



Business First | 2019

Presentation to the Joint Councils

Presented by: Marina Gilson, Director, Ipsos
September 25, 2019

Agenda

Study Background

Service Reputation

Service Experience

Priorities for Service Improvement

Increasing Online Uptake

Q&A

STUDY BACKGROUND

Objectives

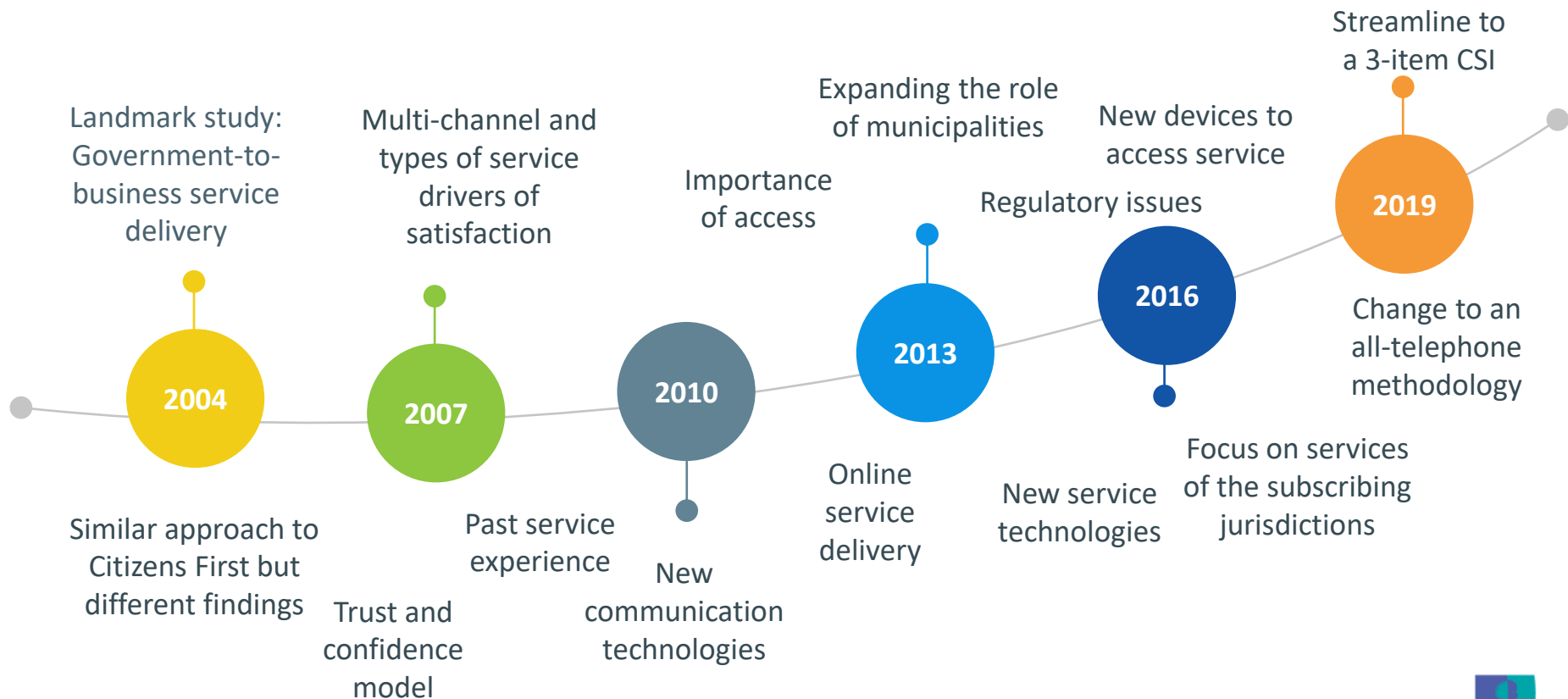
Business First (formerly Taking Care of Business) is a series of studies which have been conducted every 2 to 3 years under the direction of the Institute for Citizen-Centred Service (ICCS).

These surveys explore various dimensions of the evolving service environment, tracking perceptions of service quality and performance for a wide range of services offered by federal, provincial/territorial, regional and municipal governments. Key objectives are to measure:



- The service reputation of various levels of government in Canada as perceived by business users of government services;
- Satisfaction with government services provided to businesses;
- The drivers of satisfaction;
- Usage and preference of delivery channels and motivations for using online services; and
- Attitudes toward regulatory burden and its reduction.

