TOA TECHNOLOGIES

Overview

Waiting at home for a service or delivery appointment has long been a customer service frustration for Americans. Until now, this frustration has never been quantified. TOA worked with Harris Interactive, to survey Americans on the true cost of waiting.

In June, Harris Interactive conducted a national consumer survey to measure the economic impact of long appointment wait windows. In the current economic climate, providing excellent customer service has become more important for businesses looking to retain their customers and their revenue. Meanwhile, consumers have raised their expectations of how they will be treated by the companies they do business with.

The TOA Technologies 2009 Cost of Waiting Survey polled more than 2,200 Americans from around the country to measure the impact of excessive waiting on consumers and companies.

The summary of findings

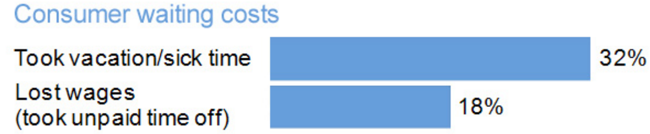
1. Long wait-windows are costing consumers and service providers money

- Nearly 1 of every 5 consumers (18%) have lost wages (taken unpaid time off) to wait for a service or delivery in their home in the first 6 months of 2009
- One third (32%) of consumers have taken a vacation day or sick time to wait for the cable guy or some other service in their home in the first 6 months of 2009
- 18% have refused or cancelled a product/service because the service/delivery person was late or didn't show
- 29% have left their home in frustration (costing their service provider more money in rescheduling, customer service and operations costs) because the cable guy or delivery person was late

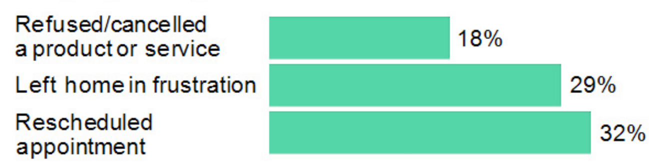
2. Consumers blame their service companies

- 57% say the company providing the service is at fault if the delivery/service is late or doesn't show, vs. 19% who blame the actual driver or service technician
- 37% of consumers believe that the standard wait-window is 4-8 hours because companies "take advantage of the fact people will most likely wait for the service/delivery because they want/need it"

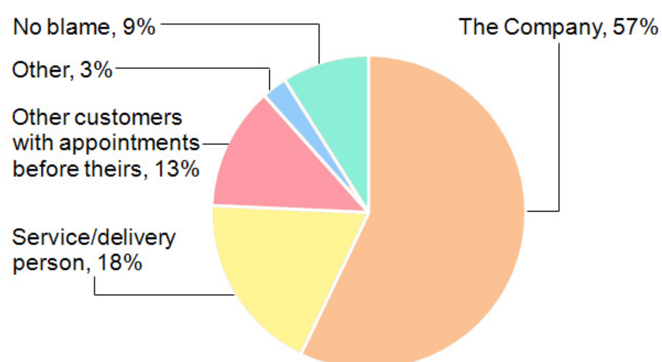
Consumer waiting costs



Company waiting costs



When appointments are late, who gets blamed?



Based on a survey conducted by Harris Interactive for TOA Technologies, June 2009

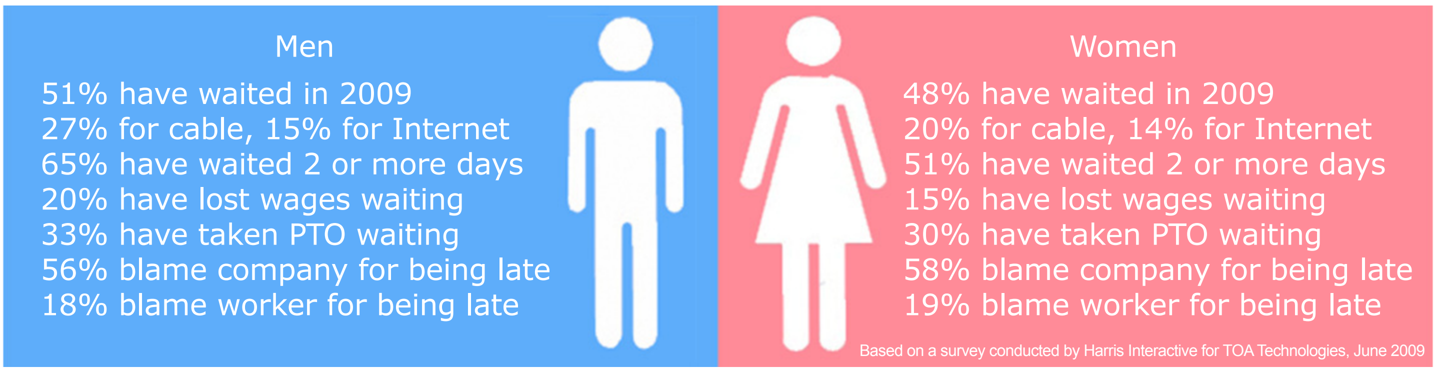
3. This is a nationwide problem

- Nearly half (49%) of Americans have waited for some form of service in their homes in the past six months
- 82% say they wait on average at least 1 day per year in their homes for service or deliveries
- 63% wait on average 2 or more days per year in their homes for service or deliveries

