

2023//

INMOMENT + NPSx BY BAIN & COMPANY CONSUMER STUDY



# State of CX: 2023 UK Consumer Study



+



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# Key Findings

- Across all industries only a handful of large UK brands (~top 10%) in Auto, Media and Financial Services have made it into the 'over +40' range on NPS
- On average, UK Industries have an average NPS of +12, ranging from +35 for Automotive to -18 for Water Services
- 'Product Quality' and 'Innovation' are the most important drivers of loyalty, closely followed by 'Value' and 'Ease of Getting Help'

PG #03

Executive Summary /  
About the Study

PG #40

What Should NPS  
Laggards Focus On?

PG #05

What Are the Top  
Industries & Brands in  
the UIK in 2023?

PG #43

Key Takeaways

PG #13

How Has NPS Score  
by Industry Changed  
Since 2019?

PG #46

Next Steps

PG #16

What Are the  
Drivers of NPS?

PG #48

About the Authors

PG #18

What Differentiates  
the Best Brands?

PG #50

Who Did We Talk To?

PG #23

Where Is Innovation  
Most Impacting the  
Experience?

PG #52

Brands Included

PG #33

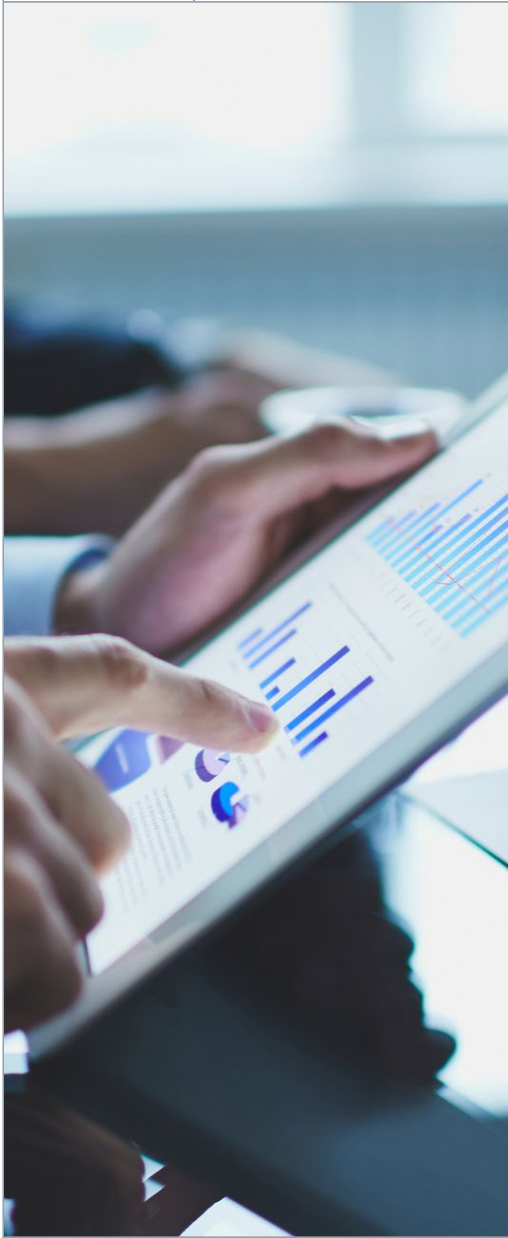
Product Quality Versus  
Value Propositions

PG #55

Contact Information

PG #37

Making It Easy For  
Consumers to Get the  
Help They Need



# Executive Summary

We are pleased to share that **InMoment**, in partnership with **NPSx**, have launched a new research report on the **State of CX** for UK Brands in 2023.

## Premise of the Report:

We were keen to understand how consumers are feeling about their experiences following Covid-19 and in the midst of challenging economic times. With input from over **32,000 consumers**, we have conducted a comprehensive research study to understand the state of play across **199 UK consumer brands**.

## What Can Be Found in the Report:

This study provides a raw, customer-driven perspective on how well certain brands are performing. It underscores the importance of sticking to your value proposition and striving

to deliver the best for your customers. It demonstrates the impact of various NPS drivers within categories, even within challenging industries like energy. We will give you insights into the leaders across the UK consumer brands—outlining who is winning and why.

## Why You Should Read the Report

Part of the report will cover cross-industry tips and inspiration to encourage a broader perspective and foster innovation. Quite often, brands tend to look quite rigorously at their own industry, by understanding the performance changes in various industries and the drivers of NPS, you can adapt your strategies to meet evolving customer needs and expectations.



# About the Study

## TIMING OF THE STUDY:

The study was conducted 2023

## OBJECTIVE OF THE STUDY:

To identify NPS leaders in each sector but also innovation and channel experience leaders

## STUDY COVERAGE:

Final data covers 32,922 respondents across 14 industries and 199 UK brands

## INDUSTRIES COVERED:

Telco, Media, Social Media, Retail, Market Place, Grocery, Financial services, Insurance, Airlines, Hotels, Automotive, Restaurant/Café, Energy & Water

## SURVEY DESIGN



Demographics Screener included to enable demographics sample adjustments (age, region, and gender).



Each respondent was presented with 5 Industries, in a randomized order and selected on a least fill basis. Within each of these 5 Industries, asked which brands encountered.



Each respondent was then presented with 2 Industries, on a least fill basis, with up to 3 Brands per Industry. Brands were randomised and selected on a least fill basis (where applicable (Maximum Brands per respondent = 6, Minimum Brands per respondent = 1)



NPS was chosen as the benchmark metric, as it's a commonly accepted and industry standard measure of customer loyalty and engagement. The question used was: "How likely are you to recommend Brand X to friends or family?"



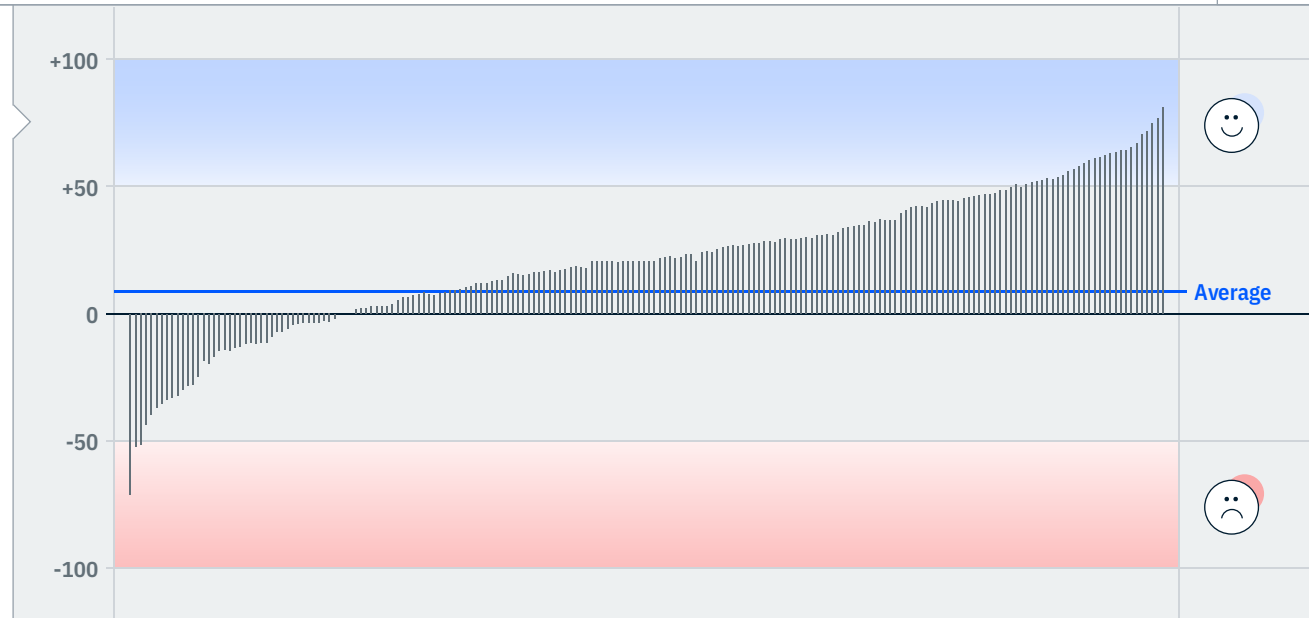
Product question asked for Telco, Financial services, Insurance only, as the different brands within these industries have very different product offerings, which may influence their proposition and the experience they offer customers. For instance, some insurers only offer health insurance, whereas others, provide a full range of products across car, home and life insurance.

# What Are the Top Industries & Brands in the UK in 2023?



## 2023 Consumer NPS Benchmarks by Brand

On Average, UK Brands have an average NPS of +13, with Volvo leading at +55.



At a brand level, the average NPS is +13, which is a slight increase from +10 in 2019. However, compared to the 2019 study, the leading brand's score has dropped significantly. In 2019, the top brand had an NPS of +70, whereas in the current study, Volvo leads with an NPS of +55, showing a decline in the overall leader score.

Luxury automotive brands, including Volvo, hold most of the top spots in terms of NPS. Volvo has improved by 6 points since 2019. Retailers and grocers also have multiple brands in the top 20 rankings.

