2020 NSW Customer Satisfaction Measurement Survey top-line results

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NSW GOVERNMENT | Customer Service

Overview of 2020 NSW Customer Satisfaction Measurement Survey (CSMS) results

Consumer results

Customer Satisfaction Index

82.0 ▲+1.4

- Consumer CSI **increased significantly** from 2019.
- Significant increase in consumer satisfaction and stable consumer expectations have contributed to this result.

Effort

5.6 ▼-0.3

- Consumer effort to deal with NSW Government services has made a positive shift, **declining significantly**.
- NSW ranks **second** when benchmarked against three other Australian jurisdictions.

Trust

7.8 ● +0.1

- Consumer trust in NSW Government services remains **stable**.
- NSW ranks **first** when benchmarked against three other Australian jurisdictions.

NSW Public Service brand

7.3 ▲+0.2

- Consumers' perception of the NSW Public Service has **increased significantly**, ranking first compared to other industries.

Business results

Customer Satisfaction Index

80.7 ▲+3.1

- Business CSI has **increased significantly** for the first time since 2016.
- Significant increase in business satisfaction and stable business expectations have contributed to this result.

Effort

6.3 ● -0.1

- Businesses' effort to deal with NSW Government services remains **stable**.
- NSW ranks **third** when benchmarked against three other Australian jurisdictions.

Trust

7.7 ▲+0.3

- Business trust in NSW Government services has **increased significantly**.
- NSW has taken the **lead** for business trust when benchmarked against three other Australian jurisdictions.

NSW Public Service brand

7.3 ▲+0.4

- Businesses' perception of the NSW Public Service has **increased significantly**, ranking first compared to other industries.

▲▼ Statistically significant increase / decrease in avg. from previous year (at 99% level of Confidence). For effort, a decrease is positive. ● No significant change in avg. from previous year (at 99% level of Confidence)

From 2015-2020, the CSMS has provided a robust whole-of-government measurement of customer experience with NSW Government services

The CSMS…

Is conducted annually online with a representative sample of:

Consumers (based on age, gender, region)	Businesses (based on location and size)
NSW: ~4000	NSW: ~1000
Other jurisdictions: ~2000	Other jurisdictions: ~500

Tracks 22 government services against:

- Satisfaction
- Expectation
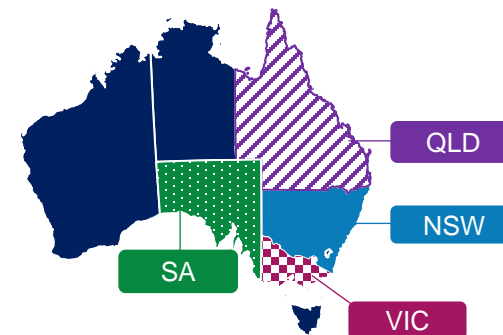- Comparison to ideal
- Trust
- Effort

Respondents rate 1-2 government services used over the past 12 months

In 2020, the CSMS was…

Reflective of previous 12 months:

Surveys were completed between **21 July to 17 August 2020** to reflect experiences from **July 2019 – July 2020**

Conducted in:*

Jurisdictions	Consumer (n=)	Business (n=)
NSW	4023	992
QLD	2011	504
VIC	2024	505
SA	1995	484

QLD

NSW

SA

VIC

*Two international jurisdictions were captured in the survey from 2015-2019, from either the United Kingdom, Canada or New Zealand. In 2020 only Australian jurisdictions have been captured.
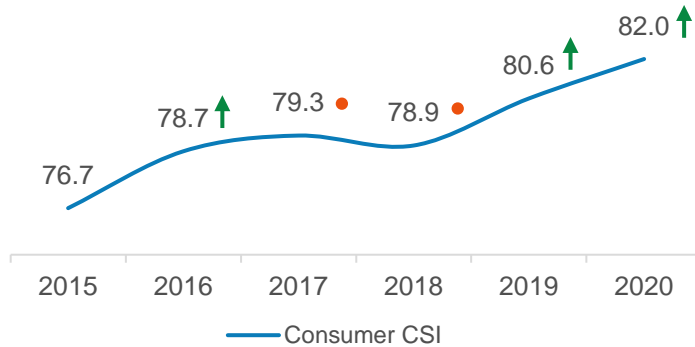
2020 NSW CSMS results: **Consumer**

