



2016 ASPECT CONSUMER EXPERIENCE INDEX

October 26, 2016

A national study of 1,000 American consumers to investigate the attitudes, preferences and behaviors regarding customer touchpoints and engagement within the specific context of self-service, customized or personalized service and the hot topics of messaging, “intelligent assist” and “chatbots”.



Survey Methodology

- A custom-crafted online study with a minimum aggregate sample size of 1000 Americans, aged 18-65, regionally representative and divided by gender as per most recent census projections (with ~25% oversampling of those aged 18-34)
- Survey fielded online to match the behavior and expectations of this population
- Sample screened to not be non-users, of Customer Engagement Experience (CEM) in past year
- Confidence interval of +/- 3.1, 19 times out of 20
- Survey content designed in collaboration by Conversion Research and Aspect Software



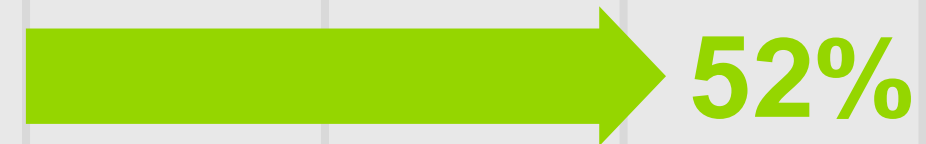
Consumers Remain Feeling Underwhelmed by Customer Service

We've asked the same tracking questions to consumers in both 2015 and 2016 to gauge how their attitudes and preferences about customer service have changed over the past 12 months. Many of the issues they have with customer service have not gotten better.

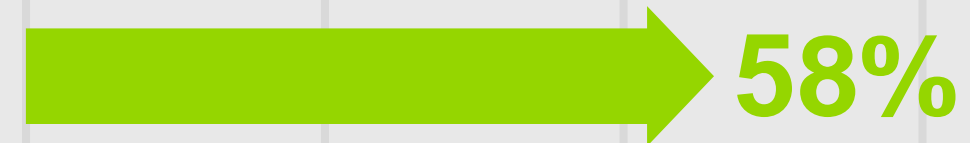


Consumers who have expressed feelings of being underappreciated by the companies they do business with.

2015

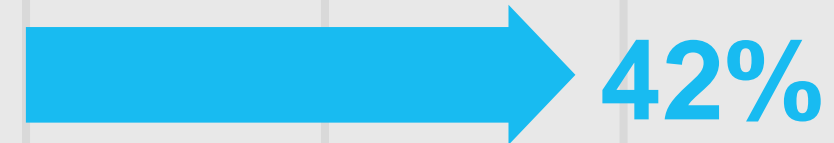


2016



Would you rather clean a toilet or contact customer service?

2015



2016



Percent of consumers who have stopped doing business with at least one company in the last year because of poor customer service.

