

ROS Annual Customer Survey 2013/14

Main Findings
29th January 2014



1

Background and objectives



Research background

- Registers of Scotland is a customer focused organisation playing an important role in supporting the property market in Scotland.
- Registers of Scotland has three main customer groups, namely the legal profession, other business customers and the general public. Providing high quality and efficient services to these stakeholders is a priority throughout the organisation – evident in the long established customer feedback surveys.
- In addition to a regular Mystery Shopping Programme, TNS BMRB has been commissioned to undertake an Annual Customer Survey since 2012. The second survey was undertaken in January 2013 and the latest survey, the third wave, ran at the end of 2013. The findings for all three waves are shown here for comparative purposes.
- The target audience for the survey is business customers working in both legal and non-legal sectors.

Research objectives

The overarching aim of this 2013/14 annual survey was to provide an up-to-date measure of customer satisfaction across all the main services and products of ROS.

Specifically the research was required:

- To provide a one number top level Index for ROS, that provides an overall measure of the quality/strength of relationship with customers;
- To continue to assess all main registers and online services on the key aspects of speed of service, accuracy and helpfulness of staff;
- To determine awareness of the new Land Registration (Scotland) Act 2012;
- To identify particular areas that require improvement; and
- To track trends, using previous findings.

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Methodology and sample



Methodology and sample

- The survey was undertaken using an online self completion methodology.
- 10000 email addresses comprising all legal and other business customers were supplied (securely) to TNS.
- 764 questionnaires were completed in total which equates to a response rate of 7.6%.
 - Which is a reasonable return for an online survey.
 - This is slightly lower than the 9.2% obtained earlier this year but much lower than the 15.1% in 2012.
- The achieved sample profile is similar to the earlier wave in 2013 but compared to 2012 wave there are fewer respondents representing small firms and many more representing large ones responding (see next chart for full details).
- Linked to this, as reported in the earlier 2013 study, the reduction in smaller firms is matched by fewer completed questionnaires from senior level respondents: owner/managers and director level customers.
- All interviews were conducted online, using CAWI (Computer Assisted Web Interviewing) during the period 30th November to 18th December 2013.

Sample Profile

- As views towards ROS vary so significantly according to size of firm and seniority of respondent, the 2013/14 results have been weighted to match the profile achieved in 2012 (and the weighted 2013 profile) according to both position within firm and number of employees. Using weighted data allows us to track findings at the total level.
- The sample profile, both unweighted and weighted, is shown below. Key differences are circled showing greater proportions of junior staff, and customers at larger organisations at the latest wave of research

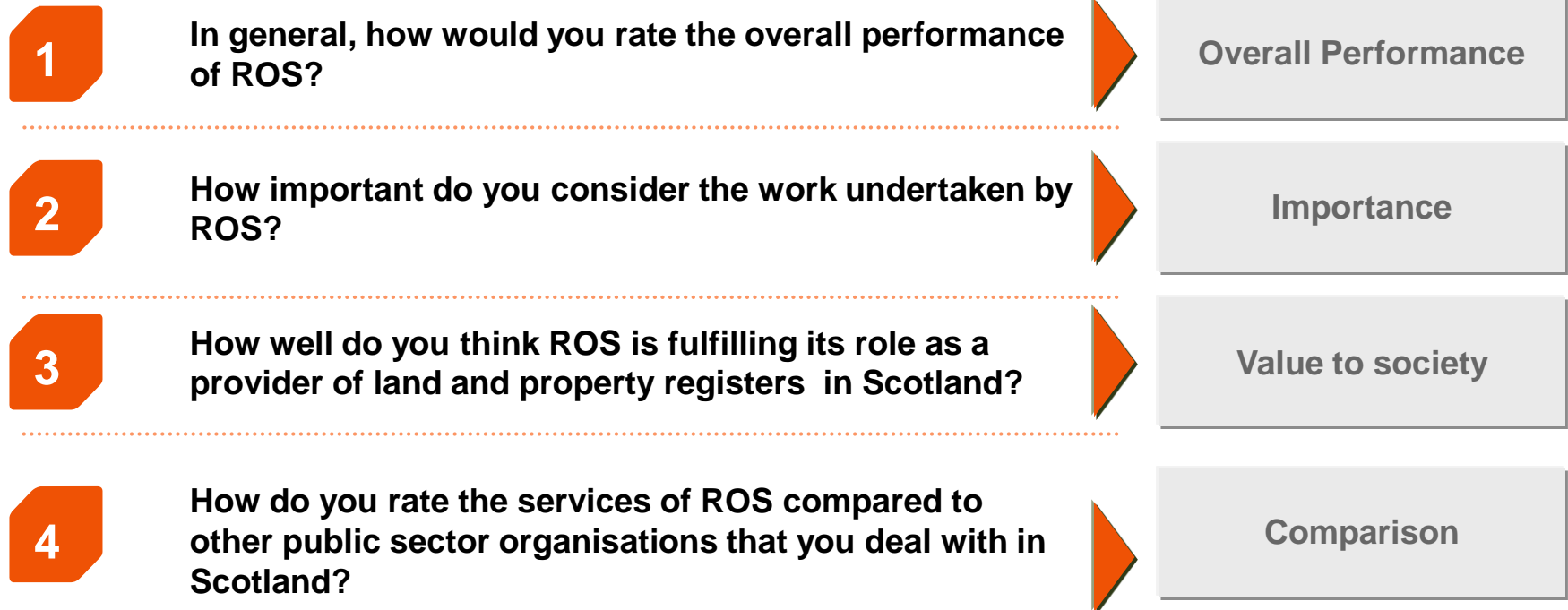
		2012 Unweighted % (850)	2013 Unweighted % (600)	2013 Weighted % (600)	2013/14 Unweighted % (764)	2013/14 Weighted % (764)
Level of seniority	Senior	35	21	35	18	35
	Mid	33	35	33	35	33
	Junior	32	44	32	47	32
Number of employees	Less than 10	24	17	24	15	24
	10-19	17	15	17	12	17
	20-50	18	12	18	14	18
	51-250	16	20	16	16	16
	250+	25	37	25	44	25

ROS Public Service Quality Index



The PSQ Index Questions

The index questions address the objectives of an organisation and the reputation of the way it is executing that role in practise



ROS Index: Exactly same index as earlier in 2013

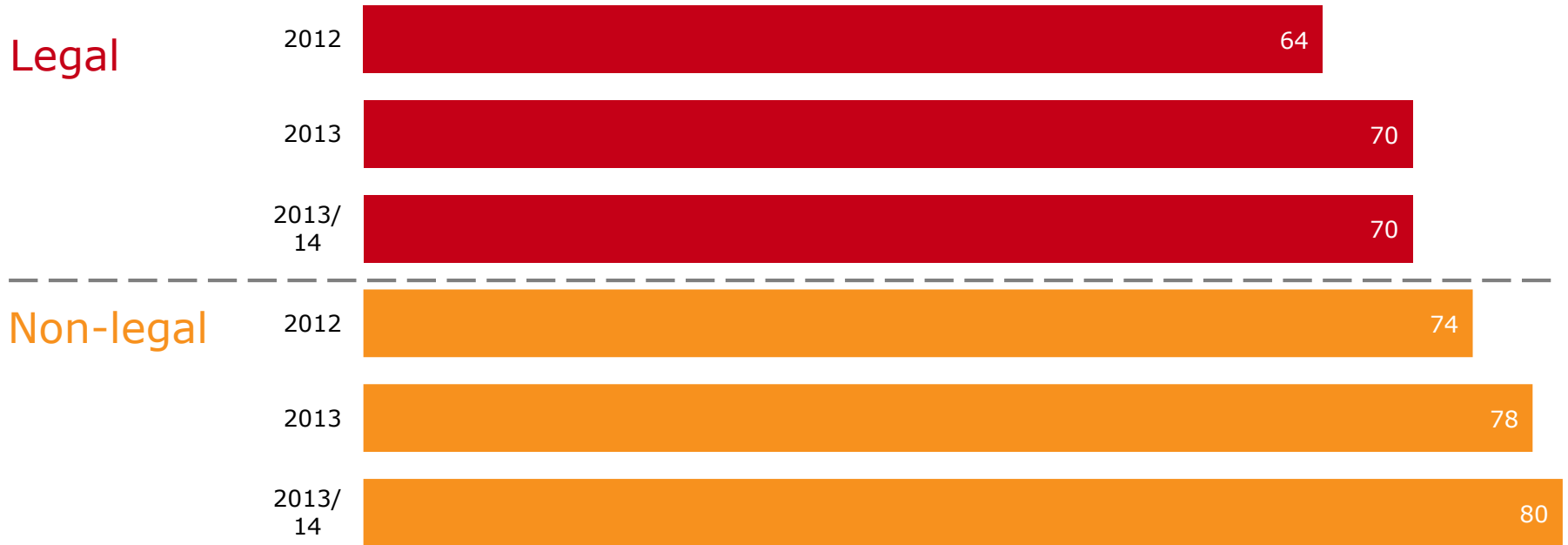
The TRI*M Index uses an effective scale that ranges from 0 to 100. Due to the concept of the Index calculation, there is a theoretical possibility of Index values of 'below 0' or 'above 100'. It is based on a weighted calculation from the responses to the 4 'Index' questions



Index scores are broken down as follows:

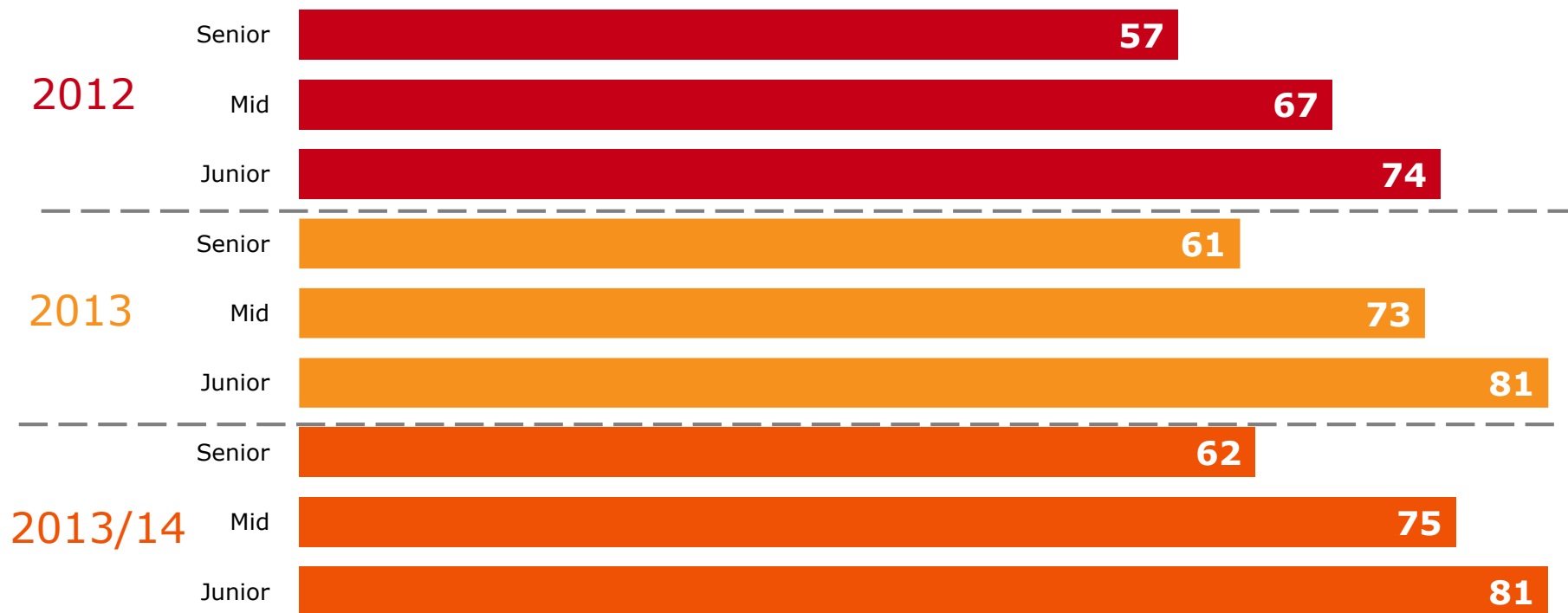
- 100 and more → Excellent/well above average
- 70 - 99 → Very good/above average
- 40 - 69 → Good/average
- 10 - 39 → Below average
- less than 10 → Well below average

Small increase in Index for those working in non-legal organisations and stable for those in legal organisations



Base: All respondents: 2012 (850) / 2013 (600) / 2013/14 (764)

Slight increase in Index for mid and senior level customers at latest wave

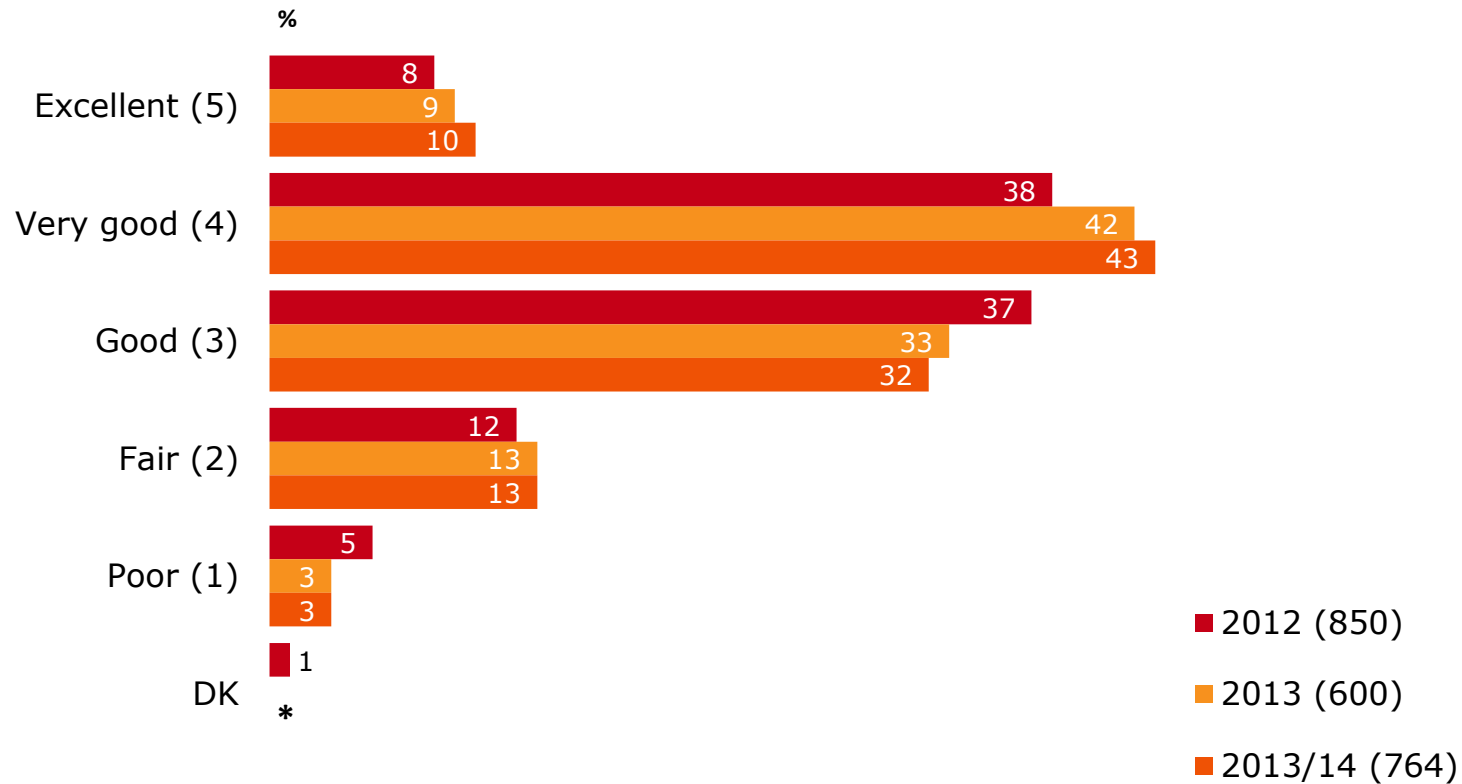


Base: All respondents: 2012 (850) / 2013 (600) / 2013/14 (764)

Overview of other key performance measures and values



Perceptions of overall quality of products and services continue to improve – albeit very slightly



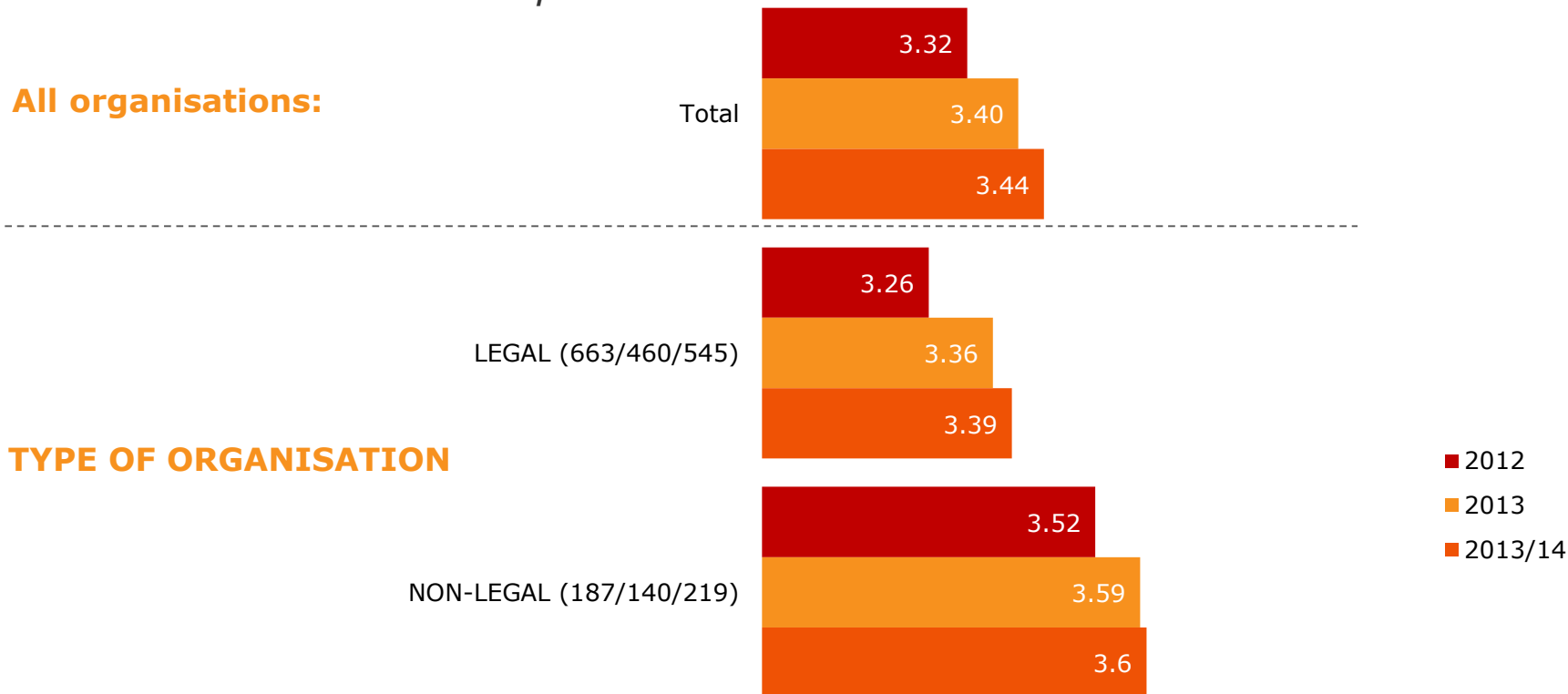
Base: All

Q5: How do you rate the overall quality of the products and services provided by ROS

