**PCA**

**Quality Metrics Survey**

**Project Number 272.201.30397**

**Separate data files for GB and NI. SURVEY PROL**

**Provided on sample:**

**Bank**

**GB**

Barclays GB

Bank of Scotland

Clydesdale Bank

Co-Operative Bank

Coventry Building Society

First Direct

Halifax GB

HSBC GB

Lloyds Bank

Metrobank

Nationwide GB

Natwest

Royal Bank of Scotland

Santander GB

TSB

Yorkshire Bank

**NI**

Bank of Ireland

Barclays NI

Danske Bank

First Trust Bank

Halifax NI

HSBC NI

Nationwide NI

Santander NI

Ulster Bank

**Age**

Customer Age bands (<25, 25-34, 35-44, 45-54, 55-64, 65+).

**Survey ID**

Applied by GfK (NOT customer number).

**Weight**

**Wave**

The disaggregated data should also include the **half year** in which the interviews were conducted, such that when the data is updated every half year, those who already hold the data set have the option of keeping or removing “older” respondents” but will know which sets of published recommendation scores they have contributed to. Format: H1 20XX?

**No personal identifiable information will be shared (name, phone number etc).**

**II. INTRODUCTION**

**Not included**

NOTE: Where text appears inside {} – eg {bank} – this indicates that the relevant text will be included, based on the sample, by the CATI script.

Good morning / afternoon / evening. Please could I speak to {NAMED CONTACT?}

IF SOMEONE ELSE ANSWERS AND ASKS WHY WE WANT TO TALK TO NAMED CONTACT, SAY:

I am calling because we are conducting a survey of customers of all of the major banks and building societies in the UK.

My name is ……. from GDCC, an independent market research company. We have been commissioned by GfK to conduct a survey on behalf of {bank} as part of a survey of customers of all the main banks and building societies, and I have been given your contact details by {bank}. The survey is about what people think about their {bank/building society}.

All the scores from customers of each bank and building society will be added together and used to make an overall rating for each service area. These combined scores will then be displayed in branches and on websites so that customers can see how their bank or building society ranks against others.

**MUST BE READ OUT FOR GDPR COMPLIANCE**

Your personal information will always be handled confidentially; we will not make your personal information available to anyone without your knowledge and consent, no sales call will result from this interview, it will be used solely for the purposes of the research and quality control. For further information about your legal rights and how to exercise these please visit our website www.gfk.com/TBC.

This work is being conducted in accordance with the Market Research Society Code of Conduct.

The interview will only take 5 minutes to complete. Would you be willing to help?

1. Yes [PROCEED]
2. Yes, but not now [MAKE APPOINTMENT]
3. No [THANK AND CLOSE]
4. Opt out of market research

**IF WORRIED ABOUT CONFIDENTIALITY**

- Your survey responses will be treated in the strictest confidence.

- All your data is anonymous, and will not be linked with your contact details in any way that can identify you.

**RECORDING**

This call may be recorded for training and quality purposes.

1. Continue

2. Respondent objects to being recorded

**IF OBJECTS TO RECORDING**

In that case I can assure you that the call will not be recorded.

**III. SCREENER**

**Not included**

Base: All respondents

S01 [S]

Can I just check – do you have a personal {current account/payment account}, either sole or joint, with {bank}?

INTERVIEWER NOTE – DO NOT INCLUDE ANY BUSINESS ACCOUNTS.

1. Yes ASK Q1

2. No THANK AND CLOSE

I**V. MAIN QUESTIONNAIRE**

Base: All Respondents

**To be included.**

2 versions to be included; ‘All’ which includes All responses and ‘Recommend’ which only includes responses eligible for the official metric. Guidelines will be issued to explain that the ‘Recommend’ version should only be used for calculations.

In ‘All’ version, codes 5 to 6 will be labelled as:

NOT USED IN RANKING Don’t know

NOT USED IN RANKING Do not recommend

Q1 [S]

Thinking about your {current account/payment account}, taking everything into account, are you likely or unlikely to recommend {bank} to friends and family for current account banking, if asked by them?

Are you extremely likely, very likely, fairly likely or unlikely?

1. Extremely likely

2. Very likely

3. Fairly likely

4. Unlikely

5. Don’t know (DO NOT READ OUT)

6. Do not recommend (DO NOT READ OUT)

Base: All Respondents except First Direct (GB)

**To be included.**

2 versions to be included; ‘All’ which includes All responses and ‘Recommend’ which only includes responses eligible for the official metric. Guidelines will be issued to explain that the ‘Recommend’ version should only be used for calculations.

In ‘All’ version, codes 5 to 7 will be labelled as:

NOT USED IN RANKING Don’t know

NOT USED IN RANKING Have not used a branch in the last 3 months

NOT USED IN RANKING Do not recommend

Q2 [S]

I’d like to ask next about the branch services that {bank} offers – by that I mean the staff and facilities including any machines inside the branch. If you have used a Post Office to carry out banking activities on your {bank} account please include this. Based on your experience over the last **three months** are you likely or unlikely to recommend {bank}’s branch services to friends and family, if asked by them?

Are you extremely likely, very likely, fairly likely or unlikely?

If you have not used a branch in the last **three months** please say so.

1. Extremely likely

2. Very likely

3. Fairly likely

4. Unlikely

5. Don’t know (DO NOT READ OUT)

6. Have not used a branch in the last 3 months.

7. Do not recommend (DO NOT READ OUT)

Base: All Respondents

**To be included.**

2 versions to be included; ‘All’ which includes All responses and ‘Recommend’ which only includes responses eligible for the official metric. Guidelines will be issued to explain that the ‘Recommend’ version should only be used for calculations.

In ‘All’ version, codes 5 to 7 will be labelled as:

NOT USED IN RANKING Don’t know

NOT USED IN RANKING Have not used online or mobile banking in the last 3 months

NOT USED IN RANKING Do not recommend

Q3 [S]

And again based on your experience over the last **three months** are you likely or unlikely to recommend {bank}’s online and mobile banking services to friends and family, if asked by them?

Are you extremely likely, very likely, fairly likely or unlikely?

If you have not used online or mobile banking in the last **three months** please say so.

1. Extremely likely

2. Very likely

3. Fairly likely

4. Unlikely

5. Don’t know (DO NOT READ OUT)

6. Have not used online or mobile banking in the last 3 months.

7. Do not recommend (DO NOT READ OUT)

Base: All Respondents AGED 18+

**To be included.**

2 versions to be included; ‘All’ which includes All responses and ‘Recommend’ which only includes responses eligible for the official metric. Guidelines will be issued to explain that the ‘Recommend’ version should only be used for calculations.

In ‘All’ version, codes 5 to 7 will be labelled as:

NOT USED IN RANKING Don’t know

NOT USED IN RANKING Have not been overdrawn in the last 12 months

NOT USED IN RANKING Do not recommend

Q4 [S]

Based on your experience over the last **twelve months** are you likely or unlikely to recommend {bank}’s overdraft services to friends and family, if asked by them?

Are you extremely likely, very likely, fairly likely or unlikely?

If you have not been overdrawn on your account in the last **twelve months** please say so.

1. Extremely likely

2. Very likely

3. Fairly likely

4. Unlikely

5. Don’t know (DO NOT READ OUT)

6. Have not been overdrawn in the last 12 months

7. Do not recommend (DO NOT READ OUT)

**V. DRIVERS**

**Not included.**

**VI. DEMOGRAPHICS**

**Not Included**

**END OF QUESTIONNAIRE**