

NSW Department of Customer Service

Waratah Masterbrand Research Report
17 December 2019



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About this report

The Waratah is the overarching masterbrand of the NSW Government.

This report details the findings of research Kantar Public Division have conducted for the NSW Department of Customer Service to understand the Waratah and what it offers. To date, this research has included two stages of fieldwork with NSW residents – a stage of qualitative consultations, followed by a quantitative stage.

This research is not a ‘brand study’ – this work does not aim to provide the NSW Government with advice and recommendations in relation to altering the Waratah or changing the masterbrand...this is not within the remit of this work and should be considered outside the scope of any recommendations within this report.

Rather, the key objective of this work is to provide the NSW Government with insight into how the equity and strength of the Waratah can be used to improve how citizens engage with Government – to smooth service navigation, to ensure accountability and to clarify complexity.

This is the final report for the stages conducted to date.



Aims and objectives

We need to get beyond understanding citizen 'awareness' of the masterbrand...

...we need a roadmap to help the NSW Government improve engagement for citizens in government services and support

To provide a sound evidence base to understand the Waratah – its equity, the role that it plays for citizens and the ability for the brand to help citizens engage across a range of different interaction types (referred to as 'Territories in this report')

What does the Waratah *mean* to citizens of NSW?

How is the brand perceived – what are the *emotive and functional understandings* for the masterbrand currently?

What is driving *brand perception*? What plays a role in this (demographic, experience, awareness, etc.)?

Does the masterbrand have *different expressions across different 'Territories'* (service engagement, interactions with Government, etc.)?

What service touchpoints are influenced by brand – what is the *role of brand at key gateways*?

What benefits does the masterbrand offer?

How are *citizens impacted by the masterbrand* – what functional benefits are offered through masterbrand provision?

How does the *masterbrand influence engagement with Government* – how does it enhance the experience, how might it inhibit the experience?

Does what the masterbrand offers *shift by Territory or interaction* with Government – how?

How can the masterbrand flex, shift and move?

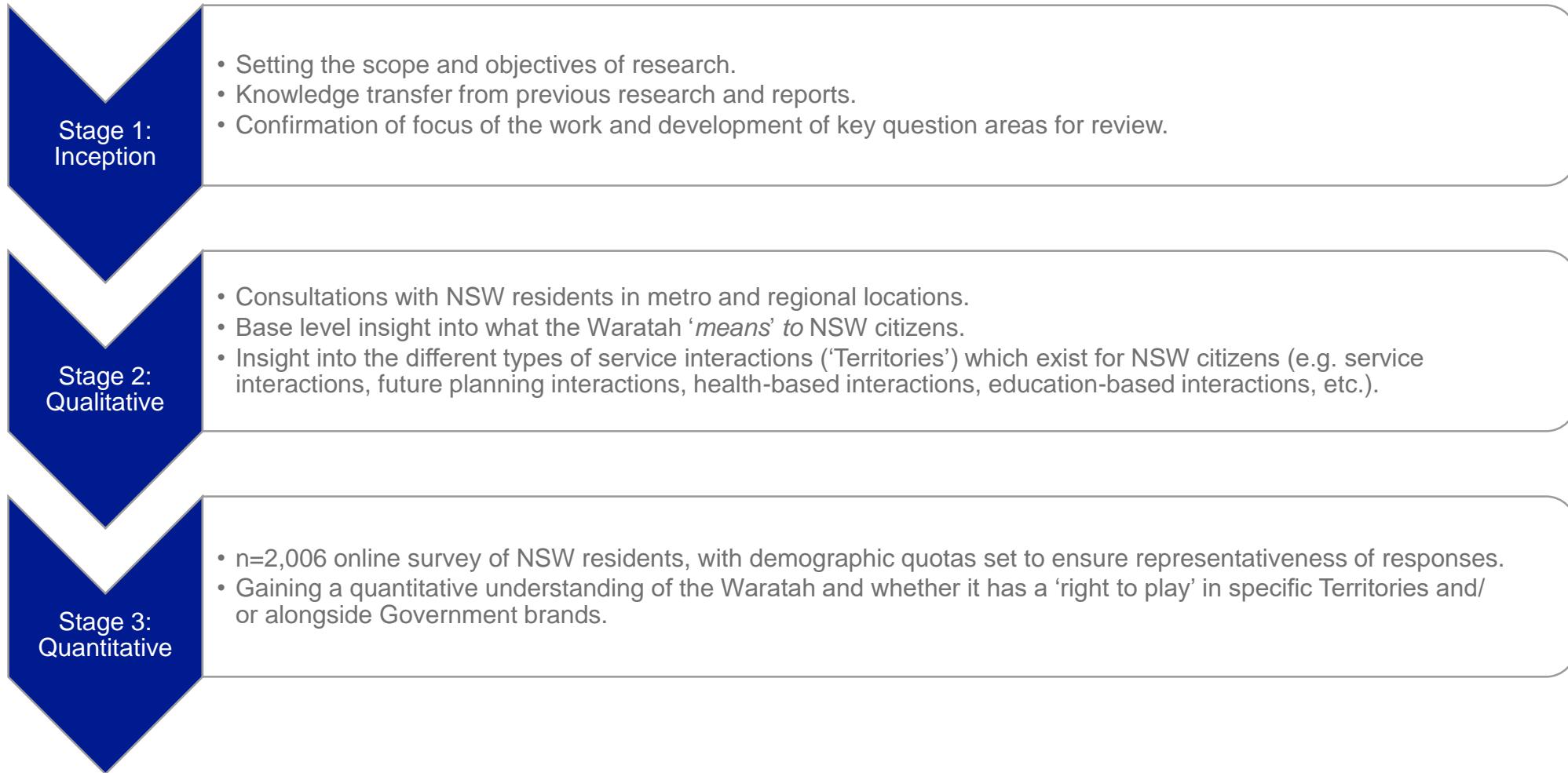
What Territories/interactions can the *masterbrand own*?

What Territories/interactions *require support or enhancement* for the masterbrand to occupy?

Are there *Territories/interactions which are difficult/not possible* for the masterbrand to occupy?

What needs to be done to *mitigate the risk of using the Waratah* across different service interactions or Territories?

The project phases to date



Stage 2 – Qualitative stage: We consulted with a broad range of citizens throughout the state

WHAT WE DID

8 focus groups throughout the state:

Age	<26	26-39	40-59	60+
Sydney CBD	✓		✓	
Western Sydney		✓		✓
Wagga Wagga	✓			✓*
Griffith		✓	✓	



n=55 participants.



110 hours of consultation across the sample (approx.).



Fieldwork between 29 July and 1 August 2019.

HOW WE DID IT

1. Understanding the **Waratah** in isolation:

Projection exercise

2. Understanding the **interactions** and **responsibilities** from the citizen perspective:

Brainstorming

3. What are the '**needs**' across interactions and responsibilities:

Grouping exercise

4. What is the Waratah's **influence** in each 'Territory'?

Placing the brand in each Territory

What we learnt in the qualitative consultations

The qualitative consultations demonstrated that...



Sentiment toward the Waratah is largely positive; offering certainty, strength, and represents a shared history.



The Waratah's strengths come with associated weaknesses; it can lack caring, friendliness and energy.



The Waratah fits naturally into transactional Territories, although it could be better used to help citizens navigate other types of interaction with Government.

Stage 3 – Quantitative stage: We surveyed a representative sample of NSW citizens

WHAT WE DID



An **online survey**, completed on desktop and mobile.



NSW residents aged 18+.



n=2,006 participants completed the survey.



Weighted to ensure NSW representativeness.



Approx. **18 mins** to complete (median).



Fieldwork between **1 and 14 October 2019**.

	Final sample profile	Unweighted	Weighted
Age	18-24	12%	12%
	25-30	11%	11%
	31-40	17%	18%
	41-50	16%	17%
	51-60	16%	16%
	61-70	16%	13%
	71-80	10%	8%
Gender	81+	2%	6%
	Male	49%	49%
Location	Female	51%	51%
	Metro	65%	65%
	Regional	35%	35%

What we learnt in the quantitative stage

	The Waratah has high familiarity	94% of residents saying they have seen the Waratah.
	The Waratah has strong equity	With 55% of residents favourable toward its services and only 11% unfavourable.
	Its brand attributes are strong as well	60% agree it represents quality service, and more than half of residents agree that it is community-focused (57%), future-focused (56%), trustworthy (56%), fair (54%), accountable (53%) and honest/ethical (53%). Fewer than one in five disagree for each attribute (14-19%).
	The Waratah represents competence and authority above all other associations	It is professional and efficient as well as informative. There may be opportunities for the Waratah to enhance competence and authority for its brands.
	The Waratah also represents warmth, through a sense of inclusion as part of the community	It has credibility alongside 'warmer' brands.
	It lacks association with caring, fun and energy	This may account for 29% thinking it is complex, 29% busy, 22% conservative and 16% arrogant.
	While performing well for showing empathy and understanding...	This is the Waratah's weakest brand attribute (47% agree and 22% disagree).
	The Waratah has similar associations to administrative or 'maintenance of society' interactions, where competence and authority are the most important factors	The Waratah is already strongly present in these interactions. For other types of interactions, there may be opportunities depending on individual brand performance for competence and authority.



Interpreting this report

Findings throughout this report are presented at the overall (NSW population) level. Where appropriate, we have analysed, presented and interpreted findings among key demographic audiences as well as among particular attitudinal and behavioural profiles. Where possible, data is analysed to identify differences among the following population segments:

Gender



Age



Location (i.e. metro and regional*)



Household income range



Employment status



Language spoken at home (English vs. other)



Aboriginal and/or Torres Strait Islander status



NSW Government employment





**What the
Waratah means
to NSW citizens**

The Waratah is known and favourable

The qualitative consultations indicated that favourability toward the Waratah is high - participants felt that it is relevant and meaningful. They expressed a sense of pride in the Waratah, of ownership and of familiarity...it was seen as part of the community, something that everyone knew about and 'owned'.

Quantitatively, this familiarity and favourability was also demonstrated. Both awareness (94%) and favourability (55%) are high – this favourability is high across regional (outer regional/remote; 51%) and metropolitan (56%) respondents.

The small proportion of citizens who did not recognise the Waratah (6%) were more likely to be:

- Male (7% did not recognise it); and
- Younger (aged 25-40) (9%).



