2018 Customer Experience (CX) Transformation Benchmark

Global Consumers:
United States, United Kingdom, Australia

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Executive Summary

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Overview

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

35% | Only 35% are highly satisfied with their experience

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

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Major Findings (continued)

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)
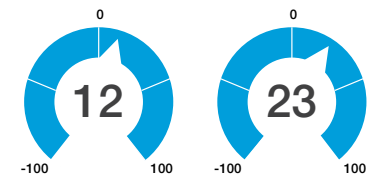
0	0
12	**23**
-100 100	-100 100

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

0	0
-1	**-4**
-100 100	-100 100

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

0	0
-1	**-9**
-100 100	-100 100
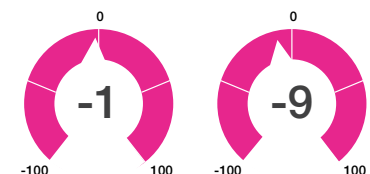
Comparison of Global Findings

Comparison of Global Findings – Channel Usage, Satisfaction, Preference and NPS®

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

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Channel Usage

What channels are consumers using,
and for what kind of service experiences?

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Consumers used Agent-assisted channels more often than Self-service in their most recent interactions by more than 2:1

Total
4,673
points of contact

68%
of all contacts were Agent-assisted

32%
of all contacts were Self-service

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

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%)

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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)

Method	%
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**

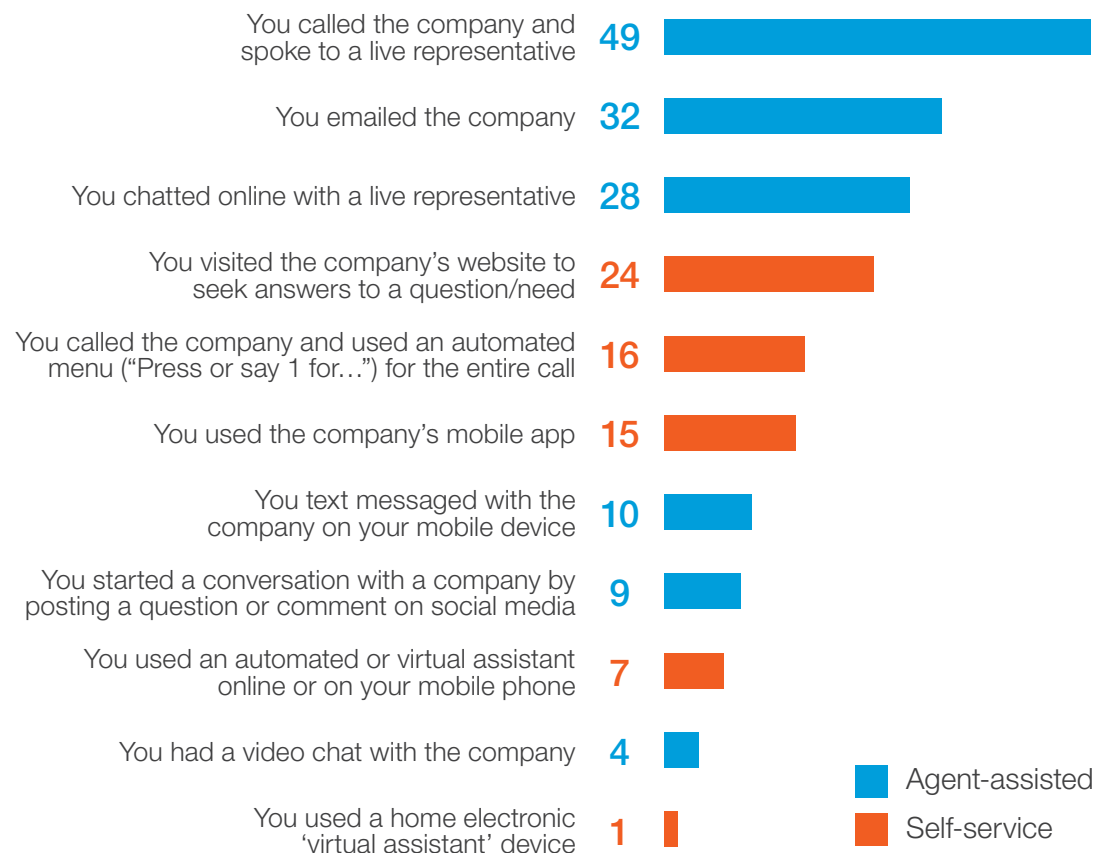Agent-assisted
Self-service

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%)

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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)
- 35
- 31
- 40

There was a problem or issue I was trying to get resolved
- 47
- 54
- 40

It was related to a purchase I made or was planning on making
- 22
- 18
- 26

Some other reason
- 7
- 5
- 8

Legend:
- Total
- Agent-assisted
- Self-service

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

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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?

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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%

Satisfaction with Using each Method of Communication
(% Rating as 9/10 and Mean Scores)

Overall Satisfaction: 35%

Agent-assisted Channels

Channel	%
Agent-assisted Channels (Aggregate)	35
Online Chat / Video Chat	47
Phone	37
Text	35
Email	28
Social Media	26

Self-service Channels

Channel	%
Self-service (Aggregate)	36
Company's Mobile App	44
Company's Website	41
Home Electronic Assistant*	31
Automated Assistant on your mobile phone	27
Automated Phone Menu	26