In the mid-pack, there are brands that do not stand out significantly from their competitors and are neither leaders nor laggards in their respective industries. This category includes well-known high street brands such as Starbucks, Vodafone, Fiat, Sainsbury's, Holiday Inn, and H&M.

Laggard brands are primarily concentrated in the energy supplier, water services, and financial services sectors. These industries have a high impact on respondents' cost of living and tend to have lower NPS scores.



# 2023 Consumer NPS Benchmarks by Industry

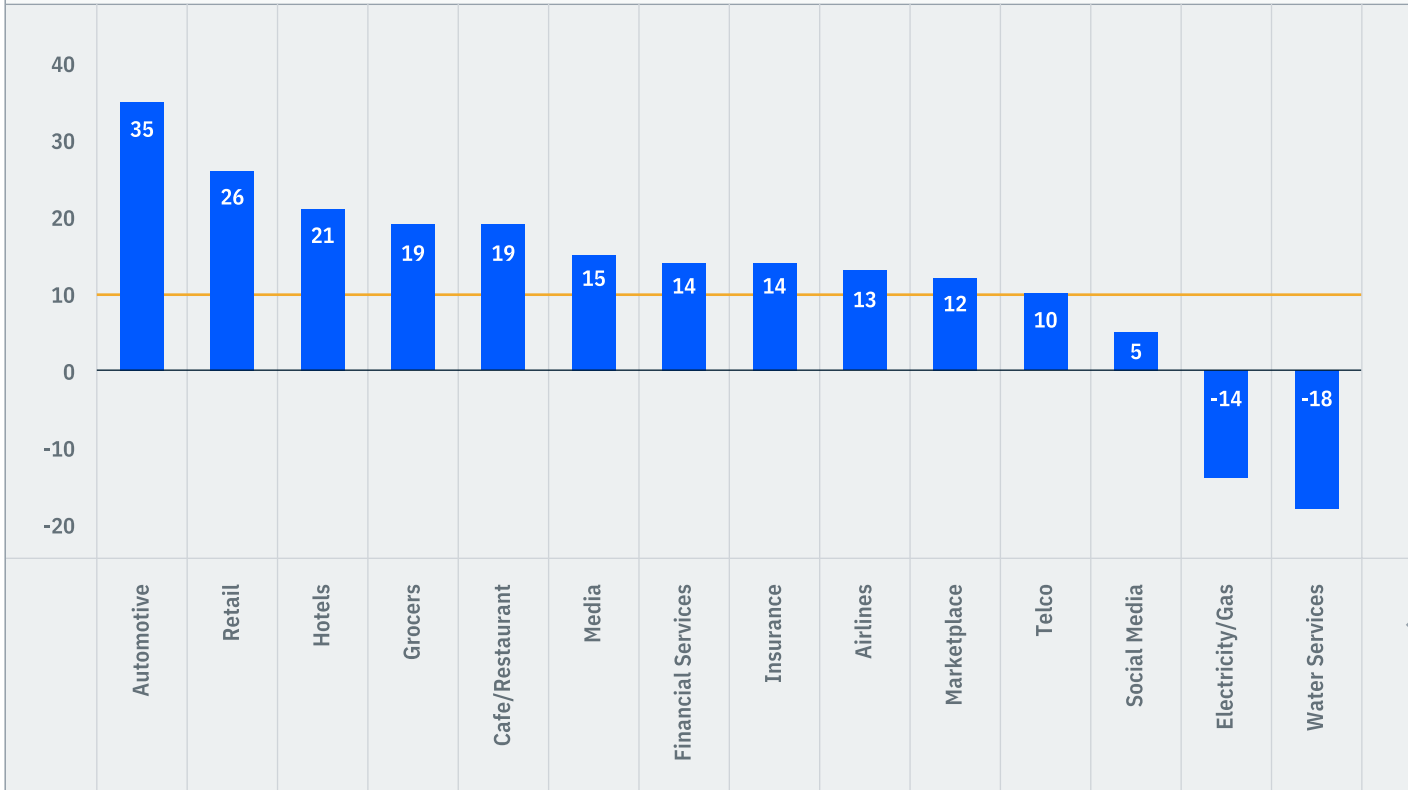
On Average, UK Industries have an Average Industry NPS of +12, Ranging from +35 for Automotive to -18 for Water Services.

- The average across brands is +13
- The average across respondents is + 14

This graph shows the average NPS across industries. At an industry level the average NPS is +12. The top end of industries include automotive, retail and hotels.

Within the middle of the pack with moderate performance are restaurants, media, financial services and insurance.

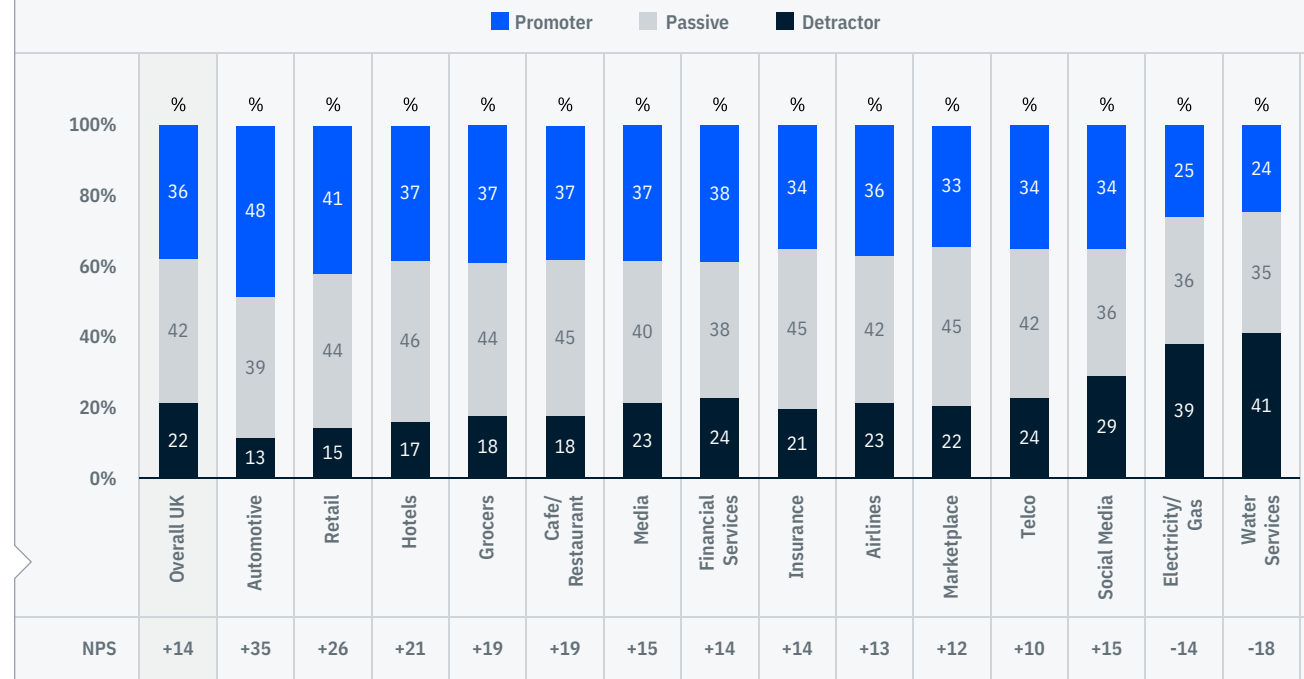
Bottom end are the utility companies, where consumers have less choice in provider, and it may be seen more as a necessity. There have also been large price increases in the past year which could influence their brand image. In the upcoming analysis we will explore why these industries scored the way they did.





## NPS Segments by Industry

Financial Services is a particularly polarised industry, with fewer passives than other mid-table industries



Looking at the percentage of promoters, passives and detractors within each industry provides us with more insight into where brands can drive improvements to increase customer satisfaction and loyalty.

Automotive really stands out in terms of the number of promoters. The high percentage of promoters in the automotive industry can be attributed to several factors. First, automotive companies often invest heavily in product quality, innovation, and value, which resonates

positively with customers. Consumers in this industry may also have more choices and options to suit their preferences, leading to a more positive overall experience. Additionally, the purchase of an automobile is usually considered a significant and discretionary expense, which means customers are more likely to share positive feedback when they are satisfied with their purchase.

CONTINUED ON NEXT PAGE





**On the other hand, utility providers, particularly in the electricity and gas sectors, have a lower percentage of promoters.** This is likely due to consumers having limited choices when it comes to selecting a utility provider, making it more difficult for them to switch to a more satisfying option if they are dissatisfied. Additionally, with the recent price increases in these sectors, consumers may be experiencing financial strain, leading to lower overall satisfaction and NPS scores. The essential nature of these services also means that customers may have higher expectations for quality, customer service, and environmental responsibility, which utility providers may struggle to meet.

They also had very low scores around quality, innovation and being socially and environmentally responsible. In fact, a lot of the respondents spoke about environmental issues being top of mind but also customer service levels being important.

