Citizens First 8

KEY INSIGHTS AND FINDINGS

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December 10, 2018

Ipsos Public Affairs
Outline

▪ Background and Approach
▪ Key Findings
▪ How Are We Doing?
▪ Priorities for Improvement
▪ Service Expectations
▪ Moving Services Online
▪ Connecting with Clients Online
Objectives for Citizens First 8

Over the past 20 years, the Citizens First series of studies have plumbed key facets of the citizen-government interface, including:

• Citizen satisfaction with services provided to them by governments,

• The drivers of satisfaction,

• Channel usage, preferences and satisfaction,

• Citizens’ expectations in terms of service delivery, and

• Ways to increase uptake of the cost-effective online channel, while continuing to meet the needs of all citizens.
Key Changes for Citizens First 8

- Streamlining the main customer experience measure to a three-item index, and
- Using a Behavioral Science approach to provide new insights on overcoming barriers to adoption of online government services.
Evolution of Citizens First

- **CF1 1998**: Exploding myths and misperceptions
- **CF2 2000**: Channel strategies and the multi-channel experience
- **CF3 2002**: A performance measurement and benchmarking tool
- **CF4 2005**: Elements of the service value chain
- **CF5 2008**: Expectations management
- **CF6 2012**: Building trust and confidence in government
- **CF7 2014**: Service standards for emerging channels
- **CF8 2018**: New service technologies

- **Online service delivery**
- **Behavioural Science**
- **Serving people with disabilities**
- **Expectations management**
- **Satisfaction across channels**
- **Elements of the service value chain**
- **Building trust and confidence in government**
- **Channel strategies and the multi-channel experience**
- **A performance measurement and benchmarking tool**
- **Exploding myths and misperceptions**
- **e-government**
Eleven Participating Jurisdictions

- Alberta
- British Columbia
- Government of Canada
- Manitoba
- Northwest Territories
- Nova Scotia
- Ontario
- Region of Peel
- Prince Edward Island
- City of Toronto
- Yukon
Research Approach

Over **5600** respondents

**Mixed Methodology:**
- Online: 66%
- Mail: 18%
- Telephone: 8%
- Mail-to-online: 7%

Residents across Canada

**Interviewing:**
- **December 2017 to February 2018**

**Margin of error:**
- National Survey: ± 3.0%
- Total Jurisdictional Survey: ± 1.4%
KEY FINDINGS
Key Findings

• Canadian clients of government services are quite satisfied with the service provided.

• Important areas where service improvements would increase satisfaction are:
  • Reducing the frequency of encountering problems during the client journey, and focusing on resolving issues when they do occur,
  • Improving timeliness, particularly for the online channel,
  • Providing timely help, and
  • Improving telephone access, particularly for aspects of the client journey that can not be met online and for customer groups that are not active online.

• Uptake of the online channel to access government services will be increased when:
  • Clients perceive that it will be easy, and they feel knowledgeable and experienced, and
  • They have confidence in the website or app and in online support.
HOW WE ARE DOING?
Service Reputation Has Improved Over the Past 20 Years

*0 to 100 scores are scaled from 0% for Very Poor (1), 25% for 2, 50% for 3, 75% for 4 through 100% for Very Good (5).

Significantly higher/ lower than the previous wave (Stat testing provided between CF5 to CF8 only)
## Service Reputation Scores

**OVERALL PERCEPTIONS OF GOVERNMENT SERVICE**

<table>
<thead>
<tr>
<th>Area</th>
<th>Very Poor</th>
<th>Poor</th>
<th>Satisfactory</th>
<th>Excellent</th>
<th>Very Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal</td>
<td>39%</td>
<td>33%</td>
<td>41%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Regional</td>
<td>31%</td>
<td>37%</td>
<td>37%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Provincial/Terr</td>
<td>7%</td>
<td>14%</td>
<td>36%</td>
<td>34%</td>
<td>10%</td>
</tr>
<tr>
<td>Federal</td>
<td>5%</td>
<td>12%</td>
<td>36%</td>
<td>38%</td>
<td>9%</td>
</tr>
</tbody>
</table>

