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2020 Customer Experience (CX) Transformation Benchmark

Survey of Global Consumer Experiences

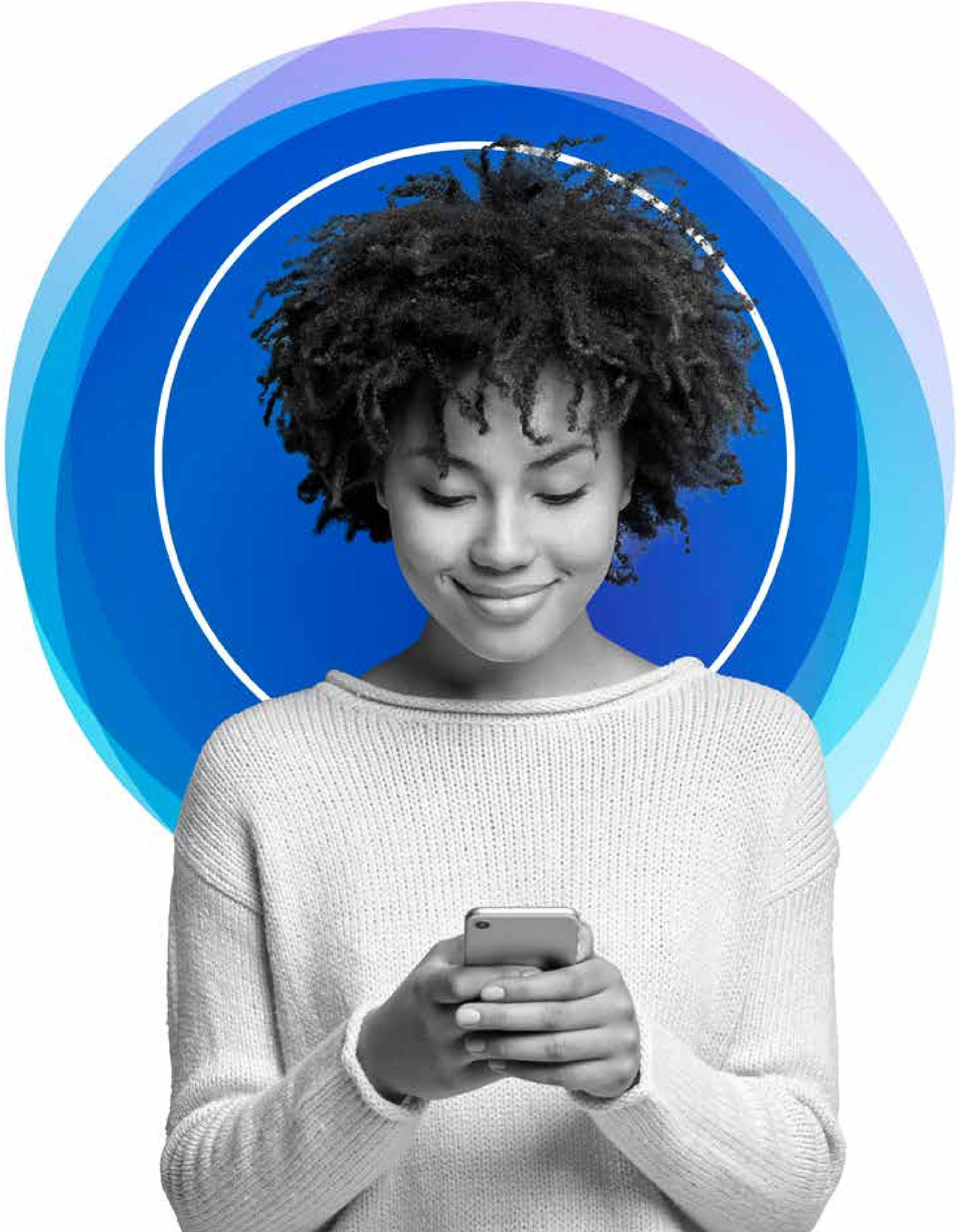

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Table of Contents

Overview

Companies strive to differentiate themselves on the customer service experience, to retain their current customers and to gain new customers. Exceptional customer service has become an essential key to drive company growth. During the pandemic, consumers are turning to customer service more than ever, with usage behaviors shifting as they stay home.

As the customer service technology evolves through artificial intelligence and social media, companies must pivot to meet consumer expectations and create a seamless experience across all channels.

The NICE inContact Customer Experience (CX) Transformation Benchmark is fielded in the US, Canada, UK and Australia with two surveys, one among consumers and one among contact center decision makers.

This report includes:

- Global and region-specific findings from the 2020 consumer wave of the research
- Trends year-over-year as well as comparison of consumer experience with business estimates based on the 2020 business wave of 1,006 global contact center decision makers that was fielded April 2020.
- This is the only research that measures real-world consumer experiences with customer service channels, including satisfaction, preference, ease of use and Net Promoter Score®.

Methodology

Fielding:

- Screening criteria included consumers who communicated with a company through a customer service experience in the last three months.
- The survey was conducted in the United States (n=848), United Kingdom (n=834), Australia (n=500), and Canada (n=501).
- Generations referenced throughout the report are defined as followed:
  - Generation Z: Born 1997-2012, Age 18-22
  - Millennials: Born 1981-1996, Age 23-38
  - Generation X: Born 1965-1980, Age 39-54
  - Baby Boomers: Born 1946-1964, Age 55-73
  - Silent Generation: Born 1928-1945, Age 74-91

Targeted / Actual Quotas:

- Quotas were set in each region for agent-assisted and self-service individual channels. Quotas were as follows:

Agent-assisted	Self-service
Voice calls: 100	IVR: 100
Email: 100	Conversational AI IVR: 50
Chat: 100	Website: 100
SMS / Text: 50	Mobile app: 100
Public social media or private social messaging app: 50	Chatbot / automated assistant: 100 or as many as possible

- Actual channels filled were as follows (global totals):

Agent-assisted	Self-service
Voice calls: 324	IVR: 252
Email: 433	Conversational AI IVR: 149
Chat: 419	Website: 423
SMS / Text: 89	Mobile app: 221
Public social media or private social messaging app: 124	Chatbot / automated assistant: 159

- Additional channels not covered by quotas and noted for small sample sizes:
  - Agent-assisted, video chat: 35
  - Self-service, home electronic assistant: 55

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Major Findings: High Expectations for Omnichannel Service

Consumers have high expectations for seamless omnichannel experiences when moving from one communication method to another such as from phone to text or chat to phone as part of one interaction journey.

96%

96% expect companies to make it easy without the need to repeat information

94%

94% want seamless access to a customer service agent even if they use self-service

95%

95% expect companies to direct them to the channel for the quickest resolution

83%

83% say that if they use a chatbot, they expect to switch to chat, text or phone in the same interaction

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Major Findings: Reality of Omnichannel Experiences

Companies have a long way to go to provide the seamless omnichannel experience consumers expect.

Two-thirds (68%) of consumers say companies are doing a poor job allowing customers to switch seamlessly between methods of communication.* There are improvements since 2019 with more consumers giving a moderate rating (23% in 2020, up 5 points since 2019).

In the majority of experiences, consumers were required to repeat information, thus slowing down the outcome and annoying consumers.**

Start in self-service → Switch to live agent

64% 64% of consumers had to repeat information

Start in one channel → Switch to another channel

59% 59% had to repeat information even though they were communicating with the same agent

Start with one agent → Switch to another agent

70% 70% had to repeat information when switching to a new agent

* CE1. How well do you think companies allow you to switch seamlessly between channels or methods of communication when dealing them (for example, start a process on the website, finish it on the mobile app, or move from an online chat conversation to phone with the same live representative)? "Poor" defined as 0-6 on a scale from 0-10 (with 10 being extremely well, and 0 being extremely poorly).

** EC.4&5. You mentioned that you switched to a [different communication method, different agent], did you have to repeat any information that you had provide previously.

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Major Findings: Business Blind Spots

Businesses that focus on customers recognize the financial and long-term benefits of differentiation based on customer experience.

The NICE inContact 2020 CX Benchmark identifies major gaps where businesses overestimate consumers actual experiences across three key measures including satisfaction (CSAT), first contact resolution (FCR), and Net Promoter Score® (NPS®). The chart on page 15 is a detailed comparison by channel and by channel groupings. An analysis of those gaps are found on pages 19, 22 and 23.

Agent-Assisted Channels Customer Satisfaction Gap

Self-Service Channels Customer Satisfaction Gap

Digital Channels Customer Satisfaction Gap

Automated / AI Channels Customer Satisfaction Gap

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Major Findings: Self-Service Experience

Consumers Want Convenient Self-Service

Consumers (84%) are more willing to do business with companies that offer self-service options. But only 61% say companies offer easy, convenient self-service.

Self-Service Needs Improvement

When rating all self-service channels, only one-third of consumers are highly satisfied. These channels result in negative Net Promoter Scores (NPS) overall at -10 compared to positive scores for agent-assisted channels at 7 (difference of 17 points).

