



TAKING CARE OF BUSINESS

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TAKING CARE OF BUSINESS 4

Final Report

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The mission of the Institute for Citizen-Centred Service is to promote high levels of citizen satisfaction with public sector service delivery. The Institute, which is based in Canada, achieves its mission by undertaking research to identify citizens' service needs and expectations, and by assisting the public sector in applying innovative solutions that support service quality.

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EXECUTIVE SUMMARY

Taking Care of Business is a pan-Canadian survey commissioned by a group of provincial and municipal governments for the purpose of gathering information to help measure governments' performance in the delivery of public service. Taking Care of Business 4 (TCOB4) marks the fourth wave of this research to capture perceptions and satisfaction with government services for businesses. TCOB4 continues to highlight what is working well, determine the strongest 'drivers' of satisfaction and priorities for improvement. To complement these insights, TCOB4 also targets timely issues that are actively shaping service-delivery agendas, such as 'red tape' and 'self-service / emerging channels'. This research enables governments to monitor their performance over time, develop ways to improve the service experience and introduce new methods of delivery that meet the changing needs of the Canadian business community.

TCOB4 draws on the experiences of over 4300 businesses in 11 jurisdictions across Canada. Research results are based on a telephone/online survey, conducted by R.A. Malatest & Associates Ltd. between April and July 2013. Participants were selected using a random sampling approach and represent all non-government sectors of the economy, from all provinces and territories. Each interview took approximately 22 minutes to complete, with a valid response rate of 12.6%. The margin of error that is normally associated with a sample of this size (at the national level) is $\pm 1.5\%$, 19 times out of 20.

Quick Facts

TCOB4 measures client satisfaction with nine service-to-business categories.

Overall satisfaction ("Overall, I was satisfied with the service I received") is one of seven questions comprising the Client Satisfaction (CSat) Index. The 2013 overall satisfaction score is 63.4, a modest decline since TCOB3 (64.1).

At the national level, the average CSat Index score is 58.7. To improve satisfaction scores, public sector decision makers need to focus their efforts on ensuring that client issues are easily resolved and that clients are satisfied with the amount of time it takes to get any help needed.

Are businesses getting good service from governments?

The overall service reputation of both federal and provincial levels of government appears to be improving. Since 2010, more businesses felt that government policies and regulations contribute to a level playing field in their sector. However, the majority of respondents continued to report that they do not get “good value for their tax dollars” or that “governments are open and accountable” (average scores less than 50/100).

Many Canadian businesses reported that their recent experience receiving a government service could be improved. This is primarily due to weaker performance on the key drivers of satisfaction, Issue Resolution and Delivery Timeliness. Service managers across the nation are encouraged to share their successes and best practices to improve these areas:

- **Businesses expressed that any issues they experienced during the service process were not easily resolved.** Performance on this item has declined by nearly 5 points at the national level.
- While satisfaction with the amount of time needed to receive a service has improved (increased by nearly 3 points since TCOB3), **businesses were less satisfied with the amount of time it took to get any help needed.**

Satisfaction with Service Design was strong across the nation, particularly in regards to businesses receiving the information they needed to receive the service. However, many respondents were less satisfied with whether getting the service was easy and if it placed an unreasonable burden on their business. The latter attribute also alludes to the link between red tape reduction and overall client satisfaction. Given that it is another key area of the service experience, governments should continue to improve on Service Design and take initiative to reverse any downward trends.

Although Staff Interaction was a relatively weak driver of client satisfaction, businesses attributed some importance to how interaction with staff made them ‘feel’. Scores for all staff attributes have made significant improvements since TCOB3. The current upward trend may be accelerated if service managers shift their focus to ensure that staff not only understand client needs, but also make every effort to address their needs.

The channel specific experience was also a weak driver of overall client satisfaction. **Interestingly, the two channels that are most preferred correspond to the strongest (website) and weakest (telephone) satisfaction scores.** This indicates that recent efforts to improve online options are working, but service managers should not lose sight of traditional channels such as the telephone.

Further insight into service-to-business issues is gained by exploring self-service options and red tape reduction:

There is a growing opportunity for providing self-service options to businesses in Canada. **Over 75% of respondents agreed/strongly agreed that they would like to be able to access all routine government services online.** The most effective potential incentives for encouraging self-service practices include the ability to connect to a 'live' person while online and the potential for reduced fees. The perceived benefit of 'bundling' different services has increased by 10 points since TCOB3.

The vast majority of businesses (more than 90%) reported that over the past 3 years, red tape burden has either increased or stayed the same. **Respondents who indicated that red tape burden had increased were less likely to be satisfied with their recent service experience than those who said it decreased or remained the same** (difference of more than 8 points on the Client Satisfaction Index). Nonetheless, governments do appear to be succeeding in their efforts to engage the business community in regulatory reforms. These initiatives should be expanded to reduce red tape burden overall.

What can governments do to improve service to businesses?

Based on the key findings of TCOB4, the following actionable recommendations have been developed for improving public sector services to Canadian businesses:

- 1. Manage business expectations by publishing planned service improvements.** The questions comprising the Client Satisfaction Index that performed weakest were related to the societal context. Businesses were less likely to report that the service they experienced was the best offered anywhere, or that the service they experienced exceeded their expectations. Given that exceeding clients' expectations is more challenging than achieving 'mere' satisfaction, governments need to better engage the business community (e.g., through social media, newsletters, etc.) regarding the latest developments in public sector services.
- 2. Establish service standards on the administration of all types of services, not just regulatory requirements.** While satisfaction scores lagged for "getting the service did not place an unreasonable burden on my business," many businesses reported that establishing service standards (e.g., notification of when all documentation has been received) would be an effective way to reduce burden. In order to manage business expectations, service standards should be practical, achievable, and clearly articulated (e.g., expected timeframes for receiving a response to an inquiry by phone vs. email). Service managers also need to be transparent with employees and the public about what will be done to uphold these standards.
- 3. Develop a set of protocols for resolving client issues.** These procedures should be channel and service type specific (e.g., prioritizing calls based on the complexity of a problem, the number of previous contacts made, and the date/time of the most recent call). Businesses should also be made aware of any available resources for making complaints.

4. **Ensure that all services are accessible by the most efficient channels.** For businesses, time is money—this is evidenced by the strength of Delivery Timeliness as a predictor of overall client satisfaction. Overall satisfaction scores also dropped when businesses had to use more than one channel. Service providers should not only improve efficiency across all channels, but encourage businesses to use the channel most appropriate for their service needs. The introduction of a ‘convenience fee’ is not recommended, as an overwhelming majority of businesses are not willing to pay to ‘skip the line’ (68% disagree/strongly disagree) to get a government service or product more quickly.
5. **Continue expanding self-service options and address business concerns regarding data security.** The majority of business respondents were not only interested in online access, but would also accept using the online channel if it were the only option. To encourage online use, service managers should ensure that businesses have access to a ‘live’ person when navigating a government website. Governments also need to build greater awareness of the security measures taken to protect business information online.
6. **Service staff should not only be trained on understanding client needs, but how to make every effort to address them.** Businesses, like citizens, value how interaction with staff makes them ‘feel’. Although governments across the nation have shown improvements in this area, service managers should not lose sight of the ‘emotional’ dimension of the personal experience. Staff should demonstrate a strong understanding of business needs and handle unmet expectations with effective ‘soft skills’, so clients can still be confident that every effort will be made to address any future issues.

SECTION 1: INTRODUCTION

The ICCS is a non-profit organization created to support the efforts of the Public Sector Service Delivery Council (PSSDC) and Public Service Chief Information Officer Council (PSCIOC). As a centre of expertise in government service delivery, the mission of the ICCS is to “support public-sector organizations achieve high levels of citizen and business satisfaction”. It accomplishes this by undertaking research that identifies citizens’ and businesses’ service needs, expectations, satisfaction, and priorities for service improvement. The ICCS continues to learn more about the government service experience through the Citizens First (CF) and Taking Care of Business (TCOB) studies. In turn, the ICCS plays a key role in providing service delivery managers with information and insights that will help them to improve that experience.

Background

Results from the first Taking Care of Business (TCOB) survey were published in 2004. Modeled on the Citizens First series (launched in 1998), TCOB focuses on the perspectives of Canadian businesses with respect to the delivery of government services. This research started the first analysis of drivers of satisfaction for business clients and presented important initial findings, including the importance of having seamless delivery from multiple levels of government. Taking Care of Business 2 (published in 2007) provided further insights into business clients’ drivers of satisfaction and implications for public sector managers. Conducted in 2010, Taking Care of Business 3 (TCOB3) results indicated that while overall satisfaction with government improved relative to 2007, opportunities existed to improve service delivery to businesses. TCOB3 underscored the importance of ensuring that businesses can easily access the information or service they need to conduct business with governments, and identified the online channel as an expanding opportunity in government service access.

Building on this body of research, the ICCS commissioned the fourth instalment of TCOB in 2013. Taking Care of Business 4 (TCOB4) continues to report key trends and changes from previous waves of the survey, while focusing on developing actionable insights from the data collected. TCOB has kept pace with the evolving service environment and looks beneath the surface at what drives satisfaction with government services. Over the last decade, the public sector has experienced significant changes in the field of service delivery. Taking Care of Business continues to set the standard for research-based improvements to service delivery in government. Based on TCOB4 results, each of the eleven partner jurisdictions can track progress over time and identify specific priorities for improving service delivery to businesses.

Purpose and Objectives

Taking Care of Business (TCOB) is a series of research initiatives that are specifically designed to capture perceptions and satisfaction with government services for businesses. TCOB4 builds upon the successes of previous research efforts which excelled at identifying concrete ‘drivers’ (correlated indicators) of business satisfaction with services, and incorporates analytical innovations to help provide a more ‘nuanced’ understanding of service-to-business issues. The primary objectives of TCOB4 are listed below:

- Replicate and enhance specific measures from the previous iterations of Taking Care of Business, report trends, and highlight important changes. These were designed to provide Performance Measures as well as in-depth actionable analysis to help jurisdictions further improve service to businesses.
- Explore issues related to ‘red tape’ and other involuntary services issues, such as the links between regulation and service reduction.
- Explore issues related to ‘self-service’, including motivators and barriers to moving services online and opportunities to support the achievement of service transactions through online channels.

Notwithstanding a smaller sample size at the jurisdictional level, TCOB4 collected more in-depth information from business. The survey probed respondents on moving government services online and emerging channels. It also examined business involvement/satisfaction with the formulation and implementation of new initiatives/regulations. Furthermore, a new analytic approach was introduced in 2013, which defined a set of client satisfaction components in a broadly grounded Client Satisfaction Model (discussed further below). The TCOB4 survey included new questions (approximately 30 measures) to develop the ICCS Indices of Client Satisfaction.

Methodology

A minimum target of 380 survey completions was established per jurisdiction, with the exception of Northwest Territories and the Yukon. Each jurisdictional target was met or was exceeded and the total number of completions (4,342) was slightly larger than that of TCOB3 (4,111 completions). The margin of error associated with a sample of this size is $\pm 1.5\%$, 19 times out of 20. The larger sample size at the national level was due to additional partners joining the study. The overall response rate (12.6%) was slightly lower than TCOB3 (13.3%), reflecting a growing challenge of fielding surveys with business respondents. Various efforts were made to encourage participation, such as additional incentives, a reduced survey length, and the option of completing the survey online.

TCOB4 drew on the experiences of respondents seeking government services from nine service-to-business categories (see Section 2). In order to explore additional issues while still reducing the length of the survey, this wave of TCOB undertook a modular approach. Questions related to self-service options were asked to 50% of respondents (at the national and jurisdictional level), while the remaining respondents provided their opinions on red tape reduction.

Using both telephone and online survey administration, TCOB4 surveyed Canadian businesses in nine different industries across Canada. The study also included participation from 187 Aboriginal businesses registered in the Aboriginal Business Directory. A minimum sub-sample of 380 businesses was targeted for each partner jurisdiction (excluding the Yukon, Northwest Territories and rest of Canada) to ensure that the margin of error would be $\pm 5\%$ for jurisdiction specific analysis. As a result, the final sample

contains a larger number of businesses from some jurisdictions than would otherwise occur in the business population. To compensate for this misrepresentation, a weighting factor was developed to "weight down" the over-sampled jurisdictions and "weight up" the under-sampled jurisdictions. This weighting factor adjusts the sample distribution by business size (i.e., number of employees), according to the December 2012 edition of Canadian Business Patterns published by Statistics Canada. Unless otherwise noted, the report analysis is based on the weighted response.

Reporting and Analysis

Throughout the survey, respondents were asked to indicate their level of agreement with a range of questions based on a 5-point scale, with 5 representing the highest positive rating and 1 the lowest rating. For analytical purposes, results in applicable cases were then converted using a "mean" or "average" of all responses on a 5-point scale (0/25/50/75/100). Average scores enabled comparisons with previous TCOB studies and other similar research that utilize this reporting metric. Statistically significant scores (at the 95% confidence level) are indicated in this report by boldface. In general, scores above 50 indicate that a majority were favourably disposed with respect to the identified issue, whereas a score below 50 indicates that the majority held a negative opinion with respect to the selected issue.

In general, data in the report is presented using the "average" score approach or "percent of respondents," which details the proportion (defined as percent of the valid frame) who indicated that they "agreed"/"strongly agreed" or were "satisfied"/"very satisfied" with a particular element of the service. For the purpose of measuring satisfaction, data is presented using the average score approach. Reporting excludes those who did not answer the question or provided a "no opinion" response.

The ICCS Client Satisfaction Model

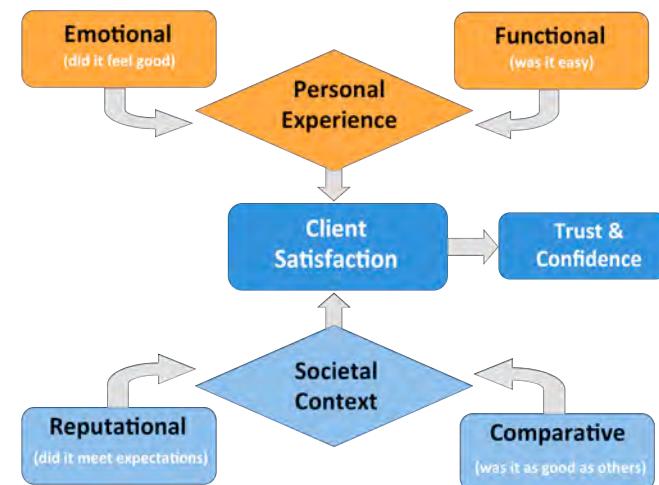
In TCOB4, overall satisfaction was measured using a multi-item composite known as the Client Satisfaction (CSat) Index. This composite measure is based on the ICCS CSat Model, which incorporates both the individual service experience (personal experience) and the broader “cultural” environment in which the service experience takes place (societal context). This analytical framework connects service quality, client satisfaction, reputation, and trust and confidence in an integrated model that allows for the analysis of data to shed light on these relationships.

The dimensions within the personal and societal contexts were developed based on insight established through previous iterations of Taking Care of Business and Citizens First. The personal experience is the component of CSat that is most directly under the control of the service provider. It has been almost exclusively focused on by public service providers to date. The functional dimension of this component reflects the technical/mechanical aspects of service delivery, while the emotional dimension reflects the strength of emotional engagement in the service experience (telephone and in-person channels):

- The functional dimension includes aspects such as access, timeliness, information, staff knowledge and competence, information, and privacy. The functional dimension is also more than the sum of its parts; taking a holistic approach, such drivers are all components of the question “How easy is it to get the service I need?”.
- The emotional dimension has been partially reflected in those staff quality drivers associated with extra mile, fairness, and courtesy, but has not been recognized or addressed as a discrete component until TCOB4. Research such as Gallup’s Human Sigma and the 2010 Kiwis Count study has demonstrated that an emotional connection between service provider and the client in the service experience is critical to the achievement of client satisfaction.

The societal context is the component of CSat over which the service provider has no immediate control, but which nonetheless shape the clients’ perceptions in the service experience:

- The comparative context determines how the experience compares with service experiences from other private and public service providers.
- The reputational context determines what past experience and personal and societal expectations the client has regarding public services.



The ICCS CSat Model© is the property of the Institute for Citizen-Centred Service

Regression Analysis

Similar to TCOB3, regression analysis was conducted to assess the impact of the various drivers of client satisfaction. Drivers are those important service elements that have a significant impact on satisfaction. Drivers are fundamental to service improvement, as they help identify where the biggest gains can be made in the management and delivery of service. For TCOB4, drivers of satisfaction are examined by five Client Satisfaction (CSat) Sub-Indices developed by the ICCS. Also serving as performance measures for benchmarking in future studies, these aspects of the service experience are related to how easy it was to get the service, timeliness with service delivery, how issues or complaints were addressed, interaction with staff, and satisfaction with service channels.

The appropriate grouping of attributes into these CSat Sub-Indices was confirmed by conducting factor analysis. To identify drivers of client satisfaction, these factors were used in an overall regression model, with a multi-item Client Satisfaction Index as the dependent variable. The results provided for the overall model include standardized beta coefficients, which indicate the relative importance of each driver. The overall explanatory power of the model was derived by generating an adjusted R^2 (the amount of variance that can be predicted by using the model). Drivers with higher beta coefficients can be considered as more important for influencing service satisfaction (i.e., the higher the beta coefficient, the greater the impact that driver has on overall satisfaction).

SECTION 2: CHARACTERISTICS OF THE BUSINESS COMMUNITY

Who responded to the survey?

Businesses responding to the TCOB4 survey were of varying sizes (i.e., number of employees), years in operation, and economic sectors. As shown in the table below, the survey sample was primarily composed of smaller businesses, employing between 1 and 19 employees (81%). The majority of businesses had also been operating for at least 5 years (88%). Businesses operating for a longer period of time are more likely to have interacted with the government on multiple occasions and received different types of government services.

In terms of economic sector, nearly 50% of business respondents operated in the retail industry (including accommodation, food and beverage services) or professional services. The final sample also included 187 completions with Aboriginal business respondents, reflecting approximately 4% of the total sample.

Table 1

Years in Operation	Canada
20 years or more	48%
5 years to less than 20 years	40%
2 years to less than 5 years	9%
6 months to less than 24	3%
Less than 6 months	1%

Un-weighted data (n = 4,315)

Size of Business (Employees)	Canada
1 to 4	45%
5 to 19	36%
20 to 99	14%
100 or more	5%

Un-weighted data (n = 4,305)

Industry or Economic Sector	Canada (%)
Accommodation, food and beverage / retail services	25%
Professional and business services / finance, insurance, real estate	22%
Health / education / social services	18%
Construction	9%
Wholesale trade / transportation, communications and utilities	7%
Arts, Entertainment and Recreation	6%
Manufacturing	5%
Primary industry	3%
Agriculture / Agri-food	2%
Other	4%

Un-weighted data (n = 4,341)

Quick Answer

- 81% were smaller businesses (less than 20 employees)
- 88% were in operation for at least 5 years
- 47% were providing retail (including accommodation and food and beverage) or professional services

Which government services are used by businesses?

In order to explore the factors that contribute to a satisfactory service experience, businesses were asked a number of questions regarding a recent experience (within the past 6 months) with government services. **Service experiences were analyzed according to the following service-to-business categories** (groupings of services that fall under similar service departments or functions). Comparability with previous waves was maintained by mapping these categories to the TCOB3 baskets of services.

Table 2

Service Category	Definition	Specific Service Interactions
Finance	Services related to the management of the financial assets and liabilities of the business	Financing, grants, financial advisory, accounting
Tax	Services related to fulfilling the tax obligations of the business	Corporate tax, sales tax, tax credits, tax advice
Legal	Services related to the management of the legal entity and other related obligations of the business	Legal structure, dispute resolution, adjudication, registration, authority
Property, Plant and Equipment	Services related to the management of the physical and intellectual property of the business	Building permits, zoning, copyright, data storage, leasing, facilities, licenses
Environment	Services related to managing and protecting the environment	Pollution, environmental stewardship, environmental assessments, licenses
Transportation	Services related to the management of the movement and delivery of goods and services	Vehicle licensing, parking permits, transportation of hazardous materials
Customer and Marketplace	Services related to the customers, clients and Marketplace	Export markets, import regulations, market research, client information, ombudsman,
Human Resources	Services related to the management of the employees and contractors of the business	Hiring, firing, training, learning and development
Health and Safety	Services related to managing the obligation to protect the health of employees, customers and the public, and deal with workplace hazards	Workers' compensation, insurance, compliance with safety standards, incident reporting

TCOB4 also analyzed businesses' recent government service experience according to the following service types (groupings of services that are delivered in a similar way or share a similar service context). Some types of services (e.g., informational/advisory) are clearly more complex, requiring more time and effort on the part of the service seeker. Service types are not mutually exclusive, as many interactions with government services were counted up to two times. It should be noted that this categorization was a first attempt at defining "like" services according to a common set of characteristics, related to the specific service interaction or the nature of the service itself.

Table 3

Service Type	Definition
Transactional	The physical exchange between government and clients of a tangible good or service, excluding information. Example interactions include financing, grants, accounting, corporate tax, sales tax, tax credits, tax advisory, registration, building permits, zoning, copyright, data storage, leasing, licences, environmental assessments, parking permits, working compensation, insurance, incident reporting, bylaws, programs, and subsidies.
Informational/Advisory	Requests for information or advice only. Example interactions include financial advisory, tax advisory, legal structure, authority, environmental stewardship, transportation of hazardous materials, export markets, import regulations, market research, client information, protecting customer privacy, travel warnings, hiring, firing, training, learning and development, and billing inquiry.
Regulatory	Required by government. Example interactions include corporate tax, sales tax, dispute resolution, adjudication, registration, building permits, zoning, copyright, data storage, leasing, licences, environmental assessments, vehicle licensing, parking permits, working compensation, insurance, and bylaws.
Non-Regulatory	Not required by government, obtained by choice. Examples include all service interactions that are not regulatory, such as grants, learning and development, environmental stewardship, etc.

