



# 2014 GLOBAL CUSTOMER SERVICE BAROMETER

COMPARISON OF FINDINGS ACROSS MARKETS



Data-driven insights

# Research Methods

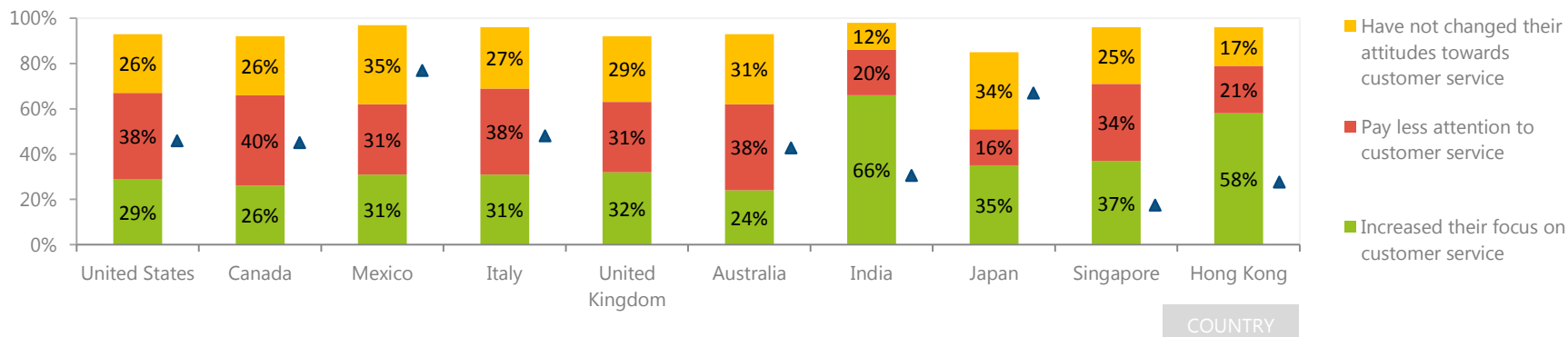
- This research was completed online among a random sample of consumers aged 18+ in:

U.S.	Canada	Mexico	Italy	U.K.	Australia	India	Japan	Singapore	Hong Kong
N=1,004	N=1,001	N=1,001	N=1,008	N=1,000	N=1,000	N=1,000	N=1,000	N=1,000	N=1,000

- Interviewing was conducted by Ebiquity during August, 2014.
- Overall the results in each market have a margin of error of +/- 3.1 percentage points at the 95% level of confidence.

# Consumers are divided in their views on whether companies are focusing on providing good service

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



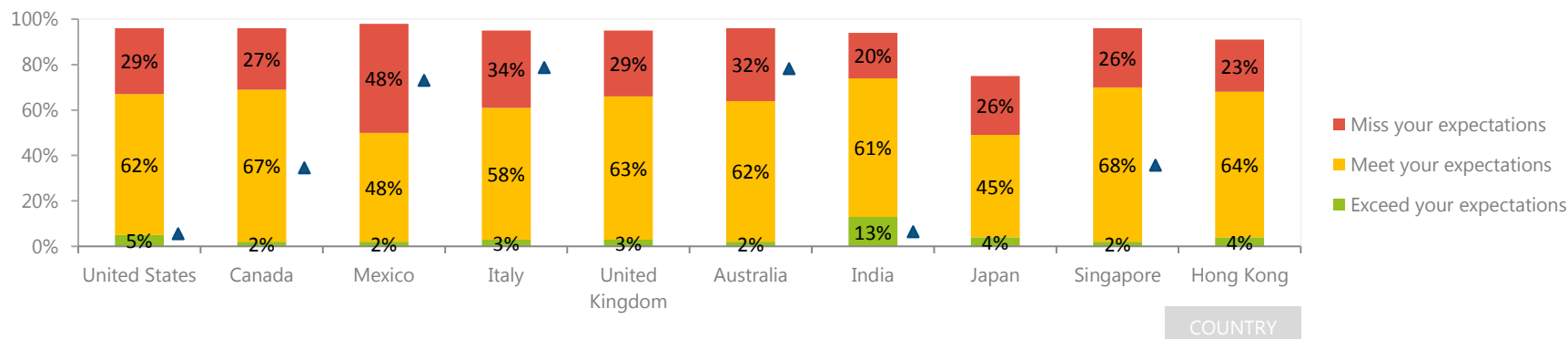
In most markets, one third or fewer consumers see an 'increased focus on customer service' on the part of businesses in the current economy. However, significantly more consumers in India (66%), Hong Kong (58%) and Singapore (37%) give businesses credit for making the extra effort.

In Canada (40%), Italy, Australia and the U.S. (38%, each) significantly more consumers think that companies are 'paying less attention to customer service' compared to other countries.

Consumers in Mexico (35%) and Japan (34%) are the most likely to say that businesses' 'attitudes towards customer service have not changed.'

# Businesses are either meeting or missing consumers' expectations for customer service

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



Roughly six to seven in ten consumers across all markets, except Mexico (48%) and Japan (45%), believe that companies generally 'meet their expectations' for customer service. However, about one-quarter of consumers in most markets believe that companies usually 'miss their expectations,' significantly higher in Mexico (48%), Italy (34%) and Australia (32%).

With the exception of India (13%), fewer than one in ten consumers across all markets believe that companies generally 'exceed their expectations' for customer service. Those in the U.S. (5%) are also more likely to think so.

