



Embrace your digital citizen

Patient Experience Excellence 2023 - 24

KPMG. Shaping Citizens' Futures, Together.



Foreword

Navigating the balance between cutting costs, enhancing service delivery with new tech like Artificial Intelligence (AI), whilst still maintaining citizen trust, is a formidable challenge for the UK Government and public sector.

Our research this year on public sector Citizen Experience Excellence, shows that while progress is happening, government services are still designed and optimised in separate silos rather than around citizens' holistic needs, significantly impacting satisfaction.

Increasing numbers of respondents are unhappy with being able to find information and navigate government services smoothly, leading to an 11% drop in satisfaction from 2021 to 2023.

For the first time, satisfaction with digital interactions is higher than with human contact channels. But digital improvements have primarily occurred for specific departments, products, or services, leading to inconsistent and fragmented experiences. This approach falls short for digital citizens who want seamless journeys tailored to their individual circumstances and needs.

This dissatisfaction underlines the need for a radical reshaping of the relationship between citizens and public

services. Services work best when they're built around people's needs, not just on the organisations providing them.

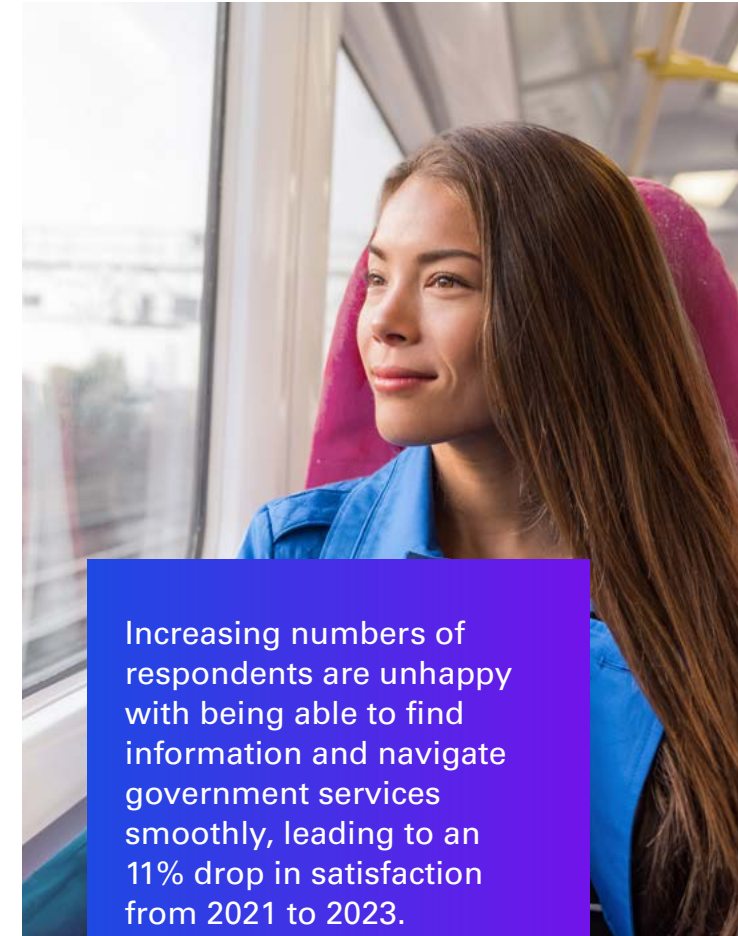
This means a major shift in how services are designed and delivered. We need to constantly improve services to meet the changing expectations of today's digital citizens.

There is a clear and present opportunity

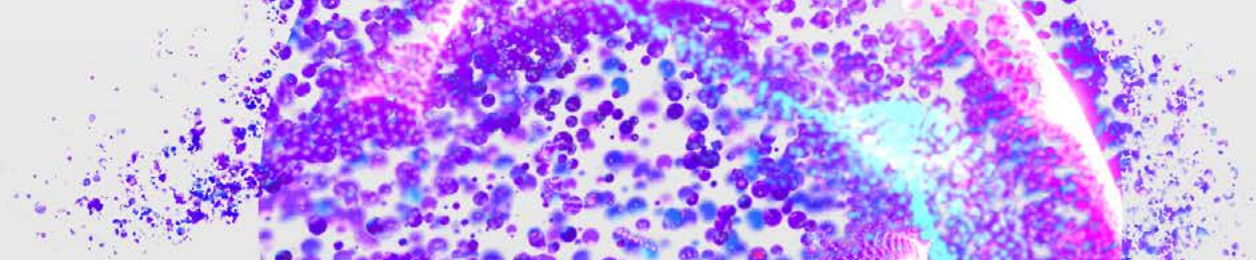
The good news is that there's never been a better time to take action. Today, we can create seamless digital experiences for citizens from start to finish, with user-friendliness and quality that were unimaginable just a decade – or even five years – ago.

