

Clients Speak

A Report on Single-Window Government Services in Canada

R.A. Malatest & Associates Ltd.

for

The Public Sector Service Delivery Council

and

The Institute of Public Administration of Canada

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IPAC/IAPC

1075, rue Bay Street, Suite/Bureau 401

Toronto, Ontario, M5S 2B1 CANADA

Tel./Tél. : (416) 924-8787

Fax: (416) 924-4992

e-mail/courriel : ntl@ipaciapc.ca

Internet : www.ipaciapc.ca

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Thank you

TABLE OF CONTENTS

EXECUTIVE SUMMARY	vii
SOMMAIRE EXÉCUTIF	xi
INTRODUCTION	1
Chapter 1. The Research Process	2
1.1 Data “Weighting”	3
1.2 Survey Response	3
1.3 Use of Common Measurements Tool (CMT) Rating Scale	4
Chapter 2. Who are the Clients?	5
2.1 Citizen Characteristics	5
2.2 Business Characteristics	7
2.3 Client Characteristics – Implications for Service Delivery	8
Chapter 3. Use of Specific Channels	10
3.1 Reasons for Accessing Services	10
3.2 Service Requirements	12
3.3 Access to Services by Specific Channels	13
3.4 Service Outcomes	15
3.5 Tracing Client “Paths” in Accessing Government Services	16
3.6 Analysis of Client Utilization of Various Service Channels	18
3.6.1 Channels Used by Business Clients	18
3.6.2 Channels Used by Citizen Clients	19
3.7 Citizen Use of New Channels	20
3.7.1 Kiosk Use	20
3.7.2 Internet Use	21
3.8 Single-Window Service Awareness	21
3.9 Prior Organization Use	23
3.10 Service Accessed – Implications for Service Delivery	24
Chapter 4. Customer Satisfaction with Single-Window Services	26
4.1 Satisfaction with Service Received	26
4.2 Satisfaction with Service Delivery	28
4.3 Satisfaction and Number of Referrals	30
4.4 Satisfaction with Length of Time it Took to Complete Service	31
4.5 Client Satisfaction – by Channel by Service Requirement	34
4.6 Client Satisfaction – by Cost of Service	35

4.7	Client Satisfaction – by Channel by Service Requirement (Channel "Loyalty").....	36
4.8	Client Satisfaction – Implications for Service Delivery.....	40
Chapter 5.	The Security Issue.....	42
5.1	Citizen Confidence with Security Protection	42
5.2	Client Security Confidence – Implications for Service Delivery	44
Chapter 6.	Client Profiles	45
6.1	“Client Profiling”.....	45
6.2	Client Profiles – Implications for Service Delivery	47
Chapter 7.	What Business Clients Want from Single-Window Services.....	48
7.1	Assessing Business Involvement with Government	48
7.2	Managing Accounts with the Governments: Options	51
7.3	Service-Delivery Preferences	52
7.4	Selected Business Issues – Implications for Service Delivery	54
Chapter 8.	The Digital Identity.....	56
8.1	Opinions about Possible Consolidation of “Electronic Identities”	56
8.2	Digital Identity – Service Delivery Implications	59
Chapter 9.	The "One-Stop" Shop	60
9.1	Need for Greater Integration of Government Services (“One-Stop” Shop).....	60
9.2	Business Identification of “Gaps” in Service Delivery – Selected Issues	61
9.3	Suggested Improvements for the Delivery of Government Single-Window Services – Citizen Sample	62
9.4	“One-Stop” Shop – Implications for Service Delivery.....	63
Chapter 10.	Conclusions.....	65
Chapter 11.	Improving Single-Window Service Delivery: An Action Plan.....	67
APPENDIX A.	ORGANIZATION DESCRIPTIONS.....	69
APPENDIX B.	SURVEY COMPLETIONS BY ORGANIZATION	71
APPENDIX C.	RESEARCH CAVEATS	72

EXECUTIVE SUMMARY

This project reflects the opinions and experiences of citizen and business clients who accessed government services from one of eleven participating single-window organizations.

Clients Speak: A Report on Single-Window Government Services was initiated by the Institute of Public Administration of Canada (IPAC) on behalf of the following government “single-window” organizations:

- Canada Business Service Centres
- Service Canada
- British Columbia’s Government Agents
- Ontario Business Connects
- Ontario Government Information Centres
- Service New Brunswick
- Government of the Northwest Territories
- Service Nova Scotia and Municipal Relations
- Region of Halton, Ontario
- Enterprise Toronto
- City of Vancouver

The purpose of this study was to examine the use of “single-windows” for different specific services across the country at the local, provincial/territorial and federal levels of government. Issues regarding satisfaction and service preference among both business and citizen clientele are addressed in this report.

The findings of this report are based on the results of an extensive survey (4,806 completions and an overall response rate of 70.2%) of both business and citizen clientele from across Canada in the summer of 2001. As response rates for each survey are all above 64%, the results of this survey can be viewed with considerable confidence.

A summary version of this report is available through IPAC, and both documents are available on its website at www.ipaciapc.ca.

KEY FINDINGS:

Clients are satisfied with government single-window services.

Overall, more than four in five (81.7%) clients are satisfied with the services provided. Satisfaction ranges from a high of 85.1% among those clients who accessed services from a specific provincial office to 73.9% for those who accessed services from a specific municipal office.

Using the standardized Common Measurements Tool (CMT) rating scale, overall satisfaction is estimated to be 84.3% among citizen respondents and 79.1% among business respondents. Combining the responses for both groups, government single-window services score an impressive 81.7% satisfaction rating.

Much of the reason for the high level of satisfaction can be attributed to the high proportion (60%) of clients who obtained the required service/information upon their first visit and the high proportion (69.7%) of clients who reported that they obtained their required service within 30 minutes.

More work needs to be done to improve service delivery to businesses.

A markedly lower proportion (51.6%) of business respondents received the required service as a result of their first contact with their single-window organization. Very few (less than 2%) respondents noted that their inquiry had resulted in a dead-end (1%), failure (0.8%), or an abandoned search (0.7%). The data suggests, however, that a higher proportion of business respondents were required to return and/or be referred to other single-window organizations to obtain their required service than was the case for citizen clients.

Most clients still use the telephone and walk-in channels.

More than three-quarters (83.8%) of clients report that the first channel used was either walk-in (52.1%) or telephone (31.7%) services. The results of the survey suggest that citizens and businesses utilize a variety of channels to access government services, including electronic (Internet, kiosks), personal (telephone, walk-in) and other (fax, mail) channels. A smaller number (10%) of clients utilized the Internet as their initial channel to contact single-window government services.

One size does not fit all: different clients use different channels to do different things.

The survey data indicate that each channel has a range of clients with different characteristics and requirements. For example, while Internet clients tend to be better educated, a significant proportion of telephone (51.4%) and walk-in (42%) clients have a college diploma or university degree. Similarly, business clients represent a diverse range of industries and come from business establishments of varying sizes.

Walk-in services are very effective.

Overall, while 60% of clients obtained their required service during their first contact, there are differences by service channel. For example, while 74% of walk-in clients report that they had obtained the necessary services during their first contact, a much lower proportion of telephone clients (37%) report a similar outcome after their initial contact.

On average, clients attempted to access government services 1.5 times before they obtained the service and/or stopped trying. In general, business respondents had more contact (1.6 contacts made) than did citizen respondents (1.4 contacts made) with their government single-window organizations.

Several reasons could account for the more limited success of business respondents in obtaining the required service upon their first contact. Among these include

- more diverse/complex requirements of business clients (e.g., development permits, loan/grant applications); and
- less knowledge among business clients as to the appropriate organization that delivered the various services required.

Being there is still important.

Overall, survey results suggest that there is a need for personal contact with clients, as more than 80% initially made contact with the single-window organization through walk-in (52.1%) or telephone (31.7%) channels. Less than 12% of clients first accessed services via electronic (Internet, kiosk) channels.

First contacts are key: speed is appreciated.

Analysis of the data suggests that there is a marked decline in client satisfaction as clients are referred to other organizations/branches. For example, client satisfaction declines from 87.6% among those clients who obtained their services upon their initial inquiry to 24.1% among those clients who indicate that they were referred to other organizations/branches four times. Similarly, among those clients who received their required service within 10 minutes, 92.3% indicate that they were satisfied with the service. Among those individuals who had to wait more than 31 days to obtain their service, a much lower proportion (53.5%) indicate that they were satisfied with the service received.

Client loyalty is highest with the Internet.

To measure client satisfaction with a particular service, the proportion of clients who indicate that they would utilize the same channel again can be examined. Analysis of the data indicates that “loyalty” to a channel varies from a high of 78.3% among individuals who first accessed services via the Internet to a low of 41.7% among those individuals who first accessed their service by mail. On average, 60% of clients indicate a desire to use the same channel for future service requirements.

Most (not all!) business clients want "on-line" service delivery.

Despite the relatively low proportion of business respondents who reported information (21.1%) or made non-Canada Customs and Revenue Agency payments on-line (10.3%), many businesses were supportive of more on-line services. While more than one-half (52.2%) of business respondents are supportive of moving to a model, whereby all routine business would be completed via the Internet, approximately one-quarter (23.2%) of business clients do *not* support such a concept. It should be noted that business clients vary substantially. Small-business client needs are very different from those of big business.

Support for a single-window strategy is strong.

Survey data suggest that there is a significant support for greater integration of government services. Business and citizen respondents were asked the extent to which they supported the consolidation of municipal, provincial/territorial and federal government services – to “seamlessly” link them. For example, there is significant support for the integration of government services, as 79.6% of business and 81.2% of citizen respondents would prefer a “one-stop” shop for government services.

E-identification has support.

Overall, almost two-thirds (60.6%) of all respondents are supportive of the concept of a single electronic identification that would allow access to a range of government programs and services. This support, however, is not uniform across the various survey strata: business respondents are more supportive of a single ID (66.9%) than are citizen respondents (54.1%). Similarly, a high proportion (62.1%) of clients (business and citizen) are supportive of the concept of a single card that could be used for multiple government programs.

Because the survey was completed prior to September 11, 2001, citizen and business views with respect to electronic identification and/or other security issues could now be markedly different from the results presented in this report.

SOMMAIRE EXÉCUTIF

Ce projet reflète les opinions et expériences des citoyens et de la clientèle commerciale qui ont eu accès aux services gouvernementaux offerts par l'un des onze organismes multiservices participants.

Le projet «*Clients Speak: A Report on Single-Window Government Services*» a été entrepris par l'Institut d'administration publique du Canada (l'IAPC) avec la collaboration des organismes publics suivants qui offrent des services à « guichet unique »:

- Centres des services aux entreprises Canada
- Service Canada
- British Columbia Government Agents
- Entreprises branchées de l'Ontario
- Centres d'information du gouvernement de l'Ontario
- Service Nouveau-Brunswick
- Gouvernement des Territoires du Nord-Ouest
- Service Nova Scotia and Municipal Relations
- Région de Halton (Ontario)
- Entreprise Toronto
- Ville de Vancouver

L'objectif de cette étude est d'examiner l'usage du service à « guichet unique » de services spécifiques offerts au pays par les paliers de gouvernement municipal, provincial/territorial et fédéral. Les questions relatives à la satisfaction et à la préférence des citoyens et de la clientèle commerciale en matière de service sont abordées dans le présent rapport.

Les conclusions de ce rapport sont basées sur les résultats d'une longue étude (4 806 réponses et un taux de réponse global de 70,2 %) effectuée auprès des citoyens et de la clientèle commerciale dans l'ensemble du Canada durant l'été 2001. Les taux de réponse de chaque sondage étant tous supérieurs à 64 %, on peut donc considérer en toute confiance les résultats de ce sondage.

Une version sommaire du rapport *Clients Speak: A Report on Single-Window Government Services* est disponible et peut être consultée sur le site Internet de l'IAPC : www.ipaciapc.ca.

PRINCIPALES CONSTATATIONS :

Les clients sont satisfaits des services publics à guichet unique.

En général, plus de quatre sur cinq (81,7 %) clients étaient satisfaits des services offerts. Le degré de satisfaction allait de 85,1 % parmi les clients qui accédaient aux services offerts par un bureau provincial spécifique à 73,9 % parmi ceux qui accédaient aux services offerts par un bureau municipal en particulier.

L'utilisation d'un outil normalisé de mesure commune a permis d'estimer à 85,1 % la satisfaction des citoyens qui ont répondu et à 79,1 % celle des répondants d'entreprises. En réunissant les réponses des deux groupes, les services publics à guichet unique marquent un taux de satisfaction impressionnant de 81,7 %.

On attribuera en grande partie ce degré élevé de satisfaction à la proportion importante (60 %) de clients qui ont obtenu le service/l'information demandé(e) dès leur première visite et à la proportion élevée (69,7 %) de clients qui ont indiqué avoir obtenu leur service en moins de 30 minutes.

Plus d'efforts doivent être consacrés à servir la clientèle commerciale.

Une proportion sensiblement plus faible (51,6 %) des personnes qui ont répondu parmi la clientèle commerciale a reçu le service demandé après avoir consulté une première fois leur centre multiservices. Un nombre infime (moins de 2 %) des répondants ont indiqué que leur demande n'avait pas avancé (1 %), qu'elle avait été refusée (0,8 %), ou abandonnée (0,7 %). Cependant, les données suggèrent que, par rapport aux citoyens, une proportion plus élevée des répondants d'entreprises a dû retourner à son centre ou a été dirigée vers d'autres centres multiservices.

La plupart des clients utilisent encore le téléphone ou des déplacements comme voies de service.

Plus de trois-quart (83,8 %) des clients ont indiqué qu'ils obtenaient de préférence les services dont ils avaient besoin soit en se déplaçant (52,1 %) ou en téléphonant (31,7 %). Les résultats du sondage suggèrent que les citoyens et les entreprises utilisent des voies diverses pour accéder aux services gouvernementaux, y compris les voies électroniques (Internet, kiosques), personnelles (téléphone, déplacement) et autres (télécopieur, courrier postal). Un nombre moins important (10 %) de clients ont utilisé l'Internet comme voie initiale pour communiquer avec les centres multiservices du gouvernement.

Il n'y a pas de taille unique : différents clients utilisent différentes voies pour faire différentes choses.

Les données du sondage indiquent que chaque voie de service comprend une clientèle aux caractéristiques et aux attentes différentes. Par exemple, les clients d'Internet semblent avoir une meilleure éducation, mais une importante proportion des clients qui utilisent le téléphone (51,4 %) ou qui se déplacent (42 %) détiennent un diplôme collégial ou universitaire. La clientèle commerciale représente également une gamme variée d'industries et provient d'établissements commerciaux de différentes tailles.

Les services au comptoir sont très efficaces.

Dans l'ensemble, 60 % des clients ont obtenu satisfaction dès leur premier contact, mais le degré de satisfaction était différent selon la voie de service utilisée. Par exemple, 74 % des clients qui se sont rendus en personne au centre de services ont déclaré avoir obtenu les services demandés à leur première démarche. Une proportion beaucoup plus faible des clients qui ont téléphoné (37 %) a indiqué avoir obtenu des résultats semblables après leur contact initial.

En moyenne, les clients ont essayé d'accéder aux services gouvernementaux au moins 1,5 fois avant d'obtenir le service demandé ou d'abandonner leur tentative. En général, les répondants d'entreprises ont effectué un nombre plus élevé de contacts (1,6 contacts effectués) que les citoyens (1,4 contacts effectués) pour obtenir leur centre multiservices.

Le fait que la clientèle commerciale obtienne un succès plus limité dans un premier contact pour le service qu'elle demande peut être attribué à plusieurs raisons :

- les demandes de la clientèle commerciale sont plus diverses/compliquées (par ex., permis d'aménagement, demandes de prêts/subventions); et
- la clientèle commerciale est moins au courant des organismes qui dispensent les divers services qu'elle demande.

Le contact personnel est encore important.

Dans l'ensemble, les résultats du sondage suggèrent que le contact personnel avec les clients est nécessaire, étant donné que plus de 80 % de la clientèle a établi un contact avec le centre multiservices en se rendant directement au comptoir (52,1 %) ou en téléphonant (31,7 %). Moins que 12 % des clients ont accédé aux services par voie électronique (Internet, kiosque) dans un premier contact.

Les premiers contacts sont clés : la rapidité est appréciée.

L'analyse des données suggère un déclin marqué dans la satisfaction des clients lorsqu'ils sont référés à d'autres organismes/services. Par exemple, la satisfaction des clients passe de 87,6 % parmi ceux qui ont obtenu leurs services dès leur première demande à 24,1 % parmi ceux qui ont indiqué avoir été référés à d'autres organismes/services quatre fois. De même, parmi les clients qui ont reçu le service demandé en moins de 10 minutes, 92,3 % ont indiqué qu'ils étaient satisfaits du service. Parmi les personnes qui ont dû attendre plus de 31 jours pour obtenir leur service, une plus faible proportion (53,5 %) a indiqué avoir été satisfaite du service reçu.

La fidélité de la clientèle est la plus élevée avec l'Internet.

Afin de mesurer la satisfaction de la clientèle pour un service particulier, on examinera la proportion de clients qui ont indiqué vouloir à nouveau utiliser la même voie de service. L'analyse des données indique que la « fidélité » à une voie de service varie, montrant un taux élevé de 78,3 % parmi les personnes qui accèdent pour la première fois aux services par l'Internet à un taux plus faible de 41,7 % parmi les personnes qui accèdent pour la première fois à leur service par courrier postal. En moyenne, 60 % des clients manifestent le désir d'utiliser la même voie de service pour leurs futurs besoins.

La plupart (pas tous!) des clients d'entreprises demande une prestation de service « en direct ».

Malgré la proportion relativement faible de la clientèle commerciale qui a soumis des renseignements (21,1 %) ou a effectué en direct (10,3 %) des paiements autres que ceux adressés à l'Agence des douanes et du revenu du gouvernement canadien, nombreuses entreprises étaient en faveur d'un plus grand nombre de services en direct. On notera que plus de la moitié (52,2 %) des répondants d'entreprises a appuyé l'adoption d'un modèle permettant de conduire toutes les affaires courantes ordinaires par le biais de l'Internet, mais environ un quart (23,2 %) de la clientèle d'entreprises n'a pas appuyé ce concept. Il convient de noter que la clientèle commerciale est très variée. Les besoins des petites et moyennes entreprises sont souvent très différents de ceux des grandes sociétés.

L'appui d'une stratégie multiservices est fort.

D'après les données du sondage, il y a un fort appui pour une plus grande intégration des services gouvernementaux. On a demandé aux répondants parmi les citoyens et la clientèle commerciale d'indiquer à quel point ils appuyaient l'intégration « transparente » des services publics offerts par les paliers de gouvernement municipal, provincial/territorial et fédéral. Par exemple, il y a eu un appui important de l'intégration des services gouvernementaux, étant donné que 79,6 % des répondants d'entreprises et 81,2 % des citoyens préféreraient des centres multiservices.

L'identification électronique trouve un appui.

Dans l'ensemble, un peu moins que les deux-tiers (60,6 %) de tous les répondants ont appuyé le concept d'une identification électronique pouvant permettre l'accès à une gamme de programmes et services gouvernementaux. Cependant, on notera que cet appui n'est pas uniforme dans les diverses strates du sondage : la clientèle commerciale appuyait plus le concept d'une identification (66,9 %) que les citoyens (54,1 %). De même, une proportion élevée (62,1 %) des clients commerciaux et individuels appuyait le concept d'une carte unique pouvant être utilisée dans multiples programmes gouvernementaux.

Ce sondage a été conduit avant le 11 septembre 2001. De ce fait, les points de vue des citoyens et des clients d'entreprises concernant l'identification électronique et/ou les questions de sécurité pourraient être sensiblement différents des résultats présentés dans ce rapport.



INTRODUCTION

Highlighted in this report are the key findings of a national survey of citizens who, and businesses that, accessed single-window services provided by municipal, provincial and/or federal organizations.

The mandate of the research encompasses an examination of client satisfaction with existing processes and provides direction(s) for the design and delivery of future services.

Clients Speak: A Report on Single-Window Government Services was initiated by the Institute of Public Administration of Canada (IPAC) with the participation of eleven municipal, provincial/territorial and/or federal government departments and organizations responsible for the provision of information, programs and services to citizens and/or business organizations.

The Institute of Public Administration of Canada contracted with R.A. Malatest & Associates Ltd. to undertake a major national study of business and citizen clients of various government single-window services. The essence of the single-window approach is the bringing together of government services, or information about them, in order to reduce the amount of time and effort clients must expend to find and obtain the services they want.¹

To assess current satisfaction with the services that were surveyed, as well as develop a set of "best practices" in the provision of single-window services, this study measured client satisfaction with services and the use of individual channels and examined the relationship between the channels. The opinions of citizen and business respondents about the future direction(s) of government single-window services were also sought.

The mandate of this research was to

- assess the reasons why citizens and businesses typically access government services;
- determine the pattern of use of the various channels offered by single-window services (walk-in, telephone, Internet, other) through which citizens and businesses access government services;
- define satisfaction with single-window services and identify what factors contribute to satisfaction and/or dissatisfaction with the accessed services; and
- identify citizen/business preferences as to how such services could best be provided.

A key objective of this project was to identify best practices in the provision of single-window services: to define what works well and how single-window services could be enhanced for both citizen and business clients.

¹Stephen Bent, Kenneth Kernaghan and D. Brian Marson, *Innovation and Good Practices in Single Windows* (Ottawa: Canadian Centre for Management Development, 1999).

Chapter 1. The Research Process

This national survey was completed with more than 4,800 citizen and business clients.

The survey was national in scope and was based on the responses provided by more than 4,800 individuals who participated in a telephone interview. Research participants were either citizen or business clients who accessed government single-window services provided by one of the following organizations (readers are directed to **Appendix A. Organization Descriptions**):

- Canada Business Service Centres (Industry Canada)
- Service Canada
- British Columbia's Government Agents
- Ontario Business Connects
- Ontario Government Information Centres
- Service New Brunswick
- Government of the Northwest Territories
- Service Nova Scotia and Municipal Relations
- Region of Halton, Ontario
- Enterprise Toronto
- City of Vancouver

Two separate but related surveys were administered depending on the particular "group" with which the individual was affiliated:

"Citizens" – those individuals who accessed a government single-window service for non-business or personal reasons. Typically, such individuals would access services to obtain information or for the purposes of completing an application.

"Business" – those individuals or organizations that accessed a government single-window service primarily for business-related reasons such as business registration, obtaining business licenses and requesting business information.

Identification of clients as "citizens" or "business" was provided by each of the eleven participating public-sector organizations.

A key element of the study was to determine what channel(s) clients used to access government services and the relationships between channels used and satisfaction with service received.

A citizen survey and a business survey were administered based on the affiliation specified by each participating government organization.

