

2020

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" in order 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 2020 Taxpayer Satisfaction 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 (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 impact and stresses of the COVID-19 pandemic on taxpayers has been reflected in many of the responses. Because of this impact, we are providing additional insights into the 2020 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, 94.1% responded that they were "very satisfied" or "satisfied." When asked about their satisfaction level with their last interaction, we saw an 87.2% positive response.

We found taxpayers continue to prefer using email/secure messaging or telephone to interact with Revenue (83.7%).

When asked if taxpayers had contacted the call center in the past year, the 2020 survey saw a decrease in the percentage responding yes. In 2020, it dropped to 31.3%. We have seen a decrease in responses to this question each year, since 2016.

Last year, question 12 was updated to help us evaluate our communication methods. The question asked customers to choose all options they would use, whether it is something we currently offer (email communication) or a method we could offer in the future (secure live chat or text messages). This helps us gauge if we are hitting the mark now and identify the communication channels we should be focusing on developing in the future.

OPPORTUNITIES FOR IMPROVEMENT

<i>What we heard...</i>	<i>What we will do about it...</i>
Frustration with not knowing what government agency offers which services.	We will update our website search terms and information to direct customers to appropriate resources.
The need for more education and assistance in filing taxes.	We will add new and small business web content that includes what the Department of Revenue does, our education options, and additional resources. We will continue to develop videos, workshops, and web content on topics requested by small businesses.
Frustration with logging in and accessing online services in My DOR.	Make improvements to the My DOR log in screen for ease of use and add user assistance links. Update messages in My DOR to be more descriptive when a user does not have the right permissions to access tax and licensing information.
Frustration that closed businesses continue to receive communications.	We will add a link to unsubscribe from Revenue's notification system on the "close a business" webpage, online confirmation page and business information change form. Implement an automated process that would evaluate whether a business is closed before communication is sent. Create a business exit letter with next steps and confirmation of closure.
We need to continue to make improvements to our online services.	We will continue to perform usability testing on our online channels, including filing a return in My DOR.
Confusion about which taxes and classifications apply to businesses and a desire to simplify filing taxes.	Evaluate whether we can create a tax classification quiz or wizard to help inform taxpayers.

SURVEY PROFILE

Method

The survey was sent to a random sample of Washington taxpayers. Out of 450,000 active taxpayers, 10,000 were selected to participate in the survey.

The selected taxpayers received an email with a link to the survey. We received 786 survey responses for a response rate of 7.9%, an increase of 1.2% from 2019 (6.7%).

Timeframe

Revenue conducted the survey between Dec. 15, 2020 and Jan. 25, 2021.

Where did our responses come from?

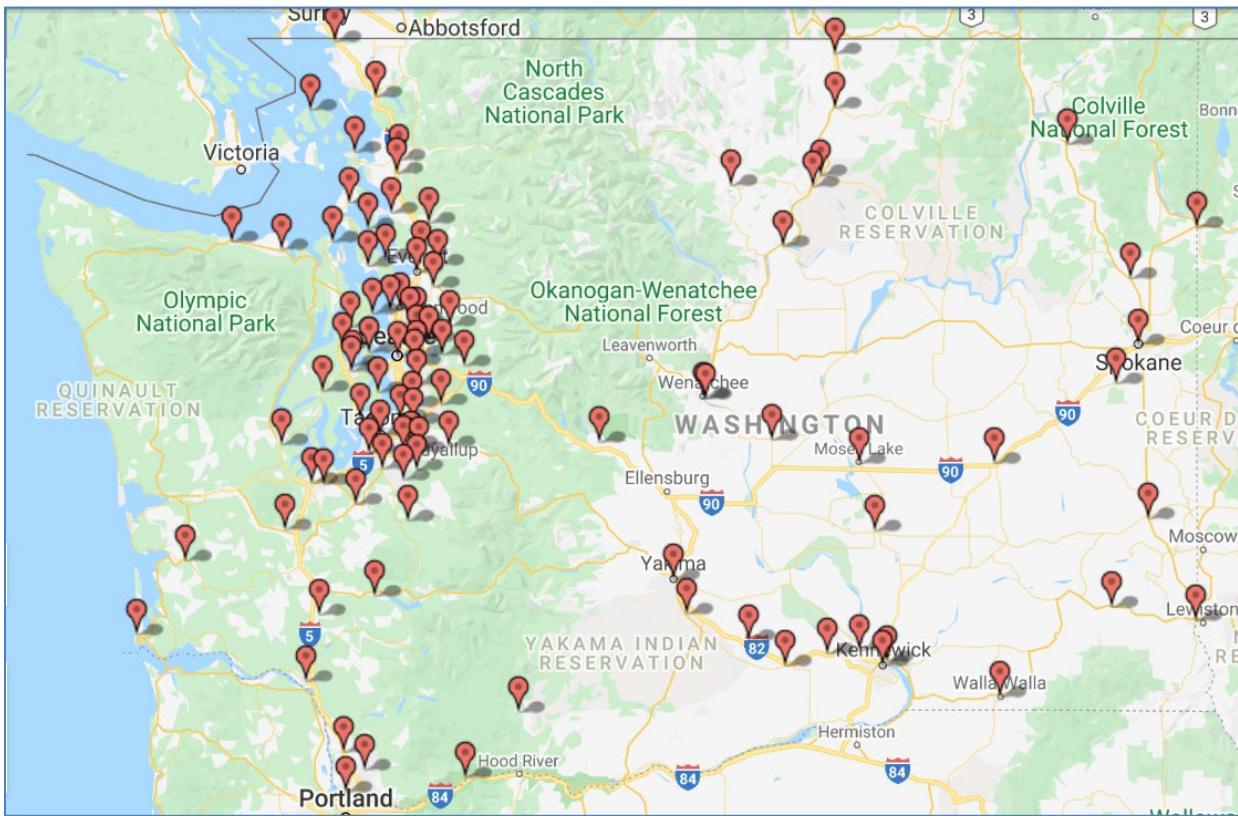
Responses to the 2020 survey came from 7 countries including the United States. While 98.9% of responses were from the United States, 1.0% came from other countries. Each of the international responses described themselves or their business as a small business:

- Canada (3)
- Finland (1)
- Germany (1)
- Japan (1)
- Netherlands (1)
- Portugal (1)

Responses from the United States represented 29 states. The top three states are:

- Washington (81.8%)
- Oregon (4.6%)
- California (4.4%)

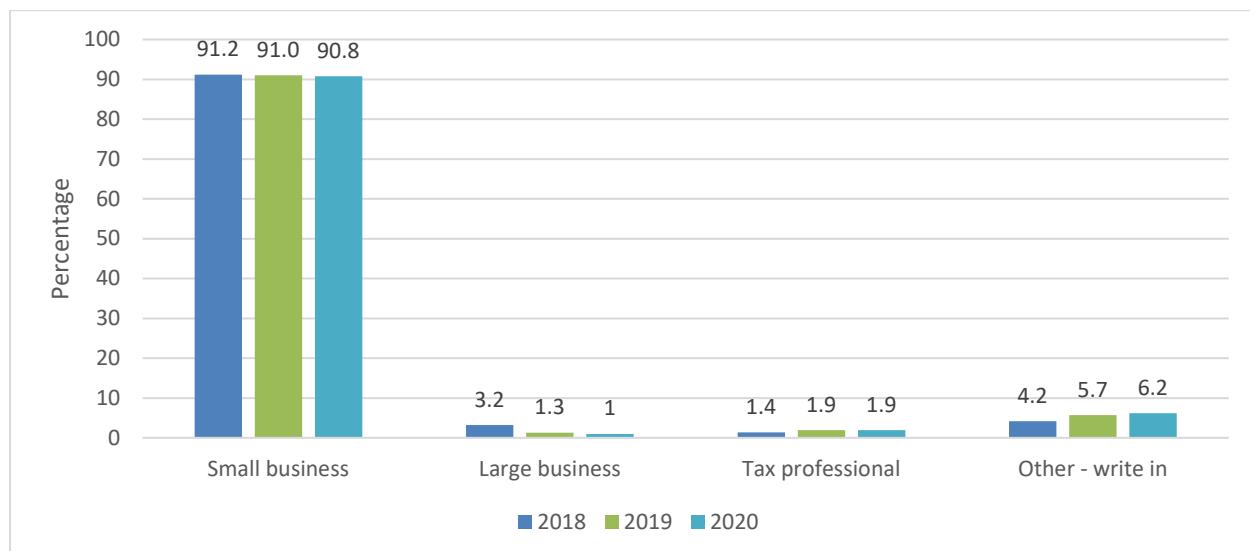
In Washington, responses came from 99 locations throughout the state.



