



2014 GLOBAL CUSTOMER SERVICE BAROMETER

FINDINGS IN THE UNITED STATES



ebiquity

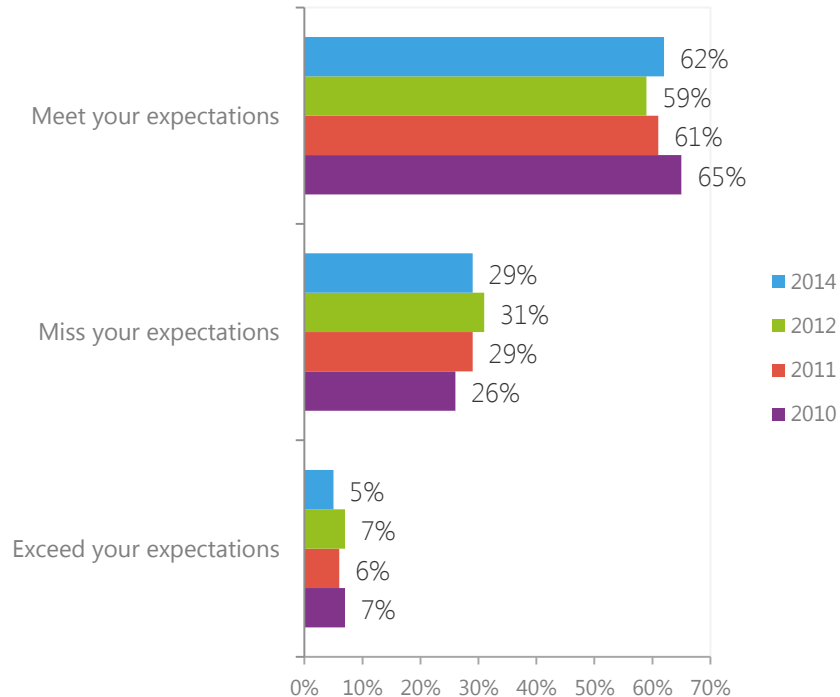
Data-driven insights

Research Methods

- This research was completed online among a random sample of consumers aged 18+. A total of 1,000 interviews were completed.
- Interviewing was conducted by Ebiquity between August 19 and September 2, 2014.
- The overall results have a margin of error of +/- 3.1 percentage points at the 95% level of confidence.

Companies still meeting consumers' expectations for customer service experiences

IN GENERAL, WOULD YOU SAY THE CUSTOMER SERVICE EXPERIENCES YOU HAVE WITH COMPANIES USUALLY...?

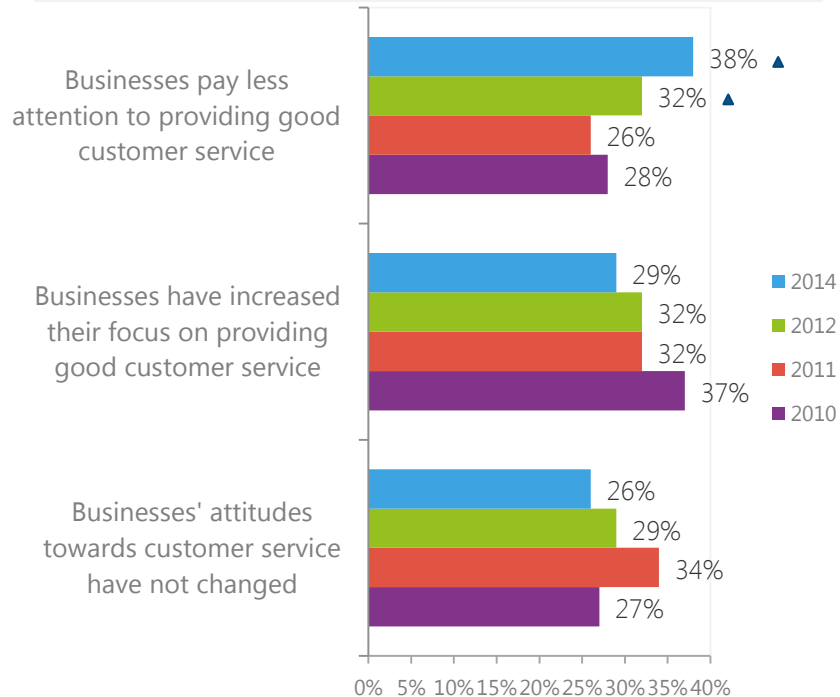


Just over six in ten (62%) believe that companies meet their customer service expectations (59%, 2012; 61%, 2011).

Down from 7% in 2012 and 6% in 2011, only 5% of consumers said that the customer service experiences they have with companies usually 'exceed their expectations' and 29% said that companies usually 'miss their expectations' for customer service (down from 31% in 2012 and the same as 29% in 2011).

More consumers think businesses are paying less attention to providing good customer service

IN THIS CURRENT ECONOMY, DO YOU THINK THAT ...?