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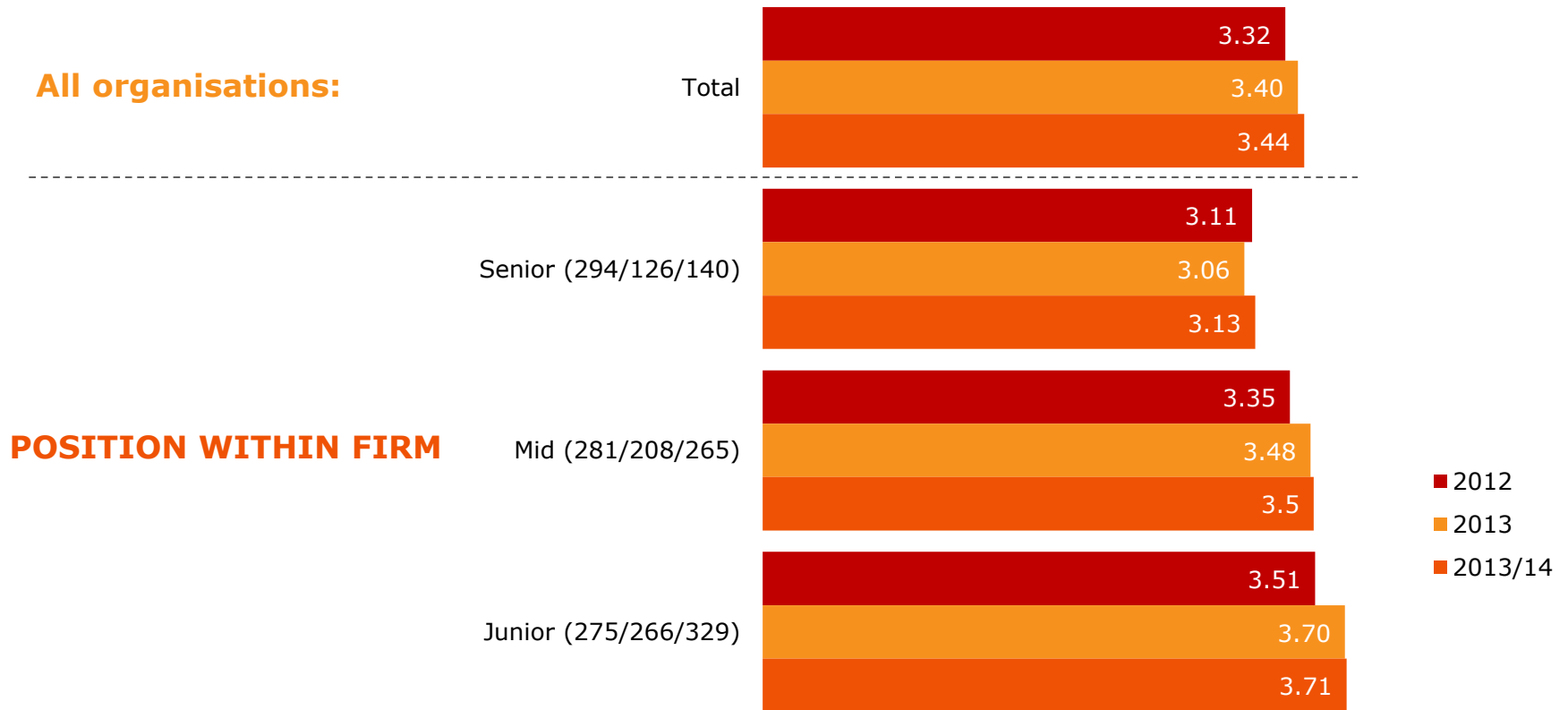
The improvement in perceptions of quality of product and services is driven by views of those in legal organisations, but their scores remain lower by comparison.

Mean score values of overall quality where 5 is excellent and 1 is poor



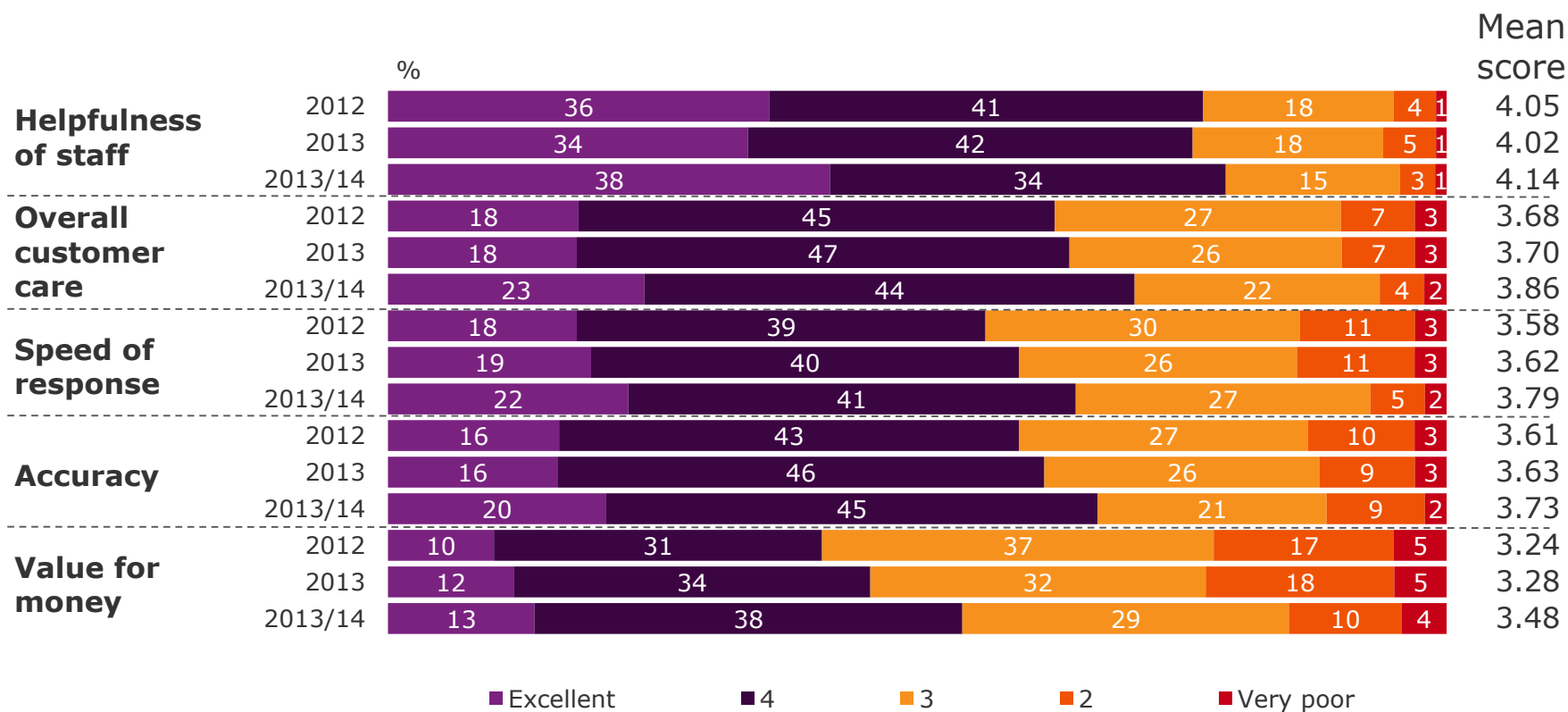
Base: 2012 All answering (850), 2013 All respondents (600), 2013/14 All respondents (764)
Q5: How do you rate the overall quality of the products and services provided by ROS?

Senior customers remain much less positive by comparison on the quality measure but their views have improved very slightly



Base: 2012 All answering (850), 2013 All respondents (600), 2013/14 All respondents (764)
 Q5: How do you rate the overall quality of the products and services provided by ROS?

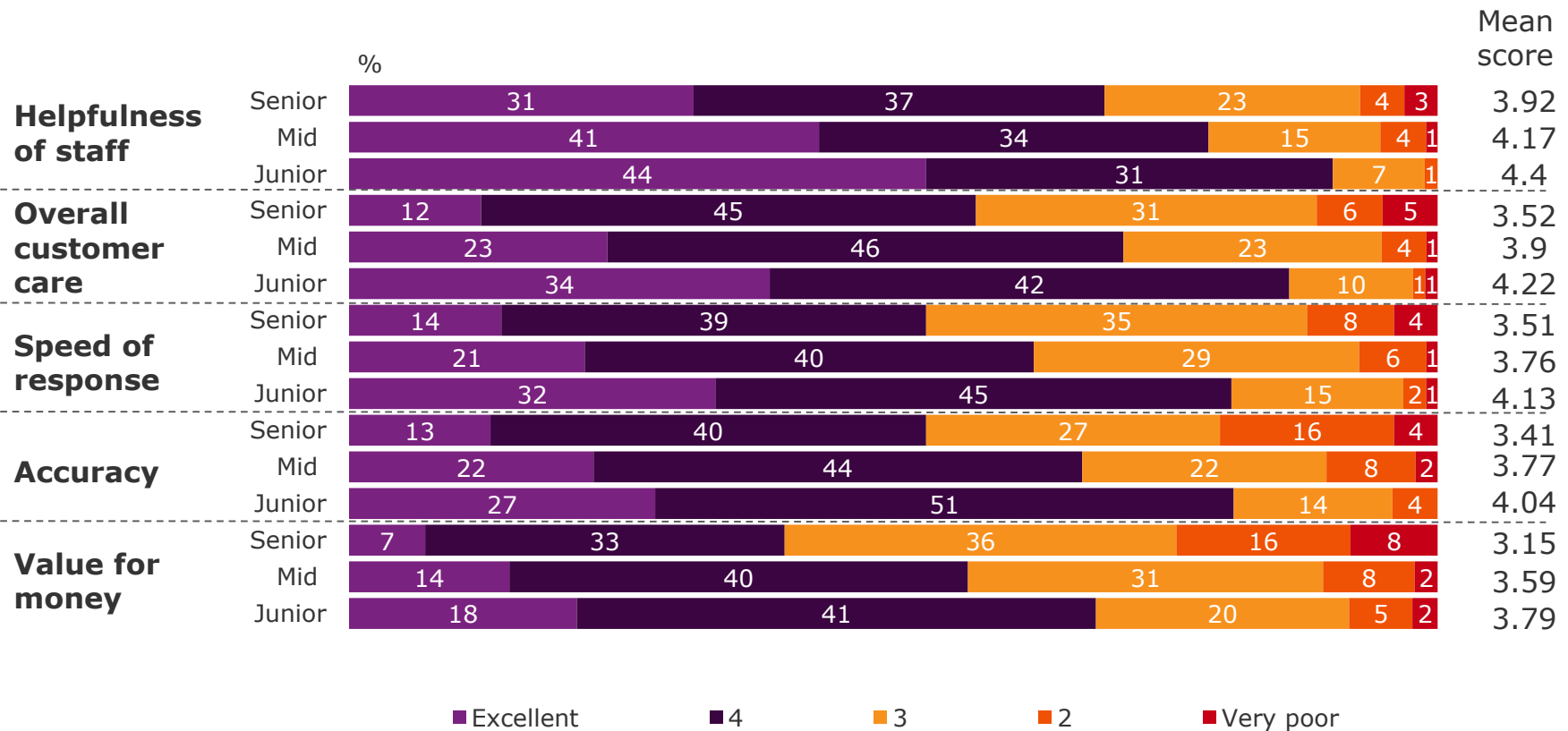
On all five overall customer service dimensions the latest scores are better



Base: All answering 2012 (805-834); 2013 (550-586); 2013/24 (680-744)

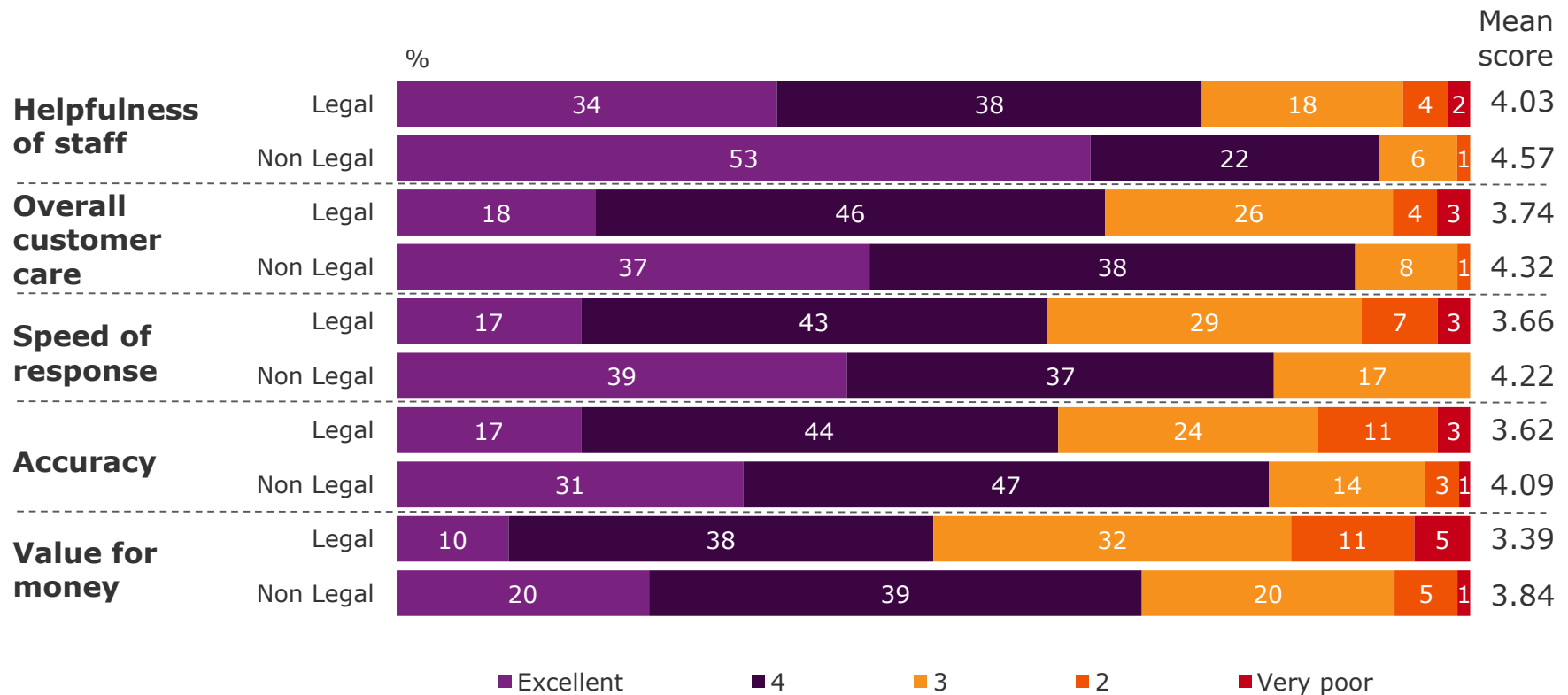
Q6: How would you rate ROS.....?

