

Harris Interactive Speech Satisfaction Study

*Groundbreaking research gauging consumer
attitudes towards and experiences with speech
systems*

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Introduction

Companies are continually searching for better ways to manage their enormous volumes of customer interactions, while striving to provide a more satisfying customer experience. For many companies, speech recognition is transforming the way that they “talk” to their customers.

Because it allows a natural and intuitive interaction, speech has emerged as a critical element of a company’s customer contact strategy. It provides an easily accessible and highly available automated contact method that enables customers to get information, conduct transactions, make phone calls, and more, using ordinary voice commands. What’s more, speech *complements* a company’s other contact methods such as live support and web access, and provides significant cost savings for companies.

To assess the degree to which speech systems have changed the landscape of customer interactions, Nuance commissioned the Speech Satisfaction Survey to gauge consumers’ experiences with and attitudes towards speech recognition systems.

The results of this groundbreaking survey confirm that speech systems are now widely used and accepted by the general population, that consumers are highly satisfied with their speech experience, and that speech provides significant advantages over other interaction methods including telephone keypad or touch-tone systems, email and Web.

Study confirms that:

- *Speech is widely used and accepted*
- *Consumers are highly satisfied with their speech experiences*
- *Speech provides many advantages over other interaction methods including touchtone, email and the web*

Methodology

The survey was commissioned by Nuance and conducted by Harris Interactive, a worldwide market research and consulting firm, best known for *The Harris Poll*[®] and for its pioneering use of the Internet to conduct scientifically accurate market research.

In March 2003, Harris Interactive completed a total of 326 interviews with a sample that reflects the general population of the U.S. Participants were screened to include individuals who have completed a transaction via a speech recognition program within the past three months. Figures for age, sex, race, income, education and region were weighted where necessary to bring them into line with their actual proportions in the population.

Since this survey drew responses from among the total population, and not merely from among users of specific speech systems, it presents a broad and more objective picture of consumers’ experiences with voice-driven systems.

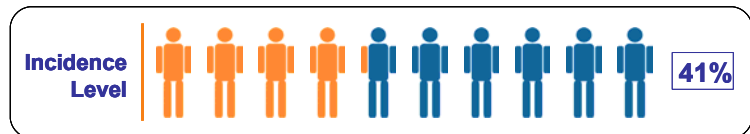
In theory, with probability samples of this size, one could say with 95 percent certainty that the results have a statistical precision of plus or minus five percentage points of what they would be if the entire adult population had been polled with complete accuracy. This online survey is not a probability sample.

Findings

High incidence rate signals mainstream usage of speech systems

As more and more companies choose speech recognition to assist customers, the numbers of speech

users in the general population continues to grow. In fact, 41 percent of people surveyed have used a speech system in the past three months, and among this group, 66 percent encounter speech regularly. Clearly, consumers are becoming more accustomed to and accepting of speech as a method for doing business with companies.

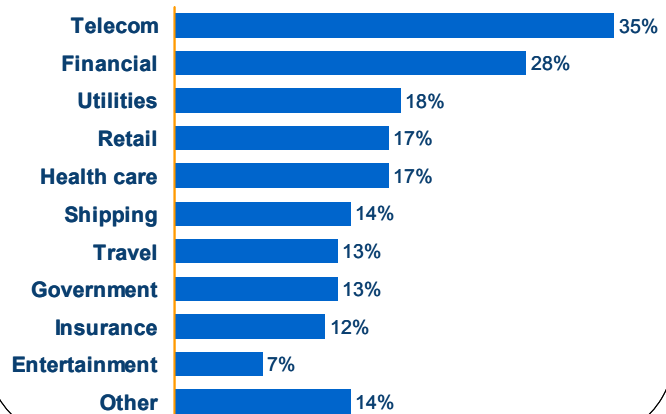


Speech has entered the mainstream and made inroads into a diverse range of industries. From telecommunications and financial services speech systems – where speech is most often encountered – to utilities, healthcare, shipping, government services and travel where speech solutions are becoming relatively commonplace.

The most widespread speech applications allow callers to reach customer service or to get information about their accounts. Other common

speech applications include telephone directory assistance, airline flight status information, and automated bill pay applications.

What industries are associated with the speech systems you've encountered?

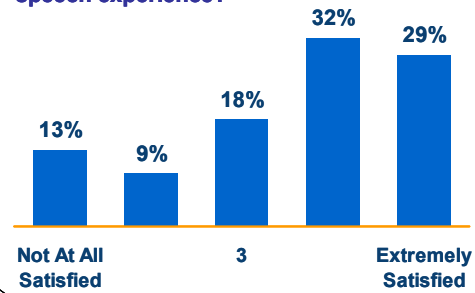


Speech users are highly satisfied, and likely to use speech again

Businesses are choosing automated speech applications because they allow customers to interact in a more natural fashion than cumbersome keypad or touch-tone systems. It's no surprise, then, that the majority of speech users (61 percent) are highly satisfied with their most recent speech encounter.

Moreover, speech users' current satisfaction levels are directly related to their likelihood to use speech in the future. Fifty-six percent (56%) of users indicated that they will

How satisfied were you with the overall speech experience?