# Delivering value and products that meet customers' needs will help companies exceed consumers' service expectations



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

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Deliver to me the promised value at the right price	29%	30%	19%	34%	28%	23%	22%	32%	20%	27%
Make it easy for me to do business with them online and off	22%	18%	11%	13%	19%	18%	14%	11%	12%	10%
Recognize me as an individual who deserves personalized service	21%	18%	23%	19%	21%	24%	16%	16%	22%	13%
Provide products & services that meet my needs as a customer	19%	22%	35%	20%	21%	23%	27%	30%	31%	31%
Make it easy for me to find information about their products & services	9%	12%	12%	14%	12%	12%	20%	11%	15%	19%

Delivering promised value at the right price is the best way for a company to stand out and exceed consumer expectations for customer service in half of the markets – significantly higher in Italy (34%) and Japan (32%). In the other half of the markets, three in ten or greater say providing products and services that meet their needs is the best way to stand out.

In Mexico (23%) and Australia (24%) in particular, consumers want companies to recognize them as an individual who deserves personalized service.



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# An excellent service experience for consumers means getting their questions answered by knowledgeable people



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

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Provide a satisfactory answer to your question	86%	82%	84%	73%	80%	81%	79%	66%	67%	60%
Connect you with someone who is knowledgeable	78%	74%	65%	62%	65%	66%	63%	41%	53%	28%
Provide personalized service	45%	46%	73%	38%	35%	43%	58%	27%	35%	29%
Thank you for being a customer	45%	43%	46%	21%	35%	34%	49%	40%	32%	18%
Follow up with you on your experience	27%	24%	62%	46%	25%	23%	53%	16%	35%	36%
Address you by your name	21%	17%	38%	9%	19%	19%	39%	19%	16%	14%
Try to sell you something	8%	2%	14%	5%	5%	5%	26%	17%	6%	7%

Across all markets, an excellent customer service experience means that representatives provide a satisfactory answer to consumers' questions. If representatives cannot provide an answer, it is important that they can connect consumers to someone who is knowledgeable. Consumers in Mexico (73%) and India (58%) are looking for personalized service. With the exception of India (26%), Japan (17%) and Mexico (14%), consumers do not think it is very important for representatives to try to sell them something to make it an excellent experience.

# Successful customer service professionals are efficient and empowered to handle requests



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

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
<b>Efficient</b> – Answers my questions or handles my transaction quickly	33%	34%	29%	27%	36%	33%	34%	12%	32%	40%
<b>Empowered</b> – Is able to handle my requests without transfers or escalations	29%	26%	21%	41%	23%	23%	18%	15%	21%	13%
<b>Courteous</b> – Is polite and cordial in addressing me	17%	14%	15%	10%	15%	14%	9%	26%	13%	26%
<b>Human</b> – Connects with me personally, shows empathy	14%	16%	15%	9%	19%	17%	17%	28%	17%	11%
<b>Consultative</b> – Gives me relevant information about my product or experience	7%	10%	21%	13%	8%	13%	22%	20%	18%	11%

In nearly all countries, consumers value efficiency – the ability to answer questions or handle transactions quickly – overall as an attribute of a successful customer service professional. Being empowered to handle requests without transfers or escalations is typically the second most important attribute.

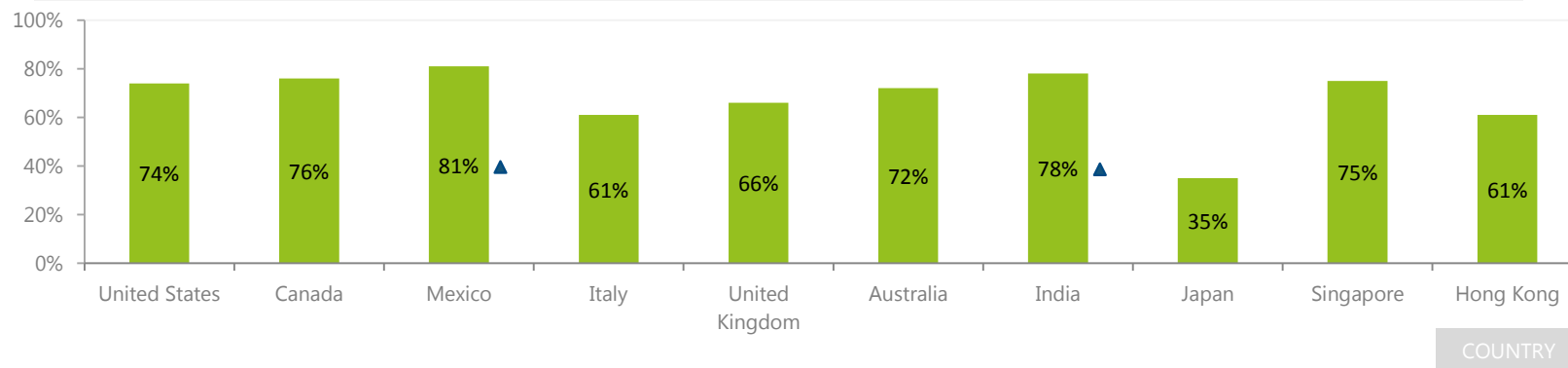
Consumers in Italy (41%) view empowered customer service professionals as the most successful. In Japan and Hong Kong, consumers value representatives who are courteous (26%, each) and connects with them personally (28% in Japan).



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# Providing good service pays off: consumers have spent more for customer service

HAVE YOU EVER SPENT MORE WITH A COMPANY BECAUSE OF A HISTORY OF GOOD CUSTOMER SERVICE EXPERIENCES?



