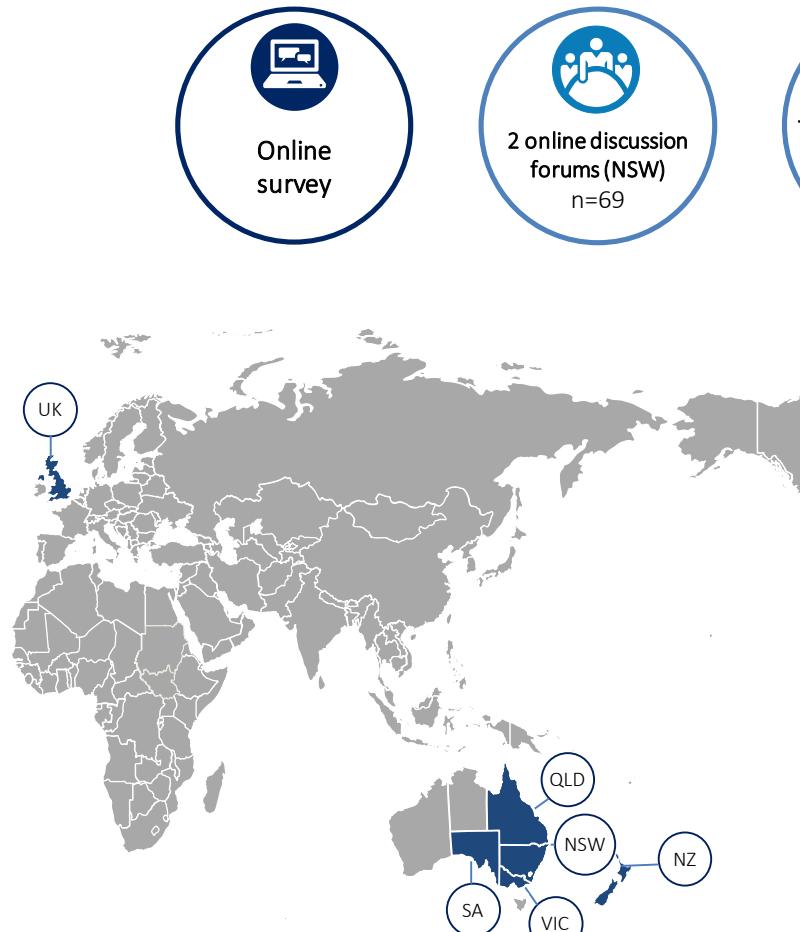


Customer
Service
Commission

I. Executive Summary



We surveyed over 14,000 consumers and 4,000 businesses in across 6 jurisdictions via the Annual Customer Satisfaction Measurement Survey in 2019



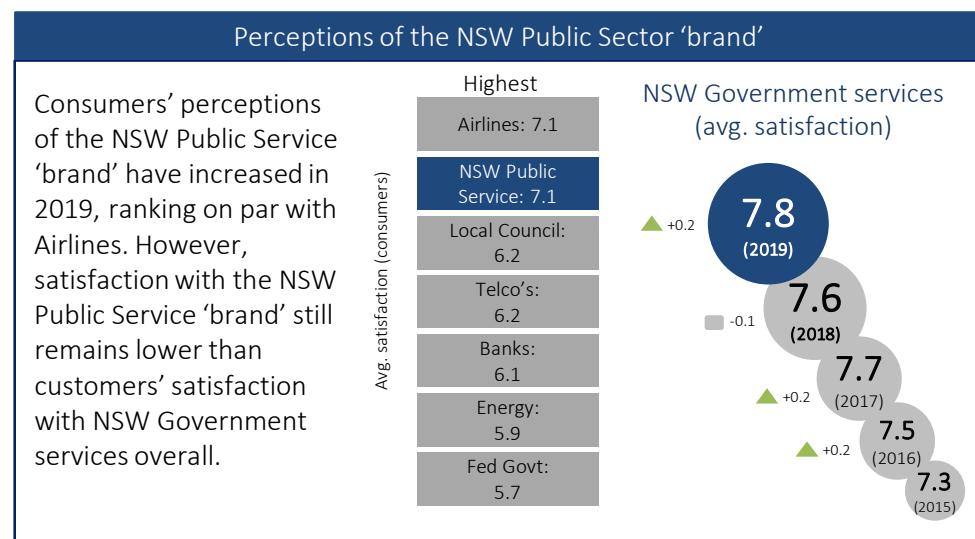
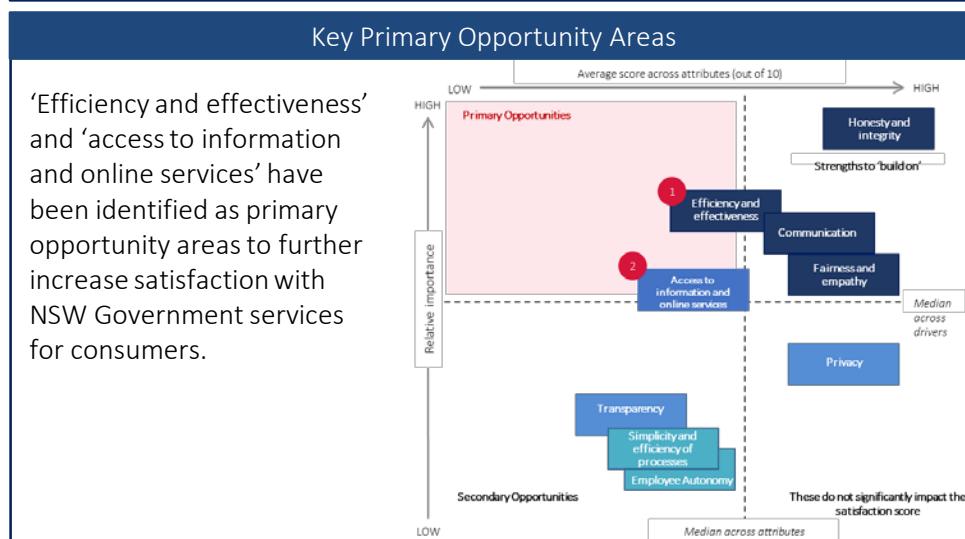
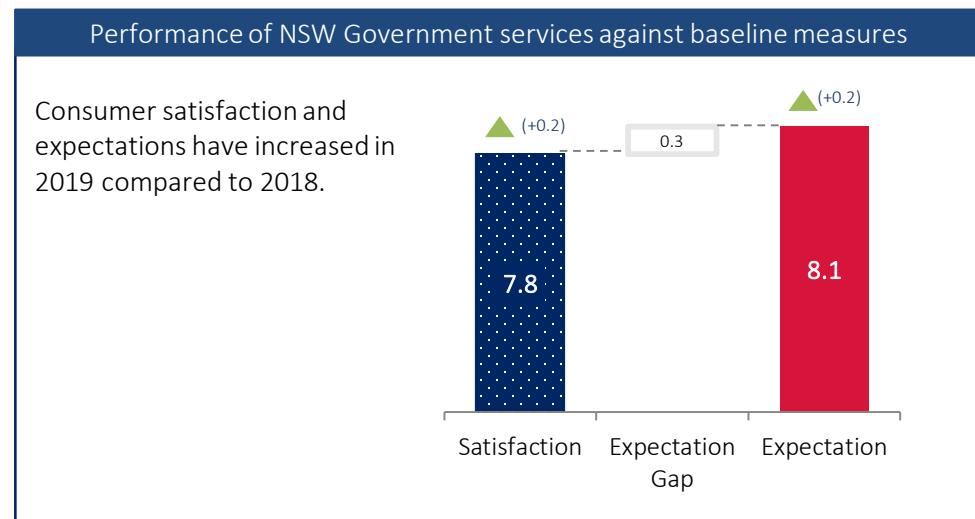
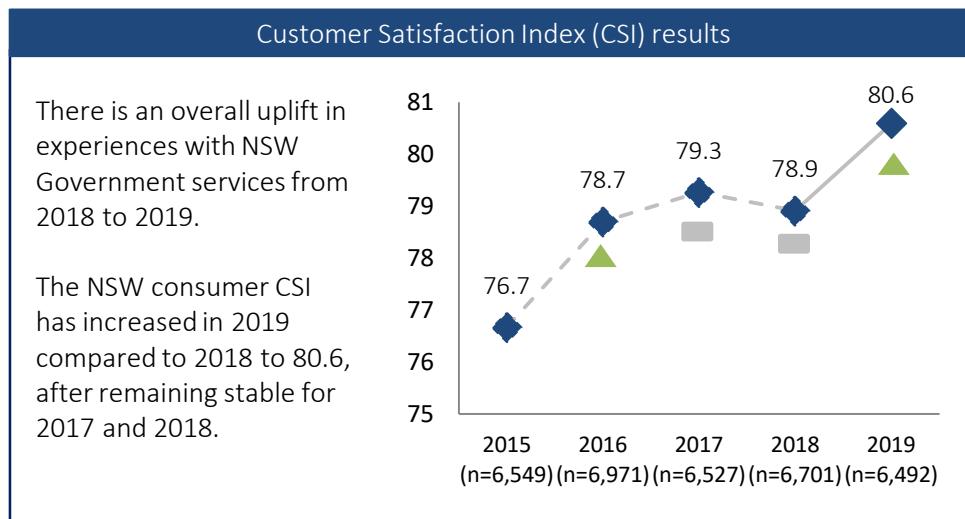
Other jurisdictions - Consumers				
Queensland	Victoria	South Australia	United Kingdom	New Zealand
2,019	2,073	1,998	2,019	2,116

Other jurisdictions - Businesses				
Queensland	Victoria	South Australia	United Kingdom	New Zealand
555	537	502	1,003	586

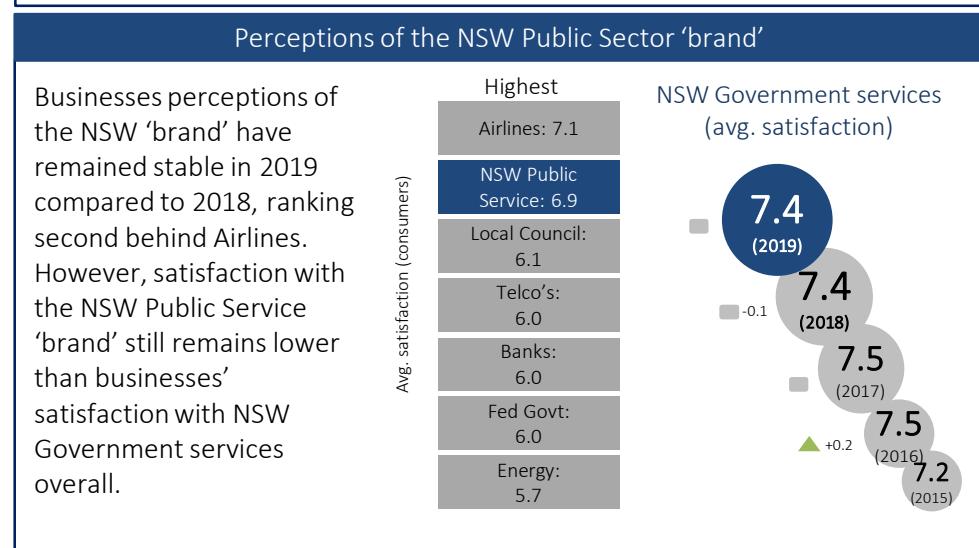
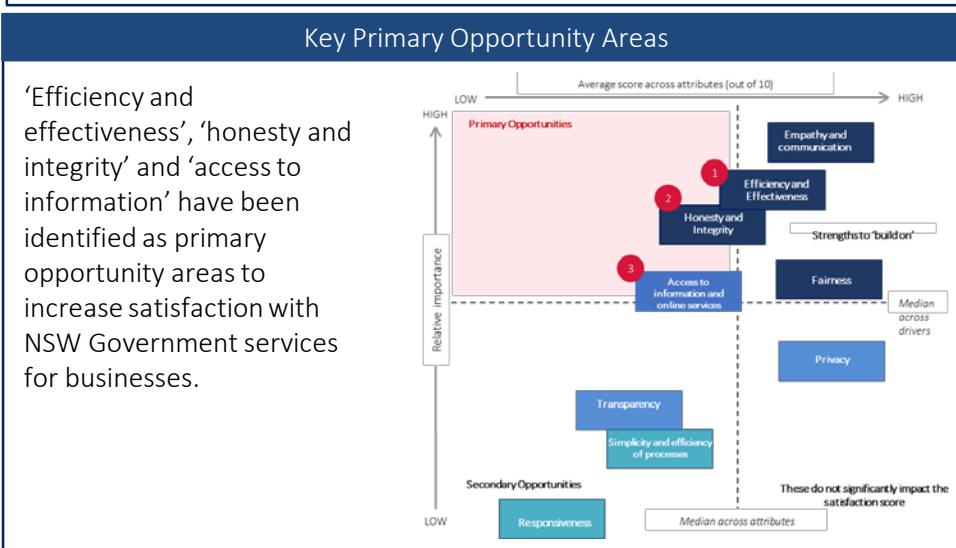
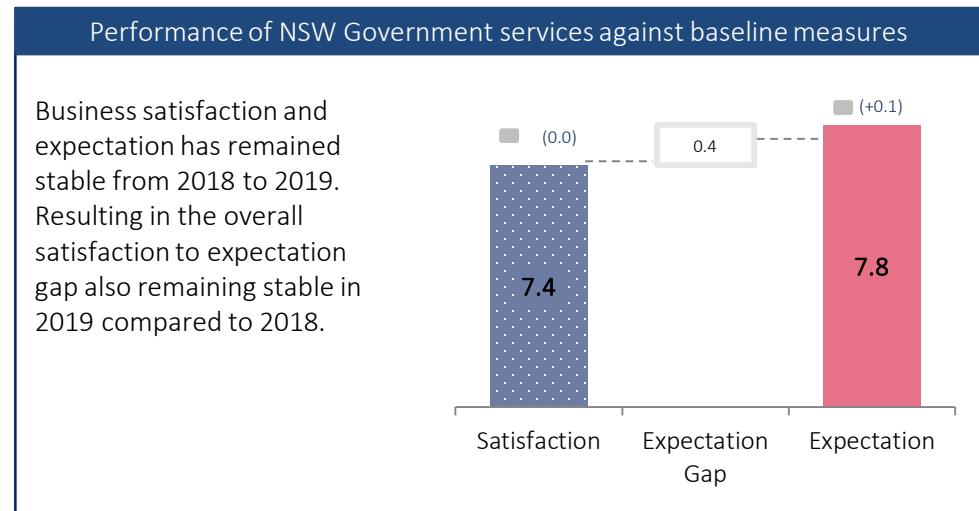
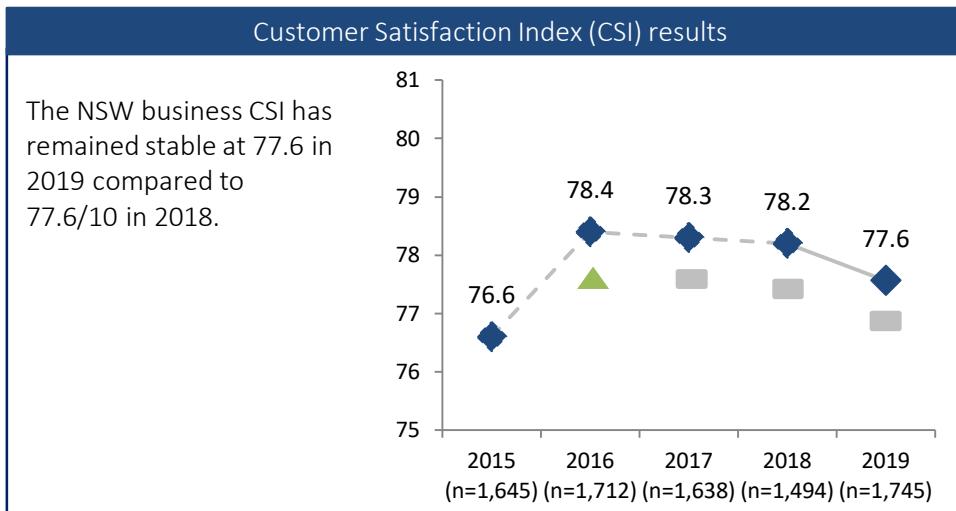
Note: Results are subject to rounding and may not sum to 100%



Executive summary: Consumers perception of NSW Government services has increased in 2019 compared to 2018



Executive summary: Business performance has remained stable in 2019 compared to 2018



The Whole of Government Recommendations

- 1 Make more services digital
- 2 Make it easier for customers to find the information they need
- 3 Accelerate delivery of transactions through Service NSW
- 4 Reduce service wait times and provide updates to customers at key service steps
- 5 Provide meaningful opportunities to engage with Government
- 6 Improve the customer experience of providing feedback to Government

1. Make more services digital

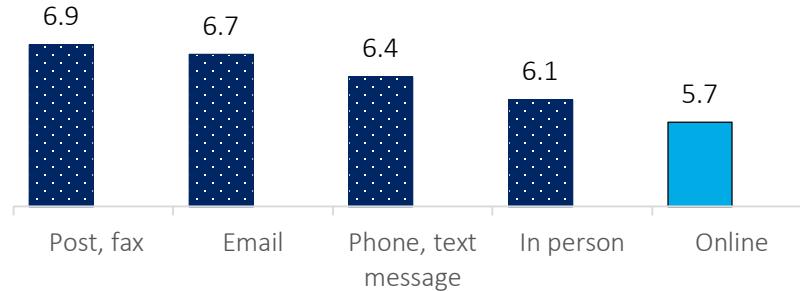
Findings

- Customers who engage with NSW Government services online report higher expectation, higher satisfaction, and lower effort.
- A good online experience is particularly important in driving satisfaction for younger and working people, and for transactional services where there is a higher preference for online.
- When interacting online, consumers are more likely to use a smartphone whilst businesses tend to choose the computer.
- Satisfaction with online NSW Government experiences is most strongly associated with:
 - An end-to-end offering – allowing customers to do everything they need to
 - Accessibility – format and content meeting customers' access requirements
 - Sufficiency – content and guidance answers all the customer's questions
 - Ease – the digital service is simple and easy to use

Actions

- Broaden and accelerate the availability of online service options, ensuring that:
 - experiences are end-to-end, accessible, sufficient and easy
 - online options are mobile first
 - both staff and customers are supported in the transition as more online services become available

Effort by channel (consumer)



2. Make it easier for customers to find the information they need

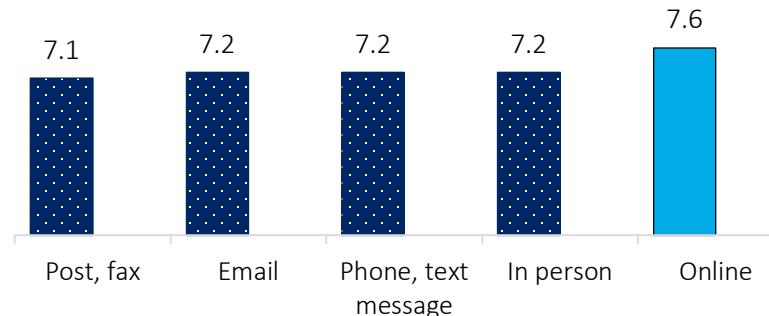
Findings

- Customer satisfaction with information about NSW Government services was found to be a key driver of satisfaction. This means that the way the NSW Government provides information to customers has a large impact on the customer experience overall.
- The Survey revealed that customers have a good experience when they can easily find and understand information about services, and when they can do this online.
- Previous research by the Customer Service Commissioner found that customer's value information that is consistent, accessible, recognises context, and provides a clear pathway to reach an outcome.

Actions

- NSW Government departments and agencies should implement a rolling schedule to review online information, including web analytics and customer feedback, so that customers are always provided with clear and consistent content in a way that supports the tasks or goals they are trying to complete.
- Continue to support the following initiatives to make it easier for customers to navigate the NSW Government and find the information they need:
 - NSW Government website consolidation project – NSW Government providing centralised and consistent access to information across the NSW Government so that customers know where to go.
 - Life Event Navigators – making the end to end experience across complex interactions with Government easier, particularly during difficult life events.

Average 'access to information' attribute score by channel (consumer)



3. Accelerate delivery of transactions through Service NSW

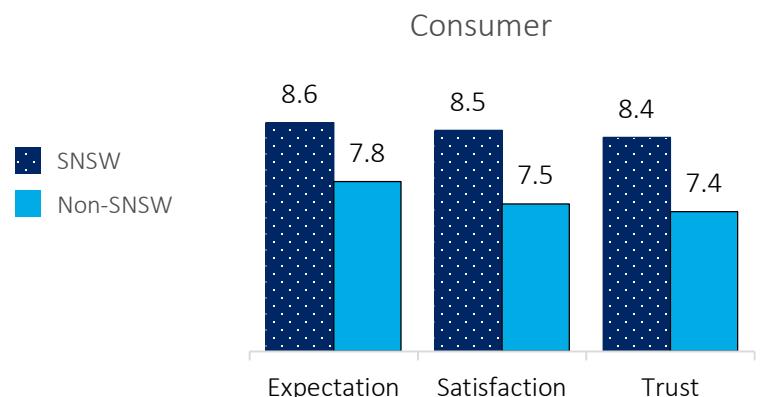
Findings

- Transactions delivered through Service NSW have higher overall satisfaction, expectation and trust scores when compared to similar NSW Government transactions completed outside Service NSW. This is true for both consumers and businesses.
- Transactions completed through Service NSW also have lower effort scores potentially as a consequence of the availability and quality of omnichannel options.
- Service NSW has a higher incidence of online usage and the highest satisfaction with online interactions when compared to other services.
- Customers perceive Service NSW to be particularly strong in the following areas:
 - employees get things done as quickly as possible
 - processes are designed to reduce wait times
 - customers can get to the right person first time; and
 - processes are easy to understand

Actions

- Continue to leverage Service NSW omnichannel solutions for transactions across the NSW Government, prioritising services that are currently high effort and that have a high customer preference for online.
- Where integration into Service NSW is not appropriate, adopt a similar omnichannel approach of providing seamless service delivery across channels.
- Build a one-stop shop for businesses through Service NSW providing tailored support for businesses within Service NSW service centres and supported by a single online portal for business information and digital transactions.

Headline measures by Service NSW and non-Service NSW transactions



4. Reduce service wait times and provide updates at key service steps

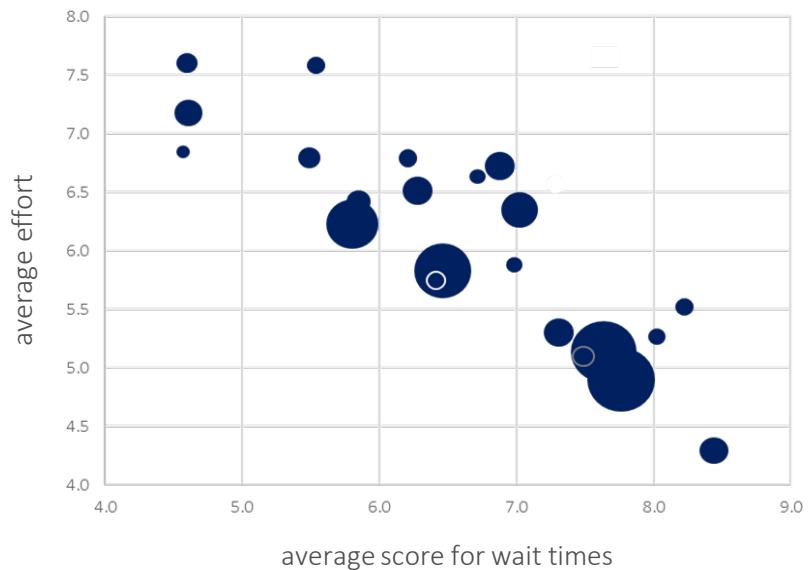
Findings

- Customers continue to rate NSW Government processes lower than employees, values (such as integrity and accountability), and goals (such as privacy and transparency).
- Customers have a positive experience and report lower effort when they feel that the service has been
 - designed to reduce wait times, and
 - when they can get to the right person the first time
- Previous research by the Customer Service Commission found that processes which provide clear steps and updates about where a customer is in the process are highly correlated with satisfaction and trust in NSW Government services, particularly when customers face uncertain or extended wait times.

Actions

- While wait times will vary for different service interactions, all service interactions should have wait time targets to improve the customer experience. Empowered front-line staff will be an invaluable resource in identifying opportunities to improve.
- New services should deliver proactive and timely status updates by design, using digital solutions where appropriate. Where they don't currently exist, status updates should be rapidly integrated into existing services.

Effort by perceived wait times for each service (consumer)



● each circle is a
different service

5. Provide meaningful opportunities to engage with Government

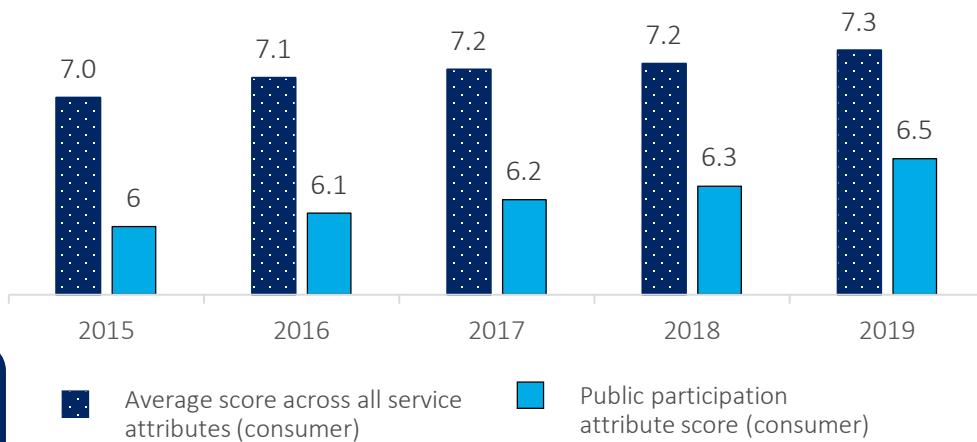
Findings

- For the third consecutive year, customers scored agreement with the service attribute that ‘the NSW Government encourages public participation in decision making’ the lowest of all service attributes.
- Public engagement is an important marker of customer experience as it is positively associated with trust in NSW Government services. In particular, community engagement in relation to transport, planning and environment services is strongly associated with trust.
- Previous research by the Customer Service Commissioner found the greatest opportunities to improve satisfaction with many services was to improve community engagement and demonstrate openness and transparency in decision-making.

Actions

- The Department of Customer Service, in consultation with clusters, should implement options to provide customers with genuine engagement opportunities, with a view to leveraging existing best-practice opportunities from across NSW Government agencies.

Public participation attribute score vs average score for all attributes (consumer)



“Everything’s a farce, they ask for our opinions but they’ve already decided, they’ve made their decision already”

“I like to be consulted and have opportunities to participate in issues that I am interested in”

6. Improve the customer experience of providing feedback to Government

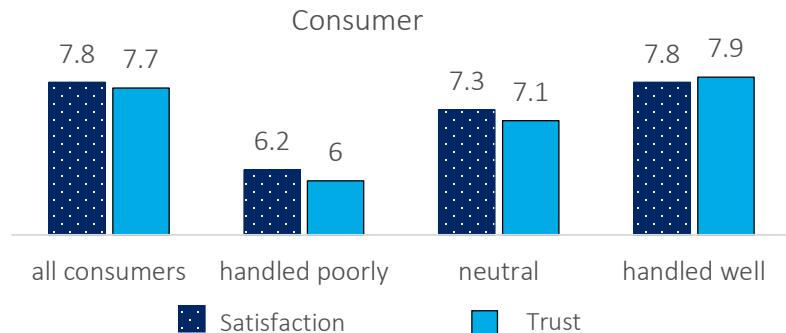
Findings

- Despite significant investment in the NSW Government's Complaint Handling Improvement Program there has not been a positive uplift in the customer experience of providing complaints.
- Compared to 2018, in 2019 customers find it more difficult to make a complaint. For consumers, those that found it 'easy' to make a complaint decreased by 3% compared to 2018. Similarly for businesses, those that found it 'easy' to make a complaint decreased by 12%.
- Customers are dissatisfied about the handling of their complaints. In 2019, more than half of complaints made by customers were rated as being handled poorly.
- Complaint handling scores across all channels are low.
- Poorly handled complaints significantly reduce satisfaction and trust. Well-handled complaints do not impact customers' satisfaction and trust in NSW Government services.

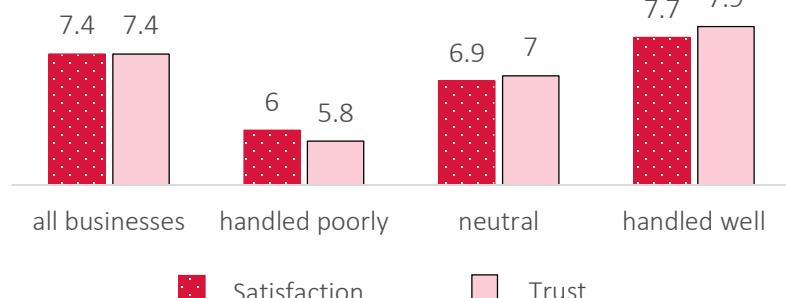
Actions

- Support the ongoing training of complaint handlers and general public sector employees, and consider mandating the Ombudsman's forthcoming complaint handling eLearning modules.
- Support the NSW Ombudsman to evaluate the performance of complaint handling across the Sector against the Commitments to Effective Complaint Handling and to showcase a best practice model.
- Review the effectiveness of online complaint channels including Feedback Assist.

Complaint handling experience by outcome measure



Business



II. Key Findings



Customer
Service
Commission



Summary of Key Findings

Theme	Key Findings	Evidence
CSI & Outcome measures  Consumer	1a. There is an overall uplift in experiences with NSW Government services from 2018 to 2019	<ul style="list-style-type: none">Customer Satisfaction Index (CSI) for consumers has increased to 80.6 in 2019 from 78.9 in 2018, above the 2015 to 2019 Premier's Priority Target of 79.02.The increase in the CSI can be attributed to increases across all three outcome measures since 2018: expectation, satisfaction and comparison to ideal scores. The result demonstrates that increasing positive views of consumers towards NSW Government services are associated with increasing expectations.This increase in consumer CSI from 2018 to 2019, is consistent with steady increases reflected in Quarterly Pulse Check Survey results.Compared to other jurisdictions, NSW ranks first in consumers' expectations and satisfaction in 2019, and second for comparison to ideal.Qualitative research shows that satisfaction has increased due to consumer expectations being met or exceeded when interacting with NSW Government services.Consumers expect to receive proactive communication, have access to professional staff, interact with processes that are user friendly and services which are straight forward to interact with.Consumers are experiencing greater ease and convenience when engaging with NSW Government services. They are also more confident that NSW government staff are able to be empathetic to their circumstances during interactions. These perceptions were primarily driven by consumer's interactions with Service NSW which seems to be playing a role in increasing overall satisfaction with NSW Government services.

Summary of Key Findings

Theme	Key Findings	Evidence
CSI & Outcome measures  Consumer	1b. Consumer effort when interacting with NSW Government services has remained stable from 2018 to 2019	<ul style="list-style-type: none"> Overall, consumer effort has remained stable in 2019 compared to 2018. Average effort of consumers is at 5.9/10, with 47% of consumers rating a high amount of effort when interacting with NSW Government services. Across jurisdictions, NSW ranks fourth behind New Zealand, South Australia and Queensland. Qualitative research suggests higher effort is experienced by consumers when services require engagement with multiple stakeholders and when information is inconsistent, unverifiable and needs to be updated across different channels. Lower effort is achieved by streamlining services through Service NSW.
	1c. Consumers have the highest trust in NSW Government services, across jurisdictions	<ul style="list-style-type: none"> Trust was introduced as an outcome measure in 2019. Overall trust score for consumers is 7.7/10; 78% of consumers rate overall trust with NSW Government services as high (7-10 out of 10) in 2019. Higher trust is closely correlated with expectations and satisfaction with NSW Government services. Qualitative findings indicate that Trust is determined by the consumer's belief that the government is acting in the best interest of its' citizens, and the hope that the government will do their best support. Trust can be built when consumer's existing expectations of staff and services are exceeded. The specific expectations which drive trust include having competent staff, secure handling of sensitive information, transparent processes, consistency of service and information and adherence to government rules and regulations.

Summary of Key Findings

Theme	Key Findings	Evidence
CSI & Outcome measures  Business	<p>1d. The business CSI remains unchanged in 2019 when compared to 2018 (78.2/100), maintaining the step change increase since 2015</p>	<ul style="list-style-type: none"> Business CSI has remained unchanged in 2019 at 77.6 compared to 78.2 in 2018 (not a statistically significant shift). This result is below the 2015-2019 Premier's Priority Target of 81.16 but is above the baseline of 76.6 from 2015. CSI remained unchanged due to business expectations of NSW Government services, satisfaction and comparison to ideal scores remaining stable compared to 2018. No change in results from 2018 to 2019 is consistent with external indices such as Roy Morgan and the Sensis index. Compared to other jurisdictions, NSW ranks first on expectation, third on satisfaction and fifth on comparison to ideal amongst businesses. Qualitative findings indicate that businesses expect to have services tailored to their needs, to have their information handled securely and to be treated like a valued client by taking the time to understand their specific circumstances. Business recognise these expectations are incredibly high but when they are met this builds trust and increases satisfaction with NSW Government services overall.

Summary of Key Findings

Theme	Key Findings	Evidence
CSI & Outcome measures  Business	1e. Business effort when interacting with NSW Government services has remained stable from 2018 to 2019	<ul style="list-style-type: none"> Overall, business effort has remained unchanged since 2018. Average effort of businesses is at 6.4/10. 57% of businesses identified that they put forth a high amount of effort when interacting with NSW Government services. Qualitative research suggests that businesses experienced high effort when: services lack proactive communication and interactions cannot be completed online. Services with lower effort tend to have a central, singular platform to process all information and adequate staff to support business needs. Across jurisdictions, NSW ranks equal third on effort by businesses behind South Australia and New Zealand and on par with Queensland.
	1f. Businesses that have higher trust with NSW Government services show higher outcome measure as well	<ul style="list-style-type: none"> Trust was introduced as an outcome measure in 2019. Overall trust score for businesses is 7.4/10; 73% of businesses rate overall trust with NSW Government services as high (7-10 out of 10) in 2019. Business trust is influenced by; the belief that government services have to adhere to strict regulations, the efficiency of the processes they are interacting with and the perceived security of their information. Trust is built when businesses feel that the government is making an effort to support them and tailor the service to their circumstances. NSW ranks third among businesses in comparison to other jurisdictions on trust, behind New Zealand and Queensland.

Summary of Key Findings

Theme	Key Findings	Evidence
Attributes & Drivers  Consumer	<p>2a. The average score against consumer attributes has increased in 2019</p>	<ul style="list-style-type: none"> Consumer results show increases across average scores for process, employee, goal and value related attributes, with no declines experienced across any attributes. Consistent to prior years, employee related attributes remains the highest scoring service area at 7.5/10, while process related attributes remain the lowest scoring at 6.9/10. A steady increase in performance against attributes is consistent with results from Q2 QPCS. High scoring employee and goals attributes such as 'are honest' and 'safeguard privacy' are attributed to important satisfaction drivers of 'honesty and integrity' and 'privacy'.
	<p>2b. 'Efficiency and effectiveness' and 'access to information and online services' are identified as primary opportunity areas for improving overall customer satisfaction in 2019 (consistent with 2018 drivers)</p>	<ul style="list-style-type: none"> 'Efficiency and effectiveness of employees' continues to be identified as a priority area to drive the biggest increase in consumer satisfaction with NSW Government services overall. This view is consistent with the findings from 2015, 2016, 2017 and 2018. <ul style="list-style-type: none"> From the qualitative research we understand that empathetic staff were able to help customers achieve their intended outcomes by understanding circumstances and tailoring the approach to their needs. This helps build rapport with the consumer, supporting them to gain the information or reach the desired outcome they set out to achieve whilst being efficient in the process. Qualitative research also suggests that consumers perceptions and their respective 'wait time' experiences can be highly influenced by the 'efficiency and effectiveness of employees'. Consumers who interacted with empathetic staff had a more positive perception of their 'wait time' experience and NSW Government services overall. 'Access to information and online services' remains a primary opportunity area in 2019 – attributes such as 'Is making it easier to access information about their services' and 'is making best use of online services to improve convenience and efficiency for customers' remain priority focus areas this year which is aligned with 2018 results. <ul style="list-style-type: none"> From qualitative research, we understand that ease of accessing information is associated with an experience which caters to all citizen demographics, circumstances, and is available through the consumer's preferred channel.

Summary of Key Findings

Theme	Key Findings	Evidence
Attributes & Drivers  Business	<p>2c. Scores against most employee and process related attributes for businesses have decreased in 2019 compared to 2018</p>	<ul style="list-style-type: none"> Business scores across process related attributes have seen a decrease since 2018, and remain the lowest scoring on average at 6.5/10. The process related attribute of 'I can get to the right person first time' scored lowest at 6.3/10 in 2019 compared to 6.7/10 in 2018. Business scores across employee related attributes have decreased compared to 2018. Employee related attributes remain on average the highest scoring at 7.2/10. With the employee related attribute 'are honest' scoring highest at 7.5/10, whilst 'Get things done as quickly as possible' scored lowest compared to all other employee attributes at 6.8/10.
	<p>2d. 'Efficiency and effectiveness', 'honesty and integrity' and 'access to information and online services' are identified as primary opportunity areas to increase businesses satisfaction in 2019 (access to information and online services is consistent with 2018)</p>	<ul style="list-style-type: none"> 'Honesty and integrity' and 'efficiency and effectiveness' are new primary opportunities in 2019. These results indicate the importance of employee attributes to businesses, which has seen a decrease in 2019. <ul style="list-style-type: none"> Qualitative research suggests that businesses prefer government staff who are able to provide a consistent and reliable service, are efficient, are able to address urgency and provide a timely resolution. In relation to 'access to information and online services', qualitative findings indicate that businesses are increasingly placing more emphasis and value on the online experience. Businesses see the online experience as a more efficient process that minimises their efforts, building trust and increasing positive sentiment. 'Empathy and communication' and 'fairness' are new strengths to build on throughout the year as they are of high importance to businesses. 'Fairness' relates to providing services without bias.

