



2012 Customer Values Research: Survey Results

Purpose – For Information

The purpose of this report is to provide a summary report on the Technical Standards and Safety Authority's (TSSA's) 2011/2012 customer values research results.

Background

Since 2006, TSSA has retained EKOS, an independent professional research firm, to conduct quantitative research, using accepted statistical methodologies, among its customer base with an aim to providing the organization with research intelligence to help in the development of an effective value proposition and ultimately gain valuable insights to support customer relationship excellence strategies. Using EKOS has also ensured third-party independence as well as confidentiality for respondents.

The goal of the research is to strengthen customer relationships through establishing a deeper and more nuanced understanding of both customers' and TSSA's understanding of the value TSSA provides as an organization.

The methodology for the 2012 research featured a blend of qualitative and quantitative methods including: a series of diagnostic focus groups with Elevating Devices and Fuels contractors; and a telephone-based survey sampling 1,208 customers across all program areas between March 23 and April 9, 2012.

Since last year, the survey also tracked perceptions and attitudes towards compliance and shared responsibility. The study also set out to better understand the variables affecting perceptions of value and satisfaction with two key underperforming customer groups – contractors in the Elevating Devices and Fuels sector. This task was carried out through a series of diagnostic focus groups.

Executive Summary

On the whole, the results in the current survey indicate a general return to the levels identified prior to 2011 and importantly confirms that the overall declines experienced last year were not the beginning of a downward trend. In some cases the variations are within or very close to the overall margin of error; however, there are some results that indicate a statistically significant increase, most notably TSSA's effectiveness in maintaining public safety. The 2012 results are directionally consistent with historical upward trends tracked through previous surveys and provide directional insights that are important for informing decisions related to improving TSSA's customer relationship strategies.

Perceptions of TSSA's value remain on balance positive and are quite consistent with previous years. There has been a marginal upward shift in customer satisfaction returning that rating to levels reported in previous surveys. While there was a very limited downward shift in the number of customers that view TSSA as providing a high level of value, nine in ten still see TSSA as providing moderate or high levels of value. A strong majority of customers continue to believe TSSA is headed in the right direction and have an overall positive impression of the organization. These results indicate that customers have a good level of comfort with TSSA's strategic direction.

As in past, the results are essentially consistent across all customer groups with no particular segment or program area varying significantly from the overall results. This is evident across virtually all the tracking benchmarks and value attributes. The survey does provide further confirmation that there are some customer groups, for example fuels and elevating devices contractors, that while improving slightly in 2012, still remain below the average results. These findings again confirm the importance of a strong focus on these groups in the action plan to address the results of the customer value survey. In 2012, the results for fuels licensees demonstrated declines from the historic and very consistent findings for this customer group. As these results are only a single data point there is insufficient data to establish if this marks an actual overall change or is temporal in nature.



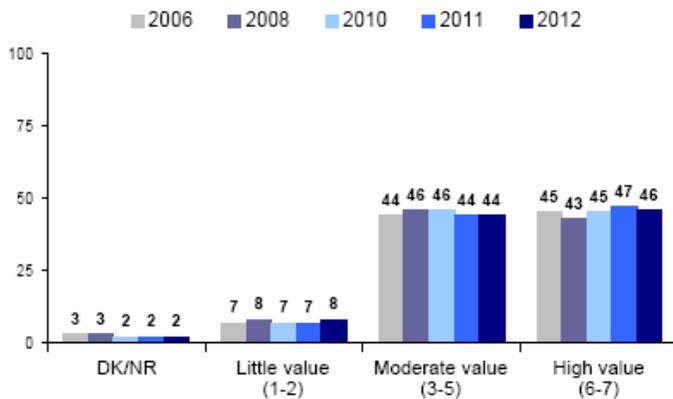
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In 2012, there has been a modest recovery across almost all value attributes; however, all but one remain below the 2006 benchmarks. Three value attributes (responsiveness, understanding customer needs and is accountable for its decisions) continue to decline. These along with all of the survey findings provide important input that informs the organization with respect to its planned action to address the 2012 customer value survey results.

Survey Results

Value of TSSA

Q. Thinking about all the different things that TSSA may do for you and others in the province of Ontario, how would you rate the overall value of the organization? Rate your answer on a 7 point scale where 7 is a very high degree of value, 1 is little or no value and the midpoint 4 is a moderate value.



