

Customer Review Study: Understanding Key Drivers of Sentiment



Contents

1	Executive summary	4
2	Introduction	7
3	Sector analysis	8
i	Automotive	10
ii	Business services	12
iii	Financial services	14
iv	FMCG	16
v	Home & garden	18
vi	Property	20
vii	Retail	22
viii	Travel	24
4	Key takeaways and recommendations	26
5	Methodology	27

Executive summary

Feefo, the world's largest provider of verified reviews, has uncovered how the last two and a half years have transformed the way consumers and brands communicate.

The research draws on over five million customer reviews from across eight key sectors. At the height of the coronavirus pandemic, Feefo found the average customer service rating had plummeted by 18.9%. Feefo's new analysis reveals how companies need to evolve to stay successful.

The past few years were dominated by two of the most momentous phenomena in recent history – Brexit and coronavirus. Each sector fared differently. In automotive, average sentiment increased from 58% in spring 2019 to 73% in autumn 2021. Over the same period, property benefited from a rise of three percentage points to 70%. But average sentiment around home & garden slumped from 66% to 58%, while retail tumbled from 68% to 53%.

Feefo's reviews show how businesses reacted to the consequences beyond the headlines – with every market struggling with its own unique challenges.

Issue resolution

For example, in FMCG, the way a company responded to delivery issues was five times as important as the quality of the products sold, and nine times as important as the range of products offered.

For all sectors involving deliveries (retail, home & garden, and business services), delivery issue resolution came first. This was especially true in home & garden during the third lockdown when delivery delays, due to Brexit causing a lack of available delivery drivers, coincided with the planting season.

Sentiment winners and losers since 2019

Automotive



+15

2019

2021

Property



+3

2019

2021

Home & garden



-8

2019

2021

Retail



-15

2019

2021

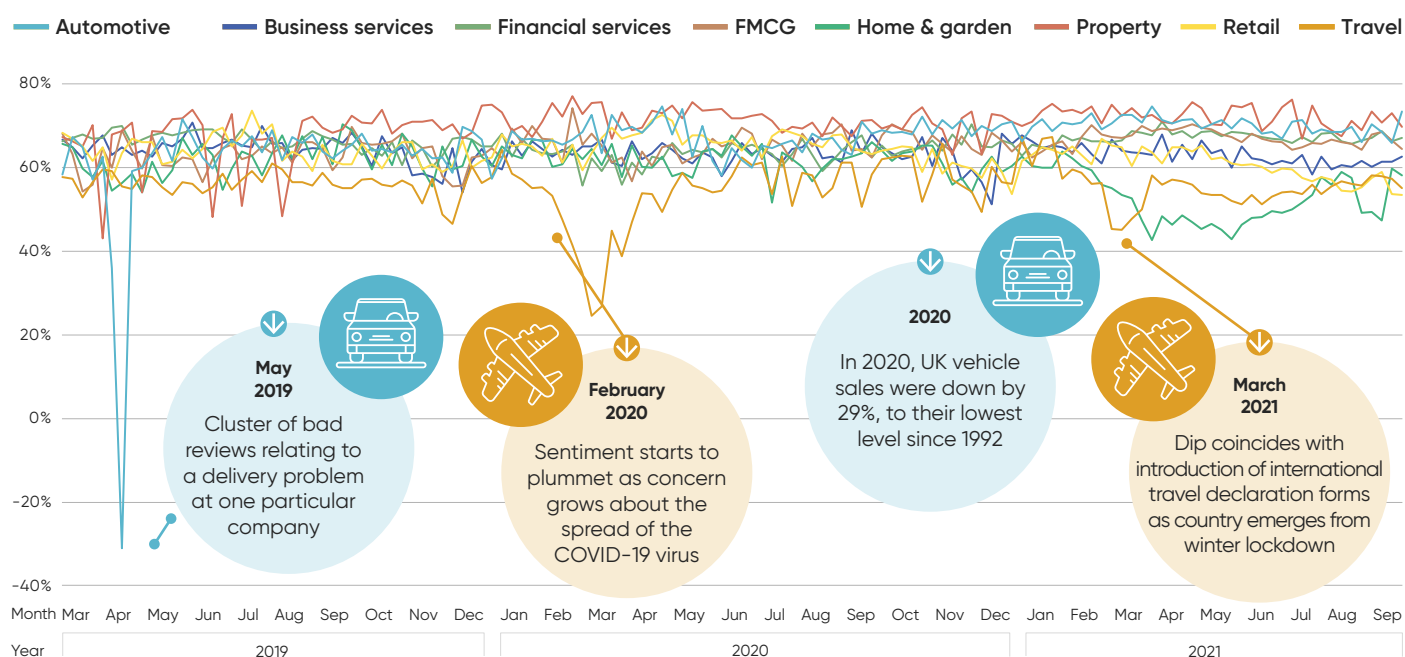
In travel and financial services, issue resolution took precedence, while in property the quality of the experience with the agency was vital. Conversely, in automotive, product issue handling trumped all other factors.

While each sector wrestled with its own particular challenges, the importance of getting the customer service fundamentals right never went away. Even though product quality was the biggest consideration for customers in automotive, the quality of a customer's digital experience came just after.

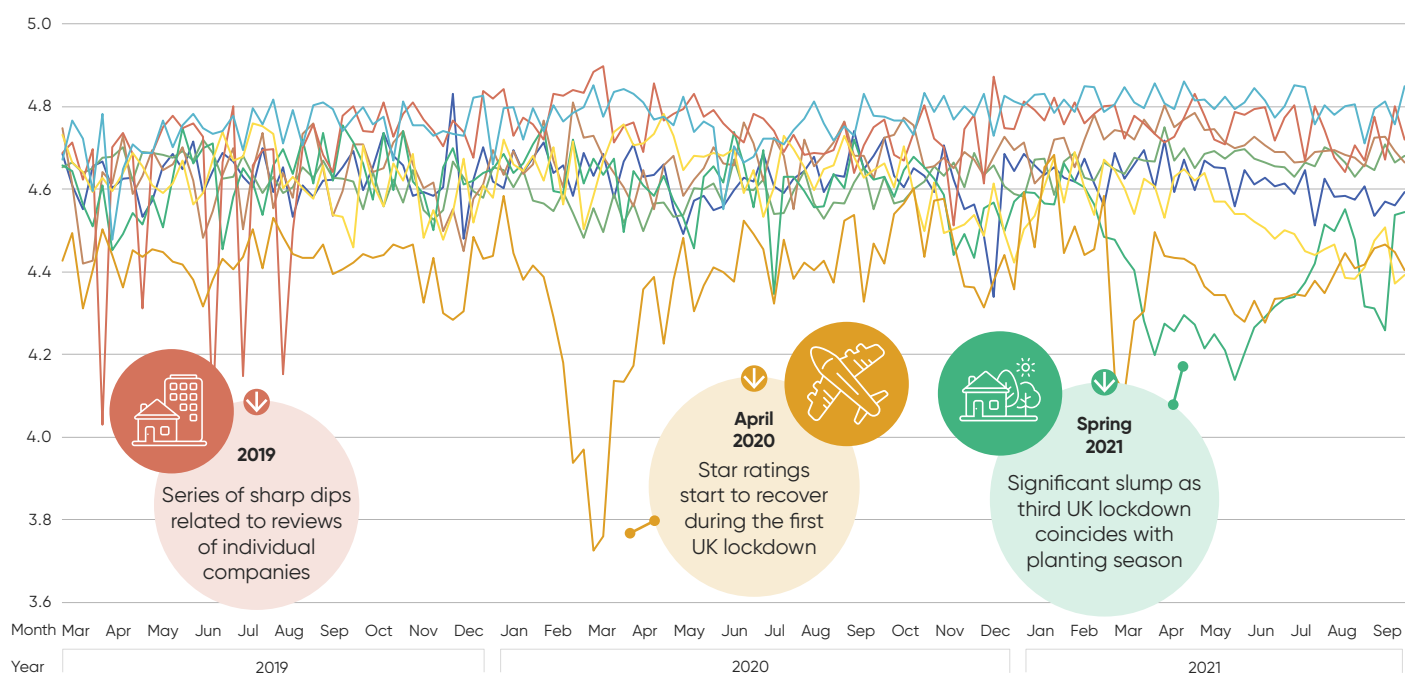
Sustainability

Climate change is the issue of our times, yet only a few reviews reflect this, mentioning eco-unfriendly packaging or delivery practices. This shows us that sustainability remains a brand perception issue, rather than a customer experience consideration. Customers are using reviews to rate individual transactions, rather than giving their opinion of a company. For brands wishing to show off their eco credentials, the focus must be on marketing to reach new customers.