2015



2016

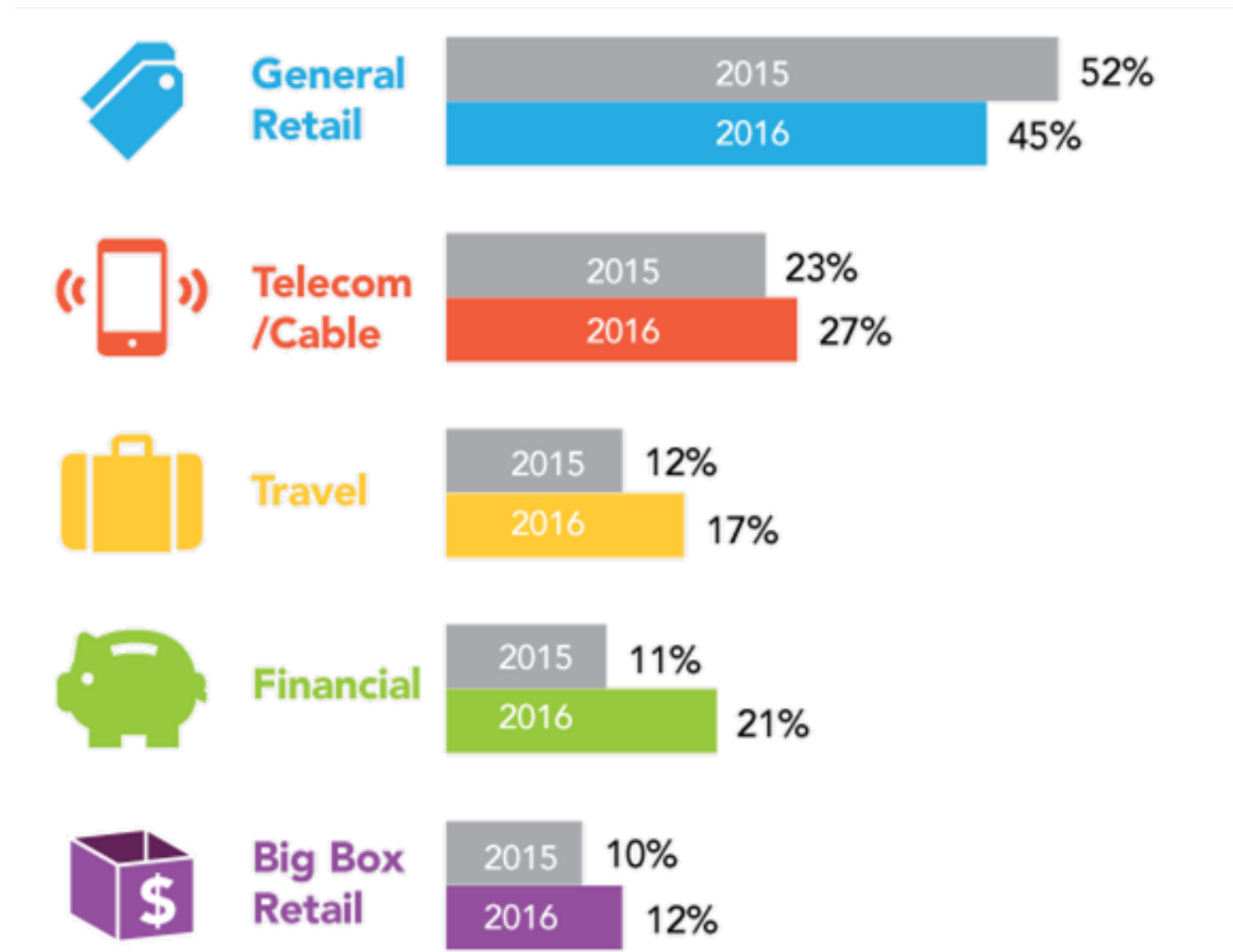




What industry (or industries) were the companies involved in that you stopped doing business with because of poor customer service?



GENERAL RETAIL was the only tracked industry which saw a decrease lost business due to poor customer service from the 2015 survey. Travel, Telecom/Cable and Big Box Retail saw small to sizable increases in lost business while the Financial industry saw the number of customers who left banking institutions nearly double because of unacceptable service.



n = 505

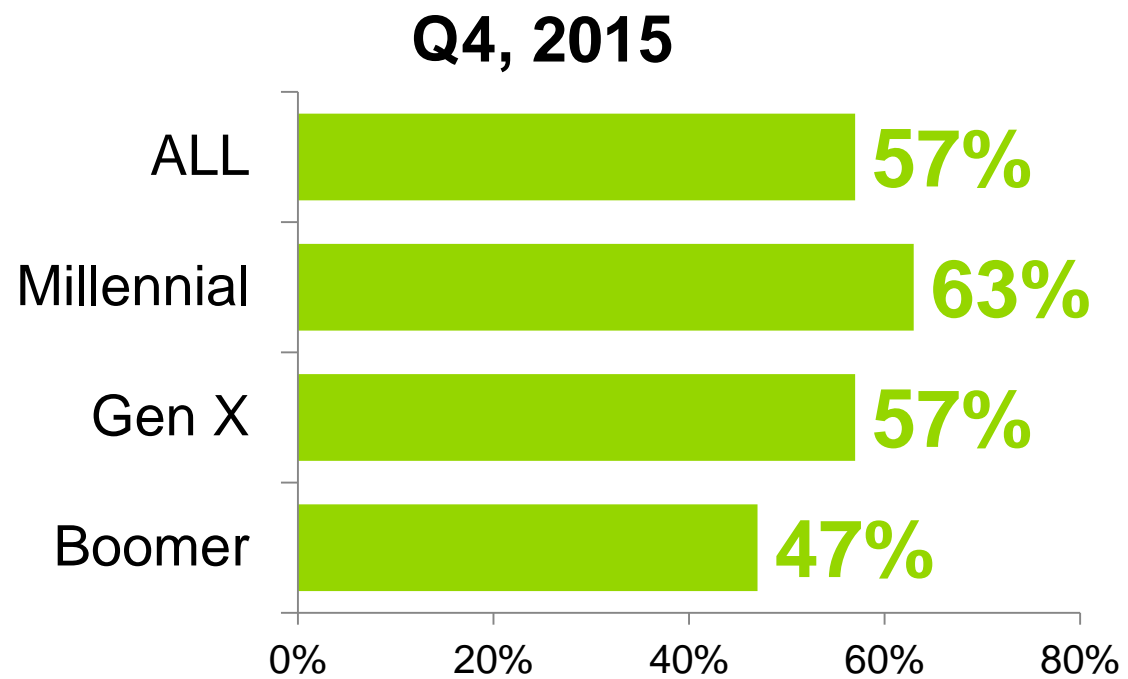


General Retail is the Most Susceptible to Bad Service Turning into Lost Business

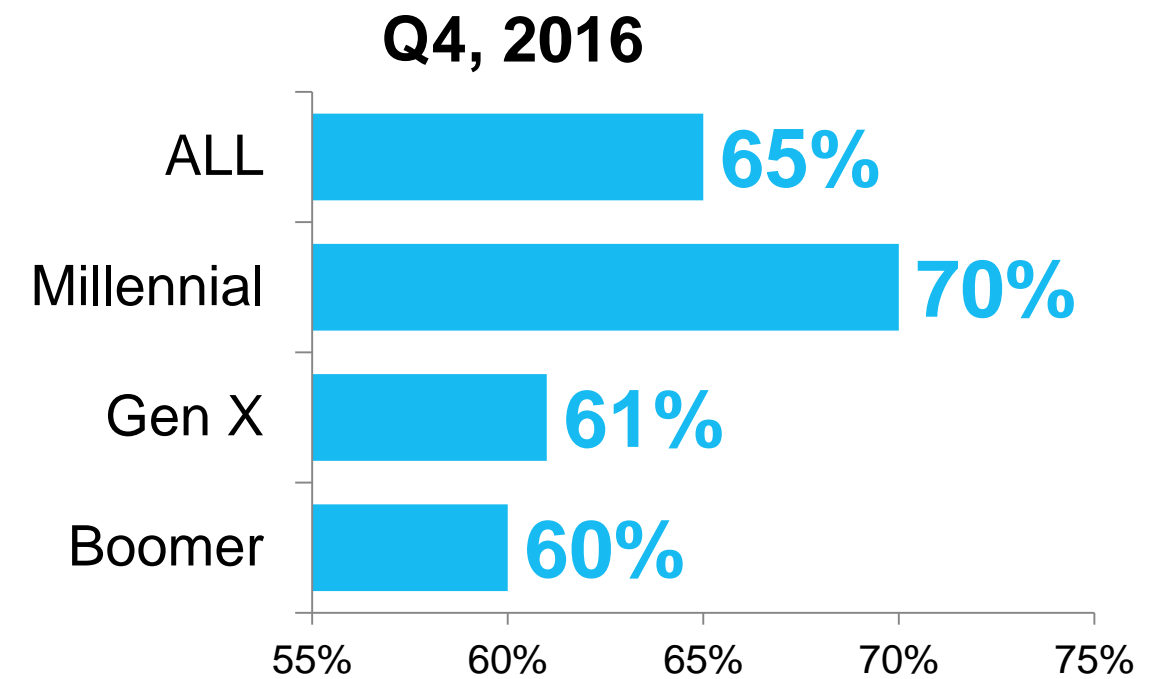
Two-thirds of Consumers Feel Good When They Can Handle a Customer Service Issue Without Having to Talk to a Person



