

2020 Annual Customer Satisfaction Measurement Survey



Customer
Service



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I. Executive Summary

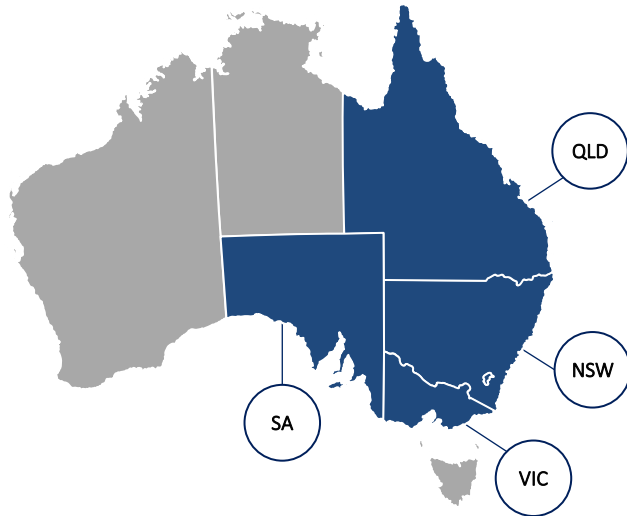
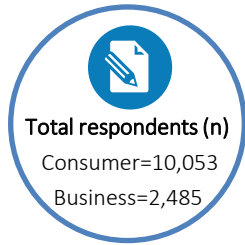


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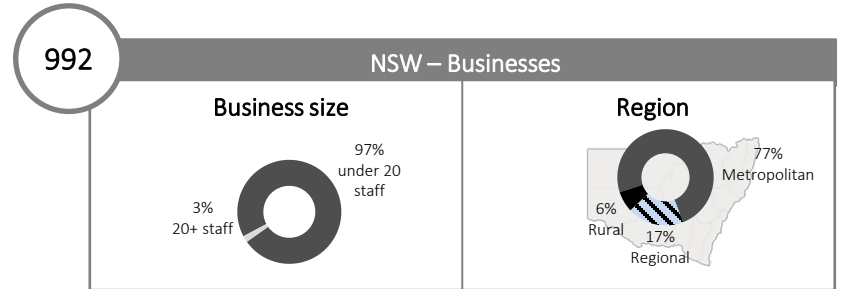
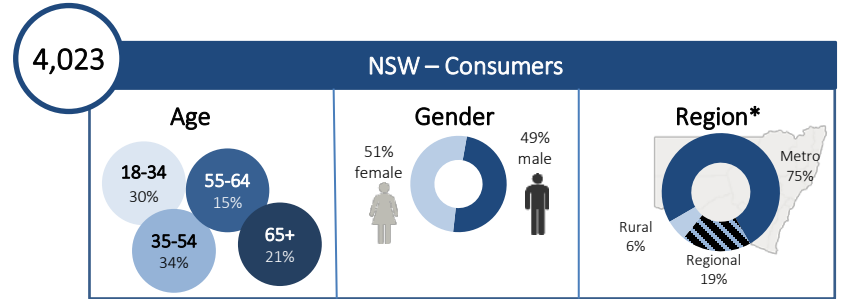




The 2020 Annual Customer Satisfaction Measurement Survey included over 10,000 consumers and 2,400 businesses across 4 jurisdictions



Respondent Demographics



Other jurisdictions - Consumers

Jurisdiction	Count
Queensland	2,011
Victoria	2,024
South Australia	1,995

Other jurisdictions - Businesses

Jurisdiction	Count
Queensland	504
Victoria	505
South Australia	484

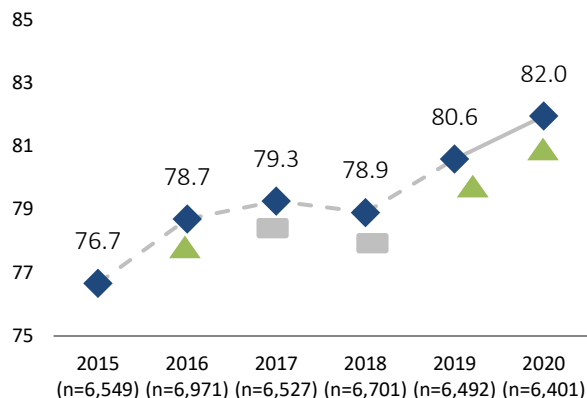
*Regions defined as per ABS post code remoteness classification



Executive summary: Consumers' satisfaction and brand perception of NSW Government services has improved significantly in 2020, compared to previous years

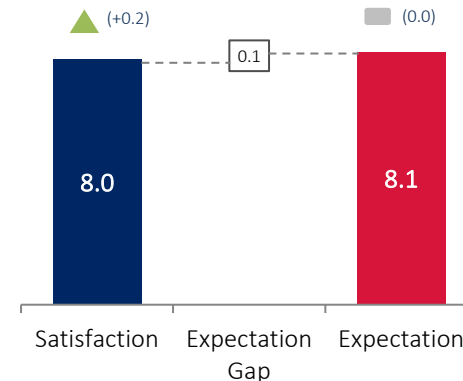
Customer Satisfaction Index (CSI) results

The NSW consumer CSI has increased significantly in 2020 to 82.0 compared to 80.6 in 2019



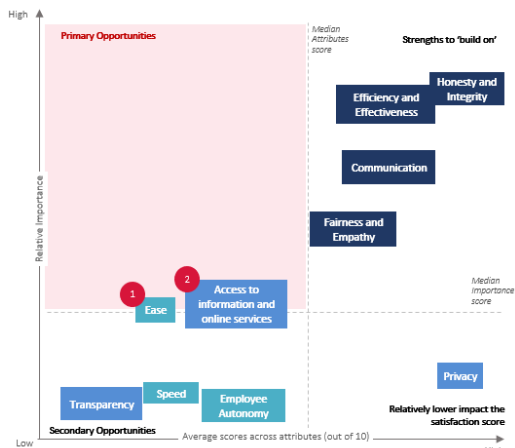
Performance of NSW Government services against baseline measures

Consumer satisfaction has increased significantly and expectation has remained stable thereby closing the expectation gap from 0.3 points in 2019 to 0.1 points in 2020



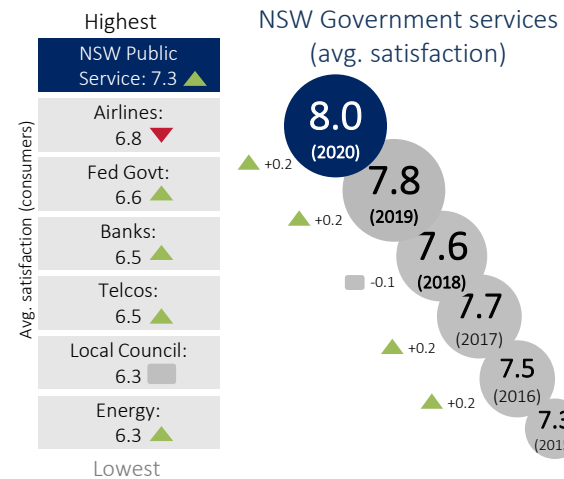
Key Primary Opportunity Areas

'Ease' of processes and 'Access to information and online services' are identified as the primary focus areas to drive an increase in consumer satisfaction with NSW Government services



Perceptions of the NSW Public Sector 'brand'

Consumer perceptions of the NSW Public Service 'brand' have improved significantly in 2020, leading all other industries. However, the average satisfaction score with the 'brand' remains lower than average satisfaction score with service experience indicating a gap in the experiences of consumers in dealing with NSW Government services and their perception of NSW Public Service overall



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)



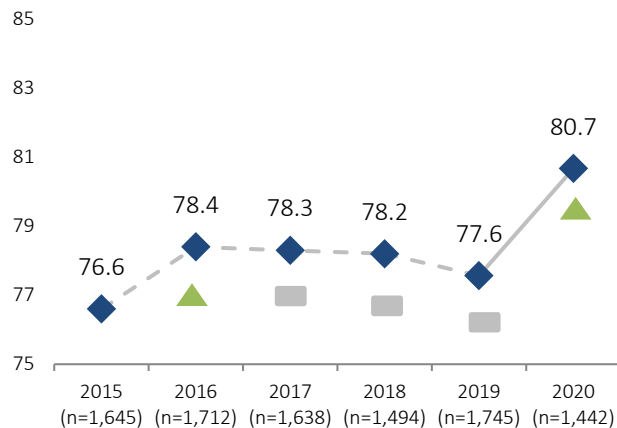
Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

Executive summary: Business satisfaction and brand perceptions of NSW Government services have also improved significantly in 2020

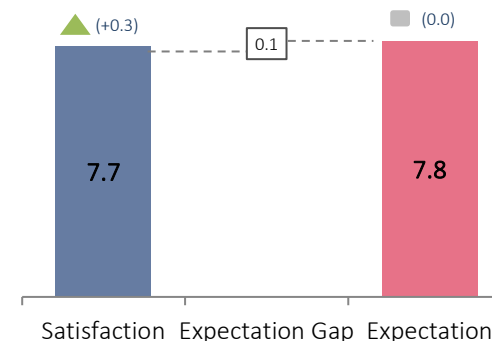
Customer Satisfaction Index (CSI) results

The NSW business CSI has increased significantly from 77.6 in 2019 to 80.7 in 2020



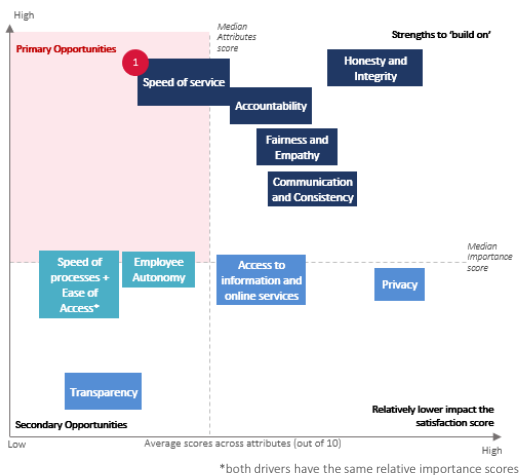
Performance of NSW Government services against baseline measures

Business satisfaction has increased significantly and expectation has remained stable thereby closing the expectation gap from 0.4 points in 2019 to 0.1 points in 2020



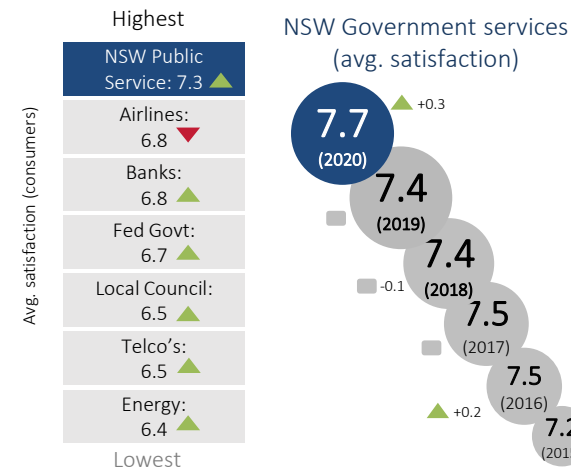
Key Primary Opportunity Areas

'Speed of service' from employees is identified as a primary opportunity area in 2020 to drive an increase in business satisfaction with NSW Government services. 'Speed of processes' has been identified as a secondary opportunity area



Perceptions of the NSW Public Sector 'brand'

Business perceptions of the NSW 'brand' have increased significantly in 2020, leading all other industries. However, the average satisfaction score with the 'brand' is lower than the average satisfaction score with the service experience indicating a gap in the experiences of businesses in dealing with NSW Government services and their perception of NSW Public Service overall



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

II. Key Findings



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Summary of Key Findings

CSI and Outcome Measures

Key Findings	Evidence
<p>Consumers' overall satisfaction with NSW Government services has improved significantly compared to 2019</p>	<ul style="list-style-type: none"> • While consumer expectations have remained stable at 8.1/10, satisfaction with NSW Government services has increased significantly from 7.8/10 in 2019 to 8.0/10 in 2020, contributing to a narrowing of the expectation gap and a significantly higher CSI of 82.0 in 2020 • Comparison to ideal score for consumers has remained relatively stable at 7.5/10 in 2020 • NSW leads other jurisdictions (VIC, QLD and SA) in satisfaction and expectation with scores of 8.0/10 and 8.1/10 respectively • Consumer effort in dealing with NSW Government services has also shown a positive shift, declining significantly from 5.9/10 in 2019 to 5.6/10 in 2020 • Consumer trust in NSW Government services has remained stable at 7.8/10 with NSW having the highest score across jurisdictions





Summary of Key Findings

Drivers of Satisfaction and Service Attributes

Key Findings	Evidence
<p>Consumers’ perceptions of NSW Government services in relation to processes, goals, values and employee attributes have improved significantly compared to 2019</p>	<ul style="list-style-type: none"> • Compared to 2019, scores for 11 of the 12 employee attributes have improved significantly • Employee attributes ‘are honest’ and ‘deliver high safety standards’ have the highest scores of 8.0/10 for both • While process related attributes have the lowest average score of 7.1/10, it is an improvement from the 2019 score of 6.9/10 • Consistent with 2019, ‘Encourage public participation in decision making’, a goal related attribute, continues to have the lowest score of 6.5/10 in 2020
<p>‘Ease’ of processes and ‘access to information and online services’ are identified as the primary focus areas to drive an increase in consumer satisfaction with NSW Government services, as they have a high relative importance to consumers but currently have a lower than median satisfaction score</p>	<ul style="list-style-type: none"> • Consistent with 2019, ‘access to information and online services’ continues to be a primary opportunity area • Designing processes that are ‘easy’ to understand and seamless to navigate is identified as a new primary opportunity area in 2020 • ‘Efficiency and effectiveness’ has been a priority area from 2015-2019. In 2020, it has been identified as a strength to build on along with the ‘honesty and integrity’, ‘communication’ and ‘fairness and empathy’ of employees
<p>Consumers rate the Customer Commitment of ‘Act with Empathy’ the highest</p>	<ul style="list-style-type: none"> • Attributes related to the Customer Commitment of <i>Act with empathy</i>, ‘I was treated fairly’ (8.0/10) and ‘I was treated with respect’ (8.1/10) are two of the top three rated attributes along with ‘I reached an outcome, positive or negative’ (8.1/10), an attribute related to the Customer Commitment of <i>Resolve the situation</i>



Summary of Key Findings

CSI and Outcome Measures

Key Findings

Businesses' overall satisfaction with NSW Government services has improved significantly for the first time since 2016

Evidence

- Business satisfaction with NSW Government services has improved significantly from 7.4/10 in 2019 to 7.7/10 in 2020
- Business expectations have remained stable at 7.8/10 against increasing satisfaction leading to a narrowing of the expectation gap from 0.4 points in 2019 to 0.1 points in 2020
- Comparison to ideal services score for business has also seen a significant improvement from 7.1/10 in 2019 to 7.4/10 in 2020
- This has resulted in a significant increase in the CSI from 77.6 in 2019 to 80.7 in 2020
- NSW leads other jurisdictions (VIC, QLD and SA) on expectation and satisfaction with scores of 7.8/10 and 7.7/10 respectively
- Customer effort score for businesses has remained relatively stable at 6.3/10. There has been no significant shift in the ease of doing business score which stands at 4.8/10
- Overall trust in NSW Government services has increased significantly from 7.4/10 in 2019 to 7.7/10 in 2020 and NSW leads other jurisdictions in having the highest trust score

Summary of Key Findings

Drivers of Satisfaction and Service Attributes

Key Findings	Evidence
<p>Businesses' perceptions of NSW Government services in relation to processes, goals, values and employees have improved significantly compared to 2019</p>	<ul style="list-style-type: none"> • The average score for employee related attributes has increased from 7.2/10 in 2019 to 7.5/10 in 2020 • The employee attributes of 'deliver high safety standards' and 'are honest' have the highest score of 7.9/10 • Average scores of process related attributes improved from 6.5/10 in 2019 to 7.0/10 in 2020, but they continue to be the lowest scoring attributes • Consistent with 2019, 'Encourage public participation in decision making' (6.6/10) continues to remain the lowest rated attribute despite a significant increase in the average score
<p>'Speed of service' from employees is identified as a primary opportunity area in 2020 to drive an increase in business satisfaction with NSW Government services, as it is of high relative importance to businesses but currently has a lower than median satisfaction score. 'Speed of processes' has been identified as a secondary opportunity area</p>	<ul style="list-style-type: none"> • 'Speed of service' from NSW Government services employees is identified as a primary opportunity area in 2020 • 'Speed of processes' is identified as a secondary opportunity due to its moderate importance but lower than median attribute score • Rising importance of speed may be related to the impacts of COVID-19: 40% of business respondents report facing financial hardship due to the COVID-19 pandemic, 37% report having to work reduced hours and 30% report having to work from home more often • 'Fairness and empathy', 'communication and consistency', 'accountability', and 'honesty and integrity' are areas of strength to build on
<p>Businesses rate the Customer Commitment of 'Act with empathy' the highest</p>	<ul style="list-style-type: none"> • The <i>Act with Empathy</i> attributes of 'I was treated fairly' (7.8/10) and 'I was treated with respect' (7.9/10) are two of the top three rated attributes along with 'I reached an outcome, positive or negative' (7.9/10), an attribute related to the Customer Commitment of <i>Resolve the situation</i>



Summary of Key Findings

Contact Method	
Key Findings	Evidence
<p>'In person' and online are the two most used contact methods by consumers and businesses. Customers who use these channels experience relatively higher overall satisfaction and lower effort when interacting with NSW Government services</p> <p>Online is gaining traction as the most preferred contact method among both consumers and businesses, a trend that may have been amplified by the COVID-19 pandemic</p> <p>NSW leads other jurisdictions in having the highest adoption of online channels for both consumers and business</p>	<ul style="list-style-type: none"> • 'In person' continues to be the most used channel by consumers (52%) and businesses (43%) • Use of online as a contact method increased significantly from 31% in 2019 to 37% in 2020 for consumers and increased significantly from 31% in 2019 to 39% in 2020 for businesses • A higher proportion of interactions with NSW Government services during COVID-19 restrictions* happened online (43% for consumer and 41% for businesses) compared to before COVID-19 restrictions (33% for both consumers and businesses) • Selection of online as the most preferred contact method has increased significantly for both consumers (from 24% in 2019 to 30% in 2020) and businesses (from 18% in 2019 to 25% in 2020) • Consumers who used online or 'in person' contact methods have the highest overall satisfaction of 8.0/10 • Consumers who used online channels have the lowest overall effort score of 5.6/10 followed by 5.7/10 for consumers who have 'in person' interactions • Businesses who used online or 'in person' have the same overall satisfaction score of 7.8/10 and the same lowest overall effort score of 6.3/10 • Current and accurate content, accessible format and secure information handling are top rated attributes of online channel usage for both consumers and businesses • The main reasons for not using online channels for both consumers and businesses is the service not being available or possible to be undertaken online • NSW has the highest proportion of both consumers (37%) and businesses (39%) using online contact methods in comparison to other jurisdictions



*The survey was fielded in July 2020 so interactions that happened within 3 months of July 2020 have been considered to have happened under COVID-19 restrictions. 67% of all dealings happened within this period (n=4,552)



Summary of Key Findings

Brand Perceptions	
Key Findings	Evidence
<p>Brand perceptions of both state and Federal government have improved significantly with NSW Public Service overall having the highest brand perception score for both consumers and businesses</p>	<ul style="list-style-type: none"> NSW Public Service overall has the highest average satisfaction score of 7.3/10 for both consumers and businesses, compared to other industries. This is a significant increase of 0.2 points for consumers and 0.4 points for businesses compared to 2019 Perceptions of the Federal government have also increased significantly to 6.6/10 in 2020 (compared to 5.7/10 in 2019) for consumers and 6.7/10 in 2020 (compared to 6.0/10 in 2019) for businesses Compared to other jurisdictions, NSW consumers and businesses have the most positive perception of the NSW Public Service overall <ul style="list-style-type: none"> Consumer average satisfaction scores for the 'Public Service' brand in each jurisdiction: NSW (7.3/10), QLD (7.2/10), VIC (7.0/10), SA (7.0/10) Business average satisfaction scores for the 'Public Service' brand in each jurisdiction: NSW (7.3/10), QLD (6.9/10), VIC (7.0/10), SA (6.9/10) 'Helpful', 'friendly' and 'knowledgeable' are the top three words used by consumers to describe the NSW Public Service overall. The top three words used by businesses are 'helpful', 'friendly' and 'respectful'





Summary of Key Findings

Feedback	
Key Findings	Evidence
<p>The volume of feedback is consistent, however the nature of feedback has changed with a shift from complaints to suggestions for change</p> <p>Consumers and businesses who have made a complaint in 2020 have had a better complaint making and complaint handling experience compared to 2019</p>	<ul style="list-style-type: none"> • The proportion of customers giving feedback has remained consistent at 33% for consumers (vs. 34% in 2019) and 42% for businesses (vs. 42% in 2019) • 22% of all consumer feedback received in 2020 were complaints compared to 28% in 2019 and 38% of all feedback received were suggestions for change compared to 29% in 2019 • 17% of all business feedback received in 2020 were complaints compared to 37% in 2019 and 49% of all feedback received were suggestions for change compared to 41% in 2019 • 36% of all consumers suggestions and 41% of all business suggestions pertain to processes • The ‘ease of making complaints’ score improved significantly for consumers from 5.8/10 in 2019 to 6.5/10 in 2020. Businesses have also seen an improvement in the ease of making complaints with the score increasing from 5.8/10 in 2019 to 6.7/10 in 2020 • There has been a significant decline in the proportion of consumer complaints being handled poorly from 55% in 2019 to 41% in 2020 • The proportion of business complaints being handled poorly has also declined from 50% in 2019 to 39% in 2020 but this shift is not significant



III. Detailed Key Findings



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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
- 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)

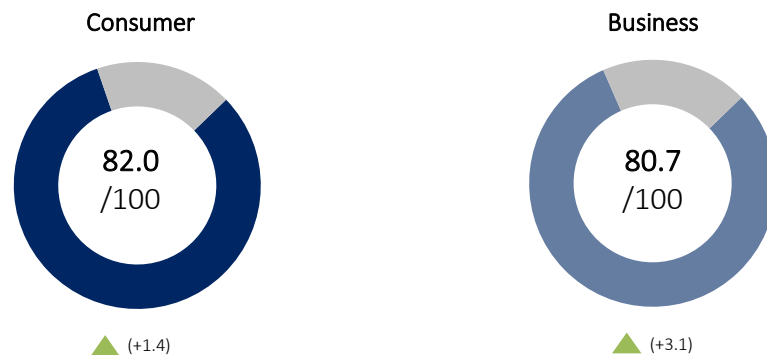
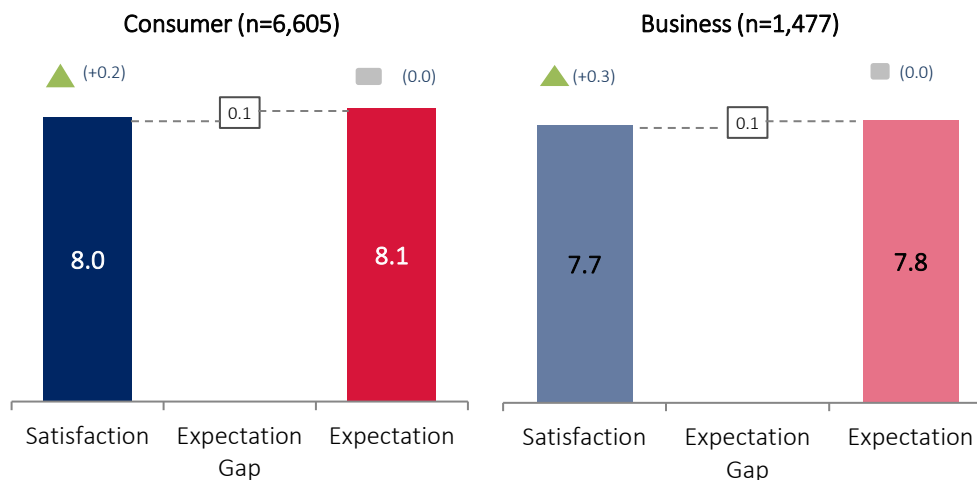


Figure 1.2: Satisfaction, Expectation and Expectation gap (out of 10)



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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



Consumer CSI has increased significantly, driven by a significant improvement in consumer satisfaction

Key Points:

- Consumer CSI has increased significantly to 82.0/100 in 2020 compared to 80.6/100 in 2019
- While consumer expectations have remained stable, their satisfaction with NSW Government services has increased significantly, contributing to a narrowing of the expectation gap and a significantly higher CSI in 2020

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

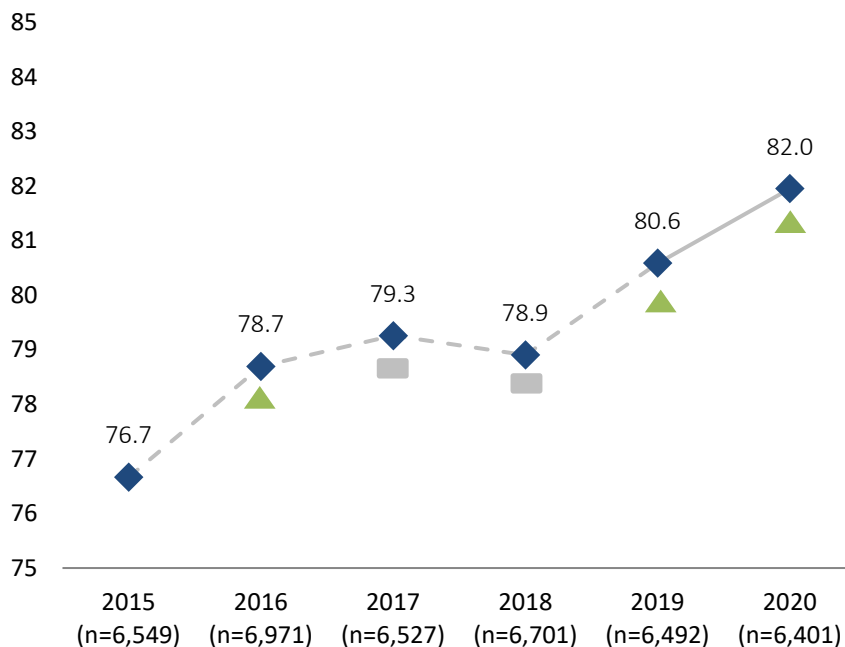
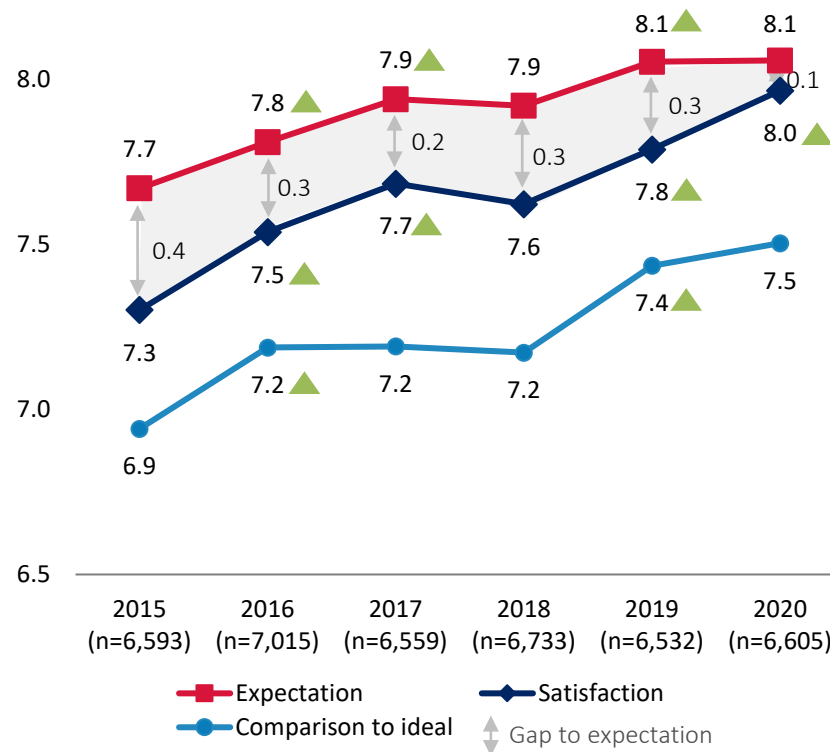


