



ON-HOLD MARKETING USER SATISFACTION RESEARCH



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Research Methodology

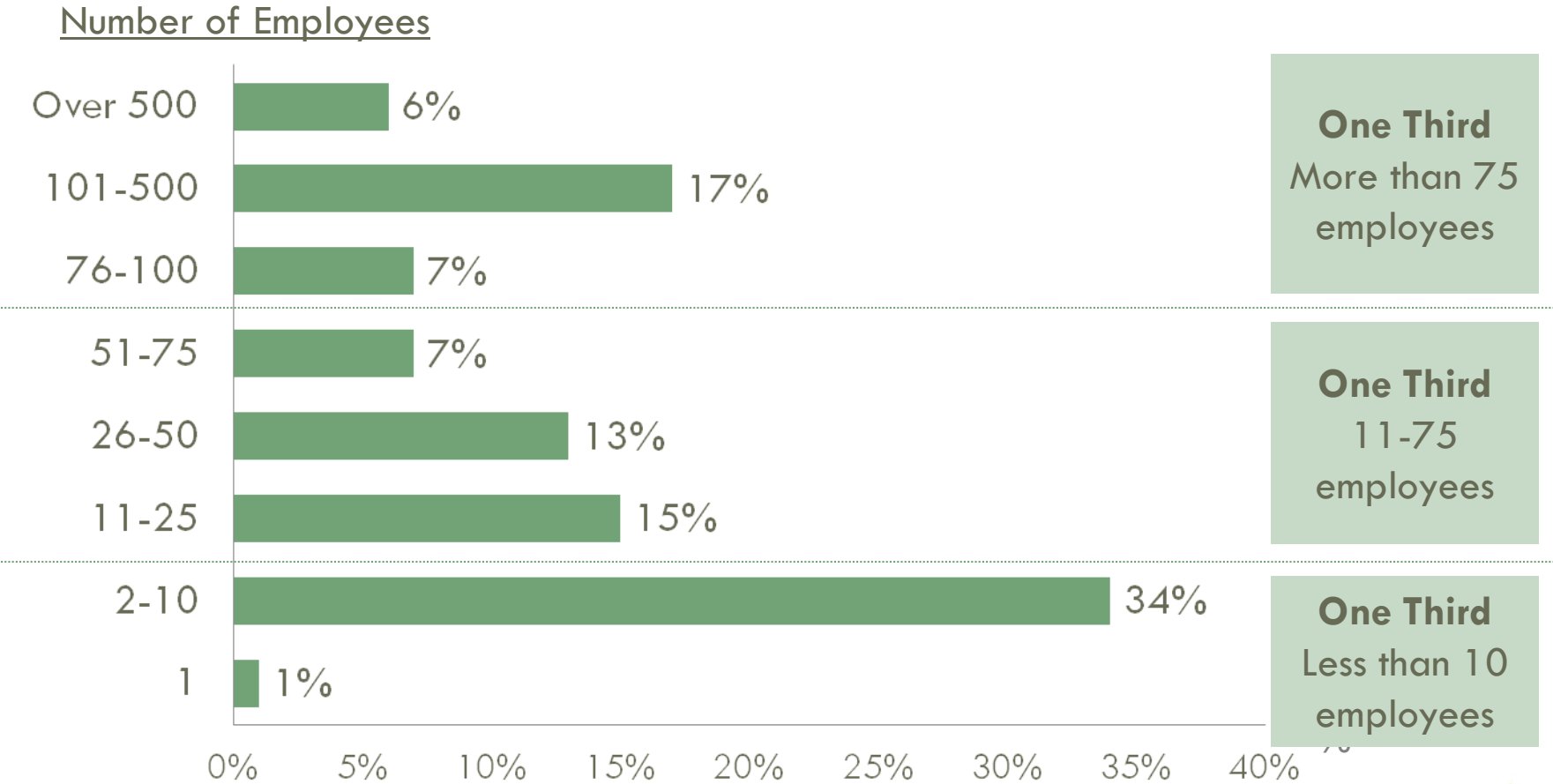
- Online survey carried-out from March 26th to April 15th, 2012
- 30 members of On-Hold Messaging and Audio Marketing Association (Europe), distributed the survey to their own clients
- Survey responses were aggregated and analyzed anonymously by Greystoke Insights
- Responses from **1,555 clients of 27 members**
- Note: this survey cannot be taken to be fully representative of all on-hold messaging users

Key Findings

- OHM users have an extremely high level of satisfaction
 - Generated by service, product quality, professional image
- On Hold Marketing provides clear marketing benefits
- On Hold Marketing can add real £Value to businesses



