



## At your service...?

**Market analysis:**  
Is business meeting European consumer expectations for appointment and delivery times?

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## Market research:

### **Service and product delivery**

The following market analysis has been conducted by global research consultancy TNS to establish current consumer perceptions of customer service standards among businesses that deliver products and services to consumers' homes, including tradesmen, service management providers and delivery companies.

The study sought to confirm what timeslots consumers are given when receiving home visits, how often companies arrive late and general levels of consumer tolerance.

Interestingly, the research revealed that 87 per cent of consumers across Great Britain, France, Germany and the Netherlands have suffered tradesmen and delivery firms turning up late for appointments, with more than a quarter claiming to have experienced poor punctuality on a regular basis.

The results provide an interesting insight into the importance of punctuality and good communication from a consumer perspective.

Good customer service will differentiate a company from the competition in any economic climate, in a recession it can mean business survival.

### Research methodology

Global research consultancy TNS was commissioned to conduct research among a panel of 1,000 consumers, aged 16-64, in each of the following countries: Great Britain, Netherlands, Germany and France. The interview samples were weighted to represent the adult populations of each country.

A qualifying question was asked to ensure respondents had received a product delivery or job visit within the past 12 months before the full research was conducted. Following this question, the number of respondents were as follows: 829 (Great Britain); 772 (France); 673 (Germany); 890 (Netherlands).

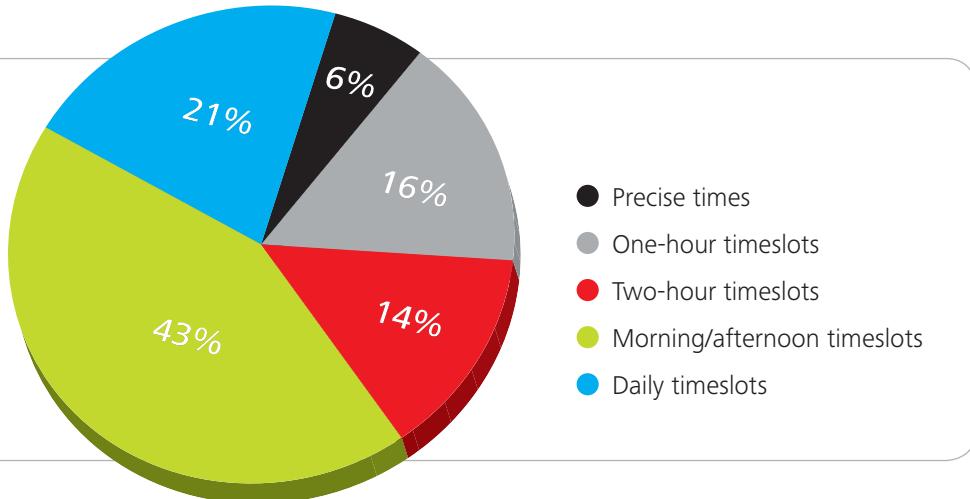


## In general, when you receive a product delivery or a job visit from service companies/tradesmen, what times/timeslots do they provide?

### Combined results

Nearly half (43%) of respondents across Europe have to handle the inconvenience of waiting in for an appointment for up to four hours, where companies are only able to offer a morning or afternoon timeslot.

Surprisingly, more than a fifth of companies (21%) expect people to potentially take a whole day off work, with a massive eight-hour timeslot specified. A tiny 6% of our survey audience said they could expect a precise arrival time to be specified.

