

Consumer Survey 2006 – Global Results

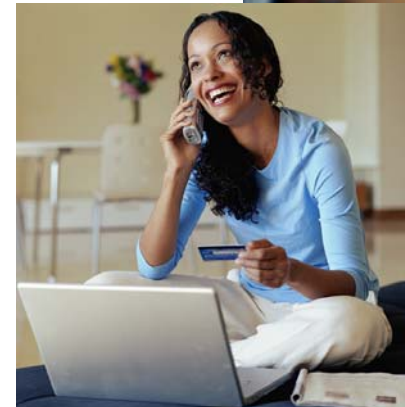
Summary with key findings



GENESYS®
AN ALCATEL-LUCENT COMPANY

Research methodology

- Over 3400 consumers in the Asia Pacific, Europe and the United States were surveyed in order to better understand consumer attitudes to contact centers and customer service
- The survey was conducted online in September 2006 by independent global research agency Lightspeed Research
- Respondents were aged 18 years and over and represented a national cross-section of consumers in terms of age, gender and region



Differences between and within regions

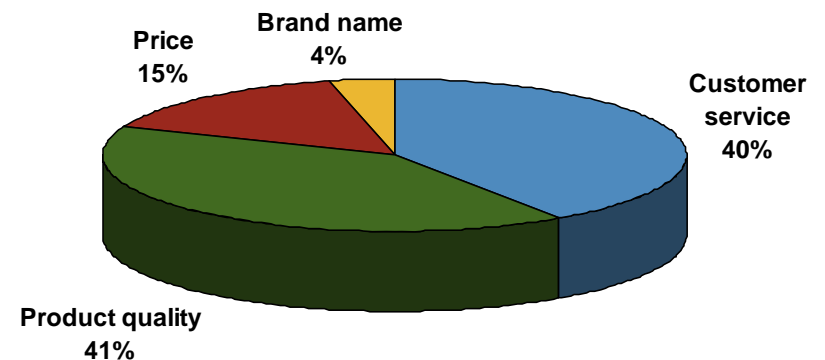
- This summary presents the global aggregate findings across the Asia Pacific, Europe and the United States
- Results for the three regions and for individual countries varied quite significantly in some instances
 - **Individual regional reports are available on request, as are individual country reports for Japan and each of the seven European countries in the study**



The contact center experience is the key to customer loyalty

- 40% of consumers say that customer service has the biggest impact on their loyalty to a company
- 75% say they would do business with a company based on a great call center experience
 - 15% would do so even if prices were higher than average

What has the biggest influence on your loyalty to a company?



A poor contact center experience has a direct impact on a company's bottom line

- 59% of consumers say the last time they stopped doing business with a company was partly or wholly due to a poor customer service experience
- 41% say that a poor call center experience was the *sole reason* they have stopped doing business with a company



N=3438, Genesys Global Consumer Survey September 2006

Consumers are frustrated by basic problems

- 70% are frustrated by long hold times
- 60% are frustrated by IVRs with too many or incorrect options
- 56% are frustrated by having to repeat information they've already provided



N=3438, Genesys Global Consumer Survey September 2006

Long hold times and being transferred are major concerns for consumers

- Long hold times are the biggest cause of frustration for consumers
 - 87% would prefer to receive a call-back in 10 minutes than to be on hold for that length of time
 - 74% would like the option to ask for a call back if the wait time is longer than they would like
- Having their issue resolved without being transferred is a major factor impacting consumers' satisfaction with a call center experience
 - However 90% of consumers don't mind being transferred to someone who has the skills and knowledge to answer their query more quickly or efficiently



N=3438, Genesys Global Consumer Survey September 2006



Consumer attitudes toward self-service

- 80% of consumers feel that companies are pushing them to use self-service systems instead of talking to live people
- 74% react negatively when they feel they are being pushed to use self-service
 - Only 11% tell the company
 - 65% feel less loyal and/or take their business elsewhere



N=3438, Genesys Global Consumer Survey September 2006

Consumers actually *want* to receive cross-sell offers

- 83% of consumers would like companies to tell them about other products and services that may benefit them
- Of these:
 - 93% would like to receive proactive communications via the phone, email and/or SMS
 - 18% say they would like to receive a cross-sell offer when they call a supplier about something else and their query has been resolved
 - 80% would like to receive cross-sell offers and information via email



