2018 Customer Experience (CX) Transformation Benchmark

Global Consumers:
United States, United Kingdom, Australia
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## Regional Findings
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Companies of all sizes now compete in the experience economy to attract new customers and build customer loyalty and advocacy. No longer able to rely on product quality or price, companies must consistently deliver exceptional customer experience to drive bottom line growth.

With fierce competition and dozens of service channels available, customer service leaders have to continuously monitor and improve customer experience while also expanding their service channels and fine-tuning their contact center operations to meet consumer demand for speed, convenience and personalization.

The second annual NICE inContact Customer Experience (CX) Transformation Benchmark reports on more than 2,400 consumers’ most recent customer service experience across 11 different channels – both Agent-assisted and Self-service – on over 4,600 total interactions.

This is the only research study that measures real-world consumer experiences including satisfaction, loyalty and advocacy, including Net Promoter Score® (NPS), by communication channel.

The 2018 CX Transformation Benchmark covers six customer service dimensions:

- Channel Usage – Agent-assisted and Self-service
- Customer Experience (CX) – satisfaction
- Channel Preferences
- Customer Experience – attitudes
- Channel Influence on Net Promoter Score®
- Artificial Intelligence and Automation – usage, preference, satisfaction and attitudes

Country-specific information is available for United States, United Kingdom and Australia. Comparison of 2018 with 2017 results are available for United States.
Major Findings

**Consumer Attitudes about CX**

The 2018 NICE inContact Customer Experience (CX) Transformation Benchmark reveals that consumers expect more and are willing to buy more from companies that deliver exceptional customer experiences. They are also willing to switch companies due to poor customer service.

- 89% of consumers are willing to buy more and 82% are willing to go out of their way to buy from companies that deliver exceptional customer experience
- 80% of consumers are willing to switch companies due to poor customer service

**Omnichannel Service and Satisfaction**

Consumers want true omnichannel customer service, and service that’s seamless, convenient and quick. But, only 35% are highly satisfied with their experience.

- 9 in 10 consumers want true omnichannel service – they expect a seamless experience when moving from one communication method to another, such as phone to text or chat to phone
- Only 35% of consumers are highly satisfied* with their experience, regardless of channel and country surveyed

**Usage of Agent-assisted, Self-service Channels**

Customer service agents remain vital to delivering exceptional experiences, with phone comprising 49% of all interactions. Consumers across all regions use Agent-assisted channels twice as often as Self-service. Self-service channel use as a whole in the US almost doubled.

- 68% of all interactions were Agent-assisted
- 49% of all consumers surveyed used phone in their most recent interaction**
- 83% of customers that used Self-service channels, also, separately, used Agent-assisted channels
- 61% of customers that used Agent-assisted channels, did not use any Self-service methods in the last 3 months
- In the US, Self-service use almost doubled from 17% in 2017 to 31% in 2018
- 32% and 34% of all interactions, in the UK and Australia respectively, were via Self-service channels
- Phone and chat are used more frequently in the US than in UK and Australia; email is more utilized in UK, and company website is more utilized in Australia
- 22% or over 1 in 5 interactions were regarding a purchase

*Highly satisfied = 9-10 rating out of 10
**Respondents reported channel used for their two most recent service experiences

35% Only 35% are highly satisfied with their experience
Channel Preferences

Consumers are using both Agent-assisted and Self-service channels and still prefer Agent-assisted options such as phone, email and chat. Company website and mobile apps are the top two most preferred Self-service channels. The least preferred channels are social media, and automated assistant and video chat.

- 66% of consumers prefer Agent-assisted customer service, with phone, email, and chat leading the way
- In the US, preference for Agent-assisted decreased from 67% in 2017 to 64% in 2018 with preference for Self-service increasing
- Channel preferences are similar across US, UK and Australia

Chatbots / Automated Assistants

Use of and satisfaction with automated assistants for customer service is low.

- Only 8% of consumers interacted with a virtual assistant on their mobile phone or home electronic device
- A full 90% of customers prefer to talk to a live service agent over a chatbot
- 79% of respondents said chatbots and virtual assistants need to get smarter before they will use them regularly
- 66% disagree that chatbot and virtual assistants make it easier to get issues resolved

Channel Influence on Net Promoter Score®

Overall Agent-assisted and Self-service channels are about equal in their impact on Net Promoter Score®. Channels that drive Net Promoter Score® the most strongly are chat, mobile apps and company website. These lead to the higher likelihood of recommending a company or continuing to do business with that company.

- Net Promoter Score® varies by country with significant differences and notable improvement in the US compared to 2017 scores in the US.

US
Agent-assisted 12 vs Self-service 23 (up from 3 and -2 respectively in 2017)