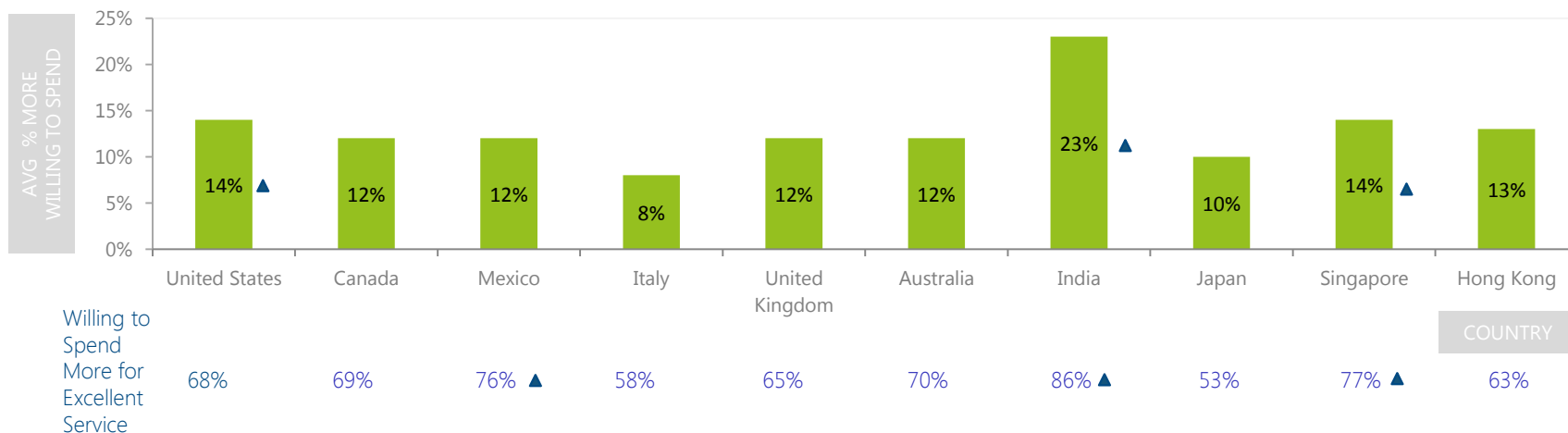
With the exception of Japan (35%), six-in-ten consumers or more have spent more with a company because of a history of positive customer service experiences.

Consumers in Mexico (81%) and India (78%) are most likely to have done so compared to those in other countries.



# Consumers will spend more with companies that provide excellent service

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

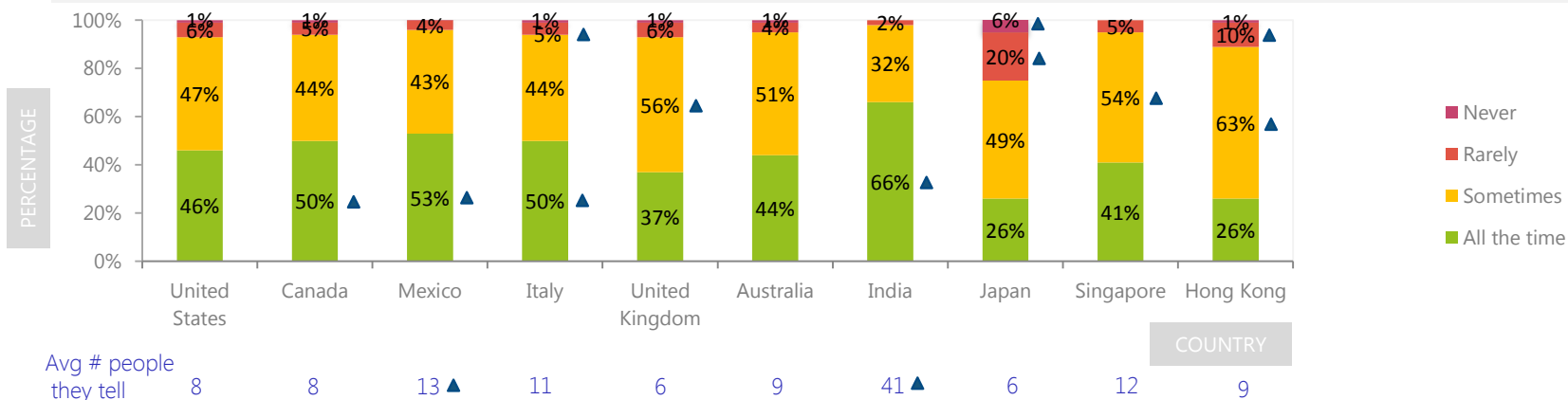


Across all markets, over half of consumers indicate that they are willing to spend more with companies that they believe provide excellent service – significantly more consumers in India (86%), Singapore (77%) and Mexico (76%) say they are willing to do so.

Consumers are willing to spend the most, on average, in India (23% more), the U.S. and Singapore (each 14% more).

