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CONSUMER INSIGHTS:

Understanding Consumer Experiences and Opinions

Customer Experience Management Benchmark Series
2018 Consumer Edition

Execs In The Know

copc

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PREFACE

This, the 2018 Consumer Edition of the Customer Experience Management Benchmark (CXMB) Series, marks the sixth year of the series and the twelfth volume. Within these pages, readers will discover new insights into consumer experiences and opinions, including an entirely new section devoted to unassisted solutions, addressing technologies like chatbots and other solutions powered by artificial intelligence (AI). Not only does this new content investigate how consumers feel about these types of solutions, it also sheds light on the current experience, investigating elements like resolution rate and satisfaction. This is rich content for any organization looking to implement a new unassisted solution, or even those looking for ways to improve an existing solution.

In addition to the new content highlighted above, as well as other new questions, this year's report continues to add to the series' ongoing dataset in the areas of consumer experience, opinion and channel-specific results. As with past reports, channel-specific results are grouped together in the following manner: Traditional Care, Interactive Care, Social Media Care and Mobile Care. For the purposes of this report, these channels are defined by the following solution groupings:

Traditional Care: Phone, Email and In-Person

("Alternative" Channels)

Interactive Care: Online/Video Chat, FAQ and Self-Help
Social Media Care: Twitter, Facebook, Forums, etc.
Mobile Care: Apps, Text/SMS and Mobile Chat

Please keep these channel definitions in mind as your review these results.

Some highlights from this year's report:

- Compared to 2017, 2018 saw a general bump in the use of Interactive Care solutions combined with a decline in the use of Social Media Care (page 11).
- The resolution rate of multichannel engagements remains high at 75%, yet satisfaction with the multichannel experience remains low at 57% (page 20).
- 66% of unassisted solution users are okay with being guided to such a solution as long as it resolves their issue, but only 24% of the same think the increased availability of unassisted solutions has improved their overall customer experience (page 28).
- For the second year in a row, there has been no improvement in the percentage of consumers who feel brands are generally meeting their customer care needs and expectations (page 33).
- Perception of Interactive Care (e.g., online chat) as a channel of convenience continues to grow, with 30% of respondents naming it as the most convenient channel of care in 2018, up from 20% in 2015 (page 40).
- Survey respondents continue to favor live assistance over self-help options, regardless of the complexity of the issue (page 44).

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A NOTE FROM THE AUTHORS

It's been our pleasure to produce this year's report, *Consumer Insights: CX — Understanding Consumer Experiences and Opinions*. As with previous editions, this year's report is the product of a special research partnership between Execs In The Know and COPC Inc.

It's our hope that you'll find the content contained in this report to be of great value as you strategize future plans for your customer experience program and implement new solutions to better serve your customers. The goal of the CXMB Series of reports has always been the same: to inform the wider community of customer experience professionals and help an entire industry grow and get better together. We hope we've hit the mark.

We'd like to offer a very special "thank you" to Cecelia Myers, director of Product & UX for Groupon's Global Operations group. Cecelia has kindly provided some wonderful insights into Groupon's recent online support transformations through her commentary, *Encouraging Online Support While Keeping the Agent Accessible*. You'll find her complete commentary on page 6.

As always, we encourage you, our reader, to share this research with your network. Regardless of industry and brand, everyone in the customer care community is working toward one goal: improve the customer experience provided by their respective brand. By sharing this research, you'll propel innovation not only at individual organizations, but across industries.

Kind regards,

Execs In The Know COPC

Please contribute your voice to the 2018 CXMB Series Corporate Edition!

We want to hear your story! Execs In The Know and COPC Inc. are currently gathering responses for the 2018 CXMB Series Corporate Edition report, and we could use your help. Your individual responses will never be shared, and your participation will help broaden this year's insights and results.

For information on how you can participate, please contact Susan McDaniel at Susan@execsintheknow.com.

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Corporate Commentary

ENCOURAGING ONLINE SUPPORT WHILE KEEPING THE AGENT ACCESSIBLE

Cecelia Myers, Director of Product & UX — Global Operations

The Global Operations team at Groupon has spent years developing and optimizing their solutions to provide excellent Customer Support to users via Assisted channels. But as Groupon Customers become more savvy, and as they demand more convenience, our leadership recognized the critical need for fantastic Online Support. This is a delicate balance for any Product & Tech team: you want to familiarize the User with what they can do online, while ensuring that the Agent is not hidden from them via complex and unwieldy flows. We were challenged by Groupon's leadership to overhaul our Online Support in 2018, driving increased usage while making simultaneous improvements in satisfaction. Not only did we deliver a vastly improved experience by our objective support-adoption and satisfaction metrics, but we added millions in savings directly to Groupon's margin by increasing our user's Online Support 30% year-over-year. The team's approach to this had two facets.

User-Centric Design

Global Ops has a distinct advantage to any Product Design problem: millions of Customer Support tickets, adding up to insightful quantitative data and qualitative stories for any user pain point. We started with this, but we layered on a couple strategies to keep our Online Support experience overhaul on track:

User Research: Many Online Support experiences are designed by a few people who understand the type of problem the User is having, and come up with the solution they think is best. It's critical to keep this in mind: your view on what is "best" doesn't matter. You must rapidly prototype and consult the User to understand their feedback, so you can iterate your Product in cycles. We started with drawings on paper, and then evolved our experience design in higher-fidelity solutions with multiple stages of confirmation research. This may sound slow, but it's not—it's far more wasteful to create a Product that doesn't work.

Core Metrics: All the data Customers give us is great, but it can lead a team down a rabbit hole that degenerates into unfocused results. We assigned focus on three "north star" metrics to keep our results and output focused: Online Support Usage ("Deflection"), Satisfaction (CSAT), and Overall Contact Volume. Deflection and CSAT acted as a counterbalance to ensure we drove satisfaction in our online solution, while Contact Volume helped validate that the increase in online support drove real, business-impacting results.

Following these principles helped us balance encouraging Users to solve problems online, while also making it easy to contact an Agent when they truly needed to.

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ENCOURAGING ONLINE SUPPORT WHILE KEEPING THE AGENT ACCESSIBLE, cont.

Cecelia Myers, Director of Product & UX — Global Operations

GROUPON

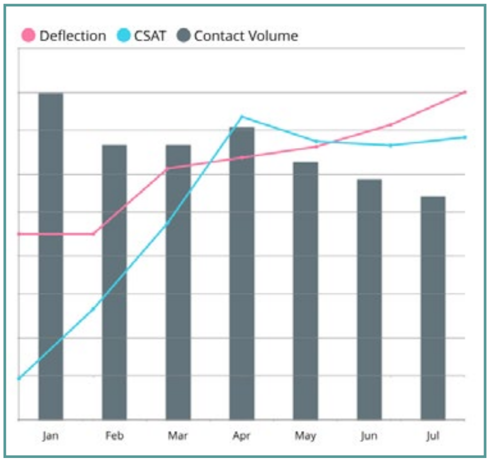
Future-Focused Investment: AI & Automation

We found ourselves overhauling our online experience this year because we let our existing Help product linger for three years with no serious improvements or modifications. In the tech world, this is like millenia. As we embarked on our journey in 2018, we looked to future tech and features that users may be using after we deployed our changes. We carved some of our team off to spend time developing this technology, even though that meant they were creating products that were competitive with our in-flight work. If you don't replace yourself, someone else will; it's better to "jump the s-curve" proactively. In 2019, you may see a couple of products in experiment on our site resulting from our AI and Automation investment this year.

One example is our Groupon Chatbot. It is actually live on our site now, but still in incubation. Chatbots are a buzzword, and it's easy for companies to assume they can rapidly handle customer issues. In reality, they take time to develop and train, so it's best to start with smaller user-cases so you learn how to build them effectively. Our Bot helps troubleshoot login issues for Customers. We've driven her confusion rate down from almost 50% to the single digits through refinements in the UI and user flow.

Results

What really matters is how these changes positively impacted the Groupon customer, and our bottom line. We've seen Global CSAT improvements of over 15% this year so far, while Online Support, or Deflection, has improved 30%. Correspondingly, our ticket volume is actually dropping. The impact of the improved Online Support experience for 2018 will be equal to removing the ticket volume of our two busiest months from our operational costs. This savings helps us reinvest in future-thinking technologies, and in higher-value activities for our Agents.



Cecelia Myers is Director of Product & UX for Groupon's Global Operations group. She works out of Groupon's Chicago corporate headquarters to build the strongest possible Customer and Merchant experiences, focusing on Global Online Support, Agent tools and Deal Creation capabilities. Her team leads Groupon's efforts to empower the Customer, Agent or Merchant to better solve their issue with online Products or Tools. They are passionate about building solutions that work, putting user feedback at the center of the entire Product Development process. This team has proven again and again that user simplicity and satisfaction will ultimately delivery the business's desired impact on revenue. She holds a MS in Product Design & Development from Northwestern's McCormick School of Engineering. Prior to her time at Groupon, she was a Founder-in-Residence at Venture Capital foundry, where she eventually co-founded and launched an online company focused on women's e-commerce.

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SURVEY RESULTS

Consumer Experience

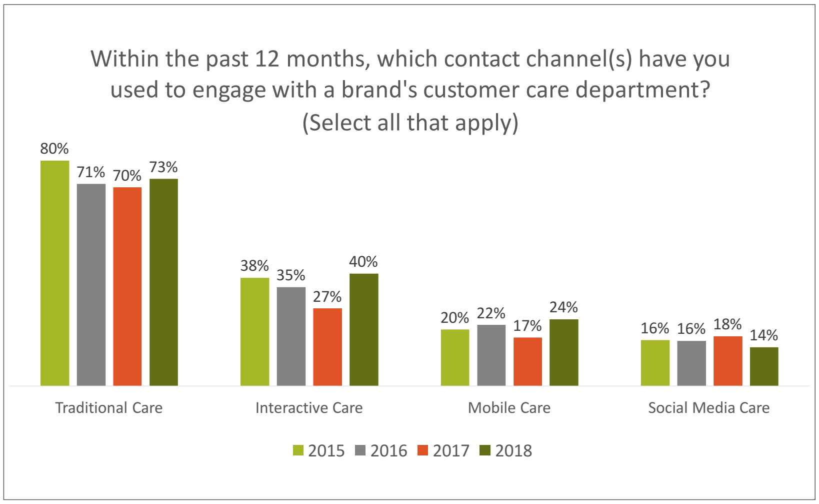
- Consumer Use
- The Multichannel Journey
- The Unhappy Consumer
- Unassisted Channels

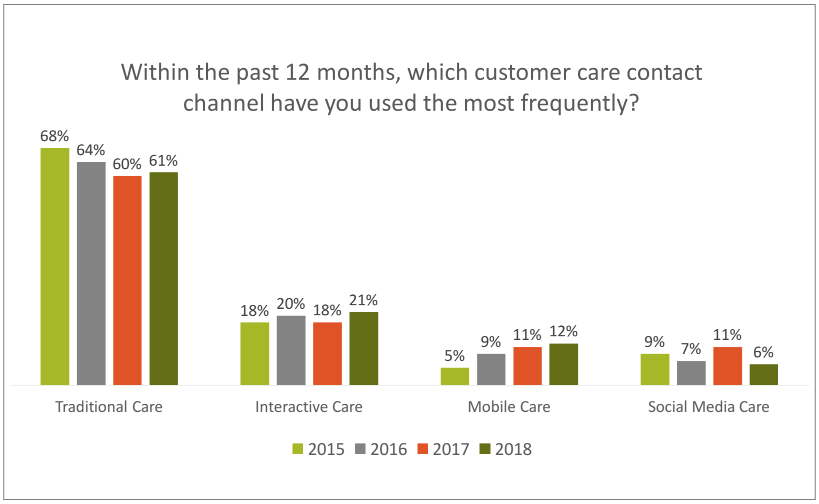
Consumer Use

CHANNEL AND SOLUTION USE

Consumer Experience — Consumer Use

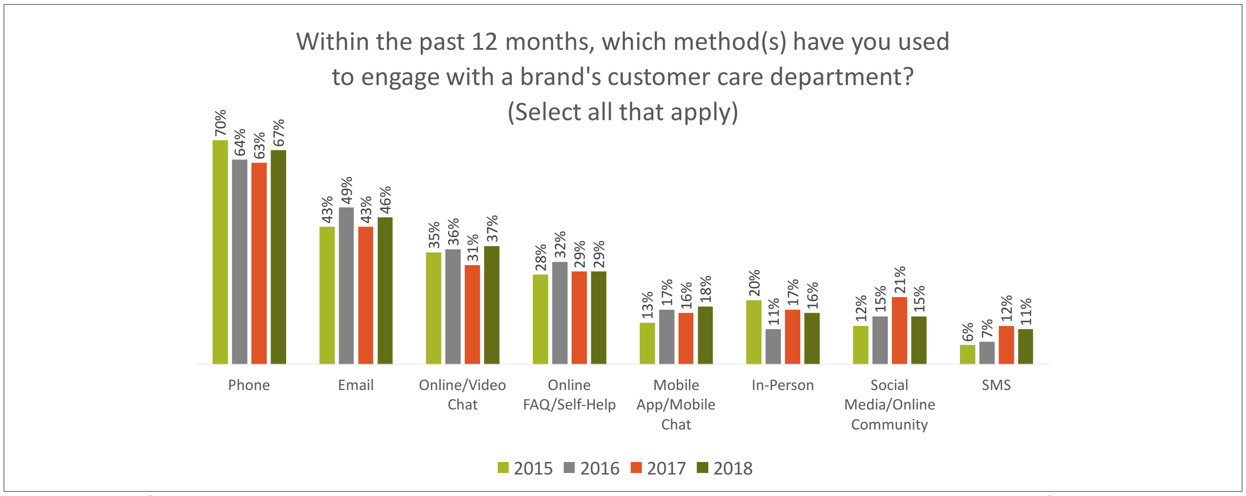
After two straight years of flagging Interactive Care use, 2018 saw a strong rebound, with 40% of survey respondents indicating they had used Interactive Care on at least one occasion in the previous 12 months. This 13-point increase represents a 48% bump in use over 2017. Also of note is the sharp rise in Mobile Care use, up seven points (representing a 41% increase). There was also a falloff in Social Media Care use, down four points — a decline of 22%. Compared to results from previous years, 2018 results displayed broad channel use among consumers.





When asked which channel they used most frequently, consumers responded similarly to 2017, with the exception of Social Media Care. As also reflected in the falloff of overall use (above), far fewer consumers named Social Media Care as a channel most used. In 2018, only six percent of respondents named Social Media Care as the channel they used most frequently, nearly halving results from 2017. This is likely the result of privacy issues which struck the industry in mid-2018.

Turning to the use of specific solutions, the decline in the use of Social Media Care was reflected yet again, with a six-point year-over-year drop, representing a fall of 29%. Outside of Social Media Care, individual solution use was either up or flat across the board, with the largest increase in use occurring with Online/Video Chat. Use of this particular solution increased by six points year-over-year, an increase of 19%.



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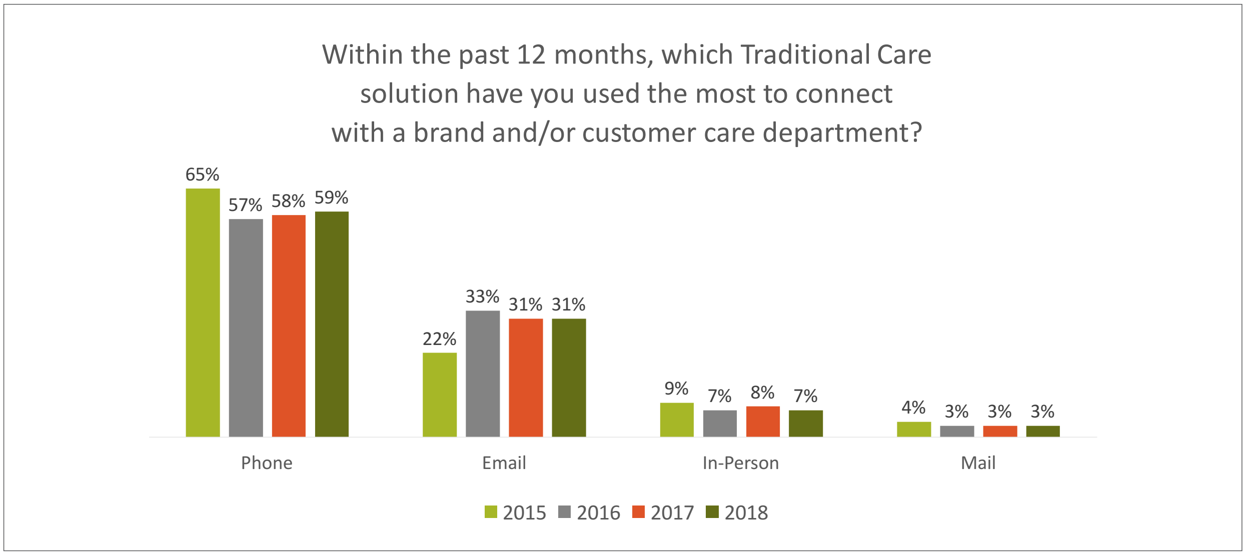
SOLUTION USE BY CHANNEL

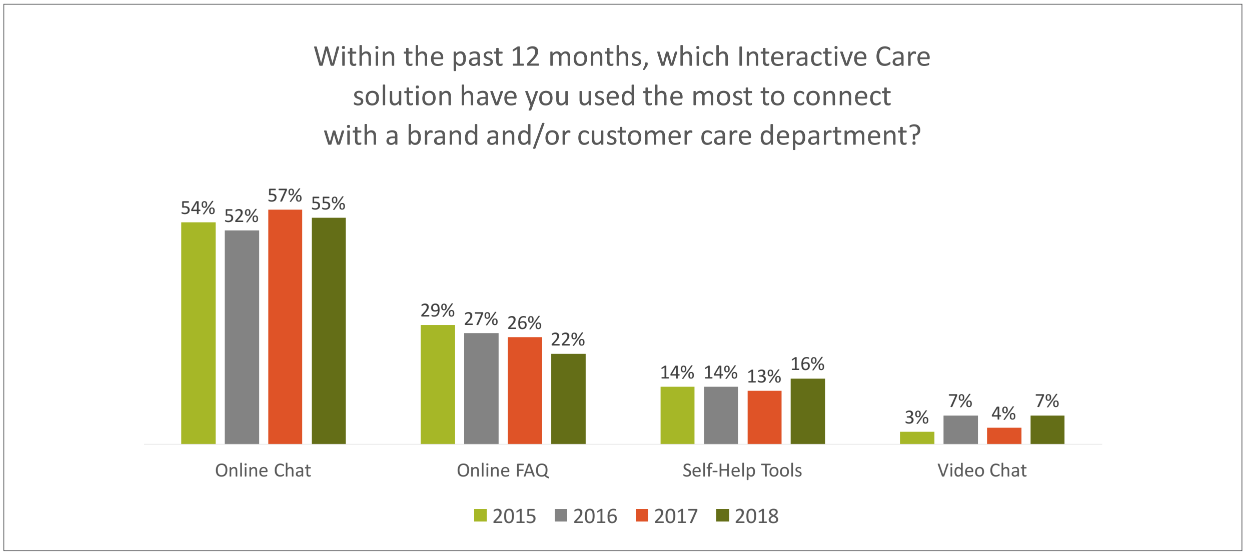
Consumer Experience — Consumer Use

Along with overall channel and solution use (previous page), CXMB Series results also include a breakdown of solutions most frequently used by contact channel. These include solutions used as a part of the following channels: Traditional Care, Interactive Care, Social Media Care (by community) and Mobile Care.

The use preferences of individual Traditional Care solutions were virtually unchanged year-over-year, with Phone remaining as the most frequently used solution, followed distantly by Email. As in past years, these two solutions account for the vast majority of all channel traffic, with 90% of all respondents naming one of the two as the Traditional Care solution they use most to connect with brands and/or customer care departments.



Among Interactive Care results, the most notable development was the continued decline in the use of Online FAQ. While aimed at determining the solution of most use, results also provide a fairly reliable representation of overall use. Since 2015, the percentage of consumers that have named Online FAQ as the solution they use most has fallen by seven points, representing a decline of 24%. Meanwhile, Self-Help Tools were buoyed in 2018, up three points (+23%), due in part, perhaps, to the increasing introduction of chatbots and other AI-powered solutions.



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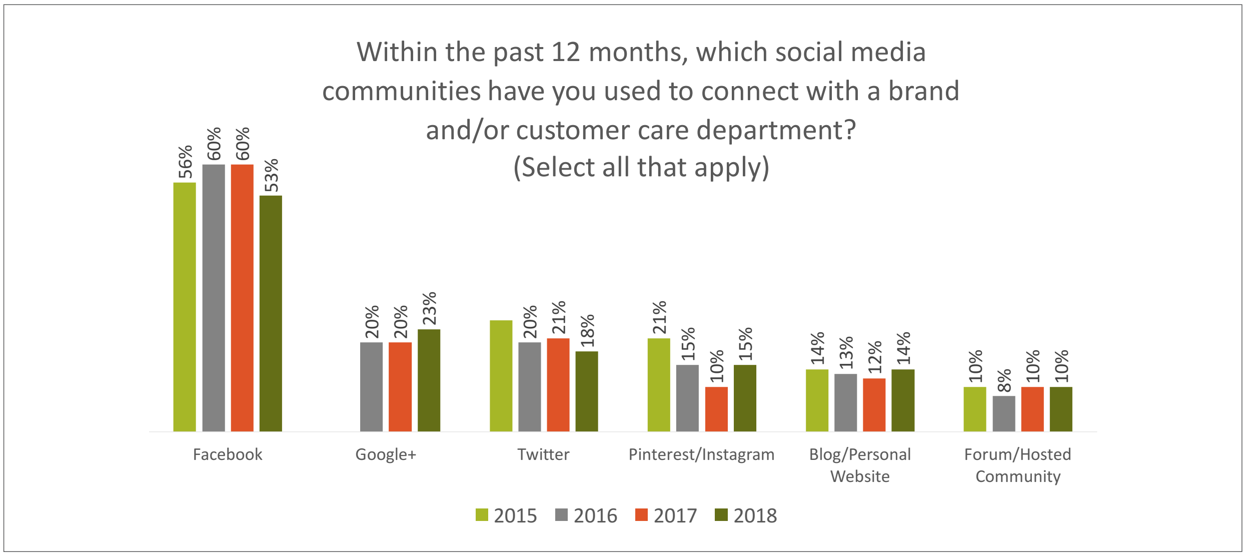
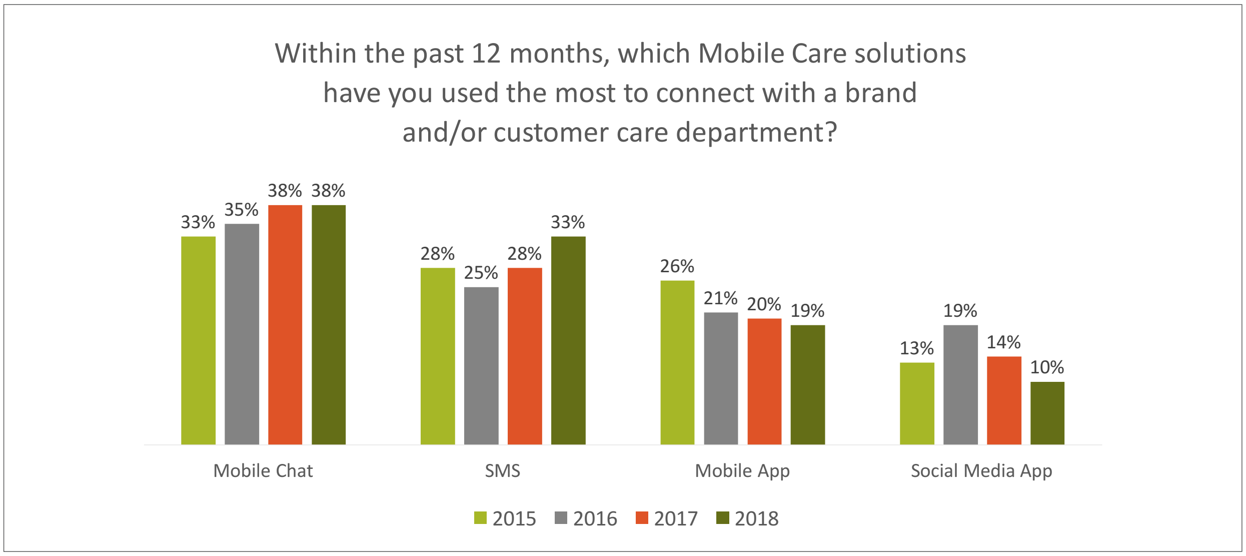
SOLUTION USE BY CHANNEL, continued

Consumer Experience — Consumer Use

Considering the overall decline in Social Media Care use, it follows that the two largest volume players, Facebook and Twitter, would show a decline in use. While Twitter was down three points (-14%), Facebook was off by seven points (-12%). Worth noting is the fact that this data was gathered in May 2018 amidst a public social media privacy issue, potentially impacting consumer opinion and the use of certain social media platforms.



Among Mobile Care solutions, SMS use extended its 2016-2017 growth, gaining five points year-over-year, an increase of 18%. As shown in the results above, the declining use of Social Media Apps accelerated in 2018, moving lower by four points, a decline of 29%, while Mobile Chat and Mobile App use remained consistent year-over-year.



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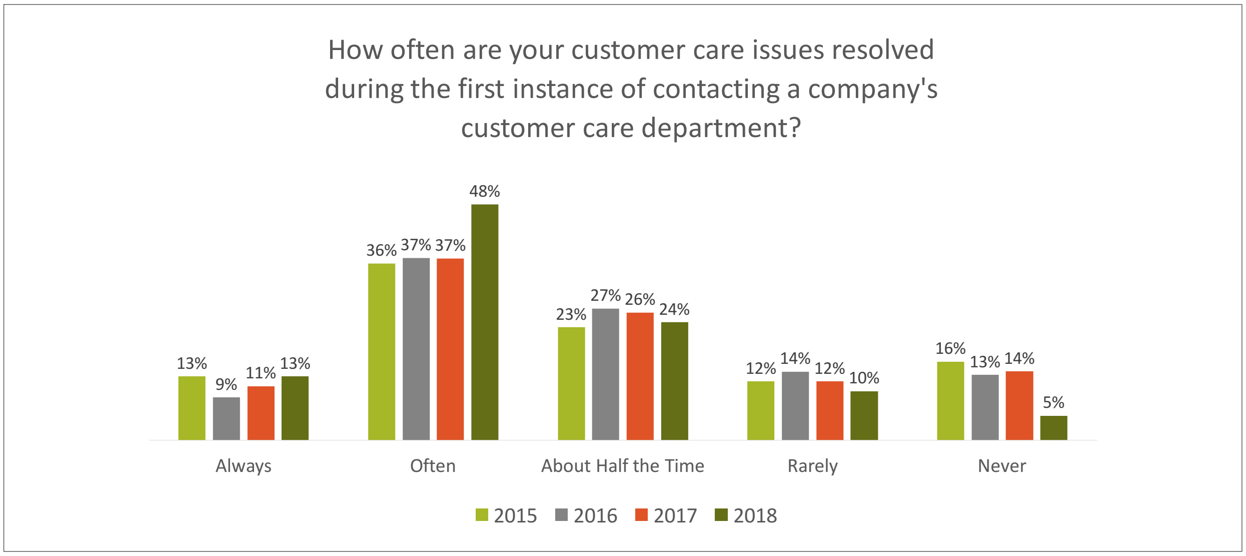
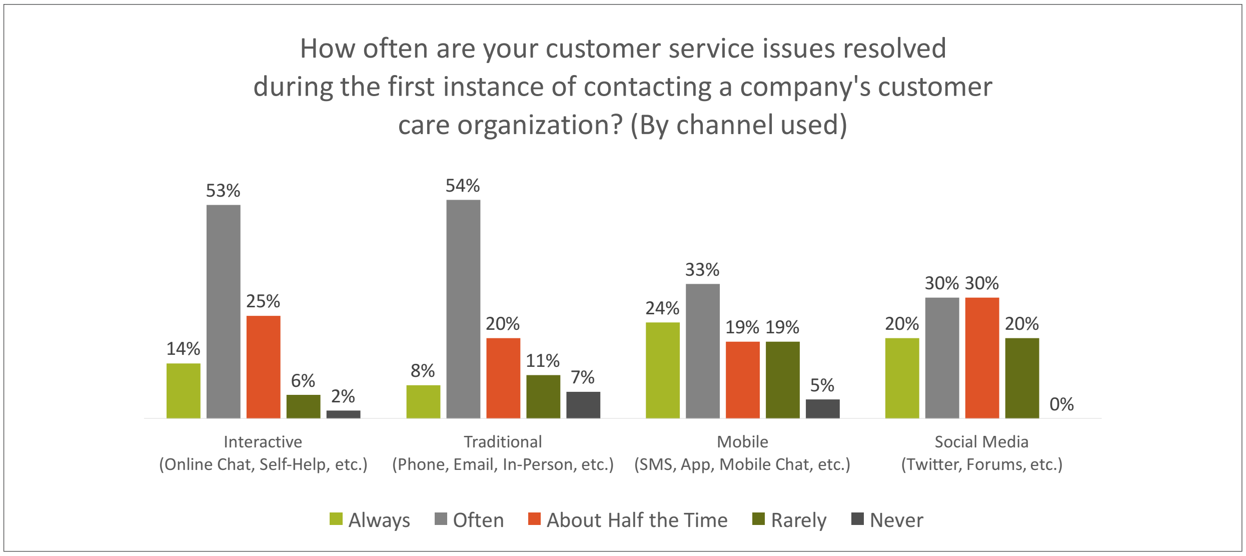
FIRST CONTACT RESOLUTION

Consumer Experience — Consumer Use

Compared to previous years, 2018 results depicted a strong upswing in the first contact resolution capabilities of brands. In addition to 61% of respondents indicating a first contact resolution “Always” or “Often,” which was the highest combined score since results were first gathered in 2014, only five percent of respondents indicated “Never,” which was also the lowest number on record. This is good news for brands and consumers alike, as multiple touchpoints to resolve a single issue is consistently named as a top frustration among consumers.



Among individual channels of care, users of Interactive Care provided the most favorable scores, with 67% of respondents indicating their issues were “Always” or “Often” resolved during the first instance of contacting a company. This compares with Traditional Care at 62% and Mobile Care at 57%. Social Media Care, on the other hand, managed a combined “Always” and “Often” result of only 50%, well below the 2018 combined average of 61%. Recent controversies aside, it appears companies continue to struggle with providing comprehensive issue resolution capabilities within the Social Media Care channel.



