OPTIMISING CUSTOMER EXPERIENCE IN INDIA & SOUTH EAST ASIA

DELIVERING TO THE NEEDS OF THE CONNECTED MULTI-CHANNEL CONSUMER

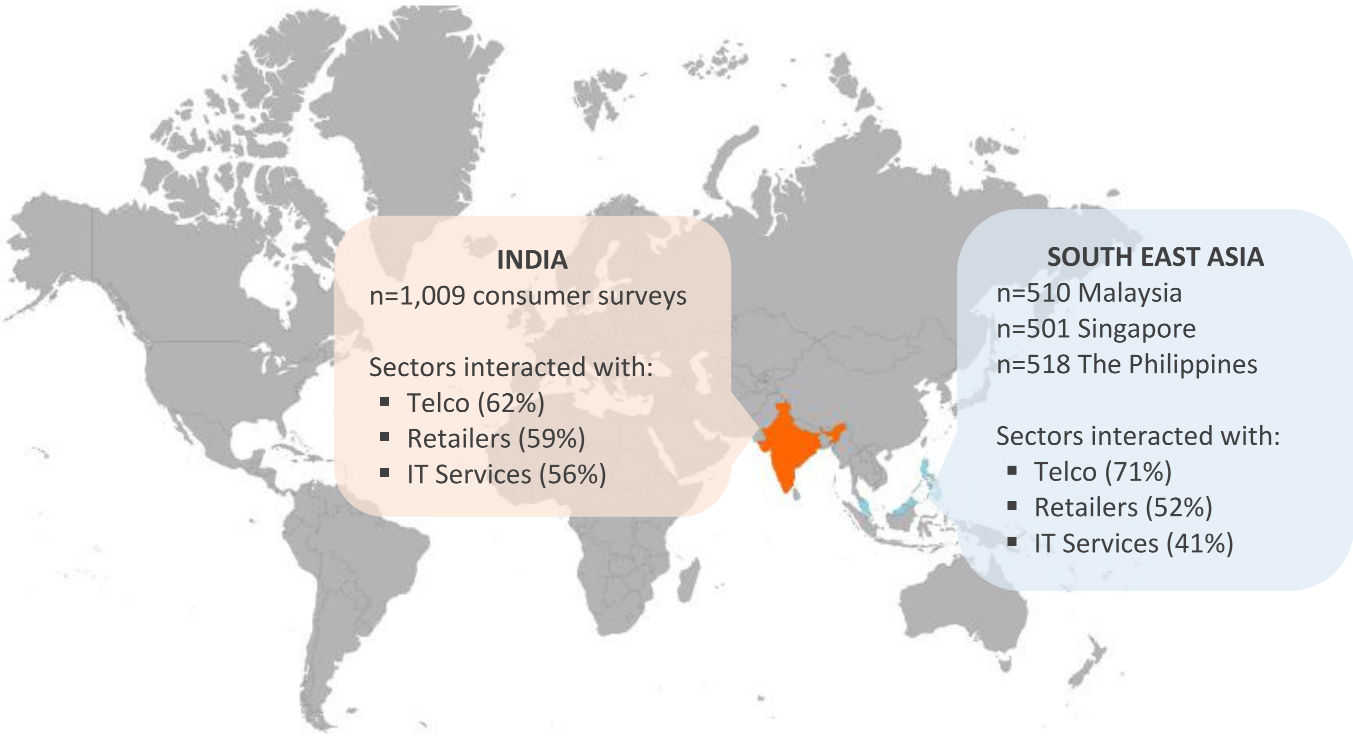
FIFTH QUADRANT

Contents

1. Methodology

This paper was written by Fifth Quadrant in collaboration with LogMeIn. The research and analysis contained herein is based on original, independent research undertaken by Fifth Quadrant.

Fifth Quadrant carried out an online survey of 2,538 consumers across India, Malaysia, Singapore and The Philippines in November to December 2015. Consumers were asked about a recent interaction they had with a telecommunications, retail (with an online presence) or IT and computer services organisation in the past 3 months. Specifically the surveys reviewed the importance of customer service in keeping customers loyal, and customers' multi-channel usage, experience and expectations.

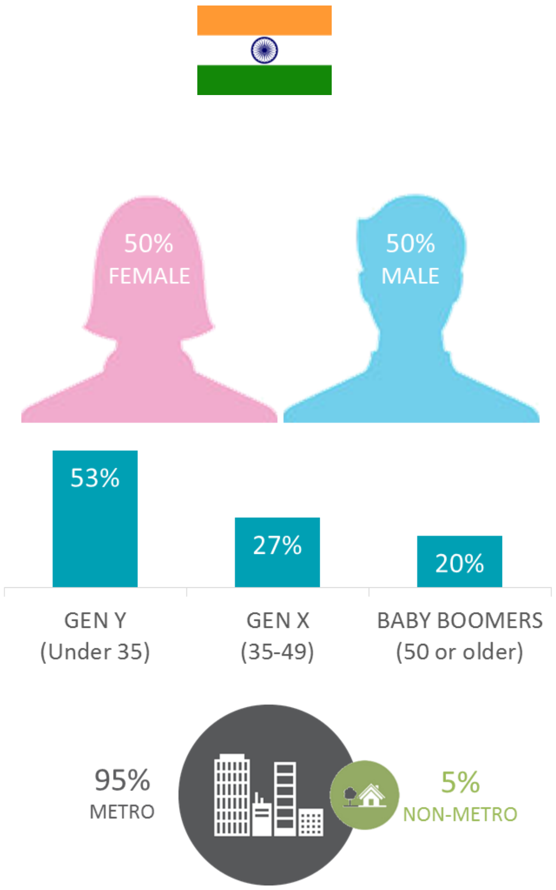


2. Respondent Demographics

A robust sample was surveyed consisting primarily of metropolitan consumers with a representative coverage of gender and age brackets.

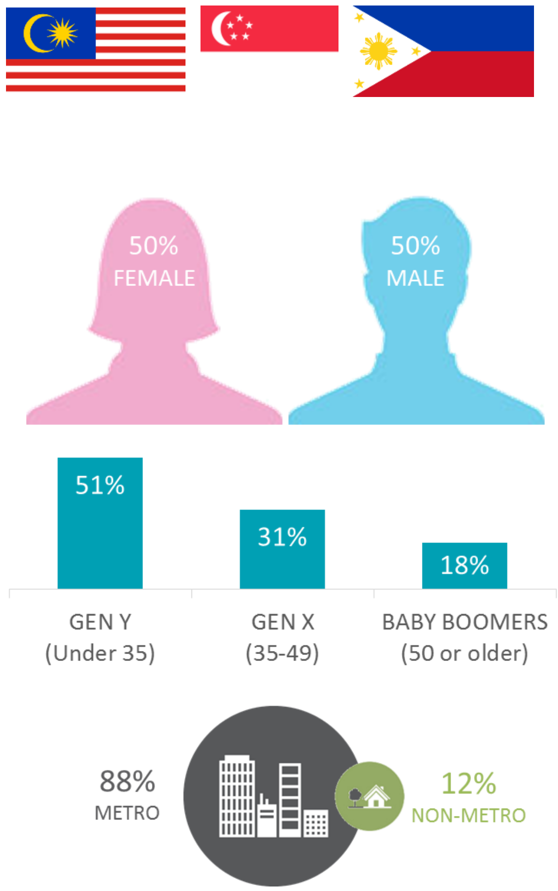
INDIA

(n=1,009)



SOUTH EAST ASIA

(n=1,529)



3. Introduction

In the new era of the consumer, organisations are managing the challenges of delivering a consistent, seamless and personalised experience across multiple channels and devices. Consumers have high expectations of service providers and will switch if an organisation does not meet those expectations.

While organisations understand the importance of customer experience, they face challenges in determining the appropriate channel mix for different query types and delivering a fast and effective resolution across channels.

By understanding the drivers of customer satisfaction and investing in the appropriate resources and technologies, organisations can better service customers and improve loyalty and advocacy.