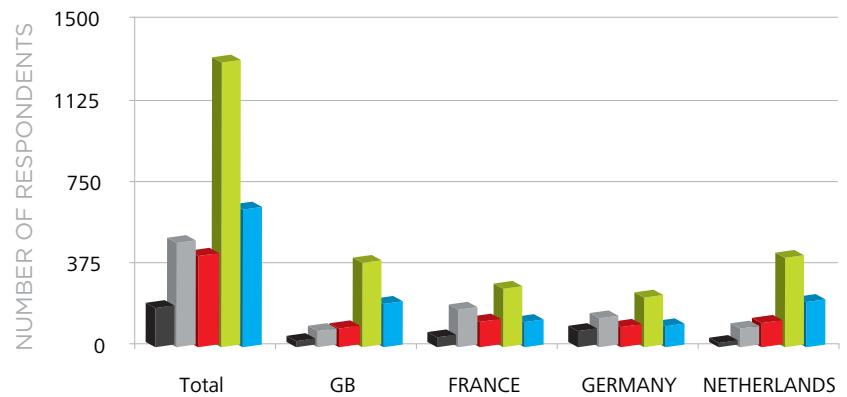


### Country-specific results

Germany leads the way in precision timeslots with 12% of German consumers enjoying the convenience of an exact time specified for a delivery. Eight-hour timeslots are also least prevalent with German and French companies, at only 16%.

Great Britain appears to offer the poorest customer service, with three-quarters (75%) of British consumers given only morning/afternoon or daily timeslots.

France offers the most one-hour timeslots – 24% compared to Britain at 10%.



**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

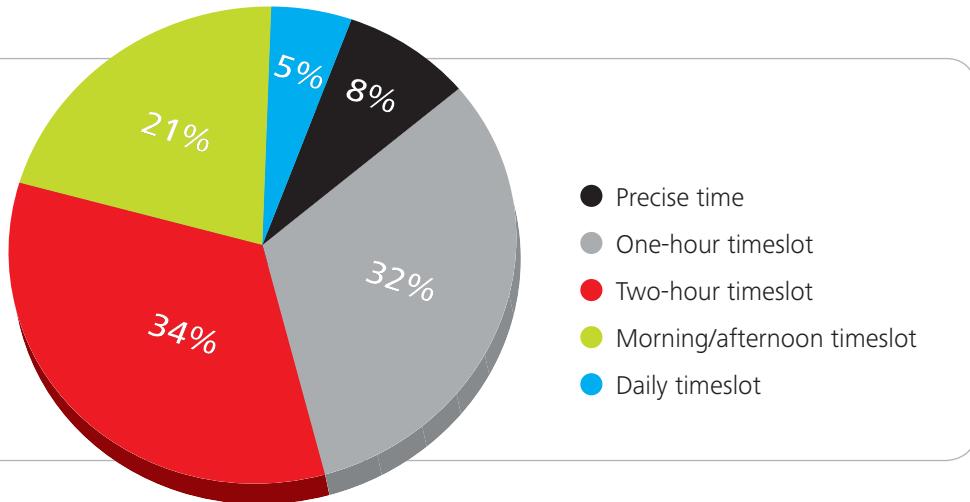
# Q2

## In regards to an acceptable timeslot window for deliveries/job visits, what would be the maximum timeslot that you would find acceptable?

### Combined results

While only 5% of European consumers think an eight-hour timeslot is acceptable, perhaps more surprising is the fact only 8% expect a precise time.

While the majority of respondents (34%) cited two hours as the maximum timeslot they would find acceptable, nearly as many (32%) claimed that one hour would be the longest they would be prepared to wait.

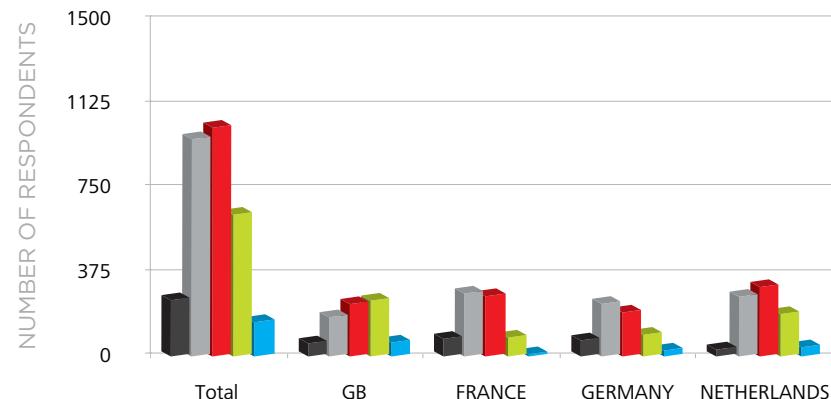


### Country-specific results

The Dutch appear to have the most relaxed attitudes to delivery times – only 4% think a precise timeslot is the only acceptable option, compared to Germany at 12%.