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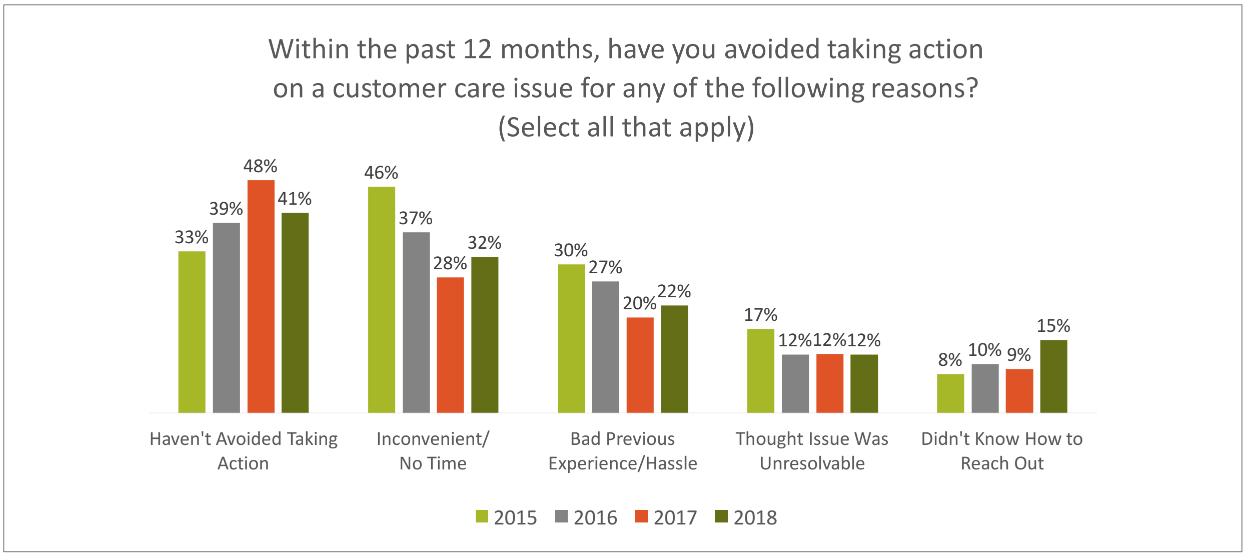
CARE AVOIDANCE AND LOST BUSINESS

Consumer Experience — Consumer Use

After two consecutive years of decline in the percentage of consumers avoiding taking action on a customer care issue, 2018 saw an increase in avoidance. This is reflected in the decrease in the percentage of respondents who said they "Haven't Avoided Taking Action." The largest percentage increase in the reason why these consumers avoided taking action was "Didn't Know How to Reach Out," which rose six points year-over-year, an increase of 67%. While this represents a very small percentage of all consumers, brands need to be vigilant in providing clear direction on contact options, especially as new automated solutions come online, bringing with them the potential to crowd out traditional avenues of contact.



Has a brand ever lost your business because you received poor customer care?

2018 — Yes: 59%
2017 — Yes: 57%
2016 — Yes: 59%
2015 — Yes: 56%

Consumers remain consistent when it comes to the consequences of receiving a poor customer experience. Like previous years, the majority of consumers indicated that one or more brands have lost their business because the care they received failed to meet expectations. This fact stresses the point that brand success is closely hitched to the quality of customer care. This should serve to put brands on notice — those who can't (or won't) provide an exceptional customer care experience run the serious risk of losing business.

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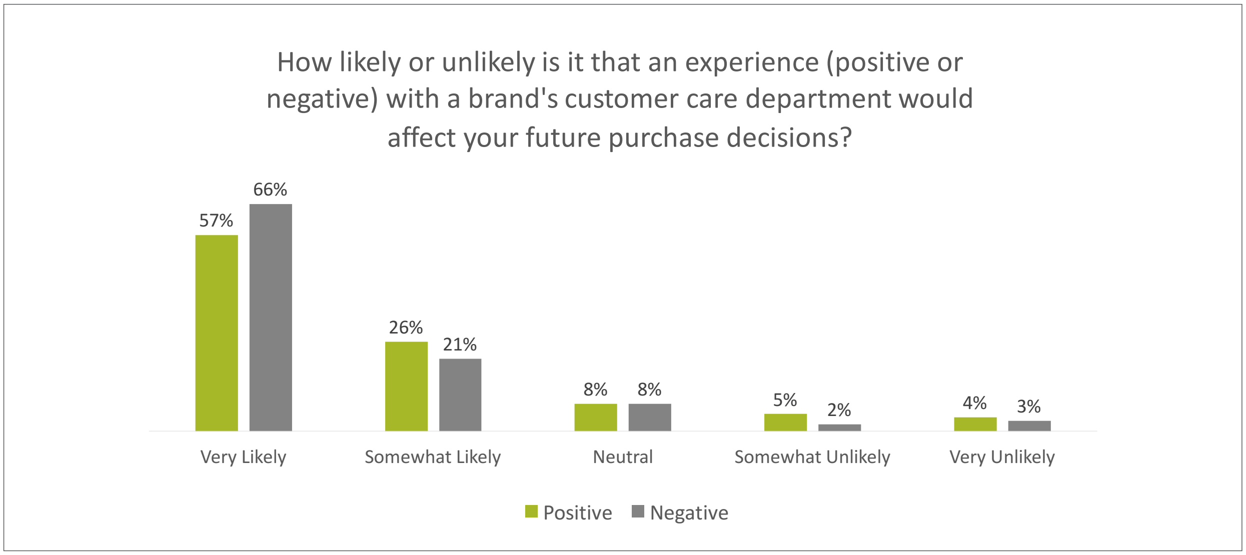
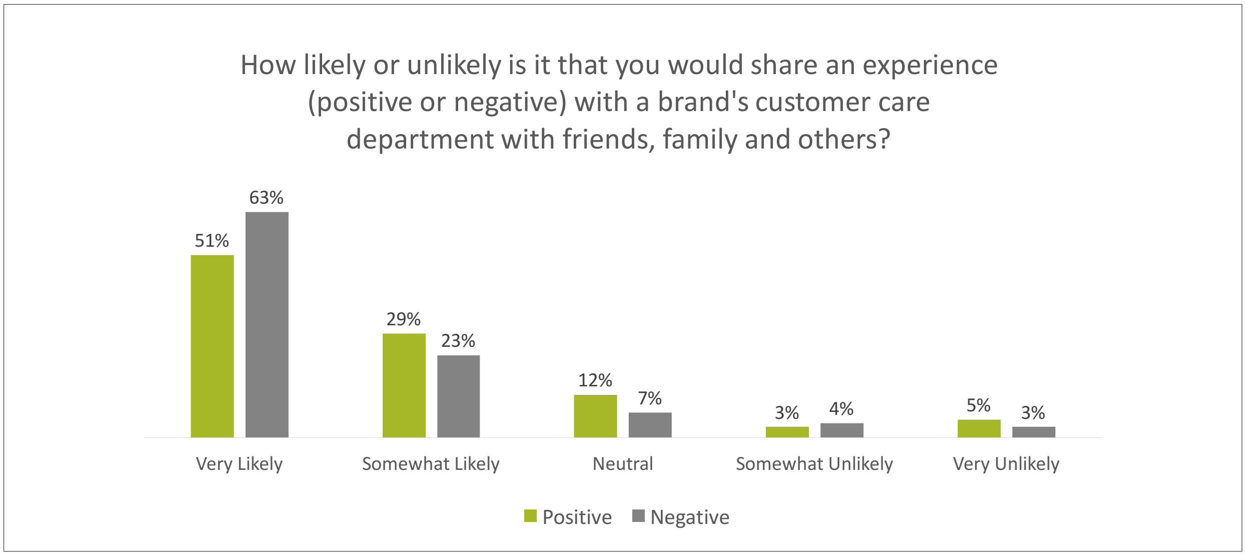
THE IMPACT OF POSITIVE (AND NEGATIVE) EXPERIENCES

Consumer Experience — Consumer Use

Similar to results from previous years, negative experiences produced a profound impact on a customer's likelihood to make a future purchase with a brand. When a customer care experience was positive, 83% of respondents indicated that is was "Very Likely" or "Somewhat Likely" to have a positive impact on their future purchase decisions. This compares to 87% of respondents who indicated that a negative experience was "Very Likely" or "Somewhat Likely" to have a negative impact on future purchase decisions. So, while both types of experiences greatly influence future outcomes, negative experiences wield more weight.



Like future purchase decisions (above), positive and negative experiences profoundly impact the likelihood of customers sharing their experiences with others. When an experience is positive, 80% of respondents indicated that it was "Very Likely" or "Somewhat Likely" they would share the experience with others. This contrasts with the 86% of respondents who said it was "Very Likely" or "Somewhat Likely" they would share their negative customer care experiences with others. Similar to the results above, negative experiences hold greater sway over future actions when compared to positive experiences.



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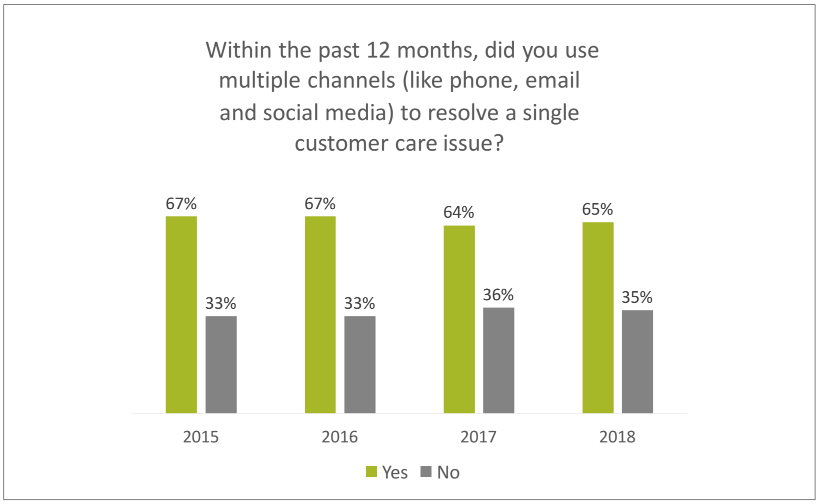
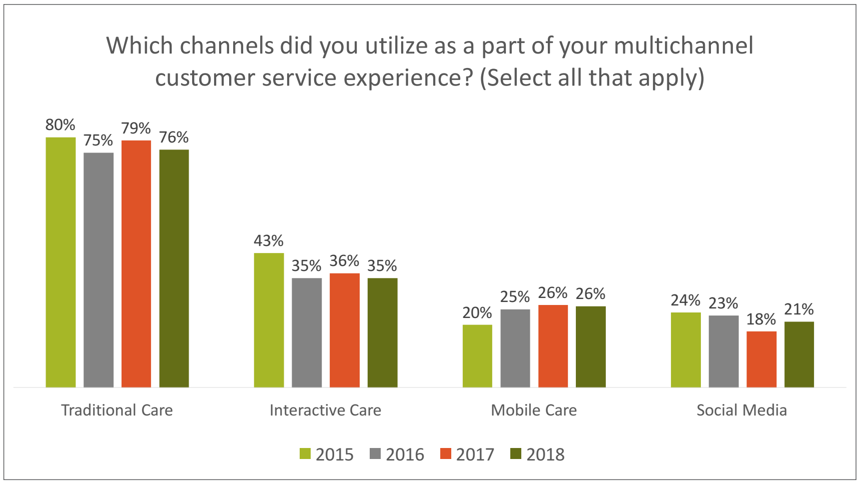
The Multichannel Journey

MULTICHANNEL USE AND USE BY CHANNEL AND SOLUTION TYPE

Consumer Experience — The Multichannel Journey

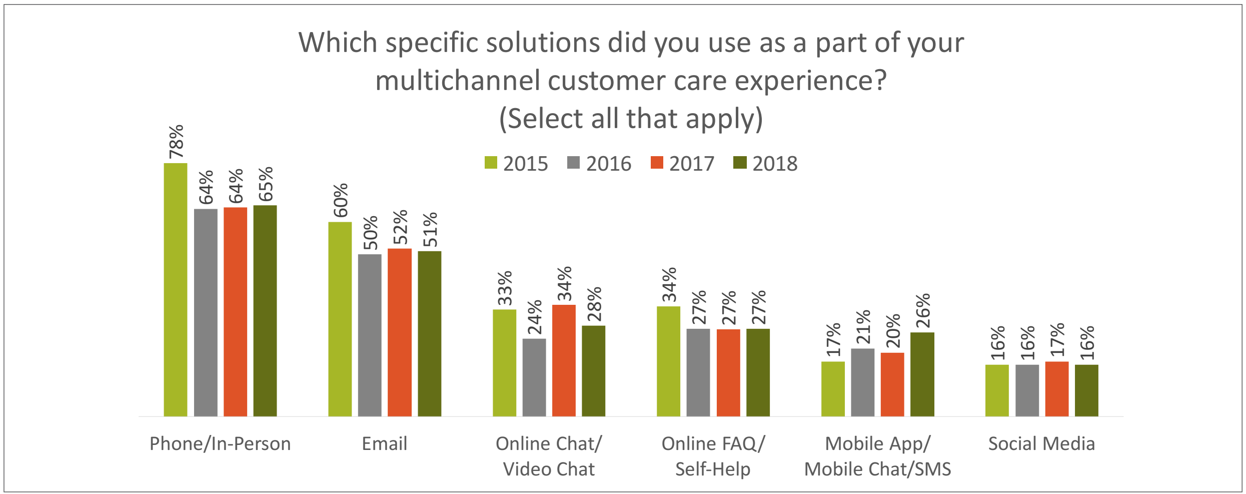
Multichannel usage has remained steady across all four years of CXMB Series data. Consistently, about two-thirds of survey respondents over the past four years have indicated they have had at least one multichannel journey to resolve an issue in the previous 12 months. Given these results, it is crucial that brands provide their customers with an exceptional multichannel experience, including high CSAT and resolution rates, and ease when shifting between channels.





Traditional Care continues to dominate the multichannel journey mix, with more than three-quarters of all multichannel engagements including one or more Traditional Care solutions. A full breakdown on the specific solutions can be found below.

As expected based on the results above, Traditional Care solutions (specifically, Phone/In-Person and Email) are commonplace to the multichannel experience, with their inclusion remaining unchanged year-over-year. Online Chat/Video Chat also moderated in 2018 after a massive jump in 2017. Brands will need to continue to find ways to create smooth transitions between channels, particularly when it comes to navigating between Traditional and Interactive Care solutions, e.g., moving from an online chat to a phone call.



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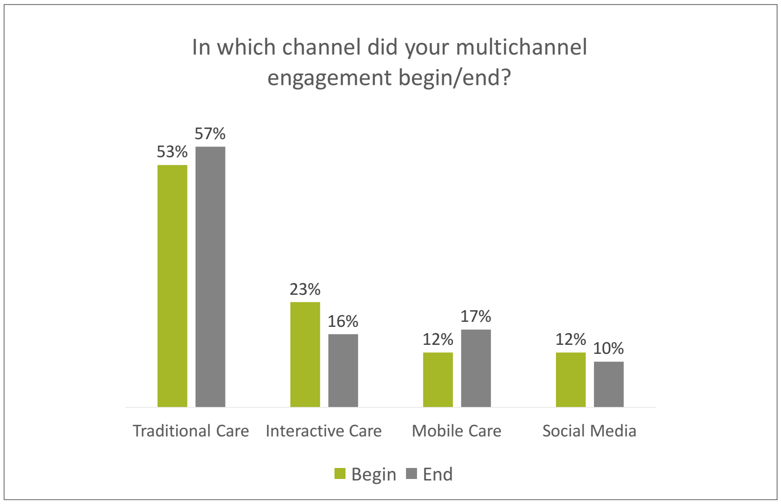
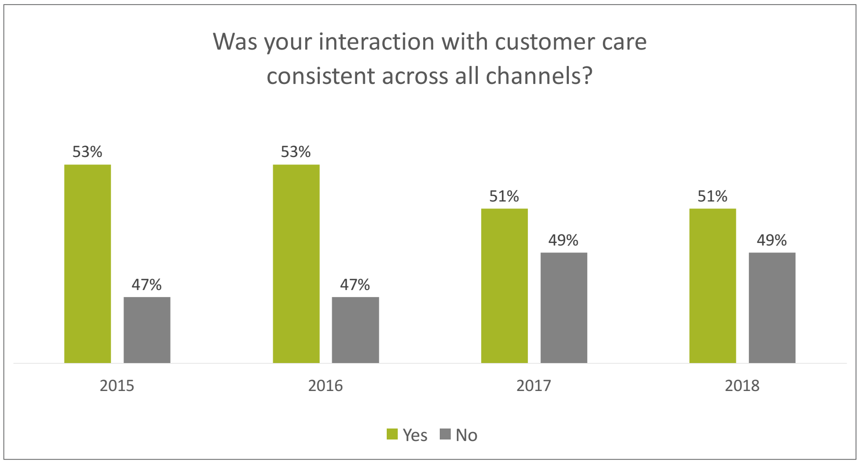
PERFORMANCE, CONSISTENCY AND REASON FOR APPROACH

Consumer Experience — The Multichannel Journey

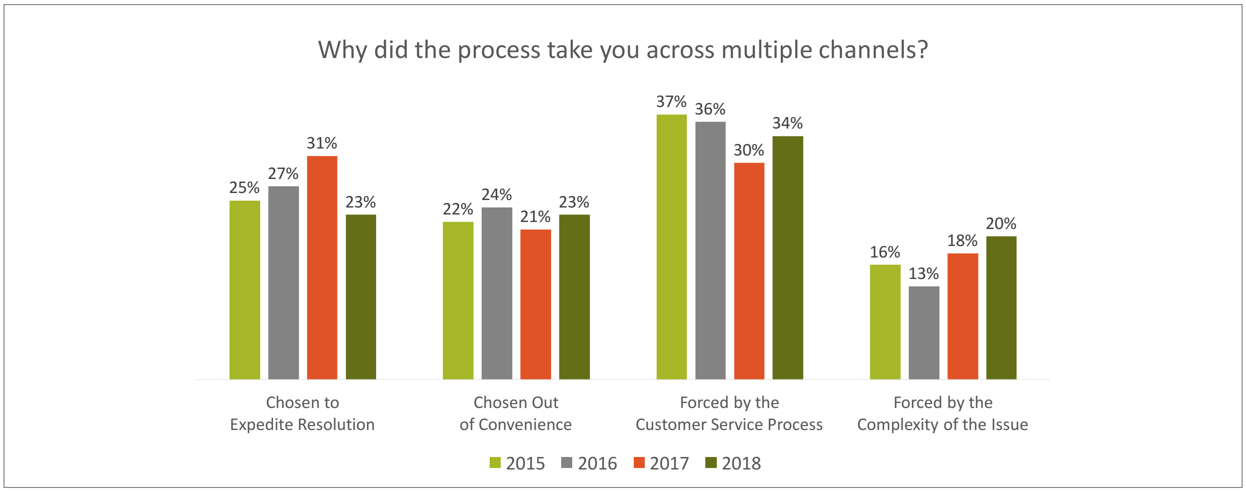
In a question aimed at understanding where consumers ultimately go to get a final resolution to their issues, we see the continuation of a trend dating back to 2014. Traditional Care continues to be a final destination, while Interactive and Social Media Care are more often starting points rather than end points. A significant shift was also observed for the Mobile Care channel, with fewer engagements beginning in Mobile Care than ending there. This suggests an improvement in the overall resolution capabilities of Mobile Care over those of previous years.





Like multichannel use (previous page), cross-channel consistency remains range-bound, with roughly half of multichannel users indicating a consistent experience as they move from channel to channel. A consistent experience, regardless of channel of choice, contributes to customer satisfaction. Brands should view improvements in channel consistency as an area of prime opportunity.

An important aspect of understanding the multichannel experience is to understand whether the journey was self-selected or forced. In 2018, more survey respondents were forced into the journey (54%) than at any other point in the dataset. As seen on page 21, forcing customers into a multichannel journey (as opposed to allowing them to choose a multichannel journey on their own) can have a detrimental impact on both satisfaction and resolution rates. Therefore, brands should always be searching for ways to package the multichannel journey as an option rather than forcing customers along such a path, often by pushing them out of their channel of choice.



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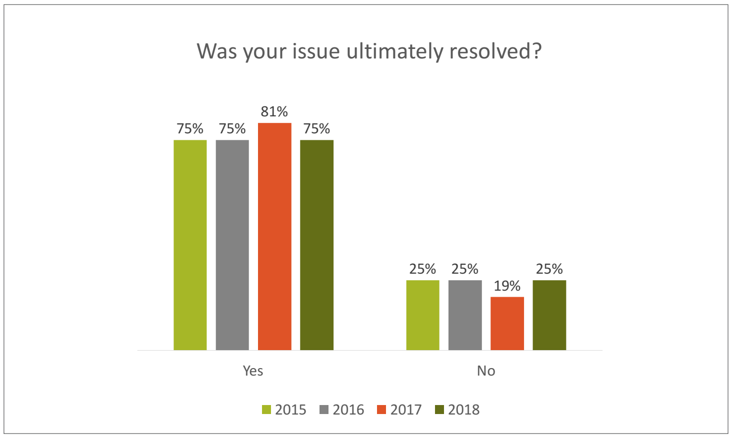
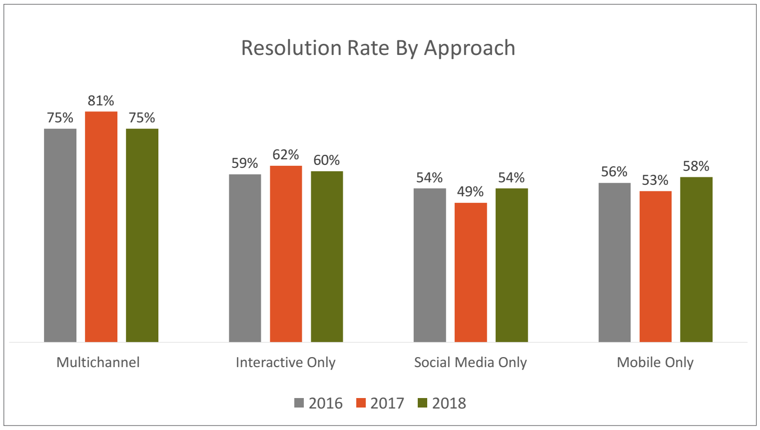
MULTICHANNEL RESOLUTION AND SATISFACTION RATES

Consumer Experience — The Multichannel Journey

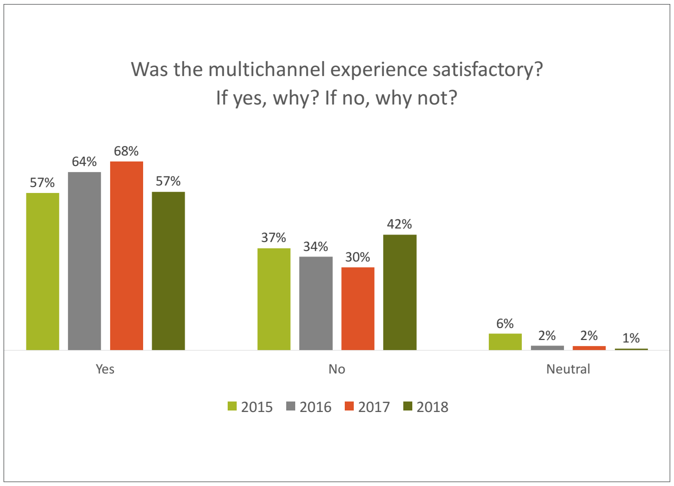
The resolution rate of multichannel fell by six points year-over-year (-7%). Even still, a multichannel path continues to provide an effective path to issue resolution, especially when compared to any single alternative care channel, as highlighted in the resolution rate breakdown provided below. That said, it's worth noting that, while the resolution rate of multichannel may have been higher than any single alternative channel, the satisfaction rate for multichannel was lower when compared to individual alternative channels of care by an average of 24 points.





With a resolution rate of 75%, a multichannel approach to issue resolution outperforms stand-alone alternative channels, besting individual alternative channels by a range of 15-21 points. Although this should come as no surprise — since consumers are prone to hop from channel to channel in search of a resolution — it should serve as a clarion call to improve the resolution capabilities of individual alternative channels.

After two consecutive years of steady improvement, consumer satisfaction with multichannel took a big hit in 2018, falling back to a low last seen in 2015. This came in the form of an 11-point drop, a decline of 16%. The two central frustrations of those who were not satisfied with the multichannel experience: the inability to reach a live person and poor management of information across channels. Consumers also expressed dissatisfaction with dealing with overseas call centers and with the lack of follow-up once a live person had been reached. Based on 2018 results, multichannel was pretty effective at providing resolutions, but satisfaction was lacking.



Below is a selection of verbatim responses from the open-ended portion of the question at left. This selection is representative of the most common themes that were observed in the responses received.

Satisfied

"Sending an email and leaving a voicemail made me feel like there was no excuse to not get back to me."

"In all cases, getting to a human moved the issue to resolution."

"Using multiple channels helps expedite the situation."

"It was convenient and easy and worked."

Dissatisfied

"It seemed as if they tried avoiding contact with the customer."

"It took too long to get to a live person."

"Bad relay of info across channels."

"Not the same level of knowledge across channels."

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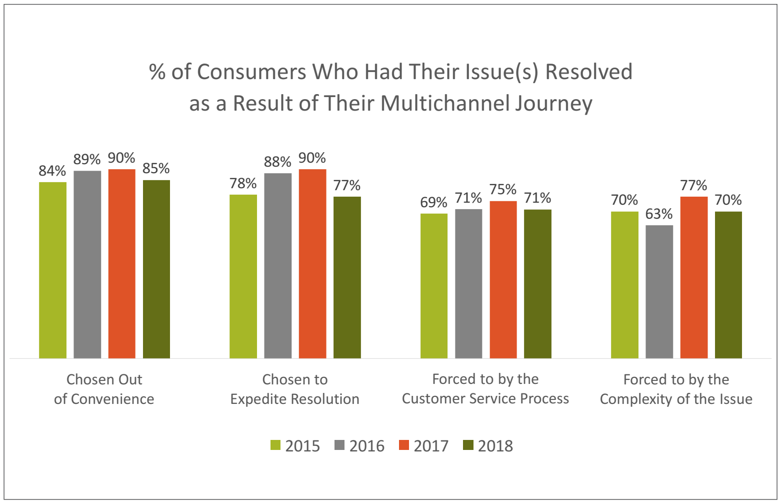
THE IMPACT OF CHOICE ON MULTICHANNEL OUTCOMES

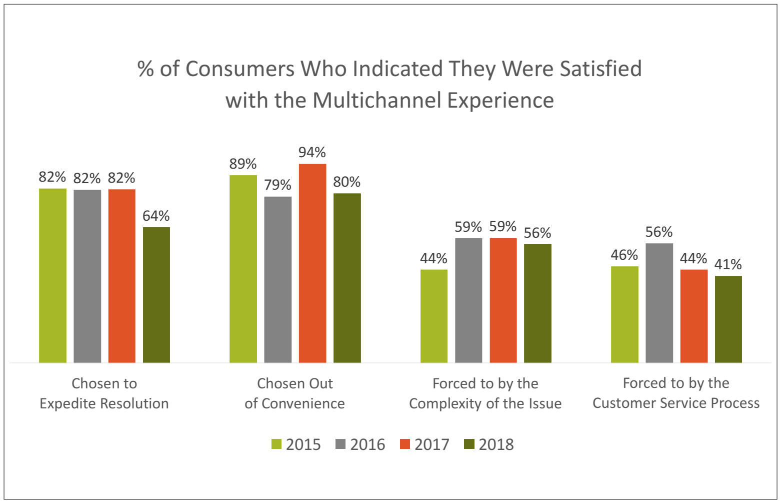
Consumer Experience — The Multichannel Journey

Whether or not customers chose a multichannel path or were forced into it (page 19) continues to have a profound impact on both the likelihood of receiving a resolution and on the satisfaction with the multichannel experience. To illustrate this impact, resolution and satisfaction results have been cross-referenced by whether or not survey respondents self-selected a multichannel path or were forced into one. Based on these results, which are presented below, it’s clear that brands need to find ways to make multichannel as much of an optional path as possible and, when it's not, provide customers with a clear and easy path for switching to a channel of their choice.

Issue resolution rates are lower by an average of roughly 11 points when consumers are forced into a multichannel journey as opposed to self-selecting the journey. This translates into a resolution rate that is nearly 14% lower. In 2018, more than 60% of all forced multichannel experiences occurred as a result of the customer service process rather than as a result of the complexity of the issue. This presents brands with an opportunity to improve policy and process, while also getting better at helping customers find their way to channels that can most effectively resolve their issues.



Although consumer satisfaction with the multichannel experience was down in 2018, the impact of a forced multichannel experience remains evident. Customer satisfaction with the multichannel experience was an average of 24 points lower when the experience was forced, a decline of 33%. Respondents from this year’s survey were especially frustrated with difficulties in reaching a live person (page 20). These challenges were further compounded by brand-side miscommunications and inconsistencies that occurred as consumers navigated across channels.



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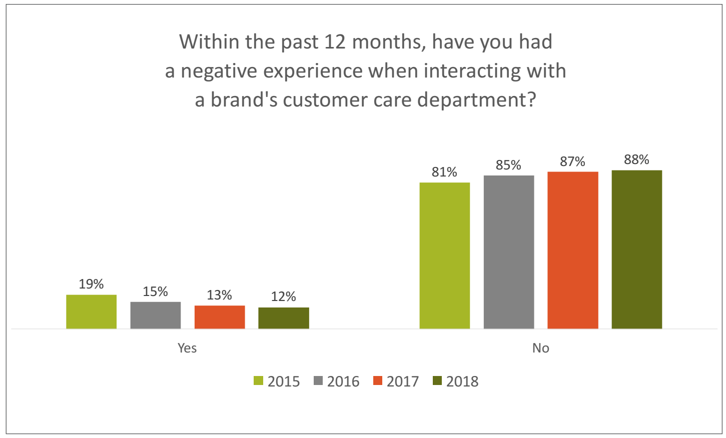
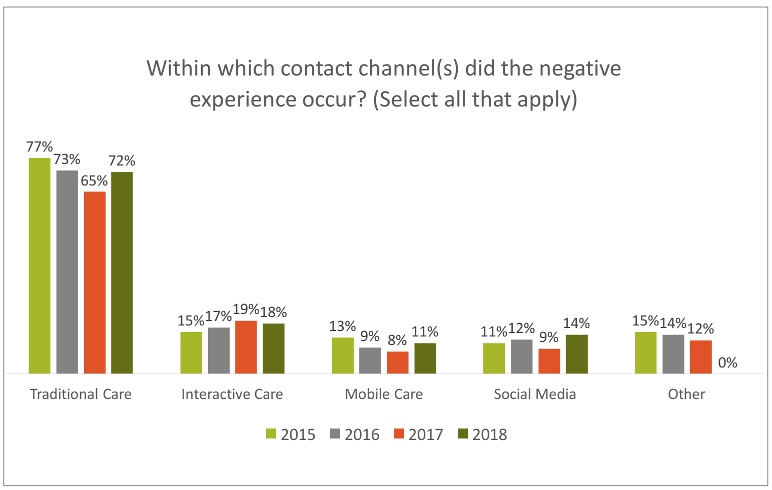
The Unhappy Consumer

NEGATIVE EXPERIENCES (BY CHANNEL AND SOLUTION)

Consumer Experience — The Unhappy Consumer

Since 2015, CXMB Series research has been investigating the experiences of consumers who reported having a recent negative interaction with a brand's customer care department. The good news: the prevalence of such consumers has steadily diminished over time. In 2018, only 12% of respondents answered "Yes" to the screening question at right.