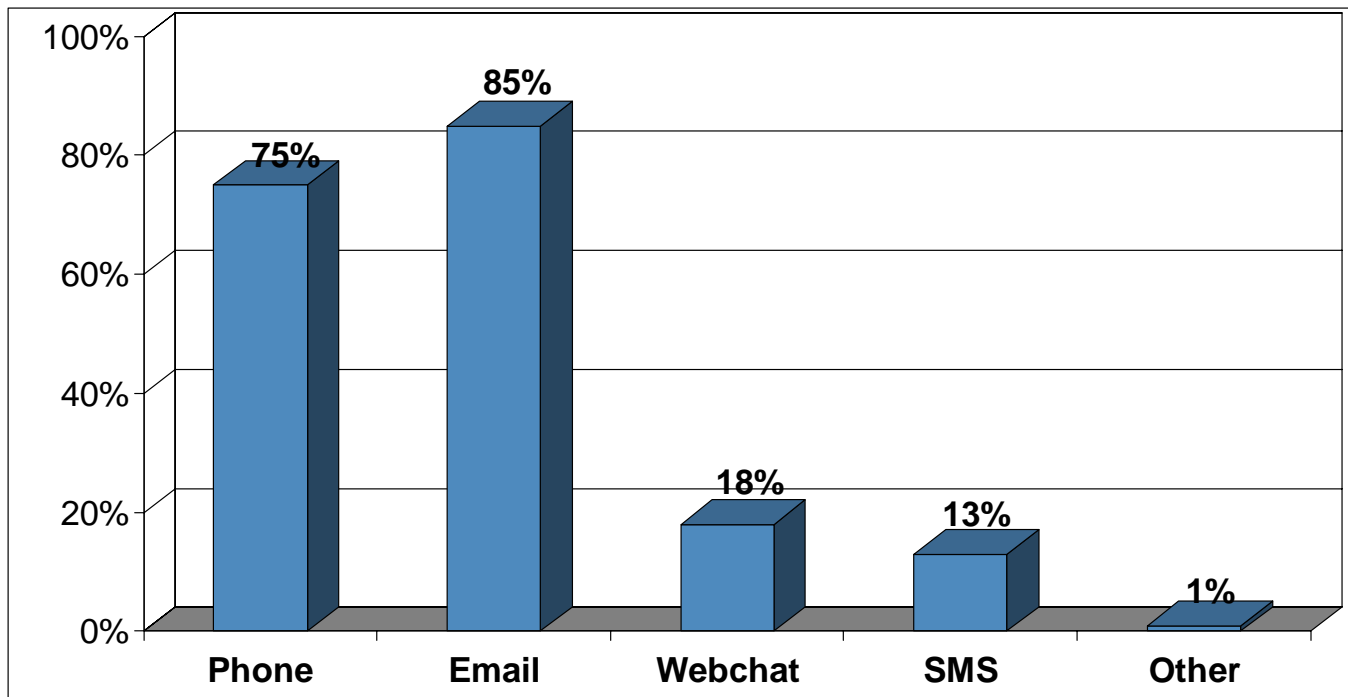
Consumers value proactive outbound communications

- 85% of consumers would have a more positive opinion of a supplier after receiving a courtesy call just to thank them for their business or ask them how satisfied they are
 - Only 43% have received a courtesy call from a supplier
- 87% of consumers would like to receive pro-active communications from companies to keep them informed about service delivery and/or other products and services that may be of interest to them



Consumers are becoming increasingly interested in new channels

By which methods would you like to communicate with a contact centre?



N=3438, Genesys Global Consumer Survey September 2006

Consumers increasingly want to communicate via email, and expect a fast response

- 85% of consumers would like to communicate with a company via email and 44% say that email is their *most* preferred method of communication
- 80% would like companies to email them with information about other products and services they may be interested in
- 19% expect a response to their email within 1 hour – in 2003 only 6% of consumers expected a response in that timeframe (Genesys Global Consumer Survey June 2003)
 - 17% expect an email response within 4 hours, and 48% within 24 hours



Consumer preference for web chat is increasing

- 11% of consumers have used web chat (instant messaging) to communicate with a contact center in the last 12 months
- 23% would like the option of communicating with companies via web chat instead of over the phone
- 95% of consumers use companies' websites to find out how to contact them by phone or online
 - 39% say they have difficulty finding this contact information

