



VOCALABS™

# National Customer Service Survey<sup>SM</sup> Computer Tech Support

**July 2010**

Based on data collected from  
January 2009 to June 2010

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## About This Study

The National Customer Service Survey compares the customer service quality for different companies in the same industry, using survey data and call statistics from the companies' customers. As part of this ongoing research, we interview customers of competing companies immediately after a customer service call.

### About This Release

The data in this report is based on 2,112 completed telephone interviews conducted between January 2009 and June 2010. We collected enough data on Apple, Dell, and HP to make direct comparisons of the three companies' support effectiveness.

### Methodology

Consumers were recruited online to participate in this study, and called an alternate toll-free phone number for technical support. This alternate number forwarded to the company's published technical support phone number and allowed Vocalabs to track the progress of each call. Selected participants were called back immediately after the end of the support call and interviewed about their experience.

The full data set, including survey responses and interview recordings, is available on a syndicated basis.

The National Customer Service Survey is a continuation of Vocalabs' ongoing research, formerly called Service Quality Tracker. Vocalabs has been publishing syndicated industry research on phone-based customer service quality since 2004.



## Summary of Key Findings

- **Apple continues to dominate in customer satisfaction with phone-based tech support, and widened its lead over HP and Dell across critical metrics, including:**

**Eight percentage point improvement in overall satisfaction** – 66% of Apple customers interviewed in 1H 2010 reported they were “Very Satisfied” with the company, compared to 58% in 2H 2009.

**Eight percentage point improvement in call satisfaction** – 73% of Apple customers interviewed 1H 2010 said they were “Very Satisfied” with the call, up from 65% in 2H 2009.

**Six percentage point improvement in agent satisfaction** – 82% of Apple customers interviewed in 1H 2010 said they were “Very Satisfied” with the agent, compared to 76% in 2H 2009.

- **HP made dramatic improvements in problem resolution and wait times, while sustaining customer service quality gains made in 2H 2009.**

In 2H 2009, HP saw a 7 percentage point improvement in overall call satisfaction, and an 8 percentage point improvement in agent satisfaction from 1H 2009 levels. HP sustained these satisfaction gains in 1H 2010.

In 1H 2010, 52% of HP customers said their problem was resolved on the call, up 8 percentage points from 2H 2009. Ninety-three percent of HP customers said the wait time to speak to an agent was acceptable, up 9 percentage points.

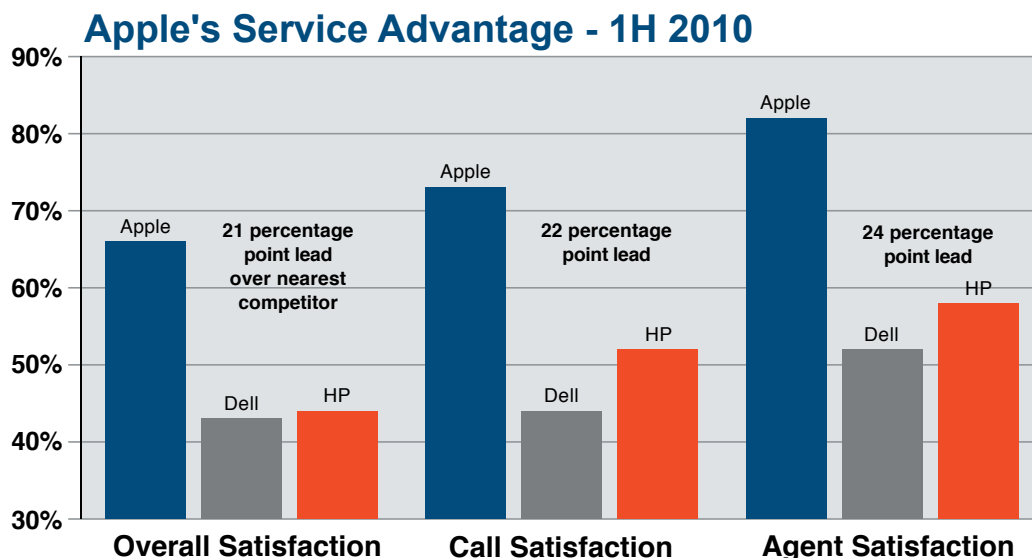
- **Tech support call satisfaction and agent satisfaction strongly impact a customer’s willingness to repurchase and to recommend.**

Customers who said they were “Very Satisfied” with the call are **4 times** as likely to repurchase again from the company and **4 times** as likely to recommend the company than customers who were dissatisfied with the call.

