



# 2019 NICE inContact Customer Experience (CX) Transformation Benchmark

Regional Findings:  
Business vs. Consumer —  
Australia, United Kingdom, United States

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## Firmographics

# Executive Summary

# Overview

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

This report presents region-specific findings from the business wave of the research and accompanies a [global report](#). It provides comparative results to the consumer study published in 2018. Year-over-year findings for the US are available and presented where applicable.

## This report includes:

- The channels that businesses offer along with their own assessment of the quality of the service they provide, across both agent-assisted and self-service channels
- Comparisons of what businesses report to what consumers say about their actual experiences across channels, as well as attitudes

NICE inContact conducts this study annually and tracks changes over time.

The full global report can be found [here](#).

# Major Findings

Today's highly competitive experience economy calls for companies to elevate their game. Organisations of all sizes now must consistently deliver exceptional customer experiences to achieve business goals and drive growth. This research aims to help customer experience leaders better understand and improve the customer service experience, while expanding their service channel offerings and advancing their contact centre operations.

The research found significant differences in how customers and businesses perceive the customer service experience.

## Channel Performance Gaps

- Businesses underestimate customer satisfaction with agent-assisted methods overall, and particularly underestimate phone.
- For self-service methods, businesses overestimate customer satisfaction with automated assistants / chatbots and IVR.
- Businesses give every method of communication a higher Net Promoter Score® than do consumers. The largest gaps are for IVR, automated assistant / chatbot, email, text, and social media.

## Chat Momentum

- Businesses are increasingly offering online chat and consumer usage is increasing significantly.
- Consumer and business ratings for chat are all relatively high, including for satisfaction, ease of use, likelihood to recommend, first contact resolution, and Net Promoter Score®.

## Customer Experience (CX) Success

- Businesses overestimate their own CX success compared to consumer perceptions for:
  - Making it easy for customers to get issues resolved in their preferred channels
  - Providing a consistent customer service experience across the purchase journey

## Seamless Omnichannel Interactions

- Providing seamless omnichannel interactions continues to be important to consumers, but businesses give themselves poor ratings in this area.

## AI Disconnect

- Businesses misjudge consumers' desire to use AI for customer service, as well as AI's ability to make it easy for customers to get issues resolved.

The research found **significant differences** in how customers and businesses perceive the customer experience.

# Methodology

This report presents region-specific findings from the business wave of the research and accompanies a [global report](#). It provides comparative results to the consumer study published in 2018.



## Fielding

- The consumer wave of research was fielded March-April 2018
- The business wave of research was fielded November-December 2018



## Consumer screening criteria

- Consumers who communicated with a company through a customer service experience in the last three months
- US, UK, and Australia
- N=2,407
  - N=802 US
  - N=802 UK
  - N=803 Australia



## Business screening criteria

- Contact centre decision-makers across industries
- US, UK, and Australia
- N=905
  - N=301 US
  - N=304 UK
  - N=300 Australia



2019 CX Transformation Benchmark

# Australia Businesses 2019 Research

Including comparison with  
2018 CX Transformation Benchmark, Consumer Wave

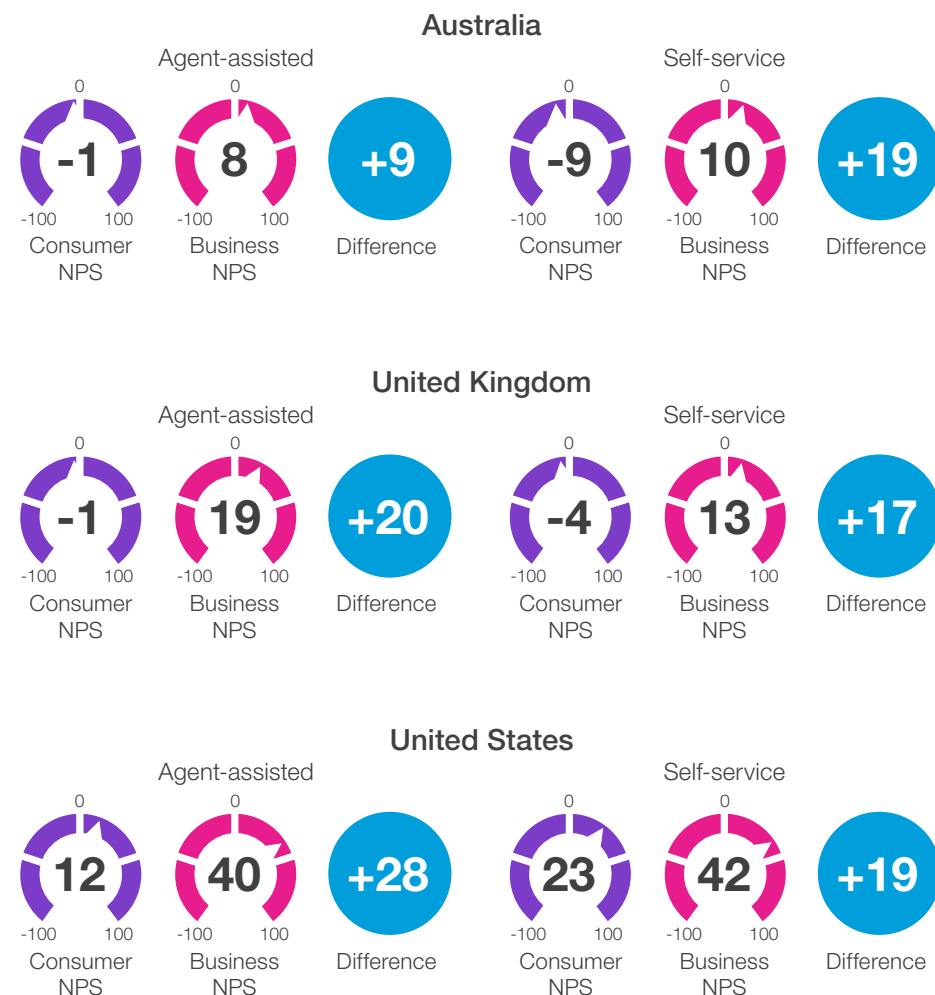


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# Australia Major Findings

- The vast majority of Australia organisations provide their customers phone, email and websites as methods of communication.
- Interestingly, compared to other regions Australia businesses feel more negative about most methods of communication — awarding themselves consistently reporting lower rates of satisfaction, NPS®, and ease of use.
- Of all channels, businesses in Australia report the highest satisfaction with mobile app. They underestimate customer satisfaction with online chat, phone, text and website.
- Both businesses and consumers in Australia prefer talking to a live representative over other forms of communication.
- Australia businesses believe they are doing better than consumers do in two key areas — delivering consistency across the customer experience journey and making it easy to get issues resolved in preferred channels.
- Businesses in Australia are optimistic about AI, but believe customers want Artificial Intelligence in CX more so than customer actually want the technology.
- Businesses in Australia give every method of communication except video chat a higher Net Promotor Score® than consumers.
  - NPS varied by country with significant differences



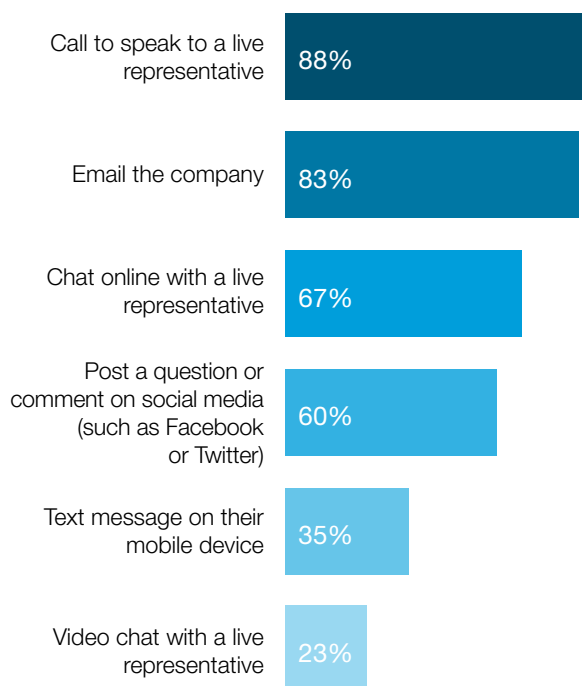


# Most Australia organisations provide phone, email and websites

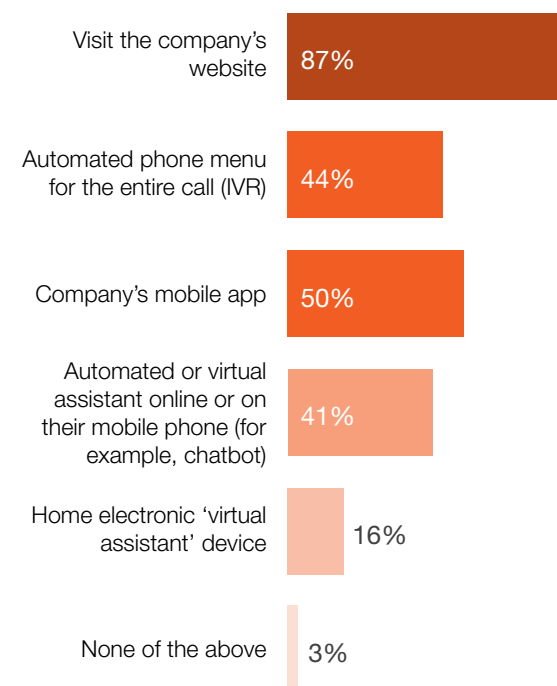
Being able to call and speak to a live representative is the most popular method of agent-assisted communication offered by Australia businesses, followed closely by email.

Most Australia organisations offer a company website for customers to interact with the organisation.

## Agent-assisted Methods of Communicating with Customers



## Self-service Methods of Communicating with Customers



Agent-assisted  
Self-service

CC1A. In which 'Agent-assisted' ways does your company communicate or interact with customers? Please select all that apply.

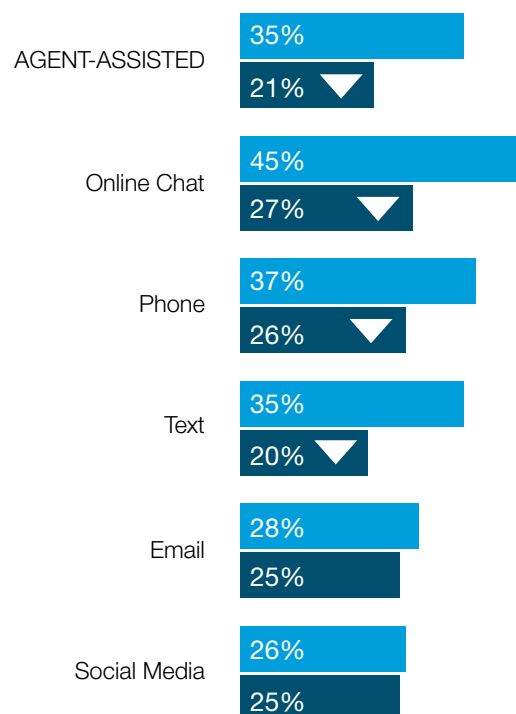
CC1B. In which 'Self-service' ways does your company communicate or interact with customers? Please select all that apply. \*Wording changed for responses between 2017 and 2018.

White arrows indicate statistically significant difference at the 95% confidence level.

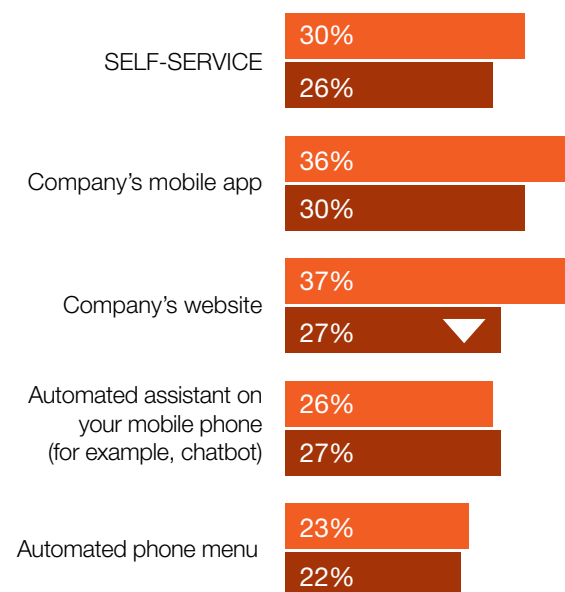
# Businesses in Australia underestimate satisfaction on various methods of communication

Compared to consumers, Australia businesses are significantly less likely to say customers are satisfied with agent-assisted methods overall as well as online chat, phone, text and website.