I feel really good about both the company and myself when I am able to answer a question or solve a problem related to that company without having to talk with a customer service agent.



n = 1019



n = 1000

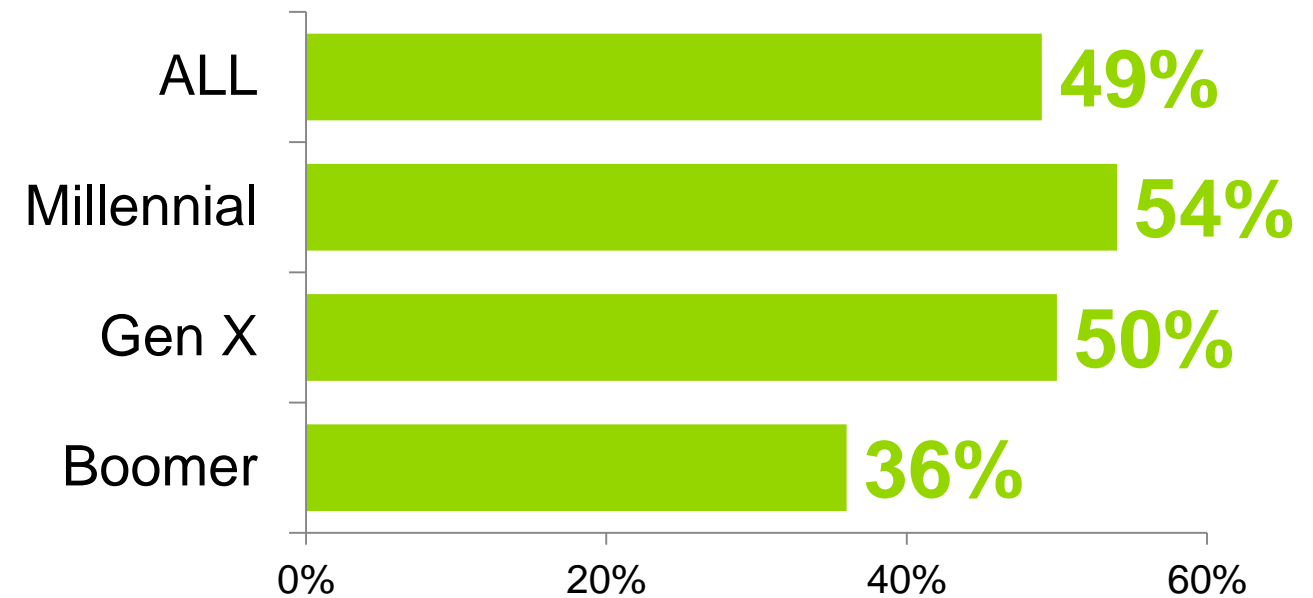


Consumers showing greater emotion about the self-service experience. Millennials showed the highest increase jumping 12% from 2015 with millennial males jumping 18%.

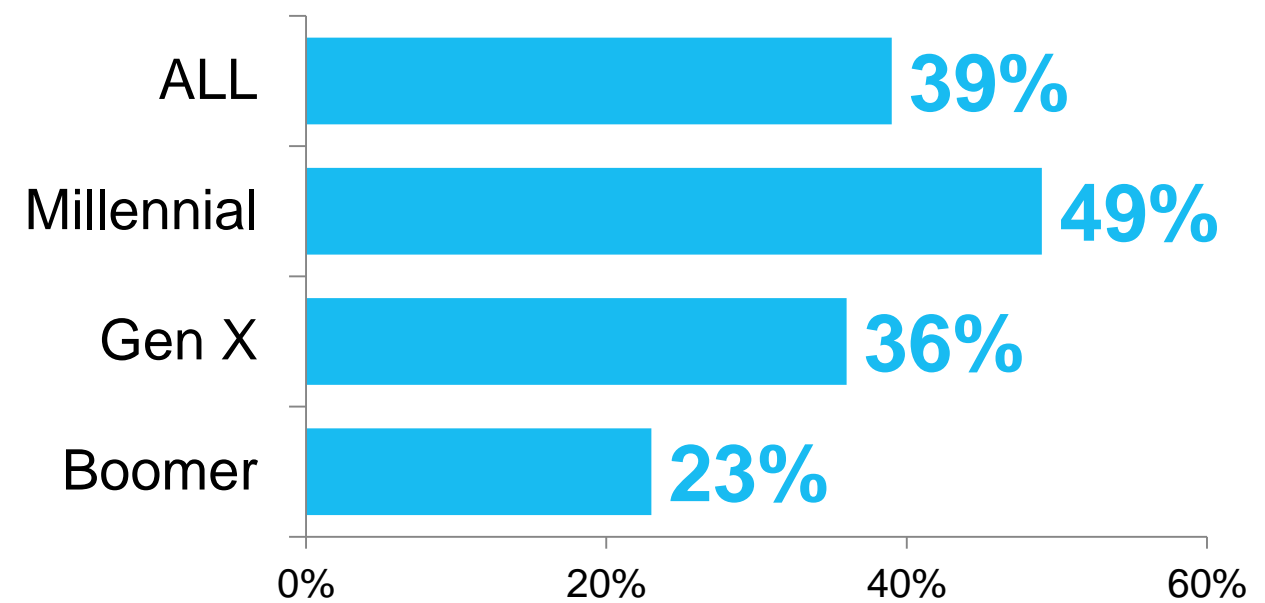
Text and Messaging Preferences Continue to Grow



If a company could get it right, I would rather conduct all my customer service interactions via text/chat/messaging.