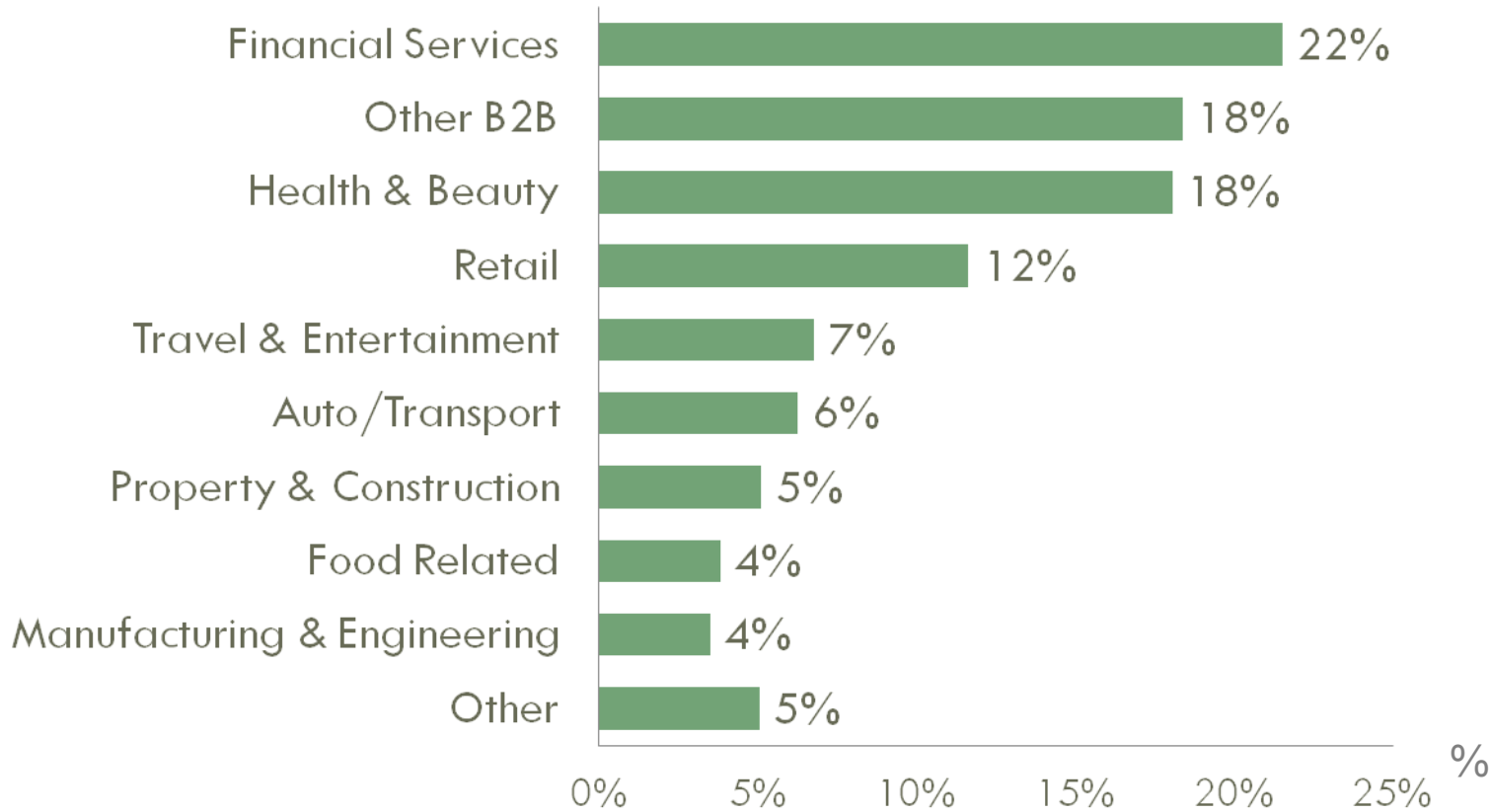
On-Hold Messaging is used by businesses of all sizes...



