



Foreword

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Through the UKCSI, The Institute has tracked the state of customer satisfaction in the UK since 2008. During this time we've seen significant change, with more challenging customers, and many sectors and organisations undergoing transformation. The essential components of great customer experiences haven't fundamentally changed during this time. However, in the January 2019 UKCSI I am delighted to share an expanded set of measures which reflect customers' priorities in the context of both their interactions and overall relationship with an organisation.

Customers continue to attach high importance to product or service reliability and quality and employee competence, attitude and helpfulness. In addition, our research has found that emotional connection, ethics and the sense that organisations genuinely build experiences around their customers' needs significantly influence customer satisfaction. As a result, this UKCSI contains new measures that give a richer understanding of current customer needs and priorities, whilst maintaining a consistent, robust benchmark of customer satisfaction performance.

This UKCSI shows a further slight fall in overall customer satisfaction. The number of customers who experienced a problem with an organisation has increased and is at its highest ever level. Fewer experiences were rated by customers as "right first time." The level of effort expended by customers in dealing with organisations increased slightly. However, satisfaction with complaint handling improved in most sectors. Without this improvement, the drop in overall customer satisfaction would have been more pronounced. Our evidence shows that consistently achieving the highest levels of customer satisfaction is strongly linked to trust, recommendation, reputation and business performance. Yet for many organisations, consistently delivering essential transactional customer experiences continues to be a challenge.

Across the 13 sectors measured by the UKCSI, the customer experience challenges are dynamic, unpredictable and often unforgiving. The Retail sector is experiencing intense structural change, driven by evolving customer preferences and economic pressures. In key regulated sectors there is growing scrutiny of organisations' customer satisfaction performance and a heightened expectation that regulators

or government act to tackle perceived underperformance. The local and national Public Services sectors continue to show a gradually improving trend in customer satisfaction, even as they contend with ongoing financial constraints, although there is a wide variety of performance across organisation types. The shared and gig economy continues to grow, challenging established organisations and business models, but coming under greater scrutiny in terms of employee and customer relationships. Across the UK economy, levels of employment are high but productivity and GDP growth remain stubbornly low. Meanwhile, Brexit continues to dominate the political agenda and generate uncertainty for organisations, employees and customers.

So how should organisations respond to this climate of stalling customer satisfaction, low growth, political and economic uncertainty?

I believe the UKCSI provides compelling evidence that the challenges of customer satisfaction, employee engagement, productivity and business performance are inextricably linked and require a sustained and joined-up focus. Delivering a consistent quality of right first time transactional experiences is fundamental to customer satisfaction and productivity. Our research also highlights broader relationship attributes that influence trust, satisfaction and advocacy of organisations. These include an emotional connection, ethics and a genuine customer ethos.

Achieving high levels of customer satisfaction that enable sustained business performance depends on developing a service-orientated culture in which leadership commitment, operational excellence, relationships and behaviours are rooted in an organisation's values and an understanding of customers' priorities. As we move forward in increasingly uncertain times, driving the customer agenda will become even more crucial. I firmly believe that the organisations who do this will survive and prosper.

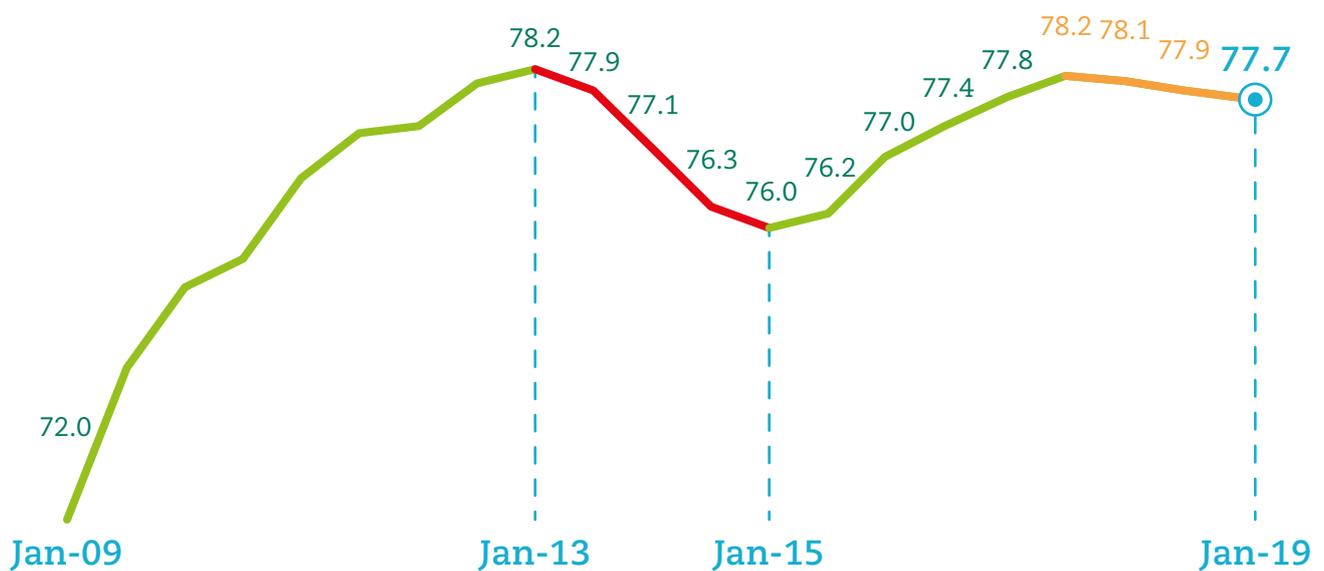
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Executive Summary

The UKCSI is 77.7 (out of 100), 0.4 points lower than a year ago and 0.2 points below July 2018

Though the decline in customer satisfaction is modest, it is the third consecutive drop. Customer satisfaction is at its lowest point since July 2016.



The proportion of customers experiencing a problem, 13.9%, is up by 1.2 percentage points compared to January 2018 and is at its highest ever level. The proportion of experiences rated as right first time has fallen, by 2.3 percentage points, to 78.5%. Satisfaction with complaint handling, 5.9 (out of 10), is at its highest ever level. However, complaint handling is emphatically the lowest scoring dimension of satisfaction in the UKCSI.

Customers' trust in the organisation they dealt with is stable. It has remained at 7.7 in six consecutive UKCSI reports dating back to July 2016.

The level of customer effort expended by customers in dealing with organisations is at its highest ever, 5.0. Although this measure has been broadly flat over the last two years, it is 0.5 points higher than in January 2016.

The January 2019 has been developed so that it reflects current customer needs and priorities, whilst providing a consistent benchmark of organisations' customer satisfaction performance

Our research¹ reaffirms that customers' most important stated priorities are for product / service reliability and quality, employee competence, attitude and helpfulness.

In addition, a range of emotional and relationship needs are strongly linked to overall customer satisfaction. They include feeling reassured, expectations consistently being met, promises being kept, trust and perceived reputation.

In this UKCSI, as well as continuing to report an overall index score, we have introduced a customer satisfaction scorecard of five dimensions reflecting the effectiveness of customers' interactions with organisations, as well as the quality of their overall relationship with an organisation. These dimensions enable a richer, more nuanced understanding of customer needs and priorities.



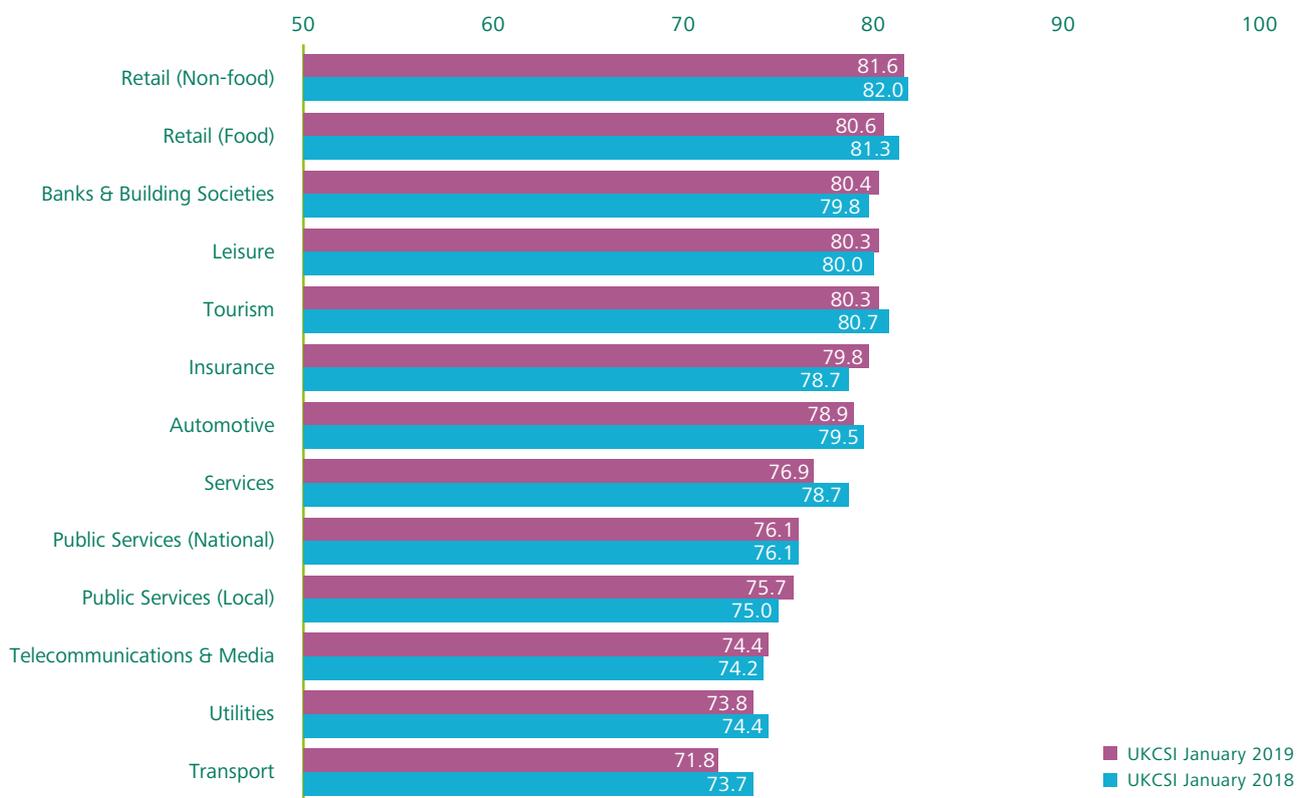
¹ More information about the customer priorities research is available in *Experiences, Emotions and Ethics: refreshing the customer priorities that underpin the UK Customer Satisfaction Index*, Institute of Customer Service, 2018. Available at www.instituteofcustomerservice.com/research

Only three sectors – Insurance, Services and Transport – have moved by more than one point compared to last year

Insurance is the only sector in which customer satisfaction has risen by at least one point.

Two sectors - Services and Transport - have fallen by more than one point. Customer satisfaction in the Transport sector, 71.8, is at its lowest since July 2009. Average satisfaction fell across each of the rail, air and coach / bus modes of transport. Rail companies suffered the largest average decline, of 2.2 points.

Insurance is the only sector in which customer satisfaction has risen by at least one point



first direct is the most highly rated organisation for customer satisfaction, followed by John Lewis, M & S (bank), Next and Amazon.co.uk

Jan-19 Rank	Organisation	Sector	Jan-19 Score	Jan-18 Score	Jan-18 Rank	Change in score Jan-18 to Jan-19
1	first direct	Banks & Building Societies	86.7	86.1	2	0.6 ▲
2	John Lewis	Retail (Non-food)	86.5	85.0	5	1.5 ▲
3	M & S (Bank)	Banks & Building Societies	86.3	84.7	7	1.6 ▲
4	Next	Retail (Non-food)	85.8	83.9	13	1.9 ▲
5 =	Amazon.co.uk	Retail (Non-food)	85.4	86.6	1	-1.2 ▼
5 =	Nationwide	Banks & Building Societies	85.4	84.7	7	0.7 ▲
7	Netflix	Leisure	85.1	82.8	24	2.3 ▲
8	Argos	Retail (Non-food)	84.1	81.4	46	2.7 ▲
9	Nationwide Insurance	Insurance	84.0	83.6	19	0.4 ▲
10	LV=	Insurance	83.9	81.7	42	2.2 ▲

▲ Increase in UKCSI score of less than one point

▼ Fall in UKCSI score

▲ Increase in UKCSI score of one point or more

Ratings for individual organisations across the full range of UKCSI measures and scorecard dimensions are available in the series of 13 sector reports published by The Institute alongside this UKCSI report².

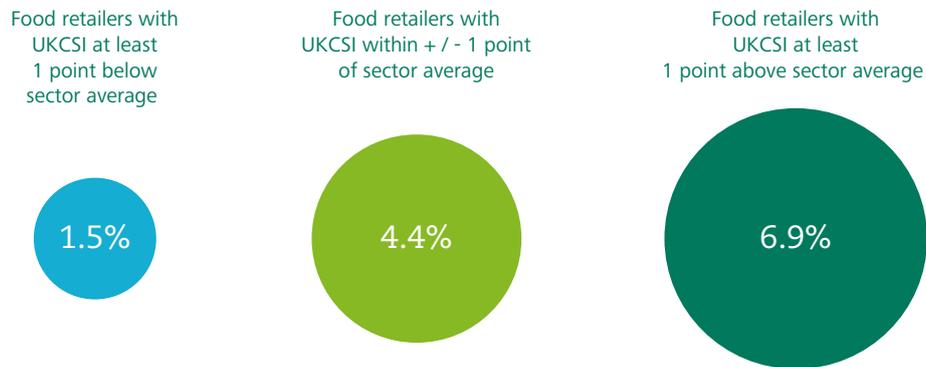
² Sector reports are available as a membership benefit for Institute organisational members; entitlement to sector reports varies by membership level. Sector reports are available for purchase by non members at www.instituteofcustomerservice.com/research

Achieving a 9 or 10 out of 10 for customer satisfaction gives a significant boost to trust, reputation, loyalty and recommendation

Organisations that score a 9 or 10 out of 10 for customer satisfaction are much more likely even than those achieving 8 out of 10 to earn the strongest levels of trust, reputation, loyalty and recommendation. This reinforces the crucial relationship between consistently high levels of customer satisfaction and sustainable business performance.