High familiarity: 94% of NSW residents say they have seen the Waratah



■ Seen Waratah
■ Not seen Waratah



“

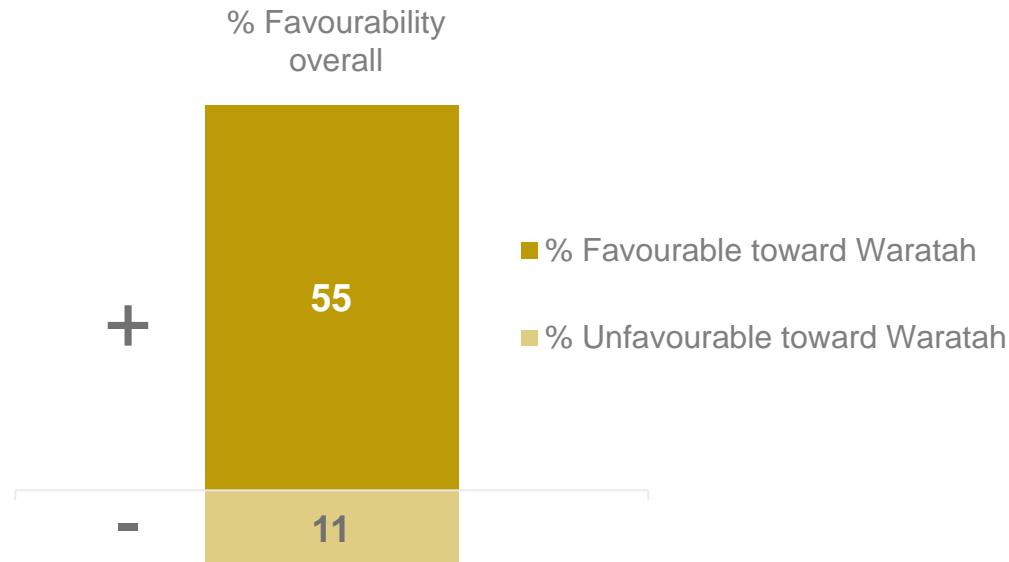
The logo, a stylised Waratah, encompasses all of NSW. When I see it, I know I'm dealing with a NSW Government agency.

Waratah is the state flower of NSW and used as a Government logo.

”

Strong equity: net favourability is high and people know what the Waratah stands for

More than half of participants are favourable toward services that have the Waratah (55%). Eleven percent are unfavourable. One-third of citizens (33%) are 'neither favourable nor unfavourable'. Similarly, majorities agree that the Waratah displays its intended attributes, with the exception of 'empathetic/understanding'.



“

Well I would suppose that anything supported by the Government is **responsible and ethical**.

	+	-
Quality service	60	14
Community-focused	57	15
Future-focused	56	15
Trustworthy	56	16
Fair	54	15
Accountable	53	19
Honest/ethical	53	17
Empathetic/understanding	47	22

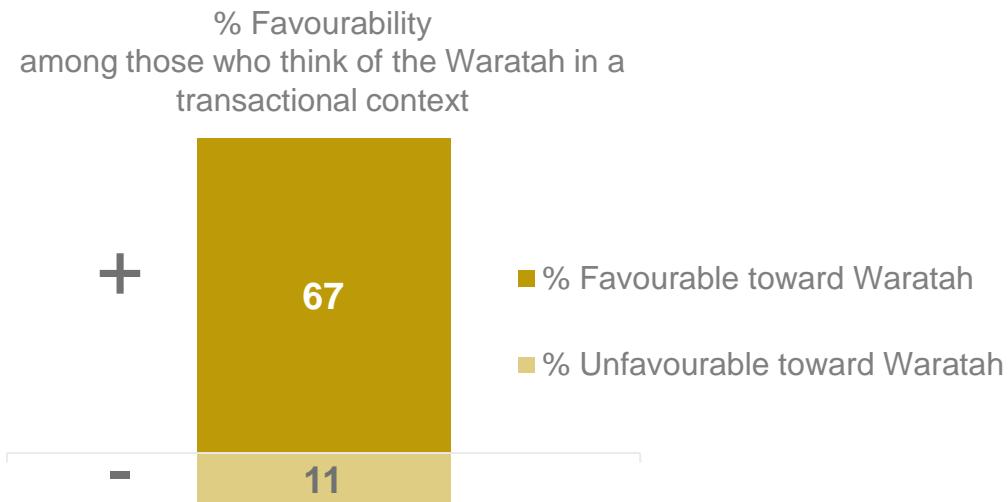
- % Agree the Waratah is...
- % Disagree the Waratah is...

When you see the design it stands out...you know that **they have done good things in NSW**.

”

Transactionally-based: favourability improves when citizens think about a transaction

Respondents were asked to describe specific interaction types they may have had with the NSW Government – transactional interactions were the most commonly mentioned (19% of all participants). When we look at the pool of citizens who have had a transaction engagement with the NSW Government, we see that favourability associated with the Waratah increases to 67% (with 11% unfavourable and the remaining 22% ‘neither favourable nor unfavourable’).



	+	-
Quality service	73	10
Community-focused	64	12
Future-focused	61	10
Trustworthy	69	12
Fair	66	13
Accountable	62	16
Honest/ethical	64	12
Empathetic/understanding	53	21

- % Agree the Waratah is...
- % Disagree the Waratah is...

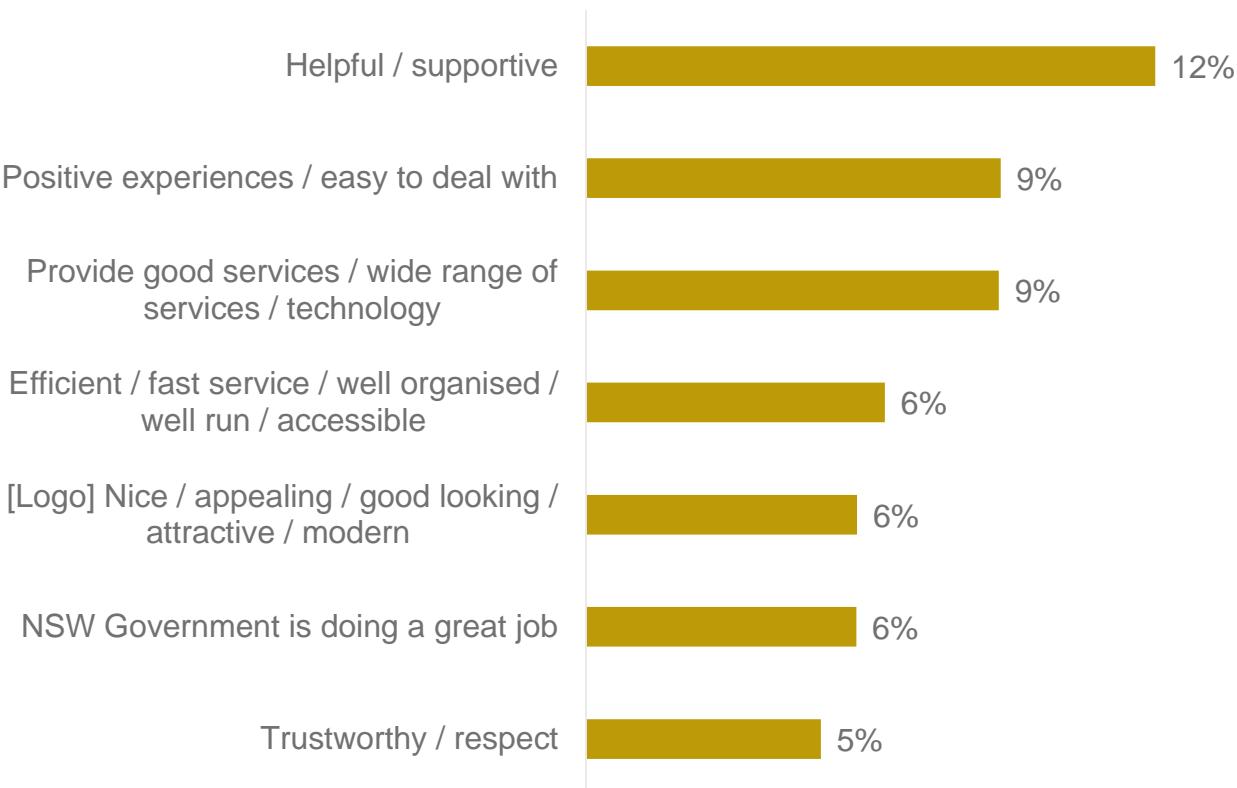
“They knew what they were doing and it was quick and easy.

All my dealings with services associated with this logo have been positive and staff professional, helpful.

Favourability appears to be driven by positive service experience

When asked to indicate why they were favourable toward the Waratah, the most commonly cited responses were linked to service-related engagements rather than higher-order, whole-of-Government attributes. Help citizens had received and the quality of service experiences (ease and breadth of services) underpinned the overarching brand sentiment.

Experiences when thinking about the Waratah (favourability)

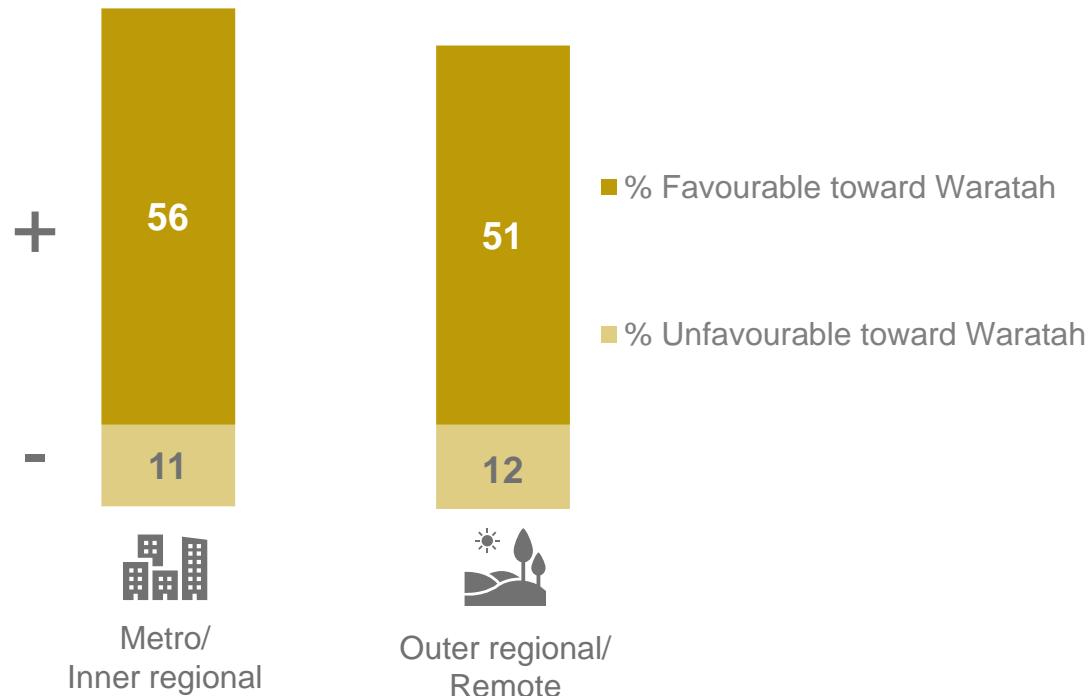


This is something that was also clearly demonstrated in the qualitative consultations – positive views of the Waratah were often underpinned by positive service experiences and previous service engagements.