Qn 3: How many employees does your business have? N=1,507



...and representing a broad range of industries

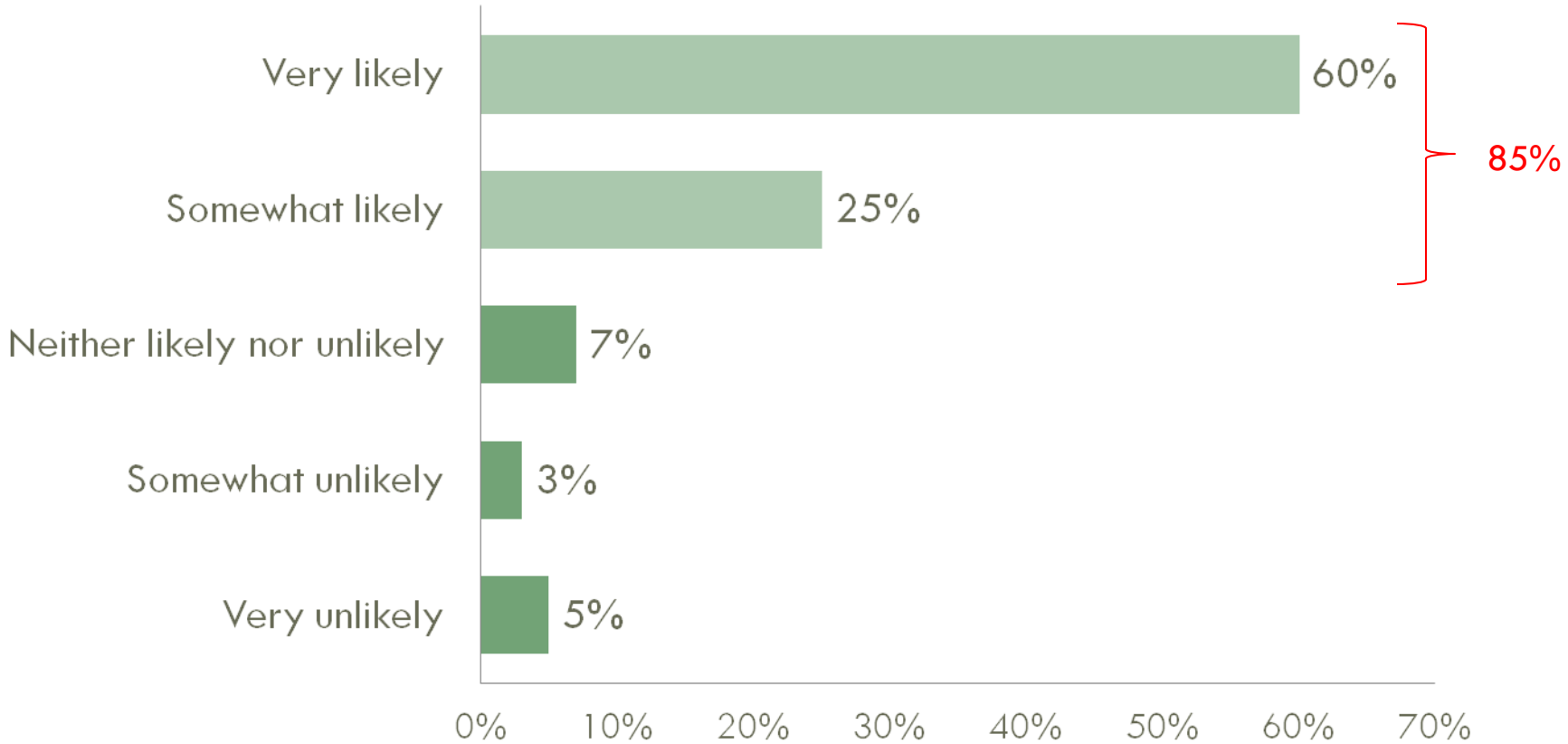


Qn 2: What is your primary line of business? N=1,548 Majority of “other” responses were recoded.



Satisfaction with On-Hold Marketing is extremely high - 85% of respondents would recommend it to others

Likelihood to Recommend On-Hold Marketing



Qn 23: How likely or not would you be to recommend On Hold messaging to other companies? N=1,474



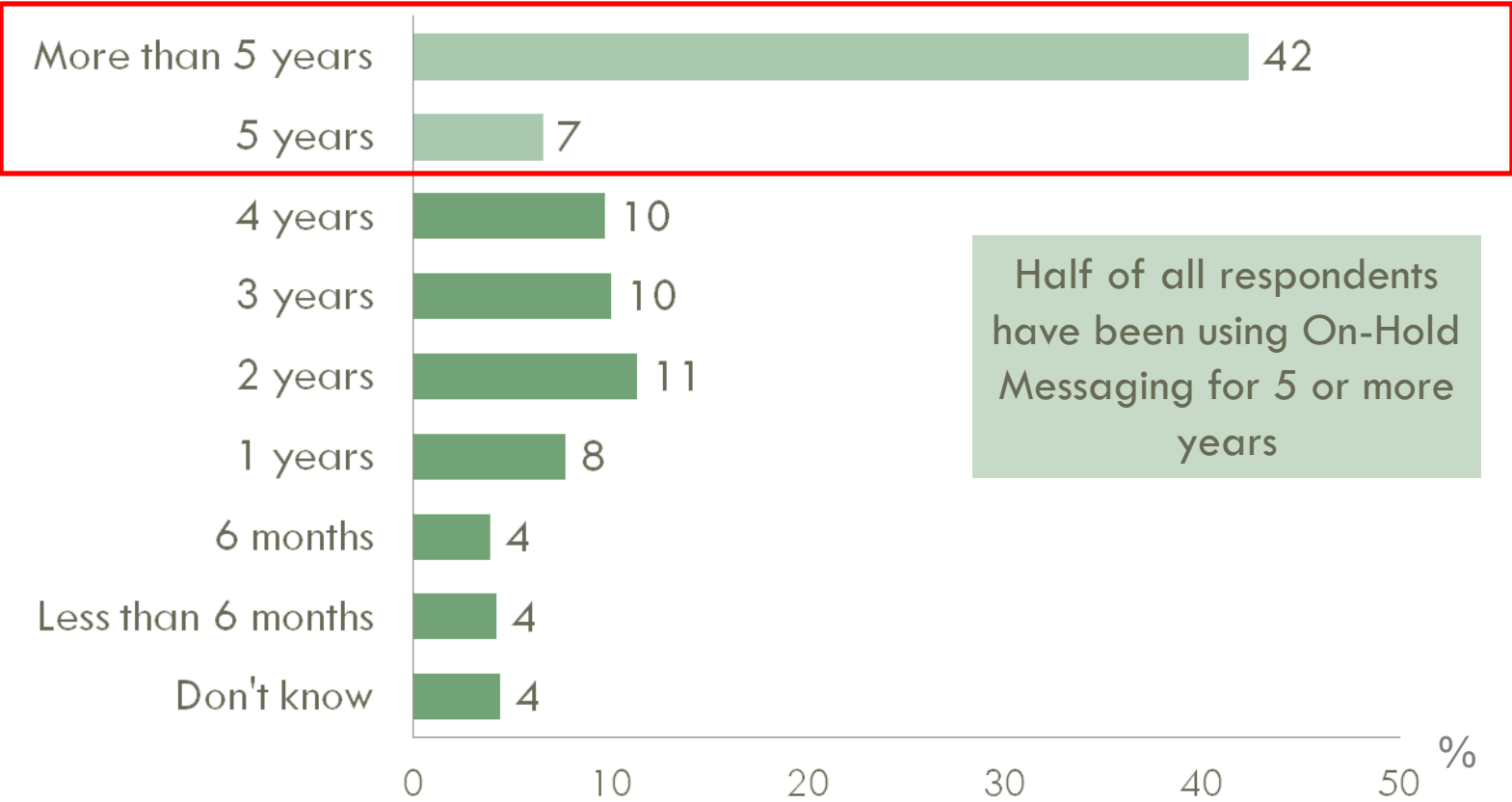
Users resoundingly believe in the value that on-hold marketing adds

It's a useful marketing tool that adds value	85%
It's nice to have, but it's not that important	12%
It's a necessary evil	3%