Sentiment scores: all industries



Star ratings: all industries





Analysis of **5.1 million**
customer reviews shines
a light on where to focus

Introduction

Feefo, the world's largest verified reviews platform, has discovered just how good British companies really are at delivering a quality customer experience. Feefo has analysed over 5.1 million customer reviews submitted on its platform over the past two and a half years across eight key sectors:



Automotive



Business services



Financial services



FMCG



Home & garden



Property



Retail



Travel

Feefo's analysts have delved deep into customer sentiment data, star ratings and enduring trends to pinpoint exactly what's working for customers in each sector – and what isn't – and where businesses should be focusing their energies to outperform their competitors.

Time for a reset

Why now? The last two years have ripped apart the rule book when it comes to connecting with customers. Supply chain disruption, multiple and prolonged lockdowns, staff shortages, and booms in online shopping and services going virtual have changed customer service, forever. Now's the time for a reset.

Feefo reveals the fundamentals your customers will always care about, and where to invest to keep ahead of market trends, and your rivals.

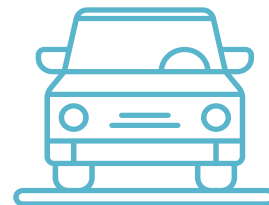


Sector analysis



Automotive

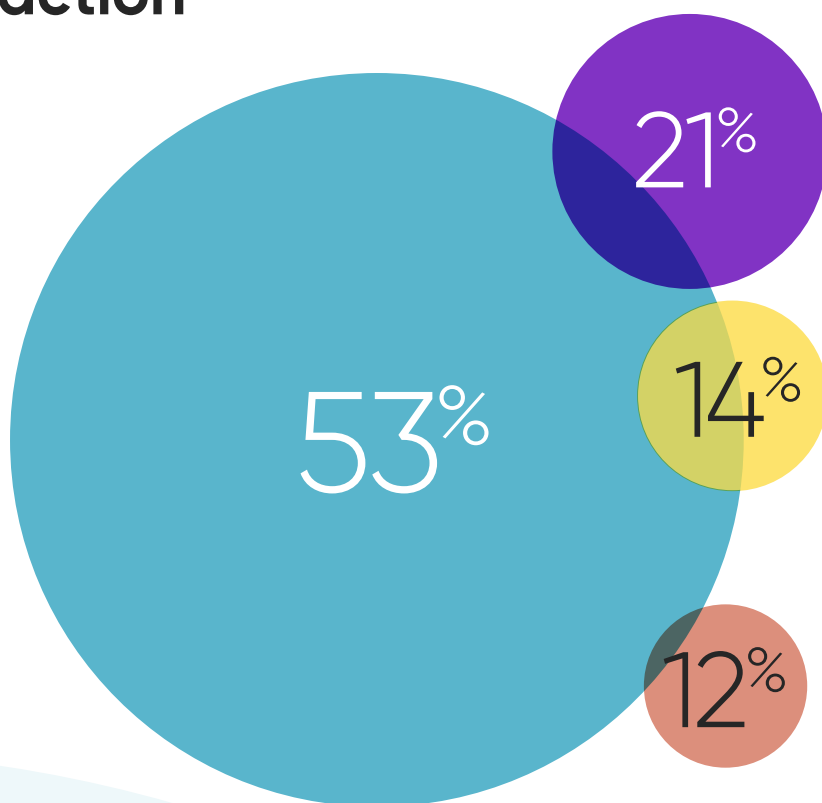
Sales slump in pandemic, but customer satisfaction stays high



Key drivers of customer sentiment in the automotive sector show where companies should invest to improve the customer experience they offer.

Key drivers:

● Issue with product/condition of vehicle	53%
● Customer service (quality of staff)	21%
● Digital experience (website/online processes)	14%
● Excellent overall experience	12%



People like:

- Friendly service
- Fast delivery
- Easy process



"I would definitely recommend my local dealership. Very professional and friendly service with all of my questions answered thoroughly." – Four-star review

People dislike:

- Having to return a newly-bought vehicle for repairs
- Poor service
- Waiting times longer than advertised or quoted



"Purchasing the car over the phone went well. The problem was when I returned to the collection point I was left waiting at least an hour to collect my new car, and on receiving it I was told it needed a service so I had to return in my own time to get this sorted. Service should have been done in the seven-day car prep time. Very disappointed." – One-star review

Automotive is the only sector where product issues are the most significant driver of star-rating variance. At 53%, product quality is nearly five times more important than in retail (11%), four times more important than in FMCG (13%), and almost three times more important than in home & garden (19%).

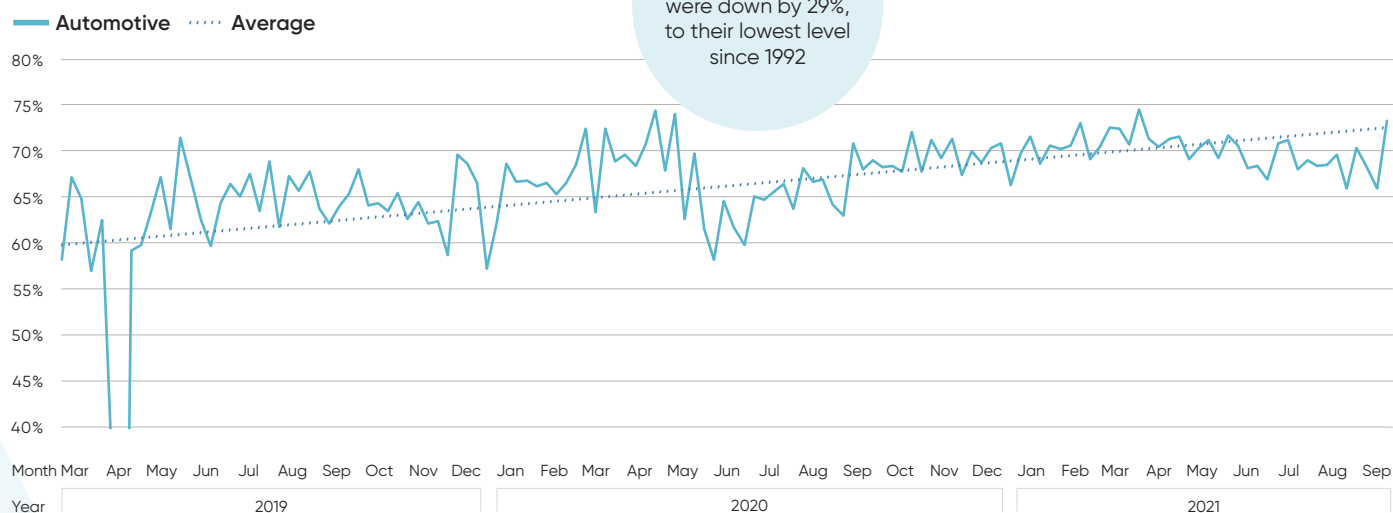
Analysis also shows that the only sector where the quality of the digital experience is more important than in automotive is travel (21% compared to 14%). Automotive purchases were already moving online before COVID-19 struck, but the process was turbo-charged by the pandemic, even as vehicle sales slumped to their lowest level since 1992.

However, the importance attached to customer service and quality of staff shows that automotive companies need to create a seamless, coherent experience across all marketing touchpoints. That means integrating interactive and personalised features, such as live chat and filtered product reviews to replicate high-quality human relationships online.

Product **quality is paramount** in the automotive sector. Customers care about the smallest details.

"Car paint on bonnet was damaged by bird droppings before delivery, and car was sold with paint protection which sealed in hologram marks in the paint. I was sent to a local paint repair shop who attempted to polish out the main mark, but it returned after the car was left in the sun. This destroyed my new car excitement and enjoyment. I sold the car back to garage as I could not live with the defects." – Two-star review

Automotive: sentiment scores



Business services

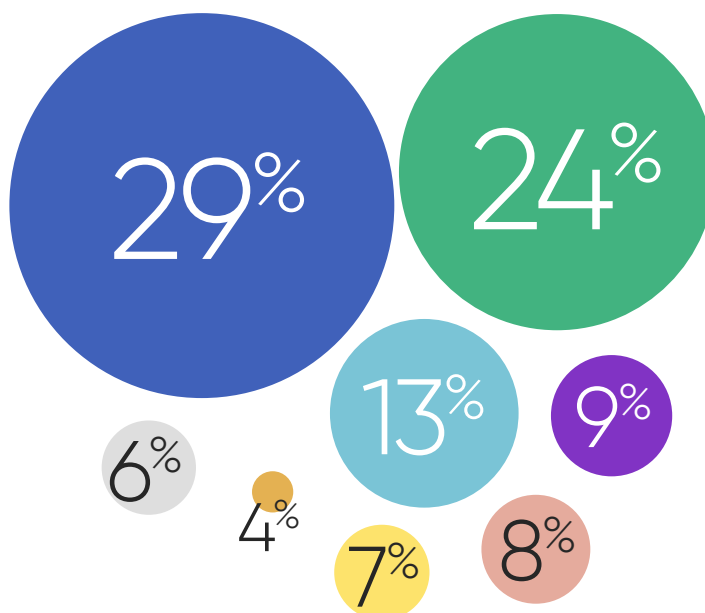


Quality of the sales process is more significant in B2B than any other sector

Key drivers of customer sentiment in the business services sector show where companies should invest to improve the customer experience they offer.

