2012 Global Customer Service Barometer

Market Comparison of Findings

A research report prepared for:





Research Method



- This research was completed online among a random sample of consumers aged 18+ in: Australia, Canada, France, Germany, India, Italy, Japan, Mexico, Netherlands, UK, and US.
- The sample size for each market is as follows:

N=1,000 N=1,003 N=1,002 N=1,013 N=1,003 N=1	000

U.K.	Netherlands	Australia	India	Japan
N=1,000	N=1,001	N=1,000	N=1,007	N=1,001

- Interviewing was conducted by Echo Research during February and March, 2012.
- Overall the results in each market have a margin of error of +/- 3.1 percentage points at the 95% level of confidence.



Many businesses have not changed their attitudes towards customer service

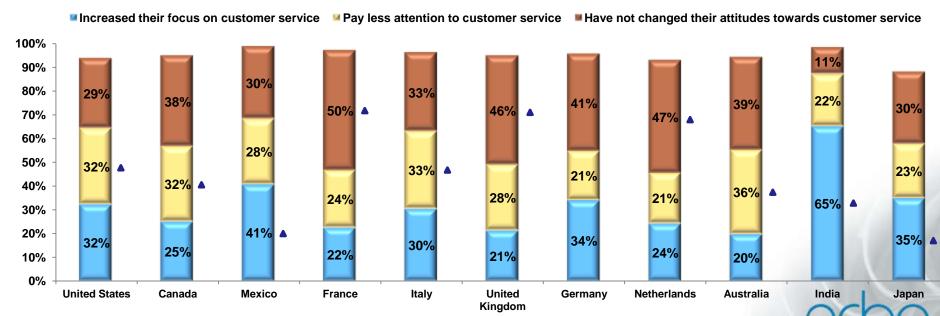


In most markets, one third or fewer consumers see an 'increased focus on customer service' on the part of businesses in the current economy. However, significantly more consumers in India (65%), Mexico (41%), and Japan (35%) give businesses credit for making the extra effort.

In Australia (36%), Italy (33%), U.S. and Canada (32%, each) significantly more consumers think that companies are 'paying less attention to customer service' in the current economy compared to other countries.

Consumers in France (50%), the Netherlands (47%), and the U.K. (46%) are the most likely to say that businesses' 'attitudes towards customer service have not changed.'

In this current economy do you think that businesses...?

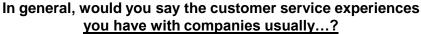


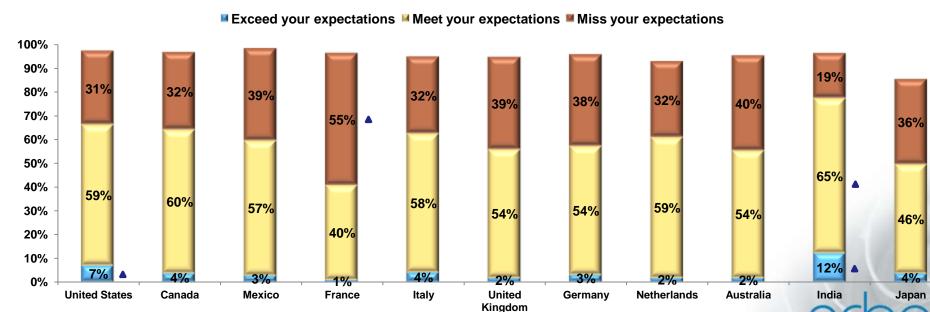
Businesses may be meeting, but not exceeding consumers' expectations for customer service



Over one half to nearly two thirds of consumers across all markets, except Japan (46%) and France (40%), believe that companies generally 'meet their expectations' for customer service. However, three in ten consumers in most markets believe that companies usually 'miss their expectations,' significantly higher – over half – in France (55%).

With the exception of India (12%), fewer than one in ten consumers across all markets believe that companies generally 'exceed their expectations' for customer service. Those in the U.S. (7%) are also more likely to think so.





Consumers believe that businesses are generally not going the extra mile for customer service

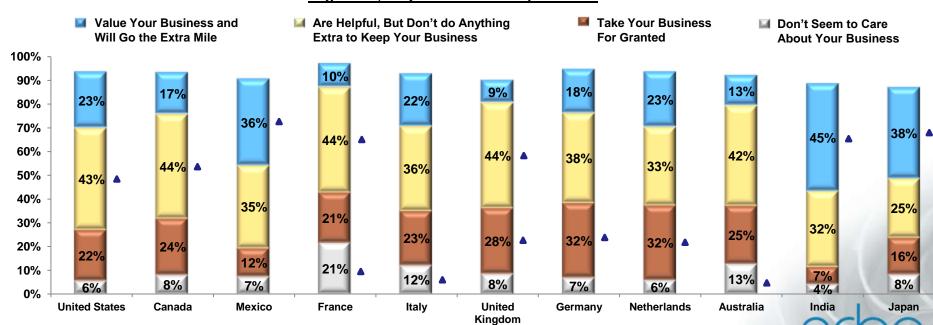


In most markets, two in five consumers or more believe that companies 'are helpful, but don't do anything extra to keep their business.' Consumers in France, Canada, the U.K. (44%, each) and the U.S. (43%) are the most likely to believe this to be true, while those in Japan are least likely (25%).

A significantly higher proportion of consumers in India (45%), Japan (38%) and Mexico (36%) think that companies 'value their business and will go the extra mile.'

