



Foreword

Joanna Causon Chief Executive

This has been the most unusual and challenging year for customer service since the UKCSI began in 2008. Hopefully and mercifully, the threat to life and physical well-being created by Covid-19 appears to have been significantly reduced - in the UK at least – by the vaccination programme and lockdown. But the Covid-19 crisis is not over: the longer-term societal and economic impacts are not yet fully apparent and will shape the customer experience landscape in the months and years ahead. For organisations, this is a critical time to take stock of lessons learned during the pandemic and to redefine future priorities, linking everything we do back to purpose, relevance and the long-term impact or legacy we seek to create.

This UKCSI shows a welcome, if modest, improvement in overall customer satisfaction. However, a note of caution: much of the improvement can be attributed to better complaint handling and service recovery. Indeed, satisfaction with complaint handling is at its highest ever level, even though record numbers of customers have experienced a problem with an organisation. What this demonstrates all too clearly is that we have got better at dealing with issues but not necessarily better at preventing them impacting customers in the first place. For the UK economy to move forward as a leader in customer service, we need a broader focus on all dimensions of customer satisfaction.

For the first time since 2017, more organisations have improved rather than declined year on year by at least 2 points on the customer satisfaction index. The Covid-19 crisis has exposed differences in organisations' ability to adapt and innovate. Many trusted and established brands and organisations appear to have maintained or improved their service performance.

Customer attitudes, behaviours and preferences have evolved in the past year and will develop and fragment further as the social and economic consequences of the pandemic unfold. For the first time, at least half of the customer experiences recorded in this UKCSI took place through digital channels, underlining the importance of an omnichannel strategy that blends the best elements of technology and human interaction.

Customers have appreciated improvements or innovation in service such as better scheduling to avoid queuing, proactive communications and dialogue, support with mental, physical or financial well-being, advice and knowledge to help navigate challenging situations and life events. However, almost a quarter of customers believe that some organisations have used Covid-19 as an excuse for poor service. More customers have made online purchases or chosen to buy from local or ethical suppliers, and the number of customers who are willing to pay more for excellent service has grown to 32%.

These trends serve to underline concerns over polarisation in our society between those that demand and can afford to pay for better service, and those that cannot.

In the coming months, the signs for economic recovery are positive but growth is likely to be uneven across sectors and regions. We will, I believe, see skills shortages alongside growing unemployment, changes in employment opportunities, and a rise in business failures alongside expansion of productive organisations, as government economic support is pared back.

In this UKCSI, we have sought to examine changes in customer experience over the past year and bring out the key learnings for organisations. From my perspective, three areas of focus stand out. Firstly, organisations need to be realistic and clear about their core proposition, who they serve and the sustainable impact they seek to achieve. Secondly, Covid-19 has heightened the importance of flexibility, adaptability and innovation. Organisations need to learn from the enforced changes of Covid-19, retain the benefits and develop the mindset and capabilities to enable ongoing innovation.

Finally, organisations need to engage proactively with their customers. Many of the organisations that have maintained high levels of customer satisfaction have deliberately increased the level of their customer engagement, providing timely and relevant communications that demonstrate a genuine care for customers' well-being.

The experiences of the past year have strengthened our understanding of the contribution of customer service to well-being, quality of life, trust in organisations, and business performance. I believe that a sustained focus on customer experience will be vital for the health and prosperity of organisations, their customers and employees, and our economy. I hope that you find this report valuable and I look forward to working with organisations and stakeholders across sectors to champion the service agenda.



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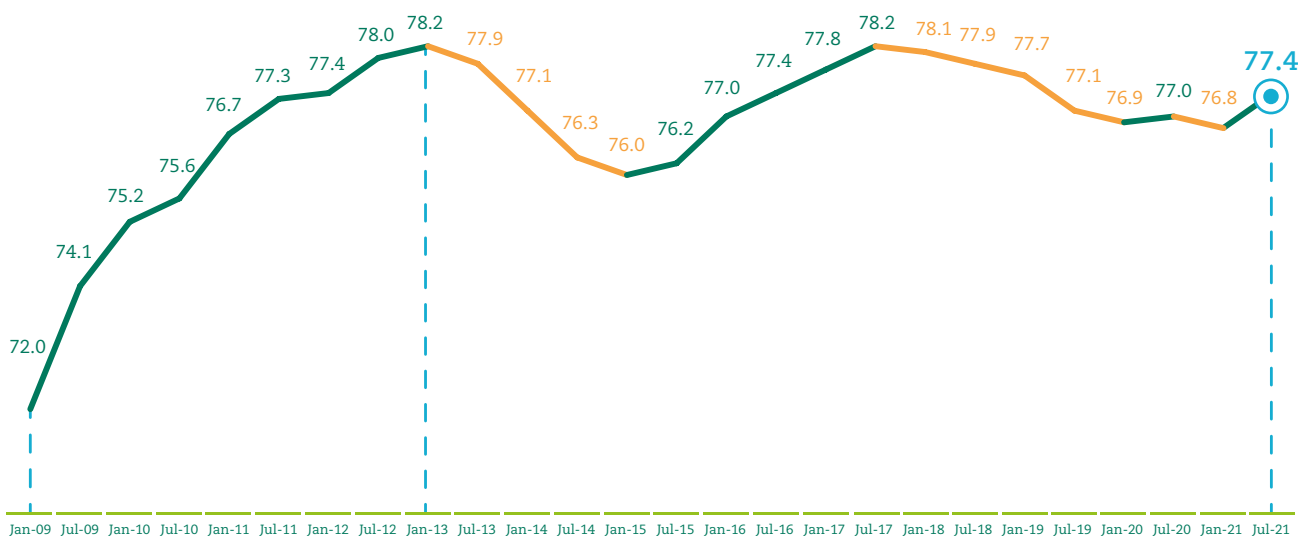
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Executive Summary

The state of customer satisfaction in the UK

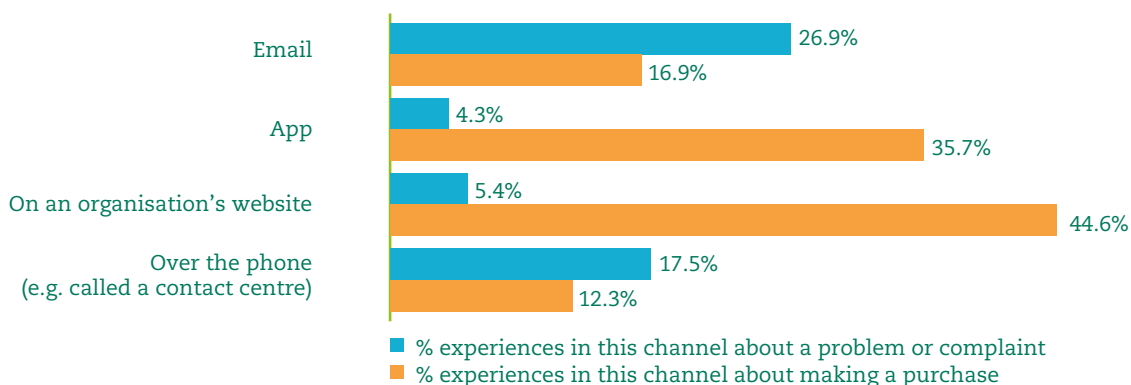
The UK Customer Satisfaction Index (UKCSI) is 77.4 (out of 100), 0.4 points higher than in July 2020 and 0.6 points above the January 2021 UKCSI.

14.9% of customers experienced a problem with an organisation, the highest rate since 2009 but satisfaction with complaint handling is at its highest ever level.



For the first time, 50% of the customer experiences recorded in the UKCSI were digital (on an organisation’s website or via email, web chat, text or social media).

Differences in customer satisfaction in each channel are partly influenced by types of customer experience. A relatively high proportion of in person, website or app experiences involve making a purchase, an experience which typically results in higher than average satisfaction. By contrast, a relatively high proportion of email, web chat, social media, text, in writing (letter) and over the phone experiences are about problems or complaints, which tend to attract lower than average levels of customer satisfaction.



The Public Services (National) and Retail (Non-food) sectors have improved by 1.2 points and Telecommunications and Media by 1 point, compared to July 2020. Average customer satisfaction in the Public Services (Local) sector fell by 1.6 points. The other nine UKCSI sectors have moved by less than 1 point compared to July 2020.

3 sectors up by at least one point since July 2020

1 sector down by at least one point since July 2020

Public Services (National)

Public Services (Local)

Retail (Non-food)

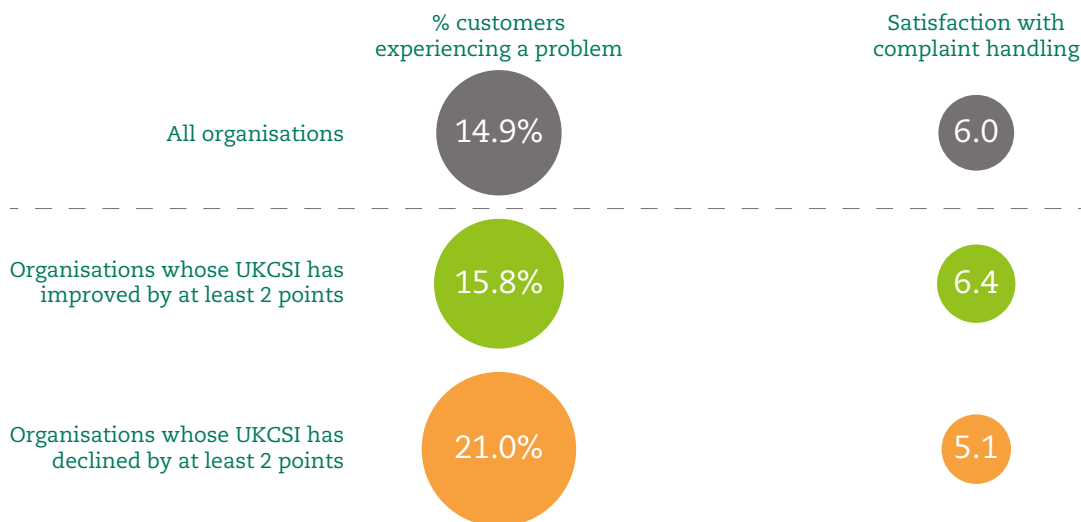
Telecommunications & Media

70↑
Organisations have improved

39↓
Organisations have experienced a yoy drop

272 organisations and organisation types are included in this UKCSI. For the first time since July 2017, more organisations (70) have improved than declined (39) year on year by at least 2 points.

Organisations with a UKCSI score at least 2 points higher than a year ago have generated fewer problems for customers and have better satisfaction with complaint handling satisfaction.



first direct, John Lewis and amazon.co.uk are the highest rated organisations. They are the only organisations who were also rated amongst the top 10 in July 2020.

Jul-21 Rank	Organisation	Sector	Jul-21 Score	Jul-20 Score	Jul-20 Rank	Change in score Jul-20 to Jul-21
1	first direct	Banks & Building Societies	86.6	84.2	3	2.4
2	John Lewis	Retail (Non-food)	84.4	85.3	1	-0.9
3=	Amazon.co.uk	Retail (Non-food)	84.0	83.3	6	0.7
3=	Suzuki	Automotive	84.0	78.9	79	5.1
5=	Swinton	Insurance	83.9	74.9	186	9.0
5=	Tesco Mobile	Telecommunications & Media	83.9	82.8	12	1.1
7=	Home Bargains	Retail (Non-food)	83.8	81.0	27	2.8
7=	SAGA Insurance	Insurance	83.8	81.2	24	2.6
9=	Greggs	Leisure	83.5	82.1	17	1.4
9=	Jet2holidays.com	Tourism	83.5	80.2	45	3.3
9=	Scottish Water	Utilities	83.5	77.3	128	6.2
9=	Specsavers	Retail (Non-food)	83.5	81.2	24	2.3

▲ Increase in UKCSI score of less than one point ▼ Fall in UKCSI score ▲ Increase in UKCSI score of one point or more

Looking across the UKCSI as a whole, Deliveroo, Just Eat and Screwfix Direct have received a UKCSI score for the first time.

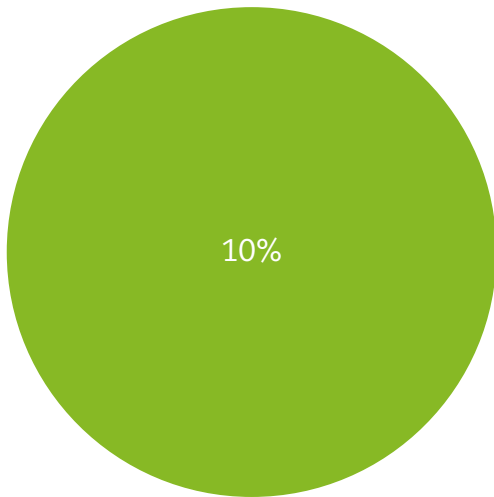
Customer satisfaction and business performance, loyalty and reputation

All of the food retailers that appear in both the UKCSI and Kantar's market research*, except for Co-op Food, grew their sales in the 12 weeks to 18 April 2021, compared to the same period in the previous year.

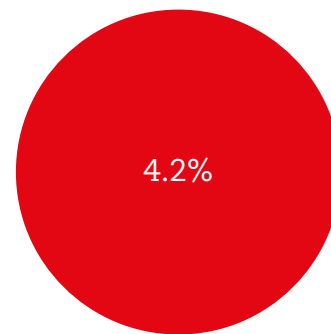


Retail (Food) organisations recording a relatively high proportion of website customer experiences in the UKCSI, generated an average sales growth of 10%, compared to 4.2% for those with a lower than average proportion of customers using their website.

Average sales growth of Retail (Food) organisations with higher than sector average proportion of website customer experiences



Average sales growth of Retail (Food) organisations with lower than sector average proportion of website customer experiences



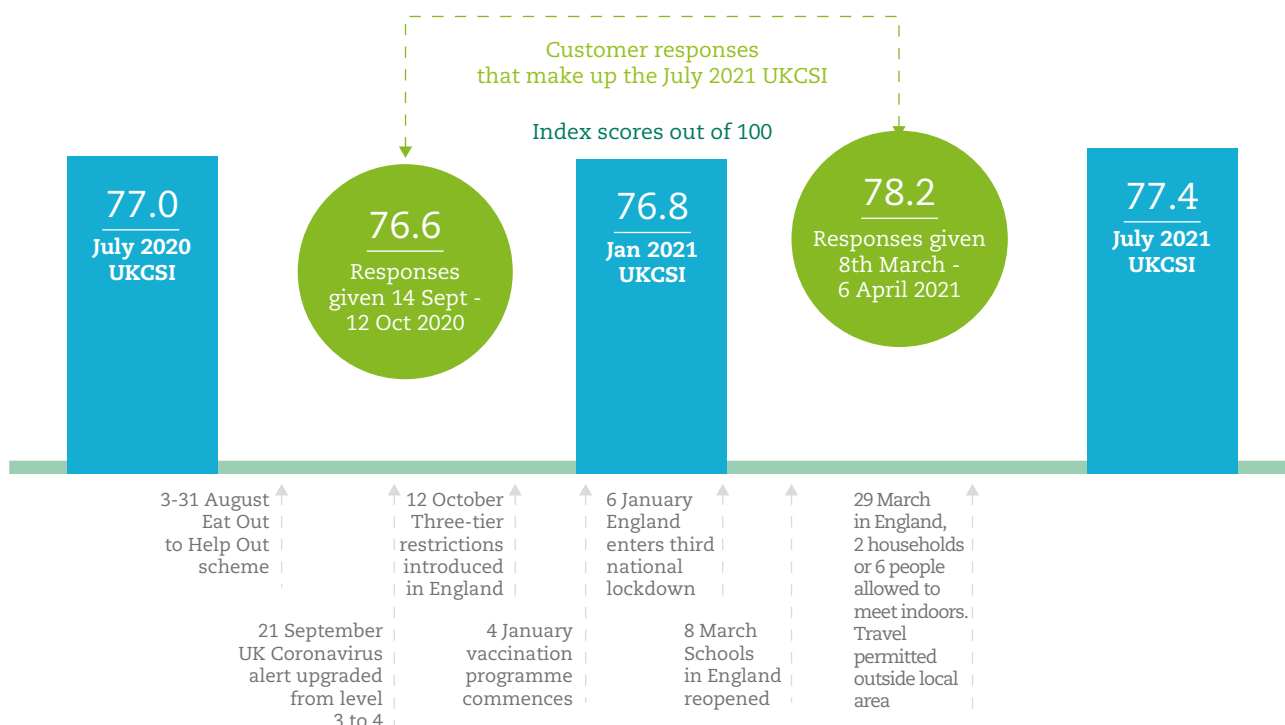
* Kantar World Panel market share data for 12 weeks ending 18 April 2021

Across the average of all organisations in the UKCSI, achieving a 9 or 10 (out of 10) for customer satisfaction has a much stronger effect even than an 8 out of 10 in generating the highest levels of trust, recommendation, loyalty and reputation.



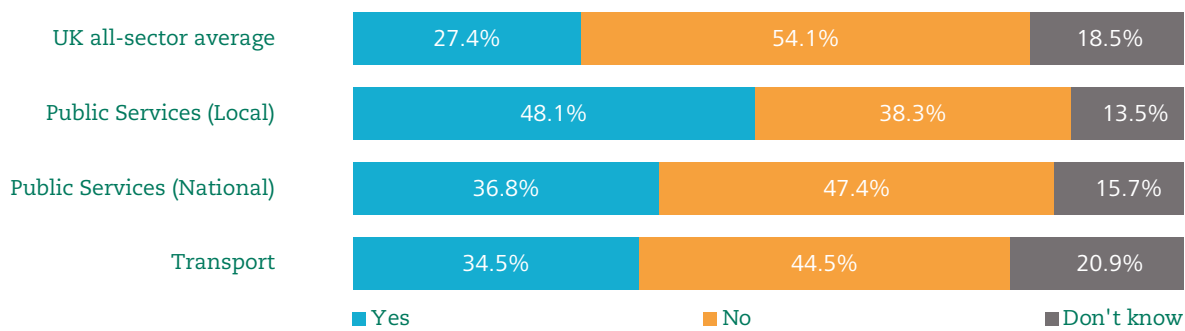
Customer experience during the Covid-19 crisis

Overall customer satisfaction was higher for experiences recorded in spring 2021 than for those in autumn 2020. The biggest improvement between autumn 2020 and spring 2021 was in the Transport and Tourism sectors.



27% of customers have experienced a change in customer service during the Covid-19 pandemic. Customers were most likely to say there has been a change in the customer service they experienced in the Public Services (Local and National) and Transport sectors.

Do you think there has been a change in the customer service you get from xx because of Covid-19?



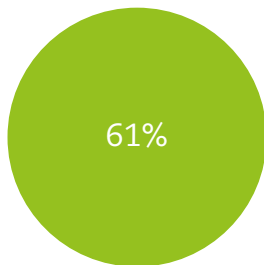
Customers who have experienced a positive change in service during Covid-19 are slightly more satisfied than those who have seen no change. But customers who have experienced a negative change in service are much less satisfied than other customers.



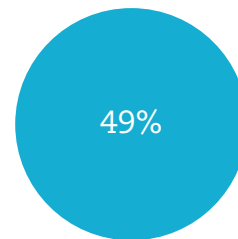
The main positive changes in customer experience during the pandemic are better scheduling of appointments, support to improve well-being, and proactive communication by organisations.



% customers who said the improvement in service they experienced made them feel more positive about the organisation



% customers who said the improvement in service they experienced made them more likely to use an organisation in future

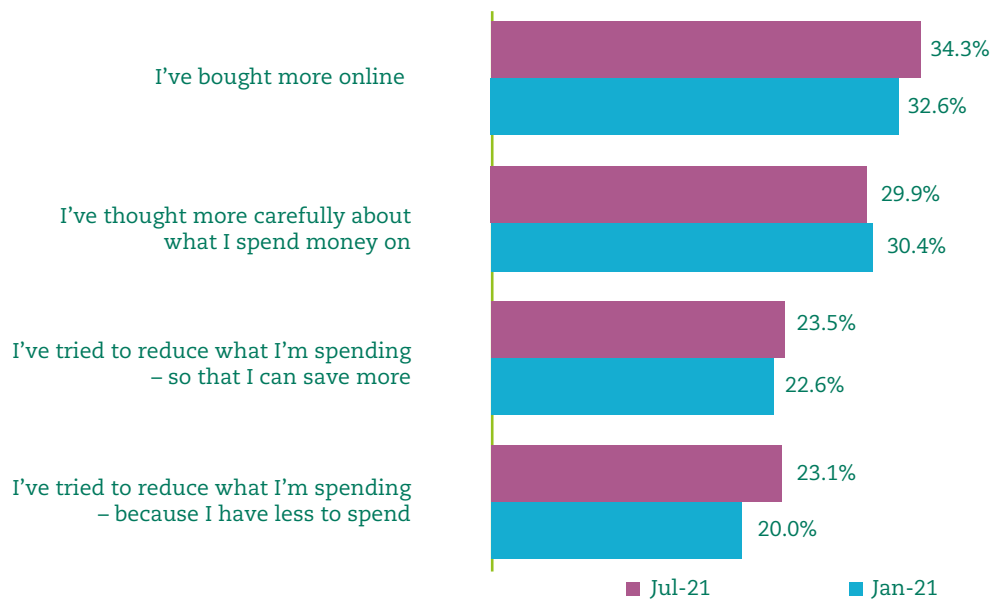


Making it easier to contact the right person to help, website navigation, more helpful, knowledgeable staff are the top issues customers want organisations to improve.

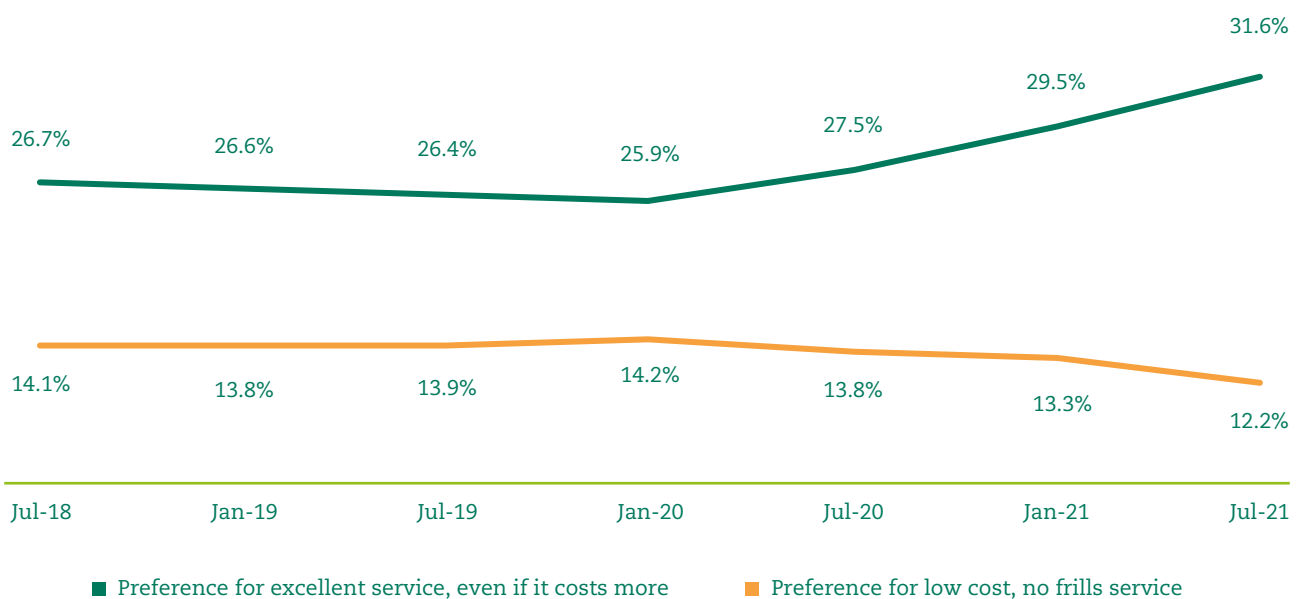


Changing behaviours and preferences

Over 30% of customers have made more online purchases in the last 6 months. More than 20% have reduced and thought more carefully about what they spend.