Customers who said they were “Very Satisfied” with the agent are **3 times** as likely to repurchase again and **4 times** as likely to recommend the company than customers who said they were dissatisfied with the agent.

- **Problem resolution has greatest impact on customer satisfaction with the call and agent.**

Factors that have the greatest impact on call and agent satisfaction are whether the customer felt there were irrelevant or repetitive steps on the call, whether the agent was willing to transfer to a supervisor, and, most importantly, whether the customer’s problem was resolved on the call.

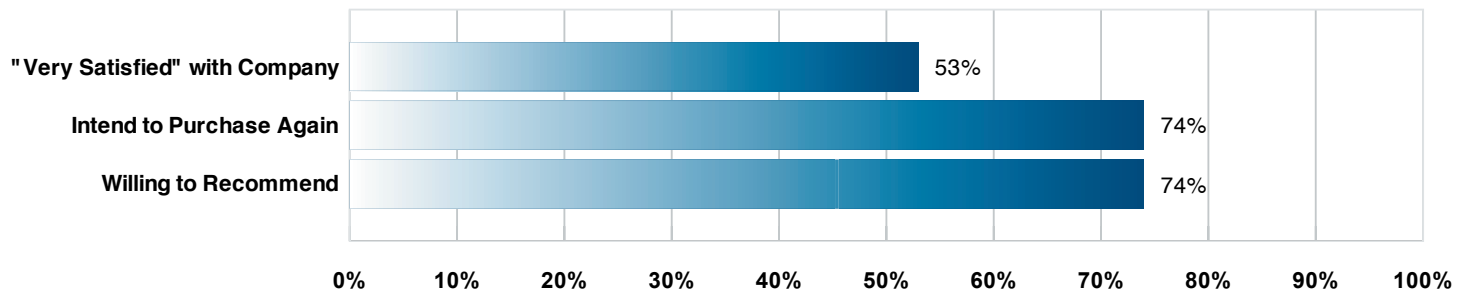




## Call Satisfaction and Business Outcomes

Of the 955 customers surveyed during 1H 2010, 74% said they intended to purchase from the company again in the future. The same percentage of customers surveyed said they would recommend the Company to a friend or colleague. Fifty-three percent of all respondents said they were very satisfied with the company overall.

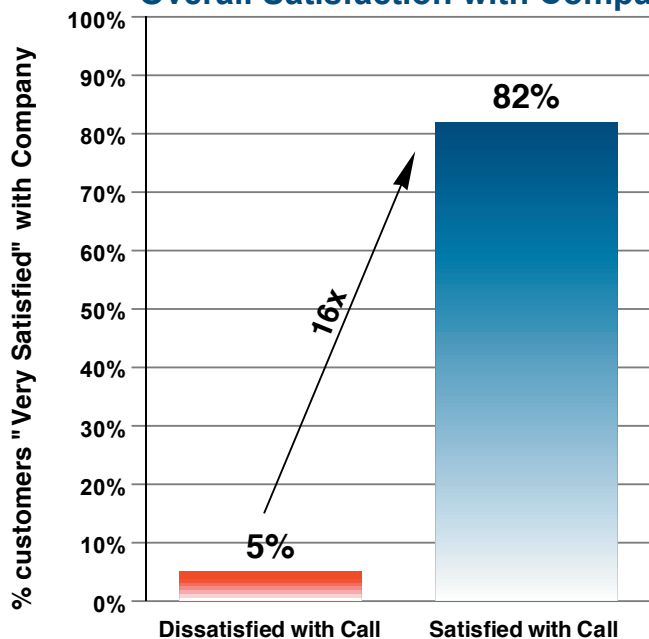
### Business Outcome Metrics - 1H 2010



We found that customer satisfaction with the call, agent and automated system had a significant impact on intent to repurchase, willingness to recommend, and on overall satisfaction with the company. Customer satisfaction with the call had the greatest impact on business outcomes. Eighty-two percent of customers who said they were "Very Satisfied" with the call said they were "Very Satisfied" with the company, compared to just 5% of those who reported they were dissatisfied with the call. Ninety-one percent of customers who were "Very Satisfied" with the call said they would repurchase from the company, compared to 26% of customers who were dissatisfied with the call.

