Top UK Mobile Phone Networks
Customer Experience Report
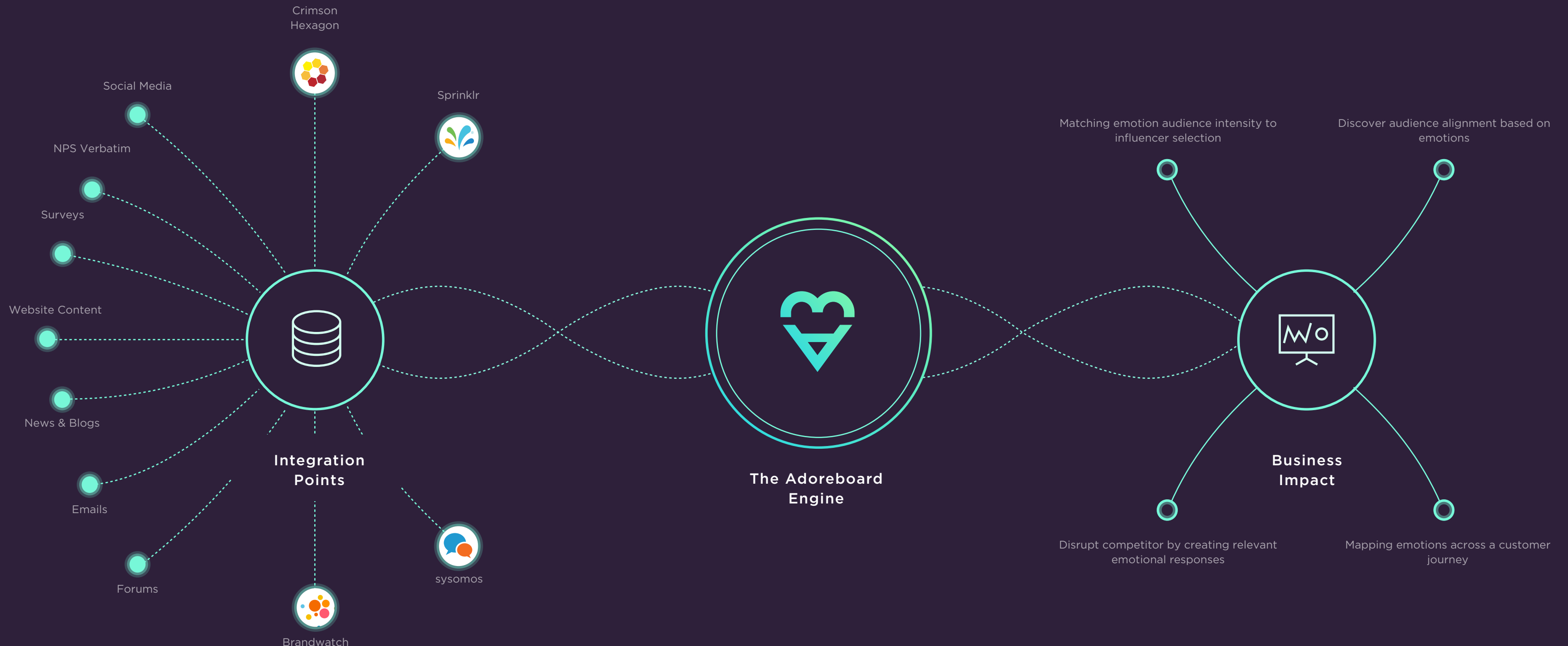
Emotional Analysis Meets Human Intelligence

We specialise in Emotion Analytics, a pathway to improve customer experience and loyalty.

Named as a 'Best Tech Company' from UK and Irish Universities by Dr Craig Barrett (former CEO/Chairman of Intel) at the Silicon Valley Global Leadership Forum, Adoreboard is an emotion analytics spinout company from Queen's University, one of the UK's leading universities & part of the Russell Group.