For German consumers, one hour is the longest acceptable timeslot for most respondents (37%). France has the highest overall expectations, with only 2% agreeing that an eight-hour timeslot was acceptable and the majority (38%) claiming one hour as the upper limit.

Great Britain bucked the trend with 32% claiming they would find a four-hour wait acceptable, perhaps reflecting Britain's current tendency to only offer customers a morning or afternoon slot. Nearly the same number (30%) would prefer a two-hour slot, however.



**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

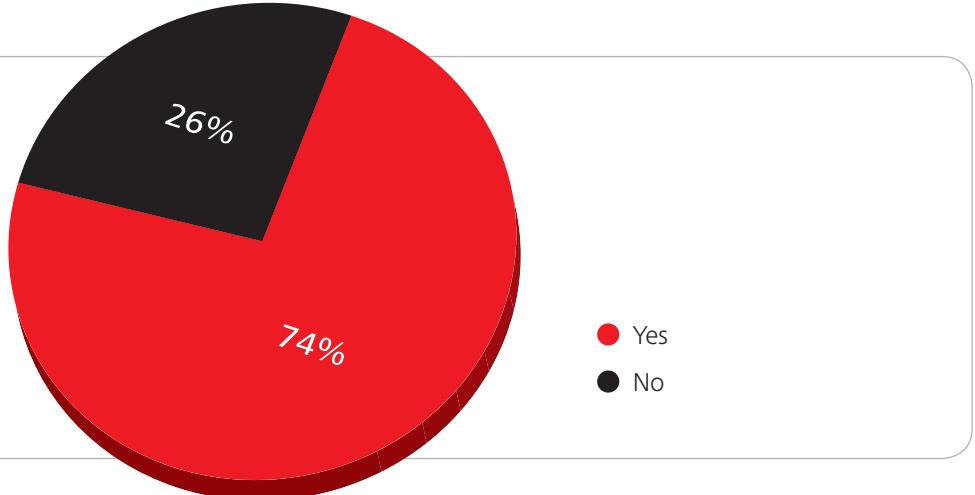
# Q3

## Would you be less likely to use a company/tradesmen again if they failed to offer specific times or acceptable timeslots for deliveries or job attendance?

### Combined results

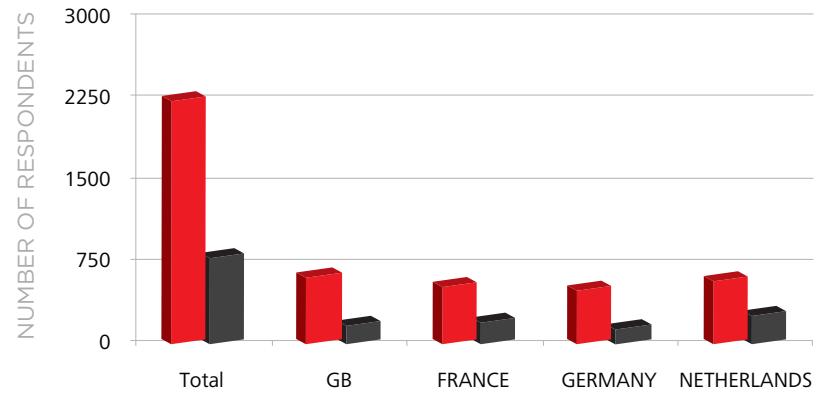
The research proved conclusively that timeslots matter to customers.

A definitive 74% of our survey audience stated they would be less likely to use a company or tradesman again if they failed to offer specific times or acceptable timeslots for deliveries or job attendance.



### Country-specific results

The trend was mirrored across Europe with British respondents most influenced (78%) and Dutch consumers least (69%).