In the Retail (Food) sector, companies whose customer satisfaction was at least one point higher than the sector average earned average sales growth* of 6.9%, compared to 1.5% for those with lower than average satisfaction

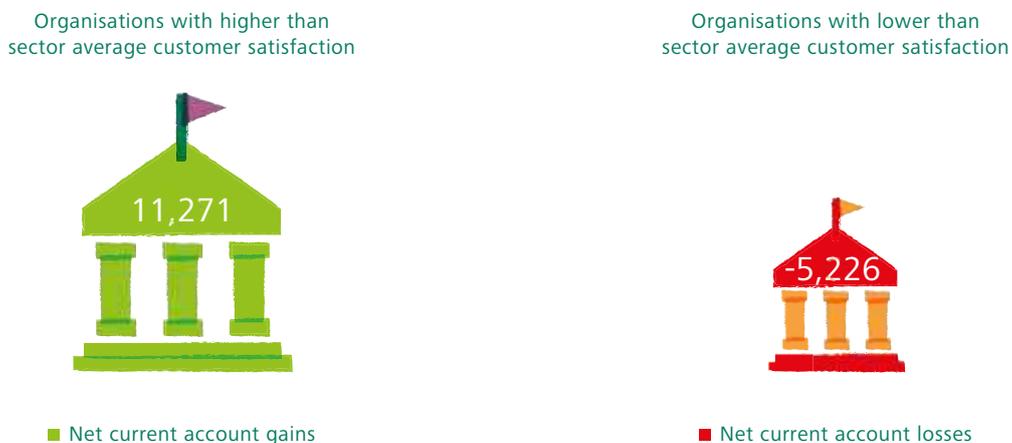


* Sales growth based on 12 weeks to 7 October 2018. Source: Kantar Worldpanel

Over the past two years, Banks with customer satisfaction that is better than their sector average have achieved more net current account gains** than those with below average customer satisfaction

This suggests that over a longer period, organisations' performance and reputation for customer service, as well as switching incentives, influence customers' decision to change their bank.

Average current account quarterly net gains and losses: Q1 2017 - Q2 2018



** Based on Current Account Switching Service Dashboard Issues 16 - 20

Recommendations about tangible ways that organisations can build and demonstrate emotional connection, customer ethos and ethics

Our new research into customers' priorities has highlighted both functional needs and a broader range of emotional and attitudinal attributes that influence relationships and satisfaction with organisations. They include feeling reassured; expectations consistently being met; promises being kept; an organisation's ethics; the sense that it designs experiences around the needs of its customers.

These attributes are difficult to influence directly and in the short-term. They are the outcome of an organisation's values, the way it conducts relationships with customers, employees, suppliers and partners and wider society and the extent to which it focuses on developing a genuinely service-orientated culture.

We recommend a number of tangible ways through which organisations can build and demonstrate emotional connection, customer ethos and ethical standards.



1 Leadership commitment



2 Employee engagement



3 Proactive engagement and commitment with customers



4 Ethics and impact on society



5 A long term focus on quality of customer experiences and relationships

<p>1) Leadership commitment</p>	<ul style="list-style-type: none"> • Publish the organisation’s customer service strategy, objectives and results • Publish employee engagement results and show the link to customer satisfaction • Ensure that there is board-level accountability for customer service performance • Link executive pay and incentives to customer service performance • Ensure that all employees have personal objectives linked to their impact on customer service performance • Select suppliers and partners that share and demonstrate a commitment to the organisation’s customer ethos • Give priority to investing in and developing colleagues.
<p>2) Employee engagement</p>	<ul style="list-style-type: none"> • Bring vision and values to life in a way that can be understood by everyone in the organisation • Equip managers with the skills to engage effectively with employees • Authentic, regular, relevant communications with employees • Enable a genuine employee voice • Ensure every employee has appropriate training and a personal development plan • Recognise excellent customer service performance.
<p>3) Proactive engagement and communication with customers</p>	<ul style="list-style-type: none"> • Proactively engage with customers in designing products and services • Ensure consistency between the tone and content of brand communications and the quality of customer experience • Be transparent about how customer data is collected, used and stored • Deploy customer data and insight in a way that genuinely enhances personalisation and relevance • Develop plans to react quickly in crisis situations to provide customers with relevant information, advice and reassurance • Provide clear routes for customers to give feedback and be receptive to the feedback received • Ensure artificial intelligence is deployed to improve customer experiences, not just to drive efficiencies.

4) Ethics and impact on society

- Fair pay for all employees, for example ensuring that all employees receive a living wage
- Ensure fair pay and working conditions for employees throughout the organisation's supply chains
- Fair and transparent pricing and contracts for all customers
- Be seen to pay reasonable levels of tax
- Actively recruit and create employment opportunities in communities the organisation serves, or where it has significant operations
- Ensure all employees have appropriate personal development plans that improve their career opportunities
- Support community or education projects that are aligned to the organisation's purpose and values, especially in communities the organisation serves, or where it has significant operations.

5) A long-term focus on quality of customer experiences and relationships

- Ensure that customer journeys and experiences are based around customers' priorities
- A persistent focus on getting things right first time
- Proactively identify ways to reduce customer effort
- Enable consistency of channels and understand causes of variation in customer experience across channels
- A heightened focus on the context of "moments of truth" that require high levels of empathy, discretion and judgement, such as complaints, high value purchases, bereavement and significant changes in personal circumstances
- Root cause analysis and proactive action to prevent problems occurring.

1

Understanding
customers'
priorities

For January 2019, the UKCSI has been developed to ensure that it reflects current customer needs and priorities, whilst providing a consistent benchmark of organisations' customer satisfaction performance

The benchmark measures in the UKCSI are based on research into customers' priorities – key attributes that influence customers' attitudes about their interactions and relationships with organisations.

In August and September 2018, The Institute undertook fresh research to ensure that the UKCSI continues to be rooted in relevant, current customer needs and priorities and that it measures both customers' transactional and relationship needs.

We also aim to maintain a consistent, robust set of measures providing an independent benchmark of organisations' customer experience performance and insight about how to achieve consistent levels of customer satisfaction and engagement.

In this UKCSI we have set out the key findings from our research into customers' priorities and how they have been implemented in the UKCSI. More information about the customer priorities research, including how priorities vary by sector, is available in *Experiences, Emotions and Ethics: refreshing the customer priorities that underpin the UK Customer Satisfaction Index*³.

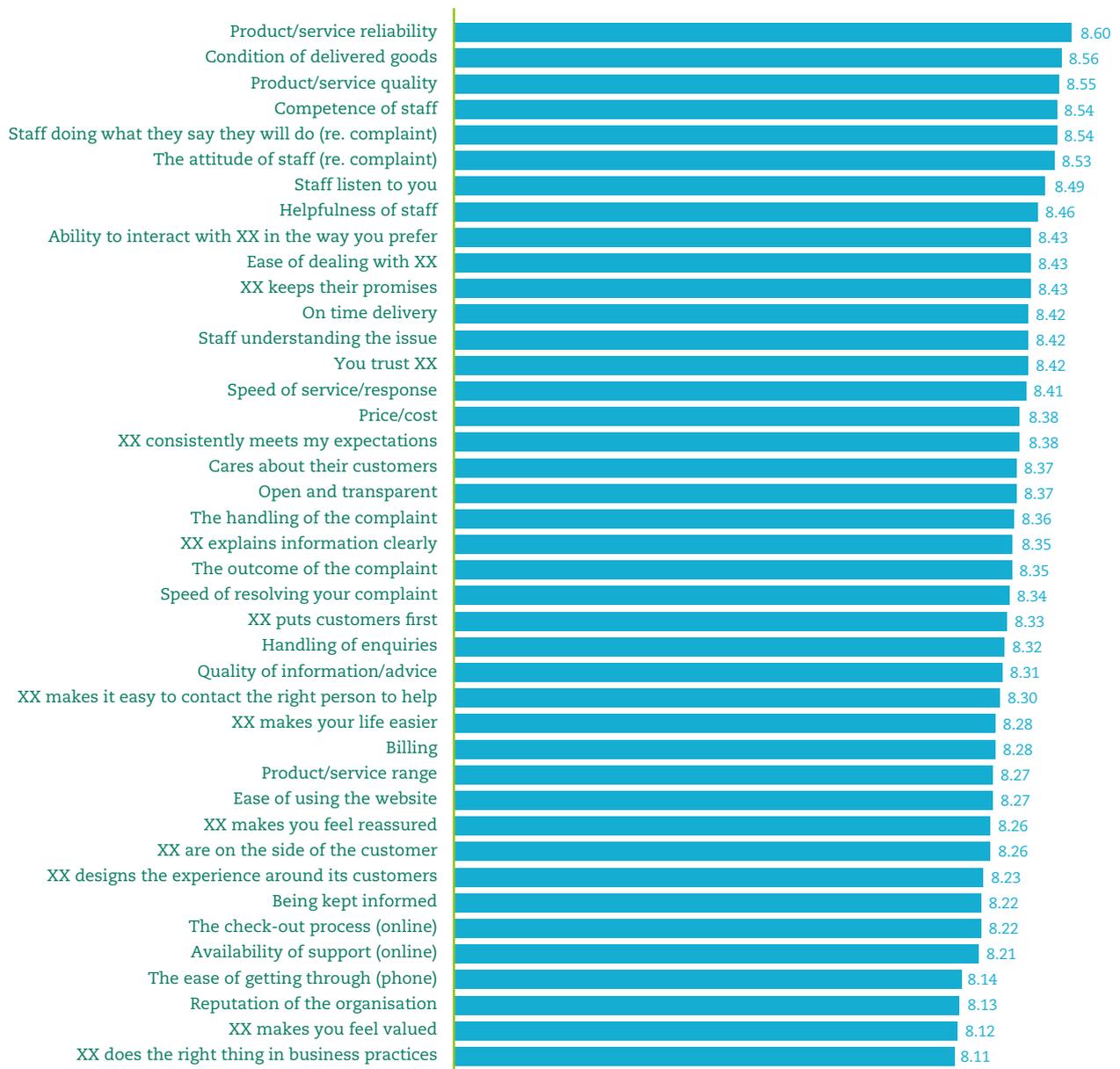


³ Available at www.instituteofcustomerservice.com/research. It is free for Institute organisational members and available for purchase by non members.

Customers' most important stated priorities are product / reliability and quality, employee competence, attitude and helpfulness

Customers were asked to rate the importance of key customer experience attributes on a scale of 1 - 10. Our research shows that importance ratings customers give to a range of attributes are relatively unchanged compared to the last time we conducted research into customer priorities in 2015.

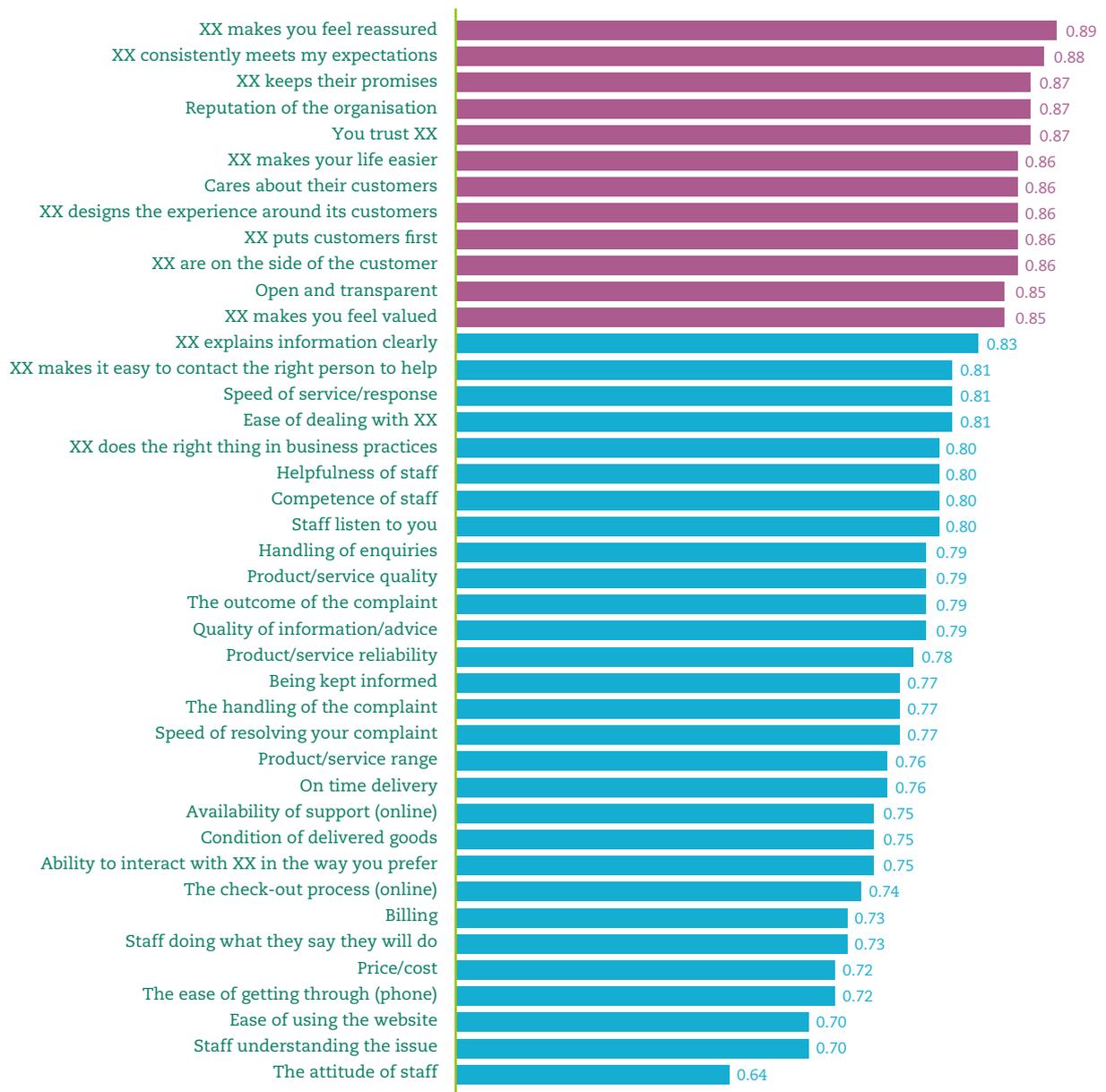
Customers' most important stated priorities



In addition to these priorities a range of emotional and relationship needs are strongly linked to overall customer satisfaction

These emotional and relationship needs do not necessarily have an obvious stated importance but they show a strong relationship to overall customer satisfaction. They include feeling reassured, expectations consistently being met, promises being kept, trust and perceived reputation.

