



Understanding what Customers Want

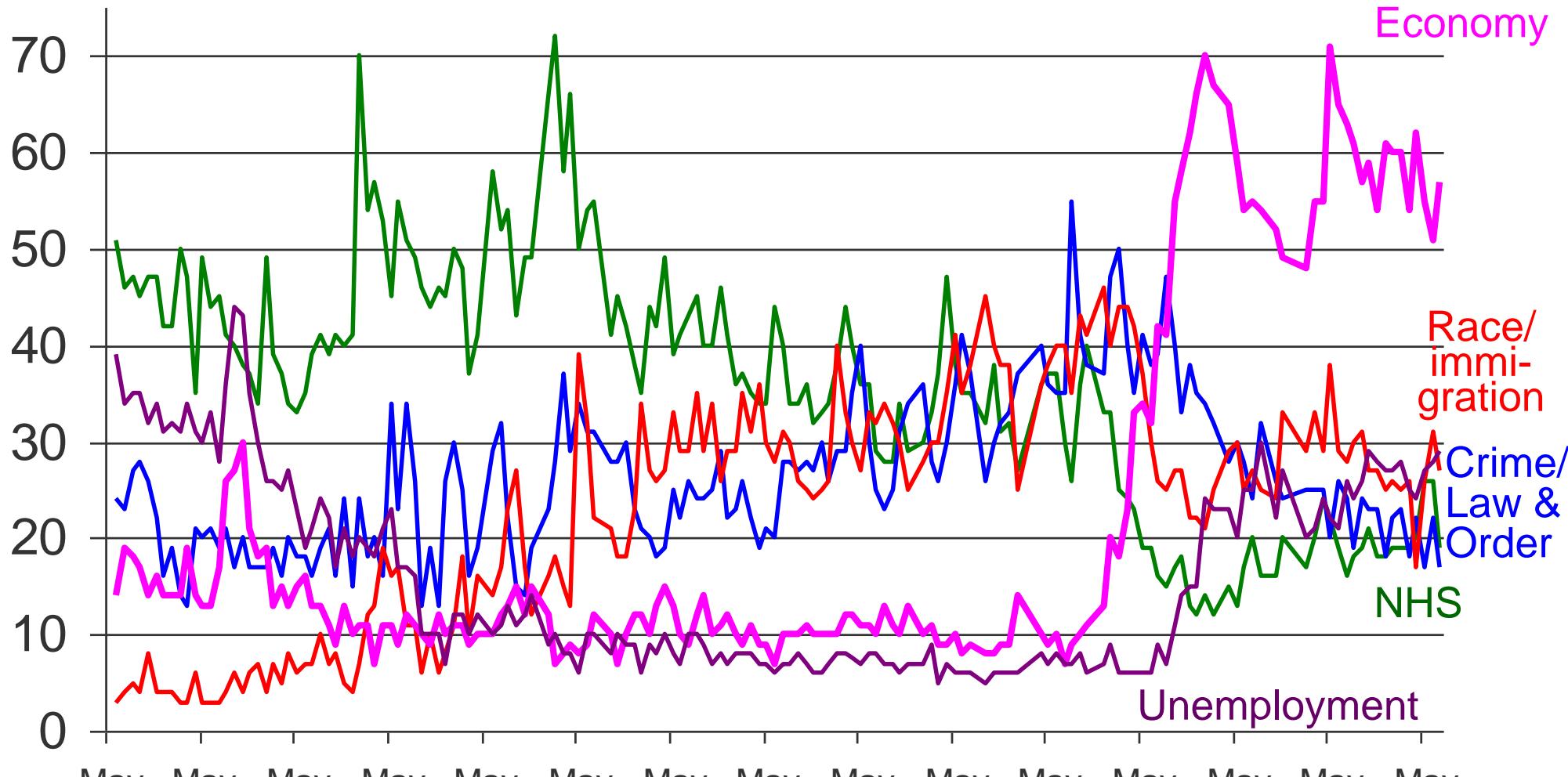
Ben Page

Chief Executive, Ipsos MORI

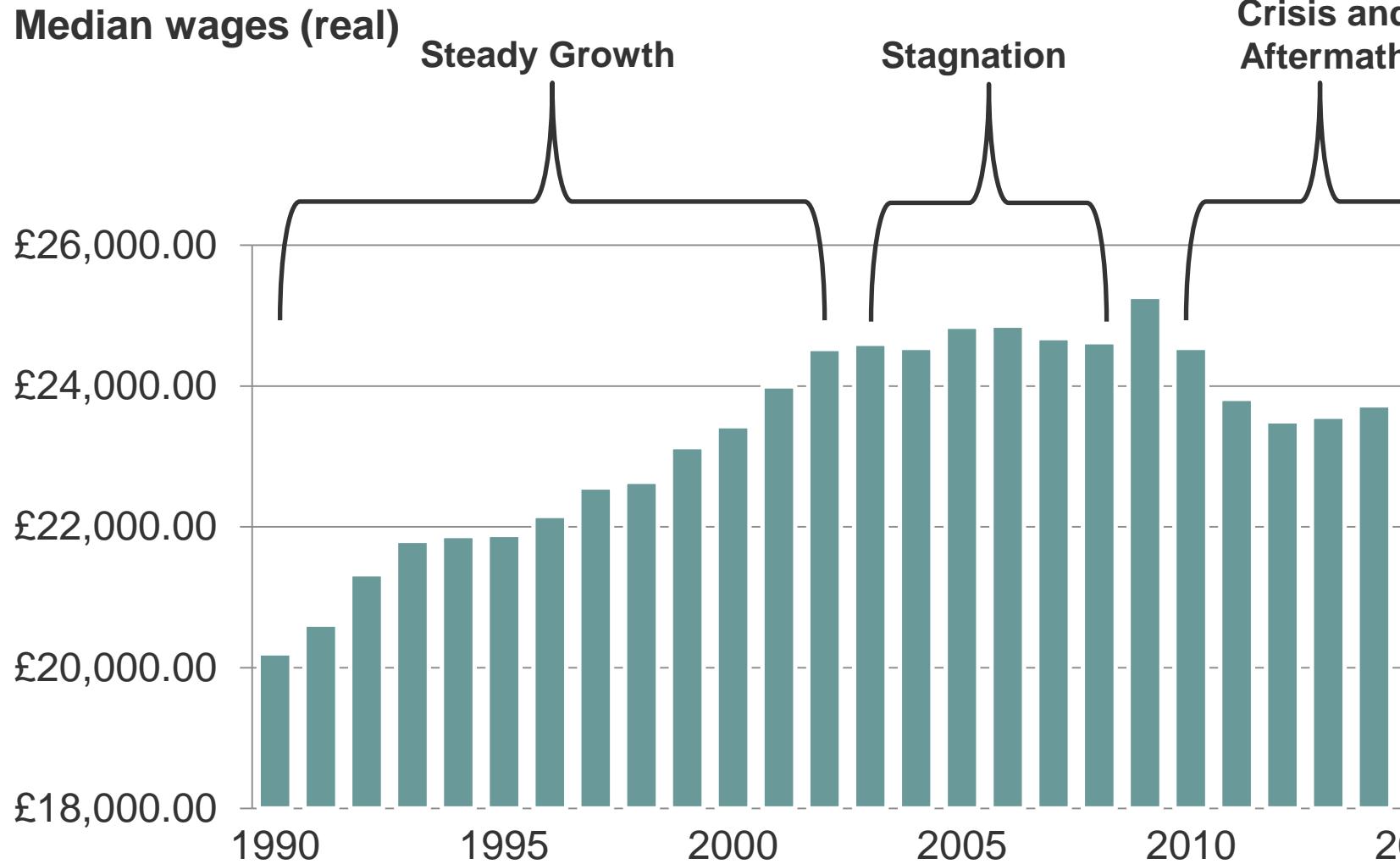
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The dismal science predominates

What do you see as the most/other important issues facing Britain today?