**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

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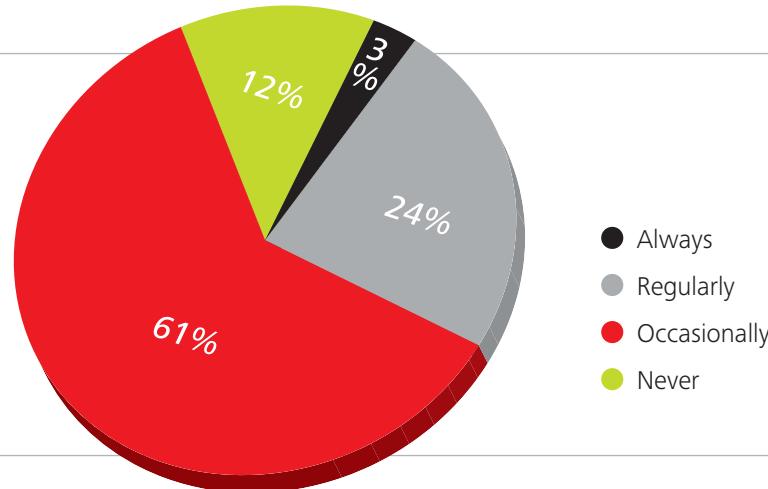
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# Q4

## When a specific time or timeslot has been agreed, how often would you say deliveries are late or service companies/tradesmen are late for job appointments?

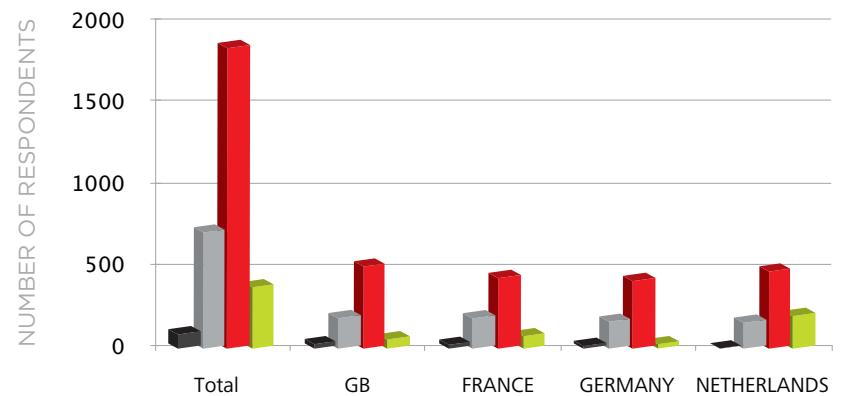
### Combined results

Nearly one in four (24%) respondents in our survey claimed that products are regularly delivered late and that service companies or tradesmen are also regularly late for appointments.



### Country-specific results

88% of our total survey audience reported problems with unreliability - this figure climbed to 94% in Germany and to 92% in Great Britain.



**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

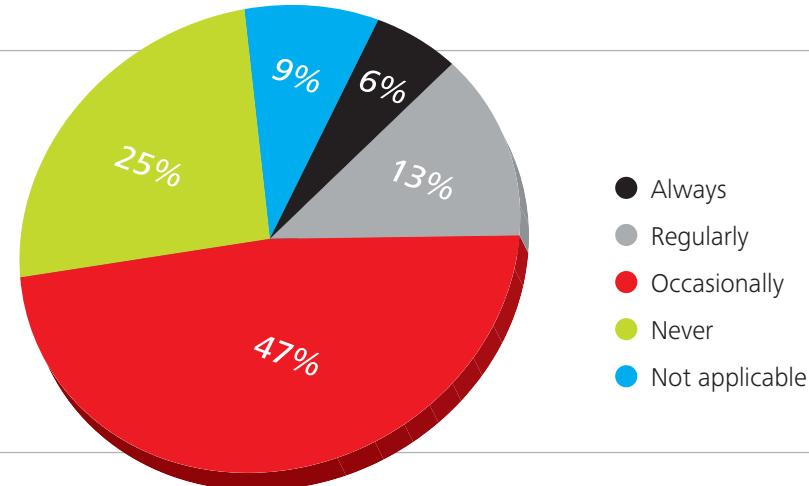
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# Q5