## Satisfaction with Agent-assisted Methods of Communication: Highly Satisfied (9/10)



## Satisfaction with Self-service Methods of Communication: Highly Satisfied (9/10)



Significantly Higher   
 Consumer   
 Consumer  
 Significantly Lower   
 Business   
 Business

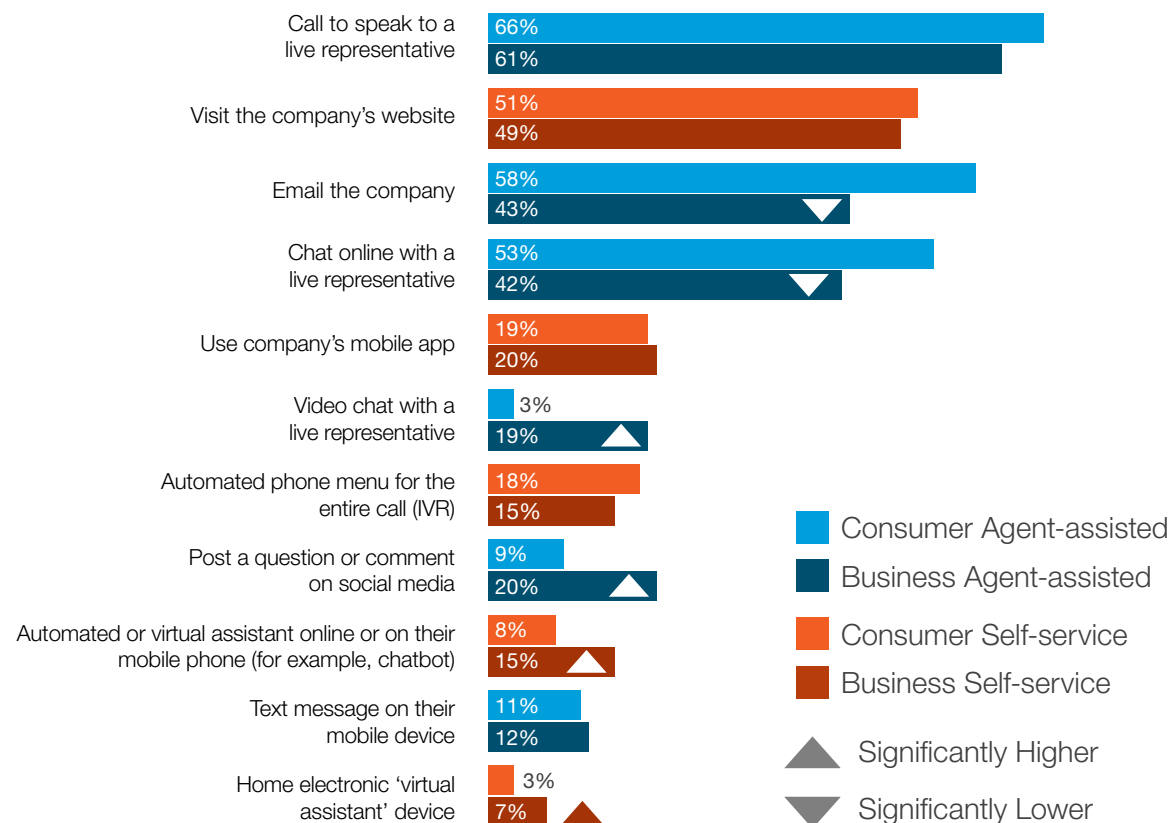
CH1. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, overall how satisfied are customers with this method of communication during their experience? CH2. For each method below that your customers can interact with the company in a 'Self-service' fashion, overall how satisfied are customers with this method of communication during their experience?  
 White arrows indicate statistically significant difference at the 95% confidence level.

# Consumers in Australia prefer email and online chat more than businesses perceive they do

Consumers in Australia are significantly more likely to give email and online chat a top 3 ranking than businesses.

Conversely, businesses are significantly more likely to prefer interacting with their customers via video chat, social media, virtual assistant / chatbot and/or home electronic virtual assistants.

## Preferred Way to Interact with Customers: Top 3 Ranking



CP1. Please rank the top three ways that your company would prefer to interact with a customer during a service experience from the list below. White/orange arrows indicate statistically significant difference at the 95% confidence level.

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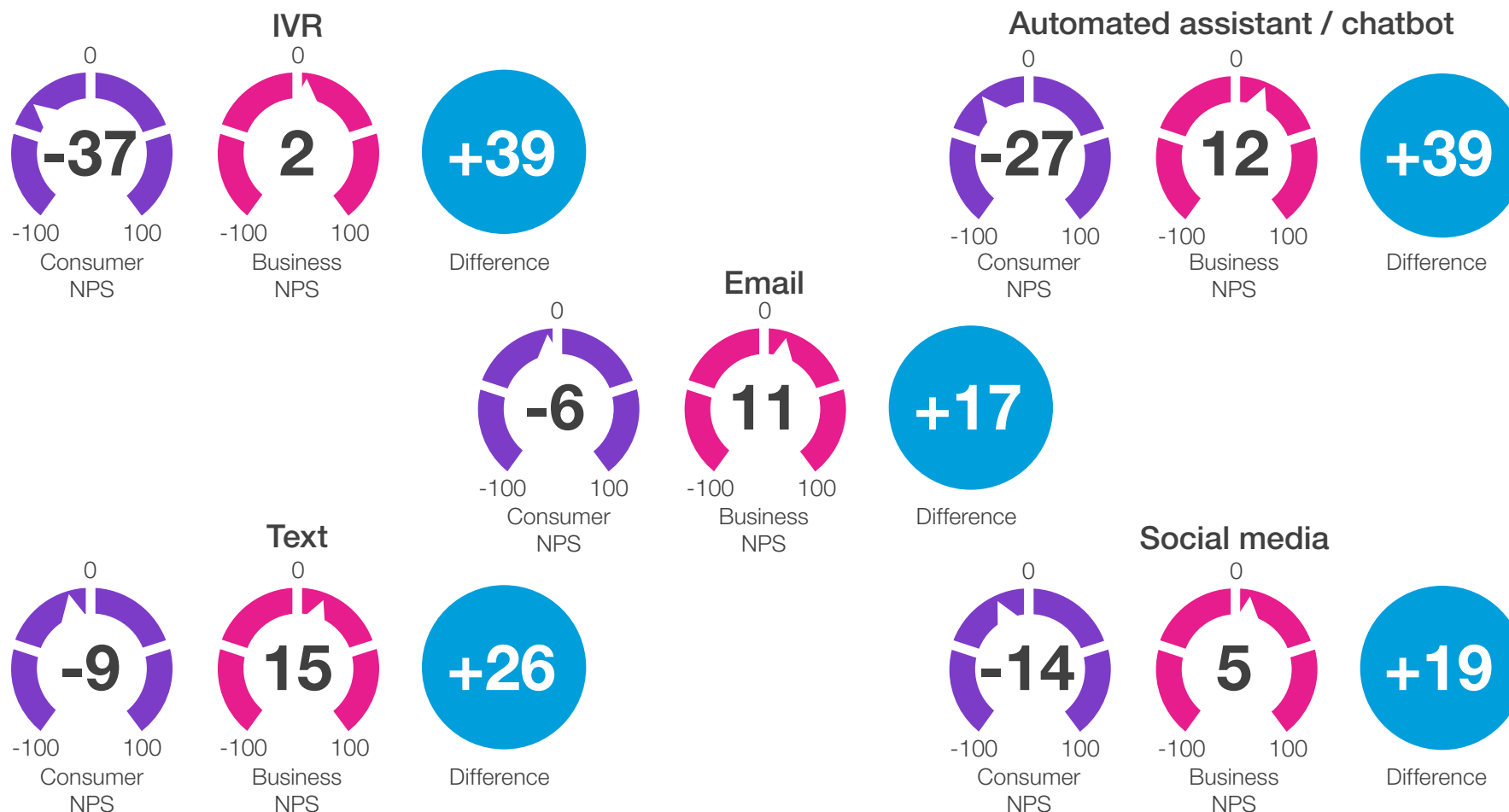
With the exception of online chat, Australia businesses give every method a higher Net Promoter Score® when asked to rate how likely consumers would be to recommend their company

Method	Consumer NPS	Business NPS	Difference
<b>Agent-assisted</b>	<b>-1</b>	<b>8</b>	<b>+9</b>
Video chat	n/a	13	n/a
Online chat	22	12	-10
Text	-9	15	+26
Phone	6	11	+17
Email	-9	1	+10
Social media	-14	5	+19
<b>Self-service</b>	<b>-9</b>	<b>10</b>	<b>+19</b>
Mobile app	12	19	+7
Automated assistant / chatbot	-27	12	+39
Website	6	8	+2
IVR	-37	2	+39
Home electronic assistant	n/a	22	n/a

CH5. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel? CH6. For each method below that your customers can interact with the company in a 'Self-service' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel?

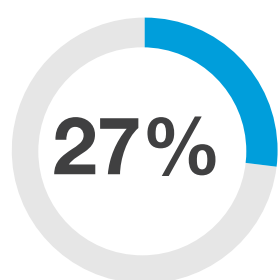
# Australia businesses give most methods of communication a higher Net Promoter Score® (NPS®) than consumers

Largest gaps are for IVR, automated assistant / chatbot, email, text and social media.

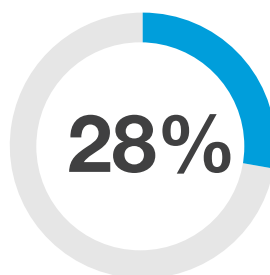


CH5. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel? CH6. For each method below that your customers can interact with the company in a 'Self-service' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel?

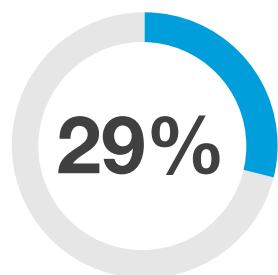
# Businesses in Australia give online chat relatively higher ratings across the board and online chat is a method that consumers like to use



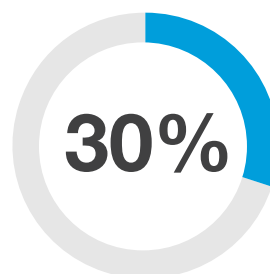
Of businesses say their customers are **highly satisfied\*** with online chat (in line with 45% of consumers who say they are highly satisfied with chat)



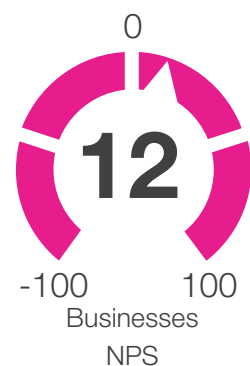
Of businesses say **customers are highly likely to recommend\*** online chat



Of businesses say **online chat is extremely easy\*** for customers



Of businesses **say online chat is very successful\*** at resolving customer issues on the first go



Businesses give online chat an NPS® score of 12 and consumers award chat an NPS score of 22, **top-tier NPS scores among 11 methods tested**

**Australia businesses may be underestimating how much consumers like online chat.**

Online chat is the only method of communication in which the consumer NPS score is higher than the business NPS score.

More than half of Australian consumers say online chat is in their top 3 most preferred methods of communication.

\*highly satisfied, extremely easy, highly likely to recommend, very successful are defined as a 9 or 10 rating on a scale of 1-10.

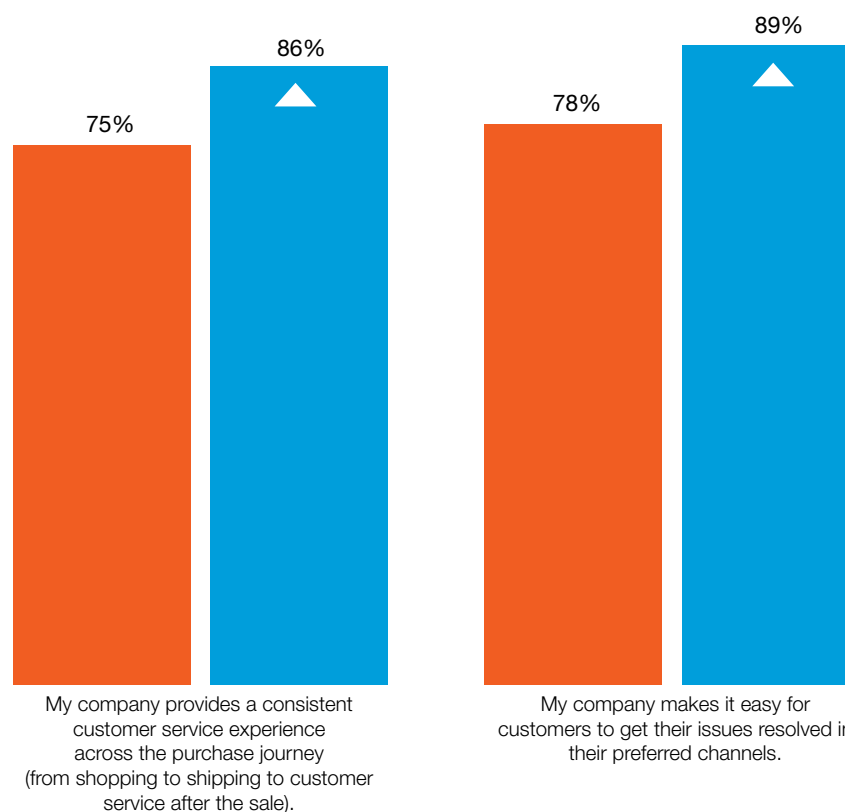
# Businesses in Australia overestimate CX success in two key areas of consistency and resolution

Businesses in Australia are more likely than consumers to agree on positives about their customer service such as:

My company provides a consistent customer service experience across the purchase journey

My company makes it easy for customers to get issues resolved in their preferred channels

**Channel Attitudes:** Somewhat + Strongly Agree



Consumer

Business

Significantly Higher

Significantly Lower

CA1-11 For each of the statements below, indicate how strongly you agree or disagree. Please select one per row. White arrows indicate statistically significant difference at the 95% confidence level.