RESULTS

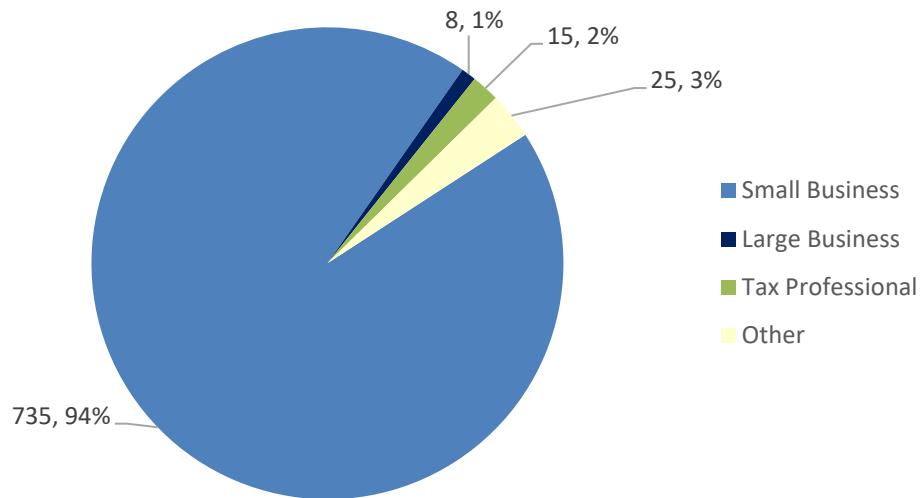
Q1. How would you describe yourself or your business?

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



- The percentage of respondents who described themselves as a **small business** decreased slightly by 0.2% from 2019.
- The percentage of respondents who described themselves as a **large business** also decreased slightly by 0.3% from 2019.
- **Tax professional** percentage had no change from 2019 and was the same with 1.9% of respondents in both 2019 and 2020.
- There was a slight increase in the number of respondents who described themselves as 'Other' from the previous two years. The write-in explanations from respondents who selected 'Other' were categorized into the following:
 - 43% (22) - micro-business, sole proprietorship, or self-employed.
 - 27% (13) - retired or no longer in business.
 - 16% (8) - non-profit organization or government.
 - 6% (3) - bookkeeper/office manager.
 - 6% (3) - blank or undetermined.

If the micro-business, sole proprietorship, or self-employed respondent group is reclassified as small business, the 2020 respondent break down is:

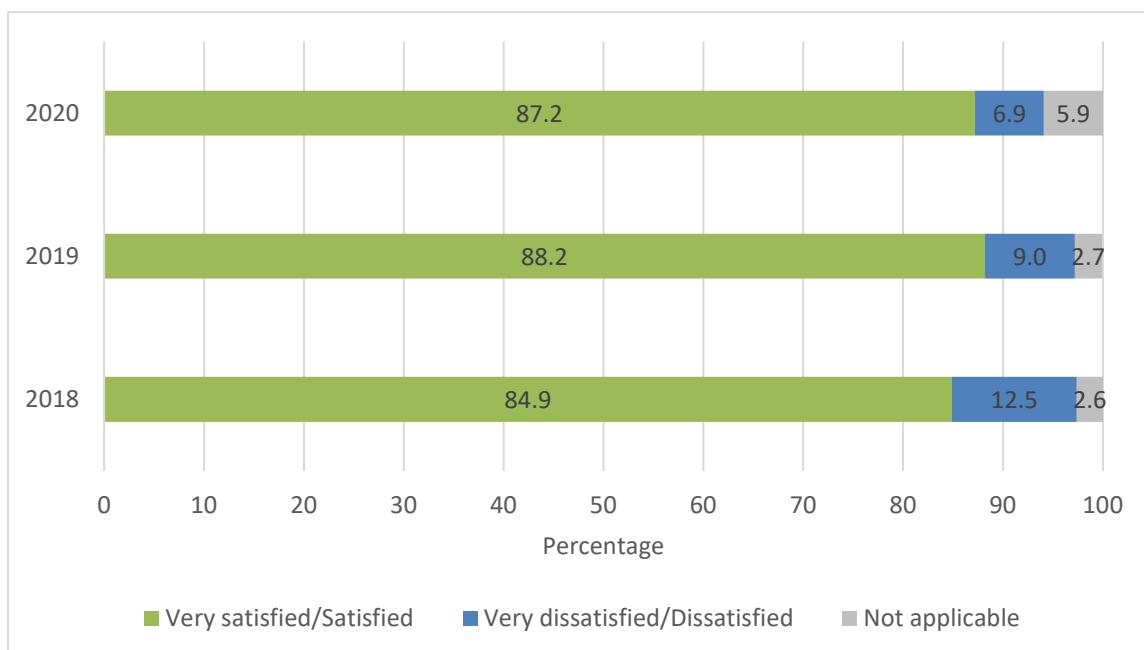


With this reclassification, 94% of respondents are described as a small business.

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.

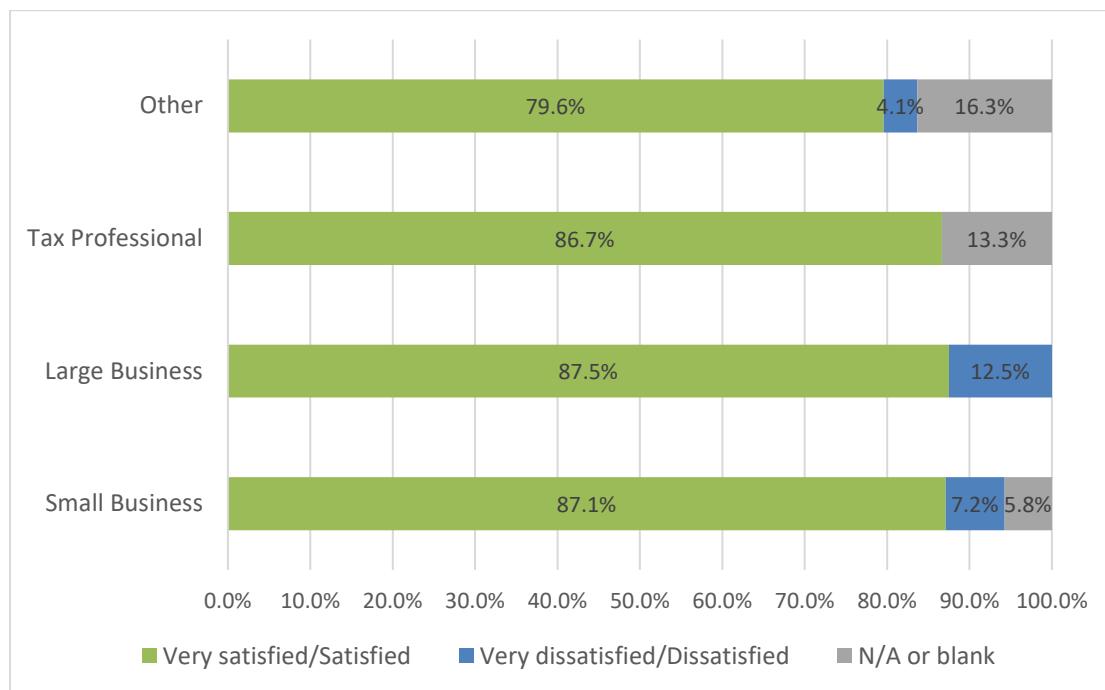
Q2. How satisfied were you after your last experience with us?