In Germany, the Netherlands (32%, each) and the UK (28%), more consumers believe that companies 'take their business for granted.' While in France (21%), Australia (13%), and Italy (12%) more consumers think that companies 'don't care about their business.'





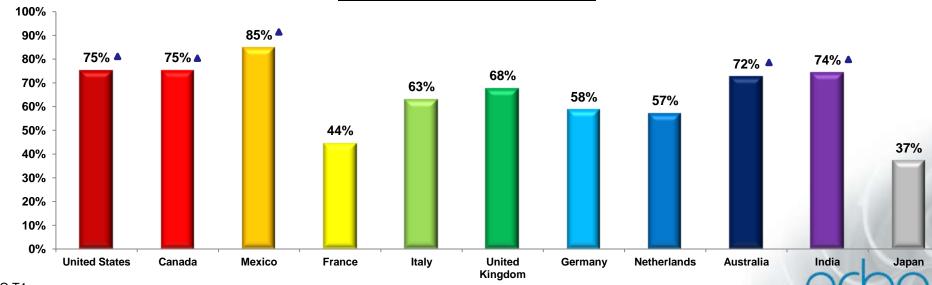
Consumers have spent more for customer service



With the exception of France (44%) and Japan (37%), over half of consumers have spent more with a company because of a history of positive customer service experiences.

Consumers in Mexico (85%), the U.S., Canada (75%, each), India (74%), and Australia (72%) are more likely to have done so compared to those in other countries.



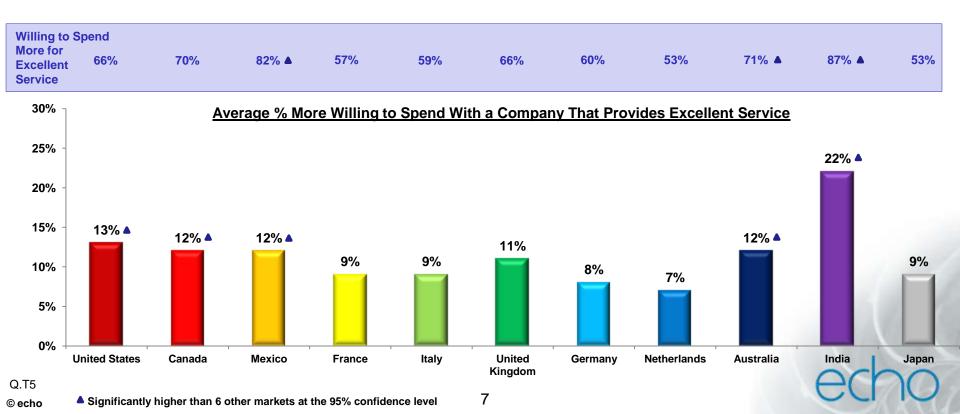


Consumers will spend more with companies that provide excellent service

AMERICAN EXPRESS

Across all markets, over half of consumers indicate that they are willing to spend more with companies that they believe provide excellent service – significantly more consumers in India (87%), Mexico (82%) and Australia (71%) say they are willing to do so.

Consumers are willing to spend the most, on average, in India (22% more), the U.S.(13% more), Australia, Canada and Mexico (each 12% more).



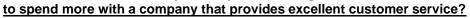
Those willing to spend more see value in excellent service and believe those companies have earned their business

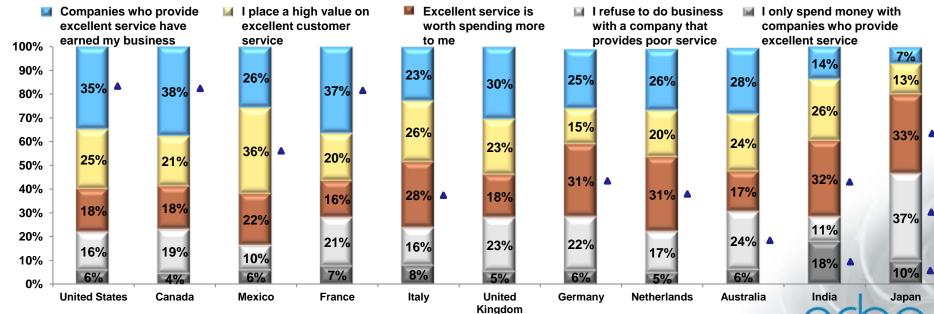


For reasons why they would be willing to spend more with a company that provides excellent service, consumers in Canada (38%), France (37%) and the U.S.(35%) are most likely to say it is because those companies have earned their business.

Consumers in Mexico (36%) are most likely to say that it is because they place a high value on excellent customer service. Consumers in Japan (33%), India (32%), Germany, the Netherlands (31%, each) and Italy (28%) are most likely to say it is because excellent service is worth spending more. In Japan (37%) and Australia (24%), consumers are more likely to refuse to do business with a company that provides poor service. And, consumers in India (18%) and Japan (10%) are most likely to only spend money with companies that provide excellent service.