When comparing micro businesses (1-4 employees) with large businesses (100 or more employees), the proportion of informational and non-regulatory service interactions increased by at least 10%. Under limited resources, however, potential improvements need to be applicable to the most widely used service types. The chart below shows that the Canadian business community (composed primarily of smaller businesses) largely interacts with government to receive transactional or regulatory services. When introducing changes, managers should therefore prioritize services that are of a transactional or regulatory nature.

Table 4

Business Size By Number of Employees	1 to 4	5 to 19	20 to 99	100 or more
<i>Sample size (un-weighted base)</i>	1849	1426	549	210
Transactional	73%	69%	66%	63%
Informational	27%	31%	34%	37%
Regulatory	64%	60%	60%	51%
Non-Regulatory	36%	40%	40%	49%

The proportion of businesses using different service types are also shown below according to the number of years they have been in operation. New businesses were more likely to use transactional services, while those operating for more than 6 months sought informational services more often. **Given that the vast majority of Canadian businesses have been in operation for at least 5 years (>85%), potential service improvements may not necessarily have to be customized for new businesses.** Uptake of regulatory and non-regulatory services was fairly consistent across businesses of varying years in operation.

Table 5

Years in Operation	< 6 months	6 months - 24 months	2 years - 5 years	5 years - 20 years	> 20 years
<i>Sample size (un-weighted base)</i>	39	119	366	1605	1916
Transactional	82%	71%	73%	70%	70%
Informational	18%	29%	27%	30%	30%
Regulatory	59%	65%	62%	61%	61%
Non-Regulatory	41%	35%	38%	39%	39%

Do businesses use specific channels based on service type?

The table below details the various service-to-business types by channel. **Telephone and website are the most frequently used channels for all service interactions, indicating that any future service changes or improvements should be adopted by both methods.**

When receiving transactional services, more businesses used posted mail than those who used e-mail or visited a government office in-person. Conversely, usage of e-mail and in-person visits was higher than posted mail for businesses seeking informational services. Regulatory services were accessed almost equally by mail and in-person visits, while non-regulatory services were sought relatively more often via e-mail.

Usage of kiosk, social networking media, and mobile application was minimal for all types of services. It should be noted that the number of business services that are offered via emerging channels such as social media and mobile applications was undetermined. Taking Care of Business will continue to monitor their usage as governments move towards these emerging channels in the future.

Table 6

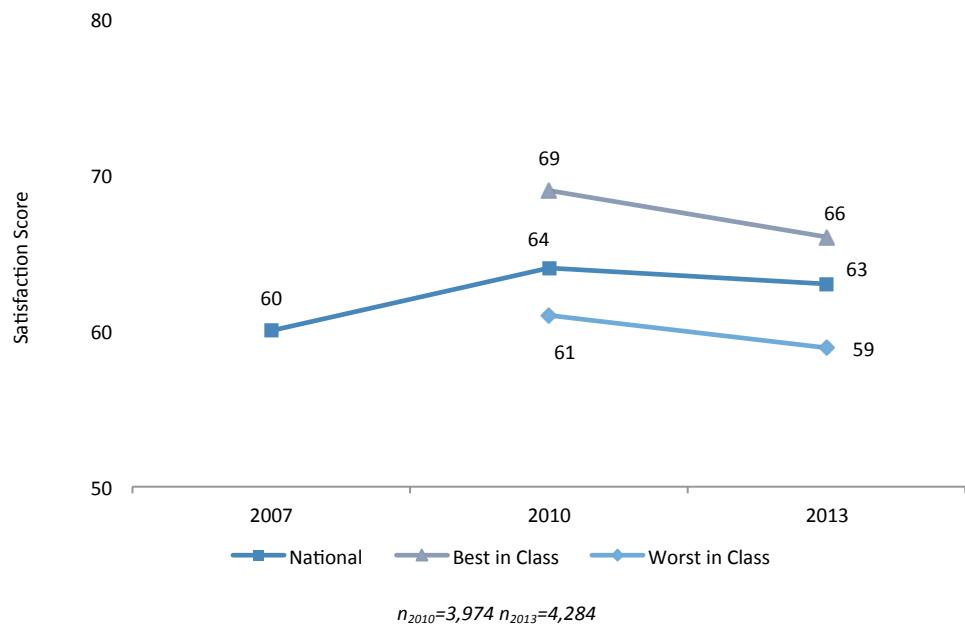
Channel	Transactional	Informational	Regulatory	Non-Regulatory
<i>Sample size (un-weighted base)</i>	2860	1208	2498	1570
Telephone	35%	35%	33%	37%
Website	28%	31%	28%	32%
Mail or Parcel Service	12%	4%	12%	6%
E-mail	9%	11%	7%	13%
In-person visit to a government office	8%	13%	11%	6%
Visit from a government representative	5%	2%	5%	2%
Fax	1%	1%	1%	2%
Kiosk	0%	0%	0%	0%
Social networking media	0%	0%	0%	0%
Mobile Application	0%	0%	0%	0%
Total	100%	100%	100%	100%

SECTION 3: NATIONAL TRENDS

To fully understand the business client's perspective, the TCOB4 survey followed respondents through a recent government service experience. Overall satisfaction with the entire service experience was captured by the rating question, "Overall, I was satisfied with the service I received". This measure is one of seven components comprising the Client Satisfaction Index, and was used for trending.

Overall satisfaction among Canadian businesses declined slightly since TCOB3 (lower by roughly 1 point), but remained above TCOB2 levels. This stability does not necessarily indicate that there is a ceiling beyond which governments would be unable to advance. Overall satisfaction is an average score and it may be the case that some jurisdictions or some services have seen continuous improvements, while others have stabilized, declined or fluctuated. A case in point is the best in class score, which experienced a steeper drop than the national average (by roughly 3 points since TCOB3). In order to reach any specific conclusions, it is important to examine the individual satisfaction scores by level of government, channel, service category, and service type.

Figure 1



Which level of government is the top overall performer?

The chart below shows overall satisfaction scores by level of government.

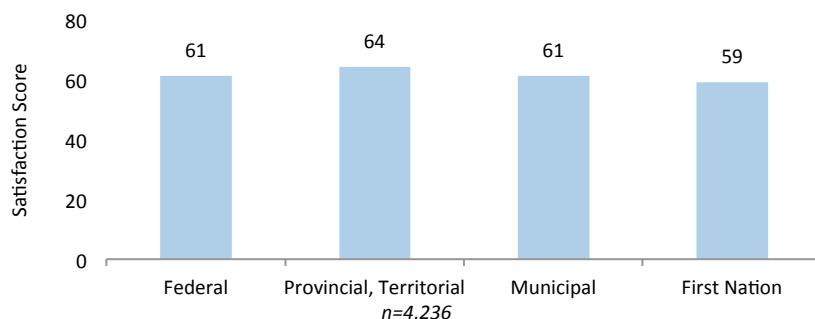
Keeping in mind that a business may interact with multiple levels of government to receive a service, it is notable that **only a 5 point gap separates the strongest (provincial and territorial governments) and weakest (First Nations) performers.**

These scores also reflect the ratings of respondents across Canada (not just partner jurisdictions), who may not necessarily be concerned about which level of government provided a service. **Efforts to improve satisfaction levels should encourage managers to work collaboratively, so that good service is consistent across all levels of government.**

Quick Answer

The average Canadian business was most satisfied when receiving services from their provincial/territorial government.

Figure 2



Which channel is the top overall performer?

Overall satisfaction varied by the primary channel used to receive a service (scores range from 68 to 58). **Among the most frequently used channels, businesses accessing government websites reported the highest satisfaction scores (68), while those using the telephone channel were least satisfied (58).** Among the less frequently used channels, businesses *receiving a visit* from a government representative were more satisfied than those who conducted an in-person visit to a government office. **Given that telephone is used by nearly 1 in 3 businesses, and is the 2nd most preferred (see Section 6), governments may need to focus efforts on improving services provided through this channel.**

Quick Answer
The average Canadian business was most satisfied with services received via government websites.

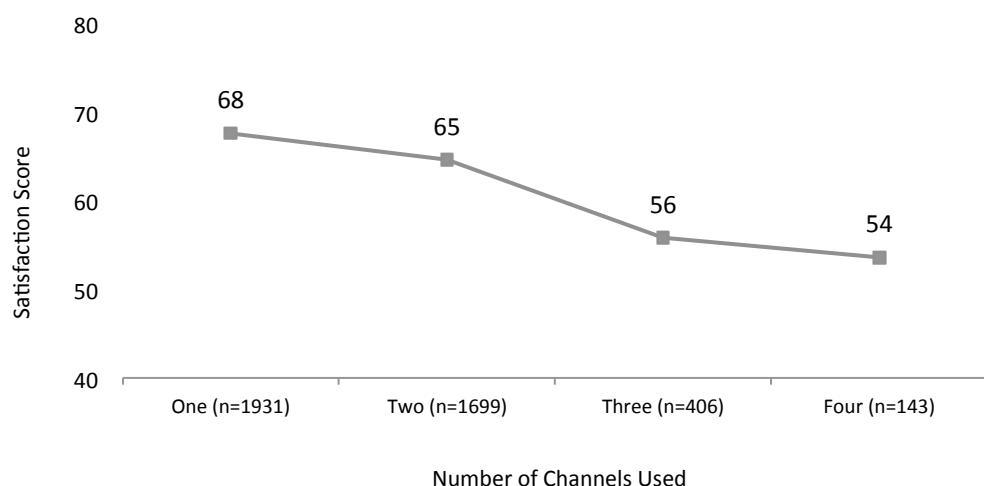
Figure 3



How does satisfaction vary by the number of channels used?

Overall satisfaction levels also vary by the total number of channels used during the entire service experience. **The chart below shows a dramatic decline in satisfaction (by 14 points) as the number of channels increases (from one to four).** This indicates that channel efficiency may be linked to overall satisfaction. Overall performance was also lower among businesses seeking informational/advisory services (e.g., to solve a problem/correct an error). Given that one of the key areas for improving the Client Satisfaction Index score is Issue Resolution, the implication for service managers is clear. **In order to enhance the service experience for clients and resolve any issues easily, every effort should be made to reduce the number of channels used.**

Figure 5



“What one thing could governments do to improve the service experience?”

The TCOB4 survey asked businesses to provide suggestions for improving the overall service experience. Among respondents who answered this open-ended question, 31% said that no improvements or changes were needed, indicating that government efforts to improve the service experience is working for some businesses. **13% of respondents would prefer to have more direct telephone contact, while 10% indicated that services available through government websites should be streamlined for easier navigation.** Another 9% reported that a faster response to inquiries and reduced wait times would improve the service experience.

Table 7

Comment	%
Nothing, the service needs no improvements or changes	31%
Live agent / No machines / Human response / More direct telephone contact	13%
Streamlined website / Easier to navigate website / Easier to find information / User Friendly / Make internet available	10%
Timely response / Speedier service / Faster response time for inquiries / Reduce wait times	9%
Knowledgeable staff / Informed staff / Responsible staff / Accountable staff	6%
Better communication skills / Other comments about English/French or other language barriers	5%
Reduce the amount of paperwork / Reduce red tape / Clarify regulations	6%
Increase awareness of services / Advertising of services / Notifications / Call to verify / Call to confirm	5%
Reduce fees / Don't charge so much / Keep costs down / Reduce penalties	1%
Coordination between departments / Streamline departments / Share information between different levels of government	1%
Closer location / More Kiosks / Better hours / Face to face contact / In-person visits	1%
Other mentions not related to question (e.g., reduce taxes, general comments about government)	11%

n=3,619

National Trends: Key Findings

Many Canadian businesses continue to feel that their overall service experience could be improved. The national average score for overall satisfaction with a recent service experience has declined marginally (64.1 in 2010 vs. 63.4 in 2013). However, the Best in Class score has decreased by nearly 3 points. **Overall satisfaction levels were:**

- **Slightly higher for interactions with provincial governments;**
- **Significantly lower when two or more channels are used (decline of 14 points as the number of channels increased from 1 to 4); and**
- **Highest for the website channel and lowest for telephone. These two channels were not only used most often for all types of services, but were also most preferred among businesses.**

Respondent comments have identified the following areas as “the one thing government could do to improve the service experience”:

- **Timely response to inquiries** (e.g., speedier service, reduced wait times)
- **More “human” response to inquiries** (e.g., live agent with more direct telephone contact)
- **A better website** (e.g., streamlined, easier to navigate, easier to find information)

SECTION 4: TCOB4 PERFORMANCE MEASURES

The fourth wave of TCOB was designed to capture the degree to which businesses were satisfied with their service interaction and the factors that contributed to higher satisfaction levels. The CSat Index is a multi-dimensional outcome measure of client service and includes the satisfaction measure “Overall, I was satisfied with the service I received”. The TCOB4 performance measures consist of five CSat Sub-Indices, each of which includes a set of attributes regarding different aspects of the service experience:

- **Issue Resolution** explores how problems and complaints are addressed.
- **Delivery Timeliness** explores the amount of time it takes to get access and receive the service.
- **Service Design** explores the actual process of accessing and receiving a service.
- **Staff Interaction** explores staff qualities (e.g., knowledge, courtesy, fairness, etc.) in the in-person and telephone channels.
- **Channel Satisfaction** explores the overall personal experience in the context of the primary method used to receive a service.

Average scores for these measures are detailed by service-to-business category in the sub-sections below. Where possible, Best in Class results are also included to provide a target for performance among lower ranking jurisdictions.

How do the service-to-business categories measure up?

In the TCOB4 survey, businesses were asked to recall a recent service interaction that took place in the past six months. The service experience was examined by the following categories: Finance, Tax, Legal, Property, Plant and Equipment, Environment, Transportation, Customer and Marketplace, Human Resources, and Health and Safety. These categories are groupings of services that fall under similar service departments or functions (refer to Section 2). **In terms of overall satisfaction, services related to Health and Safety and Human Resources continued to be the strongest performers, while services in the Legal and Property, Plant and Equipment categories were the weakest performers.**

Table 8

Service-to-Business Category	TCOB4	TCOB3	Best in Class
All	63.4	64.1	65.6
Health and Safety	66.3	65.5	79.4
Human Resources	64.5	68.4	73.1
Tax	63.9	63.6	68.0
Finance	63.3	n/a	72.0
Transportation	62.5	63.5	75.0
Customer and Marketplace	61.6	62.0	77.3
Environment	60.6	59.9	78.6
Legal	60.3	62.7	70.2
Property, Plant and Equipment	58.0	64.6	76.3

The top three performing service-to-business categories were Health and Safety, Human Resources and Tax (highest for Health and Safety). The service categories with the lowest performance in overall satisfaction and the CSat Index include Property, Plant and Equipment, Legal and Environment. This is primarily due to lower performance on the aspects of the service experience that drive client satisfaction, namely Issue Resolution, Delivery Timeliness and Service Design.

Table 9

Service-to-Business Category	Overall Sat	CSat Index	Driver Scores				
			Service Design	Delivery Timeliness	Staff Interaction	Issue Resolution	Channel Satisfaction
All	63.4	58.7	69.9	63.9	72.7	64.2	70.7
Finance	63.3	59.3	69.7	63.0	73.2	64.4	71.1
Tax	63.9	59.0	71.0	65.0	71.5	64.9	71.6
Legal	60.3	54.7	67.4	60.0	71.8	60.3	65.7
Property, Plant and Equipment	58.0	53.8	69.7	61.8	70.8	61.7	68.0
Environment	60.6	56.2	66.8	61.1	75.2	62.0	69.8
Transportation	62.5	58.4	72.4	61.3	77.2	65.6	69.0
Customer and Marketplace	61.6	56.7	67.0	61.2	70.6	62.2	65.9
Human Resources	64.5	58.8	70.3	63.2	79.6	66.6	70.9
Health and Safety	66.3	62.3	72.9	69.9	76.1	68.1	74.3

How do the service-to-business types measure up?

The table below indicates that overall satisfaction is relatively stable across different service types. Although Transactional and Regulatory services performed slightly better than Informational and Non-regulatory services, these differences were not statistically significant.

Table 10

Service Type	TCOB4	Best in Class
Transactional	64.0	66.6
Informational/Advisory	62.5	64.8
Regulatory	63.7	67.7
Non-Regulatory	63.3	64.4

Performance in overall satisfaction and the CSat Index did not vary significantly across the service-to-business types. However, Transactional and Regulatory services performed slightly better in Service Design, Delivery Timeliness and Channel Satisfaction than Informational and Non-regulatory services.

Table 11

	Overall Sat	CSat Index	Driver Scores				
			Service	Delivery	Staff	Issue	Channel
All	63.4	58.7	69.9	63.9	72.7	64.2	70.7
Transactional	64.0	59.4	71.2	65.4	73.2	65.2	71.8
Informational/	62.5	57.5	69.0	61.2	75.5	64.4	68.2
Regulatory	63.7	59.0	71.1	64.9	73.6	64.9	71.3
Non-Regulatory	63.3	58.5	69.5	62.9	74.3	65.1	69.7

TCOB4 Performance Measures: Key Findings

Highest CSat Index scores were achieved by the following categories of services: Health and Safety, Tax, and Human Resources (primarily transactional and regulatory services).

Weaker CSat Index performance was noted for the following categories of services: Property, Plant and Equipment, Legal, and Environment.

There is minimal variation by service type, although transactional and regulatory services performed slightly stronger than informational and non-regulatory services.

SECTION 5: A RECENT SERVICE EXPERIENCE

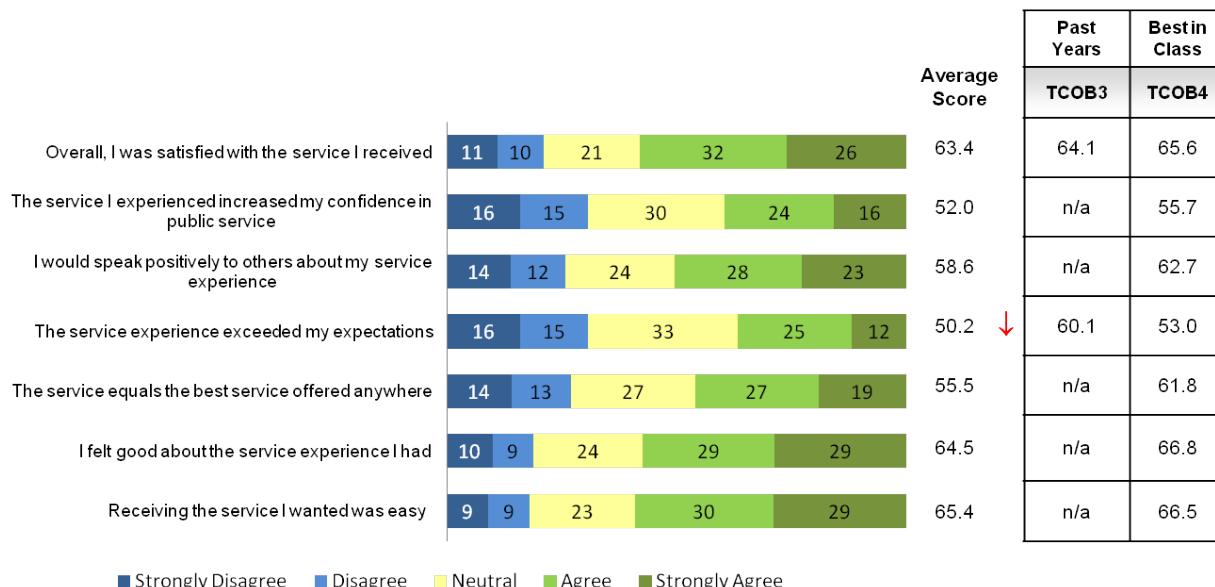
In the TCOB4 survey, respondents described their most recent service experience in considerable detail. They answered a series of questions about the ease of access, timeliness with service delivery, how issues or complaints were addressed, interaction with staff, and other related issues. Satisfaction with these groups of attributes was used to analyze the elements of good service, where governments are performing well, and which areas need improvement.

How do we measure client satisfaction?

TCOB4 measured overall client satisfaction using a multi-item composite known as the Client Satisfaction (CSat) Index. The CSat Index is comprised of seven 'component' questions, based on the ICCS Client Satisfaction Model. These questions ranged from the client's personal experience (e.g., "Overall, I was satisfied with the service I experienced") to the broader cultural environment in which service provision took place (e.g., "The service equals the best service anywhere").

The TCOB4 CSat Index score was 58.7. At the national level, the highest scoring items were "receiving the service I wanted was easy" and "I felt good about the service experience I had". The average score for the overall satisfaction measure (i.e., "Overall I was satisfied with the service I received") was 63.4, which is nearly on par with TCOB3 (64.1).

Figure 6



↑↓ Denotes statistically significant change (at 95% confidence level).

n/a = Score not available for previous waves.

n = 4,284 (Overall, I was satisfied with the service I received)

The three lowest scoring items were comparative and reputational measures related to the societal context of the service experience. Given that the societal context may be susceptible to external events, activities and experiences that are not directly under the control of service managers, these measures typically rate lower than satisfaction with the individual's personal experience (discussed further in Section 10). Assessing the performance of governments against other private and public sector organizations, 46% of businesses agreed or strongly agreed that the service they experienced was the best offered anywhere. In addition, 40% of respondents agreed or strongly agreed that the service experience increased their confidence in public service. Finally, when held to a standard above and beyond satisfying clients, only 37% of respondents agreed or strongly agreed that the service experience exceeded their expectations.