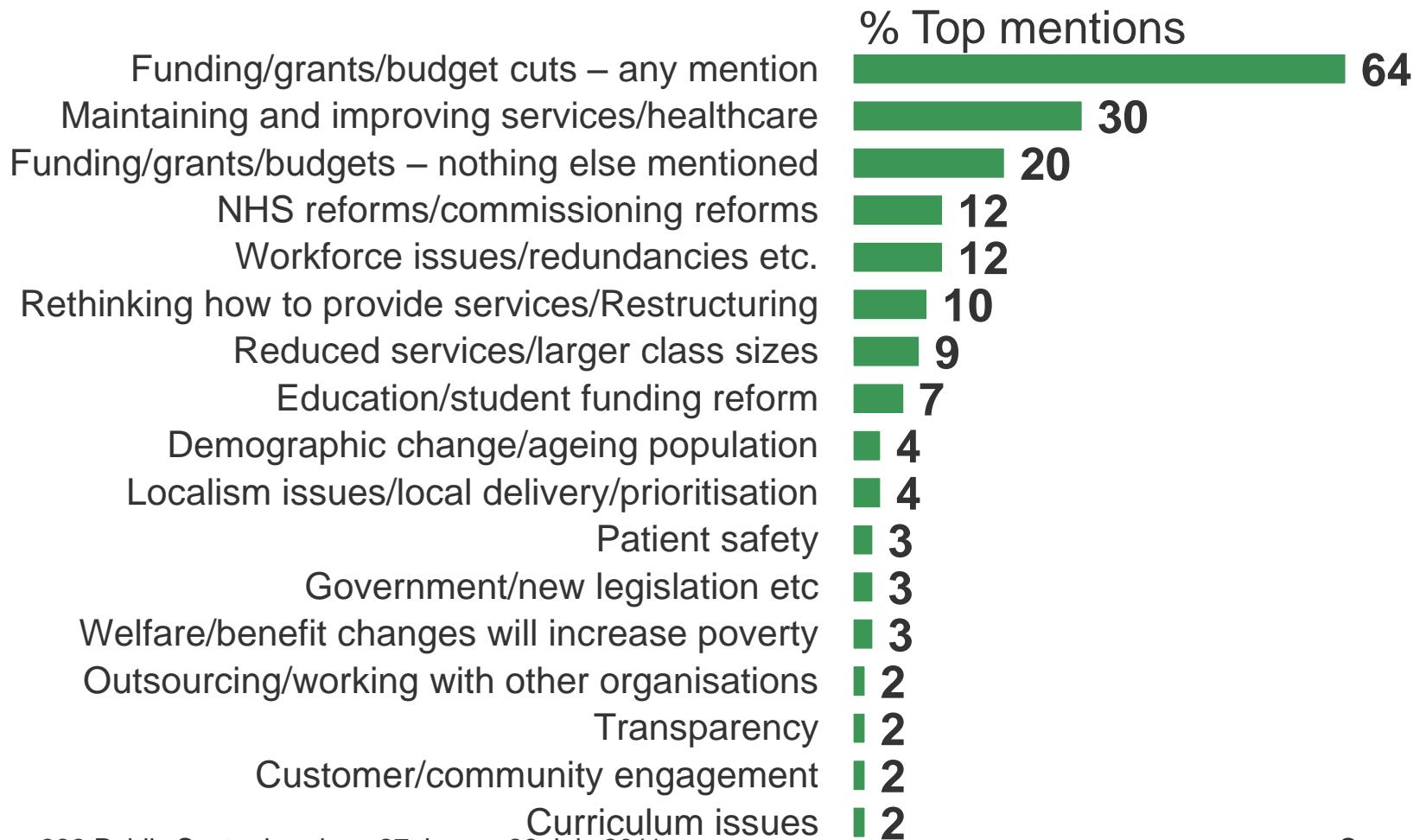
More than a lost decade for wages



Source: Resolution Foundation

Money money money

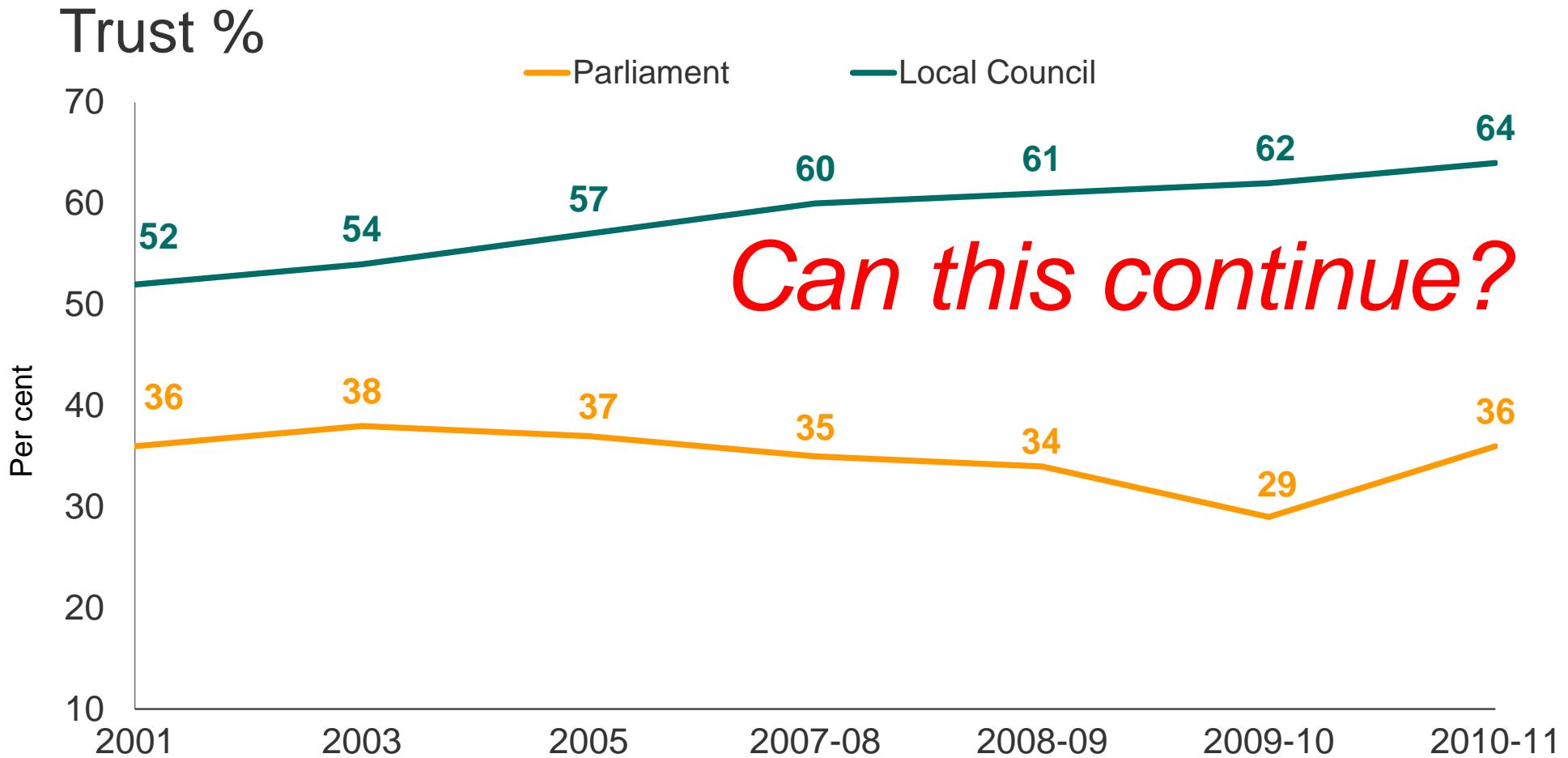
What would you say is the most important issue facing your sector today?



Base: 338 Public Sector Leaders, 27 June – 22 July 2011

Source: Ipsos MORI

It's not all bad... satisfaction with councils is UP and...