Key drivers:

Delivery issue resolution	29%
Sales/application processes	24%
Renewal processes/cost	13%
Customer service (helpful staff)	9%
Overall service and delivery	8%
Website/online processes	7%
Product features	4%
Other	6%



People like:

- Good customer service
- Having their questions answered
- Helpful staff



"The best thing I ever did – they are so friendly and put you at ease. Amazing customer service and well-trained people. Just brilliant." – Five-star review

People dislike:

- Poor customer service
- Having to contact customer services
- Late delivery



"Customer service diabolical, my goods were damaged in transit but despite paying to insure for the full amount, the claim was dismissed out of hand and they made no effort to contact the courier they had used for evidence of the damaged outer packaging." – Two-star review

Unlike B2C sectors, the B2B sales and purchase experience comes a close second in importance to delivery. Care taken delivering a high-quality customer experience during the sales process drives a more positive customer sentiment in B2B than it does in B2C.

This reflects the observations commonly made about the B2B customer experience compared to B2C – the sales process is generally longer and more complex, involves more people, and requires more proof points and numerical analysis.

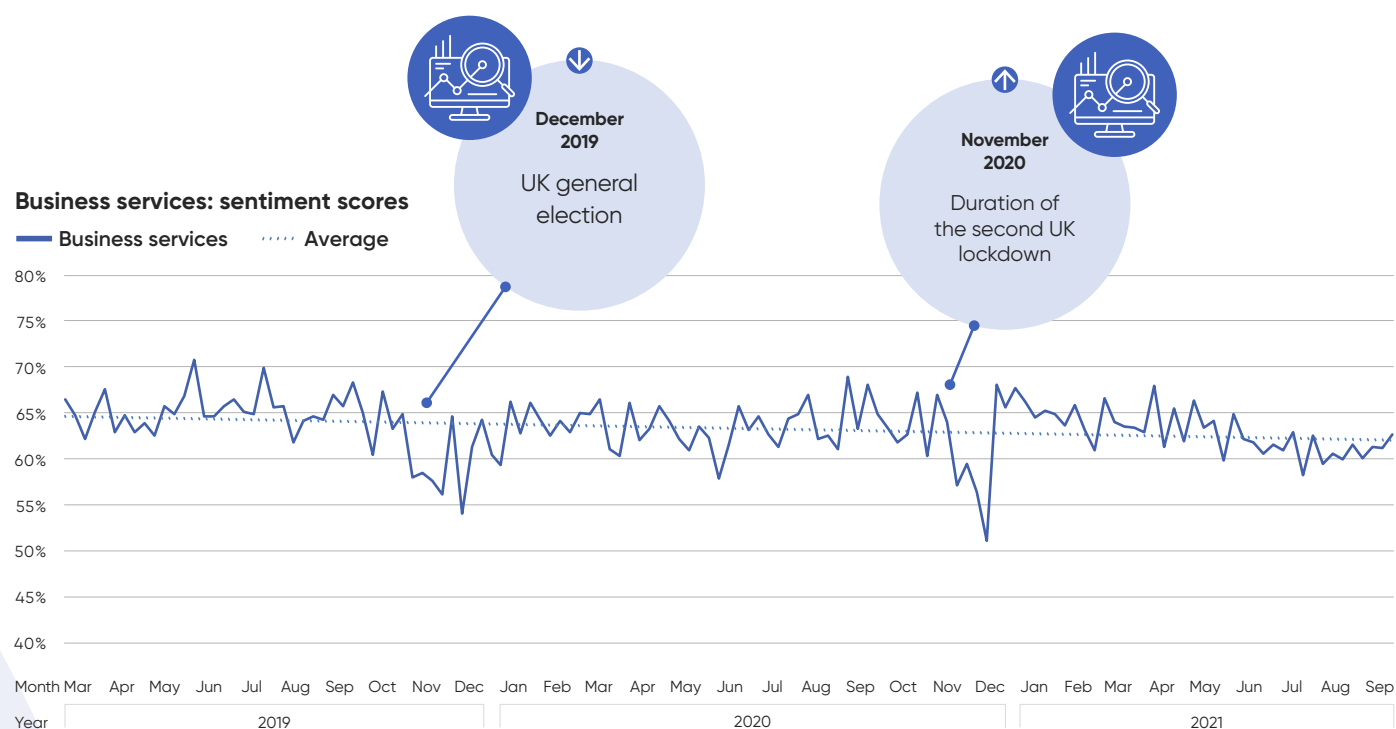
The sector timeline shows less variation in sentiment than some others. There are only two significant slumps, coinciding with the duration of the first two UK lockdowns. This indicates that B2B businesses struggled just as much in these periods as their B2C counterparts, but that during the rest of the

period, the active support that B2B brands provided their customers ensured that sentiment stayed stable.

This is backed up by anecdotal evidence from the reviews. The most mentioned phrases in positive reviews are around knowledgeable and helpful staff. “The staff were friendly, helpful, efficient and professional. No query or question was too much for them to deal with and respond. A calm haven at a stressful time.” is a typical example.

The sales process is more complex in B2B than in B2C, but **simplifying it drives higher customer satisfaction.**

“The process has been simplified over the years. The portal now makes it a lot easier to complete than before and the indicators to show where you need to expand the application or upload more evidence are great.” – Five-star review



Financial services

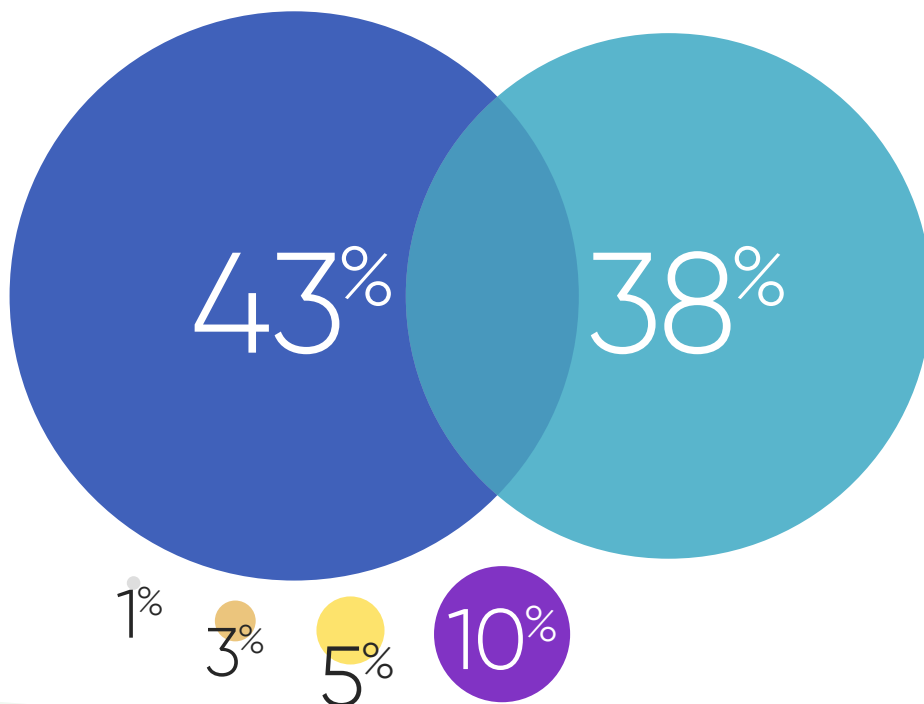


Helping customers is key to avoiding a cut-throat battle on rates

Key drivers of customer sentiment in the financial services sector show where companies should invest to improve the customer experience they offer.