## When a home delivery or service company/tradesman is delayed, are you informed of the delay?

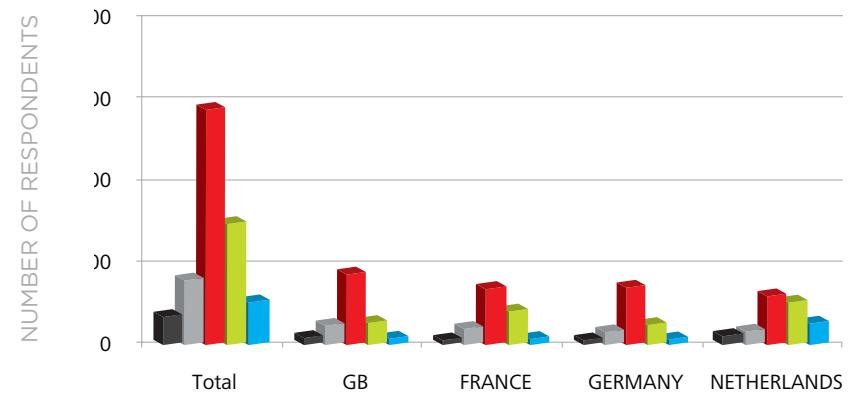
### Combined results

A quarter (25%) of all respondents are never informed about any delays with a home delivery or service/tradesman appointment - and only 6% always receive an update.



### Country-specific results

Dutch consumers are let down most by companies, with 31% of our audience in the Netherlands reporting that they never get an update on any delays.



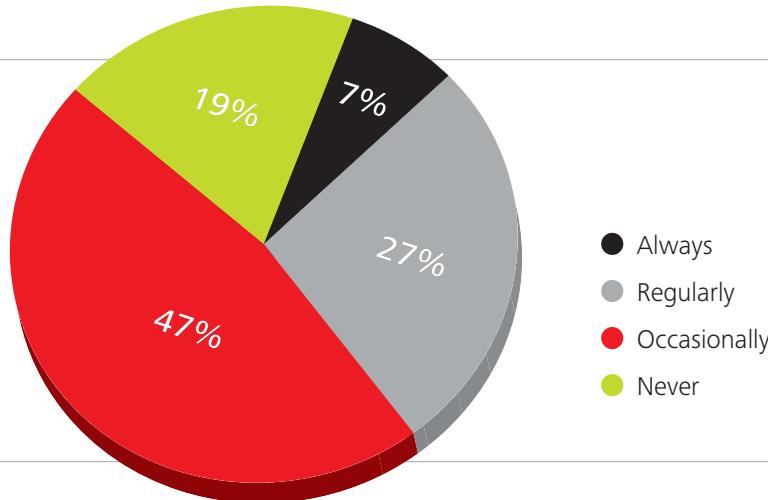
**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

# Q6

## How often are you informed of more specific attendance/delivery times in the 24 hours before the delivery/appointment?

### Combined results

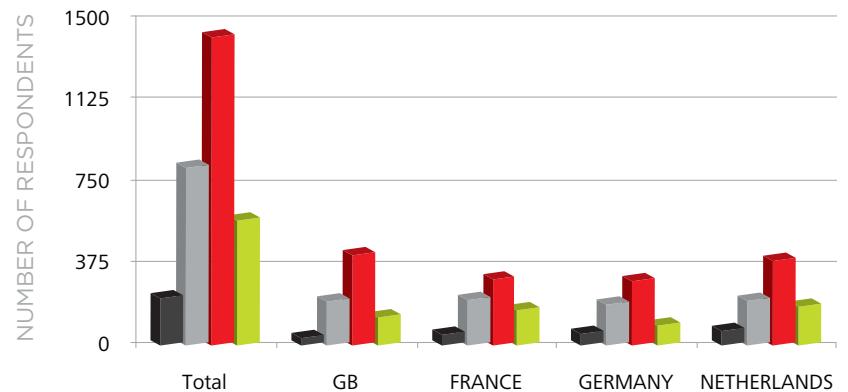
19% of European consumers never receive a more specific attendance/delivery time in the 24 hours before the delivery or appointment.



### Country-specific results

This state of affairs is mirrored across Europe with the exception of Germany, where the picture is slightly better; 9% of customers always get told a more specific time and only 15% never get told.

French consumers have the worst problem with 22% never getting an update and only 7% always being told.



