THE CONSUMER'S

PERSPECTIVE

Exploring Multi-Channel Customer Care

Customer Experience Management Benchmark Series

2015 Consumer Edition, Published September 27, 2015

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PREFACE

The 2015 Consumer Edition of the Customer Experience Management Benchmark (CXMB) Series, *The Consumer's Perspective: Exploring Multi-Channel Customer Care,* marks the sixth issue of the run. This year's report is special in that it is the first of the Consumer Edition reports to provide a consistent set of year-over-year data points. By carefully trending these data points, this year's report reveals compelling insights into key areas of consumer expectation, opinion and experience.

The study's research was spread across 22 separate survey modules, with a total of 93 different questions. Results were gathered between June 3 and August 13, 2015.

This year's report also benefitted greatly from the introduction of a new research partnership with COPC Inc. As a global leader in the customer experience industry, COPC Inc.'s expertise has been instrumental in the evolution of this year's report. In addition to opening new avenues of discovery, COPC Inc. played a critical role in cultivating many of the specific insights that were extracted from this year's data set.

As in previous editions, this year's report is divided into two primary sections: general findings (framed this year as "The Customer Care Experience" and "Opinions Regarding Customer Care") and channel-specific findings. We continue to subdivide and describe the individual channels of care in the following way:

Care channels were defined to survey participants in the following way:	**Traditional Care** — Phone, Email, In-Person and Mail **Interactive Care** — Online/Video Chat, FAQ, Self-Help **Social Media Care** — Twitter, Facebook, Forums, etc. **Mobile Care** — Mobile Apps, Text/SMS, Mobile Chat

Unlike previous years, we made a deliberate effort to no longer refer to Interactive, Social Media and Mobile Care as "emerging channels." Instead, we refer to them simply as "alternative" channels. The reason for this is we feel these channels have established themselves as mainstream, and are an essential part of a integral customer care program.

As always, we hope this year's report has the power to inform, inspire and transform.

A NOTE FROM THE STUDY'S AUTHORS

It is with great pleasure that we bring you the 2015 Consumer Edition of the Customer Experience Management Benchmark (CXMB) Series. We trust that this series will continue to fuel compelling conversations and introspection both at organizations like yours and within the broader customer experience community.

This year, we offer special thanks to our corporate commentary contributor: Aaron McMillan of United Airlines. We truly appreciate Mr. McMillan taking the time to provide a glimpse into the customer care groups of his organization, as well as share his personal experiences and perspectives on the themes that have emerged from this year's results. We encourage you to review his valuable insights.

As always, we invite you to share these results with your colleagues and industry counterparts. Should a particular area or result within this report be of special interest to you or your organization, please don't hesitate to reach out — we will make every effort to expand our research in future releases of this report. The same can also be said if there is a particular area or angle which we've neglected to cover. At the end of the day, our objective with this series of reports is simple: to provide insights and information into the topics that matter most to you, our readers.

Regards,

— Execs In The Know & COPC Inc.

We need your help!

The CXMB Series report is published bi-annually, with the Consumer Edition representing one half of this schedule. The other half is composed of the Corporate Edition, published each year in late winter.

Each fall, we survey customer care professionals across a wide range of industries. Not only do we want to use this opportunity to thank past participants, we encourage you to participate in this endeavor.

For more information on how you can contribute, visit the Execs In The Know website at ExecsInTheKnow.com.

THE FINDINGS

THE CUSTOMER CARE EXPERIENCE

What customer service channels and solutions are consumers utilizing, and why? Which industries are consumers interacting with most? How does the multi-channel approach impact the consumer, and what is happening when the customer care journey goes astray? This section explores the answers to these and other questions.

- USAGE AND OUTCOMES
- THE MULTI-CHANNEL JOURNEY
- THE UNHAPPY CONSUMER

THE CUSTOMER CARE EXPERIENCE
Usage and Outcomes

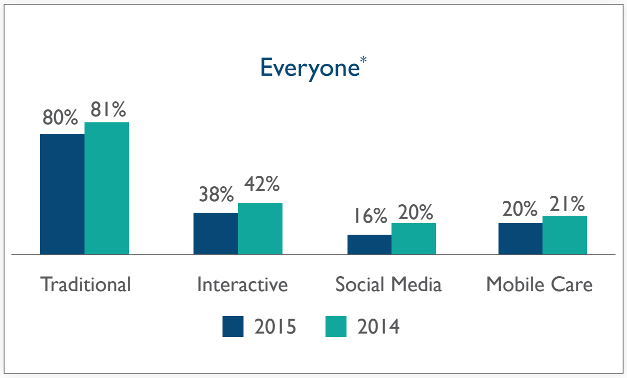
CARE CHANNEL USE

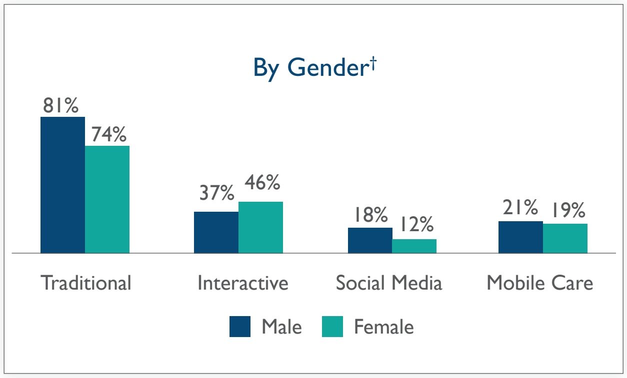
The results of channel use among consumers (with at least one customer care interaction in the previous 12 months) closely aligned with findings from the 2014 CXMB Study. There was a slight indication of less overall exposure to Interactive and Social Media Care. Channel mix remained unchanged with Traditional Care leading the pack, followed by Interactive Care at a distant second.

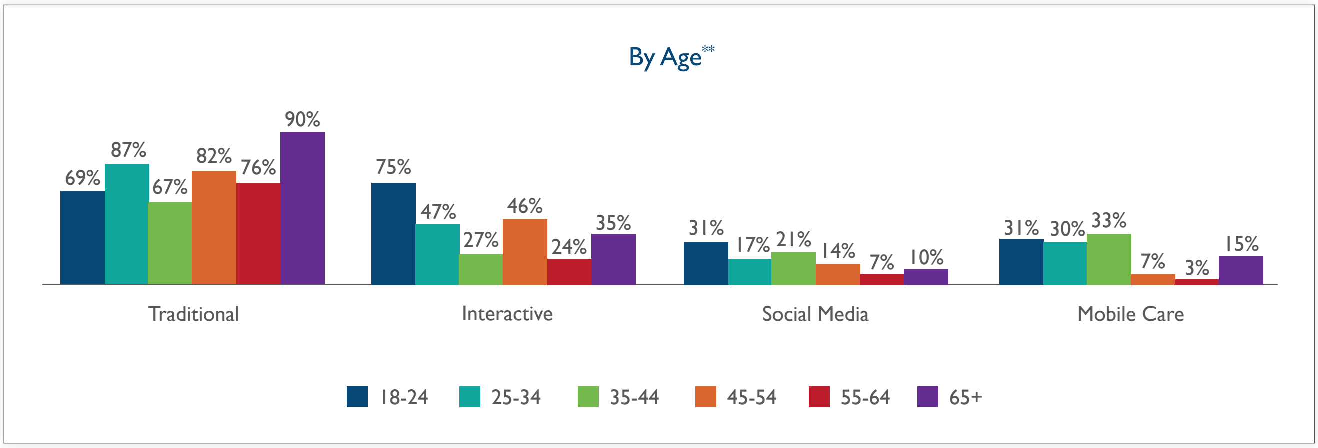
When examining the interior demographics of these results, we discovered a few notables: 1) Men are more likely users of Traditional and Social Media Care, whereas a greater percentage of women gravitate toward Interactive Care; 2) Mobile Care use was concentrated in ages 18–44 years; and 3) The 18–24 age group is the only cohort that has a higher rate of use within an alternative channel (Interactive Care at 75%) than the Traditional Care channel (at 69%).

Channel Use Among Individuals with at Least One Customer Care Interaction in the Previous 12 Months:

Within the past 12 months, which contact channel(s) have you used to engage with a brand's customer service department? (Select all that apply)





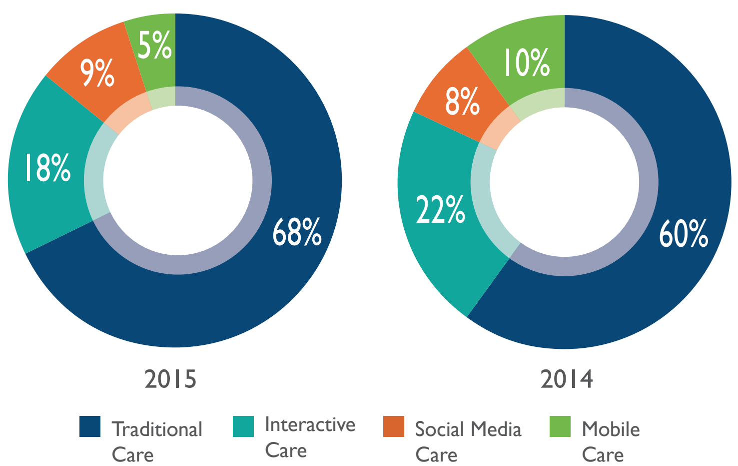


*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 207 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 161 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 156 online responses. Sample: National Adult Internet Population.

CHANNELS MOST USED AND CHANNEL SOLUTION USE

Traditional Care (more precisely, Phone) continues to dominate the customer care landscape. As a single channel and a specific channel solution, both Traditional Care and Phone made notable gains in 2015 when looking specifically at the question of "most frequent use." Also worth noting: Social Media and Mobile Care continue to maintain strongholds among younger generations in 2015, with 21% of 25- to 34-year-olds naming Social Media Care as their most used channel and 18% of 18- to 24-year-olds naming Mobile Care as their most used channel.

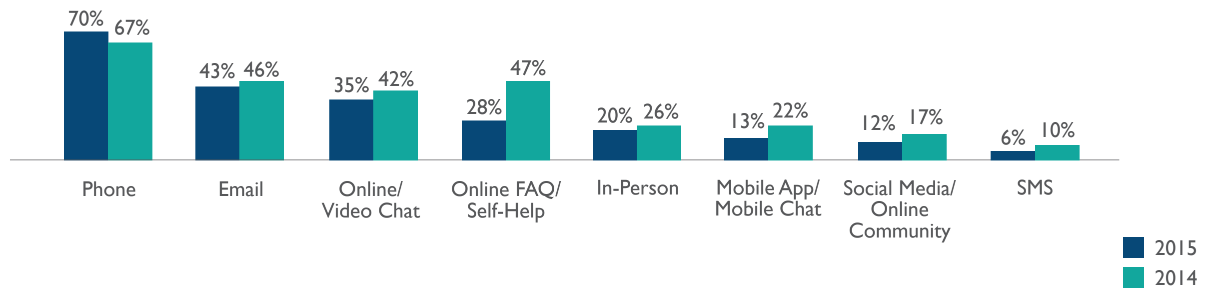
Within the past 12 months, which customer service contact channel have you used the most frequently?*



When we asked consumers to name their most frequently used contact channel, Traditional Care moved 8% in 2015, a 13% increase year over year. Interactive and Mobile Care both decreased, with Mobile Care experiencing a 50% decline. These findings reinforce similar 2015 CXMB results that suggest increasing strength and importance for the Traditional Care channel.

We asked 191 users of customer care to identify all the different channel solutions they used in the previous 12 months. With the exception of Phone, results indicated a decline in solution utilization across the board. The channels most impacted were Mobile and Interactive Care. Since these results are not indicators of volume or frequency of use, it's unclear whether they indicate an overall decline in customer care use. However, the results seem to suggest comparative strength within Traditional Care. Program strategists should take a close look at what these implications might mean within their own organizations.

Within the past 12 months, which method(s) have you used to engage with a brand's customer service department? (Select all that apply)*

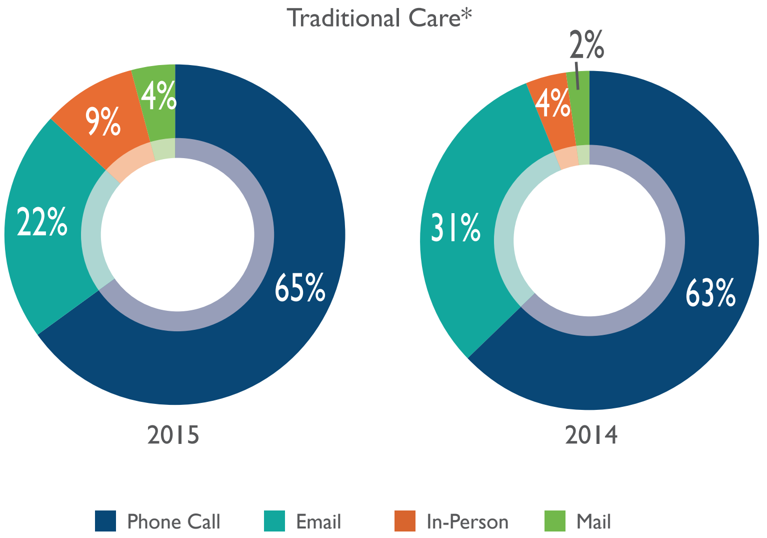


*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

MOST-USED CHANNEL SOLUTIONS: TRADITIONAL AND INTERACTIVE

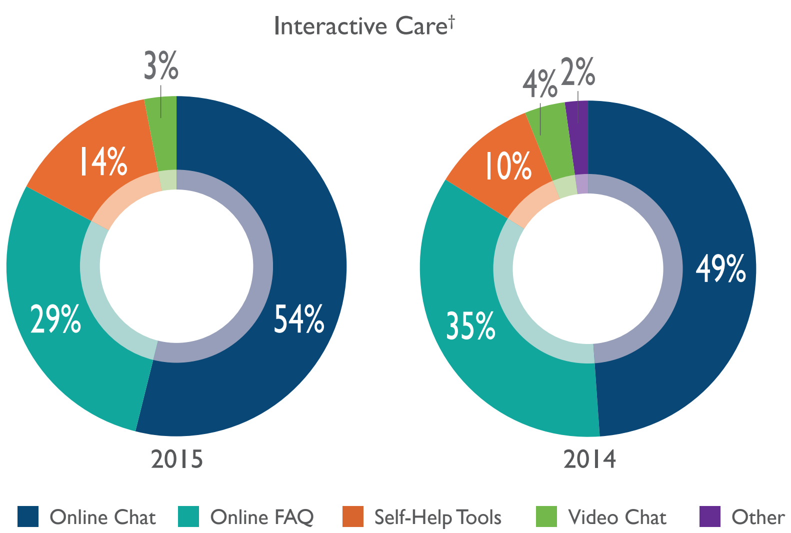
Like last year, we wanted to understand which channel solutions were most often used by consumers within the individual channels of care. Respondents for each of the four following questions are qualified as actual users of the channel in question, resulting in a clear picture of solution use. We carefully analyzed this year's results in comparison to last year's, highlighting changes of significance where applicable.

Within the past 12 months, which Traditional customer care solution have you used the most to connect with a brand's customer service department?



The most significant change in Traditional Care use came in regards to Email. In 2014, 31% of Traditional Care users named "Email" as their most used channel solution. In 2015, that number fell by 30%, coming in at 22%. Email use remains highest in rural communities (30%) and among those ages 35-44 years (29%). For businesses hoping to curb email use, they'll need to find ways to move these interactions into channel solutions that lend themselves well to written correspondence, such as SMS/text or social media engagement.

Within the past 12 months, which specific Interactive channel have you used the most to connect with a brand and/or customer service department?



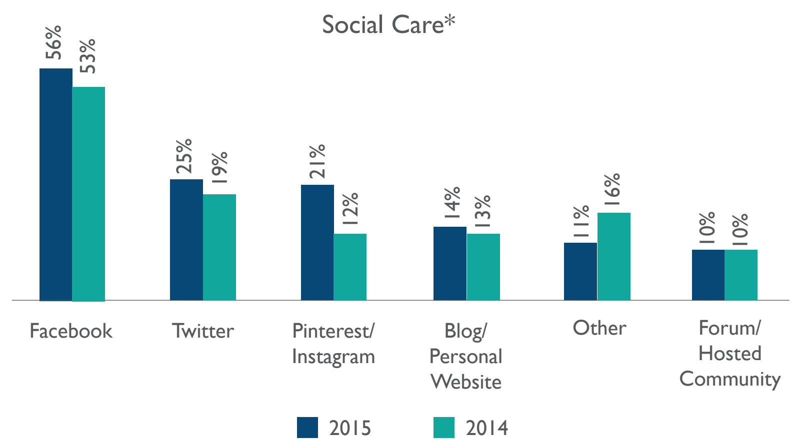
Use of Online Chat continues to grow with strong representation across demographics, particularly in those ages 65+ years (67%) and those ages 35–44 years (63%). Use of Self-Help tools also saw a 40% year-over-year growth, moving from 10% to 14%. At the same time, Online Chat saw a 10% upward climb, while Online FAQ use fell by 17%, from 35% in 2014 to 29% in 2015. If businesses hope to shift traffic in one direction or the other, they should seek to understand the different advantages and disadvantages of these solutions from the consumer's perspective.

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.

MOST USED CHANNEL SOLUTIONS: SOCIAL MEDIA AND MOBILE

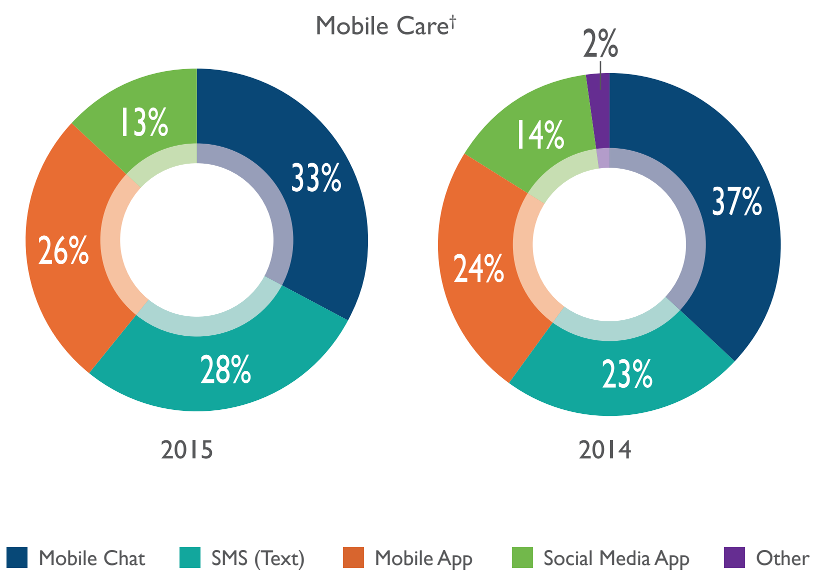
Like the Traditional and Interactive Care findings on the previous page, the Social Media and Mobile Care results below target qualified users of each respective channel of care. One caveat: the Social Media Care findings reflect total participation rather than the community of most use. This is consistent with the methodology used in last year's survey, and provides readers with an understanding of community participation trends.

Within the past 12 months, in which social media communities have you had an interaction with a brand and/or customer service department? (Select all that apply)



Facebook continues to be the most popular community for customer care interaction, but the biggest gainers over the past year were Pinterest/Instagram and, to a lesser extent, Twitter. Pinterest/Instagram saw a remarkable 75% gain in use, moving from 12% use in 2014 to 21% use in 2015. At the same time, Twitter use increased 32%, moving from 19% use in 2014 to 25% use in 2015. Since social media evolves quickly, businesses need to be aware of what is up-and-coming, as well as understand how they can participate.

Within the past 12 months, which Mobile Care solutions have you used the most to connect with a brand's customer service department?



SMS (Text) saw a 22% gain in its year-over-year use rate, moving from 23% in 2014 to 28% in 2015. Conversely, Mobile Chat use saw a year-over-year decline of 11%, moving from 37% in 2014 to 33% in 2015. Furthermore, Mobile App use saw a slight bump. Mobile Chat use continues to remain strong among women (42% use rate), while Social Media App use peaks in those ages 18–34 years (16% use rate).

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 212 online responses. Sample: National Adult Internet Population.

THE CUSTOMER CARE EXPERIENCE

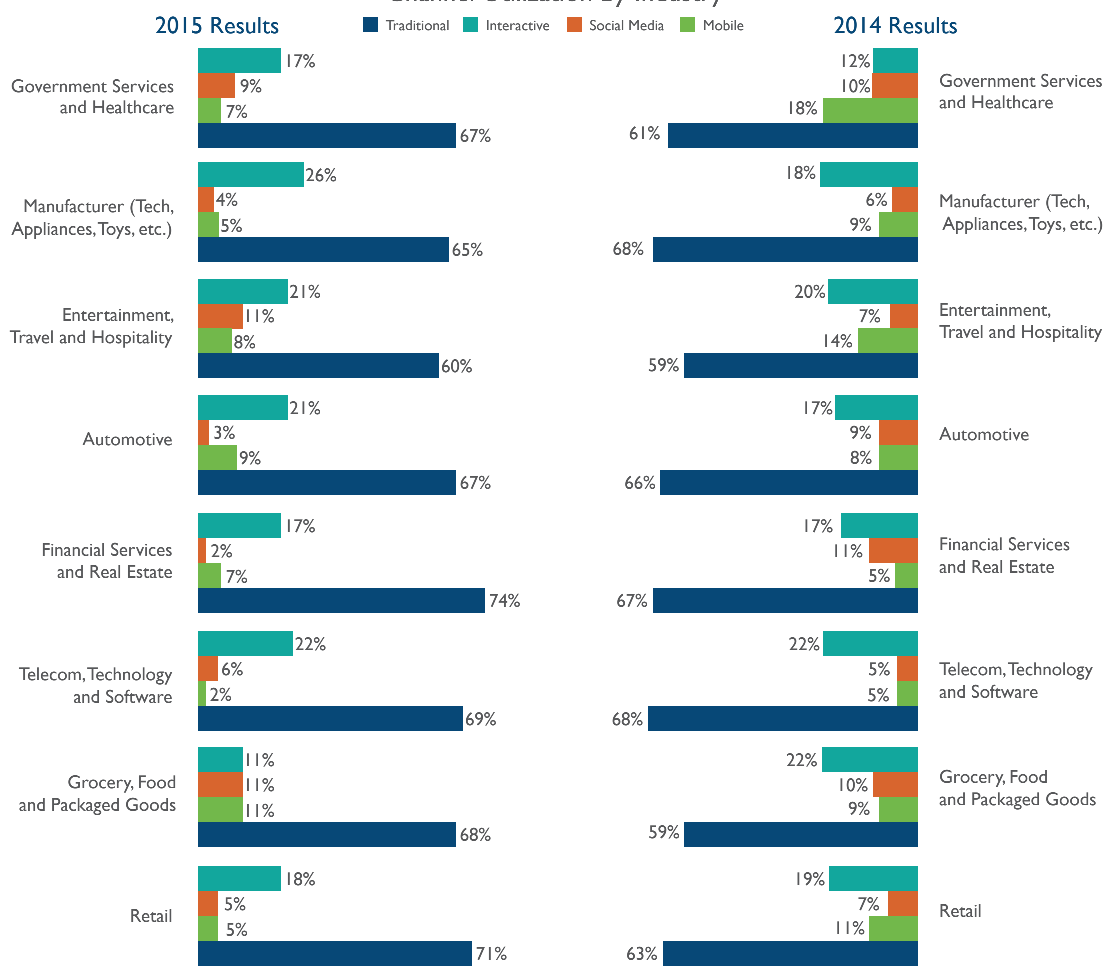
Usage and Outcomes, cont.

