



# NIELSEN CX CASE STUDIES

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# CX CASE STUDY: AIRLINES

European Airline partners with Nielsen to understand brand awareness and improve passenger ratings

## CLIENT BUSINESS ISSUE

- The airline company wanted to compare and understand feedback scores from among it's Business Class passenger base
- The company also wanted to understand how their airline compared with other airlines for Business Class experiences
- The objective was to identify key service differentiators based on the needs of the modern Business Class passenger

## NIELSEN'S CX SOLUTION

- Nielsen conducted online surveys of customers of 12 worldwide airline operators, using quantitative and qualitative measurement
- Nielsen combined this research with measurement of total brand awareness to gauge the airline's reputation across a global base
- NPS was employed as the lead metric to determine each passenger's likelihood to recommend the airline
- Reporting would be split across categories such as airport lounge, plane seats, catering, entertainment, cabin crew and amenities

## SUCCESS OUTCOMES

- Using the results, the airline improved its Business Class satisfaction by +3 to 95%
- NPS was 40+, indicating a strong position compared with global NPS leaders
- Improvements included free on-board Wi-Fi, better airport transfers, addition of privacy panels and an improved entertainment system
- Further improvement areas include consistent customer service, better seat privacy and ticket affordability



# CX CASE STUDY: AUTOMOTIVE #1

Nielsen introduces CX technology and better research management for a manufacturer in China

## CLIENT BUSINESS ISSUE

- Big automotive brand in China conducted an after-sales Customer Satisfaction tracker
- CATI surveying with lengthy customer contact lists used
- Recording and updating customer contact records proved very difficult and time-consuming
- Time-frames were very tight; 20,000 interviews to be completed within a 15 day window every month

## NIELSEN'S CX SOLUTION

- Nielsen introduced a real-time data collection and technology platform
- Capabilities included real-time survey imports, results analysis and tracking NPS scores together with ranking at dealership level
- Nielsen made several recommendations to improve the CATI interview and research process including:
  - Interviewer resource management
  - Achievement of daily interview targets
  - Updating of interview list and customer contact information

## SUCCESS OUTCOMES

- NPS from after-sales surveying improved steadily after the introduction of Nielsen's solutions
- The effectiveness of sales and after-sales customer service increased by 38%
- Only 1 complaint was received in the first 3 month of Nielsen's programme



# CX CASE STUDY: AUTOMOTIVE #2

Middle Eastern dealership's KPIs increase through working with Nielsen's bespoke solutions

## CLIENT BUSINESS ISSUE

- This automotive company has a complex estate with many leading car brands sold across a large number of international dealerships
- A wide variety of customer touchpoints meant that an omni-channel approach would be necessary
- The company had no reporting in real-time and little visibility of customer experience at dealership level, having to conduct research themselves

## NIELSEN'S CX SOLUTION

- Nielsen partnered with a leading global EFM technology provider with extensive experience in the Automotive industry:



- The primary measurement was CATI CX Tracker feedback plus Mystery Shopping for extended dealership visits; all reported on real-time dashboards
- As well as using NPS as the lead metric, Nielsen developed a bespoke "Customer Service Value" scorecard, comprising 14pt individual attributes

## SUCCESS OUTCOMES

- Between 2017-2019 the company's NPS increased from 35 to 51 and the "Customer Service Value" score increased by 20% across all attributes
- 360° visibility of results is enabled across the entire business at all levels
- Mystery Shopping supported sales transformation through constant showroom feedback
- In 2019-21 the company will include SMS and Contact Centre surveys whilst adding further operating markets



# CX CASE STUDY: BANKING #1

UK bank asks Nielsen to test its Customer Outcomes framework using Mystery Shopping

## CLIENT BUSINESS ISSUE

- A global bank with HQ in the UK wanted to place less emphasis on product sales and increase its focus on customer satisfaction
- Objectives were to understand if colleagues were making the right product & service recommendations based on customer needs
- Research scope included Customer Outcomes for mortgages, wealth, credit cards and savings enquiries

## NIELSEN'S CX SOLUTION

- Nielsen proposed several stages to achieve the company's measurement objectives:
  - Customer Journey Mapping
  - Mystery Shopping in branches
  - Query resolution & escalation process
  - Insight Activation reports tailored directly for Heads of Business
  - Online platform for results analysis
- Mystery Shopping programme focussed on testing products, scenarios and touch points
- Audio recordings also collected from Mystery Shopping visits for playback