Key drivers:

Issue resolution	43%
Pricing/rates	38%
Customer service (helpful staff)	10%
Website/online processes	5%
Good communication	3%
Other	1%



People like:

- Good customer service
- Quick and easy online processes
- Helpful staff



"Customer service was excellent, and all my issues have always been sorted with a kind and friendly attitude." – Five-star review

People dislike:

- Poor customer service
- Long and complicated claims processes
- High renewal quotes



"One of the worst customer service experiences I've ever had while dealing with [this company], which doesn't deserve even one star. If you're truly willing to become better at what you're doing (which is hard to believe), become more people-oriented, treat your customer as an individual and put yourself in his/her position in order to see the full picture and try to resolve the issue so that both you and the customer are satisfied with the final outcome." – One-star review

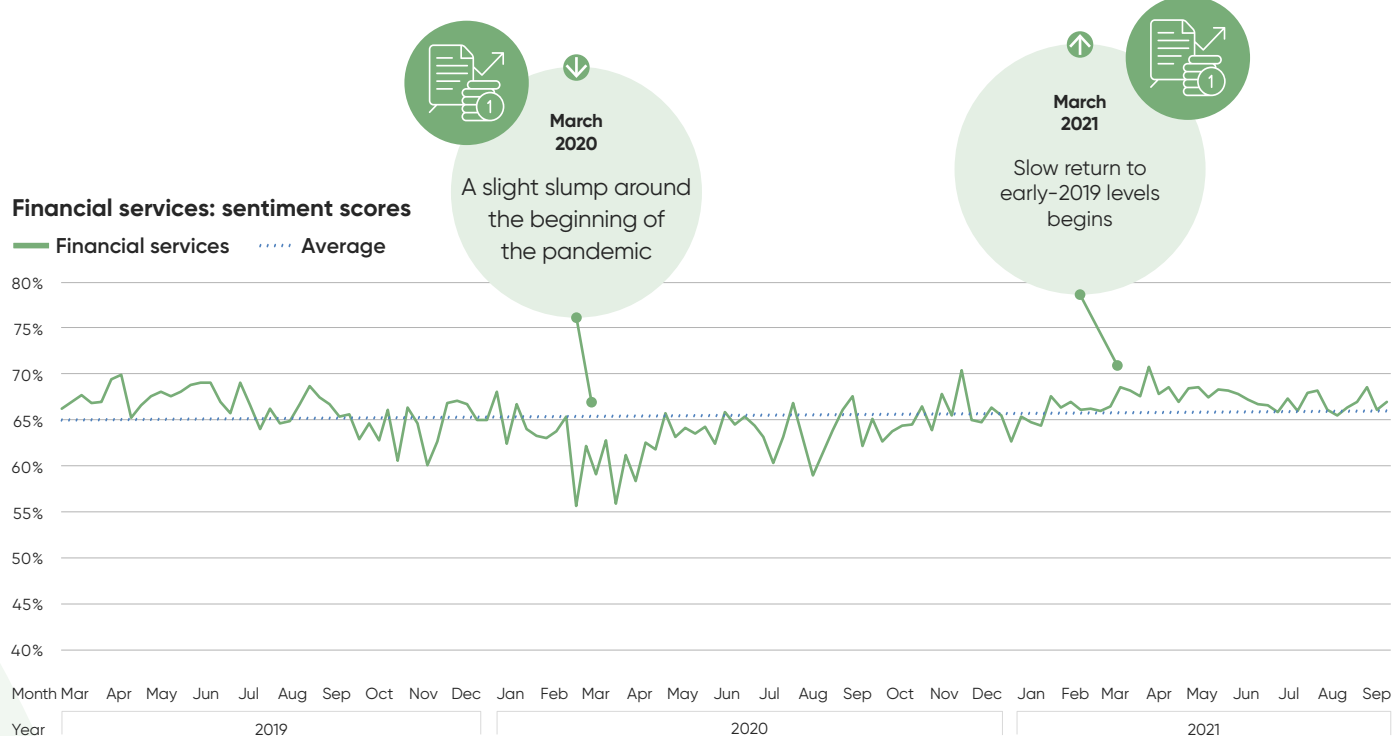
Pricing (38%) is a far more important driver of customer sentiment in financial services than in any of the other sectors featured in this report. Travel, with rates and rewards at 19%, is the only other sector where pricing plays a significant role in customer experience.

The emphasis on pricing or rates in financial services is driven by the rise of comparison sites and the industry focus on persuading people to switch providers. To avoid the risk of a 'race to the bottom', marketers in the sector should note that pricing is still trumped by issue resolution (43%) as a key driver, even before customer service (10%) and other customer experience-related drivers are factored in.

Issue resolution and fantastic service are increasingly becoming points of differentiation within the sector. Therefore, the use of reviews is particularly important, allowing consumers to easily compare providers. To compete, companies don't just need to resolve any issues quickly and positively, they should make it easy for prospects to see how existing customers feel about the level of service provided.

Price matters to customers, but they want great service too.

"Easy to use and excellent customer service. Heard brilliant things about the company. Very competitive price too." – Four-star review



FMCG

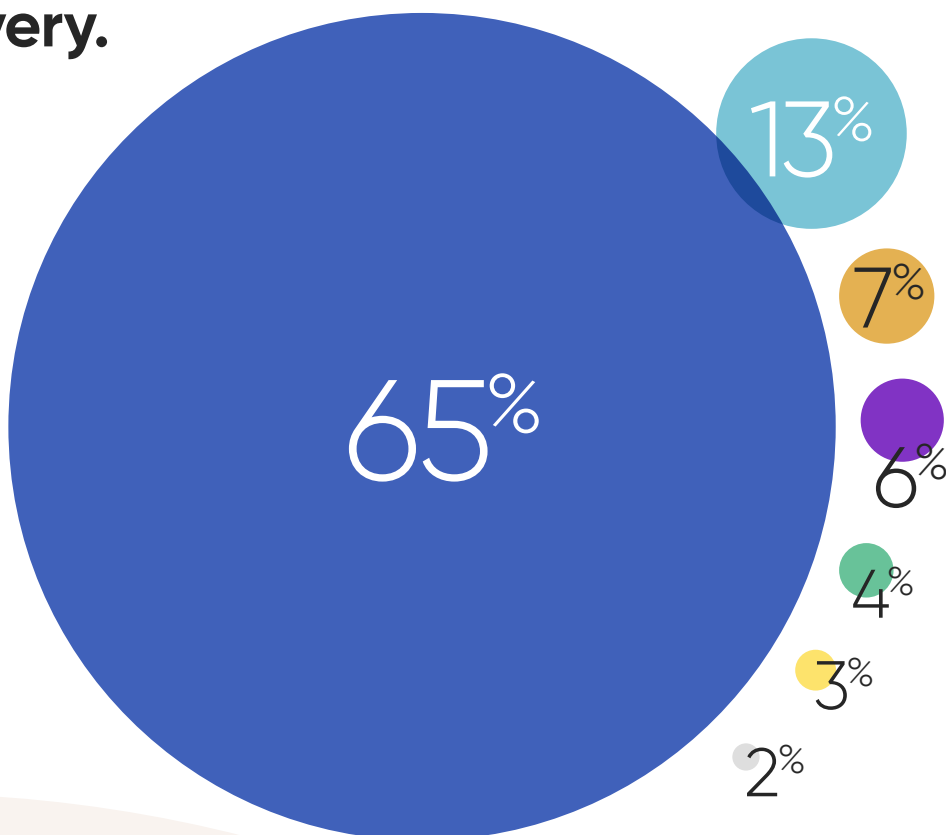


FMCG customers care more about getting their purchases than anything else. That creates particular challenges when a pandemic disrupts supply and delivery.

Key drivers of customer sentiment in the FMCG sector show where companies should invest to improve the customer experience they offer.

Key drivers:

Delivery issue resolution	65%
Product quality	13%
Good range of products	7%
Customer service (helpful staff)	6%
Timeline delivery	4%
Website/app/online processes	3%
Other	2%



People like:

- Orders arriving in good condition
- Easy-to-use website
- Pleasant delivery drivers



"Despite the problems with COVID-19 and the problem of a heatwave causing some delay in despatch, my order still arrived in excellent condition and well within a reasonable delivery time." – Four-star review

People dislike:

- Not getting a reply to emails chasing late deliveries
- Poor customer service
- Items missing from an order



"Took nearly three weeks for my order to arrive, I had to call numerous times and spent probably an hour and a half in a queue. I had to send many emails. Will not use them again and do not recommend." – One-star review

The FMCG sector is dominated by delivery issues more than any other – it's five times as important in driving the variance in sentiment as product quality. Collecting and sharing reviews on both product and service is therefore critically important for success in the new landscape.

Over the study period, supply chains and delivery services were massively disrupted, businesses had to adopt new digital ways of working, and customer demand for online shopping surged (global peak delivery volumes in November 2020 were up 25.4% year-on-year¹). Yet the sector only saw a slight fall in its sentiment score, from 68% in April 2019 to 64% in October 2021.