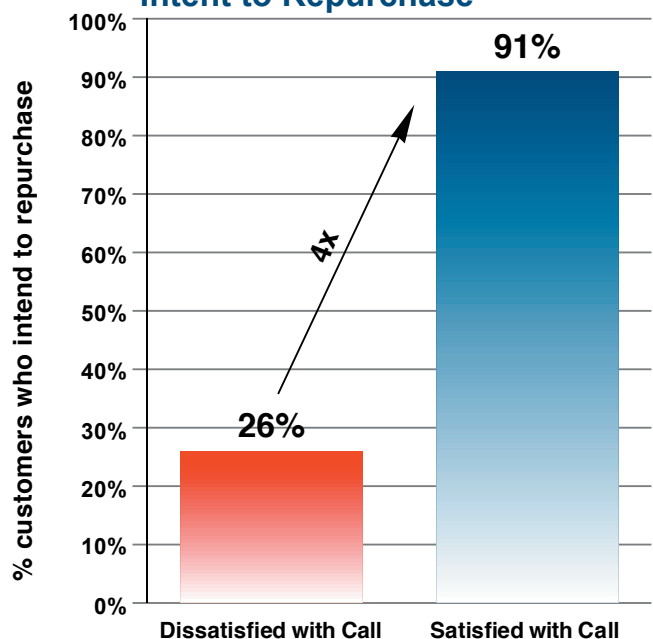
Customers who were "Very Satisfied" with the agent were 3x as likely to repurchase than customers who were dissatisfied with the agent. Those who said they were "Very Satisfied" with the automated portion of the call were twice as likely to repurchase than those who were dissatisfied.

### Impact of Call Satisfaction on Overall Satisfaction with Company



Customers who are "Very Satisfied" with the call are 16x as likely to be satisfied with the company

### Impact of Call Satisfaction on Intent to Repurchase



Customers who are "Very Satisfied" with the call are 4x as likely to say they would purchase again



## Technical Support Trends: Apple vs. Dell vs. HP

This executive summary presents results of 18 months of continuous survey data for The National Customer Service Survey for Technical Support. The survey measures customers' perceptions of the quality of the technical support they receive from Apple, Dell, and HP.

Two key trends emerged from surveys conducted during the first half of 2010. Apple widened its lead over Dell and HP across several key customer service metrics. During the period, HP made significant improvements in problem resolution and wait times, while sustaining gains in call and agent satisfaction made during the second half of 2009.

### Business Outcomes

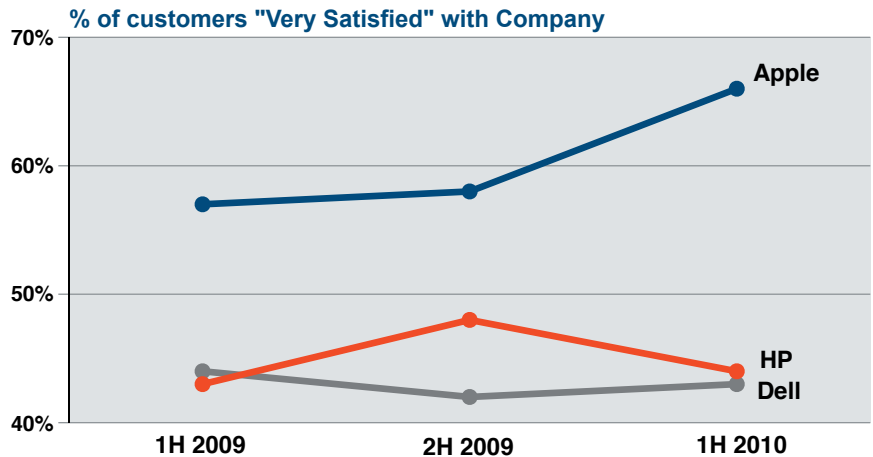
Apple has historically had a reputation for a high level of customer service and satisfaction, and that reputation was borne out once again by our survey results. Apple beat both Dell and HP in nearly every major customer service metric in our survey including company satisfaction, intent to repurchase, likelihood to recommend, call satisfaction, agent satisfaction, and problem resolution.