4. Summary of Findings

- It is critical for organisations to deliver a great experience to consumers as it has a direct impact on future behaviour. Over seven in ten consumers in India and South East Asia claimed to have stopped doing business with an organisation or actively advised family and friends to avoid an organisation following a bad experience. Organisations need to pinpoint the cause of consumer dissatisfaction and make changes to improve retention and recommendation behaviour.

- Consumers typically begin their journey by using online channels to search for information before progressing through other channels to complete their query. Half the consumers surveyed indicated they used an online channel first, followed by a third that used a mobile channel first. Organisations need integrated systems to track the customer's history across channels in order to deliver a seamless experience.

- As the usage of online and mobile channels increases further, organisations must be ready to handle interactions more efficiently and provide faster resolution, as there is currently a high number of interactions required before a query is resolved. A high volume of interactions leads to greater consumer dissatisfaction as the delay to query resolution is extended.

- Online chat is a promising channel for consumer interactions. It can also be used on mobile devices, using links from a mobile application or site, and agents can link consumer web behaviour within a chat interaction so agents are more readily aware of particular behaviours. Agents are able to multi-task providing greater efficiency and better management during busy periods, resulting in faster response times for the time poor consumer.

- Consumers are most frustrated with the time taken to reach the right representative and resolution time. Consumers have seen a lower level of improvement in these issues over the last 12 months. Long hold times and complicated automated service menus continue to irritate consumers who are keen to get fast resolutions to their problems. This explains why many are turning to online channels for their queries, with half of all consumers surveyed using these channels first when they have a query.

- Consumers are willing to share more personal information and connect their devices at home to the Internet as long as it delivers a faster and more effective query resolution, in a personalised and seamless manner. This presents an opportunity for organisations to look into new technologies such as Internet of Things and Remote Support to assist with quicker response times and resolution.

5. Key Research Findings

Poor consumer experiences have a direct impact on loyalty and advocacy

Thanks to the Internet, and particularly social media, consumers are better informed about the products and service capabilities of organisations, both locally and globally. The result is that consumers have more power in choosing which companies they wish to do business with. It is critical for organisations to fully understand the market and customer behaviour, in order to determine which factors drive choice and loyalty for their market and business.

Over seven in ten of the surveyed consumers have stopped doing business with an organisation after a bad experience. But it does not stop here, a similar proportion of consumers have actively advised friends and family to avoid an organisation following a poor experience. This demonstrates the importance of customer service to organisations, with a direct impact seen on consumer loyalty and advocacy.

Organisations need to ensure that consumers are truly getting the service they expect, by understanding them and their channel requirements, and pinpointing the cause of any dissatisfaction, in order to make changes and improve customer retention and positive recommendation.

7 IN 10 CONSUMERS LEAVE AFTER ONE BAD EXPERIENCE

Figure 1
Have you ever stopped doing business with a company following a bad customer experience?

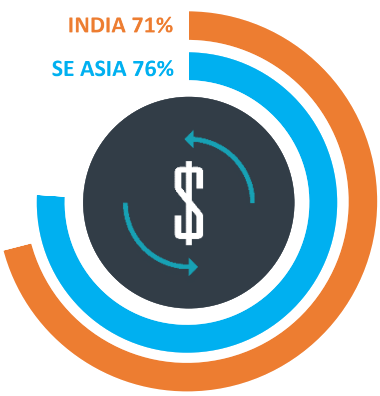
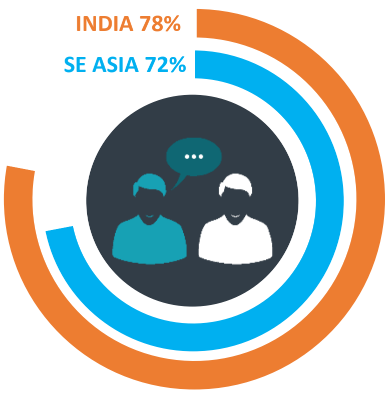


Figure 2
Thinking about your individual experiences, how much do you agree or disagree with: I actively advise my friends/family to avoid businesses that give me poor customer service?



Consumers are increasingly turning to online and mobile channels for answers first

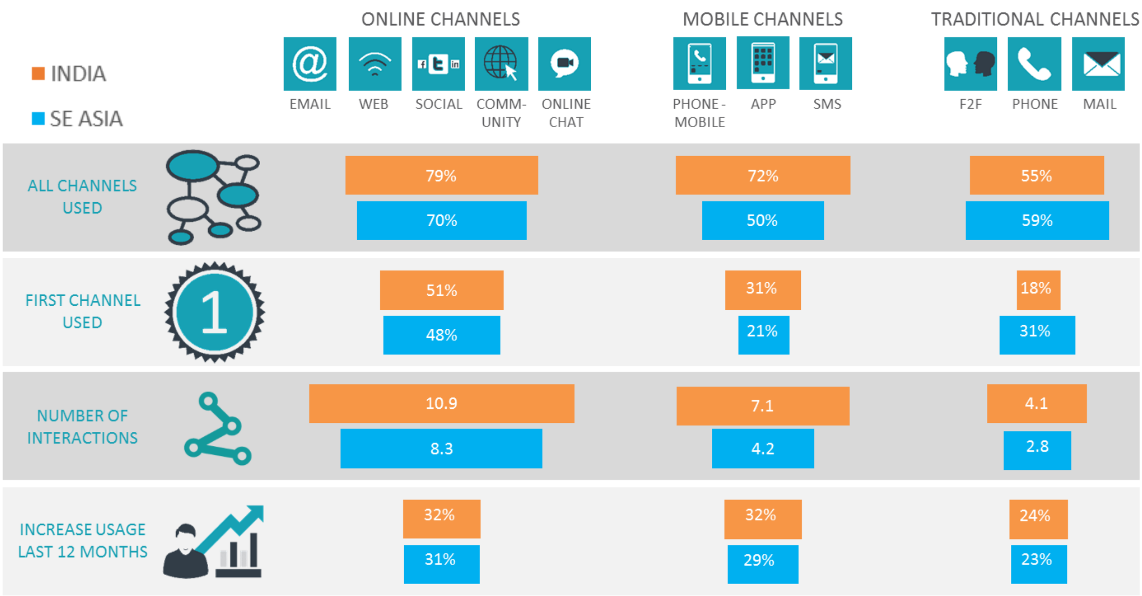
The consumer journey typically begins with either the online or mobile channel first before they progress to other channels. The reasons for first channel choice is the speed of response and convenience to access at home or work, compared to traditional channels.

On average, consumers use three channels to resolve their query. Ideally consumers should find the answer to their question through their channel of choice without the need to switch to alternative channels.

Furthermore, the research found that online and mobile channels involve an even greater number of interactions, requiring a higher level of customer effort to resolve queries and potentially impacting customer satisfaction.

Organisations need to focus on improving the efficiency and effectiveness of their channels, especially for online and mobile channels as these are the growth channels indicated by consumers. This can be achieved by ensuring a single complete view of the customer that combines customer information with their interaction history.