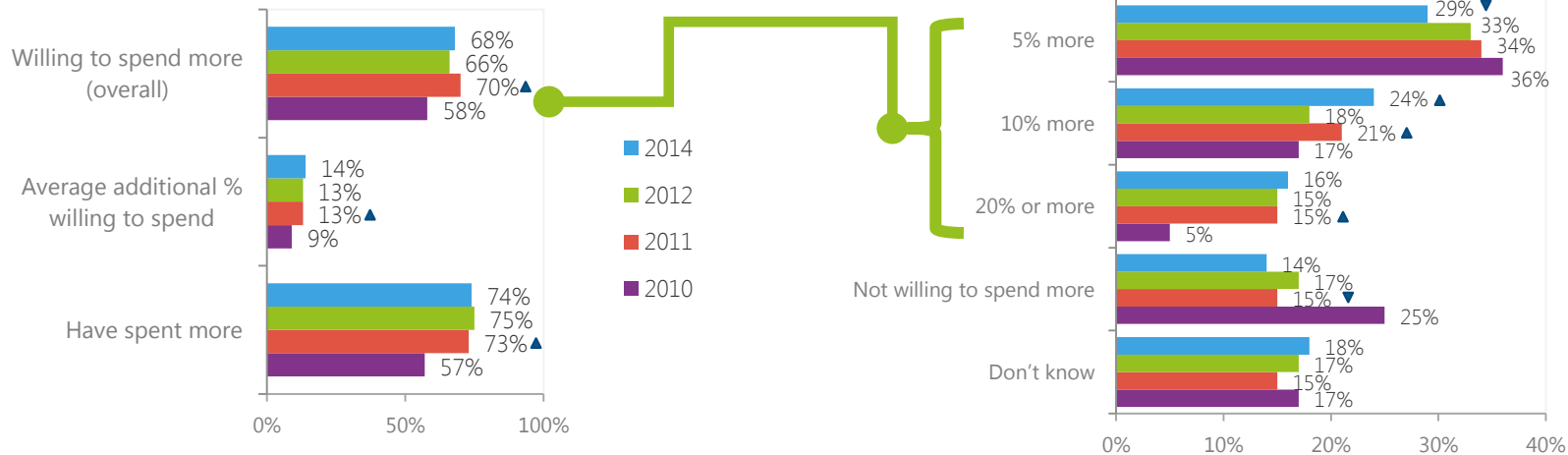


Although expectations for customer service are being met, nearly two in five consumers believe that, in this current economy, businesses 'pay less attention to providing good customer service', a significant increase over the past two years (38% vs. 32% in 2012, 26% in 2011).

The percent of consumers who believe businesses 'have increased their focus on providing good customer service' has declined since last year (29% vs. 32% in 2012 and 2011).

Motivation to pay more attention: consumers will spend more with companies that provide excellent service

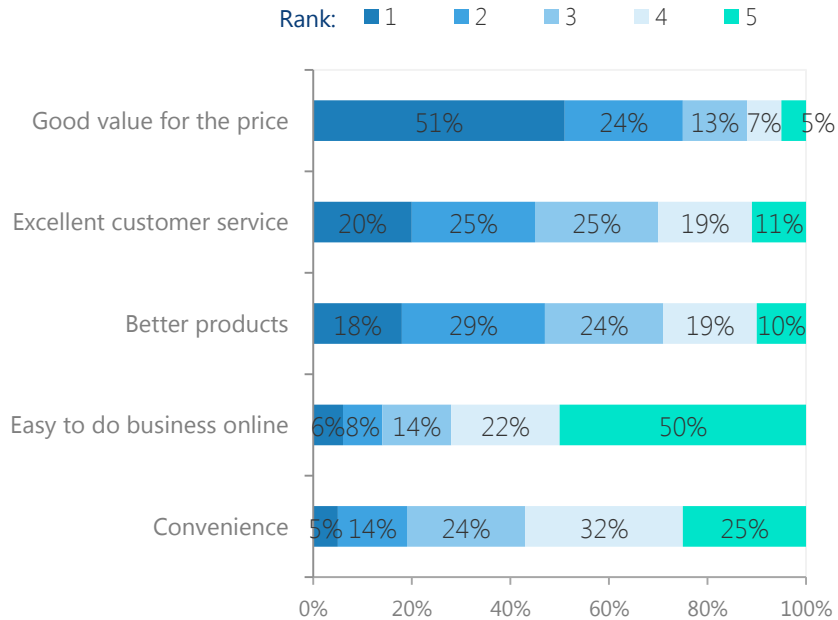
HOW MUCH MORE WOULD YOU BE WILLING TO SPEND WITH A COMPANY THAT YOU BELIEVE PROVIDES EXCELLENT CUSTOMER SERVICE?



