

Landonline customer research 2011
Quantitative survey findings

Land Information New Zealand
July 2011

A graphic consisting of three overlapping diamonds. The top-left diamond is red, the bottom-right diamond is a darker red, and the bottom-left diamond is a light tan color.

research
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Background: Property rights

As a Government agency, one of LINZ's key requirements is to **build and maintain confidence in property rights in land and geographic information** in New Zealand.

Buying property is one of the biggest investments New Zealanders make. It is important the framework for doing so is clear and that the system works well. Because land is a fundamental asset, a system that provides people and businesses with secure property rights is a prerequisite for a prosperous, sustainable economy.

In building and maintaining certainty of property rights, LINZ's aim is to ensure people know what their land property rights are, where they are (e.g. the boundaries of their properties) and how their properties are valued for rating purposes. In turn, this provides confidence that property rights are clear and certain and property can be bought, sold or traded efficiently.



Background: Landonline

Landonline is the electronic register, or database, of New Zealand survey and land title information. Registered users conduct secure land transactions in real time, over the internet. Landonline is not designed for public access or use, but for land professionals such as surveyors and lawyers. Transactions can only be conducted by registered, authenticated users, which ensures the integrity of the survey and titles register is maintained.

Over the past decade, LINZ has automated Landonline while limiting the compliance cost on business as far as possible. The result is that the land transaction services LINZ delivers perform in the top three among OECD countries.

Satisfaction with Landonline customers was last measured in mid-2009, four months after the electronic lodgement of all land title transactions had become a mandatory requirement in New Zealand.



Research objectives and method

- ◆ LINZ commissioned Research New Zealand, an independent research company, to provide:
 - ◆ an up to date measure of the satisfaction of its Landonline customers
 - ◆ an indication of how successfully the organisation is achieving certainty of property rights among its Landonline customers:
 - ◆ an indication of whether the stated automation benefits of Landonline are being realised

- ◆ An online survey was conducted in May and June 2011 among current registered users of Landonline
 - ◆ The survey questionnaire contained many standard questions, asked of all respondents and enabling overall measures of customer opinion, along with questions which were targeted at the individual Landonline functions used by different types of customers
 - ◆ While the 2011 research focuses predominantly on the Landonline service (in contrast to the 2009 survey which covered “LINZ products and services” for survey and title customers), some key measures from the 2009 research have been maintained to enable trend analysis.



Research method and response



- ◆ 2,526 Landonline customers responded to the 2011 survey: a response rate of 25%
 - ◆ A sample of customers provided by LINZ was sent email invitations to participate in the survey
 - ◆ Response rates varied between 20% and 29% across the different customer groups
 - ◆ The average survey duration was 16 minutes
- ◆ Results have been weighted to reflect the true distribution of LINZ customers by licence types, as shown in Table 1
 - ◆ “Conveyancers” refers to customers who hold an e-dealing licence
 - ◆ “Surveyors” refers to e-survey licence holders
 - ◆ “Territorial Authorities” refers to local government customers using Landonline’s certification functions
 - ◆ “E-search customers” refers to all Landonline users who only have an e-search licence
- ◆ These customer categories are used in many of the analyses shown in this report
- ◆ Where results are available for 2009 and the result for the total sample is significantly higher or lower in 2011, differences are highlighted next to graphs with arrows:  

Table 1: Response and actual distribution of customers

Type of customer	Unweighted response count	Unweighted distribution	Weighted distribution
Conveyancers	1,562	62%	62%
Surveyors	263	10%	13%
Territorial Authorities	77	3%	3%
E-search customers	624	25%	21%
Total	2,526	100%	100%



Profile of respondents: Conveyancers

Table 2: Job or role of Landonline user – by level of Landonline activity

	Base =	Total	Low activity	Medium activity	High activity
		1353*	344	453	556
		%	%	%	%
Legal Executive		33	16	29	46
Partner/ Director/ Sole Practitioner		24	33	28	15
Secretary or support staff		21	24	17	22
Solicitor		16	20	17	12
Associate		4	5	5	3
Practice Manager		1	2	2	1
Other		1	2	2	1

Table 3: Professional memberships – by level of Landonline activity

	Base =	Total	Low activity	Medium activity	High activity
		1342*	341	449	552
		%	%	%	%
NZ Law Society		54	63	61	43
NZ Institute of Legal Executives		28	15	25	37
Auckland District Law Society		21	30	23	14
NZ Society of Conveyancers		0	1	0	0
Other		1	1	1	1
None		26	24	20	31

- ◆ Overall, one in three e-dealing licence holders (categorised as “conveyancers” in this report) stated that they are employed as a legal executive
 - ◆ Almost half (46%) of users with high volumes of e-dealing activity* are legal executives
- ◆ More than half (54%) of e-dealing licence holders are members of the New Zealand Law Society, with 21% holding membership of the Auckland District Law Society.

* E-dealing customers have been divided into groups according to their estimated annual volume of lodgements (based on data provided by LINZ):

Low activity: up to 45 lodgements
 Medium: 46-110 lodgements
 High:> 110 lodgements



Profile of respondents: Surveyors

Table 4: Job or role of Landonline user

	Base =	Total 140* %
Licensed Cadastral Surveyor		94
Surveyor		2
Survey Technician		1
Administrator/ office manager		1
Other		2
Total		100

Table 5: Professional memberships – by level of Landonline activity

	Base =	Total 140* %	Low activity 40 %	Medium activity 54 %	High activity 46 %
New Zealand Institute of Surveyors		93	90	94	93
Consulting Surveyors Group		33	25	31	41
Institute of Cadastral Surveying		8	0	13	9
Other		4	10	2	2
None		2	2	2	2

- ◆ The vast majority (94%) of e-survey licence holders (categorised as “surveyors” in this report) are employed as licensed cadastral surveyors
- ◆ 93% of e-survey users are members of the New Zealand Institute of Surveyors
- ◆ Membership of the Consulting Surveyors Group is greatest among those with high volumes of e-survey activity*.

* E-survey customers have been divided into groups according to their estimated annual volume of survey lodgements:

Low activity: up to 12 lodgements
Medium: 13-23 lodgements
High:> 23 lodgements



Profile of respondents: E-search customers

Table 6: Main area of business of Landonline user

	Base =	Total 604* %
Territorial authority		21
Search		16
Lending or banking		11
Valuation		11
Central Government department		10
Real Estate		10
Property consultants/technical services		5
Search and registration		4
Property/land development		2
Surveying		2
Lawyer/solicitor		1
Other		5

Table 7: Job or role of Landonline user

	Base =	Total 604* %
Administration		45
Customer facing/servicing		18
Management		15
Research/analysis		13
Other		9

- ◆ One in five e-search customers work for a local government organisation
- ◆ E-search customers who work in the field of valuation tend to conduct medium to high levels of Landonline search activity*
 - ◆ Most other business types include a range of low to high-volume users.

* E-search customers have been divided into groups according to their estimated annual volume of Landonline searches:

Low activity: up to 120 searches
 Medium: 121-320 searches
 High:> 320 searches





Key findings

Landonline customer research 2011

Overall key findings: Landonline customer satisfaction

- ◆ 87% of Landonline customers are satisfied with the service overall: ranging from 91% of conveyancers, the most satisfied customer group, to 67% of surveyors
 - ◆ As observed in 2009, conveyancers and e-search customers are significantly more satisfied with the Landonline service than TA certification customers and surveyors
- ◆ However, only one in four users “strongly agree” that Landonline has improved LINZ’s overall product and service offering, suggesting that – despite the overall efficiency gains the service has introduced compared to the paper-based system – there is an expectation for constant improvement
- ◆ Using Landonline brings complexities for many users, who frequently require support:
 - ◆ For many new users there is a period of learning and a feeling that the interface itself is not easy to use – which can lead to lower overall satisfaction with the service. A reliable support experience can influence satisfaction however
 - ◆ For more experienced users, the interface is simple enough to use – until they are faced with a complex transaction, which means they will need support from LINZ. Generally, those with five or more years of experience with Landonline are a more satisfied group, but the quality of support that they receive is a key factor in determining their overall satisfaction. Many of these customers have had an unsatisfactory experience with customer support services
- ◆ A Landonline fee increase, announced prior to the commencement of this customer survey, is likely to have influenced customer views about their ability to maintain or reduce fees to clients: the survey found that a minority of customers agree that they are able to do this
- ◆ Cost concerns have a less significant impact on overall satisfaction than the sentiment that Landonline is helping businesses to be efficient and effective, or to maintain a high level of service to their clients.



Overall key findings: automation benefits

- ◆ Overall, more than three quarters (79%) of customers agree that Landonline is more efficient than the paper system
- ◆ Despite agreement on the overall efficiency improvement, less than a third of customers (28%) agree that Landonline has reduced the cost of doing business – a finding which is observed across all customer groups
- ◆ Opinions about the reductions in staff time brought about by Landonline vary significantly within, and between different groups of customers
 - ◆ 40% of surveyors disagree that Landonline “has reduced the time staff spend on administrative functions”, and 32% disagree that Landonline “requires fewer staff to process a survey”. These issues are also mentioned most frequently as the main reasons for surveyors’ overall dissatisfaction with Landonline
 - ◆ Some conveyancers share this view – at least one in four disagree that Landonline has brought staff time reductions, and again this is highlighted by many as the main reason for overall dissatisfaction with the service
- ◆ Ease of use is a problem for many customers, particularly for complex transactions
 - ◆ Less than half of customers (42%) agree that surveys, certifications or complex registrations can be carried out easily using Landonline
 - ◆ For surveyors and conveyancers, this can be one of the main contributors to overall dissatisfaction
- ◆ Support services and expert help are still widely needed despite automation
 - ◆ Nine out of ten Landonline customers (91%) have used the 0800 helpdesk in the past 12 months
 - ◆ 77% of these customers are satisfied with the quality of support they have received.



Overall key findings: confidence in land information and property rights

- ◆ The security benefits of Landonline are not widely appreciated
 - ◆ Many customers admit that they “don’t know” about the likelihood of fraud or loss of documents with Landonline
 - ◆ Less than half (49%) agree that “the chances of fraud are unlikely using Landonline”, and 12% disagree that this is the case
 - ◆ 72% agree that the loss of lodgement documents is unlikely using Landonline, with few disagreeing (3%)
- ◆ Serious legibility concerns are raised by surveyors
 - ◆ 53% of surveyors disagree that “Landonline has improved the legibility of documents and plans”, suggesting that legibility has deteriorated, rather than improved
 - ◆ At least 10% of customers in each of the other customer groups also disagree with this statement
- ◆ Integrity of data is also an issue for some
 - ◆ Overall, 57% of customers agree that “Landonline has improved the integrity of land data, including a record of changes over time” – compared to 9% who disagree
 - ◆ Among surveyors, views are more polarised: 42% agree that this is the case, compared to 22% who disagree
 - ◆ The issue of data quality was raised by some surveyors as a reason for overall dissatisfaction with Landonline, and also a an area for potential future improvement.



Snapshot of main customer groups

Conveyancers

- ◆ A highly engaged and mostly satisfied group (91%), Landonline enables a high level of client service
- ◆ Some concerns about Landonline support, costs, and the ability to prepare complex registrations

Surveyors

- ◆ The least satisfied group overall: two thirds (67%) are satisfied, and 14% are dissatisfied
- ◆ A highly engaged group with frequent interactions with LINZ
- ◆ Many users are yet to observe improvements in day-to-day efficiencies from working with Landonline, and this is a major driver of dissatisfaction
- ◆ Support services could be improved for this group in particular
- ◆ Concerns raised about data quality and the legibility of plans

Territorial Authorities (certification)

- ◆ Mixed experiences with Landonline, but only 5% are dissatisfied with the service
- ◆ Complaints include issues with the functionality of Landonline certification and search functions, and a perceived lack of understanding of their business needs among LINZ staff
- ◆ There is a need for improved relationship management and possibly training

E-search customers

- ◆ A largely satisfied group (89%), in spite of some negative reaction to the recent fee increase
- ◆ New users often struggle with the search function.



Conclusions

- ◆ At a glance, overall satisfaction levels with Landonline customers are relatively high and the general picture appears to be a positive one
- ◆ However, closer examination of survey responses highlights a number of important issues which need to be addressed in order to avoid declining satisfaction in future. The main issues are:
 - ◆ A perception that too much staff time and effort is required to prepare surveys or dealings (which impacts overall views on efficiency, and value for money)
 - ◆ Ease of use of the Landonline system
 - ◆ Many newer (or less active) users struggle with the interface overall and particularly the search function
 - ◆ More advanced users find it difficult to lodge complex registrations, surveys or certifications
 - ◆ Support services are often found to be lacking, especially for pressing and more complex queries
 - ◆ Online information sources can be difficult to navigate
- ◆ In the short term, providing superior support would resolve some of these customer concerns
- ◆ In the longer term, it appears that some system improvements will be required
- ◆ Surveyors and Territorial Authorities should be considered priority groups for LINZ's attention because of their lower overall levels of satisfaction





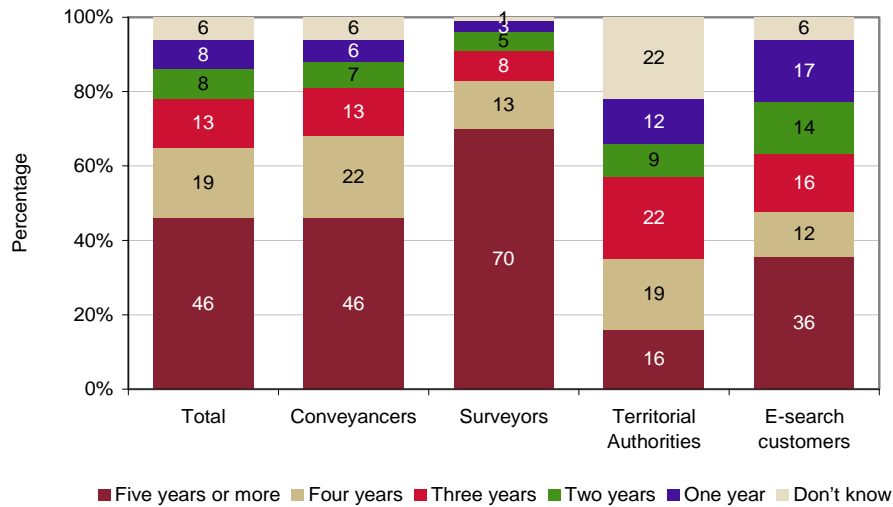
Section 1

The importance of Landonline

Many TA and e-search customers are new to Landonline

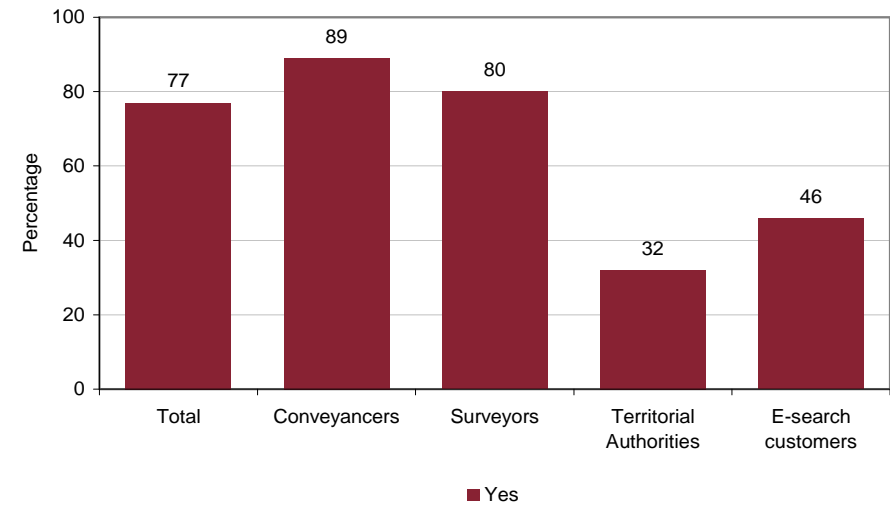
Graph 1: Duration of Landonline use – by customer type

Q7. About how long have you been using Landonline?



Graph 2: Pre-Landonline activity – by customer type

Q5. Prior to the introduction of Landonline, did you complete paper-based title/survey transactions?



- Almost four out of five Landonline customers (78%) have been using the service for three years or more
- In comparison, most TA certification customers and e-search customers have no point of comparison between Landonline and the paper-based survey and title transactions/searches of the past.

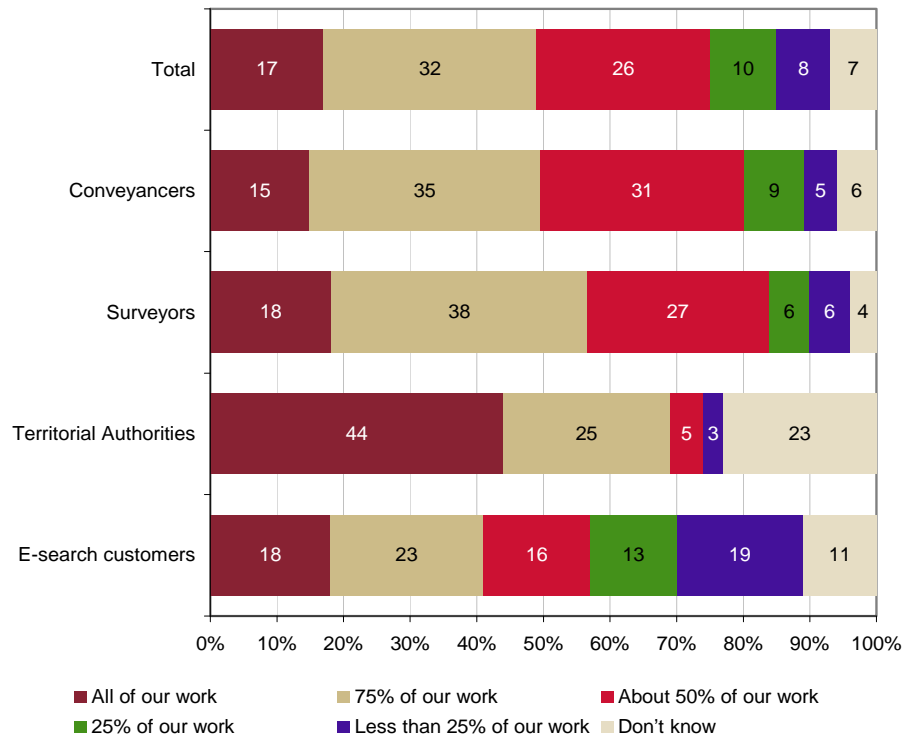
Sample based on all respondents (2526)



Most Landonline customers are highly reliant on the service

Graph 3: Importance of Landonline – by customer type

Q6. How important is Landonline to your business?



