

## Customer Power Coverage: How, Who and What?

### How?

- Customer Power is conducted online, via the Toluna panel.
- It has been running since 2012, typically with two waves in a calendar year.
- For 2016, these will be March/April and September/October.
- Each wave we interview between 4000 to 5000 consumers in total.

### Who?

- The consumers are customers of different categories and brands.
- At the outset of the survey we verify that they are a customer in each category, and then we ask them to choose their only or main provider/brand in each category from a list. Further details are given in the What? Section.
- Results are weighted to be nationally representative of the general population in the UK.
- Standard demographics are age, gender, region and social class.

### What? Sector/Category Coverage

Customer Power covers 11 sectors and we achieve approximately the following sample sizes per wave:

 Banking 4,100	 Credit Card 2,700	 Pay TV 2,500	 Hotels 2,400
 Car insurance 2,700	 Energy 2,700	 Broadband 3,500	 Supermarkets 4,100
 Home insurance 2,800	 Mobile operator 3,700	 Airlines 1,800	

### What? Brand Coverage

Some categories are broader than others in terms of the competitive landscape and therefore the brands that can be selected. The brands listed here are those with a base size of at least 50 per wave for the key relationship and brand metric questions; most have over 100 (based on wave six 2015). Due to the way we ask different sections of the survey there are some differences in sample sizes for different questions and base sizes for the attribute and channel questions may be lower. We are happy to share more specific details on request.

## What? Brand Coverage (Continued)

The following brands are covered within the related industry sectors of our Customer Power reports. Those marked with an “\*” currently have a base size of 50-100 customers, the rest have over 100. Visit our website for further details of Customer Power and pricing information.



### Banking

Bank of Scotland\*, Barclays, First Direct\*, Halifax, HSBC, Lloyds, Nationwide, NatWest, RBS, Santander, The Co-operative / Smile\*, TSB



### Car Insurance

The AA\*, Admiral, Aviva, AXA, Churchill, Co-operative\*, Direct Line, Hastings, LV, MORE THAN\*, RSA\*, Saga, Swinton, Tesco\*



### Home Insurance

The AA\*, Aviva, AXA, Barclays\*, Churchill, Co-operative\*, Direct Line, Halifax, Legal & General, Lloyds, LV, MORE THAN\*, Nationwide\*, Saga, Santander\*, Swinton, Tesco\*



### Credit Card

American Express, Barclaycard, Capital One, Halifax, HSBC, Lloyds, M&S, MBNA, Nationwide, NatWest, Sainsbury's\*, Tesco



### Energy

British Gas, EDF Energy, E.ON Energy, First Utility, Npower, Ovo Energy\*, Sainsbury's Energy\*, ScottishPower, SSE



### Mobile Operator

EE, giffgaff\*, Orange, O2, Virgin Mobile, Tesco Mobile, TalkTalk\*, T-Mobile, Vodafone, 3 (Three)



### Pay TV

BT TV, Sky, TalkTalk, Virgin Media



### Broadband

BT, Orange/EE, PlusNet, Sky, TalkTalk, Virgin Media



### Airlines

British Airways, EasyJet, Emirates, Monarch\*, Ryanair, Thomas Cook Airlines, Thomson Airways, Virgin Atlantic\*



### Hotels

Best Western, Crowne Plaza\*, Hilton, Holiday Inn, Holiday Inn Express\*, Ibis\*, Marriott\*, Premier Inn, Radisson\*, Travelodge

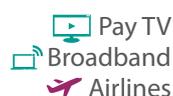


### Supermarkets

Aldi, Asda, Co-op, Lidl, Marks & Spencer, Morrisons, Ocado\*, Sainsbury's, Tesco, Waitrose

## What? Survey Question Areas - overview

1. **Qualification** - Products/services held or used and main providers in different categories



2. **Customer Relationship & Brand Metrics**



Harris Relationship Score Metrics.



Harris Brand Energy Metrics.



Net Promoter Score.



3. **Customer Experience**



Service, product and communications experiences.



Channel usage & satisfaction. (New for 2015)



How customers feel. (New for 2015)

Customers rate the only or main brand in all 11 sectors for section 2. To manage survey length, they then rate 3 to 4 brands/providers in 3 to 4 different sectors in section 3. NEW for 2016, they also rate 3 to 4 brands on brand relevancy and vitality brand measures.