Adoreboard provides emotion analysis solutions to help brands measure and optimise how people feel about them online. Emotics, Adoreboard's emotion analytics platform, uses emotion analysis to identify the feelings expressed and the emotional themes driving those feelings.

Crimson Hexagon

Sprinklr

Social Media

NPS Verbatim

Surveys

Website Content

News & Blogs

Emails

Forums

sysomos

Brandwatch

Integration Points

The Adoreboard Engine

Business Impact

Matching emotion audience intensity to influencer selection

Discover audience alignment based on emotions

Disrupt competitor by creating relevant emotional responses

Mapping emotions across a customer journey

METHODOLOGY

Adoreboard took a sample of **83,546** tweets directed at **9** of the UK's leading mobile network providers for the first 8 months of 2017.

The tweets were analysed for tone and emotional content using Emotics. The tone of the communication is represented by the Adorescore. The mentions of each network were also scored against 24 emotions, which contributed to ther ranking on the 8 Emotion Indices.

These metrics formed the basis of a comparison between the companies, revealing which are providing the best customer experience and which are leaving customers unsatisfied.

These metrics provided insights into key performers for customer experience and areas which require improvement.

THE TONE OF THE COMMUNICATION IS REPRESENTED BY THE ADORESCORE.

The Adorescore is a measure of brand reputation. It is a high level performance indicator of how a brand is doing on an index of -100 to 100.

A high score means the content is largely positive in nature, containing positive emotions such as joy, trust and amazement. A negative score would indicate mostly negative emotions being expressed within the content such as rage, loathing and fear.

64 -12

MARKS & SPENCER

48 +3

NIKE

-88 +2

DONALD TRUMP
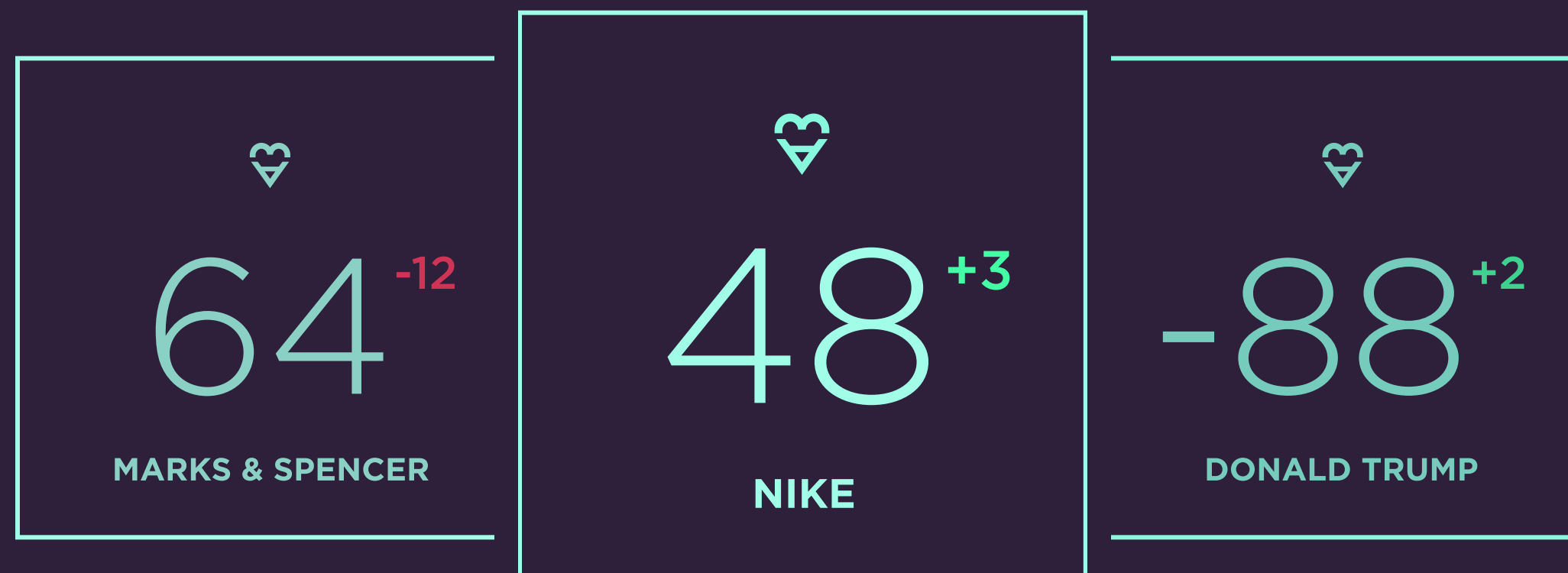
The emotion indices are a simple framework for communicating the position of a brand in relation to an industry average or competitor.