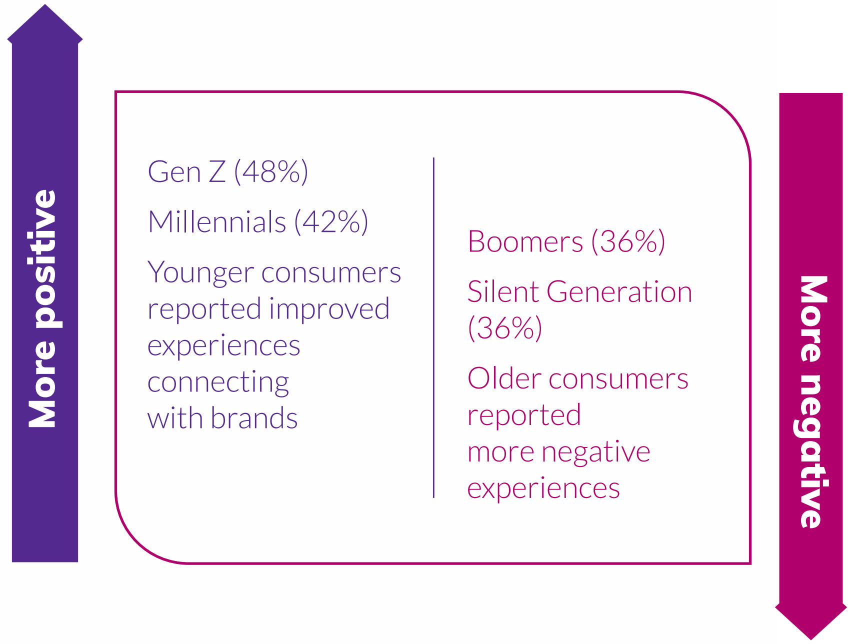
- Website and mobile app receive the highest satisfaction scores, at 36% and 38% respectively.
- On a positive note, ratings for ease of use have improved significantly with 47% of consumers giving extremely easy scores in 2020 (up 11 points from 2019). However, this is still less than half.

Businesses greatly overrate satisfaction with self-service compared to what consumers report based on their actual experiences.

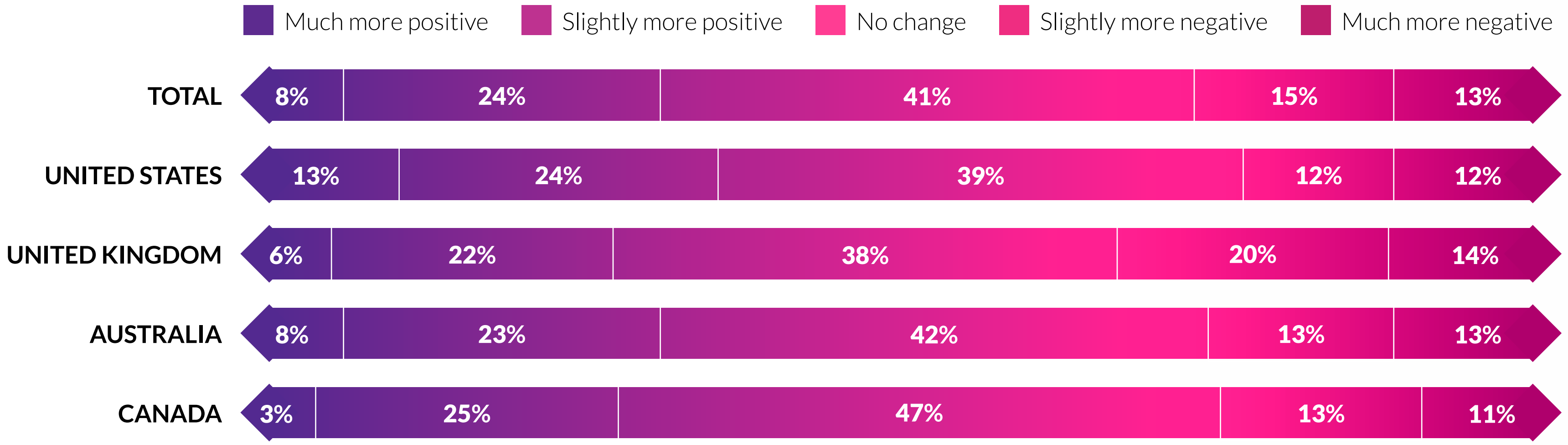
Customer Satisfaction Gap

The Pandemic's Impact on Consumers

During the 2020 global pandemic, interaction volumes for contact centers surged across all interaction types. One in four consumers increased the number of times they reached out to businesses compared to the months before the pandemic began. Consumers reported using website more frequently (42%), as well as phone (33%), online chat (32%), and email (32%). Overall many consumers reported that the quality of customer service was about the same, however 28% experienced more negative interactions.



Consumer Experience During Pandemic



Channel Descriptions for Consumers

Channel	Description
Phone	You called the company and spoke to a live representative
Email	You emailed the company
Online chat	You chatted online with a live representative
Mobile app	You used the company's mobile app
IVR	You called the company and used an automated menu ("Press or say 1 for…") for the entire call
Automated assistant / chatbot	You used a chatbot / automated assistant online or on their mobile phone
Text	You text messaged with the company on your mobile device
Website	You visited the company's website to seek answers to a question/need
Home electronic assistant[1]	You used a home electronic 'virtual assistant' device (for example, Amazon Alexa, Echo or Google Home)
Private social messaging app	You started a conversation with a company by posting a question or comment using a private social messaging app (such as messaging over WhatsApp, Facebook Messenger, WeChat, etc.)
Public social media	You started a conversation with a company by posting a question or comment on public social media (such as Facebook page wall comments, Twitter posts, etc.)
Conversational AI IVR	You called the company and spoke to an automated voice assistant
Video chat[1]	You had a video chat with the company

Agent-assisted in blue, Self-service in pink
[1] Note small sample sizes for home electronic assistant, video chat

Consumer Channels and Experience: 2020 Global Findings

Channel	% Usage[2]	% Satisfaction (9/10)	% Preference (Top 3 rank)	Net Promoter Score® (NPS®)	First Contact Resolution (FCR)
Phone	46%	45%	61%	10	71%
Email	39%	30%	54%	-5	54%
Online chat	32%	41%	52%	15	69%
Mobile app	11%	38%	16%	9	66%
IVR	14%	21%	17%	-25	52%
Automated assistant / chatbot	9%	16%	13%	-30	41%
Text	9%	25%	10%	-3	53%
Website	26%	36%	44%	-4	60%
Home electronic assistant[1]	3%	49%	3%	35	65%
Private social messaging app	9%	34%	8%	19	63%
Public social media	7%	33%	6%	22	55%
Conversational AI IVR	10%	23%	12%	-26	42%
Video chat[1]	6%	26%	5%	9	49%

Agent-assisted in blue, Self-service in pink

[1] Note small sample sizes for home electronic assistant, video chat

[2] Customer service interactions in the last 3 months

Consumer Experience: 2020 Global Trends

Channel	% Usage[2]		% Satisfaction (9/10)		% Preference (Top 3 rank)		Net Promoter Score® (NPS®)		First Contact Resolution (FCR)	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Phone	47%	46%	48%	45%	65%	61%	14	10	72%	71%
Email	32%	39%	41%	30%	51%	54%	3	-5	55%	54%
Online chat	28%	32%	48%	41%	55%	52%	13	15	69%	69%
Mobile app	22%	11%	39%	38%	18%	16%	0	9	65%	66%
IVR	16%	14%	26%	21%	18%	17%	-24	-25	53%	52%
Automated assistant / chatbot	13%	9%	30%	16%	11%	13%	-4	-30	70%	41%
Text	10%	9%	39%	25%	10%	10%	6	-3	58%	53%
Website	7%	26%	31%	36%	45%	44%	-8	-4	45%	60%
Home electronic assistant[1]	7%	3%	31%	49%	2%	3%	-14	35	50%	65%
Private social messaging app	6%	9%	47%	34%	8%	8%	21	19	67%	63%
Public social media	6%	7%	24%	33%	6%	6%	-8	22	48%	55%
Conversational AI IVR	3%	10%	42%	23%	8%	12%	17	-26	38%	42%
Video chat[1]	3%	6%	39%	26%	5%	5%	9	9	64%	49%

Agent-assisted in blue, Self-service in pink. Box around number indicates it statistically significantly higher or lower from previous year.