Higher order attributes such as ‘trust’ or ‘innovation’ were not top of mind and did not drive positive sentiment – transactions dominated perceptions.

Strong equity in both metro and non-metro areas

Skews in favourability are present between metropolitan and outer-regional/remote/very remote audiences. Aligning with the qualitative consultations, and potentially a direct result of the more personal service engagement with Government that regional/remote/very remote citizens have (particularly regional given the sample proportions), favourability for metropolitan audiences (56%) is higher than for regional/remote/very remote audiences (51%). What we don't see is an increase in 'unfavourability' as we shift away from metropolitan areas (11% in metropolitan/inner regional areas and 12% in outer regional/remote areas) – neutrality increases (from 33% to 37%), but active unfavourability does not.



	+	-	+	-
Quality service	61	13	59	15
Community-focused	59	14	55	16
Future-focused	59	14	51	16
Trustworthy	57	15	54	18
Fair	55	14	52	18
Accountable	54	17	51	21
Honest/ethical	54	16	51	18
Empathetic/understanding	48	21	45	23

% Agree the Waratah is... % Disagree the Waratah is...

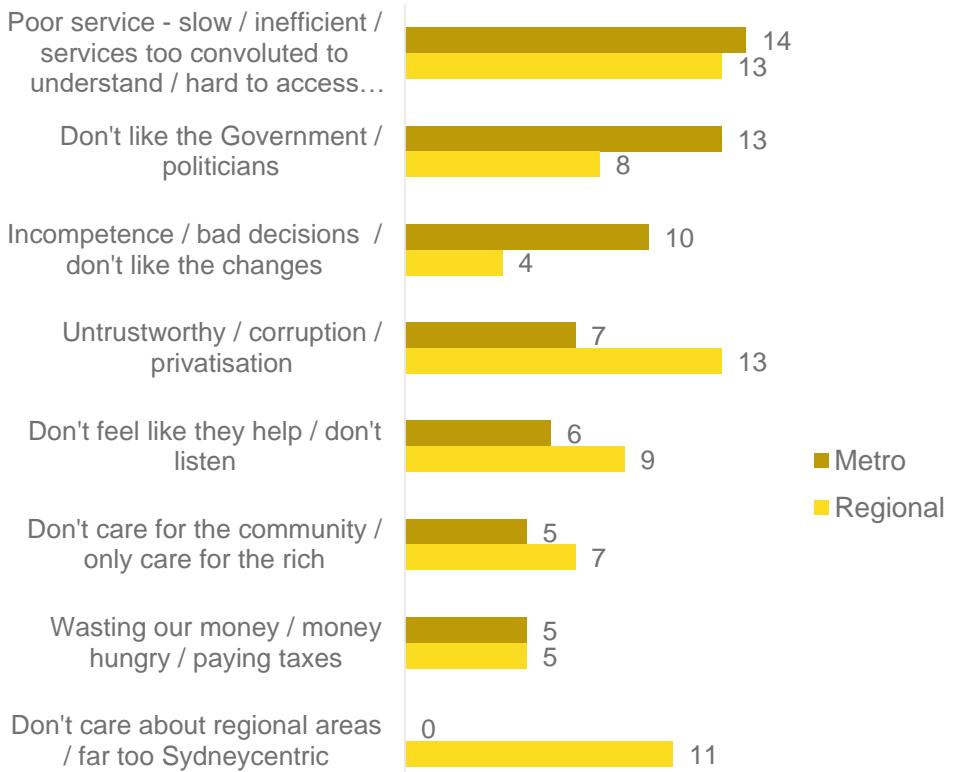
Unfavourability is influenced by heuristics about ‘the government’

The chart below shows the most common reasons given for unfavourability among those who said they have an unfavourable impression of services with the Waratah (i.e. 11% of participants). Citizen experiences are important when it comes to drivers of unfavourability – however, we also see the emergence of issues associated with views of ‘the government’, including general issues with politics/governments, heuristics associated with lack of trust or engagement and deeply held views about the ability of government to deliver on its promises.

What are Heuristics:

Heuristics are mental shortcuts – ways of thinking that allow us to judge and view certain aspects of our lives quickly and easily. Heuristics here relate to ‘government’ at a general level – long held or stereotypical views of government functioning as a generic, and not necessarily considered, view of specific NSW Government services or citizen experiences.

Drivers of unfavourability, by metro and regional (%)



● Experience and heuristics expressed by unfavourable residents vary slightly, among metro and regional audiences.

● We begin to see that regional audiences are more likely to base their unfavourability on feelings of being left behind by the State Government. This is reflected by ‘Don’t feel like they help/don’t listen’; ‘Don’t care about regional areas/Sydneycentric’; and ‘Untrustworthy/corruption/privatisation’ over-indexing among regional residents.

● Among metro audiences, we see a blurring of the lines of Government as a service and Government as politicians, with metro residents over-indexing on ‘Don’t like the Government / politicians’ and ‘Incompetence/bad decisions/don’t like the changes’.

Some population groups who are more likely to disagree with key government attributes

Quality service

Community-focused

Future-focused

Trustworthy

Fair

Accountable

Honest/ethical

Empathetic/understanding



ATSI



Self-employed



Male



Self-employed



Non-CALD



Male



Non-CALD



Self-employed



ATSI



Regional



Non-CALD



Non-CALD



Self-employed



Non-CALD



Self-employed



Non-CALD

Population groups which over-index on 'disagreement' per statement



Looking only at awareness, **citizens don't necessarily know they are engaging with the Government when they are** – this has an impact on how citizens navigate the service system, set expectations and positively engage with Government.



There is high awareness for most of the NSW Government brands included in the survey. For the majority of brands, more than half of residents are aware of them.

It should be noted that awareness was tested for each brand's logo, rather than for the name of the brand. This explains why awareness of Sydney Opera House, for example, is fairly low.

Attribution, however, is more varied. For each brand, typically around three-quarters to four-fifths of residents correctly attributed them to the NSW Government. While this is again high, it means that in many cases 20% or more of residents do not realise when they are interacting with the NSW Government.

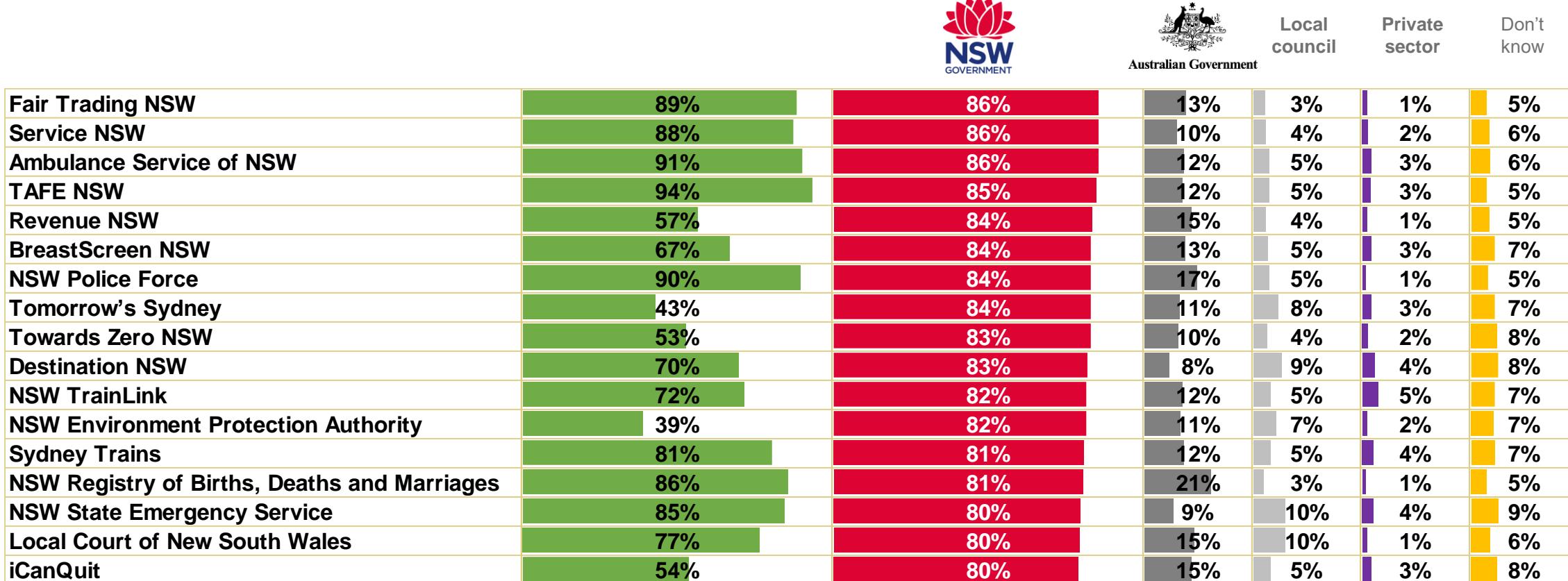
In particular, it is worth noting that correct attribution is below three-quarters for major roads, public schools and public hospitals. This points to a lack of somewhat common lack of understanding of the tiers of government and the remit of each in general.

Awareness of each brand, and attribution based on logo – brands with 80% or above attribution to the NSW Government

Awareness (of logo)



Attribution to...*



Source: A3. As far as you are aware, who is involved in running... Please select any that you think are involved.

