



# Consumer satisfaction benchmarking report 2013

## Executive summary

This report details the findings of Aspect's study into the views of UK consumers when it comes to dealing with the customer service function in the private and public sector. Vanson Bourne surveyed 1,000 UK consumers over the age of 16, from all over the UK, in April 2013 to discover what makes the modern family of 'Nuclear Consumers' tick.

### The key findings detailed in this report are:

- Almost half (47 per cent) of consumers reported that they could recall at least one good customer service experience in the past 12 months. 1 in 5 consumers (20 per cent) could not recall one instance of good customer service in the past year.
- Almost a third of consumers (32 per cent) were able to recall at least one incidence of bad customer service in the past year, with 2 instances on average. Half as many consumers again can recall a good experience.
- Online retailers lead the pack in terms of good customer experience overall, with 78 per cent claiming that they were extremely satisfied or satisfied with the service that they receive. They're also seen as having the best public image in terms of customer service.
- Internet service providers (ISPs) provided the most inconsistent levels of customer service. They were cited for most of the individual instances of good customer service, for 31 per cent of consumers, but are only placed 7th out of 13 options for type of organisation when it comes to satisfaction. Most individual incidences of bad customer service also stem from ISPs, with 27 per cent of those who have had a bad customer experience identifying them as the source.
- Two thirds of consumers who reported a good customer experience in the last 12 months say that it is down to friendly and approachable staff and over half (52 per cent) of the sample said that an organisation simply 'doing what it said it would do' meant it was a memorable experience. Consumers prefer a quick resolution (55 per cent) more than over-servicing (45 per cent).
- Banks and building societies perform consistently well when it comes to customer service, often taking the second or third spot for both perception and actual experiences. But their customers are much more likely to be vocal about bad experiences.
- 67 per cent of bad customer service experiences in the last 12 months prompted a complaint, with older age groups more likely to complain. A quarter (25 per cent) of consumers who made a complaint say that it was unresolved, and 38 per cent said that the resolution that they did receive wasn't acceptable.
- In a UK population of 63 million people aged over 16 in the UK, there are around 3.4 million consumers with at least one unresolved complaint, and 9 million when unsatisfactorily resolved complaints are taken into account.
- More than 2 in 5 (44 per cent) consumers have changed at least one supplier in the last 12 months. Most commonly, over a quarter (26 per cent) of consumers have switched insurance provider.
- 13 per cent of consumers would switch provider due to an unresolved complaint, but 30 per cent would switch due to at least one incidence of bad customer service.
- 1 in 5 (20 per cent) consumers has aired their frustration with a company via social media. However, not everyone gets, or expects a response, since only 3 in 5 consumers claim to have had a response from an organisation after talking about them online.

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## Methodology and sampling

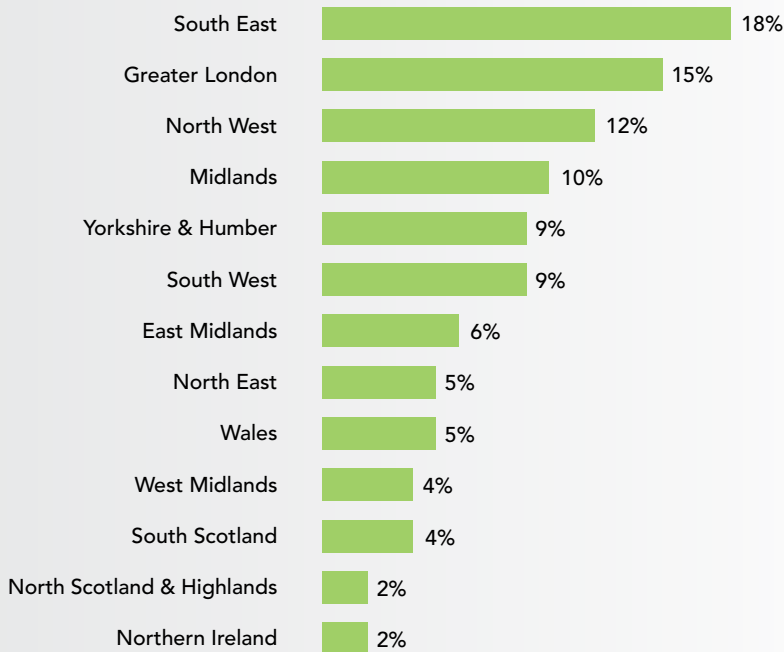
In April 2013, Aspect commissioned Vanson Bourne to find out the current state of consumer satisfaction among the UK population with several common public and private sector suppliers.

The study aims to get a strong understanding of what the modern 'nuclear family' of UK consumers now expects from these organisations, how they choose to interact with them, and how the changing customer conversation has affected perceptions of customer service and the contact centre, as well as if and when they choose to switch providers.

The research is based upon a survey of a sample of 1,000 UK consumers, aged 16 and over, with equal weighting on gender and age. Most results have been split by provider, in order to ascertain where discrepancies in the quality of service lie.

Geographically, respondents were split into the regions displayed in fig.1.

**Fig.1** In which region of the UK do you live? (Base: 1,000 consumers)



**FACT!** Different age ranges are likely to have experienced good customer service from different sources

The types of providers that this study looked at are displayed in fig.2. It is assumed that some of these suppliers are the same for some products and services, so these organisations are treated as separate providers of each service, since the quality of service delivered could vary between markets. This intelligence paper summarises the results of this research, benchmarks providers against each other and by question, and also offers analysis on findings of interest.

**Fig.2 Which of the following types of organisation do you use/subscribe to?** (Base: 1,000 consumers)

Organisation	Total	Age 16-24	Age 25-34	Age 35-44	Age 45-54	Age 55+
Internet service provider	91%	82%	87%	94%	95%	96%
Mobile network provider	88%	88%	88%	88%	89%	88%
Electric/energy supplier	87%	66%	84%	93%	97%	98%
Bank/building society	87%	72%	84%	89%	95%	96%
Landline provider	85%	65%	80%	89%	95%	95%
Water supplier	81%	57%	76%	87%	92%	92%
Gas supplier	76%	57%	77%	82%	81%	86%
Insurance company (including car, home, pet, life etc)	75%	44%	67%	82%	89%	93%
Local public sector (e.g. council)	67%	36%	63%	75%	78%	85%
Credit card provider	59%	28%	58%	62%	74%	76%
Subscription television provider (including digital, satellite, and streaming)	53%	44%	51%	62%	57%	53%
Online retailer	40%	31%	34%	39%	49%	50%
Loan provider	14%	10%	21%	17%	16%	8%
Base	1,000	200	200	200	200	200

**FACT!** Males are more likely than females to have experienced good customer service from a mobile phone operator

## 1. What makes 'good' customer service?

The study asked the sample to isolate the last 12 months and think back to the times that they have contacted organisations that they have used or dealt with, and the experience that they had.

Almost half (47 per cent) reported that they did have at least one good customer service experience (remembering on average 2 counts); with any of the types of organisation they said that they use. A further third (33 per cent) had not made contact with any of the listed organisation types, whether they use them or not.

In what should start to ring alarm bells for providers, 1 in 5 consumers (20 per cent) said that they could not recall one instance of good customer service over the past year.

Those in the youngest age group (16-24) were most likely to have made contact with an organisation in the last 12 months and recall a good experience, with those in the next age group (25-34) most likely to have made contact and not be able to recall a good customer experience. Conversely, those in the oldest age group (55+) are the least likely to have made contact with an organisation that they use, and not be able to say they had any good experiences.