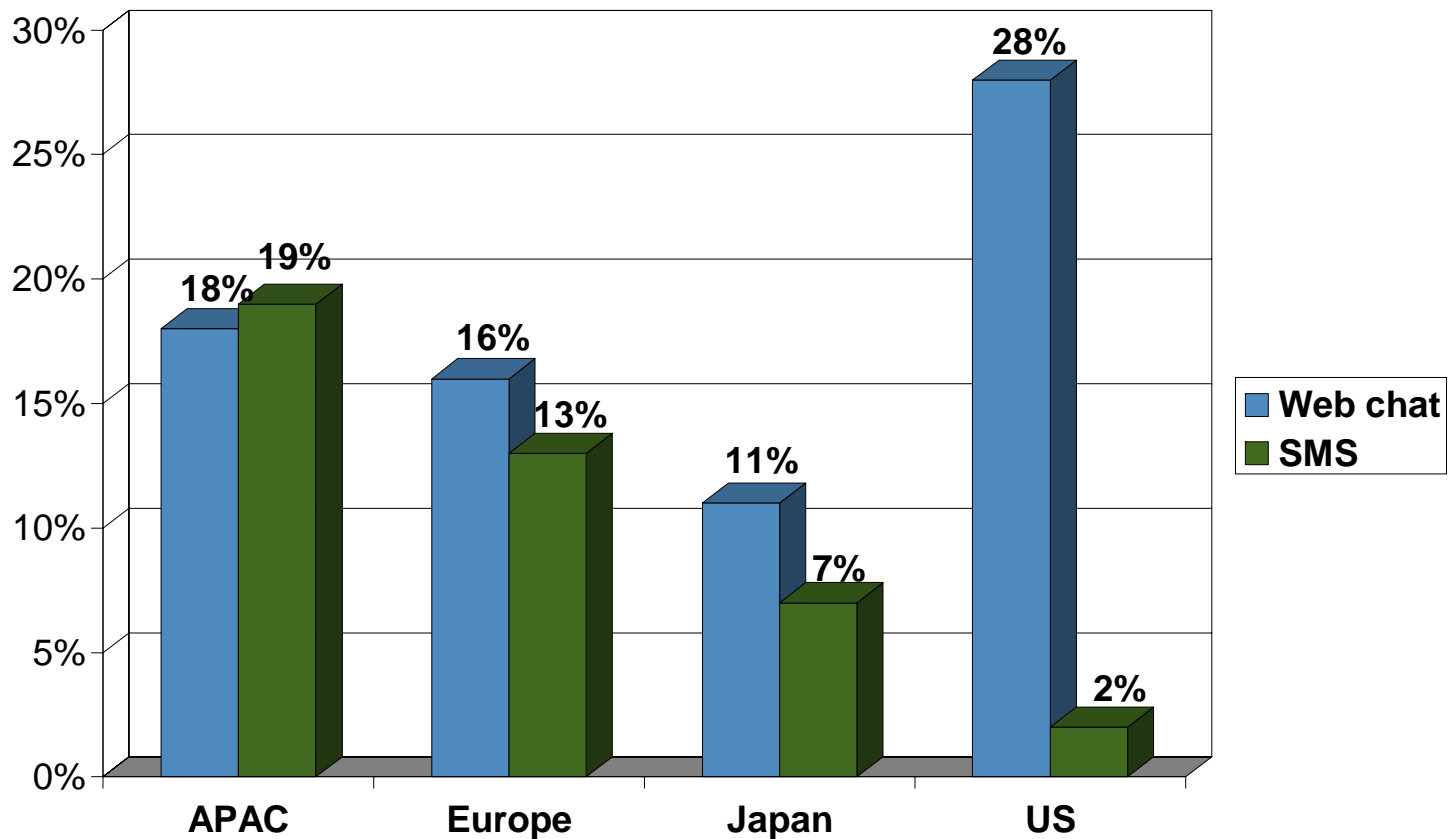


Consumer preference for SMS is increasing

- 13% of consumers would like to use SMS to communicate with contact centers
- 14% of consumers would like to receive information about other products and services via SMS



Consumer interest in new channels varies significantly across regions



For more information...

The following additional sources of information are available from RevGen or your Regional Marketing Director:

- Summary reports for APAC, Europe and the USA
- Individual reports for Japan and the seven European countries
- Raw results files with further detail on differences between age groups