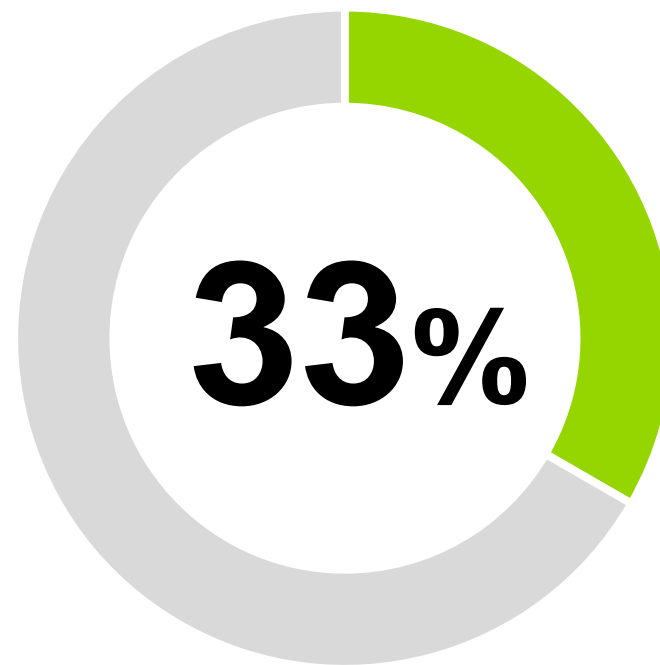


Texting is a more effective communication option for me than talking when engaging with a company.

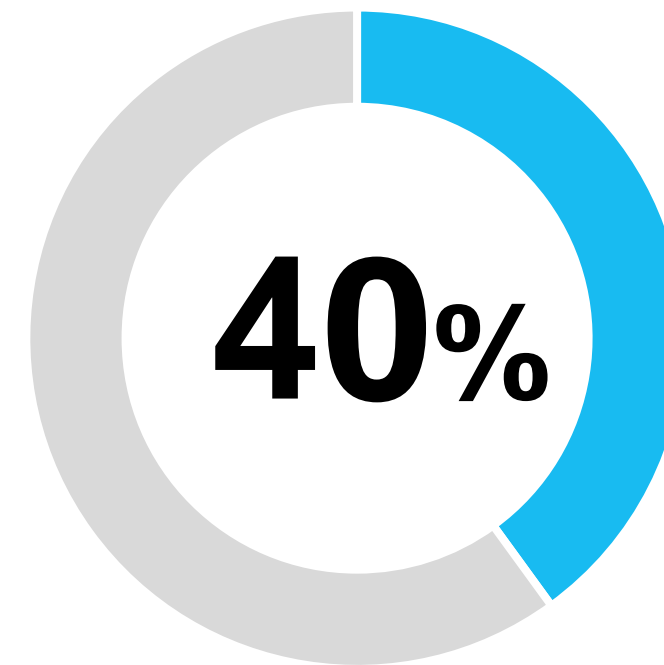




Assuming the quality of the experience and privacy is assured, I really like the idea of customer service using Messaging Apps (like Facebook Messenger, WhatsApp, Snapchat, etc).



2015



2016



**Consumer Openness to
Messaging Apps for Customer
Service Continues to Grow**

Automated and Self-Service Preferences by the Numbers



61%

Say chatbots in customer service are here to stay.



69%

Of consumers say they interact with an intelligent assistant or chatbot at least once a month.



71%

Of consumers want the ability to solve most customer service issues on their own.*

* Up from 64% in 2015

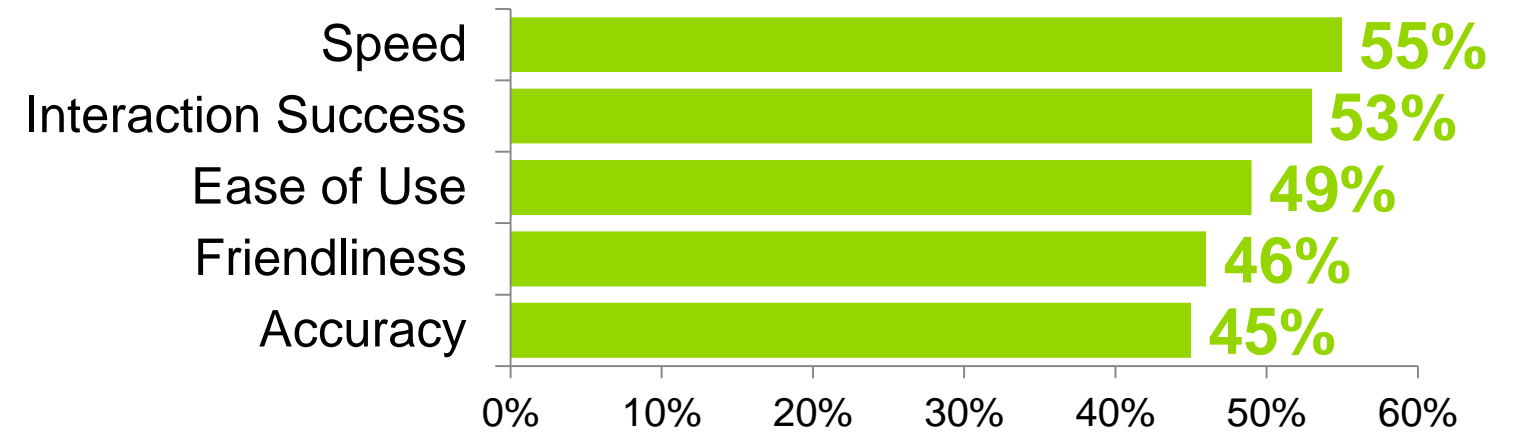


But the real mover is messaging, automated interaction to be specific. The interest and demand for automated and self-service experiences continues to rise.