"Service channels" include

- walk-in
- telephone
- Internet
- other (kiosk, fax, mail, other)

It should be noted that clients might have used more than one service channel when accessing government programs and services.

1.1 Data "Weighting"

Initially, to ensure that each organization and region received an equal "weight" in the final sample, a target of 400 completions per organization was established. However, due to the requirements of Service New Brunswick to obtain additional information with respect to each channel, there were more than 1,400 surveys completed for Service New Brunswick. To ensure that Service New Brunswick surveys did not represent a disproportionate share in the national totals, data from Service New Brunswick citizen surveys were adjusted by a survey weight of 0.3 which, in effect, reduced the weight of Service New Brunswick to be equivalent to that of the other participating organizations. Weighting procedures were not required for any other organization or jurisdiction, nor was weighting required for the business sample. As a result of weighting, the "weighted" responses for the citizen sample will be 1,871 rather than 2,885.

1.2 Survey Response

The survey was piloted with a sample of 48 citizen and business clients in May 2001. Full survey administration was undertaken between June 2001 and August 2001. Highlighted in Table 1-1 are the results of survey administration by survey type. Readers may refer to **Appendix B** for levels of survey response by organization and to **Appendix C** for a discussion of the research caveats associated with this survey.

Table 1-1
Response Rates – by Survey Type

Group	Number Received	NIS**	Non-Qualifier	Valid Sample	Refusals*	Total Surveys	Response Rate (Valid)
Business	3,534	358	193	2,983	455	1,921	64.4%
Citizen	4,651	501	286	3,864	519	2,885	74.7%
Total	8,185	859	479	6,847	974	4,806	70.2%

* Businesses or individuals preferring not to participate.

** Not-in-service numbers

Data weighting was required to adjust for some regional over-sampling of the citizen survey.

Survey administration was undertaken from June 2001 to August 2001.

This survey is characterized by a high valid response rate of 70.2%.

As highlighted in the table, the Consultant secured very high response rates for both the citizen and business surveys. Data was obtained for 2,885 citizens, representing a valid response rate of 74.7% and for 1,921 businesses, representing a valid response rate of 64.4%. The total response rate is, therefore, 70.2%.

1.3 Use of Common Measurements Tool (CMT) Rating Scale

This Report uses a client satisfaction scale developed in 1998 by the Canadian Centre for Management Development, in partnership with several provincial and municipal governments, and adopted by the Treasury Board of Canada in 2000 as the common way to measure and benchmark client-satisfaction results across federal government departments and agencies.² The Common Measurements Tool (CMT) scale entails the conversion of a 5-point rating scale into a single common satisfaction measure. Use of the CMT allows for comparison of the results of this survey to other research completed by governments and agencies using the CMT questions and scales.

When applicable, results have been reported using the Common Measurements Tool (CMT) approach.

² n.a., *A How-to Guide for the Service Improvement Initiative* (Ottawa: Treasury Board of Canada Secretariat, 2001).

Chapter 2. Who are the Clients?

Numerous questions were asked regarding the social, economic and demographic characteristics of citizen and business respondents. Such questions provide important information as to the “profile” of clients who utilized different service channels when first accessing the surveyed government programs and/or services (please refer to **Chapter 6. Client Profiles** for further information).

2.1 Citizen Characteristics

As highlighted in Table 2-1, the majority (65.4%) of citizen respondents were between the ages of 35 and 64 years, with almost one-half (49.9%) indicating that they had completed a college or university program. Analysis of the data also yields some interesting insights as to the characteristics of the various channels used:

- Females were almost twice as likely to use a telephone service as were male respondents – male clients tended to prefer walk-in, Internet and/or other channels.
- Walk-in services were the most accessed service channel, especially by those respondents who had none or little formal education.
- Internet clients tended to be between the ages of 25 to 49 years of age – very few individuals 65 years of age or older (2.7%) utilized the Internet when first accessing government services.
- More than 85% of clients who accessed government services via the Internet had some post-secondary education (had completed some or all of a college/university program). In comparison, a significant proportion of walk-in (14.8%) or other service channel clients (12.6%) had not completed high school.
- It is interesting to note that the proportion of visible minorities and disabled clients who utilized "other" channels (primarily mail or fax services) is markedly higher than that of other channels. For example, while visible-minority respondents represented 6.3% of the total sample, such clients account for 14.3% of all clients who utilized "other" channels. Similarly, the use of other channels among disabled clients (16.9%) is higher than that of their share of the citizen sample (9.1%). Above-average utilization of mail/fax channels by visible minorities and disabled clients could suggest that such clients experience barriers (language, physical, other) in accessing single-window services using traditional (telephone, walk-in) channels.

In order to have populations of sufficient size to develop citizen characteristics for each channel, data in Table 2-1 is based on unweighted data.

65.4% of citizen respondents were between 35 and 64 years of age, and 49.9% indicated they had completed a college or university program.

Disabled and visible minority clients may be experiencing some "barriers" in accessing single-window services via traditional telephone or walk-in channels.

Table 2-1
Citizen Respondent Characteristics – by Service Channel First Used

Group/Channel	Telephone	Walk-in	Internet	Other ¹	Total
Service Size	1,107	1,284	375	119	2,885
Gender:					
Male	37.9%	45.7%	53.3%	55.5%	44.1%
Female	62.1%	54.3%	46.7%	44.5%	55.9%
Age:					
Less than 25 years	6.0%	7.1%	7.7%	4.2%	6.7%
25 to 34	17.9%	18.3%	24.8%	12.6%	18.8%
35 to 49	39.7%	38.6%	44.8%	42.9%	40.0%
50 to 64	26.2%	26.4%	20.0%	24.4%	25.4%
65 or older	9.7%	9.1%	2.7%	15.1%	8.7%
Equity Group Status:					
Aboriginal	3.2%	5.9%	1.9%	5.1%	4.3%
Visible Minority	6.2%	6.3%	4.1%	14.3%	6.3%
Disabled	9.0%	9.1%	6.7%	16.9%	9.1%
Formal Education:					
Some public or high school	7.8%	14.8%	2.9%	12.6%	10.5%
Completed high school	20.9%	25.1%	9.6%	23.5%	21.4%
Some post-secondary	18.0%	18.1%	16.0%	11.8%	17.5%
Completed college/university	52.8%	41.4%	71.5%	47.9%	49.9%
Don't know/no response	0.6%	0.6%	--	4.2%	0.7%
Household Income:					
under \$20,000	10.2%	13.0%	3.5%	14.3%	10.8%
\$20,000 to \$29,999	9.2%	11.6%	6.9%	10.1%	10.0%
\$30,000 to \$49,999	19.5%	23.0%	16.0%	25.2%	20.8%
\$50,000 to 69,999	14.8%	16.9%	23.5%	11.8%	16.7%
\$70,000 +	26.6%	16.8%	37.8%	18.5%	23.4%
Don't know/no response	19.7%	18.7%	12.3%	20.2%	18.3%

n=2,885 (unweighted)

¹ includes mail, fax, kiosk, etc.

Note: Totals may not add to 100% due to rounding

Service Lesson:

Service providers need to identify the specific characteristics of their clients who access services via walk-in, telephone or Internet channels.

There are significant differences in the client socio-demographic profile on the basis of the channel first accessed.

Companies with fewer than 5 employees were more likely to use walk-in/telephone services than were larger companies.

2.2 Business Characteristics

Detailed in Table 2-2, a majority (76.8%) of business respondents had between 1 and 4 employees working at their establishment and were within the following three major industry sectors: construction, professional services and retail trade. Approximately 80% of business respondents state that their first contact was through walk-in or telephone service(s). Review of the data yields the following characteristics of the various channels used:

- Business clients come from small businesses (those with fewer than 5 employees).
- Business clients from small businesses were more likely to use walk-in (78.1%) and telephone (75.7%) services than were those business clients who worked in larger companies.
- Internet clients tended to be those respondents who employed 1 to 4 individuals within their organization (85.1%) and were primarily in the professional service (19.8%) or personal service (14.9%) industries.
- Other-service channel (kiosks, fax, mail, etc.) clients were represented by those respondents within the construction (16.7%), retail trade (15.9%) and professional services (13%) industry.

**Table 2-2
Business Characteristics – by Service Channel Used First**

Group/Channel	Telephone	Walk-in	Internet	Other ¹	Total
Service Size	556	1,025	202	138	1,921
Number of Employees:					
1 to 4	75.7%	78.1%	85.1%	59.4%	76.8%
5 to 19	13.5%	11.5%	8.4%	17.4%	12.2%
20 to 99	3.4%	3.9%	1.5%	16.7%	4.4%
100 to 500	1.8%	1.1%	1.0%	1.4%	1.3%
More than 500	0.2%	0.2%	--	--	0.2%
Don't Know/No Response	5.4%	5.2%	4.0%	5.1%	5.1%
Type of Business:					
Accommodation, food	6.6%	4.8%	2.0%	2.2%	4.8%
Agriculture	0.4%	0.8%	1.0%	2.2%	0.8%
Communication, utilities	2.0%	2.1%	2.0%	4.3%	2.2%
Construction	10.8%	21.1%	9.4%	16.7%	16.5%
Finance, Insurance, real estate	4.5%	3.1%	4.5%	2.9%	3.6%
Manufacturing, processing	4.1%	4.4%	5.4%	2.9%	4.3%
Personal services	13.6%	10.6%	14.9%	7.2%	11.7%
Professional services	12.6%	11.8%	19.8%	13.0%	12.9%
Resources: forestry/fishing/mining	0.7%	1.0%	--	1.4%	0.8%
Retail	14.4%	12.2%	9.9%	15.9%	12.8%
Transportation	3.4%	3.6%	3.5%	3.6%	3.5%
Wholesale	3.1%	2.2%	2.5%	5.1%	2.7%
Education	--	0.3%	1.5%	0.7%	0.4%
Health services	1.8%	1.2%	1.5%	2.2%	1.5%
Other public sector	0.5%	1.2%	--	--	0.8%
All non-profit organizations	1.4%	1.2%	1.0%	0.7%	1.2%
Other	15.3%	13.9%	17.8%	13.8%	14.7%
Don't Know/No Response	4.8%	4.6%	3.5%	5.8%	4.7%

n=1,921 (unweighted)

¹ includes mail, fax, kiosk, etc.

Note: Totals may not add to 100% due to rounding.

Service Lesson:

Service providers must understand the specific "small business" profile of their business clients and tailor programs/services to meet the needs of small business.

2.3 Client Characteristics – Implications for Service Delivery

A review of the demographic characteristics of the citizen and business sample yields several important implications for service delivery:

1. Different clients have different needs and are comfortable with different channels.

There are considerable differences in the socio-demographic profile of clients for each service channel. Analysis of the demographic profile suggests that it will be difficult to offer only electronic service channels, as clients may not have the literacy/technical capabilities to access services on-line.

Service providers should develop programs and service-delivery strategies with an understanding of the socio-demographic profile of the various citizen/business client populations. Further research may be required to specifically identify what programs/services should be provided through each service channel.

2. Some clients are experiencing various degrees of inconvenience in accessing government services.

The relatively high proportion of disabled/visible-minority clients who access government services using mail/fax or other channels may suggest that for these clients utilizing personal contact (walk-in, telephone) or Internet channels might be problematic. It may be necessary for government service providers to examine the provision of services to ensure that service delivery accommodates the needs of the disabled and visible minorities.

Service Lesson:

Visible minorities and disabled clients may be experiencing barriers in terms of language, access and/or customs. Service providers should ensure that such groups can be accommodated through both traditional and non-traditional service channels.

3. Recognize “small business” element of business clients.

More than three-quarters (76.8%) of business clients accessing government service centres are from organizations that employ fewer than five individuals. Therefore, service providers should be cognizant of the issues that concern small business.

In general, service providers should ensure that programs/service-delivery strategies are aligned to the needs of small business, particularly in the areas of

- business registration;
- provision of licenses, permits, applications; and
- information on employment, operations and regulations.

Chapter 3. Use of Specific Channels

Citizen and business respondents were asked a series of questions pertaining to their reasons for accessing the single-window government service(s), their service requirements and the channel they used.

3.1 Reasons for Accessing Services

For the purposes of this report the Consultant has categorized the open-ended responses to the reasons for accessing government organizations into the following broad categories:

- Registration – includes those individuals who accessed services for the purpose of registration, filing or application processes such as a new business registration, vehicle registration, applications for permits, ID applications, etc.
- Information – includes respondents who accessed services to obtain some type of information such as government contact information, labour law information, health or medical information, etc.
- Filing documents – includes respondents who access services to file documents such as taxes.
- Health services – includes respondents who were contacting the organization for specific health services such as medical care.
- Other – this includes accessing services for training, employment, or any other reason.

Respondents provided various reasons for accessing government organizations. As detailed in Table 3-1A, more than 60% of all respondents contacted their government single-window organization for the purposes of registration.

Table 3-1A
Reason for Contacting Government Single-Window Service
by Group

Reason	Business	Citizen	Total
Business Registration	87.6%	8.6%	48.6%
Citizen Registration	4.5%	35.9%	20.0%
Business Information	10.5%	8.0%	9.3%
General Registration	6.8%	8.1%	7.4%
General Information	4.1%	10.8%	7.4%
Filing Documents	0.1%	10.4%	5.2%
Citizen Information	2.7%	7.6%	5.1%
Financial Assistance	0.4%	7.0%	3.6%
Health Services	0.2%	5.6%	2.9%
Other	12.6%	19.2%	16.1%

n=1,921 Businesses (unweighted) and n=1,871 Citizens (weighted)
 Note: Total will add to more than 100% due to multiple response.

Business clients (87.6%) and citizen clients (35.9%) state that their primary reason for contacting the government single-window service was for registration purposes.

As highlighted in Table 3-1B, it appears that while the Internet was utilized to obtain general information, significant proportions of clients note that they used walk-in channels for the purposes of registration and/or to file documents.

Table 3-1B
Reason for Contacting Government Single-Window Service
by Channel

Reason	Telephone	Walk-in	Internet	Other
Business Registration	40.6%	51.7%	58.3%	2.9%
Citizen Registration	21.2%	20.7%	6.5%	2.3%
Business Information	10.5%	8.1%	14.6%	2.6%
General Registration	6.5%	7.6%	8.0%	8.1%
General Information	9.2%	5.7%	12.4%	5.5%
Filing Documents	1.4%	8.1%	1.1%	1.8%
Citizen Information	5.6%	4.9%	6.5%	7.1%
Financial Assistance	6.5%	2.2%	1.3%	8.0%
Health Services	6.3%	1.2%	0.2%	5.5%
Other	17.4%	15.4%	10.1%	6.5%

n=3,792 (weighted)
 Note: Total will add to more than 100% due to multiple response.

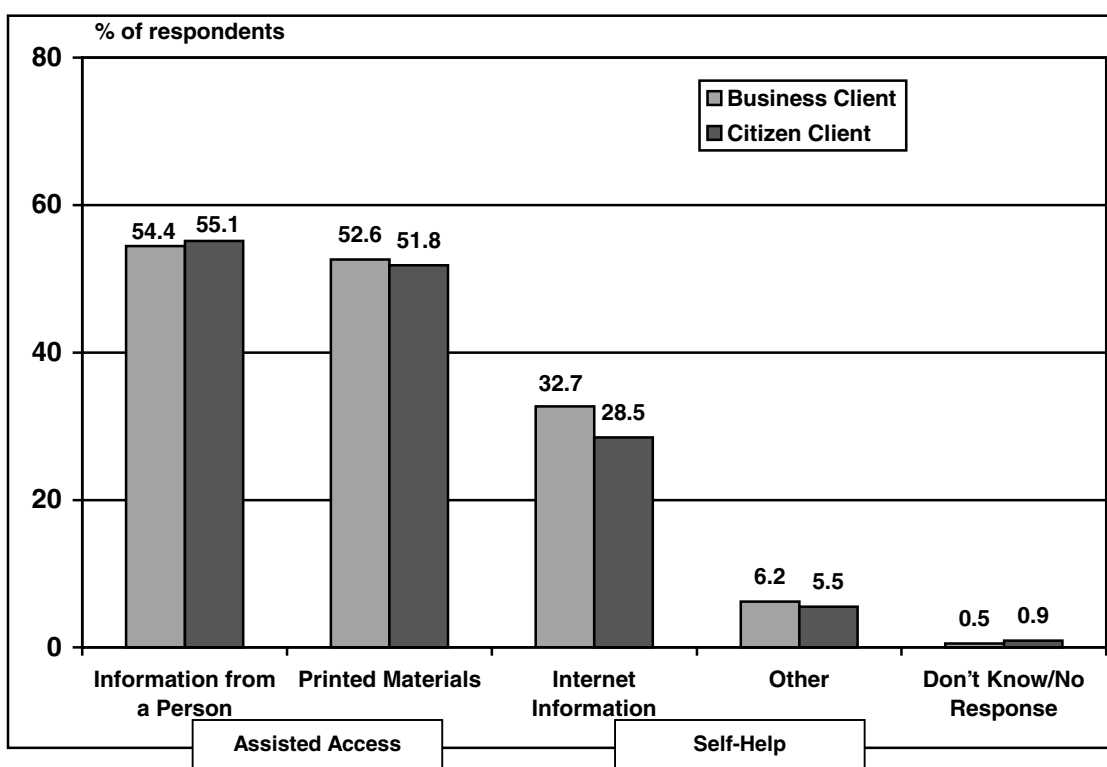
Service Lesson:

The Internet offers a method to provide information to clients, but walk-in and telephone channels are still required for registration and document-filing purposes.

3.2 Service Requirements

43.2% of citizen clients and 41.1% of business clients state that they required information from government. Detailed in Chart 3-2A is the type/source of information required.

Chart 3-2A
Accessing Information: Self Help vs. Assisted Access,
by Respondent Group



n=789 Businesses (unweighted) and n=956 Citizens (weighted)

*Printed material represents information that was obtained not using the Internet such as brochures and pamphlets.

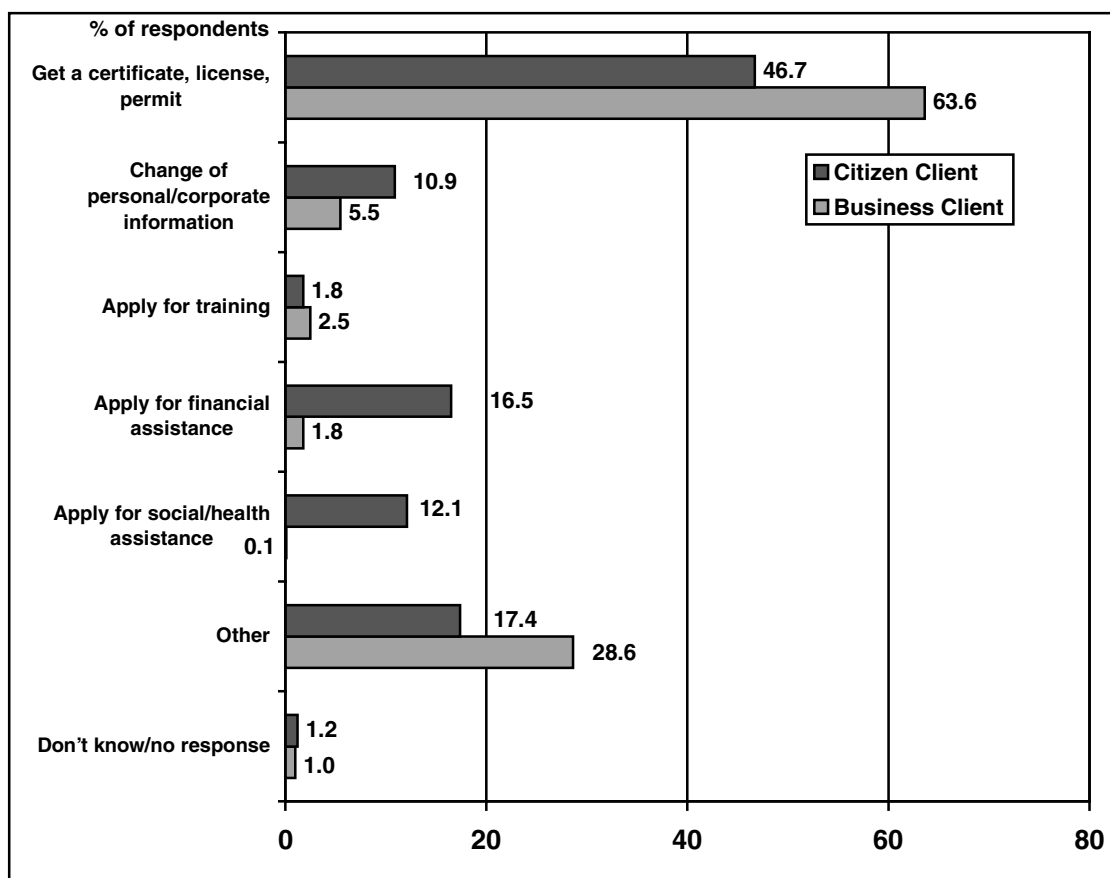
Note: Totals will add to more than 100% due to multiple response.

Both citizen and business clients were asked whether they needed to complete a registration/application form to obtain their service. More than two-thirds (77.2%) of business respondents, as compared to 37.9% of citizens, had to complete a registration/application form. Overall, 58.1% of all respondents who were required to complete a registration/application form did so to obtain a certificate, license or permit. Outlined in Chart 3-2B are the types of registration or application forms that were required.

Over 40% of business and citizen clients required information from government.

Whereas most business respondents (77.2%) note that they had to complete a registration/application form as part of their service, only a low proportion of citizen clients (37.9%) were required to complete an application.

Chart 3-2B
Type of Registration/Application Required,
by Respondent Group



n=1,483 Businesses (unweighted) and n=709 Citizens (weighted)
 Note: Totals will add to more than 100% due to multiple response.