0 to 100 Score

- Municipal: 64
- Regional: 61
- Provincial/Territorial: 57
- Federal: 58
Service Quality Scores on a Par with Recent Highs

LONG-TERM TREND IN SATISFACTION WITH THE NATIONAL BASKET OF SERVICES

0 to 100 Score*


64 64 67 73 72 74 74 71

*The CF8 National Basket of Services score is based on an average 0-100 rating for a group of 22 services provided by all levels of government. (Refer to the Citizens First 8 report for details). Services of Canada Revenue Agency were added for the first time in Citizens First 8. Without this service, the National Basket score is 72.
CLIENT SATISFACTION INDEX
Client Satisfaction Index

CSI

I was satisfied

Best service anywhere

Exceeded my expectations
Canadians are Positive about Recent Government Service Experiences

CLIENT SATISFACTION INDEX, 2018
Jurisdictional Average
0 to 100 scores

CSI
63

70
I was satisfied

61
Best service anywhere

59
Exceeded my expectations
Channel Usage and Satisfaction

**MAIN CHANNELS USED**
- **OFFICE**
  - CF8: 33%
  - CF7: 37%
- **PHONE**
  - CF8: 29%
  - CF7: 29%
- **WEBSITE**
  - CF8: 26%
  - CF7: 25%

**CLIENT SATISFACTION INDEX (CSI)**
- **OFFICE:** 67
- **PHONE:** 59
- **WEBSITE:** 63
RATING OF SERVICE ATTRIBUTES
## Performance for Service Attributes

**Based on respondents in the Federal Government Jurisdictional Survey**

<table>
<thead>
<tr>
<th>Service Attribute</th>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
<th>Juris. Avg.</th>
<th>Best in Class</th>
<th>CF7 Avg.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Language**</td>
<td>12%</td>
<td>29%</td>
<td>56%</td>
<td>84</td>
<td>n/a</td>
</tr>
<tr>
<td>Fairness</td>
<td>3%</td>
<td>15%</td>
<td>31%</td>
<td>80</td>
<td>87</td>
</tr>
<tr>
<td>Privacy</td>
<td>3%</td>
<td>5%</td>
<td>18%</td>
<td>75</td>
<td>78</td>
</tr>
<tr>
<td>Communication</td>
<td>4%</td>
<td>6%</td>
<td>18%</td>
<td>75</td>
<td>80</td>
</tr>
<tr>
<td>Outcome</td>
<td>6%</td>
<td>5%</td>
<td>15%</td>
<td>75</td>
<td>82</td>
</tr>
<tr>
<td>Channel Satisfaction</td>
<td>4%</td>
<td>5%</td>
<td>17%</td>
<td>75</td>
<td>81</td>
</tr>
</tbody>
</table>

**Citizens First 8**

**Juris. Avg.**

**Best in Class**

**CF7 Avg.**
Performance for Service Attributes

**Based on respondents who had issues or problems when accessing the service**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Channel</td>
<td>5% 6% 17%</td>
<td>34% 38%</td>
</tr>
<tr>
<td>Ease of Access</td>
<td>5% 6% 17%</td>
<td>33% 38%</td>
</tr>
<tr>
<td>Timeliness</td>
<td>6% 7% 18%</td>
<td>32% 37%</td>
</tr>
<tr>
<td>Future Issues</td>
<td>6% 7% 20%</td>
<td>35% 33%</td>
</tr>
<tr>
<td>Timely Help</td>
<td>7% 8% 20%</td>
<td>32% 34%</td>
</tr>
<tr>
<td>Issue Resolution**</td>
<td>24% 20% 23% 18% 15%</td>
<td>45% 52% 68%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>74</td>
<td>79</td>
<td>75</td>
</tr>
<tr>
<td>73</td>
<td>79</td>
<td>74</td>
</tr>
<tr>
<td>71</td>
<td>77</td>
<td>76</td>
</tr>
<tr>
<td>70</td>
<td>75</td>
<td>72</td>
</tr>
<tr>
<td>70</td>
<td>76</td>
<td>76</td>
</tr>
<tr>
<td>45</td>
<td>52</td>
<td>68</td>
</tr>
</tbody>
</table>
## Performance for Staff Service Attributes