Consumers Have Reservations



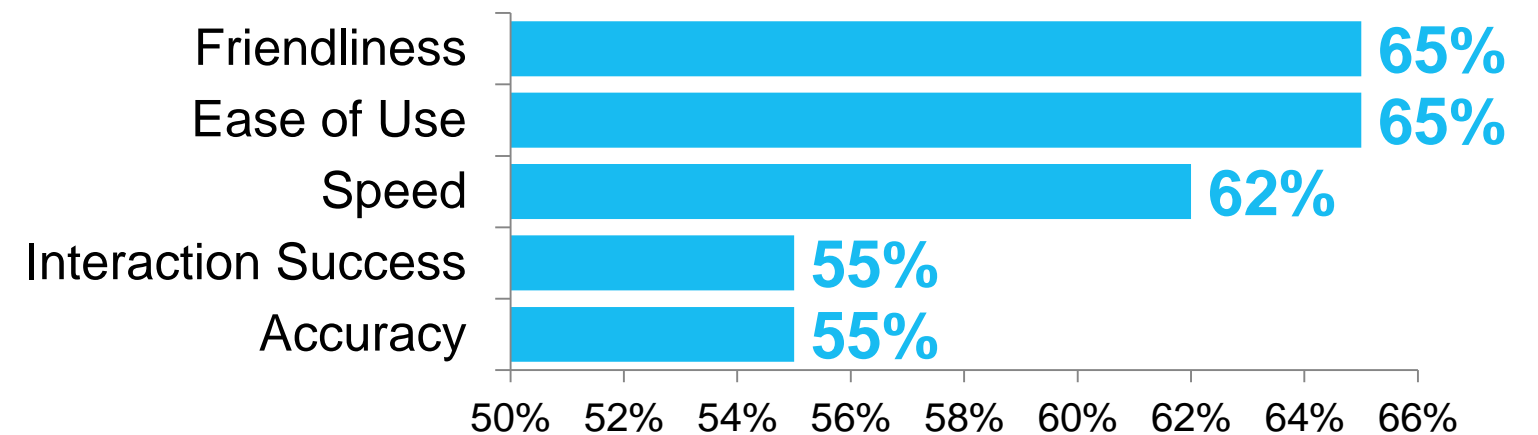
How do you expect customer service using “intelligent assistant” or “chatbot” technology will perform in terms of...



n = 280 Respondents who don't believe they have interacted with a chatbot or automated assistant.



How would you rate your experiences with “intelligent assistant” or “chatbot” technology?



n = 720 Respondents who have interacted with a chatbot or automated assistant.