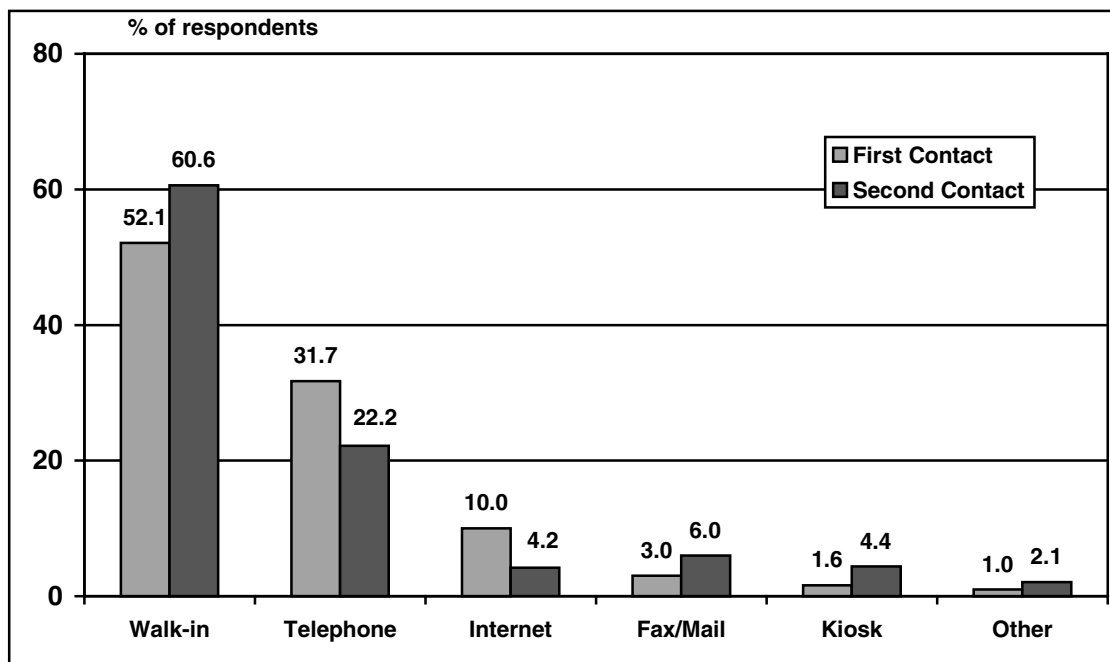
Respondents were also asked whether payment was required for the service received. Although only 49.3% of citizen clients were required to make a payment, 80.9% of business clients paid for services received.

3.3 Access to Services by Specific Channels

As highlighted in Chart 3-3A, the majority of respondents note that their *first contact* with government was via walk-in (cited by 52.1% of respondents), telephone (31.7%) and by Internet (10%) channels. In addition, it appears that after initial contact, many individuals were required to visit their particular government office as part of their second contact.

Most individuals accessing government single-window services for the first time used telephone, walk-in, and, to a limited extent, Internet services.

Chart 3-3A
First and Second Contact with Government Services,
Business and Citizen Sample



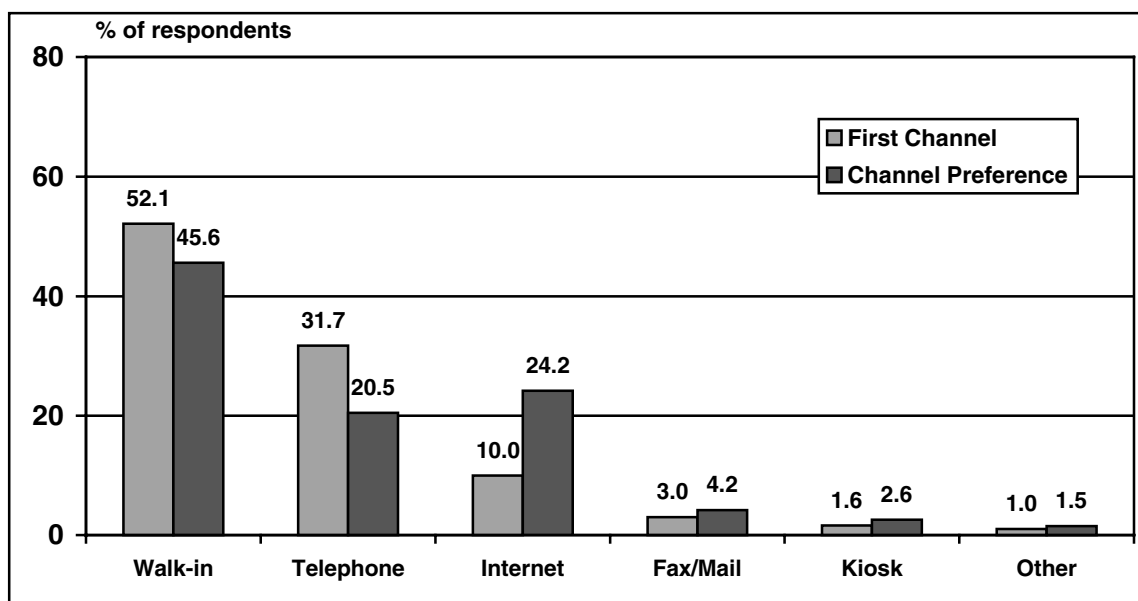
n=3,792 for first contact (weighted), n=1,371 for the second contact (weighted)

Note: Totals will not add to 100% due to no response categories not presented. Due to small sample size, data for kiosks should be interpreted with caution.

Relative to their first channel used, a significant proportion of clients would prefer to use a different channel for future requirements.

As detailed in Chart 3-3B, although the majority of respondents used walk-in (52.1%) or telephone (31.7%) services for their first contact with government, when asked what channel they would prefer in the future, the data show a decline in walk-in (-6.5%) and telephone services (-11.2%). Internet services increased by 14.2%; therefore, although fewer respondents did not use Internet services on their first contact, they would prefer to use this channel in the future. Additional information pertaining to future service channel preferences is provided in **Chapter 4** of this report.

Chart 3-3B
First Contact with Government Services,
by Future Channel Preference



n=3,792 (weighted)

Note: Totals will not add to 100% due to neutral and no response categories not presented.

Service Lesson:

Many clients believe that in the future they would prefer to access services via the Internet. However, almost two-thirds of clients would still want to access services through "personal" contact (walk-in or telephone services).

3.4 Service Outcomes

Although approximately 70% of citizen clients obtained their required service on initial contact, only 51.6% of business clients were able to secure required service on first contact.

Overall, when first contacting their single-window organizations, most citizens (68.7%) obtained the required service and were not referred to other branches. A markedly lower proportion (51.6%) of business respondents, however, received the required service as a result of their first contact with their organizations. As detailed in Table 3-4, very few (less than 2%) respondents note that their inquiry had resulted in a dead-end (1%), failure (0.8%), or an abandoned search (0.7%).

Table 3-4
Service Outcome – First Contact,
by Respondent Group

	Business	Citizen	Total
Service received	51.6%	68.7%	60.0%
Referred on within the branch	33.2%	17.0%	25.2%
Referred to different branch or government	2.9%	4.0%	3.4%
Dead-end – had to figure out next step on own	0.8%	1.2%	1.0%
Failure (no service available/ineligible)	0.4%	1.2%	0.8%
Abandoned search	0.4%	1.0%	0.7%
Other	8.2%	4.2%	6.2%
On-going/service not completed	2.1%	2.5%	2.3%
No response	0.3%	0.1%	0.2%

n= 1,921 Businesses (unweighted) and n=1,871 Citizens (weighted)

Service Lesson:

Service providers need to establish processes to better enable businesses to obtain their required service during their first contact.

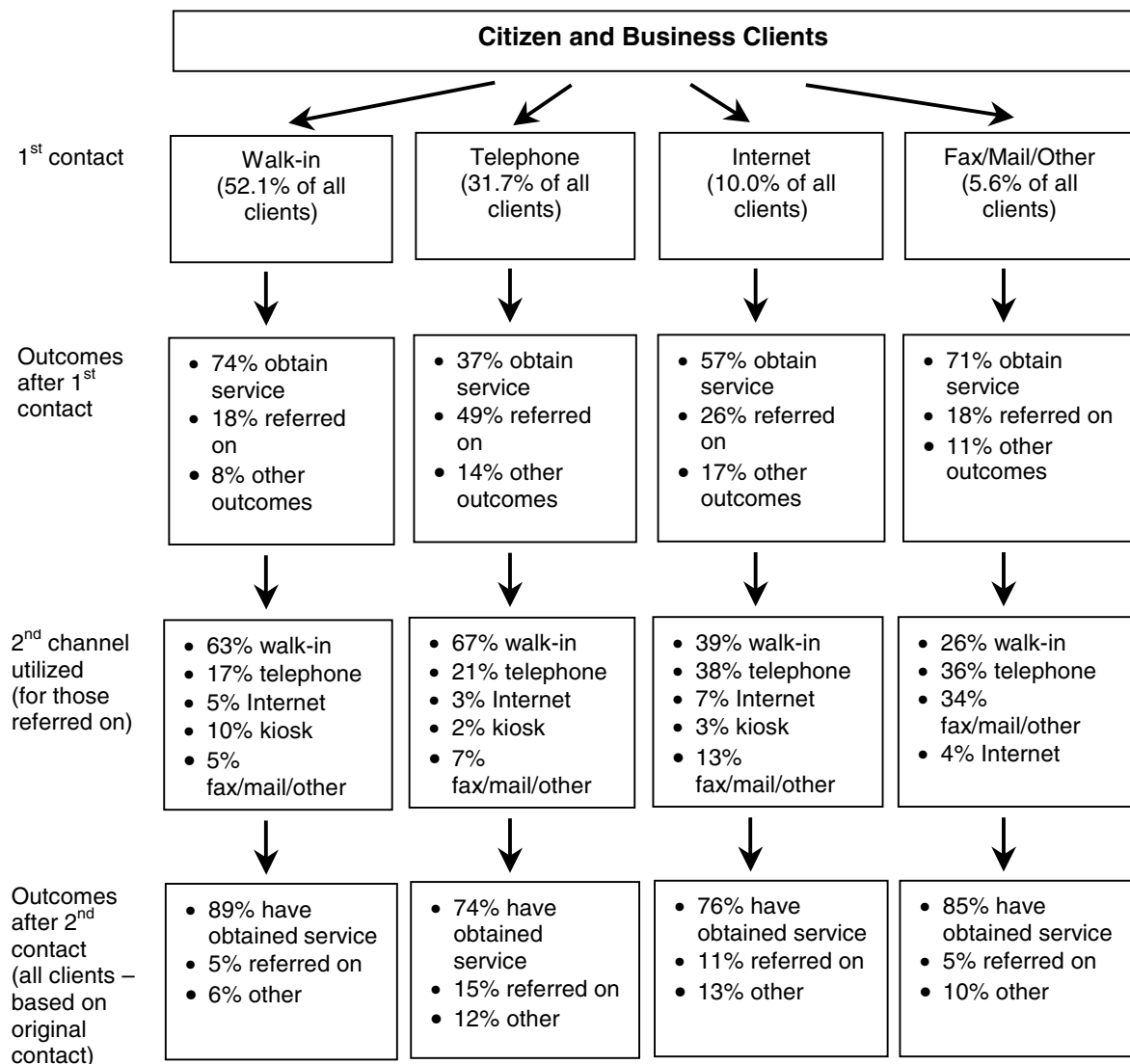
3.5 Tracing Client “Paths” in Accessing Government Services

An important element of this study was to trace the various paths utilized by citizen and business clients in accessing government services. These paths are illustrated in Chart 3-5.

Analysis of the data in Chart 3-5 yields some interesting observations:

- Clients who utilized walk-in (74%) or fax/mail/other (71%) channels for their first contact were most likely to report that they received the required service.
- A significantly lower proportion of individuals who first accessed government services through the Internet (57%) or telephone (37%) channels report that their needs were met after the first contact.
- Of those individuals who first used a telephone channel, and were then referred on, more than two-thirds (67%) note that they were required to access the government service in-person. A lower proportion of Internet (39%) or fax/mail/other (26%) were required to visit a government office to obtain service as part of their referral process.
- After the second referral, more than three-quarters of all individuals indicate that their service needs had been met.

**Chart 3-5
Service-Delivery Paths**



74% of walk-in clients report that they obtained the required service on their first contact. Only 37% of telephone clients report similar success.

The data presented in Chart 3-5 exemplifies the considerable crossover between service channels and also provides an indication of the likely paths that would characterize client activities. As detailed in the chart, it appears that telephone service serves as a precursor to walk-in services, since a significant proportion of telephone clients (32.8%) will be required to access services using walk-in channels.

Service Lesson:

Service providers must recognize and develop protocols that recognize the considerable crossover between service channels.

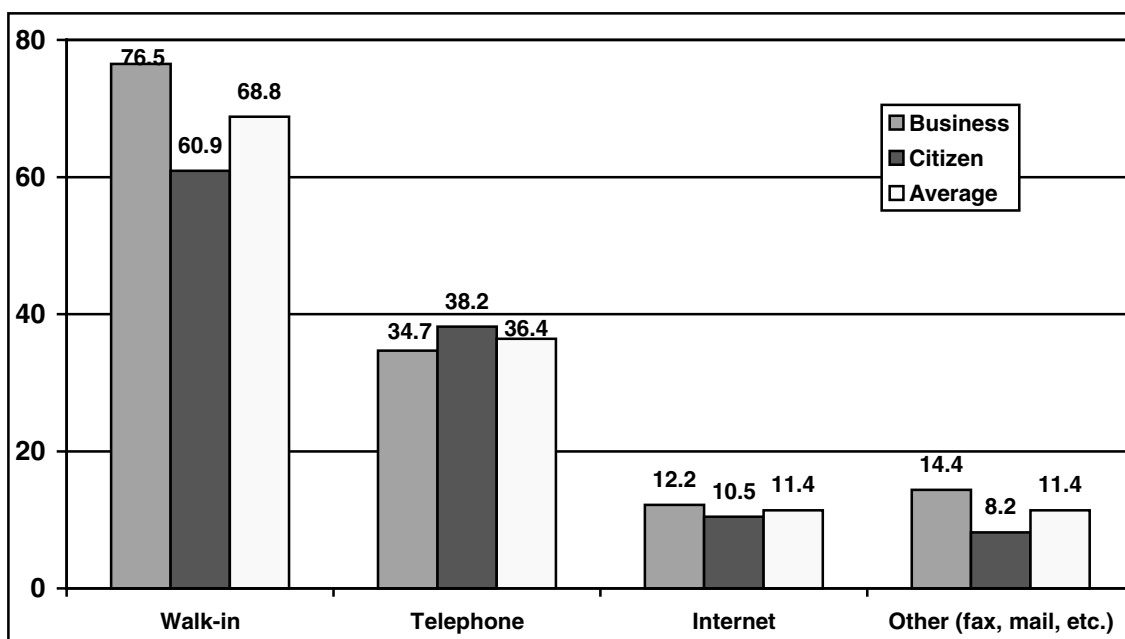
3.6 Analysis of Client Utilization of Various Service Channels

Clients accessed the surveyed government services 1.5 times before obtaining their required service.

On average, clients accessed the surveyed government services 1.5 times before they obtained the service and/or stopped trying. In general, business clients had more contact (1.6 contacts made) than had citizen clients (1.4 contacts made) with their government organizations.

In accessing services, clients often “moved” between different service channels. For example, as highlighted in Chart 3-6A, more than two-thirds (68.8%) of clients accessed the required services on a walk-in basis, and more than one-third (36.4%) utilized telephone services. As depicted in the chart, approximately one in ten (11.4%) respondents accessed services via the Internet.

Chart 3-6A
Business/Citizen “Exposure” to Service Channels
(% citing use of identified channel at least once)



n=1,921 Businesses (unweighted) and 1,871 Citizens (weighted)
Note: Totals will add to more than 100% due to multiple responses

To differentiate between the different channels used and satisfaction with each channel, respondents were asked to identify the steps required to receive service. Telephone and walk-in channels were the most popular means by which services were accessed throughout the process.

3.6.1 Channels Used by Business Clients

As outlined in Chart 3-6B, more than 50% of business clients used walk-in services on their first contact with their specific organization, and close to 30% used telephone services. Walk-in services increased by 12.6% for the second contact with the specific organization, whereas telephone services

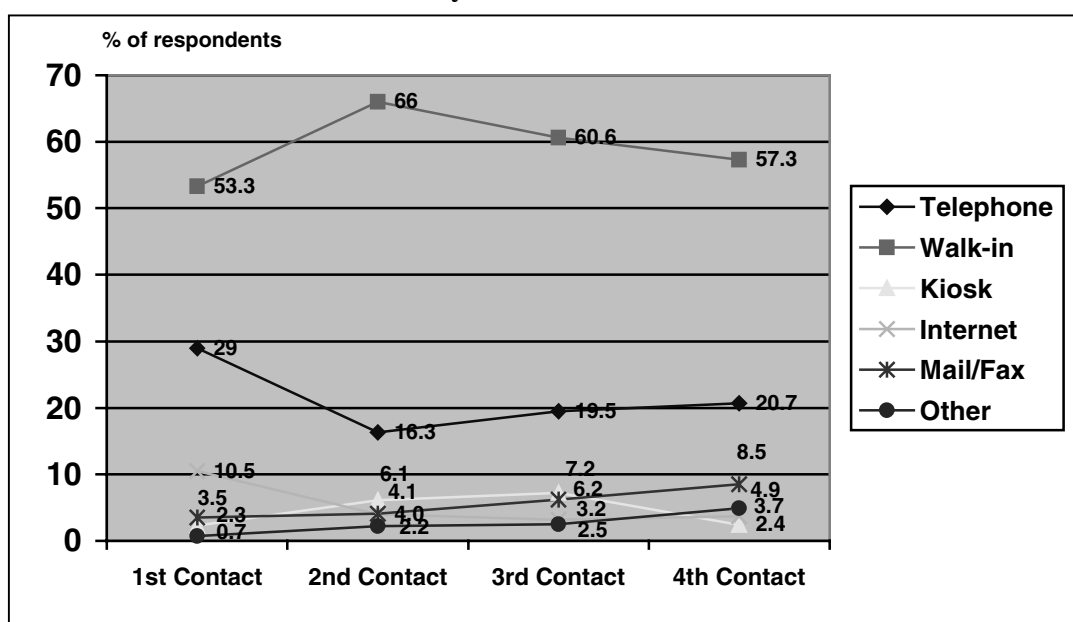
Many business respondents reported that they had to visit their government office after their initial telephone contact.

Fewer than 10% of business respondents used other channels (fax, mail, kiosks, etc.) within any contact.

declined by 12.6%. There appears to be a direct correlation between those respondents whose initial contact was by telephone and the increase in walk-in services for the second contact.

A slight increase in telephone services occurred in the third and fourth contacts, compared to a decrease in walk-in services. Although 10.5% of business clients used Internet services on their first contact, this channel was accessed less often in following contacts. Fewer than 10% of respondents used other channels (fax, mail, kiosks, etc.) within any contact.

Chart 3-6B
Business Channel Used,
by Contact



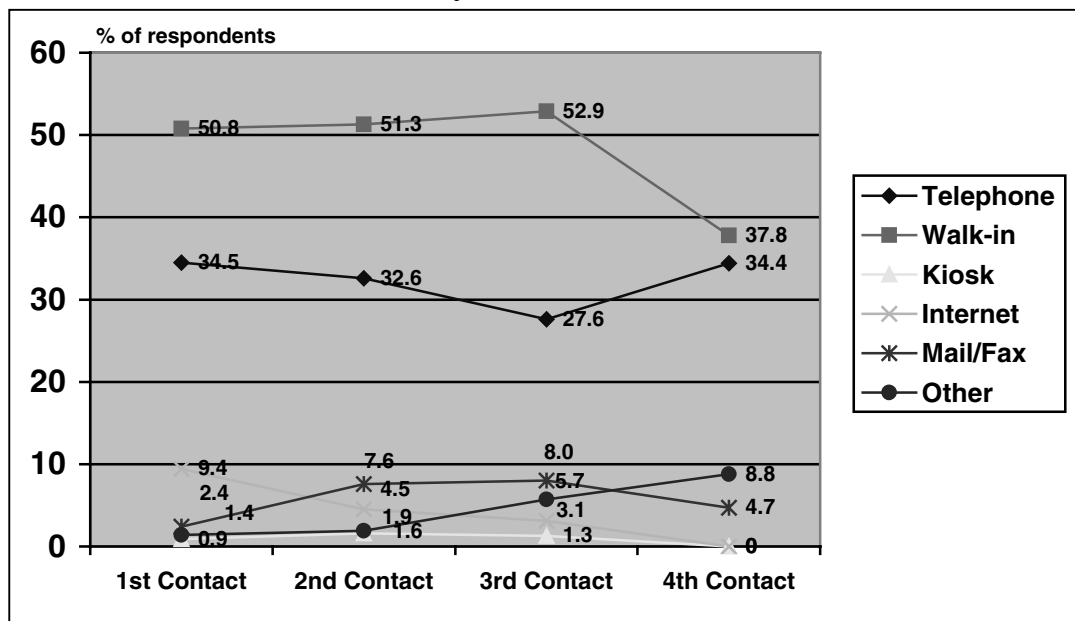
n=1,921 first contact, n=873 second contact, n=277 third contact, n=82 fourth contact (unweighted)

3.6.2 Channels Used by Citizen Clients

Outlined in Chart 3-6C are patterns of contact associated with each channel used by citizen clients. More than 50% of citizen clients used walk-in services, and 34.5% accessed telephone channels for their first contact with the government single-window organization. There was a slight decline in the latter for the second and third contact compared to a more than 6% increase for the fourth contact.

Although Internet services were initially used by 9.4% of respondents, these channels were accessed less frequently in following contacts. Fewer than 5% of citizen clients used other services (mail, fax, kiosk, etc.) when first contacting their government organization.

Chart 3-6C
Citizen Channel Used,
by Contact



n=1,871 first contact, n=498 second contact, n=158 third contact, n=49 fourth contact (weighted)

3.7 Citizen Use of New Channels

Citizen respondents were asked to comment on the extent to which they had utilized “new” (Internet, kiosk) channels to access government services. Respondents who had utilized such services were also asked to provide information as to the reasons for using their channels.

3.7.1 Kiosk Use

Citizen clients were asked whether they had used a government kiosk in the past, and 31.6% of all citizen respondents stated that they had used a government kiosk. Of those respondents who have accessed a kiosk 74.1% felt the kiosk was a good way of delivering services. The main reason respondents used a government kiosk was to find employment.

Many citizens who have used the Internet report that they had accessed government services via the Internet in the past.

3.7.2 Internet Use

Of all citizen respondents who have access to the Internet close to 50% stated that they have used the Internet to get government services. The majority of respondents (90.7%) who have accessed services via the Internet state that their computer skills are at the intermediate level or higher. In addition, those clients who spend more than half an hour a day using the Internet are more likely to use the Internet for government services. Table 3-7 outlines the top five services that were obtained using Internet services.