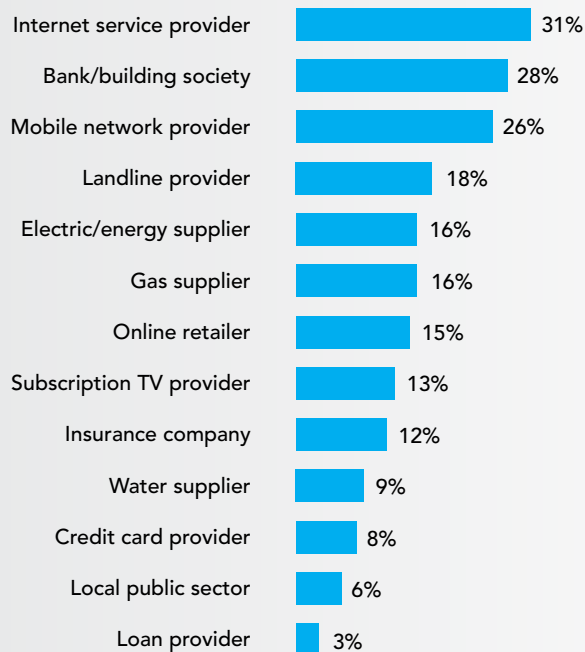
**Fig.3 Looking back over the last 12 months, has there been a particularly good customer experience that stands out for you?** (Base: 1,000 consumers seeing answers from fig.2)

Organisation	Total	Age 16-24	Age 25-34	Age 35-44	Age 45-54	Age 55+
Internet service provider	15%	20%	14%	11%	13%	16%
Bank/building society	13%	15%	13%	9%	13%	18%
Mobile network provider	13%	25%	12%	15%	6%	6%
Landline provider	8%	7%	10%	11%	7%	8%
Electric/energy supplier	8%	6%	8%	10%	7%	9%
Gas supplier	8%	5%	11%	8%	6%	8%
Online retailer	7%	9%	3%	8%	7%	10%
Subscription television provider	6%	6%	8%	7%	6%	5%
Insurance company	6%	7%	6%	4%	5%	7%
Water supplier	4%	4%	5%	5%	5%	3%
Credit card provider	4%	3%	6%	4%	2%	4%
Local public sector	3%	3%	4%	4%	2%	2%
Loan provider	1%	1%	2%	1%	1%	2%
No, I have not had a good customer experience with any of the above types of organisations over the past 12 months - but I have made contact	20%	20%	26%	19%	20%	14%
No, but I have not made contact with any of the above companies in the last 12 months	33%	28%	38%	36%	30%	35%
Base	1,000	200	200	200	200	200

Of those that did report at least one good customer experience, it is ISPs that lead the pack for this sample, selected by almost a third (31 per cent) of consumers. In a blow for the financial services industry, and perhaps a telling sign of the sensitivity of the product, loan providers were least likely to have delivered a good customer experience. Just 3 per cent experienced a good customer service with this type of organisation.

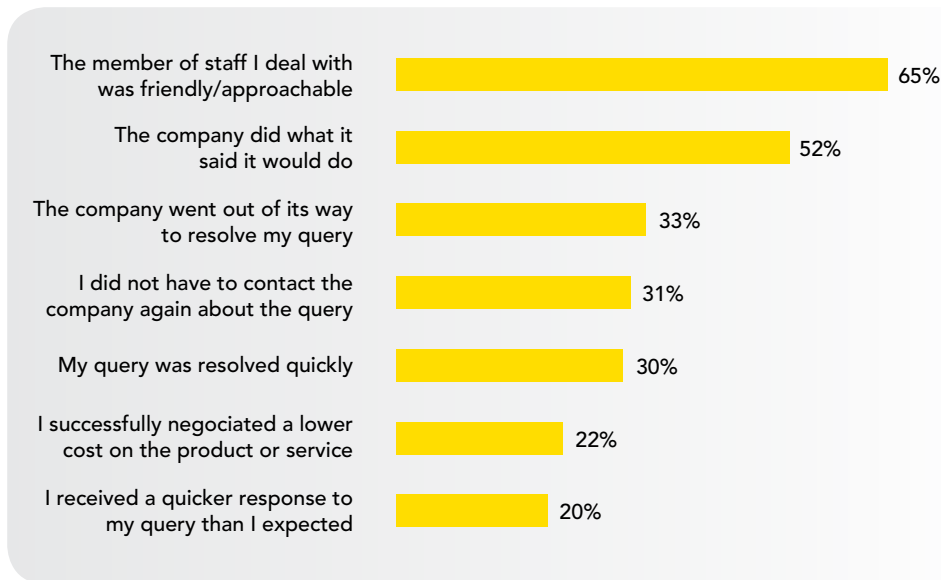
What is perhaps interesting to note here is the type of interaction one might have with an ISP, as opposed to a loan provider. For the former, monthly subscriptions, technical reliability, speed and resilience all count. With more and more of us needing and expecting to be connected to the Internet 24/7, as long as the ISP does what it says it will do, and does not fail or cause regular downtime, customers will not see reason for an unsatisfactory service. For the latter, collections is a big part of the customer service function. Not just to recuperate debt or chase late payments, but also to help customers achieve a mutually satisfactory resolution on repayments. It is a sensitive topic and one that always needs careful handling and compassion in order to reach a resolution.

**Fig.4 Which type of organisation provided this good customer experience(s)?**  
(Base: 473 consumers, who were able to recall at least one good customer experience)



**FACT!** Females are more likely than males to remember a friendly or approachable member of staff (70% versus 60%)

**Fig.5 Why did your good customer experience stand out for you?** (Base: 473 respondents, who were able to recall at least one good customer experience)



For those who were able to recall at least one incidence of good customer service in the past 12 months, two thirds (65 per cent) report that this is thanks to friendly and approachable staff. It is perhaps interesting to note that this does not necessarily mean that the incidence (or more) of good customer service resulted in a resolved interaction.

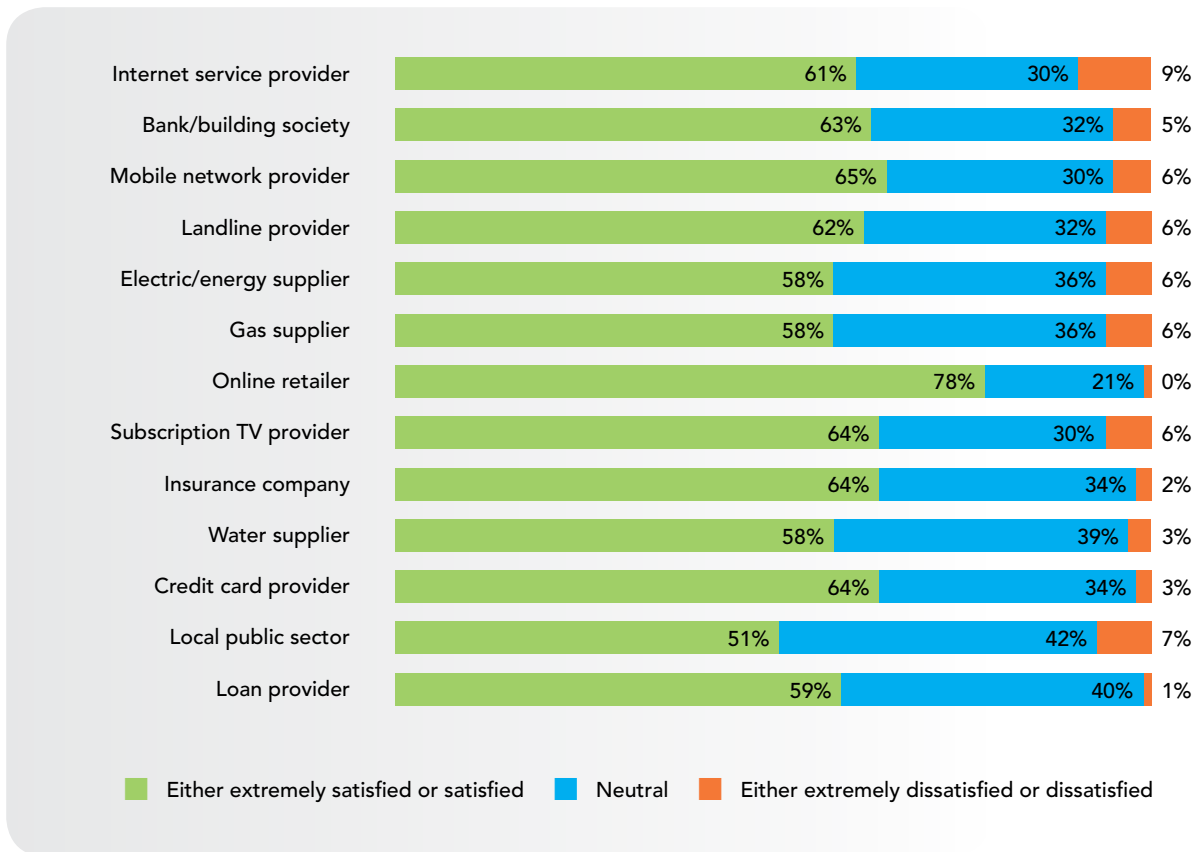
This question also reveals a key fact that beats even going ‘over and above’ or speed when it comes to customer service. Over half (52 per cent) of the sample said that an organisation simply ‘doing what it said it would do’ meant their experience was a positive – and memorable – one. 60 per cent of over 55s felt that just getting the job done was more important than those in the 25 to 34 age group, with 38 per cent.