Why would you be willing





Q.T5B: Respondents willing to spend more with a company that provides excellent service

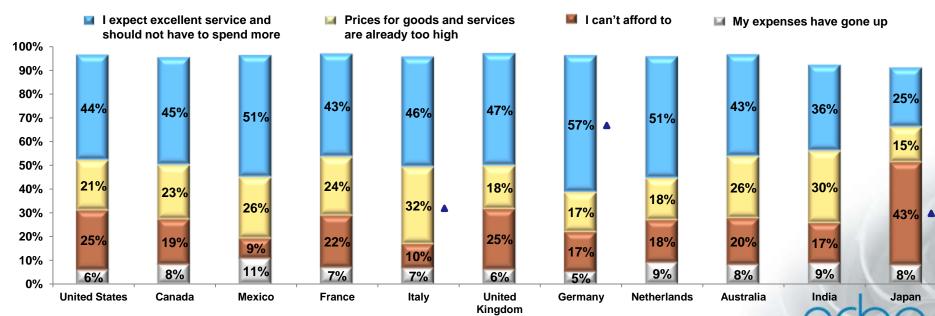
Many consumers expect excellent service and do not believe they should have to spend more to get it



With the exception of Japan (25%) and India (36%), greater than two in five consumers who would not be willing to spend more with a company that they believe provides excellent customer service say it is because they expect excellent service and should not have to spend more to get it. Consumers in Germany (57%) are significantly more likely to feel this way.

Other consumers say that their lack of willingness to spend more comes down to money. Roughly one in five or more say that prices for goods and services are already too high – in Italy it is significantly higher (32%). And, one in ten or more say that they can't afford to spend more – significantly higher in Japan (43%).

Why would you *not* be willing to spend more with a company that provides excellent customer service?



Q.T5A: Respondents not willing to spend more with a company that provides excellent service

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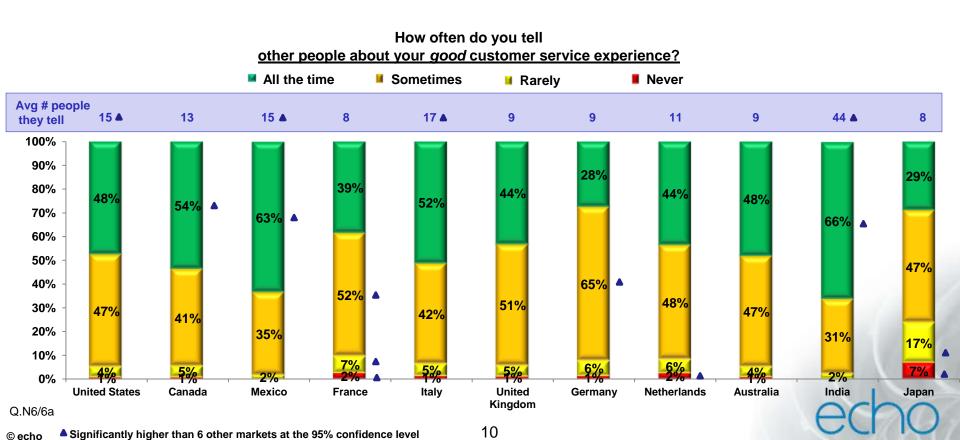
▲ Significantly higher than 6 other markets at the 95% confidence level

Consumers are likely to tell others about their good customer service experiences



With the exception of Germany (28%) and Japan (29%), two in five or greater tell other people about their good customer service experiences all of the time.

Consumers in Japan are the least likely to tell others about their good service experience (24% rarely/never) and tell the fewest number of people (8 on average). On the other hand, consumers in India tell the most people (44on average) about their good experiences, and do so most frequently (66% all the time).

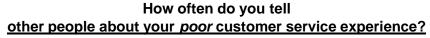


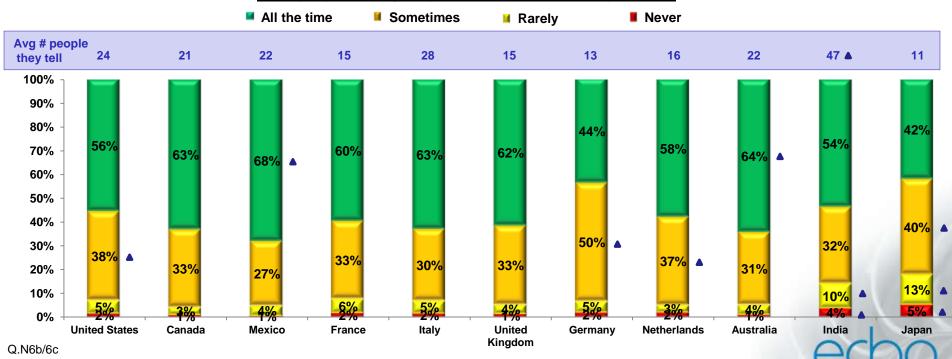
Consumers are *more* likely to tell others about their *poor* customer service experiences



In nearly all countries, significantly more, three in five or greater, tell other people about their poor customer service experiences all of the time – with the exception of Japan (42%), Germany (44%), India (54%) and the U.S. (56%). Consumers in Mexico and Australia do so most frequently (68% and 64%, respectively, all the time).

Consumers in Japan are also the least likely to tell others about their poor service experience (18% rarely/never) and tell the fewest number of people (11 on average). While consumers in India tell the most people (47 on average) about their poor experiences.