Evolution of Business First



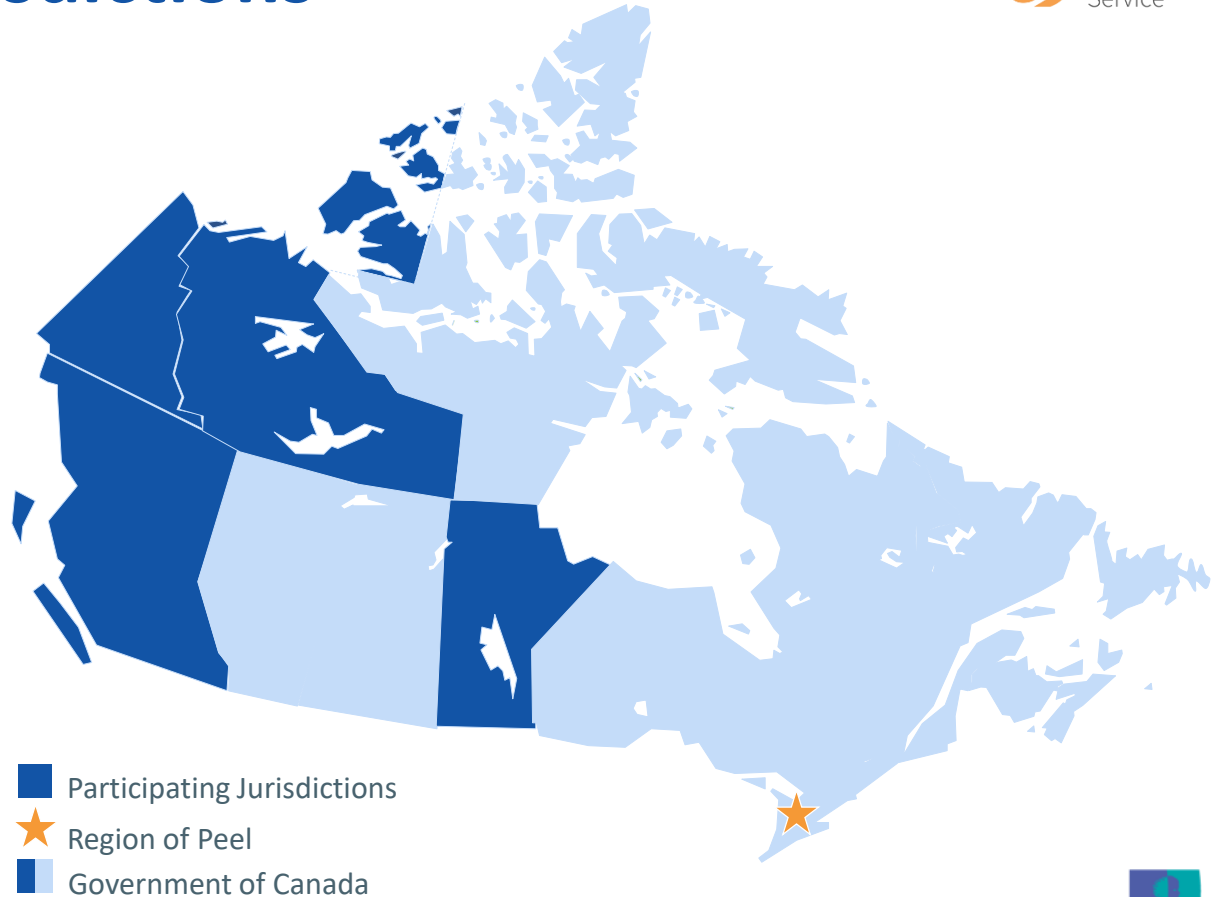
Research Approach

- 2,357 interviews with business respondents across Canada
- Mode: Telephone interviews
- Field Period: December 2018 to February 2019
- Weighting: Adjusted to the universe of businesses by jurisdiction and size of business.