Three out of four (74%) consumers say they have spent more with a company because of a history of positive customer service experiences, similar to the past two years (75% in 2012; 73% in 2011). Over two thirds (68%) of consumers state that they are willing to spend more with a company they believe provides excellent customer service; slightly higher than 2012 (66%) and nearing the seven in ten (70%) reported in 2011. On average they are willing to spend 14% more, slightly more than in the past two years (13% in 2012 and 2011).

Providing excellent service also helps companies attract new customers

RANK THE FOLLOWING IN TERMS OF WHICH ARE THE MOST IMPORTANT FACTORS WHEN YOU ARE CHOOSING A COMPANY WITH WHICH TO DO BUSINESS, WHERE 1 = MOST IMPORTANT AND 5 = LEAST IMPORTANT

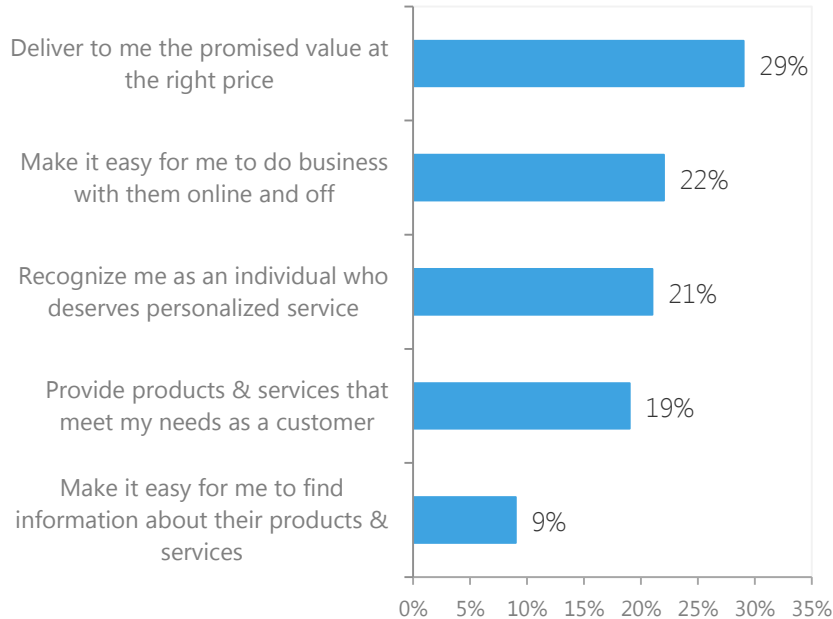


Behind providing 'good value for the price' (51%), providing 'excellent customer service' is the second most important factor consumers consider when choosing a company with which to do business (20%), followed closely by providing 'better products' (18%).

Consumers are least likely to consider 'ease of doing business online' (50%, least important) when choosing a company with which to do business.

Delivering on promised value will help companies exceed consumers' customer service expectations

WHICH ONE OF THE FOLLOWING IS THE BEST WAY THAT A COMPANY CAN STAND OUT AND EXCEED YOUR EXPECTATIONS FOR CUSTOMER SERVICE?

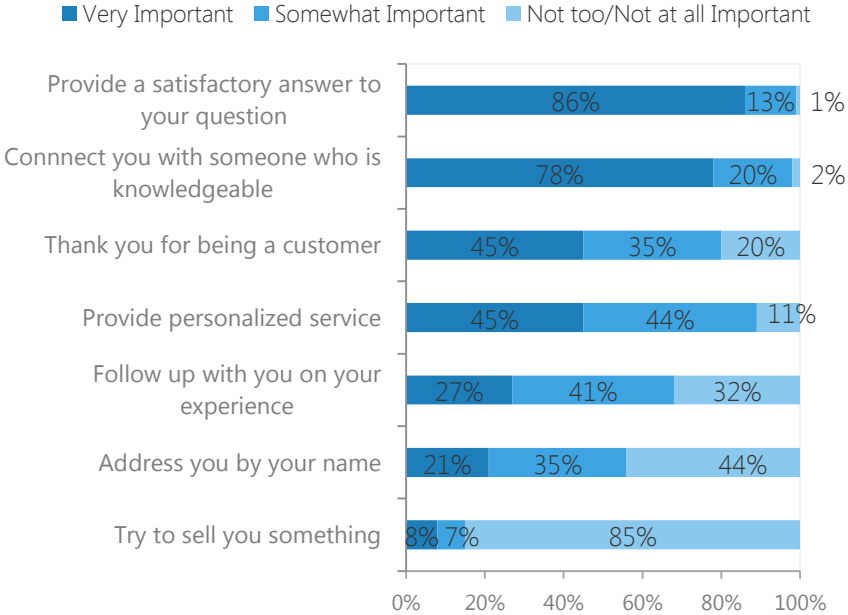


The best way that a company can stand out and exceed U.S. consumer expectations for customer service is simple – ‘deliver promised value at the right price’ (29%).

Consumers are also looking for ease in doing business – both online and off (22%). They want personalized service (21%) and products/services that meet their individual needs (19%).