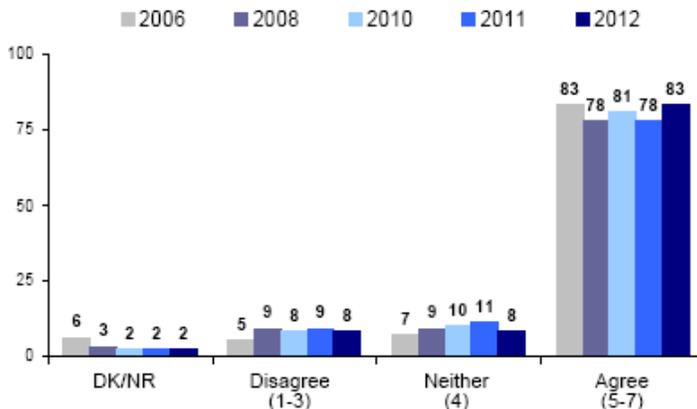
Base: All customers; percentages; n=1208 (2012)

- Consistent with long-term tracking, nine in ten customers feel TSSA has at a moderate or high level of value, and half of these feel it is high value.

Effectiveness in Maintaining Public Safety

Q. Please rate the extent to which you agree or disagree with the following statements:

TSSA is effective in maintaining public safety in Ontario



Base: All customers; percentages; n=1206 (2012)

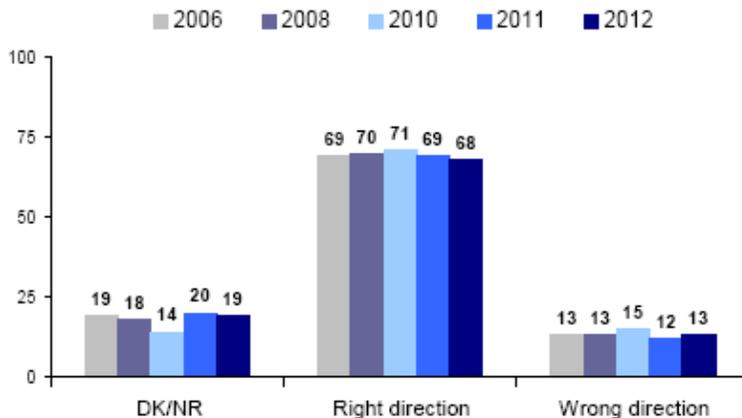
- Perceptions that TSSA is effective at maintaining public safety in Ontario have improved significantly and have returned to the high water mark set in 2006.



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Overall Direction of TSSA

Q. Overall, would you say that TSSA is moving in the right or wrong direction?

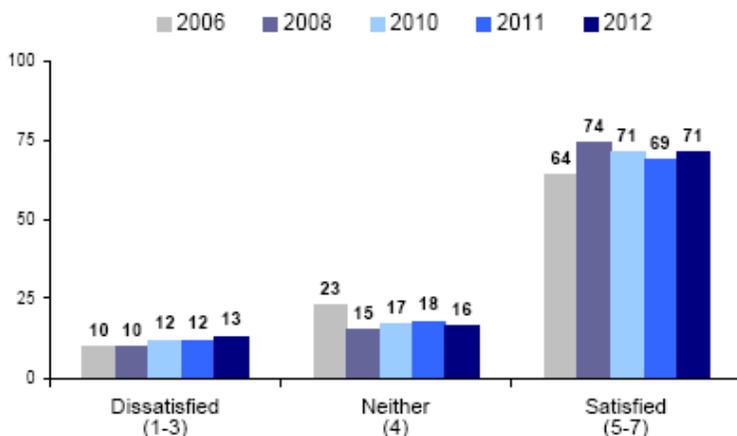


Base: All customers; percentages; n=1208 (2012)

- Though it has slipped slightly the past two years, over two-thirds of customers feel TSSA is moving in the right direction.

Satisfaction with Services from TSSA

Q. Overall, how satisfied are you with the services you receive from TSSA? Rate your answer on a 7 point scale where 7 is extremely satisfied, 1 is extremely dissatisfied and the midpoint 4 is neither satisfied nor dissatisfied.



Base: All customers; percentages; n=1208 (2012)

DK/NR (2012)=1%

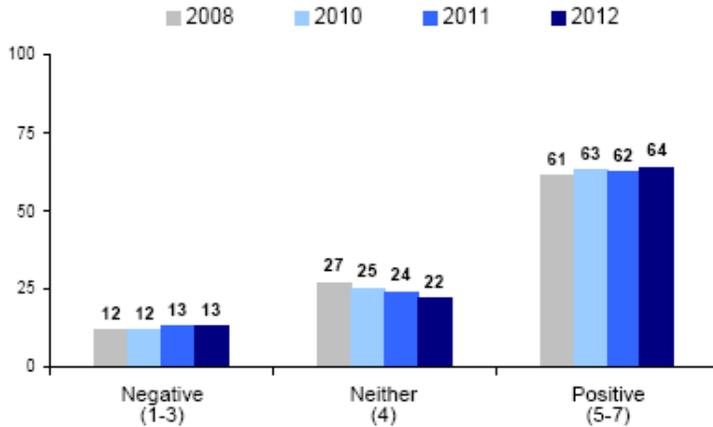
- Overall satisfaction with service delivery remains moderately strong at just over seven in ten, although there is a slight creeping increase taking place in dissatisfaction.