Is this an indicator that consumers are less impressed with such a basic service, and expect more in order to perceive it as a ‘good’ experience?

When asked how satisfied consumers were overall with customer service from the organisations that they use, over three quarters of consumers say that they are either extremely satisfied or satisfied with online retailers (78 per cent), followed by mobile network providers (65 per cent).

**FACT!** Whether consumers use them or not, ISPs and mobile network providers are most likely to be placed in the top 3 for good customer service

**Fig.6 How satisfied are you with the quality of customer service that you receive on average?** (Base: 1,000 consumers)



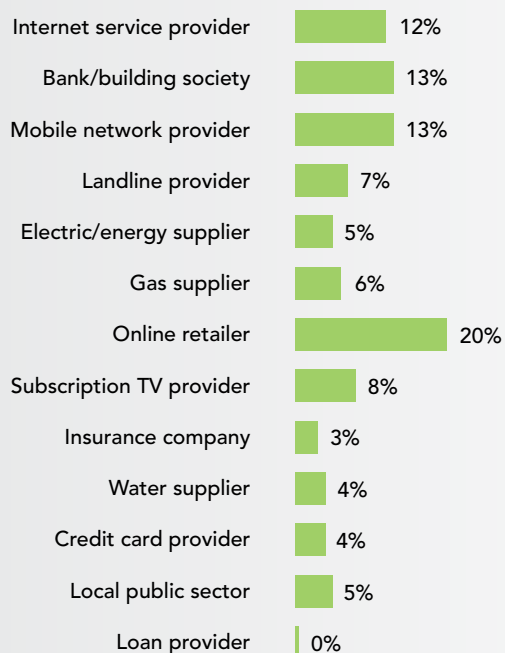
ISPs are placed only 7th out of the 13 organisation types listed with 61 per cent of their users describing themselves as either satisfied or extremely satisfied by their customer service.

When it does come down to the public perception, regardless of whether consumers use them or not, online retailers are seen as the type of organisation that is best regarded for customer service, chosen by 1 in 5 respondents (20 per cent). What is perhaps interesting to note is that ISPs are placed 4th, despite being the top when it comes to individual instances of 'good' customer service. Again this indicates that consistent delivery of a service – rather than the 'one and done' style processes of an online retailer – can sometimes be taken for granted. If it fails, it fails hard. If it continues to deliver the expected level of service, it whirs away silently in the background.

**FACT!** Those aged over 55 are least likely to say that they were dissatisfied with customer service from any organisation, and most likely to be satisfied



**Fig.7 Which types of companies do you think offer the highest standards of customer service?** (Responses ranked 1, base: 1,000 consumers)



Online retailers are rewarded in this study with a strong public perception of customer service, and are consistently chosen as the outright winner when it comes to end user experience. This is perhaps telling of the problems that the high street is having, since it was reported in latest figures from PricewaterhouseCoopers that up to 28 shops per day were closing in early 2013 (up 8 from 2012)<sup>1</sup>. E-commerce on the other hand, is flourishing, and the UK market was reported to be worth a cool £77 billion last year<sup>2</sup>.

But let's not discount the banks/building societies at this point. The industry performs consistently well for customer service throughout the study, and it is ranked second behind online retailer for overall customer service, and third when responses ranked 1, 2 and 3 are combined. It also pulls second place when it comes to recalling incidences of good customer service. Aspect's 2012 Banking and Insurance Consumer Satisfaction Report, discovered that customers of banks and building societies are more 'passionate and committed' to the relationship that they have with these types of provider, but are more vocal about the incidences of bad customer service, and the things that these providers could do to improve the service they deliver. It's also worth noting that banks and building societies, in some respects in comparison with the other types of organisation studied in this report, are most likely to have a high street presence – a human factor. This is clearly an important facet of good customer service as being 'friendly and approachable' is ranked as the number one reason for memorable, positive customer experiences.

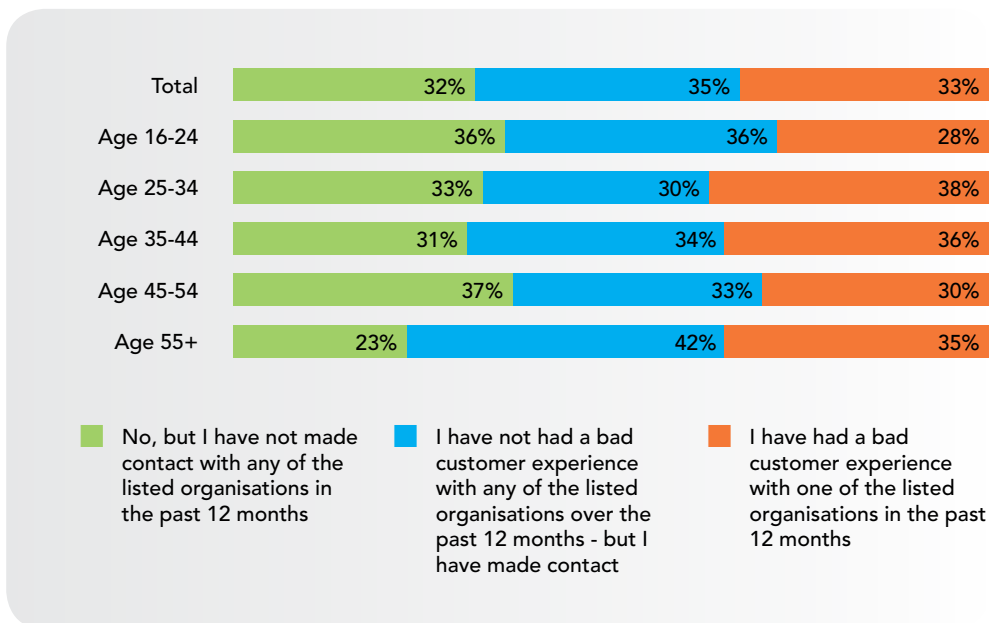
<sup>1</sup> <http://www.independent.co.uk/news/uk/home-news/retail-chains-shut-20-shops-a-day-8514107.html>

<sup>2</sup> <http://www.businesscomputingworld.co.uk/e-commerce-trend-forecast-for-2013/>

## 2. Bad customer service and what drives it

When asked, almost a third of consumers (32 per cent) were able to recall at least one incidence of bad customer service, with 2 instances on average. This is a marked difference to the reported positive incidences, with half as many consumers better able to recall good customer service in the last year. There is almost a 10 per cent difference between the average and for those over 55, who are more likely to be unable to recall bad customer service.