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



- Overall satisfaction decreased by 1% from 2019 (88.2%) to 87.2% very satisfied/satisfied in 2020.
- Overall dissatisfaction decreased by 2.1% from 9.0% in 2019 to 6.9% in 2020.
- Not applicable increased by 3.2% from 2.7% in 2019 to 5.9% in 2020.

2020: Overall satisfaction after the respondent's last experience with DOR by description



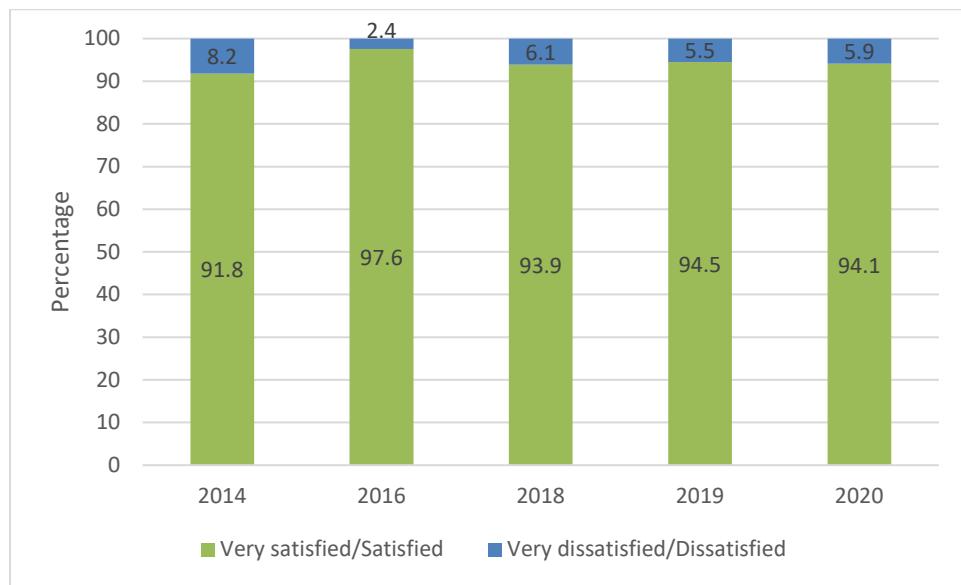
- 86.7% (13) of respondents who described themselves as a **tax professional** were very satisfied/satisfied with no (0) tax professionals indicating that they were dissatisfied.
- 87.5% (7) of respondents who described themselves as a **large business** were very satisfied/satisfied. 1 (13%) respondent was dissatisfied.
- 87.1% (621) of respondents who described themselves as **small business** were very satisfied/satisfied. 51(7%) respondents were very dissatisfied/dissatisfied and 41(6%) selected not applicable or blank.
- 79.6% (39) of respondents describing themselves as **other** were very satisfied/satisfied. 2 (4%) respondents were very dissatisfied/dissatisfied and 8 (16%) selected not applicable or blank.
 - 'Other' types that were micro-business, sole proprietorship, or self-employed businesses were 92% (24) very satisfied/satisfied.
 - Non-profit/government organizations (8) were 88% (7) very satisfied/satisfied.
 - Bookkeepers/Office Managers (3) were 100% very satisfied/satisfied.

Top dissatisfaction themes based on review and categorization of comments:

- Website navigation and My DOR login and account access.
- Not knowing how to file taxes or find services from another agency or government service.
- Frustration with penalties and fees.
- Pandemic-related stress on businesses.

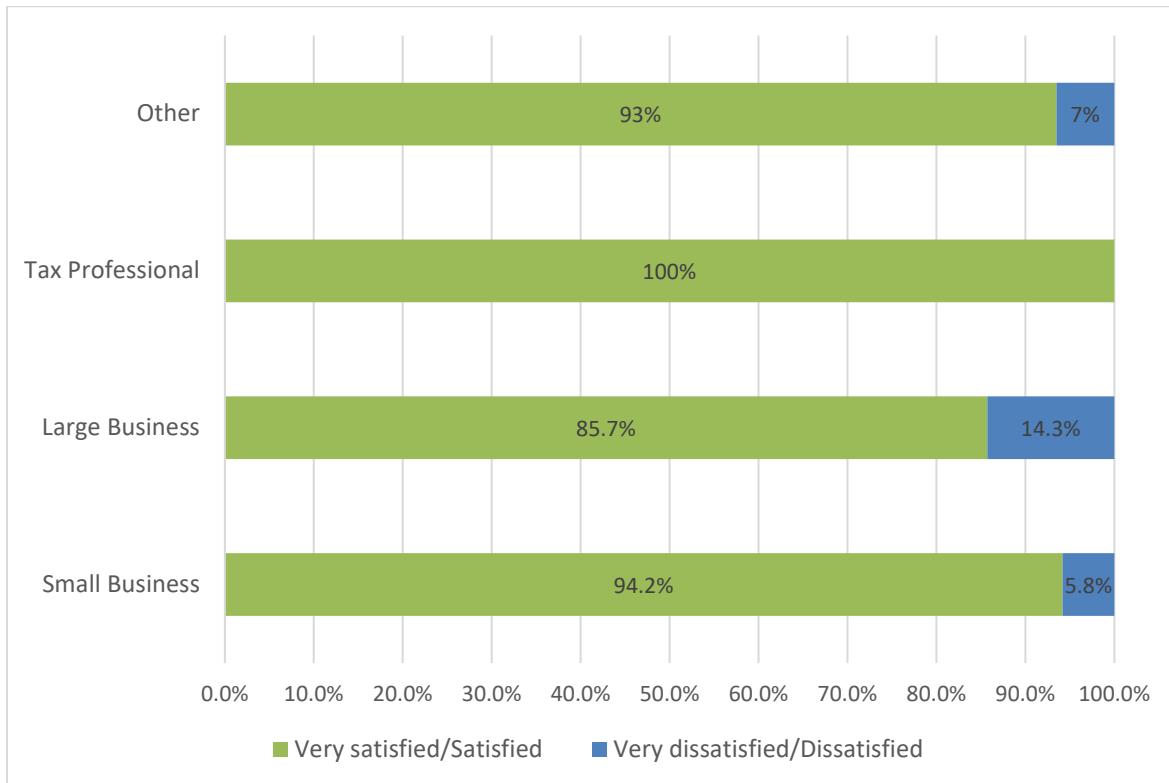
Q3. How satisfied are you with the overall quality of service you receive from the Department of Revenue?

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



- Overall satisfaction decreased slightly by 0.4% from 2019 (94.5%) to 94.1% very satisfied/satisfied in 2020.
- Overall dissatisfaction increased slightly by 0.4% from 5.5% in 2019 to 5.9% in 2020.