UK
Agent-assisted -1 vs Self-service -4

Australia
Agent-assisted -1 vs Self-service -9
## Comparison of Global Findings

<table>
<thead>
<tr>
<th>Channels</th>
<th>% Usage</th>
<th>% Satisfaction (9/10)</th>
<th>% Preference (top 3 rank)</th>
<th>NPS®</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone, live rep</td>
<td>49</td>
<td>37</td>
<td>69</td>
<td>7</td>
</tr>
<tr>
<td>Email</td>
<td>32</td>
<td>28</td>
<td>58</td>
<td>-9</td>
</tr>
<tr>
<td>Chat</td>
<td>28</td>
<td>44</td>
<td>53</td>
<td>21</td>
</tr>
<tr>
<td>Website</td>
<td>24</td>
<td>41</td>
<td>50</td>
<td>14</td>
</tr>
<tr>
<td>Mobile app</td>
<td>16</td>
<td>44</td>
<td>21</td>
<td>25</td>
</tr>
<tr>
<td>Automated phone menu</td>
<td>15</td>
<td>27</td>
<td>20</td>
<td>-26</td>
</tr>
<tr>
<td>Text</td>
<td>10</td>
<td>35</td>
<td>11</td>
<td>-2</td>
</tr>
<tr>
<td>Social Media</td>
<td>9</td>
<td>26</td>
<td>10</td>
<td>-10</td>
</tr>
<tr>
<td>Automated, virtual assistant on mobile phone</td>
<td>7</td>
<td>27</td>
<td>9</td>
<td>n/a</td>
</tr>
<tr>
<td>Video chat</td>
<td>4</td>
<td>n/a</td>
<td>5</td>
<td>n/a</td>
</tr>
<tr>
<td>Home electronic virtual assistant</td>
<td>1</td>
<td>n/a</td>
<td>4</td>
<td>n/a</td>
</tr>
</tbody>
</table>
Channel Usage

What channels are consumers using, and for what kind of service experiences?
Consumers used Agent-assisted channels more often than Self-service in their most recent interactions by more than 2:1

- 68% of all contacts were Agent-assisted
  - 61% customers that used an Agent-assisted method, did not use any Self-service channel in last 3 months

- 32% of all contacts were Self-service
  - 83% customers that used Self-service channels, also used Agent-assisted channels, separately, in last 3 months

QS4. In which of the following ways did you communicate or interact during this experience? (Respondents were allowed to check multiple methods for up to two experiences.

Chart Base: 2,407
qs4selected_1- qs4selected_11: Total Base - 4673 points of contact (by 2407 respondents), Agent Assisted Channels- 3171 (68%) and Self Service Channels- 1502 (32%)
Phone is the most utilized channel, followed by Agent-assisted digital channels email and chat

Visiting the company website is the most utilized Self-service channel

Only 8% of respondents used automated or virtual assistants for their most recent service interaction

Methods of Communication During Most Recent Experience
(% of Experiences in which each method was mentioned)

- You called the company and spoke to a live representative: 49%
- You emailed the company: 32%
- You chatted online with a live representative: 28%
- You visited the company’s website to seek answers to a question/need: 24%
- You called the company and used an automated menu (“Press or say 1 for…”) for the entire call: 16%
- You used the company’s mobile app: 15%
- You text messaged with the company on your mobile device: 10%
- You started a conversation with a company by posting a question or comment on social media: 9%
- You used an automated or virtual assistant online or on your mobile phone: 7%
- You had a video chat with the company: 4%
- You used a home electronic ‘virtual assistant’ device: 1%

QS4. In which of the following ways did you communicate or interact during this experience? (Respondents were allowed to check multiple methods for up to two experiences. Chart Base: 2,407 qpselcted_1- qpselcted_11; Total Base - 4673 points of contact by 2407 respondents), Agent Assisted Channels= 3171 (68%) and Self Service Channels= 1502 (32%)
During their most recent experience, more than half of customers used Agent-assisted methods to resolve a problem or issue.

Self-service is more often utilized for general information or purchase related inquiries.

22% or over 1 in 5 interactions were regarding a purchase.

Purpose of the Experience when Communicating or Interacting with a Company
(\% mentioning each category, multiple responses allowed)

- It was about information I was looking for, or a question I was trying to get answered (but not a problem):
  - Total: 35
  - Agent-assisted: 31
  - Self-service: 40

- There was a problem or issue I was trying to get resolved:
  - Total: 47
  - Agent-assisted: 54
  - Self-service: 40

- It was related to a purchase I made or was planning on making:
  - Total: 22
  - Agent-assisted: 18
  - Self-service: 26

- Some other reason:
  - Total: 7
  - Agent-assisted: 5
  - Self-service: 8

QEC1: Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), which of the following best describes the purpose?
(Multiple responses were allowed)
Base: Total Respondents, n=2407
About half of all respondents have used Artificial Intelligence (AI) technology for any purpose

Online chatbots or ‘virtual’ assistants are the most commonly used followed by an automated assistant on a mobile phone, for any purpose

When asked about their most recent service interaction, note that only 8% of respondents used automated or virtual assistants (see page 8 for details)

Use of Artificial Intelligence (AI) for Any Purpose (% of Experiences in which each method was mentioned)

- You used an automated or ‘virtual’ assistant online (e.g. chatbot, automated assistant, avatar, etc.) 23
- You used an automated or ‘virtual’ assistant on your mobile phone (for example, spoke or texted with an automated assistant, chatbot, avatar, etc.) 17
- You used a home electronic ‘virtual assistant’ device (for example, Amazon Alexa, Echo or Google Home) 13
- None of the above 53
- Don’t know 5

QAIX1_1-6. Have you ever used any of the following “automated” or “artificial intelligence” technologies? n=2407
Customer Experience
What is the overall experience for consumers’ most recent service interactions?
Only 35% of consumers are highly satisfied with their most recent experience

Satisfaction with Agent-assisted and Self-service channels are about equal at 35% and 36% respectively.

Chat has the highest satisfaction of all channels at 47% being highly satisfied; mobile apps and website round out the top 3.