- ◆ Three out of four Landonline customers state that 50% or more of their business's work relies on Landonline
- ◆ E-search customers show the greatest variation in perceived reliance on the system
 - ◆ Users working in valuation and real estate organisations state the strongest reliance on Landonline, while those in central and local government express the lowest reliance overall
- ◆ While many TA customers are relatively new to Landonline, overall this group shows the highest level of reliance on the service.

Sample based on all respondents (2526)





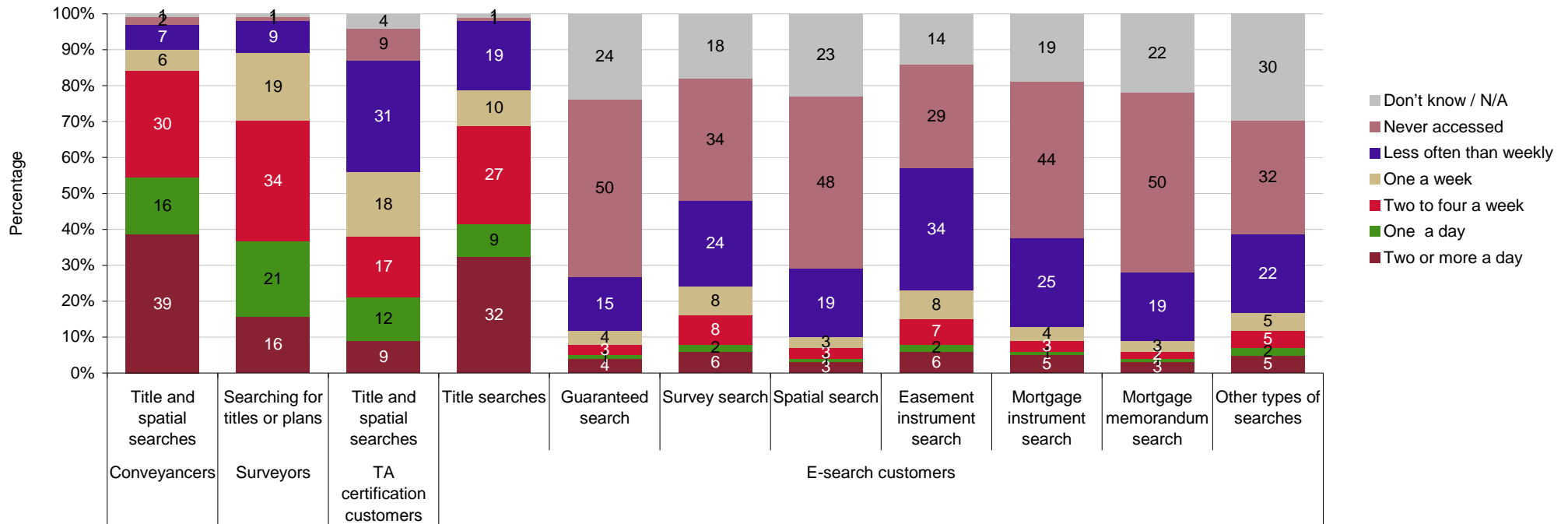
Section 2

Current usage of Landonline

Frequency of use: search functions

Graph 4: Frequency of Landonline searches by customer type

Q8. About how many times each week, on average, do you use Landonline to complete each of the following types of transactions?



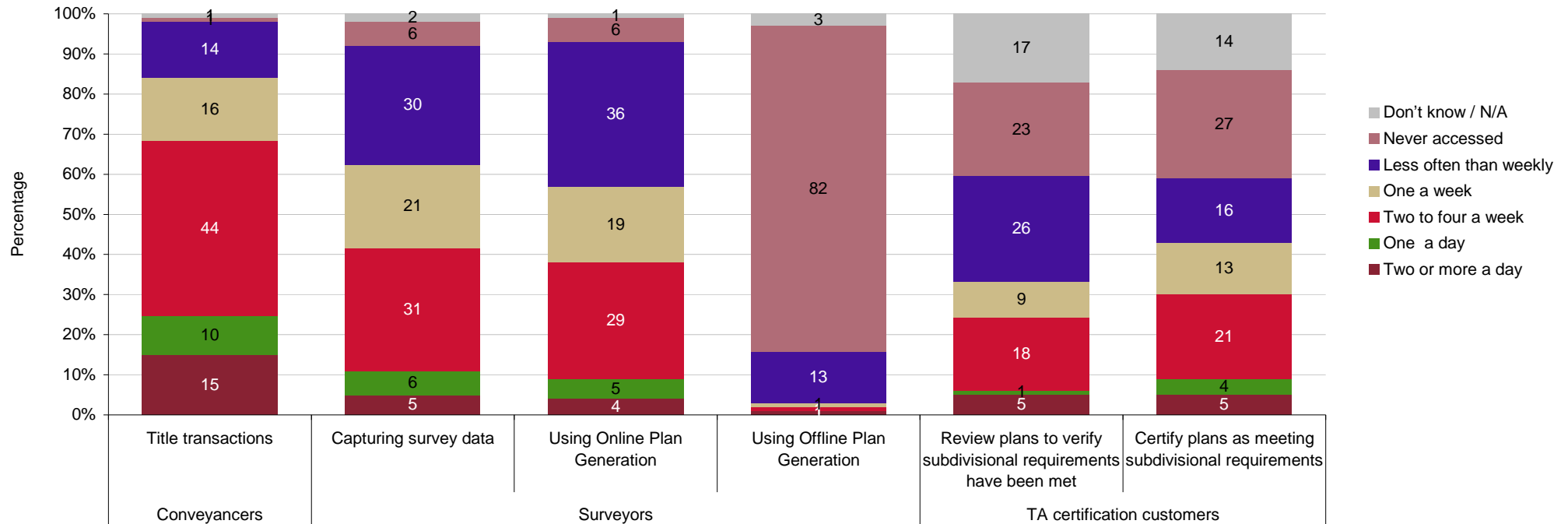
- 55% of conveyancers conduct at least one search a day, compared to 37% of surveyors
- Guaranteed searches, spatial searches and mortgage memorandum searches are the least frequently used search types among e-search customers.



Frequency of use: non-search functions

Graph 5: Frequency of Landonline transactions by customer type

Q8. About how many times each week, on average, do you use Landonline to complete each of the following types of transactions?



- The average conveyancer conducts four to five title transactions in the average week, while the majority of surveyors generate plans once a week or less
- 3% of surveyors use Offline Plan Generation at least once a week, and only 16% have used the service in total.





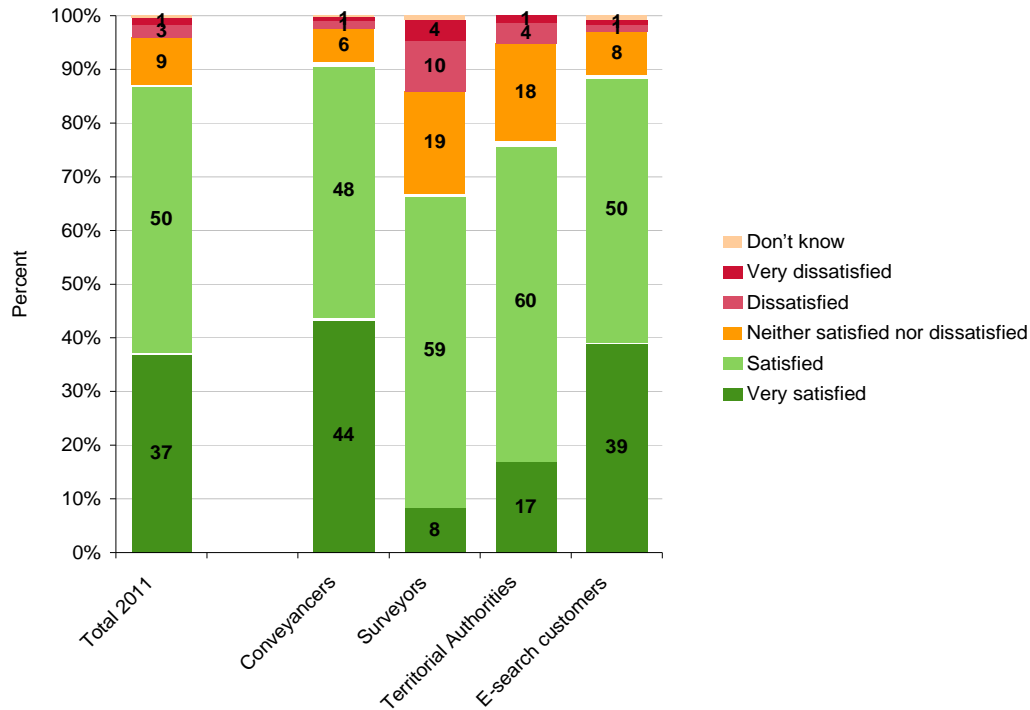
Section 3

Landonline opinions and satisfaction

While most customers are satisfied with Landonline overall, only a third are “very satisfied”

Graph 6: Overall satisfaction with Landonline

Q13. Taking everything into account, how satisfied or dissatisfied are you with the Landonline service?



Sample based on all respondents (2526)

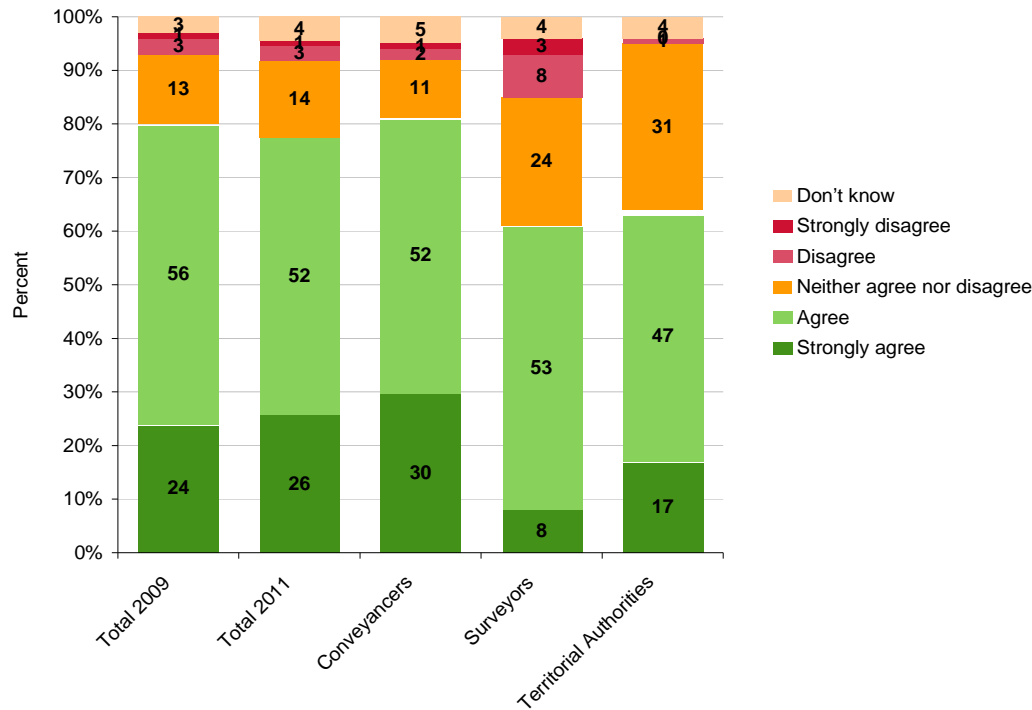
- ◆ Nine out of ten conveyancers (91%) and e-search customers (89%) state that they are satisfied or very satisfied with the Landonline service
- ◆ Satisfaction levels among the other customer groups are considerably lower: 67% of surveyors are satisfied with Landonline (only 8% “very satisfied”), and 77% of TA certification customers
 - ◆ Surveyors’ satisfaction scores are lower among certify and sign users than for non-signing users, and those in small firms are more likely to be dissatisfied or very dissatisfied than those in large firms.



Most agree that Landonline has improved LINZ's product offering, but only 1/4 agree strongly

Graph 7: Landonline's improvement of LINZ products and service offering

Q15. To what extent do you agree or disagree that Landonline has improved LINZ's products and services?



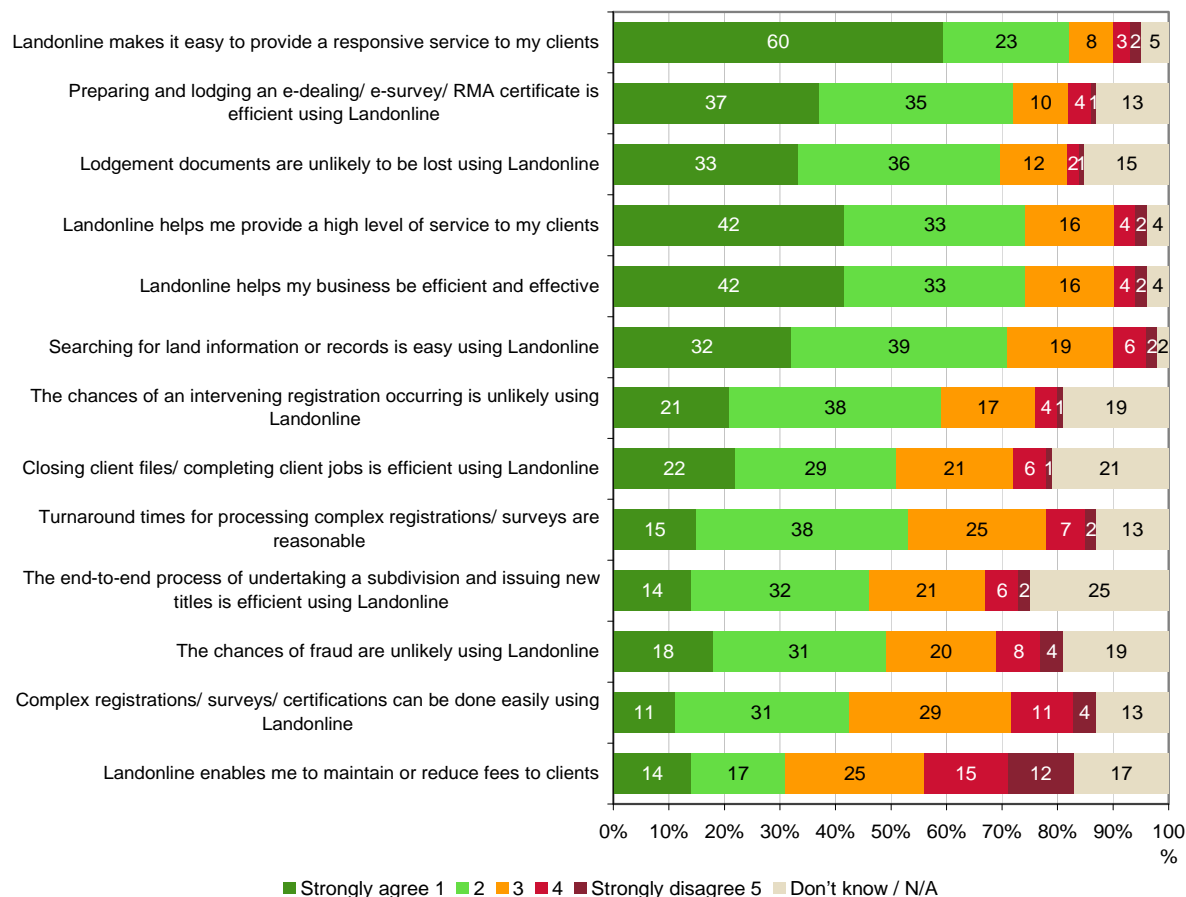
Sample based on all respondents (2526)

- ◆ Since 2009, there has been no significant change in customer perception of Landonline's improvement of LINZ products and services
 - ◆ Responses are very similar to those observed in 2009 for all customer groups
- ◆ 78% of customers agree that Landonline has improved LINZ's overall offering, compared to 80% of those interviewed in 2009
- ◆ At least one third of surveyor and TA certification customers do not agree that Landonline has improved LINZ services.



