

## Customer Satisfaction With Key Public Services



### A better service for customers

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"The ultimate judgement about the success of service reform will be made by the public and their experience of better quality services. To deliver that outcome, the real nature of the customer experience needs to be understood and built into the way we make policy, design and deliver services and judge their performance. Data is an essential starting point. In this bulletin, we summarise the current position on satisfaction levels of patients, students, victims and other customers of public services.

Overall, there is little change in previous trends. The achievement of delivery targets is not yet translated into upturns in satisfaction. This highlights the need to understand and address the factors which create a positive customer experience. In this bulletin, we also report research we commissioned to identify the key drivers of satisfaction. These are delivery, timeliness, information provision, staff professionalism and staff attitude. Increased attention to these drivers at all levels should lead to much sharper upturn in customer satisfaction."

### General Trends

Overall, recent trends are not dramatic: the step changes in some other aspects of public service delivery are not translated into similar upturns in satisfaction.

For public service decision makers and managers, these results may be somewhat discouraging given real recent achievement in meeting targets for public service improvement: improvements to access and waiting in health, greater police numbers and reduced crime, more teachers and better GCSE results. Several suggestions have been made to explain the apparent gap between public and customer perceptions and the reality of public service improvements, including lack of widespread awareness of improvements which affect only a minority of the population, and the influence of factors which have nothing to do with public services.

Whatever the reasons, these trends highlight the need to understand better, the factors which create customer satisfaction and dissatisfaction and work to improve the customer experience of public services.

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# Customer Satisfaction With Key Public Services

## Trends in specific services, localities and institutions

Whilst the decline in customer ratings of the police we saw for much of the last couple of decades is now arrested, the trend is not yet positive, and below ratings by the public generally. Overall satisfaction with local government is in decline, although trends in satisfaction with specific local authority services are mixed. Other than a noticeable dip post-Hatfield, passenger ratings of most transport services have been constant. In school, where the evidence base is least well established, there may have been some rises in parental ratings, particularly of primary schools. In health, there is some evidence of modest improvements across a number of different services.

Where data exists, there is a wide range in customer satisfaction ratings in different localities. In health, in-patient ratings of quality of care vary from 95% 'excellent' or 'very good' in Papworth and the Royal Marsden to 51% in Newham. In local government 'Best Value Satisfaction Surveys', the range is from 78% in the City of London to 27% in Rossendale. Whilst we must of course take account of extraneous factors such as the type of areas they serve, this does not account for all the difference in ratings. There are clearly under performers as well as high-performing organisations.

## The need for action

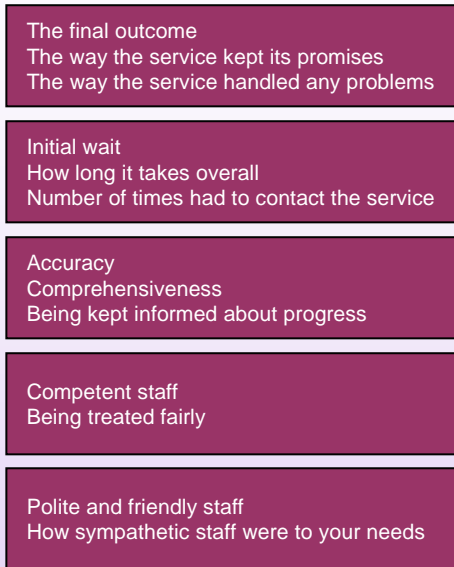
For the surveys to lead to action, we need data at local management unit level, a robust customer segmentation and an understanding of key drivers of a positive customer experience.

If we are to provide personalised services around the needs of individuals, it is important to develop a greater understanding of the needs and levels of satisfaction of the different groups of customers we serve. From the data currently available, there are some clear patterns. Least satisfied groups are frequently younger, based in London and from black and minority ethnic communities. We need to establish the reasons for these differences such as increased pressure on resources, different levels of customer expectations in order to redesign services to better meet their needs.