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

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

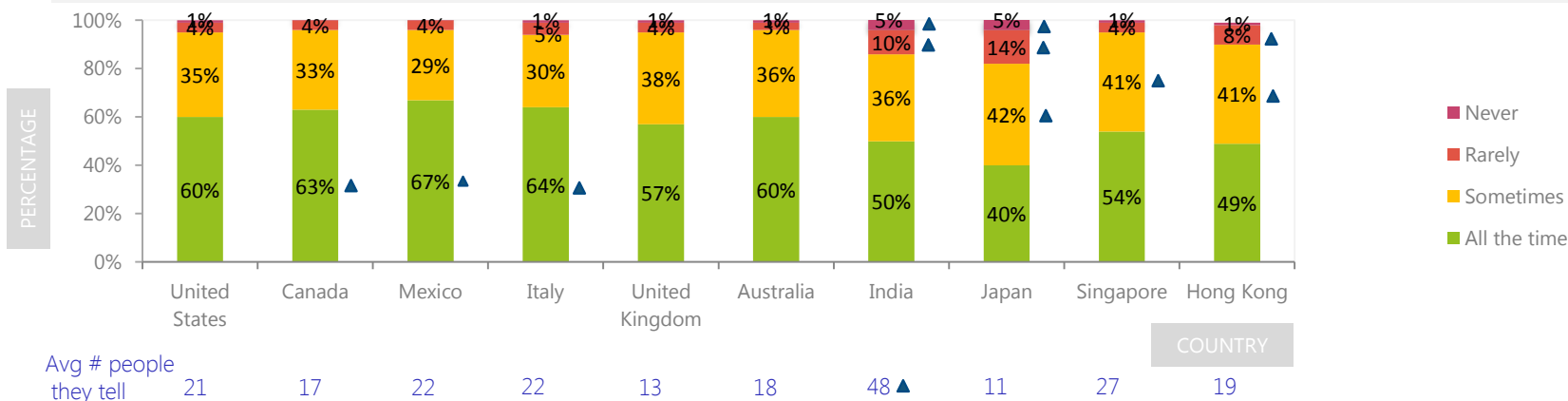


With the exception of Hong Kong, Japan (26%, each) and the U.K. (37%), greater than two in five consumers tell other people about their good customer service experiences all of the time.

Consumers in Japan are the least likely to tell others about their good service experience (26% rarely/never) and tell the fewest number of people (6 on average). On the other hand, consumers in India tell the most people (41 on average) about their good experiences, and do so most frequently (66% all the time). Consumers in Mexico also frequently talk about their good experiences (53% all the time, 13 people).

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

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



In nearly all countries, at least half of consumers, tell other people about their poor customer service experiences all of the time – with the exception of Japan (40%). Consumers in Mexico (67%), Italy (64%) and Canada (63%) do so most frequently.

With the exception of Mexico, Japan and India, on average consumers tell twice as many people about their poor experiences than their good experiences. Consumers in Japan are also the least likely to tell others about their poor service experience (19% rarely/never) and tell the fewest number of people (11 on average). While consumers in India tell the most people (48 on average) about their poor experiences.

# Consumers use a variety of channels for telling others about their customer service experiences



HOW OFTEN DO YOU USE EACH OF THE FOLLOWING CHANNELS OF COMMUNICATION TO TELL PEOPLE ABOUT YOUR CUSTOMER SERVICE EXPERIENCES? (All the time / Sometimes)

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Face-to-face	91%	94%	91%	93%	90%	92%	92%	77%	91%	86%
Company website	50%	43%	52%	45%	45%	39%	74%	30%	48%	43%
Text message / SMS	49%	41%	45%	50%	42%	44%	73%	28%	64%	56%
Social network sites (Twitter, Facebook, etc.)	46%	43%	73%	60%	42%	45%	83%	35%	66%	72%
Consumer review websites (Yelp, etc.)	46%	36%	43%	53%	41%	32%	74%	32%	52%	51%
Online chat / instant messaging	34%	31%	68%	54%	34%	32%	81%	20%	68%	72%
Blog	17%	11%	31%	36%	14%	12%	60%	23%	32%	42%

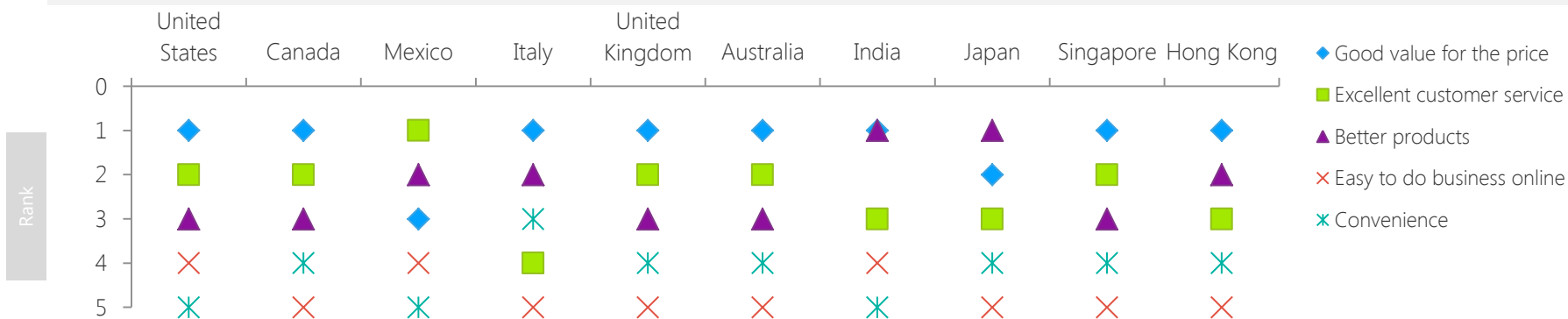
Across all countries, consumers most frequently tell others about their customer service experiences face-to-face. Consumers in India (83%), Mexico (73%), Hong Kong (72%), Singapore (66%) and Italy (60%) are the most likely to make use of social network sites to discuss their experiences with others. Consumers in India (73%), Italy (53%), Singapore (52%) and Hong Kong (51%) are the most likely to share their experiences via consumer review websites.