In the first half of 2010, Apple's lead over Dell and HP widened across several of these metrics. Gains for Apple for key business outcome metrics included:

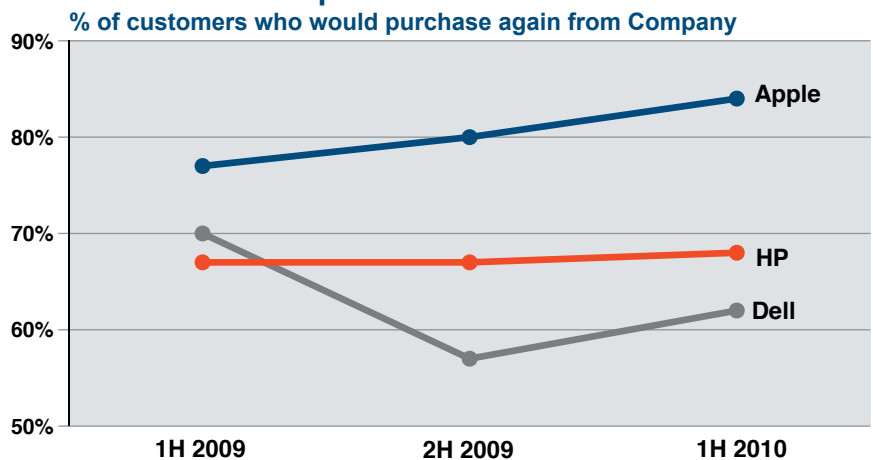
- **Eight percentage point improvement in overall satisfaction.** Sixty-six percent of Apple customers interviewed in 1H 2010 reported they were "Very Satisfied" with the company, compared to 58% in 2H 2009.
- **Four percentage point improvement in likelihood to repurchase.** Eighty-four percent of Apple customers interviewed in 1H 2010 said they would purchase again from the company, compared to 80% of those interviewed in 2H 2009.

None of the companies saw a meaningful change in customers' willingness to recommend during the first half of 2010. (Note: this question was added to the NCSS survey in July 2009.)

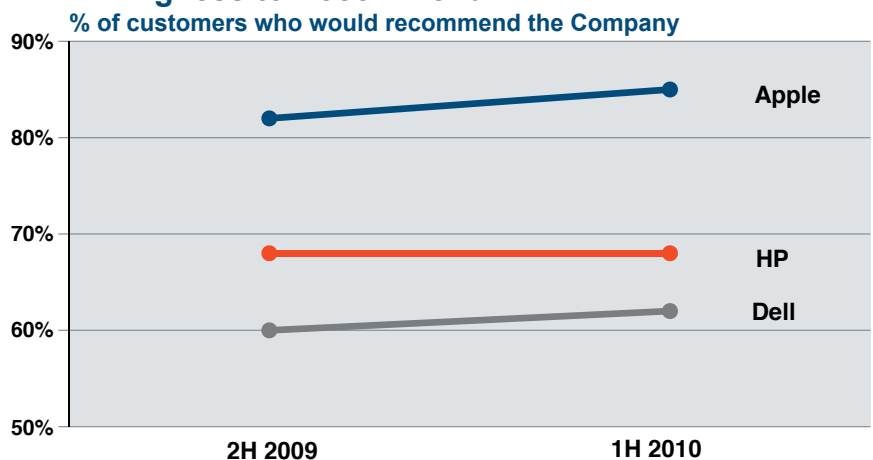
### Overall Satisfaction



### Likelihood to Repurchase



### Willingness to Recommend





**Call Outcomes**

- **Apple's lead over Dell and HP improved in customer satisfaction with the call and the agent.** In 1H 2010, 73% of Apple customers reported being "Very Satisfied" with the call, up 8 percentage points from 2H 2009, and up 10 percentage points year over year.

Apple also made statistically significant improvements in agent satisfaction during 1H 2010. Eighty-two percent of Apple customers reported they were "Very Satisfied" with the agent, up 6 percentage points from 2H 2009 and 8 percentage points year over year.

- **HP sustained the improvements it made in call and agent satisfaction during 2H 2009.** Fifty-two percent and fifty-eight percent of HP customers surveyed in 1H 2010 reported they were "Very Satisfied" with the call and the agent respectively.