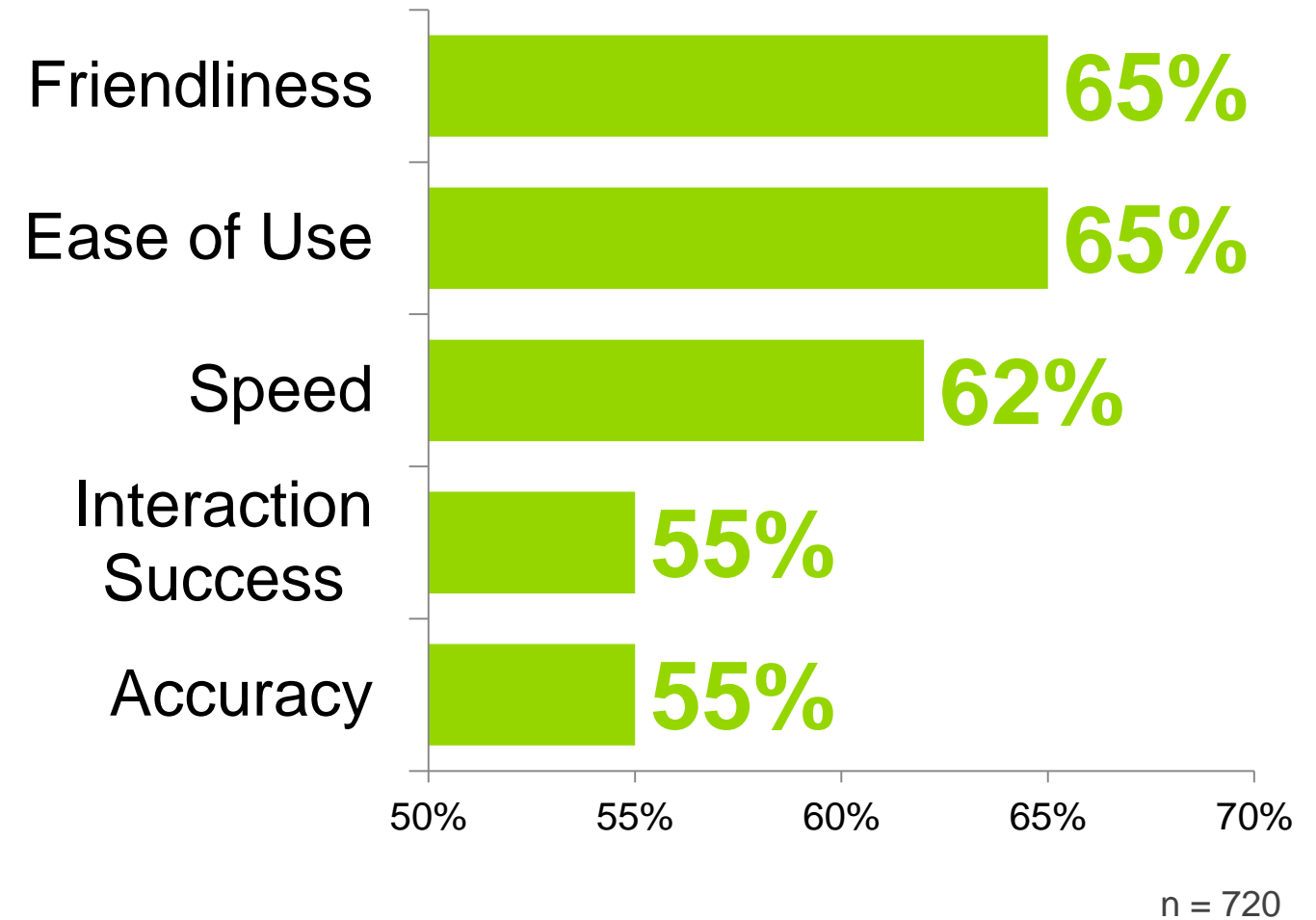


Consumers who have not used chatbots have reservations about the experience as a whole. Those who have had interaction with a chatbot or automated assistant rank the user experience higher while the transaction/interaction success does not improve upon tepid exceptions.

Consumers in General, Rate the User Experience Higher than the Effectiveness of the Chatbot Interaction



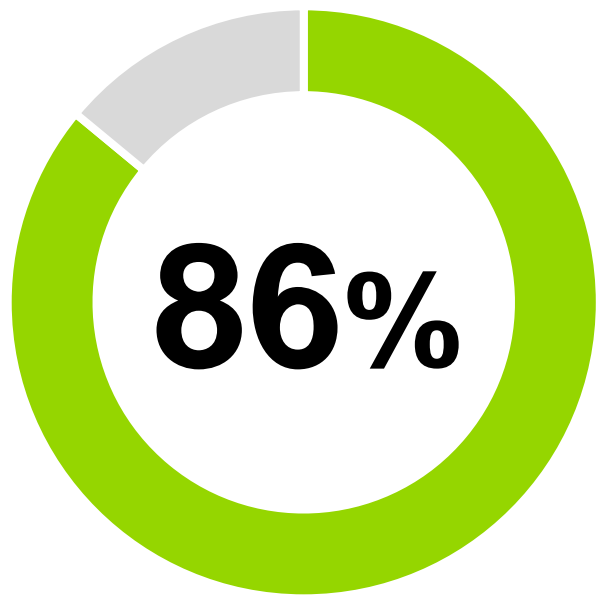
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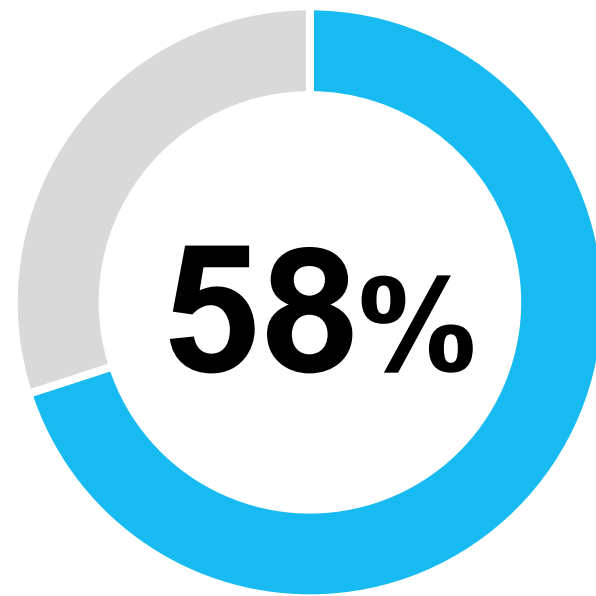
Key Consumer Attitudes About Automated Interaction in Customer Service



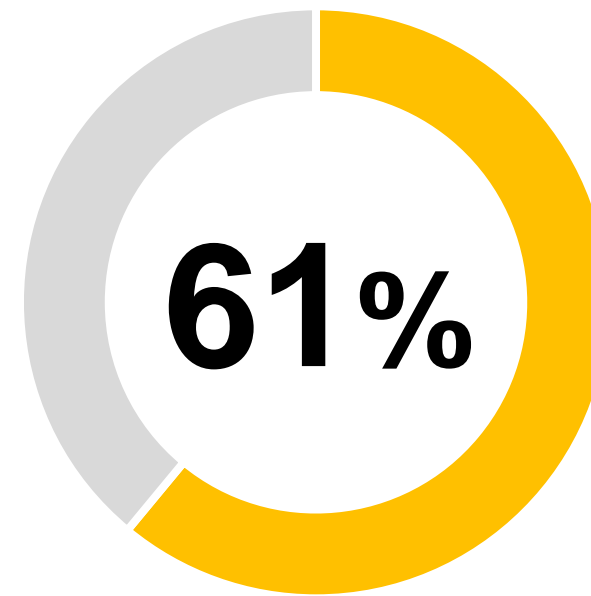
Customer service that uses “intelligent assistant” or “chatbot” technology...