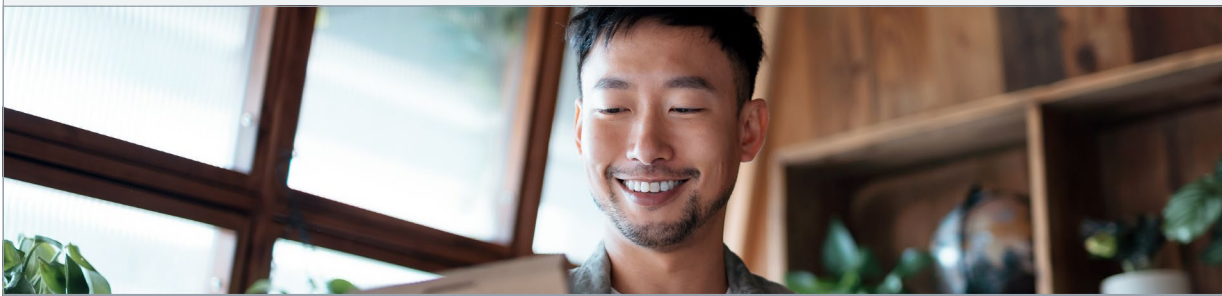
**The financial services industry stands out with fewer passives compared to other industries,** indicating more polarised views.

This could be due to the diverse range of financial products and services offered by different companies, leading to varying customer experiences and opinions. Some customers may have positive experiences, leading them to become promoters, while others may have negative experiences,

becoming detractors. This polarisation may stem from factors such as the specific services used, the effectiveness of customer service, and the overall performance of the financial institution.

**Social media is very different,** with feedback around the quality of the apps, but also the toxic and addictive environment social media can create.

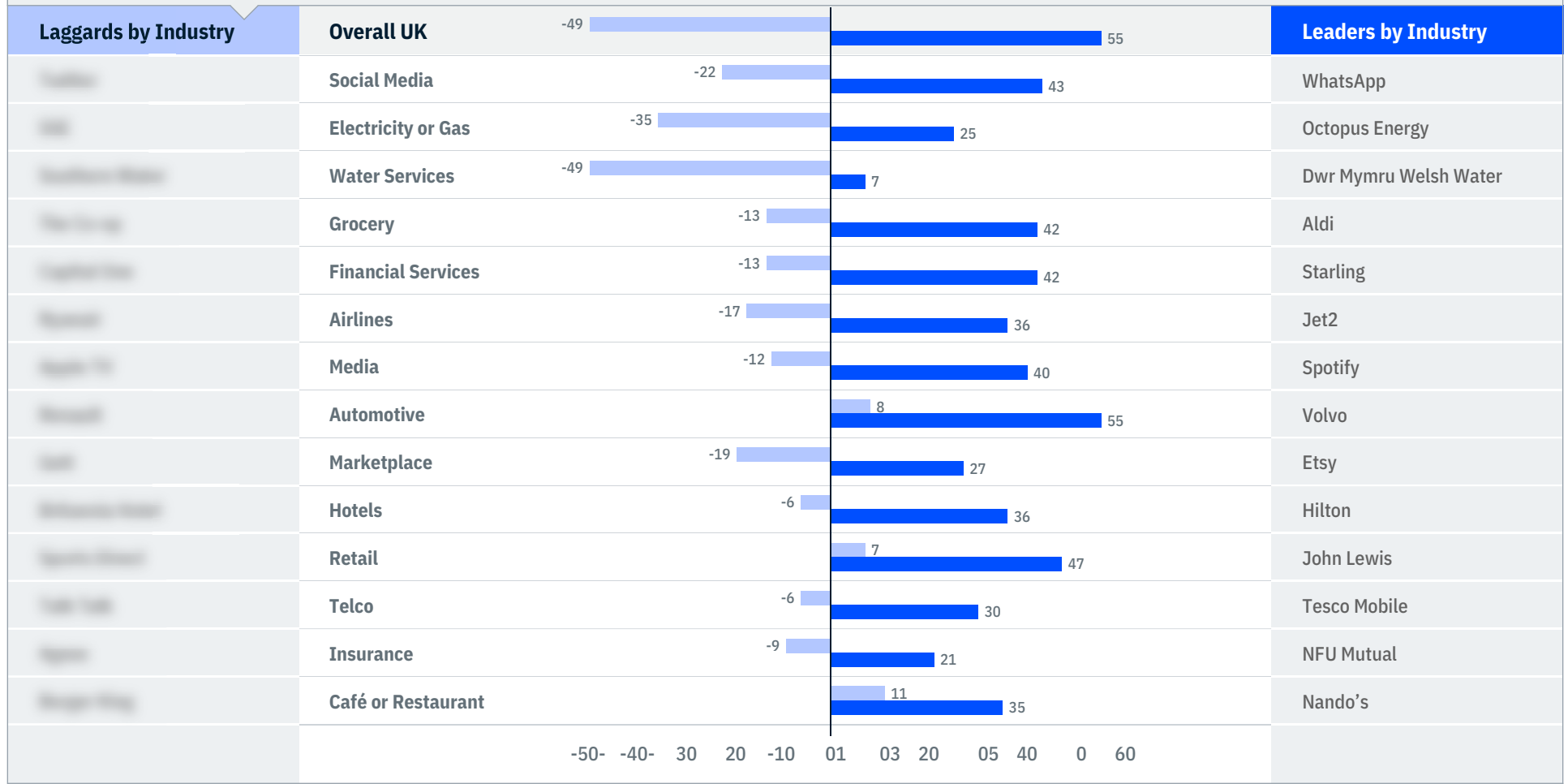
**Industries like hotels, insurance marketplaces, and cafes/restaurants have a higher percentage of passives.** This suggests that customers in these industries have an okay or good experience but may not be particularly impressed or delighted. These industries have an opportunity to convert passives into promoters by offering unique, wow experiences that stand out from competitors and leave a lasting positive impression on customers.





# NPS Range by Industry

Social Media and Electricity or Gas Providers Are the Most Diverse Industries in the UK in Terms of Advocacy, with Cafes or Restaurants the Least Diverse.





**I**n terms of the range of NPS scores across industries, **it's interesting to note that the leaders and laggards are not necessarily the biggest players in terms of market share.** There can be over a 100-point difference between the leader and laggard brands. Industries with a high range of scores indicate that different brands offer very different experiences to customers. This can be influenced by the unique propositions each brand brings to the market. In each category, there are notable leaders who excel in delivering unique product offerings and customer experiences.

**Standing out amongst these are cafe/restaurants who rank second in terms of**

**great product quality and insurance who ranks top for making it easy to get help when needed.**

Within automotive and retail industries for instance respondents score highest for product quality, innovation and value. For example, Aldi is a fast-growing brand in the grocery industry that focuses on a low-cost/budget proposition, setting them apart from more traditional grocers like Sainsbury's or Asda. In the telecommunications industry, Tesco Mobile leads and has received awards for its customer service. Starling Bank, a mobile-first bank, stands out in the financial services industry with its focus on digital innovation, transparency, and proactive communications through their app. NFU















Mutual is an award-winning brand focused on positive improvements for their members in rural communities and the environment.

Different media brands also provide diverse experiences. Spotify is mentioned for its wide range of content and choice, while Apple is perceived as expensive and catering to a specific segment of consumers with Apple devices. On the other hand, industries like cafes/restaurants and insurance tend to provide a more consistent customer experience, resulting in a smaller range of scores.

Overall, there is significant variation in NPS scores across different industries, highlighting the diverse experiences customers have with various brands.