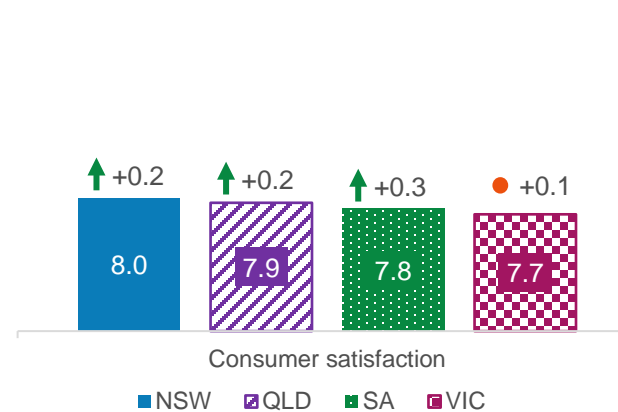# Consumers' overall experience with NSW Government services continues to rise

Consumer: NSW Customer Satisfaction Index (CSI)

CSI is a combination of satisfaction, expectation and comparison to ideal service

Values shown: 76.7, 78.7 ↑, 79.3 ●, 78.9 ●, 80.6 ↑, 82.0 ↑ across years 2015–2020
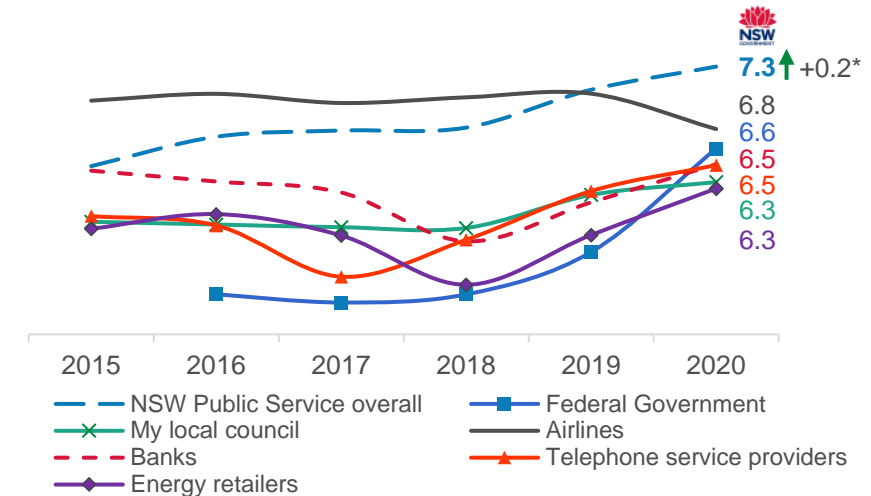
— Consumer CSI

Source: CSMS 2015-2020 – consumer results. Scores subject to rounding. The CSI 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 rebalanced to be on a scale of 0 to 100. Each individual score is the averaged across the total population to provide a WofG measure.

Consumer: comparison of satisfaction across jurisdictions

Bar values: NSW 8.0 (+0.2 ↑), QLD 7.9 (+0.2 ↑), SA 7.8 (+0.3 ↑), VIC 7.7 (+0.1 ●)

Consumer satisfaction

■ NSW ▨ QLD ▨ SA ▨ VIC

Source: CSMS 2020 – consumer results. Scores out of 10 and subject to rounding. Q3.1. Thinking about your experiences in the last 12 months, how satisfied would you say you are with each of the following services in [state]? [1 = very dissatisfied; 10 = very satisfied]

Consumer brand perceptions of NSW industries and public service

Values: 7.3 ↑ +0.2*, 6.8, 6.6, 6.5, 6.5, 6.3, 6.3

- - - NSW Public Service overall   ■ Federal Government
─✕─ My local council   ─── Airlines
- - - Banks   ─▲─ Telephone service providers
─♦─ Energy retailers

Source: CSMS 2015-2020 – consumer results. Scores out of 10 and subject to rounding Q6.2. Thinking about all your experiences with each of the following NSW industries and public services over the previous 12 months, how satisfied would you say you are with them? [1 = very dissatisfied; 10 = very satisfied].

