

Which? – Bank Employees Survey

METHODOLOGY NOTE

ComRes interviewed 383 customer-facing bank employees between 6th May and 21st July 2015. All respondents had daily interaction with customers and were no higher than middle level management. All respondents worked for one of the five main retail banking groups:

- HSBC
- RBS (including Royal Bank of Scotland and Natwest)
- Lloyds Banking Group (Including Lloyds Bank, Halifax and Bank of Scotland)
- Santander
- Barclays

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To commission a voting intention poll or a public opinion survey please contact Katharine Peacock: katharine.peacock@comres.co.uk

To register for Pollwatch, a monthly newsletter update on the polls, please email: pollwatch@comres.co.uk

Which? Bank Employee Survey

Q20_SUM. Thinking about the emphasis on customer service and selling in your job, please tell me whether you agree or disagree with each of the statements I am about to read. - SUMMARY TABLE

Base: All respondents

	Total	Agree	Disagree	Don't know	Prefer not to say
There is day to day emphasis from managers on providing good customer service	383 100%	337 88%	21 6%	13 3%	11 3%
There is more emphasis on the need to provide good customer service than on the need to sell	383 100%	298 78%	39 10%	35 9%	11 3%
When I first started my job, I didn't realise the extent to which I would be expected to sell	383 100%	143 37%	177 46%	51 13%	12 3%
There is day to day emphasis from managers on the need to meet sales targets	383 100%	88 23%	243 63%	40 10%	11 3%
There is day to day emphasis from managers on the need to sell	383 100%	76 20%	261 68%	33 9%	13 3%
There is now more pressure than ever to meet sales targets	383 100%	65 17%	274 72%	31 8%	13 3%
There is greater emphasis on the need to sell than on the need to provide good customer service	383 100%	38 10%	292 76%	41 11%	12 3%

Which? Bank Employee Survey

Q22_SUM. I am going to read out some sentences that some people use to express how they feel about selling. For each one please tell me whether it describes how you personally feel or not. - SUMMARY TABLE

Base: All respondents

	Total	Yes	No	Don't know	Prefer not to say
I feel that my customers fully understand the products they're buying	188 100%	149 79%	17 9%	12 6%	10 5%
I get the right amount of training to understand what products I'm selling	188 100%	136 72%	34 18%	8 4%	10 5%
I fully understand all of the financial products that I am required to sell	188 100%	135 72%	30 16%	11 6%	11 6%
I do not feel pressurised into selling by my manager	188 100%	121 64%	37 20%	17 9%	13 7%
I'm comfortable with the level of pressure there is to sell in my current role	188 100%	111 59%	49 26%	16 9%	12 6%
Selling is part of the job; you either accept it or leave	188 100%	101 54%	69 37%	8 4%	9 5%
I enjoy the challenge of selling	188 100%	71 38%	90 48%	16 8%	10 5%
I accept the need to sell products when it is appropriate, but sometimes I feel that I'm expected to sell regardless of whether it is appropriate or not	188 100%	52 28%	112 60%	11 6%	12 7%
I feel pressurised into selling by the culture in the bank	188 100%	48 26%	114 61%	13 7%	12 6%

Which? Bank Employee Survey

Q22_SUM. I am going to read out some sentences that some people use to express how they feel about selling. For each one please tell me whether it describes how you personally feel or not. - SUMMARY TABLE

Base: All respondents

	Total	Yes	No	Don't know	Prefer not to say
I feel unhappy in my current job because of the level of pressure to sell	188 100%	42 22%	126 67%	8 4%	12 6%
I feel pressurised into selling by my manager	188 100%	36 19%	124 66%	15 8%	13 7%
I have to focus on sales over service	188 100%	29 16%	136 72%	11 6%	12 6%

Which? Bank Employee Survey

Q28_SUM. Thinking about the types of sales and referrals you make, please tell me to what extent you agree or disagree with each of the statements I am about to read. - SUMMARY TABLE

Base: Those for whom sales is a part of their job

	Total	Agree	Disagree	Don't know	Prefer not to say
Employees are told to only do 'needs-based' selling, where financial products are only sold if they are appropriate for the needs of the customer	188 100%	148 79%	24 13%	7 4%	8 5%
I approve of my bank's approach to sales	188 100%	137 73%	29 16%	11 6%	11 6%
There is a strong emphasis on only doing needs-based selling	188 100%	129 69%	40 21%	11 6%	8 4%
I feel confident that if someone reported there was an undue pressure to sell, management would investigate this in an unbiased way	188 100%	127 67%	36 19%	18 10%	6 3%
I would feel comfortable going to management if I felt I was under undue pressure on the need to sell	188 100%	108 57%	63 34%	9 5%	7 4%
Although we are told only to do 'needs-based' selling, this is not enforced	148 100%	63 42%	75 51%	9 6%	1 1%
The sales targets drive employees to sell even when it is not appropriate	188 100%	60 32%	114 61%	8 4%	6 3%
I know that some of my colleagues have mis-sold products in order to meet their sales targets	188 100%	59 32%	105 56%	17 9%	6 3%

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Q28_SUM. Thinking about the types of sales and referrals you make, please tell me to what extent you agree or disagree with each of the statements I am about to read. - SUMMARY TABLE

Base: Those for whom sales is a part of their job

	Total	Agree	Disagree	Don't know	Prefer not to say
I am uncomfortable with my bank's approach to sales	188 100%	53 28%	113 60%	14 8%	8 4%
I feel that my bank's approach to sales is unethical	188 100%	32 17%	132 70%	14 8%	9 5%