

2022

Australian
Service Index

GAMBLING & SPORTS BETTING
SECTOR REPORT

ASi



Foreword

I'm thrilled to present the results of the inaugural Australian Service Index - an Australia wide study, designed to provide insight into how Australians feel about customer service provided by the organisations they products and services from, and to identify ways for Australian organisations to improve their delivery.

Our research comes as organisations face increasing pressure in this period of ongoing crisis brought about by the global COVID-19 pandemic and its impacts.

As Australia's authority on customer service we have published this white paper to support organisations in creating and delivering better outcomes and experiences for their customers. The full 2022 Australian Service Index is available to CSIA's corporate members or by request to CSIA.



Jeremy Larkins

Executive Director

The Customer Service Institute of Australia



ABOUT THE RESEARCH



Our approach



15 categories

A detailed exploration of a range of industries, and the customer service landscape overall



10,095 Australians

A robust, sample of Australian consumers



Weighted data

Sample weighted by age and gender to the 2021 ABS Census to ensure representivity.



Nationally representative

Talking to Australians in all states and territories.

Industry questioning

- Australian consumers surveyed about three industry groups that they've communicated with in the last 12 months... our participants were asked:

The brands...

- Which brand(s) have they most recently contacted?

How and why...

- Why did they contact the brand?
- How did they contact the brand...in person, phone, email, SMS, chatbot, live chat, mail, social media or another way?

Their satisfaction...

- Was their issue resolved?
- How did they feel post-interaction?
- Overall satisfaction
- Overall ease of use
- Overall trustworthiness
- Net Promoter Score

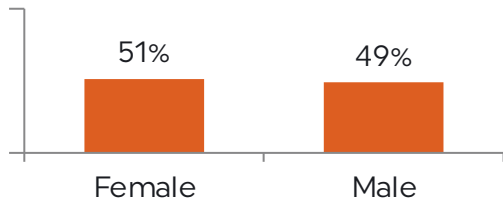
Opportunities for improvement...

- Did the brand solicit feedback?
- What could they have done to improve their service deliver?

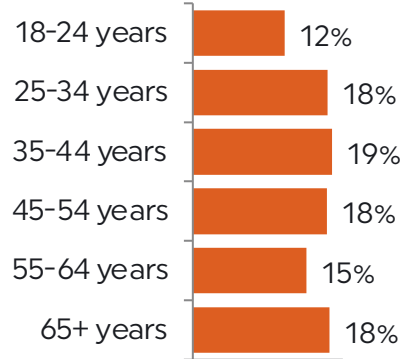
Who did we speak to? (cont'd)

Sample demographics

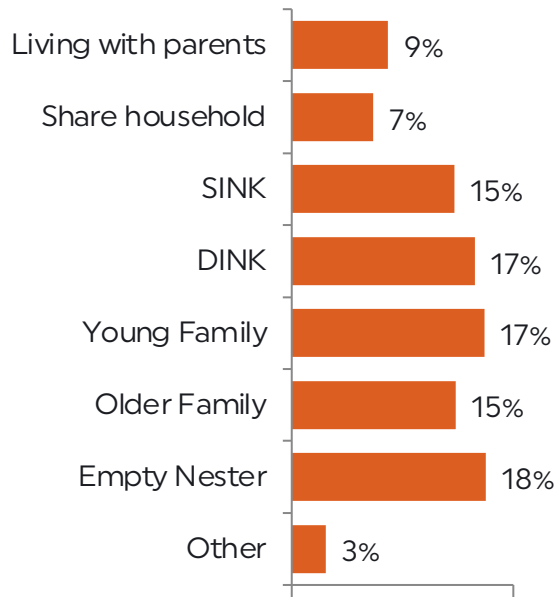
Gender



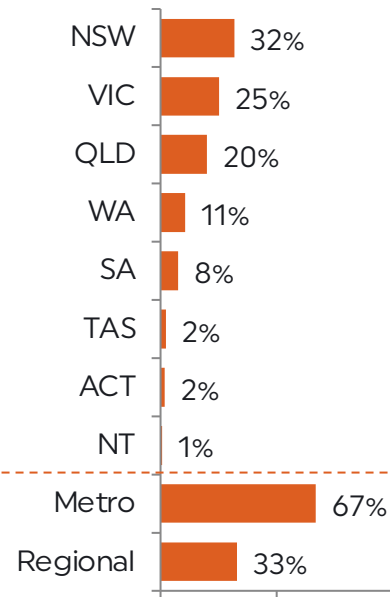
Age



HH Composition



Location

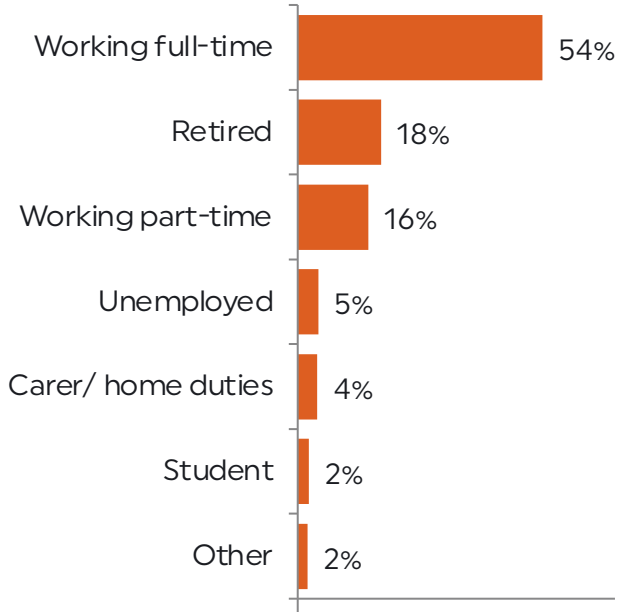


Base: total sample
n=10,093, weighted

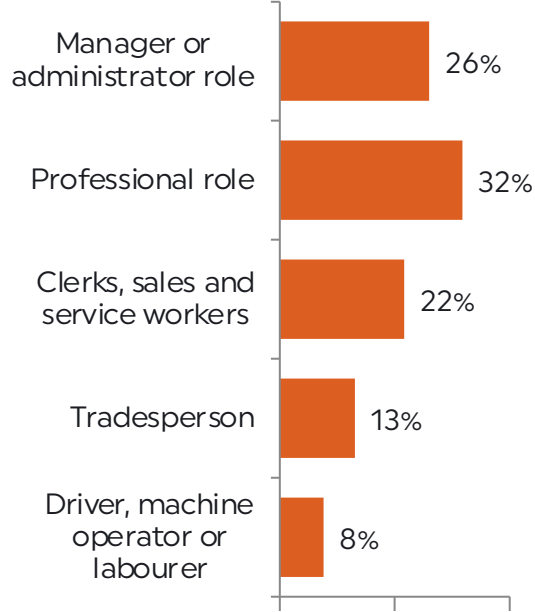
Who did we speak to? (cont'd)

Sample demographics

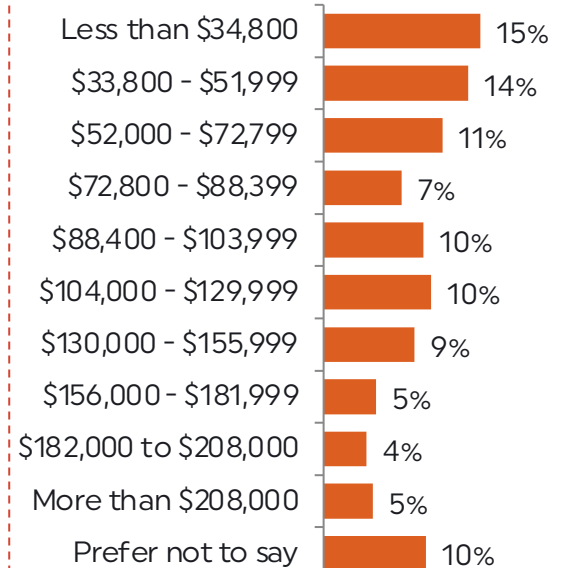
Employment



SES



Income



Base: total sample
n=10,093, weighted

CUSTOMER SERVICE NOW

How Australians see the current state of customer service.