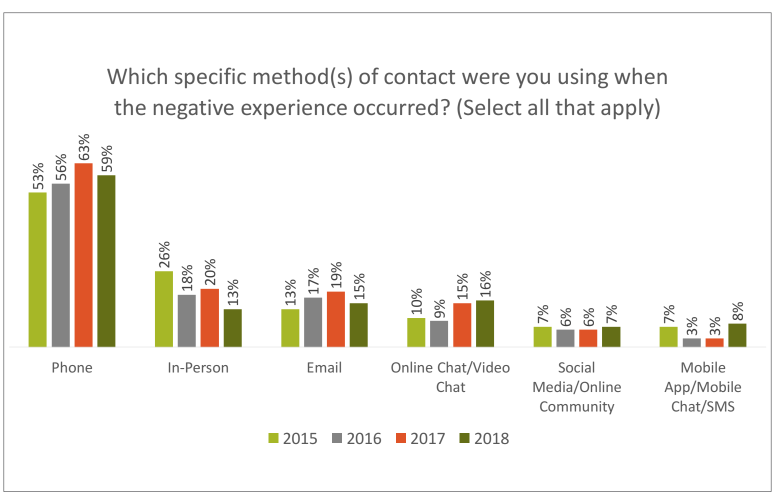


Inferred Quality Rating
2015/2016/2017/2018 Results

Interactive Care: +23/+18/+8/+22
Traditional Care: +7/+13/+9/+13
Mobile Care: +3/-2/+5/+1
Social Media Care: +5/+4/+9/+0

About this rating:
Since some care channels are used more often than others, we wanted to put in place a mechanism that would account for this imbalance. The above Inferred Quality Rating is an expression of the percentage difference between utilization rates (page 11) and negative experience rates (at left). While not a precise model, this rating is intended to provide a general sense of channel quality. **The higher the number, the less likely were the odds of a survey participant having a negative experience in the channel.**

Even when accounting for the difference in use rate, negative experiences continue to be most common in Traditional (Phone and In-Person, specifically) and Social Media Care, and least common in Interactive and Mobile Care. Among individual solutions, and also accounting for use rates, negative experiences are the most for In-Person and Phone interactions and the least common for Email interactions.



Inferred Quality Rating
2015/2016/2017/2018 Results

Email: +30/+32/+24/+31
Online/Video Chat: +25/+27/+16/+21
Social Media: +6/+14/+13/+10
Mobile App/Chat: +5/+9/+15/+9
Phone: +17/+8/+0/+8
In-Person: -6/-7/-3/+3

About this rating:
Since some care solutions are used more often than others, we wanted to put in place a mechanism that would account for this imbalance. The above Inferred Quality Rating is an expression of the percentage difference between utilization rates (page 11) and negative experience rates (at left). While not a precise model, this rating is intended to provide a general sense of solution quality. **The higher the number, the less likely were the odds of a survey participant having a negative experience in the channel.**

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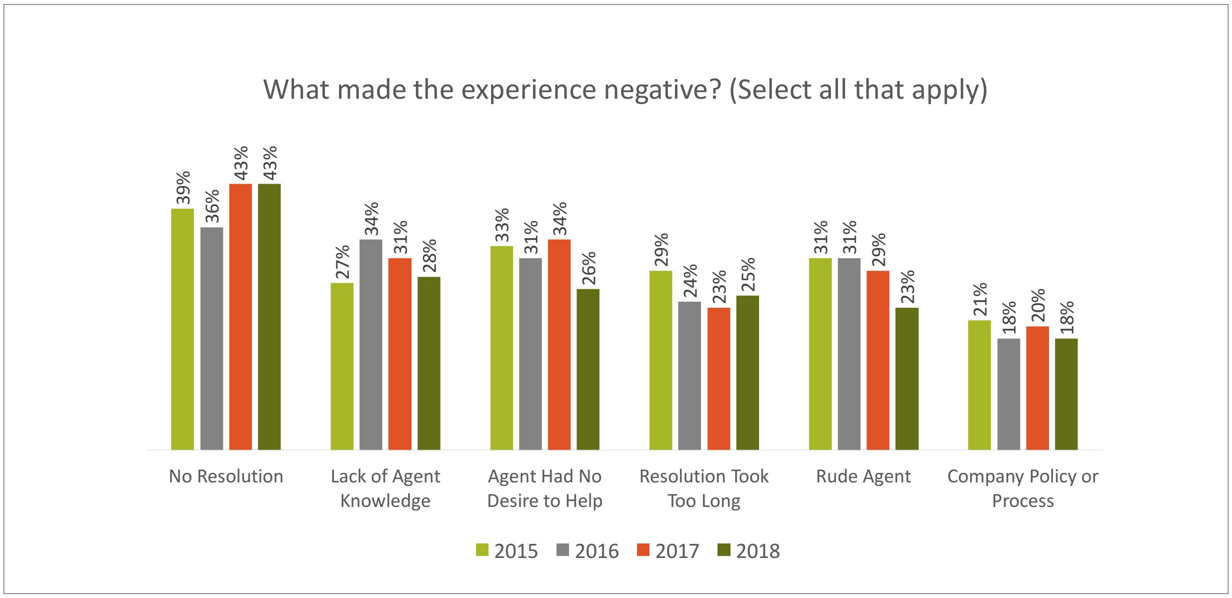
REASON FOR THE NEGATIVE EXPERIENCE AND SHARING HABITS

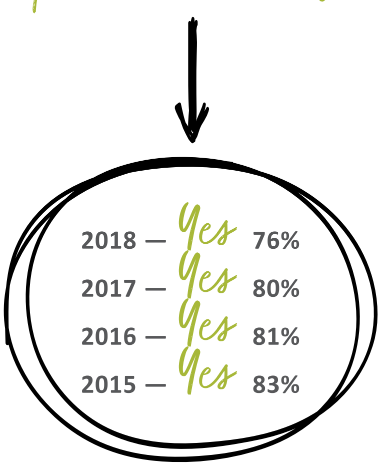
Consumer Experience — The Unhappy Consumer

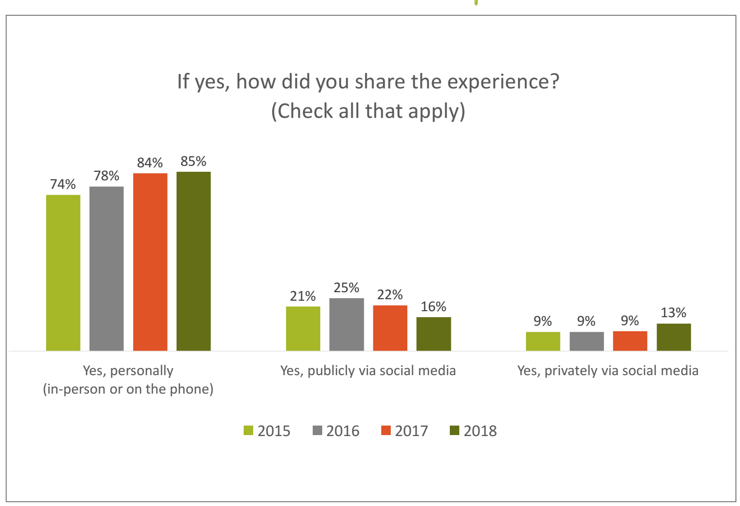
“No Resolution” remains the most common cause for a negative experience when interacting with a brand’s customer care department, followed by a resolution taking too long and a trio of agent-specific issues. Worth noting is the measurable, year-over-year decline in survey respondents citing agent-specific reasons as the cause of their negative experience. In particular, responses like, “Agent Had No Desire to Help” and “Rude Agent” saw their lowest returns ever, falling eight points and six points, respectively.



The likelihood of a negative experience being shared with others fell slightly in 2018, moving four points lower year-over-year, a decline of five percent. Regardless of this move lower, more than three-quarters of respondents still indicated they had shared details about their negative experience. On the bright side, public shares via social media were down sharply, marking two straight years of decline. The most recent decline (down six points) could be a result of the social media privacy issues, as alluded to on page 13. Regardless of these reductions, brands continue to run the risk of lost business as a result of unhappy customers voicing their discontent on social media; and brands need a strategy for counteracting or heading off such activities.

Did you share this negative experience with friends, family and/or strangers?





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THE BUSINESS IMPACT OF NEGATIVE EXPERIENCES

Consumer Experience — The Unhappy Consumer

Even though the customer service experience was negative, was your issue eventually resolved to your satisfaction?

2018 — Yes 41%

2017 — Yes 38%

2016 — Yes 35%

Will this negative experience impact your future purchase decisions?

2018 — Yes 78%

2017 — Yes 82%

2016 — Yes 83%

Were you given the opportunity to express your dissatisfaction via a survey or other feedback form?

2018 — Yes 46%

2017 — Yes 44%

2016 — Yes 32%

If so, did you take advantage of the opportunity to express your displeasure?

2018 — Yes 67%

2017 — Yes 67%

2016 — Yes 62%

Results from the CXMB Series continue to illustrate a critical point about negative experiences: even if a brand resolves an issue to a customer's satisfaction following a negative experience, there are still serious consequences. In 2018, 76% of respondents indicated that, even though their issue was eventually resolved to their satisfaction, the experience as a whole would still have a negative impact on their future purchase decisions.

Percentage of Consumers Who Had Their Issue Resolved to Their Satisfaction but Still Indicated a Negative Impact on Future Purchase Decisions.

2018 — Yes 76%

2017 — Yes 82%

2016 — Yes 82%

Even though a negative experience is likely to have a negative impact on future purchase decisions regardless of an eventual satisfactory resolution, following the negative experience with a proactive contact can lower this effect by 16 points, a reduction of up to 19%, as seen at the bottom of the page.

Following the negative experience, did the brand proactively contact you to try to remedy or apologize for the situation?[5]

2018 — Yes 23%

2017 — Yes 15%

2016 — Yes 20%

Percentage of Consumers Who Indicated the Negative Experience Will Have a Negative Impact on Future Purchase Decisions Based on Their Proactive Contact Status.

Proactively Contacted	Not Proactively Contacted
2018 — Yes 67%	2018 — Yes 83%
2017 — Yes 73%	2017 — Yes 84%
2016 — Yes 73%	2016 — Yes 86%

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Unassisted Channels

USAGE, RESOLUTION AND SATISFACTION RATES

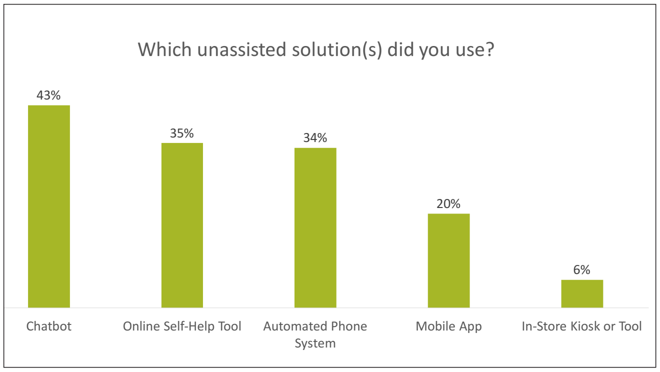
Consumer Experience — Unassisted Channels

In an entirely new area of research for 2018, we asked 652 recent users of customer care whether or not they used an unassisted solution in attempting to resolve their issue. A fair portion of respondents indicated they had used one or more unassisted solutions in an attempt to resolve their issue, demonstrating the pervasiveness of such solutions.

Percentage of consumers that used an unassisted solution (like a chatbot, online self-help tool, phone IVR system or FAQ) in attempting to resolve their most recent customer care issue?

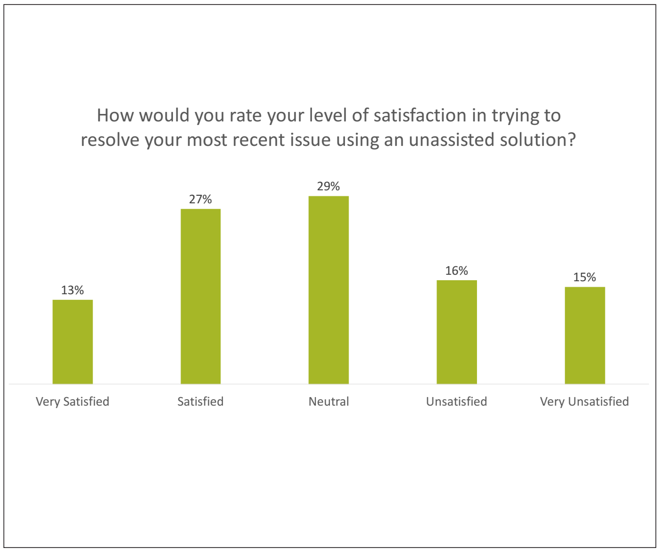
42%

A breakdown of specific unassisted solutions use (below) shows a mix dominated by three specific solutions: chatbots, online self-help tools and automated phone systems. Across all solutions, 57% of individuals said they were able to resolve their issue using an unassisted channel. Resolution rates for individual solutions varied significantly, as follows: Chatbot (65%), Online Self-Help Tool (60%), Automated Phone Systems (44%), Mobile App (67%) and In-Store Kiosk (33%).



Percentage of consumers who were able to ultimately resolve their issue using an unassisted solution.

57%



When asked about their level of satisfaction with their unassisted solution experience, 31% of respondents indicated they were either "Unsatisfied" or "Very Unsatisfied." To put this result in context, below are similar results from users of other various channels and paths of interaction. Clearly, much work remains to be done in creating a more positive customer experience for unassisted solutions.

Level of Dissatisfaction

Multichannel Users — 42%
Traditional Care Users — 21%
Interactive Care Users — 18%
Social Media Care Users — 19%
Mobile Care Users — 20%

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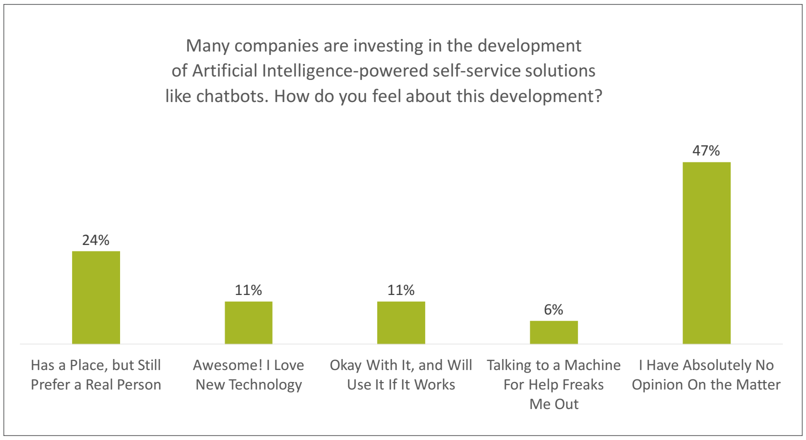
ISSUE RESOLUTION BEHAVIOR AND OPINIONS ON ARTIFICIAL INTELLIGENCE (AI) AND UNASSISTED CHANNELS

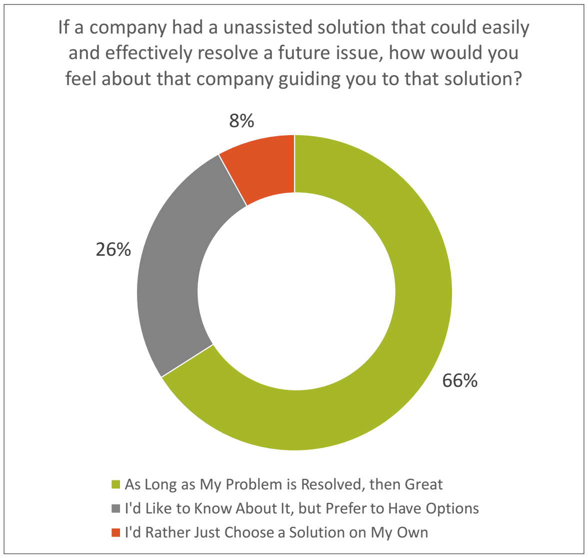
Consumer Experience — Unassisted Channels

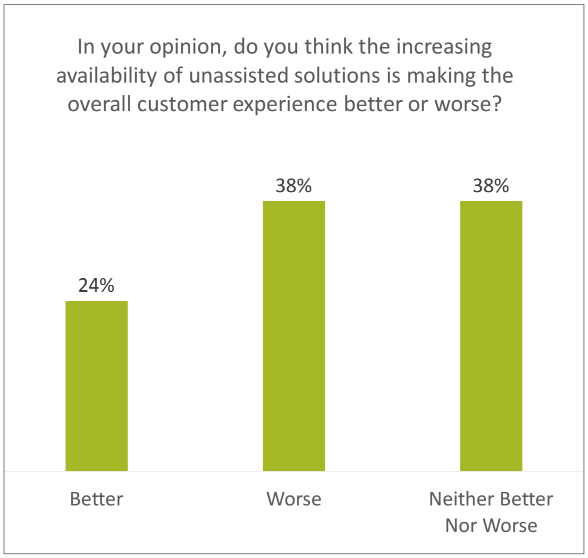
Users of unassisted solutions are about as likely to try to resolve an issue on their own as the general public. Yet, when it comes to trying to find a solution online, they are significantly more likely to do so compared to the general public. Additionally, members of the general public are also more likely to try to contact brands directly when faced with an issue versus users of unassisted solutions.



While almost half of all users of unassisted solutions had absolutely no opinion on the current investment in AI technology, of those who did, half felt that AI has a place, but they'd still prefer to talk to a person. As such technology spreads, brands should be aware of the opinions and preferences of their own customers, which can provide clues about the rate of adoption of such solutions.

In a pair of questions aimed at understanding the perception and impact of unassisted solutions, consumers are firm in their opinion that if an unassisted solution helps resolve their issue then they are on board with the idea (below, left). But, given the current resolution rate (previous page), and the results of the question (below, right), unassisted solutions haven't quite delivered. The fact is, only about a quarter of current unassisted solution users think the increasing availability of such solutions is having a positive impact on their overall customer experience.





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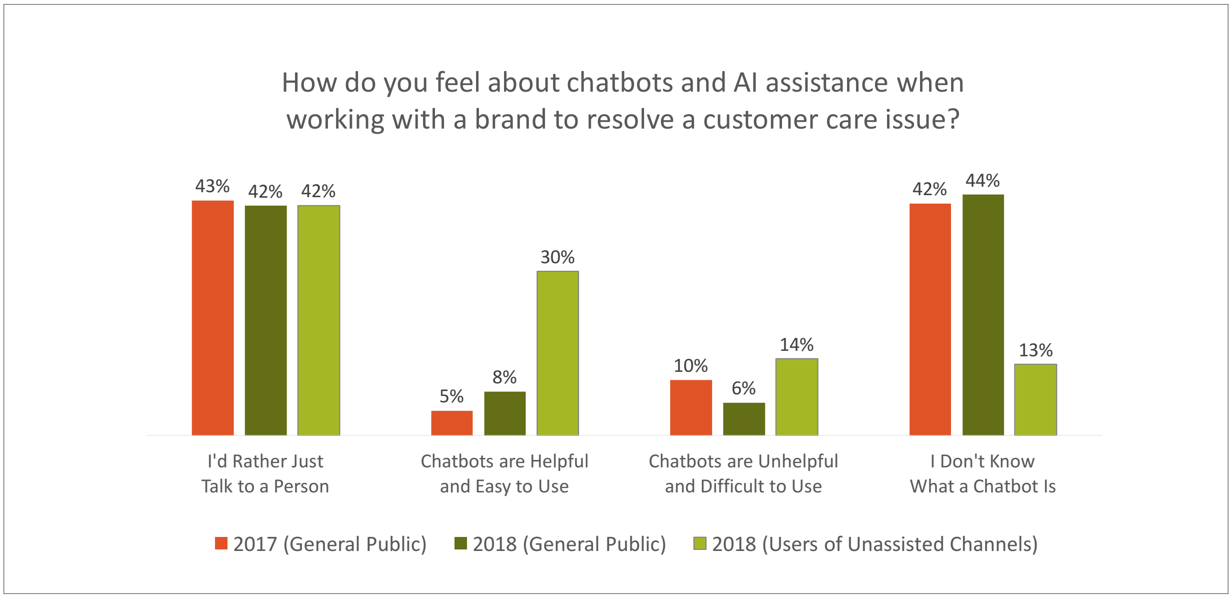
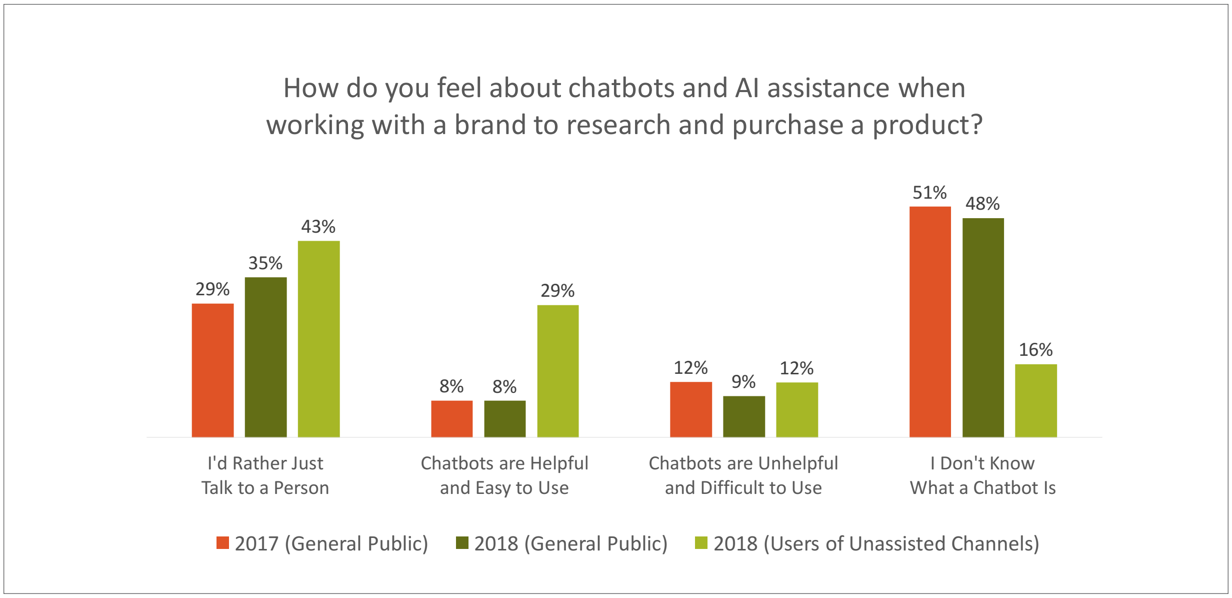
CONSUMER OPINIONS ON CHATBOTS

Consumer Experience — Unassisted Channels

Awareness and acceptance of chatbots and AI assistance is far greater among current users of unassisted solutions compared to the general public. And, although the preference to speak with a real person appears to be the same between both groups, it's actually far greater among the general population once those answering, "I Don't Know What a Chatbot Is" are removed from the sample. Also, not only are current users of unassisted solutions more willing to utilize such solutions, more than twice as many find unassisted solutions to be helpful and easy to use than those who find them unhelpful and difficult to use.



In regard to using chatbots and AI assistance for help in researching and purchasing products, results are similar to those above. When filtering out those who don't know what chatbots are, the general public is more likely to want to talk to a person. Furthermore, current users of unassisted solutions are more than twice as likely to find chatbots helpful and easy to use than to find them unhelpful and difficult to use. Clearly, brands who are looking to deploy such solutions would benefit by encouraging early awareness and adoption among their customers.



Sample: National Adult Internet Population. For more details, see the Methodology section. Copyright © 2018 Execs In The Know, LLC. All rights reserved.

CONSUMER EXPERIENCE CONCLUSIONS

Key Findings:

- Compared to 2017, 2018 saw a general bump in the use of Interactive Care solutions combined with a decline in the use of Social Media Care (page 11).
- 2018 saw an upswing in first contact resolution (FCR), with 61% of respondents saying their issues are “Always” or “Often” resolved on first contact, the highest total in four years' worth of data (page 14).
- The resolution rate of multichannel engagements remains high at 75%, yet satisfaction with the multichannel experience remains low at 57% (page 20).
- 66% of unassisted solution users are okay with being guided to such a solution so long as it resolves their issue, but only 24% of this same group think the increased availability of unassisted solutions has improved their overall customer experience (page 28).

Channel use saw a notable change year-over-year, with Interactive Care experiencing a 13-point bump in use, an increase of 48% over 2017. At the same time, Social Media Care use fell four points, a decline of 22%. Among social media communities, both Twitter and Facebook were hit especially hard, with usage off 12% and 14% year-over-year, respectively.

Satisfaction rates remain a challenge for multichannel engagements, failing to break 60% in 2018 and falling 16% year-over-year. Even with the under-performance of satisfaction, resolution rates continue to outperform those of individual alternative channels, hinting that challenges with multichannel lay not with outcomes but with the process. Common complaints revolving around access to live agents and consistency/communication across channels continued to remain front and center in 2018.

New for 2018 is the introduction of a series of questions aimed at users of unassisted channels. Although the dissatisfaction rates of unassisted solution users were not as high as those who had taken a multichannel journey, they were significantly more than those of users of alternative channels, including Interactive, Social Media and Mobile Care users. And, while users of unassisted channels are open to being guided to such solutions, their willingness to use such solutions rests with the effectiveness of such solutions. Given that users reported a resolution rate of just 57% for unassisted solutions, it’s clear brands have more work to do in creating effective, easy-to-use unassisted solutions.

Critical Questions Brands Should Be Asking Themselves

Are we making the multichannel approach an option, and are we doing enough to create a consistent and positive experience throughout the process?

If we are implementing an AI-powered solution like a chatbot, is it effective, does it add value to the customer experience and are we doing enough to drive awareness and early adoption among our customers?

Methodology of 2018 CXMB Series results: Conducted by Google Consumer Surveys, May 2018 and based on an average sample size of 220 online responses.
Sample: National Adult Internet Population. For more details, see the Methodology section. Copyright © 2018 Execs In The Know, LLC. All rights reserved.

Consumer Opinion

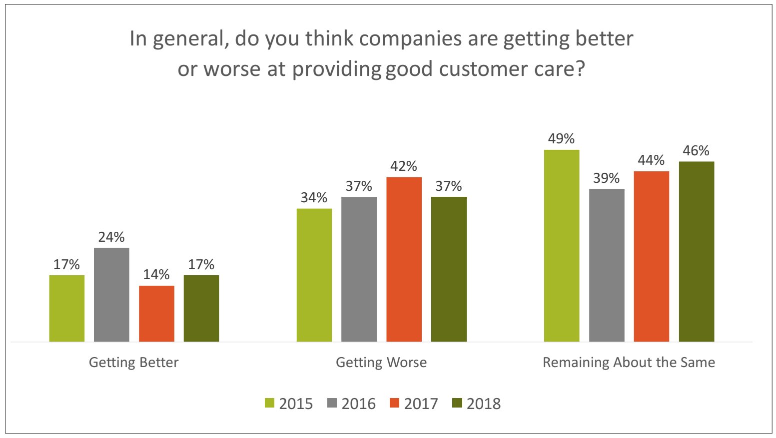
- Industry Perception
- Channel Preferences
- Interaction Preferences
- Customer Effect

Industry Perception

CONSUMER OPINION TOWARD CUSTOMER CARE AND CUSTOMER SATISFACTION BY CHANNEL

Consumer Opinion — Industry Perception

Although not dramatic, there was some slight year-over-year improvement when consumers were asked whether companies were getting better or worse at customer care. Not only was there a three-point improvement in the percentage of respondents that said care was getting better, there was also a five-point decline in the percentage that thought care was getting worse.

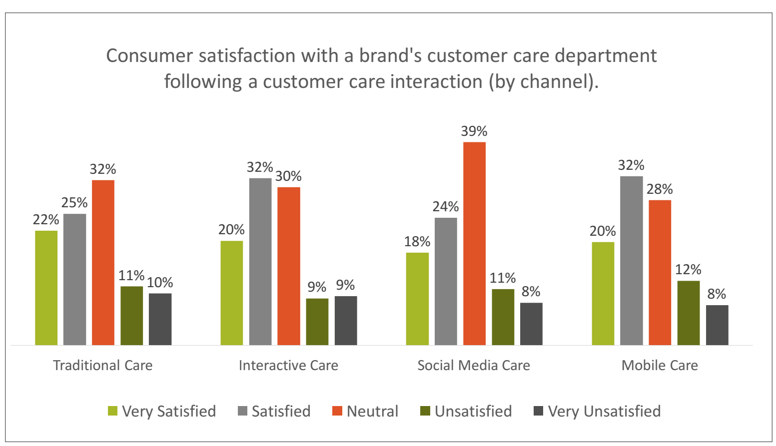


Do you feel the customer care departments of today's companies are generally meeting your customer service needs and expectations?

2018 — Yes: 39%
2017 — Yes: 40%
2016 — Yes: 41%
2015 — Yes: 33%
2014 — Yes: 22%

After two consecutive years of phenomenal improvement (2014-2016), results to the question at left have been flat. While the specific reasons for this are unclear, it could be that consumers have essentially reset their expectations following an era in which many brands put greater attention on their customers and the customer experience. At the same time, innovation leaders have been busy setting a very high bar for customer care. Now, more than ever before, brands need to figure out how to compete against not only their direct competitors but against any brand that can provide an exceptional experience and have an inevitable impact on expectations.

Across all channels, an average of 48% of survey respondents indicated they were either "Very Satisfied" or "Satisfied" following an interaction with a brand's customer care department. This precisely matches results from 2017, extending the notion hinted at in the results above — in the previous 12 months, brands have neither lost nor gained any ground with the consumer when it comes to care satisfaction.