So what do they want to hear??

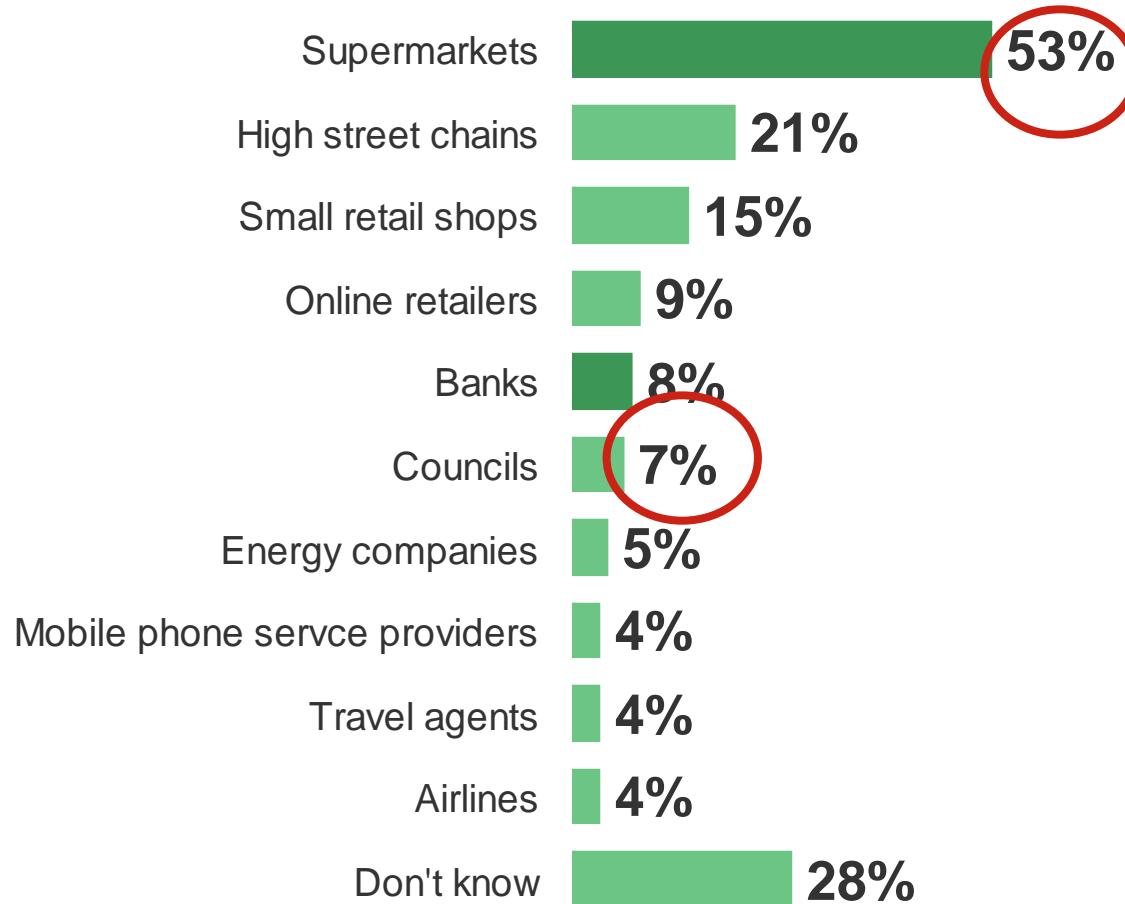
WEFMI



Empathy

Supermarkets seen to have responded best to economic downturn in terms of how they treat their customers

Q Which industries, if any, would you say have responded particularly well to the economic downturn in the way they treat their customers (Multichoice)



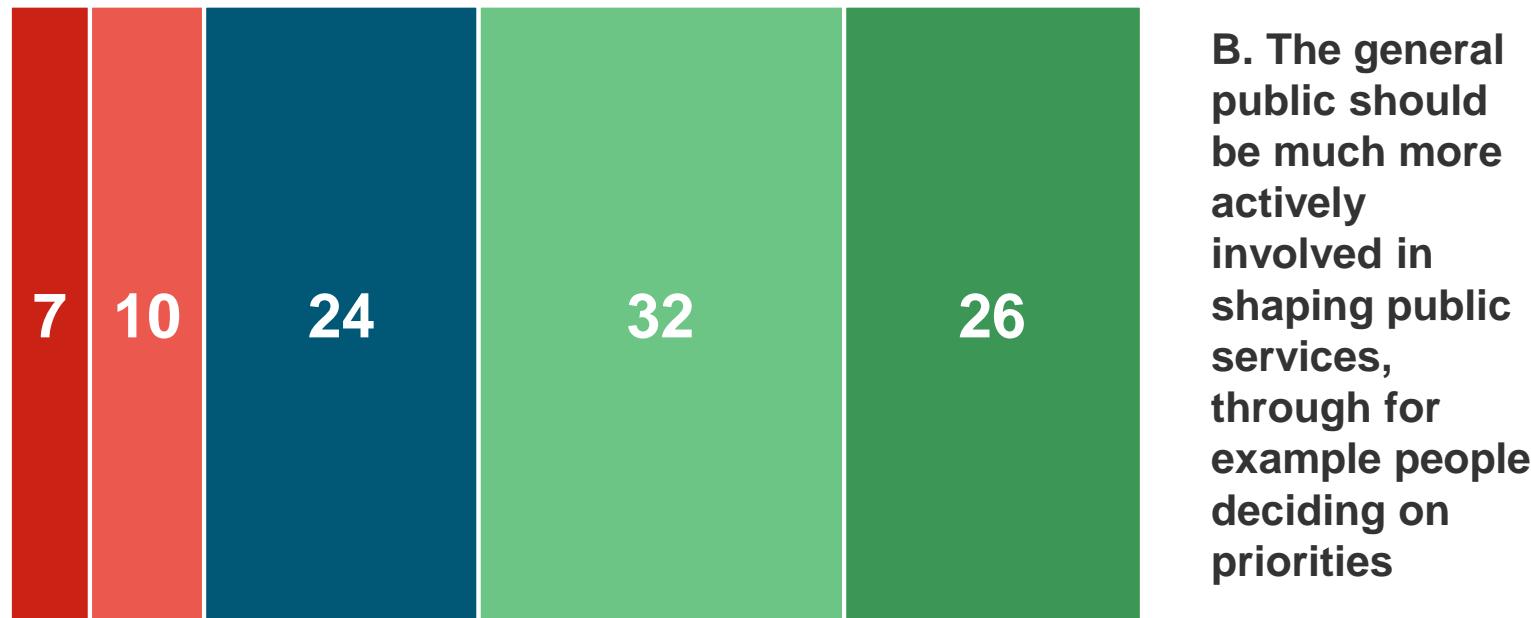
Responded
well to
economic
downturn

**People like idea of
more local control –
but they're also
worried about it**

In favour of more public control...