2020: Overall satisfaction with DOR's overall quality of service by description



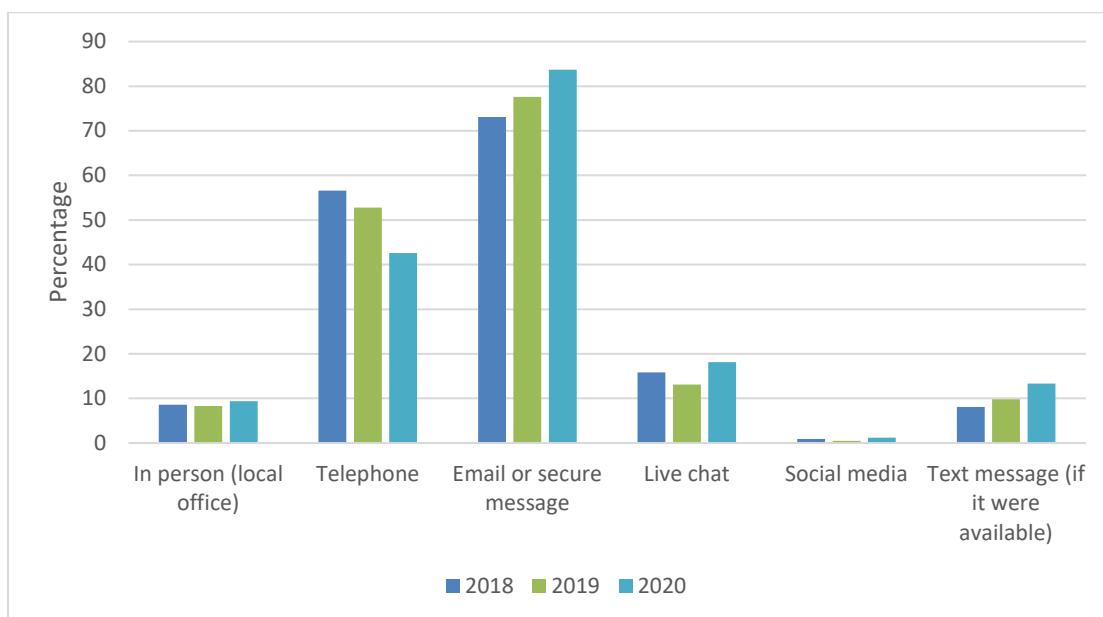
- 100% (14) of respondents who described themselves as a **tax professional** were very satisfied/satisfied with no (0) tax professionals indicating that they were dissatisfied.
- 85.7% (6) of respondents who described themselves as a **large business** were very satisfied/satisfied. 1 (14.3%) respondent was very dissatisfied/dissatisfied.
- 94.2% (664) of respondents who described themselves as **small business** were very satisfied/satisfied. 41 (5.8%) respondents were very dissatisfied/dissatisfied.
- 93.0% (43) of respondents who described themselves as **other** were very satisfied/satisfied. 3 (7%) respondents were very dissatisfied/dissatisfied.
 - 'Other' types that were micro-business, sole proprietorship, or self-employed businesses were 100% (21) very satisfied/satisfied.
 - Non-profit/government organizations (8) were 100% very satisfied/satisfied.
 - Bookkeepers/Office Managers (3) were 100% very satisfied/satisfied.

Top dissatisfaction themes based on the review of comments:

- Website navigation and My DOR login and access.
- Customer service hold and responsiveness.
- Pandemic related stress on businesses.

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

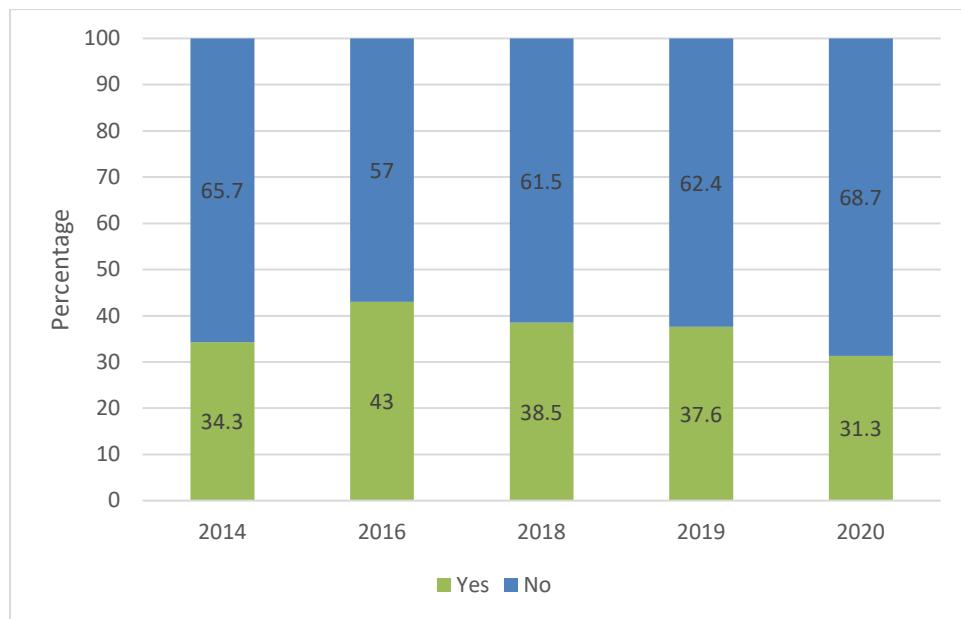
	2018	2019	2020
In person	8.6%	8.3%	9.4%
Telephone	56.6%	52.8%	42.6%
Email or secure message	73.1%	77.6%	83.7%
Live chat	15.8%	13.1%	18.1%
Social media	0.9%	0.5%	1.2%
Text message (if it were available)	8.1%	9.8%	13.3%



- Telephone decreased by 14.0% since 2018. From 2019 to 2020, this decreased by 10%. Telephone remains the second most preferred way to interact with the Department of Revenue since 2018.
- Email or secure message increased by 10.6% since 2018. From 2019 to 2020, it increased 6.1%. Majority of respondents prefer to use email or secure message to interact with the Department of Revenue.
- Live chat increased by 5.0% from 2019 to 2020.
- Text message increased 5.2% since 2018. From 2019 to 2020, it increased by 3.5%.
- In person increased slightly since 2019 by 1.1%.
- Social media continues to be the least preferred method to interact with the Department of Revenue since 2018 even with a slight increase of 0.7% since 2019.

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

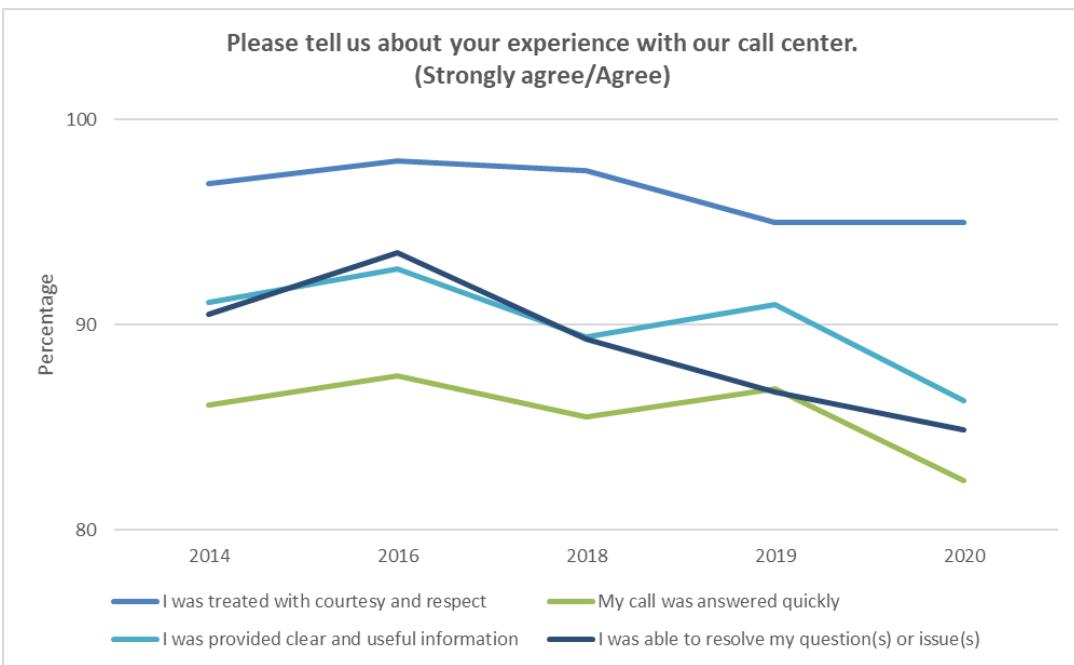
	2014	2016	2018	2019	2020
Yes	34.3%	43.0%	38.5%	37.6%	31.3%
No	65.7%	57.0%	61.5%	62.4%	68.7%



In 2020, the least percentage of respondents contacted the call center since 2014. Since 2016, there has been an 11.7% decrease.