Qn 13: From a pure marketing perspective, which of these statements best describes how you feel about the role of your On Hold messaging program in your overall marketing mix? N=1,380



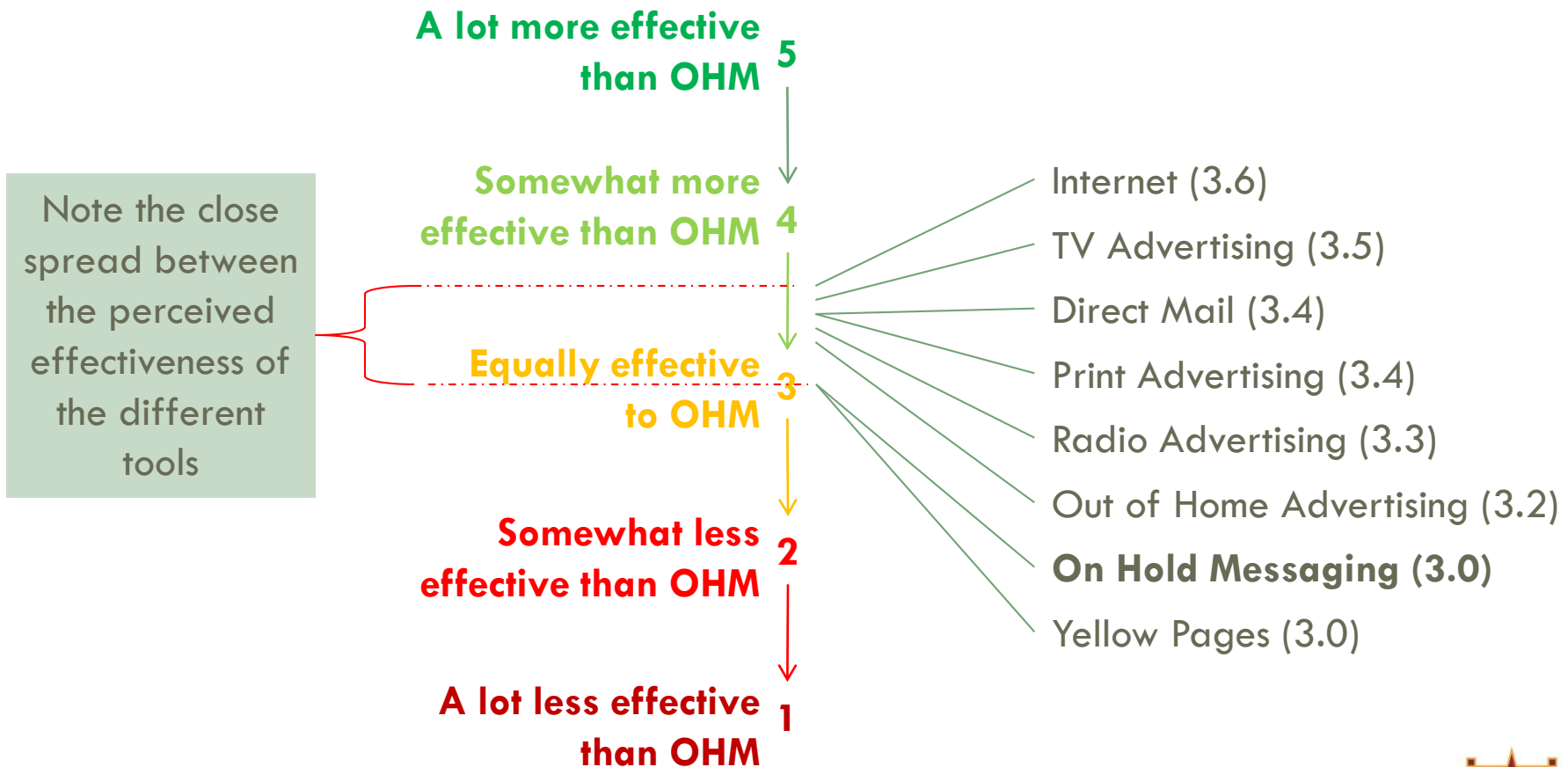
All of which leads to a high rate of client retention



Qn 1: How long have you been using On-Hold messaging at your business? N=1,554

OHM's effectiveness in growing business is regarded as equal to other key marketing tools

Perceived Effectiveness of On-Hold Messaging vs. Other Tools in Growing Business



Qn 15: How would you rate the effectiveness of your On Hold messaging in growing your business, compared to other forms of marketing you use? Please select a number from 1 to 5 for each row, where 1 is the lowest score and 5 is the highest. N=1,362

Source: Online survey to OHMA and AMA (Europe) clients, April 2012



Some of the benefits from using On-Hold Marketing – in the customers' own words...

“Reduces [callers'] stress and anxiety”

“More professional than just music- we are in sales after all”

“It is very important so the customers know that they are still on hold and haven't been forgotten about”

“It is the first contact the caller has with the organisation”

“Not having an on hold message is the equivalent of not having a company website!”

Open –end responses from Qn 13: From a pure marketing perspective, which of these statements best describes how you feel about the role of your On Hold messaging program in your overall marketing mix?.



Other reasons for recommending OHM focus on value to the business and to callers:

“I do think it is a way to get certain messages out there about sales or special events, and other services that you offer that people may not be aware of.”

“It's a natural part of the sales cycle, helps us give a non-pressure sales pitch as it entertains customers on hold.”

