

A close-up photograph of a family of three—a man, a woman, and a young girl—all smiling and looking at a tablet computer held by the woman. The man is on the left, the woman is on the right, and the girl is in the center. They are all looking towards the tablet with interest and joy. The background is softly blurred, suggesting an indoor setting.

Exceeding
customer
expectations

The EY logo, consisting of the letters 'EY' in a bold, white, sans-serif font. A yellow diagonal line is positioned above the 'Y'.

Building a better
working world

Exceeding customer expectations

Exceeding customer expectations is the next in a series of findings from EY annual research into household attitudes toward technology, media and telecommunications (TMT) products and services within the home. Insights drawn from the online survey of 2,500 UK households, conducted in September 2018, open the door into the nuances of today's digital household. In this report, the findings shed new light on the broadband customer journey as consumer expectations continue to evolve.

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1 Lost in a bundle jungle

Many consumers have trouble engaging with bundles of connectivity and content

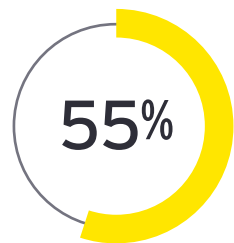
More and more households feel overwhelmed by the range of bundles on offer



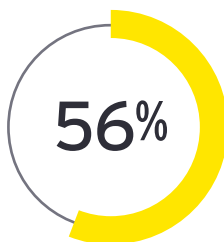
Proportion of consumers that believe there is **too much choice in the market** in terms of different bundles of broadband and content services



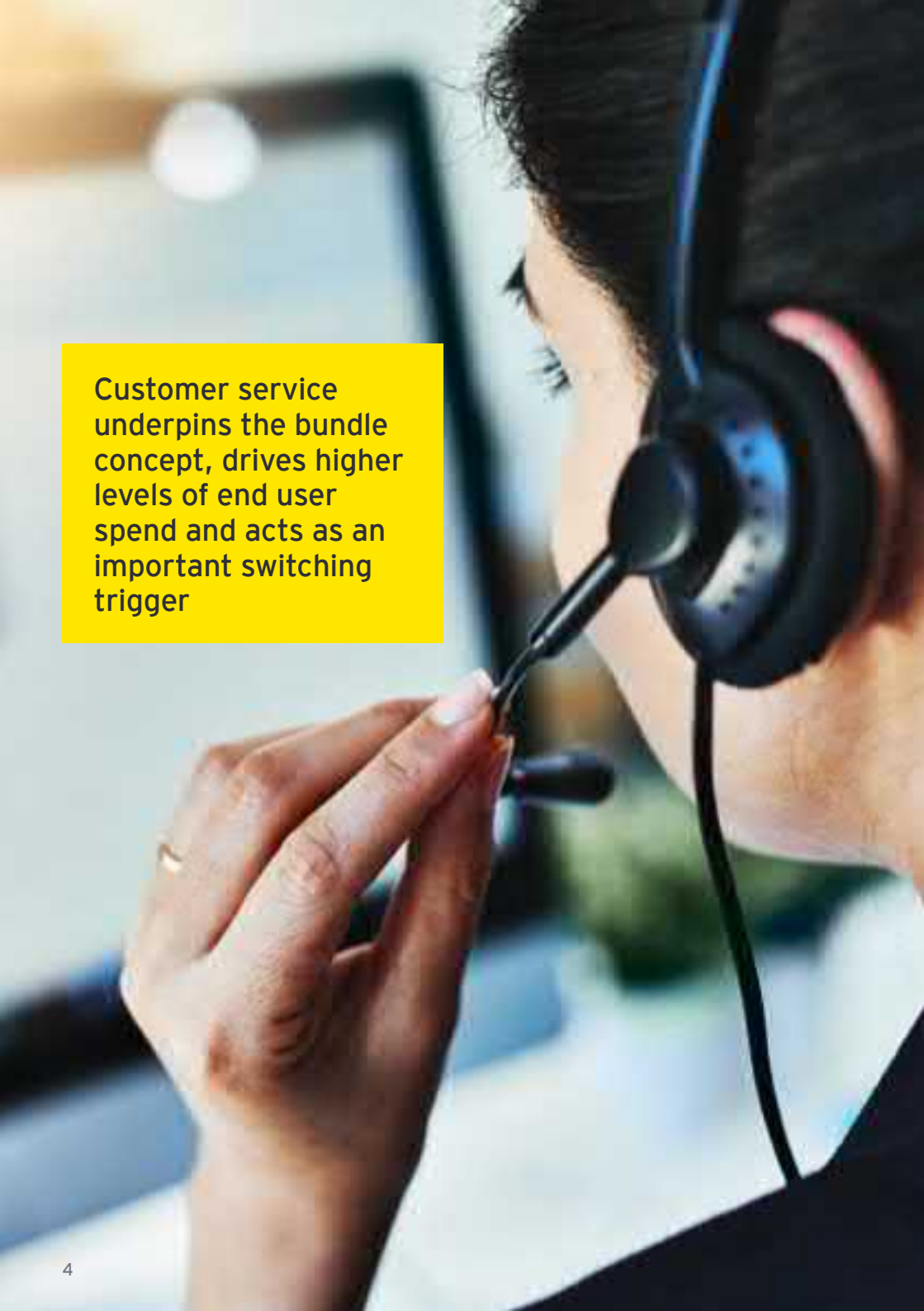
While most consumers respond to introductory offers, even more find them a source of confusion rather than clarity