# What? Survey Question Areas - detail

## 1. Qualification Questions

At the outset of the survey, each respondent is asked the following questions to make sure they qualify to participate. All respondents are also from the UK and aged 18 or over.

Which of the following products and services do you hold or are you a customer of? [asked of most sectors]

Who in your household does most of your supermarket food, drink and household shopping? [supermarket only]

Which of the following have you done in the last year? Chosen and booked and stayed in a hotel? Chosen and booked and taken a flight? [hotels and airlines only]

Then for each sector we ask which provider they have main relationship with. In a category where an individual may have multiple providers we ask about the main one for personal use e.g. bank accounts, mobile operator etc. For supermarkets, hotels and airlines we ask which brand they choose and use most often. Respondents then only rate the survey questions for one provider per category/sector.

## 2. Customer Relationship & Brand Metrics



Harris Relationship Score Metrics.



Harris Brand Energy Metrics.

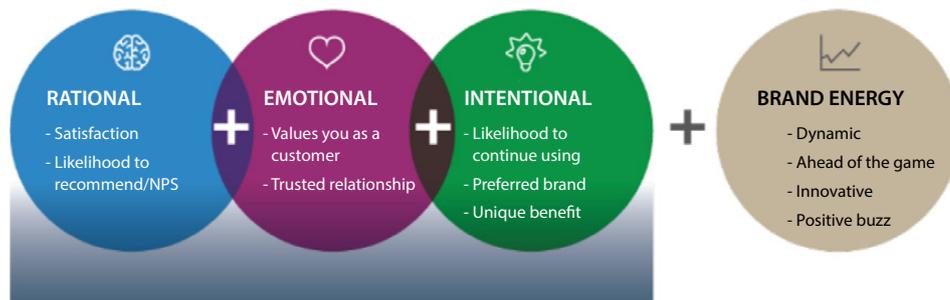


Harris Relationship Score Metrics.



hi brands.

We ask customers to rate the performance or agreement on range of proprietary Harris metrics, using a semantic 5 point scale e.g. poor to excellent or completely disagree to completely agree. NPS is asked in the usual format on a 0 to 10 scale.



From the relationship score metrics, we calculate how connected a customer is with each provider and allocate them to one of four categories, post survey:



We also calculate the three NPS segments; Promoters, Passives and Detractors, for those who use the NPS metrics.

New for 2016 we have included hibrands relevancy and vitality brand measures to provide a forward looking measure of brand sustainability through the eyes of your customers.

## hi brands™ – A MODEL TO MEASURE BRAND SUSTAINABILITY



## What? Survey Question Areas - detail (Continued)

### 3. Customer Experience



#### Service, product and communications experiences.

We ask customers to rate how well providers deliver different elements of the experience, using a 5 point performance scale of poor to excellent. In the most current wave there are over 20 attributes including the role of staff, issue resolution, communications clarity and flexibility, product/content relevance and innovation, fees/prices and service engagement elements like understanding needs and treating customers fairly.

Five of the attributes are highly associated with being easy to do business with and feed into the Harris Adapt; Ease ranking. Eight are highly associated with personalisation and feed into Harris Adapt: personalisation ranking. We are happy to show specific content through a demo of our online portal.



#### Channel usage & satisfaction.

We ask which ways an individual has interacted or communicated with a provider in the last 12 months including a mix of traditional and new channels. Phrasing has been adapted to ensure it is relevant to category/sector. These cover personal contact with staff, phoning a physical outlet or call centre, online, mobile and social media services, and letter/post.

For all interactions that are relevant to an individual we then ask them to rate how satisfied or dissatisfied they are (a 5 point scale from completely satisfied to completely dissatisfied) with each one.



#### How customers feel.

At the end of the survey we ask customers to:

- Select positive or negative words and phrases that best explain the nature of the relationship they have with providers e.g. hassle free, open and honest, better the devil you know or distant, impersonal, they take advantage of me and so on.
- Select positive or negative words that explain how a provider makes them feel e.g. supported, happy, optimistic or resentful, powerless, or neglected and so on.

### How can I find out more?

To find out more about how you can benefit from Customer Power, contact your Harris account manager, or Harris Customer Power lead Debbie Senior at [dsenior@harrisinteractive.co.uk](mailto:dsenior@harrisinteractive.co.uk).