This opportunity is boosted by the rise of the digital citizen, accelerated by the pandemic, which has increased digital literacy among people of all ages in the UK. Now, individuals are more comfortable navigating advanced technologies.

When it comes to embracing digital transformation, our research highlights three key themes that need attention: the balance between cost and value, the crucial role of emerging technologies (such as AI), and the essential element of citizen trust. These themes emphasise the need for an approach that prioritises citizens.



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Improved end-to-end citizen experiences lower costs and improve satisfaction

The research indicates that simply fixing the basics will greatly reduce failure demand, resulting in lower service costs and better experiences. Two key areas where focusing on digital solutions can make a big difference are:

Prioritising First Point of Contact Resolution: By ensuring that citizens can resolve their issues at the first point of contact organisations can reduce contact through more traditional, expensive channels. This not only reduces costs, but also enhances efficiency and convenience for citizens.

Proactively Informing Citizens: Keeping citizens informed and up-to-date through digital channels can significantly reduce the need for them to reach out for information or assistance. This proactive approach helps alleviate concerns and frustrations, leading to fewer contacts and smoother interactions overall.

By prioritising these digital solutions, the public sector can streamline processes, lower costs, and enhance the overall experience for citizens.

Technology centred around the citizen will be transformational

In the past, technology posed the biggest obstacle to progress, especially in the public sector with its legacy systems.

However, advancements in connective technologies like

Application Programming Interfaces (APIs), microservices, and cloud computing have made it easier to overcome government silos. These technologies enable seamless data-sharing among ministries or departments without sacrificing privacy.

As a result, organisations that have integrated their front, middle, and back-office technologies to facilitate digital self-service for citizens have experienced considerable financial savings and improved customer satisfaction.

Trust has become a key concern

The research shows a worrying decrease in trust in government and its services. Negative news stories consistently chip away at public trust in the entire public sector.

30% of citizens believe that the public sector doesn't prioritise their best interests or those of the community, which significantly harms citizen satisfaction. Our studies uncover a shocking 27% decline in satisfaction levels when this belief persists.

Amalgamating digital transformation, cost reduction, value, new technology, and trust

The successful digital transformation of the UK public sector requires a strong foundation that not only utilises technology, but also builds and maintains trust among citizens and stakeholders.

Adopting an end-to-end citizen-centric approach can lead to significant cost reductions by eliminating duplication, errors,

overlaps, and handovers.

Implementing AI can specifically eliminate repetitive tasks, freeing up time to enhance service delivery. Additionally, AI technology itself can instil trust through its consistency and accuracy.

However, beyond technology, it's crucial for the public sector to address areas where trust may be compromised. This includes finding ways for technology to replace human interaction seamlessly without losing the personal touch. It also involves recognising the importance of citizen communication and education.

Prioritising addressing citizen concerns and clearly communicating the benefits of new technologies should be central to their seamless implementation.



Jo Thomson
Partner, Customer Transformation,
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KPMG in the UK



Embrace your 'digital citizen'

There was an 11% drop in citizen satisfaction from 2021 to 2023, according to our latest research on Citizen Experience Excellence.

We found that citizens are becoming more and more frustrated with their experience of trying to find information and navigate government services. They have a perception that public services are 'imposed' on them – and that they're costly, excessively bureaucratic, and inefficient.

Today, we're dealing with 'digital citizens'. People of all ages are more digitally literate and more comfortable navigating advanced technologies. They want the best of the citizen experience they get from businesses mirrored in their interactions with the public sector. They want seamless journeys tailored to their individual circumstances and needs.

That level of service is even more important to them when they interact with the public sector. After all, they may be talking about things that really matter to their financial

security, health and wellbeing – not simply checking the delivery date for their new household appliance.

The good news is that there's evidence of government and public sector organisations making progress – in particular, where they've made digital enhancements. For the first time, citizens were more satisfied with their interactions through digital channels, rather than traditional routes like email or phone.

But these digital improvements have often happened in small pockets – for specific departments, products, or services. And where that's the case, the overall citizen experience has become less consistent and more fragmented – not joined up. They've also tended to be implemented to deliver on departmental goals, rather than with the end user – the citizen – in mind.