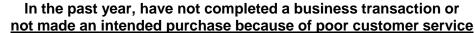


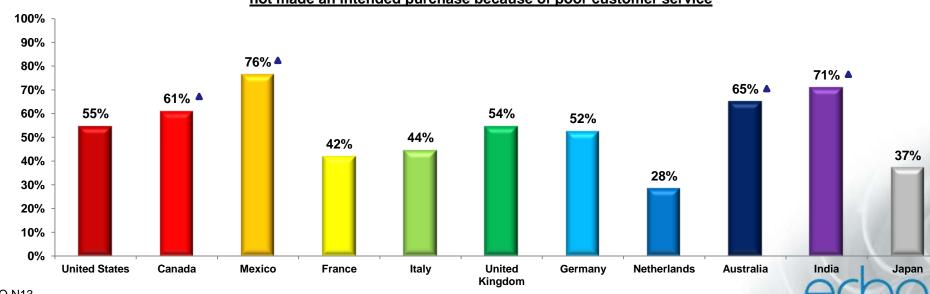
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Poor service leads to lost sales



In the past year, two in five consumers or more in most markets indicate that they have not completed a transaction or made an intended purchase because of poor customers service – significantly more consumers in Mexico (76%), India (71%), Australia (65%) and Canada (61%) are most likely to agree. Significantly fewer consumers in Japan (37%) and the Netherlands (28%) have done so.



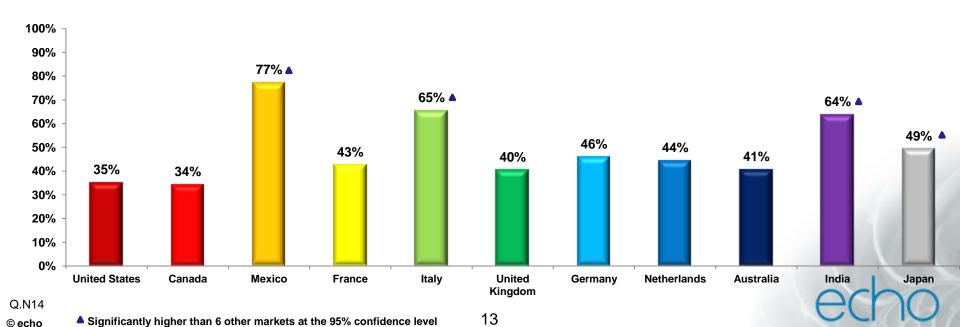


Some consumers may lose their temper with customer service professionals



In the past year, two in five consumers or more in most markets indicate that they have lost their temper with a customer service professional – significantly more consumers in Mexico (77%), Italy (65%), India (64%) and Japan (49%) agree. Significantly fewer consumers in the U.S. (35%) and Canada (34%) have done so.

In the past year, have lost their temper with a customer service professional



When losing their temper with a customer service professional, consumers act out in different ways



When losing their temper with a customer service professional, consumers in the U.S., Canada, U.K., Australia and India are most likely to insist on speaking with a supervisor. Those in France and the U.K. are most likely to threaten to switch to a competitor. Consumers in Germany and India are most likely to demand to know the customer service professional's name. Those in India are the most likely to talk about their experience via social media. Consumers in Japan are most likely to storm out of the store. Consumers in Australia, Canada and India are most likely to use profanity.

Which of the following have you done when you lost your temper with a customer service professional?

		*									•
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
Insisted on speaking with a supervisor	71%	66%	54%	49%	38%	65%	33%	31%	63%	61%	23%
Threatened to switch to a competitor	40%	43%	15%	51%	29%	46%	32%	25%	40%	37%	9%
Hung up the phone	36%	39%	25%	23%	28%	37%	30%	33%	39%	34%	19%
Demanded to know the customer service professional's name	29%	27%	26%	18%	22%	32%	34%	23%	26%	41%	19%
Talked about your experience via social media	24%	20%	24%	16%	21%	19%	18%	13%	21%	29%	9%
Stormed out of the store	15%	21%	18%	10%	13%	10%	9%	10%	19%	18%	27%
Used profanity	10%	12%	3%	8%	5%	6%	2%	7%	13%	12%	7%

Consumers prefer using websites or email for simple customer service inquiries



Across all markets, when it comes to a simple inquiry such as locating a product or checking an account balance, consumers' preferred channel for reaching out to companies is via a company website or email – mentioned by three in ten or greater, with the exception of Mexico (23%) and India (21%). Consumers in Germany (44%) and the UK (41%) were most likely to agree.

Which of the following is your preferred channel for reaching out to companies for a *simple* inquiry [such as locating a product or checking an account balance]?

		*	3						*		•
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
Company website or email	38%	35%	23%	34%	29%	41%	44%	34%	37%	21%	35%
Speaking with a 'real' person on the phone	16%	17%	15%	20%	15%	16%	17%	15%	17%	14%	12%
Using an automated voice response system on the phone	12%	13%	18%	9%	11%	10%	10%	12%	10%	16%	19%
Face to face	11%	12%	10%	15%	15%	12%	9%	10%	11%	12%	4%
Online chat/instant messaging	9%	9%	13%	9%	9%	9%	6%	10%	8%	12%	9%
Text message	7%	6%	11%	7%	11%	7%	7%	12%	10%	15%	14%
Social networking site	7%	8%	12%	6%	10%	5%	7%	9%	7%	12%	7%

Consumers prefer speaking with a real person for a more complex customer service issue

For a more complex inquiry, such as returning a product or getting assistance with a product issue, consumers in all markets prefer speaking with a real person on the phone – mentioned by one third or greater in all markets except India (25%). In the US, Canada, Mexico, the UK, and Australia, the next preferred method is face-to-face; while in France, Italy, Germany, the Netherlands, India and Japan website/email is still preferred over face-to-face.