Insight

- While expectation with government services has remained stable, satisfaction has increased closer to expectation levels. This has contributed to a significant increase in the CSI.

- NSW continues to lead other jurisdictions in consumer satisfaction

- NSW Public Service brand perception has improved significantly over the past 2 years

↑↓ Statistically significant increase / decrease in avg. from previous year (at 99% level of Confidence).
● No significant change in avg. from previous year (at 99% level of Confidence).

*Statistical significance is only reported for 'Public Service Overall' for the purpose of this report

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Consumer effort when interacting with NSW Government services has decreased significantly
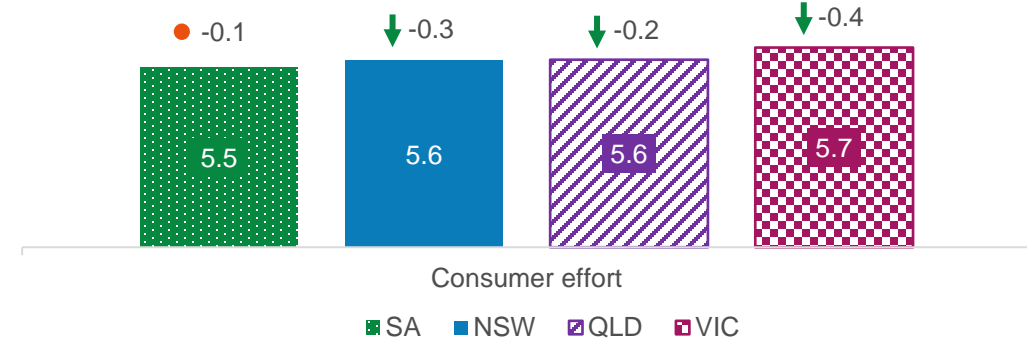
Consumer effort to deal with NSW Government services
A lower score is better

2017	2018	2019	2020
5.9	6.0 +0.1	5.9 -0.1	5.6 ↓ -0.3
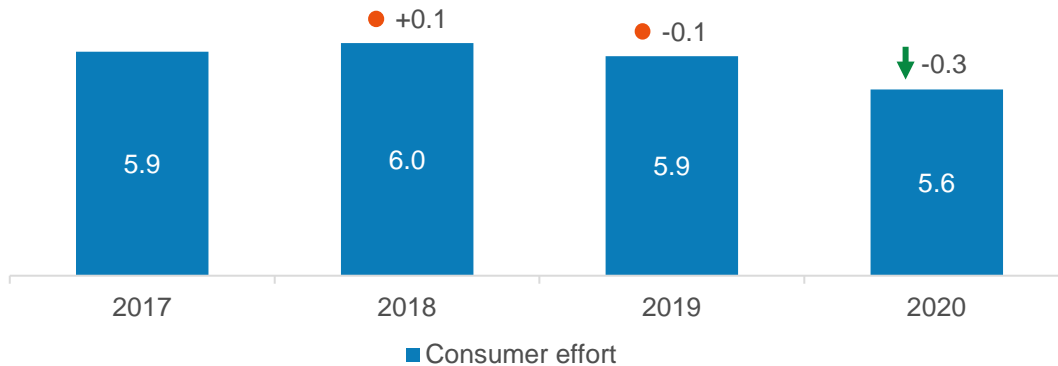
■ Consumer effort

Source: CSMS 2017-2020 - consumer results. Score is out of 10 and subject to rounding.