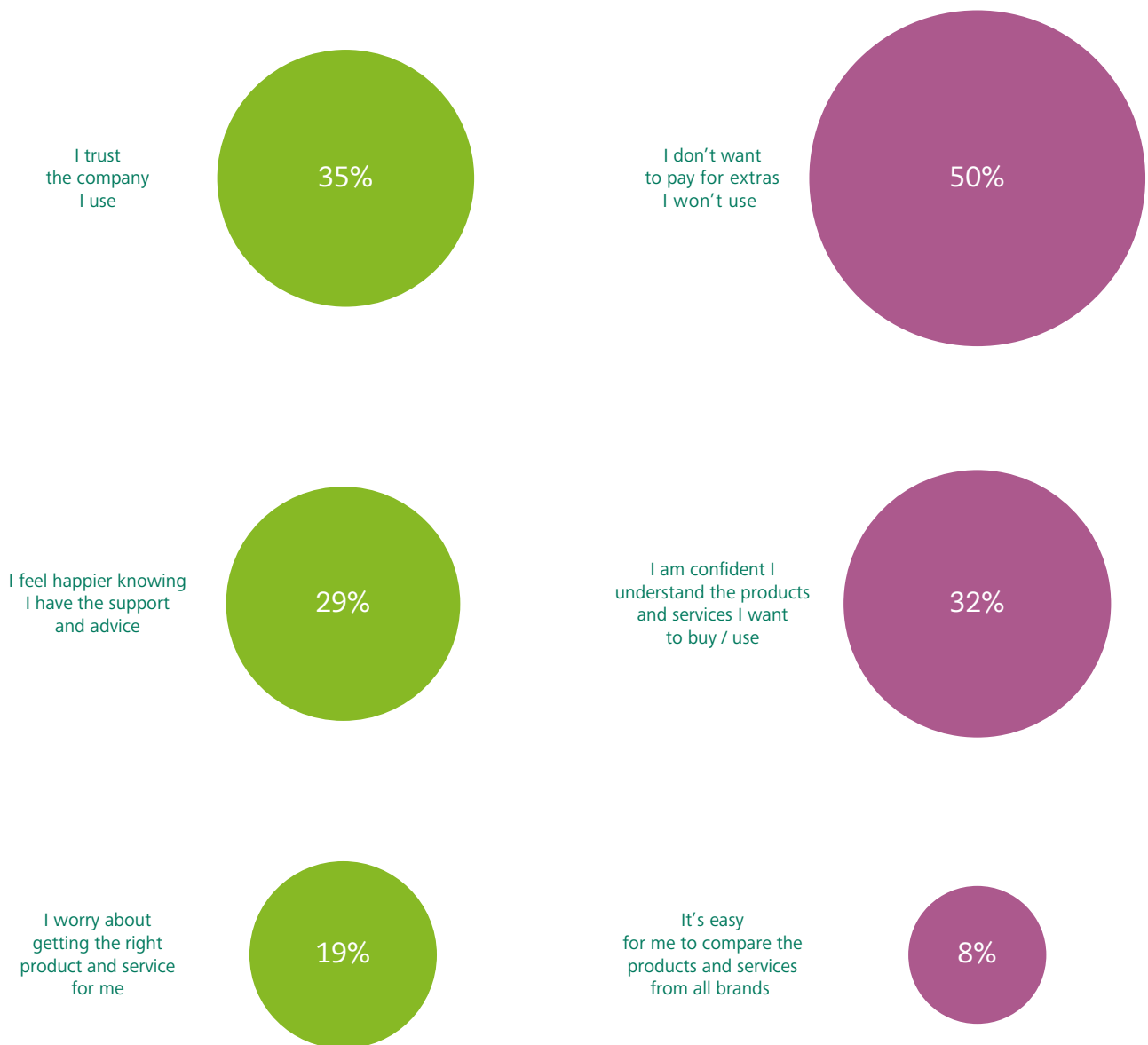
The number of customers who prefer to pay more for excellent service, even if it costs more, has increased in the last year.



Customers who prefer to pay more for excellent service are the most likely to spend more with companies they trust and with local, independent or ethical companies.

Reasons for preferring excellent service, even if it costs more

Reasons for preferring no frills, lowest cost service



Key learnings and recommendations for organisations

We conclude our review of the state of customer satisfaction in the UK by reflecting on key lessons for organisations from the Covid-19 pandemic and implications for customer experience.



1 In the context of Covid-19, organisational purpose is even more critical to success



2 Combining the best of digital and human interactions to design experiences around customer needs



3 Developing a blend of digital, interpersonal, applications development and customer experience skills



4 Complaint handling is essential to reduce customer dissatisfaction but is not enough to drive further improvements in satisfaction and engagement



5 Environmental and social impact are increasingly relevant to an organisation's customer proposition



6 Proactive communication and engagement to maintain and develop trust



7 Developing flexibility and innovation to respond to change and create new opportunities



8 Customer satisfaction and employee engagement have become important measures of corporate governance



9 A long-term focus on customer service to enable sustained business performance



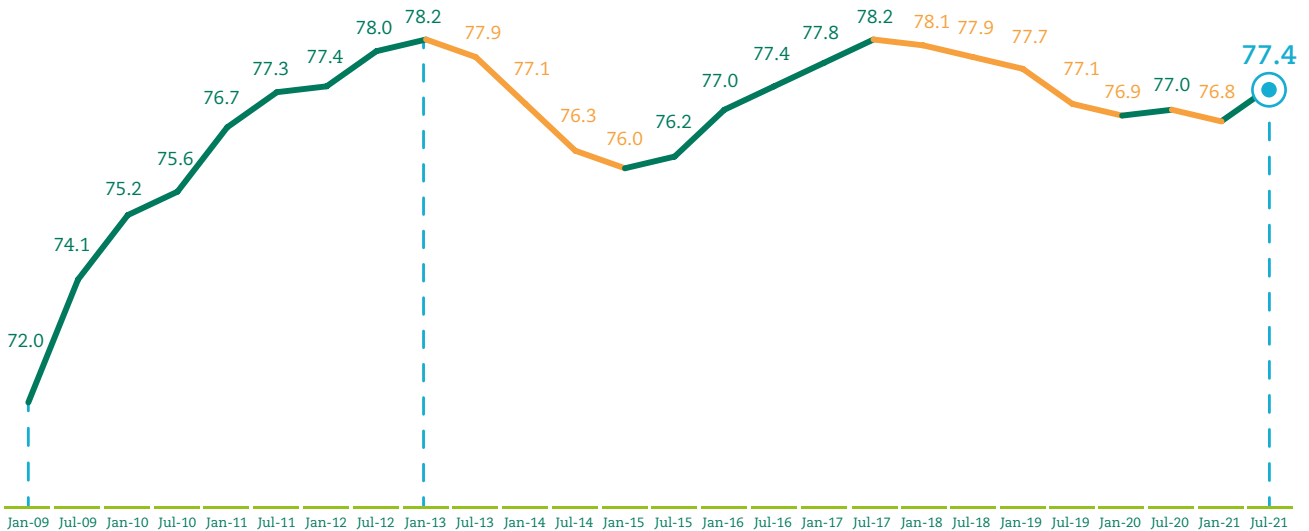
10 Learning the lessons from Covid-19 to prepare better for future shocks

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The state of
customer
satisfaction
in the UK

July 2021 is
the highest UKCSI score
since January 2019,
when it was 77.7

The UK Customer Satisfaction Index (UKCSI) is 77.4 (out of 100), 0.4 points higher than in July 2020 and 0.6 points above the January 2021 UKCSI



The UKCSI is based on 26 measures which are categorised in 5 dimensions of customer satisfaction. Satisfaction in each dimension is slightly higher than a year ago, with the largest increase for the Complaint Handling dimension, up 1.4 points to 60.2 (out of 100).

	Dimension (score out of 100)	Jul 21	Jul 20	Year-on-year change
	Experience Measures the quality of customers' experiences and interactions with organisations	78.3	78.0	0.3
	Complaint Handling How organisations respond and deal with problems and complaints	60.2	58.8	1.4
	Customer Ethos Extent to which customers perceive that organisations genuinely care about customers and build the experience around their customers' needs	76.8	76.5	0.3
	Emotional Connection The extent to which an organisation engenders feelings of trust and reassurance	76.7	76.2	0.5
	Ethics Reputation, openness and transparency and the extent to which an organisation is deemed to "do the right thing"	75.8	75.2	0.6

14.9% of customers experienced a problem with an organisation, the highest rate since 2009, but satisfaction with complaint handling is at its highest ever level

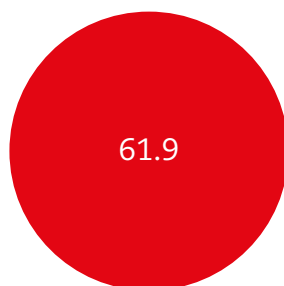
Despite the increase in the number of customers experiencing a problem with an organisation, all 4 complaint handling measures have registered their highest ever scores. Nevertheless, average satisfaction for customers who say they experienced a problem with an organisation is much lower than for those did not experience a problem.

Right first time and complaints measures Jan 2020 – July 2021

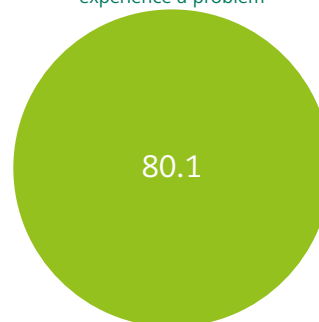
Sector	Jan-20	Jul-20	Jan-21	Jul-21
% experiences right first time	80.6%	81.0%	80.5%	79.8%
% of customers experiencing a problem	13.6%	14.1%	14.6%	14.9%
Satisfaction with outcome of the complaint	6.0	5.9	5.8	6.1
Satisfaction with complaint handling	5.8	5.8	5.7	6.0
Staff attitude (in context of a complaint)	6.1	6.2	6.0	6.3
Speed of resolving your complaint	5.8	5.8	5.6	5.9

Average UKCSI score

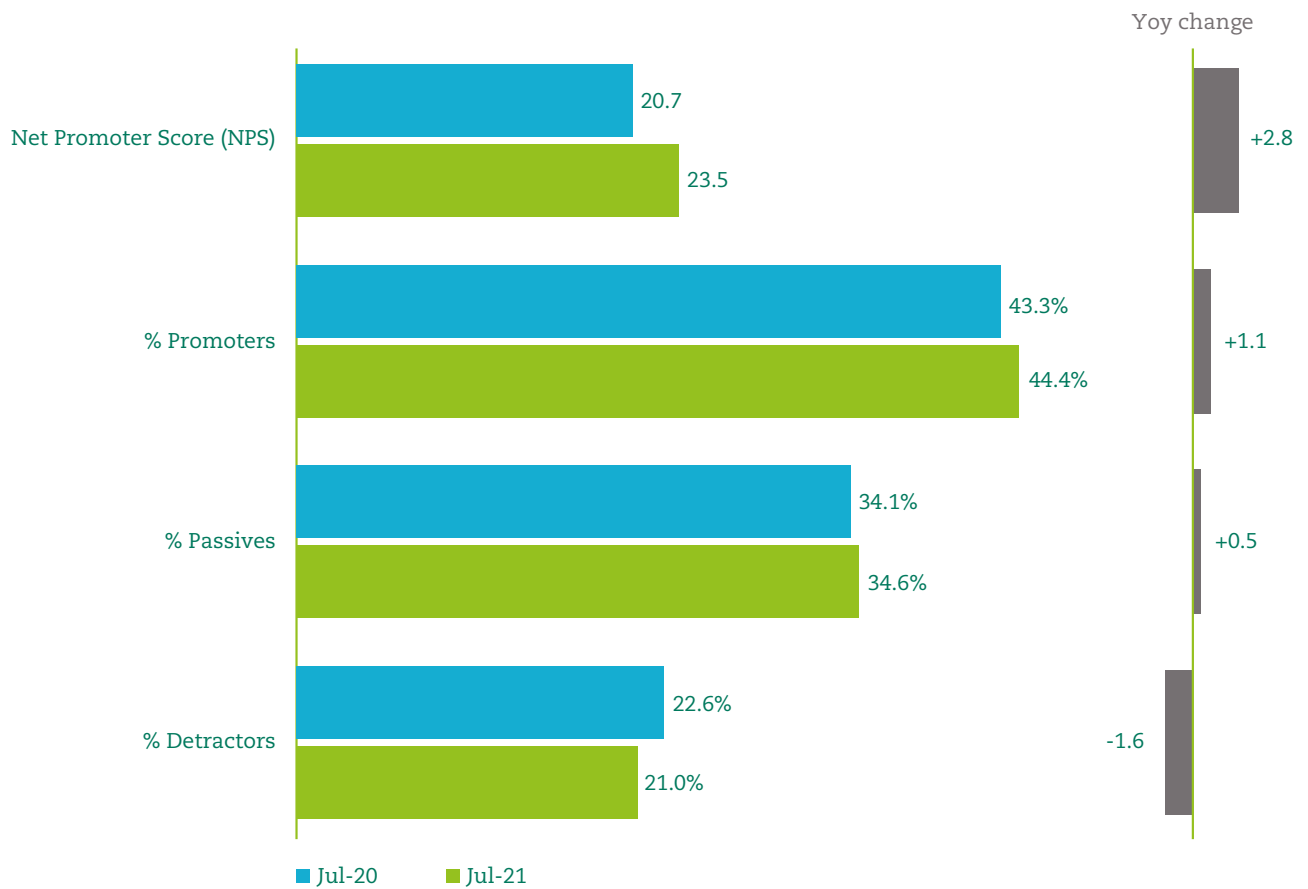
Customers who experienced a problem with an organisation



Customers who did not experience a problem

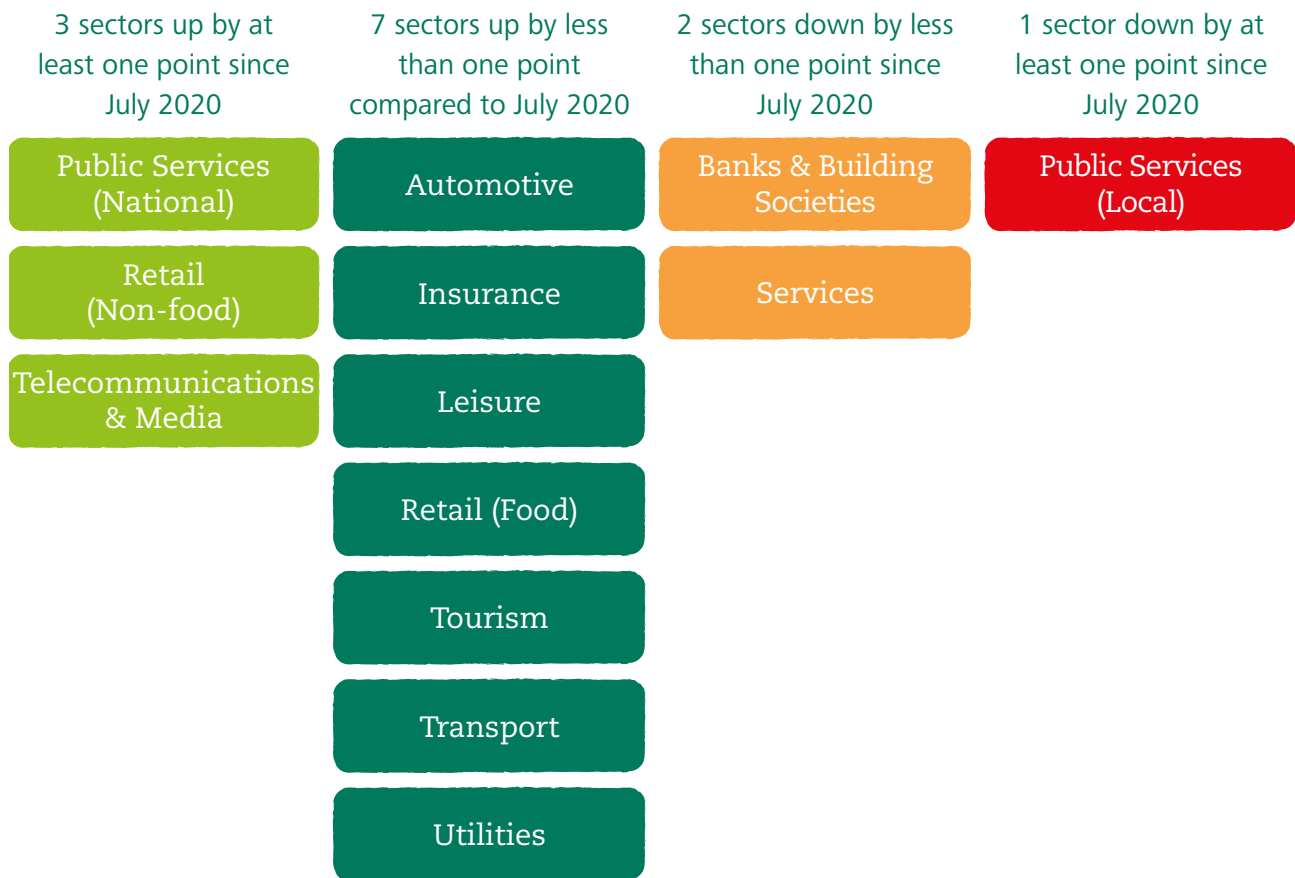


The average Net Promoter Score, 23.5, is 2.8 points above its July 2020 level and the highest ever recorded in the UKCSI, due to both a modest increase in the number of promoters and a decline in the number of detractors¹.

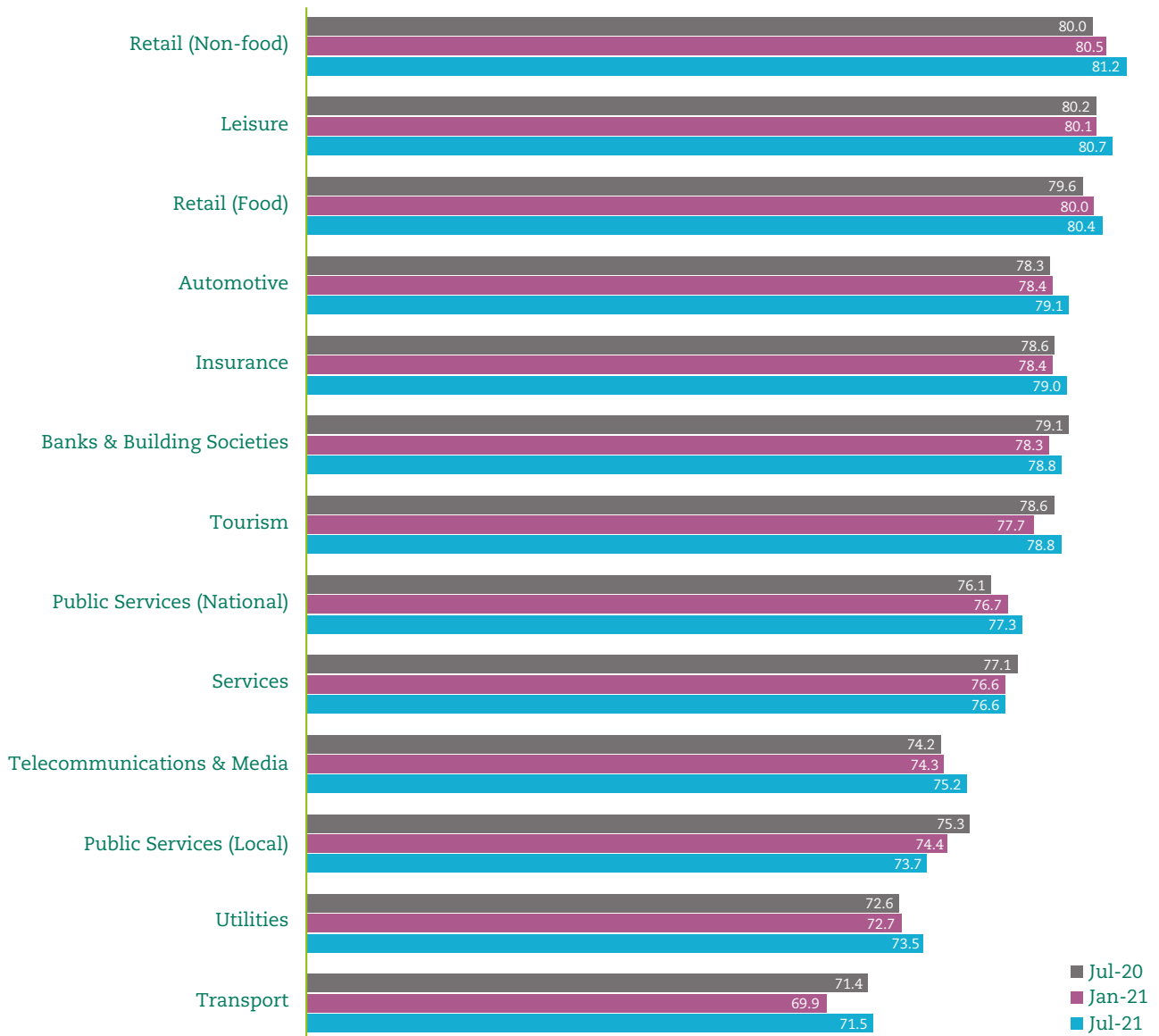


¹Net Promoter Score (NPS) is calculated by subtracting the % of respondents scoring 0 - 6 (out of 10) on likelihood to recommend from the % of respondents scoring 9 - 10. Promoters are those scoring 9 - 10. Passives score 7 - 8 and Detractors score 0 - 6.

The Public Services National, Retail (Non-food) and Telecommunications and Media sectors have each improved by at least 1 point, compared to July 2020. Average customer satisfaction in the Public Services (Local) sector fell by 1.6 points



Customer satisfaction by sector July 2020 – July 2021



The Retail (Non-food) sector has improved by 1.2 points to 81.2 and is the highest rated sector.