Which of the following is your preferred channel for reaching out to companies for a *more complex* inquiry [such as returning a product or getting assistance with a product issue]?

		*	3						*		
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
Speaking with a 'real' person on the phone	38%	35%	34%	41%	32%	38%	39%	39%	37%	25%	43%
Face to face	24%	31%	21%	15%	19%	24%	16%	15%	34%	15%	8%
Company website or email	15%	13%	12%	20%	22%	21%	26%	21%	14%	18%	23%
Online chat/instant messaging	10%	8%	12%	9%	8%	7%	6%	9%	6%	11%	8%
Using an automated voice response system on the phone	6%	4%	9%	6%	9%	3%	8%	6%	3%	12%	8%
Social networking site	3%	5%	7%	4%	7%	3%	4%	4%	4%	10%	5%
Text message	3%	5%	5%	6%	4%	3%	3%	5%	4%	9%	6%

Consumers demand a personal interaction for the most difficult or complicated customer service inquiries



When it comes to difficult or complicated inquiries such as making a complaint or disputing a charge, speaking with a real person either on the phone or face to face is preferred by most in all markets. Consumers in the US, UK, Netherlands, Italy, Germany, and Japan most prefer speaking with a real person on the phone, while those in Canada, Mexico, France and India most prefer face-to-face.

Which of the following is your preferred channel for reaching out to companies for a difficult or complicated inquiry [such as making a complaint or disputing a charge]?

		*	0						*		
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
Speaking with a 'real' person on the phone	46%	37%	26%	29%	32%	41%	37%	42%	40%	22%	47%
Face to face	30%	38%	46%	37%	31%	38%	36%	35%	40%	28%	31%
Company website or email	9%	9%	7%	13%	13%	11%	12%	11%	9%	13%	11%
Using an automated voice response system on the phone	5%	6%	9%	6%	7%	3%	6%	3%	4%	11%	3%
Text message	4%	3%	3%	4%	6%	2%	3%	2%	1%	8%	2%
Online chat/instant messaging	4%	4%	6%	6%	7%	3%	3%	4%	3%	9%	3%
Social networking site	3%	3%	3%	4%	5%	2%	3%	3%	3%	9%	3%

Consumers want polite, responsive and timely customer service



Consumers in the US, Canada, the UK, Australia, and Japan are most likely to switch brands due to a rude or unresponsive customer service representative. Those in Mexico and Italy are most likely to say that it is due to being shuffled from rep to rep with no resolution of their issue. French and Indian consumers are most likely to cite waiting too long to have an inquiry resolved.

Which of the following customer service issues would be most likely to influence you to switch brands or companies?

		*							*		
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
A rude or unresponsive customer service representative Being shuffled from representative to representative with no resolution of your issue	33%	31%	19%	13%	16%	30%	22%	20%	29%	20%	32%
	26%	26%	29%	22%	26%	24%	21%	21%	20%	17%	20%
Waiting too long to have an inquiry resolved	10%	9%	13%	26%	12%	10%	13%	12%	13%	22%	10%
Having to continue to follow up to check if your issue has been resolved	10%	10%	16%	7%	13%	12%	12%	16%	15%	14%	3%
Being pressured to purchase something	6%	8%	9%	10%	12%	9%	20%	11%	9%	7%	14%
Finding out company policies and pricing have changed without notification	6%	7%	8%	6%	11%	6%	6%	6%	6%	10%	5%
Being forced into one channel - and only being able to interact with customer service on the company's terms	5%	7%	5%	12%	6%	6%	4%	7%	6%	7%	5%
changed without notification Being forced into one channel - and only being able to interact with customer service on the	5%		5%	12%							

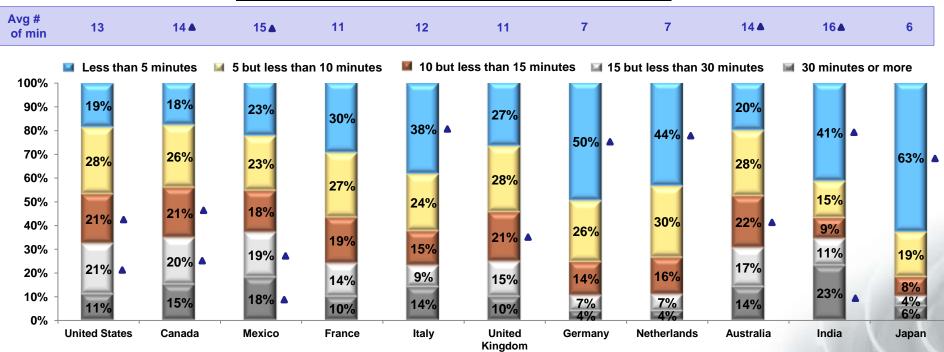
Q.N15 © echo Not Shown: 10% or less None of these

In most markets, consumers are willing to wait over 10 min on hold for customer service on average



When it comes to their willingness to wait on hold on the telephone for customer service, the most patient consumers, on average, are in India (16 minutes), Mexico (15 minutes), Canada and Australia (14 minutes, each). Consumers who are willing to wait the shortest amount of time, on average, are those in Japan (6 minutes), Germany and the Netherlands (7 minutes, each).

When you contact a customer service center by telephone, what is the maximum amount of time you are willing to wait on hold?