**Table 3-7
Top Five Services Obtained Via Internet,
Citizen Sample**

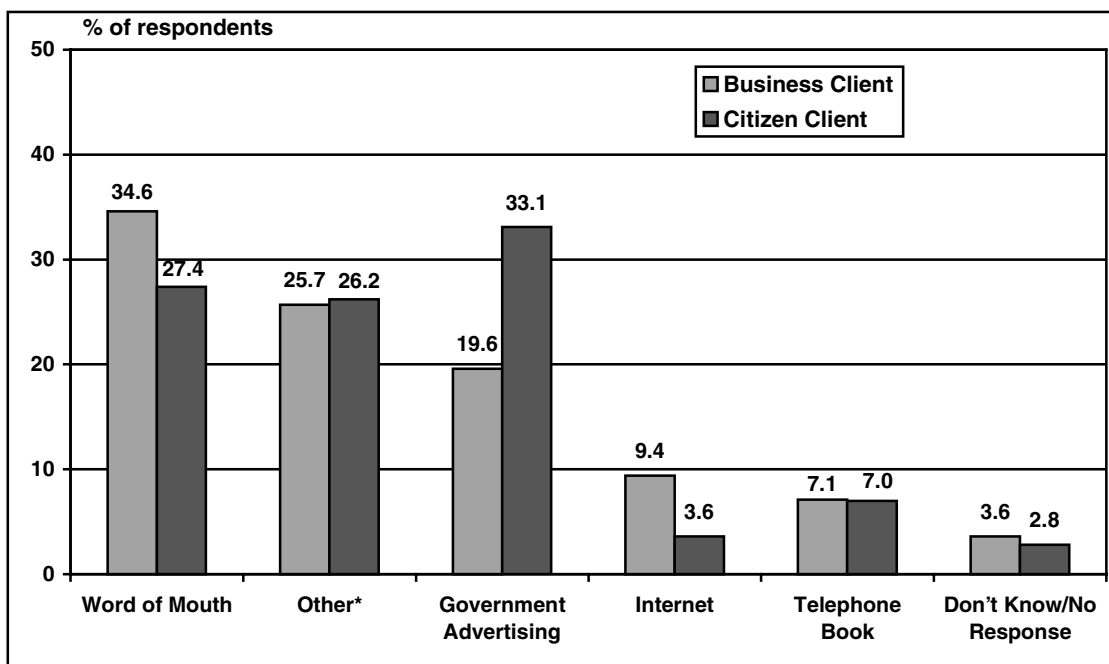
Service Obtained	Percentage
Job Search	16.4%
Information Search	12.0%
Vehicle Registration	8.0%
Revenue Canada Information	7.9%
Market Research/Business-Related Research	6.0%

3.8 Single-Window Service Awareness

“Word-of-mouth” was cited by 34.6% of business clients as the primary means by which they acquired knowledge of the government service they wished to access, while 33.1% of citizen clients identified government advertising as their primary source. A small percentage of business (7.1%) and citizen (7%) clients used the telephone book. Outlined in the following Chart 3-8A, are other ways citizen and business clients became aware of needed services.

Government advertising appears to be more effective for citizen clients than for business clients.

Chart 3-8A
How Clients Became Aware of Service(s) Available,
by Respondent Group



n=1,921 Businesses (unweighted) and n=1,871 Citizens (weighted)

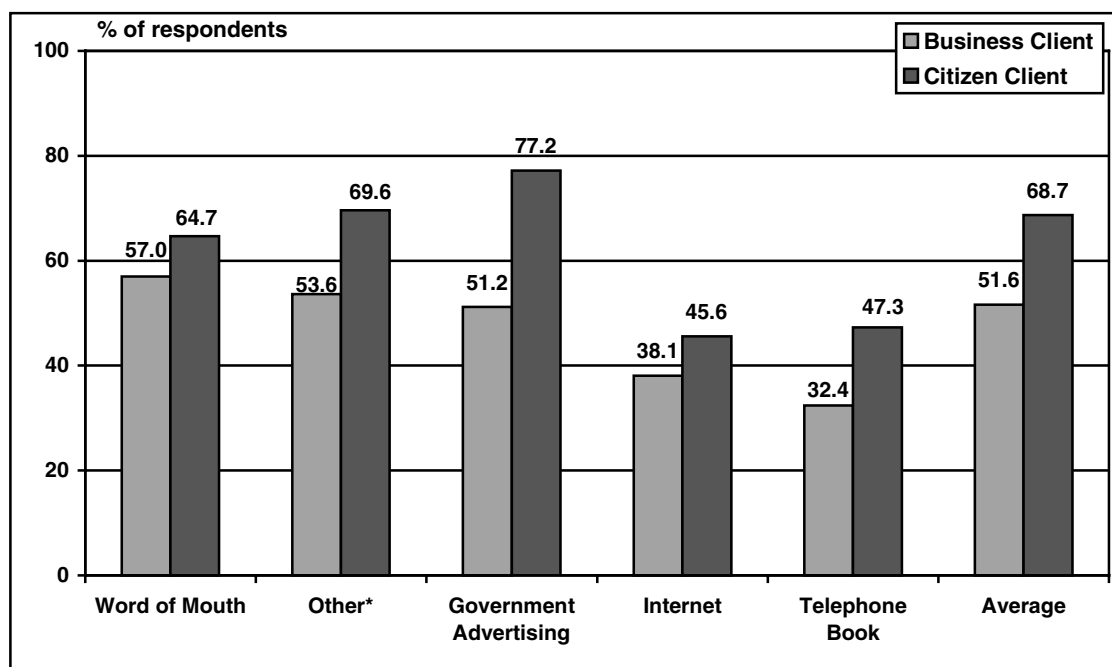
*other category includes information provided by other organizations, walked by office, etc.

In order to gauge the "effectiveness" of information sources, analysis was undertaken to identify the relationship between how clients first became aware of the service and the extent to which the client obtained the required service on their first contact. As highlighted in Chart 3-8B, several interesting observations emerged:

- There appears to be considerable divergence between citizen and business clients with respect to the effectiveness of government advertising. For example, where three-quarters (77.2%) of citizens who first became aware of the service via government advertising note that they obtained their required service on their first contact, only one-half of business clients who cited government advertising note that they obtained their required service on their first visit.
- Individuals (both citizen and business) who utilized the telephone directories and/or the Internet to find out about their required service were less likely to indicate that they received their required service upon their first visit.

Over 75% of citizens who became aware of the service by government advertising obtained their required service on the first contact.

Chart 3-8B
Clients Who Obtained Service on First Contact,
by Information Source – Business and Citizen Clients



n=1,921 Businesses (unweighted) and n=1,871 Citizens (weighted)

*other category includes information provided by other organizations, walked by office, etc.

Service Lesson:

Service providers need to review the effectiveness of government advertising – particularly with respect to communicating to business clients.

Service Lesson:

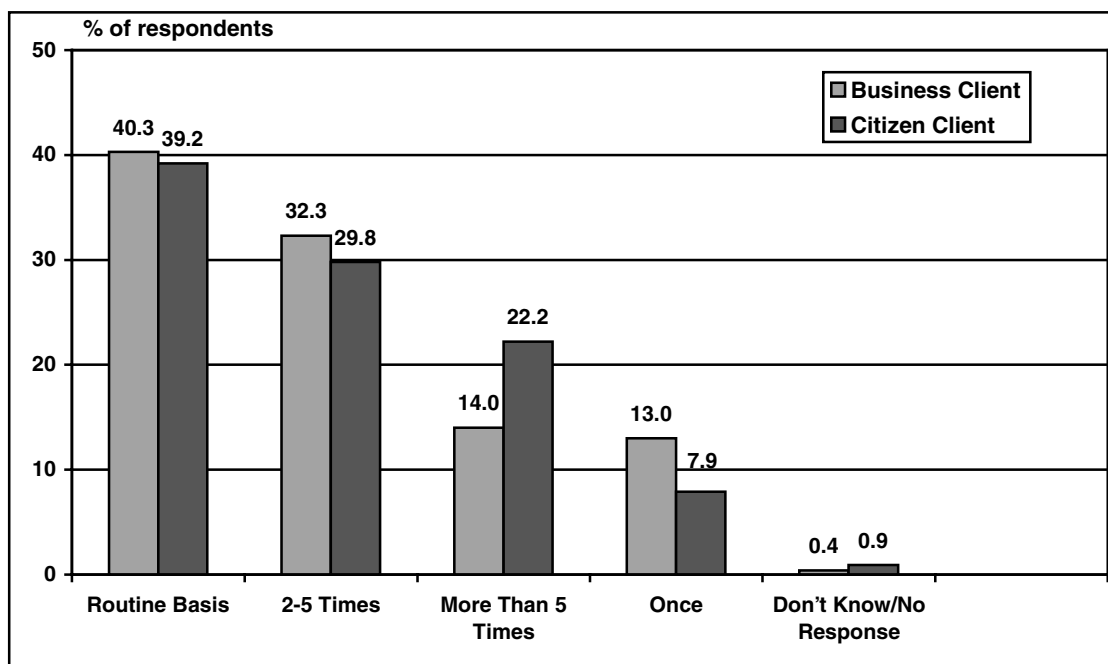
Given the low "success" of the Internet and telephone book in steering clients to the appropriate service provider, government should enhance the information provided through such channels.

3.9 Prior Organization Use

A significant proportion of citizen and business clients can be characterized as high-volume clients, in that they use the service on a routine basis.

More than one-half (52.7%) of citizen respondents had used the service organization before, compared to only 35.8% of business clients. Of those respondents who had used the organization previously, more than 70% have used the service 2 to 5 times, or use the service on a routine basis. Outlined in Chart 3-9 is the extent to which clients have used the service.

Chart 3-9
Past Service Use,
by Respondent Group



n=687 Businesses (unweighted) and n=987 Citizens (weighted)

3.10 Service Accessed – Implications for Service Delivery

Analysis of the channels used, services required and various client service paths can provide important information on the design and delivery of government single-window services. Key findings include the following:

1. Governments must continue to make provision for some “personal” contact with clients.

Overall, survey results suggest that there is a need for personal contact with clients, as more than 80% initially made contact with the organization through walk-in (52.1%) or telephone (31.7%) channels. Less than 12% of clients first accessed services via electronic (Internet, kiosk) channels.

Although a significant proportion (24.2%) of clients prefer to use the Internet for future services, two-thirds (66.1%) of clients would choose to access government services on a walk-in or telephone basis.

2. Walk-in services will be required due to the nature of citizen/business requirements.

Since a considerable proportion of citizen and business clients report that they accessed the single-window organization for the purpose of registration and/or filing of documents, it appears that it will be important to continue to provide such services on a walk-in basis. While the Internet represents an important service channel, until it can meet client filing/registration needs, in-person service provision will remain an important element in terms of government single-window services.

3. On first contact, governments are doing a good job providing required services to citizen clients but need to improve service to business clients.

Overall, more than two-thirds of citizens obtained their required service during their first contact with the government organization. However, among business clients, a much lower proportion (51.6%) obtained the required service as a result of their initial contact. This may imply that service organizations need to enhance their business services and/or undertake additional research to better understand the service requirements of their business customers. This may also reflect that the services that businesses are requesting may not be available in the selected channel that they first accessed.

4. Some scope to better target communications to business clients.

While a significant proportion of citizen clients (33.1%) became aware of the government service through government advertising, a lower proportion of business clients (19.6%) note the same. Lack of “official” information as to the type of services provided to business may partially explain the greater tendency for business clients *not* to obtain required service upon their initial visit.

Chapter 4. Customer Satisfaction with Single-Window Services

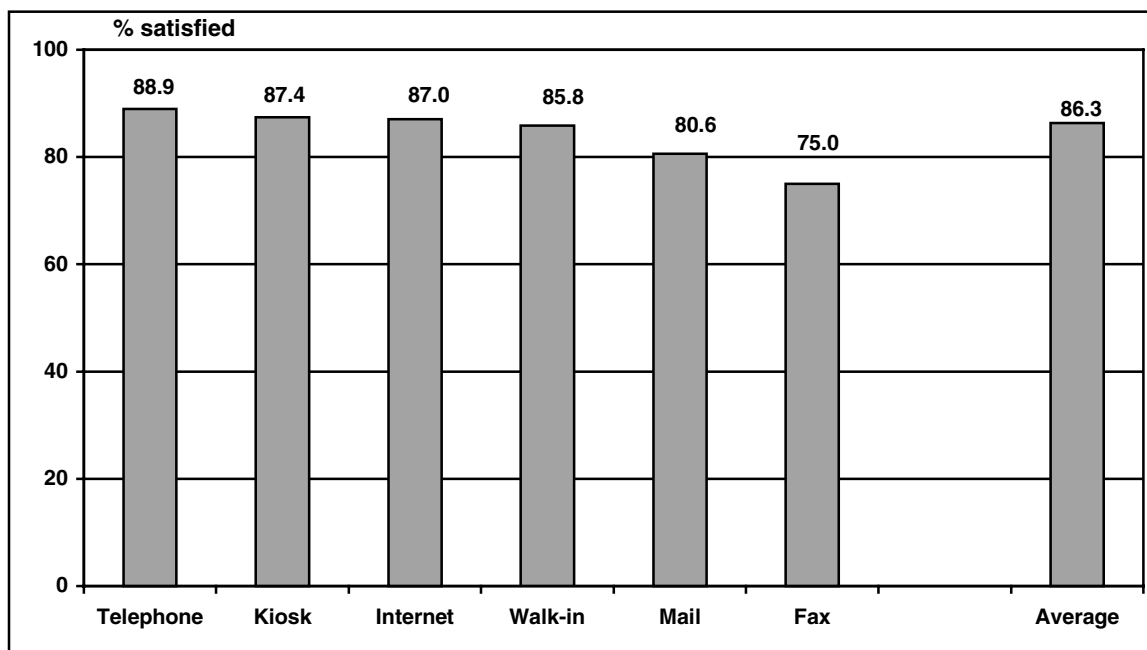
A key element in the study was to assess overall satisfaction with the channel selected and to identify reasons as to why clients were either satisfied or dissatisfied with their selected channel. Analysis of satisfaction with service channels is based on the first channel accessed by business and citizen clients.

4.1 Satisfaction with Service Received

As highlighted in Chart 4-1A, the majority (86.3%) of clients are satisfied with the service they received on first contact with the respective organization. In addition, the level of satisfaction ranges from a high of 88.9% (telephone service) to 75% for those who accessed their service by fax. Irrespective of the channel, if service is received on first contact there is a high level of satisfaction.

Overall, the majority (86.3%) of respondents are satisfied with the services received.

Chart 4-1A
Respondent Satisfaction with Service Received*
(for Those Who Obtained a Service on Their First Contact),
by First Channel



n = 2,277 (weighted), only those respondents where their service was received and completed on the first contact.

*Common Measurements Tool Scale

Service Lesson:

Irrespective of the channel accessed almost all clients who receive service on their first contact tend to be satisfied with their overall experience with the organization; therefore, service-delivery improvements should be focused around completion of service upon first contact.

As highlighted in Table 4-1, citizen respondents (89.5%) were slightly more satisfied with the service received than were business respondents (82.1%).

Table 4-1
Business and Citizen Satisfaction with Service Received*
for Those Obtaining Service in their First Contact

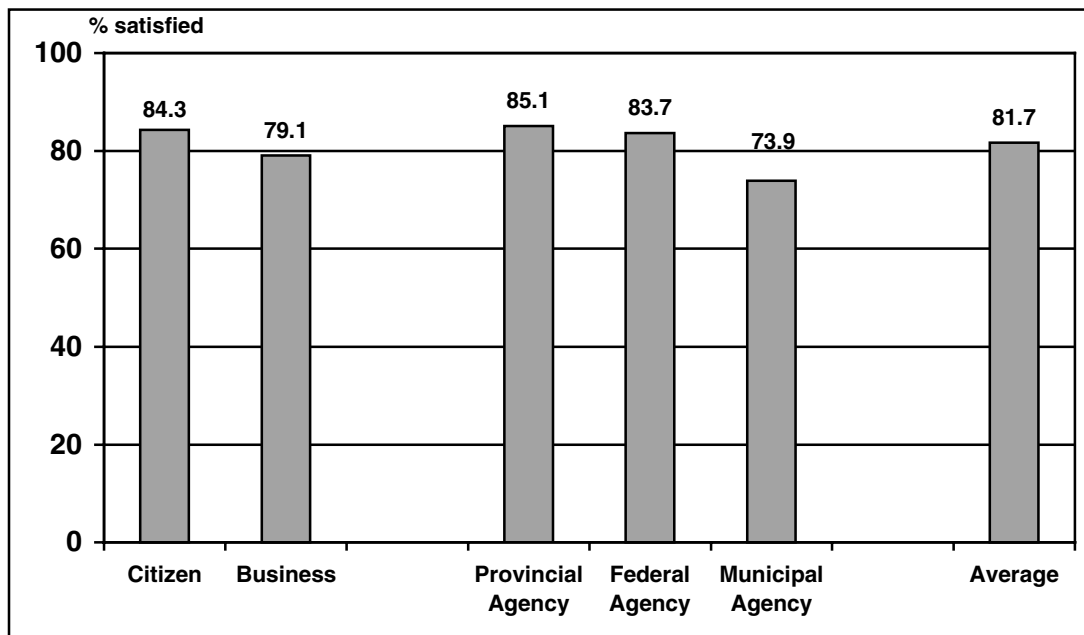
Channel	Sample Size	Business	Citizen	Average
Telephone	439	80.3%	91.6%	88.9%
Kiosk	54	88.7%	83.1%	87.4%
Internet	216	83.1%	89.9%	87.0%
Walk-in	1,455	82.1%	89.1%	85.8%
Mail	55	79.6%	81.7%	80.6%
Fax	15	73.2%	100.0%	75.0%
Other/ Don't know	42	81.4%	78.3%	85.5%
Average – all channels	2,276	82.1%	89.5%	86.3%

*Common Measurements Tool Scale

However, calculations that include all clients (i.e., those who did not obtain the required service during their *first* contact) result in a lower overall level of satisfaction. The proportion of respondents who are satisfied with the service provided was 81.7%. Given that some respondents may have utilized multiple channels, analysis of client satisfaction has been completed on the basis of group and service organization type. As highlighted in Chart 4-1B, while the level of client satisfaction was equal for federal and provincial organizations, it is lower among those clients who accessed municipal services.

Most business and citizen respondents were satisfied with the services received.

Chart 4-1B
Overall Satisfaction with Service Received,*
All Clients



n=3,792 (weighted), *Common Measurements Tool Scale

*Citizens First 2000 reported that the 5 key drivers of client satisfaction with single-window services was: timeliness, knowledge/competence, "the extra mile/the extra smile," fairness, and outcome.³

4.2 Satisfaction with Service Delivery

As outlined in Table 4-2, most business respondents are satisfied with service delivery. 83.5% of business participants feel that staff were knowledgeable and competent, and over 80% agree that staff understood their business needs. However, a slightly lower proportion (70%) of these respondents feel that the Internet contained all of the necessary information.

Also outlined in Table 4-2 is the extent of citizen agreement with particular, aspects of service delivery. Most citizens (90.4%) feel that the organization's staff was knowledgeable and competent, that they were treated fairly (92%) and that the organization provided all that was needed (86.8%). A lower percentage of citizens feel that the Internet was visually appealing (73.6%) and that it included all the necessary information (75.7%).

Overall, business and citizen respondents are satisfied with the various components of service delivery.

³ George Spears and Kasia Seydegar [Erin Research Inc.], *Citizens First 2000* (Toronto: Institute of Public Administration of Canada, 2001).

Table 4-2
Business and Citizen Agreement with Specific Services

Questions	Business	Citizen	Total Combined
Instructions were easy to follow	n/a	86.8%	86.8%
There is no unnecessary red tape	71.1%	n/a	71.1%
It was clear how long it would take to get the service	n/a	78.5%	78.5%
It took a reasonable amount of time	74.9%	82.5%	78.7%
The cost is reasonable	71.7%	n/a	71.7%
There was good co-ordination among governments and departments	70.6%	n/a	70.6%
The organization provided me with all that I needed	n/a	86.8%	86.8%
I did not get bounced from place to place, person to person	n/a	86.5%	86.5%
Walk-in Services			
Staff were knowledgeable and competent	83.5%	90.4%	87.0%
Staff understood my business needs	80.6%	n/a	80.6%
I was treated fairly	n/a	92.0%	92.0%
Staff went the extra mile to make sure I got what I needed	77.0%	87.4%	82.2%
Telephone Services			
It was easy to get through on the phone	65.4%	77.6%	71.5%
I knew I could contact a real person if I needed to	70.8%	81.4%	76.1%
I was not left on hold for an extended period of time	72.8%	83.0%	77.9%
Internet Services			
It was easy to find what I was looking for on the Internet site	74.7%	75.9%	75.3%
The Internet site had all the information I needed	70.0%	75.7%	72.9%
The Internet site was visually appealing	70.0%	73.6%	71.9%
The Internet site was easy to use	76.4%	80.2%	78.3%
I am confident that my transactions are secure on the Internet site	74.8%	n/a	74.8%

n=1,921 Business clients, walk-in services n=1,470, telephone services n=666, Internet services n=235 (unweighted)

n=1,871 Citizen clients, walk-in services n=1,142, telephone services n=716, Internet services n=198 (weighted)

*Common Measurements Tool Scale

Service Lesson:

Government should continue to improve co-ordination among governments and departments in service delivery.

While business and citizen clients are generally satisfied with most service components, a lower proportion (70.6%) of business clients feel that there was good co-ordination among governments and departments.

4.3 Satisfaction and Number of Referrals

In addition to defining customer satisfaction with various channels of service delivery, an important element in the research was to identify what factors/issues contributed or influenced client (either citizen or business) satisfaction with services.

Analysis of the data suggests that citizen/business satisfaction with the services provided are affected by the following factors⁴:

- extent to which the client obtained required service during the initial visit;
- extent to which the client was referred to other branches/departments; and
- appropriateness of information/service received.

Overall, survey results suggest that providing clients with required services/information during their first contact with the organization generally results in a high level of satisfaction with the service provided. For example, as detailed in Table 4-3, satisfaction among business and citizen respondents is markedly higher among those individuals who received the required information/service during their initial contact as compared to those individuals who obtained their required service/information after their second, third or fourth visit.