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

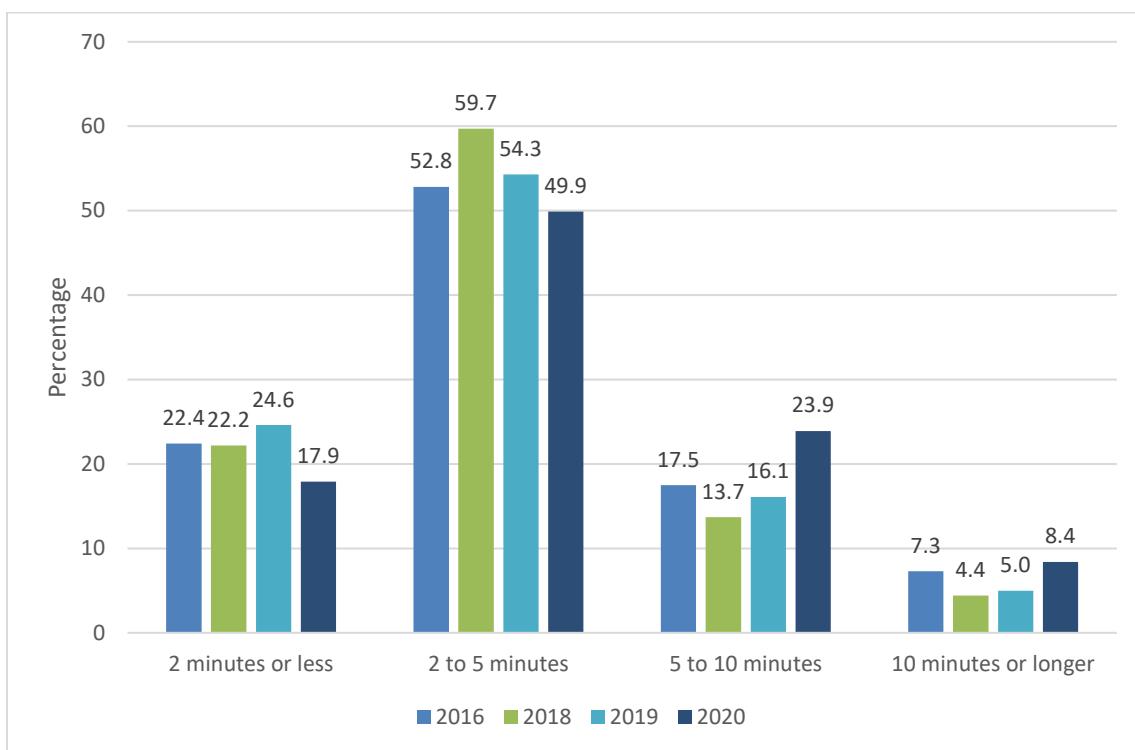
	2014	2016	2018	2019	2020
A. My call was answered timely					
Strongly agree	55.1%	23.1%	37.7%	38.1%	34.0%
Agree	31.0%	64.4%	47.8%	48.8%	48.4%
Disagree	9.5%	10.5%	9.3%	11.9%	12.3%
Strongly disagree	4.4%	2.0%	5.6%	1.2%	5.3%
B. I was treated with courtesy and respect					
Strongly agree	80.8%	57.7%	60.9%	55.2%	54.1%
Agree	16.1%	40.3%	36.6%	39.8%	40.9%
Disagree	2.4%	1.2%	1.9%	3.7%	2.9%
Strongly disagree	0.7%	0.8%	0.6%	1.2%	2.1%
C. I was provided with clear and useful information					
Strongly agree	67.4%	51.6%	50.6%	49.8%	45.2%
Agree	23.7%	41.1%	38.8%	41.2%	41.1%
Disagree	7.9%	6.0%	8.1%	5.3%	9.5%
Strongly disagree	1.0%	1.2%	2.5%	3.7%	4.1%
D. I was able to resolve my question(s) or issue(s)					
Strongly agree	70.6%	49.4%	50.9%	49.6%	46.2%
Agree	19.9%	44.1%	38.4%	37.1%	38.7%
Disagree	6.6%	5.3%	5.7%	9.2%	8.8%
Strongly disagree	3.0%	1.2%	5.0%	4.2%	6.3%



- ***My call was answered quickly*** strongly agree/agree responses decreased by 4.5% since 2019 and is 5.1% lower than the highest percentage in 2016.
- ***I was treated with courtesy and respect*** strongly agree/agree responses were the same as 2019 at 95.0% and is 3% lower than the highest percentage in 2016.
- ***I was provided clear and useful information*** strongly agree/agree responses decreased 4.7% since 2019 and is 6.4% lower than the highest percentage in 2016.
- ***I was able to resolve my question(s) or issue(s)*** strong agree/agree responses decreased by 1.8% since 2019 and is 8.6% lower than the highest percentage in 2016.

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

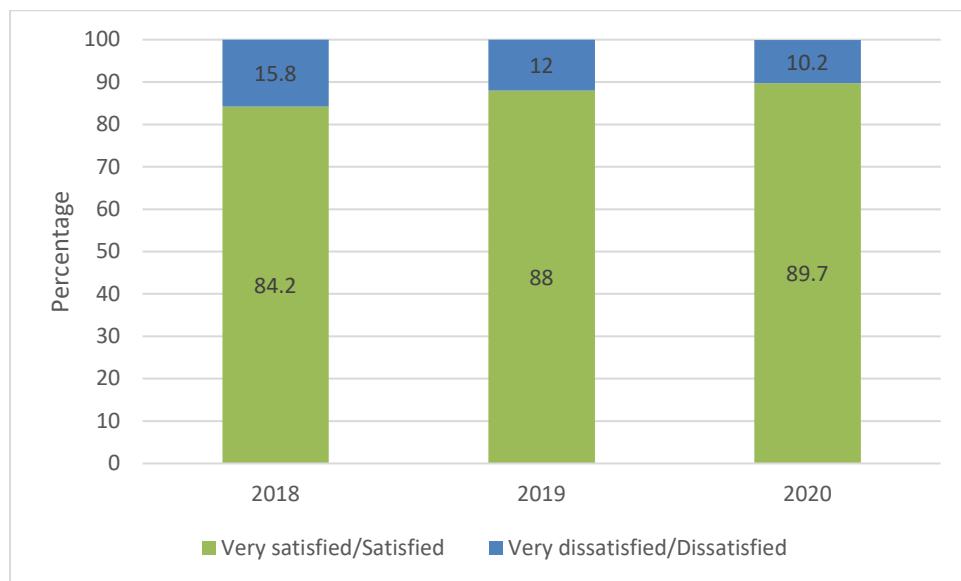
	2016	2018	2019	2020
Less than 2 minutes	22.4%	22.2%	24.6%	17.9%
2 to 5 minutes	52.8%	59.7%	54.3%	49.9%
5 to 10 minutes	17.5%	13.7%	16.1%	23.9%
10 minutes or longer	7.3%	4.4%	5.0%	8.4%



- In 2020, 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 11.2%.
- In 2020, waiting for 2 minutes or less decreased by 6.7% from 2019.
- Waiting 10 minutes or longer increased by 3.4% from 2019.