Most consumers do not see a change in the wait time for customer service on the phone

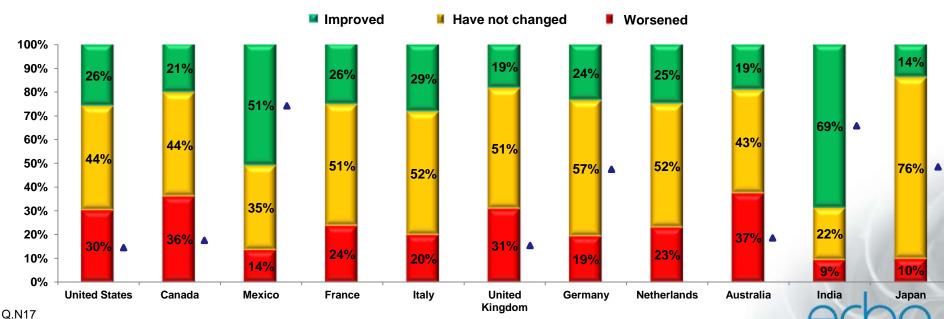


Consumers in India (69%) and Mexico (51%) are most likely to say that they have seen an improvement in the past year in the amount of time they are being left on hold during a typical customer service phone call.

Those in Australia (37%), Canada (35%), the UK (31%) and US (30%) are most likely to say that wait times for customer service on the phone have worsened in the past year.

Overall, most consumers believe the amount of time they are left on hold has not changed in the past year.

In the past year, do you believe that companies have generally improved or worsened in terms of the amount of time you feel you are being left on hold during a typical customer service phone call?

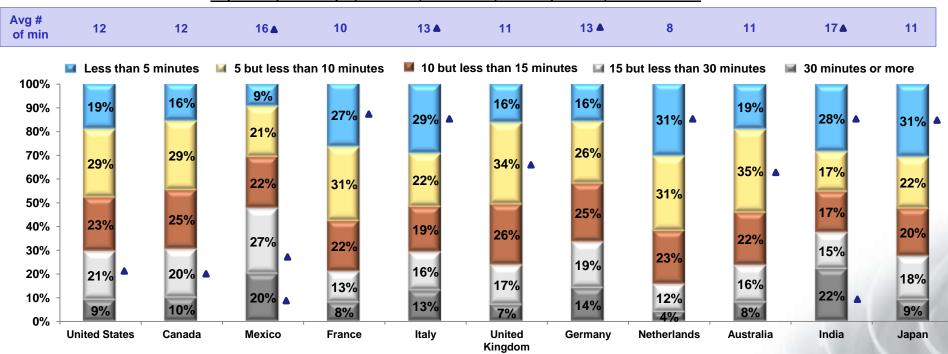


In most markets, consumers are willing to wait over 10 min for in-person customer service on average



When it comes to their willingness to wait for help from customer service in-person, the most patient consumers, on average, are in India (17 minutes), Mexico (16 minutes), Italy and Germany (13 minutes, each). Consumers who are willing to wait the shortest amount of time, on average, are those in the Netherlands (8 minutes).

In general, what is the maximum amount of time you are willing to wait for help from customer service in-person (for example, at a bank, retail store, service provider, or restaurant?





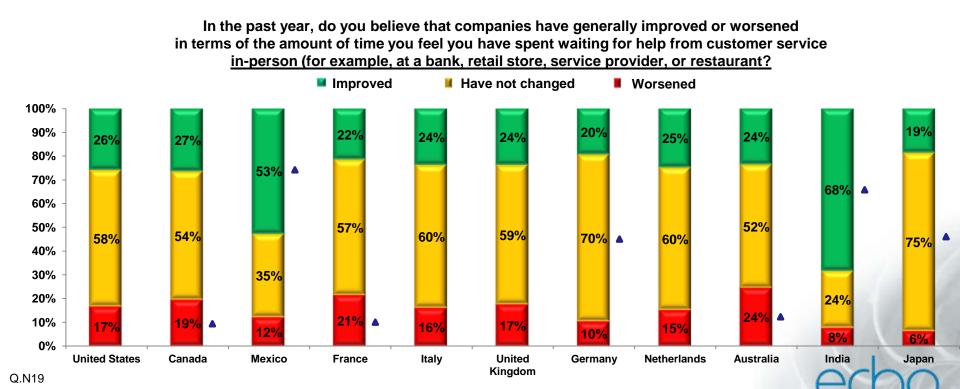
Most consumers do not see a change in the wait time for customer service in-person



Consumers in India (68%) and Mexico (53%) are most likely to say that they have seen an improvement in the past year in the amount of time they have to wait for customer service inperson.

Those in Australia (24%), France (21%) and Canada (19%) are most likely to say that wait times for customer service in-person have worsened in the past year.

Overall, most consumers believe the amount of time they wait for customer service in-person has not changed in the past year.