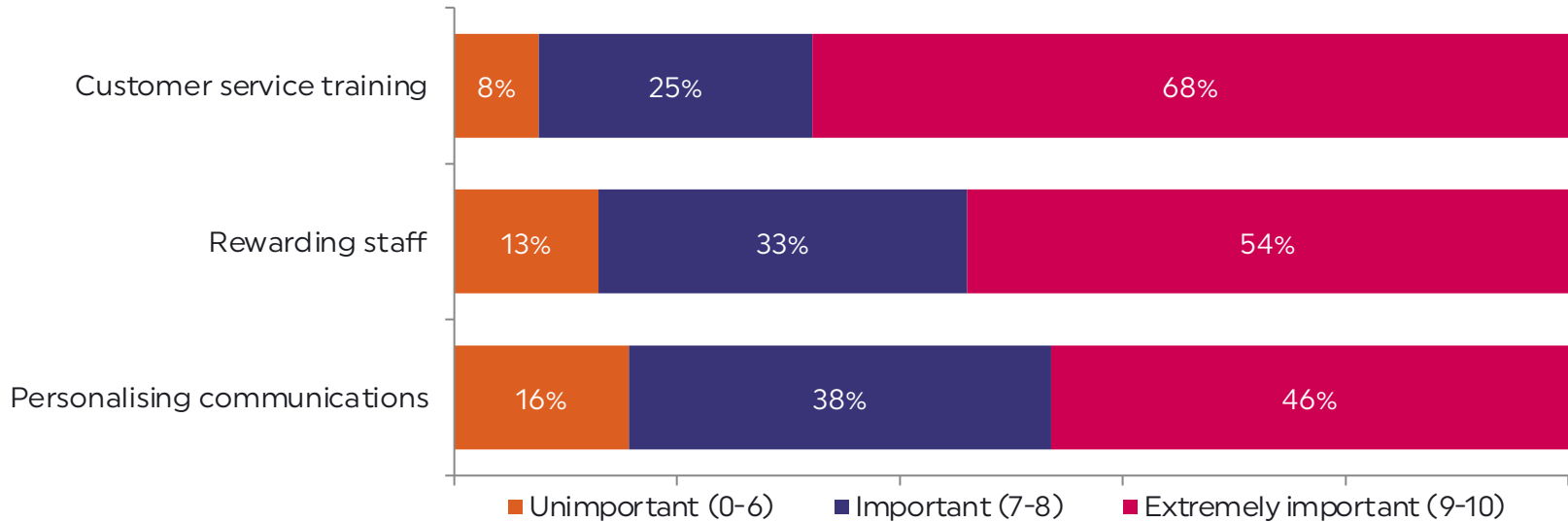


Two-thirds of Australians think training is essential in creating good customer service

Q34 - Please rate how important you think customer service training is to ensuring staff deliver good customer service?

Q35 - How important do you think it is to reward staff for providing good customer service?

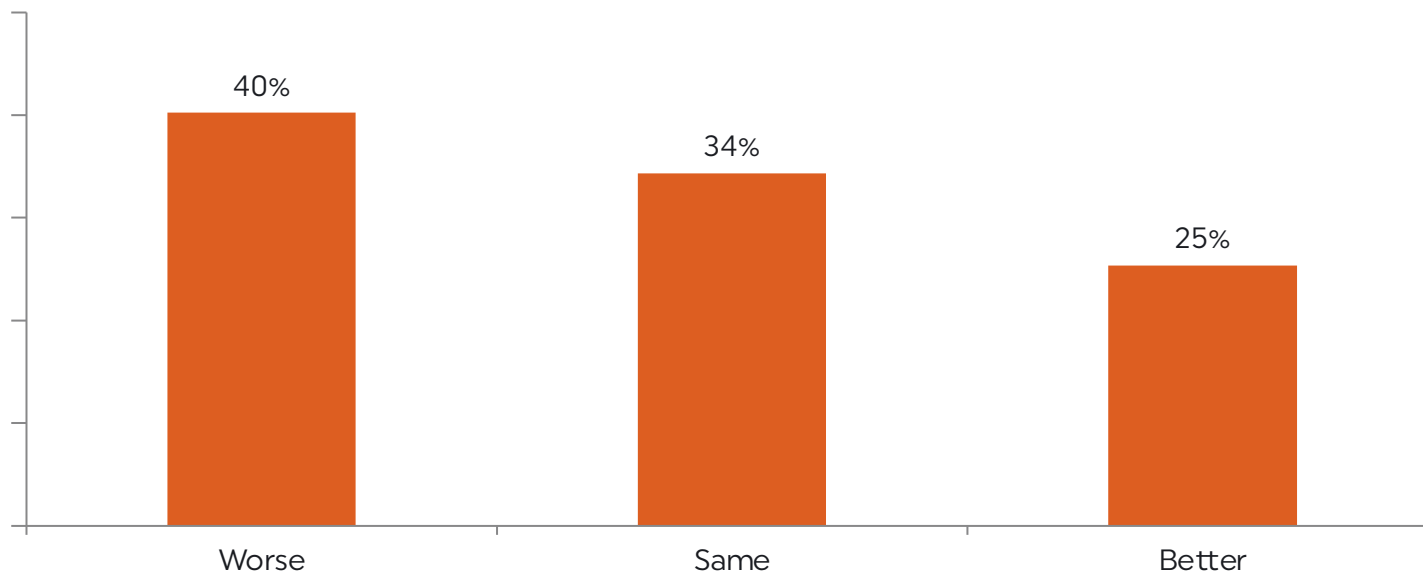
Q35B - How important do you think it is to personalise customer service communications to you?



Base: total sample
n=10,093, weighted

Four in ten Australians think customer service has worsened since COVID

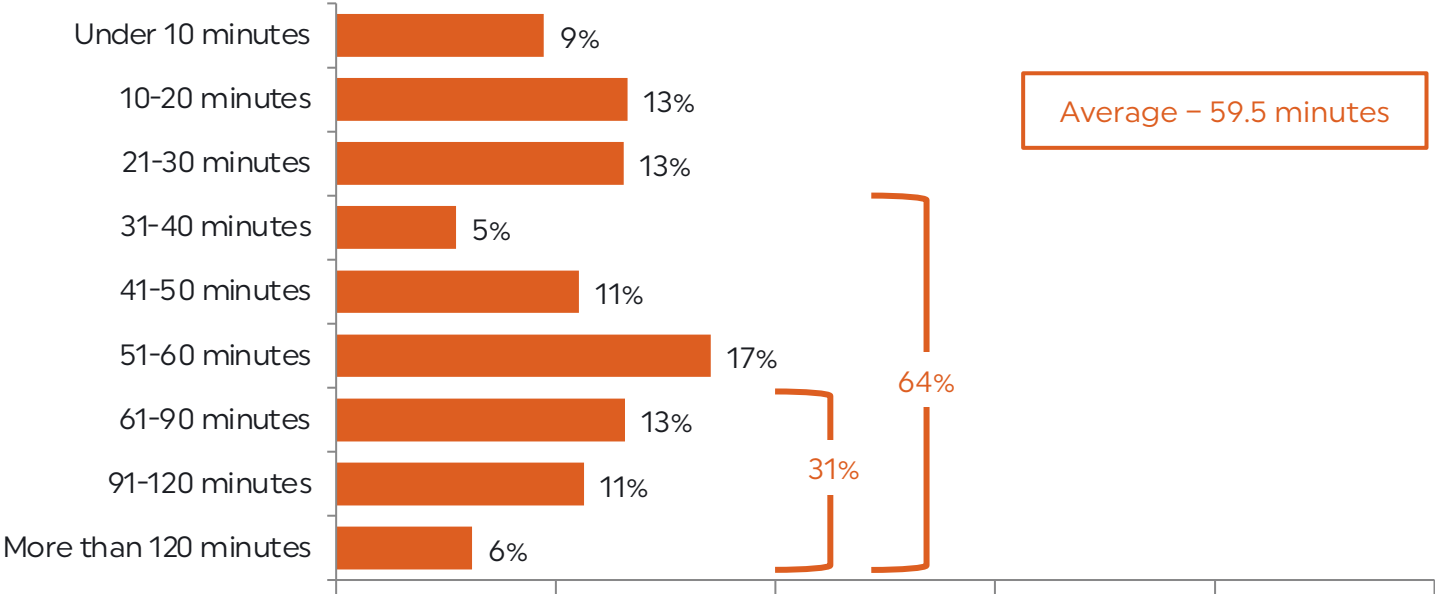
P3 - Has accessing help / customer service got better or worse since COVID?



Base: total sample
n=10,093, weighted

A third of Australians have waited more than an hour on hold to speak to customer service

P1 - What's the longest you have ever waited on hold to speak with customer service person?



Base: total sample n=10,093, weighted



Almost two-thirds have waited more than 30 minutes in the past.