Consumer satisfaction with automated assistants is very low, at only 27%

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**Satisfaction with Using each Method of Communication**

(\% Rating as 9/10 and Mean Scores)

**Overall Satisfaction: 35\%**

<table>
<thead>
<tr>
<th>Method of Communication</th>
<th>Agent-assisted Channels (Aggregate)</th>
<th>Self-service Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent-assisted Channels</td>
<td>35</td>
<td>36</td>
</tr>
<tr>
<td>Online Chat / Video Chat</td>
<td>47</td>
<td>44</td>
</tr>
<tr>
<td>Phone</td>
<td>37</td>
<td>41</td>
</tr>
<tr>
<td>Text</td>
<td>35</td>
<td>31</td>
</tr>
<tr>
<td>Email</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>Social Media</td>
<td>26</td>
<td>26</td>
</tr>
</tbody>
</table>

*Caution: low sample size*

Q01. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?*

Unweighted Bases: Agent-assisted (1289), Online Chat (318), Social (138), Phone (341), Email (334), text (148), Video chat (10); Self-service (1118), Automated Assistant on (154), Automated Phone Menu (811), Company’s Mobile App (307), Company’s Website (314), Home Electronic Assist (32)
Chat and phone are each viewed as convenient and quick, requiring a minimal amount of effort.

### Channels viewed as “a convenient way to resolve my question or issue”

<table>
<thead>
<tr>
<th>Top three “most convenient”</th>
<th>Bottom three “least convenient”</th>
</tr>
</thead>
<tbody>
<tr>
<td>· Chat</td>
<td>· Automated Phone Menu</td>
</tr>
<tr>
<td>· Website</td>
<td>· Text</td>
</tr>
<tr>
<td>· Phone</td>
<td>· Email</td>
</tr>
</tbody>
</table>

### Channels viewed as “resolving my question or issue in the quickest way possible”

<table>
<thead>
<tr>
<th>Top three “quickest”</th>
<th>Bottom three “least quick”</th>
</tr>
</thead>
<tbody>
<tr>
<td>· Chat</td>
<td>· Automated Phone Menu</td>
</tr>
<tr>
<td>· Phone</td>
<td>· Text</td>
</tr>
<tr>
<td>· Website (tied)</td>
<td>· Email</td>
</tr>
<tr>
<td>· Mobile (tied)</td>
<td></td>
</tr>
</tbody>
</table>

### Channels viewed as “requiring a minimal amount of effort to resolve the issue/need”

<table>
<thead>
<tr>
<th>Top three “minimal effort”</th>
<th>Bottom three “minimal effort”</th>
</tr>
</thead>
<tbody>
<tr>
<td>· Chat</td>
<td>· Automated Phone Menu</td>
</tr>
<tr>
<td>· Phone</td>
<td>· Email</td>
</tr>
<tr>
<td>· Website</td>
<td>· Social Media</td>
</tr>
</tbody>
</table>

QCH3_1: For these next few questions, think about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL). Please rate this method of communication on each of the characteristics below. Scale: Excellent, Very Good, Good, Fair, Poor. Gray shading indicates question was not asked for those quota cells. Base: Total Respondents, n=2407.
Channel Preference

What channels are most and least preferred?
Consumers prefer Agent-assisted over Self-service channels, 66% to 33%

Phone, email and chat are the top 3 most preferred channels. Website is the 4th most preferred channel.

Preferred Channel Totals

<table>
<thead>
<tr>
<th>Channel Preference</th>
<th>Agent-assisted: 66%</th>
<th>Self-service: 33%</th>
</tr>
</thead>
<tbody>
<tr>
<td>You call the company (live rep)</td>
<td>63</td>
<td>30</td>
</tr>
<tr>
<td>You email the company</td>
<td>53</td>
<td>13</td>
</tr>
<tr>
<td>You chat online (live rep)</td>
<td>54</td>
<td>18</td>
</tr>
<tr>
<td>You visit the company’s website</td>
<td>50</td>
<td>17</td>
</tr>
<tr>
<td>You use the company’s mobile app</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>You call the company and use an automated menu</td>
<td>20</td>
<td>5</td>
</tr>
<tr>
<td>You text message with the company</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>You start a conversation with a company by posting a question on social media</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>You use an “automated” or “virtual assistant”</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>You use video chat</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>You use a home electronic “virtual assistant” device</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

QCP1. Of the ways in which you can interact with a company during a customer service experience, please rank your top three from the list below. Base: Total Respondents, n=2407.
90% of consumers prefer to interact with a live customer service agent instead of a chatbot or ‘virtual assistant’

Consumers do not believe that chatbots and virtual assistants make it easier to get issues resolved.

Consumers agree that chatbots need to get smarter.

Consumers want to know if they are interacting with a chatbot.

### Consumer Attitudes with Virtual Assistants (% Mentioning each Rating)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chatbot and virtual assistants need to get smarter before I am willing to use them regularly</td>
<td>79</td>
<td>34</td>
<td>45</td>
</tr>
<tr>
<td>I prefer to interact with a live customer service agent instead of a chatbot or ‘virtual assistant’</td>
<td>90</td>
<td>62</td>
<td>28</td>
</tr>
<tr>
<td>I want to be informed immediately if I am interacting with a chatbot / virtual assistant rather than a live agent</td>
<td>91</td>
<td>59</td>
<td>32</td>
</tr>
<tr>
<td>Chatbot and virtual assistants make it easier to get issues resolved</td>
<td>34</td>
<td>6</td>
<td>28</td>
</tr>
<tr>
<td>I would like to use my ‘virtual assistant’ to interact with businesses (i.e. Google Home, Amazon ECHO / Alexa, etc.)</td>
<td>30</td>
<td>7</td>
<td>23</td>
</tr>
</tbody>
</table>

QA2X1X6_1-5. For each of the statements below, indicate how strongly you agree or disagree.
Base: Total Respondents, n=2407
Customer (CX) Experience Attitudes

What perceptions and expectations do customers have for omnichannel service?
Customers’ want true omnichannel service, and are willing switch companies that provide poor service

- **94%**: I expect companies to direct me to the method of contacting them that resolves my situation in the quickest way.
- **91%**: I expect companies to provide a seamless experience for me when moving from one communication method to another such as from phone to text or chat to phone.
- **87%**: I am more willing to do business with a company that offers me more ways to communicate with them.
- **83%**: I expect companies to be more proactive by reaching out to me to provide better service with reminders, service notifications or confirmations.
- **81%**: If I’ve had a bad customer service experience, I am very likely to switch to another company in the future.