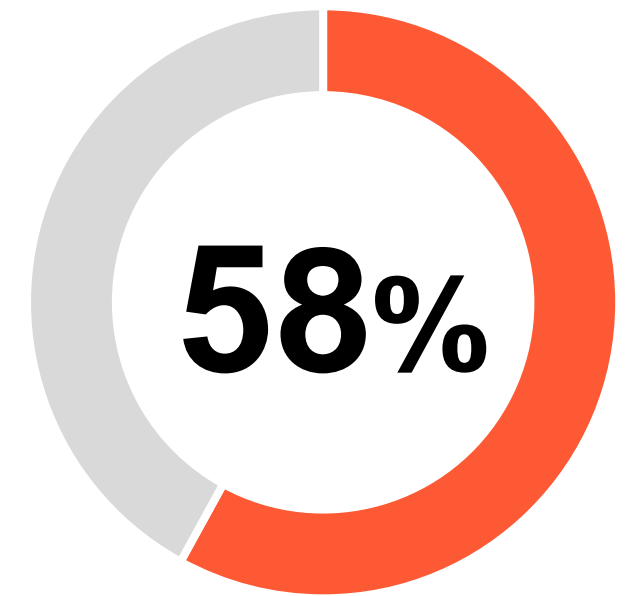
Should always have an option to transfer to a live agent



Is best for simple to moderate requests



Will allow for simple to moderate requests to be handled more quickly

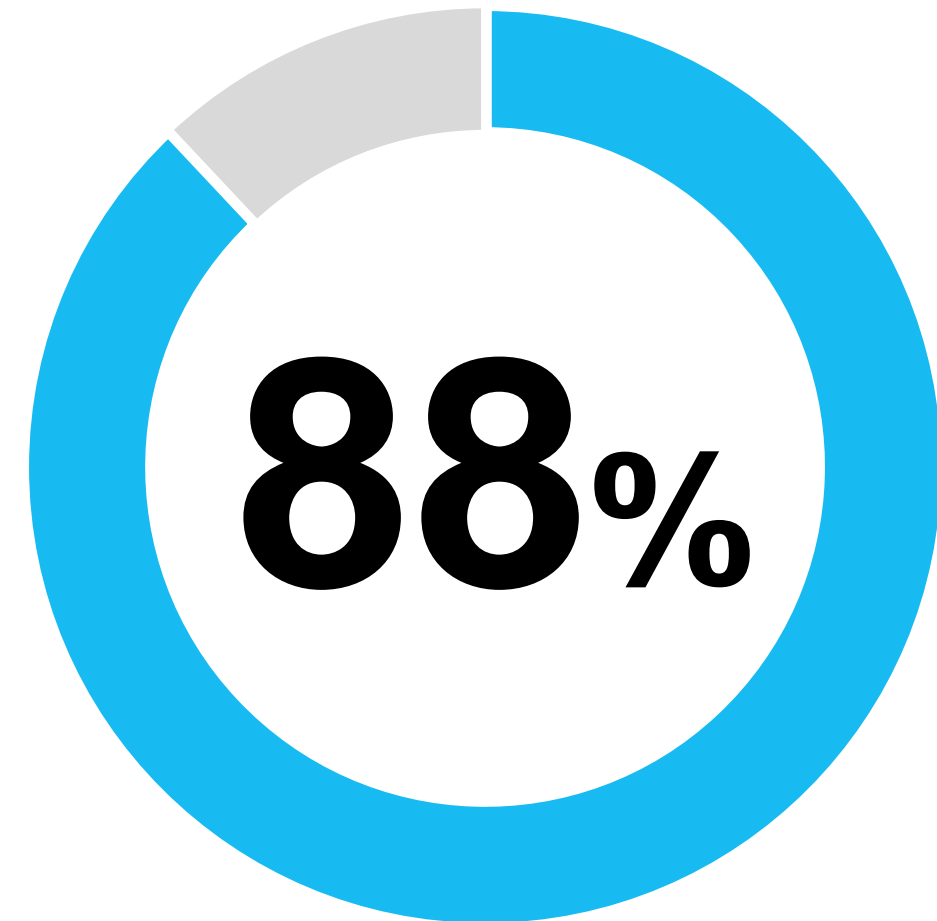


Will allow for simple to moderate requests to be handled faster and more accurately

Key Consumer Attitudes About Automated Interaction in Customer Service



When purchasing a product, ordering a service or contacting customer service I expect a natural transition between automated self-service and agent-assisted service that keeps the context of my interaction so I don't have to repeat myself.

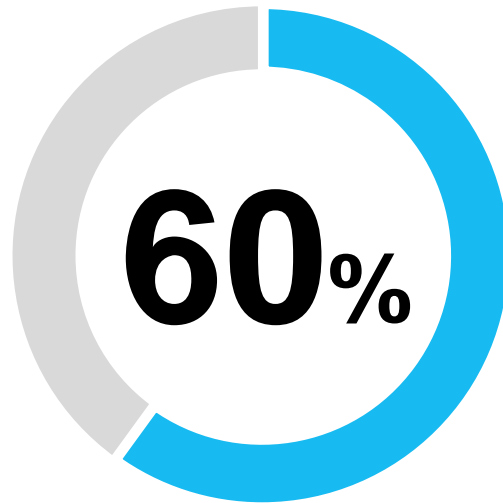


Live agent interaction is not going away but the role should evolve to that of subject matter expert

Key Reservations About Automated Interaction in Customer Service



Customer service that uses “intelligent assistant” or “chatbot” technology...



say it will make the companies that use them feel less human



say it will probably end up providing the same frustration that traditional self-service/IVR options do

* Baby Boomers – 66%

Expected Performance of Automated Interaction | **TOP 10**



How well do you expect “intelligent assistant” or “chatbot” technology will perform when used for each of the following typical customer service tasks?

	TOT.	M	F
Getting basic info about a company, product or service	73%	70%	75%
Confirming a purchase	71%	68%	74%
Seeing if a product is available at a local store	69%	68%	70%
Confirming a booking	68%	66%	70%
Scheduling, changing or tracking a shipment	65%	64%	66%
Requesting service at a hotel	60%	60%	61%
Ordering food for delivery	59%	61%	57%
Booking a ridesharing pickup like Uber or Lyft	58%	58%	58%



Females have slightly higher expectations when using a chatbot for simple to moderate interactions and transactions.

Expected Performance of Automated Interaction | **BOTTOM 10**



How well do you expect “intelligent assistant” or “chatbot” technology will perform when used for each of the following typical customer service tasks?