Public Services (National) has also risen by 1.2 points, to 77.3, its highest ever score.

The Telecommunications and Media sector is 1 point higher than a year ago and like Public Services (National) has registered its highest ever score.

The Public Services (Local) sector dropped by 1.6 points compared to July 2020, its lowest score since July 2015, when it was 72.9.

7 sectors – Automotive, Insurance, Leisure, Retail (Food), Tourism, Transport and Utilities – improved by less than 1 point compared to July 2020. Average customer satisfaction with Banks and Building Societies and Services organisations fell slightly, by 0.3 and 0.5 points respectively.

Within the Transport sector, average satisfaction for experiences with Rail and Coach / Bus companies improved by 2.4 and 1.3 points respectively. But average satisfaction with Airlines is 70.5, 3.8 points lower than in July 2020.

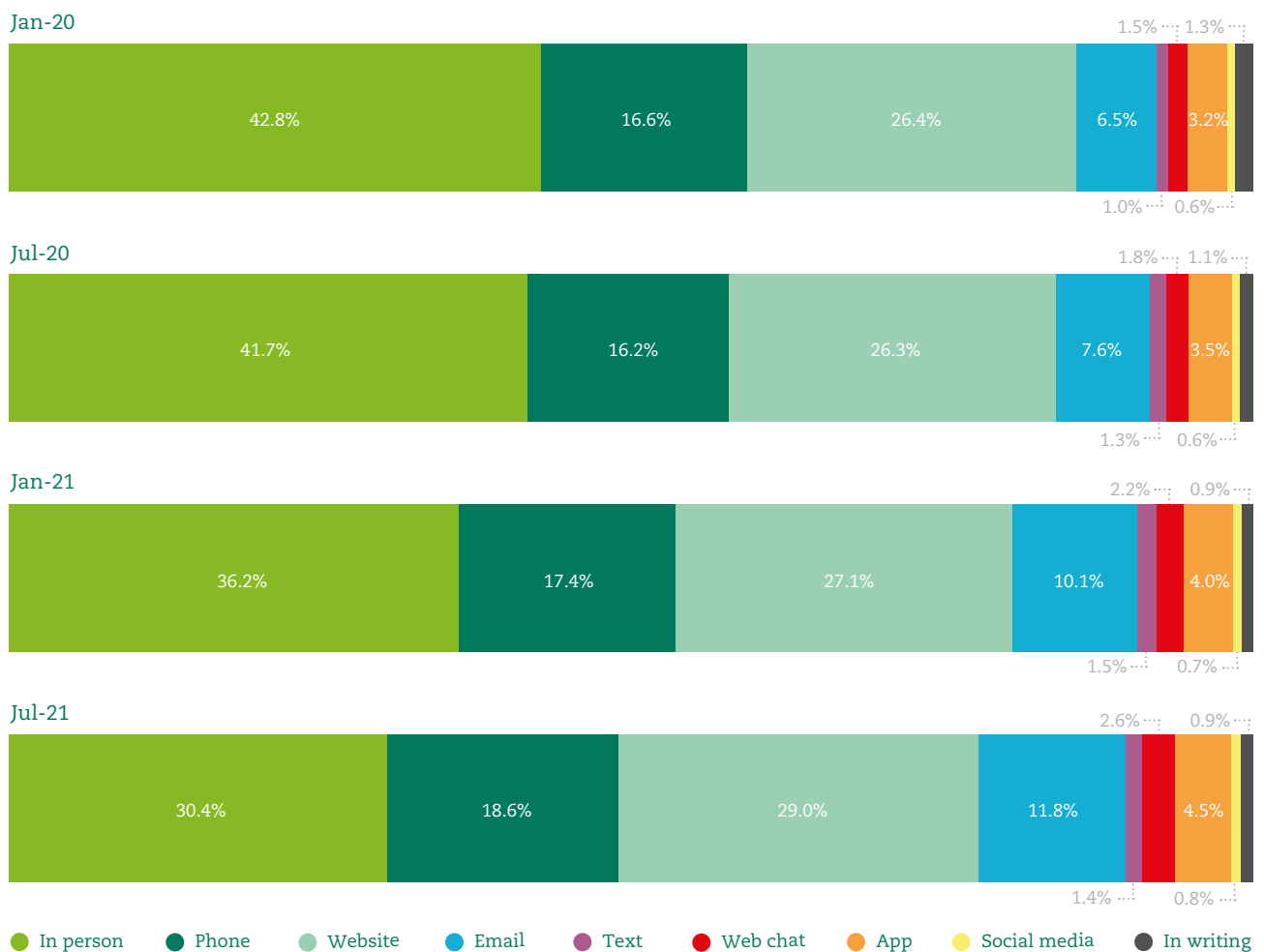
Customer satisfaction in the Transport sector



For the first time, 50% of the customer experiences recorded in the UKCSI were digital

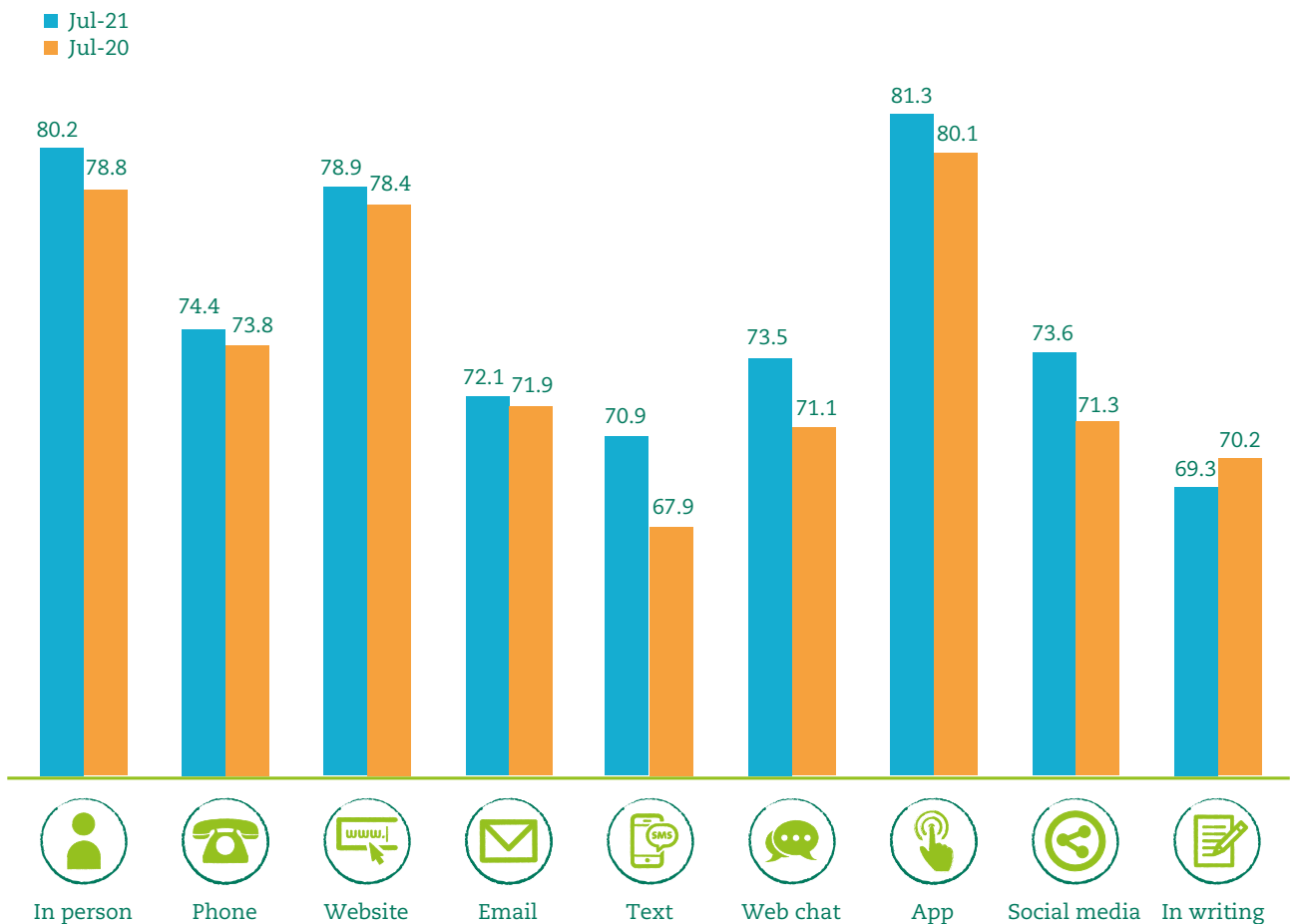
The July 2021 UKCSI shows further evidence of evolving channel use during the Covid-19 pandemic. The proportion of in person customer experiences (30.4%) is more than 10 percentage points lower than in July 2020. For the first time, 50% of customer experiences recorded in the UKCSI were conducted through digital channels (either on an organisation’s website or by email, app, web chat, text or social media).

Types of customer experience by channel



In general, customer satisfaction is higher than it was a year ago for experiences across all channels, except for in writing (letter) experiences, which is slightly (0.9 points) lower. However, both average levels of satisfaction and year on year changes in satisfaction for experiences in each channel vary considerably between sectors².

Average customer satisfaction for experiences in each channel

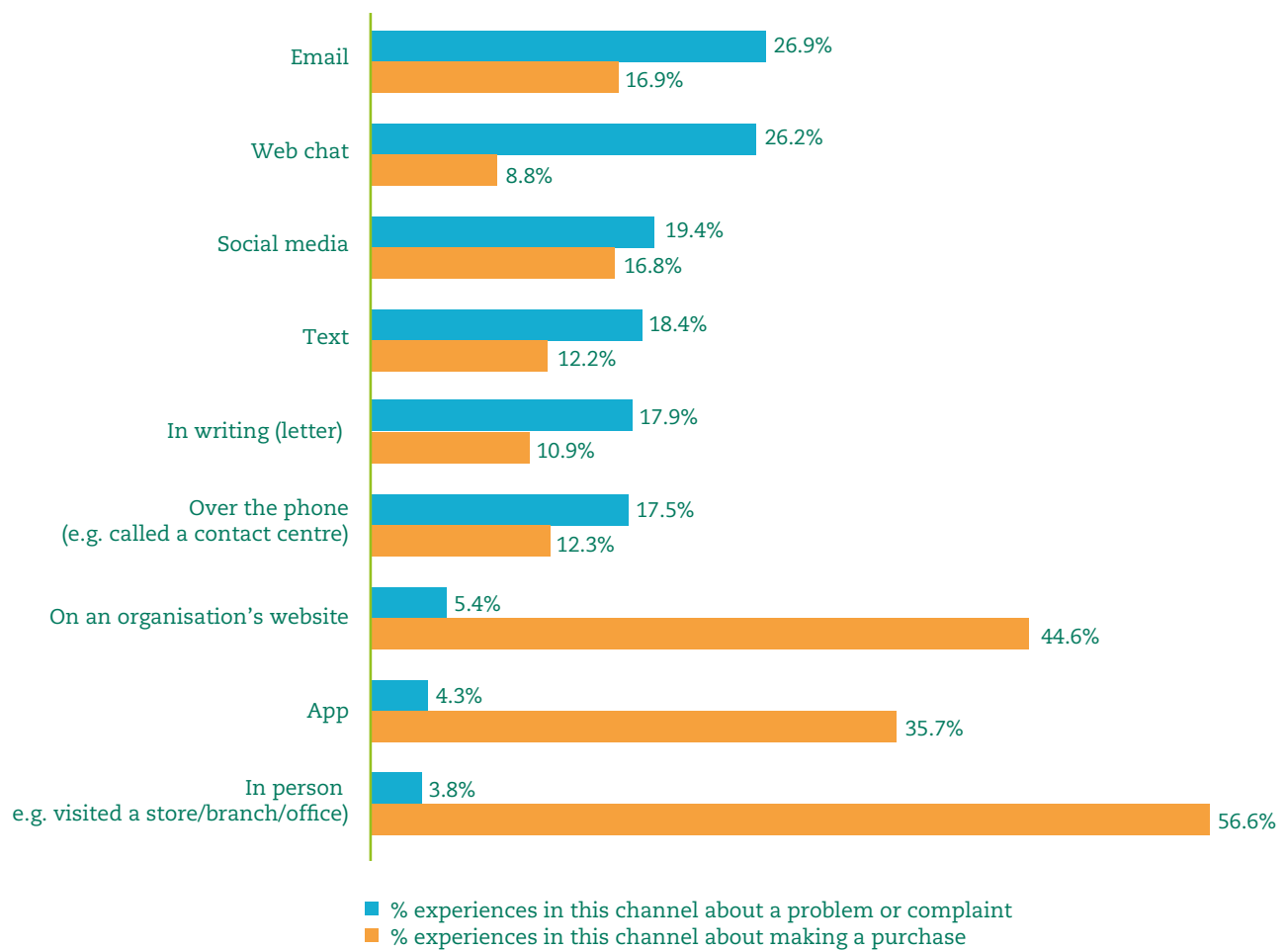


² See UKCSI sector reports for customer satisfaction scores for experiences by channel, available at www.instituteofcustomerservice.com/ukcsi

A relatively high proportion of email, web chat, social media, text, in writing (letter) and over the phone experiences are about problems or complaints

In person, website and app experiences tend to attract higher than average levels of customer satisfaction. However, this can in part be explained by the mix of types of contact that take place in each channel. A relatively high proportion of in person, website or app experiences involve making a purchase, an experience which typically results in higher than average satisfaction. By contrast, a relatively high proportion of email, web chat, social media, text, in writing (letter) and over the phone experiences are about problems or complaints, which tend to attract lower than average levels of customer satisfaction.

Frequency of types of experience, by channel

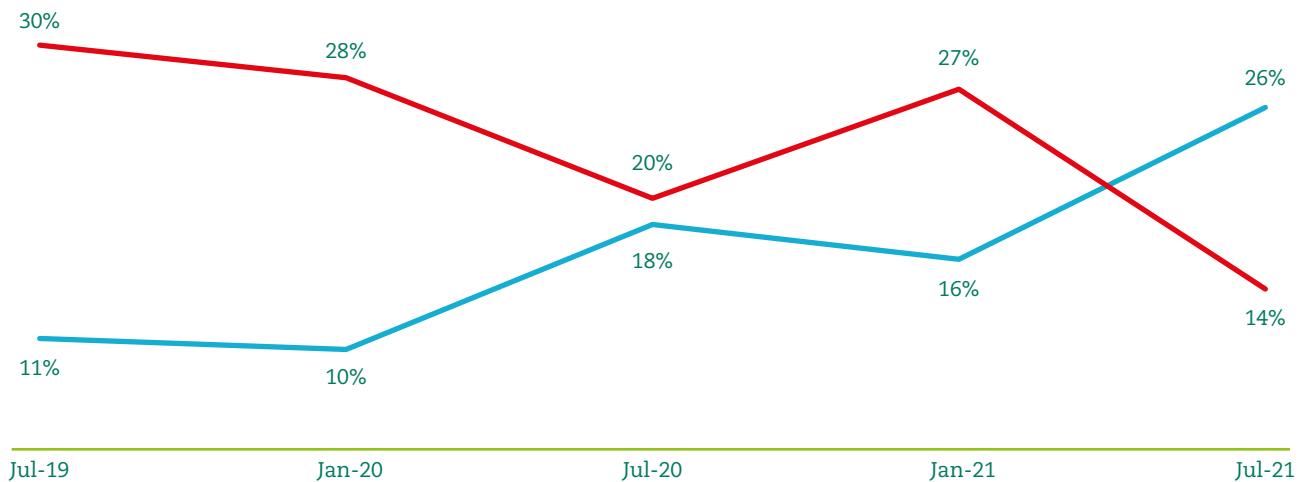


For the first time since July 2017, more organisations have improved than declined year on year by at least 2 points



% of organisations that have improved or declined by at least 2 points

- % organisations whose UKCSI score has improved yoy by at least two points
- % organisations whose UKCSI score has declined yoy by at least two points



In the Public Services (National), Telecommunications and Media, Transport and Banks and Building Societies sectors, at least 50% of the organisations in the UKCSI have moved by at least 2 points, compared to a year ago

Number of organisations in each sector whose customer satisfaction has improved or declined, compared, to July 2020

Sector	Total number of organisations	% organisations that have moved by 2 points or more	Number of organisations that have increased by 2 points or more	Number of organisations that have dropped by 2 points or more	Gap between highest and lowest organisation July 2021
Retail (Non-food)	24	29%	6	1	9.4
Leisure	21	14%	1	2	13.7
Retail (Food)	11	9%	1	0	5.5
Automotive	26	31%	5	3	10.8
Insurance	28	43%	6	6	12.0
Banks & Building Societies	20	50%	5	5	11.7
Tourism	23	48%	10	1	12.6
Public Services (National)	10	60%	5	1	10.4
Services	19	37%	3	4	17.9
Telecommunications & Media	13	62%	6	2	19.5
Public Services (Local)	7	43%	1	2	16.0
Utilities	34	38%	9	4	16.9
Transport	36	56%	12	8	26.9

In the Public Services (National) sector, half of the organisations that appear in the UKCSI received a customer satisfaction score at least 2 points higher than a year ago.

In the Tourism and Telecommunications and Media sectors, over 40% of the organisations featuring in the UKCSI have a score at least 2 points higher than in July 2020.

In the Banks and Building Societies sector 5 organisations rose by 2 points and 5 fell by 2 points. Similarly, in the Insurance sector, 6 organisations improved by at least 2 points but 6 dropped by the same amount.

In the Transport sector, 10 of the 12 organisations that have improved by 2 points or more are train operators. The 8 organisations whose UKCSI score fell by at least 2 points include both airlines and train operators.

Organisations with a UKCSI score at least 2 points higher than a year ago

- Higher satisfaction scores than a year ago on all measures, especially complaint handling
- More customers rated their experience as being right first time
- Fewer customers experienced a problem

Organisations with a UKCSI score at least 2 points lower than a year ago

- Lower satisfaction scores than a year ago across the range of measures including complaint handling, speed of service, ease of dealing with an organisation
- Fewer customers rated their experience as being right first time
- More customers experienced a problem with an organisation

This evidence reaffirms the need to focus on all dimensions of customer satisfaction, the critical importance of accessibility and ease of contact, complaint handling and the benefits of reducing the extent of problems experienced by customers.

Organisations that have improved or declined by at least 2 points: selected measures

	The 70 organisations that have improved by 2 points or more			The 39 organisations that have declined by 2 points or more		
	Jul-20	Jul-21	yoy change	Jul-20	Jul-21	yoy change
UKCSI	73.8	77.2	3.4	77.1	73.2	-3.9
Ease of dealing with XX	7.6	7.9	0.3	7.9	7.4	-0.5
XX makes it easy to contact the right person to help	7.3	7.6	0.3	7.5	7.1	-0.4
Ability to interact with XX in the way you prefer	7.7	7.9	0.2	7.9	7.5	-0.4
Speed of service / response	7.4	7.7	0.3	7.8	7.3	-0.5
XX makes you feel reassured	7.2	7.7	0.5	7.6	7.2	-0.4
Handling of the complaint	5.6	6.4	0.8	5.9	5.1	-0.8
% experiences that were right first time	76.8%	79.0%	2.2%	80.0%	74.2%	-5.8%
% of customers experiencing a problem with an organisation	17.8%	15.8%	-2%	16.1%	21.0%	4.9%

Positive changes compared to July 2020

Negative changes compared to July 2020

The top 50 organisations

Jul-21 Rank	Organisation	Sector	Jul-21 Score	Jul-20 Score	Jul-20 Rank	Change in score Jul-20 to Jul-21
1	first direct	Banks & Building Societies	86.6	84.2	3	2.4
2	John Lewis	Retail (Non-food)	84.4	85.3	1	-0.9
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9=	Specsavers	Retail (Non-food)	83.5	81.2	24	2.3
13=	Netflix	Leisure	83.4	82.5	13	0.9
13=	The Co-operative Bank	Banks & Building Societies	83.4	82.1	17	1.3
15	Aldi	Retail (Food)	83.3	82.9	10	0.4
16	Pets at Home	Retail (Non-food)	83.2	82.2	16	1.0
17	Octopus Energy	Utilities	83.1	80.9	29	2.2
18	M & S (food)	Retail (Food)	82.6	83.5	5	-0.9
19=	Nationwide	Banks & Building Societies	82.4	84.4	2	-2.0
19=	TK Maxx	Retail (Non-food)	82.4	77.6	124	4.8
21=	Deliveroo	Leisure	82.3	NO DATA	NO DATA	NO DATA
21=	RAC	Insurance	82.3	77.2	132	5.1
23	LV=	Insurance	82.2	83.0	8	-0.8
24	M & S	Retail (Non-food)	82.1	84.0	4	-1.9
25	Premier Inn	Tourism	82.0	82.9	10	-0.9
26=	SAGA Holidays	Tourism	81.9	78.5	93	3.4
26=	Trivago	Tourism	81.9	78.0	111	3.9
26=	Waitrose	Retail (Food)	81.9	78.2	100	3.7
29=	Dacia	Automotive	81.8	NO DATA	NO DATA	NO DATA
29=	Halfords	Retail (Non-food)	81.8	75.9	168	5.9

▲ Increase in UKCSI score of less than one point ▼ Fall in UKCSI score ▲ Increase in UKCSI score of one point or more

Jul-21 Rank	Organisation	Sector	Jul-21 Score	Jul-20 Score	Jul-20 Rank	Change in score Jul-20 to Jul-21
29=	Nissan	Automotive	81.8	80.8	31	1.0
32=	booking.com	Tourism	81.7	80.4	37	1.3
32=	Ikea	Retail (Non-food)	81.7	81.1	26	0.6
34	Holland & Barrett	Retail (Non-food)	81.6	80.8	31	0.8
35=	Screwfix Direct	Retail (Non-food)	81.5	NO DATA	NO DATA	NO DATA
35=	Škoda UK	Automotive	81.5	79.0	76	2.5
37=	Amazon Prime Video	Leisure	81.4	80.5	34	0.9
37=	Hyundai	Automotive	81.4	79.8	54	1.6
37=	Next	Retail (Non-food)	81.4	77.8	114	3.6
37=	Toyota	Automotive	81.4	81.9	19	-0.5
41=	Argos	Retail (Non-food)	81.2	79.7	58	1.5
41=	Green Flag	Services	81.2	79.8	54	1.4
41=	Starling Bank	Banks & Building Societies	81.2	80.6	33	0.6
44=	Aviva	Insurance	81.1	79.8	54	1.3
44=	Costa Coffee	Leisure	81.1	82.4	14	-1.3
44=	Ebay	Retail (Non-food)	81.1	79.6	61	1.5
44=	Jet2	Transport	81.1	80.3	41	0.8
44=	McDonald's	Leisure	81.1	81.5	21	-0.4
44=	Metro Bank	Banks & Building Societies	81.1	78.3	96	2.8
44=	Nationwide Insurance	Insurance	81.1	83.0	8	-1.9
44=	Tesco	Retail (Food)	81.1	79.2	73	1.9