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge</td>
<td>3% 4% 13%</td>
<td>33% 46%</td>
<td>79</td>
<td>83</td>
<td>79</td>
</tr>
<tr>
<td>Competence</td>
<td>3% 5% 14%</td>
<td>31% 46%</td>
<td>78</td>
<td>82</td>
<td>78</td>
</tr>
<tr>
<td>Felt Good</td>
<td>4% 6% 14%</td>
<td>32% 44%</td>
<td>77</td>
<td>82</td>
<td>77</td>
</tr>
<tr>
<td>Extra Mile</td>
<td>8% 10% 20%</td>
<td>30% 32%</td>
<td>67</td>
<td>74</td>
<td>67</td>
</tr>
</tbody>
</table>

0 to 100 Score

- Strongly Disagree: 0 - 20
- Strongly Agree: 80 - 100

Citizens First 8
Performance for Channel Specific Attributes

Across jurisdictions, performance is strongest with respect to providing information and security on the website, as well as for office wait times. Performance is relatively weaker when it comes to website navigation and visual appeal, as well as for being able to get through to a telephone agent without difficulty.

<table>
<thead>
<tr>
<th>Channel Specific Attributes</th>
<th>Juris. Avg.</th>
<th>Best in Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information (Web)</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Security (Web)</td>
<td>40%</td>
<td>34%</td>
</tr>
<tr>
<td>Waiting Time (Office)</td>
<td>29%</td>
<td>44%</td>
</tr>
<tr>
<td>Navigation (Web)</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>Appeal (Web)</td>
<td>35%</td>
<td>23%</td>
</tr>
<tr>
<td>Access (Telephone)</td>
<td>28%</td>
<td>28%</td>
</tr>
</tbody>
</table>

0 to 100 Score

Strongly Disagree

Strongly Agree
PRIORITIES FOR IMPROVEMENT
Note that “Impact” represents squared Pearson’s correlation coefficients (pairwise against the dependent variable (the 3-item CSI)) and “Performance” represents the average score among participating jurisdictions (0 to 100) for each driver (independent variable). Base: Jurisdictional Survey respondents who rated a specific service (bases vary).
Focus on Key Drivers of Satisfaction

- Issue Resolution/Future Issues
- Timely Help
- Timeliness
- Extra Mile
- Access (Telephone)
SERVICE EXPECTATIONS
Expectations for Timeliness on the Telephone and Online Findability are Not Currently Being Met

<table>
<thead>
<tr>
<th>Activity</th>
<th>Experience</th>
<th>Canadian Service Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time spent waiting at an office</td>
<td>19</td>
<td>20</td>
</tr>
<tr>
<td>Time spent on the telephone</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>Time spent looking online</td>
<td>5</td>
<td>14</td>
</tr>
</tbody>
</table>

TIMELINESS: EXPECTATIONS VS. EXPERIENCE
Amount of Time (Minutes)
Performance by Time Spent

CSI BY TIME SPENT FINDING INFORMATION OR STARTING SERVICE TRANSACTION

Scores

<table>
<thead>
<tr>
<th></th>
<th>Telephone</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 Minutes or Less</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>11 to 20 Minutes</td>
<td>64</td>
<td>62</td>
</tr>
<tr>
<td>Over 20 Minutes</td>
<td>55</td>
<td>44</td>
</tr>
</tbody>
</table>

0 to 100
Service Experience by Number of Channels Used

CLIENT SATISFACTION INDEX

Number of Channels Used

<table>
<thead>
<tr>
<th>One</th>
<th>Two</th>
<th>Three or More</th>
</tr>
</thead>
<tbody>
<tr>
<td>67</td>
<td>61</td>
<td>59</td>
</tr>
</tbody>
</table>