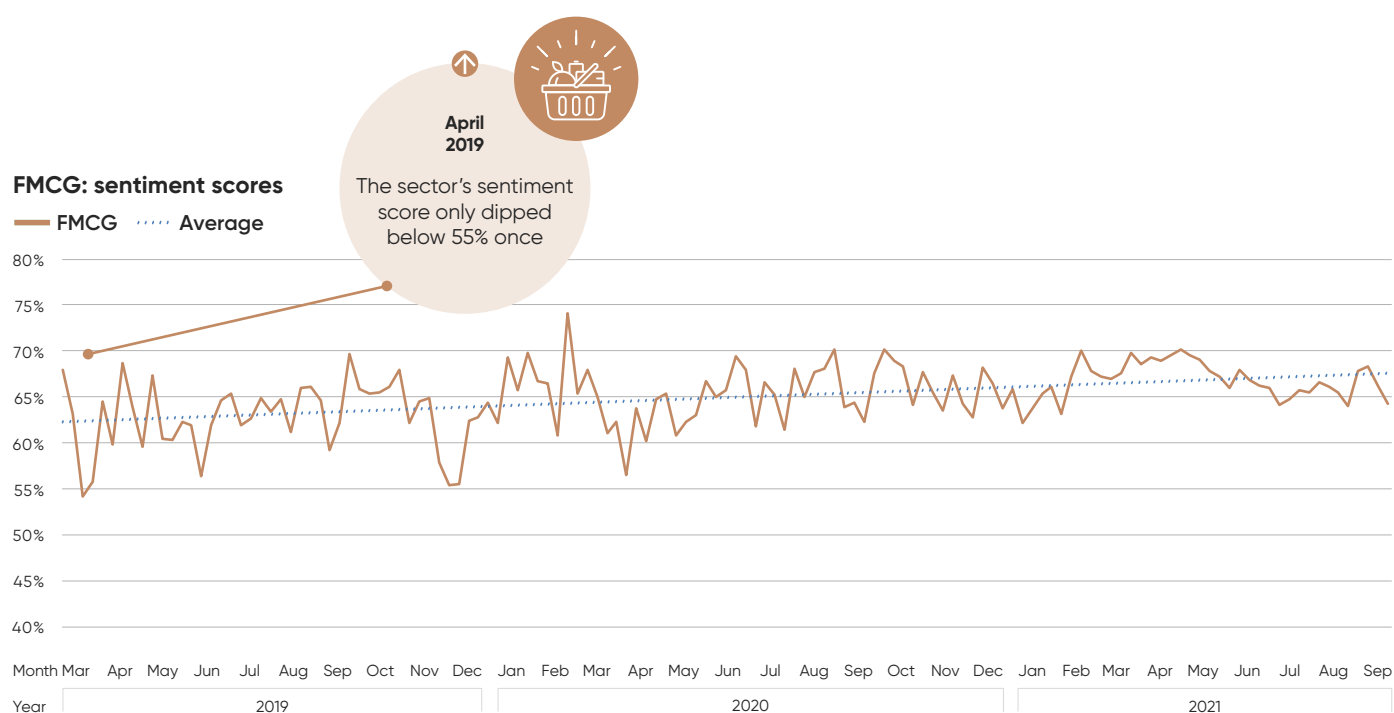
This achievement becomes even more important in the context of the digital advertising rethink which followed Google's decision to withdraw support for third-party cookies in its Chrome browser. Brands with a direct relationship with their customers have the ability to collect first-party data,

giving them a significant advantage in this new world. FMCG brands traditionally sell through retailers, making it imperative for them to build direct-to-consumer (D2C) relationships. This is a major reason behind the rise of D2C offerings in this sector.

Many brands going D2C will already have good brand awareness and strong reputations for product quality, so it's now about nailing operational factors to attract and retain new customers. Collecting and sharing reviews on both product and service is therefore critically important for success in this new landscape.

Embrace complaints as a way of reassuring other customers that **any issues they have will be resolved quickly and easily.**

"Prompt delivery, helpful driver. Unfortunately two items were missing. We phoned the shop and the manager answered. He was very polite and helpful; arranged a refund and even offered to deliver one of the missing items himself." – Four-star review



¹ <https://info.metapack.com/LP-Peak-delivery-trends-2021.html>

Home & garden

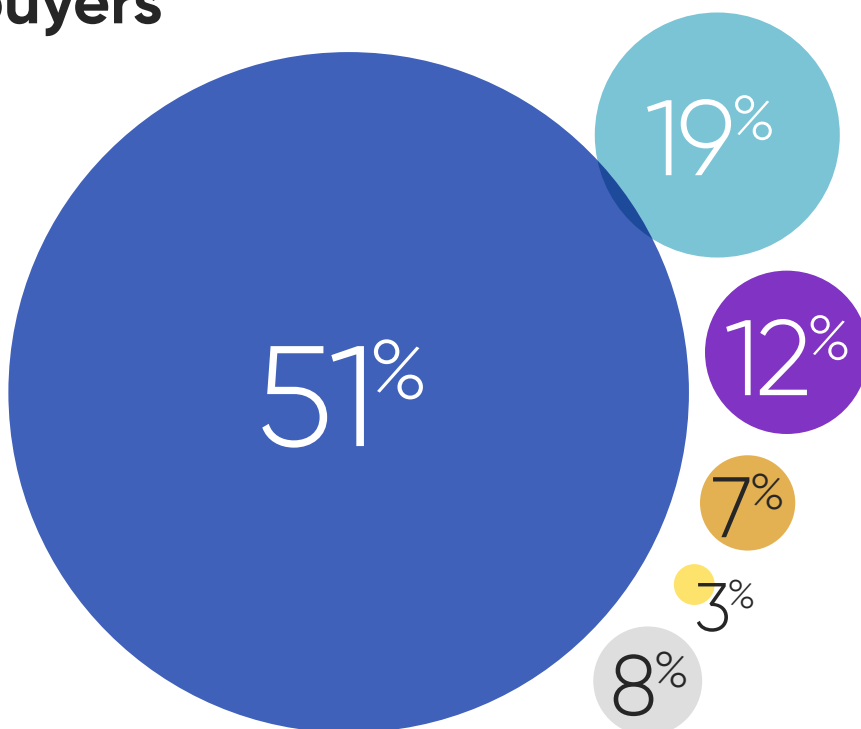


Reviews are crucial to reassure nervous plant buyers

Key drivers of customer sentiment in the home & garden sector show where companies should invest to improve the customer experience they offer.

Key drivers:

● Delivery issue resolution	51%
● Product quality	19%
● Customer service (helpful staff)	12%
● Packaging/products intact	7%
● Website/online processes	3%
● Other	8%



People like:

→ Good customer service



"I have already been in touch with customer services directly and the problem was swiftly resolved." – Four-star review

People dislike:

→ Poor customer service
→ Poor quality, dead or dying plants
→ Orders not delivered



"Delivery is taking ages, more than 20 days waiting, still no tracking number. Contacted customer service, the explanation was poor and no solution or timeframe at all. Shocking service with what you charge for your products." – One-star review

The drivers of customer sentiment in the home & garden sector are very similar to those of retail, with both dominated by delivery issue resolution. The major difference between the two sectors is that product quality is almost twice as significant in home & garden (19% vs. 11%).

Individual reviews show these differences are largely due to the more sensitive nature of plants and delicate homeware, and the resulting difficulty of transporting them safely. Although packaging is a minor driver for both sectors, it's twice as important in home & garden (7% vs. 3%). All this means it's even more important for home & garden brands to optimise their end-to-end customer experience, and to share their positive reviews in this area.