Strength of correlation with overall satisfaction



Developing the UKCSI to reflect customers' priorities

As a result of our fresh research into customer's priorities we have made some changes to the January 2019 UKCSI.

Most of the UKCSI measures are unchanged. A small number of measures have been removed either because they have relatively low impact on overall satisfaction or because their content is sufficiently covered by other measures.

We have also introduced a customer experience scorecard that reflects both transactional and relationship needs.

As well as reporting an overall index score based on customers' responses across the full range of measures, the UKCSI features index scores for five distinct dimensions. These dimensions will be incorporated in the UKCSI resources published by The Institute.



Experience

Measures the quality of customers' experiences and interactions with organisations



Complaints

How organisations respond and deal with problems and complaints



Customer Ethos

Extent to which customers perceive that organisations genuinely care about customers and build the experience around their customers' needs



Emotional Connection

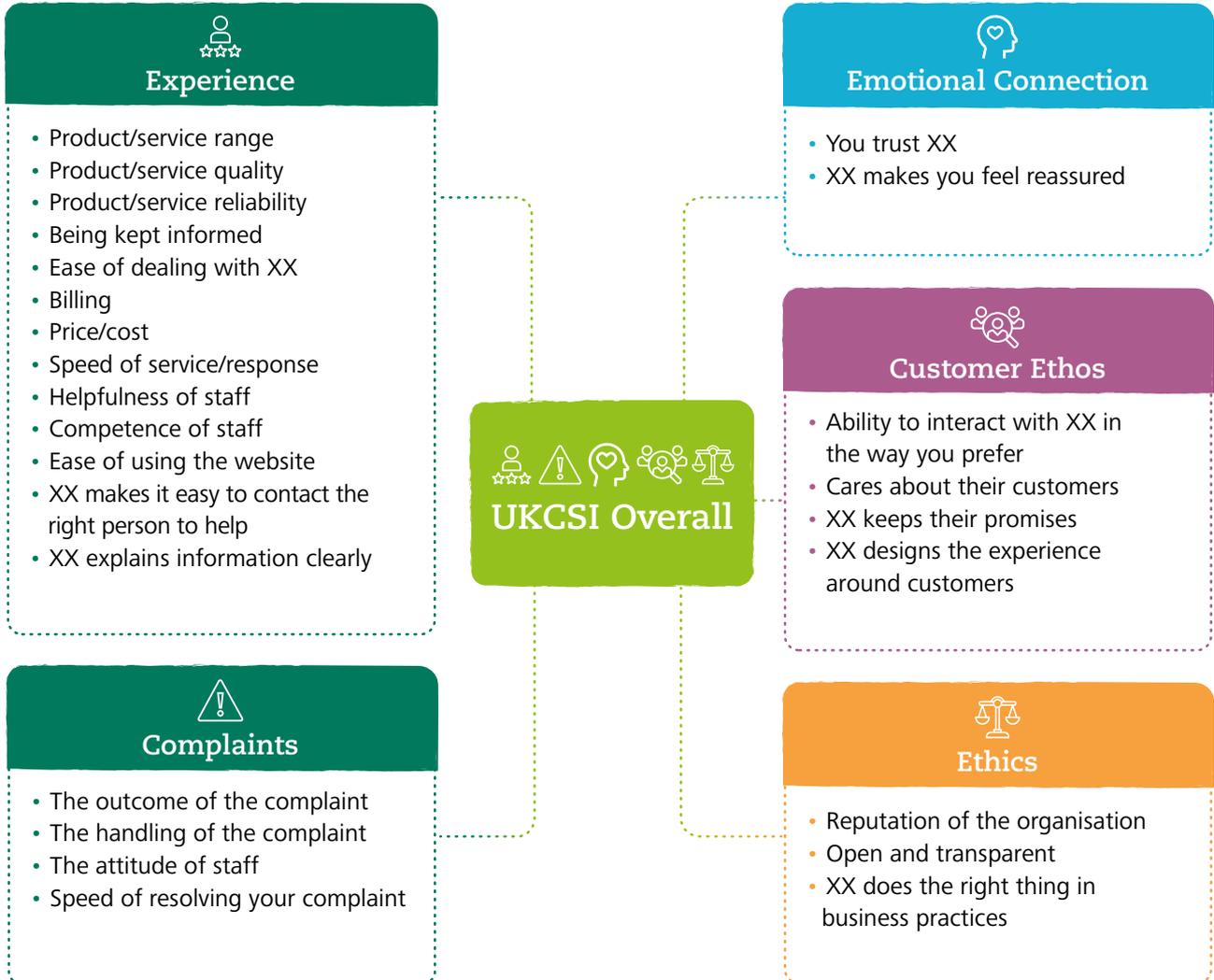
The extent to which an organisation engenders feelings of trust and reassurance



Ethics

Reputation, openness and transparency and the extent to which an organisation is deemed to "do the right thing"

UKCSI Scorecard



How have the refreshed customer experiences affected the January 2019 UKCSI results?

Each UKCSI is based on two sets of customer data, typically surveyed in the preceding March / April and September / October, in order to give a rolling view of customer satisfaction.

The January 2019 UKCSI is based on data collected in March / April 2018 using the previous questions and measures and the most recent data collected in September / October 2018 which are based on the refreshed questions and measures. As a result, the January 2019 UKCSI is based on a broader and slightly modified set of measures compared to the previous UKCSI reports. The year on year or longer term trend changes described in this report are based on the measures that have been retained in the January 2019 UKCSI.

Overall, the new measures have had minimal impact on the direction of the UKCSI. Most of the questions about customers' experiences with organisations are unchanged. However, as the new questions around customer ethos, emotional connection and ethics tend to attract slightly lower scores than many of the experience-based measures, their inclusion means the UKCSI is marginally lower than it would have been without them. What the new measures bring – and we will explore in this report – is a richer, more nuanced understanding of current customer needs and priorities and how they are rated across different sectors and organisations.

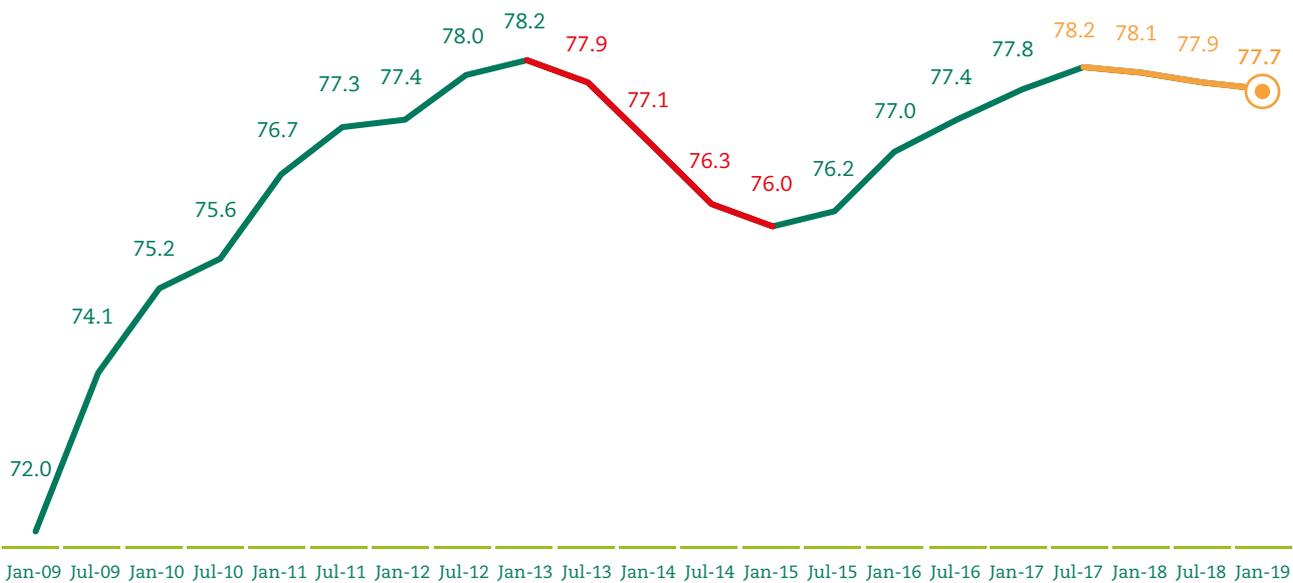
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Customer satisfaction in the UK

Customer satisfaction is at its lowest point since July 2016

There has been another slight fall in the average level of customer satisfaction

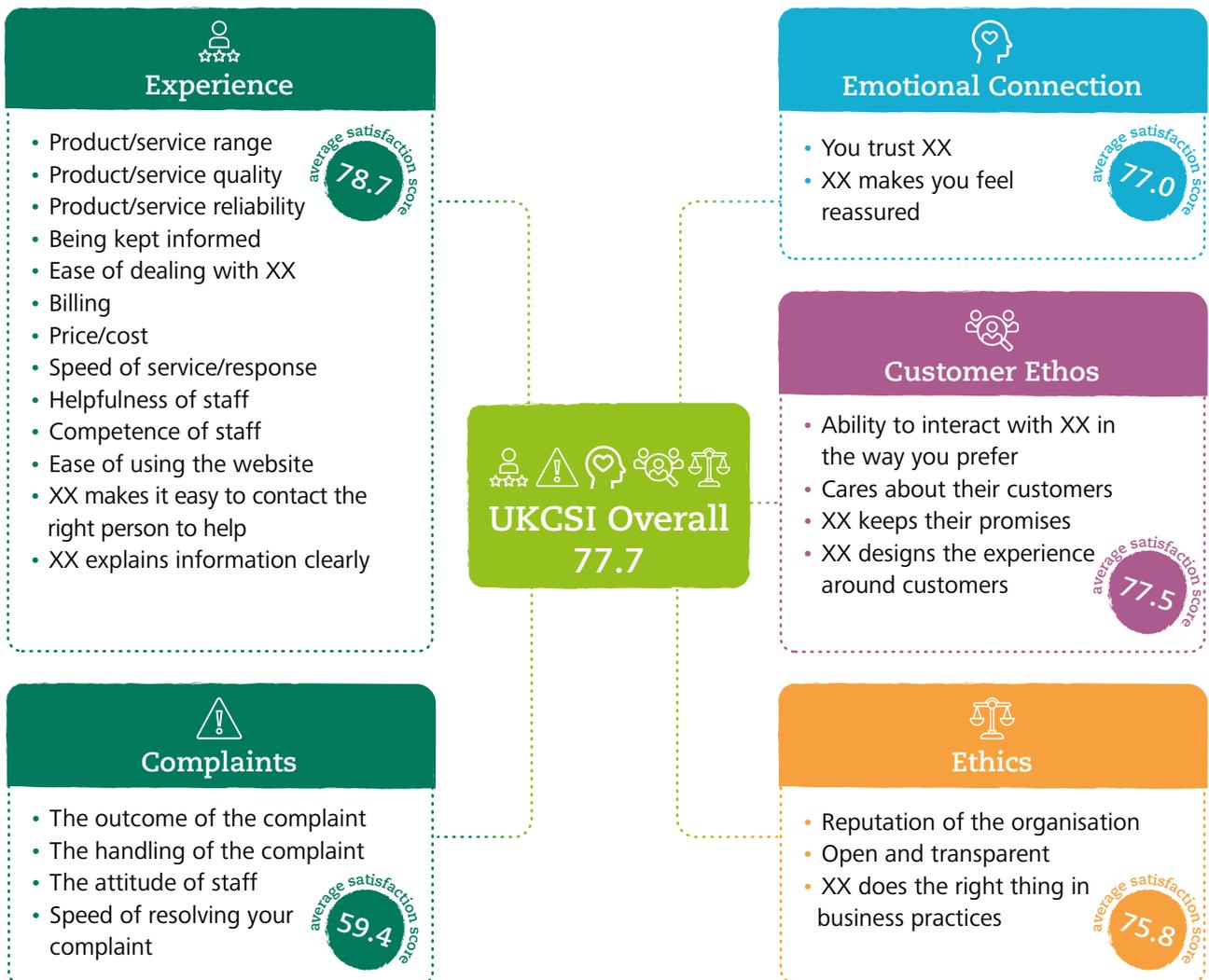
The UKCSI is 77.7 (out of 100), 0.4 points lower than a year ago and 0.2 points below July 2018. Though the decline in customer satisfaction is modest, it is the third consecutive drop. Customer satisfaction is at its lowest point since July 2016.



The overall customer satisfaction measured by the UKCSI is based on five dimensions: experiences with organisations; and perceptions about an organisation’s customer ethos, ethics and emotional connection.



UKCSI Scorecard



On average, customers give higher scores for experience-focused measures than for those relating to emotional connection, customer ethos and ethics

The relatively low average score for complaint handling underlines its perennial importance for customer satisfaction. Only complaints that receive excellent satisfaction scores (a 9 or 10 out of 10) are likely to boost overall customer satisfaction. Most customer problems that become complaints, even those handled better than average, are likely to impair customer satisfaction. This suggests that one of the most significant actions organisations can undertake to improve satisfaction is to understand the root cause of problems for customers and prevent them from occurring.