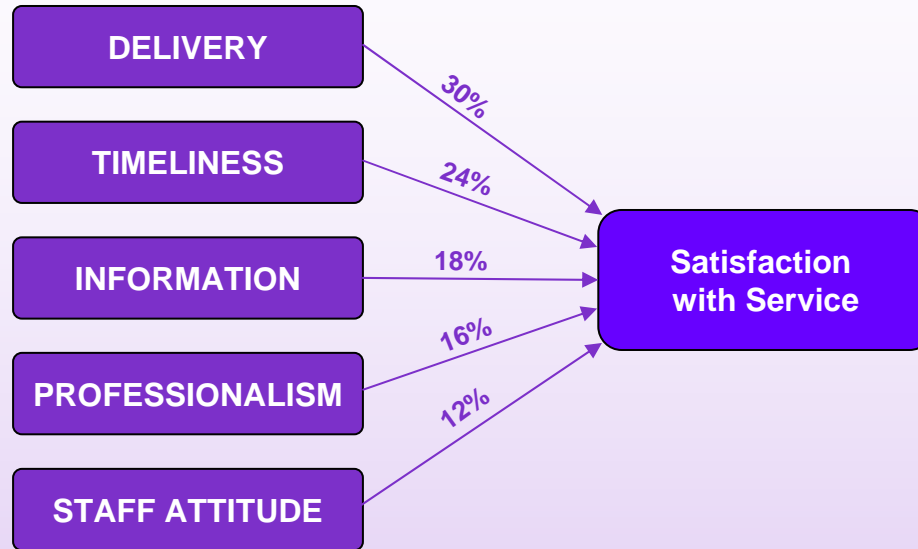
Furthermore, if we are to transform customer experience of public services, we need a solid understanding of what makes for a positive service experience. Also included in this bulletin is MORI research commissioned by OPSR on common drivers of customer satisfaction. Our survey reveals that five factors are most important to customers across a wide range of public services. Most important is delivery, not just in terms of delivering a final outcome, but in being perceived to keep promises and recovery when things go wrong. This is followed, in rank order, by timelines, information, professionalism and staff attitude. We need to ensure that focus on delivery is supported by clear understanding of customers and attention to the factors which drive satisfaction if we are to see improvement in these figures over the next twelve months.

# Analysing Customer Satisfaction

## Main Elements



## 5 DRIVERS



This model explains 67% of the variation in satisfaction

Source: MORI

## What drives customer satisfaction with public services?

This is the first attempt to gain an overall picture of the factors which make customers satisfied or not, and to ascertain whether there are common factors across services. If there are common drivers (as has been found in other countries) then knowledge and understanding of these could be extremely useful at all levels of public service management.







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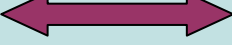





promises and recovery when things go wrong. This is followed, in rank order, by timeliness, information, professionalism and staff attitude.

This framework is robust and whilst individual services also have their own drivers, it should provide a useful tool throughout public services for understanding customer responses. It may point to the need to ensure that all five major drivers are addressed in policy making if we wish to ensure that customers are satisfied with the services they receive.

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# Customer Satisfaction Overview