What's also striking is the lack of reference to environmental issues. These rarely appear in either this or the retail sector,

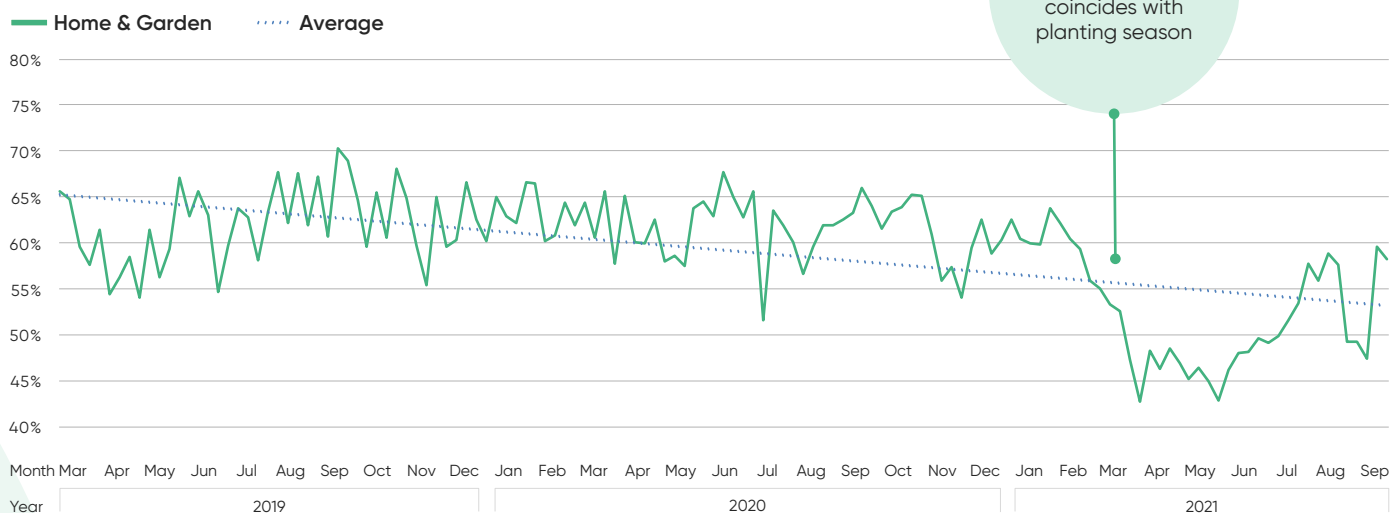
apart from a few positive mentions of recycled packaging.

Home & garden is one of the sectors that faced the most serious sentiment issues during the period under review, seeing a fall from 66% in spring 2019 to 58% in autumn 2021. The most significant slump occurred in early 2021. This coincides with the third UK lockdown, and also the key planting time for gardeners. Reviews from the period show meeting delivery dates and demand was an issue for home & garden companies during this period.

Reviews showing you address delivery issues can reassure nervous buyers. But it's a fine balance between that and alienating prospective customers who might feel they can get better service elsewhere.

"Item arrived broken, then the customer service was worse than useless. Refund finally arrived after a good deal of phone calls. If you are not geared up to do efficient online, I would suggest you don't do it." – Two-star review

Home & garden: sentiment scores



Property

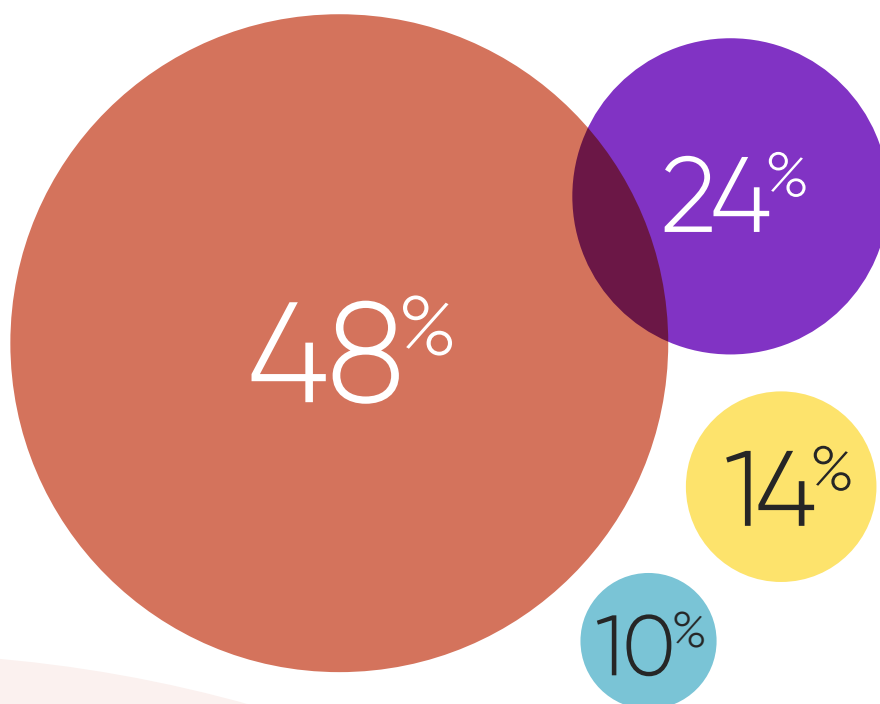


The quality of the customer experience is all that matters

Key drivers of customer sentiment in the property sector show where companies should invest to improve the customer experience they offer.

Key drivers:

- Negative experience with agent **48%**
- All-round professional service **24%**
- Communication and query handling **14%**
- Satisfaction with property or deal **10%**



People like:

- Professional, efficient service
- Having their questions answered
- Friendly staff



"Highly professional, friendly and communicative service and a pleasure to deal with. A difficult situation made so much easier by a great team who have shown a level of service that inspires trust and confidence. Highly recommended as an estate agent who care." – Five-star review

People dislike:

- Poor service
- High agency fees
- Poor communication from agents



"Unable to get hold of anyone. Leave messages and no calls are returned. Done nothing to sell house. Poor service all round." – One-star review

In the property sector, the purchase or rental experience is (almost) everything. Satisfaction with the resulting property – rather than the experience on the path to purchase – accounts for just 10% of the variance in star ratings. Instead, it's all about the quality of service.

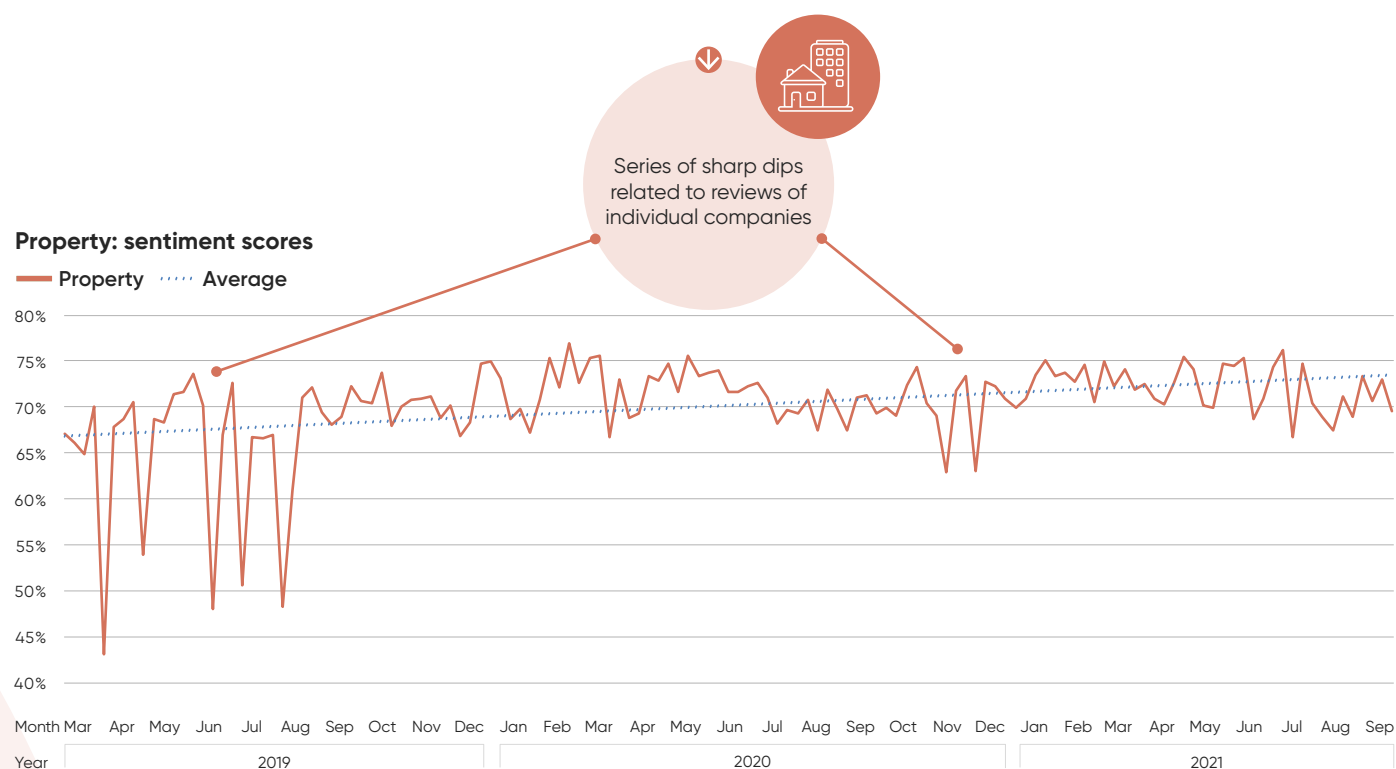
The results reinforce the popular image of estate agents, with the behaviour of individuals the biggest driver of negative sentiment. More importantly, adding in broader service issues takes the influence of customer experience quality to 86%.