▲ Increase in UKCSI score of less than one point ▼ Fall in UKCSI score ▲ Increase in UKCSI score of one point or more

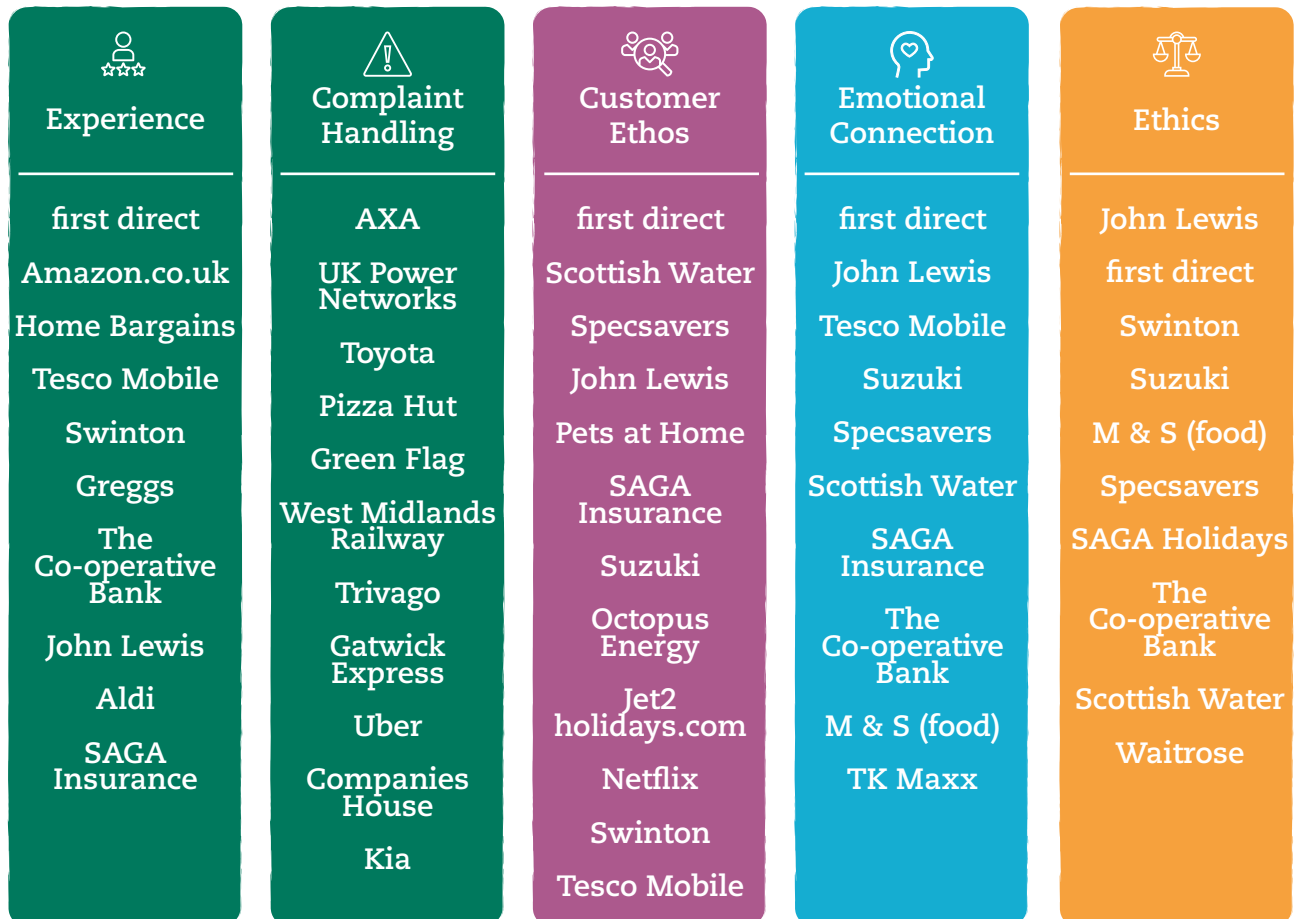
first direct is the highest rated organisation in the July 2021 UKCSI. Its score of 86.6 is 2.4 points higher than a year ago.

18 of the top 50 rated organisations have improved by more than 2 points compared to a year ago. 5 organisations – Suzuki, Swinton, RAC (Insurance), Scottish Water and Halfords recorded average customer satisfaction at least 5 points higher than in July 2020.

Looking across the UKCSI as a whole, Deliveroo, Just Eat and Screwfix Direct have received a UKCSI score for the first time.

Top rated organisations by customer satisfaction dimension

UKCSI dimensions



Only first direct and John Lewis are amongst the most highly rated organisations across the Experience, Customer Ethos, Emotional Connection and Ethics measures of customer satisfaction.

The Complaint Handling dimension features a wider spread of organisations amongst the top performers than the other dimensions. For Complaint Handling, only organisations for whom at least 10 complaints were recorded receive a published score. This means that, whereas for the Experience, Customer Ethos, Emotional Connection and Ethics dimensions every organisation receives a score, organisations generating particularly low levels of complaints may not receive published ratings for satisfaction with complaint handling.

20 most improved organisations

20 most improved organisations over one year	UKCSI score July 2020	UKCSI score July 2021	Change	Compared to sector average	Sector	Sector average UKCSI score
Swinton	74.9	83.9	9.0	4.9	Insurance	79.0
Abellio Scot Rail	60.7	69.6	8.9	-1.9	Transport	71.5
Northern / Northern Trains	60.8	68.6	7.8	-2.9	Transport	71.5
Southeastern (train operating company)	63.6	70.9	7.3	-0.6	Transport	71.5
Hotels.com	71.0	78.1	7.1	-0.7	Tourism	78.8
Jobcentre Plus	63.8	70.0	6.2	-7.3	Public Services (National)	77.3
Scottish Water	77.3	83.5	6.2	10.0	Utilities	73.5
Halfords	75.9	81.8	5.9	0.6	Retail (Non-food)	81.2
Southern	61.3	66.7	5.4	-4.8	Transport	71.5
Trailfinders	75.6	80.8	5.2	2.0	Tourism	78.8
Suzuki	78.9	84.0	5.1	4.9	Automotive	79.1
RAC	77.2	82.3	5.1	3.3	Insurance	79.0
UK Power Networks	73.7	78.6	4.9	5.1	Utilities	73.5
TK Maxx	77.6	82.4	4.8	1.2	Retail (Non-food)	81.2
CrossCountry	69.2	74.0	4.8	2.5	Transport	71.5
Great Western Railway	69.4	74.2	4.8	2.7	Transport	71.5
First Group - bus companies	63.0	67.7	4.7	-3.8	Transport	71.5
Virgin Mobile	68.1	72.7	4.6	-2.5	Telecommunications & Media	75.2
Utilita	72.0	76.6	4.6	3.1	Utilities	73.5
Scottish Gas	70.3	74.7	4.4	1.2	Utilities	73.5

■ Organisation is at least 1 point higher than the sector average

■ Organisation is at least 1 point lower than the sector average

Amongst the 20 most improved organisations, Swinton, Southeastern, Hotels.com, Jobcentre Plus, Scottish Water, Halfords, UK Power Networks, TK Maxx, First Group and Utilita have received their highest ever UKCSI scores.

Despite the year on year rise in customer satisfaction, only 11 of the 20 most improved organisations received at UKCSI score that is at least point higher than their sector average. Our research suggests that organisations that consistently achieve higher levels of satisfaction than their sector average are more likely to be rewarded by stronger financial performance and customer trust than their peers.

An independent, objective benchmark of customer satisfaction

A key purpose of the UKCSI is to provide a consistent benchmark that allows organisations, regulators, customers and other stakeholders to measure and compare performance within and across sectors. In this UKCSI, we provide an additional benchmark showing the average customer satisfaction scores for quartiles of the UKCSI.

July 2021 UKCSI: average scores by quartile of organisations



Customer satisfaction scores for the full range of UKCSI measures by sector and organisation are available in the 13 sector reports published alongside this report³. Organisations that are Institute members can also undertake a business benchmarking survey based on the UKCSI questions with a sample of their customers in order to benchmark performance with an appropriate sector or other benchmark.

³ See www.instituteofcustomerservice.com/ukcsi

2

Customer
satisfaction
and business
performance,
loyalty and
reputation

Sales have grown strongly in the Retail (Food) market, especially for organisations that have a relatively high proportion of website customer experiences

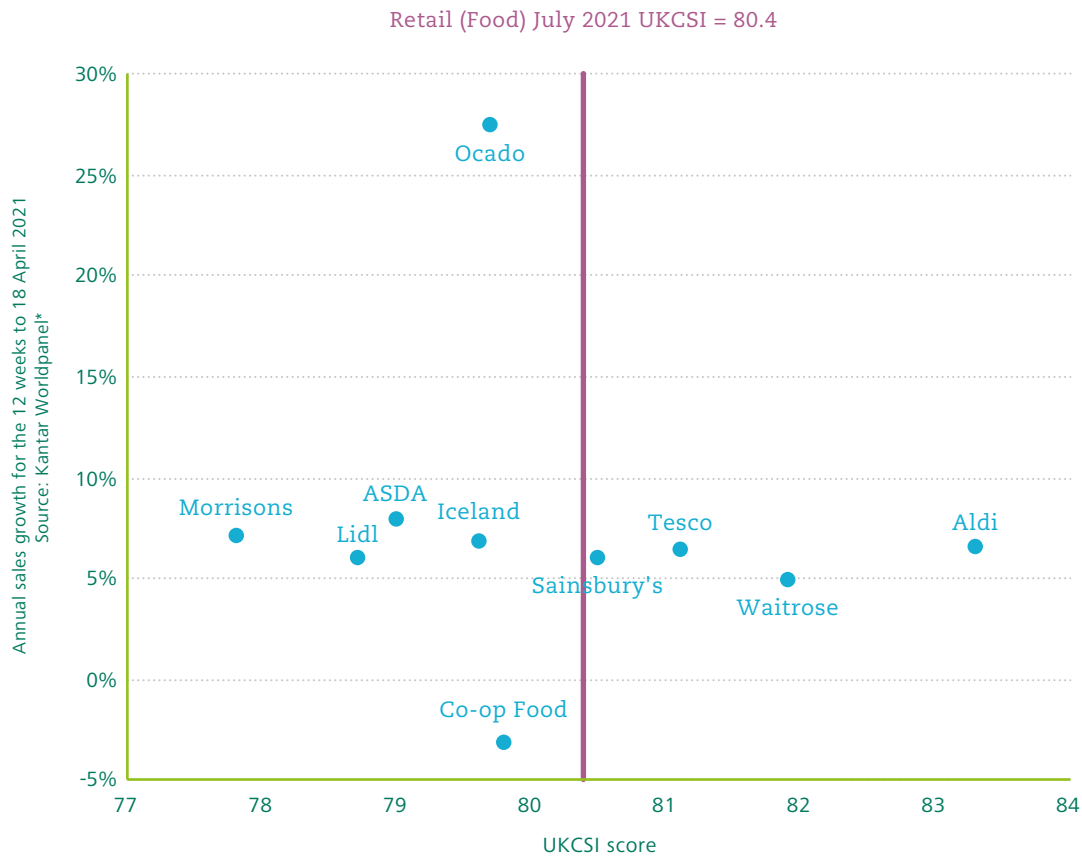
Kantar reported that UK grocery sales rose by 5.7% in the 12 weeks to 18 April 2021⁴. During this period, consumer confidence may have been boosted by the success of the Covid-19 vaccine rollout, especially amongst older customers. However, many restrictions remained in place or were only gradually being eased. From 8 March schools re-opened. From 29 March gatherings of 6 people or 2 households were permitted and the formal “stay at home” instruction was removed, although people were still asked to work from home and minimise their number of journeys.

Perhaps because of the general upturn in sales across the sector, there is no clear-cut relationship between customer satisfaction and sales growth or market share.

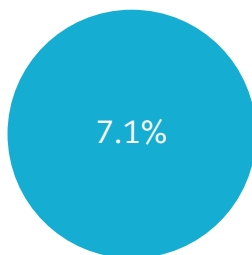


⁴ See www.kantar.com/uki/inspiration/fmcg/2021-wp-shoppers-paint-more-confident-picture-as-wider-retail-reopens

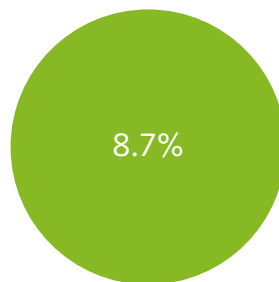
Customer satisfaction and sales growth: the Retail (Food) sector



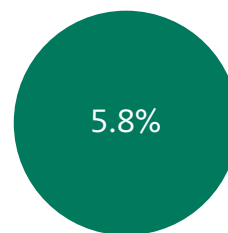
Food retailers with UKCSI at least 1 point below sector average



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



Food retailers with UKCSI at least 1 point above sector average



*Please note: M & S is the second highest rated food retailer, with a UKCSI score of 82.6, but is not included in Kantar's research on sales growth.

All of the food retailers that appear in both the UKCSI and Kantar's market research, except for Co-op Food, grew their sales in the 12 weeks to April 2021, compared to the same period in the previous year. Kantar suggests that Co-op Food's decline in sales may reflect its conspicuously strong sales growth for the same period in 2020, as its 2021 sales are 16.2% higher than the 2019 level.

Aldi is the highest rated food retailer for customer satisfaction. Its UKCSI score of 83.3 is 2.9 points above the sector average and its sales increased by 6.6%.

Waitrose is the sector's most improved organisation for customer satisfaction compared to July 2020. Its UKCSI score increased by 3.7 points to 81.9 and its sales grew by 5%.

Ocado posted by far the strongest sales growth (27.5%) of any Retail (Food) organisation. Its UKCSI score of 79.7 is 1 point higher than in July 2020 but 0.7 points below the sector average.

Asda is the fastest growing of the big four supermarkets. Its market share for the period increased to 14.8% thanks to an 8% growth in sales. Asda's UKCSI score of 79.0 is 0.8 points higher than a year ago but 1.4 points below the sector average.

Tesco's UKCSI score is 81.1, 1.9 points higher than a year ago. This is Tesco's highest ever score and the first time it has exceeded the sector average since 2008. Its sales grew by 6.4% in the 12 weeks to 18 April 2021.

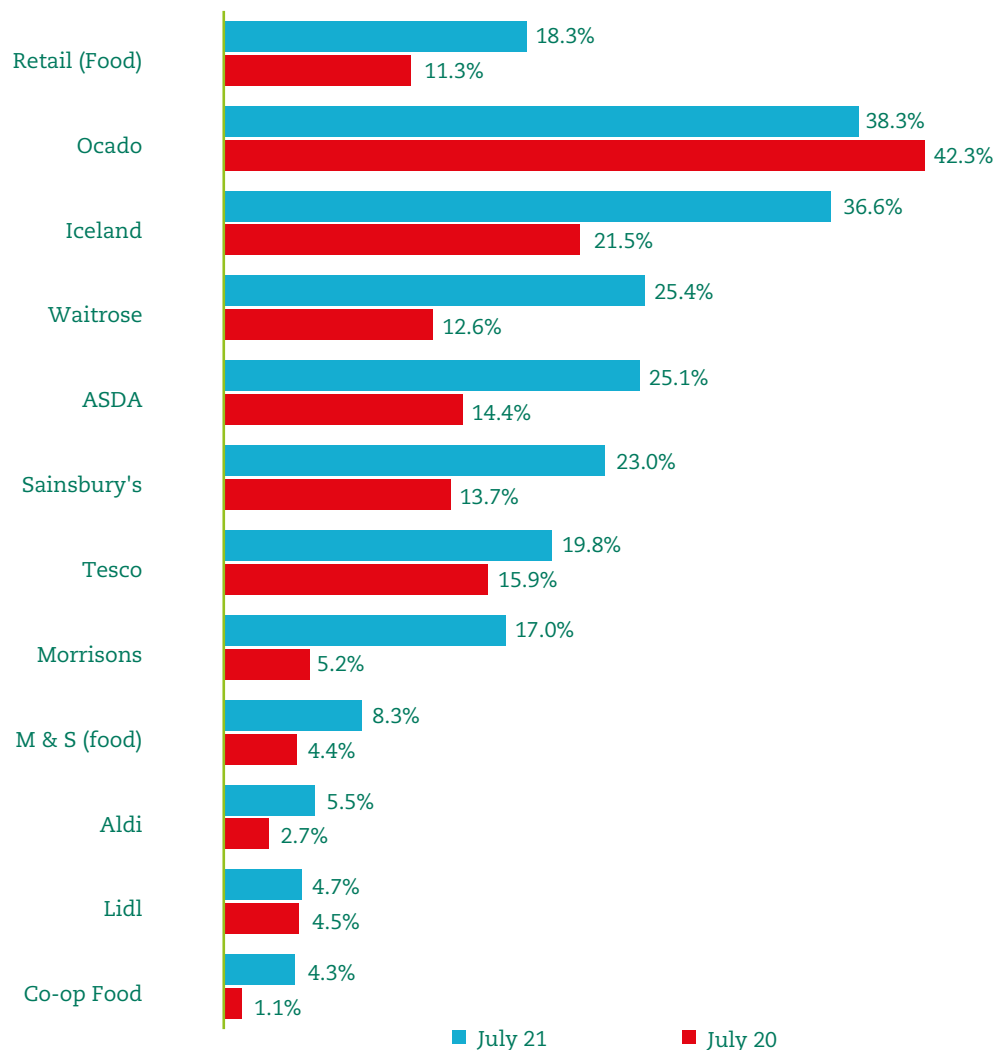
Sainsbury's average customer satisfaction improved year on year by 1.7 points to 80.5, just above the sector average, 80.4. Kantar reports that Sainsbury's sales grew by 6%.

Morrisons' UKCSI score of 77.8 is the same as in July 2020. It is the lowest rated Retail (Food) organisation in the July 2021 UKCSI, 2.6 points below the sector average. However, the gap between the highest rated organisation (Aldi) and the lowest (Morrisons) – 5.5 points – is relatively small. By comparison, across the 13 UKCSI sectors, the average gap between the highest and lowest rated organisations is 14.1 points.

In the Retail (Food) sector, the proportion of in person or in store experiences fell and the number of online experiences grew, compared to July 2020

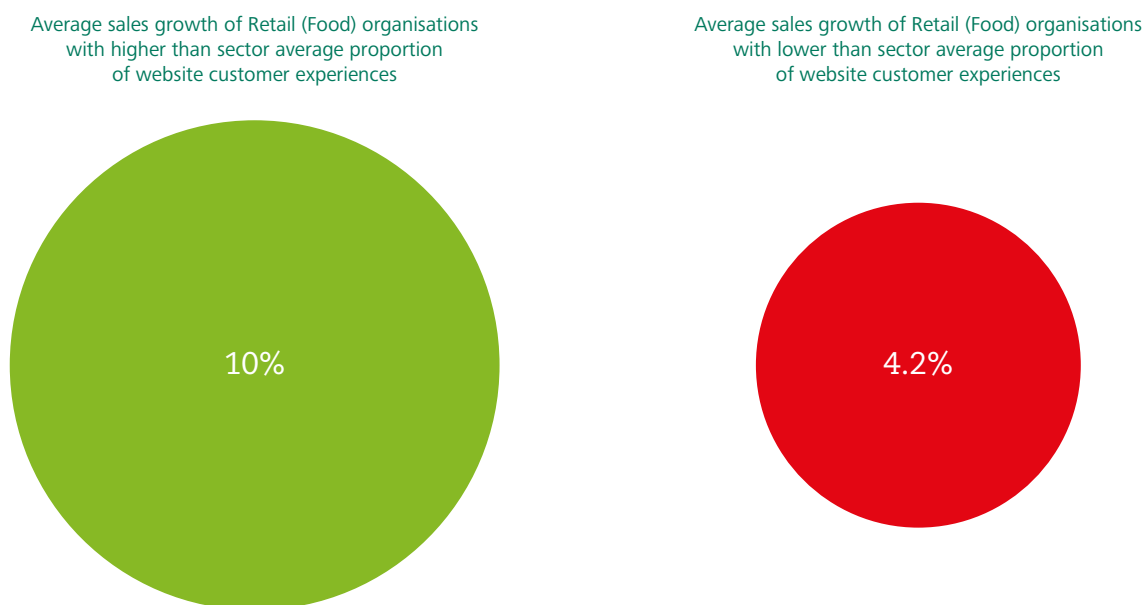
Over 65% of customer experiences were in person, more than any other sector, but 12.2 percentage points lower than in July 2020. The proportion of experiences conducted on an organisation's website increased by 7 points to 18.3%.

% customer experiences in the UKCSI on an organisation's website



Retail (Food) organisations recording a relatively high proportion of website customer experiences in the UKCSI generated an average sales growth of 10%, compared to 4.2% for those with a lower than average proportion of customers using their website.

Sales growth by proportion of website customer experiences with organisations in the July 2021 UKCSI



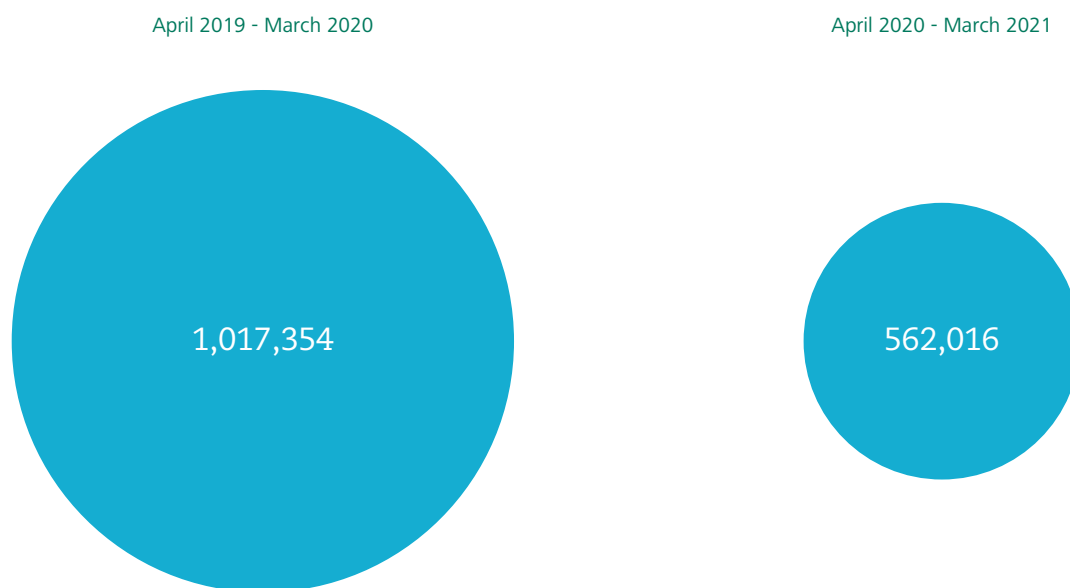
This evidence suggests that a combination of in store and digital experiences may have helped some organisations grow sales and market share during the Covid-19 pandemic. Online purchases are likely to remain a significant feature of the Retail (Food) customer experience. However, as Covid-19 restrictions are eased it is probable that the number of in store customer experiences will grow and that more people consume food and drink at restaurants, pubs and other outlets. As the Covid-19 trading environment evolves, food retailers will need to focus on the quality of customer experience the offer in all relevant channels in order to sustain sales growth.