[1] Note small sample sizes for home electronic assistant, video chat

[2] Customer service interactions in the last 3 months

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Consumer Experience: Trends by Channel Types

Channel	% Satisfaction (9/10)		Net Promoter Score® (NPS®)		First Contact Resolution (FCR)	
	2019	2020	2019	2020	2019	2020
Agent-assisted	43%	33%	9	7	63%	62%
Self-service	32%	31%	-9	-10	58%	55%
Digital channels*	38%	33%	2	2	73%	59%
Traditional channels**	37%	33%	-4	-5	63%	63%
Automated / Artificial Intelligence (AI)***	32%	29%	-5	-19	60%	45%
Social media	35%	34%	6	20	57%	59%

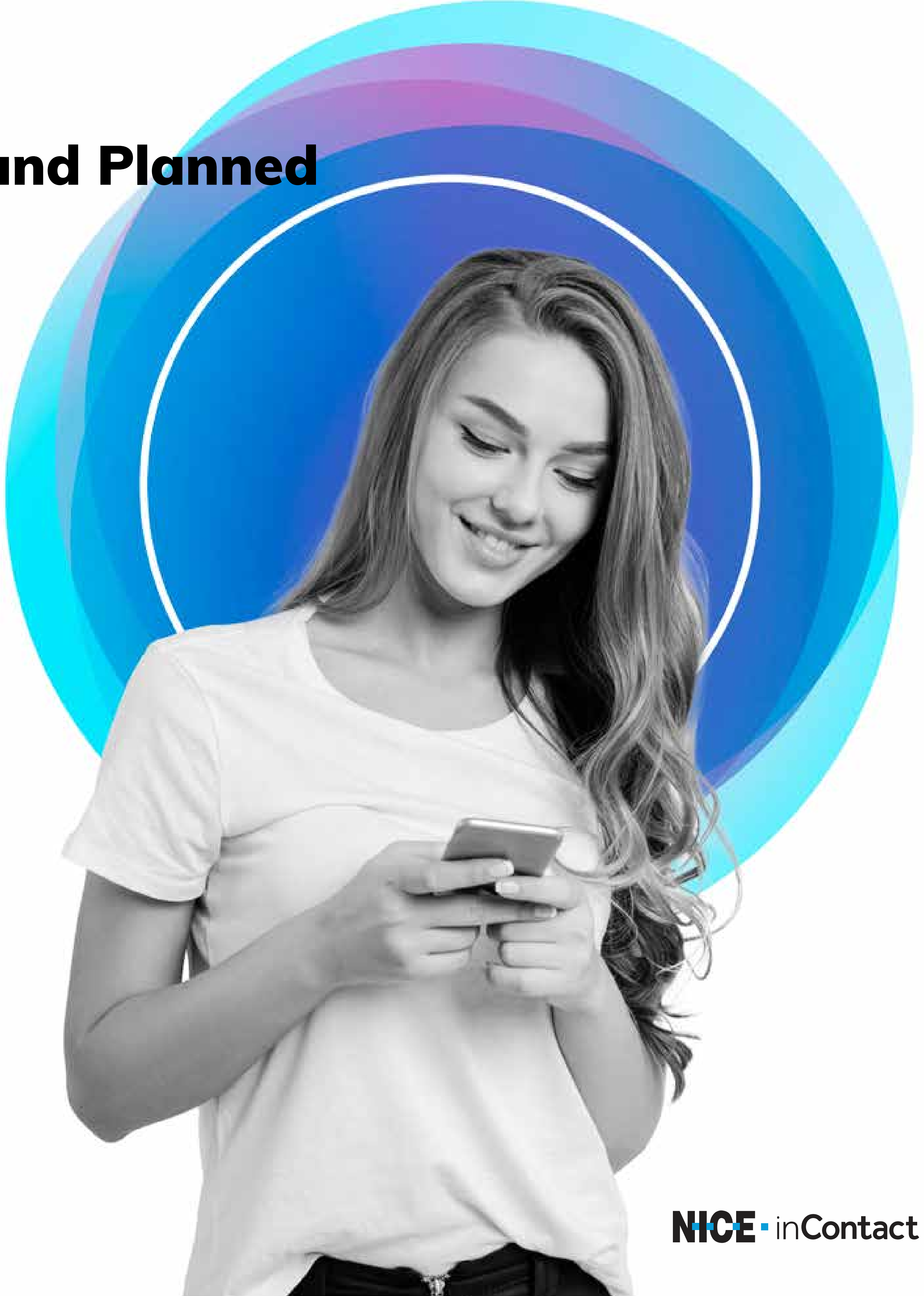
Agent-assisted in blue, Self-service in pink. Box around number indicates it statistically significantly higher or lower from previous year.
* Digital channels include email, website, chat, social media, mobile app, text, automated assistant/chatbot
** Traditional channels include phone, IVR
***Automated / AI includes automated assistant/chatbot, conversational AI IVR, home electronic assistant

Consumer Channel Usage: 2020 Current and Planned

Channel	% Usage Last 3 months	% Plan to Use Next 3 months	% Plan to Use Next 12 months
Phone	46%	57%	61%
Email	39%	52%	57%
Online chat	32%	42%	44%
Mobile app	11%	32%	30%
IVR	14%	21%	15%
Automated assistant / chatbot	9%	14%	15%
Text	9%	11%	9%
Website	26%	10%	9%
Home electronic assistant[1]	3%	9%	7%
Private social messaging app	9%	8%	7%
Public social media	7%	7%	6%
Conversational AI IVR	10%	3%	4%
Video chat[1]	6%	3%	3%

Agent-assisted in blue, Self-service in pink

[1] Note small sample sizes for home electronic assistant, video chat



Comparison[†] Global Findings: Consumer vs. Business

Channel	% Satisfaction (9/10)			Net Promoter Score® (NPS®)			First Contact Resolution (FCR)		
	Consumer	Business	Difference	Consumer	Business	Difference	Consumer	Business	Difference
Phone	45%	46%	-1	10	37	-27	$\boxed{71\%}$	45%	26
Email	30%	$\boxed{45\%}$	-15	-5	31	-36	$\boxed{54\%}$	35%	19
Online chat	41%	$\boxed{48\%}$	-7	15	38	-23	$\boxed{69\%}$	33%	36
Mobile app	36%	$\boxed{48\%}$	-12	-4	44	-48	$\boxed{60\%}$	28%	32
IVR	21%	$\boxed{41\%}$	-20	-25	21	-46	$\boxed{52\%}$	25%	27
Automated assistant / chatbot	38%	43%	-5	9	34	-25	$\boxed{41\%}$	23%	18
Text	25%	$\boxed{40\%}$	-15	-3	29	-32	$\boxed{53\%}$	23%	30
Website	23%	$\boxed{47\%}$	-24	-4	37	-41	$\boxed{42\%}$	28%	14
Home electronic assistant[1]	16%	$\boxed{46\%}$	-30	-30	43	-73	$\boxed{41\%}$	21%	20
Private social messaging app	34%	$\boxed{43\%}$	-9	19	34	-15	$\boxed{63\%}$	24%	39
Public social media	33%	$\boxed{36\%}$	-3	22	21	1	$\boxed{55\%}$	25%	30
Conversational AI IVR	49%	41%	8	35	29	6	$\boxed{65\%}$	22%	43
Video chat[1]	26%	$\boxed{53\%}$	-27	9	41	-32	$\boxed{49\%}$	30%	19
Agent-Assisted	33%	$\boxed{44\%}$	-11	7	33	-26	$\boxed{62\%}$	30%	32
Self-service	31%	$\boxed{44\%}$	-13	-10	34	-44	$\boxed{55\%}$	24%	31
Digital channels*	33%	$\boxed{45\%}$	-12	-1	34	-35	$\boxed{58\%}$	24%	34
Traditional channels**	29%	$\boxed{44\%}$	-15	-2	30	-32	$\boxed{63\%}$	30%	33
Automated / AI***	29%	$\boxed{44\%}$	-15	-2	34	-36	$\boxed{57\%}$	22%	35
Social media	34%	$\boxed{41\%}$	-7	20	27	-7	$\boxed{59\%}$	24%	35

† Comparison is based on customer service interactions in the last 3 months vs business estimates of the service they deliver.
Agent-assisted in blue, Self-service in pink. Box around number indicates it statistically significantly higher or lower.

* Digital channels include email, website, chat, social media, mobile app, text, automated assistant/chatbot

