

2021
Taxpayer Satisfaction Survey
Results

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EXECUTIVE SUMMARY

INTRODUCTION

Improving the customer experience is one of the Department of Revenue's (DOR/Revenue) four goals. We strive to "build relationships and empower success" to meet our customers' needs, expectations, and to provide the highest level of service possible.

Surveys are one way we collect data from our customers to measure progress and identify customer needs and expectations. The 2021 Taxpayer Satisfaction Survey (TSS/survey) provides a fresh opportunity to see Revenue as our customers see us and gives us a roadmap to meet their expectations.

BACKGROUND

Revenue has been conducting a Taxpayer Satisfaction Survey since 1992. For many years, we partnered with Washington State University's Social & Economic Sciences Research Center to conduct the survey every two years. In 2018, we began conducting the survey annually.

TRENDS, CHANGES, AND SIGNIFICANT OBSERVATIONS

The continued impact and stresses of the COVID-19 pandemic on taxpayers has been reflected in many of the responses and response rate. Because of this impact, we are providing additional insights into the 2021 results in comparison with previous years.

Taxpayers responded very favorably when asked about the overall quality of service received from Revenue. Of the taxpayers that responded, 92.3% responded that they were "very satisfied" or "satisfied." When asked about their satisfaction level with their last interaction, we saw an 86.4% positive response.

We found taxpayers continue to prefer using email/secure messaging or telephone to interact with Revenue (76.1%).

When asked if taxpayers had contacted the call center in the past year, the 2021 survey saw an increase in the percentage responding "yes." In 2021, it increased to 36%. This is the first year to see an increase since 2016. This could have been due to the office closures that impacted in-person services during much of 2021.

SURVEY PROFILE

Method

The survey was sent to a random sample of Washington taxpayers. Out of 600,000 active taxpayers, 10,000 were initially selected to participate in the survey.

Criteria used for pulling the sample of taxpayers:

- Either a monthly, quarterly, or annual filing frequency.
- Tax accounts were open.
- Tax accounts type was excise.
- A return had been filed in the last 365 days.

To reach taxpayers at every level, big and small, they were broken into four cohorts based on number of business tax accounts and gross income. Median gross income was determined to be \$61,153. Large accounts had a gross income above the median. Small accounts have gross income less than or equal to the median. Group 1 consisted of taxpayers with one business. Group 2 consisted of taxpayers with 2 or more businesses. Here is the breakdown in table form:

	1 business/account	2+ businesses/account
<= Median Gross Income	Group 1 Small (46%)	Group 2 Small (4%)
> Median Gross Income	Group 1 Large (46%)	Group 2 Large (4%)

The number of selected taxpayers in each cohort matched the representative percentage of the cohort in the overall pool of taxpayers.

The selected taxpayers received an email with a link to the survey. The first message was sent out on Dec.13, 2021, with a follow up reminder message sent on Jan. 5, 2022. By Jan. 12, we had only received 214 survey responses. This is 388 less than the same time period for the 2020 TSS.

To reach a statistically significant response rate, we pulled and sent an additional 10,000 invitations. On Jan. 31, 2022, the survey closed. The final survey response rate was approximately 2.22%, with 444 responses. This is a decline of 5.68 percentage points compared to the 2020 response rate of 7.9% (786 total responses).

Response rate by cohort:

Cohort	Number of responses	% of total responses
Group 1 Small	229	51.5%
Group 1 Large	185	41.7%
Group 2 Small	18	4.1%
Group 2 Large	12	2.7%

Timeframe

Revenue conducted the survey between Dec. 13, 2021, and Jan. 31, 2022.

Where did our responses come from?

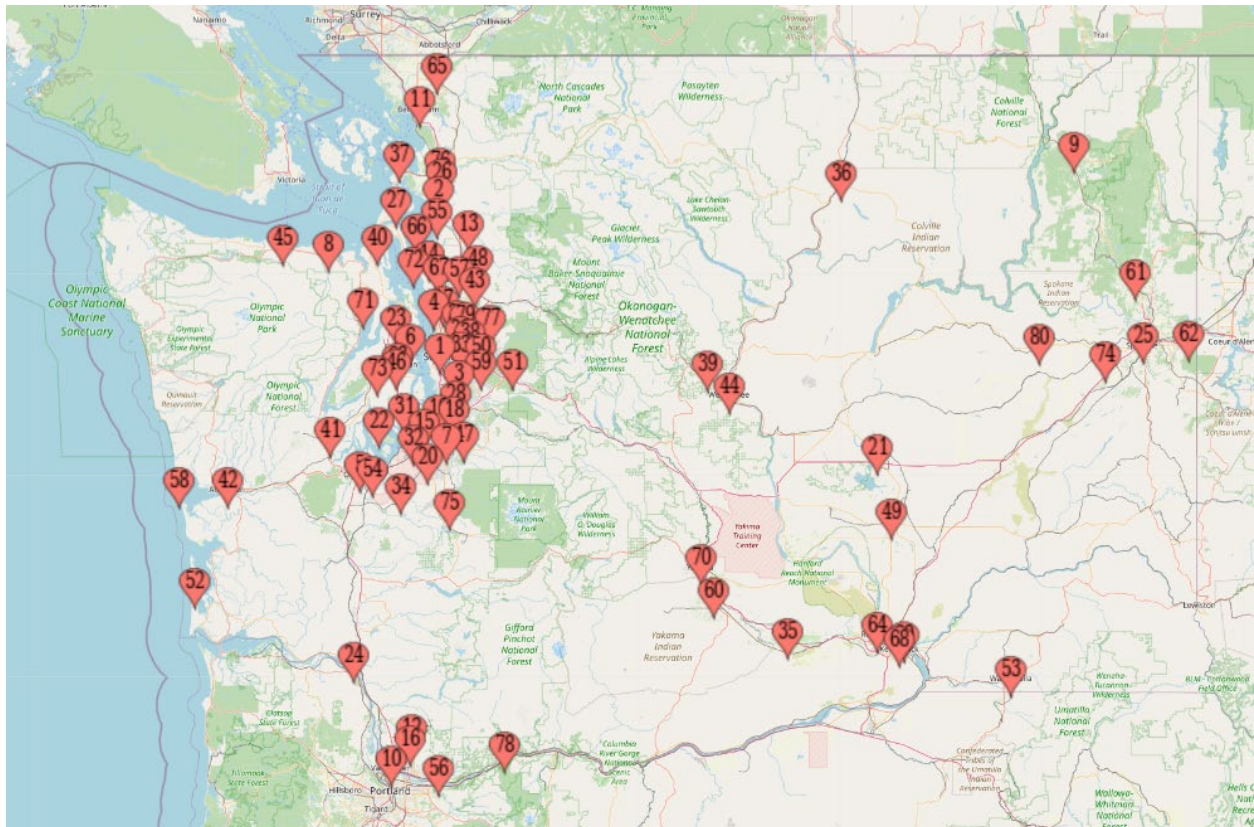
Responses to the 2021 survey came from six countries including the United States. While 98.0% of responses were from the United States, 2.0% came from other countries.

- Canada (4)
- Mexico (2)
- Thailand (1)
- Bermuda (1)
- Belarus (1)

Responses from the United States represented 18 states. The top three states are:

- Washington (84.7%)
- Oregon (5.6%)
- California (2.8%)

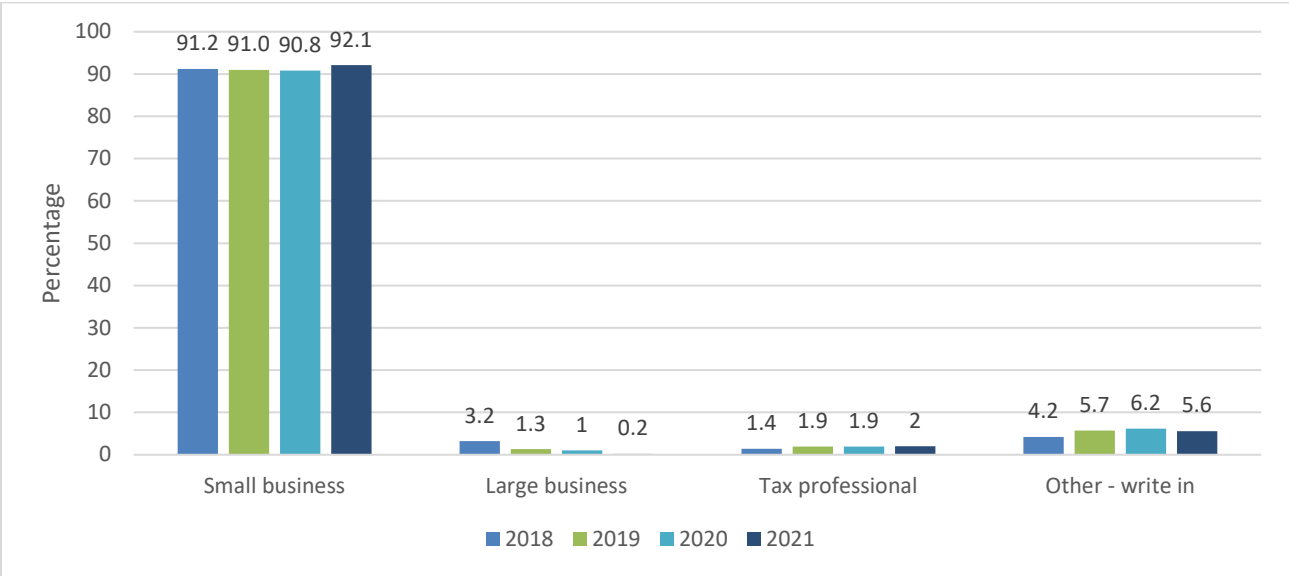
In Washington, responses came from 80 locations throughout the state.