Figure 1.4: Top line performance – Consumer (out of 10)



Consumer

Observed over 5 years, all key outcome metrics have been trending upwards indicating an improvement in overall consumer experience with NSW Government services

Key Points

- A combination of increasing consumer expectations, satisfaction and increasing comparison to ideal scores has contributed to an overall increase in CSI over 5 years

Figure 1.5: Customer Satisfaction Index trend – Consumer (out of 100)

Period	Sample Size (n)	CSI Score	Change
CSMS 2015	6,549	76.7	-
CSMS 2016	6,971	78.7	↑
Q4 2016	1,612	77.8	-
Q1 2017	1,540	79.5	↑
Q2 2017	1,594	78.6	-
CSMS 2017	6,527	79.3	-
Q4 2017	1,508	80.2	↑
Q1 2018	1,610	79.9	-
Q2 2018	1,603	79.6	-
CSMS 2018	6,701	78.9	-
Q4 2018	1,535	79.9	↑
Q1 2019	1,575	79.4	-
Q2 2019	1,555	80.9	-
CSMS 2019	6,492	80.6	-
Q4 2019	1,517	80.6	-
CSMS 2020	6,401	82.0	↑

Figure 1.6: Top line performance trend – Consumer (out of 10)

Period	Sample Size (n)	Satisfaction	Expectation	Comparison to ideal service	Change
CSMS 2015	6,593	7.3	7.7	6.9	-
CSMS 2016	7,015	7.5	7.8	7.2	↑
Q4 2016	1,621	7.4	7.8	7.2	-
Q1 2017	1,548	7.6	7.9	7.3	↑
Q2 2017	1,605	7.6	7.8	7.2	-
CSMS 2017	6,559	7.7	7.9	7.2	↑
Q4 2017	1,518	7.7	7.8	7.3	↑
Q1 2018	1,628	7.7	7.9	7.2	-
Q2 2018	1,618	7.7	7.9	7.3	-
CSMS 2018	6,733	7.6	7.9	7.2	-
Q4 2018	1,545	7.8	8.0	7.3	↑
Q1 2019	1,590	7.7	7.8	7.2	-
Q2 2019	1,564	7.8	8.0	7.4	↑
CSMS 2019	6,532	7.8	8.1	7.4	↑
Q4 2019	1,517	7.8	8.0	7.4	-
CSMS 2020	6,605	8.0	8.1	7.5	↑

Note : No data available for Q1 2020 and Q2 2020 as the QPCS was not undertaken

- 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

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

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Regional consumers continue to be the most satisfied and also have the highest expectations of NSW Government services

Key Points

- **Age:** Consumers aged 65+ have the highest satisfaction (8.5/10) and consumers aged 25-34 years old have the lowest satisfaction (7.6/10) with NSW Government services
- **Region:** Regional (8.3/10) and rural (8.1/10) consumers are more satisfied with NSW Government services compared to metropolitan consumers (7.9/10)
- **Employment status:** Students have the lowest satisfaction with NSW Government services (7.6/10)
- **Gender:** Male and female consumers are on par in their satisfaction with NSW Government services (8.0/10 for both) and both have experienced a significant increase in satisfaction compared to 2019
- **Income:** Consumers earning up to \$30,000 per year have experienced a significant increase in satisfaction compared to 2019

Figure 1.7: Consumer satisfaction by demographic cohorts (n=6,605)

	Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)
Age	65+ years (8.5/10)	25-34 years (7.6/10)	35-44 years (-0.2)
Region	Regional (8.3/10) ▲	Metropolitan (7.9/10) ▲	Rural (-0.2)
Employment status	Retired (8.5/10)	Student (7.6/10)	Self-employed /business owner (-0.1)
Gender	Male and Female (8.0/10) ▲	-	Male and Female (-0.1)
Income	Up to \$30,000 (8.2/10) ▲	\$100,001 to \$150,000 (7.8/10)	\$50,001 to \$100,000 (-0.1)

Figure 1.8: Consumer satisfaction and expectation by region



Note: Base sizes vary for each 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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



Satisfaction continues to be lower among those with mental health conditions, Aboriginal and/or Torres Strait Islander backgrounds and non-English speakers

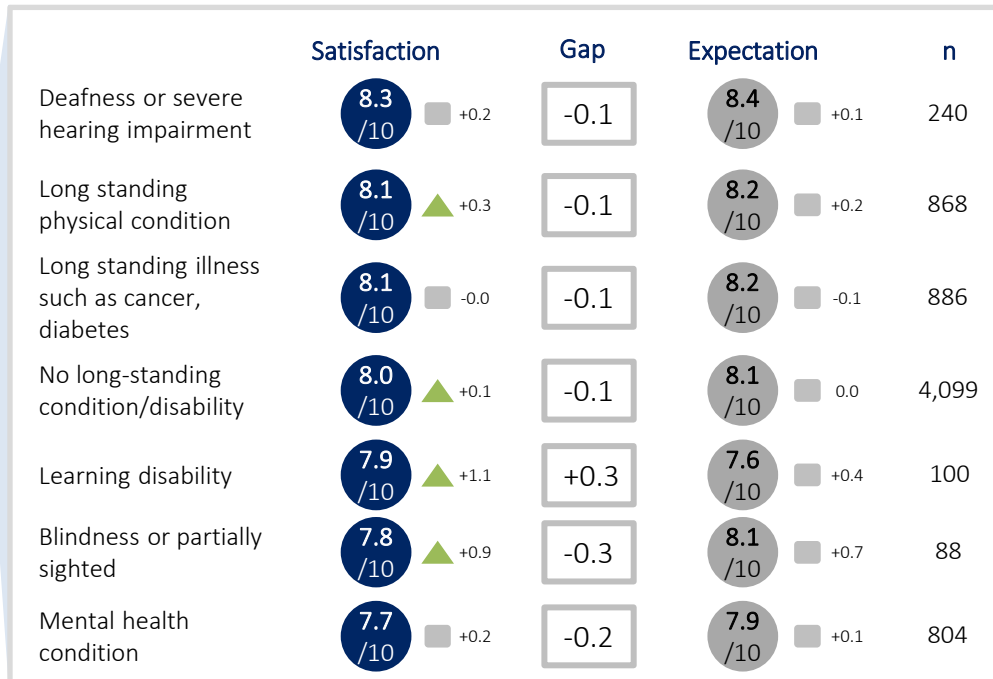
Key Points

- **Disability:** Overall, there is an improvement in the experiences of consumers with disabilities, but the average remains lower than the overall satisfaction score of 8.0/10
- **Aboriginal and/or Torres Strait Islander origin:** Aboriginal and Torres Strait Islander consumers continue to experience lower satisfaction compared to non-Aboriginal and Torres Strait Islander consumers who have seen a significant increase in satisfaction from 2019 to 2020
- **Language spoken at home:** Consumers who speak only English have seen a significant increase in satisfaction and continue to experience higher satisfaction compared to those who speak other languages

Figure 1.9: Consumer satisfaction by disability, ethnicity and language (n=6,605)

	Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)
Disability	Deafness or severe hearing impairment (8.3/10)	Mental health condition (7.7/10)	Blindness or partially sighted (-0.3)
Aboriginal and Torres Strait Islander*	Not of Aboriginal or Torres Strait Islander Origin (8.0/10) ▲	Aboriginal and/or Torres Strait Islander (7.7/10)	Aboriginal and/or Torres Strait Islander (-0.2)
Language	English only (8.0/10) ▲	Language other than English (7.7/10)	English only (-0.1)

Figure 1.10: Consumer satisfaction and expectation by disability



Note: Base sizes vary for each demographic group

*Aboriginal and Torres Strait Islander populations have been grouped due to sample size

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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

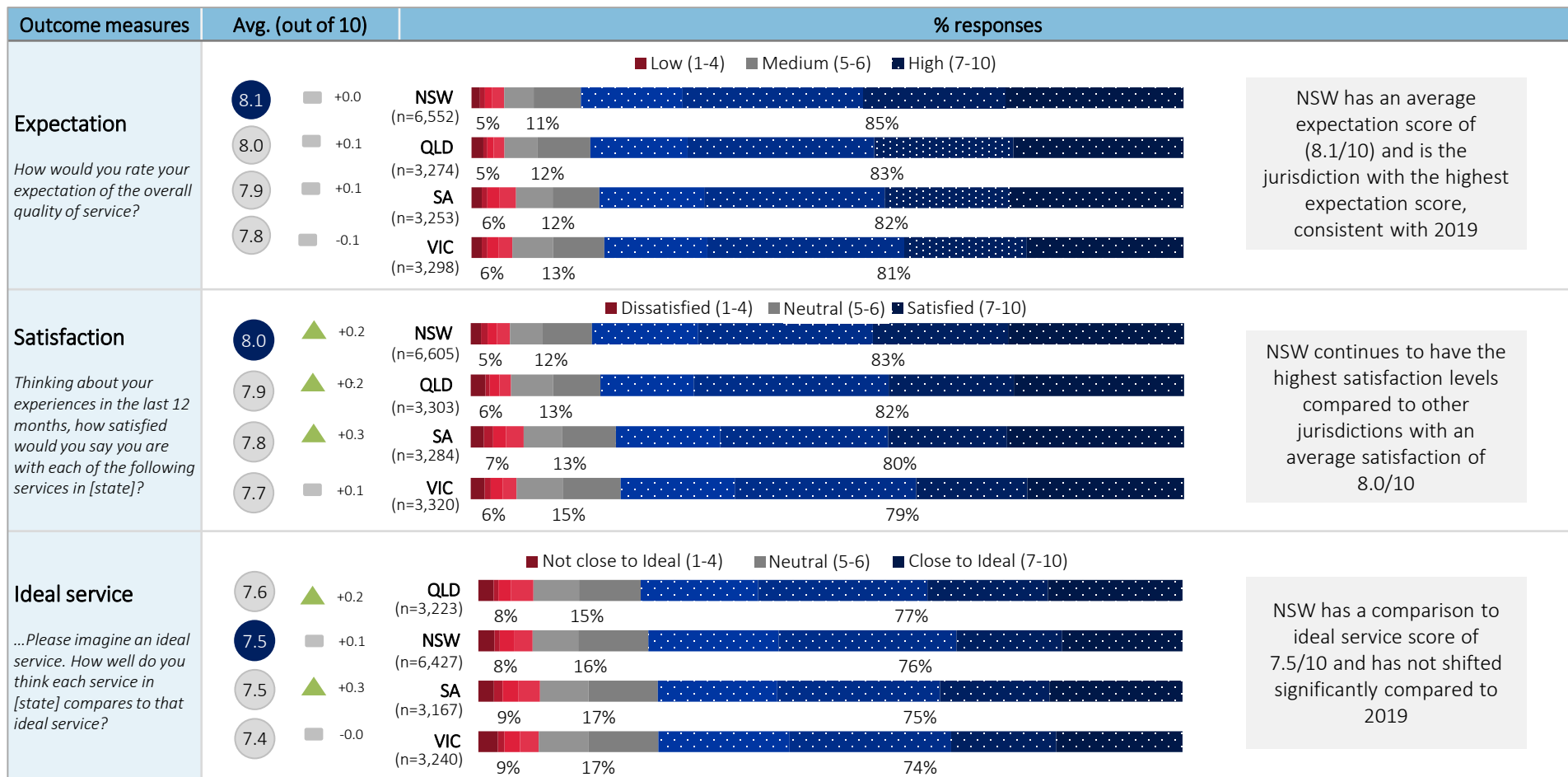




Across jurisdictions, NSW ranks first in consumer satisfaction and expectation in 2020

Key Points

- Consumer expectations have remained stable across jurisdictions (NSW, QLD, VIC and SA) in 2020
- Consumer satisfaction has seen a significant improvement in all jurisdictions except VIC from 2019 to 2020
- NSW leads other jurisdictions in consumer expectations and satisfaction and is second after QLD in comparison to ideal service



NSW has an average expectation score of (8.1/10) and is the jurisdiction with the highest expectation score, consistent with 2019

NSW continues to have the highest satisfaction levels compared to other jurisdictions with an average satisfaction of 8.0/10

NSW has a comparison to ideal service score of 7.5/10 and has not shifted significantly compared to 2019



Consumer effort when interacting with NSW Government services has decreased significantly in 2020

Key Points

- Proportion of consumers experiencing low effort (1-4 out of 10) has increased significantly by 4% points from 31% in 2019 to 35% in 2020; correspondingly consumers experiencing high effort (7-10 out of 10) decreased significantly by 3% points (from 47% in 2019 to 44% in 2020)
- Overall, consumers who experience lower effort have higher satisfaction, expectation and trust in NSW Government services compared to those who experience higher effort
- A significant drop in effort corresponds to a significant increase in overall consumer satisfaction

Figure 1.11: Breakdown of effort – Consumer

Average Customer Effort Score (CES)

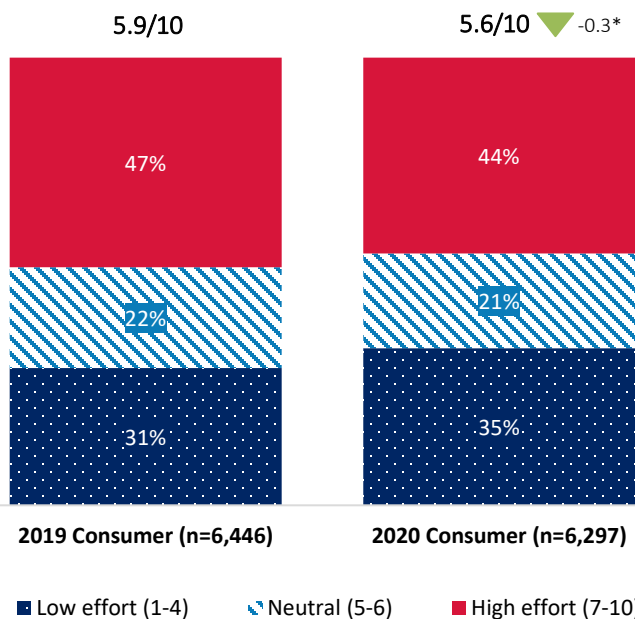
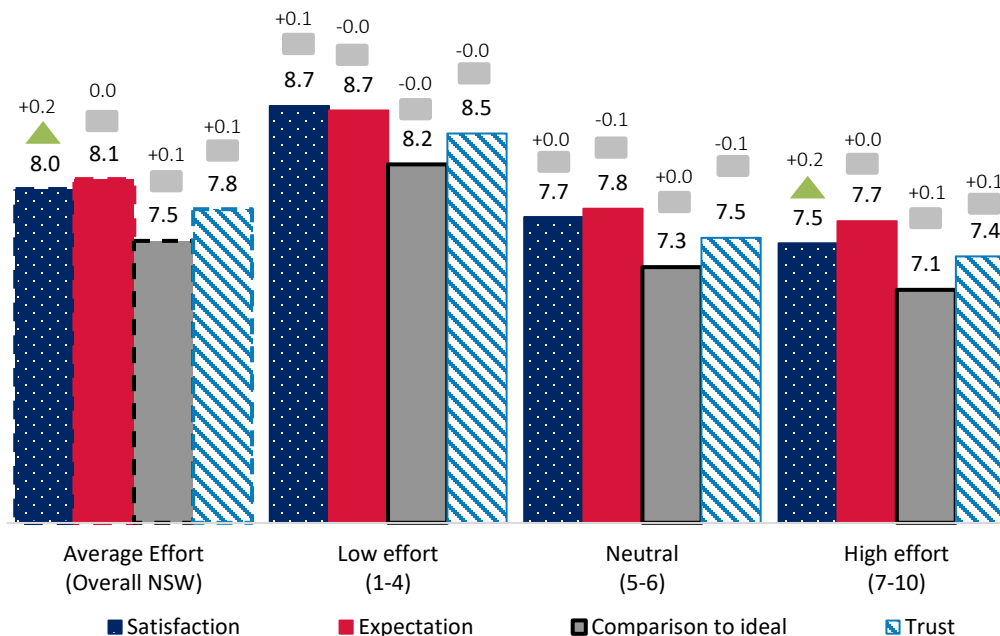


Figure 1.12: Comparison of effort to outcome measures (out of 10) – Consumer (n=6,297)



*Statistically significant decrease in avg. CES from previous year is denoted in green as a lower CES denotes a positive shift in customer experience

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)

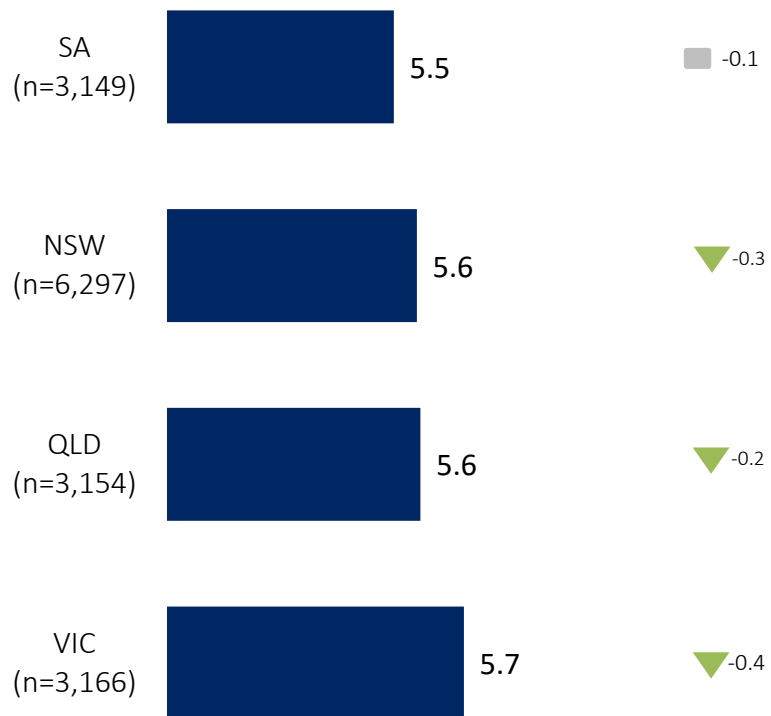


NSW has seen a significant decline in Customer Effort Score from 2019 to 2020 and has the second lowest score after SA

Key Points:

- NSW has seen a significant improvement in its Customer Effort Score (CES) from 5.9/10 in 2019 to 5.6/10 in 2020
- NSW ranks on par with QLD and behind SA which has the lowest CES in 2020
- Despite a significant decrease over 2019, VIC ranks last on CES compared to other jurisdictions

Figure 1.13: Consumer CES by jurisdiction (out of 10)





Consumers on maternity/paternity leave experienced a significant increase in effort compared to 2019

Key Points:

- **Age:** Consumers aged 18-24 experienced the highest effort in dealing with NSW Government services
- **Region:** Consumers in metropolitan regions experienced the highest effort and also have the lowest satisfaction with NSW Government services
- **Employment Status:** Consumers on maternity/paternity leave have seen a significant increase in effort and have the highest effort score of 6.9/10 across demographic cohorts
- **Gender:** Female consumers experienced higher effort than male consumers
- **Income:** Consumers earning up to \$30,000 per year experienced the most improvement in effort score in 2020 compared to 2019. They also experienced the highest satisfaction across income groups in 2020

Figure 1.14: Consumer CES by demographic cohort (n=6,297)

	Highest effort (within demographic category)	Lowest effort (within demographic category)	Highest increase in effort since 2019	Highest decrease in effort since 2019
Age	18-24 years (6.3/10)	65 years + (4.7/10) ▼	Nil	55-64 years (5.0/10) ▼
Region	Metropolitan (5.7/10) ▼	Regional (5.2/10) ▼	Nil	Rural (5.3/10)
Employment status	On maternity/ paternity leave (6.9/10) ▲	Retired (4.7/10) ▼	On maternity/ paternity leave (6.9/10) ▲	Student (6.2/10)
Gender	Female (5.7/10)	Male (5.5/10) ▼	Nil	Male (5.5/10) ▼
Income	\$100,001 to \$150,000 (5.7/10)	Over \$180,000 (5.4/10)	Nil	Up to \$30,000 (5.6/10) ▼

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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



Consumer trust has remained stable in 2020 and consumers with high trust continue to have positive perceptions of NSW Government services

Key Points

- The proportion of consumers placing high trust in NSW Government services (7-10 out of 10) has increased by 2% points (from 78% in 2019 to 80% in 2020)

Figure 1.15: Breakdown of overall trust – Consumer

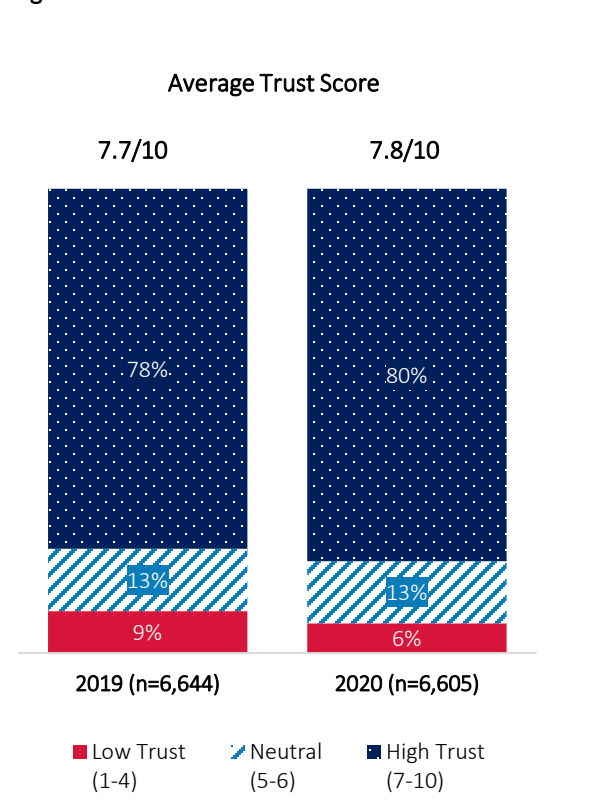
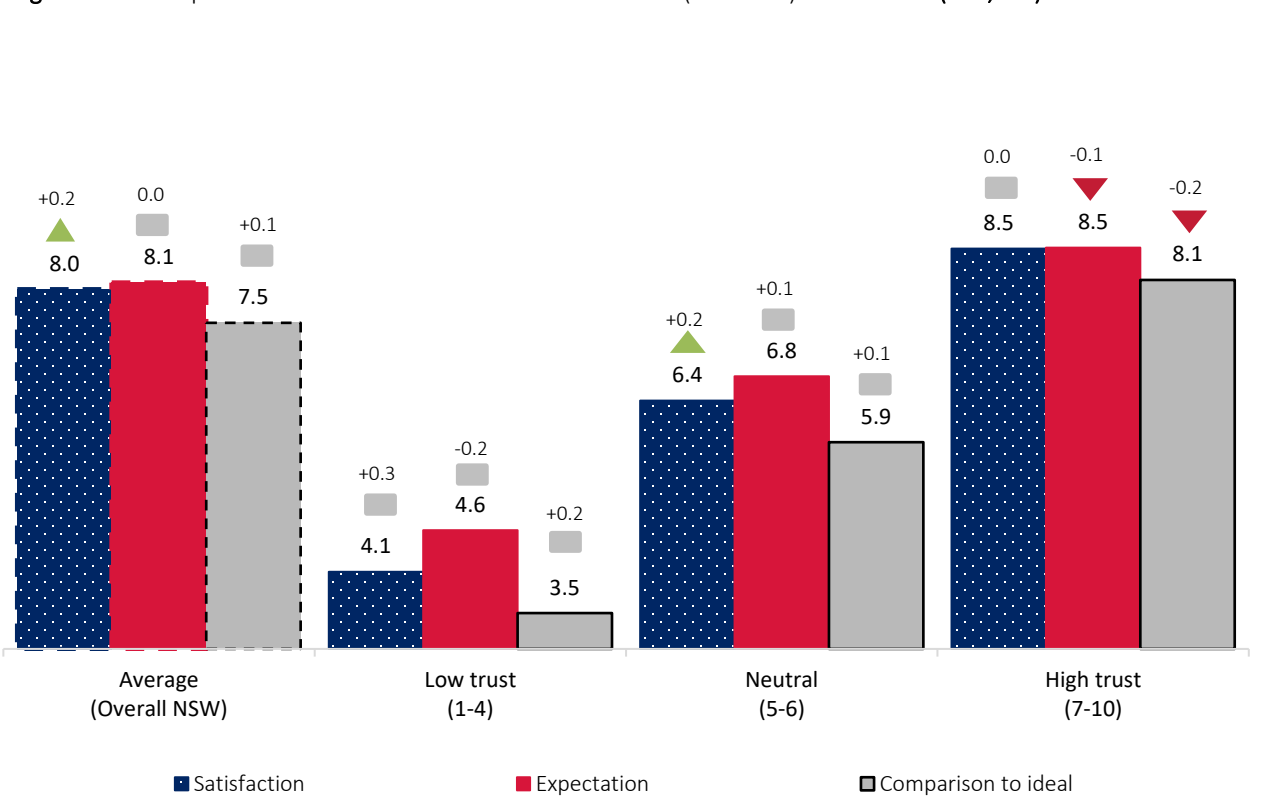


Figure 1.16: Comparison of overall trust to outcome measures (out of 10) – Consumer (n=6,605)