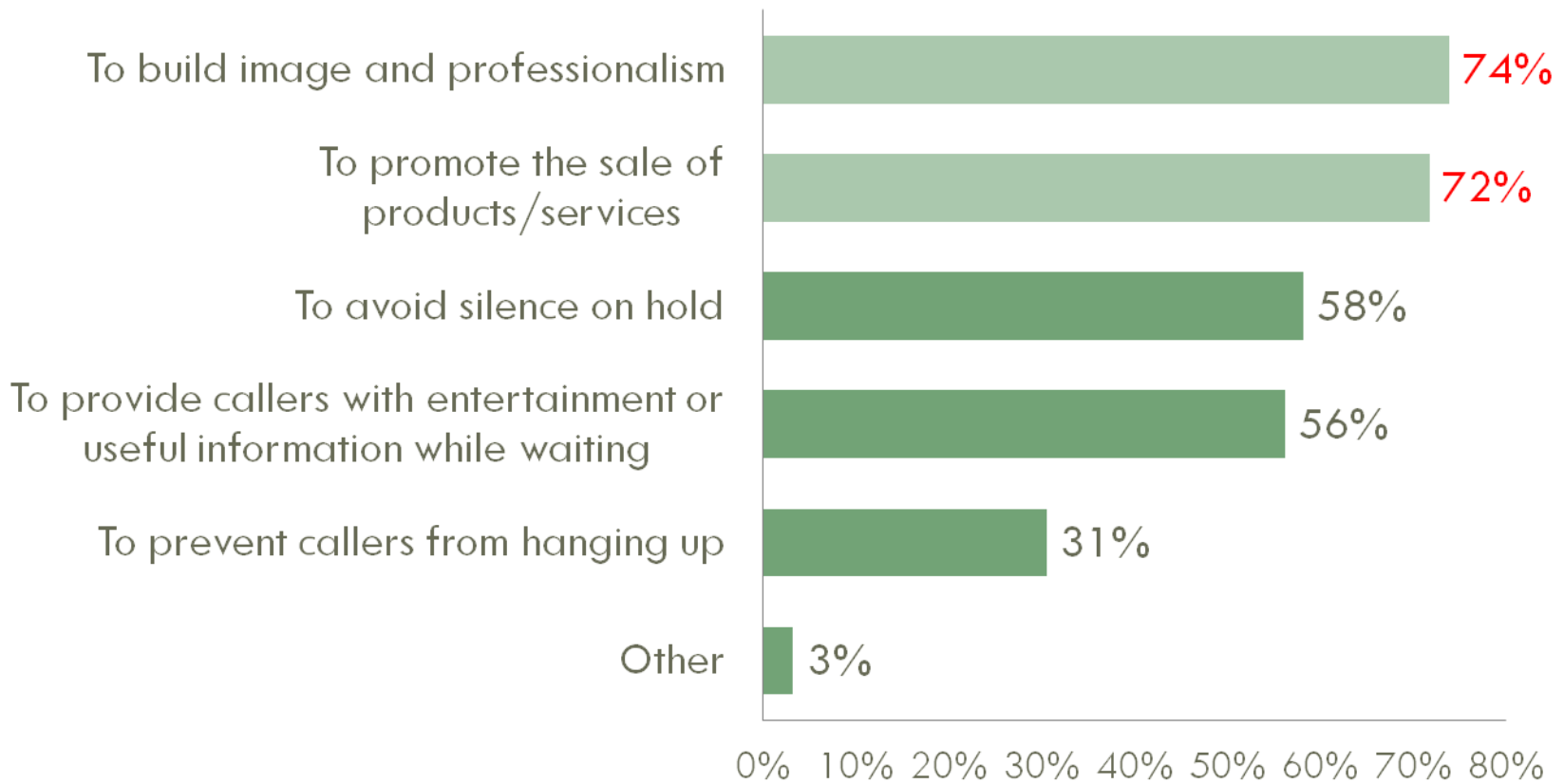
“It is irritating to sit on hold and hear nothing. Music is fine as a distraction, but to learn info about the company you are calling is important”

“It is an excellent way to promote products while customers are on hold. We have actually had customers asked to be placed back on hold to finish listening to the message.”

Qn 24: Why? [would you recommend/not recommend on-hold messaging to other companies] Top 2 box respondents from Qn 23: How likely or not would you be to recommend On Hold messaging to other companies? N=481

Customers chose to purchase OHM for both general image-building and specific marketing reasons