RESULTS

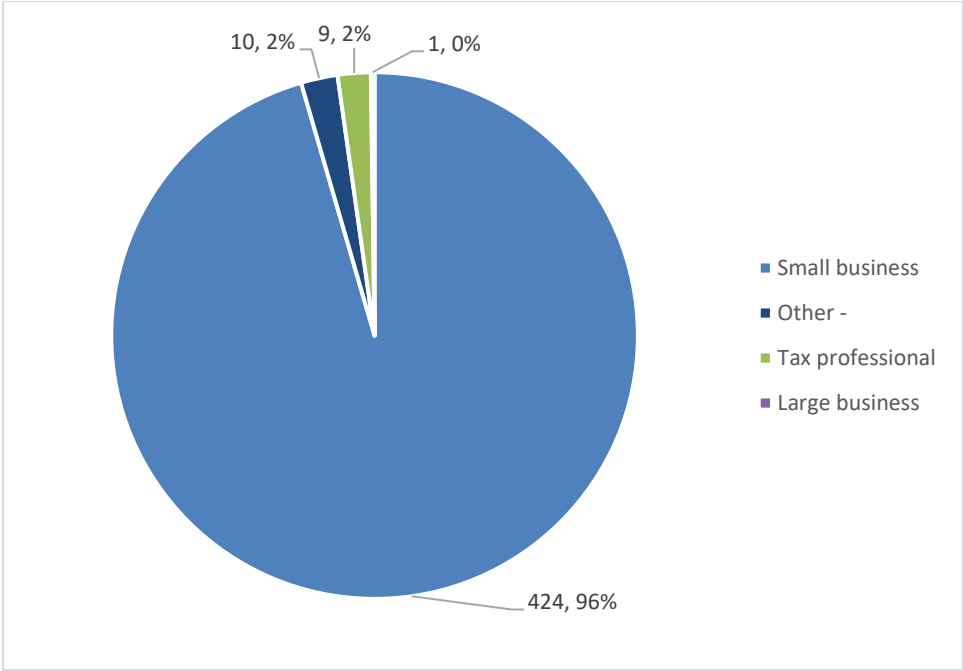
Q1. How would you describe yourself or your business?

	2018	2019	2020	2021
Small Business	91.2%	91.0%	90.8%	92.1%
Large Business	3.2%	1.3%	1.0%	0.2%
Tax Professional	1.4%	1.9%	1.9%	2.0%
Other	4.2%	5.7%	6.2%	5.6%



- The percentage of respondents who described themselves as a **small business** increased slightly by 1.3 percentage points.
- The percentage of respondents who described themselves as a **large business** stayed about the same at 0.2%. This is the smallest percentage of respondents that have classified themselves as a large business in the last four years of the survey.
- The **tax professional** percentage had almost no change in the last 3 years.
- There was a slight decrease in the number of respondents who described themselves as 'Other' from the previous year. The write-in explanations from respondents who selected 'Other' were categorized into the following:
 - Micro-business, self-employed or hobbyist.
 - Retired.
 - Non-profit organization or government.
 - Bookkeeper.

If the micro-business, self-employed or hobbyist respondent group is reclassified as small business, the 2021 respondent break down is:



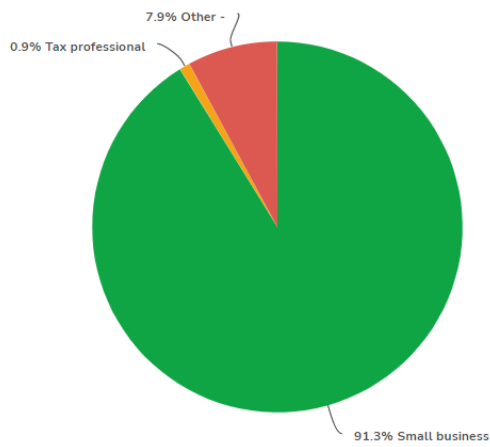
With this reclassification, 96% of respondents are described as a small business.

This reclassification is *not* used in any of the following results. All group descriptions are unmodified and exactly as the respondent indicated in the survey feedback.

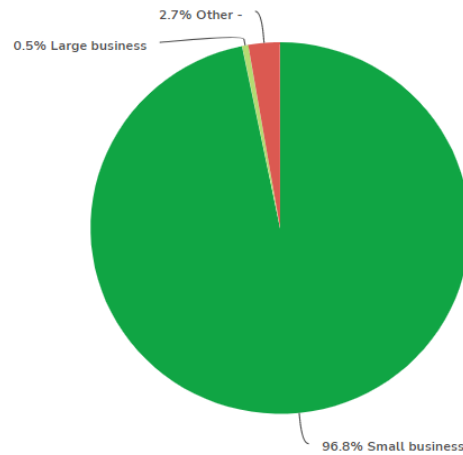
2021: "How would you describe yourself or your business by cohort."

Group 1: One business tax account

- Respondents with one business tax account and income under the median classified themselves as 91.3% small business or 7.9% other.
- Respondents with one business and income over the median classified themselves as 96.8% (+5.5 percentage point) small business and 2.7% (-5.2 percentage points) other.
- Regardless of median income, most respondents with one business describe themselves as a small business.



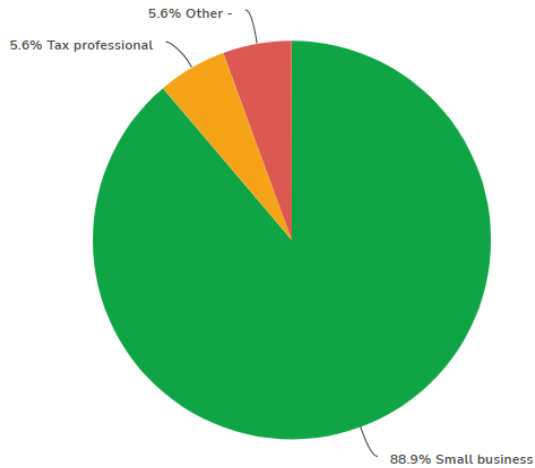
Group 1 Small: Income less than or equal to median



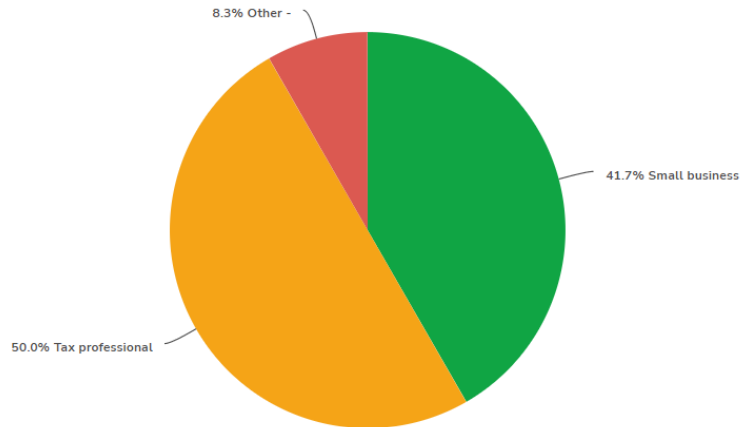
Group 1 Large: Income more than the median

Group 2: Two or more business tax accounts

- 88.9% of respondents with two or more businesses and income less than or equal to the median classified themselves as small business and 5.6% tax professionals.
- 50.0% of respondents with two or more businesses and income over the median classified themselves as tax professionals.