QCA_01 - 10. For each of the statements below, indicate how strongly you agree or disagree.

Base: Total Respondents, n=2407

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The vast majority of consumers will reward companies who deliver exceptional customer service

89% are willing to buy more products and services from that company

83% are willing to recommend that company to others on social media or if asked by family

82% are willing to go out of their way to buy products or services from that company

Customer (CX) Experience Attitudes

QCE3_1 - 5. If a company provides an exceptional customer experience that is the very best in their product or service category, please indicate how much you agree or disagree with each of the following statements: Base: Total Respondents, n=2407

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Overall Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am willing to recommend that company to others on social media or if asked by family</td>
<td>83</td>
<td>37</td>
<td>46</td>
</tr>
<tr>
<td>I am willing to buy more products and services from that company</td>
<td>89</td>
<td>34</td>
<td>55</td>
</tr>
<tr>
<td>I am willing to go out of my way to buy products or services from that company</td>
<td>82</td>
<td>25</td>
<td>57</td>
</tr>
<tr>
<td>I am willing to share my experiences with that company on social media</td>
<td>63</td>
<td>22</td>
<td>41</td>
</tr>
<tr>
<td>I am willing to pay more for that product or service</td>
<td>58</td>
<td>13</td>
<td>45</td>
</tr>
</tbody>
</table>
Channel Influence on Net Promoter Score®
Company’s mobile app, chat and company’s website most strongly drive Net Promoter Score®

Mobile app, chat and website channels lead to a higher likelihood of recommending a company or continuing to do business with that company.

Overall Agent-assisted and Self-service channels are about equal in their impact on NPS®, at 4 and 3 respectively.

Automated phone service NPS® is poor.

Net Promoter Score®

Agent-assisted 4
Self-service 3
Company’s Mobile App 25
Online Chat/Video Chat 21
Company’s Website 14
Phone 7
Text -2
Automated Assistant on Mobile Phone -8
Email -9
Social Media -10
Automated Phone Menu -26

QCH1x3. Based on the result of your experience in the (INDUSTRY) industry when (CHANNEL), how likely would you be to recommend that company to others, if asked by family, friends or colleagues?
Methodology:
2,407 online surveys using a consumer panel. Data was collected March and April 2018

Survey Length:
Approximately 9 min

Qualification Criteria:
Consumers who had a customer service experience within the past three months either by initiating contact with a company, or being contacted by a company

Weighting:
Data were weighted so that those entering the survey—prior to screening—aligned with US, UK and AU Census proportions for age, gender, race, and ethnicity

Targeted Quotas: Surveys were completed across the following Agent-assisted (AA) and Self-service (SS) channels with final responses as follows:

<table>
<thead>
<tr>
<th>Channels</th>
<th>UK</th>
<th>US</th>
<th>AU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone (AA)</td>
<td>112</td>
<td>115</td>
<td>114</td>
</tr>
<tr>
<td>Email (AA)</td>
<td>111</td>
<td>113</td>
<td>110</td>
</tr>
<tr>
<td>Online Chat (AA)</td>
<td>110</td>
<td>100</td>
<td>108</td>
</tr>
<tr>
<td>Text (AA)</td>
<td>52</td>
<td>50</td>
<td>46</td>
</tr>
<tr>
<td>Social Media (AA)</td>
<td>50</td>
<td>42</td>
<td>46</td>
</tr>
<tr>
<td>Video Chat (AA)</td>
<td>NA</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Automated Phone Menu (SS)</td>
<td>102</td>
<td>105</td>
<td>104</td>
</tr>
<tr>
<td>Company’s Website (SS)</td>
<td>102</td>
<td>105</td>
<td>107</td>
</tr>
<tr>
<td>Company’s Mobile App (SS)</td>
<td>101</td>
<td>102</td>
<td>104</td>
</tr>
<tr>
<td>Automated Assistant on Your Mobile Phone (SS)</td>
<td>49</td>
<td>52</td>
<td>53</td>
</tr>
<tr>
<td>Home Electronic Assistant (SS)</td>
<td>13</td>
<td>12</td>
<td>7</td>
</tr>
</tbody>
</table>
Demographics

Survey Respondents by Age

Channel Use of Survey Respondents by Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Agent-assisted</th>
<th>Self-service</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Phone</td>
<td>Email</td>
</tr>
<tr>
<td>Total</td>
<td>341</td>
<td>334</td>
</tr>
<tr>
<td>18-24</td>
<td>7%</td>
<td>18%</td>
</tr>
<tr>
<td>25-34</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>35-44</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>45-54</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>55-64</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>24%</td>
<td>23%</td>
</tr>
</tbody>
</table>

QDS1: Age
QDS2: Gender
Base: Total Respondents, US= 802, UK=802 and AU=803
2018 CX Transformation Benchmark

Australia Consumers
2018 Research

NICE inContact
Australia Major Findings

- Consumers in Australia call a company to speak with a live rep more often than any other method for customer service.
- Australian consumers utilized a company’s website more than consumers in other countries. However, satisfaction with using the website for self service was lower than either the US or UK.
- Consumers are most satisfied with chat, phone, and company website. Satisfaction with phone is lower in Australia than in the US and UK.
- For all Self-service channels, satisfaction was lower in Australia than in either the US or UK.
- Calling the company, email, and online chat are the most preferred channels of communication overall.
- Only 3 channels have a positive Net Promoter Score® in Australia: chat, company website, and mobile app.