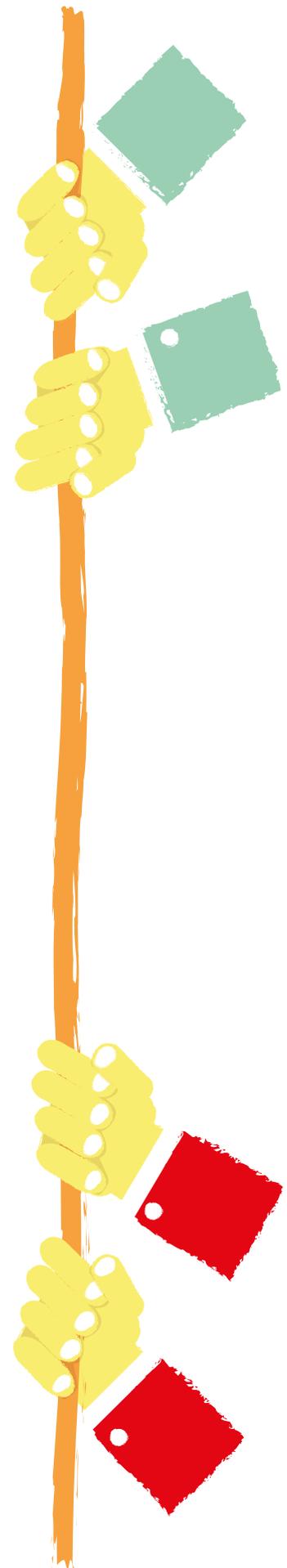


A three year perspective on customer satisfaction

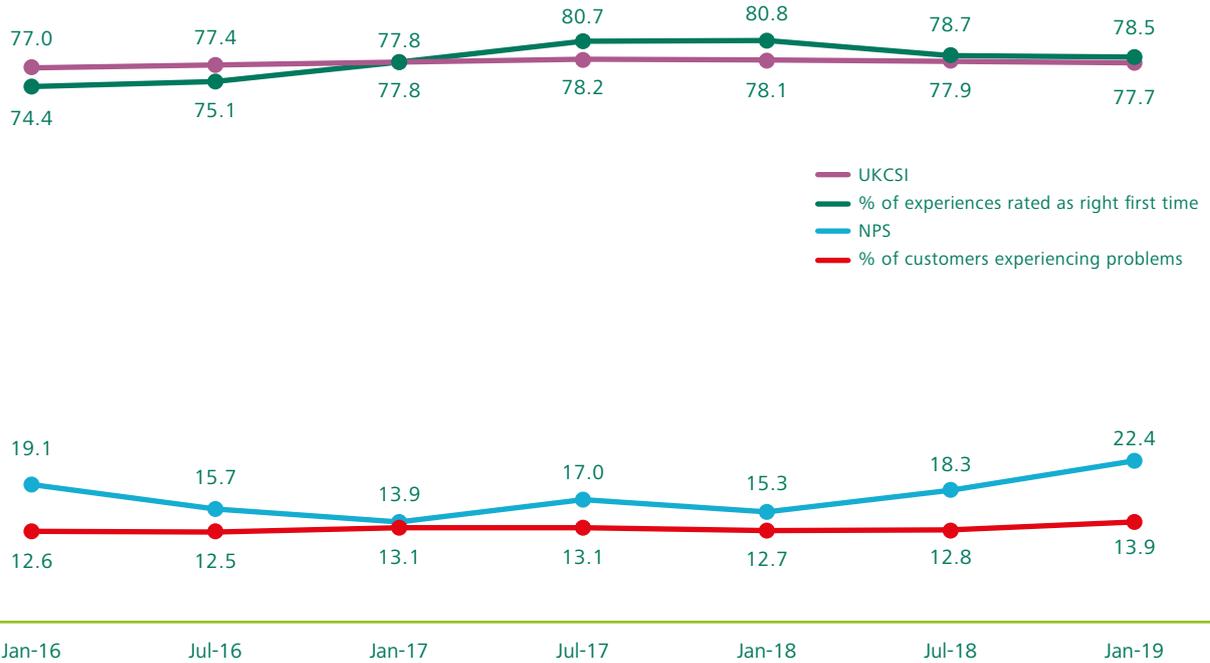
Looking over the last three years, many key measures such as perceptions of employee helpfulness and competence, and trust in organisations, have been, on average, relatively stable. However, customers are having to invest more effort in dealing with organisations and are experiencing more problems.

The level of effort expended by customers in dealing with organisations is at its highest ever, 5.0 (out of 10). Although this measure has been broadly flat over the last two years, it is 0.5 points higher than in January 2016. Customers' trust in the organisation they dealt with is stable. It has remained at 7.7 in six consecutive UKCSI reports dating back to July 2016.

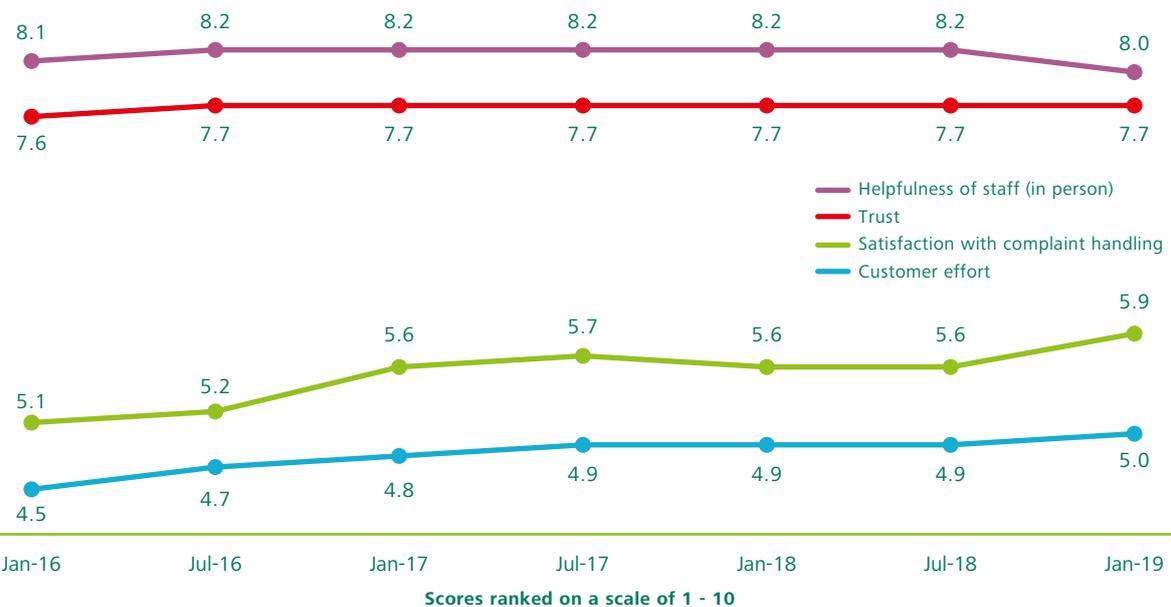
The proportion of customers experiencing a problem, 13.9%, is up by 1.2 percentage points compared to January 2018 and is at its highest ever level. The proportion of experiences rated as right first time has fallen, by 2.3 percentage points, to 78.5%. However, satisfaction with complaint handling, 5.9, is at its highest ever.



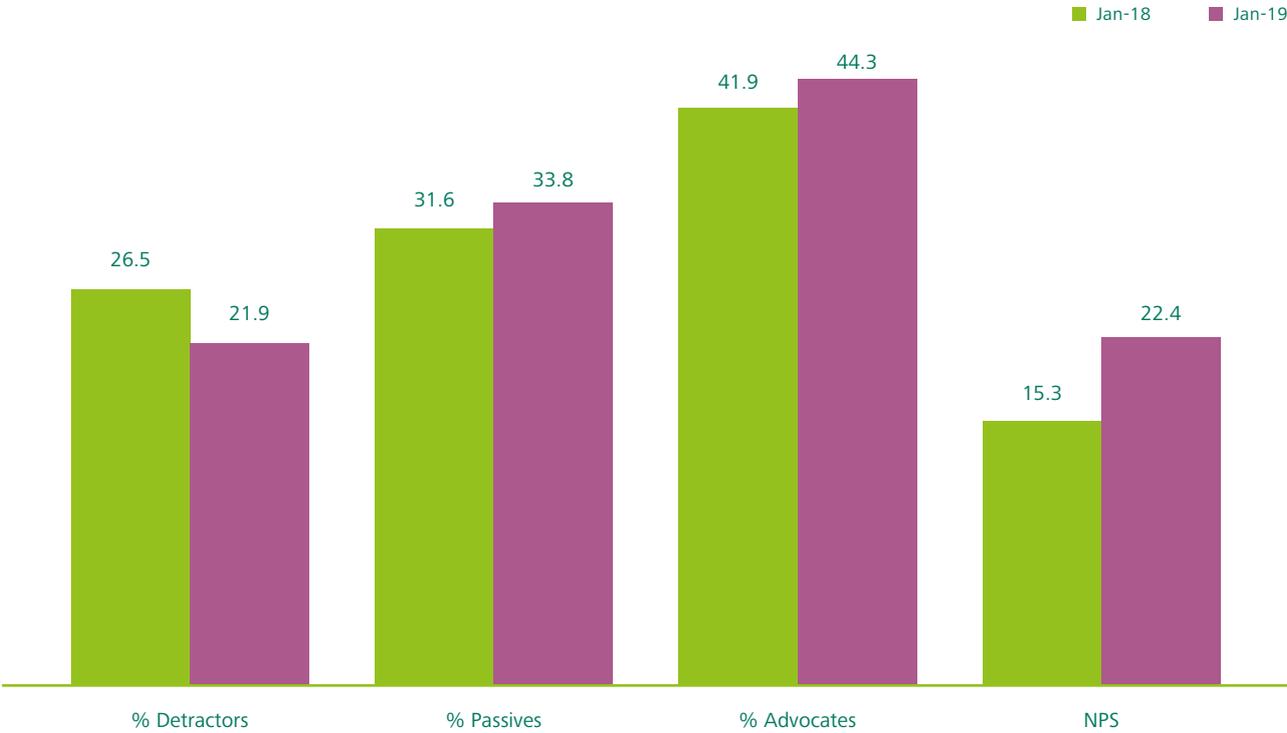
UKCSI, Net Promoter Score, right first time and problems 2016 - 2019



Selected customer satisfaction measures: 2016 - 2019



Despite the overall drop in customer satisfaction the Net Promoter Score⁴ has increased



⁴ Net Promoter Score (NPS) is based on customers' responses to "how likely would you be to recommend xx to friends or relatives." NPS is calculated by subtracting the % of detractors - respondents scoring 0 – 6 (out of 10) - from the % of advocates, who scored 9 – 10. Passives give a score of 7 or 8.

The average Net Promoter Score has increased by 7.1 points and is at its highest ever level, 22.4. This improvement is likely to have been influenced by an increase in the number of organisations (from 28 in July 2018 to 38 in this UKCSI) whose customer satisfaction is at least 2 points better than the previous year's UKCSI score.

However, in most sectors the growth in the average Net Promoter Score appears to be influenced more strongly by a drop in the number of detractors rather than an increase in the proportion of advocates. For example, the Insurance sector saw the biggest year on year increase in its average Net Promoter Score, by 12.1 points, but the number of advocates was almost identical to the same time last year. This evidence suggests that the Net Promoter Score alone is not necessarily a decisive indicator of customer loyalty and customer engagement. The UKCSI therefore draws on a wider range of experience and relationship measures to provide insight about the factors influencing customers' attitudes and behaviour.

Only three sectors – Insurance, Services and Transport – have moved by more than one point compared to last year

Sector	UKCSI score January-19	Change from January-18 to January 2019	Change from July-18 to January 2019	Highest scoring organisations in sector	Highest organisation's score
Retail (Non-food)	81.6	-0.4 ▼	-0.5 ▼	John Lewis	86.5
Retail (Food)	80.6	-0.7 ▼	-0.6 ▼	Iceland	83.2
Banks & Building Societies	80.4	0.6 ▲	0.0 =	first direct	86.7
Leisure	80.3	0.3 ▲	0.4 ▲	Netflix	85.1
Tourism	80.3	-0.4 ▼	0.0 =	Jet2holidays.com	82.5
Insurance	79.8	1.1 ▲	0.5 ▲	Nationwide Insurance	84.0
Automotive	78.9	-0.6 ▼	-0.1 ▼	Suzuki	83.0
Services	76.9	-1.8 ▼	-0.9 ▼	Green Flag	82.5
Public Services (National)	76.1	0.0 =	0.3 ▲	DVLA	79.3
Public Services (Local)	75.7	0.7 ▲	0.3 ▲	Library	84.0
Telecommunications & Media	74.4	0.2 ▲	0.1 ▲	Tesco Mobile	82.4
Utilities	73.8	-0.6 ▼	-0.9 ▼	OVO Energy	79.9
Transport	71.8	-1.9 ▼	-0.7 ▼	Brittany Ferries	81.4

▲ Increase in UKCSI score of less than one point

▼ Fall in UKCSI score

▲ Increase in UKCSI score of one point or more

With a UKCSI score of 79.8, the Insurance sector has improved by 1.1 points compared to the same time last year. It is the only sector in which customer satisfaction has risen by at least one point. Some of the biggest areas of improvement have been for complaint handling and the number of experiences rated as right first time.

Four sectors – Banks and Building Societies, Leisure, Public Services (Local) and Telecommunications and Media – have improved slightly, by less than one point.

The Public Services (National) sector's UKCSI of 76.1 is the same as in January 2018 and 0.3 points higher than in July 2018.

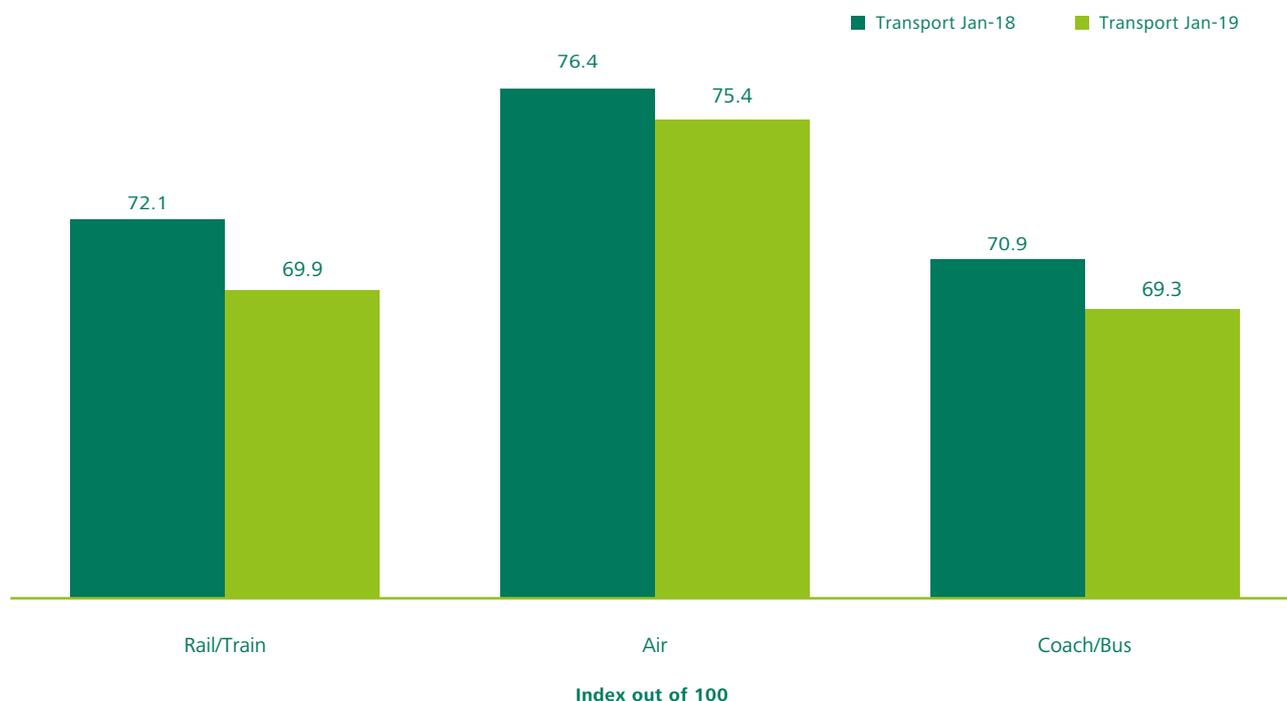
Five sectors – Automotive, Retail (Food), Retail (Non-food), Tourism and Utilities - show a slight decline in satisfaction, of less than one point, compared to the same time last year.