** Traditional channels include phone, IVR

***Automated / AI includes automated assistant/chatbot, conversational AI IVR, home electronic assistant

[1] Note small sample sizes for home electronic assistant, video chat

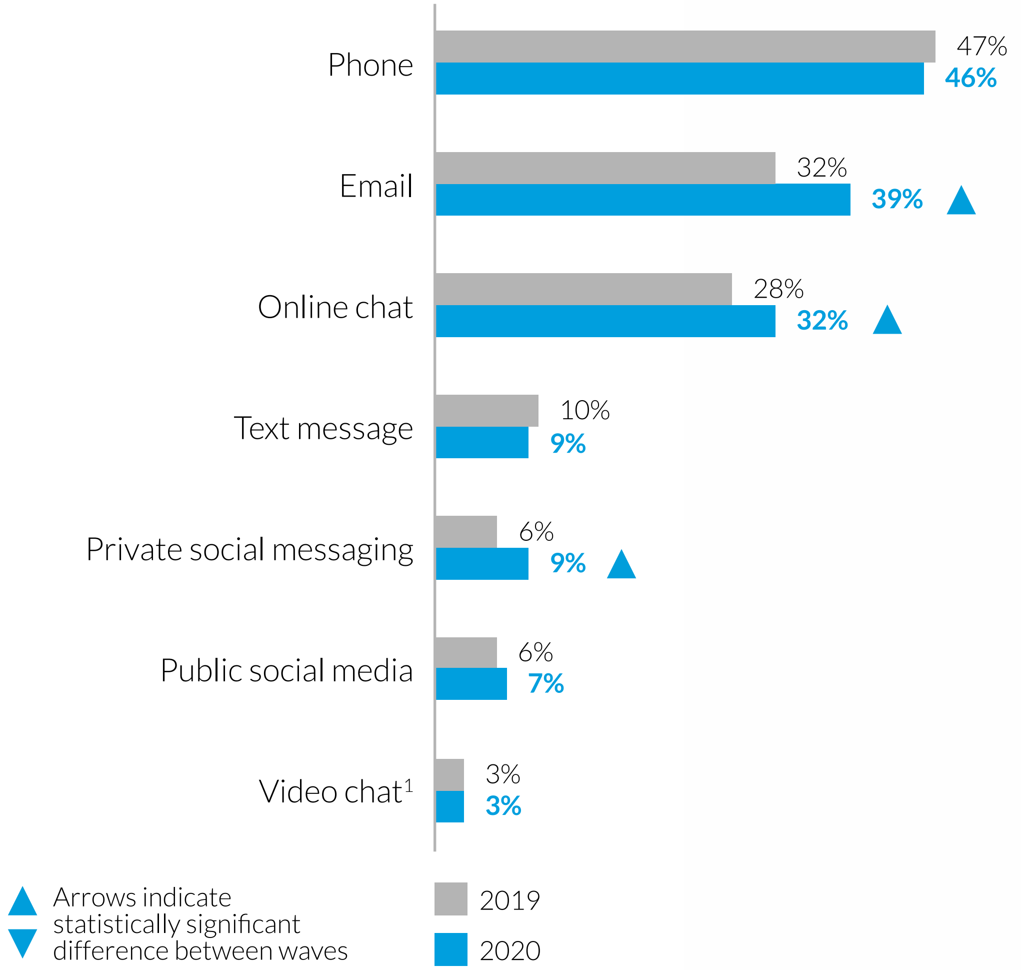
Key Findings & Analysis

Consumer Use of Agent-Assisted Channels

While consumers continue to rely heavily on agent-assisted channels as they interact with companies, in 2020 they reported a significantly increased use of digital channels including email and chat. Private social messaging jumped to about the same usage as text messaging.

- Gen Z, Millennials and Gen X are more likely to use digital and social media channels.
- When asked about the channels they plan to use in the next six months, Gen Z and Millennials are less likely to say they will use phone, and more likely to use text and social media.
- Gen Z is the only group where phone is not the #1 planned channel. For them, email is #1.
- Mirroring their actual usage, consumers express higher preference for agent-assisted channels including phone, email and chat.
- Gen Z and Millennials lean towards email and online chat as their most preferred channels compared to older groups who are the most likely to include phone in their top 3 most preferred.
- Those with 5000+ employees are most likely to be able to handle 7+ (10%).

Consumers Using Agent-Assisted Channels*



* S4.1&2. You mentioned you had a customer service experience in the past three months with a company. As explained earlier, there are several ways customers can have contact with a company. In which of the following ways did you communicate or interact during this experience?

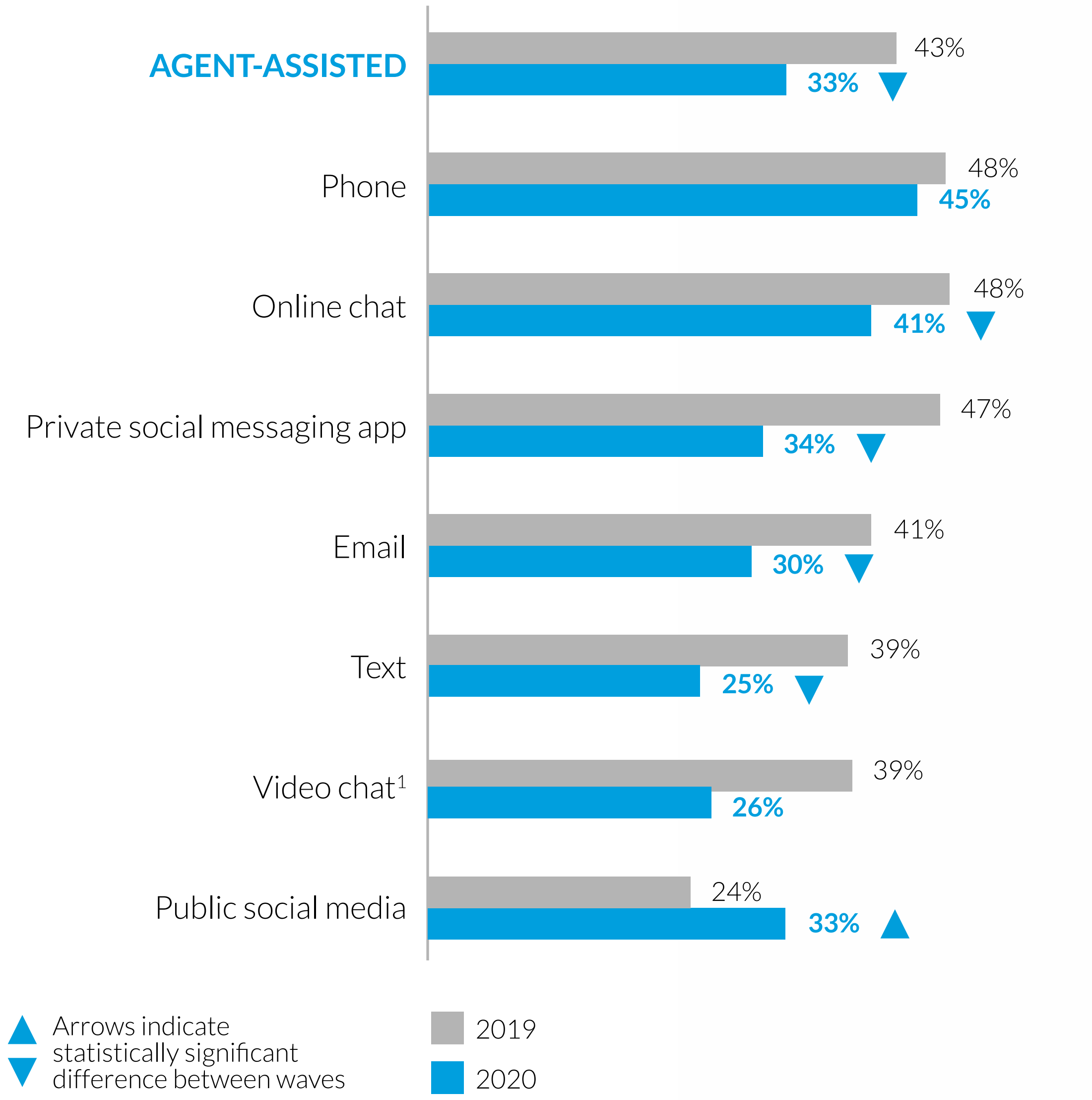
[1] Note small sample size for video chat

Consumer Experiences with Contact Center Agents

When rating all agent-assisted channels, consumers are significantly less satisfied with their experiences* in 2020, with only 33% reporting that they are highly satisfied with their actual experience in those channels (down 10 points since 2019).

- Agent-assisted is regarded as easier to use*** with 44% of consumers rating agent-assisted as extremely easy compared to 34% for self-service. However, this is a major decline, down 7 points from 51% for agent-assisted in 2019).
- Net Promoter Score (NPS) remains steady for agent-assisted channels as a group, however there are changes by several points for individual channels that are mostly down. The only increase is in public social media. Overall NPS for agent-assisted channels is higher than self-service mostly in positive territory (see page 11).
- When customers are satisfied with agent-assisted channels, they cited speed, ease and friendliness. When dissatisfied, waiting too long was the primary reason.

Satisfaction with Agent-Assisted Service* Highly Satisfied (9/10)



* CH1.1 Thinking about that recent customer service experience using [channel], how satisfied were you overall with this method of communication during your experience?
** CH1.2 Thinking about that recent customer service experience using [channel], how easy or difficult was your experience with this method of communication?
***P1. Thinking about when you used [channel], was your question answered or your problem resolved? And which would you say best describes your experience when you used [channel], would you say … 1. It was handled the first time, and I didn't need to do anything else on my own or with an agent 2. It took more than one time to get my question answered or my problem resolved
[1] Note small sample size for video chat

Agent-Assisted Channels: Experiences vs. Business Estimates

Looking across agent-assisted channels, consumers rate their experiences much lower than businesses in two of three measures: CSAT and NPS. On the other hand, consumers give higher ratings than businesses for FCR. And for customer effort (CES), consumers and businesses rate them nearly the same.