The very clear decrease in positive ratings on these services aspects as seniority increases is again evident in the latest findings



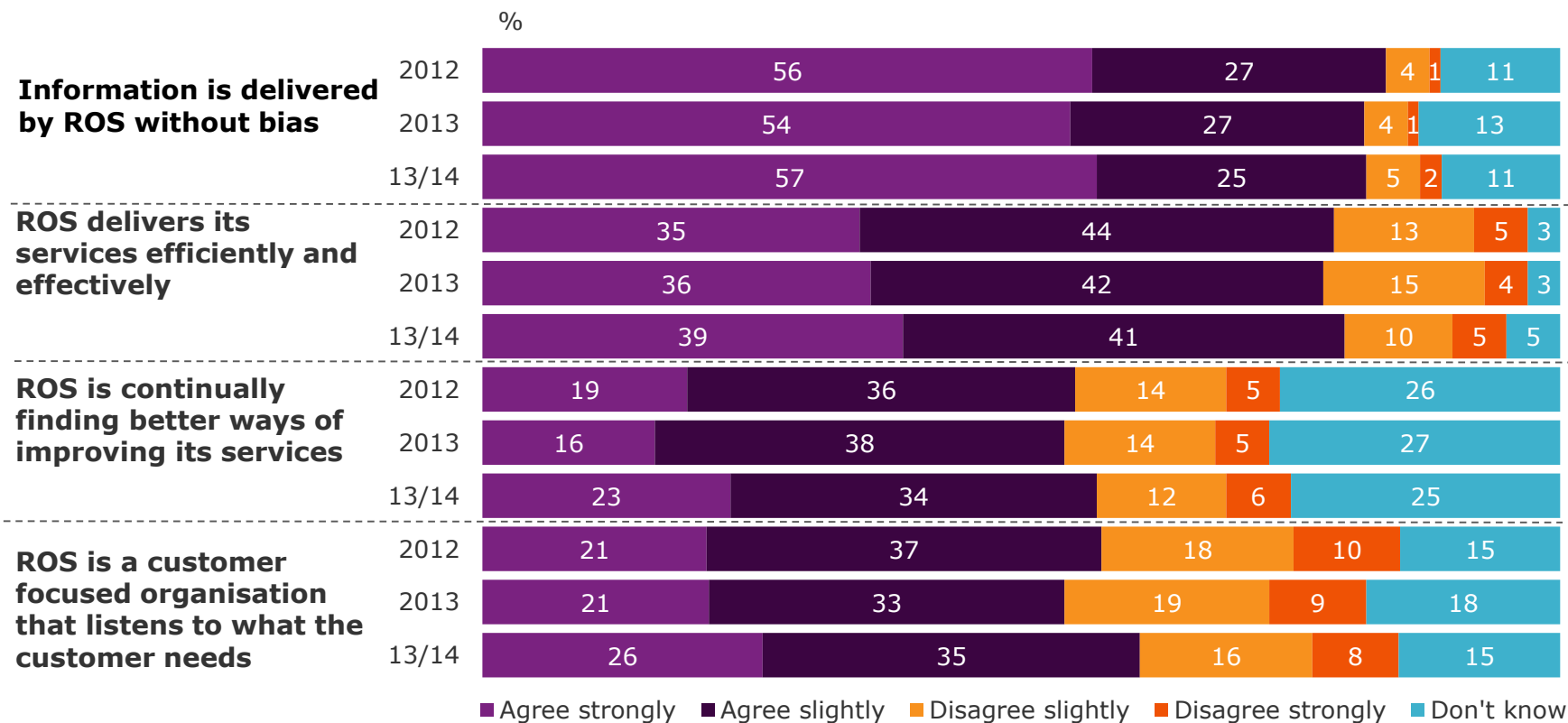
Base: All answering Senior level (140); Mid level (265); Junior level (359)
 Q6: How would you rate ROS.....?

Reflecting the different levels of seniority by type of organisation, non-legal customers rate ROS much more positively on these aspects



Base: All answering Legal (545); Non Legal (219)
 Q6: How would you rate ROS.....?

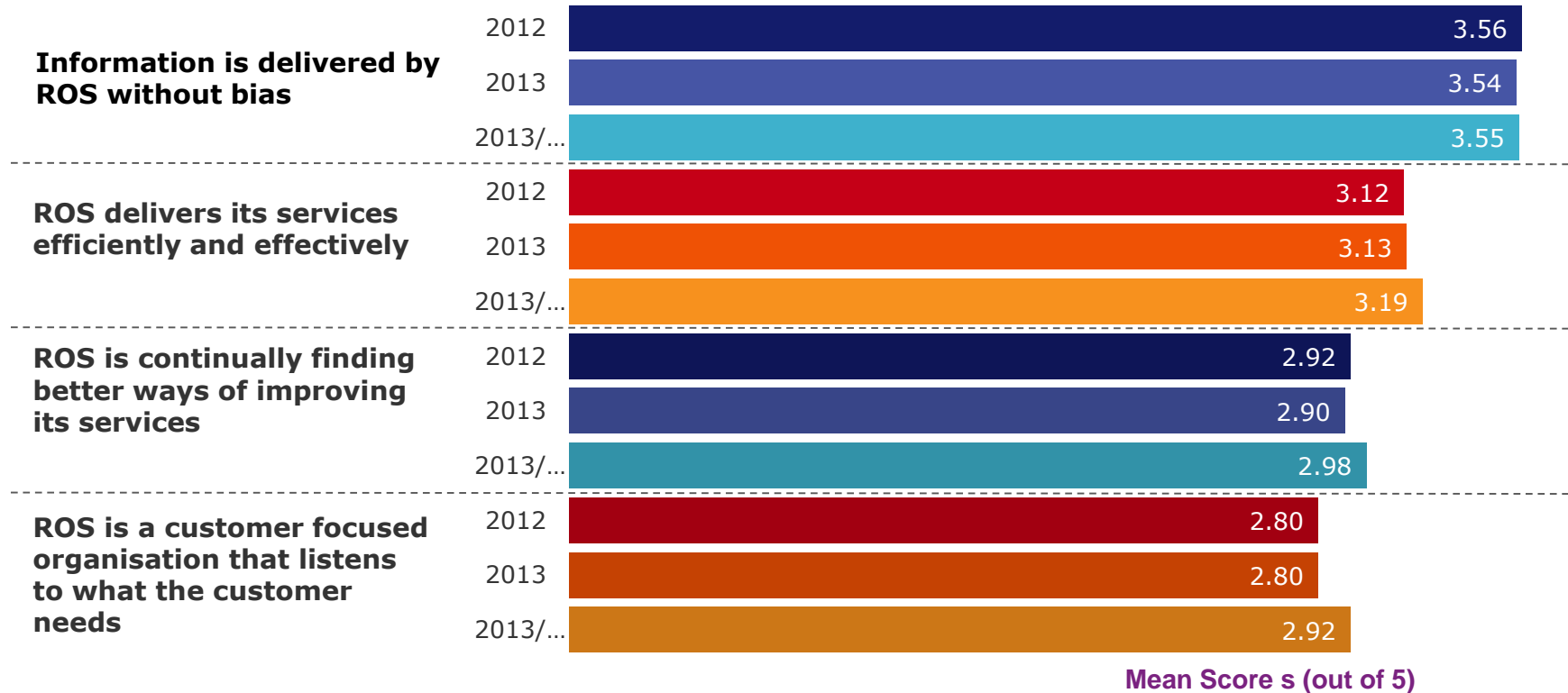
Slightly weakening of ROS values seen last time has been reversed, with best results in 2013/14 for all apart from 'deliver without bias'



Base: All respondents(850/600/764)
Q7 How much do you agree or disagree that.....

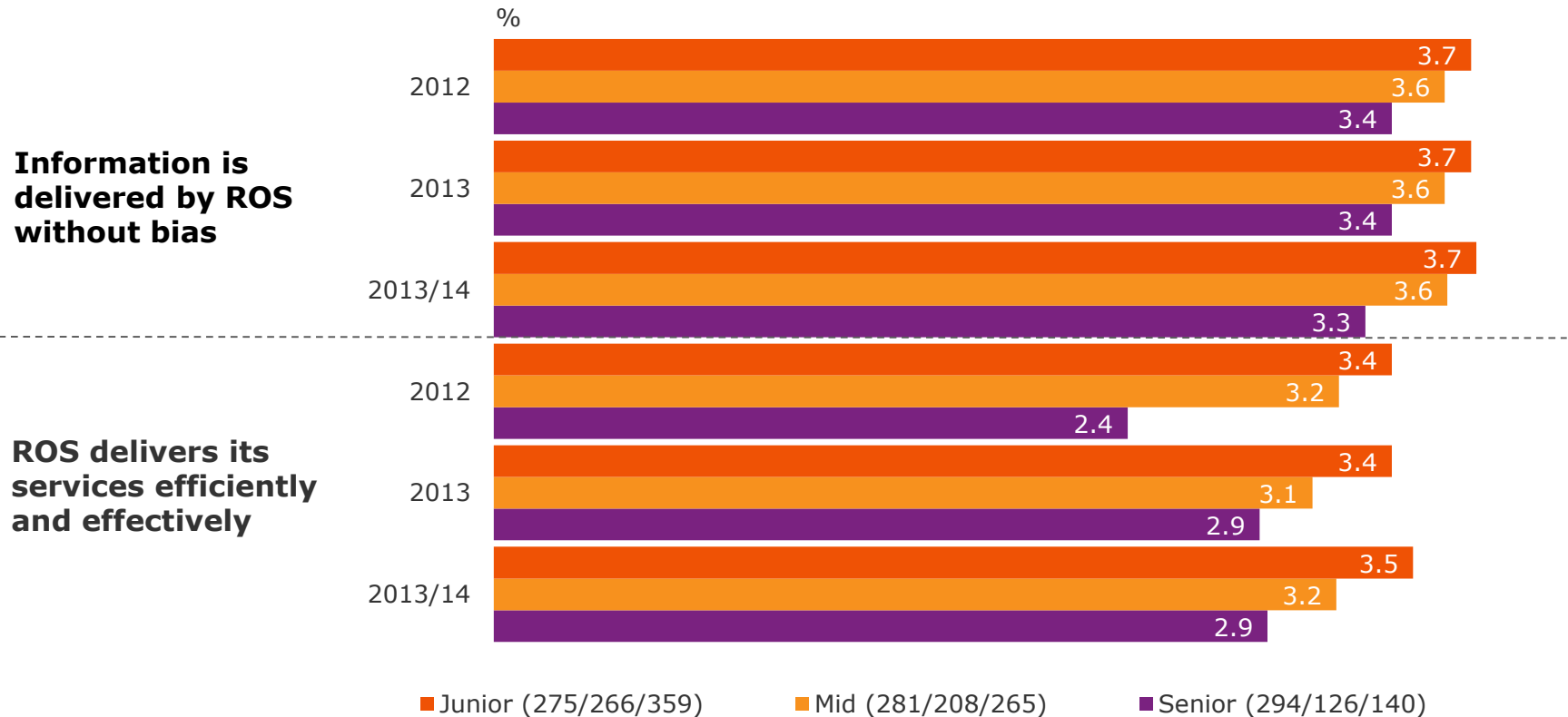
High level of ' don't' knows' especially for the improving services.

The very good set of results for lack of bias make it difficult to be bettered; whereas other values are starting to show slight signs of improvement



Base: All respondents (850/600/764)
 Q7: How much do you agree or disagree that.....?

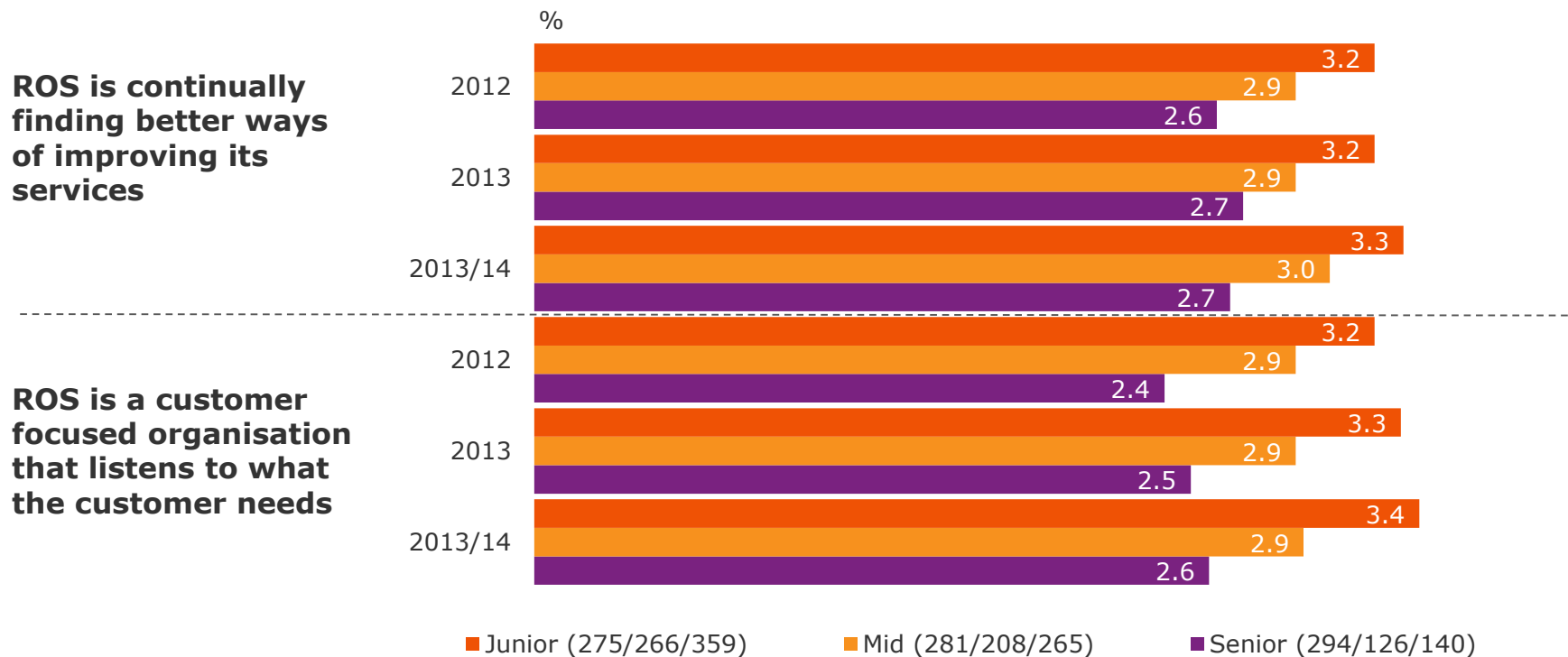
All grades of customers rate ROS very highly on bias whereas efficiency and effectiveness of delivery is far less well regarded by senior customers



Base: All respondents at each grade
Q7: How much do you agree or disagree that.....?

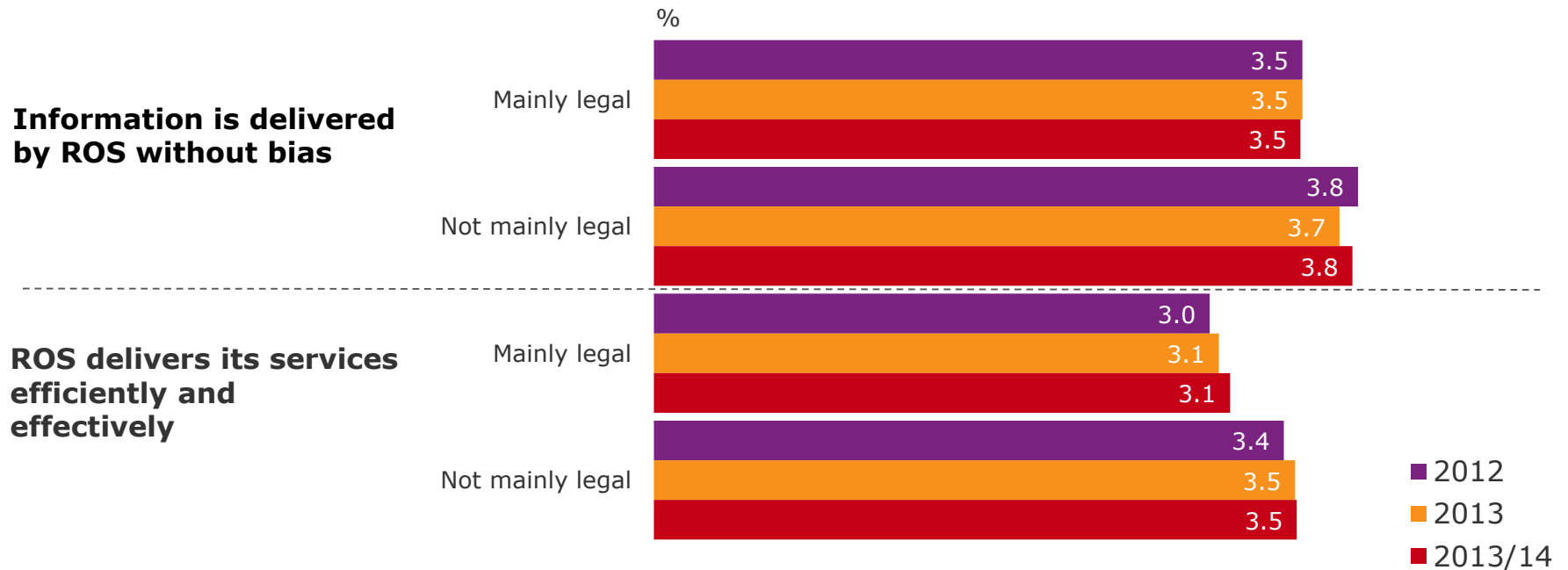
J121633- ROS Annual Survey 2013/14

For these two values the latest results are unchanged therefore the significant differences between the grades remain the same



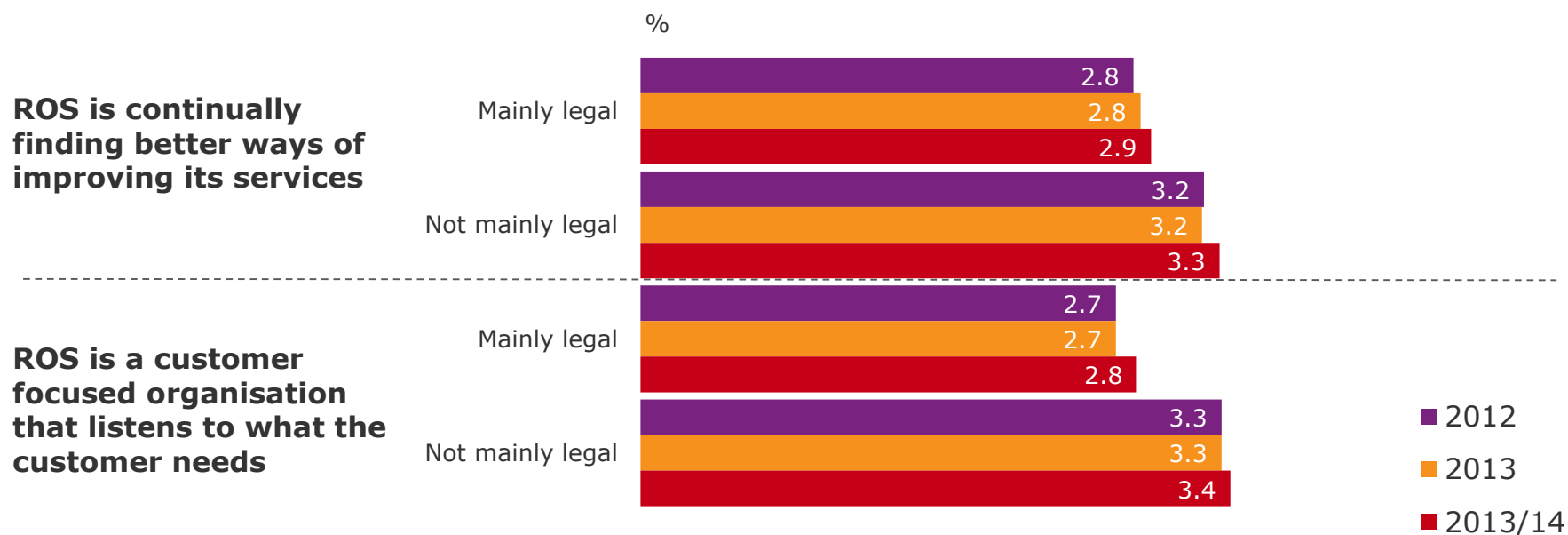
Base: All respondents at each grade
Q7: How much do you agree or disagree that.....?