Landonline enables users to provide good service to clients – but does not reduce costs

Graph 8: Statements about Landonline – ranking by average agreement



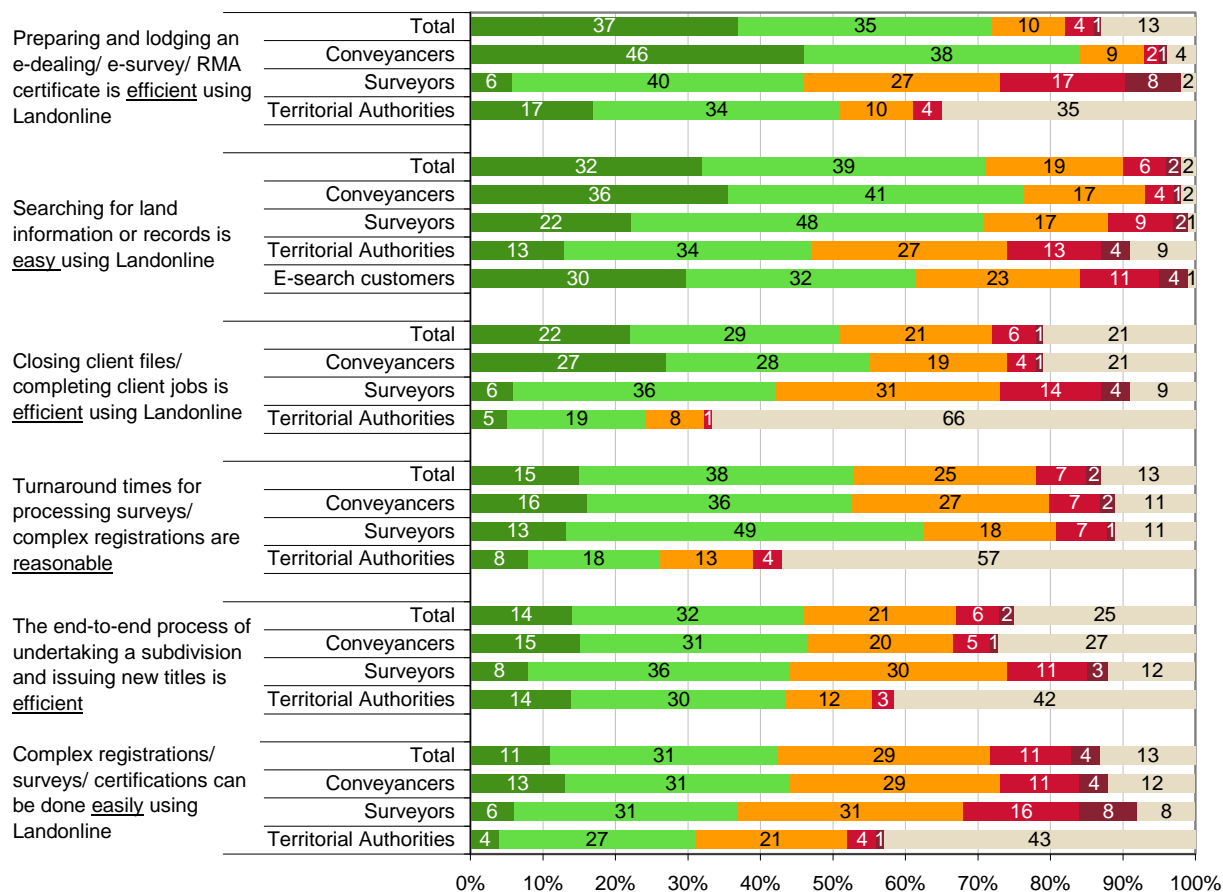
Sample based on all respondents (2526)

- ◆ This graph shows overall levels of agreement with 12 statements about various aspects of Landonline
 - ◆ Statements related to: client service and costs; efficiency; and risk
- ◆ The vast majority of customers agree that Landonline enables them to provide a high level of service to their clients
- ◆ In each of the different customer groups, less than 40% of users agree that Landonline enables the maintenance or reduction of fees to clients.



Efficiency and cost perceptions have an obvious connection for surveyors

Graph 9: Landonline opinion statements: client service



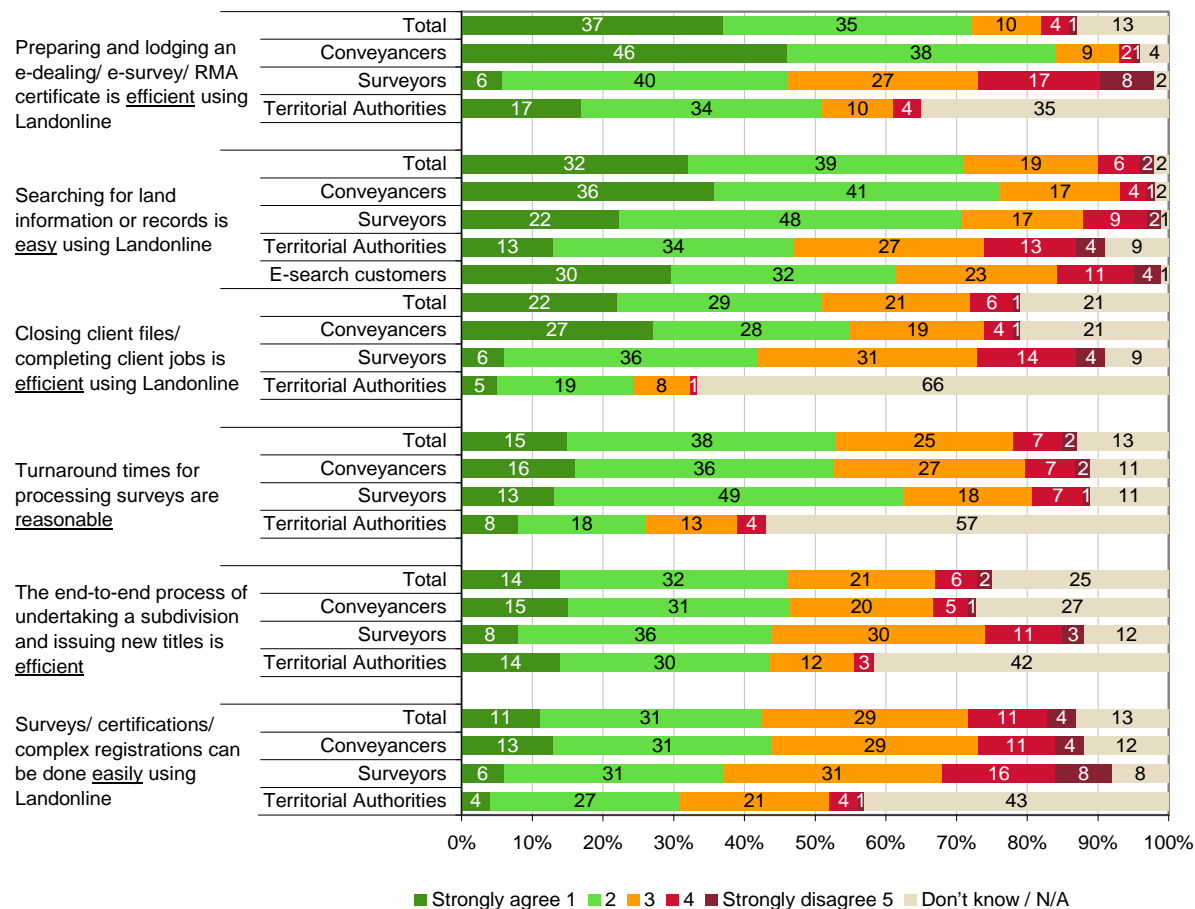
Sample based on all respondents (2526) ■ Strongly agree 1 ■ 2 ■ 3 ■ 4 ■ Strongly disagree 5 ■ Don't know / N/A

- Most conveyancers agree strongly that Landonline enables them to provide a responsive service to their clients
- Many conveyancers also agree that Landonline helps their business to be efficient and effective, and to provide a high level of service to clients
- Despite this conveyancers, like all other customer groups, do not agree on balance that Landonline enables them to maintain or reduce the fees they charge to clients
- Less than half of surveyors agree that Landonline helps their business be efficient and effective.



Efficiency perception varies significantly between conveyancers and surveyors

Graph 10: Landonline opinion statements: efficiency



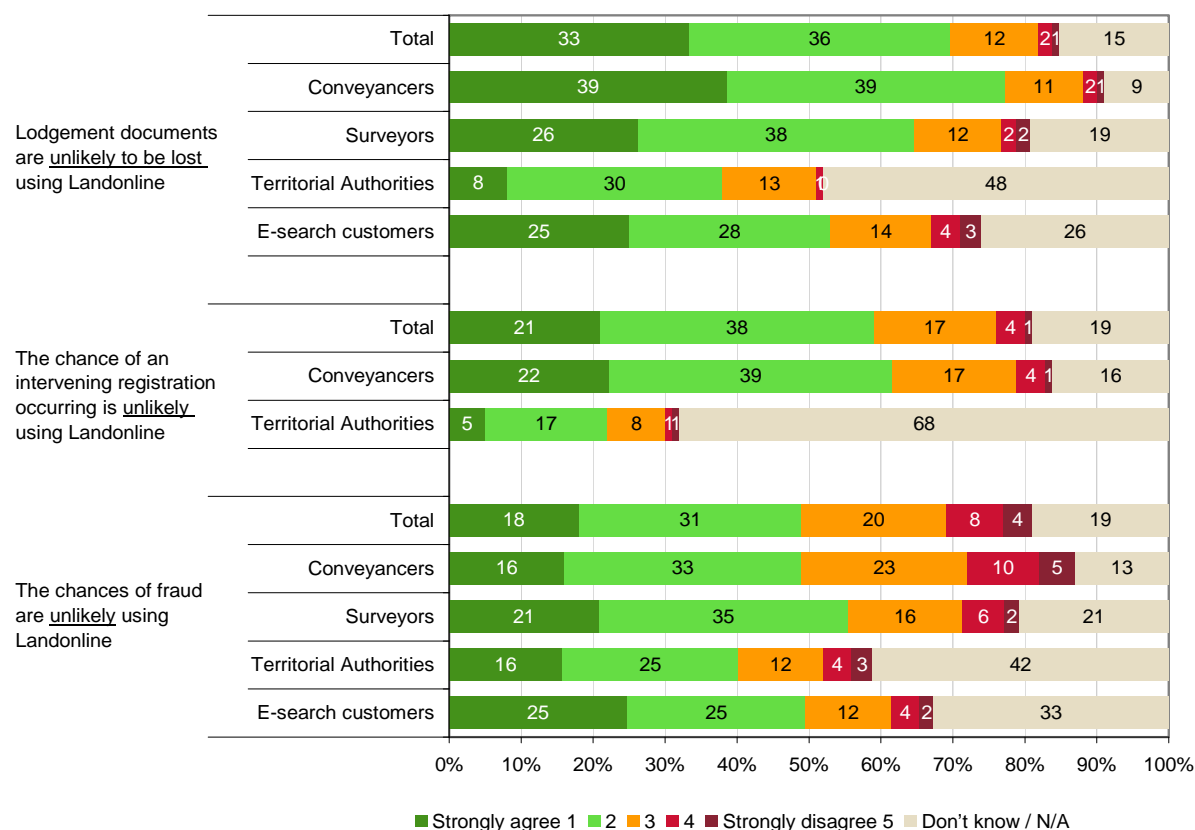
Sample based on all respondents (2526)

- ◆ A significant proportion of surveyors disagree with statements about the efficiency of Landonline
- ◆ Some e-search, surveyor and TA certification customers do not appear to find the Landonline interface easy to use – particularly the search function
 - ◆ Newer users and those with lower activity levels are less likely to agree that Landonline is easy to use
- ◆ Less than half of conveyancers and surveyors agree that complex registrations and surveys can be done easily using Landonline.



Some customers are not convinced about Landonline's security benefits

Graph 11: Landonline opinion statements: risk



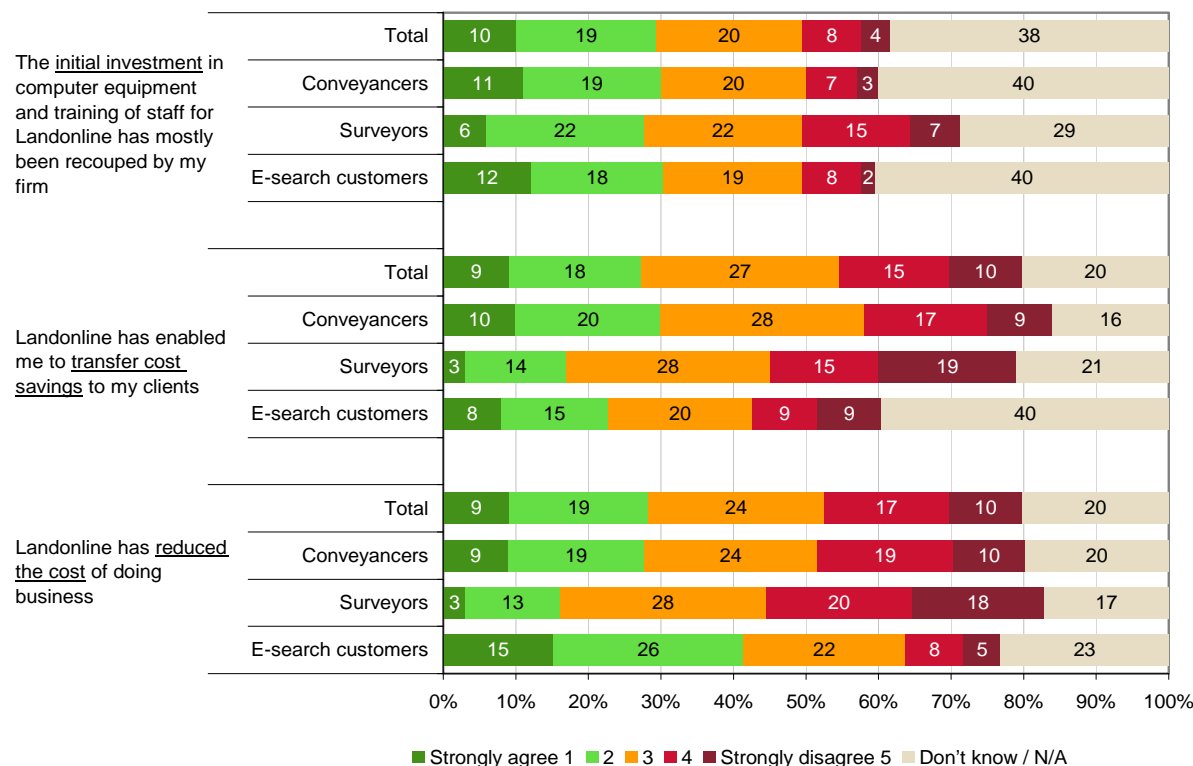
Sample based on all respondents (2526)

- Conveyancers are the most likely to agree that the loss of lodgement documents is unlikely with Landonline, but the least likely to agree that the chances of fraud are unlikely using Landonline
 - Less than half of conveyancers agree that fraud is unlikely with Landonline
- Many surveyors, territorial authorities and e-search customers do not feel well enough informed to express an opinion on the risks of Landonline.



Has Landonline brought automation benefits? Cost savings experienced by less than 1/3

Graph 12: Landonline automation benefits: cost, savings & investment



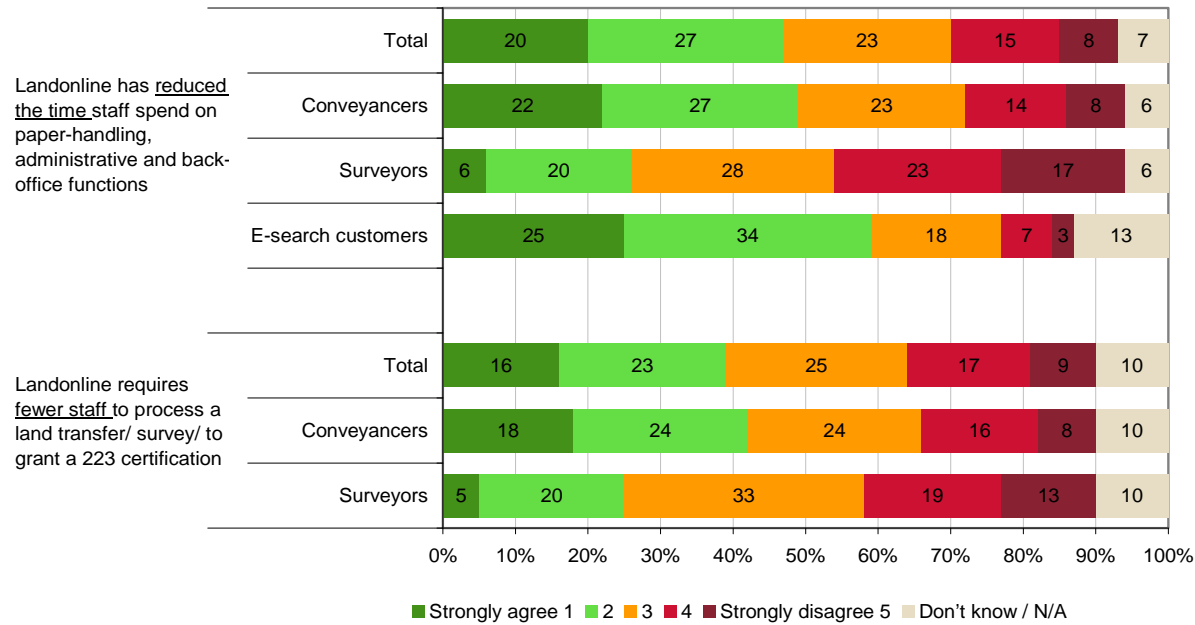
- ◆ Landonline costs are the area in which responses are most consistent across customer groups, and also the area in which responses are most negative overall
- ◆ Despite this relative consistency, surveyors are significantly more likely than other groups to “strongly disagree” that Landonline has enabled the transfer of cost savings to clients or has reduced the cost of doing business.