- Businesses overestimate customer satisfaction with all agent-assisted channels (-11 points).*
  - Email and chat (-15 points each) were among the largest gaps.
  - Customer satisfaction with phone shows the smallest gap (1 point).
- Consumers give every method of communication a lower Net Promoter Score (NPS) than businesses estimate (-26 points overall) except for social media (+1 point).**
- Interestingly, consumers give higher ratings for First Contact Resolution (FCR) than what businesses estimate. Consumers say their problem is resolved 62% of the time (compared to businesses reporting only 30% of contacts resolved the first time).

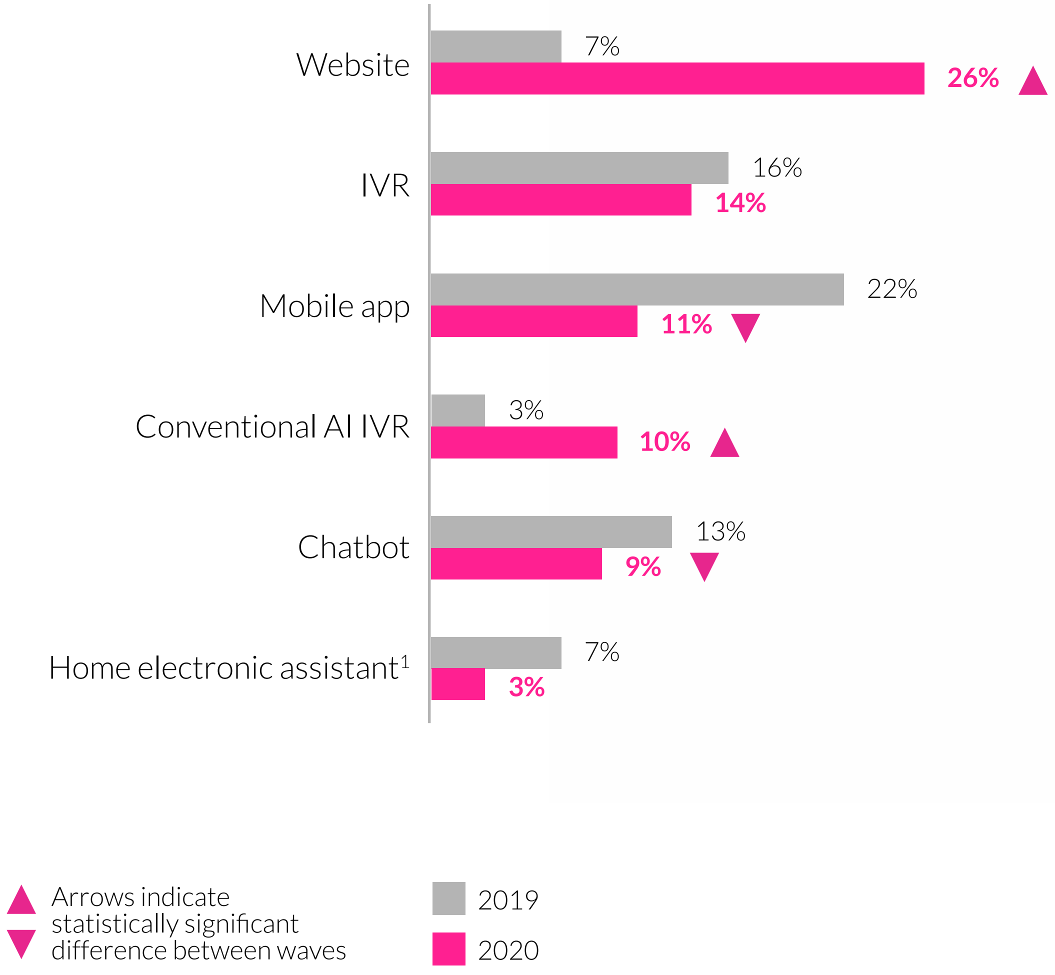
* CH1.1 Thinking about that recent customer service experience using [CHANNEL], how satisfied were you overall with this method of communication during your experience?
** CH1.3 Based on the result of your recent experience using [CHANNEL], how likely would you be to recommend that company to others or if asked by family, friends or colleagues?
***Consumer P1. Thinking about when you used [CHANNEL], was your question answered or your problem resolved? / Business P1. For each channel that you said customers interact with your company, what percentage of the time is the service experience resolved during the first point of contact?

Consumer Use of Self-Service Channels

Self-service interactions accounted for 36% of interactions reported (staying unchanged overall since 2019). Using a company website for self-service showed the biggest increase. Mobile apps and chatbots were down.

- Boomers and the Silent Generation are more likely than younger generations to report using self-service in 2020.
- Half of consumers who start with self-service are transferred to a live agent. Unfortunately, two-thirds of those who are transferred say that they need to repeat the information they previously provided in the self-service channel.
  - Interestingly, Millennials are far more likely than other age groups to claim they were transferred (70%), while Boomers report the lowest transfer rates (40%).
- Preference for self-service channels has held steady over the last year. Yet no self-service channel is more preferred than any agent-assisted option.
  - Traditional IVR as well as conversational AI IVR (or automated voice assistant) are consistently among the least preferred methods. The primary reason given is preference for interacting with a human (37%). However, three other reasons are also given including lack of confidence to get what is needed (26%), taking too long (23%) and disliking automated systems (21%).

Consumers Using Self-Service Channels*



* S4.1&2. You mentioned you had a customer service experience in the past three months with a company. As explained earlier, there are several ways customers can have contact with a company. In which of the following ways did you communicate or interact during this experience?

[1] Note small sample size for home electronic assistant

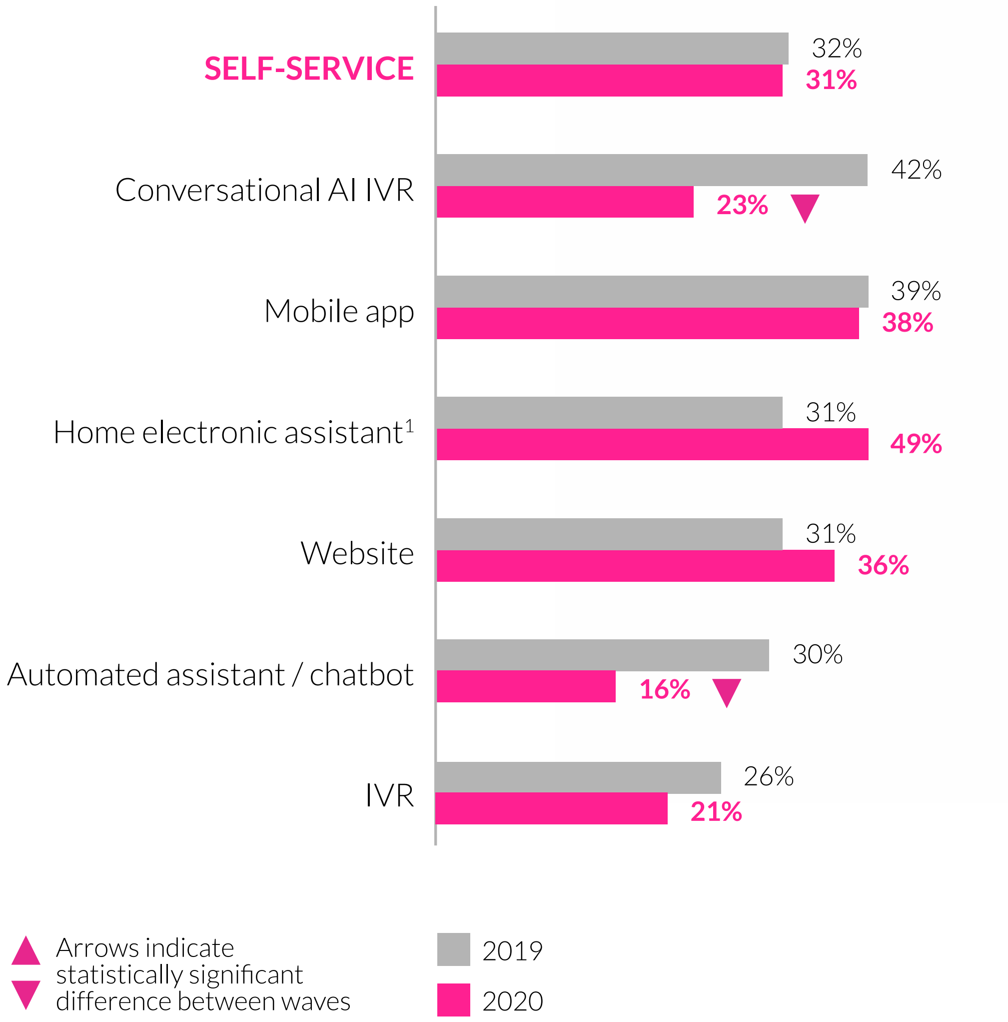
Consumer Experiences with Self-Service

When rating all self-service channels, only one-third of consumers are highly satisfied.* Notably, consumers are much less satisfied with AI-driven self-service channels in 2020 including conversational AI IVR and chatbots.

Ratings for ease of use** have increased significantly in 2020 up 11 points to 47% of consumers giving extremely easy scores. This was likely due to significant improvement for websites (up 12 points to 39% vs 27% in 2019).