Very little change recorded on these two dimensions according to type of organisation; lower scores for legal organisations continue to reflect the higher proportion of senior customers



Base: All Legal in 2013/14 (545); Non Legal (219)
 Q7: How much do you agree or disagree that.....?

Marginal improvements at latest wave evident for both legal and non-legal organisations for these two values



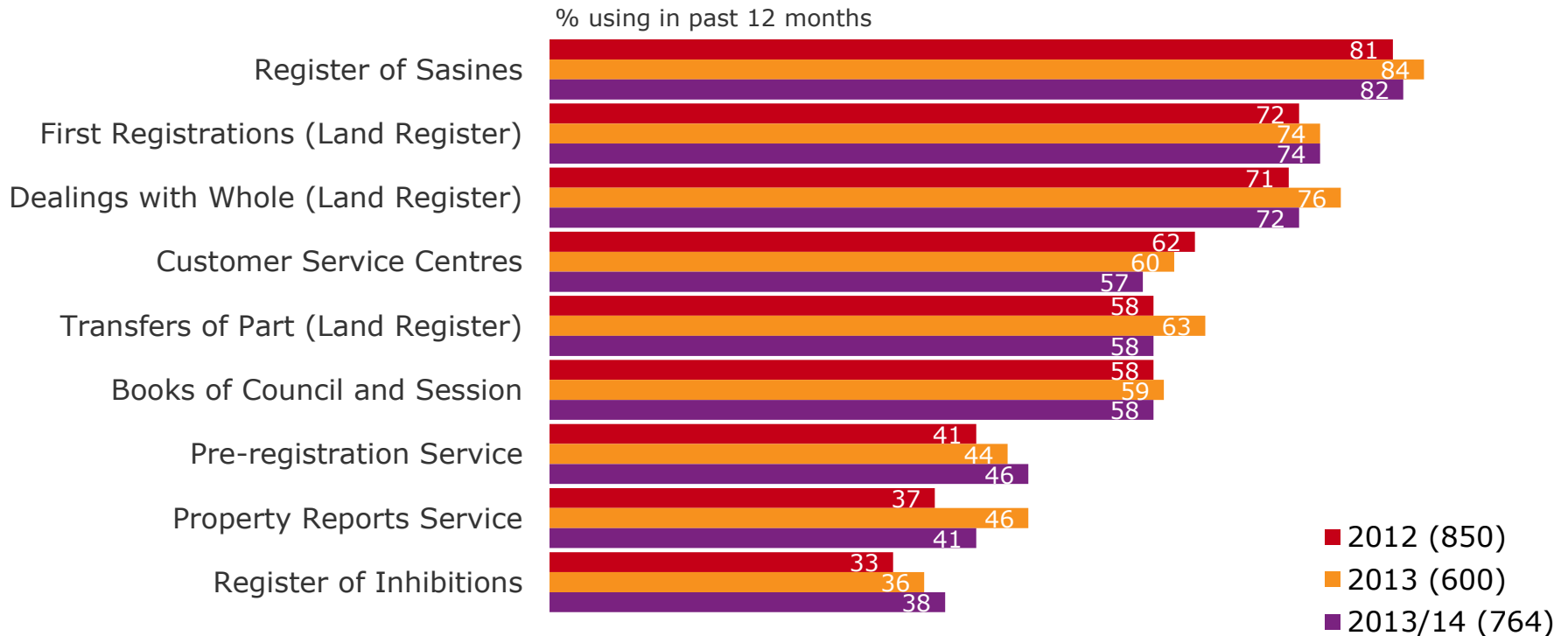
Base: All Legal (545); Non Legal (219)
 Q7: How much do you agree or disagree that.....?

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Usage of products/services (excluding online)



Slight decline in usage is a reverse of previous upward trend: this applies to all except Pre-registration and Register of Inhibitions where usage is slightly higher

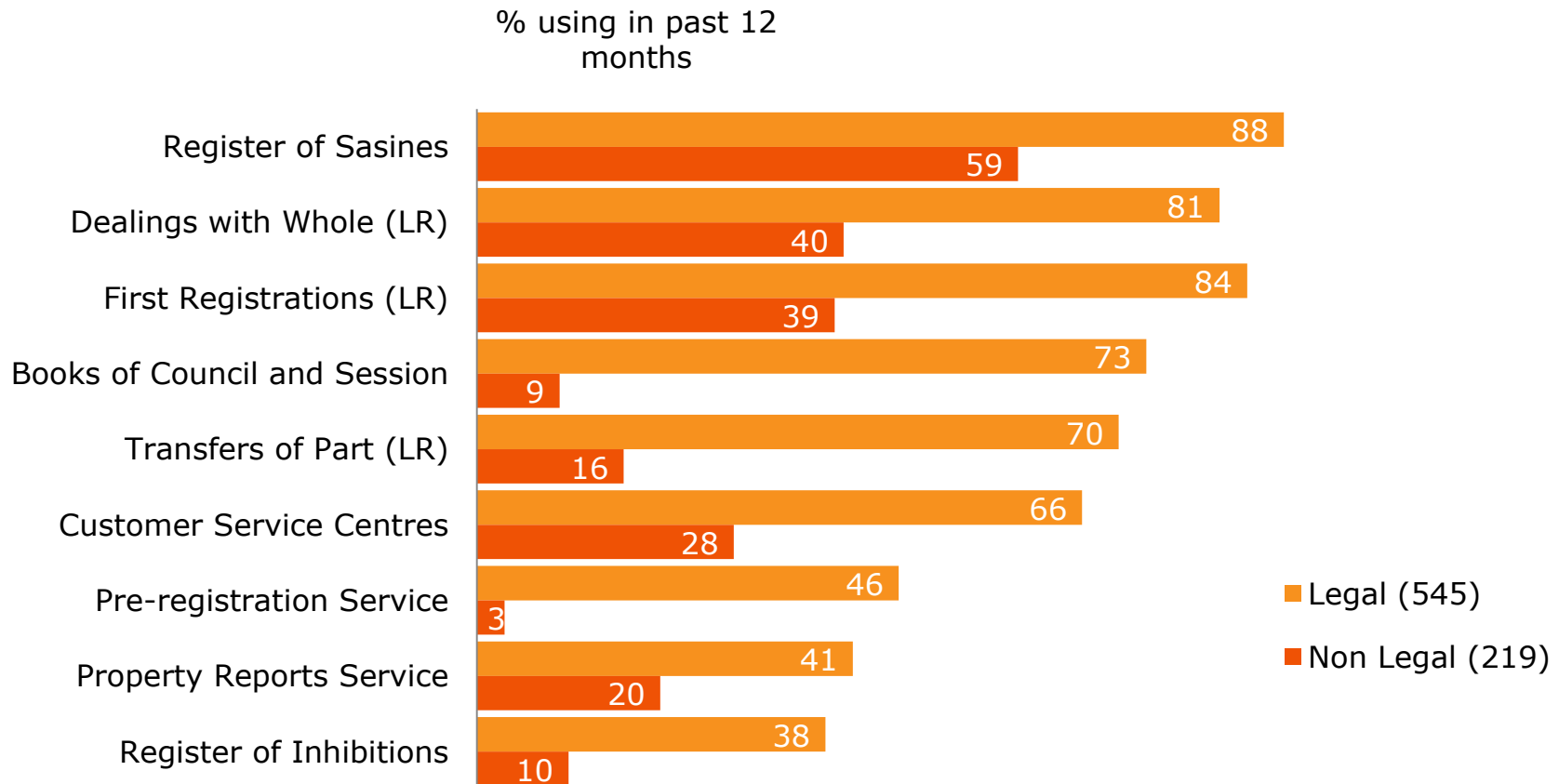


Average number of services used increased from 5.1 in 2012 to 5.4 in 2013, and has fallen back to 5.3 in 2013/2014.

Base: All respondents

Q10: Which of these ROS services have you used at all within the past year or so?

Same significant differences in usage according to whether legal or non-legal organisation



Base: All respondents in each type of firm

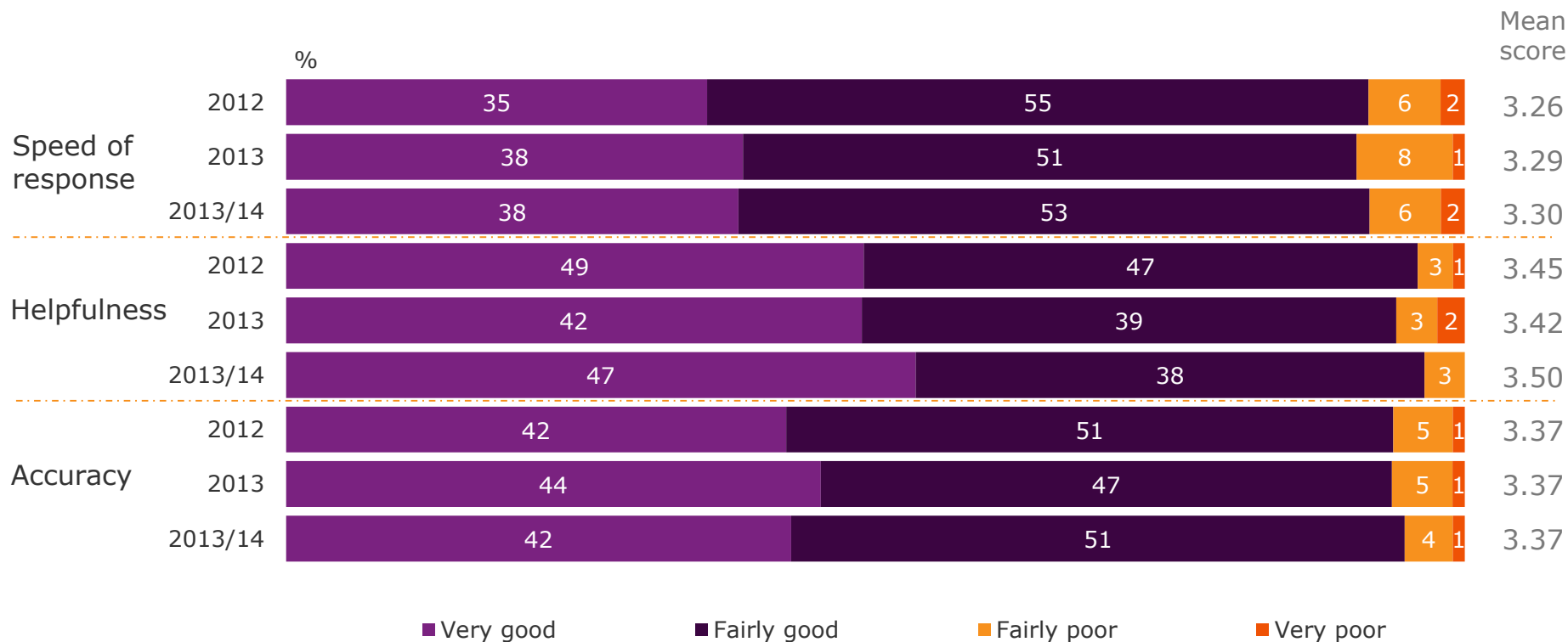
Q10. Which of these ROS services have you used at all within the past year or so?

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Performance of products/services (excluding online)

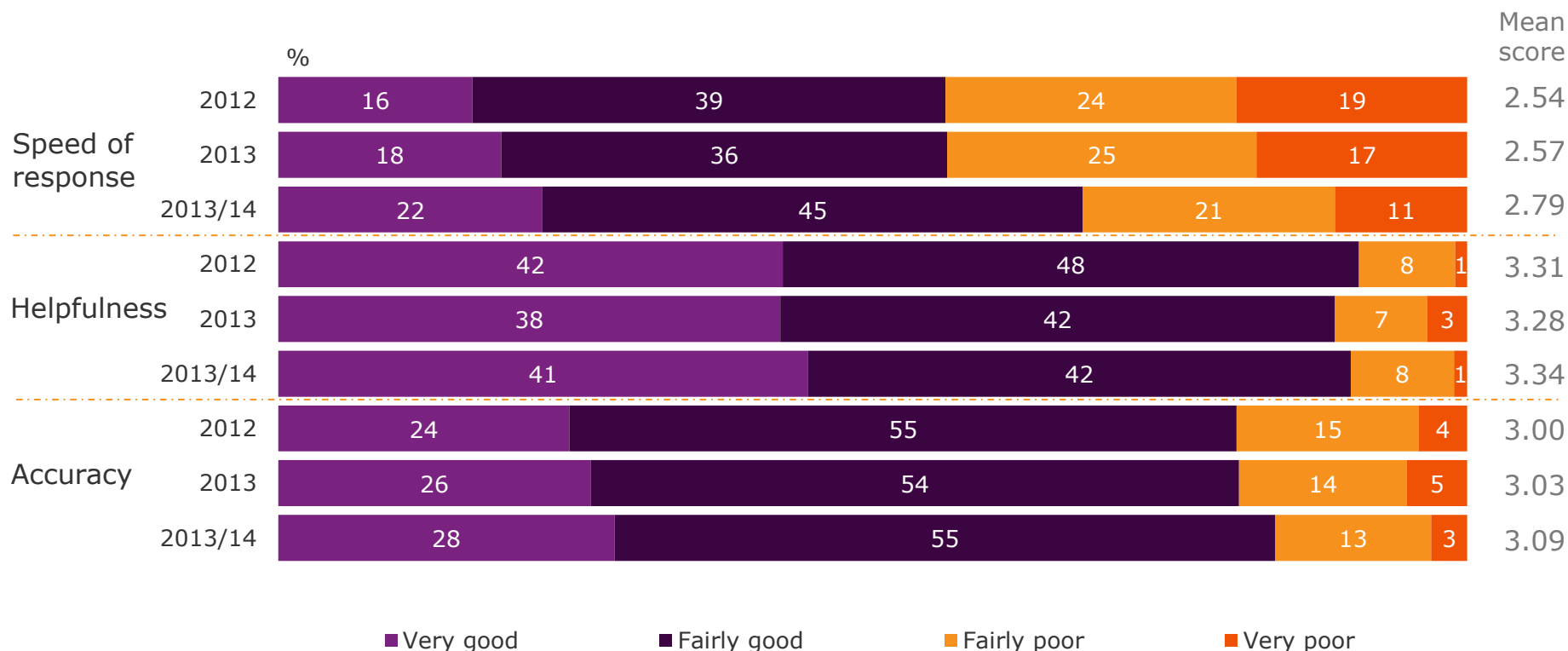


Register of Sasines: performance in all measures remains very strong, and helpfulness is marginally better in 2013/14



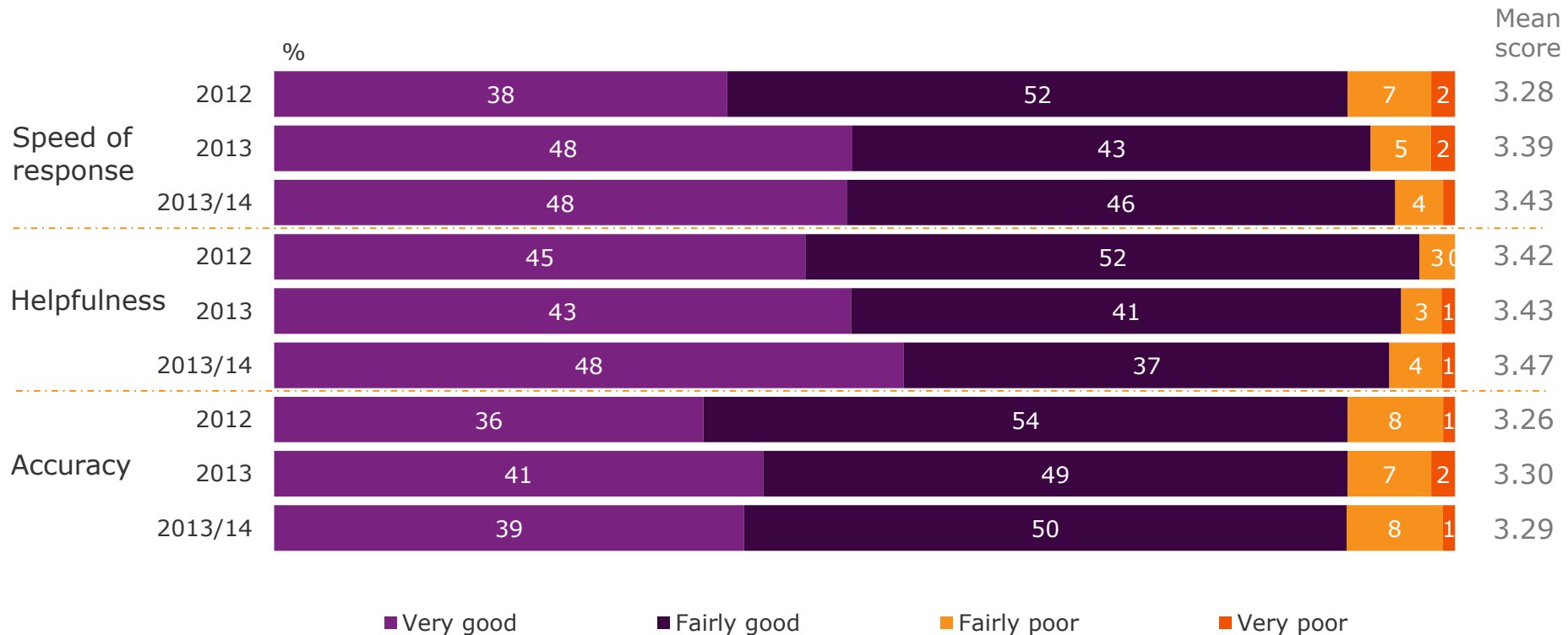
Base: All those using Register of Sasines (686/492/599)
 Q13: Thinking of Register of Sasines how would you rate it on?