Figure 3
Channel Usage Summary

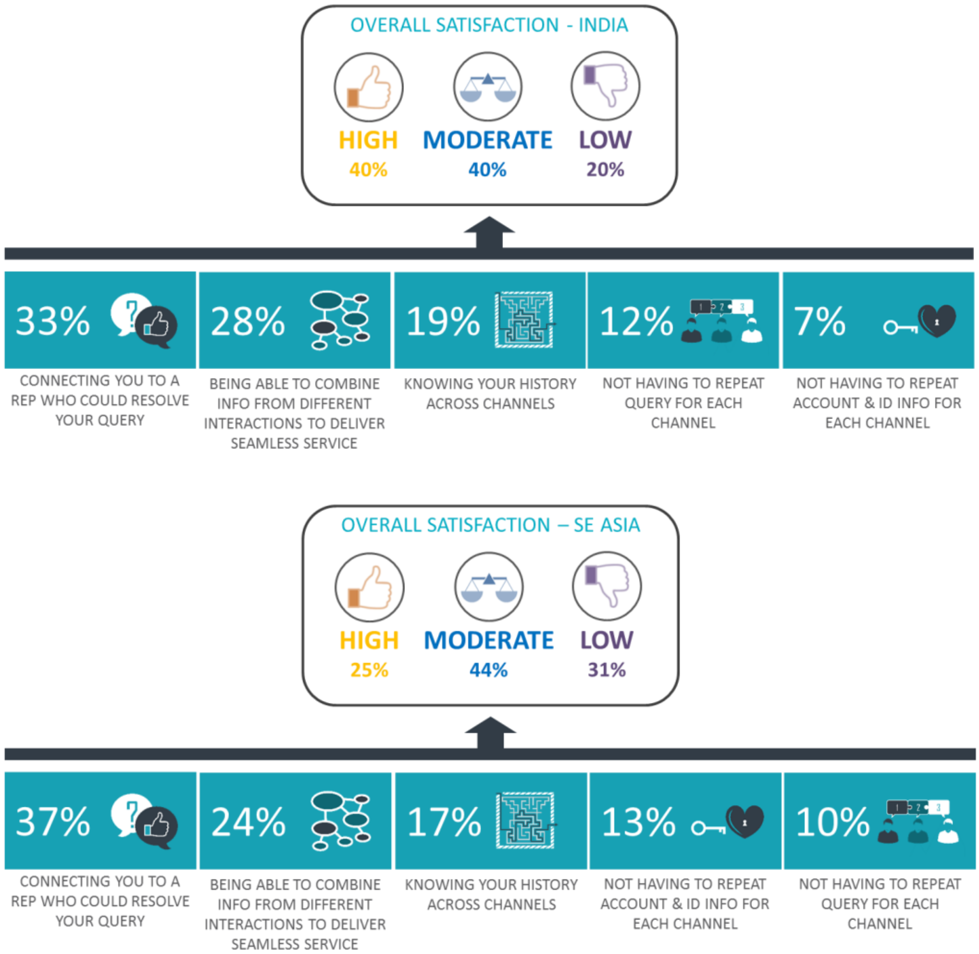


Agent accessibility and resolution is the key driver of consumer satisfaction

Overall there is room to improve the level of customer experience in India and South East Asia. One in five consumers in India and one in three consumers in South East Asia experience a low level of satisfaction, particularly with regard to agent accessibility and wait times.

Based on a regression model to determine the key drivers of customer satisfaction, the research shows that organisations need to focus their efforts on improving the ability for consumers to access a representative that can resolve their query. At the same time, organisations need to deliver an integrated and seamless experience that combines consumer data and history into a single source of truth. As a result, consumers do not need to repeat their personal information or enquiry when interacting across channels.

Figure 4
Drivers of Satisfaction



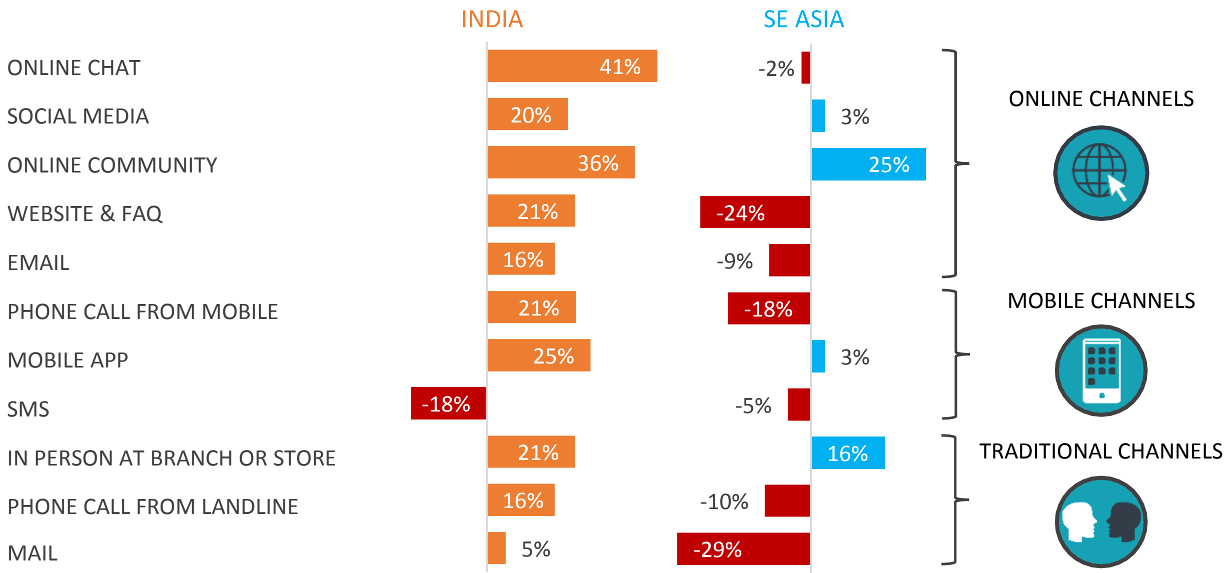
Satisfaction levels vary by channel, with the online channel experiencing the highest levels of satisfaction, especially when consumer begin their journey via an online community, online chat or social media channel.

While these channels have a lower usage compared to other channels, it is evident that those who use these channels do have a good experience.

Organisations need to evaluate how these channels fit in with their current channel mix and ensure an integrated seamless experience across all their channels to deliver a quicker query resolution.

JOURNEYS THAT BEGIN ONLINE HAVE THE HIGHEST LEVELS OF SATISFACTION

Figure 5
Overall, how satisfied were you with your experience resolving a query with this business?
(% Net satisfaction by first channel used)



Wait times and general representative accessibility are the biggest consumer complaints

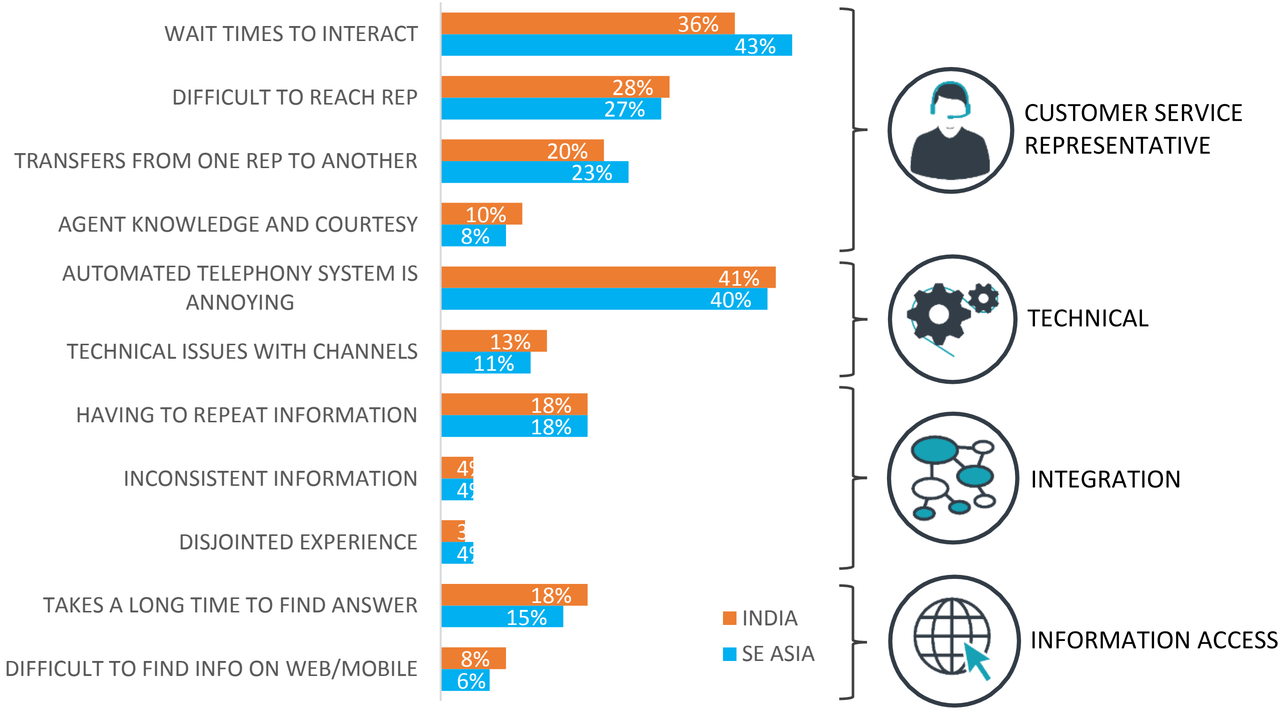
Consumers indicated that their top two pain points are automated telephony trees and time to reach the representative that can resolve their query.