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# Value, service and products are most likely to influence consumers to choose a company

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



Eight out of ten countries, rank 'good value for the price' as the #1 most important factor when choosing a company with which to do business – with 'excellent customer service' ranked #2 in half of the markets. In Japan offering 'better products' was ranked #1 and in India it was tied with 'good value'. Only Italy ranked 'excellent customer service' behind convenience.

# Recommendations and reputation are most likely to get consumers to do business with a company



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

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Recommendations from a friend or family member	42%	44%	28%	28%	44%	45%	22%	20%	35%	24%
A sale or promotion	34%	34%	25%	35%	25%	29%	12%	17%	26%	36%
A company's reputation	15%	15%	32%	20%	19%	15%	33%	29%	22%	25%
An online or social media review	5%	3%	5%	11%	5%	3%	15%	19%	9%	6%
An interesting advertisement	3%	3%	8%	4%	3%	5%	11%	7%	4%	4%
An engaging website	2%	1%	4%	3%	4%	3%	6%	8%	4%	6%

In half of the markets – Australia (45%), Canada, the U.K. (44%, each) and the U.S. (42%) and Singapore (35%) – consumers say recommendations from a friend or family member are most likely to get them to try to do business with a new company. In Hong Kong (36%) and Italy (35%), a sale or promotion is the best motivator. Consumers in India (33%), Mexico (32%) and Japan (29%) rely on a company's reputation when deciding to do business with a new company.

# Consumers prefer using websites or email for simple customer service inquiries

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]?

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Company website or email	36%	36%	20%	23%	42%	39%	18%	35%	26%	22%
Speaking with a 'real' person on the phone	14%	17%	15%	13%	15%	20%	12%	11%	13%	11%
Using an automated voice response system on the phone	12%	10%	14%	11%	11%	9%	11%	15%	12%	15%
Face to face	9%	13%	10%	10%	10%	12%	13%	6%	7%	8%
Online chat/instant messaging	9%	7%	11%	10%	9%	10%	11%	10%	11%	12%
Smartphone app	9%	8%	11%	14%	-	-	12%	8%	16%	16%
Text message	6%	6%	7%	9%	7%	6%	10%	10%	9%	7%
Social networking site	5%	4%	13%	10%	6%	5%	14%	6%	7%	10%

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 one in five greater. Consumers in the U.K. (42%), Australia (39%), the U.S., Canada (36%, each) and Japan (35%) were most likely to agree.

# Consumers prefer speaking with a real person on the phone for a more complex customer service issue

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]?

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Company website or email	17%	13%	11%	18%	20%	14%	13%	26%	18%	14%
Speaking with a 'real' person on the phone	37%	35%	32%	29%	37%	39%	25%	37%	35%	35%
Using an automated voice response system on the phone	5%	4%	10%	7%	5%	3%	10%	7%	6%	8%
Face to face	19%	30%	18%	15%	21%	31%	13%	10%	16%	15%
Online chat/instant messaging	12%	9%	12%	12%	12%	7%	12%	6%	11%	10%
Smartphone app	3%	2%	7%	7%	-	-	9%	3%	5%	5%
Text message	3%	3%	3%	6%	3%	4%	9%	6%	5%	5%
Social networking site	4%	4%	8%	7%	3%	3%	11%	5%	5%	8%

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 Italy (29%) and India (25%). In the US, Canada, Mexico, the UK, Australia and Hong Kong the next preferred method is face-to-face; while in Italy, Japan and Singapore website/email is still preferred over face-to-face.



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



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)?

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Company website or email	10%	8%	7%	11%	13%	8%	13%	13%	13%	7%
Speaking with a 'real' person on the phone	48%	45%	26%	33%	46%	41%	22%	41%	33%	31%
Using an automated voice response system on the phone	5%	4%	7%	7%	3%	3%	12%	4%	6%	6%
Face to face	24%	30%	41%	26%	29%	38%	21%	31%	35%	36%
Online chat/instant messaging	4%	5%	6%	7%	5%	5%	8%	3%	3%	5%
Smartphone app	3%	3%	5%	4%	-	-	8%	2%	2%	5%
Text message	2%	3%	4%	4%	3%	2%	7%	3%	4%	5%
Social networking site	3%	3%	5%	7%	3%	3%	9%	3%	4%	5%