Table 4-3
Client Satisfaction with Service Provided,*
First Visit vs. Second-Fourth Visit

	Initial Visit	After First Visit	After Second Visit	After Third Visit	After Fourth Visit
Business	83.2%	77.6%	66.7%	51.6%	23.7%
Citizen	91.1%	72.2%	63.0%	46.8%	24.4%
Average	87.6%	75.6%	65.3%	49.6%	24.1%

(*% reporting satisfied/very satisfied)

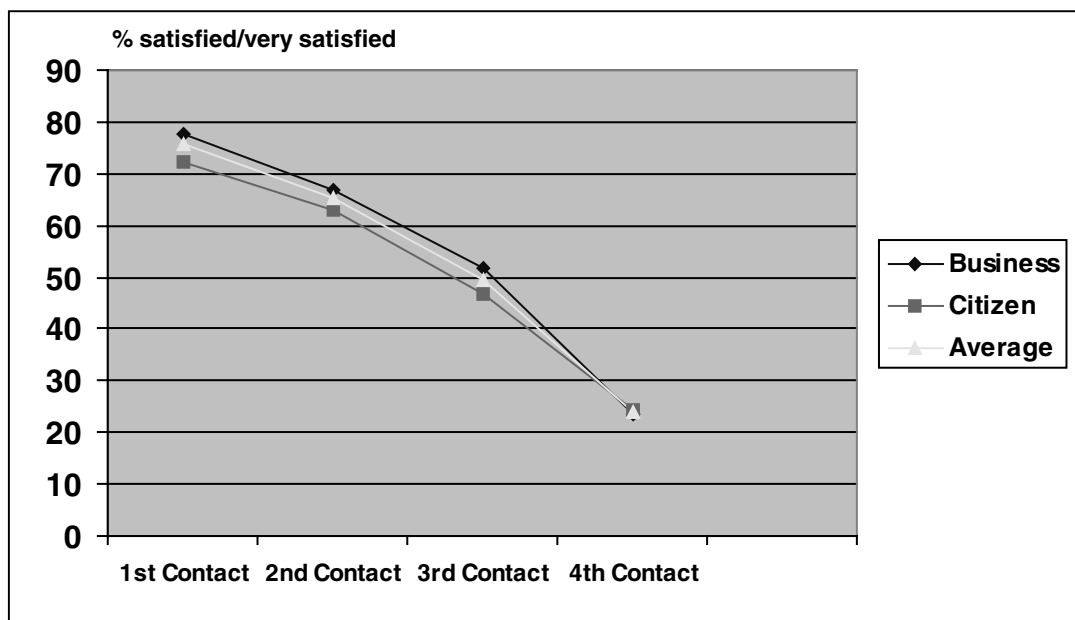
Notwithstanding, the high level of satisfaction with services received, client satisfaction declines markedly among those clients who are referred multiple times to other organizations/branches. As highlighted in Chart 4-3, satisfaction with the "process" of accessing government services declined from 75.6% among those individuals who were referred once to 24.1% among those individuals who indicate that they were referred to other organizations/branches four times during their attempt to obtain required information and/or services.

Clients who obtained the required service when they first accessed a single-window service are the most satisfied with services provided.

The number of referrals clearly affects client satisfaction with the end-service received.

⁴ The factors in this report are consistent with those in *Citizens First 2000*.

Chart 4-3
Client Satisfaction with the Service Process,
by Number of Times Referred to Different Branches/Organizations



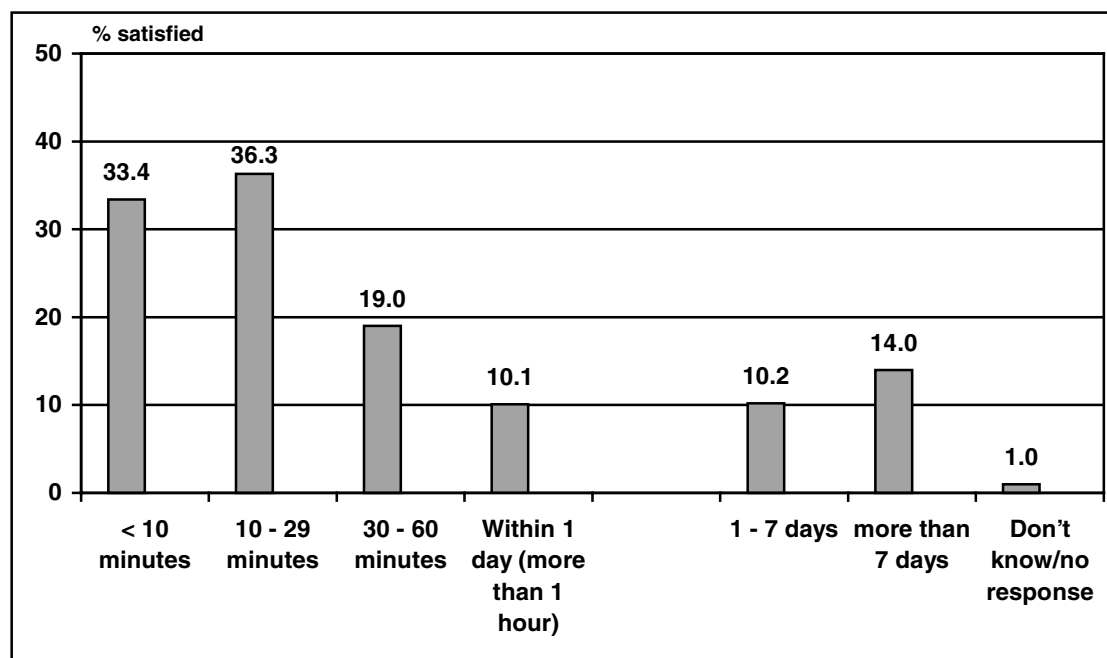
Client satisfaction exhibits a marked decline as clients get referred to other branches/organizations.

4.4 Satisfaction with Length of Time it Took to Complete Service

As detailed in Chart 4-4A, approximately three-quarters (74.8%) of clients report that they received their required service within one day. In fact, more than one-half (69.7%) of clients who received service indicate that it was provided within 30 minutes. It should be noted, however, that a higher proportion (28.3%) of business respondents report that their service took longer than one day to complete than is the case for citizen respondents (20%).

More than one-half of clients report that their required service was provided within 30 minutes.

Chart 4-4A
Length of Time Required to Obtain Service



for Those Individuals Who Accessed Service(s)

n=3,496 (weighted)

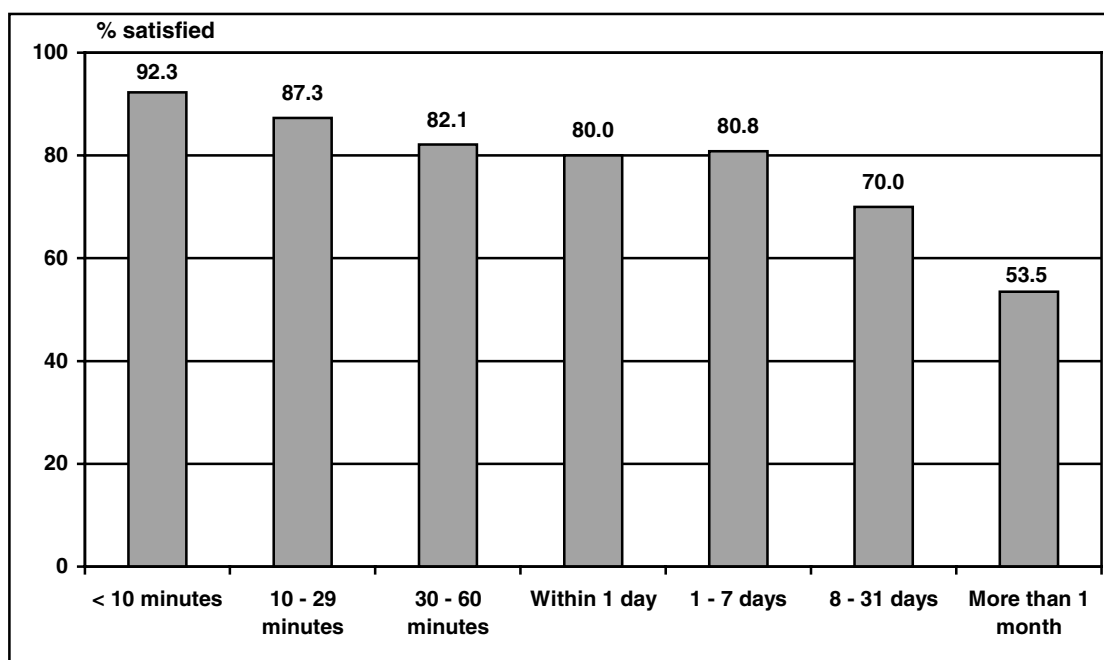
Quick service generally resulted in very high client satisfaction.

Given the correlation between satisfaction and the number of visits, it is not surprising that there is also a high correlation between overall satisfaction and length of time required to access services. For example, as depicted in Chart 4-4B, satisfaction with the service received markedly declines the longer the client had to wait to obtain the particular service. For example, among those clients who received their required service within 10 minutes, 92.3% indicate that they were satisfied with the service. Among those individuals who had to wait more than 31 days to obtain their service, a much lower proportion (53.5%) indicate satisfaction with the service received.

Service Lesson:

Service providers should continue to reduce unnecessary time spent acquiring a service.

Chart 4-4B
Overall Satisfaction with Services Received,*
by Time Elapsed before Completion of Service



n=3,467 (weighted), *Common Measurements Tool Scale

There were some differences in service times based on the channel first accessed.

No particular channel can be characterized as providing “speedier” service. Although a high proportion (91.7%) of kiosk clients report that they completed their service within one hour, only 20% of kiosk clients completed their service in less than 10 minutes. Similarly, a much lower proportion of Internet clients note that service was completed within one hour (Table 4-4).

Table 4-4
Length of Time to Complete Service,
by Initial Channel Used

Time/Channel	Telephone	Walk-in	Kiosk	Internet	Fax/Mail	Total ⁽¹⁾
Sample Size	1,067	1,844	60	348	94	3,464
< 10 minutes	27.1%	24.8%	20.0%	23.3%	25.5%	25.2%
10 – 29 minutes	21.5%	31.5%	50.0%	25.0%	12.8%	27.4%
30 – 60 minutes	11.9%	15.6%	21.7%	17.0%	4.3%	14.3%
% less than 1 hour	60.5%	71.9%	91.7%	65.3%	42.6%	66.9%
within 1 day (more than 1 hour)	8.1%	6.5%	5.0%	10.4%	9.4%	7.7%
1 – 7 days	18.0%	6.5%	5.0%	10.4%	9.4%	7.7%
8 – 31 days	7.4%	5.6%	--	5.5%	8.2%	6.0%
more than 31 days	5.6%	4.0%	1.7%	1.4%	7.1%	4.4%

⁽¹⁾Total includes those citing other/don't know channels

Note: Totals will not add to 100% as some clients were still in the process of receiving services at the time of the survey.

Survey results suggest that some services are better provided by specific channels than are other services.

4.5 Client Satisfaction -- by Channel by Service Requirement

In addition to identifying the extent to which client satisfaction is affected by the number of times clients had to visit/contact their respective organization, it appears that some channels are better suited to service particular requirements than are others.

For example, as highlighted in Table 4-5A, the following was observed:

- Business clients interested in applying for business loans/grants who first utilized telephone channel(s) are generally disappointed with the service received (only 19% of such clients are satisfied).
- Irrespective of the channel used, all clients are generally satisfied with assistance provided regarding business name searches.

Table 4-5A
Service Requirements Generating Highest and Lowest Levels of Satisfaction,*
by Service Channel First Used,
Business Clients

	Telephone	Walk-in	Internet (top two only)
Highest Levels of Satisfaction (top 3)	<ul style="list-style-type: none"> • Business name search (91%) • Import/export information (90%) • Seminars (general) (88%) 	<ul style="list-style-type: none"> • General business information (93%) • Business registration/business name registration (86%) • Business name search (84%) 	<ul style="list-style-type: none"> • Business name search (85%) • Information on starting a business (84%)
Lowest Levels of Satisfaction (bottom 3)	<ul style="list-style-type: none"> • Building/development permits (57%) • Business loans/grant information (53%) • Business grant/loan applications (19%) 	<ul style="list-style-type: none"> • Other permits (59%) • Small business information (55%) • Business grant/loan information (50%) 	<ul style="list-style-type: none"> • Business registration/business name registration (79%) • General business information (75%)

Note: Data based on responses to two questions for those business respondents who either obtained their service or were referred on. Includes those services with 10 or more respondents.

*% citing satisfied or very satisfied.

A similar analysis (Table 4-5B) of citizen clients suggests that not all services are delivered equally well by all channels.

Service Lesson:

Service providers need to review what services can be most effectively provided through particular channels. Some services such as loans/grants are not being satisfactorily delivered by any channel.

Irrespective of the channel used, it appears that business clients are less satisfied with services related to business loans/grants.

Table 4-5B
Service Requirements Generating Highest and Lowest Levels of Satisfaction,*
by Service Channel First Used,
Citizen Clients

	Telephone	Walk-in	Internet (top two only)
Highest Levels of Satisfaction (top 3)	<ul style="list-style-type: none"> • CPP application (100%) • motor vehicle branch services (100%) • Vehicle registration (97%) 	<ul style="list-style-type: none"> • Information CPP/WCB/EI etc. (100%) • Internet/fax/resume/photocopier access (97%) • Bill payment (96%) 	<ul style="list-style-type: none"> • Address change (100%) • Vehicle registration (98%)
Lowest Levels of Satisfaction (bottom 3)	<ul style="list-style-type: none"> • Tax information /CCRA/(Revenue Canada) (73%) • Health services (64%) • Health/medical information (63%) 	<ul style="list-style-type: none"> • Strategy database/directory information (75%) • Health services (69%) • Social assistance/welfare application (46%) 	<ul style="list-style-type: none"> • Drivers abstract (83%) • Other information (65%)

Note: Data based on responses to two questions for those citizen respondents who either obtained their service or were referred on. Includes those services with 10 or more respondents.

*% citing satisfied or very satisfied.

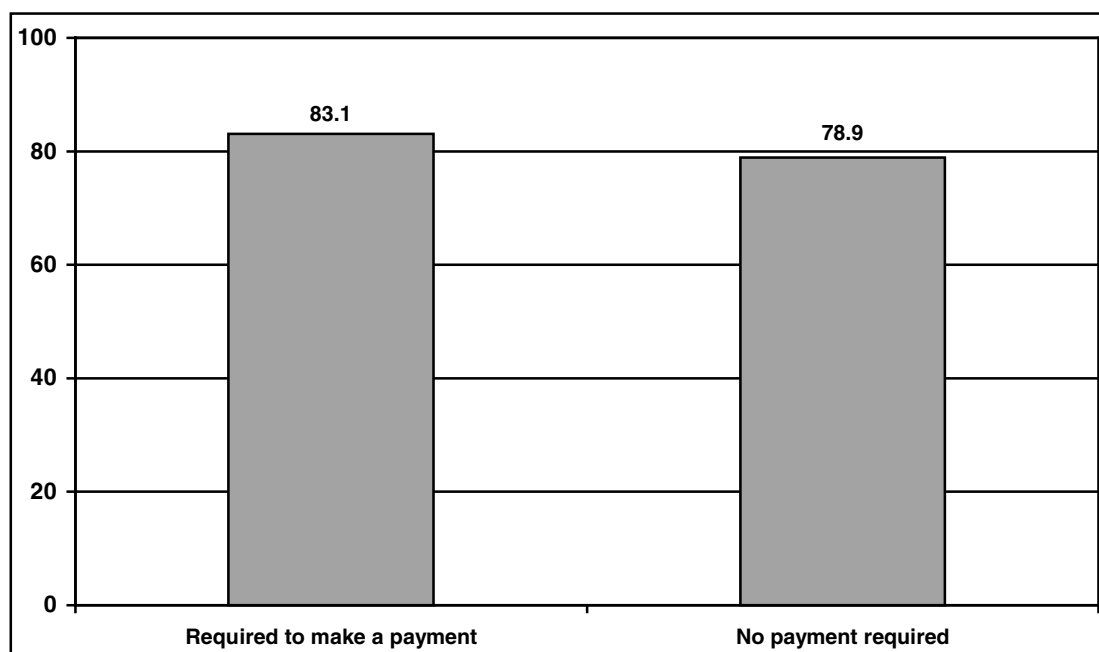
4.6 Client Satisfaction – by Cost of Service

In addition to examining the extent to which client satisfaction is affected by service delivery, analysis was also completed on the basis of whether the service required payment. It was hypothesized that among those individuals who paid for a service, there could be a higher level of dissatisfaction in that they felt they did not get “good value for their money.”

As highlighted in Chart 4-6, it appears that payment for the service does not affect client satisfaction with the service. In fact, as highlighted in the chart, those clients who did *not* make a payment tend to be slightly less satisfied with the service obtained than those individuals who had made a payment.

Clients who made a payment are slightly more satisfied with their overall service.

Chart 4-6
Client Satisfaction by Whether the Service Required Making a Payment*



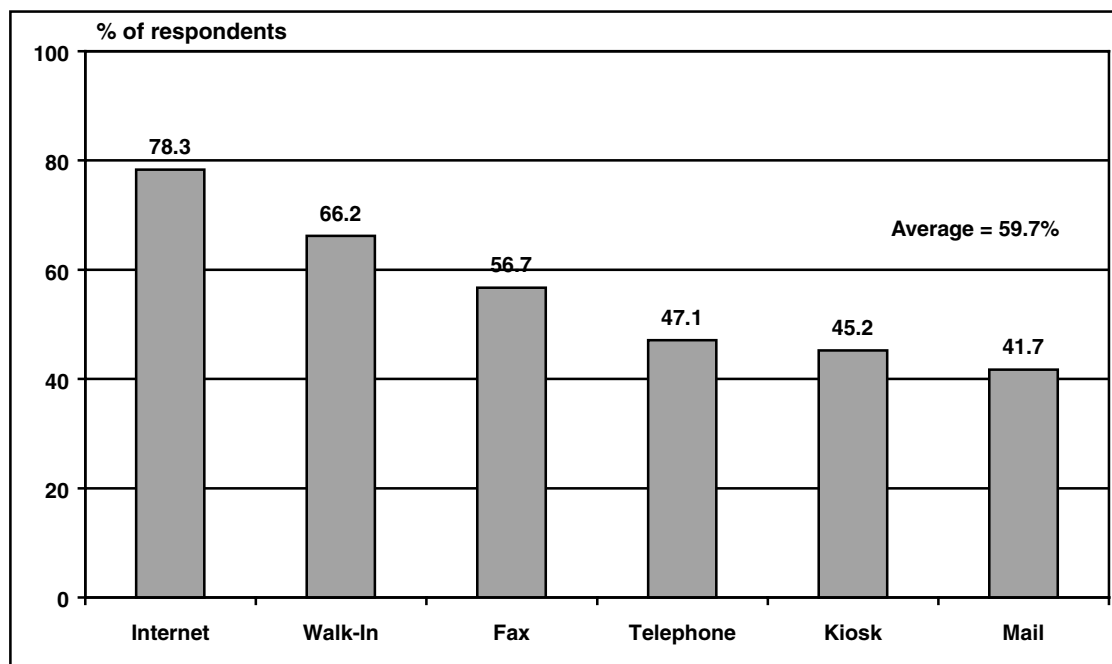
n=3,792 (weighted), *Common Measurements Tool Scale

4.7 Client Satisfaction -- by Channel by Service Requirement (Channel "Loyalty")

Client "channel loyalty" provides an indication of client satisfaction with each channel.

To measure client satisfaction with a particular service, the proportion of clients who indicate that they would utilize the same channel again can be examined. Analysis of the data (Chart 4-7A) indicates that "loyalty" to a channel varies from a high of 78.3% among individuals who first accessed services via the Internet to a low of 41.7% among those individuals who first accessed their service by mail.

Chart 4-7A
Service Channel “Loyalty”
Proportion of Clients Who Would Prefer to Use the Same Service Channel for
the Same Service*



*Defined as % of clients who first accessed the channel who noted that they would prefer to use this channel if they had to access the same service(s) in the future
n=3,792 (weighted)

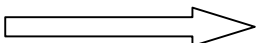
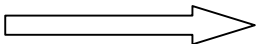
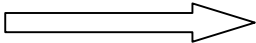
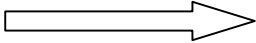
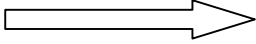
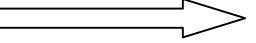
As highlighted in chart above, channel loyalty provides some indication as to the ease, or perceived ease, of using the various channels to access the required information or service. Analysis of the data suggests that while Internet users are generally satisfied with the process and channel used, a considerably lower proportion of telephone and kiosk channel users are of the same opinion.

As detailed in Table 4-7A, with the exception of Internet clients, there is no emergent pattern regarding preferred channels among citizen and business clients.

Channel loyalty is highest among Internet clients, as 78.3% indicate that they would prefer to use the same channel for accessing the same service in the future.

Table 4-7A
Services Accessed and Channel Preference for Future Similar Services

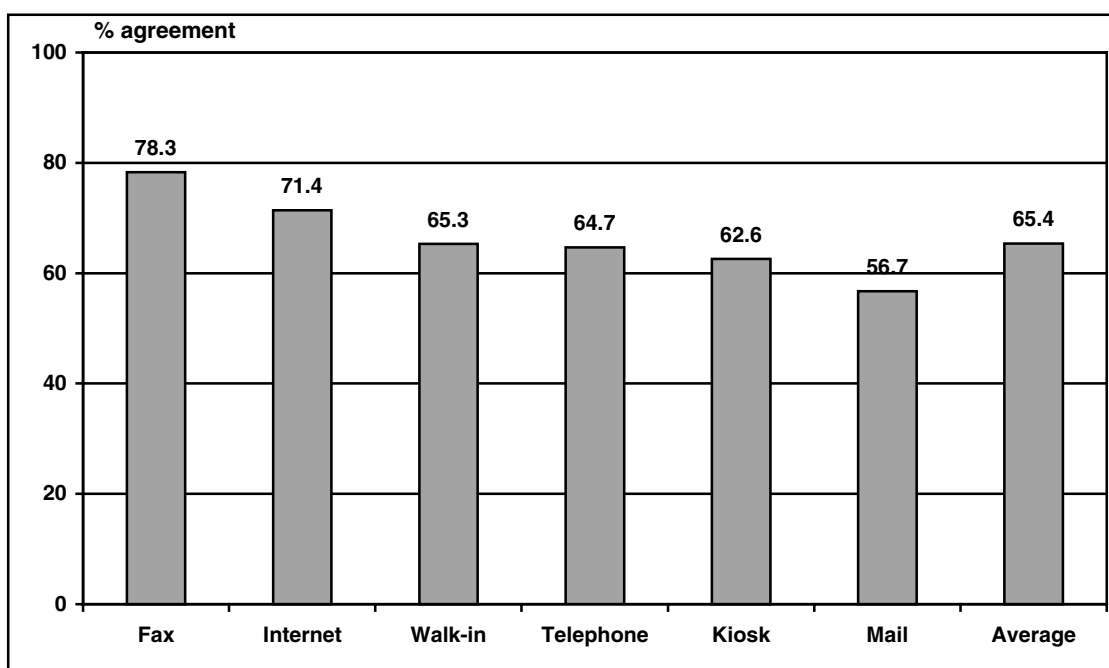
Many individuals indicate that there is, perhaps, a better way to access their service than the channel first used. 40% of clients indicate that they would like to use a different channel for the identified service in the future.