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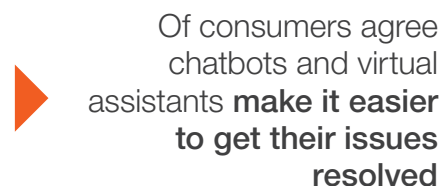
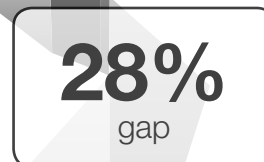
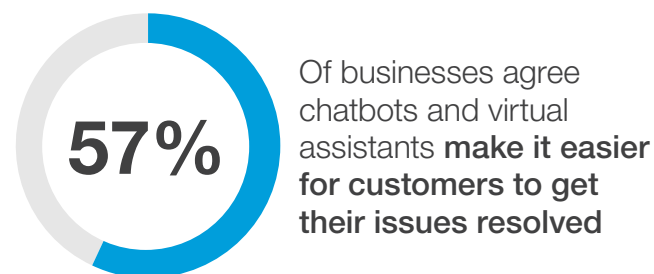
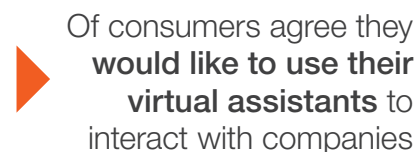
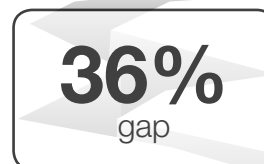
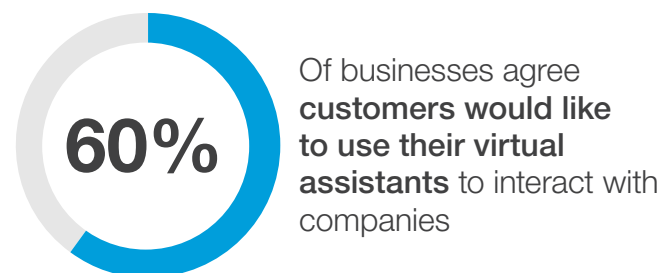


# Businesses in Australia feel consumers want more AI, yet consumers tell a different story

Consumers and businesses in Australia are in agreement that **customers want to be informed if they are interacting with a chatbot/virtual assistant** and that **customers would prefer to interact with a live agent**.

However, businesses feel customers are interested in using AI, and find it easy to use these technologies...

...At statistically significantly higher rates than US customers actually feel.



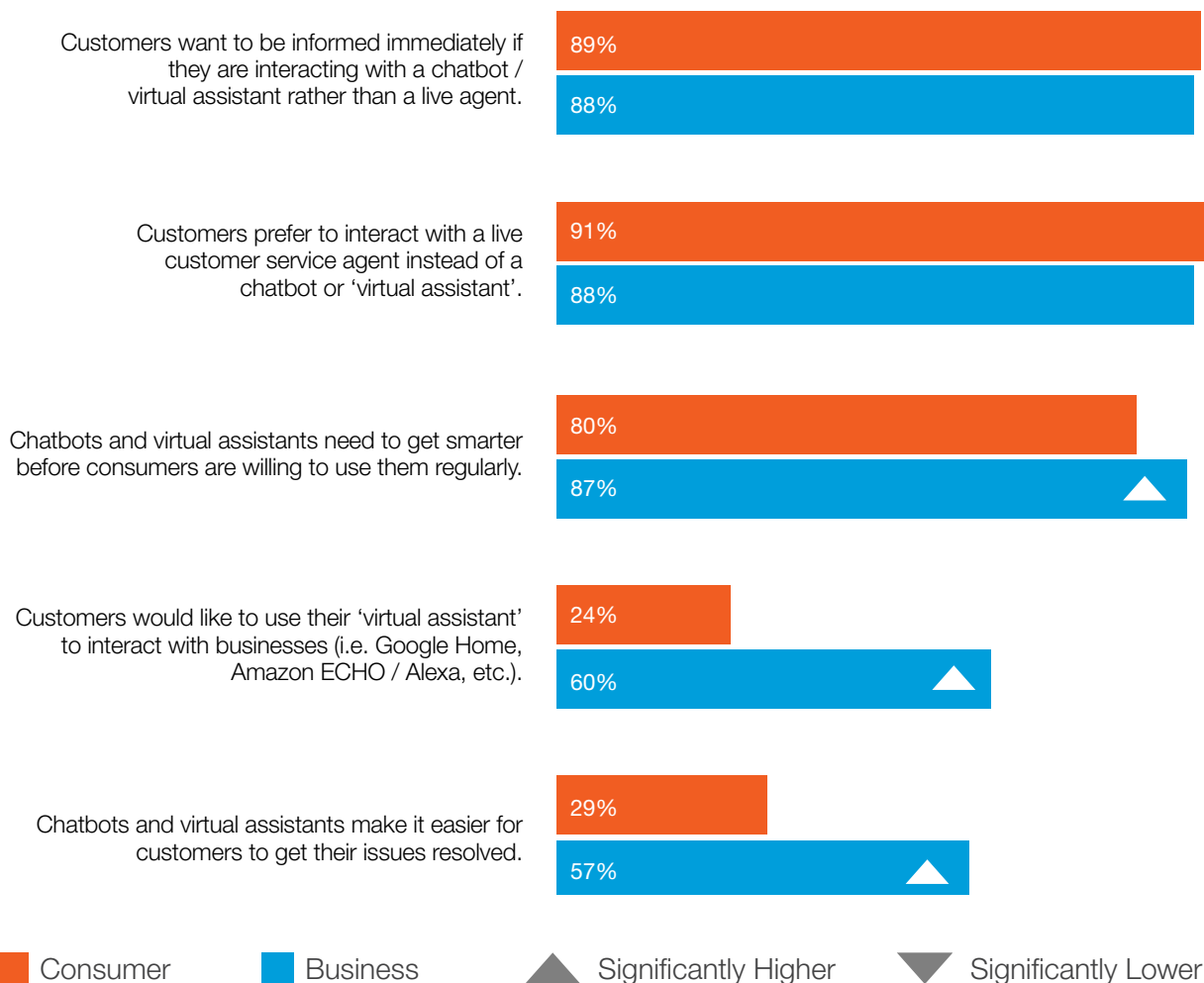
# Businesses in Australia have differing perceptions of AI than consumers

Businesses and consumers in Australia agree that customers want to be informed if they are interacting with a chatbot and that customers prefer to interact with a person.

Businesses are significantly more likely to agree that chatbots and virtual assistants need to get smarter before consumers are willing to use them regularly.

Yet, businesses are significantly more likely to agree that customers would like to use their virtual assistants to interact with them, and that chatbots make it easier for customers to get their issues resolved.

## AI Perceptions: Somewhat + Strongly Agree

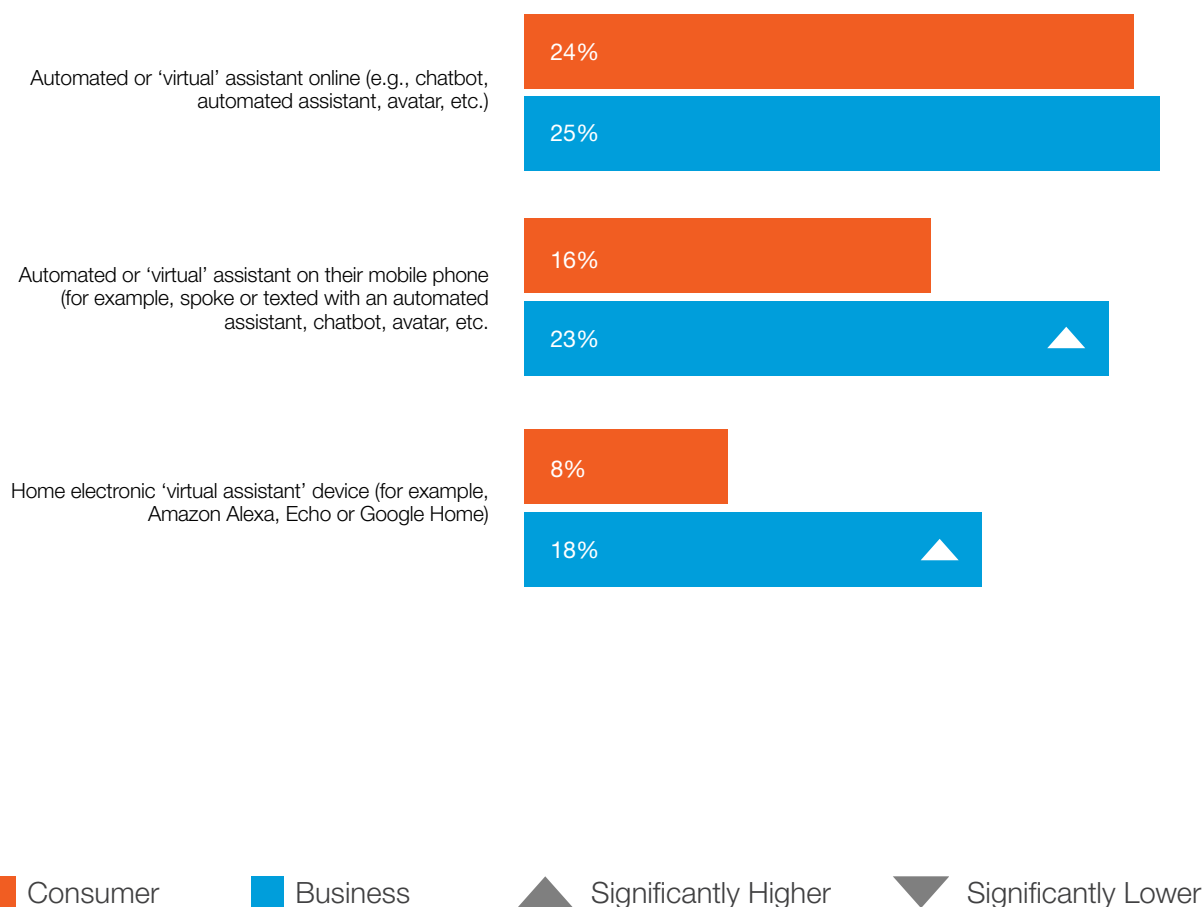


AI2.1-6. For each of the statements below, indicate how strongly you agree or disagree.  
White arrows indicate statistically significant difference at the 95% confidence level.

# Businesses in Australia overestimate consumer use of Artificial Intelligence (AI) for any purpose

Compared to reported usage by consumers, businesses report significantly higher customer usage of automated or virtual assistants on mobile phones and of home electronic virtual assistant devices.

## AI Usage: Percentage of Customers That Have Ever Used Technologies



AI1.1 In your estimation, what percentage of your customers have ever used each of the following "automated" or "artificial intelligence" technologies?  
White arrows indicate statistically significant difference at the 95% confidence level.

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2019 CX Transformation Benchmark

# United Kingdom Businesses 2019 Research

Including comparison with  
2018 CX Transformation Benchmark, Consumer Wave

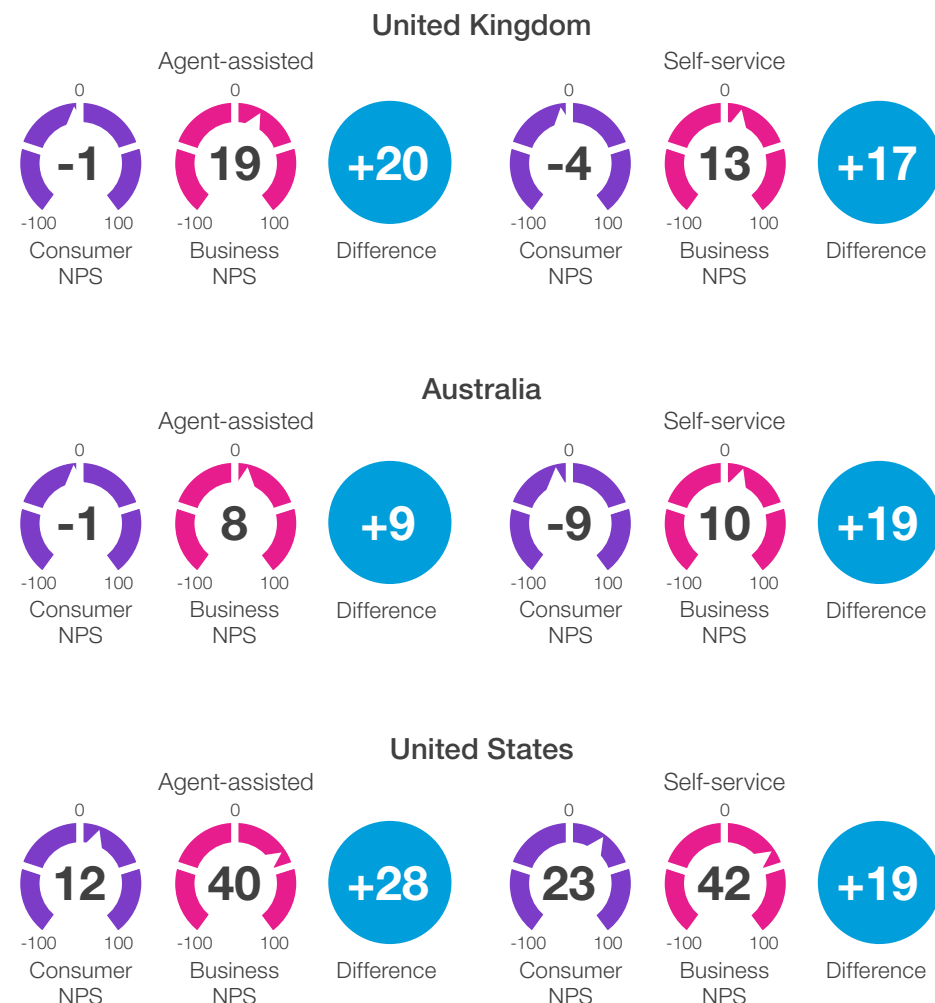


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# United Kingdom Major Findings