Participating Jurisdictions

Six participating government entities:

- Province of British Columbia
- Government of Canada
- Province of Manitoba
- Northwest Territories
- Region of Peel
- Yukon

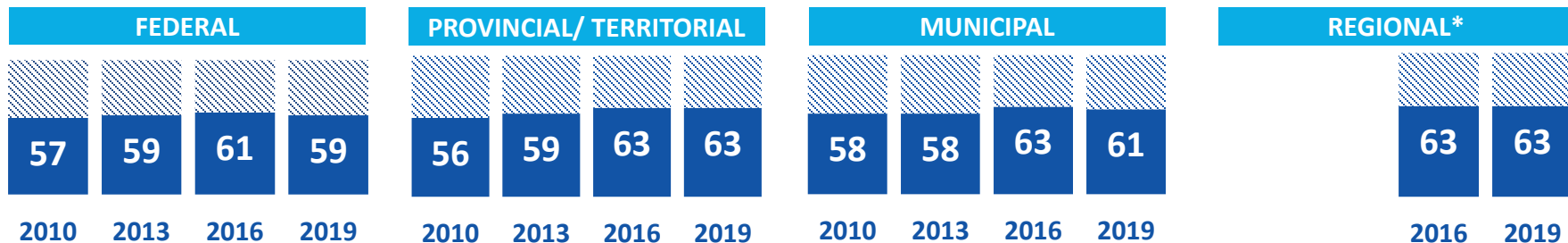


SERVICE REPUTATION

Perceptions of Government Services Have Levelled Off

SERVICE REPUTATION

(0 to 100 Scores)



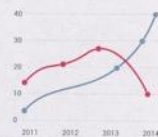
Key Takeaway:

There is significant potential for improvement in service reputation across all levels of government.

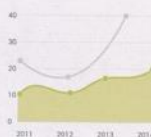
* Service reputation scores for regional government were not reported at the national levels in previous waves of this study.