Summary of Key Findings

Theme	Key Findings	Evidence
 Consumer  Business	<p>3a. Face to face continues to be the most preferred and most used contact method, followed by online for consumers and email for businesses</p>	<ul style="list-style-type: none"> Overall contact method used is consistent in 2019 compared to 2018, consumers are still most likely to use face to face to interact with NSW Government services. Usage is in line with preference; face to face still remains the most preferred contact method for consumers and businesses, although preference for online is steadily increasing.
	<p>3b. Online interactions continue to be higher satisfaction and lower effort compared to other contact methods</p>	<ul style="list-style-type: none"> Satisfaction and expectations scores are highest for consumers and businesses that use online as their primary channel, followed by face to face. Consumers and businesses expect the online experience to be secure, user-friendly, responsive and seamless between online and face to face channels. For consumers and businesses, effort is lowest for those who interacted with NSW Government services online. Consumers and businesses experience lower effort when interaction online because: information is consolidated into one space, they are not required to bring physical documentation and interacting online provides more flexibility on where and when they can complete the process. Consumers and businesses who choose online do so as the process is faster, more efficient, flexible and they often need to complete a transactional process which is easier than face to face. Some simply have a poor perception of face to face, influenced by a previous experience, so prefer to go online instead. Qualitative research highlights that consumers and businesses sometimes do not go online as they are not aware that the service can be completed online or find the online experience to be alienating and uncomfortable due to their competency and confidence in using online services.

Summary of Key Findings

Theme	Key Findings	Evidence
Brand	4a. Consumers' perceptions of NSW Public Service overall increased, closing the gap with Airlines	<ul style="list-style-type: none"> All industries experienced an increase in brand perception in 2019 whilst airlines has remained stable. Consumers' perception of NSW Public Service overall increased by 0.3/10. This result means NSW Government services is equal to Airlines in overall consumer satisfaction in 2019. Most common positive descriptors of NSW Public Service overall have changed from 'knowledgeable' to 'capable' in 2019 compared to 2018. Increasing consumer perceptions are influenced by: <ul style="list-style-type: none"> increasing awareness of positive government initiatives such as rebates and discounts seen on promotional materials; and greater accessibility to facilities and online services due to digitisation - this has lead to moments of delight for consumers when interacting with government services.
	4b. Business perceptions of NSW Public Service overall have remained stable in 2019 compared to 2018	<ul style="list-style-type: none"> Business perceptions of NSW Public Service overall maintained its' overall rating of 6.9/10 in 2019 consistent with 2018. Airlines remained the leader compared to the other industries with the highest overall satisfaction. Brand perception by businesses across industries has remained stable compared to 2018, except for the Federal Government which increased by 3% from 5.7/10 in 2018 to 6.0/10 in 2019. The words used to describe NSW Government remain consistent in 2019 with the top three positive words being 'helpful', 'friendly' and 'capable', the same result compared to 2018. Qualitative results suggest that businesses recognize that the NSW Government is making improvements however it is still associated with being a slow moving entity with a greater need for the digitisation of services.

Summary of Key Findings

Theme	Key Findings	Evidence
Feedback   Consumer Business	5a. On average, consumers and businesses are finding it more difficult to make a complaint	<ul style="list-style-type: none"> For consumers, those that found it easy to provide feedback decreased by 3% compared to 2018. Similarly for businesses, those that found it easy to provide feedback decreased by 12%. These results indicate that consumers and businesses are consistently finding it difficult to provide feedback to NSW Government services compared to 2018. This was supported in qualitative research, as consumers and businesses found certain services difficult to make a complaint and unresponsive to complaints. Businesses have remained stable in terms of the amount of feedback provided. However, the nature of feedback as a complaint has increased by 10% to 37% in 2019. In addition, suggestions for change still represents the largest percentage of feedback at 41% in 2019. These results indicate that businesses are actively looking to provide suggestions to change NSW Government services but are finding it more difficult to provide such feedback.
  Consumer Business	5b. Complaints and suggestions more often relate to processes	<ul style="list-style-type: none"> For consumers and businesses, compliments are most prominent for employee related interactions; suggestions and complaints are typically related to processes. The majority of complaints, compliments and suggestions are made via face to face for consumers and via email for businesses.
  Consumer Business	5c. Complaint handling has been consistently below desired year on year, impacting satisfaction	<ul style="list-style-type: none"> In 2019, more than half of the complaints made by consumers and businesses were rated as being handled poorly (i.e. 1-4 out of 10). Consumers who rated overall complaints as handled poorly increased by 3% compared to 2018. Similarly for businesses, there is a 7% increase in overall complaints rated as handled poorly compared to 2018. Consumers that state their complaints were handled well have higher satisfaction, expectations and trust. For businesses, satisfaction and expectation has increased for complaints that are handled well compared to 2018, indicating that well handled complaints are especially important in determining business' overall satisfaction with a service.

Summary of Key Findings

Theme	Key Findings	Evidence
 Consumer Business	<p>6a. Consumers and businesses who interact with Service NSW have higher expectations, satisfaction, comparison to ideal scores and trust compared to those that did not interact with Service NSW</p>	<ul style="list-style-type: none"> Satisfaction with NSW Government services for consumers and businesses who interacted with Service NSW is 1.0/10 higher than those who did not interact with Service NSW. The most common interactions undertaken via Service NSW relate to 'apply/renew/modify registration' for consumers and 'apply/renew registration for a business vehicle' for businesses. The qualitative results clearly demonstrate that customers value the experience of interacting with Service NSW. Having an experience that is integrated between face to face and online channels and friendly informed staff makes interacting with the government significantly easier for consumers and businesses. Their positive experiences lead them to have higher expectations of NSW Government overall.
	<p>6b. Consumers and businesses who interact with Service NSW have lower effort scores, associated with higher online usage</p>	<ul style="list-style-type: none"> The average effort scores for undertaking similar interactions are lower for consumers and business that used Service NSW than other service providers. The proportion of consumers who rated low effort put forth (i.e. 1-4 out of 10) was 42% for those who interacted with Service NSW compared to 29% for those who used another service provider (a difference of 13%). Service NSW has a higher percentage of online interactions compared to other services; the ability to complete interactions online for Service NSW are likely contributing to overall lower effort scores.
	<p>6c. Service NSW score higher across all attributes than other services providing the same interactions for consumers and businesses</p>	<ul style="list-style-type: none"> For consumers, employees attributes of Service NSW scored highest at 8.1/10. The employee attribute of 'get things done quickly' had the largest difference in scores with Service NSW scoring 8.0/10 compared to 6.5/10 for other providers. For businesses, the process attributes 'processes reduce wait times', scored 1.1/10 higher for Service NSW businesses than those who received a similar service from another provider. These results were reflected in the qualitative findings with consumers focusing on the reassurance that they got from friendly staff and businesses being more focused on the overall process and efficiency of the service.

III. Detailed Key Findings



Customer
Service
Commission





1. CSI & Outcome Measures

Consumer



The CSI and outcome measures explained

The NSW Government Customer Satisfaction Index (CSI)

- The NSW Customer Satisfaction Index provides a measure of NSW Government performance in service delivery taking into account
 - How satisfied customers are,
 - How close their experience is to the expectations of that service; and
 - How close their experience is to an ideal service.
- An individual score across these three components is calculated for each respondent and is rebalanced to be on a scale of 0 to 100. Each individual score is then averaged across the total population to provide a Whole of Government measure.

Outcome Measures

- Expectation:** consumers and businesses were asked “Thinking about each of the following services in [State], how would you rate your expectation of overall quality of service?”
- Satisfaction:** consumers and businesses were asked “Thinking about your experiences in the last 12 months, how satisfied would you say you are with each of the following services in [State]?
 - Satisfaction gap to expectation:** the gap between consumers and businesses satisfaction and expectation. The gap to expectations is an indicator of the difference between the expected service level and the actual experience.
- Comparison to Ideal:** consumers and businesses were asked “Now forgetting for a moment these specific services, please imagine an ideal service. How well do you think each service in [State] compares with that ideal service?”
- Effort:** consumers and businesses were asked “Thinking now about your direct dealings with [Service], how much effort did your personally have to put forth?”
- Trust:** consumers and businesses were asked “Please indicate how much you trust the following services in [State] to do what is right?”

Figure 1.1: NSW Government Customer Satisfaction Index (CSI)

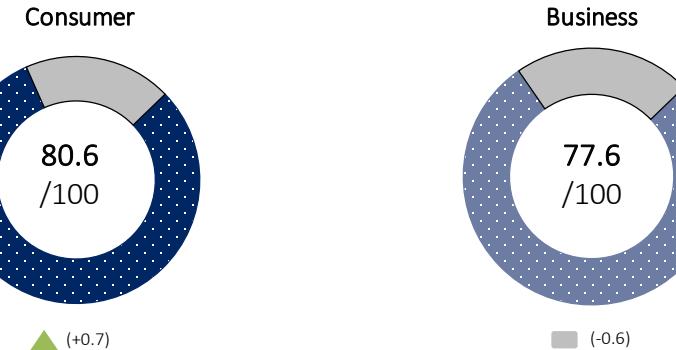
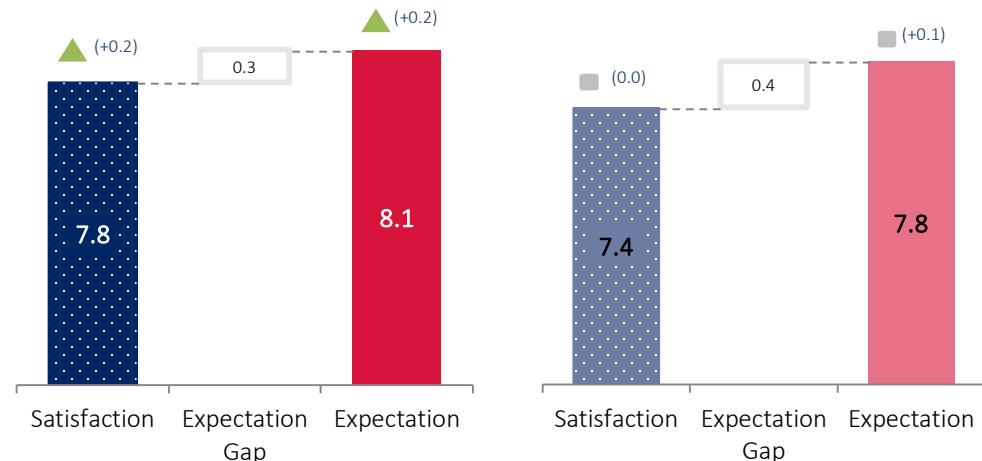


Figure 1.2: Satisfaction, Expectation and Expectation gap



Legend:

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



Consumer CSI has increased overall, with an increase across all three outcome measures

Key Points:

- Consumer CSI has increased to 80.6 in 2019 compared to 78.9 in 2018. This is higher than the 2015-2019 Premier's Priority Target of 79.02/100.
- The increase in CSI is driven by increases in consumer's perception of NSW Government performance against all three outcome measures of expectation, satisfaction and comparison to ideal service.
- The results indicate that consumer perceptions of NSW Government performance are increasing along with their expectations.

Figure 1.3: Customer Satisfaction Index – Consumer (out of 100)

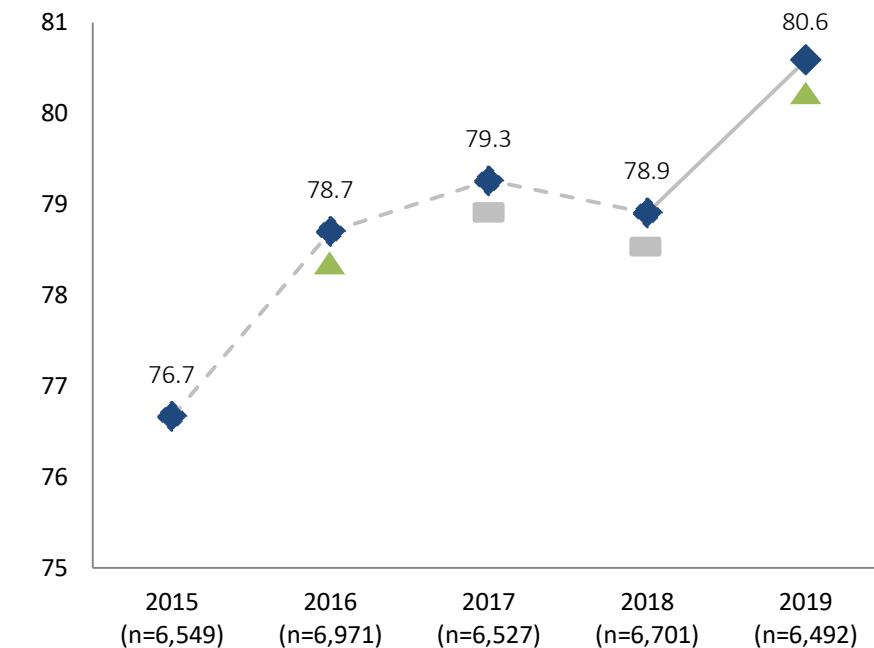
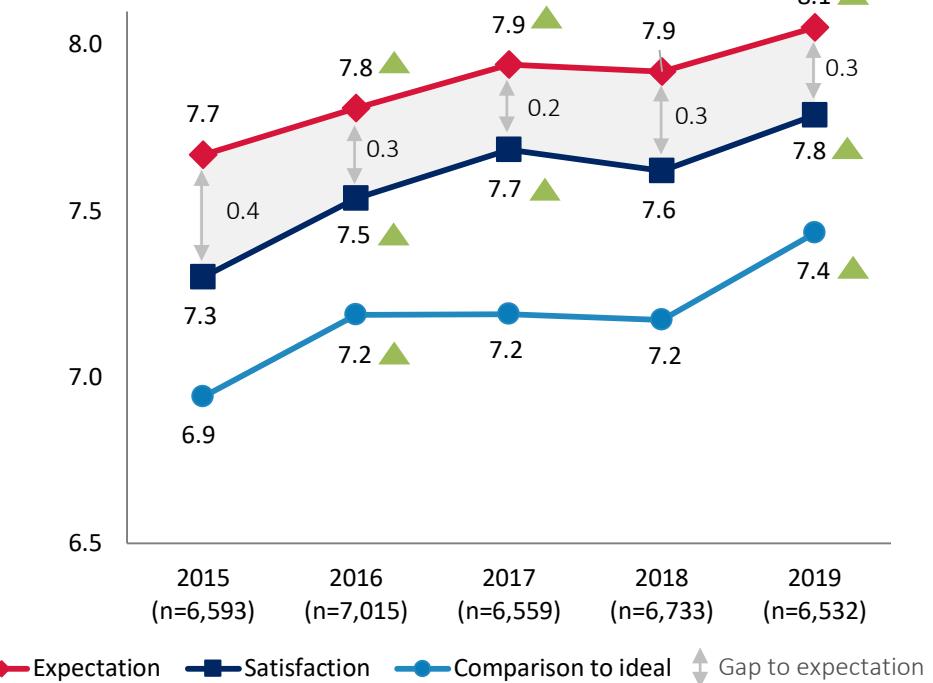


Figure 1.4: Top line performance – Consumer (out of 10)



Legend:

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



The increase in Consumer CSI from 2018 to 2019 is consistent with steady increases reflected in Quarterly Pulse Check Survey results

Key Points

- The increase in consumer CSI from 2018 to 2019 is consistent with steady increases observed in Quarterly Pulse Check Survey (QPCS) results.
- Driving the increase CSI is a steady increase in all outcome measures since Q1 2019 results.

Figure 1.5: Customer Satisfaction Index - Consumer

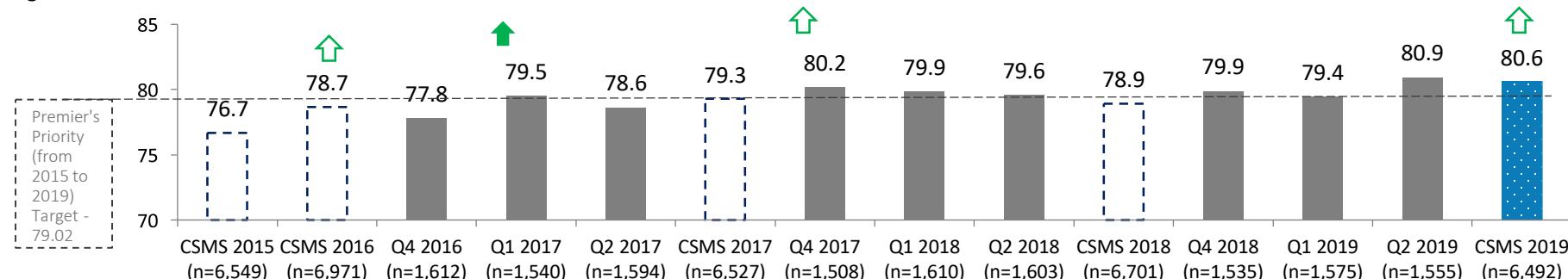
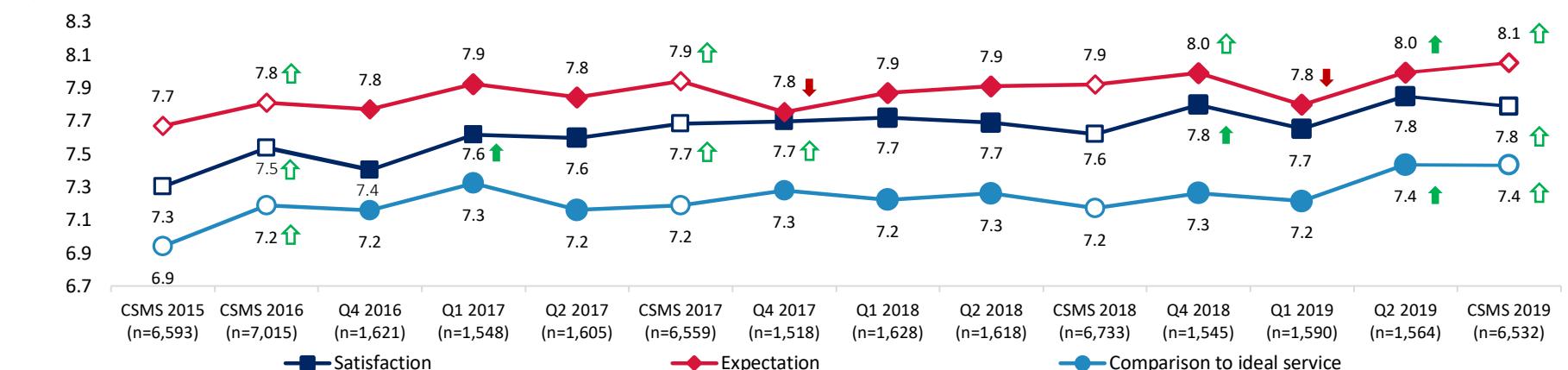


Figure 1.6: Top line performance - Consumer



⬆️⬇️ Statistically significant movement from previous quarter at 99% confidence level

⬆️⬇️ Statistically significant movement from same quarter previous year at 99% confidence level

No significant movement from previous quarter or same quarter previous year at 99% confidence level

Increasing satisfaction with NSW Government services is a result of greater convenience in services and confidence in staff

1

Consumers are experiencing increasing ease and convenience when engaging with NSW Government services.

- Consumers are positive about the increasing digitisation of government services. With greater access to services online, consumers are able to complete processes more efficiently.
- Many referred to their Service NSW experience, mentioning the ability complete the interaction online and face to face gave them the convenience to complete the process in a timely and effective manner that is hassle-free.
- These experiences and many more have exceeded consumer expectations, building trust and informing positive sentiment with NSW Government services.

2

Consumers are more confident that NSW government staff are able to be empathetic to their circumstances during interactions.

- Consumers recall more experiences with government employees where care and consideration is shown. Staff are being more empathetic when appropriate to the consumer's circumstances.
- These interactions made consumers feel more at ease, informed and important especially during vulnerable circumstances such as interactions with Police services, Public hospitals and Ambulance services.
- These experiences made consumers feel more than just a number, helping to exceed expectations and informing positive sentiment with NSW Government services.

*"In regards to Service NSW, I feel that they do such an amazing job providing such a **vast array of services** and I often wonder how the staff manage to keep up with what they have to do...I feel Service NSW **exceeds my expectations** with the **range of transactions, level of service by staff** and the choice of **processing things via internet, call centre, over the counter or via the staff** who greet you at the front door."*

*"TAFE campus **online courses**, so more people can access them in an online classroom environment...It provided a **positive experience** with TAFE as I can study without having to drive over an hour to get to the campus, **saves me fuel and time caught in traffic**."*

*"The attending staff member was very **informed of the process** but also very kind and patient...gave a **clear expectation** of the time frame of the process although we were finished in a much quicker time....I was **very satisfied**...gave us a clear indication at the end of what to expect next - and this was exactly what happened, It did **lift my expectations and trust**."*

*"I have noticed ongoing improvement and **professionalism** within Service NSW...**friendly professional positive service** when I have gone in and asked questions...very **quick and prompt service** and offers to have a seat while I wait, very **kind and courteous service**."*

Further qualitative research reveals consumer expectations is influenced by accurate information, professional staff and user friendly processes

Overall, consumers expect NSW government services to act in the best interests of and care for its citizens.

Consumers expect to be provided with prompt and accurate information across channels.

- Consumers expect to have easy access, clear, and valuable information across all channels and government interactions. This improves 'access to information and online services', which is a primary opportunity area to increase satisfaction in 2019.
- Customers expect that information given to them from the NSW government will be accurate the first time they receive it.
- Customer's want to be communicated and reminded proactively by government services.

Consumers expect to professional staff that are able to consistently achieve outcomes.

- Consumers expect staff to treat them fairly, listen and make an effort to understand their situation
- Compared to the private sector, consumers expect government staff to have more knowledge of the process in the hope of providing valuable insights and be able to deliver a consistent service.

Consumers expect processes to be user friendly and citizen-centric.

- Consumers expect government services to be citizen centric, meaning that they are designed with the end user in mind.
- This expectation means that consumers want the government to understand their specific circumstances and treat them accordingly. Processes are expected to have a clear set of guidelines, easy to follow, able to be completed entirely by the citizen and designed to reduce wait times.
- Meeting these expectations allows consumers to be confident that the government has their best interests at heart.

*"To be treated with **respect, promptness and compassion**..having a **compassionate staff member**...is truly a godsend. It can turn a really bad day into one of relief...It does **make a difference** and have an impact in daily lives."*

*"When I engage with public hospital service I ...expect them to have **adequate personnel on hand** and expect a **reasonable delay**. To wait in the waiting room for over 2 hours and not progress in any way to seeing a doctor is **not acceptable**."*

Service specific expectations

Public Hospitals:

- Adequate staffing to ensure all patients are being seen in a timely manner.
- Accurate and consistent information to remove duplicative steps.

Public Transport:

- Feeling safe on transportation services from road accidents was a reoccurring expectation for consumers using public transport.
- Reliability and timeliness of services is expected.

Service NSW:

- Front of office staff are friendly and knowledgeable.
- Experience is seamless as the online is integrated in the offline experience.



Satisfaction and expectation amongst consumers has increased across Metropolitan NSW in 2019; however regional consumers remain the most satisfied

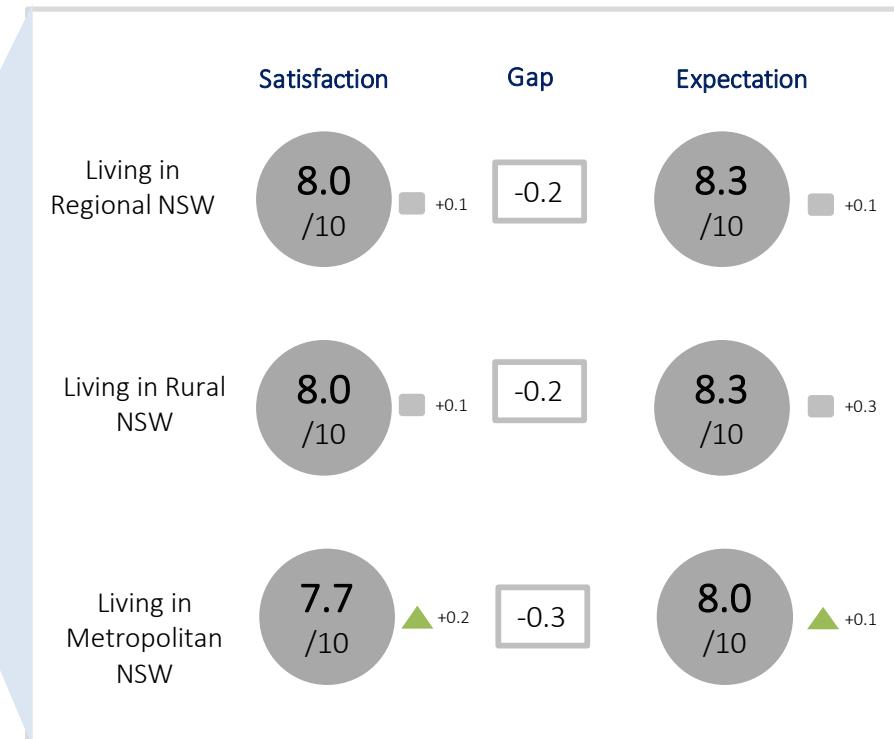
Key Points

- NSW Consumers' satisfaction and expectation of Government has increased across Metropolitan NSW, whilst rural and regional NSW remained stable in 2019 compared to 2018.
- Highest satisfaction with NSW Government services is among females and those on an income between \$30,001-\$50,000.
- Lowest satisfaction with NSW Government services is among males and those living in Metropolitan NSW.

Figure 1.7: Consumer satisfaction by demographic cohorts

	Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)
Age	65 years +	18-24 years	18-24 years
Region	Regional	Metropolitan▲	Metropolitan
Employment status	Retired	Unemployed	Unemployed
Gender	Females▲	Males▲	Females
Income	\$30,001 - \$50,000▲	Up to \$30,000	\$150,001 - \$180,000

Figure 1.8 Satisfaction and expectation by region





Consumers with no disability and who speak English only experienced greater increases in satisfaction from 2018 to 2019

Key Points

Consumer satisfaction and gap to expectation was compared across:

- Disability: Consumer satisfaction and expectation of NSW Government Services increased for those with a mental health condition in 2019
- Aboriginal and Torre Strait Islander (ATSI): Satisfaction with NSW Government services is higher for those who are not from an ATSI background
- Language: Satisfaction with NSW Government services is higher for consumers who only speak English at home versus those who speak another language

Figure 1.9: Consumer satisfaction by disability, ethnicity and languages used

	Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)
Disability	Longstanding illness (8.1/10)	Learning disability (6.8/10)	Blindness or partially sighted (-0.5)
ATSI*	Not of Aboriginal or Torres Strait Islander Origin (7.8/10)	Aboriginal and/or Torres Strait Islander (7.2/10)	Aboriginal and/or Torres Strait Islander (-0.5)
Language**	English only (7.8/10) 	Language other than English (7.3/10)	Language other than English (-0.6)

Figure 1.10: Satisfaction and expectation by disability

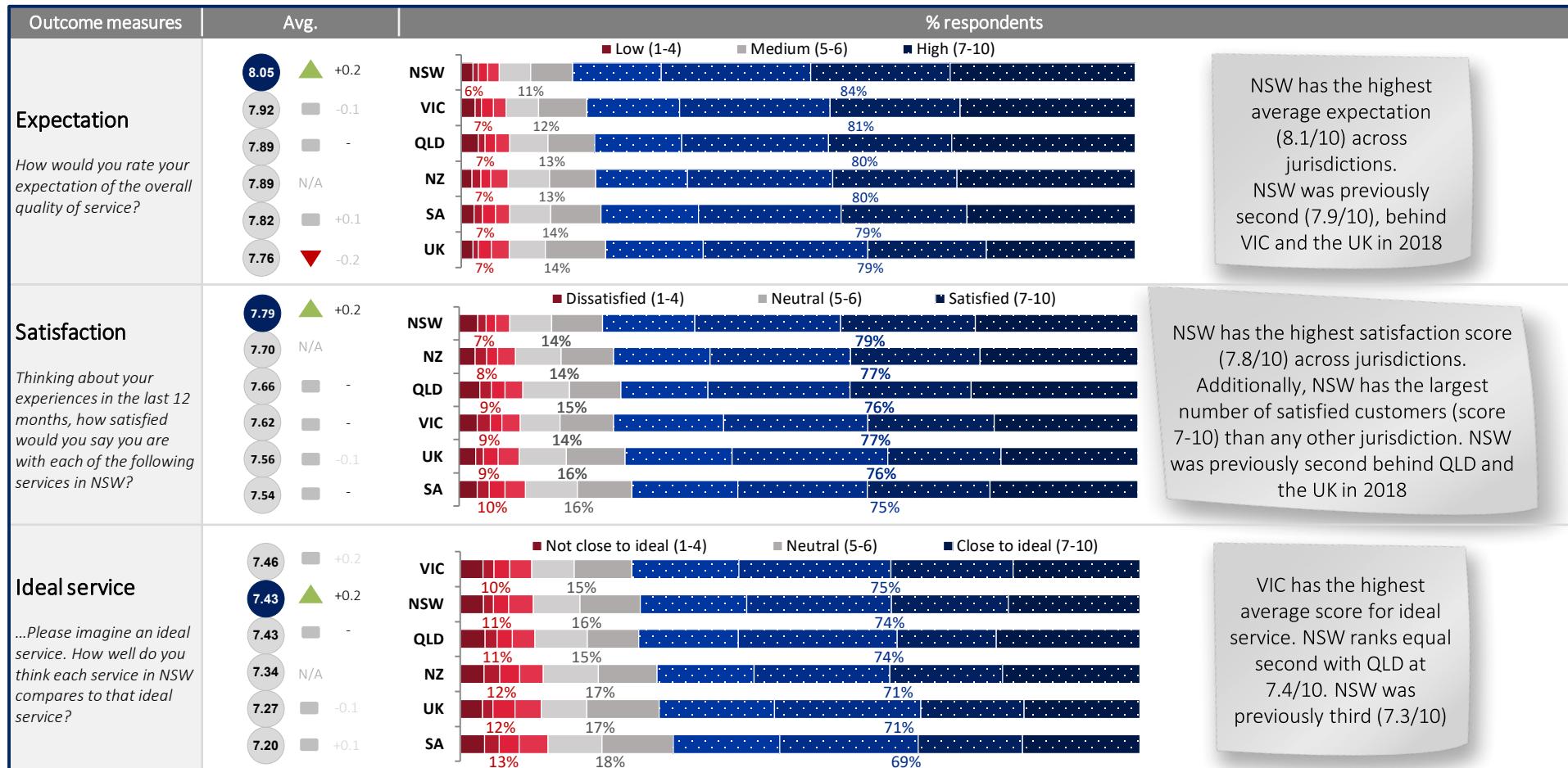




NSW rank first in consumer satisfaction and expectation across jurisdictions in 2019

Key Points

- NSW Consumers' perception of NSW Government performance has increased across all three outcome measures, ranking first in consumers' expectations and satisfaction in 2019, and second behind Victoria for ideal services across jurisdictions.





Consumer effort when interacting with NSW Government services has remained stable from 2018 to 2019

Key Points

- Overall effort has remained stable for consumers from 2018 to 2019. 47% of respondents rated interactions with NSW Government services as high effort (i.e. 7-10 out of 10), compared to 49% in 2018 (statistically insignificant change).
- with the proportion of consumers that rated low effort put forth (i.e. 1-4 out of 10) increasing by 2%.
- Reducing effort improves perceptions of interacting with NSW Government services - average satisfaction, expectation, comparison to ideal and trust scores are all higher for those consumers that rated effort as being lower.

Figure 1.11: Breakdown of effort by consumer

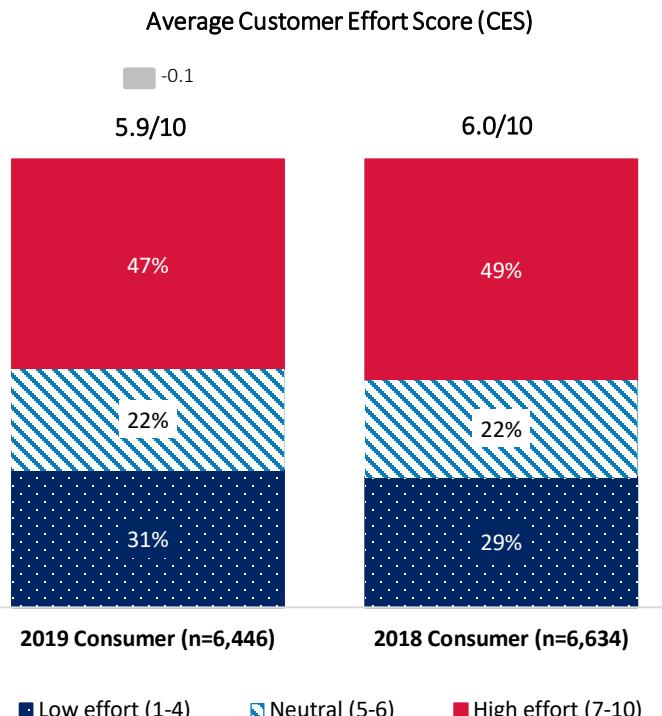
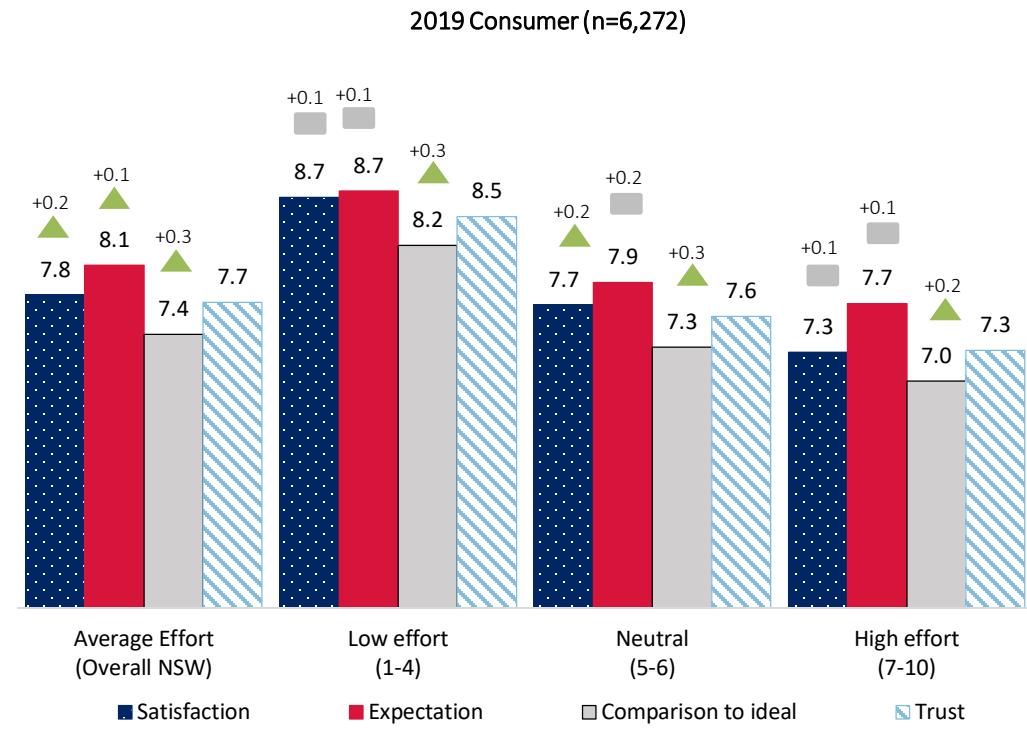


Figure 1.12: Effort to outcome measures by consumer (out of 10)



High consumer effort is informed by legacy systems and inconsistent information

Higher consumer effort is experienced when...

Services require engagement with multiple systems and personnel.

- When information is frequently exchanged between systems or people it can lead to loss of information, creating duplicative steps and time to find the necessary information which is a major pain point.

Original documentation and manual paperwork need to be filled out.

- Consumers experience high effort with services that require original documentation to be verified and need to manually fill in paperwork which can be a repetitive process.
- This is especially true for interactions relating to Public hospitals, Police services and documentation services as identity verification is required and duplicated at various points.

Information is not easily accessible.

- Consumers experience high effort when information they are looking for is not available to them on their preferred channel. This causes time and effort to seek out the information for themselves in a channel they do not find most convenient to use.

*"My daughter was admitted to a...children's hospital...the information between departments/wards became lost. Our daughter's **admission letter** from our GP had become lost at emergency...we kept having to **repeat previous findings** with doctors within each department. This was a little **frustrating**."*

*"I find when it comes to the RMS **a lot of paperwork** and forms are always involved. The process tends to take a lot of **time and effort** and am usually back and forwards getting separate issues assessed."*

However, consumers believe services are increasingly becoming lower effort as...

Services are becoming increasingly digitised.

- Consumers find digital experiences to be fast and responsive to their needs.
- The ease of navigation, single source of truth and reduction in paperwork that the online experience provides helps to ease the level of effort associated with the service.
- For example, consumers report improvements in the Public Transport Opal card system, as transactions and payments can be easily accessed and completed digitally. Consumers found the service to be timely and efficient, meeting their expectations resulting in a satisfactory outcome and maintaining trust.

*"Actually, I quite like the use of **internet-based services** that replace going to govt. offices and waiting in long queues. An example is applying for a drivers licence or paying for car rego. All made easy and fast."*

Services are becoming more seamless.

- Consumers report an increase in interactions where the face to face and online experience have been integrated into one.
- Consumers often related this to Service NSW experiences, suggesting that the transition from a user friendly online experience to a face to face interaction with competent staff has reduced the effort associated with an interaction like renewing a driver license, or applying for car and boat registration.