- First Contact Resolution*** is down slightly in 2020 at 55% of interactions (down 3 points since 2019). Chatbots had biggest drop in FCR declining 29 points to 41% vs 70% in 2019. On the other hand websites saw a big gain for FCR improving 15 points to 60% vs. 45% in 2019.
- Net Promoter Score (NPS) slightly improved for self-service but is still in negative territory at -10. IVR and chatbots are -25 and -30 respectively (see page 11).
- When customers are satisfied with self-service, they cited speed and ease of use. When dissatisfied, they reported not getting what was needed or lack of caring.
- Lack of confidence to get that is needed (26%), taking too long (23%) and disliking automated systems (21%).

Satisfaction with Self-Service* Highly Satisfied (9/10)



* CH1.1 Thinking about that recent customer service experience using [channel], how satisfied were you overall with this method of communication during your experience?
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***P1. Thinking about when you used [channel], was your question answered or your problem resolved? And which would you say best describes your experience when you used [channel], would you say ... 1. It was handled the first time, and I didn't need to do anything else on my own or with an agent 2. It took more than one time to get my question answered or my problem resolved
[1] Note small sample size for home electronic assistant

Self-Service Channels: Consumer Experiences vs. Business Estimates

Although businesses want more consumers to use self-service, they will need to improve the experience in those channels. Consumers are much less satisfied than businesses estimate.

- Consumers rate customer satisfaction lower than businesses estimate (-13 points).* The gaps are biggest for websites (-24 points) and IVR (-20 points).
- Net Promoter Scores (NPS) have an even bigger gap than CSAT with consumers reporting NPS 44 points lower than businesses estimate. All but one channel had a lower NPS score.
  - One channel, conversational IVR faired well with consumers rating NPS points higher than businesses estimate (35 vs 29).**
- Consumers are more positive than businesses about first contact resolution (FCR) for self-service with 55% of consumers saying their issues was resolved vs businesses estimating that only 24% of self-service interactions are resolved the first time.***

* CH1.1 Thinking about that recent customer service experience using [CHANNEL], how satisfied were you overall with this method of communication during your experience?
** CH1.3 Based on the result of your recent experience using [CHANNEL], how likely would you be to recommend that company to others or if asked by family, friends or colleagues?
***Consumer P1. Thinking about when you used [CHANNEL], was your question answered or your problem resolved? / Business P1. For each channel that you said customers interact with your company, what percentage of the time is the service experience resolved during the first point of contact?

Digital Channels: Consumer Experiences vs. Business Estimates

Consumers rate customer satisfaction lower in every digital channel than what businesses think they experience.

- Businesses overestimate customer satisfaction within all digital channels with the largest gaps for website (-24 points), email and text (-15 points each).*
- Digital channels also have significantly lower NPS scores than what businesses estimate. Consumers give every digital method of communication a lower Net Promoter Score (NPS) score.**
  - The largest gaps include mobile app (-48 points), website (-41 points) and email (-36 points).**
- 58% of consumers experience first contact resolution (FCR) with digital channels, but businesses report FCR only 24% of the time in digital channels.***

Customer Satisfaction Gap

Net Promoter Score (NPS) Gap

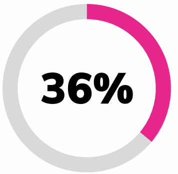
* CH1.1 Thinking about that recent customer service experience using [CHANNEL], how satisfied were you overall with this method of communication during your experience?
** CH1.3 Based on the result of your recent experience using [CHANNEL], how likely would you be to recommend that company to others or if asked by family, friends or colleagues?
***Consumer P1. Thinking about when you used [CHANNEL], was your question answered or your problem resolved? / Business P1. For each channel that you said customers interact with your company, what percentage of the time is the service experience resolved during the first point of contact?

AI for Customer Service: Consumer Use and Attitudes

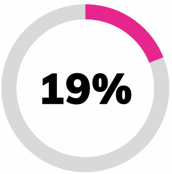
2020 saw significant growth with most consumers using artificial intelligence (AI) for customer service—67%—up from 46% in 2019.

While chatbot usage has increased significantly, the strongest emotion that consumers report feeling is frustration (22%) or anger (11%) related to using chatbots. Very few—less than 6% feel trust, curiosity or surprise.

- Almost all consumers say they prefer to interact with a live agent (92%) instead of a chatbot. 80% of consumers still believe chatbots need to get smarter in order to use them regularly.
- Looking to the future as AI improves, some consumers see the benefits. Gen Z and Millennials are more likely to agree with the statements below than the general population.

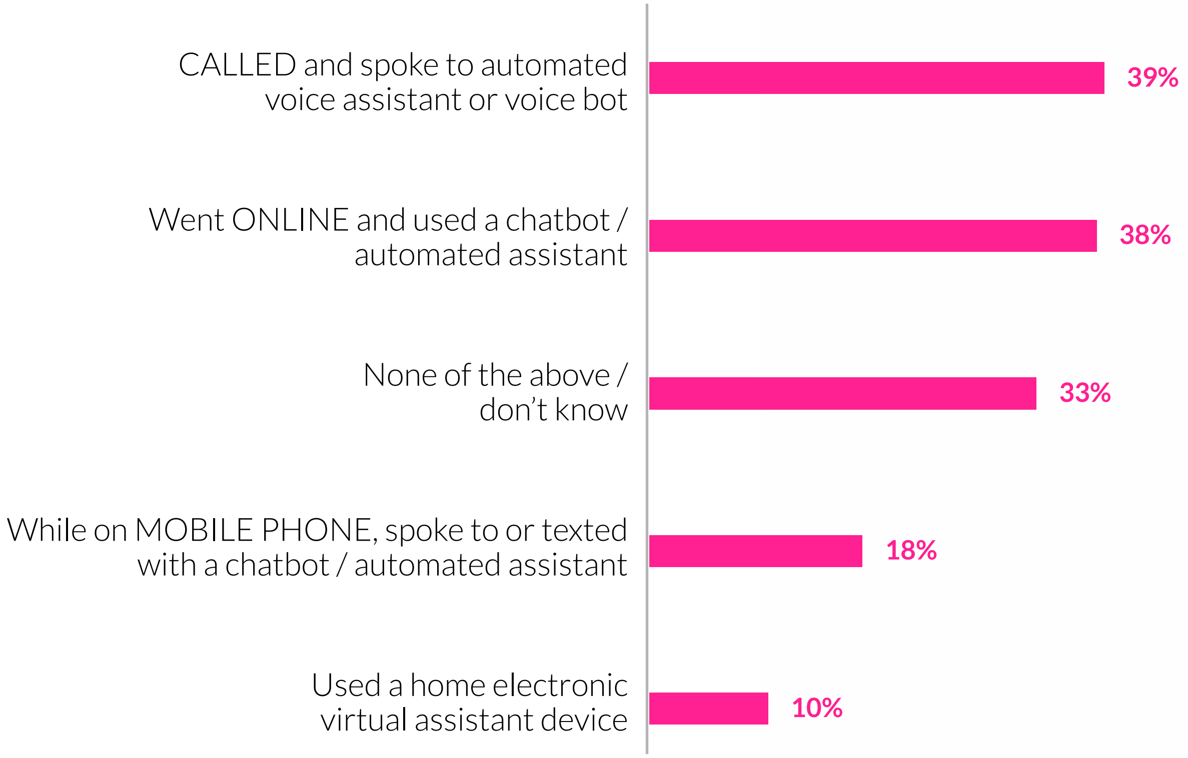


36% agree that chatbots and virtual assistants make it faster to get issues resolved for customer service (down 4 points from 2019). About the same portion of consumers agree that chatbots make it easier to get issues resolved (35%).



19% agree that they "trust chatbots more than live customers service agents when sharing personally identifiable information or for financial transactions."

