



2013 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) 2012/2013 customer values research results.

Background

Since 2006, TSSA has retained 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. This 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 2013 customer values research, conducted by Modus Research was quantitative in nature through a telephone-based survey sampling 1,215 customers across all program areas between March 13 and April 1, 2013. The survey used an altered focus from previous tracking surveys, placing greater emphasis on customer interaction rather than just corporate performance and reputation; however, and the basic structure of the tracking instrument remained the same.

Along with tracking customer perceptions of value and updating key drivers of value, the 2013 customer values survey tracked issues around compliance introduced in 2011, and provided an update on TSSA's Performance Index score. The survey also tested a number of key service attributes to be used in the development of an incentive-based pay/quality of services metric.

Executive Summary

From a high level point of view, there are a number of key findings to highlight:

- TSSA continues to perform very well on customers' perceptions of its ability to achieve its core mandate. An all time high number of customers feel TSSA is effective at maintaining public safety.
- The Performance Index saw a significant decline over the past year. This was entirely due to increased customer concerns around the consistency of TSSA's dealings with them.
- Customers who feel that TSSA is not consistent in the way that it deals with them had been increasing steadily over the past few surveys. The key factor influencing this change is the belief that TSSA is overly focused on compliance.
- Many of the compliance findings in this survey show notable changes, some positive and some negative. The findings suggest that customers may be tiring of a narrow focus on compliance. There has been a notable increase in those feeling TSSA may be losing sight of safety due to an overly strong focus on compliance.
- Customers are also less likely to feel they need support from TSSA on compliance related issues. At the same time, they feel TSSA is doing a better job of providing support and training of staff on regulatory issues, and also being constructive in their approach.
- Staff ratings based on customer interactions, introduced largely anew in this survey, show generally positive results. Areas that may require additional attention are focused on understanding customer needs and effectiveness at finding solutions.
- Importantly, when staff are assessed on the dimensions of satisfaction, value and consistency, they score markedly better than how customers rate the corporation.
- A number of important corporate performance measures remain depressed from the declines witnessed in 2011. Key among these are: accountability, impartiality and management.



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- Some key trends with certain customer groups have persisted in this survey. Contractors, as has been the case since the survey's first iteration, consistently provide below average results. The same is now true of FS licensees; a finding first noticed in the two most recent surveys and now a strong trend.

Enhancing customer value is directly aligned with and supports one of TSSA's vision goals - "our regulated customers will believe we deliver high value by promoting and enforcing public safety." Through TSSA's annual customer value survey and other research efforts those things that most influence customer's perceptions are identified including how they rate the value TSSA provides to them. While the ultimate goal is to increase the percentage of customers that rate TSSA as delivering high value, it is recognized that perceptions of value change slowly and most often over a multi-year time-frame. Therefore, a more sensitive metric, the Performance Index, has been developed, with advice and guidance from external subject matter experts. This metric is a weighted composite index that combines the results of five questions that are included in the annual customer value survey. Each of these questions have proven to be one of the key drivers of customer value and by measuring change in the index it is possible to track the organization's performance on customer value.

After rebounding somewhat in 2012, the Performance Index score has dropped significantly this year. This decrease is entirely due to worsening perceptions of consistency for TSSA corporately. There has been a sharp increase in the number of customers who say that TSSA is not consistent in how it deals with them. Each of the other indicators in the Index remains constant with last year's results, with no significant changes year over year.

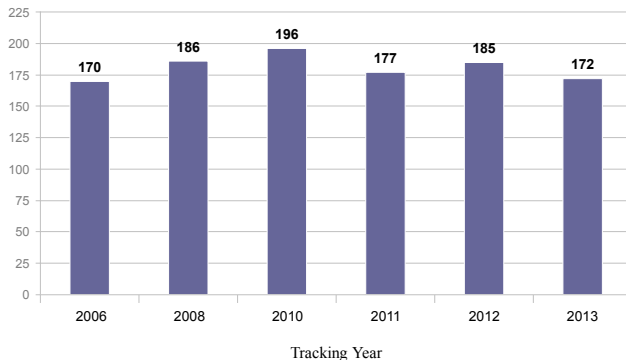
It is important to note that the indicators in this metric are all broader corporate assessments. For instance, when customers assess staff on consistency, they score much better than for when customers assess TSSA itself. Many of the survey findings, past and present, suggest that customers perceive this to be a management issue. This suggests a need for TSSA to address issues around consistency at the corporate level, specifically around how the organization approaches its regulatory role and delivers its mandate.