CUSTOMER CARE USAGE BY INDUSTRY AND INDUSTRY BY CHANNEL

Like last year, the top three industries most often contacted for customer service include Telecom, Technology and Software, Retail and Manufacturers. While there was a universal decline in contact percentages across industries, Automotive was especially notable, with a 38% year-over-year decline, moving from 26% in 2014 to 16% in 2015. Manufacturers also experienced a sharp decline of 28%, moving from 54% in 2014 to 39% in 2015. Since these results don't necessarily indicate the frequency of contact, they should not be construed as an indicator of overall contact volumes. That said, when examining channel use by industry, the Traditional Care channel saw the majority of year-over-year growth.

Within the past 12 months, which types of companies have you contacted for customer service? (Select all that apply)

Channel Utilization By Industry*



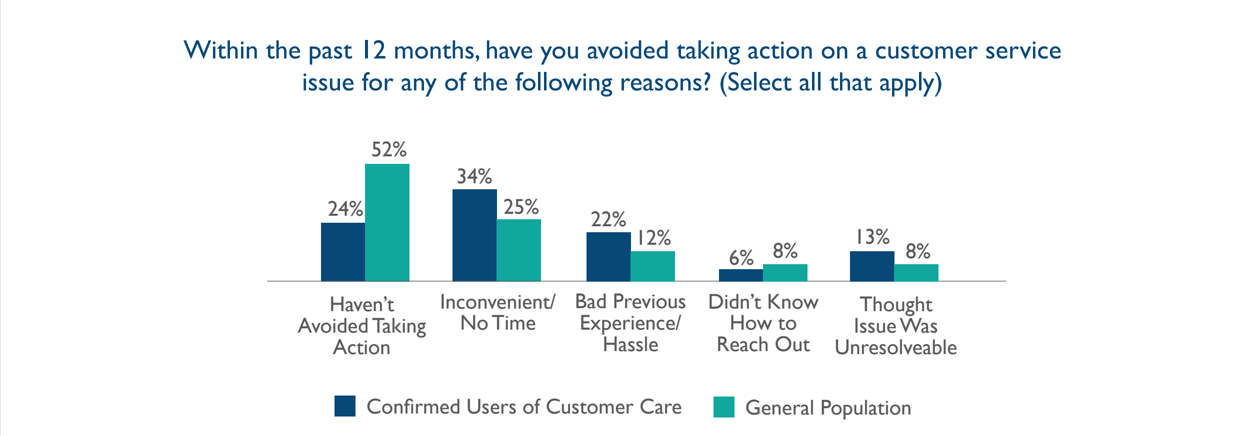
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

CARE AVOIDANCE AND FIRST CONTACT RESOLUTION (FCR)

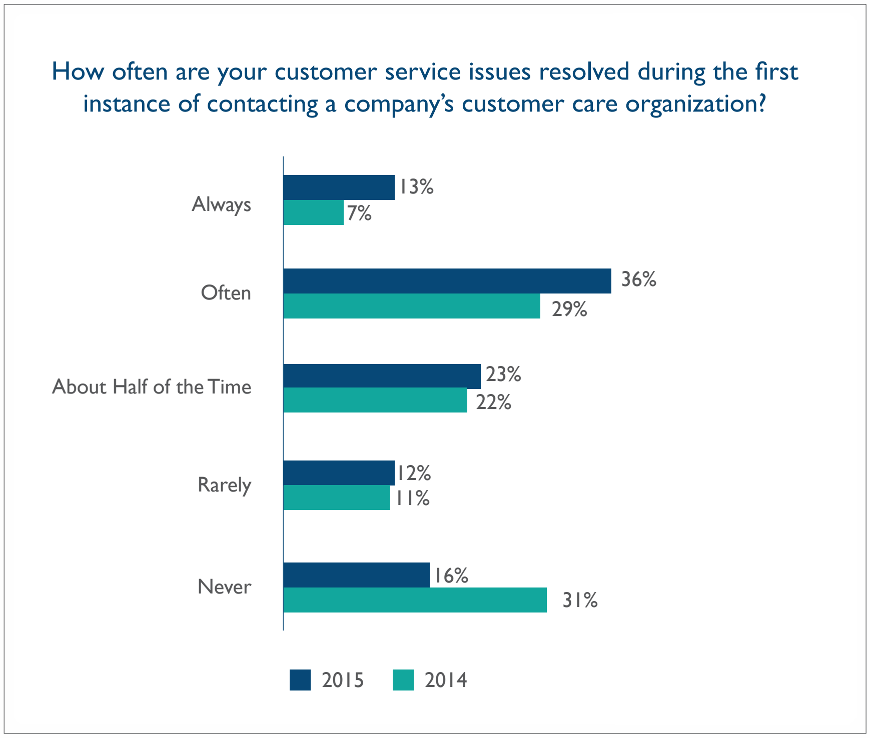
Inconvenience continues to be the leading cause of customer care avoidance, both among qualified users of care and the general population. As for First Contact Resolution (FCR), consumers reported significant improvements.

Deeper analysis of the avoidance question shows that men are 25% more likely to avoid taking action on an issue due to a "Bad Previous Experience/Hassle," and those ages 65+ years are the least likely to avoid taking action on a customer care issue at a combined "Confirmed User of Care" and "General Population" rate of more than 45%.

Avoiding Contacting Customer Care*†



First Contact Resolution**



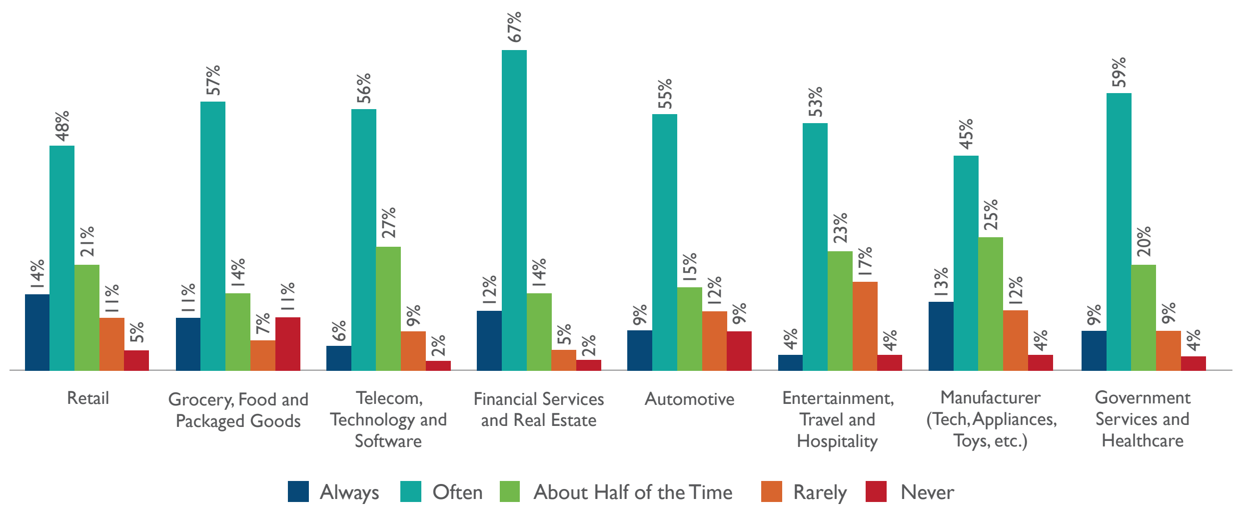
Year over year, dramatic improvements were realized in the area of First Contact Resolution. From the nearly 50% reduction in "Never" responses to the strong gains in "Always" and "Often" answers, the industry has made great strides in this critical area.

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 207 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 298 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 408 online responses. Sample: National Adult Internet Population.

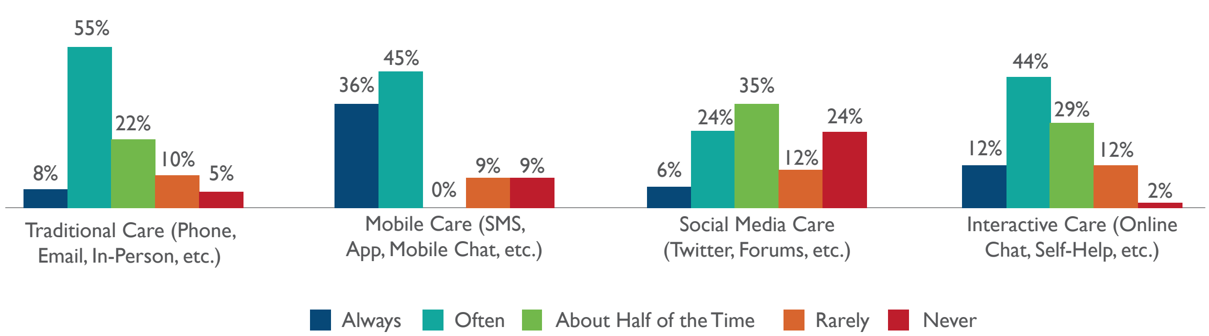
FCR BY INDUSTRY AND CHANNEL USE

New for 2015, we cross-referenced our FCR results with both "Industry Contacted" and "Channel Most Used" results. While participants were not directly asked how often they received a FCR from a specific industry or through a specific channel (i.e., "How often are your issues resolved during a first instance of contacting a retail company's customer care organization?"), the relationship between an individual contacting a specific industry and their response to the FCR question is enough to draw some general inferences; likewise for FCR by channel most used.

How often are your customer service issues resolved during the first instance of contacting a company's customer care organization? (By Industry Contacted in the Previous 12 months)*



How often are your customer service issues resolved during the first instance of contacting a company's customer care organization? (By Contact Channel Most Used in the Previous 12 months)*



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

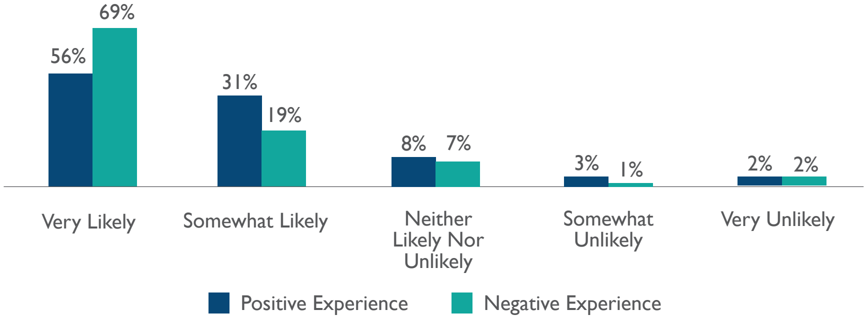
EXPERIENCE AND ITS IMPACT ON FUTURE INTENT AND ACTION

When we asked questions regarding sharing an experience and an experience's influence on future purchase intent, 2015 results closely mirrored those of 2014.

People continue to indicate they are more likely to share a negative experience versus a positive one. This finding is reinforced by a similar result in the "Unhappy Consumer" section, where 83% of those surveyed said they had, in fact, shared a negative experience. Like last year, a critical takeaway is that so many people said they would share an experience, whether positive or negative. Clearly, word of mouth is as critical as ever for today's businesses.

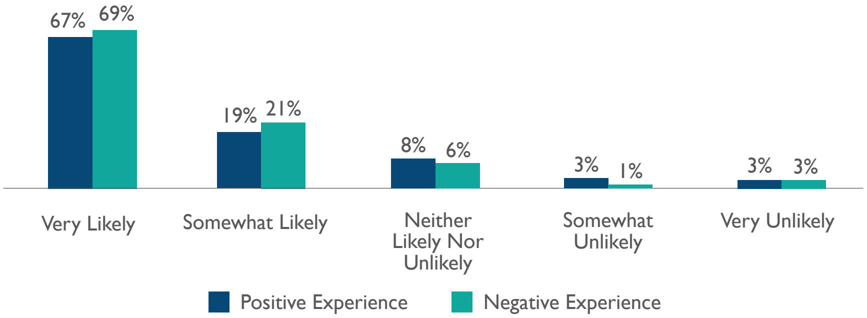
Sharing An Experience*

How likely or unlikely is it that you would share an experience (positive or negative) with a brand's customer service department with friends, family and others?

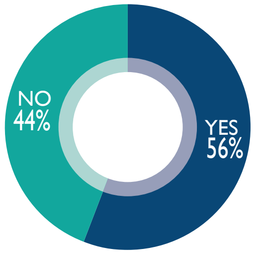


Purchase Intent*

How likely or unlikely is it that an experience (positive or negative) with a brand's customer service department would affect (in a positive or negative way) your future purchase decisions?



Has a brand ever lost your business because you received poor customer service?†



New for 2015, we asked 370 consumers if poor customer service resulted in a loss of business. Furthermore, we asked participants to identify all the reasons why the service was poor. Here are the results:

Rude or Unhelpful Agent: 50%
Didn't Resolve the Issue: 37%
Took Too Long: 30%
Brand Didn't Want to Help: 30%
Uninformed Agent: 21%

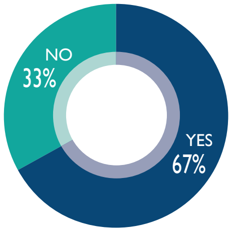
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 207 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 370 online responses. Sample: National Adult Internet Population.

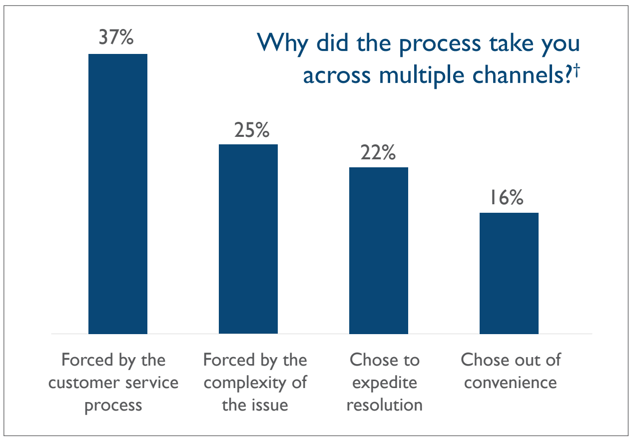
EXPLORING THE CONSUMER EXPERIENCE

In this year's study, we wanted to turn our attention to the critical topic of multi-channel support — that is, reaching resolution for a specific issue by communicating in more than one channel, typically involving Traditional Care and one or more alternative channels. We began this investigation by double-qualifying individuals, first as having had a customer care interaction in the previous 12 months, then as having had a multi-channel experience. We ultimately arrived at 201 survey participants. Their responses provided great insight into the consumer's perception of the multi-channel journey.

As we suspected, the vast majority (more than two-thirds) of consumers who utilize customer care are taking a multi-channel approach. This fact emphasizes the importance of brands mastering the nuances of channel transition and integration.

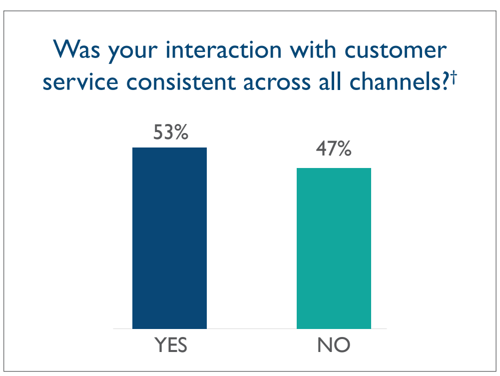
Within the past 12 months, did you use multiple channels (e.g., phone, email and social media) to resolve a single customer service issue?*

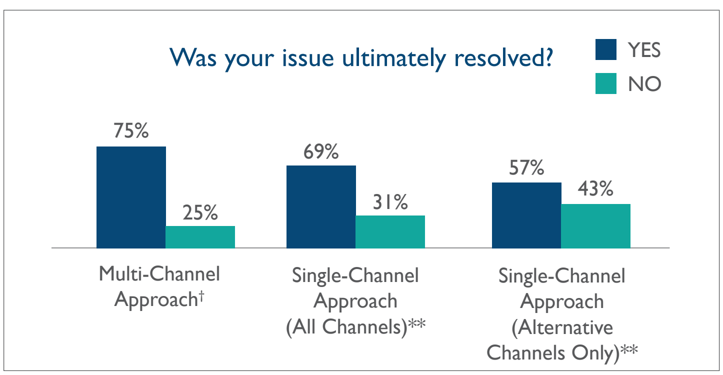




Perhaps troubling is the fact that the majority of multi-channel experiences (62%) are involuntary. While the complexities of some issues will inevitably necessitate cross-channel touch points, brands need to be aware of any process steps that might unnecessarily take consumers across channels. At the same time, brands need to take care to foster aspects of multi-channel servicing that have some consumers viewing the approach as a quicker or more convenient option.

Key success measurements of a multi-channel experience are consistency and, ultimately, issue resolution. While these results will need to be trended to get a clear picture of how businesses are doing, the initial findings are slightly mixed on the consistency front, although very promising when it comes to resolution. As illustrated in the chart below (right), when we polled regarding issue resolution by approach, the highest percentage of consumers had their issues resolved by taking a multi-channel approach. These findings also make it apparent that alternative channels are more effective at resolving issues when they are incorporated as a part of a larger, multi-channel approach. Businesses should continue to strive to improve consistency across channels, as well as understand how their own channel mix impacts issue resolution for their customers.





*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 769 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, August 13, 2015 – August 14, 2015 and based on 310 online responses. Sample: National Adult Internet Population.

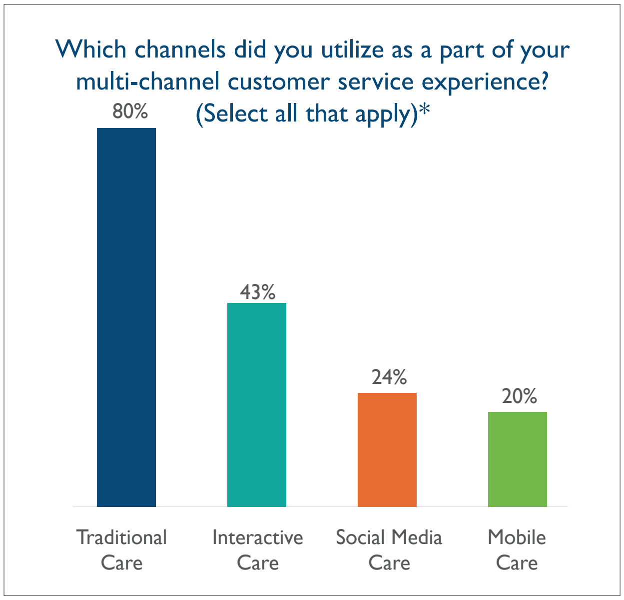
THE CUSTOMER CARE EXPERIENCE

The Multi-Channel Journey, cont.

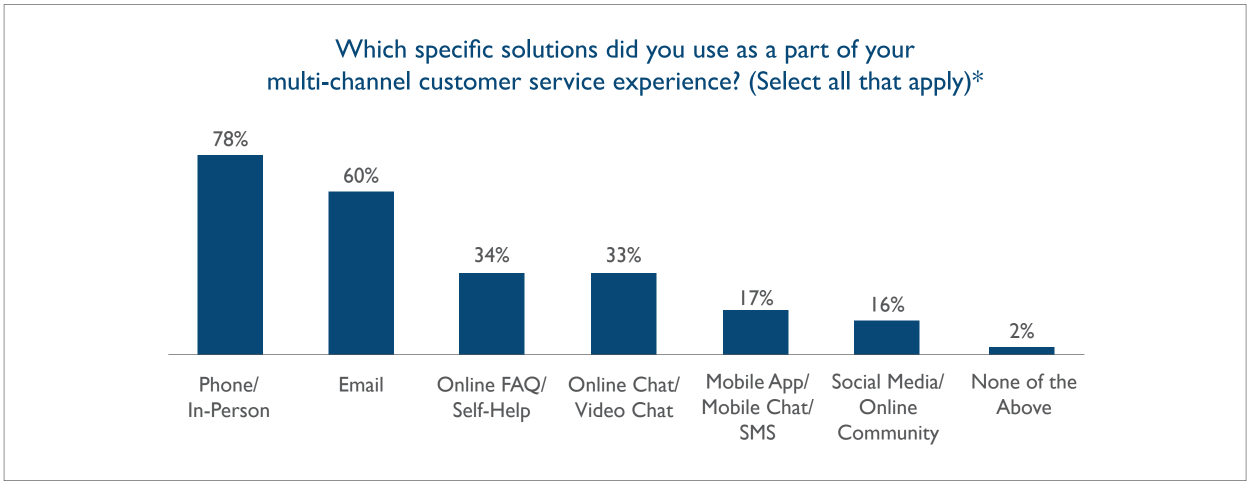
TRACING THE JOURNEY

Not surprisingly, Traditional Care played a central role in almost all multi-channel experiences. These rates align closely with overall channel use (Page 7), so one can expect these rates to shift as overall channel use shifts.

This result also stresses the importance of providing a superb Traditional Care experience — a channel that remains the most heavily utilized, while firmly establishing itself as a kind of Grand Central Station on the multi-channel journey.



Echoing the above results, Phone/In-Person and Email solutions dominated the multi-channel equation. While the multi-channel mix of each individual company may vary depending on their specific channel and solution offerings, companies need to carefully consider the multi-channel experience they are presenting to their customers. Along with this consideration, they need to ask essential questions like, "Is Phone service easily accessible from all other channels?," "What are the specific reasons that drive our customers to opt for a multi-channel approach to resolve an issue?" and "What can we do to drive consistency across channels?"

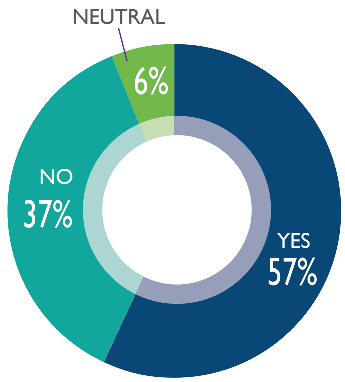


*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

GAUGING SATISFACTION

Was the multi-channel experience satisfactory? If yes, why? If no, why not?*

While it remains to be seen if consumers will ultimately view the multi-channel journey as a convenience or a burden, early indications around CSAT show there is significant opportunity for improvement, and businesses should strive to embrace the approach. Although most consumers are fairly new to the experience, and most companies are still feeling their way through the technology and the process, 37% of survey participants indicated that the experience was not satisfactory. Much work remains to perfect the multi-channel journey, but it's clear that the use of the approach is only going to grow.



Top Drivers of Each Respective Answer (above right)*

YES	NO
Greater options to reach resolution	**Took more effort and time**
Made the process easier	**Too complicated and frustrating**
Quicker resolution	Automated systems were ineffective
More convenient and flexible	Made it more difficult to reach a human
Access to more information	Some channels seemed like a waste of time
Allowed for resolution on my timing and terms	Same runaround in multiple channels
Better communication	

Given the drivers of multi-channel CSAT, it is apparent accessibility, speed and convenience are essential parts of the positive experience. Businesses need to continue to look for effective multi-channel options, as well as opportunities for seamless channel-to-channel migration.