*"I think the car registration as it is **simplified to make it easier**. You can go **online or into an office**. There is **staff to help you through the process** in the office or online it is spelled out step by step. Very **fast and efficient** process."*

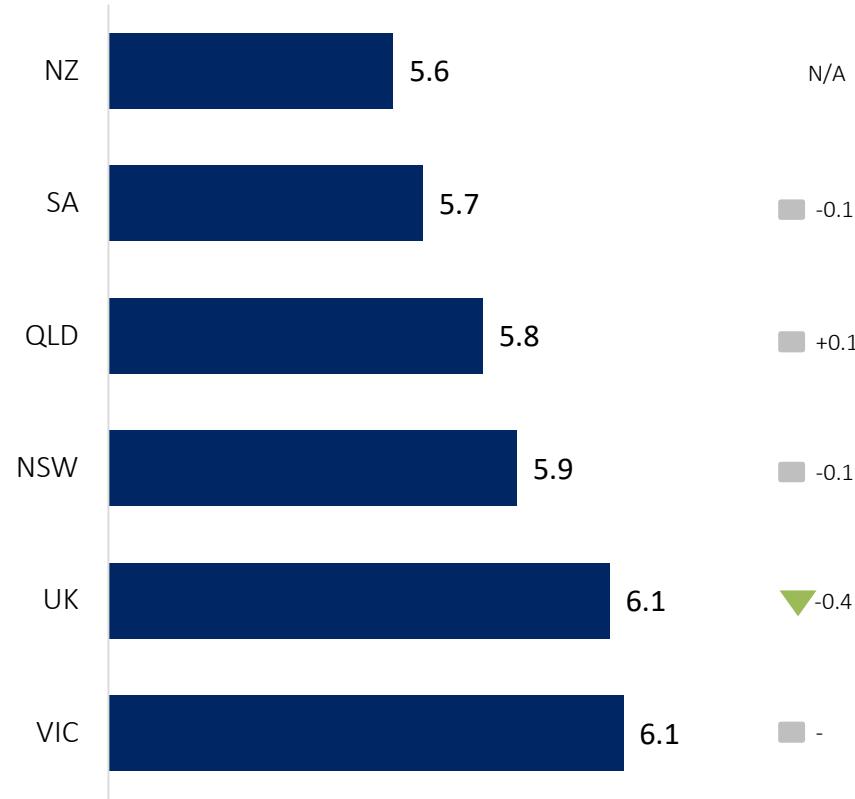


For consumers, NSW ranks fourth in Customer Effort Score compared to other jurisdictions

NSW is fourth behind New Zealand, South Australia and Queensland for consumers Customer Effort Score (CES), remaining stable at 5.9/10 in 2019 compared to 6.0/10 in 2018.

Consumer's CES remained stable across all jurisdictions, with the exception of United Kingdom, which experienced a 0.4 decrease in effort in 2019 compared to 2018.

Figure 1.13: Consumer CES by jurisdiction



Statistically significant increase in avg. from previous year (at 99% level of Confidence)



No significant change in avg. from previous year (at 99% level of Confidence)



Statistically significant decrease in avg. from previous year (at 99% level of Confidence)



The Customer Effort Score amongst all consumer demographic cohorts and regions is similar to 2018 results

Highest effort by demographic:

- Age: 18-24 years
- Region: Metropolitan
- Employment: Student
- Gender: Male
- Income: Up to \$30,000

Qualitative research suggests that the 18-24 year old cohort tended to report higher expectations of NSW Government services compared to other age groups.

When compared to private sector, they mentioned the need for NSW Government to keep up with private sector expectations in providing a seamless digital experience.

Lowest effort by demographic:

- Age: 65 years+
- Region: Regional
- Employment: Retired
- Gender: Female (Decrease in 2019)
- Income: Over \$180,000

Figure 1.14 Consumer CES by demographic cohort

	Highest effort (within demographic category)	Lowest effort (within demographic category)	Highest Increase in effort since 2018	Highest Decrease in effort since 2018
Age	18-24 years	65 years +	45-54 years	65 years +
Region	Metropolitan	Regional	Nil	Regional
Employment status	Student	Retired	Unemployed	On maternity/paternity leave
Gender	Male	Female	Nil	Female
Income	Up to \$30,000	Over \$180,000	\$100,001 - \$150,00	\$30,001 - \$50,000

Labels in green/red indicate highest satisfaction/lowest satisfaction within the respective demographic group

Legend:



Statistically significant increase in avg. from previous year (at 99% level of Confidence)



No significant change in avg. from previous year (at 99% level of Confidence)



Statistically significant decrease in avg. from previous year (at 99% level of Confidence)



High trust of NSW consumers has positively influenced outcome measures

Key Points

- Trust has been introduced as an outcome measure in 2019.
- Overall trust score for consumers is 7.7/10. 78% of consumers rated overall trust with NSW Government services as high.
- Higher trust is closely correlated with greater satisfaction and expectation with NSW Government services.
- Consumers who have high trust also have higher satisfaction in NSW Government services overall.

Figure 1.15: Breakdown of overall trust – Consumer

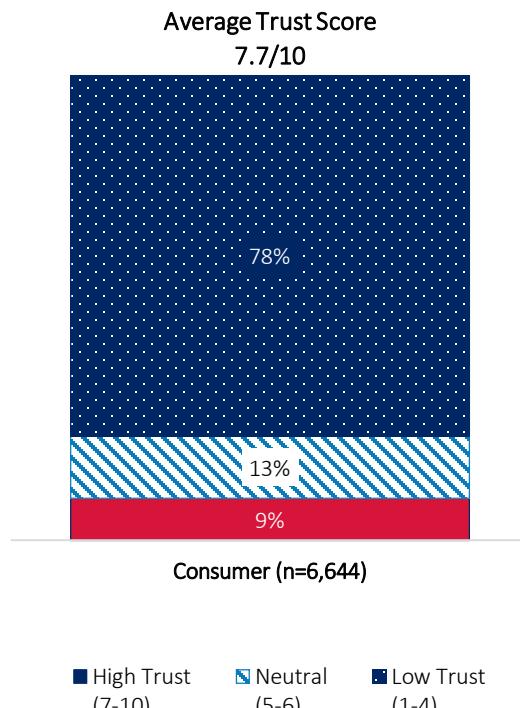
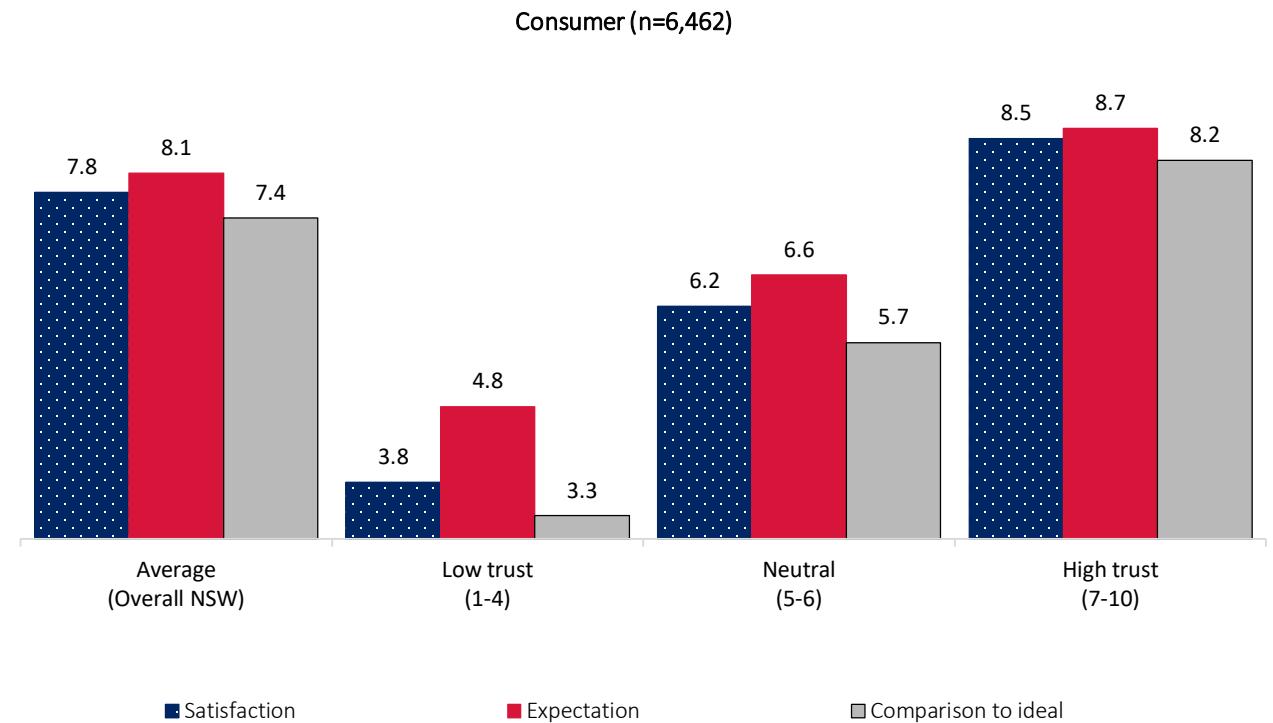


Figure 1.16: Comparison of trust to outcome measures - Consumer





Trust is determined by the consumer's belief that the government is acting in the best interest of its' citizens, and the hope that the government will do their best support you

Based on the qualitative data, trust in government services is influenced by:

1

Whether the government is perceived to act in the best interest of citizens:

- For consumers, trust in government services is defined by whether or not they believe that the government is acting in the best interest of its citizens.
- Consumers want to feel confident that the government is acting in their best interests rather than catering to what will deliver financial gain to the state.
- Political agendas and affiliation play an important role here, consumers who stated that they did not trust the government regularly cited major infrastructure projects and issues that are regularly discussed in the media.

*"Trust in Government Services means that the people of NSW believe that their Government is **acting in the public interest**, believing and trusting that the recommendations and actions of their Government are **consistent with achieving that Government's core values and outcomes**."*

2

Whether a service interaction meets or exceeds your expectations:

- When customers have an experience which exceeds their expectations trust is built, when an experience fails to meet expectations trust is eroded.
- For consumers, certain attributes of the experience are more important to trust than others. These are;
 - Competent staff who demonstrate care and empathy
 - Security of information
 - Transparency of process; and
 - Consistency of service and information.
- Consumer expectations of experiences are heavily influenced by past interactions and reputation of the government service in the media and governing political party.
- For example, many consumers report the negative reputation of public hospitals to have long wait times and be highly stressful. However, consumers who experienced a shorter wait time than expected, proactive communication from hospital staff or lack of duplicative steps reported that their trust with Public hospitals and overall NSW Government services had increased.

*"Trust in the NSW government services means to me, that any queries will be dealt with in a **timely manner**, according to laws that bind them. Also means that there would be **consistency when dealing with people in the same departments**. One centralised way of operating, with a lot of accountability."*

3

Whether the service adheres to government rules and regulations:

- Consumers mention that the foundations of trust in government services is built by the regulations and rules that govern the behaviour of employees and processes.
- Consumers have an expectation that employees are competent and behave in a way that abides by the laws when executing processes. This ensures consistency and reduces any potential risks which helps consumers perceive employees as more accountable.
- On the other hand, rules and regulations can leave consumers feeling a sense of distance between the government and their ability to have an opinion. Government processes are perceived to often follow strict guidelines and do not leave much room for public opinion or participation.

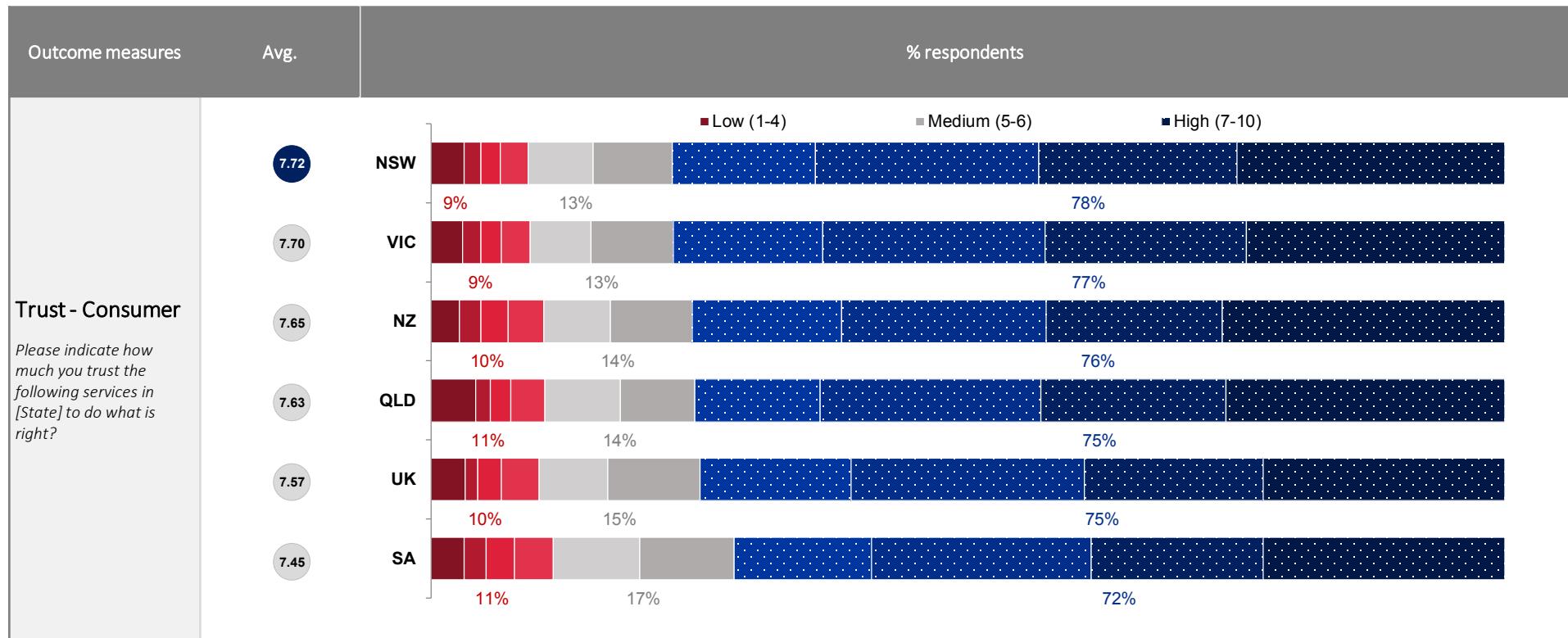
*"Being content to accept that there we have **very little control over the provision of services** (*and sometimes no choice*). Trust in the government means accepting that the services are being run properly and that the **outcomes will be favourable to us individually and as a community**."*



NSW Consumers rank first in trust with NSW government services across jurisdictions in 2019

Key Points

- NSW ranks first on trust among consumers in comparison to other jurisdictions. This result is supported by 78% of consumers rating their trust in NSW Government services as high (i.e. 7 to 10).
- In 2019, NSW consumers have the highest average rating of trust at 7.7/10 compared to other jurisdictions.



Note: Trust was added as an outcome in 2019



1. CSI & Outcome Measures

Business



Business CSI has remained stable in 2019 compared to 2018, but is above the baseline set in 2015

Key Points

- Business CSI has remained stable at 77.6/100 in 2019 from 78.2/100 in 2018. This result is below the 2015-2019 Premier's Priority Target of 81.16/100 but is above the baseline of 76.6/100 from 2015.
- The CSI has remained stable due to business expectations of NSW Government services, satisfaction and comparison to ideal scores all remaining stable in 2019 compared to 2018.

Figure 1.17: Customer Satisfaction Index – Business (out of 100)

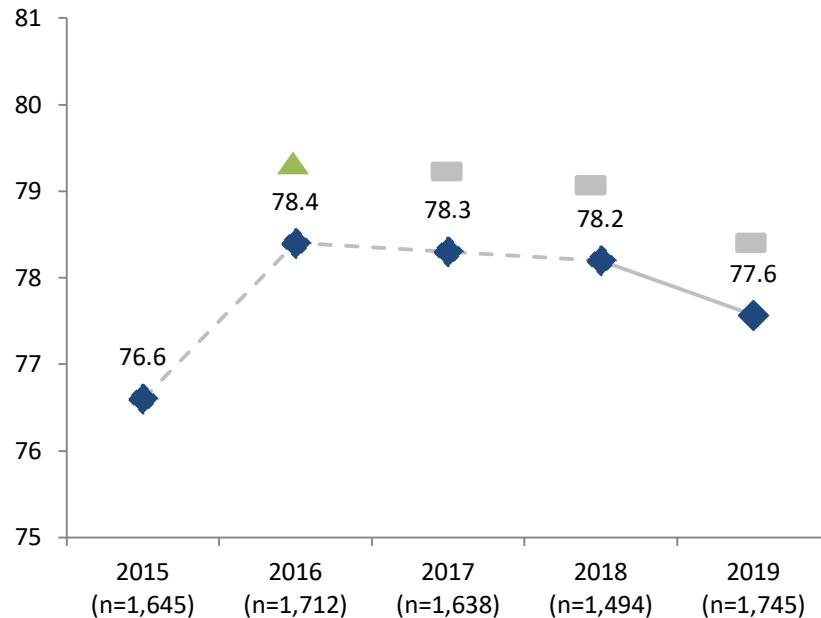
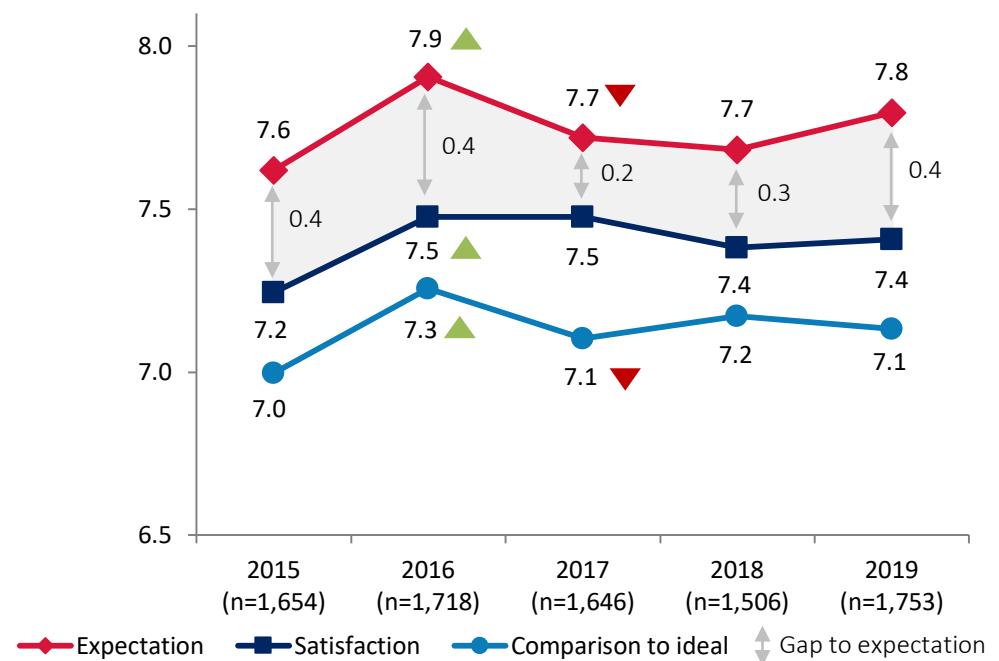


Figure 1.18: Top line performance – Business (out of 10)





Business CSI has remained stable from 2018 to 2019, which is reflected in Quarterly Pulse Check Survey results

Key Points

- The Business CSI remained stable from 2018 to 2019, following an initial increase in Q4 Quarterly Pulse Check Survey results (QPCS) and a steady downward trend in QPCS results from Q4 2019 to Q2 2019.
- Since 2015, expectations for business have been volatile but seem to have stabilized at a new normal of higher expectations of NSW Government services.

Figure 1.19: Customer Satisfaction Index - Business

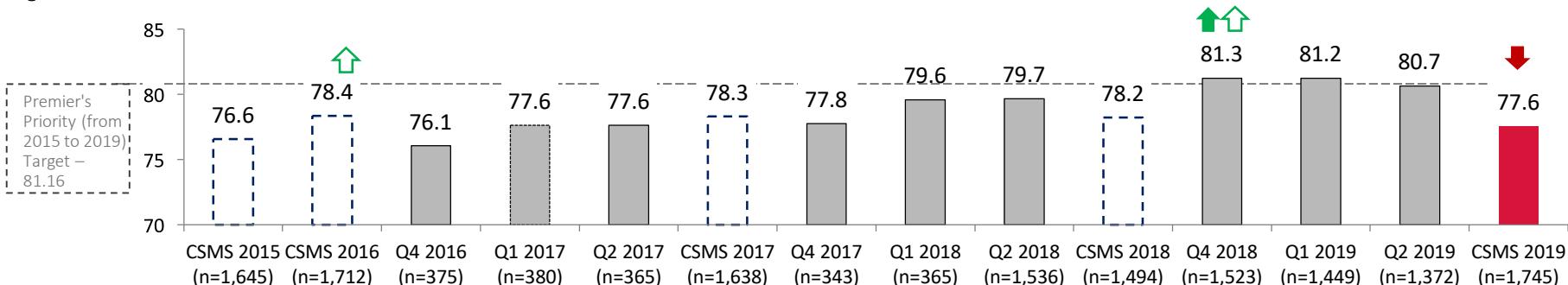


Figure 1.20: Top line performance - Business



⬆️⬇️ Statistically significant movement from previous quarter at 99% confidence level

⬆️⬇️ Statistically significant movement from same quarter previous year at 99% confidence level

No significant movement from previous quarter or same quarter previous year at 99% confidence level

No change in business CSI scores from 2018 to 2019 is consistent with the Roy Morgan Business Index

Key Points

- The Business CSI remains unchanged in 2019 compared to 2018, which is consistent with results in the Roy Morgan Index.
- Intra year results show that QPCS results remained high despite low confidence observed in the Roy Morgan Index in Q1 and Q2 2019.

Figure 1.21: Customer Satisfaction Index with Roy Morgan Index - Business

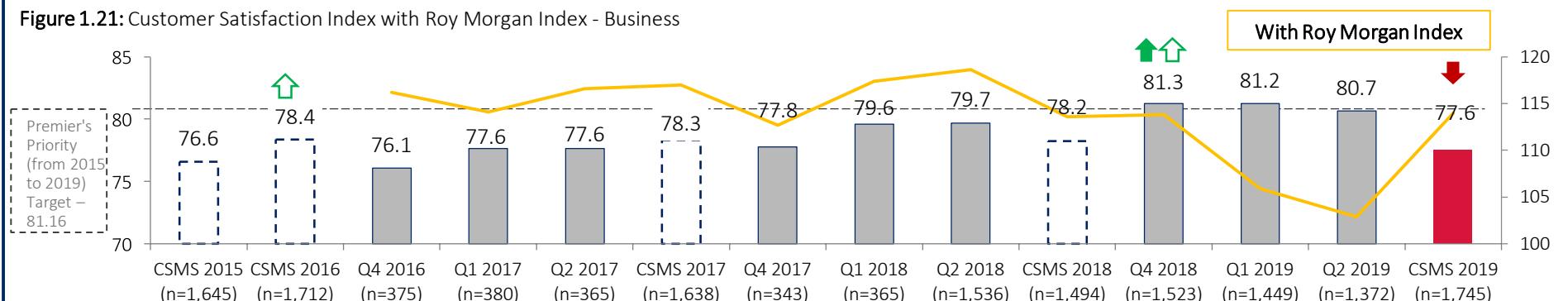
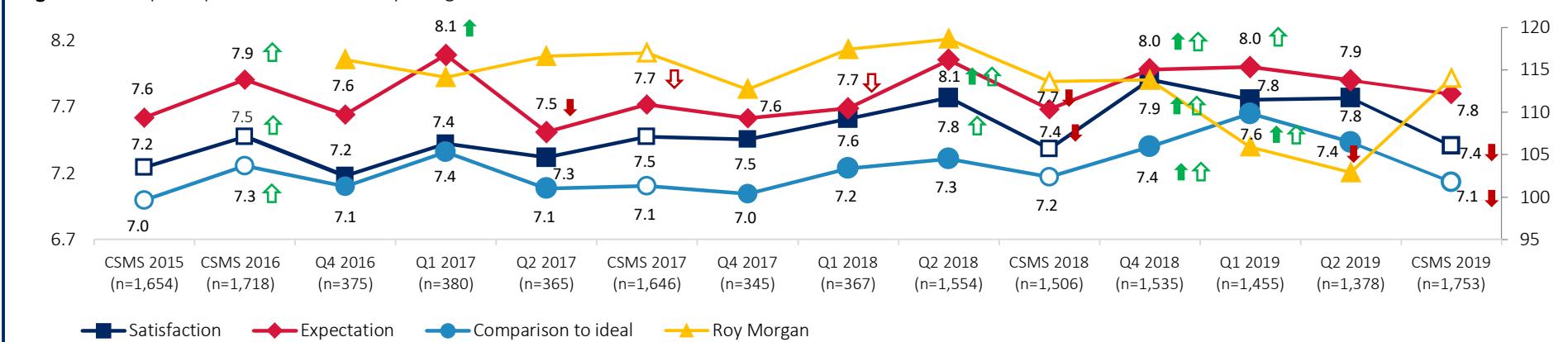


Figure 1.22: Top line performance with Roy Morgan Index - Business



↑↓ Statistically significant movement from previous quarter at 99% confidence level

↑↓ Statistically significant movement from same quarter previous year at 99% confidence level

No significant movement from previous quarter or same quarter previous year at 99% confidence level

Business CSI remained stable from 2018 to 2019, but more shielded from the quarterly fluctuations in the Sensis Index

Key Points

- Business satisfaction, expectation and comparison to ideal of NSW Government had no movement from the same quarter in 2018, consistent with the Sensis Index.
- However, business satisfaction and comparison to ideal had decreases from Q2 2019, which is reflected in the Sensis Index.

Figure 1.23: Customer Satisfaction Index with Sensis index- Business

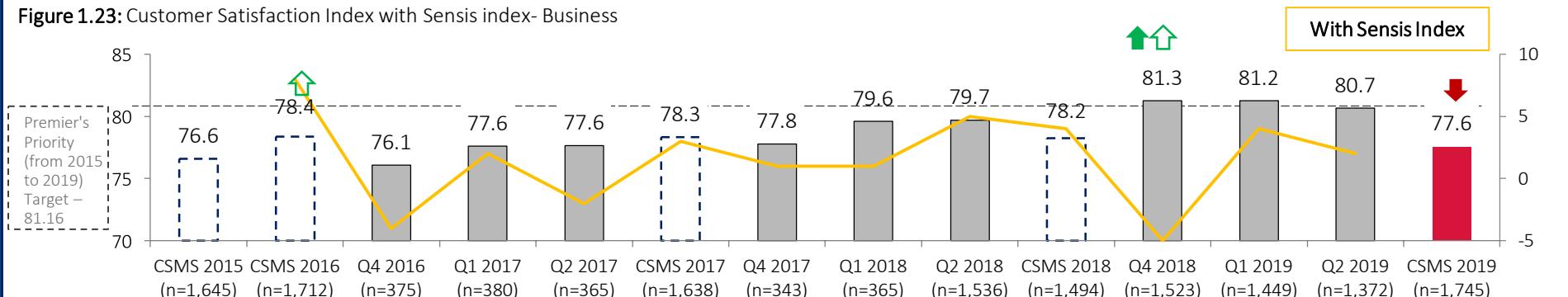
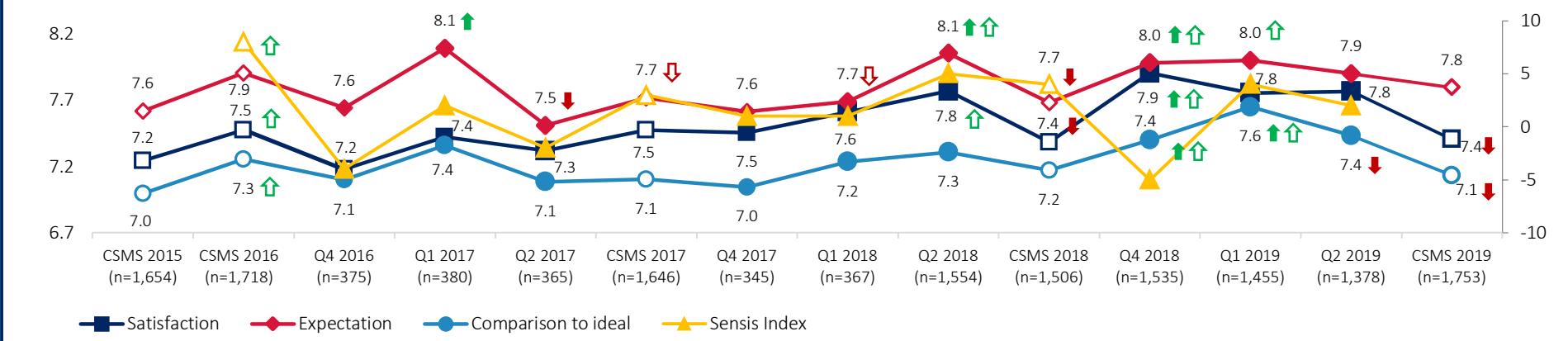


Figure 1.24: Top line performance with Sensis Index- Business



⬆️⬇️ Statistically significant movement from previous quarter at 99% confidence level

⬆️⬇️ Statistically significant movement from same quarter previous year at 99% confidence level

No significant movement from previous quarter or same quarter previous year at 99% confidence level



Businesses expect services to be tailored, information to be handled securely and treat them as a valued client

1

Businesses expect services to be tailored to their needs

- Businesses expect government services to be available to them at all times. This means being able to communicate with staff and complete processes outside of business hours.
- Staff are expected to understand the business situation and provide valuable suggestions to move the business forward or realise any potential risks.
- Processes are expected to be seamless and able to be completed both online and face to face, to give flexibility to meet business preferences.

2

Businesses expect government services to deal with sensitive documentation and data in a secure way

- Businesses tend to upload and provide documentation for verification which are at times confidential and sensitive.
- These documents often relate to consumer affairs and businesses expect the government to understand this and adhere to strict guidelines and regulations when handling such documentation throughout the process.
- Secure handling makes businesses more confident, making government services more reliable and accountable.

3

Businesses expect government services to treat them as a partner and valued client

- Businesses expect government services to help resolve business issues as if its their own and understand the consequences certain interactions will cause on the business (e.g. importance of being paid on time).
- Government services are expected to assist in implementing change to allow businesses to meet customer needs.
- This makes businesses feel more supported and confident in running the business, creating mutual respect between the two.

"When I engage with government services I expect the experience to be ...tailored to my needs, sometimes unable to communicate during business hours and am often time poor and find it hard to get these tasks done!"

*"When I engage with the NSW Courts service I expect efficiency, live chat, **high security in place**because it is storing **highly confidential information**about the Australian public."*

*"I would like to be treated as an **important customer**of the Government and that they are **an advocate**for our rights and our businesses. If they do this then it makes the rest of the paperwork easier to deal with."*

There is an opportunity to exceed Business' high expectations through personalised service delivery

Businesses have consistently high expectations of government services...

- Businesses expect to be treated like a valued client when interacting with NSW Government, meaning that they have very high expectations for how services should be delivered. This means that it is more difficult to exceed the expectations of Business.
- As soon as a new service is introduced businesses begin to think about how that service could be better or how it could be improved or how the process could be more efficient.
- Ideal experiences very quickly become the new norm for business because they expect the government to meet their high standards. When they have an experience that meets their expectations they re frame their expectations to be even higher.

*"The experience met my expectations which had been based on **using the online registration process in previous years** where it was efficient and professional. It **maintained the trust / had built over previous years** by doing the **same process and having the same professional experience.**"*

However, when these high expectations are met businesses are delighted...

There is an opportunity to delight businesses by **tailoring processes** to the specific needs of that business during an interaction.

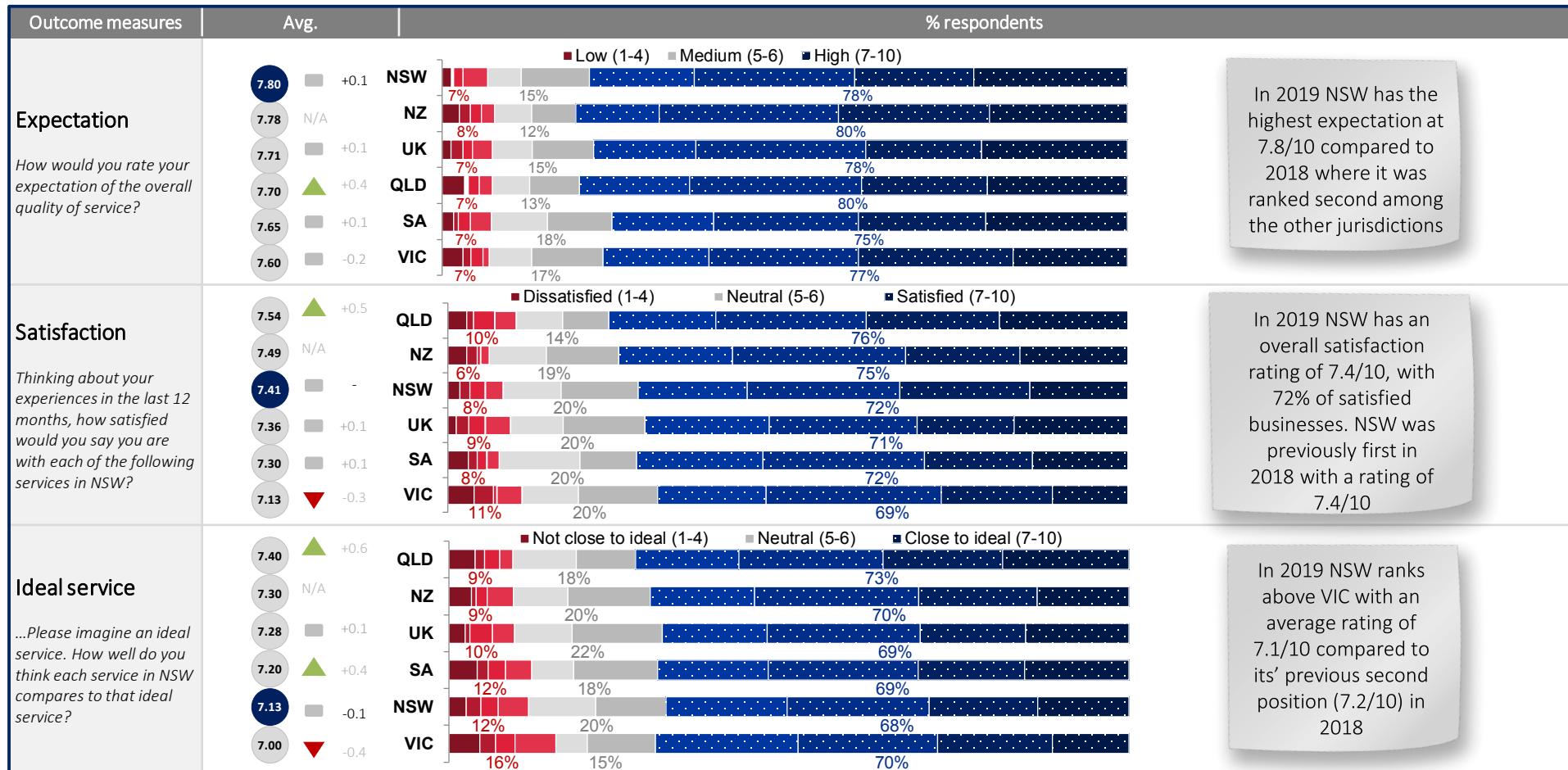
- A personalised experience helps businesses to feel like a valued client of the service.
- Businesses describe the valuable insight from knowledgeable staff informing them of upcoming risks, process updates or rebates they need to be aware of.
- These experiences exceed expectations because it allows business to feel uniquely cared for and gives them confidence in their interactions with the government overall.

*"Recently I had contacted water service for my business they were very active (and) quick. They quickly solved my water problem and gave me some **valuable suggestions** too. The kind of service was very good and **exceeded my expectations**. They are really **knowledgeable** and they know how to handle situation."*

NSW Businesses have the highest expectations of NSW Government services compared to other jurisdictions in 2019

Key Points

- NSW ranks first on expectation amongst businesses, demonstrating higher expectation of NSW Government services compared to other jurisdictions in 2019. Whilst ranking only above Victoria in comparison to ideal services for NSW Businesses in 2019.





Satisfaction has decreased amongst businesses in regional NSW in 2019 compared to 2018

Key Points:

- Regional businesses in NSW had a 0.5 decrease in satisfaction and expectation of Government services in 2019.
- Metropolitan businesses in NSW had a 0.2 increase in expectation of Government services in 2019.
- Consistent with 2018, businesses in wholesale trade and accommodation and food services had the lowest satisfaction and biggest gap to expectation respectively.

Figure 1.25: Business satisfaction by demographic cohorts

	Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)
Business Size	Sole Proprietor	6 – 9 employees	6 – 9 employees
	Rural	Metropolitan	Rural
Region	Arts and recreation services	Wholesale Trade	Accommodation and food services
	Up to \$50,000	\$500,001 to \$2,000,000	\$500,001 to \$2,000,000

Figure 1.26: 2019 Satisfaction and expectation by region and business size



Effort when interacting with NSW Government services has remained stable from 2018 to 2019

Key Points

- Overall effort remains unchanged in 2019 compared to 2019 (statistically insignificant change of 0.2/10).
- Reducing effort improves perceptions of interacting with NSW Government services - average satisfaction, expectation, comparison to ideal and trust scores are all higher for those businesses that rated effort as being lower.