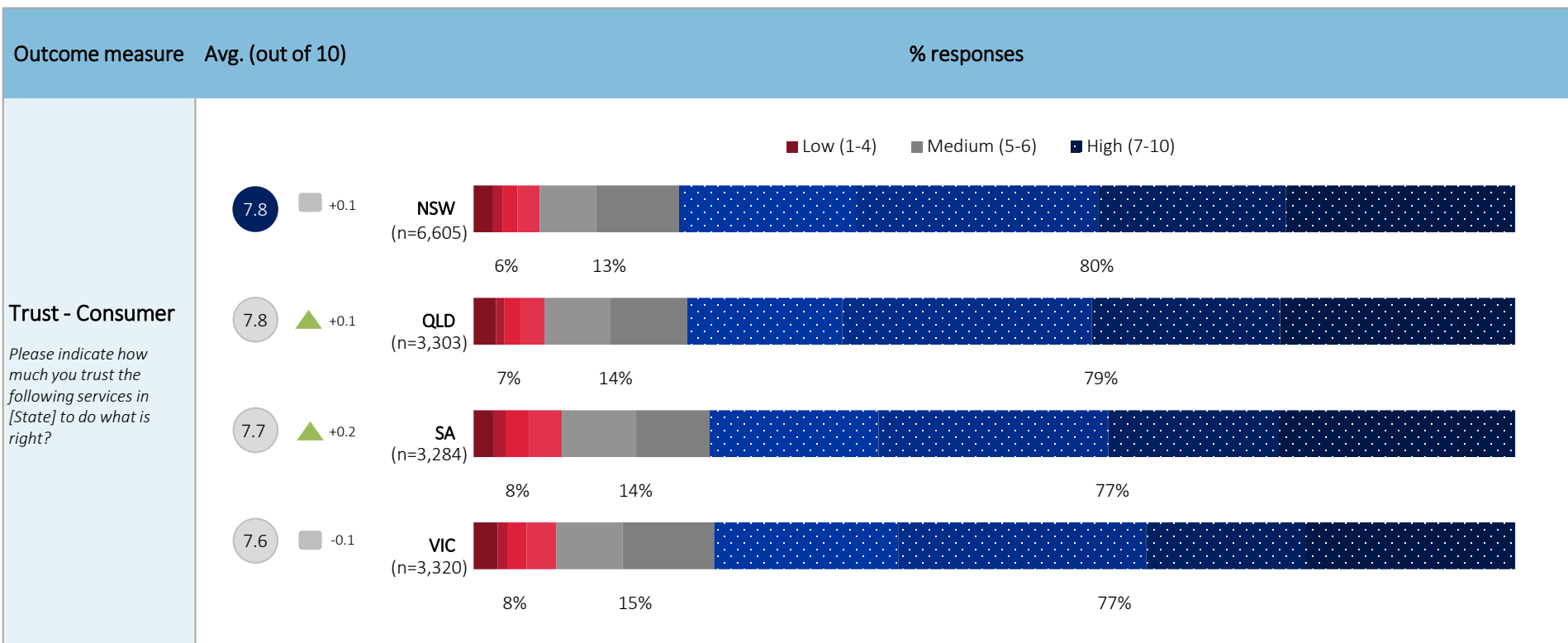




Across jurisdictions, NSW consumers have the highest trust in their Government services

Key Points

- Consumer trust has stayed relatively stable at 7.8/10 in 2020
- Across other jurisdictions:
 - Trust in Government services in VIC has stayed relatively stable in 2020 compared to 2019
 - Trust in Government services in SA and QLD has significantly increased from 2019 to 2020



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)

1. CSI & Outcome Measures

Business



Business CSI has increased significantly for the first time in 4 years driven by a significant jump in business satisfaction

Key Points

- Business CSI has increased significantly to 80.7/100 in 2020 from 77.6/100 in 2019
- Stable business expectations coupled with a significant increase in satisfaction have lowered the expectation gap in 2020
- There has also been a significant increase in the average scores for comparison to ideal service leading to an overall significant increase in Business CSI

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

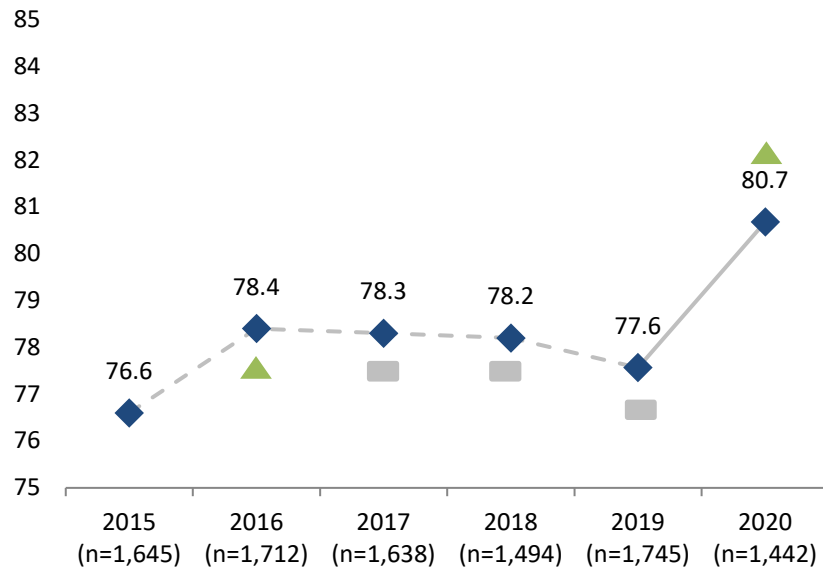
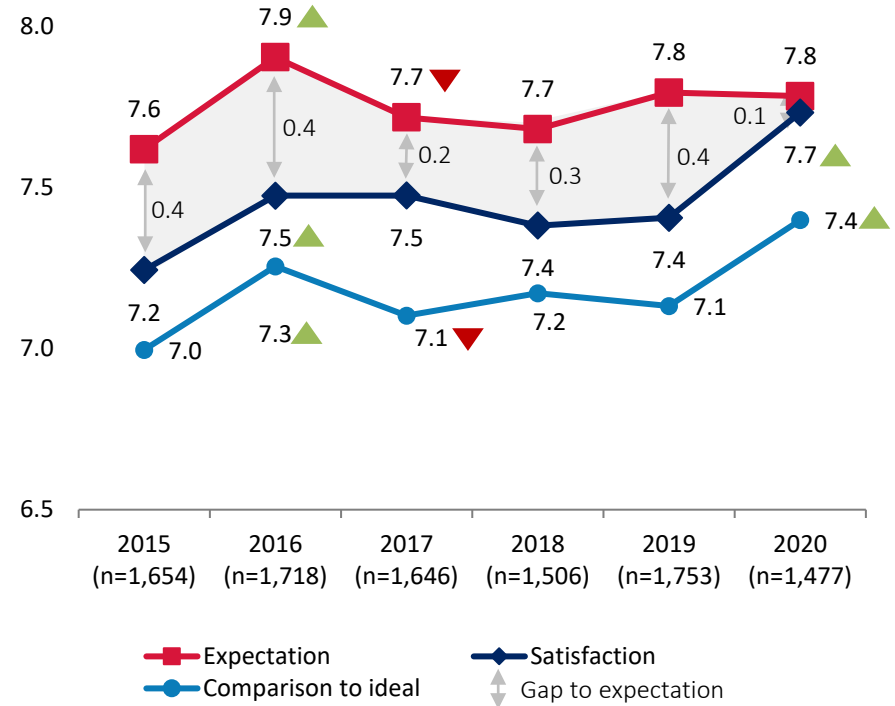


Figure 1.18: Top line performance – Business (out of 10)



Business CSI has increased significantly in 2020 compared to 2019

Key Points

- Expectation scores have remained stable since 2018
- Satisfaction and comparison to ideal scores have improved significantly in 2020 compared to the same period in 2019 leading to an overall improvement in CSI

Figure 1.19: Customer Satisfaction Index trend – Business (out of 100)

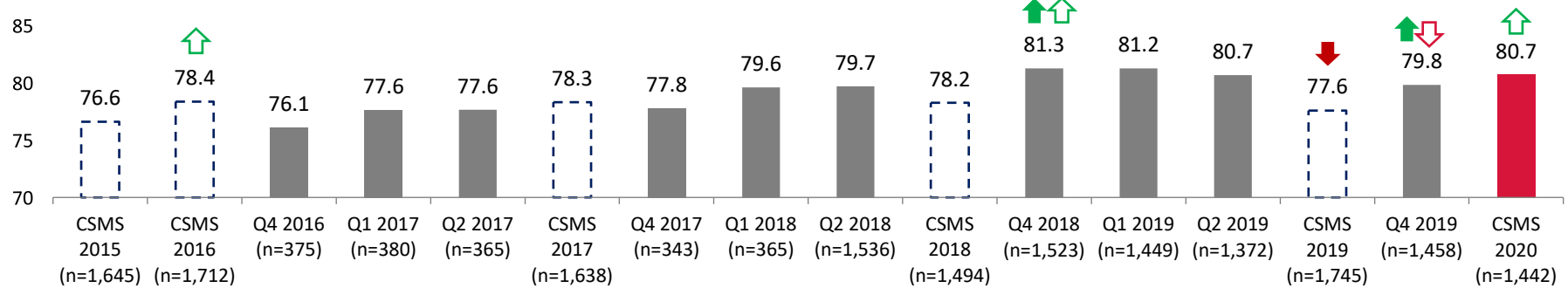
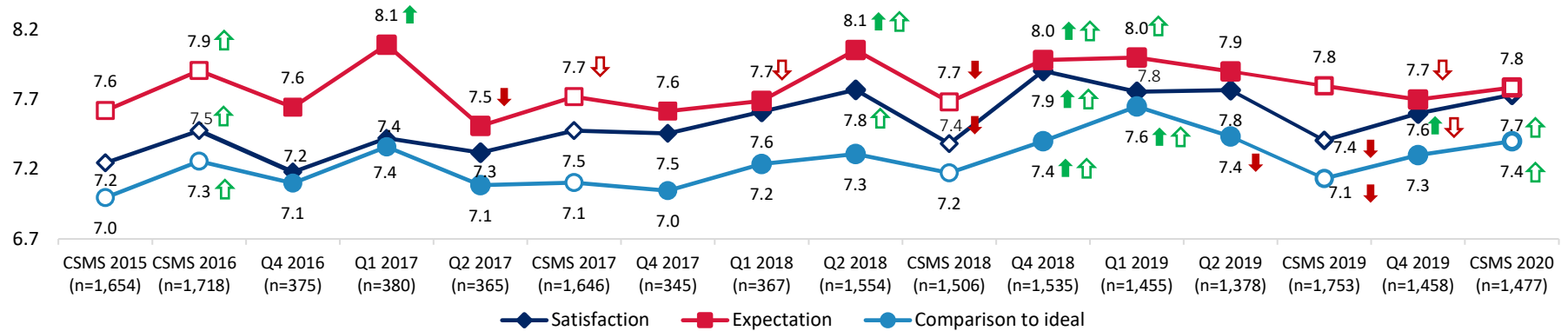


Figure 1.20: Top line performance – Business (out of 10)



The Roy Morgan Index* indicates a drop in business confidence. However, business satisfaction with NSW Government services has improved significantly

Key Points

- There is a drop in business confidence as per the Roy Morgan Business Index likely due to the COVID-19 pandemic. This corresponds to 40% of businesses reporting that they have experienced financial hardship due to the COVID-19 pandemic in the CSMS 2020 survey
- However, this has not negatively impacted perceptions of NSW Government services, with businesses showing significantly higher satisfaction in 2020 compared to 2019

Figure 1.21: Customer Satisfaction Index trend with Roy Morgan Index – Business

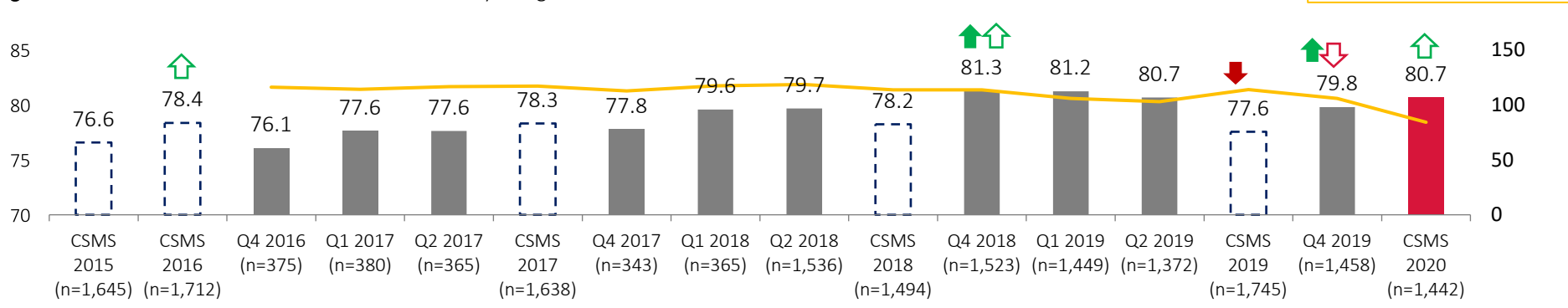
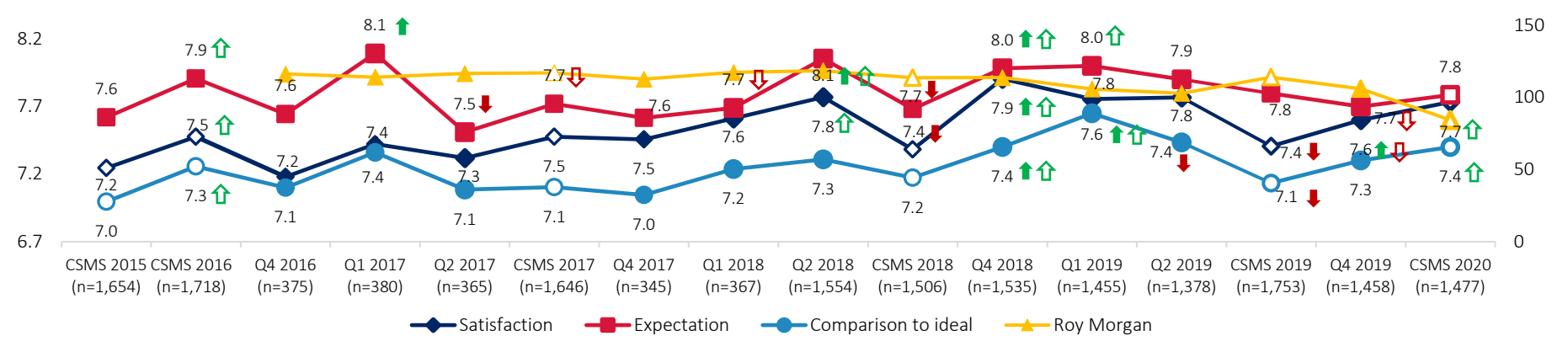


Figure 1.22: Top line performance trend with Roy Morgan Index – Business



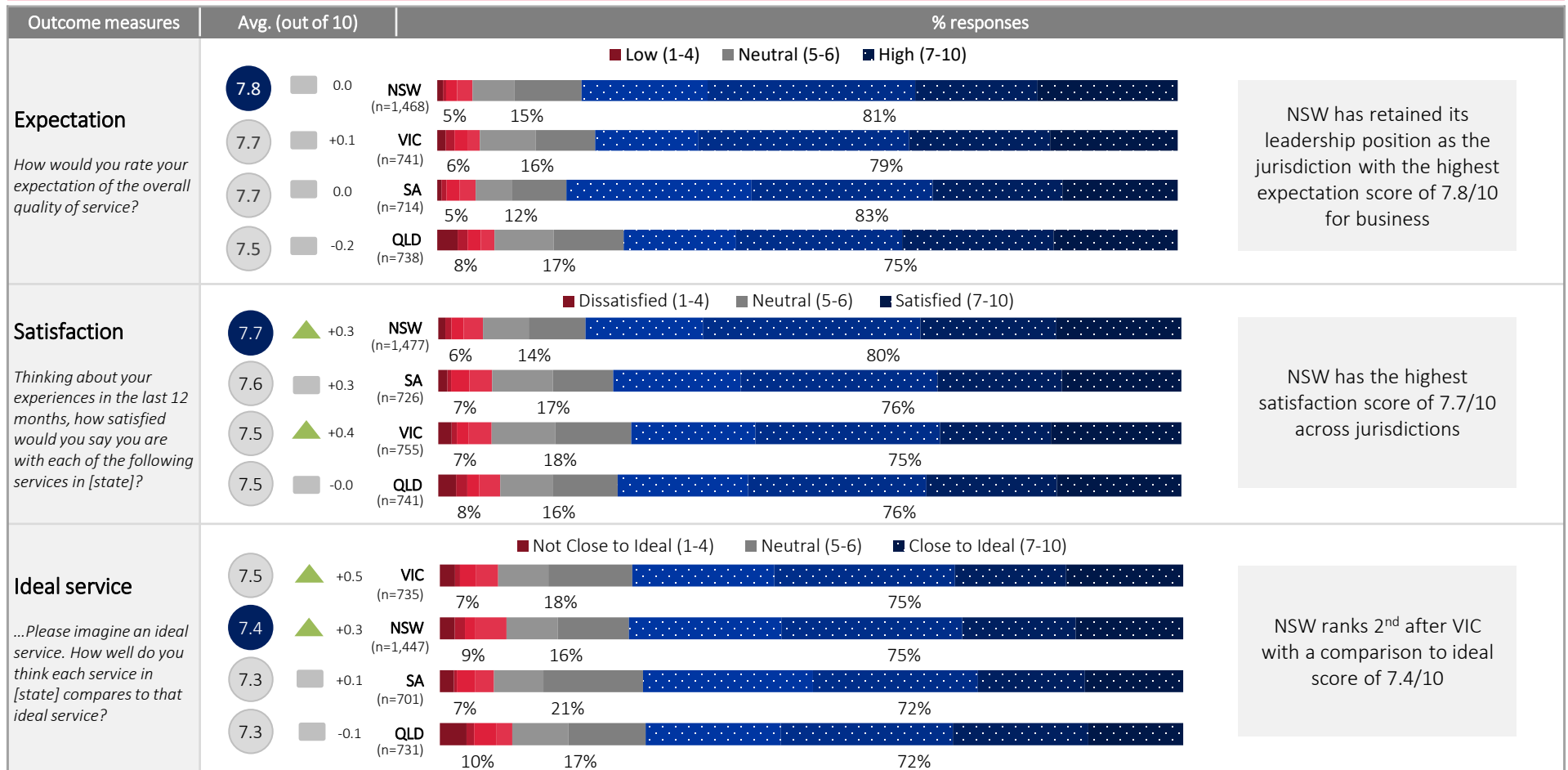
*The Roy Morgan Business Confidence Rating is 100.0 plus the simple unweighted average of the difference between the percentage of respondents who give a favourable and those who give unfavourable answers to five key questions: current and expected business financial situation N12M, economic outlook N12M, overall outlook N12M, Investment outlook N12M

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

NSW Businesses continue to have the highest expectations of NSW Government services compared to other jurisdictions. They also experience the highest satisfaction

Key Points

- 80% of businesses were satisfied (7-10 out of 10) with NSW Government services this year (vs. 72% in 2019) leading to a significantly higher overall satisfaction score of 7.7/10
- NSW ranks 2nd in comparison to ideal service with VIC having the highest ideal service score



Satisfaction has remained stable across most business demographic cohorts and increased significantly for businesses in metropolitan regions

- Key Points**
- **Business size:** Businesses with 6-9 employees have the highest satisfaction score of 8.1/10 (an increase of 0.9 points compared to 2019)
 - **Region:** Businesses in metropolitan regions have higher satisfaction compared to rural and regional businesses
 - **Industry:** The education and training sector has the lowest satisfaction with NSW Government services (7.3/10)
 - **Revenue:** Businesses with a revenue of \$500,000 to \$2 million have the biggest expectation gap

Figure 1.25: Business satisfaction by demographic cohorts (n=1,477)

	Highest satisfaction (within demographic category)	Lowest satisfaction (within demographic category)	Biggest gap to expectation (within demographic category)
Business Size	6 – 9 employees (8.1/10) ▲	2 – 5 employees (7.6/10)	200+ employees (-0.2)
Region	Metro (7.8/10) ▲	Regional (7.6/10)	Regional (-0.2)
Industry*	Administrative and support services (8.2/10)	Education and training (7.3/10)	Construction (-0.2)
Revenue	\$200,001 - \$500,00 (7.9/10)	\$500,001 - \$2,000,000 (7.6/10)	\$500,001 to \$2,000,000 (-0.3)

Figure 1.26: Business satisfaction and expectation by region and business size

	n	Satisfaction	Gap	Expectation
6 – 9 employees	144	8.1 /10 ▲ +0.9	0.1	8.0 /10 ■ +0.4
20 – 199 employees	345	7.8 /10 ▲ +0.5	-0.2	8.0 /10 ■ +0.3
200+ employees	299	7.8 /10 ▲ +0.5	-0.2	7.9 /10 ▲ +0.4
10 – 19 employees	243	7.7 /10 ■ +0.3	-0.1	7.8 /10 ■ 0.0
Sole proprietor	203	7.6 /10 ■ 0.0	-0.1	7.7 /10 ■ -0.3
2 – 5 employees	243	7.6 /10 ■ +0.2	-0.1	7.7 /10 ■ -0.1
		Satisfaction	Gap	Expectation
Located in Metropolitan NSW	1193	7.8 /10 ▲ +0.4	0.0	7.8 /10 ■ 0.0
Located in Rural NSW	74	7.7 /10 ■ +0.2	0.3	7.6 /10 ■ -0.6
Located in Regional NSW	210	7.6 /10 ■ +0.2	-0.2	7.8 /10 ■ 0.0

Effort when interacting with NSW Government services has remained stable for businesses in 2020 compared to 2019

Key Points

- 55% of businesses reported experiencing high effort when interacting with NSW Government services, down 2% points from 57% in 2019
- Businesses experiencing low effort continue to have higher satisfaction, expectation and trust in NSW Government services

Figure 1.27: Breakdown of effort - Business

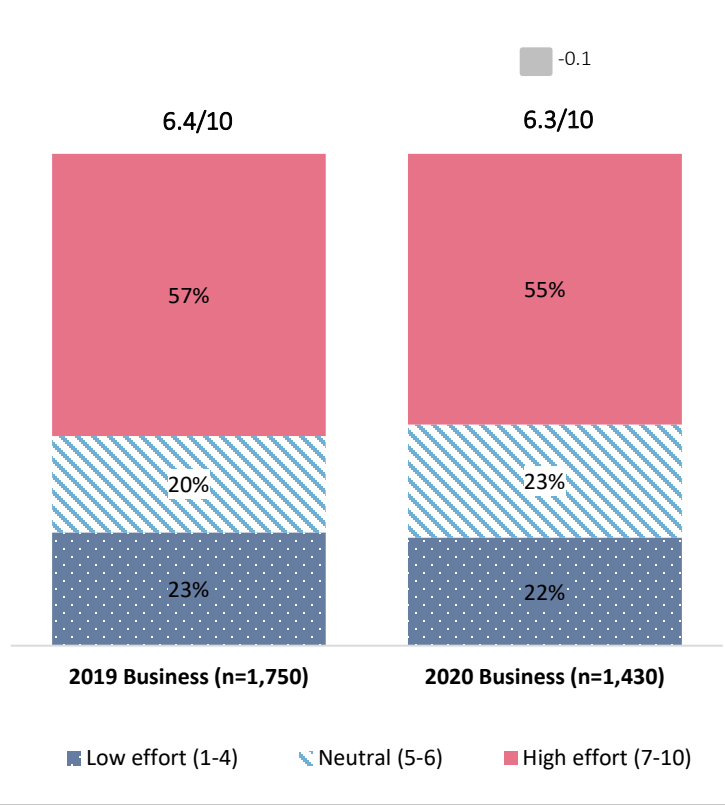
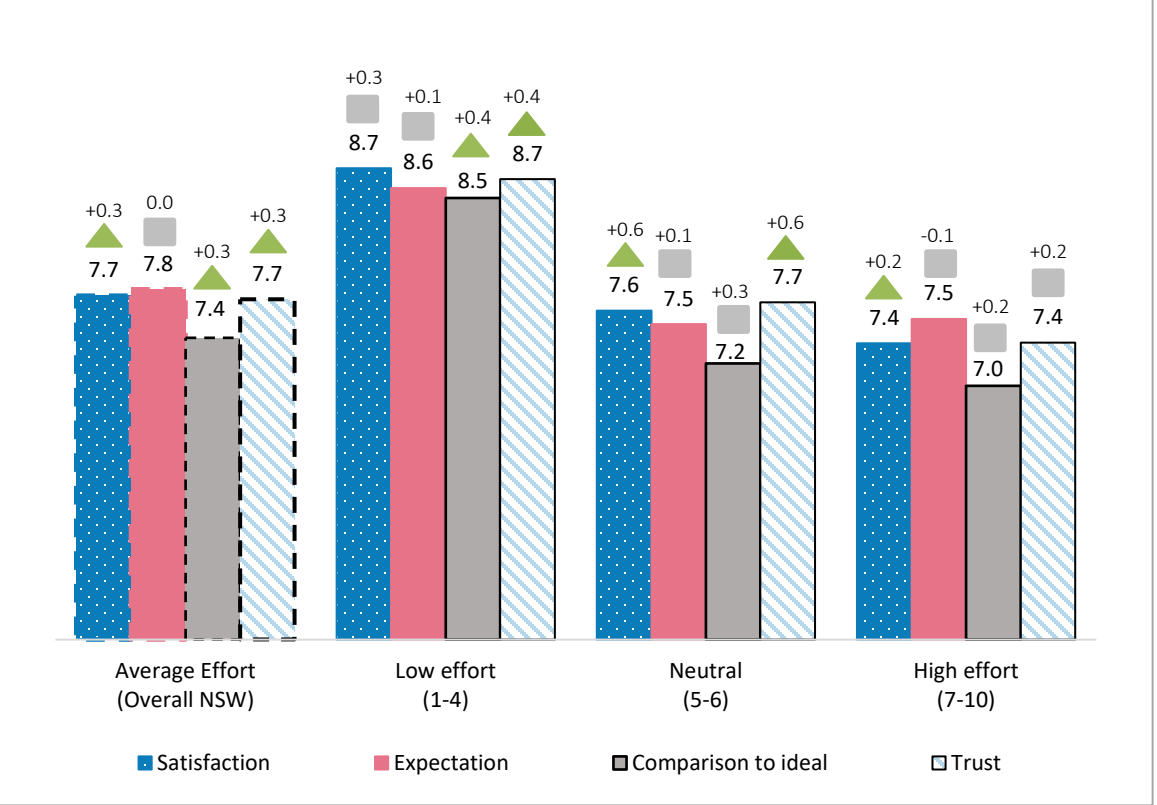


Figure 1.28: Comparison of effort to outcome measures (out of 10) – Business (n=1,430)