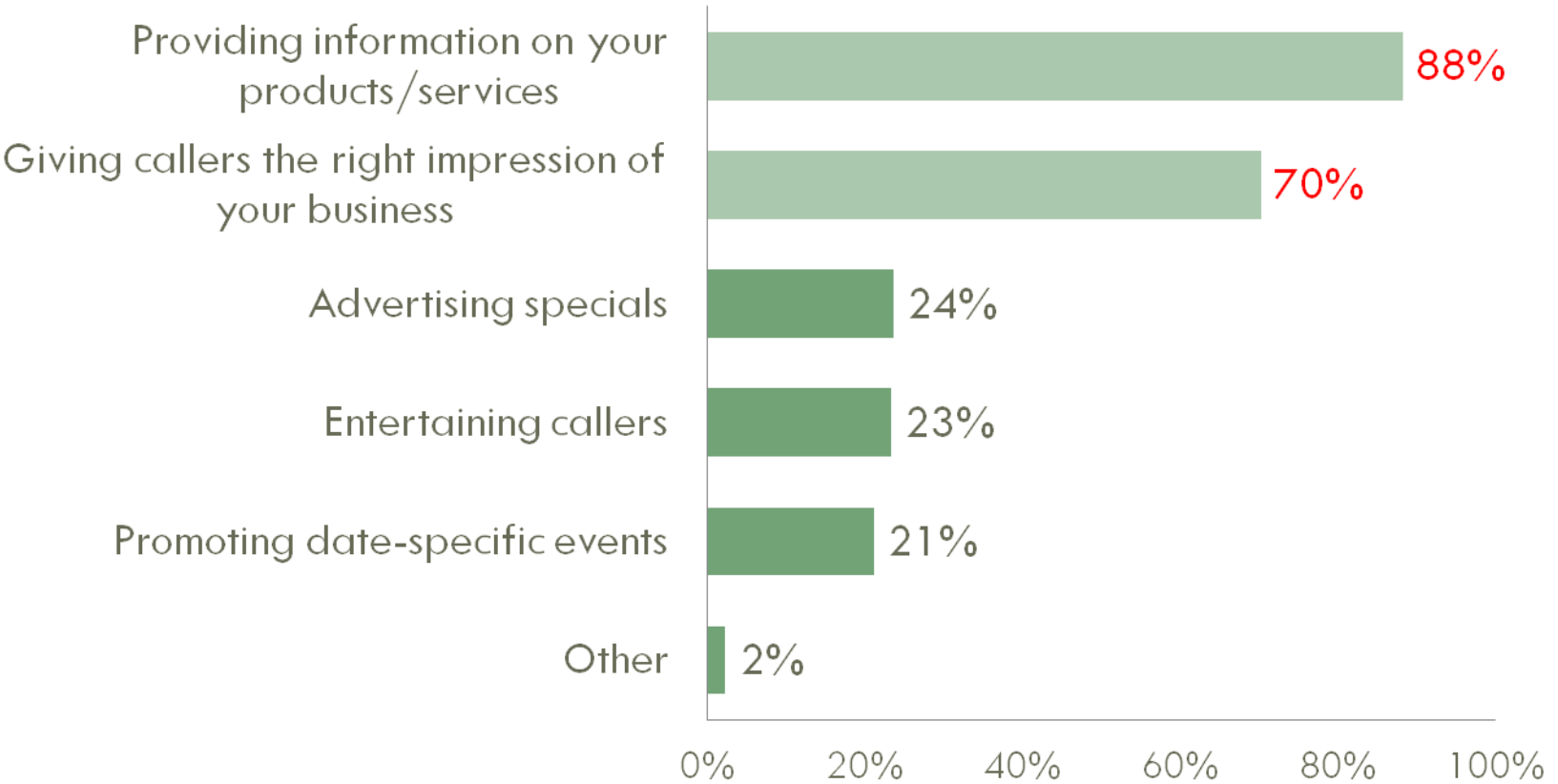
Reasons for Purchasing On Hold Messaging



Qn 10: Why did your company purchase On Hold messaging? Please select all that apply. N=1,080