What's the answer?

Simply fixing the basics can help improve citizen satisfaction and deliver lower service

costs. Our analysis suggests there are two actions that can make a big difference: resolving simple issues on first contact; and keeping citizens informed on the progress of their case. These are both areas where tech can help – by answering basic queries and by helping employees provide better service.

But to really shift the dial, government and the public sector organisations need a more radical rethink. They need to gain a better understanding of what citizens want and how they can deliver seamless journeys across all channels. AI has a huge role to play as a new colleague, taking on simple tasks and providing support to help your people provide better service.

Over the following pages, we take a deeper dive into our Citizen Experience Excellence findings and what they mean for your sector. We give examples of what great citizen experience looks like. And we provide practical insights on how you can embrace your digital citizen.



Citizen Experience Excellence 2023-24

Healthcare

Citizen satisfaction with the NHS has fallen by 12% from 2021 to 2023, more so than any other public sector organisation. The latest British Social Attitudes survey evidences this, reporting the lowest satisfaction scores recorded since the survey began.

Several key factors are influencing this decline, including the fading of the COVID-19 Halo Effect, decreasing access to healthcare services, and negative national news headlines. Ongoing pay disputes have also led to regular strikes and disruption to services.

It is estimated that every person in England has been impacted by increasing elective wait times, either personally or through a loved one.

At the same time, a mixture of rising demand for healthcare services and budget cuts are increasing operational pressures.

The time to act is now. The considerations that healthcare departments should focus on are:

Cost and value

Healthcare delivery channels are undergoing transformative shifts. While face-to-face interactions remain vital, the preference for digital platforms is increasingly apparent among citizens seeking care. Surprisingly, some of the most positive care encounters are now happening through digital mediums.

However, traditional channels such as phone calls, video calls, and emails, often result in less satisfactory experiences for users.

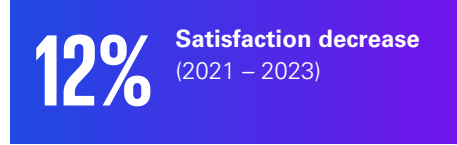
This contrast highlights a significant opportunity to improve satisfaction, particularly considering the significant costs associated with conventional channels.

Mental health services are a compelling illustration of this. Our research highlights that 36% of respondents in this domain opted for digital channels such as websites, apps, and chatbots – and, remarkably, they reported a 6% higher satisfaction rate compared to those who utilised phone, email, or video call services.

Technology

The evidence suggests that NHS bodies often fail to recognise the potential for technology to improve not only clinical effectiveness or operational efficiency, but also the citizen experience. According to our Forrester research findings, a mere 42% of healthcare decision-makers³ view the development of citizen-centric services as a primary impetus for their digital transformation endeavours.

In contrast, 63% prioritise operational efficiency, indicating a prevailing emphasis on streamlining processes, rather than placing citizens at the forefront of technology-led service enhancement efforts.



³ Source: a commissioned study conducted by Forrester Consulting on behalf of KPMG, October 2023

Trust

While health digitalisation holds significant promise, it is not a panacea for all challenges. Our research underscores citizen trust as a critical concern. As expectations regarding care delivery continue to grow, many individuals now anticipate a level of service on a par with the private sector offering.

Despite acknowledging the strains the NHS faces, citizens increasingly feel disillusioned when their expectations are not met and managed effectively, particularly concerning access to care services. This shortfall erodes trust in the system. Consequently, some citizens find themselves compelled to take a proactive role in seeking their own care or resorting to utilising personal savings to finance private treatment.