Please read each pair of statements and decide which comes closest to your own opinion

- 1 - agree much more with A
- 2
- 3
- 4
- 5 - agree much more with B

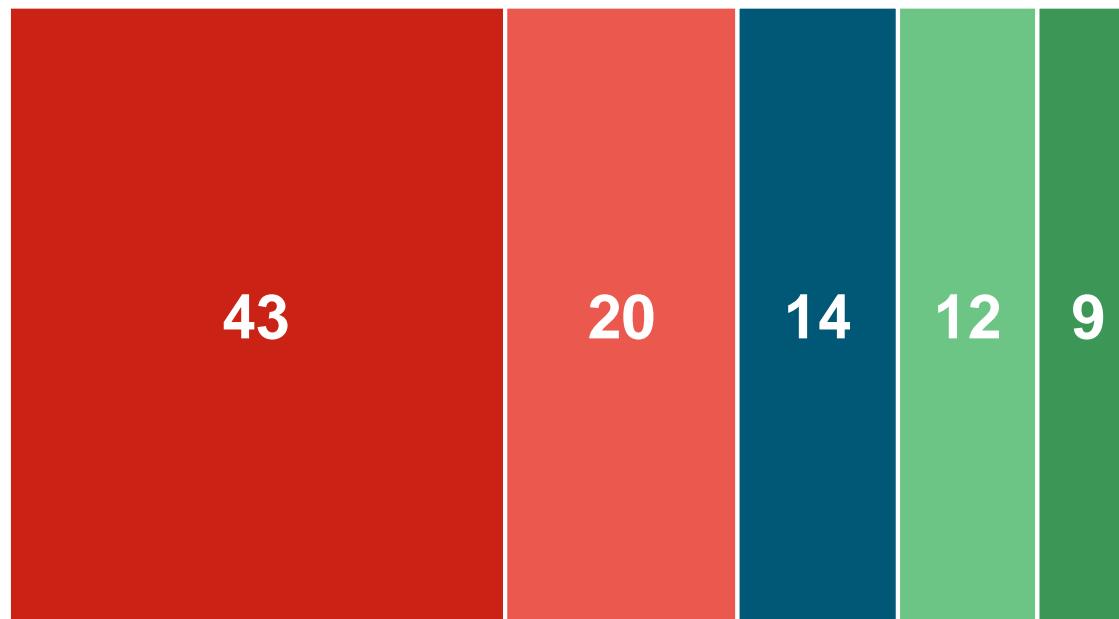


...but want services to be the same everywhere!!!

Please read each pair of statements and decide which comes closest to your own opinion

- 1 - agree much more with A
- 2
- 3
- 4
- 5 - agree much more with B

A. Standards of public services should be the same everywhere in Britain



B. The people who live in different parts of Britain should be able to decide for themselves what standard of public services should be provided in their area

And that's all services...

Q Please can you tell me which of these statements comes closest to your own opinion:

...should be the same
everywhere in Britain

■ people should be able to
decide for themselves how
... is provided in their area

The health
service

81%

18%

Recycling

70%

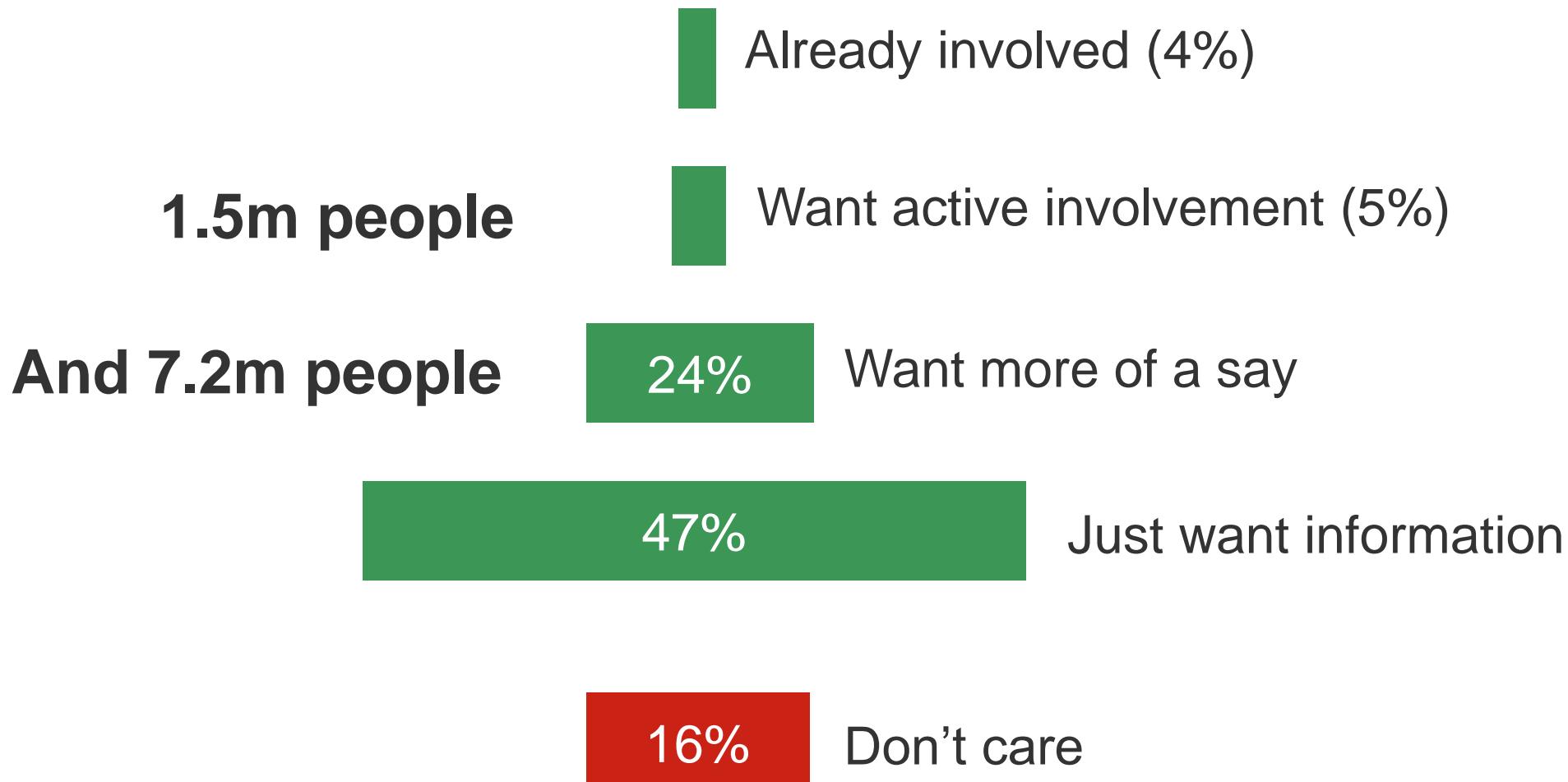
29%

Cognitive polyphasia...

**Need to be realistic
about what we
expect from people**

Be realistic about what people themselves will do – there is no “ladder of involvement”...