**Fig.8 Which types of companies do you think offer the highest standards of customer service?** (Responses ranked 1, base: 1,000 consumers)

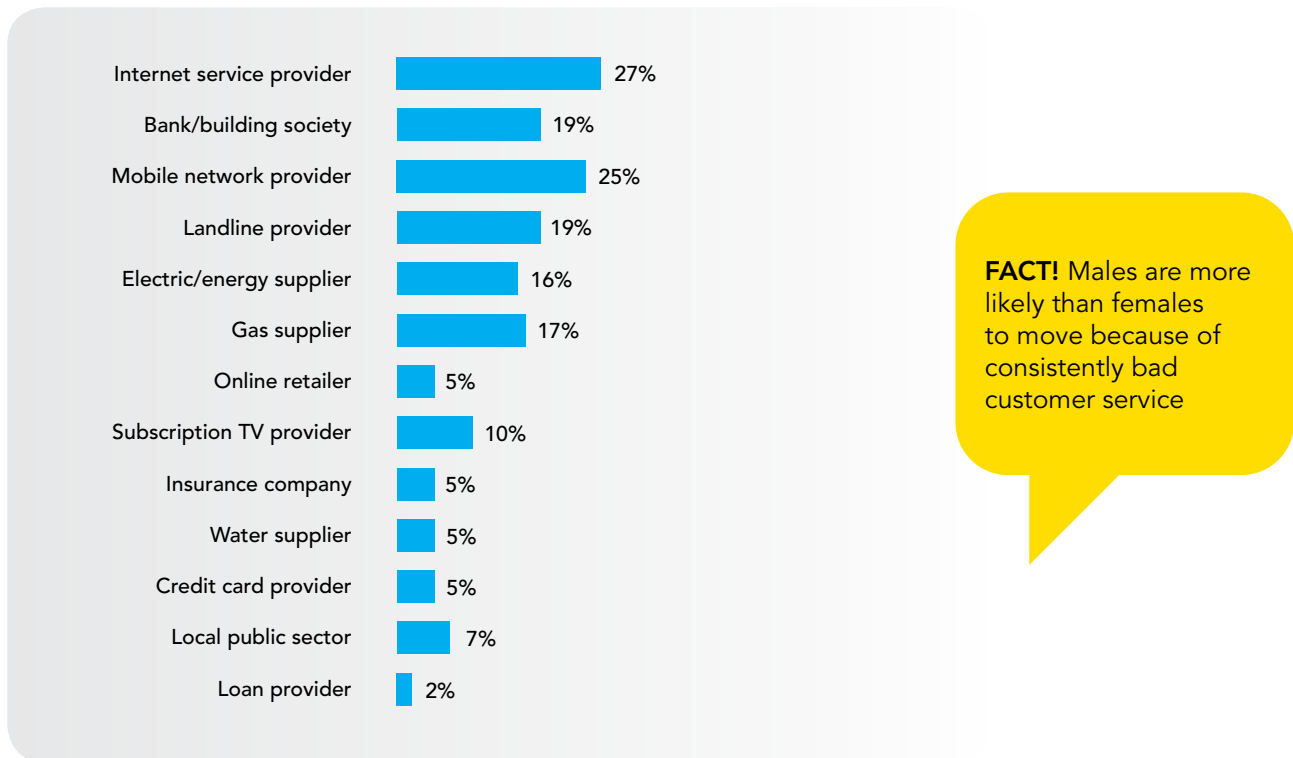


Most incidences of bad customer service stem from ISPs, with 27 per cent of those who have had a bad customer experience identifying this as the source. This inconsistency with ISPs also lies with mobile network providers, which equally see them taking the top two spots when consumers recall good, and bad, customer experiences. One possible explanation for this is again the type of service they provide. With most developed countries increasingly being connected 24/7, whenever and wherever they are, any lapse in service is unacceptable. Consider the facts: by 2015, over three quarters of the UK population (75.5 per cent) is expected to own a smart phone, with a quarter (25 per cent) owning a tablet computer<sup>3</sup>. Increasing aspects of our every day lives are being dominated by the Internet and mobile technology, and the public's need to be 'always on' means the pressure is on these types of providers.

**FACT!** People over 55 are more likely to recall better customer experience from their banks than any other supplier, and any other age group

<sup>3</sup> <http://www.standard.co.uk/business/business-news/smartphones-tipped-to-dominate-uk-by-2015-but-ireland-storms-ahead-8489971.html>

**Fig.9 Which type of organisation was responsible for this bad customer service experience?** (Base: 322 consumers who could recall a bad customer experience)



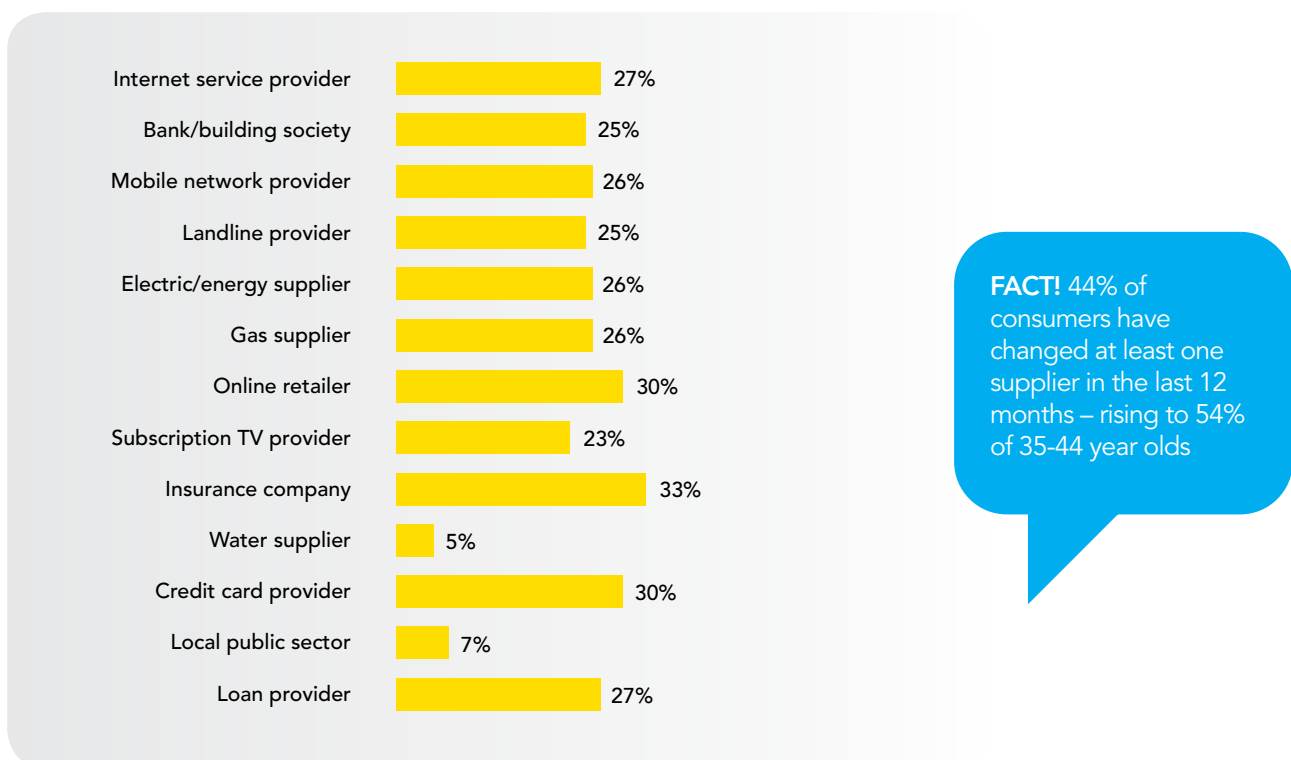
Where people have had a bad customer experience, it typically emanates from the contact centre, with almost half (48 per cent) stating it was because of the service they got or from long telephone queue times (35 per cent). Older respondents are more likely to blame bad customer service on factors such as: "the initial query went unanswered", or "it took too long to get a response", "the organisation did not do something it said it would", or "poor customer service from the call centre". 16 to 24 year-olds on the other hand, are more likely to be bothered by an incorrect bill, or confusing or incorrect documents.