Figure 1.27: Breakdown of effort by business

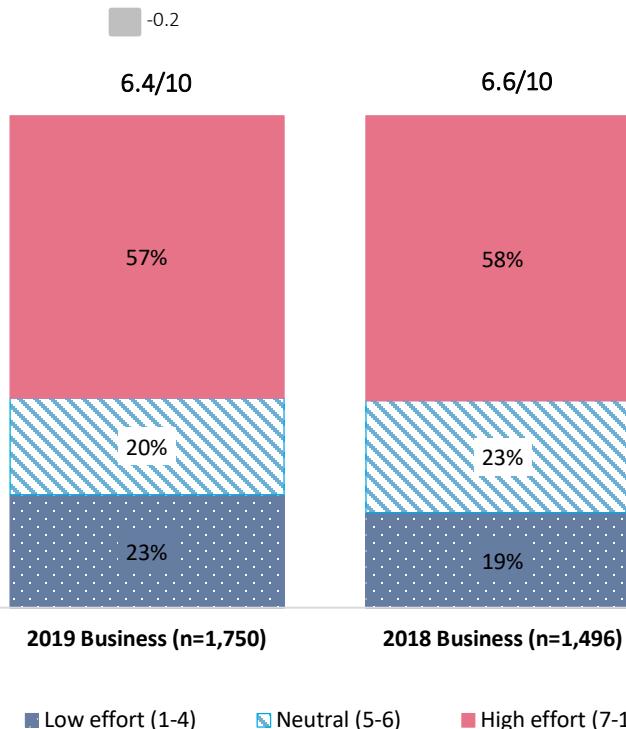
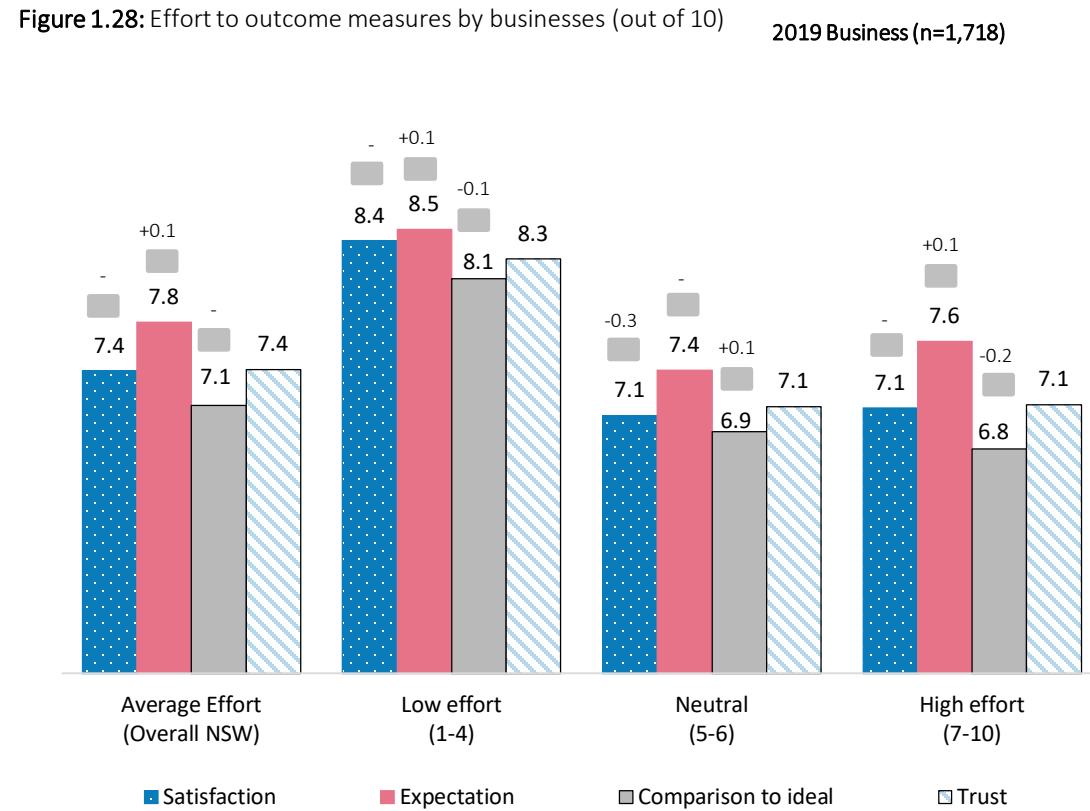


Figure 1.28: Effort to outcome measures by businesses (out of 10)



Statistically significant increase in avg. from previous year (at 99% level of Confidence)



No significant change in avg. from previous year (at 99% level of Confidence)



Statistically significant decrease in avg. from previous year (at 99% level of Confidence)



Having an online experience and professional staff helps ease effort for businesses when dealing with NSW Government services

High effort is experienced when...

1 There is a lack of proactive communication from government services.

- Businesses report services that lacked proactive status updates often caused potential risks to the business. Businesses are frustrated as they have to seek the information for themselves to resolve the issue or complete the process, causing them to spend more time and effort to achieve an effective outcome.
- For example, the lack of confirmation during a working with children check application could result in delays in business operation, causing them to spend unnecessary time away from the business and lose out on potential revenue and customers.

*"It is typically the **courts** that require a lot of work as there is a **lot of affidavit filing and information** that is required and they are very **pedantic about processes**. A lot of the time these need to be **handed in person rather than online** which further protracts the process."*

2 Interactions cannot be completed online.

- Businesses report that services where interactions have not been digitised, such as documentation services or courts, result in a lot more work and often do not meet expectations. These services require original documentation and paperwork to be handed in person in order to be verified.
- Businesses believe that these processes could be moved online to improve efficiency, allowing them to focus more time and effort on their businesses. This would make them feel like the government cares for their business and values their time.

*"Documentation Services (for me it was the Working With Children Check) required the most...effort on my part. I had to print an email and take it to a centre so both **online and physical effort was needed**."*

Meanwhile, businesses mention that services with lower effort had...

1 A central platform to store information.

- Businesses value online experiences more where there is an ability to store information in a central source and single point of access.
- Businesses mention that this helps them to reduce the amount of time and effort as their details are already pre-filled and previously provided information can already be accessed which removes duplicative steps. These experiences often made businesses feel more at ease, informed and confident in the process to be completed in a timely manner.

*"Car registration services requires the least amount of efforts to get the services done. It is because of the **online submission capability** of their website and comprehensive description of their services on their website."*

2 Adequate and professional staff to assist.

- Having adequate and competent staff can turn a high effort interaction into a positive and low effort interaction.
- Although businesses experience effort when interactions cannot be completed online, interactions via Service NSW have overcome this with staff understanding the business' situation and catering to their needs. Businesses experience less stress and when they believe staff have a genuine desire to help address their requests.

*"The new streamlined RMS requires very little effort by the customer as the **roving representative caters for any request** that hasn't been addressed via the **improved and responsive requirement specific e-ticketing**."*

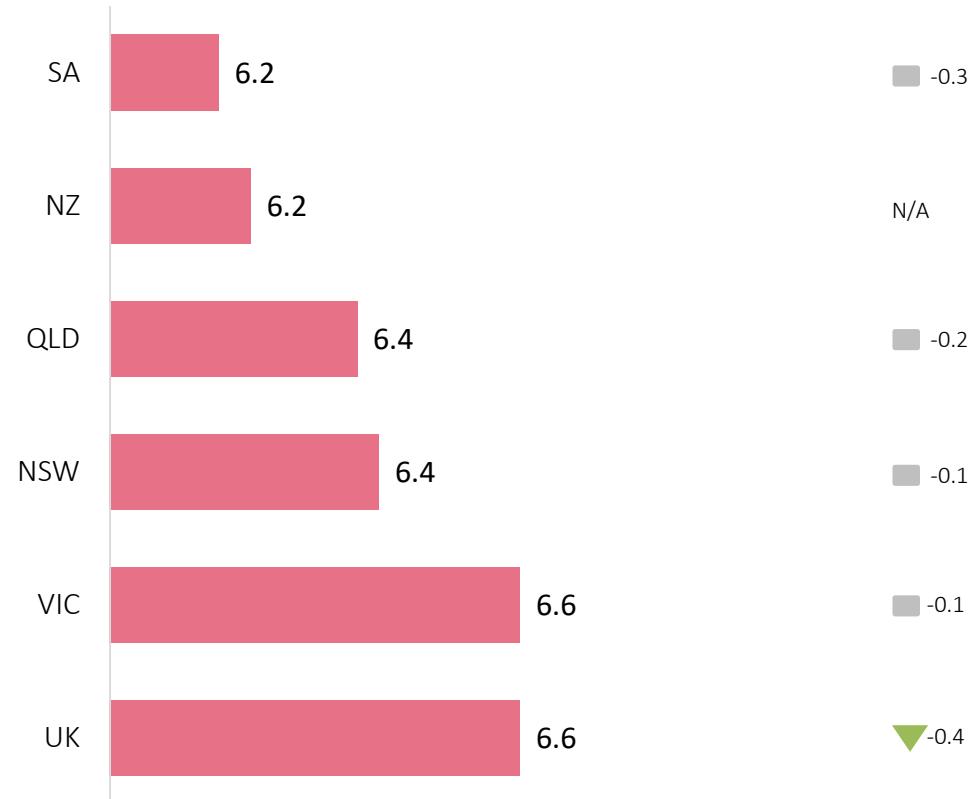


NSW ranks third in Customer Effort Score for businesses, compared to other jurisdictions

New South Wales is on par with Queensland and placed behind South Australia and New Zealand for business Customer Effort Score (CES).

For businesses, CES remained stable across all jurisdictions (no statistically significant change), with the exception of United Kingdom, which experienced a 0.4 decrease in effort since 2018.

Figure 1.29: Business CES by jurisdiction



Statistically significant increase in avg. from previous year (at 99% level of Confidence)



No significant change in avg. from previous year (at 99% level of Confidence)



Statistically significant decrease in avg. from previous year (at 99% level of Confidence)



The Business Customer Effort Score increased across multiple cohorts in 2019

Highest effort by demographic:

- Business Size: 6-9 employees
- Region: Metropolitan
- Industry: Electricity, gas, water and waste services
- Revenue: \$500,001 - \$2,000,000

"My office need(ed) renovation...submitted the plan to the centre manager...and the approval only come out in Jun 2019...council and rail corp...also need(ed) to approve the renovation plan. I ma(de) a lot of phone call but...cannot speed up the approving process...there is no change of the plan at all...just slow...approval."

- Metropolitan

Lowest effort by demographic:

- Business Size: Sole proprietor
- Region: Rural
- Industry: Mining
- Revenue: \$200,001 - \$500,000

"I have dealt with the NSW government for a start-up of a new business. This is a grant that the NSW government provide for a new start up...I went online...I find if the online experience has been set up correctly its usually easy to follow...if the right questions are asked then the experience can be quick and easy." - Sole Proprietor

Figure 1.30: Business CES by demographic cohorts

	Highest effort (within demographic category)	Lowest effort (within demographic category)	Increase in effort since 2017	Decrease in effort since 2017
Business Size	6-9	Sole proprietor	▲ Across all business sizes	nil
Region	Metropolitan	Rural	▲ Metropolitan, Regional	nil
Industry	Electricity, gas, water and waste services	Mining	▲ 15 / 18 industries	nil
Revenue	\$500,001 - \$2,000,000	\$200,001 - \$500,000	▲ Up to \$50,000, \$50,001 to \$200,000, \$500,001 to \$2,000,000, Over \$2,000,000	nil

Labels in green/red indicate highest satisfaction/lowest satisfaction within the respective demographic group

Legend:

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



Business effort is consistent with external business indices

Figure 1.31: Business Effort Score and Roy Morgan Index

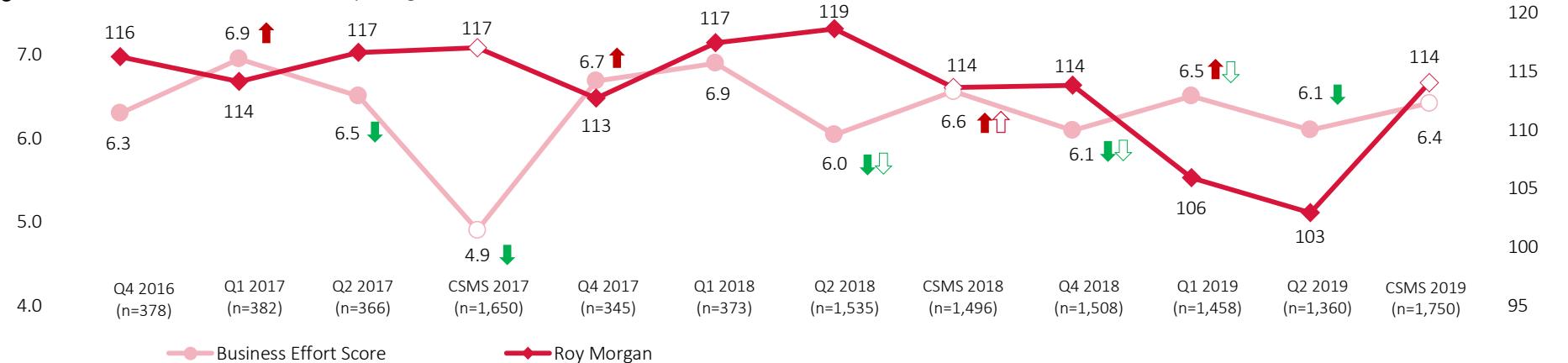
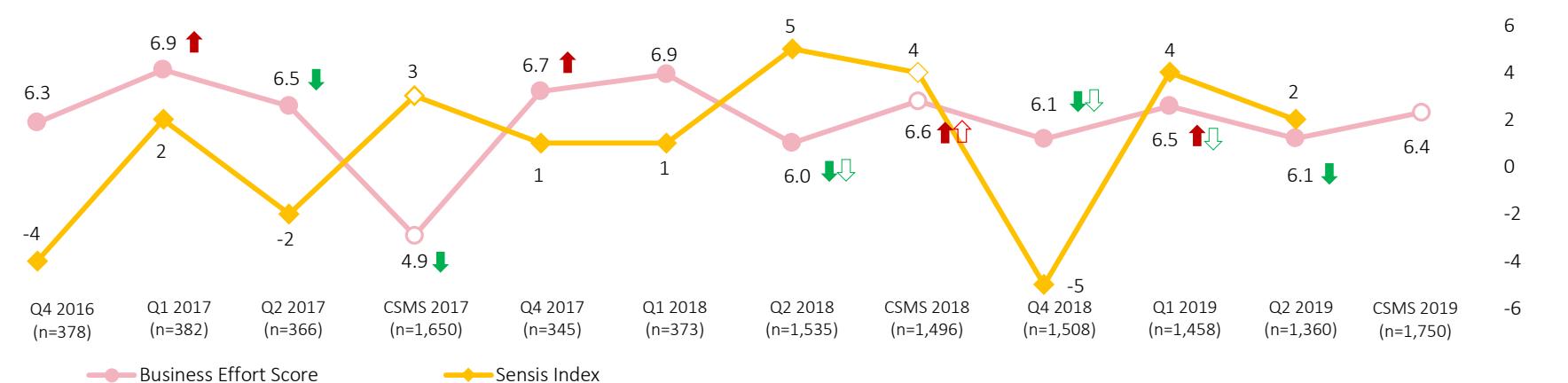


Figure 1.32: Business Effort Score and Sensis Index



⬆️⬇️ Statistically significant movement from previous quarter at 99% confidence level

⬆️⬇️ Statistically significant movement from same quarter previous year at 99% confidence level

No significant movement from previous quarter or same quarter previous year at 99% confidence level

NSW scores lowest on average across jurisdictions for ease of starting a business

Key Points

- Ease of starting a business receives low rates across all jurisdictions, below 6/10
- Comparing across jurisdictions, South Australia on average was rated the easiest to start doing business in 2019 at 5.8/10, whilst NSW is the lowest at 5.3/10 which is consistent with results in 2018.
- Within NSW, those starting businesses in metropolitan areas found it easier to start a business than those in than regional areas; this trend is consistent with 2018

Figure 1.33: Ease of starting a business across jurisdictions

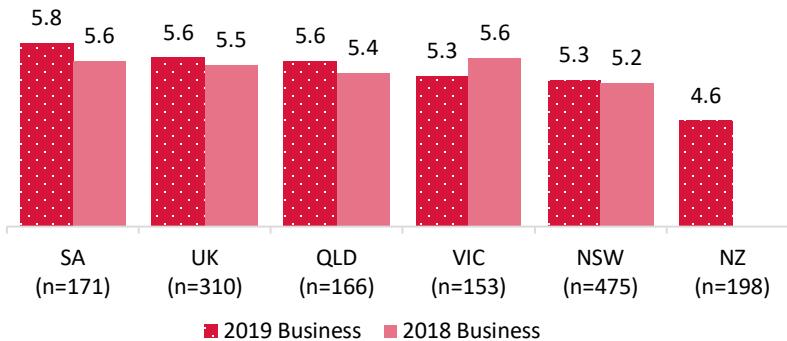


Figure 1.35: Ease of starting a business across Region (NSW Only)

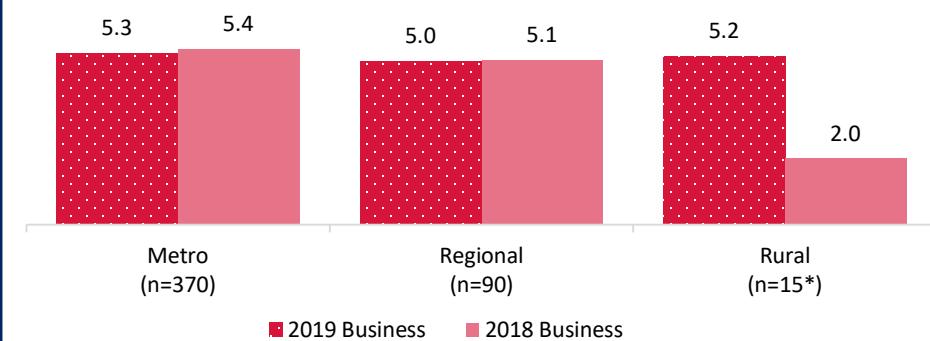


Figure 1.34: Ease of starting a business across business size (NSW Only)

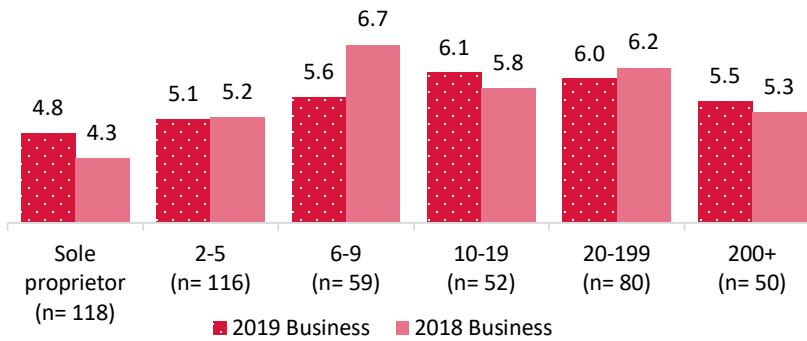
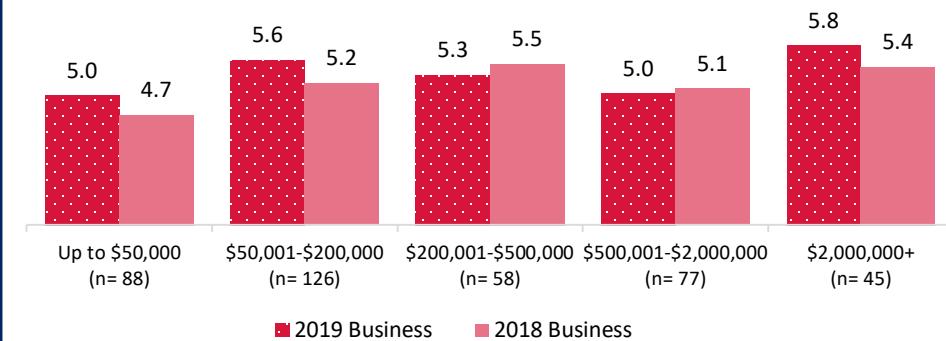


Figure 1.36: Ease of starting a business across business revenue (NSW Only)



Trust in NSW businesses is positively associated with outcome measures and brand perception

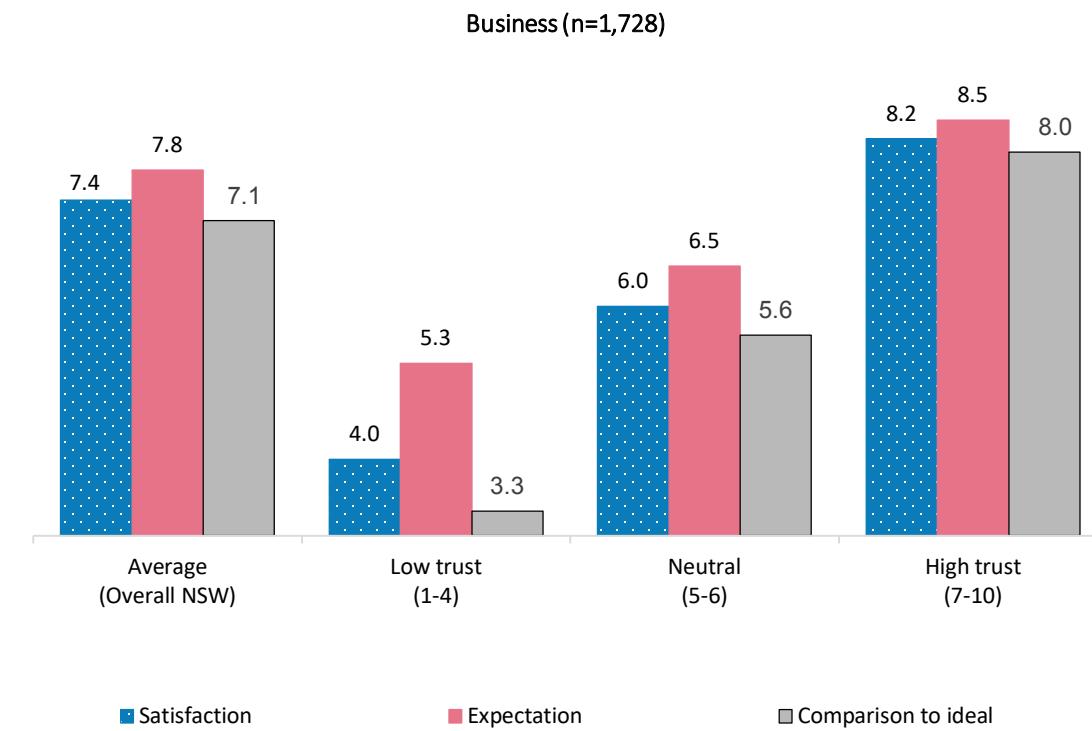
Key Points

- Trust is measured for the first time in 2019.
- Overall trust score for businesses 7.4/10 in 2019. 73% of businesses rated overall trust with NSW Government services as high.
- Higher trust is closely correlated with greater satisfaction and expectation with NSW Government services.

Figure 1.37: Breakdown of overall trust - Business



Figure 1.38: Comparison of trust to outcome measures - Business





Being supportive and adhering to government regulations are important to maintaining a high level of trust with businesses

Business trust is influenced by...

1 Adherence to government regulations and rules

- Similar to consumers, businesses mentioned that trust with government services is informed by the belief that staff behave and processes are designed in a way that follows strict guidelines and rules of the government.

2 Efficiency of processes

- Businesses have a strong focus on efficiency particularly when interacting with government services. For businesses if a process or an interaction takes longer than they feel it should it can have an impact on their revenue and erodes trust.

3 Security of information

- Documentation and information should adhere to regulatory agreements. This means that sensitive documentation is kept and handled in a secure way. Such behaviour allows businesses to feel that governments are more accountable and reliable, making businesses more happy to comply with the process, building their trust in the service and positively impacting their satisfaction with the service.

"To place trust in NSW government services is to know that any use...of the service will not lead to a detrimental effect on yourself or your business through incorrect or poor service delivery, poorly relayed information or breach of security through poorly handled data."

Trust is built when...

1 Businesses feel supported by government services

- With businesses expecting to be treated more like a partner and valued client to government services, many mention that they are more likely to have a higher level of trust when government services resolve issues relating to the business and treat the business as if its their own.
- Businesses report having a higher level of trust when they're treated as priority, meaning services are responsive and tailored to their needs and able to reach an effective outcome in a short time frame.

"Trust to me means that I know that if there are problems that arise in my business that need to be resolved, that my first point of call can be to the NSW Government services to assist me.

Previously this might not have been the case."

2 Existing expectations of processes are exceeded

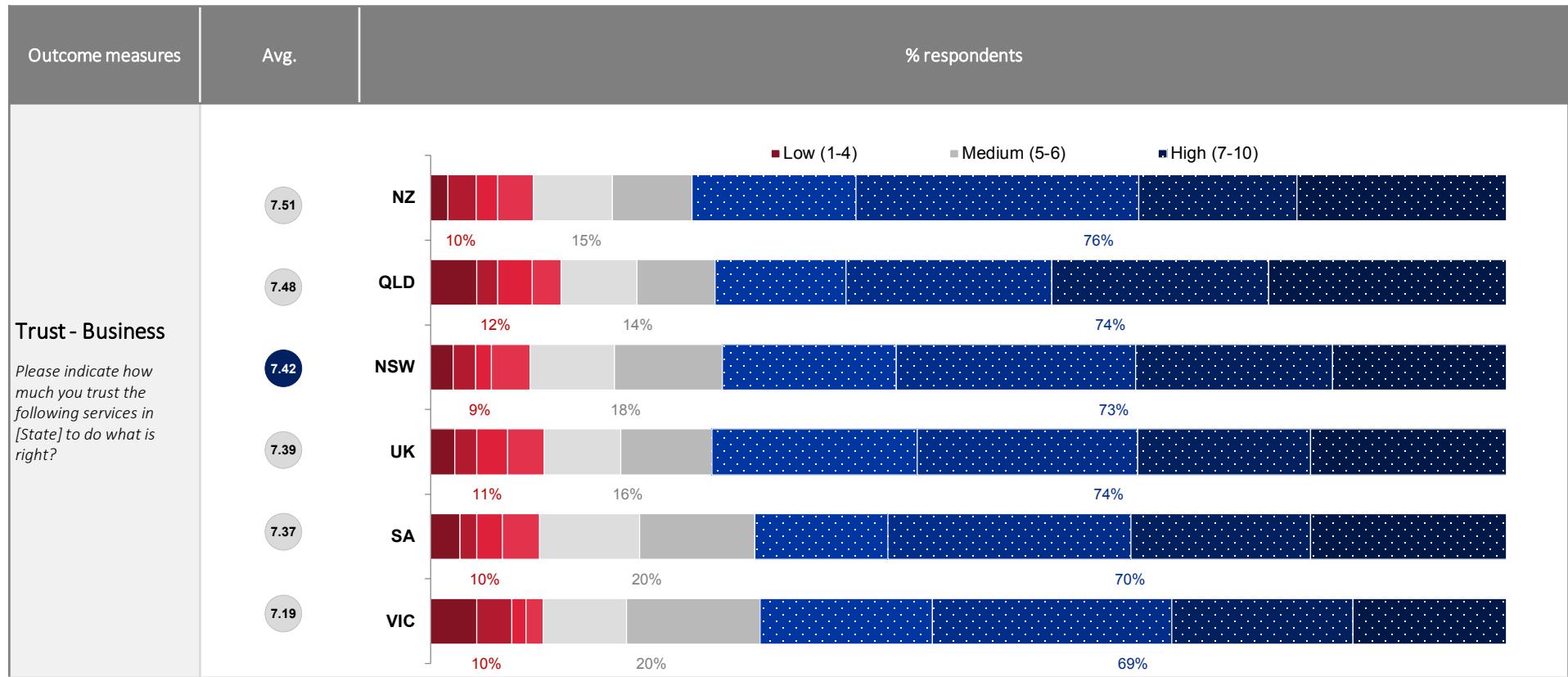
- When the expectations that businesses have of government are exceeded trust is built.
- This is challenging as businesses have increasingly high expectations of NSW government.
- When businesses have an experience that they feel demonstrates that the government cares about their businesses and can help them in a way that is tailored to their specific needs trust is likely to be built.

"My trust was built when... I received my renewal email ahead of time the links worked and sent me to the correct website... i was then sent a confirmation email. The process from start to finish was well connected, smooth and without interruptions."

NSW ranks third in trust across jurisdictions, behind New Zealand and Queensland in 2019

Key Points

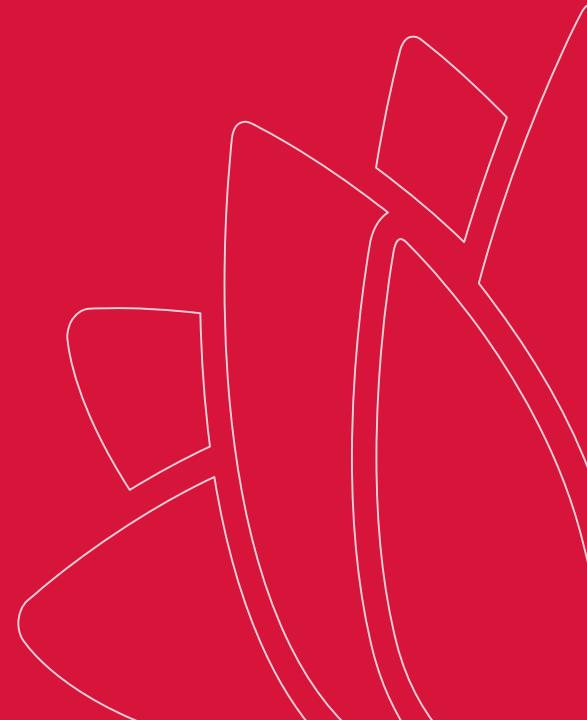
- NSW ranks third in trust among businesses, behind New Zealand and Queensland and above the United Kingdom, South Australia and Victoria.
- 76% of businesses in New Zealand reported high trust in government services, whilst only 73% of NSW businesses reported high trust in NSW Government services in 2019.



Note: Trust was added as an outcome in 2019

2. Drivers of Satisfaction & Service Attributes

Consumer



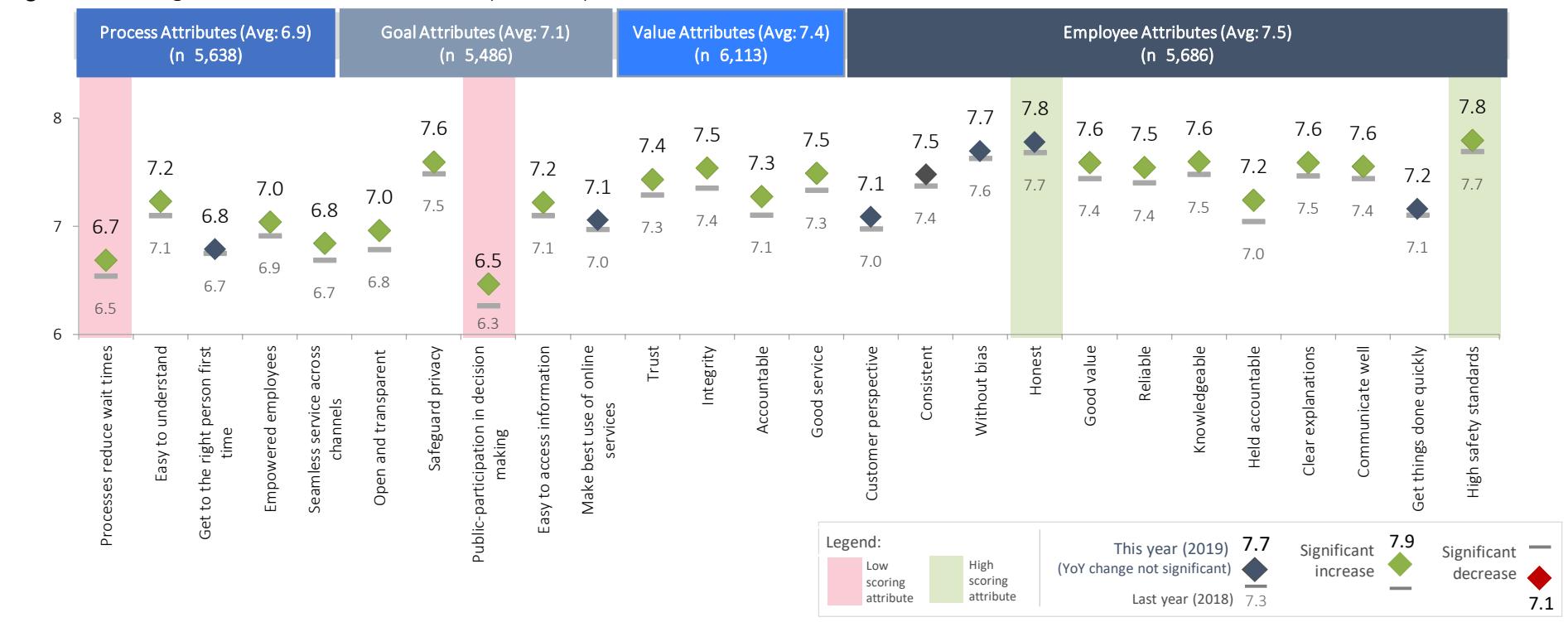


The average score for most consumer attributes has increased from 2018 to 2019, with employee related attributes scoring highest out of all four attribute areas and wait times and public participation scoring lowest

Key Points

- Consumer results show increases across average scores for process, employee, goal and value related attributes, with no declines experienced across any attributes.
- Consistent to prior years, employee related attributes remains the highest scoring attribute area at 7.5/10.
- Process related attributes remain the lowest scoring at 6.9/10, with ‘processes reduce wait times’ rated the lowest at 6.7/10.
- Under the employee attributes, ‘deliver high safety standards’ and ‘are honest’ are the highest scoring attributes at 7.8/10.
- ‘Encourage public participation in decision making’, a goals related attribute, remains the lowest scoring attribute at 6.5/10 consistent with 2018.

Figure 2.1: Average score of consumer attributes (out of 10)





Consumer 'wait time' experiences often occur due to lack of adequate staff, information and proactive communication

Consumer expectations of the 'wait time' experience

Consumers see two stages in the 'wait time' experience. Expectations prior and during the 'wait time' experience are different.

- **Prior to the 'wait time' experience:** Consumers want to feel prepared for the experience. This often means three key things:
 1. Receiving information that is accurate and relevant
 2. Being provided an explanation on reason behind the wait; and
 3. Being proactively communicated to.
- **The 'wait time' experience:** Consumers report three key expectations of the 'wait time' experience. There should be:
 - No unnecessary steps, to reduce time and effort
 - Proactive updates on the 'wait time' situation; and
 - Staff that are able to understand your circumstances.

*"The Service NSW castle Hill centre was **busy at the time**. Approximately 40 people in the centre. I took a number and i **could watch the board**as to how fast people are being served. i was **informed by the lady**at the front door what I was required to do and I **did not have any issue with the time I had to wait**and the process."*

Processes that reduce wait times score low as services often...

- 1 **Lack adequate staff:** Consumers are often left unattended and have growing frustrations over the lack of attention and service they are receiving. Often, this makes them feel alone, unimportant and confused over the process.
- 2 **Lack access to relevant, valuable and timely information:** Consumers are often left confused if relevant information is not communicated to them. Staff that understand the consumer's circumstance and are able to adapt the experience to the needs of the consumer are viewed positively.
- 3 **Lack transparency of the process and where they are up to:** Consumers are especially concerned and frustrated if they don't understand why they are waiting and how long the 'wait time' is. Consumers often assume that government staff and process are just lazy and that the outcome is less important.

Public Hospital: Consumers report that Public Hospitals have a negative reputation for 'wait time' experiences.

- Consumers find the booking process prior to the wait experience manual and inefficient.
- Making consumers already frustrated prior to visiting the hospital itself.
- Once there, the service is not able to provide consumers with an explanation of why they're waiting, no estimate for how long they will wait for. When this is communicated, staff aren't held accountable which leaves consumers waiting longer than expected.

*"When I listen the word "wait", the **service that comes in my mind is public hospitals**... I was having an appointment at 10 am, waited till 10:20 then asked at reception...I noticed four patients walked in and out in front of my eyes, **still I am waiting**. When I stood to complain, that moment **she started apologising** like sorry by mistake I placed you incorrectly in the list. As a result, I got **very late and even wasn't able to reach to work after lunch time**."*

Preparing, waiting and interacting make up the 3 stages of the 'wait time' experience

Preparing



- Before they have to wait customers want to have their expectations clearly set, this means:
 - Understanding which documents they are going to be asked to provide
 - A clear view of the channels which they will be interacting with
 - Specific timeframes and an understanding of how long they should expect to wait for

Waiting



- If in a physical environment customers prefer an initial acknowledgement by a friendly and informed staff member who explains the process to them
- If in a digital environment a notification that their interaction is being processed and visibility of the status is preferred (Businesses have a preference for an online experience which enables them to complete other tasks while waiting)
- If the expectations that were initially set cannot be met (e.g. surgeon is running late) customers want to be notified with notice and offered an explanation or an apology
- Sufficient staff available who are informed and able to answer questions and support customers
- Regular updates throughout the wait time process, these should be empathetic and acknowledge the time, effort and circumstances of the customer. A lack of empathy can lead to the customer feeling alone, unimportant and confused.

Interacting



- When customers are interacting after a wait experience they want to have the time effort and circumstances acknowledged
 - This is particularly true if the customer had to wait for longer than expected
- Many also want to understand why they had to wait, this prevents them from defaulting to a negative assumption

"Overall I was expecting a long wait and was prepared for this...It does help to know where you are situated in the queue to help with expectations."

"It might have helped if someone did come up and assured us that the lady would not keep us waiting for too long as we felt we had been forgotten as they all looked so busy with other clients."

"Prompt acknowledgement of receipt of application, being kept informed of the processes without me having to chase all the time and a resolution within a practical time frame."

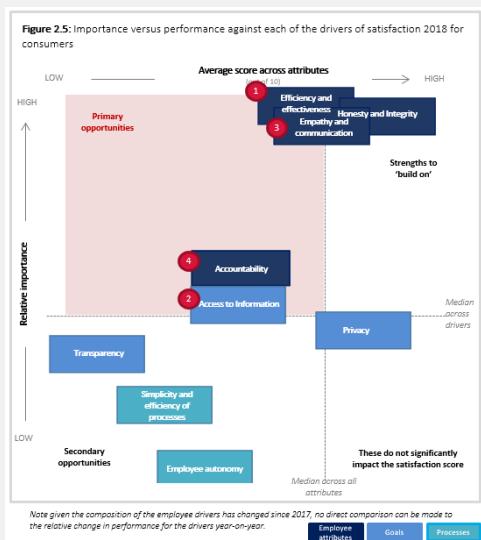
"I wanted clear information from staff and online as to what the delay was and what was being done to work around the problem."