- Net Promoter Score® scores varied by country with significant differences:
  
  **Australia**  
  Agent-assisted -1 vs Self-service -9

  **UK**  
  Agent-assisted -1 vs Self-service -4

  **US**  
  Agent-assisted 12 vs Self-service 23  
  (up from 3 and -2 respectively in 2017)
Consumers in Australia call a company to speak with a live rep more often than any other method for customer service

Phone, email and chat – all Agent-assisted – are the top 3 most utilized

Visiting the company website is the most utilized Self-service channel—and tied very closely to online chat

<table>
<thead>
<tr>
<th>Methods of Communication During Most Recent Experience</th>
<th>% of Experiences in which each method was mentioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>You called the company and spoke to a live representative</td>
<td>49</td>
</tr>
<tr>
<td>You emailed the company</td>
<td>31</td>
</tr>
<tr>
<td>You chatted online with a live representative</td>
<td>26</td>
</tr>
<tr>
<td>You visited the company’s website to seek answers to a question/need</td>
<td>25</td>
</tr>
<tr>
<td>You called the company and used an automated menu (“Press or say 1 for…”) for the entire call</td>
<td>15</td>
</tr>
<tr>
<td>You used the company's mobile app</td>
<td>15</td>
</tr>
<tr>
<td>You text messaged with the company on your mobile device</td>
<td>9</td>
</tr>
<tr>
<td>You started a conversation with a company by posting a question or comment on social media</td>
<td>8</td>
</tr>
<tr>
<td>You used an automated or virtual assistant online or on your mobile phone</td>
<td>7</td>
</tr>
<tr>
<td>You had a video chat with the company</td>
<td>2</td>
</tr>
<tr>
<td>You used a home electronic ‘virtual assistant’ device</td>
<td>1</td>
</tr>
</tbody>
</table>

qs4. In which of the following ways did you communicate or interact during this experience? (Respondents were allowed to check multiple methods for up to two experiences. Chart Base: 803
qs4selected_1 - qs4selected_11: Total Base – 1,522 points of contact (by 803 respondents), Agent Assisted Channels= 1006 (66%) and Self Service Channels= 516 (32%)
Online chat scores highest satisfaction among all communication channels and customers are more satisfied with communication through Agent-assisted channels.

Satisfaction with phone is lower in Australia than in the US and UK.

In Self-service channels, customers are more satisfied using company’s website or mobile app compared to other methods.

Automated phone menu performed worst among all channels.

<table>
<thead>
<tr>
<th>Agent-assisted Channels</th>
<th>Self-service Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agent-assisted Channels (Aggregate)</strong></td>
<td><strong>Self-service (Aggregate)</strong></td>
</tr>
<tr>
<td>Online Chat</td>
<td>44</td>
</tr>
<tr>
<td>Text</td>
<td>35</td>
</tr>
<tr>
<td>Phone</td>
<td>37</td>
</tr>
<tr>
<td>Email</td>
<td>28</td>
</tr>
<tr>
<td>Social Media</td>
<td>26</td>
</tr>
</tbody>
</table>

**QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?**

Unweighted Bases: Agent-assisted (428), Online Chat (108), Social (46), Phone (114), Email (110), Text (46); Self-service (375) Automated Assistant on your mobile phone (53), Automated Phone Menu (104), Company’s Mobile App (104), Company’s Website (107), Home Electronic Assist (7)
Satisfied consumers used words such as quickly, easy, friendly, informative. For improvement, they suggested the need to talk to a person as well as eliminating the wait.
Top preferred channels of communication are speaking to a live representative via phone, emailing the company and online chat

Company website is the 4th most often preferred channels

Outside of top 4, no other channel was preferred by more than 20% of consumers

**Preferred Channel Totals**

<table>
<thead>
<tr>
<th>Channel Preference</th>
<th>Agent-assisted: 68%</th>
<th>Self-service: 32%</th>
</tr>
</thead>
<tbody>
<tr>
<td>You call the company (live rep)</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>You email the company</td>
<td>58</td>
<td></td>
</tr>
<tr>
<td>You chat online (live rep)</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td>You visit the company’s website</td>
<td>51</td>
<td></td>
</tr>
<tr>
<td>You use the company’s mobile app</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>You call the company and use an automated menu</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>You text message with the company</td>
<td>11</td>
<td></td>
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<td>You use an “automated” or “virtual assistant”</td>
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<td></td>
</tr>
<tr>
<td>You have a video chat</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>You use a home electronic “virtual assistant” device</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

QCP1. Of the ways in which you can interact with a company during a customer service experience, please rank your top three from the list below.

Base: Total Respondents, n=803
Customers’ want true omnichannel service; their strongest expectations are to be directed to the fastest channels and to have a seamless experience across channels.

- **95%**
  I expect companies to **direct me to the method** of contacting them that resolves my situation in the quickest way.