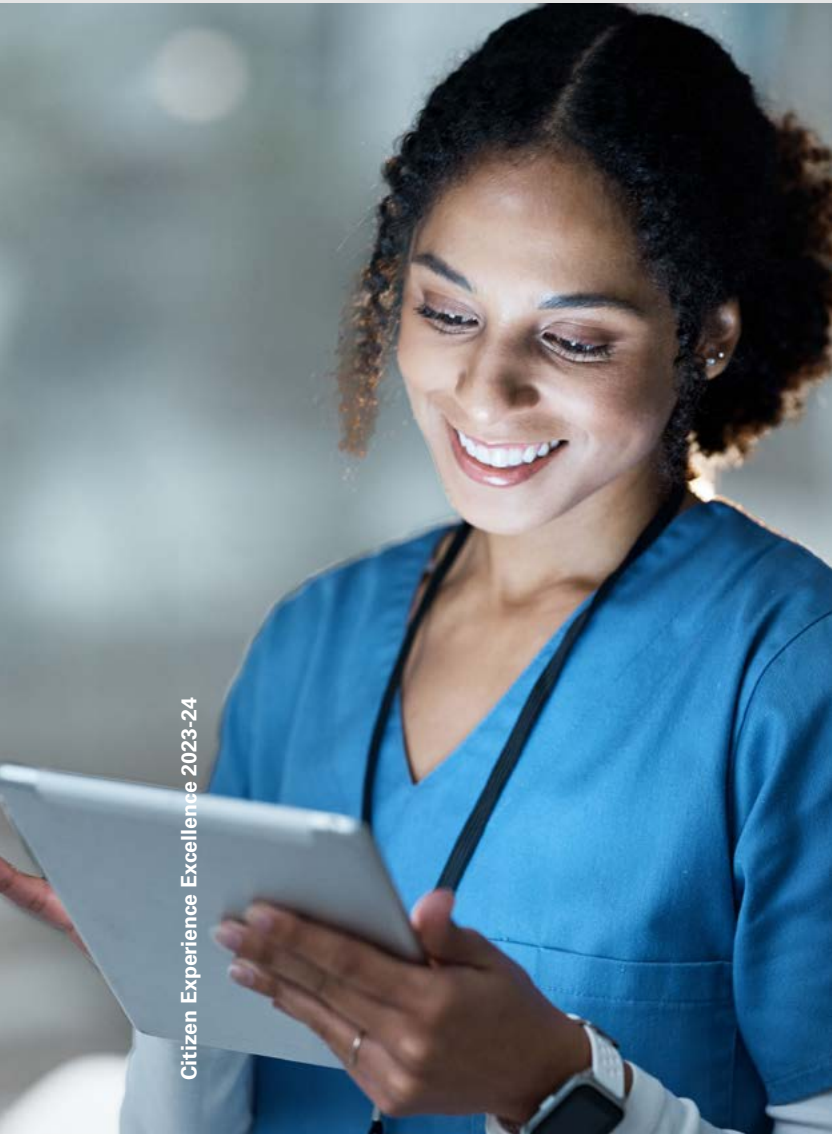
Priority actions

Healthcare organisations should prioritise enhancing three key attributes to improve citizen experiences:

- ✔ **Staff going the extra mile:** This entails resolving issues with a proactive attitude, resulting in a remarkable increase of 13% in satisfaction.
- ✔ **Getting citizens to the right place at the first attempt:** Streamlining processes to ensure citizens can access the appropriate care immediately saves time and effort, evidenced in our research by a 12% improvement.
- ✔ **Being proactive in keeping citizens up to date:** Keeping citizens informed and engaged throughout their healthcare journey contributes to the better management of expectations, leading to a 12% boost in satisfaction.

To achieve substantial improvements across these attributes, we recommend three interventions:

- ☀ **Resolution. Invest in citizen capability:** Equipping NHS staff with the necessary skills to design and deliver citizen-centric care fosters proactive improvements and enhances satisfaction.
- 🕒 **Time and Effort. Obtain richer citizen insights and combine them with population health intelligence:** By leveraging data analytics, healthcare organisations can identify areas for improvement, particularly focusing on first contact resolution and reducing wait times.
- **Expectations. Develop a patient portal:** Offering a platform for individuals to track their healthcare journey promotes better expectation management and engagement.



Citizen Experience Excellence 2023-24

Case study:

Singapore General Hospital

Singapore General Hospital (SGH) demonstrated significant advancements in our Citizen Experience Excellence rankings, rising 48 places to secure 5th spot in the Singapore market. This achievement stemmed from strategic investments in technology, building patient trust, and implementing cost-effective measures.

SGH implemented Robotic Process Automation to collect Patient-Reported Outcome Measures (PROMs), resulting in substantial time savings of 1,350 hours over 10 months and significant cost reductions. Additionally, efficient management of patient appointments led to shorter waiting times, contributing to an impressive Time and Effort score of 7.67, surpassing the industry average of 7.10.

Moreover, SGH cultivated a strong emotional connection with Singaporeans by leveraging familiarity and shared history across generations, enhancing trust in healthcare services.

“

Role model the change you want to see. If everyone puts the patient or citizen first in all that they do, that's going to have a huge cumulative effect. Beyond that, I always come back to the key importance of accessing the patient voice. It's essential we know what their experience is actually like if we're going to address the blockers and pain points. Our mantra in every meeting is, 'Where's the patient in this?'. If you keep that firmly in view, and create an evidence base around the lived experience, you will be able to build a prioritised programme for improvement.”