Other interesting findings

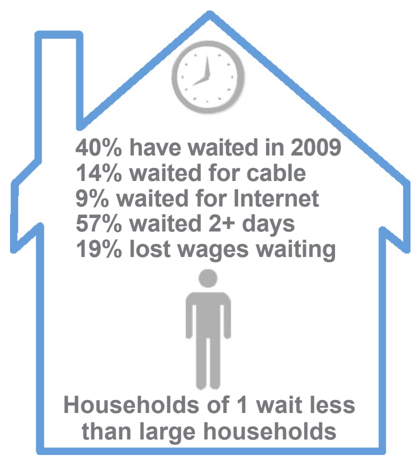
The cost of waiting: The Gender Gap

- Men wait for cable more than women – 27% vs. 20%
- Men spend more time waiting for appointments than women – 65% of men have waited 2 or more days vs. 51% of women
- More men have lost wages waiting (20%) than women (15%)



The Generation Gap

- In general, more people 55 and older (58%) have waited in 2009 than people 18-34 (44%); however, for Internet service appointments, people 18-34 waited more (18%) than people 55+ (12%)
- Respondents 55 and older were more likely to blame the company for late appointments than people 18-34 (57% vs. 49%)
- Respondents18-34 were more likely to blame the individual worker for a late appointment than people 55+ (24% vs. 16%)
- People 55+ are more frustrated with customer service than those 18-34; 97% want improvements in service vs. 84% of people 18-34; 82% want a call when the worker is on the way vs. 57%; and 41% think companies take advantage of people vs. 29%

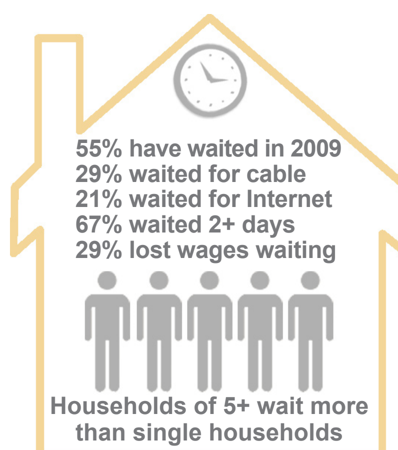


More Money, More Problems?

- Households with incomes over $75,000 had generally waited more in 2009 (60%), for longer periods of time (73% 2 or more days) and had taken more PTO (39%) than the national average or any other income level
- 28% of >$75,000 households waited for cable, vs. 20% <$35,000 and 23% nationally
- With all the time spent waiting, it's not surprising that 66% of households earning more than $75,000 want a reduction in wait times, vs. 47% in less than $35,000 households and 57% nationally

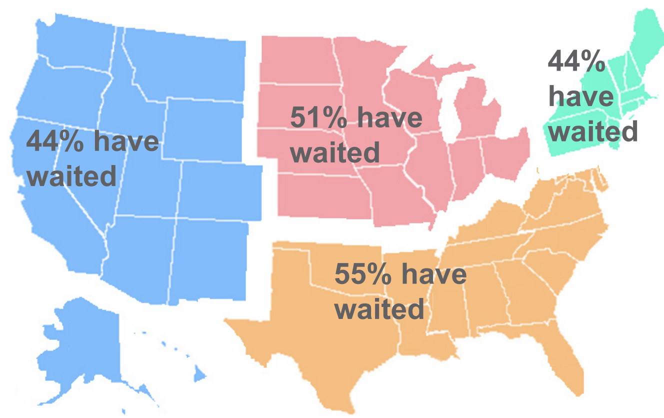
The Full House Factor

- Families wait more, and at greater expense, than single people
- Households with 5+ members generally wait more than single people – 55% vs. 40%
- 14% of single people waited for cable and 9% for Internet vs. 29% and 21% respectively for 5+ households
- 67% of 5+ homes vs. 57% of single people waited 2 or more days in past year, and 29% vs. 19% lost wages
- However, larger households appear less frustrated than single people – 50% blame the company for being late vs. 58% of single people; 88% want any customer service improvement vs. 94%; 29% think companies take advantage of them vs. 41%; and 64% want a phone call when the worker is on the way vs. 77% of single people