## SUCCESS OUTCOMES

- Journey Mapping enabled the company to recreate and identify authentic customer journeys and service barriers
- Mystery Shopping insight outcomes included ID verification issues which resulted in overall colleague re-training and ID checking process improvements
- Key reporting was enabled for compliance colleagues
- Data is accessible in real-time due to online platform



# CX CASE STUDY: BANKING #2

Canadian bank sees their key CX metrics improve by working with Nielsen on continuous tracking

## CLIENT BUSINESS ISSUE

- The bank needed to identify feedback from the traditionally harder-to-reach Wealth segment of their customer portfolio
- The bank also found it difficult to frequently talk to customers following issues with contact methods and details
- The bank also wanted to explore perceptions towards brand, attitudes towards financial planning and demographic splits

## NIELSEN'S CX SOLUTION

- A 2 year research programme focussing on actionable CX metrics
- Nielsen recommended using NPS (Net Promoter Score) quarterly service tracking through CATI surveys and personal interviewing
- Nielsen also measures customer satisfaction on Financial Advisors following personal appointments
- Reporting would be split out by customer segmented groups, so the bank could understand NPS and satisfaction by different demographics

## SUCCESS OUTCOMES

- The bank has seen key metrics increases over the last 2 years:
  - An overall NPS increase from 27 to 33
  - Further category NPS increases; biggest for Trust Wealth customers from 28 to 48
- Customer feedback has shown an increased focus by relationship managers on service
- The bank now has a much clearer view of feedback by customer segment



# CX CASE STUDY: BANKING #3

Nielsen helps a Central European bank research its customers and better focus on their needs

## CLIENT BUSINESS ISSUE

- The bank wanted to run a research programme to ensure they remained compliant with European Banking Authority requirements
- The solution would require a mixed-data collection methodology across various customer touchpoints

## NIELSEN'S CX SOLUTION

- Nielsen recommended a mixed-methodology CX tracking programme comprised of:
  - SMS surveys via mobile
  - CATI interviews to support above
- Nielsen combined the lead metric of NPS (Net Promoter Score) with a dedicated question to measure the EBA's key focus area of client needs
- Specific customer groups were targeted for surveying to determine categories as well as general results

## SUCCESS OUTCOMES

- Achieving results from SMS surveys enabled the bank to show compliance with and consistency of results based on the EBA's minimum service standards
- Results were further adopted by the bank's national sales teams to underpin monthly incentives-based rewards
- The bank now absorbs mixed-method results to understand the key differences between quick turnaround SMS surveys vs. in-depth CATI interviews

# CX CASE STUDY: FINANCIAL SERVICES

International provider gains key customer insight through Nielsen global crowd sourcing

## CLIENT BUSINESS ISSUE

- An international financial services company recognised the need to source customer feedback in large volumes and quickly
- Full requirement was to gain non-linear feedback on any feedback topic at any time
- Company had utilised traditional research methods many times before but were looking to leverage the power of “Crowd Sourcing”

## NIELSEN'S CX SOLUTION

- Nielsen established a customer panel combining the concepts of both Crowd Sourcing and Gamification, avoiding the limitations of traditional survey methods
- Distribution of feedback base was across 164 countries to enable a true multi-market view
- Approach was to enable feedback on any topic at any time so that feedback was not restricted to fixed topics or a limited range of issues

## SUCCESS OUTCOMES

- Immediate feedback enabled development of the following:
  - Biometric identification
  - Chat Bot services
  - Financial support planning
- Development of the bank's credit card products and services, including:
  - Online log-in & security
  - Clearing overall balances
  - Privilege distinction for top usage customers
- Personas built from a wide range of customer demographics





# CX CASE STUDY: HEALTHCARE

Premium Healthcare company in the UAE commissions Nielsen to track patient satisfaction

## CLIENT BUSINESS ISSUE

- This Healthcare company wanted to track brand awareness and usage and to understand perception vs. marketplace competition
- The brand offers premier standard facilities and services and therefore tracking of patient satisfaction against expectations is essential
- Patient visits to locations were not meeting the highest satisfaction standards, however