Among the two CSat Index items that could be trended, the average score for “The service exceeded my expectations” dropped the most (nearly 10 points lower than TCOB3), while “Overall, I was satisfied with the service I received” slipped by only 0.7 points. This result confirms that exceeding clients’ expectations is becoming more challenging for governments today than achieving ‘mere’ satisfaction.

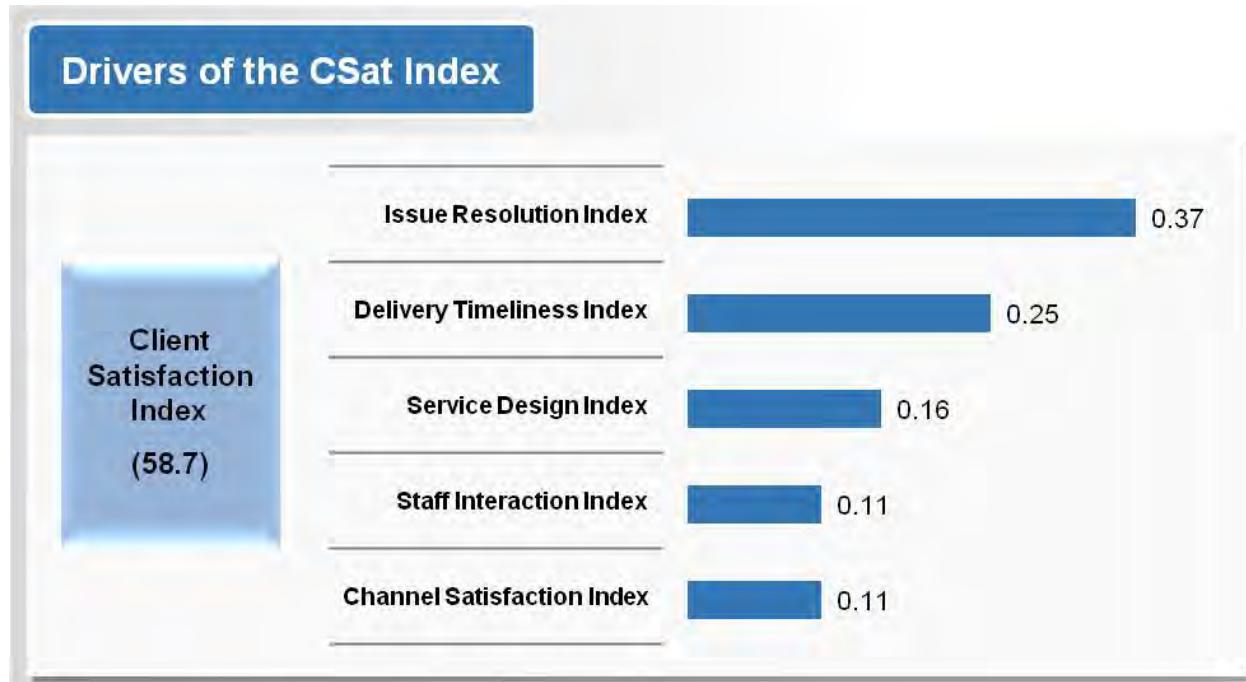
What makes a good service experience?

In order to determine the factors contributing to higher client satisfaction (measured by the CSat Index), TCOB4 examined various attributes of the service experience. These attributes were grouped into the following CSat Sub-Indices:

- **Issue Resolution** explores how problems and complaints are addressed;
- **Delivery Timeliness** explores the amount of time it takes to get access and receive the service;
- **Service Design** explores the actual process of accessing and receiving a service;
- **Staff Interaction** explores staff qualities (e.g., knowledge, courtesy, fairness, etc.) in the in-person and telephone channels; and
- **Channel Satisfaction** explores the overall personal experience in the context of the primary method used to receive a service.

The CSat Sub-Index composite scores were detailed earlier in Section 4, page 24 (TCOB4 Performance Measures). To develop a broad picture of what makes a good service experience, these factors were treated as independent variables against overall client satisfaction (CSat Index). **According to TCOB4 results, the two strongest predictors of overall client satisfaction were Issue Resolution and Delivery Timeliness.** The Service Design Index of attributes was third most influential, while Channel Satisfaction and Staff Interaction were tied for the weakest impact on overall client satisfaction.

Figure 7



Adjusted $R^2 = 0.86$ (stepwise). Standardized β coefficients for each CSat Sub-Index as well as overall performance in the CSat Index are shown above. The β coefficient is a measure of the strength of a predictor's relative impact in the CSat Index. Higher β values indicate relatively stronger influence on the dependent variable (the 7-measure Client Satisfaction Index). The adjusted R^2 (coefficient of determination) indicates the certainty with which predictions can be made using a model; 86% of the variance in the CSat Index for all services can be predicted using this model.

In order to gain a more detailed understanding of the recent service experience, the component attributes of each CSat Sub-Index were also treated as independent variables against overall client satisfaction (CSat Index). Ranked below are questions that exhibited the strongest impact relative to other attributes in their corresponding Sub-Indices. **Based on TCOB4 results, improvements in the areas of Issue Resolution and Delivery Timeliness are likely to have the greatest impact on business satisfaction.**

It should be noted that timeliness with service delivery ("I was satisfied with the amount of time it took to receive the service") was the strongest driver in both TCOB3 and Citizen First 6 research. Even though a new analytical approach was used for TCOB4, **this attribute continues to be an important factor for delivering government services to both citizens and businesses.**

Figure 8



Squared Pearson's Correlation Coefficients (r^2) are shown above for each independent variable, with the 7-measure CSat Index as the dependent variable (pair-wise). r^2 is a measure of how much of the variance in the CSat Index can be accounted for by a predictor. Please note that only attributes with "above average" r^2 values within their corresponding Sub-Index are shown.

Based on the above analysis, specific attributes of the service experience that are likely to have the greatest impact on, or ‘drive’, overall client satisfaction were identified. Service managers should always aim to ‘protect’ high satisfaction scores in areas that exhibit strong influence on overall client satisfaction. **The areas of service delivery that governments should focus on improving are also those with strong impact, but relatively weaker satisfaction levels.** Key drivers with the greatest need for improvement are ranked by importance in the chart below.

The ‘top priority’ for governments across the nation is to improve the speed with which businesses are provided assistance (“I was satisfied with the amount of time it took to get any help I needed”). Although a component of the Delivery Timeliness Index, the broad nature of this question (“...any help I needed”) indicates a possible link to the Issue Resolution Index. Among the attributes that can be tracked to previous waves, those included in the Delivery Timeliness and Issue Resolution Indices were also key drivers in TCOB3.

Service providers need to ensure that the process to get access and receive a government service is easy, so as to not place an unreasonable burden on businesses. These attributes are components of the Service Design Index, which was also a strong predictor of overall client satisfaction.

Another area of improvement is related to whether businesses felt good about their interaction with service staff. The Staff Interaction Index of attributes was a relatively weak predictor of overall client satisfaction. **However, like citizens, businesses do give importance to how interaction with staff makes them ‘feel’.** Service managers should not lose sight of this ‘emotional’ dimension of the personal experience by ensuring that staff understand client needs and make every effort to address them.

Figure 9



The squared Pearson’s Correlation Coefficient (r^2) for each independent variable is shown above, with the 7-measure CSat Index as the dependent variable. Correlation coefficients measure how much of the variance in the CSat Index can be accounted for by a predictor. The attributes shown are those with “above average” r^2 values, but “below average” satisfaction scores within their corresponding Sub-Index.

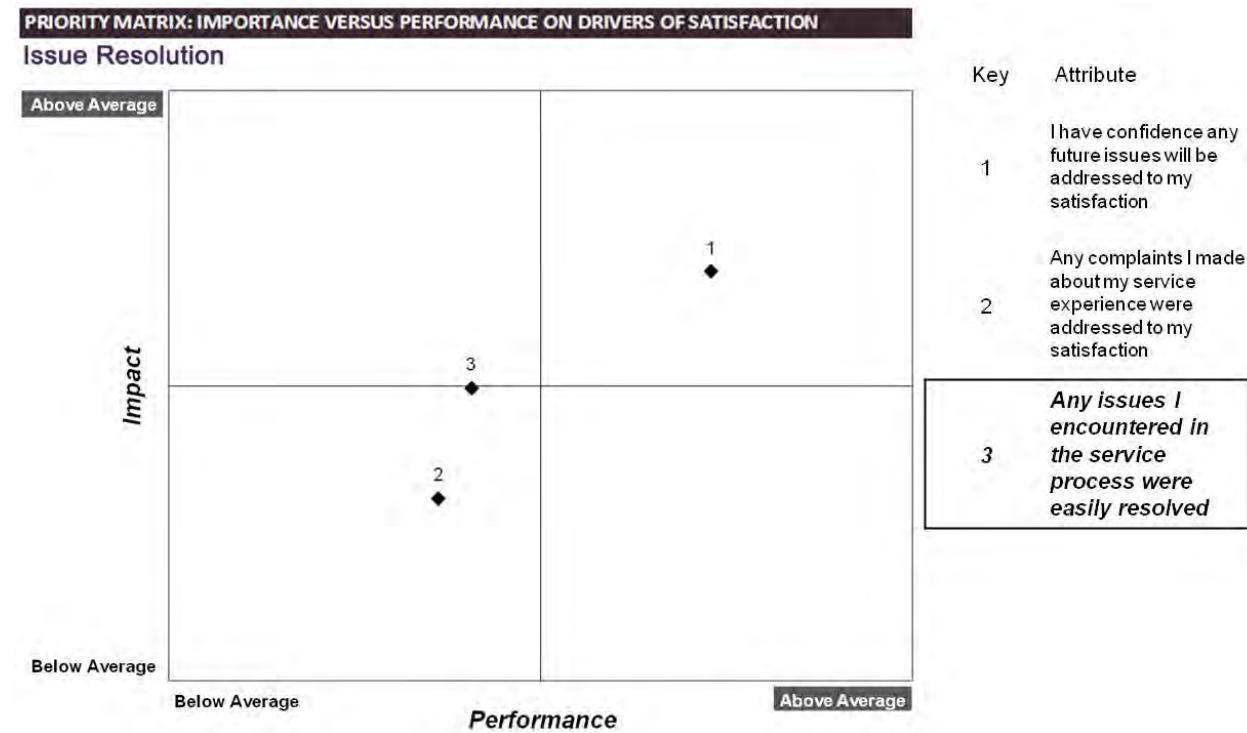
Issue Resolution Index: Are businesses satisfied with how their issues are resolved?

In comparison to other CSat Sub-Indices, **Issue Resolution was the strongest predictor of overall client satisfaction. However, performance on this group of attributes was relatively weaker than other areas of the service experience.**

The three questions comprising the Issue Resolution Index are shown below on a Priority Matrix, which reflects their relative performance (average scores) and impact on the Client Satisfaction Index. As an element of the service experience that is directly under the control of the service provider, **service managers should continue to instil confidence that any future issues will be addressed to businesses' satisfaction.** This can be achieved by ensuring that client issues encountered in the service process are easily resolved and that any complaints made are addressed.

Issue Resolution
examines satisfaction with the way client problems and complaints are addressed. It is a part of the “functionality” dimension of the personal experience.

Figure 10



Each attribute was treated as an independent variable against the CSat Index (dependent variable). “Impact” refers to the strength of the squared Pearson’s correlation coefficient (r^2), and “Performance” refers to the average satisfaction score.

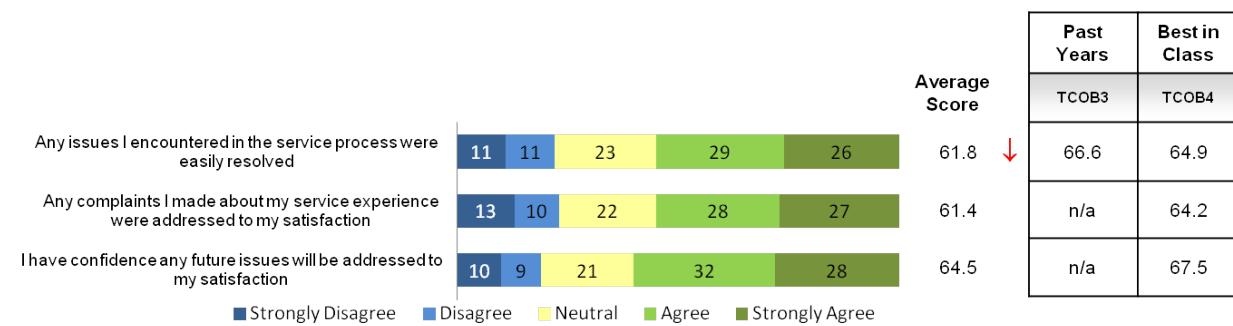
Have governments improved in resolving issues?

Satisfaction with the Issue Resolution Index of attributes was relatively weak across the nation.

Looking more closely at the individual questions that comprise this CSat Sub-Index helps to confirm opportunities to strengthen client satisfaction at the national level. Among the three attributes that comprise the Issue Resolution Index, the one scoring highest was “I have confidence that any future issues will be addressed to my satisfaction” (60% of businesses agreeing/strongly agreeing).

Businesses were less satisfied with the remaining two Issue Resolution attributes, which relate to easy resolution of client issues and how complaints are addressed (55% agree/strongly agree). Satisfaction with issues being easily resolved can also be tracked to the previous wave of TCOB. **Trends show that the average score for this item has declined by nearly 5 points since TCOB3. Given that easy resolution is a borderline area to improve, service managers should focus their efforts on reversing this downward trend.**

Figure 11



What do 'firmographics' say about Issue Resolution?

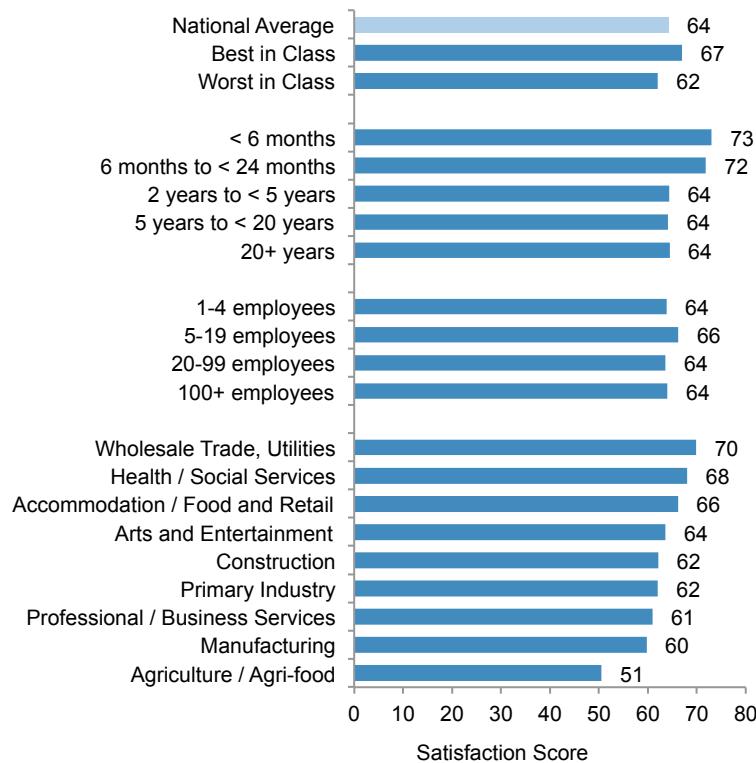
The chart below details performance on the Issue Resolution Index by business size, years in operation, and industry, also known as 'firmographics'. The national average, Best in Class, and Worst in Class scores are also included for comparison.

Businesses operating for less than 2 years were slightly more satisfied with this area of the service experience. As the TCOB4 sample was primarily composed of businesses that have been operating for at least 5 years, the Issue Resolution Index is still important for the majority of Canadian businesses.

Satisfaction levels were consistent across businesses of different sizes. The lack of significant variation by business size is reassuring, because governments cannot change firmographics. This confirms that Issue Resolution should be improved for services relevant to business of all sizes.

Performance on the Issue Resolution Index varies widely by economic sector. The Agriculture/Agri-Food industry reported the weakest satisfaction scores, performing more than 10 points below the Worst in Class score. In contrast, the most satisfied industry (Wholesale Trade, Utilities) performed 3 points stronger than the Best in Class score. **Among the two sectors that comprise the majority (nearly 50%) of Canadian businesses, the Professional/Business Services industry was notably less satisfied (3 points lower than the national average). Satisfaction levels for the Accommodation/Food and Retail industry were slightly stronger than the national average.**

Figure 12



Delivery Timeliness Index: Was the service delivered in a timely manner?

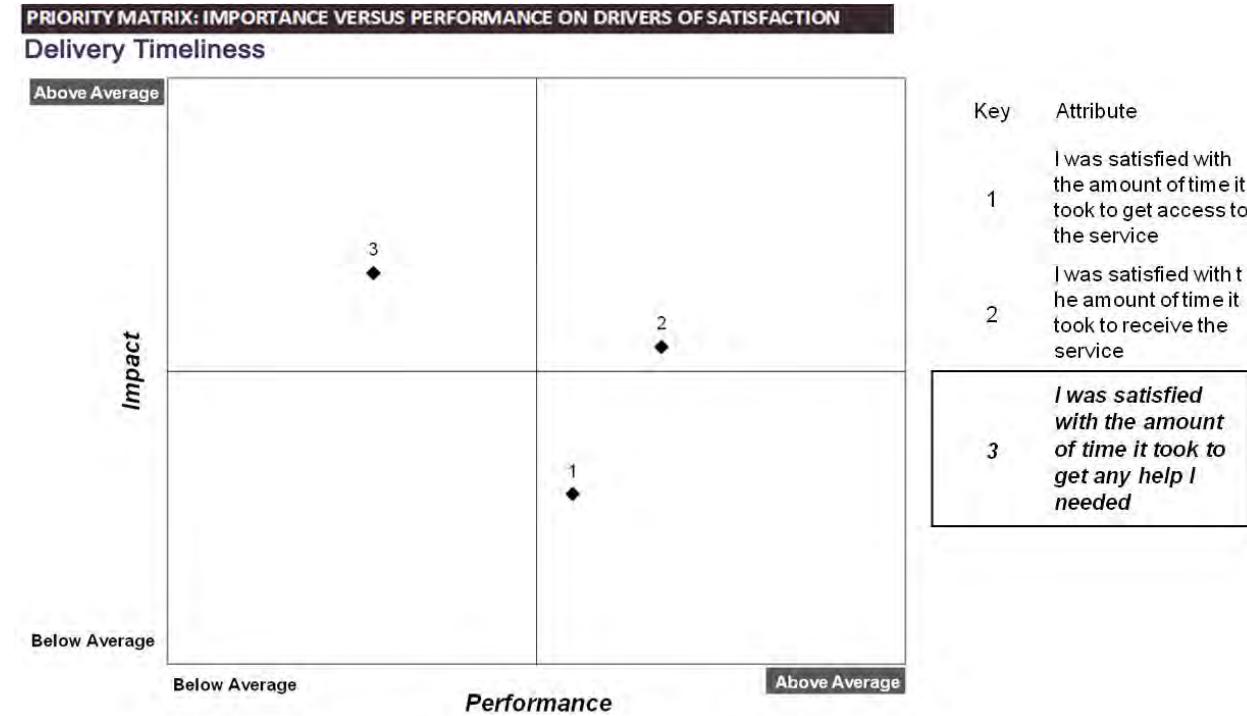
At the national level, Delivery Timeliness was a strong predictor of overall client satisfaction with the service experience. **However, this CSat Sub-Index had the weakest satisfaction score for nearly all jurisdictions.**

The three questions comprising the Delivery Timeliness Index are shown below on a Priority Matrix, which reflects their performance (average scores) and relative influence on the Client Satisfaction Index. Similar to Issue Resolution, Delivery Timeliness is directly under the control of the service provider, making it an actionable area for service managers.

Delivery Timeliness examines satisfaction with the amount of time it takes to get access and receive a government service. This element of the personal experience is directly under the control of service providers.

TCOB4 results indicate that the items strongly impacting overall client satisfaction include **the amount of time it took to get any help needed** and **the amount of time it took to receive the service**. This finding is consistent for all jurisdictions. Interestingly, the latter attribute was also determined as a key driver in TCOB3 and Citizens First research. **Satisfaction levels were particularly weak for the amount of time it took to get any help needed, making it a priority that service managers across the nation should focus on improving.**

Figure 13



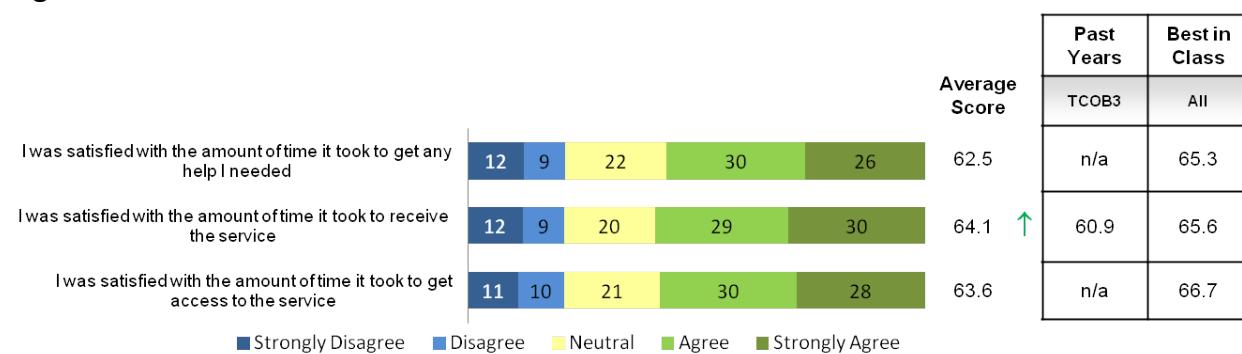
Each attribute was treated as an independent variable against the CSat Index (dependent variable). "Impact" refers to the strength of the squared Pearson's correlation coefficient (r^2), and "Performance" refers to the average satisfaction score.