To consumers, excellent service means getting their questions answered by knowledgeable representatives

HOW IMPORTANT ARE EACH OF THE FOLLOWING IN PROVIDING YOU WITH AN EXCELLENT CUSTOMER SERVICE EXPERIENCE?

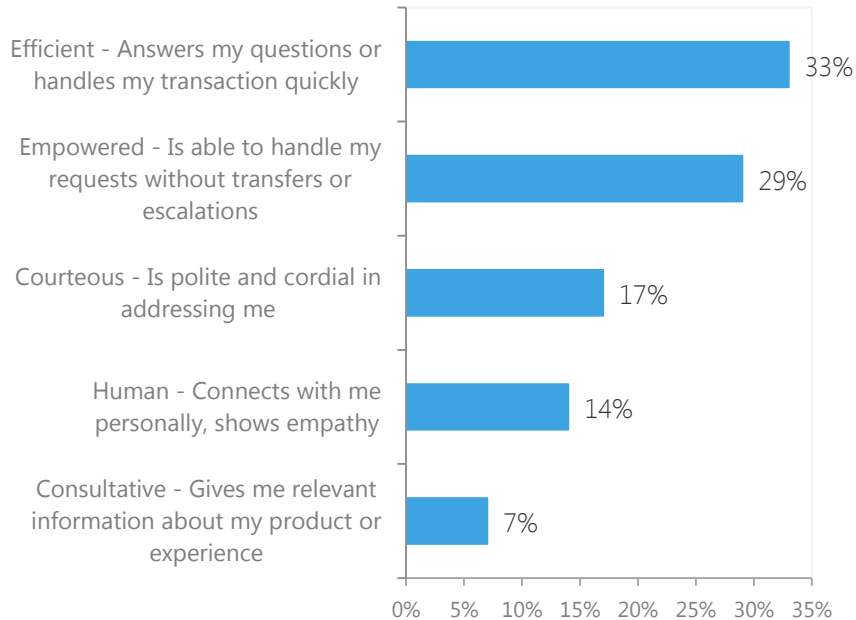


In order to provide consumers with an excellent customer service experience, representatives must be able to 'provide a satisfactory answer to their question' (86%) or be able to 'connect them with someone who is knowledgeable' (78%).

However, companies should not overlook providing personalized service (45%) and thanking customers for their business (45%).

Successful customer service representatives are efficient and empowered to handle requests

WHICH ONE OF THE FOLLOWING IS THE MOST IMPORTANT ATTRIBUTE OF A SUCCESSFUL CUSTOMER SERVICE PROFESSIONAL?

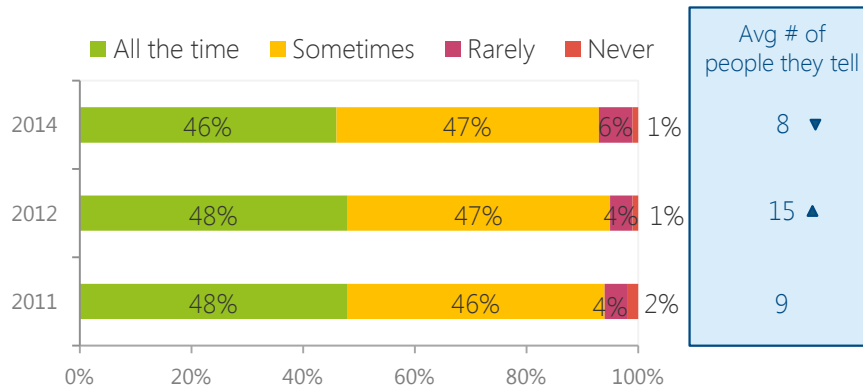


According to consumers, the most important attribute of a successful customer service professional is 'efficiency – the ability to answer questions or handle transactions quickly' (33%).

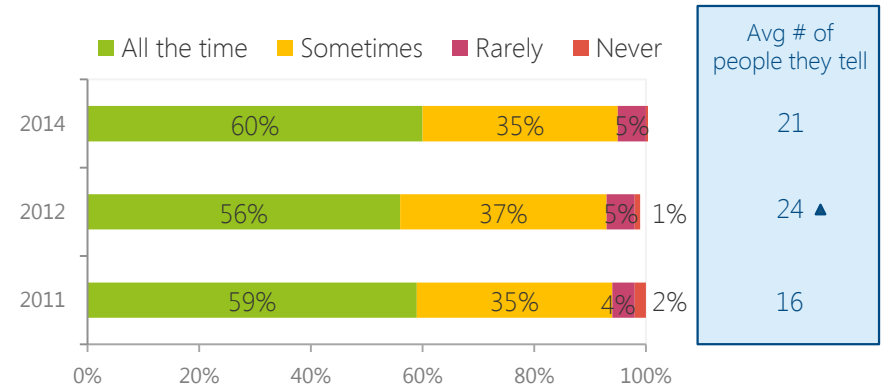
Consumers also find it important that a customer service professional is 'empowered to handle requests without transfers or escalations' (29%).