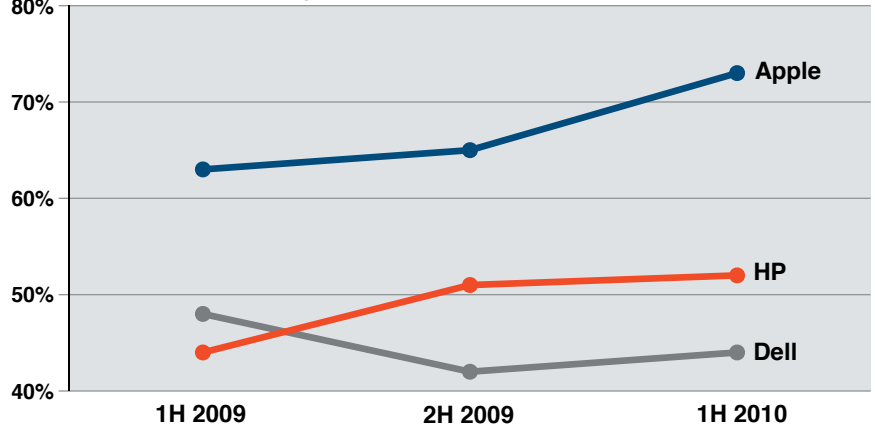
- **Apple's performance on IVR satisfaction declined during 1H 2010, as did HP's.** Thirty-seven percent of Apple customers reported they were "Very Satisfied" with the automated portion of the call, down 15 percentage points from 2H 2009 levels.

Twenty-one percent of Apple customers who used the automated system on the call reported they experienced problems with the system. Of the Apple customers who said they encountered problems, 64% said the system had difficulty understanding what they said.

HP saw its IVR satisfaction gains erased in 1H 2010, as well, with a 9 percentage point drop in customers who said they were "Very Satisfied" with the automated portion of the call.