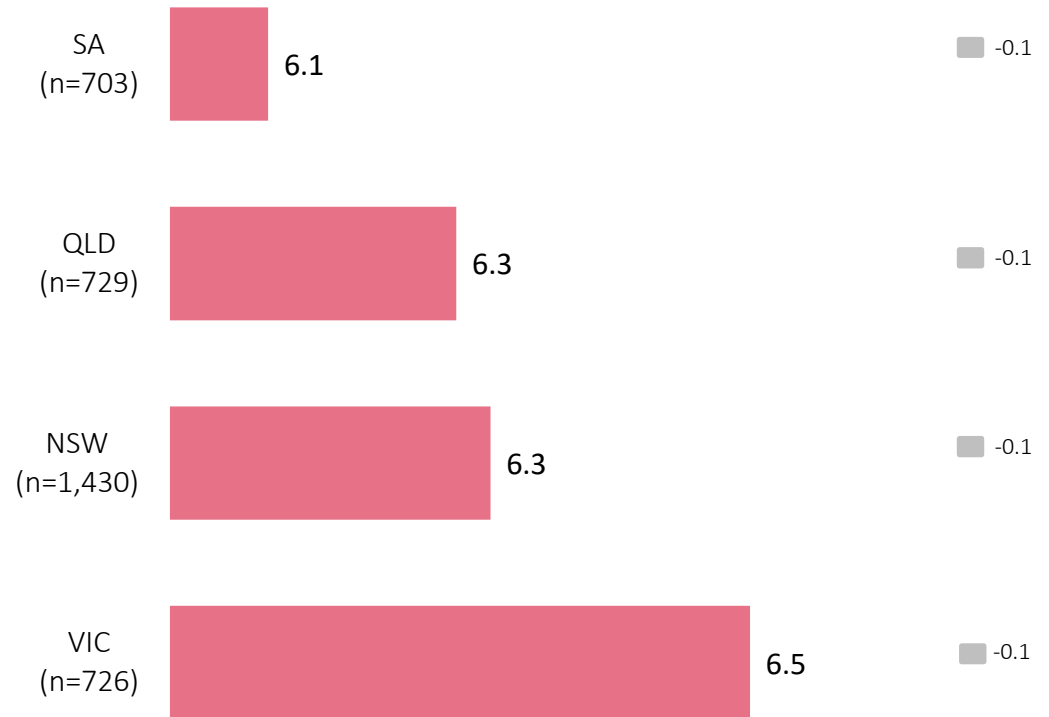


NSW has retained its third position in Customer Effort Score for businesses in 2020

Key Points

- All jurisdictions have remained relatively stable in their CES compared to 2019 with relative rankings unchanged
- SA continues to have the lowest CES of 6.1/10 and VIC has the highest CES of 6.5/10

Figure 1.29: Business CES by jurisdiction (out of 10)



The Business Customer Effort Score has remained stable across the different demographic cohorts from 2019 to 2020

Key Points

- **Business size:** Businesses with 20-199 employees experienced the highest effort of 6.8/10 and sole proprietors experienced the lowest effort
- **Region:** Businesses in metropolitan regions experienced higher effort than businesses in regional and rural areas
- **Industry:** Businesses in 'Information media and telecommunications' experienced the highest effort in dealing with NSW Government services
- **Revenue:** Businesses with annual revenue exceeding 2 million dollars saw the highest drop in effort compared to 2019

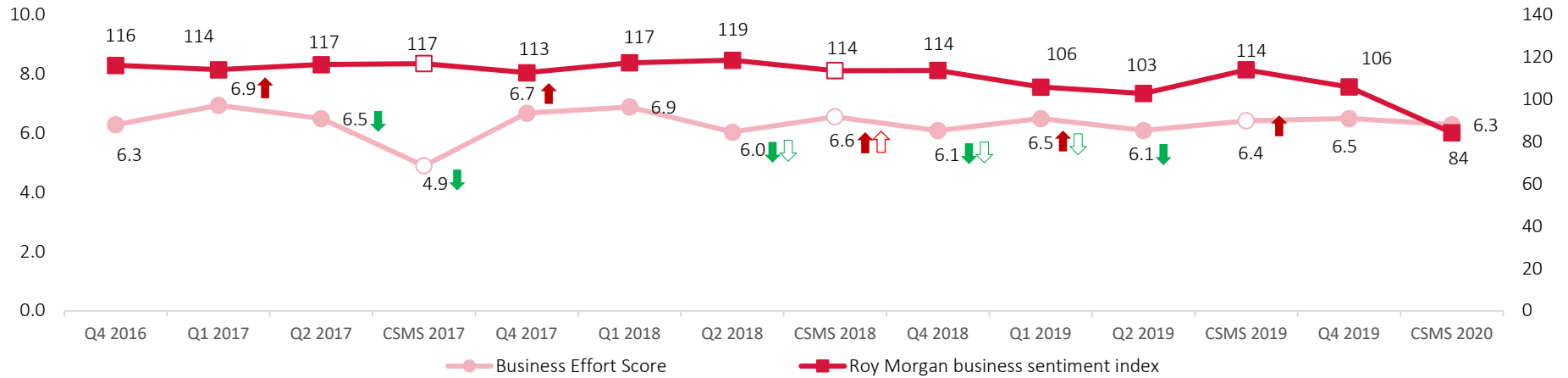
Figure 1.30: Business CES by demographic cohorts

	Highest effort (within demographic category)	Lowest effort (within demographic category)	Increase in effort since 2019	Decrease in effort since 2019
Business Size	20-199 employees (6.8/10)	Sole proprietor (6.0/10)	10 – 19 employees (6.7/10)	6 – 9 employees (6.2/10)
Region	Metropolitan (6.4/10)	Regional (6.1/10)	Rural (6.1/10)	Regional (6.1/10)
Industry*	Information media and telecommunications (7.2/10)	Manufacturing (5.5/10)	Agriculture, forestry and fishing (6.2/10)	Manufacturing (5.5/10)
Revenue	\$500,001 to \$2,000,000 (6.5/10)	Over \$2,000,000 (6.2/10)	\$50,001 to \$200,000 (6.3/10)	Over \$2,000,000 (6.2/10) ▼

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

Business effort has remained stable despite changes in Roy Morgan business sentiment index

Figure 1.31: Business Effort Score trend and Roy Morgan Index (Please refer to the footnote on slide 30 for details about the Roy Morgan Index)



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

NSW ranks third in the ease of starting a business** in 2020

Key Points

- SA and QLD have seen significant improvements in the 'ease of starting a business' score compared to 2019, and rank ahead of NSW
- Businesses in NSW with annual revenue over 2 million dollars have seen a significant improvement in ease of doing business. This aligns with a significant decline in effort experienced by this cohort (CES of 7.0/10 in 2019 vs. CES of 6.2/10 in 2020)

Figure 1.32: Ease of starting a business by jurisdictions (out of 10)

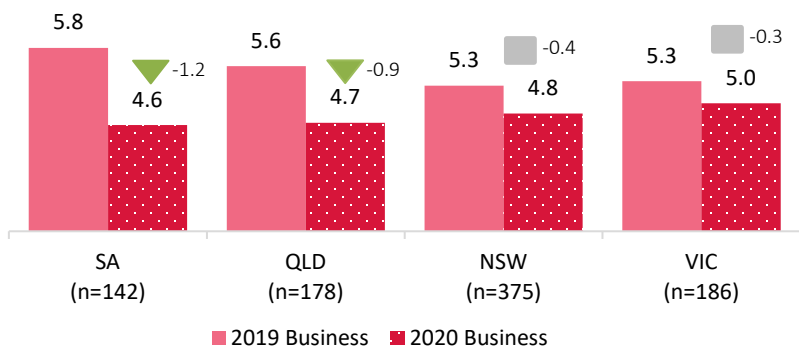


Figure 1.34: Ease of starting a business by region (out of 10) (NSW Only)

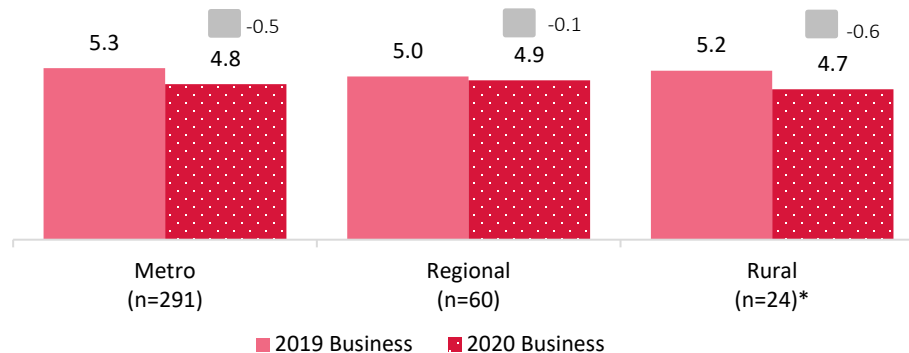


Figure 1.33: Ease of starting a business by business size (out of 10) (NSW Only)

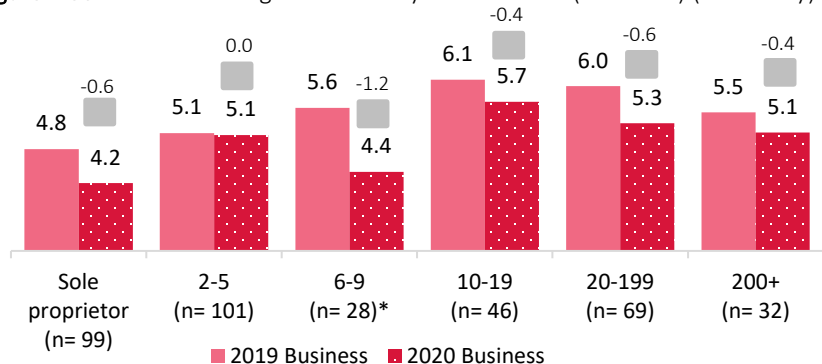
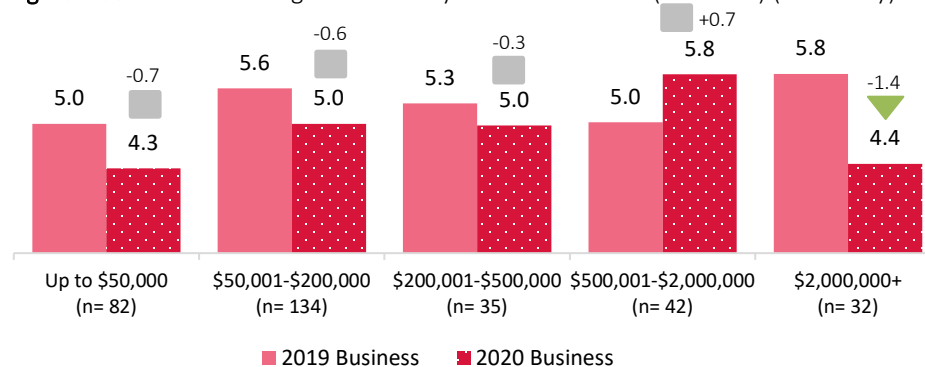


Figure 1.35: Ease of starting a business by business revenue (out of 10) (NSW Only)



**Businesses were asked to rate Government services on a scale of 1-10 with 1 being very easy and 10 being very difficult on "How easy or difficult do/did you find the process to start a business, in particular when engaging with [State] Government services?" A lower score indicates a better performance on this metric

*Note: n<30: interpret with caution

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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

Business trust in NSW Government services has increased significantly in 2020

Key Points

- 78% of businesses place high trust (7-10 out of 10) in NSW Government services in 2020 compared to 69% in 2019, a significant increase of 9% points
- The proportion of businesses placing low trust in NSW Government services in 2020 has declined significantly by 3% points from 10% in 2019 to 7% in 2020
- Businesses that place high trust in NSW Government services have higher satisfaction, expectation and comparison to ideal scores

Figure 1.36: Breakdown of overall trust - Business

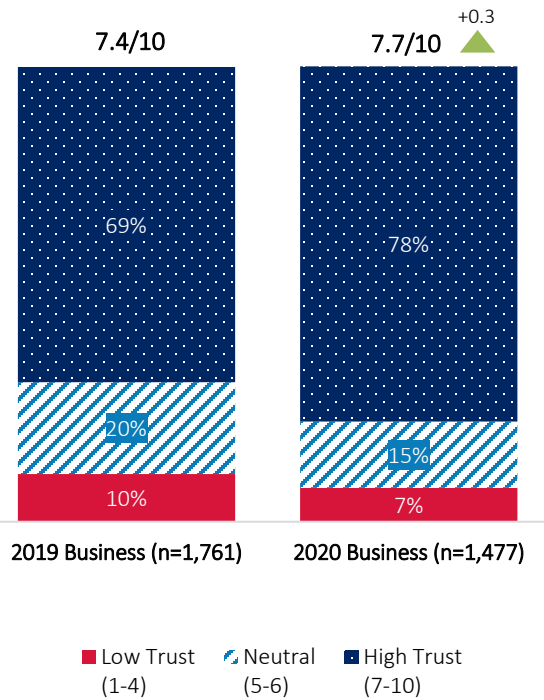
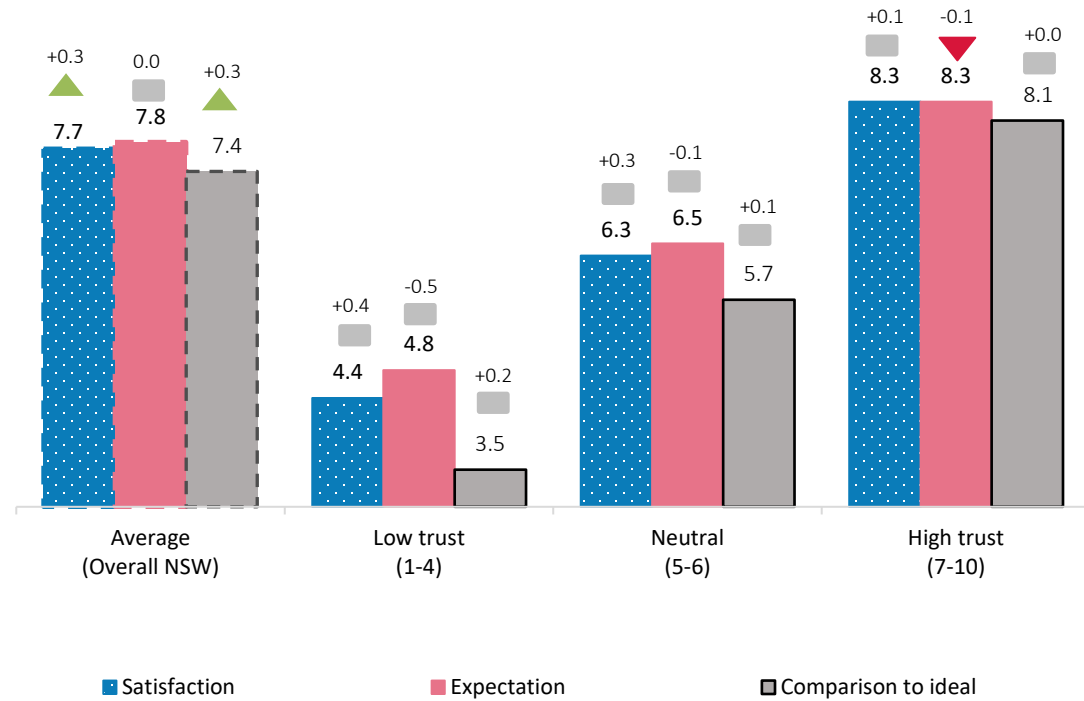


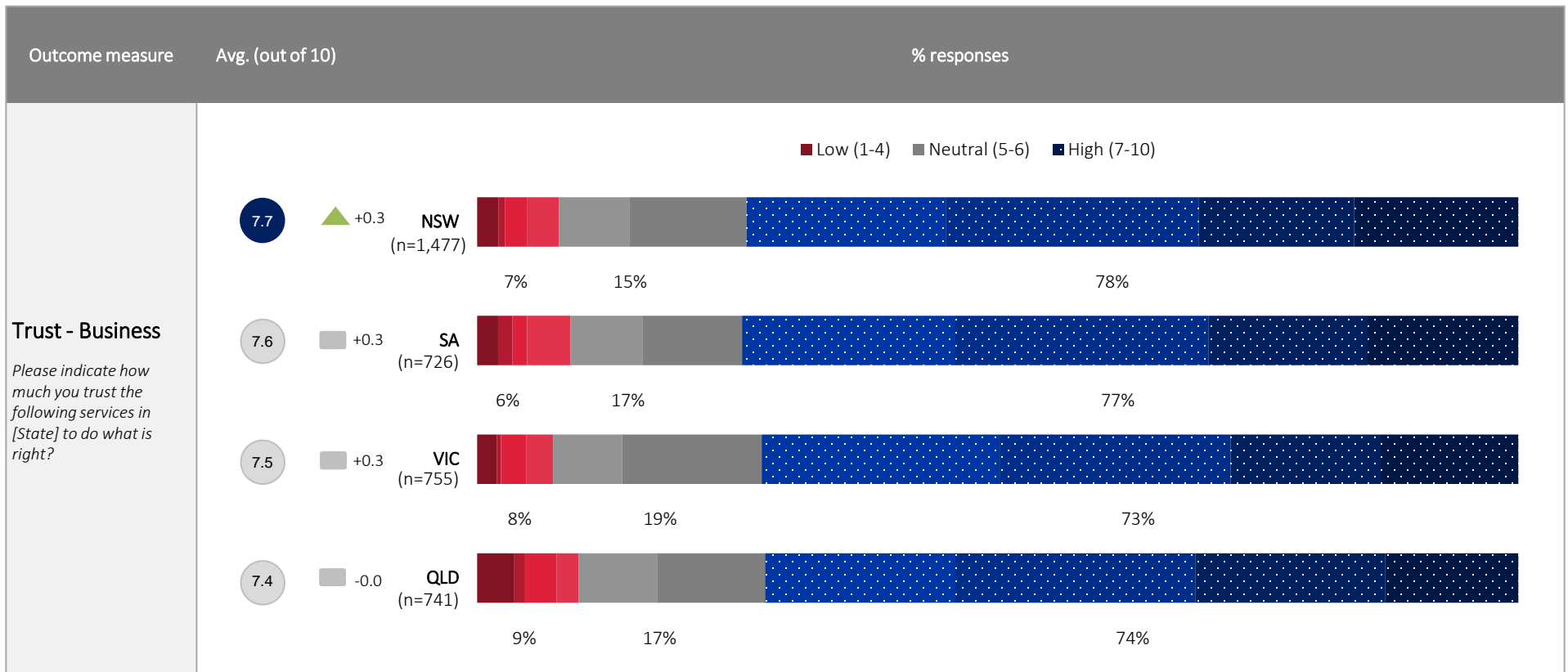
Figure 1.37: Comparison of overall trust to outcome measures (out of 10) – Business (n=1,477)



Business trust in NSW Government services has increased significantly in 2020 and NSW ranks first in trust across jurisdictions

Key Points

- NSW has the highest trust score of 7.7/10, a significant increase of 0.3 points compared to 2019



2. Drivers of Satisfaction and Service Attributes

Consumer



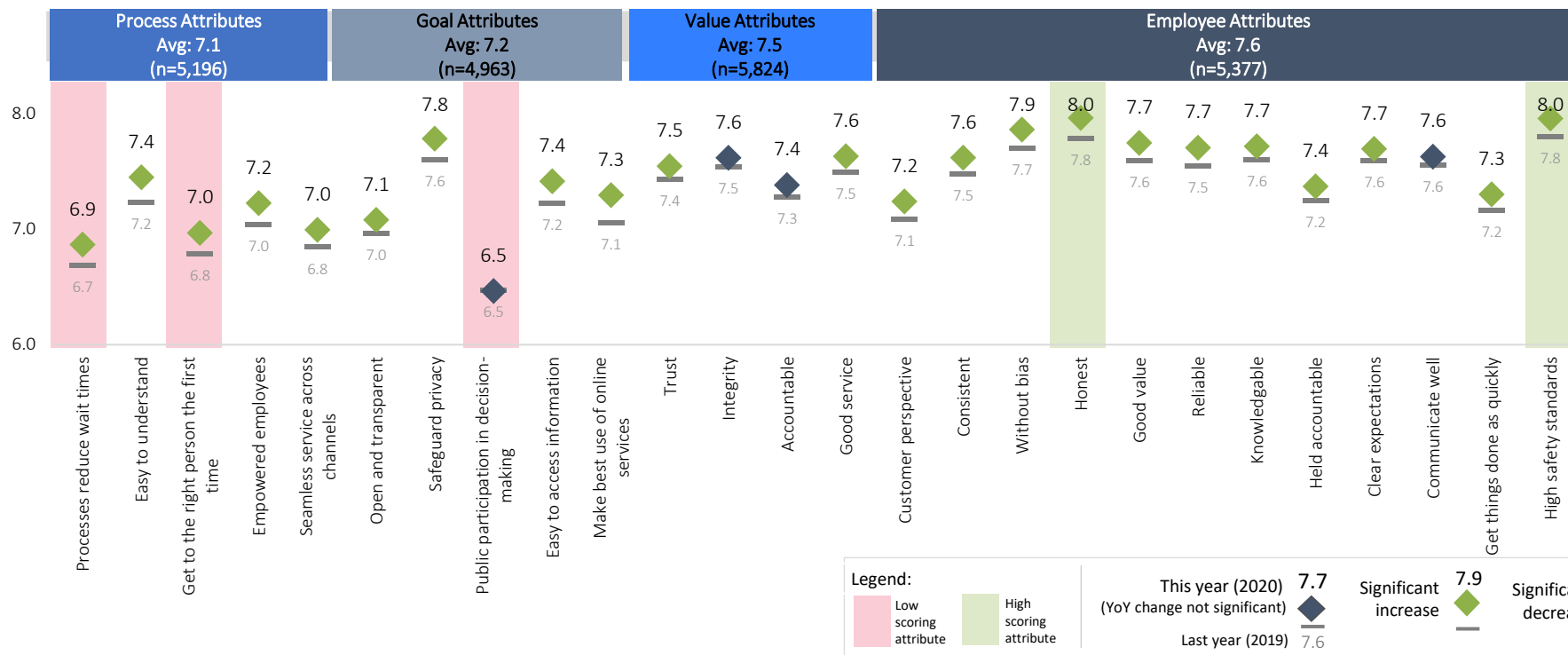


NSW Government services have seen an increase in average scores for process, goals, values and employee attributes in 2020

Key Points

- Employee related attributes have the highest average score of 7.6/10. Compared to 2019, scores have increased significantly for 11 of the 12 employee attributes with 'are honest' and 'deliver high safety standards' having the highest scores of 8.0/10
- Process related attributes have two of the three lowest scoring attributes: 'processes are designed to reduce wait times (6.9/10) and 'I can get to the right person the first time' (7.0/10)
- While process related attributes have the lowest average score of 7.1/10, it is an improvement over the 2019 score of 6.9/10
- Consistent with the last 4 years, 'encourage public participation in decision making', a goal related attribute, continues to have the lowest score of 6.5/10 in 2020

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



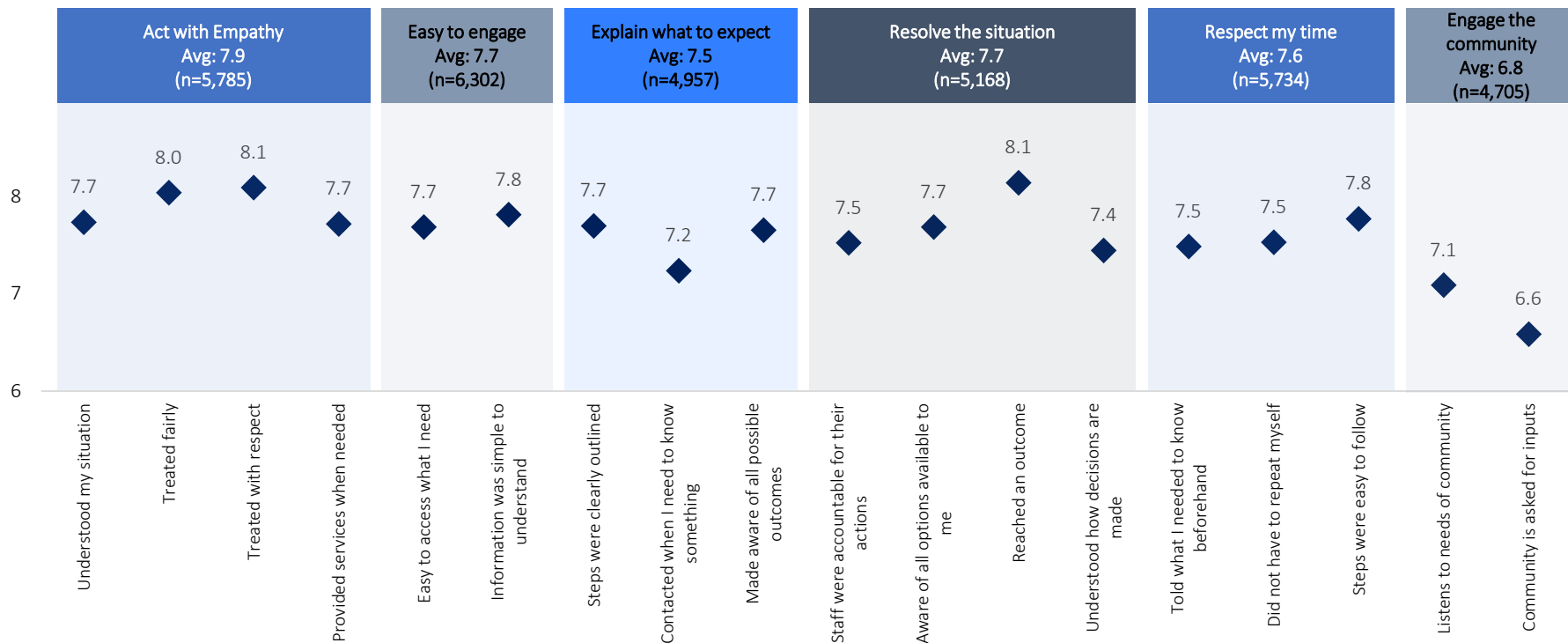


The Customer Commitment of 'Act with empathy' has the highest average score driven by consumers being treated fairly and with respect

Key Points

- *Act with empathy* related attributes of 'I was treated fairly' (8.0/10) and 'I was treated with respect' (8.1/10) are the top rated attributes, along with 'I reached an outcome, positive or negative' (8.1/10) – an attribute related to *Resolve the situation*
- *Engage the community* has the lowest average score of 6.8/10 with the attribute 'The community is asked how the service should be provided' having the lowest score of 6.6/10. This is consistent with the Goal attribute of 'Encourage public participation in decision making' also having the lowest score
- *Explain what to expect* attribute of 'I was contacted when I needed to know something' has the lowest score of 7.2/10 within this Customer Commitment

Figure 2.2: Average score of Customer Commitment attributes (out of 10)