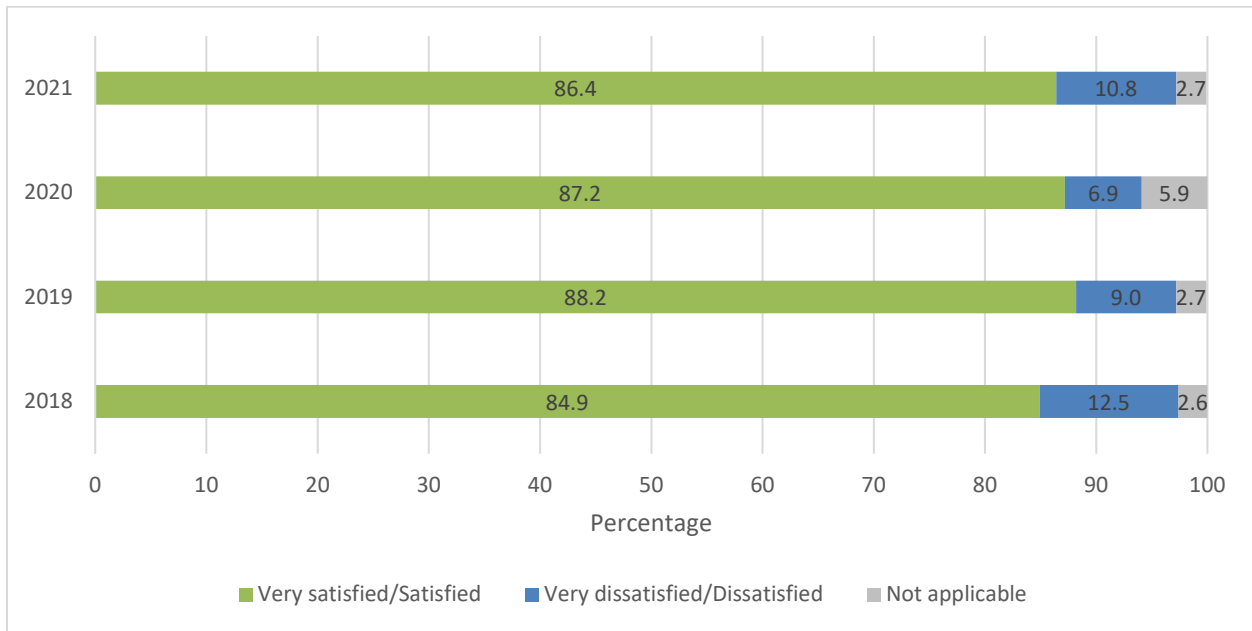
Group 2 Small: Income less than or equal to median



Group 2 Large: Income more than the median

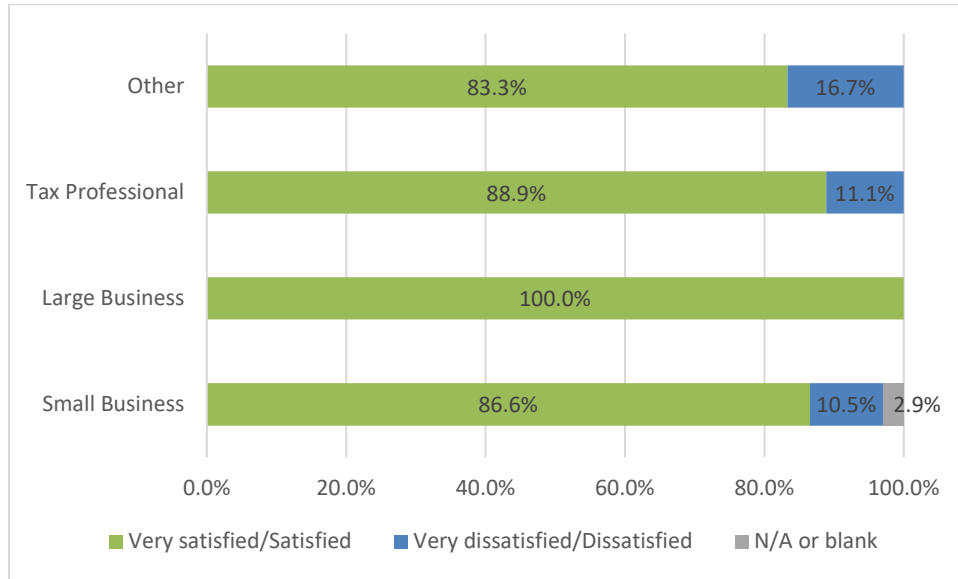
Q2. How satisfied were you after your last experience with us?

	2018	2019	2020	2021
Very satisfied	33.4%	34.9%	30.0%	38.8%
Satisfied	51.5%	53.3%	57.2%	47.6%
Dissatisfied	9.0%	4.8%	4.6%	5.4%
Very dissatisfied	3.5%	4.2%	2.3%	5.4%
Not applicable	2.6%	2.7%	5.9%	2.7%



- Overall satisfaction stayed about the same, at 86.4% very satisfied/satisfied in 2021.
- Overall dissatisfaction increased by 3.9 percentage points from 6.9% in 2020 to 10.8% in 2021. This is the highest level of dissatisfaction in this category since 2018.
- Not applicable decreased by 3.2 percentage points from 5.9% in 2020 to 2.7% in 2021.

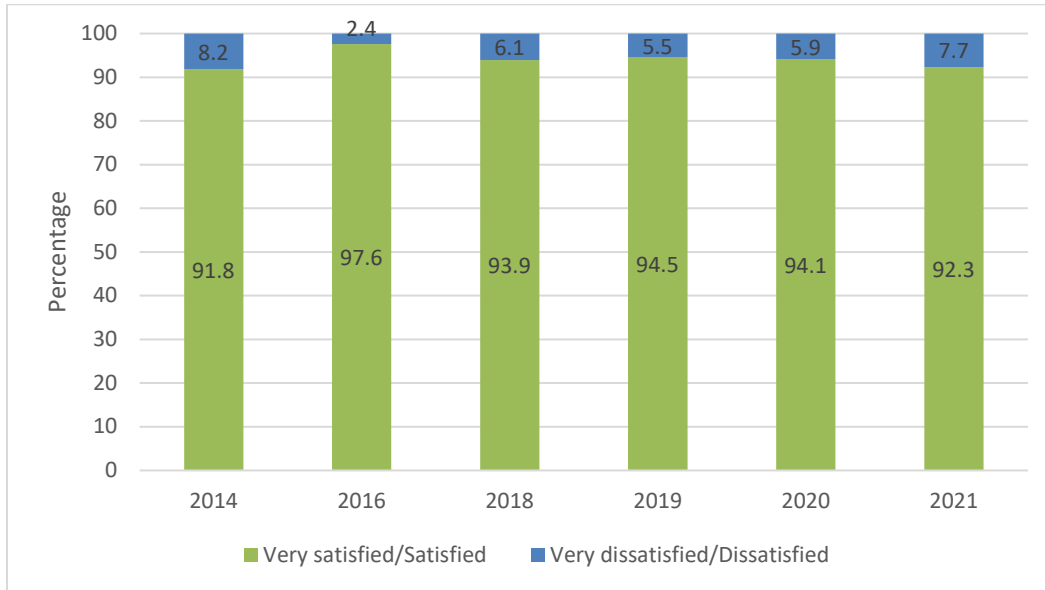
2021: Overall satisfaction after the respondent's last experience with DOR by description



- 88.9% (8) of respondents who described themselves as a **tax professional** were very satisfied/satisfied with 11.1% (1) tax professionals indicating that they were dissatisfied.
- 100.0% (1) of respondents who described themselves as a **large business** were very satisfied/satisfied.
- 86.6% (354) of respondents who described themselves as **small business** were very satisfied/satisfied. 10.5% (43) of respondents were very dissatisfied/dissatisfied and 2.9% (12) selected not applicable.
- 83.3% (20) of respondents describing themselves as **other** were very satisfied/satisfied. 16.7% (4) of respondents were very dissatisfied/dissatisfied.

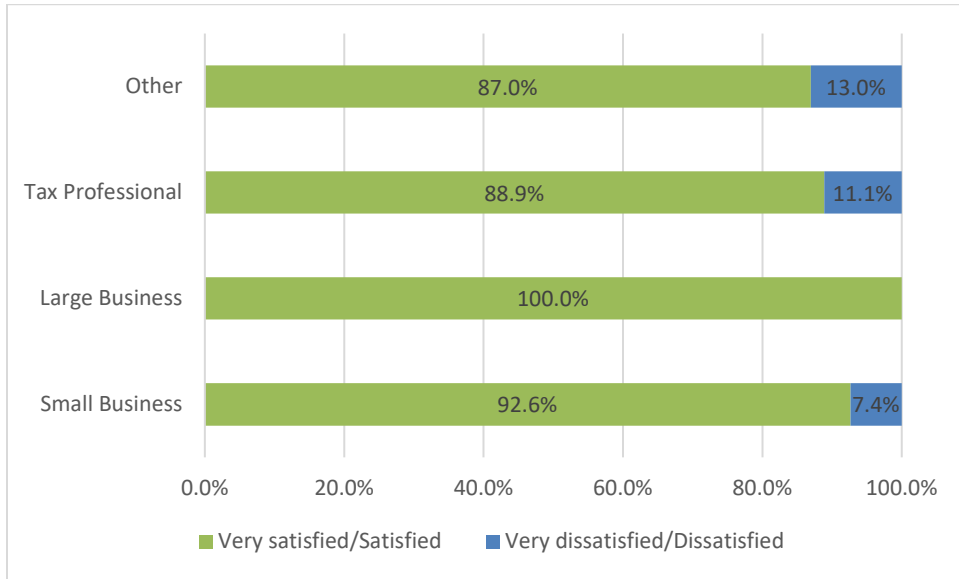
Q3. How satisfied are you with the overall quality of service you receive from the Department of Revenue?