First Registrations: Small improvements across all measures, but especially speed



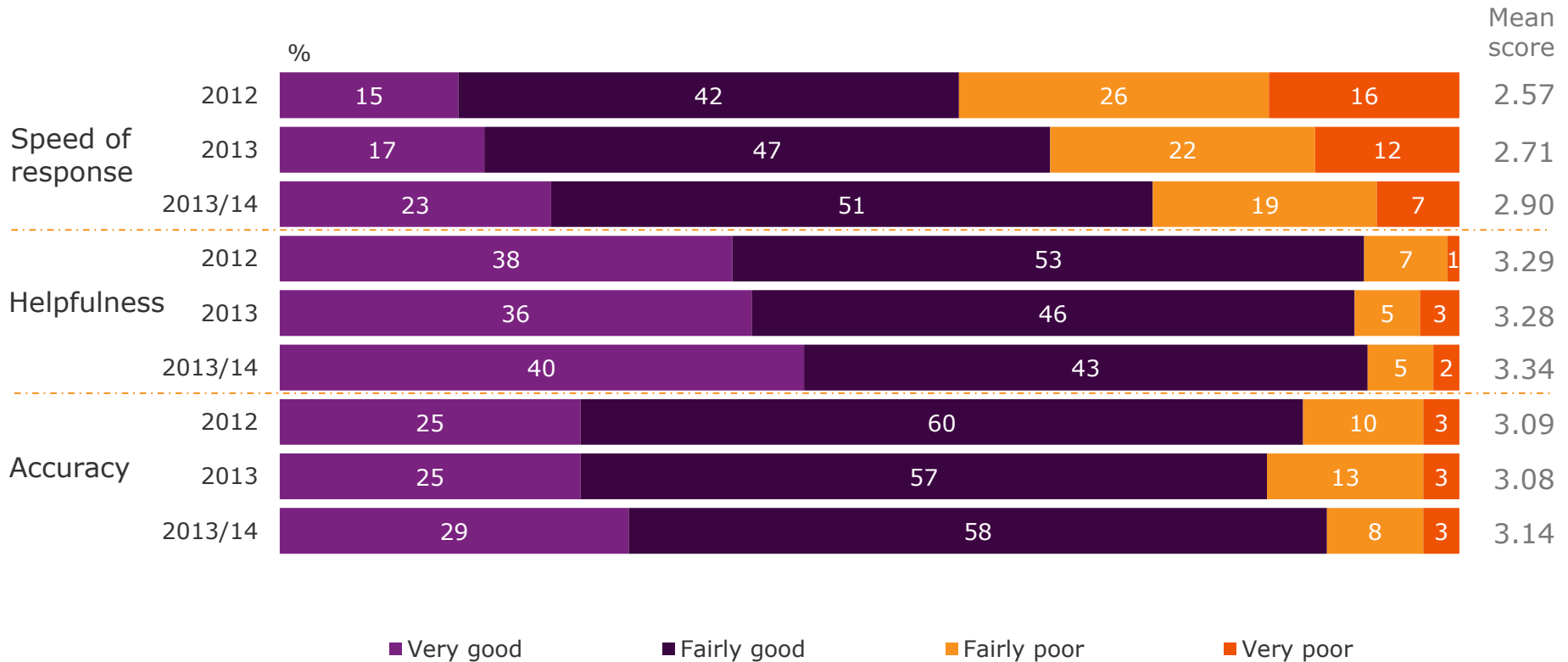
Base: All those using First Registrations (615/417/518)
 Q14: Thinking of First Registrations how would you rate it on

Dealings with Whole: very minor changes only for this strong performing service



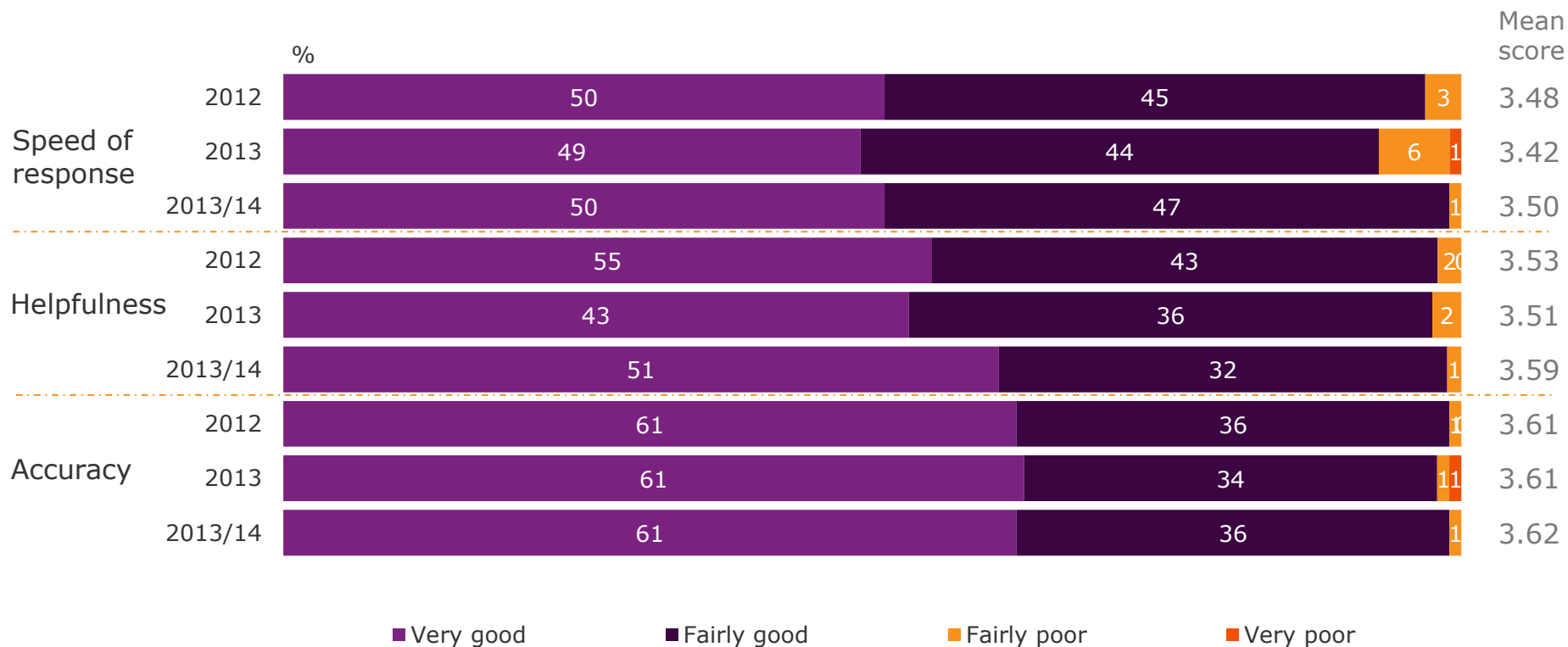
Base: All those using Dealing with Whole (607/422/507)
 Q15: Thinking of Dealings with Whole how would you rate it on

Transfers of part: Performance on speed continues to improve



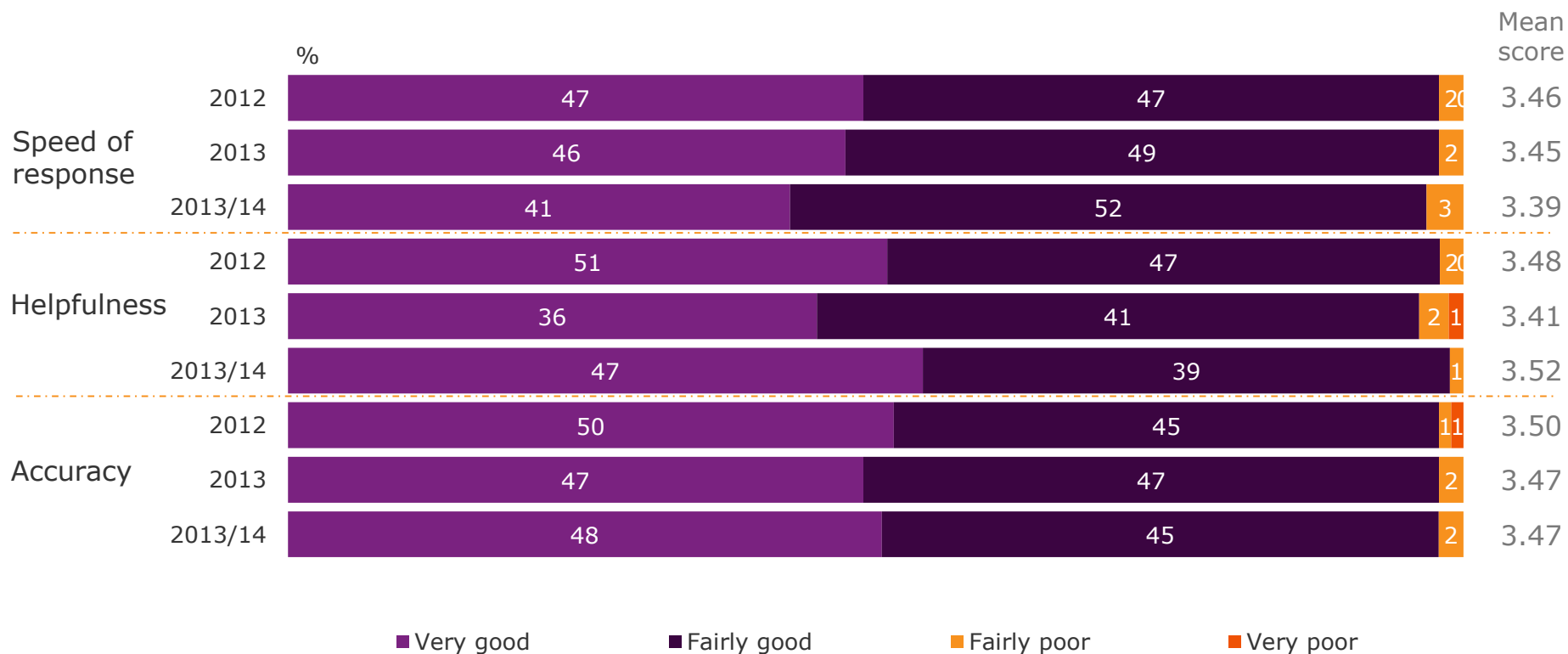
Base: All those using Transfers of Part (496/329/377)
 Q16: Thinking of Transfers of Part how would you rate it on?

Books of Council and Session: Results remain highly positive, and slight downward trend on speed noted last time, has been reversed



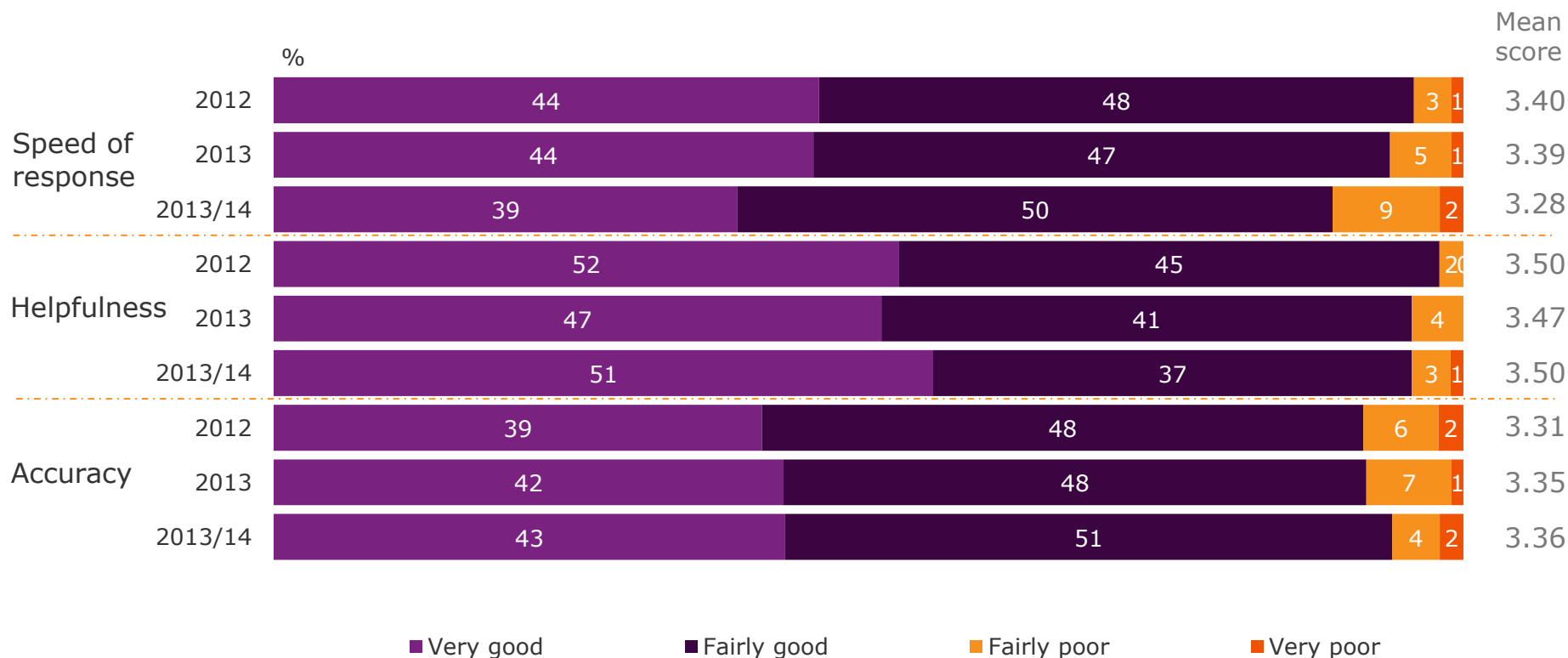
Base: All those using Books of Council and Session (490/307/370)
 Q17: Thinking of Books of Council and Session how would you rate it on?

Register of Inhibitions: This continues to be a strong performing area, with changes at latest wave comprising minor fall on speed and slight improvement on helpfulness



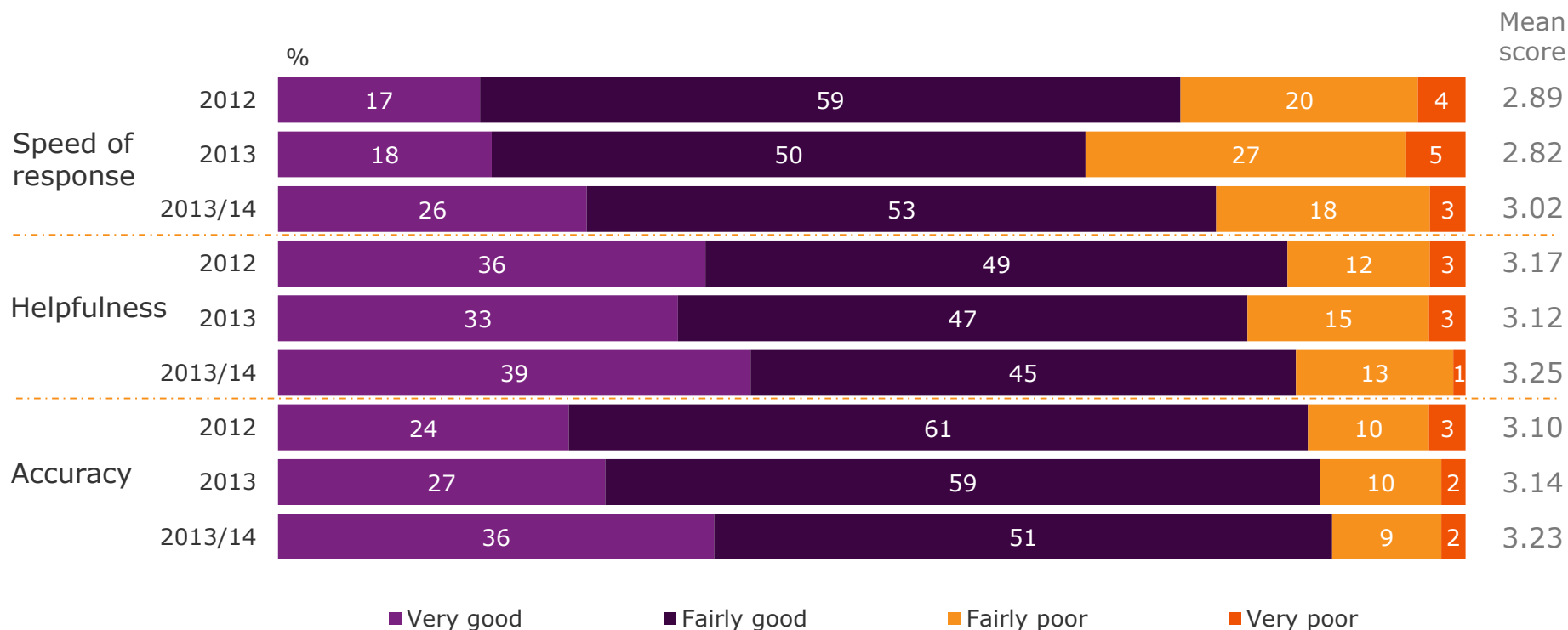
Base: All those using Register of Inhibitions (281/191/242)
 Q18: Thinking of Register of Inhibitions how would you rate it on?