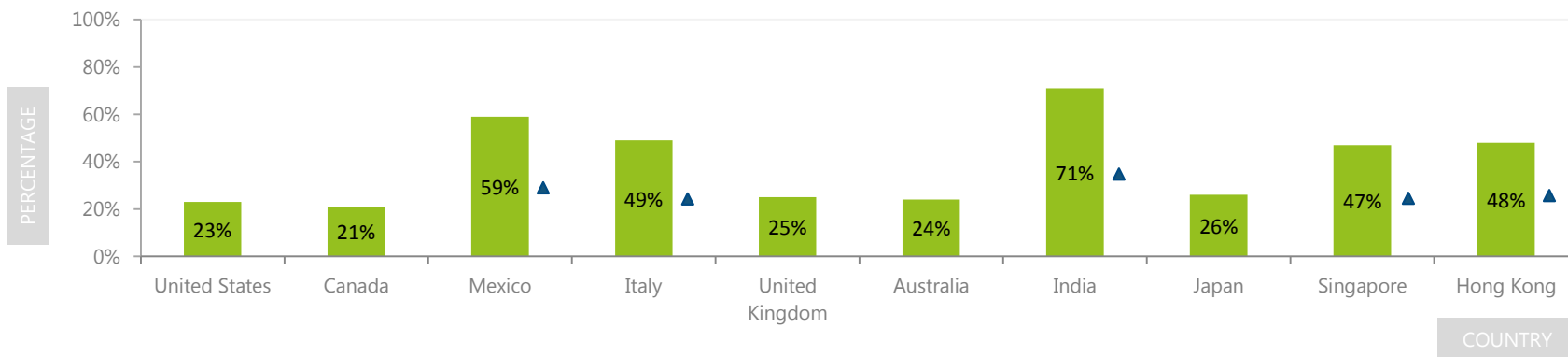
When it comes to difficult or complicated inquiries such as making a complaint or disputing a charge, speaking with a real person either on the phone or face to face is preferred by most in all markets. Consumers in the U.S., Canada, Italy, the U.K., Australia, India and Japan most prefer speaking with a real person on the phone, while those in Mexico, Singapore and Hong Kong most prefer face-to-face.



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# Consumers divided on their use of social media for customer service in the past year

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



In half of the markets, one-quarter of consumers or fewer utilized social media to get a customer service response. However, in the other half of the markets, one-half to seven-in-ten consumers have done so. The use of social media for customer service is particularly prevalent in India (71%) and Mexico (59%).

# Consumers use social media for a variety of customer service activities



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

	United States	Canada	Mexico	Italy	United Kingdom	Australia	India	Japan	Singapore	Hong Kong
Praise a company for a great service experience	53%	43%	33%	25%	45%	38%	47%	20%	38%	26%
Vent frustration with a bad customer service experience	50%	51%	31%	27%	43%	49%	32%	18%	40%	26%
Share information about your service experience with a broader audience	46%	43%	48%	36%	47%	41%	57%	39%	50%	31%
Seek an actual response from a company to help you with a service issue	40%	51%	43%	44%	47%	49%	46%	21%	49%	45%
Seek recommendations from others about great service establishments	36%	32%	46%	34%	26%	31%	44%	32%	34%	28%
Praise an individual employee for providing a great service experience	35%	31%	22%	15%	22%	27%	34%	13%	28%	17%
Ask questions of other users about how to get better service or have a better experience with a company	34%	32%	39%	37%	28%	27%	55%	20%	36%	33%

Consumers in the US are most likely to use social media to praise a company for a great service experience. On the other hand, when compared with other markets, consumers in the US and Canada are most likely to use social media to vent frustration with a bad customer service experience. Consumers in India are most likely to share information about their service experience with a broader audience and seek out others' advice on getting better service.

Q.15

Significantly higher than 5 other markets at the 95% confidence level

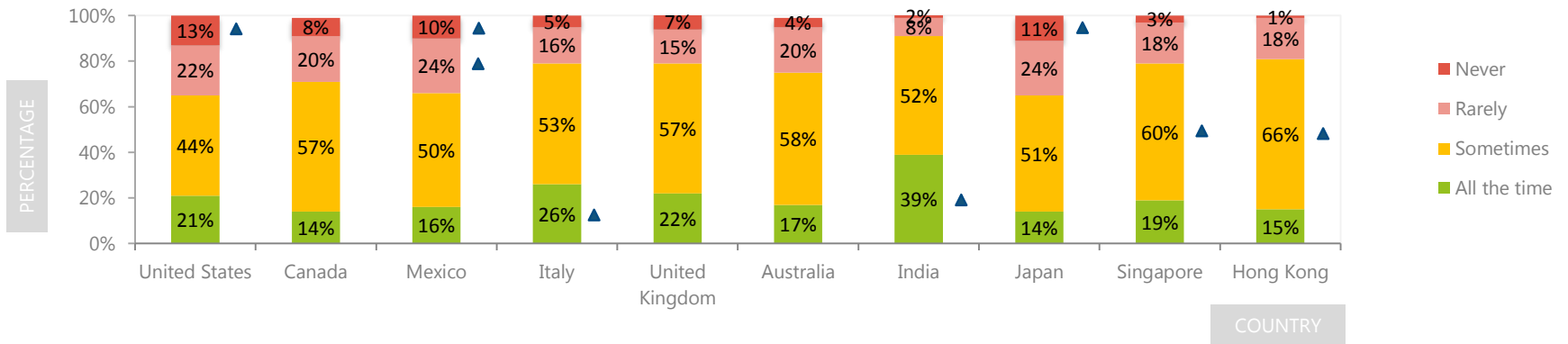
Not Shown: 6% or less None of these, except US (8%) and Japan (14%)



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

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?