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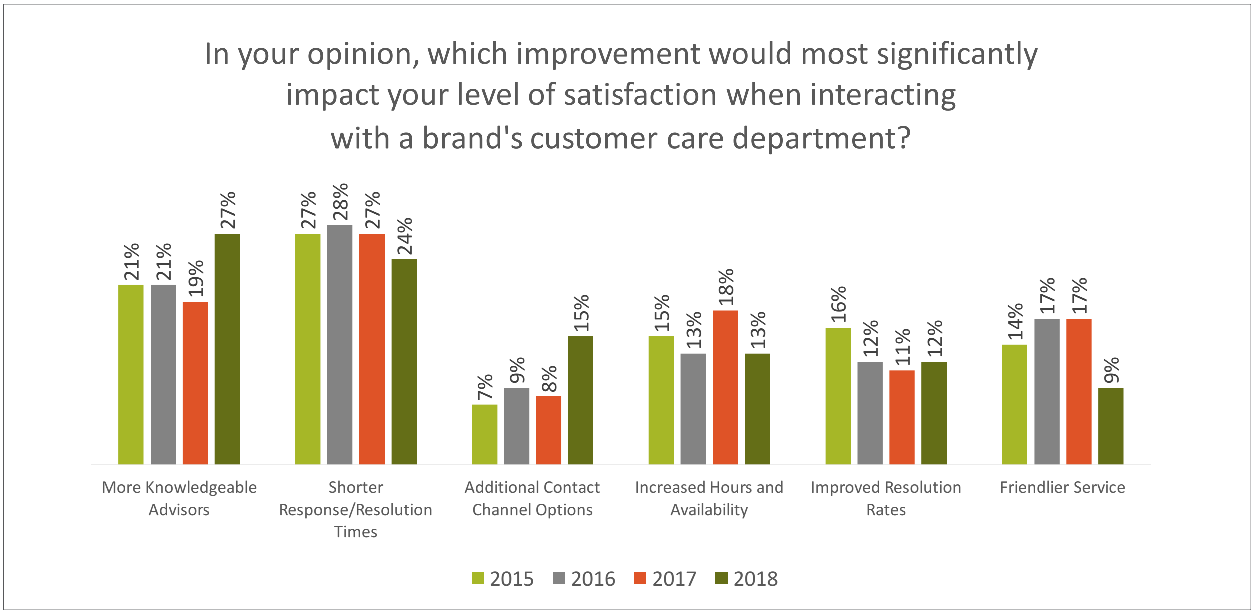
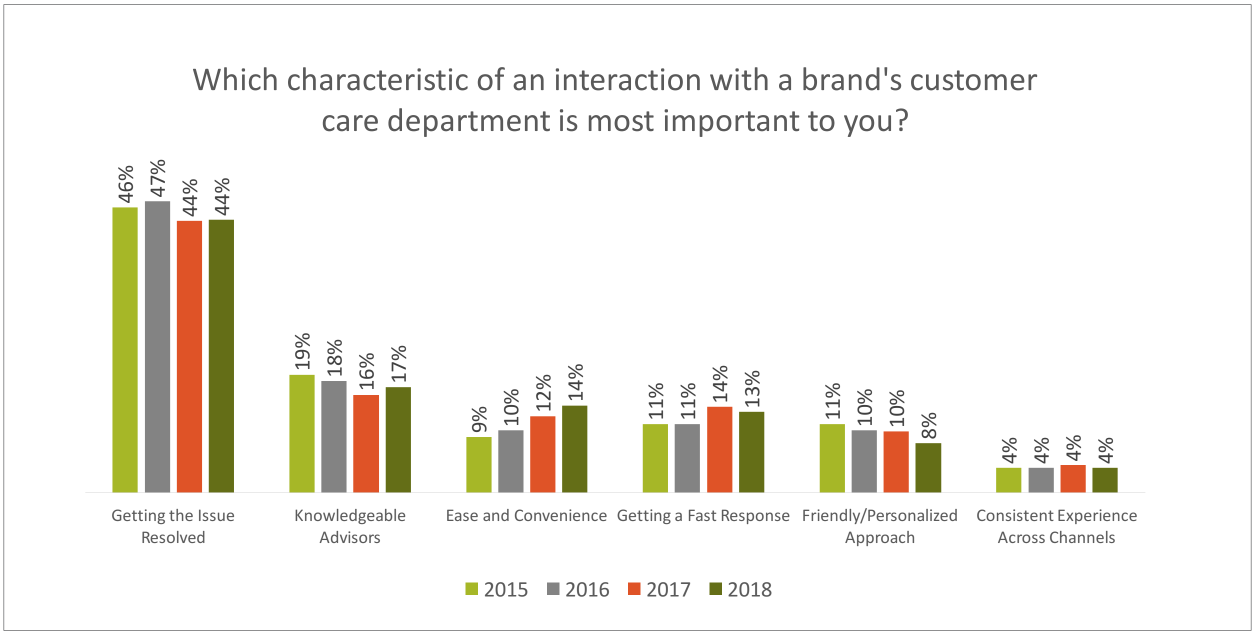
WHAT'S IMPORTANT, WHAT DRIVES SATISFACTION

Consumer Opinion — Industry Perception

When asked which improvement would have the biggest impact on satisfaction, respondents continued to pile into primarily two responses: "More Knowledgeable Advisors" and "Short Response/Resolution Times." In 2018, these responses ran neck and neck, accounting for more than half of all responses, with the agent-focused response gaining an edge for the first time in four years' worth of data. Given consumers also name knowledgeable advisors (bottom) as the most important characteristic of an interaction (outside of getting a resolution), it's safe to say that unknowledgeable agents can easily have an oversized (and negative) impact on customer satisfaction.



Aside from getting an issue resolved, which is of constant importance to consumers, "Knowledgeable Advisors," "Ease and Convenience" and "Getting a Fast Response" continue to round out what's most important to consumers. Worth noting is the trend in importance of "Ease and Convenience," up three consecutive years. As consumers experience fast and easy resolutions with leading brands, they grow to value the experience, expecting the same from all companies.



Methodology of 2018 CXMB Series results: Conducted by Google Consumer Surveys, May 2018 and based on an average sample size of 220 online responses. Sample: National Adult Internet Population. For more details, see the Methodology section. Copyright © 2018 Execs In The Know, LLC. All rights reserved.

HOW COMPANIES CAN DO BETTER, AND WHAT MATTERS OUTSIDE OF A RESOLUTION

Consumer Opinion — Industry Perception

In an open-ended question (below), survey respondents were adamant about four specific actions brands need to take to provide better customer care: reduce automation, provide greater access to live assistance, hire native English speakers and do a better job of listening to the customer. Several survey respondents pointed to a disconnect between the advisors providing support and the products/services that are the object of that support. Both automation and offshoring were indicated as the cause of this disconnect. Below is a word cloud of the 25 words that appeared most frequently in the responses received.

Verbatim responses to the above question:

"By actively listening and providing quality customer service."

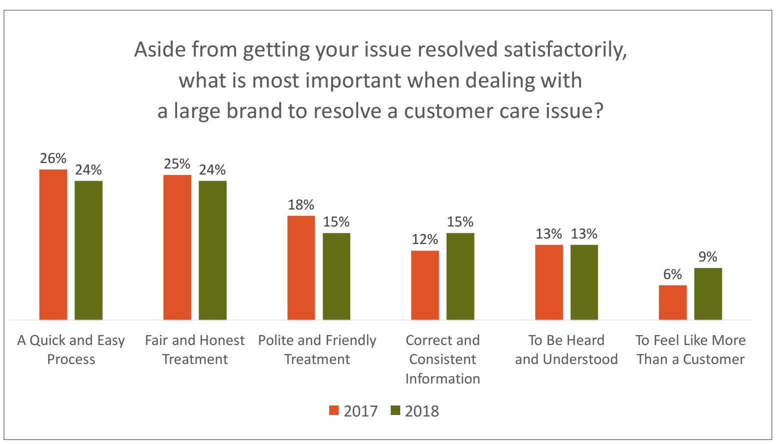
"Local customer care, not offshoring."

"Get rid of the stupid, universally hated voice response phone systems."

"Stop using people with poor English-speaking skills."

"Actually listen and not give answers from a script."

"Prompt responses to customers when problems arise."



In a question first asked last year, survey respondents continue to value "A Quick and Easy Process" and "Fair and Honest Treatment" above other aspects of care. "Polite and Friendly Treatment" also fell out of a strong third position in 2017 and is now on par with both "Correct and Consistent Information" and "To Be Heard and Understood."

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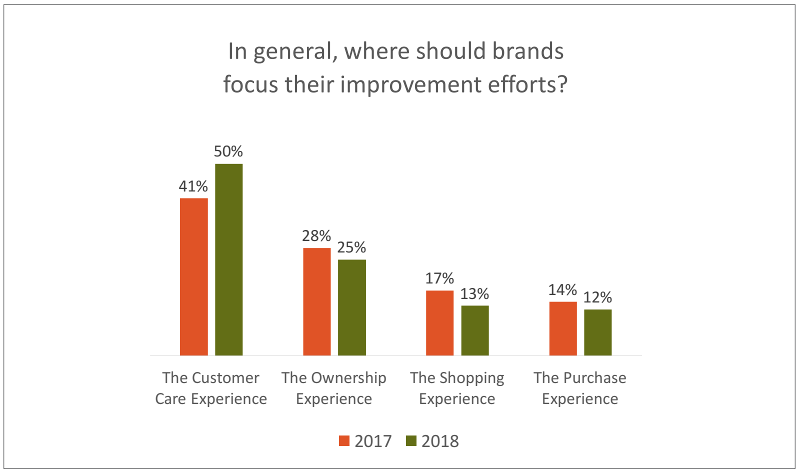
WHERE TO FOCUS, PAYING FOR BETTER SERVICE AND THE IMPORTANCE OF CARE

Consumer Opinion — Industry Perception

Last year brought the introduction of a new question aimed at understanding where customers thought brands could improve upon the wider customer experience. In comparison to 2017, an even larger percentage of respondents named "The Customer Experience" as the place where brands should improve. This result supports two powerful notions: 1) consumers value quality customer care; and 2) consumers feel brands have room to improve the customer care experience if they apply their efforts in that area.

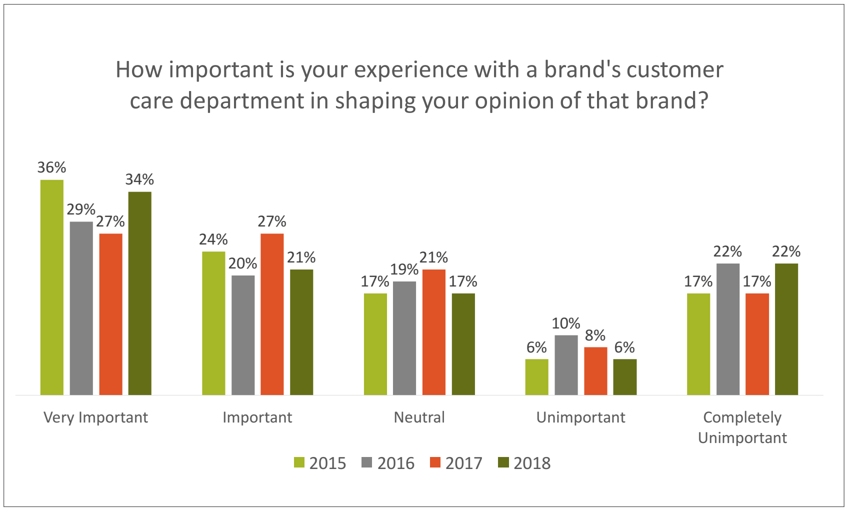


Would you be willing to pay a little more for a product or service if you knew you would receive world-class customer service as a result?

2018 — Yes: 51%
2017 — Yes: 60%
2016 — Yes: 58%
2015 — Yes: 46%
2014 — Yes: 48%

Though the 2018 result at left is lower than results from 2016 and 2017, half of all survey respondents would still be willing to pony up a little more money for a product or service if it meant better customer service. This, combined with the result above, clearly demonstrates how much consumers value the customer care experience. Undoubtedly, the value consumers place on exceptional care translates to just one thing for those brands that meet and exceed expectations: increased wallet share.

As with past years, the customer care experience continues to be an important factor in shaping brand opinion. Since the question at right was first asked in 2015, at least half of all respondents indicated that the customer care experience was either "Very Important" or "Important" in shaping brand opinion. And, as noted above, a good portion of consumers would even be willing to pay to get the care they feel they deserve.



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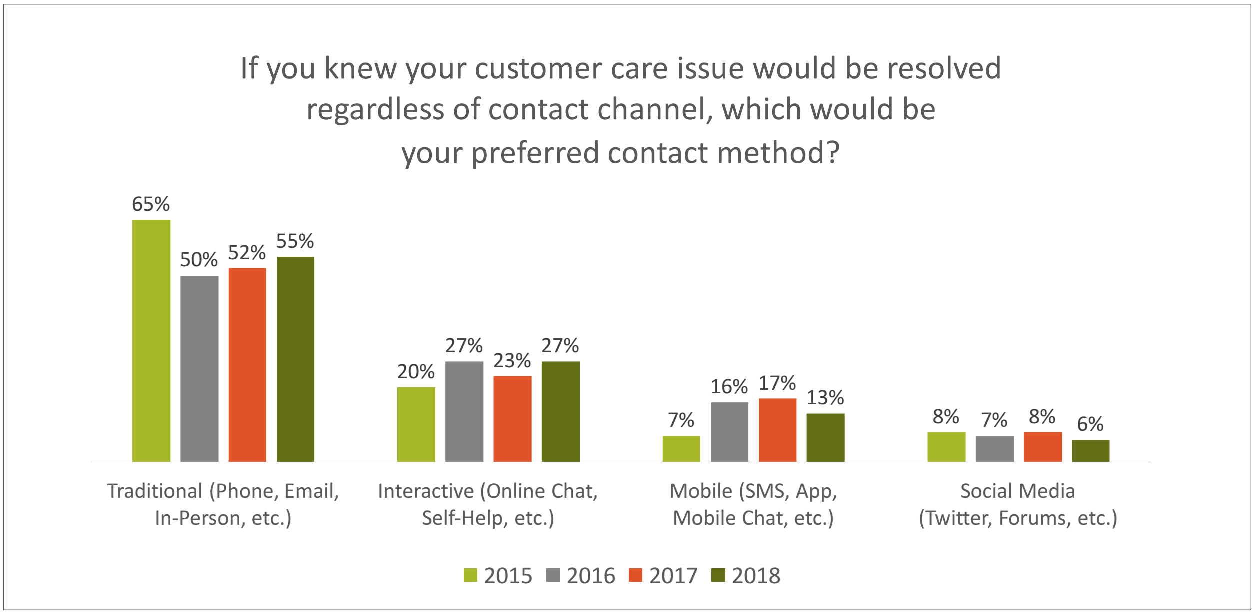
Channel Preferences

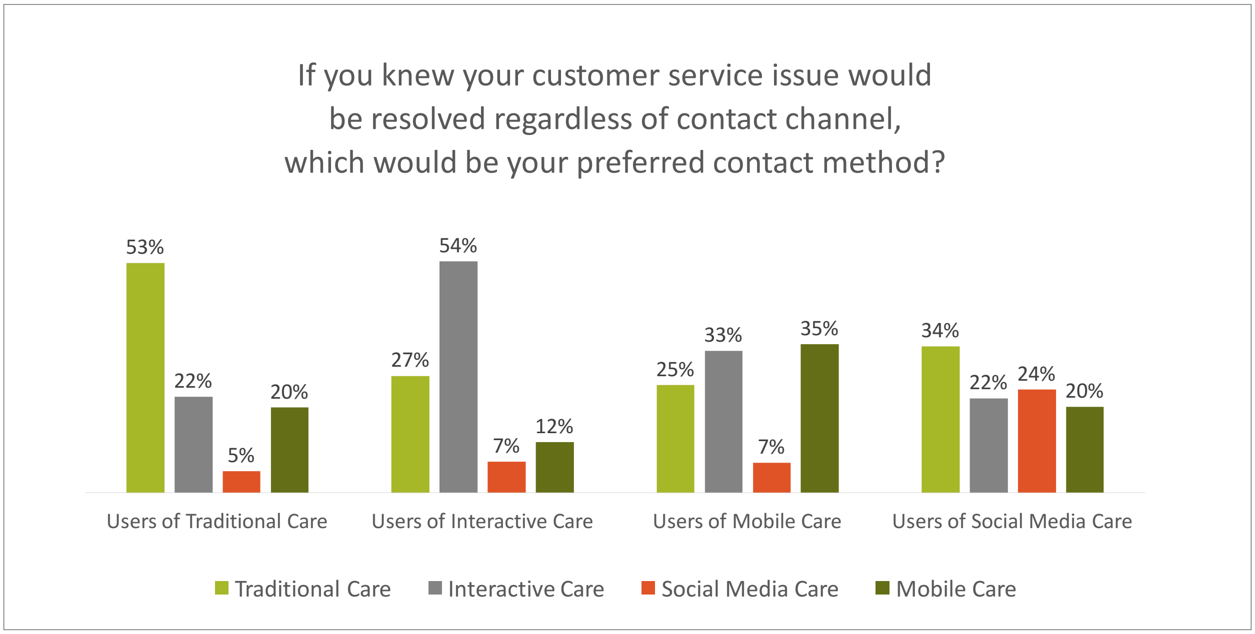
CHANNEL PREFERENCES

Consumer Opinion — Channel Preferences

Interactive Care was the big winner year-over-year when it comes to channel preference. In 2018, the channel took on a four-point bump, an increase of 17%. Traditional Care also increased slightly, up three points (+6%), while both Mobile and Social Media Care slid by four points (-24%) and two points (-25%), respectively. These results strongly mirror actual use rates, which can be found on page 11.



Among specific channel users, channel loyalty among Interactive Care users runs the highest, with 54% of Interactive Care users also naming the channel as their preferred contact method. This just edged out users of Traditional Care, of whom 53% also named Traditional Care as their most preferred contact method. Channel loyalty was the lowest among Social Media Care users, where only 24% of active users of Social Media Care also named that channel as their preferred contact method.



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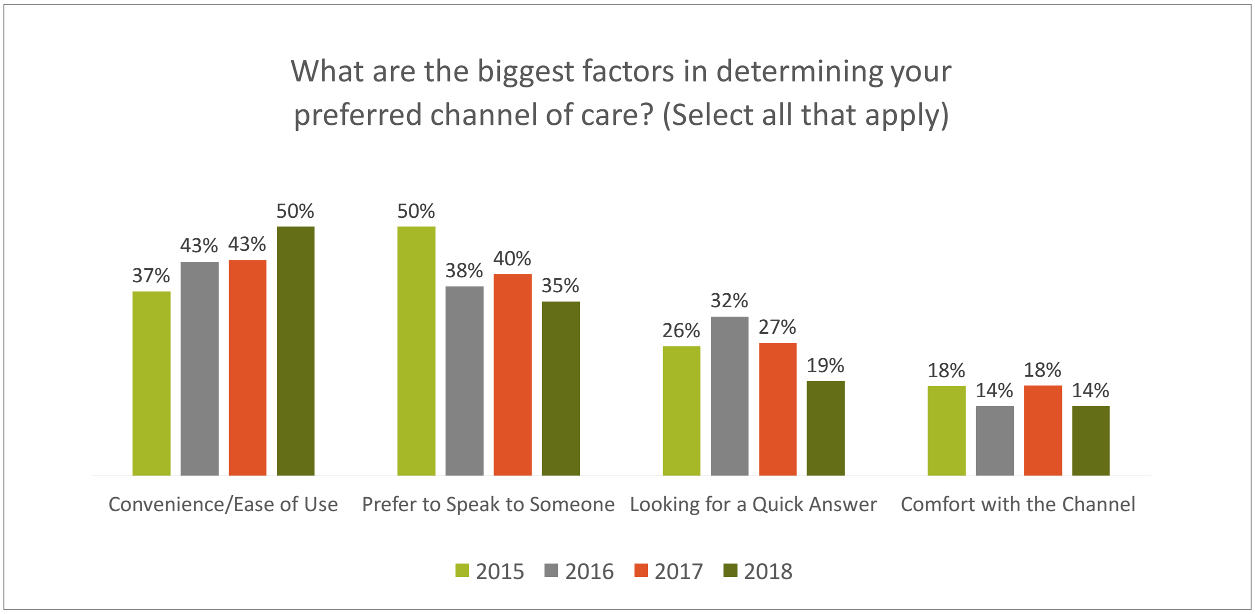
FACTORS FOR PREFERENCES AND PREFERENCE CHANGES

Consumer Opinion — Channel Preferences

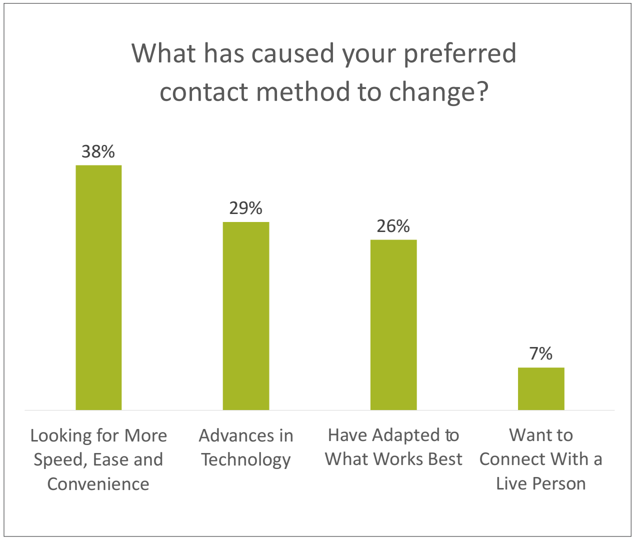
When asked what the biggest factor was in determining their channel preference, half of all respondents named “Convenience/Ease of Use.” Over the past four years, the rise in importance for convenient and easy solutions has nearly mirrored the decline in importance of speaking with someone. That’s not to downplay the importance consumers place on speaking with a live person, which continues to be a determining factor for channel selection among more than a third of all consumers.



In a pair of new questions, this year’s report explored channel preference changes and the cause of those changes. Better than one third of respondents indicated a change in their contact method preferences in recent years, with the largest portion of these individuals (38%) making the change in search of a faster, easier and more convenient solutions. This reinforces the result above and demonstrates that consumers will seek out what they value, even if it means moving from one solution to another.

Has your preferred contact method changed in recent years?

Yes: 38%



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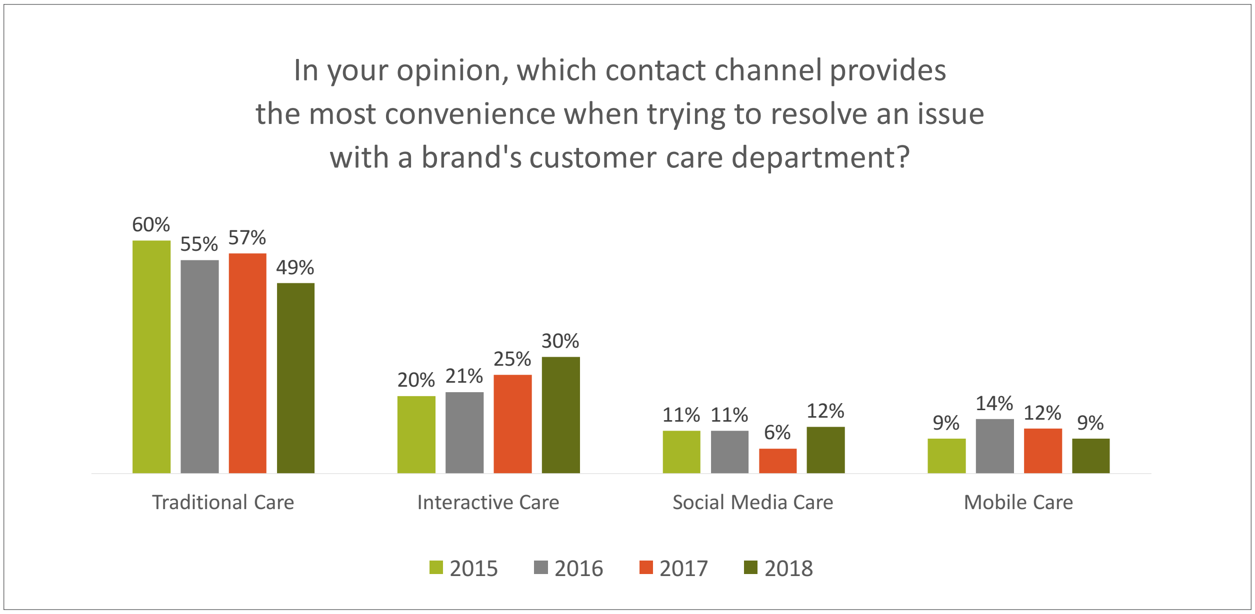
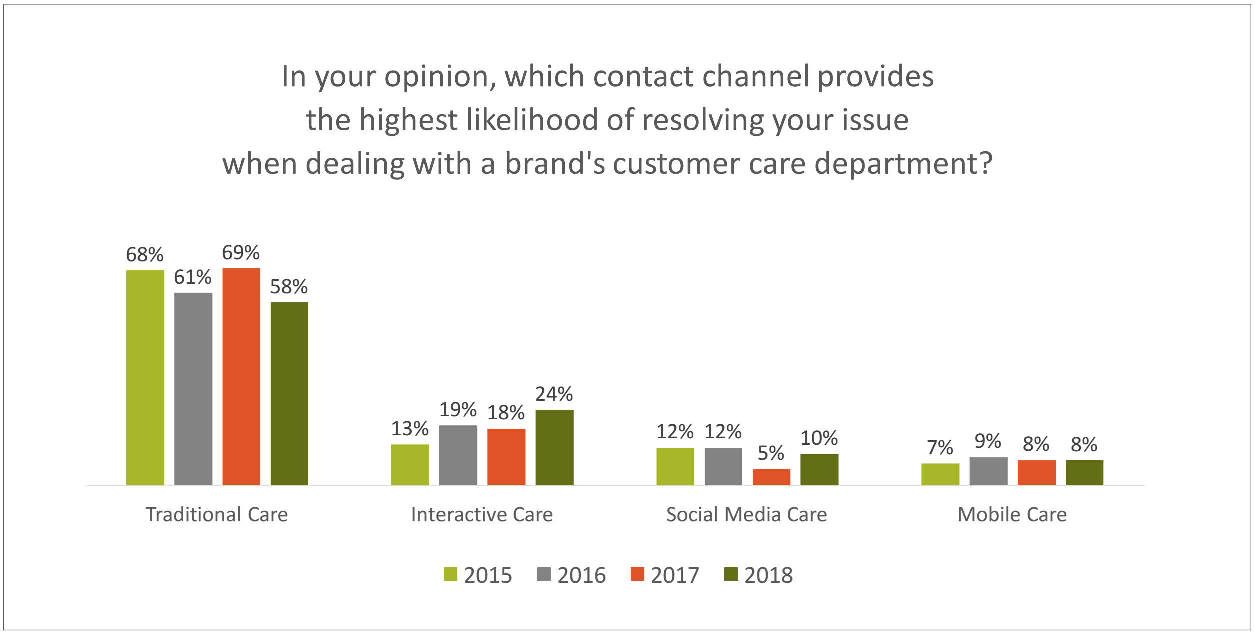
OPINIONS ON CHANNEL CONVENIENCE AND RESOLUTION CAPABILITIES

Consumer Opinion — Channel Preferences

For businesses looking to move their customers away from Traditional Care and into Interactive Care solutions like chat and self-help (i.e., chatbots), there's good news. More and more consumers continue to view Interactive Care as the more convenient option, while fewer feel the same way about Traditional Care. That said, about half of all consumers still see Traditional Care (mostly phone) as the most convenient option for resolving an issue. This likely has as much to do with actual experience as it does with perception, providing brands with a concrete mission to improve the access and convenience of specific solutions.



Although opinion toward Interactive Care improved significantly year-over-year (up six points, +33%), most consumers still point toward Traditional Care as the channel most likely to resolve their issues. For brands hoping to transition their customers away from Traditional Care and into online and/or self-help solutions, resolution capabilities remain one of the biggest sticking points. As demonstrated in the Multichannel section (page 17), consumers will go to where they can get results. As it stands, a Traditional Care solution is the last stop for nearly 60% of all multichannel engagements, while providing a resolution rate that exceeds all other channels.



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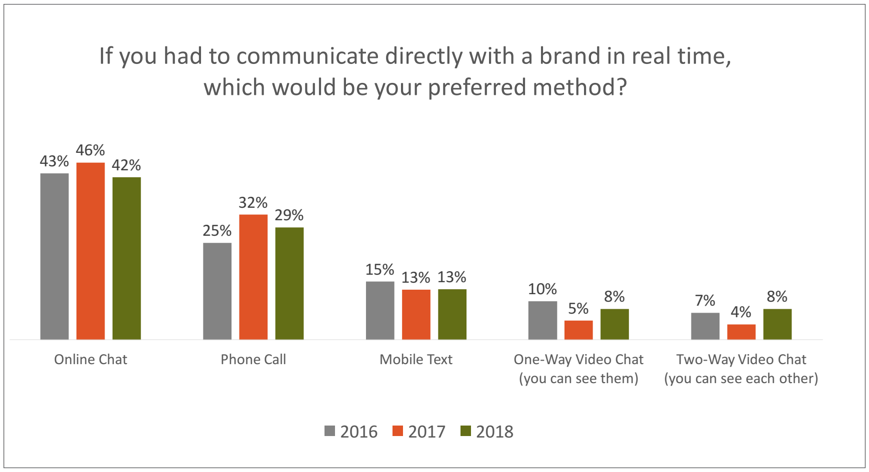
Interaction Preferences

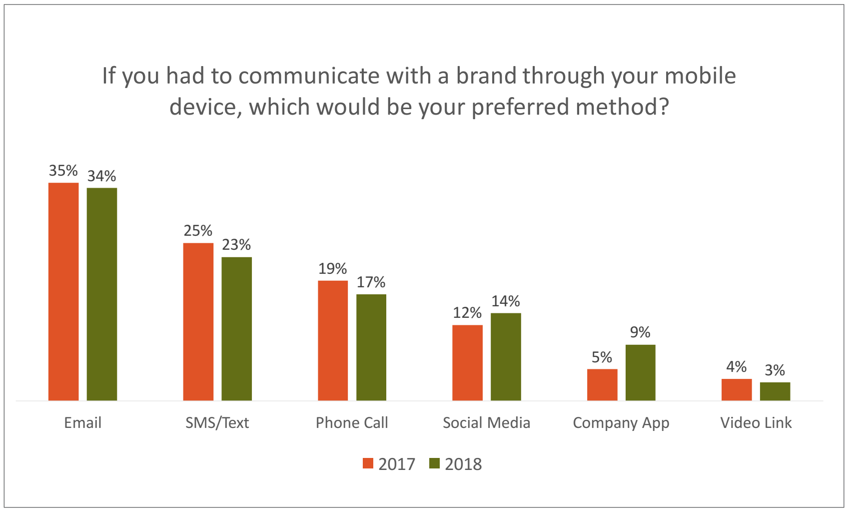
REAL-TIME, MOBILE DEVICE AND CALL PREFERENCES

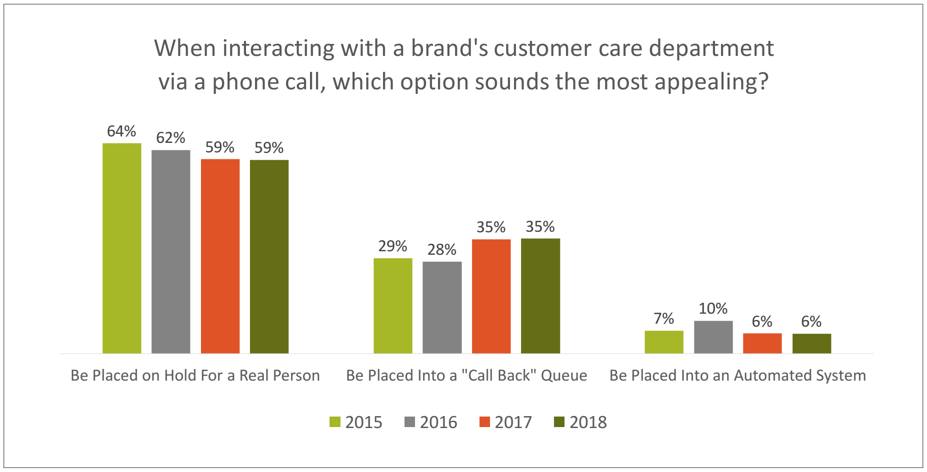
Consumer Opinion — Interaction Preferences



Online Chat remains the preferred real-time solution for the third straight year, continuing to beat out all other solutions, including phone. That said, preference should not be confused with actual use. In this regard, phone continues to dominate, as seen on page 11, most likely due to the resolution capabilities provided by the traditional contact center.