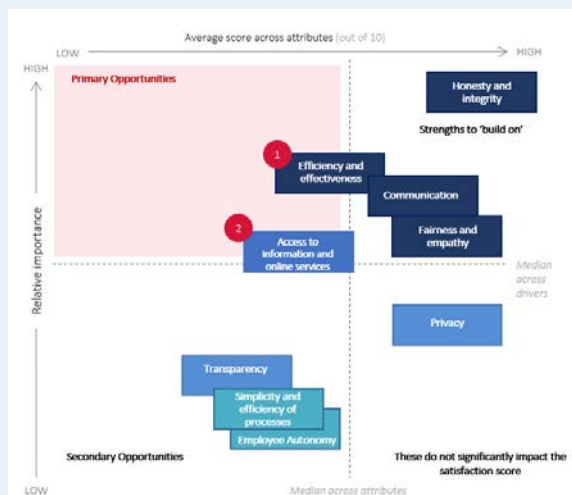


'Ease' of processes and 'access to information and online services' are identified as primary opportunity areas in 2020 to positively impact consumer satisfaction

Key Points

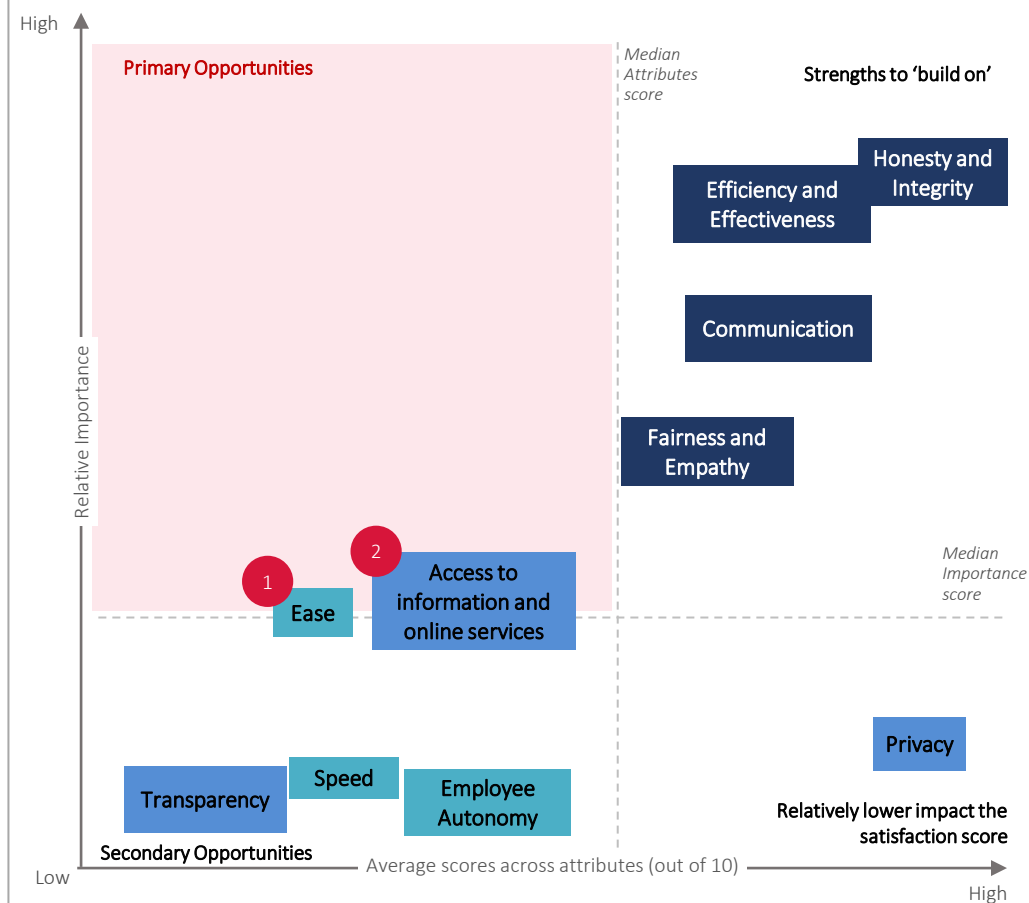
- Designing processes that are 'easy' to understand and seamless to navigate is identified as a new primary opportunity area in 2020
- Consistent with 2019, giving consumers 'access to information and online services' continues to be a primary opportunity area
- The importance of both these drivers is further enhanced in context of COVID-19, where 21% of respondents have reported working from home more often due to the pandemic and 17% have had to self-isolate
- 'Efficiency and effectiveness', which has been a priority area since 2015 has been identified as a strength to build on in 2020 along with 'honesty and integrity', 'fairness and empathy' and 'communication' of employees

2019 Consumer driver analysis



Note given the compositions of the employee and process drivers have changed compared to 2019, no direct comparison can be made to the relative change in performance for the drivers year-on-year

Figure 2.3: Importance versus performance against each of the drivers of satisfaction in 2020 for consumers (n=3,501)



Please refer to Appendix II: Further Technical Information for details on the driver analysis methodology

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

2. Drivers of Satisfaction and Service Attributes

Business

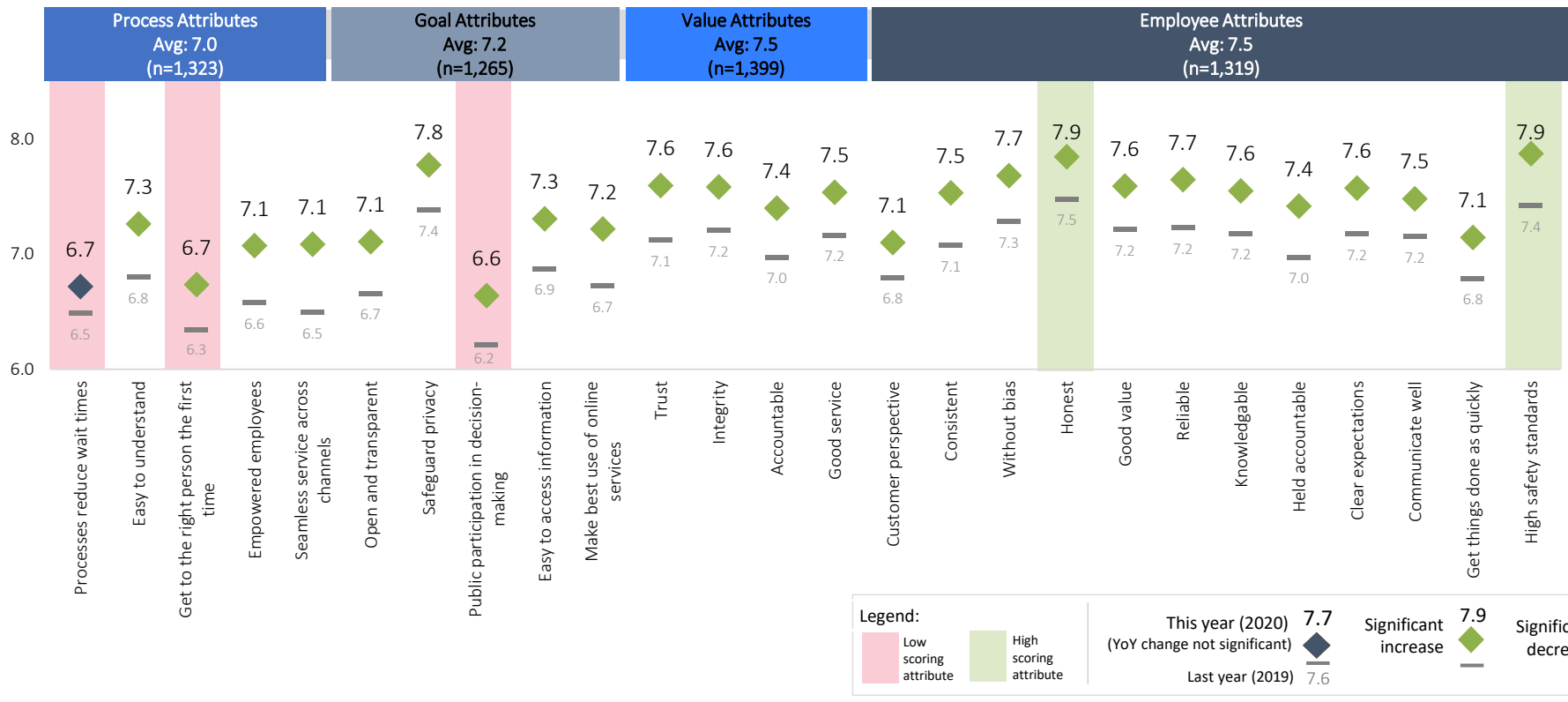


For businesses, NSW Government services have improved their performance significantly across all but one attribute in 2020

Key Points

- Employee and Value related attributes have the highest average score of 7.5/10 with the employee attributes 'are honest' and 'deliver high safety standards' having the highest scores of 7.9/10
- Two of the three lowest scoring attributes are process related: 'processes are designed to reduce wait times' (6.7/10) and 'I can get to the right person the first time' (6.7/10)
- Process related attributes have the lowest average score of 7.0/10 which is an improvement compared to the 2019 score of 6.5/10
- Consistent with 2019, 'Encourage public participation in decision making' (6.6/10) continues to remain the lowest rated attribute despite a significant increase in the average score

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

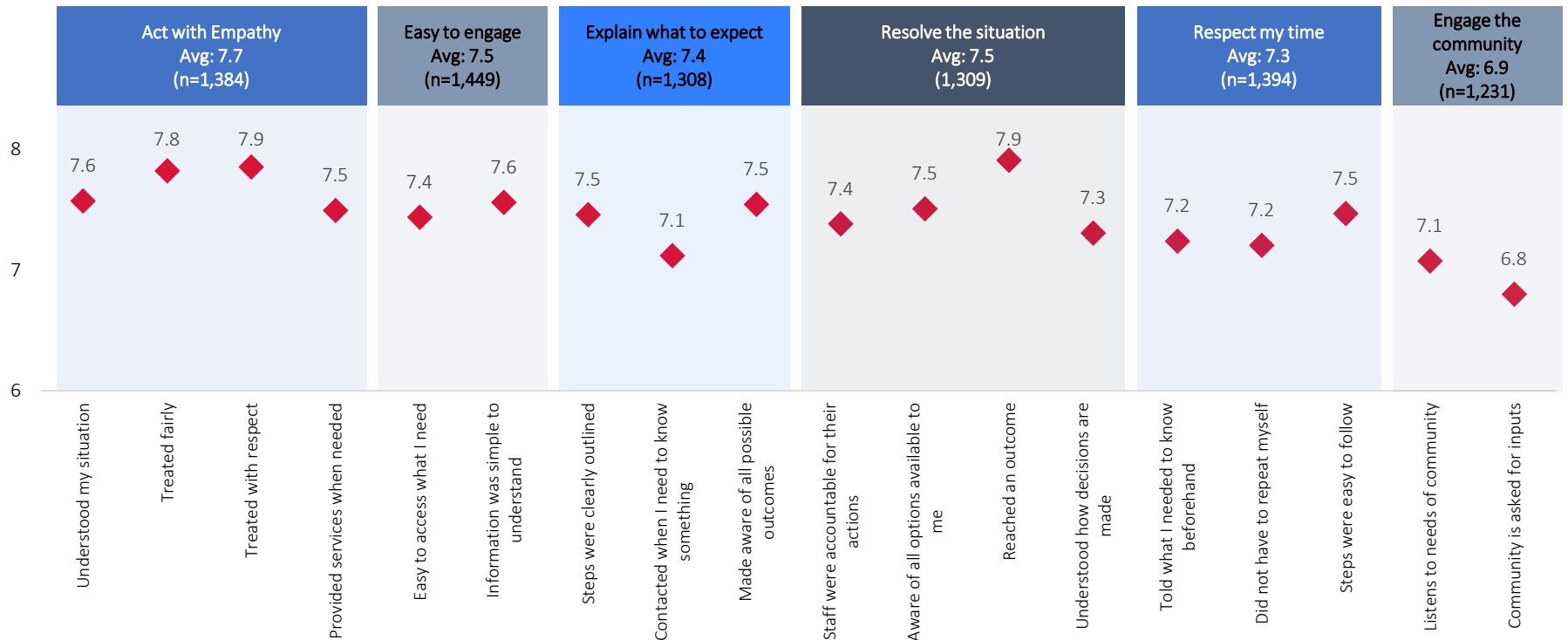


Among businesses, 'Act with empathy' has the highest average score

Key Points

- Attributes pertaining to *Act with empathy*, 'I was treated fairly' (7.8/10) and 'I was treated with respect' (7.9/10) are two of the top three rated attributes
- 'I reached an outcome, positive or negative' (7.9/10), an attribute related to *Resolve the situation*, is the second highest rated attribute
- *Engage the community* has the lowest average score of 6.9/10 with the attribute 'The community is asked how the service should be provided' having the lowest score of 6.8/10. This is consistent with the Goal attribute of 'Encourage public participation in decision making' also having the lowest score
- *Explain what to expect* attribute of 'I was contacted when I needed to know something' has the lowest score of 7.1/10 within this Customer Commitment

Figure 2.5: Average score of Customer Commitment attributes (out of 10)

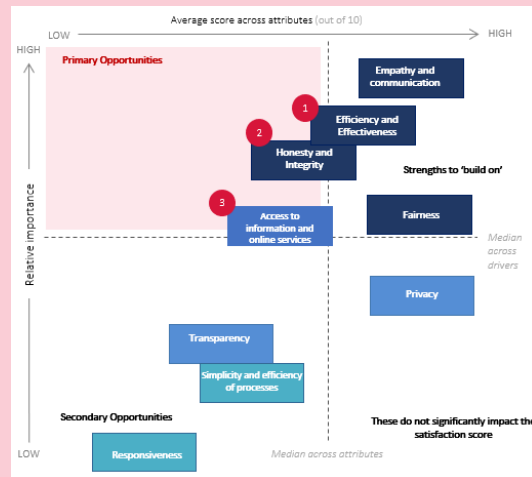


'Speed of service' is identified as a primary opportunity area in 2020 to positively impact business satisfaction

Key Points

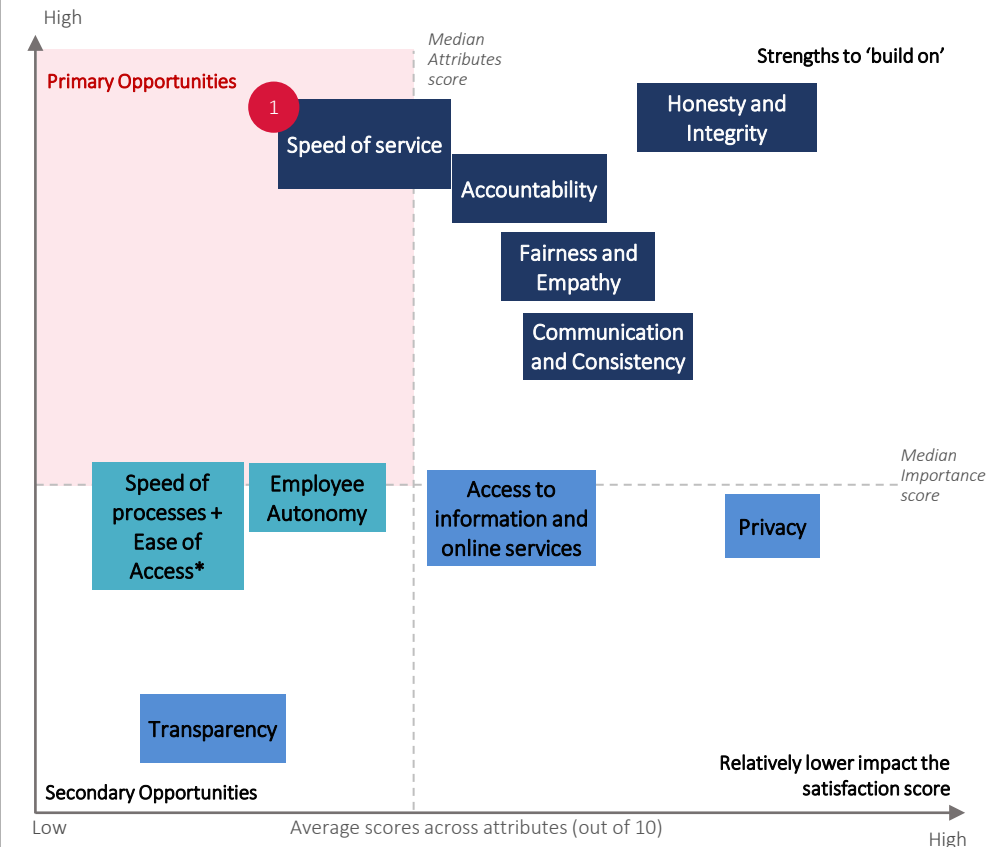
- 'Speed of service' from NSW Government services employees has been identified as a primary opportunity area
- 'Speed of processes' has been identified as a key secondary opportunity due to its moderate importance but low average attribute score
- Rising importance of speed may be related to the impacts of COVID-19: 40% of business respondents report facing financial hardship due to the COVID-19 pandemic, 37% report having to work reduced hours and 30% report having to work from home more often
- 'Fairness and empathy', 'communication and consistency', 'accountability', 'honesty and integrity' are areas of strength to build on

2019 Business driver analysis



Note given the compositions of the employee and process drivers have changed compared to 2019, no direct comparison can be made to the relative change in performance for the drivers year-on-year

Figure 2.6: Importance versus performance against each of the drivers of satisfaction in 2020 for businesses (n=1,047)



*both drivers have the same relative importance scores



3. Contact Method



Use and preference for online as a contact method has increased significantly in 2020 compared to 2019 for both consumers and businesses

Key Points

- While 'in person' interactions have declined significantly for consumers compared to 2019, it remains the most used and most preferred contact method in 2020
- While 'in person' and phone continue to be the most used contact methods by businesses, online and email have taken over as the most preferred contact methods in 2020
- Preference for online channels has increased significantly for both consumers and businesses, a trend that may have been amplified by the COVID-19 pandemic. 43% of consumers and 41% of businesses impacted by COVID used online as a contact method during COVID-19 restrictions* compared to 33% of both consumers and businesses who used online channels before COVID-19 restrictions

Figure 3.1: Contact method used - Consumer

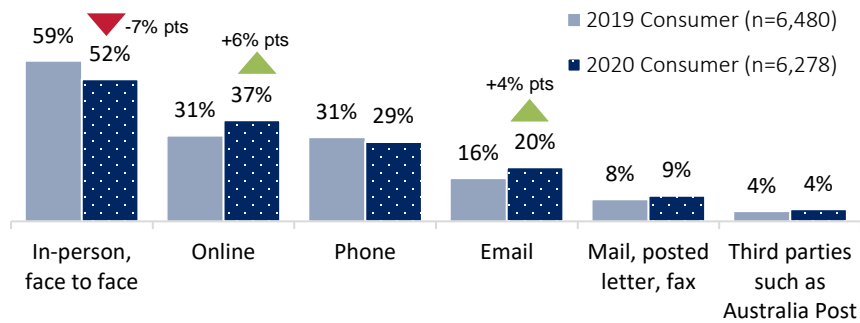


Figure 3.2: Contact method used - Business

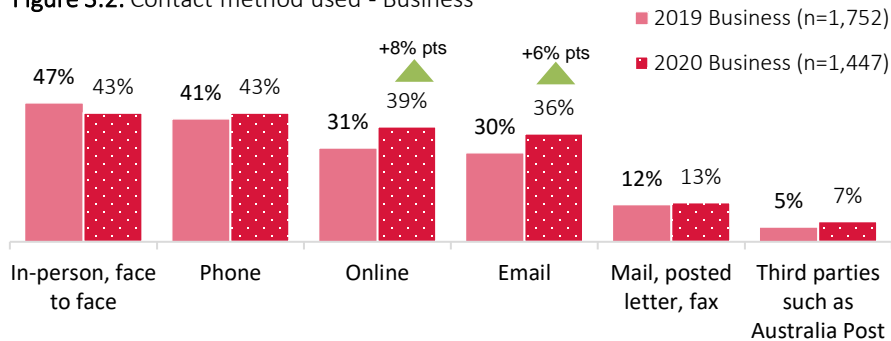


Figure 3.3: Most preferred contact method - Consumer

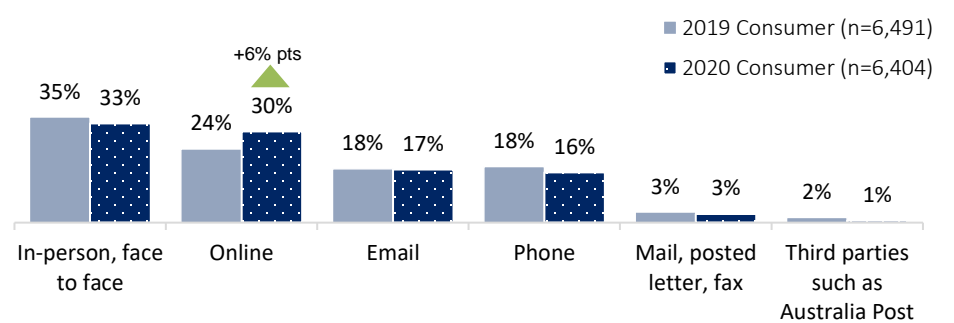
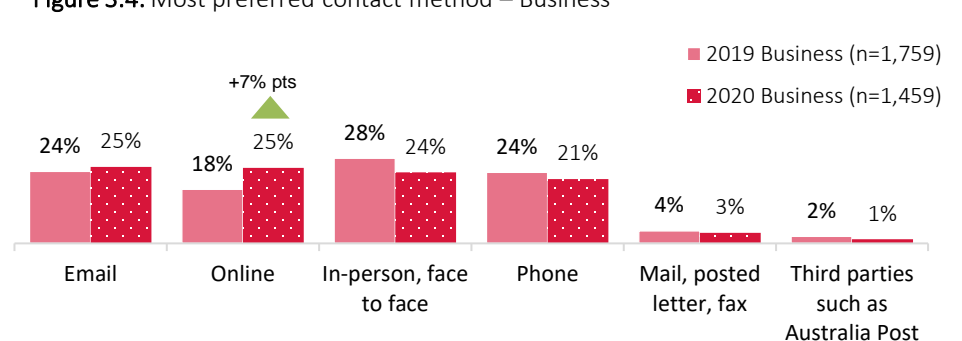


Figure 3.4: Most preferred contact method - Business



Consumers and businesses who use online and/or in-person interactions experience relatively higher overall satisfaction and lower overall effort in their interactions with NSW Government services compared to those who use other channels

Key Points

- Satisfaction and expectation scores are highest for consumers who use online and ‘in person’ channels to interact with NSW Government services. These consumers also experience the lowest effort
- Businesses who use third party channel experience the highest overall satisfaction. Businesses who use online and ‘in person’ experience the lowest effort
- The use of email by consumers and businesses has increased significantly however, email users experience the second highest effort among consumers and the highest effort among businesses

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

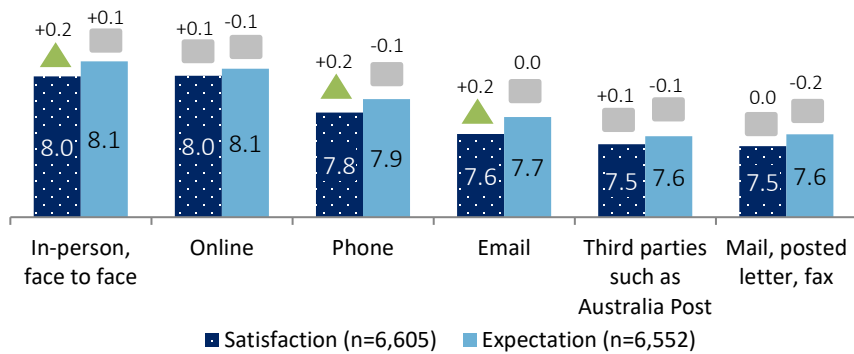


Figure 3.6: Satisfaction and expectation by contact method used (out of 10) – Business

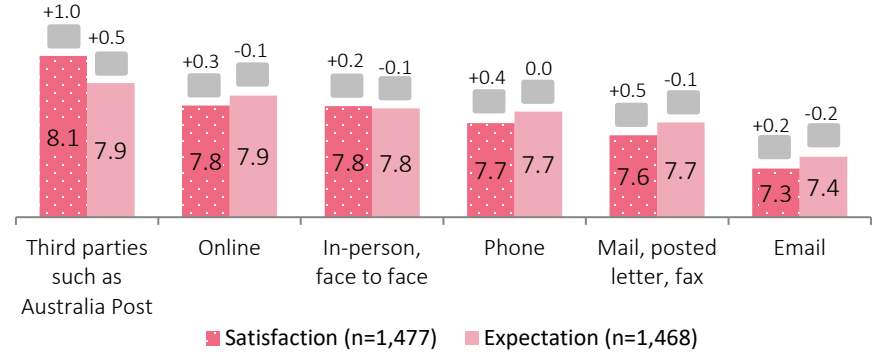


Figure 3.7: Average effort put forth by the contact method used (out of 10) - Consumer

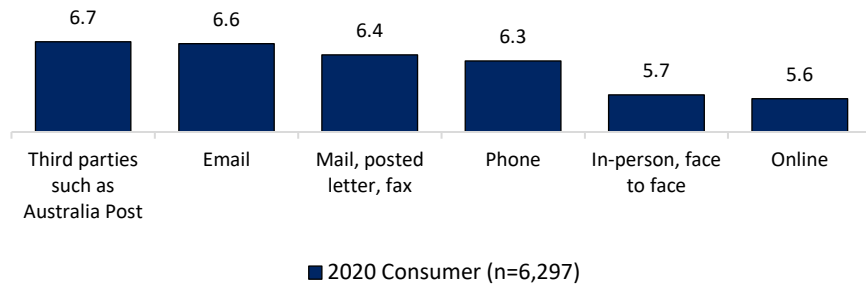
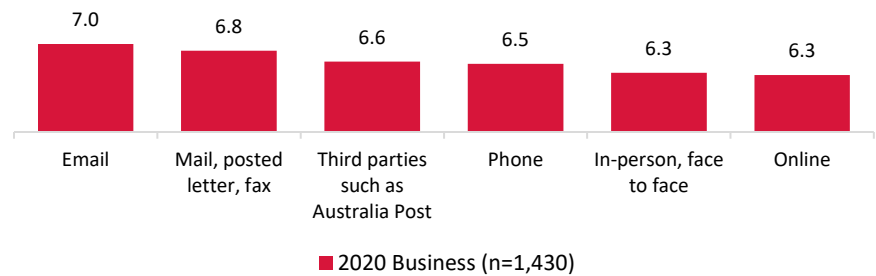


Figure 3.8: Average effort put forth by the contact method used (out of 10) - Business