Have governments improved in timeliness?

In comparison with other CSat Sub-Indices, Delivery Timeliness had the weakest satisfaction score across the nation (just below Issue Resolution). Looking more closely at the individual questions that comprise Delivery Timeliness helps to confirm opportunities to improve the CSat Index at the national level. Satisfaction was strongest for the amount of time it took to receive the service, with 59% of businesses agreeing/strongly agreeing. Businesses were marginally less positive about the remaining two items. The lowest performing attribute was an area to improve for nearly all jurisdictions; **only 56% of respondents agreed/strongly agreed that they were satisfied with the amount of time it took to get any help needed.**

Satisfaction with one of the Delivery Timeliness attributes can also be tracked to the previous wave of TCOB. **Trends show that the average score for the amount of time it took to receive the service has increased significantly (by nearly 3 points).** The national average for this attribute is only 2 points away from the Best in Class score, indicating a possible 'ceiling' associated with how quickly a service can be delivered through traditional methods. **As such, governments should consider improving the current upward trend by reducing red tape and encouraging self-service options (see Section 8).**

Figure 14



n/a = Score not available for previous waves.

↑ Denotes statistically significant change (at 95% confidence level).

n = 3,924 (I was satisfied with the amount of time it took to get any help I needed).

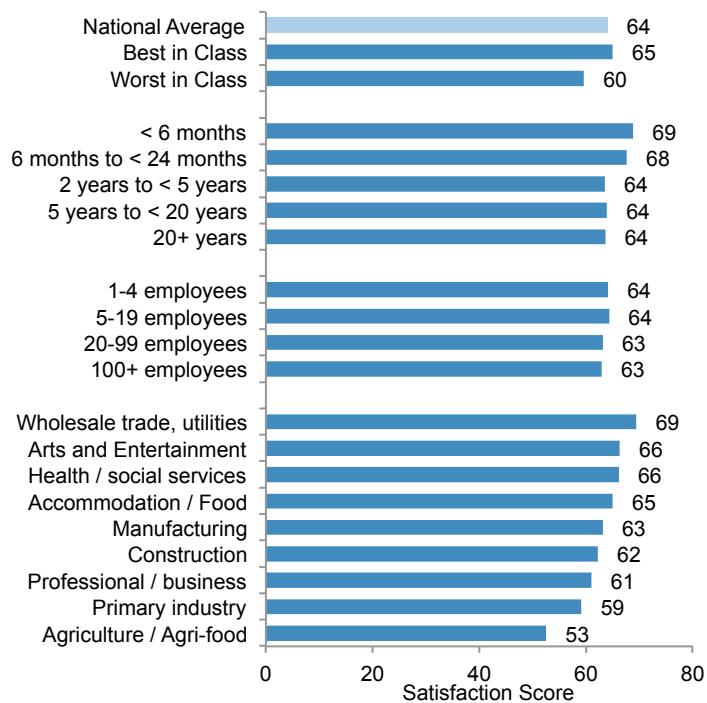
What do 'firmographics' say about Delivery Timeliness?

The chart below details performance on the Delivery Timeliness Index by business size, years in operation, and industry, also known as 'firmographics'. **Businesses operating for less than 2 years were slightly more satisfied with the Delivery Timeliness Index of attributes.** Newer businesses were more likely to receive transactional and regulatory services (e.g., filing taxes, registration, etc.), which also performed stronger in Delivery Timeliness. As the Canadian business community is primarily composed of businesses that have been operating for at least 5 years, these higher satisfaction levels in Delivery Timeliness may be linked to differences in the types of services being utilized by newer businesses.

Satisfaction levels were steady across businesses of different sizes. The lack of significant variation is reassuring. While the number of years a business has been in operation will increase over time, business size may not necessarily change. This indicates that the need for prioritizing Delivery Timeliness (and Issue Resolution) is a broader issue that is consistent across business firmographics.

Performance on the Delivery Timeliness Index varied widely by economic sector. The Agriculture/Agri-Food industry was least satisfied, performing 7 points below the Worst in Class score. In contrast, the most satisfied industry (Wholesale Trade, Utilities) performed 4 points stronger than the Best in Class score. **Among the two sectors that comprise the majority (nearly 50%) of Canadian businesses, the Professional/ Business Services industry was notably less satisfied (3 points lower than the national average). Satisfaction levels for the Accommodation/Food and Retail industry were marginally stronger than the national average.**

Figure 15



Service Design Index: How easy was it to get the service?

Following Issue Resolution and Delivery Timeliness, the Service Design Index was another strong predictor of overall client satisfaction.

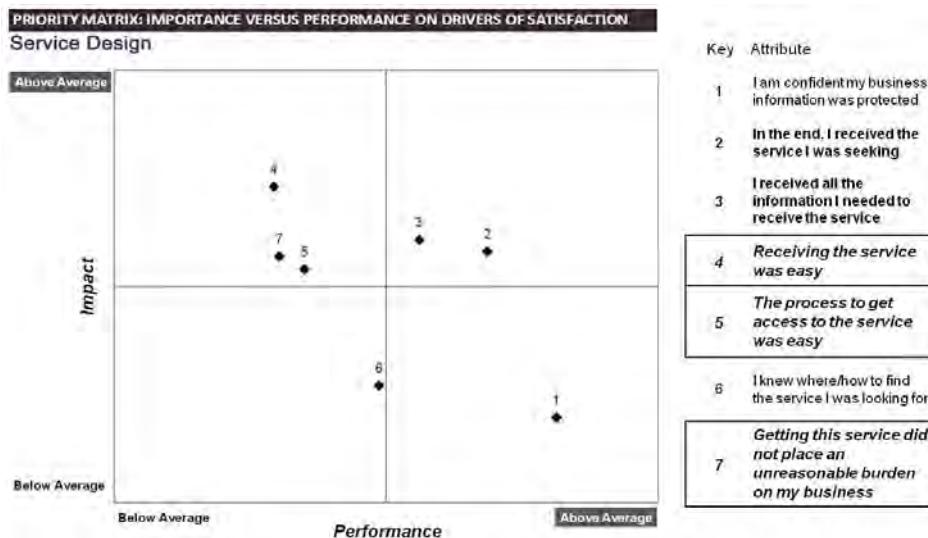
Performance on Service Design was also relatively strong. Governments should be encouraged by this finding, which is consistent across most jurisdictions.

The seven questions comprising the Service Design Index are shown below on a Priority Matrix, which reflects their performance (average scores) and relative influence on the Client Satisfaction Index. Service managers should aim to 'protect' high satisfaction scores for attributes that also have strong impact on overall client satisfaction, such as "I received all the information I needed to receive the service" and "In the end, I received the service I was seeking". **In order to continue improving in Service Design, the 'top priorities' for service managers include ensuring that the process to access and receive a service is easy.** The amount of burden placed on a business was another key driver needing improvement and may be linked to red tape and regulatory issues (see Section 8).

Service Design examines satisfaction with the actual process of accessing and receiving a service. It also reflects the "functional" dimension of the overall personal experience.

Canadian businesses appeared to be fairly confident with regards to information protection (both performance and impact on overall satisfaction are lower than average). In contrast, Citizen First 6 reported a 14 point decrease in overall satisfaction scores for citizens experiencing a problem related to privacy or security of their personal information. Government entities providing both citizen and business services should keep these differing opinions in mind, particularly when implementing changes or improvements to Service Design.

Figure 16



Each attribute was treated as an independent variable against the CSat Index (dependent variable). "Impact" refers to the strength of the squared Pearson's correlation coefficient (r^2), and "Performance" refers to the average satisfaction score.

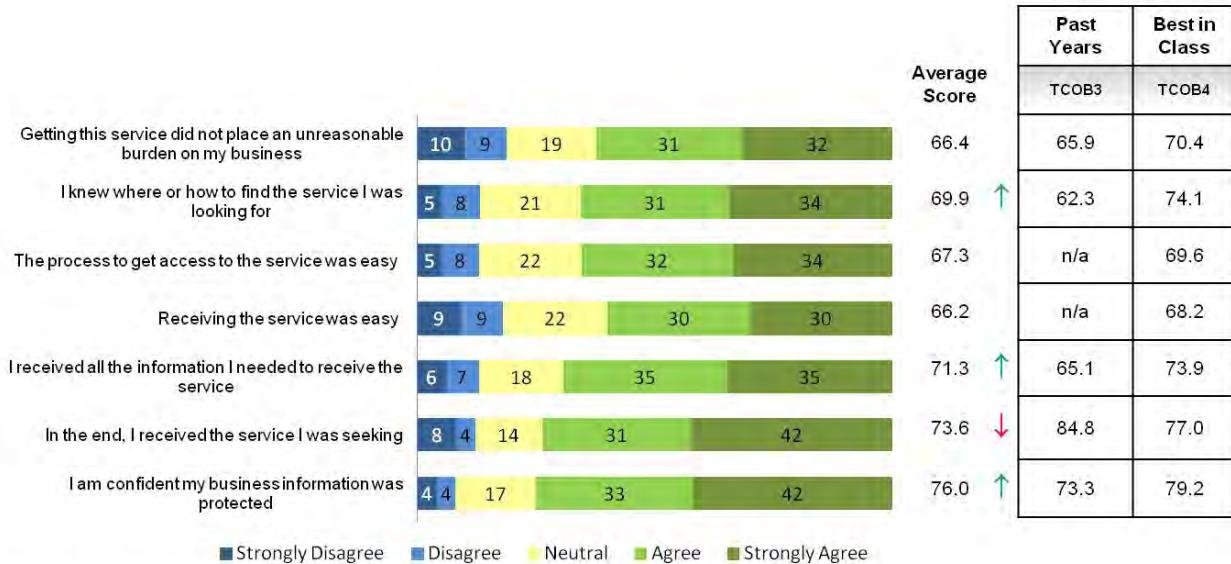
Have governments improved Service Design?

In comparison with other CSat Sub-Indices, performance on Service Design was strong at the national level. Looking more closely at the individual questions that comprise the Service Design Index helps to confirm opportunities to strengthen the CSat Index at the national level. Among the seven questions that comprise the Service Design index, the two rated lowest in TCOB4 were “Receiving the service was easy” (60% agreeing/strongly agreeing) and “Getting this service did not place an unreasonable burden on my business” (63% agreeing/strongly agreeing).

Satisfaction with five of the seven items in the Service Design Index can be tracked to previous waves. Interestingly, **3 out of 4 businesses reported being confident (agreed or strongly agreed)** that their information was protected; a top performing attribute that has improved significantly over the past 3 years. **Government efforts to improve information provision (“I knew where or how to find the service I was looking for”)** also show signs of success; the average score for this attribute increased by more than 7 points.

Satisfaction levels remained stable for businesses experiencing an ‘unreasonable burden’ when getting a service. Although fewer businesses felt that they received the service they were seeking (drop of 10 points), the average score for this attribute was relatively high. Due to the strong impact of this outcome on overall client satisfaction, governments are encouraged to reverse this downward trend.

Figure 17



n/a = Score not available for previous waves.

↑ Denotes statistically significant change (at 95% confidence level).

n = 4,239 (Getting this service did not place an unreasonable burden on my business).

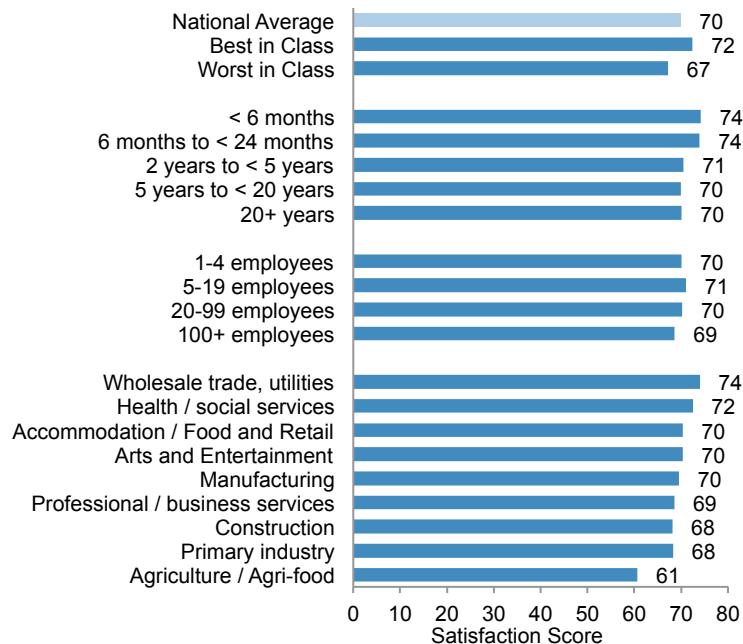
What do 'firmographics' say about Service Design?

The chart below details performance in the Service Design Index by business size and years in operation, also known as 'firmographics'. The national average, Best in Class, and Worst in Class scores are also included for comparison.

Businesses operating for less than 2 years were slightly more satisfied with the Service Design Index of attributes. Newer businesses were more likely to receive transactional and regulatory services (e.g., filing taxes, registration, etc.), which also performed stronger on the Service Design Index. As the Canadian business community is primarily composed of businesses that have been operating for at least 5 years, these higher satisfaction levels for Service Design may be linked to differences in the types of services being utilized by newer businesses. **Satisfaction levels were steady across businesses of different sizes.** The lack of significant variation is reassuring, because governments cannot change business firmographics. This confirms that strong satisfaction with Service Design is consistent among the majority of Canadian businesses.

Performance on the Service Design Index does not vary widely by economic sector. Similar to Issue Resolution and Delivery Timeliness, the Agriculture/Agri-Food industry reported the weakest satisfaction scores (performing 6 points below the Worst in Class score), while Wholesale Trade, Utilities performed strongest (4 points higher than the Best in Class score). **The two sectors that comprise the majority (nearly 50%) of Canadian businesses (Professional/Business Services and Accommodation/Food and Retail) were almost on par with the national average.**

Figure 18



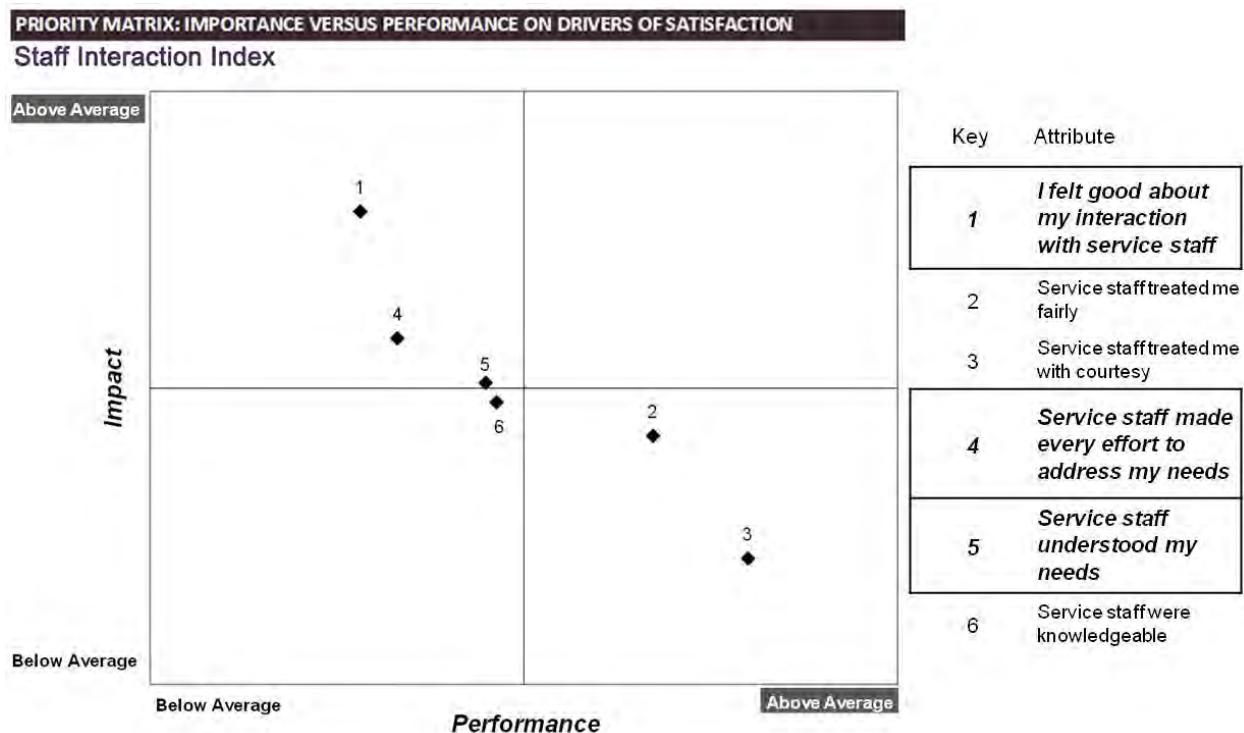
Staff Interaction Index: How did businesses feel about their interaction with staff?

Compared to other CSat Sub-Indices, the Staff Interaction Index of attributes was a weak predictor of overall client satisfaction. However, like citizens, businesses do give importance to how interaction with staff makes them 'feel'. This is evidenced by the strong impact of one specific Staff attribute, "I felt good about my interaction with service staff". Service managers should not lose sight of this 'emotional' dimension of the personal experience and continue improving their strong performance.

The six questions comprising the Staff Interaction Index are shown below on a Priority Matrix, which reflects their performance (average scores) and relative influence on the Client Satisfaction Index. TCOB4 results indicate that the attributes with relatively higher impact on client satisfaction performed weaker than the attributes of lower impact. **To maintain their strong performance on Staff Interaction, service managers should ensure that clients feel good about their interaction. This may be achieved by demonstrating a good understanding of business needs and that every effort will be made to address them.**

Staff Interaction examines satisfaction with staff qualities (e.g., knowledge, courtesy, fairness, etc.) as experienced in the in-person and telephone channels. It reflects the 'emotional' dimension of the overall personal experience.

Figure 19



Each attribute was treated as an independent variable against the CSat Index (dependent variable). "Impact" refers to the strength of the squared Pearson's correlation coefficient (r^2), and "Performance" refers to the average satisfaction score.

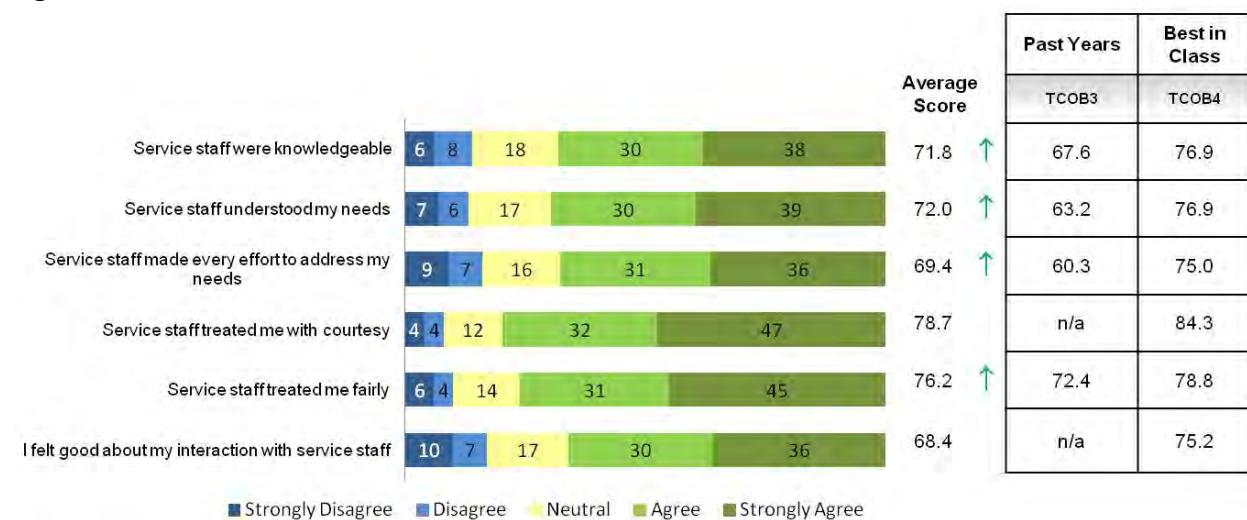
Have governments improved in Staff Interaction?

In comparison to other CSat Sub-Indices, the composite score for the Staff Interaction Index was high. Looking more closely at the individual questions that comprise Staff Interaction helps to confirm opportunities to strengthen the CSat Index at the national level. **Of the six questions that comprise the Staff Interaction Index, the two rated lowest in TCOB4 were “Service staff made every effort to address my needs” (67% agreeing/strongly agreeing) and “I felt good about my interaction with service staff” (66% agreeing/strongly agreeing).**

Satisfaction with four of the six items in the Staff Interaction Index can be tracked with TCOB3 results. **Trends show that the average score for all four attributes have improved significantly over the past 3 years.** The sharpest increase in performance occurred for “Service staff understood my needs” and “Service staff made every effort to address my needs”.

While service providers should be recognized for this progress, there is room further improvement. **The current upward trend may be accelerated if service managers shift their focus to ensure that clients feel good about their interaction with staff. For the majority of jurisdictions, this may be accomplished by not only understanding client needs, but also demonstrating that every effort was made to address them.**

Figure 20



n/a = Score not available for previous waves.