This is reflected in the ways they use it today

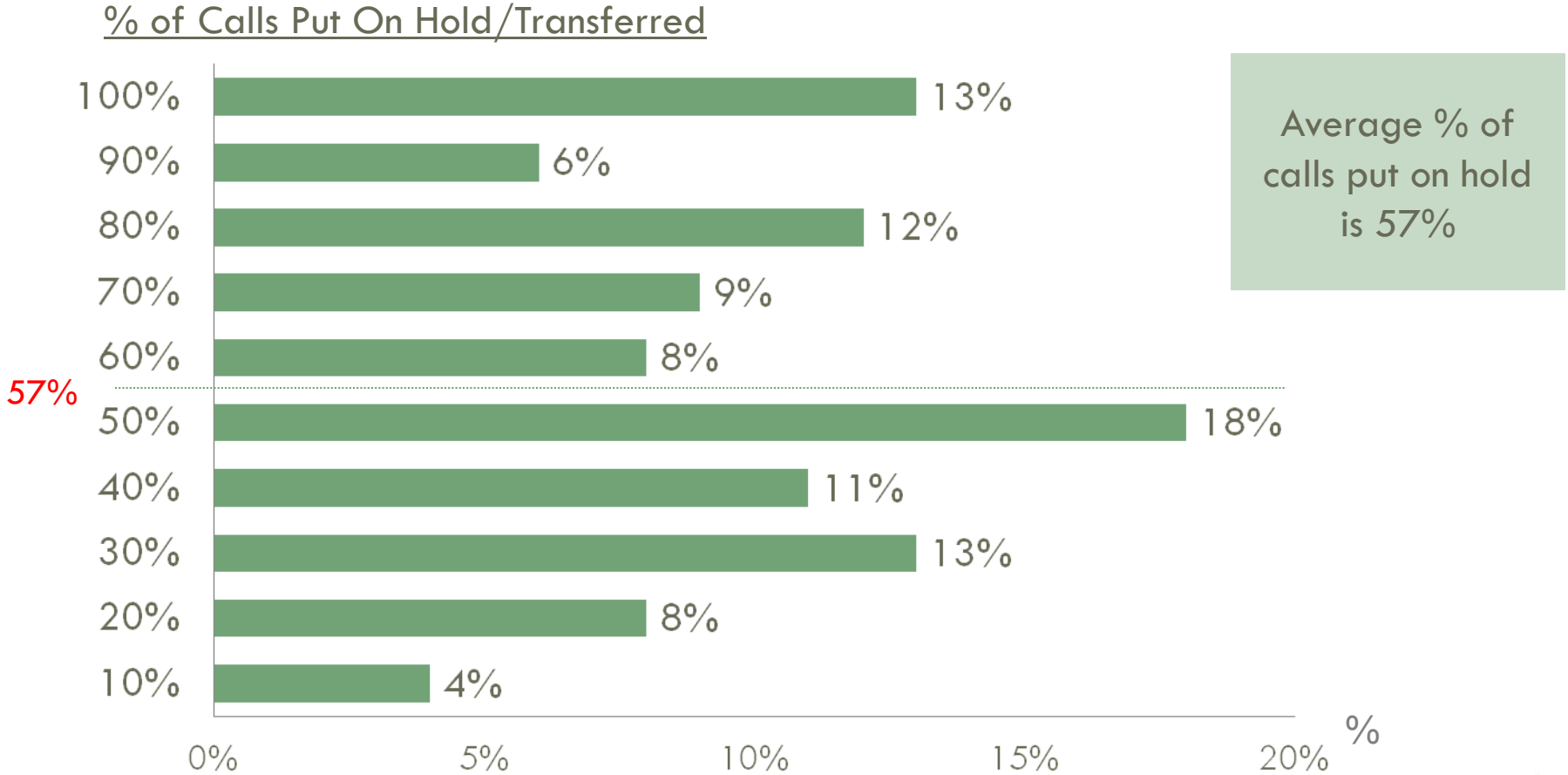
Ways in Which On Hold Messaging is Used



Qn 14: In which of the following ways, if any, do you use your On Hold messaging system? Please select all that apply.. N=1,379



The average number of calls put on hold is somewhat over 50%

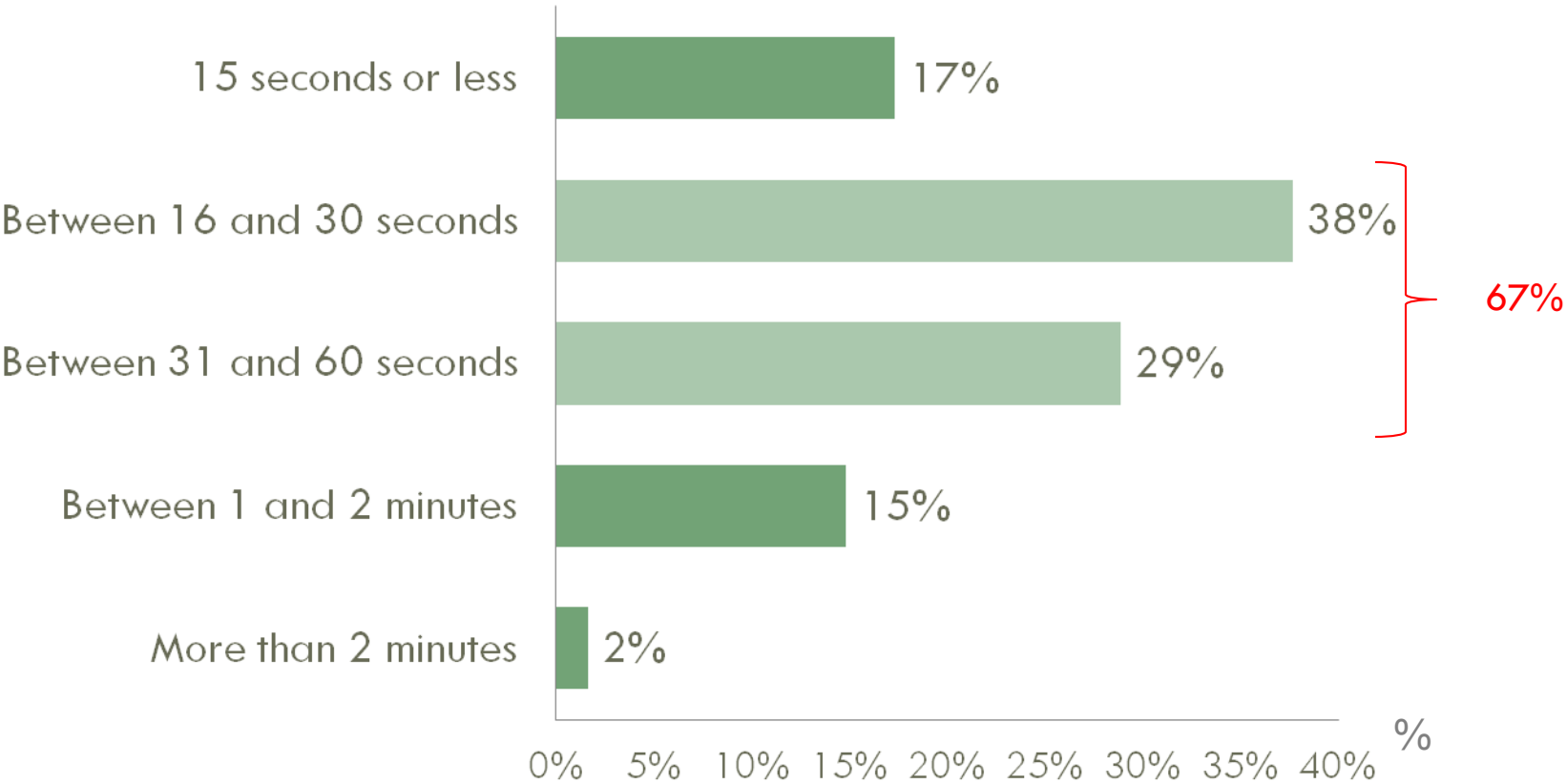


Qn 6: Out of every 10 calls you receive, how many would you estimate are placed on hold or transferred at some point during the call? N=1,511



Two-thirds of callers are on hold for between 15 seconds and a minute – long enough to hear a message, without becoming frustrated by time on hold