of consumers agree that introductory offers **played a significant role in their choice** of broadband provider



of consumers believe that introductory offers make it **difficult to work out which broadband package represents the best value**

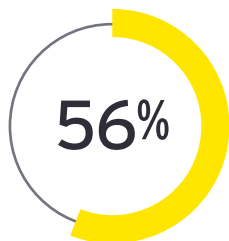


Customer service underpins the bundle concept, drives higher levels of end user spend and acts as an important switching trigger

2 Customer service: a critical element of the value proposition

Customer service credentials are a key differentiator in a crowded and often confusing market

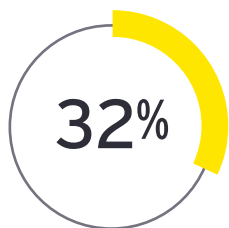
A single point of customer service is a key reason to take up a bundle



of consumers believe that a **single point of customer service is an important reason** for taking a bundle of services from one provider

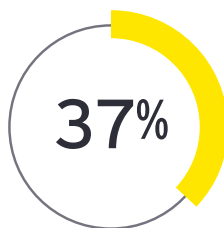


Good customer service can support premium positioning in the market ...



of households are **willing to pay more for their broadband bundle** in return for good customer service

... and also attract those preparing to switch providers



of consumers consider a **reputation for good customer service an important factor** if they were to switch providers

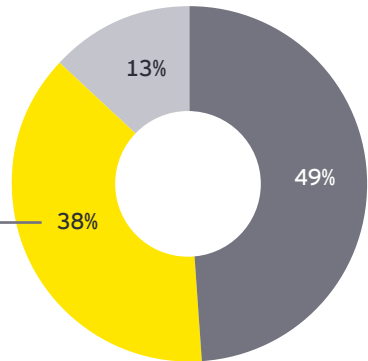
3 Outreach and outcomes: customer dissatisfaction in focus

Broadband customers regularly confront issues that require customer support

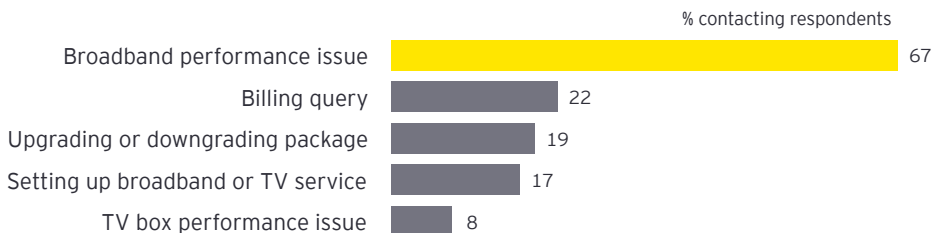
Thirty-eight percent of consumers have contacted their broadband provider in the last 12 months with service performance by far the leading pain point. A number of users also have issues but don't contact customer support – 13% of all users, rising to 23% of 18-24 year olds.

Have you contacted the customer services of your home broadband provider in the past 12 months for a query or to resolve an issue?

- Yes
- No – I have not had any issues
- No – I had an issue but did not contact customer service



What did your issue relate to?

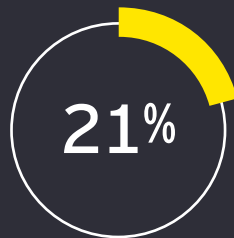




Reasons for outreach vary significantly by age. Billing queries lead the way for the youngest customers, while middle aged users over-index on queries relating to the broadband speed promise



of 18-24 year olds contact customer services with a billing query, compared with 21% of the rest of the market



of 45-54 year olds contact customer services with queries relating to lower broadband speed than expected, compared with 14% of the rest of the market