## NIELSEN'S CX SOLUTION

- Nielsen's overall CX strategy provided measurement in three key areas:
  - Brand Health – F2F interviews on street
  - In-Patient Satisfaction – CATI surveys
  - Out-Patient Satisfaction – F2F interviews at hospital
- Samples of interviews were tightly controlled in order to maximise insight gained from these patient groups, including local UAE residents, ex-pat populations and international visitors

## SUCCESS OUTCOMES

- Quarterly survey results across two years of measurement yielded critical insight regarding patient insurance cover
- New payer contracts were established with Insurance providers across the region leading to a dramatic decline in concerns regarding cover
- Greater service insight was revealed on outpatient appointments and hospital bed occupancy



# CX CASE STUDY: INSURANCE #1

Nielsen introduces EFM technology to improve New Zealand Insurance company's NPS results

## CLIENT BUSINESS ISSUE

- A large Insurance company in New Zealand wanted to measure omni-channel feedback from customers
- The company was seeking implementation of powerful EFM (Enterprise Feedback Management) software technology
- Emphasis was to be placed on real-time insight and closing the loop on service issues

## NIELSEN'S CX SOLUTION

- Nielsen partnered with a leading global EFM technology provider with experience in the Insurance industry:



- Nielsen recommended specific CX metrics for different business areas:
  - NPS for brand
  - Experience scores for frontline staff
- Collaboration with stakeholders through initial design & delivery stages
- Forums and feedback sessions for colleagues were made available throughout deployment

## SUCCESS OUTCOMES

- Since inception in 2016 the company's brand NPS scores have improved by 17% (+8 NPS) in line with Insurance market leaders
- Frontline colleague Experience scores are also now in the positive extreme
- Main areas of frontline results increases are due to highly improved service delivery
- Co-creation with stakeholders and frontline leaders from day #1 ensured maximum programme engagement



# CX CASE STUDY: INSURANCE #2

New Zealand insurance company partners with Nielsen to increase NPS and customer retention

## CLIENT BUSINESS ISSUE

- This insurance company based in New Zealand was running several customer experience measures, with no single view of customer “truth”
- They wanted to secure a read on satisfaction, service and NPS on a regular basis to gain new customers and retain existing ones
- While focussed on the rural sector with some domestic and commercial customers, they had been losing market share

## NIELSEN'S CX SOLUTION

- Due to the company's diverse customer base Nielsen proposed monthly NPS interviews using CATI calls
- Likelihood to re-join and overall satisfaction were also supporting metrics alongside Net Promoter Score
- Nielsen aligned all separate legacy feedback reporting into one single monitor and removed out of date approaches, including infrequent touchpoint surveying and the use of biased research sample
- The programme results were included in the company's overall performance scorecard and to assist in training new starters

## SUCCESS OUTCOMES

- Working with Nielsen since 2010 the company's NPS has increased from 9 to 56
- In 2012 the programme won Gold in the national Market Research Effectiveness Awards
- Following first year results the company introduced different service models to better serve customers
- Further problems identified by the research have all been improved, including call centre wait times, personalisation of statements, customised pricing and flexible staff resourcing



# CX CASE STUDY: MANUFACTURING

Nielsen measures B2B feedback for Asian Chemicals company using proprietary CX metrics

## CLIENT BUSINESS ISSUE

- This chemicals manufacturer based in Asia wanted better insight on their relationships with product distributors and resellers
- The measures needed to include feedback on product quality, stemming from original factory production standards
- A further requirement was to be able to make like-for-like service and product comparisons with industry competitors

## NIELSEN'S CX SOLUTION

- Nielsen recommended a multi-methodology research approach to capture feedback from a wide range of distributors and resellers:
  - Face to face field interviews
  - CATI interviews
  - Online surveys
- Nielsen also recommended measurement through two key proprietary metrics:
  - Nielsen eQ – Trade Satisfaction
  - Nielsen RSI – Relationship Strength Index
- Benchmarking data was also made available using Nielsen's Global CX Norms to enable cross-industry comparisons

## SUCCESS OUTCOMES

- Nielsen's touchpoint interviewing gave real "customer stories" back to the company, so that specific service problems could be identified and addressed
- The immediate impact was so successful that the programme scope was increased from 1 group business unit in 2017 to all 10 business units by 2018
- The programme insight has become a vital component in company operations, likely to be renewed for a further 3 years in 2019



# CX CASE STUDY: RETAIL #1

Large European retailer increases their NPS through Nielsen exit interviews and real time dashboards