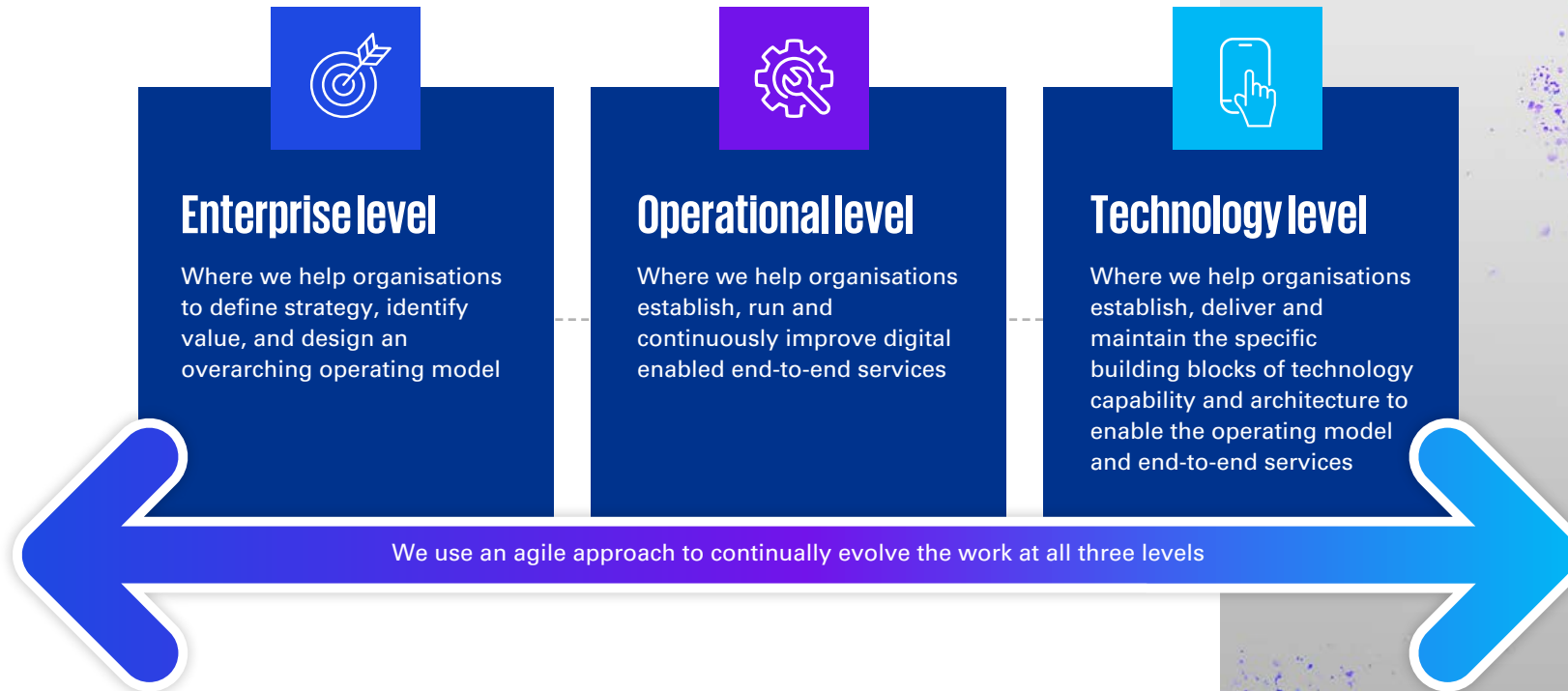
Cora McKeown

Senior Transformation Stakeholder Lead,
New Hospital Programme, NHS England

Our approach to patient-centric transformation

Connected Enterprise is KPMG's patient-centric, agile approach to digital transformation, tailored by sector. KPMG Connected Enterprise provides an integrated suite of preconfigured, sector specific enablers to design, build and operate a citizen-centric, agile, digitally-enabled organisation.

Our approach operates at three levels:



Contact us

We bring all three levels together, while wrapping our cultural and learning expertise around it, to ensure design is simple, cohesive, and implementable.

International leading practice, supported by a rich library of assets, fronted by teams that know how to apply them in practice, are readily available locally to support applying this across the organisation. Taking organisations from vision to tangible outcomes.

If you want to better embrace your 'digital citizen' using a connected approach, please contact one of our KPMG team.



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CREATE | CRT152929A | March 2024

Document Classification: KPMG Public