Extending results from 2017, Email continues to be top of mind for customers when it comes to their preferred mobile device communication solution. But, much like the above result, preference should not be confused with use. If brands want consumers to embrace their solution preferences, they'll need to bolster the resolution capabilities and ease of use of solutions like chat, email and SMS/Text.





Year-over-year, there was exactly no change in the responses received to the question at left. Very few consumers (six percent) would opt to be placed into an automated system, while about one-third would prefer to take a call-back. As for the balance, and the vast majority of consumers, they'd like to wait for a real person.

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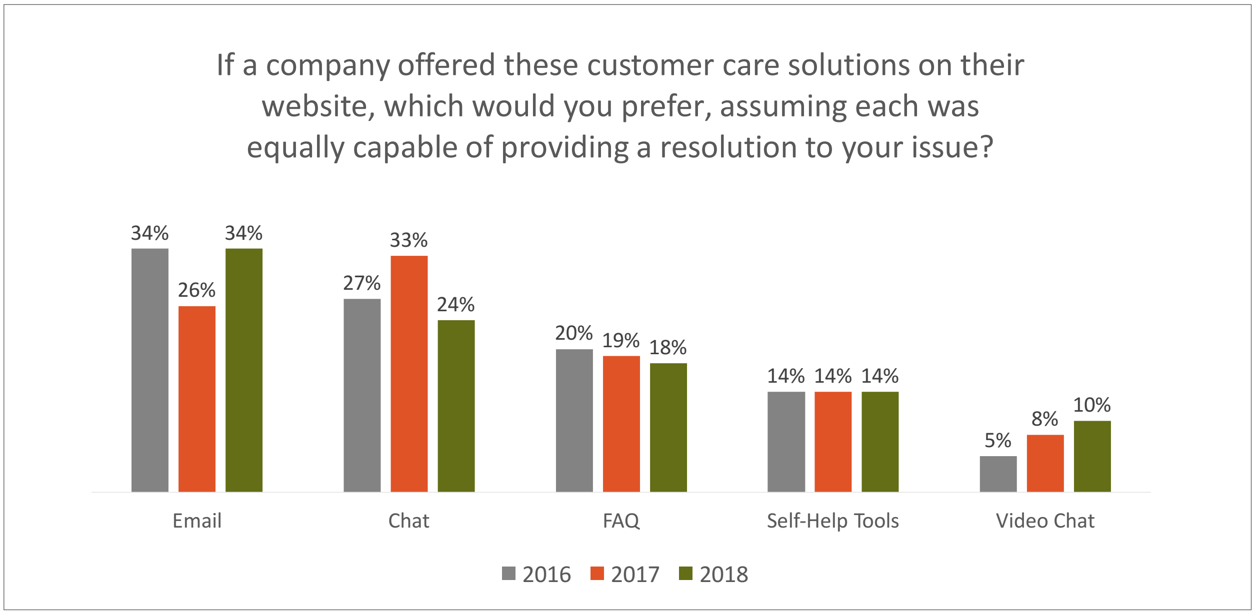
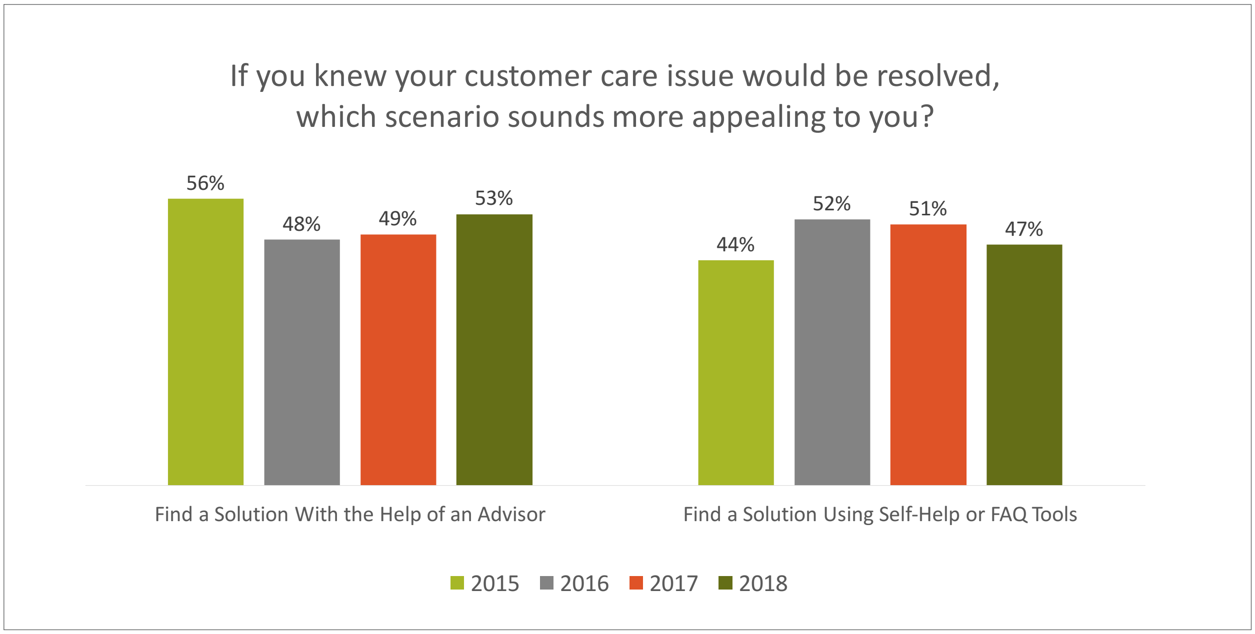
WEBSITE SOLUTIONS AND SELF-HELP VERSUS ASSISTED

Consumer Opinion — Interaction Preferences

When it comes to website-based care options, consumers flipped in 2018 (after also flipping from 2016 to 2017), with Email once again leading the way as the top option among respondents. As with other “preferences,” these results are not necessarily reflective of actual use, although this particular set of results strongly mirrors actual use results, as found on page 11.



In a question aimed strictly at users of Interactive Care solutions, preferences between assisted and unassisted solutions remain fairly balanced, with live support gaining a slight edge this year. An important aspect of this question is the assumption that the issue would be resolved. Based on an unassisted resolution rate result of 57% (page 27), these results are highly speculative, since such a high percentage of consumers aren’t actually getting their issues resolved by using an unassisted solution.



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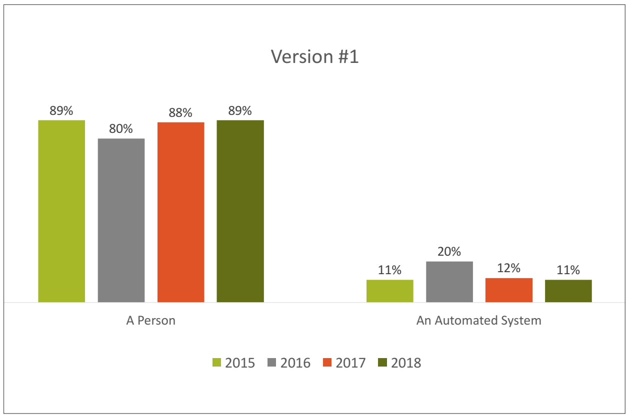
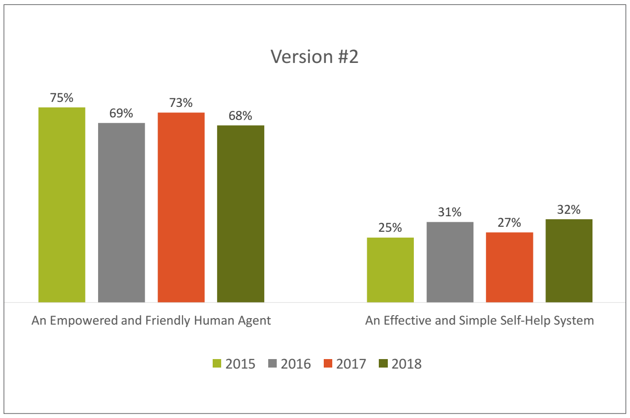
CONSUMER PREFERENCE FOR ASSISTED INTERACTIONS

Consumer Opinion — Interaction Preferences

In a question first asked in 2015, consumers by and large prefer live assistance over automated solutions. When the solutions are described in a little more detail, as in Version #2 of the question (below, right), consumers gravitate toward self-help solutions in moderately higher numbers. Still, consumers remain firmly planted in their preference for interacting with a person rather than an automated system.

In the event of a customer care issue, which would you rather interact with (assuming both are equally capable of resolving the issue)?

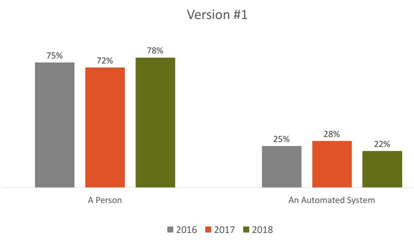


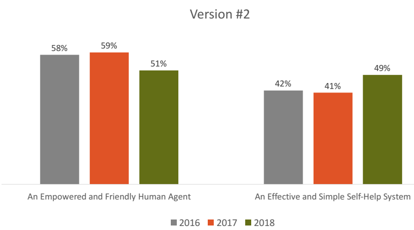


To further investigate the results of the above question, a series of modifications were devised describing the issue being resolved as either “routine,” “simple” or “complex.” Although these results are further evidence that most people prefer interacting with a live person versus an automated system when an issue arises, there is a pattern that, as issues become more complex, the desire to speak with a person becomes greater. So brands need to understand what types of issues are being handled and ensure the complex issues are reaching a person.

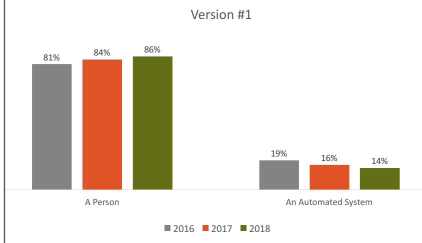
In the event of a (routine/simple/complex) customer care issue, which would you rather interact with (assuming both are equally capable of resolving the issue)?

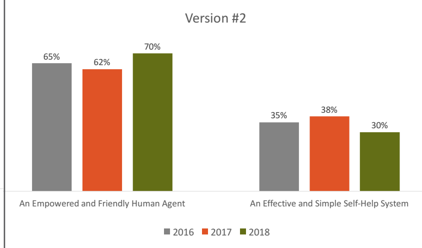
Routine Customer Care Issues



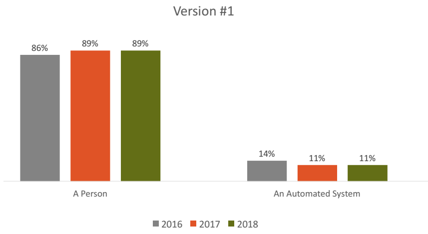


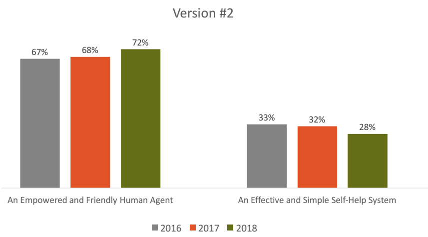
Simple Customer Care Issues





Complex Customer Care Issues





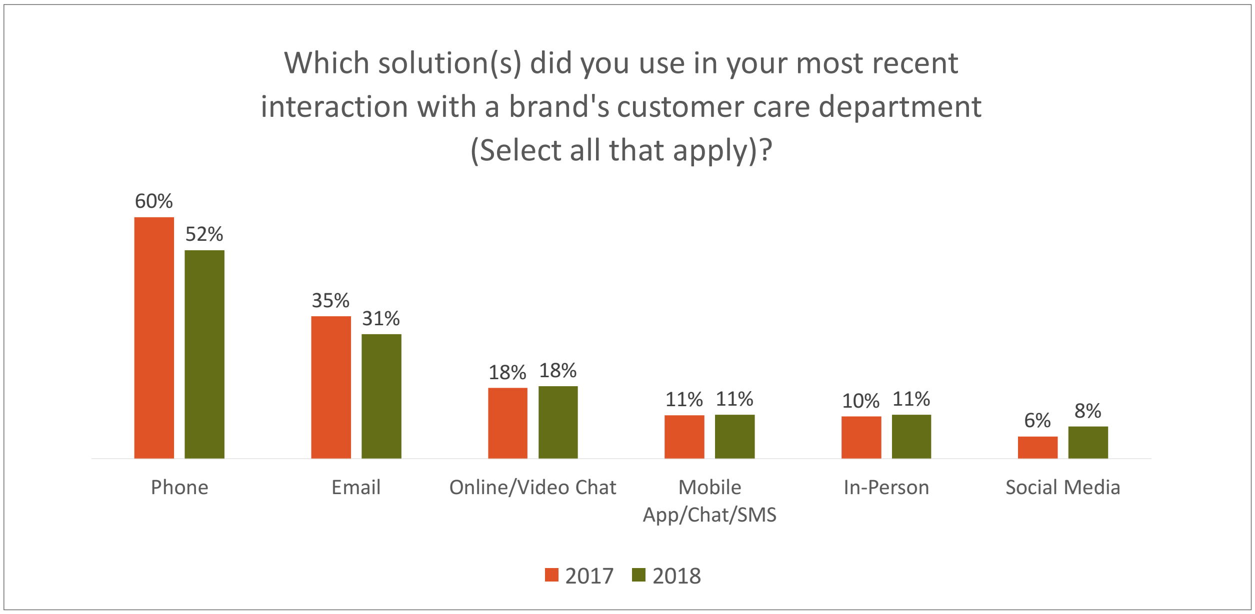
Methodology of 2018 CXMB Series results: Conducted by Google Consumer Surveys, May 2018 and based on an average sample size of 220 online responses. Sample: National Adult Internet Population. For more details, see the Methodology section. Copyright © 2018 Execs In The Know, LLC. All rights reserved.

Customer Effort

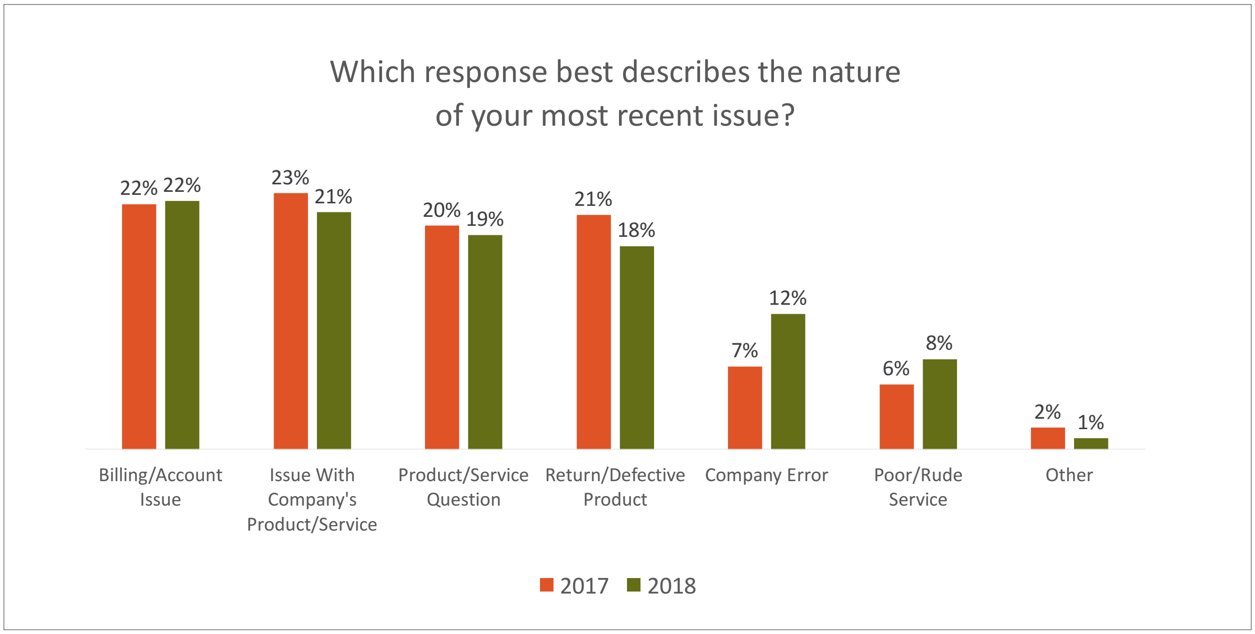
SOLUTION USE AND NATURE OF MOST RECENT ISSUE

Consumer Opinion — Customer Effort

This year's research continues an investigation of customer effort first launched last year. The mix of solutions used by this year's Customer Effort cohort is very similar to that from last year, with moderately fewer users of Phone and Email. The use patterns represented resemble the solution use habits of the general pubic (page 11), although Online/Video Chat and Email are especially underrepresented in this particular sampling.



Like 2017, this year's cohort was dealing with many of the same issues, with billing, product/service issues (defects/returns), and product/service questions leading the way. There were also upticks in issues related to company errors and poor/rude service. These types of issues remain fairly uncommon, though are worth tracking year-over-year. Understanding which types of issues customers are having is a critical first step in remedying systematic issues.



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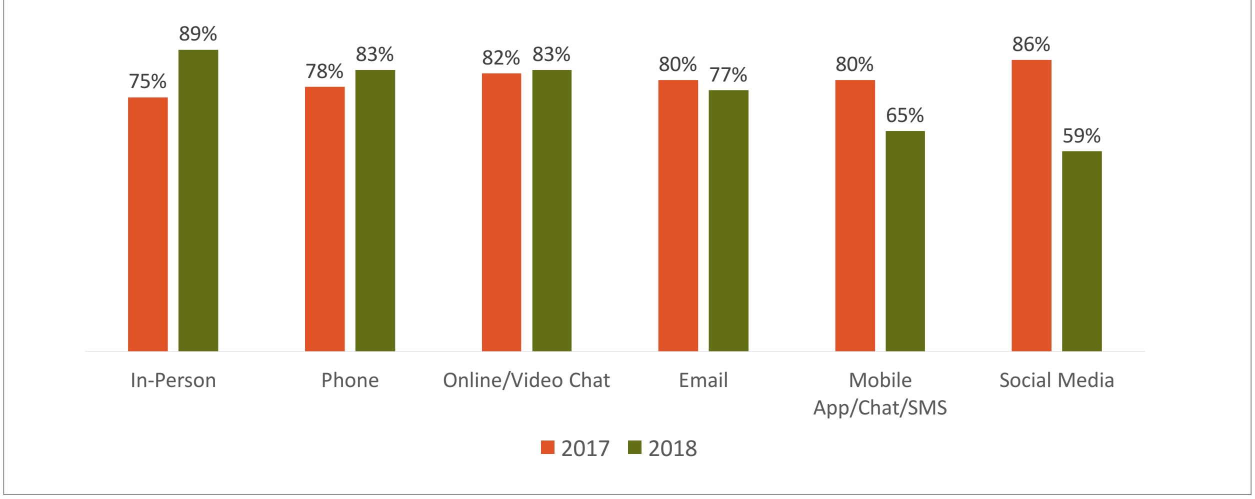
RESOLUTION RATES (ALSO BY SOLUTION) AND POSITIVITY OF EXPERIENCE

Consumer Opinion — Customer Effort

Across all solutions, 79% of respondents were able to resolve their issue. This is a blended average and is similar to the resolution rate observed for multichannel interactions (page 20). Last year's Customer Effort cohort had especially high resolution rates across channels, particularly for Mobile and Social Media Care solutions (below). This year's results more closely represent the norms for these particular channels.

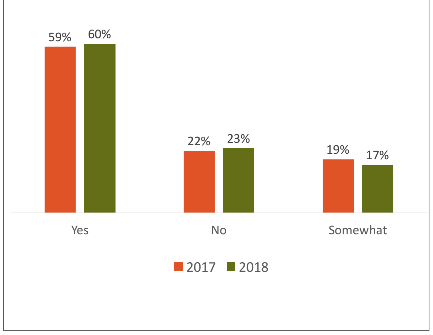
Was your issue resolved?

2018 — Yes: 79%
2017 — Yes: 79%

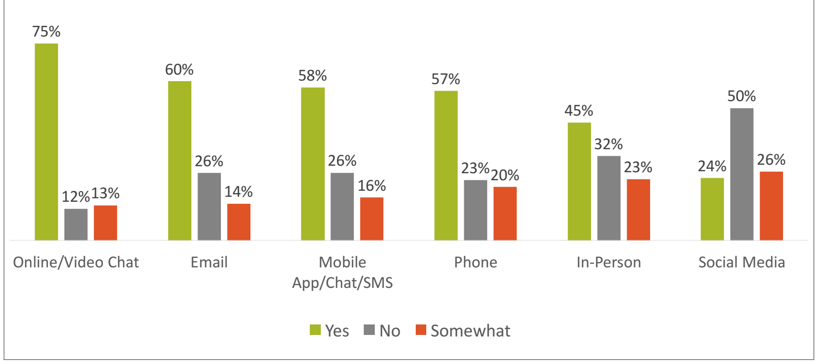


Resolution Rate By Solution Most Recently Used

Regarding whether or not an interaction was a positive experience, the overall results this year nearly matched those of 2017. Among individual solutions, results were also remarkably similar, with one exception: social media. In 2017, 63% of social media users reported the experience to be positive, compared to just 24% in 2018. That said, it's worth noting that social media users make up only a small portion of the whole. This year, social media users totaled 20 among the total sample of 247 individuals. Still, this result is further evidence of a channel in transition.



Did you find your interaction with the brand to be a positive experience?

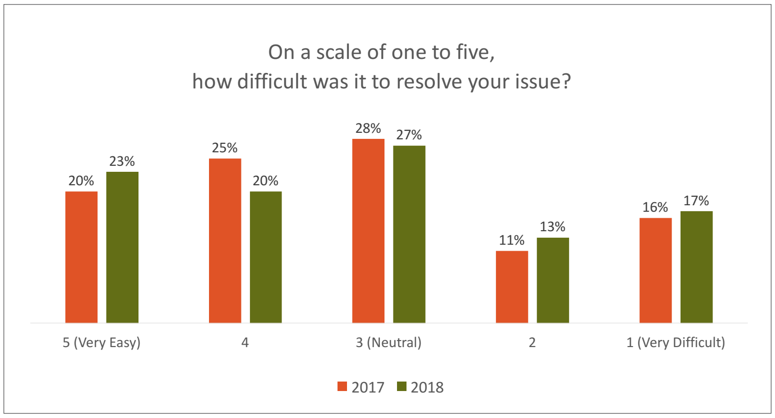


Whether Consumers Found the Experience to be Positive By Solution Most Recently Used

Methodology of 2018 CXMB Series results: Conducted by Google Consumer Surveys, May 2018 and based on an average sample size of 220 online responses. Sample: National Adult Internet Population. For more details, see the Methodology section. Copyright © 2018 Execs In The Know, LLC. All rights reserved.

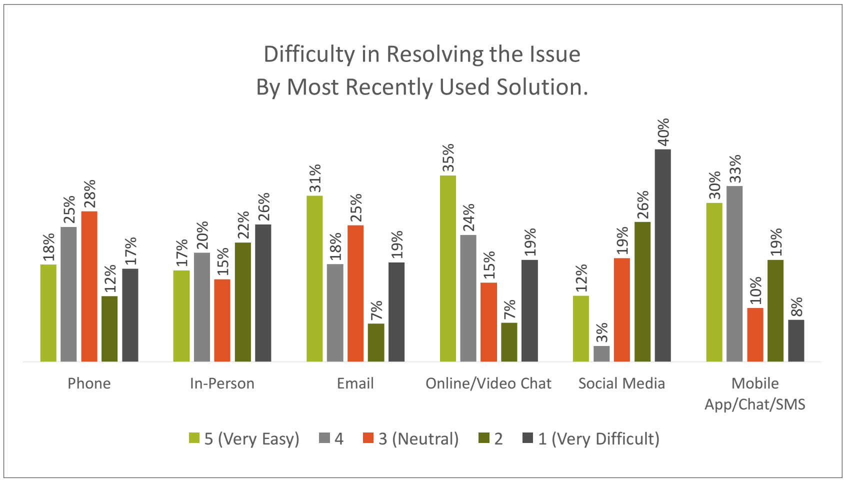
GETTING A RESOLUTION AND RESOLUTION RATE USING PREFERRED CONTACT SOLUTION

Consumer Opinion — Customer Effort



Resolution ease remained similar year-over-year, with 43% indicating a resolution was "Very Easy" or "Easy" compared to 45% in 2017. Over the last several years, ease has played an increasingly important role in determining the channel preferences of consumers (page 39).

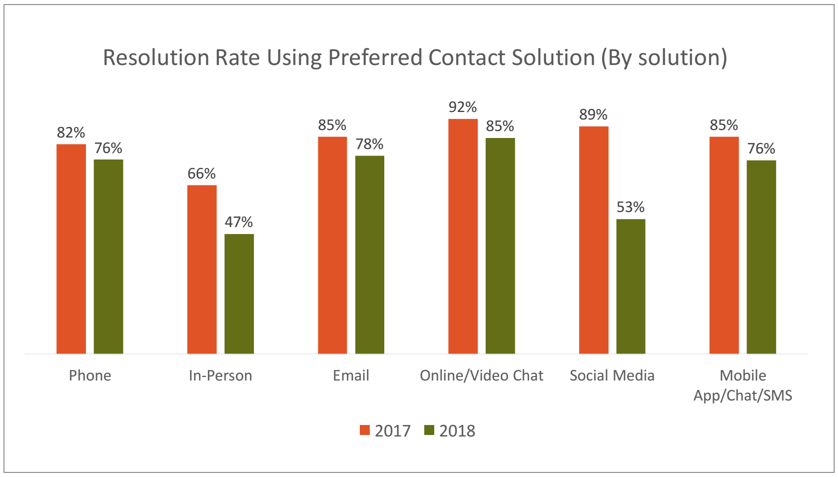
Among this year's survey respondents, Online/Video Chat and Mobile solutions provided the highest level of ease, while Social Media provided the lowest level of ease. Brands should seek to understand what sorts of issues are creating difficulty in reaching a resolution, particularly among solutions like In-Person and Social Media where there is lots of opportunity for improvement.



Do you feel you were able to resolve the issue using your preferred contact method (e.g., phone, email, etc.)?

2018 — Yes: 76%   2017 — Yes: 84%

In 2018, resolution rates among survey respondents fell by eight points, equating to an 11% drop compared to last year's results. Specific solutions that were hardest hit by the decline include In-Person (down 19 points, -29%) and Social Media (down 36 points, -40%). In research exploring what's most important to customers when it comes to interacting with a brand to resolve an issue (page 34), "Getting the Issue Resolved" is overwhelmingly the most popular answer, with 44% of respondents selecting the answer in 2018. Any drop in resolution rate is not good.



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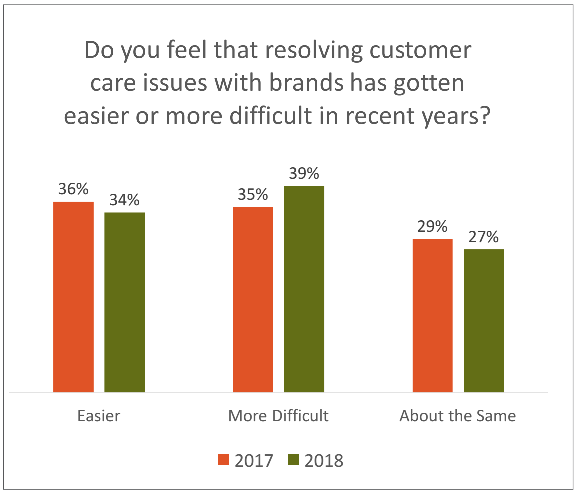
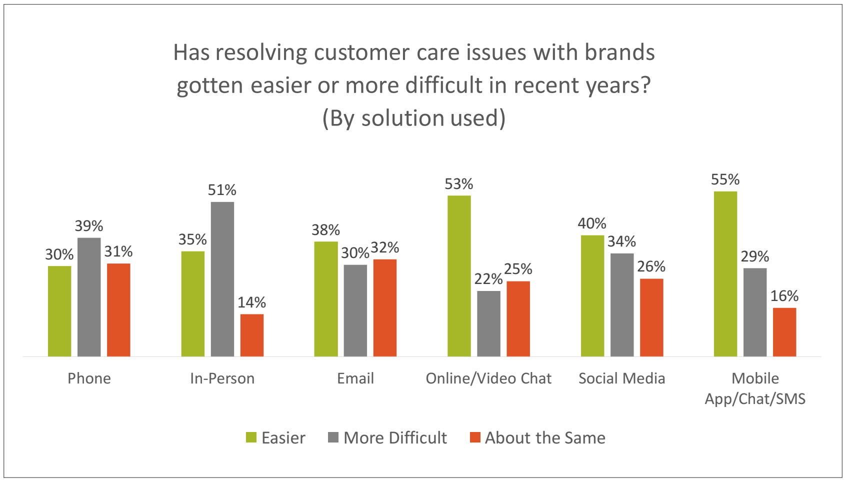
HOW PERCEPTION OF CUSTOMER CARE IS CHANGING (ALSO BY SOLUTION USED)

Consumer Opinion — Customer Effort

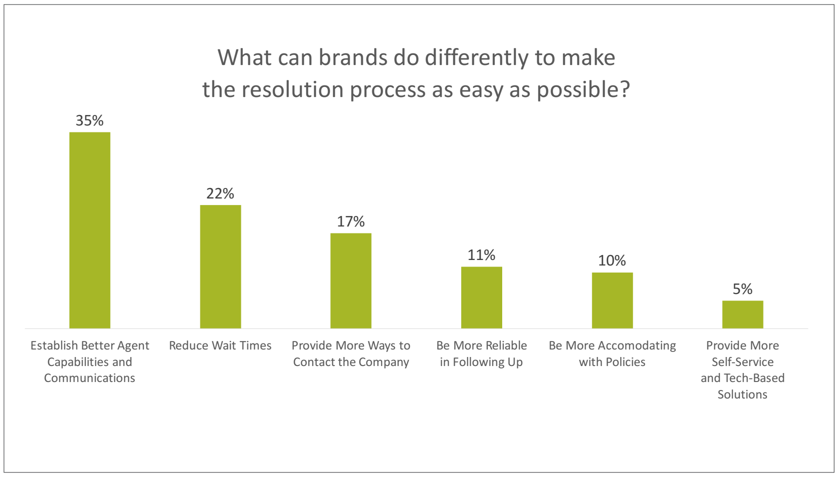
The percentage of survey respondents indicating that resolving customer care issues has gotten more difficult rose slightly year-over-year, increasing by four points, or 11%, while those saying it has gotten easier fell by two points, down six percent. While not a drastic change, it extends findings from other areas of this report suggesting customer care has generally been unable to move the needle on improving the overall customer experience in 2018.