Morris Charts

Line Chart



Area Chart



Bar Chart



Donut Chart



Sparkline Charts

Line Chart



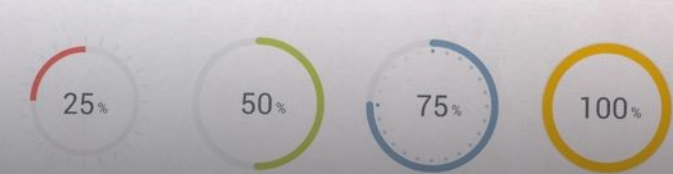
Bar Chart



Pie Chart



Easy Pie Charts

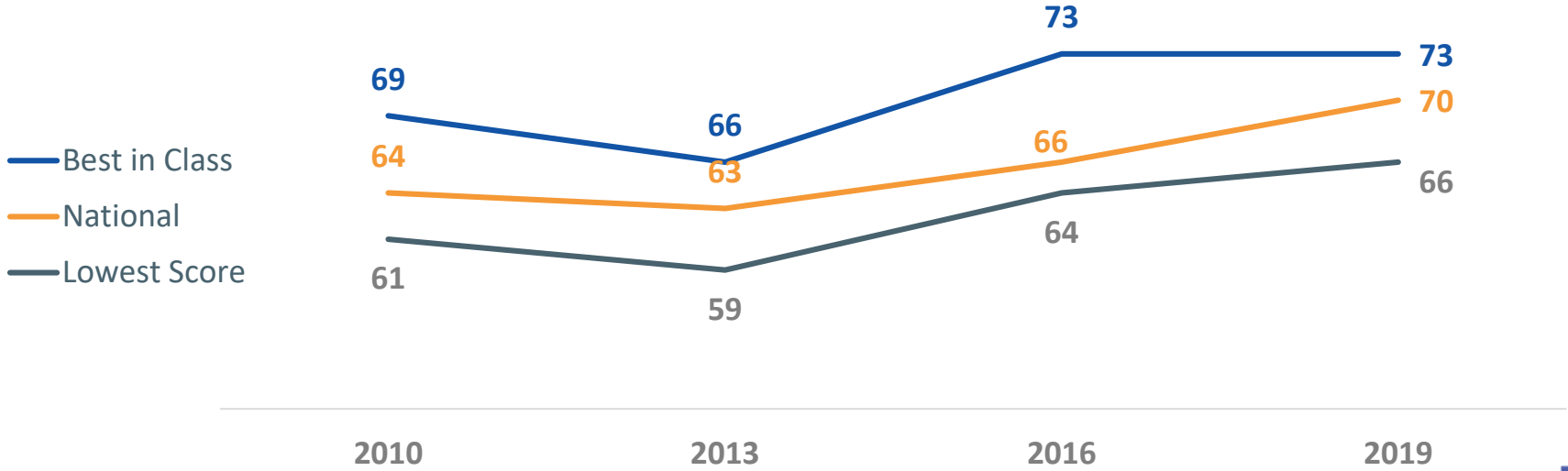


SERVICE EXPERIENCE

Satisfaction Trends

There have been modest increases in business client’s satisfaction with government services over time. Currently, the national score is 70. There is some variation in experience across the jurisdictions, ranging from the highest score of 73 to the lowest score of 66.

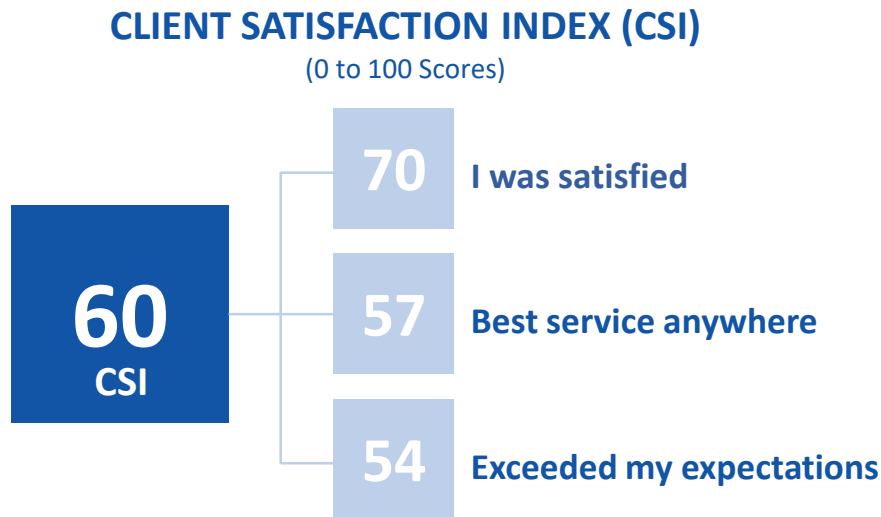
OVERALL SATISFACTION WITH RECENT SERVICE EXPERIENCE
(0 to 100 Scores)



Government's Performance on the CSI is Positive, but not Outstanding

The Client Satisfaction Index (CSI) is a composite score that takes into account satisfaction, a comparative evaluation and performance against expectations.

Business clients of all levels of government in Canada provide an average CSI score of 60 for a recent experience with a government service.