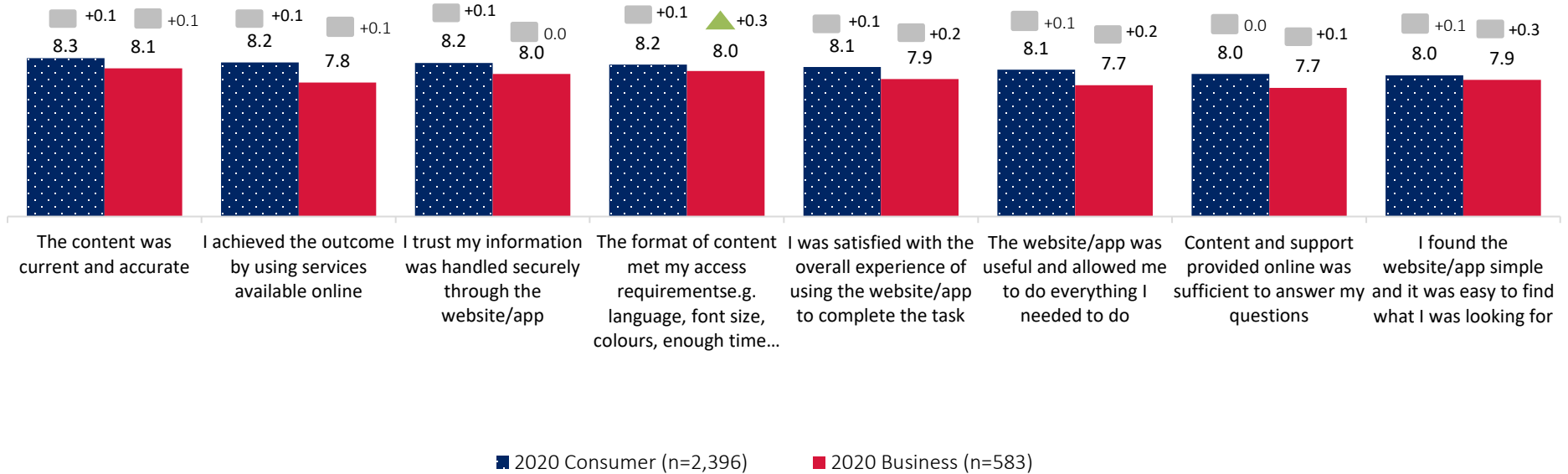


Consumers and businesses who go online generally find the content to be current, accurate and accessible. They trust their information to be handled securely

Key Points

- *Current and accurate content* is rated the highest by both consumers (8.3/10) and businesses (8.1/10)
- *Achieving outcomes by using services available online* is the second highest rated attribute by consumers (8.2/10)
- *Secure information handling* (8.0/10) and *format of content meeting access requirements* (8.0/10) are the other top rated attributes by businesses

Figure 3.9: Attributes of online usage (out of 10)

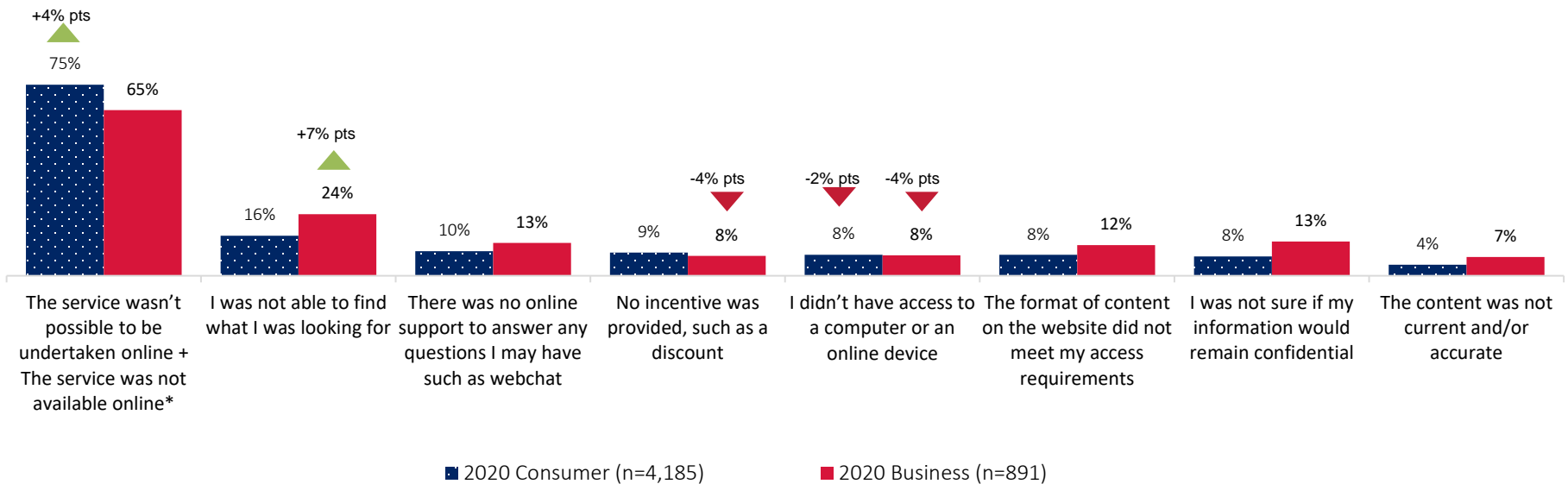


Not being able to undertake services online continues to be the main reason for not using online channels for both consumers and businesses

Key Points

- The proportion of businesses who reported they were not able to find what they were looking for increased significantly from 17% in 2019 to 24% in 2020
- The proportion of consumers and businesses not having access to computers or online devices has declined significantly in 2020 compared to 2019

Figure 3.10: Reasons for not going online



*Sum of respondents who selected 'The service wasn't possible to be undertaken online' and 'The service was not available online'

NSW consumers and businesses have the highest usage of online as a contact method compared to other jurisdictions in 2020

Key Points

Consumer:

- NSW Consumers have the highest usage of online contact methods (37%) compared to other jurisdictions
- Usage of phone (29%), mail (9%) and third parties (4%) is the lowest in NSW compared to other jurisdictions
- NSW ranks third in the usage of email (20%), ahead of SA
- Usage of 'in person' is behind QLD and on par with SA at 52%

Business:

- NSW Businesses have the highest usage of online contact methods (39%) compared to other jurisdictions
- They have lower usage of 'in person' (43%) when compared to QLD (45%) and SA (48%)
- Phone (43%) usage is on par with SA and QLD leads the uptake of this contact method (46%)
- Email (36%) usage is on par with QLD and VIC leads the usage of this method (42%)
- NSW businesses have the lowest usage of mail (13%) and third parties (7%) compared to other jurisdictions

Figure 3.11: Contact method used by jurisdiction - Consumer

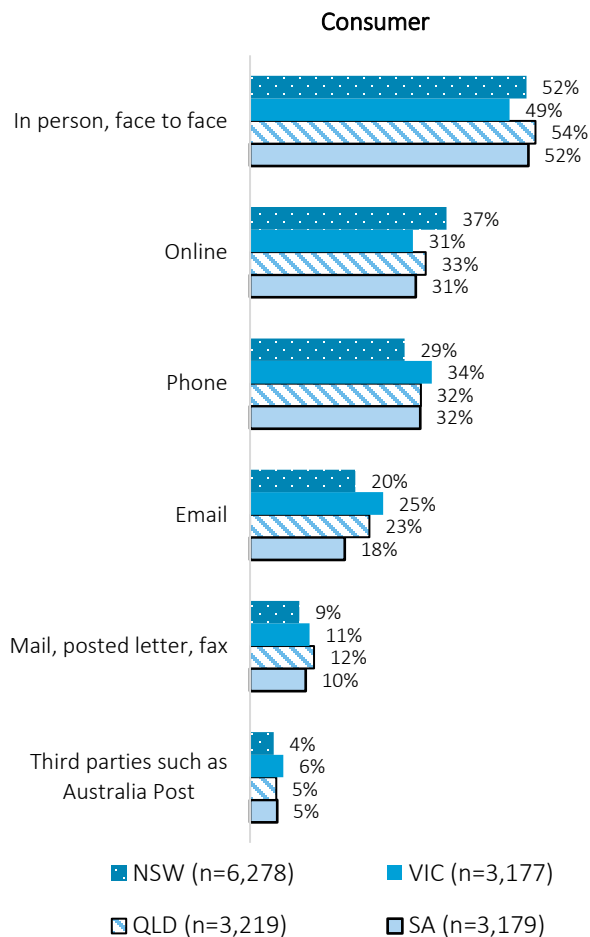
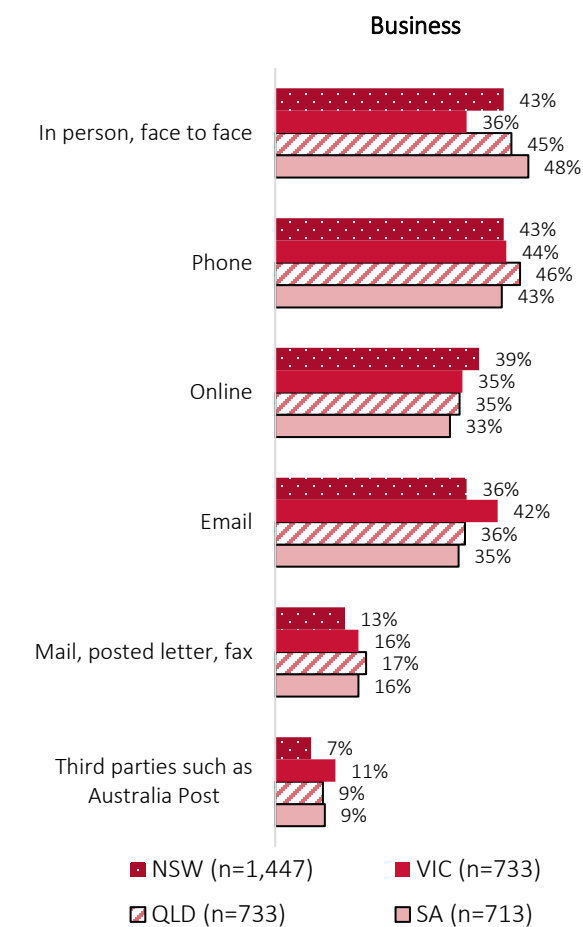


Figure 3.12: Contact method used by jurisdiction - Business





4. Brand Perception





NSW Public Service overall has the highest brand perception among consumers compared to other industries

Key Points

- The brand perception of NSW Public Service overall increased significantly from 7.1/10 in 2019 to 7.3/10 in 2020
- Except airlines and local council, all other industries, including Federal government (6.6/10 in 2020 vs. 5.7/10 in 2019) saw significant improvement in brand perceptions among NSW consumers

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

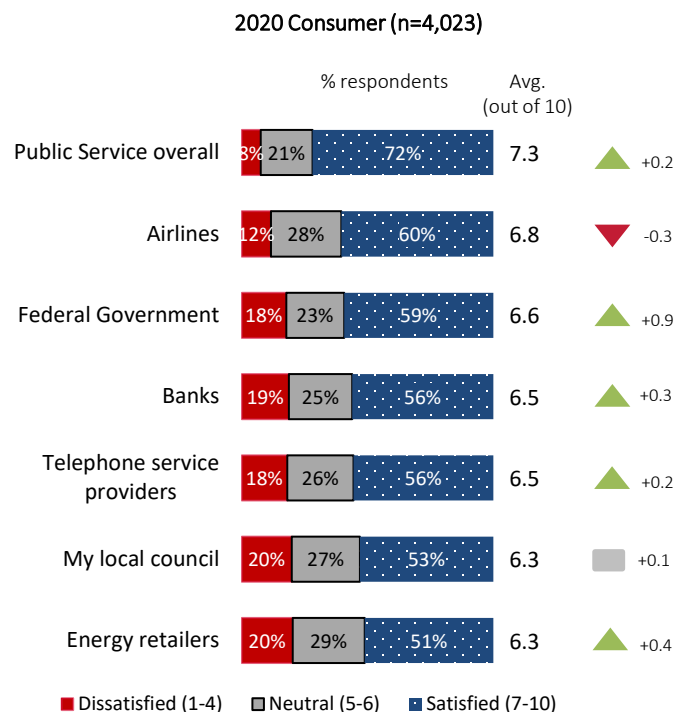
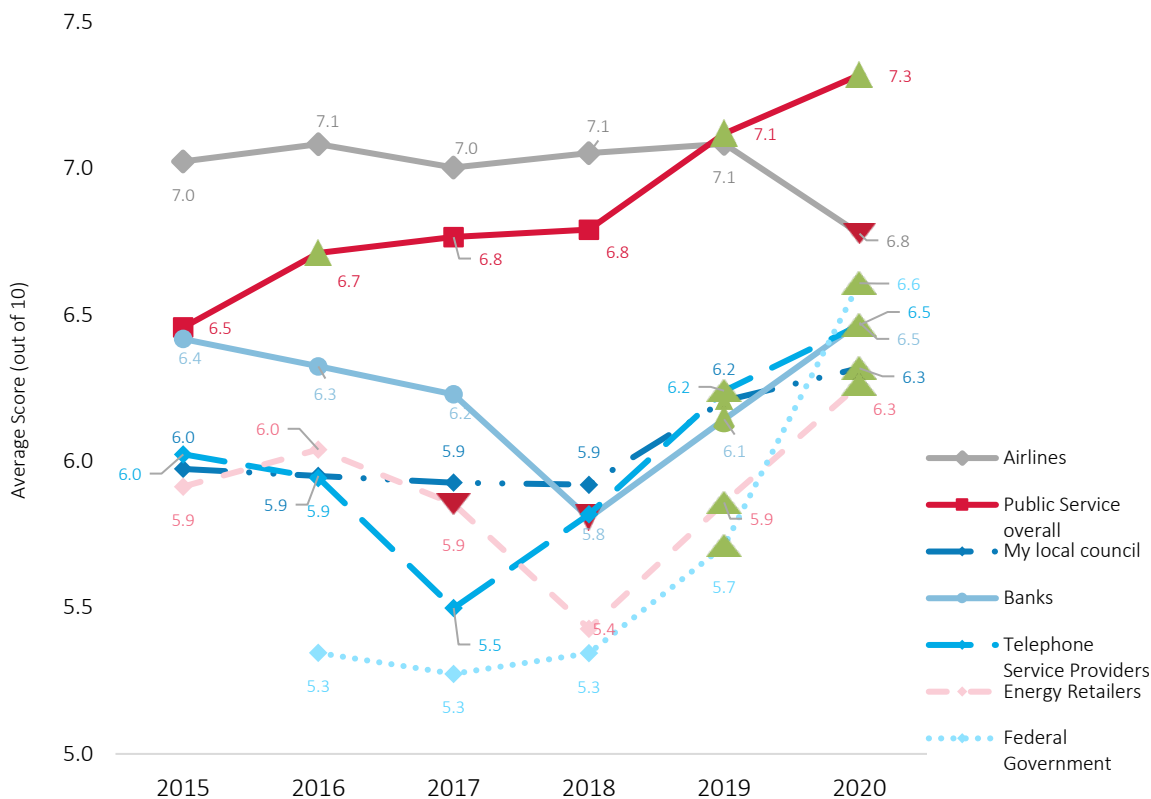


Figure 4.2: Brand perceptions of industries and public services – Consumers (out of 10)



NSW Public Service overall has the highest brand perception amongst businesses compared to other industries

Key Points

- NSW Public Service overall overtook Airlines in having the highest brand perception among NSW businesses, increasing by +0.4 points in average perception from 6.9/10 in 2019 to 7.3/10 in 2020
- Except airlines, all other industries, including Federal government (6.7/10 in 2020 vs. 6.0/10 in 2019) and local councils (6.5/10 in 2020 vs. 6.1/10 in 2019) saw significant improvement in brand perceptions among NSW businesses

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

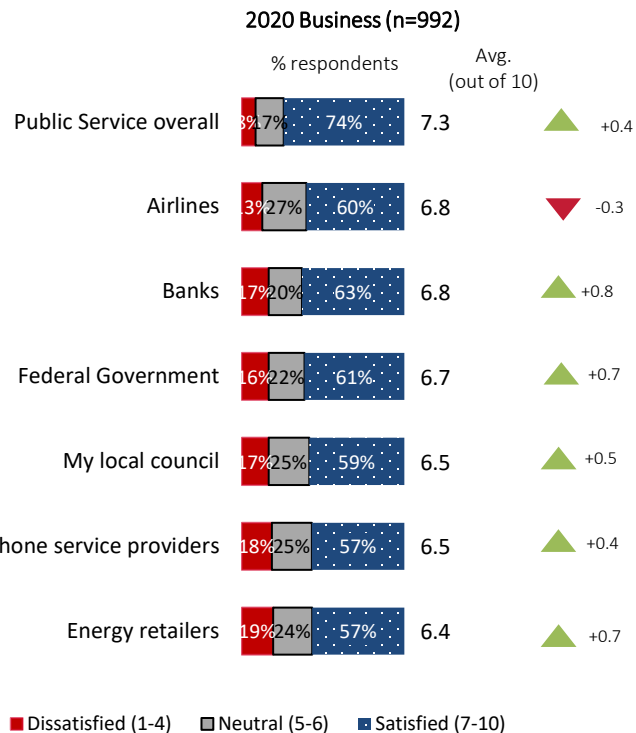
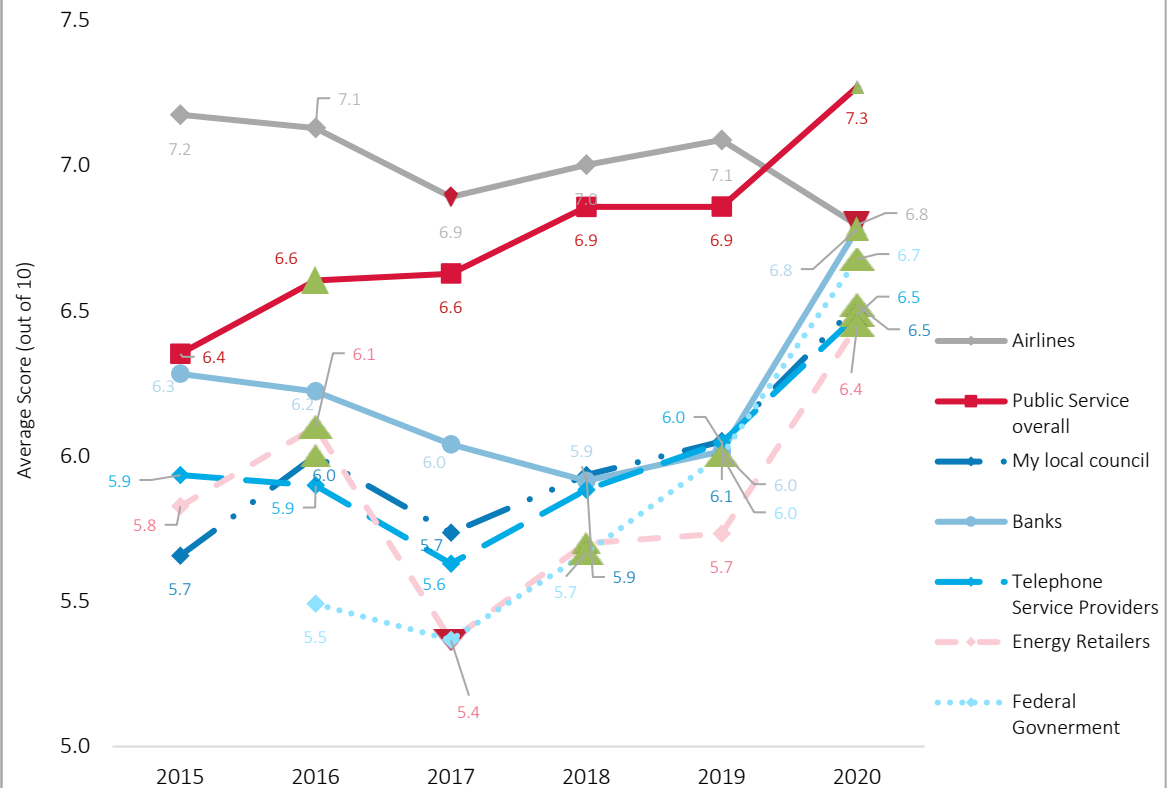


Figure 4.4: Brand perceptions of industries and public services – Business (out of 10)



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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



Consumers aged over 65 have the most positive perception of NSW Public Service overall

Key Points

- **Consumers:** Consumer cohorts with the highest perception scores for NSW Public Services overall are 65+, living in regional areas, retired, male and earning between \$30,000-\$50,001 per annum
- **Businesses:** Business cohorts with the highest perception scores for NSW Public Services overall are those who employ 6-9 employees, located in metropolitan regions, from the Administrative and support services industry and with a revenue of \$200,001 - \$500,000 per annum
- Perception scores among small businesses (6-9 employees) and ‘accommodation and food services’ has increased significantly in 2020 compared to 2019

Figure 4.5: Brand score by demographic cohorts – Consumer (out of 10) (n=4,023)

Figure 4.6: Brand score by demographic cohorts – Business (out of 10) (n=992)

	Highest brand score (within demographic category)	Lowest brand score (within demographic category)	Biggest change in brand score (within demographic category)
Age	65 years + (7.8/10)	45-54 years (6.9/10)	35-44 years (+0.4) ▲
Region	Regional (7.6/10)	Metropolitan (7.3/10) ▲	Metropolitan (+0.2) ▲
Employment status	Retired (7.7/10)	Not working (6.8/10)	On maternity/ paternity leave (+0.8)
Gender	Males (7.4/10) ▲	Females (7.3/10)	Males (+0.3) ▲
Income	\$30,001 to \$50,000 (7.4/10)	Over \$180,000 (7.2/10)	Up to \$30,000 (+0.4) ▲

	Highest brand score (within demographic category)	Lowest brand score (within demographic category)	Biggest change in brand score (within demographic category)
Business size	6-9 employees (7.6/10) ▲	Sole proprietor (6.6/10)	6-9 employees (+0.9) ▲
Region	Metropolitan (7.3/10) ▲	Regional (7.0/10)	Rural (+0.5)
Industry*	Administrative and support services (7.8/10)	Education and training (6.5/10)	Accommodation and food services (+1.4) ▲
Revenue	\$200,001 to \$500,000 (7.6/10)	Up to \$50,000 (7.2/10)	\$500,000 - \$2,000,000 (+0.6)



The 'Public Service' brand has the highest perception among consumers and businesses in all jurisdictions. Compared to other jurisdictions, NSW Public Service overall has the highest perception with NSW consumers and businesses

Key Points

- Perceptions of state Public Services has improved significantly for consumers in every state except VIC and for businesses in every state except QLD
- NSW Public Service has the highest score across jurisdictions of 7.3/10 for both consumers and businesses across all jurisdictions while perceptions of airlines have declined significantly across the board
- Perceptions of Federal government and banks have also improved significantly for both consumers and businesses across all jurisdictions while perceptions of airlines have declined significantly across the board

Figure 4.7: Comparison of Public Service brand perceptions across jurisdictions

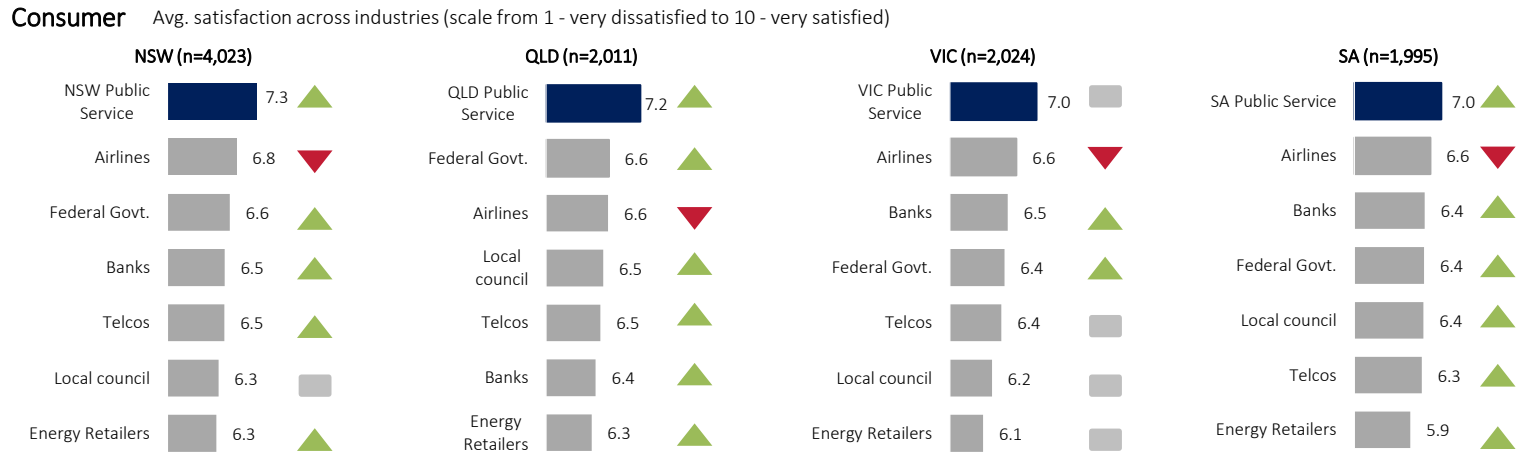
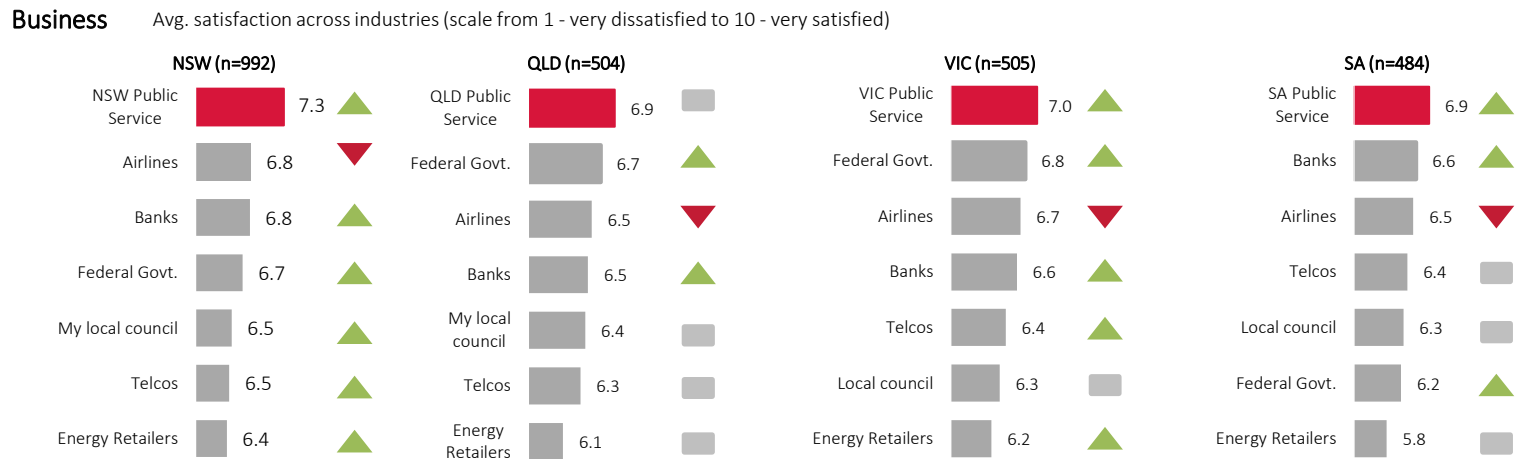