- Total
- Agent-assisted
- Self-service
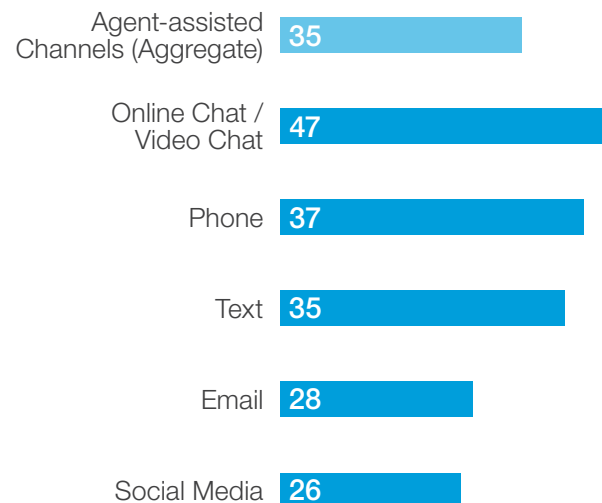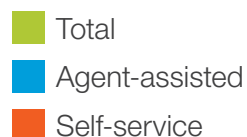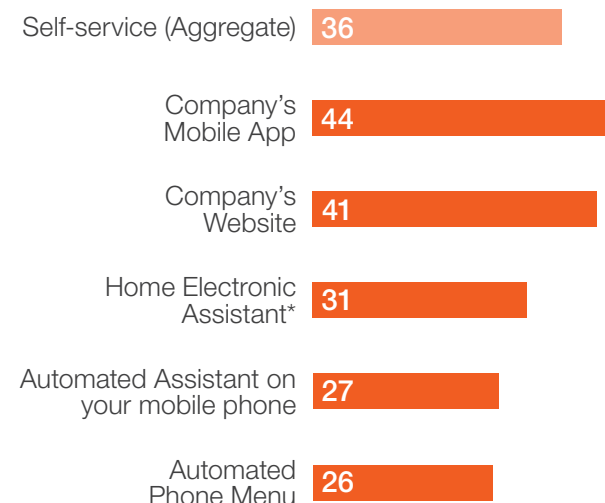
*Caution: low sample size
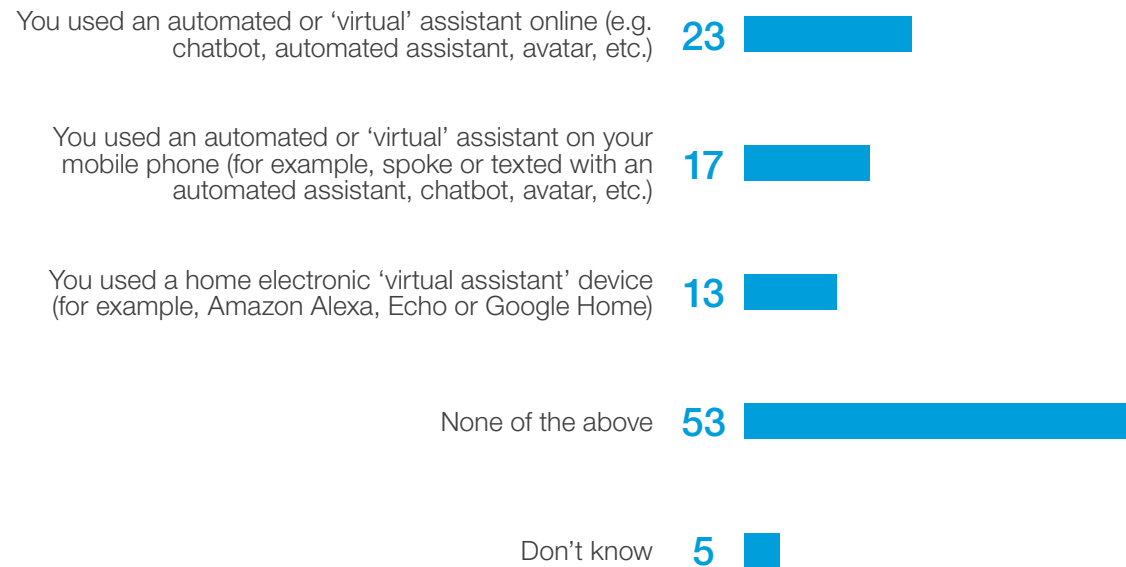QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?
Unweighted Bases: Agent-assisted (1289), Online Chat (318), Social (138), Phone (341), Email (334), text (148), Video chat (10); Self-service (1118), Automated Assistant on (154), Automated Phone Menu (311), Company's Mobile App (307), Company's Website (314), Home Electronic Assist (32)

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Chat and phone are each viewed as convenient and quick, requiring a minimal amount of effort

Automated phone menu and email performed poorly for customer experience

Channels viewed as "a convenient way to resolve my question or issue"

Top three "most convenient"	Bottom three "least convenient"
· Chat · Website · Phone	· Automated Phone Menu · Text · Email

Channels viewed as "resolving my question or issue in the quickest way possible"

Top three "quickest"	Bottom three "least quick"
· Chat · Phone · Website (tied) · Mobile (tied)	· Automated Phone Menu · Text · Email

Channels viewed as "requiring a minimal amount of effort to resolve the issue/need

Top three "minimal effort"	Bottom three "minimal effort"
· Chat · Phone · Website	· Automated Phone Menu · Email · Social Media

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

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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

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

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

You call the company (live rep)	63 — 30 / 18 / 15
You email the company	53 — 13 / 22 / 18
You chat online (live rep)	54 — 18 / 19 / 17
You visit the company's website	50 — 17 / 15 / 18
You use the company's mobile app	20 — 8 / 6 / 6
You call the company and use an automated menu	20 — 5 / 7 / 8
You text message with the company	11 — 2 / 4 / 5
You start a conversation with a company by posting a question on social media	9 — 2 / 3 / 4
You use an "automated" or "virtual assistant"	8 — 2 / 2 / 4
You use video chat	6 — 1 / 2 / 3
You use a home electronic "virtual assistant" device	4 — 1 / 1 / 2

Agent-assisted: 1st, 2nd, 3rd choice
Self-service: 1st, 2nd, 3rd choice

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

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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)

Chatbot and virtual assistants need to get smarter before I am willing to use them regularly
79 | 34 | 45

I prefer to interact with a live customer service agent instead of a chatbot or 'virtual assistant'
90 | 62 | 28

I want to be informed immediately if I am interacting with a chatbot / virtual assistant rather than a live agent
91 | 59 | 32

Chatbot and virtual assistants make it easier to get issues resolved
34 | 6 | 28

I would like to use my 'virtual assistant' to interact with businesses (i.e. Google Home, Amazon ECHO / Alexa, etc.
30 | 7 | 23

■ Strongly Agree
■ Somewhat Agree

QAI2X1X6_1-5. For each of the statements below, indicate how strongly you agree or disagree.
Base: Total Respondents, n=2407

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Customer (CX) Experience Attitudes

What perceptions and expectations do customers have for omnichannel service?