Property Reports Service: Results again very positive, although slight fall on speed



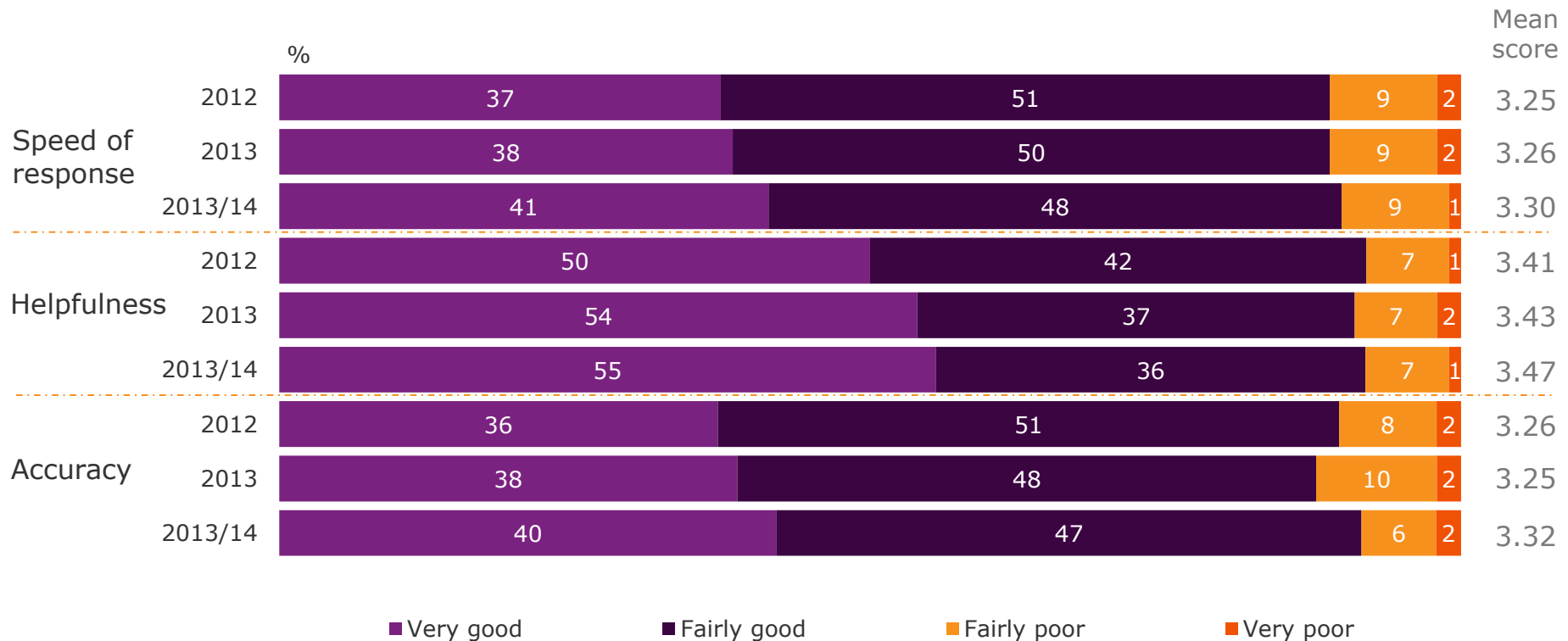
Base: All those using Property Reports Service (312/244/272)
 Q18: Thinking of Property Reports Service how would you rate it on?

Pre-registration Service: Views remain moderately positive rather than strongly so, but improvements across all measures, especially speed



Base: All those using Pre-registration Service (347/227/273)
 Q19: Thinking of Pre-registration Service how would you rate it on?

Customer Service Centres: Helpfulness remains the strongest element but accuracy has improved marginally



Base: All those using Customer Service Centres (525/341/409)
 Q20: Thinking of Customer Service Centres how would you rate it on?

Latest results (in green) show service areas with best improved performance on speed. Property Report Services highlighted (in red) showing decline

Mean scores (out of 5)	Speed of Response		
	2012	2013	2013/14
Books of Council and Session	3.48	3.42	3.5
Register of Inhibitions	3.46	3.45	3.39
Property Reports Service	3.40	3.39	3.28
Dealings with Whole (Land Register)	3.28	3.39	3.43
Register of Sasines	3.26	3.29	3.3
Customer Service Centres	3.25	3.26	3.3
Pre-registration Service	2.89	2.82	3.02
Transfers of Part (Land Register)	2.57	2.71	2.9
First Registrations (Land Register)	2.54	2.57	2.79

Base: All respondents using each service
 Q13-20: Thinking of [...] please rate this on SPEED using the scale shown

Perceptions of accuracy continue to show a high degree of consistency. Moreover where minor shifts have occurred these are in a positive direction

Mean scores (out of 5)	Accuracy		
	2012	2013	2013/14
Books of Council and Session	3.61	3.61	3.62
Register of Inhibitions	3.50	3.47	3.47
Property Reports Service	3.31	3.35	3.36
Dealings with Whole (Land Register)	3.26	3.30	3.29
Register of Sasines	3.26	3.37	3.37
Customer Service Centres	3.26	3.25	3.32
Pre-registration Service	3.10	3.14	3.23
Transfers of Part (Land Register)	3.09	3.07	3.14
First Registrations (Land Register)	3.00	3.03	3.09

Base: All respondents using each service
 Q13-20: Thinking of [...] please rate this on ACCURACY using the scale shown

The highest scores are recorded for helpfulness, and indeed the latest figures are marginally better across all service areas.

Mean scores (out of 5)	Helpfulness		
	2012	2013	2013/14
Books of Council and Session	3.53	3.51	3.59
Property Reports Service	3.50	3.47	3.50
Register of Inhibitions	3.48	3.41	3.52
Register of Sasines	3.45	3.42	3.50
Dealings with Whole	3.42	3.43	3.47
Customer Service Centres	3.41	3.43	3.47
First Registrations (Land Register)	3.31	3.28	3.34
Transfers of Part (Land Register)	3.29	3.28	3.34
Pre-registration Service	3.17	3.12	3.25

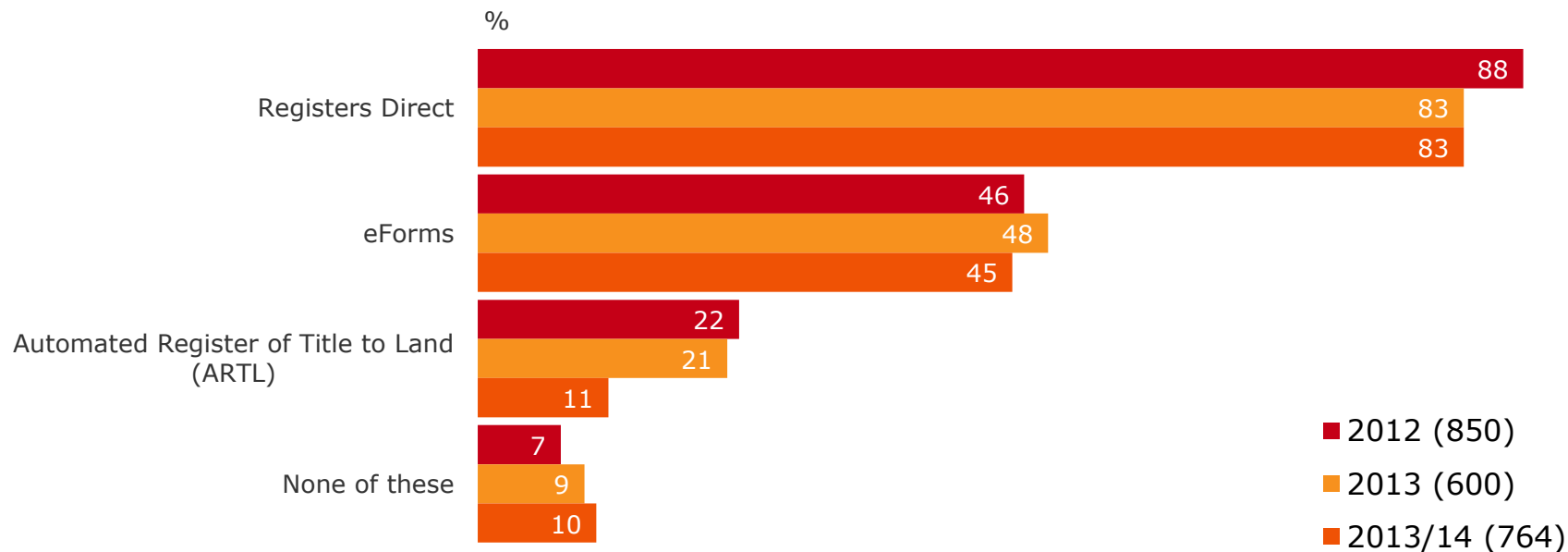
Base: All respondents using each service

Q13-20: Thinking of [...] please rate this on each of the following using the scale shown

Usage and performance of online services



Usage of Registers Direct and eForms remains the same as previously recorded: for ARTL usage has almost halved

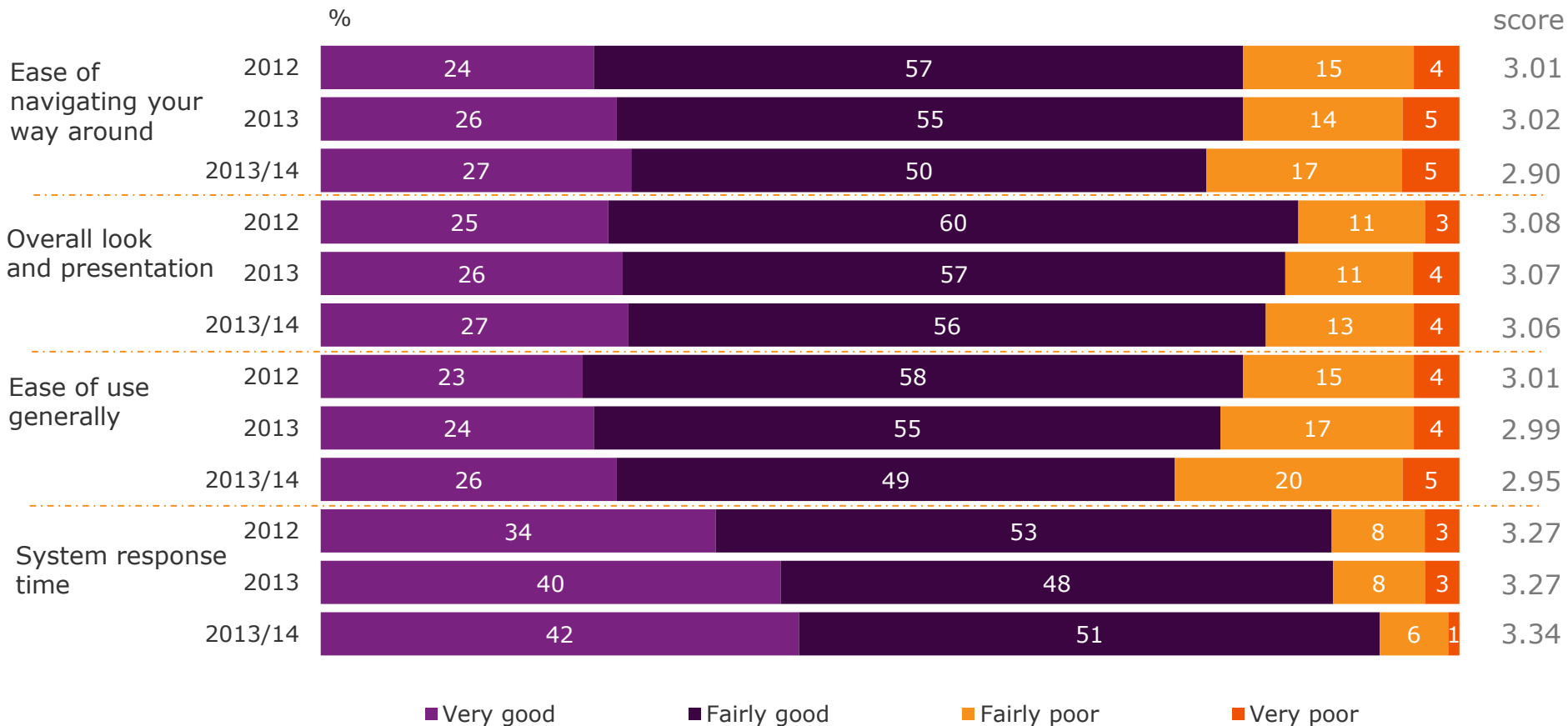


Base: All respondents

Q21: Which of these (online) services have you used in the past year or so?

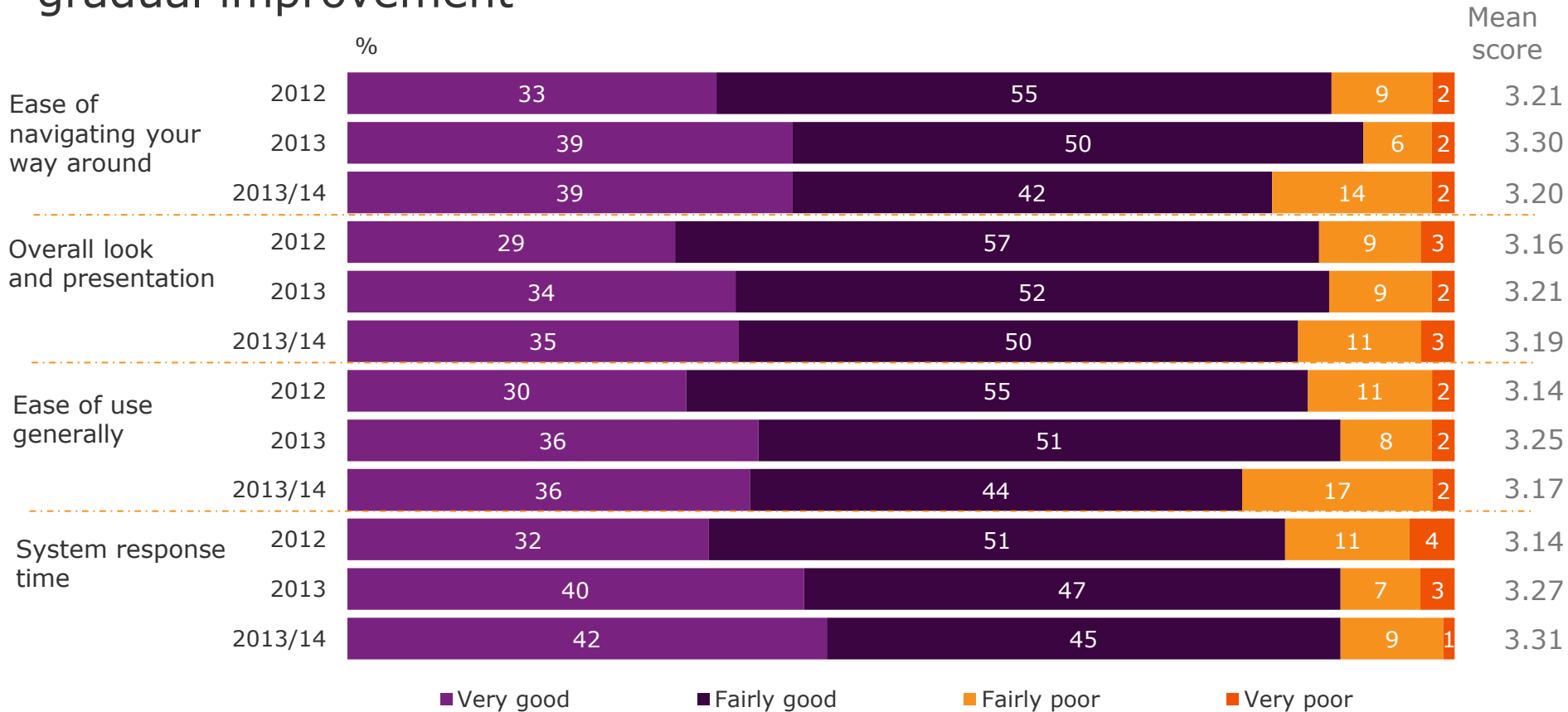
Registers Direct: Minor fluctuations recorded at latest wave: system response time continues to improve gradually although slight fall on ease of navigation

Mean score



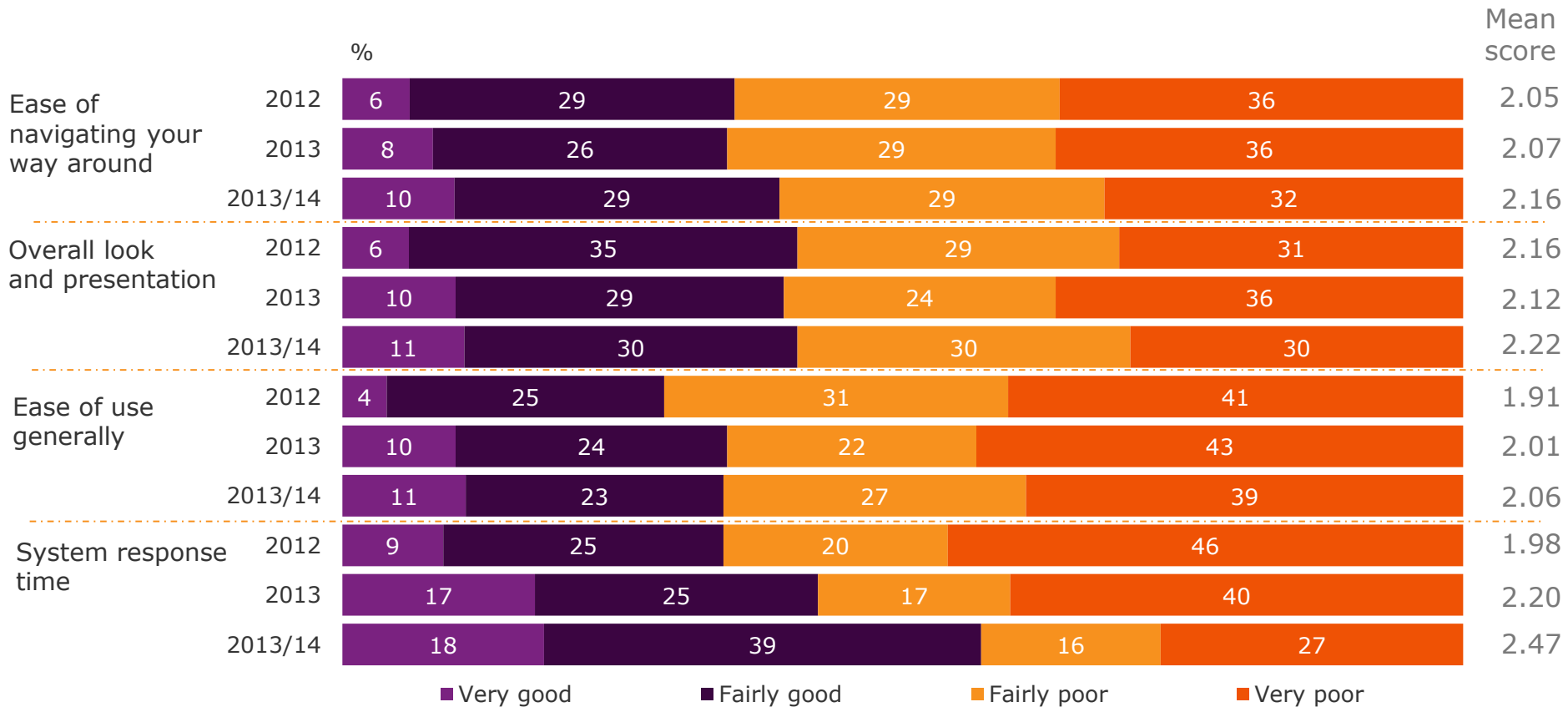
Base: All those using Registers Direct (743/497/640)
 Q25: Thinking of Registers Direct how would you rate it on?