Two sectors - Services and Transport - have fallen by more than one point.

Customer satisfaction in the Services sector has dropped by 1.8 points to 76.9. Until 2015, the Services sector always scored at least one point higher than the UK all-sector average – often considerably higher - but in the last two surveys it has dropped below the UK average.

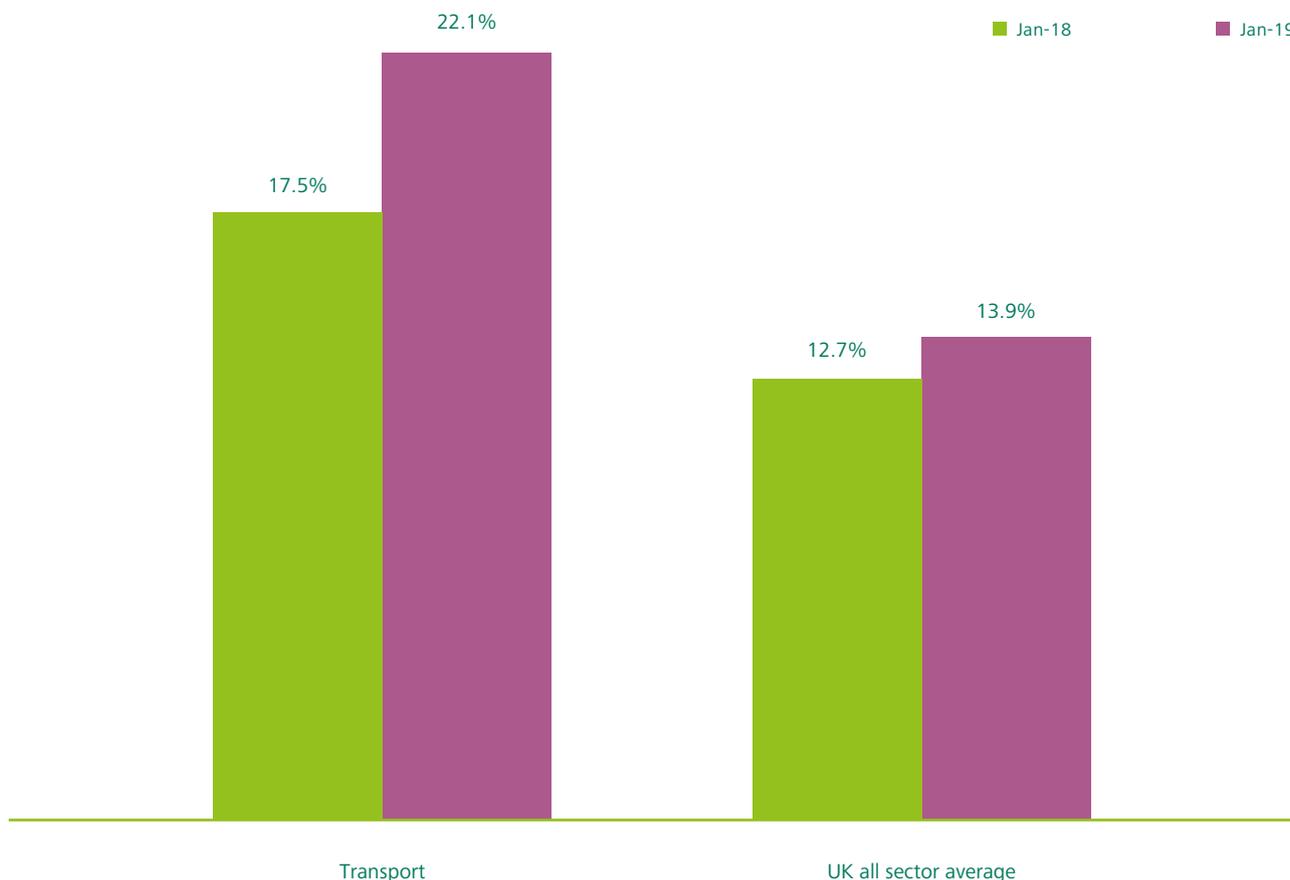
The declining trend in Transport has continued. Its UKCSI score of 71.8 is 1.9 points lower than a year ago. Customer satisfaction in the Transport sector is at its lowest since July 2009. The gap between the UKCSI average and the Transport sector, 5.9 points, is greater than it has ever been. Average satisfaction fell across each of the rail, air and coach / bus modes of transport. Rail companies suffered the largest average decline, of 2.2 points.

Year on year customer satisfaction change by mode of Transport



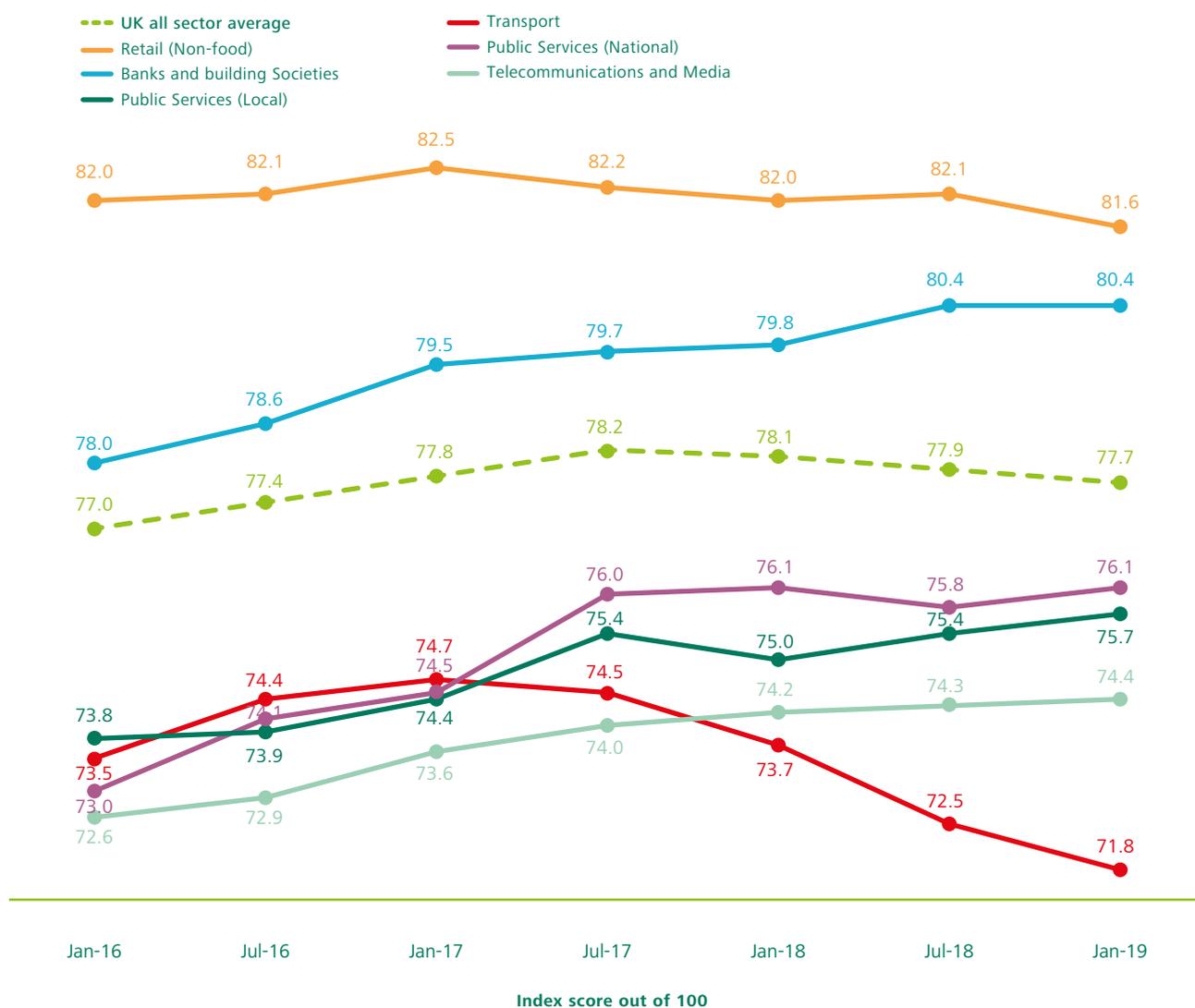
The biggest contributors to the fall in customer satisfaction in the Transport sector were a steep fall in the number of experiences rated as right first time and an unprecedented number of complaints. 22.1% of Transport customers experienced a problem with an organisation, the highest rate ever recorded in the UKCSI for any sector. 14.3% customers made a complaint, again the highest ever recorded in any sector despite the fact that only 64.7% of Transport customers who experienced a problem went on to make a complaint.

% of customers experiencing a problem: Transport and the all-sector average



Sector trends: a three year perspective

Three year sector trends in customer satisfaction



Whereas the overall UKCSI has been relatively flat over the last three years, some sectors show appreciable movements in customer satisfaction. Banks and Building Societies, Public Services (both Local and National) and Telecommunications and Media have seen the biggest positive movement in customer satisfaction. In contrast, customer satisfaction in the Transport sector has fallen, especially since January 2017.

The UKCSI scorecard, by sector

Looking across five dimensions of customer satisfaction, each sector broadly reflects the overall UK pattern, in which experience measures are rated higher than customer ethos, emotional connection and ethics. Complaint Handling unsurprisingly attracts the lowest scores.

Dimensions of customer satisfaction

	 UKCSI	 Experience	 Complaints	 Customer Ethos	 Emotional Connection	 Ethics
UK all-sector average	77.7	78.7	59.4	77.5	77.0	75.8
Retail (Non-food)	81.6	82.7	64.1	81.1	80.8	79.3
Retail (Food)	80.6	81.5	69.8	80.4	79.9	79.0
Banks & Building Societies	80.4	81.5	61.9	80.0	79.5	78.0
Leisure	80.3	81.2	66.6	80.0	79.5	78.4
Tourism	80.3	81.1	65.9	80.7	80.2	78.7
Insurance	79.8	80.5	63.2	79.7	79.3	78.4
Automotive	78.9	79.8	65.7	79.8	79.7	78.0
Services	76.9	77.7	54.9	76.7	76.4	74.7
Public Services (National)	76.1	76.8	55.7	75.7	76.2	74.2
Public Services (Local)	75.7	76.1	52.0	75.4	75.8	74.8
Telecommunications & Media	74.4	75.5	56.0	73.9	72.4	71.9
Utilities	73.8	75.1	57.2	73.1	71.4	70.9
Transport	71.8	73.2	52.9	71.0	69.6	68.7

However, there is some variation in the relative performance of sectors to the UK average on the dimensions of customer satisfaction. Certain sectors are rated relatively higher or lower for complaint handling, customer ethos, emotional connection or ethics than their overall UKCSI score would suggest.

	Sector scores higher in this dimension than the UKCSI average score would suggest	Sector scores lower in this dimension than the UKCSI average score would suggest
 Complaints	<ul style="list-style-type: none"> • Automotive • Insurance • Leisure • Retail (Food) • Tourism • Utilities 	<ul style="list-style-type: none"> • Public Services (Local) • Public Services (National) • Services
 Customer Ethos	<ul style="list-style-type: none"> • Automotive 	
 Emotional Connection	<ul style="list-style-type: none"> • Automotive 	<ul style="list-style-type: none"> • Telecommunications & Media • Transport
 Ethics		<ul style="list-style-type: none"> • Transport

Sector variations in Net Promoter Score

There has been a bigger than average reduction in both the number of detractors and growth in advocates in the Automotive, Banks and Building Societies, Insurance and Leisure and Tourism sectors. Transport is the only sector where there has been no growth in the number of advocates, alongside a small increase in the number of detractors.