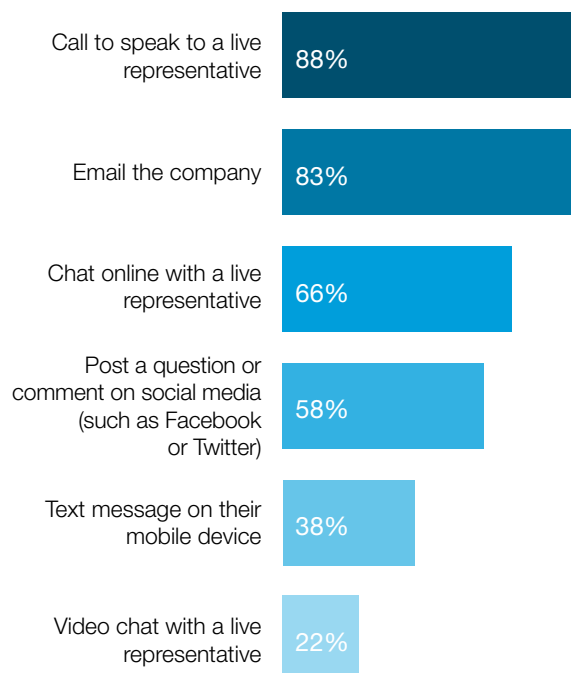
- Nearly all UK businesses offer their customers phone, email and websites as methods of communication.
- Overall, UK businesses report the highest satisfaction with online chat. They overestimate customer satisfaction with IVR.
- Both UK businesses and consumers prefer talking to a live representative over other forms of communication. Customers prefer website, email and online chat more than businesses do.
- UK businesses believe they are doing better than consumers do in two key areas — delivering consistency across the customer experience journey and making it easy to get issues resolved in preferred channels.
- UK businesses are optimistic about AI, but they misjudge consumer perceptions of Artificial Intelligence. UK businesses are significantly more likely to believe that consumers want more AI in customer service than what consumers report.
- UK businesses give every method of communication except mobile app a higher Net Promotor Score® than consumers.
  - NPS varied by country with significant differences



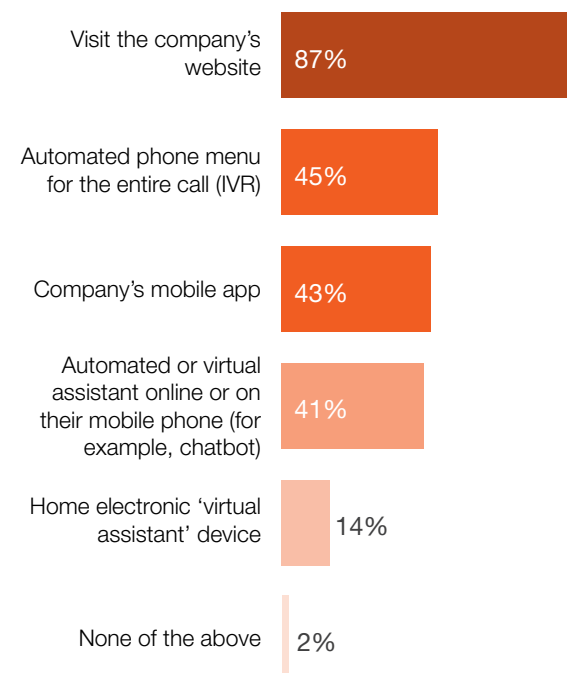
# Nearly all UK organisations offer phone, website and email

The most popular form of communication offered by UK businesses is phone followed closely by website. Email is also offered by the vast majority of organisations.

## Agent-assisted Methods of Communicating with Customers



## Self-service Methods of Communicating with Customers



Agent-assisted  
Self-service

CC1A. In which 'Agent-assisted' ways does your company communicate or interact with customers? Please select all that apply.

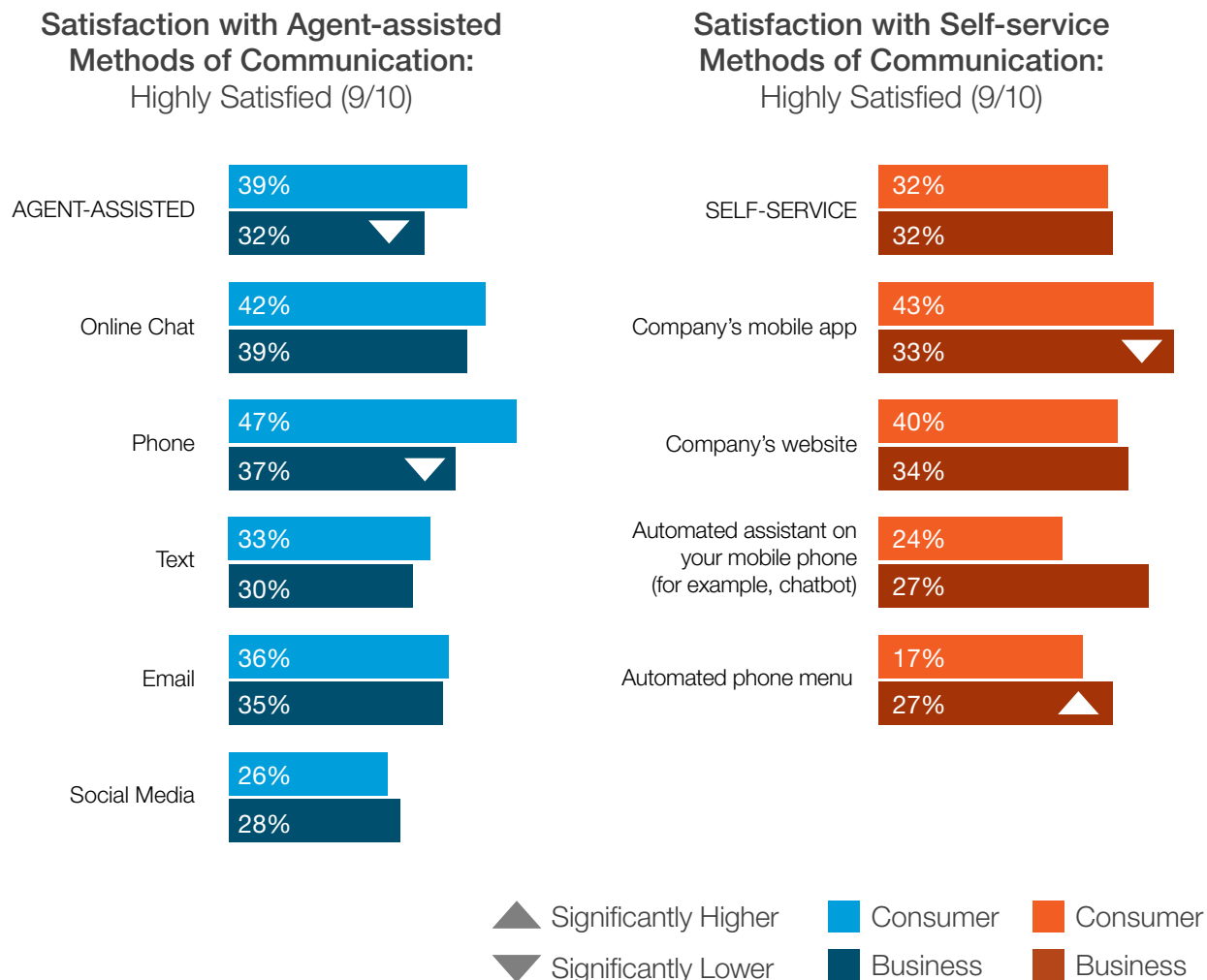
CC1B. In which 'Self-service' ways does your company communicate or interact with customers? Please select all that apply. \*Wording changed for responses between 2017 and 2018.

White arrows indicate statistically significant difference at the 95% confidence level.

# UK businesses underestimate phone, mobile app, and agent-assisted overall satisfaction, while overestimating IVR satisfaction

UK businesses are significantly less likely to say customers are satisfied with phone and mobile app communication compared to consumers' reported satisfaction.

On the contrary, they rate their customers' satisfaction with automated phone menus significantly higher than customers do.



CH1. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, overall how satisfied are customers with this method of communication during their experience? CH2. For each method below that your customers can interact with the company in a 'Self-service' fashion, overall how satisfied are customers with this method of communication during their experience?

White arrows indicate statistically significant difference at the 95% confidence level.

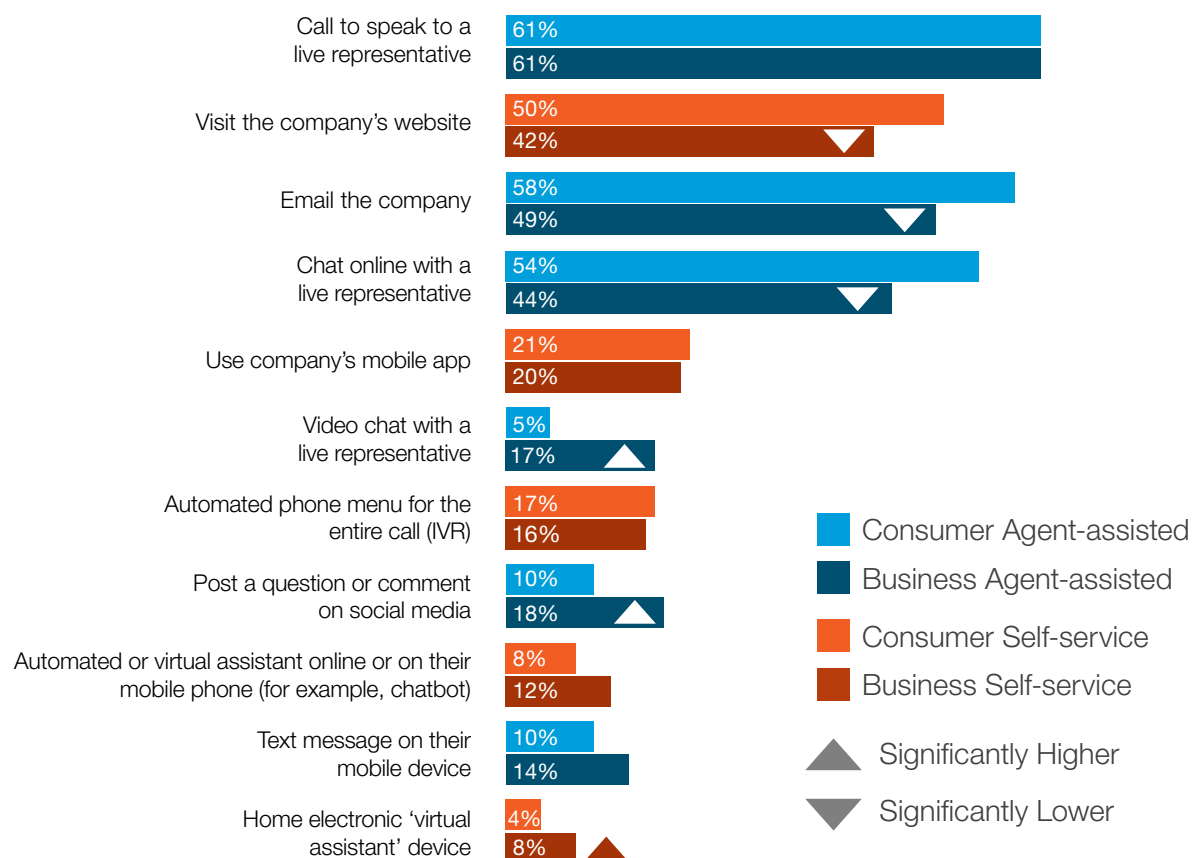


# UK consumers prefer website, email and phone more than businesses perceive they do

UK consumers are significantly more likely to give website, email and chat a top 3 ranking than businesses.

Conversely, UK businesses are significantly more likely to prefer interacting with their customers via video chat, social media, and/or home electronic virtual assistants.

## Preferred Way to Interact with Customers: Top 3 Ranking



CP1. Please rank the top three ways that your company would prefer to interact with a customer during a service experience from the list below. White/orange arrows indicate statistically significant difference at the 95% confidence level.