In breaking down the above response by solutions used, Online/Video Chat registered the most positive results, with the majority of respondents (53%) claiming issue resolution has gotten easier in recent years. On the flip side, users of In-Person solutions provided the most negative set of responses, with only 35% indicating resolutions have gotten easier compared to 51% who said they have gotten more difficult.

In an entirely new question, survey respondents were asked what brands could do differently to make the resolution process as easy as possible. The primary response received revolved around improving agent skills, i.e., capabilities and communication. In a previous open-ended question about improving care (page 35), many respondents specifically cited poor listening and English skills as areas in great need of improvement.



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CONSUMER OPINION CONCLUSIONS

Key Findings:

- For the second year in a row, there has been no improvement in the percentage of consumers who feel brands are generally meeting their customer care needs and expectations (page 33).

- Consumers continue to cite offshoring, poor listening skills and automation in place of live assistance as major sources of care dissatisfaction (page 35).

- Perception of Interactive Care (i.e., online chat) as a channel of convenience continues to grow, with 30% of respondents naming it as the most convenient channel of care in 2018, up from 20% in 2015 (page 40).

- Survey respondents continue to favor live assistance over self-help options regardless of issue complexity, though this preference increases for issues with greater complexity (page 44).

For the second year in a row, the general perception of customer care has failed to improve, with only 39% of respondents indicating that the customer care departments of today's brands are generally meeting their needs and expectations. While the data doesn't indicate the exact cause of this, potential suspects include heightened expectations, lack of innovation, an over-reliance on automation and ineffective/ apathetic agents.

On the plus side, perception of Interactive Care continues to improve, both in terms of the convenience it can provide and in the channel's ability to provide a resolution. As more brands make the shift to greater automation and reliance on AI-powered solutions becomes the norm, it's inevitable that the experience of using such solutions will improve. This is bound to have an effect on how consumer expectations evolve.

Critical Questions Brands Should be Asking Themselves

Do we truly understand the needs and expectations of our customers, and are we making big enough strides to exceed these?

Are we taking a close enough look at all of our service journeys to understand where the gaps are, and are we addressing those gaps with our customer in mind?

Are we innovators or laggards when it comes to creating a unique and exceptional customer care experience?

Are we providing access to live assistance, and, if not, are our automated solutions as effective and easy to use as we think them to be?

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Channel Results

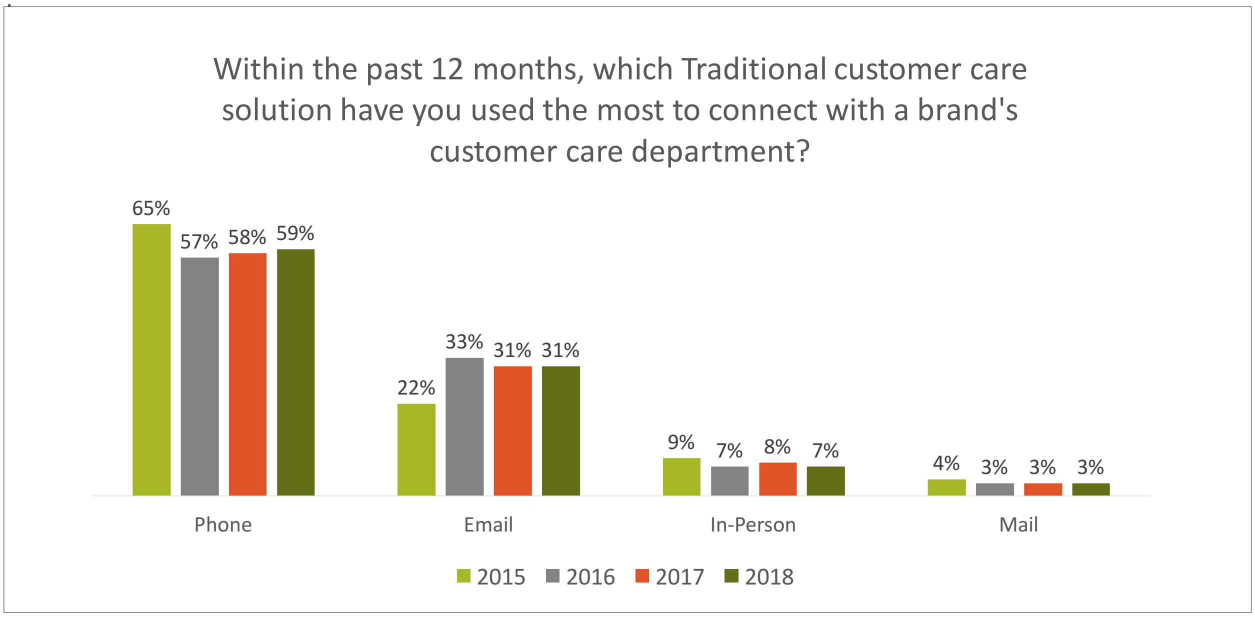
- Traditional Care
- Interactive Care
- Social Media Care
- Mobile Care

Traditional Care

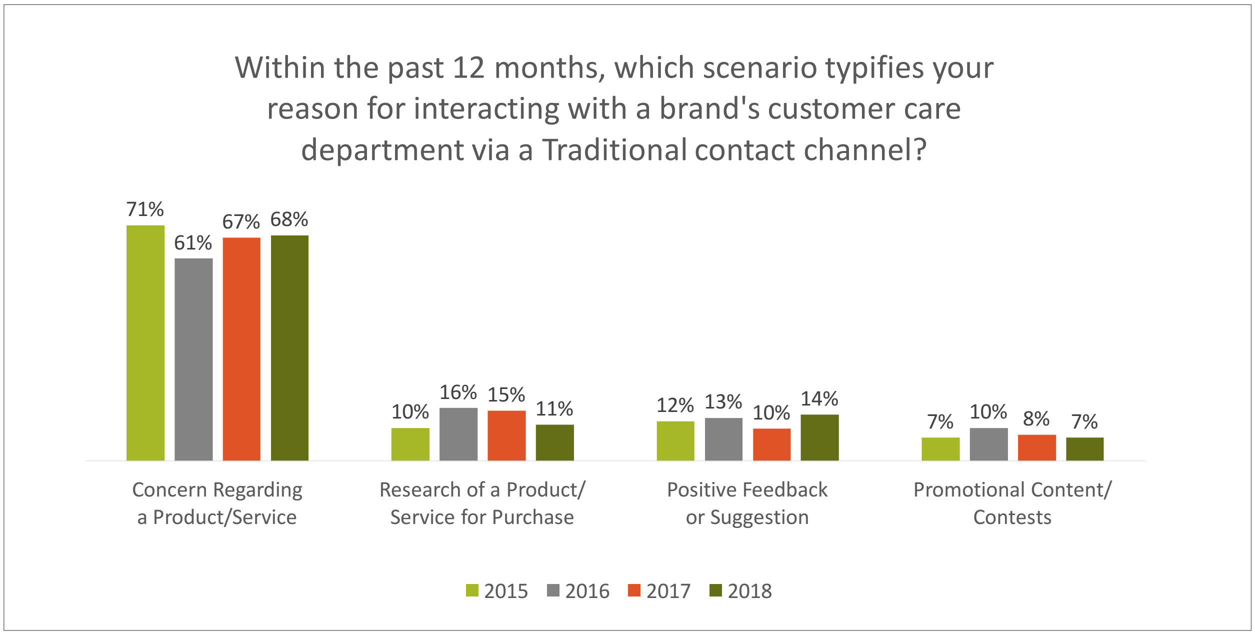
SOLUTIONS MOST USED AND REASON FOR INTERACTION

Channel Results — Traditional Care

Across all Traditional Care solutions, there was virtually no change year-over-year in which solutions are used most. Phone continues to dominate the channel, used most by nearly 60% of respondents. Phone is followed by Email, which is used the most by about half as many individuals as Phone. These two solutions alone comprise 90% of the solutions most often used by consumers and are also responsible for the vast majority of all volume that passes through the Traditional Care channel.



Traditional Care continues to serve as the primary channel for issue resolution, with 68% of users naming “Concern Regarding a Product/Service” as their typical reason for usage. This compares with 58% of Interactive Care users, 33% of Social Media Care users and 58% of Mobile Care users. This result stresses the ongoing importance of Traditional Care in resolving the lion’s share of customer care issues that occur today.



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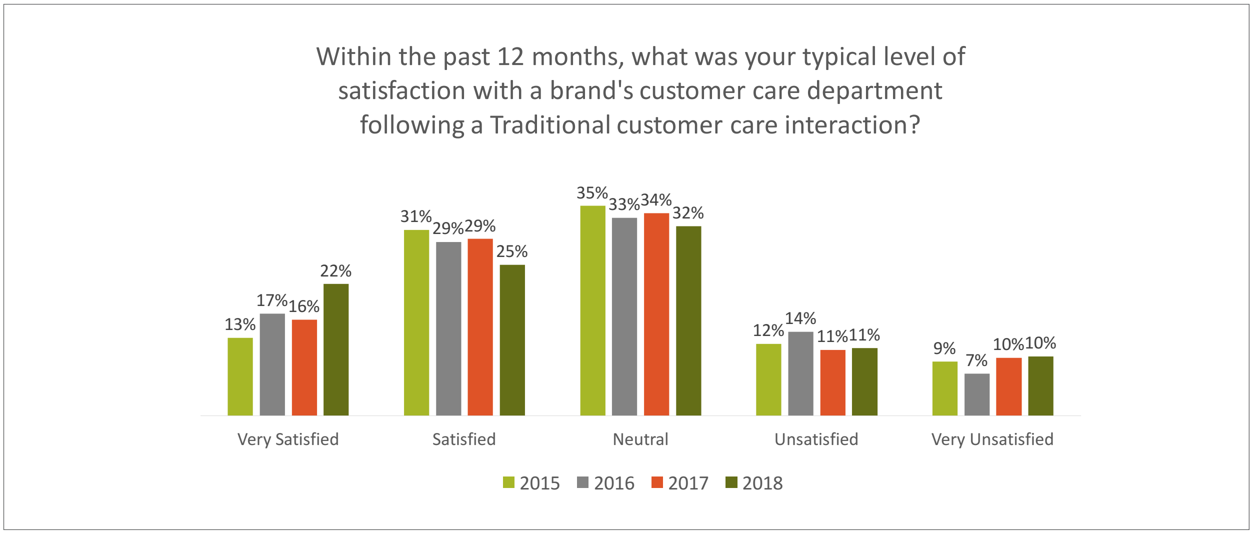
CHANNEL SATISFACTION AND CHARACTERISTIC OF MOST IMPORTANCE

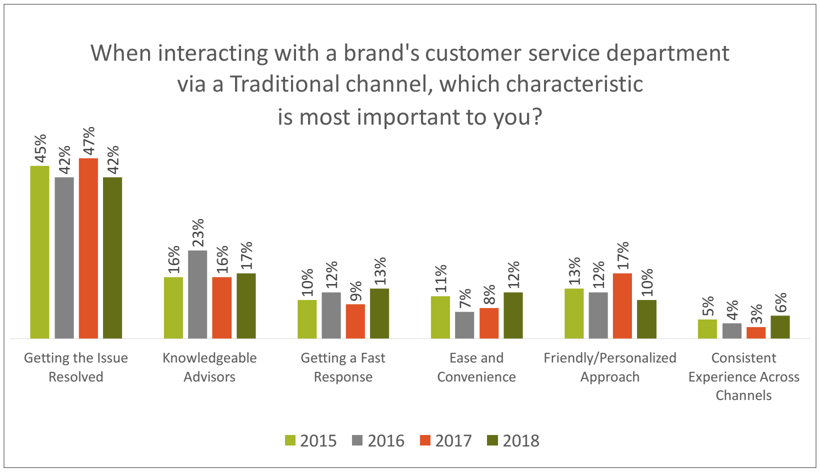
Channel Results — Traditional Care

Satisfaction within the Traditional Care channel improved slightly year-over-year, with 22% indicating they were "Very Satisfied" with the typical Traditional Care interaction, the highest seen in CXMB Series results. At the opposite end of the spectrum, the percentage of respondents indicating they were "Unsatisfied" or "Very Unsatisfied" with the typical experience remained unchanged at a combined 21%. With one-fifth of customers left dissatisfied, brands should strive to understand what's going wrong, and take measures to fix shortcomings.



WHAT CAUSED YOU TO RATE YOUR LEVEL OF SATISFACTION AS YOU HAVE?

"They didn't fix my problem."
"Amount of time to reach a 'real' person."
"Lack of ability to answer questions."
"Seemed as if they were following a script."
"They just kept passing the buck."



Simply getting the issue resolved remains of critical importance to users of the Traditional Care channel, with 42% of respondents naming issue resolution as the most important characteristic of an interaction. This result was also reflected in the responses received to the open-ended question above. When individuals were "Very Satisfied" or "Satisfied," responses usually revolved around getting a quick resolution, whereas when customers were "Unsatisfied" or "Very Unsatisfied," the culprit was usually due to a lack of resolution.

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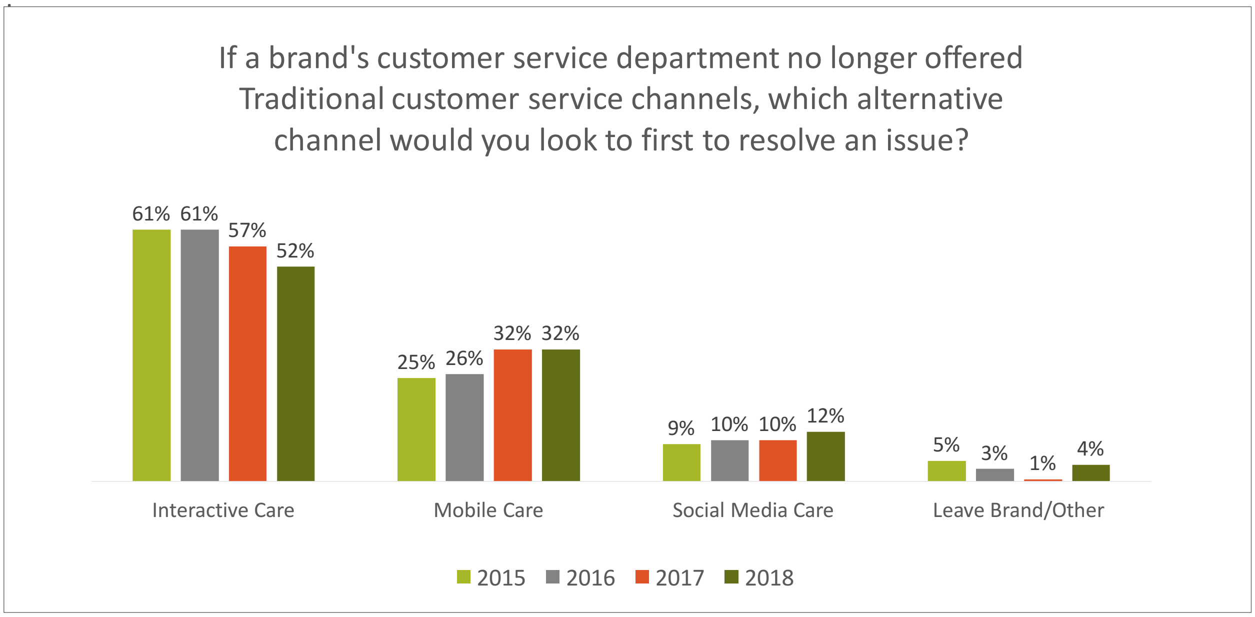
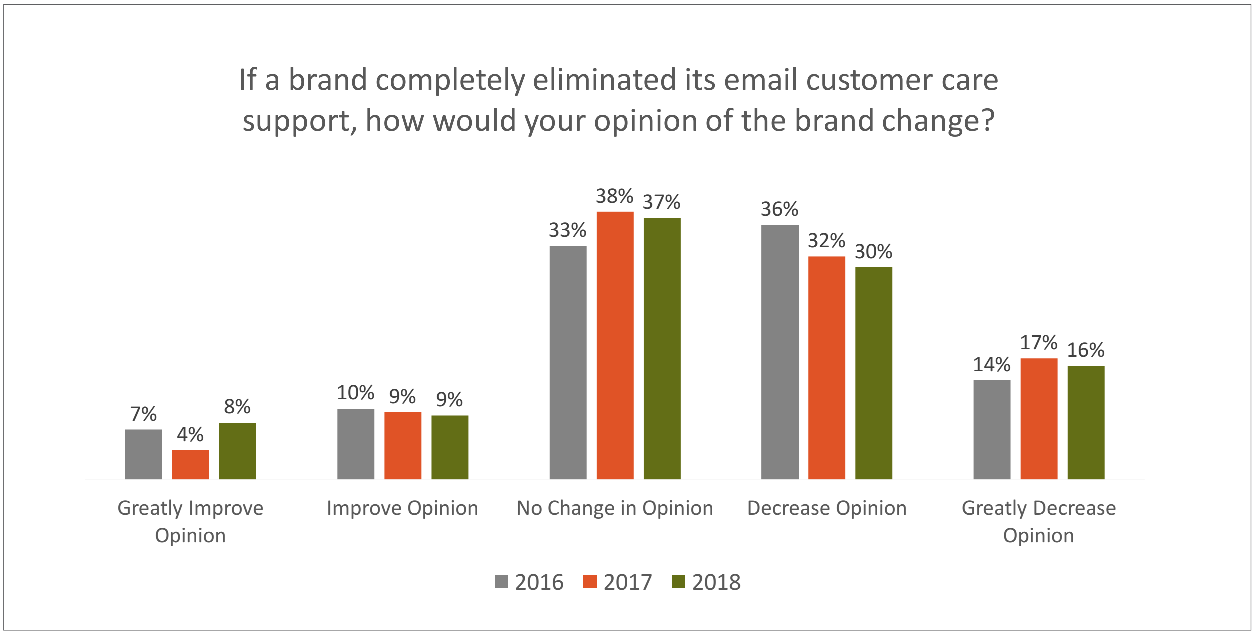
CHANNEL PREFERENCE OUTSIDE OF TRADITIONAL CARE AND SUPPORT FOR EMAIL

Channel Results — Traditional Care

For the second year in a row, Interactive Care lost some ground as the go-to channel for consumers in the event that Traditional Care was no longer available. Even still, it ranks far above Mobile (and even more so above Social Media Care) as the channel consumers would most likely rely on absent the option of phone, email and in-person. And although Interactive Care can't exactly replace Traditional Care at this stage, these results provide some solid insight into where customers might be headed absent traditional avenues of customer care.



From the perspective of consumers, elimination of email support would result in a mostly negative outcome for brand opinion. Consumers have been consistent in their position since the question below was first asked in 2016. In 2018, only 17% of respondents indicated a positive impact on brand opinion, while 46% indicated a negative impact. For whatever reason, it's clear that consumers continue to value the quality and capabilities of email support.



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Interactive Care

SOLUTIONS MOST USED AND REASON FOR INTERACTION

Channel Results — Interaction Care

Online Chat remains the predominate Interactive Care solution, with 55% of Interactive Care users naming the solution as the one they use most often. Online FAQ remains the second most used Interactive Care solution, although its position has slipped considerably since 2015, moving from 29% to 22%, a seven-point move that translates into a decline of 24%.

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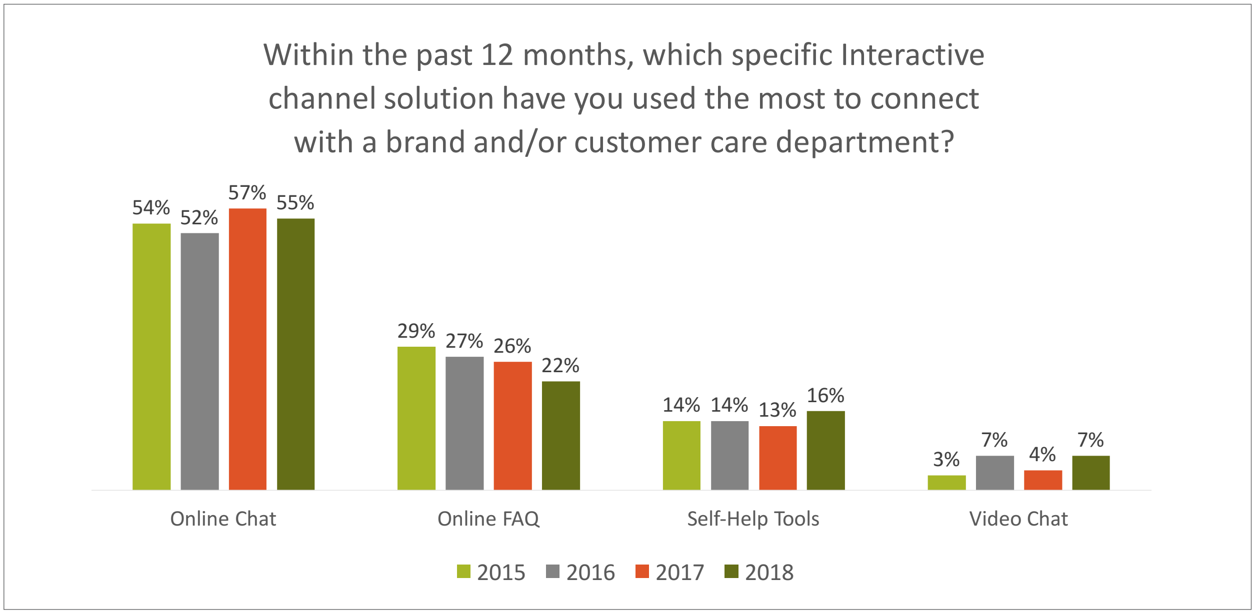
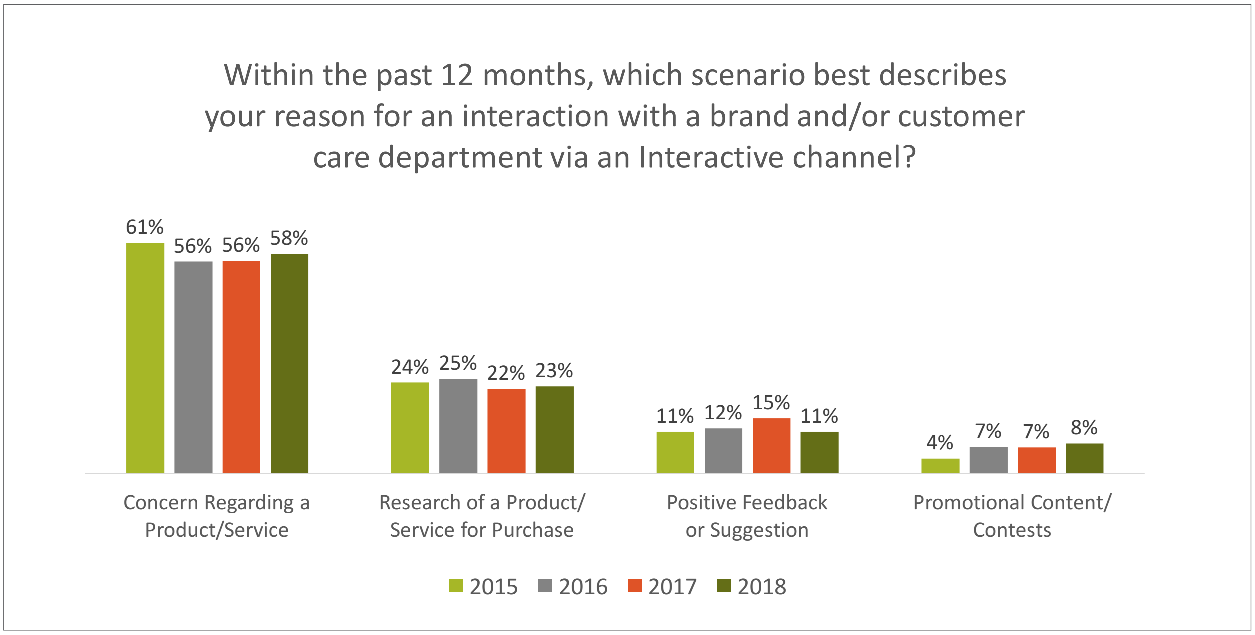


Like both Traditional and Mobile, Interactive Care is mostly utilized as a channel for resolving concerns related to products and services. For the sake of comparison, 68% of Traditional Care users, 33% of Social Media Care users and 58% of Mobile Care users indicated "Concern Regarding a Product/Service" as the typical reason for an interaction via each respective channel.



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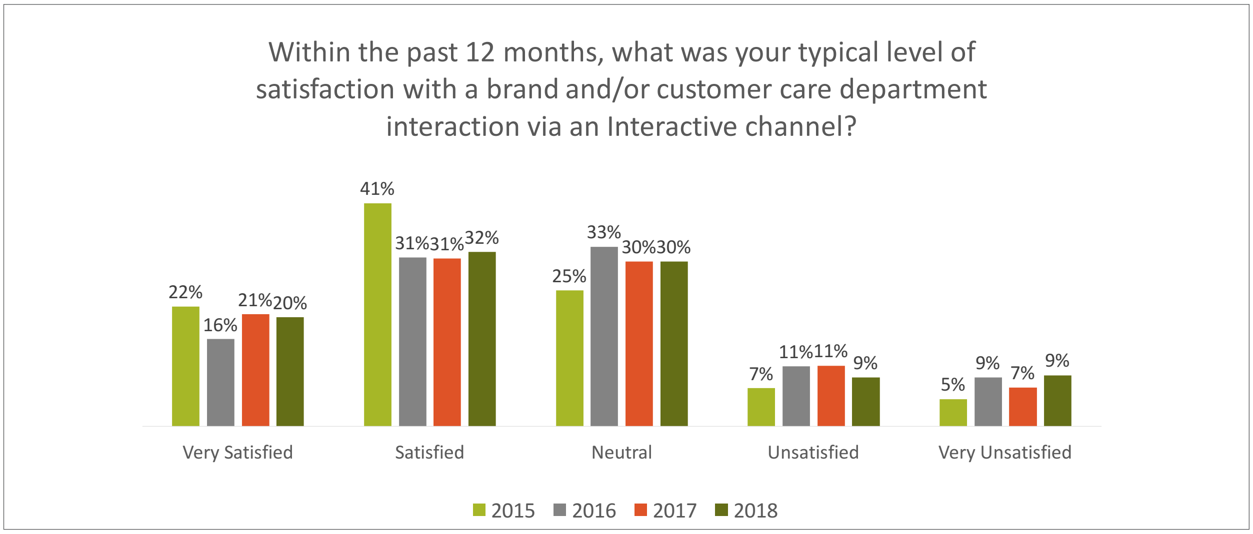
CHANNEL SATISFACTION AND CHARACTERISTIC OF MOST IMPORTANCE

Channel Results — Interaction Care

Satisfaction with the Interactive Care channel remained mostly unchanged year-over-year, with 52% of respondents indicating they were typically either “Very Satisfied” or “Satisfied” with their channel experience. Although the percentage of consumers who were unsatisfied with their experience remains low compared to previous years, a few common issues were signaled, most notably a lack of follow-up and pre-scripted responses in place of active listening. Below is a sampling of verbatim responses received from those who indicated dissatisfaction with their typical Interactive Care channel experience.



WHAT CAUSED YOU TO RATE YOUR LEVEL OF SATISFACTION AS YOU HAVE?

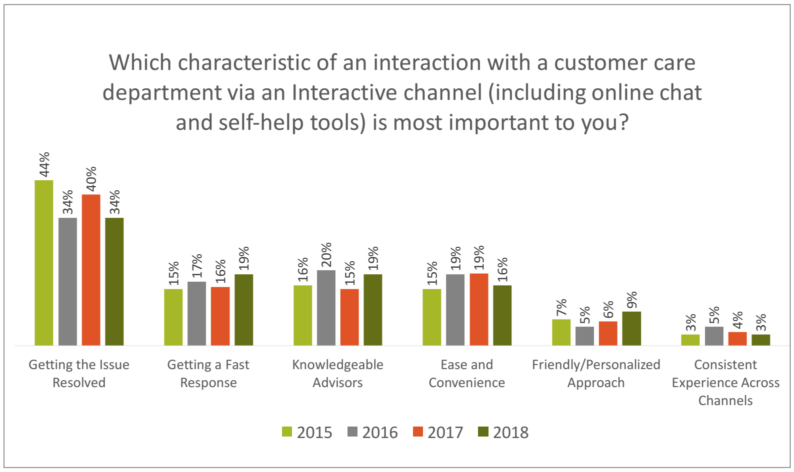
“Out of country employee unable to understand my English.”

“No one takes responsibility or follows up.”

“Kept switching the people I was chatting with.”

“Pre-written response didn’t address my problem.”

“I found the options to resolve my problem to be inadequate.”



“Getting the Issue Resolved” remains the core concern for Interactive Care users, but also of great importance is speed of response, informed agents and ease/convenience. By their very nature, Interactive Care solutions provide a certain level of speed and convenience. Where brands should strive to better meet consumers’ expectations is in the area of resolution rate and capabilities, where alternative channels (including Interactive Care) all too often fall behind when compared to Traditional Care options.