**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

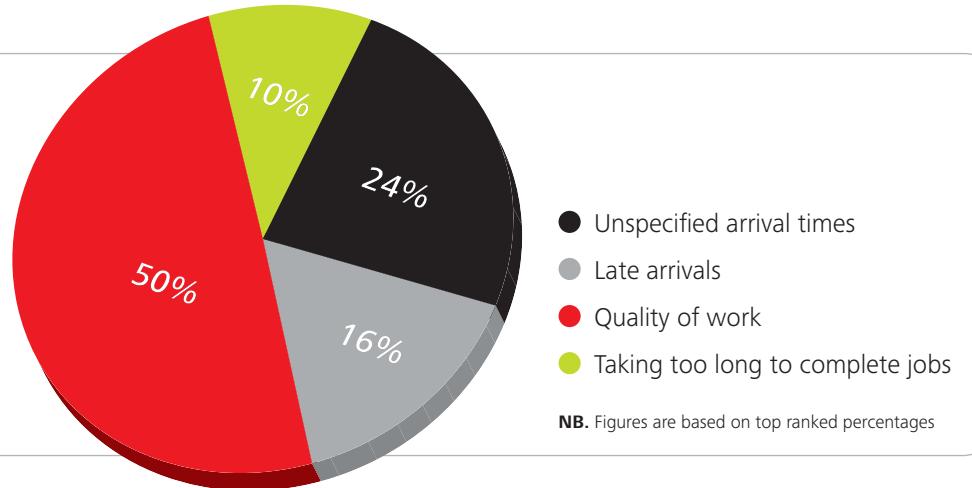
Q7

## If you consider there to be failings of service companies/tradesmen and/or companies making home deliveries, which of the following would be your biggest concern?

### Combined results

When we asked our survey audience what their biggest concerns were about the standards of customer service they received from tradesmen, service companies or companies making home deliveries, quality of work came out on top with 50% of respondents ranking this as their number one concern.

Unspecified arrival times (24%), however, were seen as significantly more troublesome than late arrivals (16%) or taking too long to complete jobs (10%).



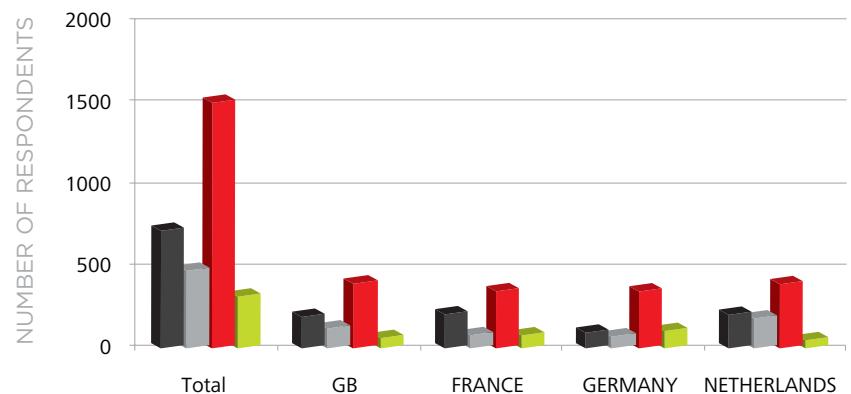
### Country-specific results

French consumers had the biggest problem with unspecified arrival times - 29% saw them as a problem, versus 16% of respondents in Germany.

Across Europe, Dutch people find late arrivals most irritating, with 22% of survey participants ranking them as their biggest concern, compared to only 12% in France and Germany.

Quality of work was seen as the key issue for Germans, with 55% citing this as their main concern, versus 47% of Dutch respondents.

Germans have the least patience with tradesmen taking too long to complete jobs – 17% citing the latter as their main concern, more than double the figure in the Netherlands (7%).