Figure 4.8: Comparison of Public Service brand perceptions across jurisdictions



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)

Results are subject to rounding

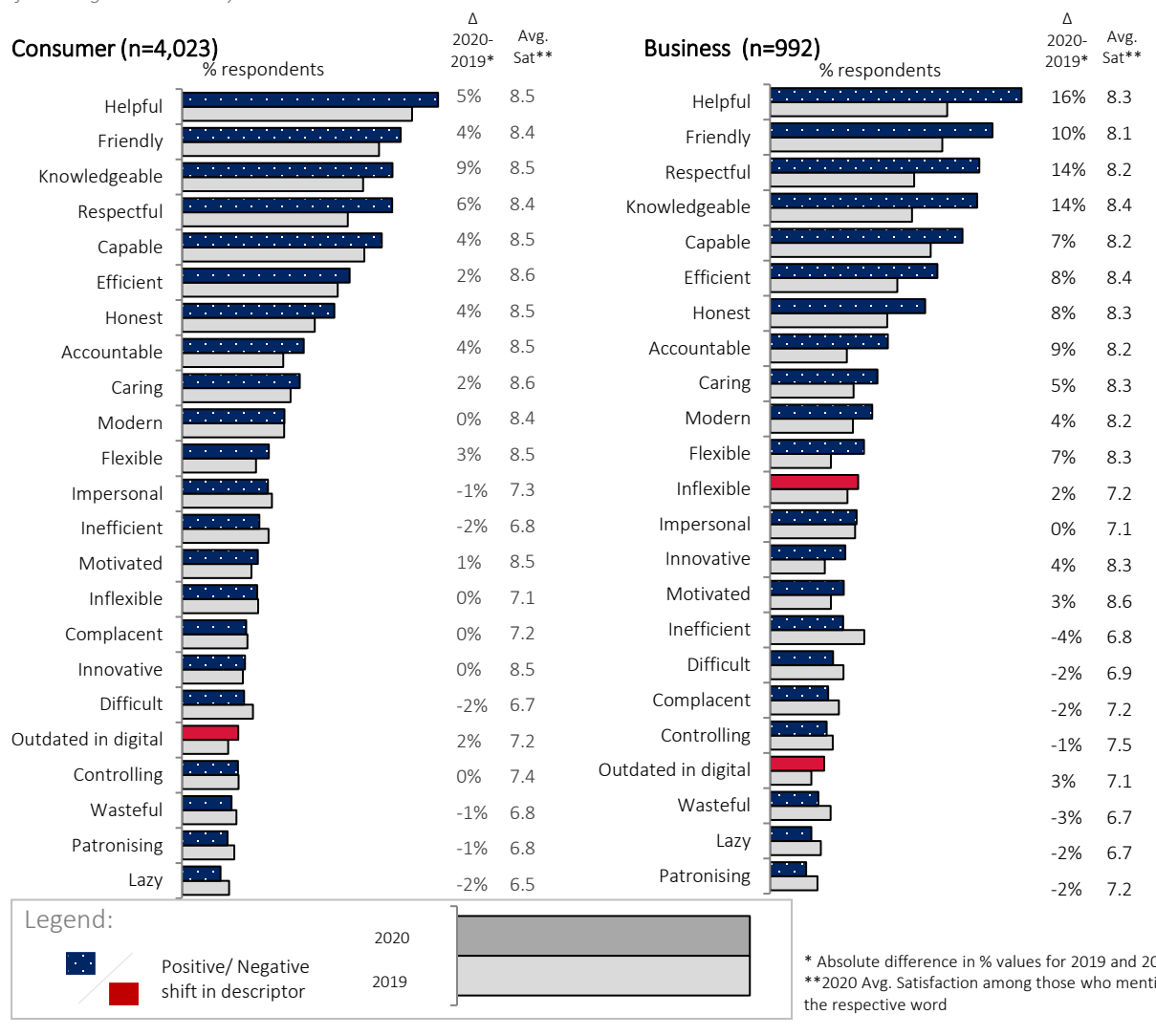
Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

‘Helpful’, ‘friendly’ and ‘knowledgeable’ are the top three words used to describe the NSW Public Service overall by consumers. The top three words used by businesses are ‘helpful’, ‘friendly’ and ‘respectful’

Key Points

- Association of the ‘NSW Public Service’ overall brand with positive descriptors has increased for both consumers and businesses
- Association of the brand with negative descriptors has declined across most descriptors except for ‘Outdated in digital service’ for both consumers and businesses and ‘inflexible’ for businesses

Figure 4.9: Distribution of descriptors across 2019-2020 and average satisfaction for 2020
 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?”



Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



5. Feedback





The ease of making complaints has improved for both consumers and businesses with less than 1 in 4 consumers and businesses finding it difficult to make a complaint in 2020

Key Points

- The proportion of consumers and businesses who provided feedback has remained relatively stable in 2020 compared to 2019
- Of the feedback provided, the proportion of suggestions has increased significantly for consumers from 29% in 2019 to 38% in 2020
- Of the feedback provided, the proportion of complaints has decreased significantly in 2020 compared to 2019 for both consumers and businesses
- The proportion of businesses who found it easy to make a complaint has increased significantly from 45% in 2019 to 63% in 2020

Figure 5.1: Percentage of respondents who provided feedback

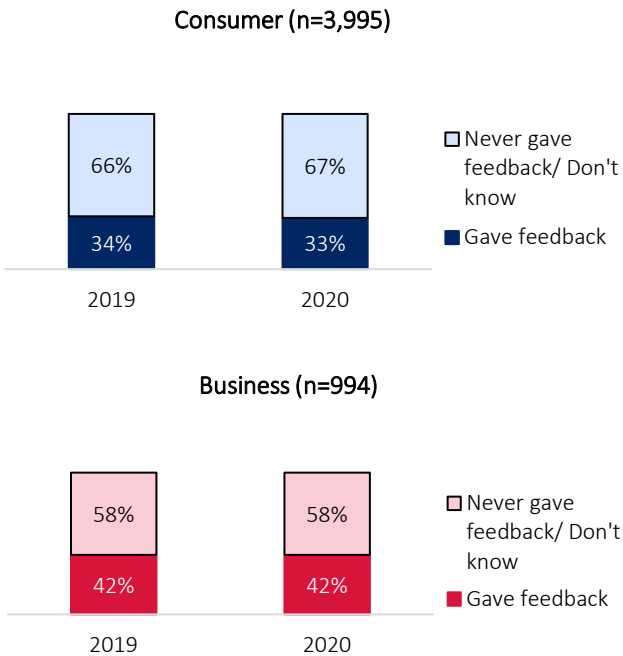


Figure 5.2: Nature of feedback

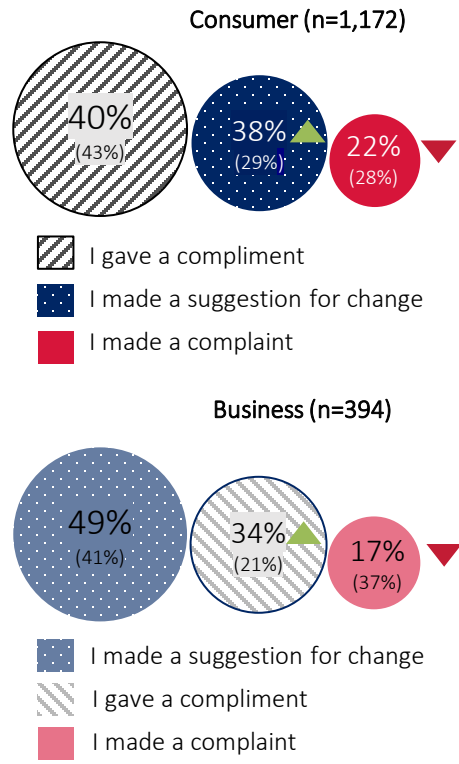
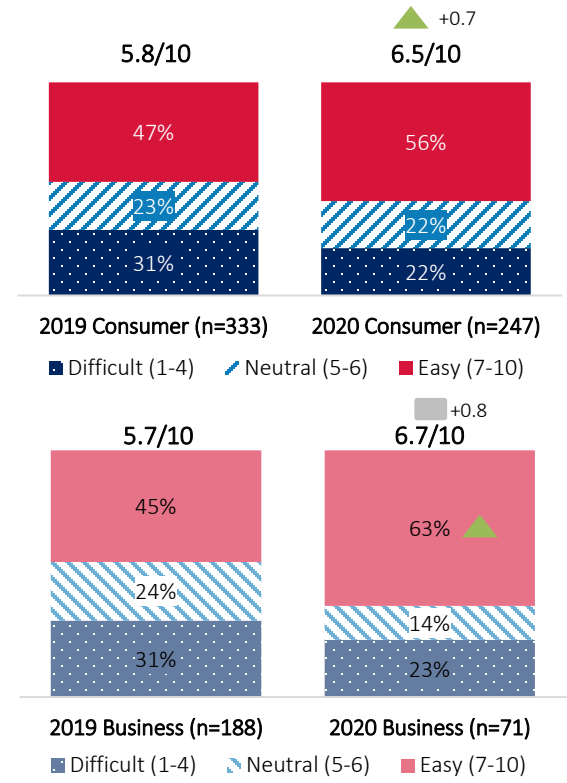


Figure 5.3: Level of ease to make a complaint



*Numbers in brackets are from 2019

The proportion of complaints being handled well has increased for both consumers and businesses in 2020 compared to 2019

Key Points

- There has been a significant decline in the proportion of consumer complaints being handled poorly (from 55% in 2019 to 41% in 2020)
- Handling of business complaints has improved with the proportion of well handled complaints (41%) exceeding poorly handled complaints (39%)
- Across consumers and businesses, those who complain have lower overall satisfaction, expectation and trust scores. Good handling of complaints corresponds to higher overall satisfaction, expectation and trust compared to when complaints are handled poorly

Figure 5.4: Complaint handling experience

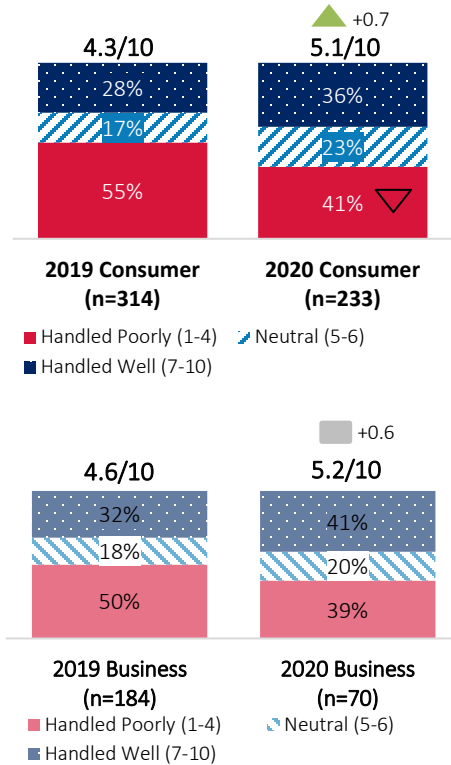
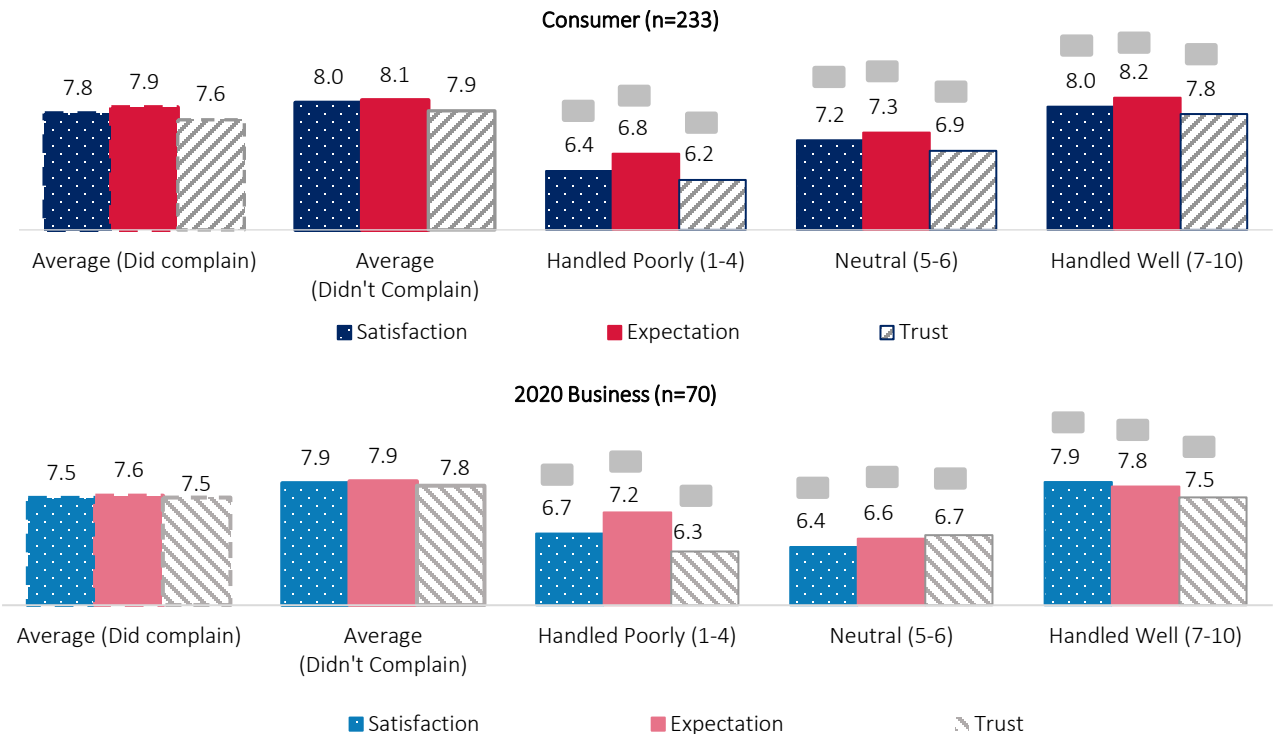


Figure 5.5: Complaint handling experience by outcome measures (out of 10)



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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



For both consumers and businesses, suggestions more commonly relate to processes, and compliments more commonly relate to employee interactions

Key Points

- Across consumers and businesses, over 40% of the compliments related to employee interactions
- 36% of suggestions provided by consumers and 41% of suggestions provided by businesses related to processes
- 35% of complaints made by consumers related to processes and 36% of complaints made by businesses related to employees
- Consumers conveyed compliments mostly 'in person, face to face or via the phone' (39%) while suggestions and complaints were mostly made via email (40% and 45% respectively)
- Businesses used 'in person, face to face or phone' (30%), email (32%) and service's website (30%) in equal measure to give compliments; suggestions and complaints were made mostly via email (52% and 44% respectively)

Figure 5.6: Nature of feedback by feedback type

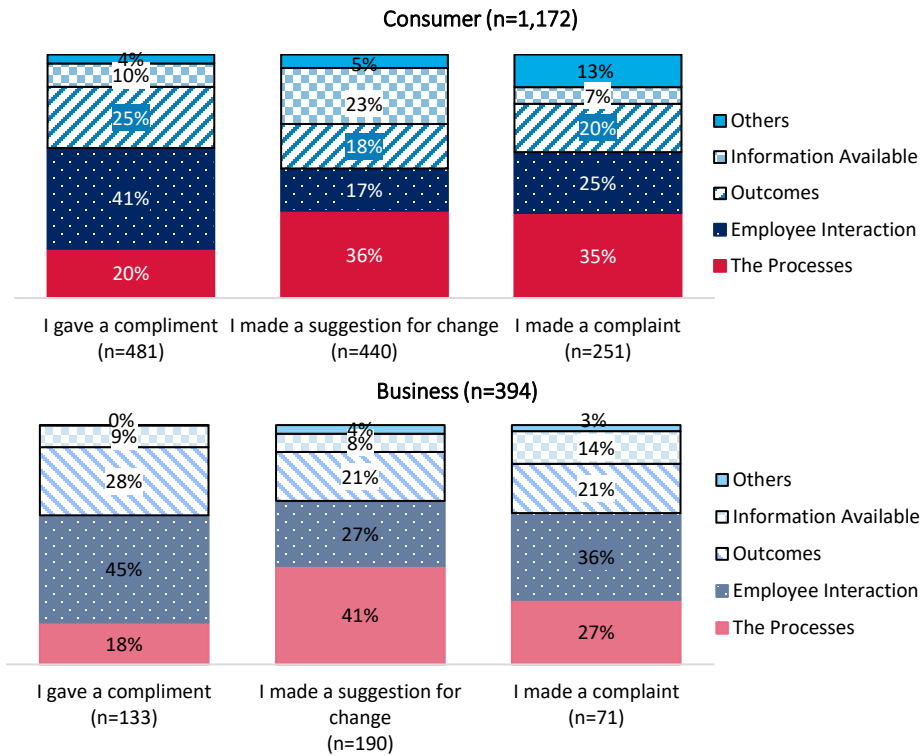
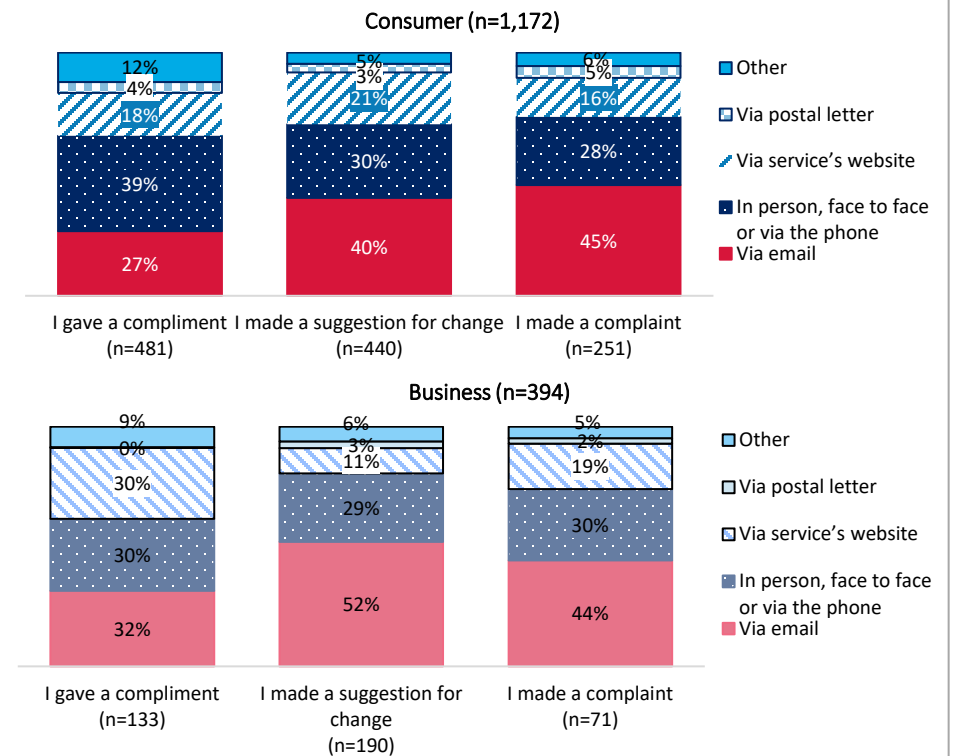


Figure 5.7: Nature of feedback by method used



For both consumers and businesses, NSW received the lowest proportion of complaints in comparison to other jurisdictions

Consumers:

- NSW has the highest proportion of consumers giving feedback (33%) and VIC has the lowest (29%)
- 40% of all consumer feedback in NSW is compliments compared to 40% in VIC, 42% in QLD and 39% in SA
- NSW has the highest proportion of suggestions for change (38%) compared to other jurisdictions
- NSW has the lowest proportion of complaints (22%) compared to other jurisdictions

Business:

- NSW and QLD have the highest proportion of businesses giving feedback (42%); SA has the lowest (36%)
- 34% of all feedback given by businesses in NSW are compliments compared to 28% in VIC, 37% in QLD and 34% in SA
- NSW and VIC have the highest proportion of suggestions for change (49% each) compared to other jurisdictions
- NSW has the lowest proportion of complaints (17%) compared to other jurisdictions

Figure 5.8: Percentage of respondents who provided feedback by jurisdiction

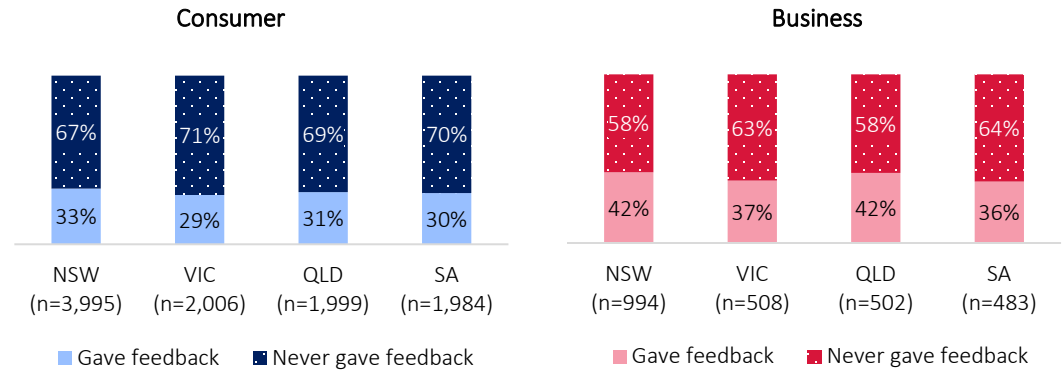
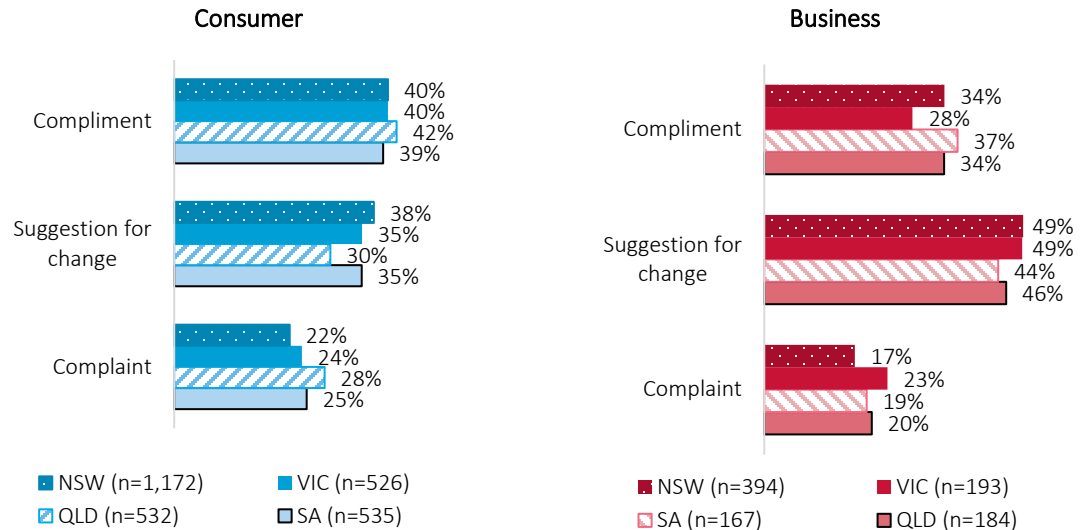


Figure 5.9: Nature of feedback by jurisdictions



Appendices

1. Background and methodological approach

2. Further technical information



Customer
Service



Appendix 1: Background and methodological approach



Background

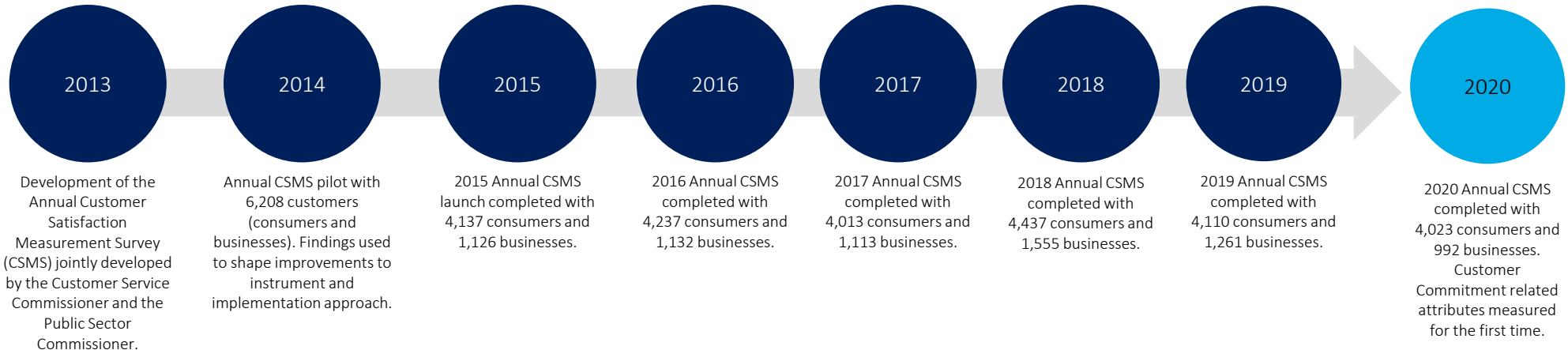
The Annual Customer Satisfaction Measurement Survey (Annual CSMS) has been developed to support a continued focus on improving satisfaction with government services.

The Annual CSMS 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 was implemented annually (2015-2019).

The results of the Annual CSMS are 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 and 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 NSW Government services are performing overall from the customers’ perspective, and with respect to other jurisdictions (including changes in results from 2019 to 2020)
- 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 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

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 2019 to 2020 or year on year trends as specified in each legend.



Structure of the 2020 Annual Customer Satisfaction Measurement Survey

Survey Sections	Sample Questions*
Profile and use of government services	<ul style="list-style-type: none"> • Age, gender, region where you live/work • Business location, type, size, position in business, industry type • Which government services have you ever had direct dealings with in the last 12 months? • Nature and frequency of direct dealings for individual services
Usage and satisfaction with digital services	<ul style="list-style-type: none"> • Which contact methods were used when carrying out direct dealings with services? • 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? • Thinking about your overall experience, to what extent would you agree or disagree with each of the following Customer Commitment statements?***
Perceptions of public service 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?
Impact of recent events**	<ul style="list-style-type: none"> • What has been the impact of the following recent events on your personal circumstances/ on the business you own or represent? (bushfires, droughts, COVID-19)

*Questions of low relevance have been removed | ** New questions in 2020

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

Research Scope and Approach

The Annual CSMS captures customer feedback on twenty-two different NSW Government services which have been aggregated to provide a view of Whole of Government performance.