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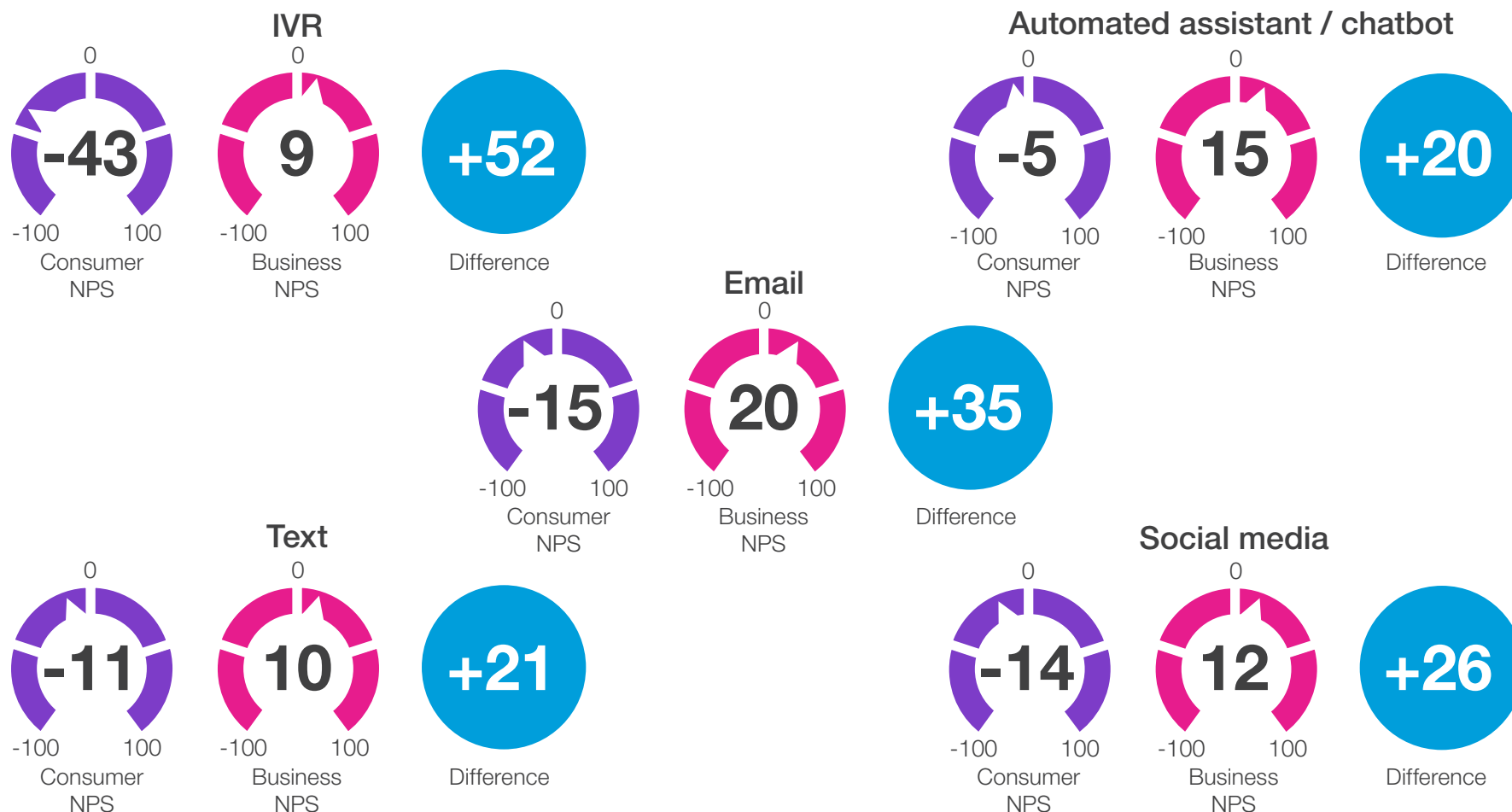
UK businesses give every method except mobile app a higher Net Promoter Score® when asked to rate how likely consumers would be to recommend their company

Method	Consumer NPS	Business NPS	Difference
<b>Agent-assisted</b>	<b>-1</b>	<b>19</b>	<b>+20</b>
Video chat	n/a	27	n/a
Online chat	16	25	+9
Text	-11	10	+21
Phone	9	20	+11
Email	-15	20	+35
Social media	-14	12	+26
<b>Self-service</b>	<b>-4</b>	<b>13</b>	<b>+17</b>
Mobile app	25	17	-8
Automated assistant / chatbot	-5	15	+20
Website	9	14	+5
IVR	-43	9	+52
Home electronic assistant	n/a	0	n/a

CH5. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel? CH6. For each method below that your customers can interact with the company in a 'Self-service' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel?

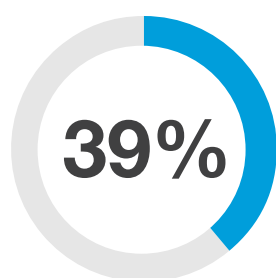
# UK businesses give almost every method of communication a higher Net Promoter Score® (NPS®) than consumers

Largest gaps are for IVR, automated assistant / chatbot, email, text and social media.

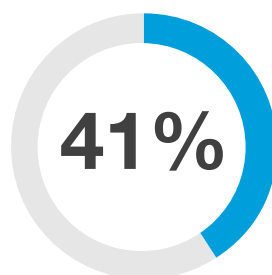


CH5. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel? CH6. For each method below that your customers can interact with the company in a 'Self-service' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel?

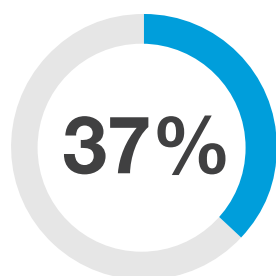
# UK businesses give online chat positive ratings, in line with consumers' positive perceptions



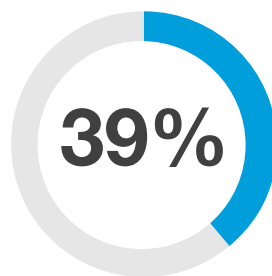
Of businesses say their customers are **highly satisfied\*** with online chat (in line with 42% of consumers who say they are highly satisfied with chat)



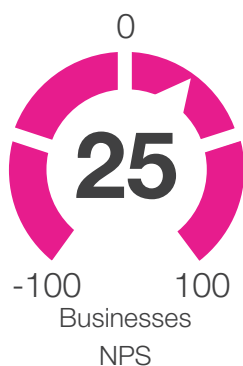
Of businesses say customers are **highly likely to recommend\*** online chat



Of businesses say **online chat is extremely easy\*** for customers



Of businesses **say online chat is very successful\*** at resolving customer issues on the first go



Businesses give online chat an NPS® score of 25 and consumers award chat an NPS score of 16, **top-tier NPS scores among 11 methods tested**

Consumers validate businesses' perceptions of online chat and may love it even more than businesses realise.

UK consumers give online chat the second highest NPS score of all methods tested.

Compared to businesses' evaluation of consumers' perceptions of chat, UK consumers are significantly more likely to say chat is one of their top 3 preferred methods of communication.

\*highly satisfied, extremely easy, highly likely to recommend, very successful are defined as a 9 or 10 rating on a scale of 1-10.

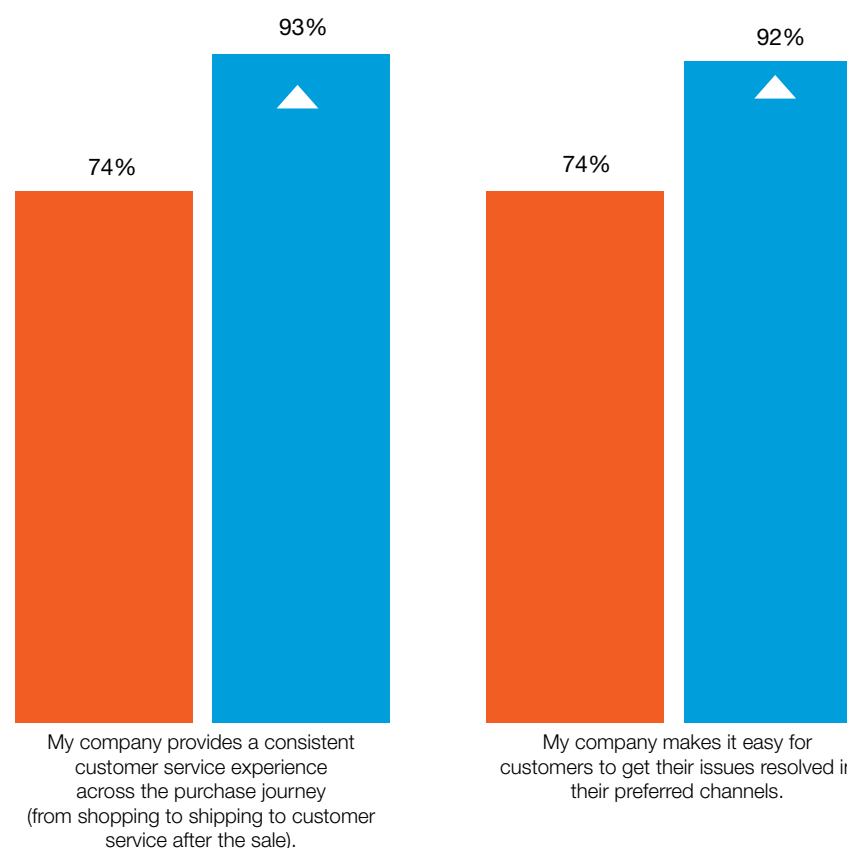
# UK businesses misjudge their CX success in two vital areas of consistency and resolution

Compared to consumers, UK businesses are more likely to agree on positives about their customer service such as:

My company provides a consistent customer service experience across the purchase journey.

My company makes it easy for customers to get issues resolved in their preferred channels.

**Channel Attitudes:** Somewhat + Strongly Agree



Consumer

Business

Significantly Higher

Significantly Lower

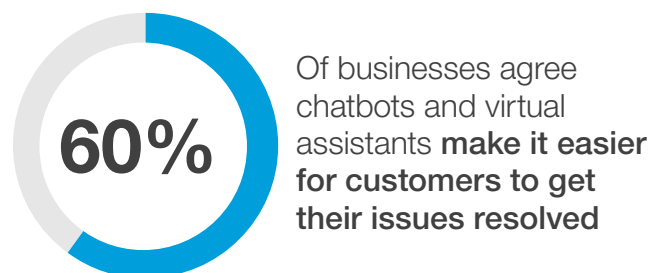
CA1-11 For each of the statements below, indicate how strongly you agree or disagree. Please select one per row. White arrows indicate statistically significant difference at the 95% confidence level.

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# UK businesses believe consumers want more AI — when they may not

UK consumers and businesses are in agreement that **customers want to be informed if they are interacting with a chatbot/virtual assistant** and that **customers would prefer to interact with a live agent**.

UK businesses tend to believe customers are interested in using AI, and find it easy to use these technologies...



**40%**  
gap

...At statistically significantly higher rates than UK customers actually feel.

Of consumers agree they **would like to use their virtual assistants** to interact with companies

**28%**

Of consumers agree chatbots and virtual assistants **make it easier to get their issues resolved**

**33%**

**27%**  
gap

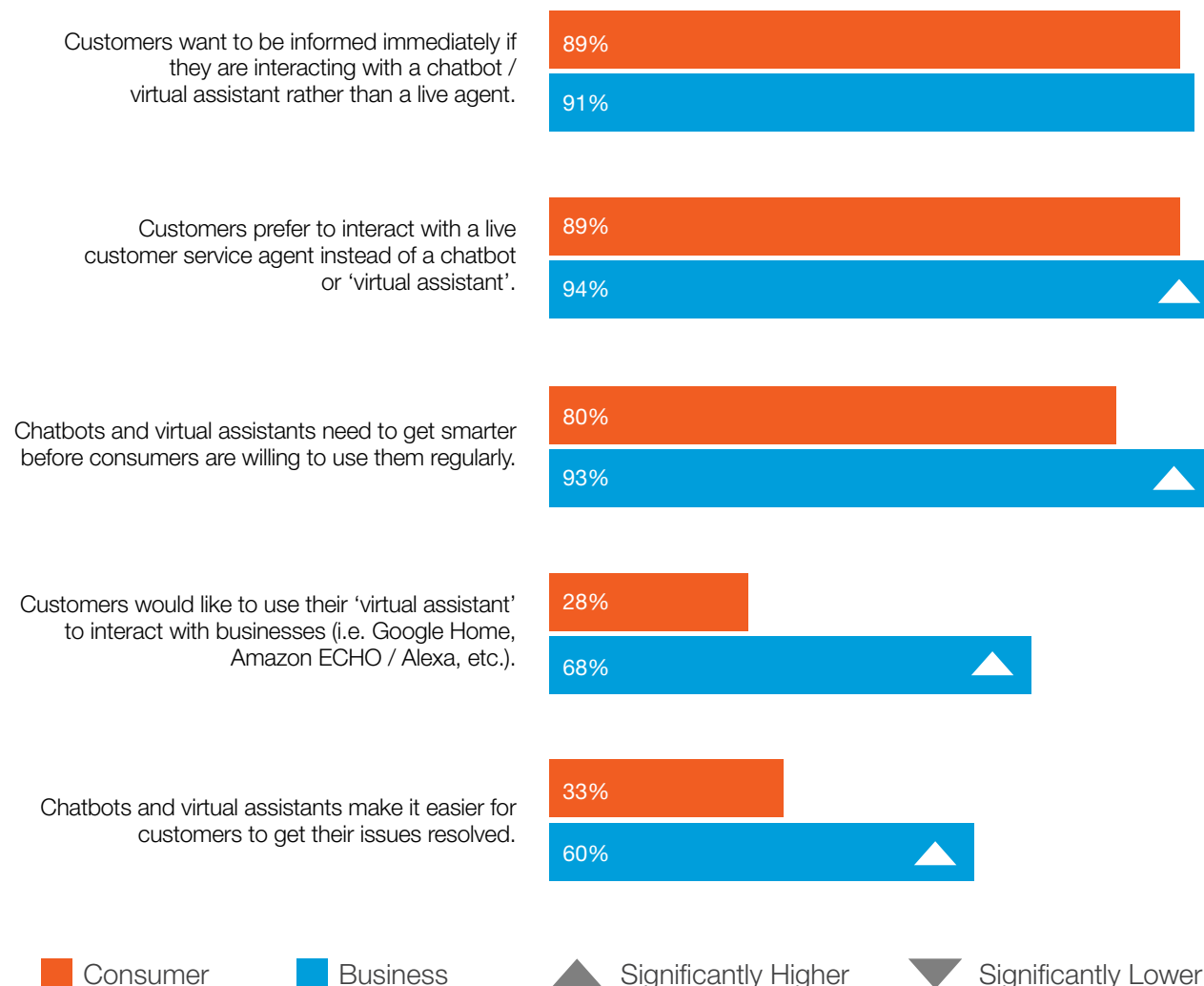
# UK businesses have different perceptions of AI than customers

UK businesses and consumers agree that customers want to be informed if they are interacting with a chatbot and that customers prefer to interact with a person. Businesses are even more likely to feel that customers want to interact with a live person.