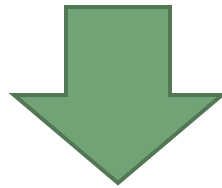
Length of Time on Hold



Qn 7: How long would you estimate your callers are typically on hold, either when they first call or when they are being transferred?
N=1,509

Typical On-Hold Client

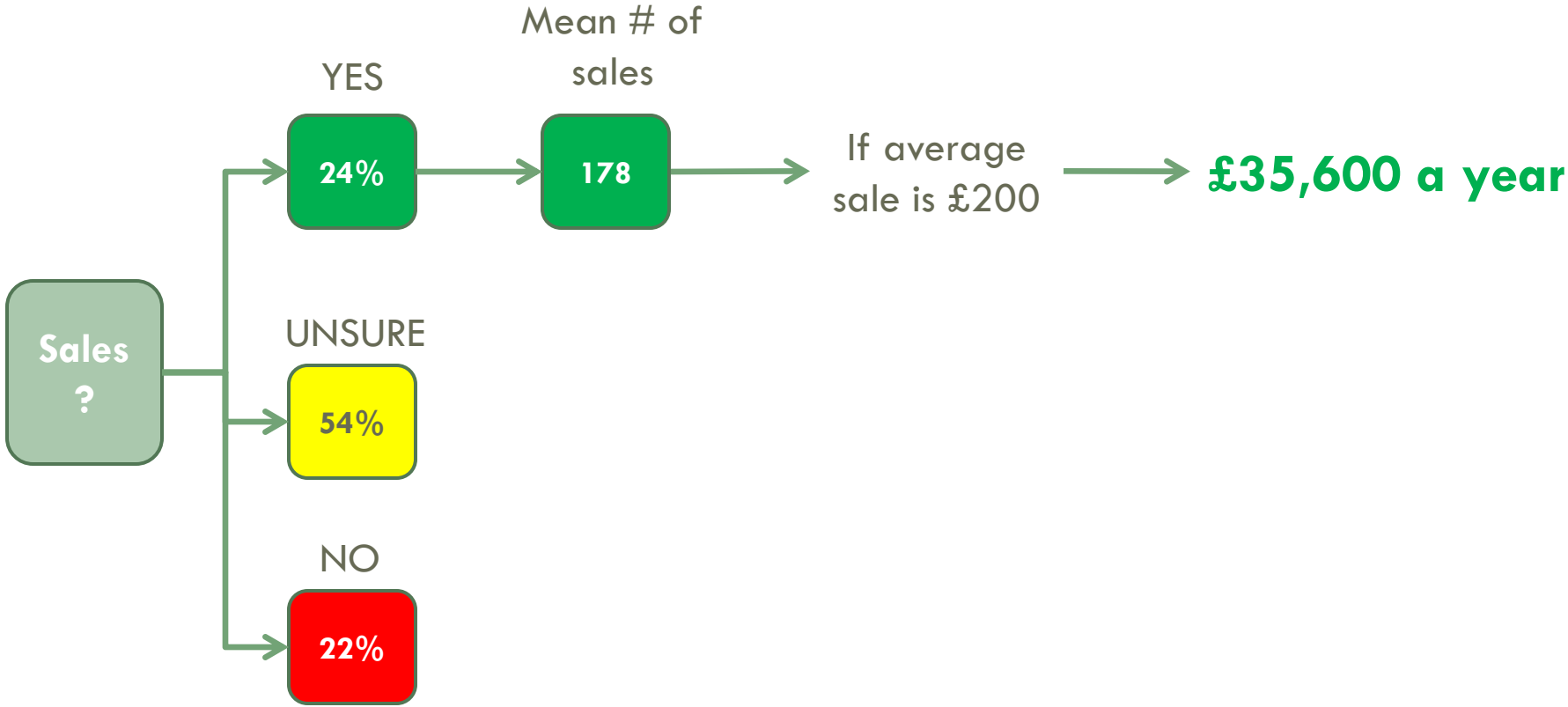
- 100 calls a day....
- 57% on hold ...
- Typical hold time of 30 seconds...



Translates to **half an hour a day, every day**, of messaging to on-hold customers

... or equivalent of **3+ weeks a year** talking directly to your customers

For at least a quarter of respondents, On-Hold Marketing generated real sales value



Qn 20 To the best of your knowledge, has your On Hold messaging been directly responsible for any sales? N=1,474;
 Qn 21: In the last year, how many sales do you estimate have been a direct result of a caller learning more about your business while on hold or waiting to be transferred? N= 221

About Greystoke Insights

Greystoke Insights leverages quantitative and qualitative research techniques to provide insight-driven solutions that help businesses achieve their goals.

Key services include:

- Consumer Insights and Marketing Research consulting
- Workshop planning and facilitation
- General strategy and management consulting

Recent project examples include:

- Quantitative research into behaviors and attitudes of Facebook visitors for leading baby products manufacturer
- Qualitative research to test concept and refine target market for new sports app
- Development and facilitation of cross-functional workshop for senior management of national casual dining chain, focusing on generating creative marketing approaches



About Arabella Pollack

- Arabella Pollack founded Greystoke Insights in 2010.
- Arabella has extensive experience in applying consumer understanding for effective decision-making. She has worked as a strategy consultant for Knowledge Networks and The NPD Group.
- She currently teaches the "In Search of Insights" course for Columbia University's Masters in Strategic Communications program.
- Before founding Greystoke Insights, Arabella was Director of Consumer Insights at Pernod Ricard.
- She managed a full spectrum of research for brands such as ABSOLUT vodka, impacting the business in areas ranging from innovation to communication strategy and portfolio management.
- Arabella holds an M.A. from Cambridge University (UK) and an M.B.A. from the Darden Business School (Virginia USA)