↑ Denotes statistically significant change (at 95% confidence level).

n = 1,915 (Service staff were knowledgeable)

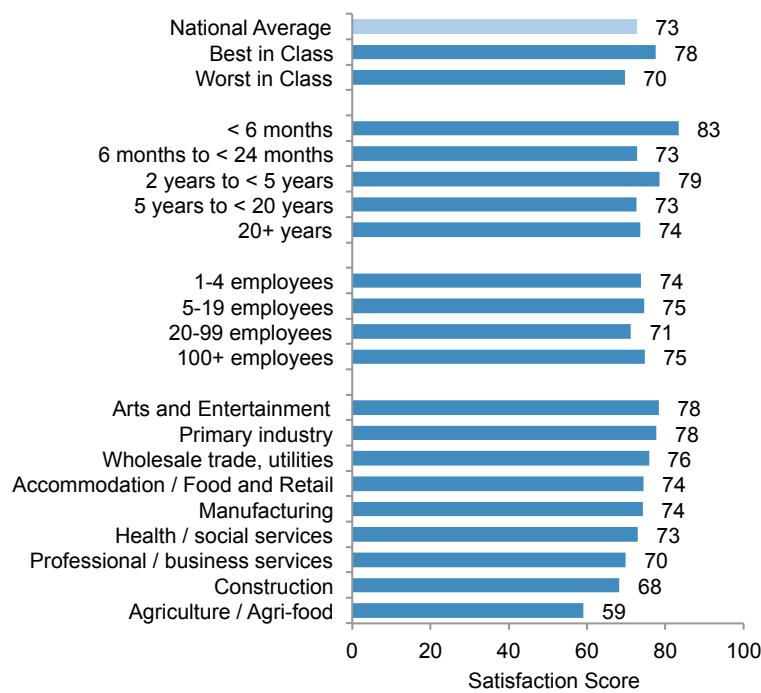
What do 'firmographics' say about Staff Interaction?

The chart below details performance in the Staff Interaction Index by business size and years in operation, also known as 'firmographics'. The national average, Best in Class, and Worst in Class scores are also included for comparison.

Businesses operating for 2 to 5 years and less than 6 months were more satisfied with the Staff Interaction Index of attributes. Newer businesses were more likely to receive transactional and regulatory services (e.g., filing taxes, registration, etc.), which performed slightly stronger in the Staff Interaction Index. As the Canadian business community is primarily composed of businesses that have been operating for at least 5 years, these higher satisfaction levels in Staff Interaction may be linked to differences in the types of services being utilized by newer businesses. **Satisfaction in Staff Interaction was stable across businesses of different sizes.** The lack of significant variation is noteworthy, because governments cannot change business firmographics. This confirms that relatively strong satisfaction in Staff Interaction is consistent among the majority of Canadian businesses.

Performance on the Staff Interaction Index varies widely by economic sector. Similar to the other CSat Sub-Indices, Agriculture/Agri-Food industry was least satisfied, performing 11 points below the Worst in Class score. The most satisfied industry (Arts and Entertainment) performed on par with the Best in Class score. **Among the two sectors that comprise the majority (nearly 50%) of Canadian businesses, the Professional/ Business Services industry was notably less satisfied (3 points lower than the national average). Satisfaction levels for the Accommodation/Food and Retail industry were marginally stronger than the national average.**

Figure 21



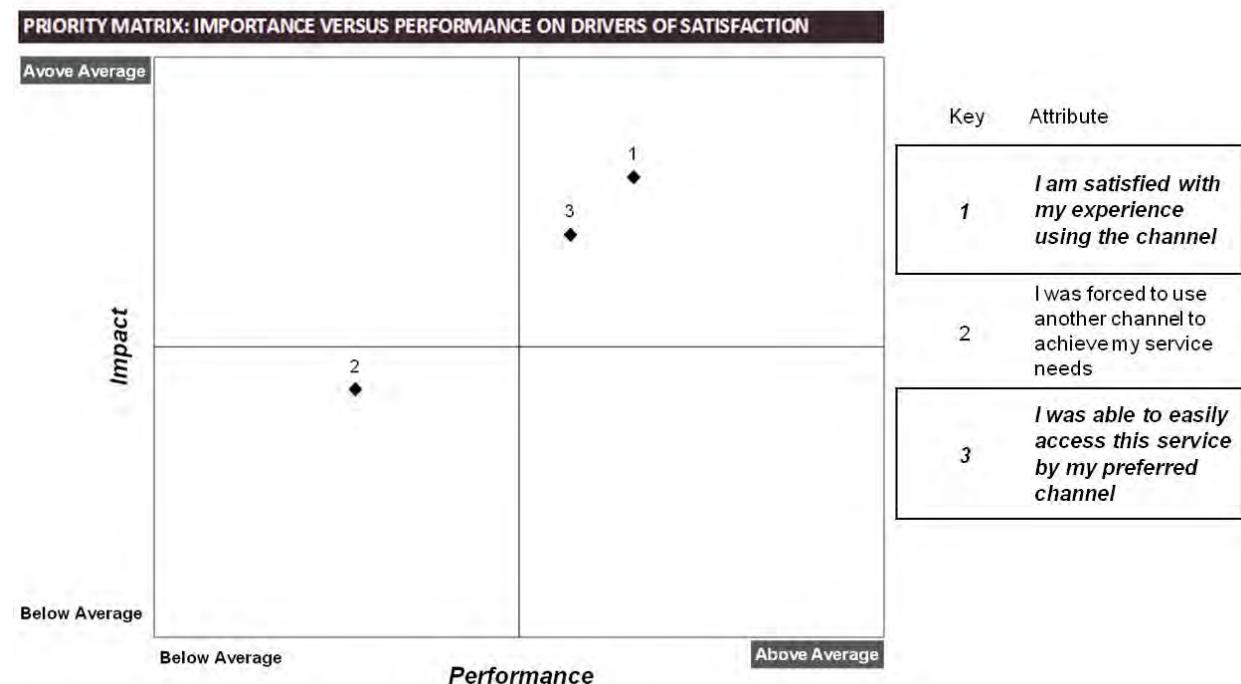
Channel Satisfaction Index: How satisfied were businesses with their channel experience?

As a CSat Sub-Index, Channel was tied with Staff Interaction as a relatively weak predictor of overall client satisfaction. However, when compared with other specific service attributes, businesses did give some importance to satisfaction with the channel experience. Service managers should not lose sight of this 'functional' dimension of the personal experience and maintain their strong performance.

Channel Satisfaction
examines the overall personal experience in the context of the primary method used to access a service.

The three questions related to Channel Satisfaction are shown below on a Priority Matrix, which reflects their performance (average scores) and relative influence on the Client Satisfaction Index. Users of all service channels answered these questions, including those who used the telephone, website, and in-person channels. TCOB4 results indicate that the attributes with stronger impact on client satisfaction performed relatively higher than the attributes of weaker impact. **Service managers should keep up their good work by continuing to ensure that clients are satisfied with their channel experience and that they can easily access the service by their preferred channel.**

Figure 22



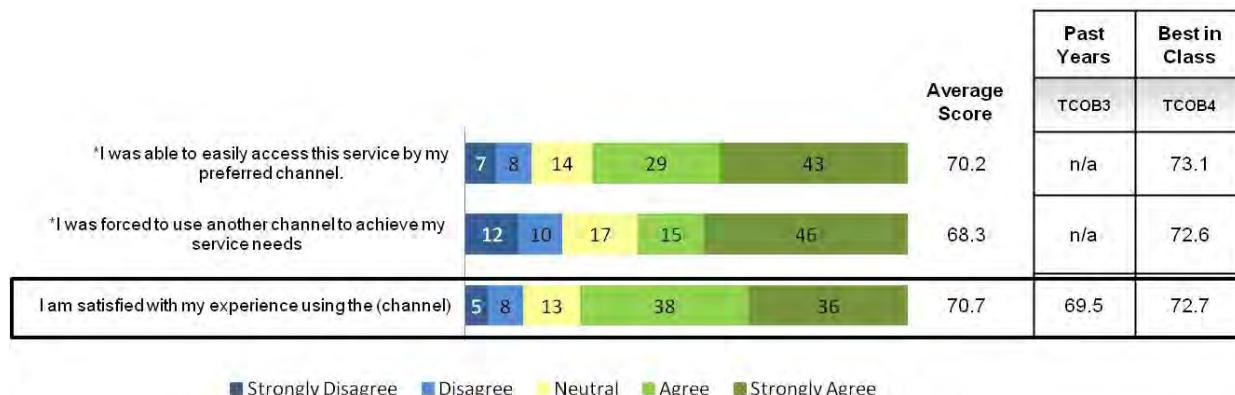
Each attribute was treated as an independent variable against the CSat Index (dependent variable). "Impact" refers to the strength of the squared Pearson's correlation coefficient (r^2), and "Performance" refers to the average satisfaction score.

Have governments improved in Channel Satisfaction?

In comparison with other CSat Sub-Indices, performance in Channel Satisfaction was among the strongest at the national level. Looking more closely at the individual questions related to Channel Satisfaction helps to confirm opportunities to strengthen the CSat Index at the national level. **In comparison to other channel attributes, “I was forced to use another channel to achieve my service needs” performed weakest, while “I was satisfied with my experience using the channel” performed strongest.** TCOB4 results also show that the majority of respondents were able to easily access services by their preferred channel (72% agreeing/strongly agreeing).

Satisfaction with the channel experience can be tracked to TCOB3. **Trends show that the average score for this measure has improved slightly (by 1.2 points) at the national level.**

Figure 23



*Please note that due to relatively low impact of these attributes, “I am satisfied with my experience using the channel” was used in determining the influence of Channel on the Client Satisfaction Index. For more information, please contact the ICCS.

The rating scale for “I was forced to use another channel to achieve my service needs” has been reversed.

n/a = Score not available for previous waves.

↑↓ Denotes statistically significant change (at 95% confidence level).

n = 4,294 (I am satisfied with my experience using the channel).

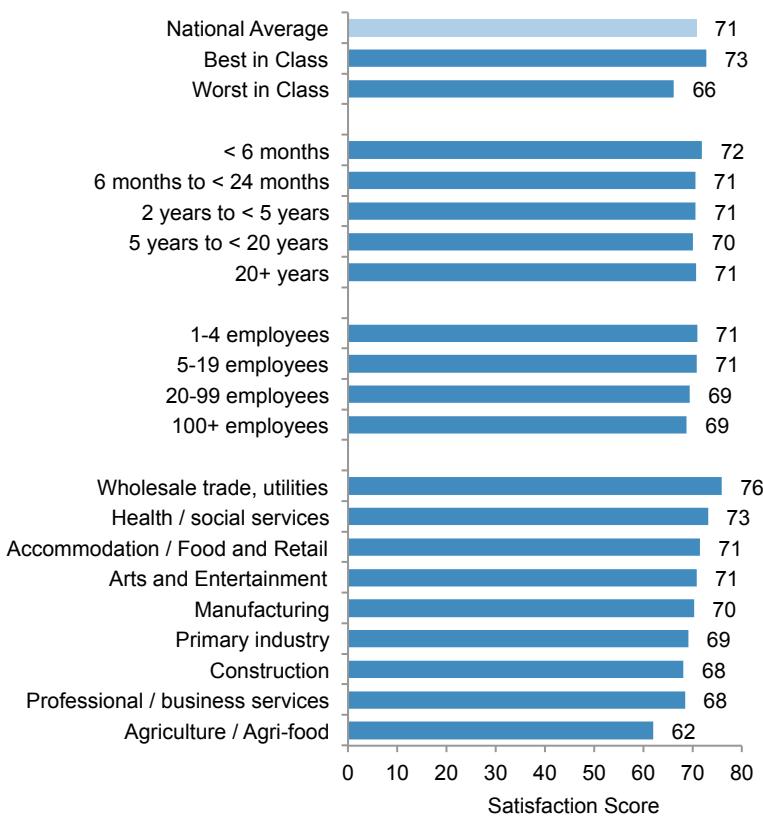
What do 'firmographics' say about channel satisfaction?

The chart below details performance in Channel Satisfaction by business size and years in operation, also known as 'firmographics'. The national average, Best in Class, and Worst in Class scores are also included for comparison.

Satisfaction with the channel experience was fairly stable across years in operation and business size. Businesses with more than 20 employees were marginally less satisfied than smaller businesses. The lack of significant variation is noteworthy because it implies that the channel experience is a lower priority, regardless of businesses firmographics.

Performance on the Delivery Timeliness Index varies by economic sector. The Agriculture/Agri-Food industry was least satisfied, performing 4 points below the Worst in Class score. In contrast, the most satisfied industry (Wholesale Trade, Utilities) performed 3 points stronger than the Best in Class score. **Among the two sectors that comprise the majority (nearly 50%) of Canadian businesses, the Professional/ Business Services industry was notably less satisfied (3 points lower than the national average). Satisfaction levels for the Accommodation/Food and Retail industry were on par with the national average.**

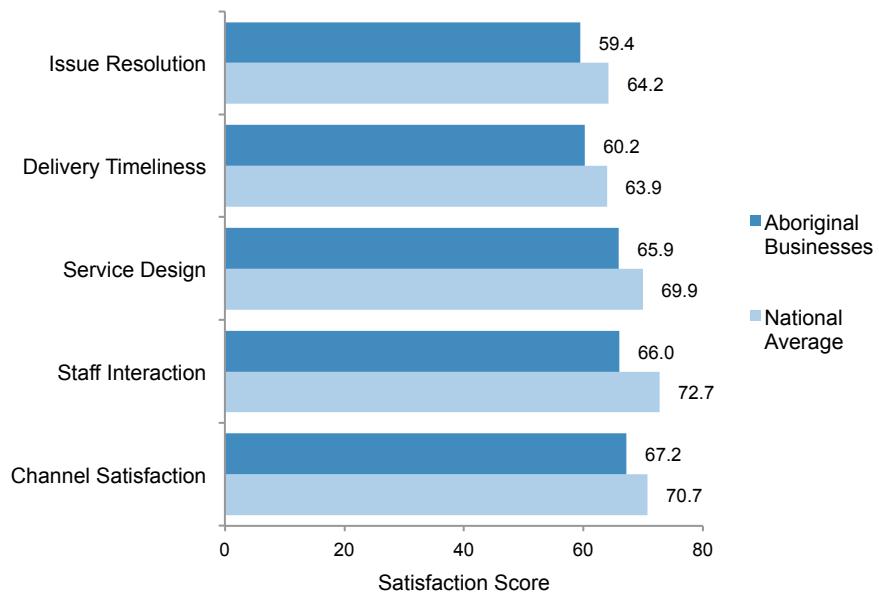
Figure 24



How do Aboriginal businesses feel about their recent service experience?

The chart below indicates that satisfaction levels for **Aboriginal businesses were consistently lower than that of the average Canadian business**. First Nations governments also underperformed on the overall satisfaction component (“Overall, I was satisfied with the service I received”) of the Client Satisfaction Index. As such, regions with higher proportions of Aboriginal businesses should dedicate more resources to improving the service experience for this respondent group. Particular emphasis should be placed on the CSat Sub-Indices that are the strongest predictors of overall client satisfaction, but show relatively weak performance. Similar to national level results, these areas were Issue Resolution and Delivery Timeliness.

Figure 25



A Recent Service Experience: Key Findings

What's confirmed?

The TCOB4 Client Satisfaction (CSat) Index score was 58.7. Among the two CSat Index items that can be trended, the average score for “The service exceeded my expectations” dropped the most (nearly 10 points lower than TCOB3), while “Overall, I was satisfied with the service I received” slipped by only 0.7 points. This result confirms that **exceeding clients’ expectations is becoming more challenging for governments today than achieving ‘mere’ satisfaction.**

The areas of the service experience (CSat Sub-Indices) that have relatively high impact on client satisfaction but low satisfaction scores were **Issue Resolution and Delivery Timeliness**. Among the attributes that can be tracked to previous waves, those included in the Delivery Timeliness and Issue Resolution Indices were also key drivers in TCOB3. The following are specific attributes within these areas that need improvement:

- **Any issues I encountered in the service process were easily resolved (Issue Resolution)**
- **I was satisfied with the amount of time required to get any help needed (Delivery Timeliness)**

What's new?

Service Design was another key element of the service experience. **Satisfaction with this CSat Sub-Index is relatively stronger than Issue Resolution and Delivery Timeliness**. To continue improving, governments should focus their efforts on **ensuring that the process to get access and receive the service is easy**. Satisfaction levels can also be improved by ensuring that getting a service does not place an unreasonable burden on businesses (see Section 8 to learn more on red tape and regulatory issues).

What's surprising?

Canadian businesses appear to be fairly confident with regards to information protection (both performance and the impact of this attribute on overall satisfaction are relatively low). In contrast, Citizen First 6 reported a 14 point decrease in overall satisfaction scores for citizens experiencing a problem related to privacy or security of their personal information. Government entities providing both citizen and business services should keep these differing opinions in mind, particularly when implementing changes or improvements to Service Design.

Satisfaction levels across all 5 CSat Sub-Indices showed little variation by business size, but were slightly higher among businesses that were in operation for less than 2 years. This may be linked to the type of services received by newer businesses, which tend to be more routine transactions.

Given that the majority of Canadian businesses (>85%) have been in operation for at least 5 years, the areas of focus may not necessarily have to be customised according to these ‘firmographics’.

However, satisfaction scores were weaker across all 5 CSat Sub-Indices for Aboriginal businesses.

This indicates a need for improving the overall service experience for Aboriginal businesses throughout the nation.

SECTION 6: THE CHANNEL EXPERIENCE

This section continues to explore the recent service experience within the context of the channel used. Although results of driver analysis indicated that the channel experience has relatively weaker influence on client satisfaction overall, examining channel usage, preference, and efficiency provides service managers with greater insight into the service experience. Service managers can utilize the information below to minimize cost and enhance satisfaction by directing business clients with specific needs to the most appropriate channel.

Which channels are widely used?

Businesses participating in TCOB4 were asked the following questions regarding channel usage:

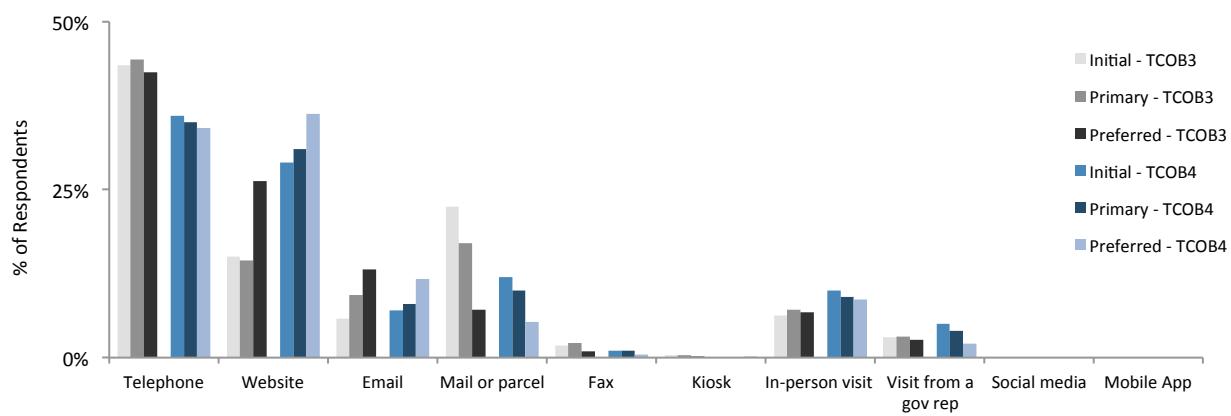
- What was the initial channel or method for accessing this service?
- Of all these various channels for accessing this service, which was the principal or primary one you used?
- If you were to receive this service again, what channel would you prefer to use as the primary means of accessing the service?

The top three channels used to initially access a service continued to be the telephone (36%), website (29%), and mail/parcel service (12%). These methods were also used most often as the primary service channel. In 2010, there was a notable gap between the number of businesses that used a government website as their primary channel and those that would prefer to use website if they were to access the service again. Not surprisingly then, government efforts to move services online have been well received by the business community; **website use has increased dramatically in TCOB4, while telephone and mail/parcel service use has declined.** In addition, the preference to receive government services online has surpassed the telephone for the first time. Potential motivations behind this trend are discussed in Section 7.

Quick Answer

When accessing a recent government service, the majority of businesses used **telephone, website, or posted mail** as both their initial and primary channel. However, more businesses in TCOB4 report preferring the online channel over all other methods.

Figure 26



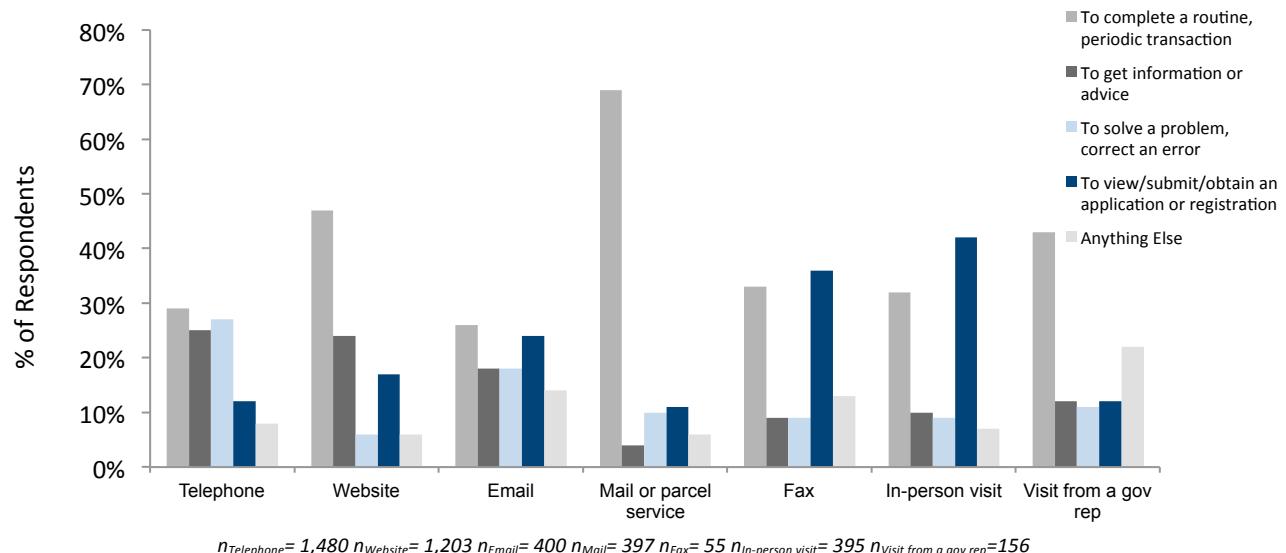
How does the purpose of an interaction vary by channel?