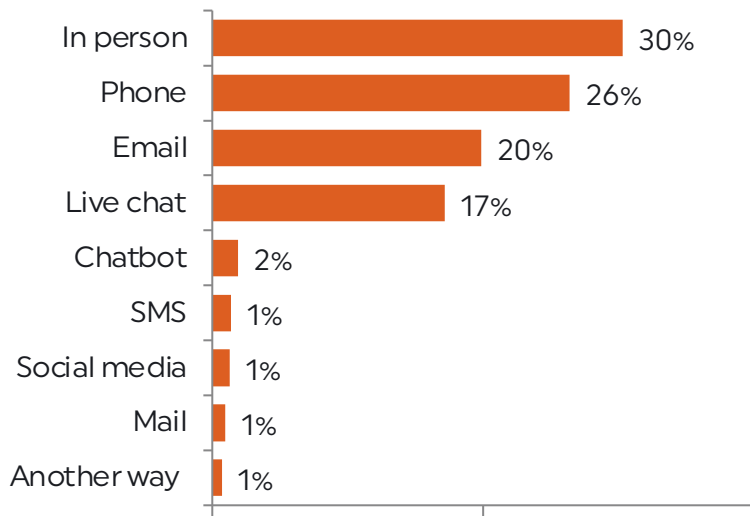


Most Australians prefer talking in person to customer service

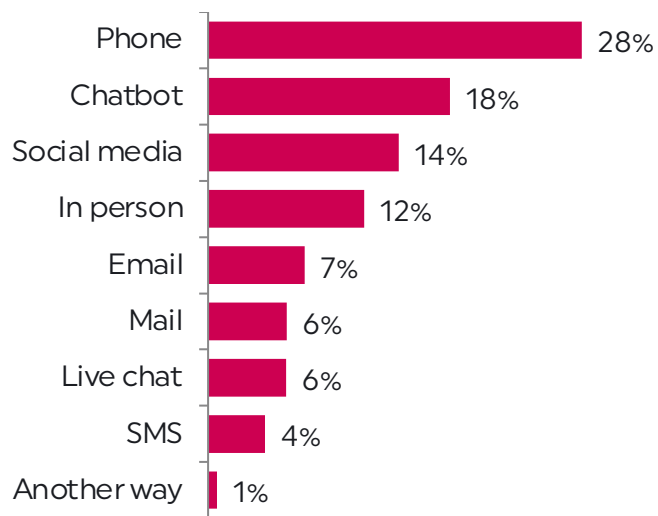
P4 - What is your favourite customer service channel to use?

P5 - What is your least favourite customer service channel to use?

Most favourite channel



Least favourite channel

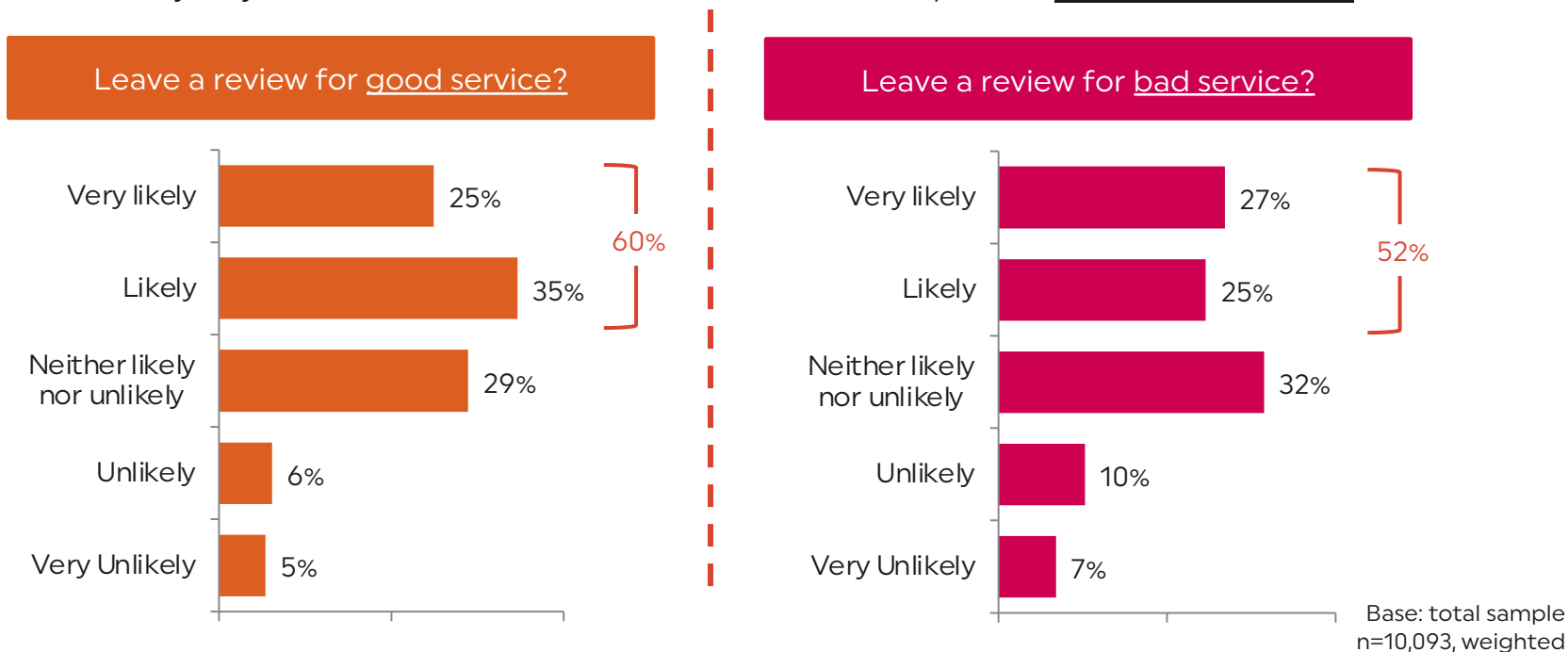


Base: total sample
n=10,093, weighted

Australians are more likely to leave a review for good service than bad

P6 - How likely are you to leave a customer review for a business that has provided great customer service?

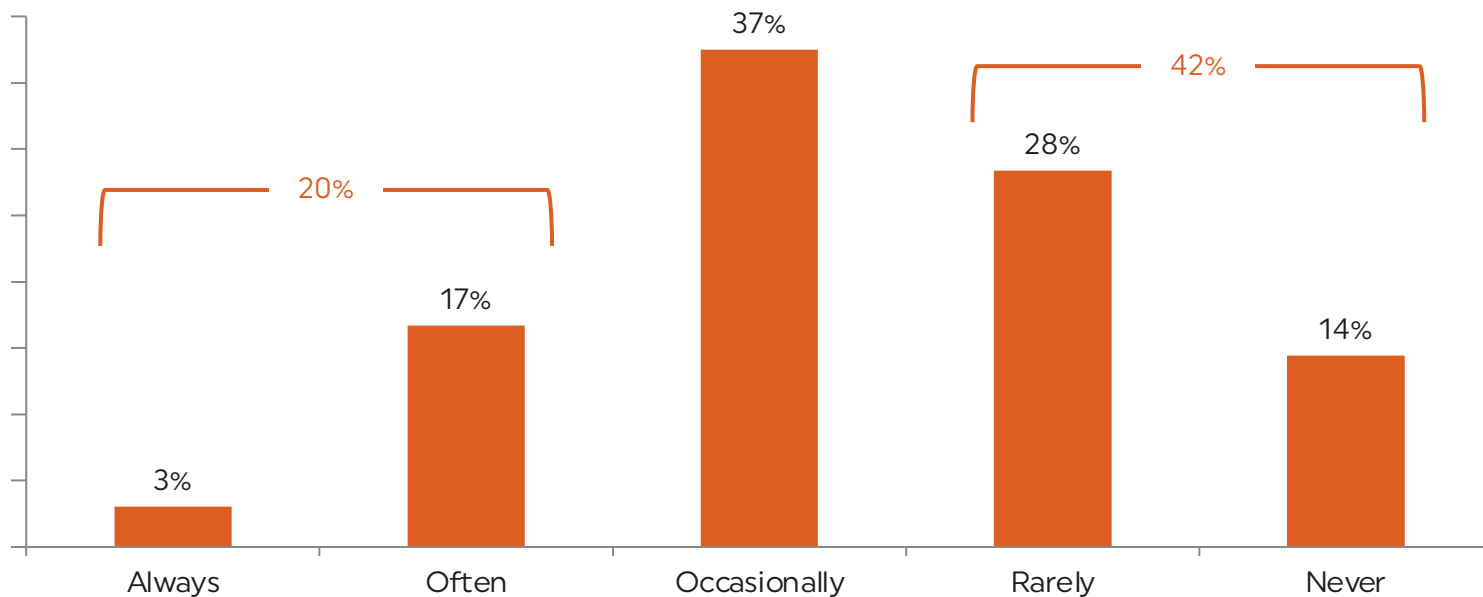
P7 - How likely are you to leave a customer review for a business that has provided poor customer service?



60% would likely leave a review if it was good, while only 52% would if it was bad.