‘Customers’ in this survey are consumers and businesses that have had direct dealings with services provided by the NSW Government in the last 12 months.

This 12 month timeframe ensures experiences were sufficiently recent for customers to provide accurate feedback and is in line with yearly implementation of the survey.

The survey captures customer feedback on twenty two different NSW Government services, described in the customer’s language. Feedback received from customers about each of the individual services have been aggregated to provide a view of the performance of NSW Government services overall.

Each respondent to the survey provided feedback about 1 or 2 services. As a result, the total number of responses received across services is greater than the total number of customers who completed the survey. Throughout the report, sample sizes have been reported based on the total number of responses (rather than the total number of respondents).

The results for services that were most commonly interacted with (e.g. Public Transport) in the last 12 months were given a greater weighting to Whole of Government scores. This is to allow for the Whole of Government scores to reflect the services in a correct proportion, with higher weighting given to those services which consumers interact with more frequently.

In scope services

Planning , Industry & Environment

- Environment and wildlife protection
- Water Supply
- Agriculture advice and funding services
- Business Advisory Services

Transport

- Public Transport
- Car and Boat Registration
- Major Roads

Customer Service

- Consumer Affairs (Fair Trading)
- Documentation Services

Premier and Cabinet

- State owned art galleries and museums

Justice

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

Health

- Public Hospitals
- Ambulance Services

Family & Community Services

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

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 and South Australia 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.

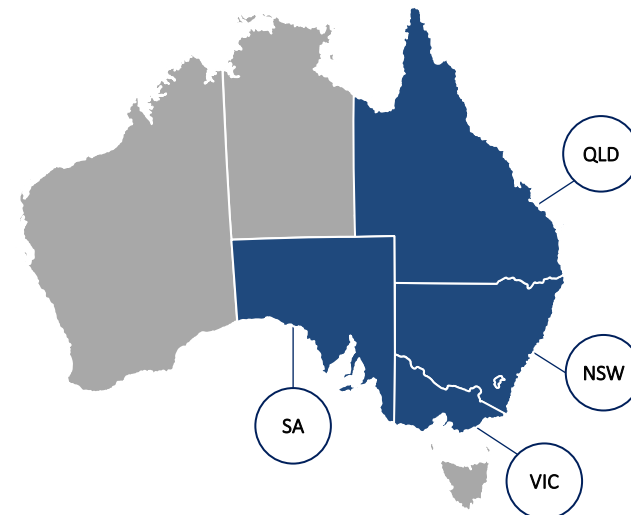
All surveys were completed over a consistent time period from **21 July 2020 – 17 Aug 2020** and results are therefore reflective of experiences with services across jurisdictions over the 12 months prior, from July 2019 – July 2020. The 2019 surveys were completed from **20 June 2019 to 10 July 2019** and results are 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:

2020 Survey Sample Size

Jurisdictions	Consumer (n=)	Business (n=)	Total (n=)
New South Wales	4023	992	5,015
Queensland	2,011	504	2,515
Victoria	2,024	505	2,529
South Australia	1,995	484	2,479



NSW Customer Satisfaction Index

The Customer Satisfaction Index has increased significantly for both consumers and businesses in 2020.

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 2020 is 82.0 out of 100 for consumers (an increase of 1.4 since 2019) and 80.7 out of 100 for businesses (an increase of 3.1 since 2019). Refer to Figure 1.1.

The index has been designed based on the American Customer Satisfaction Index (ACSI) using a proven approach to customer experience measurement.

The Customer Satisfaction Index is calculated as an average across the following three components (refer to Figure 1.2 for further detail):

1. Overall satisfaction with a NSW Government service
2. A calibrated gap between satisfaction and expectation for a NSW Government service which incorporates information about whether expectations have been met, with sensitivity when performance is below expectations but not when expectations are exceed
3. How the current NSW Government service compares to a customer’s perceived ideal service

An individual score across these three components is calculated for each respondent and rebalanced to be on a scale of 0 to 100 in line with the ACSI methodology. Each individual score is then averaged across the total population to provide a Whole of Government measure.

Figure 1.1: Customer satisfaction index score for 2020

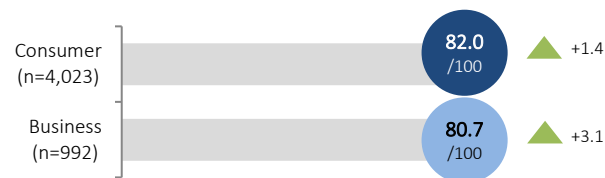
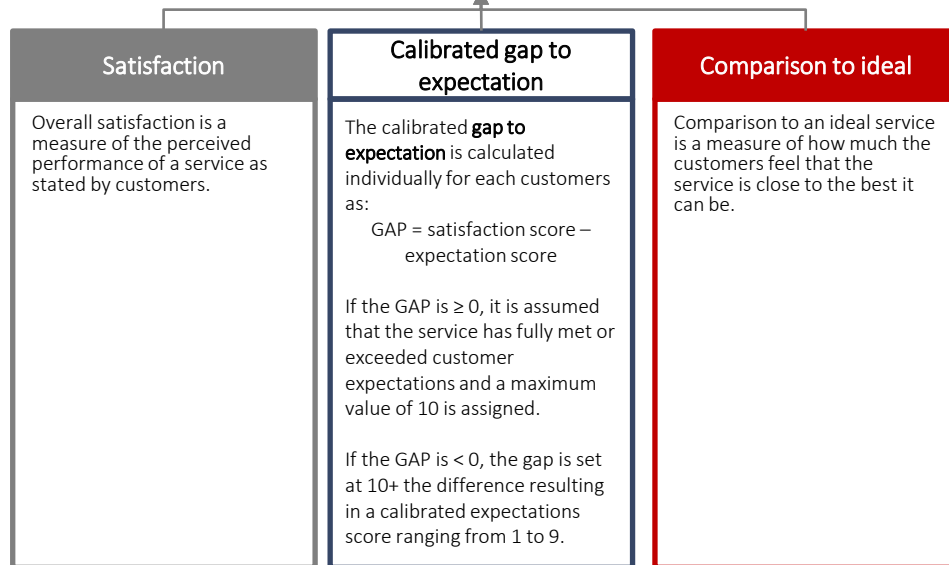


Figure 1.2: Customer satisfaction index methodology

The **Customer Satisfaction Index** is measured as the average of the following scores recalibrated to be on a scale of 0-100 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)

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

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):

- 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=30 for both consumers and business surveys

Programmed and tested survey

- A single dynamic survey was programmed for NSW, VIC, QLD and SA for each of business and consumer to optimise responses
- Logic was built into the survey which optimally allocated respondents to those services with the least levels of interactions in previous years
- Once the survey was programmed, rigorous testing was undertaken to ensure there were no breaks in the survey logic

Undertook a survey pilot

A survey pilot was undertaken over a 24 hour period and targeted to 5% of the total sample to:

- Ensure there are no errors in the survey programming
- Ensure we are yielding quality responses by checking:
 - 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

- Daily monitoring of surveys while in field to check progress and inform targeted action to ensure sufficient representative sample was achieved
- 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 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:

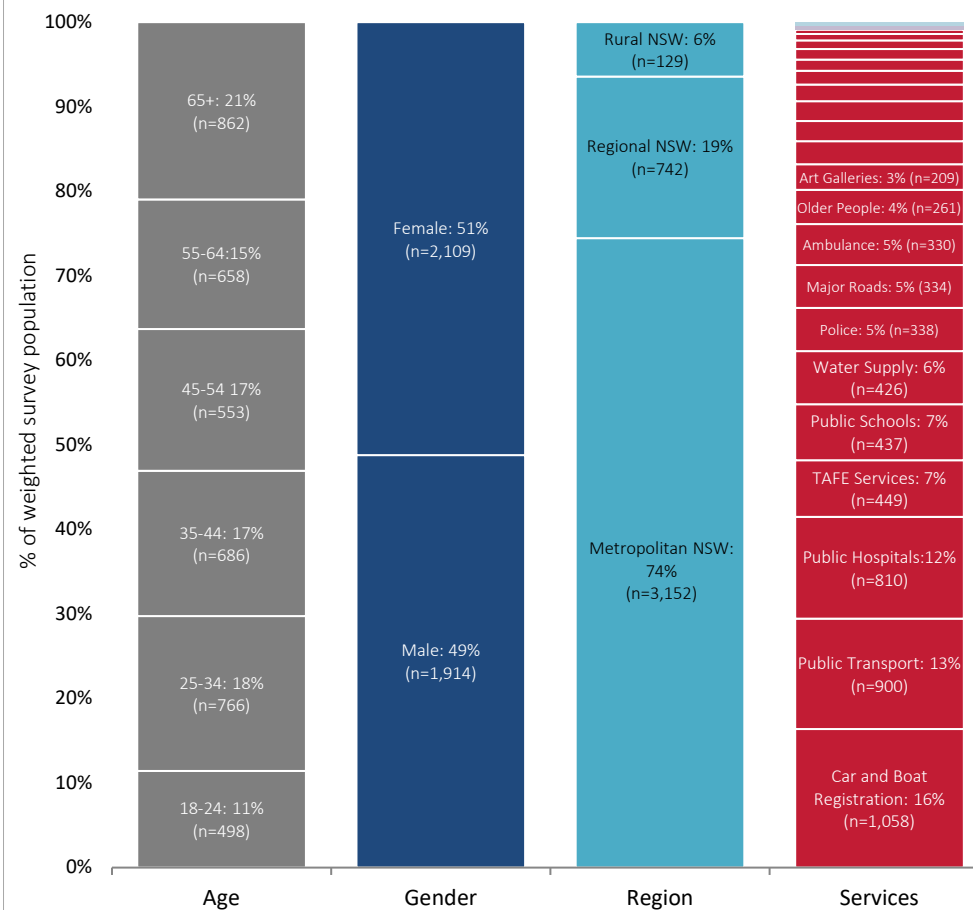
- Age and gender are based on the population of NSW residents (from ABS)
- Region based on the population of NSW residents who live in metropolitan NSW, Regional NSW and Rural NSW (from ABS)
- Aggregate scores across services have also been weighted according to the proportion of respondents who have 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 2.1: NSW consumer survey sample composition and weighting (n=4,023)



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:

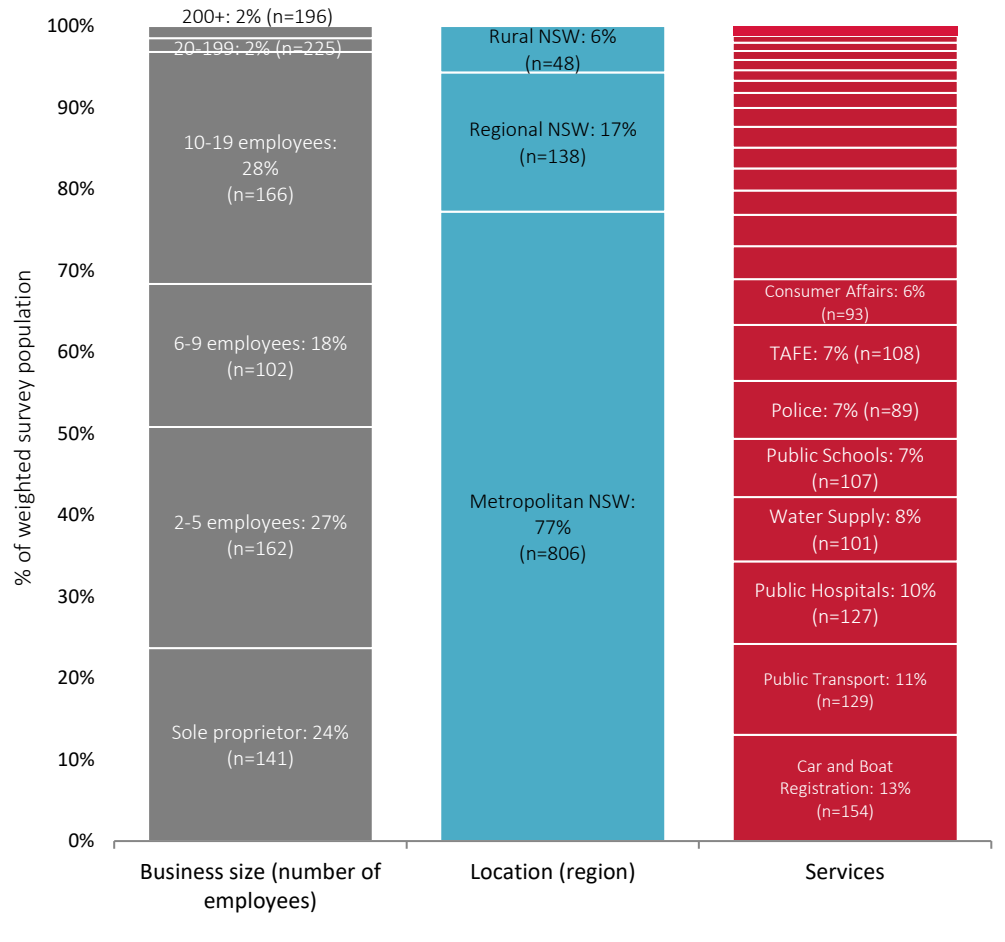
- Business size based on number of employees (from ABS)
- Location of business based on the population of NSW businesses which are based in metropolitan NSW, Regional NSW and Rural NSW (from ABS)
- Aggregate scores across services have also been weighted according to the proportion of respondents who 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 2.2: NSW business survey sample composition and weighting (n=992)



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:

- Linear 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 Linear Regression coefficients

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

Drivers of customer satisfaction - 2020

Honesty and integrity of employees <ul style="list-style-type: none"> Engender confidence in their knowledge Provide good value services Are honest Deliver high safety standards 	Efficiency and effectiveness of employees <ul style="list-style-type: none"> Get things done as quickly as possible Are consistent Are reliable Are held accountable 	Communication of Employees <ul style="list-style-type: none"> Explain intended actions clearly Communicate well 	Fairness and empathy <ul style="list-style-type: none"> See things from my perspective Provide services without bias
Ease of Processes <ul style="list-style-type: none"> Processes are easy to understand Service feels seamless even if I have to use multiple contact methods. 	Speed of Processes <ul style="list-style-type: none"> Are designed to reduce wait times I can get to the right person the first time 	Employee autonomy <ul style="list-style-type: none"> Employees are empowered to make decisions 	
Privacy <ul style="list-style-type: none"> Safeguard privacy and confidentiality 	Transparency <ul style="list-style-type: none"> Encourage public participation in decision making Demonstrate openness and transparency in decision making 	Access to information and online services <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 	

Step 2

	Driver	Relative importance ²	
Employee attributes	Efficiency and effectiveness	High	Primary outcome measure Customer satisfaction
	Honesty and integrity	High	
	Fairness and empathy	Moderate	
	Communication	High	
Goals	Access to information and online services	Moderate	
	Transparency	Low	
	Privacy	Moderate	
	Ease	Moderate	
Processes	Speed	Low	
	Employee autonomy	Low	



Ease and Speed of processes have emerged as new drivers of consumer satisfaction in 2020

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 to information and online services
<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

Drivers of customer satisfaction - 2020

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

Ease of Processes	Speed of Processes	Employee autonomy
<ul style="list-style-type: none"> Processes are easy to understand Service feels seamless even if I have to use multiple contact methods. 	<ul style="list-style-type: none"> Are designed to reduce wait times 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 to information and online services
<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

Note given the compositions of the employee and process drivers have changed compared to 2020, no direct comparison can be made to the relative change in performance for the drivers year-on-year

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020



For consumers, there are high priority drivers across employee, goals and processes

Overall drivers of satisfaction: Statistical analysis of the drivers of overall satisfaction¹ with NSW Government services reveals that ‘Honesty and Integrity’ of employees, ‘Effectiveness and efficiency’ of employees and employee ‘Communication’ have a high impact on driving consumer satisfaction

Employee Attributes:

- High Importance: Efficiency and effectiveness, Honesty and integrity and Communication
- Moderate Importance: Fairness and empathy

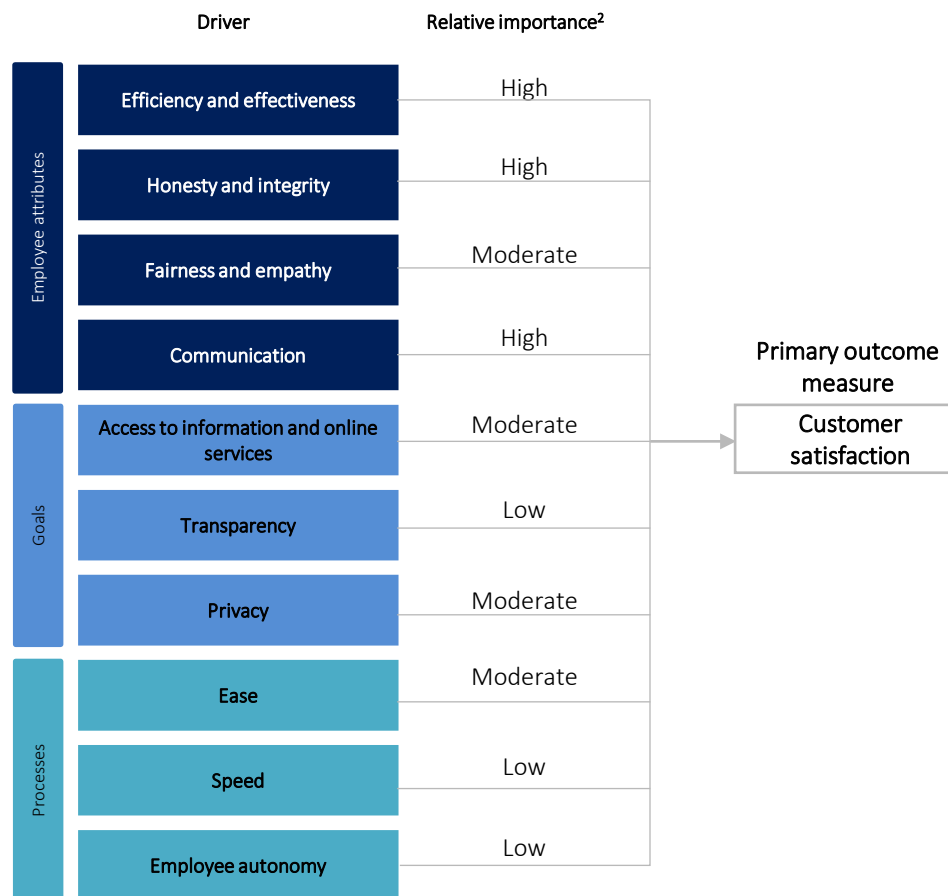
Goals Attributes:

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

Process Attributes:

- Moderate Importance: Ease
- Low Importance: Speed of processes and employee autonomy

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



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

Drivers of satisfaction for businesses have expanded with new drivers emerging within employee and process attributes

Drivers of customer satisfaction - 2019

Honesty and integrity of employees <ul style="list-style-type: none"> • Are honest • Provide good value services • Are reliable • Deliver high safety standards 	Efficiency and effectiveness of employees <ul style="list-style-type: none"> • Are consistent • Engender confidence in their knowledge • Communicate well 	Empathy and communication of employees <ul style="list-style-type: none"> • See things from my perspective • Are held accountable • Explain intended actions clearly • Get things done as quickly as possible 	Fairness <ul style="list-style-type: none"> • Provide services without bias
Simplicity and efficiency of processes <ul style="list-style-type: none"> • Are designed to reduce wait times • Processes are easy to understand 		Responsiveness <ul style="list-style-type: none"> • I can get to the right person the first time • Employees are empowered to make decisions • Service feels seamless even if I have to use multiple contact methods (e.g. online, phone, email) 	
Privacy <ul style="list-style-type: none"> • Safeguard privacy and confidentiality 	Transparency <ul style="list-style-type: none"> • Encourage public participation in decision making • Demonstrate openness and transparency in decision making 	Access to information and online services <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 	

Drivers of customer satisfaction - 2020

Honesty and integrity of employees <ul style="list-style-type: none"> • Deliver high safety standards • Are reliable • Are honest • Engender confidence in their knowledge • Provide good value services 	Speed of service of employees <ul style="list-style-type: none"> • Get things done as quickly as possible 	Fairness and Empathy <ul style="list-style-type: none"> • See things from my perspective • Provide services without bias 	Communication and Consistency <ul style="list-style-type: none"> • Explain intended actions clearly • Are consistent • Communicate well 	Accountability <ul style="list-style-type: none"> • Are held accountable
Ease of Access <ul style="list-style-type: none"> • Service feels seamless even if I have to use multiple contact methods (e.g. online, phone, email) • Processes are easy to understand • I can get to the right person the first time 		Speed of Processes <ul style="list-style-type: none"> • Are designed to reduce wait times 	Employee autonomy <ul style="list-style-type: none"> • Employees are empowered to make decisions 	
Privacy <ul style="list-style-type: none"> • Safeguard privacy and confidentiality 	Transparency <ul style="list-style-type: none"> • Encourage public participation in decision making • Demonstrate openness and transparency in decision making 	Access to information and online services <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 		

Note given the compositions of the employee and process drivers have changed compared to 2020, no direct comparison can be made to the relative change in performance for the drivers year-on-year

Results are subject to rounding

Source: NSW Customer Experience Unit, (DCS), Customer Satisfaction Measurement Survey 2020

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 ‘Honesty and integrity’ of employees, ‘Speed of service’ of employees and ‘Accountability’ of employees

Employee Attributes:

- High Importance: Honest and integrity, Speed of service and Accountability
- Moderate Importance: Fairness and Empathy and Communication and consistency

Goals Attributes:

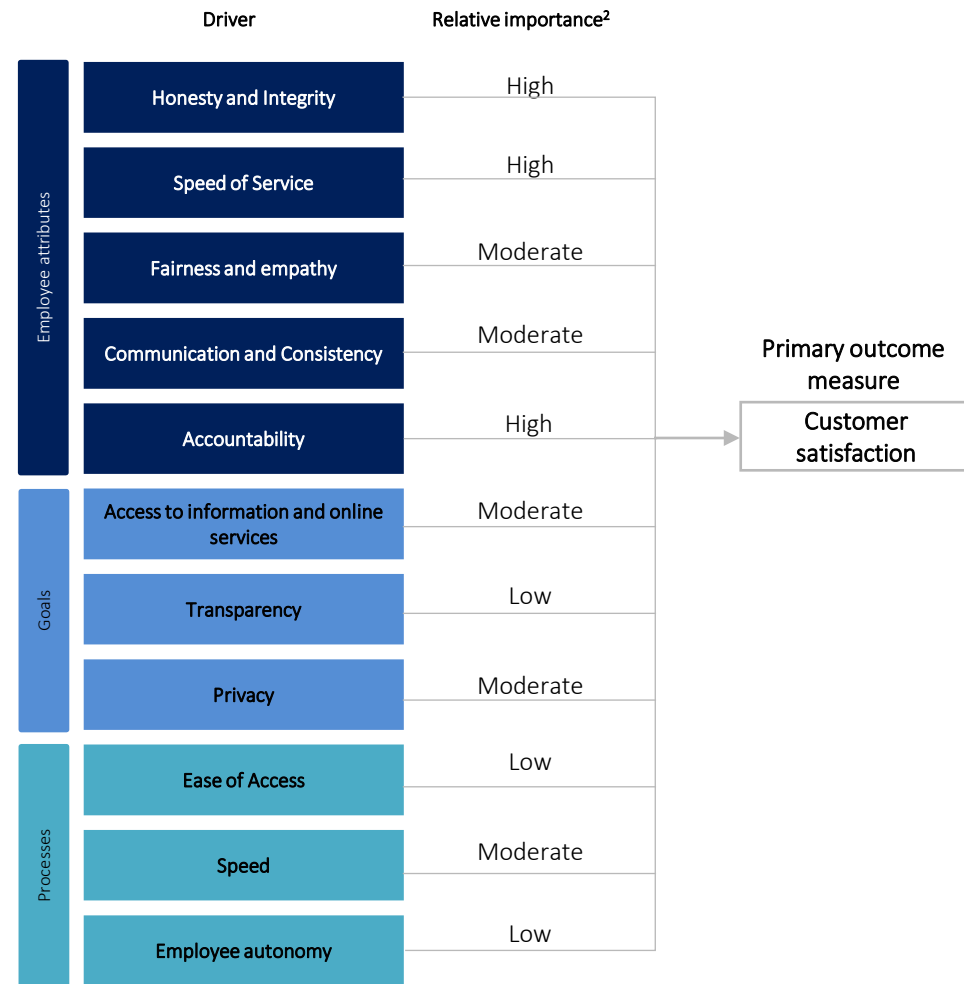
- Moderate Importance: Access to information and online services and Privacy
- Low Importance: Transparency

Process Attributes:

- Moderate Importance: Speed of processes
- Low Importance: Ease of access and employee autonomy

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 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.

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



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

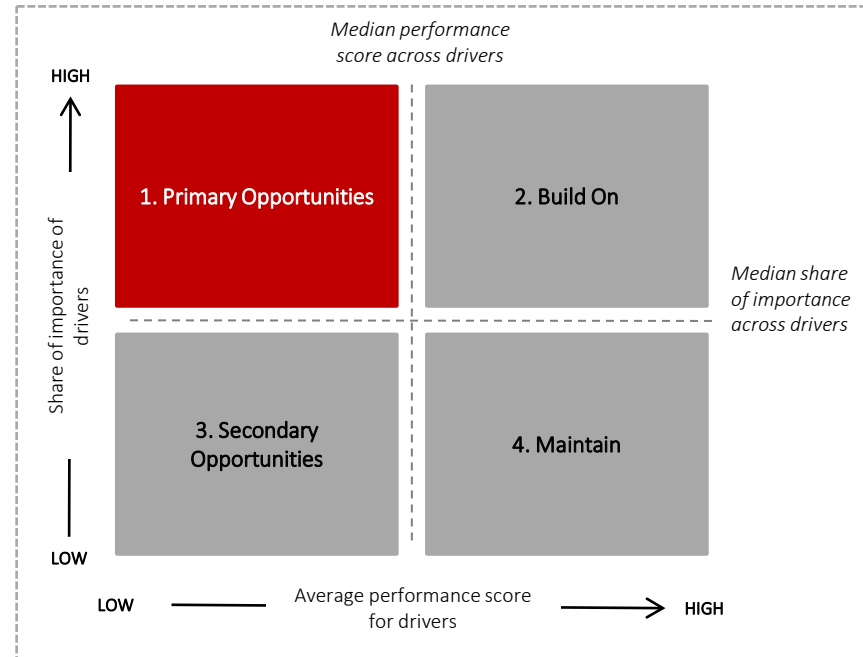


Identification of primary opportunities

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 median satisfaction score
2. Continue to deliver above average performance across the drivers in the **'Build On'** quadrant which are of greater importance to customers and currently have higher than median 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