Jurisdictional comparison of consumer effort to deal with government services
A lower score is better

SA	NSW	QLD	VIC
5.5 ● -0.1	5.6 ↓ -0.3	5.6 ↓ -0.2	5.7 ↓ -0.4

Consumer effort

■ SA ■ NSW ▨ QLD ▨ VIC

Source: CSMS 2020 - consumer results. Score is out of 10 and subject to rounding.

Insight
- NSW has moved from third to second rank for consumer effort – a positive shift

Q4.0 Thinking now about your direct dealings with [state] [service], how much effort did you personally have to put forth? [1 = very low effort; 10 = very high effort]. Effort was measured for the first time in 2017.
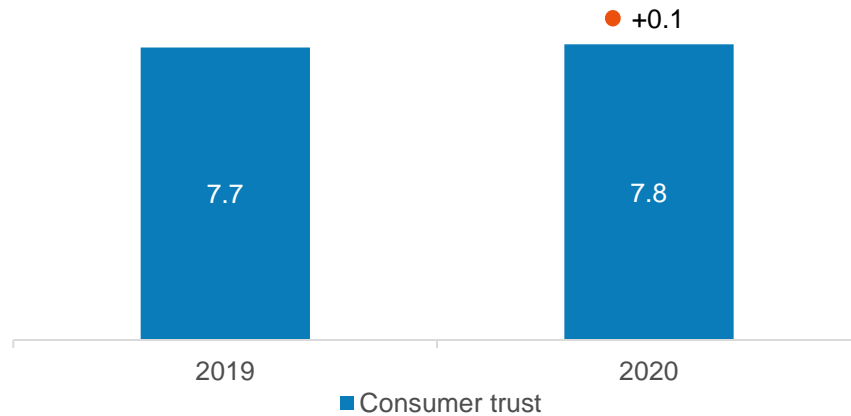
↑↓ Statistically significant increase / decrease in avg. from previous year (at 99% level of Confidence). For effort, a decrease is positive.
● No significant change in avg. from previous year (at 99% level of Confidence).

Consumers continue to have high trust in NSW Government services

Consumers' trust in NSW Government services

● +0.1

2019	2020
7.7	7.8

■ Consumer trust

Source: CSMS 2019-2020 - consumer results. Score is out of 10 and subject to rounding.

Jurisdictional comparison of consumers' trust in government services

● +0.1   ↑ +0.1   ↑ +0.2   ● -0.1

NSW	QLD	SA	VIC
7.8	7.8	7.7	7.6

Consumer trust

■ NSW ▨ QLD ▨ SA ▨ VIC

Source: CSMS 2020 - consumer results. Score is out of 10 and subject to rounding.

Insight

- Consumer trust in NSW Government services has remained stable
- NSW continues to rank first for trust in government services

Q3.3. Please indicate how much you trust the following services in [state] to do what is right? [1 = Do not trust them at all; 10 = trust them a great deal]. Trust was measured for the first time in 2019.

↑↓ Statistically significant increase / decrease in avg. from previous year (at 99% level of Confidence).
● No significant change in avg. from previous year (at 99% level of Confidence).

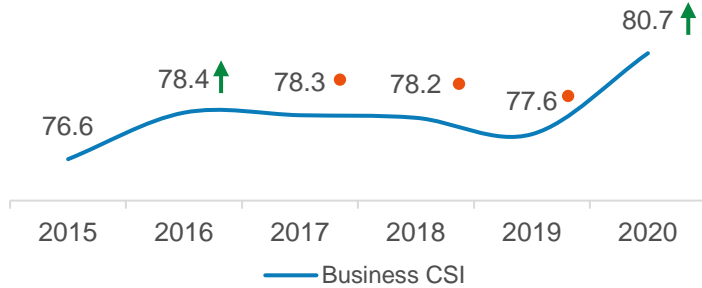# 2020 NSW CSMS results: **Business**

Businesses' overall experience with NSW Government services has improved significantly

Business: NSW Customer Satisfaction Index (CSI)

CSI is a combination of satisfaction, expectation and comparison to ideal service