Sample based on respondents who had conducted paper-based transactions or searches prior to Landonline's introduction (1906)
 Results for Territorial Authorities are not shown in this comparison due to insufficient sample size, but are included in measures for the total sample



Has Landonline brought automation benefits? Mixed views on staff effort reductions

Graph 13: Landonline automation benefits statements: staff



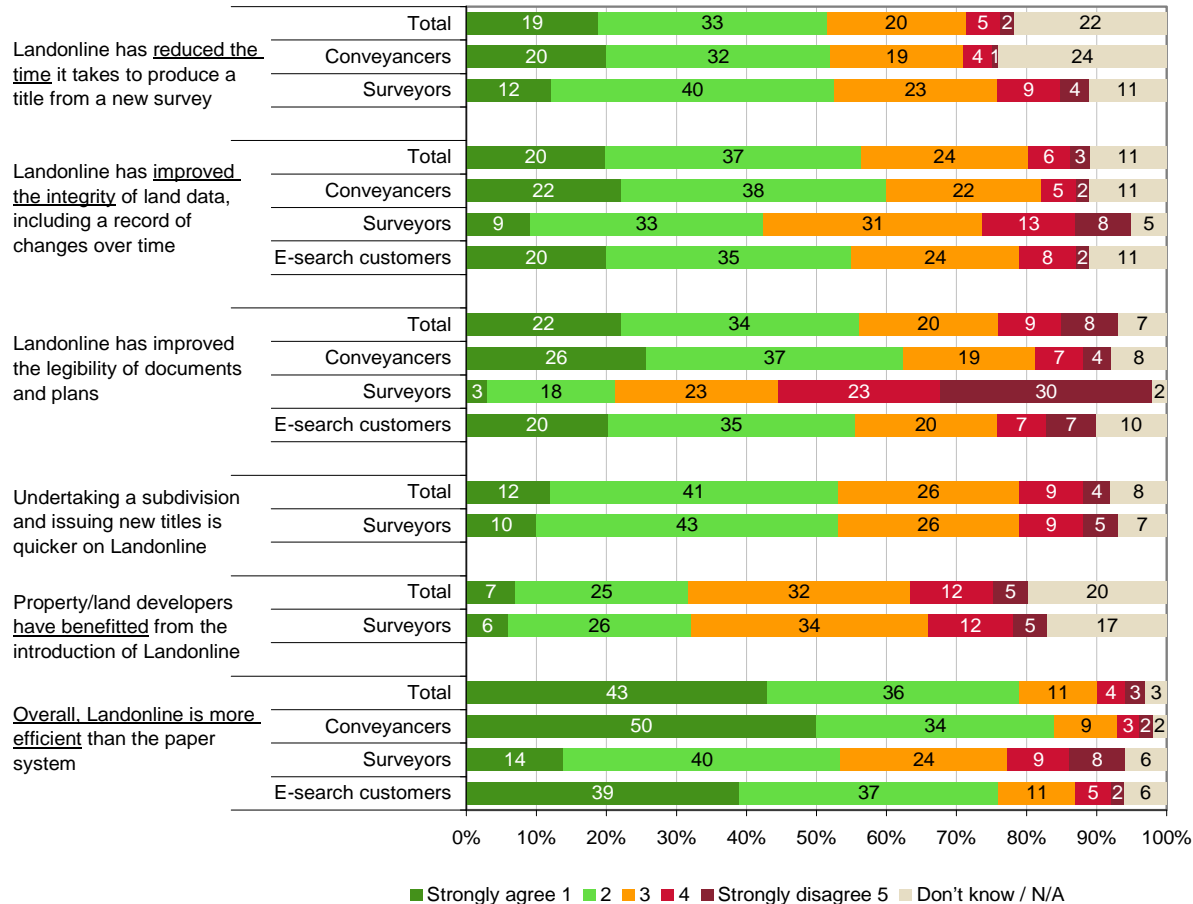
- While Landonline appears to have brought staff time reductions for many e-search customers (59% agree), less than half of conveyancers and surveyors agree that it has reduced the time staff spend on administrative functions
 - 40% of surveyors disagree that this benefit has been realised, compared to 26% who agree
- Within the conveyancer and surveyor groups, firms appear to have mixed experiences in terms of the numbers of staff required to process a land transfer or survey.

Sample based on respondents who had conducted paper-based transactions or searches prior to Landonline's introduction (1906)
Results for Territorial Authorities are not shown in this comparison due to insufficient sample size, but are included in measures for the total sample



Has Landonline brought automation benefits? Efficiencies have been achieved overall

Graph 14: Landonline automation benefits statements: improvements & efficiency



- ◆ At an overall level, the majority of customers – including surveyors – agree that using Landonline is more efficient than the paper-based system
 - ◆ 50% of conveyancers “strongly agree” that Landonline is more efficient than the paper system
- ◆ The legibility of plans in Landonline appears to have deteriorated, rather than improved, according to the response of surveyors
 - ◆ 30% of surveyors “strongly disagree” that the legibility of plans has improved
- ◆ Views on the integrity of land data are mixed among surveyors.



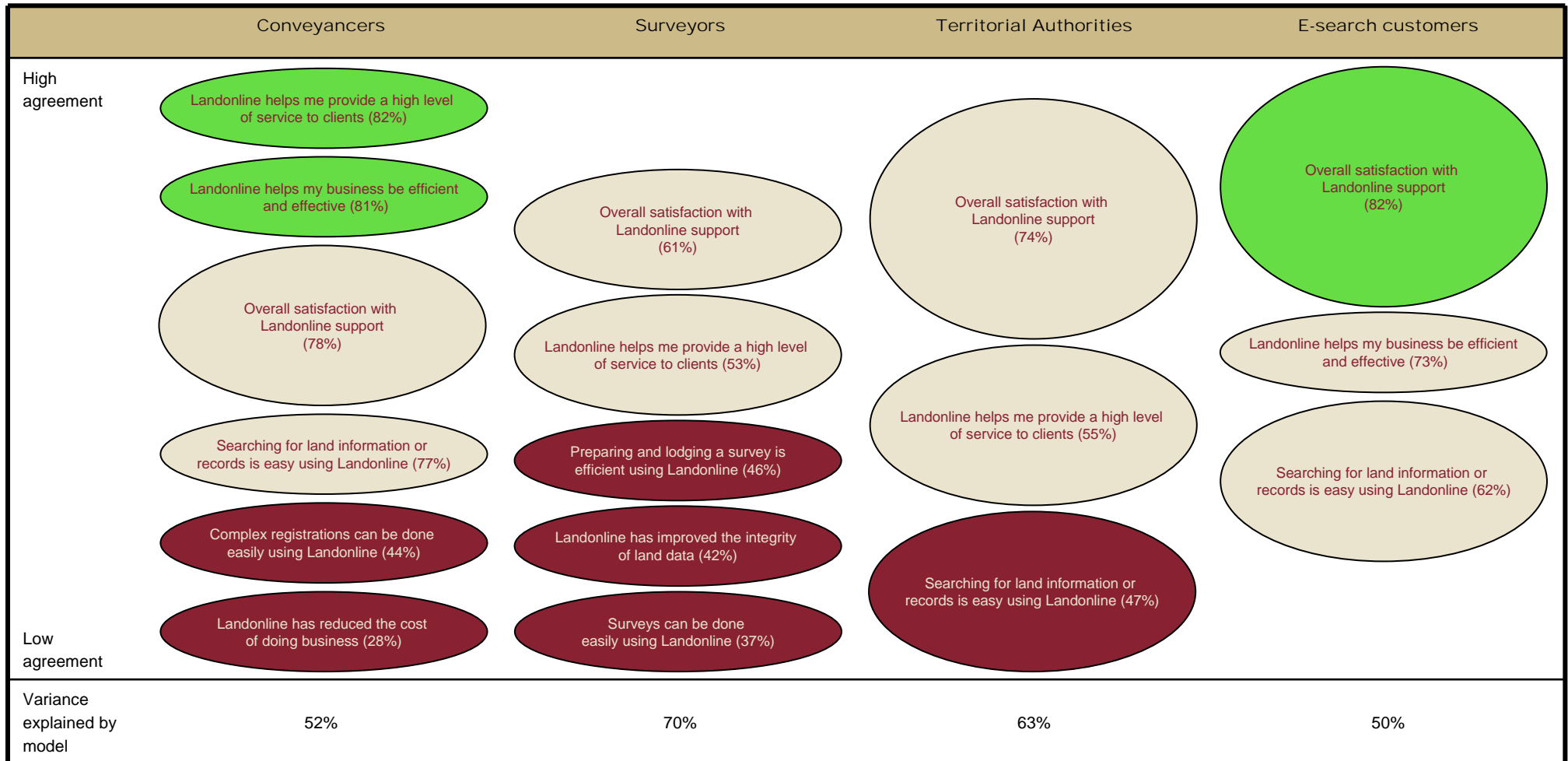
Main drivers of satisfaction

- ◆ The following pages (33-37) present the findings of analysis into what the key factors are that determine whether a customer is satisfied or dissatisfied with the Landonline service overall
- ◆ Page 32 shows a basic summary of findings from regression analyses for each of the main customer groups
 - ◆ Variation: Each regression model attempts to explain as much as possible of the variation in respondents' overall satisfaction with Landonline, using the smallest possible number of factors. In the case of surveyors, it was found that five individual Landonline service elements explained 70% of all variation in their overall satisfaction
 - ◆ Bubble colour: Within each bubble, the percentage of customers in that group who “agree” or “strongly agree” with each statement is shown in brackets. Bubbles are coloured to reflect high (green), medium (tan) or low (red) levels of overall agreement
 - ◆ Bubble size: Statements in the largest bubbles have an approximately 3 x greater contribution to overall satisfaction than the small bubbles, and statements in medium-size bubbles contribute twice as much as the smaller bubbles
- ◆ Pages 33-36 show a graphical comparison of Landonline’s performance on individual service elements, compared to their importance to customers
 - ◆ “Performance”, on the horizontal axis, is measured by the percentage of respondents who “agreed” or “strongly agreed with each statement
 - ◆ “Importance”, on the vertical axis, measures each statement’s correlation with overall satisfaction

<p>“Fix it”</p> <p>This quadrant includes service elements with high importance but low performance – these are areas in which <u>performance needs to be improved</u></p>	<p>“Keep it up”</p> <p>This quadrant includes service elements with high importance and also high performance – these are the <u>areas which need to be maintained</u></p>
<p>“Check it”</p> <p>This quadrant includes service elements with lower importance and also lower performance – improvement is also required but with lower priority</p>	<p>“Review it”</p> <p>This quadrant includes elements with low importance but high performance – LINZ is performing well and should maintain performance but with lower priority</p>