We currently provide 8 indices - **Joy, Trust, Interest, Surprise, Sadness, Disgust, Anger** and **Fear** - with each being scored out of 100. The score represents the extent to which the emotions associated with the index are prevalent in the analysed content. The higher the number, the higher the level of emotion.

Emotics allows the user to delve deeper into the content through the scores on each of the 8 indices. Each index is further broken down to show the emerging emotional themes from the analysed content which drive each emotion and snippets of text that contribute to these emotional themes.

RESULTS

1

BRAND REPUTATION: THE LEADERBOARD

The table below uncovers which UK Mobile Network provides the best customer experience.

COMPANY	ADORESCORE
TESCO MOBILE	44
O2	39
EE	38
GIFF GAFF	38
VIRGIN MEDIA	34
THREE	29
SKY	22
BT	11
VODAFONE	-16

During the first 8 months of 2017, **Tesco Mobile** ranked in first place for customer experience with an overall Adorescore of **44**, closely followed by O2 and EE. Whilst at the bottom of our analysis is **Vodafone** with their Adorescore of **-16**.

The industry average Adorescore is **27**. Using this gives a clear indication of how companies are performing relative to their competitors.

2

EMOTION INDEX: TOP TRUST

In our 2017 analysis, **Tesco Mobile** had the highest level of trust at **40**, which is **+5** points higher than the industry benchmark. Tesco's high level of trust was driven by mentions of "great customer service". Tesco's staff have been thanked for their helpful and useful advice which has increased trust in the brand.

Virgin Media came closely behind with a trust ranking of **38** driven by mentions from loyal customers who feel valued by the company.

Trust is a major driver for overall customer satisfaction.

COMPANY	TRUST INDEX
TESCO MOBILE	40
VIRGIN MEDIA	38
GIFF GAFF	37
EE	37
O2	37

" @TESCOMOBILECARE ONE OF YOUR ADVISORS WENT ABOVE AND BEYOND TO GET ME A GOOD DEAL. THEY'RE THE DEFINITION OF WHAT CUSTOMER SERVICE IS ABOUT

" @VMCCARE @VIRGINMOBILECAN CAME THROUGH! TY! YOU DELIGHTED A LONG TIME, LOYAL CUSTOMER! #GOODBRANDINGACTION

3

EMOTION INDEX: TOP JOY

Over the past 8 months of 2017, **Tesco Mobile** also ranked in first place for joy with a score of **34**. This was driven by Tesco's "home from home" deal which allowed customers to use their data for free across Europe, before the EU roaming charges were abolished in June 2017.

EE came in second place for joy with a score of **32**, this was driven by mentions of "good deals" that are regularly offered by the company.

" @TESCOMOBILECARE WILL YOU BE DOING YOUR HOME FROM HOME PROMOTION AGAIN THIS SUMMER? OUR FAMILY LOVED IT LAST YEAR!

" @GETTING SOME GOOD DEALS FROM @EE TODAY :) LIKES #SAVING ME SOME #MONEY.