In the eyes of the UK public, organisations are failing to put right issues that have consistently dogged contact centres with a bad reputation for many years. For many organisations, the contact centre is the first point of interaction (whether that's via voice, email, instant messaging or any other channel) for its customers. The fact that half of consumers surveyed here say that their bad customer service experiences are caused by the contact centre, should be a warning to work to solve these issues.

But how bad is 'bad' customer service? At what point do people decide to move to a competitor? Is this easier for some industries than others?

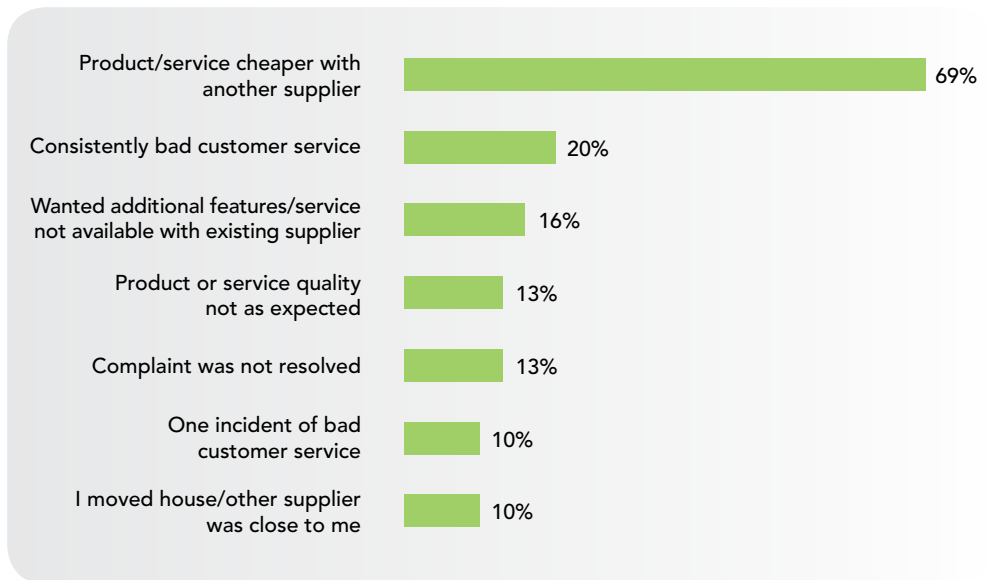
Overall, between a quarter (23 per cent) and a third (33 per cent) of consumers would switch a provider after just one incidence of customer service, whatever the organisation. If they experience bad customer service, consumers are most likely to stop using an insurance provider (33 per cent), a credit card provider (30 per cent) or an online retailer (30 per cent), with approximately a third of respondents reporting this. When looking at the other types of organisation in this study, it makes sense to say that the ease of switching is driving this. With incentives, cash back, discounts and competitive pricing being offered by these types of organisation, as well as a wealth of comparison screen scrapers (such as MoneySuperMarket, Google Shopping etc.) available at the click of a button, consumers can switch providers in a few clicks online. Providers have to work much harder to keep customers in these markets, but does this include improving customer service quality? It is also worth considering that harder to move providers, such as subscription television (which quite often comes as a contract package and also has fewer players in the market), banks/building societies and landline providers, are less likely to initiate a switch after bad customer service.

**Fig.10** Percentage of consumers who would switch from each of the above types of organisation after one incidence of bad customer service (Base: 1,000 consumers)



Although in this case, it does seem that words speak louder than actions, as the genuine switching rate is slightly lower. Of those who did actually change any supplier in the past 12 months, the overwhelmingly most common motivator is that the product/service was cheaper with another supplier (69 per cent); this is consistent across all ages and genders as the primary reason. But it is more important to older age groups, as over three quarters (77 per cent) of those aged over 55 changed a provider because of price, compared to just over half (51 per cent) of those aged 16-24.

**Fig.11 Why have you changed providers over the past 12 months?** (Base: 450 consumers who have changed suppliers over the last 12 months)



1 in 5 (20 per cent) consumers say the cause was consistently bad customer service, and 1 in 10 (10 per cent) say it was just one instance of poor customer service that triggered the move. This is more common in younger age groups. Potentially the interesting trend here is unresolved complaints, with 13 per cent saying that they switched due to this reason.

**FACT!** Males are more likely than females to move because of consistently bad customer service

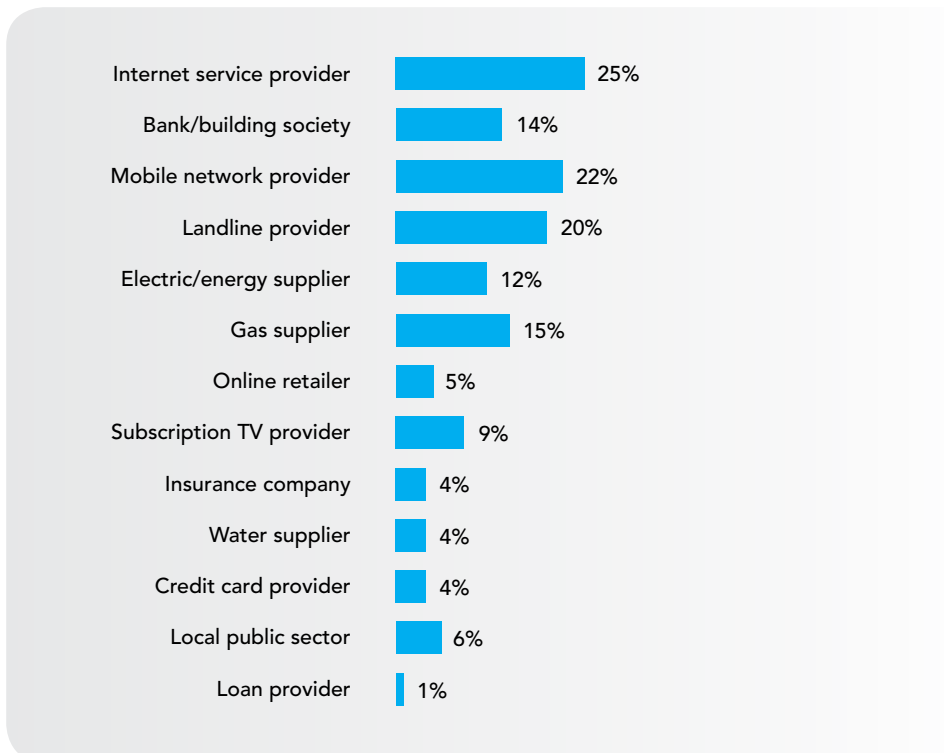
### 3. The anatomy of a complaint

What happens when customer service is considered so bad that it triggers an official complaint?

Of the 32 per cent of respondents who had a bad customer experience in the past twelve months the majority (67 per cent) did complain about it to their provider. Older age groups are more likely to make an official complaint than younger ones.