Despite this, the sector is one of the highest scorers in terms of the overall number of positive reviews. It comes second,

just ahead of FMCG (which saw 83% five-star reviews). This shows how the increasing use of digital technology is pushing the sector forward but, unusually, indicates the need to replicate online service levels offline. It also demonstrates that property brands able to promote positive reviews for their customer service will have a powerful competitive advantage.

Addressed right, bad reviews can be good for business. But in sectors with a poor reputation, good reviews are even better.

"In the past six months we have had dealings with many estate agents and others involved in the conveyancing process. Almost without exception we have been disappointed (sometimes extremely) with our experiences. This company has been the exception. They have been professional, helpful, friendly and knowledgeable throughout. They have made a very stressful time bearable. I so wish we had sold our property through them." – Four-star review



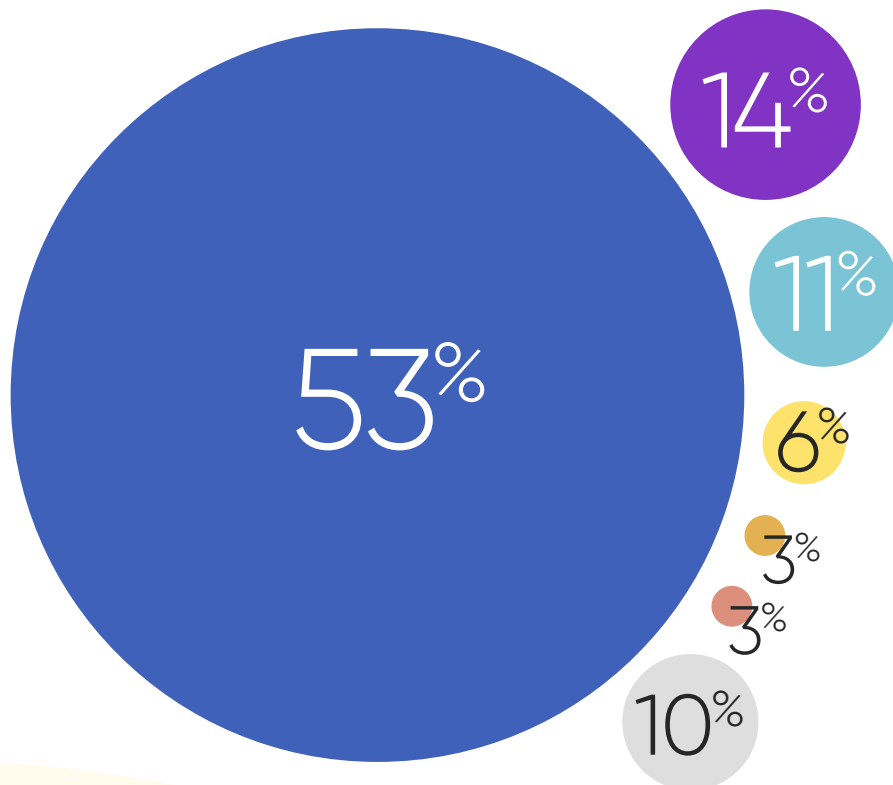
Retail

It's all in the delivery

Key drivers of customer sentiment in the retail sector show where companies should invest to improve the customer experience they offer.

Key drivers:

Delivery issue resolution	53%
Friendly/helpful staff	14%
Product quality	11%
Website/online processes	6%
Packaging	3%
Great overall service	3%
Other	10%



People like:

- Easy-to-navigate websites
- Being kept up-to-date about progress of deliveries
- Value for money



"Couldn't fault it. The website was easy to navigate, payment and checkout simple. Had text and email updates as to when parcel was to be delivered." – Four-star review

People dislike:

- Late deliveries
- Having to pay to return faulty or incorrect orders
- Poor quality



"Been waiting three weeks for my order and still hasn't turned up! The communication has been a joke, can't talk to anyone, deffo won't be buying from here again! If there was a 0 star option I would have picked that." – One-star review

When people shop online, a successful delivery outweighs every other consideration. Delivery is nearly five times as important as a driver of positive customer sentiment than quality of product, and almost nine times more important than the actual online shopping experience.

Retail was among the sectors that had to change most to meet the demands of the pandemic. People went online to shop as lockdowns were introduced (by February 2021, nearly three-quarters of Britons said they were shopping more online than they had before the pandemic²). At the same time, the sector faced disruptions to its supply chains, as well as difficulties with deliveries.

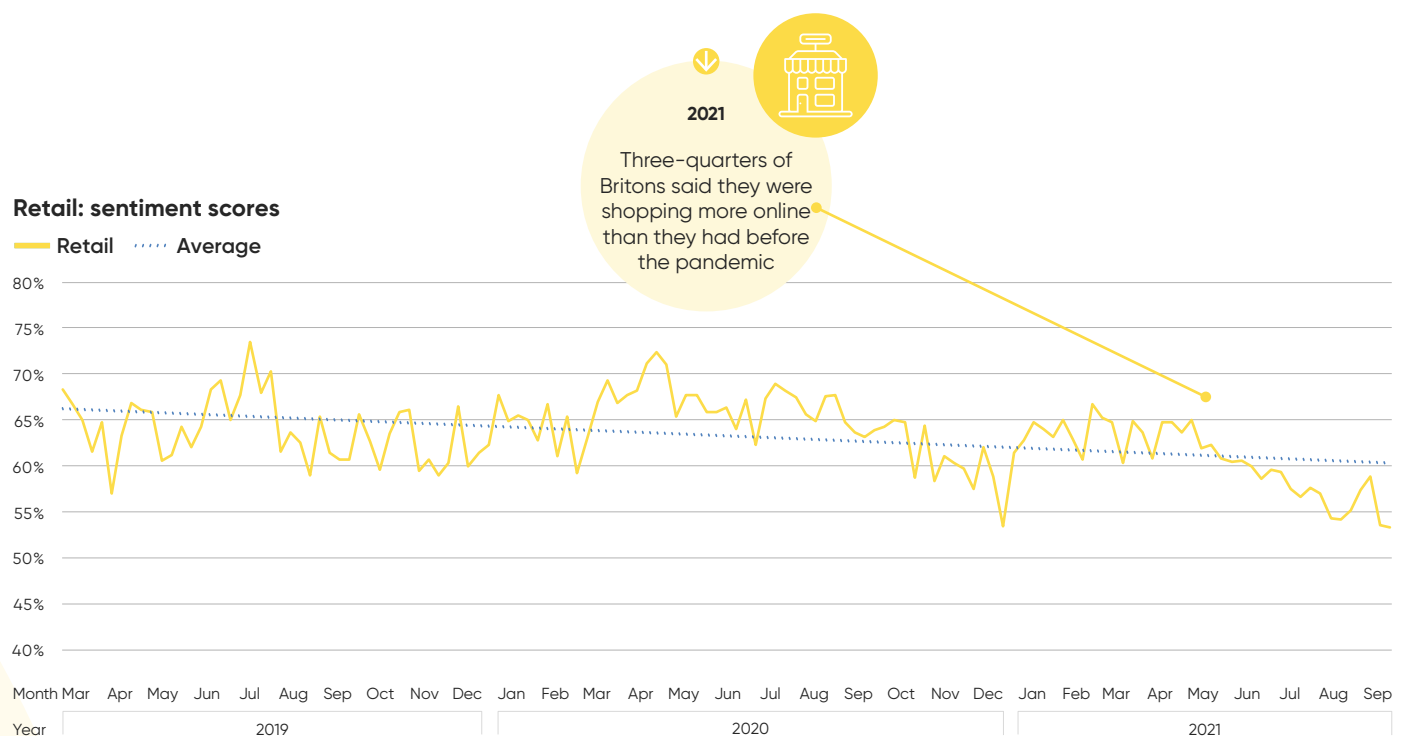
Analysis of the Feefo reviews suggests the sector has struggled to meet these challenges. Average sentiment

fell significantly over the period (from 68% in spring 2019 to 53% in autumn 2021), while the graph for star ratings shows a steady decline from a high in late March 2020.

So the overall message to online and multichannel retailers is that the first places to look for improvement are your delivery and issue resolution processes. That means not just making them equal to (or better than) those of your immediate competitors, but also compared with the best in the world, because that's the benchmark your customers are using.

Communication is key. Customers are generally forgiving of delivery issues if they're kept informed about what's going on.