Base: n=2006

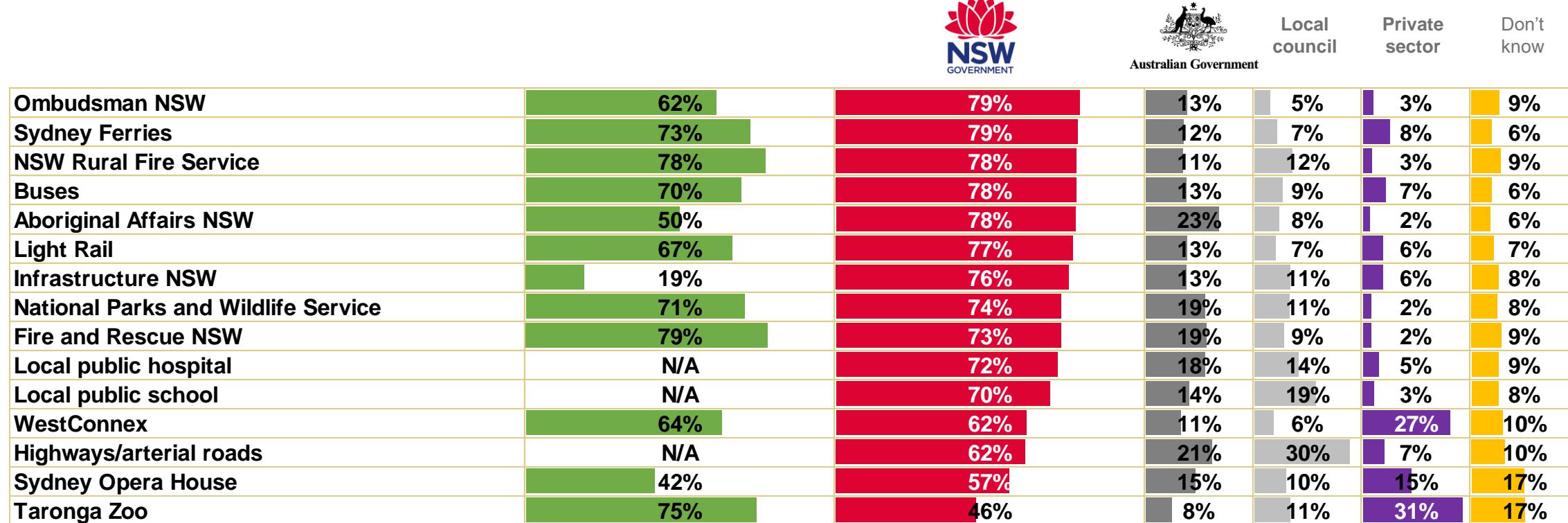
*Attribution is asked of those who were aware of the brand)

Awareness of each brand, and attribution based on logo – brands with below 80% attribution to the NSW Government

Awareness (of logo)



Attribution to...*



Source: A3. As far as you are aware, who is involved in running... Please select any that you think are involved.

Base: n=2006

*Attribution is asked of those who were aware of the brand)

A quick summary

Equity in the Waratah is strong and it is clear that the vast majority of NSW residents are familiar with it, and understand that it represents the NSW Government.

While service engagements play a role in negative perceptions, we see the influence of negative heuristics about ‘the government’ having an impact.

This reflects findings from the qualitative consultations, and is potentially one area where efforts could be made to address any misconceptions or confusion about the split between departmental services, State or Federal services/governance or parliamentary oversight.

As this is the first time the meaning of the Waratah has been measured, *the quantitative results need to be considered as a benchmark* – providing a baseline from which change in performance and metrics can be tracked.

Three key considerations

1. The transactional strength/association of the brand is clear. When citizens think about the Waratah in the context of ‘transactions’ they have had, results skew toward the positive end of the scale. This was observed in the qualitative consultations and while it is a positive, we know that the Waratah can and should be deployed in other Government interactions (Territories) to smooth service interaction, confirm governance/standards expectations and reduce complexity.
2. There are some subgroup populations where additional focus and attention may be required. These groups skew toward the negative and further investigation to understand why these skews are present will be required (is it driven by experience, heuristics about government, issues with access, the general punitive nature of engagement, etc.?).
3. Citizens are engaging with the Government when they may not know they are. This has implications for the ability for citizens to navigate the service landscape smoothly and for them to set expectations of service/support interactions which are consistent with the government standards.

A long-exposure photograph taken at night. In the foreground, bright orange and yellow light trails form concentric circles and arcs, resembling the sparks from steel wool. Behind them, a dark bridge with a metal railing spans across a body of water. The background shows a distant shoreline with city lights and a dark sky with stars.

**The Waratah in the minds
of citizens**

Brand – how it works and what it means

To better understand the Waratah in the minds of citizens (as knowing this will help the NSW Government better use the Waratah to improve service navigation and expectations), a process of brand attribution was carried out. All respondents were asked to review a series of images which provided a representation of what traits the Waratah could possess.

The images are standardised to represent the complete range of personality archetypes found in the community – they allow respondents in the survey to put a personality to the brand and, when this is done 2,000+ times, we are able to build a profile of what the Waratah looks like in isolation, and what it looks like when compared to other Government brands which operate in NSW.

The brand personality is then shown according to six different personality types. The types – shown on the right – are all represented by a different colour throughout this report, for simplicity. The naming here represents how the Waratah is thought about by citizens – from competence through to a brand which is energetic.

When we view the proportion that selected each image, we can see how citizens view the Waratah (i.e. what it adds/how it could help) across different types of interactions (Territories).

Competence

Authority

Warmth

Caring

Fun/freedom

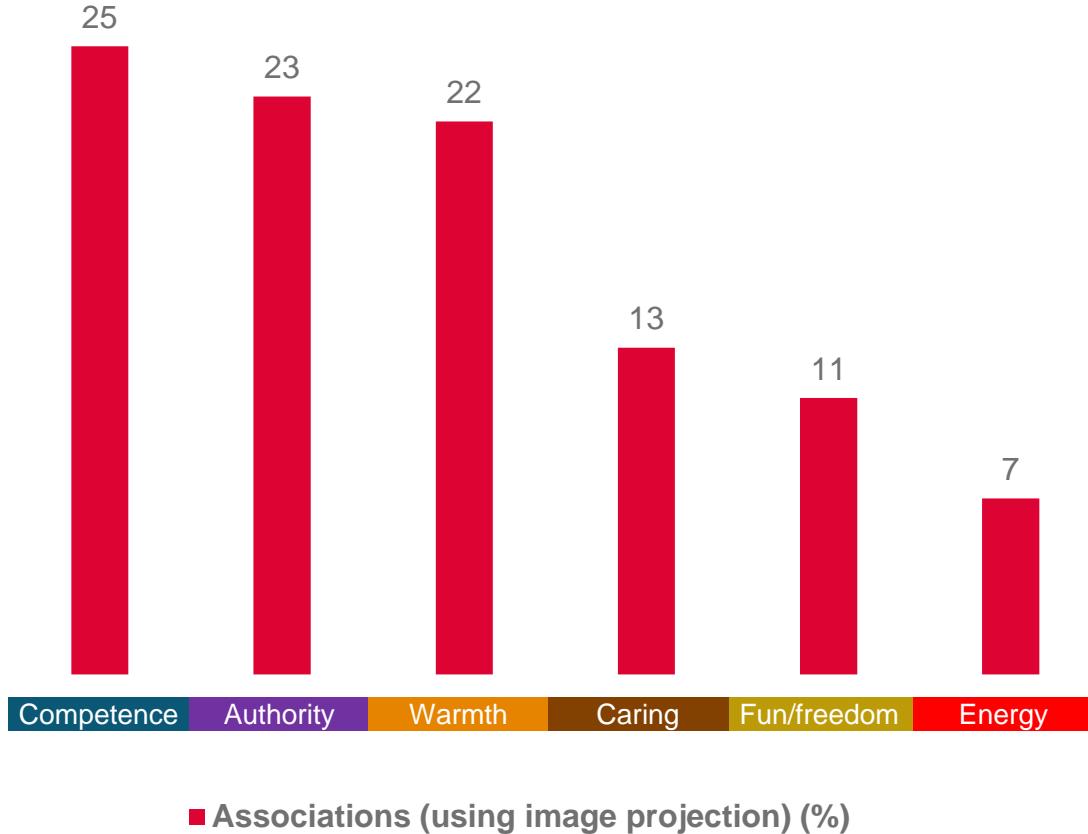
Energy

Masterbrand (the Waratah)

- The Waratah is serious:
 - It is POWERFUL.
 - It is COMPOSED.
 - It is INTELLIGENT.
 - It is DISCERNING.
 - It is FORCEFUL.
- It under-indexes on extroverted qualities; the Waratah is more about authority than it is about caring, fun or energy.
- There is very little association with concepts such as DARING or ENERGETIC – these are sometimes proxies for ‘innovative’ or ‘creative’ and the results here reflect what was heard in discussions with the community.
- WARMTH also emerges – a GENUINNESS which was seen and heard during the qualitative discussions.

In many ways, *the results are broadly consistent with the qualitative consultations* – the meaning of the Waratah for NSW residents is anchored within a sense of seriousness and authority. This is not surprising; given the role that Government services and assistance plays in residents’ lives and the oversight or control-based responsibilities that the Government is required to play.





Attributes (larger is more commonly selected)

Included, a part of things
Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; D4. How would they look to other people when they use or interact with **services that have this logo**?; D5. How would they **feel** when they use or interact with **services that have this logo**?

The Waratah with and without ‘NSW Government’ text



During the qualitative stage, it was noted that there was some difference of view for the Waratah depending on whether or not it had the specific ‘NSW Government’ text included in the design. While there are no plans to alter the design, to gain an understanding of what the text adds/detracts from the Waratah (as some agencies currently use a stylised Waratah without the callout), the sample was split by which version they were shown. This allowed for comparison of the two from a brand perspective.



What we see is that there is *very little difference between the different Waratah variations* – although without the text, the Waratah shifts marginally toward being seen as less decisive/determined/professional and more helpful/friendly/admired; essentially, some of the more authoritative aspects of Waratah are diminished without the callout.

The Waratah – Metro vs Regional

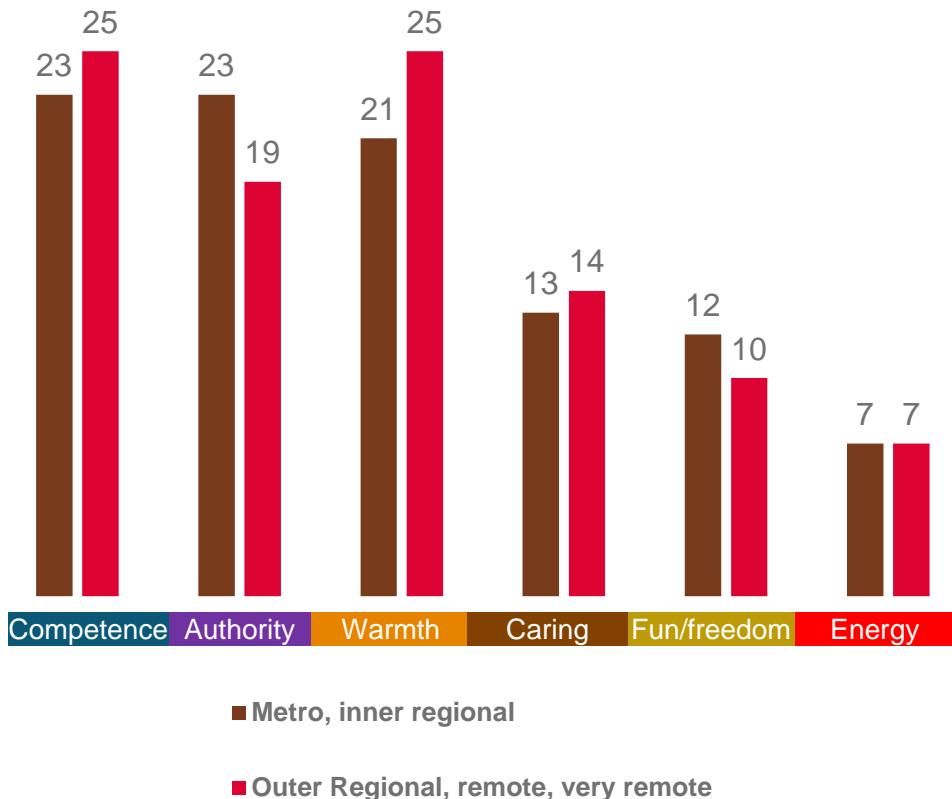
There is also very little difference between associations in metropolitan and regional locations.