On the other side of the equation, inconsistent channel quality and difficulty in getting in contact with a live person largely propelled dissatisfaction. If companies are serious about offering a satisfying multi-channel experience, they need to be equally effective across channels, and always provide clear, simple mechanisms for consumers to quickly reach a live, empowered agent.

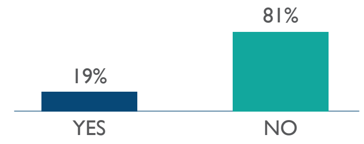
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

WHERE NEGATIVE EXPERIENCES OCCUR

This year, we wanted to explore the particulars of negative consumer experiences when interacting with customer care. To do so, we created a new, seven-question module focused on where negative events were occurring, as well as the underlying causes and outcomes.

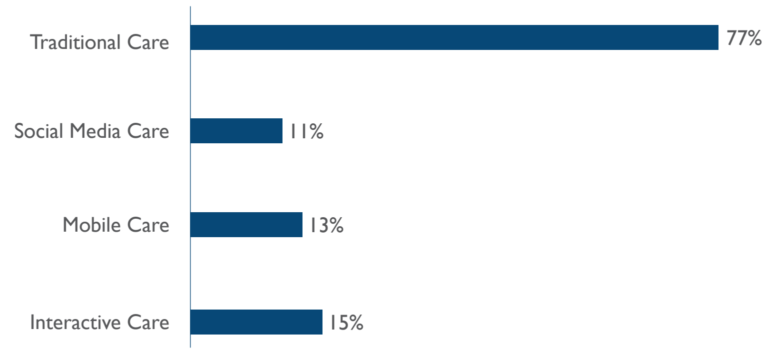
When we asked whether or not participants had a negative customer care experience in the previous 12 months, 19% responded they had. It should be noted that this question was a qualifier — it was asked of the general population where only 80-90% of respondents had even had a customer care experience within the previous 12 months.

Within the past 12 months, have you had a negative experience when interacting with a brand's customer service department?*



Of the 19% who had a negative experience, we asked the following:

Within which communication channel(s) did the negative experience occur? (Select all that apply)†

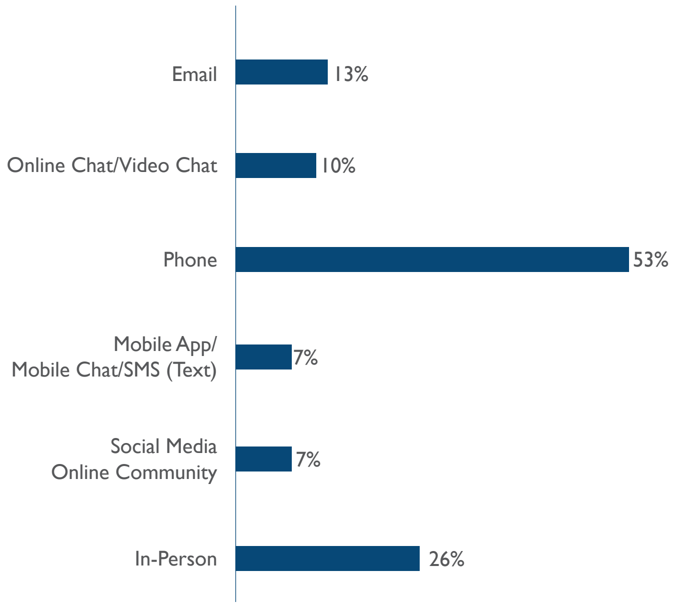


Inferred Quality Rating

Interactive Care: +23
Mobile Care: +7
Social Care: +5
Traditional Care: +3

About this rating:
Since some care channels are used more often than others, we wanted to put in place a mechanism that would account for this imbalance. The above Inferred Quality Rating is an expression of the percentage difference between utilization rates (page 7) and negative experience rates. While not a precise model, this rating is intended to provide a general sense of channel quality. The higher the number, the less likely were the odds of a survey participant having a negative experience in the channel.

Which specific contact method(s) were you using when the negative experience occurred? (Select all that apply)†



Inferred Quality Rating

Email: +30
Online/Video Chat: +25
Phone: +17
Mobile App/Chat/SMS: +6
Social Media: +5
In-Person: -6

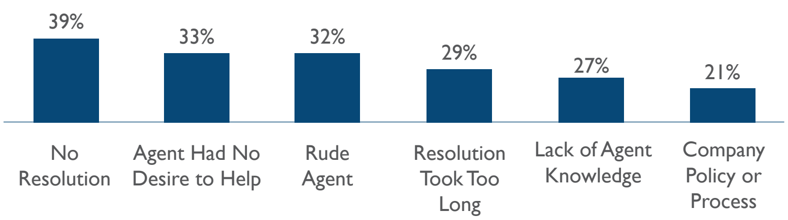
About this rating:
Since some care solutions are used more often than others, we wanted to put in place a mechanism that would account for this imbalance. The above Inferred Quality Rating is an expression of the percentage difference between utilization rates (page 7) and negative experience rates. While not a precise model, this rating is intended to provide a general sense of solution quality. The higher the number, the less likely were the odds of a survey participant having a negative experience in the channel.

*Methodology: Conducted by Google Consumer Surveys, June 5, 2015 – June 7, 2015 and based on 1,833 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 207 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, June 5, 2015 – June 7, 2015 and based on 227 online responses. Sample: National Adult Internet Population.
††Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

NEGATIVE EXPERIENCES AND THE IMPACT

The reasons for negative experiences were mostly split between two buckets: resolution-related issues and agent-related issues. Resolution-related issues include lack of resolution ("No Resolution") and resolution taking too long. Agent-related issues include rudeness, absence of desire to help and lack of agent knowledge. Targeting these two areas would be highly effective in combating negative experiences within customer care channels.

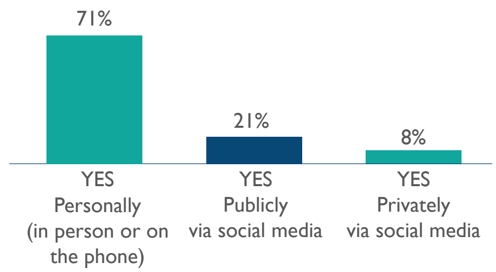
What made the experience negative? (Select all that apply)*



Did you share this negative experience with friends, family and/or strangers?*

YES: 83%

If yes, how did you share the experience?*



Echoing the findings on page 14, the overwhelming majority of consumers are likely to share a negative experience. The ramifications of this finding cannot be overstated — a negative customer care experience is likely to have influence beyond that of the single individual. Positive care experiences need to be delivered for the benefit of individual customers, but also for the benefit of the brand.

Will this negative experience impact your future purchase decisions?*

YES: 82%

Even though the customer service experience was negative, was your issue eventually resolved to your satisfaction?*

YES: 32%

As profound as the finding above might be, equally alarming is the effect of a negative customer care experience on future purchase decisions, with 82% of participants indicating some impact.

We also asked if the issue was ultimately and satisfactorily resolved, regardless of the negative experience. In 32% of cases, it was. Interestingly, however, of those who had their issue resolved to their satisfaction, the majority (>80%) said the experience would still impact their future purchase decisions. In other words, when it comes to avoiding customer churn, avoiding a negative experience throughout the course of the engagement is as critical as providing an end resolution to the issue.

*Methodology: Conducted by Google Consumer Surveys, June 5, 2015 – June 7, 2015 and based on 227 online responses. Sample: National Adult Internet Population.

CONCLUSIONS

THE CUSTOMER CARE EXPERIENCE

There were many interesting findings throughout this part of our research as we explored the customer's journey and experience. Highlighted below are a few insights to consider as you continue to work on your specific customer experience strategy.

Channel mix was consistent compared to 2014, with Traditional Care dominating, followed by Interactive Care at a distant second. A significant shift appears in frequency of use, with Traditional Care increasing by 13% year-over-year and Interactive and Mobile Care both decreasing. This suggests that consumers are increasingly looking towards tried-and-true channels to resolve issues, **making it all the more important for program strategists to continue to strengthen the quality of service provided through Traditional Care channels.**

Inconvenience continues to be the leading cause of consumers' avoidance of customer care, although First Contact Resolution (FCR) saw improvements over 2014. **So while there are still issues with perceived inconvenience, which need to be addressed, the industry has made strides in improving FCR. Issue resolution is a key driver of the customer experience, so as that improves, so too should overall customer satisfaction.**

Turning our attention specifically to the multi-channel journey, we found that over two-thirds of surveyed customer care users said they took a multi-channel approach. Traditional Care played a central role in almost all experiences, again **reinforcing the importance of providing a superb Traditional Care experience**. Over 60% of respondents said they were forced to take a multi-channel approach due to either the process or complexity of the issue. Furthermore, roughly half said their interaction was consistent across channels. This shows that **brands need to continue to improve consistency and be aware of any process steps that might unnecessarily take consumers across channels. When a channel transition is necessary, businesses should work to ensure the transition is seamless and convenient, providing a solid path to resolution.**

The data in our research indicates that alternative channels are more effective at issue resolution when they are incorporated as part of a larger, multi-channel approach. In fact, 75% of consumers said their issues were typically resolved when taking a multi-channel approach, higher than a single channel approach. So the multi-channel journey can be very effective **and companies should understand how their own channel mix impacts resolution for their customers, working to maximize and streamline those interactions.**

57% said their multi-channel experience was satisfactory, but almost 40% said it was not. Reasons included "took more effort and time" and "too complicated and frustrating." So there is still work to be done to deliver a consistent, convenient and positive experience. **Companies need to listen to what THEIR consumers are saying and take action to improve in those areas.**

In summary, to continue to elevate the customer experience, companies must:

- **Continue to strengthen the level of service provided through Traditional Care, as it is still the dominant channel and central in the multi-channel journey**

- **Ensure their service strategy directs transactions to channels with the greatest likelihood of resolving the issue, with seamless and convenient channel transitions when they are necessary for reaching a resolution**

- **Develop strategies and solutions with a focus on issue resolution and convenience**

- **Identify the gaps in THEIR customers' multi-channel experience and take action to improve**

OPINIONS REGARDING CUSTOMER CARE

Consumers possess a specific set of preferences and expectations. From the channels and solutions they most often use and prefer to the brands they think are doing it best, this section explores consumer opinion regarding these and other aspects of the customer care journey.

- CHANNEL PREFERENCES
- EXPECTATIONS
- GENERAL OPINIONS

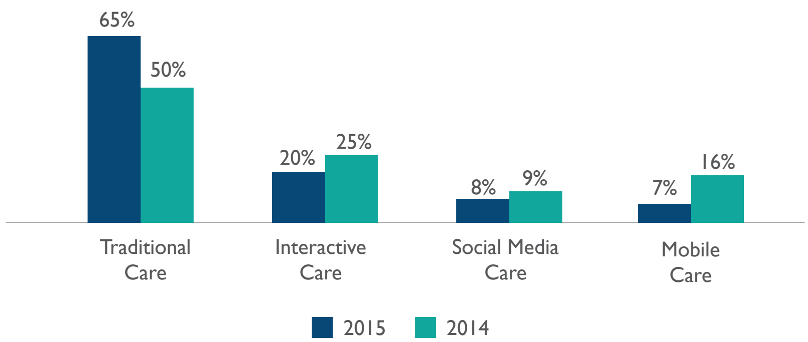
PREFERRED CONTACT CHANNEL AND WHY

Like last year, we took a deep dive into channel preferences. We wanted to understand which channels consumers prefer, assuming their issue would be resolved regardless of channel selection.

As demonstrated in the "Channel of Most Frequent Use" finding on page 8, Traditional Care has enjoyed a resurgence from 2014 to 2015, both in terms of preference and use. It's unclear exactly why this might be the case, but some reasons might include: 1) Consumers increasingly prefer to speak with a live person; 2) The novelty of some alternative channels has worn off, leading some to return to tried-and-true channels of care; and 3) Traditional Care has emerged as the central junction of a multi-channel approach that typifies today's customer care exchange.

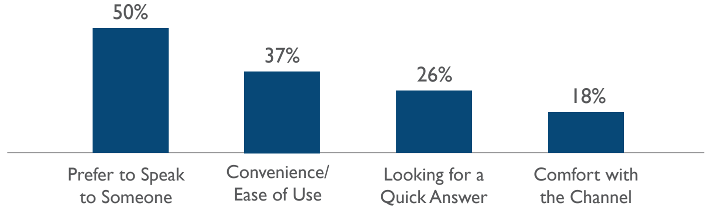
Whatever the cause, it's clear that consumers are unlikely to abandon or decrease their reliance on Traditional Care solutions in the near term, and it's possible their preference for the channel may further strengthen.

If you knew your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method?*



Given the consumer's propensity for Traditional Care, it should come as no surprise that the largest driver of channel preference is the desire to speak with someone, a fact further defined by separate results aimed at interaction preferences (page 29). These results not withstanding, there was one interesting demographical observation worth noting: "Prefer to Speak to Someone" was indicated by 63% of those 55 years and older, but only 33% of those 18–24 years. For this group (18–24 years), "Looking for a Quick Answer" was the top response, at 61%.

What are the biggest factors in determining your preferred channel of care? (Select all that apply)*



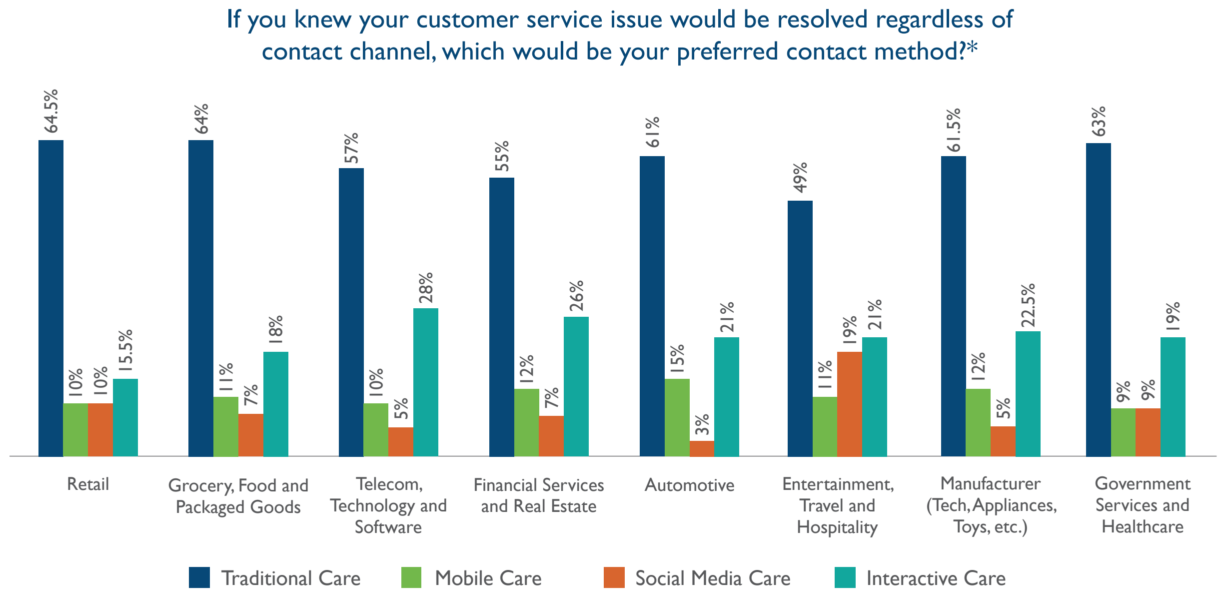
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

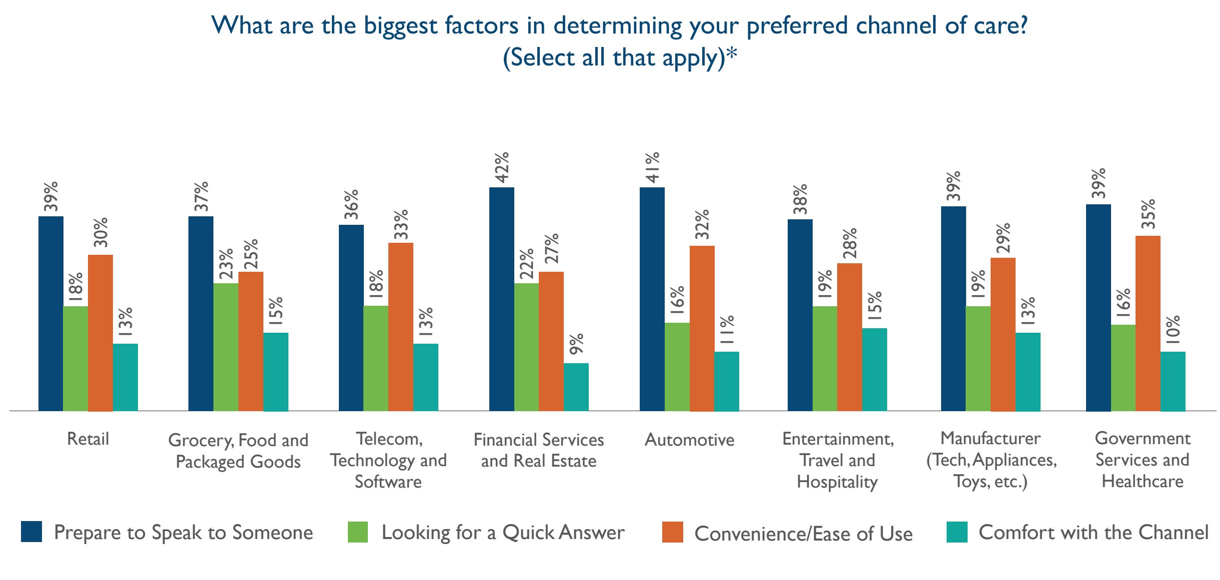
OPINIONS REGARDING CUSTOMER CARE

Channel Preferences, cont.

PREFERRED CONTACT CHANNEL BY INDUSTRY

To provide a greater industry-specific perspective in this year's report, we cross-referenced a number of findings with "Industries Being Contacted" results (page 11). On this page, we cross-reference industry results with findings that target preferred contact method and factors that determine preference. While these results are not weighted (sample sizes range by industry, from 24 up to 104), they still provide a general indication of channel preference and top factors for that preference broken out by industry.





*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

OPINIONS REGARDING CUSTOMER CARE

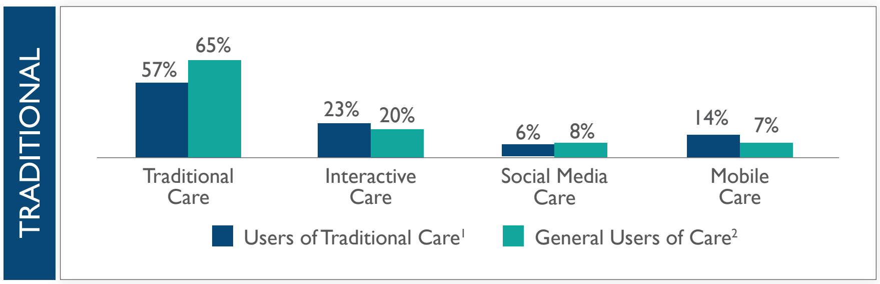
Channel Preferences, cont.

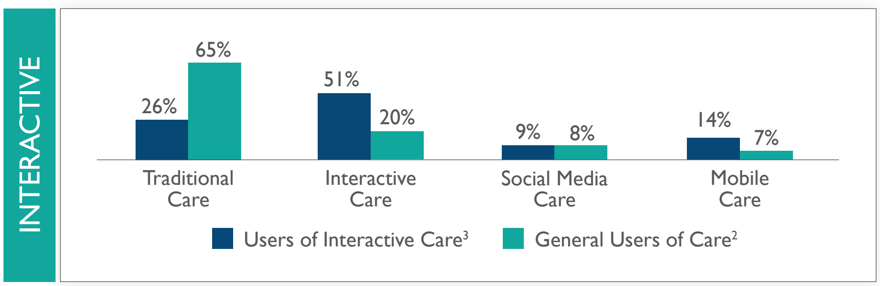
PREFERRED CONTACT CHANNEL BY CHANNEL USE

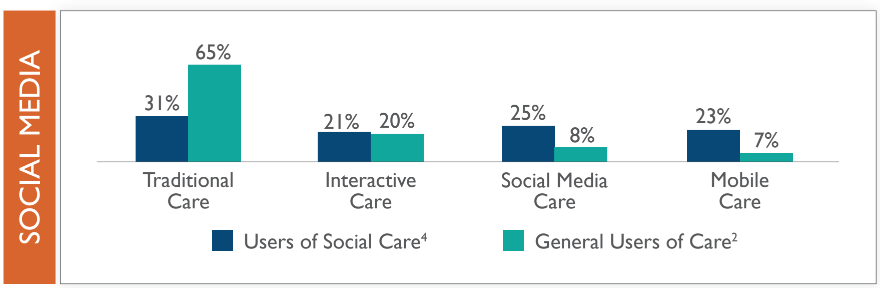
With channel preference being such an important topic, we posed this question to multiple survey groups — specifically, those screened as users of care (irrespective of channel, referred to in these results as "General Users of Care") and those screened as users of each respective channel of care (Traditional, Interactive, Social Media and Mobile). In this way, we were able to compare, for instance, the channel preference of Users of Interactive Care to General Users of Care.

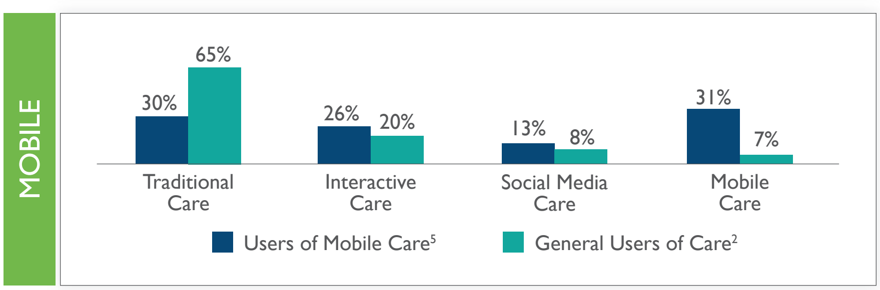
The results show tremendous channel loyalty among users of Interactive Care (51% retention) and Mobile Care (31% retention), with strong preference for Traditional Care among all channel users.

If you knew your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method?









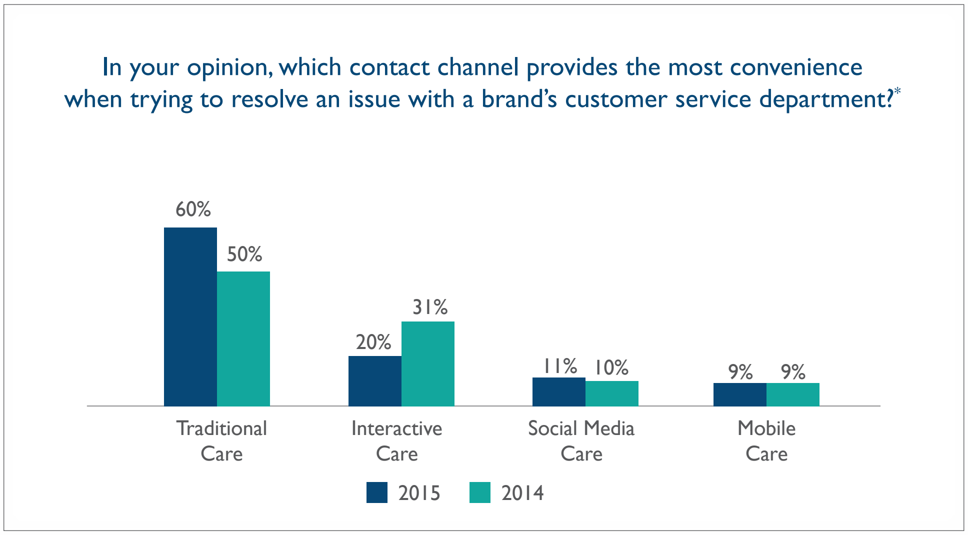
1 Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.
2 Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.
3 Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.
4 Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.
5 Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 212 online responses. Sample: National Adult Internet Population.

