



Social Security Experience Panels: Communicating with Social Security Scotland by phone



EQUALITY, POVERTY AND SOCIAL SECURITY

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Introduction

In July and August 2018, the Scottish Government carried out a survey and focus groups with Experience Panel members to understand why they would want to contact Social Security Scotland (the agency) by phone, their views on waiting times and automatic messages, and how we could make calling the agency easier for them.

We also asked Experience Panel members if they would ever want to apply for benefits using a paper application form.

161 Experience Panel members took part in this survey. The survey took place before phone lines for the agency had been opened.

Summary

Reasons for calling Social Security Scotland

Almost nine in ten respondents told us they would call at one point to check on the status of an application. Other popular reasons for calling included getting advice on eligibility. The least popular reason for calling was to get information or links to other services or support groups.

Getting an immediate answer to a query was the reason most respondents would choose to contact the agency by telephone by a large margin. Being able to get a 'personalised approach' and their disability making it difficult to contact the agency through other methods were also common reasons for wanting to call.

Respondents said that reducing waiting times and making the calls free would be the best way to make it easier for people to call the agency.

Views on automated messages

When calling the agency, respondents wanted to either speak to an agent right away or to have the choice as to whether to use an automated menu or to speak to an agent. Few respondents wanted to use an automated menu exclusively.

Waiting times

If respondents had to wait to speak to an agent, most of them wanted to be able to request a call back. Just over a quarter requested the ability to leave a voicemail message or to be directed to other ways of contacting the agency.

Female and disabled respondents tended to not want to be directed to other ways of contacting the agency as an alternative to waiting.

If respondents chose to wait on hold, most said they would wait between three and five minutes with just over one in ten saying they would wait longer than ten minutes.

Call lengths

More than seven in ten respondents said they were able to talk on the phone for at least ten minutes and more than half for up to twenty minutes. Less than one in ten said they could speak for longer than forty-five minutes.

If a call was going to take longer than a caller felt able to talk, most respondents said they would like to arrange a time for the agency to call them back (57 per cent). Just over one in ten wanted to finish the call as quickly as possible and less than two in ten wanted to call the agency back when they felt able.

Background and research methods

The Scottish Government is becoming responsible for some of the benefits previously delivered by the Department for Work and Pensions. As part of the work to prepare for this change, the Scottish Government set up the Social Security Experience Panels. The Experience Panels are made up of over 2,400 people from across Scotland who have recent experience of at least one of the benefits being devolved to Scotland.

The Scottish Government is working with Experience Panel members to design a new social security system that works for the people of Scotland, based on the principles of dignity, fairness and respect.

To deliver the benefits devolved to Scotland, the Scottish Government have established Social Security Scotland ('the agency') who will be responsible for administering Scotland's new social security system. As part of the creation of the new agency, we have worked with Experience Panel members to understand their views on telephony and how we can make it easy to call the agency.

This report details the key themes which emerged from a survey which took place in July and August 2018. The research considered:

- Respondent's reasons for wanting to call the agency, and how we can make calling the agency easy;
- What should happen if phone lines are busy, waiting times and how long calls should last; and
- Respondent's views on automated messages.

Respondents were recruited from the Scottish Government Experience Panels (2,456 people). All Experience Panel members were invited to take part in the survey.

The Social Security Experience Panels are a longitudinal research project. The panels are made up of volunteers from the Scottish population who have experience of at least one of the benefits that will be devolved to Scotland. The results of this work should be regarded as being reflective of the experience and views of the respondents only, and are not indicative of the wider Scottish population. The number of responses for the survey was small and this should be kept in mind when considering the results. Percentages are given only to give a broad sense of the balance of opinion across respondents.

Survey Method

All 2,456 Experience Panel members were invited to take part in the survey. Participation in Experience Panels research is optional, and in this case 161 people chose to complete the survey (a response rate of 6.55 per cent).

This information was added to information from the ‘About Your Benefits and You’¹ and ‘Social Security Experience Panels: Who is in the panels and their experiences so far’² surveys. The data collected in these surveys was linked to the information supplied by respondents of this survey as part of the longitudinal data set for this project.

Almost four in ten survey respondents identified as ‘man or boy’ (39 per cent) and over six in ten (62 per cent) as ‘woman or girl’.

Table 1: Gender of survey respondents (n=130)

Gender	%
Man or boy	39
Woman or girl	62
Total	101

Over eight in ten survey respondents were aged 45 or over (85 per cent) with just over one in ten aged between 25 and 44 (15 per cent). No survey respondents were under the age of 25 or over the age of 79.