Location, Location, Location

- Residents in the South have waited more than residents in any other region – 55% vs. 51% Midwest and 44% West and Northeast. The national average is 49%
- Midwest residents have taken less PTO to wait for appointments than other locations – 27% vs. 32% South and West, and 34% Northeast
- More people living in the West lost wages (22%) from waiting than other regions – 15% Midwest and 17%Northeast and South
- Midwest respondents were more likely to blame a worker for being late (23%) than any other region – 16% Northeast, 17% West, 18% South
- People in the South waste more days waiting than others – 68% have waited 2 or more days vs. 57% West, 59% Midwest, 61% Northeast



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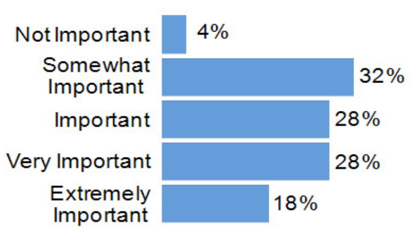
Cutting wait times to 1 hour is...



96% - somewhat important or more
74% - at least important
46% - very important or extremely important

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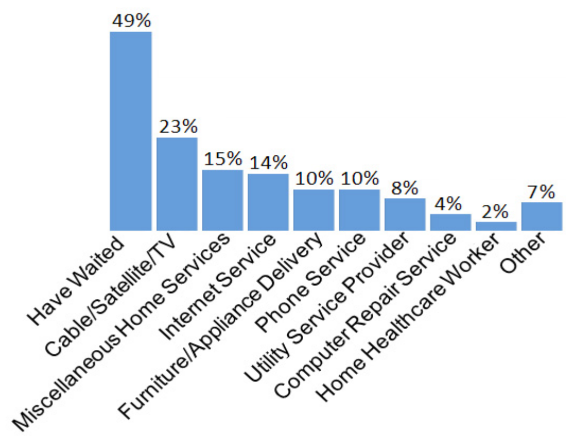
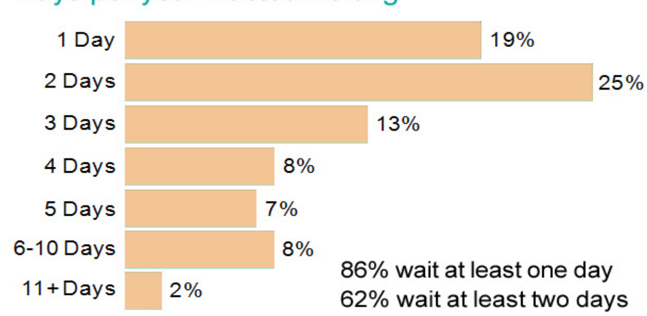
What consumers wait for



Days per year wasted waiting



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About TOA Technologies

TOA Technologies is the leader in Software-as-a-Service (SaaS) solutions for customer-focused mobile workforce management. TOA's solution is a complete system for better managing the mobile workforce, providing advanced tools for planning, routing, dispatching, business intelligence and ground-breaking predictive customer communications. TOA's system deploys quickly, provides Web-based flexibility and delivers unparalleled cost savings, immediate Return on Investment, increased productivity and a dramatically enhanced customer experience. Recently named a Visionary in Gartner's annual 2009 Magic Quadrant for Field Service Management, TOA Technologies is headquartered in Cleveland, Ohio, with offices in Amsterdam, The Netherlands.

For additional information please visit **www.toatech.com**.

About Harris Interactive

Harris Interactive is a global leader in custom market research. With a long and rich history in multimodal research, powered by our science and technology, we assist clients in achieving business results. Harris Interactive serves clients globally through our North American, European and Asian offices and a network of independent market research firms.

For more information, please visit **www.harrisinteractive.com**.

Methodology

- Conducted by Harris Interactive, June 22-24, 2009
- Respondents 2,261 respondents
- Online survey methodology using random national household sample
- Some numbers may not equal 100 percent due to rounding or because question was not answered by all respondents

Demographics of all respondents

Gender Male – 48% Female – 52%

Age	18-34	31%	35-44	17%
	45-54	21%	55+	31%

Income	Less than $35,000	24%
	$35,000 - $49,999	12%
	$50,000 - $74,999	16%
	More than $75,000	33%

Children In Household

Have Children In Household:	30%
Do Not Have Children In Household:	70%

Household size	1	20%
	2	37%
	3-4	33%
	5+	10%