OPINIONS REGARDING CUSTOMER CARE

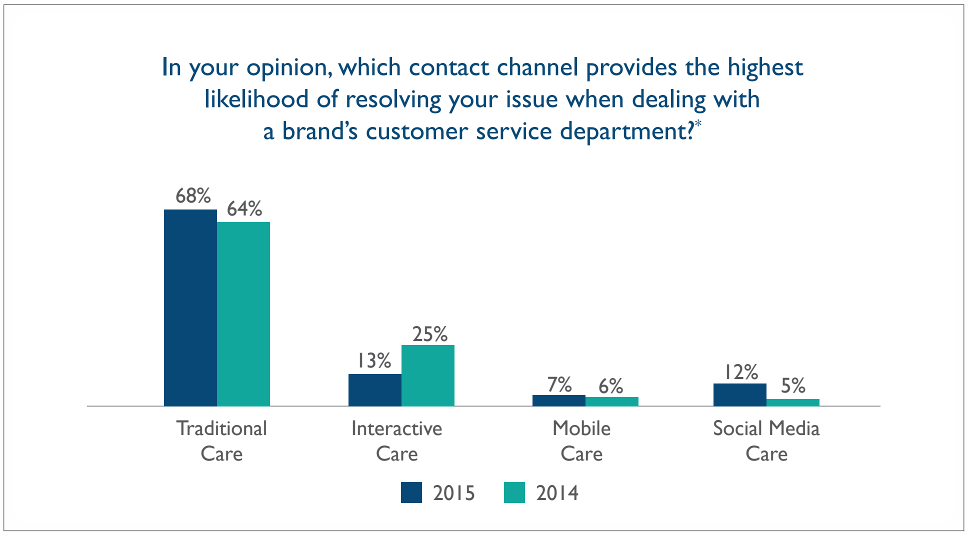
Channel Preferences, cont.

CHANNEL PERCEPTIONS

In keeping with the positive trends regarding Traditional Care, when we asked consumers which contact channel provided the most convenience, Traditional Care made a 20% year-over-year move (50% to 60%). Conversely, Interactive Care experienced a 35% decline (31% to 20%) within the same set of results.



The most significant shift in consumer perception of channel resolution rates came between Interactive and Social Media Care. When we asked which customer care channel provided the highest likelihood of getting an issue resolved, Interactive Care experienced a sharp year-over-year decrease of 48%, while consumer opinion of finding resolution within the Social Media Care channel exploded by 140%. Given the importance of issue resolution in determining CSAT, businesses should make an effort to understand the reasons for these shifts in consumer perception.



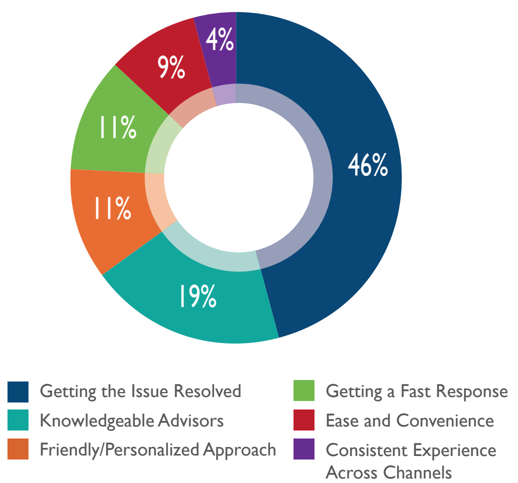
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

WHAT MATTERS MOST TO CONSUMERS

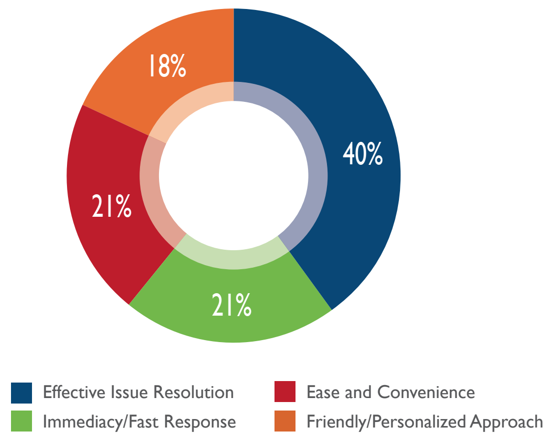
Based on discoveries from last year's report, we continued our exploration of which characteristics of care are most important to consumers. For 2015, we expanded our survey selections to provide greater granularity to the results. "Getting the Issue Resolved" dominated the responses in 2015, similar to "Effective Issue Resolution" in 2014. Additionally, there was a strong showing for "Knowledgeable Advisors," demonstrating that consumers are acutely aware of the influence of agent quality on the customer care experience and getting the issue resolved.

Which characteristic of an interaction with a brand's customer service department is most important to you?*

2015 Results



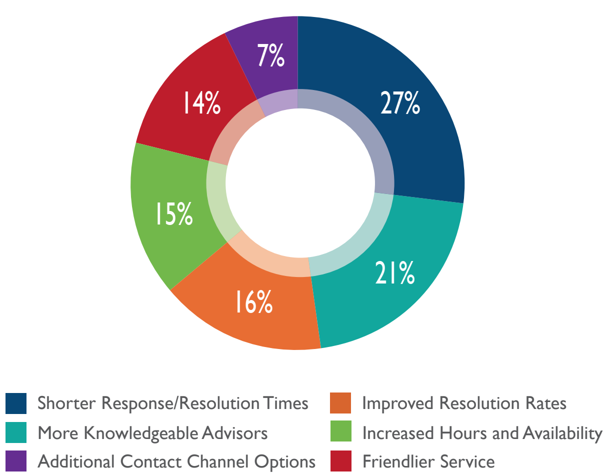
2014 Results



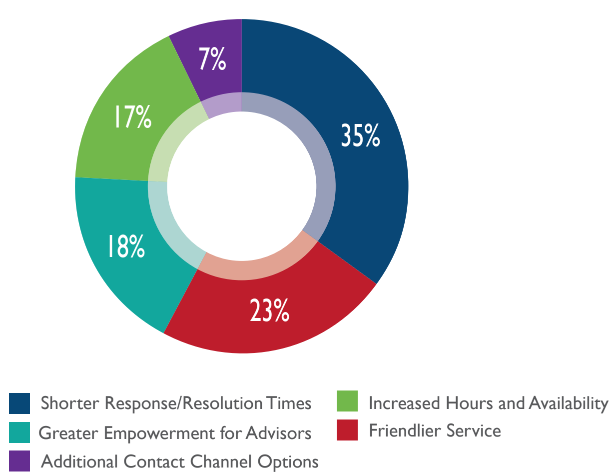
Similar to the above scenario, we've altered the possible responses to the question of what would most significantly impact satisfaction when interacting with customer service. Specifically, we replaced "Greater Empowerment for Advisors" with "More Knowledgeable Advisors," and added "Improved Resolution Rates." Even with these slight modifications, results were very consistent year over year, with "Shorter Response/Resolution Times" continuing to lead the way.

In your opinion, which improvement would most significantly impact your level of satisfaction when interacting with a brand's customer service department?†

2015 Results



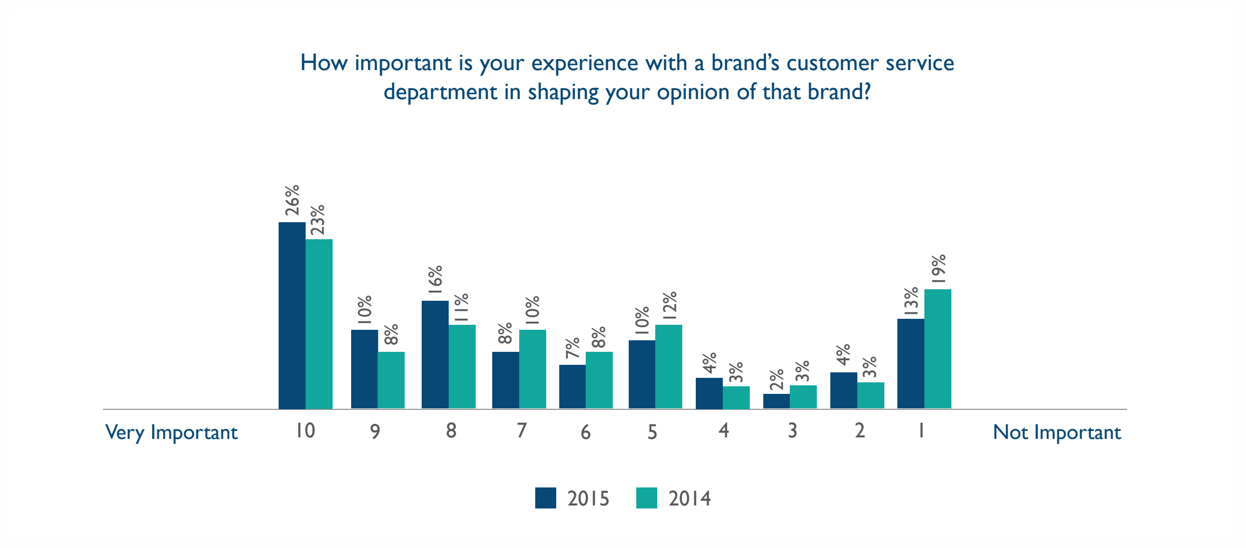
2014 Results



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 191 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 207 online responses. Sample: National Adult Internet Population.

CUSTOMER EXPERIENCE IMPACT

The importance of experience in shaping brand opinion registered a notable bump in 2015 when compared to 2014. Last year, the results of the question below averaged 6.1, whereas 2015 results averaged 6.7. This represents a ten percent shift up the scale in gauging the importance of experience in shaping brand opinion.



With 200 individual, free-form responses to the question of how customer service can better serve customer care needs, there was a fair bit of range and diversity in the responses we received. One theme that leapt out of the results revolved around the human element. By and large, respondents not only wanted to speak with a live person, they also had high expectations for that person. Chief among these expectations were strong speaking and listening skills.

To best summarize the results, we developed a word cloud (below) based on the most frequent, non-common words used in the pool of responses. The larger the word, the more frequent its use in the responses we received.

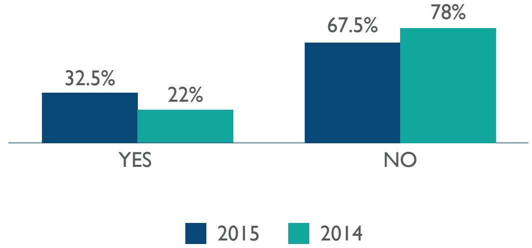
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 254 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 200 online responses. Sample: National Adult Internet Population.

NEEDS, EXPECTATIONS AND FUTURE DIRECTION

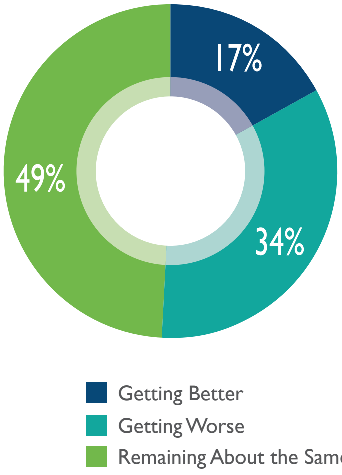
Based on the results of the survey question to the right, 2015 presented a significant increase in the percentage of consumers that felt companies were generally meeting customer service needs and expectations.

It would be difficult to pinpoint the exact cause of this rise, but we can surmise that it is mostly likely the result of a combination of factors. Some of these could include a renewed focus on agent quality, increased channel options and greater attention to CSAT/FCR. Whatever the cause, we look forward to discovering how this trend evolves with next year's surveying.

Do you feel that the customer service departments of today's companies are generally meeting your customer service needs and expectations?*



In general, do you think that companies are getting better or worse at providing good customer service?†



In an entirely new question for 2015, we wanted to explore consumer opinion about the direction of customer care. While the relationship between these results and the ones above are not definitive, as we trend these results over time, we would expect to see a correlation between an increase in "Yes" responses (above) and a growth in "Getting Better" (left). We will watch closely as these results mature by way of additional data points.

Asking consumers if they think customer service is getting better or worse was only part of our exploration. We also wanted to understand why they felt the way they did, so we followed up with the question below.

In coverage of these results, we have included some select verbatim examples, although a few themes were apparent. For "Getting Better" responses, mention of new channel offerings were common, as well as references to politeness. For those who responded with "Getting Worse," off-shoring and automation were the most commonly cited pain points.

If getting better, in what way? If getting worse, in what way?**

Verbatim of Consumers Who Said
"Getting Better"

"More personalized. More channels to connect. More information."

"More personalized access to help."

"Quicker response times."

"Attention to customer satisfaction."

Verbatim of Consumers Who Said
"Getting Worse"

"It seems to be getting harder and harder to get in touch with an actual human being; and most of the time when you finally do, you have reached a call center in India, or wherever."

"Too much phone automation. I want a real person to talk to."

"Lack of training … customer service reps have no power to do anything, and don't want to escalate anything."

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 200 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 561 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

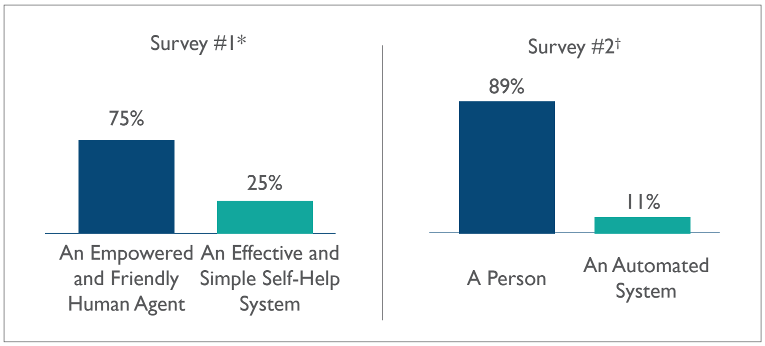
OPINIONS REGARDING CUSTOMER CARE

General Opinions, cont.

INTERACTION PREFERENCES

Initial surveying presented an interesting result regarding consumer engagement preferences. Specifically, we wanted to understand if consumers preferred to interact with a person or an automated system. We assumed we would see mixed results, but were surprised to discover how strongly consumers preferred human interaction. Upon rerunning the survey with slight alterations to the response options, the results of the second survey only served to reinforce the conclusions of the initial results.

In the event of a customer service issue, which would you rather interact with (assuming both are equally capable of resolving the issue)?



In Survey #1, we wanted to try to draw a quality comparison by painting a positive experience for each respective scenario, hence the adjective use in the response options. When we reran the inquiry (Survey #2), we omitted the adjectives and tried to simplify the comparison. The subsequent results swung further in the direction of consumer preference for human interaction. We also tried to get greater clarity for these results by asking participants to specify the reasoning for their preference. See left for some verbatim examples that capture the essence of those results.

Please indicate any specific reasons for your preference …†

"Machines don't have feelings ... empathy is key when resolving a customer issue."

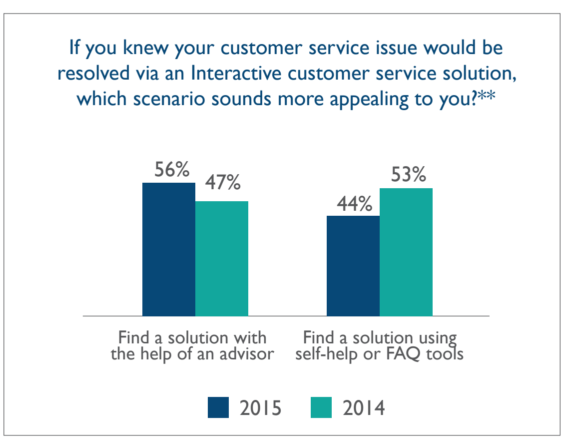
"Real people can intuitively resolve problems. Automated systems cannot."

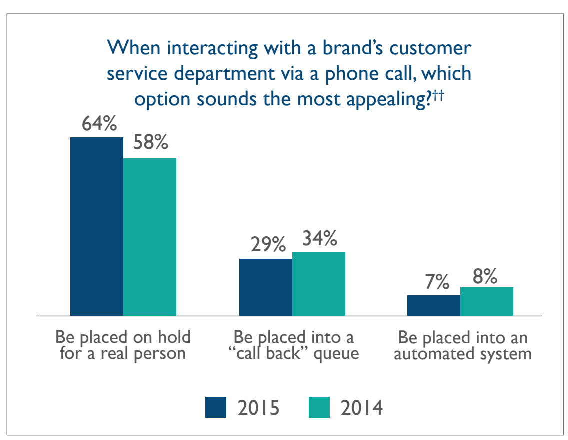
"Because not everything can be scripted."

"The automated systems do not offer enough flexibility — limited options."

"I feel like people are more helpful, reliable and relatable."

Similar results were also strongly reflected elsewhere in our research. The below findings are included in their appropriate channel sections (Interactive Care and Traditional Care, respectively), but we also decided to include them here as supporting context for the above results. Given the year-over-year reversal of consumer preference for receiving help from an advisor versus finding an answer on their own (bottom, left), businesses should strive to understand and respond to the specific preferences of their own customers.





*Methodology: Conducted by Google Consumer Surveys, June 4, 2015 – June 6, 2015 and based on 283 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 26, 2015 – June 28, 2015 and based on 194 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.
††Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.

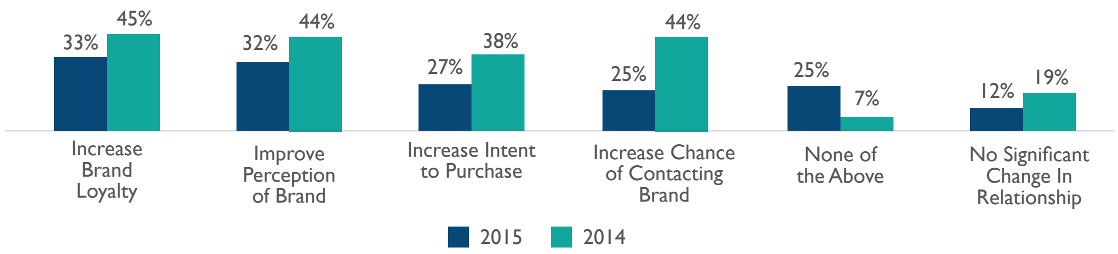
OPINIONS REGARDING CUSTOMER CARE

General Opinions, cont.

STAFFING, PAYING FOR BETTER CARE AND BRANDS DOING IT BEST

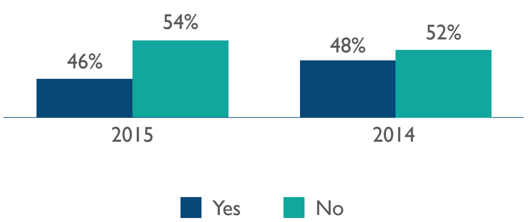
On the whole, consumers seem less influenced by the implications of off-shoring/on-shoring, although on-shoring still results in a positive response in more than 80% of respondents (removing "None of the Above" from the response pool). While the question below explores the consumer's positive reaction to on-shoring, negative responses to off-shoring (i.e., difficultly understanding accents) as demonstrated elsewhere in this report should remain a major consideration regarding this topic.

If you knew a company staffed its customer service team exclusively within the United States, how would it impact your relationship with that company? (Select all that apply)*



Consistent with last year's result, about half of consumers continue to express that they'd be willing to pay a little more for better service. While the structure of this question is subjective (for instance, what constitutes "a little more"), what's apparent in these results is the importance and value that a large percentage of consumers place on receiving "world-class" customer service.

Would you be willing to pay a little more for a product or service if you knew you would receive world-class customer service as a result?**



In your opinion, which brands, companies and/or industries do the best job at providing superb customer care?†

Amazon.com
Apple
Nike
Ford
Southwest
Target
Walmart

Although the above list refers to the most commonly cited brands, the most common answer speaks directly to the hard work that remains in transforming consumer perception of customer care. Like last year, the most common response (>15%) to the question of which brands do customer care best: **None/No One**

*Methodology: Conducted by Google Consumer Surveys, June 4, 2015 – June 6, 2015 and based on 200 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.
**Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 315 online responses. Sample: National Adult Internet Population.

CONCLUSIONS

OPINIONS REGARDING CUSTOMER CARE

It is important to understand consumers' expectations, preferences and overall opinion of the customer care journey. Below are some selected highlights from the findings.

A significant shift occurred in channel preference. 65% (versus 50% in 2014) of respondents said they preferred Traditional Care, assuming the issue would be resolved. This data shows it is unlikely consumers will abandon or decrease their reliance on Traditional Care solutions in the near term. Once again, this stresses t**he importance of providing high levels of care through this channel, even as companies introduce alternative channels into their overall strategy.**

Another shift was evident in the percentage of respondents who believe Traditional Care provides the most convenience, increasing from 50% in 2014 to 60% in 2015. Conversely, Interactive Care declined from 31% to 20%. When asked which channel provided the highest likelihood of resolving the issues, Traditional Care increased somewhat to 68% (the highest), while Interactive Care declined from 25% to 13%. **This may provide some insight into the strong increases in Traditional Care usage and preference, but brands should analyze their own trends to determine if the same is occurring in their business, and seek to understand the cause of the change.**

Not surprisingly, respondents indicated that "Issue Resolution" remains the most important characteristic when it comes to interacting with customer care, followed by "Knowledgeable Advisors." Agent knowledge is almost always tied to issue resolution, affecting consumer confidence in the accuracy of information provided. These two drivers should be of key focus, but **it is recommended that organizations conduct a key driver analysis of all channels to quantify and understand what matters most to their customers, then utilize that data to develop strategies and improvement plans.**

The ability to speak to a live, competent and knowledgeable agent continued to be an important factor in channel preference. In fact, over 75% of consumers said they would prefer to talk to a live person versus an automated or self-help system. This was mostly due to difficulty resolving issues, lack of empathy and limited options.

It was encouraging to learn that compared to 2014, more consumers feel customer service departments are generally meeting needs and expectations. As stated previously, FCR results also improved, which is likely a direct cause of this increase. Other possible reasons for the improved perception include increased channel options, greater attention to customer satisfaction and renewed focus on agent quality.

In summary, brands should:

- **Continue to strive to provide high levels of quality in the Traditional Care channel**
- **Identify any shifts in usage between channels; determine the causes if shift are found**
- **Understand their own customers' preferences, expectations and drivers of customer satisfaction; incorporate these understandings into strategies**
- **Focus on improving issue resolution in all channels while ensuring there is a simple and convenient process for talking to a live, empowered and knowledgeable agent**

CHANNEL-SPECIFIC **RESULTS**

Continuing with the methodology of previous reports in the series, the 2015 Consumer Edition of the CXMB organizes channel-specific results around four primary channels of care: Traditional Care, Interactive Care, Social Media Care and Mobile Care.