## LEADING THE WAY

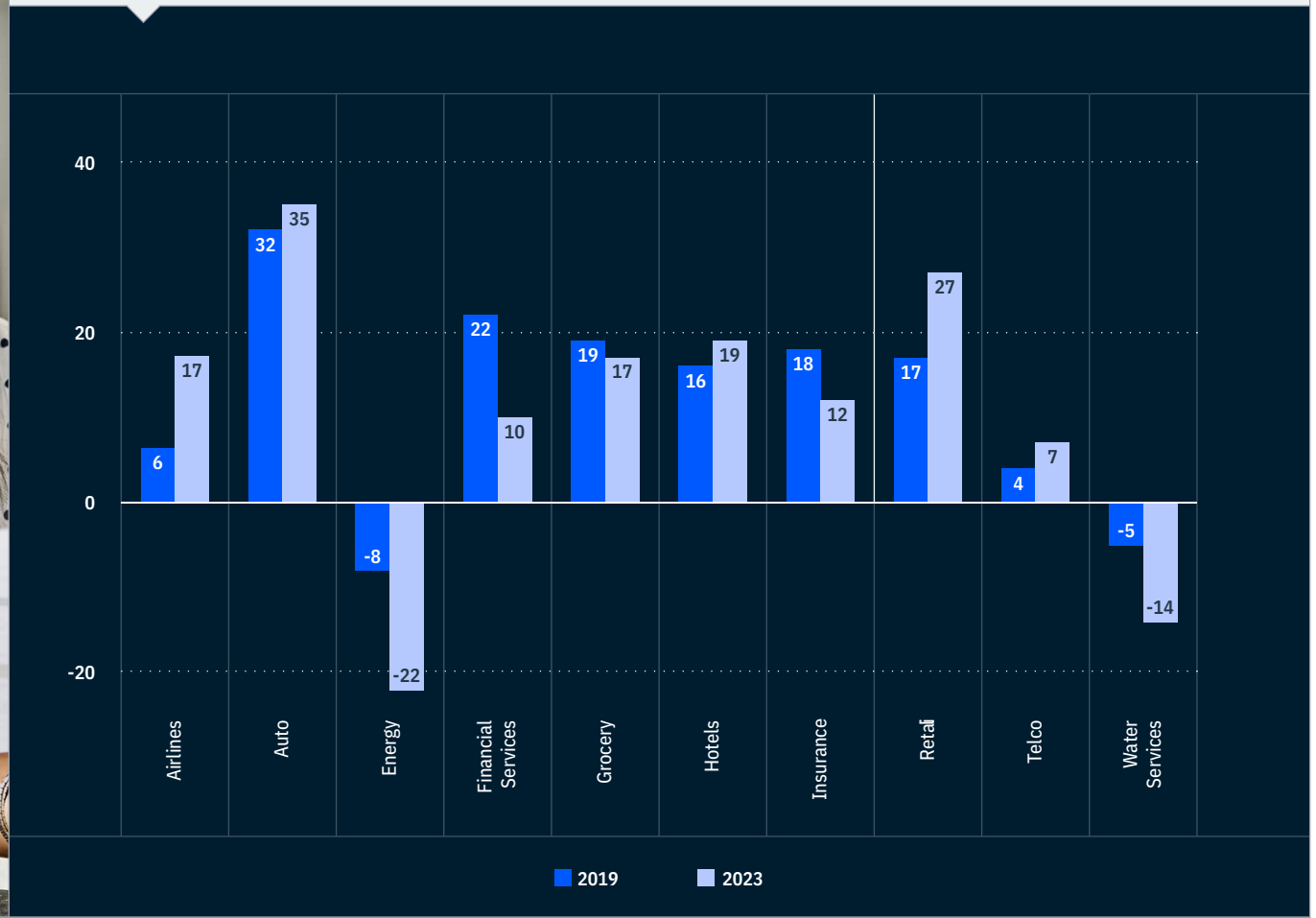
MARKETPLACE	ENERGY	INSURANCE	WATER	AUTOMOTIVE	RESTAURANT	AIRLINE
						
HOTEL	SOCIAL MEDIA	MEDIA	RETAIL	GROCERY	BANKING	MOBILE
						

# How Has NPS Score by Industry Changed Since 2019?



# Industry Cohort Comparison 2019-2023

Industries Included Were Measured in Both the 2019 and 2023 Study



**STUDY**

**F**or this study we were able to analyse the performance of the same cohorts of brands across different industries between 2019 and 2023. One notable finding is the crisis that the energy companies are experiencing. Consumers have observed these brands posting record profits while also increasing the cost of energy, leading to a perception that they may not be truly customer-focused despite their financial success.

In the financial services industry, the traditional incumbents and startups, like First Direct and Metro, that were leading the pack in 2019 have seen some decline in their performance. On the

other hand, fintech companies like Starling and Monzo have emerged as leaders, setting a new standard for customer experience in financial services. Traditional high street banks have also made strides forward, catching up to the innovative fintechs.

The retail industry, along with airlines, has shown positive growth. The airlines' bounce-back can be attributed to the recovery from the impact of Covid-19, which was not accounted for in the 2019 study. Retailers, especially fast-fashion brands, have been focused on enhancing the customer experience, benefitting from a slightly more positive outlook than in 2019.

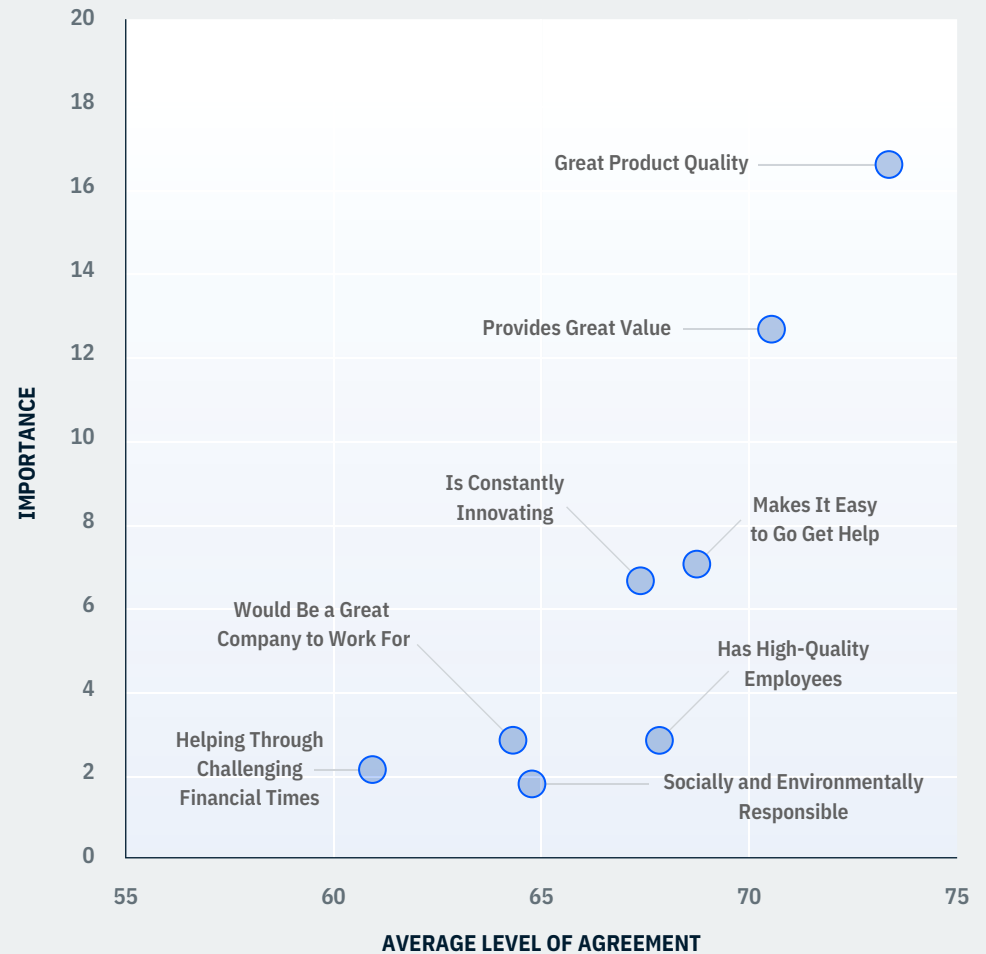
# What Are the Drivers of NPS?





The drivers of Net Promoter Score (NPS) help us understand what factors contribute to customer loyalty. The main drivers of NPS, as revealed by the data, are [product quality and great value](#). This is not surprising, especially during times of economic turbulence when customers are seeking to make their money go further. Consumers prioritise brands that offer high-quality products and good value for their money. Another interesting finding is [the importance of making it easy to get help](#), which is the third most important driver of NPS. During challenging times, customers appreciate brands that provide assistance and support when needed. Lastly, [innovation is identified as a relatively important driver of NPS](#). This suggests that customers are still intrigued and engaged by brands that demonstrate an ability to deliver new and innovative solutions.

These drivers provide insights into how brands are performing and are further explored in this report. It's important to note that these drivers are relative rankings and not an indication that certain drivers are unimportant.



Driver analysis determines the relative importance of key drivers in influencing NPS Score Average level of agreement (score between 1-100) to driver questions

Source: Based on a study of 32,922 respondents across 199 UK Brands

# What Differentiates the Best Brands?



# NPS Benchmarks

Across all industries only a handful of large UK brands (~top 10%) in Auto, Media and Financial Services have made it into the 'over +40' range on NPS

+30				

+40			

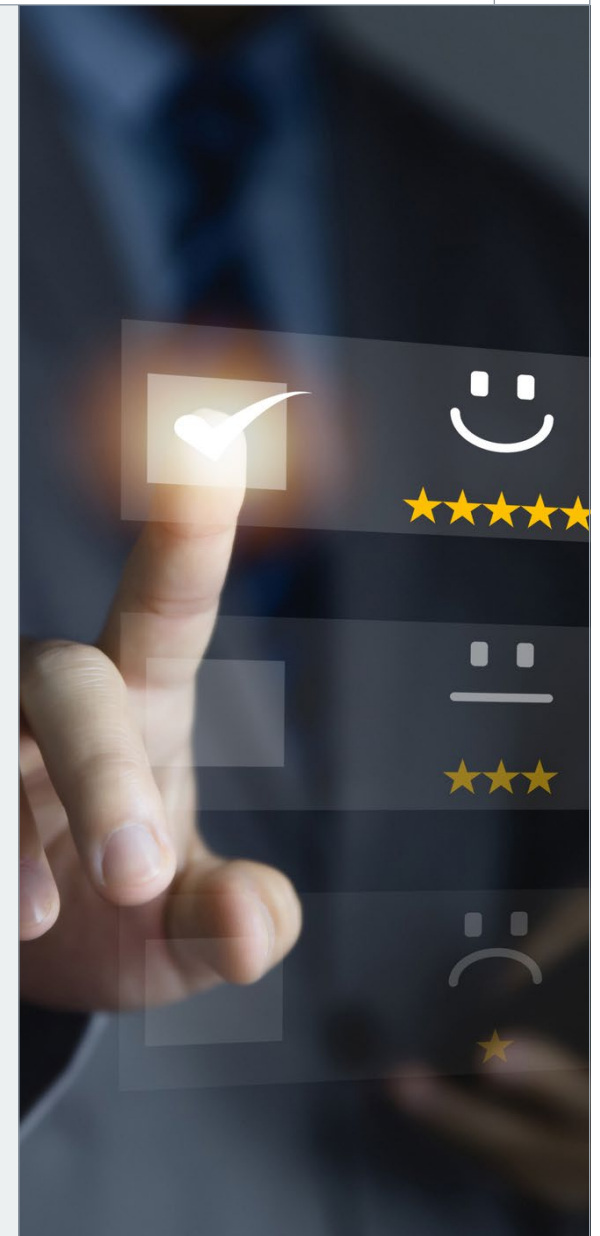


To summarise we are showing the leaders or top brands have NPS scores over 40. While the specific scores are less important, the breadth and shape of the differential are significant. The brands with an NPS over 40 are often growing faster, gaining more market share, and making waves in the industry. Examples like Aldi and Starling demonstrate their ability to innovate and deliver great experiences.

