

## CUSTOMER SATISFACTION WITH KEY PUBLIC SERVICES



### Understand and deliver

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At the Office of Public Services Reform and across Government we are

committed to improving public services. But we won't be judged on our intentions or targets. We will be judged on whether public services have improved in the eyes of those who use them – their customers.

The purpose of this update is to give you a snapshot of the public's current verdict on the performance of public services. At the same time it identifies the factors that influence that verdict – the drivers of customer satisfaction. These findings from the front line should help the OPSR and our partners in Government to review the impact that their policies have on customer satisfaction, to help them understand and deliver. I am grateful for the work of your department in making this data available.



### Sources of satisfaction

This document summarises key points from 21 pieces of quantitative customer satisfaction surveys commissioned or collated by the Cabinet Office, Home Office, Office of the Deputy Prime Minister and the departments for Health, Transport and Education & Skills.

Key findings include:

- In most areas where we have robust data, levels of customer satisfaction with public services are not improving. Parental satisfaction with primary schools has risen in recent years. Public confidence in the police has declined.
- Direct experience of a public service has a positive impact: parents, patients and other customers are generally more satisfied than the public at large. There is one notable exception: those who have had direct contact are less likely to say the police do a good job.

- Responsiveness, reliability, empathy and assurance are all key drivers of customer satisfaction and are more important than the physical environment. In other words, responsive and empathetic public servants can achieve more than some 'tangibles' like a smart reception, which is why the 'softer' skills of good people management, staff training and development are so critical.
- Older people and women are consistently more satisfied with public services, while younger customers are most critical. Are younger people more demanding as consumers?
- In many instances where sufficient data exists to carry out area analysis, customers in London are most dissatisfied. Specifically, they are more critical of local councils, GPs, bus services and as train commuters.







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# Customer satisfaction overview

Public service	Customer satisfaction <sup>1</sup>	Direction of change <sup>2</sup>	Key drivers <sup>3</sup>	The groups least satisfied
<b>Police</b> a) <b>General public rating</b>	48% think that the police are doing a good job (BCS 2002/3)			Unemployed Men Younger Black and Minority Ethnic groups Social renters
	b) <b>Public initiated contact</b> 66% of members who initiate contact are satisfied with contact overall (MORI 2002)		Quality of treatment by staff Timeliness of appropriate response Provision of information	Younger Men Black and Minority Ethnic groups
	c) <b>Victims of crime</b> In 59% of incidents victims are satisfied (BCS 2002/3)	Down to 2000, level since then 		Men, Younger, Black, Social renters, Victims of mugging/acquaintance violence, vandalism
<b>Schools</b> a) <b>Parents</b>	82% of parents of children at primary school rate primary education as good (DfES 2002)	Primary 		No consistent differences
	69% of parents of children at secondary school rate state secondary education as good (DfES 2002)		Secondary in London: Quality of teaching, Pupil behaviour, Heads and deputies	No consistent differences
<b>b) Children</b>	84% of 7 to 11 year olds and 72% of 11 to 16 year olds 'like learning in school' (DfES 2002/3)			Boys, Secondary pupils DE
<b>Transport</b> a) <b>Trains</b>	74% of passengers satisfied with their previous journey (SRA NPS 2003)		Reliability, Delays, Journey time	Commuters London/South East
	b) <b>Buses</b> Average overall evaluation of previous journey 80 out 100 (DfT BQIs 2002/03)		Reliability, Frequency, Vehicle quality	Younger, ABC1, Full-time workers, London
	c) <b>London Underground</b> Average overall evaluation of previous journey 78 out of 100 (LU 2003)		Journey time, On-train security, Station security	

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<b>Health</b>				
a) GP patients	79% of recent patients satisfied with GP service (DH 2002)		Quality of care, Dialogue with GPs, Appointments	Younger, London Black and Minority Ethnic groups
b) In-patients	71% of recent patients satisfied with in-patients service (DH 2002)		Quality of care, Admission arrangements, Explanations	
c) Out-patients	65% of recent patients satisfied with out-patients service (DH 2002)			
d) A&E	52% of recent patients satisfied with their last visit (DH 2002)			
<b>Local government</b>				
	65% satisfied with their local authority overall (2000/1 BVPIs) Range in terms of satisfaction with services: 86% satisfied with waste collection 63% with cleansing – keeping land clear of litter (2000/1 BVPIs)	<sup>4</sup> 	ODPM currently scoping an annual survey to test key drivers of satisfaction with local government	Younger, Black and Minority Ethnic groups, Non-users, Residents in London Boroughs

## Headline findings (for PowerPoint slides of key customer data: <http://www.cabinet-office.gsi.gov.uk/opsr/customers.htm>)