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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

Exceptional Customer Experience
(% Mentioning each Rating)

Statement	%	Strongly Agree	Somewhat Agree
I am willing to recommend that company to others on social media or if asked by family	83	37	46
I am willing to buy more products and services from that company	89	34	55
I am willing to go out of my way to buy products or services from that company	82	25	57
I am willing to share my experiences with that company on social media	63	22	41
I am willing to pay more for that product or service	58	13	45

■ Strongly Agree
■ Somewhat Agree

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

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Channel Influence on
Net Promoter Score®

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Company's mobile app, chat and company's website most strongly drive Net Promoter Score®
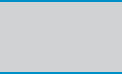
Mobile app, chat and website channels lead to a higher likelihood of recommending a company or continuing to do business with that company

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
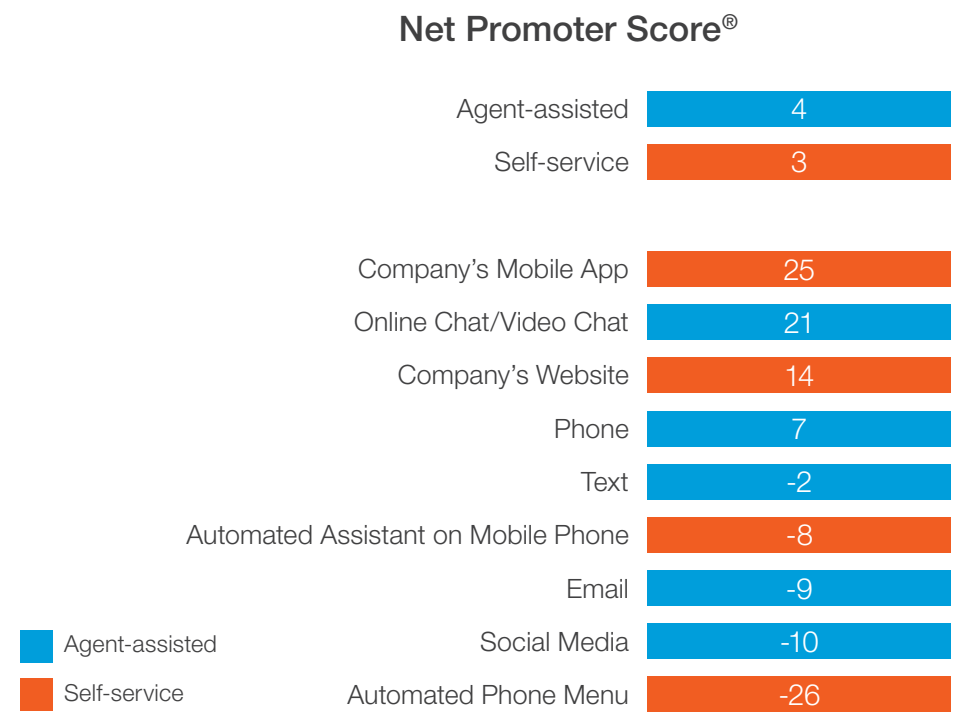
Net Promoter Score®

Channel	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

■ Agent-assisted
■ Self-service

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?

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Methodology
Demographics

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Methodology

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:

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

Demographics

Survey Respondents by Age

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

(Pie chart values: 12%, 18%, 14%, 19%, 19%, 18%)
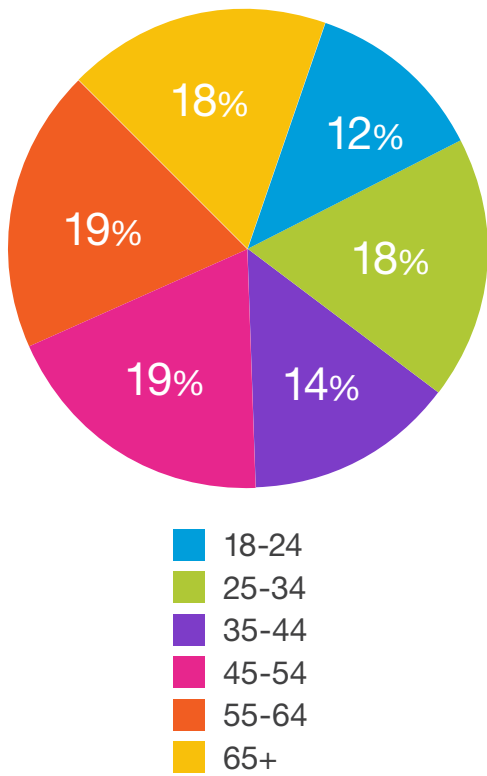
Channel Use of Survey Respondents by Age

	Agent-assisted					Self-service				
	Phone	Email	Online Chat	Text	Social Media	Website	Automated Phone Menu	Mobile App	Automated Assistant on Mobile Phone	Home Electronic Assistant
Total	341	334	318	148	138	314	311	307	154	32
18-24	7%	18%	10%	27%	14%	9%	10%	14%	14%	9%
25-34	18%	14%	20%	20%	26%	11%	13%	18%	25%	50%
35-44	15%	18%	16%	14%	14%	10%	12%	16%	6%	16%
45-54	17%	12%	17%	20%	22%	18%	24%	24%	25%	13%
55-64	19%	16%	18%	13%	16%	25%	24%	19%	17%	9%
65+	24%	23%	19%	7%	7%	27%	18%	9%	13%	3%

QDS1. Age
QDS2. Gender
Base: Total Respondents, US= 802, UK=802 and AU=803

2018 CX Transformation Benchmark

United Kingdom Consumers 2018 Research

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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
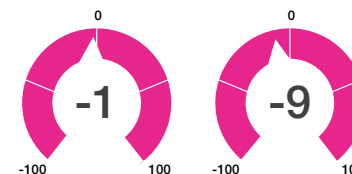
-1 **-4**

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

-1 **-9**

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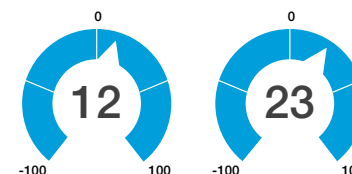
12 **23**
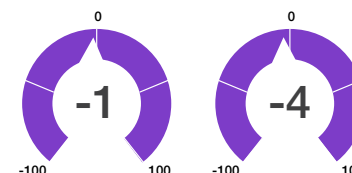
Consumers in the UK call a company to speak with a live rep more often than any other method for customer service

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

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

Total
1,540
points of contact

68%
of all contacts were **Agent-assisted**

32%
of all contacts were **Self-service**

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

■ Agent-assisted
■ Self-service

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%)

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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
(% Rating as 9/10 and Mean Scores)

Agent-assisted Channels

Channel	Score
Agent-assisted Channels (Aggregate)	39
Online Chat	47
Phone	42
Text	36
Email	33
Social Media	26