Banks and Building Societies: customer satisfaction in the context of a reduction current account switches

In this UKCSI we have reviewed data from the latest Current Account Switch Service (CASS) dashboard, covering switches completing between 1 October and 31 December 2020, alongside the corresponding UKCSI period (January 2021).

The number of current account switches fell significantly after March 2020 and was much lower during 2020 than in the previous year. Restrictions during the Covid-19 pandemic are likely to be a major cause of the lower rate of switching. Switching data does not include account switches where the customer's old bank account was left open.

Volume of current account switches



Source: Current Account Switch Service Dashboard Issue 30

Lloyds Bank achieved the greatest number of net current account gains, followed by Starling Bank and NatWest. Lloyds Bank's UKCSI score in January 2021 (78.2) was just below the sector average, 78.3, but it was 1.6 points higher than in January 2019.

According to Lovemoney's analysis, incentives offered by banks seem to have significantly influenced switching behaviour⁵. Lloyds and NatWest are likely to have gained customers through the switching cash offers they ran during the reporting period. Starling has continued to grow and may have gained accounts from organisations whose continuity of service or customer experience has been affected by the pandemic.

Nationwide has usually been a leading beneficiary of current account switches but it has lost more accounts than it has gained since the third quarter of 2020. Some commentators have pointed to an increase in overdraft rates announced in November 2019 as a cause of the reduction in Nationwide's net current account gains. Nationwide reported that having reached its goal of achieving a 10% share of current accounts, the organisation decided to pause switching incentives to focus more on supporting existing members during the pandemic, rather than actively seeking new customers⁶.

In the January 2021 UKCSI, Nationwide was the second highest rated bank for customer satisfaction, after first direct, but its score was 2.5 points lower than the previous year.

A combination of organisations' differing switching strategies and the relatively low number of switches means that the relationship between customer satisfaction and current account switching is not straightforward.

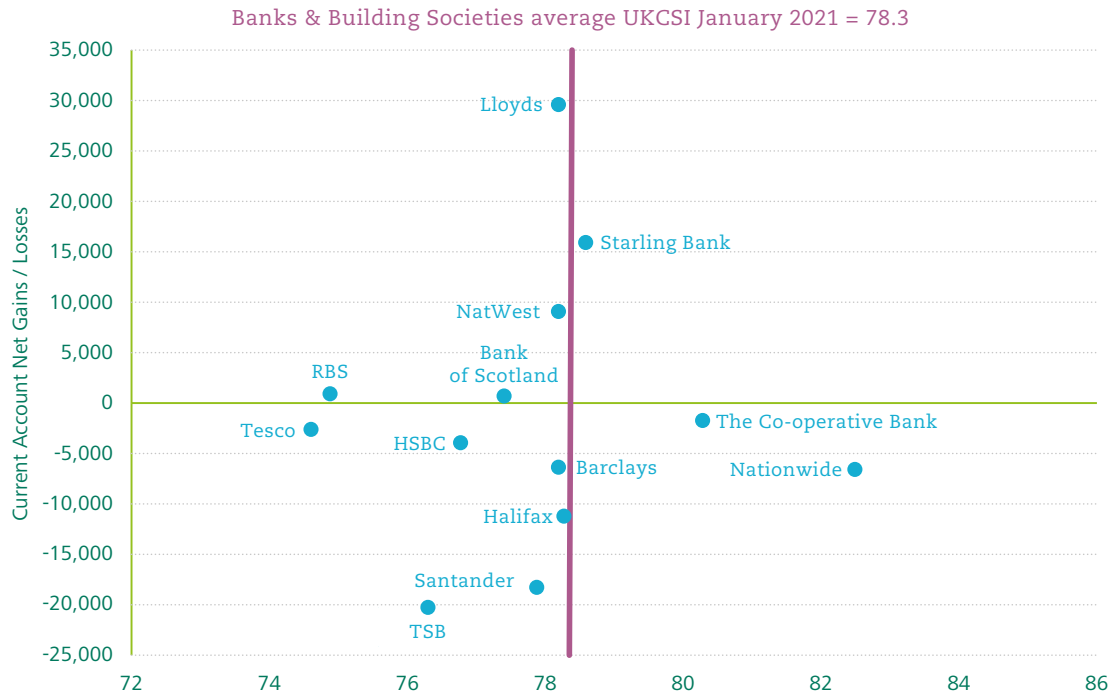
Banks or building societies that are listed in the CASS dashboard and whose customer satisfaction was at least 1 point better than the sector average (Nationwide and Co-operative Bank) recorded an average of 4,092 net current account losses, compared to an average of 6,414 net losses for those with a UKCSI score at least 1 point below the sector average (HSBC⁷, TSB, RBS and Tesco). Organisations whose UKCSI score is within 1 point of the sector average recorded an average of 2,750 net gains, mainly due to the relatively high number of net gains for Starling Bank, Lloyds and NatWest.

⁵ Lovemoney www.lovemoney.com/news/43887/the-banks-and-building-societies-were-all-switching-to

⁶ Nationwide Building Society interim results for the period ended September 2020

⁷ HSBC includes first direct and Marks & Spencer Bank brand switches

Customer satisfaction and current account net gains and losses

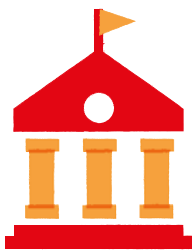


Source: Current Account Switch Service Dashboard Issue 30

Average current account quarterly net gains

Banks & Building Societies with a UKCSI at least 1 point above sector average

-4,092



■ Net current account losses

Banks & Building Societies with UKCSI within 1 point (+/-) of sector average

2,750



■ Net current account gains

Banks & Building Societies with a UKCSI at least 1 point below sector average

-6,414



■ Net current account losses

A 9 or 10 out of 10 for customer satisfaction drives greater loyalty, recommendation and trust

Across the average of all organisations in the UKCSI, achieving a 9 or 10 (out of 10) for customer satisfaction has a much stronger effect even than an 8 out of 10 in generating the highest levels of trust, recommendation, loyalty and reputation.



3

Customer experience during the COVID-19 crisis

In this section, we investigate how customer experience has evolved during the Covid-19 crisis, the extent to which the extent to which customers believe that the customer service they have received has changed during the pandemic, and the key issues customers believe organisations should improve

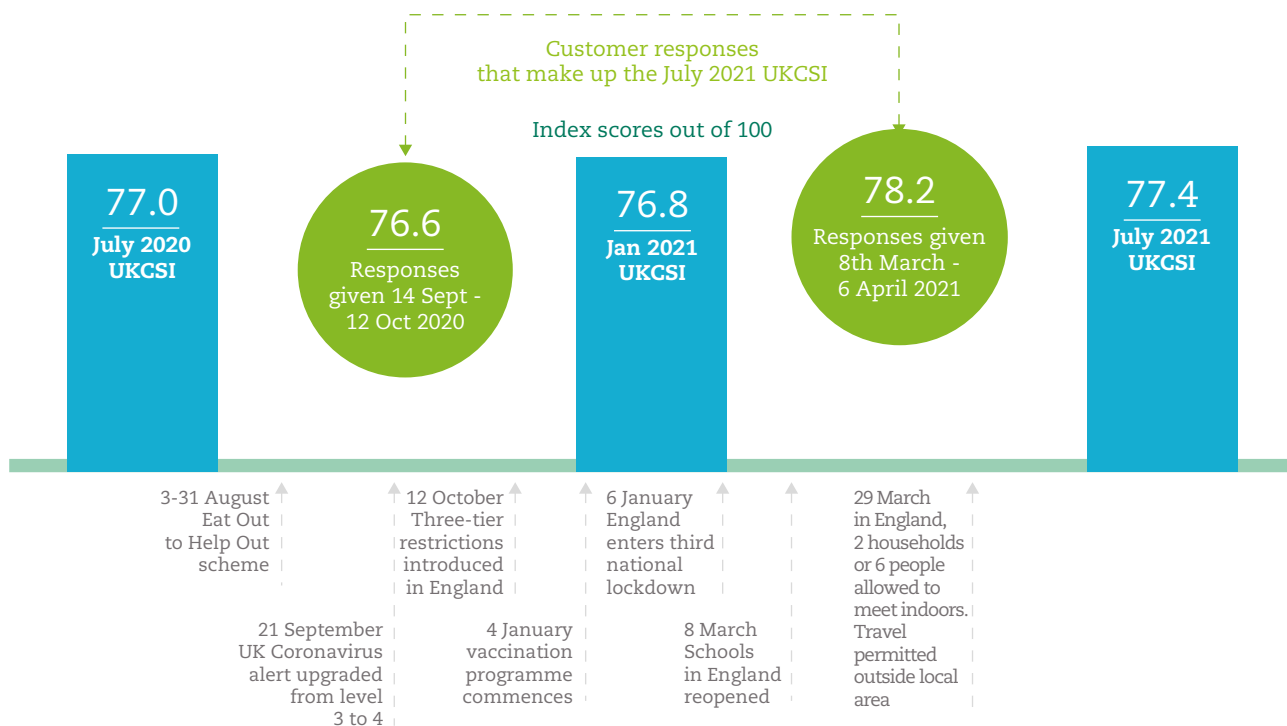
Overall customer satisfaction was higher for experiences recorded in spring 2021 than for those in autumn 2020

The customer data used in the July 2021 UKCSI is based on survey fieldwork collected between 14 September and 12 October 2020 and between 8 March and 6 April 2021.

Evidence from the latest UKCSI data shows that average customer satisfaction for experiences recorded in March and April 2021 was 78.2 (out of 100), 1.6 points higher than those recorded in the previous period (September – October 2020).

Therefore, the latest UKCSI data was collected after the return of strict lockdown measures in large parts of the UK from 31 December 2020 and before the re-opening of non-essential retail on 12 April 2021.

The UKCSI usually focuses on year on year comparisons and trends in customer satisfaction. Since the July 2020 UKCSI, we have also reviewed how customer satisfaction has evolved through the COVID-19 pandemic by examining data about customer experiences from the specific time periods in which the research was conducted.



The biggest improvement between autumn 2020 and spring 2021 is in the Transport and Tourism sectors

The Transport and Tourism sectors show the biggest improvement in overall customer satisfaction, when comparing data for customer experiences recorded in March – April 2021 and September – October 2020. In the Transport sector, the improvement was evident across the average scores for airlines, train operating companies and coach / bus operators.

Average customer satisfaction with organisations in the Banks and Building Societies, Insurance, Leisure, Public Services, Services and Telecommunications and Media sectors improved by more than 1 point for experiences recorded in March – April 2021, compared to those recorded in September – October 2020.

Although customer satisfaction in the Public Services (Local) sector in the July 2021 is 1.6 points lower than in July 2020, there is an upturn of 1.9 points for experiences recorded in spring 2021, compared to those in autumn 2020.



Customer satisfaction by sector during the Covid-19 crisis: July 2020 – July 2021

Customer responses
that make up the
July 2021 UKCSI

Overall CSI	July 2020 UKCSI	Responses given 14 Sept - 12 Oct 2020	Jan 2021 UKCSI	Responses given 8 March - 6 April 2021	July 2021 UKCSI	yoy change	Change between March / April 2020 and Sept / Oct 2020 responses
UK all-sector average	77.0	76.6	76.8	78.2	77.4	0.4	1.6
Automotive	78.3	78.8	78.4	79.3	79.1	0.8	0.5
Banks & Building Societies	79.1	77.9	78.3	79.6	78.8	-0.3	1.7
Insurance	78.6	78.4	78.4	79.6	79.0	0.4	1.2
Leisure	80.2	80.0	80.1	81.4	80.7	0.5	1.4
Public Services (Local)	75.3	72.7	74.4	74.6	73.7	-1.6	1.9
Public Services (National)	76.1	76.5	76.7	78.2	77.3	1.2	1.7
Retail (Food)	79.6	80.7	80.0	80.1	80.4	0.8	-0.6
Retail (Non-food)	80.0	80.9	80.5	81.5	81.2	1.2	0.6
Services	77.1	76.0	76.6	77.3	76.6	-0.5	1.3
Telecommunications & Media	74.2	74.5	74.3	75.9	75.2	1.0	1.4
Tourism	78.6	77.3	77.7	80.3	78.8	0.2	3.0
Transport	71.4	68.8	69.9	74.3	71.5	0.1	5.5
Utilities	72.6	73.1	72.7	73.9	73.5	0.9	0.8

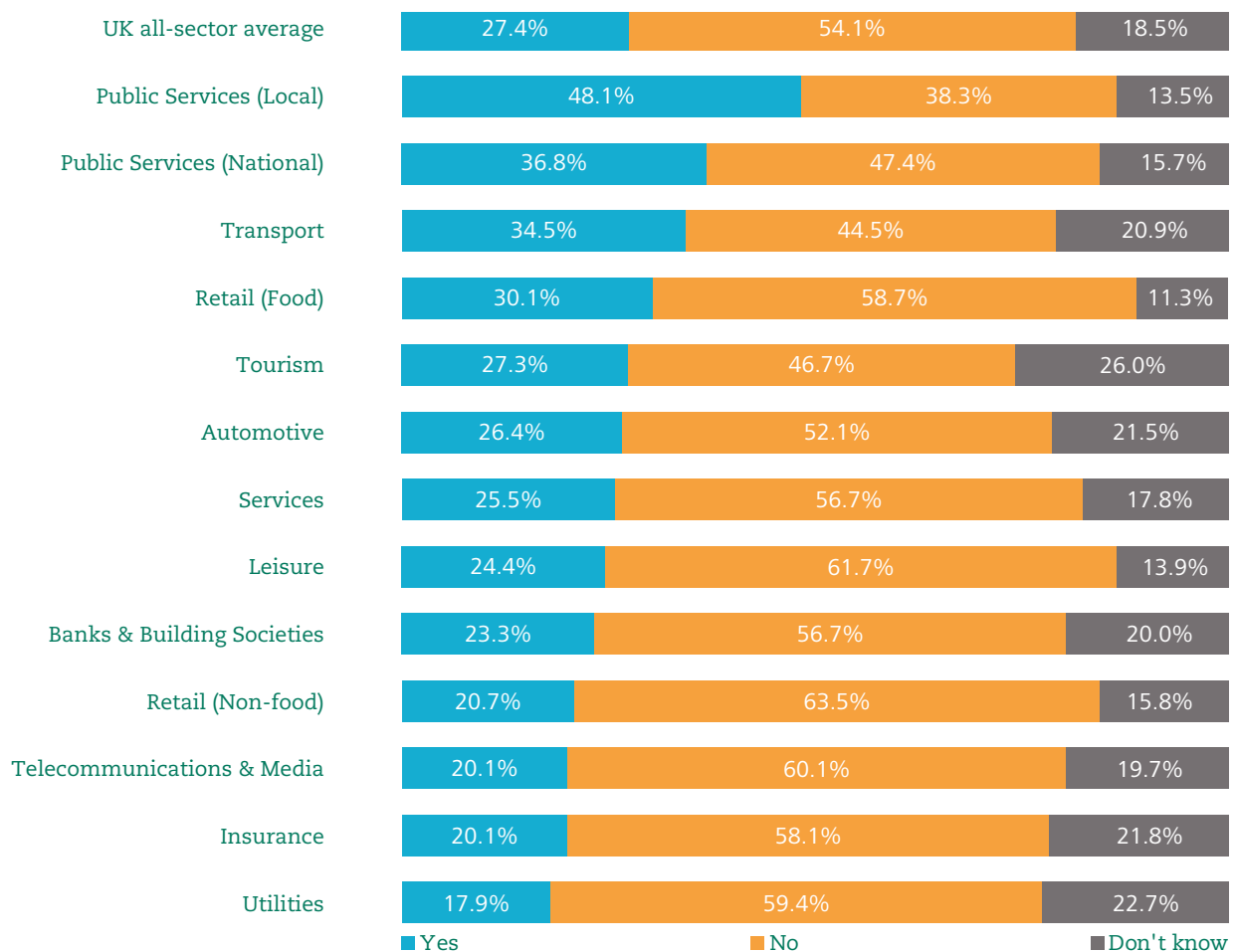
■ Increase in UKCSI score of at least 1 point

■ Drop in UKCSI score of at least 1 point

27% of customers have experienced a change in customer service during the Covid-19 pandemic. More than 50% of these customers said the change was positive; 24% said it was negative

In this UKCSI, we asked customers if they had experienced a change in the service provided by the organisation for whom they give a customer satisfaction rating. On average, 27.4% of customers say that they experienced a change in customer service they received from that organisation as a result of the Covid-19 pandemic. Customers were most likely to say there has been a change in the customer service they experienced in the Public Services (Local and National) and Transport sectors.

Do you think there has been a change in the customer service you get from xx because of Covid-19?

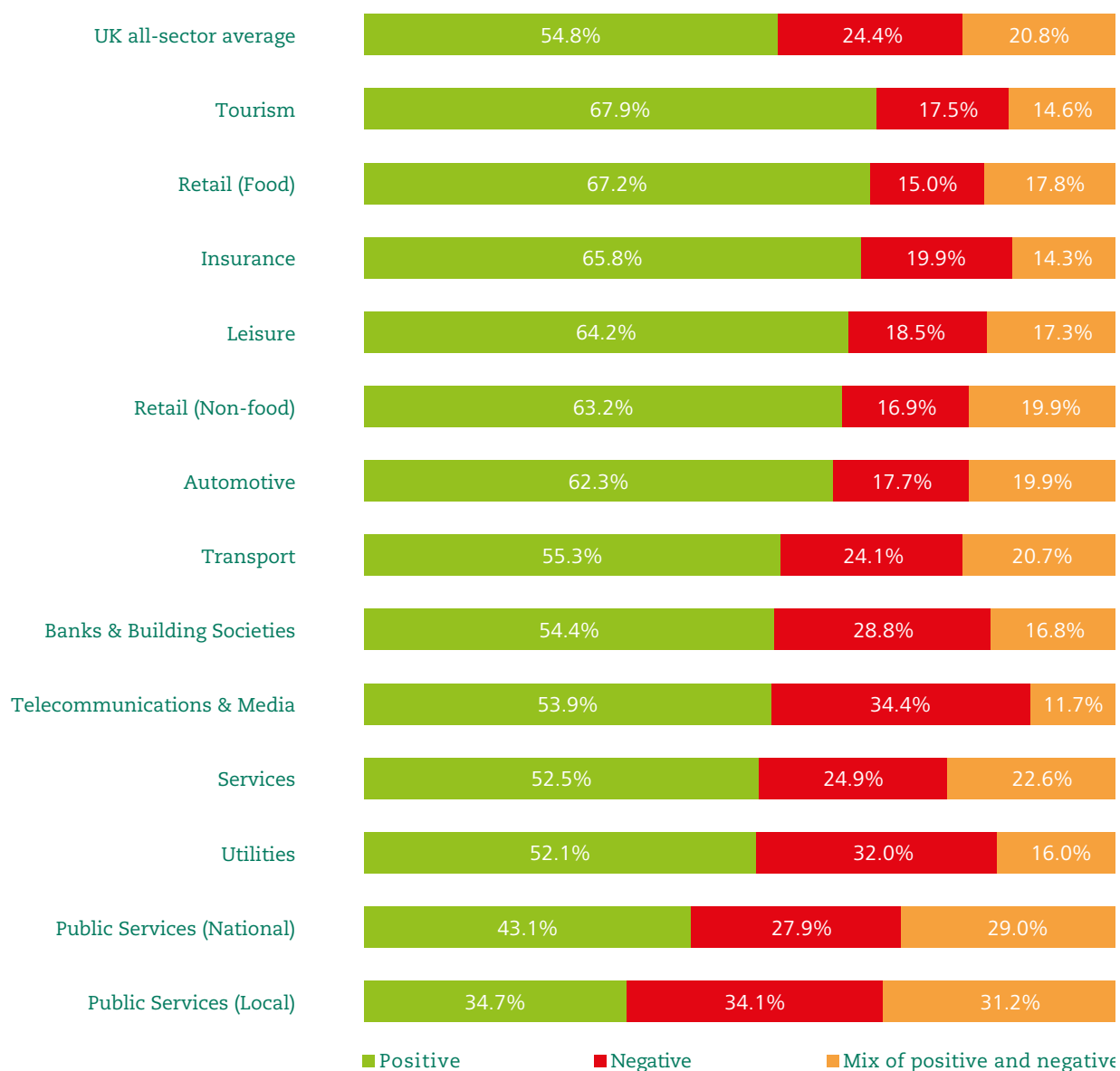


Please note: n/a responses (e.g. didn't deal with them prior to Covid-19) have been excluded from the percentages shown

Over 50% of customers who said their experience of dealing with an organisation had changed because of the Covid-19 pandemic said that the change was positive. Just under a quarter (24.4%) said their experience had changed for the worse. 20.8% felt that the change in customer service they experienced included a mix of positive and negative aspects.

Customers in the Tourism, Retail, Insurance, Leisure and Automotive sectors, who reported that the customer service they received had changed because of Covid-19, were the most likely to feel that the change was positive. Customers in the Telecommunications and Media, Public Services (Local) and Utilities sectors were the most likely to say that they had seen worse customer service because of changes during the Covid-19 pandemic.