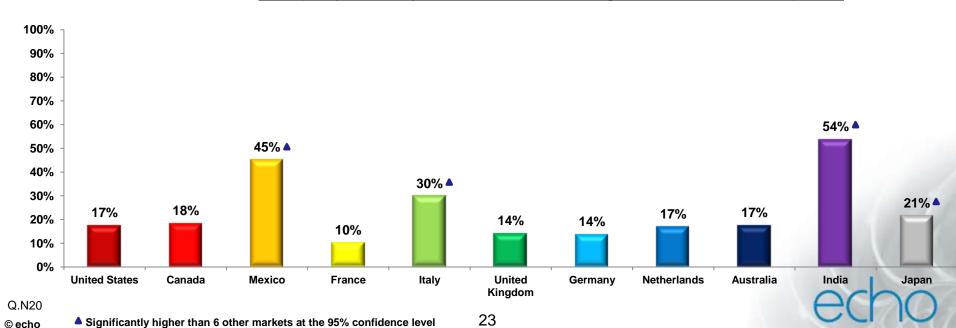
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In most markets, few consumers have used social media for customer service in the past year



Fewer than one in five consumers in most markets indicate that they have utilized social media at least once to get a customer service response in the past year – significantly more consumers in India (54%), Mexico (45%), Italy (30%) and Japan (21%) are likely to have done so. Consumers in France (10%) are the least likely to have done so.

In the past year, have you utilized social media to get a customer service response?



Consumers use social media for a variety of customer service activities



Consumers in the US and Germany are most likely to use social media to get an actual response to help with a service issue. Consumers in Mexico are most likely look to social media for recommendations about great service establishments. Those in the UK are more likely to use social media to vent frustration with a bad customer service experience. Consumers in India are most likely to ask questions of others via social media.

Which of the following are reasons you use social media when it comes to customer service?

		*	3						**		•
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
Seek an actual response from a company to help you with a service issue	50%	36%	42%	40%	37%	43%	50%	22%	37%	39%	15%
Praise a company for a great service experience	48%	35%	32%	22%	22%	37%	29%	29%	40%	40%	16%
Share information about your service experience with a broader audience	47%	38%	46%	27%	37%	43%	31%	22%	49%	50%	46%
Vent frustration with a bad customer service experience	46%	39%	22%	30%	21%	46%	31%	34%	34%	32%	16%
Ask questions of other users about how to get better service or have a better experience with a company	43%	28%	38%	23%	34%	31%	29%	16%	28%	46%	18%
Seek recommendations from others about great service establishments	35%	32%	53%	26%	37%	43%	29%	21%	34%	41%	32%
Praise an individual employee for providing a great service experience	33%	22%	20%	10%	14%	23%	14%	16%	19%	31%	10%

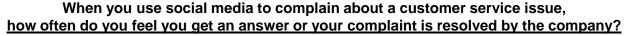
Q.N21 Respondents who have used social media to get a customer service response in past year © echo Significantly higher than 6 other markets at the 95% confidence level 24

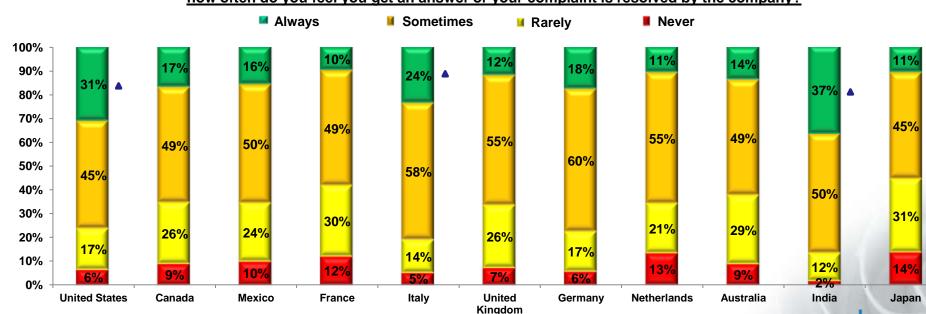
Not Shown: 6% or less None of these, except Netherlands (26%), Japan (18%) and Canada (12%)

Resolution of customer service issues via social media is spotty, with most getting answers only 'sometimes'



In most markets, fewer than one in five consumers who have used social media to complain about a customer service issue say that they always get an answer or have their complaint resolved. The exceptions being India (37%), the US (31%) and Italy (24%) where significantly more say their issues have always been resolved. Consumers in Japan (45%) and France (42%) are the most likely to say that their customer service issue is rarely or never resolved via social media.





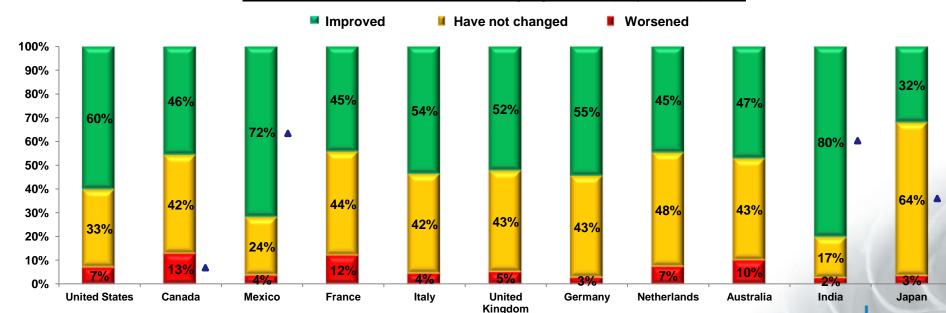
Q.N22 Respondents who have used social media to get a customer service response in past year



Most see improvement in the response time for customer service via social media

Nearly half of consumers or more who have used social media to get a customer service response see improvement in terms of how quickly they feel companies respond to general inquiries or complaints. Consumers in India (80%) and Mexico (72%) are most likely to say that companies have generally improved. Consumers in Canada are most likely to say that customer response via social media has worsened (13%).