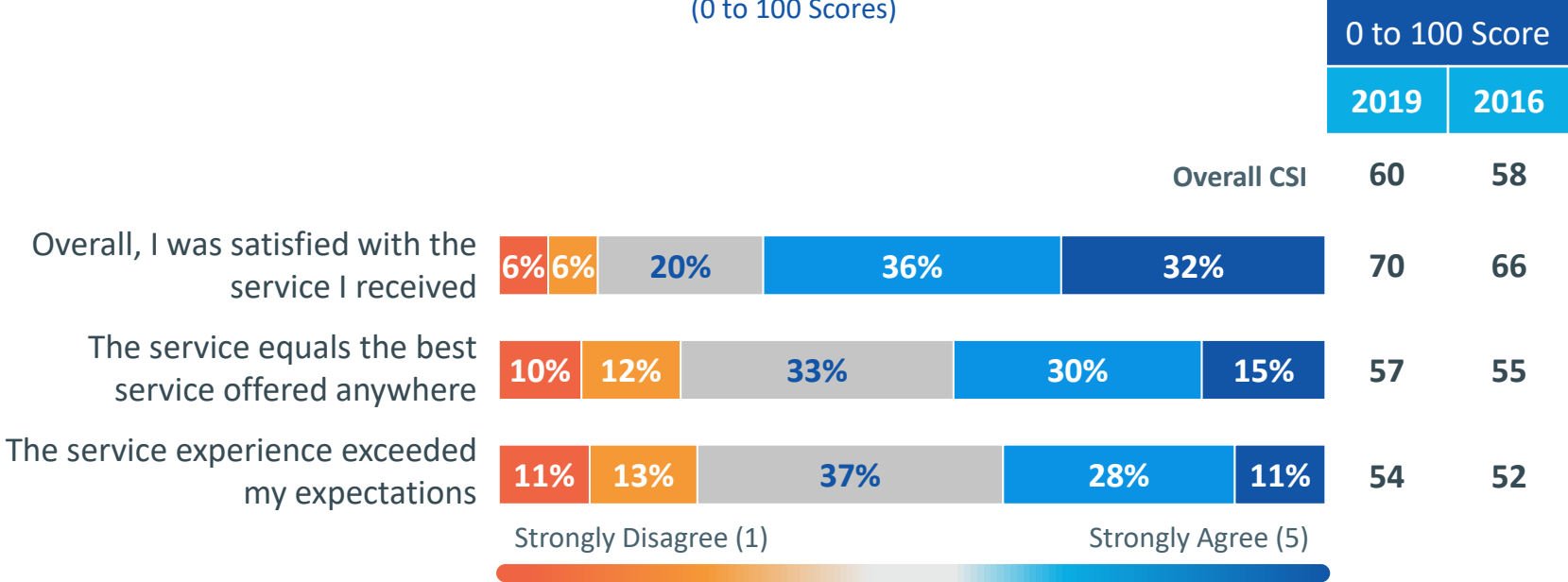


Businesses are only moderately satisfied with government services. Governments in Canada should make a greater effort to provide a more positive service experience for their business clients.

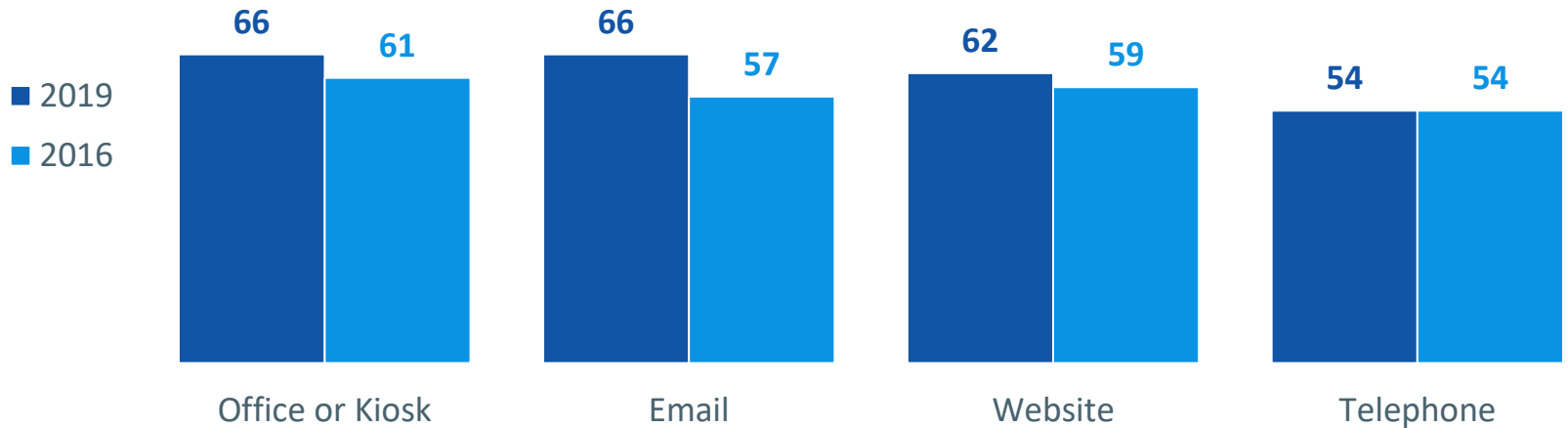
Client Satisfaction Index (CSI)

Business respondents provide a CSI of 60 on the 0 to 100 scale for a recent service experience. This is a slight improvement over the score of 58 attained in 2016.