One in five Australians always or often leave a review for service they've received

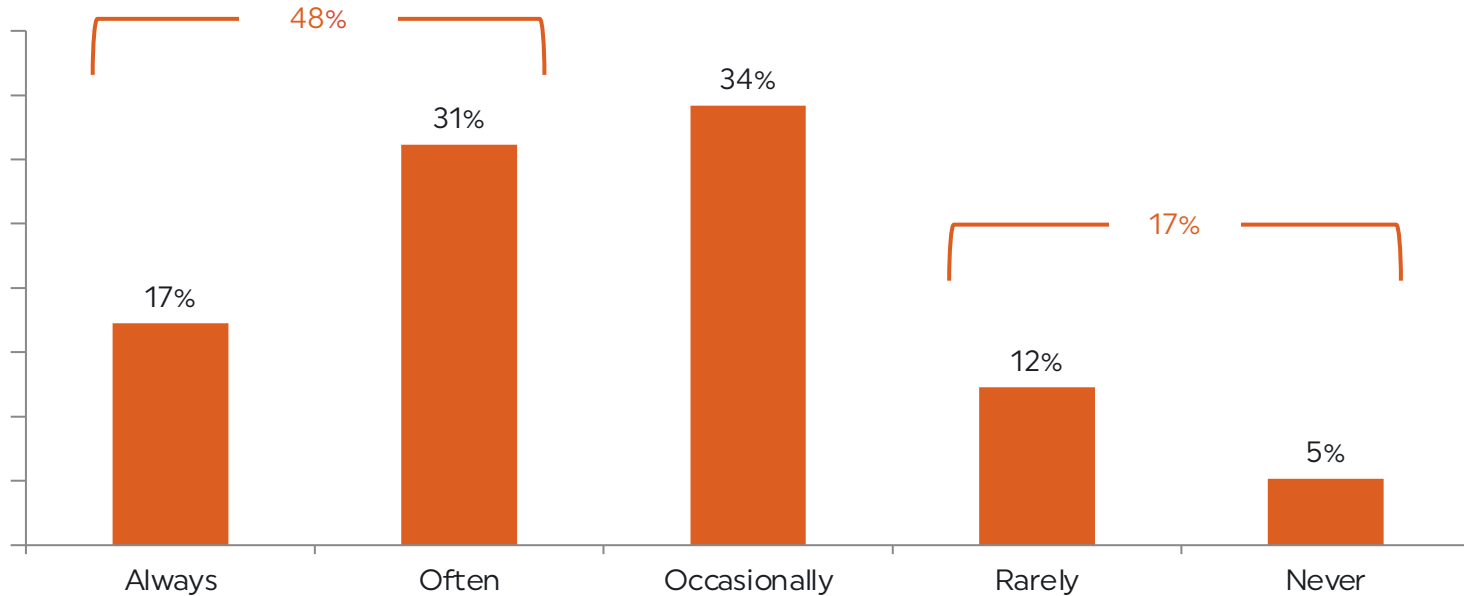
P8 - How often do you leave reviews about the service you have received?



Base: total sample
n=10,093, weighted

But they're far more likely to tell other people about their experience

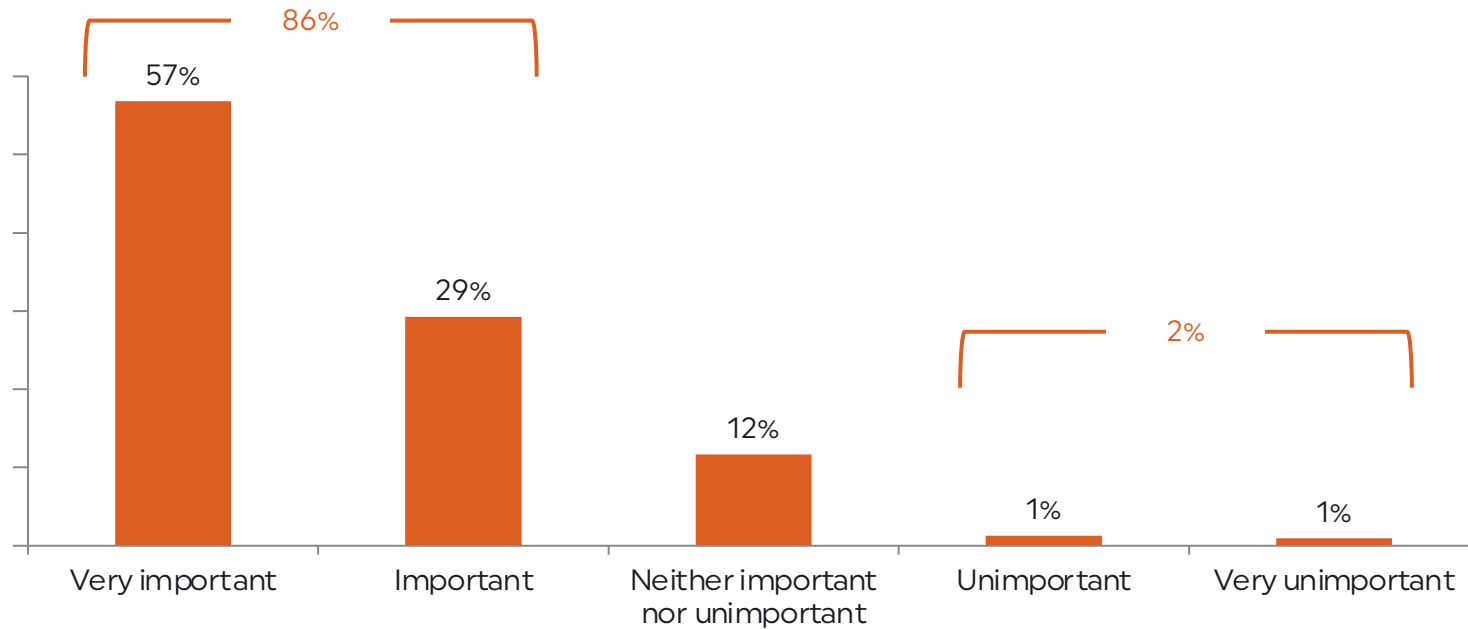
P9 - How often do you tell others about a poor service experience you have received?



Base: total sample
n=10,093, weighted

Almost nine in ten Australians feel having an Australian-based call centre is important

P10 - Is having a local / Australian based call centre important?



Base: total sample
n=10,093, weighted

More than half of Australians feel that having local call centres is a good predictor or good customer service

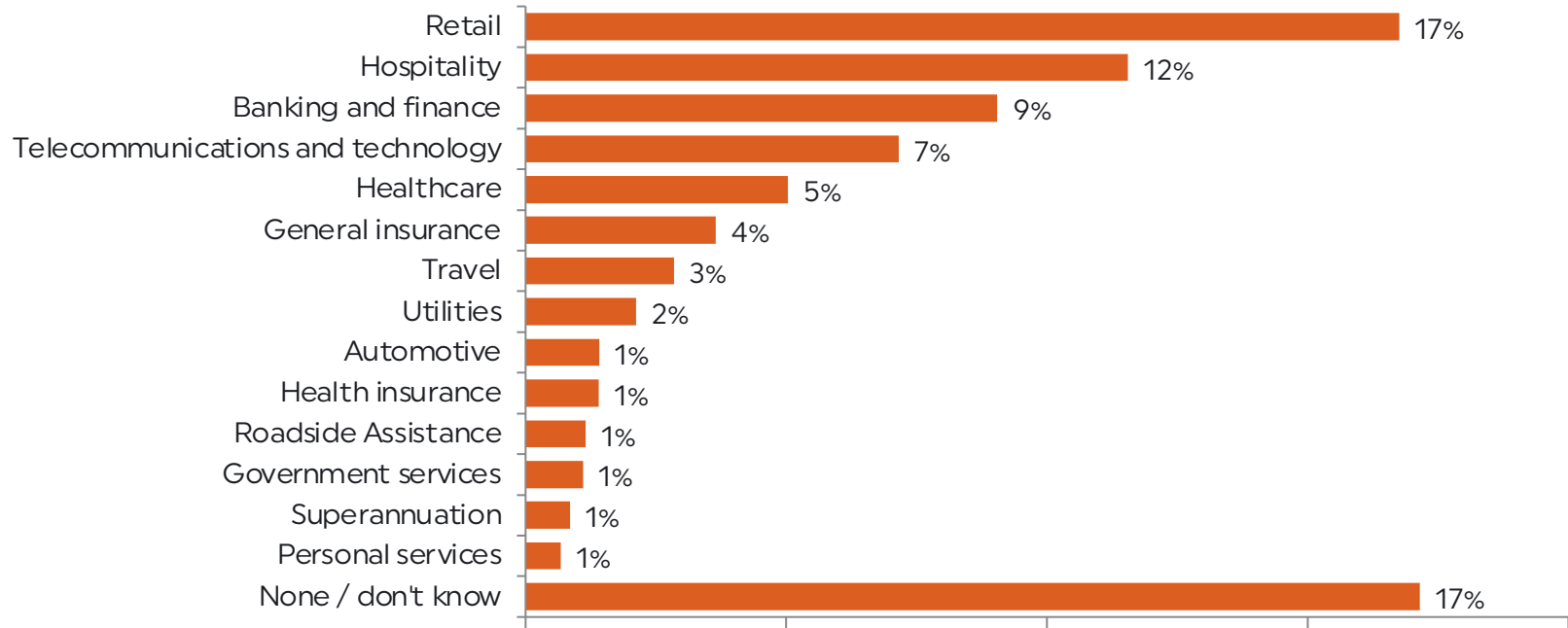
P13 - which of the following would help you, to predict if a company delivers great customer service?



Base: total sample
n=10,093, weighted

Which industry has the best customer service?

Q36 - Which industry do you think provides the best customer service? Please provide one industry only – the industry you think provides the best customer service.