Self-service Channels

Channel	Score
Self-service (Aggregate)	32
Company's Mobile App	43
Company's Website	40
Home Electronic Assist	38
Automated Assistant on your mobile phone	20
Automated Phone Menu	17
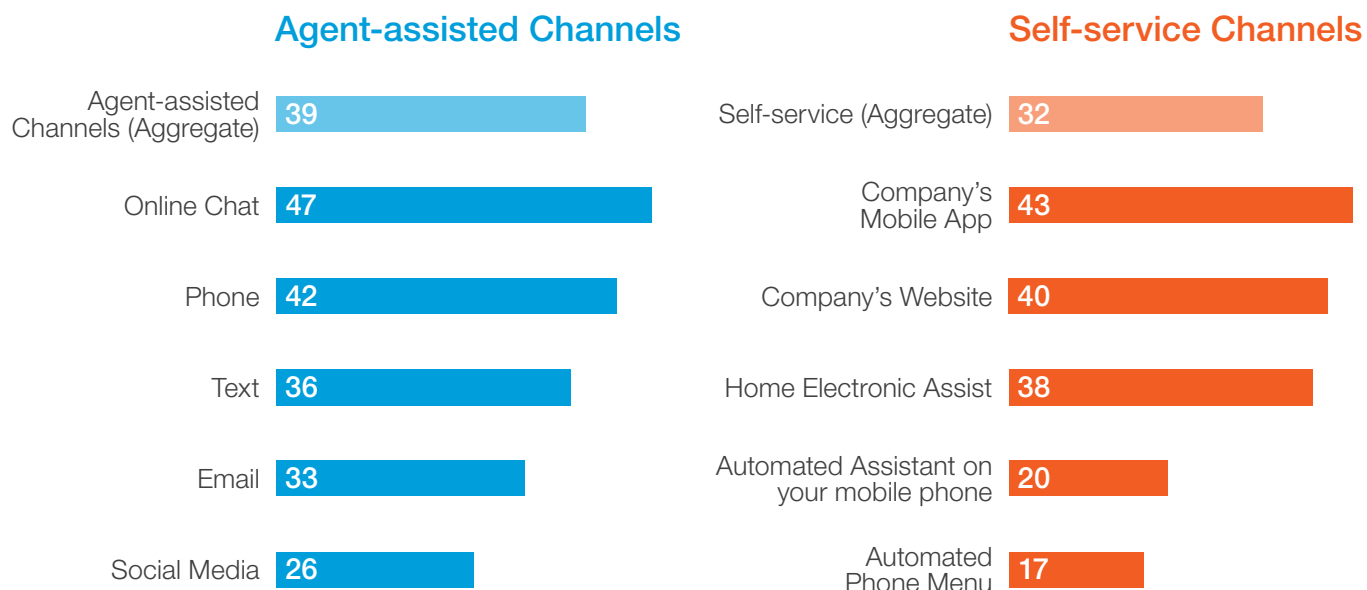
QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience? Unweighted Bases: Agent-assisted (435), Online Chat (110), Social (50), Phone (112), Email (111), text (52); 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)

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Satisfied consumers appreciated quick, easy service. For improvement, they suggested eliminating the wait, being quicker

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=367
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=517

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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)

Channel	Total	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

Agent-assisted: 1st, 2nd, 3rd choice
Self-service: 1st, 2nd, 3rd choice

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

NICE · inContact

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

NICE · inContact

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
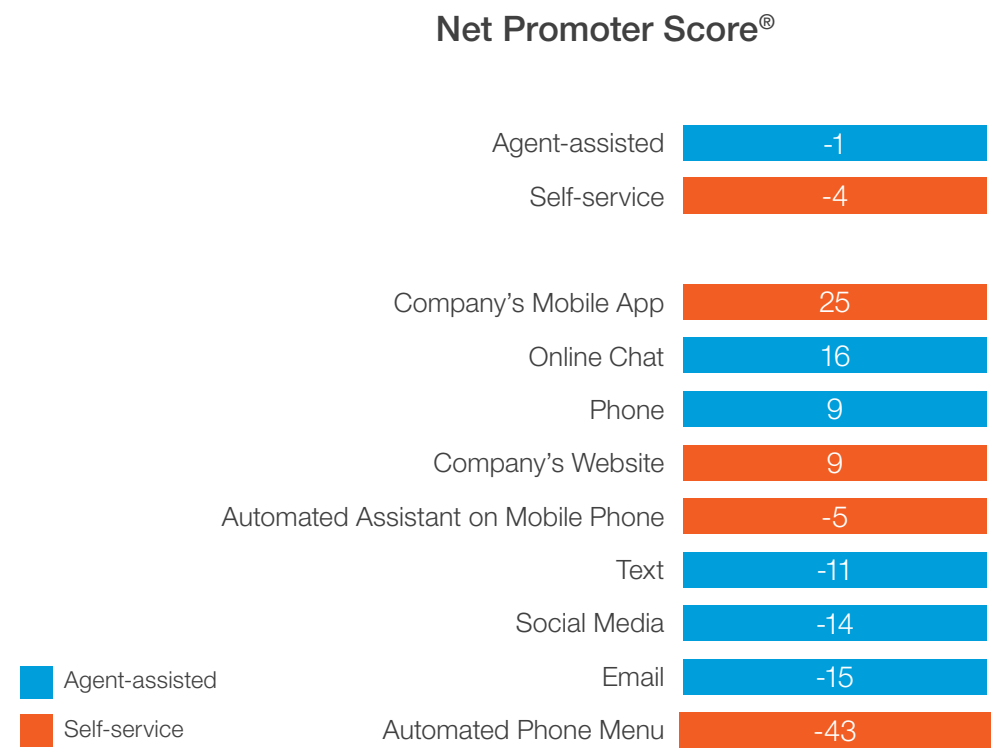
Net Promoter Score®

Channel	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

Legend:
- Agent-assisted
- Self-service

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
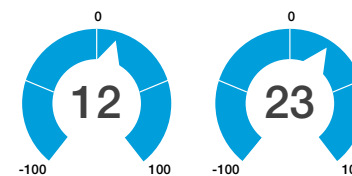
NICE · inContact

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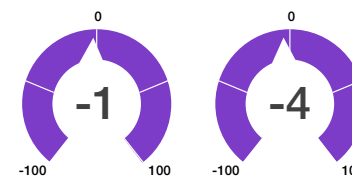
US
Agent-assisted 12 vs Self-service 23
(up from 3 and -2 respectively in 2017)