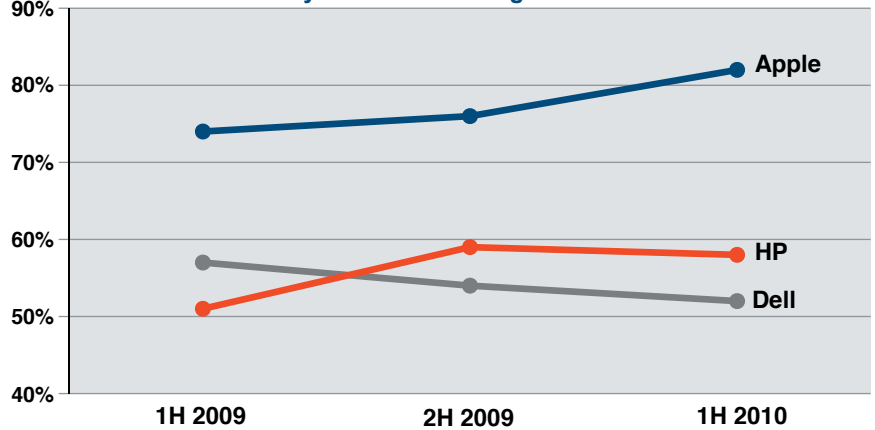
**Call Satisfaction**

% of customers "Very Satisfied" with the tech support call



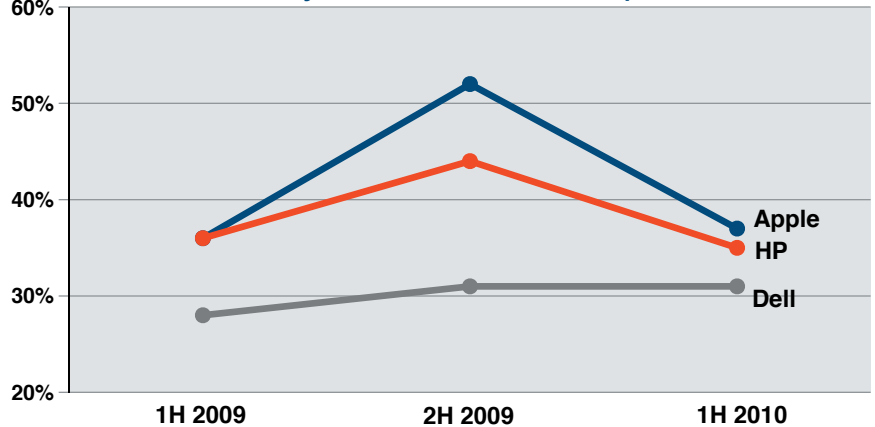
**Agent Satisfaction**

% of customers "Very Satisfied" with agent



**IVR Satisfaction**

% of customers "Very Satisfied" with automated portion of call





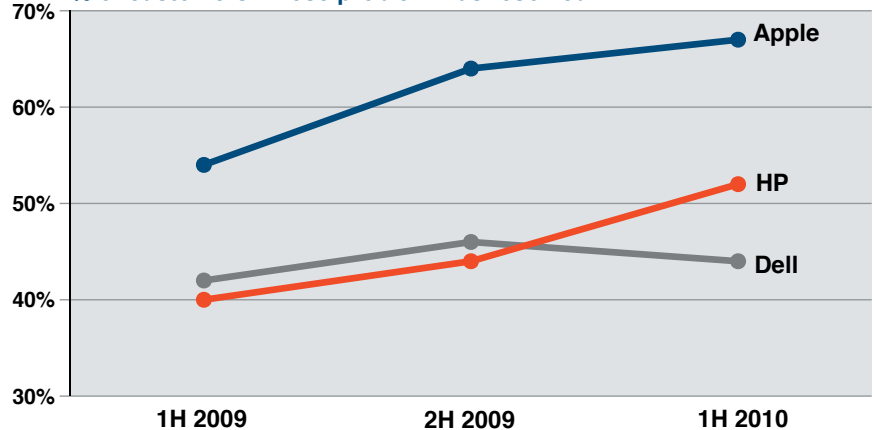
### Other Call Factors

In addition to the higher level metrics discussed above, we track a number of specific call factors to help determine the root cause of changes in the performance of the companies we follow. Most of these metrics changed only modestly from 2H 2009 to 1H 2010 (at or below the threshold for statistical significance), but there were several notable trends:

- **The percentage of customers who said their problems were resolved on the call improved for both Apple and HP.** Fifty-two percent of HP customers interviewed in 1H 2010 said their problem was resolved on the call, up 8 percentage points from 2H 2009 and 12 percentage points year over year. Apple improved by 4 percentage points in 1H 2010 and 14 percentage points year over year.
- **HP improved dramatically in the number of customers who reported the hold time required to talk to an agent was reasonable.** Ninety-three percent of HP customers interviewed during 1H 2010 said the wait time was reasonable, up 9 percentage points from 2H 2009
- **HP customers continued to be less likely to experience problems with the automated portion of the call than customers of Apple or Dell.** Only 12% of HP customers said they experienced a problem with the automated portion of the call, compared to 21% of Apple customers and 28% of Dell customers. Fewer Dell customers reported problems during 1H 2010, down 7 percentage points to 28%. As mentioned earlier this in report, 21% of Apple customers interviewed said they experienced a problem with the automated portion of the call, up 8 percentage points from 2H 2009.