Survey Results

Performance Index

Performance Index

- > Agreement: TSSA is effective in maintaining **public safety** in Ontario
- > Agreement: TSSA helps my organization **manage risk** more effectively
- > Agreement: TSSA is not very **consistent** in how it deals with me
- > Overall, how **satisfied** are you with the services you receive from TSSA?
- > 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?



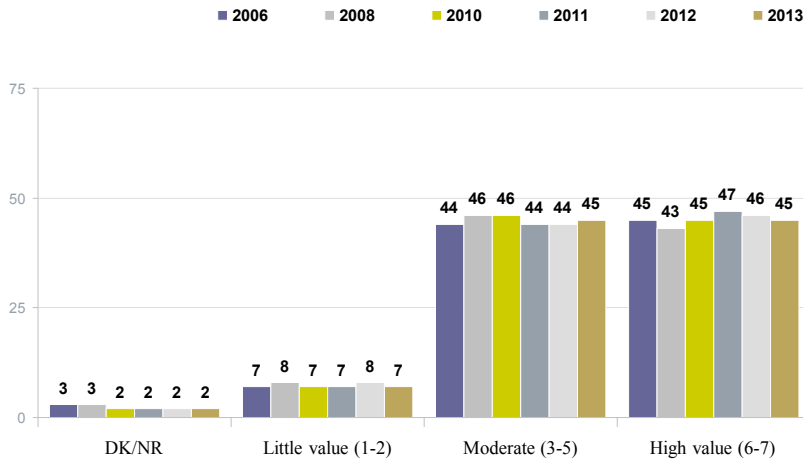
BASE: All customers, composite index scores



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Overall Value of TSSA

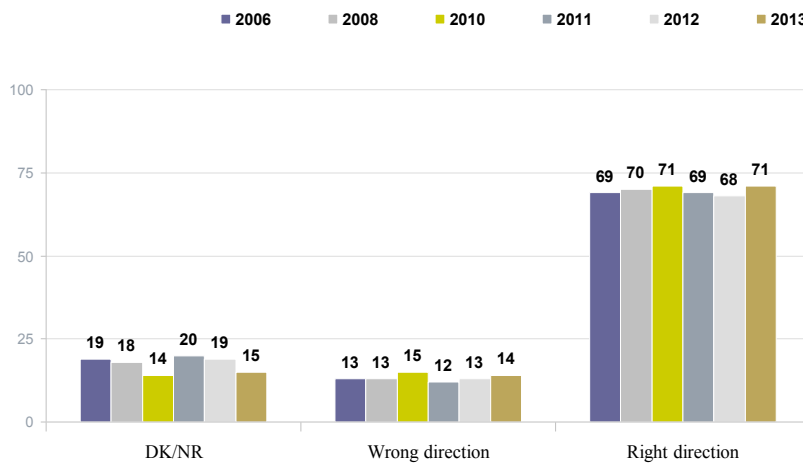
Q. Thinking about all the different things that TSSA may do for you and others in the province of Ontario, how would you rate the overall value of the organization? Rate your answer on a 7 point scale where 7 is a very high degree of value, 1 is little or no value and the midpoint 4 is a moderate value.



BASE: All customers, n=1,215; percentages; March 2013

Overall Direction of TSSA

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



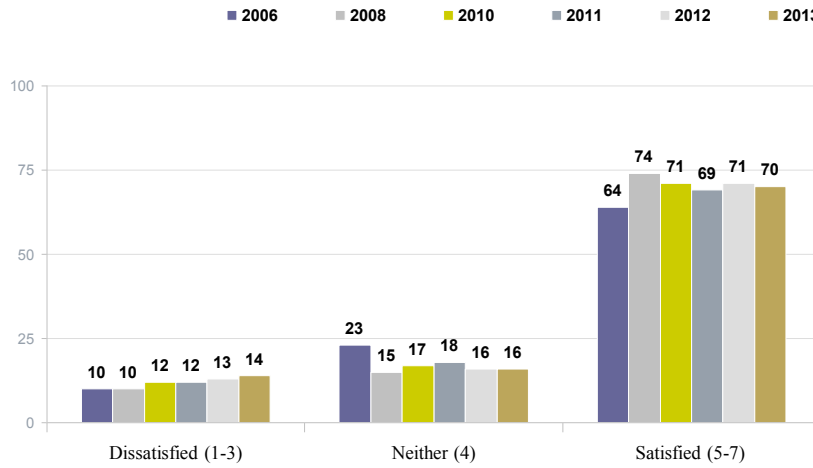
BASE: All customers, n=1,215; percentages; March 2013



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Overall Satisfaction with TSSA Services

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.