12   23

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

-1   -4

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

-1   -9
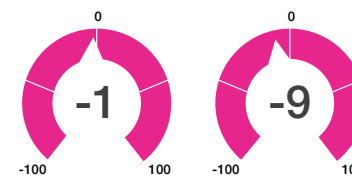
In 2018, US consumers are still using phone most often, however phone declined to 53% of interactions while email doubled and chat tripled

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

Total
1,611
points of contact

69%
of all contacts were **Agent-assisted**

31%
of all contacts were **Self-service**

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

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

Legend:
- Agent-assisted 2017
- Agent-assisted 2018
- Self-service 2017
- Self-service 2018

NICE · inContact

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 / 46
Online Chat / Video Chat	54 / 56
Phone	40 / 48
Social Media / Text	42 / 41
Email	43 / 41

2017
2018

Self-service Channels

Self-service (Aggregate)	39 / 45
Company's Website	38 / 47
Mobile App/ Home Electronic Assist/ Virtual Assistant	49 / 47
Automated Phone Menu	28 / 40

2017
2018
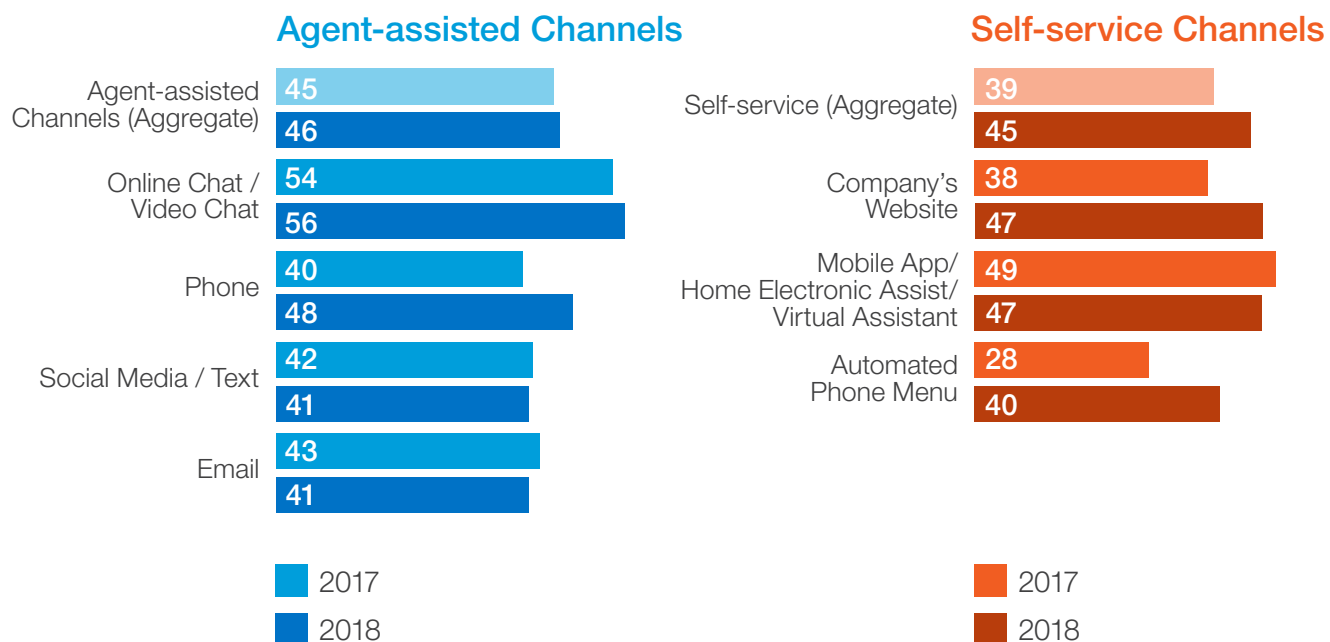
QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?
Unweighted Bases: Agent-assisted (426), Online/Video Chat (106), Phone (115), Email (113), Social Media/ Text (92); Self-service (376), Automated Phone Menu (105), Mobile App/Home Electronic Assist/virtual Assistant (166), Company's Website (105)

NICE · inContact

36

Customers satisfied with their service experience say the channel is easy, quick, fast, simple

Why Communication Methods are Good
(Rated method as 9-10)
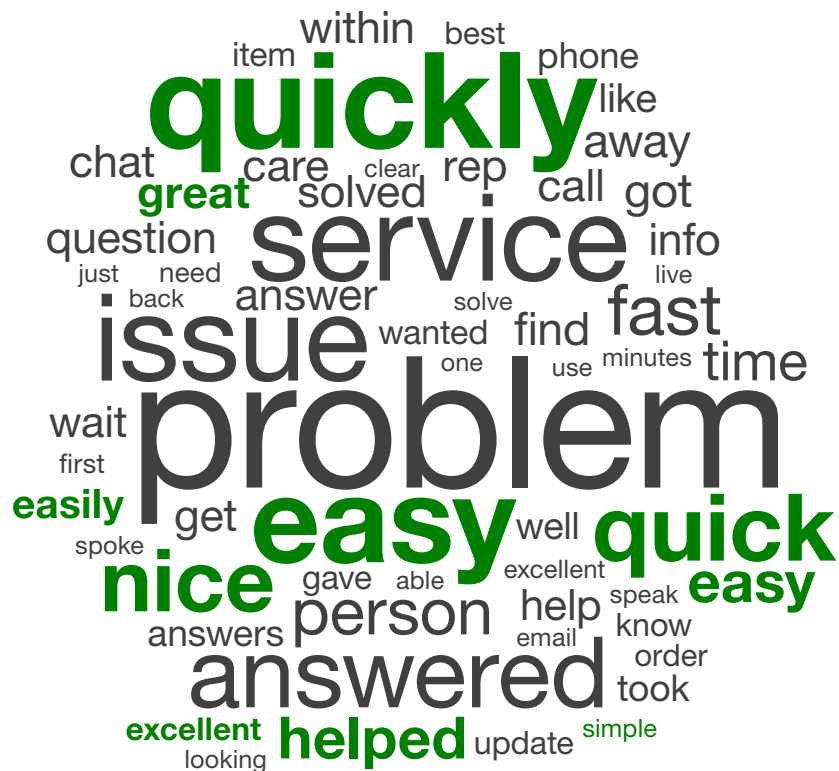
What Needs to Be Improved
(Rated method as 1-8)

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

NICE·inContact

Calling the company to speak with a live rep is the most preferred channel followed by chat, website and email