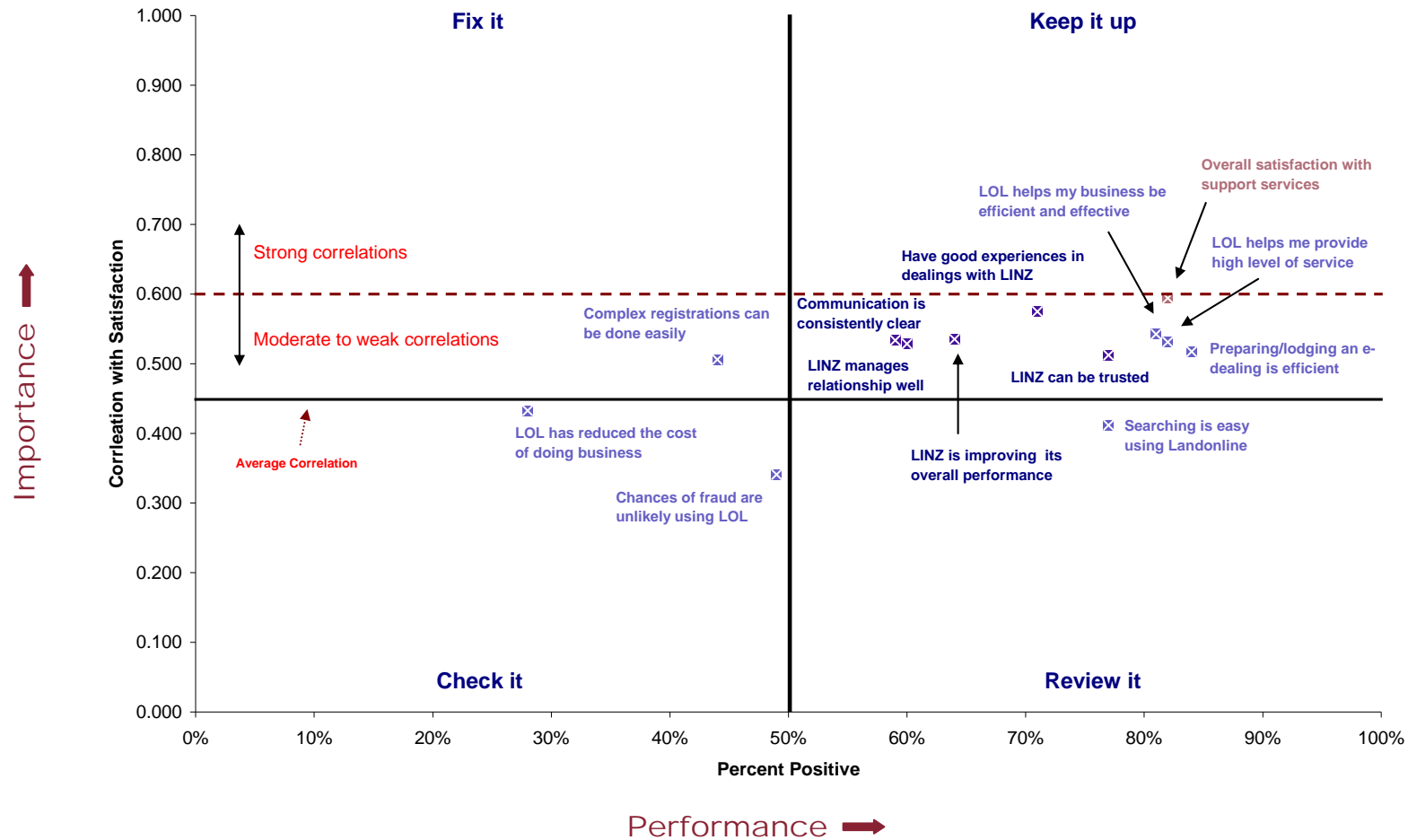


Main drivers of satisfaction by customer type



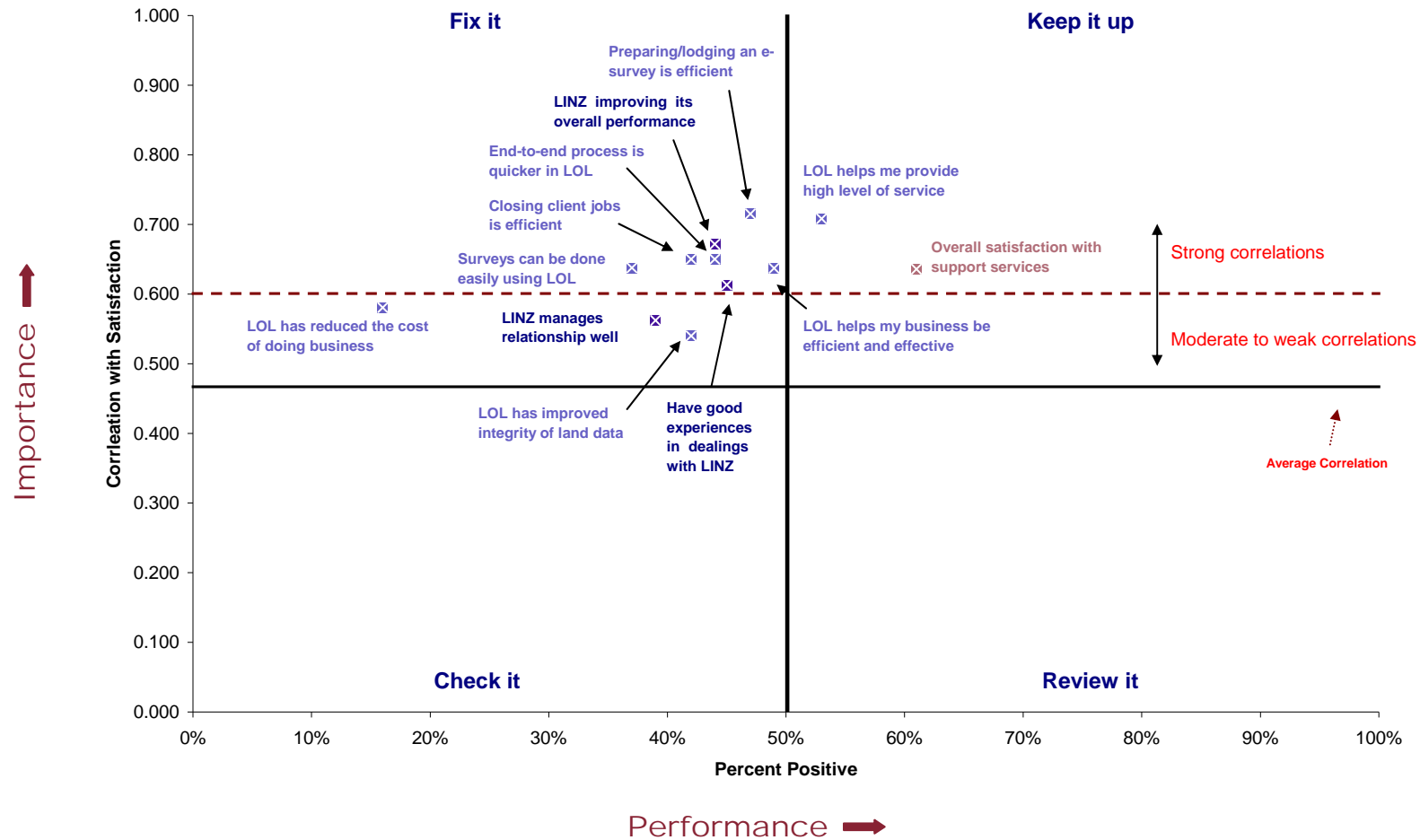
Drivers of satisfaction: Conveyancers

Graph 15: Performance and importance of key drivers: Conveyancers



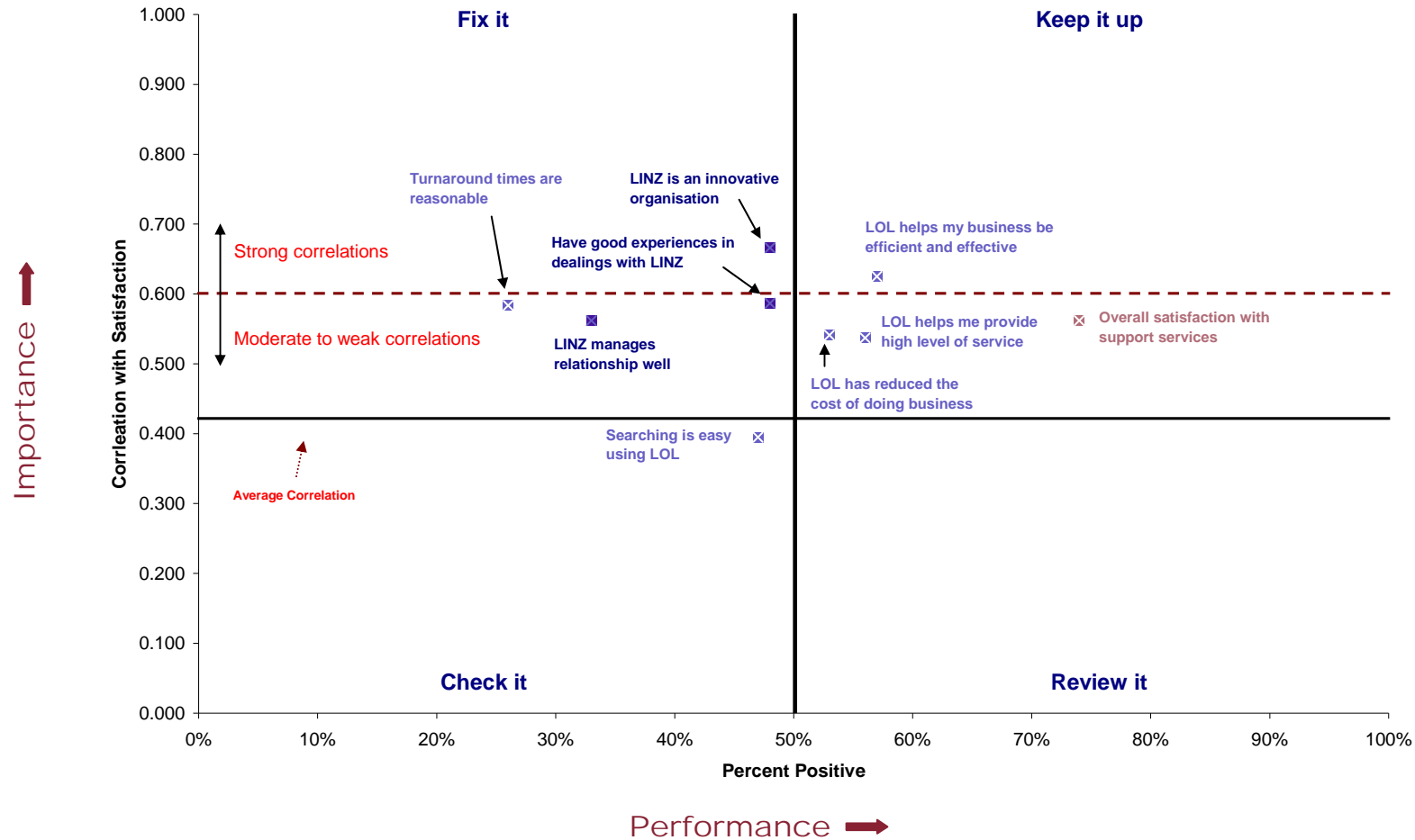
Drivers of satisfaction: Surveyors

Graph 16: Performance and importance of key drivers: Surveyors



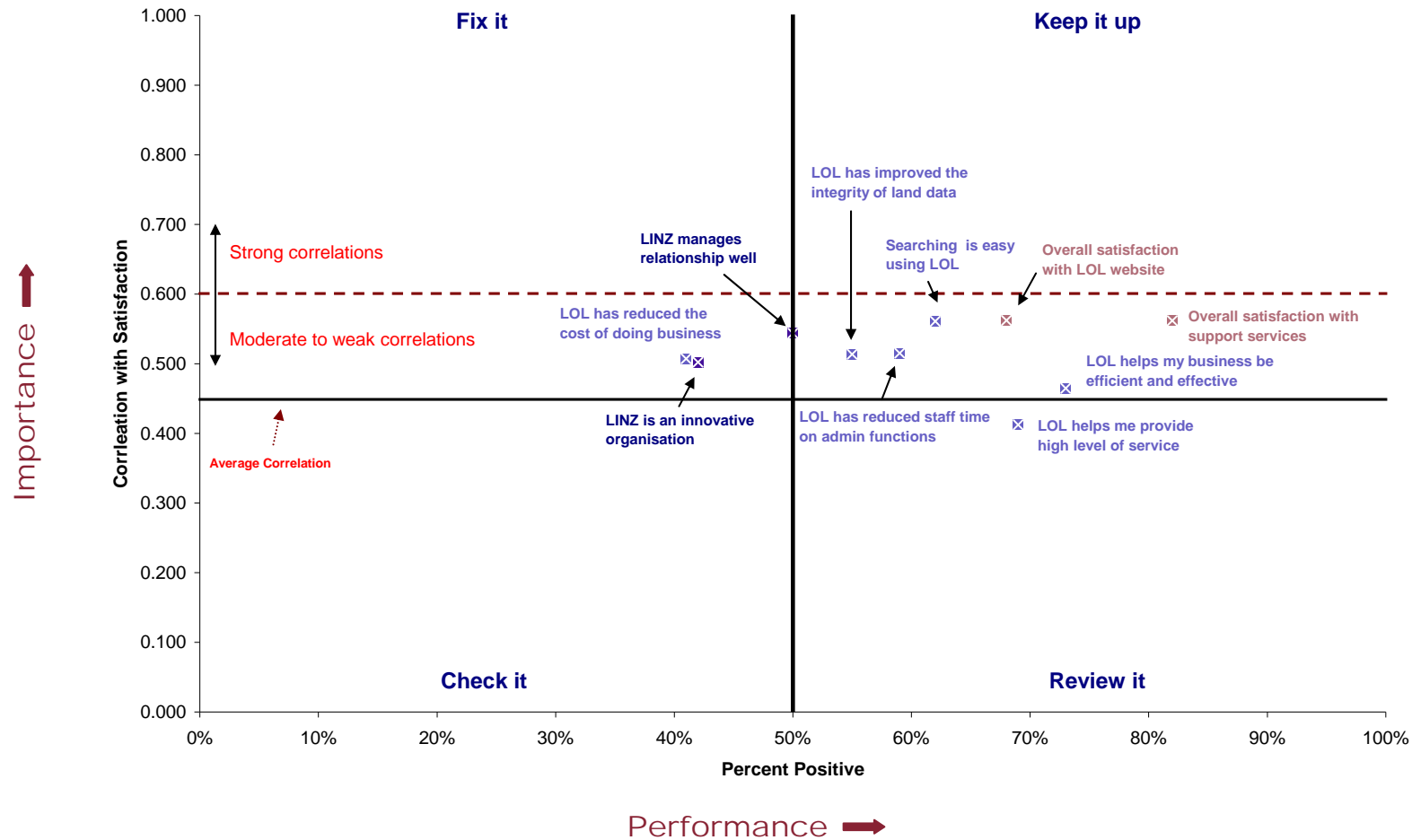
Drivers of satisfaction: Territorial Authorities

Graph 17: Performance and importance of key drivers: Territorial Authorities



Drivers of satisfaction: e-search customers

Graph 18: Performance and importance of key drivers: e-search customers



Efficiency issues are top of mind for dissatisfied customers

Table 8: Main reasons for dissatisfaction with Landonline

Q14. Can you help us to understand how you have answered question 13 by explaining why you are dissatisfied with Landonline?

Conveyancers		Surveyors	
Base =	28** %	Base =	31 %
E-dealing: Time/ effort/ cost to client required to process dealings	32	E-survey: Time/ effort/ cost to client required to prepare surveys	45
LINZ staff: Absence of expert help/ difficult to reach senior staff	25	E-survey: Data quality issues	29
LINZ staff: Knowledge/ competence of support staff	21	Landonline: Interface/ usability	19
Landonline: Costs	14	Landonline: Costs	16
Landonline: Software issues	14	E-survey: Difficult to read plans in Landonline	13
LINZ staff: Unhelpful	14	Landonline: Software issues	10
E-dealing: Processing times	14		
LINZ staff: Delayed/ unanswered responses to queries	11	Sample based on those who are 'dissatisfied' or 'very dissatisfied' with Landonline support	
Landonline: Searching not easy/ intuitive	11	** Caution: low base number of respondents- results are indicative only	
Landonline: Some manual/ paper transactions still needed	11		
E-dealing: Difficulty in submitting complex dealings	11		

- ◆ Issues relating to time and effort – or a perceived lack of efficiency with the Landonline process – are the most common reason for dissatisfaction among conveyancers and surveyors
- ◆ Negative experiences with LINZ staff have also been an issue for some conveyancers, while a small number of surveyors complain about data quality and the legibility of plans
- ◆ Dissatisfied e-search customers (low sample) mention costs, issues with the Landonline interface and search function, and customer support issues
- ◆ At least two TA customers complained of unhelpful staff, unsatisfactory processing times and Landonline software issues.



Examples of feedback: dissatisfaction with the Landonline service

◆ E-survey: Time/effort/cost required to prepare surveys

“Landonline has introduced a significant number of steps into the process of completing a subdivision survey plan which significantly increases the time taken to prepare, lodge and QA a plan then under the paper plan system. This means that the costs to clients has increased under Landonline, not decreased”

“The data capture is extremely time consuming & difficult to understand. A small last minute amendment to a vector for example creates a great deal of work”

◆ E-dealing: Time/effort/cost required to process dealings

“Lawyers are now required to do not only their own work, but that of the land registry office as well. This results in huge amounts of time wasted most of which is not recoverable in terms of fees to clients. The rapid turnaround of registration is perhaps the only positive outcome of this system”

◆ Landonline costs

“Cost of searches increasing again is unsatisfactory, and seems unnecessary given that it is digital information”

◆ E-survey: data quality issues

“On a lot of the work we are doing, a significant percentage of our time is taken up in getting errors in Landonline corrected, in order to be able to get a survey into Landonline”

◆ Landonline: interface/usability

“The process for searching is not intuitive. The steps to get a search done are clunky and require experience to understand the particular requirements of the search points”

“Unless the information you enter exactly matches what LOL has searching is very difficult”

“GUI is not helpful, flaky, and impossible to search without complete entry that matches Landonline”.



Suggested improvements: satisfied conveyancers observe similar weaknesses to those less satisfied

Table 9: Main areas for improvement – Conveyancers

Q16. Is there anything in particular that LINZ could do to improve the quality of its Landonline service for organisations such as yours?

	Base =	Conveyancers 495 %
LINZ staff: Improve knowledge of customer support staff		17
LINZ staff: Better access to experts/ senior staff		14
Landonline: Lower costs		10
Landonline: Improve search functions		9
E-dealing: Faster lodgement processing times		8
LINZ staff: Improve attitude/ be more helpful		7
LINZ staff: Prompter response to queries		7
E-dealing: Improve support/ information for complex dealings		6
Landonline: Improve interface/ usability		5
Landonline: Reduce software issues		5

Suggestions mentioned by at least 5% of responding conveyancers have been shown here

- ◆ When asked for suggestions on how LINZ could improve the quality of its Landonline service, more than a third (36%) of conveyancers mentioned potential improvements relating to LINZ staff
 - ◆ The desire for a prompter response to complex queries is widely held, and is articulated in a number of different suggestions – from improving the knowledge of helpdesk staff, to providing easier access to more senior staff
- ◆ 43% mentioned general improvements for the Landonline service
 - ◆ Reducing the costs of the service and improving the usability of Landonline – particularly the search function – were the main themes of suggestions in this area
- ◆ 26% mentioned functions of Landonline which are specific to e-dealing



Suggested improvements: surveyors require improved support, enhancements to e-survey

Table 10: Main areas for improvement – Surveyors

Q16. Is there anything in particular that LINZ could do to improve the quality of its Landonline service for organisations such as yours?

	Base =	Surveyors 132 %
LINZ staff: Better access to experts/ senior staff		20
LINZ staff: Improve knowledge of customer support staff		15
E-survey: Drafting plans in Landonline, make easier/ provide better tools		11
LINZ staff: Prompter response to queries		8
E-survey: Improve Offline Plan Generation		8
E-survey: Improve data quality		7
LINZ staff: Improve attitude/ be more helpful		5
Landonline: Extend operating hours		5
E-survey: Improve access to historical documents/ plans		5
E-survey: Improve image quality of plans		5

Suggestions mentioned by at least 5% of responding surveyors have been shown here

- ◆ 37% of surveyors mentioned potential improvements relating to LINZ staff
 - ◆ Like conveyancers, more than a third of surveyors desire improvements to customer service
- ◆ Only 22% of surveyors mentioned general improvements for the Landonline service
 - ◆ Extending the operating hours of Landonline was the most frequently mentioned suggestion in this area
- ◆ 46% mentioned functions of Landonline which are specific to e-survey
 - ◆ Surveyors are more likely than conveyancers to make suggestions which are specific to their own Landonline functions
 - ◆ A wide range of suggestions were fielded, including making it easier to draft plans, improving OPG and improving the quality of data.



Suggested improvements: TAs are most likely to cite issues with Landonline usability

Table 11: Main areas for improvement – Territorial Authorities

Q16. Is there anything in particular that LINZ could do to improve the quality of its Landonline service for organisations such as yours?

	Territorial Authorities
Base =	33 %
Landonline: Improve interface/ usability	27
Landonline: Ability to complete all transactions electronically	12
LINZ staff: Better access to experts/ senior staff	9
LINZ staff: Prompter response to queries	9
E-certification: Improve data quality	9
LINZ staff: Improve knowledge of customer support staff	6
Landonline: Lower costs	6
LINZ staff: Improve attitude/ be more helpful	6
Landonline: Reduce software issues	6
E-certification: Improve processing/ turnaround times	6

Suggestions mentioned by at least 5% of responding TAs have been shown here

- ◆ One in four certifying Territorial Authority customers (27%) mentioned potential improvements relating to LINZ staff
 - ◆ Some TA customers feel that customer support staff do not understand their needs
- ◆ 61% of certifying Territorial Authority customers mentioned general improvements for the Landonline service
 - ◆ TA customers are most likely to struggle with the overall usability of Landonline
- ◆ 18% mentioned functions of Landonline which are specific to their needs
 - ◆ There is some dissatisfaction at the requirement to manually lodge some certificates.



Suggested improvements: e-search customers

Table 12: Main areas for improvement – E-search customers

Q16. Is there anything in particular that LINZ could do to improve the quality of its Landonline service for organisations such as yours?

	E-search customers
Base =	187 %
E-search: Improve search functions	26
E-search: Improve quality of historical documents/ plans	16
Landonline: Lower costs	13
Landonline: Reduce printing problems	7
Landonline: Improve interface/ usability	6
Landonline: Reduce software issues	6
E-search: Improve access to historical documents/ plans	6

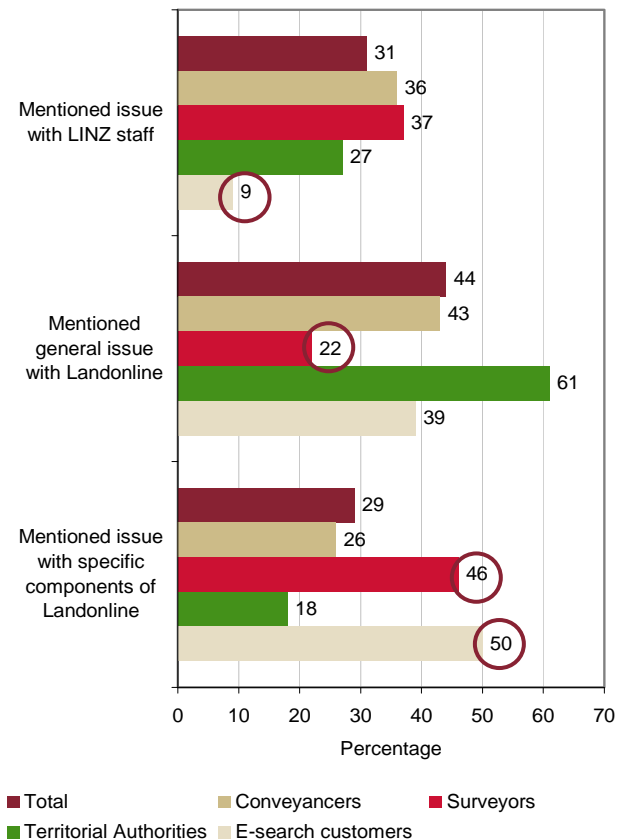
- ◆ When asked for suggestions on how LINZ could improve the quality of its Landonline service, only 9% of e-search customers mentioned potential improvements relating to LINZ staff
 - ◆ E-search customers are the least likely of all customer groups to cite staff issues
- ◆ 39% of e-search customers mentioned general improvements for the Landonline service
 - ◆ Costs, printing issues and software issues were some of the mentioned areas for improvement
- ◆ 50% mentioned functions of Landonline which are specific to e-search
 - ◆ One in four e-search customers (26%) suggested that improvements could be made to the Landonline search function
 - ◆ An issue with the scanning quality of historical documents was raised by at least 30 individual e-search customers

Suggestions mentioned by at least 5% of responding e-search customers have been shown here



Examples of feedback: suggestions for improving the quality of the Landonline service

Graph 19: Main themes of suggested improvements to Landonline service



Open-ended question, sample based on all respondents (2526)

- Improve knowledge of support staff / Better access to senior staff**

“Could you please have trained staff on your helpdesk. Sometimes when I've called they have given incorrect advice and created problems, and they don't seem to have experience or understanding on complex issues which is usually the only time you are phoning”

“Provide timely support for complex legal questions related to edealing - the 0800 number people usually do not know the answer to complex questions. A system of escalating a query from the 0800 number to someone who knows the answer, without us having to wait up to 5 working days, would be helpful. Organise the information on the Landonline website in a way that makes it easy to find answers to queries. There is good information there and I often remember seeing something of use there but then can't find it again when I go back to the website looking for it”
- Improve Landonline interface/usability**

“In terms of the functionality of Landonline as a system, it has been my experience that Landonline can be somewhat difficult for new users to become accustomed to (as it is designed very differently to many Microsoft Office-type programs, which most people deal with regularly these days), however I believe that once people are accustomed to the system, it's not too bad”
- Improve search functions of Landonline**

“More user friendly and searching by address would be more useful and quicker. Like QV”.





