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Local Land Services (LLS)

State-wide Customer Focus Survey

Executive summary

Prepared For
Contact
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Reference

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1. Executive summary

Key findings from private land managers

Private land managers are very satisfied with their life overall with almost half (49%) rating their life overall as 9 or 10 out of 10. The mean score for all 2200 private land managers surveyed was 8.42 out of 10 which is significantly higher than the Australian average score of 7.3¹. Nevertheless there remains a small group of private land managers who are not satisfied with life at all with 8% rating their satisfaction with life as lower than six out of 10.

Ideas for future LLS surveys were canvassed. A survey in the mail or online are possible with 88% and 84% of private land managers agreeing they could do it these ways. However recent experience with private land managers tells us few will get around to completing it online. The greatest proportion (43%) prefer a telephone survey and this survey proved the telephone methodology with a high level of private land manager acceptance. Few rejected the chance to have their say. However a significant number indicated they would prefer to do the actual survey in future online (29%), 15% by post and 11% face to face.

More than half the private land managers (56%) managed only one property. One in five (20%) managed two and 12% three while 12% of private land managers manage four plus properties.

Almost six in ten private land managers (59%) made 100% of their income by farming and another 16% mainly made their income through farming. However about a quarter of private land managers (24%) mainly got their income or entirely got their income from off farm sources.

It is a motherhood statement that private land managers think it important they pass on their land in better condition than they got it – 95% agree this is important to them.

Whilst only being in existence for a relatively short time almost all private land managers have heard of Local Land Managers (LLS) when prompted. When compared to the Murray LLS study conducted in early 2015 only 76% when prompted had heard of LLS. Prompted awareness of LLS appears to be rising rapidly.

Awareness of LLS is relatively consistent across the state with the exception of Greater Sydney region where there is a higher proportion of land managers deriving income off farm.

Agricultural advice dominates the needs of private land managers from LLS – 89% want access to this service.

The most used LLS services were pest and animal management programs (43%) and administration (37%).

There were high levels of satisfaction with 66% of private land manager customers extremely satisfied (8, 9 or 10, out of 10). A further 9% were satisfied (7 out of 10) and 23% expressed varying levels of dissatisfaction.

Engagement with LLS occurred on the telephone (47%), in person at LLS office (26%) and in person at their own property (18%) or field days (9%). Email has emerged as a potential future channel.

¹ Source: OECD Better Life Index December 2014

About three quarters of customers have no significant issues with the LLS forms; about one in ten do have issues which aligns closely with the level of suspected illiteracy in the wider Australia community. Some people struggle to understand forms of any kind.

While most private land managers rated the frequency of contact they have with their local LLS as about right (79%); 19% would like more and very few less contact.

About one in seven customers (13%) reported having made a complaint at some stage to LLS.

There were a significant proportion of the complainants (the 13% who have complained who reported the complaints process as being difficult/very difficult (22%), of poor quality (25%) and very slow (24%).

Telephone (56%) and in person (33%) were the main channels for complaints. This result reinforces the need for a good CRM system(s).

Just under half (46%) rated themselves as extremely satisfied with LLS over the last 12 months, 14% as satisfied and 36% are neutral to dissatisfied. 4% aren't sure.

Net Promoter Score is a customer loyalty metric based on "Promoters" customers who are enthusiastic and loyal, and 'promote' LLS to their friends and family. "Passive" customers are happy but can easily be tempted to leave by an attractive alternative. Passive customers may become promoters if LLS improves its product, service or customer experience. "Detractors" are unhappy, feel mistreated. Detractors have an increased likelihood of warning potential customers to stay away from LLS. The Net promoter score is low at minus 41. There are many more detractors than there are promoters $19-60 = -41$

What's driving satisfaction and dissatisfaction?

Regression analysis has been able to show that satisfaction with LLS staff is closely linked to whether they do what they promise, are accountable for their actions and work hard to alert land managers to new ideas.

For satisfaction with LLS as an organisation over the last 12 months the study found that it is closely linked to whether LLS is seen to perform its functions well, provides good customer service, is prepared to be accountable for its actions and where LLS staff have been seen to alert private land managers to new ideas and provided good value services.