eForms: Latest findings are generally consistent with only very small movements recorded: ease of navigation, and of use, have fallen slightly and system response time is continuing to show very gradual improvement



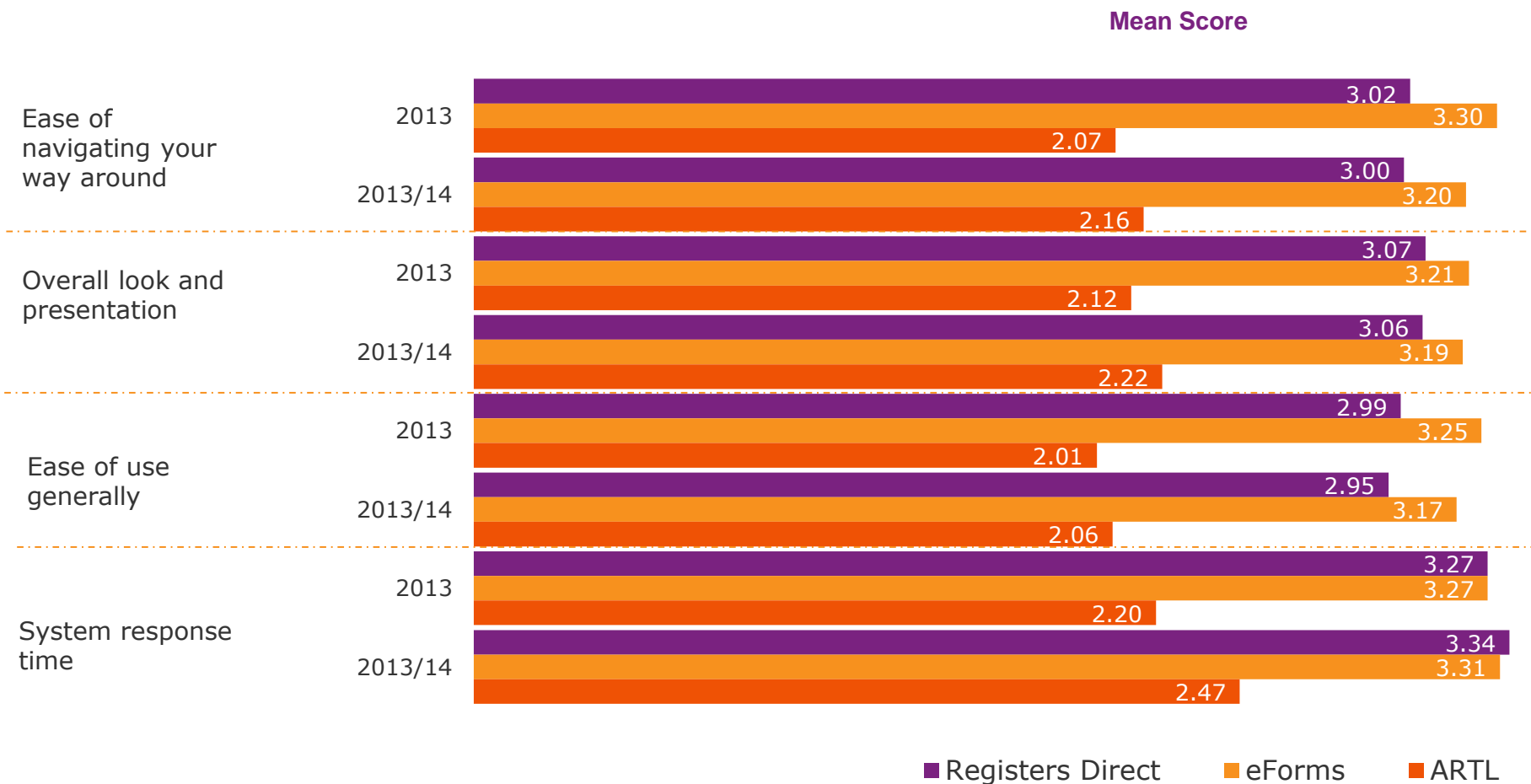
Base: All those using eForms (392/253/304)
 Q25: Thinking of eForms how would you rate it on?

Automated Register of Title to Land (ARTL): In context of weaker scores generally, performance is better at latest wave, particularly again for response time



Base: All those using Automated Register of Title to Land (ARTL) (190/103/72)
 Q25: Thinking of Automated Register of Title to Land (ARTL) how would you rate it on?

While ARTL scores remain well behind those of Registers Direct and eForms, progress is being made.

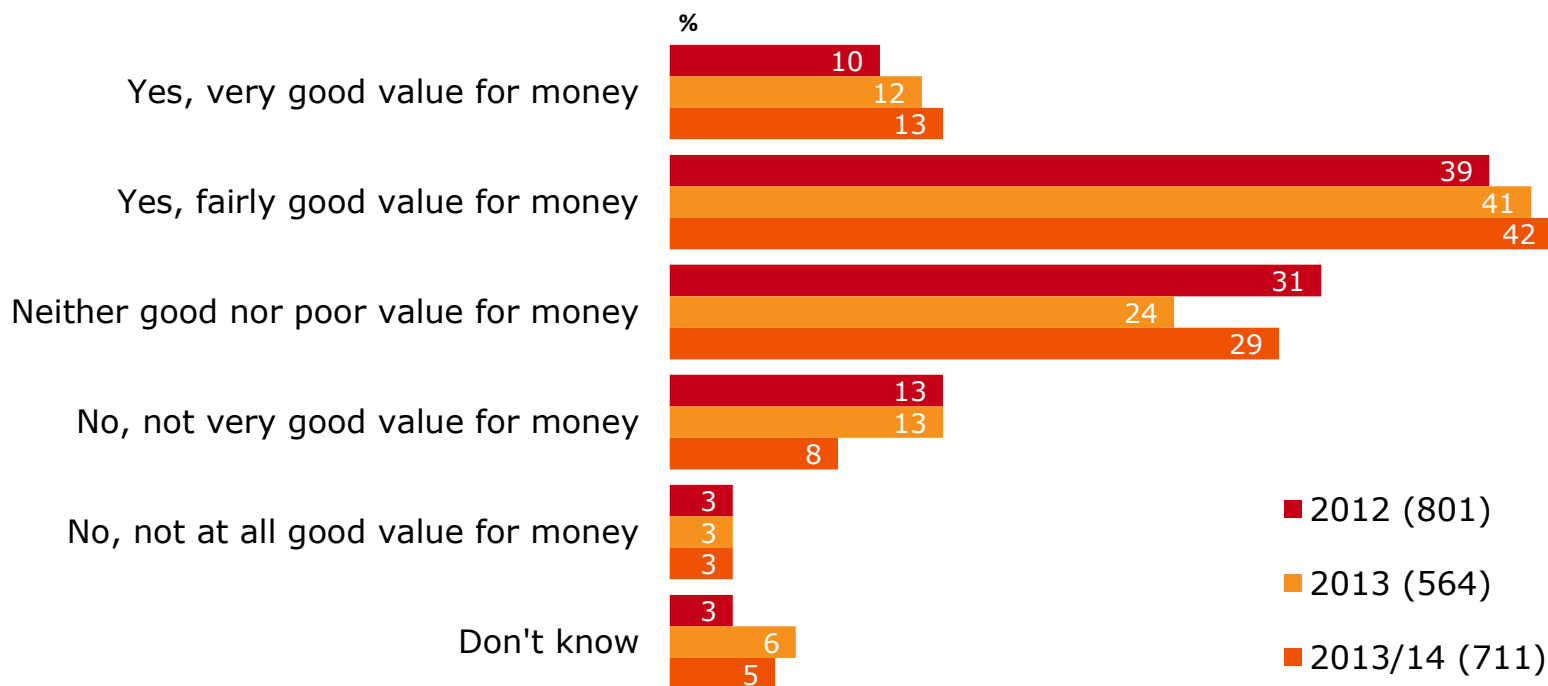


Base: All using services
Q25: Mean Scores

Value for money



Perceptions of value for money continue to improve, with fewer negative ratings and an increase in those undecided either way.



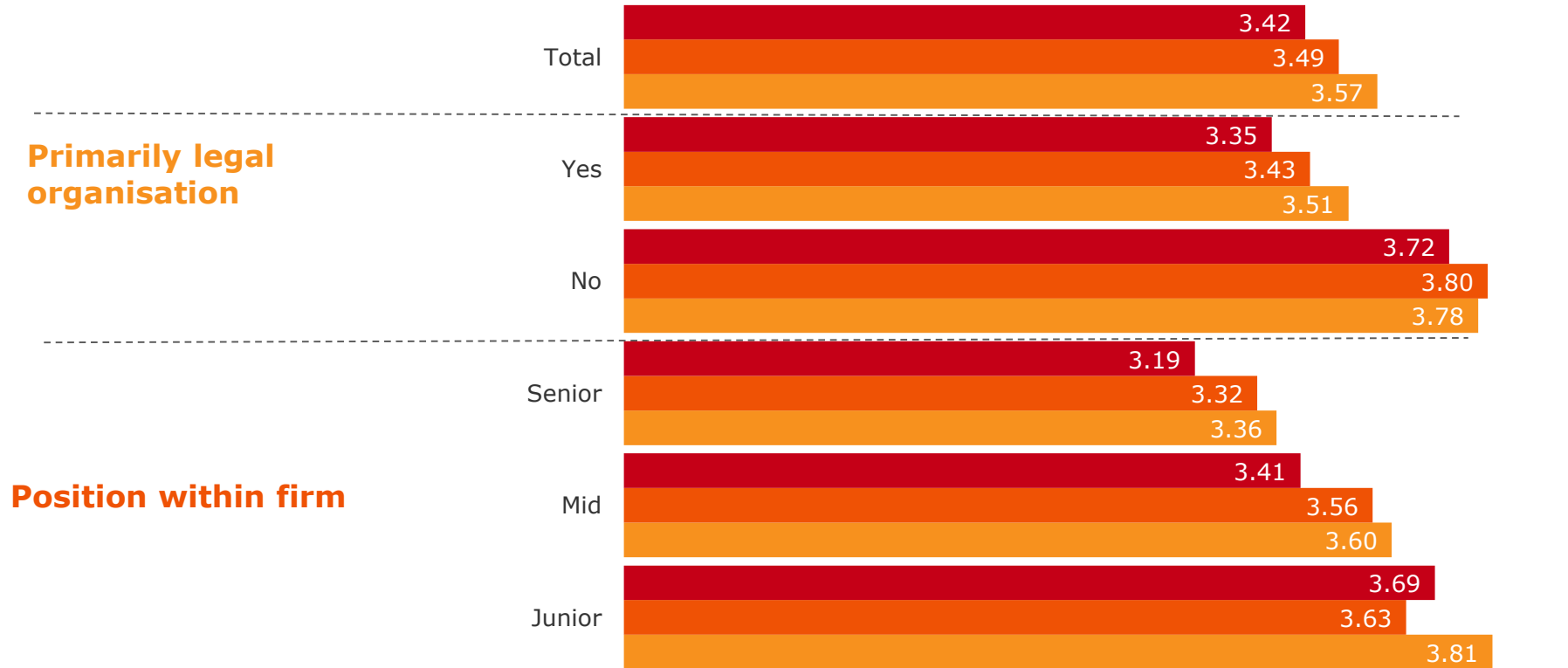
Base: All except those not familiar with fee levels

Q27: Generally do you think the ROS services that you use offer value for money?

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Improvement in perceived value for money driven by those in the legal sector, and more so by junior than mid or senior grade customers

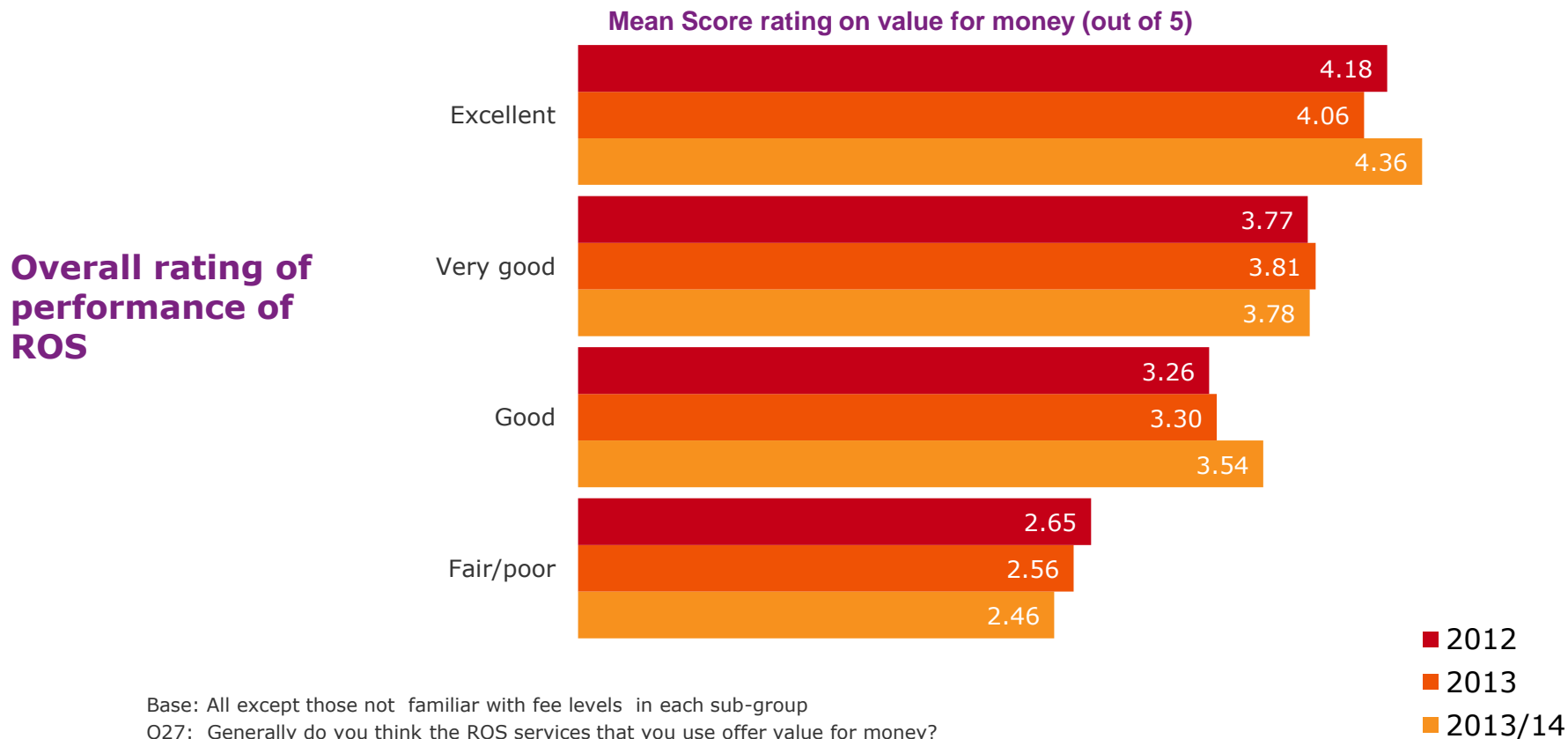
Mean Score rating on value for money (out of 5)



Base: All except those not familiar with fee levels in each sub-group
 Q27: Generally do you think the ROS services that you use offer value for money?