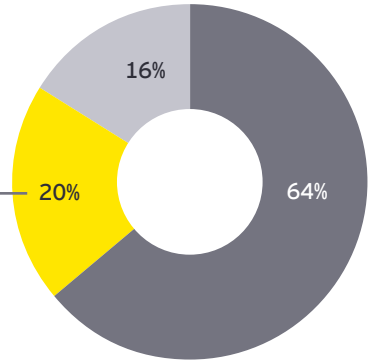
3 Outreach and outcomes: customer dissatisfaction in focus

One in five customers are left dissatisfied with their customer support experience

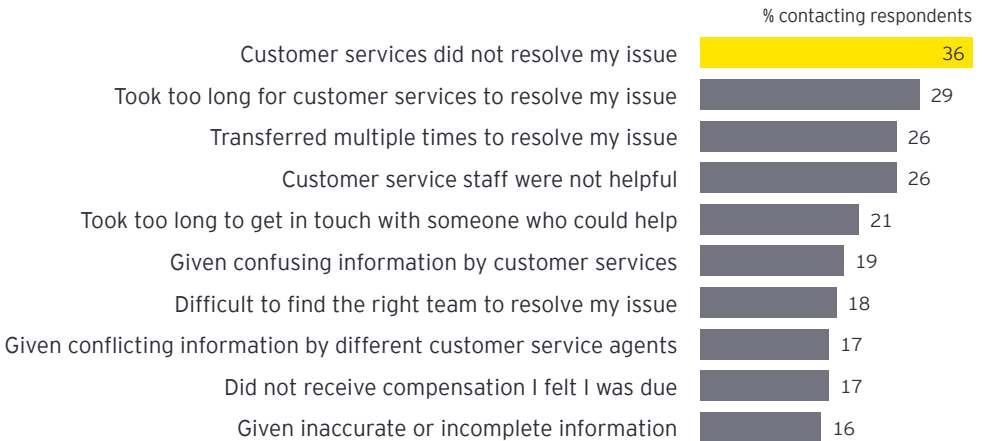
Lack of issue resolution, time spent interacting with customer support and multiple transfers lead as interaction pain points. Confusing and conflicting guidance are also significant drivers of dissatisfaction.

How satisfied were you with the response to your issue by customer services?

- Dissatisfied
- Satisfied
- Neither satisfied or dissatisfied

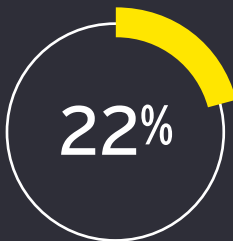


Why were you dissatisfied with the response to your issue?

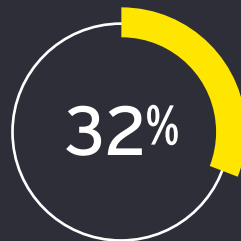




Dissatisfaction drivers vary according to age. Older customers find conflicting information more of a challenge while younger groups are more frustrated by multiple transfers



of 55-65 year olds cite **conflicting information from customer service agents as a reason for dissatisfaction** compared with 15% of other age groups



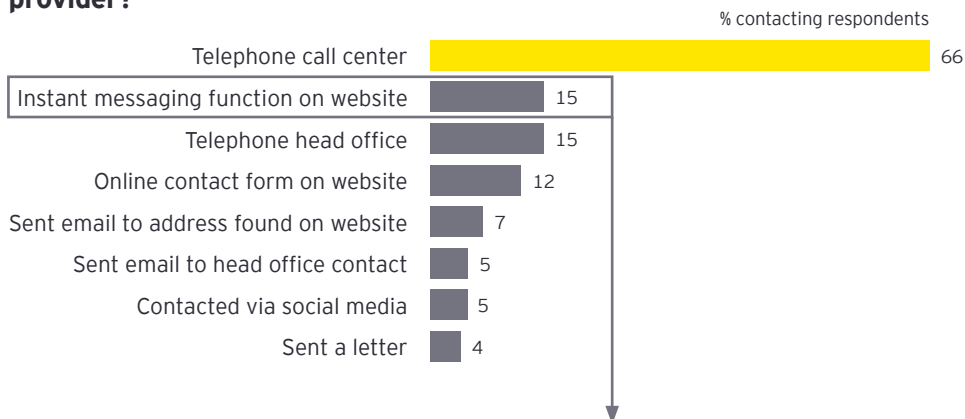
of 18-24 year olds cite **multiple transfers as a reason for dissatisfaction** compared with 26% of other age groups