Consumers tell more people about their bad customer service experiences than their good experiences

HOW OFTEN DO YOU TELL OTHER PEOPLE ABOUT YOUR *GOOD* EXPERIENCE?



HOW OFTEN DO YOU TELL OTHER PEOPLE ABOUT YOUR *POOR* EXPERIENCE?



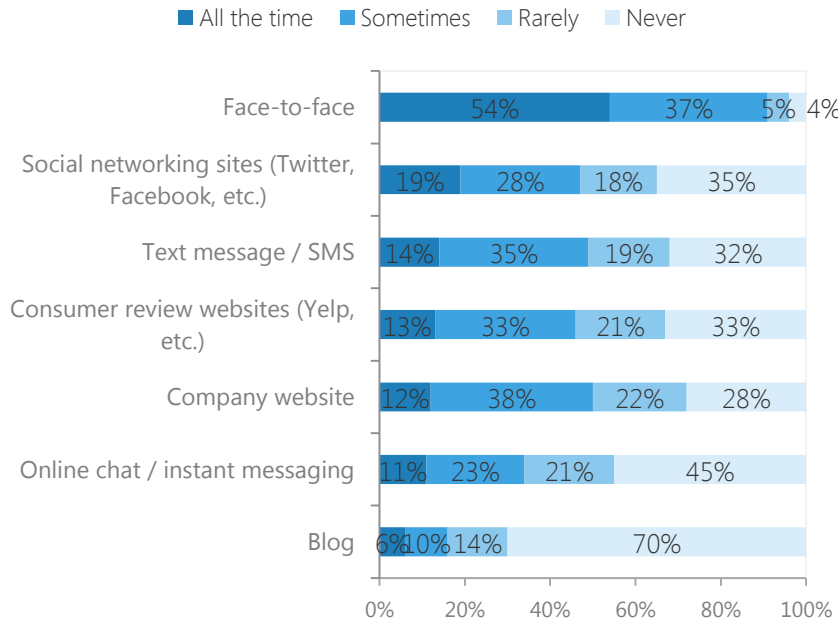
More than nine in ten consumers talk about their good customer service experiences, at least some of the time (93%), while 46% tell someone about them all of the time, similar to the past two years (48% 'all the time' in 2012 and 2011).

When it comes to poor customer service experiences, nearly all (95%) consumers talk about them, with 60% reporting that they talk about these experiences all of the time.

On average, consumers tell 8 people about their good experiences (15 in 2012; 9 in 2011), and over twice as many people about their bad experiences (21; 24 in 2012; 16 in 2011).

Consumers make use of various communication channels to talk about customer service experiences

HOW OFTEN DO YOU USE EACH OF THE FOLLOWING CHANNELS OF COMMUNICATION TO TELL PEOPLE ABOUT YOUR CUSTOMER SERVICE EXPERIENCES?

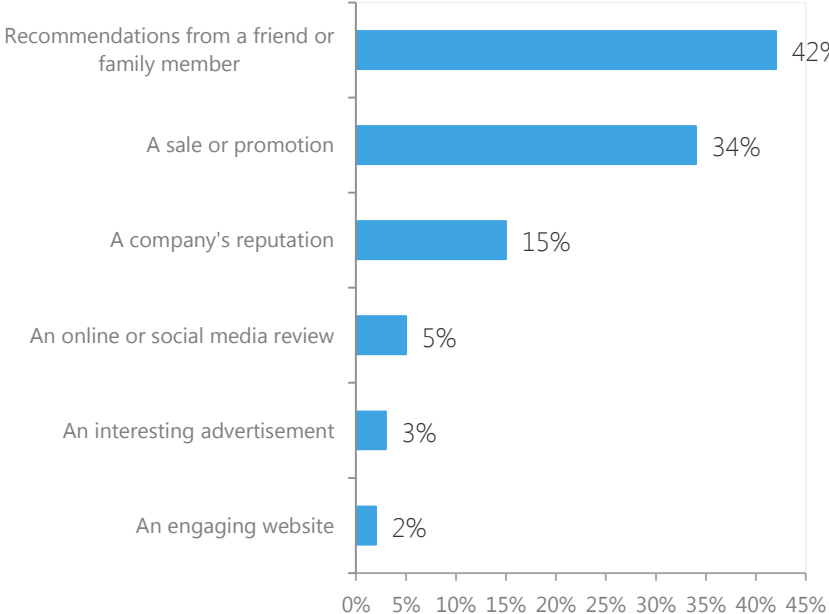


Most frequently, consumers tell others about their customer service experiences 'face-to-face' (54%, all the time).

They also make use of 'company websites' (50% always/sometimes), text messaging (49%), social networks and consumer review sites (46%, each).