'Efficiency and effectiveness' and 'access to information and online services' are identified as primary opportunity areas to increase satisfaction for consumers

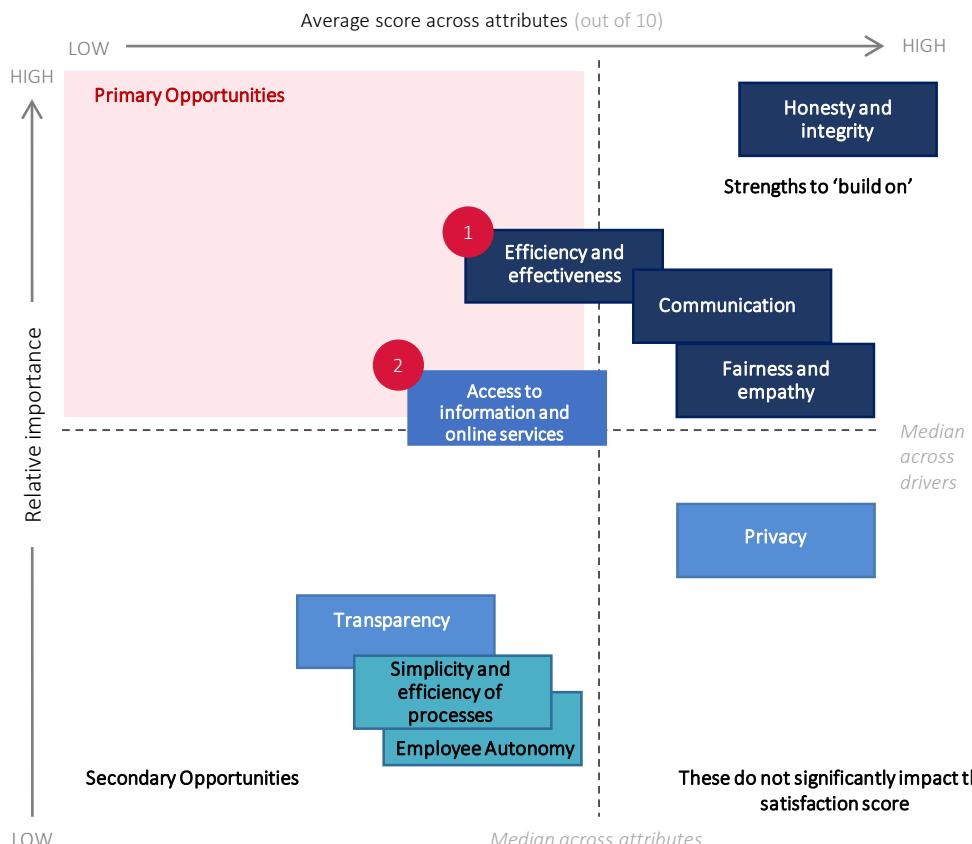
Key Points

- 'Efficiency and effectiveness' of employees continues to be identified as a priority area to drive the biggest increase in satisfaction with NSW Government services overall. This view is consistent with the findings from 2015, 2016, 2017 and 2018.
- A focus on 'efficiency and effectiveness' could also positively impact consumers' perceptions and experiences of wait times.
- Similarly, 'access to information and online services' remains a primary opportunity area in 2019 – attributes such as 'Is making it easier to access information about their services' and 'is making best use of online services to improve convenience and efficiency for consumers' remain priority focus areas this year.



- 'Fairness and empathy', 'communication' and 'honesty and integrity' continue to be strengths to build on as they are of high importance but are perceived to be performing well this year.

Figure 2.3: Importance versus performance against each of the drivers of satisfaction 2019 for consumers



Note given the composition of the employee drivers has changed since 2018, no direct comparison can be made to the relative change in performance for the drivers year-on-year

Staff efficiency and access to information are respectively influenced by empathetic staff and a seamless digital experience

Drivers of consumer satisfaction

1 Efficiency and effectiveness of employees is influenced by:

- Empathetic staff:** Empathy allows consumers to have a more humanised experience when interacting with government services. For instance, it can often make a bad 'wait' experience better due to acknowledgement of the consumer's situation and providing an explanation which allows them to feel supported, valued and confident in the interaction.
- Personalisation:** The greater the support, the more consumers feel at ease and find the service to be reliable. Such individualised attention helps to build an emotional connection, personalising the experience. This leads to exceeded expectations of the service, building trust and increasing satisfaction with NSW Government services overall.



- During face to face interactions, consumers who are unfamiliar with the e-ticketing system are proactively assisted by a dedicated staff member that is able to quickly understand their situation and place them in the queue.
- Such interactions help reduce wait times and help resolve any issues which could be redirected online or at an onsite computer, saving time and creating an unexpected moment of delight for the consumer.

*"My last face to face interaction with the NSW Service centre was with renewing my drivers licence. I was **pleasantly surprised at the efficiency** ...the staff member I dealt with was very **professional and pleasant to deal with** and we got through the service **very efficiently**. I found the...staff member...pleasant and engaged throughout the process."*

2 Access to information and online services is influenced by:

- A seamless digital experience:** Consumers report that it is not only the increasing digitisation of services that is influencing their positive sentiment but also how such digital experiences are integrated with current face to face experiences.
- Services which provide a seamless omni-channel experience are able to provide a more holistic and inclusive experience. Better access to information makes consumers feel more confident in the process and reduces their time and effort with the interaction.
- Integrated services which cater to multiple transactions such as Service NSW and Public Transport are often referenced by consumers as seamless experiences.



- Consumers report the public transport Opal card system easy to access. The experience is seamlessly integrated across face to face and online channels. The dedicated app helps to resolve any issues, transactional payments and proactively communicates necessary updates.
- Consumers feel at ease with the process and experience time savings by having all information from a single source, exceeding expectations and perceptions of the public transport system and increasing positive sentiment.

*"When I engage with any NSW Government service I expect it to be **as seamless as possible with correct information and easy to navigate systems**, because my **time is valuable**."*



2. Drivers of Satisfaction & Service Attributes

Business



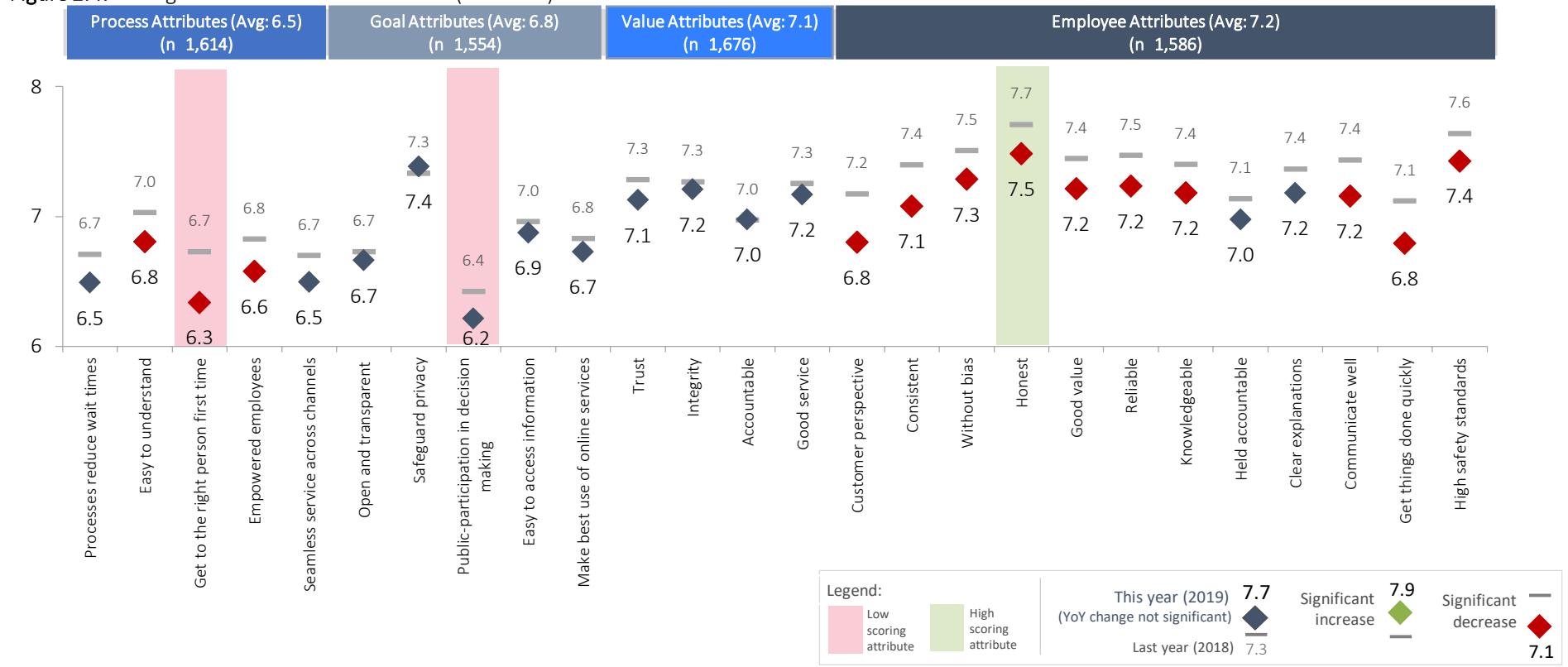


Most employee and process related attributes for businesses have decreased from 2018 to 2019; 'getting to the right person first time' and 'public participation in decision making' remain the lowest scoring attributes

Key Points

- Business scores have decreased from 2018 to 2019 for employee related attributes.
- Employee attributes remain on average the highest scoring at 7.2/10.
- Process attributes remains the lowest scoring on average at 6.5/10 in 2019, with 'get to the right person first time' the lowest scoring attribute at 6.3/10.
- Goal and value attributes remained consistent in 2019 compared to 2018.
- The goal related attribute of 'encourage public participation in decision making' remains the lowest scoring attribute in 2019, consistent with 2018.

Figure 2.4: Average score of business attributes (out of 10)





Businesses expect the ‘wait time’ experience to be fast, transparent and have all information easily accessible

1

Business expectations of the ‘wait time’ experience

Businesses are more focused than consumers on interactions being timely and efficient. Hence, processes that are timely and include a ‘wait time’ experience often frustrate businesses, especially when it is unexpected. Managing business expectations is therefore critical, these include:

1. Being transparent and provided with a realistic and reasonable timeframe of how long they have to wait
2. Being provided with notice as early as possible; and
3. Having staff that understand the consequences of the ‘wait time’ experience on the business.

For businesses, it is optimal to not wait at all, this often means that businesses:

- Find the experience of going in store frustrating as this is taking time away from their work and costing them money;
- Do not feel like a valued client or given priority when the process feels inefficient.

2

Businesses find it difficult to ‘get the right information first time’

- **Relevant information is difficult to access:** For businesses, it is important to have information that is not generic and relevant to their needs, provided to them as fast as possible. Any challenges and delays in finding such information makes them feel like they are wasting time and find it frustrating.
- **Certain processes cannot be completed on a single channel:** Businesses report a preference for the online channel as it is more timely and efficient. When they have to use more than one channel particularly when that channel is face to face they become frustrated. Some can’t identify a clear reason why the process would need to be completed offline (e.g. verification of business documentation).
- **Information is inconsistent across channels:** This is especially true for processes with a higher consequence to the business and when information cannot be verified, it causes them to seek other channels to confirm the information in order to complete the process. This incurs travel time and businesses having to wait in a queue to be served.

“I wasted my time and lost customers at my business, because I have to shut down my business premises to get the service from NSW service centre.”

“It was somewhat frustrating, I expect that a more efficient system could be implemented which would reduce the amount of time wasted.”

Consumer and businesses feel frustrated when they are required to repeat themselves but often understand why it is necessary

Services which require customers to interact with a number of people or systems are prone to repetition

- Consumers and business have to repeat themselves mostly when filling out forms to provide information (e.g. verifying identity).
- Services which engage with more systems, require the exchanging of details and identity verification have higher occurrence of consumers and businesses repeating themselves.

Consumers and businesses can be reassured by the process, when they can't see a clear reason they become frustrated

- Overall sentiment is that repetition is frustrating but necessary at times, customers understand that in order to ensure the security of their information they will have to repeat themselves occasionally.
- This can even help build trust in NSW Government services as customers can see evidence that the necessary precautions are being taken.
- When services are expected to have the necessary data already or a customers matter is being moved from person to person customers can't see a clear reason as to why they need to repeat information and become frustrated. This causes customers, to feel that their time has been wasted.

The following services were associated with repetition:

- **Public Hospital:** Various systems and information is exchanging to and from a number different places
- **Police Services:** Verification of identity and documentation
- **Documentation Services:** This is improving especially with the movement of process to digital and online, as there is a single source of information and details are pre-filled
More convenience and data security

*"Sometimes you have to repeat yourself when **filling out Government forms**, but I have often understood that this is necessary in **verifying your identity**. I see it is **necessary**, however, when the **introduction of central portals** for services such as Service NSW, this has become **minimised**."*

*"I think documentation services is the one you have to repeat yourself the most because it feels like there are **several different forms** you have to complete, but they are all asking very **similar things**."*

*"Public Hospitals - there always seems to be **so much going on with your records** and files and so many **different people** with access to them that people find it **hard to keep track** of you as a person in the system. You have to **repeatedly explain yourself**, your circumstances and your details each time you speak with someone new in a hospital."*

*"Quite often I need to **repeat myself** and **provide the same information to numerous sources**, especially if an enquiry is being **bounced around**."*

*"Public hospitals, Police, education, water supply and documentation services are some of the departments of NSW Government where I have to **repeat myself every time**, either to **fill in the forms** or as a **mode of verification** of my identity."*



'Efficiency and effectiveness', 'honesty and integrity' and 'access to information' are identified as primary opportunity areas to increase satisfaction for businesses

Key Points

- The three primary opportunity areas for businesses are (1) 'Efficiency and Effectiveness', (2) 'honesty and integrity' and (3) 'access to information and online services'. These three drivers have high relative importance and low relative performance.
- 'Access to information and online services' has been a consistent primary opportunity compared to 2018.
- 'Honesty and integrity' and 'efficiency and effectiveness' are new primary opportunities in 2019. These results reflect the increased importance of employee attributes to businesses.
- 'Simplicity and efficiency of processes' has moved from a primary opportunity to being a secondary opportunity in 2019.

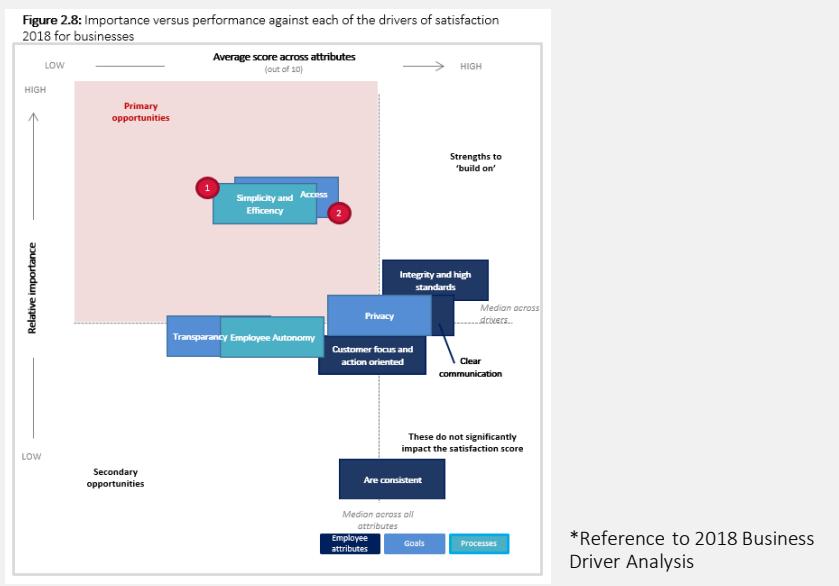
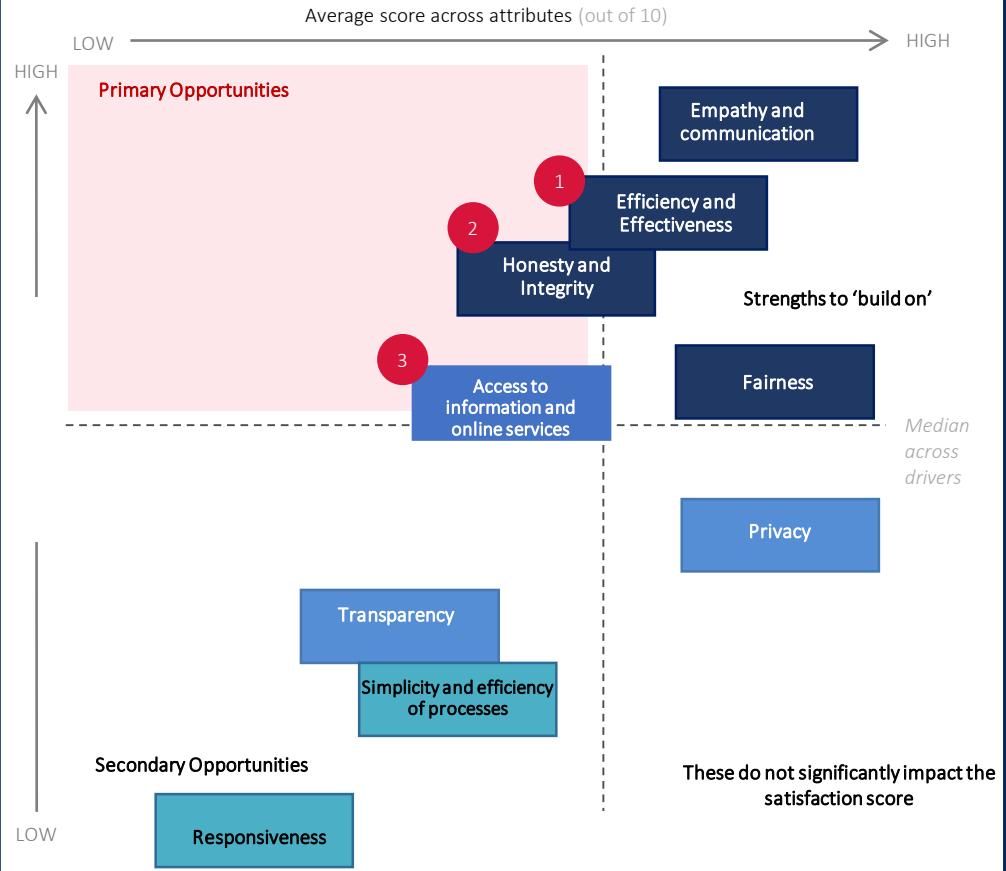


Figure 2.6: Importance versus performance against each of the drivers of satisfaction 2019 for businesses



Note given the composition of the employee drivers has changed since 2018, no direct comparison can be made to the relative change in performance for the drivers year-on-year



Knowledgeable staff, accurate information and continued digitisation influences business satisfaction with NSW government services

Drivers of business satisfaction

1

Efficiency and effectiveness of employees:

Compared to consumers, businesses prefer government staff who are able to provide a consistent, reliable and efficient service which is able to address urgency and provide a timely resolution.

- Businesses expect staff to be knowledgeable in the service they are providing.
- However, businesses report that their expectations are exceeded and satisfaction increases when staff are able to challenge the expectations of the service.
- This can be either by showing a level of personalisation during the interaction or providing valuable suggestions which help steer the business forward and make businesses feel like they are a valued client and partner of the government service.

2

Honesty and integrity influences satisfaction through:

Expectations of businesses are exceeded when staff and processes provide accurate, verifiable and consistent information across channels.

- **Accurate information:** Interactions between businesses and government can often have a significant consequences for the business itself. Being able to have the accurate information at each step of the process is critical to ensure that all risks are mitigated and an effective outcome is reached.
- **Secure and safe handling of sensitive information:** Businesses often provide sensitive documentation about the business itself or their customers which need to be handled securely.
- **Accountability of staff:** Staff that consistently deliver and exceed on promises are better able to build rapport with businesses, engendering trust and allowing businesses to perceive NSW Government services as a trustworthy organisation

3

Access to information and online services:

Businesses are increasingly placing more emphasis and value on the online experience. Businesses see the online experience as a process that minimises their efforts.

- Businesses are time-poor and increasingly looking for instant gratification.
- The online experience removes unnecessary steps within a process and potential delays with staff dealings.
- It helps them achieve their objectives faster, increasing their expectations of NSW Government services.

"My positive experiences would have to be recently attending the RMS. Very efficient service and how knowledgeable staff were. This experience gave me more trust in the government services."

"That my transactions will be convenient and completed quickly and accurately. That my private information and data will be securely handled and my privacy protected."

"It's about not having to click through a lot of information to find the accurate information I need at the right time."



3. Contact Method



Face to face continues to be the most preferred contact method, followed by online for consumers and email for businesses

Key Points

- Consumers and businesses are most likely to interact face to face with NSW Government services in 2019, consistent with 2018.
- Usage is in line with preference; face to face still remains the most preferred contact method for consumers and businesses, with preference remaining stable year-on-year.

Figure 3.1: Contact method used - Consumer

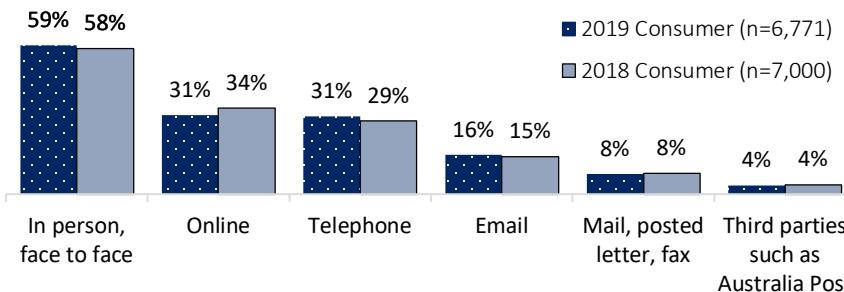


Figure 3.3: Most preferred contact method – Consumer

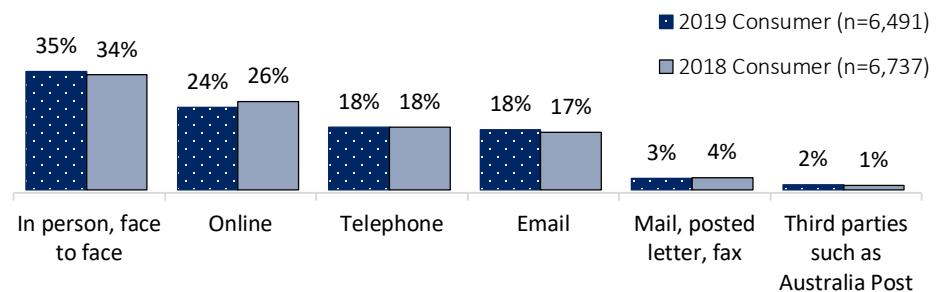


Figure 3.2: Contact method used - Business

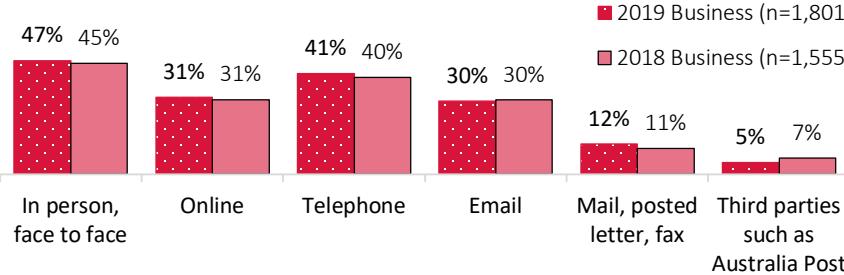
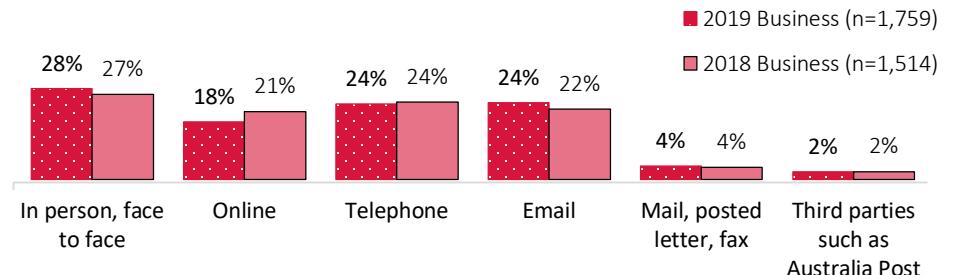


Figure 3.4: Most preferred contact method – Business



In person, face to face is most preferred by consumers aged 65+ and rural businesses in 2019

For consumers, face to face interactions is most preferred by:

- Age: 65+ years old
- Region: Rural
- Employment status: Retired
- Gender: Female
- Income: \$30,001 - \$50,000

"I use phone and face to face services with Services NSW unless it is a straight forward job like paying motor reg. The customer service agents are polite and friendly. Online is ok but sometimes you have to dig through layers to get what you want." - 65+ year old

For businesses, face to face interactions is most preferred by:

- Business Size: Sole proprietor
- Region: Rural
- Industry: Administrative & support services
- Revenue: Up to \$50,000

Figure 3.9: Consumer with in person preferences by demographic cohort

	Highest preference (within demographic category)	Lowest preference (within demographic category)	Increase in preference since 2018	Decrease in preference since 2018
Age	65+ years (43%)	18-24 years (28%)	55-64 years (5%)	35-44 years (5%)
Region	Rural (52%)	Metropolitan (31%)	Rural (13%)	Metropolitan (0%)
Employment status	Retired (41%)	On maternity/paternity leave (27%)	Self employed/business owner (6%)	On maternity/paternity leave (10%)
Gender	Female (35%)	Male (34%)	Male (1%)	nil
Income	\$30,001 - \$50,000 (41%)	Over \$180,000 (27%)	\$30,001 - \$50,000 (4%)	Up to \$30,000 (2%)

Figure 3.10: Business with in person preferences by demographic cohort

	Highest preference (within demographic category)	Lowest preference (within demographic category)	Increase in preference since 2018	Decrease in preference since 2018
Business Size	Sole proprietor (35%)	20-199 (21%)	Sole proprietor (7%)	20-199 (7%)
Region	Rural (41%)	Metropolitan (25%)	Regional (7%)	nil
Industry	Administrative & support services (42%)	Public administration and safety (2%)	Administrative & support services (26%)	Public administration and safety (36%)
Revenue	Up to \$50,000 (37%)	Over \$200,000 (18%)	Up to \$50,000 (7%)	Over \$200,000 (17%)

Labels in green/red indicate highest satisfaction/lowest satisfaction within the respective demographic group

Online interactions continue to be higher satisfaction and lower effort compared to other contact methods

Key Points

- Satisfaction and expectations scores are highest for consumers and businesses that use online as their primary channel, followed by face to face.
- For consumers and businesses, effort is lowest for those who interacted with NSW Government services online.
- Outcome measures for face to face and telephone interactions has increased from 2018 to 2019.

Figure 3.5: Satisfaction and expectation by contact method used (out of 10) – Consumer

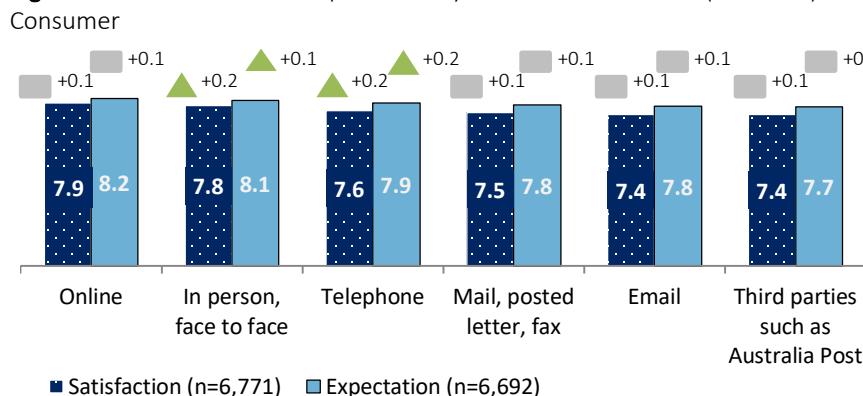


Figure 3.6: Satisfaction and expectation by contact method used (out of 10) – Business

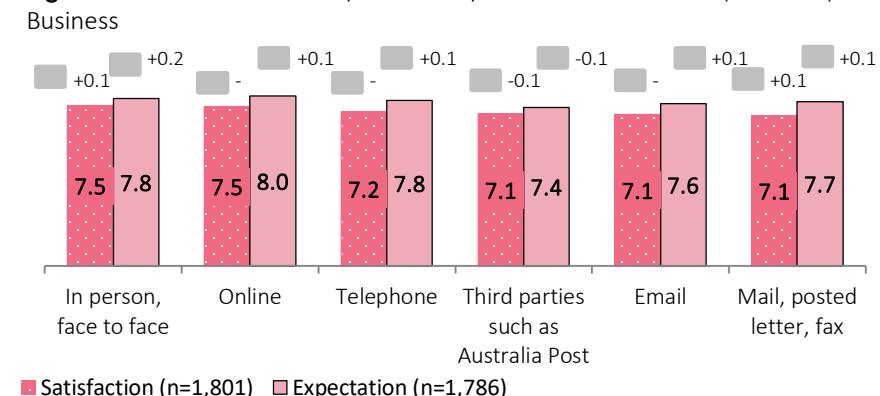


Figure 3.7: Average effort put forth by the contact method (out of 10) - Consumer

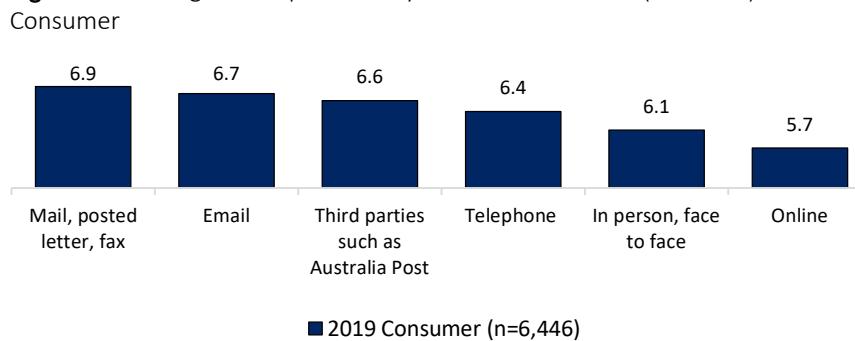
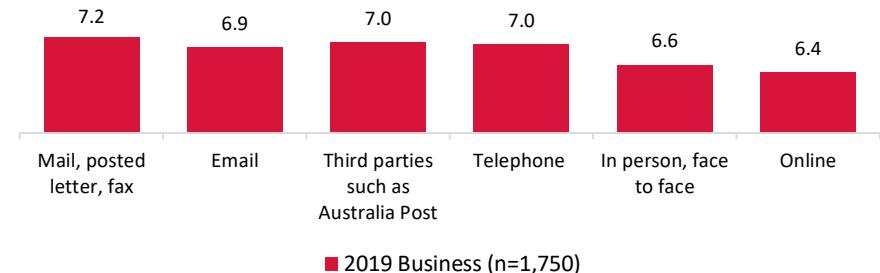


Figure 3.8: Average effort put forth by the contact method (out of 10) - Business



Legend:

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

Engaging with the online experience requires less effort as less physical documentation and more flexibility is provided

Consumers and businesses experience lower effort with online experiences as it...

1 Provides a single source of truth:

- All information can be kept in a central source, making it easily accessible, saving time and effort to look for information.
- This provides an avenue for consumers and businesses to manage their expectations of the interaction as all the necessary information and steps of the process are provided through the online channel.

2 Able to resolve issues promptly:

- Consumers and businesses are able to get live feedback on any issues and barriers to achieving an outcome. Providing more flexibility and timeliness than going face to face.
- For businesses, the option of a live chat function and feedback channel allows them to resolve issues in a timely manner, reducing the potential negative impact on the business and increasing the likelihood of achieving an effective outcome.

3 No requirement for physical documentation:

- Fewer issues with duplicative steps as information is often pre-filled and issues with forgetting documentation or not bringing sufficient documentation is easily resolved, saving time and effort to manually fill out paperwork and visit the face to face service centres, potentially multiple times.

4 More control and empowerment over the process:

- The online experience provides more flexibility to consumers and businesses during the process. It allows them to complete it anywhere and anytime, whenever it is most convenient for them. This reduces the barrier to engage with government services and increases the likelihood of them completing the process in the first place.

"Finding the information or completing a task easily with minimum effort makes the online experience great. Also being able to complete it at my convenience is wonderful."

"I felt the online experience was easy and uncomplicated, there was also an online chat person to help if needed. It was efficient and not time consuming. Compared to one to one interactions where I had to wait at least an hour to do a simple task of registering my vehicle the overall experience was pleasant and positive."

"Convenience. I can do things online whenever and wherever I want to: at home, at work, in a park! In the morning, late night, after / before shops open and close! Easy!"

"I have found Public Transport excellent usually either online or telephone contact or even face to face. This reasoning is based on the fact that I have always received a speedy, accurate and satisfactory outcome in my interactions. Additionally responses have been friendly and with a genuine desire to help."

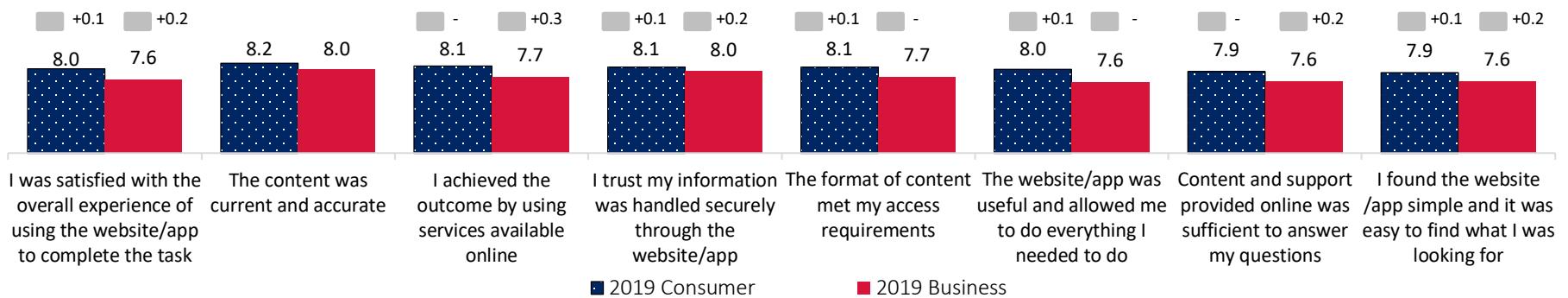
"I expected it to be efficient as easy to access the information as they would have made changes previously if it wasn't. It really met my expectations and it makes searching for information easy."

Current and accurate content and being able to achieve the intended outcome are key drivers of online usage

Key Points

- Current and accurate content was the highest scoring online attribute at 8.2/10, for consumers. Whilst businesses, also rated having secure handling of information as the highest scoring attribute at 8.0/10 equal with current and accurate content.
- Online attribute results for 2019 are consistent with 2018.

Figure 5.5: Drivers of online usage



Consumers and businesses go online because...

- 1 **Speed and efficiency.** The online experience saves time by alleviating travel time and 'wait time' experiences such as waiting in queue.
- 2 **Need to complete a transactional process.** Consumers and businesses often undertake more transactional processes such as payments and confirmations via online. Complex interactions which involve more questions.
- 3 **Flexibility and ease.** The online experience can be completed outside of business hours, in the comfort of the home, and enable multiple processes, to be completed simultaneously and accept multiple payment methods. All this factors into the online experience's ability to be easy and tailored to needs.
- 4 **Poor perception of face to face interactions.** Perceptions of long waits, lack of adequate staffing and trust with face to face result in many consumers and businesses having negative perceptions and having to rely on the online experience to achieve an outcome.

"Clear layout, headings and reduced visual busy-ness makes it very **userfriendly**...**easy to understand**...great **selfdriven process** to receive information! Also works really well on mobile which caters to people attempting to **findinformation on the go**."

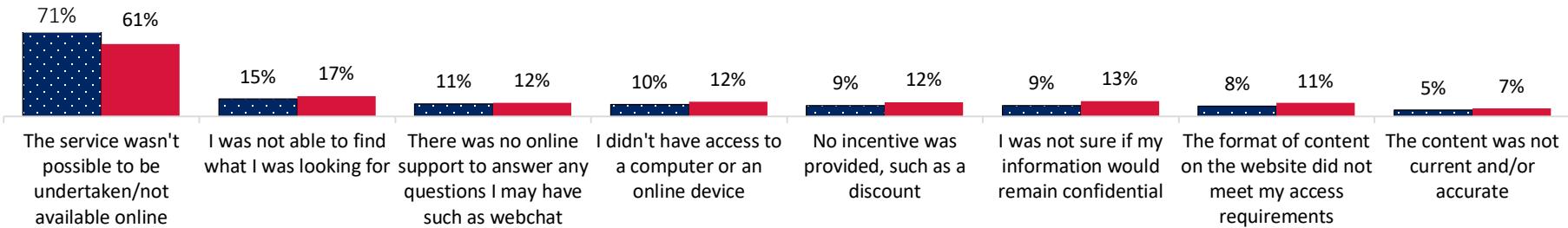
"Now a days it is very **easy to find out** **information**online so I was searching online if i can any help and I google their website."

Not being able to complete services online is the key driver of customers not going online

Key Points

- Consumers consistently mentioned ‘service wasn’t possible to be undertaken online’ as the key driver to not going online.

Figure 5.6: Reasons for not going online*



Consumers and businesses are not going online because.....

- 1 The process cannot be completed online.** Certain interactions such as registration, renewing licenses and applying for a working with children check require a final face to face interaction to verify documentation. Whilst other interactions such as crime reporting with Police services, booking appointments with Public Hospitals and accessibility of mental health and counselling information are reportedly not online at all. Customers hope that an omni-channel experience exists for these interactions to reduce effort and increase ease when dealing with NSW Government services.
- 2 Not aware services can be completed online.** Responses commonly related to documentation services, as customers were not aware that birth, death and marriage documentation could be processed online. Many referred to the process as being high effort and had to provide face to face verification of documentation.
- 3 Online can be alienating and uncomfortable.** The online experience is not felt to be inclusive of all citizens, with more elderly and disabled cohorts finding it difficult to complete the process and rather be assisted in a face to face environment. Hence, it is necessary for services to provide an omni-channel experience so that a face to face option exists for those in need.