NB: <1% not shown

Base: total sample
n=10,093, weighted

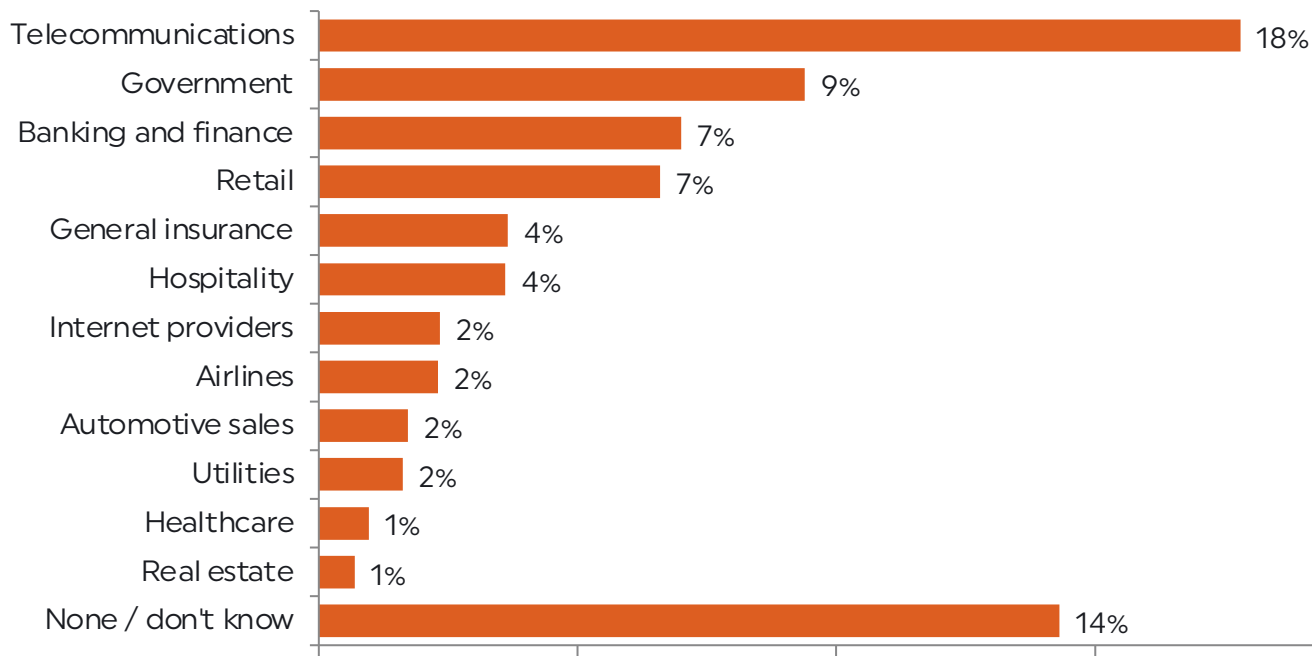


Retail and hospitality are seen to have the best customer service according to Australians.



Which industry has the worst customer service?

Q37 - Which industry do you think provides the worst customer service? Please provide one industry only – the industry you think provides the worst customer service.



NB: <1% not shown

Base: total sample
n=10,093, weighted

How do our thirteen categories perform?

Q8.1 - Overall, how satisfied are you with [BRAND]?

	Net Satisfied	Very Satisfied	Satisfied	Neither Satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
Car insurance	82%	38%	45%	12%	4%	2%
Automotive	82%	46%	35%	12%	4%	2%
Home insurance	82%	34%	48%	13%	4%	2%
Banking & finance	81%	36%	45%	12%	5%	2%
Superannuation funds	78%	35%	44%	15%	5%	2%
Health insurance	78%	30%	48%	15%	5%	2%
TV streaming	77%	29%	48%	15%	5%	3%
Airlines & cruise lines	74%	29%	45%	13%	8%	6%
Energy providers	73%	30%	43%	17%	7%	3%
Gambling	72%	28%	44%	21%	4%	4%
Mobile phone providers	71%	29%	42%	16%	9%	4%
Government services	66%	26%	40%	20%	8%	5%
Internet providers	66%	30%	36%	19%	10%	5%
Aged care	52%	22%	29%	33%	8%	7%
NDIS providers	51%	25%	26%	35%	10%	5%

Which brands are the top performers in our 13 categories?

Q8.1 – Q.8.15 - Overall, how satisfied are you with [BRAND]? X brand

Brand	Category	Net Satisfied	Very Satisfied	Satisfied	Neither Satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
Bendigo Bank	Banking	96%	61%	36%	4%	0%	0%
RAC	Home Insurance	96%	47%	49%	4%	0%	0%
ING	Banking	91%	58%	33%	4%	5%	0%
Carnival	Airlines & Cruise lines	90%	39%	52%	5%	0%	5%
Mazda	Automotive	89%	38%	51%	10%	1%	1%
Bank of Queensland	Banking	89%	56%	33%	5%	3%	3%
Woolworths Insurance	Car Insurance	89%	45%	44%	6%	4%	1%
ahm	Health Insurance	88%	32%	56%	5%	6%	2%
BMW	Automotive	87%	44%	43%	13%	0%	0%
Red Energy	Energy Providers	87%	42%	45%	11%	0%	2%
Apia	Car Insurance	87%	50%	37%	8%	5%	0%
Suncorp	Home Insurance	86%	30%	56%	11%	1%	1%
RACQ	Home Insurance	86%	42%	44%	12%	2%	0%
Stan	Streaming services	86%	37%	50%	9%	3%	1%
Disney	Streaming services	86%	36%	49%	9%	4%	1%
HESTA Super Fund	Superannuation	86%	46%	40%	9%	4%	1%
Commonwealth Superannuation	Superannuation	86%	34%	52%	5%	7%	2%
RACV	Car insurance	86%	41%	45%	8%	7%	0%
Toyota	Automotive	85%	38%	48%	11%	3%	1%
Audi	Automotive	85%	38%	47%	5%	10%	0%
Aldi	Mobile phone provider	85%	44%	41%	9%	4%	1%
Qsuper	Superannuation	85%	49%	36%	9%	6%	0%
MLC	Superannuation	85%	44%	40%	11%	2%	2%
RAC	Car insurance	85%	47%	38%	11%	3%	1%

Which brands are the worst performers in our 13 categories?

Q8.1 – Q.8.15 - Overall, how satisfied are you with [BRAND]? X brand

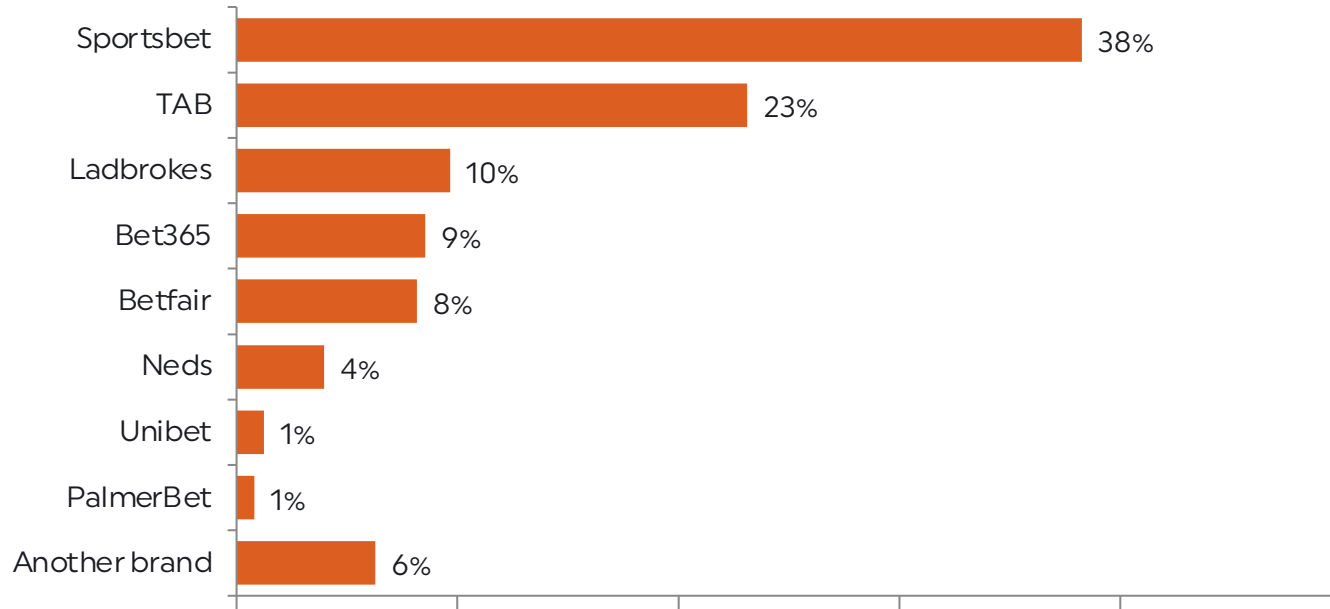
Brand	Category	Net Satisfied	Very Satisfied	Satisfied	Neither Satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
Volkswagen	Automotive	65%	26%	38%	21%	13%	2%
Simple Energy	Energy provider	65%	25%	40%	18%	14%	4%
TPG	Internet provider	65%	26%	39%	25%	8%	2%
Telstra	Mobile phone provider	64%	24%	40%	18%	12%	6%
Service SA	Government	63%	27%	36%	25%	6%	6%
Dodo	Internet provider	63%	26%	37%	20%	8%	10%
Disability Services Australia	NDIS provider	63%	25%	38%	26%	8%	4%
Optus	Internet provider	62%	27%	34%	21%	11%	6%
Ladbrokes	Gambling	60%	25%	34%	30%	6%	4%
Foxtel	Streaming services	59%	17%	42%	22%	12%	8%
Bupa	Aged Care	59%	23%	36%	27%	5%	8%
Telstra	Internet provider	57%	22%	35%	21%	15%	8%
ATO	Government	52%	10%	41%	32%	9%	8%
Australian Unity	NDIS provider	51%	23%	28%	34%	13%	2%
Centrelink	Government	49%	14%	35%	30%	13%	8%
Anglicare	Aged Care	44%	21%	23%	41%	12%	3%
Betfair	Gambling	28%	10%	18%	64%	4%	4%
Annecto	Aged Care	9%	7%	3%	83%	2%	6%
Minda	NDIS provider	6%	0%	6%	89%	3%	3%

GAMBLING



Which gambling brands have they engaged with in the last year?