76.6　78.4　78.3　78.2　77.6　80.7

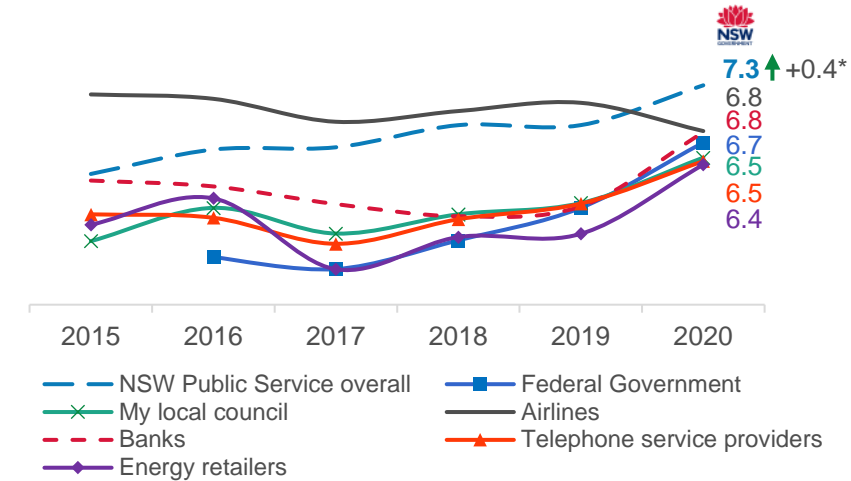2015　2016　2017　2018　2019　2020

— Business CSI

Source: CSMS 2015-2020 – business results. Scores subject to rounding. The CSI 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 rebalanced to be on a scale of 0 to 100. Each individual score is the averaged across the total population to provide a WofG measure.

Business: comparison of satisfaction across jurisdictions

+0.3　+0.3　+0.4　-0.0

7.7　7.6　7.5　7.5

Business satisfaction

■ NSW　■ SA　■ VIC　■ QLD
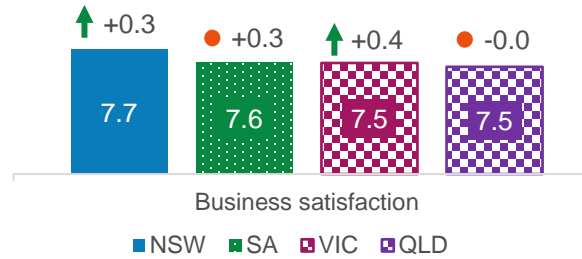
Source: CSMS 2020 – business results. Scores out of 10 and subject to rounding. Q3.1. Thinking about your experiences in the last 12 months, how satisfied would you say you are with each of the following services in [state]? [1 = very dissatisfied; 10 = very satisfied].

Business brand perceptions of NSW industries and public service

7.3 +0.4*
6.8
6.8
6.7
6.5
6.5
6.4

2015　2016　2017　2018　2019　2020

- - - NSW Public Service overall　■ Federal Government
— My local council　— Airlines
- - - Banks　— Telephone service providers
— Energy retailers

Source: CSMS 2020 – business results. Q6.2. Thinking about all your experiences with each of the following NSW industries and public services over the previous 12 months, how satisfied would you say you are with them? [1 = very dissatisfied; 10 = very satisfied].

Insight

- While expectation with government services has remained stable, satisfaction has increased closer to expectation levels. This has contributed to a significant increase in the CSI.

- NSW ranks first for business satisfaction, overtaking QLD which was leading in 2019

- NSW Public Service brand perception has improved significantly, with NSW leading other industries