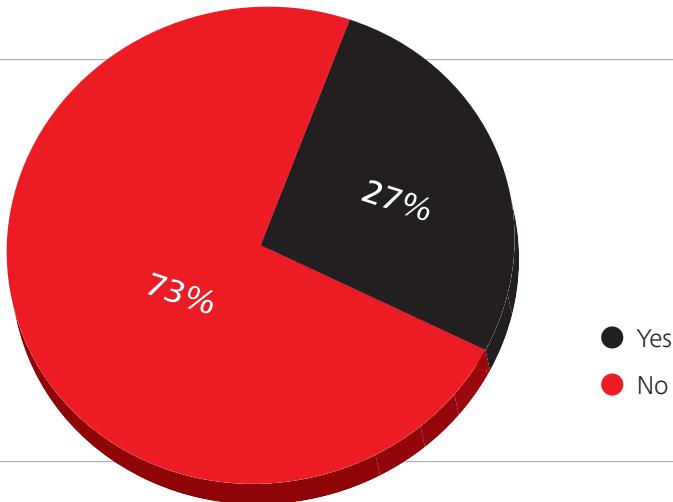
**Base:** All respondents that have received a product delivery or arranged job visits in past 12 months.

# Q8

## Do you believe punctual deliveries and job attendance times have deteriorated since the global economic downturn?

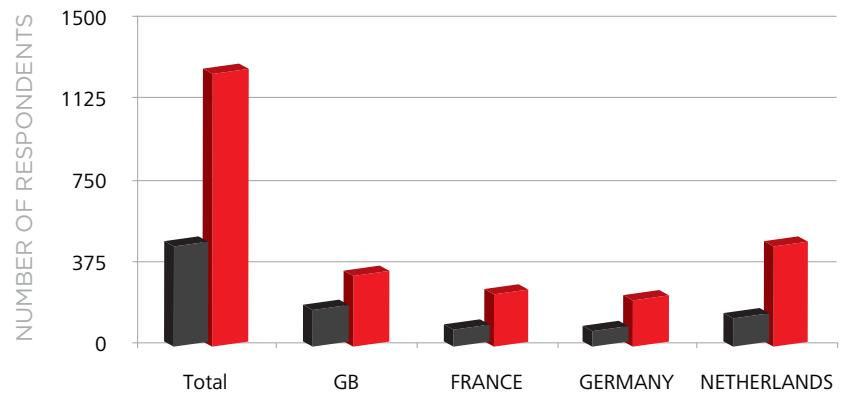
### Combined results

More than a quarter (27%) of respondents thought that punctual deliveries and job attendance times had deteriorated since the global economic downturn.



### Country-specific results

This figure peaked in Britain where more than a third (34%) of consumers think they have seen a drop in standards.



**Base:** All respondents that have received at least 3 product deliveries or arranged job visits in past 12 months.

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## Research summary

This study was undertaken to determine consumer perceptions of the service standards provided by companies operating mobile workforces, delivering products and services to consumers' homes.

The research results have clearly revealed that, in general, these companies are failing to meet expected service standards.

While consumer perceptions vary from country to country across the range of subject fields investigated, they do so within the confines of relatively narrow statistical scales.

The overall consumer experiences identified (88% suffering from firms turning up late for appointments; 27% on a regular basis; 64% being given four-hour morning or afternoon timeslots at best; and only 19% being regularly informed of delays) make a compelling business case for firms that visit multiple customer sites on a daily basis to strengthen their service offering.

Perceived deficiencies in current service standards become all the more significant when analysed alongside prevailing levels of tolerance among consumers. A sizeable 74% believe morning or afternoon timeslots are unacceptable; 24% also believe unspecified appointment times are the biggest failing of service and delivery companies.

Unless companies implement operational changes, a significant improvement in service standards will not be attained.

Although companies' requirements for fleet management technology differ, this research has furthered our understanding of the business potential for time-accurate planning tools.

Fleet management technology has proven successful in addressing a wealth of business issues, from cutting fuel and administrative costs to boosting productivity. Less well publicized, yet of equal importance, is the role it can play as an accurate travel time-based planning aid to improve standards of customer service. Details of this can be found in TomTom's service delivery white paper: The optimum route to happy customers.



With such technology at the disposal of companies, mobile workers are less likely to face unrealistic job timetables, to be frustrated by traffic delays and to disappoint customers in the way this research suggests they are currently doing.

A business's reputation is everything. As the old saying goes, 'glass, china, and reputation are easily cracked, but they are never well mended'.

**Thomas Schmidt**, Managing Director, TomTom Telematics.

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