First Channel Accessed	Future Channel Preference
<div style="border: 1px solid black; padding: 5px; text-align: center;">Internet</div> 	<ul style="list-style-type: none"> ● Internet (78.3%) ● Walk-in (11.1%) ● Telephone (6.1%) ● Other (4.5%)
<div style="border: 1px solid black; padding: 5px; text-align: center;">Walk-in</div> 	<ul style="list-style-type: none"> ● Walk-in (66.2%) ● Internet (18.3%) ● Telephone (8.0%) ● Other (7.5%)
<div style="border: 1px solid black; padding: 5px; text-align: center;">Fax/Mail</div> 	<ul style="list-style-type: none"> ● Fax/Mail (45.6%) ● Internet (20.2%) ● Telephone (14.0%) ● Other (20.2%)
<div style="border: 1px solid black; padding: 5px; text-align: center;">Telephone</div> 	<ul style="list-style-type: none"> ● Telephone (47.1%) ● Walk-in (27.5%) ● Internet (17.3%) ● Other (8.1%)
<div style="border: 1px solid black; padding: 5px; text-align: center;">Kiosk</div> 	<ul style="list-style-type: none"> ● Kiosk (45.2%) ● Internet (29.0%) ● Walk-in (19.4%) ● Other (6.4%)
<p>Overall</p> <div style="border: 1px solid black; padding: 5px; text-align: center;">Original Channel</div> 	<ul style="list-style-type: none"> ● 60% would use the same channel ● decreases in clients selecting telephone (-35.3%) and walk-in (-12.6%) channels ● increases in clients selecting Internet (+24.2%), kiosk (+61.3%) and fax/mail (+38.6%)

Respondents were also asked to indicate the extent to which they feel that governments were "innovative" in terms of providing services to clients. As highlighted in Chart 4-7B, approximately two-thirds (65.4%) of respondents feel that governments are innovative.

It is interesting to note that those individuals who accessed government services via fax and the Internet are most likely to agree that governments are being innovative in improving service delivery to citizens.

Chart 4-7B
Citizen Opinion about the Extent to which Governments
are Innovative in Terms of Service Delivery to Citizens,
by Channel First Used*

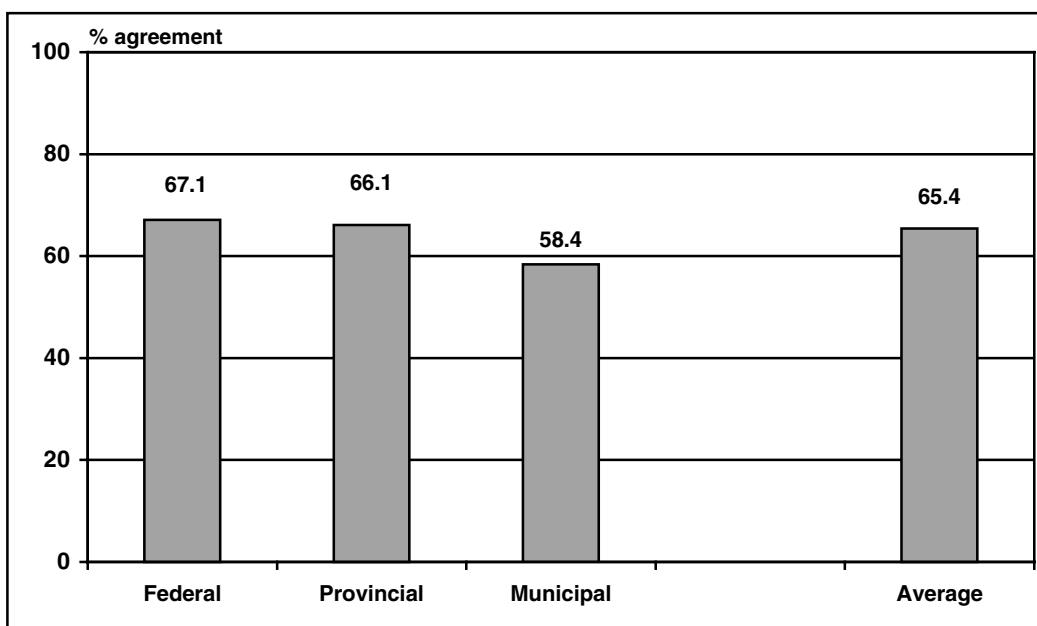


n=1,871 Citizens (weighted), *Common Measurements Tool Scale

As highlighted in Chart 4-7C, it appears that there is considerable scope for all government organizations to become more innovative in improving service delivery to citizens. For example, while 67.1% of citizens are positive about the efforts being made by federal departments, only 58.4% of citizens who accessed municipal services are of the same opinion.

65% of citizens think that governments are being innovative in improving service delivery to citizens.

Chart 4-7C
Extent to Which Governments are Being Innovative
in Terms of Improving Service Delivery to Citizens,
by Government Organization*



n=1,871 Citizens (weighted), Common Measurements Tool

4.8 Client Satisfaction – Implications for Service Delivery

Analysis of the data suggests that while client satisfaction is high across all service-delivery channels, there are several factors that affect overall client satisfaction.

1. No individual service channel stands out as being the “best” channel.

There is a high level (87%) of satisfaction with the channels typically used by business and citizen clients (walk-in, telephone, Internet and kiosks). Client satisfaction for mail/fax channels is lower at 80.6% and 75%, respectively. Data, therefore, suggest that no single channel can be clearly identified as the “best.”

2. There are several factors that influence client satisfaction, including the number of referrals and length of time to complete the service.

Survey data clearly demonstrate that client satisfaction is highly correlated with the individual’s ability to obtain the required service during the first visit and within reasonable time. Client satisfaction plummets if there are more than two referrals and the wait to obtain service is more than one hour.

3. Data suggest that there is a need to review what services can most effectively be provided through particular channels.

While it is clear that some services, such as those regarding business loans/grants, are not being particularly well delivered by any channel, survey results suggest that some channels may be better suited than others for certain activities. For example, while information pertaining to small business is assigned a satisfactory rating by only 55% of walk-in clients, it has a higher rating among Internet clients. Although the small sample size renders the data inconclusive, research suggests that services could be tailored to better address client needs.

4. Citizen and business clients believe that the Internet could offer a better way to obtain service.

Analysis of channel loyalty suggests that an important (and growing, perhaps) proportion (up to 24% of the sample) would prefer to use the Internet to access service in the future. It should be noted that since many individuals have yet to utilize this channel, such expectations may be based on assumptions regarding speed of service and ability to obtain the required information or service. In effect, the data suggest that while only a low proportion of clients used the Internet to first access their particular service, many more clients would like the opportunity to utilize the Internet to access their specific service in the future.

5. Governments must still make provision for “personal” service delivery.

Notwithstanding the interest in the Internet, government organizations must accommodate the majority (66.1%) of clients who would still prefer to access government services via walk-in (45.6%) or telephone (20.5%) channels. This desire for personal service could reflect a lack of access/comfort with computers, distrust of the security of on-line transactions, or the need to obtain additional assistance that may not be available through electronic channels.

6. There is scope for government to become more innovative in service delivery.

The results of the citizen survey suggest that there is room for governments to become more innovative in improving service delivery to citizens. Respondents are particularly critical of municipal delivery, as municipal service delivery obtained a 58.4% satisfaction rating – which is lower than that of federal (67.1%) or provincial (66.1%) organizations.

Chapter 5. The Security Issue

Since a significant proportion of business (80.9%) and citizen (49.3%) services required that the client make a payment to government, it is important to identify citizen confidence with various proposed payment options.

5.1 Citizen Confidence with Security Protection

An important issue examined in the citizen survey was the extent to which citizens felt comfortable in utilizing electronic (phone, Internet) means to conduct business with both private- and public-sector organizations. Respondents were asked to indicate their confidence in the security of transactions conducted by phone or over the Internet with either a private company or government organization.

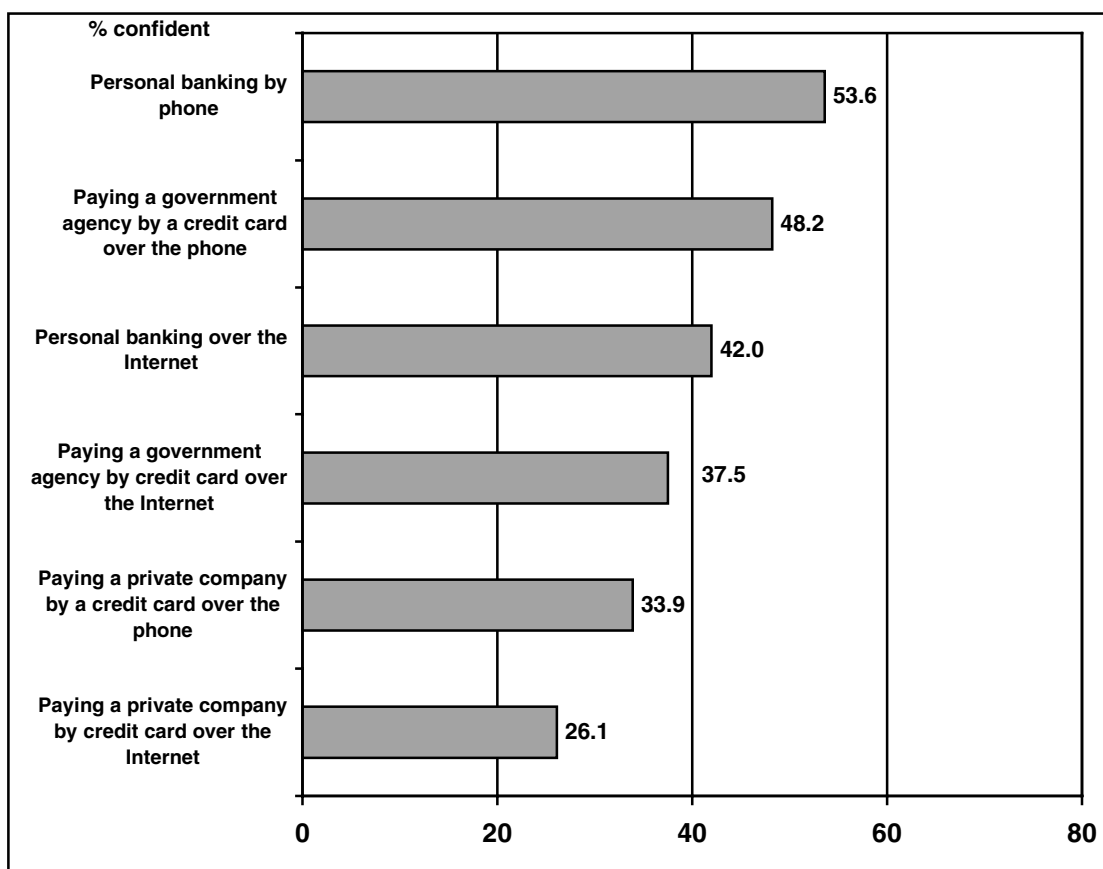
As highlighted in Chart 5-1, on average, citizens do not express confidence in completing transactions by either telephone or the Internet. For example, even for the transaction (personal banking by telephone) with which citizens are most comfortable, only 53.6% of respondents are confident that their security is protected. In comparison, a much lower proportion of respondents are confident of the security associated with paying a private company by credit card over the phone (33.9%) or paying a private company by credit card over the Internet (26.1%).

Service Lesson:

Service providers must continue to address security issues related to on-line or telephone transactions prior to implementation. The resistance among clients surveyed suggests that a marketing campaign will be necessary to reassure Canadians on this point.

In general, citizens have reservations about completing financial transactions by either phone or over the Internet.

Chart 5-1
Citizen Confidence with Security Protection*



n=1,871 Citizens (weighted), *Common Measurements Tool Scale

Citizens are more confident in completing credit card transactions (either by phone or Internet) with a government organization than with a private company.

It is interesting to compare whether citizens are more confident in conducting credit card transactions with either a government organization or a private company. As highlighted in Table 5-1, while citizens are generally skeptical of the security associated with paying by phone or Internet, citizens are twice as confident with paying a government organization as compared to using phone/Internet mediums to make credit card payments to a private company.

Service Lesson:

Service providers would need to address concerns over the security of transactions if the private sector is used to deliver government services.

Table 5-1
Citizen Confidence in Protection of Security in Making Payments

	% Not Very Confident	% Not Confident	% Neutral	% Confident	% Very Confident
Government Organization					
Paying by credit card over the phone	26.6%	11.1%	17.7%	24.8%	16.2%
Paying by credit card over the Internet	36.3%	12.3%	16.1%	17.3%	10.7%
Average – paying government by phone/Internet	31.5%	11.7%	16.9%	21.1%	13.5%
Private Company					
Paying by credit card over the phone	36.8%	17.0%	21.5%	15.7%	6.2%
Paying by credit card over the Internet	46.4%	15.0%	16.2%	11.4%	3.8%
Average – paying private company by phone/Internet	41.6%	16.0%	18.9%	13.6%	5.0%

n=1,871 Citizens (weighted)

Note: Totals will not add to 100% due to don't know responses not shown

5.2 Client Security Confidence – Implications for Service Delivery

Since many services require citizens and business clients to make a payment, citizen opinion regarding the security of such transactions could play an important role in the selection/adoption of future service channels. A summary of the key implications is listed below.

1. Citizens are not confident in the security of credit card payments made either by phone or through the Internet.

In general, it appears that most Canadians are *not* confident in the security of credit card payments made either by telephone or the Internet. For example, only 48.2% of clients indicate that they are confident of the security associated with making a credit card payment to government over the telephone, and a much lower proportion (37.5%) expresses confidence in credit card payments to government via the Internet (Chart 5-1).

3. Concerns over the security of transactions would need to be addressed if third-party providers are used.

Moving government services that require payments to a third-party provider may require enhanced transaction security. In general, citizen confidence with conducting phone/Internet credit card transactions with a private company is only one-half that of the (already low) confidence in government organization transactions that require credit card payments by telephone or via the Internet.

Chapter 6. Client Profiles

6.1 “Client Profiling”

In analyzing the data, it is possible to develop a profile of some of the clients of single-window government services examined in this survey. Development of these profiles is limited to the *citizen* sample and includes the three following groups:

“Mature First-Timers” (13% of the citizen sample)

Mature First-Timers represent those individuals aged 50 years or older who have not previously accessed a government organization. Typically, Mature First-Timers use the telephone or walk-in channels almost 90% of the time for their initial contact. Introducing new concepts to this group could be problematic, as more than one-quarter (27.2%) of this group do not have a high school diploma, and more than one-third (34.8%) do *not* use a computer.

Mature First-Timers are also more likely to be referred to other branches or departments. Only 52.9% of Mature First-Timers obtained the required services during their initial visit as compared to 68.7% of all citizen respondents. It might, therefore, be incumbent upon governments to communicate more clearly information regarding services.

Despite not being able to obtain their required service at the time of their first inquiry, Mature First-Timers have a high level of satisfaction (80.3%) with services provided.

Given the high proportion of Mature First-Timers who do not use a computer, it is not surprising that this group is somewhat uncomfortable paying a private company or government organization by credit card either by phone or the Internet. The proportion of Mature First-Timers who were confident or very confident paying a government organization by credit card over the Internet is only two-thirds that of the survey average. Similarly, Mature First-Timers are less supportive of having a single electronic identity (46.8% vs. the survey average of 54.1%), but they are generally supportive of a single card for all government services.

“Techno Service Advocates” (14% of the citizen sample)

Techno Service Advocates are defined as individuals of less than 50 years of age who have intermediate or advanced computer skills and who would prefer to access future services through the Internet or kiosks. This group tends to be highly educated, as more than 85% have some post-secondary education. While all would prefer to have accessed government services electronically,

Citizen profiles were developed for three groups:

- *Mature First - Timers*
- *Techno Service Advocates*
- *High-Volume Clients*

Mature First-Timers are older clients who are accessing government services for the first time.

Mature First-Timers would be hesitant to pay with a credit card by either telephone or the Internet.

Techno Service Advocates want services delivered electronically.

Techno Service Advocates are comfortable paying by telephone or the Internet.

56% note that their initial contact was by telephone or walk-in channels. Perhaps reflecting their dissatisfaction with the initial channel selected, Techno Service Advocates are more dissatisfied with the service provided than are other clients.

Not surprisingly, Techno Service Advocates are very confident using telephone and Internet channels. In fact, they are twice as likely (64.7%) to conduct their personal banking over the Internet than are the larger demographic sample of citizens (31%). Techno Service Advocates are also much more comfortable paying a government organization by credit card over the Internet (56.5% vs. citizen average of 28%).

Techno Service Advocates are very supportive (90%) of initiatives to move more government services to the Internet, since they indicate that governments should provide more services on the Internet and link municipal, provincial and federal services through a single portal.

High-Volume Clients (32% of the citizen sample)

Despite the considerable amount of routine service completed with government, most High-Volume Clients accessed government services via telephone or walk-in channels.

High-Volume Clients refers to those individuals who have accessed the particular service five or more times. High-Volume Clients reflect the general demographics of the citizen sample, with a slight majority (55%) being female. Notwithstanding the extensive access of government services, almost nine in ten (88%) High-Volume Clients utilized telephone (22%) or walk-in (66%) channels. High-Volume Clients tend to be between the ages of 24 and 49 years, although a significant proportion (33.8%) are 50 to 64 years old. High-Volume Clients come from three primary occupational groups: professionals (18%), office staff (20%) and retired (18%).

High-Volume Clients expect to obtain the required service during their first contact with the organization. One in five High-Volume Clients, as compared to the survey average of one in ten, becomes dissatisfied with the service if they are referred to another branch/organization.

Lack of access to, and only limited understanding of, computers could prove problematic in encouraging more High-Volume Clients to access services via the Internet.

In terms of moving more services to electronic channels (Internet, kiosks), there could be some resistance among High-Volume Clients, since a significant proportion either do not have a computer (17%) or classify themselves as beginner (22%). This partially explains the reluctance of High-Volume Clients to embrace the Internet/kiosks as a future way of accessing government services. For example, in comparison to the one-quarter (27%) of the larger sample of citizen clients who would prefer to access government service via electronic means (Internet, kiosk) in the future, only 19% of High-Volume Clients identify Internet or kiosks as their future service channel preference. It should be noted, however, that a significant proportion of High-Volume Clients support the concept of a single electronic identity (53%)

support) and the idea of having one card for all government services (63% support).

6.2 Client Profiles – Implications for Service Delivery

1. Specific channel services should be marketed to different client groups.

An analysis of the data underscores the diversity of client groups that access single-window services. The considerable differences between Mature First Timers and Techno Service Advocates suggest that movement to the Internet, while welcomed by one group, could pose considerable challenges to another. In this context, it is important to be cognizant of the various client groups when developing marketing/communications strategies.

2. There may be resistance to efforts to re-allocate resources from telephone/walk-in channels to electronic channels.

High-Volume Clients – those clients who have accessed the particular service five or more times – may be resistant to efforts to channel more services through the Internet or kiosks. For example, almost 40% of High-Volume Clients either do not have a computer or classify themselves as beginner. Perhaps for this reason, the proportion of High-Volume Clients who would prefer to access services via the Internet or kiosk channels was found to be lower than that of the citizen average.

Chapter 7. What Business Clients Want from Single-Window Services

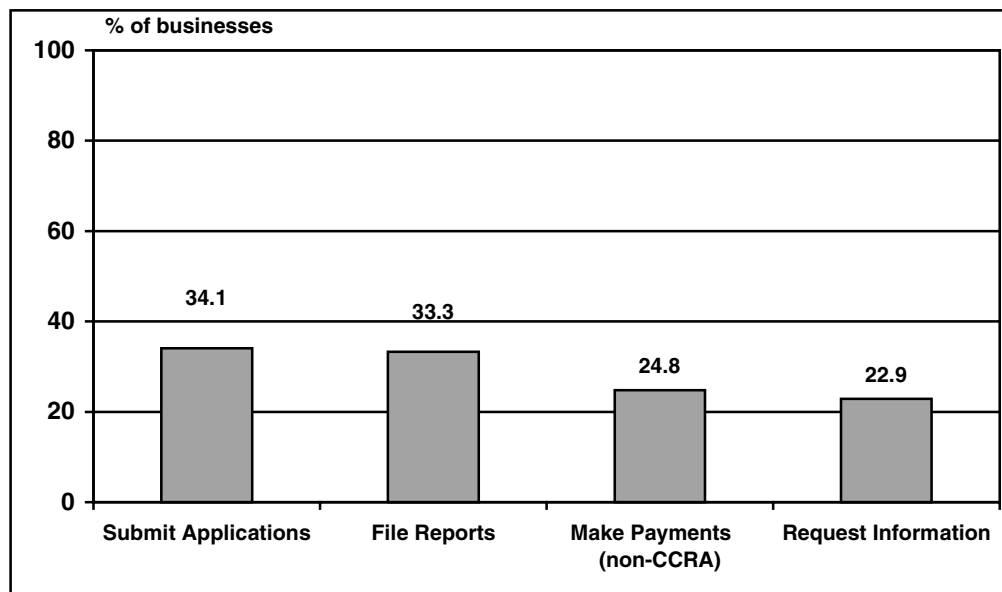
A key objective of the survey was to identify how business respondents would prefer to conduct their future interactions with government. In particular, business respondents were asked how they currently managed their relationship with government regarding four major functions:

- **Getting information from government.** This included searches of records, databases, land titles, assessments, motor vehicle registrations, regulations and other information.
- **Reporting information back to government.** Typically, this included provision of information relating to employees, operations, health and safety and other reporting requirements.
- **Registration.** Examples included applications, permits, licenses, certificates.
- **Payments.** Typical payments were defined as fees, taxes and licensing dues. Excluded from these payments were payments to Canada Customs and Revenue Agency (CCRA).

7.1 Assessing Business Involvement with Government

As highlighted in Chart 7-1A, a relatively low proportion (22.9%) of business respondents indicates that they requested information from government or that they made payments (excluding CCRA) to various government organizations (24.8%). A higher proportion of business participants had submitted applications (34.1%) to government or had filed reports (33.3%) to municipal, provincial and/or federal governments.

Chart 7-1A
Business Contact with Government – Selected Activities

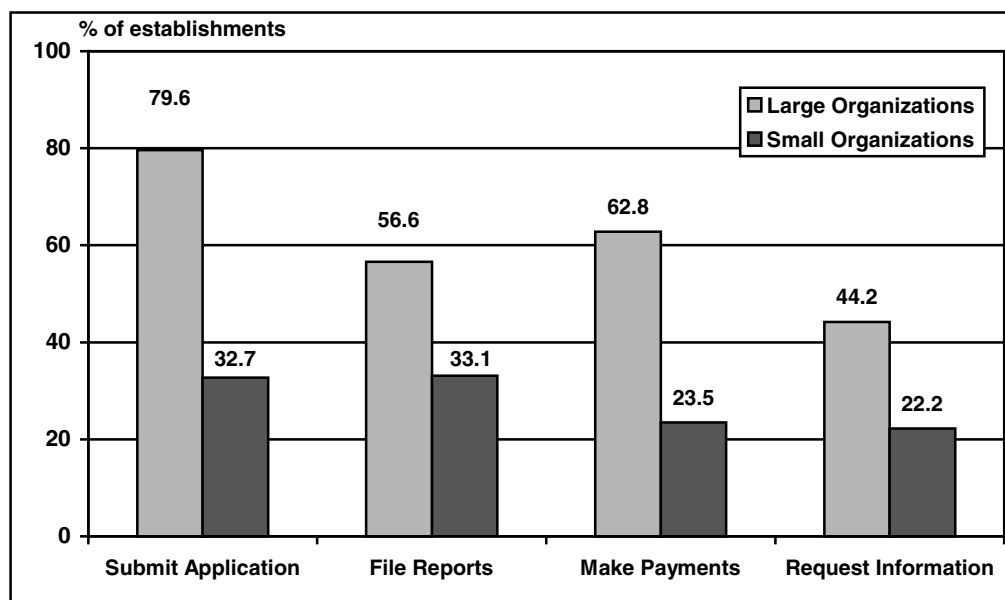


n=1,923 (unweighted)

Large organizations were much more likely to have regular contact with government than were smaller business establishments.