Consumers are time poor and typically have several service providers, such as their bank, internet provider and utilities providers, among others. Therefore it is difficult for consumers to be on the phone for long periods of time, particularly when they have queries for different providers requiring resolution.

An opportunity exists for organisations to invest in channels such as social media or online chat, where consumers can easily access these channels with several service providers, without staying idle and waiting on the one interaction on a traditional channel, or putting up with a frustrating IVR system. This leads to a better experience for the consumer where they can access these channels when it is convenient and appropriate for them to do so.

Similarly, representatives can handle multiple interactions via social media or online chat at once, and contribute to improvements in operational efficiency for the organisation.

Figure 6
What are the top two issues that you experience with customer service?



Reflecting their current experience with organisations, consumers have low expectations of response times particularly for online chat and phone: around 10 minutes, a number that organisations should look to improve.

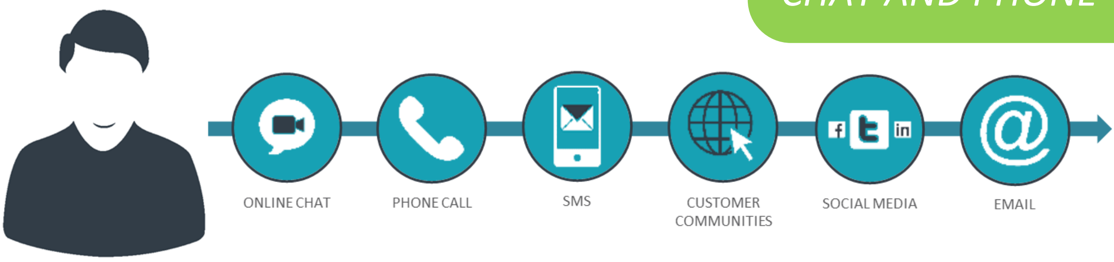
Improvements are evident for the email channel, where the ‘one business day’ response time is no longer standard.

Consumers in India and South East Asia now expect a response within 4 or 5 hours respectively.

Organisations need to ensure that these channels are setup with the right technology and processes, and resourced effectively to meet the prompt demands of the consumer.

ON AVERAGE, CONSUMERS EXPECT A RESPONSE WITHIN 10 MINUTES FOR CHAT AND PHONE

Figure 7
How quickly do you expect a response from the following channels?



	ONLINE CHAT	PHONE CALL	SMS	CUSTOMER COMMUNITIES	SOCIAL MEDIA	EMAIL
INDIA	10 MINS	11 MINS	2 HOURS	2 HOURS	3 HOURS	4 HOURS
SE ASIA	9 MINS	9 MINS	2 HOURS	2 HOURS	2.5 HOURS	5 HOURS

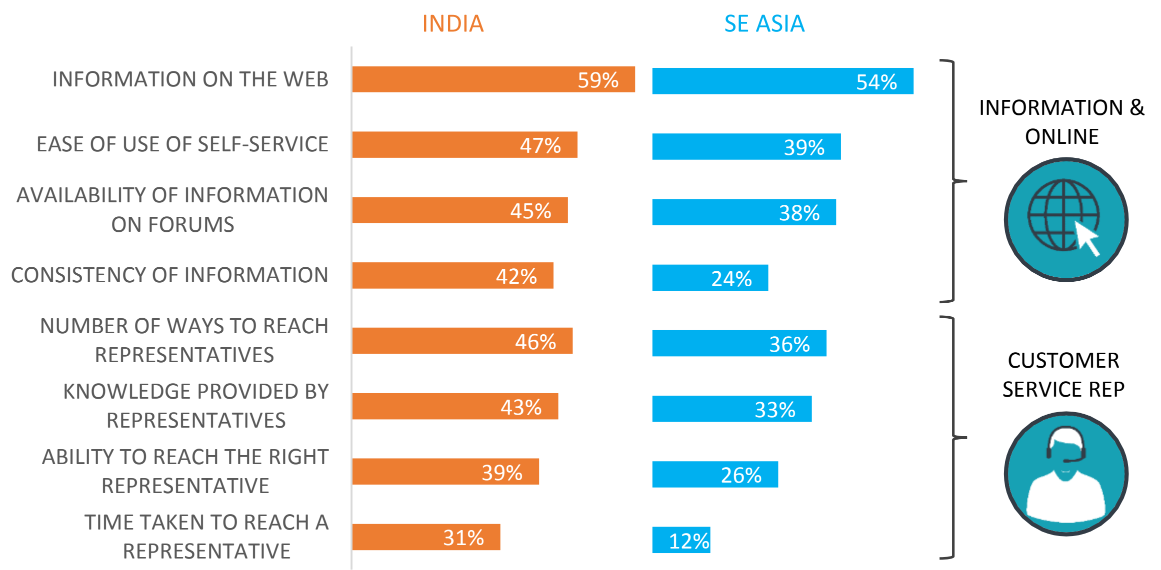
When respondents were asked about how customer service has changed in the last 12 months, the biggest improvements have been in self-service channels and information on the web, reflecting the underlying level of frustration with interactions that involve a customer service representative.

Providing online self-service options for consumers allows for 24x7 access without needing to speak to a representative, allowing consumers the convenience to perform their tasks when and where they want.

Organisations however, need to understand that self-service channels are not designed to replace traditional channels. In fact consumers may end up having more interactions with organisations: utilising self-service for basic enquiries and seeking assistance from a live representative for more complex enquiries. It is therefore critical for organisations to not overlook the representative interaction as this will remain a primary method of contact for consumers.

CONSUMERS BELIEVE THAT ACCESS TO AGENTS HAS WORSENED

Figure 8
How have the following aspects of customer service changed in the last 12 months? (% net improved)



Consumers expect organisations to deliver a personalised & seamless experience in return for providing more personal data

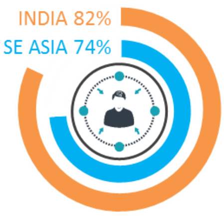
Approximately three in four consumers in India and South East Asia expect organisations to deliver an experience that is personalised and consistent across channels. On a positive note, consumers are willing to assist organisations in delivering to their expectations by sharing more personal information and connecting their devices to the Internet.

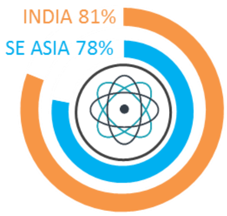
This presents an opportunity for emerging technologies such as the Internet of Things and Remote Support to help consumers with quicker resolution times.

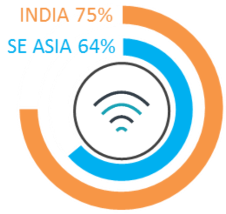
Remote support removes the need for a technician to be on-site and provides the ability to diagnose problems quicker and more accurately from a remote location. Traditionally remote support applications were for computers and mobile devices. However this is being extended to other devices thanks to mobile video.

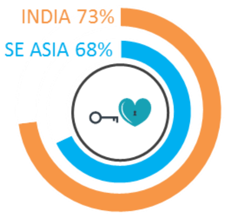
THE INTERNET OF THINGS AND REMOTE SUPPORT SHOW POTENTIAL FOR FASTER RESOLUTIONS

Figure 9
Thinking about your individual experiences, how much do you agree or disagree with the following statements…?









6. How to Optimise the Customer Experience

The Fifth Quadrant Customer Experience Model

Our proprietary customer experience model identifies the drivers that determine customer experience outcomes, such as customer satisfaction, advocacy, share of wallet and effort.

This model demonstrates that organisations that deliver a high quality product and service experience that is easy to use and delivers value to the consumer are likely to succeed in the market.

Through the lense of this model, we identify the four key areas that organisations in India and South East Asia need to focus on to optimise the customer experience.