In the past year, have companies generally improved or worsened in terms of how quickly you feel they respond to you over social media channels surrounding a general inquiry or complaint?



Q.N23 Respondents who have used social media to get a customer service response in past year

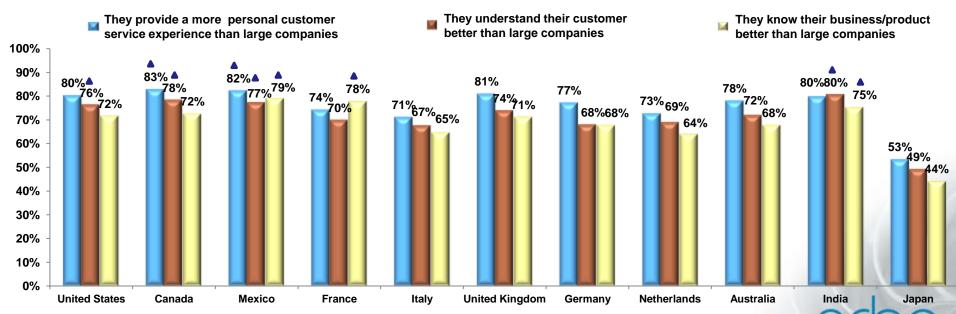
Consumers say small businesses provide more personal service and understand their business and customers better than large companies



Consumers in Canada (83%) and Mexico (82%) are most likely to agree that small businesses provide a more personal customer service experience than large companies. Consumers in India (80%), Canada (78%), Mexico (77%) and the US (76%) are most likely to agree that small businesses understand their customer better than large companies. Those in Mexico (79%), France (78%), and India (75%) are most likely to agree that small businesses know their business/product better than large companies.

Consumers in Japan are the least likely to agree that any of the statements accurately describe customer service in small businesses.

Based on your experience, how much do you agree or disagree that each of the following accurately describes customer service in small businesses?



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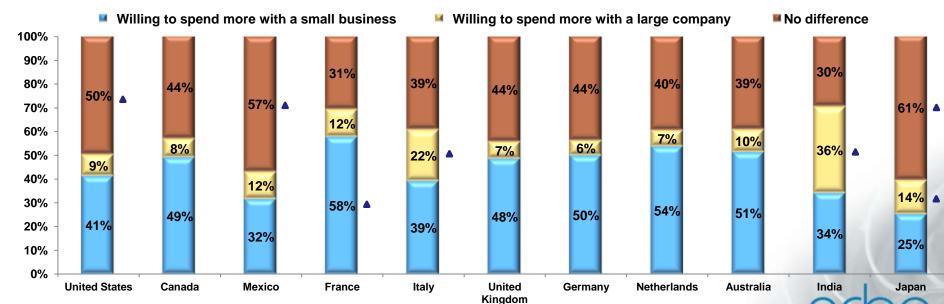
Many consumers willing to spend more for excellent service prefer small businesses to large companies



In most markets, two in five or greater who are willing to spend more with a company that provides excellent service are willing to spend more with a small business than a large company given they both provide excellent service. Consumers in France (58%) are the most likely to be willing to spend more with a small business than a large company.

Consumers in India (36%) are most likely to be willing to spend more with a large company compared to a small company. Consumers in Japan (61%), Mexico (57%) and the US (50%) are the most likely to say there is no difference in their willingness to spend more for excellent customer service.

Considering a small independently-owned business and large company that both provide excellent customer service - which type of company are you willing to spend more with?



Q.T5C Respondents willing to spend more with a company that provides excellent service

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Hospitality and Casual Dining industries rank highest in areas of customer service



Across markets with few exceptions, the hospitality and casual dining industries ranked highest in the customer service areas asked about. These industries scored particularly high in India, Mexico, the US, Canada and Italy.

Industries rated low on customer service areas in general in the Netherlands, Japan, Australia and the UK.

Industry Ranking Highest on Statement Describing Customer Service

		*	3						*		
	United States	Canada	Mexico	France	Italy	United Kingdom	Germany	Nether- lands	Australia	India	Japan
You have spent more with a company because of a history of positive customer service experiences	Casual Dining 63%	Casual Dining 63%	Hospitality / Casual Dining 82%	Casual Dining 46%	Casual Dining 55%	Casual Dining 56%	Casual Dining 55%	Casual Dining / Retail 39%	Casual Dining 57%	Hospitality 80%	Hospitality 31%
Have increased their focus on providing good customer service	Hospitality 53%	Hospitality 52%	Hospitality 85%	Hospitality / Casual Dining 45%	Hospitality 57%	Hospitality 45%	Casual Dining 56%	Casual Dining 38%	Hospitality 43%	Hospitality 81%	Hospitality 47%
Values your business and will go the extra mile for you	Hospitality 55%	Hospitality 55%	Hospitality 80%	Retail 50%	Hospitality 61%	Hospitality / Casual Dining 44%	Casual Dining 54%	Casual Dining 45%	Casual Dining 45%	Hospitality 75%	Hospitality 50%
Customer service exceeds your expectations	Hospitality 48%	Hospitality / Casual Dining 45%	Hospitality 77%	Luxury Brands 28%	Luxury Brands 44%	Hospitality / Casual Dining 37%	Casual Dining 38%	Hospitality / Casual Dining 29%	Hospitality 36%	Hospitality 72%	Hospitality 32%

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Significantly higher than 6 other markets for that

industry at the 95% confidence level