Again, ISPs rear their head again, as the most likely to receive a complaint about bad customer service, with a quarter (25 per cent) of their customers who had bad customer service making a complaint.

**Fig.12 Which of these types of companies did you make a complaint about?** (Base: 216 consumers who had a bad customer experience and chose to complain)



When it comes to actually making the complaint, consumers most commonly choose the telephone. Interestingly, only complaints to water suppliers, insurance companies and online retailers deviate; the most used channel for those being email. This is consistent with the earlier discovery that most issues to do with customer service stem from the contact centre, although many consumers may be unaware that in the modern multi-channel contact centre, all customer interactions, whatever the challenge, will be handled from there. Online retailers often choose to cut operational expenses by not having a physical high street presence, and selling online also reduces costs that other organisations have. Perhaps consumers favouring email is an indicator that online retailers (of any size) are less likely to have a voice-based customer service function in place.

**Fig.13 Which methods of contact did you use to complain to each of the organisations?**  
 (Base: 216 consumers who had a bad experience and chose to complain)

Organisation	Total							Base
	Telephone	Letter	E-mail	Instant chat/ messenger	SMS	Social media	Face to face	
Landline provider	84%	9%	40%	2%	0%	5%	2%	43
Mobile network provider	60%	23%	35%	13%	8%	6%	6%	48
Internet service provider	72%	13%	40%	8%	0%	4%	6%	53
Subscription television provider	75%	15%	35%	10%	5%	0%	0%	20
Gas supplier	59%	22%	44%	0%	6%	6%	0%	32
Electric/energy supplier	68%	20%	44%	4%	0%	8%	4%	25
Water supplier	33%	22%	56%	0%	0%	0%	11%	9
Local public sector	38%	31%	31%	0%	8%	8%	23%	13
Bank/building society	57%	27%	37%	7%	3%	0%	33%	30
Insurance company	38%	13%	63%	0%	0%	13%	13%	8
Credit card provider	67%	33%	44%	0%	0%	0%	0%	9
Loan provider	67%	33%	0%	33%	0%	0%	33%	3
Online retailer	45%	0%	82%	0%	9%	0%	0%	11

It is also worth noting where social media lies in the results for this question. Insurance companies are overwhelmingly ahead when it comes to choosing to complain via social media, with 13 per cent of respondents choosing this method. This is as much as those that chose email to complain. The difference with social media of course, is the fact that it is a one-to-many communication model. While an email or a phone call can remain relatively secure and private, social media is extremely public. Perhaps then, these companies should be concerned that their customers are openly complaining about the service that they receive in a public forum, and either make it easier to complain via other methods or reduce the reasons for customers to complain in the first place. Insurance is another tricky industry; other than renewing policies once a year or buying a new one, the main reason that people would need to interact with them is to claim, which is often a period of stress and worry. Emotions are heightened, and customer service should be handled carefully. This could be a reasonable explanation for the rather knee-jerk response to make negative comments via Twitter or Facebook.

A 2013 Aspect survey of 100 UK-based business professionals found that almost three quarters (72 per cent) claim to use social media within their organisation, but only the minority (40 per cent) state that they use it as a two-way conversational tool with customers. Only 32 per cent admit that they do take customer communications (including complaints), but don't do anything about it. With over half (52 per cent) of the professionals surveyed claiming that social media will overtake the telephone as the main method of customer engagement by 2020, it's clear from this report that we still have a long way to go to effectively manage this seriously.

Although the majority of customer service complaints are eventually resolved, this is not always so. A quarter (25 per cent) of consumers who made a complaint say it is unresolved (this is 5.4 per cent of the 1,000 consumers in the sample).

**Fig.14 How quickly was your complaint dealt with?** (Base: 216 consumers who had a bad customer service experience and chose to complain)

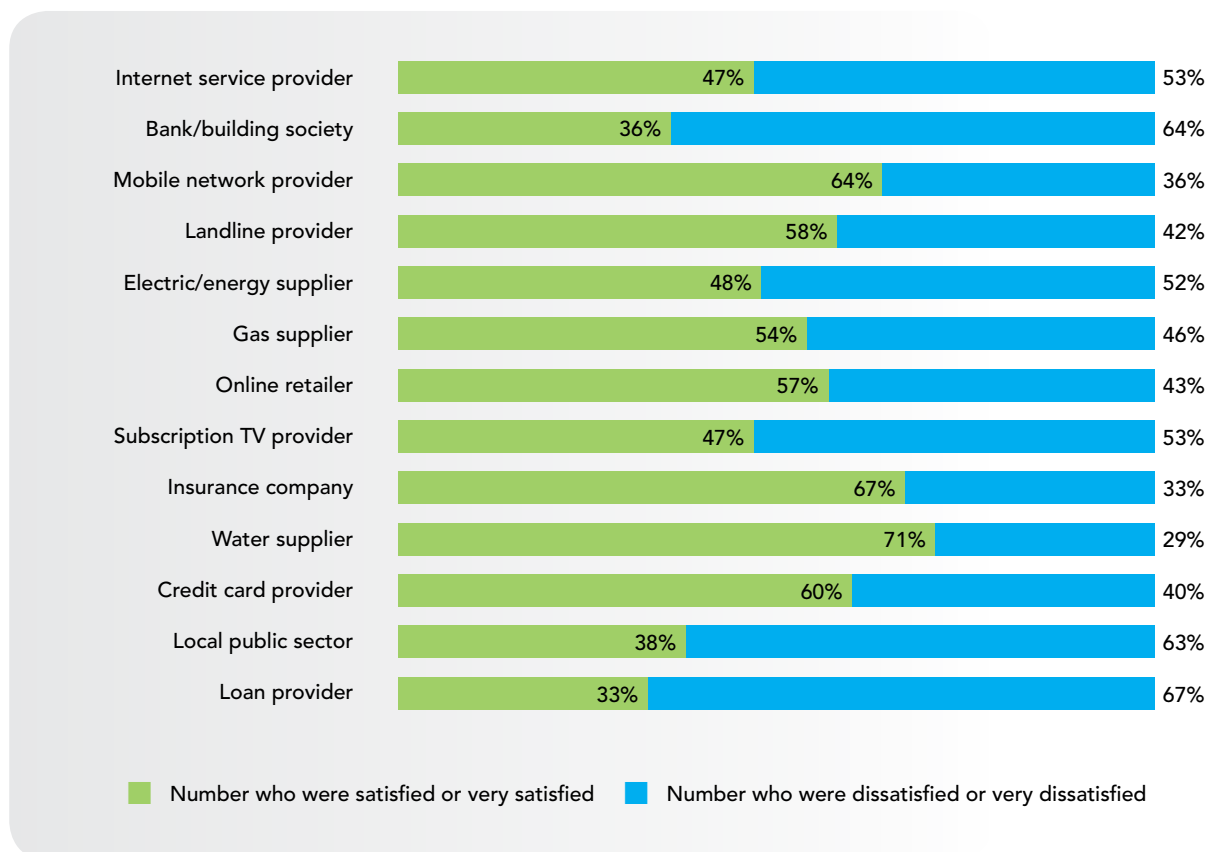
Total: How the complaint was resolved...							
Organisation	During the interaction	The same day	Within a few days	Within a week	Longer than a week	Was not resolved	Base
Landline provider	17%	14%	19%	5%	21%	24%	43
Mobile network provider	13%	23%	19%	4%	17%	25%	48
Internet service provider	2%	11%	19%	9%	26%	32%	53
Subscription television provider	5%	5%	45%	10%	10%	25%	20
Gas supplier	9%	6%	13%	19%	34%	19%	32
Electric/energy supplier	0%	21%	8%	13%	42%	17%	25
Water supplier	0%	22%	11%	22%	22%	22%	9
Local public sector	15%	0%	8%	0%	38%	38%	13
Bank/building society	13%	10%	3%	17%	30%	27%	30
Insurance company	0%	38%	25%	13%	0%	25%	8
Credit card provider	22%	11%	22%	0%	0%	44%	9
Loan provider	0%	0%	67%	0%	33%	0%	3
Online retailer	9%	0%	27%	0%	27%	36%	11

Looking at what makes for a satisfactory resolution, consumers are split: just over half (55 per cent) of respondents want a complaint to be resolved quickly compared to 45 per cent whose preference would be that the organisation go beyond what is expected at the expense of it all taking longer. All ages and both genders agreed that a quick response is marginally more important than over-servicing.