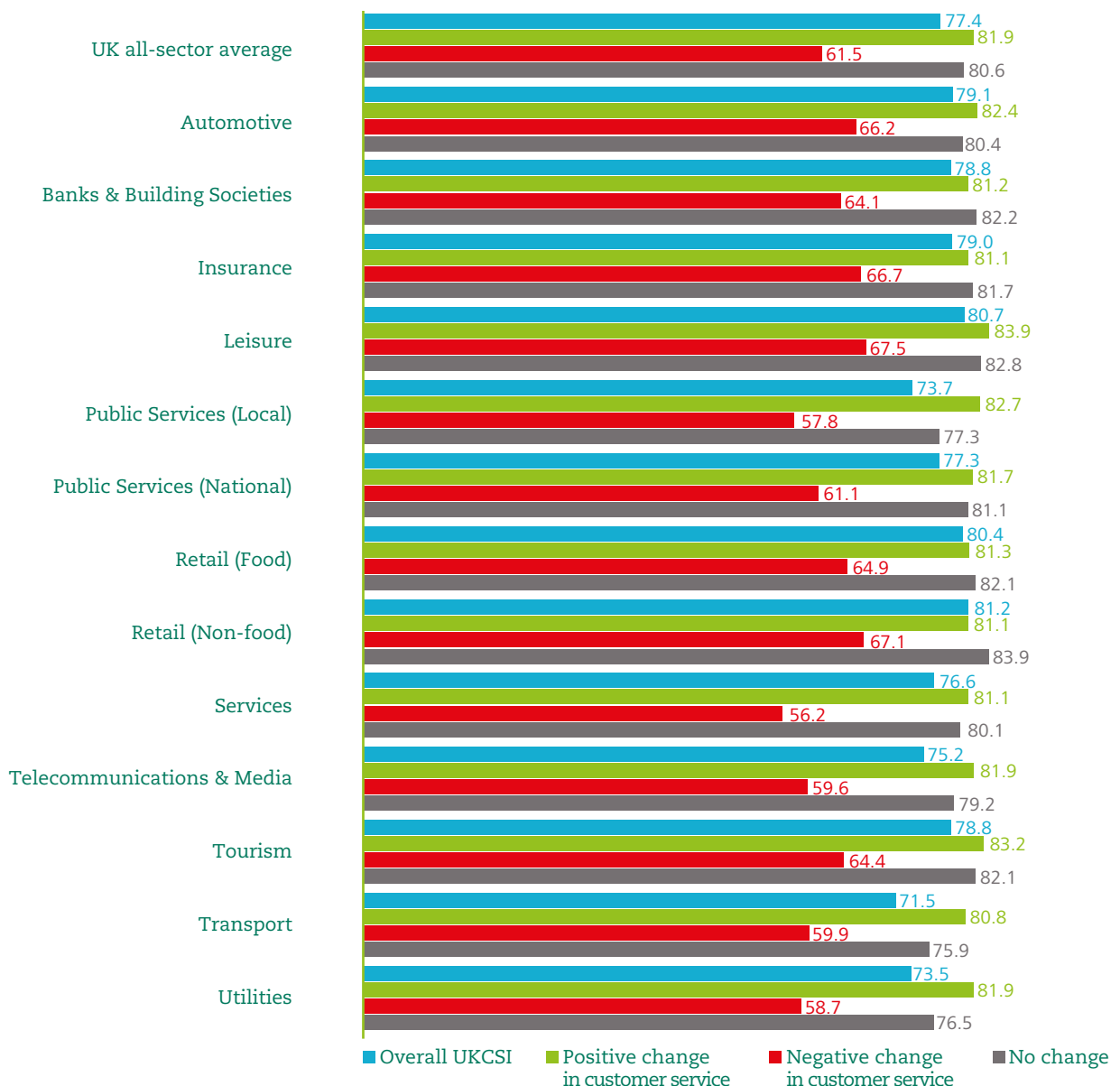
If you experienced a change in the customer service you get from xx, was it positive or negative?



Customers who have experienced a positive change in service during Covid-19 are slightly more satisfied than those who have seen no change. But customers who have experienced a negative change in service are much less satisfied than other customers

In general, customers who have seen a positive change in customer service from an organisation as a result of Covid-19 are more satisfied than those who did not see any change. This is especially the case in the Public Services (Local), Utilities, Transport and Telecommunications and Media sectors. However, in Retail (Non-food), Banks and Building Societies, Retail (Food) and Insurance, customers who said they had seen a positive change in customer service as a result of the pandemic had slightly lower satisfaction than those who did not see a change.

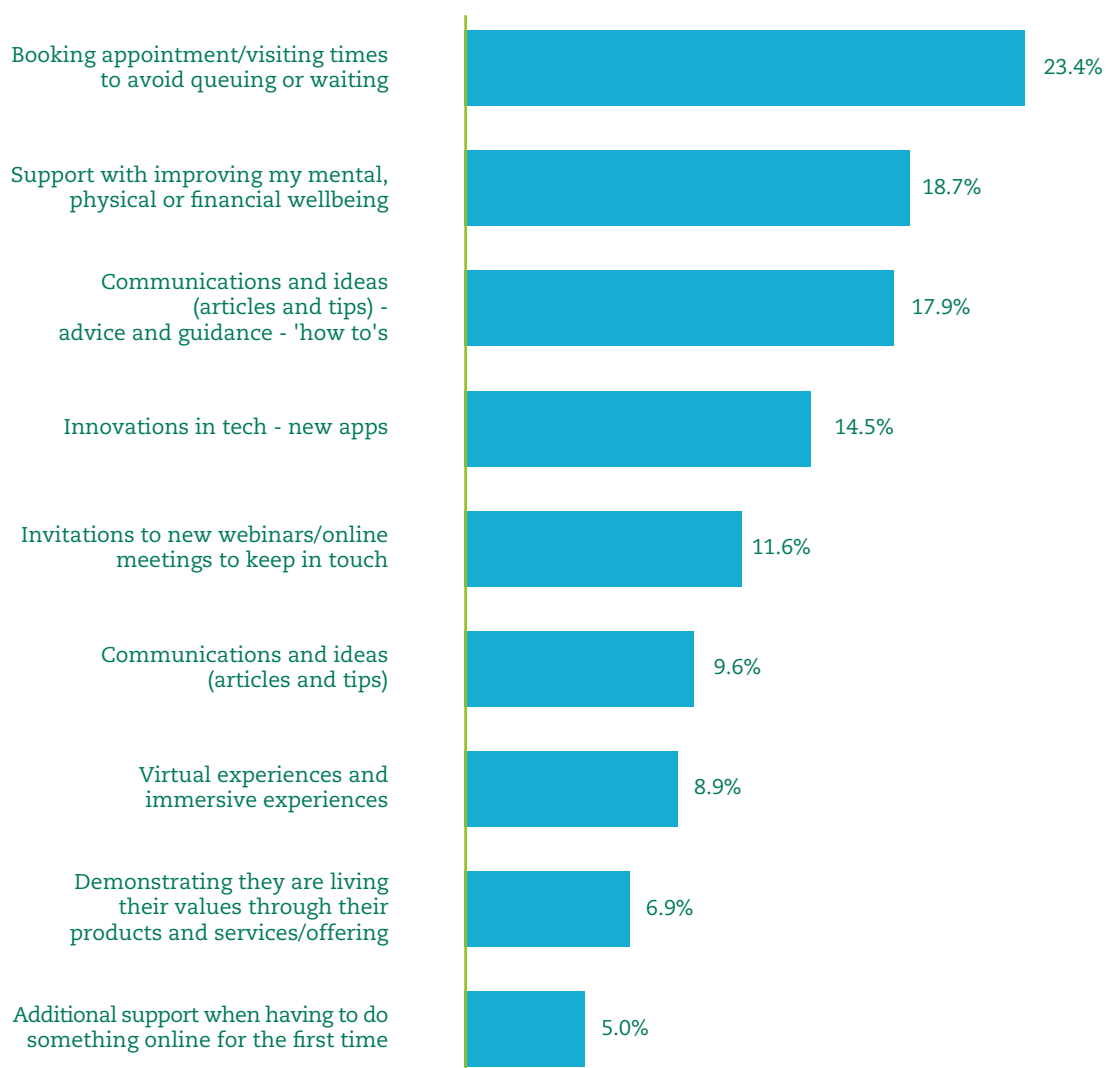
Average customer satisfaction based on experiences during the Covid-19 pandemic



The main positive changes in customer experience during the pandemic are better scheduling of appointments, support to improve well-being, and proactive communications

In a separate survey conducted alongside the UKCSI, The Institute asked a sample of over 1,000 customers about the changes in service they have experienced with organisations during the latest phase of the pandemic.

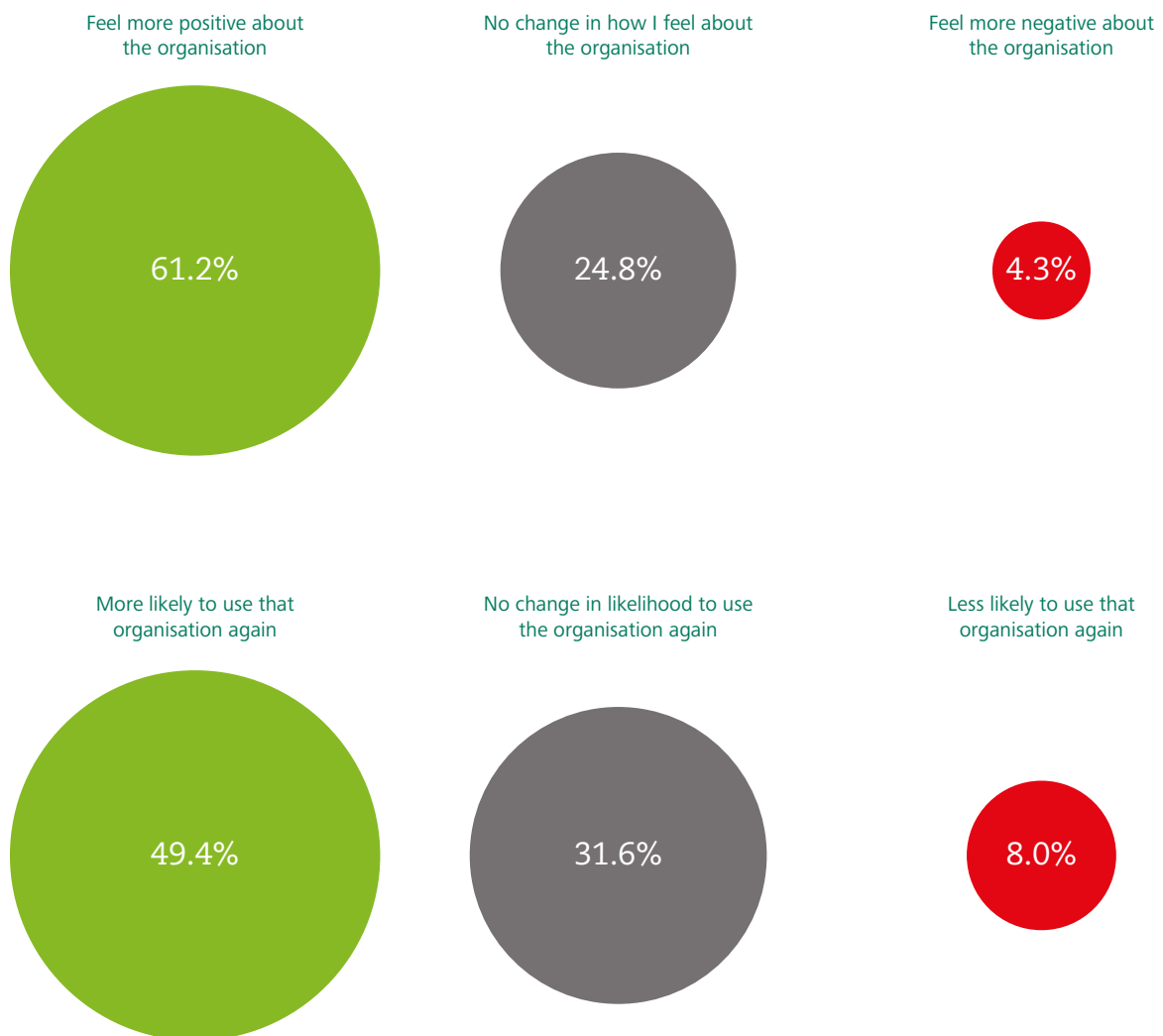
During Covid-19 some organisations have implemented new ideas: have you experienced any of the following?



49% of customers who experienced a new idea or improvement said they were more likely to buy from that organisation in future

New ideas and initiatives introduced by organisations during the Covid-19 pandemic often appear to be recognised and appreciated by customers. 61% said it made them feel more positive about an organisation and just 4% felt more negatively. 49% are more likely to buy from or use the organisation in future.

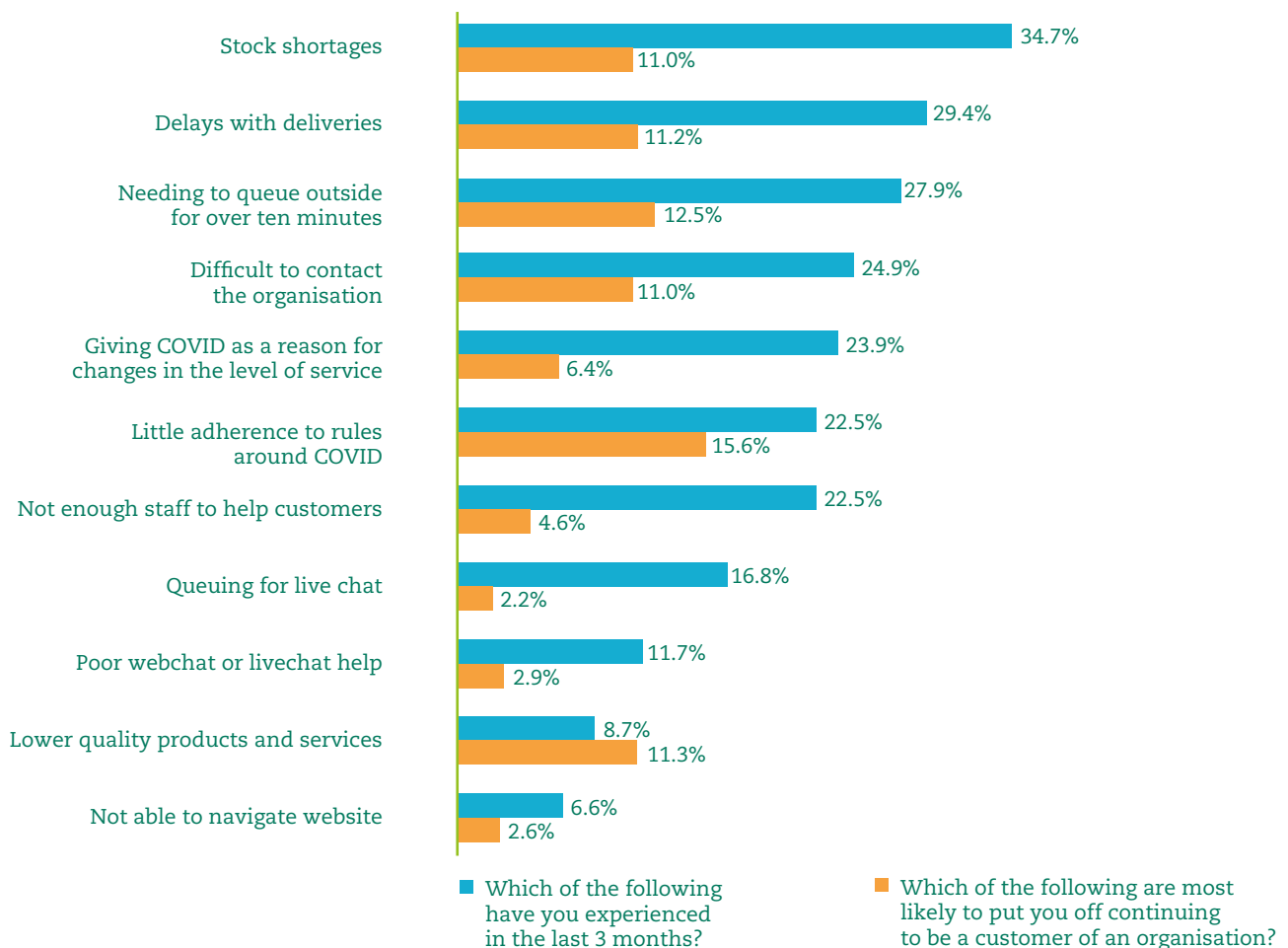
How has experiencing one of these new ideas made you feel about the organisation?



24% of customers feel that organisations have sometimes used the Covid-19 situation as an excuse for lower levels of service

Customers also reported having experienced a range of less welcome changes in service during the Covid-19 crisis. 35% of customers have experienced stock shortages in their interactions with organisations. At least 25% say they have suffered delays with deliveries, had to queue for longer, or found it difficult to contact an organisation. 24% of customers feel that organisations have sometimes used the Covid-19 situation as an excuse for lower levels of service and 23% have witnessed substandard adherence to Covid-19 rules in their experiences with organisations. Indeed, lack of adherence to Covid-19 rules is cited as one of the most likely reasons to stop using an organisation, followed by excessive queuing, lower quality of products and services, delays, stocks shortages and difficulties contacting an organisation.

Have you experienced any of the the following during the the Covid-19 pandemic?

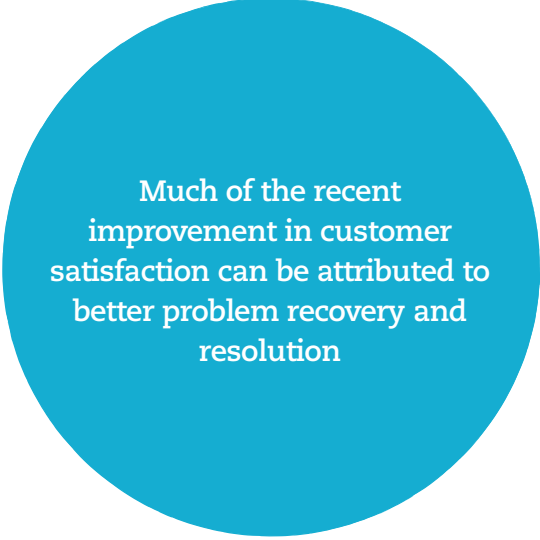


Customers who experienced a positive change in customer service during the pandemic have higher satisfaction with complaint handling than other customers

The UKCSI shows that customers who have experienced either a positive or negative change in service during the pandemic are both more likely than those who have seen no change to have had a problem with an organisation.

However, customers who experienced a positive change in customer service during the pandemic tend to have higher satisfaction with complaint handling than other customers. This underlines that much of the recent improvement in customer satisfaction can be attributed to better problem recovery and resolution rather than improvements across all dimensions of customer experience.

Customers who experienced a negative change in customer service during the pandemic expressed lower satisfaction than other customers on all measures of customer satisfaction, especially for xx makes it easy to contact the right person to help, cares about their customers, makes you feel reassured, keeps their promises, openness and transparency and ease of dealing with the organisation.



Much of the recent improvement in customer satisfaction can be attributed to better problem recovery and resolution

**Average customer satisfaction based on experiences during the Covid-19 pandemic:
selected measures on a scale of 1 - 10 except where indicated**

	UKCSI average	Customers who experienced a positive change in customer service	Customers who experienced a negative change in customer service	Customers who experienced no change in customer service	Positive change compared to no change	Negative change compared to no change
Ease of dealing with XX	7.9	8.3	6.2	8.3	0.0	-2.1
Speed of service/response	7.7	8.0	6.0	8.1	-0.1	-2.1
XX makes it easy to contact the right person to help	7.5	8.1	5.7	7.9	0.2	-2.2
The handling of the complaint	6.0	8.0	4.6	5.7	2.3	-1.1
Speed of resolving your complaint	5.9	8.1	4.4	5.6	2.5	-1.2
Ability to interact with XX in the way you prefer	7.9	8.3	6.1	8.2	0.1	-2.1
XX cares about their customers	7.6	8.1	5.9	7.9	0.2	-2.0
XX keeps their promises	7.7	8.2	5.9	8.0	0.2	-2.1
XX makes you feel reassured	7.7	8.3	5.8	8.0	0.3	-2.2
XX is open and transparent	7.6	8.2	5.9	7.9	0.3	-2.0
% experienced a problem with an organisation	14.9%	34.2%	41.5%	8.0%	26.2%	33.5%
% made a complaint	11.7%	31.6%	30.7%	6.0%	25.6%	24.7%

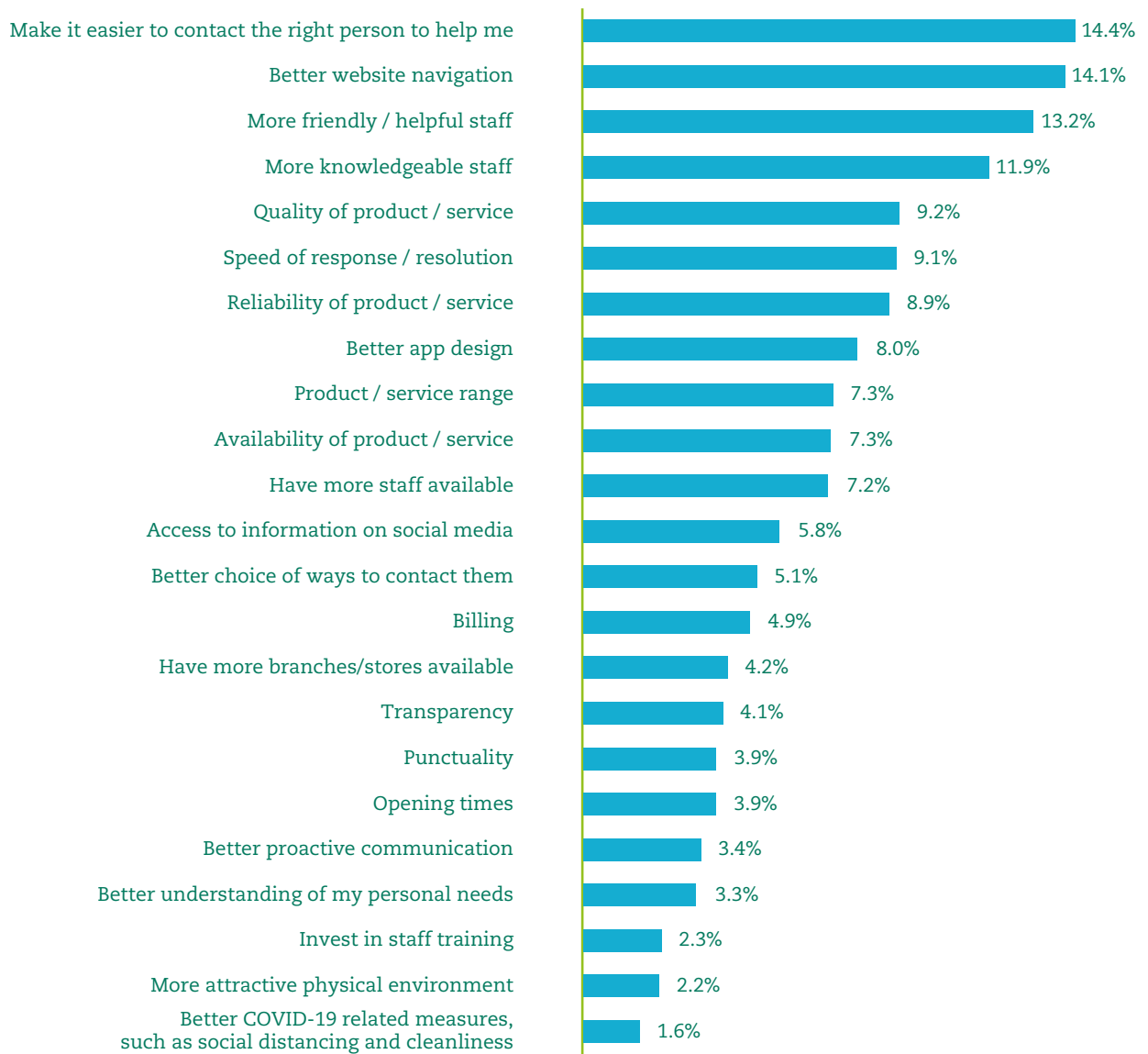
■ Positive difference of at least 1 point (out of 10)

■ Negative difference of at least 1 point (out of 10) or 20 percentage points

Making it easier to contact the right person to help, website navigation, more helpful, knowledgeable staff are the top issues customers want organisations to improve

In the UKCSI, customers are asked to highlight the top 3 issues that the organisation they dealt with should focus on to improve its service.

What are the top 3 things xx could do to improve its service?