Jurisdictional Average
MOTIVATING CLIENTS TO USE THE ONLINE CHANNEL
Behavioural Science: the MAPS Lens

**PERSONAL**
- M (MOTIVATION)
  - Automatic (System 1)
  - Reflective (System 2)
- A (ABILITY)
  - Psychological
  - Physical

**SITUATIONAL**
- P (PHYSICAL Context)
- S (SOCIAL Context)

= BEHAVIOUR
Overcoming Barriers: Leverage Points

Getting Canadians to access government services online involves a complex behaviour which is driven by five of the six main sources of behaviour. That said, the top two drivers are reflective motivation and psychological ability.

- **MOTIVATION**
  - Automatic (System 1)
  - Reflective (System 2)

- **ABILITY**
  - Psychological
  - Physical

- **PHYSICAL Context**

- **SOCIAL Context**

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**BEHAVIOUR**
Leverage Points and Interventions

Outlined to follow are the two most important drivers of online uptake of government services, the leverage points, the recommended types of interventions, and examples of potential interventions.

<table>
<thead>
<tr>
<th>Main Drivers of Behaviour:</th>
<th>Leverage Points:</th>
<th>Interventions:</th>
<th>Examples of Interventions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflective Motivation</td>
<td>Ease and confidence in the website and online support.</td>
<td>• Education</td>
<td>• Information about behaviour and consequences</td>
</tr>
<tr>
<td>(rational thought, i.e., beliefs consequences, beliefs capabilities, goals, etc.)</td>
<td></td>
<td>• Persuasion</td>
<td>• Feedback on behaviour</td>
</tr>
<tr>
<td></td>
<td>Feeling knowledgeable and experienced with using websites or apps and online government services.</td>
<td>• Incentivization, Coercion</td>
<td>• Feedback on outcomes</td>
</tr>
<tr>
<td>Psychological Ability</td>
<td></td>
<td>• Education</td>
<td>• Monitoring of behaviour</td>
</tr>
<tr>
<td>(i.e., knowledge, memory)</td>
<td></td>
<td>• Training</td>
<td>• Information about behaviour and consequences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Enablement</td>
<td>• Demonstrations, instructions, feedback</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Social support</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Goal setting</td>
</tr>
</tbody>
</table>
Overcoming Barriers: Leverage Points

Clients will use the online channel to access government service when:

• They perceive that it will be easy, and they feel knowledgeable and experienced, and
• They have confidence in the website or app and in online support.
Overcoming Barriers: Interventions and Operationalizing

The most effective actions that governments can take to increase the uptake of the online channel are:

• Education and training,
• Persuasion and Incentivization, and
• Enablement.

To operationalize these findings, the recommended approach is for government service providers to consult with internal stakeholders and with end-user clients to explore specific strategies for action that are build on the understanding of the underlying motivations for this behavior.
CONNECTING WITH CLIENTS ONLINE
AWARENESS OF WHETHER THE SERVICE IS AVAILABLE ONLINE

25%
Support for Online Interactions

Would be more likely to access government services online if....

- There is a person you can chat with online if you have any questions (70%)
- There is a telephone number that you can call if you need help understanding how to use the website (66%)
- You could leave a question at the website that would be answered by email within 24 hours (63%)
Common Services Card

While most citizens think that a common services card is a good idea, there is a minority who will oppose this move.
Online and Social Media

- **64%**
  - RECEIVED SERVICES OR TRANSACTED WITH GOVERNMENT ONLINE IN PAST 12 MONTHS

- **31%**
  - INTERACTED WITH GOVERNMENT USING SOCIAL MEDIA

- **73%**
  - INTERESTED IN GETTING EMERGENCY ALERTS VIA SOCIAL MEDIA

Base: National Survey respondents who use online services at least occasionally