Sector	Net Promoter Score	NPS Change	Change in % detractors	Change in % passives	Change in % advocates
UK average	22.4	7.1	-4.6 ▼	2.2	2.5 ▲
Retail (Non-food)	43.9	7.5	-5.4 ▼	3.2	2.2 ▲
Retail (Food)	37.9	6.3	-5.5 ▼	4.7	0.8
Tourism	36.3	9.1	-5.4 ▼	1.7	3.7 ▲
Leisure	34.7	9.5	-5.8 ▼	2.0	3.8 ▲
Automotive	27.1	10.0	-5.2 ▼	0.5	4.8 ▲
Banks & Building Societies	26.9	11.8	-7.1 ▼	2.4	4.7 ▲
Public Services (National)	23.0	7.1	-4.9 ▼	2.7	2.2 ▲
Services	21.0	4.1	-4.0 ▼	3.9	0.1
Insurance	19.2	12.1	-6.6 ▼	1.1	5.5 ▲
Public Services (Local)	18.2	6.5	-4.5 ▼	2.5	2.0 ▲
Telecommunications & Media	5.2	6.8	-4.4 ▼	2.1	2.3 ▲
Transport	1.4	-2.1	0.4 ▲	1.4	-1.7 ▼
Utilities	-4.2	3.8	-2.0 ▼	0.2	1.8 ▲

■ Increase in detractors or reduction in advocates of at least one point

■ Increase in advocates or reduction in detractors by at least one point

Customer satisfaction by organisation

259

Organisations and organisation types in the UKCSI

38↑

Organisations have improved their yoy score by at least two points

53↓

Organisations have dropped yoy by at least two points

Number of organisations receiving a UKCSI score in each sector

Automotive	24	Retail (Non-food)	25
Banks & Building Societies	15	Services	21
Insurance	25	Telecommunications & Media	14
Leisure	24	Tourism	19
Public Services (Local)	7	Transport	34
Public Services (National)	9	Utilities	31
Retail (Food)	11		

In the January 2019 UKCSI eight organisations have appeared for the first time

Home Bargains	Retail (Non-food)
Highways England	Public Services (National)
Sky Mobile	Telecommunications & Media
Gatwick Express	Transport
Heathrow Express	Transport
London North Eastern Railway	Transport
UK Power Networks	Utilities
Wales & West Utilities	Utilities

The top 50 organisations

Jan-19 Rank	Organisation	Sector	Jan-19 Score	Jan-18 Score	Jan-18 Rank	Change in score Jan -18 to Jan -19
1	first direct	Banks & Building Societies	86.7	86.1	2	0.6
2	John Lewis	Retail (Non-food)	86.5	85.0	5	1.5
3	M & S (Bank)	Banks & Building Societies	86.3	84.7	7	1.6
4	Next	Retail (Non-food)	85.8	83.9	13	1.9
5 =	Amazon.co.uk	Retail (Non-food)	85.4	86.6	1	-1.2
5 =	Nationwide	Banks & Building Societies	85.4	84.7	7	0.7
7	Netflix	Leisure	85.1	82.8	24	2.3
8	Argos	Retail (Non-food)	84.1	81.4	46	2.7
9	Nationwide Insurance	Insurance	84.0	83.6	19	0.4
10	LV=	Insurance	83.9	81.7	42	2.2
11	Home Bargains	Retail (Non-food)	83.5	NO DATA	NO DATA	NO DATA
12 =	Iceland	Retail (Food)	83.2	82.1	36	1.1
12 =	Specsavers	Retail (Non-food)	83.2	82.4	31	0.8
12 =	Zurich	Insurance	83.2	75.2	188	8.0
15	Suzuki	Automotive	83.0	81.5	44	1.5
16 =	Aviva	Insurance	82.8	80.8	58	2.0
16 =	Honda	Automotive	82.8	82.2	33	0.6
16 =	Kia	Automotive	82.8	78.8	111	4.0
19	Boots UK	Retail (Non-food)	82.6	79.3	99	3.3
20 =	Green Flag	Services	82.5	80.8	58	1.7
20 =	Jet2holidays.com	Tourism	82.5	84.2	9	-1.7
20 =	Wilko	Retail (Non-food)	82.5	85.0	5	-2.5
23 =	Holland & Barrett	Retail (Non-food)	82.4	80.8	58	1.6
23 =	Premier Inn	Tourism	82.4	83.8	16	-1.4
23 =	Tesco Mobile	Telecommunications & Media	82.4	84.2	9	-1.8
26 =	Aldi	Retail (Food)	82.3	83.9	13	-1.6

▲ Increase in UKCSI score of less than one point

▼ Fall in UKCSI score

▲ Increase in UKCSI score of one point or more

Jan-19 Rank	Organisation	Sector	Jan-19 Score	Jan-18 Score	Jan-18 Rank	Change in score Jan -18 to Jan -19
26 =	Debenhams	Retail (Non-food)	82.3	81.3	49	1.0
28	Greggs	Leisure	82.2	84.0	12	-1.8
29 =	Ocado	Retail (Food)	82.0	80.2	72	1.8
29 =	SAGA Insurance	Insurance	82.0	82.7	25	-0.7
29 =	Waitrose	Retail (Food)	82.0	84.2	9	-2.2
32 =	M & S	Retail (Non-food)	81.9	82.2	33	-0.3
32 =	Trivago	Tourism	81.9	80.8	58	1.1
34	Subway	Leisure	81.8	82.7	25	-0.9
35 =	Co-op Food	Retail (Food)	81.7	77.9	140	3.8
35 =	JD Wetherspoon	Leisure	81.7	79.4	96	2.3
37	BMW	Automotive	81.6	80.8	58	0.8
38 =	Pets at Home	Retail (Non-food)	81.5	83.9	13	-2.4
38 =	Toby Carvery	Leisure	81.5	79.1	104	2.4
40 =	booking.com	Tourism	81.4	82.1	36	-0.7
40 =	Brittany Ferries	Transport	81.4	83.4	21	-2.0
40 =	Santander	Banks & Building Societies	81.4	81.0	53	0.4
43 =	Esure	Insurance	81.3	79.7	88	1.6
43 =	Tesco	Banks & Building Societies	81.3	78.6	117	2.7
45 =	Halifax	Banks & Building Societies	81.2	79.6	91	1.6
45 =	Jet2	Transport	81.2	82.6	29	-1.4
45 =	Škoda UK	Automotive	81.2	82.7	25	-1.5
45 =	Spotify	Leisure	81.2	79.8	86	1.4
49	Costa Coffee	Leisure	81.1	79.6	91	1.5
50 =	Lidl	Retail (Food)	80.9	81.9	41	-1.0
50 =	Primark	Retail (Non-food)	80.9	79.7	88	1.2

▲ Increase in UKCSI score of less than one point

▼ Fall in UKCSI score

▲ Increase in UKCSI score of one point or more

20 of the top 50 organisations were not amongst the top 50 in January 2018.

11 of the top 50 organisations have improved by more than 2 points. The biggest gains were for Zurich (up 8 points), Kia (up 4 points) and Co-op Food and Boots UK, who both improved by more than 3 points.

Dimensions of customer satisfaction, by organisation

UKCSI dimensions

Rank	 Experience	 Complaints	 Customer Ethos	 Emotional Connection	 Ethics
1	amazon.co.uk	Trivago	John Lewis	M & S (Bank)	John Lewis
2	first direct	BMW	first direct	first direct	M & S (Bank)
3	John Lewis	Lidl	M & S (Bank)	John Lewis	first direct
4	M & S (Bank)	Netflix	Next	Nationwide	Nationwide
5	Next	Disclosure & Barring Service	Nationwide	Next	Zurich
6	Nationwide	Northern Ireland Water	Nationwide (Insurance)	Netflix	Next
7	Netflix	UK Power Networks	amazon.co.uk	Zurich	Netflix
8	Nationwide (Insurance)	Hilton	Netflix	Nationwide (Insurance)	Nationwide (Insurance)
9	Argos	South East Water	Kia	Kia	Waitrose
10	Home Bargains	McDonalds	Ocado	Suzuki	Holland & Barrett

In general, there is a high level of overlap between the top 50 UKCSI organisations and those in the top 50 for the Experience dimension. However, 21 of the top 50 UKCSI organisations do not appear in the top 50 for at least one of the Customer Ethos, Emotional Connection and Ethics dimensions. This suggests that, for many organisations, there are opportunities to achieve further improvements in satisfaction and loyalty by influencing customer perceptions of trust, reassurance, transparency, doing the right thing in business practice and designing experiences around the needs of customers.



The Complaint Handling dimension is unique because scores are only quoted for organisations for whom at least 10 complaints were recorded. This means that fewer organisations receive a score. Many organisations generating particularly low levels of customer problems and complaints may not receive published satisfaction with complaint handling ratings. As a result, there is a wider diversity of organisations receiving the strongest ratings for complaint handling compared to the other UKCSI dimensions.

Ratings for individual organisations across the full range of UKCSI measures and scorecard dimensions are available in the series of 13 sector reports published by The Institute alongside this UKCSI report⁴.

⁴ Sector reports are available as a membership benefit for Institute organisational members; entitlement to sector reports varies by membership level. Sector reports are available for purchase by non members at www.instituteofcustomerservice.com/research

Most improved organisations

20 most improved organisations over one year	UKCSI score January 2019	UKCSI score January 2018	Change	Sector
Zurich	83.2	75.2	8.0	Insurance
Sports Direct	73.7	69.0	4.7	Retail (Non-food)
Burger King	77.8	73.3	4.5	Leisure
Jobcentre Plus	60.8	56.4	4.4	Public Services (National)
Homeserve	77.1	72.9	4.2	Services
Allianz	79.8	75.7	4.1	Insurance
Kia	82.8	78.8	4.0	Automotive
Vodafone	75.3	71.4	3.9	Telecommunications & Media
Co-op Food	81.7	77.9	3.8	Retail (Food)
Privilege	79.8	76.3	3.5	Insurance
The Co-operative Bank	80.7	77.3	3.4	Banks & Building Societies
Boots UK	82.6	79.3	3.3	Retail (Non-food)
Fiat	77.1	73.9	3.2	Automotive
Argos	84.1	81.4	2.7	Retail (Non-food)
Tesco	81.3	78.6	2.7	Banks & Building Societies
Dwr Cymru (Welsh Water)	79.0	76.4	2.6	Utilities
Kwik Fit	79.6	77.1	2.5	Services
Virgin Mobile	74.7	72.2	2.5	Telecommunications & Media
British Airways	77.1	74.7	2.4	Transport
Flybe	77.4	75.0	2.4	Transport
Odeon	79.4	77.0	2.4	Leisure
Timpson	78.4	76.0	2.4	Services
TNT	76.5	74.1	2.4	Services
Toby Carvery	81.5	79.1	2.4	Leisure
Vue Cinema	79.1	76.7	2.4	Leisure

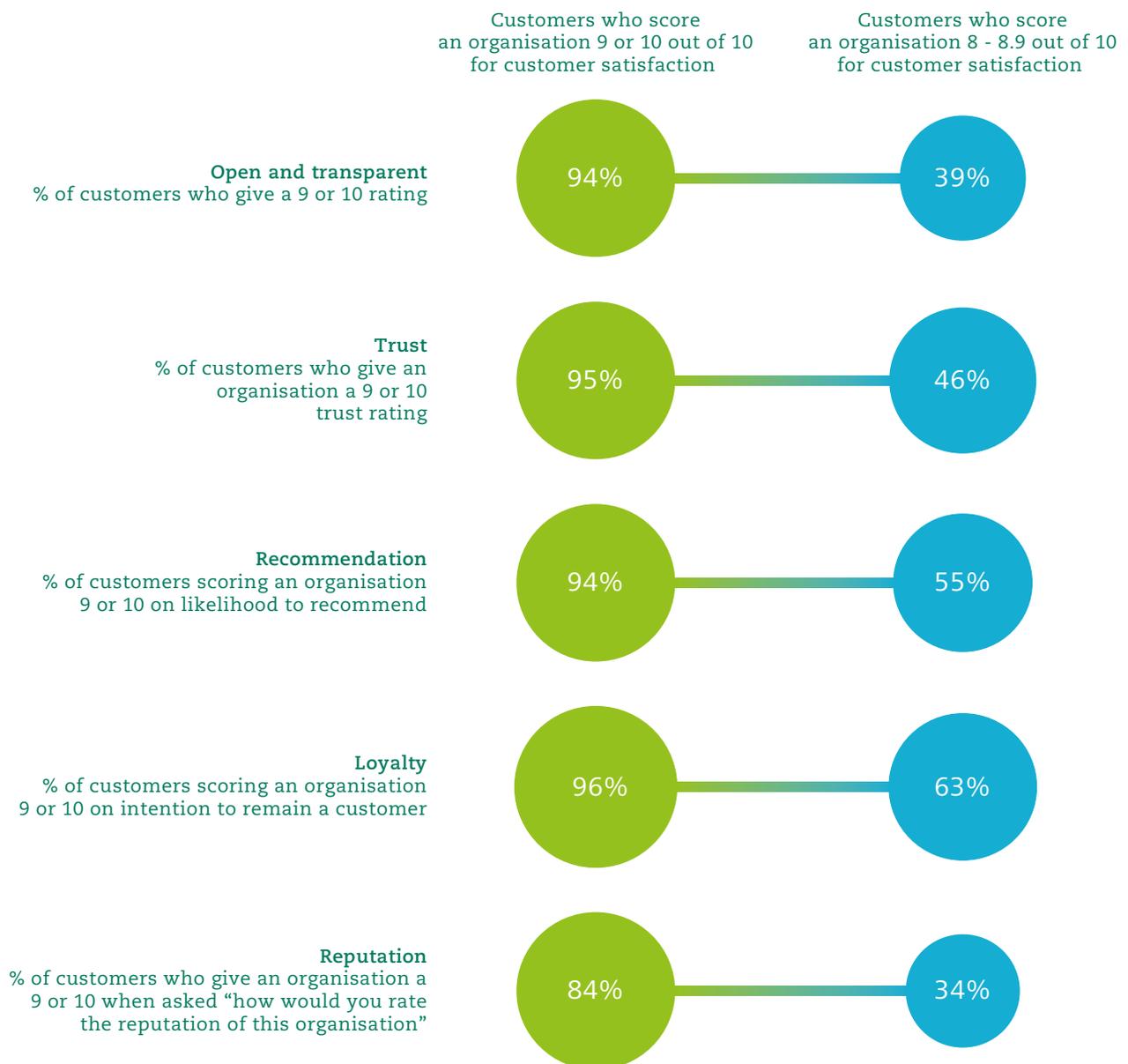
Zurich is the most improved organisation for customer satisfaction compared to January 2018. Zurich has improved across a range of measures including product / service quality, price / cost, billing and ease of dealing with the organisation. Zurich's overall increase in satisfaction has also been boosted by comparatively high scores for the new emotional connection and ethics measures.

Eight of the most improved organisations have recorded their highest ever UKCSI score: Zurich; Privilege; Virgin Mobile; Co-op Food; Argos; Kwik Fit; Vue Cinema; and Dwr Cymru.

Despite the overall fall in customer satisfaction in the Services sector, four Services organisations are amongst the most improved in the UKCSI.

Achieving a 9 or 10 out of 10 for customer satisfaction gives a significant boost to trust, reputation, loyalty and recommendation

Organisations that score a 9 or 10 out of 10 for customer satisfaction are much more likely even than those achieving 8 out of 10 to earn the strongest levels of trust, reputation, loyalty and recommendation. This reinforces the crucial relationship between consistently high levels of customer satisfaction and sustainable business performance.



Key attributes and differentiators of high performing organisations

The range of UKCSI scorecard measures provides enhanced evidence of the range of attributes that differentiate the highest performing organisations. These attributes reinforce the importance of excellence in transactional and functional experiences and a consistent focus on building a genuine service culture.