- **93%**
  I expect companies to **provide a seamless experience** for me when moving from one communication method to another such as from phone to text or chat to phone.

- **88%**
  I am **more willing to do business** with a company that offers me **more ways to communicate** with them.

- **84%**
  I expect companies to **be more proactive** by reaching out to me to provide better service with reminders, service notifications or confirmations.

- **81%**
  If I’ve had a bad customer service experience, I am **very likely to switch to another company** in the future.

QCA_01 - 10. For each of the statements below, indicate how strongly you agree or disagree. Base: Total Respondents, n=803.
Only 3 channels have a positive Net Promoter Score® in Australia: chat, mobile app and company website

Lowest NPS® are for automated phone menu and social media

QCH1x3. Based on the result of your experience in the [INDUSTRY] industry when [CHANNEL], how likely would you be to recommend that company to others, if asked by family, friends or colleagues?
2018 CX Transformation Benchmark
United States Consumers
2018 Research

Including comparison with
2017 Customer Experience Transformation Benchmark
US Major Findings – 2018 vs 2017

- In 2018, US consumers are still using phone most often, however phone declined to 53% from 66% of interactions while email doubled and chat tripled (since 2017).
- Self-service channel use as a whole in the US almost doubled, from 17 to 31%. Website use grew by two-thirds while mobile app use surged 5X, from three to 15%.
- Customers are more satisfied using phone and company’s website compared to 2017. Automated phone menu improved in 2018 but still performed worst among all channels.
- Customer satisfaction with Agent-assisted channels overall is unchanged from 2017, Self-service satisfaction is up.
- Online chat scores highest satisfaction among all communication channels.
- Calling the company, chat and company website are the most preferred channels of communication overall. Preference for chat increased from 39% in 2017 to 53% in 2018.
- Net Promoter Score® is up significantly in 2018 for Agent-assisted and Self-service channels.
  - Agent-assisted improved by 9 points; Self-service improved by 25 points
  - Automated phone menu and email each improved (+19 and +9 points) but email still has a negative NPS® score

- Net Promoter Score® scores varied by country with significant differences:

**US**
Agent-assisted 12 vs Self-service 23
(up from 3 and -2 respectively in 2017)

**UK**
Agent-assisted -1 vs Self-service -4

**Australia**
Agent-assisted -1 vs Self-service -9
In 2018, US consumers are still using phone most often, however phone declined to 53% of interactions while email doubled and chat tripled.

Self-service use almost doubled from 17% in 2017 to 31% overall in 2018 including large increases in visiting company’s website, using automated phone menu and a company’s mobile app.

Methods of Communication During Most Recent Experience
(% of Experiences in which each method was mentioned)

- You called the company and spoke to a live representative: 66% in 2017, 53% in 2018
- You emailed the company: 15% in 2017, 30% in 2018
- You chatted online with a live representative: 10% in 2017, 30% in 2018
- You visited the company’s website to seek answers to a question/need: 13% in 2017, 22% in 2018
- You called the company and used an automated menu (“Press or say ‘1 for...’”) for the entire call: 4% in 2017, 17% in 2018
- You used the company’s mobile app: 3% in 2017, 15% in 2018
- You text messaged with the company on your mobile device: 1% in 2017, 10% in 2018
- You started a conversation with a company by posting a question or comment on social media: 10% in 2017, 9% in 2018
- You used an automated or virtual assistant online or on your mobile phone: 1% in 2017, 7% in 2018
- You had a video chat with the company: 1% in 2017, 6% in 2018
- You used a home electronic ‘virtual assistant’ device: 0.4% in 2017, 1% in 2018

In 2018, US consumers 1,611 points of contact. 69% of all contacts were Agent-assisted. 31% of all contacts were Self-service.
In 2018, satisfaction with Agent-assisted channels overall is unchanged from 2017, Self-service is up

Customers are more satisfied using phone and company’s website compared to last year

Automated phone menu improved in 2018 but still performed worst among all channels

### Satisfaction with Using each Method of Communication (% Rating as 9/10)

**Agent-assisted Channels**

- **Agent-assisted Channels (Aggregate)**: 45 (2018), 46 (2017)
- **Online Chat / Video Chat**: 54 (2018), 56 (2017)
- **Phone**: 40 (2018), 48 (2017)
- **Social Media / Text**: 42 (2018), 41 (2017)
- **Email**: 43 (2018), 41 (2017)

**Self-service Channels**

- **Self-service (Aggregate)**: 39 (2018), 45 (2017)
- **Company’s Website**: 38 (2018), 47 (2017)
- **Mobile App/Home Electronic Assist/Virtual Assistant**: 49 (2018), 47 (2017)
- **Automated Phone Menu**: 28 (2018), 40 (2017)
Customers satisfied with their service experience say the channel is easy, quick, fast, simple.

Why Communication Methods are Good
(Rated method as 9-10)

What Needs to Be Improved
(Rated method as 1-8)

QCH2_1. And what was particularly good about that method of communication that led you to give that rating? Base: Rated Communication method as 9-10, n=285
QCH2_2. And what about that method of communication could be improved so that next time you would be more satisfied? Base: Rated communication method as 1-8, n=435
Calling the company to speak with a live rep is the most preferred channel followed by chat, website and email.