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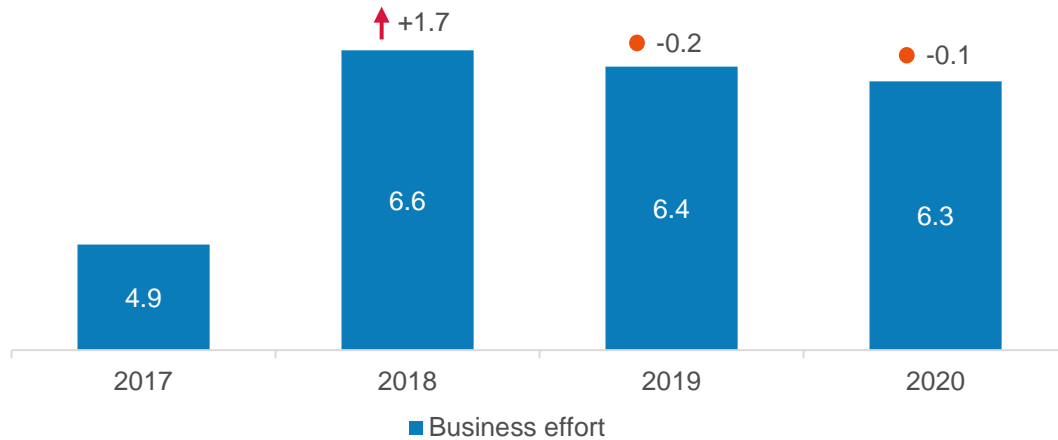No significant change in avg. from previous year (at 99% level of Confidence).

*Statistical significance is only reported for 'Public Service Overall' for the purpose of this report

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Businesses' effort to deal with NSW Government services is stable

## Business effort to deal with NSW Government services
A lower score is better

2017	2018	2019	2020
4.9	↑ +1.7 / 6.6	● -0.2 / 6.4	● -0.1 / 6.3

■ Business effort

Source: CSMS 2017-2020 – business results. Scores is out of 10 and subject to rounding.

Jurisdictional comparison of business effort to deal with government services
A lower score is better

SA	QLD	NSW	VIC
● -0.1 / 6.1	● -0.1 / 6.3	● -0.1 / 6.3	● -0.1 / 6.5

Business effort

■ SA ▨ QLD ■ NSW ▨ VIC
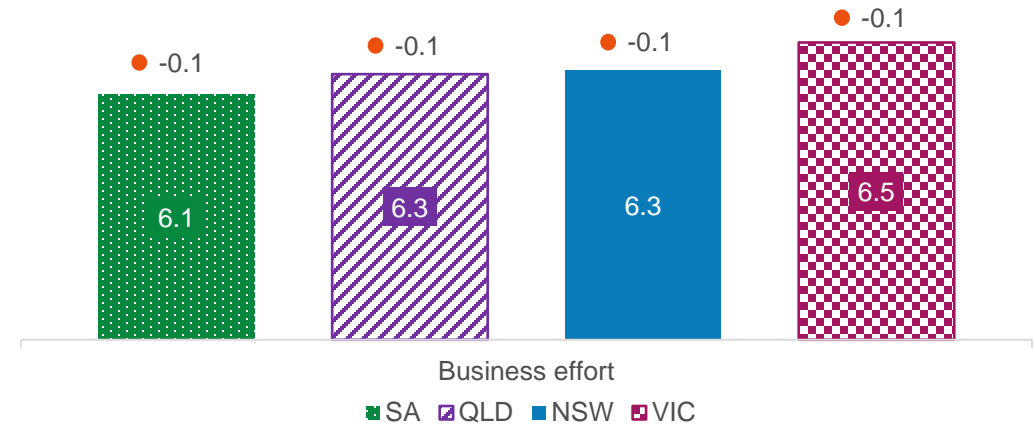
Source: CSMS 2020 - business results. Score is out of 10 and subject to rounding.