*“I personally wish for people simply renewing their working with children check that we could **complete the application fully online**, including **online verification** of our identity if we are already in the system.”*

*“WWCC should be done completely online and shouldn't be needing to go to centre to submit proof of identity etc since it **can be easily scanned and sent via online**.”*

The online experience is expected to be secure, user-friendly, responsive and seamless for consumers and businesses

Consumers and businesses expect the online experience to be...

1 Secure and safe:

- As customers have to provide sensitive documentation to the government, making sure the data and information is dealt with in a secure and safe manner is important, especially for businesses.
- Customers expect that the government is adhering to strict privacy guidelines to ensure that there is not a breach in privacy.

*"I felt like my **information was safe** because I had to **put in a PIN number** which only I know."*

2 User friendly and easy to access information:

- Having an online experience that is designed with clear steps and guidelines which are easy to follow and help consumers and businesses achieve an effective outcome in a timely manner is highly valued and appreciated.
- This means having visuals, customer friendly language and easy navigation on the websites to help consumers and business find the right information first time.

*"My expectation before going online was that it would be **relatively straight forward** because I knew I could log in to my RMS website account and have most of the **information already loaded**."*

3 Be available and responsive at all times:

- Consumers and businesses prefer services and interactions that tailor to their needs, being available makes them feel like government services are able to serve their needs.
- For businesses, it makes them feel like a higher priority and the option of a 24/7 live chat is helpful during off-peak or after business hours.
- Consumers value the convenience of being able to complete processes when they have time by going online.

*"I was expecting it to be **user friendly** and **easy to navigate** and **find all the information I need**."*

*"I would expect replies to any information I request and information I input to the database to be **responded to quickly or in a timely manner**. I expect that they would contact me if I hadn't included all information or if I requested to be contacted. I should be able **access all relevant information, make payments online** when possible."*

4 Seamless with the face to face experience:

A smooth transition from online to a face to face interaction is essential. It provides the flexibility to complete services in their most preferred method and creates a more holistic and inclusive experience that caters to all cohorts.

*"My expectation was **without going to office** I can **collect all information required** by me for my service."*

Online is most preferred by consumers and businesses living in Metropolitan NSW

For consumers, online is most preferred by:

- Age: 35-44 years
- Region: Metropolitan
- Employment status: Student
- Gender: Male
- Income: \$100,001 - \$150,000

"I prefer to do things online as it saves lot of time and energy. My latest interaction was denial of car Rego which was... fast and easy. The experience meets my expectation as the information was simple and clear and I could finish the task with a wink of an eye. This gives a positive impact on my mind."
– Metropolitan, 35-44 years old

For businesses, online is most preferred by:

- Business Size: 20-199 employees
- Region: Metropolitan
- Industry: Transport, postal and warehousing
- Revenue: \$500,001 - \$2,000,000

"Online transactions save time and physical effort. I cannot afford to travel to a physical site to complete what I need doing so online allows me to be more effective."
– Metropolitan, 20-199 employees

Figure 3.12: Consumers with online preferences by demographic cohort

	Highest preference (within demographic category)	Lowest preference (within demographic category)	Increase in preference since 2018	Decrease in preference since 2018
Age	35-44 years (28%)	55-64 years (22%)	35-44 years (3%)	55-64 years (9%)
Region	Metropolitan (26%)	Rural (14%)	nil	Rural (3%)
Employment status	Student (29%)	Employed on a casual basis (15%)	On maternity/paternity leave (3%)	Employed on a casual basis (7%)
Gender	Male (26%)	Female (22%)	nil	Male (3%)
Income	\$100,001 - \$150,000 (33%)	Up to \$30,000 (18%)	\$100,001 - \$150,000 (5%)	\$30,001 - \$50,000 (6%)

Figure 3.13: Business with online preferences by demographic cohort

	Highest preference (within demographic category)	Lowest preference (within demographic category)	Increase in preference since 2018	Decrease in preference since 2018
Business Size	20-199 (25%)	Sole proprietor (16%)	20-199 (7%)	Sole proprietor (10%)
Region	Metropolitan (19%)	Regional (14%)	nil	Regional (14%)
Industry	Transport, postal and warehousing (44%)	Public administration and safety (4%)	Information, Media & Telecom (20%)	Electricity, gas, water & waste services (41%)
Revenue	\$500,001 - \$2,000,000 (22%)	Up to \$50,000 (16%)	\$200,001 - \$500,000 (2%)	\$50,001 - \$200,000 (6%)

Labels in green/red indicate highest satisfaction/lowest satisfaction within the respective demographic group



Email is most preferred by consumers on maternity/paternity leave and businesses in Metropolitan NSW

For consumers, email is most preferred by:

- Age: 35-44 years
- Region: Metropolitan
- Employment status: On maternity/paternity leave
- Gender: Male
- Income: Over \$180,000

*"Recently I heard that I was able to **claim a secondary active kids voucher** for my child through **service NSW**. I had heard this in the media but **receiving an email to advise me** that my child was eligible was an **unexpected pleasant surprise** as I had previously thought this would be something I'd have to **exert great effort to claim.**"
- Metropolitan*

For businesses, email is most preferred by:

- Business Size: 2-5 employees
- Region: Metropolitan
- Industry: Electricity, gas, water waste service
- Revenue: Over \$2,000,000

Figure 3.14: Consumer with email preferences by demographic cohort

	Highest preference (within demographic category)	Lowest preference (within demographic category)	Increase in preference since 2018	Decrease in preference since 2018
Age	35-44 years (22%)	65 years+ (10%)	35-44 years (3%)	25-34 years (2%)
Region	Metropolitan (19%)	Regional (13%)	Rural (2%)	Regional (0%)
Employment status	On maternity/paternity leave (25%)	Retired (12%)	On maternity/paternity leave (8%)	Student (4%)
Gender	Male (19%)	Female (16%)	nil	Female (1%)
Income	Over \$180,000 (25%)	Up to \$30,000 (12%)	\$150,001 - \$180,000 (8%)	\$100,001 - \$150,000 (5%)

Figure 3.15: Business with email preferences by demographic cohort

	Highest preference (within demographic category)	Lowest preference (within demographic category)	Increase in preference since 2018	Decrease in preference since 2018
Business Size	2-5 (29%)	6-9 (18%)	2-5 (5%)	20-199 (3%)
Region	Metropolitan (26%)	Rural (17%)	Rural (17%)	nil
Industry	Electricity, gas, water waste service (41%)	Transport, postal and warehousing (1%)	Electricity, gas, water waste service (40%)	Education & training (10%)
Revenue	Over \$2,000,000 (33%)	Up to \$50,000 (17%)	Over \$2,000,000 (13%)	\$500,001 - \$2,000,001 (4%)

Labels in green/red indicate highest satisfaction/lowest satisfaction within the respective demographic group

NSW consumers and business had higher usage of online services compared to other jurisdictions in 2019

In 2019, NSW Consumers had the highest usage of face to face and online servicing compared across jurisdictions.

Businesses in NSW were consistent with other jurisdictions in their channel usage, with slightly higher online usage.

Figure 3.17: Consumer contact method used by jurisdiction

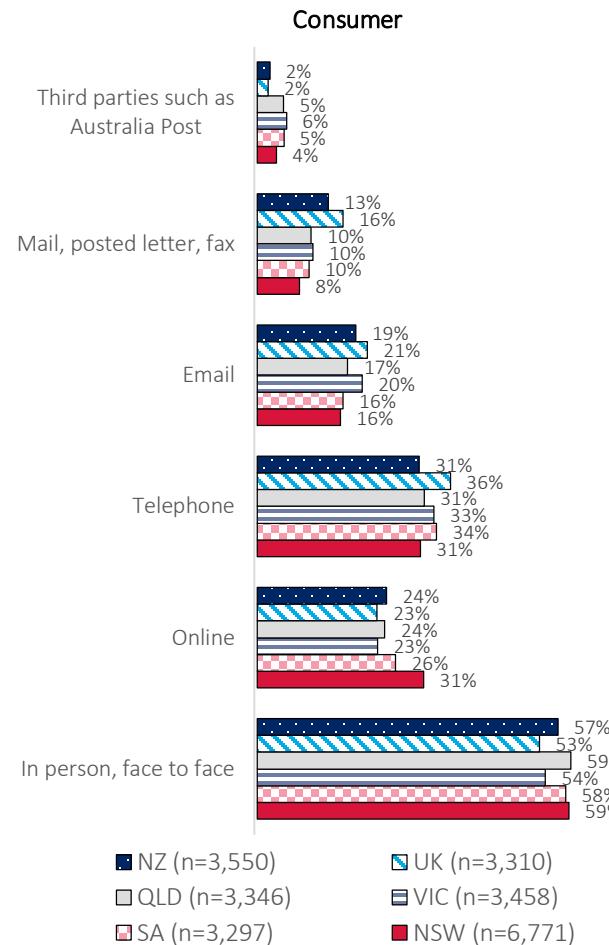
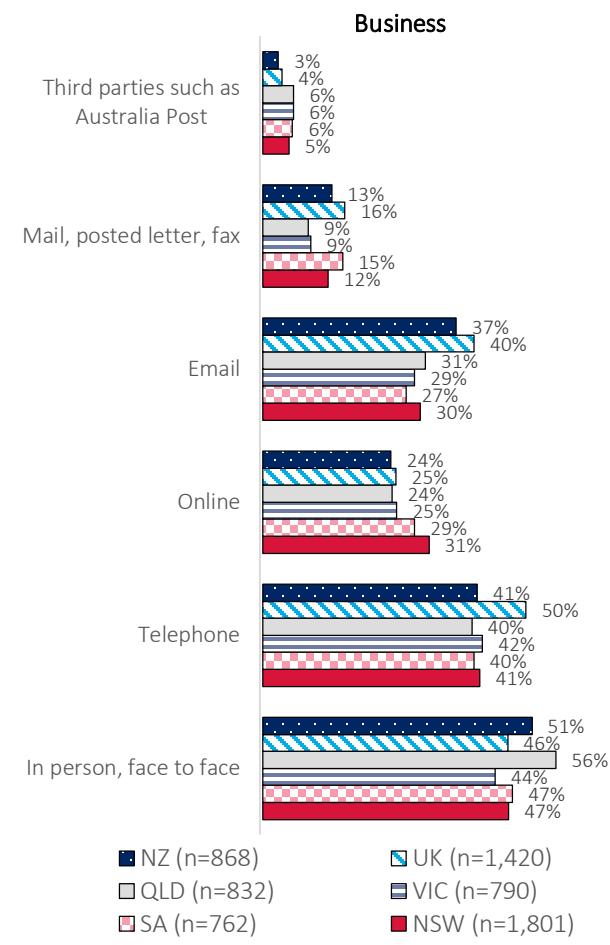


Figure 3.18: Business contact method used by jurisdiction





More consumers have seen a NSW Government promotion compared to 2018

Key Points

- Awareness of NSW Government initiatives is increasing year on year, with 42% of customers indicating they have seen a promotion in 2019 compared to 38% in 2018.
- Exposure to TV channels is decreasing while exposure to social media channels is increasing – those that have seen a NSW Government promotion via TV decreased from 55% in 2018 to 51% in 2019, while social media viewing increased from 13% in 2018 to 17%.

Figure 9.1: The percentage of customers who have seen a NSW Government service promotions

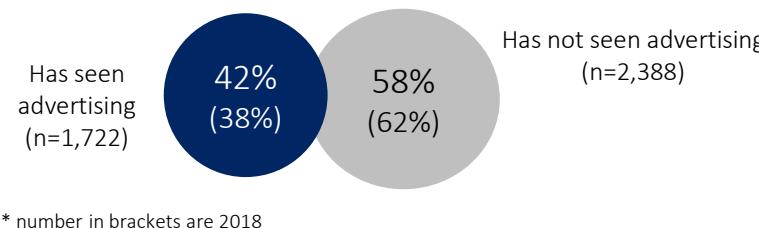


Figure 9.3: Promotions seen by contact method

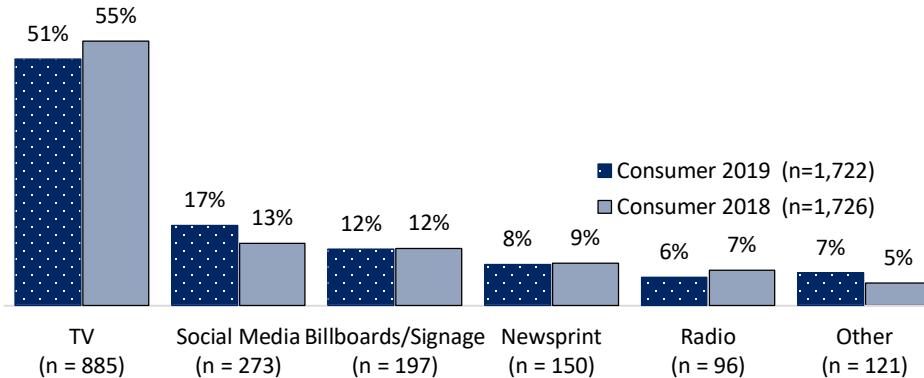
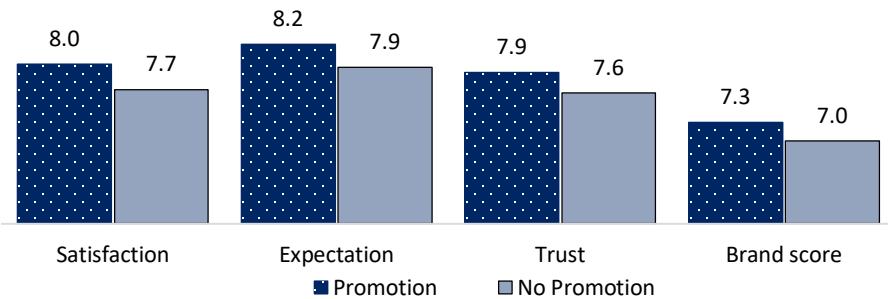


Figure 9.2: Promotions seen by outcome measures



Comments in support of what kinds of promotions were heard and seen:

"Improved services, facilities and infrastructure of overall transport systems!"

"All the new public transport and new roads and tunnels"

"Active kids vouchers, Rebates available"

"Subsidized appliances, power subsidies for seniors"

"I think it was regarding financial assistance for children to play sports"



4. Brand Perception



Consumers' perceptions of NSW Public Service overall has increased, closing the gap with Airlines

Key Points

- Consumers' perception of NSW Public Service overall increased from 6.8/10 in 2018 to 7.1/10 in 2019. This result puts NSW Public Service overall on par with Airlines, making them equal first compared to other industries tested in the survey.
- In comparison to other industries, NSW Public Service overall has had a the most steady and ongoing increase in perceptions of the last 5 years.

Figure 4.1: Brand perceptions of industries and public services - Consumers

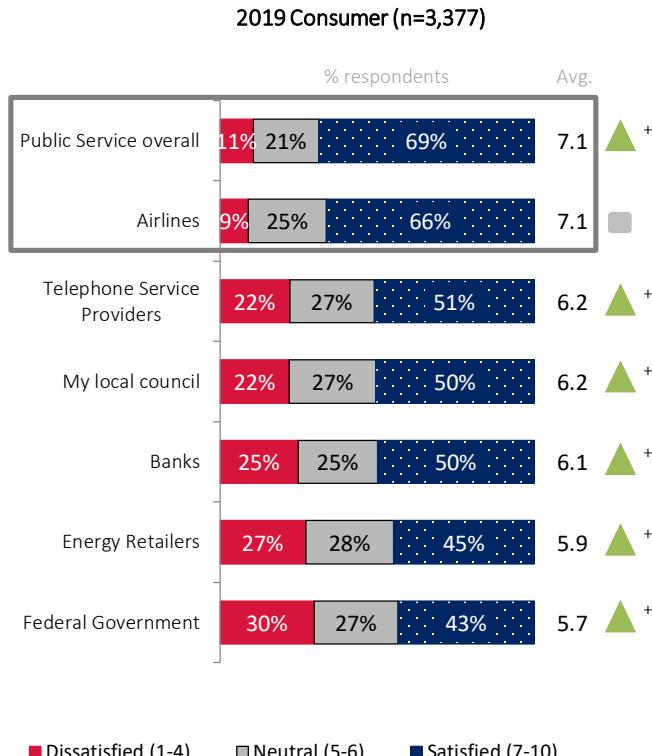
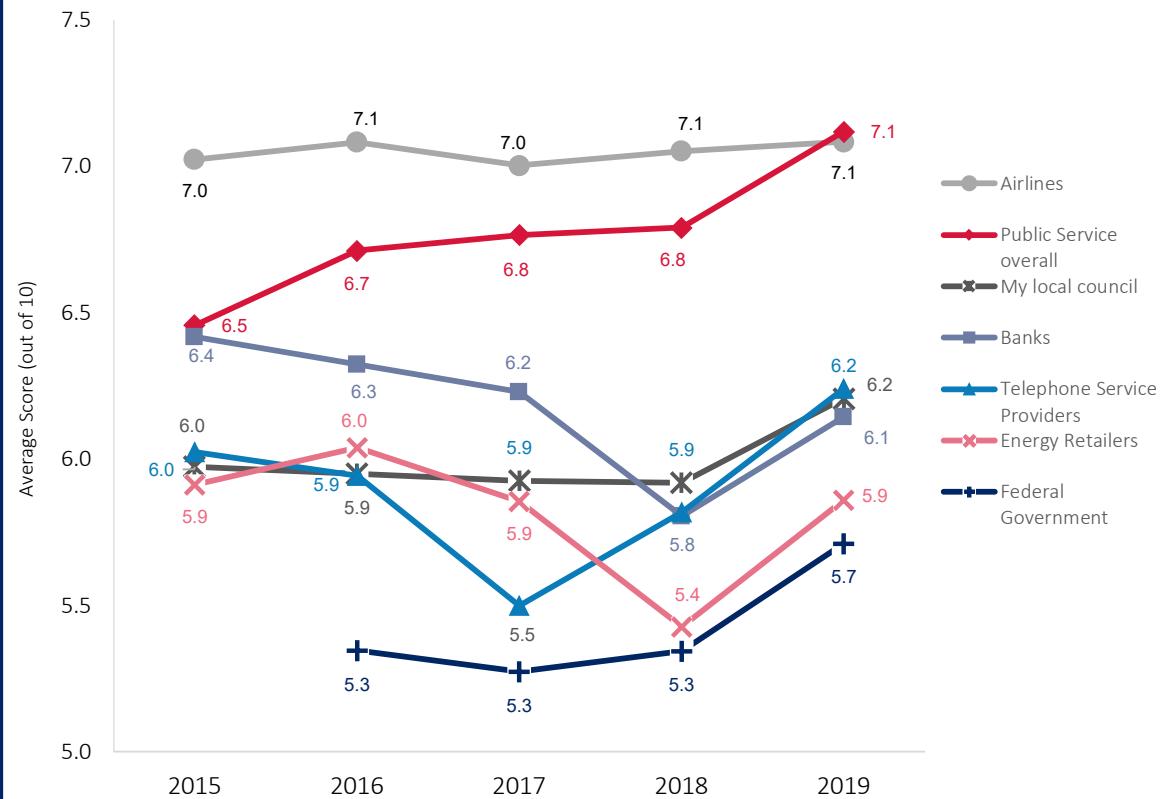


Figure 4.2: Brand perceptions of industries and public services - Consumers



Businesses' perceptions of NSW Public Service overall have remained stable in 2019 compared to 2018

Key Points

- Businesses' perceptions of NSW Public Service maintained a rating of 6.9/10 across 2018 and 2019. This continues to place NSW Public Service second behind Airlines in terms of brand perception by business.
- Federal Government was the only industry to have experienced an increase compared to 2018 results for business.

Figure 4.3: Brand perceptions of industries and public services - Businesses

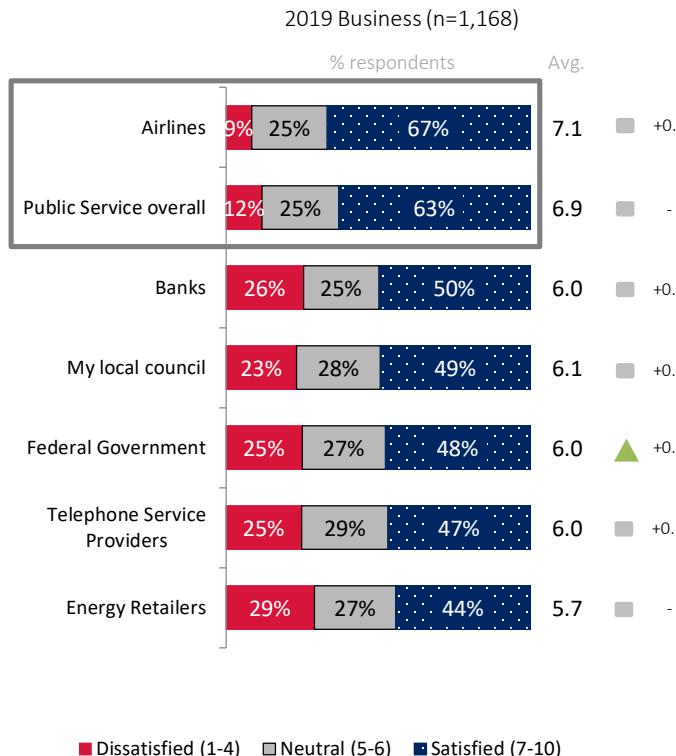
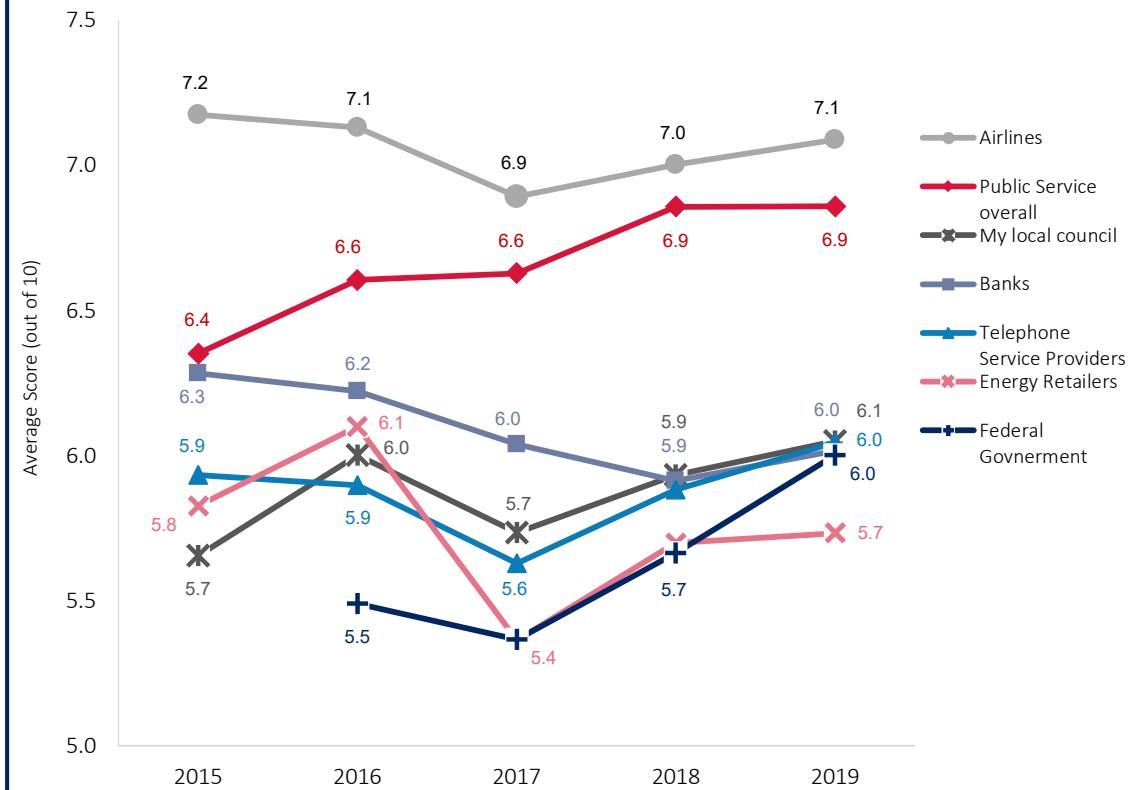


Figure 4.4: Brand perceptions of industries and public services - Businesses



Perceptions of NSW Public service are influenced by both external factors and direct interactions

External factors and direct interactions play a role in informing brand perceptions

1

External factors informing brand perceptions

- When customers were asked to describe what they associated with 'NSW Public Service' consumers and businesses were likely to think of civil servants.
- This led customers to default to stereotypes that they have of government employees, they used words such as lazy, red tape and bureaucratic to describe how they perceived "public service".
- Businesses were more likely to place emphasis on their perceptions of civil servants although it was also evident in the consumer group.
- Customers' personal opinions on the political environment also inform brand perceptions, customers spoke of their frustrations with significant infrastructure builds that they felt were not in the best interests of the people of NSW leading them to be less trusting of the government.
- Customers consistently misunderstand the difference between local council, state and federal government so customer interactions with these services also have an impact on brand perceptions.
- Advertising and media also play a role in informing brand perceptions with a number of customers mentioning adverts they saw for drink driving and rebates and vouchers that they may be eligible for. For the most part these interactions had a positive result on the brand, unless the customer felt that that they would be negatively impacted.

"Large, bureaucratic organisation that is process and not people driven."

"When I think about the NSW Public service I think about the thousands of people working behind the scenes to ensure that the state runs smoothly and all stakeholders are working together to develop policy and implement services."

"It's continued to improve as Service NSW employees have been the opposite of what you would expect of public service to be."

2

Direct interactions informing brand perceptions

- For the most part the direct interactions that customers had with NSW government services were more positive than the external factors informing brand perceptions.
- The direct interactions driving positive brand sentiment were; interactions which friendly and efficient staff particularly SNSW, interactions which can now be completed online.

"My overall perception of the NSW Public Service is that it's somewhat acceptable, but not ideal...in an emergency situation where I needed medical attention...I would trust and have confidence in them dealing with the situation successfully. However, when it comes to...RMS I have the perception that it's somewhat slow and inefficient and my satisfaction in how those services are delivered is not a priority for the government"

Increasing perceptions of the NSW Government Brand in 2019 are influenced by 4 key factors

1

Overall consumers and businesses are seeing evidence that government services are evolving and adopting technology

2

Consumers and businesses see NSW government as trying their best to care for the citizens of NSW

3

Stagnating perceptions by businesses seem to be driven by direct and external factors which lead the belief that the government is bureaucratic and slow moving

4

Service NSW is driving positive perceptions amongst consumers

- Consumers and Business are seeing clear evidence that government services are evolving for the better.
 - This is driven by the increased digitisation of services and more efficient processes through Service NSW.
 - There is also a perception amongst consumers that government services are becoming more tailored to the needs of the population.
 - The improvements that customers are seeing are driving positive sentiment however the improvements are likely to increase their expectations across government services as they have set a new standard.
 - For businesses in particular the digitisation of services is happening at a slower rate than they would like.
-
- Many consumers and businesses feel that the NSW government is doing the best that they can to support the citizens of NSW.
 - This perception is driven by: staff interactions that demonstrate care and empathy particularly in vulnerable circumstances such as public housing or emergency services and previous experiences that have been positive or neutral.
-
- Consumers and businesses consistently describe NSW Government as 'bureaucratic' and 'slow moving'.
 - In some ways this is seen as positive because it indicates to businesses that additional precautions are being taken into account and that their data and information is protected.
 - On the other hand particularly business feel frustrated and that processes take longer than they need to.
 - Services such as documentation services and the courts were driving this perception as well as stereotypes that businesses have about the government.
 - For businesses, interactions with Service NSW has had less of a positive impact. Many are frustrated when they have to visit a service centre in person.
-
- Service NSW provides customers a seamless offline and online experience
 - The increased speed with which customers can complete their government transactions makes customers feel that their time is valued and is playing a role in driving positive brand perception.

Consumer brand scores increased across a range of demographic groups in 2019; while for businesses, increases were amongst rural businesses and those with revenues over \$2,000,000

Key Points

- Perception toward NSW Public Service overall is highest among consumers with an income between \$30,001-\$50,000, females, those living in regional NSW and citizens aged 65+ years.
- Rural businesses and businesses with revenues over \$2 million had the biggest increase in brand score, whilst Accommodation and Food Services industries decreased.

Figure 4.5: Consumer brand score by demographic cohorts

	Highest brand score (within demographic category)	Lowest brand score (within demographic category)	Biggest change in brand score (within demographic category)
Age	65 years + 	35-44 years	65 years + 
Region	Regional 	Metropolitan 	Regional 
Employment status	Maternity/ Paternity leave	Unemployed	Not working 
Gender	Females 	Males 	Females 
Income	\$30,001 - \$50,000 	Over \$180,000	\$30,001 - \$50,000 

Figure 4.6: Business brand score by demographic cohorts

	Highest brand score (within demographic category)	Lowest brand score (within demographic category)	Biggest change in brand score (within demographic category)
Business size	10-19 employees	2-5 employees	200+ employees
Region	Metropolitan	Rural 	Rural 
Industry	Information, media and telecommunication	Accommodation and Food services 	Accommodation and Food services 
Revenue	\$200,001 - \$500,000	\$500,001 - \$2,000,000	Over \$2,000,000 



Statistically significant increase in avg. from previous year (at 99% level of Confidence)



No significant change in avg. from previous year (at 99% level of Confidence)



Statistically significant decrease in avg. from previous year (at 99% level of Confidence)

Overall the performance of NSW Public Service in comparison to other industries is highest across jurisdictions for consumers and businesses

Key Points

- Consumer satisfaction of NSW Public Service overall is highest in comparison to other industries across jurisdiction.
- Business satisfaction of NSW Public Service overall is highest in comparison to other industries across jurisdictions.

Figure 4.7: Comparison of Public Service brand perceptions across jurisdictions

Consumer Avg. satisfaction across industries (scale from 1 - very dissatisfied to 10 - very satisfied)

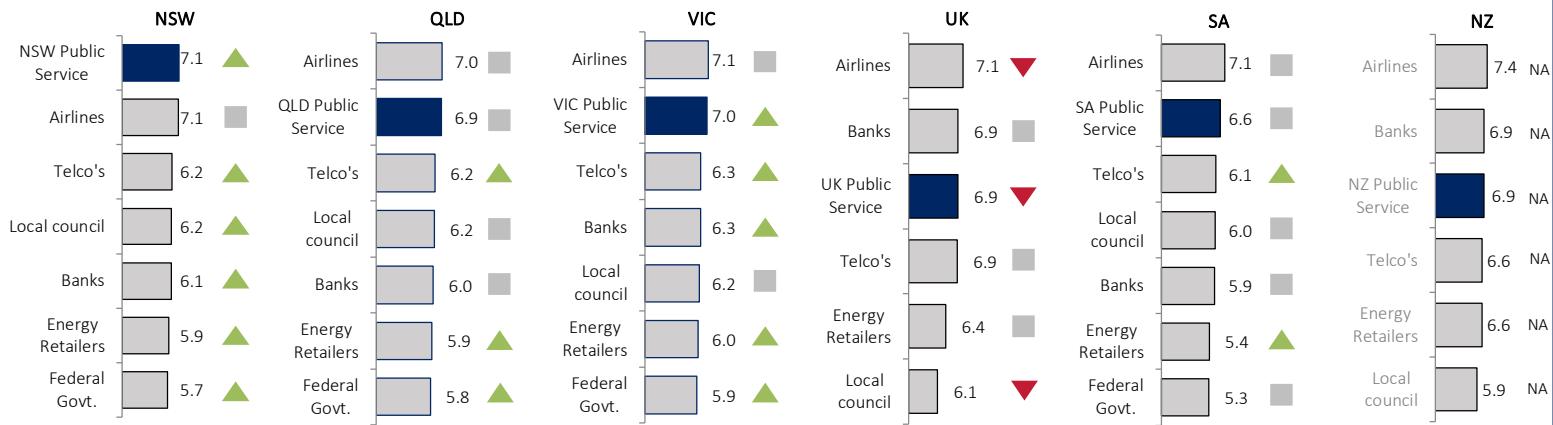
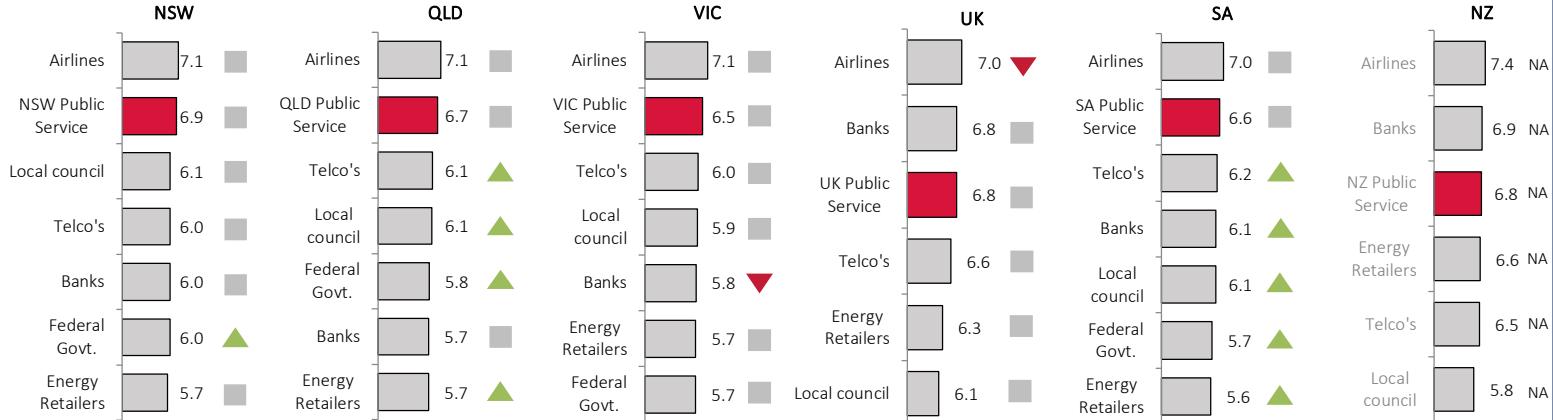


Figure 4.8: Comparison of Public Service brand perceptions across jurisdictions

Business Avg. satisfaction across industries (scale from 1 - very dissatisfied to 10 - very satisfied)



Legend:

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

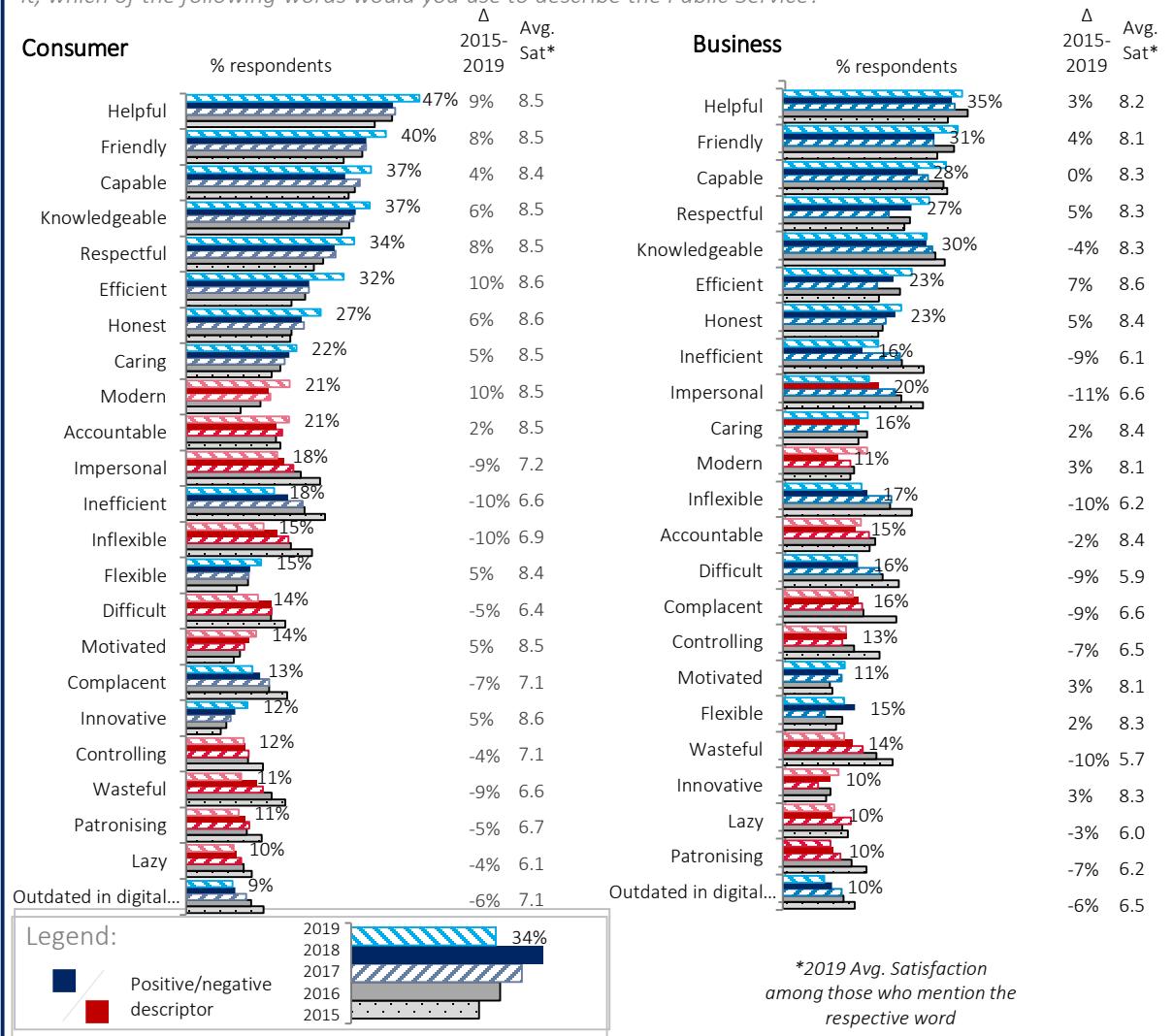
'Helpful', 'friendly' and 'capable' are the top three words used to describe NSW Public Service overall

Key Points

- The top three words chosen by consumers and businesses to describe NSW Public Service overall are 'helpful', 'friendly' and 'capable' which are all positive descriptors.
- The top three negative words to describe NSW Public service overall for both consumers are businesses are 'impersonal', 'inefficient', and 'inflexible'.
- Among consumers, the overall satisfaction is highest among those who selected 'efficient', 'innovative', and 'honest' to describe the NSW Public Service. Among businesses, the overall satisfaction score is highest among those who associated 'efficient', 'honest', 'caring', and 'accountable' with the NSW Public Service.