- TRADITIONAL CARE
- INTERACTIVE CARE
- SOCIAL MEDIA CARE
- MOBILE CARE

We framed these channels for survey participants in the following manner:

Traditional Care — Phone, Email, In-Person and Mail
Interactive Care — Online/Video Chat, FAQ, Self-Help
Social Media Care — Twitter, Facebook, Forums, etc.
Mobile Care — Mobile Apps, Text/SMS, Mobile Chat

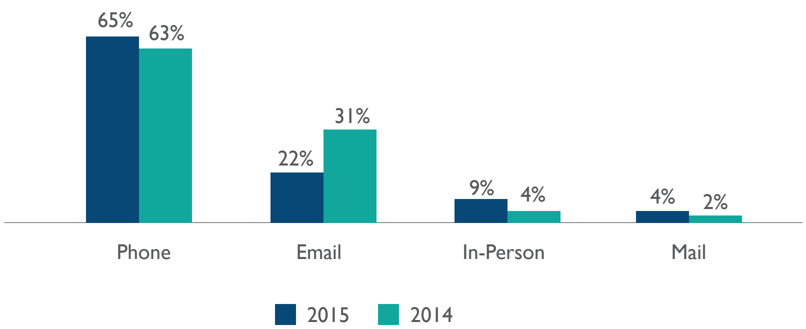
TRADITIONAL
CARE

Use of the Traditional Care channel (typically Phone) continues to epitomize today's customer care experience. In the context of this research, Traditional Care is framed as the following: Phone, Email, In-Person and Mail.

SOLUTION USE AND REASONS FOR CONTACT

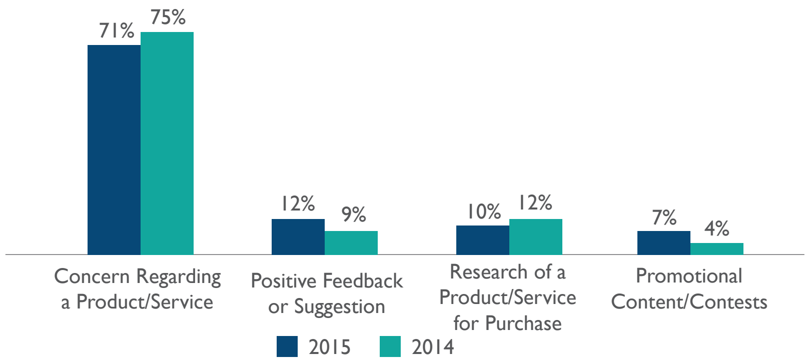
Phone and Email continue to form the bulk of all Traditional Care interactions, although survey results indicate a precipitous decline in Email usage — falling 29% year over year. This change comes as no surprise, as some businesses employ strategies to shift consumers away from Email. When combined with an ongoing expansion of alternative channels that offer greater options for consumers, we expect the use of Email to only continue to decline.

Within the past 12 months, which Traditional customer care solution have you used the most to connect with a brand's customer service department?*



If your brand is actively reducing Email use, where is the traffic going?

Within the past 12 months, which scenario typifies your reason for interacting with a brand's customer service department via Traditional Care?*



Can alternative channels be enhanced to become more issue resolution driven?

As expected, little changed in the breakdown of why consumers are using the Traditional Care channel. "Concern Regarding a Product/Service" continues to dominate the results. Traditional Care's role as an issue resolution channel is further reinforced when the percentage of this top response (71%) is compared to the same response percentage in each of the three alternative channels (Interactive Care at 60%, Social Media Care at 26% and Mobile Care at 50%). This is an important point for businesses to consider as they think through the role that each channel might play in a multi-channel environment.

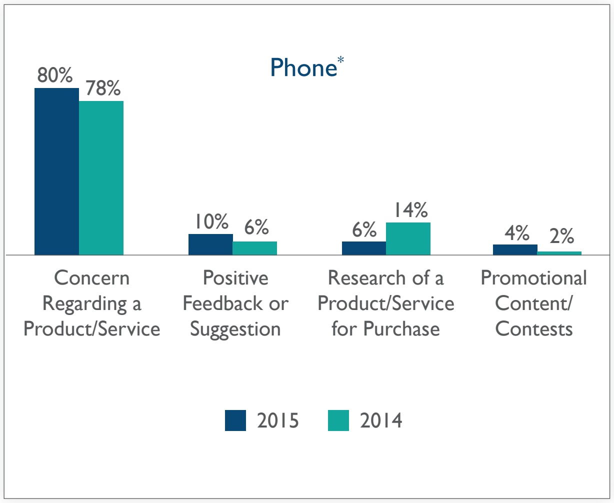
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.

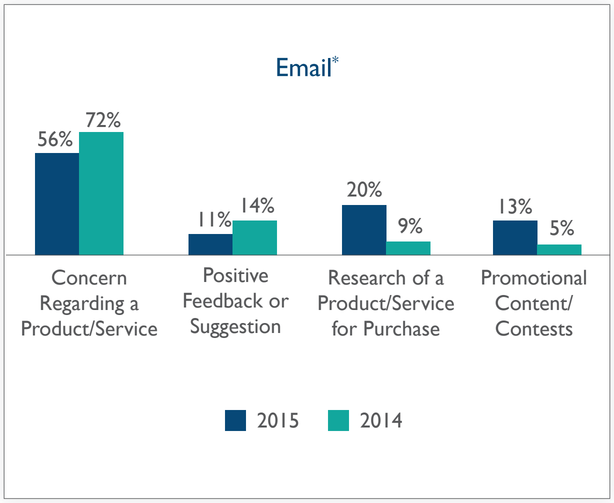
CHANNEL-SPECIFIC RESULTS

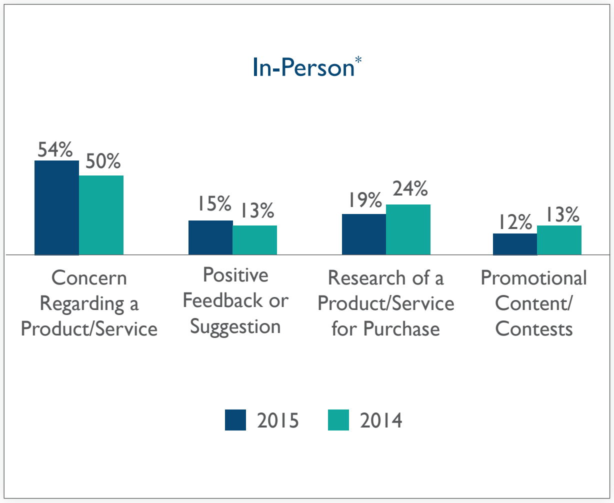
Traditional Care, cont.

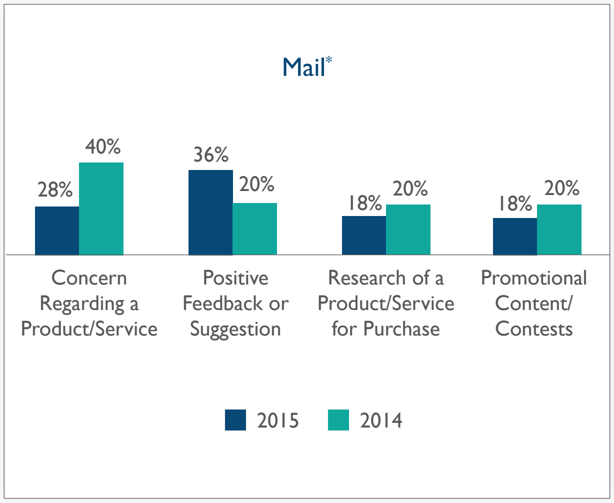
REASONS FOR CONTACT BY SOLUTION

On the previous page, we explored which Traditional Care solutions consumers are using, and the general reasons for using Traditional Care. Here, we examine those reasons broken out by each individual channel solution. Naturally, "Concern Regarding a Product/Service" typifies each of the four different solutions that comprise Traditional Care, including Phone, Email, In-Person and Mail. Of all the different solutions, Phone is most heavily used for resolving issues.









*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.

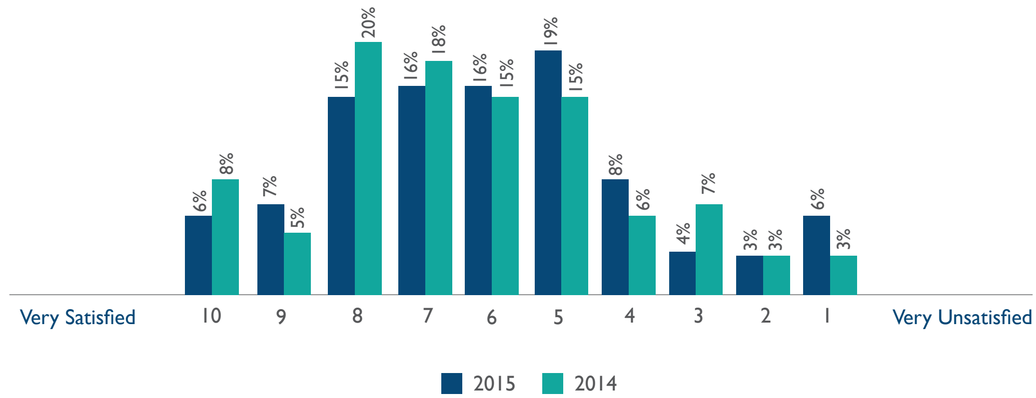
CHANNEL-SPECIFIC RESULTS

Traditional Care, cont.

SATISFACTION AND CHARACTERISTICS OF IMPORT

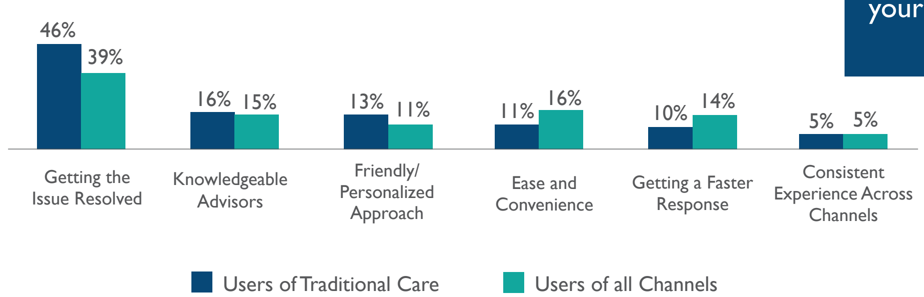
Satisfaction with Traditional Care continues to lag behind both Interactive and Mobile Care, with no improvement year over year. The percentage of those who indicated dissatisfaction (with a rating of 1, 2 or 3) was 13%, the same as in 2014. The percentage of those who indicated they were satisfied (with a rating of 7, 8, 9 or 10) was only 44% in 2015, compared to 51% in 2014. To put this in context, Interactive Care (with a rating of 7, 8, 9 or 10) came in at 63% in 2015, almost 20 points higher than Traditional Care.

Within the past 12 months, what was your typical level of satisfaction with a brand's customer service department following a Traditional customer care interaction?*



In 2015, consumers strengthened their indication of "Getting the Issue Resolved" as the most important characteristic of a customer service interaction. However, closer examination of these results revealed specific preferences based on demographics. For instance, males were nearly three times more likely to select "Friendly/Personalized Approach" compared to females, whereas females were almost twice as likely to select "Knowledgeable Advisors." A "Friendly/Personalized Approach" was also most strongly indicated by those ages 55+ years, with 18% of respondents indicating it as the most important characteristic.

When interacting with a brand's customer service department, which characteristic is most important to you?†



Are you basing your channel strategies on the demographics of your customer base?

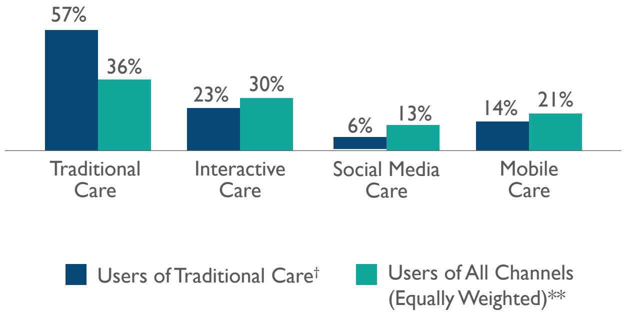
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 291 online responses. Sample: National Adult Internet Population.

PREFERRED CHANNEL OF CARE

Consumers continue to show strong preference for the Traditional Care channel. When we asked confirmed users of Traditional Care the question to the right, 57% favored Traditional Care compared to 47% in 2014.

Unlike similar results on page 22 — which reflect responses from the general public — the chart to the right provides weighted results from confirmed users of each respective channel of care. While the other channels gain significant ground when comparing users of Traditional Care to users of all channels, Traditional Care still maintains its position as the most heavily preferred channel of care, coming in at a preference rate of 36%.

If you knew your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method?*

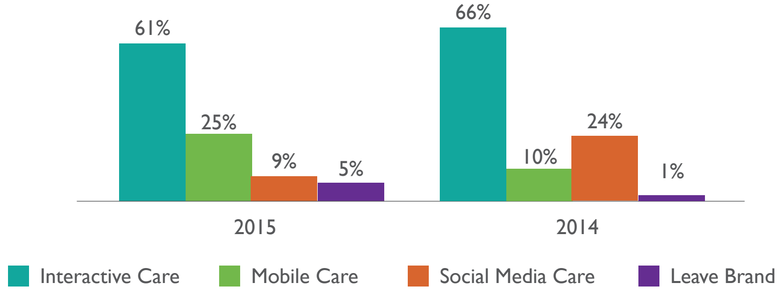


† "Users of Traditional Care" are confirmed users of one or more Traditional Care solutions within the previous 12 months. **"Users of All Channels (Equally Weighted)" is an equal weighting of results from confirmed users of each respective channel (Traditional Care, Interactive Care, Social Media Care and Mobile Care) within the previous 12 months.

Are you prioritizing your channel plans according to your customers' preferences?

Like last year, we continued to explore where consumers might turn if Traditional Care was no longer offered as a channel option. Interestingly, the most significant shift came in the area of Mobile Care. In 2014, only ten percent of respondents indicated Mobile Care as a channel of first resort, absent Traditional Care, versus 25% of respondents in 2015. This represents a massive 150% increase. Also of note is the increase in those who would simply leave the brand, although this category still makes up only a small sliver of the overall responses.

If a brand's customer service department no longer offered Traditional customer service channels, which alternative channel would you look to first to resolve an issue? *



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.

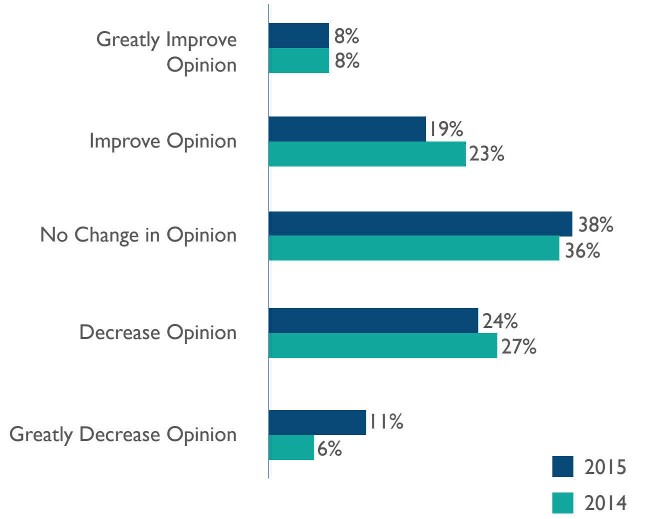
CHANNEL-SPECIFIC RESULTS

Traditional Care, cont.

TRADITIONAL CHANNEL IMPRESSIONS

On the whole, consumers continue to be ambivalent to negative toward the idea of decreased Traditional Care availability, even if means increased support for alternative channels. The most notable change was the more than 80% move (from 6% to 11%) in the number of respondents who would have a "Greatly Decreased Opinion" of a brand that would make such a move. This result is aligned with a number of other 2015 CXMB findings that show similarly strong consumer support for the Traditional Care channel.

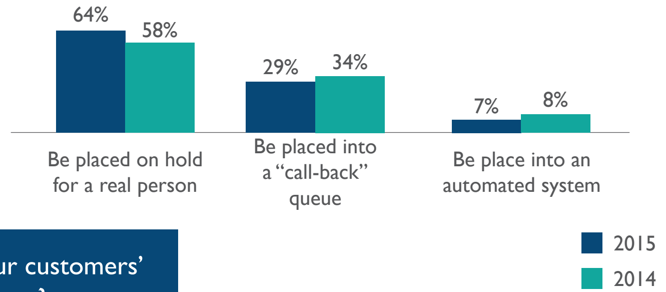
If a brand reduced its call center hours and increased support of other channels (like social media, mobile apps or online chat), how would your opinion of the brand change?*



Are you considering a change to your hours of support, and do you understand how the change might impact your customers?

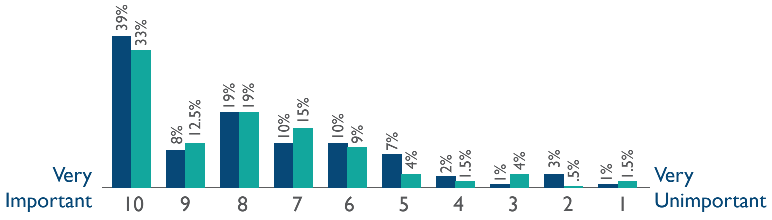
While not drastic, the shift in response to a question we posed regarding interaction preferences (right) continues to illustrate the consumer's strong preference for interacting directly with a human. In 2014, the majority of respondents indicated they would rather wait on hold for a real person versus be placed into a call-back queue or into an automated system. In 2015, this preference strengthened, now accounting for nearly two-thirds of responses, acquiring respondents from both the call-back and automated options.

When interacting with a brand's customer service department via a phone call, which option sounds the most appealing?*



Do you know what your customers' tolerance is for hold times?

How important is it for a brand's customer service department to offer Traditional customer service channels, such as phone, email and in-person support?*



When we asked consumers how important is was for a brand to offer support through the Traditional Care channel, very little changed in the responses received. The average response in 2014 was 8.0, and that remains the average response in 2015. We asked this same question of only one other channel — Interactive Care — and the average response to that question in 2015 was 7.6.

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.

CONCLUSIONS

TRADITIONAL CARE

Traditional Care (phone, email, in-person and mail) continues to dominate, remaining as the channel most frequently used by those surveyed.

As in previous years, phone and email remain the primary solutions for Traditional Care users. However, email usage declined by 29% year over year. This is not entirely surprising as some companies are actively working to shift email usage to other channels. **For businesses hoping to curb email volume, they need to ensure their strategies and processes are established to direct these transactions to channels that can effectively manage them to resolution.**

Traditional Care remains an "Issue Resolution Channel," with over 70% of those surveyed using this channel primarily for "Concern Regarding a Product/Service," and the majority of these interactions are by phone. This is much higher than the results indicated for other channels. Not surprisingly, "Getting the Issue Resolved" is the most important characteristic for Traditional Care users. **It is critical, therefore, for issue resolution to be the focus in this channel, especially considering the impact it has on customer satisfaction.**

Overall satisfaction with Traditional Care continues to lag behind Interactive and Mobile Care, with no improvement year over year. The percentage of those who indicated they were dissatisfied (with a rating of 1, 2 or 3) was 13%. The percentage of those who indicated they were satisfied (with a rating of 7, 8, 9 or 10) was only 44%, almost 20 points worse than interactive. Considering the importance that Traditional Care plays in the customer's journey, there is work to be done to improve the customer experience in this channel. **Organizations should look very closely at their own customer satisfaction AND dissatisfaction results. If these are not at high levels of performance, companies should determine the specific drivers and take action to fix them, particularly with regards to issue resolution.**

If Traditional Care was no longer available, the majority of those surveyed chose Interactive Care as their preferred alternative channel, same as in 2014,. Interestingly, preference for Mobile Care increased significantly year over year, but preference for Social Media declined. **At the end of the day, it is important for businesses to prioritize their own channel strategies according to their customers' preferences and demographics.**

When interacting with a brand via phone, over 60% of respondents said they would rather wait on hold for a live person versus being placed into a callback queue. This is an increase over 2014, **illustrating consumers' growing preference for interacting directly with live agents.**

In summary, Traditional Care continues to be a critical channel in the overall customer journey, and within the channel, the desire to speak to a "real" person remains an overwhelming preference. Brands need to continue to factor in the importance of Traditional Care, understand their customers' level of satisfaction, take action to improve performance and implement processes that maximize issue resolution.

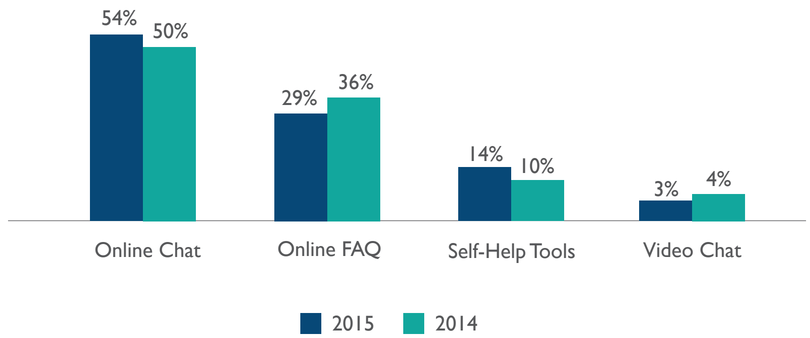
INTERACTIVE
CARE

Interactive Care is the alternative channel that consumers currently look to most to interact with brands. We defined Interactive Care to survey participants as the following solutions: Online Chat, Video Chat, FAQ and Self-Help Tools.

SOLUTION USE AND REASONS FOR CONTACT

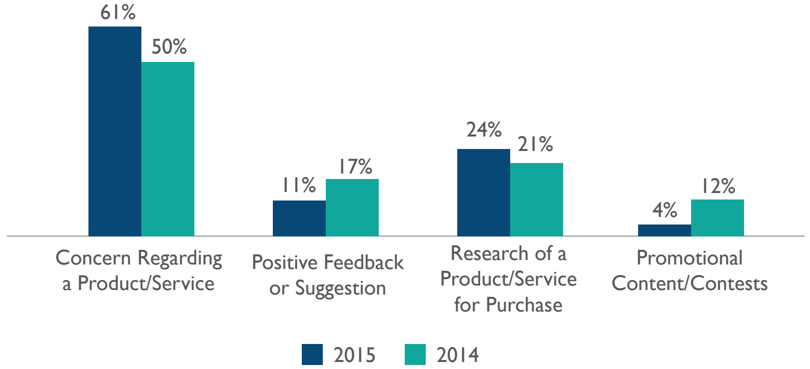
Online Chat remains the most popular solution within the Interactive Care channel, growing only slightly year over year — up eight percent (from 50% to 54%). Online FAQ use registered a decline of nearly 20% (from 36% to 29%), while Video Chat continues to remain at the margins of channel solution use (<5%).

Within the past 12 months, which specific Interactive channel solution have you used the most to connect with a brand and/or customer service department?*



Is FAQ traffic dropping at your organization? If so, what are the causes, and is the change desirable?