■ 2012 ■ 2013 ■ 2013/14

Views on value for money correlate highly with overall rating of ROS, as expected. At latest wave, improved VFM driven by those who regard ROS highly and moderately well. Conversely, among those with more critical opinions of ROS, value for money is increasingly less well regarded



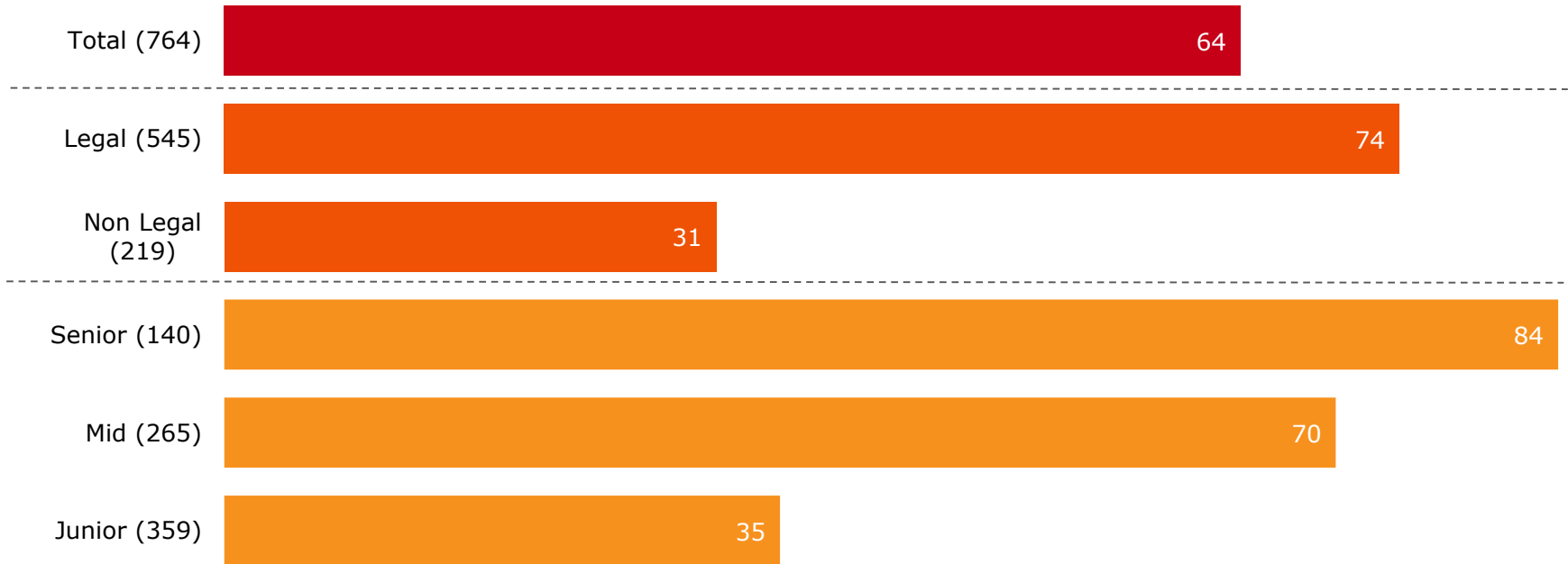
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Land Registration (Scotland) Act (Awareness and attitudes)



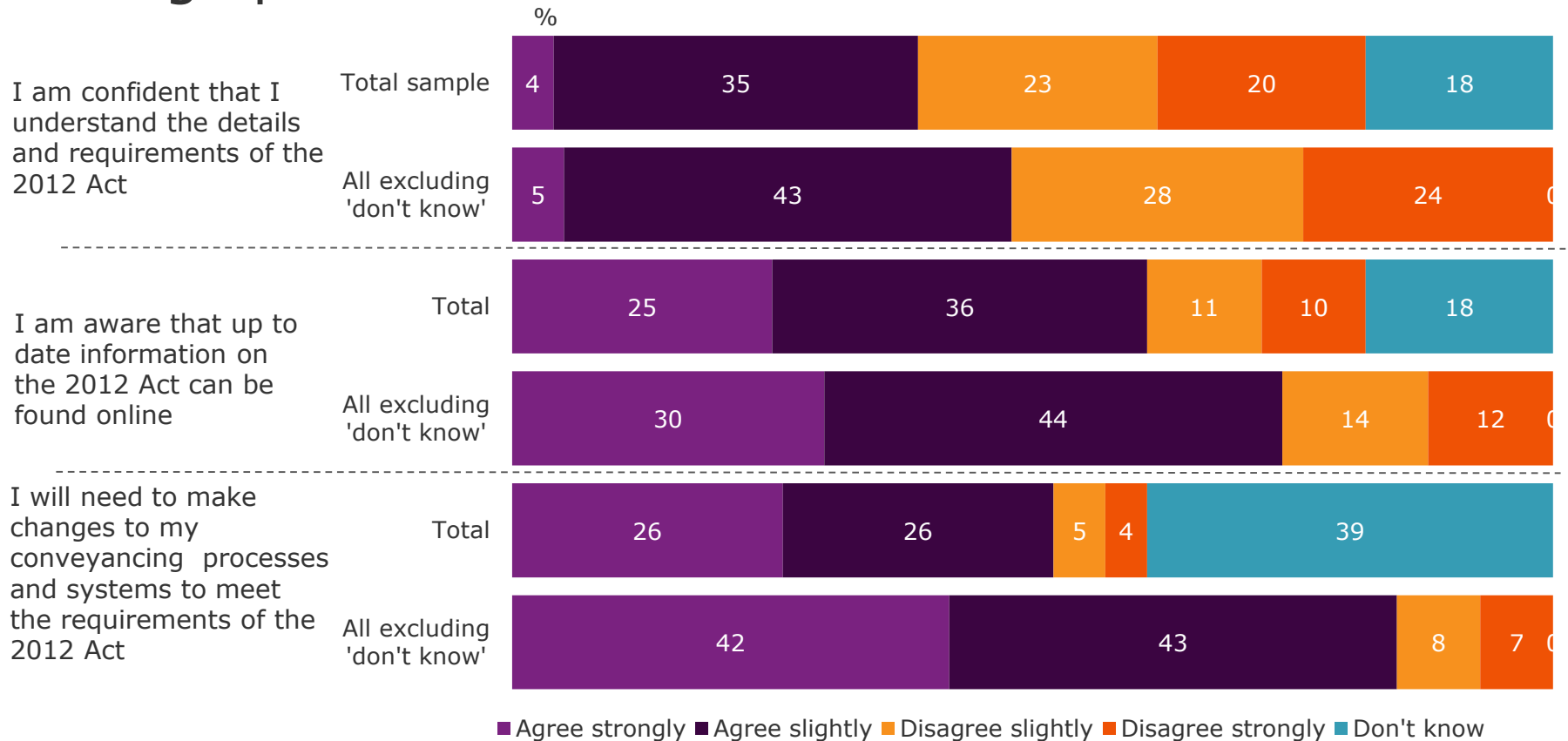
Around two-thirds are aware of the Land Registration (Scotland) Act 2012, although the figure is much lower among non-legal organisations, and linked to this, junior staff

% aware of Land Registration (Scotland) Act 2012



Base: All respondents in each group
Q28: Are you aware of the new Land Registration (Scotland) Act 2012?

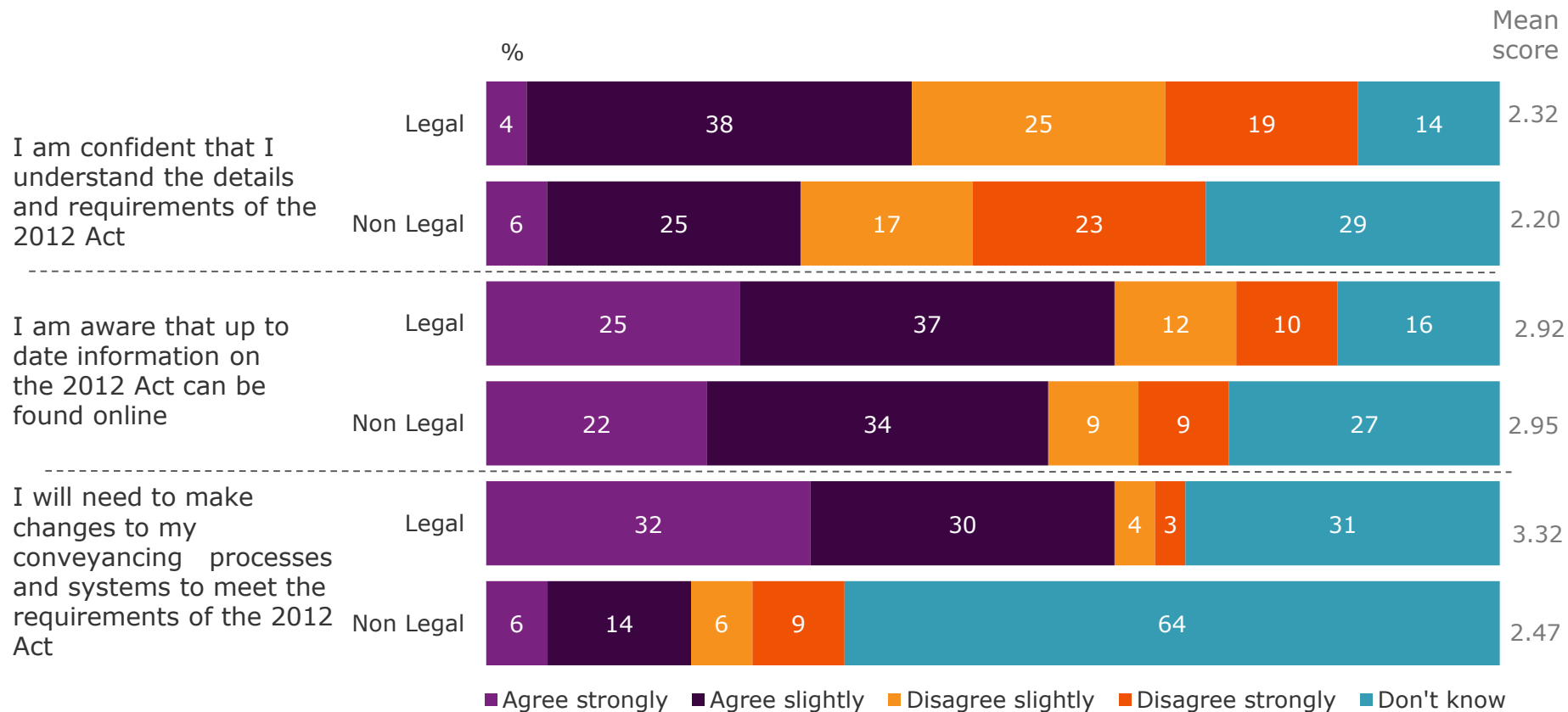
There is a significant lack of understanding of the Act, but many aware of online support, and of their need to change processes



Among total sample high level of 'don't knows' reflects lack of awareness of Act

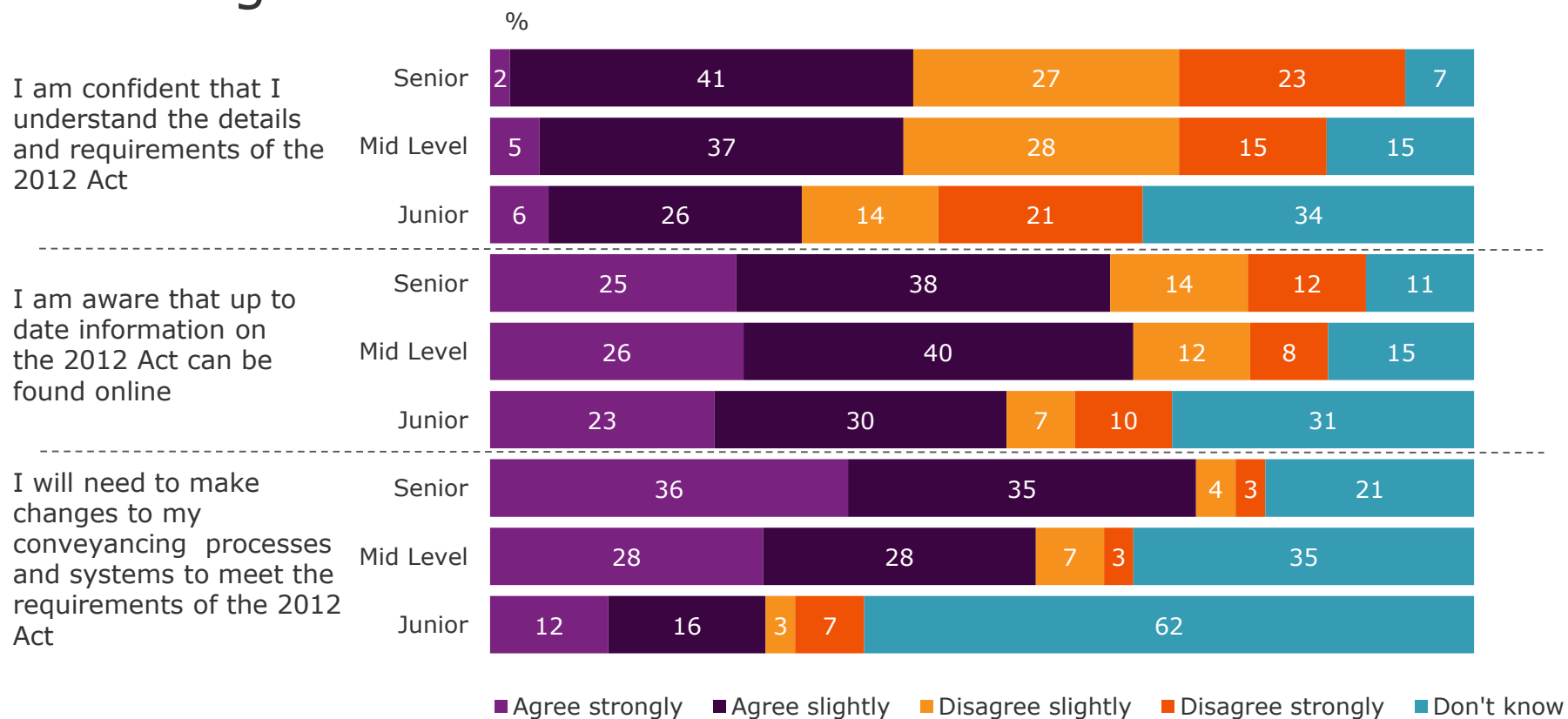
Base: All respondents (764) for total
Q29 How much do you agree or disagree that.....

Legal customers more likely to understand requirements and much more likely to agree for need to change processes. Awareness of support on website at a similar level for all types of organisation



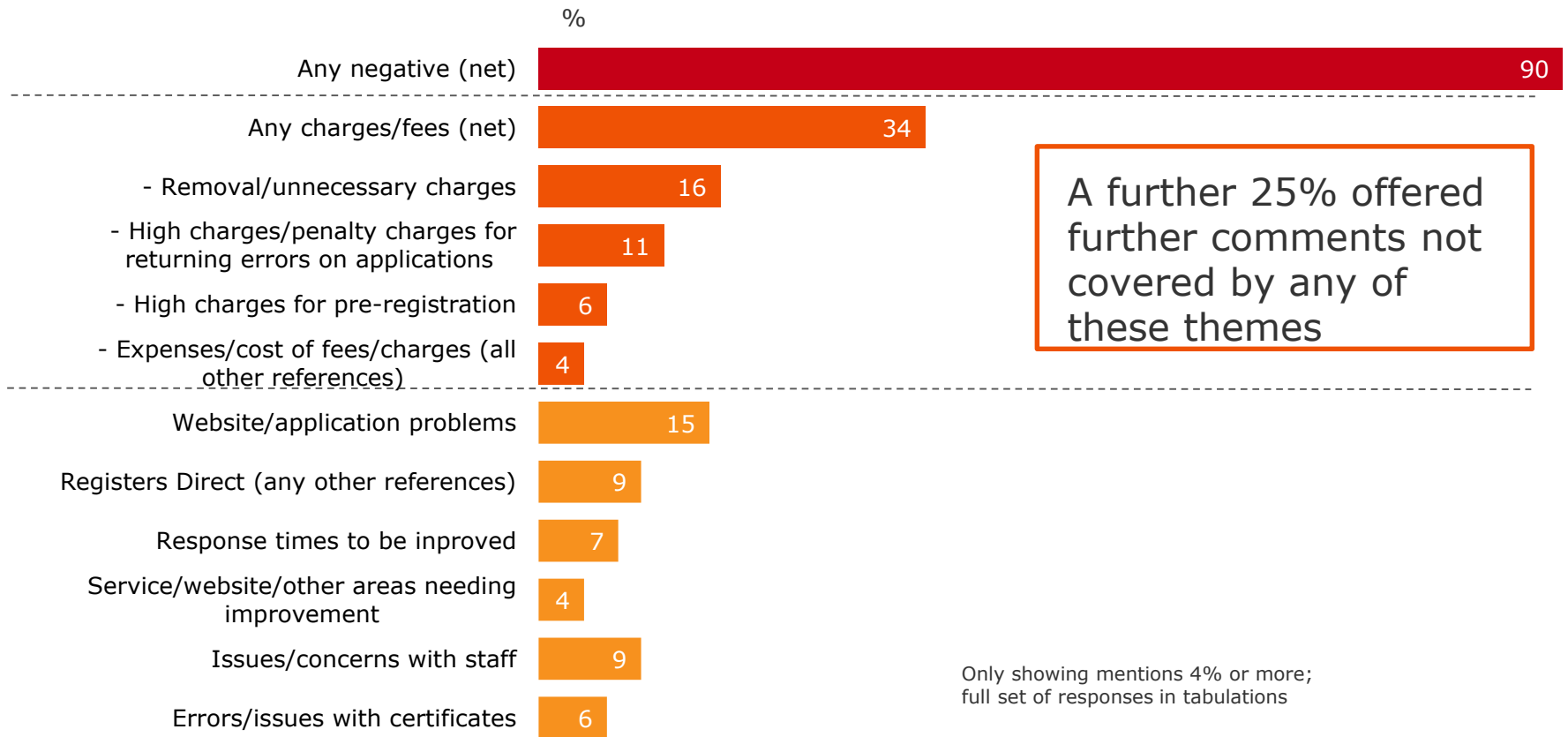
Base: All respondents (764)
Q29 How much do you agree or disagree that.....

Different levels of understanding reflect different grade profiles of legal/non-legal organisations. Key finding - almost half of senior customers lack detailed knowledge



Base: All respondents (764)
Q29 How much do you agree or disagree that.....

One third offered an additional comment. These are grouped into 'themes'. The vast majority are 'negative' and a third reference fees/charges



Base: All respondents who had any further comments
 Q30: Any other comments or thoughts you have on ROS products and services?

5

TNS BMRB

Point of view document



Insights

- The latest findings are very consistent with those obtained previously, demonstrated by the same Index figure of 72.
- More encouragingly, where minor shifts have occurred these have tended to be in a positive direction.
- Importantly too, whilst not true across all measures, many of the upward trends have been recorded for those working in a legal environment, and for those working at a senior level.
- The views of senior customers, do though remain well behind those of mid level and junior staff: the detailed spontaneous comments from this group highlight the strength of some of their concerns. Criticisms of charging/costs etc. are particularly widespread, which correlates with much weaker views towards value for money amongst those who regard the overall performance of ROS as only fair or poor.

Insights

- Feedback on each of the individual services follows a broadly similar pattern, with only minor fluctuations in evidence. However there does appear to be a trend of improved performance on speed of response/system response time for all areas, except Register of Inhibitions and Property Report Services.
- The new questions on Land Registration (Scotland) Act indicate that whilst a slight majority at the overall level are aware of it, there is scope for significantly improvement – even among senior staff.
- Furthermore there is considerable lack of confidence about the detail of the new Act – again among all types of customer.
- Whilst there is a reasonable level of awareness of online guidance on the Act the lack of detailed knowledge suggests it would be useful to sign-post/encourage greater usage.

ROS Annual Customer Survey 2013/14

Main Findings
29th January 2014