In analysing the brand level data, we can observe an interesting story between categories and individual brands. While certain categories may perform well overall, there is often only one brand within that category that stands out as the leader. For example, in the automotive industry, although it leads in four out of the eight drivers, only one auto brand tops the chart. This indicates that brands within a category can have varying levels of success in delivering exceptional experiences.

However, there is also a category not shown here but will be explored in the report. These are the industries where no single brand achieves an NPS score over 30. Despite the low average NPS for the industry, there is usually a strong leader within that category. Octopus Energy is cited as an example, as they are the only energy brand with a positive NPS. Their NPS is 39 points higher than the industry average. The key takeaway is to learn from leaders like Octopus Energy and apply those learnings to your own business, even if you operate in a similarly challenging industry.

By looking beyond your own industry and seeking inspiration from brands facing similar challenges, you can gain valuable insights and discover tips and tricks that can help you stand out. The report will cover cross-industry tips and inspiration to encourage a broader perspective and foster innovation.





# Range by Driver / *Brand with Brand Leader*

Looking at the Most Highly Scored Brand for Each Driver

## Agreement Level of Agreement by Brand

## Brand Leaders by Driver





**T**he success of brand leaders like Aldi, John Lewis, and Tesla can be attributed to their ability to align their brand promises with the experiences they deliver to customers.

Aldi's focus on great value resonates with customers, especially during challenging times when they can rely on the brand to provide high-quality products at affordable prices. John Lewis stands out with its emphasis on partnership and exceptional service, which creates a strong emotional connection with customers. The reaction and loyalty towards John Lewis, despite discussions about changes in its partnership model, highlight the significance of the brand's people-centric approach.

In the automotive industry, it is interesting to note that only one brand features in the top rankings, despite having leadership

in multiple NPS driver categories. This suggests that there may be an industry halo effect where certain aspects of the automotive industry overshadow the performance of individual brands. However, Tesla stands out as the leader in environmental and social responsibility, showcasing its commitment to sustainability and resonating with consumers who prioritise eco-friendly practices.

The key takeaway is that brands need to not only communicate their brand promises but also consistently deliver on them through exceptional customer experiences. Brands that successfully align their promises with their actions can build strong connections with customers and differentiate themselves in the market.

# Where Is Innovation Most Impacting the Experience?



## Top 10 Innovative Brands

All respondents were asked:



“Which one company do you think is the **most innovative brand** in the whole of the UK?”

#01

Amazon

#06

Virgin

#02

Apple

#07

Tesla

#03

Dyson

#08

Aldi

#04

Tesco

#09

Marks &amp; Spencer

#05

Sky

#10

Google

“They always have **good prices**, great stock of many many items, easy to trawl through their webpage and have **various delivery prices** to choose from.”



“Apple have created a huge range of products like apple watch, they make a new iphone every year and keep on **innovating new things** and updating their software.”

“All of their products are **revolutionary** and so **efficient** at what they do. They all employ the latest practical technology.”





All respondents were asked which one company they thought is the most innovative. All of the brands in the top 10, except for Dyson, were included in the study.

None of the leaders here will be a surprise!

**Amazon** has revolutionised the retail industry by popularising and expanding online shopping. Amazon prioritises customer satisfaction, consistently focusing on improving the customer experience by offering a wide selection of products, competitive prices,

and convenient shopping & delivery options. Amazon has a strong track record of introducing innovative technologies and services. They have expanded beyond traditional retail to for example, Amazon Web Services (AWS) revolutionising cloud computing by providing scalable and cost-effective solutions for businesses.

**Apple** places a strong emphasis on design, developing products that are visually appealing, and user-friendly. They prioritise the user experience in product development, in order to













create intuitive and easy to use products. Apple has created multiple interconnected devices and software, and services, including the iPhone, iPad, Mac computers, Apple Watch etc.

**Dyson** focuses on revolutionary product design, their vacuum cleaners and fans, have distinct and visually appealing designs that set them apart from traditional counterparts. Dyson invests heavily in research and development to create cutting-edge technologies and products with an emphasis on performance.



## Innovative Brands - Sustainability

Within the brands listed by respondents, are an interesting selection of sustainable & environmental offerings sold direct to consumer or through other retailers.

WILD	WHO GIVES A CRAP	VINTED	THIS
			
LUSH	SPLOSH	TOO GOOD TO GO	OATLY
			
TROPIC SKINCARE	SMOL	OLIO	BEYOND MEAT
			

Source: Based on a study of 32,922 respondents across 199 UK Brands



**A**lthough less responses than the leaders, also included in the responses were a range of sustainable brands. These covered a range of offerings, from personal care products, household cleaning, reuse and recycling to vegetarian/vegan food.

These brands prioritise environmental conservation and adopt innovative practices that reduce energy consumption, minimise waste generation, and promote responsible sourcing. Sustainable brands often incorporate social responsibility into their business, to improve labour conditions within suppliers, ensure fair wages, and support local communities.

Through innovative approaches to supply chain management and responsible sourcing, they work towards creating a positive social impact.





STARLING BANK

The financial sector has been undergoing significant digital transformation with customers seeing increased availability of digital banking services, mobile apps, and online platforms that offer convenient and seamless experiences.

A reflection of this is Starling, Monzo and First Direct are leaders in this sector, with easy-to-use apps.

Starling has also focused on current accounts only.



Ikea has focused very much on a culture of entrepreneurship and is known for being an innovative challenger and thinking differently.

This enables them to offer unique products and a strong brand identity.

They have also embraced a seamless Online and Offline experience with in store, online and click and collect options.



Aldi has successfully targeted a particular segment of the market, of shoppers prepared to trade low prices (coupled with sound product quality) for a variety of conveniences offered by traditional supermarkets.

Although it now offers click and collect in concentrates on in-store experiences rather than delivery.



**They give the consumer something different. Very good at giving different ideas such as how to use small spaces, storage ideas etc.**





STARLING BANK



It's not always about doing the same thing as everyone else but rather about consistently delivering on your chosen path and excelling in the customer experience. We want to call out Ikea here. While Ikea may not be the top performer in the overall retail industry (that distinction goes to John Lewis), it leads the pack in terms of innovation among all 200 brands. Ikea's success stems from its unique approach to challenging conventional norms, such as the belief that consumers only buy pre-made furniture. Their introduction of flat pack furniture to the mass market was a groundbreaking move that combined innovative product design,

packaging, and affordability. In fact, they have even inspired a behavioural science term known as the "Ikea effect," which highlights our tendency to value things more when we have participated in their construction.

When it comes to innovation, Ikea has ventured into technologies like augmented reality (AR) and the Metaverse that allows users to virtually place their furniture in their homes. However, their true strength lies in their ability to cater to the demands of the current era. They prioritise affordability and sustainability, offering a brand experience that is both innovative and cost-effective. Moreover, Ikea understands the importance of

creating highly orchestrated experiences for their customers, making shopping in their stores a unique and memorable event. Furthermore, the brand underwent a significant transformation of its e-commerce experience, particularly since 2019. This shift was likely influenced by the pandemic and resulted in a greatly improved online platform, including convenient click-and-collect options.

In essence, Ikea exemplifies a brand that was built for the current times. Their focus on affordability and sustainability aligns with the evolving needs of consumers. The brand continues to innovate and adapt, making it a standout player in the retail industry.