There are considerable differences in terms of organization contact with government on the basis of the size of the business. As highlighted in Chart 7-1B, large organizations (defined as those organizations with 20 or more employees) are considerably more likely to have regular “contact” with government organizations than are those establishments that have fewer than 20 employees.

Chart 7-1B
Business Contact with Government – Selected Activities, by Size of Business



n=113 large (20+ employees) and n=1,710 small (less than 20 employees) establishments (unweighted)

Detailed in Table 7-1 are the four most common requests and the three most common ways businesses “interact” with government organizations to obtain service. Also listed are the three most commonly cited improvements that could be made to enhance the manner in which business interacts with government.

Table 7-1
Attributes/Requirements Associated with
Business Interaction with Government – Selected Activities

Issue/Element	Getting Information	Reporting Information	Registration/ Applications	Making Payments
Sample Size	1,921	1,921	1,921	1,921
% citing this as a “regular” activity (with government)	22.9%	33.3%	34.1%	24.8%
Channel currently used for this activity (top 3)	<ul style="list-style-type: none"> • Telephone (52.4%) • Internet (47.6%) • Walk-in (41.2%) 	n/a	<ul style="list-style-type: none"> • Walk-in (55.9%) • Mail (36.6%) • Fax (18.0%) 	n/a
% filing or making payments electronically	n/a	21.1%	n/a	10.3%
Suggestions for improving service/interaction (top 3)	<ul style="list-style-type: none"> • Make all information available on-line (20.7%) • More accessible staff, more one-on-one opportunities (13.4%) • Centralized information and referral service (8.7%) (n=49)	<ul style="list-style-type: none"> • Ability to report electronically or on-line (25.8%) • More time to submit reports (4.2%) • Simplify the forms (4.2%) (n=331)	<ul style="list-style-type: none"> • On-line application registration service (25.5%) • Faster processing (5.8%) • Application process more user-friendly (4.6%) (n=395)	n/a

From a review of Table 7-1, some interesting observations are apparent:

- **Canadian businesses have only limited electronic interaction with single-window services.** Only 21.1% of businesses report that they file their reports electronically, and only 10.3% of businesses note that they currently submit non-CCRA payments electronically.
- **Canadian businesses want to do more business “on-line.”** In terms of identifying opportunities for improvement, one of the top three ways commonly cited, by those respondents that provided a suggestion, was the introduction or enhancement of “on-line” opportunities. For example, providing information and/or services

More than 50% of business clients used telephone services to obtain information, and over 50% used walk-in services for registrations/ applications.

"on-line" was cited by a significant proportion of business respondents for each of the four key business activities.

Service Lesson:

Businesses want more enhanced on-line opportunities such as providing information and/or services.

7.2 Managing Accounts with the Governments: Options

An important issue addressed in this study was the concept of consolidating the multiple accounts that businesses had with various government organizations. Of the 1,921 businesses, 797 (41.5%) had one or more accounts. Businesses that had one or more accounts with government(s) were provided with two possible options for managing these accounts:

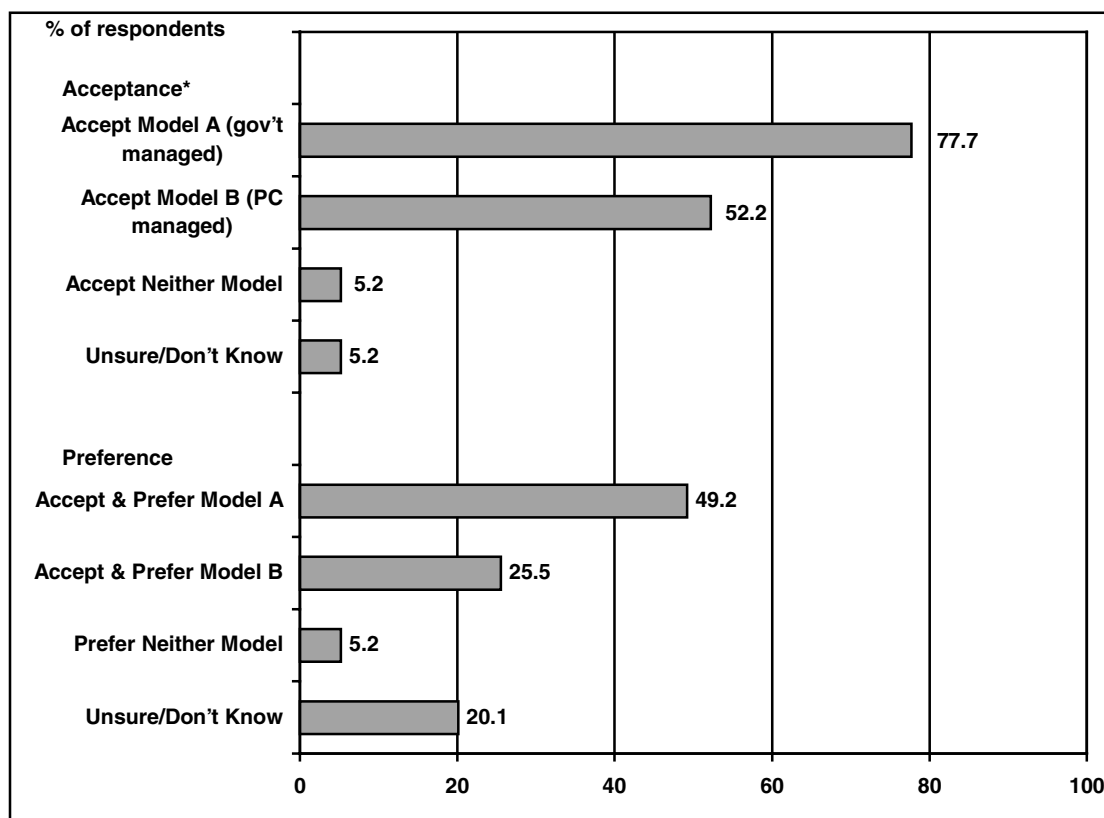
Model A: Account information for all of the individual services that the business deals with would be managed by a single government site (i.e., the single government access point would know about all of the business accounts with various government organizations).

Model B: The business has a PC program that would know how to access every government access point and would update the various government accounts (the company would have to purchase and maintain the program, but dealings with each government account would be separate and under the control of the business establishment).

As highlighted in Chart 7-2, among those businesses that had one or more accounts, there is a high level (77.7%) of support for Model A. Also highlighted in the chart, 52.2% of business respondents find Model B acceptable. In addition to defining the "acceptance" of either model, respondents were asked to indicate their specific preference.

As detailed in Chart 7-2, when asked to indicate their preference, approximately one-half (49.2%) of business respondents prefer Model A, with just over one-quarter (25.5%) of respondents citing a preference for Model B. A significant proportion (5.2%) prefer neither model or are unsure as to preference (20.1%).

Chart 7-2
Business Acceptance and Preference for
Identified Account Management Models
(those businesses with one or more accounts)



* Totals may add to more than 100% for acceptance questions due to multiple responses

Analysis of the data suggests that there are no significant differences in acceptance of either Model A or Model B on the basis of organization size, number of accounts or type of government (federal, provincial, municipal).

7.3 Service-Delivery Preferences

Business respondents were asked to comment on whether the private sector should assume a greater role in the provision of specific government services. In particular, respondents were asked whether they would prefer to deal directly with government or with a private company, or whether both were equally acceptable.

The service-delivery issues examined included

- getting information from government – searches of government databases, on-line information of all sorts;
- registering a business;
- reporting information to government; and

- making payments (e.g., fees).

Analysis of the information suggests the following:

1. While Canadian businesses are satisfied with government services, they are open to the idea of some private-sector delivery of government services.

Although fewer than one in ten business respondents notes that they would *prefer* the delivery of selected government services by private sector organizations, a significant proportion (ranging from 28.5% to 48%) indicates that delivery of such services by *either* government or the private sector was acceptable.

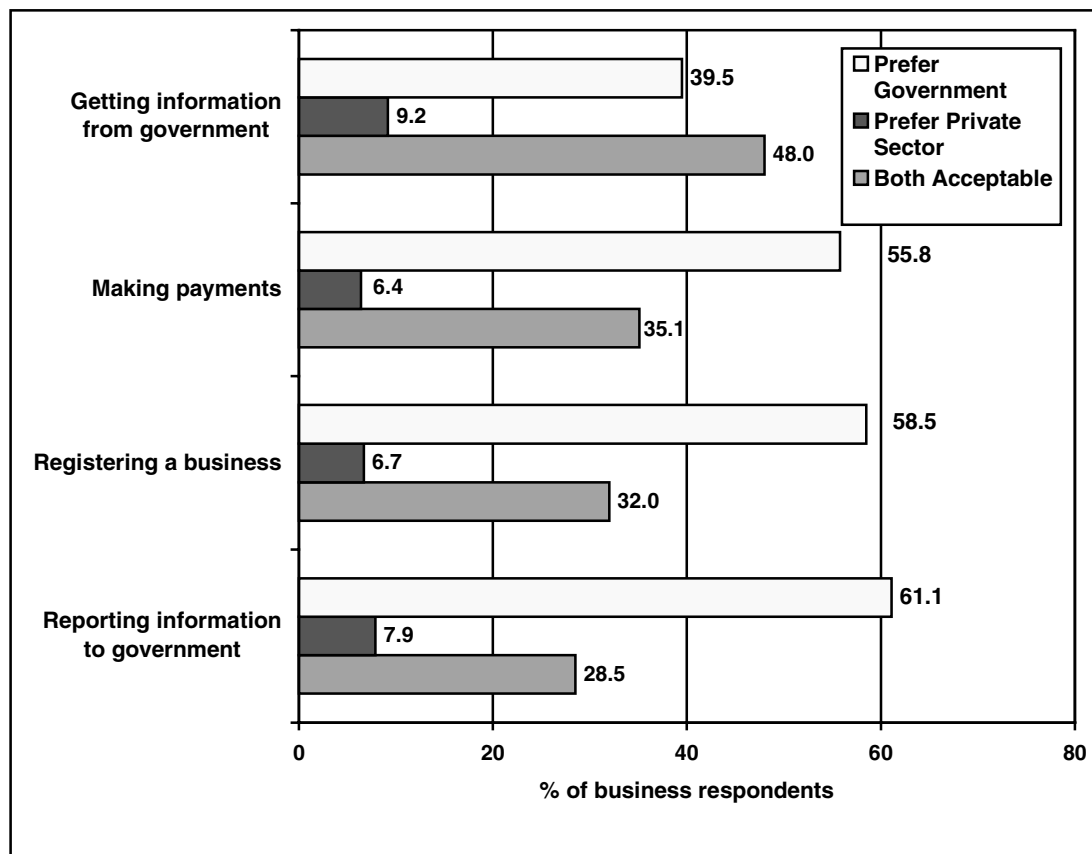
2. Businesses were more comfortable with private-sector involvement when obtaining information from government and making payments.

As highlighted in Chart 7-3, business respondents indicate that they would prefer the private sector (9.2%) or would accept either the private sector or government (48%) when obtaining information from government. In contrast, a lower proportion of respondents feel that it is appropriate for the private sector to report information to government (7.9% prefer private sector, 28.5% noted that both were acceptable).

Overall, many business respondents cite concerns about privacy, service and ability to provide the service on a cost-effective basis as reasons for *not* supporting the delivery of selected services by the private-sector or third-party service provider.

Business respondents would prefer it if government retained many of the current functions, including business registration and reporting information to government.

Chart 7-3
Business Preference for the Delivery of Selected Government Services



n=1,921 (unweighted)

Note: Totals will not add to 100% due to "unsure/don't know" responses

7.4 Selected Business Issues – Implications for Service Delivery

1. Canadian businesses are supportive of more “on-line” service-delivery channels.

Despite the relatively low proportion of business clients who reported information (21.1%) or made non-CCRA payments on-line (10.3%), many businesses are supportive of more on-line services. It should be noted that while more than one-half (52.2%) of business respondents are supportive of moving to a model whereby all routine business would be completed via the Internet, approximately one-quarter (23.2%) of business clients do *not* support such a concept.

2. There is some scope to introduce some third-party delivery of government services.

Survey results do not indicate any particular support for the third-party delivery of services of typical government services, as the proportion of respondents who would prefer a private-sector organization rather than a government organization is less than 10%. However, a significant proportion of business respondents indicate that they would be indifferent to whether either the private sector or public sector delivered services, as long as the delivery organization provided good quality service. For example, almost one-half (48%) of business respondents feel it is acceptable for either a private- or public-sector organization to deliver services associated with the provision of information. In contrast, a much lower proportion (28.5%) is of a similar opinion regarding the management of information flowing *to* government.

Chapter 8. The Digital Identity

Business and citizen clients were asked several questions about possible future directions for the delivery of single-window services.

Both business and citizen clients were asked to provide their perspectives regarding future directions for government single-window services. Issues explored in the survey included

- possible consolidation of “electronic identities”;
- support for greater integration of government service channels; and
- suggested improvements for the delivery of government single-window services.

Since the survey component of this research project was conducted prior to September 11, 2001, it is difficult to predict how this reflects current opinions.

8.1 Opinions about Possible Consolidation of “Electronic Identities”

In the future, accessing government services on-line might require an “electronic identity” that would help ensure the security of the information and confirm the identity of the submitting individual and/or organization. Such identities could also prevent unauthorized access to information about the individual/organization.

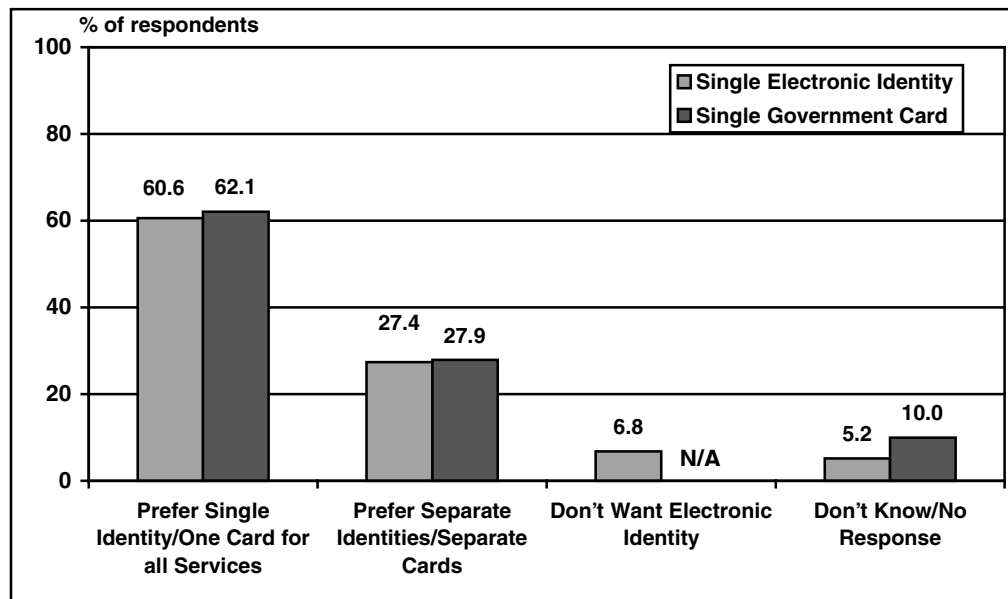
To provide direction to government, respondents were asked to comment on two issues:

- whether they would prefer one electronic identity to access all government services or a separate identity requiring a unique password for each service; and
- whether they would prefer to have separate identity cards for each service (e.g., driver’s license, health care, passport) or one card for all government services.

As highlighted in Chart 8-1A, there is significant support (60.6%) for a single electronic identity. As also highlighted in the chart, there is a high level of support (62.1%) for a single identity card for various government services.

There is a high level of support for consolidating multiple identities into a single identity or card.

Chart 8-1A
Support for Single Electronic Identity and Single Card
for Government Services



n=3,792 (weighted)

As detailed in Table 8-1, there are marked differences in preferences with respect to single electronic ID and a single government card:

- support for either a single electronic identity or a single government card is highest among those individuals who accessed municipal services and lowest among those individuals who accessed federal services;
- individuals who first accessed government services using the Internet were the most supportive (76.1%) of a single electronic ID; and
- support for a single government card for a range of government services was high across all groups.

Individuals who accessed government services via the Internet are most supportive of a single electronic ID.

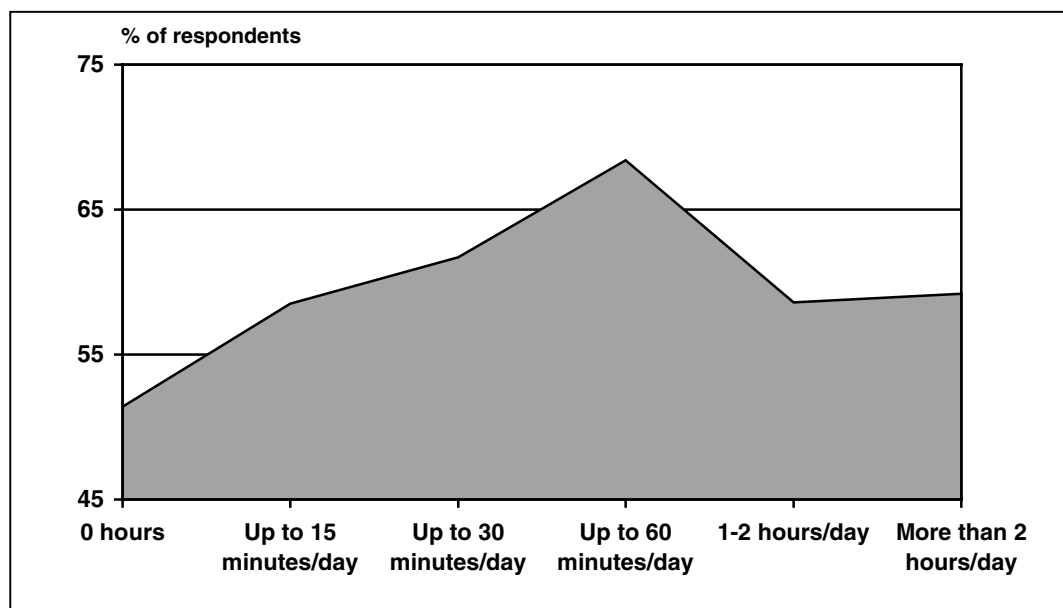
Table 8-1
Business/Citizen Receptiveness to Single Electronic/Government Card,
by Selected Characteristics

Group/View	Single Electronic Identity				Single Government Card		
	Prefer single electronic ID	Prefer separate ID's	Do not want ID	Don't know/unsure	Prefer one card	Prefer separate cards	Don't know/no response
Survey Average	60.6%	27.4%	6.8%	5.2%	62.1%	27.9%	10.0%
Group:							
Business	66.9%	22.6%	5.5%	4.9%	65.4%	25.8%	8.8%
Citizen	54.1%	32.2%	8.1%	5.6%	58.7%	30.0%	11.2%
Organization:							
Federal	57.5%	32.5%	5.6%	4.4%	55.6%	35.1%	9.3%
Provincial	60.1%	27.3%	7.8%	4.9%	64.1%	25.1%	10.7%
Municipal	63.1%	25.3%	5.4%	6.2%	61.0%	30.1%	8.9%
Channel first used:							
Telephone	60.3%	28.4%	6.2%	5.2%	62.8%	27.5%	9.7%
Walk-in	58.5%	27.6%	8.6%	5.4%	60.1%	28.2%	11.7%
Internet	76.1%	22.0%	0.5%	1.3%	69.7%	26.3%	4.2%
Number of different accounts (business only)							
0	66.4%	21.4%	6.9%	5.3%	63.6%	26.2%	10.2%
1	71.0%	22.3%	3.6%	3.1%	64.9%	27.9%	7.2%
2-5	70.1%	21.6%	4.6%	3.7%	68.6%	25.9%	5.5%
more than 5	64.5%	26.4%	4.5%	4.5%	76.4%	16.4%	7.2%

n=1,921 Businesses (unweighted) and 1,871 Citizens (weighted)

Although individuals who first accessed government services via the Internet are the most supportive of a single electronic identification, this support diminishes among frequent/heavy Internet clients. For example, as highlighted in Chart 8-1B, such support exhibits a bell curve effect – suggesting that those individuals most knowledgeable about the Internet might also have concerns about Internet security.

Chart 8-1B
Support for Single Electronic Identity,
by Personal Time Spent on the Internet
(hours/day)



Those individuals who spend a considerable amount of time (more than 1 hour per day) on the Internet are concerned about a single electronic identity.

8.2 Digital Identity – Service-Delivery Implications

1. Overall, 60% of respondents are supportive of the concept of a single electronic identification.

Overall, just under two-thirds (60.6%) of respondents are supportive of the concept of a single electronic identification that would allow access to a range of government programs and services. However, this support is not uniform across the various survey strata: businesses were more supportive of a single ID (66.9%) than are citizen respondents (54.1%). Similarly, a high proportion (62.1%) of respondents (business and citizens) are supportive of the concept of a single card that could be used for multiple government programs.