Within the past 12 months, which scenario typifies your reason for an interaction with a brand and/or customer service department via an Interactive channel?*

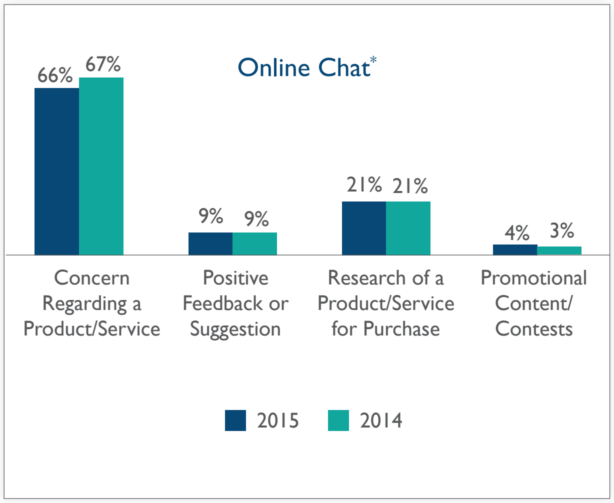


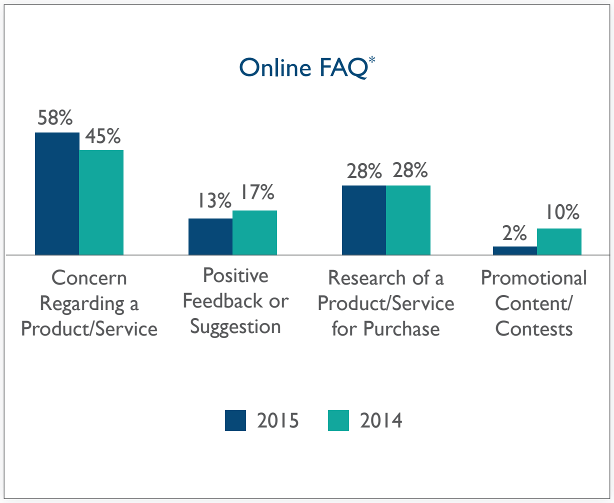
From 2014 to 2015, Interactive Care strengthened greatly in its role as an issue resolution channel. Its use for a "Concern Regarding a Product/Service" increased by 22% year over year, moving from 50% to 61%. "Research of a Product/Service For Purchase" also saw an uptick, while "Positive Feedback or Suggestion" and "Promotional Content/Contests" both saw broad declines.

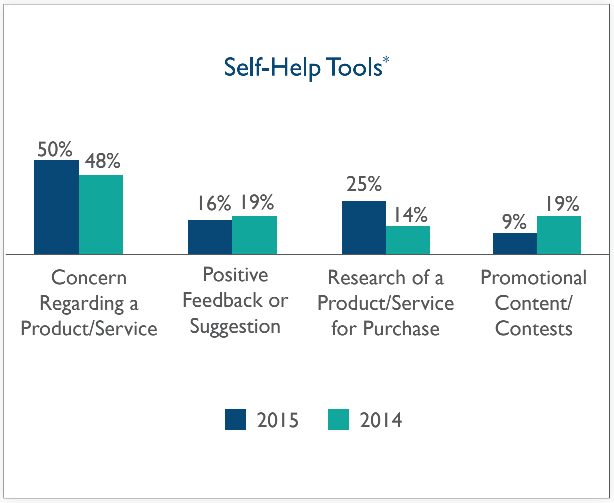
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.

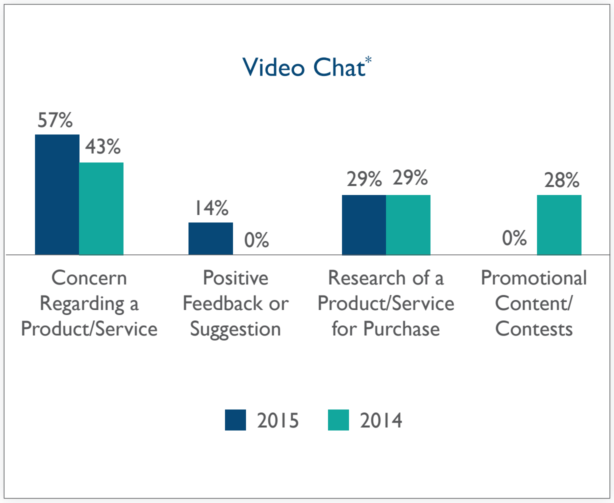
REASONS FOR CONTACT BY SOLUTION

The reasons consumers utilize the various Interactive Care solutions vary slightly. Online Chat, the most popular Interactive Care solution, was unchanged year over year: issue resolution continues as the primary function of the solution, with much of the balance of use aimed at product/service research for purchase. Online FAQ, the second most utilized solution in the channel, saw decreased overall volume while increasing its role as a issue resolution channel with the reason of "Concern Regarding a Product/Service" increasing by 28% (from 45% to 58%). Finally, Self-Help Tools increased its role as a research solution, with a 64% year-over-year increase in the number of respondents indicating they used the solution for such a purpose (14% in 2014 versus 25% in 2015).





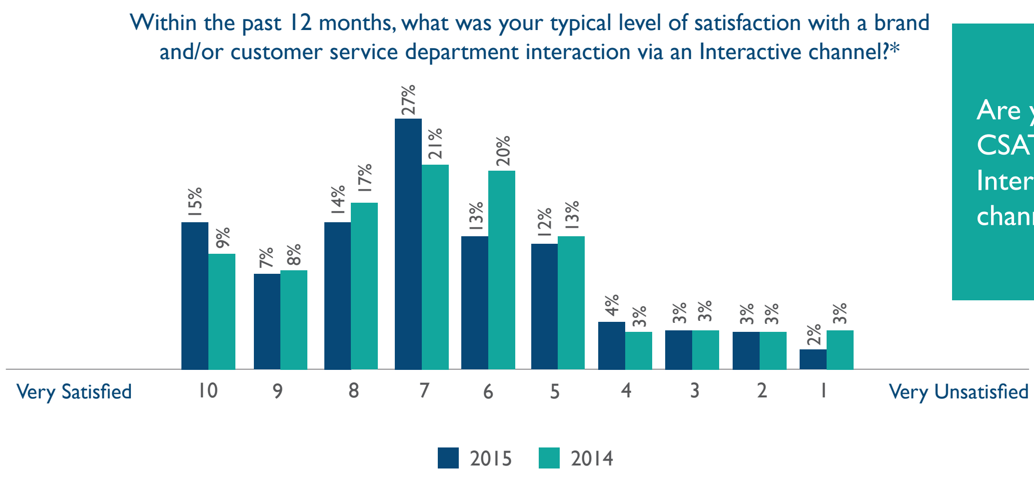




*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.

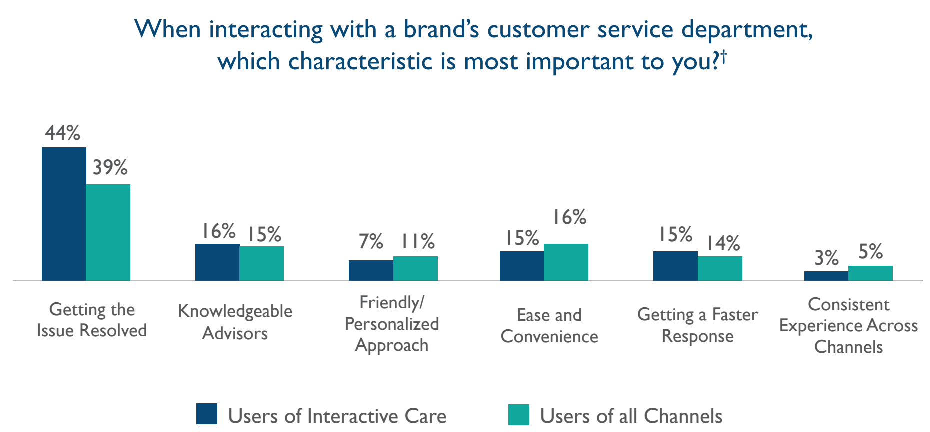
SATISFACTION AND CHARACTERISTICS OF IMPORT

Consumer satisfaction within Interactive Care did not change year over year, but continues to deliver greater results than Traditional and Mobile Care. The percentage of those who indicated dissatisfaction (with a rating of 1, 2 or 3) was eight percent, five points better than either Traditional or Mobile Care. The percentage of those who indicated satisfaction (with a rating a 7, 8, 9 or 10) was 63%, almost 20 points higher than Traditional Care, and nearly 10 points higher than Mobile Care. Higher satisfaction rates within Interactive Care suggests there is something to be learned from the channel, but there is still room for improvement to deliver a superior experience.



Are you measuring CSAT within your Interactive Care channel?

Users of the Interactive Care channel value "Getting the Issue Resolved" above all other characteristics of an interaction with customer service. Compared to users of all channels of care, this results most distinguishes users of the Interactive Care channel. Interestingly, one of the characteristics that Interactive Care users care the least about in comparison to users of all channels is "Friendly/Personalized Approach," which shows a 36% difference (7% for Interactive Users versus 11% for users of all channels).



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 287 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 291 online responses. Sample: National Adult Internet Population.

CHANNEL-SPECIFIC RESULTS

Interactive Care, cont.

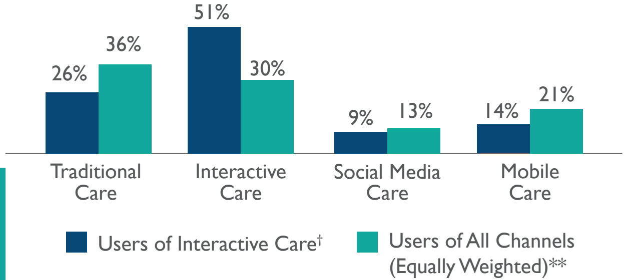
PREFERRED CHANNEL OF CARE

Loyalty to the Interactive Care channel remains very high. When we asked Interactive Care users about their preferred channel of care, Interactive Care received a channel preference rate of 51%. Only Traditional Care had a higher channel loyalty rate, which came in at 57%.

Preference for the Interactive Care channel among users of all channels (equally weighted) stood at 30%, second only to Traditional Care at 36%. Like last year, this data demonstrates that Interactive Care, in terms of consumer preference and usage, is second only to Traditional Care.

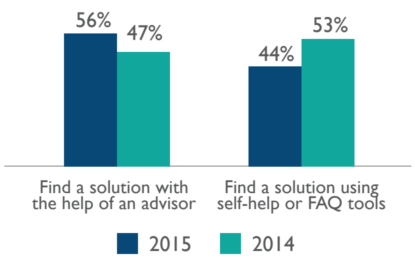
Are you maximizing the capabilities of your Interactive Channel?

If you knew your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method?*



†"Users of Interactive Care" are confirmed users of one or more Interactive Care solutions within the previous 12 months. **"Users of All Channels (Equally Weighted)" is an equal weighting of results from confirmed users of each respective channel (Traditional Care, Interactive Care, Social Media Care and Mobile Care) within the previous 12 months.

If you knew your customer service issue would be resolved via an Interactive customer service solution, which scenario sounds more appealing to you?††

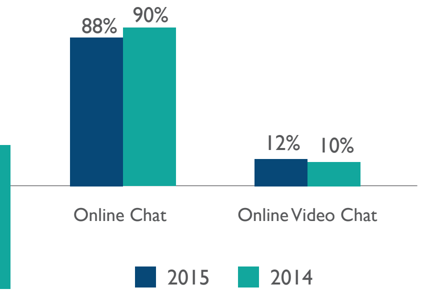


2015 survey results showed a decisive flip in consumer preference between finding a solution on their own versus finding a solution with the help of an advisor. In 2014, the majority of survey participants (53%) indicated a preference for finding a solution on their own. In 2015, this number dropped by 12%, down to 47%. Counter to this movement, the numbers of survey participants who would prefer the help of an advisor increased by 27%, moving from 44% in 2014 to 56% in 2015. This result is yet another proof point that speaks to a renewed consumer interest in interacting with a human rather than an automated or self-help system.

Consumer preference for online video chat was only slightly altered year over year. Like last year, males continue to be more open to online video chat compared to females, with 14% of males indicating they would be more likely to use the online video chat option, compared to only 10% of females. Furthermore, those ages 25–34 years continue to choose the "Online Video Chat" option at a higher rate than any other single demographic, with 21% indicating it as the option they would most likely use. The response of this same demographic came in at 20% in 2014.

Is there a benefit to either providing or growing Video Chat as a care option?

If a brand's customer service department offered both online chat and online video chat help options, which option would you more likely use?††



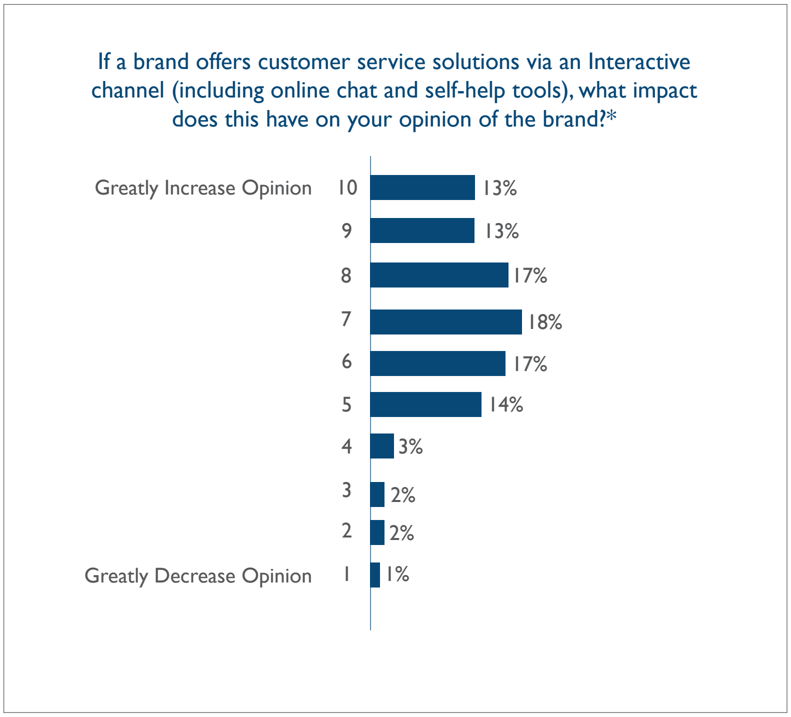
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.
††Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 239 online responses. Sample: National Adult Internet Population.

CHANNEL-SPECIFIC RESULTS

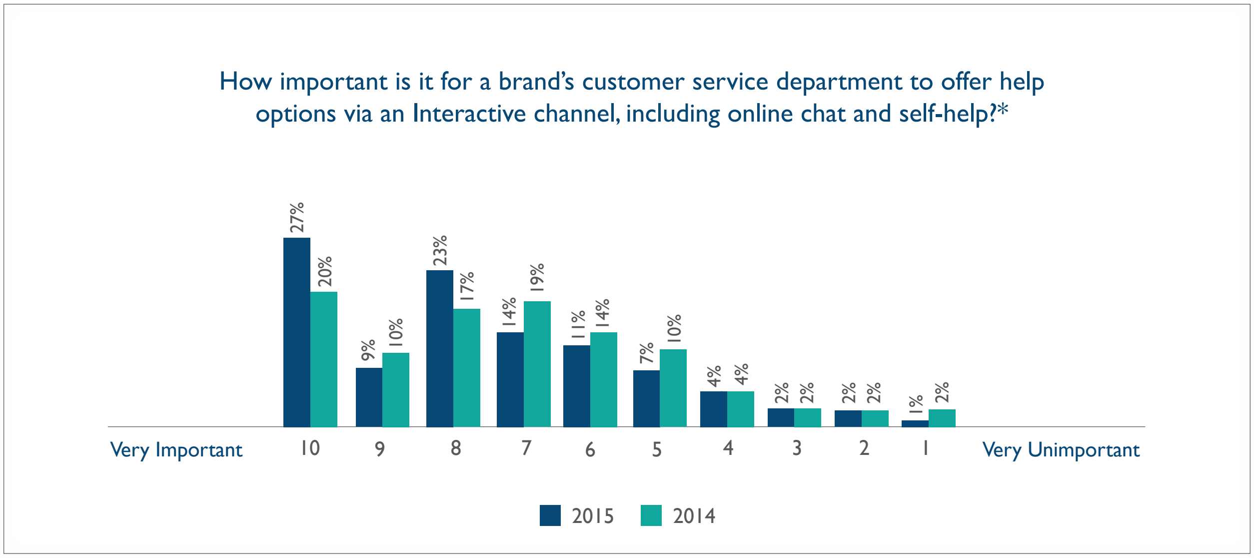
Interactive Care, cont.

INTERACTIVE CARE CHANNEL IMPRESSIONS

In 2014, respondents indicated a high likelihood of improved brand opinion when a company provided customer service solutions via the Interactive Care channel. In fact, the average response to the question at right was 6.7 in 2014. For 2015 results, this sentiment was further strengthened with an average response of 7.1, demonstrating the importance and influence of providing one or more Interactive Care solutions.



Consumer perception of the importance of an Interactive Care solution offering increased from 2014 to 2015, with an average response of 7.2 compared to 7.6, respectively. Furthermore, Interactive Care had the second highest average response to the question of importance in 2015 (again, 7.6), compared to 8.0 for Traditional Care and 7.2 for Mobile Care. These results reinforce the same conclusions that can be arrived at from the results above; Interactive Care is perceived as a vital customer care channel by consumers, second only to Traditional Care.



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 232 online responses. Sample: National Adult Internet Population.

INTERACTIVE CARE

Interactive Care (Online Chat, Video Chat, FAQ, and Self Help Tools) is the alternative channel used most by consumers, second only to Traditional Care.

Similar to Traditional Care, Interactive Care is commonly used as an "Issue Resolution Channel" with a 22% year-over-year increase in respondents who used the channel to resolve an issue. Therefore, **organizations should determine which interactive Care solutions are best suited for resolving issues, establish robust capabilities and direct transactions accordingly.**

Online Chat remains the most widely used solution among Interactive Care users, increasing slightly in 2015. The most significant change was Online FAQ, which declined by nearly 20% compared to 2014. **Brands should understand if they are seeing similar trends and determine if shifts are occurring because of consumer preferences and/or a greater ability to resolve issues among specific Interactive Care solutions.**

Satisfaction with Interactive Care continues to deliver better results when compared to Traditional and Mobile Care. The percentage of those who indicated dissatisfaction (with a rating of 1, 2 or 3) was 8% for Interactive, compared to 13% for both Traditional and Mobile. The percentage of those who indicated satisfaction (with a rating of 7, 8, 9 or 10) was 63%, almost 20 points higher than Traditional Care. **While higher satisfaction with Interactive Care suggests some learnings can likely be applied to other channels, there is still room for improvement to achieve higher levels of performance.** As covered in the Opinions Section, Interactive Care saw a decline when respondents were asked which channel provides the most convenience and highest likelihood to resolve an issue. **Organizations should determine if there are any differences in satisfaction levels between channels, identify opportunities for improvement (paying close attention to convenience and issue resolution) and apply any best practices that are appropriate.**

It is not surprising that "Getting the Issue Resolved" is the characteristic of most importance among users of Interactive Care. Interestingly, one of the characteristics that users of this channel care the least about when compared to other channels is "Friendly/Personalized Approach." **This means there is not a "one size fits all" approach to managing each channel and organizations should understand what is most important to their customers for each channel. This should be of major consideration when defining channel capabilities and requirements.**

In 2015, 27% more Interactive Care respondents said they would prefer the help of an agent over finding a solution on their own through self-help or other tools. This further illustrates the renewed consumer interest in interacting with a human rather than an automated or self-help system. **Brands should consider this trend when evaluating their current and future strategies and determine how easily Interactive Care users are able to interact with a person if needed.**

Overall, the data suggests having one or more convenient Interactive Care solutions is important to brand impressions, second only to Traditional Care. With some of the shifts among solution use (e.g. Online FAQ) in the channel, it is important for companies to fully comprehend how their customers are using (and want to use) this channel and how it fits into their multi-channel strategy. In addition, because Interactive Care is an important 'Issue Resolution' channel, companies need to understand levels of satisfaction, dissatisfaction and issue resolution rates and take action to improve.

SOCIAL MEDIA
CARE

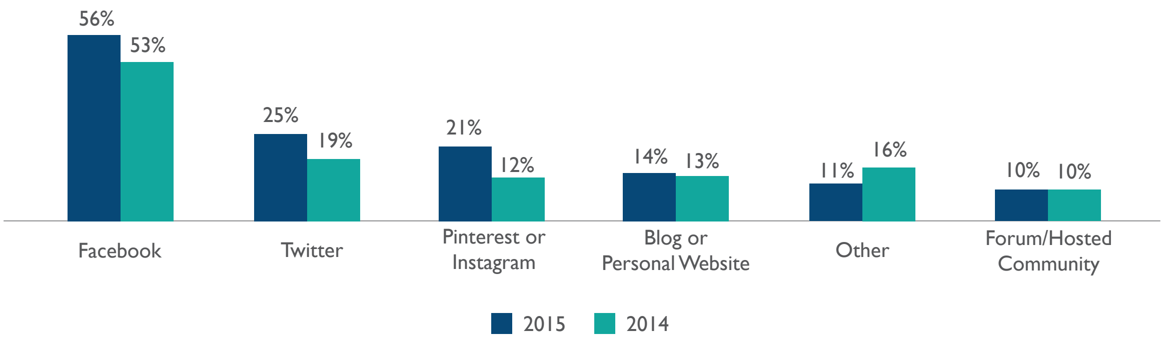
Social Media Care, much like the online communities that support the channel, have changed greatly over the past several years. Today, the most heavily trafficked sites for care interactions include Facebook, Twitter, Pinterest, Instagram and Forums.

COMMUNITIES USED AND REASONS FOR CONTACT

Facebook continues to lead when it comes to consumer/brand interactions, but the previous 12 months saw significant gains within Twitter (up 32%, moving from 19% utilization in 2014 to 25% in 2015) and Pinterest/ Instagram (up 75%, moving from 12% utilization in 2014 to 21% in 2015). Furthermore, while channel coverage is already fairly widespread for Twitter, as more brands move to adopt use of Pinterest and Instagram, it's expected that utilization rates within these channels will continue a path of growth.

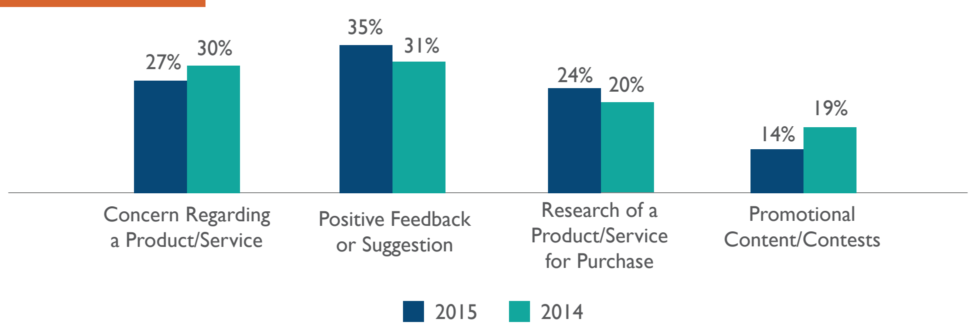
Do you know which social communities are right for your customers?

Within the past 12 months, in which social media communities have you had an interaction with a brand and/or customer service department? (Select all that apply)*



Are you analyzing the types of interactions that are occurring on social media, and are your engagement strategies accounting for this?