Businesses are significantly more likely to agree that chatbots and virtual assistants need to get smarter before consumers are willing to use them regularly, indicating there is some understanding of AI's hurdles.

Yet, businesses are significantly more likely to agree that customers would like to use their virtual assistants to interact with them, and that chatbots make it easier for customers to get their issues resolved.

## AI Perceptions: Somewhat + Strongly Agree



AI2.1-6. For each of the statements below, indicate how strongly you agree or disagree.  
White arrows indicate statistically significant difference at the 95% confidence level.

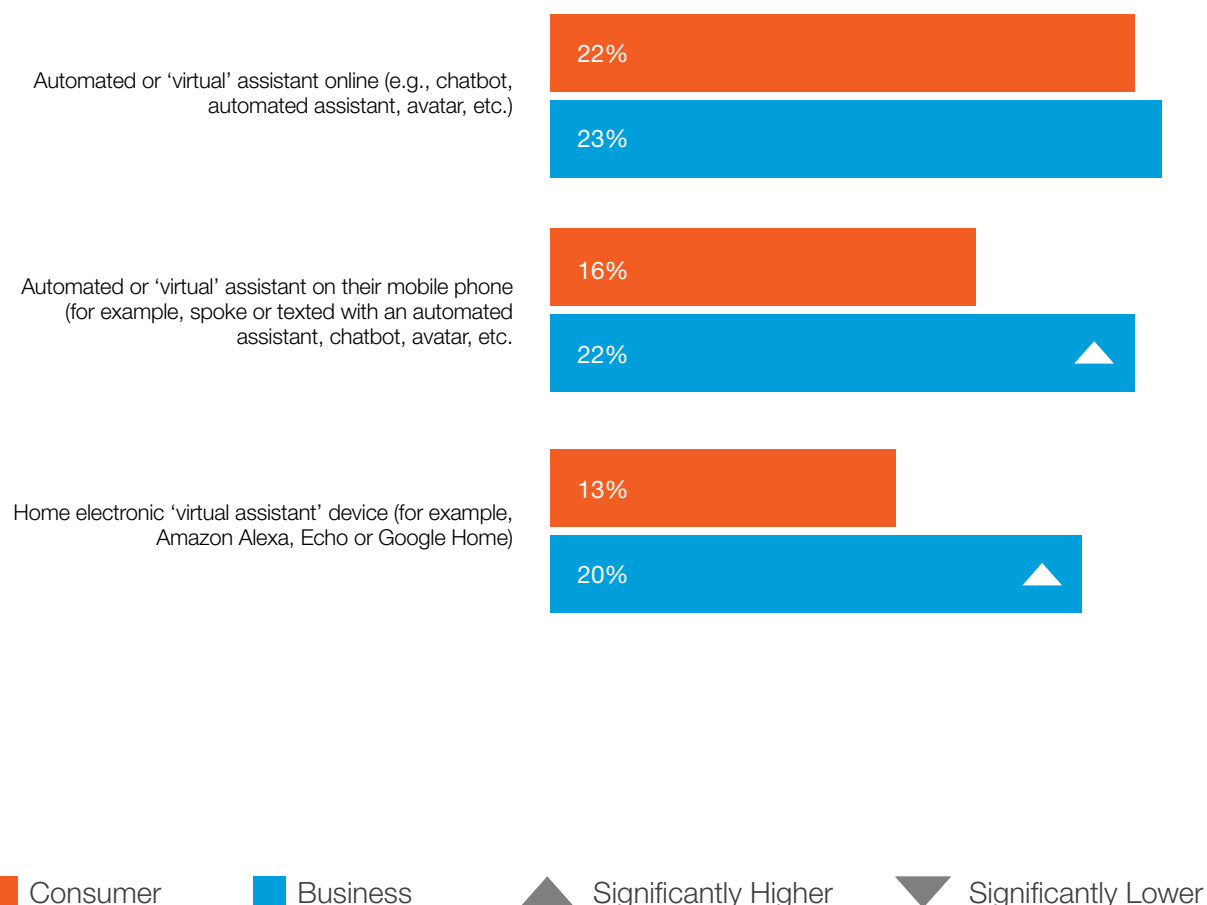
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# UK businesses overestimate consumer use of Artificial Intelligence (AI) for any purpose

Compared to reported usage by consumers, UK businesses report significantly higher percentages of customer usage of AI for automated or virtual assistants on mobile phones and home electronic virtual assistant devices.

**AI Usage:** Percentage of Customers That Have Ever Used Technologies



AI1.1 In your estimation, what percentage of your customers have ever used each of the following "automated" or "artificial intelligence" technologies?  
 White arrows indicate statistically significant difference at the 95% confidence level.

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2019 CX Transformation Benchmark

# United States Businesses 2019 Research

Including comparison with  
2018 CX Transformation Benchmark, Consumer Wave

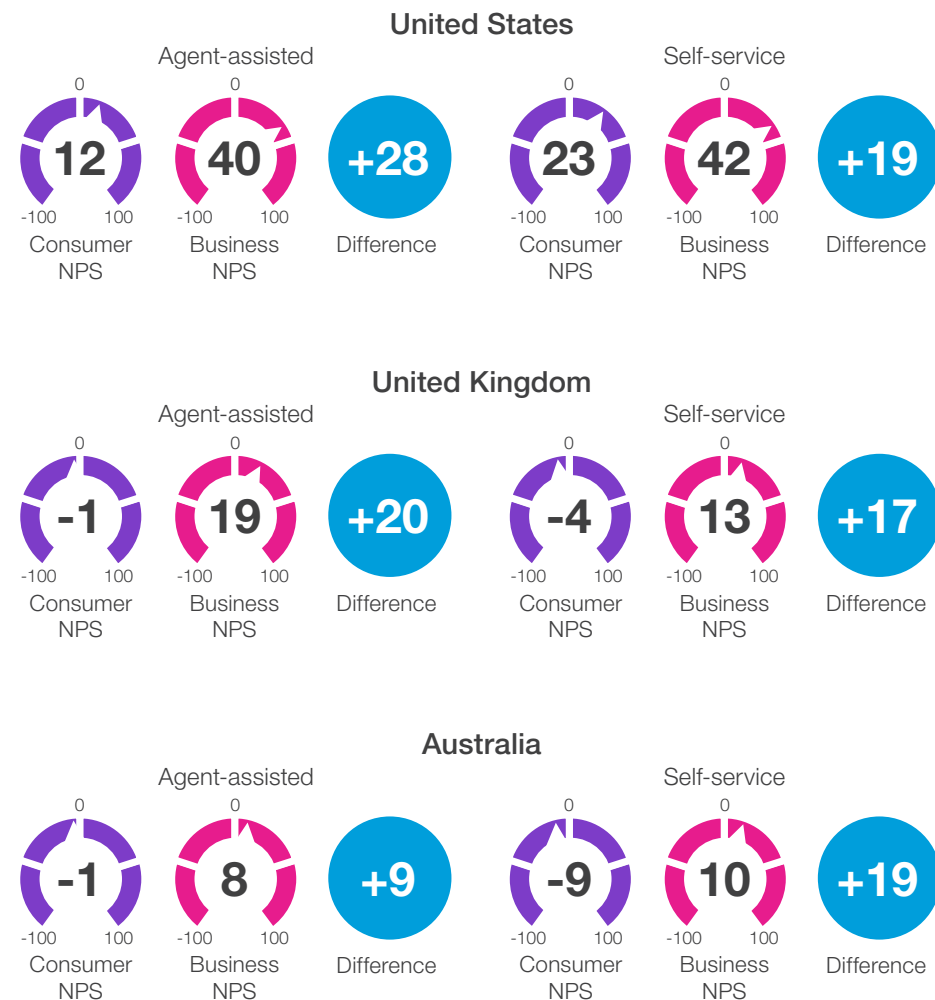


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# United States Major Findings

- Most US organisations offer phone, email, chat and social media. The majority offer websites as well.
- Compared to other regions, US businesses report higher metrics (satisfaction, NPS®, ease of use) for all channels tested as compared to US consumers.
- US businesses and consumers prefer most to interact via phone, chat and website.
- US businesses feel especially positive about online chat, and increasingly so. The proportion of businesses offering online chat, the proportion of consumers using online chat and top 3 preference of online chat have all significantly increased since 2017.
- US businesses believe they are doing better than consumers do in two key areas — delivering consistency across the customer experience journey and making it easy to get issues resolved in preferred channels.
- US businesses are optimistic about AI. While US businesses and consumers are in agreement in some areas regarding Artificial Intelligence, US businesses believe customers are interested in using AI and find it easy to use these technologies at statistically significantly higher rates than US customers actually feel.
- US businesses give every method of communication a higher Net Promotor Score® than consumers.
  - NPS varied by country with significant differences

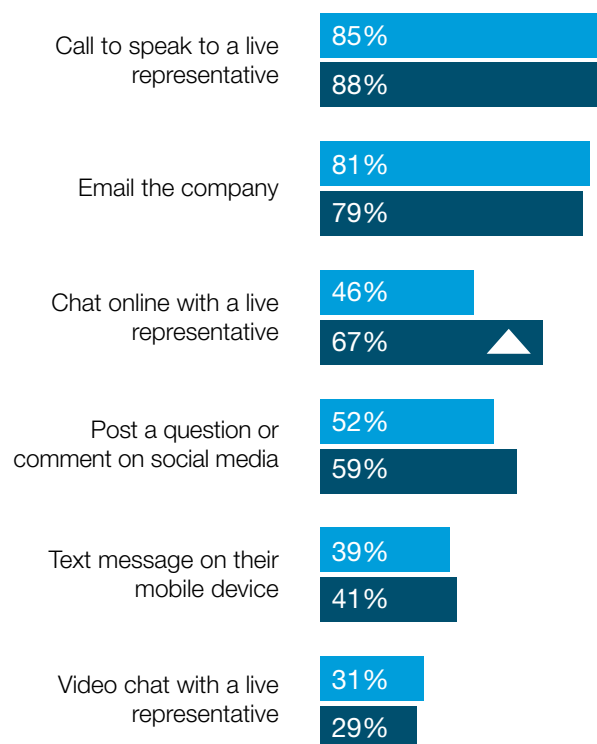


# US organisations report an increase in offering online chat and online assistants / chatbots, and a drop in IVR

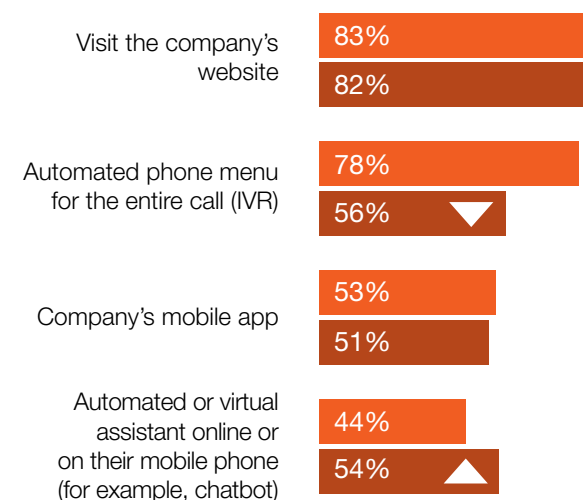
Compared to 2017, significantly more US organisations say they offer online chat with a live representative and online assistant / chatbot.

Significantly fewer say they allow customers to use an automated phone menu for the entire call.