### Preferred Channel Totals

<table>
<thead>
<tr>
<th>Channel Preference</th>
<th>Agent-assisted (%)</th>
<th>Self-service (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>You call the company (live rep)</td>
<td>65</td>
<td>32</td>
</tr>
<tr>
<td>You chat online (live rep)</td>
<td>53</td>
<td>17</td>
</tr>
<tr>
<td>You visit the company’s website</td>
<td>50</td>
<td>17</td>
</tr>
<tr>
<td>You email the company</td>
<td>43</td>
<td>10</td>
</tr>
<tr>
<td>You call the company and use an automated menu</td>
<td>26</td>
<td>7</td>
</tr>
<tr>
<td>You used the company’s mobile app</td>
<td>22</td>
<td>7</td>
</tr>
<tr>
<td>You text message with the company</td>
<td>12</td>
<td>2</td>
</tr>
<tr>
<td>You start a conversation with a company by posting a question on social media</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>You use an “automated” or “virtual assistant”</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>You have a video chat</td>
<td>6</td>
<td>12</td>
</tr>
<tr>
<td>You use a home electronic “virtual assistant” device</td>
<td>4</td>
<td>11</td>
</tr>
</tbody>
</table>

QCP1. Of the ways in which you can interact with a company during a customer service experience, please rank your top three from the list below.

Base: Total Respondents, n=802
Preference for chat and other digital channels increased in 2018 while phone is down since 2017

Preference for phone is down slightly, but still the most preferred channel

Chat increased to 53% preferred (vs 39% in 2017)

Preference for company’s mobile app and text message both increased in 2018

Change in Channel Preference: 2018 vs 2017 (% Ranked as 1st, 2nd, 3rd)

<table>
<thead>
<tr>
<th>Preferred Channel Totals</th>
<th>Agent-assisted: 64%</th>
<th>Self-service: 35%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Preference</td>
<td>% Ranked in Top 3 2018</td>
<td>% Ranked in Top 3 2017</td>
</tr>
<tr>
<td>You call the company (live rep)</td>
<td>65</td>
<td>67</td>
</tr>
<tr>
<td>You chat online (live rep)</td>
<td>53</td>
<td>39</td>
</tr>
<tr>
<td>You visit the company’s website</td>
<td>50</td>
<td>49</td>
</tr>
<tr>
<td>You email the company</td>
<td>43</td>
<td>44</td>
</tr>
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<td>4</td>
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</table>
Customers’ want true omnichannel service; their strongest expectations are to be directed to the fastest channels and to have a seamless experience across channels.

- **95%**
  I expect companies to **direct me to the method of contacting them that resolves my situation in the quickest way**.

- **91%**
  I expect companies to **provide a seamless experience** for me when moving from one communication method to another such as from phone to text or chat to phone.

- **89%**
  I am **more willing to do business** with a company that offers me **more ways to communicate** with them.

- **83%**
  I expect companies to **be more proactive** by reaching out to me to provide better service with reminders, service notifications or confirmations.

- **78%**
  If I’ve had a bad customer service experience, I am **very likely to switch to another company** in the future.

---

QCA_01 - 10. For each of the statements below, indicate how strongly you agree or disagree.
Base: Total Respondents, n=802
Net Promoter Score® is up significantly in 2018 for Agent-assisted and Self-service channels in the US

Agent-assisted improved by 9 points; Self-service improved by 25 points

Automated phone menu and email each improved (+19 and +9 points) but email still has a negative NPS® score

2018 Self-service channels lead Net Promoter Score® compared to Agent-assisted, with almost double NPS®

Company’s mobile app, online/video chat and company’s website interactions have notable NPS® of 38, 28 and 25, respectively

NOTE: not all channels available for year-over-year comparison (i.e., mobile app, social media, text)

<table>
<thead>
<tr>
<th>Channel</th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent-assisted</td>
<td>12</td>
<td>3</td>
</tr>
<tr>
<td>Self-service</td>
<td>23</td>
<td>-2</td>
</tr>
<tr>
<td>Company’s Mobile App</td>
<td>38</td>
<td>n/a</td>
</tr>
<tr>
<td>Online Chat/Video Chat</td>
<td>28</td>
<td>19</td>
</tr>
<tr>
<td>Company’s Website</td>
<td>25</td>
<td>11</td>
</tr>
<tr>
<td>Phone</td>
<td>19</td>
<td>1</td>
</tr>
<tr>
<td>Text</td>
<td>14</td>
<td>n/a</td>
</tr>
<tr>
<td>Automated Assistant on Mobile Phone</td>
<td>9</td>
<td>n/a</td>
</tr>
<tr>
<td>Automated Phone Menu</td>
<td>4</td>
<td>-15</td>
</tr>
<tr>
<td>Email</td>
<td>-2</td>
<td>-11</td>
</tr>
<tr>
<td>Social Media</td>
<td>-2</td>
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</tr>
</tbody>
</table>

QCH1x3. Based on the result of your experience in the [INDUSTRY] industry when [CHANNEL], how likely would you be to recommend that company to others, if asked by family, friends or colleagues?
United Kingdom Major Findings

- Consumers in the UK call a company to speak with a live rep more often than any other method for customer service.
- UK consumers rely more on email than other countries.
- Customers are more satisfied with communication through Agent-assisted channels.
- Online chat scores highest satisfaction among all communication channels.
- Calling the company, email and online chat are the most preferred channels of communication overall.
- Only a few channels have a positive NPS® with range from -43 to +25.
- Company’s mobile app and online chat received the highest NPS® scores, 25 and 16.
  - Automated phone menu, email and social media received the lowest

- Net Promoter Score® scores varied by country with significant differences:
  
  **UK**
  Agent-assisted -1 vs Self-service -4

  **Australia**
  Agent-assisted -1 vs Self-service -9

  **US**
  Agent-assisted 12 vs Self-service 23
  (up from 3 and -2 respectively in 2017)
Consumers in the UK call a company to speak with a live rep more often than any other method for customer service.