Results from related studies such as Citizens First 6 indicated that the nature of a service interaction is linked to specific channel use. However, certain channels are more clearly suited to delivering a wider range of services than others. For example, when using the email channel, a similar proportion of clients completed routine transactions (26%), sought information or advice (18%), solved a problem (18%), and submitted/obtained an application or registration (24%). In contrast, the primary reason for using mail or parcel service was to complete a routine transaction (69%).

The chart below details the usage of each channel by purpose of interaction. **The telephone channel, e-mail, and to a lesser extent website, were all used for a variety of purposes. When businesses interacted with the government via fax or an in-person visit, they were primarily completing a routine transaction or an application/registration.** Routine transactions also made extensive use of the mail or parcel service and visit from a government representative.

Taking all of the above into account, while certain channels are required for specific types of services, interactions that required more extensive contact (e.g., solving a problem) may begin with one service channel and conclude with another. There may also be an element of channel usage that is (to a varying degree) attributable to business preference, habit, familiarity and awareness of the channel. When examining channel architecture, service managers should consider which channels tend to be best suited for multiple purposes, the associated cost, and what changes might be required to facilitate greater usage (and preference) of those channels.

Figure 27



How does service type vary by channel?

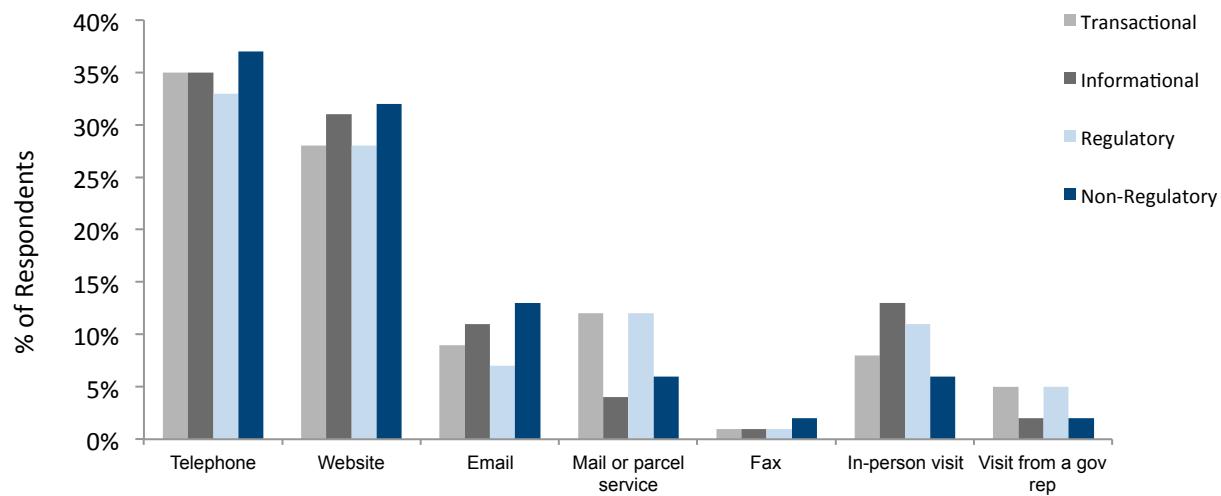
The chart below details the usage of each channel by four service-to-business types. Service types are groupings of services that are delivered in a similar way or have a similar service context. Some types (e.g., informational) are clearly more complex and require more time and effort on the part of the service seeker. As noted in Section 2, this categorization was a first attempt at defining “like” services according to a common set of characteristics, related to the specific service interaction, or the nature of the service itself.

The telephone and government websites were used most frequently for all service-to-business types. This indicates that any future service changes or improvements should be adopted by both methods. Transactional and regulatory services were commonly sought via posted mail, while non-regulatory services were often accessed via e-mail. When businesses interacted with the government to receive informational services, they also tended to use e-mail or conduct in-person visits.

Quick Answer

The telephone and website channels are used to access all service-to-business types. Non-regulatory services are accessed via e-mail more often than other channels, while regulatory and transactional services are commonly accessed via posted mail. The in-person channel is also used often for informational services.

Figure 28



$n_{\text{Transactional}} = 2,680$ $n_{\text{Informational}} = 1,208$ $n_{\text{Regulatory}} = 2,498$ $n_{\text{non-regulatory}} = 1,570$

Which channels are more efficient?

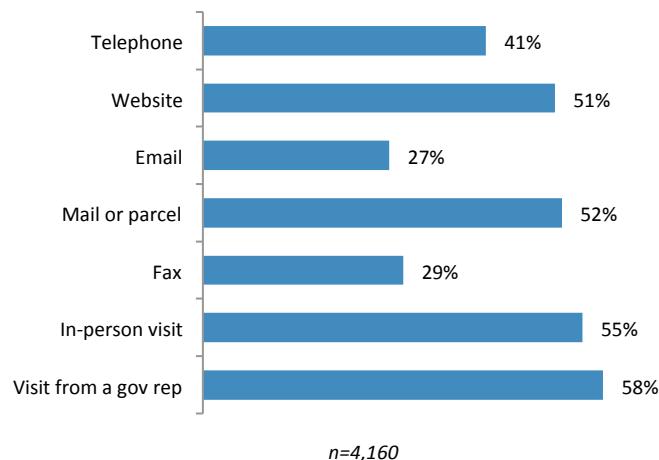
Similar to findings detailed in Citizens First 6, there was a rapid decline in overall satisfaction for businesses using multiple channels. Satisfaction scores for businesses using four channels to access a service were 14 points lower than those businesses using a single channel. In exploring the channel experience, it is therefore important to take a closer look at those who were able to achieve their service needs using only one channel.

Previous iterations of TCOB have traditionally asked questions around how easy it was for the user to access the service they needed and whether options or next steps were explained. In TCOB4, we introduced the concept of channel efficiency, which is essentially a “success rate” for each channel. Efficiency was calculated by taking the number of single channel users for each channel and dividing by the total number of users that began their service interaction with this channel.

This analysis shows that **in-person channels (visit from a government representative, followed by in-person visit to a government office) were the most efficient at delivering a service**. Mail or parcel service and the website method also performed relatively well, followed by telephone. The channels deemed least efficient were email (27%) and fax (29%), as many businesses were not able to achieve all of their service needs using only these methods.

It should be noted that the nature of the service interaction can play a role in the channel accessed and the number of channels required. **The most widely used channels for businesses (telephone and website) were fairly efficient in service delivery. In comparison to Citizens First results, the website channel appeared to be more efficient for businesses (51%) than citizens (38%). This analysis also highlights the strength of traditional channels, such as mail and visit from a government representative, and indicates that the e-mail method may be underutilized by businesses.** Given that many businesses using email often need to solve a problem, service managers may be able to improve performance in Issue Resolution (a priority area to improve overall client satisfaction) by focusing on the efficiency of this particular channel.

Figure 29



Quick Answer

The in-person channels (visit from a government representative and visit to a government office) are most efficient, while email and fax are least efficient.

The Channel Experience: Key Findings

Relative to other aspects of the service experience, channel satisfaction had weak influence on client satisfaction overall. However, the insight gained from examining channel usage, preference, and efficiency can allow service managers to minimize cost and enhance satisfaction by matching appropriate channel use to specific needs:

The top 3 channels used to access services continued to be the telephone, website, and mail/parcel service.

Government efforts to move services online seem to be well received among the business community; **website use has increased dramatically in TCOB4, while telephone and mail or parcel use has declined.** Business preference for government websites also surpassed the telephone for the first time.

The telephone channel, e-mail, and to a lesser extent website, were all used for a variety of purposes. When businesses interacted with the government via fax or an in-person visit, they were primarily completing a routine transaction or application/registration.

Channel efficiency takes a closer look into those businesses that were able to achieve their service needs using only one channel. **The most widely used channels for businesses (telephone and website) were found to be fairly efficient in service delivery** (41% of telephone users and 52% of website users only needed to use one channel). **This analysis also highlights the strength of traditional channels, such as mail and both in-person channels, and indicates that the e-mail method may be underutilized by businesses.**

SECTION 7: GOVERNMENT SERVICES IN THE DIGITAL WORLD

One of the key findings of the channel experience analysis was that an increasing number of Canadian businesses are seeking government services on the Internet. Relative to prior performance in Citizens First 6, the website channel was more efficient than the telephone. When asked to identify their preferred service channel, more than a third of businesses chose the online method. These results indicate that **as the online channel matures, businesses view government websites as more than just an entry point to service delivery**. To identify opportunities to support the achievement of service transactions through online channels, TCOB4 further explored the motivators and barriers to moving services online, as well as other issues related to self-service options.

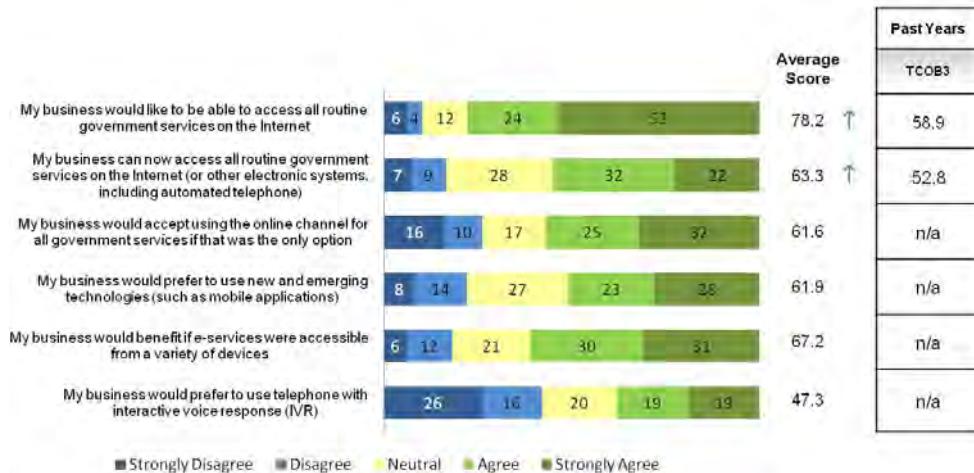
Should governments offer self-service options?

Over the past 3 years, the number of Canadian businesses that can access all routine services on the Internet has increased significantly. **The majority of business clients would not only be interested in online access (77% agree/strongly agree), but would also accept using the online channel if it were the only option (57% agree/strongly agree)**. Many respondents said that accessibility of e-services from a variety of devices (e.g., PC, tablet, mobile phone) would be beneficial, while a slightly lower proportion indicated a specific preference for using emerging technologies (e.g., adoption of 3G networks, new mobile applications, etc.). In contrast, Interactive Voice Response (IVR) was far behind in preference.

Quick Answer

Yes! The majority of Canadian businesses welcome the option of accessing government services on the Internet.

Figure 30



n/a = Score not available for previous waves.

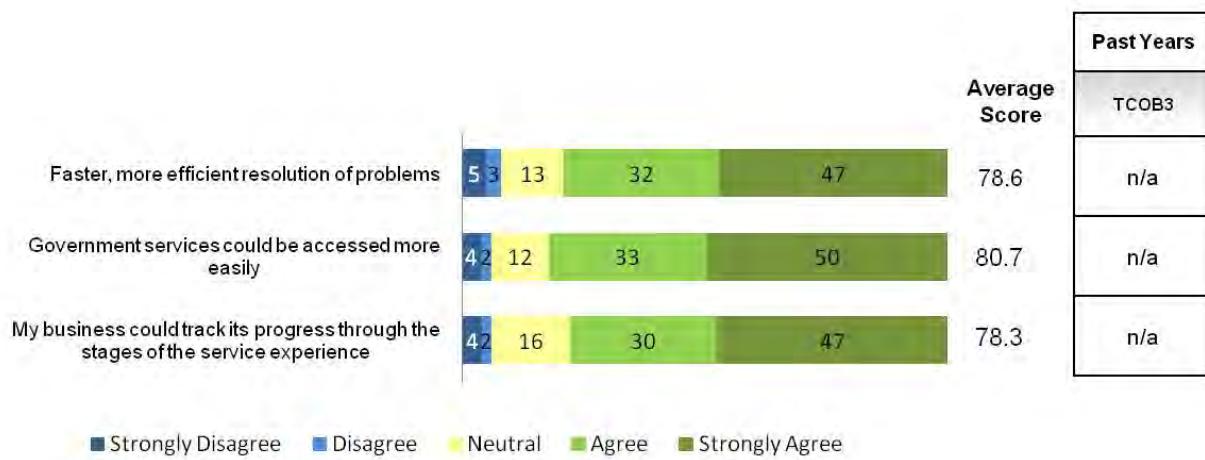
↑ Denotes statistically significant change (at 95% confidence level).

n = 1,927 (My business would like to be able to access all routine government services on the internet).

What motivates businesses to use the online channel?

An overwhelming majority of Canadian businesses (83%) agreed/strongly agreed that they would use digital rather than traditional channels for business purposes if they knew that using them meant easier access to government services. Faster resolution of problems and being able to track progress through the stages of the service experience were marginally weaker motivators. Efficient resolution of problems may be linked to the Issue Resolution Index, which was identified as a priority area for improving client satisfaction overall. Therefore, service managers should not only keep these attributes in mind, but monitor them to ensure that government websites are delivering on the features that motivated digital channel use in the first place.

Figure 31

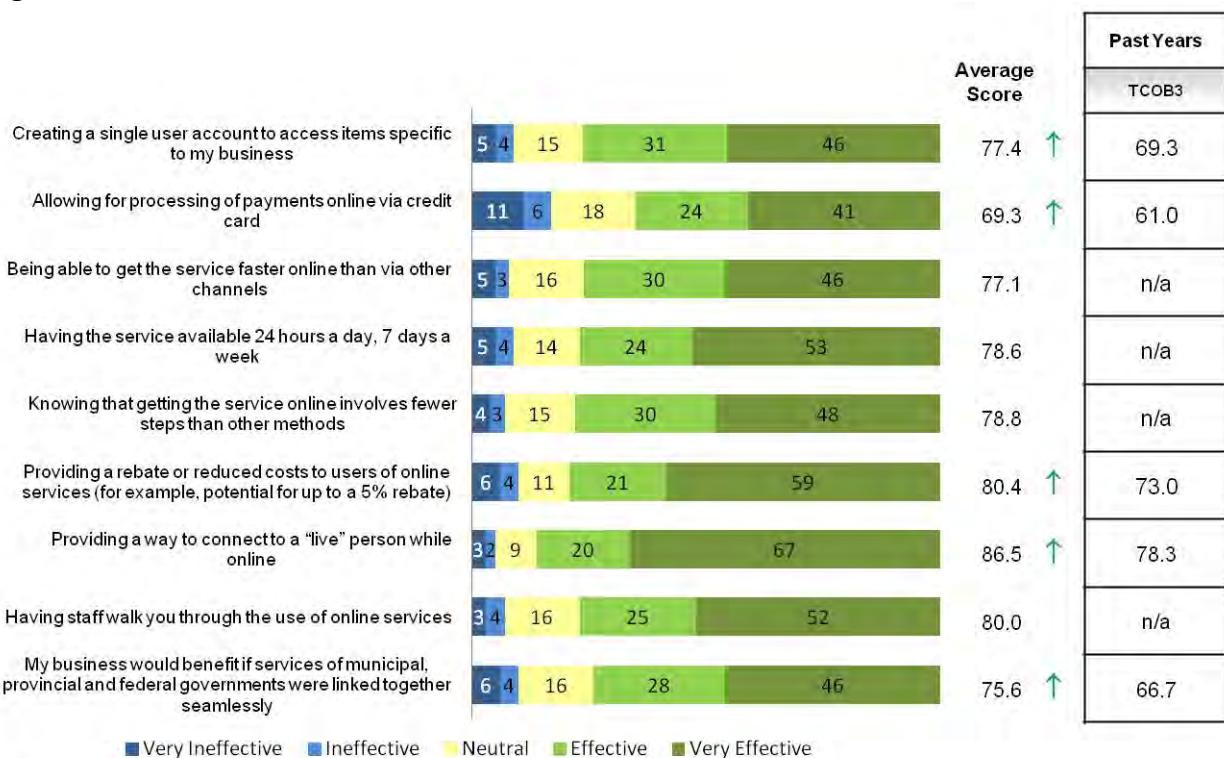


What's the best way to encourage businesses to use government websites?

Among the incentives that could be tracked, the potential effectiveness of all options has risen by more than 5 points since TCOB3. **Providing a way to connect with a 'live' person while online, followed by reduced costs or rebates, continued to be the most effective incentives to encourage online service uptake.** The former option was only slightly stronger than "Having staff walk you through the use of online services," which reinforces the importance of real time support when new online services are rolled out.

Similar to the Citizens First 6 findings, **businesses like the fact that online services would simplify the service access process (i.e., fewer steps and being able to get the service faster online than other methods).** Convenience is another viable way to incentivize the website channel, as many respondents indicated that they are more likely to use online services because the service would be available 24 hours a day, 7 days a week.

Figure 32



n/a = Score not available for previous waves.

↑ Denotes statistically significant change (at 95% confidence level).

n = 2,028 (Creating a single user account to access items specific to my business)

What are the barriers to moving services online?

The citizen (CF6) and business (TCOB4) perspectives are aligned in their concerns with using the Internet to get government services. Both client groups were primarily concerned with privacy and confidentiality when accessing services online. **TCOB4 respondents reported being most concerned with identity theft and privacy of their business information. In addition, the concern for government's ability to validate identity has grown significantly over the last 3 years.** Service providers should develop strategies to effectively address these concerns with the business community.

Quick Answer

There are potential barriers concerning information privacy, specifically **identity theft and government's ability to effectively validate a service user's identity.**

Interestingly, respondents seemed to be less worried about sharing of information between government entities (different departments and/or levels of government). This result is consistent with more businesses reporting that they would benefit if services of municipal, provincial, and federal governments were linked together seamlessly.

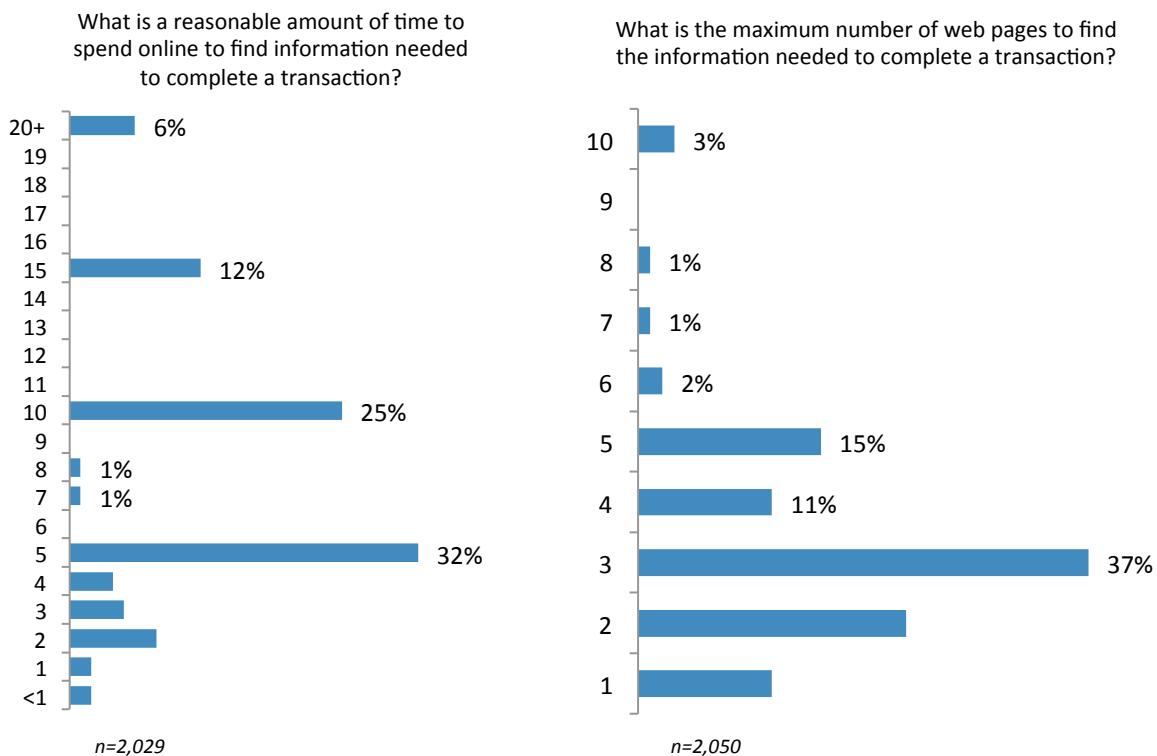
Table 12

Concerns Regarding Using the Internet to Get Government Services	National Average	
	TCOB4	TCOB3
Identity theft (n=2,132)	74.9	n/a
Privacy of your business information (n= 2,135)	76.9	n/a
Sharing of your business information between departments within one level of government (n= 2,109)	62.0	n/a
Sharing of your business information between different levels of government (n= 2,109)	63.2	n/a
Government's ability to effectively validate your identity so that access to your business information is protected (n= 2,116)	73.2	62.4

What do businesses expect of online government services?