Section 4

Landonline support services

Key findings: Landonline support services

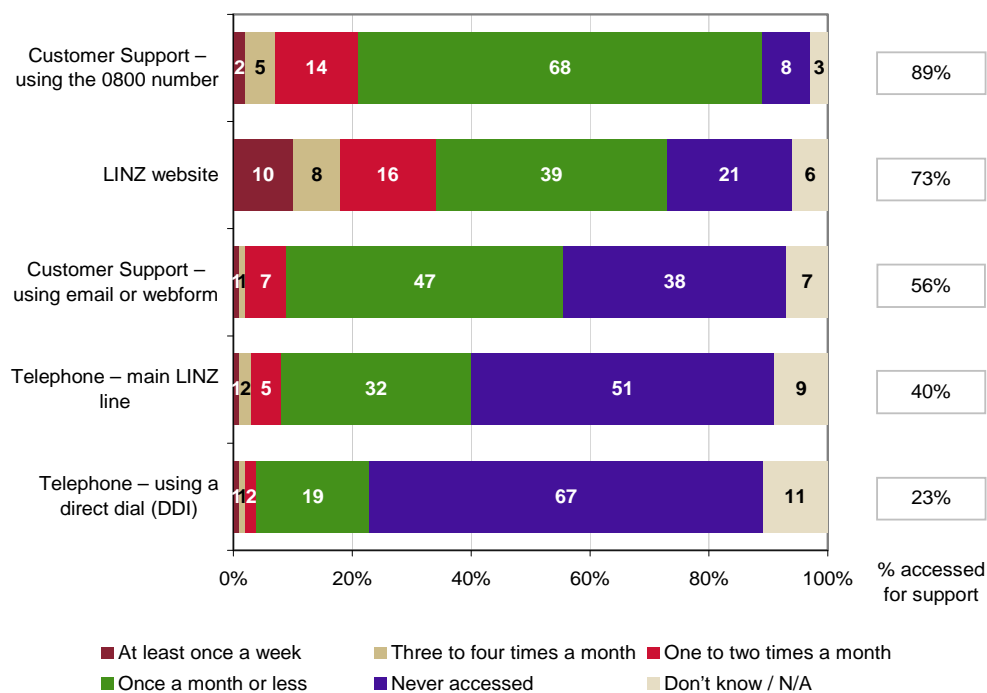
- ◆ Two years on from the introduction of mandatory e-lodgement, support services are still very much a necessity for Landonline customers
 - ◆ 89% of customers used the 0800 customer support number in the last year, compared to 90% in 2009
- ◆ Results demonstrate an ongoing need for support beyond what is available in published sources
 - ◆ Customers express the need for a prompt response to queries, even if the query is a complex one
 - ◆ The 2009 survey found that telephone is the preferred contact method for 74% of customers
- ◆ Landonline customer support services are widely used but do not always reflect well on LINZ
 - ◆ With the vast majority of customers using support services at some point, it is important that their interaction is a good one
 - ◆ Satisfaction with support services is identified as a key driver of overall satisfaction for all customer groups. Overall, three quarters (77%) of customers are satisfied with the support services they have received
 - ◆ Resolving issues at first contact and the understanding of customers' needs are the two areas achieving the lowest levels of agreement – and both are particularly low-scoring for surveyors and TA certification customers.



Nine out of ten customers have used the 0800 helpdesk

Graph 20: Usage of support channels

Q17. There are a number of ways that Landonline customers can access support from LINZ. From the list below, about how many times each month, on average, do you access each area?



- ◆ Survey results show relatively high reliance on the 0800 helpdesk, with one in five customers (21%) calling at least once a month
 - ◆ Surveyors are the group which is most reliant on the 0800 service: 48% call the 0800 number at least once a month
- ◆ 79% of customers have referred to the LINZ website for their support needs
 - ◆ Again, surveyors are the most frequent users of this medium, with 53% using it at least once a month
- ◆ Only 16% of customers regularly contact Customer Support via email or web form.

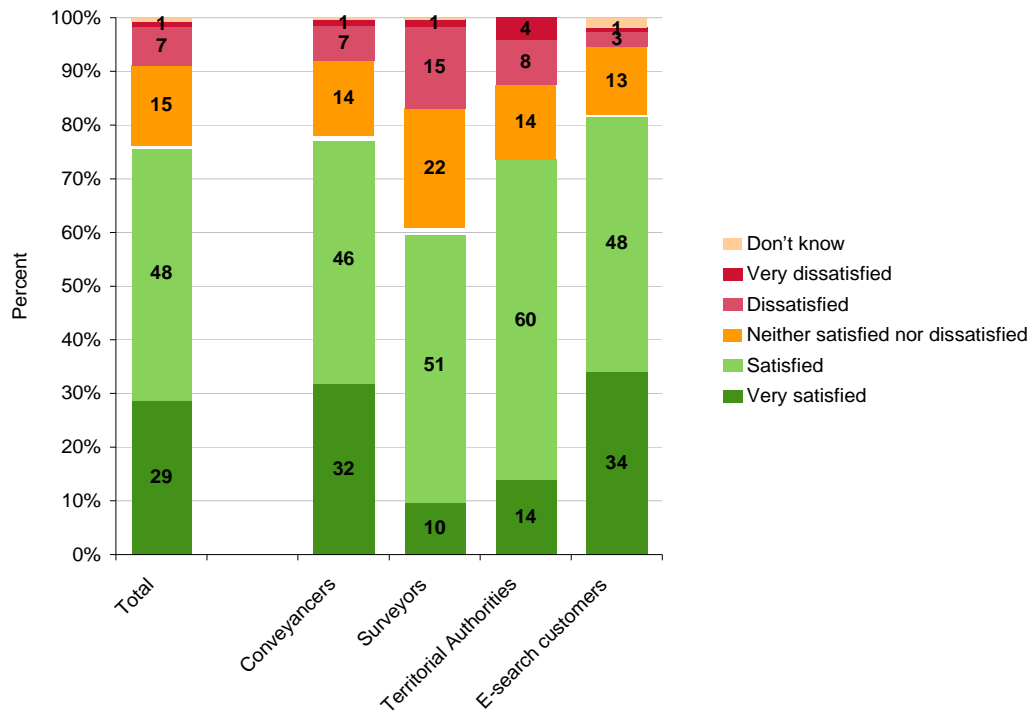
Sample based on all respondents (2510)



Room for improvement with Customer Support – particularly for surveyors and TA customers

Graph 21: Overall satisfaction with Customer Support

Q19. Taking everything into account, how satisfied or dissatisfied are you with the Landonline support you have received from LINZ?



Sample based on respondents who have used the 0800 or email/web form Customer Support channels (2376)

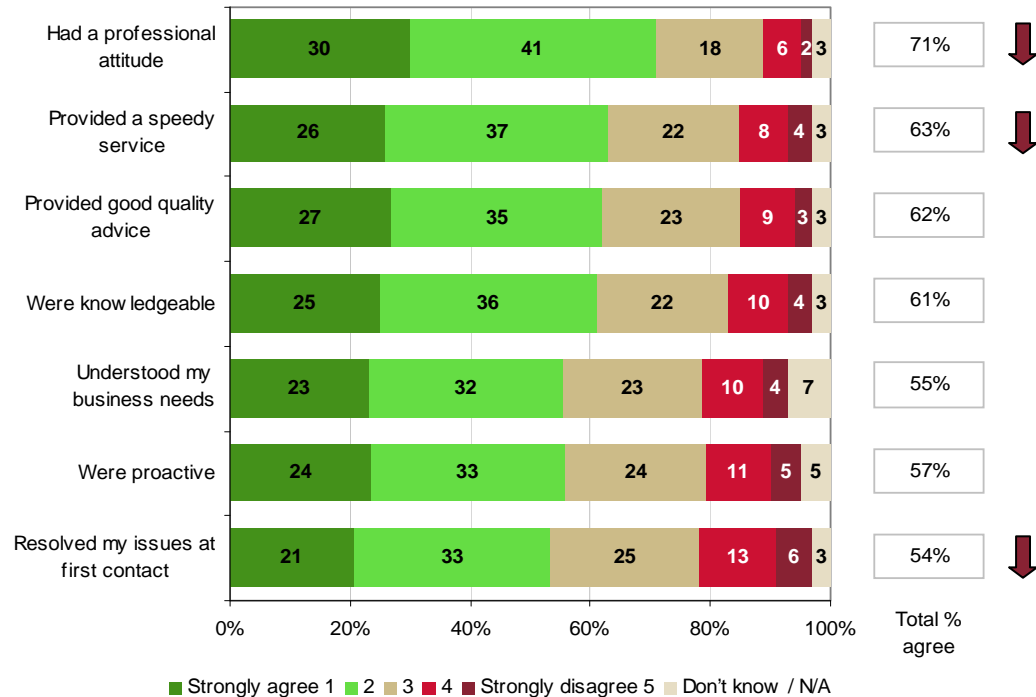
- ◆ 77% of customers are satisfied with the Landonline support they have received from LINZ
- ◆ Reflecting satisfaction levels with the Landonline service overall, conveyancers and e-search customers are significantly more satisfied than surveyors or TA customers
 - ◆ 16% of surveyors are dissatisfied with support services, as are 12% of TA customers.



Professional, but not always knowledgeable support staff

Graph 22: Rating aspects of assistance received – sorted by mean score

Q18. Customer support staff ...



- ◆ The majority of customers agree with all of the statements presented here about LINZ support staff, but there are some obvious areas for improvement
- ◆ More than half of customers say their issues are resolved by support staff at first contact (54%), but this is a considerably lower than in 2009 (81%)
- ◆ The knowledge of support staff and their understanding of customer needs are low scoring areas for surveyors
- ◆ One in five TA certification customers has experienced issues with the understanding and proactiveness of support staff.

Sample based on respondents who have used the 0800 or email/web form Customer Support channels (2376)



Knowledge and helpfulness of support staff highlighted as main reasons for dissatisfaction

Table 13: Reasons for dissatisfaction with Landonline support

Q20. Please help us to understand how you have answered question 19 by explaining why you are dissatisfied with Landonline support

Base =	Total 152* %	Conveyancers 93 %	Surveyors 34 %
Knowledge/ competence of helpdesk staff	49	43	62
Unhelpful LINZ staff	24	26	18
Delayed/ slow responses to queries	18	15	18
Received wrong/ incomplete advice	15	19	12
Difficult to reach senior staff	11	11	12
Inconsistent advice	9	8	12
Absence of expert help (e.g. for more complex enquiries)	8	11	0
Unanswered responses to queries	3	1	6
Other	10	9	15

* Open-ended question, sample based on those who are 'dissatisfied' or 'very dissatisfied' with Landonline support (152)

- ◆ Of the 8% of customers who are dissatisfied with the Landonline support they have received, half put this down to the knowledge or competence of helpdesk staff
- ◆ Issues relating to the attitude or helpfulness of LINZ staff have emerged as the second most frequently mentioned reason for dissatisfaction in 2011
- ◆ When first level support staff are unable to provide an adequate response, some customers are frustrated with the process of obtaining second level support – articulated as “slow response”, “difficult to reach senior staff” or “absence of expert help”
- ◆ Territorial Authority and e-Search customers (with a low number of responses to this question) share the same top three reasons for dissatisfaction as the total sample.



Examples of feedback: dissatisfaction with Landonline customer support

◆ Knowledge/competence of helpdesk staff

“The LoL support team often have very little knowledge on problem and you spend most of the time explaining what is wrong for them to tell you that they don't know how to fix it and tell you to email in to get the problem solved by the business analysts”

“You used to be able to go to a help desk and discuss a complex dealing”

◆ Unhelpful LINZ staff

“LINZ staff seem to be less and less helpful and only seem to be able to help with straightforward answers from a prompted script - anything unusual and they try to fob you off, also appear to be too scared to escalate your query to a superior”

◆ Delayed/slow response to queries

“On many occasions I have been satisfied with the support received for basic questions, however as time has gone on and my questions have become more complex I have often become frustrated by the lack of support received. The time delays in receiving a response from LINZ and the lack of acknowledgement of some of my emails have been frustrating”

◆ Received wrong/incomplete advice

“It is possible (and our common experience) to get completely contrary advice depending on who answers the phone. We have in the past sought advice, received email instructions on what is required in a field - but then the registration has been rejected as incorrect on the very field we have been advised on”

“Poor advice that resulted in requisitions. A lack of knowledge of survey practices”

◆ Difficult to reach senior staff

“I find it very frustrating to not be able [to have] direct access to competent staff instead leaving a message which is quite often responded to when I am out of the office”.



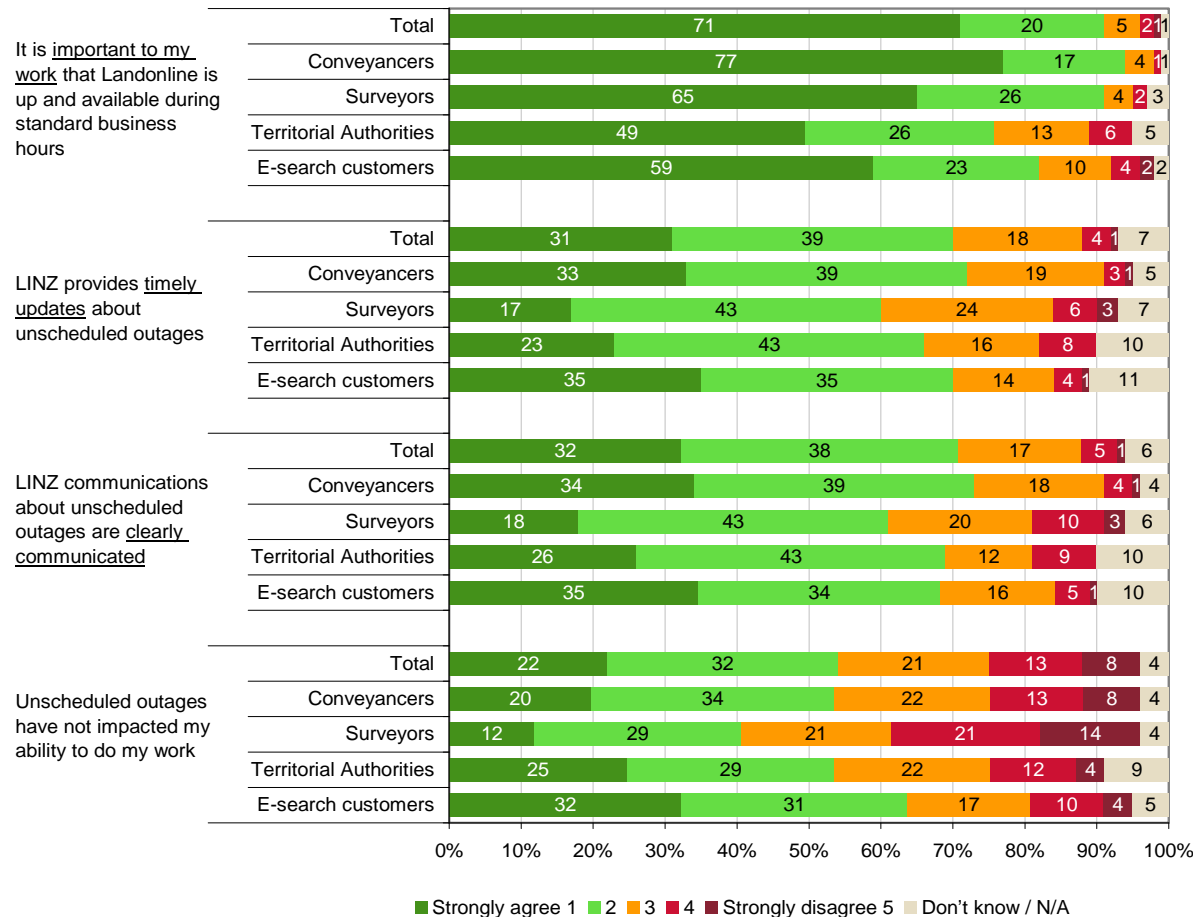


Section 5

Landonline availability and outages

The service could be more reliable, but communication about outages is timely

Graph 23: Statements about Landonline outages



- ◆ The availability of Landonline during standard business hours is considered highly important by 71% of customers
 - ◆ Conveyancers are particularly reliant on its availability
- ◆ Overall, it appears that unscheduled outages have impacted the ability to work of at least 21% of customers
 - ◆ Responses suggest that surveyors have felt the greatest impact from unscheduled outages
- ◆ 70% of customers believe that LINZ's communications about outages have been timely and well communicated.





Section 6

Landwrap, Landscan and LINZ
communications

Key findings: communication channels

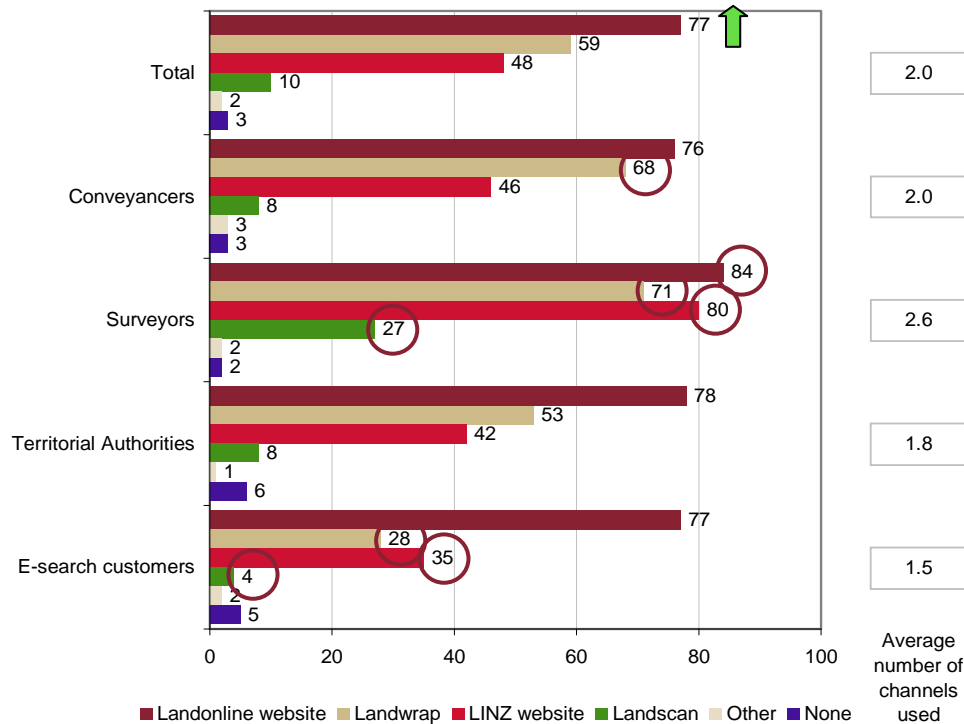
- ◆ One to two contacts per month appears to be the optimal level of communication with Landonline customers, however a range of frequencies appear to be satisfactory
- ◆ In line with the 2009 response, 89% of customers feel that the frequency of communications from LINZ is currently “about right”
- ◆ The Landonline website and Landwrap are used widely to acquire information from LINZ, and the LINZ website is also visited very frequently by around a quarter of Landonline customers
 - ◆ This finding suggests that all three of these publications are highly valuable resources, and need to be maintained and frequently updated to ensure currency of information
 - ◆ Uptake of Landwrap could be improved among newer Landonline customers (those who have been using the service for two years or less)
- ◆ Although the Landonline and LINZ websites are widely used and frequently visited, a significant proportion of customers do not find the sites easy to navigate and locate the information they need
 - ◆ This finding suggests that improvements in this area might reduce some of the future need for personal contact with LINZ support staff.