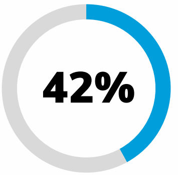
Consumers Using AI for Customer Service



Social Messaging Apps for Customer Service

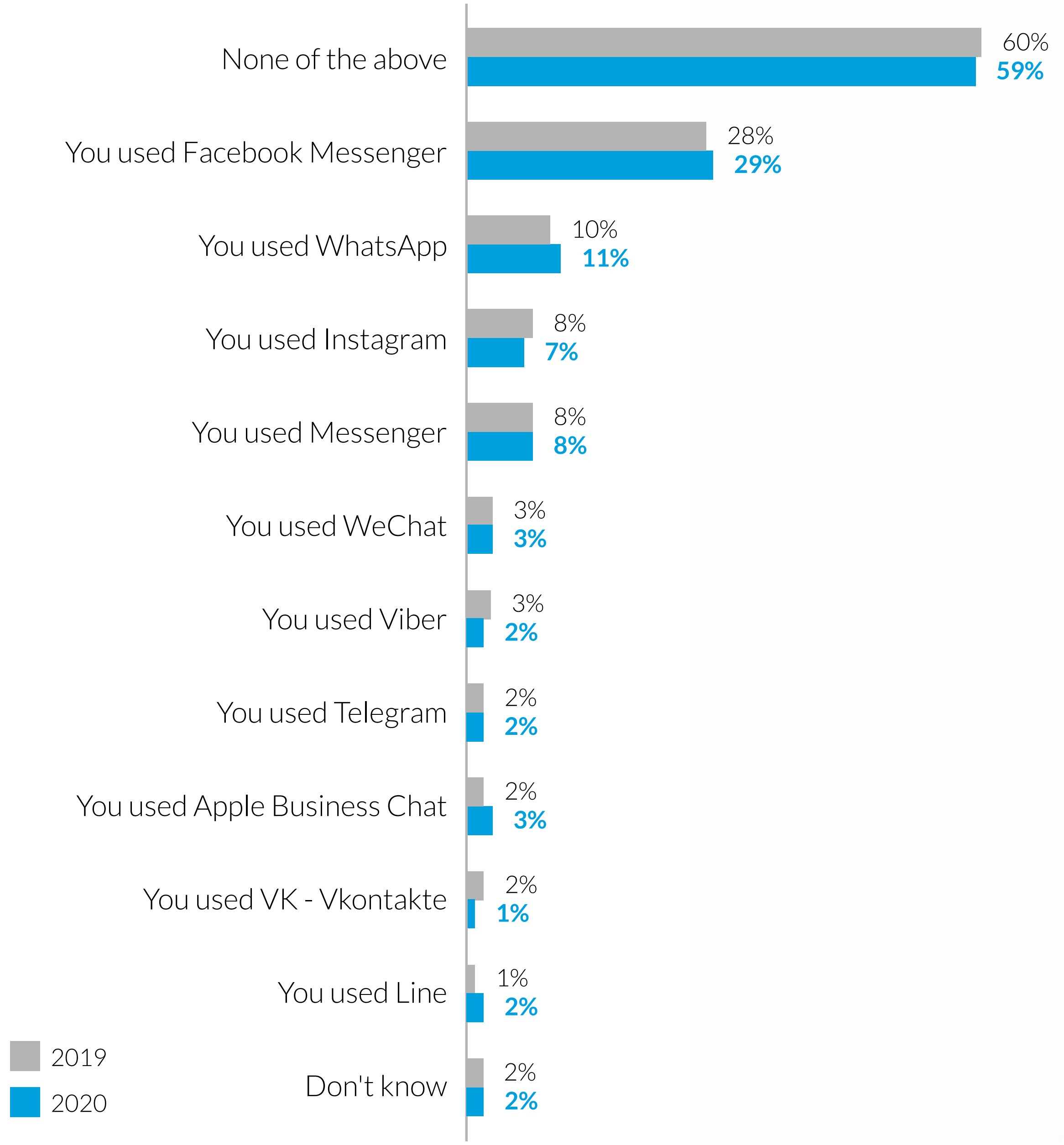
Half of consumers expect companies to allow them to interact via private social messaging apps. This is especially important for Gen Z and Millennials with one-in-four in agreement. The younger groups also have the highest usage for customer service, 31% and 44% respectively.

- Regional differences are important for social messaging apps. Although Facebook Messenger is by far the most used for customer service overall, WhatsApp is very prominent in the UK (surpassing Facebook in general use). Apple Business Chat has high usage in the US. Viber is prominent in Australia for general use but not highly used there for customer service. Instagram is prominent in Canada.



42% agree that private social messaging apps make it make it faster to get issues resolved for customer service (down 4 points from 2019). About the same portion of consumers agree that social messaging makes it easier.

Private Social Messaging Apps Used For Customer Service



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Regional Findings

Consumer Experience: US Trends

Channel	% Usage[2]		% Satisfaction (9/10)		% Preference (Top 3 rank)		Net Promoter Score® (NPS®)		First Contact Resolution (FCR)	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Phone	52%	49%	55%	48%	$\boxed{65\%}$	58%	9	8	$\boxed{72\%}$	64%
Email	32%	35%	43%	36%	43%	45%	17	9	57%	58%
Online chat	30%	32%	50%	47%	51%	50%	17	36	68%	75%
Mobile app	$\boxed{22\%}$	12%	39%	38%	17%	18%	-2	14	71%	70%
IVR	19%	18%	$\boxed{39\%}$	24%	22%	19%	5	-20	$\boxed{68\%}$	55%
Automated assistant / chatbot	12%	10%	$\boxed{38\%}$	20%	11%	13%	0	-14	$\boxed{72\%}$	40%
Text	13%	13%	$\boxed{55\%}$	30%	12%	12%	38	0	$\boxed{66\%}$	50%
Website	10%	$\boxed{26\%}$	33%	38%	44%	44%	-2	4	47%	$\boxed{59\%}$
Home electronic assistant[1]	5%	5%	40%	$\boxed{69\%}$	3%	4%	-2	54	36%	$\boxed{85\%}$
Private social messaging app	9%	10%	$\boxed{69\%}$	42%	7%	7%	63	37	$\boxed{81\%}$	68%
Public social media	9%	9%	36%	41%	6%	8%	0	55	44%	$\boxed{59\%}$
Conversational AI IVR	4%	13%	$\boxed{63\%}$	34%	12%	17%	50	-2	37%	$\boxed{52\%}$
Video chat[1]	6%	9%	28%	31%	8%	6%	18	0	$\boxed{61\%}$	38%

Agent-assisted in blue, Self-service in pink. Box around number indicates it statistically significantly higher or lower from previous year.

[1] Note small sample sizes for home electronic assistant, video chat

[2] Customer service interactions in the last 3 months

Consumer Experience: UK Trends

Channel	% Usage[2]		% Satisfaction (9/10)		% Preference (Top 3 rank)		Net Promoter Score® (NPS®)		First Contact Resolution (FCR)	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Phone	46%	39%	48%	46%	63%	59%	17	10	76%	75%
Email	32%	44%	36%	26%	55%	62%	2	16	51%	50%
Online chat	27%	35%	51%	39%	61%	56%	31	7	75%	68%
Mobile app	22%	9%	40%	32%	18%	14%	6	0	59%	63%
IVR	15%	9%	22%	18%	14%	13%	-28	-31	49%	47%
Automated assistant / chatbot	14%	8%	25%	10%	11%	15%	-6	-28	69%	40%
Text	10%	6%	34%	23%	9%	8%	4	0	52%	50%
Website	5%	26%	26%	39%	43%	43%	-5	-1	42%	58%
Home electronic assistant[1]	6%	2%	32%	9%	2%	3%	-9	-27	60%	27%
Private social messaging app	6%	8%	48%	35%	8%	8%	20	8	64%	50%
Public social media	6%	6%	12%	33%	6%	5%	-8	0	40%	56%
Conversational AI IVR	2%	7%	11%	13%	6%	8%	-17	-44	39%	52%
Video chat[1]	2%	4%	40%	25%	5%	5%	-30	25	60%	75%

Agent-assisted in blue, Self-service in pink. Box around number indicates it statistically significantly higher or lower from previous year.

[1] Note small sample sizes for home electronic assistant, video chat

[2] Customer service interactions in the last 3 months

Consumer Experience: Australia Trends

Channel	% Usage[2]		% Satisfaction (9/10)		% Preference (Top 3 rank)		Net Promoter Score® (NPS®)		First Contact Resolution (FCR)	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Phone	45%	45%	41%	48%	67%	63%	14	23	67%	70%
Email	32%	40%	42%	29%	55%	55%	6	-1	57%	53%
Online chat	26%	30%	42%	38%	52%	48%	9	0	63%	63%
Mobile app	22%	14%	39%	41%	19%	15%	-5	15	64%	70%
IVR	15%	14%	17%	15%	18%	17%	-47	-34	43%	51%
Automated assistant / chatbot	14%	8%	29%	19%	10%	13%	-6	-28	71%	44%
Text	8%	10%	30%	21%	10%	11%	14	0	56%	63%
Website	5%	26%	30%	27%	46%	45%	-21	-22	45%	55%
Home electronic assistant[1]	8%	3%	23%	36%	1%	2%	-25	64	52%	45%
Private social messaging app	4%	8%	32%	27%	8%	9%	-4	18	60%	73%
Public social media	4%	7%	24%	18%	4%	7%	-16	0	60%	45%
Conversational AI IVR	1%	12%	20%	15%	6%	10%	-60	-30	40%	33%
Video chat[1]	1%	7%	80%	22%	4%	6%	40	-22	80%	33%

Agent-assisted in blue, Self-service in pink. Box around number indicates it statistically significantly higher or lower from previous year.