"Poor customer service, no updates, no-one explains to me even though I've asked where my delivery is. I downloaded the app and still no update. Literally been waiting nearly three weeks for my t-shirt and still waiting." – One-star review



² <https://www.statista.com/statistics/1230225/changes-in-online-buying-among-uk-consumers-since-covid-19/>

Travel

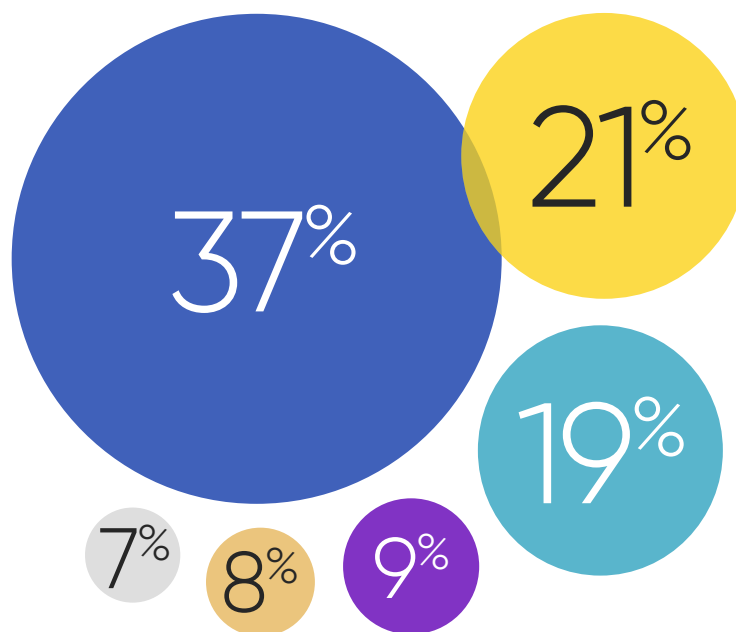


Pandemic bites hard but good reviews still outweigh bad

Key drivers of customer sentiment in the travel sector show where companies should invest to improve the customer experience they offer.

Key drivers:

● Issue resolution	37%
● Booking process/website	21%
● Rates and rewards	19%
● Customer service (quality of staff)	9%
● Food and accommodation	8%
● Other	7%



People like:

- Having their questions answered
- Friendly and helpful staff
- Easy-to-use websites



"Amazing prices!! Answered all my questions and helped me find exactly what I wanted. Great options." – Five-star review

People dislike:

- Problems with credit cards (cards being charged without notice, cards not being accepted, problems with payment systems)
- Issues with rental cars booked as part of the overall package
- Poor customer service



"Don't give out bad information. I was told that my credit card would only be charged the amount of the rental for four days plus tax. Turns out they added an extra \$200 as a hold, for what I can't imagine, which was more than a week-long rental itself. Bad business." – One-star review

Travel was all but obliterated by COVID-19, but during the pandemic more than two-thirds of reviewers still gave their travel companies five stars. Even in the initial stages, when flights were being cancelled and borders closed, positive sentiment towards the sector outweighed negative.

Travel was the sector hardest hit by events during the period of time under review.

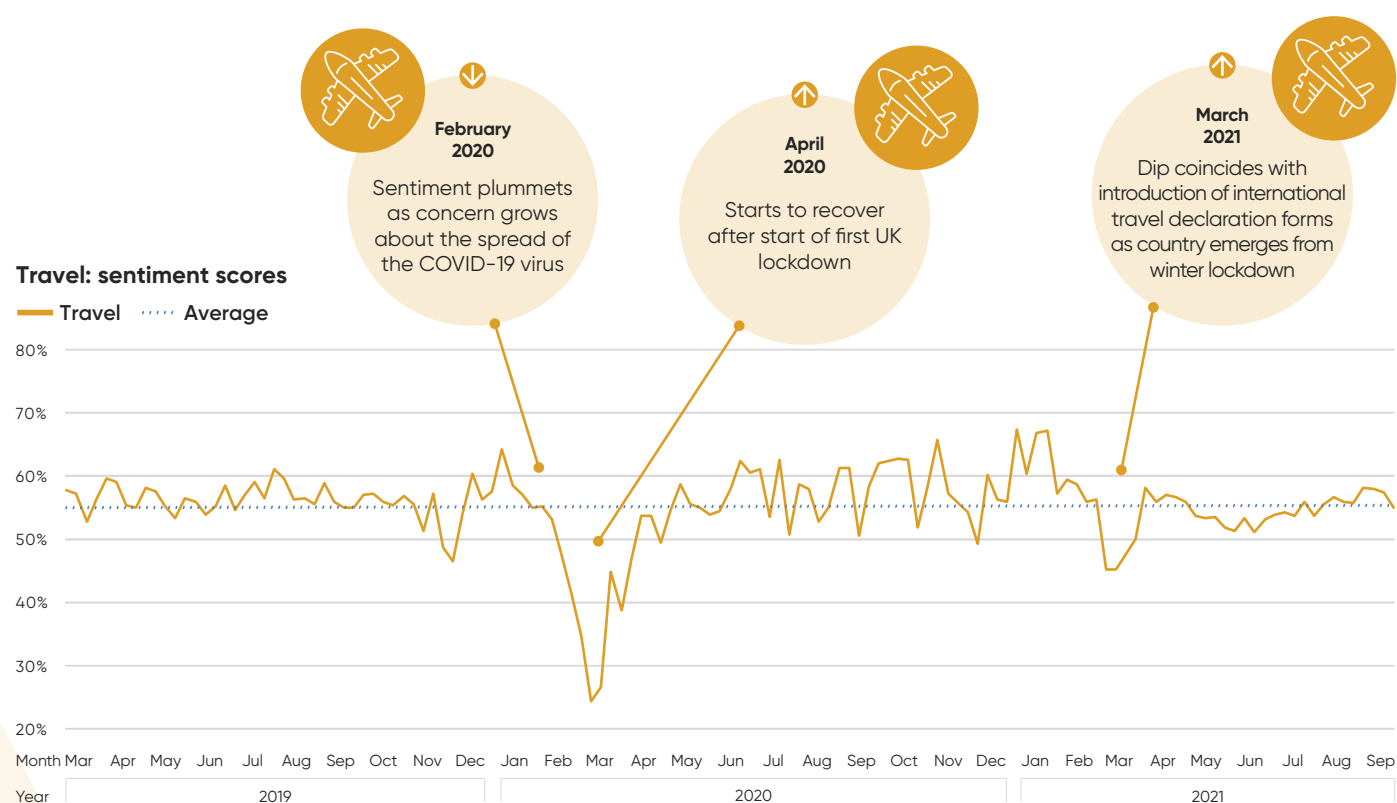
It's therefore hardly surprising the sector saw the lowest proportion of five-star reviews across the period. But despite this, almost two-thirds of all travel reviews were five-star, and the proportion of four-star reviews was at least double that of almost any other sector.

The timeline shows a period of massive instability beginning in December 2019. The initial slump reflects people's problems

booking holidays for the coming summer following the UK's departure from the EU. Sentiment then plummets as concern grows about the spread of COVID-19, and starts to recover as the first UK lockdown is announced, suggesting that clarity around holiday bookings helped relieve concerns. But even in these two months, negative sentiment – particularly about customer service – is outweighed by positive, with far more reviewers praising travel company staff and websites as they rebook existing holidays.

Travel customers **want value for money**, and they'll call out both low and high prices. But they're more **likely to be upset by prices that increase** during the booking process.

"When we pressed the last button to confirm booking, the price increased. When I pressed the button to confirm with the increased price, the price went up again. This happened three times and the price increased more than \$300." – One-star review



Key takeaways and recommendations



Understand what is **driving sentiment** and strength of ratings scores in your sector

Focus your efforts accordingly, but also ensure that sentiment analysis is part of your broader marketing, customer experience and business strategies.



Customers understand that mistakes happen

How you fix them will determine what they say about you.



Invest in **reputation** through reviews

Good reviews and high star ratings give reassurance to prospective customers, which is particularly important for new brands.



Empower customer service staff to **resolve complaints quickly** and easily

Invest in digital customer support to help them manage customer expectations.



Don't overreact to bad reviews

Don't let a few negative voices lead you to change things in ways that would upset the silent (and satisfied) majority.

Methodology



Feefo commissioned London Research to analyse the star ratings and text from more than 5.1 million customer reviews between May 2019 and October 2021 to determine the key drivers of sentiment for each of the eight sectors. Using regression analysis we were able to determine the relative impact of each factor in driving the star-rating variance. Feefo and London Research would like to thank Wordnerds for the use of their technology platform to help analyse the content of reviews. Wordnerds uses advanced linguistics and machine learning to group topics by what customers are talking about, whatever language, spellings or colloquialisms they are using.



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