The channel use analysis indicated that a growing proportion of the business community is using the Internet to access government services. In their efforts to shift more services online, it is important for service managers to understand business expectations for the website channel. When businesses access government websites, almost 3 out of 4 businesses were prepared to spend a minimum of 5 minutes to find what they are looking for. During this time, 70% of businesses were prepared to navigate at least 3 web pages to find the information they need to complete a transaction. **Service managers should therefore aim to develop government websites that require businesses to spend a minimum of 5 minutes, navigating at least 3 web pages, to find the information needed to complete a transaction.**

Figure 33



Self-Service Options: Key Findings

The business appetite for accessing services online has grown significantly since TCOB3.

Governments can continue to encourage the use of online channels by:

- Providing a way to connect to a live person while online;
- Providing a rebate to users of online services; and
- Ensuring that getting the service online involves fewer steps than other channels.

Service managers should consider strategies to alleviate concerns regarding accessing government services online, which revolve around the protection of business information.

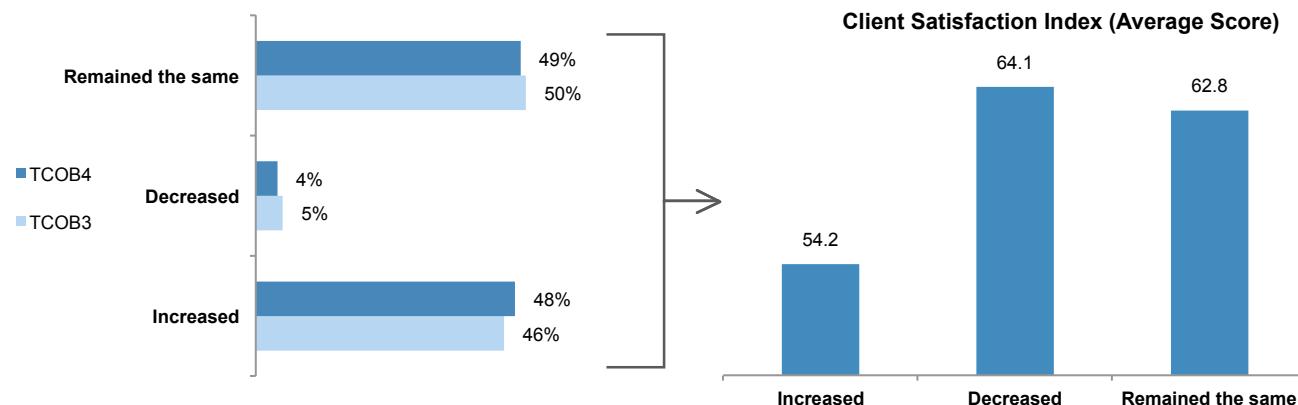
In their efforts to move services online, it is important for service managers to understand business expectations for the website channel. When accessing government websites, **3 out of 4 respondents were prepared to spend at least 5 minutes to find what they are looking for**. During this time, the majority of businesses (70%) were also **prepared to navigate a minimum of 3 web pages** to find the information they need to complete a transaction.

SECTION 8: RED TAPE AND REGULATORY ISSUES

In order to stay current with the evolving service environment, TCOB4 underwent several modifications to capture new information on opportunities for service improvement. Previous research touched on a number of questions that warranted further examination. Many of these questions related to perceptions of government held by businesses with respect to the regulatory or red tape burden associated with service provision, and whether businesses believe they are adequately consulted in the development of new policies that may impact their operations. This section explores these and other issues related to regulatory burden, such as the links between regulation and service satisfaction.

TCOB4 respondents were asked whether they felt that regulatory burden (“red tape”) had increased, decreased or remained the same for their business over the last three years. **For the vast majority of respondents, red tape burden had either increased (48%) or remained the same (49%) since 2010.** What’s the link to service satisfaction? Client Satisfaction Index scores for respondents who reported that regulatory burden had increased were significantly lower than those who indicated that red tape burden had decreased or remained the same.

Figure 34



$n_{TCOB3}=3,894$; $n_{TCOB4}=2,026$

Note that percentages may not sum to 100% due to rounding.

Are governments listening to businesses?

Stakeholder engagement is also considered a factor in the development of business perceptions of government, particularly when new policies and regulations are introduced. Businesses that feel their voice is heard and reflected in policy changes typically hold more positive views of government institutions.

Based on TCOB4 results, the consensus opinion was that **Canadian businesses feel “left out” in the policy and regulatory development process** (average scores lower than 50/100). However, the table below indicates that **over the past 3 years, there have been slight improvements made in all three areas of stakeholder engagement**, from implementing changes with sufficient input from the business community to giving businesses adequate time to assess and respond to potential changes. While the majority of businesses reported that red tape burden either increased or stayed the same over the last 3 years, **there was no consensus opinion on whether the number of regulatory requirements is reasonable**.

This may be explained, in part, by the composition of Canadian business community, which is dominated by small businesses. Regulatory burden is typically more taxing on smaller businesses that have fewer resources available to manage regulatory processes. Nonetheless, **these results provide a strong message for governments regarding the need for broader consultation and engagement in the policy development process**.

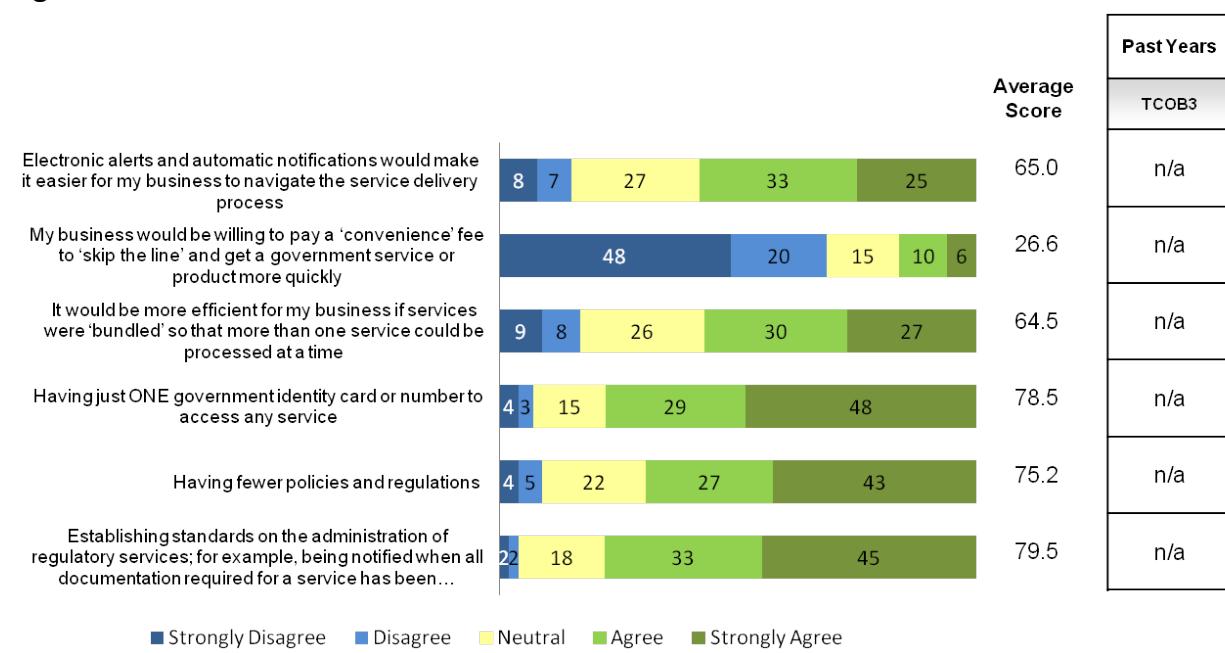
Table 13

Regulatory Reform	National Average	
	TCOB4	TCOB3
Changes were implemented with sufficient input from the business community (n = 1,705)	39.4	36.3
Regulatory changes were accompanied with sufficient information as to how it affected my business (n = 1,775)	42.9	40.0
Businesses were given adequate time to assess and respond to potential changes (n = 1,793)	45.5	42.9
The number of regulatory requirements experienced by my business is reasonable (n = 2,053)	50.9	n/a

How can governments reduce regulatory burden?

In addition to Issue Resolution and Delivery Timeliness, TCOB4 revealed that Service Design also had relatively strong influence on client satisfaction (specifically whether respondents felt that an 'unreasonable burden' was placed on their business). As such, the majority of Canadian businesses (more than 3 out of 4 respondents) felt that **establishing standards on the administration of regulatory services and having just one government ID card** would be more effective in reducing regulatory burden than having fewer policies and regulations. **Business clients were strongly against the payment of a "convenience fee" to get a government service or product more quickly.** A considerable proportion of respondents were also receptive to the options of electronic alerts/automatic notifications (58% agree/strongly agree) and service bundling (57% agree/strongly agree), indicating that there are several viable approaches to red tape reduction.

Figure 35



■ Strongly Disagree ■ Disagree ■ Neutral ■ Agree ■ Strongly Agree

n/a = Score not available for previous waves.

↑ Denotes statistically significant change (at 95% confidence level).

n = 1,986 (Electronic alerts and automatic notifications would make it easier for my business to navigate the service delivery process)

Red Tape and Regulatory Issues: Key Findings

For the vast majority of respondents, **red tape burden has either increased (48%) or remained the same (49%)** since 2010. However, **there was no consensus opinion on whether the number of regulatory requirements is reasonable.**

At the national level, governments appeared to be improving in their efforts to engage the business community in regulatory reforms. The following approaches are recommended to continue this upwards trend:

- Establishing standards on the administration of regulatory services
- Creating one government ID card or number to access any service

The introduction of a “convenience fee” is not recommended, as an overwhelming majority of businesses are not willing to pay to “skip the line” to get a government service or product more quickly.

SECTION 9: INTERNATIONAL COMPARISONS

Business satisfaction with public service delivery is also an important issue for governments in jurisdictions outside of Canada. Similar to the TCOB research series, the Kiwis Count Quarterly Update uses the Citizens First methodology to determine New Zealanders' satisfaction with government services. Respondents during the March 2013 update showed a similar level of satisfaction with "Taxation and Business Services" (64/100) as the Canadian business community (63.9/100).

Although this indicates that tax related services are performing on par with the public service sector in New Zealand, comparisons with other jurisdictions on a wider array of services need to be conducted before broader conclusions can be drawn at the international level.

The Ease of Doing Business Index is one such international measure introduced by the World Bank and the International Finance Corporation. Ranking a total of 185 economies across the globe, this index gauges various regulatory environments in terms of how conducive they are to the starting and operation of a local firm. 10 topic areas comprise the Ease of Doing Business Index, ranging from dealing with construction permits to trading across borders. The table below details the performance of a selected group of OECD countries, for 8 out of the 10 topic areas.

While the Canadian regulatory environment ranked relatively high on the ease of starting a business, resolving insolvency, protecting investors, and paying taxes, it performed weaker in the areas of enforcing contracts, dealing with construction permits and trading across borders. These results concur with overall satisfaction with TCOB4 service-to-business categories (weakest performance for Legal and Property, Plant and Equipment) and increasing regulatory burden.

Table 14

Country	Ease of doing business	Starting a business	Construction	Registering Property	Protecting Investors	Paying Taxes	Trading Across Borders	Enforcing Contracts	Resolving Insolvency
Singapore	1	4	2	36	2	5	1	12	2
Hong Kong	2	6	1	60	3	4	2	10	17
New Zealand	3	1	6	2	1	21	25	17	13
US	4	13	17	25	6	69	22	6	16
Denmark	5	33	8	6	32	13	4	34	10
Norway	6	43	23	7	25	19	21	4	3
UK	7	19	20	73	10	16	14	21	8
Canada	17	3	69	54	4	8	44	62	4
Australia	29	2	11	37	70	48	44	15	18

Note: For each economy, the Ease of Doing Business ranking ranges from 1-185. It is calculated as the simple average of the percentile rankings for each of the 10 topics included in *Doing Business 2013*. For more information, please visit www.doingbusiness.org/rankings.

SECTION 10: PERCEPTIONS OF GOVERNMENT

Before asking businesses to recall perspectives on specific services, the TCOB survey has traditionally included general perception questions. Individual perceptions can be developed based on past experiences with government and/or other information that businesses use when formulating opinions of government service providers. The following sections include a high-level review of the national level findings on the perceived value of government and the overall reputation of government services.

For businesses, what is the value of government?

TCOB4 respondents were asked a series of questions related to the importance of quality service to a healthy business climate and their perceptions of government performance in contributing to successful business operations. **While more Canadian businesses felt that “good service from government is essential to a healthy business climate” and “government policies and regulations contribute to a level playing field,” perceptions of government have otherwise witnessed little change since TCOB3.**

Service managers will also find it useful to examine the change in business perceptions over the last 3 years. In 2013, respondents continued to be less positive in their assessment of governments’ performance. Average scores for those who believed that they get “good value for their tax dollars” and that “governments are open and accountable” were well below 50, suggesting there is substantial room for improvement. Regarding easy access to any government service and access to relevant information for compliance, TCOB4 results were similar to those achieved in 2010, with no significant variations.

Quick Answer

Since 2010, more businesses feel that government policies and regulations contribute to a level playing field in their sector. However, the majority of respondents do not feel that they get “good value for their tax dollars” or that “governments are open and accountable”.

Table 15

Perceptions of Government	National		Best in Class
	TCOB4	TCOB3	TCOB4
Good service from government is essential to a healthy business climate. (n = 4,287)	83.1	81.5	85.4
My business gets good value for its tax dollars. (n = 3,956)	46.7	46.6	54.0
I can easily access any government service that I need for my business. (n = 4,225)	56.0	55.3	57.4
Governments in this country conduct their business in an open and accountable manner. (n = 4,218)	43.5	43.1	49.3
Government policies and regulations contribute to a level playing field for businesses in my industry or sector. (n = 4,071)	46.9	43.6	50.6
I can easily access the information I need to comply with government regulations. (n = 4,273)	59.2	58.3	63.2

Has government service reputation improved?

To learn how businesses feel about government service generally, TCOB4 respondents were asked to rate the services they get from different levels of government, on an overall basis. These ratings can be considered a proxy for “service reputation”.

Receiving excellent scores in service reputation can be challenging for all levels of government, for two reasons. First, reputation often reflects factors that may be susceptible to external events, activities and experiences that are not directly under the control of service managers (e.g., the state of the economy, political issues or events, or the level of business involvement in policy development). Second, good reputation is generally established over a long period time. Because of the external factors often involved, improving service reputation scores can be an even lengthier process.

TCOB4 results indicate that over the last 3 years, government efforts to improve perceptions of public sector services are working. As shown in the table below, Canadian businesses are almost equally satisfied with their provincial/territorial governments as the federal government. **Service reputation scores of the federal and provincial governments have improved by roughly 2 points since TCOB3. The average score for municipal governments has remained fairly stable.**

Table 16

Service Reputation	National		Best in Class
	TCOB4	TCOB3	TCOB4
Services of your provincial or territorial government, e.g. employment standards, business registration, etc. (n =4,179)	59.2	56.2	62.5
Services of the federal government, e.g., Canada Post, Canada Revenue Agency, etc. (n =4,247)	59.1	56.7	63.8
Services of your municipal government, e.g. zoning, property taxes, business licenses, etc. (n =4,137)	58.4	57.6	62.7

Perceptions of Government Service: Key Findings

Since 2010, **more businesses feel that government policies and regulations contribute to a level playing field in their sector**. However, the majority of respondents do not feel that they get “good value for their tax dollars” or that “governments are open and accountable”.

Service reputation scores have increased for both provincial and federal levels of government (by roughly 2 points since TCOB3). This indicates that government efforts to improve perceptions of public sector services are working. The average score for municipal governments has remained fairly stable.

APPENDIX: TCOB4 Survey ©

INTRODUCTION

Hello, my name is _____, and I'm calling from Malatest & Associates on behalf of the Institute for Citizen-Centred Service (ICCS). Could you please direct me to a manager or person responsible for dealing with government services? **[or specific contact name if a callback]**?

Options of specific business functions if more than one general manager:

- 1. Accounting/Finance
- 2. Legal (including permits/licenses)
- 3. Business Development/Operations and/or International Business
- 4. Human Resources
- 5. Manager or owner in charge of most corporate operations

More information if required:

We are conducting a national research study with businesses regarding satisfaction with government services. Your feedback will be used to shape government service delivery over the next several years.

Your organization should have received a letter about this study.

Surveyor Note: Please record name of person you are speaking with: _____

[Programming note: Name of Respondent will need to be recalled for Prize Section, F2.]

Hello, my name is _____, and I'm calling from Malatest & Associates on behalf of the Institute for Citizen-Centred Service (ICCS). We are conducting a national research study with businesses regarding satisfaction with government services. **Those who complete the survey will be entered into a draw to win one Air Canada trip for two to anywhere in North America or one of four cash prizes, each worth \$250.**

If the respondent doesn't think that they qualify:

All businesses interact with the government in some form or another, so your feedback is important whether you utilize government services regularly or only once a year. Services related to tax credits, registration, permits, licenses, and human resources are only a few examples.

More information if required:

The survey should take around 15 minutes to complete, depending on your responses. Your participation is voluntary and all information collected will be used for research purposes only.

May I complete the survey with you now?

- Yes (Continue) Thank you! Please note that this call may be recorded for quality control purposes. The information you provide will be collected in accordance with the Privacy Act and other applicable privacy laws.
- Call back (Schedule time and **Request to send z-mail invite**)
- Refused (Attempt to convert / **Provide online option and request to send z-mail invite** / Go to Purpose of the Study page / Capture reason for refusal)

PURPOSE OF THE STUDY/FURTHER INFORMATION (surveyor to provide information if asked):

We are hoping that you can provide us with information that will help us to provide data to government bodies regarding the quality of the services they provide. The research findings and recommended strategies will be used to guide the development of service delivery to businesses over the next several years.

Confidentiality:

Individual data pertaining to any specific firm will not be published and will be treated as strictly confidential. Data provided by businesses will be used to provide information back in aggregate form only, relative to other businesses in your region/occupation.

Sponsor of the Research:

The Institute for Citizen-Centred Service (ICCS) has retained R.A. Malatest & Associates Ltd. to conduct this research study.

Who should complete it:

Ideally, the survey should be conducted by a contact in one of the four (4) business areas (listed below) who would likely have had contact with various departments to access government services:

- Accounting/Finance
- Legal (including permits/licenses)
- Business Development, Operations, and International Business
- Human Resources

What you will receive:

Participants in this research will help contribute to the improvement of the quality of services offered by government agencies. In addition, you will have a chance to win one Air Canada trip for two to anywhere in North America, or one of four \$250 cash prizes just for participating.

SECTION A: YOUR COMPANY

[Programming note: insert timing for each section of this survey]

The first few questions will tell us a bit about your business.

A1. How long has this business been in operation? (Check only one option)

<input type="radio"/> 1. less than 6 months	<input type="radio"/> 4. 5 years to less than 20 years
<input type="radio"/> 2. 6 months to less than 24 months	<input type="radio"/> 5. 20 years or more
<input type="radio"/> 3. 2 years to less than 5 years	<input type="radio"/> 9. Don't Know/Unsure

A2. Approximately how many employees are in the company?

<input type="radio"/> 1. 1 to 4	<input type="radio"/> 4. 100 or more
<input type="radio"/> 2. 5 to 19	<input type="radio"/> 9. Don't Know/Unsure
<input type="radio"/> 3. 20 to 99	

A3. What areas do **you** oversee in your business? (Please select all that apply)

(Interviewer note: Referring to the respondent's role within their company. If the respondent says they do not oversee any of the operations listed below, thank them and ask to speak with someone who does, then restart the survey.)

[Programming note: these responses are as used in future skip patterns for C1a.]

- 1. Accounting/Finance
- 2. Legal (including permit/licenses)
- 3. Business Development, Operations and/or International Business
- 4. Human Resources
- 5. All of the above
- 99. Don't Know/No Response

A4. Please indicate the major industry sector of your organization by selecting ONE of the following options...

- 1. Accommodation, food and beverage / retail services
- 2. Agriculture / Agri-food
- 3. Construction
- 4. Government services **[thank and terminate]**
- 5. Health / education / social services (excluding government run or public sector)
- 6. Manufacturing
- 7. Primary industry (forestry, logging, fishing, mining, oil & gas, etc.)
- 8. Professional and business services / finance, insurance, real estate (includes accounting, legal, consulting, etc.)
- 9. Wholesale trade / transportation, communications and utilities
- 10. Other _____ *(please specify)*

SECTION B: PERCEPTIONS OF GOVERNMENT

This next section is going to ask you about your perceptions of government and the services you are aware of and/or received.

B1. On a scale from 1 to 5, with 1 being "Strongly Disagree" and 5 being "Strongly Agree", please indicate your level of agreement with the following statements.

Perception of Government	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. Good service from government is essential to a healthy business climate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. My business gets good value for its tax dollars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. I can easily access any government service that I need for my business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Governments in this country conduct their business in an open and accountable manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Government policies and regulations contribute to a level playing field for businesses in my industry or sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. I can easily access the information I need to comply with government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Ontario, City of Toronto and Region of Peel only]

B2.a Do you believe that the voice and needs of business owners/managers with varying ethnic and demographic characteristics are reflected in the services provided by the Ontario government?

- 1. Yes
- 2. No
- 3. Don't Know/Unsure

[Ontario, City of Toronto and Region of Peel only]

B2.b Are the Ontario government services responsive to the needs of a diverse (*Interviewer note: Read if necessary: from varying ethnicities/cultural backgrounds/persons with disabilities, etc.*) business population?