| Public Service                                 | Customer Satisfaction  | Direction of Change   | Key Drivers   | Most Satisfied   | Least Satisfied  |
|--|--|---|---|--|--|
| <b>Police</b><br>a) General Public Rating      | 75% think that police are doing a good job (BCS 2002/03)   | Down to 2001/2002, level since then<br>      |   | <ul style="list-style-type: none"> <li>• Older</li> <li>• Women</li> <li>• White</li> </ul>                                      | <ul style="list-style-type: none"> <li>• Unemployed</li> <li>• Men</li> <li>• Younger</li> <li>• BME</li> <li>• Social Renters</li> </ul>                            |
| b) Public initiated contact                    | 66% of members of public who initiate contact are satisfied with contact overall (MORI 2002)           |    | <ul style="list-style-type: none"> <li>• Quality of treatment by staff</li> <li>• Timeliness of appropriate response</li> <li>• Provision of information</li> </ul> | <ul style="list-style-type: none"> <li>• Older</li> <li>• Women</li> <li>• White</li> </ul>                                      | <ul style="list-style-type: none"> <li>• Younger</li> <li>• Men</li> <li>• BME</li> </ul>  |
| c) Victims of Crime                            | In 58% of incidents victims are satisfied (BCS 2003/04)  | Down to 2002, broadly level since then<br>   |   | <ul style="list-style-type: none"> <li>• Older</li> <li>• Women</li> </ul>   | <ul style="list-style-type: none"> <li>• Younger</li> <li>• Men</li> <li>• Black</li> <li>• Social Renters</li> <li>• Victims of violence &amp; vandalism</li> </ul> |
| <b>Schools</b><br>a) Parents – Primary Schools | 84% of parents of children at primary school rate primary school education as good (DfES STS Nov 2003) | Some rises to 2002, but plateauing since<br> |   | <ul style="list-style-type: none"> <li>• Women</li> </ul>  | <ul style="list-style-type: none"> <li>• Men</li> </ul>  |
| b) Parents – Secondary Schools                 | 68% of parents of children at secondary school rate secondary education as good (DfES STS Nov 2003)    | Perhaps some rises but less clear cut<br>  | In London: <ul style="list-style-type: none"> <li>• Quality of teaching</li> <li>• Pupil Behaviour</li> <li>• Heads &amp; Deputies</li> </ul>                       | <ul style="list-style-type: none"> <li>• C2DE</li> </ul>   | <ul style="list-style-type: none"> <li>• ABC1</li> </ul>   |
| c) Children                                    | 84% of 7-11 year olds and 72% of 11-16 year olds 'like learning in school' (DfES Jun 2003)             |   |   | <ul style="list-style-type: none"> <li>• Girls</li> <li>• Primary</li> <li>• AB</li> </ul>                                       | <ul style="list-style-type: none"> <li>• Boys</li> <li>• Secondary</li> <li>• DE</li> </ul>  |
| d) Further Education                           | 90% of FE learners satisfied with learning experience (National Learner Satisfaction Survey 2002/03)   |    | <ul style="list-style-type: none"> <li>• Teaching/Training</li> <li>• Choice of course</li> <li>• General facilities</li> </ul>                                     | <ul style="list-style-type: none"> <li>• Women</li> <li>• White</li> <li>• With Disabilities</li> <li>• With Children</li> </ul> | <ul style="list-style-type: none"> <li>• Younger</li> <li>• Indians/Asians</li> <li>• Those taking GNVQ/A/AS levels</li> </ul>                                       |