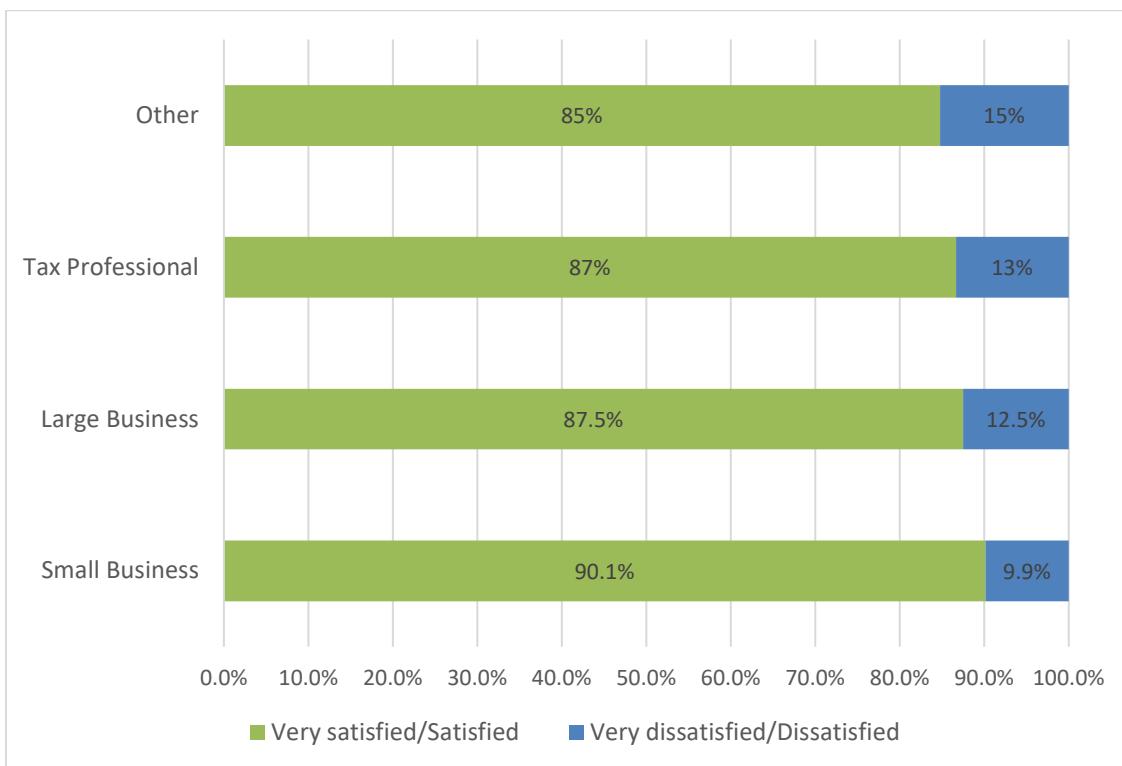
Q8. How satisfied are you with our website and My DOR (online filing and payment system)?

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



In 2020, very satisfied/satisfied responses increased by 5.5% from 2018 and 1.7% from 2019 for a 3-year high of 89.7%.

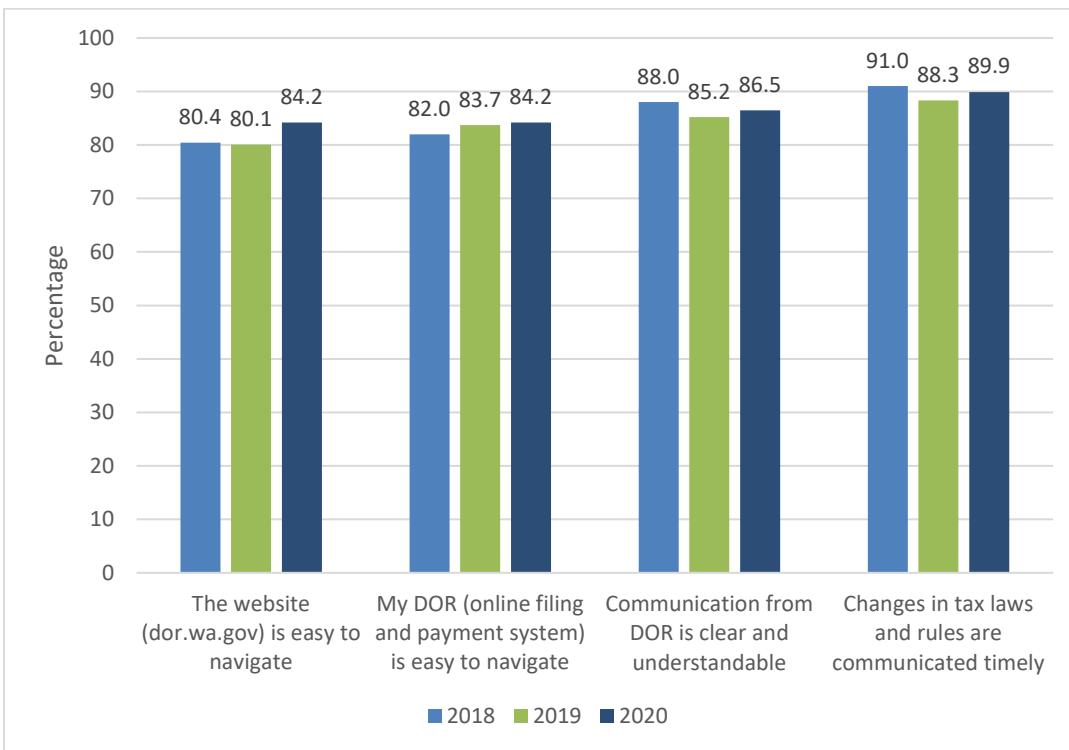
2020: Overall satisfaction with the DOR website and My DOR by description



- 87.0% (13) of respondents who described themselves as a **tax professional** were very satisfied/satisfied and 12% (2) tax professionals indicated that they were dissatisfied.
- 87.5% (7) of respondents who described themselves as a **large business** were very satisfied/satisfied. 1 (12.5%) respondent was very dissatisfied/dissatisfied.
- 90.1% (640) of respondents who described themselves as **small business** were very satisfied/satisfied. 70 (9.9%) respondents were very dissatisfied/dissatisfied.
- 85.0% (39) of respondents who described themselves as **other** were very satisfied/satisfied. 7 (15.0%) respondents were very dissatisfied/dissatisfied.
 - 'Other' types that were micro-business, sole proprietorship, or self-employed businesses were 90.9% (20) very satisfied/satisfied.
 - Non-profit/government organizations (8) were 87.5% very satisfied/satisfied.
 - Bookkeepers/Office Managers (3) were 100% very satisfied/satisfied.
 - Retired/No longer in business (10) were 70.0% very satisfied/satisfied and 30.0% dissatisfied.

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

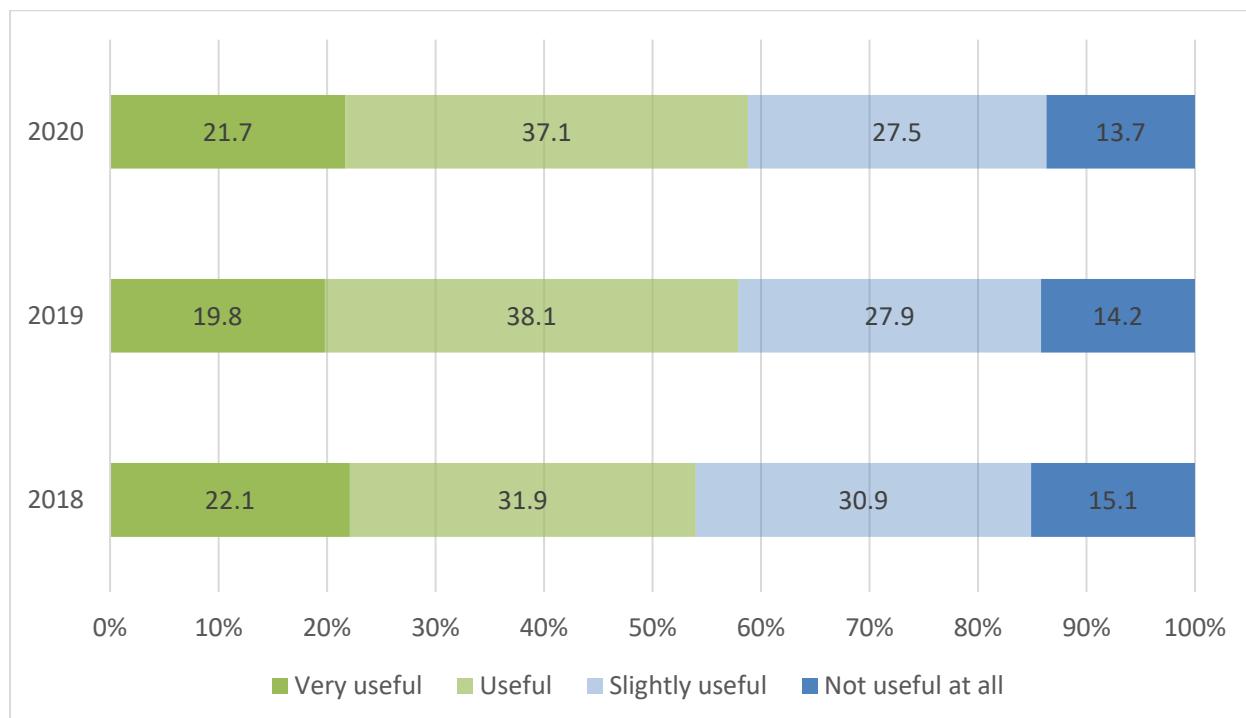
	2018	2019	2020
A. The website (dor.wa.gov) is easy to navigate			
Strongly agree	20.1%	22.2%	19.2%
Agree	60.3%	57.9%	65.0%
Disagree	13.4%	16.3%	13.0%
Strongly disagree	6.2%	3.5%	2.8%
B. My DOR (online filing and payment system) is easy to navigate			
Strongly agree	24.2%	28.8%	23.7%
Agree	57.8%	54.9%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