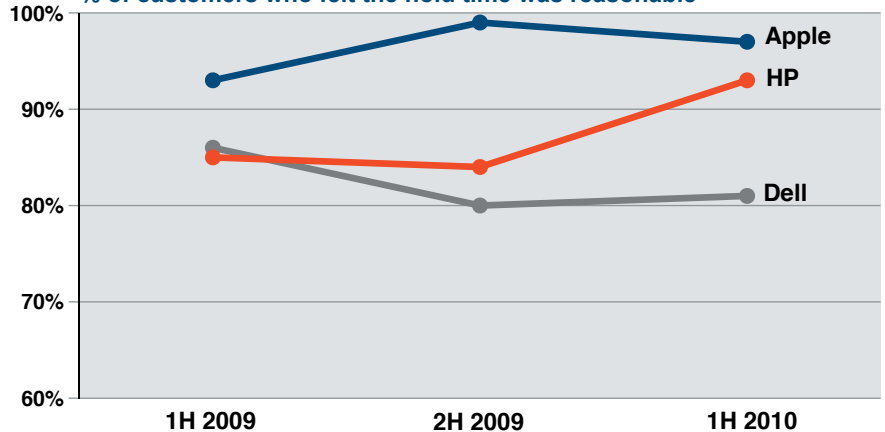
### Problem Resolution

% of customers whose problem was resolved



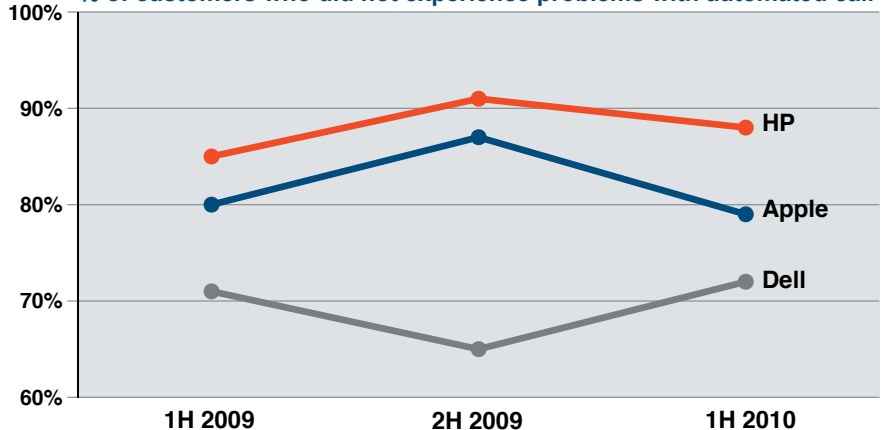
### Hold Time

% of customers who felt the hold time was reasonable



### No IVR Problems

% of customers who did not experience problems with automated call

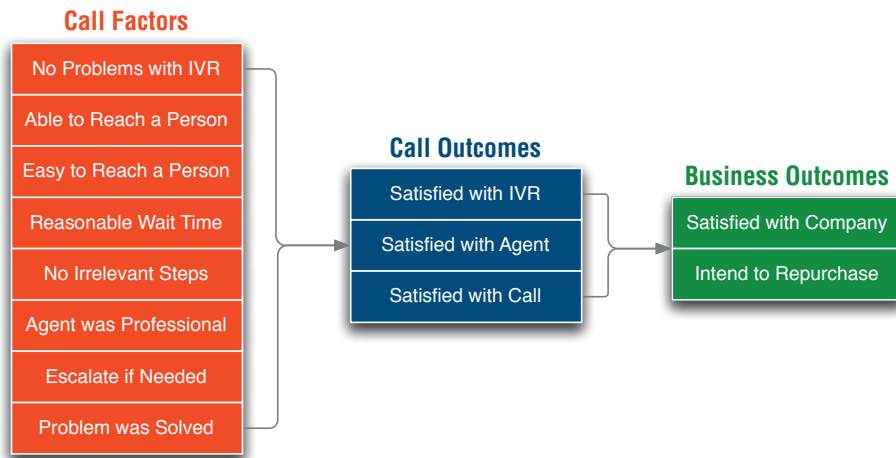




## Improving Business Outcomes through Improved Service

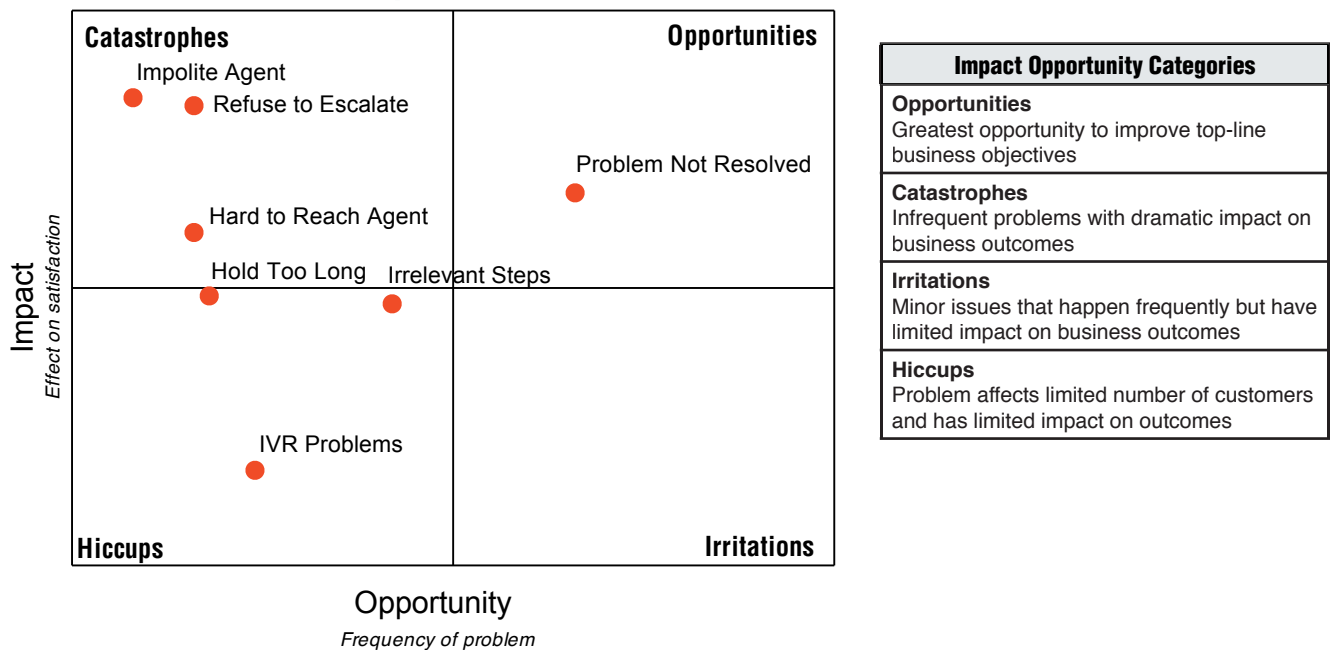
The high-level business objective in providing customer service is generally to serve the customer in the least expensive way, while having the greatest positive impact on customer satisfaction, loyalty, and willingness to recommend. To achieve this objective, it is critical to understand what factors under the company’s control may have a positive or negative impact on customer opinions, and which of these factors are more important in achieving a particular company’s business objectives.