	2014	2016	2018	2019	2020	2021
Very satisfied	57.7%	43.9%	36.5%	39.7%	32.3%	38.1%
Satisfied	34.1%	53.7%	57.4%	54.8%	61.8%	54.2%
Dissatisfied	4.9%	1%	4.7%	3.8%	4.3%	5.0%
Very dissatisfied	3.3%	1.4%	1.4%	1.7%	1.6%	2.7%



- Overall satisfaction decreased slightly by 1.8 percentage points from 94.1% in 2020 to 92.3% very satisfied/satisfied in 2021.
- Overall dissatisfaction increased slightly by 1.8 percentage points from 5.9% in 2020 to 7.7% in 2021. This is the highest level of overall dissatisfaction we have seen in this category since 2014.

2021: Overall satisfaction with DOR's overall quality of service by description



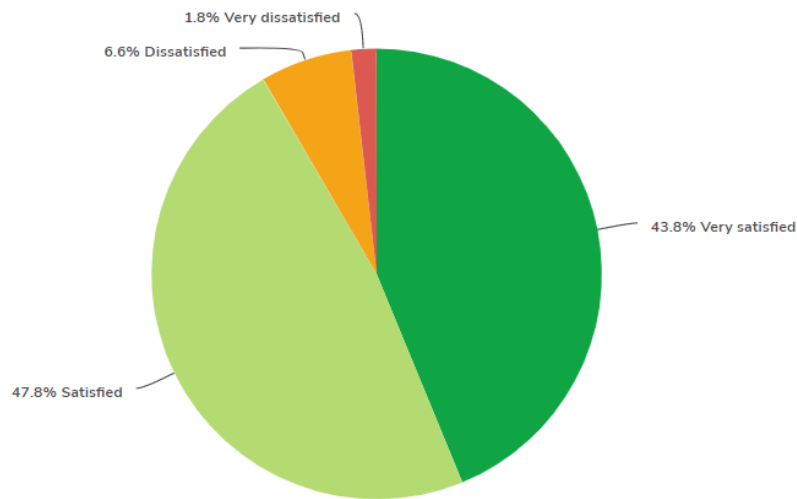
- 88.9% (8) of respondents who described themselves as a **tax professional** were very satisfied/satisfied with 11.1% (1) tax professionals indicating that they were dissatisfied.
- 100.0% (1) of respondents who described themselves as a **large business** were very satisfied/satisfied.
- 94.6% (378) of respondents who described themselves as **small business** were very satisfied/satisfied. 7.4% (30) of respondents were very dissatisfied/dissatisfied.
- 87.0% (20) of respondents who described themselves as **other** were very satisfied/satisfied. 13% (3) of respondents were very dissatisfied/dissatisfied.

2021: Overall satisfaction with DOR's quality of service by cohort

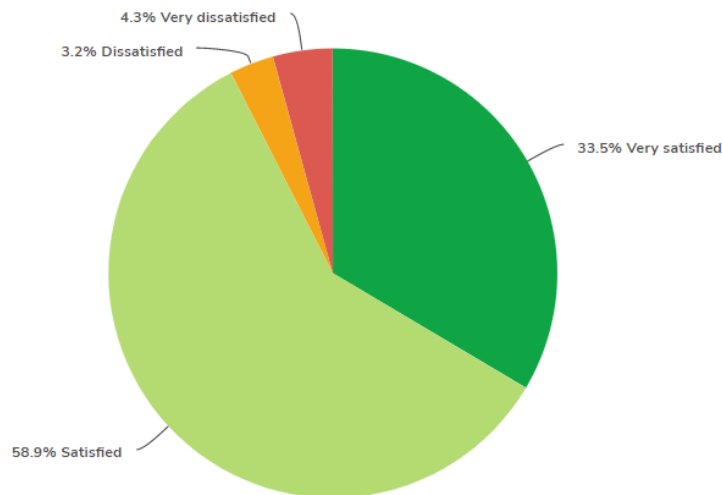
Group 1: One business tax account

- 91.6% of respondents with one business and income lower than median were satisfied or very satisfied.
- 92.4% of respondents with one business and income higher than the median were satisfied or very satisfied.
- Overall satisfaction did not vary by income for respondents with one business.

Group 1 Small: Less than or equal to median income



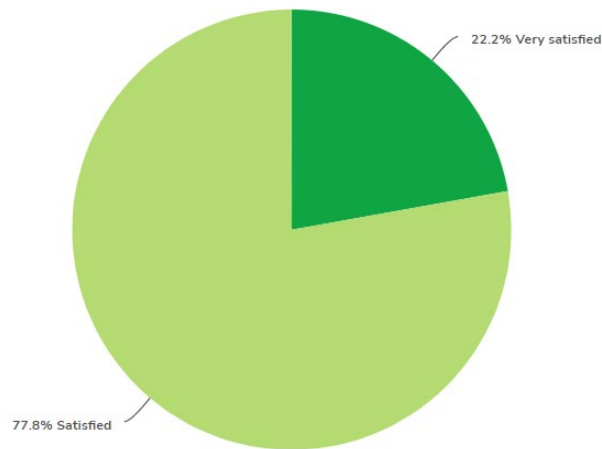
Group 1 Large: More than median income



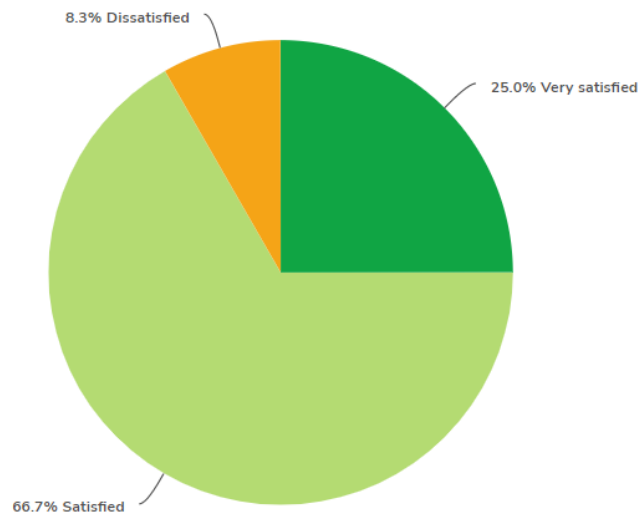
Group 2: Two or more business tax accounts

- 100% of 18 respondents with two or more businesses and income lower than median were satisfied or very satisfied.
- 91.7% of 12 respondents with two or more businesses and income higher than the median were satisfied or very satisfied. 8.3% (1 respondent) was dissatisfied.
- Overall satisfaction did not vary by income for respondents with two or more businesses.

Group 2 Small: Less than or equal to median income

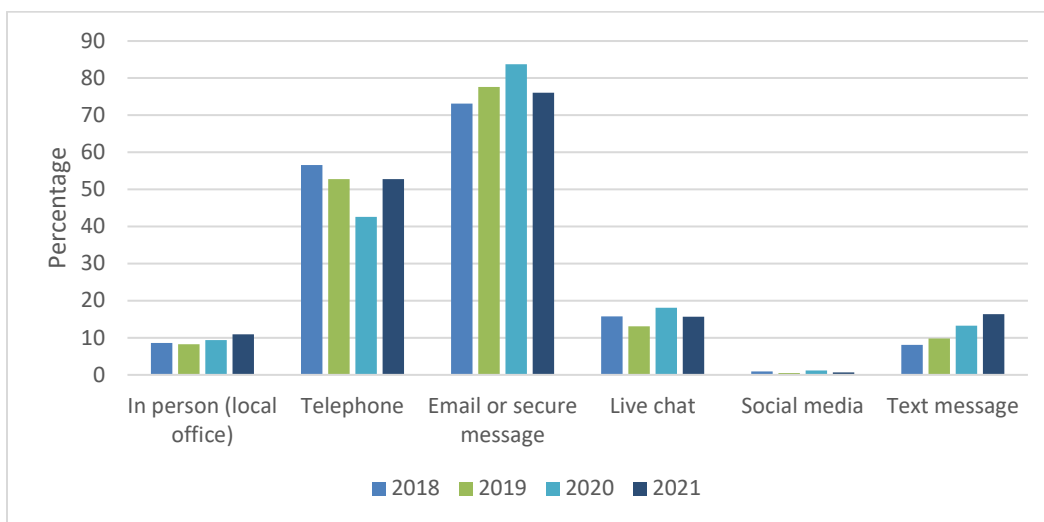


Group 2 Large: More than median income



Q4. How do you prefer to interact with the Department of Revenue? (choose all that apply)