**FACT!** Those in different age groups are more likely to complain about completely different types of organisation



**Fig.15 How satisfied are you with the way that your complaint was dealt with?** (Base: 162 consumers who had their complaint resolved)



When it comes to type of organisation and level of satisfaction with a resolution, there are some trends to note. While 71 per cent of consumers that complained to their water supplier were satisfied by how the complaint was handled, in the case of banks/building societies, 64 per cent were left dissatisfied. This again harks back to the relationships that people have with their banks, which appears to be very much a love/hate scenario. When they are good, they are very good, and when they are bad, their customers are vocal about it.

Overall, half (50 per cent) of the 162 people that complained and got a resolution, were dissatisfied or very dissatisfied with the resolution they were offered. This means that of the 216 consumers in total that made a complaint, a quarter (25 per cent) never even saw a resolution, and 38 per cent were left unsatisfied with the resolution. This is 14.5 per cent of the UK population aged over 16 years-old – around 9 million people with an unresolved complaint, or, an unsatisfactory resolution. Just in the last year!

## 4. Where does social media sit within customer service?

The study also briefly looked at the preferred method of contact per organisation type, with a focus on social media. As with the previous question about how consumers complained to an organisation, the majority of consumers chose the telephone to contact each organisation, across all ages and both genders, except for online retailer (majority of 69 per cent for email). But the split was not so even between telephone, letter, email, instant chat, SMS, social media and face-to-face.

As would be expected, customer interaction with banks and building societies saw at least 1 in 5 consumers (21 per cent) preferring to go into the branch than contact the call centre.

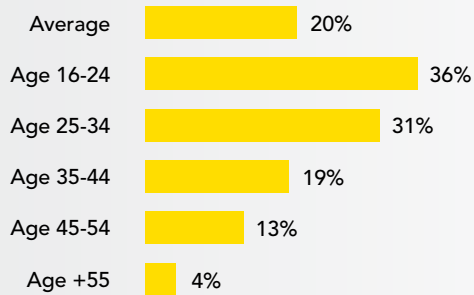
In this sample, only those under 34 used social media for contacting organisations, the most popular being online retailers for those aged between 16 and 24 (3 per cent), credit card provider (2 per cent of those aged between 16 and 24) and local public sector (2 per cent of those aged between 25 and 34).

**Fig.16 What is your preferred method of contacting each of these companies?** (Base: 1,000 consumers)

Organisation	Total							Base
	Telephone	Letter	E-mail	Instant chat/ messenger	SMS	Social media	Face to face	
Landline provider	60%	4%	34%	2%	0%	0%	0%	845
Mobile network provider	54%	4%	34%	3%	1%	0%	4%	880
Internet service provider	53%	4%	40%	3%	0%	0%	1%	908
Subscription television provider	57%	4%	36%	2%	1%	0%	1%	532
Gas supplier	53%	6%	38%	2%	0%	0%	1%	763
Electric/energy supplier	54%	5%	38%	2%	0%	0%	1%	874
Water supplier	54%	6%	37%	2%	0%	0%	0%	805
Local public sector	47%	7%	39%	2%	0%	0%	5%	672
Bank/building society	40%	5%	32%	2%	0%	0%	21%	868
Insurance company	52%	6%	36%	2%	0%	0%	3%	745
Credit card provider	53%	5%	38%	2%	0%	0%	2%	593
Loan provider	43%	11%	38%	3%	1%	0%	5%	141
Online retailer	24%	3%	69%	3%	0%	0%	1%	404

1 in 5 (20 per cent) consumers has aired their frustration with a provider via social media, at least once before. This is more common among younger consumers aged 16 to 24 and 25 to 34, with 36 per cent and 31 per cent respectively, compared to other age groups.

**Fig.17 Have you ever aired your frustration with an organisation on a social networking site?** (Base: 1,000 consumers)



Perhaps surprisingly however, not everyone gets, or even expects, a response. Only 3 in 5 consumers (61 per cent) admitted that they received a response from an organisation via social media after 'airing their frustration', while the rest were left with radio silence.

While social media is not a favourite method of contact, almost half (48 per cent) of the consumers surveyed would or do use it to contact organisations, again this is much more common among younger respondents. The same figure claims that they never use social media to interact with a brand they use. 38 per cent of all respondents (80 per cent of those who do or would use social media to contact an organisation) expect a response the same day. The trend continues, with younger respondents expecting a response, and a quicker one at that, demonstrating the increasing pressure on organisations to show that their customers are being heard.

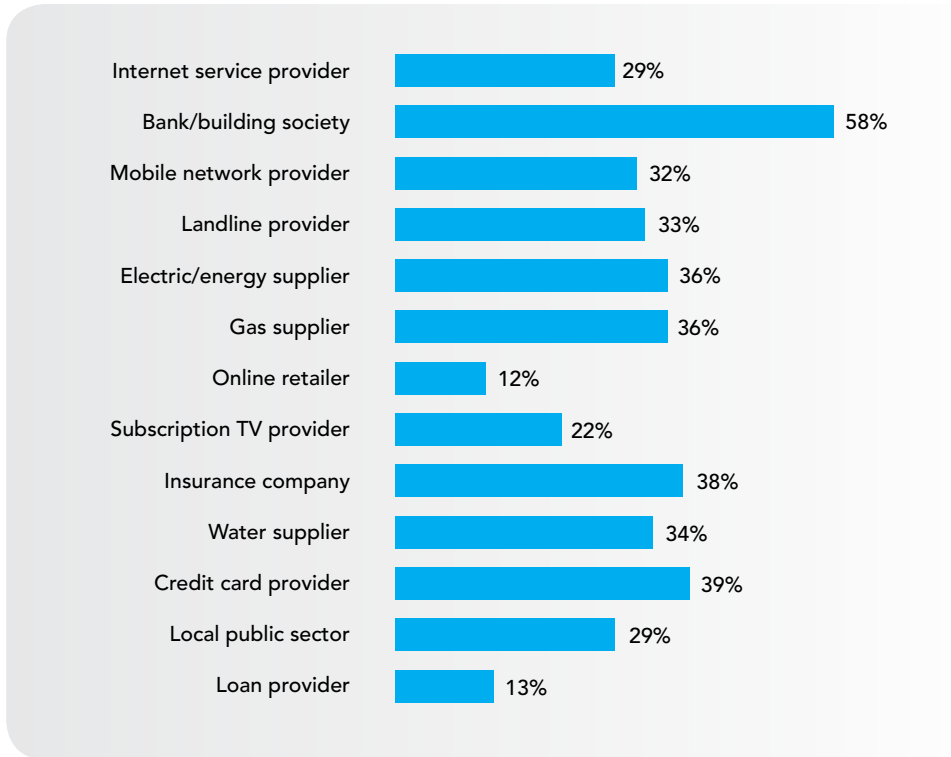
When asked specifically about which type of organisations consumers would not use social media to contact, the top answer, of 58 per cent, is their bank or building society. Though more young consumers would be willing to do this, it again demonstrates that financial matters are so private in nature that they do not naturally lend themselves to social media interaction. As security technology develops, perhaps in the future this will be an easier and more confident step to take for consumers. For the meantime, the 'one-to-many' model of social media makes it difficult to discuss sensitive matters on a public level.