	TOT.	M	F
Booking something (show, travel, reservation)	52%	54%	50%
Buying something	51%	51%	52%
Getting info from government services	49%	51%	48%
Simple troubleshooting	48%	50%	46%
Changing a booking ▶	40%	45%	35%
Looking for an expert opinion ▶	37%	41%	33%
Changing something in your financial accounts ▶	37%	43%	30%
Changing a purchase	35%	38%	33%
Getting complicated info about a product or service ▶	32%	38%	26%
Solving a complex task or request ▶	32%	35%	28%
Complicated trouble shooting ▶	29%	34%	24%



However females, as a whole, have lower expectations of chatbot performance.

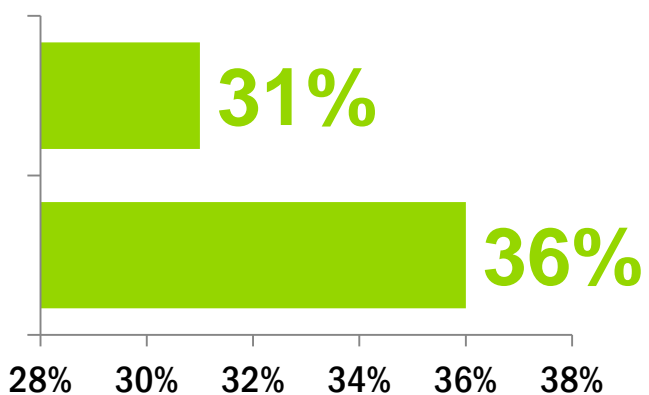
Overall American Consumer Intent to Utilize these New Modalities in the Next Year is Significant



In the next year do you think you will be doing either of the following:

Purchasing or ordering ANYTHING using...

...any type of VIRTUAL ASSISTANT (like Amazon's Alexa or Apple's Siri)?



...any type of MESSAGING platform (like FB Messenger)?

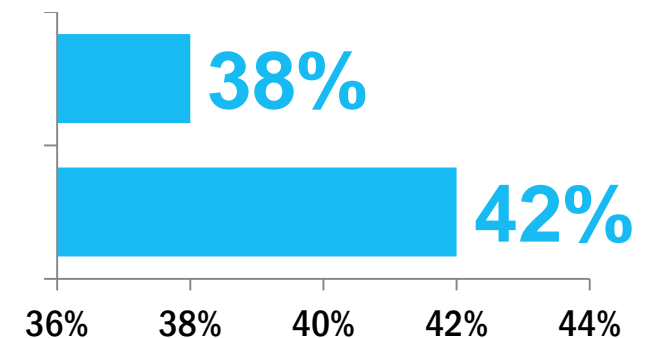
36%

28% 30% 32% 34% 36% 38%

n = 1000

Contacting customer service for ANYTHING using...

...any type of VIRTUAL ASSISTANT (like Amazon's Alexa or Apple's Siri)?



...any type of MESSAGING platform (like FB Messenger)?

42%

36% 38% 40% 42% 44%

n = 1000

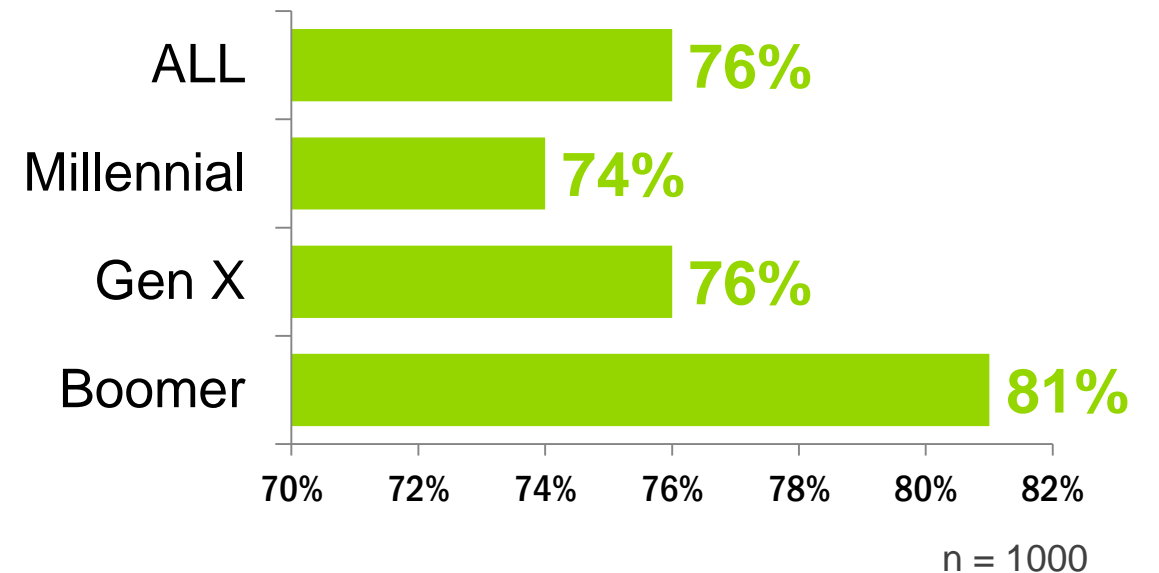


When using chatbots and messaging apps, consumers plan on interacting/transacting with customer service noticeably more than they do making purchases

Context and Interaction History are Must-have Expectations for Customers Engaging with Brands



When purchasing a product, ordering a service or contacting customer service **I expect an automated self-service experience or a live agent to have the context and history of all my previous interactions to be immediately available so it's a more personal experience.**



REGARDLESS of HOW I make contact (e.g. messaging, live chat, phone) **I expect ANY previous interactions to be immediately available in an automated self-service experience OR with a live agent I contact for any type of customer service.**