4 Looking beyond the call center

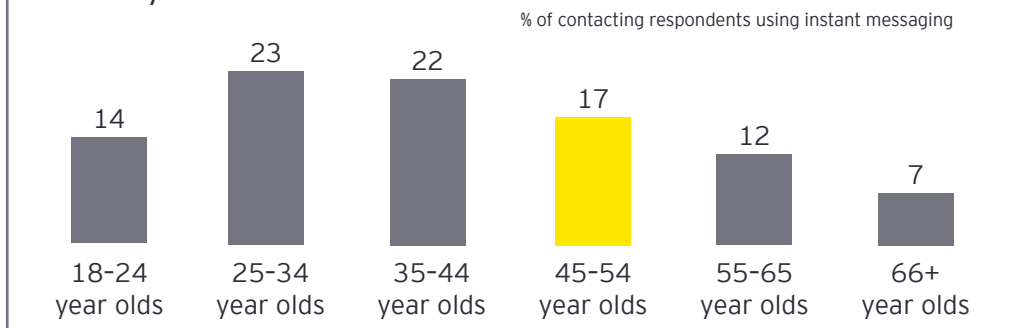
The call center remains the dominant channel for customer support outreach, cited by 66% of households

However, usage of instant messaging ranks second – ahead of emails and online forms – while usage of multiple channels is the norm for all.

How did you contact the customer services of your home broadband provider?

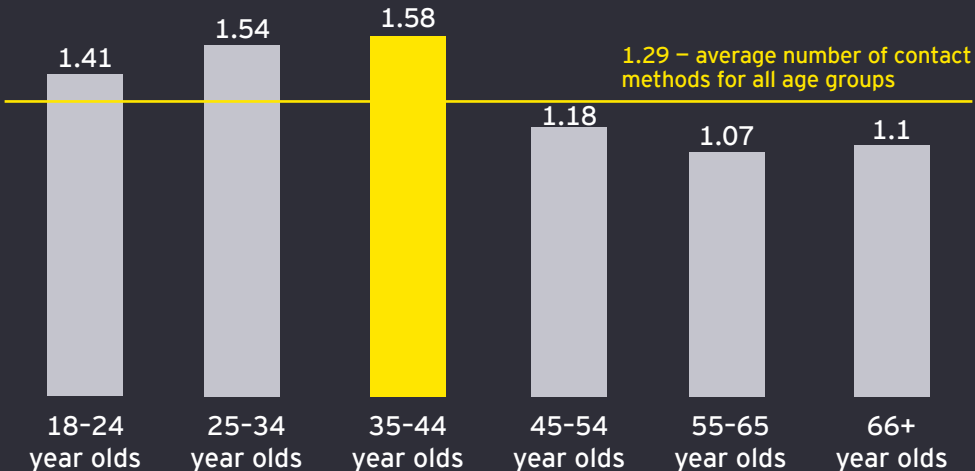


Instant messaging users are older than expected: 45-54 year olds are more likely to use instant messaging than 18-24 year olds





Broadband customers use more than one channel to contact customer services, but multi-channel engagement varies by age



5 What does this mean for broadband and bundle providers?

1

Simplify your product and service portfolio

Broadband users find the landscape of bundle offers overwhelming, while price-led discounts have the ability to confuse as much as attract customers. Going forward, broadband providers should do more to simplify their propositions. Intuitive packaging and pricing can create better customer perceptions – and also help reduce the level of customer service outreach driven by billing and package refinement queries.

2

Adapt your approach to the needs of different age groups

Not all consumers think alike and it's important to revisit assumptions around the needs of different age groups. Younger users over-index on billing queries when reaching out to customer support while older customers are more sensitive to the broadband speed promise. Younger users are also less likely to contact customer support with an issue – and this kind of disengagement does not augur well for long-term loyalty.

3

Deliver on a unified and responsive omni-channel experience

Providing customers with multiple options to receive support should not be an end in itself. Ensuring that all potential touch points, from the contact center to chatbots, act in unison to support a seamless customer journey should be top-of-mind. Multiple transfers, long waiting times and conflicting information are significant drivers of dissatisfaction. In this light, the ability to enable agile and consistent interactions at all times is vital.



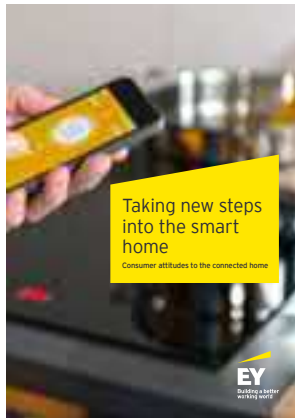
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Visit [ey.com/uk/tmtdigitalhome2019](https://www.ey.com/uk/tmtdigitalhome2019) to open the door into the nuances of today's digital home.



51% of households mainly watch TV programs on the five traditional TV channels, up from 46% in 2017.



32% of households would like to control their home appliances through a new device or app.



43% agree that GDPR will significantly improve the security of their personal data.

For more insight into the digital home and how to serve it, please contact:

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