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Overall Impression of TSSA

Q. What is your overall impression of TSSA? Please rate on a scale from 1 to 7 when 7 is extremely positive, 1 is extremely negative, and the midpoint 4 is neither positive nor negative.



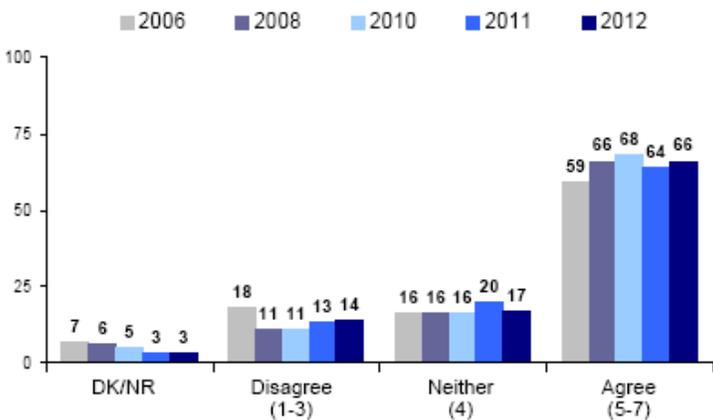
Base: All customers; percentages; n=1208 (2012)

- General impressions of TSSA remains the least favourably rated of the overall benchmarks at under two-thirds positive but is at its highest level since 2008.

Managing Risk

Q. Please rate the extent to which you agree or disagree with the following statements:

TSSA helps my organization manage risk more effectively



Base: All customers; percentages; n=1208 (2012)

- Two-thirds agree that TSSA helps them manage risk more effectively, a slight improvement over 2011.

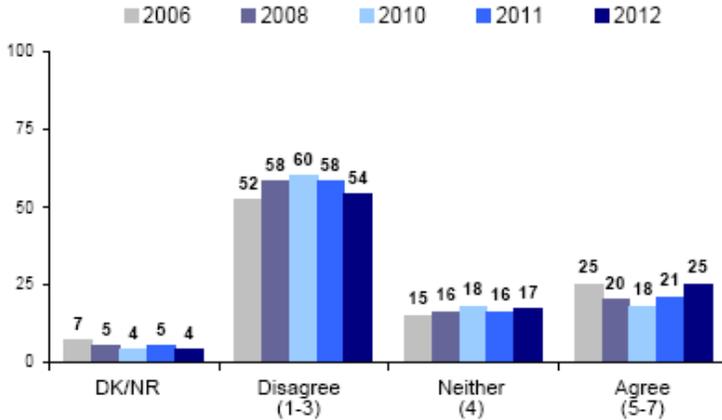


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Consistency

Q. Please rate the extent to which you agree or disagree with the following statements:

TSSA is not very consistent in how it deals with me



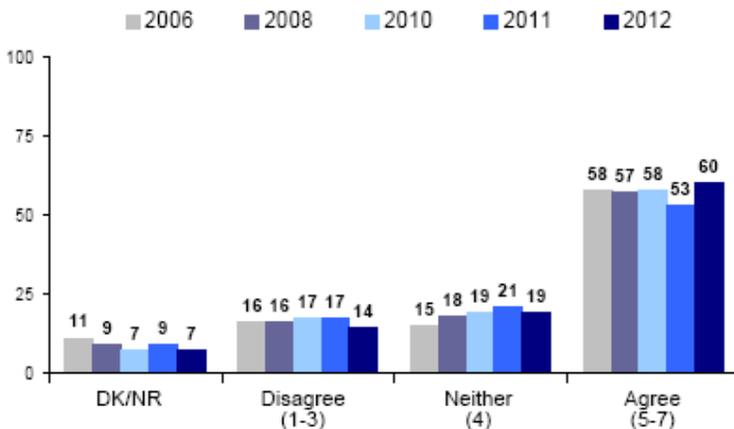
Base: All customers; percentages; n=1208 (2012)

- There is now a worsening trend in customers' perceptions of consistency. The number of customers who feel that TSSA is not very consistent in dealing with them has increased in each of the last two years and is now at the one quarter mark.