Figure 4.9: % distribution across 2015-2019 and average satisfaction for 2019

Question: "Thinking now about the 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 Public Service?"





5. Feedback



On average, a third of consumers and businesses are still finding it difficult to make a complaint

Key Points

- The percentage of consumers and businesses that provided feedback has remained stable compared to 2018.
- Approximately a third of consumers and businesses are finding it difficult to make a complaint, with average scores remaining consistent with 2018.
- Qualitative research supported this, with consumers and businesses mentioning the difficulty of making and receiving a timely response from a complaint. This was especially true for Public Transport services, with consumers reporting the lack of responsiveness to the complaint from the service.

Figure 5.1: Percentage of respondents who provided feedback

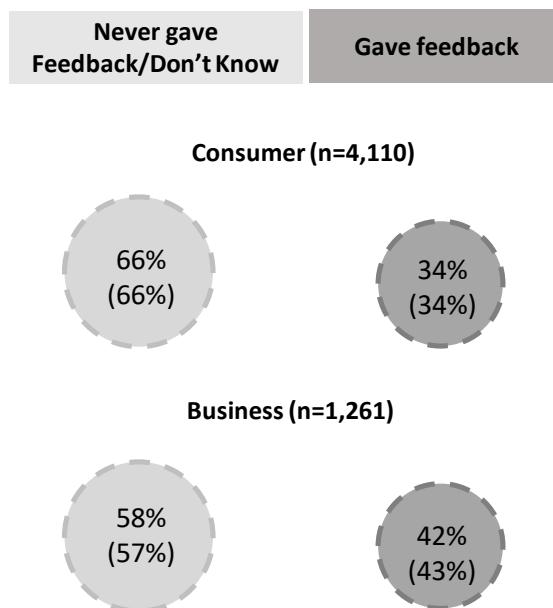


Figure 5.2: Level of ease to make a complaint

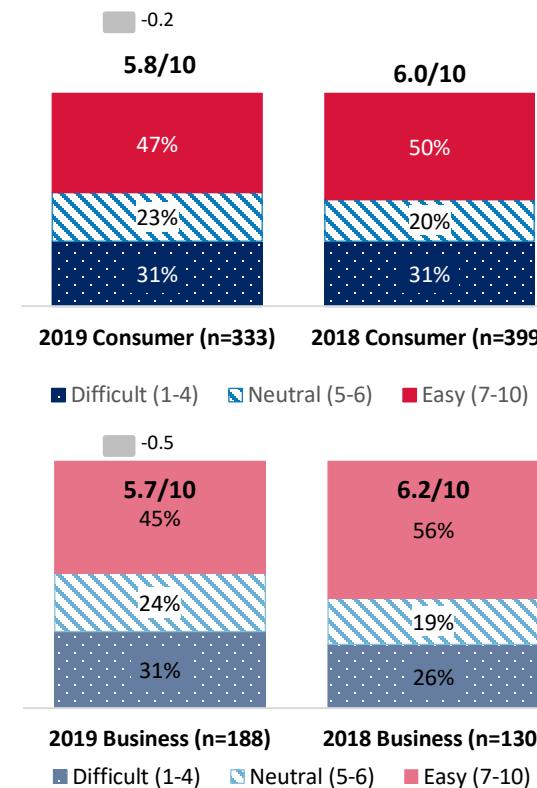
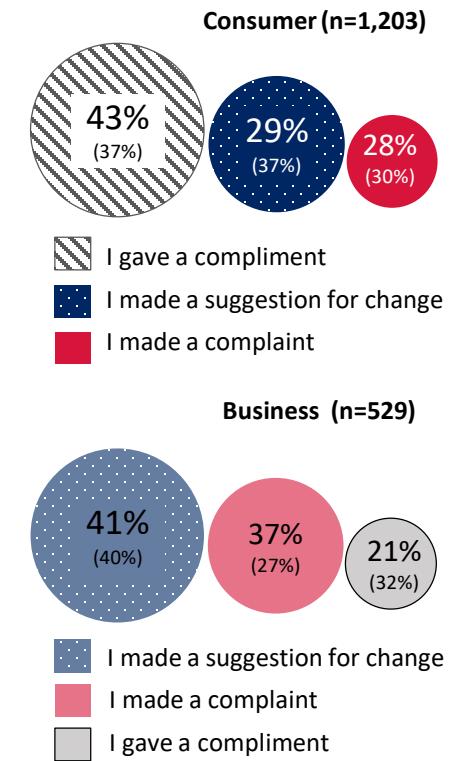


Figure 5.3: Nature of feedback



*Numbers in brackets are from 2018



Complaint handling has been consistently poor year on year, impacting satisfaction and trust

Key Points

- On average, perception of how well complaints were handled has remained consistent for consumers and businesses from 2018 to 2019.
- Although not significant, consumers who rated overall complaints as handled poorly increased by 3% compared to 2018. Similarly, for businesses, overall complaints which were rated as handled poorly increased by 7% compared to 2018.
- For businesses, those that rated their complaint as being handled well, have higher satisfaction and expectation levels compared to average scores in 2018.

Figure 5.4: Complaint handling

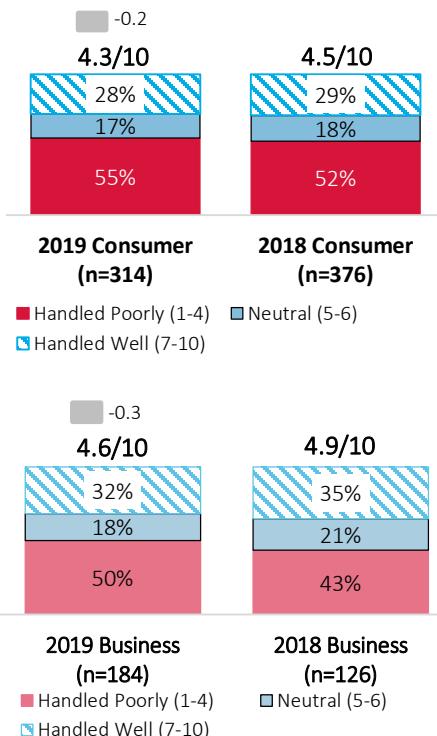
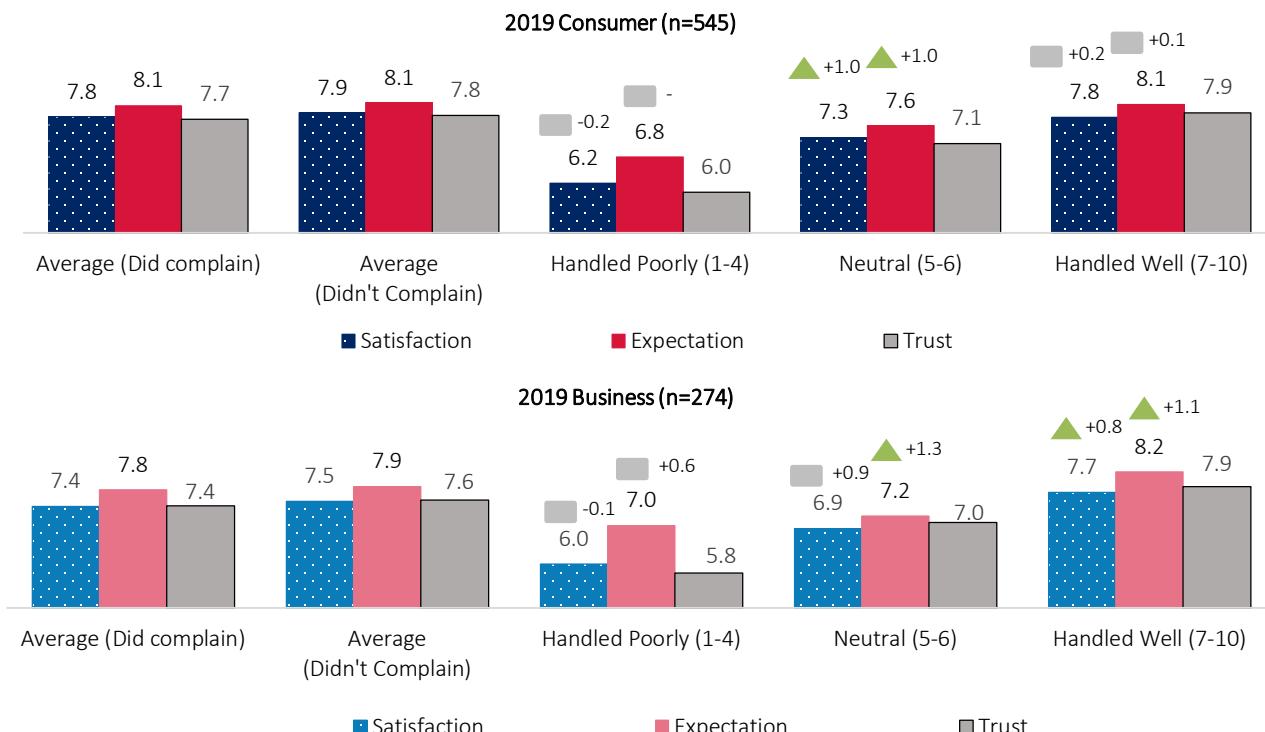


Figure 5.5: Complaint handling experience by outcome measures



Note: Data is indicative only

¹Differences in sample size to figure 5.6 are due to respondents providing outcome measure for multiple services but only providing feedback about their complaints experience for a single service

Legend:

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

Complaints and suggestions more often relate to processes

Key Points

- For consumers and businesses, compliments are most prominent for employee related interactions, whereas suggestions and complaints typically relate to processes.
- For consumers, 42% of compliments were based on employee interactions and 35% of suggestions for change were on processes.
- For businesses, 36% of compliments were based on employee interactions and 48% of suggestions for change were on processes. Complaints and suggestions are more commonly given by email or website, compared to compliments.

Figure 5.6: Nature of feedback by feedback type

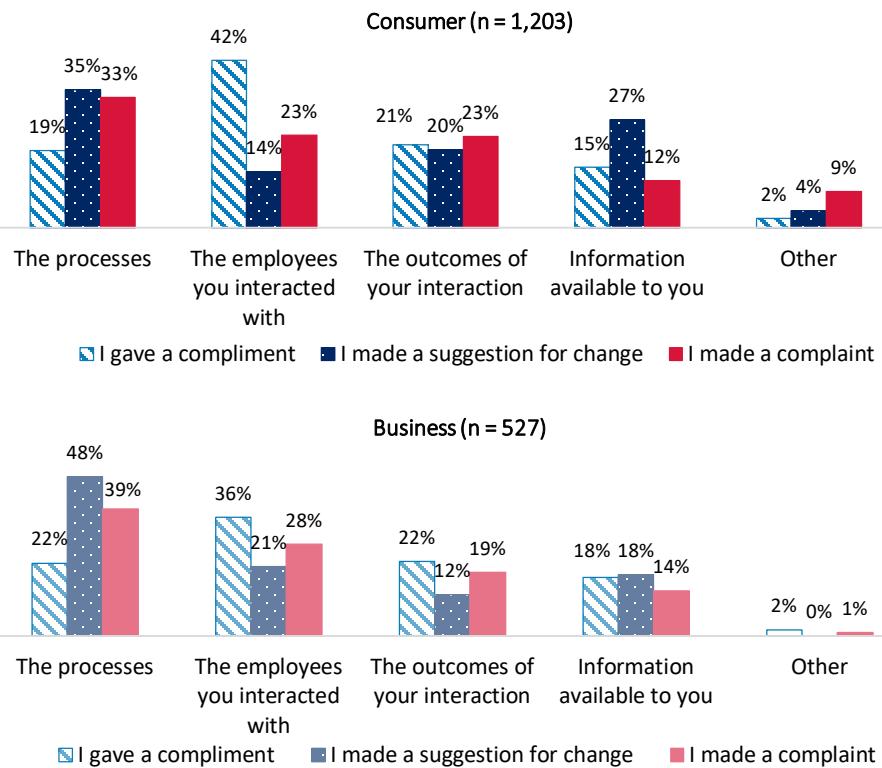
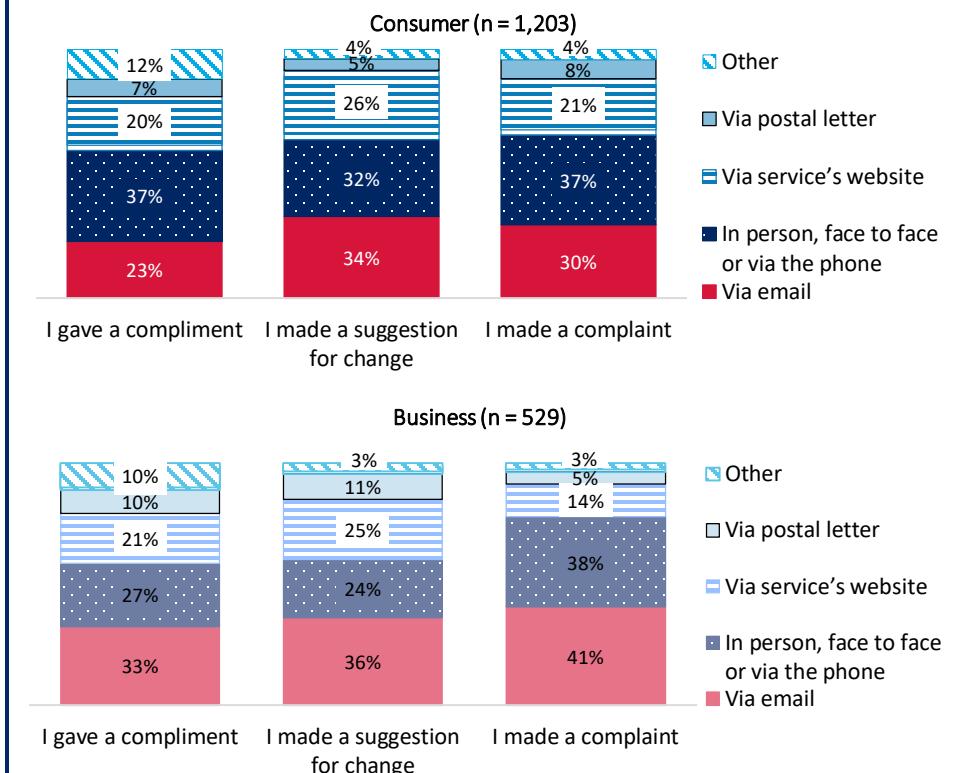


Figure 5.7: Nature of feedback by method used





Businesses in NSW have the smallest proportion of complaints among other jurisdictions

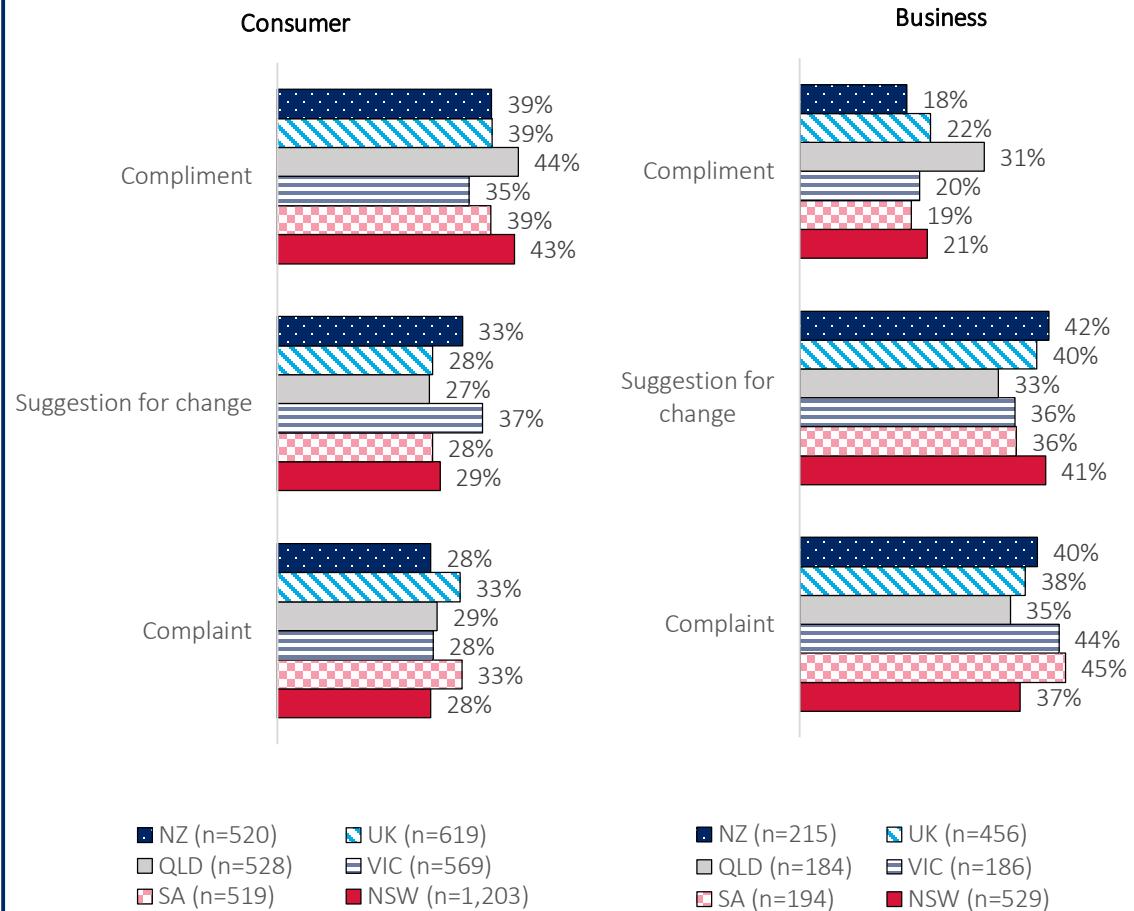
Across jurisdictions, NSW has received the lowest proportion of complaints compared to other feedback types for consumers, on par with New Zealand and Victoria.

For businesses, NSW received the second-lowest proportion of complaints, after Queensland. NSW also had the second-highest suggestions for change compared with other jurisdictions, behind New Zealand.

Consumers in NSW received the second-highest proportion of compliments compared with other jurisdictions, after Queensland.

Conversely, businesses in NSW received the third highest proportion of compliments, but still had 10% less than Queensland.

Figure 5.8: Nature of feedback by jurisdictions



Note: Results are subject to rounding and may not sum to 100%



6. Case Study: Service NSW



Consumers and businesses who interact with Service NSW have higher expectations, satisfaction and comparison to ideal scores

Key Points

- Consumers and businesses who interacted with Service NSW, score higher across all outcomes measures as well as trust with NSW Government services.
- For consumers, the most common Service NSW interactions include 'apply/renew/modify car registration' and 'apply/renew/modify drivers license'.
- For businesses, the most common Service NSW interactions related to 'apply/renew registration for business vehicle' and 'renew driver's licence for business purposes'.

Figure 6.1: Outcome measures by Service NSW vs Non-Service NSW - Consumer



Figure 6.3: Top 5 Service NSW interaction types (by frequency) - Consumer

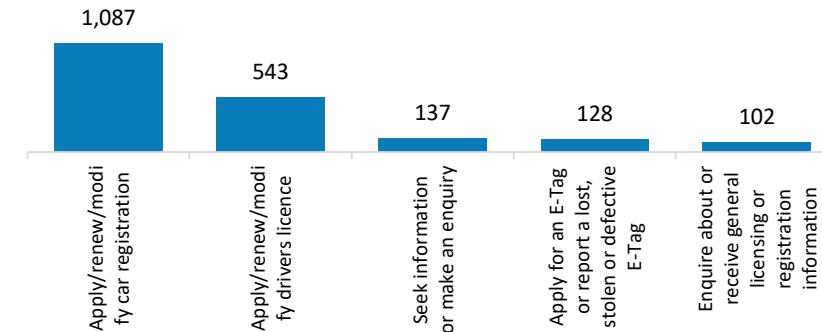
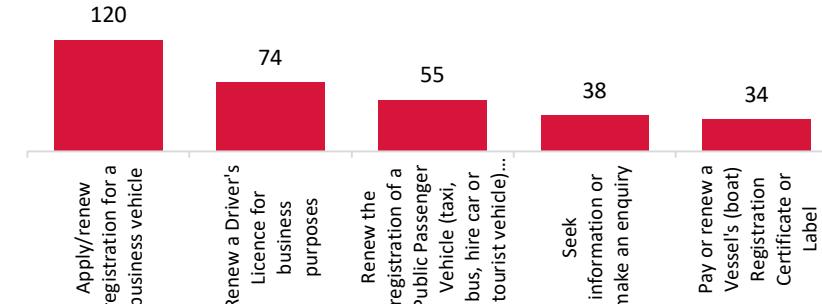


Figure 6.2: Outcome measures by Service NSW vs Non-Service NSW - Business



Figure 6.4: Top 5 Service NSW interaction types (by frequency) - Business



Consumers and businesses who interact with Service NSW have lower effort scores, associated with higher online usage

Key Points

- The average effort scores for undertaking the same transaction are lower for consumers and business that used Service NSW than other service providers for similar interactions.
- The proportion of consumers who rated low effort put forth (i.e. 1-4 out of 10) was 42% for those who interacted with Service NSW compared to 29% for those who used another service provider (a difference of 13%).
- Service NSW has a higher percentage of online interactions compared to other services; the ability to complete interactions online for Service NSW are likely contributing to overall lower effort scores.

Figure 6.5: Breakdown of Service NSW effort – Consumer
Average Customer Effort Score (CES)

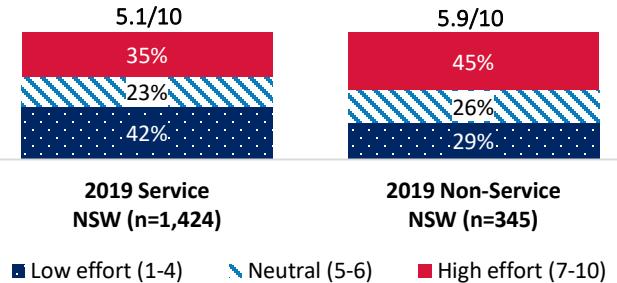


Figure 6.7: Contact method used by Service NSW vs. Non Service NSW - Consumer

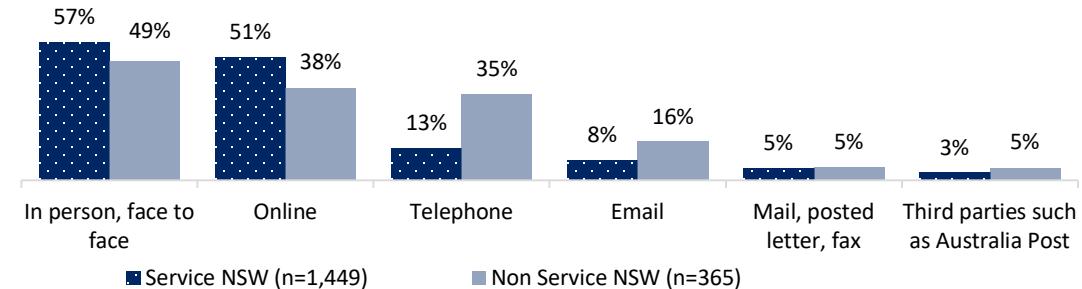


Figure 6.6: Breakdown of Service NSW effort – Business

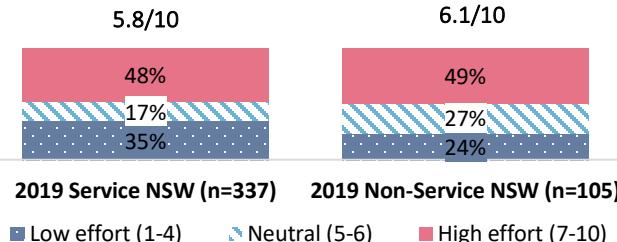
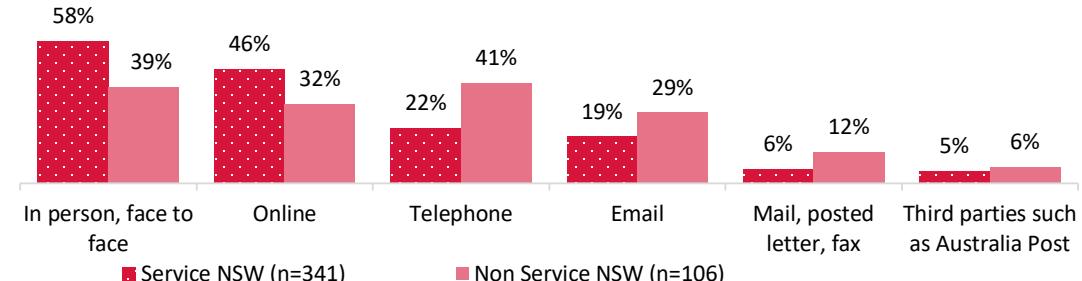


Figure 6.8: Contact method used by Service NSW vs. Non Service NSW - Business



*Note: We cannot do sig testing for Service NSW and Non Service NSW as this was asked for first time in CSMS 2019

Higher outcome measures and lower effort for regional Service NSW interactions compared to metropolitan areas

Key Points

- Consumers and businesses who interacted with Service NSW within regional areas scored higher across all outcomes measures compared to metropolitan areas.
- For consumers and businesses, effort associated with Service NSW interactions in regional areas are lower compared to Service NSW interactions in metropolitan areas.

Figure 6.9: Outcome measures of Service NSW by region - Consumer

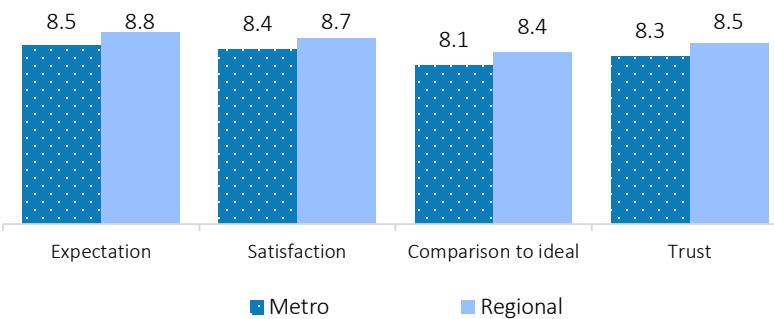


Figure 6.10: Outcome measures by Service NSW by region - Business

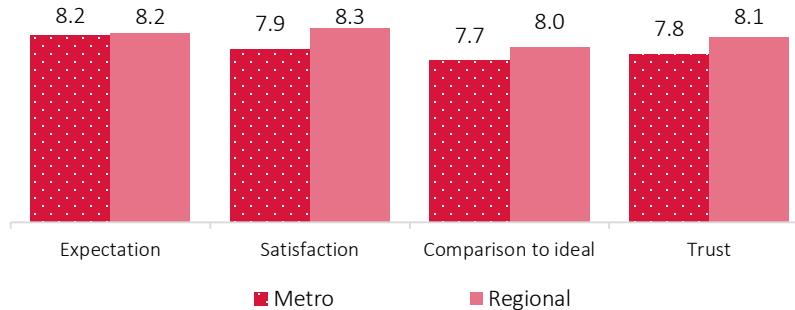


Figure 6.11: Breakdown of Service NSW effort by region – Consumer

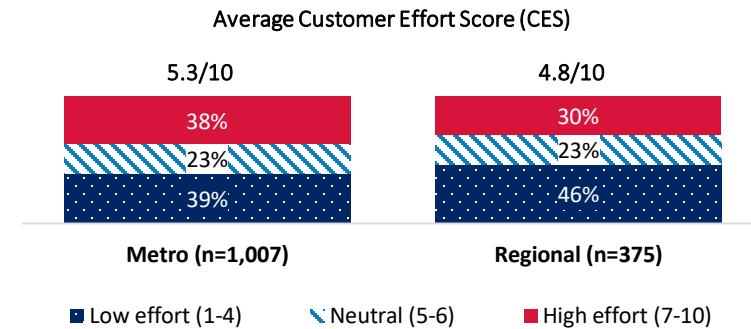
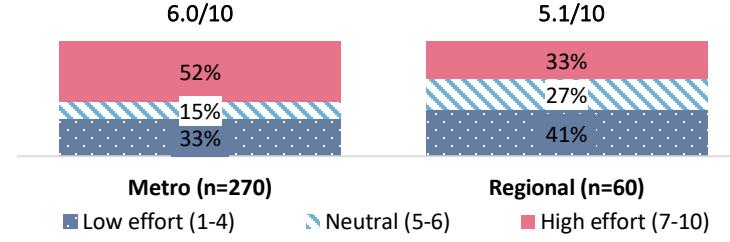


Figure 6.12: Breakdown of Service NSW effort by region – Business



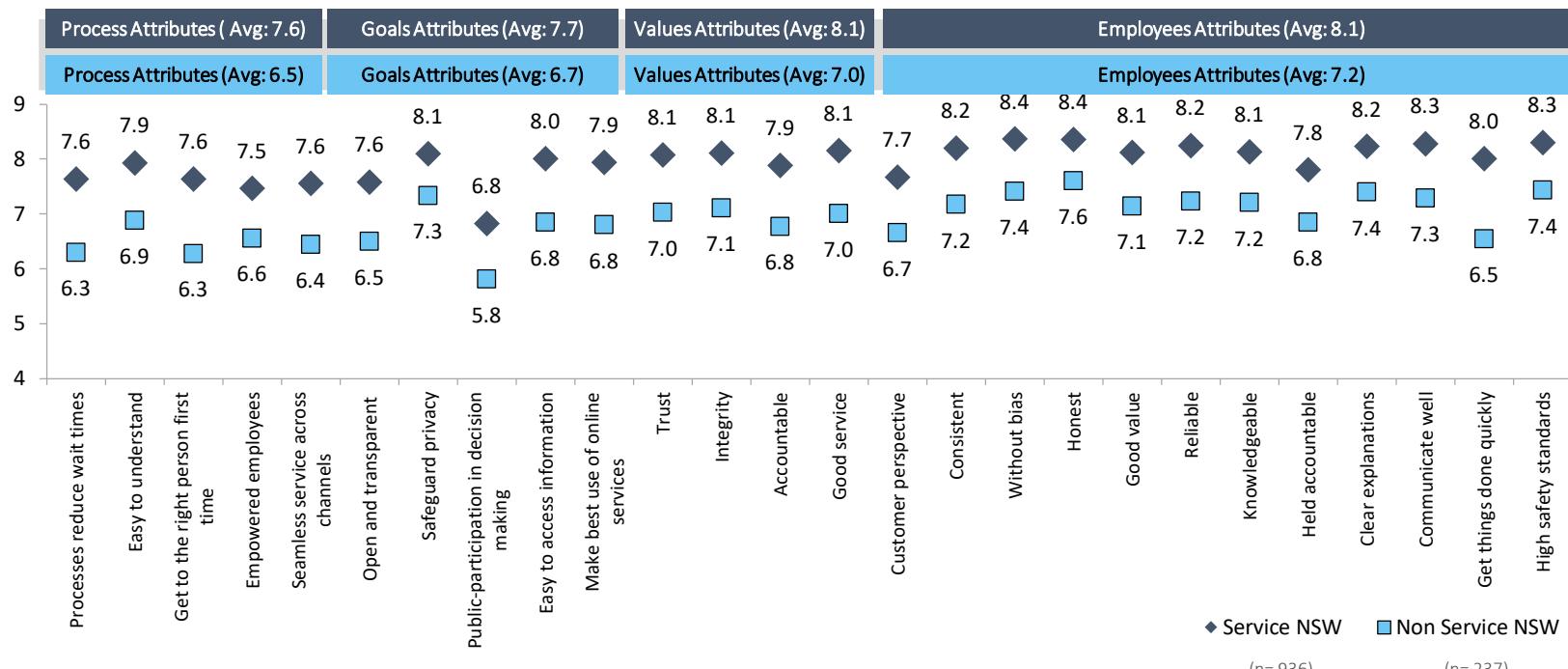


Service NSW scores higher across all attributes than other services providing similar interactions for consumers

Key Points

- Service NSW received higher scores across all attributes compared other services providing similar interactions.
- The employee attribute of 'get things done quickly' had the largest difference in scores, with Service NSW consumers scoring 8.0/10 whilst consumers who received the same service from another provider scored the attribute on average 6.5/10, a difference of 1.5/10.
- Process attributes had the largest difference in overall scores, of which 'processes reduce wait times' and 'get to the right person first time' both scored 1.3/10 higher for Service NSW consumers compared those who interacted with other service providers.

Figure 6.13: Average score of consumer attributes – Service NSW vs. Non Service NSW – For Service NSW interactions (out of 10)



Informative staff, efficient services and an omni-channel experience contributed to high consumer satisfaction with Service NSW

Positive perceptions of Service NSW are influenced by:

Friendly and informed staff:

- Consumers value the friendly, helpful nature of staff at Service NSW service centres. Being greeted at the door and assisted with the e-ticketing system helped consumers feel comfortable and clear about what they needed to do. This is particularly helpful for consumers who don't feel comfortable using technology and need support interacting with it.
- Consumers frequently mention interacting with staff who were informed and actively trying to help. This gave them confidence in the service and that they would be able to easily complete their transaction.

"Must say it has exceeded my expectations, it's so easy, quick, and no need to visit a Service NSW store, and waste time waiting and getting there."

Easy and efficient processes:

- Renewing car registration was an experience that a high number of consumers referred to. Most could tangibly see improvements in the overall efficiency of the process which they felt demonstrated the government cared about them and their time.
- Having an omni-channel experience enabled customers to use the channel that they feel most comfortable with and increased ease when interacting with government services.
- Consumers value interactions being consolidated under one banner in a one stop shop this is a crucial factor in ensuring that interacting with service NSW requires comparatively low effort to engage with. However this can cause confusion and frustration with NSW Government services that can't be completed through Service NSW.

"The aspects of the experiences impacting my expectations were the efficiency and ease of the online process, and the friendliness, professionalism and quality questions asked by the reception staff at the office as to the purpose of my visit, to ensure that I really needed to be there or if I could complete it online."

Negative perceptions of Service NSW are informed by:

- Consumers who thought that they would be able to complete their interaction online but were then forced to complete their transaction face to face e.g. having to go into Service NSW for an eye test had a lower satisfaction with their experience of Service NSW.
- Similarly, consumers who thought that they would be able to receive a discount or rebate but do not get one felt frustrated.
- Both of these examples indicate that expectations were not set for these customers.
- Some consumers also found it challenging to find information on Service NSW online.

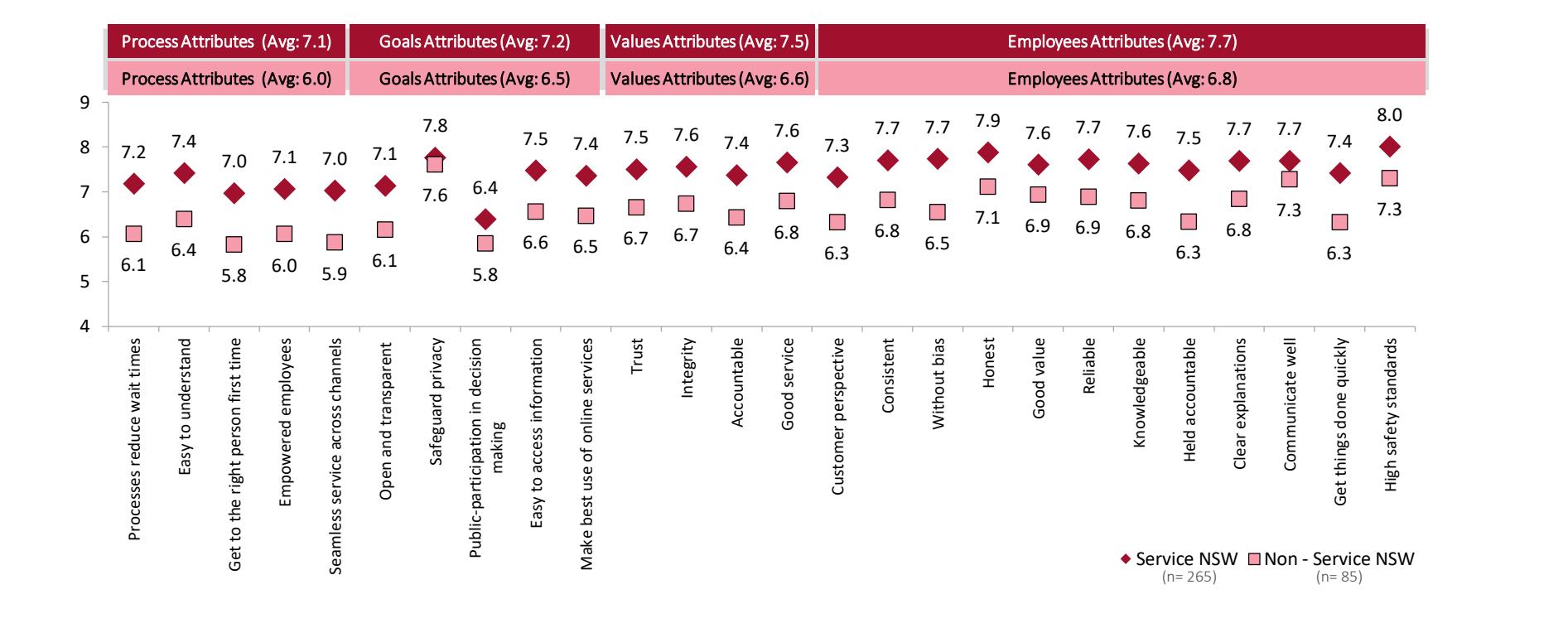
"I used the online service to find out if I was eligible for the Green Slip rebate that was widely advertised. I was very surprised to discover I wasn't...this outcome didn't meet my expectations...could not find anywhere that...explained to me why I wasn't eligible...I couldn't see a chat function to discuss this or ask questions.. so it would be the lack of information on why I wasn't eligible that impacted the experience of my expectations."