Preferred Channel Totals

Agent-assisted: 64%	Self-service: 35%

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

Channel	Total	1st	2nd	3rd
You call the company (live rep)	65	32	17	16
You chat online (live rep)	53	17	18	18
You visit the company's website	50	17	15	18
You email the company	43	10	19	14
You call the company and use an automated menu	26	7	9	10
You used the company's mobile app	22	7	8	7
You text message with the company	12	2	5	5
You start a conversation with a company by posting a question on social media	9	2	3	4
You use an "automated" or "virtual assistant"	8	3	2	3
You have a video chat	6	1	2	3
You use a home electronic "virtual assistant" device	4	1	1	2

■■□ Agent-assisted: 1st, 2nd, 3rd choice
■■□ Self-service: 1st, 2nd, 3rd choice

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

NICE · inContact

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)

Preferred Channel Totals

Agent-assisted: 64%	Self-service: 35%
Agent-assisted: 67%	Self-service: 33%

	Channel Preference % Ranked in Top 3 2018	Channel Preference % Ranked in Top 3 2017
You call the company (live rep)	65	67
You chat online (live rep)	53	39
You visit the company's website	50	49
You email the company	43	44
You call the company and use an automated menu	26	26
You use the company's mobile app	22	19
You text message with the company	12	7
You start a conversation with a company by posting a question on social media	9	10
You use an "automated" or "virtual assistant"	8	7
You have a video chat	6	7
You use a home electronic "virtual assistant" device	4	4

NICE · inContact

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

NICE · inContact

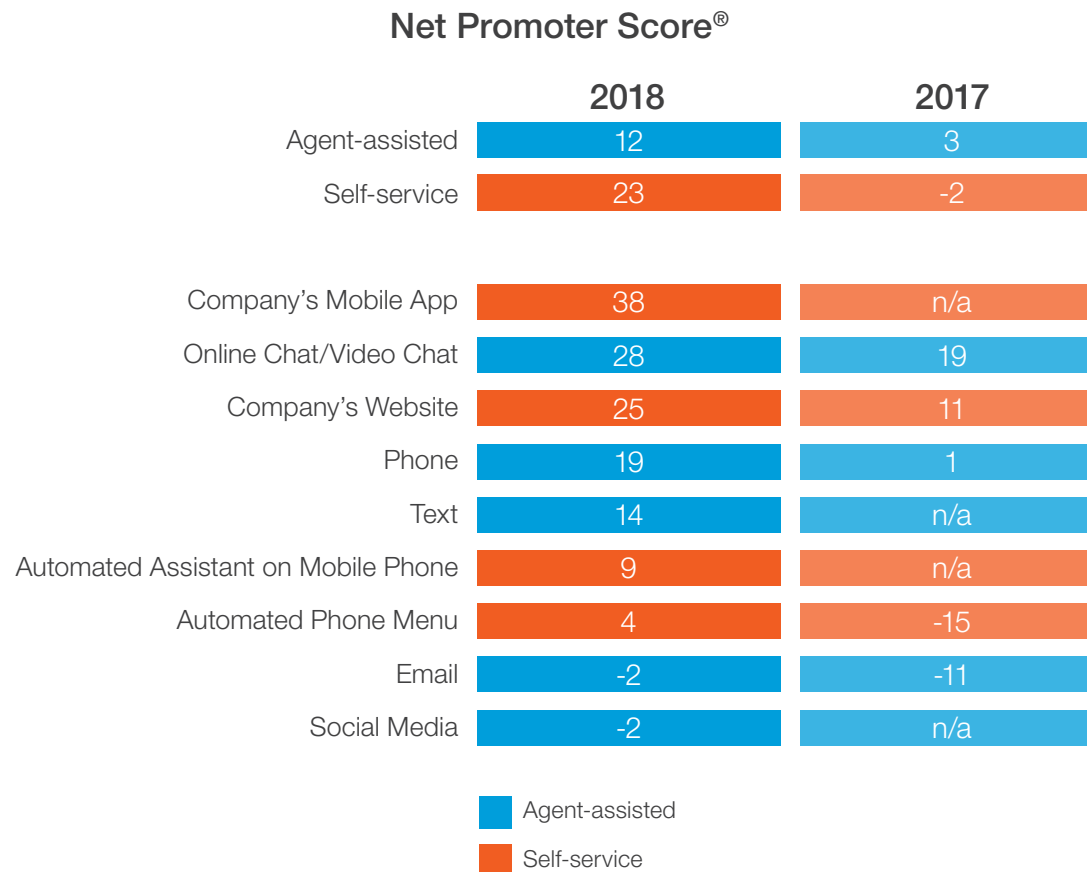# Net Promoter Score® is up significantly in 2018 for Agent-assisted and Self-service channels in the US

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 (ii.e., mobile app, social media, text)

Net Promoter Score®

	2018	2017
Agent-assisted	12	3
Self-service	23	-2
Company's Mobile App	38	n/a
Online Chat/Video Chat	28	19
Company's Website	25	11
Phone	19	1
Text	14	n/a
Automated Assistant on Mobile Phone	9	n/a
Automated Phone Menu	4	-15
Email	-2	-11
Social Media	-2	n/a

■ Agent-assisted
■ Self-service

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?

NICE · inContact

2018 CX Transformation Benchmark

Australia Consumers 2018 Research
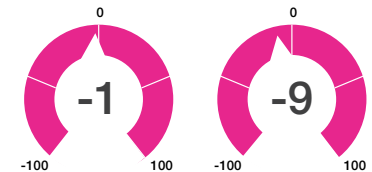
NICE · inContact

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
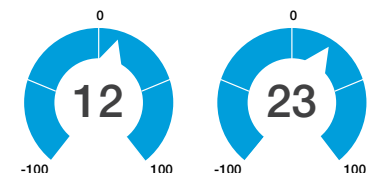
-1 (0, -100, 100)   -9 (0, -100, 100)

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

-1 (0, -100, 100)   -4 (0, -100, 100)

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

12 (0, -100, 100)   23 (0, -100, 100)

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

Total
1,522
points of contact

66%
of all contacts were **Agent-assisted**

34%
of all contacts were **Self-service**

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

Method	%
You called the company and spoke to a live representative	49
You emailed the company	31
You chatted online with a live representative	26
You visited the company's website to seek answers to a question/need	25
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	9
You started a conversation with a company by posting a question or comment on social media	8
You used an automated or virtual assistant online or on your mobile phone	7
You had a video chat with the company	2
You used a home electronic 'virtual assistant' device	1