Positive word-of-mouth is most likely to influence consumers to try a new company

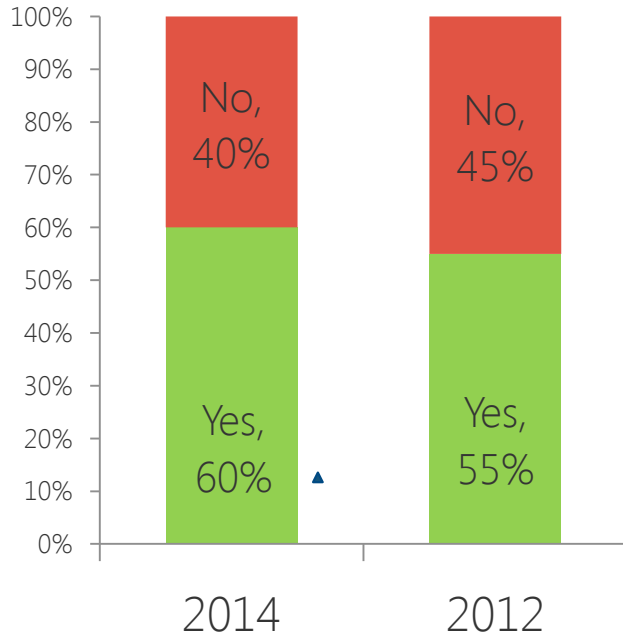
WHICH ONE OF THE FOLLOWING IS MOST LIKELY TO GET YOU TO TRY DOING BUSINESS WITH A NEW COMPANY?



Companies should take note that recommendations from friends and family is most likely to get consumers to try doing business with a new company (42%). Consumers report that positive word-of-mouth is even more important than a sale or promotion (34%).

Poor service can lead to lost sales

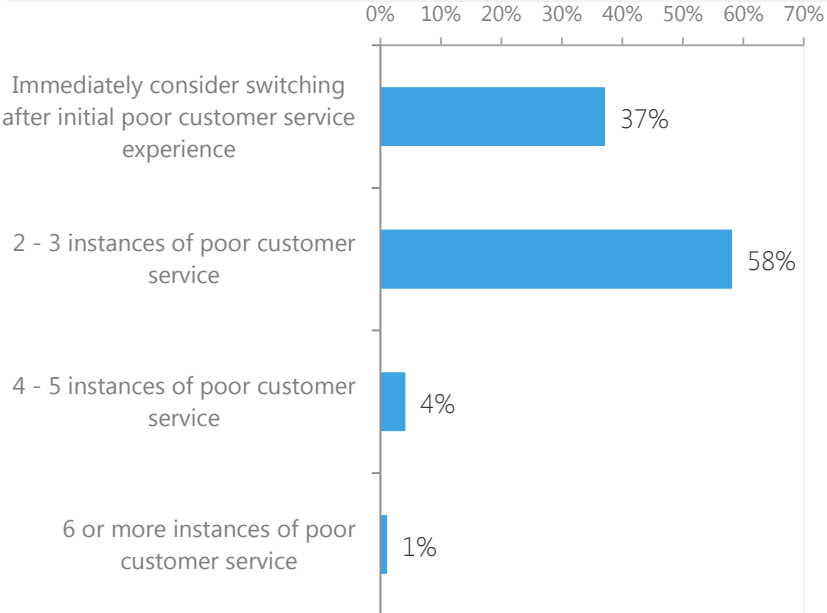
IN THE PAST YEAR, HAVE YOU INTENDED TO CONDUCT A BUSINESS TRANSACTION OR MAKE A PURCHASE BUT DECIDED NOT TO BASED ON A POOR CUSTOMER SERVICE EXPERIENCE?



In the past year, six-in-ten (60%) consumers intended to conduct a business transaction or make a purchase, but decided not to due to a poor service experience – a significant increase from 2012 (55%).

Consumers are generally willing to give companies a chance to make up for a bad service experience