Customer satisfaction during the Covid-19 crisis: key takeouts

- Overall customer satisfaction was higher for experiences recorded in spring 2021 than for those in autumn 2020
- The biggest improvement between autumn 2020 and spring 2021 is in the Transport and Tourism sectors
- 27% of customers have experienced a change in customer service during the Covid-19 pandemic. Over 50% of these customers said the change was positive; 24% said it was negative
- Customers who have experienced a positive change in service during Covid-19 are slightly more satisfied than those who have seen no change. But customers who have experienced a negative change in service are much less satisfied than other customers
- 49% of customers who experienced improvements made by organisations such as booking appointments to avoid wait times, support for well-being, and proactive communication, said that they were more likely to use the organisation in future
- 24% of customers feel that organisations have sometimes used the Covid-19 situation as excuse for lower levels of service
- Making it easier to contact the right person to help, website navigation, more helpful, knowledgeable staff are the top issues customers want organisations to improve

4

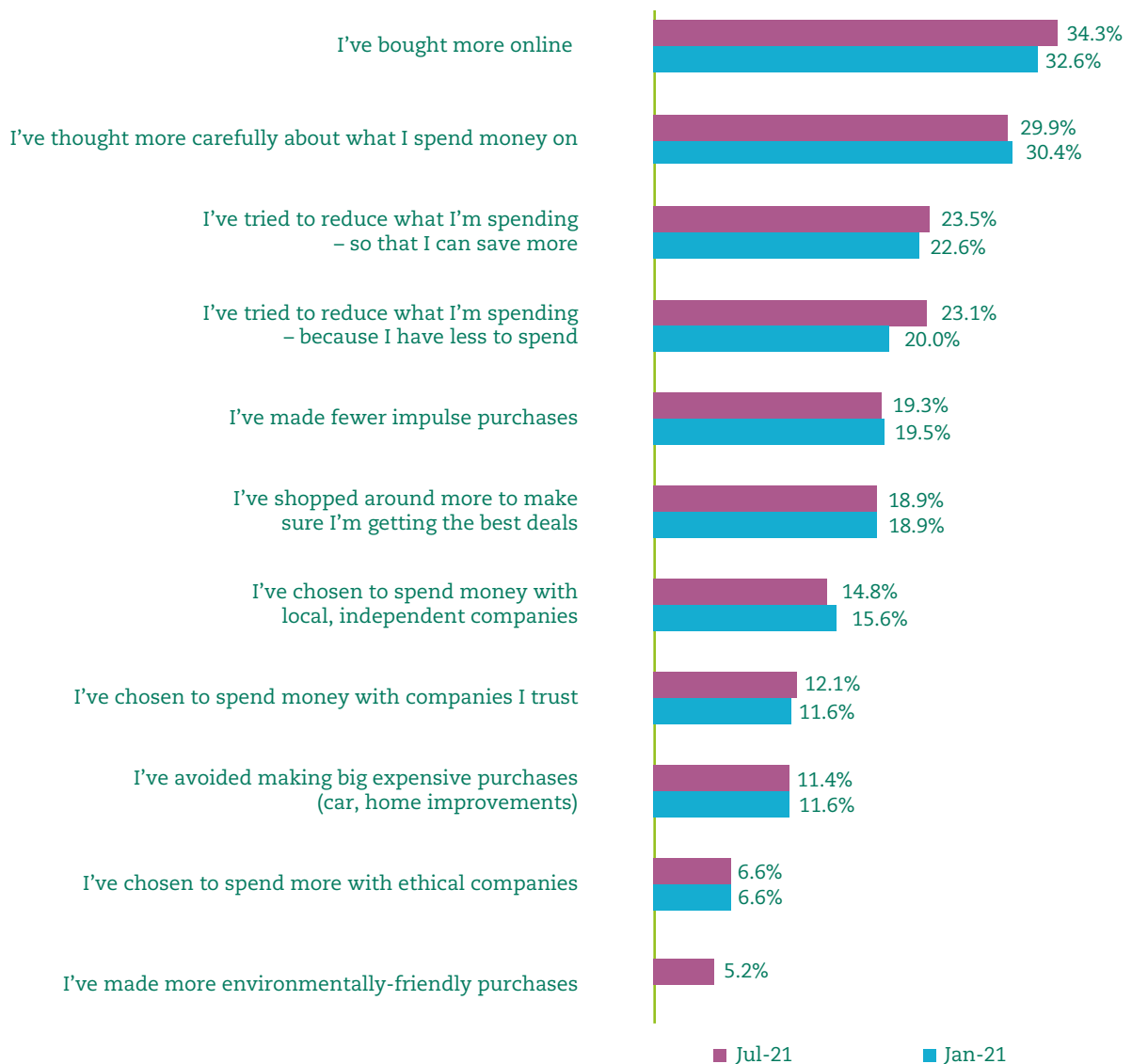
Changing behaviours and preferences

This section examines changes in customers' buying behaviour in the last 6 months and the extent to which customers are willing to pay for excellent customer service.

Over 30% of customers have made more online purchases in the last 6 months. More than 20% have reduced and thought more carefully about what they spend

The July 2021 UKCSI re-emphasises changes in customer behaviour that were identified in the January 2021 UKCSI report. Over 30% of customers have made more online purchases in the last 6 months. More than 20% of people have thought more carefully about how they spend and tried to reduce their spending, either to save more or because they have less to spend.

During the last 6 months have your spending habits changed in any of the following ways?

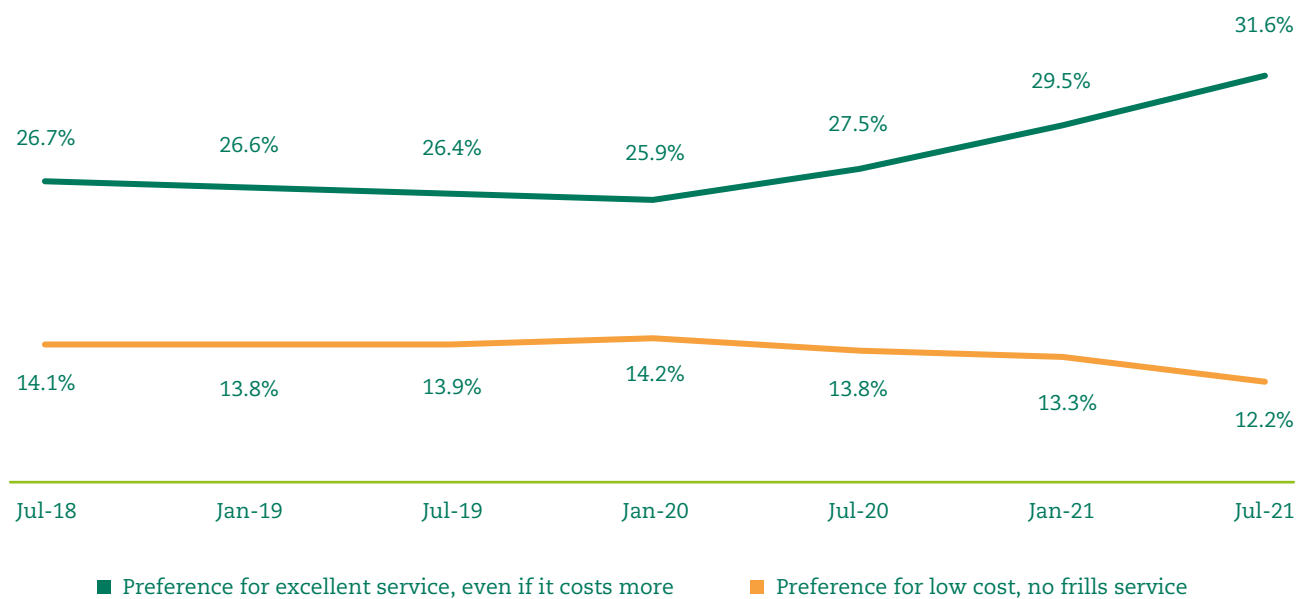


The number of customers who prefer to pay more for excellent service has increased in the last year

We asked customers to prioritise the relative importance of service and price on a scale of one to ten, where one indicates a preference for lowest price, no frills service and ten expresses a preference for excellent or “premium” service, even if it means paying more.

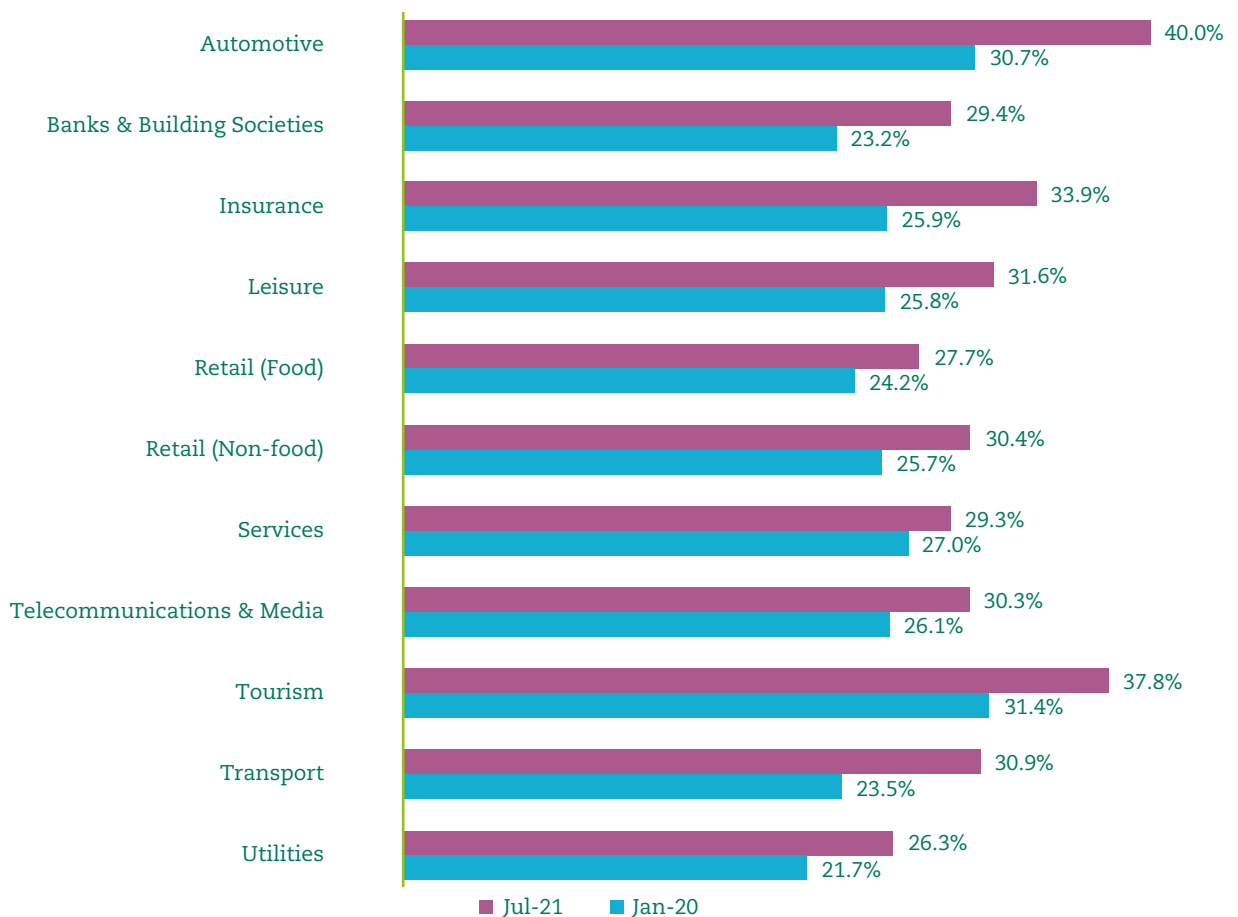
Our research suggests that in the last year, there has been a growth in the number of customers who prefer excellent service, even if means paying more, and a drop in the proportion of customers who prefer lowest cost service, even if it means sacrificing the level of service.

Service preferences: Do you prefer to pay more for excellent service or prefer lowest cost, no frills service ?



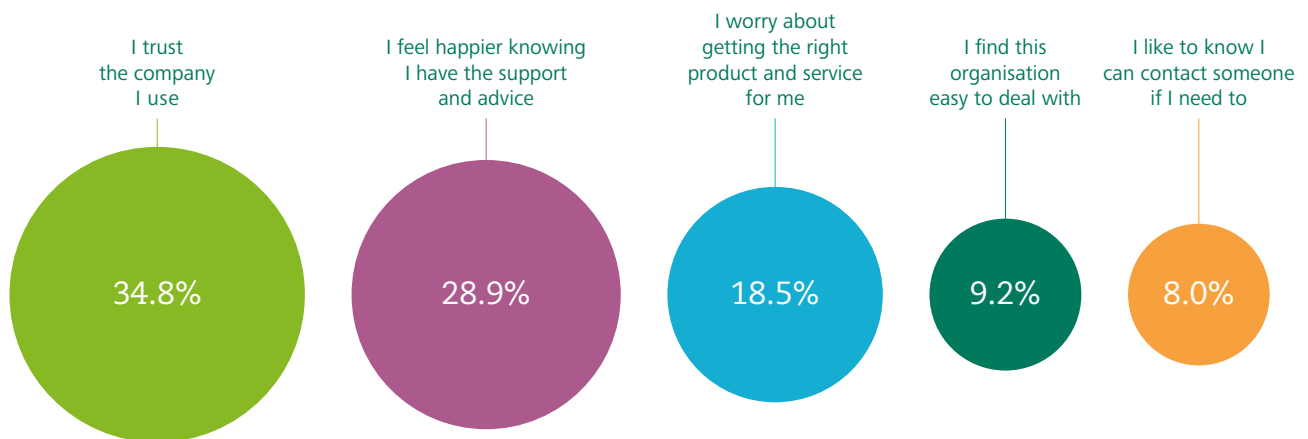
The shift towards more customers preferring excellent service, even if it costs more, appears to be present in all sectors but is especially evident in the Automotive, Insurance, Transport, Banks and Building Societies and Tourism sectors.

% customers who prefer excellent service, even if costs more, by sector



The leading reasons why customers prefer excellent service, even if it costs more are because they trust an organisation or feel reassured that they receive the support and advice they need

Why do you prefer excellent service, even if it means paying more?



In the Automotive, Telecommunications and Media Tourism sectors, customers are more likely than average to value the reassurance of support and advice as a reason to pay more for excellent service.

In the Banks and Building Societies sector, trusting an organisation is the leading reason to pay more for excellent service, but customers are also more likely than average to cite a concern about getting the right product service to meet their needs.

In the Retail (Non-food) sector, trusting an organisation is seen as a particularly important reason for valuing excellent service.

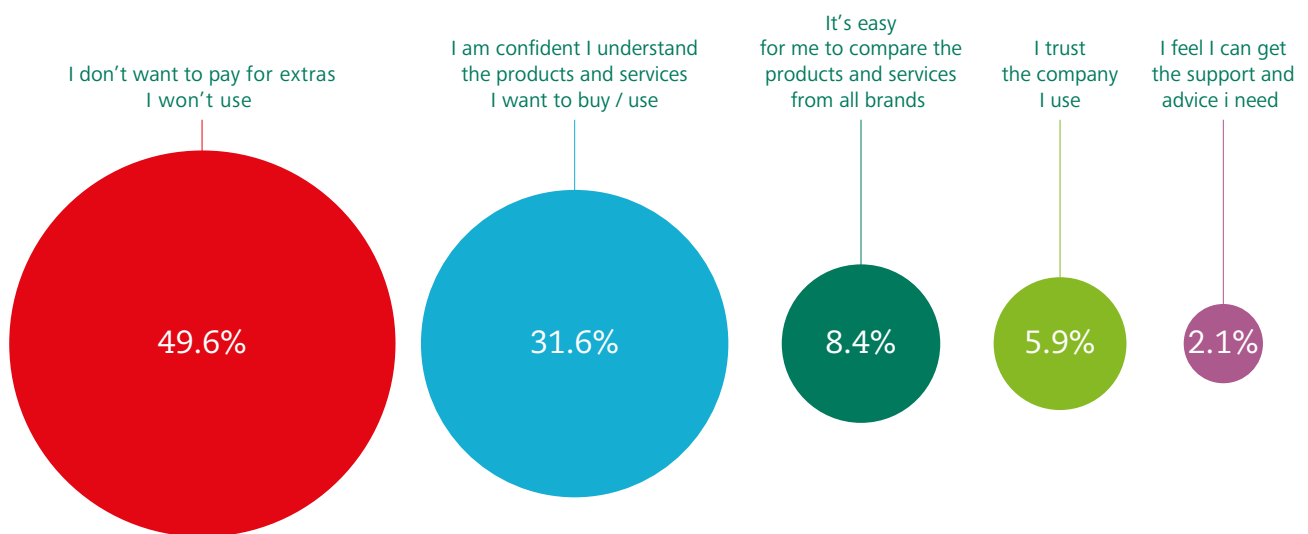
Reason why customers prefer excellent service, even if it means paying more

	I feel happier knowing I have the support and advice	I find this organisation easy to deal with	I like to know I can contact someone if I need to	I trust the company I use	I worry about getting the right product and service for me
UK all-sector average	28.9%	9.2%	8.0%	34.8%	18.5%
Automotive	33.4%	6.6%	5.7%	32.0%	22.0%
Banks & Building Societies	27.1%	6.8%	8.7%	31.6%	25.4%
Insurance	27.5%	10.9%	8.9%	30.4%	22.1%
Leisure	24.0%	14.0%	8.6%	36.7%	15.4%
Retail (Food)	23.6%	11.0%	6.0%	37.6%	21.0%
Retail (Non-food)	23.9%	12.5%	5.3%	40.6%	17.1%
Services	27.2%	9.5%	10.9%	34.5%	17.7%
Telecommunications & Media	34.1%	7.0%	8.9%	37.0%	12.7%
Tourism	34.0%	6.3%	10.1%	33.6%	15.5%
Transport	28.8%	9.6%	8.2%	34.7%	17.7%
Utilities	31.2%	8.5%	6.9%	36.5%	15.6%

■ At least 5 percentage points more than the all-sector average

Customers who prefer no frills, lowest cost service do so because they don't want to pay for extra options they won't use, or are confident in their knowledge and use of the products and services they have bought

Why do you prefer lowest cost, no frills service?



In the Retail (Non-food) sector, customers are more likely than average to cite confidence in their understanding of products and services and ease of comparing different brands as their reasons for preferring lowest cost, no frills service.

In the Telecommunications and Media, Transport and Utilities sectors, customers who prefer lowest cost service are especially motivated by a desire to avoid paying more for extras they don't need.

Reasons why customers prefer lowest cost, no frills service

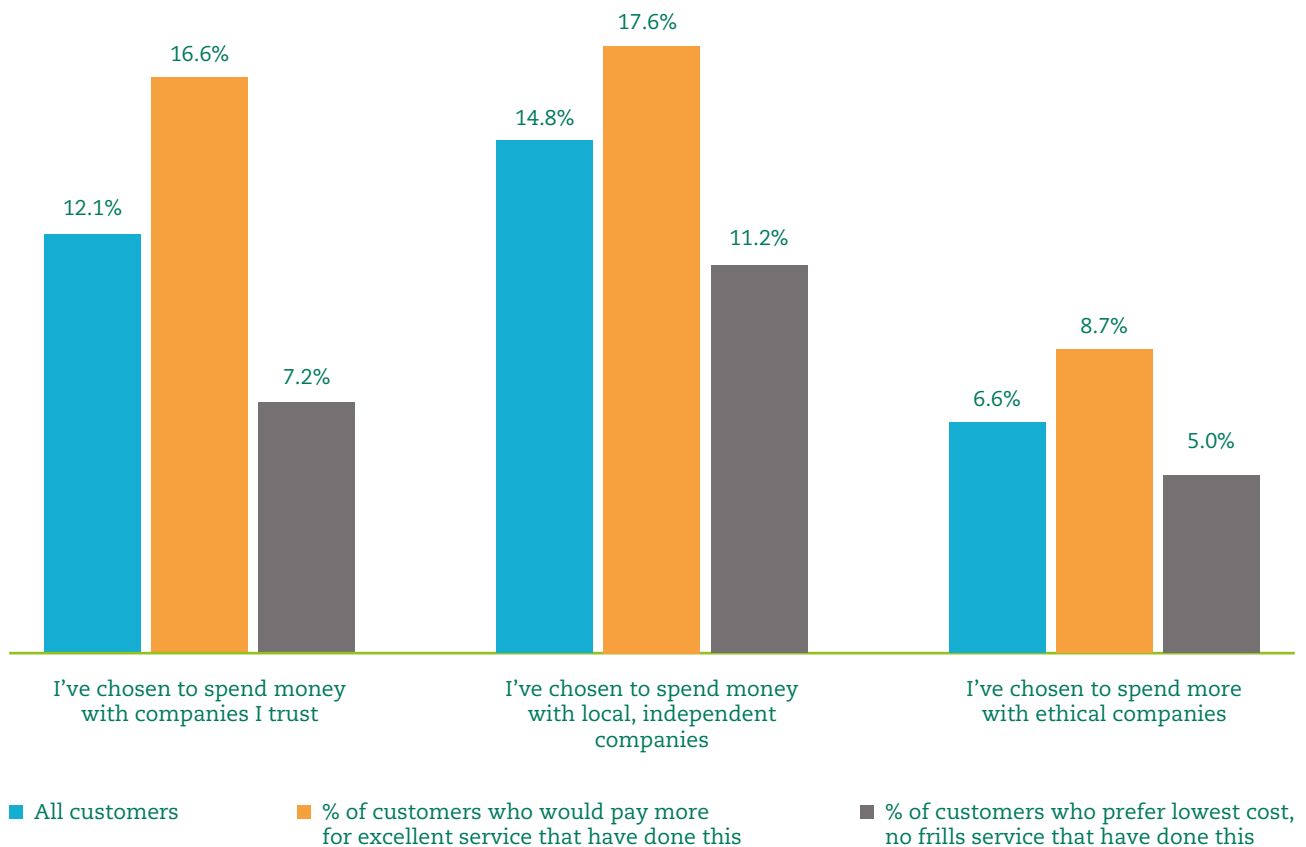
	I am confident I understand the products and services I want to buy/use	I don't want to pay for extras I won't use	I feel I can get the support and advice I need	I trust the company I use	It's easy for me to compare the products and services from all brands
UK all-sector average	31.6%	49.9%	2.1%	5.9%	8.4%
Automotive	29.7%	47.3%	1.4%	8.1%	12.2%
Banks & Building Societies	35.3%	48.9%	3.8%	4.3%	4.3%
Insurance	24.7%	52.5%	1.3%	5.7%	15.2%
Leisure	37.6%	47.5%	1.1%	8.3%	3.9%
Retail (Food)	39.8%	43.5%	0.9%	6.9%	8.8%
Retail (Non-food)	39.8%	38.9%	2.3%	4.6%	13.4%
Services	32.6%	47.1%	1.2%	8.7%	5.2%
Telecommunications & Media	23.4%	60.5%	2.0%	3.9%	8.8%
Tourism	29.0%	50.0%	3.0%	9.0%	5.0%
Transport	27.2%	55.3%	2.8%	5.0%	6.9%
Utilities	24.4%	56.3%	3.4%	4.2%	8.7%

■ At least 5 percentage points more than the all-sector average

Customers who prefer to pay more for excellent service are the most likely to spend more with companies they trust and with local, independent or ethical companies

In general, these behaviours have been practised by similar numbers of customers, whether they prefer excellent service, even if it costs more, or prioritise lowest cost, no frills service. However there are some differences; customers who prefer premium service are more likely to have spent more with companies they trust and with local, independent or ethical companies.