3

Customer
satisfaction
and business
performance

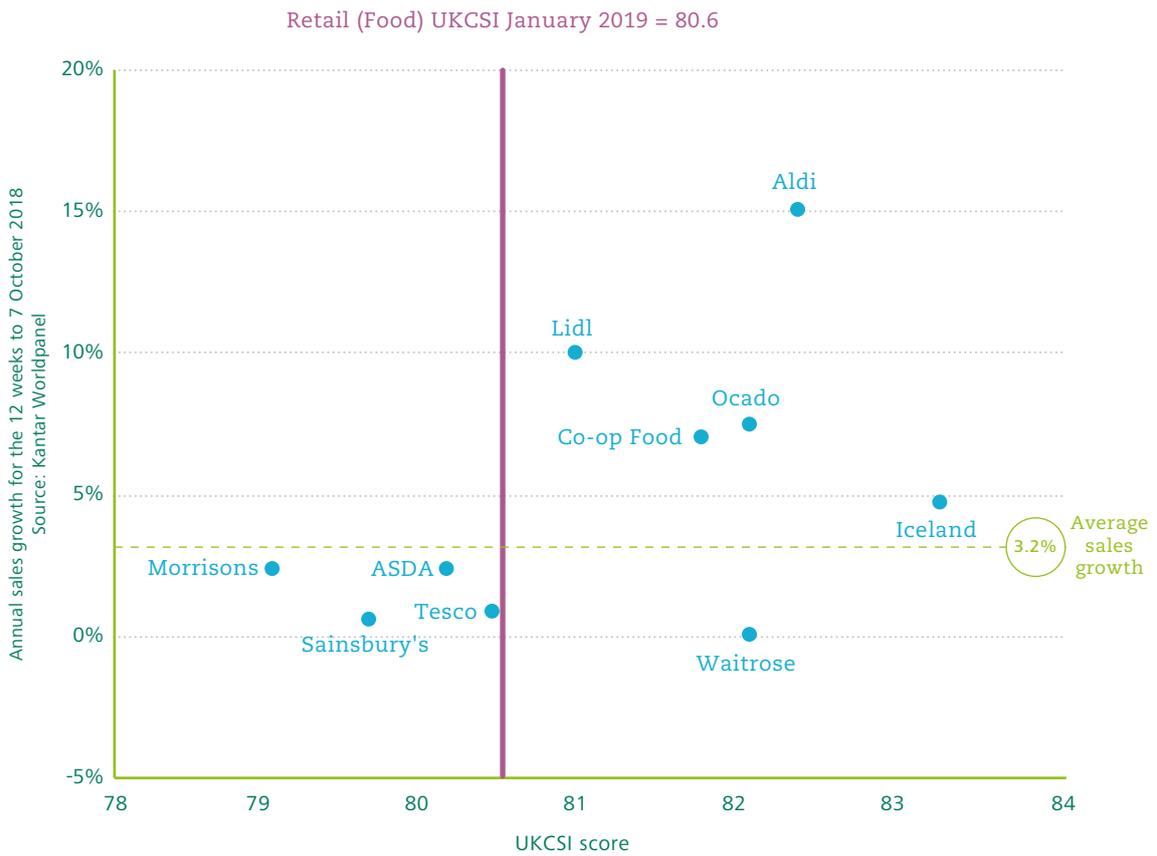
The link between customer satisfaction and sales growth in Retail (Food)

Kantar's study of the Retail (Food) sector shows overall sales growth of more than 3.0% for the fourth period in a row and ahead of the average market growth rate over the past five years, 1.7%. In this highly competitive and congested sector, with only 4.2 UKCSI points separating the highest and lowest rated organisations for customer satisfaction, relatively small differences in customer satisfaction can have significant commercial impact.

Companies whose customer satisfaction was at least one point higher than the sector average earned an average sales growth of 6.9%, compared to 1.5% for those with lower than average satisfaction and 4.4% for companies with customer satisfaction within one point (higher or lower) than the Retail (Food) average.



Customer satisfaction and sales growth: the Retail (Food) sector

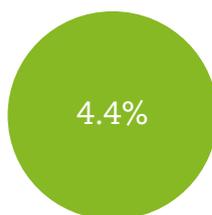


Sales Growth

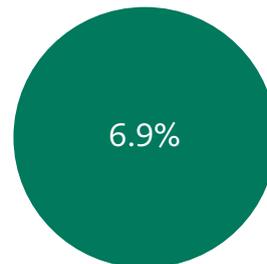
Food retailers with UKCSI at least 1 point below sector average



Food retailers with UKCSI within +/- 1 point of sector average



Food retailers with UKCSI at least 1 point above sector average



Iceland is the highest rated organisation for customer satisfaction in the sector and Co-op Food the most improved. Co-op Food and Ocado are the only companies whose customer satisfaction has increased by more than one point compared to January 2018.

Perhaps the most striking feature of this UKCSI is the emergence of Co-op Food. Its UKCSI score of 81.7 is 3.8 points higher than a year ago and is its highest ever score. Its sales grew by 7% resulting in a small market share increase, of 0.2%. Co-op Food saw improved ratings on most customer satisfaction measures, especially ease of dealing with the organisation, helpfulness and competence of employees. Co-op Food also received relatively strong ratings for the new UKCSI customer ethos and ethics dimensions. Kantar reported that Co-op Food's own label lines were particularly prominent, accounting for more than half of its total sales.

Iceland has maintained its position as the highest rated food retailer in the UKCSI. It held its market share and saw sales growth of 4.8%.

Sainsbury's, Tesco and Asda all achieved sales growth but suffered losses in market share. M & S and Waitrose saw a drop in their customer satisfaction scores compared to 2018, of 3 points and 2.2 respectively. These two organisations have relatively high ratings for measures relating to customer ethos and ethics. However, for both companies, the year on year fall in customer satisfaction can be partly attributed to lower rates of right first time, a higher incidence of problems and lower satisfaction with complaint handling. This underlines the importance of consistent performance across all the dimensions of customer interactions and relationships measured by the UKCSI.

Banks & Building Societies: higher customer satisfaction and current account gains

Customer satisfaction in the Banks & Building Societies sector is 80.4, 0.6 points higher than a year ago and the same level as in July 2018. This is the highest UKCSI the sector has ever registered; it is now, on average, the highest rated sector after the two Retail sectors (Non food) and (Food).

A comparison of banks' performance for net current accounts gains and losses in the most recent Current Account Switching Service Dashboard and the preceding UKCSI (in this case July 2018) shows that on average, banks with higher than the sector average customer satisfaction have recorded a greater number of net current account gains than those with lower customer satisfaction.

Nationwide, consistently one of the UKCSI's strongest performers for customer satisfaction, recorded the highest volume of current account net gains. However, HSBC, the second most successful organisation in terms of current account net gains, has received a UKCSI below the sector average since January 2014. HSBC experienced high volumes of both current account gains and losses in the reporting period.

The CASS Dashboard's⁵ market commentary suggests that switching incentives are likely to have contributed significantly to the high volume of current account gains. It also notes an increased volume in new current accounts for challenger banks Monzo and Starling. However, these organisations do not yet have sufficient customer volumes to appear in the UKCSI.

Customer satisfaction and current account switching



⁵ Current Account Switching Service Dashboard Issue 20. This analysis only includes organisations that appear in both the UKCSI and the CASS Dashboard.

Banks & Building Societies: Customer Satisfaction and current account switching

Organisations with higher than sector average customer satisfaction



■ Net current account gains

Organisations with lower than sector average customer satisfaction



■ Net current account losses

Customer satisfaction and current account switching: a two year perspective

Over the past two years, banks with better than the sector average customer satisfaction have achieved an average 11,271 net current account gains compared to -5,226 net losses for those with below average customer satisfaction.

This suggests that over a longer period, organisations' performance and reputation for customer service, as well as switching incentives, influence customers' decision to change their bank.

Customer satisfaction and average current account quarterly net gains / losses: Q1 2017 - Q2 2018



Customer satisfaction and average current account quarterly net gains / losses: Q1 2017 - Q2 2018

Organisations with higher than sector average customer satisfaction



■ Net current account gains

Organisations with lower than sector average customer satisfaction



■ Net current account losses

4

Conclusion and recommendations

This UKCSI reaffirms the priorities that are most important to customers in their interactions and relationship with organisations. These priorities include product / service reliability and quality, a fair price, employee competence, attitude and helpfulness.

In many scenarios, customers want to achieve their objective in dealing with an organisation as quickly and effectively as possible and be able to call on expert advice when they need it. The importance of consistently getting things right first time and continuously identifying ways of reducing customer effort cannot be overstated. These customer priorities are essentially functional. Organisations can gather the insight to understand their customers' priorities and implement tangible actions to improve customer satisfaction.

Our new research highlights a broader range of emotional and attitudinal attributes that influence relationships and satisfaction with organisations. They include feeling reassured; expectations consistently being met; promises being kept; an organisation's ethics; the sense that it designs experiences around the needs of its customers. These feelings and attitudes are reflected in perceptions of an organisation's reputation and trustworthiness.

In the UKCSI scorecard, we have expressed these dimensions of customer satisfaction as emotional connection, customer ethos and ethics. These attributes are difficult to influence directly and in the short-term. They are the outcome of an organisation's values, the way it conducts relationships with customers, employees, suppliers and partners and the wider society, and the extent to which it focuses on developing a genuinely service-orientated culture.

We recommend a number of tangible ways through which organisations can build and demonstrate emotional connection, customer ethos and ethical standards.



1 Leadership commitment



2 Employee engagement



3 Proactive engagement and commitment with customers



4 Ethics and impact on society



5 A long term focus on quality of customer experiences and relationships

1) Leadership commitment

Many leaders recite a commitment to high standards of customer service. But does it genuinely resonate with customers and employees?

There are a number of practical actions leaders can take that demonstrate an authentic customer ethos:

- Publish the organisation's customer service strategy, objectives and results
- Publish employee engagement results and show the link to customer satisfaction
- Ensure that there is board-level accountability for customer service performance
- Link executive pay and incentives to customer service performance
- Ensure that all employees have personal objectives linked to their impact on customer service performance
- Select suppliers and partners that share and demonstrate a commitment to the organisation's customer ethos
- Give priority to investing in and developing colleagues



2) Employee engagement

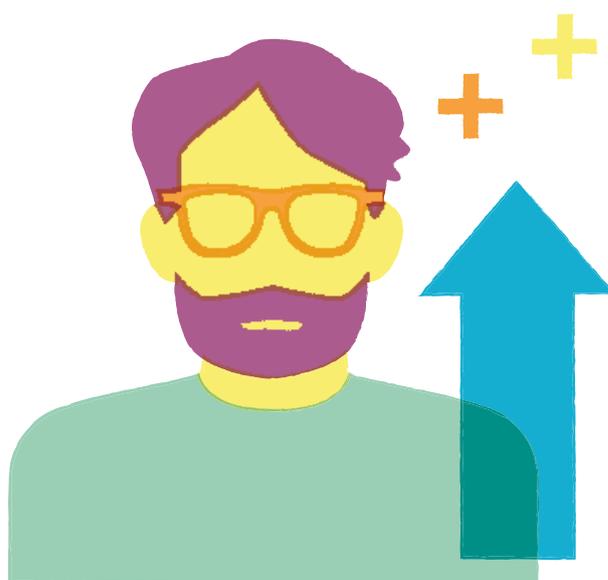
The UKCSI shows that at least two thirds of customer experiences involve direct interactions between customers and employees, whether in person, over the phone, via email or written communication. Customer experiences through Apps, webchat, social media and text are also likely to involve employees either directly or in their design.

As more routine transactions are increasingly handled through technology, employees are likely to spend a higher proportion of their time on complex interactions and issues. There will therefore be a heightened requirement for a broad range of customer management skills and for employee engagement. Employees' discretionary effort, personal connection with customers, consistency of performance, ideas and creativity, collaboration and teamwork are therefore essential assets that influence both customer satisfaction and productivity.

The Institute's research *The Customer Knows*⁶ presented evidence of a compelling link between high levels of customer satisfaction and employee engagement, as well as identifying key actions to build and sustain employee engagement in a service context.

Six essential elements of employee engagement:

- Bring vision and values to life in a way that can be understood by everyone in the organisation
- Equip managers with the skills to engage effectively with employees
- Authentic, regular, relevant communications with employees
- Enable a genuine employee voice
- Ensure every employee has appropriate training and a personal development plan
- Recognise excellent customer service performance



⁶ *The Customer Knows: How customer satisfaction leads to greater customer satisfaction and loyalty*, Institute of Customer Service, 2016. Available at www.instituteofcustomerservice.com/research.

Fairness, employee engagement and productivity

Our recent research, *Productivity UK: generating sustainable value from service*⁷, highlighted the critical importance of fair pay and incentives to both employee engagement and productivity. While pay and benefits are generally not strong drivers of positive employee engagement, unsatisfactory reward can undermine engagement. In a period when many people have experienced flat or negative wage growth, levels of pay may be an unseen barrier to employee engagement. Our research found that employees regard pay and incentives as the most significant barriers to improving productivity in their organisation. The lowest paid employees are especially likely to see pay as barrier to better productivity. Moreover, evidence from the July 2018 UKCSI indicated that 22.2% of customers would definitely stop using an organisation and a further 38.3% would prefer to find a suitable alternative if they discovered an organisation does not pay all its employees a living wage.

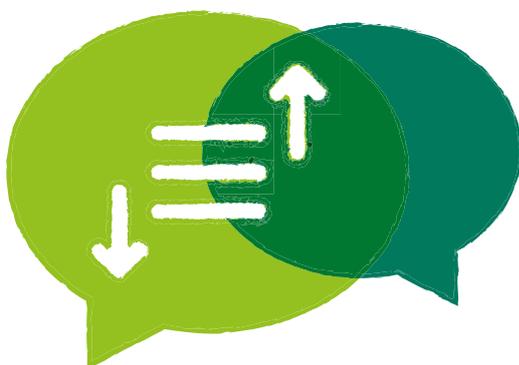
Fair pay is therefore not just an issue of corporate governance but is increasingly relevant to employee engagement, productivity and customer satisfaction.



⁷ *Productivity UK: Generating sustainable value from service*, Institute of Customer Service, 2018. Available at www.instituteofcustomerservice.com/research.

3) Proactive engagement and communication with customers

There is an increased scrutiny of organisations' corporate governance, ethical behaviour as well as of the ways they collect, use and store customers' personal data. Many customers use informal or trusted sources of recommendation to inform their decision about an organisation's reputation and whether to deal with them. Many organisations devote significant resources to building their brand and reputation through a variety of media and in direct communications with organisations. Yet the level of trust in organisations is broadly flat.



