

Genesys Global Consumer Survey • 2007



Genesys commissioned a survey of over 4,200 consumers in the Asia Pacific, Europe and the United States, in order to better understand consumer attitudes toward call centres and customer service. The 30-question survey was conducted online, and was completed by consumers who had dealt with a contact centre in the previous 12 months via phone, email, SMS or web chat (instant messaging). Respondents were aged 18 and over, and represented a national cross-section of consumers in each country in terms of age and gender.

Please note that this report presents the global aggregate results, and regional results varied quite significantly across a number of questions. Individual regional reports are available on request, as are individual country reports for United States, Japan and each of the ten European countries in the study.

Executive Summary

The contact centre is often the first (and sometimes the only) human interaction a customer has with a company, and many customers form their perception of a company based on their experience with that company's contact centre. This survey highlights the importance of the contact centre experience and the direct impact it can have on revenue and consumer loyalty. It also reveals some interesting trends in consumer expectations which vary considerably across geographical regions.

While most contact centres have typically been managed as a resource that responds to customers' requests for service, a significant opportunity exists for contact centres to be more proactive in building engaging relationships with their customers. 89% of consumers have indicated they would like to receive proactive communications from their suppliers.

Perhaps surprisingly 84% of consumers would also like to hear about a company's additional products and services, giving companies the opportunity to up-sell and cross-sell to customers while engaging them at the same time.

Consumers increasingly wish to communicate with companies using newer technologies, and value having access to multiple channels. 19% would like to have the

option of live online web chat instead of talking over the phone, and 86% would like to communicate with contact centres using email. 17% would like to be able to communicate via text messaging (SMS).

However despite their increased preference for new technologies consumers do not like to feel that they are being overly pushed into using self-service systems, and companies that do so risk losing customers and revenue, as well as missing out on the opportunity to engage with customers through human interaction.

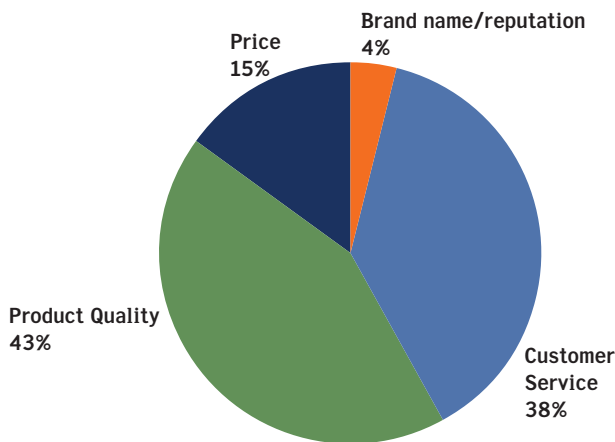
Finally, there is still considerable room for basic improvement in contact centre performance. There are a few major causes of frustration for customers when dealing with contact centres, and companies need to address basic issues like long hold times and the incidence of transfers in order to make the customer experience a satisfactory one.

In today's competitive environment successful companies will be those that address the main sources of consumer frustration with contact centres, use new channels wisely to enhance customer service while minimising operational costs, and seize every opportunity to engage customers by making their contact centre experience a powerful one.

Key Findings

The contact centre experience is the key to customer loyalty

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



38% of consumers say that customer service has the biggest impact on their loyalty to a company

Other findings:

- 75% say they would do business with a company based on a great call centre experience
 - 15% would do so even if prices were higher than average
- 50% say the last time they stopped doing business with a company was partly or wholly due to poor customer service
- *In the past, 40% of consumers have stopped doing business with a company solely due to a poor call centre experience*

Consumers value proactive outbound communications

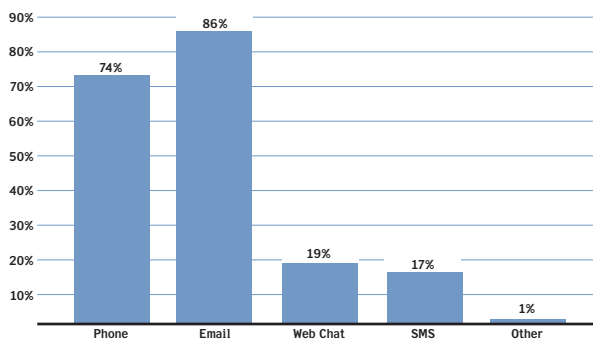
- 87% of consumers would have a more positive opinion of a supplier after receiving a courtesy call just to thank them for their business or ask them how satisfied they are
 - Only 42% have received a courtesy call from a supplier
- 89% of consumers would like to receive proactive communications from companies to keep them informed about service delivery and/or other products and services that may be of interest to them

Consumers actually want to receive cross-sell offers

- 84% of consumers would like companies to tell them about other products and services that may benefit them. Of these:
 - 14% say they would like to receive a cross-sell offer when they call a supplier about something else and their query has been resolved
 - 82% would like to receive cross-sell offers and information via email
 - **93% would like to receive proactive communications via the phone, email and/or SMS**

Consumers are increasingly interested in communicating with companies via new channels

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



86% of consumers would like to communicate with a company via email and 45% say that email is their most preferred method of communication