“definitely” or “probably” use the speech system again, while only 7 percent said they would not use the system again.

Speech users also gave high marks for speech functionality, with more than 70 percent of users agreeing that speech systems were easy to use and understand, and almost two-thirds concurring that speech systems were efficient and provided what they needed.

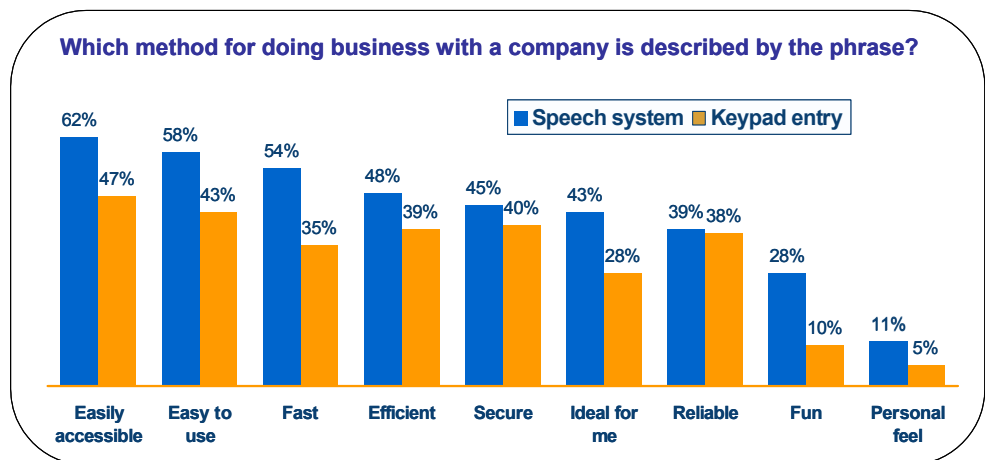
Survey respondents validated a variety of speech benefits. More than 75 percent stated that speech was convenient and easily accessible, and two-thirds agreed that speech, provided accurate information, and eliminated time spent waiting for live agents.

Overall, companies deploying speech systems are not only finding that customer satisfaction levels are improving, but that a high percentage of repeat users are driving greater efficiencies.



Consumers indicate clear preference for speech

Respondents agreed overwhelmingly that speech systems deliver advantages over other forms of customer interaction. Those advantages were most striking when comparing speech to keypad entry systems. Users described speech systems as easier to access and use, faster, and more efficient than keypad entry systems.



Furthermore, nine out of every ten consumers said they derive greater value from using a speech system, versus a traditional keypad system, and 70 percent said their overall experience would be improved if speech technology were used instead of touch-tone menus.

Speech systems also compared favorably with other customer contact methods, including “live” support and online access. Again, consumers recognized that speech systems are faster, easier and more accessible than a live agent. They also felt that speech provides greater speed and accessibility over web/online access.

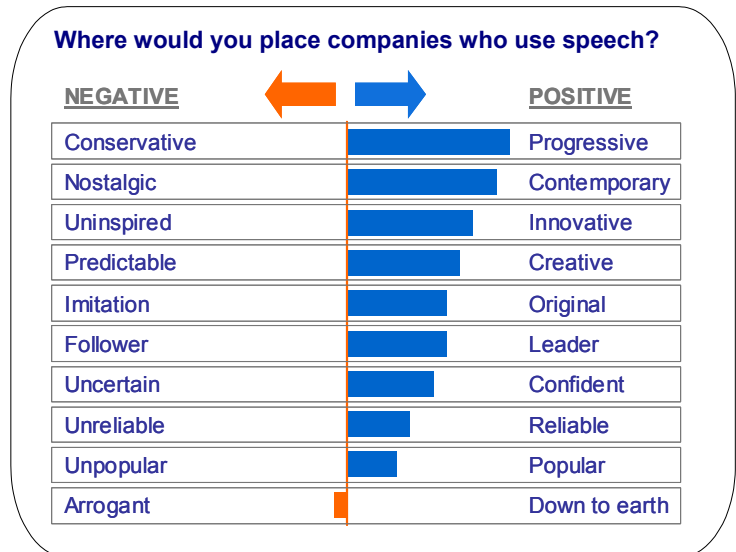
Implications for companies deploying speech

Harris’ Speech Satisfaction Study provides strong affirmation of consumers’ attitudes toward speech technology. Presently, a sizeable portion of the U.S. population, representing a broad demographic, encounters speech systems on a regular basis. These speech users are comfortable, confident and highly satisfied with their speech experiences and, as a result, they plan to use speech systems again in the future.

Positive experiences with speech systems translate into positive views by consumers towards the companies that employ them. Respondents consistently chose decidedly upbeat words to describe companies using speech. “Progressive,” “contemporary,” and “innovative” were just a few of those chosen by consumers.

Accordingly, companies deploying speech are reaping substantial benefits. A consistent and friendly speech interface results in more satisfied customers and a more stable customer base. Moreover, the success and acceptance of speech systems increases automation rates, effectively reducing call volumes and the associated costs of handling customer calls.

With further innovations in speech systems, and as companies identify more creative applications for the technology, we’ll see an even greater availability of speech solutions that delight and satisfy consumers.



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