### Police

- Public confidence in the police has fallen recently continuing a trend apparent for the past two decades
- Victim satisfaction with the way the police dealt with their incident decreased during the 1990s and has been level since 2000
- As is often the case, the public rate their local police slightly more highly than they rate the police nationally
- Those who have had any recent contact with the police are less confident that they do a good job; an unusual finding for a public service

### Education

- The majority of children enjoy learning and feel their school is good
- However, many secondary pupils from social class DE, particularly boys, feel school work is dull
- Parents are satisfied with secondary and, in particular, primary education. Satisfaction with the latter has risen over the last few years
- In London, parents rate their own child's school highly, but have a much lower opinion of other schools in their Borough and of schools in London as a whole

### Transport

- Other than a drop post Hatfield, particularly in ratings of reliability, passenger ratings of their most recent train journey have remained constant over recent years
- Commuters in London and the South East are much less satisfied than the rest
- Passengers' overall appraisal of the railway system is much lower than their rating of the last rail journey
- Satisfaction with buses has remained fairly stable over recent years. Despite increases in London, passenger satisfaction remains lower in the capital than in metropolitan shire areas
- Satisfaction with London Underground has remained relatively stable for the last 10 years or so, following increases during the early 1990s

### Health

- Among both the public as a whole as well as patients, GPs are one of the most highly rated services and A&E least highly
- Patients' rating of the care they receive in hospital is very high – higher than their overall satisfaction with these services
- Acceptable standards for patients are to wait no longer than one day for a GP appointment, to normally see the same GP and to wait in reception for 10 minutes or less. If those standards are not met, satisfaction declines notably

### Local government

- Local residents are most satisfied with district councils and are least satisfied with their local authority in London
- Of local government services, residents are most satisfied with waste collection and less satisfied with cleansing services

1 In this summary we report the 'top two box' score, i.e. the proportion who say either very or fairly satisfied, very or fairly good etc. in a number of different surveys.

2 Where we have consistent trend data.

3 Most relevant statistical analysis is shown.

4 Indicative finding from available evidence: ad hoc MORI surveys of the general public as well as the People's Panel show declining levels of satisfaction with local government. Results of the second suite of the Best Value surveys, due spring 2004, will provide a more robust evidence base.

# Analysing customer satisfaction – key driver analysis and customer segmentation

In order to make customer satisfaction data actionable, we need to understand which factors have greatest impact on customers' overall evaluation of the service they receive: what are the key drivers of customer satisfaction?

Much work has been done to establish the key components of service quality. A study by Peter Doyle of Value Based Marketing identified the following, shown in order of importance:

- administrative competence/product service/reliability;
- prompt service/responsiveness;
- knowledge and courtesy of employees;
- empathy; and
- physical facilities

These are reflected in the table below which summarises the top three drivers of satisfaction for the police, transport, education and health services:

Based on those who have recently used or benefited from public services, the table below highlights which groups are currently most satisfied and which most critical.

## What drives customer satisfaction with public services?

	1st Driver	2nd Driver	3rd Driver
<b>Police</b>	Quality of treatment by staff	Timeliness of appropriate response	Provision of information
<b>Buses</b>	Reliability	Frequency	Vehicle quality
<b>Trains</b>	Punctuality/reliability	Dealing with delays	Scheduled length of journey
<b>London Underground</b>	Journey time	On-train security	Station security
<b>In-patients</b>	Quality of care	Admission arrangements	Explanation given by staff
<b>GPs</b>	Quality of care	Friendliness of staff	Explanations given by staff
<b>Secondary schools (London parents)</b>	Quality of teaching	Pupil behaviour	Heads and deputies
It can also be instructive to identify the drivers of <b>dissatisfaction</b> , for example:			
<b>GPs</b>	Difficulty getting an appointment	Did not listen	Waited too long

## Which customers are most satisfied with public services?<sup>1</sup>

	Most satisfied	Least satisfied
<b>Police</b>	More affluent, Older, Women	Younger, Men, Black and Minority Ethnic groups, Social renters
<b>GP</b>	Older	Younger, London, Black and Minority ethnic groups
<b>Hospitals</b>	Female, Older, C2DE	Younger, ABC1
<b>Buses</b>	Female, Older, C2DE	Younger, ABC1, Full-time workers, London
<b>Trains</b>	Female, Older, DE	Middle-aged, ABC1, Commuters journey time more than an hour
<b>Schools (children)</b>	Girls, Primary level, AB	Boys, Secondary level, DE
<b>Local Council</b>	Older Female District Council Service users	Younger Black and Minority Ethnic groups London Boroughs Non-users

<sup>1</sup> We highlight major differences in levels of satisfaction from an analysis of different surveys. Due to sample size, few datasets are sufficiently robust to allow us to analyse by all different groups. In particular, we cannot always tease out differences by area or ethnicity.