Online information channels are being used

Graph 24: Communications channels used

Q21. Which of the following communications channels do you use to get information from LINZ?



- ◆ In addition to their day-to-day contact with LINZ staff, on average Landonline customers use two of the standard published sources to obtain information from LINZ
- ◆ Content published on the Landonline website and in Landwrap is read by the majority of Landonline customers
- ◆ Surveyors are the customer group which is most likely to use each of these channels, while e-search customers are the least likely to consult Landwrap, the LINZ website or Landscan
- ◆ Those who have been using Landonline for five years or more are far more likely to read Landwrap or Landscan than newer users.

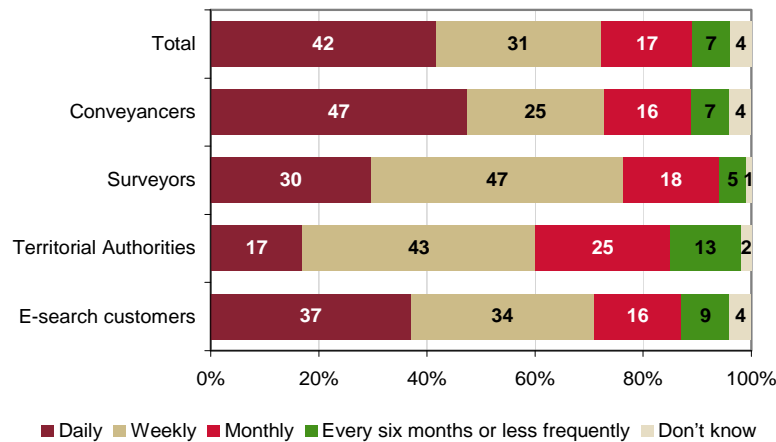
Sample based on all respondents (2494), results which are significantly different from the total sample are highlighted



The Landonline website is an important resource, but could be easier to navigate

Graph 25: Frequency of visits to the Landonline website

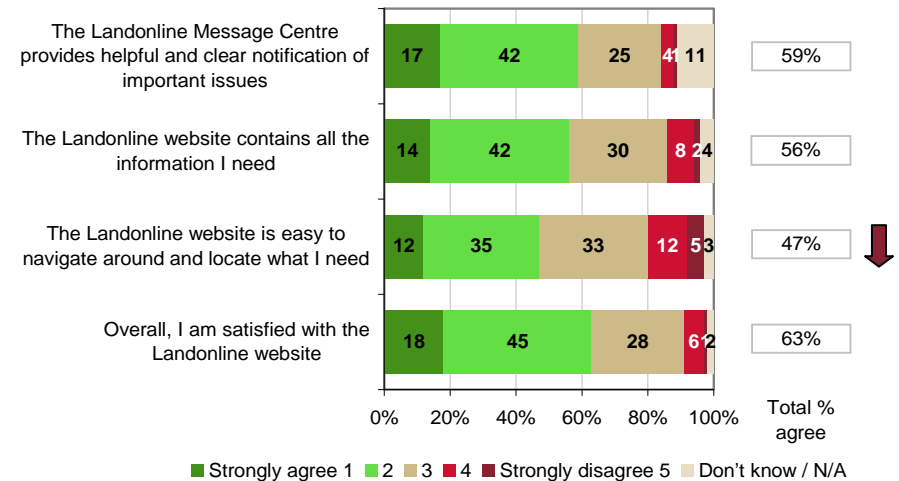
Q22. About how often do you visit the Landonline website (www.landonline.govt.nz)?



Sample based on those who mentioned the Landonline website as one of the channels they use to get information from LINZ

Graph 26: Attributes of the Landonline website

Q23. Please tell us how much you agree or disagree with the following aspects of the Landonline website



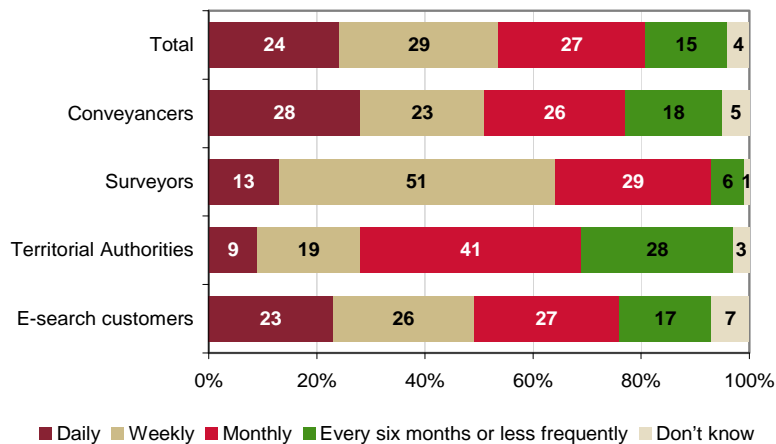
- Of the 77% of Landonline customers who use the Landonline website, almost three quarters (73%) visit at least once a week, suggesting it is a very important tool for many customers. Overall, 63% are satisfied with the site
- More than half of customers agree that the website is informative, but a significant proportion do not feel that it is easy to navigate. Low-volume Landonline users are less satisfied overall than high-volume users, and surveyors are the least satisfied customer group.



The LINZ website is also widely used, but some customers struggle to find what they need

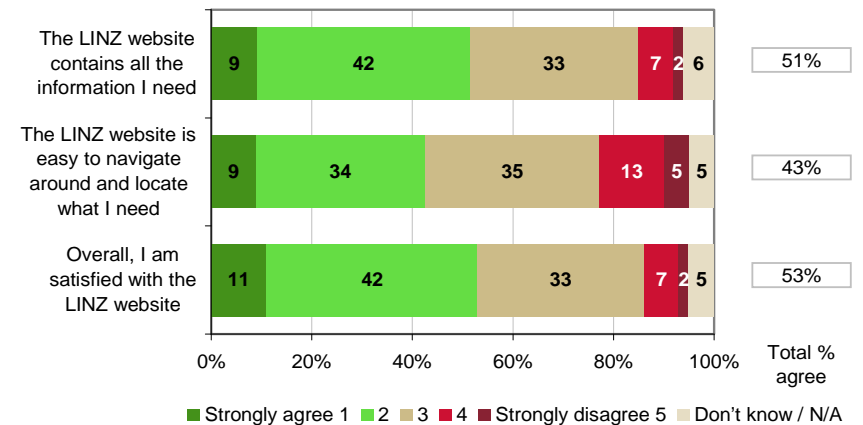
Graph 27: Frequency of visits to the LINZ website

Q22. About how often do you visit the LINZ website (www.linz.govt.nz)?



Graph 28: Attributes of the LINZ website

Q23. Please tell us how much you agree or disagree with the following aspects of the LINZ website



Sample based on those who mentioned the LINZ website as one of the channels they use to get information from LINZ

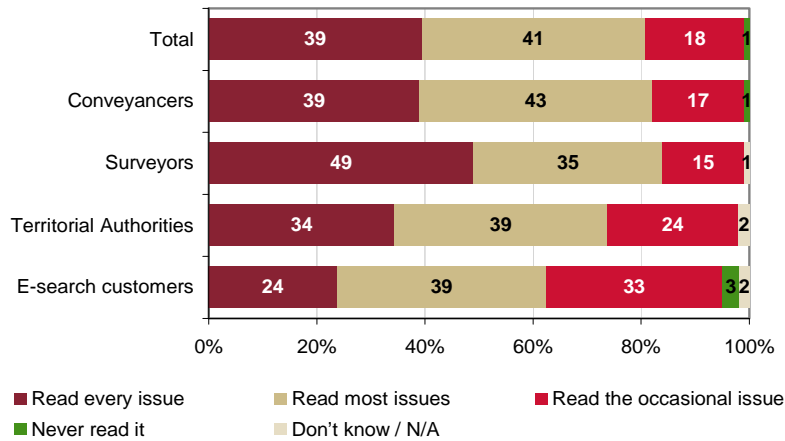
- Of the 48% of Landonline customers who visit the LINZ website for information, more than half (53%) visit at least once a week, and 53% are satisfied with the site
- Despite relatively high visit levels, only half (51%) of customers agree that the website contains all of the information they need
- Few customers are dissatisfied with the LINZ website, but almost half of surveyors provided a neutral response.



Landwrap is considered relevant by those who take the time to read it

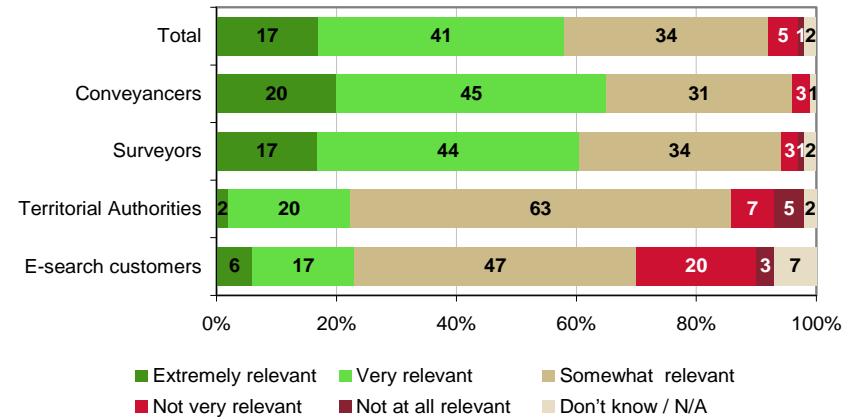
Graph 29: Frequency of Landwrap readership

Q26. About how often do you read or glance through Landwrap?



Graph 30: Relevance of Landwrap

Q27. And how relevant to your work is Landwrap?



Sample based on those who mentioned Landwrap as one of the channels they use to get information from LINZ

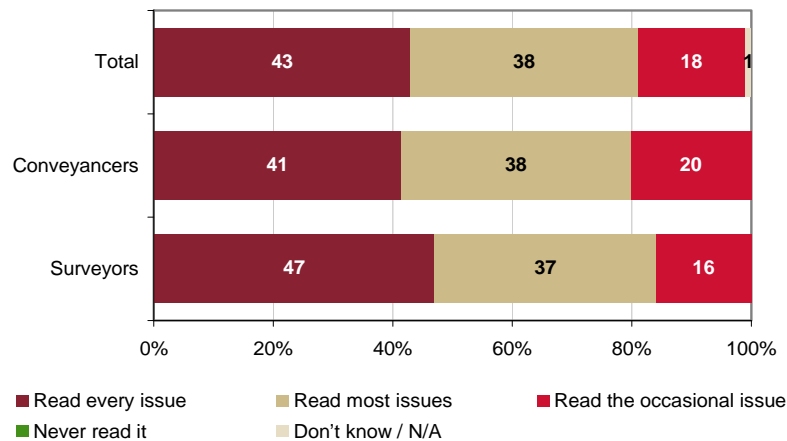
- Of the 59% of Landonline customers who use Landwrap as an information source, 80% read most issues
- Surveyors and those with high levels of Landonline activity are most likely to read Landwrap regularly
- Lower readership rates among Territorial Authorities and e-search customers appear to be linked to the perceived relevance of its content
- More than half (58%) of Landwrap's readers consider it to be highly relevant, up from 31% in 2009.



Landscan is relevant to a small minority

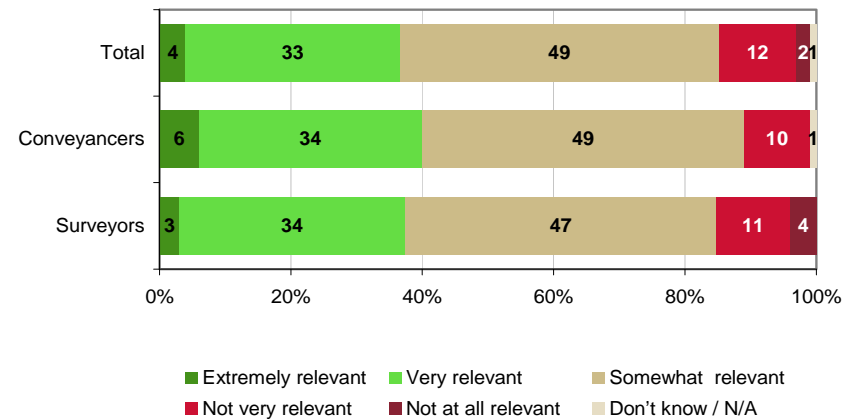
Graph 31: Frequency of Landscan readership

Q26. About how often do you read or glance through Landscan?



Graph 32: Relevance of Landscan

Q27. And how relevant to your work is Landscan?



Sample based on those who mentioned Landscan as one of the channels they use to get information from LINZ

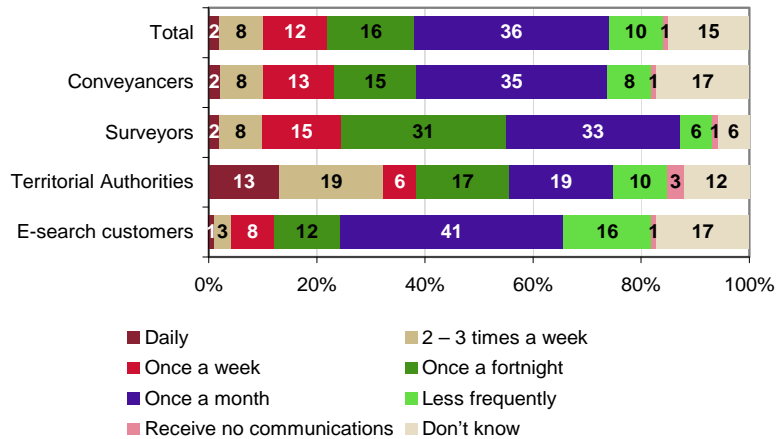
- Of the 10% of Landonline customers who use Landscan as an information source, 29% read most issues
- Overall, a very small proportion of Landonline customers read the publication and find it very relevant.



Current frequency of communication varies between customers, but is about right

Graph 33: Frequency of communication from LINZ

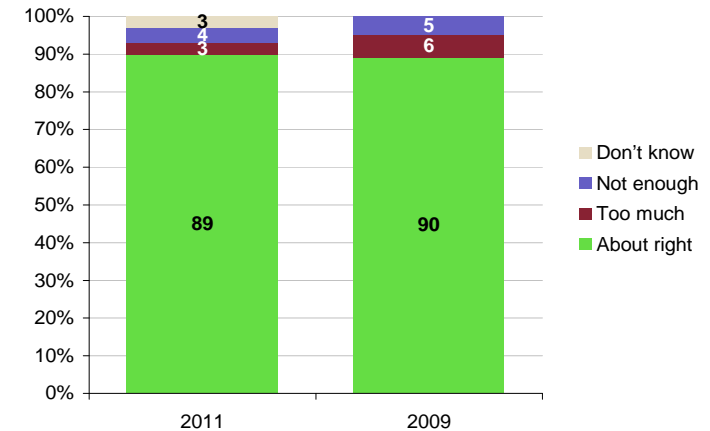
Q29. Overall, about how frequently do you receive communications from LINZ?



Sample based on all customers (2480)

Graph 34: Views on communication frequency

Q30. And overall, is the frequency of communication from LINZ ...?



Sample based on customers who receive some communications from LINZ (2033)

- ◆ There is currently a great deal of variation in the perceived frequency of communication from LINZ
 - ◆ 74% of customers receive communications at least once a month, with surveyors and TA customers receiving communication most often
- ◆ A comparison of communication frequency and customers' views on this frequency indicates that one or two contacts per month would be the optimal frequency of communication to suit most customers.