## CLIENT BUSINESS ISSUE

- This company was measuring customer feedback in their stores but only had a basic paper-based research programme, given by cashiers to customers at till points
- The limitations of this approach meant no overall data, limited reporting capabilities and no visibility of store-level performance
- The company had no key CX metric in place, so couldn't compare or benchmark their results

## NIELSEN'S CX SOLUTION

- Nielsen proposed a national bi-annual Customer feedback tracking study across approximately 270 stores
- The lead metric is NPS, enabling the company to compare and benchmark their performance with other retailers
- Data collection method moved from paper surveys to real-time upload from exit interviews conducted immediately after a shopping experience, capturing "in the moment" feedback
- The company has access to an online reporting platform where results can be viewed and analysed

## SUCCESS OUTCOMES

- Significant NPS increases have been achieved – from 60 (Q1 2014) to 79 (Q4 2018)
- Access to real time insight and changes to product and service have been a key success factor
- Granular dashboard reporting allows NPS results by store, by area and company overall
- The programme's success has led to further extended research conducted in franchise and cash & carry stores



# CX CASE STUDY: RETAIL #2

Supermarket chain in Middle East improves service and products through Nielsen Mystery Shopping

## CLIENT BUSINESS ISSUE

- The company saw a decline in market share whilst competitor shopping experiences were improving
- Some feedback had been received that retail store conditions and customer service were both poor
- Large scale of company's retail estate (381 stores) meant consistent issues were hard to identify and corrective actions were hard to take

## NIELSEN'S CX SOLUTION

- Nielsen proposed parallel CX research solutions:
  - Mystery Shopping
  - Online Customer Satisfaction
- The Mystery Shopping methodology focussed on 4 key parameters:
  1. Convenience
  2. Hygiene & Cleanliness
  3. Product Quality
  4. Customer Service
- The above 4 factors were made part of an Assessment "Diamond" where no one KPI took precedence over another, thus enabling the company to focus on overall improvement and understand key satisfaction drivers

## SUCCESS OUTCOMES

- 2 year's worth of programme results to date are essential for HR evaluations of store and colleague performance
- Nielsen's Mystery Shopping contributed to improvements in store signage, freshness of stock, removal of pest infestations and more effective staff resourcing
- Results are now a vital part of quarterly company business performance reviews
- Nielsen expects a complete programme renewal in 2019



# CX CASE STUDY: RETAIL #3

Nielsen helps large European supermarket chain uncover key drivers towards customer satisfaction

## CLIENT BUSINESS ISSUE

- This supermarket chain wanted to understand customer feedback across their stores in Hungary and from their main competitors
- The company identified the top 5 strengths and weaknesses they wanted to track to improve store service and win greater market share
- Existing measurement did not enable a deep understanding of customer preferences during their shopping experiences

## NIELSEN'S CX SOLUTION

- A 3 year programme to track customer satisfaction trends using the following methodologies:
  - Exit interviews immediately after shopping experiences across 3 different store types (hypermarket, supermarket & franchise)
  - At-home interviews with customers following competitor store visits
  - Accompanied Shopping Trips in both stores and competitor stores
- Nielsen recommended NPS as the lead metric to capture customer's likelihood to recommend compared with their competitors

## SUCCESS OUTCOMES

- In-depth outcomes from personal interview experiences led to specific action plans and service changes made by the company
- Specific insight revealed that quality and availability of the supermarket's own fresh and processed meat brands had a high impact on satisfaction
- As a result Nielsen is now conducting specific deep-dive research into individual product lines as a separate tracking programme



# CX CASE STUDY: RETAIL #4

Nielsen provides enhanced Mystery Shopping for Swedish retailer with stores in the Middle East

## CLIENT BUSINESS ISSUE

- This retailer had been running Mystery Shopping for some time but missing measurement of key touchpoints during the in-store customer journey
- There were major concerns in stores regarding check-out queues being overly long and poorly managed
- The retailer also suspected that the self-service model which works in other markets was failing in the UAE based on fierce customer-centric competition

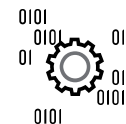
## NIELSEN'S CX SOLUTION

- Nielsen provided a full 360° Mystery Shopping programme and reporting schedule with a key Mystery Shopping satisfaction metric tracked over time
- 4 key areas of measurement underpinned the programme's scoring system:
  - Customer Centricity
  - Product Basics
  - Appearance of Store & Co-workers
  - Easy Buying
- Programme design was collaborative, based on practical considerations and logical customer journeys, focussing on specific product enquiries