Figure 10
Fifth Quadrant Customer Experience Model

1 UNDERSTAND CONSUMER NEEDS AND BEHAVIOURS TO BUILD TRUST

Organisations need to gain a better understanding of consumer needs, channel preferences and behaviours, in order to build trust and confidence. This can be achieved using a combination of quantitative and qualitative research methods, or simply by talking to customers and listening to their feedback.

The research reveals that consumers in India and South East Asia are increasing their usage of mobile and online channels, and are open to new technologies such as Internet of Things and Remote Support. On one critical condition, consumers expect a fast and effective response and resolution.

2 DELIVER HIGH QUALITY PRODUCTS AND SERVICES FOR CONSUMERS

Customer experience should be founded on high quality products and services that are easy to use and deliver value for consumers.

Organisations need to reduce consumer effort by:

- Optimise channels and connect consumers to the channel that is convenient for them and appropriate to their enquiry
- Organise consumer history and information to form a single view of the consumer reducing the need for them to repeat their enquiry or information
- Improve satisfaction levels by implementing a single view of the consumer to enable a seamless experience across channels

3 DELIVER A LOW EFFORT EXPERIENCE TO CONSUMERS

Based on the regression model from the research, organisations need to focus their efforts on making it easier and faster to resolve consumer queries.

This can be achieved by combining consumer data and interaction history into a single source of truth to support an integrated and seamless experience for consumers.

By doing so, consumers do not need to repeat their personal information or enquiry when interacting across channels, resulting in a reduced level of effort and a positive customer experience.

4 HIGHLY SATISFIED CONSUMERS RESULTS IN BETTER ORGANISATION PERFORMANCE

Fifth Quadrant's research has proven that the highly satisfied consumers are more likely to be advocates and increase their spend and tenure with an organisation.

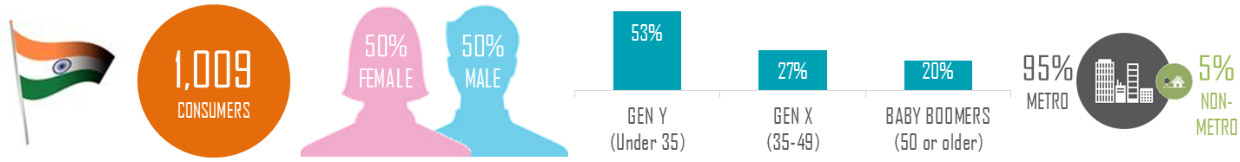
Organisations must focus on retaining and nurturing existing customers, as there are significant costs involved in losing a customer and acquiring new customers.

In today and tomorrow's world it is critical for organisations to focus on the consumer and deliver to their needs and expectations. Organisations must have an enterprise-wide customer experience strategy that delivers higher levels of consumer engagement and superior business performance in particular, revenue generation.

7. Appendix

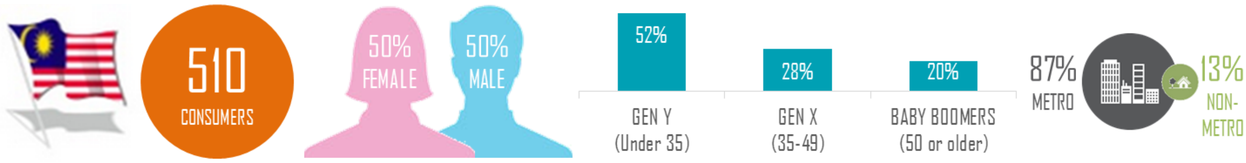
Country Summaries

India



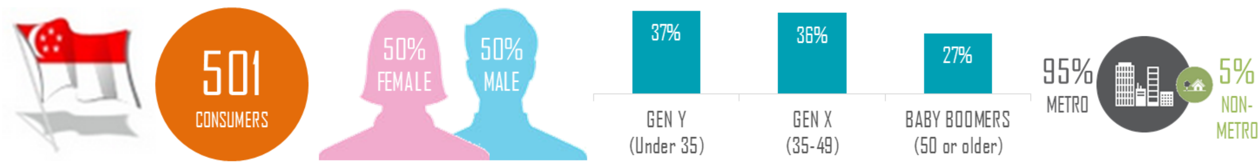
CHANNEL USAGE	CHANNELS USED 79% ONLINE 72% MOBILE 55% TRADITIONAL	FIRST CHANNEL USED 51% ONLINE 31% MOBILE 18% TRADITIONAL	FIRST IS MOST EFFECTIVE 74% ONLINE 73% MOBILE 72% TRADITIONAL	% INCREASED USAGE 37% EMAIL 35% MOBILE PHONE CALL 35% MOBILE APP 34% SOCIAL MEDIA
SATISFACTION LEVELS	OVERALL SATISFACTION 40% HIGH 40% MODERATE 20% LOW	SATISFACTION BY CHANNEL 41% ONLINE 42% MOBILE 38% TRADITIONAL	LOW EFFECTIVENESS AREAS 33% REPEATING QUERY 32% REPEATING ACCOUNT / IDENTIFICATION INFO 24% CONNECTING TO A REP THAT COULD ASSIST YOU	DRIVERS OF SATISFACTION 33% CONNECTING TO A REP THAT COULD ASSIST YOU 28% COMBINING INFO FOR SEAMLESS SERVICE 19% KNOWING YOUR HISTORY
KEY CHALLENGES	77% CUSTOMER SERVICE REP	52% TECHNICAL	25% INTEGRATION	25% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	71% STOPPED DOING BUSINESS WITH A COMPANY		78% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

Malaysia



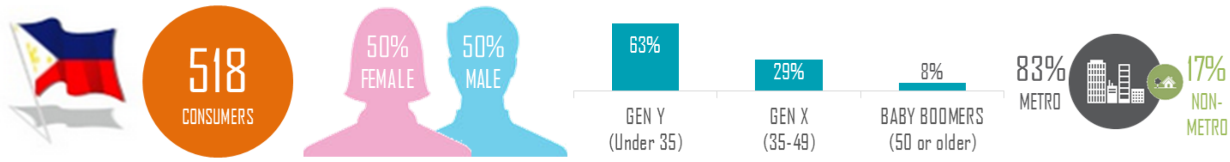
CHANNEL USAGE	CHANNELS USED 70% ONLINE 49% TRADITIONAL 55% MOBILE	FIRST CHANNEL USED 52% ONLINE 24% TRADITIONAL 25% MOBILE	FIRST IS MOST EFFECTIVE 88% ONLINE 96% TRADITIONAL 77% MOBILE	% INCREASED USAGE 36% EMAIL 36% SOCIAL MEDIA 34% MOBILE APP
SATISFACTION LEVELS	OVERALL SATISFACTION 30% HIGH 40% MODERATE 30% LOW	SATISFACTION BY CHANNEL 28% ONLINE 38% TRADITIONAL 25% MOBILE	LOW EFFECTIVENESS AREAS 45% REPEATING QUERY 41% REPEATING ACCOUNT / IDENTIFICATION INFO 34% KNOWING YOUR HISTORY	DRIVERS OF SATISFACTION 32% CONNECTING TO A REP THAT COULD ASSIST YOU 25% KNOWING YOUR HISTORY 23% COMBINING INFO FOR SEAMLESS SERVICE
KEY CHALLENGES	82% CUSTOMER SERVICE REP	47% TECHNICAL	26% INTEGRATION	25% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	75% STOPPED DOING BUSINESS WITH A COMPANY		72% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

Singapore



CHANNEL USAGE	CHANNELS USED 67% ONLINE 57% TRADITIONAL 49% MOBILE	FIRST CHANNEL USED 47% ONLINE 28% TRADITIONAL 25% MOBILE	FIRST IS MOST EFFECTIVE 65% ONLINE 91% TRADITIONAL 70% MOBILE	% INCREASED USAGE 34% MOBILE APP 30% EMAIL 29% WEBSITE/FAQ 27% SOCIAL MEDIA
SATISFACTION LEVELS	OVERALL SATISFACTION 10% HIGH 48% MODERATE 42% LOW	SATISFACTION BY CHANNEL 11% ONLINE 9% TRADITIONAL 12% MOBILE	LOW EFFECTIVENESS AREAS 51% REPEATING ACCOUNT / IDENTIFICATION INFO 49% REPEATING QUERY 45% COMBINING INFO FOR SEAMLESS SERVICE	DRIVERS OF SATISFACTION 31% CONNECTING TO A REP THAT COULD ASSIST YOU 28% COMBINING INFO FOR SEAMLESS SERVICE 17% KNOWING YOUR HISTORY
KEY CHALLENGES	81% CUSTOMER SERVICE REP	53% TECHNICAL	26% INTEGRATION	16% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	78% STOPPED DOING BUSINESS WITH A COMPANY		70% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