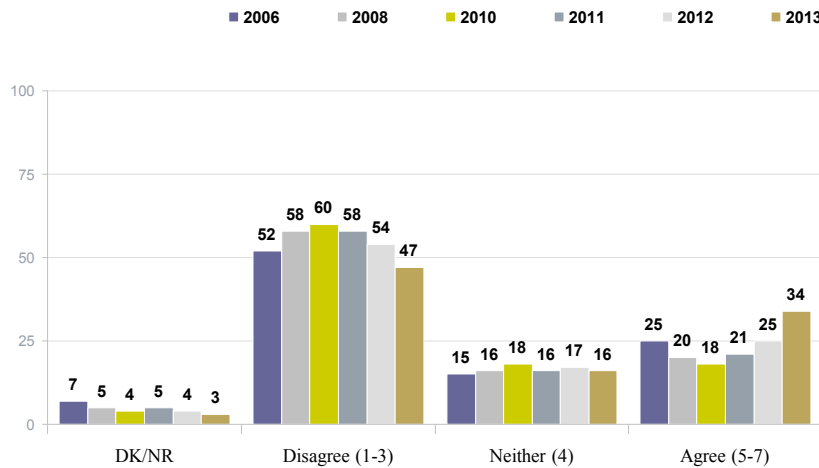


BASE: All customers, n=1,215; percentages; March 2013

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, n=1,215; percentages; March 2013

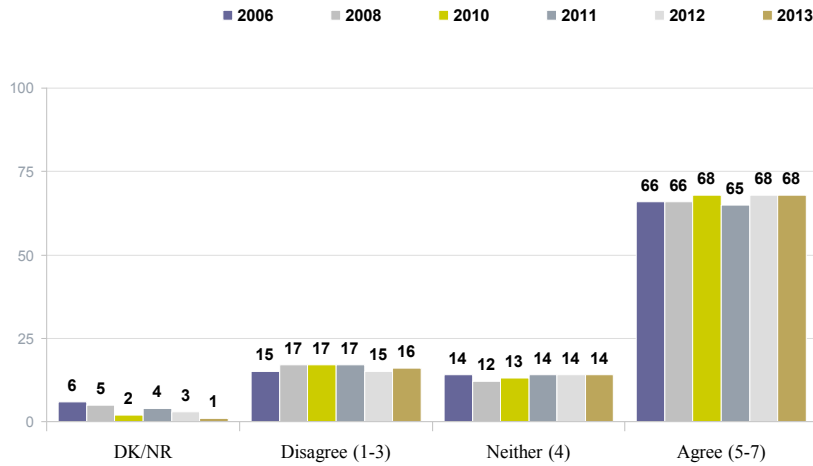


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Respect of People in Industry

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

- > TSSA has the respect of people in my industry

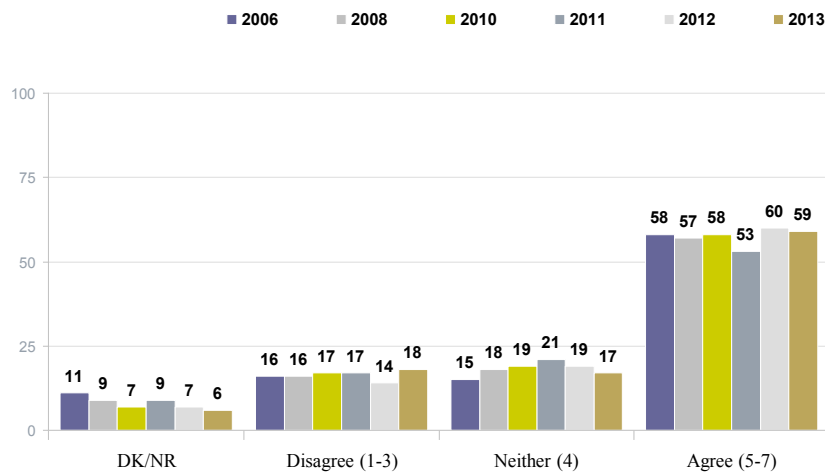


BASE: All customers, n=1,215; percentages; March 2013

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, n=1,215; percentages; March 2013