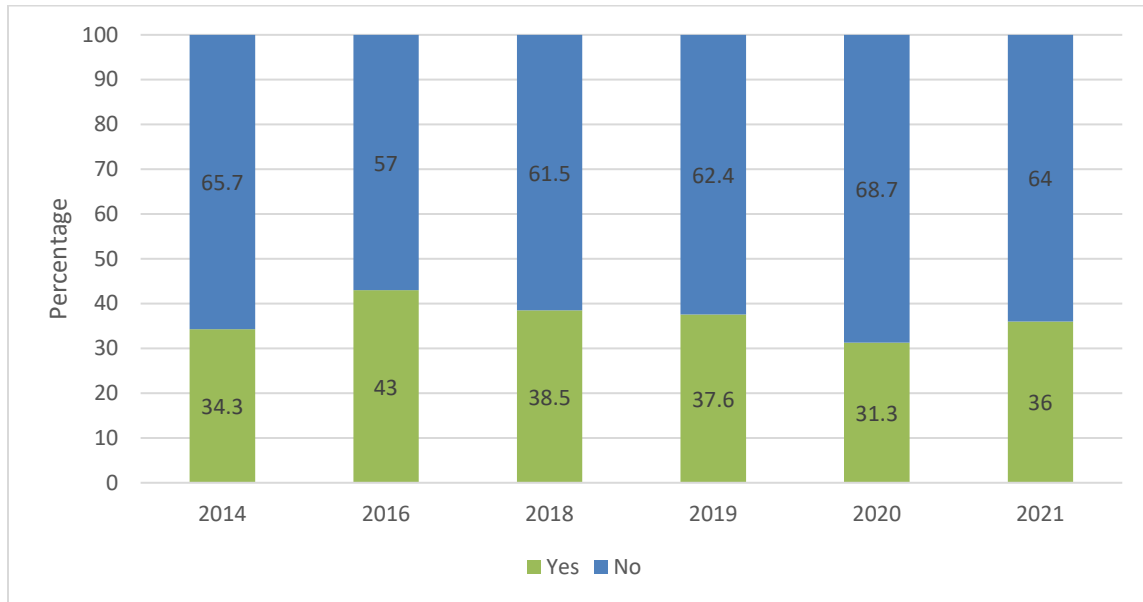
	2018	2019	2020	2021
In person	8.6%	8.3%	9.4%	10.9%
Telephone	56.6%	52.8%	42.6%	52.8%
Email or secure message	73.1%	77.6%	83.7%	76.1%
Live chat	15.8%	13.1%	18.1%	15.7%
Social media	0.9%	0.5%	1.2%	0.7%
Text message	8.1%	9.8%	13.3%	16.4%



- Telephone increased by 10.2 percentage points in 2021. Telephone remains the second most preferred way to interact with the Department of Revenue since 2018. This is the first time since 2018 that we have seen an increase in telephone being a preferred method of communication. This is likely due to the closures of the DOR front counters for the entirety of 2021.
- Email or secure message decreased by 7.6 percentage points in 2021. From 2018 to 2020, it increased by 10.6 percentage points. This year is the first time we have seen a decrease in this category. Majority of respondents prefer to use email or secure message to interact with the Department of Revenue.
- Live chat decreased slightly by 2.4 percentage points from 2020 to 2021.
- Text message increased 8.3 percentage points since 2018. From 2020 to 2021, it increased by 3.1 percentage points. This preferred method of communication continues to grow steadily each year.
- In person increased slightly since 2020 by 1.5 percentage points.
- Social media continues to be the least preferred method to interact with the Department of Revenue.

Q5. Did you contact our call center during the last year?

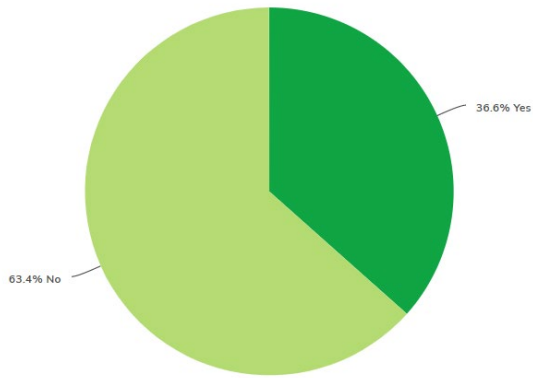
	2014	2016	2018	2019	2020	2021
Yes	34.3%	43.0%	38.5%	37.6%	31.3%	36.0%
No	65.7%	57.0%	61.5%	62.4%	68.7%	64.0%



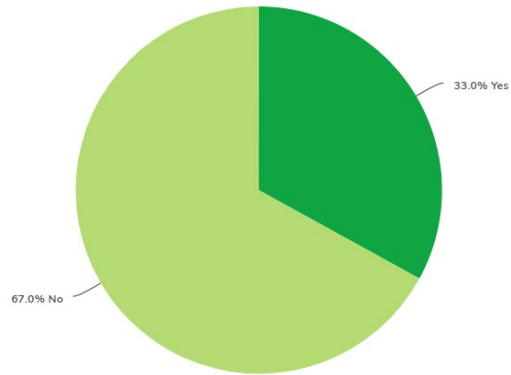
In 2021, percentage of customers who had contacted the call center increased by 4.7 percentage points. This is the first time we have seen an increase since 2016. DOR front counters were closed for all of 2021. The need to contact DOR by phone was driven by the negative impact of the pandemic.

2021: "Did you contact the cell center?" by cohort

Group 1: One business tax account



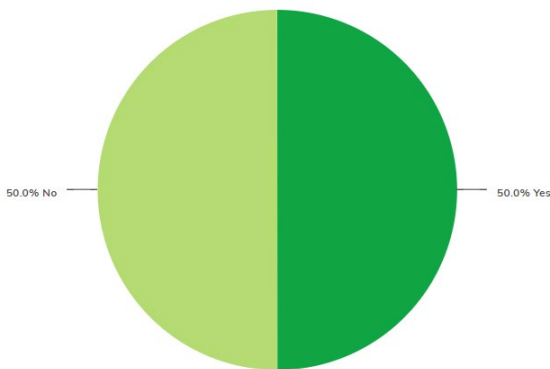
Group 1 Small: Income less than or equal to median



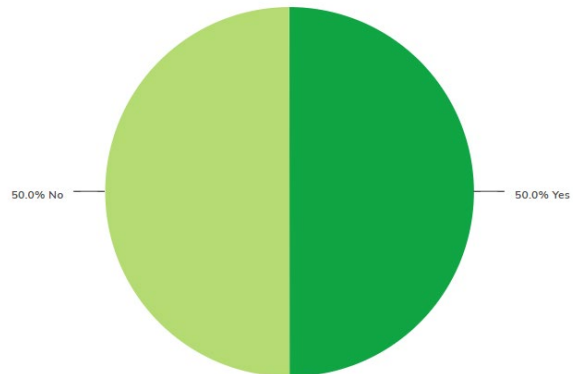
Group 1 Large: Income more than median

- 36.6% of respondents with income less than or equal to the median contacted the call center.
- 33.0% of respondents with income more than the median contacted the call center. This is 3.6 percentage points less than respondents with income less than or equal to the median.

Group 2: Two or more business tax accounts



Group 2 Small: Income less than or equal to median

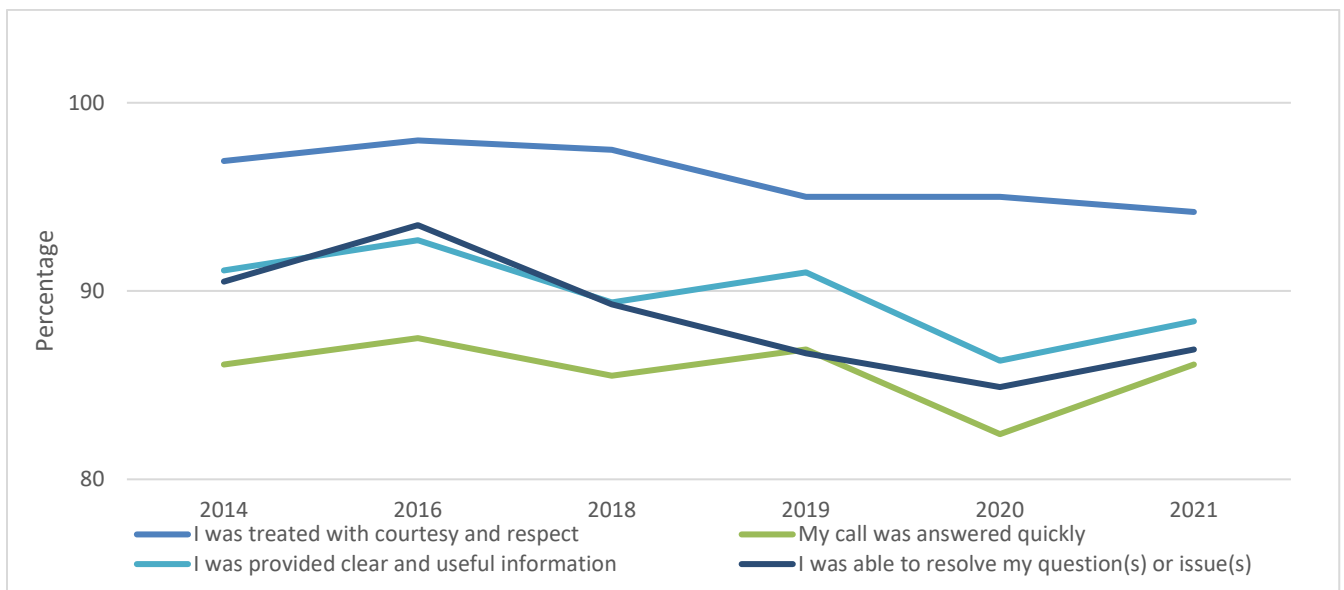


Group 2 Large: Income more than median

- 50% of respondents across both income groups contacted the call center. In 2021, DOR implemented multi-factor authentication (additional online security measure) and targeted communication campaigns to accountants and taxpayers with two or more businesses. It is likely, that the MFA implementation contributed to the higher rate of contact to the call center for taxpayers with two or more businesses.