¹ Scottish Government (2017). *Social Security Experience Panels: About Your Benefits and You – Quantitative Research Findings*. [Online] Available at: www.gov.scot/Publications/2017/11/7769/

² Scottish Government (2018). *Social Security Experience Panels: Who is in the panels and their experiences so far*. [Online] Available at: www.gov.scot/Publications/2018/10/3083/

Table 2: Age of survey respondents (n=132)

Age	%
Under 25	0
25 – 44	15
45 – 59	46
60 – 79	39
80 or over	0
Total	100

Over 85 per cent of survey respondents considered themselves to have a disability or long term health condition:

Table 3: Disability status of survey respondents (n=132)

Disability Status	%
Disabled	86
Not Disabled	14
Total	100

Almost two thirds of survey respondents (63 per cent) had a physical disability. More than half of respondents also reported having chronic pain (58 per cent) or another type of long term health condition (65 per cent). Around one in ten respondents had a severe hearing impairment (12 per cent) and/or a severe visual impairment (10 per cent). Less than one in ten respondents (9 per cent) had a learning disability:

Table 4: Disability types of survey respondents (n=128-132)³

Disability Type	%
Has a physical disability	63
Has chronic pain	58
Has a mental health condition	32
Has a severe hearing impairment	12
Has a severe visual impairment	10

³ The percentages is of total respondents, not disabled respondents. Respondents were able to select multiple disability types.

Has a learning disability	9
Has another kind of disability or long term health condition	65

Almost half of survey respondents was a carer for a friend or family member (45 per cent):

Table 5: Caring status of survey respondents (n=128)

Carer Status	%
Carer	45
Not a carer	54
Prefer not to say	1
Total	100

Survey respondents most commonly cared for an adult friend or relative (31 per cent), but almost one in four (24 per cent) was a carer due to old age:

Table 6: Who do survey respondents care for (n=132)⁴

Person who they care for	%
Cares for an adult	31
Cares for a child	11
Carer due to old age	24

Survey respondents took part from thirty of the thirty-two local authorities, with the majority living in an urban area (66 per cent).⁵

⁴ Percentages include all respondents who took part. Respondents were able to select multiple options.

⁵ 17% of the Scottish population lives in a rural area - Scottish Government (2018). *Rural Scotland Key Facts 2018*. [Online] Available at: www2.gov.scot/Resource/0054/00541327.pdf

Table 7: Location of survey respondents (n=132)

Location	%
Urban	66
Rural	23
Prefer not to say	11
Total	100

Survey respondents who took part had experience of claiming a wide range of benefits. The most common benefits claimed by survey respondents were Disability Living Allowance (69 per cent) and Personal Independence Payment (67 per cent). The least common benefits claimed were Funeral Expenses and Sure Start Maternity Grant.

Table 8: Respondents benefit experience⁶⁷ (n=132)

Benefit	%
Disability Living Allowance	69
Personal Independence Payment	67
Winter Fuel Payment	34
Carer's Allowance	34
Cold Weather Payment	31
Universal Credit	22
Discretionary Housing Payments	21
Attendance Allowance	21
Scottish Welfare Fund	19
Severe Disablement Allowance	15
Industrial Injuries Disability Benefit	--
Funeral Expenses	--
Sure Start Maternity Grant	--

⁶ Respondents had experience of applying for (themselves or someone else) or receiving these benefits within the last 3 years, but were not necessarily in receipt of the benefit at the time of the survey.

⁷ Values of less than 10% are shown as --

More detailed demographic information on the Experience Panels as a whole can be found in *Social Security Experience Panels: Who is in the panels and their experiences so far* (Scottish Government, 2018⁸).

Reasons for calling Social Security Scotland

Respondents were asked why they would want to call Social Security Scotland.

Almost nine in ten respondents said they would ever call to check on the status of their application (all or most of the time, sometimes or rarely, 90 per cent) or to get advice on their eligibility (87 per cent). The least popular reason for calling was to get information or links to other services or support groups, where almost a quarter of respondents (24 per cent) said they would never call for those reasons.

Table 9: Respondent reasons for contacting Social Security Scotland (n=144-154)

Reason	All or Most of the time (%)	Sometimes (%)	Rarely or Never (%)	Would ever call ⁹ (%)
To check the status of my application	50	28	22	90
To get advice on my eligibility	38	34	28	87
To make an application	32	32	36	82
To get help with an application	30	30	40	82
To get information about visiting agency offices	30	32	37	82
To make a complaint or provide feedback	37	22	39	80
To request a home visit	42	24	34	78
To get information or links to other services or support groups	24	34	42	76

We asked respondents why they would choose to do these tasks by phone.