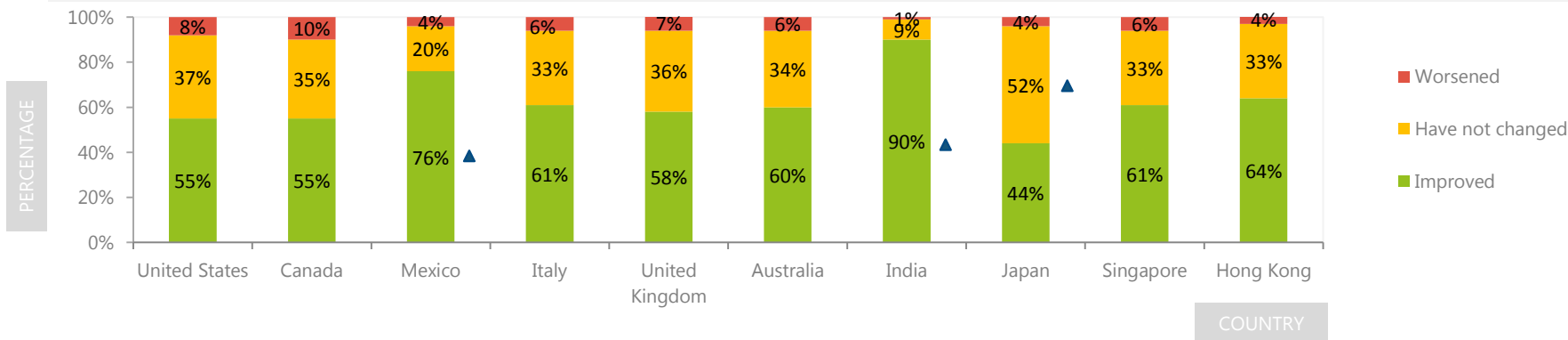
In eight of the ten markets, roughly one in five consumers or fewer who have used social media to complain about a customer service issue say that they always get an answer or have their complaint resolved. The exceptions being India (39%) and Italy (26%) where significantly more say their issues have always been resolved. Consumers in the U.S., Japan (35%, each) and Mexico (34%) are the most likely to say that their customer service issue is rarely or never resolved via social media.

Q.16 Respondents who have used social media to get a customer service response in past year

▲ Significantly higher than 5 other markets at the 95% confidence level

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

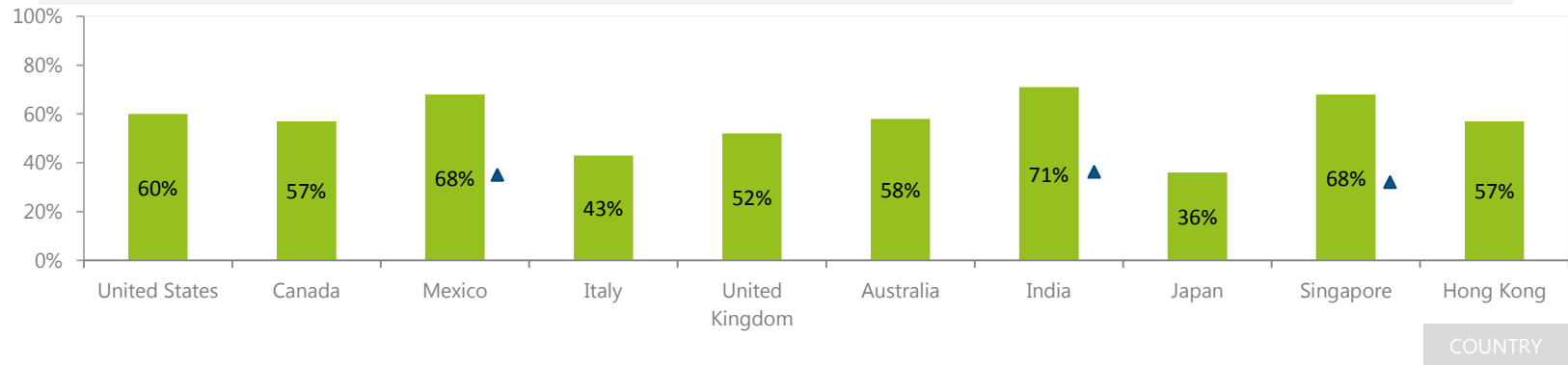
WHEN YOU USE SOCIAL MEDIA TO COMPLAIN ABOUT A CUSTOMER SERVICE ISSUE, HOW OFTEN DO YOU FEEL YOU GET AN ANSWER OR YOUR COMPLAINT IS RESOLVED BY THE COMPANY?



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 – with the exception of Japan (44%). Consumers in India (90%) and Mexico (76%) are most likely to say that companies have generally improved.

# Poor service leads to lost sales

IN THE PAST YEAR, HAVE YOU NOT COMPLETED A BUSINESS TRANSACTION OR MADE AN INTENDED PURCHASE BECAUSE OF POOR CUSTOMER SERVICE?

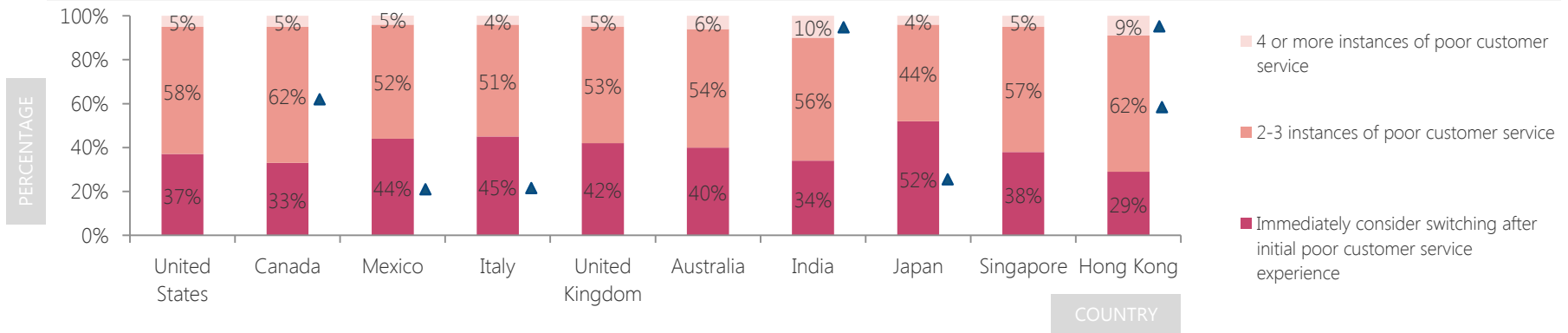


In the past year, half of consumers or more in most markets indicate that they have not completed a transaction or made an intended purchase because of poor customers service – significantly more consumers in India (71%), Mexico (68%) and Singapore (68%) are most likely to agree. Significantly fewer consumers in Japan (36%) and Italy (43%) have done so.