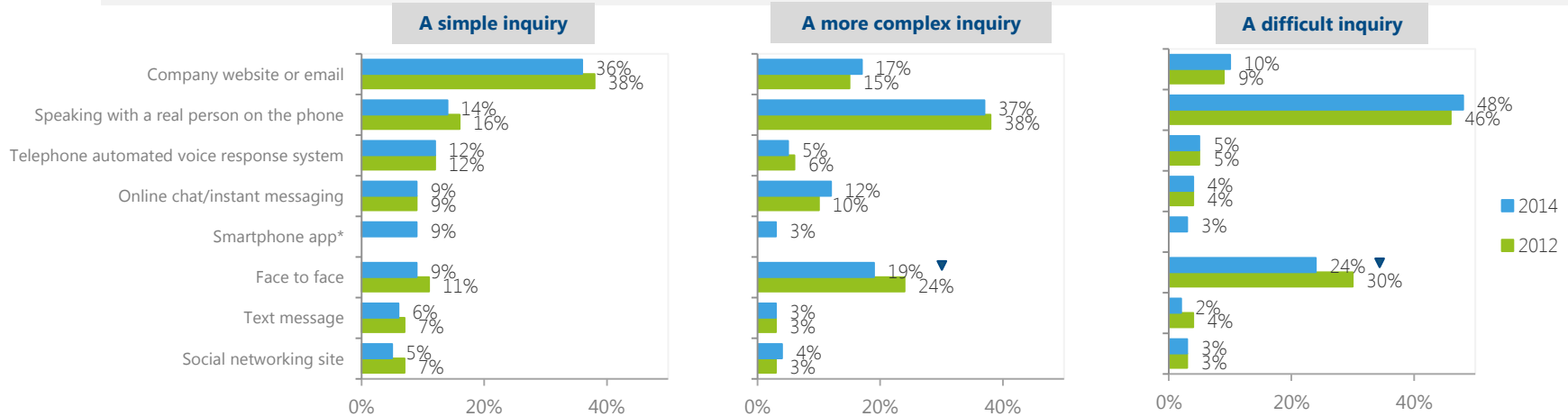
HOW MANY INSTANCES OF POOR CUSTOMER SERVICE ARE YOU WILLING TO EXPERIENCE FROM A COMPANY BEFORE YOU WILL CONSIDER SWITCHING COMPANIES?



While most consumers are willing to give a company at least one more chance after receiving poor service before they consider switching, over one-third (37%) immediately consider switching after the initial poor customer service experience.

Consumers' preferred channel for customer service inquiries varies depending on the complexity of the inquiry

FOR EACH OF THE FOLLOWING TYPES OF CUSTOMER SERVICE INQUIRIES, WHICH IS YOUR PREFERRED CHANNEL FOR REACHING OUT TO COMPANIES?



For simple issues, they prefer going online, but for anything more complicated they want to talk to a real person. The desire to deal with customer service reps face-to-face for any type of inquiry has decreased significantly since 2012.

For simple inquiries, such as locating a product or checking an account balance, over one-third (36%) of consumers prefer using a company website or email. For a more complex inquiry, such as returning a product or getting assistance with a product issue, just under two out of five (37%) consumers prefer speaking with a 'real' person on the phone, followed by a 'face to face' conversation (19%, down significantly from 24% in 2012), and using a company website or email (17%). For even more difficult or complicated inquiries, almost half of consumers (48%) prefer speaking with a 'real' person on the phone, 24% prefer a face to face interaction (down significantly from 30% in 2012), and only 10% prefer a company website or email.

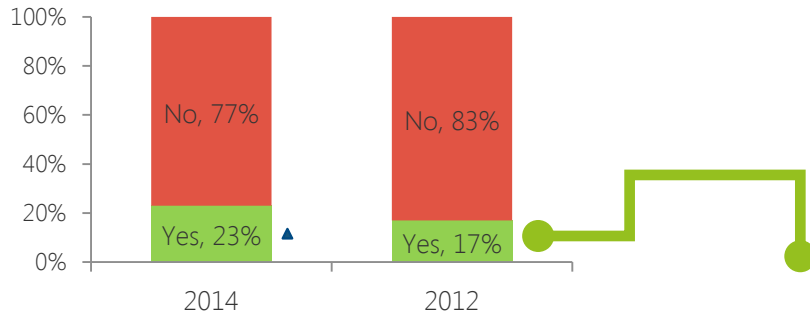


Customer driven insights



Social media is becoming a more common channel for consumers seeking a customer service response

IN THE PAST YEAR, HAVE YOU UTILIZED SOCIAL MEDIA TO GET A CUSTOMER SERVICE RESPONSE?



WHICH OF THE FOLLOWING ARE REASONS YOU USE SOCIAL MEDIA WHEN IT COMES TO CUSTOMER SERVICE?



Over one in five (23%) consumers say they have utilized social media to get a customer service response, a significant increase from 17% in 2012.

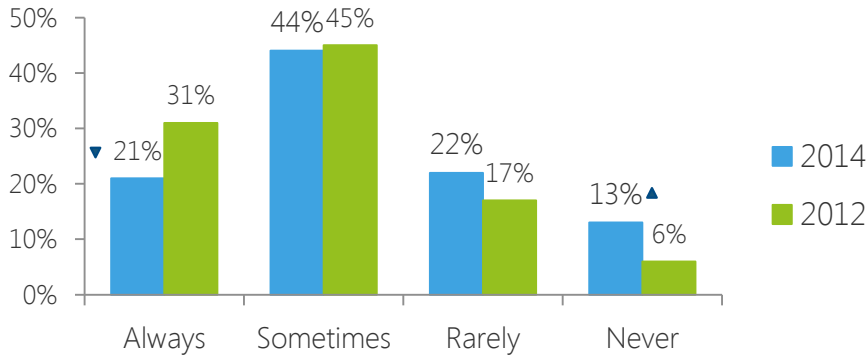
For those who have used social media for customer service, they have done so for a variety of reasons, including 'praising a company for a great service experience' (53%) and venting frustration with a bad customer service experience (50%). Compared to 2012, significantly fewer use social media to seek an actual response from a company to help them with a service issue (40% vs. 50% in 2012).