⁸ Scottish Government (2018). *Social Security Experience Panels: Who is in the panels and their experiences so far*. [Online] Available at: www.gov.scot/Publications/2018/10/3083

⁹ Percentage of all responses except 'Never'.

For some respondents, calling was an easy way to immediately communicate with Social Security Scotland:

‘If I require advice immediately, it is the fastest option...’

This was by far the most common reason referenced by respondents.

Others felt it was the best way to get an answer to specific questions:

‘Because it’s quicker and better at times if you have a query to speak to someone. It allows you to ask relevant questions and immediate answers.’

Many respondents told us that they preferred using their phones to going online:

‘I prefer telephone contact rather than new technology.’

Some respondents felt this way as they did not feel confident using a computer:

‘Well sometimes I’m not confident enough to do all things online and to talk to a person makes things easier.’

Respondents who had health conditions that made travelling difficult felt that calling allowed them to communicate with the agency without having to leave home:

‘Because I am disabled, I have never been in a DWP office in my life, I doubt it would be accessible...’

Others just preferred doing things online, only using the phone if they needed to get additional support or advice:

‘I’d only do some things by phone where I needed extra support or advice. Normally I prefer online communication.’

Finally, some respondents told us they preferred using the phone as it was easier than paper forms:

‘Sometimes paperwork is very complex. If you are talking to a person and don’t understand what they are saying you can ask them to explain it another way.’

A few respondents told us that they would not want to use the phone to do any of the tasks above. Some said they would want a written record of correspondence and this could not be done by phone:

‘I would not use the phone because it gives me no record of what was said or agreed.’

‘I prefer all communication in writing. [...] I have had extremely bad experiences in the past with the people I have dealt with...’

Other respondents told us their disability prevented them from using the phone:

‘As I have hearing loss, I would only use the phone as a last resort.’

‘I can’t cope with making phone calls or answering the phone.’

Making calls to Social Security Scotland easy

We asked respondents if there was anything we could do to make it easier to call Social Security Scotland. Many respondents talked about the cost of making the phone call and suggested a freephone number would be better than having to pay.

Some respondents told us that longer opening hours would be useful, particularly outside of working hours and at weekends. This is in line with previous findings, where Experience Panel members have expressed a strong desire to be able to call the agency outside of working hours, particularly in the early evening and on Saturdays¹⁰.

Respondents told us that phone numbers for the agency should be easy to find on the agency’s website and on any letters or leaflets.

‘The contact numbers need to be clearly detailed on the website / any correspondence.’

Having direct numbers to specific departments was suggested as a way to potentially minimise call times and avoid having to go through a menu system, letting people talk to an agent faster.

¹⁰ Scottish Government (2018). *Social Security Experience Panels: Agency Opening Hours*. p.5-7 [Online] Available: www.gov.scot/publications/social-security-experience-panels-agency-opening-hours/

‘...allow direct calls to various sections, i.e. decision making, payments, etc. rather than through a general call centre.’

When respondents got through to an agent, they told us they wanted the agent to be friendly, well trained and knowledgeable. They expected agents to be able to answer their questions or to be able to direct them to someone who could.

‘Make sure the operators are friendly and pleasant.’

‘More informed operators as not everyone has the same needs.’

Some respondents also told us they would like to speak to the same person about their claim, although other respondents thought this might not be possible.

‘...would be a help if we could always speak to the same person...’

Automated Menus and Messages

Respondents were asked what they wanted to happen when they called Social Security Scotland. Options included speaking to an operator right away to help the caller decide who they should talk to, or to go through an automated menu.

Respondents were split on their views, however most would prefer to be able to choose what happened (43 per cent) or to speak to an agent straight away (42 per cent). Just over one in ten respondents wanted an automated menu (15 per cent).

Table 11: What respondents want to happen when they call the agency (n=148)¹¹

	%
I would like to choose (for example, press # to go through to an agent)	43
Speak to an agent straight away	42
An automated menu	15
Total	100

Where an automated menu was used, respondents pointed out it should not have too many options or take too long to get through to an agent:

¹¹ Respondents were given the option to either select an option listed in the table above or to type in a free-text response. Where the free-text response was the same as the option in the table above, these were counted as that option.

'Do not have endless menus that lead to a dead end. I want to talk to a person quickly.'

When clients call the agency, there may be an automated message which tells them essential information before an agent answers their call. We asked respondents how long this message should take.