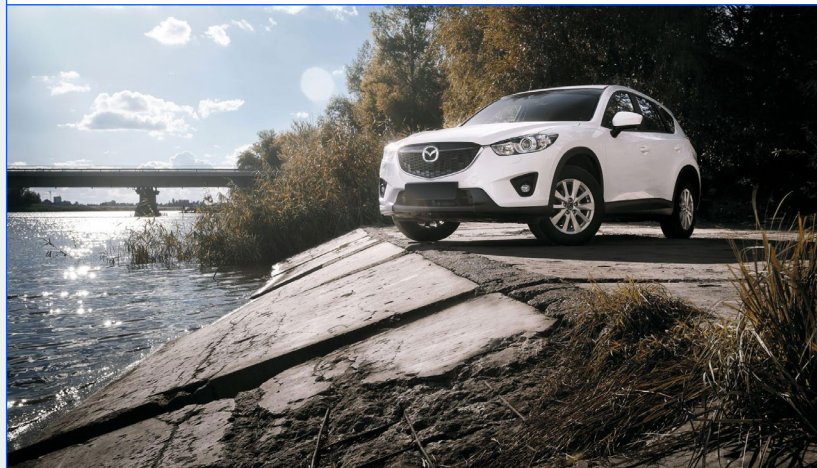


CASE STUDY

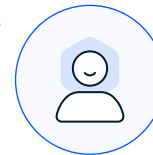
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### Automotive Industry Innovations

The automotive industry leads the way in 4 out of the 8 Drivers including quality of the employees / great place to work, and most strikingly “Product and Innovation”

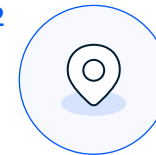


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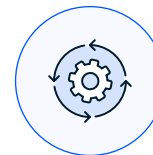
Personalised Experiences

2



Seamless Online/Offline Integration

3



Enhanced Digital Touchpoints

4



Subscription Based Models

5



Electric Vehicle (EV) Focus

6



Enhanced After-Sales Support



## CASE STUDY / AUTOMOTIVE INDUSTRY INNOVATIONS (CONTINUED)

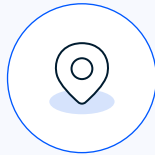
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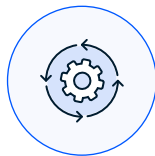
**Ability to Have a Role in Design:** Customers appreciate the opportunity to have a say in the design of their products. In the automotive industry, this translates to allowing customers to personalise their cars by choosing different features, colours, and functionalities according to their preferences.

2



**Virtual and Onsite Showrooms:** Automotive brands are increasingly using digital technologies to enhance the customer journey. This includes virtual showrooms where customers can explore and interact with cars online, as well as traditional onsite showrooms for a hands-on experience.

3



**Increased Usage of Digital Technologies:** The automotive industry is leveraging digital technologies throughout the customer journey. This includes mobile apps for ongoing communication with customers, providing updates, offering maintenance reminders, and facilitating a seamless ownership experience.



## CASE STUDY / AUTOMOTIVE INDUSTRY INNOVATIONS (CONTINUED)

3 / 3

4



**Subscription Models:** Subscription-based models are gaining traction as an alternative to traditional leasing or ownership. Brands like BMW have introduced subscription options that offer customers flexibility in tailoring their car usage based on their needs and preferences.

5



**Electric Vehicles (EVs):** With the growing focus on sustainability, the adoption of electric vehicles presents both challenges and opportunities. Brands are investing in developing the necessary infrastructure and technology to support the transition to EVs and offer customers a different driving experience.

6



**Enhanced After-Sales Support:** Proactive after-sales support is becoming increasingly important. This includes features like remote diagnostics, maintenance reminders, and MOT service reminders, ensuring customers are well-informed and supported post-purchase. Brands such as Toyota, Mercedes, and Honda have performed well in this area.



# Product Quality Versus Value Propositions

## Product Quality Is The #1 Driver Of NPS For Airlines But A Very Different Range Offerings

**Jet2.com**

Jet2 offers a wide range of destinations for leisure and holiday travel, to cater to different customer preferences. They place a strong emphasis on customer service. They also offer competitive and value-for-money pricing for flights and holiday packages, striving to provide affordable options without compromising on the quality. Customer-focused policies for booking/cancellation, baggage allowances, and flexible options for changes or amendments.

virgin atlantic 

Virgin Airlines' aims to deliver a unique and differentiated flying experience with a focus on innovation, customer service, and a touch of luxury. The airline strives to provide excellent customer service from booking to the in-flight experience, with each interaction being friendly, personalised, and enjoyable. They aim to provide a comfortable and enjoyable flying experience with an innovative range of in-flight entertainment options.

 **RYANAIR**

Ryanair's air offers low-cost flights with a focus on efficiency, affordability, and convenience. A no-frills service to offer essential services at a low cost. They charge separately for additional services or amenities which may come as standard for other airlines. They have an extensive route network, connecting numerous destinations across Europe and beyond. They also focus on operational efficiency to keep costs down.

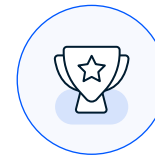


## CASE STUDY

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## One Size Doesn't Fit All

The airline industry is a great example of how a one size fits all approach does not work to differentiate yourself in the market. By targeting different market segments with a different proposition, they can be successful with differentiated experience.



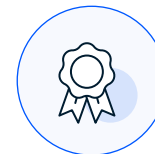
### Focus On Product Quality

Luxury vs No-Frills



### Focus on Value

All inclusive vs Add on charges



### Focus on Experience

Flexible, personalised & friendly  
vs efficiency and cost reduction



### Focus on Innovation

Innovative booking, service &  
entertainment vs Basic



## CASE STUDY / ONE SIZE DOESN'T FIT ALL (CONTINUED)

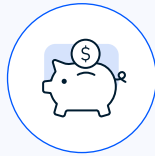
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1



Product quality is the key driver of NPS in the airline industry. Looking at the different airlines reviewed, it is clear to see that it is a sector where different brands target specific types of passengers where product quality and value are balanced in very different ways, and as such the experience offered is very different.

2



Some airlines focus on budget-conscious travelers and offer low-cost options with minimal frills such as Ryanair, while others target premium travelers who are willing to pay more for added comfort, luxury, and services, such as Virgin Atlantic and British Airways.

3



They also operate different business models and cost structures. The more expensive, full-service airlines typically include a lot more within their ticket prices (for example meals, entertainment, and baggage allowances etc) On the other hand, low-cost carriers often adopt a no-frills approach, charging passengers separately for add-ons like baggage, meals, and seat selection.

# Making It Easy For Consumers to Get the Help They Need



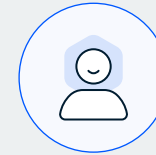
**M**aking it easy for customers to get the help they need is an important driver of NPS in several industries:

<b>DRIVERS</b>	<b>#1 / Energy</b>
	<b>#2 / Water Services</b>
	<b>#3 / Telco</b>

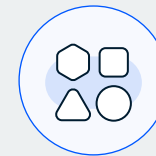
In these industries providing easy access to customer support is crucial. Offering various channels for support for a range of queries, including billing problems, technical support, and service upgrades. These channels can include phone, email, and live chat, can ensure that customers can reach out in their preferred way. Digital touchpoints, like chatbots and online knowledge bases, can provide quick and accessible support, especially for simpler inquiries. Additionally, providing self-service options, such as

an online portal where customers can manage their accounts, pay bills, and report issues, enhances convenience and reduce the need for direct support. Furthermore, allowing customers to monitor and optimise their energy, water or phone and data consumption, can provide consumers with a greater sense of control as this can lead to cost savings.

By investing in employee training and empowering them with the right tools and resources, utility companies can ensure that customers receive personalised assistance and find solutions to their problems efficiently. Having access to knowledgeable customer service representatives is essential for building customer satisfaction and loyalty.



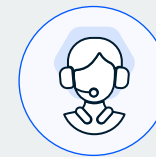
Personalised Experiences



Omnichannel Support



Self-Service, Automation and the use of Chatbots



Proactive Customer Service



Customer Experience Measurement & Analytics

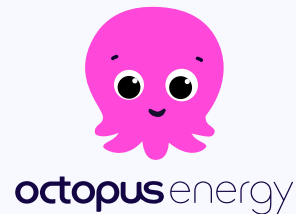


Employee Engagement And Training

**JOHN LEWIS**  
& PARTNERS

John Lewis has received numerous awards for its customer support and service, being consistently recognized for its commitment to delivering exceptional customer experiences.

They also make it easy to get help on their website, with clear and easy to find contact information and many self service options for customer journeys in addition to purchase e.g. tracking orders, returns and refunds.



Octopus Energy leads its industry with a focus on renewable energy, innovative technology, transparent pricing, and exceptional customer service. They have won several customer service awards, reflecting their commitment to providing a positive experience for their customers and making it easy for customers to get help when needed.

They have a dedicated customer support team, multiple communication channels, and proactive communication to customers on energy usage, billing etc. to keep customers informed and engaged. They value customer feedback and actively seek input to identify areas for improvement.



In addition to a strong and recognisable brand, and competitive pricing, Tesco Mobile places a strong emphasis on customer satisfaction and aims to provide excellent customer service. They have a dedicated customer support team and offer multiple channels for customers to get assistance. Tesco Mobile have won multiple awards for their Customer Support (e.g. Trusted Reviews Awards 2022 Best for Customer Service).



**Octopus Energy are really helpful and they offer real time help and support to customers.**



# What Should NPS Laggards Focus On?





## Water Services

**RANKED #14:** INDUSTRY NPS -18

Monopoly: No choice for consumers, and environmental impact of sewage discharge high on respondents' minds. Price increases threatened in the future for investment into infrastructure.