## SUCCESS OUTCOMES

- Over 2 years an uplift in Mystery Shopping score of +5% points was achieved
- Main impact on results was the overhaul of training and staff initiatives following each successive wave of visits
- Solutions to long queues included improved online ordering and new in-store Order & Collection Points
- Customer engagement also improved through "Suggestive Selling" re-training following results





# CX CASE STUDY: TECHNOLOGY

Technology company recruits Nielsen to increase it's customer satisfaction across Asian markets

## CLIENT BUSINESS ISSUE

- Need for Customer Satisfaction tracking results to feed into overall management scorecard
- Feedback from customers was that service had been ordinary and indifferent
- Company was already measuring a mixture of key metrics and KPIs causing business confusion
- Business is multi-market with a requirement for cross-region reporting at various levels

## NIELSEN'S CX SOLUTION

- Nielsen began a three-year transformation programme including C-Sat tracking and Service Quality impact vs. previous year
- Stakeholder engagement sessions and request for high level sponsorship from Managing Director
- Balanced scorecard with C-Sat included as a key metric to better impact remuneration for company employees

## SUCCESS OUTCOMES

- Since 2016 scores have increased to 90%+ in both Hong Kong and China
- Singapore and Malaysia have also seen their overall C-Sat scores improve to 80%+
- 62% of customers now feel the overall service they receive has improved
- Managing Director is now a key programme sponsor and joins all market level MDs at bi-annual results presentations



# CX CASE STUDY: TELCO #1

SIM-only Mobile operator partners with Nielsen to measure relationship strength and NPS

## CLIENT BUSINESS ISSUE

- This mobile operator wanted to gain feedback from a broadly distributed and varied usage customer base
- The operator only offers SIMs and Pay-As-You go mobile plans, therefore focusses on good mobile signal and great customer service rather than innovative handset features
- A robust CX metric was required in order to establish a basis for comparison with other mobile operators

## NIELSEN'S CX SOLUTION

- Nielsen implemented an online research programme with interviews across 6 European markets
- NPS was the recommended key metric alongside Nielsen's proprietary RSI (Relationship Strength Index) model
- Nielsen RSI focusses on 6 key attributes behind relationship strength: Trust, Price, Comparison, Value, Satisfaction and Fulfilment
- Nielsen interviewed a broad distribution of customers in order to gain widespread and varied feedback

## SUCCESS OUTCOMES

- Through Nielsen's RSI model, the operator has seen a 10% increase in these scores from inception to latest results, meaning a stronger relationship with customers
- Results also indicate a reduction in customer churn through acting on customer feedback
- The operator is achieving a higher complaints resolution rate, through awareness of trending issues



# CX CASE STUDY: TELCO #2

Leading mobile network in Saudi Arabia asks Nielsen to track C-Sat across national customer base

## CLIENT BUSINESS ISSUE

- This mobile operator wanted key insight on customer satisfaction compared to national competitors
- The operator had a number of customer key attributes they wanted to track over time
- Lower market share compared with other mobile networks meant the operator wanted to understand differences in coverage, service standards and pricing

## NIelsen'S CX SOLUTION

- Nielsen recommended online surveying, tracking Customer Satisfaction
- Nielsen utilised a blend of NPS and proprietary Nielsen CX metrics in order to track Satisfaction across different groups and customer types
- Attributes measured and captured included emotional and functional engagement factors
- Diversity across regions and nationality groups also meant key customer segmentation was essential

## SUCCESS OUTCOMES

- As this was a group commissioned tracking programme, the mobile operator was able to cross-nationally compare results
- Results from various customer demographics led to focused improvements centred on sub-populations from various international backgrounds
- Saudi national customers also registered satisfaction increases following focused Loop Closure based on service dissatisfaction



# CX CASE STUDY: TELCO #3

Middle Eastern mobile operator enhances KPIs through Nielsen Mystery Shopping

## CLIENT BUSINESS ISSUE

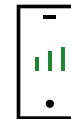
- This mobile network operator was experiencing stiff competition in local stores through ongoing customer service comparisons
- The operator wanted to continue investing in stores as a “front end” for customer engagement and brand experience
- Several locations had already been identified as sub-standard based on customer experience factors