Q6. Please tell us about your experience with our call center.

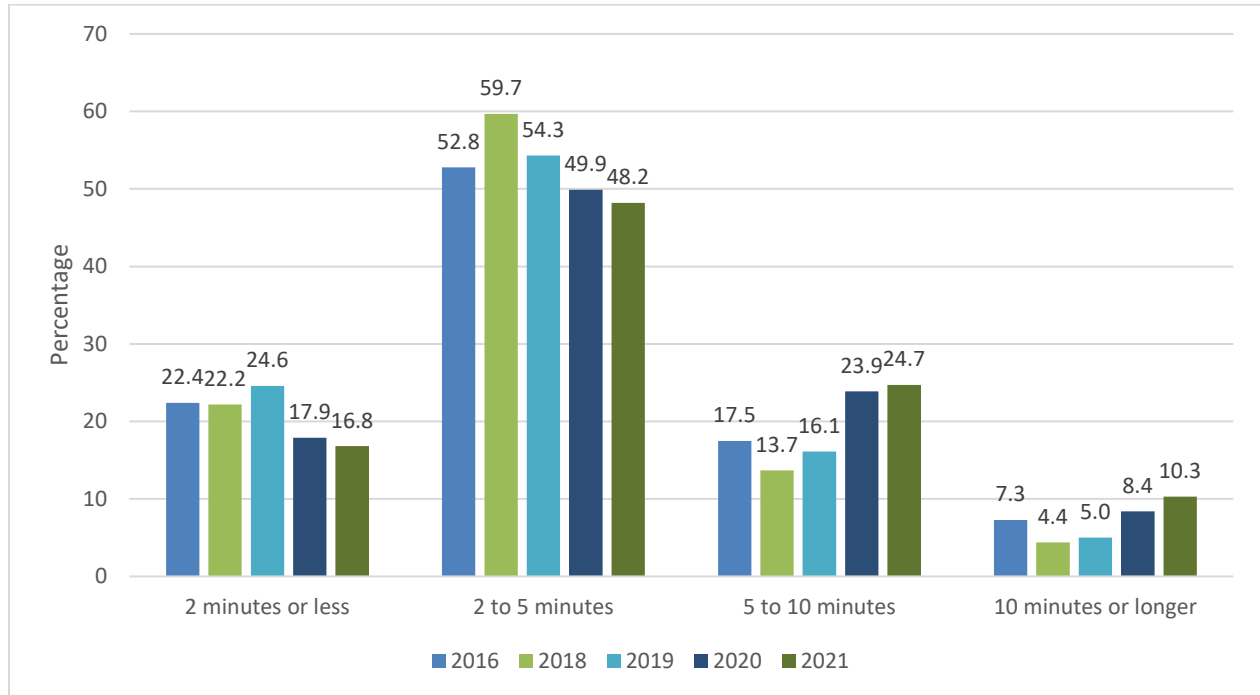
	2014	2016	2018	2019	2020	2021
A. I was treated with courtesy and respect						
Strongly agree	80.8%	57.7%	60.9%	55.2%	54.1%	59.1%
Agree	16.1%	40.3%	36.6%	39.8%	40.9%	35.1%
Disagree	2.4%	1.2%	1.9%	3.7%	2.9%	1.9%
Strongly disagree	0.7%	0.8%	0.6%	1.2%	2.1%	3.9%
B. My call was answered quickly						
Strongly agree	55.1%	23.1%	37.7%	38.1%	34%	38.6%
Agree	31.0%	64.4%	47.8%	48.8%	48.4%	47.5%
Disagree	9.5%	10.5%	9.3%	11.9%	12.3%	7.6%
Strongly disagree	4.4%	2.0%	5.6%	1.2%	5.3%	6.3%
C. I was provided clear and useful information						
Strongly agree	67.4%	51.6%	50.6%	49.8%	45.2%	51%
Agree	23.7%	41.1%	38.8%	41.2%	41.1%	37.4%
Disagree	7.9%	6.0%	8.1%	5.3%	9.5%	5.2%
Strongly disagree	1.0%	1.2%	2.5%	3.7%	4.1%	6.5%
D. I was able to resolve my question(s) or issue(s)						
Strongly agree	70.6%	49.4%	50.9%	49.6%	46.2%	50.7%
Agree	19.9%	44.1%	38.4%	37.1%	38.7%	36.2%
Disagree	6.6%	5.3%	5.7%	9.2%	8.8%	5.3%
Strongly disagree	3.0%	1.2%	5.0%	4.2%	6.3%	7.9%



- ***I was treated with courtesy and respect*** strongly agree/agree responses stayed relatively steady at 94.2%.
- ***My call was answered quickly*** strongly agree/agree responses increased by 3.7 percentage points since 2020.
- ***I was provided clear and useful information*** strongly agree/agree responses increased by 2.1 percentage points since 2020 but is 4.3 percentage points lower than the highest percentage in 2016.
- ***I was able to resolve my questions(s) or issue(s)*** strongly agree/agree responses increased by 2.0 percentage points since 2020 but is 6.6 percentage points lower than the highest percentage in 2016.
- Overall, there was positive increases in almost every category.

Q7. How long are you willing to wait on hold to speak to a customer service representative?

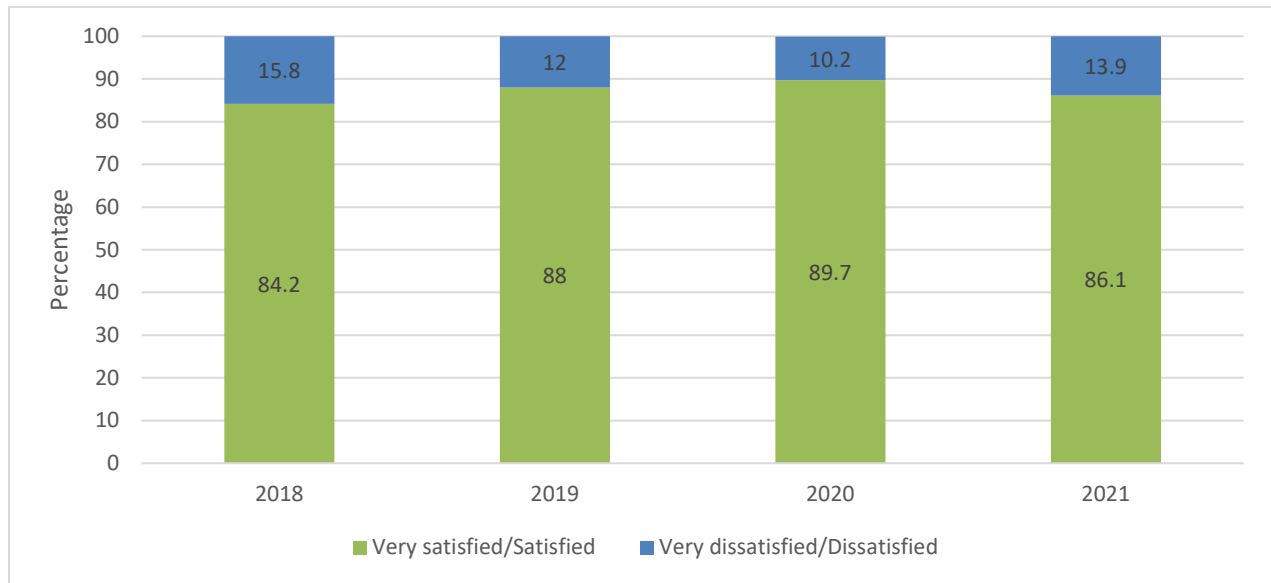
	2016	2018	2019	2020	2021
Less than 2 minutes	22.4%	22.2%	24.6%	17.9%	16.8%
2 to 5 minutes	52.8%	59.7%	54.3%	49.9%	48.2%
5 to 10 minutes	17.5%	13.7%	16.1%	23.9%	24.7%
10 minutes or longer	7.3%	4.4%	5.0%	8.4%	10.3%



In 2021, some respondents were more willing to wait on hold longer to speak to a customer service representative. Waiting 5 to 10 minutes and 10 minutes or longer combined increased by 2.7 percentage points. These categories have continued to see steady increases since 2018.

Q8. How satisfied are you with our website and My DOR (online filing and payment system)?