## US Tracking Year-over-Year: Agent-assisted Methods of Communicating with Customers



## US Tracking Year-over-Year: Self-service Methods of Communicating with Customers



■ 2017 ■ 2017  
■ 2018 ■ 2018

▲ Significantly Higher  
▼ Significantly Lower

CC1A. In which 'Agent-assisted' ways does your company communicate or interact with customers? Please select all that apply.

CC1B. In which 'Self-service' ways does your company communicate or interact with customers? Please select all that apply. \*Wording changed for responses between 2017 and 2018.

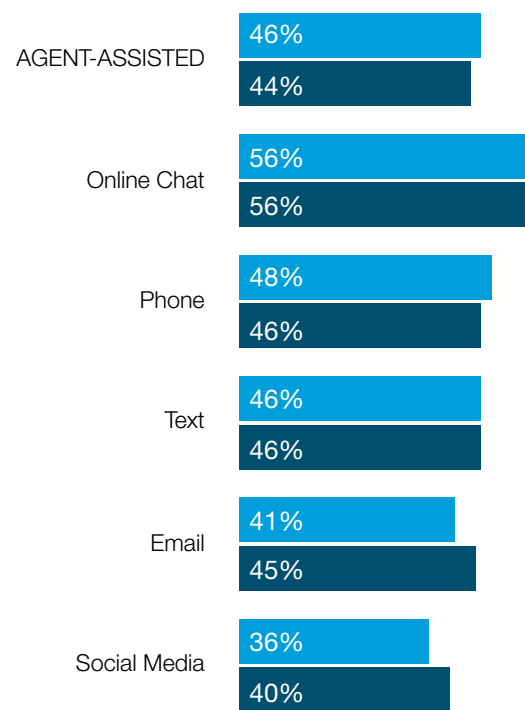
White arrows indicate statistically significant difference at the 95% confidence level.

# US businesses overestimate satisfaction with chatbots

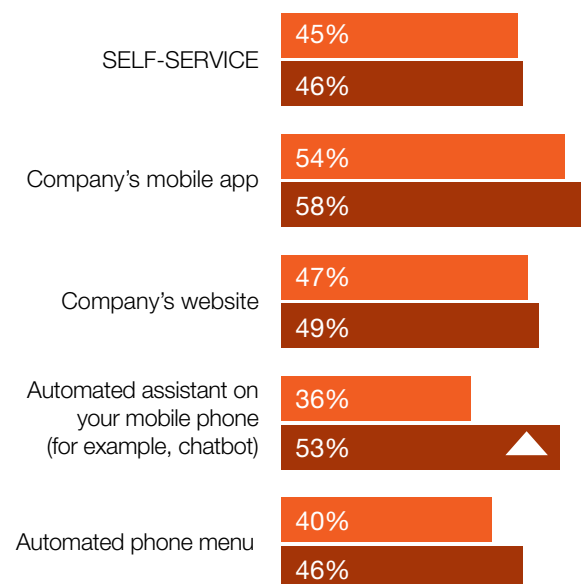
US businesses, for the most part, are aligned with consumers on satisfaction.

Compared to consumers, US businesses are more likely to say customers are highly satisfied with automated assistants / chatbots.

## Satisfaction with Agent-assisted Methods of Communication: Highly Satisfied (9/10)



## Satisfaction with Self-service Methods of Communication: Highly Satisfied (9/10)



Significantly Higher   
 Consumer   
 Consumer  
 Significantly Lower   
 Business   
 Business

CH1. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, overall how satisfied are customers with this method of communication during their experience? CH2. For each method below that your customers can interact with the company in a 'Self-service' fashion, overall how satisfied are customers with this method of communication during their experience?

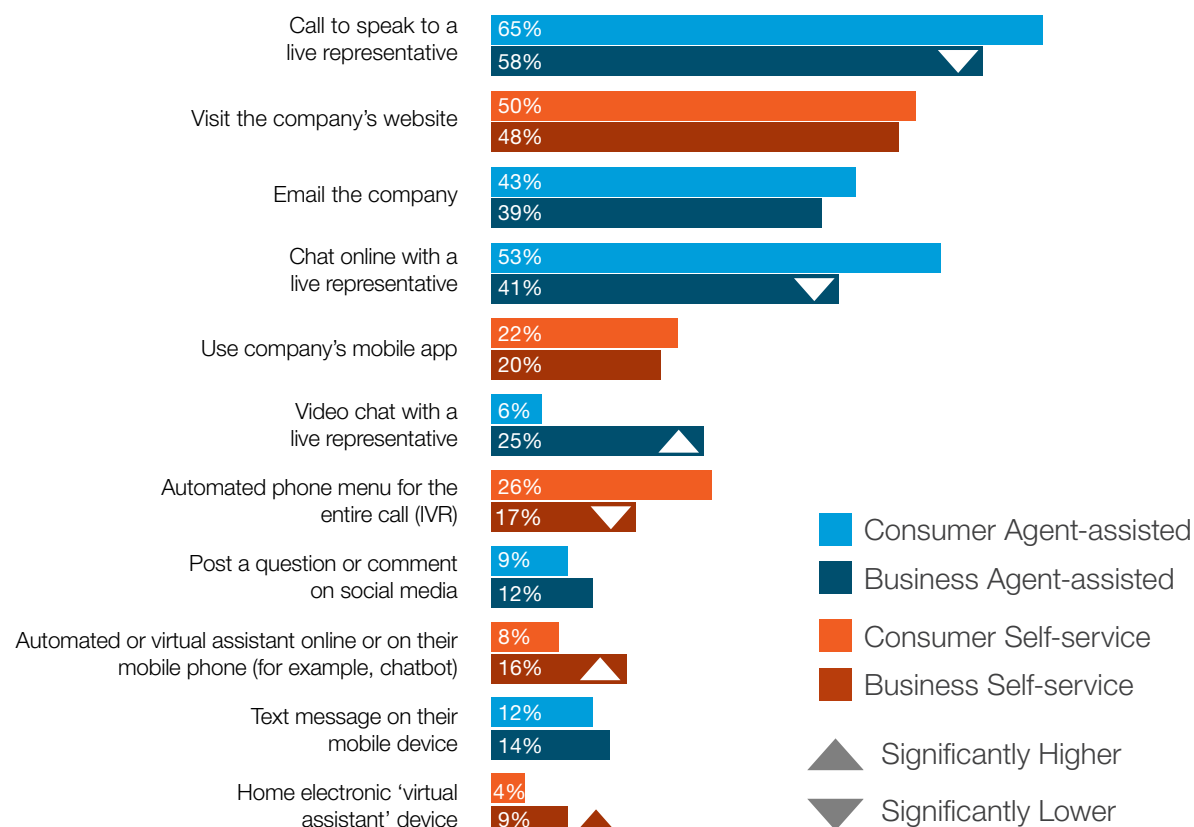
White arrows indicate statistically significant difference at the 95% confidence level.

# US consumers prefer phone, online chat and IVR more than businesses perceive they do

US consumers are significantly more likely to put phone, online chat, and IVR in their top 3 preferred ways to communicate than businesses.

Conversely, US businesses are significantly more likely to prefer interacting with their customers via video chat, virtual assistant / chatbot and/or home electronic virtual assistants.

## Preferred Way to Interact with Customers: Top 3 Ranking



CP1. Please rank the top three ways that your company would prefer to interact with a customer during a service experience from the list below. White/orange arrows indicate statistically significant difference at the 95% confidence level.

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US businesses give every method a higher Net Promoter Score® when asked to rate how likely consumers would be to recommend their company

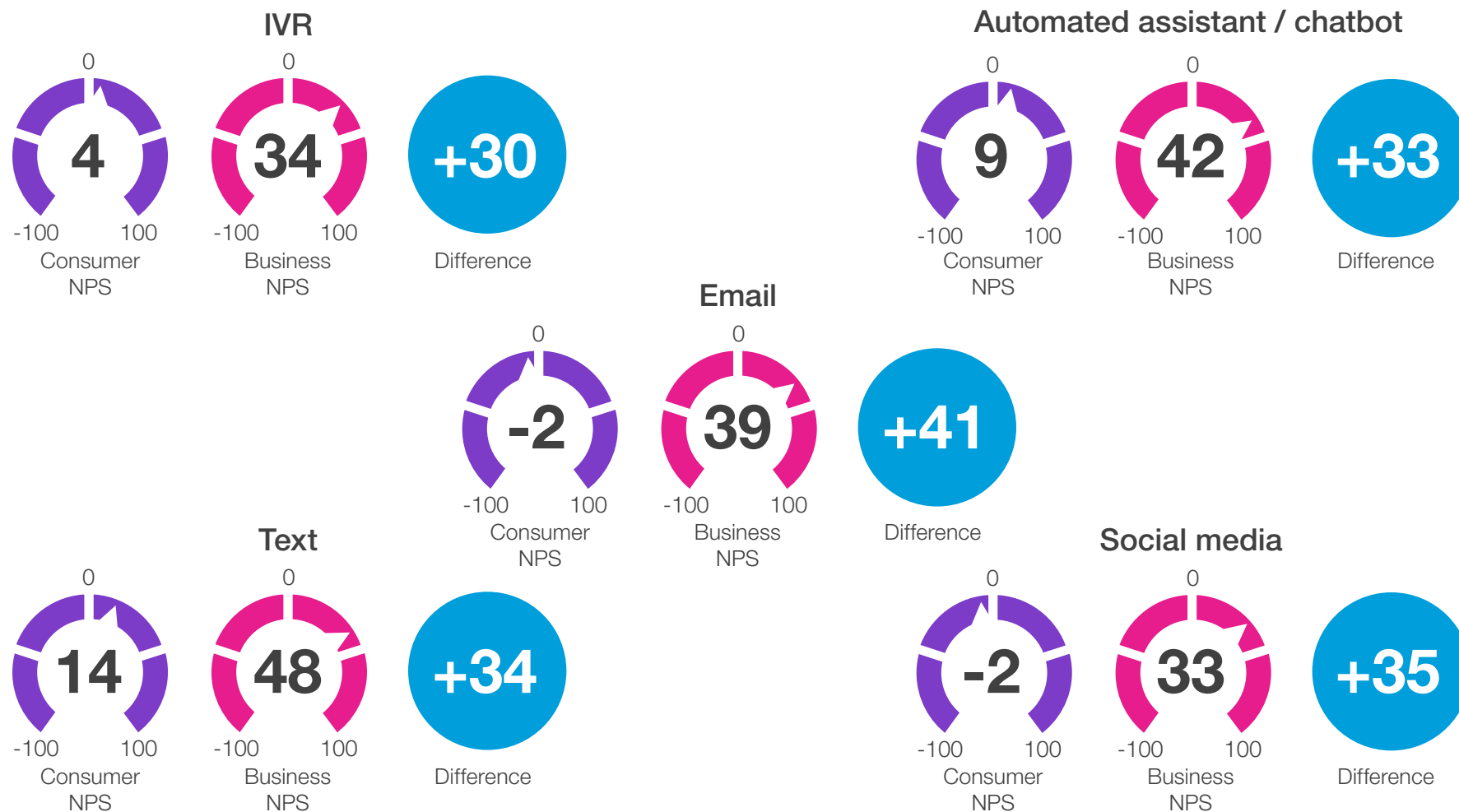
Method	Consumer NPS	Business NPS	Difference
<b>Agent-assisted</b>	<b>12</b>	<b>40</b>	<b>+28</b>
Video chat	n/a	51	n/a
Online chat	28	39	+11
Text	14	48	+34
Phone	19	39	+20
Email	-2	39	+41
Social media	-2	33	+35
<b>Self-service</b>	<b>23</b>	<b>42</b>	<b>+19</b>
Mobile app	38	48	+10
Automated assistant / chatbot	9	42	+33
Website	25	40	+15
IVR	4	34	+30
Home electronic assistant	n/a	49	n/a

CH5. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel? CH6. For each method below that your customers can interact with the company in a 'Self-service' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel?



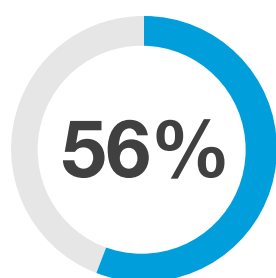
# US businesses give every method of communication a higher Net Promoter Score® (NPS®) than consumers

Largest gaps are for IVR, automated assistant / chatbot, email, text and social media.

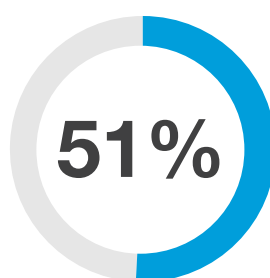


CH5. For each method below that your customers can interact with the company in an 'Agent-assisted' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel? CH6. For each method below that your customers can interact with the company in a 'Self-service' fashion, how would you rate how likely customers would be to recommend your company to others if asked by family, friends or colleagues, based on their experience with that channel?