During the past 6 months have you changed your behavior in the following ways?



Changing behaviours and preferences: key takeouts

- Over 30% of customers have made more online purchases in the last 6 months. More than 20% have reduced their spend, and thought more carefully about what they spend
- The number of customers who prefer to pay more for excellent service has increased in the last year, to 31.6%
- The leading reasons why customers prefer excellent service, even if it costs more, are because they trust an organisation or feel reassured that they receive the support and advice they need
- Customers who prefer to pay more for excellent service are the most likely to spend more with companies they trust and with local, independent or ethical companies
- Customers who prefer no frills, lowest cost service do so because they don't want to pay for extra options they won't use, or are confident in their knowledge and use of the products and services they have bought

5

Key learnings and recommendations for organisations

We conclude our review of the state of customer satisfaction in the UK by reflecting on key learnings for organisations from the Covid-19 pandemic and implications for customer experience



1 In the context of Covid-19, organisational purpose is even more critical to success



2 Combining the best of digital and human interactions to design experiences around customer needs



3 Developing a blend of digital, interpersonal, applications development and customer experience skills



4 Complaint handling is essential to reduce customer dissatisfaction but is not enough to drive further improvements in satisfaction and engagement



5 Environmental and social impact are increasingly relevant to an organisation's customer proposition



6 Proactive communication and engagement to maintain and develop trust



7 Developing flexibility and innovation to respond to change and create new opportunities



8 Customer satisfaction and employee engagement have become important measures of corporate governance



9 A long-term focus on customer service to enable sustained business performance



10 Learning the lessons from Covid-19 to prepare better for future shocks

1) In the context of Covid-19, organisational purpose is even more critical to success

Many leaders see organisational purpose - “the fundamental motivation which inspires the vision and guides the mission and resulting strategy⁸” - as essential to attract and retain talented employees, guide customer and stakeholder relationships, build reputation and performance.

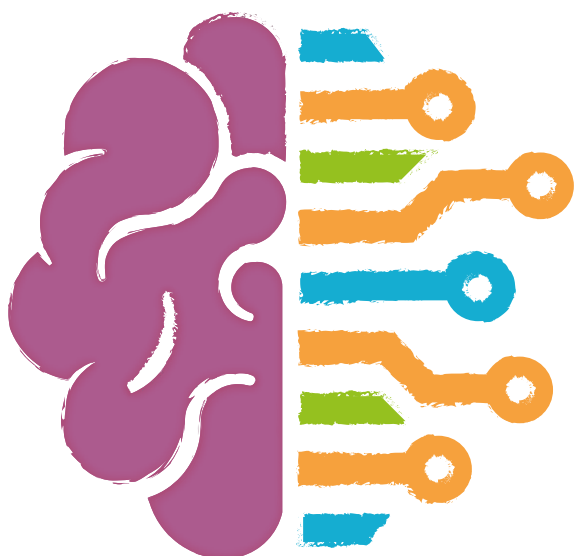
In the context of Covid-19, purpose has arguably become even more critical to organisations’ success. Many organisations face difficult choices about where and how to focus in order to meet commercial, customer or social objectives. Some leaders may be tempted to prioritise short-term or tactical initiatives in order grow revenues or protect profits. However, Covid-19 creates the opportunity to redefine or restate an organisation’s purpose: who the organisation is there to serve; the benefit and impact it delivers and how these will be measured; and the value that underpin its activity. In the unpredictable and challenging months ahead, a clear organisational purpose creates a coherent base from which to energise employees and stakeholders, strengthen core capabilities and make appropriate choices about innovation, growth or rationalisation.



⁸ See The What, the Why and the How of Purpose. A guide for leaders. Chartered Management Institute, 2018

2) Combining the best of digital and human interactions to design experiences around customer needs

In the last year, more customers have interacted with organisations through digital channels, either through choice or necessity. For the first time, the number of digital experiences recorded in this UKCSI (conducted on an organisation's website or via email, app, web chat, text or social media) is the same as the number through the combination of traditional channels of in person, phone and in writing. Many organisations have successfully developed innovative ways of engaging with customers by giving greater transparency of personal data or appointments, or through virtual consultation and demonstrations. Yet evidence from the UKCSI shows that the ability to speak to the right person to help is the leading issue customers want organisations to improve. For most organisations, especially those that serve a diverse range of customers, combining the best elements of digital and human experiences will be critical to engaging effectively with customers.



Our research suggests that key enablers for building trust through digital channels are:

- Simplifying customer journeys so that customers can self-serve effectively for routine queries and transactions
- Using technology to enable routine transactions, access to additional services and transparency of information
- Integrating customer data to deliver appropriate and relevant personalisation of messaging and offers
- Enabling easy access to speak to a person when it is needed

Human intervention is especially important when empathy, judgement or discretion is required, for example:

- Where a customer needs advice about different options
- A customer is experiencing a sudden change in circumstances or a challenging life event, such as moving house, bereavement, change in employment status
- Where an organisation has failed to meet commitments, or a problem has occurred
- Experiences that have high personal importance for customers

3) Developing a blend of digital, interpersonal, applications development and customer experience skills

Organisations increasingly recognise that, as they emerge from the pandemic, they need to develop the skills and capabilities of their existing employees in order to succeed.

Customers' changing channel use and the models of working and collaboration that have developed during the pandemic have highlighted the importance of basic and intermediate digital skills. Covid-19 has also accentuated the importance of empathy and interpersonal skills in relationships with customers, employees and other stakeholders. Effective managers have recognised that productivity and business results require spending time and effort to engage and build trust with employees. The evolving omnichannel environment has heightened the importance of nurturing a blend of skills and capabilities in empathy, resilience, customer experience design, data, application and artificial intelligence development.

Organisations will need to reassess strategically the skills they require, current capabilities and gaps, skills and training programmes and the options to access and disseminate learning. Delivery of training will also need to adapt and flex, using a mix of methods tailored to content, employees' job roles, working environment, operational needs and access to technology.



4) Complaint handling is essential to reduce customer dissatisfaction but is not enough to drive further improvements in satisfaction and engagement

Usually, when customers experience more problems with organisations, average levels of satisfaction fall. However, the past 2 UKCSI reports have seen small increases in overall levels of customer satisfaction alongside record numbers of customers experiencing a problem with an organisation. In part, this reflects the extraordinary circumstances of the Covid-19 pandemic. Many organisations have needed to reconfigure their operating model, working patterns, resourcing or supply chains and, in some cases, this has impacted on continuity of customer service. However, evidence from research conducted alongside this UKCSI suggests that many customers feel that organisations have sometimes used Covid-19 as an excuse for lower levels of service.

This UKCSI shows that many of the organisations that have higher customer satisfaction than a year ago have generated fewer problems for customers, enabled more experiences that are right first time and performed better on complaint handling. Conversely, organisations whose customer satisfaction has declined compared to a year ago have generally created more problems for customers and achieved lower complaint handling scores. The key ingredients of effective complaint handling – a positive response when a problem is reported, quick resolution, keeping customers informed of progress and following up after resolution – remain essential to customer service.

Nevertheless, customers who have experienced a problem are generally less satisfied than those who have not: only exceptional complaint handling results in higher than average customer satisfaction. In order to drive further improvements in customer satisfaction and engagement, organisations cannot rely on problem resolution and service recovery.

Organisations that sustain the highest levels of customer satisfaction perform strongly across the full range of measures in the UKCSI. These organisations have typically defined a purpose that combines focus on their core proposition and capabilities and a wider commitment to make a positive impact on society. They design experiences around the needs of their customers, enabling customers to interact in the way they prefer as much as possible. They invest time and resources in employee development, training and engagement so that their people provide appropriate help, advice and reassurance to customers. They seek to be open and transparent in their communications with customers, governance and business practices. Across the UK economy, further improvement in customer satisfaction will require a focus not just on problem solving and complaint handling, but on all dimensions of customer satisfaction and engagement.



5) Environmental and social impact are increasingly relevant to an organisation's customer proposition

Covid-19 has exposed in stark terms the interconnectedness of our society and economy. Many vital social and economic challenges can only be addressed effectively by collaboration involving government, organisations, communities and individuals. Customers increasingly expect organisations not just to adhere to legal and regulatory responsibilities but to play an active role in improving society. Forward thinking organisations recognise that long-term success and resilience requires a healthy, sustainable society and environment. This implies a heightened awareness and focus on the priorities of a broad range of stakeholders including shareholders, customers, employees, suppliers, communities and government. As a result of these developments, environmental and social practice has become increasingly relevant to an organisation's customer proposition. Achieving high levels of customer satisfaction and trust requires a credible ethical agenda alongside excellence in products and services, transactional delivery, employee skills and behaviours.



Examples that demonstrate the impact of an organisation's environmental and social purpose include:

- A credible commitment to the sustainability agenda in operations, supply chain and customer engagement
- Treating employees fairly, for example ensuring that all employees receive a living wage, and a genuine commitment to diversity and inclusion
- Developing collaborative supplier relationships that enable suppliers to make a fair return on investment, and seeking to sustain relationships when economic conditions are challenging
- Making investment decisions that take into account ethical criteria
- Balancing the needs of new and existing customers when making investment decisions
- Helping to develop skills, infrastructure and sustainable capacity in communities in which the organisation operates

6) Proactive communication and engagement to maintain and develop trust

In an online world where information and opinion about organisations is readily accessible, transparency is central to developing customers' trust and engagement. Many of the organisations that have maintained or improved customer satisfaction during the Covid-19 pandemic have communicated proactively with customers, giving transparent information about changes in service and seeking to help customers manage their financial, physical or mental well-being.

Evidence from the research conducted alongside this UKCSI shows that many customers have appreciated relevant proactive communications and as a result feel more positive and engaged in their relationship with an organisation (see page 58). Conversely, many of the issues most likely to reduce customers' trust in organisations are concerned with lack of transparency, such as hidden costs or manipulation of online reviews.

As the health and economic impacts of Covid-19 continue to evolve, organisations may need to review and modify their service offering. Proactive consultation and communication with customers will be critical in understanding customer needs, identifying sustainable solutions and maintaining trust.



Examples of transparency that can help improve and maintain trust⁹ include:

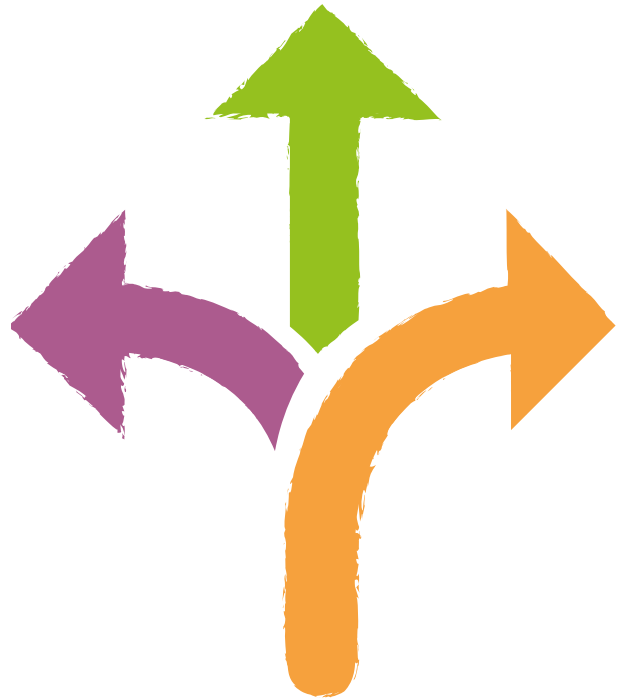
- Timely, proactive communications especially about pricing or service changes
- Clarity of terms and conditions, especially for refunds
- Setting realistic timescales
- Being honest about mistakes
- Publication of performance metrics, customer feedback, consultations
- Published organisation values
- Transparency of corporate governance procedures
- Consulting with customers about changes in products and services, or the service experience
- Transparency about costs (for example when negotiating agreements with industry partners)

⁹ See also Who Do Trust: Improving trust through customer service, Institute of Customer Service, 2021

7) Developing flexibility and innovation to respond to change and create new opportunities

Covid-19 has heightened the importance of flexibility, adaptability and innovation. Many organisations have needed to reconfigure services, reallocate resources, review supply chains and be responsive to changing customer needs and circumstances. Some organisations have deployed virtual technologies to create effective new ways of engaging with customers. Employees have been required to adapt to Covid-19 safety measures, in some cases work and collaborate from home, and take on new roles and responsibilities. Some changes enforced by Covid-19 have led to improvements in productivity and work-life balance but over the longer term may inhibit the development of organisational culture and collaboration.

As organisations plan for hybrid models of working, there will be a need for flexibility and adaptability to find sustainable solutions that work for customers, employees and organisations. The ability to respond effectively to change and create new opportunities requires developing a culture of openness and innovation to generate, qualify, test and operationalise new ideas.



8) Customer satisfaction and employee engagement have become important measures of corporate governance

2020 – 21 has been an extraordinary period for organisations and customers. Sectors like hospitality, tourism, airlines and commercial property have been severely disrupted. Many organisations in the logistics, IT, entertainment streaming sectors and retailers with strong e-commerce capabilities have grown their revenues.

As a result of the impact of Covid-19, conventional finance measures of revenue growth and ebitda alone may not be reliable as current indicators of sustainable business performance. In this context, customer satisfaction, employee engagement and productivity are increasingly important measures of an organisation's performance and sustainability. Embedding these measures into corporate governance will help organisations to maintain focus on their core purpose, evolving customer needs and wider stakeholder and societal impact.



9) A long-term focus on customer service to enable sustained business performance

The UKCSI often shows examples of organisations that achieve short-term improvements in customer satisfaction which are not maintained and subsequently falter. Many organisations face immediate financial pressures which make it difficult to press the case to invest in service, or to resist cutbacks. However, at a time of acute need for many customers, and when the economy is set to recover rapidly, failure to invest in service could be a costly and long-term mistake.

Our evidence suggests that achieving the financial benefits of superior customer satisfaction requires a sustained, long-term focus based on a consistent strategy and understanding of customer needs. The disruption caused by the pandemic means that in the last year some sectors and organisations have suffered sharp falls in revenue whilst others have prospered unexpectedly. In the months and years ahead, organisations that consistently perform better than their sector average for customer satisfaction are likely to be best placed to manage uncertainty and benefit from growth opportunities.

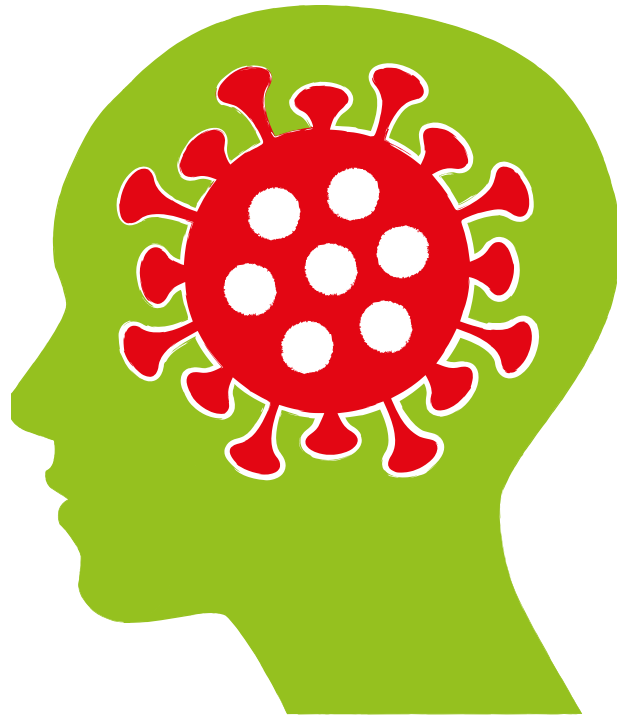


10) Learning the lessons from Covid-19 to prepare better for future shocks

As lockdown restrictions are gradually relaxed and the vaccination programme takes effect, there is growing optimism that the full range of economic activity can resume, tempered by concerns about the ongoing economic impact of the pandemic and the risk of new virus variants.

As organisations consider their future priorities, it could be all too easy to slip back into previous working habits and practices. Now is therefore a critical moment to reflect on and consolidate the learnings gained during the Covid-19 crisis. Organisations need to consider carefully the benefits and disadvantages for productivity, customer satisfaction, organisational culture, employee engagement and business performance of changes in operational arrangements caused by Covid-19.

There is an opportunity to build on unexpected successes, learn from mistakes and create an ongoing culture of innovation and continuous improvement. The Covid-19 crisis was an unexpected shock but the possibility of a pandemic was not entirely unforeseen in government and organisations' risk planning. Future shocks are bound to occur, even if their specific timing and character cannot be reliably predicted. Organisations therefore need to ensure that they have learnt from the experiences of the Covid-19 crisis and will be better prepared to adapt to future shocks and disruption.



UKCSI

Key facts

11

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 2021, 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.

272

Number of individual organisations and organisation types which received a UKCSI rating. 260 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 July 2021 UKCSI

Automotive

Audi
BMW
Citroen
Dacia
Fiat
Ford
Honda
Hyundai
Jaguar
Kia
Land Rover
Lexus
Mazda
Mercedes-Benz
Mini
Mitsubishi
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
Metro Bank
Nationwide
NatWest
RBS
Sainsbury's
Santander
Starling Bank
Tesco
The Co-operative Bank
TSB
Ulster Bank
Virgin Money
Yorkshire Building Society

Insurance

AA Insurance
Admiral
Aviva
AXA
Budget
BUPA
Churchill
Co-op Insurance
Direct Line

Esure
Halifax
Hastings Direct Insurance
Legal and General
Lloyds
LV=

M & S (insurance)
More Than
Nationwide Insurance
Petplan
Privilege
Prudential
RAC
RIAS
SAGA Insurance
Sainsbury's
Swinton
Tesco
Virgin Money

Leisure

Amazon Prime Video
Burger King
Caffe Nero
Costa Coffee
Deliveroo
Domino's Pizza
Greggs
JD Wetherspoon
Just Eat
KFC
Ladbrokes
McDonald's
Nando's
Netflix
Now TV
Pizza Hut
Spotify
Starbucks
Subway
Toby Carvery
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)

Companies House
Disclosure and Barring Service
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
Halfords
Holland & Barrett
Home Bargains
Ikea
John Lewis
M & S
Next
Pets at Home
Poundland
Primark
Screwfix Direct
Specsavers
Superdrug
TK Maxx
Wilko

Services

AA
British Gas Home Services
DHL
DPD
Green Flag
Halfords autocentre
Hermes
Hertz
Homeserve
Kwik Fit
RAC
Royal Mail / Parcelforce
Timpson
Toni & Guy
Uber
Western Union

Yodel
your local solicitor
your local tradesman

Telecommunications & Media

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

Tourism

booking.com
British Airways Holidays
Butlins
Center Parcs
Expedia
Haven Holidays
Hilton
Holiday Inn
Hoseasons
Hotels.com
Jet2holidays.com
Lastminute.com
Marriott
On the Beach
P&O Cruises
Premier Inn
SAGA Holidays
Trailfinders
Travel Republic
Travelodge
Trivago
TUI
Virgin Holidays

Transport

Abellio Scot Rail
Arriva - Bus group
Avanti West Coast
British Airways
Brittany Ferries
CrossCountry
East Midlands Railway
easyJet
Eurotunnel
First Group - bus companies
Gatwick Express
Grand Central
Great Northern
Great Western Railway
Greater Anglia

Heathrow Express
Jet2
London North Eastern Railway
London Northwestern Railway
London Underground
Manchester Metrolink
National Express
Northern / Northern Trains
P&O Ferries
Ryanair
South Western Railway
Southeastern (train operating company)
Southern
Stagecoach (Bus)
Thameslink
The Trainline.com
TransPennine Express
Transport for Wales
TUI Airways
Virgin Atlantic
West Midlands Railway

Utilities

Affinity Water
Anglian Water
Bristol Water
British Gas
Bulb
Dwr Cymru (Welsh Water)
E.ON (energy)
EDF Energy
Essex and Suffolk Water
M & S Energy
Northern Ireland Water
Northumbrian Water
npower
Octopus Energy
OVO Energy
Power NI
Scottish and Southern Energy (SSE)
Scottish Gas
Scottish Power
Scottish Water
Severn Trent Water
Shell Energy
South East Water
South Staffordshire Water
South West Water
Southern Water
Thames Water
The Co-operative Energy
UK Power Networks
United Utilities (water)
Utilita
Utility Warehouse
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 July 2021 UKCSI includes responses from surveys conducted between 14 September to 12 October 2020 and 8 March to 6 April 2021.

45,000 customer responses

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 July 2021 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.

272 organisations received a UKCSI rating

These include 260 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 25 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
- Key issues organisations should improve
- Satisfaction by product type in the Banking, Insurance and Telecommunications & Media sectors

Sub-sector customer experience measures

- Leisure (Quick Service Restaurants; Entertainment)
- 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

Breakthrough research from The Institute



Who Do You Trust? Improving trust through customer service

- Highlights the key factors that influence customers' trust, or can reduce trust in organisations
- Introduces a model of customer trust based on 7 dimensions
- Defines actions and enablers for organisations to build trust in their relationships with customers, employees, suppliers and key stakeholders.



The Procurement Partnership: Developing relationships to deliver excellent customer service through procurement

- Examines how organisations define requirements and evaluate and manage supplier relationships that affect customer experience
- Draws on the perspectives of senior executives, procurement managers, customer experience managers and contractors to give a multi-dimensional view of issues influencing procurement in a service context
- Highlights the “hidden costs” of poor procurement and their impact on customer experience and reputation and identifies 10 key enablers of successful procurement.

To find out more about The Institute's research programme, contact us at:
T: 0207 260 2620



Green Goes Mainstream? Customer service and the green agenda

- Examines the how customer attitudes and behaviours are influenced by the green agenda
- Reviews how organisations are addressing the green agenda through their operations, supply chains and in their engagement with customers and employees
- Identifies key enablers for organisations to incorporate the green agenda effectively in their customer proposition.



Are you connected? Recruiting, developing and retaining the skills for customer service excellence

- Highlights the factors that are shaping requirements for customer service skills
- Defines the key skills needed for customer service, from the perspectives of senior managers, employees and customers
- Examines effectiveness of current practice in recruitment, training and development
- Reviews best practice in engaging and retaining employees
- Identifies 9 key enablers, with practical recommendations, for recruiting, developing and retaining the skills for customer service excellence.

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
www.instituteofcustomerservice.com

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