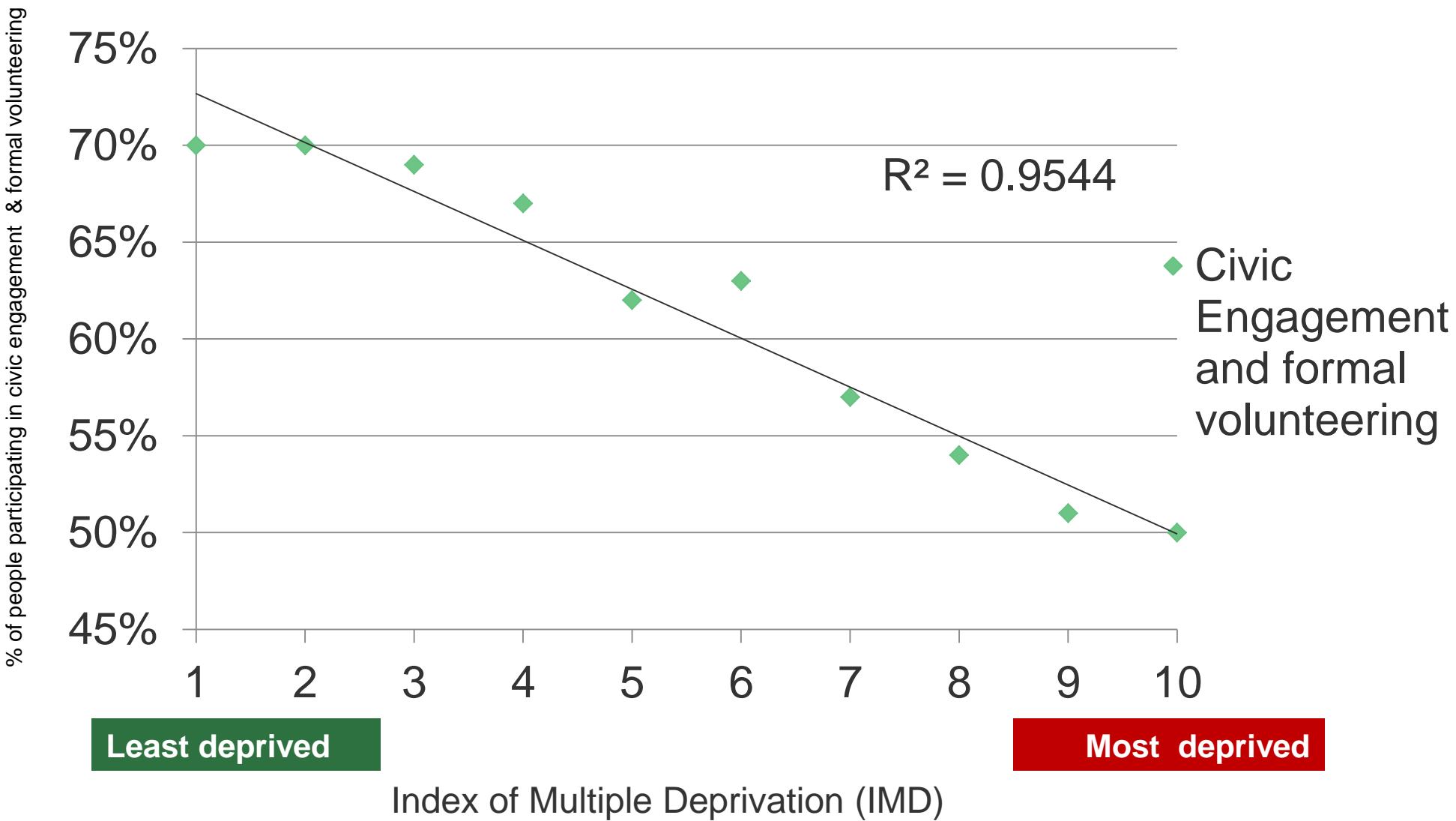
Levels of involvement/interest in involvement in local services



Some already responding in their own way...

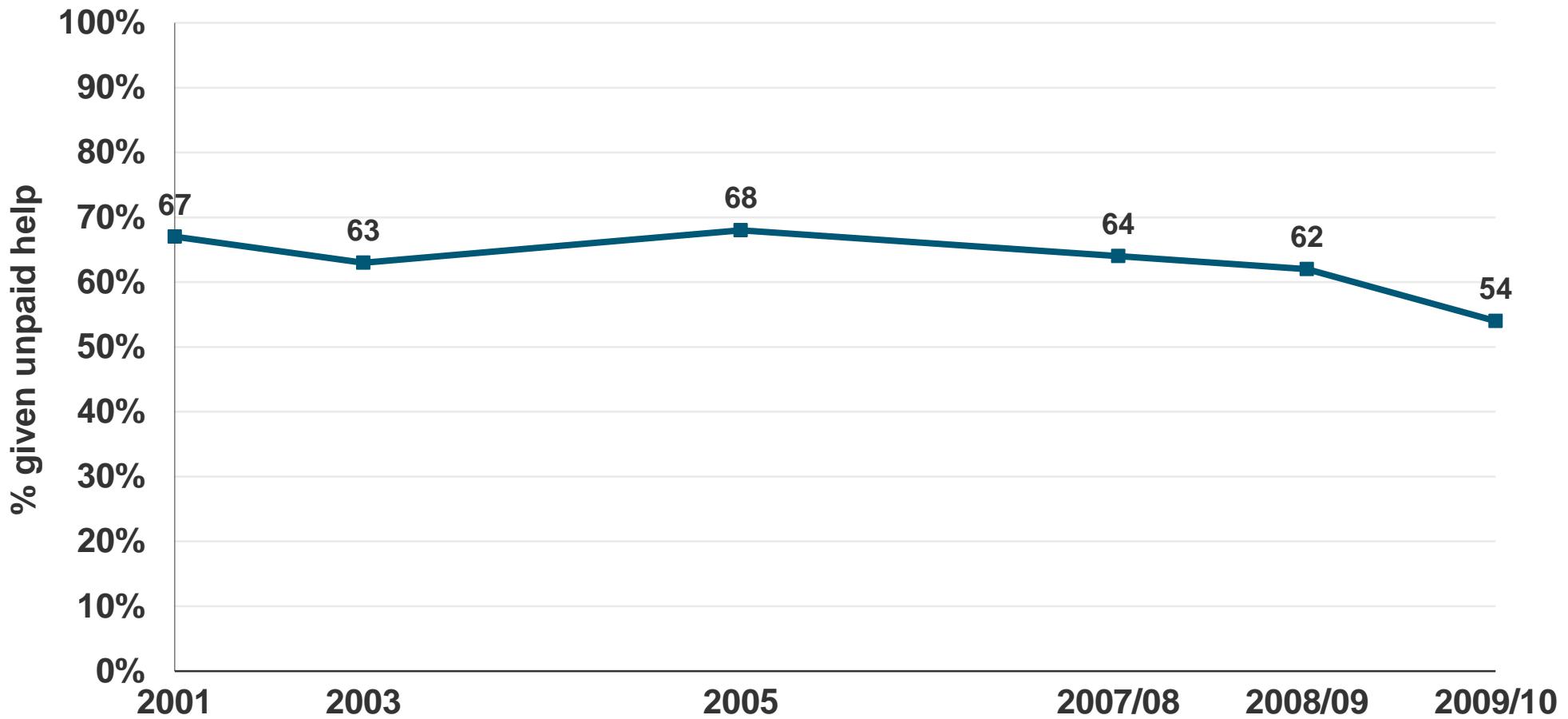


But need to be aware of how Neighbourhood capacity varies...



And how it's changing...

Proportion who have volunteered informally at least once a year



Base: All valid responses from core sample in England (~8,000 surveyed per wave)

Source: Citizenship Survey

**Involvement doesn't
always make people
happy – and people
will not always
respond “rationally”**

Localism Bill, NPPF & Plan for Growth

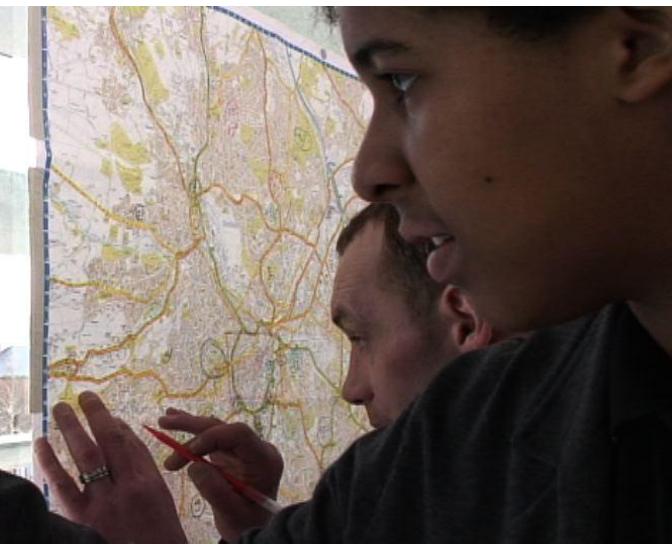
- Will shape policy landscape and place for years
- Opportunity to debate locally without top-down targets:
dumpy Christmas tree – 13% want to be very involved,
33% involved
- Strategic, difficult, political decisions involved
- Key role for evidence: “*Will your community’s ambitions ‘fit’ with the authority’s vision in the local plan?*” LGG, PAS, SOLACE
- “*Urgent need for Local Plans to be brought up to date*”
CBRE et al

**Involve people carefully – but
build on what we already
know**

Are lots of examples of this working....

“A common factor in **the solutions we have found is that they have involved the workforce and service users as well as councillors and officers** in developing sensible, long-term solutions.”