Over eight in ten respondents (84 per cent) wanted it to last less than ninety seconds, with almost half (47 per cent) wanting it to last less than thirty seconds.

Table 12: How long should automated messages last (n=140)

	%
Less than 30 seconds	47
Less than 1 minute	37
Less than 1 minute, 30 seconds	9
Less than 2 minutes	5
Less than 3 minutes	2
Total	100

Waiting times

When call volumes are high, sometimes callers may have to be placed on hold and wait to speak to an agent. We asked respondents what they would want to happen in these circumstances. Respondents were asked to tick all that would be acceptable to them.

Eight in ten respondents (80 per cent) said they would like to be able to request a call back. Around one in four (26 per cent) said they would like to be able to leave a voicemail message, or to be directed to other ways of contacting the agency.

Table 13: What should happen if phone lines are busy (n=161)

	%
Be able to request a call back	80
Leave a voicemail message	26
Directed to other ways of contacting the agency	26

An association was observed between gender and preference to be directed to other ways of contacting the agency¹².

Female respondents tended to not want to be directed to other ways of contacting Social Security Scotland (67 per cent said 'No') compared to male respondents (23 per cent said 'No').

A further association was observed between respondents with a disability or long term health condition¹³. Almost three quarters of disabled respondents (75 per cent) did not want to be directed to other ways of contacting the agency, compared to half of non-disabled participants (50 per cent).

Length of hold time

If respondents chose to wait on hold rather than calling back at another time, we asked them how long they would be willing to wait to speak to an operator.

The most common wait time was between three and five minutes, with just under half (46 per cent) of respondents willing to wait this long. Just over one in ten (12 per cent) would wait longer than ten minutes, and just five per cent would wait longer than fifteen minutes.

Table 14: How long would respondents wait on hold (n=139)

	%
Between 1 and 2 minutes	15
Between 3 and 5 minutes	46
Between 5 and 10 minutes	27
Between 10 and 15 minutes	7
Longer than 15 minutes	5
Total	100

No associations were observed between how long respondents would wait on hold and age, gender or disability status.

Respondents told us that the agency should aim to minimise waiting times and answer the phone to clients as quickly as possible:

¹² $\chi^2(1, n=130) = 4.555, p < .05$

¹³ $\chi^2(1, n=132) = 4.575, p < .05$

‘Call waiting times can be frustrating’

‘Answer the phone quickly. When a telephone system puts you on hold for an hour and tells you the call is important to them every 30 seconds, it clearly isn’t!’

Some respondents said they would appreciate knowing their number in the queue and the expected waiting time when they called:

‘No long phone queues. Tell me what number I am in the queue and the expected wait time.’

Call lengths

Once respondents were speaking to an operator, we wanted to understand how long they felt they could speak on the phone.

More than seven in ten of respondents (73 per cent) said they could speak for at least 10 minutes and more than half (51 per cent) could speak for up to 20 minutes. Twenty per cent of respondents told us they could speak for more than 30 minutes, but less than one in ten (9 per cent) could speak for longer than 45 minutes.

Table 15: How long would respondents feel comfortable talking on the phone (n=144)

Time	%
Less than 5 minutes	8
Up to 10 minutes	20
Up to 20 minutes	22
Up to 30 minutes	31
Up to 45 minutes	11
Longer than 45 minutes	9
Total	101

Sometimes calls to the agency may take longer to resolve than the caller feels able to stay on the phone for. In these circumstances, we asked respondents what they would want to happen next.

Almost six in ten respondents (57 per cent) said they would rather arrange a time for the agency to call them back. Just over one in ten (11 per cent) said they wanted the call to finish as quickly as possible, and less than two in ten (16 per cent) wanted to agree to call the agency back when they felt able.

Table 16: What should happen if the call is longer than you can speak on the phone for*¹⁴

Option	%
The agency will call you back at an agreed time	57
You will call the agency back when you feel able	16
Finish the call as quickly as possible	11

What's Next?

The Scottish Government will continue to work with the Experience Panels in the development of Scotland's new social security system. This will include further research on individual benefits in addition to cross-cutting work to assist in the development of Social Security Scotland.

The findings from this paper will be used to supplement Social Security Scotland's ongoing research into telephony and the client contact experience.

In particular, it will help us consider the way client's first contact the agency. More research will be carried out in future to consider the design and operation of the agencies telephony systems.

¹⁴ Respondents were given the option to either select an option listed in the table above or to type in a free-text response. Where the free-text response was the same as the option in the table above, these were counted as that option.



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