## NIELSEN'S CX SOLUTION

- Nielsen executed an extensive national Mystery Shopping programme in order to capture and track all customer-facing operational and brand KPIs
- All stores received 4 x visits per year ensuring even distribution
- Key KPIs covered included Exterior Condition, Scenario/Product Testing and Colleague Product Awareness
- Nielsen produced a key metric Mystery Shopping score using combined results from different key KPIs, tracked across the entire estate

## SUCCESS OUTCOMES

- Low KPI scores were the immediate focus area for all stores; this resulted in store-level focused improvements
- Results enabled creation of ranked store reporting, with a special category generating for poor-performing stores based on customer experience alone
- Benchmarking vs national competitors was also implemented in order to track against immediate competition



# CX CASE STUDY: TELCO #4

Leading mobile operator in Thailand works with Nielsen to transform B2C & B2B customer experience

## CLIENT BUSINESS ISSUE

- As a leading mobile operator, this client wanted to better understand and track satisfaction among its core customer base
- The operator already ran a number of tracking studies and research projects without commonality across results
- Client has no clear picture of what was impacting service levels and ultimately ensuring repeat business

## NIELSEN'S CX SOLUTION

- Nielsen implemented tracking with lead metrics of NPS and C-Sat as parts of a balanced scorecard
- Nielsen also utilised its proprietary satisfaction measure eQ, in order to further enhance insight and results from this tracking programme
- Set up was initially for B2B customers, where the operator had little visibility of insight and key account understanding
- Nielsen importantly standardised measurement across all locations to provide a consistent perspective on feedback through key CX metrics

## SUCCESS OUTCOMES

- Results achieved immediate management attention; many years later is now used as a Corporate-wide measure
- Nielsen has expanded measurement from B2B to Contact Centre and now in B2C
- Key impact factors are immediately highlighted; e.g. recent score drops based on up-country regional performance
- Other transformation based on programme results includes improved Claim process handling and Salesperson performance



# CX CASE STUDY: TRANSPORT

Middle Eastern company partners with Nielsen to measure CX ahead of global event

## CLIENT BUSINESS ISSUE

- A transport company with a brand new infrastructure recognised the need to prioritise customer delight as a key part of it's development strategy
- With no existing network the company had colleagues experienced in CX but no basis for comparison
- The company wanted to combine the best current practices in market research, customer feedback and technology

## NIELSEN'S CX SOLUTION

- Nielsen partnered with a leading CX platform provider and a social media analytics company to provide a 360° customer feedback solution:



- Programme implementation phased over 5 years to ensure the company could develop CX maturity alongside new infrastructure
- Ability to adapt and flex requirements based on real-time business changes built into programme from day #1

## SUCCESS OUTCOMES

- Early fieldwork and demographic analysis have led to re-modelling of some elements of physical journeys
- New infrastructure phases are leading to increased real time feedback and insight
- Social analysis phase yielding brand feedback ahead of opening of new locations
- Combination of field research and real-time survey feedback enables total visibility



# CX CASE STUDY: UTILITIES

Nielsen helps a global energy provider capture better NPS feedback and improve their results

## CLIENT BUSINESS ISSUE

- An energy utilities company based in Europe wanted key driver analysis of NPS surveys
- Required different insight from both residential and business customer base
- Limited visibility of actions to improve results and achieve greater market share
- Competitor results often better and improving

## NIELSEN'S CX SOLUTION

- Nielsen introduced a new CX tracking study measuring NPS through CATI phone interviews
- Monthly frequency for surveying with annual Key Driver Analysis on NPS factors
- Advanced statistical models to ensure data accuracy (Shapley Value & Bayesian Networks)
- Priority Action Plan around three key business areas:
  - Brand Perception
  - Value Proposition
  - Touchpoint Feedback

## SUCCESS OUTCOMES

- Company NPS score has improved YOY since 2011 :
  - 40+ for residential
  - 30+ for business
- Company NPS is now only 5pts away from residential market leader and joint top for business
- Results are now monitored to mitigate sector threats and avert dissatisfaction
- Nielsen has been selected as research partner through competitive tender in 2011, 2014 and 2018



nielsen

THE SCIENCE BEHIND WHAT'S NEXT™

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