There are a number of practical ways organisations can proactively engage and communicate with customers in order to build trust:

- Proactively engage with customers in designing products and services
- Ensure that there is consistency between the tone and content of brand communications and the quality of customer experience
- Be transparent about how customer data is collected, used and stored
- Deploy customer data and insight in a way that genuinely enhances personalisation and relevance
- Develop plans to react quickly in crisis situations to provide customers with relevant information, advice and reassurance
- Provide clear routes for customers to give feedback and be receptive to the feedback received
- Ensure artificial intelligence is deployed to improve customer experiences, not just to drive efficiencies

4) Ethics and impact on society

Perceptions about an organisation's reputation, business practices and ethical behaviour towards customers, employees, suppliers and wider society can be difficult to influence and interpret, especially in the short term. Many aspects of corporate governance are not visible to customers. Some customers are highly motivated by a range of ethical concerns; others are particularly interested in specific issues; others claim to be relatively uninterested by an organisation's ethics. However evidence in this UKCSI shows strong links between customers who give high ratings for ethical behaviour and the highest levels of customer satisfaction.

Many customers expect organisations to do the right thing across their business practices, not wait until they are told to do so by regulators, government or because of public pressure. Our new research into customers' priorities shows that people attach increased importance to openness and transparency in every sector, suggesting that this should be a long-term focus for organisations.



Practical actions that organisations can take to demonstrate ethical behaviour in their business practice:

- Fair pay for all employees, for example ensuring that all employees receive a living wage
- Ensure fair pay and working conditions for employees throughout the organisation's supply chains
- Fair and transparent pricing and contracts for all customers
- Be seen to pay reasonable levels of tax
- Actively recruit and create employment opportunities, especially in communities the organisation serves, or where it has significant operations
- Ensure all employees have appropriate personal development plans that improve their career opportunities
- Support community or education projects that are aligned to the organisation's purpose and values, especially in communities the organisation serves, or where it has significant operations

5) A long term focus on quality of customer experiences and relationships

Perhaps the most obvious way an organisation can build trust and reputation with its customers is through the quality and consistency of the experiences it offers. The aspects of experience measured by the UKCSI are based on priorities identified by customers' especially around product or service quality and reliability, employees' helpfulness and competence, fair price / cost and the ability to interact with an organisation in the way you prefer.

Based on our research into customers' priorities and the evidence from the UKCSI we recommend the following areas of focus:

- Ensure that customer journeys and experiences are based around customers' priorities
- A persistent focus on getting things right first time
- Proactively identify ways to reduce customer effort
- Enable consistency of channels and understanding causes of variation in customer experience across channels
- A heightened focus on the context of "moments of truth" that require high levels of empathy, discretion and judgement, such as complaints, high value purchases, bereavement and significant changes in personal circumstances
- Root cause analysis and proactive action to prevent problems occurring



UKCSI

Key facts

10

Number of years UKCSI has run.
The UKCSI is published twice a year, normally in January and July.

13

Number of sectors the UKCSI covers, 11 in the private sector as well as the local and national public sectors. The Institute also publishes sector reports with a detailed breakdown of scores by sector and organisation.

45,000

Number of unique responses included in January 2019, from over 10,000 customers. Customers are geographically and demographically representative of the UK population and participate in the survey through an online panel. Customers are asked to provide a score for organisations based on their most recent interaction.

3,000

Number of responses per sector, except for Transport and Utilities, which have 6,000 responses each.

259

Number of individual organisations and organisation types which received a UKCSI rating. 247 named organisations which have exceeded a minimum sample size are scored in the 13 sector reports. In addition, scores are given for 12 generic providers including "your local Council", "your local restaurant/takeaway" etc.

Organisations included in the January 2019 UKCSI

Automotive

Audi
BMW
Citroen
Dacia
Fiat
Ford
Honda
Hyundai
Jaguar
Kia
Land Rover
Mazda
Mercedes-Benz
Mini
Nissan
Peugeot
Renault
Seat
Škoda UK
Suzuki
Toyota
Vauxhall
Volkswagen
Volvo

Banks & Building Societies

Bank of Scotland
Barclays
first direct
Halifax
HSBC
Lloyds
M & S
Nationwide
NatWest
RBS
Sainsbury's
Santander
Tesco
The Co-operative Bank
TSB

Insurance

AA Insurance
Admiral
Allianz
Aviva
AXA
Churchill
Co-op Insurance
Direct Line
Esure
Halifax
Hastings Direct Insurance
Legal and General
Lloyds
LV=

M & S (insurance)
More Than
Nationwide Insurance
Privilege
Prudential
RAC
SAGA Insurance
Sainsbury's
Swinton
Tesco
Zurich

Leisure

Burger King
Caffe Nero
Cineworld
Costa Coffee
Domino's Pizza
Frankie and Bennys
Greggs
Harvester
JD Wetherspoon
KFC
McDonalds
Nando's
Netflix
Odeon
Pizza Express
Pizza Hut
Pret A Manger
Spotify
Starbucks
Subway
TicketMaster
Toby Carvery
Vue Cinema
your local restaurant/takeaway

Public Services (Local)

GP surgery / health centre
Library
your Housing Association
your local Ambulance Service
your local Council
your local Fire Service
your local Police Service

Public Services (National)

Disclosure and Barring Service
(formerly Criminal Records Bureau (CRB))
DVLA
Highways England
HM Passport Office
HMRC (Inland Revenue)
Jobcentre Plus
NHS / hospital service
Post Office
The university I attend

Retail (Food)

Aldi
ASDA
Co-op Food
Iceland
Lidl
M & S (food)
Morrisons
Ocado
Sainsbury's
Tesco
Waitrose

Retail (Non-food)

Amazon.co.uk
Apple
Argos
B&Q
Boots UK
Currys/PC World
Debenhams
Ebay
H&M
Holland & Barrett
Home Bargains
Ikea
John Lewis
M & S
Matalan
New Look
Next
Pets at Home
Poundland
Primark
Specsavers
Sports Direct
Superdrug
TK Maxx
Wilko

Services

AA
Avis
British Gas Home Services
DHL
DPD
Enterprise Rent-A-Car
Green Flag
Halfords autcentre
Hermes
Hertz
Homeserve
Kwik Fit
RAC
Royal Mail / Parcelforce
Timpson
TNT
Uber

Western Union
Yodel
your local solicitor
your local tradesman e.g. builder,
electrician, painter & decorator,
plumber

Telecommunications & Media

BT
EE (including T-Mobile or Orange)
giffgaff
O2
Plusnet
Sky
Sky Mobile
TalkTalk
Tesco Mobile
Three
Utility Warehouse
Virgin Media
Virgin Mobile
Vodafone

Tourism

booking.com
Butlins
Center Parcs
Expedia
Haven Holidays
Hilton
Holiday Inn
Hoseasons
Jet2holidays.com
Lastminute.com
Marriott
PGO Cruises
Premier Inn
SAGA Holidays
Thomas Cook
Thomson Holidays
Travelodge
Trivago
Virgin Holidays

Transport

Abellio Scot Rail
Arriva Trains Wales
Arriva- Bus group
British Airways
Brittany Ferries
CrossCountry
East Midlands Trains
easyJet
Eurotunnel
First Group - bus companies
Flybe
Gatwick Express
Great Northern

Great Western Railway
Greater Anglia
Heathrow Express
Jet2
London North Eastern Railway
London Underground
National Express
Northern
P&O Ferries
Ryanair
South Western Railway
Southeastern (train operating company)
Southern Railway
Stagecoach (Bus)
Thameslink
The Trainline.com
Thomson Airways
TransPennine Express
Virgin Atlantic
Virgin Trains
Virgin Trains East Coast

Utilities

Affinity Water
Anglian Water
Bristol Water
British Gas
Dwr Cymru (Welsh Water)
E.ON (energy)
EDF Energy
Essex and Suffolk Water
First Utility
M & S Energy
Northern Ireland Water
Northumbrian Water
npower
OVO Energy
Power NI
Scottish and Southern Energy (SSE)
Scottish Gas
Scottish Power
Scottish Water
Severn Trent Water
South East Water
South West Water
Southern Water
Thames Water
The Co-operative Energy
UK Power Networks
United Utilities (water)
Utility Warehouse
Wales and West Utilities
Wessex Water
Yorkshire Water

About the UKCSI

A barometer of customer satisfaction in the UK since 2008

The UKCSI (UK Customer Satisfaction Index) provides insight into the state of customer satisfaction in the UK for 13 key sectors. The UKCSI is published twice a year, in January and July. Each UKCSI incorporates two sets of data to create a rolling measure of customer satisfaction. The January 2019 UKCSI includes responses from surveys conducted between 15 March to 12 April 2018 and 17 September to 15 October 2018.

Over 10,000 customers

The UKCSI is based on an online survey of over 10,000 consumers, who are representative of the UK adult population by region, age and gender. The January 2019 UKCSI comprises 45,000 responses, 3,000 from each sector except for Transport and Utilities which include 6,000 responses each. Customers are asked to rate their experience of dealing with a specific organisation in the previous three months. Customers rate only one organisation per sector. Each customer can complete the survey for up to five different sectors.

Over 25 metrics of the quality of customers' interactions and relationship with organisations

Customers rate the quality of their experiences and relationship with organisations on over 25 metrics including employee professionalism, product / service quality, ease of dealing with an organisation, timeliness, complaint handling

and attitudes towards trust, reputation, an organisation's customer ethos and ethical behaviour. Metrics reflect the priorities identified by customers, as well as attributes that show a strong relationship with overall customer satisfaction*. The UKCSI also includes measures of customer effort and a Net Promoter Score (NPS). Customers rate organisations on a scale of 1 – 10 except for the question "how likely would you be to recommend xx to friends and family", which is a scale of 0 – 10.

259 organisations received a UKCSI rating

These include 247 named organisations and 12 generic providers including "your local Council", "your local restaurant/takeaway" etc. Customers select an organisation to rate from a randomised list of leading and emerging players in each sector which is reviewed before each UKCSI. Customers can also select an organisation to rate that is not on the list. Organisations which exceed a minimum sample size are given a score and are named within one of the 13 sector reports.

How the UKCSI is calculated

Index scores are expressed as a number out of 100. The UKCSI score for each organisation is the average of all of its customers' satisfaction scores, multiplied by ten, with a weighting applied reflecting the priority score for each measure. The sector score is the mean average of all responses for that sector, multiplied by ten. The overall UKCSI is based on the mean average of each sector's score.

* See *Experiences, Emotions and Ethics: refreshing the customer priorities that underpin the UK Customer Satisfaction Index*, available at www.instituteofcustomerservice.com/research. It is free to Institute organisational members and available for purchase by non members.

UKCSI sector reports*

13 reports are available with sector-specific insight and recommendations

- Customer satisfaction performance of leading organisations on over 30 customer experience metrics
- Channel use and satisfaction
- Drivers of complaints and satisfaction with complaint handling
- Links between satisfaction and future buying behaviours
- Recommendations and opportunities to improve



Sector resource packs

- Key sector and organisational measures in spreadsheet format
- Sector satisfaction by age, region, gender
- Word cloud summarising how customers feel about their experiences with organisations
- Satisfaction by product type in the Banking, Insurance and Telecommunications & Media sectors

Sub-sector customer experience measures

- Leisure (Quick Service Restaurants)
- Transport (Air; Rail; Coach / Bus)
- Retail Non-food (Fashion retailers)
- Utilities (Energy; Water)

Automotive

Banks & Building Societies

Insurance

Leisure

Public Services (Local)

Public Services (National)

Retail (Food)

Retail (Non-food)

Services

Telecommunications & Media

Tourism

Transport

Utilities

* Two sector reports are available as a membership benefit to The Institute's Trusted Advisory Network members; one report for Discovery Roadmap and Council members. For Corporate and Pathway members, discounts apply.

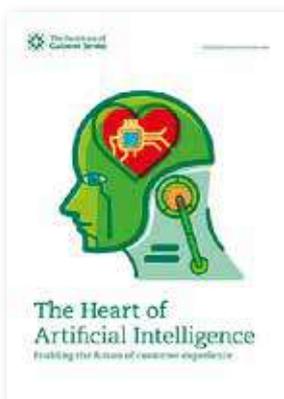
Sector reports are available for purchase by non members at www.instituteofcustomerservice.com or contact us at enquiries@icsmail.co.uk

Breakthrough research from The Institute



Productivity UK: Generating sustainable value from service

- Defines the key characteristics of service productivity
- Assesses the current state of productivity in the UK and its impact on customers and organisations
- Examines how organisations can improve productivity to deliver better customer satisfaction, employee engagement and performance
- Recommends a practical framework to improve and measure productivity.



The Heart of Artificial Intelligence: Enabling the future of customer experience

- Investigates how and why organisations are deploying artificial intelligence in a customer experience context
- Assesses customers' current use of artificial intelligence and attitudes towards its wider implementation
- Examines employees' experience of artificial intelligence and their perceptions about how it affects the customer experience and their job role
- Identifies the key enablers for successful deployment of artificial intelligence in a customer experience context.

To find out more about The Institute's research programme, contact us at:
T: 0207 260 2620
E: enquiries@icsmail.co.uk



The Customer Service Dividend: How organisations have achieved ROI and greater productivity

- Examines the relationship between customer satisfaction and financial metrics from both a short and long-term perspective
- Demonstrates that organisations maintaining higher customer satisfaction than their sector average tend to achieve better turnover growth, profit and employee productivity
- Highlights the key investments that have delivered improvements in both customer satisfaction and financial performance, and the key enablers to achieving return on investment.



The Customer Knows: How employee engagement creates greater customer satisfaction and loyalty

- Based on research with customers, employees, senior leaders and evidence about the relationship between organisations' employee engagement and customer satisfaction
- Examines best practice in developing employee engagement to improve customer service, identifying six essential elements
- Provides a recommended set of measures of employee engagement and a checklist of factors to consider in running an employee engagement survey
- Recommends practical ways to measure the impact of engagement on customer satisfaction and business performance.

About The Institute of Customer Service

The Institute of Customer Service is the UK's independent, professional body for customer service.

Our purpose is to enable organisations to achieve tangible business benefits through excellent customer service aligned to their business goals and to help individuals maximise their career potential and employability by developing their customer service skills.

We provide tools and services to support continuous customer service improvement and a framework for our members to share and learn from each other.

We are independent – setting standards so that our customers can improve their customers' experiences and their business performance.

The Institute is the secretariat for the All Party Parliamentary Group on Customer Service.

Key Activities

- Research and reports on the latest customer service trends and thinking
- Publication of the UK Customer Satisfaction Index (UKCSI) twice a year
- Benchmarking customer experience to identify areas for improvement, drawing on the views of both customers and employees
- Bespoke customer insight and research
- Training and accreditation programmes for customer service professionals
- Professional qualifications for individuals at all stages of their career
- Public policy development.

For further information please visit
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