COMPANY	JOY INDEX
TESCO MOBILE	34
EE	32
GIFF GAFF	31
VIRGIN MEDIA	31
O2	31

4

EMOTION INDEX: ANGER

Our analysis revealed that **Vodafone** had the highest mentions of anger with a score of **21** meaning there is room to make improvements to their customer experience. High levels of anger were driven by mentions of "rude staff".

BT also scored highly on the anger index with an Adorescore of **20**. This was driven by BT engineers not showing up to repair faults with the service.

COMPANY	ANGER INDEX
VODAFONE	21
BT	20
SKY	18
VIRGIN MEDIA	17
GIFF GAFF	15

"

@VODAFONEUKHELP YOUR CUSTOMER CARE TEAM ARE ABSOLUTELY SHOCKING. SO RUDE AND NOT HELPFUL IN THE SLIGHTEST.

"

@BTCARE BOOKED FOR 8-1PM. NO ONE SHOWED. MY PARTNER IS A NURSE & JUST FINISHED HIS 3RD NIGHT SHIFT. STAYED UP FOR NOTHING. NOT GOOD ENOUGH @BT_CARES

5

EMOTION INDEX: SADNESS

Vodafone also scored highest in the sadness index, with customers spending lengthy periods of time on call with Vodafone driving levels to **30** which is +6 points more sadness than the industry average.

BT also have high levels of sadness with an Adorescore of **29**. This was driven by loyal customers who do not get the same deals as new customers.

COMPANY	SADNESS INDEX
VODAFONE	30
BT	29
SKY	27
VIRGIN MEDIA	25
THREE	23

"

@VODAFONEUKHELP ALREADY BEEN ON HOLD FOR JUST OVER 2 HOURS, WASTE OF TIME?!

"

@BTCARE ALREADY HAVE, DEALS WORSE THAN ELSEWHERE. CAN'T CANCEL WITHOUT CHARGE. NEW CUSTOMER DEALS ARE GOOD BUT DON'T CARE ABOUT EXISTING CUSTOMERS

The research revealed **3** important lessons for UK Mobile Networks to optimise and improve their customer experience.

1

Customer rewards - Mobile phone service providers must reward loyal customers with special deals or offers. An important means of creating customer lifetime value is by rewarding loyal customers, special offers should not only be relevant for attracting new customers. Customers who feel valued are more emotionally engaged with the brand and are more likely to spend more money.

2

Efficiency in dealing with customer issues - Customer experience is vital to maintaining customer loyalty, therefore mobile service providers need to have staff and resources in place to deal with customer complaints. Long waits on hold to customer service teams and rude staff drive customer anger, which in turn results in customer dissatisfaction and puts the company at risk of losing that customer.

3

Service offerings that align with customer expectations - Inadequacies in service offerings (such as poor signal) lead to customer's distrust in the company and drive dissatisfaction. Mobile phone service providers need to ensure that their services meet the needs of their customers. Emotion analytics can be used to understand what is driving customer emotion so improvements can be made to overall customer experience to maximise brand reputation.

CONCLUSION

The research highlights the main themes that boost and hinder customer experience.

Understanding the main drivers of customer emotion is crucial for all mobile phone service providers as they try to improve their customer experience. Customer loyalty is key and emotion analysis unlocks the reasons why customers may switch networks.

Competition across UK mobile service providers is increasing as it is becoming more difficult for networks to differentiate themselves.

Themes that boost customer experience:

- Rewards and special offers for loyal customers tailored to their specific needs

- Rapid response times to customer queries, with polite and helpful customer service teams

- High quality services and offerings

Themes that hinder customer experience:

- Rude customer service staff with long delays on the phone

- Poor and inadequate service offerings, particularly unreliable network services

- Lack of reward schemes for loyal customers

CONTACT US

Adoreboard can provide in-depth emotion analysis that creates clear actionable insights to improve business desicion making. We offer access to Emotics, a user-friendly emotion analysis tool, as well as personalised consultancy services with our in-house team of data scientists, who can provide you with insights to help inform business decisions.

If you would like more information, please contact us below.

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