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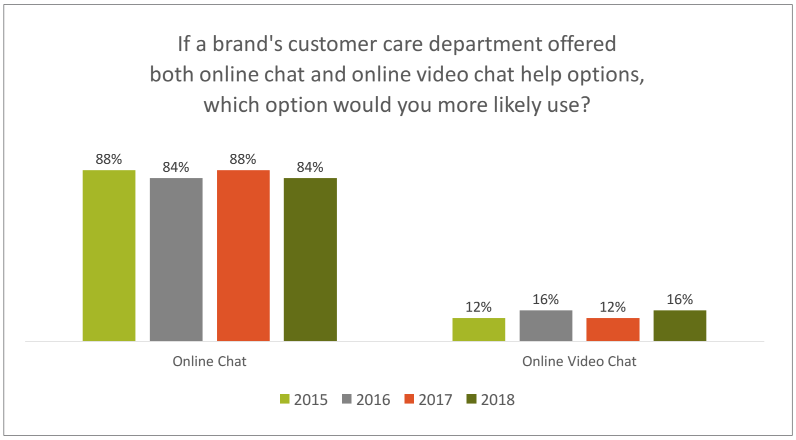
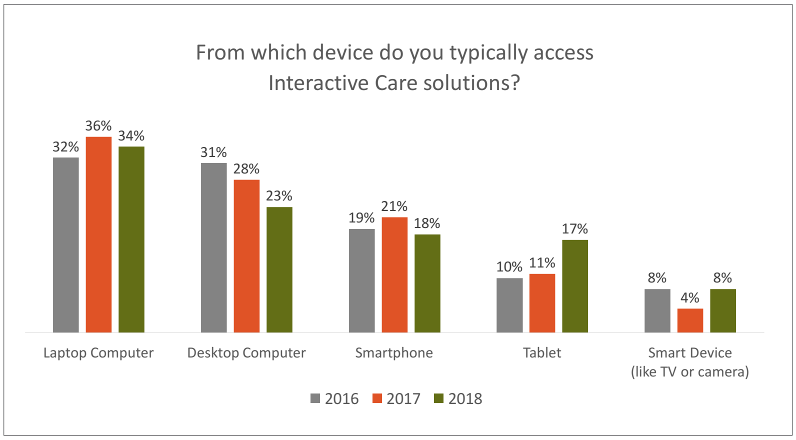
ONLINE VERSUS VIDEO CHAT, DEVICE USE AND DRIVERS OF ADOPTION

Channel Results — Interaction Care

Among Interactive Care users, Online Chat continues to maintain a healthy advantage over Video Chat. And although Online Chat was preferred over Video Chat among all age demographics, Video Chat did improve and survey respondents ages 25-34 were the most likely to embrace Video Chat, with 28% of this age group selecting Video Chat over Online Chat.

Computers (laptops, especially) continue to function as the most popular access point for Interactive Care solutions, with more than half (57%) of respondents naming computers as their typical access device. And while computers currently hold the prime device slot for Interactive Care solutions, the use of desktop computers as a typical access point has slipped two years in a row (from 31% in 2016 to 23% in 2018), while use of tablets has grown from 10% in 2016 to 17% in 2018. Brands should consider this development as they plan for solution functionality across various devices.





In a new question for 2018, we asked respondents what sort of change would make it more likely that they'd use the Interactive Care channel in the future. Although a wide variety of responses were received, including those below, the most frequent types of responses centered on improving response times/lowering wait times, providing access to a live agent, and enhancing certain technical aspects, like device accessibility.

What change would make you more likely to use the Interactive channel in the future?

"Quicker response times."

"Have a live person."

"Getting accurate responses to my questions."

"Not having to wait long."

"Ability to use on mobile browser."

"Native English speaking chat operators."

"Allow option to talk with a live person."

"Provide response solutions tailored to issue at hand."

"Reliable voice to text translations."

"Make chat more easily accessible and prominently featured."

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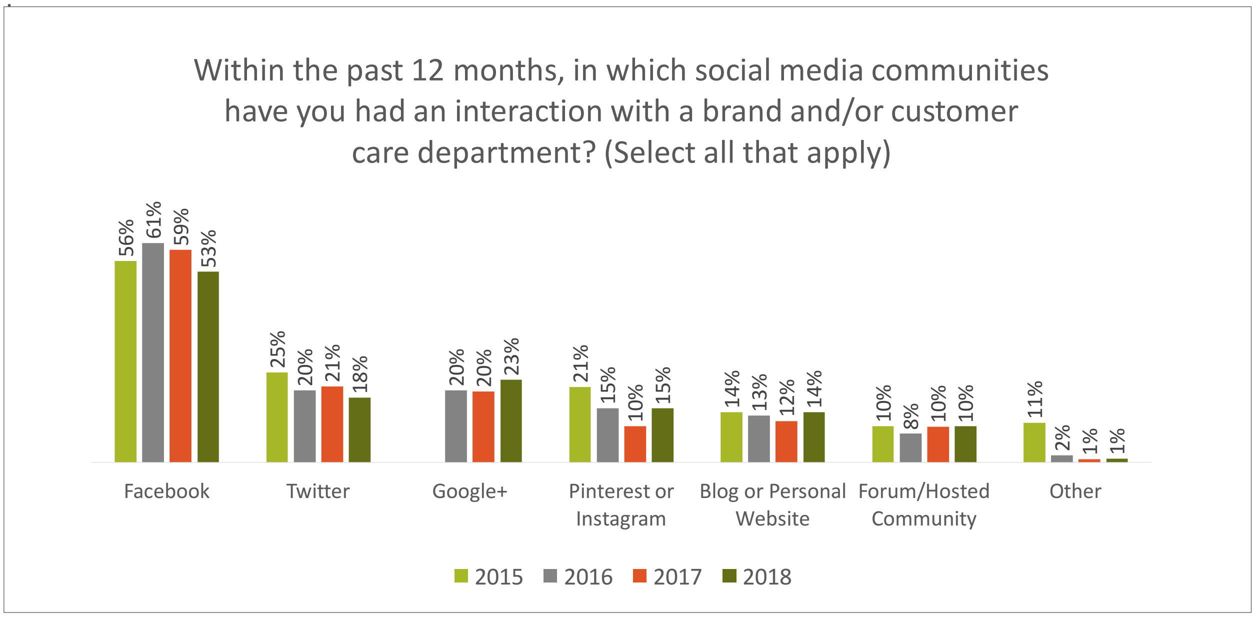
Social Media Care

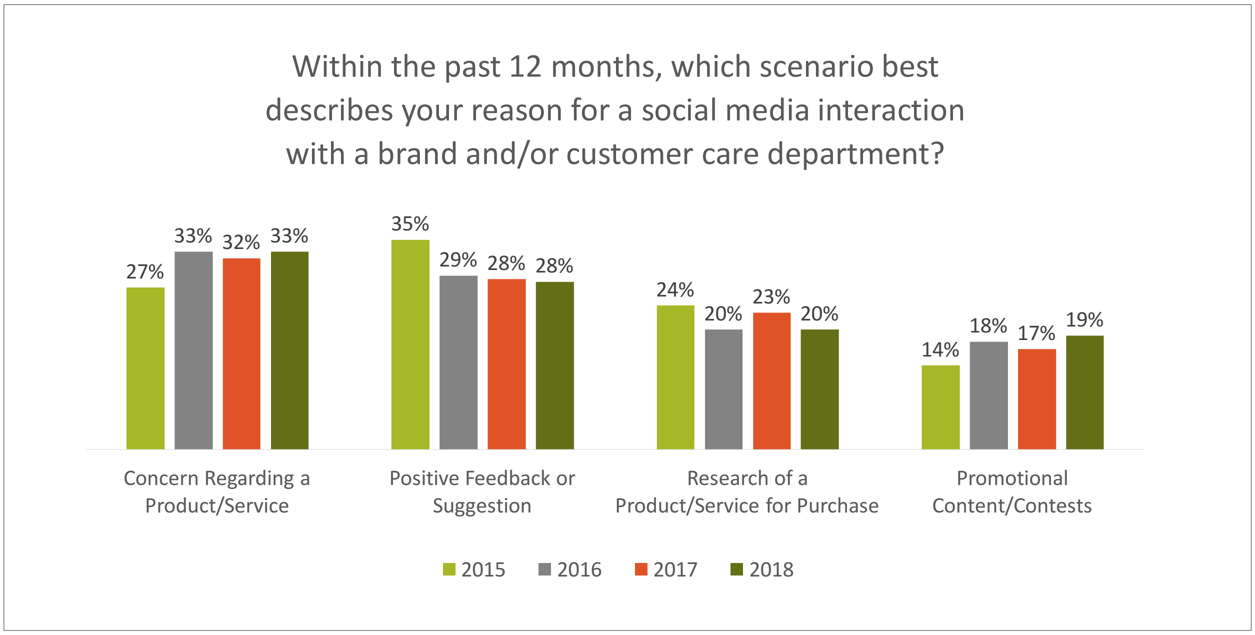
COMMUNITY USE AND REASON FOR INTERACTION

Channel Results — Social Media Care

As observed elsewhere in this report, 2018 hasn't been a banner year for Social Media Care. Overall use is down 22% (page 11), and privacy concerns are up (page 64). Almost all of the decline in use has taken place in two specific communities: Facebook and Twitter. So, while there are some positives, like a five-point jump in those using Pinterest/Instagram, the net effect remains negative only because Facebook and Twitter account for such a massive amount of the total channel volume.



Unlike other contact channels, which are centered around issue resolution, social media contacts are broadly distributed. One-third of Social Media Care users indicated "Concern Regarding a Product/Service" as their typical cause for contact. This compares with 68% of Traditional Care users and 58% of both Interactive and Mobile Care users. Therefore, it follows that the Social Media Care teams need not only be skilled at resolving issues but also be well-equipped to do things like gather, manage and disseminate customer suggestions.



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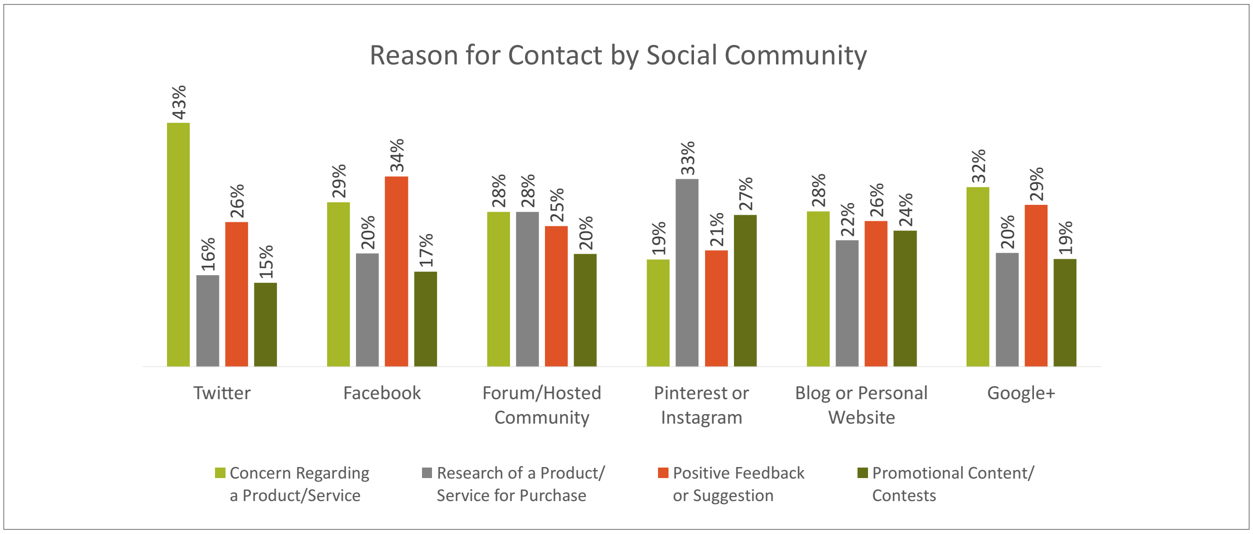
REASON FOR INTERACTION BY COMMUNITY AND CHANNEL SATISFACTION

Channel Results — Social Media Care

In examining how consumers use social media to interact with brands by community, different platforms have different strengths. Twitter is predominately used for resolving issues, whereas Facebook more often functions as an outlet for providing feedback and suggestions. When it comes to researching products/services for purchase, Pinterest and Instagram lead the way. For brands that want to engage online, they should seek to understand how these platforms differ and understand how their individual customers wish to interact by community.



WHAT CAUSED YOU TO RATE YOUR LEVEL OF SATISFACTION AS YOU HAVE?

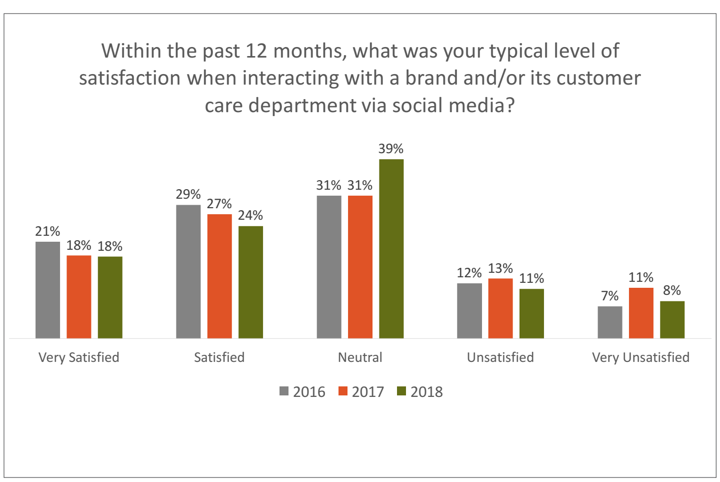
"No communication received back."

"They kept corresponding to bide time ... seemed like a runaround."

"They had wrong information."

"My problem just wasn't addressed."

"Not a personable experience — would have rather called."



Although Social Media Care use was down year-over-year (page 11), satisfaction rates were slightly improved in 2018, with fewer respondents indicating an "Unsatisfied" or "Very Unsatisfied" response. When the 19% of dissatisfied individuals were asked to describe the cause of their dissatisfaction, the primary reason was a lack of response. Also frequently cited was misinformation or responses that didn't lead to a specific resolution, resulting in the need for a follow-up contact on a different channel. Above is a sample of the responses received when participants were asked to describe what contributed to their level of satisfaction.

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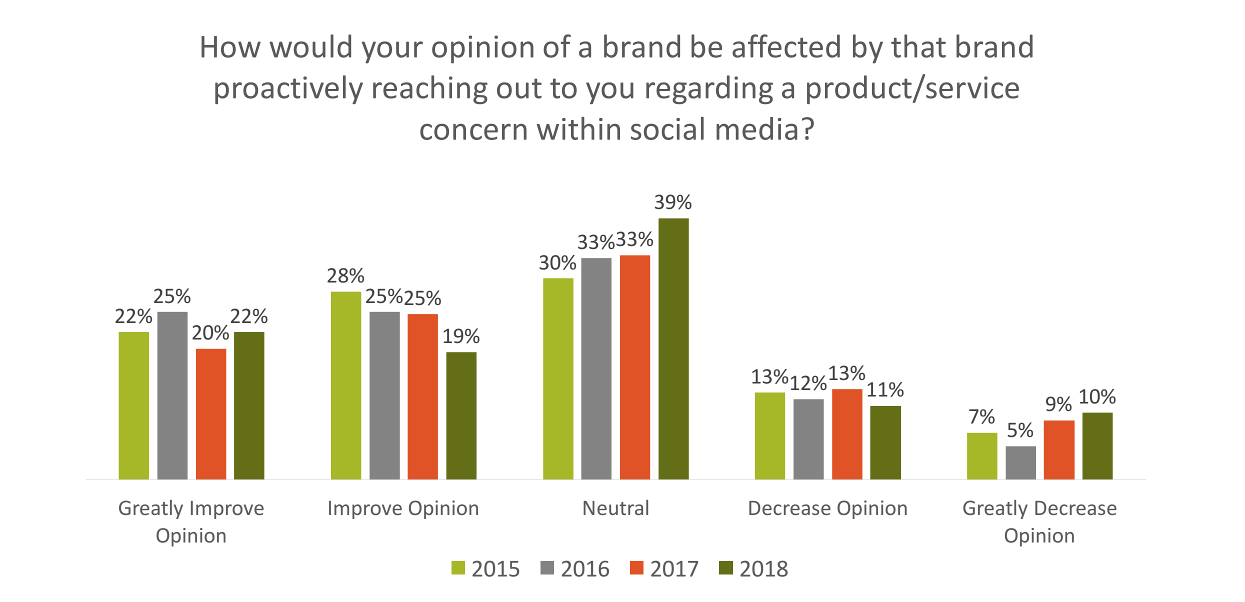
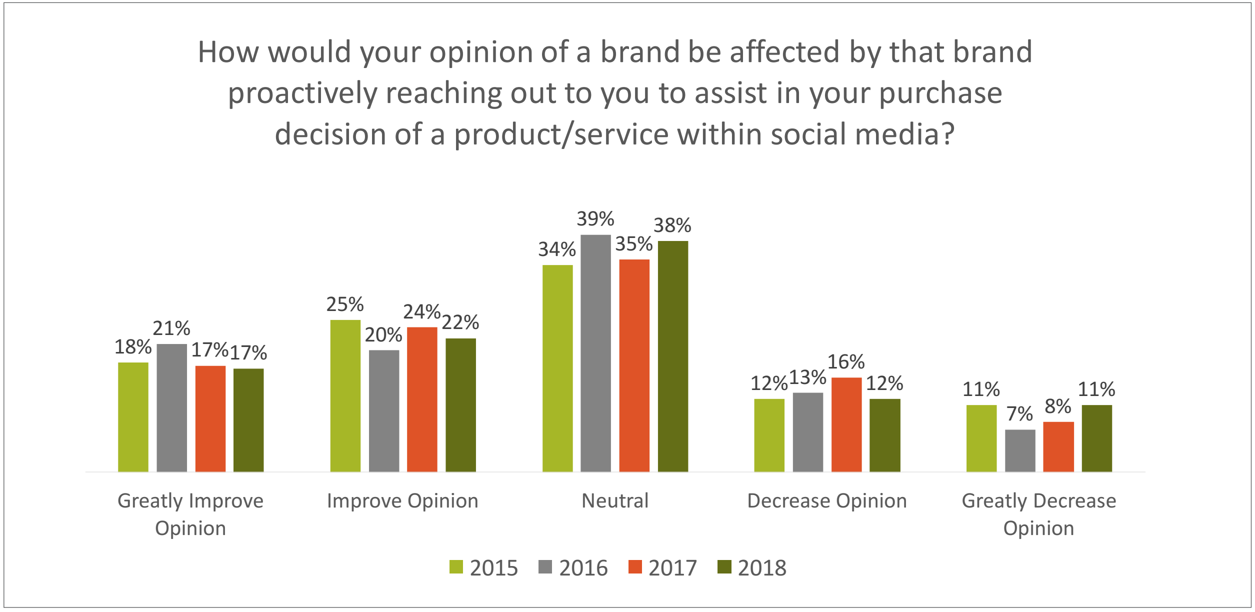
CONSUMER OPINIONS ON PROACTIVE OUTREACH

Channel Results — Social Media Care

Given the recent privacy issues that have plagued the social media industry, it comes as little surprise that consumer support of a proactive approach would be tepid, at best. In 2018, 41% of respondents had a favorable view of brands taking a proactive approach to resolving product/service concerns on social media, compared with an average of 48% from the previous three years' worth of data. Given recent events, brands need to tread lightly, striking a balance between providing value and coming off as intrusive.



Similar to the above results, 2018 respondents were less enthusiastic about brands taking a proactive sales approach on social media in comparison to results from previous years. This year, 39% of respondents would have an improved opinion of a brand if the brand proactively reached out to assist with a purchase decision on social media. This compares with an average of 42% from results dating from 2015–2017. Although brands should continue to reach out on social media, meeting the expectations of the majority of consumers, brands should also be mindful of privacy concerns and always know what is appropriate for their own specific customers.



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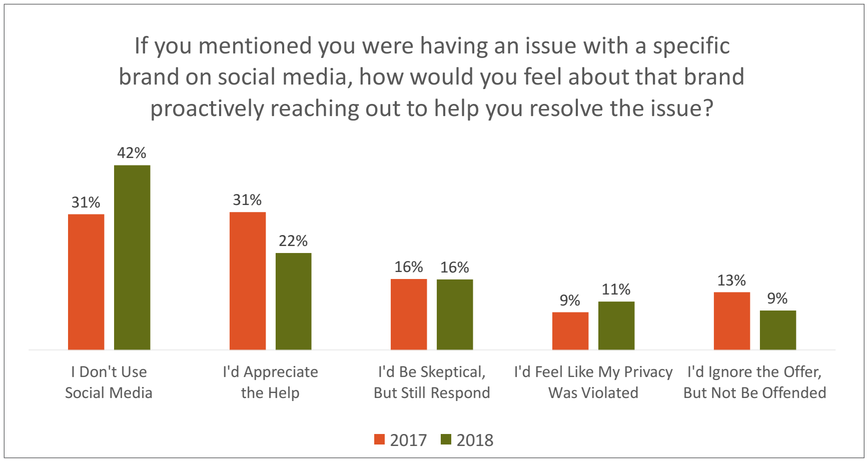
CONSUMER OPINIONS ON PROACTIVE OUTREACH, CONT.

Channel Results — Social Media Care

Echoing results from elsewhere in this report, social media use is down measurably year-over-year. Of those who are still using social media, fewer are open to the idea of a brand proactively reaching out with assistance. This is especially true if the assistance is an attempt to sell a product or a service. When it comes to issue resolution assistance, 22% of respondents said of proactive outreach that they'd "Appreciate the Help," a massive drop from 2017. Furthermore, this compares to only 12% when it comes to those asked about purchase assistance. Brands need to monitor the situation to understand if this is a developing trend or just a temporary setback. If it is part of a larger trend, brands will need to find new ways to promote the availability of their Social Media Care offering without posting unsolicited content like direct messages and thread replies.



Do you think it's appropriate for brands to proactively reach out to consumers on social media to assist with customer issues?

YES

2018- 53% • 2017- 55% • 2016- 53%

Do you think it's appropriate for brands to proactively reach out to consumers on social media to assist in purchases decisions?

YES

2018- 50% • 2017- 48% • 2016- 50%

In general, consumers continue to find it slightly more appropriate for brands to proactively reach out on social media in an attempt to resolve an issue as opposed to assisting with the purchase of a product. This notion is reinforced both in the results above and in those on the previous page. But with such parity between those who feel it acceptable for brands to take a proactive approach on social media (be it for issue resolution or sales) and those who don't, brands face a tough decision. Like most things in the CX space, the customer is usually the best guide. For this reason, brands should take every opportunity to explore the position of their own customers when it comes to proactively reaching out on social media.

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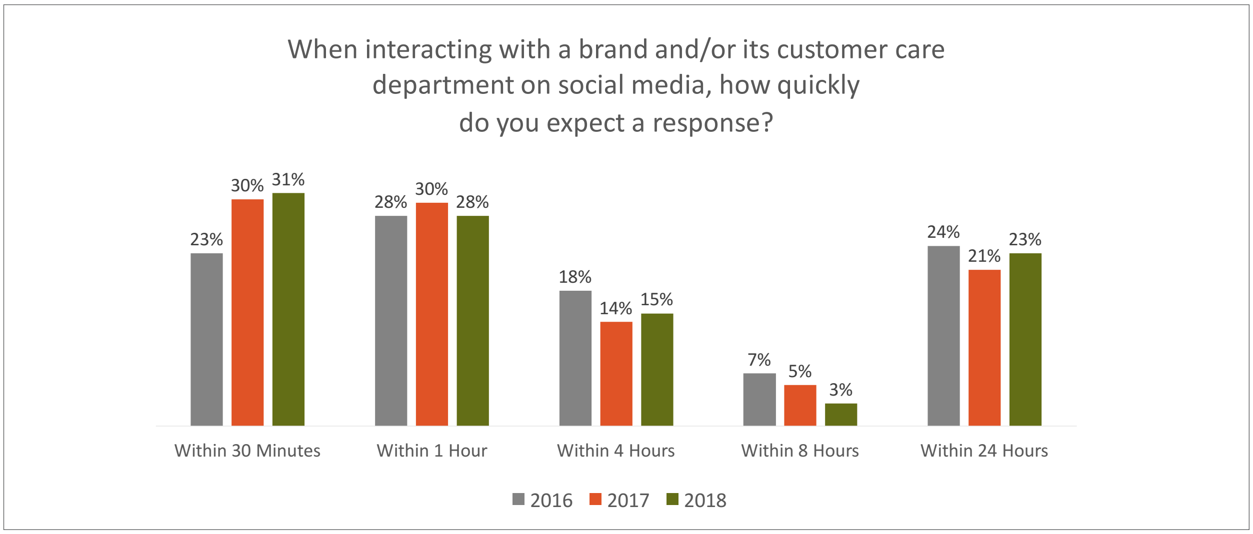
RESPONSE EXPECTATIONS AND CHANNEL EXPERIENCES

Channel Results — Social Media Care

Response expectations remained mostly consistent year-over-year, with 59% of all respondents expecting a response on social media in an hour or less. This compares with 60% in 2017. In both years, about half of these respondents expected the response to come within 30 minutes. Ease and speed are key considerations for every alternative channel, Social Media Care included. By placing resources to provide timely responses via social media, brands can help set the stage for an exceptional customer experience.



Have you ever used Facebook Messenger to resolve a customer care issue with a brand?

YES

2018- 5% 2017- 8%

I DON'T KNOW WHAT FACEBOOK MESSENGER IS

2018- 17% 2017- 16%

Within the past 12 months, have you used social media to research or resolve an issue without actually engaging the brand or its customer care department?

YES

2018- 48%

2017- 46%

2016- 52%

While the questions that appear in this Social Media Care section are asked of participants who have been screened as users of the channel, the one exception is the question at left, which was asked of the general public. Accordingly, results show that Facebook Messenger use for the purposes of resolving a customer care issue remains limited among most consumers. In 2018, only five percent of respondents indicated that they had used the service explicitly for the purposes of resolving an issue with a brand.

As with previous years, about half of respondents continued to indicate that they have (on at least one occasion in the previous 12 months) used social media to resolve an issue without directly engaging a brand. Most of these issues are resolved either through peer interactions or by reviewing a brand's responses to another customer. This demonstrates the effectiveness of social media's unique characteristic as a "one-to-many" platform. It's also a strong argument for brands to keep their social media engagements as public as possible, allowing observer customers to learn about solutions to problems they might also be experiencing.

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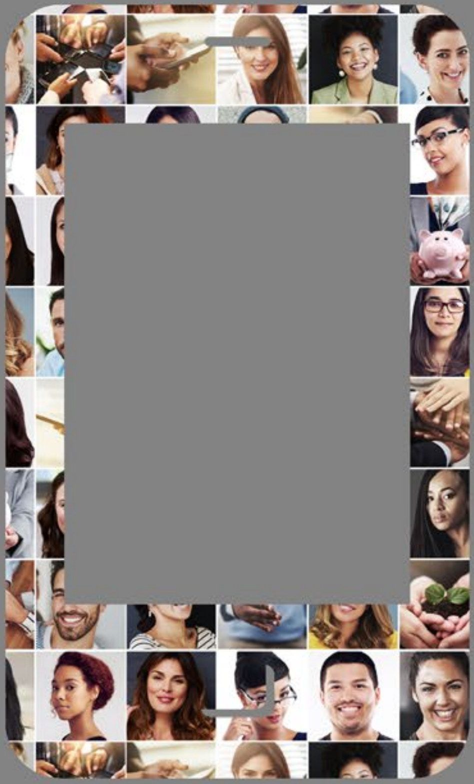
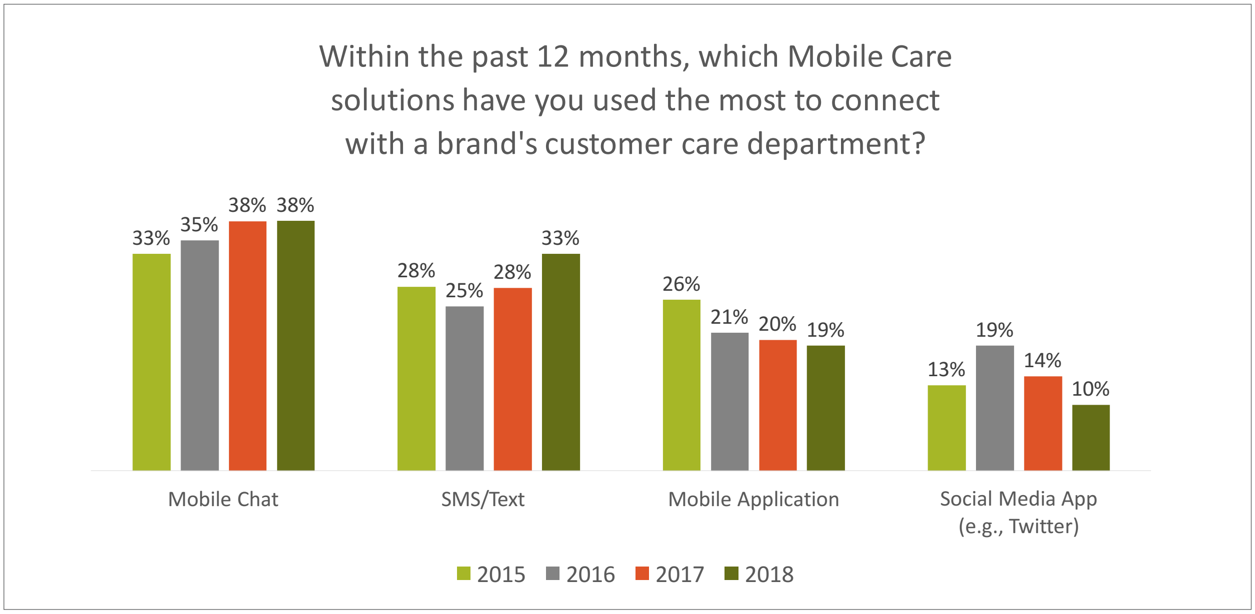


Mobile Care

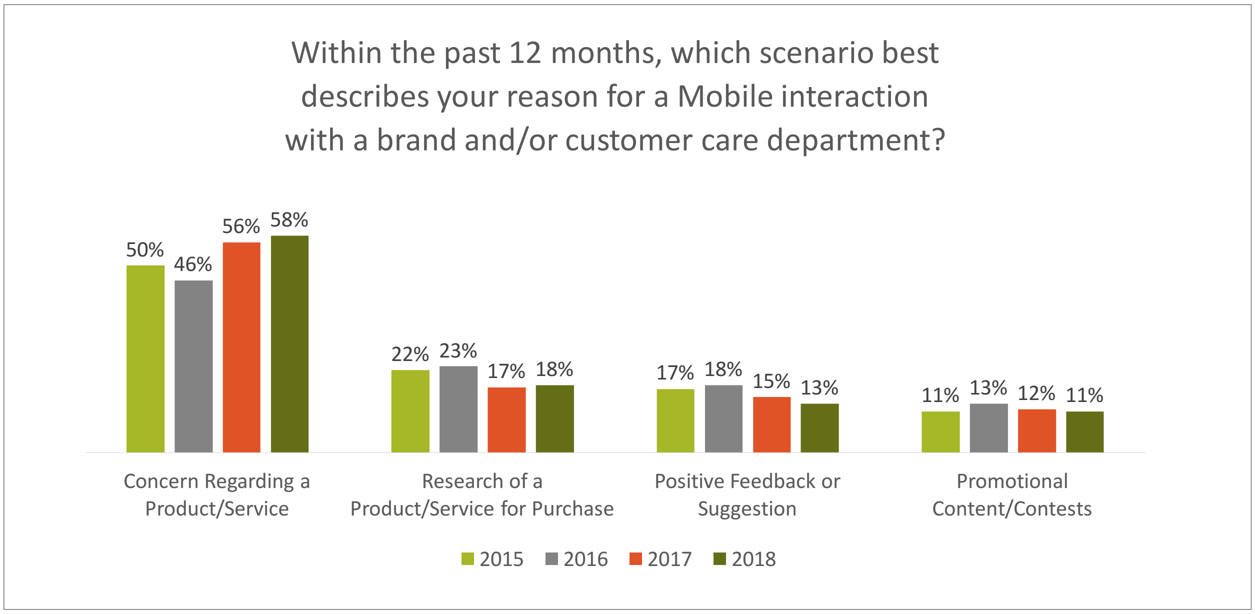
SOLUTIONS MOST USED AND REASON FOR INTERACTION

Channel Results — Mobile Care

Among Mobile Care solutions, 2018 results suggest two key trends — SMS/Text use is growing and social media app use is declining. As with all things social media-related in 2018, this most recent decline in social media app use could be part and parcel of the recent privacy revelations. Nonetheless, for brands looking to expand or further develop their Mobile Care capabilities and allocate funding, this development is worth serious consideration.