Q2.5 - Which of the following brands did you most recently have contact with?

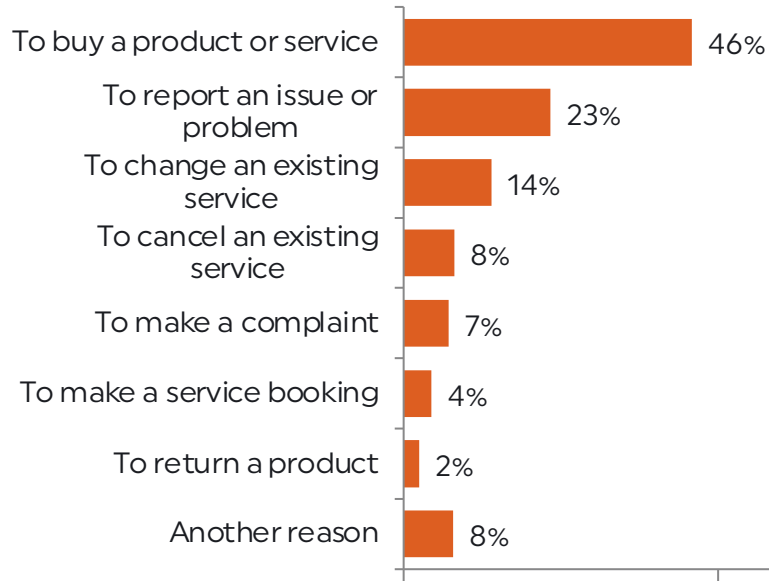


Base: gambling sample
n=1,130, weighted

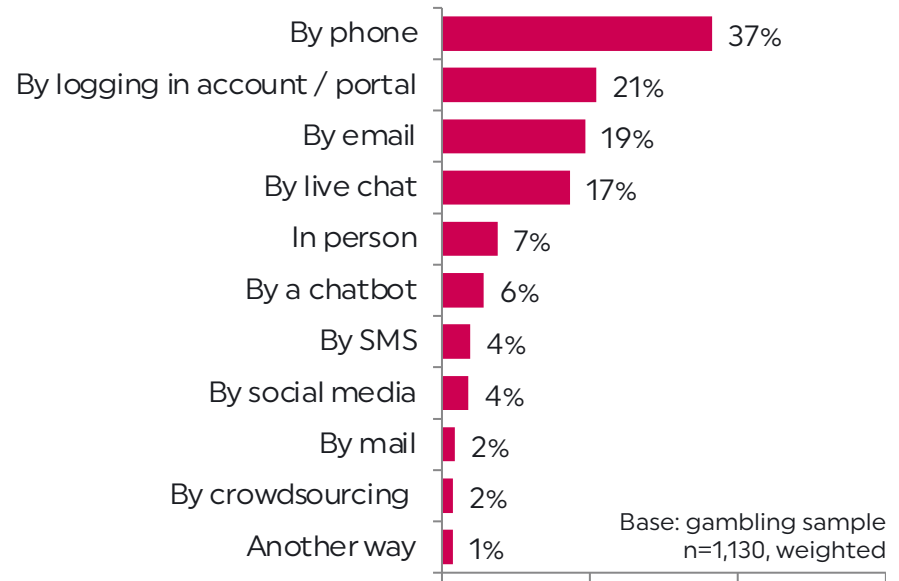
Why and how did they communicate with the brand?

Q3.5 - Why did you contact [BRAND]? Q4.5 - How were you in contact with [BRAND]?

Why did they communicate with the brand?

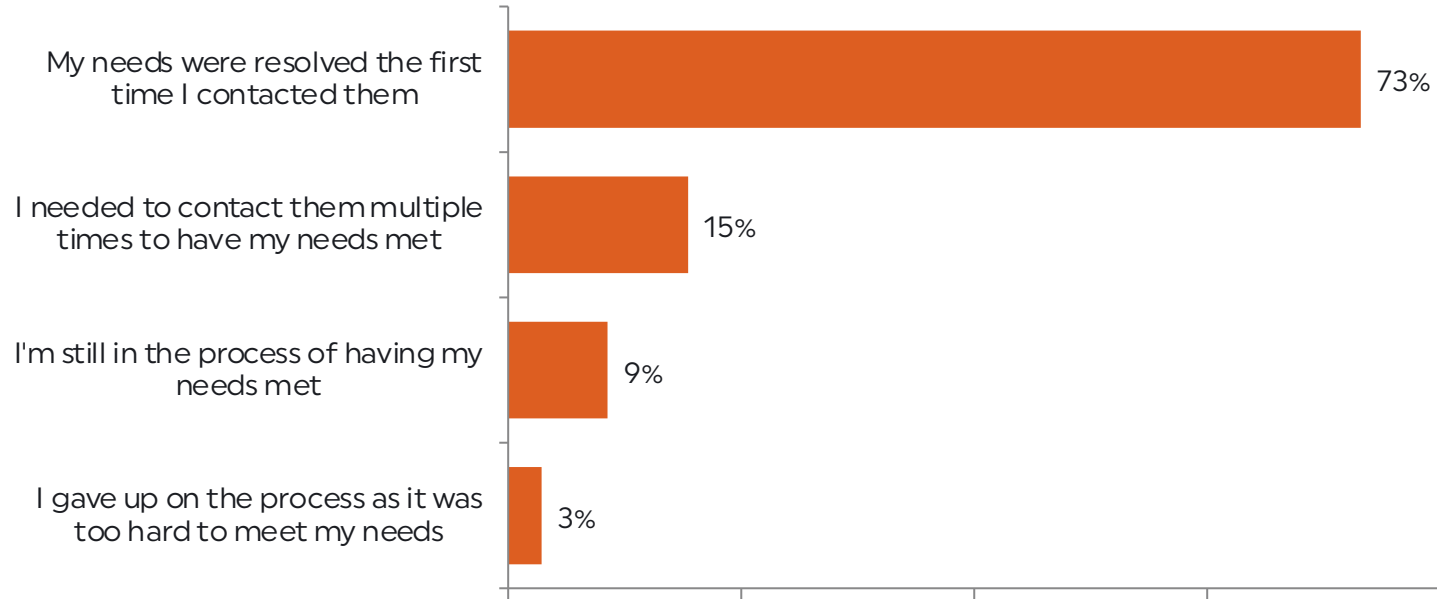


How did they communicate with the brand?