- ***The website (dor.wa.gov) is easy to navigate*** strongly agree/agree responses increased by 4.1% since 2019.
- ***My DOR (online filing and payment system) is easy to navigate*** strongly agree/agree responses increased slightly by 0.5% from 83.7% in 2019 to 84.2% in 2020. 2020 had the highest percentage of agreement for this statement since 2018.
- ***Communication from DOR is clear and understandable*** strongly agree/agree responses increased 1.3% since 2019.
- ***Changes in tax laws and rules are communicated timely*** strong agree/agree responses increased by 1.6% since 2019.
- Overall agreement to the statements in Question 8 increased by an average 1.88% from 2019 to 2020.

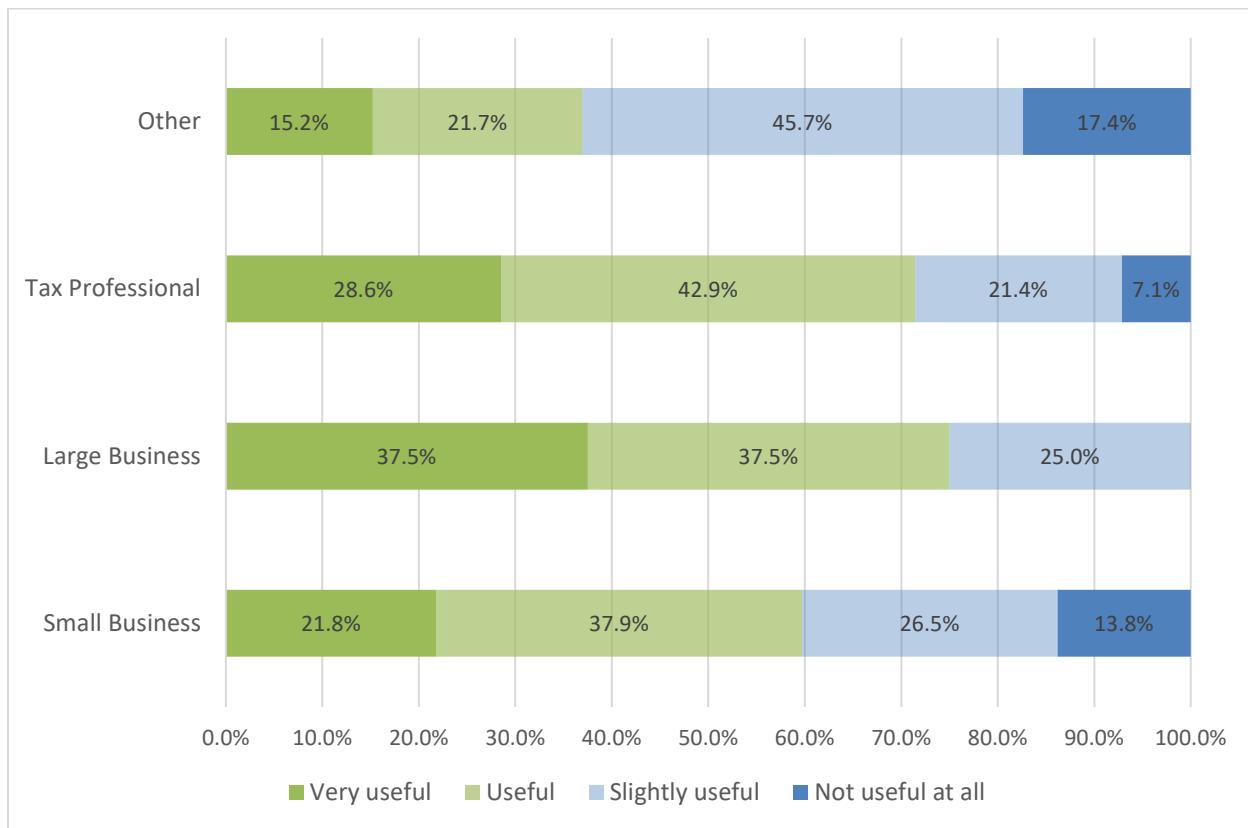
Q10. How useful would it be to participate in online training (webinar) that teaches you about taxes?

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



Overall perception of the usefulness of online training about taxes increased slightly by 0.9% from 57.9% in 2019 to 58.8% in 2020.

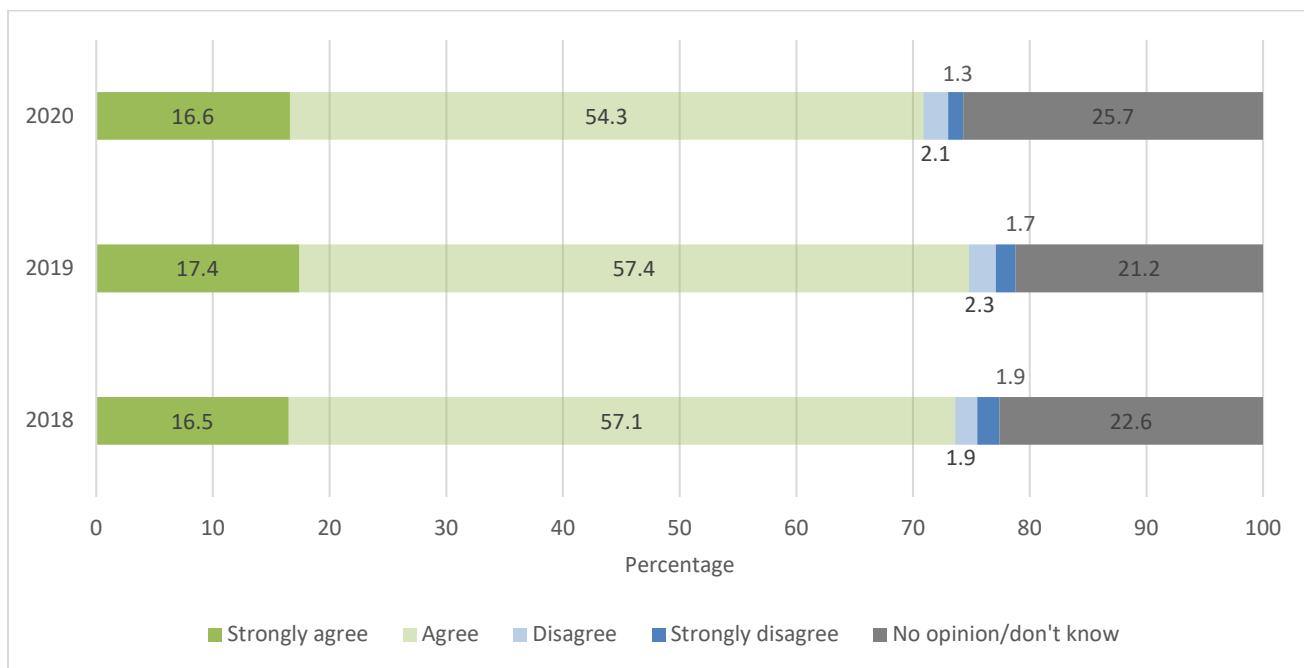
2020: Perception of online training (webinar) about taxes by description



- A higher percentage of respondents who describe themselves as a **tax professional** (71.5%) or **large business** (75.0%) perceive online training about taxes as more useful.
- 36.9% (17) of respondents who described themselves as **other** find participation in online training about taxes as very useful/useful.
 - 36.4% of micro-business, sole proprietorship, or self-employed businesses (22) would find online training very useful/useful.
 - 50.0% of non-profit/government organizations (8) would find online training very useful/useful.
 - 60.0% of bookkeepers/office managers (3) would find online training very useful/useful.
 - 30.0% of retired/No longer in business (10) would find online training very useful/useful.