However, *in outer regional/remote areas, the brand skews to the softer attributes of thoughtful/understanding, and moves away from the more transactional perceptions*. This aligns with the findings from the qualitative stage. In regional areas, engagement with Government was more often through a face-to-face touchpoint. Connection with Government services was more relationship-based than necessarily transactional.

The Waratah – Metro vs Regional

Associations (using image projection) (%)



Attributes (larger is more commonly selected)



Professional

**Efficient, effective
Informed, in the know
Competent, capable**

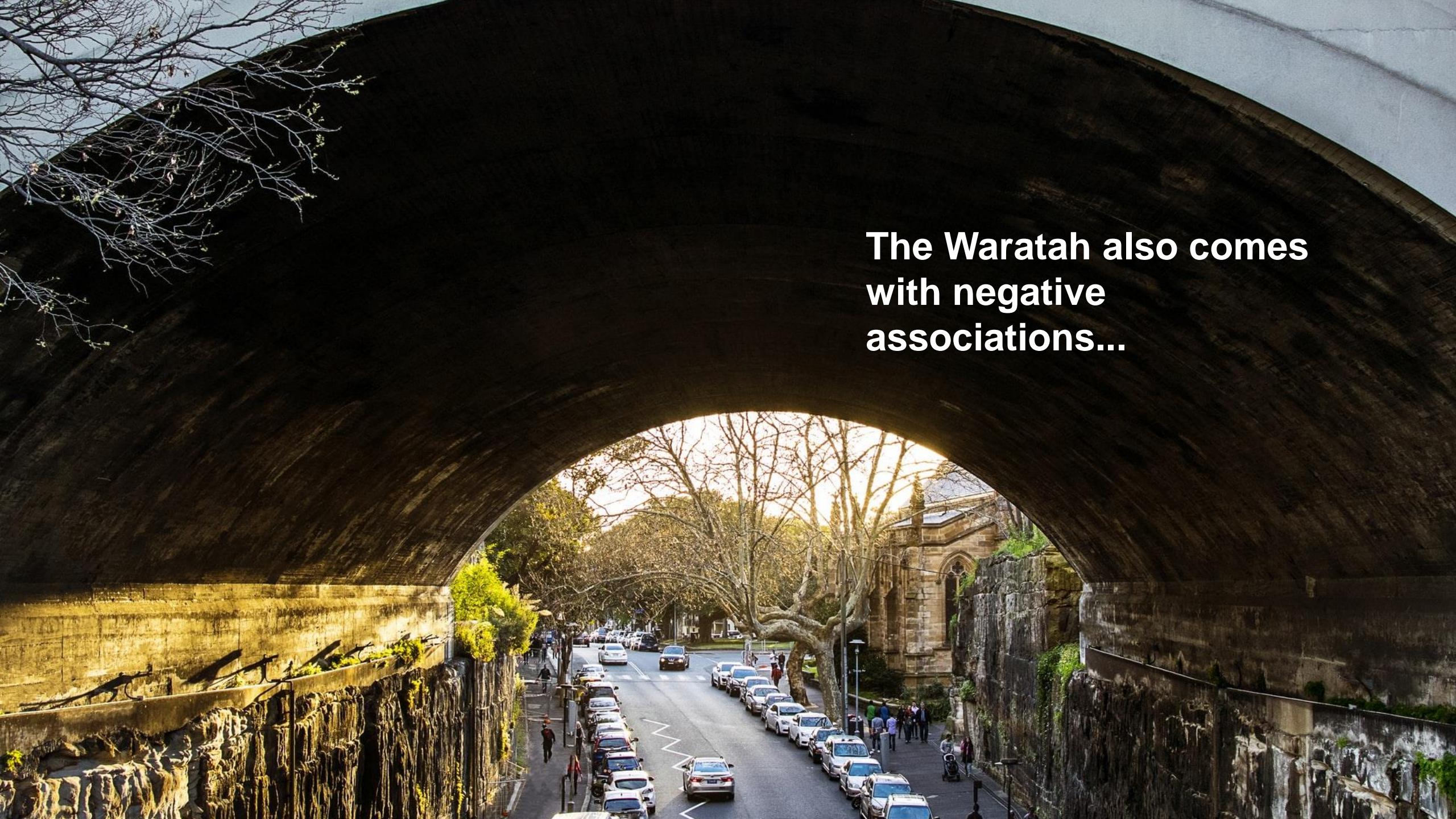
Informative



Thoughtful, understanding

**Professional
Informed, in the know
Competent, capable**

Knowledgeable



**The Waratah also comes
with negative
associations...**

The qualitative stage showed us that positive attributes come with negatives

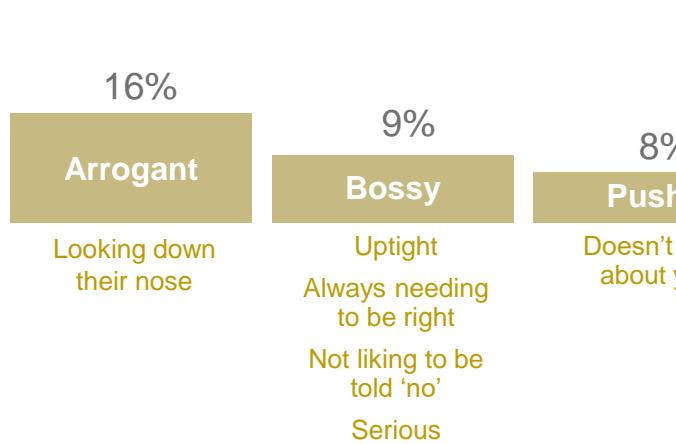
This is what we heard during consultations with NSW citizens about what the Waratah means to them...

Authority-related attributes				Competence-related attributes				
+								
		Important						
Driven	Confident	Strong Stern Not swayed by opinion Protective	Upfront Decisive Gets the job done	Straight to the point Steady Can work under pressure	Intelligent Smart	Diligent Honest	Organised Nice and neat Logical Perfectionist	Fast-paced Hard working
Aspiring	A leader	Direct	Dependable	Knowledgeable	Professional	Functional	Efficient	
-		Arrogant	Bossy	Pushy	Conservative	Complex	Rigid	Busy
Looking down their nose	Uptight Always needing to be right Not liking to be told 'no'	Doesn't care about you	Safe Not trying new things Old-fashioned	Not transparent Not straightforward	Not social Lacking energy	Closed-minded Unable to think outside the box A stickler for the rules Converse on anything	Full on Unable to relax	

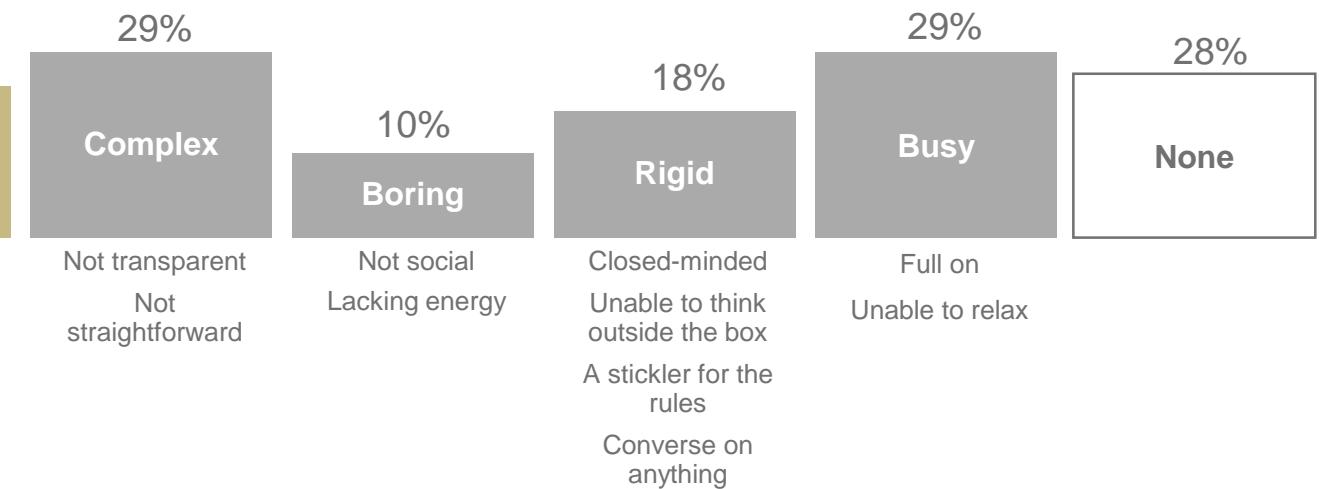
And the quantitative stage allowed us to ‘size’ them

All respondents were asked to indicate if they agreed or disagreed with a range of statements which defined the negative aspects of the brand identified in the qualitative phase. While just over one in five did not attach any negative attributes to the brand, citizens were more likely to cite the range of competence-related attributes as being the negative expression of the brand, as opposed to the authority-related expressions.

Authority-related attributes



Competence-related attributes



That's the Waratah in isolation...

**So...how is the Waratah seen when residents engage with the Government in different ways
(our ‘Territories’ for engagement)?**

During the qualitative consultations, citizens clustered different ways of engaging with the NSW Government into different interaction groups (our Territories)

1 Citizen up

Participants developed their own list of...

Interactions with the NSW Govt.
+
NSW Govt. responsibilities

2 Researcher down

We combined these with our pre-developed list to create a comprehensive set of interactions + responsibilities

3 Co-design

Participants grouped interactions + responsibilities

In a way that “makes sense” to them

4 Finalisation

For each group, participants identified the common need

What do they need from Govt. that's consistent across all of those interactions + responsibilities?

The Territories (ways citizens group different Government interactions)

Territory	Aggregated expression of need (from qualitative research)
Need to deal with the NSW Govt. (administration)	 Ticking things off my 'to do list' and resolving problems, as quickly and easily as possible
Need to get around	 Getting to my work, leisure, services – and everything else – quickly and easily
Want leisure	 Enjoying myself, and having everything I need available at events and activities
Need personal safety	 Feeling safe and in good hands
Need/want education	 Myself and my children being prepared, through quality of education/training and opportunities
Need health/community services	 Being able to get or stay healthy; being able to access treatment, in good hands; taking care of the vulnerable in the community
Maintenance of society	 Regulating society, keeping people safe and upholding society's values
Future planning	 Managing and improving the economy, infrastructure and other aspects of society in the future

'Mapping' the Territories



As with the Waratah, participants selected associations and attributes for a range of NSW Government brands. The results were then aggregated by the Territory where each brand sits, as determined from the qualitative stage (for example, Service NSW sits within the 'Need to deal with the NSW Government' Territory/interaction type). These results are shown and explained on subsequent pages. The brands included in each Territory are also shown.