Like those of Traditional and Interactive Care, interactions with Mobile Care solutions are mostly for the purposes of addressing concerns over products/services. And while a significant portion of Mobile Care users (18% in 2018) also utilize Mobile Care solutions for the purposes of researching products/services for possible purchase, this is the lowest rate among alternative channels. Consumers use Social Media care for product research at a rate of 20%, while Interactive Care sits at 23%. With Mobile Care at 18%, there is an opportunity for marketing and care to partner together to create better solutions for researching products via a mobile device — especially when considering the widespread use of mobile devices as an eCommerce platform.



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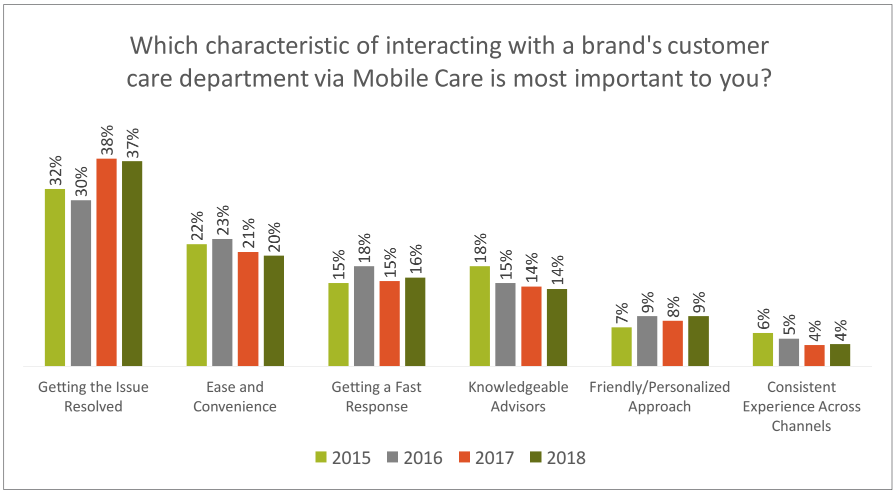
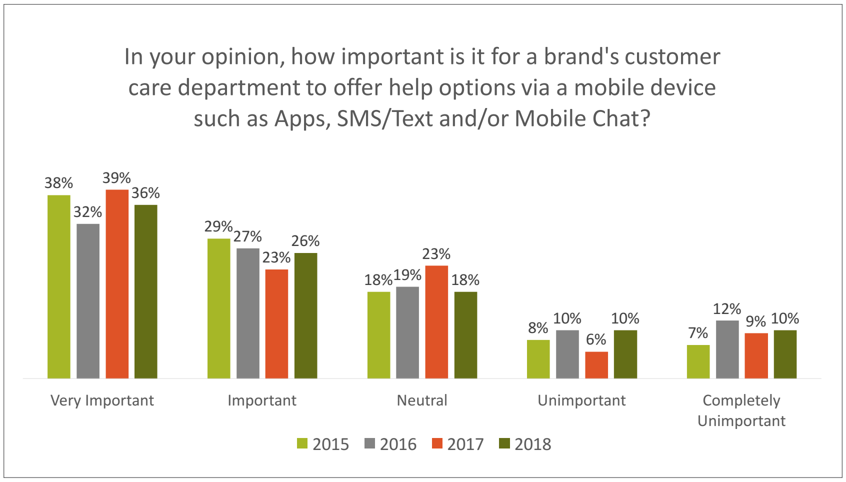
CHARACTERISTIC OF MOST IMPORTANCE AND OPINIONS ON MOBILE OPTIONS

Channel Results — Mobile Care

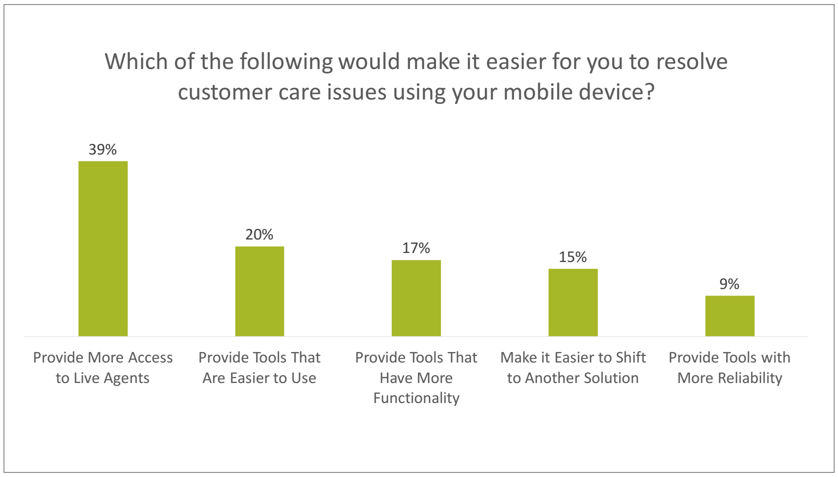
What matters most to Mobile Care users remained virtually unchanged year-over-year, and is quite similar to results from Interactive Care (page 58). "Getting the Issue Resolved" remains the most important characteristic for more than one-third of all users, while "Ease and Convenience," "Getting a Fast Response," and "Knowledgeable Advisors" also rank high.





Consumers remained mostly consistent in their opinion that Mobile Care solutions are an important brand offering. In 2018, 62% described them as "Important" or "Very Important," matching results from 2017. On the other hand, more consumers described mobile device solutions as "Unimportant" or "Completely Unimportant," with a total of 20% in 2018, compared to 15% in 2017.

In a new question for 2018, users of Mobile Care solutions expressed a strong interest in gaining greater access to live agents. Almost 40% of respondents named live agent access as the thing that would make mobile device resolution easier, trumping other responses such as tools that are easier to use (20%) and tools with greater functionality (17%).



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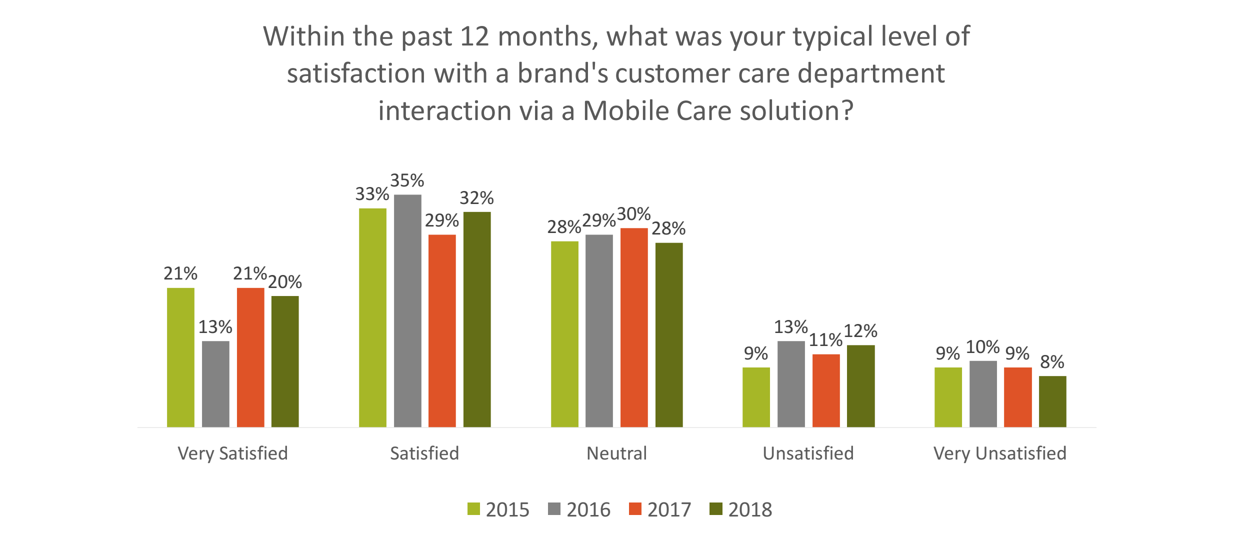
CHANNEL SATISFACTION

Channel Results — Mobile Care

Satisfaction with the Mobile Care channel saw positive (albeit minute) change year-over-year. Mobile Care ranked atop other channels of care with 52% of respondents indicating they were typically either “Very Satisfied” or “Satisfied” with the experience. This compares with 52% for Interactive Care, 47% for Traditional Care and 42% for Social Media Care. The below responses to an open-ended question aimed at satisfaction drivers provide some clues about how brands can improve the Mobile Care experience.



Lack of response and slow response were the primary causes of dissatisfaction among Mobile Care users that participated in this year’s survey. These were the most prevalent responses in an open-ended question designed to understand the underlying drivers. Also of concern were the number of respondents that indicated issues with the agent, such as they were unsympathetic or seemed to be hiding behind channel functionality in an attempt to delay or avoid resolving the issue.

What caused you to rate your level of satisfaction as you have?

“I received no response.”
“They didn’t care.”
“Slow response time.”
“Couldn’t get through; had to call by phone.”
“Company seemed to use mobile solution to delay solving the problem.”

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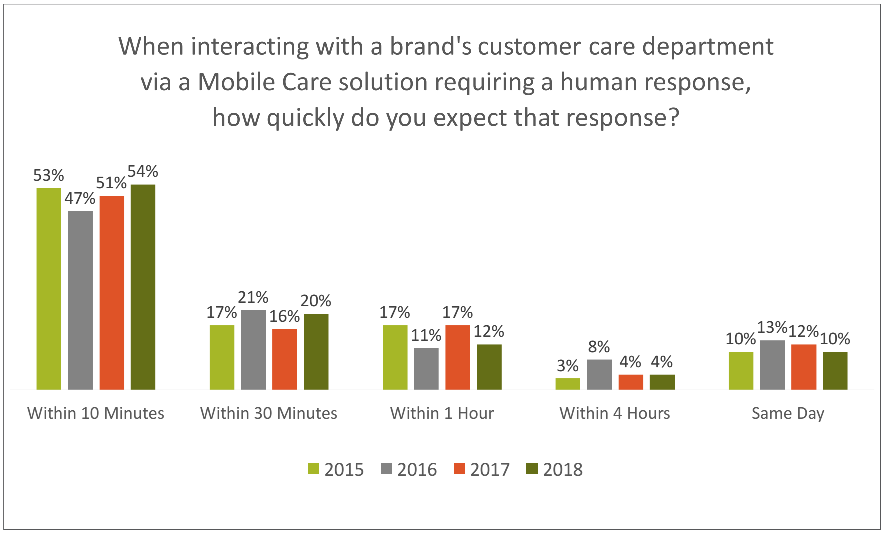
RESPONSE EXPECTATIONS, COMMUNICATION PREFERENCES AND PURCHASE HABITS

Channel Results — Mobile Care

Expectations for a quick response via a Mobile Care solution have heightened slightly in recent years, with expectations running the highest on record for 2018. In this year's results, nearly three-quarters of all respondents expected a response within 30 minutes, with more than half expecting a response within ten minutes. Speed to response translates into speed to resolution. Time and again, consumers indicate that a quick and easy resolution is what they want and expect, regardless of channel or solution.

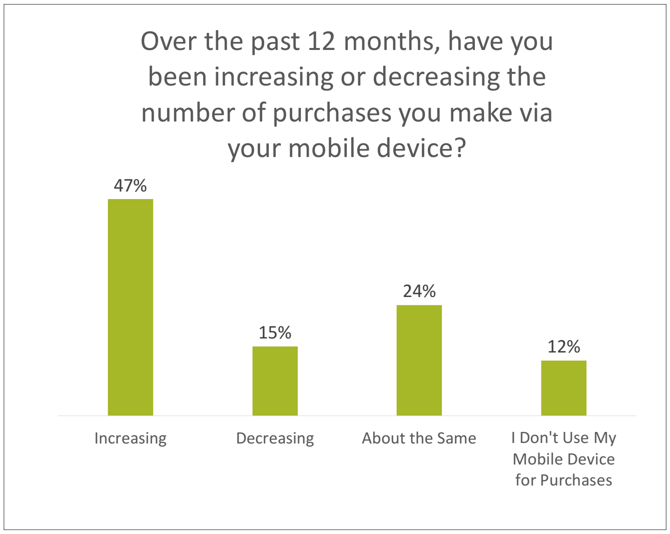


If a brand offered a Mobile Care app that was helpful to you, would you be open to receiving information about new products and services as part of that app?

2018 — Yes: 52%
2017 — Yes: 59%
2016 — Yes: 57%
2015 — Yes: 58%
2014 — Yes: 59%

In a question that's been asked since 2014 (left), this year's results reveal that only 52% of survey respondents would be open to receiving marketing messages through a brand's mobile app. This is the lowest response rate yet, down seven points from last year (-12%). And, while there was a sizable year-over-year decline, the fact remains that a slim majority of consumers are open to receiving marketing messages as part of the Mobile Care experience. This is worth bearing in mind as care and marketing groups collaborate to create new apps and other types of mobile-based solutions.

In a new question (right), almost half (47%) of Mobile Care users indicated that they have increased the use of their mobile device as a shopping platform. This is especially profound considering only 15% said they've decreased mobile device purchases, while 12% said they don't use their mobile device for purchases. Based on these results, brands can continue to expect big things from mobile-based commerce. To get the most out of this revenue stream, companies also have to ensure that mobile-based care solutions are available, easy-to-use and effective at resolving a wide range of customer issues.



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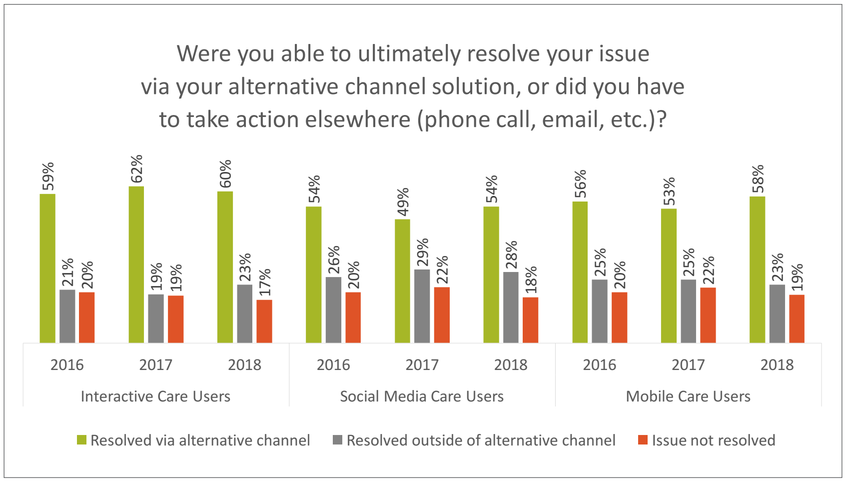
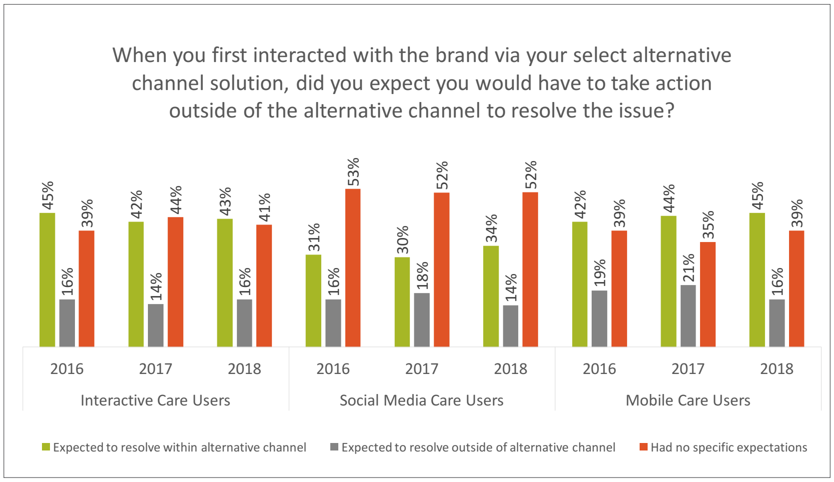
Alternative Channel Journey

RESOLUTION VIA CHANNEL AND EXPECTATIONS

Channel Results — Alternative Channel Journey

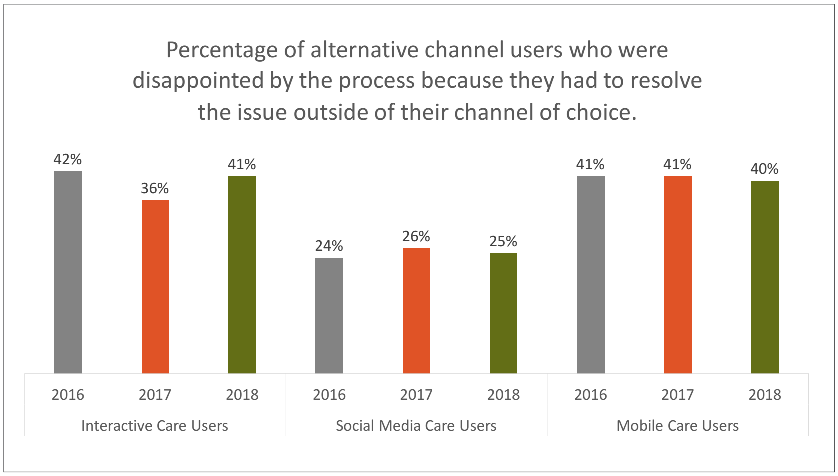
Alternative channel resolution rates remained constant year-over-year, leaving lots of room for improvement. The biggest change coming in the form of a five-point bump for Mobile Care, an increase of nine percent. Although the resolution rate provided by alternative channels has remained constant over the last several years, averaging 57% in 2018, this rate is far below both Traditional Care and multichannel. In 2018, multichannel provided survey respondents with a resolution rate of 75%.





When it comes to getting a resolution in an alternative channel, Social Media Care users continue to have lower expectations compared to users of Interactive and Mobile Care. Over three years of data, an average of 32% of Social Media Care users expect to have their issues resolved in channel, compared to an average of 43% of Interactive Care users and an average of 44% of Mobile Care users. Although actual resolution rates are slightly lower for Social Media (above), there is still a significant perception issue for the channel.

Social Media Care users continue to experience less disappointment when they are unable to resolve an issue in channel. It's likely the case that disappointment remains low because people continue to expect little from a channel that offers the lowest FCR (page 14), the lowest resolution rate (page 20) and the lowest satisfaction rate (page 33) among all alternative channels. If brands want consumers to expand their use of social media as a customer care channel, they'll need to tackle issues of channel capability first, then elevated use (and satisfaction) will follow.



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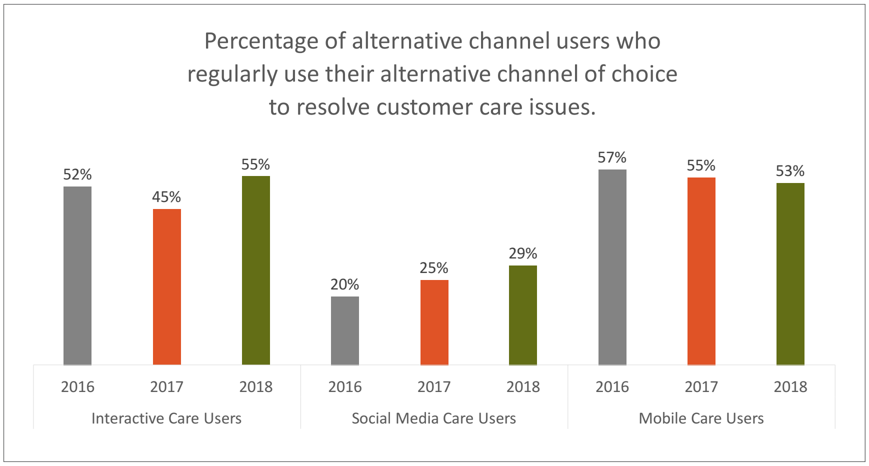
ALTERNATIVE CHANNEL USE FOR ISSUE RESOLUTION

Channel Results — Alternative Channel Journey

Among alternative channels, Interactive and Mobile Care remain the most popular among consumers for the purpose of resolving customer care issues, with Interactive Care growing in regular use by ten points year-over-year, up 22%. Social Media Care has also gained more regular users in two consecutive years but still falls far short of the usage rates of both Interactive and Mobile Care.



When it comes to alternative channel customer care, Amazon.com continues to succeed across all channels in the minds of consumers, just as it had in results from the previous two years. Dell, Facebook, Wendy's and Delta are also all newcomers to the list. Of these, Wendy's has been grabbing lots of attention as of late with its brand of quirky, irreverent posts that take aim at naysayers and the competition alike, with its Twitter channel functioning as much as a marketing vehicle as a channel of care.

The brands below are listed in descending order based on their frequency in the responses received when survey respondents were asked to name which brands provide the most useful support for resolving customer issues using an alternative channel.

Which brand(s) provides the most useful support for resolving customer issues in your alternative channel of choice?

Interactive Care Users	Social Media Care Users	Mobile Care Users
Amazon	Amazon	Amazon
Google	Facebook	Apple
Dell	Wendy's	Google
Apple	Delta	Verizon

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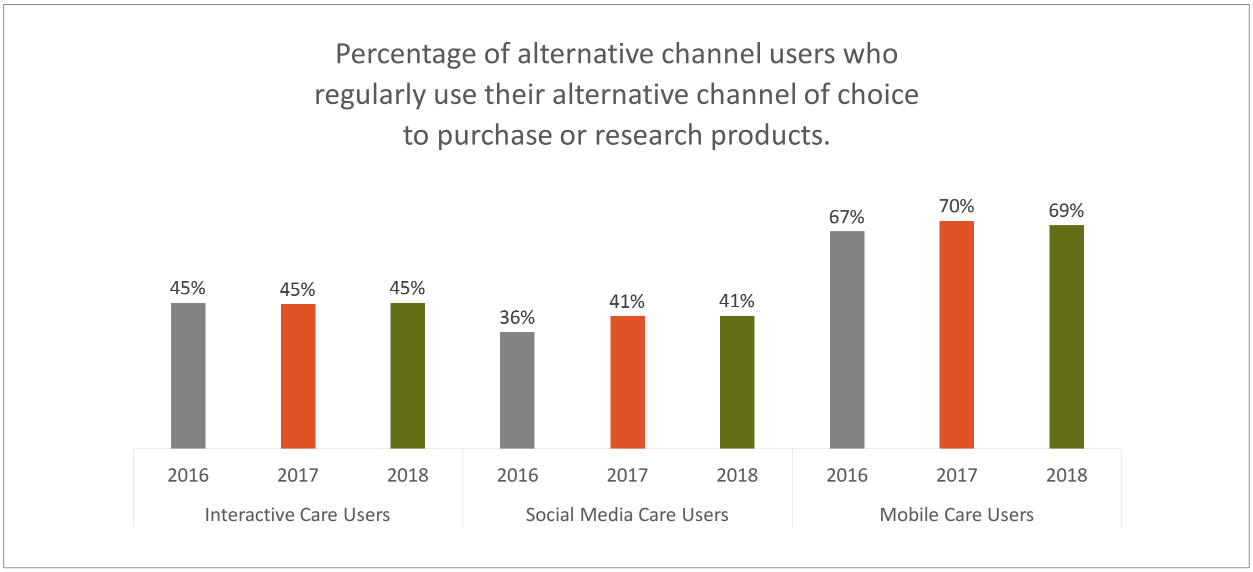
ALTERNATIVE CHANNEL USE FOR PURCHASE OR RESEARCH

Channel Results — Alternative Channel Journey

Slightly more than two-thirds of mobile users regularly use the platform for the purposes of researching and purchasing products. This result is significantly higher than those of either Interactive or Social Media users who, when combined, average just 43%. Most interesting is the fact that Interactive hasn't budged as a purchase/research channel in the past three years, even as more and more brands release chatbots and other AI-powered solutions to assist with a variety of interaction types.



As with customer care across alternative channels (previous page), Amazon continues to be named the top brand for providing useful product research and purchase support across all alternative channels. Amazon has been synonymous with mobile shopping for some time. But never a brand to rest on its laurels, Amazon has continued to stay out front with acquisitions of other brands, an expanded Prime Day event, and new services like Amazon Key, in which deliveries can be placed right inside homes and automobiles.

The brands below are listed in descending order based on their frequency in the responses received when survey respondents were asked to name which brands provide the most useful support for researching and purchasing products using an alternative channel.

Which brand(s) provides the most useful support for purchasing or researching products in your alternative channel of choice?

Interactive Care Users	Social Media Care Users	Mobile Care Users
Amazon	Amazon	Amazon
Google	Google	Apple
Apple	Facebook	Google
Verizon	Nike	Verizon

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CHANNEL RESULTS CONCLUSIONS

Key Findings:

- If a brand completely eliminated email support, only 17% of consumers would have an improved opinion of the brand, versus 46% of consumers who would have a declining opinion of the brand. (page 55)

- Year-over-year, use of Facebook to connect with brands was down ten percent, while Twitter was down 14%. (page 61)

- SMS/Text use has grown for two consecutive years, with 2018 results showing 33% of Mobile Care users utilizing SMS/Text within the past 12 months. (page 67)

- For the second year in a row, consumers named Amazon.com as the top provider of the most useful care and sales support solutions across all alternative platforms. (pages 73 and 74)

Regardless of fading corporate support for Email, consumers continue to show strong enthusiasm for the solution. Over the last few years, roughly one-third of all Traditional Care users named Email as the specific Traditional Care solution they use most often. Furthermore, the implications of ending email support remains decidedly negative when it comes to brand opinion. While many brands will undoubtedly continue to wind down support for Email, brands should seek to understand the implications this will have on their specific customers. It should also force them to take a closer look at the effectiveness and level of satisfaction with the alternative options they provide.

As noted in a variety of areas throughout this report, Social Media Care has been significantly impacted by the recent revelations regarding information privacy. Use is down, as is the consumer's perception of social media as a channel of support. Although brands are not to blame for this recent fallout, they can play a role in reestablishing trust, particularly if brands want their consumers to embrace social media as a channel of support.

Based on the company's dedication to and investment in innovation, it comes as no surprise that Amazon.com continues to outshine other brands when it comes to alternative channel support. Amazon.com continues to take a first and best approach when it comes to alternative channel solutions and innovations, and this has a radical impact on how consumers view the solutions and service provided by other brands. Every brand, regardless of industry, would do well to keep on eye on Amazon.com (as well as other innovation leaders) to truly understand the changing expectations of their own customers.

Critical Questions Brands Should Be Asking Themselves

If we have plans to eliminate or reduce our reliance on email support, do we understand how this will influence our customers' opinion of our brand, and are we providing effective alternatives?

Have we addressed the privacy and security concerns of our customers when it comes to utilizing social media as a channel of support?

Are we doing a good job of monitoring the initiatives and innovations of the brands that are redefining the expectations of our customers, especially in regards to alternative channel functionality and capability?

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METHODOLOGY

Google Consumer Surveys reports on the inferred age and gender of anonymous respondents based on the websites users visit, as well as their location based on IP addresses. Income and urban density are then approximated using census data for particular geographic regions. Inferences, as they relate to these categories, may not be available for all survey participants.

Please note that it's possible that Google Consumer Surveys may mis-categorize people. For example, if someone visits websites that are usually frequented by younger people, they may be categorized as younger than their actual age. Similarly, if a household uses a shared computer, we may categorize that "user" based on the combined interests of the household.

Provided the complexities of participant screening questions through the study's body of surveys, we present unweighted findings. When targeting an audience representing the U.S. Internet population, Google Consumer Surveys attempts to find respondents that match the distribution of people in the U.S. by age, gender and location as reported in the U.S. Census Current Population Survey (CPS). When outliers were observed in the data as they relate to the inferred age, income, gender and urban density, we made an effort to highlight these findings.

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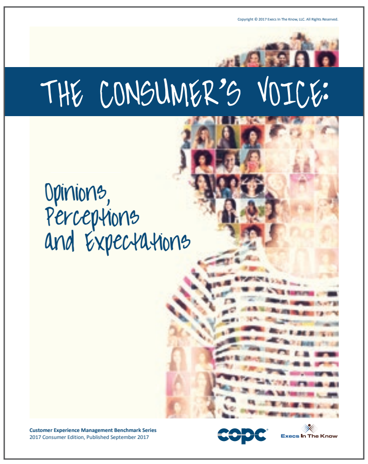

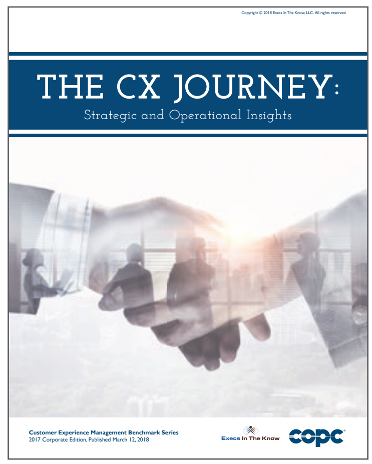

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