Insight

- NSW continues to rank third for business effort

Q4.0 Thinking now about your direct dealings with [state] [service], how much effort did you personally have to put forth? [1 = very low effort; 10 = very high effort]. Effort was measured for the first time in 2017.
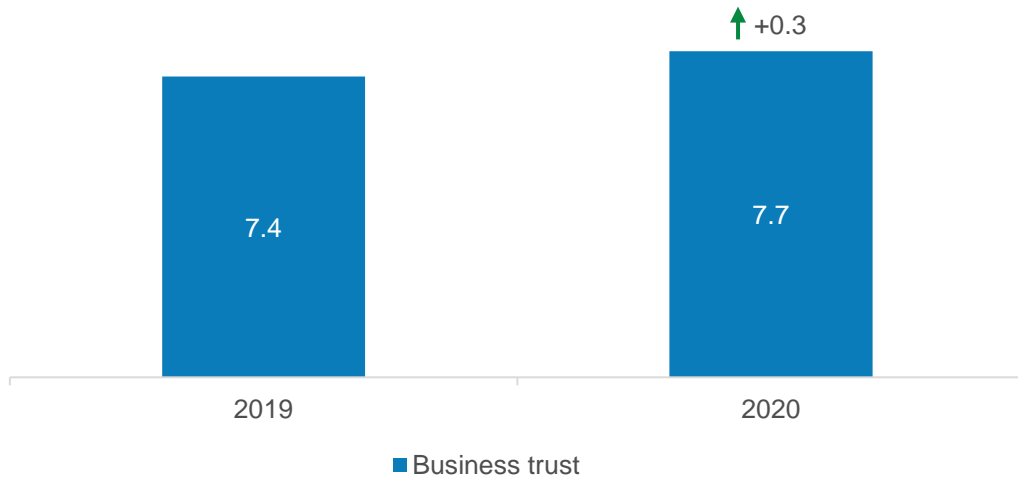
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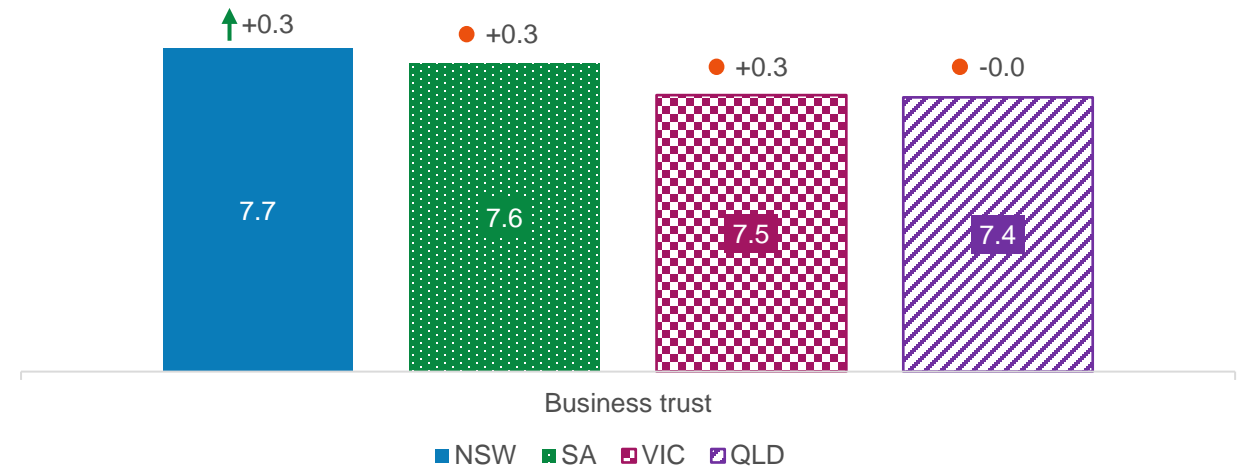
Businesses' trust in NSW Government services has increased significantly since last year

Business trust in NSW Government services

↑ +0.3

2019	2020
7.4	7.7

■ Business trust

Source: CSMS 2019-2020 – business results. Score is out of 10 and subject to rounding.

Jurisdictional comparison of businesses' trust in government services

↑ +0.3   **● +0.3**   **● +0.3**   **● -0.0**

NSW	SA	VIC	QLD
7.7	7.6	7.5	7.4

Business trust

■ NSW ■ SA ▨ VIC ▨ QLD

Source: CSMS 2020 - business results. Score is out of 10 and subject to rounding.

Insight

- NSW has moved from second to first rank for business trust in government services

Q3.3. Please indicate how much you trust the following services in [state] to do what is right? [1 = Do not trust them at all; 10 = trust them a great deal]. Trust was measured for the first time in 2019.

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