The brands selected for the survey were those understood to have reasonably high awareness and familiarity, in order for participants to provide informed responses.

We are mindful that there is an extremely wide array of not only brands, but also programs and other activities that either are or could be branded with the Waratah. The aggregations provided in this report, and the brands that have been included within them, are intended to represent the Territories as a whole. They are, however, indicative only – in the sense that all brands, programs and activities will naturally vary in terms of associations and attributes.

The intention of these aggregations is to allow any brand, program or activity – existing or new – to be assigned to a Territory. As a starting point, it is safe to assume that the associations and attributes for a brand approximately match those for the Territory to which it is assigned. This assumption can guide action taken in relation to it; although it is important to note that action guided in this way will obviously not be informed as rigorously as it would be if the brand were to be tested individually.

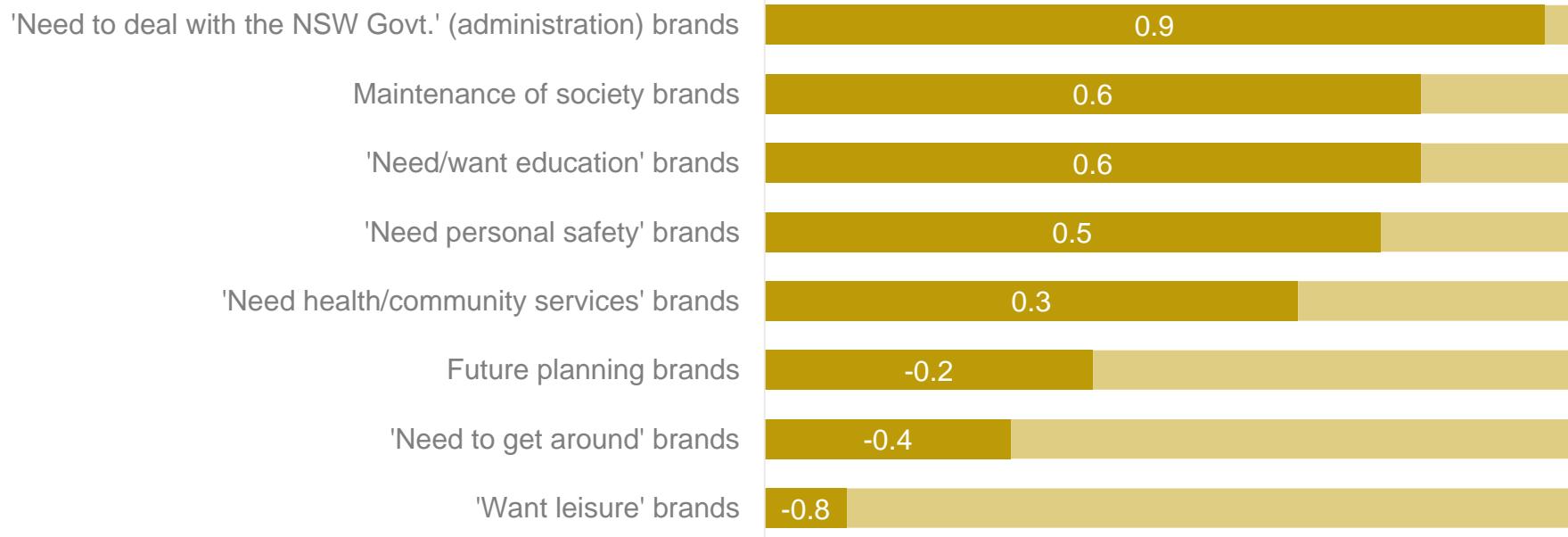
Some Territories have similar associations to the Waratah's; others are very different

The chart below shows the level of correlation between the Waratah and each Territory by associations.

Where operating brands have similar associations to the Waratah, greater efforts to drive association with the Waratah would benefit both operating brands and the Waratah. For other brands, there are opportunities to leverage both what the Waratah could bring to the brand, and what the brand could bring to the Waratah. This comes down to a question of desired strategy – where we need to understand what the impacts of appearing in that space may be.

Each Territory is detailed on the following pages.

Correlation with Waratah's associations, where 1.0 is identical





'Need to deal with NSW Govt.' (administration) brands



Registry of Births
Deaths & Marriages



Revenue



What does this Territory represent?

Associations with administration brands are similar to the Waratah overall, as are attributes – with an enhanced focus on ‘informed’, reflecting the transactional nature of dealing with the Government in this Territory.

Service NSW, as a standalone brand, has a slightly different set of associations to the Waratah. It is seen as more helpful, friendly, supportive and easy to deal with – attributes which ‘soften’ the more aloof, professional Waratah and anchor it to be more customer-centric.

Service NSW does not have some of the professionalism and connectedness that the Waratah is seen to possess – this is what it trades off for the strengthened customer elements.

What is the opportunity?

We recognise that Service NSW currently has a stylised Waratah included as a signpost for citizens, **however there may be opportunity to strengthen this alignment to make the association clearer and more readily understood**; this is a strategic decision and needs to be informed by broader brand planning and customer insights.

In general, other brands in this Territory are co-branded already.





'Need to deal with NSW Govt.' (administration) brands



Registry of Births
Deaths & Marriages



Revenue



Associations (using image projection) (%)



Attributes (larger is more commonly selected)

'Need to deal with NSW Govt.' brands

Knowledgeable
Informative
Efficient, effective
Informed, in the know
Competent, capable
Professional
Precise, methodical



Included, a part of things
Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative



Maintenance of society brands



What does this Territory represent?

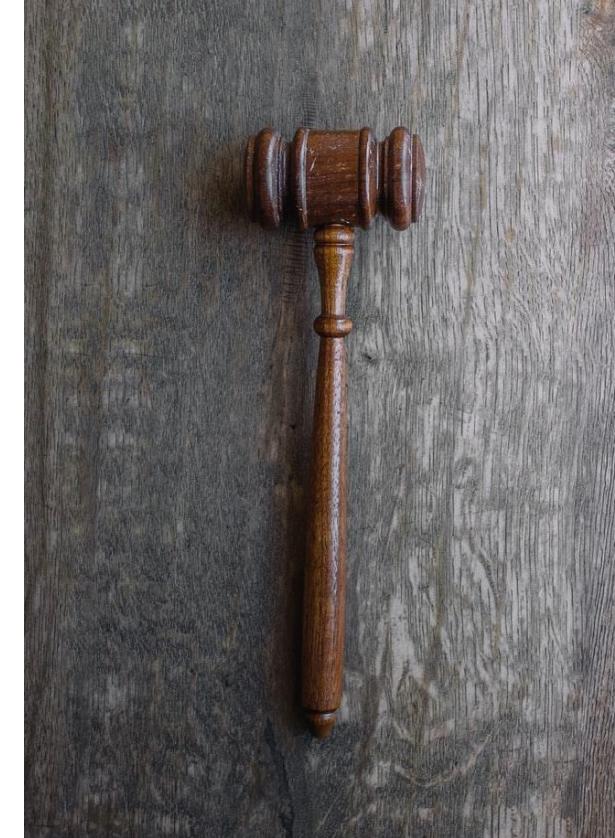
As with the Waratah, brands within this Territory demonstrate a range of aspects including competence, capability, efficiency and professionalism – all key requirements for confidence in government service provision (as voiced during the qualitative consultations).

Operating brands in this Territory vary from the Waratah in that they possess decisiveness, caution and social responsibility to a greater extent.

What is the opportunity?

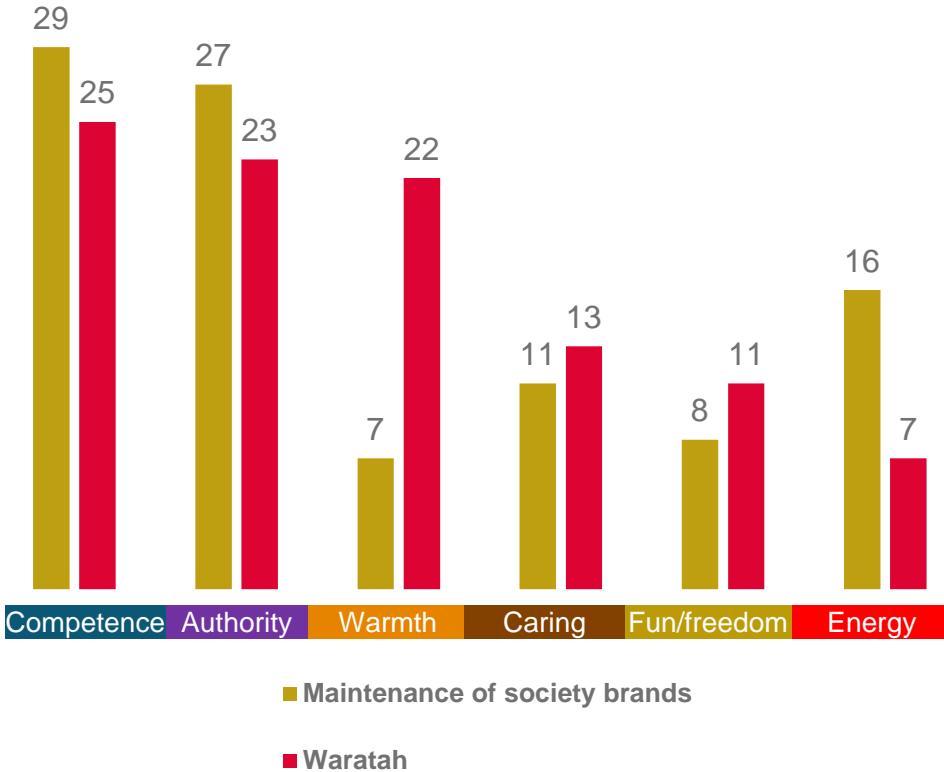
Findings reinforce opportunities for the Waratah to have a stronger presence for citizens when they interact with the Government in this way.

All operating brands in this Territory show opportunities for strengthening the relationship between the Waratah and themselves – this is particularly the case for the NSW Ombudsman, EPA and Law Court of NSW, which were not co-branded in the research.





Associations (using image projection) (%)



Attributes (larger is more commonly selected)

Maintenance of society brands

Precise, methodical
Informed, in the know
Decisive, determined
Professional
Powerful, superior

Socially, responsible
Efficient, effective
Knowledgeable



Included, a part of things
Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, maintenance of society n=1858



What does this Territory represent?