Phone, email and chat – all Agent-assisted – are the top 3 most utilized.

Visiting the company website is the most utilized Self-service channel.

Methods of Communication During Most Recent Experience

(\% of Experiences in which each method was mentioned)

- You called the company and spoke to a live representative: 44\%
- You emailed the company: 35\%
- You chatted online with a live representative: 28\%
- You visited the company’s website to seek answers to a question/need: 23\%
- You called the company and used an automated menu (“Press or say 1 for...”) for the entire call: 15\%
- You used the company’s mobile app: 15\%
- You text messaged with the company on your mobile device: 10\%
- You started a conversation with a company by posting a question or comment on social media: 10\%
- You used an automated or virtual assistant online or on your mobile phone: 7\%
- You had a video chat with the company: 3\%
- You used a home electronic ‘virtual assistant’ device: 2\%

QS4. In which of the following ways did you communicate or interact during this experience? (Respondents were allowed to check multiple methods for up to two experiences.

Chart Base: 802
qs4selected_1- qs4selected_11: Total Base – 1,540 points of contact (by 802 respondents), Agent Assisted Channels= 1049 (68\%) and Self Service Channels= 491 (32\%)
Online Chat scores highest satisfaction among all communication channels and customers are more satisfied with communication through Agent-assisted channels.

In Self-service channels, customers are more satisfied using company’s mobile app as a method of communication.

Automated phone menu performed worst among all channels.

### Satisfaction with Using each Method of Communication

<table>
<thead>
<tr>
<th>Method of Communication</th>
<th>Agent-assisted Channels (Aggregate)</th>
<th>Self-service Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent-assisted Channels (Aggregate)</td>
<td>39</td>
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</tr>
<tr>
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<td>47</td>
<td>43</td>
</tr>
<tr>
<td>Phone</td>
<td>42</td>
<td>40</td>
</tr>
<tr>
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<td>Social Media</td>
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<td>17</td>
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</table>

QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience? Unweighted Bases: Agent-assisted (435), Online Chat (110), Social (50), Phone (112), Email (111), text (52); Self-service (367), Automated Assistant on your mobile phone (49), Automated Phone Menu (102), Company’s Mobile App (101), Company’s Website (102), Home Electronic Assist (13).
Satisfied consumers appreciated quick, easy service. For improvement, they suggested eliminating the wait, being quicker.
Calling the company, email and online chat are the most preferred channels of communication overall

Company website is the 4th most often preferred channels

Outside of top 4, no other channel was preferred by more than 25% of consumers

Preferred Channel Totals

Agent-assisted: 66%  
Self-service: 33%

Channel Preference (% Ranked as 1st, 2nd, 3rd)

- You call the company (live rep): 61% 27% 18% 16%
- You email the company: 58% 15% 25% 18%
- You chat online (live rep): 54% 19% 18% 17%
- You visit the company’s website: 50% 17% 14% 19%
- You use the company’s mobile app: 21% 10% 6% 5%
- You call the company and use an automated menu: 17% 3% 7% 7%
- You start a conversation with a company by posting a question on social media: 10% 2% 4% 4%
- You text message with the company: 10% 2% 3% 5%
- You use an “automated” or “virtual assistant”: 8% 2% 2% 4%
- You have a video chat: 5% 1% 2% 2%
- You use a home electronic “virtual assistant” device: 4% 1% 1% 2%

QCP1. Of the ways in which you can interact with a company during a customer service experience, please rank your top three from the list below.
Base: Total Respondents, n=802
Customers’ want true omnichannel service; their strongest expectations are to be directed to the fastest channels and to have a seamless experience across channels.

- **93%**: I expect companies to direct me to the method of contacting them that resolves my situation in the quickest way.
- **89%**: I expect companies to provide a seamless experience for me when moving from one communication method to another such as from phone to text or chat to phone.
- **85%**: If I’ve had a bad customer service experience, I am very likely to switch to another company in the future.
- **84%**: I am more willing to do business with a company that offers me more ways to communicate with them.
- **82%**: I expect companies to be more proactive by reaching out to me to provide better service with reminders, service notifications or confirmations.

QCA_01 - 10. For each of the statements below, indicate how strongly you agree or disagree.

Base: Total Respondents, n=802
Only 4 channels have a positive Net Promoter Score® with range from -43 to +25.

Company’s mobile app and online chat received the highest scores whereas automated phone menu, email and social media received the lowest.

**Net Promoter Score®**

- Agent-assisted: -1
- Self-service: -4
- Company’s Mobile App: 25
- Online Chat: 16
- Phone: 9
- Company’s Website: 9
- Automated Assistant on Mobile Phone: -5
- Text: -11
- Social Media: -14
- Email: -15
- Automated Phone Menu: -43

QCH1x3. Based on the result of your experience in the (INDUSTRY) industry when (CHANNEL), how likely would you be to recommend that company to others, if asked by family, friends or colleagues?
Why NICE inContact?

We are the cloud contact center software leader with the most complete, easiest and most reliable solution to help organizations achieve their customer experience goals. NICE inContact continuously innovates in the cloud and is the only provider to offer a complete solution that includes CXone, an expert service model and the broadest partner ecosystem. For more information, visit www.niceincontact.com

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Faster Service, Happier Customers: Using Self-Service to Accelerate the Speed of Resolution White Paper
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