In fact, consumers would not use social media to contact 5 certain types of organisation due to concerns over security and privacy. For 8 of the organisation types, consumers avoided social media because they believed that other methods get a better response. There is clearly an inherent distrust and nervousness about social media as a solid tool to get customer issues resolved.

**FACT!** A population of 63 million people aged over 16 in UK<sup>4</sup>, there are around 3.4million people with at least one unresolved complaint

<sup>4</sup> <http://www.ons.gov.uk/ons/rel/census/2011-census/population-and-household-estimates-for-england-and-wales/stb-e-w.html>

**Fig.18 Which of the following types of organisation would you not use social media to contact?** (Base: 196 consumers who would only use social media to interact with certain types of organisation)



**FACT!** Of the 216 consumers that made a complaint in the past year, 25% never saw a resolution, and 38% were unsatisfied with the resolution they did eventually get

**Fig.19 Why would you not use social media to contact all of these types of organisation?**  
 (Base: 196 consumers who would only use social media to contact certain types of organisation)

Total: Reasons for not using social media to contact these organisations...							
Organisation	Security/privacy concerns	No social media account	Don't expect reply	Prefer post or e-mail	Visibility on profile page	Other	Base
Landline provider	52%	11%	22%	41%	34%	0%	64
Mobile network provider	29%	27%	29%	39%	27%	0%	62
Internet service provider	37%	16%	32%	39%	32%	0%	57
Subscription television provider	43%	23%	27%	39%	32%	0%	44
Gas supplier	41%	20%	27%	47%	33%	0%	70
Electric/energy supplier	41%	18%	21%	48%	35%	0%	71
Water supplier	44%	13%	22%	58%	42%	0%	67
Local public sector	50%	19%	21%	54%	35%	0%	57
Bank/building society	68%	11%	11%	39%	34%	2%	114
Insurance company	61%	13%	19%	41%	39%	1%	75
Credit card provider	64%	10%	8%	44%	36%	1%	77
Loan provider	46%	8%	8%	50%	35%	0%	26
Online retailer	43%	30%	35%	48%	35%	4%	23

Echoing back to the 2013 Aspect social media research, if organisations believe that social media has the power to become the communication method of choice over the telephone, they clearly have some way to go to ensure that it is tightly integrated into the customer service function. By bringing social media into the contact centre, and rolling out a strategy that combines all communications channels together for a single view, only then with organisations firmly embed social media into their customer engagement. There is no doubt that social media is changing the customer conversation, but in 2013, this study has demonstrated that we are still in the early stages.

**FACT!** 8.1% of all 1,000 consumers surveyed were dissatisfied or very dissatisfied with the resolution they got

## Conclusion

Aspect's first study into the current opinions and views of UK consumers has painted a complex picture. However, some key themes and trends may be deduced.

What this study has proved is that the modern family of 'Nuclear Consumers' is not clear cut. Each demographic has varying levels of expectations, satisfaction with services, perception of providers as individual industries and choices, when it comes to interacting with the organisations that they buy from.

The key conclusions to draw from this study are:

### 1. Consumers find it easier to recall a good customer experience, than a bad one. Good customer experiences can almost always be put down to the 'human' element.

Half as many consumers in this study remembered a good customer service experience as they did a bad one. This could indicate that people better remember when they are pleased with an organisation's ability to deal with a query, because they are used to customer service being of an acceptable level. People are still experiencing roadblocks with organisations that can have dire consequences for the bottom line and customer confidence.

It is important to keep in mind that whether or not an organisation provides 'good' customer service is a matter of perception and subjectivity. Where one consumer believes that having a great experience with an organisation is as simple as getting an issue resolved quickly and efficiently, the other expects far more than they are paying for. There is also the question of whether a 'good' experience leaves a positive footprint in the mind of the consumer, or whether expectations are so high that being 'satisfied' should be par for the course.

### 2. Bad customer experiences and complaints are caused by inefficient contact centre processes.

The consequences of a 'bad' experience are fundamentally more damaging to an organisation than the positives of a good one.

Being able to resolve queries in an acceptable period of time (usually on first interaction) is a key consideration, and can be resolved easily. Through investment in appropriate contact centre technology, careful capacity planning, more effective use of workforce management tools and remote agents, organisations can ensure that customer queries are resolved speedily, rather than convolutedly.

Something as simple as 'doing what you say you'll do' will eradicate 1 in 5 'bad' customer experiences. It is perhaps surprising to discover that only a small minority of complaints are actually triggered by anything other than customer service itself.

**FACT!** When airing their frustration with an organisation via social media, males are 40% more likely than females to get a response (70% versus 51%)

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### 3. Consumers can and will switch providers, solely because their customer service experience is 'bad'.

In the main, people prefer a quick resolution to over-servicing, and again this can be achieved by evaluating the current processes in the contact centre (and the back office for many of these types of organisation). If things aren't put right, consumers can – and will – switch provider, even after one incidence of bad customer service.

The ease of switching many different types of provider (water and local public sector less so) is aggregating. The markets are competitive, and therefore organisations need to work harder at making great customer experiences a priority.

### 4. Organisations and the customer mind-set still have a long way to go before social media becomes a staple channel for customer engagement, and more so in some sectors than others.

The customer conversation is changing, and this is being driven by the expectation (particularly of younger consumers) to be able to communicate with organisations in a multitude of ways. Social media is not the preferred method of contact yet, but it is still part of a multi-channel strategy that should be immersed fully into customer engagement processes.

Social media, as well as other forms of electronic communication, gives consumers the freedom to control the conversation, and carry on with their busy lives. Connecting with organisations should cause the customer to extend as little effort as possible.

### 5. Younger consumers expect more from the organisations that they deal with, and the results rarely meet those expectations.

We know that the population is aging. But it is the next generation of consumer, the modern family of 'Nuclear Consumers' that is controlling customer engagement. These are the consumers that are more likely to expect an organisation to go 'over and above' to resolve a complaint. They are least likely to be satisfied with the service that they receive (compared to their older peers). They are more likely to switch providers due to a bad customer experience. They are also more likely to want to use more channels such as social media in order to get the resolution that they want.

The pressure is on for organisations to satisfy a whole new generation of consumer. In the main, the results are on the positive side, but there is still an alarmingly large proportion of the UK that is very unhappy with their providers.

**FACT!** Over 55s will rarely – if ever – use social media (no-one in this study!) to contact an organisation, preferring the telephone (59%) by far

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## About Aspect

Aspect builds customer-company relationships through a combination of contact management, workforce optimisation and Microsoft® unified communications and collaboration platform solutions, enabling organisations to meet the expectations of today's social consumer by bringing customer contact to every enterprise function.

Aspect is recognised by industry analysts for its success in helping companies of all sizes, including nearly two-thirds of the Global Fortune 100, achieve strategic objectives, deliver operational efficiency and enhance customer satisfaction through the power of time-tested software and professional services. For more information, visit [www.aspect.com/uk](http://www.aspect.com/uk).



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### Corporate HQ East

300 Apollo Drive  
Chelmsford, MA 01824  
978 250 7900 office  
978 244 7410 fax

### Corporate HQ West

2325 E. Camelback Road  
Suite 700  
Phoenix, AZ 85016  
602 282 1500 office  
602 956 2294 fax

### Europe & Africa HQ

2 The Square  
Stockley Park, Uxbridge  
Middlesex UB11 1AD  
+(44) 20 8589 1000 office  
+(44) 20 8589 1001 fax

### Asia Pacific & Middle East HQ

138 Robinson Road  
#13-00 The Corporate Office  
Singapore 068906  
+(65) 6590 0388 office  
+(65) 6324 1003 fax

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