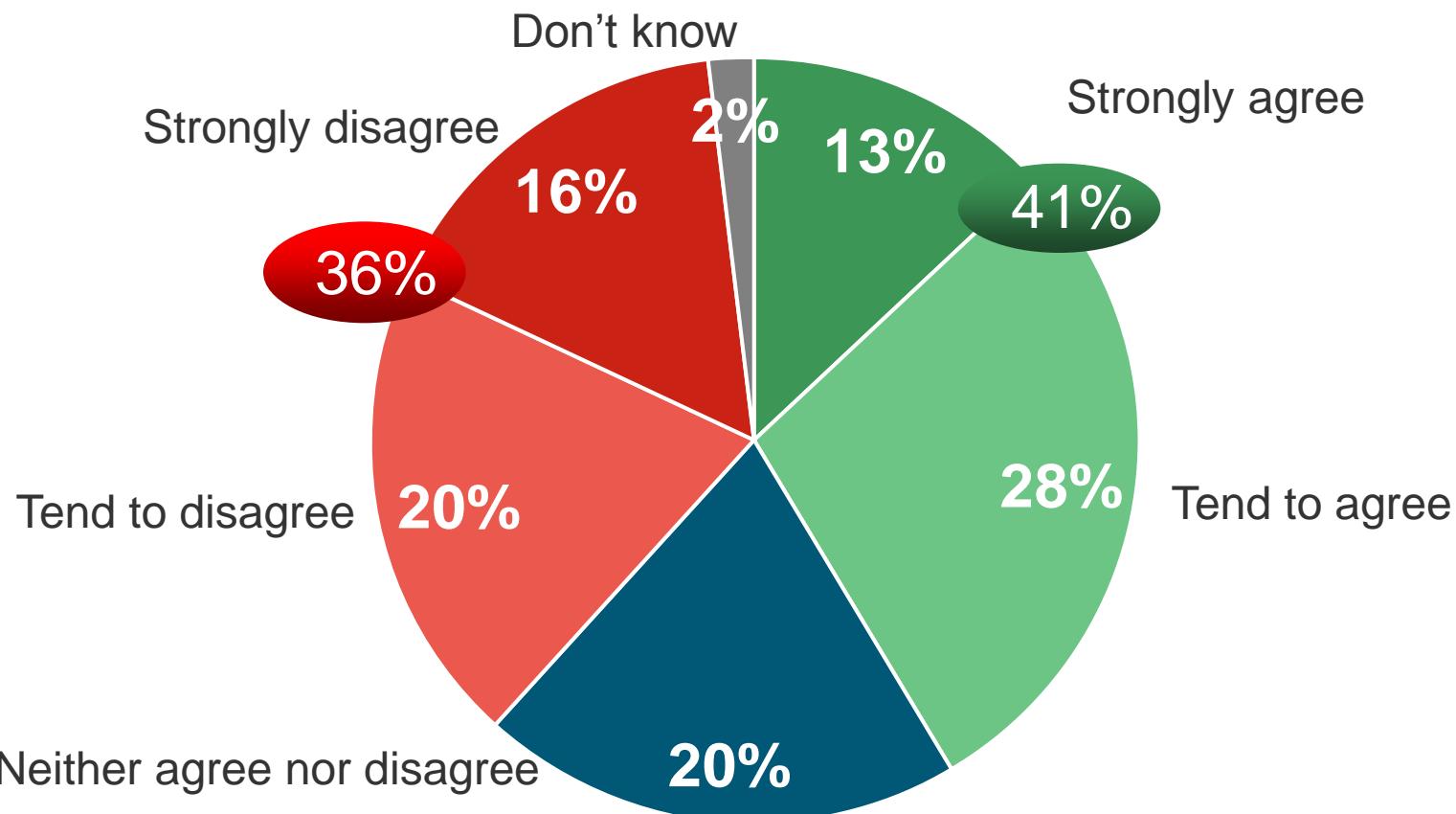
Huge range of techniques to get people involved and give them real control



**General support for
greater involvement
from the voluntary
sector – especially in
non-core services**

Two in five don't mind who provides health services as long as they are free of charge

Q To what extent do you agree or disagree with the following statement:
“As long as health services are free of charge, it doesn’t matter to me whether they are provided by the NHS or a private company”



Base: 993 English adults 18+, interviewed face-to-face, 18-24 February, 2011

Ipsos MORI

Source: Ipsos MORI /Nuffield Trust



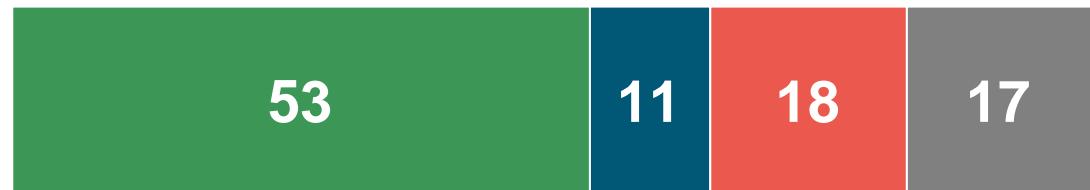
Charities and not for profits are top-of-mind for care

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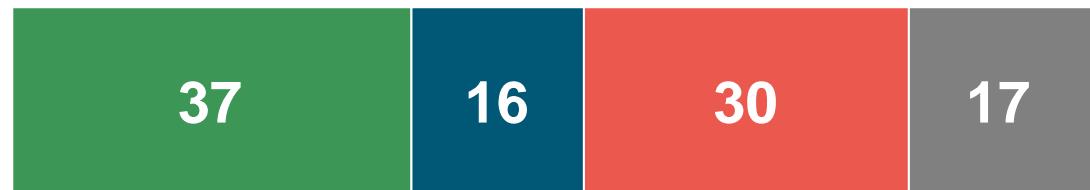
Some charities and some private companies receive funding from government to provide certain public services, such as healthcare services, care for the elderly, services for disabled people etc. Other public services are provided directly by public authorities such as the NHS or local councils. Of these three types of service provider, which one do you think would be BEST at...

■ % Charities / NFP orgs ■ % Private companies ■ % Public authorities ■ % Don't know

Providing a caring and compassionate service



Understanding what service users need



Base: 1,001 British adults, 20-26 November 2009

Ipsos MORI

Source: Ipsos MORI



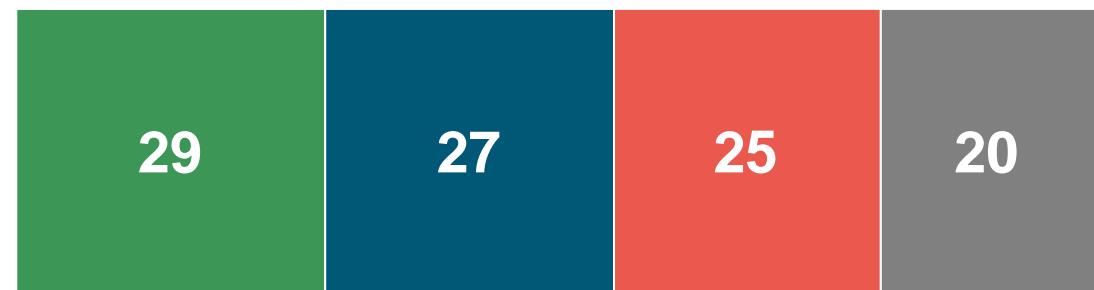
Attitudes to best provider for quality of service are more mixed

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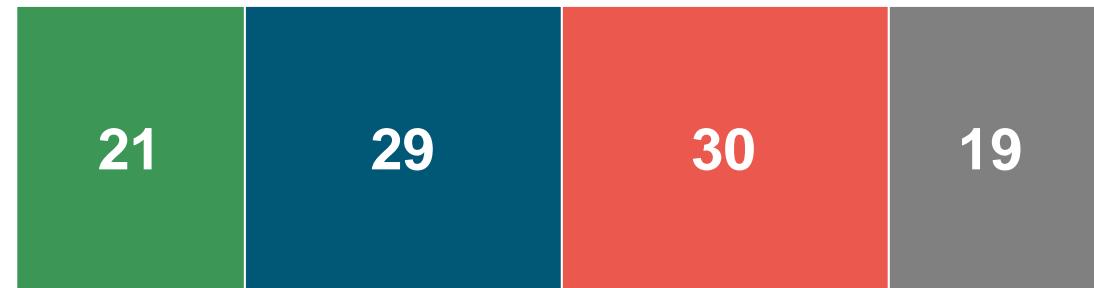
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■ % Charities / NFP orgs ■ % Private companies ■ % Public authorities ■ % Don't know