Within the past 12 months, which scenario best describes your reason for a social media interaction with a brand and/or customer service department?*



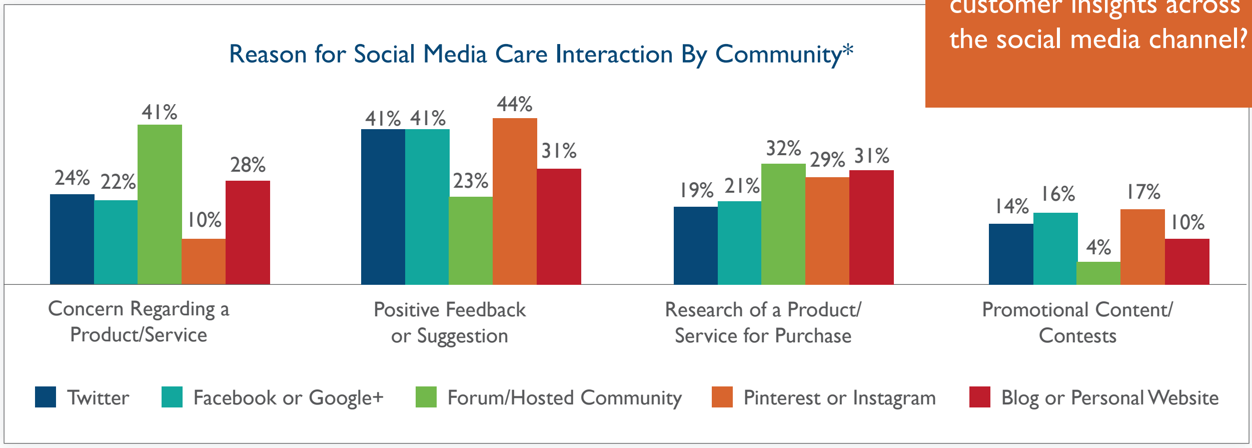
When we asked consumers to indicate the reasons why they interact with customer service, "Research of a Product/Service For Purchase" and "Positive Feedback or Suggestion" gained year over year. But on the whole, the ways in which consumers utilize the social media channel for customer service interactions remained consistent from 2014 to 2015.

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

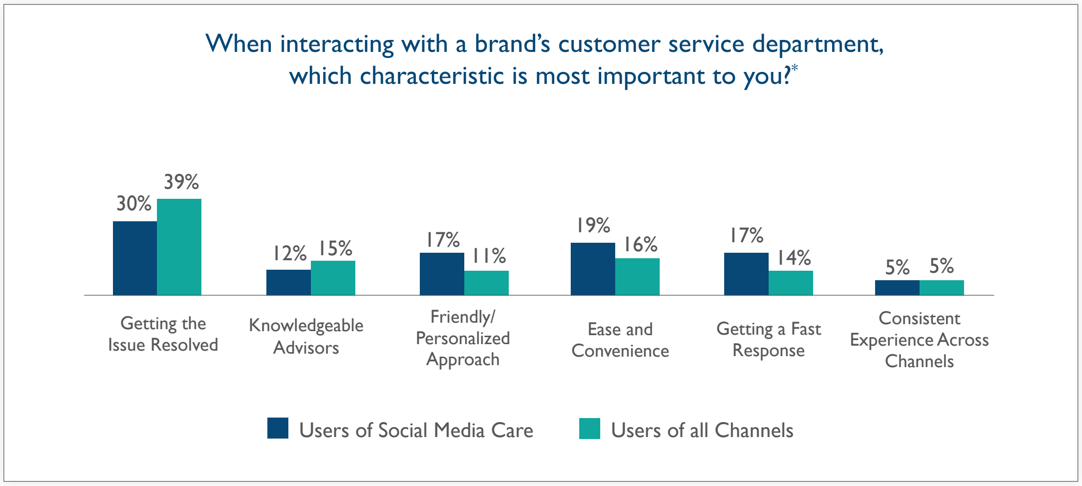
REASONS FOR CONTACT BY COMMUNITY AND CHARACTERISTIC OF IMPORTANCE

With the exception of Forums/Hosted Communities and Blogs/Personal Websites, the primary reason consumers look to social media for a brand interaction is to provide feedback and/or suggestions. As for the exceptions mentioned, use of Forums/Hosted Communities is almost evenly split between issue resolution and research, whereas Blogs/Personal Websites see a three-way tie between issue resolution, feedback and research.

Do you have the right tools in place to capture customer insights across the social media channel?



Users of the Social Media Care channel diverge from users of other care channels by placing a higher premium on three characteristics of care: "Friendly/Personalized Approach," "Getting a Fast Response" and "Ease and Convenience." Furthermore, only 30% of Social Media Care users indicated "Getting the Issue Resolved" as the most important interaction characteristic — the lowest result among respondents qualified by channel use. This result makes perfect sense, especially when considering the Social Media Care channel is mostly utilized for providing feedback or doing research, rather than addressing a product/service concern.

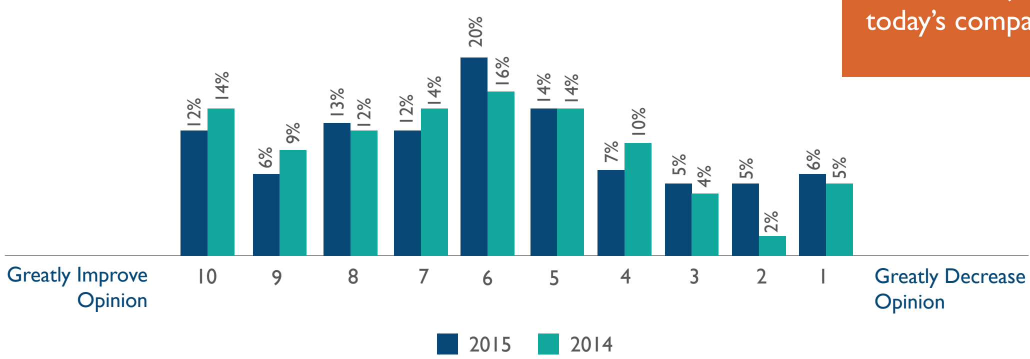


*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

REACTION TO PROACTIVE ENGAGEMENTS

From 2014 to 2015, the average response to the question below was virtually unchanged, moving <5% from 6.4 to 6.1. Consumers continue to indicate that a proactive engagement for the purpose of resolving a product/service concern results in a higher brand opinion than proactive engagement for the purpose of assisting in a purchase decision.

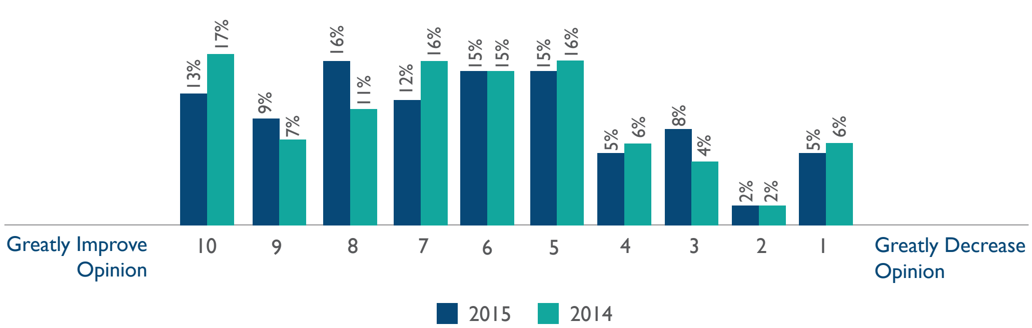
How would your opinion of a brand be affected by that brand proactively reaching out to you to assist in your purchase decision of a product/service within social media?*



Do you employ a proactive approach to social media, aligning with the majority of today's companies?

Similar to the results above, the average response to the question below saw a miniscule shift, moving <2%, from 6.5 to 6.4. Improving brand opinion continues to be more effective when proactive efforts are directed at resolving product/service concerns versus assisting in a purchase decision. This year, average response for proactive purchase assistance question was 6.1, compared to an average response of 6.4 for proactive efforts addressing product/service concerns.

How would your opinion of a brand be affected by that brand proactively reaching out to you regarding a product/service concern within social media?*



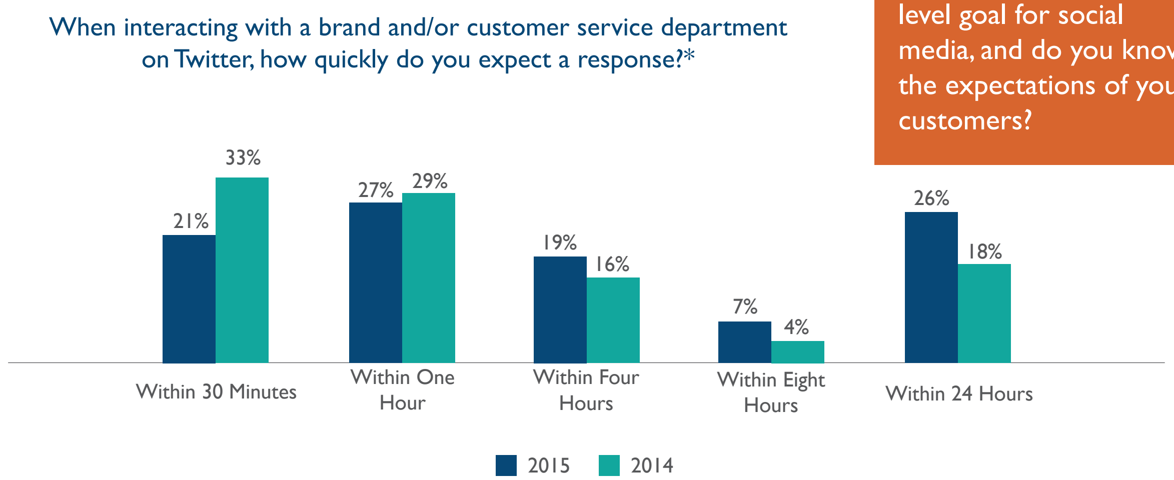
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

RESPONSE EXPECTATIONS

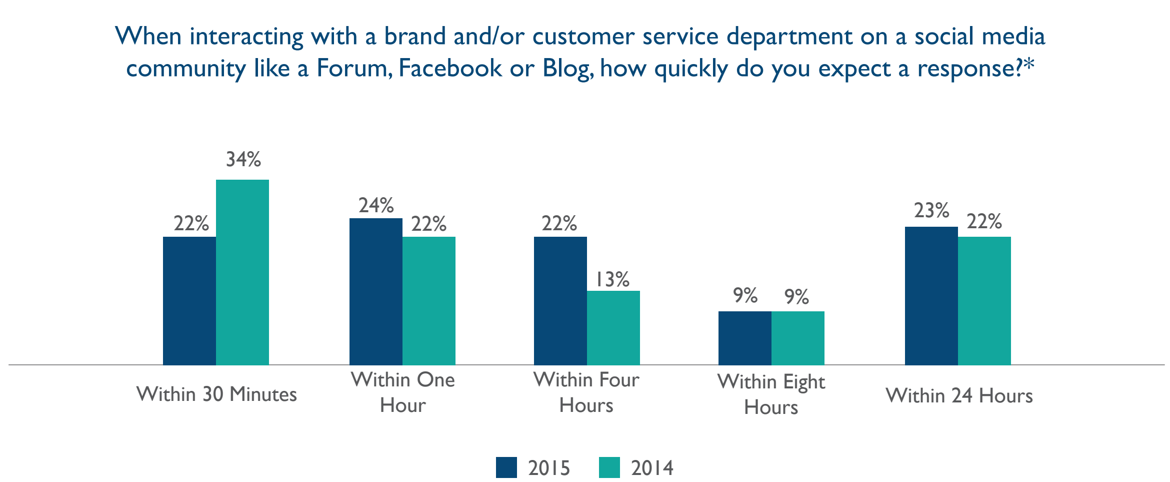
The topic of Social Media Care response time is fluid, and a universally accepted best practice has yet to be established. That said, there are some clues as to what consumers expect, although results continue to be influenced by the community in which the engagement is taking place.

Based on the results of this year's response expectation question (Twitter), the "Within One Hour" response has shown the strongest combination of year-over-year consistency and volume. While this result doesn't necessarily mean a response in under one hour as the new benchmark, it is certainly a reasonable starting point as care organizations examine their capabilities and set (or refine) service level targets. It's also worth noting that a response within one hour would meet the expectations of 79% of respondents.

Do you have a service level goal for social media, and do you know the expectations of your customers?



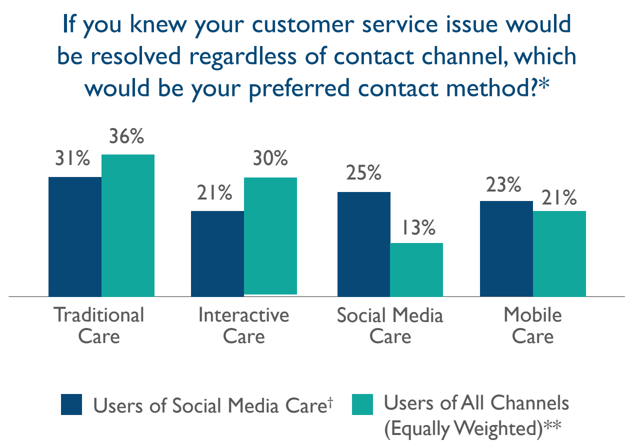
For social media communities that allow for slightly more complex communications (due to no character count restrictions), the picture is very similar. The primary difference is greater support at the "Within Four Hours" and "Within Eight Hours" levels. However, as with Twitter, brands should consider the "Within One Hour" mark as a starting point when developing their service level goals.



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

CHANNEL PREFERENCE AND LOYALTY

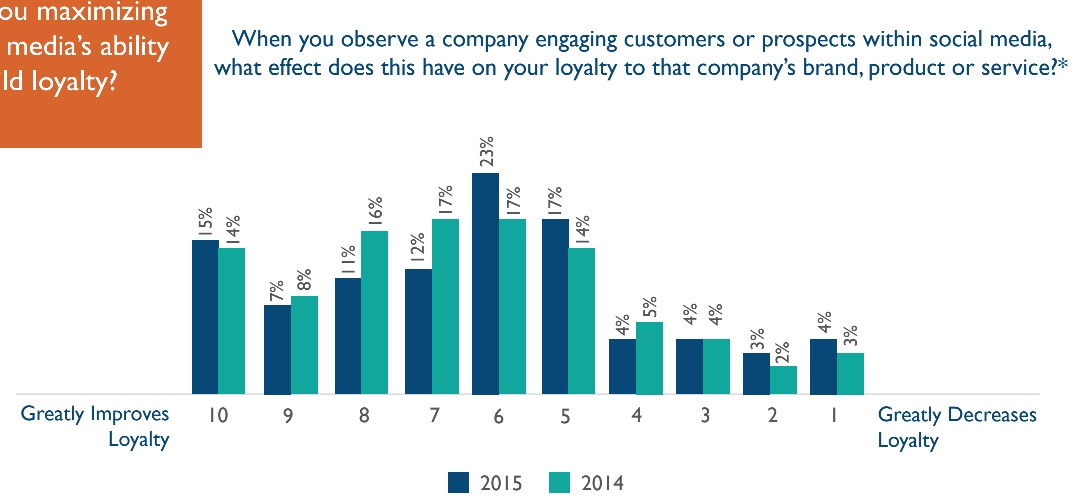
While it's true users of Social Media Care have more loyalty to the channel than the average user of customer service, Traditional Care still topped the results (31%) when we asked users of Social Media Care about their preferred contact method — assuming their issue would be resolved. This is worth noting since Social Media Care users were the only group of alternative channel users who preferred Traditional Care at a higher rate than the channel they qualified under. Comparatively, Interactive Care users preferred Interactive Care over Traditional Care (61% to 26%), and Mobile Care users preferred Mobile Care to Traditional Care (31.5% to 29.5%).



†"Users of Social Media Care" are confirmed users of one or more Interactive Care solutions within the previous 12 months. **"Users of All Channels (Equally Weighted)" is an equal weighting of results from confirmed users of each respective channel (Traditional Care, Interactive Care, Social Media Care and Mobile Care) within the previous 12 months.

Consumers continue to indicate a strong and positive influence on their loyalty when they observe a brand engaging customers and prospects within social media. In 2014, the average response to this question of loyalty (below) was 6.7, whereas the 2015 average response came in at 6.5, representing a year-over-year change of <3%. Since social media engagements are one to many, engaging in this space can be widely influential.

Are you maximizing social media's ability to build loyalty?



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 201 online. Sample: National Adult Internet Population.

CONCLUSIONS

SOCIAL MEDIA CARE

Social Media Care has evolved over the past few years, both in terms of adoption and how it is used as a function of care. As the channel continues to evolve, it is important to monitor use, preferences, expectations and experiences so organizations have greater insights as they work to integrate the Social Media Care into overall customer care strategies.

Facebook continues to be the dominant Social Media Care community for brand interactions. The most notable changes from 2014 were increased use among Twitter (up 32%) and Pinterest/Instagram (up 75%). The social media communities used by consumers varies depending on company, industry, etc., so it is **important for brands to do their due diligence to understand which social communities are right for their customers, and incorporate this understanding into their Social Media Care and multi-channel strategies.**

The reasons Social Media Care users interact with each community remained relatively unchanged when compared to 2014, with slight growth for "Research of Product/Service for Purchase" and "Positive Feedback/ Suggestion." This is contrary to Traditional Care and Interactive Care, which are both primarily used as "Issue Resolution Channels." The only outlier is Forums/Hosted Communities, which are used more for issue resolution than the other Social Media Care communities. When considering that almost all social communities are used for providing feedback/suggestions, **there is opportunity within this channel to mine valuable customer insights, utilizing that data to improve the customer experience. In addition, it is important to understand how each community is used, and direct interactions to the most appropriate resources.**

While "Getting the Issue Resolved" is the most important characteristic for this channel, it did not rate as high as the other channels. Social Media Care users place greater importance on "Friendly/Personalized Approach," "Getting a Fast Response," and "East and Convenience" when compared to other channels. **This reiterates the importance of understanding the needs and expectations of each channel when developing the processes and strategies to support them.**

The question of "what is an appropriate service level (or response time) for Social Media Care continues to be a topic of conversation among customer care professionals. The data from this research suggests responding within one hour would meet expectations of the majority of users. **However, when establishing service level targets for any channel, businesses should understand their customers' expectations and set targets accordingly.**

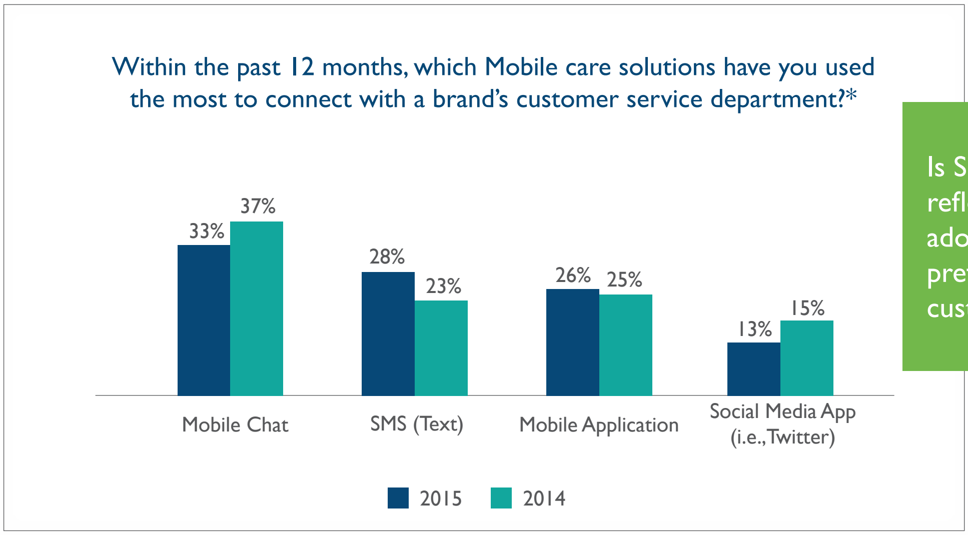
Overall, Social Media Care users are loyal to their channel, but most said they would prefer Traditional Care if they knew their issue would be resolved. Once again, this confirms the importance that Traditional Care brings to a multi-channel strategy, and the need for Social Media Care to be integrated into the strategy effectively. Engaging customers through social media has a positive effect on brand loyalty. Considering the "one to many" aspect of the medium, companies would be wise to try to maximize this channel to drive higher levels of consumer loyalty.

MOBILE
CARE

Mobile Care continues to evolve rapidly with the constant introduction of new and powerful applications and technologies. Primary Mobile Care channel solutions include SMS (Text), Mobile Applications and Mobile Chat.

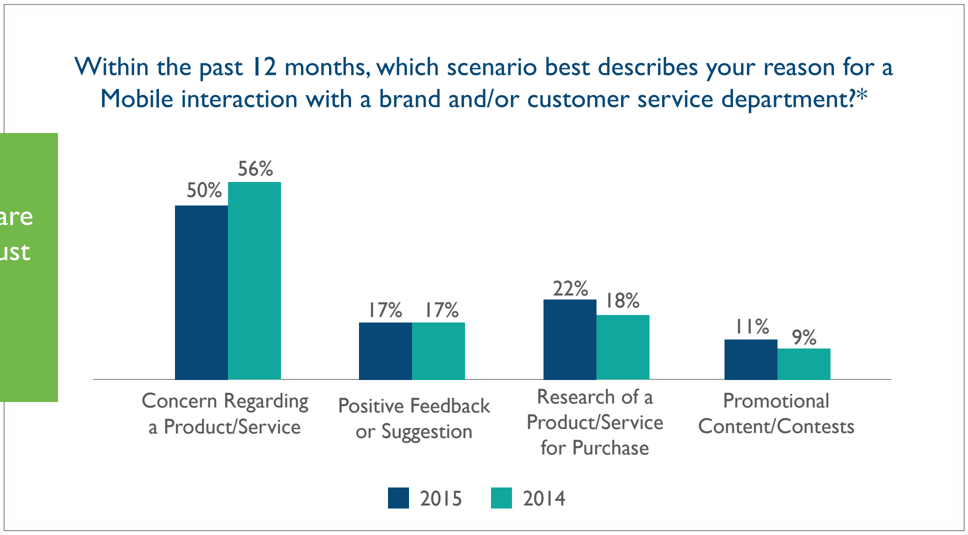
SOLUTION USE AND REASONS FOR CONTACT

Across Mobile Care channel solutions, Mobile Chat saw the largest year-over-year decline (-11%), while SMS (Text) experienced the largest year-over-year increase (+22%). Furthermore, Social Media App usage saw a 13% decline on a percentage basis, although the year-over-year shift was nominal, at only 2%. Mobile Application use was relatively unchanged.



Is SMS growing as a reflection of corporate adoption or consumer preference? Are your customers using SMS?

Do your Mobile Care solutions have robust issue resolution capabilities?



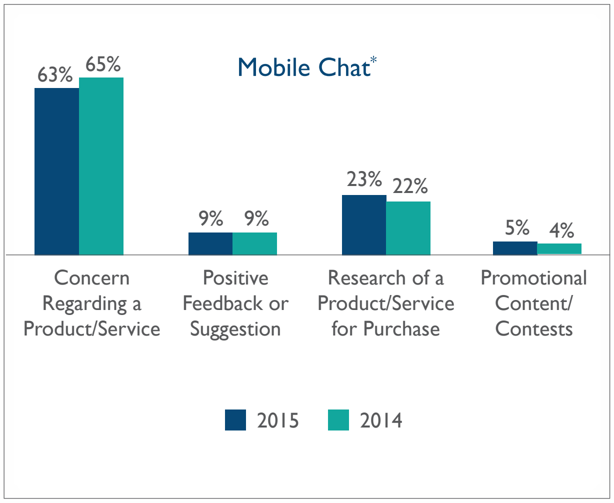
The mix of reasons consumers utilize the Mobile Care channel (above) were without significant, year-over-year change. Issue resolution ("Concern Regarding a Product/Service") continues to dominate the mix, with product/service research and feedback/suggestion each running a distant second.