CLIENT SATISFACTION INDEX (CSI*) (0 to 100 Scores)



CLIENT SATISFACTION INDEX (CSI*) BY CHANNEL
(0 to 100 Scores)

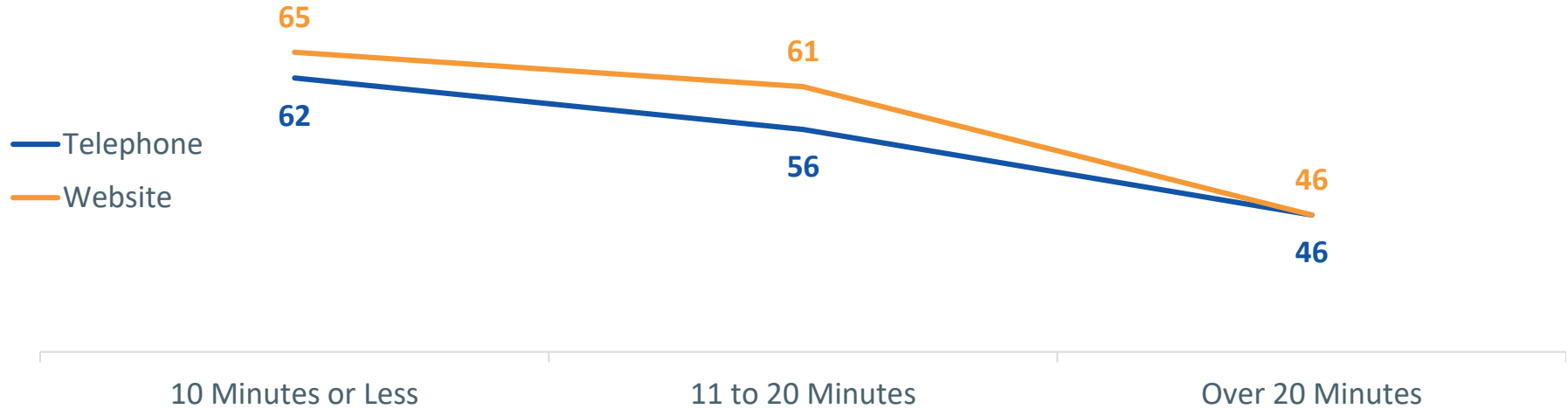


** The Client Satisfaction Index is an average 0 to 100 score of the ratings of three attributes: overall satisfaction, the service equaling the best anywhere and exceeding expectations.*

CSI by Time Spent

CLIENT SATISFACTION INDEX (CSI)* BY TIME SPENT FINDING INFORMATION OR STARTING SERVICE TRANSACTION

(0 to 100 Scores)



* The Client Satisfaction Index is an average 0 to 100 score of the ratings of three attributes: overall satisfaction, the service equalling the best anywhere and exceeding expectations.



PRIORITIES FOR SERVICE IMPROVEMENT

Priorities for Service Improvement

Key driver analysis reveals service attributes with high importance and lower levels of client satisfaction. Changes that improve perceptions of business customers on these key attributes of the service experience will result in higher future CSI scores.

The key drivers for business clients of government are as follows. Ease of access is also a key driver for telephone service provision.



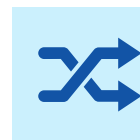
Extra Mile



**Future Issues/
Issue Resolution**



Timeliness



Navigation (Web)

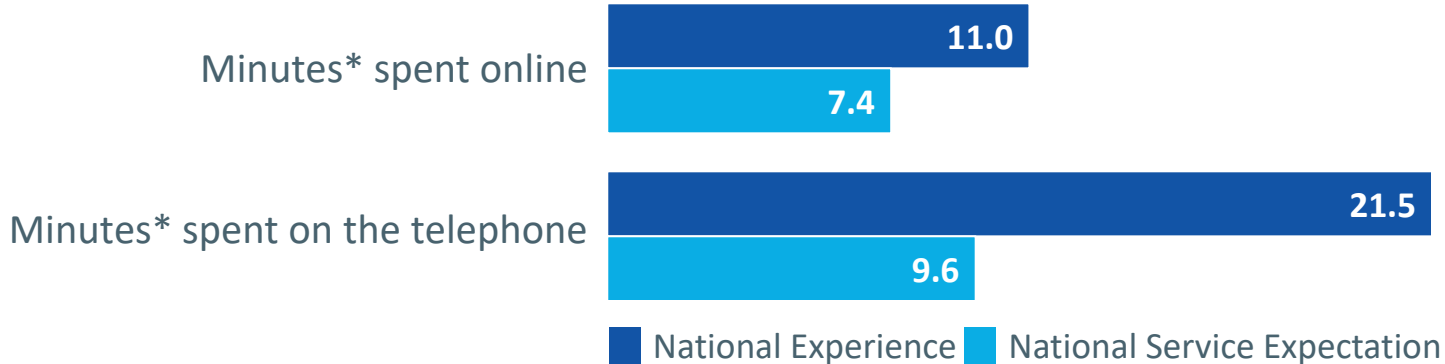
Key Takeaways:

- Particular emphasis should be placed on future issues and issue resolution, as these have the lowest scores.
- Governments should strive to improve service so that fewer customers experience issues or problems, and provide options for resolution when they do occur.

Timeliness of Service Expectations are not Being Met

There is a significant gap between the expectations and the experience reported by business users of government services when it comes to the length of time to access services over the telephone or online.

REASONABLE TIME/ TIME SPENT TO FIND INFORMATION OR START TRANSACTION



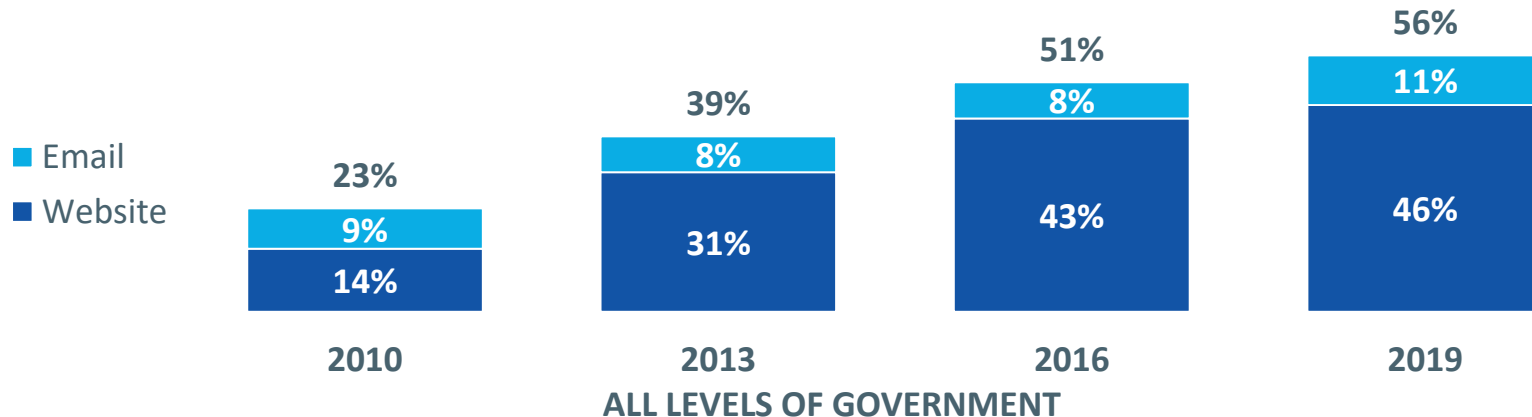
** Responses of over 60 minutes have been identified as outliers and excluded from the mean calculation. Survey respondents were asked how many minutes they spent/ is a reasonable amount of time to spend to get information or start a service transaction.*

INCREASING ONLINE UPTAKE

Digital Usage of Government Services has More Than Doubled since 2010

The proportion of business clients using online channels to access services has more than doubled since 2010, from 23% in 2010 to 56% across all levels of government in Canada.