Providing the best quality of service for the money



Providing a professional and reliable service



Base: 1,001 British adults, 20-26 November 2009

Ipsos MORI

Source: Ipsos MORI



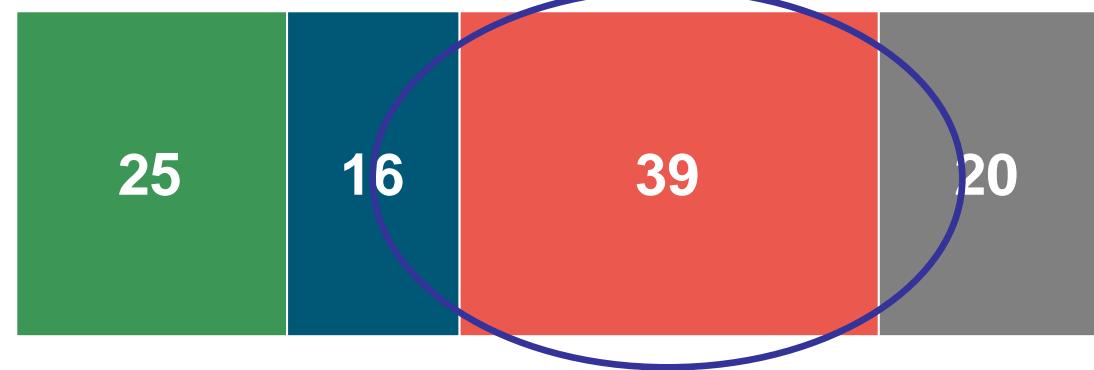
...and charities / NFPs do need to fit into context of wider service provision

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Deciding exactly what type of service should be provided



Base: 1,001 British adults, 20-26 November 2009

Ipsos MORI

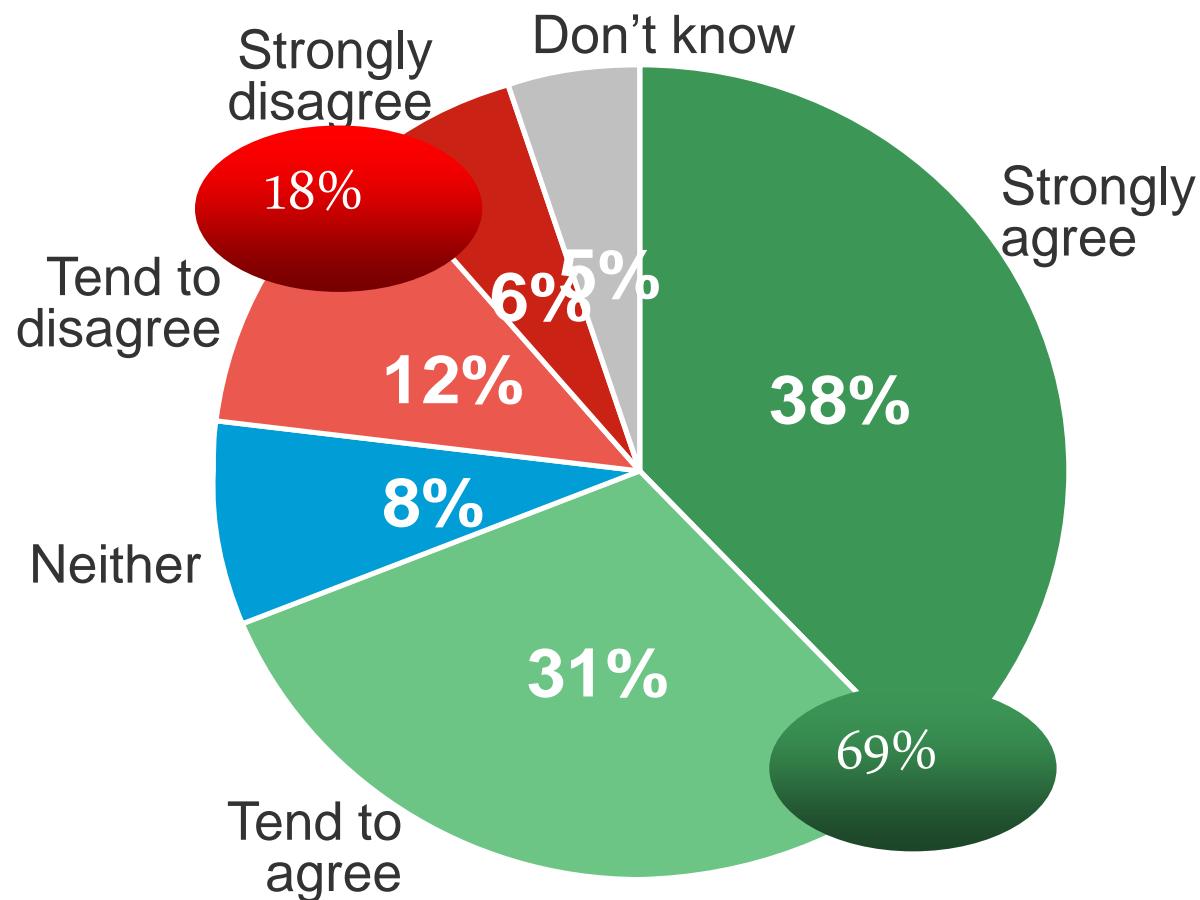
Source: Ipsos MORI



1,200,000

Are bits of society “sick”?

To what extent do you agree or disagree with the following statement: There are pockets of British society that are not only broken, but frankly sick?