**Dwr Cymru Welsh Water** are clear leaders here, with shareholders, which means put investment back into keeping bills down and looking after their water quality and the environment.

### Water Service Providers Need To:

- Improve perceived value
- Improve ways to help customers through challenging financial times

### To Become More Competitive, Low Performers Need To:

- Improve product quality perception
- Improve social and environmentally responsibility scores

## Electricity & Gas

**RANKED #13:** INDUSTRY NPS -14

High increases in prices in 2022 impacting cost of living.

**Octopus Energy** are a clear leader with its innovative energy solutions as the company encourages consumers and businesses to switch. They are also committed to ensuring that customers are purchasing energy from renewable sources.

### Across the Industry Energy Providers Need To:

- Improve value
- Improve ways to help customers through challenging financial times

### To Become More Competitive, Low Performers Need To:

- Make it easy to get the help customers need



There are always perceived laggards. Our study showed the lowest performing industries to be water services and electricity. There are common themes and specific areas of improvement. These industries are often former monopolies, which may contribute to a perception bias. However, leading brands within these industries have shown that it's possible to excel despite this bias.

One common area for improvement is the **perception of value**. This is particularly important in industries where consumers may not have a choice of providers, such as water services. Reinforcing the value customers receive and providing good service can help enhance customer satisfaction and loyalty.

Additionally, both industries are influenced by the **ESG (Environmental,**

**Social, and Governance) agenda.**

Changes in rules and regulations, especially in the water services industry, have an impact on consumer perceptions around environmental issues. Brands in these industries should address environmental concerns and demonstrate their commitment to sustainability.

In the energy industry, a significant opportunity lies in **helping customers who are struggling with their energy bills**. Given the current energy crisis, providing support to customers facing financial difficulties can make a positive impact. While brands may not have control over macro-level factors, they can assist customers on an individual level and improve their overall experience.

For the water industry, the focus should be on **delivering a quality end product** and addressing the ESG agenda. Providing

clean and reliable water, while also showcasing environmentally responsible practices, can enhance customer satisfaction and trust.

In summary, addressing perception of value, addressing environmental concerns, and providing support to customers facing challenges are key areas for improvement in the water services and energy industries. These efforts can contribute to customer satisfaction, loyalty, and brand differentiation within these sectors.

# Key Takeaways



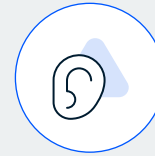
## Key Takeaways

One size doesn't fit all. Throughout this report, we have emphasised the differences between industries and brands. Each brand represents certain values. There are multiple approaches to achieving success. At NPSx and InMoment, we believe that the true differentiators between leading and lagging companies are culture, capability, and execution.

Take action within your company, make necessary changes, and maintain a relentless focus on the customer in whatever capacity you can.

1

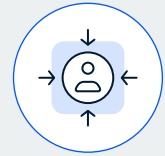
### Listen to Your Customers



While reports like these provide insights, the best way to understand your customers is to listen to them directly. The strength of your organisation's capability to listen, understand, and act upon customer feedback is crucial. The people who use your product or service are the best source for uncovering the truth. Start by gaining a deep understanding of their perception of your brand and how well you deliver an exceptional experience. This will enable you to develop a customer experience (CX) approach that suits your unique circumstances.

2

### Build a Customer-Centric Culture



A customer-focused culture is essential, where processes align with customer-centricity, making it a systematic approach rather than mere aspiration. It is imperative that everyone across the organisation understands their role in delivering for customers and why crucially it makes great business sense. Customer centric companies tend to grow ahead of the market.



3

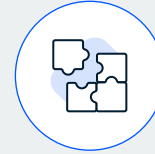
### How You Execute is Key to Your Success



Effective execution determines success. Even if you have established listening posts and a customer-focused culture, poor execution will hinder your progress. It is paramount that customer-focused companies effectively listen, learn, and take action based on customer insights. While knowledge is valuable, taking action based on customer insights is what drives progress. Simply knowing everything without implementing changes will hinder your advancement.

4

### Listen Outside of Your Industry



Often, brands focus solely on their own industry, but looking beyond and seeking inspiration from other categories can give you a competitive edge. Analysing similar structures in different industries can provide valuable insights that may not be apparent when only examining your own category's performance. For instance, in this study, we observed that the automotive industry can learn valuable lessons from other industries, such as energy. Even in relatively narrow categories like insurance, there are opportunities to gain inspiration and insights from unexpected sources. Therefore, considering strategies employed outside your industry can lead to innovative approaches.

5

### Don't Ignore Low NPS Drivers



It was interesting to note that sustainability ranked relatively low in terms of importance. However, upon closer examination, some leading brands do have robust sustainability charters and consider environmental impact in their operations. While it may not be a major driver, there is a subtle undercurrent of customers caring about how companies treat their employees and the origins of their products. Hopefully, we will witness an increase in this trend over time.

# Next Steps



### Why Should You Care About Your NPS?

Companies that prioritise customer experience significantly outperform their competitors in terms of market performance. Even during market downturns, these

industry leaders experience lesser negative impacts compared to laggards. Consequently, failing to invest in customer experience results in substantial costs.

	Energy Suppliers	Grocery Retailers	Insurance	Telecom	Auto	Airlines
<b>NPS Leader</b>	 25	 42	 21	 30	 55	 36
<b>NPS Laggard</b>	-35	-13	-9	-6	8	-17
<b>Market Performance</b>	Absolute change in market share ('18-'22)	Turnover CAGR ('17-'21)	Gross written premium CAGR ('17-'22)	Revenue CAGR ('17-'21)	No. of units sold CAGR ('17-'22)	Passenger traffic CAGR ('17-'22)
<b>NPS Leader</b>						
<b>NPS Laggard</b>						



BRAND

CULTURE

**Create Industry-Defining  
Customer Experiences with  
the CX Flywheel of NPSx**

EXECUTION

CAPABILITY



Leadership in Customer Experience requires companies to differentiate their brand, live and breathe a customer centric culture, develop the right capabilities and excel in CX execution. Only when all these criteria are met, companies will create a positive flywheel with industry leading customer experiences as an outcome.





## CX Advance Framework by NPSx

To become the ultimate champion of customer experience, you must establish a strong foundation based on these nine pillars. By meeting and considering each of these pillars, you can create a powerful flywheel that drives customer experience leadership.

Culture		Capability		Execution				Brand
1 Customer Purpose and Leadership	2 Employee Experience Management	3 Customer Feedback Management	4 Customer Data Management	5 Customer Journey Management	6 Customer Lifecycle Management	7 Customer Service Management	8 Customer Value Management	9 Customer Brand Management
Company purpose and values are centre on enriching customer lives, and are continuously demonstrated and reinforced by leadership and internal processes to create a customer-centric culture ...	There are well defined people systems and processes (e.g., training, onboarding, coaching, huddles, escalation), whereby employees across the organization live the customer purpose and are empowered to create better experiences for customers ...	Customer data, covering all aspects of the customer experience, is collected and assessed regularly by everyone, measured by a common CX headline metric. There are well-defined inner and outer loop systems to support feedback management ...	There is a single view of all customer data (sentiment/loyalty, operational and financial), tied to customer taxonomy and priority use cases supported by a well-defined customer data roadmap ...	The organisation has an end-to-end journey-based approach to managing customer experience with aligned mandates/accountabilities (e.g., single customer taxonomy, accountabilities, well defined linkages to products, journey P&L's, etc.) ...	There are mechanisms in place to support and tailor experience for individual customers depending on their specific needs and where they are on the loyalty spectrum (e.g., recovery for detractors, targeted marketing for promoters, etc.) ...	Customer support is accessible, speedy, effective in terms of resolutions, requires low effort and is supported by capable agents who are empowered to deliver a great experience ...	Customer value indicators are regularly tracked at an individual customer level, aggregated to identify critical battle grounds for customer value and incorporated into strategic decision making ...	The elements of value that a brand stands for / is famous for are well defined, linked to real differentiators in experience, proactively managing perception, and ensuring brand is integrated into experience ...



## Take The Lead! Improve Your NPS



**W**e are committed to providing our clients with an unparalleled growth advantage through industry-defining customer experience. We understand the importance of the Net Promoter Score (NPS) and Net Promoter System and how they can influence business success. To improve your NPS and become a CX leader in your industry, we recommend applying simple CX methodologies. These can help you enhance your customer experience, drive innovation and customer loyalty. By enabling new customer signals, sharing

your findings, building a customer-centric culture and focusing on innovative experiences, you can take your customer experience to the next level.

If you are unsure how to achieve these goals, we would be happy to talk to you about how we can assist you. InMoment's award-winning AI-based experience improvement technology and decades of industry expertise combined with NPSx market-leading training certification and communities for CX practitioners, and CX Roadmap & Assessments help

organisations align and prioritise their CX investments, create customer-centric cultures and give clients a comprehensive set of solutions to support customer loyalty and business growth.

Take the initiative today and book your meeting to start your journey towards improved CX and a remarkable customer experience. We look forward to discussing how we can support your growth and success.