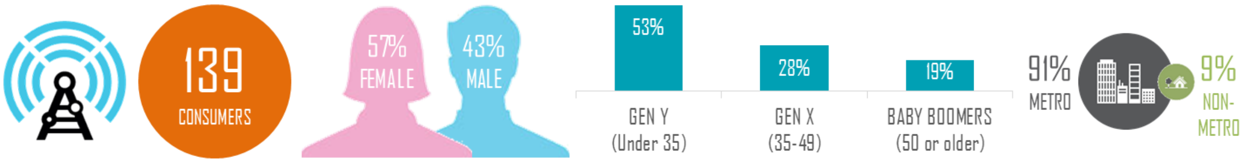
The Philippines



CHANNEL USAGE	CHANNELS USED 73% ONLINE 70% TRADITIONAL 45% MOBILE	FIRST CHANNEL USED 44% ONLINE 42% TRADITIONAL 14% MOBILE	FIRST IS MOST EFFECTIVE 76% ONLINE 92% TRADITIONAL 67% MOBILE	% INCREASED USAGE 47% SOCIAL MEDIA 40% EMAIL 38% FACE-TO-FACE 38% MOBILE PHONE CALL
SATISFACTION LEVELS	OVERALL SATISFACTION 34% HIGH 45% MODERATE 21% LOW	SATISFACTION BY CHANNEL 33% ONLINE 37% TRADITIONAL 28% MOBILE	LOW EFFECTIVENESS AREAS 35% REPEATING ACCOUNT / IDENTIFICATION INFO 32% REPEATING QUERY 25% KNOWING YOUR HISTORY	DRIVERS OF SATISFACTION 50% CONNECTING TO A REP THAT COULD ASSIST YOU 17% COMBINING INFO FOR SEAMLESS SERVICE 15% REPEATING QUERY
KEY CHALLENGES	83% CUSTOMER SERVICE REP	49% TECHNICAL	23% INTEGRATION	21% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	75% STOPPED DOING BUSINESS WITH A COMPANY		72% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

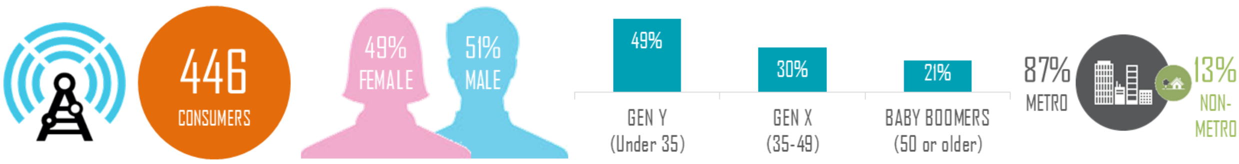
Industry Summaries

Telecommunications – India



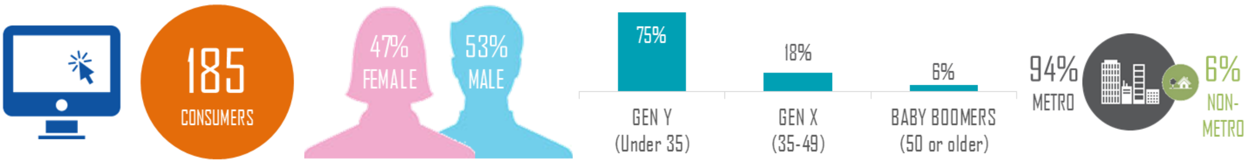
CHANNEL USAGE	CHANNELS USED 58% ONLINE 71% MOBILE 47% TRADITIONAL	FIRST CHANNEL USED 37% ONLINE 44% MOBILE 19% TRADITIONAL	FIRST IS MOST EFFECTIVE 73% ONLINE 85% MOBILE 81% TRADITIONAL	% INCREASED USAGE 37% MOBILE PHONE CALL 31% MOBILE APP 31% SOCIAL MEDIA
SATISFACTION LEVELS	OVERALL SATISFACTION 39% HIGH 42% MODERATE 19% LOW	SATISFACTION BY CHANNEL 37% ONLINE 36% MOBILE 50% TRADITIONAL	LOW EFFECTIVENESS AREAS 35% REPEATING QUERY 31% REPEATING ACCOUNT / IDENTIFICATION INFO 29% KNOWING YOUR HISTORY	DRIVERS OF SATISFACTION 41% KNOWING YOUR HISTORY 33% CONNECTING TO A REP THAT COULD ASSIST YOU 13% REPEATING ACCOUNT / IDENTIFICATION INFO
KEY CHALLENGES	76% CUSTOMER SERVICE REP	49% TECHNICAL	24% INTEGRATION	30% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	65% STOPPED DOING BUSINESS WITH A COMPANY		69% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

Telecommunications – South East Asia



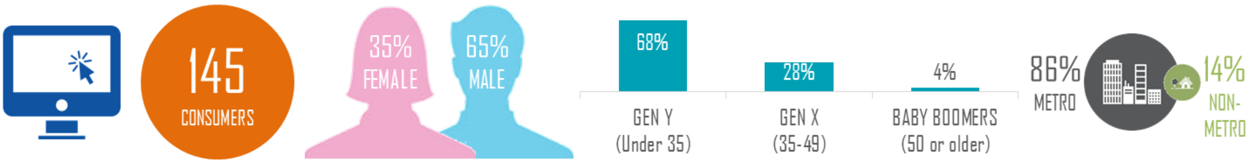
CHANNEL USAGE	CHANNELS USED 50% ONLINE 58% TRADITIONAL 47% MOBILE	FIRST CHANNEL USED 34% ONLINE 39% TRADITIONAL 27% MOBILE	FIRST IS MOST EFFECTIVE 74% ONLINE 95% TRADITIONAL 83% MOBILE	% INCREASED USAGE 33% EMAIL 33% MOBILE APP 32% MOBILE PHONE CALL 32% SOCIAL MEDIA
SATISFACTION LEVELS	OVERALL SATISFACTION 28% HIGH 43% MODERATE 29% LOW	SATISFACTION BY CHANNEL 31% ONLINE 30% TRADITIONAL 20% MOBILE	LOW EFFECTIVENESS AREAS 45% REPEATING QUERY 44% REPEATING ACCOUNT / IDENTIFICATION INFO 37% KNOWING YOUR HISTORY	DRIVERS OF SATISFACTION 40% CONNECTING TO A REP THAT COULD ASSIST YOU 31% COMBINING INFO FOR SEAMLESS SERVICE 13% REPEATING QUERY
KEY CHALLENGES	85% CUSTOMER SERVICE REP	50% TECHNICAL	24% INTEGRATION	18% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	72% STOPPED DOING BUSINESS WITH A COMPANY		69% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

IT & Computer Services – India



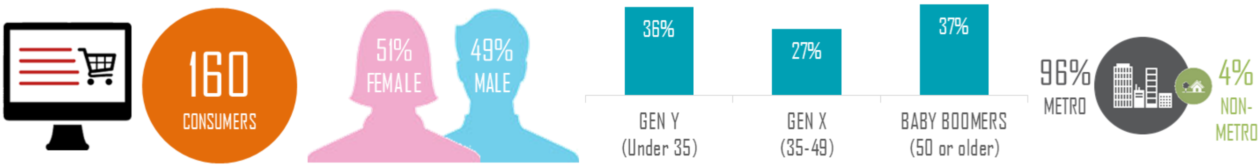
CHANNEL USAGE	CHANNELS USED 83% ONLINE 65% MOBILE 48% TRADITIONAL	FIRST CHANNEL USED 56% ONLINE 26% MOBILE 18% TRADITIONAL	FIRST IS MOST EFFECTIVE 84% ONLINE 67% MOBILE 70% TRADITIONAL	% INCREASED USAGE 34% EMAIL 32% ONLINE COMMUNITY 31% SOCIAL MEDIA
SATISFACTION LEVELS	OVERALL SATISFACTION 36% HIGH 37% MODERATE 26% LOW	SATISFACTION BY CHANNEL 41% ONLINE 31% MOBILE 30% TRADITIONAL	LOW EFFECTIVENESS AREAS 29% REPEATING QUERY 26% KNOWING YOUR HISTORY 26% CONNECTING TO A REP THAT COULD ASSIST YOU	DRIVERS OF SATISFACTION 39% COMBINING INFO FOR SEAMLESS SERVICE 33% CONNECTING TO A REP THAT COULD ASSIST YOU 22% REPEATING QUERY
KEY CHALLENGES	81% CUSTOMER SERVICE REP	45% TECHNICAL	23% INTEGRATION	28% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	70% STOPPED DOING BUSINESS WITH A COMPANY		74% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