Chapter 9. The "One-Stop" Shop

Business and citizen respondents were asked a series of different but related questions pertaining to several key issues, including

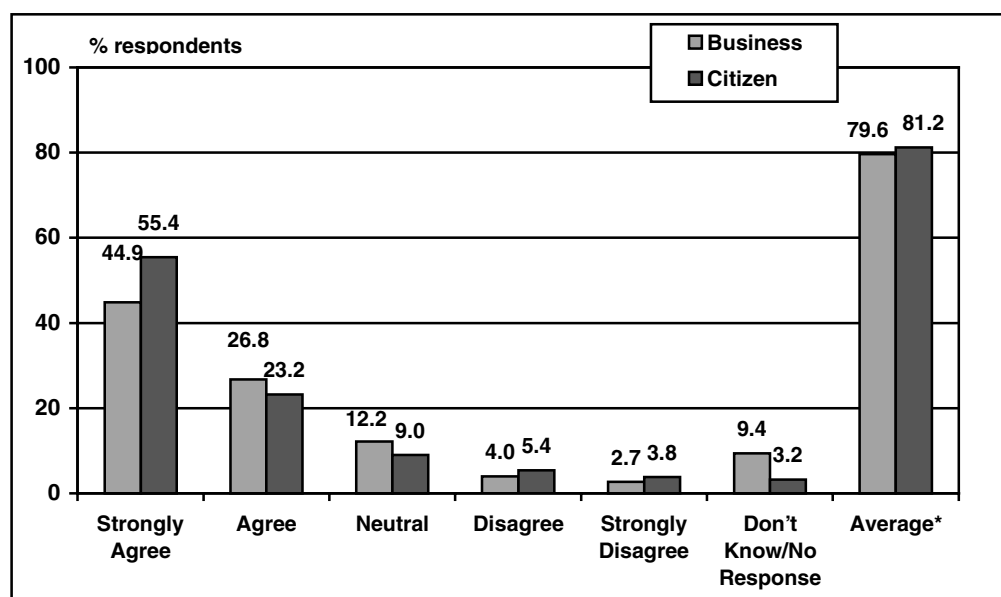
- the need for greater integration of government services (i.e., “one-stop” shop); and
- the need for expansion of electronic service delivery (Internet, kiosk) among government organizations.

9.1 Need for Greater Integration of Government Services (“One-Stop” Shop)

Business and citizen respondents were asked about the extent to which they supported the consolidation of municipal, provincial and federal government services – to “seamlessly” link them..

As highlighted in Chart 9-2A, there is significant support for the integration of government services, as 79.6% of business and 81.2% of citizen respondents would prefer a “one-stop” shop for government services.

Chart 9-2A
Support for Better Integration/“One-Stop” Shop for Government Services, Business & Citizen Respondents



n=1,971 Businesses (unweighted) and 1,871 Citizens (weighted), *Common Measurements Tool Scale

As highlighted in Chart 9-2B, support for a one-stop service varies across service groups:

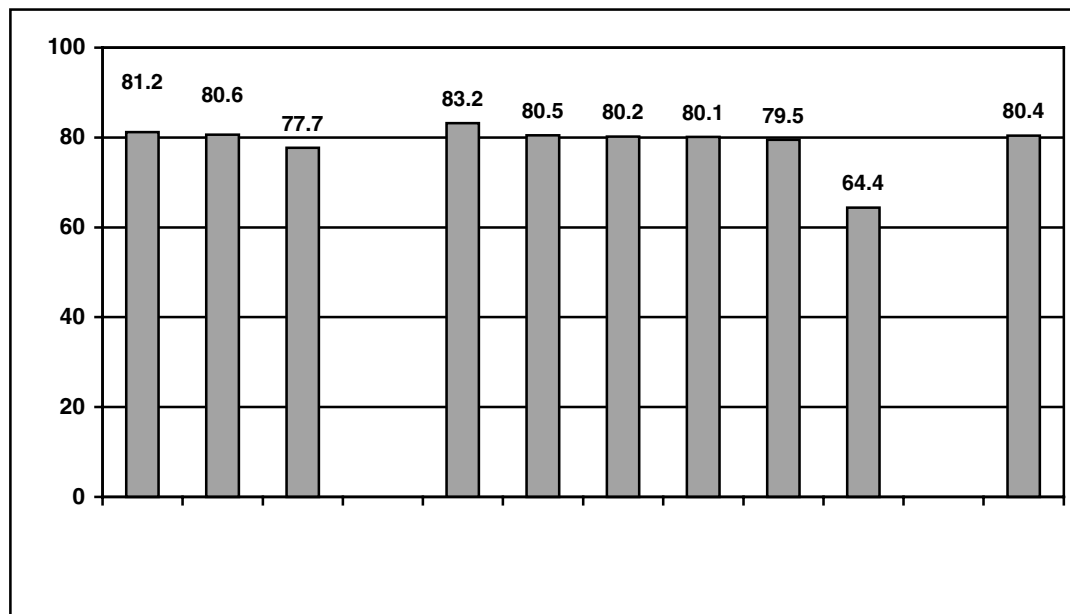
- citizen individuals who accessed provincial services are more strongly in favour of one-stop services (81.2%) than are those who accessed municipal services (77.7%);

More than three-quarters of respondents are supportive of the concept of seamlessly linking government services.

Citizen clients who utilized federal services are more supportive of a “one-stop” shop than are those clients who accessed municipal services.

- citizen/business respondents who used an “electronic” service channel are more supportive of one-stop services than are those who accessed such services by fax or mail.

Chart 9-2B
Support for “One-Stop” Services – Selected Groups*
 (% Agree)



n=3,792 (weighted), *Common Measurements Tool Scale

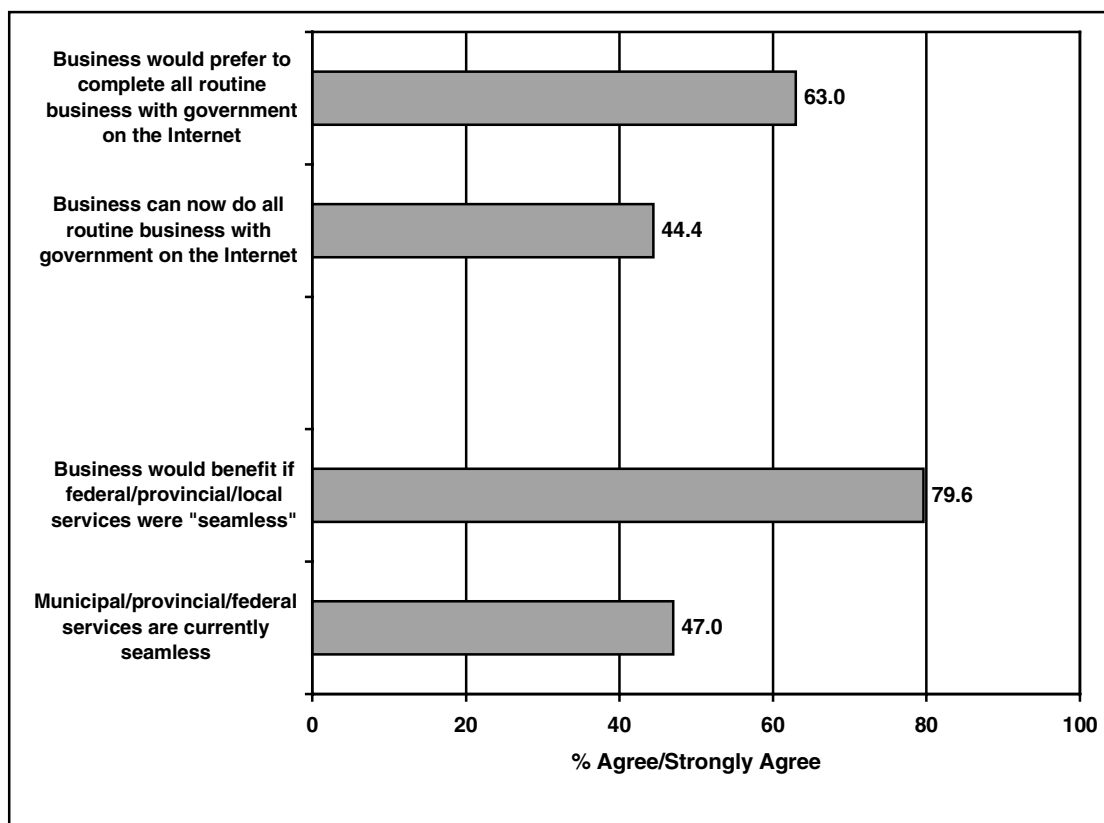
Service Lesson:

Governments should pursue the possibility of combining service delivery through a single entry point – whether it be an office, call centre or Internet portal.

9.2 Business Identification of “Gaps” in Service Delivery – Selected Issues

Business respondents were also asked to identify the importance of government providing opportunities to complete most or all routine business with government on the Internet. As highlighted in Chart 9-2C, although 63% of business respondents would prefer to complete all routine business on the Internet, or other electronic systems, only 44.4% feel that they could currently conduct all their transactions via this channel. Similarly, there is a large gap between the importance of having municipal, provincial and federal seamlessly linked (79.6% agreed that this would benefit their business) and the extent to which such services were actually “seamless” (47%).

Chart 9-2C
Business Opinion about
Seamless Delivery and Use of the Internet*



n=1,923 (unweighted), *Common Measurements Tool Scale

9.4 Suggested Improvements for the Delivery of Government Single-Window Services – Citizen Sample

In addition to assessing the need for a “one-stop” shop for the provision of government services, citizen respondents were asked to indicate whether more services should be available through kiosks and the Internet. Participants were also asked about the extent to which they believe governments are innovative regarding improved service delivery.

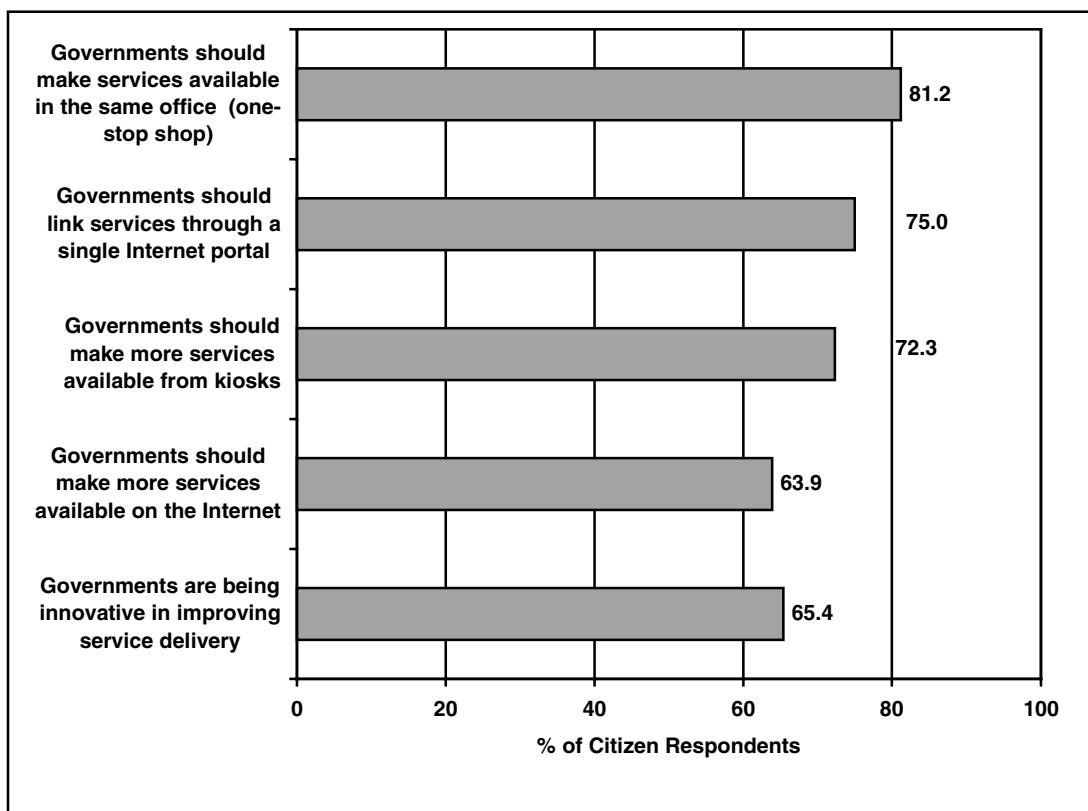
As highlighted in Chart 9-3A, respondents are most positive about the concept of one-stop services (81.2%) and the provision of a single Internet portal (75%).

Only one-quarter of business respondents think that there is seamless delivery of government services.

Citizen respondents were asked to comment on possible options for single-window services.

Moving to electronic service delivery is supported by a majority of citizen respondents.

Chart 9-3A
Citizen Opinion about One-Stop Shops and Channel Integration*



n=1,871 Citizens (weighted), *Common Measurements Tool

Note: Totals will not add to 100% due to neutral and "don't know" responses not shown

9.4 "One-Stop" Shop – Implications for Service Delivery

Business and citizen clients provide some insight as to preferred future directions such as a "one-stop" shop and Internet services. While there is not unanimous agreement as to these directions, there is significant support for changes in the way governments currently deliver services. The salient points associated with possible future directions are discussed below.

1. Survey results suggest that there is broad-based support for the expansion of "one-stop" shop on-line services.

Analysis of the data suggests that there is broad-based support for the expansion of electronic services:

- The Internet channel has the highest gain of any channel in terms of preferred future preference.
- Many citizen (57.9%) and business (51.7%) clients would like to be able to access all or some services via the Internet.

- Clients who accessed the Internet for services are the most satisfied.

Notwithstanding support for the expansion of electronic services, an examination of the various client profiles underscores the need to provide “traditional” (telephone, walk-in) services for those individuals who might find it difficult to access government services on-line.

2. A majority of citizen and business clients would like to see a more “seamless” delivery of services across the various government organizations.

More than three-quarters of citizens (81.2%) and (79.6%) of business respondents are supportive of the concept of seamless service delivery (business) or a “one-stop” shop (citizen) concept. Support for the “one-stop” shop is highest among those clients who accessed services from a federal organization.

Chapter 10. Conclusions

Analysis of the information provided by business and citizen respondents suggests that, on average, Canadians are very satisfied with the services provided through “single-window” organizations. As highlighted in the report, there are some differences in satisfaction between citizen and business participants. Below are the key findings of the study.

Citizens and businesses are very positive about their experiences with the single-window services in this study.

Overall, the results of the survey suggest that both citizen and business respondents are generally satisfied with the services provided through the various single-window service organizations that participated in this study. More than four in five clients surveyed indicate that they are satisfied with the services they received.

No single channel can be identified as being the “best channel.”

Analysis suggests that when clients receive service the first time within an appropriate length of time, they are generally very satisfied with the service provided – irrespective of the channel used. For example, among those clients who obtained their required service upon their first contact, satisfaction ranges from 88.9% among those individuals who accessed telephone services to 75% among clients accessing service via fax.

It should be noted that certain channels appear to be better in terms of reducing the need for subsequent visits. For example, while 74% of walk-in clients report that they obtained their required service upon their first visit, a lower proportion of Internet (57%) or telephone (37%) report that they obtained their required service upon their first visit.

Ability to obtain service on their first visit and timeliness of service are key drivers in terms of client satisfaction.

The results of the survey suggest that client satisfaction is closely related to the ability to obtain the required service on first contact and the extent to which such service is provided in a timely manner. For example, client satisfaction declines by almost 50% when individuals are required to make three or more contacts to obtain the desired service. Similarly, there is a marked decline in client satisfaction when the time required to obtain the desired service exceeds one hour.

There are opportunities to review services that should be provided through different channels.

Clients access single-window services for a variety of purposes. Given the range of requirements, and the extent to which they require a financial transaction, verification of information and/or completion of application or registration forms, it is unlikely that all channels can provide all services required by both citizen and business clients. As noted in the report, it appears that some channels may be better at providing selected services than would other channels. In this context, governments may wish to tailor the services provided through each channel.

Canadians desire single-window services that offer multiple access.

The results of the survey suggest that there is no one single channel that can be described as the “best channel.” Although survey data suggest that an increasing proportion of Canadians wish to access such services via electronic mediums (Internet, kiosk), more than two-thirds of clients surveyed still prefer accessing services using channels that allow for “personal” contact (i.e., walk-in, telephone services).

Canadians are supportive of integration of government services into a “one-stop” shop.

There is a high level of support for greater integration of federal, provincial and municipal services into a “one-stop” shop: almost three-quarters of business and citizen respondents are supportive of seamless or “one-stop” shop service delivery. In addition, survey respondents are generally supportive of the tools that would allow such seamless delivery, as just under two-thirds (60.6%) of respondents are supportive of a single electronic identification and a similar proportion (62.1%) of respondents (business and citizen) are supportive of a single card that could be used to access either federal, provincial and/or municipal programs or services.

Chapter 11. Improving Single-Window Service Delivery: An Action Plan

The results of *Clients Speak: A Report on Single-Window Government Services* are based on an extensive survey of a large sample of citizen and business single-window clients. Although both business and citizen clients express a high level of satisfaction with single-window services provided through all levels of government, there are several initiatives that governments could undertake to further enhance the delivery of single window services to Canadian citizens and businesses alike:

1. Recognize the Unique Needs and Diverse Requirements of Citizen and Business Clients – Know the Clients

- “One-stop” shop does not mean that one process or one channel fits all clients – services must be tailored to meet the needs of the different client groups.
- Business clients express lower levels of satisfaction than do citizens – partially reflecting their inability to obtain the required service the first time. Single-window providers must become more knowledgeable about their small-business clients.
- Service providers need to recognize that their clients are not homogenous: there are at least three distinct client groups who access single-window services.

2. Accelerate Efforts to Promote Seamless Service Delivery

- Business and citizen clients are supportive of seamless service delivery across government organizations – governments need to explore opportunities for greater integration of services.
- Investigate the development of the tools (i.e., single electronic identification, single government card) that will support seamless service delivery.

3. Provide Service the First Time

- Examine service channels to maximize the likelihood of clients obtaining their required service the first time.
- Examine business requirements to help ensure that businesses have access to the information services that they require.

4. Communicate with Clients

- Improve marketing and communications – clients need to know how to access services.
- Acknowledge that clients should have choices in terms of accessing services.

- Address business and citizen concerns about security and privacy issues.

5. Continue to Expand Electronic Service Delivery

- Build on the client satisfaction and loyalty to electronic service-delivery channels.
- Provide linkages to other channels to allow for some personal contact with service providers.
- Continue to provide service channel options for individuals who are not comfortable with the Internet or e-services.
- Where appropriate, develop educational program/workshops to help clients make the transition to electronic service-delivery channels.

APPENDIX A. ORGANIZATION DESCRIPTIONS

Canada Business Service Centres (Industry Canada), a partnership of federal departments and provinces/territories, provides an integrated access point for information on business programs, services and regulations through the client's choice of modes: telephone, in-person and Internet.

Service Canada is a network of one-stop access points providing basic information on programs and services of the Government of Canada. This network brings together: Access Centres across Canada, the "O-Canada" toll-free telephone service, and an Internet portal.

BC Government Agents has 59 offices across the province, providing British Columbians with one-stop access to hundreds of integrated government services for provincial ministries, agencies and organizations.

Ontario Business Connects, part of the Integrated Service Delivery Division, Ontario Ministry of Consumer and Business Services, is dedicated to streamlining and simplifying business access to government in Ontario. It is primarily concerned with the development of governance and service-delivery partnerships and the development of standards, protocols and components influencing the development of electronic service-delivery infrastructures.

Ontario Government Information Centres provide the public with a one-stop resource centre for information on many of the services provided by the Government of Ontario. Among the services provided at Government Information Centres:

- common government forms, such as request for birth, marriage or death certificates and applications for drivers' license;
- answers to frequently asked questions about services provided by the provincial and other levels of government;
- on-line registration of an unincorporated business through an Ontario Business Connects workstation;
- electronic ordering of government publications; and
- access to government websites.

Service New Brunswick is the provincial government's chief provider of front-line services to the public. It provides one-stop delivery of provincial government services, operates New Brunswick's real-property information service, operates New Brunswick's personal property registry service, assesses all land, buildings and improvements for property taxation purposes and operates the province's Property Assessment and Taxation System. Service New Brunswick also maintains New Brunswick's land information infrastructure.

Government of Northwest Territories offers a wide range of government single-window services through telephone, walk-in, mail and Internet channels.

Service Nova Scotia and Municipal Relations has offices in 54 communities across the province. Some specialize in deeds, some in assessment and some offer an array of services like driver licensing, residential tenancies, vehicle registration and debtor counselling.

Region of Halton is a regional-level government that serves four municipalities: Towns of Oakville, Milton, Halton Hills and the City of Burlington.

Enterprise Toronto is an innovative public- and private-sector alliance created to provide one-stop sourcing of services and programs tailored to meet the needs of the City's Entrepreneurs and small businesses.

City of Vancouver provides single-window service to citizens via the revenue services division. These services include property tax, utility, bylaw fines, billing and collections. In addition, the building and development communities of Vancouver use the centralized service centre during the total life cycle of a project, from inception to completion.

APPENDIX B. SURVEY COMPLETIONS BY ORGANIZATION

Organization	Number Received	NIS	Non-Qualifier	Valid Sample	Refusals*	Total Surveys	Response Rate (Valid)
Industry Canada	517	82 (15.9%)	45 (8.7%)	390	56	259	66.4%
Service Canada	503	118 (23.5%)	39 (7.8%)	346	52	237	68.5%
Ontario Gov't Information Centres	309	16 (5.2%)	16 (5.2%)	277	33	219	79.1%
Ontario Business Connects	922	50 (5.4%)	36 (3.9%)	836	133	528	63.2%
Region of Halton	539	53 (9.8%)	22 (4.1%)	464	41	363	78.2%
City of Vancouver	914	127 (13.9%)	59 (6.5%)	728	140	401	55.1%
Enterprise Toronto	876	149 (17.0%)	103 (11.8%)	624	135	332	53.2%
Service New Brunswick	2,044	118 (5.8%)	78 (3.8%)	1,848	205	1,448	78.4%
Gov't of BC	626	46 (7.3%)	43 (6.7%)	537	81	427	79.5%
Gov't of Nova Scotia	800	82 (10.3%)	24 (3.0%)	694	84	517	74.5%
Gov't NWT	135	18 (13.3%)	14 (10.4%)	103	14	75	72.8%
Total	8,185	859	479	6,847	974	4,806	70.2%

* Businesses or citizens that preferred not to participate

** Not-in-service numbers

APPENDIX C. RESEARCH CAVEATS

While the results presented in this report are based on 4,806 client surveys, there are certain limitations associated with the information obtained. The Consultant has identified the following possible caveats:

- ◆ ***Lack of participation by all provinces and territories.*** Although this survey is national in scope, it is not representative of all organizations across Canada, since it included only eleven government organizations.
- ◆ ***Possible sampling error.*** While the data obtained from this survey can be viewed with relative confidence given the high response rate, there is always a possibility that the data collected are not an exact representation of the population. However, due to the very low error estimate of $\pm 2.5\%$, it is unlikely that sampling error had any significant effect on the findings. While the data for the sample as a whole can be viewed with considerable confidence, the sampling error will be higher when reviewing the results at the regional level.
- ◆ ***Data represents a “snapshot” of respondent input.*** As the data collection for this project was undertaken during a single time-period, from June 2001 to August 2001, the data represent only a “snapshot” of respondents’ situations at that point in time. In this context, the data collected refers to clients’ current status and opinions at the time of the survey and may, or may not, be reflective of the future opinions and circumstances of respondents.

Although there is a possibility that these research limitations could influence the findings, the participation of more than 4,800 individuals in this research project indicates that the results can be viewed as a good approximation of the overall strengths and weaknesses of government single-channel services and the channels used.