[1] Note small sample sizes for home electronic assistant, video chat

[2] Customer service interactions in the last 3 months

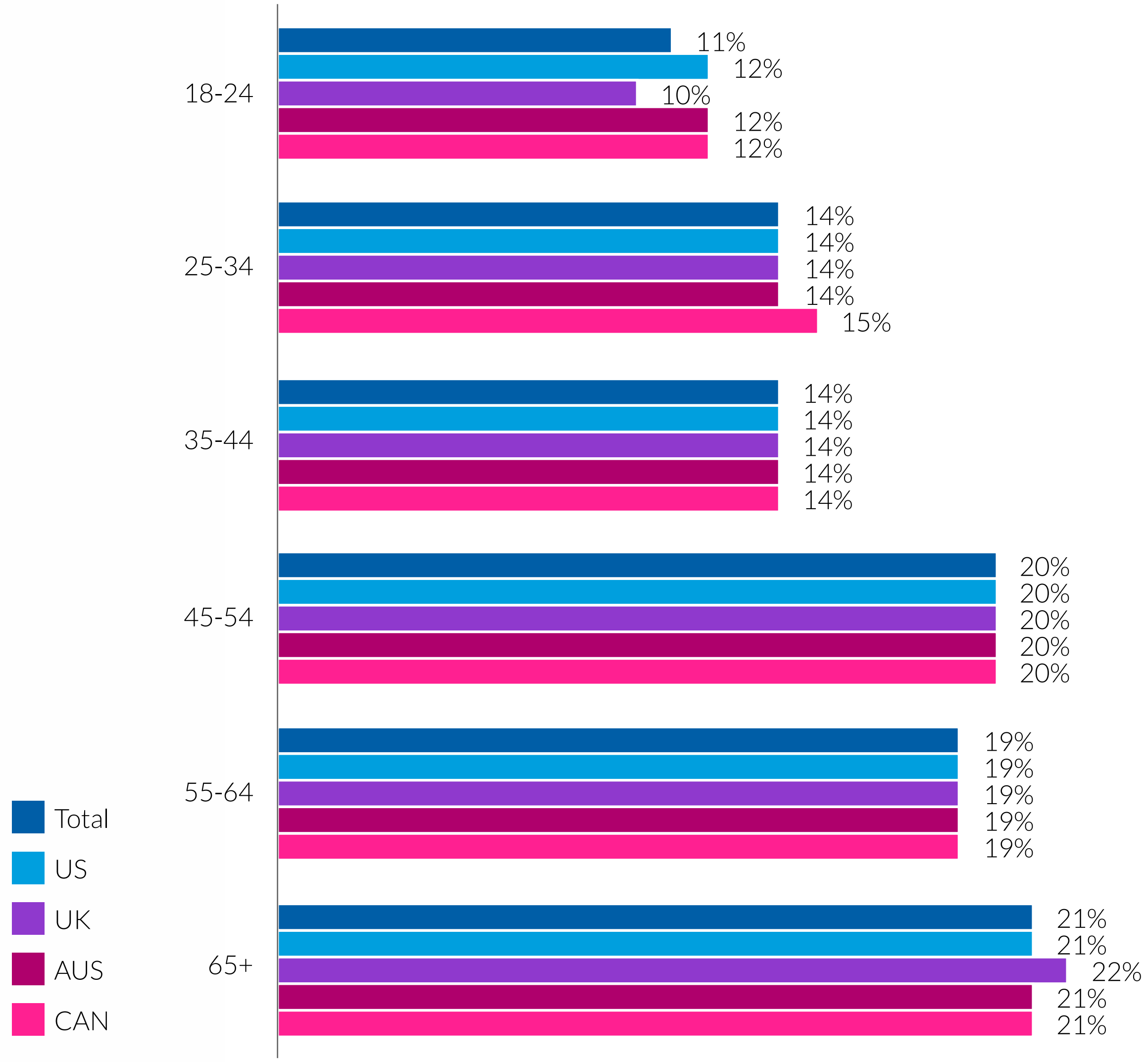
Consumer Experience: Canada Findings

Channel	% Usage[2]	% Satisfaction (9/10)	% Preference (Top 3 rank)	Net Promoter Score® (NPS®)	First Contact Resolution (FCR)
	2020	2020	2020	2020	2020
Phone	52%	33%	68%	2	78%
Email	38%	30%	54%	-7	54%
Online chat	29%	39%	51%	9	67%
Mobile app	11%	44%	15%	7	60%
IVR	15%	22%	19%	-23	53%
Automated assistant / chatbot	8%	17%	10%	-43	30%
Text	5%	13%	7%	-38	50%
Website	27%	38%	47%	-2	67%
Home electronic assistant[1]	3%	36%	4%	14	86%
Private social messaging app	8%	25%	8%	13	75%
Public social media	7%	33%	6%	11	56%
Conversational AI IVR	10%	16%	10%	-64	36%
Video chat[1]	7%	22%	6%	44	67%

Agent-assisted in blue, Self-service in pink.
[1] Note small sample sizes for home electronic assistant, video chat
[2] Customer service interactions in the last 3 months

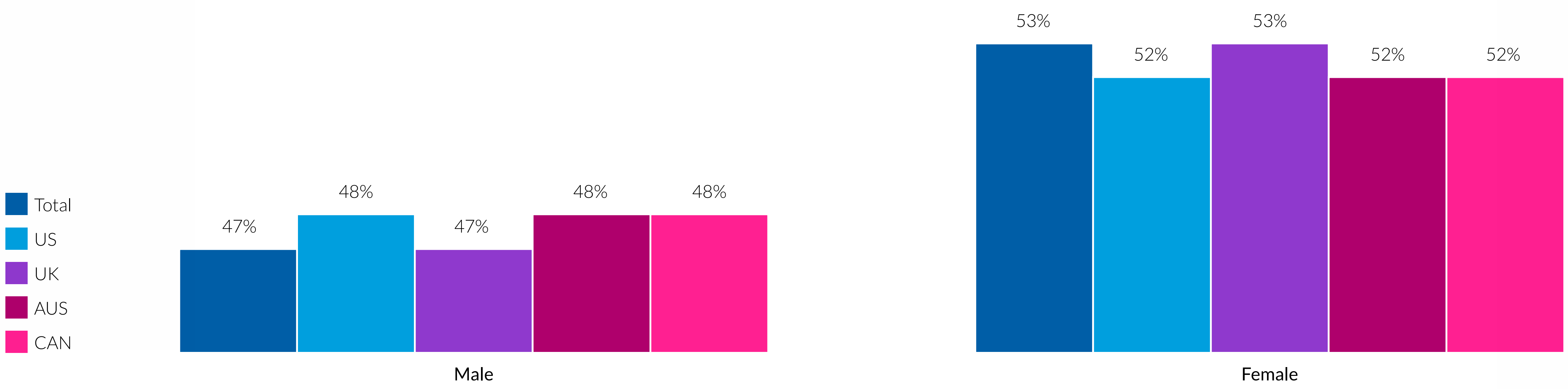
Demographics

Age



Generations					
	Total	US	UK	AUS	CAN
Generation Z: Born 1997-2012, Age 18-23	10%	11%	9%	9%	11%
Millennials: Born 1981-1996, Age 24-39	22%	21%	22%	21%	24%
Generation X: Born 1965-1980, Age 40-55	29%	29%	29%	30%	27%
Baby Boomers: Born 1946-1964, Age 56-74	34%	33%	34%	35%	34%
Silent Generation: Born 1928-1945, Age 75+	5%	6%	5%	4%	5%

Gender



Education

US	
Less than high school	4%
High school graduate	36%
Some college	27%
College graduate	21%
Post-graduate education	12%

UK	
Incomplete Secondary (high school) Education	4%
Incomplete Secondary Education	4%
Secondary Education Completed	23%
Some University or Vocational Certification	16%
Some University or Vocational Certification (TAFE Certificate I, II,III or IV)	5%
Vocational or Professional Certification Completed	8%
Vocational or Professional Certification Completed (TAFE Diploma or Advanced Diploma)	9%
University Education Completed	15%
Postgraduate Education Completed	10%
Doctorate, Post-doctorate or equivalent Completed	6%

AUSTRALIA	
Incomplete secondary (high school) education	12%
Incomplete secondary education	11%
Secondary Education completed	13%
Some university or vocational certification	11%
Some university or vocational certificate (TAFE Certificate I, II, III or IV)	15%
Vocational or professional certification completed	7%
Vocational or Professional Certification Completed (TAFE Diploma or Advanced Diploma)	9%
University Education Completed	10%
Postgraduate Education Completed	8%
Doctorate, Post-doctorate or equivalent Completed	5%

CANADA	
Junior or Middle School	2%
High School Diploma, Secondary School	14%
Some High School, Secondary School	7%
Some College, University, Technical School or Further Education	33%
Undergraduate, University Degree	29%
Some Postgraduate	6%
Graduate/Post Graduate Degree	10%

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Why NICE inContact?

NICE inContact works with organizations of all sizes to create extraordinary and trustworthy customer experiences that build deeper brand loyalty and relationships that last. With NICE inContact CXone™, the industry's most complete cloud customer experience platform, we enable an exceptional agent and customer experience—every time and on every channel.

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More Resources

2020 Customer Experience (CX) Transformation Benchmark: Survey of Global Businesses eBook

2019 Customer Experience (CX) Transformation Benchmark, Global Consumers eBook

2019 Customer Experience (CX) Transformation Benchmark, Global Findings: Business vs. Consumer eBook

2019 Customer Experience (CX) Transformation Benchmark, Contact Center Plans and Metrics eBook

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