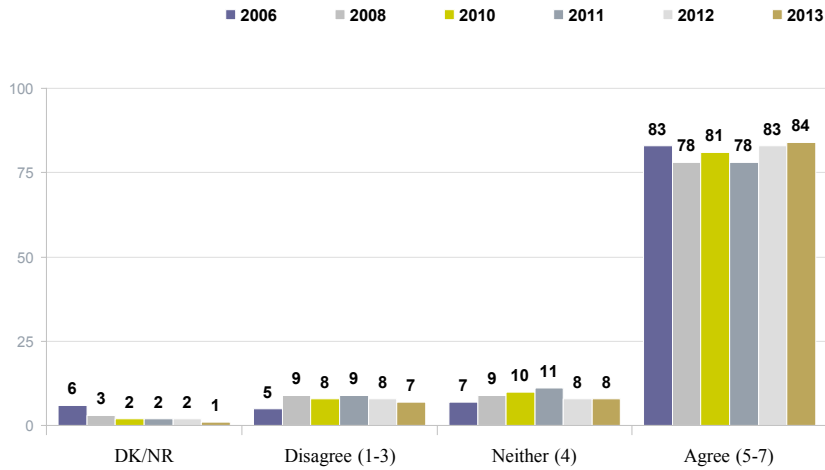


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Effectiveness in Maintaining Public Safety

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

- > TSSA is effective in maintaining public safety in Ontario

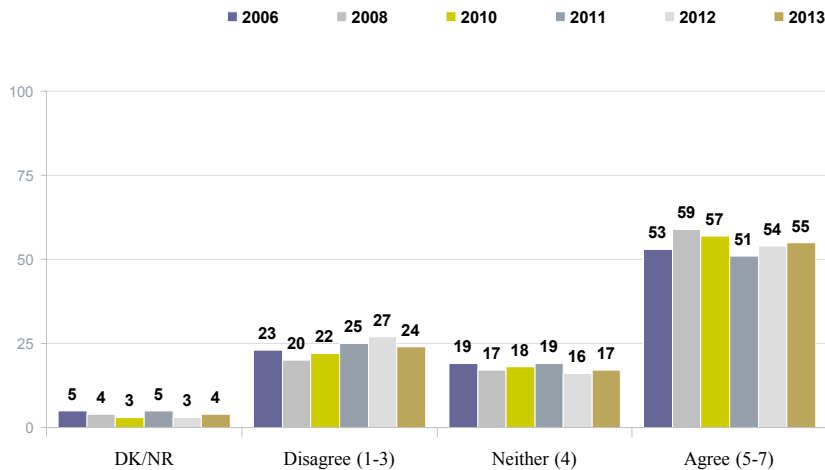


BASE: All customers, n=1,215; percentages; March 2013

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, n=1,215; percentages; March 2013

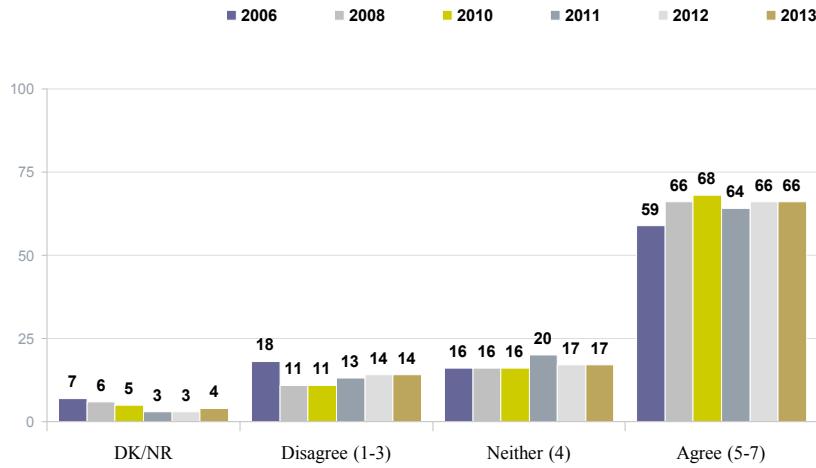


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Managing Risk

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, n=1,215; percentages; March 2013

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