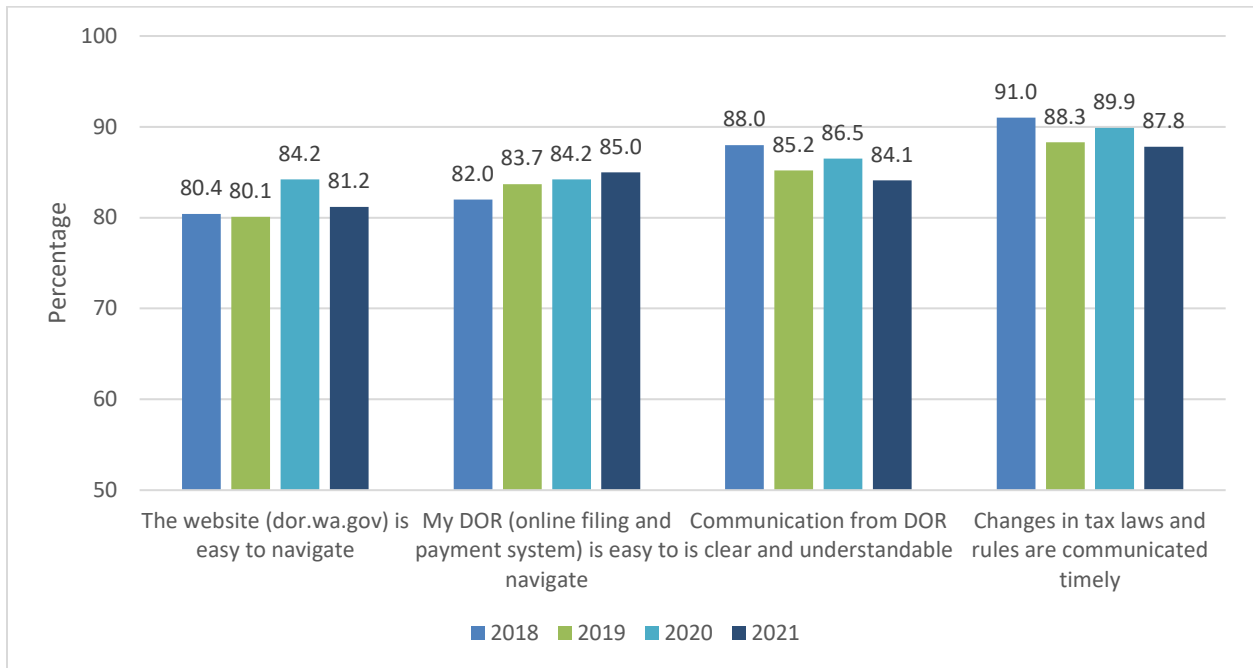
	2018	2019	2020	2021
Very satisfied	33.6%	32.1%	31.9%	40.0%
Satisfied	50.6%	55.9%	57.8%	46.1%
Dissatisfied	10.7%	8.8%	7.8%	8.4%
Very dissatisfied	5.1%	3.2%	2.4%	5.5%



In 2021, very satisfied/satisfied responses decreased by 3.6 percentage points from 2020.

Q9. How much do you agree with each of these statements about the Department of Revenue and its services?

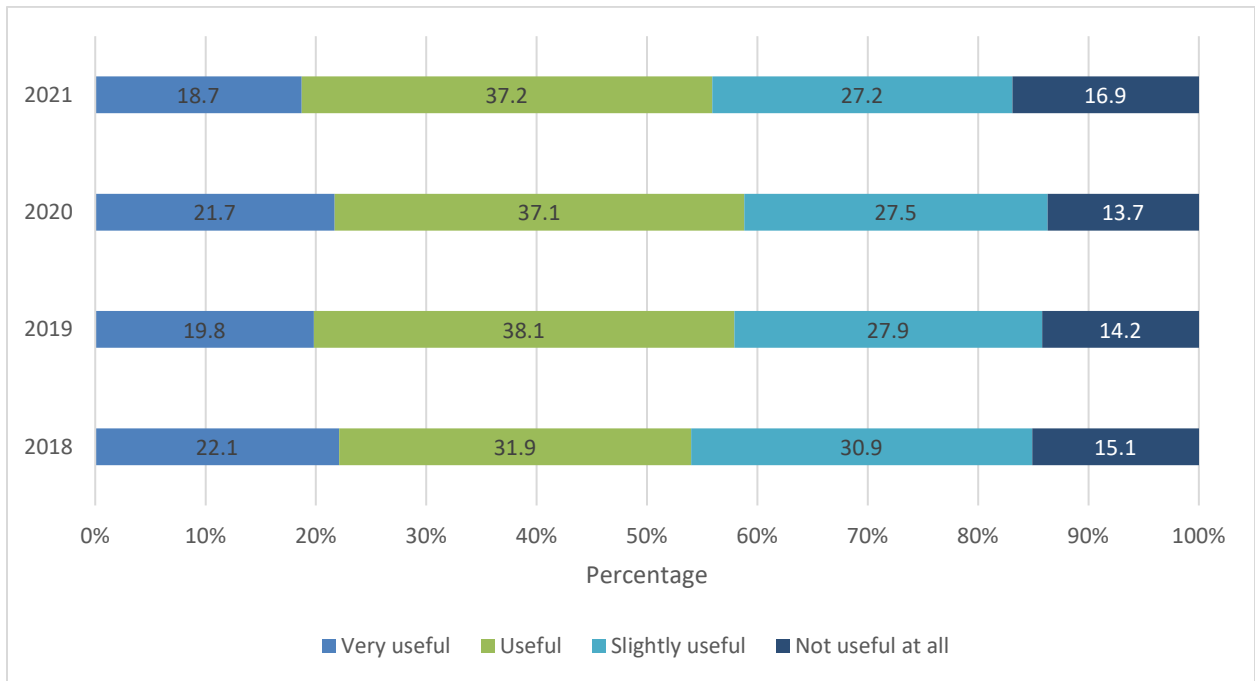
	2018	2019	2020	2021
A. The website (dor.wa.gov) is easy to navigate				
Strongly agree	20.1%	22.2%	19.2%	28.2%
Agree	60.3%	57.9%	65.0%	53.0%
Disagree	13.4%	16.3%	13.0%	14.2%
Strongly disagree	6.2%	3.5%	2.8%	4.5%
B. My DOR (online filing and payment system) is easy to navigate				
Strongly agree	24.2%	28.8%	23.7%	35.7%
Agree	57.8%	54.9%	60.5%	49.3%
Disagree	12.6%	13.0%	12.9%	10.0%
Strongly disagree	5.4%	3.4%	2.9%	5.0%
C. Communication from DOR is clear and understandable				
Strongly agree	20.9%	24.0%	22.3%	27.5%
Agree	67.1%	61.2%	64.2%	56.6%
Disagree	9.9%	12.1%	11.7%	12.0%
Strongly disagree	2.1%	2.8%	1.8%	3.9%
D. Changes in tax laws and rules are communicated timely				
Strongly agree	24.8%	25.8%	20.9%	23.8%
Agree	66.2%	62.5%	69.0%	64.0%
Disagree	7.6%	8.4%	8.4%	7.9%
Strongly disagree	1.4%	3.4%	1.7%	4.4%



- **The website (dor.wa.gov) is easy to navigate** strongly agree/agree responses decreased by 3 percentage points since 2020.
- **My DOR (online filing and payment system) is easy to navigate** strongly agree/agree responses stayed about the same in 2021. 2021 had the highest percentage of agreement for this statement since 2018 (when the system went live).
- **Communication from DOR is clear and understandable** strongly agree/agree responses decreased 2.4 percentage points since 2020.
- **Changes in tax laws and rules are communicated timely** strongly agree/agree responses decreased by 2.1 percentage points since 2020.

Q10. How useful would it be to participate in online training (webinar) that teaches you about taxes?

