



National Customer Satisfaction Index Results: UK Declines

Q2 Winners, Losers, and Economic Implications

LONDON (September 2, 2009) – Consumers are slightly less satisfied in the second quarter of 2009, according to [National Customer Satisfaction Index \(NCSI-UK\)](#) results released today. Customer satisfaction dips by 0.1%, now 72.9 on a 100 point scale. The small drop is largely due to declining customer satisfaction in the automobile industry, which - despite economic conditions- still accounts for a considerable portion of overall consumer spending. Even though the NCSI shows a decline in satisfaction, the dip is slight enough to suggest a slowing of the contraction of the economy. In fact, Gross Domestic Product fell only 0.8% in the second quarter of 2009, compared with a 2.4% drop in the first quarter.

Key Findings:

Consumers are considerably less satisfied in the UK than they are in the United States; the [American Customer Satisfaction Index \(ACSI\)](#) score for the same period is 76.1. In the UK, customer satisfaction with **automobiles** declines 1.3% to 76. Customer satisfaction with **full service restaurants** declines by 2% to 79, but the **fast food** industry maintains a score of 73. Among individual companies, decliners outnumber gainers by a small margin: 33% have better customer satisfaction since last year, 42% decline, and 25% are unchanged.

Customer Satisfaction Winners and Losers:

- **Toyota** leads, improves 4% (score of 83) to overtake BMW for #1 in customer satisfaction.
- **BMW** falls 3% to third place (78), beaten by Volkswagen (79) for the first time.
- **Ford** slips 3% behind to tie with **Peugot** (73).
- **Renault** has the lowest customer satisfaction (72) in the automotive industry.
- **Starbucks** leads the limited service restaurants with a score of 75, a 4% gain from last year.
- **Costa** debuts on the Index with a score of 72.
- **Burger King** shows the biggest decline, dropping 4% to 67.
- **McDonald's** shows a slight gain to 66, but remains at the bottom. Consumers now rate the chain as highly as **Starbucks** on value for the price.

For full results and commentary, visit www.ncsiuk.com.

Industry and Company Customer Satisfaction Scores

	NCSI Score		NCSI Score
E-Commerce Industry Average	82	Mobile Operator Industry Average	73
Play.com	87	Tesco Mobile	82
Amazon.co.uk	85	O2	77
All Others	83	Virgin Mobile	77
iTunes	82	Orange	73
eBay.co.uk	79	Vodafone	72
Ticketmaster.co.uk	74	T-Mobile	70
Full Service Restaurant Industry Average*	79	3	67
Home & Motor Insurance Industry Average	77	Credit Card Provider Industry Average	73
All Others Home & Motor Insurance Providers	80	All Other Credit Card Providers	76
Zurich	79	HSBC (includes First Direct)	73
Churchill Group (Churchill/NIG)	78	Lloyds TSB	71
Direct Line	76	RBS Group (The Royal Bank of Scotland/NatWest/Mint)	71
Royal & Sun Alliance	74	HBOS (Halifax/Bank of Scotland/Intelligent Finance)	70
Norwich Union	69	Barclays (Barclaycard/Goldfish)	68
Automotive Industry Average	76	Retail Bank Industry Average	71
Toyota	83	All Other Retail Banks	79
Volkswagen	79	HSBC (includes First Direct)	71
BMW	78	RBS Group (The Royal Bank of Scotland/NatWest/Ulster Bank)	71
All Other Automobiles	76	Lloyds TSB	70
Vauxhall	75	Barclays (includes Woolwich)	68
Ford	73	HBOS (Bank of Scotland/Halifax/ Intelligent Finance)	67
Peugeot	73	Abbey (includes Cahoot)	64
Renault	72	Mortgage Lender Industry Average	70
Department Store Industry Average	76	Nationwide BS	77
John Lewis	80	RBS Group (NatWest/The Royal Bank of Scotland)	72
All Other Department Stores	77	Lloyds TSB (includes Cheltenham and Gloucester)	71
Marks & Spencer	76	All Other Mortgage Lenders	70
Debenhams	74	HBOS (Halifax/Bank of Scotland/ Birmingham Midshires)	68
House of Fraser	73	Northern Rock	68
Petrol Station Industry Average*	75	Abbey	65
Supermarket Industry Average	74	Airline Industry Average	69
Waitrose	82	Virgin Atlantic	75
ASDA	76	British Airways	69
Morrisons	76	All Others	68
All Other Supermarkets	74	BMI Group	67
Sainsbury's	73	Easyjet	66
Tesco	73	Utilities Industry Overall(Electricity/Gas)	63
Somerfield	61	SSE	67
Electrical Retailer Industry Average	74	EDF	66
All Other Electrical Retailers	80	E.ON	63
Argos	73	Scottish Power	63
Comet	73	British Gas	62
Currys/Dixons	69	npower	59
Limited Service Restaurant Industry Average	73		
All Other Limited Service Restaurants	77		
Starbucks Coffee	75		
Greggs/Bakers Oven	74		
Costa	72		
Yum! Brands (Pizza Hut/KFC)	71		
Burger King	67		
McDonald's	66		

* Industry measured in aggregate only

Q1: Airlines, Mobile Operators, Utilities

Q2: Automobiles, Full Service Restaurants, Limited Service Restaurants

Q3: Retail Banks, Credit Cards, Home & Motor Insurers, Mortgage Lenders

Q4: Supermarkets, Departments Stores, Electrical Retailers, Petrol Stations and E-Commerce

About the NCSI-UK

[The National Customer Satisfaction Index - UK](#) is a national economic indicator of customer evaluations of the quality of products and services available to household consumers in the UK. It is updated each quarter with new measures for different sectors of the economy replacing data from the prior year. Second quarter results are based on econometric modelling of survey data from more than 4,000 respondents. The overall NCSI score for a given quarter factors in scores from the leading companies in 16 industries over the previous four quarters. The NCSI – UK is a sister initiative of the [American Customer Satisfaction Index \(ACSI\)](#) and is produced by [CFI Group](#).