- 1. Yes
- 2. No
- 3. Don't Know/Unsure

B3. We would like you to think about your business' dealing with all levels of government; be it municipal, regional, provincial / territorial and federal. Using a 5-point scale where 1 means "Very Poor" and 5 means "Very Good", please rate the overall quality of service from each level of government. (*Interviewer note: read all examples*)

Service Reputation	Very Poor (1)	(2)	(3)	(4)	Very Good (5)	Not Applicable (7)	Don't Know (9)
a. Services of your provincial or territorial government, e.g. employment standards, business registration, etc.	<input type="radio"/>						
b. Services of the federal government, e.g., Canada Post, Canada Revenue Agency, etc.	<input type="radio"/>						
c. Services of your municipal government, e.g. zoning, property taxes, business licenses, etc.	<input type="radio"/>						
d. [Peel only] Services of the regional government, e.g., water, wastewater/sewer, garbage pickup, regional roads, etc.	<input type="radio"/>						
e. [Toronto only] Infrastructure development supported by your municipal government, e.g. water, wastewater/sewer, garbage pickup, roads, etc.	<input type="radio"/>						

SECTION C: A SERVICE EXPERIENCE IN DETAIL

C1.a Next, we would like to discuss in more detail a specific government service experience. Which of the following types of government services have you had an experience with in the past six months? (Choose all that apply) (*If no service in the past 6 months, think back to within the past year*) (*Interviewer's note: Referring to receiving services from the government, not doing business with the government. Read all of the options as individual yes/no questions.*) **[Programming note: If A3= 5, all of the following options should appear]**

- 1. Finance **[A3=1]**

- 2. Tax **[A3=1]**
- 3. Legal **[A3=2]**
- 4. Property, Plant and Equipment **[A3=2]**
- 5. Environment **[A3=2]**
- 6. Transportation **[A3=2]**
- 7. Customer and marketplace **[A3=3]**
- 8. Human Resources **[A3=4]**
- 9. Health and Safety **[A3=4]**
- 10. **[Toronto only]** Water and Wastewater (sewer & storm) **[A3=2]**

[Programming note: have service definitions 'hover' over service type for ease of reference]

(Interviewer note: provide definitions if needed)

Service	Definition
Finance	Services related to the management of the financial assets and liabilities of the business, e.g. <i>financing, grants, financial advisory, accounting etc.</i>
Tax	Services related to fulfilling the tax obligations of the business, e.g. <i>corporate tax, sales tax, tax credits, tax advisory, etc.</i>
Legal	Services related to the management of the legal entity and other related obligations of the business, e.g. <i>legal structure, dispute resolution, adjudication, registration, authority, government contracting, bidding, tendering, etc.</i>
Property, Plant and Equipment	Services related to the management of the physical and intellectual property of the business, e.g. <i>building permits, zoning, copyright, data storage, leasing, facilities, licences, inspections, public utilities etc.</i>
Environment	Services related to managing and protecting the environment, e.g. <i>pollution, environmental stewardship, environmental assessments, licences, information/advice related to energy efficiency etc.</i>
Transportation	Services related to the management of the movement and delivery of goods and services, e.g. <i>vehicle licensing, parking permits, transportation of hazardous materials, inspections etc.</i>
Customer and Marketplace	Services related to the customers, clients and marketplace, e.g. <i>export markets, import regulations, market research, client information, ombudsman, protecting customer privacy, travel warnings, etc.</i>
Human Resources	Services related to the management of the employees and contractors of the business, e.g. <i>hiring, firing, training, learning and development, Labour laws / employment standards, foreign worker employment, employment insurance, pension plans (CPP, QPP), etc.</i>
Health and Safety	Services related to managing the obligation to protect the health of employees, customers and the public, and deal with workplace hazards, e.g. <i>working compensation, insurance, compliance with safety standards, incident reporting, emergency services etc.</i>
[Toronto only] Water and Wastewater	Services related to the provision of water and collection of wastewater (sewer and storm)

[Programming note: For multiple responses, only the lowest incidence service types, and related specific services, will be shown at C1.b]

C1.b Was the specific nature of your most recent **[Recall C1.a response]** interaction related to...

(Interviewer note: read all of the options, including "other")

1. **[C1.a = 1]** Finance (Select only one from list below)
 - Financing;
 - Grants;
 - Financial advisory;
 - Accounting; or
 - Other (please specify) _____

2. **[C1.a = 2]** Tax (Select only one from list below)
 - Corporate tax;

- Sales tax;
- Tax credits;
- Tax advisory; or
- Other (please specify) _____

3. **[C1.a = 3]** Legal (*Select only one from list below*)

- Legal structure;
- Dispute resolution;
- Adjudication;
- Registration;
- Authority;
- Other (please specify) _____

4. **[C1.a = 4]** Property, Plant and Equipment (*Select only one from list below*)

- Building permits
[Toronto only, in place of Building Permits] Construction-related permits
- [Toronto only]** Development-related Permits;
- Zoning;
- Copyright
- Data storage;
- Leasing;
- Facilities;
- Licences; or
- Other (please specify) _____

5. **[C1a = 5]** Environment (*Select only one from list below*)

- Pollution;
- Environmental stewardship;
- Environmental assessments;
- Licences; or
- Other (please specify) _____

6. **[C1a = 6]** Transportation(*Select only one from list below*)

- Vehicle licensing;
- Parking permits **[Toronto only]** or other vehicle-related permits;
- Transportation of hazardous materials; or
- Other (please specify) _____

7. **[C1a = 7]** Customer and Marketplace (*Select only one from list below*)

- Export markets;
- Import regulations;
- Market research;
- Client information;
- Ombudsman;
- Protecting customer privacy;
- Travel warnings; or
- Other (please specify) _____

8. **[C1a = 8]** Human Resources (*Select only one from list below*)

- Hiring;
- Firing;

- Training;
- Learning and development; or
- Other (please specify) _____

9. **[C1a = 9]** Health and Safety (Select only one from list below)

- Working compensation;
- Insurance;
- Compliance with safety standards;
- Incident reporting; or
- Other (please specify) _____

10. **[Toronto only]** **[C1a=10]** Water and Wastewater (Select only one from list below)

- Billing inquiry;
- Permits;
- Bylaws;
- Programs, subsidies;
- Other (please specify) _____.

C2. Overall, how would you categorize the purpose of your **[Recall C1.b response]** interaction? Was it... (Select only one option) (*Interviewer note: read all of the options and examples*)

- 1. To complete a routine, periodic transaction (e.g., filings, payments, etc)
- 2. To get information or advice
- 3. To solve a problem, correct an error (including complaints)
- 4. To view/submit/obtain an application or registration (e.g., permits, licenses, zoning, **[Toronto only]** program, etc)
- 5. Anything else
- 9. Don't Know/No Response

C3. Which levels of government did you deal with for this service? Was it... (Check all that apply)

(*Interviewer note: Read all of the options as individual yes/no questions.*)

<input type="radio"/> 1. Federal	<input type="radio"/> 4. First Nation
<input type="radio"/> 2. Provincial, Territorial	<input type="radio"/> 9. Don't Know/Unsure
<input type="radio"/> 3. Municipal	

C4. And what was the initial channel or method of accessing this service? (Check only one option)

[Programming note: exclude for online mode] Please stop me when I say the one that applies to you. **D1**

<input type="radio"/> 1. Telephone	<input type="radio"/> 7. In-person visit to a government office
<input type="radio"/> 2. Website/Internet	<input type="radio"/> 8. Visit from a government representative
<input type="radio"/> 3. Email	<input type="radio"/> 9. Social networking media (e.g. Facebook, Twitter etc.)
<input type="radio"/> 4. Mail or parcel service	<input type="radio"/> 10. Mobile application
<input type="radio"/> 5. Fax	<input type="radio"/> 11. Other (Please specify) _____
<input type="radio"/> 6. Kiosk	<input type="radio"/> 99. Don't Know/Unsure

C5. Did you use any other channels to access this service? (Select all that apply) **[Programming note: exclude option provided in C4 from listing]**

<input type="radio"/> 1. Telephone	<input type="radio"/> 7. In-person visit to a government office
<input type="radio"/> 2. Website/Internet	<input type="radio"/> 8. Visit from a government representative
<input type="radio"/> 3. Email	<input type="radio"/> 9. Social networking media (e.g. Facebook, Twitter etc.)
<input type="radio"/> 4. Mail or parcel service	<input type="radio"/> 10. Mobile application
<input type="radio"/> 5. Fax	<input type="radio"/> 11. No other channels
<input type="radio"/> 6. Kiosk	<input type="radio"/> 99. Don't Know/Unsure

C6. Did you get access to this service using the channel you **preferred**?

(Read if required: By channel, I mean the method or technology used to access government services.)

- 1. Yes
- 2. No
- 9. Don't know/Unsure

[Ask ONLY if C6=2, and exclude options that were selected in C4 and C5.]

C6b. What channel would you have preferred to use to access this service?

[Programming note: exclude for online mode] Please stop me when I say the one that applies to you.

<input type="radio"/> 1. Telephone	<input type="radio"/> 6. Kiosk
<input type="radio"/> 2. Website/Internet	<input type="radio"/> 7. In-person visit to a government office
<input type="radio"/> 3. Email	<input type="radio"/> 8. Visit from a government representative
<input type="radio"/> 4. Mail or parcel service	<input type="radio"/> 9. Social networking media (e.g. Facebook, Twitter etc.)
<input type="radio"/> 5. Fax	<input type="radio"/> 10. Mobile application
	<input type="radio"/> 99. Don't Know/Unsure

C7. Using a scale of 1 to 5 where 1 = "Strongly Disagree" and 5 = "Strongly Agree" please indicate if you agree or disagree with the following statement.

Preferred Channel:	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. I was able to easily access this service by my preferred channel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

C8.a Of all these various channels for accessing this service, which was the principal or primary one you used?

(Check only one option) [Programming note: ONLY include those options selected in C4 and C5. Display all options ONLY if C4=99 AND C5=11 or 99]

<input type="radio"/> 1. Telephone	<input type="radio"/> 6. Kiosk
<input type="radio"/> 2. Website/Internet	<input type="radio"/> 7. In-person visit to a government office
<input type="radio"/> 3. Email	<input type="radio"/> 8. Visit from a government representative
<input type="radio"/> 4. Mail or parcel service	<input type="radio"/> 9. Social networking media (e.g. Facebook, Twitter etc.)
<input type="radio"/> 5. Fax	<input type="radio"/> 10. Mobile application

[Ask ONLY if C8.a = 1]

C8.b What was the specific method for accessing this service using the telephone channel? Was it...

- 1. Telephone with a live agent
- 2. Automated telephone
- 3. Telephone with interactive voice response (IVR)

Channel Experience

C9. We would like to discuss your experience using the **[Recall C8a response]** as your primary channel for this past interaction. Using a scale of 1 to 5 where 1 = "Strongly Disagree" and 5 = "Strongly Agree" please indicate if you agree or disagree with each item. **[Programming note: randomize the all of the following attributes]**

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
All Channels:							
a. I am satisfied with my experience using the [Recall C8a response] channel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. I was forced to use another channel to achieve my service needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Options or next steps were clearly explained	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If only one channel was used (C5=11)							
n. The process to get access to the service was easy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o. I was satisfied with the amount of time it took to get access to the service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If primary contact with staff was involved (either Telephone with a live agent or kiosk or in-person visit or visit from a government representative): [Ask ONLY if C8.b=1 or C8.a=6 or 7 or 8 or 11]	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
d. Service staff treated me fairly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Service staff were knowledgeable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Service staff understood my needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Service staff made every effort to address my needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Service staff treated me with courtesy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. I felt good about my interaction with service staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If internet or mobile app was primarily used: [Ask ONLY if QC8.a=2 or QC8.a=10]	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
j. The website had all the information I needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k. It was easy to find what I needed on the site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Programming note: The following attributes should be randomized and are only to be asked if multiple channels were used, i.e. C5≠11]

Access Experience

C9a. Thinking about your experience accessing the service related to **[Recall C1.b response]** please tell me how much you agree or disagree with each of the following statements. (Read if necessary: using a 5-point scale where 1 means "Strongly disagree" and 5 means "Strongly agree").

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
n. The process to get access to the service was easy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o. I was satisfied with the amount of time it took to get access to the service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Service Experience

C10. The following statements describe service quality. Thinking about your service experience related to **[Recall C1.b response]**, please tell me how much you agree or disagree with each. (Read if necessary: using a 5-point scale where 1 means "Strongly disagree" and 5 means "Strongly agree").

[Programming note: randomize the all of the following attributes]

All Service Channels:	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. I knew where or how to find the service I was looking for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. I received all the information I needed to receive the service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Receiving the service was easy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. I am confident my business information was protected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Getting this service did not place an unreasonable burden on my business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. In the end, I received the service I was seeking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. I was satisfied with the amount of time it took to receive the service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. I was satisfied with the amount of time it took to get any help I needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k. Any issues I encountered in the service process were easily resolved (Interviewer note: select N/A if no issues were encountered)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l. Any complaints I made about my service experience were addressed to my satisfaction (Interviewer note: select N/A if no complaints were made)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m. I have confidence any future issues will be addressed to my satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Toronto only]

C10.n How many times did you need to initiate contact before your issue was resolved? (Interviewer to capture response in drop-down menu)

[Programming note: A drop-down menu lists the options in 1 unit increments, up to "5 times or more". Include "Not Applicable" and "Don't Know" categories as well.]

C11. If you were to get this service again, what channel would you prefer to use as the primary means of accessing the service? (Select only one option) **[Programming note: exclude for online mode]** Please stop me when I say the one that applies to you. **[Programming note: The other option should only appear if C4=11]**

E1, F4e, F15

<input type="radio"/> 1. Telephone	<input type="radio"/> 7. In-person visit to a government office
<input type="radio"/> 2. Website/Internet	<input type="radio"/> 8. Visit from a government representative
<input type="radio"/> 3. Email	<input type="radio"/> 9. Social networking media (e.g. Facebook, Twitter etc.)
<input type="radio"/> 4. Mail or parcel service	<input type="radio"/> 10. Mobile application
<input type="radio"/> 5. Fax	<input type="radio"/> 11. Other (Please specify) _____
<input type="radio"/> 6. Kiosk	<input type="radio"/> 99. Don't Know/Unsure

Overall Service Experience

C12. Thinking back over your entire service experience, how much would you agree or disagree with each of the following statements? (Read only if required: where 1 means you "disagree strongly" and 5 means you "agree strongly")

All service Channels:	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. Receiving the service I wanted was easy	<input type="radio"/>						
b. I felt good about the service experience I had	<input type="radio"/>						
c. The service equals the best service offered anywhere	<input type="radio"/>						
d. The service experience exceeded my expectations	<input type="radio"/>						
e. I would speak positively to others about my service experience	<input type="radio"/>						
f. The service I experienced increased my confidence in public service	<input type="radio"/>						
g. Overall, I was satisfied with the service I received	<input type="radio"/>						

C13. If you were to use this service again, what one thing could government do to improve it? (Open-ended. Interviewer to capture verbatim response. Read if required: By one thing, I mean what is the most important thing the government could do to improve this service experience?)

- 2. Nothing, the service needs no improvements or changes
- 99. Don't know

[Programming note: A module approach will be undertaken for Section D and E, such that 50% of respondents answer Section D and 50% answer Section E]

SECTION D: SELF-SERVICE ISSUES

D1. We are interested in your opinion on self service and accessing services online. How much do you agree or disagree with each of the following statements using the 5 point scale you used earlier? *(If required: where 1 means you "disagree strongly" and 5 means you "agree strongly".)*

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. My business would like to be able to access all routine government services on the Internet <i>(Read if necessary: If your business already does this, we can select Not Applicable)</i>	<input type="radio"/>						
b. My business can now access all routine government services on the Internet (or other electronic systems, including automated telephone)	<input type="radio"/>						
c. My business would accept using the online channel for all government services if that was the only option	<input type="radio"/>						
d. [Ask only if QC11=code 2/3/9/10] My business would prefer to use new and emerging technologies (such as mobile applications)	<input type="radio"/>						
e. [Ask only if QC11=code 2/3/9/10] My business would benefit if e-services were accessible from a variety of devices	<input type="radio"/>						
f. [Ask only if QC11=code 1] My business would prefer to use telephone with interactive voice response (IVR)	<input type="radio"/>						
h. My business would benefit if services of municipal, provincial and federal governments were linked together seamlessly	<input type="radio"/>						

D2. Using a 5-point scale where 1 is “Very Ineffective” and 5 is “Very Effective”, how effective would the following incentives be in encouraging you to access government services online for your business? Note that some of these items may already be in place for your jurisdiction.

	Very Ineffective (1)	(2)	(3)	(4)	Very Effective (5)	Don't Know (9)	Already available to me (8)
a. Creating a single user account to access items specific to my business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Allowing for processing of payments online via credit card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Being able to get the service faster online than via other channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Having the service available 24 hours a day, 7 days a week	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Knowing that getting the service online involves fewer steps than other methods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Providing a rebate or reduced costs to users of online services (for example, potential for up to a 5% rebate)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Providing a way to connect to a “live” person while online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Having staff walk you through the use of online services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

D3. Using a scale from 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree", how much do you agree or disagree that you would use digital (*Read if necessary: the web, apps, and social media networks*) rather than traditional (*Read if necessary: telephone, in person*) channels for business purposes if you knew that using them meant...

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Don't Know (9)
a. Faster, more efficient resolution of problems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Government services could be accessed more easily	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. My business could track its progress through the stages of the service experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

D4. Thinking about using the internet to get government services, how concerned are you about each of the following? Please use a scale from 1 to 5, where 1 is “not concerned at all” and 5 is “very concerned”.

	Not concerned at all (1)	(2)	(3)	(4)	Very concerned (5)	Don't Know (9)
a. Identity theft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Privacy of your business information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Sharing of your business information between departments within one level of government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Sharing of your business information between different levels of government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Government's ability to effectively validate your identity so that access to your business information is protected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

D5. How many minutes do you think would be a reasonable amount of time to spend online to find the information you need to complete your transaction? (*Interviewer to capture response in the drop down menu*) **[Programming note: A drop-down menu lists the options in 1 minute increments, up to “20 minutes or more”]**

D6. What is the maximum number of web pages you think you should have to look at in order to find the information you need to complete your transaction? (*Interviewer to capture response in the drop down menu*) **[Programming note: A drop-down menu lists the options in 1 page increments, up to “10 or more”]**

SECTION E: REGULATORY ISSUES

We are interested in your opinion as to how governments consult with you regarding changes in policies, regulation(s) [bylaws] and/or other issues.

[Programming note: "Bylaws" to display for the Region of Peel respondents only]

E1. Considering recent changes implemented over the past 12 months in your jurisdiction, please indicate your level of agreement with the following statements. Using a 5-point scale where 1 = "Strongly Disagree" and 5 = "Strong Agree", please rate your agreement with the following statements.

Various Levels of Government	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. Changes were implemented with sufficient input from the business community	<input type="radio"/>						
b. Regulatory [or bylaw] changes were accompanied with sufficient information as to how it affected my business	<input type="radio"/>						
c. Businesses were given adequate time to assess and respond to potential changes	<input type="radio"/>						

E2. Using the same scale, how much do you agree or disagree with the following statement *(Read if required: where 1 means you "disagree strongly" and 5 means you "agree strongly").*

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
The number of regulatory requirements experienced by my business is reasonable	<input type="radio"/>						

E3. Overall, during the past three years, would you say that regulatory burden for your business has increased, decreased or remained the same?

- 1. Increased
- 2. Remained the same
- 3. Decreased
- 9. Don't know/no response

E4. Using the 5-point scale you used earlier, how much do you agree or disagree with the following statements related to red tape reduction. *(Read if required: where 1 means you "disagree strongly" and 5 means you "agree strongly").*

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
a. Electronic alerts and automatic notifications would make it easier for my business to navigate the service delivery process	<input type="radio"/>						
b. My business would be willing to pay a 'convenience' fee to 'skip the line' and get a government service or product more quickly	<input type="radio"/>						
d. It would be more efficient for my business if services	<input type="radio"/>						

	Strongly Disagree (1)	(2)	(3)	(4)	Strongly Agree (5)	Not Applicable (7)	Don't Know (9)
were 'bundled' ¹ so that more than one service could be processed at a time							

E5. Please tell me how effective each of the following options would be in reducing the regulatory burden on your business. Please use a 5-point scale where 1 = "Very Ineffective" and 5 = "Very Effective".

	Very Ineffective (1)	(2)	(3)	(4)	Very Effective (5)	Don't Know (9)
a. Having just ONE government identity card or number to access any service <i>[Interviewer note: take note of whether or not respondents require clarification]</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Having fewer policies and regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Establishing standards on the administration of regulatory services; for example, being notified when all documentation required for a service has been received or knowing how long it would take to receive a license	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

¹ Example of "**Service Bundling**": opening a restaurant requires a set of licenses, including construction permits, liquor licences, etc., so all could be taken care of at the same time.

SECTION F: PRIZE DRAW

Thank you for your involvement in this important survey! Just a few last items to finish up.

F1. You are eligible for entry in a draw to win one Air Canada trip for two to anywhere in North America or one of four cash prizes valued at \$250.00 each. Would you like to enter into the prize draw?

1. Yes (GOTO F2)
2. No

F2. *(Interviewer to confirm name of respondent)*

Is this the best phone number to reach you should you win?

(Ask only if required: Please provide your e-mail address to contact you should you win.)

1. Name: **[Recall respondent's name from introduction]**
2. Office Phone: **[Recall business phone number]**
3. Email Address: _____ @ _____

[Programming note: The following question is to be included in both the telephone and online survey]

F3. Did your organization receive notification about this survey by..

- 1. E-mail **[Go to F3a]**, or
- 2. Letter by Mail *(Interviewer note: i.e., by Canada Post)*
- 99. Don't know/no response

F3a. Is there any reason why you did not complete the survey online?

(Open-ended. Interviewer to capture response)

Thank you once again! That concludes our survey.

On behalf of all levels of government in Canada and the Institute for Citizen-Centred Service, I want to thank you for your feedback and the time you have contributed