■ Agent-assisted
■ Self-service

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%)
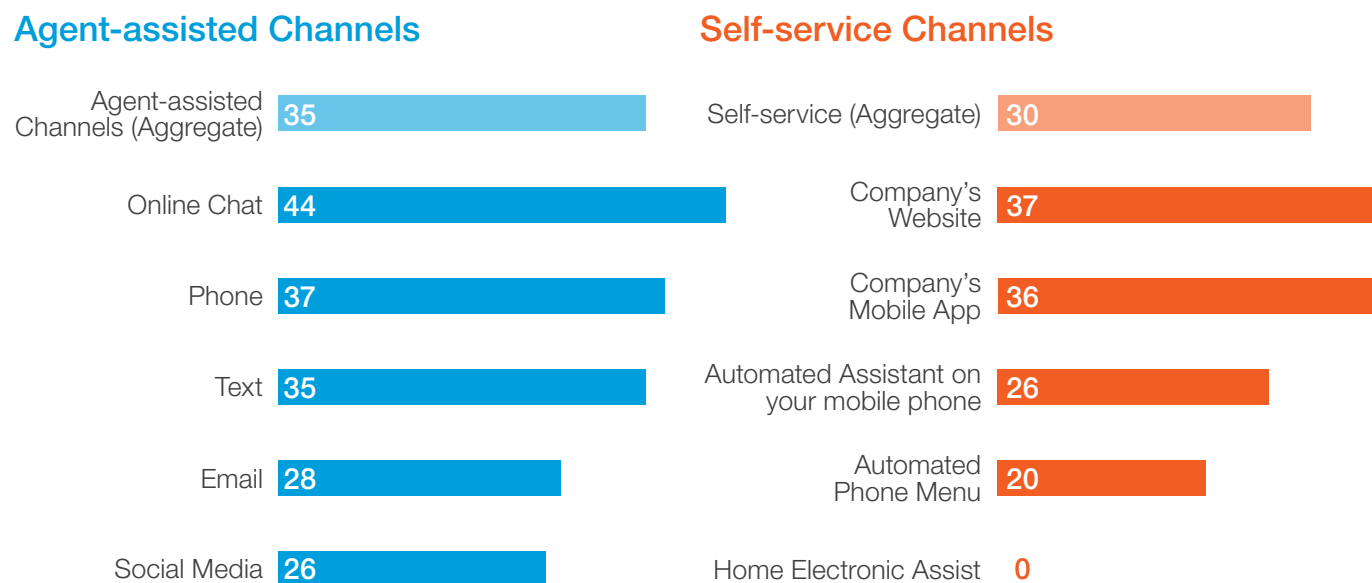
NICE · inContact

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

Satisfaction with Using each Method of Communication
(% Rating as 9/10 and Mean Scores)

Agent-assisted Channels

Channel	Score
Agent-assisted Channels (Aggregate)	35
Online Chat	44
Phone	37
Text	35
Email	28
Social Media	26

Self-service Channels

Channel	Score
Self-service (Aggregate)	30
Company's Website	37
Company's Mobile App	36
Automated Assistant on your mobile phone	26
Automated Phone Menu	20
Home Electronic Assist	0

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)

NICE · inContact

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

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

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

NICE · inContact
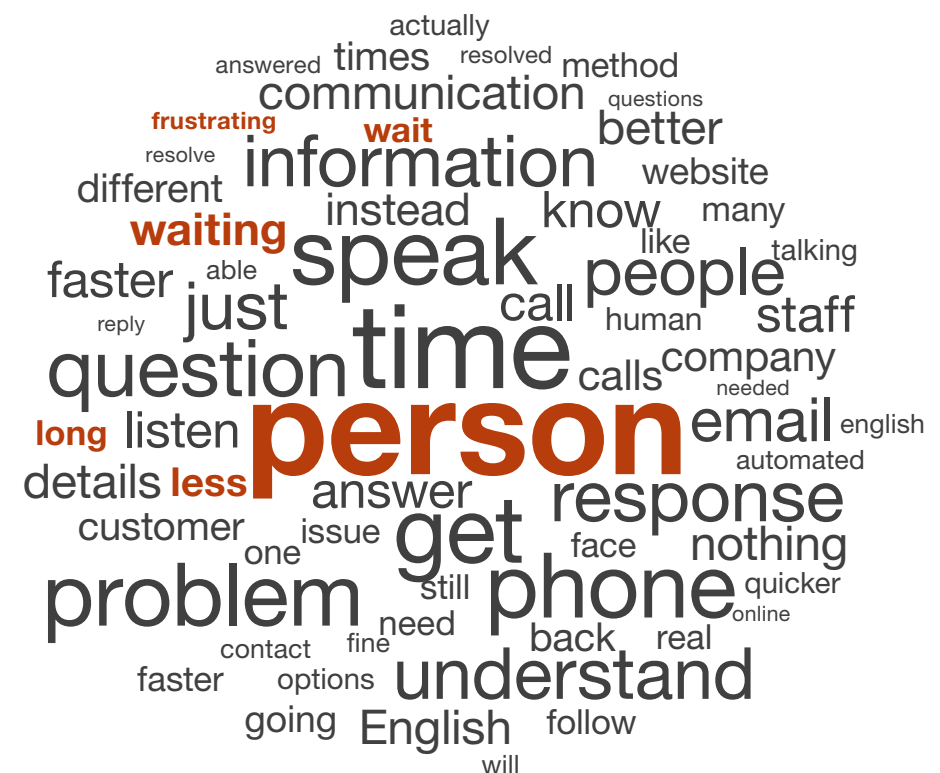
Top preferred channels of communication are speaking to a live representative via phone, emailing the company and online chat