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

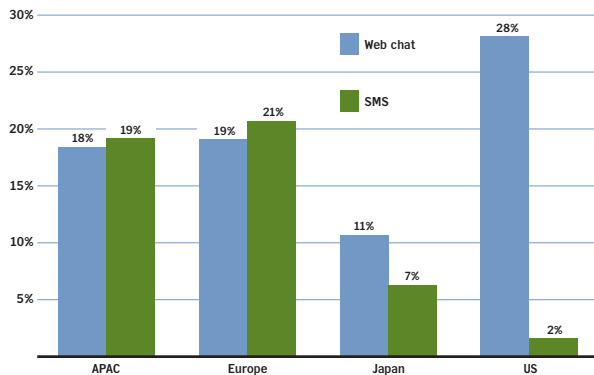
- 82% would like companies to email them with information about other products and services they may be interested in
- 95% use companies' websites to find out how to contact them by phone or online
 - 35% say they have difficulty finding this contact information
- 21% expect a response to their email within 1 hour
 - in 2003 only 6% of consumers expected a response in that timeframe*
 - 17% expect an email response within 4 hours, and 47% within 24 hours

* Genesys Global Consumer Survey June 2003

Consumer preferences for SMS and web chat are increasing

- 24% of consumers would like the option of using web chat (instant messaging) to communicate with companies instead of talking over the phone
- 17% of consumers would like to use SMS to communicate with contact centres
- Preference for new channels is not limited to younger age groups (please see regional reports for further information)
- *21% of consumers would like to receive information about other products and services via SMS*

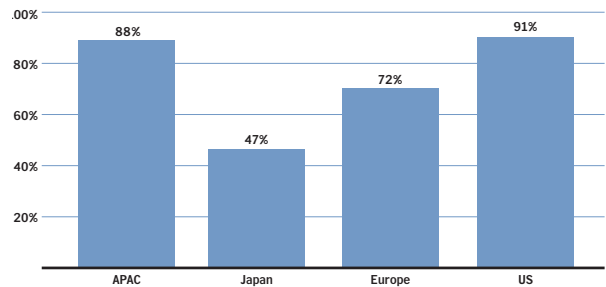
Consumer interest in new channels varies across regions



Consumer interest in SMS and web chat varies significantly across and within regions (please see regional reports for further information)

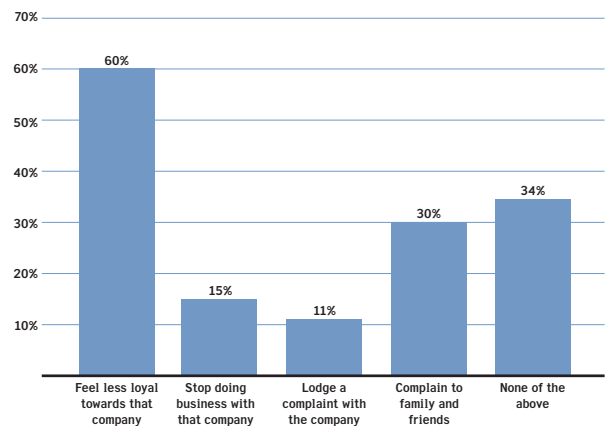
Consumer attitudes toward self-service

Percentage of consumers who feel they're being pushed toward self-service



76% of consumers feel that companies are pushing them to use self-service systems instead of talking to live people, but this varies significantly across regions

What do you do if a company pushes you to use self-service?

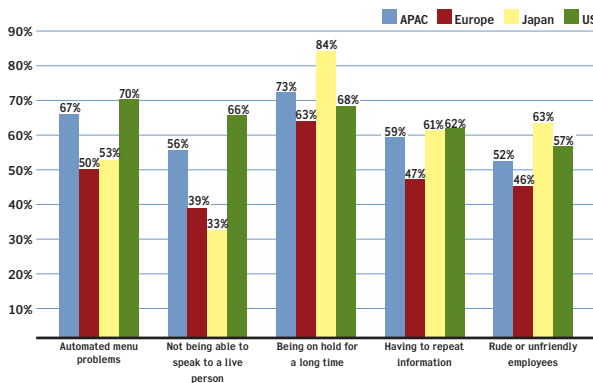


66% react negatively when they feel they are being pushed to use self-service

- Only 11% tell the company – 75% feel less loyal and/or take their business elsewhere

Knowledgeable agents, being transferred, and long hold times are major concerns

What frustrates you the most when dealing with a contact centre?



- Long hold times are a major cause of frustration for consumers around the world
 - 88% 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
- Consumers are frustrated by basic problems:
 - 67% are frustrated by long hold times
 - 57% are frustrated by IVRs with too many or incorrect options
 - 52% are frustrated by having to repeat information they've already provided
- *Having their issue resolved without being transferred also has a significant impact on consumers' satisfaction with a call centre experience*
 - *However 89% of consumers don't mind being transferred to someone who has the skills and knowledge to answer their query more quickly or efficiently*

Additional Information

To learn more about Genesys solutions, please visit www.genesyslab.com

About Genesys Telecommunications Laboratories, Inc.

Genesys, an Alcatel-Lucent company, is the only company that focuses 100% on software to manage customer interactions over the phone, web and in email. The Genesys software suite dynamically connects customers with the right resources – self-service or assisted-service – to fulfill customer requests, optimise customer care goals and efficiently use resources. Genesys software directs more than 100 million customer interactions every day for 4,000 companies and government agencies in 80 countries. These companies and agencies can leverage their entire organisation, from the contact centre to the back office, to improve the overall customer experience. As a result, Genesys helps stop customer frustration, drive efficiency, and accelerate business innovation.



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