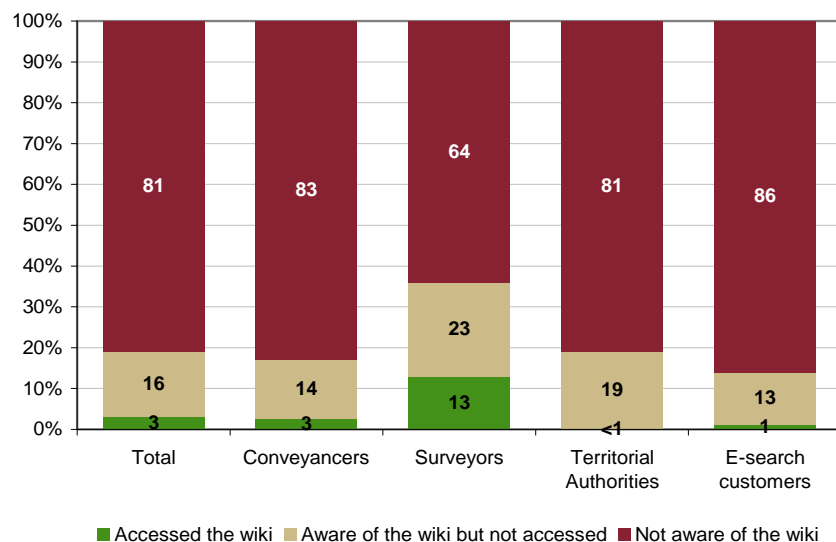


Limited awareness and usage of the Landonline Enhancement Wiki

Graph 35: Awareness and access of the Landonline Enhancement Wiki

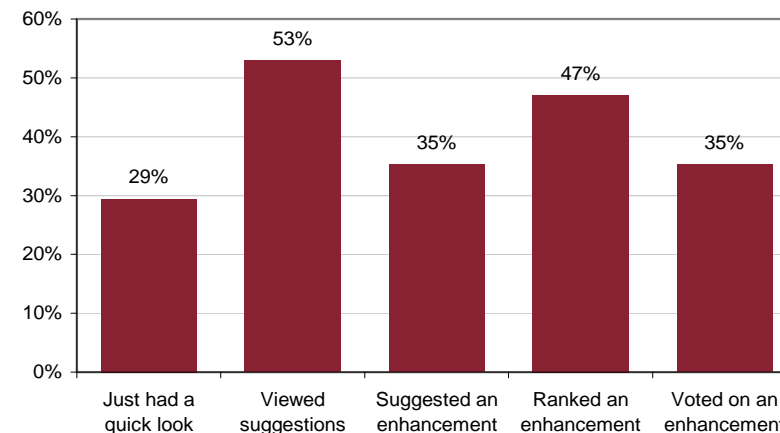
Q31. Were you aware of the Landonline Enhancement Wiki?

Q32. Have you accessed the Wiki?



Graph 36: Wiki functions used on last occasion

Q33. What did you do last time you visited the Wiki?



Sample based on those who have accessed the Landonline Enhancement Wiki (84)

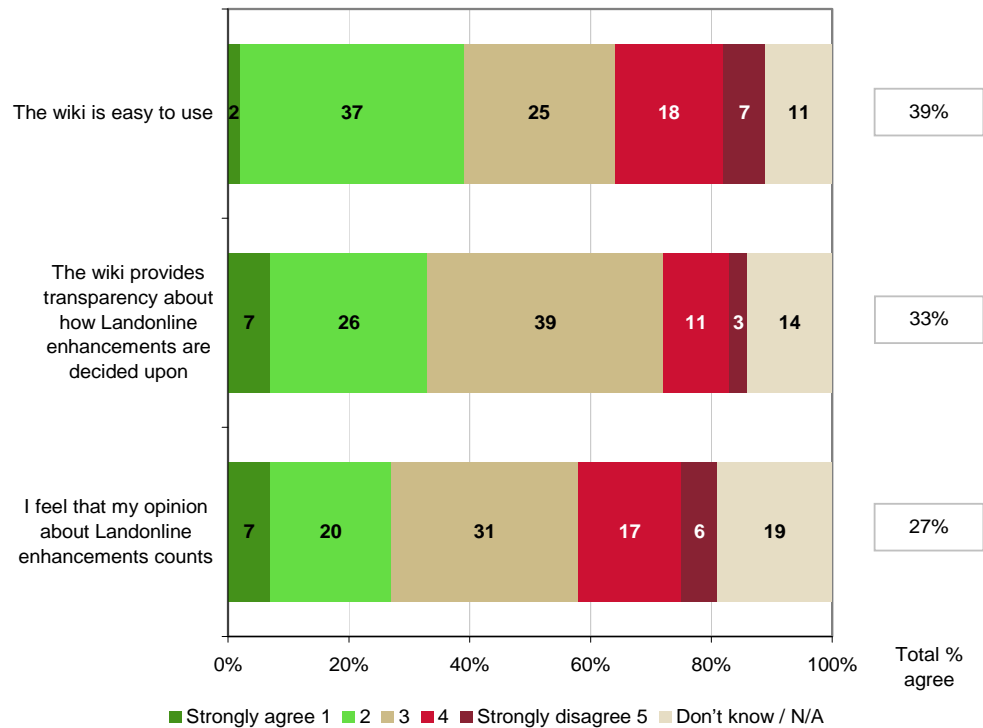
- ◆ Prior to taking part in this survey, less than one in five (19%) Landonline customers had heard of the recently launched Landonline Enhancement Wiki
 - ◆ Awareness was highest among surveyors (36%) and lowest among e-search customers (14%)
- ◆ Of those who had heard of the Wiki, 17% had accessed it.



The majority of users do not find the Landonline Enhancement Wiki easy to use

Graph 37: Attributes of the Landonline Enhancement Wiki

Q31. Please tell us how much you agree or disagree with each of the following attributes of the Landonline Enhancement Wiki



- Less than 40% of those who have accessed the Landonline Enhancement Wiki found it easy to use
- The perceived transparency of enhancement decisions and the value of customer opinions are also areas which appear to require improvement.

Sample based on those who have accessed the Wiki (84), attributes sorted by total agreement



Section 7

Opinions and expectations of LINZ

Key findings: opinions and expectations of LINZ

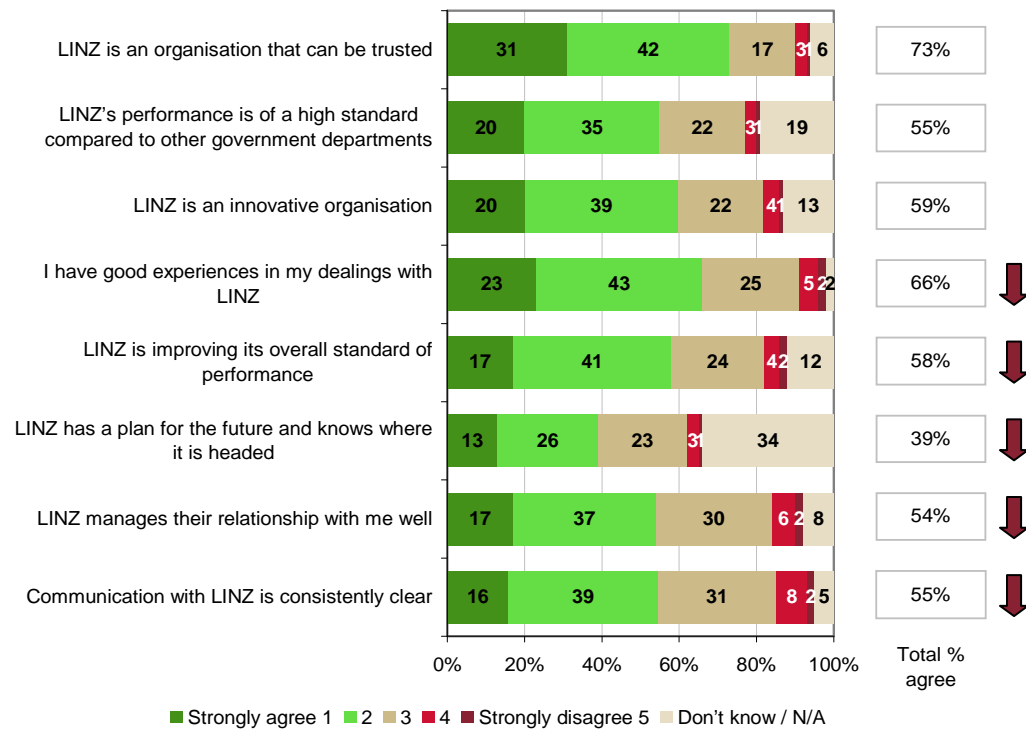
- ◆ LINZ is providing a very important service in Landonline, and is considered to be an important partner by most Landonline customers
- ◆ Customers are highly engaged: the vast majority of customers seek a close working relationship with LINZ, and like to be kept informed of developments
- ◆ Because of the complexity of the survey and title system, many customers require a great deal of support and information from LINZ in order to use Landonline effectively: this is what a “close working relationship” means to them
 - ◆ As customers’ experience with Landonline grows, their level of engagement increases and their support needs also become increasingly complex
- ◆ The survey found that LINZ has room for improvement in its management of customer relationships and its communication with customers – areas which have seen deteriorating customer perception since 2009
 - ◆ 54% agree that “LINZ manages its relationship with me well”, down from 70% in 2009
 - ◆ 55% agree that “Communication from LINZ is consistently clear”, down from 69% in 2009
 - ◆ Many surveyors and some newer customers in other sectors feel that their relationship and communication needs are not being met
 - ◆ According to many customers, meeting these needs would be achieved by providing: prompt, expert assistance with complex enquiries; easy access to information and clear communication
- ◆ Only two out of three customers (66%) are “having good experiences” in their dealings with LINZ.



Room for improvement in relationship management

Graph 38: Rating aspects of LINZ relationship – sorted by mean score

Q35. Please rate the following aspects of your relationship with LINZ using a five point scale, where 1 means “strongly agree” and 5 means “strongly disagree”



Sample based on all respondents (2467), attributes sorted by mean score

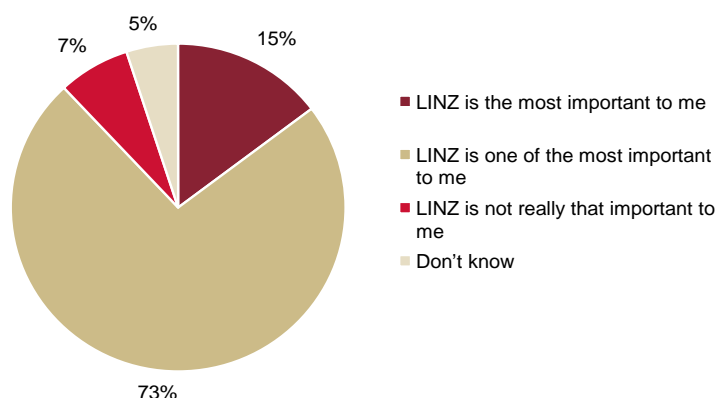
- ◆ Communication is the most obvious area for improvement when it comes to LINZ's relationship with its customers
 - ◆ This is reflected in relatively low levels of agreement with the last three attributes shown in this graph
- ◆ Of the main customer groups, conveyancers provided the most positive response to all of the attributes shown here
 - ◆ Surveyors were much less likely than conveyancers to agree with these relationship attributes, and TA customers also provided a significantly less positive response in most cases
 - ◆ 18% of surveyors disagree that “communication from LINZ is consistently clear” and 15% disagree that “LINZ is improving its overall standard of performance”.



LINZ is considered an important partner, and most customers value a close relationship

Graph 39: Importance of LINZ in comparison to other organisations

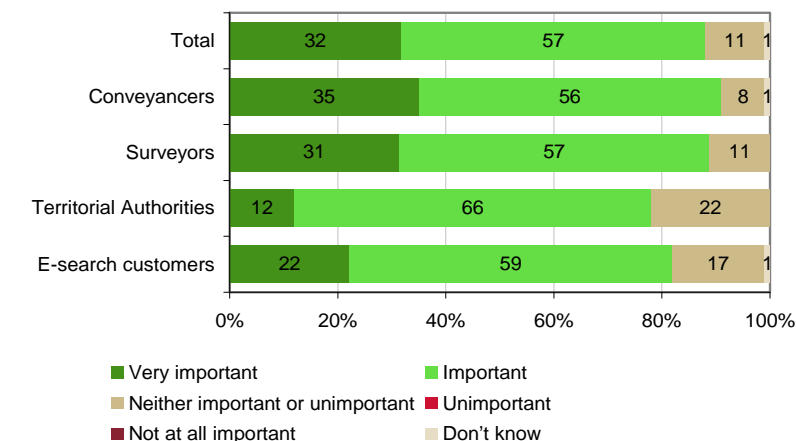
Q36. In general, how would you rate LINZ in terms of its importance to the work that you do and in comparison to other organisations you work with?



Sample based on all respondents (2467)

Graph 40: Importance of a close working relationship

Q37. How would you rate having a close working relationship with LINZ?



Sample based on those who consider it 'important' or 'very important' to have a close working relationship with LINZ (2173)

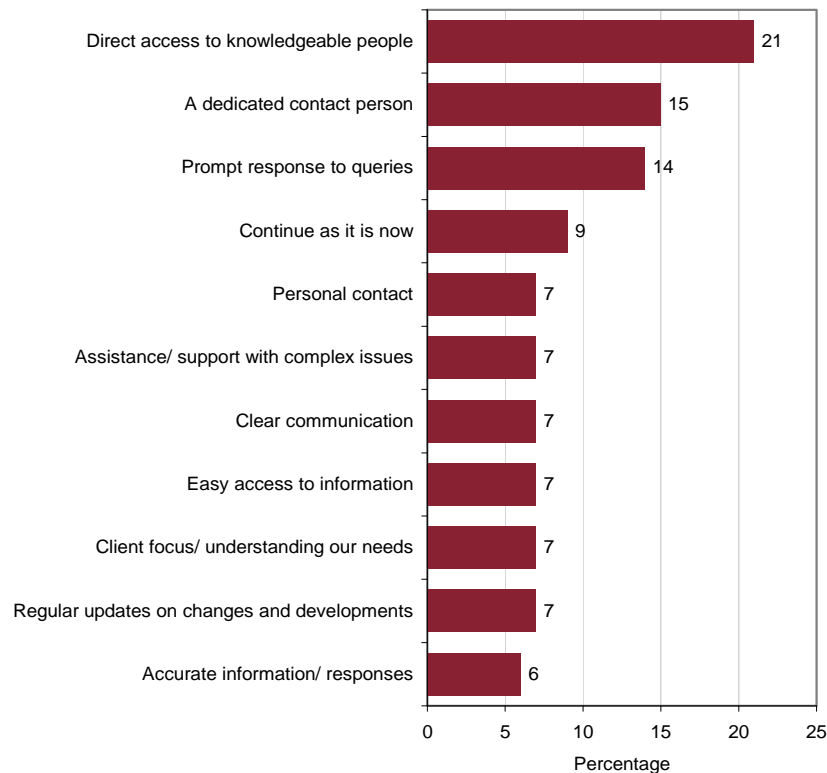
- ◆ 88% of Landonline customers stated that LINZ is the most important or one of the most important organisations they work with
 - ◆ More than 90% of conveyancers and surveyors hold this view, compared to less than 80% of TA and e-search customers
- ◆ Of those customers, 32% consider it “very important” to have a close working relationship with LINZ
 - ◆ Conveyancers and surveyors are significantly more likely to value a close working relationship with LINZ than TA or e-search customers.



A close working relationship means direct access to knowledgeable people and a prompt response

Graph 41: Elements of a close working relationship

Q38. What, in your opinion, would having a close working relationship with LINZ involve or be like?



Open-ended question, sample based on those who consider it 'important' or 'very important' to have a close working relationship with LINZ (2173)

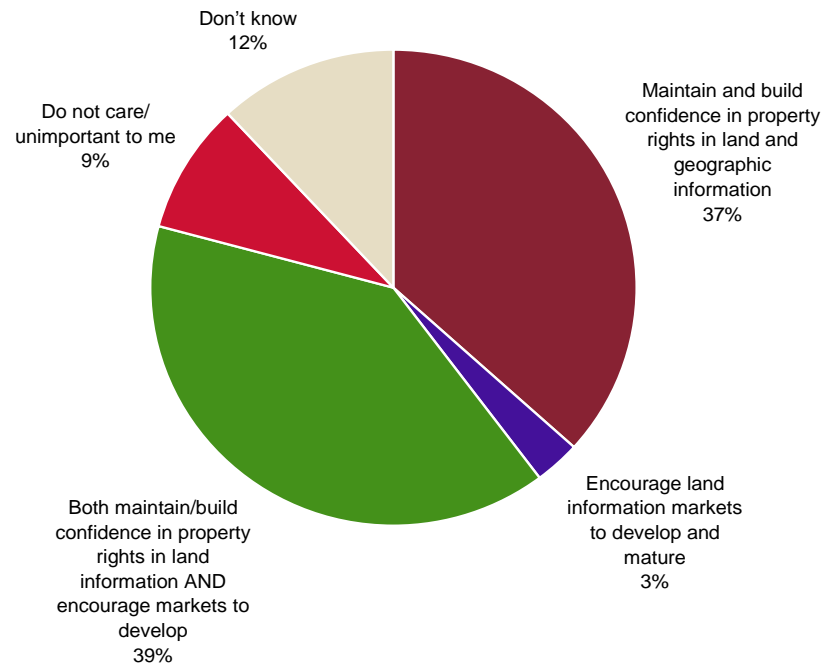
- ◆ When asked what they envisage a “close working relationship” with LINZ would be like, half of all customers expressed a need for non-automated support
 - ◆ Conveyancers and surveyors are most likely to specify a need for “direct access to knowledgeable people”, reflecting the often complex nature of their Landonline requirements
 - ◆ This need can be articulated in other ways: some customers describe their need for support as “having a dedicated contact person” (15% of all customers), some state a need for “personal contact” (7%) and others specify a need for “assistance with complex issues” (7%)
- ◆ Landonline customers want to be kept informed
 - ◆ Prompt and clear communication, a customer focus and easy access to information are also among the most frequently mentioned elements of a close working relationship.



Many customers envisage a dual focus for LINZ in the future

Graph 42: Views on LINZ's focus for the future

Q39. Which one of these do you believe should be LINZ's key area of focus in future?



Sample based on all respondents (2464)

- ◆ Respondents were asked which of the two main elements of LINZ's overall purpose should be focused on in the future
- ◆ Most Landonline customers believe LINZ should continue to focus on "maintaining and building confidence in land and geographic information"
 - ◆ 37% of customers feel that this should be LINZ's sole area of focus
- ◆ Compared to recent studies, a growing proportion (39%) of customers believe that LINZ should also "encourage land information markets to develop and mature"
 - ◆ Almost half of surveyors (48%) believe that LINZ should have this dual focus in the future.



A graphic consisting of three overlapping diamonds. The top-left diamond is red, the bottom-right diamond is a darker red, and the bottom-left diamond is a light tan color. They are arranged in a triangular pattern.

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