To gain insight into these factors, we ask consumers a variety of questions relating to what happened during the customers’ support call, the customers’ opinions of the company and the customers’ opinions of the service received. We group this data by “Call Factors” (what happened during the call), “Call Outcomes” (customer opinions about the call), and “Business Outcomes” (customer opinions about the company and intent to purchase).



Our analysis of survey results focuses on determining which Call Factors have the greatest impact on Call Outcomes and, in turn, Business Outcomes. Looking at the combined results for Apple, HP and Dell from July 1, 2009 to June 30, 2010, we see that the most effective way to drive loyalty (customer intent to repurchase) is in resolving customers’ problems during the tech support call.

### Impact of Call Factors on Likelihood to Repurchase





## About the Author

Peter U. Leppik is president and CEO of Vocalabs. After several years as an investment analyst following call center technologies, he founded Vocal Laboratories Inc. in 2001 to apply scientific principles of data collection and analysis to the problem of improving customer service.

Leppik is a frequent industry speaker on the topic of measuring and improving customer service quality in call centers and automated speech environments. He is also coauthor of *Gourmet Customer Service: A Scientific Approach to Improving the Caller Experience*. Leppik has led efforts to measure, compare and publish customer service quality across a range of industries through third party, independent research, and works with industry associations to sponsor research to advance the state of the art in customer service. At Vocalabs, Leppik has assembled a team of professionals with deep expertise in survey methodology, data communications and data visualization to provide clients with best-in-class tools for improving customer service through real-time customer feedback.

Mr. Leppik holds B.S. degree in Physics from the University of Minnesota and an M.S. degree in Physics from the University of Illinois at Urbana-Champaign.



## About Vocal Laboratories Inc.

Vocalabs helps leading brands improve customer service by collecting timely and actionable feedback about customer service quality. We interview customers immediately after a customer service call, retail store visit or IVR interaction while the memory of the experience is still fresh. Using our powerful hosted survey and reporting platform, clients discover and share insights to improve business decisions.

Vocalabs' customers include Fortune 1000 companies, telecommunications carriers, industry consultants and equipment vendors. Vocalabs' award-winning services include immediate, live-agent surveys and usability testing for speech recognition and Interactive Voice Response (IVR) systems using large consumer panels. Vocalabs also conducts independent research on customer satisfaction with phone-based customer service. Vocalabs' current syndicated research covers computer technical support and mobile phone customer service. Learn more at [www.vocalabs.com](http://www.vocalabs.com).

### NCSS Data Set Availability

The National Customer Service Survey (NCSS) is sponsored and unwritten by Vocalabs to track the quality of phone-based customer service across industry verticals. Current research includes Computer Tech Support (covering Apple, Dell and HP) and Mobile Phone Customer Service (covering AT&T, Sprint, T-Mobile and Verizon).

Each full dataset, including survey results and recordings, is available on an annual subscription basis. Clients access the dataset, including survey responses and recordings, through Vocalabs' hosted survey reporting and analysis tool. Please contact us for pricing and additional information.

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