IT & Computer Services – South East Asia



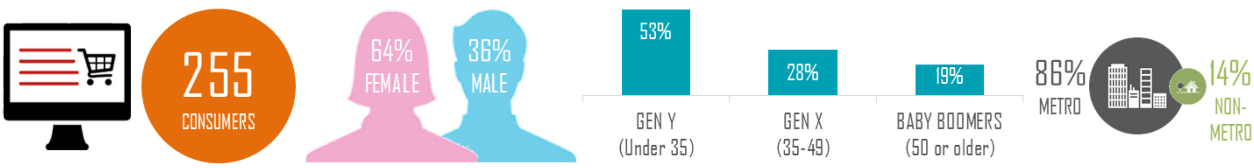
CHANNEL USAGE	CHANNELS USED 70% ONLINE 57% TRADITIONAL 38% MOBILE	FIRST CHANNEL USED 55% ONLINE 33% TRADITIONAL 12% MOBILE	FIRST IS MOST EFFECTIVE 81% ONLINE 90% TRADITIONAL 65% MOBILE	% INCREASED USAGE 39% SOCIAL MEDIA 34% EMAIL 29% MOBILE APP 29% ONLINE COMMUNITY
SATISFACTION LEVELS	OVERALL SATISFACTION 26% HIGH 39% MODERATE 35% LOW	SATISFACTION BY CHANNEL 20% ONLINE 40% TRADITIONAL 18% MOBILE	LOW EFFECTIVENESS AREAS 50% REPEATING ACCOUNT / IDENTIFICATION INFO 46% REPEATING QUERY 41% COMBINING INFO FOR SEAMLESS SERVICE	DRIVERS OF SATISFACTION 55% CONNECTING TO A REP THAT COULD ASSIST YOU 26% REPEATING ACCOUNT / IDENTIFICATION INFO 13% REPEATING QUERY
KEY CHALLENGES	83% CUSTOMER SERVICE REP	45% TECHNICAL	28% INTEGRATION	24% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	72% STOPPED DOING BUSINESS WITH A COMPANY		65% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

Retailers with an Online Presence – India



CHANNEL USAGE	CHANNELS USED 71% ONLINE 60% MOBILE 39% TRADITIONAL	FIRST CHANNEL USED 51% ONLINE 29% MOBILE 19% TRADITIONAL	FIRST IS MOST EFFECTIVE 78% ONLINE 79% MOBILE 84% TRADITIONAL	% INCREASED USAGE 35% MOBILE PHONE CALL 33% MOBILE APP 31% EMAIL
SATISFACTION LEVELS	OVERALL SATISFACTION 36% HIGH 43% MODERATE 21% LOW	SATISFACTION BY CHANNEL 32% ONLINE 49% MOBILE 29% TRADITIONAL	LOW EFFECTIVENESS AREAS 40% REPEATING ACCOUNT / IDENTIFICATION INFO 39% REPEATING QUERY 32% COMBINING INFO FOR SEAMLESS SERVICE	DRIVERS OF SATISFACTION 39% KNOWING YOUR HISTORY 31% COMBINING INFO FOR SEAMLESS SERVICE 19% REPEATING QUERY
KEY CHALLENGES	77% CUSTOMER SERVICE REP	56% TECHNICAL	19% INTEGRATION	25% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	70% STOPPED DOING BUSINESS WITH A COMPANY		73% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

Retailers with an Online Presence – South East Asia



CHANNEL USAGE	CHANNELS USED 75% ONLINE 38% TRADITIONAL 40% MOBILE	FIRST CHANNEL USED 59% ONLINE 22% TRADITIONAL 19% MOBILE	FIRST IS MOST EFFECTIVE 87% ONLINE 95% TRADITIONAL 82% MOBILE	% INCREASED USAGE 47% SOCIAL MEDIA 40% EMAIL 35% MOBILE APP 33% ONLINE COMMUNITY
SATISFACTION LEVELS	OVERALL SATISFACTION 22% HIGH 44% MODERATE 35% LOW	SATISFACTION BY CHANNEL 21% ONLINE 25% TRADITIONAL 18% MOBILE	LOW EFFECTIVENESS AREAS 44% REPEATING ACCOUNT / IDENTIFICATION INFO 43% REPEATING QUERY 39% CONNECTING TO A REP THAT COULD ASSIST YOU	DRIVERS OF SATISFACTION 33% CONNECTING TO A REP THAT COULD ASSIST YOU 23% KNOWING YOUR HISTORY 21% COMBINING INFO FOR SEAMLESS SERVICE
KEY CHALLENGES	81% CUSTOMER SERVICE REP	46% TECHNICAL	27% INTEGRATION	20% INFORMATION ACCESS
IMPACT OF POOR CUSTOMER SERVICE	78% STOPPED DOING BUSINESS WITH A COMPANY		65% WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	

Consumer Age Analysis

India

	GEN Y (UNDER 35) 53% N=535	GEN X (35-49) 27% N=270	BABY BOOMERS (50 OR OLDER) 20% N=204
CHANNEL USAGE			
CHANNELS USED	82% ONLINE 75% MOBILE 55% TRADITIONAL	78% ONLINE 74% MOBILE 54% TRADITIONAL	73% ONLINE 60% MOBILE 56% TRADITIONAL
FIRST CHANNEL USED	54% ONLINE 31% MOBILE 15% TRADITIONAL	47% ONLINE 34% MOBILE 19% TRADITIONAL	50% ONLINE 26% MOBILE 24% TRADITIONAL
FIRST CHANNEL IS MOST EFFECTIVE	72% ONLINE 72% MOBILE 66% TRADITIONAL	73% ONLINE 73% MOBILE 70% TRADITIONAL	80% ONLINE 75% MOBILE 83% TRADITIONAL
% INCREASED USAGE	35% EMAIL 32% SOCIAL MEDIA 30% MOBILE APP	41% MOBILE APP 39% SOCIAL MEDIA 38% MOBILE PHONE CALL	47% EMAIL 47% MOBILE PHONE CALL 42% MOBILE APP
KEY CHALLENGES			
TOP TWO ISSUES EXPERIENCED WITH CUSTOMER SERVICE	78% CUSTOMER SERVICE REP 47% TECHNICAL 28% INTEGRATION 28% INFORMATION ACCESS	78% CUSTOMER SERVICE REP 55% TECHNICAL 23% INTEGRATION 20% INFORMATION ACCESS	75% CUSTOMER SERVICE REP 63% TECHNICAL 20% INTEGRATION 24% INFORMATION ACCESS
SATISFACTION LEVELS			
OVERALL SATISFACTION	41% HIGH; 39% MODERATE; 21% LOW	38% HIGH; 44% MODERATE; 18% LOW	44% HIGH; 36% MODERATE; 21% LOW
SATISFACTION BY CHANNEL (% HIGH SATISFACTION)	41% ONLINE 39% MOBILE 40% TRADITIONAL	40% ONLINE 41% MOBILE 26% TRADITIONAL	39% ONLINE 51% MOBILE 46% TRADITIONAL
LOW EFFECTIVENESS AREAS	32% REPEATING QUERY 31% REPEATING ACCOUNT / ID INFO 25% KNOWING YOUR HISTORY	31% REPEATING QUERY 29% REPEATING ACCOUNT / ID INFO 22% CONNECTING TO A REP THAT COULD ASSIST YOU	40% REPEATING ACCOUNT / ID INFO 35% REPEATING QUERY 28% COMBINING INFO FOR SEAMLESS SERVICE
DRIVERS OF SATISFACTION	39% CONNECTING TO A REP THAT COULD ASSIST YOU 33% COMBINING INFO FOR SEAMLESS SERVICE	27% COMBINING INFO FOR SEAMLESS SERVICE 27% REPEATING ACCOUNT / ID INFO	40% KNOWING YOUR HISTORY 29% CONNECTING TO A REP THAT COULD ASSIST YOU
IMPACT OF POOR CUSTOMER SERVICE			
STOPPED DOING BUSINESS WITH A COMPANY	72%	63%	76%
WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	79%	77%	81%