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?

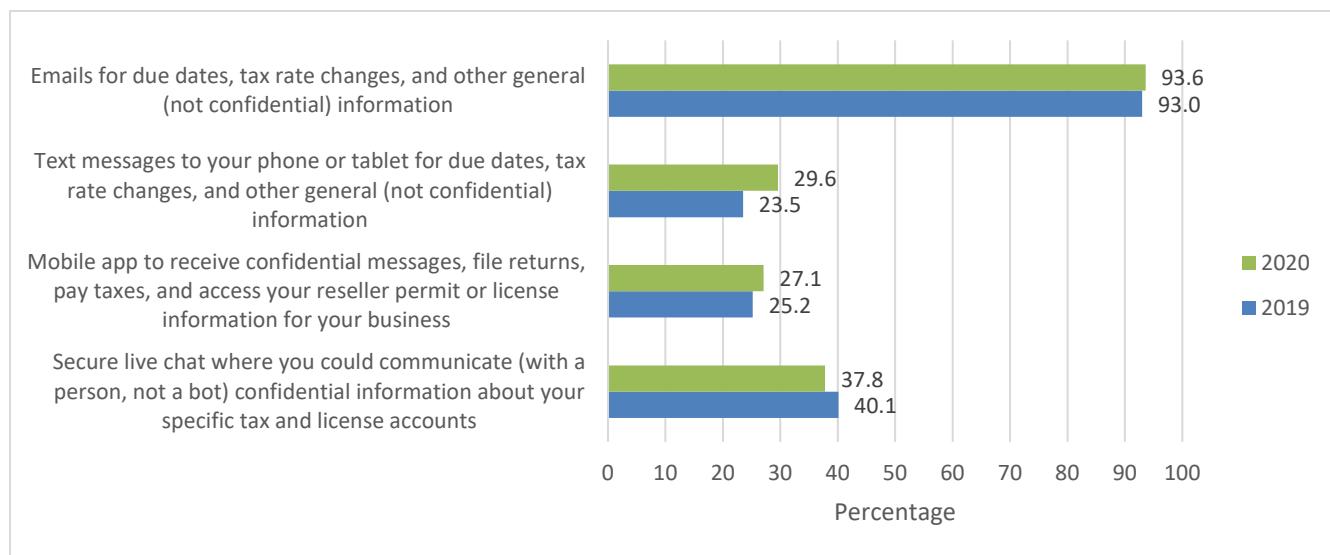
	2018	2019	2020
Strongly agree	16.5%	17.4%	16.6%
Agree	57.1%	57.4%	54.3%
Disagree	1.9%	2.3%	2.1%
Strongly disagree	1.9%	1.7%	1.3%
No opinion/don't know	22.6%	21.2%	25.7%



- Strongly agree/agree decreased by 3.9% from 2019.
- Disagree/strongly disagree slightly decreased by 0.6% from 2019.
- No opinion/don't know responses increased by 4.5% from 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
A. Emails for due dates, tax rate changes, and other general (not confidential) information	93.0%	93.6%
B. Text messages to your phone or tablet for due dates, tax rate changes, and other general (not confidential) information	23.5%	29.6%
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%
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%



- All offerings increased in 2020, except for secure live chat which decreased by 2.3% from 2019.
- Text messages increased the most with a 6.1% from 2019.
- Both emails and the mobile app slightly increased by 0.6% and 1.9% respectively from 2019.

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

	Responses	Percent
Answered	273	34.7%
Skipped	513	65.3%
Total	786	100.0%

Top themes and comment sampling

- 58 responses indicated that our services (including our online services) work well and we should continue "doing what we are doing".

Everything works well and I am satisfied using the online portal for almost all of my needs.

All seems straight forward. Website updates have been very helpful in making filing easier. Please continue to do so. Also your email letters are very helpful. Thank you.

- 35 responses were related to education and outreach offerings.

Explain better on how to use My DOR. Have customer service help walk a person through the problem, they are having.

Please set up a guide for new business owners as well as a small self-quiz to let new business owners be able to find out what taxes they need to pay.

- 28 responses were related to reminders and notifications improvements.

When sending a secure message about renewal of licenses, it would be helpful to know which one instead of having to open up email to find out which one is renewing.

Reminders should be automatic on all tax accounts filled online.

- 28 responses referenced our online services (dor.wa.gov and My DOR) and 12 of these comments were related to logging in or accessing online accounts.

Continue fixing bugs & making DOR Excise tax site easier to use.

Seems like a universal passcodes for the state of WA or SAW is a pain. Every time I try to do one thing or another for a different agency I have to change passwords. I prefer a password for L & I a password for B & O and a Password for billing to L & I.

Q14. Please tell us what we are doing well.

	Responses	Percent
Answered	264	33.6%
Skipped	522	66.4%
Total	786	100.0%

Top themes and comment sampling

- 88 comments included reference to our online services, ease of use for filing, and recent improvements.

*Your website is great, and makes filing quarterlies a very efficient and simple process.
THANK YOU!*

Improved tax filing website is a lot less confusing and easier to navigate.

Website is easy to read; nicely displayed. You seem very committed to continuous improvement, to listening to those you serve and following through on suggestion made. I really appreciate that in this complex, non-personal world- especially from the perspective of being a very small business with very little support to help me navigate tax requirements. Thank you.

I think the website is great. Very easy file returns online and information is clearly posted. When I can't find something or need help, your people are very willing to field questions and are very helpful.

- 53 responses included references to the quality of customer service.

I really appreciate the accommodating friendly people you seem to staff the office with. I have NEVER experienced such pleasant people from any government agency that I have dealt with in the past.

I prefer telephone and I love the people who answer the phone and help me. They are always efficient and helpful and solve my problems. I should call them more often. I wish every office I call had people as nice as your office.

You guys were very nice and quick.

- 50 comments referenced communications including filing reminders, letters, and sales tax change notifications.

Communication is timely and concise. The "due date" emails are extremely helpful.

I appreciate email reminders for filing dates. There are so many different deadlines that they're easy to confuse.

Overall good communications and keeping me informed.

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

	Responses	Percent
Answered	247	31.4%
Skipped	539	68.6%
Total	786	100.0%

Top themes and comment sampling

- 52 responses cited communications, including due date reminders, and tax change notifications.

Updating taxpayers in advance about significant changes via electronic communications as well as snail mail. This is incredibly helpful when the same information is delivered in both electronic and regular mail formats.

Never stop the communication ...whether it is timely or not, the fact that an on-going relationship builds trust and support for all involved. I thank you!

Any reminder or notice of change is very beneficial; be it in email or paper.

- 45 comments referenced having a customer service representative available for assistance, including having kind, patient, and courteous staff, and the ability to connect with a live person.

Always provide an option to speak to a real person (by phone or chat) if needed.

BEING THERE TO HELP US.

Never stop allowing taxpayers to talk to actual human beings. Your staff is really helpful, and no amount of website tutorials will ever replace being able to ask a person a question and get an informed answer.

Hiring and training GREAT PEOPLE!!! Hey, I am talking about Government Tax Agents :)

- 44 comments cited making improvements that included online services and continuing listening to feedback.

Working to improve easy of operation and navigation. It's good now but things can always be improved.

Looking at the latest systems and ensuring that there is always continuous improvement in streamlining taxes, payments and information to businesses. You have done that well, so keep it up!

Never stop asking, listening, and focusing on continuous improvement in your services, including clarify of directions.