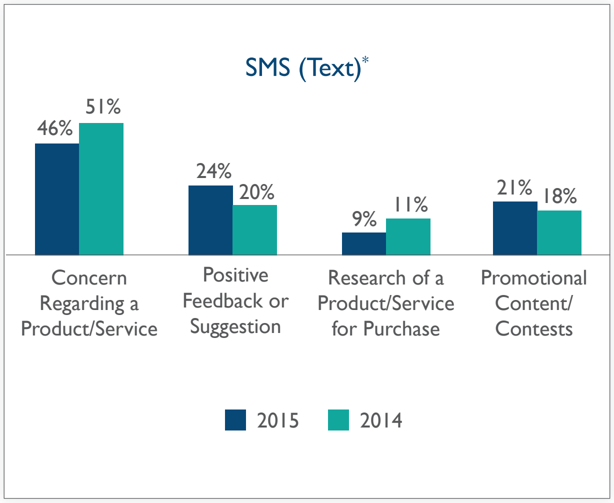
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 212 online responses. Sample: National Adult Internet Population.

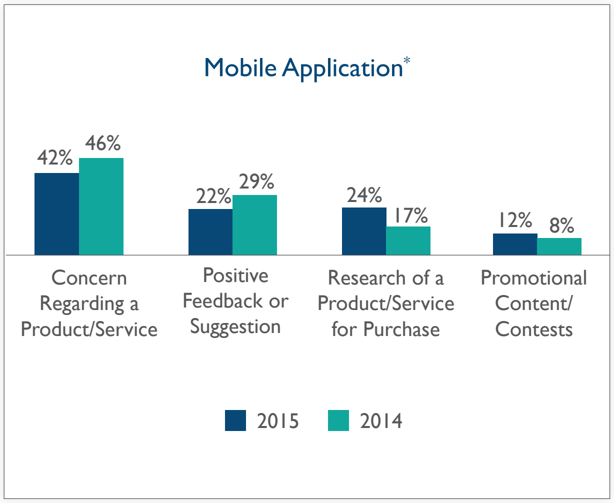
REASONS FOR CONTACT BY SOLUTION

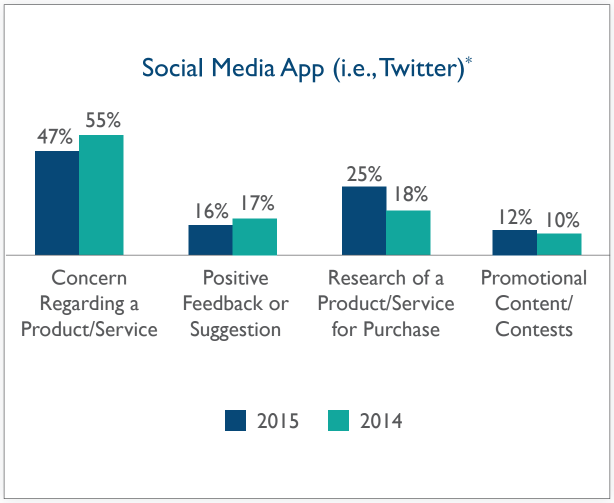
As illustrated on the previous page, consumers are directing the majority of their Mobile Care interactions toward resolving product/service concerns. When we examine the Mobile Care channel solution by solution, this picture remains unchanged, although Mobile Chat is most strongly rooted in the role of issue resolution.

One other development worth consideration is the increase in the "Research of a Product/Service for Purchase" among Mobile Application and Social Media App solutions. In combination with an upcoming finding (bottom of page 58) that shows consumers are still open to receiving product information via mobile apps, brands should consider how to best utilize these channels, both to inform and generate revenue.









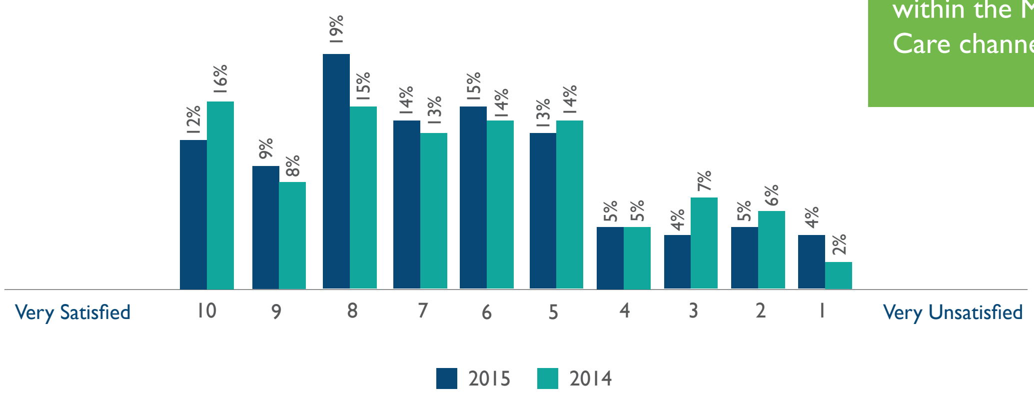
*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 212 online responses. Sample: National Adult Internet Population.

SATISFACTION AND CHARACTERISTICS OF IMPORT

Consumer satisfaction for Mobile Care improved just slightly year over year, continuing to deliver better results than Traditional Care, but not as good as those of Interactive Care. The percentage of those who indicated dissatisfaction (with a rating of a 1, 2 or 3) was 13%, the same as Traditional Care. The percentage of those who indicated satisfaction with Mobile Care (with a rating of 7, 8, 9 or 10) was 54% for 2015, a result ten points higher than Traditional Care, but almost ten points lower than Interactive Care.

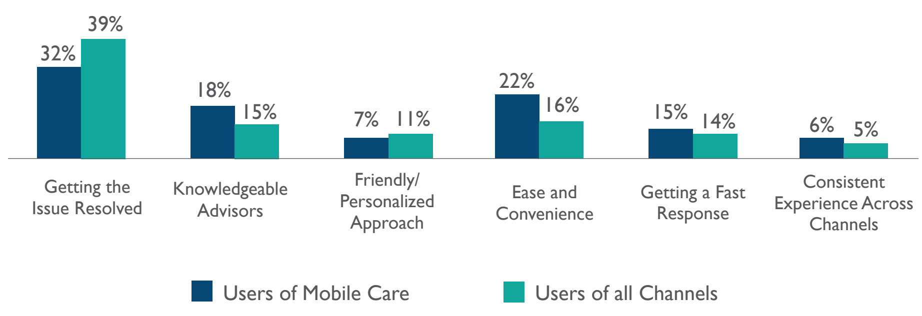
Are you developing processes to tackle specific CSAT issues within the Mobile Care channel?

Within the past 12 months, what was your typical level of satisfaction with a brand's customer service department interaction via a Mobile Care solution?*



Users of Mobile Care place less value on "Getting the Issue Resolved" and "Friendly/Personalized Approach" compared to the combined results of users of all channels (-15% and -36%, respectively), with "Ease and Convenience" showing the most significant differential (+31%). Businesses should pay special attention to the consumer's desire for ease and convenience, especially as many rethink and redesign first- and second-generation mobile applications with the intent of providing greater functionality and an improved user experience.

When interacting with a brand's customer service department, which characteristic is most important to you?†

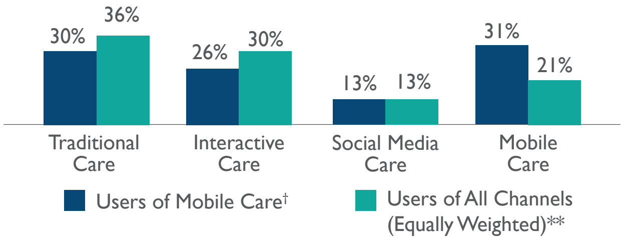


*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 213 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 239 online responses. Sample: National Adult Internet Population.

PREFERRED CHANNEL OF CARE, RESPONSE EXPECTATIONS AND RECEPTION TO APP CONTENT

When we asked users of Mobile Care about their preferred contact method, they indicated an even split between Mobile Care (their channel of qualification) at 31%, and Traditional Care at 30%. Mobile Care users also indicated Interactive Care at 26%, an elevated rate that was very competitive with their other top two choices.

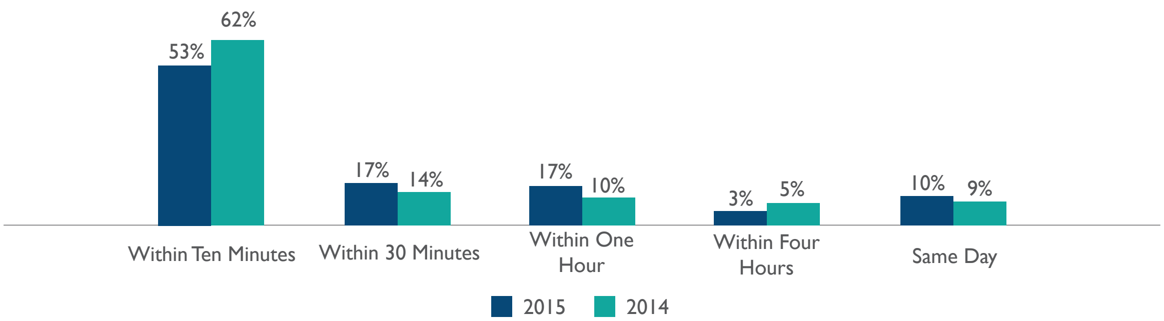
If you knew your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method?*



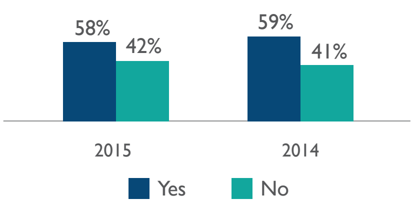
†"Users of Mobile Care" are confirmed users of one or more Interactive Care solutions within the previous 12 months. **"Users of All Channels (Equally Weighted)" is an equal weighting of results from confirmed users of each respective channel (Traditional Care, Interactive Care, Social Media Care and Mobile Care) within the previous 12 months.

Similar to last year's results, consumers continue to expect a very quick response time when interacting with a live person via a Mobile Care solution. While fewer individuals selected the quickest response option, "Within Ten Minutes," when compared to 2014 results, the option was still preferred more than three to one over any other option. This means that even if businesses are able to respond within 30 minutes, they will only be able to meet the expectations of 47% of survey respondents.

When interacting with a brand's customer service department via a Mobile Care solution requiring a human response, how quickly do you expect that response?††



If a brand offered a Mobile Care app that was helpful to you, would you be open to receiving information about new products and services as a part of that app?*



Consumers continue to remain mostly open to receiving information about new products and services via Mobile Care apps. This result, like the characteristics of importance results on the previous page, should give companies something to consider as they work to develop next-generation mobile applications.

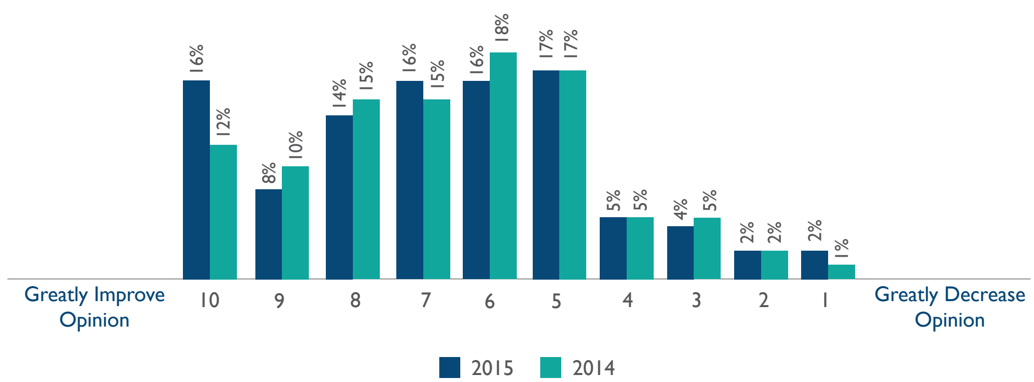
Are you working closely with your marketing counterparts to provide compelling Mobile App content?

*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 213 online responses. Sample: National Adult Internet Population.
††Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 212 online responses. Sample: National Adult Internet Population.

MOBILE CHANNEL IMPRESSIONS

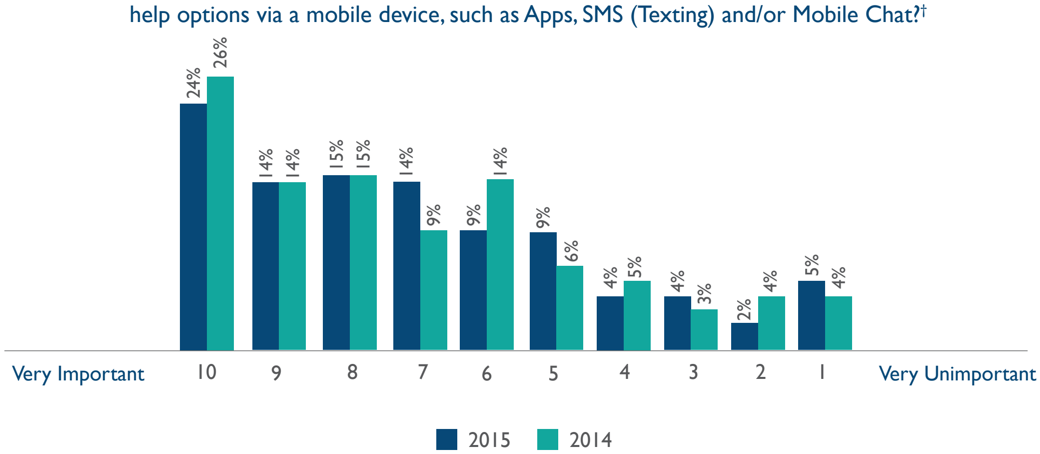
When we asked consumers how their impression of a brand might be influenced if that brand began offering Mobile Care solutions, the average response in 2015 was precisely the same as it was in 2014, standing at 6.7. For comparison's sake, we asked a similar question of Interactive Care users, and their average response was 7.1, up from 6.7 in 2014. While these results might suggest that consumers find Interactive Care solutions more impressive, it's clear that offering solutions in either channel can have a definitive and positive effect on brand opinion.

If a brand begins offering a Mobile Care solution, including an App, SMS (Text) or Mobile Chat, what impact does this have on your opinion of the brand?*



Just like the results concerning brand opinion (above), results around the perceived importance of a Mobile Care channel offering were exactly unchanged year over year. Both this year and last, the average response to the question was 7.2. In the same mode, this question was also asked of Interactive and Traditional Care users. Each of those results saw a higher average response compared to Mobile Care, with Interactive Care registering a 7.6 and Traditional Care registering an 8.0. Not to diminish the importance of a Mobile Care offering, as it is a fairly new and growing channel, but in comparison, consumers clearly place greater importance in both Interactive and Traditional Care channel offerings.

In your opinion, how important is it for a brand's customer service department to offer help options via a mobile device, such as Apps, SMS (Texting) and/or Mobile Chat?†



*Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 212 online responses. Sample: National Adult Internet Population.
†Methodology: Conducted by Google Consumer Surveys, June 3, 2015 – June 5, 2015 and based on 244 online responses. Sample: National Adult Internet Population.

MOBILE CARE

Organizations are increasingly integrating Mobile Care solutions into their multi-channel strategies, with some companies already deploying second- and third-generation solutions. Given the pace in which Mobile Care is evolving, it is more important than ever to understand how and why consumers use the channel, as well as specific consumer preferences.

Of the Mobile Care solutions (Mobile Chat, SMS (Text) and Mobile Apps), Mobile Chat declined the most year over year, while SMS (Text) increased the most. Our research doesn't provide a clear indication for the shift, but might be revealing a trend. That said, **businesses should seek to explore channel preferences within their own organizations, and attempt to understand the cause of those preferences.**

The reasons Mobile Care users interact with the channel remained relatively unchanged compared to 2014, with Issue Resolution ("Concern Regarding a Product/Service") remaining the primary reason. Among Mobile Care solutions, Mobile Chat remains as the most utilized channel for Issue Resolution, even though overall use of Mobile Chat declined. **It is unclear if Mobile Chat declined because consumers are able to use other, more convenient solutions for issue resolution, but organizations should determine if they are seeing a similar shift within their organizations, and try to understand the underlying causes. Most importantly, they need to determine which Mobile Care solutions are most preferred by their customers, and which are best suited to resolve issues.**

Also of interest is the increased use of Mobile Apps and Social Media Apps for "Research of a Product/Service for Purchase." Close to 60% of survey respondents are open to receiving information about new products and services via Mobile Apps. **This indicates brands may have an opportunity to promote products/services through these solutions to inform and generate revenue.**

Satisfaction with Mobile Care improved just slightly year over year, continuing to deliver better results than Traditional Care, but not as strong as Interactive Care. The percentage of those indicating dissatisfaction (with a rating of 1, 2 or 3) was 13% (the same as Traditional Care). The percentage of those indicating satisfaction (with a rating of 7, 8, 9 or 10) was 54%, 10 points higher than Traditional Care, but almost 10 points lower than Interactive Care. While "Getting the Issue Resolved" is the most important characteristic for this channel, "Ease and Convenience" is significantly higher compared to other channels. As covered in the Opinions section, when users of customer care were asked what channel provides the most convenience and highest likelihood to resolve an issue, Mobile Care was picked by the fewest number of participants. This shows there is still much work to be done in this evolving channel. As companies refine their Mobile Care strategies, again they **need to understand their customers' level of satisfaction, what is driving it, take actions to improve CSAT and deploy solutions designed to solve issues with greater ease and convenience.**

As brands continue to deploy Mobile Care solutions and refine existing strategies, it is critical to understand how Mobile Care should be integrated into their customer care strategies based on their customers' use and expectations of the channel. Consumers are clearly using this channel to resolve issues, so Mobile Care solutions need to be well thought out with robust and convenient issue resolution capabilities.

ADAPTING TO CUSTOMERS' NEEDS IN A MULTI-CHANNEL ENVIRONMENT

Aaron McMillan, Managing Director, Quality Services, Applications & Refunds
United Airlines

As interactive, mobile and social channels become more prevalent in today's customer care environment, preference among consumers to use non-traditional channels is surprisingly lacking. Sixty-five percent of consumers in the Consumer Edition of 2015 Customer Experience Management Benchmark Study indicate they prefer to use a traditional contact channel; such as phone, email, or in-person, if they knew their issue would be resolved.

At United, we prioritize and focus on overall customer satisfaction at both the corporate and agent levels. However, we also measure resolution from the perspective of the customer based on the outcome of their interaction. Among a short list of key drivers of overall satisfaction, resolution is the most highly correlated attribute and a continual focus for our organization. As our non-traditional channels grow in customer usage for transaction servicing we see an ever-increasing shift in the types of traditional contacts we receive where more and more are centered around issue and problem solving that simply aren't enabled in a non-traditional channel. The dynamic shift we have seen in contact types over the past few years has highlighted the need for us to strike a better balance between customer service soft skills while simultaneously resolving customer issues.

One way we're adapting to better meet our traditional-channel customers' shifting needs is a greater focus on soft skills training. We are now in our third year of conducting extensive customer service training and, over the same time period, we have also seen overall customer satisfaction improve 10 points and resolution rates improve 7 points for our Premier customers in our contact centers.

As noted in the benchmark study, sixty-eight percent of consumers indicate that traditional contact channels provide the highest likelihood of resolving their issue. This data point would suggest that non-traditional channels still have a lot of untapped potential for functional improvements that better meet customer needs. Within the Customer Contact Center division at United we partner very closely with other leaders who manage our digital channels to collaborate on opportunities for increased self-service and resolution, which has resulted in a 10% reduction in traditional contact volume over the past three years.

Nearly two-thirds of consumers attempt a multi-channel approach for customer care engagements yet, as mentioned; a similar amount still prefers a traditional channel so another opportunity may exist for many customer care organizations to further define their channel strategy. By better defining what contacts are best suited for being handled within specific channels we can better anticipate customer needs and more easily allow them to transition from one channel to another without starting over, ultimately reducing customer effort. While we are early in this work, we have created a forum with our internal business partners to begin discussing the process of journey mapping our customers' interactions and touch points so we can further define our own strategy. This process, combined with ongoing data analysis to understand our customers' channel usage, preference, and issue resolution opportunities, will be critical to truly delivering a seamless and improved experience across channels.

Aaron McMillan has been with United Airlines since 1997, having served in many capacities. In his current role, he is responsible for United Airlines' global vendor strategy and operating plan, overall quality of customer contact center disciplines and he works with quality and customer satisfaction stakeholders to ensure rigorous measurement and analysis of performance. He is the global lead on systemic improvements, responsible for developing methods to capture meaningful and actionable intelligence about customer interactions via the company's automated call monitoring and analytical tools. Much of Aaron's focus has been on quality and customer satisfaction improvements, having led the development and execution of contact center customer satisfaction research across both United Airlines and Continental Airlines. His efforts have produced results such as a 35% decrease in dissatisfaction. Aaron has a Bachelor of Science in Aviation Management from Oklahoma State University. He is also a 6-Sigma Green Belt.

METHODOLOGY

Google Consumer Surveys reports on the inferred age and gender of anonymous respondents based on the websites users visit, as well as their location based on IP addresses. Income and urban density are then approximated using census data for particular geographic regions. Inferences, as they relate to these categories, may not be available for all survey participants.

In a recent white paper comparing a probability-based Internet panel, a non-probability-based Internet panel and Google Consumer Surveys, it was found that Consumer Surveys provide higher accuracy on three separate measures: average absolute error (distance from the benchmark), largest absolute error and percent of responses within 3.5 percentage points of the benchmarks. These results suggest that, despite differences in survey methodology, Google Consumer Surveys can be used in place of more traditional Internet-based panels without sacrificing accuracy.

Please note that it's possible that Google Consumer Surveys may mis-categorize people. For example, if someone visits websites that are usually frequented by younger people, they may be categorized as younger than their actual age. Similarly, if a household uses a shared computer, we may categorize that "user" based on the combined interests of the household.

Provided the complexities of participant screening questions through the study's body of surveys, we present un-weighted findings. When targeting an audience representing the U.S. Internet population, Google Consumer Surveys attempts to find respondents that match the distribution of people in the U.S. by age, gender and location as reported in the U.S. Census Current Population Survey (CPS). When outliers were observed in the data as they relate to the inferred age, income, gender and urban density, we made an effort to highlight these findings.

*Comparing Google Consumer Surveys to Existing Probability and Non-Probability Based Internet Surveys: http://www.google.com/insights/consumer surveys/static/consumer_surveys_whitepaper.pdf

ABOUT THE STUDY'S AUTHORS

Execs In The Know

For over 15 years, Execs In The Know has built a reputation of excellence in the Customer Management Industry and a worldwide community of over 50,000 Customer Experience Professionals. Execs In The Know connects people to engaging industry content, thought leadership, current trends, peer-to-peer collaboration, networking and industry employment opportunities. Examples of this can be seen at their Customer Response Summit events, roadshows, webinars, workshops, Blog Talk Radio segments, Industry Benchmarking Series, blogs, thought papers and social communities.

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