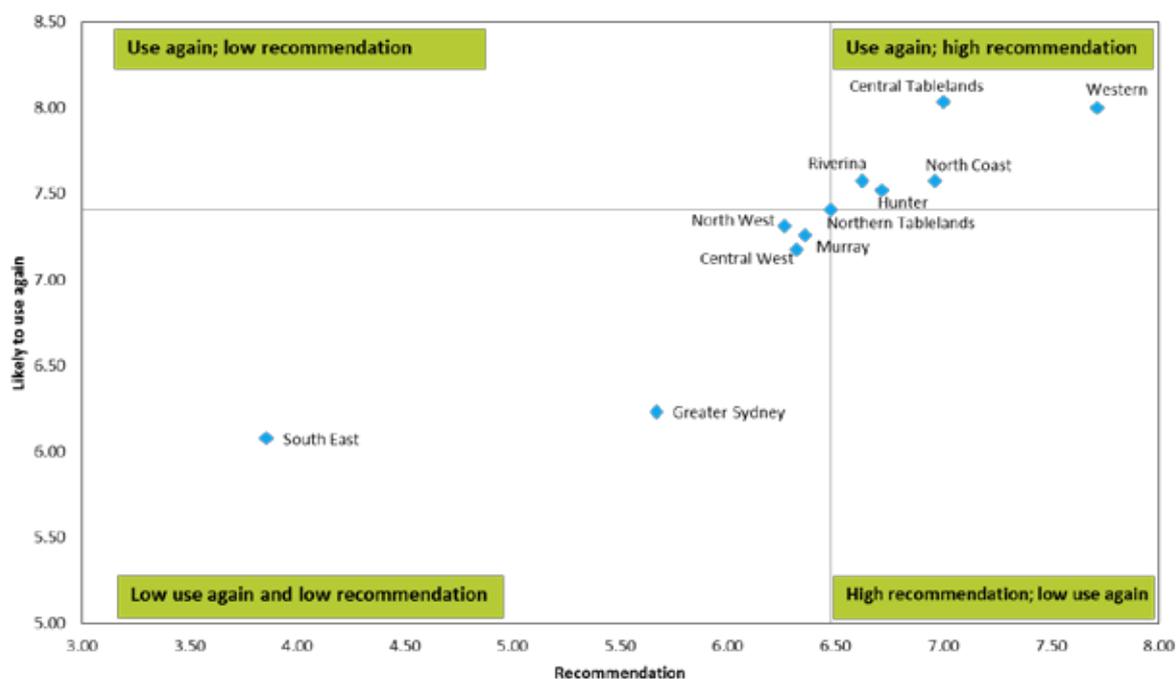
When private land managers determine whether they will use LLS again it depends mainly on perceptions of good service, the degree to which staff could see things from the customers' perspective and whether they alert them to new ideas.

Recommendation of LLS depends on accountability, being alerted to new ideas, LLS performing its functions well, staff being proactive and knowing what they are talking about.

Private land holders appear to be careful when recommending any organisation as there are quite low levels of promoters (those who score LLS 9 and 10) yet satisfaction scores are quite high.

Therefore, LLS should be careful when interpreting these Net Promoter Score (NPS). NPS is quite category specific and low scores can be attributed to category (e.g. we have found them to be low for superannuation for example). The value will be in comparing changes over time rather than in this benchmark measure itself. Nevertheless, Western, Central Tablelands, North Coast, Riverina and Hunter regions attracted both high levels of recommendation and intention to use again.

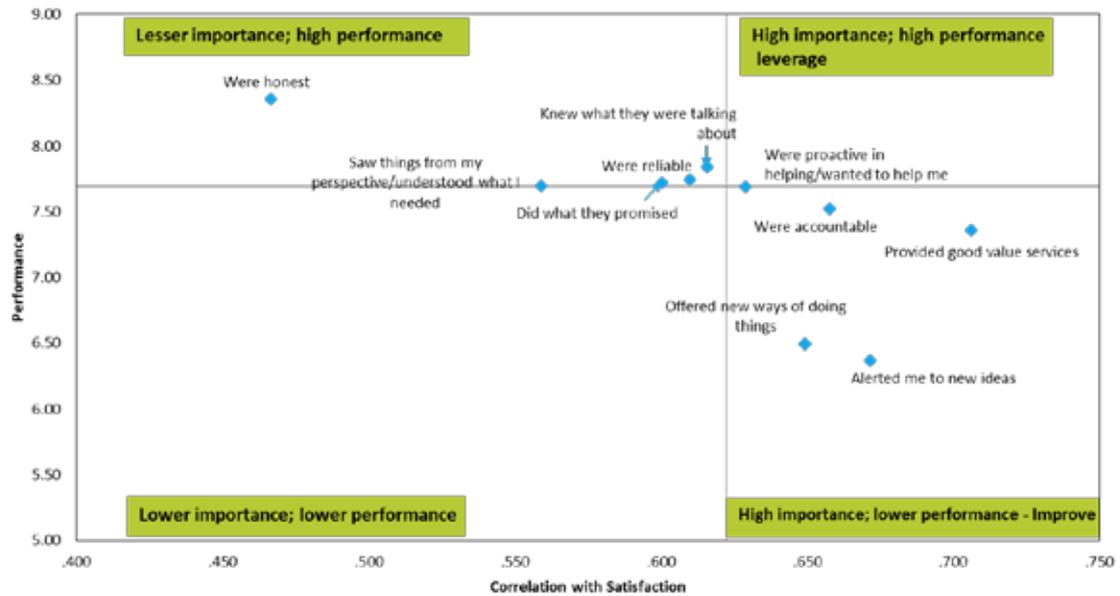
Figure 1: Likelihood to Use Again and Recommendation – Region



Areas for improvement in LLS values include enhancing the perception that it delivers good value services, is accountable, alert customers to new ideas and offers new ways of doing things.