**Book your meeting today!** 

# About the Authors



## Paul Smith

GLOBAL MARKETING DIRECTOR  
NPSX BY BAIN & COMPANY

Paul Smith is a highly experienced marketing professional specialising in brand and customer experience implementation. With a successful background in customer experience and marketing, Paul has a proven track record of building great brands and implementing the Net Promoter System™ to drive customer experience transformations. Before joining NPSx in 2022, Paul was Director of Customer Insight at NatWest Bank, where he was responsible for bringing the voice of real customers into the boardroom and driving customer-led change across all their brands.



## Charlie West

SENIOR INSIGHTS SPECIALIST  
INMOMENT

Charlie has over 10 years experience in CX and is passionate about bringing the voice of the customer into the heart of the business. She calls herself an insights geek, enjoying interrogating data for the stories it can tell. Before joining InMoment she headed up the Global CX Programm at Dyson



## Simon Fraser

VP CUSTOMER EXPERIENCE  
INMOMENT

Simon has designed groundbreaking experience strategies at InMoment for over a decade. Prior to joining the company, Simon consulted on a portfolio of major global brands at Nielsen and GFK/NOP. Simon's decades of experience in helping businesses make better sense of their customers and employees to drive performance improvement, make him a key strategist at InMoment, where he works as a Vice President of Strategy and Insights in EMEA.



## Andrew Wlodarski

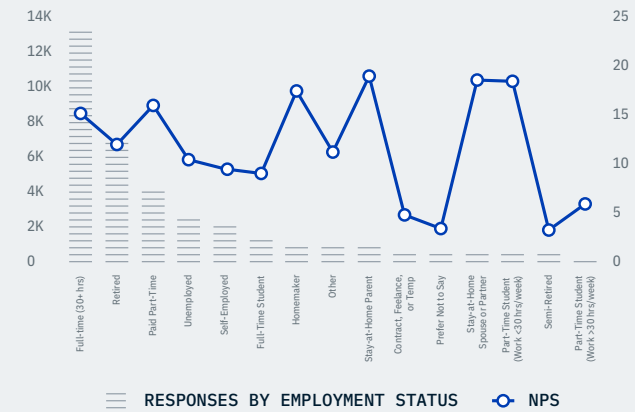
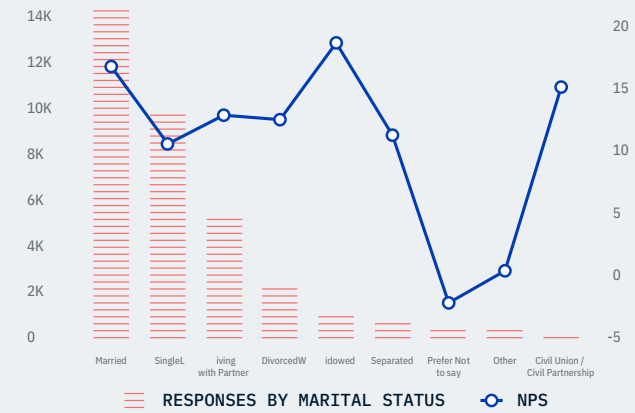
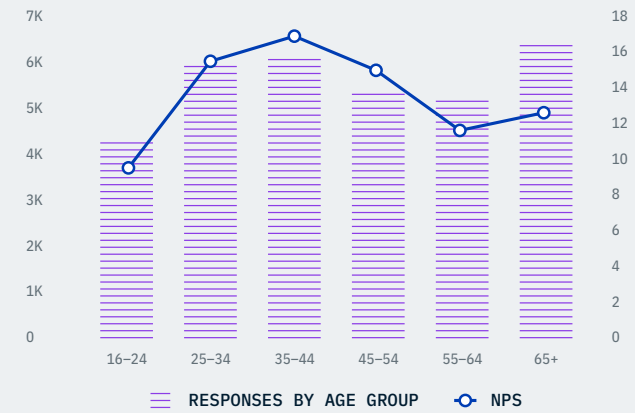
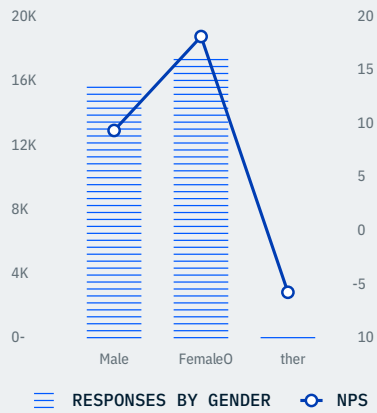
ANALYST TECHNICAL LEAD  
INMOMENT

Andrew has over 15 years of experience in the area quantitative methods in CX. He is deeply passionate about integrating cutting-edge AI and big data methodologies into a business setting, constantly seeking opportunities to leverage the most advanced techniques and technologies available. His expertise covers multiple sectors including financial, automotive, retail and hospitality.

# Who Did We Talk To?



# Respondent Details





+



# Brands Included



Home BB and/or mobile provider with >1M customers	Estimated minimum subscribers >1M	# of UK users at least ~1M	>£1B annual revenue	Ranked repeatedly in the top 10 gig economy apps	>150 stores in the UK	Comprehensive list
Telco	Media	Social Media	Retail	Market Place	Grocery	Financial Services
BT EE O2 PlusNet Sky TalkTalk Three Virgin Vodafone Tesco Mobile	Amazon Music Amazon Prime Video Apple Music Apple TV BBC Channel 4 Disney+ ITV Netflix NowTV Sky Spotify YouTube	Facebook Instagram LinkedIn Reddit Snapchat TikTok Twitter WeChat WhatsApp	Amazon Argos Asos Boohoo Boots New Look Dunelm H&M IKEA John Lewis M&S Matalan Next Primark Shein Sports Direct Superdrug The Range TK Maxx Very (Shop Direct)	Bird Bolt ClassPass Deliveroo Depop ebay Free Now Gett Gumtree Just Eat Lime Uber Uber Eats Money supermarket Compare the market Go.compare Uswitch Etsy	Aldi Asda Budgens Farmfoods Getir Gorillas Heron Foods Iceland Lidl M&S Food Morrisons Ocado Sainsbury's Tesco The Co-op Waitrose	Amex (American Express) Barclaycard / Barclays Capital One Co-op bank First Direct Halifax HSBC Lloyds M&S Bank MBNA Metrobank Monzo Nationwide NatWest Royal Bank of Scotland (RBS) Revolut Santander Starling TSB Virgin Money





Top 9 largest insurance companies by gross written premium	Consistently ranked within the most used airlines in UK/EMEA	Top 10 hotels ranked by # of rooms in UK, and additional key brands + Airbnb	Comprehensive list	>£100m annual revenue	Big 6 + 2 sustainable challengers	Comprehensive list
Insurance	Airlines	Hotels	Auto	QSR/Café	Energy	Water
Admiral Ageas Aviva Axa Direct Line Hastings LV= NFU Mutual RSA Insurance Zurich Churchill esure Bupa Vitality Saga	Aer Lingus British Airways EasyJet Flybe Jet2 Norwegian Ryanair Virgin Atlantic	Airbnb Best Western Britannia Hotels Crowne Plaza DoubleTree Hampton Hilton Holiday Inn Holiday Inn Express Ibis Marriott Marriott Courtyard Novotel Premier Inn Sheraton Travelodge	Audi BMW Citroen Fiat Ford Honda Hyundai Mazda Kia Land Rover Mercedes-Benz Nissan Peugeot Renault Skoda Tesla Toyota Vauxhall Volkswagen Volvo	Burger King Caffè Nero Costa Coffee Dominos Greggs Itsu KFC McDonalds Nando's Pizza Express Pizza Hut Pret A Manger Starbucks Subway	British Gas E.ON EDF nPower Octopus Energy Ovo Energy Scottish Power SSE	Anglian Water Castle Water Dwr Cymru Welsh Water Northumbrian Water Scottish Water Severn Trent Water South West Water Southern Water Thames Water United Utilities Wessex Water Yorkshire Water

## InMoment



Improving experiences is why InMoment exists. Our mission is to help our clients improve experiences at the intersection of value—where customer, employee, and business needs come together. The heart of what we do is connect our clients with what matters most through a unique combination of data, technology, and human expertise. With our hyper-modern technology platform, decades of domain authority, and global teams of experts, we uniquely deliver a focus on Experience Improvement (XI) to help our clients own the moments that matter. Take a moment and learn more at [inmoment.com](https://inmoment.com).



## Take The Lead! Improve Your NPS

Take the initiative today and book your meeting to start your journey towards improved NPS and a remarkable customer experience. We look forward to discussing how we can support your growth and success.

[Book your meeting today!](#)

## NPSx<sup>SM</sup>

**BAIN & COMPANY** 



NPSx<sup>SM</sup> is the new digital customer experience business powered by Bain and Company, world leaders in CX innovation, inventors of NPS<sup>TM</sup> and the Net Promoter System<sup>TM</sup>. NPSx provides the best of Bain IP expertly designed, packaged and digitally delivered via a suite of four cutting edge products: CX Roadmap<sup>SM</sup>, Training & Certification, Community Memberships and Kinetics AI<sup>SM</sup>. Helping companies deliver valuable experiences that enrich their customers' lives, drive loyalty and accelerate growth. [www.npsx.com](https://www.npsx.com)