It is important to note that there is variance between TAFE NSW and local public schools – they have limited common associations with one another:

- **TAFE NSW** skews more toward associations with accomplishment and ambition. The brand is less present in expressions related to efficiency and professionalism.
- **Schools** lean toward the more 'easy-going' and 'warm' to a greater degree than other brands. There is a clear community focus here that translates into perceptions of schools being 'helpful' and 'friendly'.

Both are present in the zones that represent competence and knowledge, although clearly not to the same extent as the Waratah.

What is the opportunity?

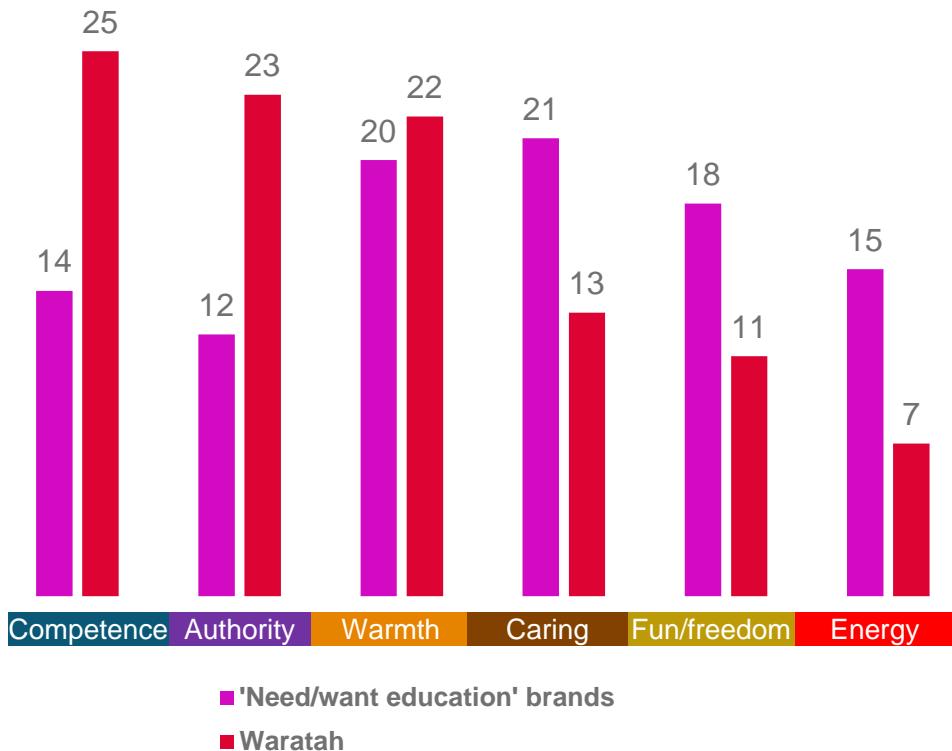
Based on the analysis, there is evidence to suggest that utilisation of the Waratah in a more consistent manner for the TAFE NSW brand would be of benefit and allow citizens to better engage with Government services from an informed perspective.

From the qualitative consultations, we know that the Waratah may not be suitable for use in public schools, simply as it does not 'fit' in this context. This is an area that may require further investigation.





Associations (using image projection) (%)



Attributes (larger is more commonly selected)

'Need/want education' brands

Helpful, friendly
Ambitious, driven
Knowledgeable
Included, a part of things
Accomplished, admired
Competent, capable
Informed, in the know



Included, a part of things
Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, NSW TAFE n=928



'Need personal safety' brands



What does this Territory represent?

Along with a strong sense of energy, brands in this space are seen as possessing qualities associated with their core role in society (e.g. safety and protection) as well as social connectedness, trust and community focus.

As a group, NSW Rural Fire Service, NSW Police and NSW Ambulance vary from Fire + Rescue NSW and the State Emergency Service (SES). Fire + Rescue NSW is more commonly associated with energy and action than other brands; it is less overtly community-focused than NSW Rural Fire Service, and than the Waratah. SES is the most caring and freedom-focused – and represents friendliness. Strategically, we know from the qualitative consultations that NSW Rural Fire Service, NSW Police and NSW Ambulance carry a strong equity on their own. They are seen as somewhat distinct and separate services from the more transactional engagement with 'government'.

What is the opportunity?

Enhanced Waratah presence may benefit Fire + Rescue and SES to the greatest degree – through association with 'government' and the strengths associated with power and force. For SES in particular, the Waratah could speak to efficiency and functionality through ability to organise resources, and therefore better meet the need for feeling safe and in good hands determined in the qualitative consultations. We cannot say that operating brands in this Territory do not have these competence/power qualities in citizens' minds already; it is just that the other characteristics already mentioned are more prominent. Existing data may shed further light on this.

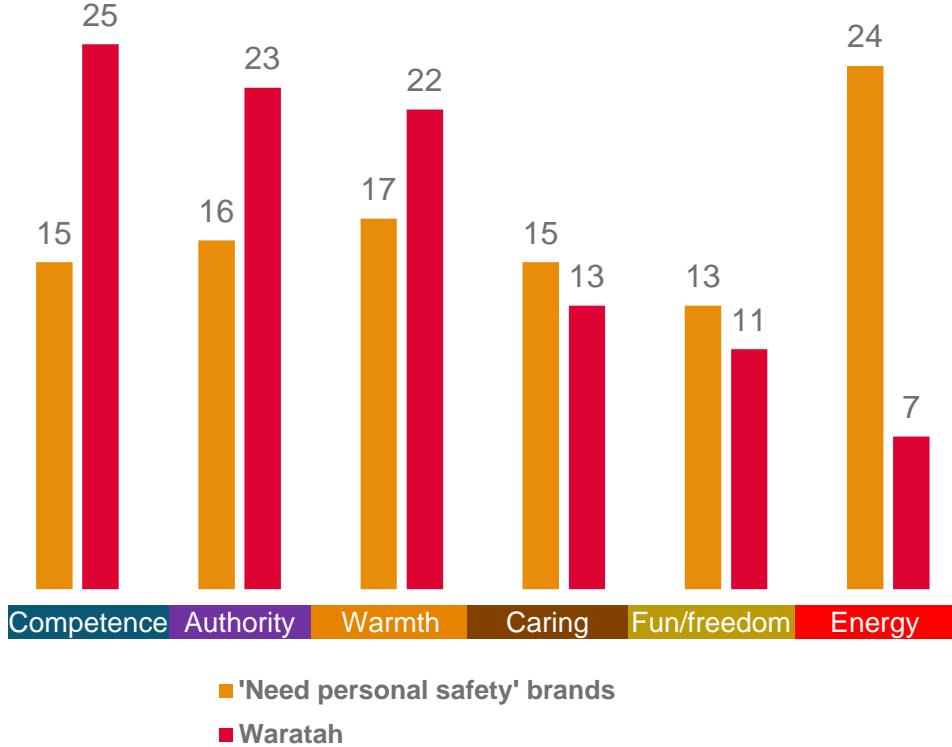




'Need personal safety' brands



Associations (using image projection) (%)



Attributes (larger is more commonly selected)

'Need personal safety' brands

Close, supported
Community-minded
Helpful, supportive
Safe, protected
Trusted, good reputation
Helpful, friendly



Included, a part of things
Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, need personal safety n=1089



'Need health/community services' brands



Aboriginal
Affairs



BreastScreen
NSW



iCanQuit

'Local Hospital'

What does this Territory represent?

Operating brands in this space are seen as possessing qualities associated with their core role in society (helpfulness and support) coupled with a safety, support and care. 'Caring' is the most common association, and dominates the attributes assigned to this Territory.

Several brands within this Territory are already strongly co-branded. Shared associations with warmth demonstrate legitimacy in this space.

What is the opportunity?

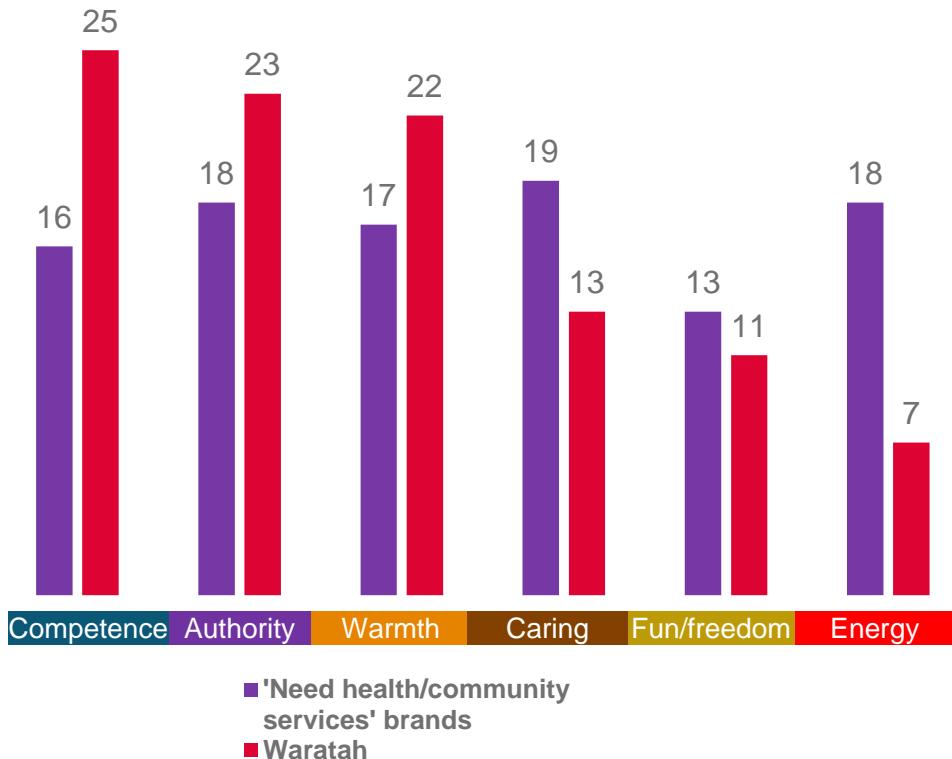
There may be some opportunity for strategic change, to strengthen the presence of the Waratah for local public hospitals – and this reflects commentary from the consultations with citizens. The Waratah's sense of competence could enhance perceptions of safety and care.

We know from the qualitative consultations that there is very positive sentiment toward hospital employees; these employees help them to meet their need: being 'in good hands'. The Waratah could speak to efficiency and functionality through its ability to organise these resources.





Associations (using image projection) (%)



Attributes (larger is more commonly selected)

'Need health/community services' brands

Warm, welcoming
Safe, protected
Helpful, supportive
Thoughtful, understanding
Close, supported
Helpful, friendly



Included, a part of things

Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, need health/community services n=1811



What does this Territory represent?

Future planning brands represent forward movement, energy and advancement.