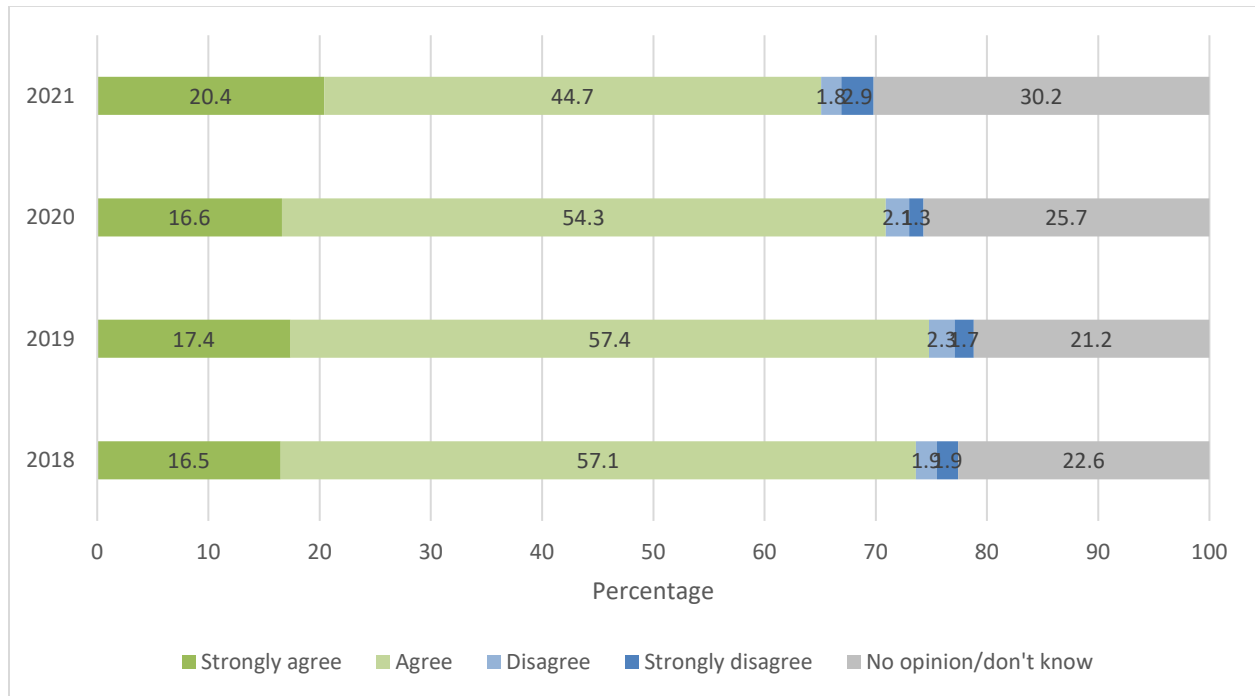
	2018	2019	2020	2021
Very useful	22.1%	19.8%	21.7%	18.7%
Useful	31.9%	38.1%	37.1%	37.2%
Slightly useful	30.9%	27.9%	27.5%	27.2%
Not useful at all	15.1%	14.2%	13.7%	16.9%



In 2021, overall perception of the usefulness of online training about taxes decreased slightly by 3.2 percentage points.

Q11. The State of Washington has a Taxpayer Bill of Rights (Revised Code of Washington 82.32A.020). Click here to view taxpayer rights. To what extent do you agree that we respect your rights as a taxpayer?

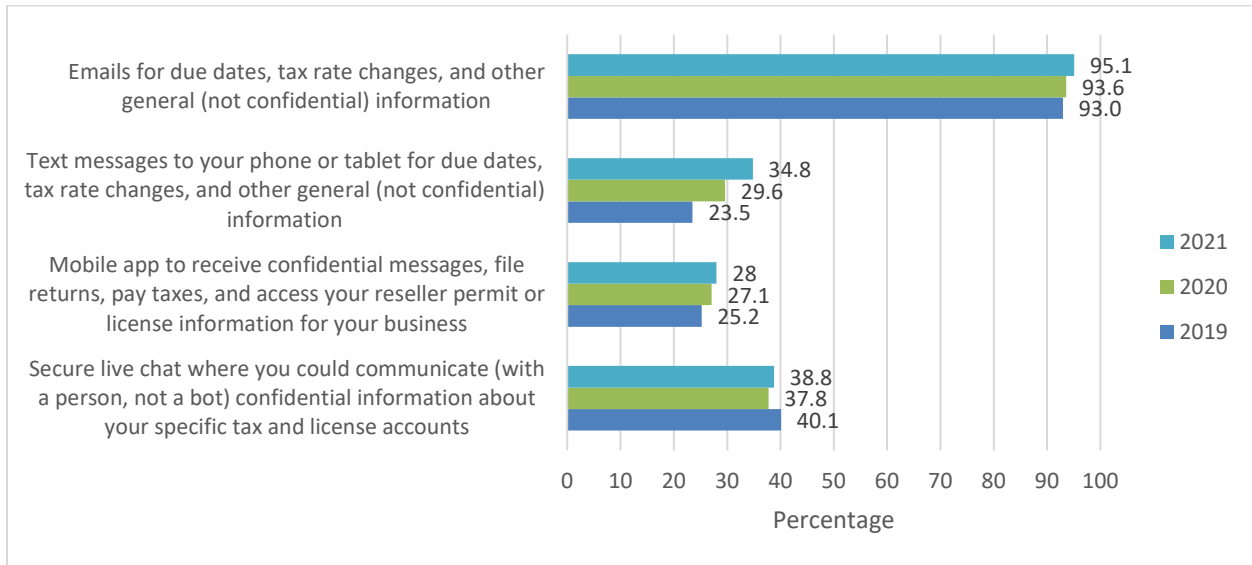
	2018	2019	2020	2021
Strongly agree	16.5%	17.4%	16.6%	20.4%
Agree	57.1%	57.4%	54.3%	44.7%
Disagree	1.9%	2.3%	2.1%	1.8%
Strongly disagree	1.9%	1.7%	1.3%	2.9%
No opinion/don't know	22.6%	21.2%	25.7%	30.2%



- Strongly agree/agree decreased by 5.8 percentage points from 2020.
- Disagree/strongly disagree slightly increased by 1.3 percentage points from 2020.
- No opinion/don't know responses increased by 4.5 percentage points from 2020. This category has seen a 9.0 percentage point increase since 2019.

Q12. We continue to evaluate ways to better serve you. However, we cannot send confidential information (such as balance due amounts) through unsecured channels. If we offered the following, would you use them (check all that apply)?

	2019	2020	2021
A. Emails for due dates, tax rate changes, and other general (not confidential) information	93.0%	93.6%	95.1%
B. Text messages to your phone or tablet for due dates, tax rate changes, and other general (not confidential) information	23.5%	29.6%	34.8%
C. Mobile app to receive confidential messages, file returns, pay taxes, and access your reseller permit or license information for your business	25.2%	27.1%	28.0%
D. Secure live chat where you could communicate (with a person, not a bot) confidential information about your specific tax and license accounts	40.1%	37.8%	38.8%



- All offerings saw increases in 2021.
- Text messages increased the most with a 5.2 percentage points from 2020, with a 11.3 percentage point increase since 2019.
- Both emails and the mobile app slightly increases from 2020.
- Secure live chat increased 1.0 percentage point over 2020.

Q13. Please tell us how we can improve our service to you.

	Responses	Percent
Answered	187	42.1%
Skipped	257	57.9%
Total	444	100.0%

Top themes and comment sampling

- 50 responses indicated that our services work well and we should continue “doing what we are doing”.

I am just a small business and the service that I use from you is great.

There doesn't need to be any changes. I can do my taxes easily on here and it has helped me learn how to do my taxes.

- 33 responses were related to My DOR.

The website is really hard to use to pay annual taxes. I always need to refer to my previous year return to see what the pages look like. there is not enough help text on the pages and the screens do not flow smoothly between sections.

I'm not really happy with this "additional" step to sign in to my SAW account. Having to have an additional step, sending a code before logging in is a pain!

- 19 responses were related to help or training.

The annual tax form should have interactive help associated with it.

Consider design improvements for filing the annual taxes. Could be more like turbotax where you fill out one simple question at a time and get suggestions for help.

Videos on using selections would be good.

Q14. Please tell us what we are doing well.

	Responses	Percent
Answered	185	41.7%
Skipped	259	58.3%
Total	786	100.0%

- 78 responses referenced My DOR and the website.

Website is easy to use and understand for tax filing.

The website is continually improving, even though it was adequate in the beginning.

Nice to get an email when I need to file annual report. Very easy to file annual report online.

- 50 responses referenced the quality of our customer service.

Every time I have needed help with paperwork, the person answering the phone was kind, patient and courteous. Such a big help!

Customer service reps were great! got behind with all the craziness this past year and when I talked with representatives they were more than helpful and patient. I was having a rough time and really wasn't expecting them to be so nice considering I was delinquent at the time.

When I had a difficulty in filing for the first time, after the death of my husband in 2020, the DOR staff was extremely helpful ! They willingly went out of their way to help me. Many thanks for the one-to-one.

- 30 responses referenced communications.

Easy reminders to file taxes.

Email notice alerted me I needed to do my annual filing.

I always receive tax change updates in ample time to prepare. Tax rates are easy to look up and documents are pretty easy to find.

Q15. What is the one thing we should never stop doing?

	Responses	Percent
Answered	166	37.4%
Skipped	278	62.6%
Total	444	100.0%

- 53 responses cited providing excellent customer service with live person.

Great customer service answering the phone with a real person within five minutes.

Everyone at WA DOR with whom I have spoken on the phone over the years has been knowledgeable and patient. It is very much appreciated.

Have a live person to help me with questions and problems.

- 36 responses referenced communication.

Communicating with the public.

Sending email reminders of the date when taxes are due.

Keep making it simpler. Keep using common language instead of legaleze.

- 22 comments referenced offering and improving our online services.

Keep improving the website. It's great, but please keep thinking about how folks use it and make it even better.

Never stop making improvements to the website! It seems that you improved the log in experience a while ago, because I remember that I used to have more trouble with that and needed to reset password.

Having on-line access to accounts and communication through DOR website