Level Playing Field

Q. Please rate the extent to which you agree or disagree with the following statements:

TSSA is effective at creating a level playing field



Base: All customers; percentages; n=1208 (2012)

- There has been significant improvement in the number of customers who feel that TSSA is effective at creating a level playing field. Fully 60 per cent now agree with this notion, and this is the highest level since 2006.

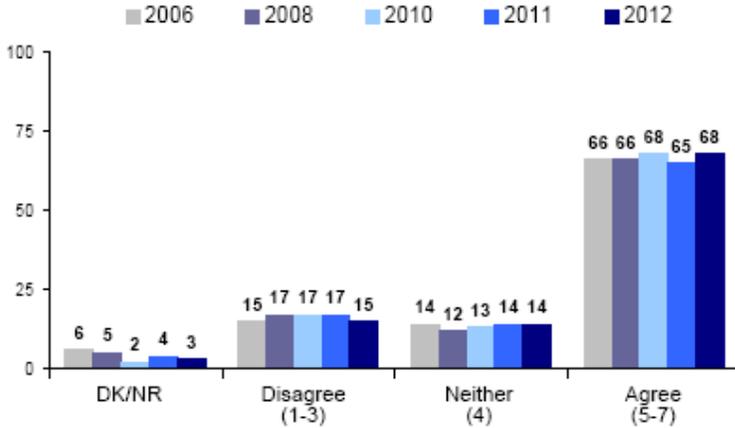


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Respect of People in Industry

Q. Please rate the extent to which you agree or disagree with the following statements:

TSSA has the respect of people in my industry



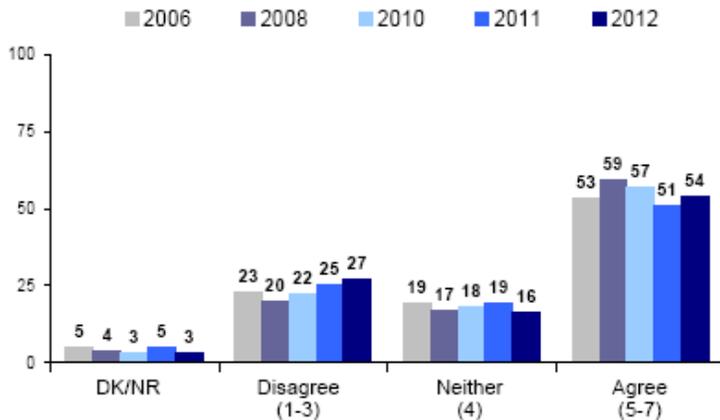
Base: All customers; percentages; n=1208 (2012)

- Respect in industry holds steady at the two-thirds mark.

Value for Fees Paid

Q. Please rate the extent to which you agree or disagree with the following statements:

TSSA provides good value for the fees we pay



Base: All customers; percentages; n=1208 (2012)

- The number of customers who feel that TSSA does not provide good value for fees continues to increase, as it has every year since 2008. It now sits above the one-quarter of customers mark.



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Other Findings

- When asked to identify the best and worst aspects of TSSA, customers focus on its safety role for the former and fee increases for the latter.
- Over three quarters of customers continue to feel that TSSA is a collaborative ally helping to ensure positive safety outcomes.
- Two-thirds of customers agree that working with TSSA to improve safety helps their bottom line.
- Customers were challenged with identifying key priority areas for improving dealings with TSSA. Each of the four key priorities involve TSSA taking a more active role in communicating with customers and providing training.
- Perhaps to some surprise (given qualitative findings), consistency and predictability are relative low priority items (though these results do vary by program area).
- Customers were asked for the second year what might be effective in achieving a better level of compliance. As in 2011, this year's survey places recognition of a shared responsibility, and an improved effort by both TSSA and industry in educating people in industry as the key measures to improving compliance.
- Increased enforcement and punishment continue to be seen as the least effective measures.
- TSSA continues to perform well on customers' ratings of efforts to ensure greater compliance. While performance is reasonably good at approximately two-thirds favourable across all measures, these ratings leave room for improvement.
- The number of customers who feel that TSSA lacks the expertise to enforce regulations has increased significantly and now sits just below the one-third level.
- There continues to be fairly widespread recognition (two-thirds) that enhancing safety is a responsibility shared equally between TSSA and industry.
- This survey has seen a decrease in the number of customers who feel that they have an adequate amount of information for compliance.
- There has also been a slight increase in the significant number of customers who express confusion about regulations and how they apply to their situation.
- A notable increase is also seen in the number of customers who feel they need more support from TSSA to ensure their compliance. Today, fully two in five express this view.
- Over a quarter of customers agree that TSSA is overly focused on compliance and may lose sight of safety as a result.