Base: 1,002 British adults 18+, 20th – 22nd August 2011

Ipsos MORI

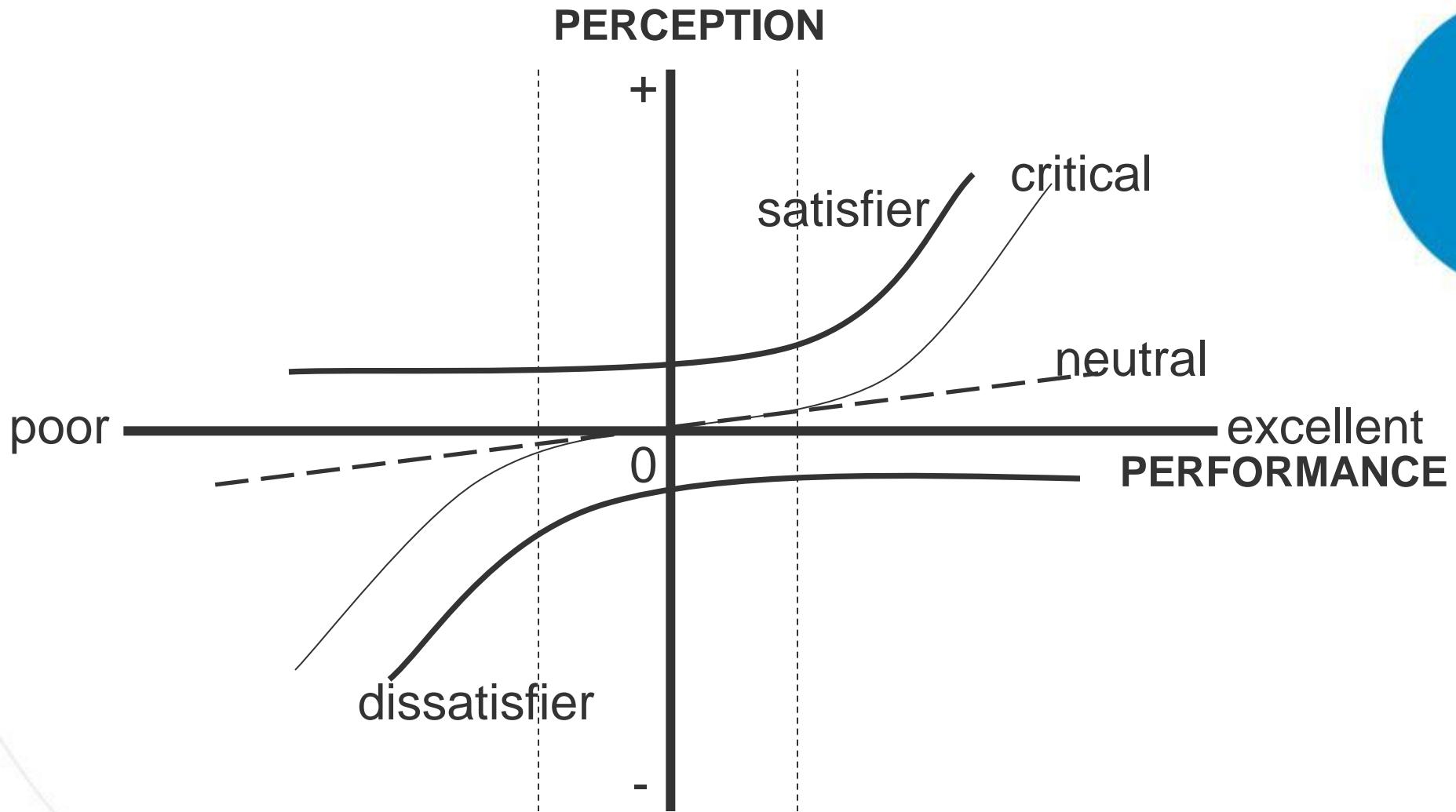
Source: Reuters/ Ipsos MORI Political Monitor



SERVICE AND RELATIONSHIPS STILL MATTER – WE HAVE TO LET OUR CUSTOMERS DELIVER IT



WHAT ARE YOUR CUSTOMERS' SATISFIERS/DISSATISFIERS?



MAKE ME FEEL SPECIAL...



(Starwoods membership) “**y***ou would always have a bigger bed and little chocolates on your pillow and a mini bottle of champagne. And even just little things like that they just make you feel a bit like I’m a bit special. I’ve just had a long day and got here late but look I’ve got a few chocolates on my pillow, it’s not really costing them a lot of money but it just makes you feel a bit cared about.*” Female, Frequent traveller

“**I work in that clothes shop and it’s quite expensive, and sometimes people say can they have a key ring for free and it’s no problem if it’s £700 or something. Everyone likes a little bit extra to feel special, like you’ve got a good buy.**”
Female, 18-34

Recognise me!



"If they know you haven't got kids, and you don't want to go at peak times, and you don't want to go to somewhere chavy or whatever...then they can tailor that to you...all I ever get is emails like, a break here that's not appealing, or too expensive or something."

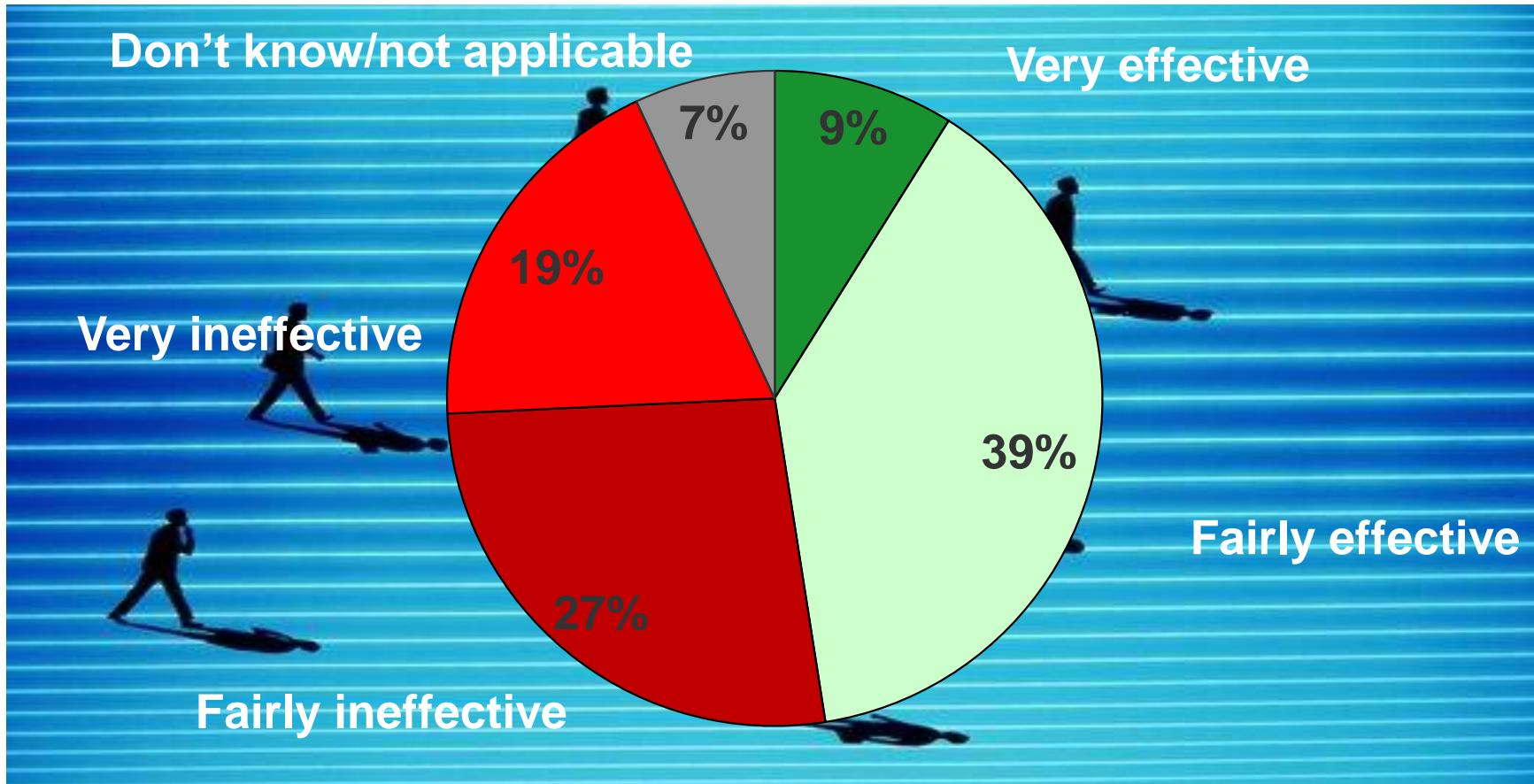
Female, Infrequent traveller

(Marriott) "One thing really I want is an ironing board, I iron my shirts always, and it's always there...They've got my full preferences there every single time and they actually go the extra mile to make sure that I'm happy."

Male, Frequent traveller



BUT FEWER THAN 1 IN 10 MARKETERS SAY THEIR CRM SYSTEMS/ DATABASES ARE “VERY EFFECTIVE”



Q

How effective are your customer databases or CRM systems at allowing accurate analysis and profiling of customers and customer segments?

Base: All using CRM as marketing method (787)

Source: Chartered Institute of Marketing Trends Survey

And finally.....



In conclusion....

- Great to be with cheerful optimists
- Think hard about whether you need a Reputation programme as opposed to an Engagement programme
- Politics increasingly about a conversation – crisis may make that more possible
- Young are being hit hardest – storing up trouble
 - Inequality will rise
 - What can you do with the technology, authority, reach that you have
 - All rioters have families...
- Even more pressure on you – we all need to try something new
- Good luck!



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