| Public Service                  | Customer Satisfaction  | Direction of Change  | Key Drivers  | Most Satisfied  | Least Satisfied  |
|---------------------------------|--|--|--|---|--|
| <b>Transport</b><br>a) Trains   | 73% of passengers satisfied with their previous journey (SRA NPS Spring 2004)  |   | <ul style="list-style-type: none"> <li>Reliability</li> <li>Delays</li> <li>Journey Time</li> </ul>                      | <ul style="list-style-type: none"> <li>Female</li> <li>Older</li> <li>DE</li> </ul>                                       | <ul style="list-style-type: none"> <li>Commuters</li> <li>London/South East</li> </ul>   |
| b) Buses                        | Average evaluation of previous journey 80 out of 100 (DfT BQIs Q3 2003/04)   |   | <ul style="list-style-type: none"> <li>Reliability</li> <li>Frequency</li> <li>Vehicle Quality</li> </ul>                | <ul style="list-style-type: none"> <li>Female</li> <li>Older</li> <li>C2DE</li> </ul>                                     | <ul style="list-style-type: none"> <li>Younger</li> <li>ABC1</li> <li>Full-time workers</li> <li>London</li> </ul>               |
| c) London Underground           | Average evaluation of previous journey 78 out of 100 (LU Customer Satisfaction Survey Q4 2003/04)  |   | <ul style="list-style-type: none"> <li>Journey Time</li> <li>On-train security</li> <li>Station Security</li> </ul>      |   |  |
| <b>Health</b><br>a) GP patients | 84% of recent patients satisfied with service on last visit to GP (DH 2003)  |   | <ul style="list-style-type: none"> <li>Quality of care</li> <li>Dialogue with GP's</li> <li>Appointments</li> </ul>      | <ul style="list-style-type: none"> <li>Older</li> <li>White British</li> <li>Left Education at 16</li> </ul>              | <ul style="list-style-type: none"> <li>Younger</li> <li>London BME</li> <li>Post 16 Education</li> </ul>                         |
| b) In-Patients                  | 77% of recent patients satisfied with service on last visit to in-patients (DH 2003)   | <br>Small improvement in rating of care                   | <ul style="list-style-type: none"> <li>Quality of care</li> <li>Admissions arrangements</li> <li>Explanations</li> </ul> | <ul style="list-style-type: none"> <li>Older</li> <li>Men</li> <li>White British</li> <li>Left Education at 16</li> </ul> | <ul style="list-style-type: none"> <li>Younger</li> <li>BME</li> <li>Women</li> <li>Post 16 education</li> <li>London</li> </ul> |
| c) Out-Patients                 | 81% of recent patients satisfied with service on last visit to out-patients (DH 2003)  |   |  | <ul style="list-style-type: none"> <li>Older</li> <li>Men</li> <li>White British</li> </ul>                               | <ul style="list-style-type: none"> <li>Younger</li> <li>BME</li> <li>Women</li> <li>London</li> </ul>                            |
| d) A&E                          | 71% of recent patients satisfied with service on last visit (DH 2003)  | Possible improvement in 2002, plateauing since then<br> |  | <ul style="list-style-type: none"> <li>Older</li> <li>Men</li> <li>White British</li> <li>Left Education at 16</li> </ul> | <ul style="list-style-type: none"> <li>Younger</li> <li>BME</li> <li>Women</li> <li>Post 16 education</li> <li>London</li> </ul> |
| <b>Local Government</b>         | 55% satisfied with their local authority overall (2003/04 BVPIs)<br>Range in terms of satisfaction with services:<br><ul style="list-style-type: none"> <li>84% satisfied with waste collection</li> <li>60% satisfied with cleansing – keeping land free of litter (2003/04 BVPIs)</li> </ul> |   | ODPM currently scoping an annual survey to test key drivers of satisfaction with local government                        | <ul style="list-style-type: none"> <li>Older</li> <li>Female</li> <li>District Council</li> </ul>                         | <ul style="list-style-type: none"> <li>Younger</li> <li>BME</li> <li>Residents in London Boroughs</li> </ul>                     |

# Headline Findings

## Police

Public confidence in the police fell markedly in the 1980s and 1990s, and has been stable for the last two years.

Similarly, 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 more highly than they rate police nationally

People with 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 rose in the late 90s and early 00s, and may now have reached a plateau.

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 the ratings of reliability, passenger ratings of their most recent 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 or shire areas.



## Health

GPs remain the best rated services, followed by in- and out-patient services and then A&E.

There have been some encouraging shifts recently, e.g. increased satisfaction with choice of time and location of treatment, time spent waiting at hospital and time to get a GP appointment.

In-patients' overall rating of the care they receive has increased slightly.

Patient experience surveys show younger patients and women are least positive. Patients from BME communities, particularly Asian, are also most critical.



## Local Government

Overall satisfaction with local authorities has dropped notably over the past three years.

There have been some small declines in key environmental services - street cleaning and refuse collection - but not sufficient to explain the whole decline in overall satisfaction. A number of other services have increased satisfaction over recent years, for example parks and open spaces.

Authorities with a higher CPA rating have higher overall levels of satisfaction.



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