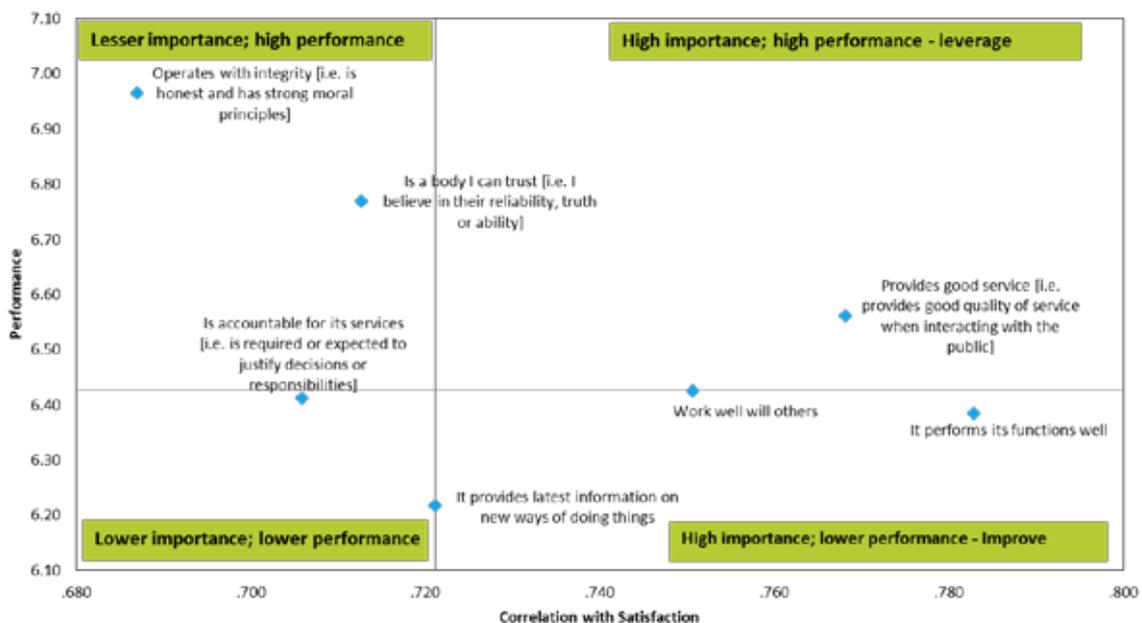
These aspects are of high importance to private land managers and currently LLS is scoring lower than the average for all the values measured.

Figure 2: Values of Local Land Services and Satisfaction



The analysis tells us that certain areas if improved will make a difference to overall satisfaction. Key amongst these are those aspects that are very important to customers and where the performance of LLS is lower. The key areas to be worked on by LLS is in building the perception amongst customers that LLS performs its functions well, works well with others and provides the latest information on new ways of doing things. These three aspects are priority areas to generate an improvement in overall satisfaction with LLS.

Figure 3: Values associated with LLS with staff and Satisfaction



Key findings from public land managers

Public land managers are also very satisfied with their life overall with a mean score of 8.20 out of 10. This level is not quite as high as for private land managers who had a mean score of 8.42. Just over a third of public land managers (36%) rate their life overall as 9 or 10, out of 10 while it was 48% for private land managers. A similar proportion as private land managers (8%) also rate their life satisfaction as low.

Prompted awareness of LLS is very high with public land managers at 97%.

Just under seven in ten (69%) of public land managers are highly satisfied and 13% quite satisfied with their last experience while 18% are neutral to dissatisfied with their last experience with LLS.

As with private land managers, most public land managers (89%) are happy with the frequency of contact while 11% want more contact from LLS.

Two thirds of public land managers think LLS forms are fine and about one in ten do not. A quarter haven't had to complete any LLS forms and were unable to make any relevant comment.

Just under one in ten (8%) of public land managers reported having ever made a complaint to LLS.

Of the small number of public land managers who had ever had a complaint, only 8% of the 166 public land managers interviewed rated the ease of complaint handling as difficult while 67% felt the making of a complaint was easy. One third of complainants (33%) rated the quality of complaint handling as having been very poorly handled; and only 17% as being very well handled. The remainder were neutral on these aspects.

One third (33%) also rated the speed of complaint handling as very poorly handled; and 8% as very well handled.

Just under six in ten (57%) public land managers rated their satisfaction over the last 12 months with LLS as very satisfied, 17% as satisfied while 27% were neutral to dissatisfied.

Almost all (89%) of public land managers are likely to use LLS again while 10% are neutral to unlikely to use LLS services again.

Public land managers have a positive net promoter score of +24 for LLS which is in contrast to the negative score delivered by private land managers. The main reason for the better score is that many more public land managers are active promoters (that is scoring LLS 9 or 10 out of 10) and many fewer are detractors which score LLS 1-6 out of 10.

From the perspective of public land managers, the strongest attributes of LLS are its trustworthiness, integrity and good service provision.

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