South East Asia

	GEN Y (UNDER 35) 51% N=778	GEN X (35-49) 31% N=472	BABY BOOMERS (50 OR OLDER) 18% N=279
CHANNEL USAGE			
CHANNELS USED	75% ONLINE 54% TRADITIONAL 52% MOBILE	69% ONLINE 60% TRADITIONAL 49% MOBILE	59% ONLINE 68% TRADITIONAL 43% MOBILE
FIRST CHANNEL USED	52% ONLINE 27% TRADITIONAL 21% MOBILE	45% ONLINE 33% TRADITIONAL 22% MOBILE	40% ONLINE 41% TRADITIONAL 19% MOBILE
FIRST CHANNEL IS MOST EFFECTIVE	75% ONLINE 92% TRADITIONAL 72% MOBILE	76% ONLINE 90% TRADITIONAL 74% MOBILE	68% ONLINE 96% TRADITIONAL 70% MOBILE
% INCREASED USAGE	42% SOCIAL MEDIA 35% EMAIL 33% MOBILE APP	36% SOCIAL MEDIA 35% EMAIL 32% MOBILE APP	38% EMAIL 33% WEBSITE/FAQ 32% MOBILE PHONE CALL
KEY CHALLENGES			
TOP TWO ISSUES EXPERIENCED WITH CUSTOMER SERVICE	83% CUSTOMER SERVICE REP 40% TECHNICAL 27% INTEGRATION 25% INFORMATION ACCESS	84% CUSTOMER SERVICE REP 56% TECHNICAL 23% INTEGRATION 19% INFORMATION ACCESS	78% CUSTOMER SERVICE REP 66% TECHNICAL 25% INTEGRATION 13% INFORMATION ACCESS
SATISFACTION LEVELS			
OVERALL SATISFACTION	28% HIGH; 43% MODERATE; 29% LOW	21% HIGH; 45% MODERATE; 34% LOW	23% HIGH; 46% MODERATE; 32% LOW
SATISFACTION BY CHANNEL (% HIGH SATISFACTION)	26% ONLINE 36% TRADITIONAL 23% MOBILE	24% ONLINE 19% TRADITIONAL 18% MOBILE	18% ONLINE 31% TRADITIONAL 15% MOBILE
LOW EFFECTIVENESS AREAS	41% REPEATING ACCOUNT / ID INFO 40% REPEATING QUERY 33% KNOWING YOUR HISTORY	44% REPEATING ACCOUNT / ID INFO 43% REPEATING QUERY 36% KNOWING YOUR HISTORY	43% REPEATING ACCOUNT / ID INFO 43% REPEATING QUERY 34% KNOWING YOUR HISTORY
DRIVERS OF SATISFACTION	35% CONNECTING TO A REP THAT COULD ASSIST YOU 24% COMBINING INFO FOR SEAMLESS SERVICE	45% CONNECTING TO A REP THAT COULD ASSIST YOU 21% KNOWING YOUR HISTORY	35% CONNECTING TO A REP THAT COULD ASSIST YOU 33% COMBINING INFO FOR SEAMLESS SERVICE
IMPACT OF POOR CUSTOMER SERVICE			
STOPPED DOING BUSINESS WITH A COMPANY	73%	79%	80%
WOULD ADVISE FRIENDS & FAMILY TO AVOID A COMPANY	70%	72%	75%

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We hope this analysis will help you make informed and imaginative business decisions. If you have further requirements, Fifth Quadrant's consulting team may be able to help you. For more information about Fifth Quadrant's capabilities, please contact us directly at:

info@fifthquadrant.com.au

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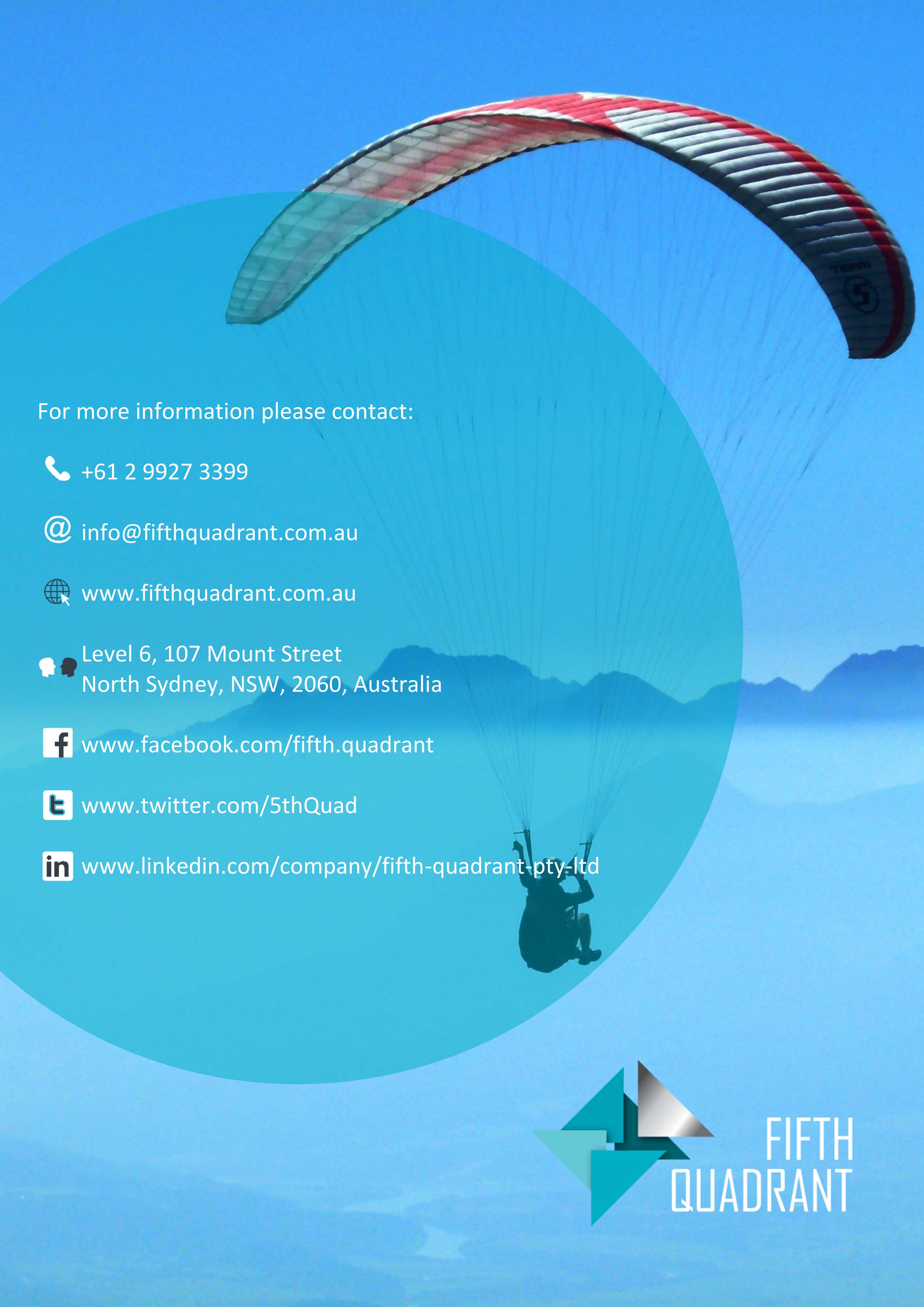

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