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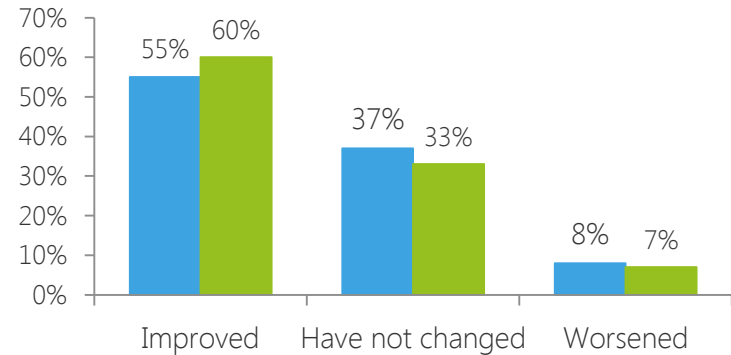
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Resolution of customer service issues via social media may be hit or miss, but consumers still see improvement

WHEN YOU USE SOCIAL MEDIA TO COMPLAIN ABOUT A CUSTOMER SERVICE ISSUE, HOW OFTEN DO YOU FEEL YOU GET AN ANSWER OR YOUR COMPLAINT IS RESOLVED BY THE COMPANY?



IN THE PAST YEAR, HAVE COMPANIES GENERALLY IMPROVED OR WORSENER IN TERMS OF HOW QUICKLY YOU FEEL THEY RESPOND TO YOU OVER SOCIAL MEDIA CHANNELS SURROUNDING A GENERAL INQUIRY OR COMPLAINT?

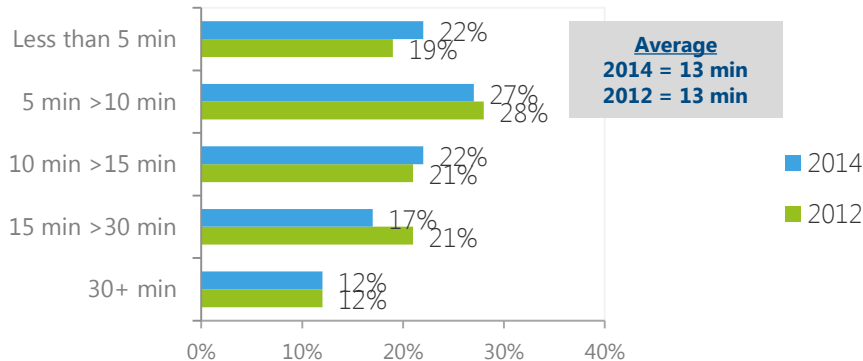


One in five (21%) consumers who have used social media for customer service inquiries say they always get an answer or have their complaint resolved, significantly lower than 2012 (31%, always). Greater than one-third (35%), however, say they rarely or never get an answer or have their complaint resolved – up from 23% in 2012.

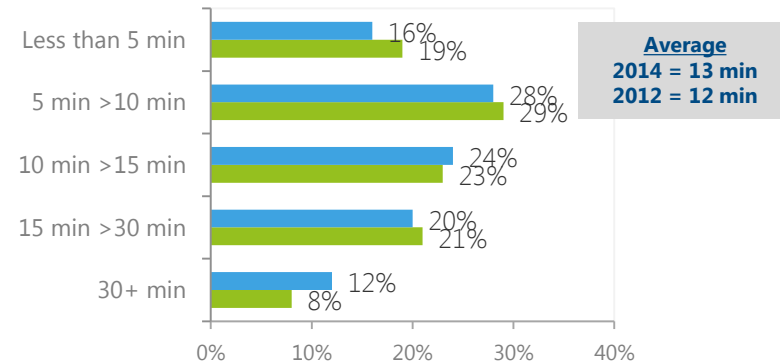
Despite this spotty record, over half of consumers (55%) still feel companies have generally improved their response times over social media channels (down from 60% in 2012).

Consumers are generally patient when it comes to their willingness to wait for customer service

WHEN YOU CONTACT A CUSTOMER SERVICE CENTER BY PHONE, WHAT IS THE MAXIMUM AMOUNT OF TIME YOU ARE WILLING TO WAIT ON HOLD?



WHAT IS THE MAXIMUM AMOUNT OF TIME YOU ARE WILLING TO WAIT FOR HELP FROM CUSTOMER SERVICE IN-PERSON (EX., AT A BANK, RETAIL STORE, SERVICE PROVIDER OR RESTAURANT)?



On average, consumers are willing to wait a maximum of 13 minutes on hold when they contact a customer service center by telephone (unchanged from 2012). Greater than one in five (22%) are willing to wait less than 5 minutes.

In person, consumers are also willing to wait an average of 13 minutes for customer service help (up slightly from 12 minutes in 2012).

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