Brands here vary by the extent to which they convey the energetic and ambitious qualities, with Tomorrow's Sydney sitting at the higher end of this scale.

What is the opportunity?

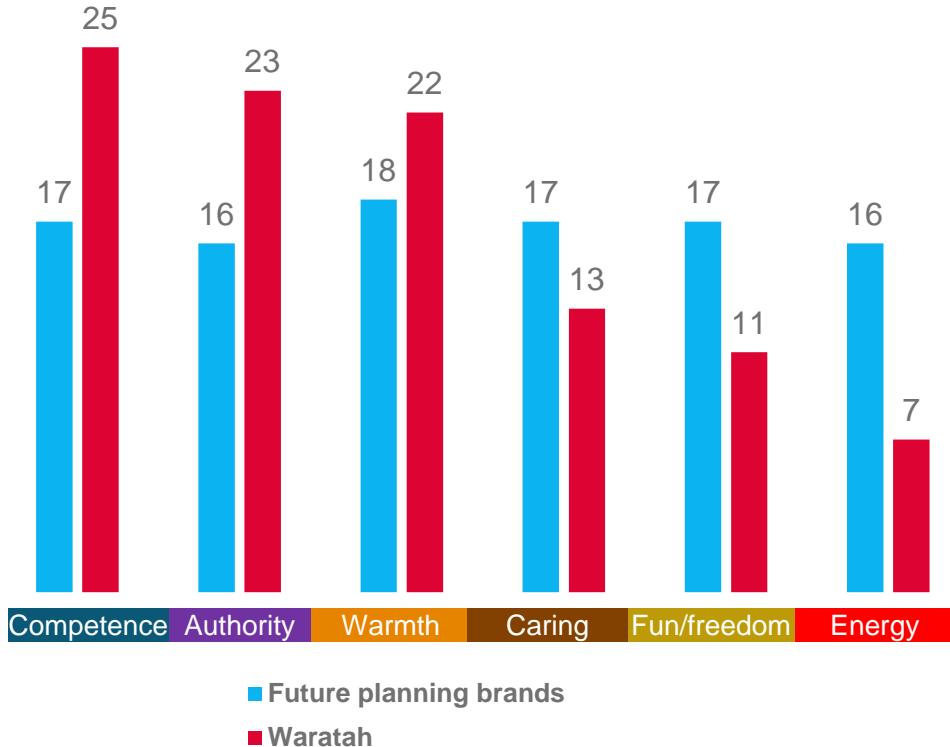
Increasing the presence of the Waratah in this Territory could enhance competence-related perceptions for operating brands and remind citizens in NSW about the Government investment in innovation in their state.

It is worth noting that the Waratah is not immediately associated with ambition and innovation. In the qualitative consultations; they were not top-of-mind for citizens at the moment when they consider the Waratah (and, by proxy, the NSW Government as a whole).





Associations (using image projection) (%)



Attributes (larger is more commonly selected)

Future planning
brands

Informed, in the know
Ambitious, driven
Community-minded
Informative
Innovative
Included, a part of things
Lively, outgoing
Empowering



Included, a part of things

Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, future planning n=486



'Need to get around' brands



'Highways or Arterial Roads'

What does this Territory represent?

Transport has relatively strong associations with freedom (i.e. flexibility), with these associations being the strongest for more 'leisure-focused' brands (e.g. Sydney Ferries and Light Rail).

What is the opportunity?

Increasing the Waratah's presence during transport interactions may benefit Transport brands by lending the Waratah's sense of competence; expertise, professionalism and depth of understanding.

Expertise, professionalism and depth of understanding can lead to simplicity, predictability, reliability and efficiency. It will also assist in setting service expectations and increasing citizens understanding of the link between transport provision and the NSW Government (allowing clearer service expectations to be set and governance processes to be understood).

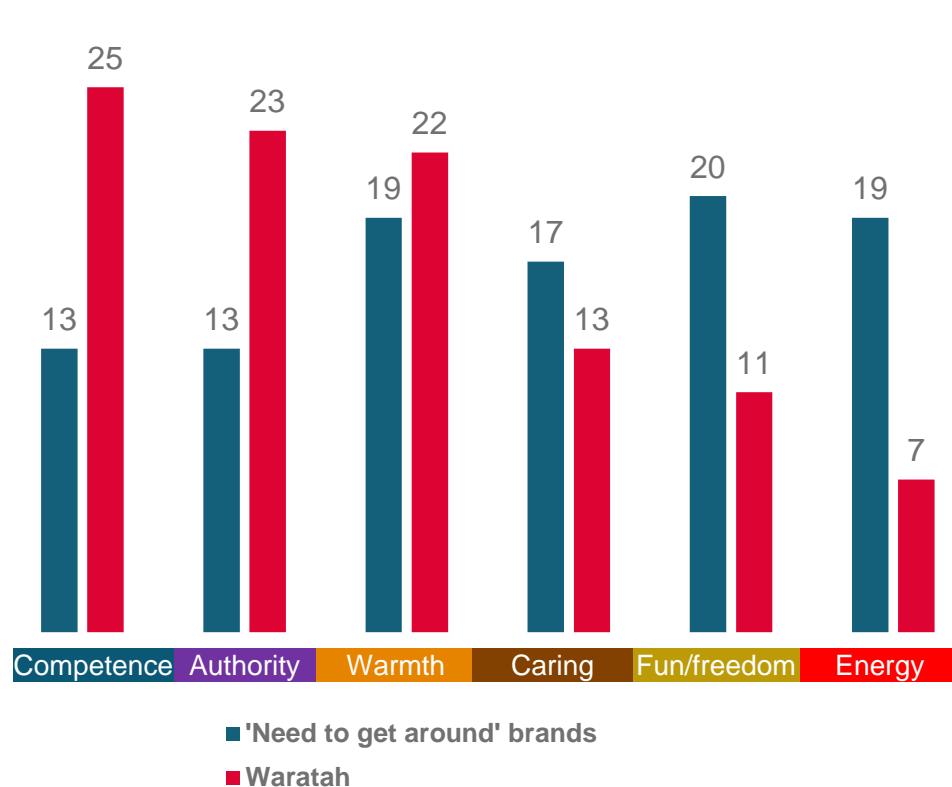




'Need to get around' brands



'Highways or Arterial Roads'



Attributes (larger is more commonly selected)

'Need to get around' brands

Efficient, effective
Casual, laidback
Easy to deal with
Free, uninhibited
Competent, capable



Included, a part of things

Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, need to get around n=1872



What does this Territory represent?

Brands in the Leisure Territory are seen as highly energetic, warm/welcoming and adventurous/daring – aspects which are not seen to be core to the Waratah.

What is the opportunity?

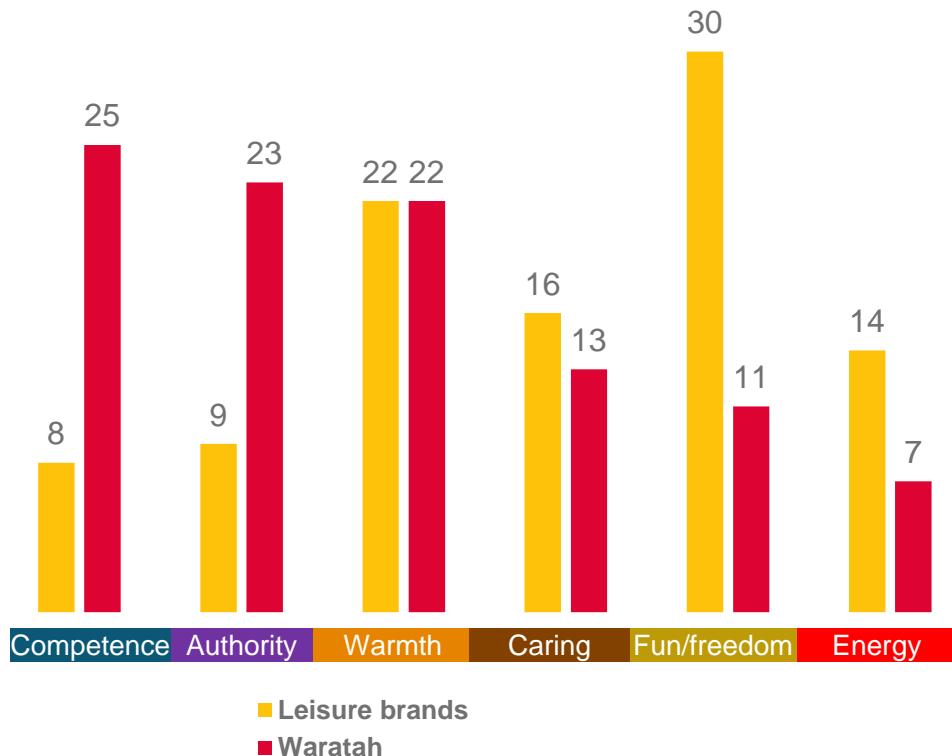
While again potentially offering signposting and a sense of competence and authority, the Waratah lacks energy or a sense of adventure. The qualitative consultations suggest that, if used now in this Territory, the Waratah may take away from these associations.

Increasing the presence of the Waratah during these interactions may be a second order priority – something to be reviewed and considered after other priority areas for enhanced presence are activated.





Associations (using image projection) (%)



Attributes (larger is more commonly selected)

Leisure Brands

Warm, welcoming
Carefree, fun-loving
Excited, inspired
Easy to deal with
Socially responsible
Cheerful, happy
Free, uninhibited
Lively, outgoing
Adventurous, daring
Active, energetic
Energised, stimulated



Included, a part of things

Efficient, effective
Professional
Competent, capable
Informed, in the know
Informative

Source: B2a/D2. Thinking about this logo, which of these groups of people would MOST prefer to use or interact with **services that have this logo**? Pick one group of people only; C1/D3. Now please think a bit more about these people who would MOST prefer to use or interact with **services that have this logo**. Which of these words would these people use to describe these services?; C2/D4. How would they look to other people when they use or interact with **services that have this logo**?; C3/D5. How would they feel when they use or interact with **services that have this logo**?

Base: Those who saw the Waratah with text n=1601, want leisure n=1691

Wrap-up

Finding

For some brands and for some ways of interacting with the Government, **citizens are not aware of the role the Government plays.**

Implication

This provides a **base-case for increasing the presence of the Waratah across brands and interaction types to improve citizen experience and confidence.**

The **Waratah is a powerful and well-loved symbol** of the NSW Government – it has clear equity and provides a sense of confidence and connectedness.

Some Territories (ways of engaging with Government) are more suitable for the Waratah – while it could be present at any point, **it does not necessarily have a natural fit at all points, all the time.**

This means **the Waratah has something to offer other NSW brands** – it brings with it clear qualities which may enhance citizen expectations in, and confidence of, service or support engagement.

This means **priority areas based on an assessment of benefit and strategic value need to be made**, informed by the evidence presented in this report.