# Consumers are generally willing to give companies a second chance after a poor service experience



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

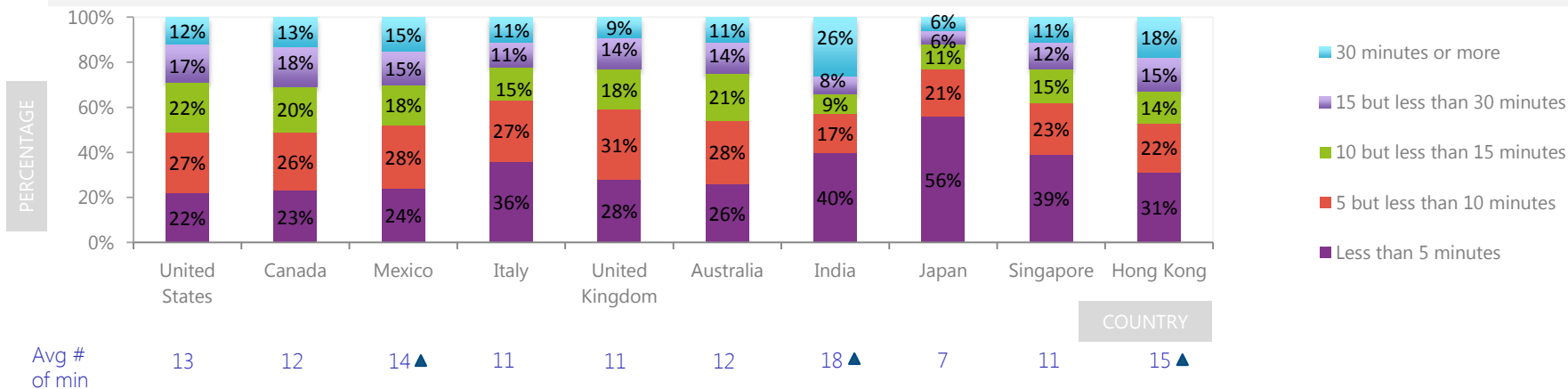


While most consumers are willing to give companies another chance after a poor service experience, one-third to one-half state that they immediately consider switching after an initial poor customer service experience.

In Japan (52%), Italy (45%) and Mexico (44%) the highest proportion of consumers say that companies do not get a second chance to make a good impression when it comes to customer service.

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

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

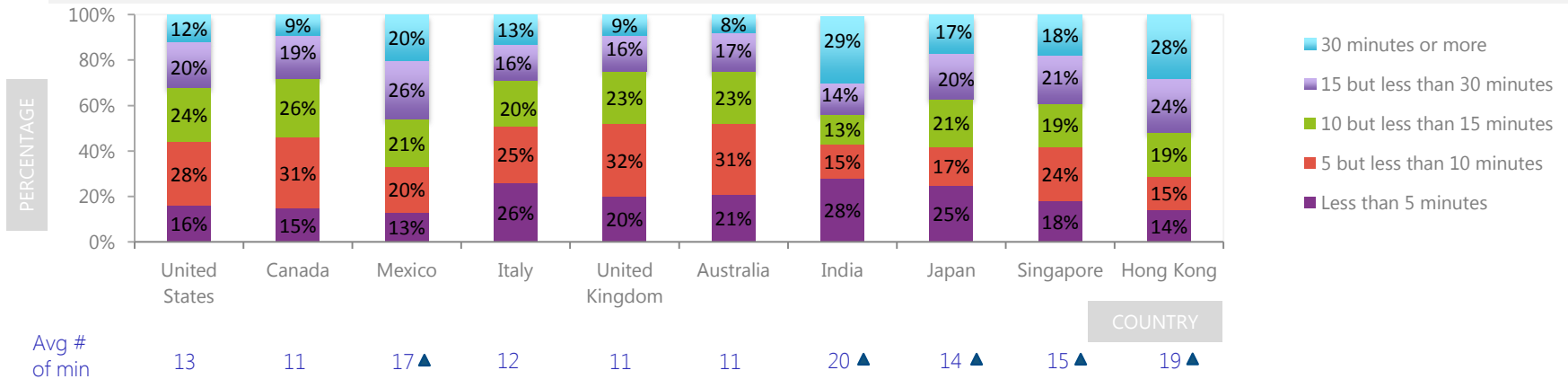


When it comes to their willingness to wait on hold on the telephone for customer service, the most patient consumers, on average, are in India (18 minutes), Hong Kong (15 minutes), and Mexico (14 minutes). Consumers in Japan are willing to wait the shortest amount of time, on average (7 minutes).



# Consumers are more patient when waiting for customer service help in-person

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



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 (20 minutes), Hong Kong (19 minutes), Mexico (17 minutes), Singapore (15 minutes) and Japan (14 minutes).

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