MAIN CHANNELS USED TO ACCESS GOVERNMENT SERVICES



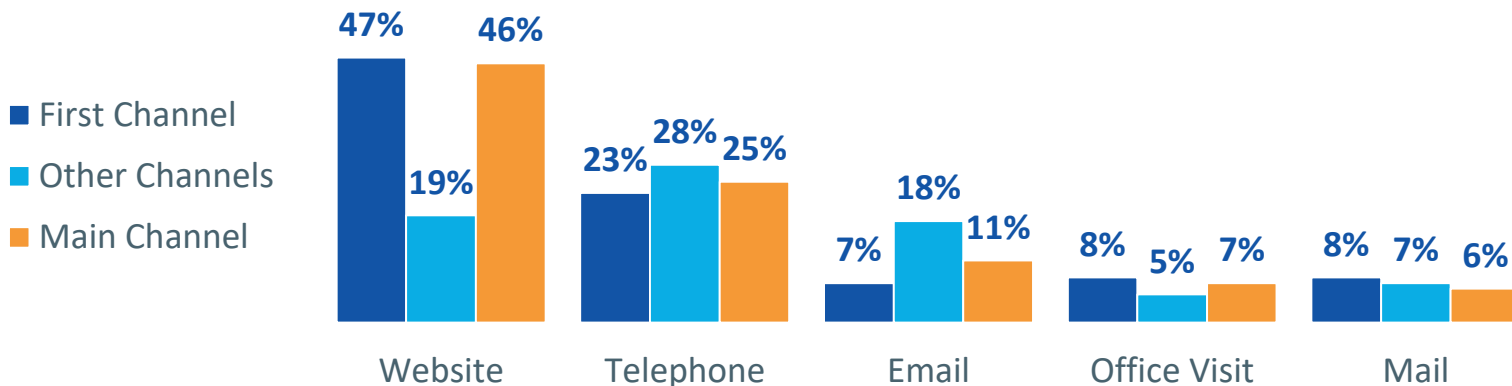
Specific Steps to Increase Online Usage

- Improve the findability of online services, which will in turn reduce the gap between business customers' expectations and time spent online.
- Implement the enhancements to online service provision to which customers respond positively:
 - Assure customers that they will be able to find the service online with a few mouse clicks and complete the service within 5 minutes, and develop websites that deliver on this promise.
 - Focus on service improvements in the areas that are key satisfaction drivers: timeliness and navigation, and issues resolution.
- Implement customer suggestions for the online channel, such as making it easier to navigate and more user friendly, and improving responsiveness to emailed communication.
- Increase focus on preventing and resolving issues and problems that arise during service transactions. Provide multiple means of contact for customers that are experiencing issues with obtaining the service or difficulties online.

Online Channels are Often Used First

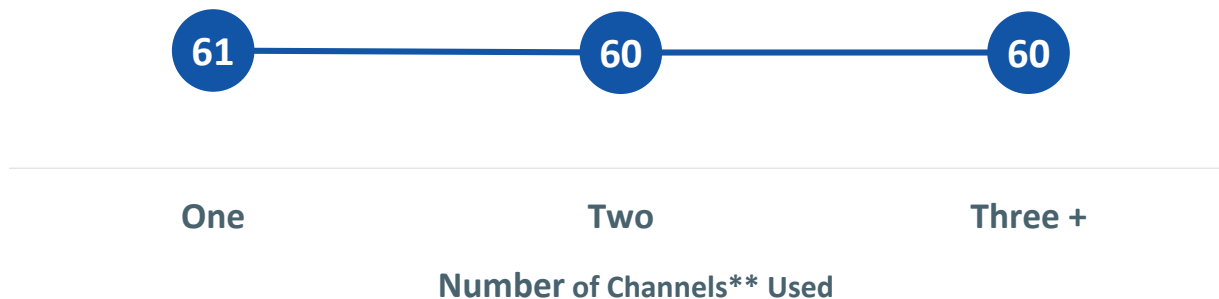
In just under one-half of transactions with all levels of government in Canada, business clients first use a website. Some customers may have hoped to complete the transaction online, but were not able to do so. Others were likely seeking information on accessing services that they ultimately obtain using other channels.

CHANNELS USED TO ACCESS GOVERNMENT SERVICES



Satisfaction is Maintained When Multiple Channels are Used

CLIENT SATISFACTION INDEX (CSI)* For All Levels of Government



Key Takeaway:

Government service providers should support the customer journey across more than one channel where appropriate.

**The Client Satisfaction Index is an average 0 to 100 score of the ratings of three attributes: overall satisfaction, the service equaling the best anywhere and exceeding expectations.*

*** Note: Number of channels is derived from all methods of contact used.*