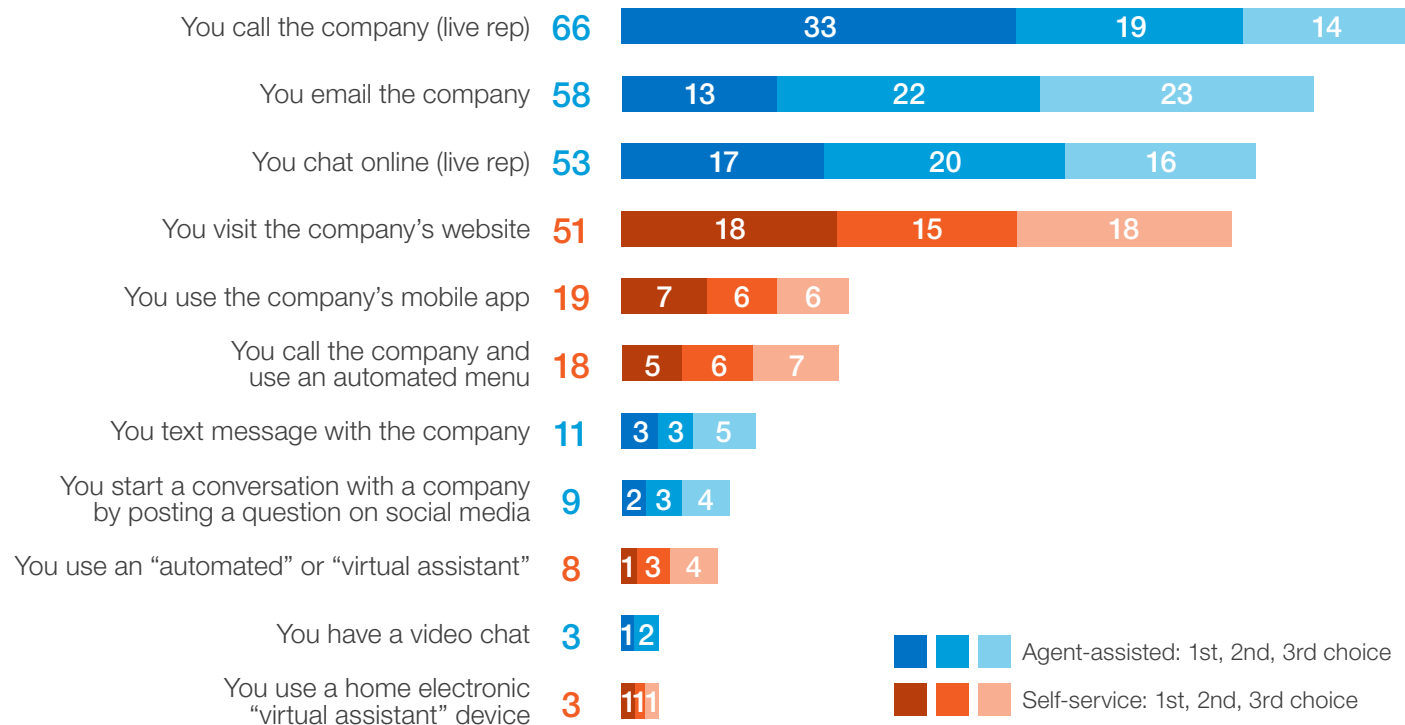Company website is the 4th most often preferred channels

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

Preferred Channel Totals

Agent-assisted: 68%	Self-service: 32%

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

Channel	Total	1st	2nd	3rd
You call the company (live rep)	66	33	19	14
You email the company	58	13	22	23
You chat online (live rep)	53	17	20	16
You visit the company's website	51	18	15	18
You use the company's mobile app	19	7	6	6
You call the company and use an automated menu	18	5	6	7
You text message with the company	11	3	3	5
You start a conversation with a company by posting a question on social media	9	2	3	4
You use an "automated" or "virtual assistant"	8	1	3	4
You have a video chat	3	1	2	
You use a home electronic "virtual assistant" device	3	1	1	1

Agent-assisted: 1st, 2nd, 3rd choice

Self-service: 1st, 2nd, 3rd choice

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.
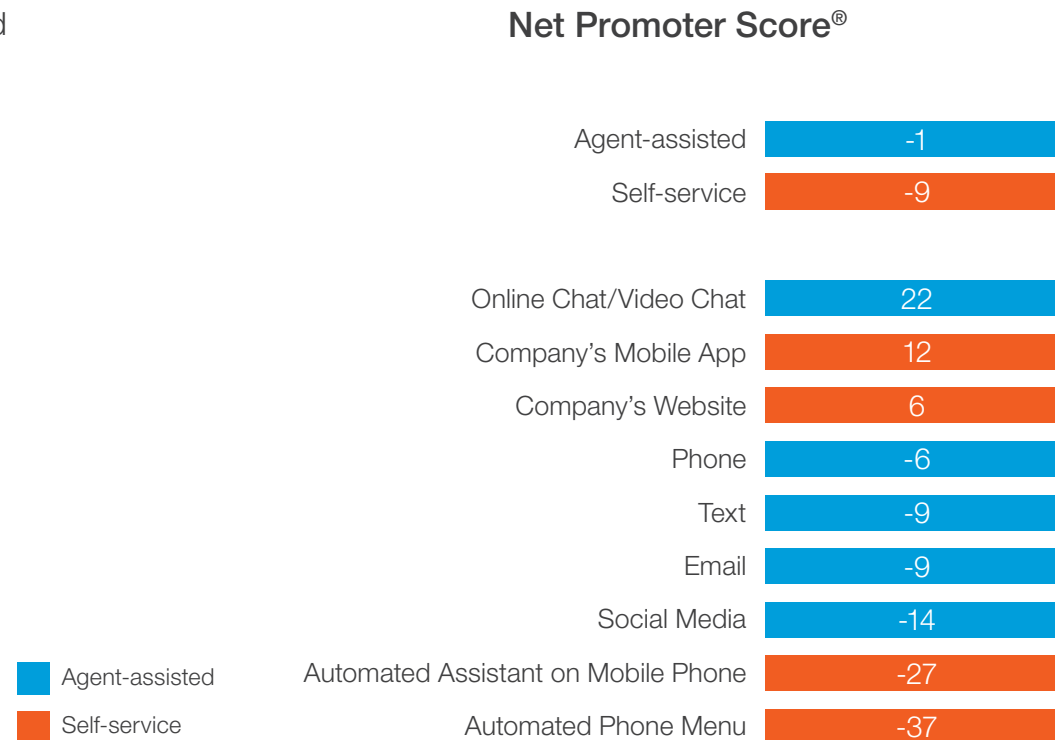Base: Total Respondents, n=803

NICE · inContact

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

NICE · inContact

48

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

Net Promoter Score®

Channel	Score
Agent-assisted	-1
Self-service	-9
Online Chat/Video Chat	22
Company's Mobile App	12
Company's Website	6
Phone	-6
Text	-9
Email	-9
Social Media	-14
Automated Assistant on Mobile Phone	-27
Automated Phone Menu	-37

Agent-assisted
Self-service

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?

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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**

More Resources

An Operations Leaders Guide to Contact Center Solutions White Paper

Powerful Enablers of Omnichannel Customer Loyalty Ebook

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

Total Economic Impact of NICE inContact CXone Research

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