Three-quarters of customers had their needs resolved on first contact

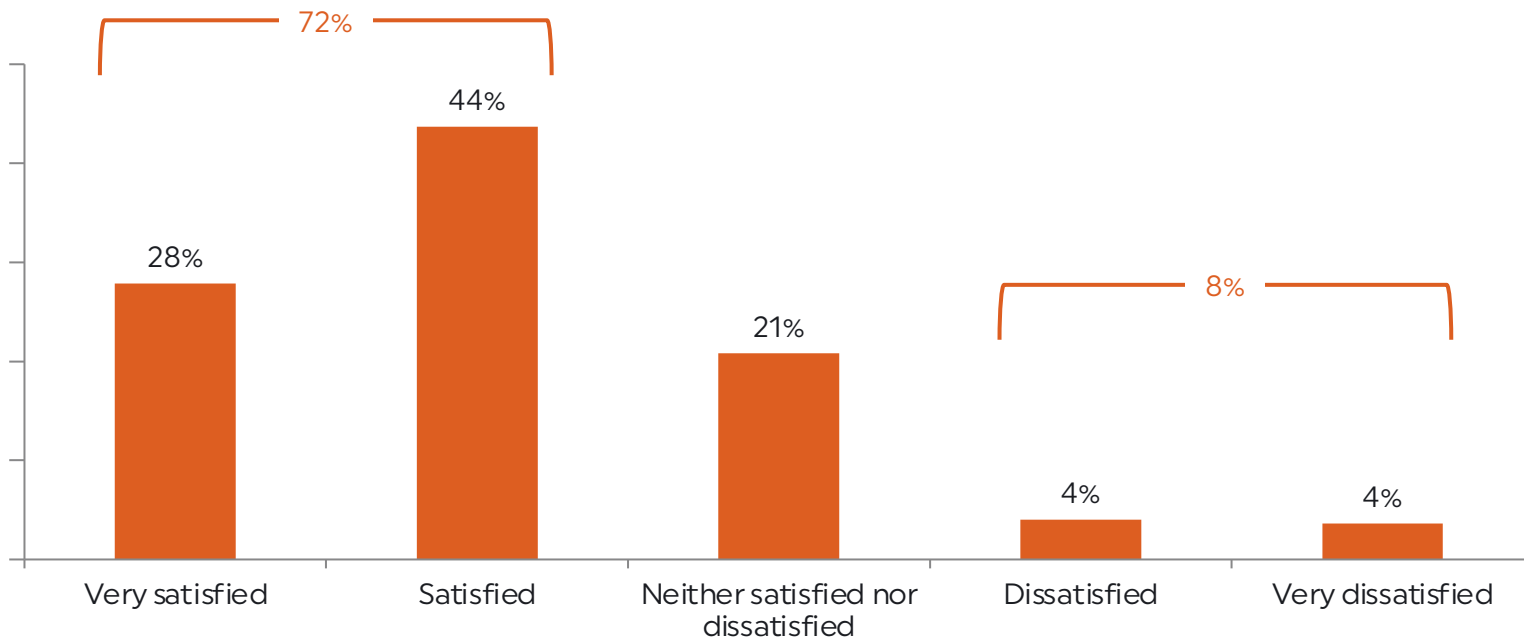
Q5.5 - Which statement best describes how your contact was handled?



Base: gambling sample
n=1,130, weighted

Three-quarters of Australians were satisfied with their interaction

Q8.5 - Overall, how satisfied are you with [BRAND]?



Base: gambling sample
n=1,130, weighted

Which brands had the most satisfied customers?

Q8.5 - Overall, how satisfied are you with [BRAND]? X brand

	Net Satisfied	Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied
Neds	84%	39%	46%	10%	2%	4%
Sportsbet	81%	30%	51%	14%	3%	2%
TAB	78%	30%	48%	17%	2%	2%
Bet365	71%	25%	45%	18%	7%	5%
Ladbrokes	60%	25%	34%	30%	6%	4%
Betfair	28%	10%	18%	64%	4%	4%
Another brand	67%	33%	34%	19%	6%	8%

NB: Brands with <n=30 not shown

Base: gambling sample
n=1,130, weighted

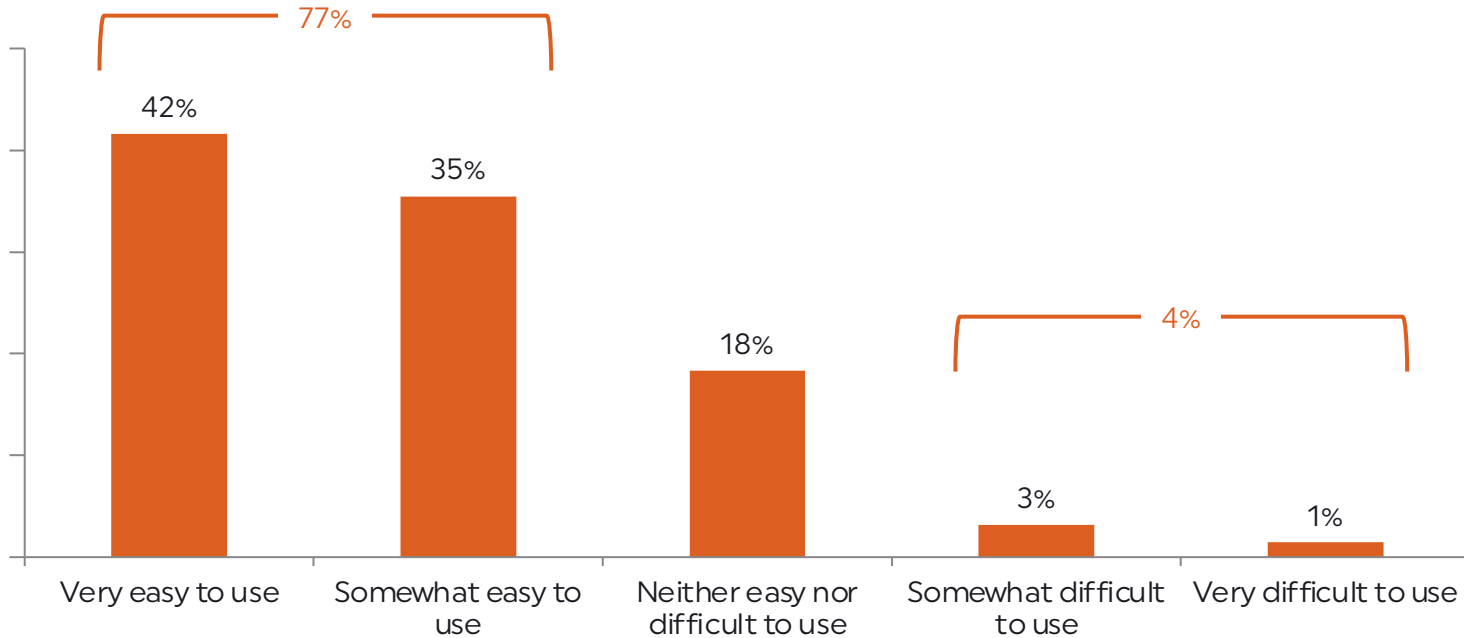


Neds and Sportsbet both top the list.



Around the same portion thought that the interaction was easy

Q9.5 - Overall, how easy to use would you say [BRAND] is?



Base: gambling sample
n=1,130, weighted

Which brands are the easiest to interact with?

Q9.5 - Overall, how easy to use would you say [BRAND] is? X brand

	Net easy to use	Very easy to use	Somewhat easy to use	Neither easy nor difficult to use	Somewhat difficult to use	Very difficult to use
Sportsbet	86%	51%	35%	11%	2%	1%
TAB	86%	45%	41%	12%	2%	0%
Neds	81%	44%	36%	13%	4%	2%
NET	77%	42%	35%	18%	3%	1%
Bet365	72%	36%	36%	21%	4%	3%
Ladbrokes	69%	30%	39%	24%	7%	1%
Betfair	34%	12%	22%	61%	2%	3%
Another brand	72%	44%	28%	20%	5%	2%

NB: Brands with <n=30 not shown

Base: gambling sample
n=1,130, weighted

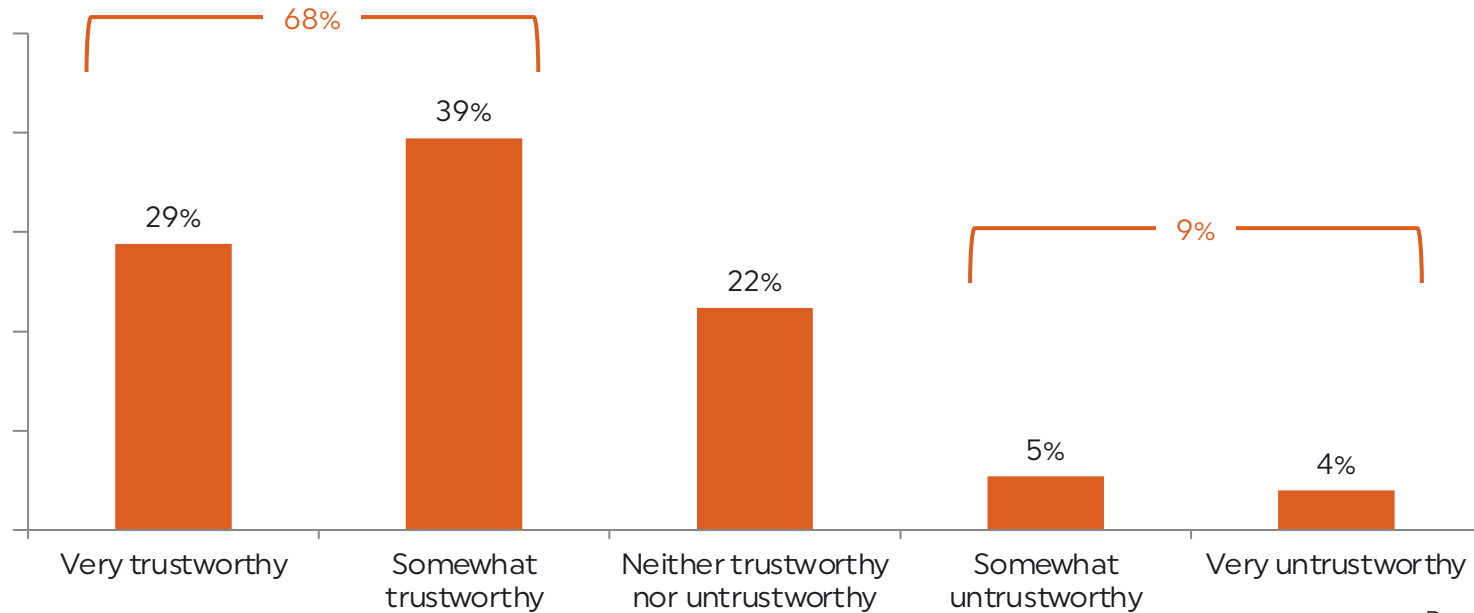


Sportsbet and TAB equally seen as the most easy to deal with.