Service NSW scores higher across all attributes than other services providing similar interactions for businesses

Key Points

- On average, businesses who undertook their interaction with Service NSW have higher attribute scores than businesses who undertook interactions with other NSW Government services.
- Process attributes overall had the largest difference in scores; businesses who interacted with Service NSW scored these attributes 7.1/10 on average, compared to 6.0/10 from those who received services from another provider.
- The specific attributes of 'processes reduce wait times', 'get to the right person the first time' and 'seamless service across channels' were greater than 1.0/10 higher for businesses who engaged with Service NSW compared to those who received services from another provider.

Figure 6.14: Average score of business attributes – Service NSW vs. Non Service NSW – For Service NSW interactions (out of 10)





Service NSW make businesses feel prioritised and a valued client by delivering services in a timely and efficient manner

Overall:

- Businesses value all aspects of the Service NSW experience which help to reduce time and improve efficiency. They place less emphasis on the friendliness of the staff than consumers and are overall less enthusiastic than consumers are about their experiences
- None of the Businesses in the qualitative research mentioned Easy To do Business specifically indicating that there is still low awareness of this initiative

*"Their service **met my expectation as the process did not take too long** and was fairly **simple and straightforward**.*

The interaction with staff reflected their professionalism and willingness to help."

Positive perceptions of Service NSW are informed by:

- Being able to complete multiple interactions under the same roof was seen as incredibly valuable for Businesses as it reduced the time that they had to spend interacting with government services
- Appreciate the detailed knowledge of staff have particularly when it is relevant to their business
- Staff were also described as professional and willing to help which made Businesses feel valued
- Friendly staff less of a focus but they appreciate the time that staff take to understand their circumstances

*"The experience **exceeded my expectations** as the speed and professionalism of both the website and the centre means my transactions are done in less than 10 minutes."*

Negative perceptions of Service NSW are informed by:

- Going in store was a frustration for businesses, some needed to close shop to be able to visit a service centre and all felt that going in store was taking time away from their business
- Businesses were less patient than Consumers 20 min wait at Service NSW was seen as too long
- Found it challenging to find information that was relevant to their business on the SNSW Website.

*"Online did not meet my expectations **information provided was not up to mark**. Face to face conversation exceeded my expectations due to seamless and detailed information provided by the officials. Online has negative impact on my expectations due to lack of information in correct manner."*

Appendices

- [1. Background and methodological approach](#)
- [2. Further technical information](#)



Customer
Service
Commission



Appendix 1: Background and methodological approach



Background

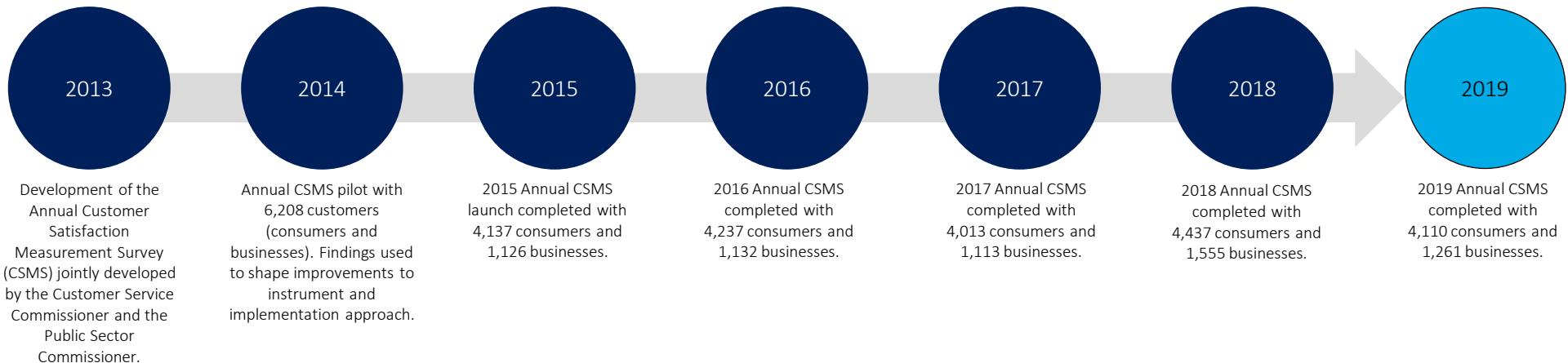
The Annual Customer Satisfaction Measurement Survey has been developed to support a continued focus on improving satisfaction with Government services.

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 2018 to 2019)
- 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 changes from 2018 to 2019 or year on year trends as specified in each legend.

Structure of the 2019 Annual Customer Satisfaction Measurement Survey

Sample Questions*

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

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

Planning, Industry & Environment
• Environment and wildlife protection
• Water Supply
• Agriculture advice and funding services
• Business Advisory Services

Justice

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

Health

- Public Hospitals
- Ambulance Services

Family & Community Services

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

Premier and Cabinet

- State owned art galleries and museums

Education

- Public Schools
- TAFE Services

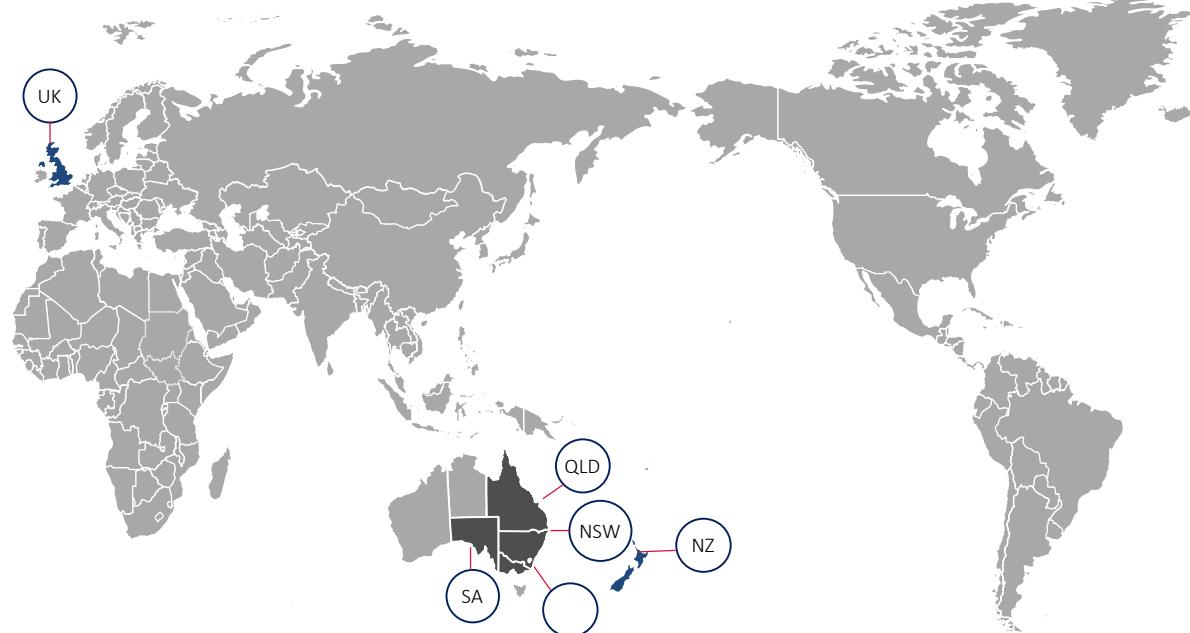
Approach to Data Collection and Jurisdictional Benchmarking

- Identical online surveys were undertaken with consumers and businesses in New South Wales, Victoria, Queensland, South Australia, New Zealand and United Kingdom to enable comparative cross-jurisdiction analysis.
- The survey was targeted to achieve a representative sample of the general population in each jurisdiction based on age, gender and region (metropolitan, regional and rural) and a representative sample of the business community based on location and size (number of employees). Service names were localised to ensure respondents selected appropriately.
- All surveys were completed over a consistent time period from **20 June 2019 to 10 July 2019** and results are therefore reflective of experiences with services across jurisdictions over the 12 months prior, from June 2018 – June 2019.
- Each respondent to the survey provided 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 sample profiles across each of the sample groups are outlined below, consistent with previous years:

2019 Survey Sample Size

Jurisdictions	Consumer (n=)	Business (n=)	Total (n=)
New South Wales	4,110	1,261	5,371
Queensland	2,019	555	2,574
Victoria	2,073	537	2,610
South Australia	1,998	502	2,500
United Kingdom	2,019	1,003	3,022
New Zealand	2,116	586	2,702



Additional Qualitative Research

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

OVERALL OBJECTIVES

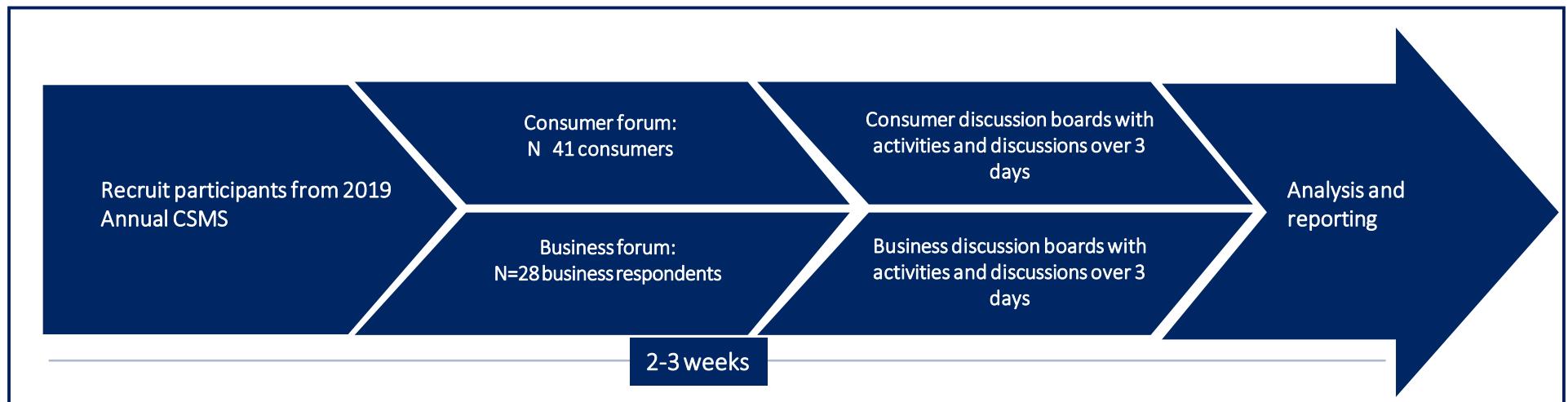
1

Provide additional insights, context, and colour at a **Whole of Government level**

2

Focus on a theme for deep-dive to provide additional insights

- Two online qualitative discussion forums were conducted for 2019 Annual CSMS, one for NSW consumers and one for NSW businesses.
- Participants were recruited from the 2019 Annual CSMS quantitative survey sample, providing representation across demographic and regional groups, as well as a variety of services dealt with.



NSW Customer Satisfaction Index

The Customer Satisfaction Index has increased for consumers and remained stable for businesses in 2019.

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 2019 is 80.6 out of 100 for consumers (an increase of 1.7 since 2018) and 77.6 out of 100 for businesses (remained stable since 2017). Refer to Figure 2.1.

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 2.2 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 exceeded.
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 2.1: Customer satisfaction index score for 2019

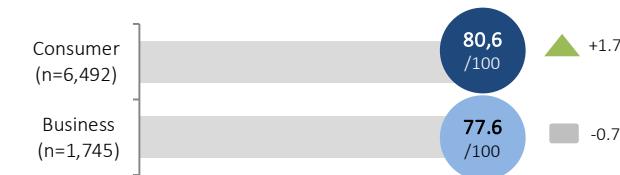
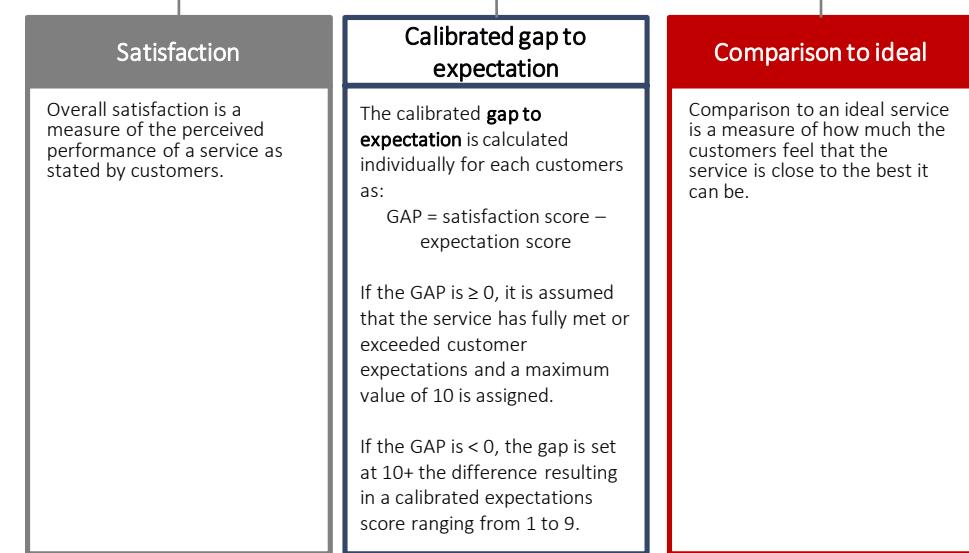


Figure 2.2: Customer satisfaction index methodology diagram

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 previous year (at 99% level of Confidence)
- ▬ No significant change in avg. from previous year (at 99% level of Confidence)
- ▼ Statistically significant decrease in avg. from previous year (at 99% level of Confidence)

Appendix II: 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.

Drafted sampling frame	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): <ul style="list-style-type: none">• Consumer by age, gender and region of residence (metropolitan, regional and rural)• Business by business size (estimated based on number of employees) and location (metropolitan, regional and rural)• Minimum targets were also set to achieve representativeness across government services of n=100 for NSW Consumer and n=50 for all other surveys.
Programmed and tested survey	<ul style="list-style-type: none">• A single dynamic survey was programmed for Queensland, NSW and VIC for each of business and consumer to optimise responses. Separate surveys were programmed for NZ and Canadian businesses and consumers.• 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.• Once the survey was programmed, rigorous testing was undertaken to ensure there were no breaks in the survey logic.• A survey usability review was also undertaken by a UX consultant to optimise visuals and ensure accessibility for all users.
Undertook a survey pilot	A survey pilot was undertaken over a 24 hour period and targeted to n=100 respondents to: <ul style="list-style-type: none">• Ensure there are no errors in the survey programming• Ensure we are yielding quality responses by checking:<ul style="list-style-type: none">• Quality of data entry and recording (e.g. respondents are providing considered responses, questions posed are applicable to the majority of respondents)• 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.• Results of the pilot revealed no errors in the survey and the survey was then progressed to full launch.
Daily monitoring of surveys while in field	<ul style="list-style-type: none">• 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.• For the Annual CSMS, every attempt is made to reach as much of the sample as possible for services that have lower sample sizes



Consumer Data Weighting and Cleaning Methodology

Consumers responses to the Customer Satisfaction Measurement Survey are weighted by age, gender and region to be representative of the NSW citizen population.

Responses to the survey have been weighted to correct for over-representation of particular segments to match known NSW resident population totals. Responses were each weighted based on the following demographics to approximate the target population:

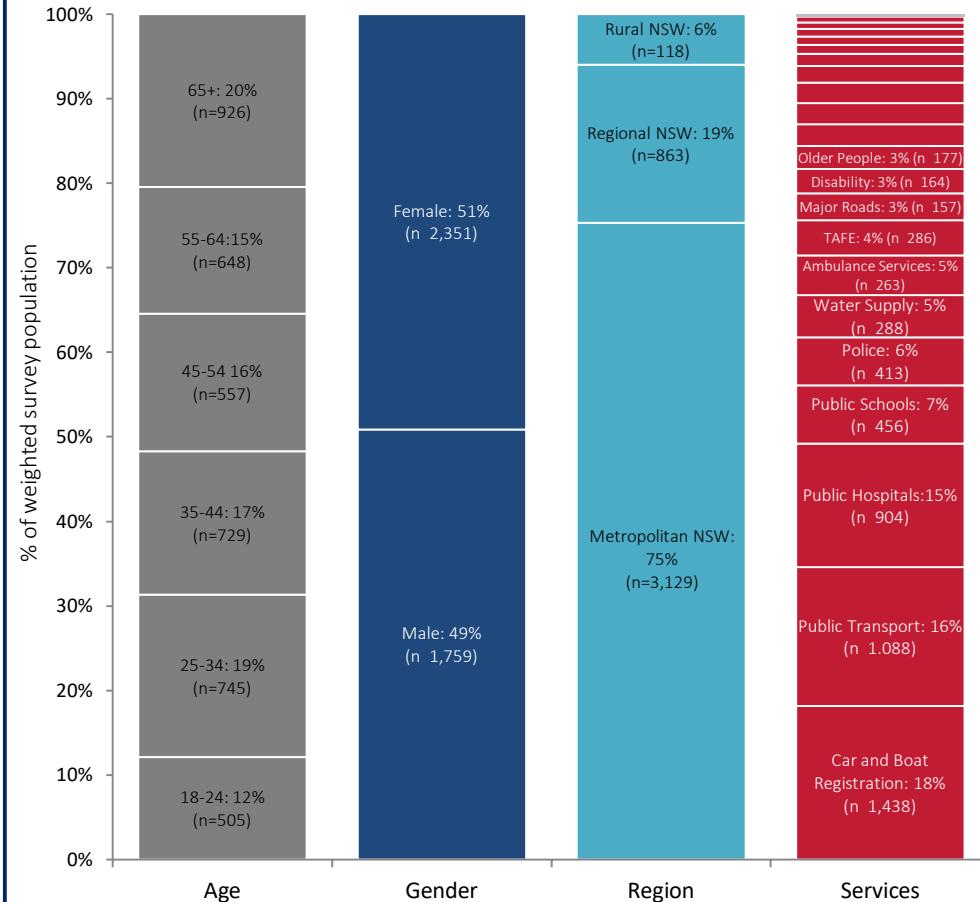
- Age and gender are based on the population of NSW residents (from ABS)
- Region based on the population of NSW residents who live in metropolitan NSW, Regional NSW and Rural NSW (from ABS)
- Aggregate scores across services have also been weighted according to the proportion of respondents who have interacted with this service in the last 12 months in an attempt to weight higher those services that consumers interact with more frequently

Consistent with previous years, the data files have been cleaned to remove:

- Incomplete and duplicate responses
- Speeders based on time taken (those who completed the survey in a time which was lower than 50% of the median length were removed from the database)
- Poor quality or junk responses for age or post code entries (ages of greater than 100 years were removed as were junk post code entries that could not be matched to a location within the jurisdiction)
- Respondents who attempted to enter the survey twice

Consumer surveys from other jurisdictions were cleaned and weighted in the same fashion as the NSW data with the relevant population statistics for each jurisdiction.

Figure 3.1: NSW consumer survey sample composition and weighting





Business Data Weighting and Cleaning Methodology

Businesses responses to Customer Satisfaction Measurement Survey are weighted by business location and size to be representative of the NSW business population.

Responses to the survey have been weighted to correct for over-representation of particular segments to match known NSW business population totals. Responses were each weighted based on the following demographics to approximate the target population:

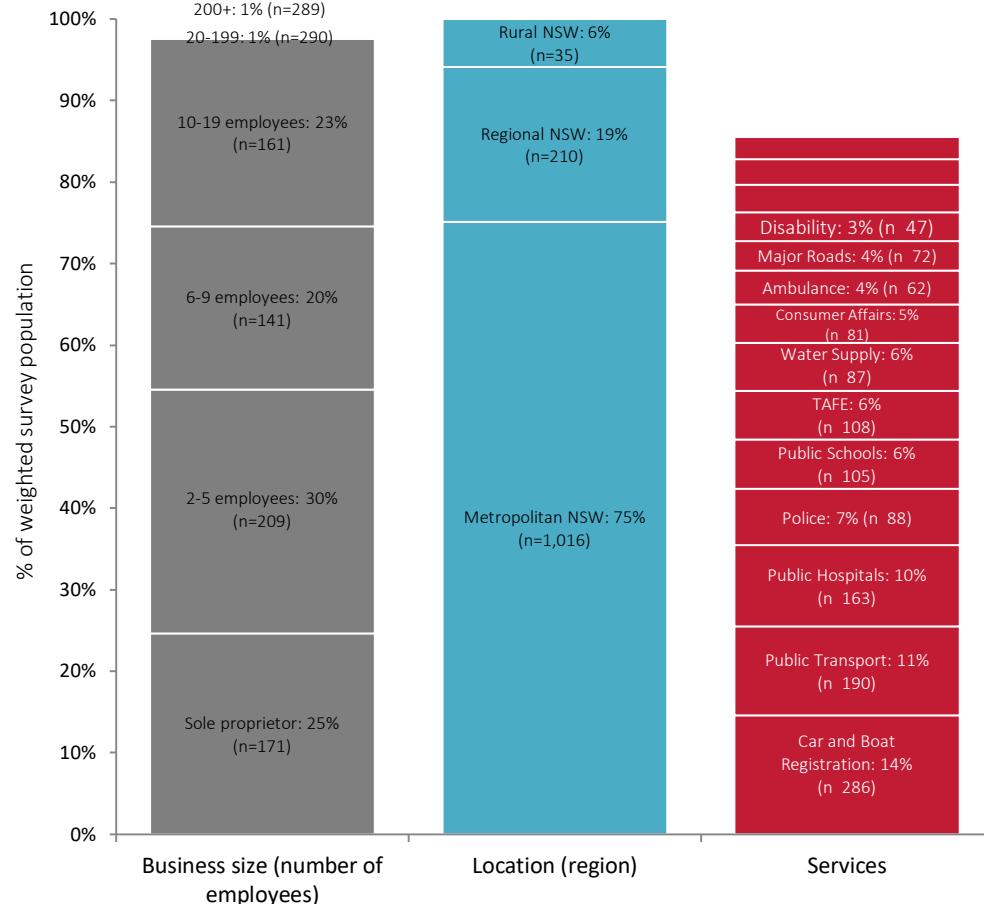
- Business size based on number of employees (from ABS)
- Location of business based on the population of NSW businesses which are based in metropolitan NSW, Regional NSW and Rural NSW (from ABS)
- Aggregate scores across services have also been weighted according to the proportion of respondents who have interacted with this service in the last 12 months in an attempt to weight higher those services which businesses interact with more frequently

Consistent with previous years and the approach to the consumer survey, the data files have been cleaned to remove:

- Incomplete and duplicate responses
- Speeders based on time taken (those who completed the survey in a time which was lower than 50% the median length were removed from the database)
- Poor quality or junk responses for age or post code entries (ages of greater than 100 years were removed as were junk post code entries that could not be matched to a location within the jurisdiction)
- Respondents who attempted to enter the survey twice

Business surveys from other jurisdictions were cleaned and weighted in the same fashion as the NSW data with the relevant population statistics for each jurisdiction.

Figure 3.2: NSW business survey sample composition and weighting





Satisfaction driver analysis methodology

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:

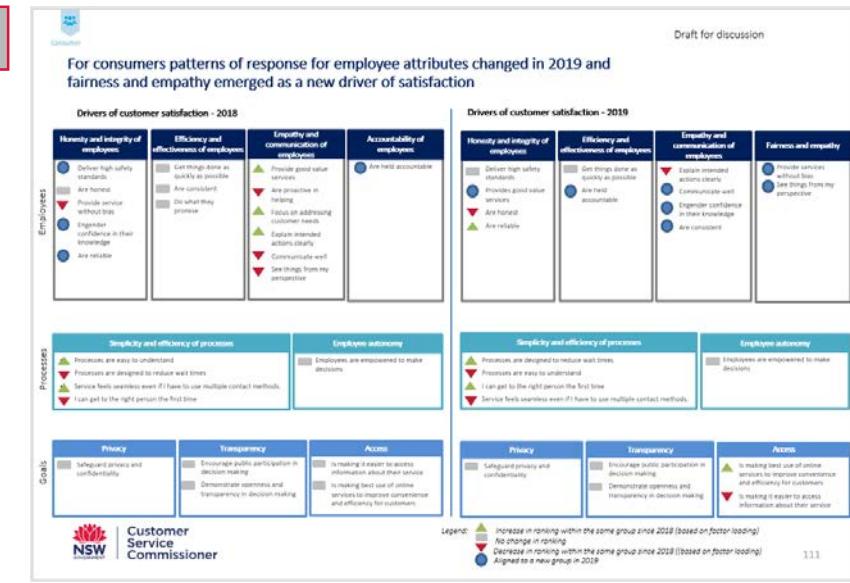
- Attributes within each of the outcome areas were analysed separately using a statistical methodology called Principle Components Analysis (PCA)
- Via PCA analysis, attributes were grouped into key customer experience components based on attributes that respondents rate similarly.

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: A similar approach is followed to identify satisfaction drivers for individual services. However, when sample sizes are small, analysis is replaced with a simpler approach of using correlation to infer importance

Step 1



Step 2



For consumers patterns of response for employee attributes changed in 2019 and fairness and empathy emerged as a new driver of satisfaction

Drivers of customer satisfaction - 2018

Honesty and integrity of employees	Efficiency and effectiveness of employees	Empathy and communication of employees	Accountability of employees
<ul style="list-style-type: none"> Deliver high safety standards Are honest Provide service without bias Engender confidence in their knowledge Are reliable 	<ul style="list-style-type: none"> Get things done as quickly as possible Are consistent Do what they promise 	<ul style="list-style-type: none"> Provide good value services Are proactive in helping Focus on addressing customer needs Explain intended actions clearly Communicate well See things from my perspective 	<ul style="list-style-type: none"> Are held accountable

Simplicity and efficiency of processes	Employee autonomy
<ul style="list-style-type: none"> Processes are easy to understand Processes are designed to reduce wait times Service feels seamless even if I have to use multiple contact methods. I can get to the right person the first time 	<ul style="list-style-type: none"> Employees are empowered to make decisions

Privacy	Transparency	Access
<ul style="list-style-type: none"> Safeguard privacy and confidentiality 	<ul style="list-style-type: none"> Encourage public participation in decision making Demonstrate openness and transparency in decision making 	<ul style="list-style-type: none"> Is making it easier to access information about their service Is making best use of online services to improve convenience and efficiency for customers

Drivers of customer satisfaction - 2019

Honesty and integrity of employees	Efficiency and effectiveness of employees	Empathy and communication of employees	Fairness and empathy
<ul style="list-style-type: none"> Deliver high safety standards Provides good value services Are honest Are reliable 	<ul style="list-style-type: none"> Get things done as quickly as possible Are held accountable 	<ul style="list-style-type: none"> Explain intended actions clearly Communicate well Engender confidence in their knowledge Are consistent 	<ul style="list-style-type: none"> Provide services without bias See things from my perspective

Simplicity and efficiency of processes	Employee autonomy
<ul style="list-style-type: none"> Processes are designed to reduce wait times Processes are easy to understand I can get to the right person the first time Service feels seamless even if I have to use multiple contact methods. 	<ul style="list-style-type: none"> Employees are empowered to make decisions

Privacy	Transparency	Access
<ul style="list-style-type: none"> Safeguard privacy and confidentiality 	<ul style="list-style-type: none"> Encourage public participation in decision making Demonstrate openness and transparency in decision making 	<ul style="list-style-type: none"> Is making best use of online services to improve convenience and efficiency for customers Is making it easier to access information about their service



For consumers, employee and goal related drivers are of highest relative importance, followed by process related attributes

Overall drivers of satisfaction: Statistical analysis of the drivers of overall satisfaction¹ with NSW Government services reveals that ‘efficiency and effectiveness of staff’ and ‘access to information and online services’, have the highest impact on overall customer satisfaction.

Employee Attributes:

- High Importance: Efficiency and effectiveness of employees and honesty and integrity.
- Moderate Importance: Fairness and empathy and communication.

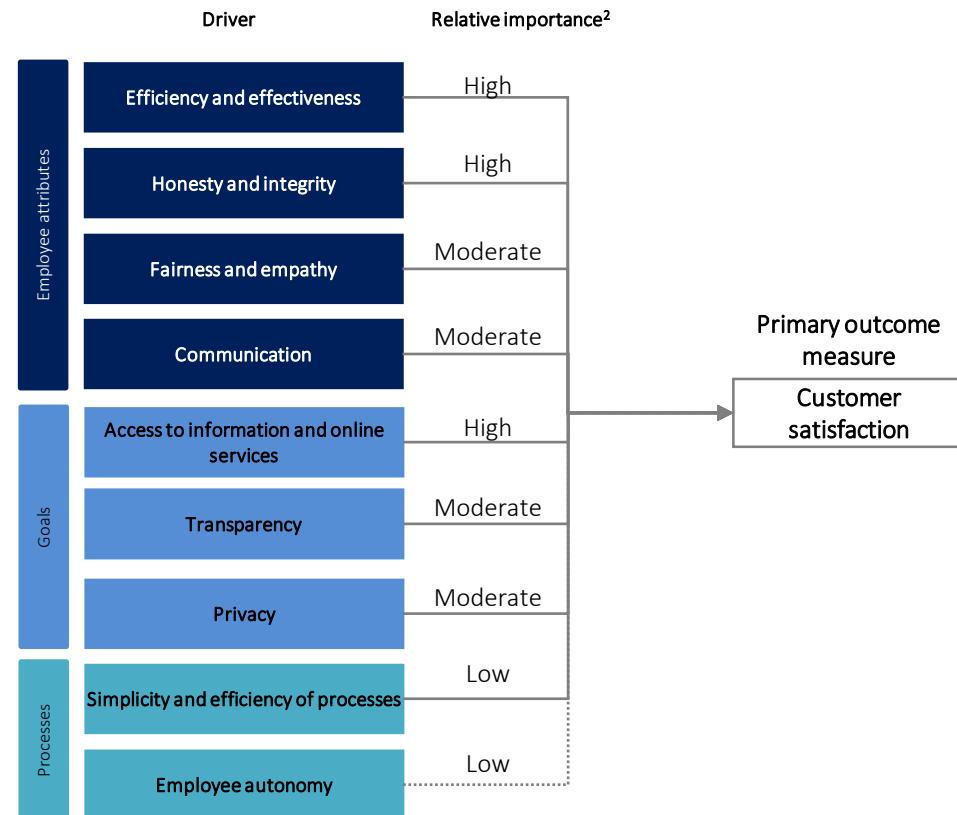
Goals Attributes:

- High Importance: Access to information and online services.
- Moderate Importance: Transparency and Privacy.

Process Attributes:

- Low Importance: Simplicity and efficiency of processes and employee autonomy.

Figure 3.4: Relative importance of drivers of satisfaction with NSW Government services



¹Note 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 previous years.

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



Businesses satisfaction is driven by employees processes, which have the highest relative importance

Overall drivers of satisfaction: Through statistical analysis of overall satisfaction with NSW Government services it has been identified that the strongest drivers for business satisfaction are ‘efficiency and effectiveness’, ‘honesty and integrity’ and ‘empathy and communication’. The perception of processes is less important for businesses than consumers indicating that both groups value different things when interacting with NSW Government services.

Employee Attributes:

- High Importance: Efficiency and effectiveness of employees, honesty and integrity and empathy and communication.
- Moderate Importance: Fairness.

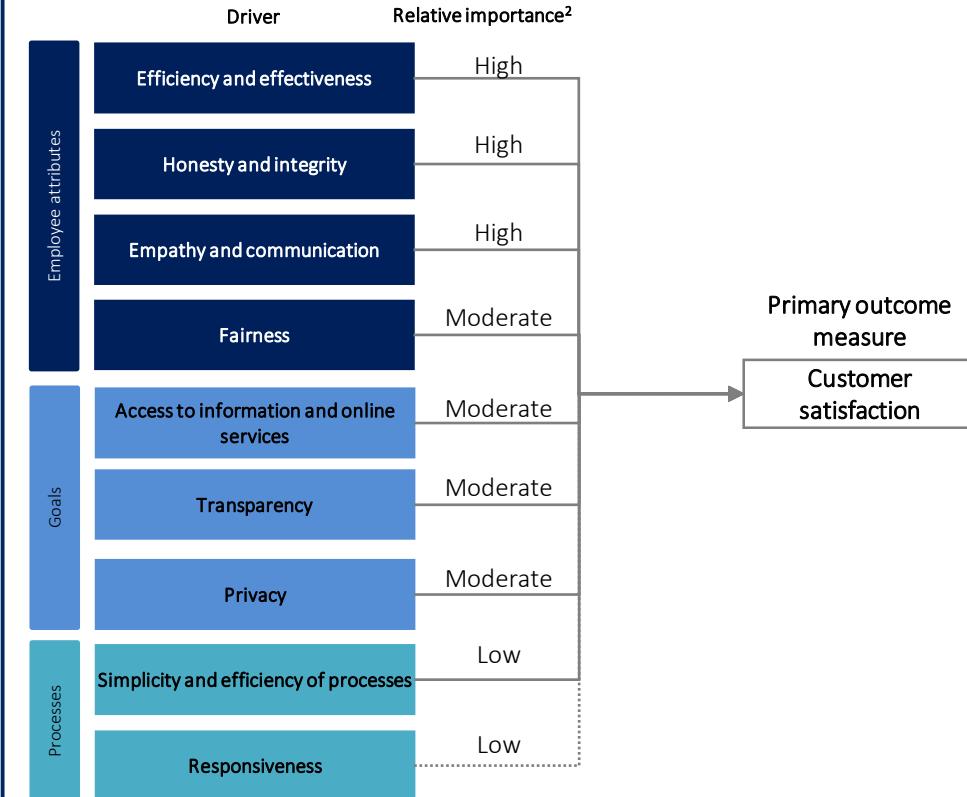
Goals Attributes:

- Moderate Importance: Access to information and online services, transparency and privacy.

Process Attributes:

- Low Importance: Simplicity and efficiency of processes and responsiveness.

Figure 3.5: Relative importance of drivers of satisfaction with NSW Government services



¹Note 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 previous years.

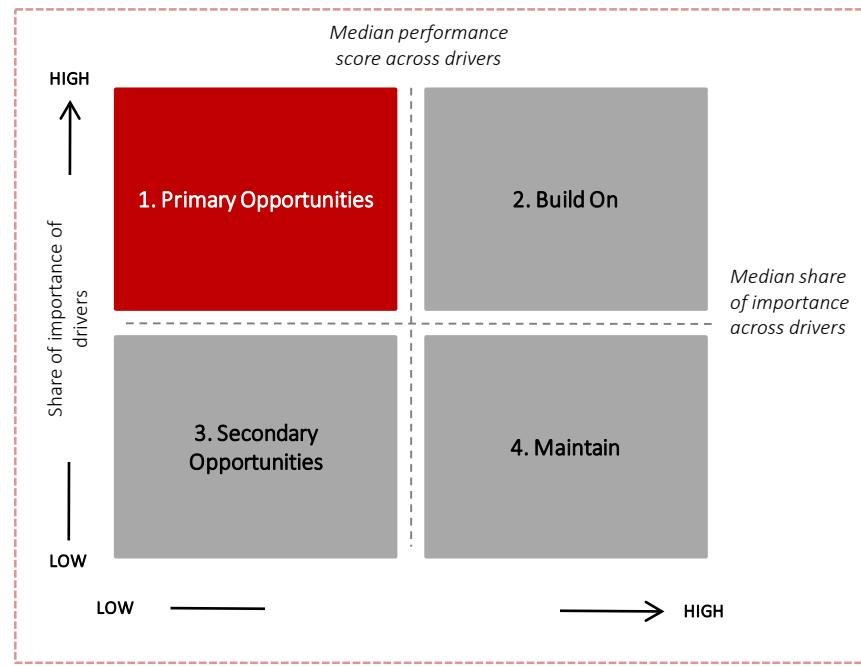
²Note: Calculation of drivers is based on the statistical analysis of drivers against satisfaction. Hierarchy represents the relative ‘importance’ of factors on overall satisfaction.

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 a 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.



Margin of Error Calculation

- The margin of error (MoE) refers to a measurement for calculating the amount of sampling error in survey responses – in this case, the error between the results acquired from customers who responded to the survey and the results that would be achieved if the entire population of businesses/consumers who had interacted with NSW Government services was surveyed.
- MoE calculations are performed across all comparison analyses using a 1% MoE (99% confidence level) for Annual CSMS and 5% MoE (95% confidence level) for QPCS – this means, we can say with 99% (for CSMS) and 95% (for QPCS) confidence that the result if all customers are surveyed lies within the margin of error around the survey result. In interpreting MoE, this report aligns with practices of the Australian Bureau of Statistics (ABS), which states:
 - Less than 10% MoE is fit for general use (the 1%/5% MoE used is therefore very robust for general use)
 - Between 11-25% should be used with caution
 - Between 26-50% is subject to sampling variability too high for most practical purposes, and
 - Over 50% is considered too unreliable for general use.
- Understanding the MoE is particularly important when comparing data across years to determine if there has been a significant change in performance measures.
- The formula for calculating the margin of error on a survey sample proportion is as follows:
- Margin of error on a population proportion = $CI * \sqrt{\frac{x\%(1-x\%)}{N-n}}$
- Margin of error on an average or mean score (+/- mean) = $Z * \frac{\sigma}{\sqrt{n}}$
- Where:
 - CI is the confidence interval (1.96 for a 95% level of confidence and 2.58 for a 99% level of confidence)
 - x% is the sample proportion
 - σ is the standard deviation on the score
 - N is the size of the population
 - n is the sample size.
- An example calculation is provided below:
 - The margin of error on the proportion of consumers in 2015 who are dissatisfied with an example service overall, based on a 5% level of confidence and a sample size of 1,096 is +/- 3%. Therefore, we can say, with 95% certainty that the true proportion of dissatisfied customers lies between +/-3% of the reported value of 41% (between 38% - 44%)
 - The margin of error on the proportion of consumers in 2014 who are dissatisfied with the same example service overall, based on a 95% level of confidence and a sample size of 836 is +/- 3%. Therefore, we can say, with 95% certainty that the true proportion of dissatisfied customers lies between +/-3% of the reported value of 50% (between 47% - 53%)
 - Comparing the two results, we can say with a 95% level of confidence, that the proportion of dissatisfied customers has significantly decreased in 2015 from 2014 as movement is outside the margin of error (i.e. the highest likely proportion of dissatisfied customers across the total customer base in 2015 is 44% which is lower than the possible lowest proportion of dissatisfied customers in 2014 of 47%).



**Customer
Service
Commission**