While they're easy to deal with, gambling brands are far less likely to be seen as trustworthy

Q10.5 - Overall, how trustworthy would you say [BRAND] is?



Base: gambling sample
n=1,130, weighted

Which brands are the most trustworthy?

Q10.5 - Overall, how trustworthy would you say [BRAND] is? X brand

	Net Trustworthy	Very trustworthy	Somewhat trustworthy	Neither trustworthy nor untrustworthy	Somewhat untrustworthy	Very untrustworthy
Neds	81%	41%	40%	11%	7%	2%
TAB	75%	34%	41%	20%	3%	2%
Sportsbet	74%	30%	44%	16%	5%	5%
Bet365	71%	27%	44%	20%	7%	1%
NET	68%	29%	39%	22%	5%	4%
Ladbrokes	57%	22%	36%	32%	5%	5%
Betfair	38%	12%	26%	56%	3%	3%
Another brand	60%	33%	26%	23%	11%	6%

NB: Brands with <n=30 not shown

Base: gambling sample
n=1,130, weighted

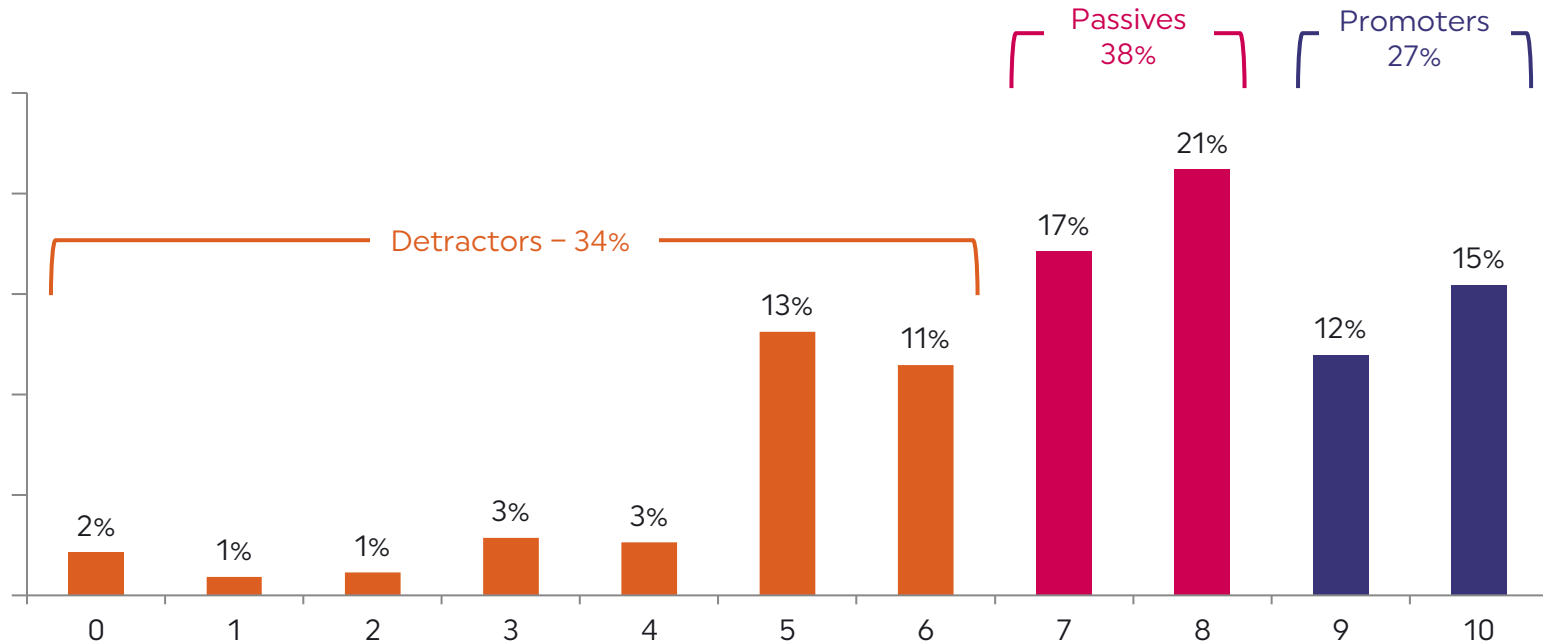


Neds and TAB seen as the most trustworthy of these.



How gambling brands perform on NPS

Q10A.5 - How likely are you to recommend [BRAND] to a family member, friend or colleague?



Base: gambling sample
n=1,130, weighted

Which brands have the highest NPS?

Q10A.5 - How likely are you to recommend [BRAND] to a family member, friend or colleague?

X brand

	NPS	Promoters	Passives	Detractors
TAB	5%	32%	40%	28%
Sportsbet	2%	30%	42%	28%
Neds	1%	26%	49%	25%
NET	-7%	27%	38%	34%
Bet365	-9%	30%	31%	39%
Ladbrokes	-20%	22%	36%	42%
Betfair	-54%	8%	30%	62%
Another brand	-10%	30%	30%	40%

NB: Brands with <n=30 not shown

Base: gambling sample
n=1,130, weighted

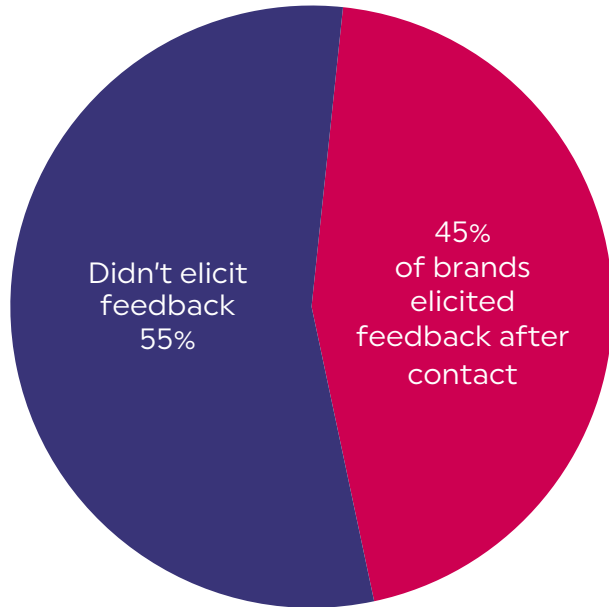


TAB and Sportsbet have the highest NPS of these...
Betfair with a massive -54% NPS.

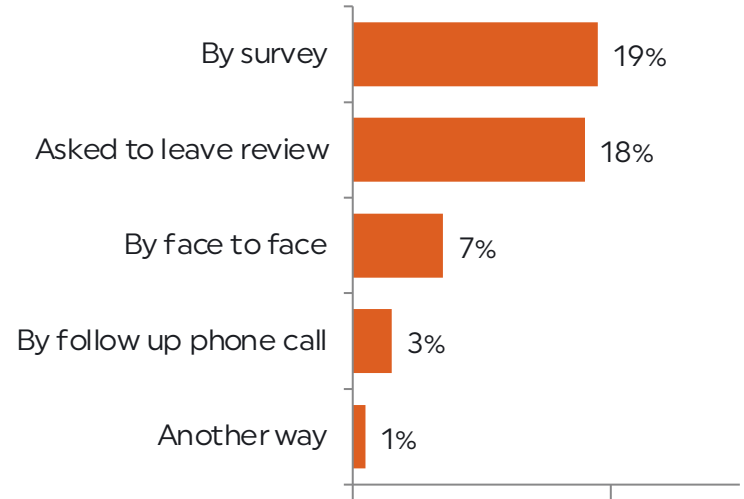


More than a third of gambling brands elicit feedback after contact

Q7.5 - Did [BRAND] solicit any feedback regarding your contact?



How did they seek feedback?



Base: gambling sample
n=1,130, weighted

How could the service experience be improved?

Q11.5 - What could [BRAND] have done to improve its service delivery to you?

- Better reward my loyalty 44%
- Provide more contact options (Live chat, Chatbots) 21%
- Be more proactive with me 16%
- Provide its staff with customer service training 15%
- Answered my query 12%
- Been more responsive... answered the phone / email / chat faster 9%
- Solicit my feedback 7%
- Provide online access to my account / customer portal 7%
- Provide a customer community for seeking help 6%
- Something else 10%

Base: gambling sample
n=1,130, weighted



For almost half of customers, the best way to build a better experience is rewarding loyalty.



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