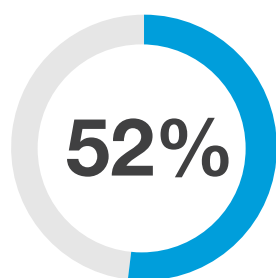
# US businesses are especially positive about online chat and online chat is a method that consumers like to use



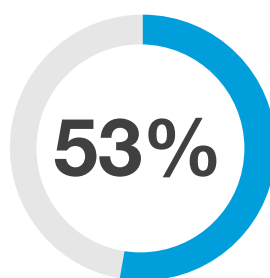
Of businesses say their customers are **highly satisfied\*** with online chat (in line with 56% of consumers who say they are highly satisfied with chat)



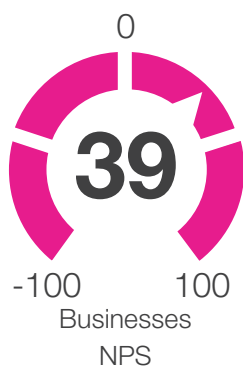
Of businesses say customers are **highly likely to recommend\*** online chat



Of businesses say **online chat is extremely easy\*** for customers



Of businesses **say online chat is very successful\*** at resolving customer issues on the first time



Businesses give online chat an NPS® score of 39 and consumers award chat an NPS score of 28, **top-tier NPS scores among 11 methods tested**

**US consumers validate businesses' perceptions of online chat and may love it even more than businesses realise.**

US consumers give online chat the second highest NPS score of all methods tested.

US consumers say they are highly satisfied with online chat more than any other method.

More than half of US consumers put online chat as one of their top 3 preferred methods of communication.

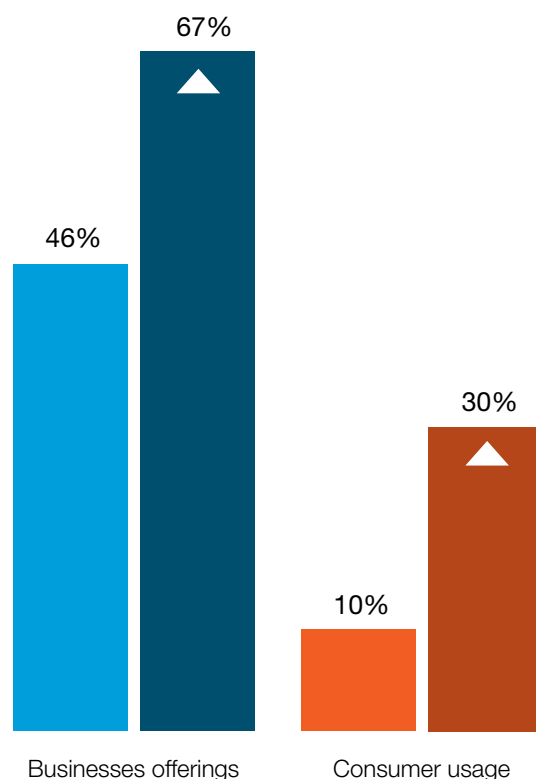
\*highly satisfied, extremely easy, highly likely to recommend, very successful are defined as a 9 or 10 rating on a scale of 1-10.

# Online chat in the US is offered and used more often, and is more likely to be preferred by businesses and consumers, year-over-year

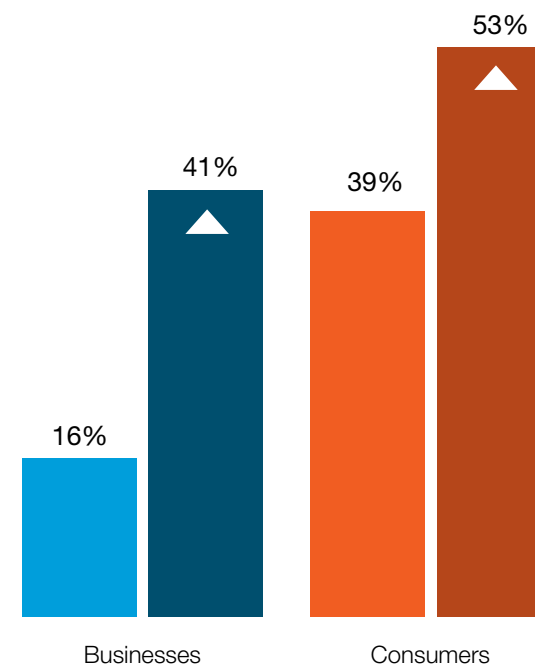
US businesses and consumers both report an increase in online chat, in offering / usage.

Both also are more likely to rank it as a top 3 preferred method of communication since 2017.

**US Tracking Year-over-Year:**  
Offer Online Chat Over Time



**US Tracking Year-over-Year:**  
Top 3 Rank Preference of  
Online Chat Over Time



2017  
2018

2017  
2018

CC1A. In which 'Agent-assisted' ways does your company communicate or interact with customers? Please select all that apply.  
CP1. Please rank the top three ways that your company would prefer to interact with a customer during a service experience from the list below.  
White arrows indicate statistically significant difference at the 95% confidence level.

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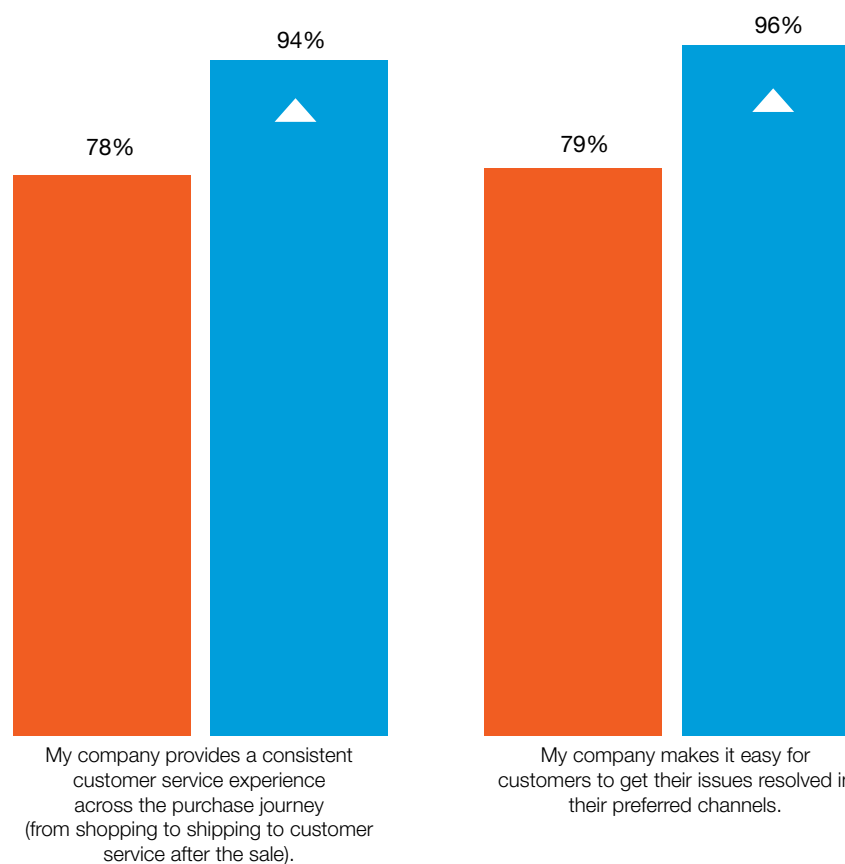
# US businesses overestimate CX success in two key areas of consistency and resolution

US businesses are more likely to agree on positives about their customer service such as:

My company provides a consistent customer service experience across the purchase journey.

My company makes it easy for customers to get issues resolved in their preferred channels.

**Channel Attitudes:** Somewhat + Strongly Agree



Consumer

Business

Significantly Higher

Significantly Lower

CA1-11 For each of the statements below, indicate how strongly you agree or disagree. Please select one per row. White arrows indicate statistically significant difference at the 95% confidence level.

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# US businesses falsely believe consumers want more AI

US consumers and businesses are in agreement that **customers want to be informed if they are interacting with a chatbot/virtual assistant** and that **customers would prefer to interact with a live agent**.

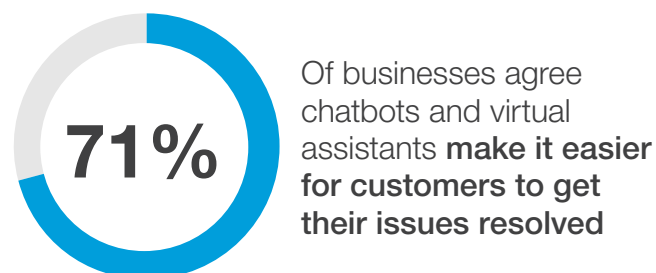
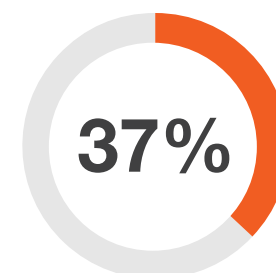
However, US businesses tend to believe customers are interested in using AI, and find it easy to use these technologies...

...At statistically significantly higher rates than US customers actually feel.



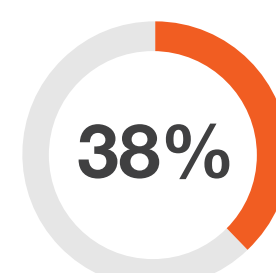
**37%**  
gap

Of consumers agree they **would like to use their virtual assistants** to interact with companies



**33%**  
gap

Of consumers agree chatbots and virtual assistants **make it easier to get their issues resolved**



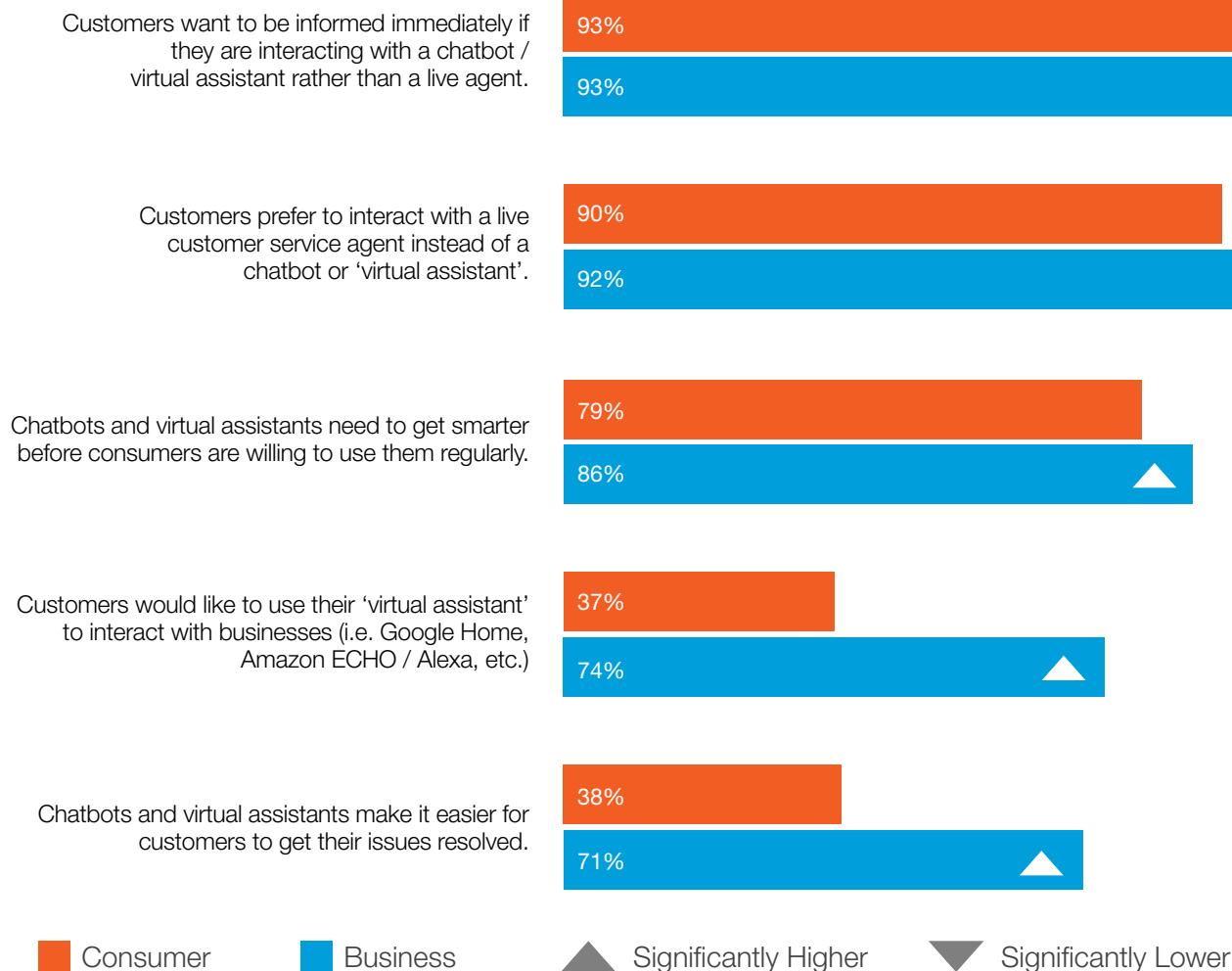
# US businesses have misconceptions about consumer AI perceptions

US businesses and customers agree in similar proportions that customers want to be informed if they are interacting with a chatbot and that customers prefer to interact with a person.

Businesses are significantly more likely to agree that chatbots and virtual assistants need to get smarter before consumers are willing to use them regularly.

However, businesses are significantly more likely to agree that customers would like to use virtual assistants to interact with them, and that chatbots make it easier for customers to get their issues resolved.

## AI Perceptions: Somewhat + Strongly Agree

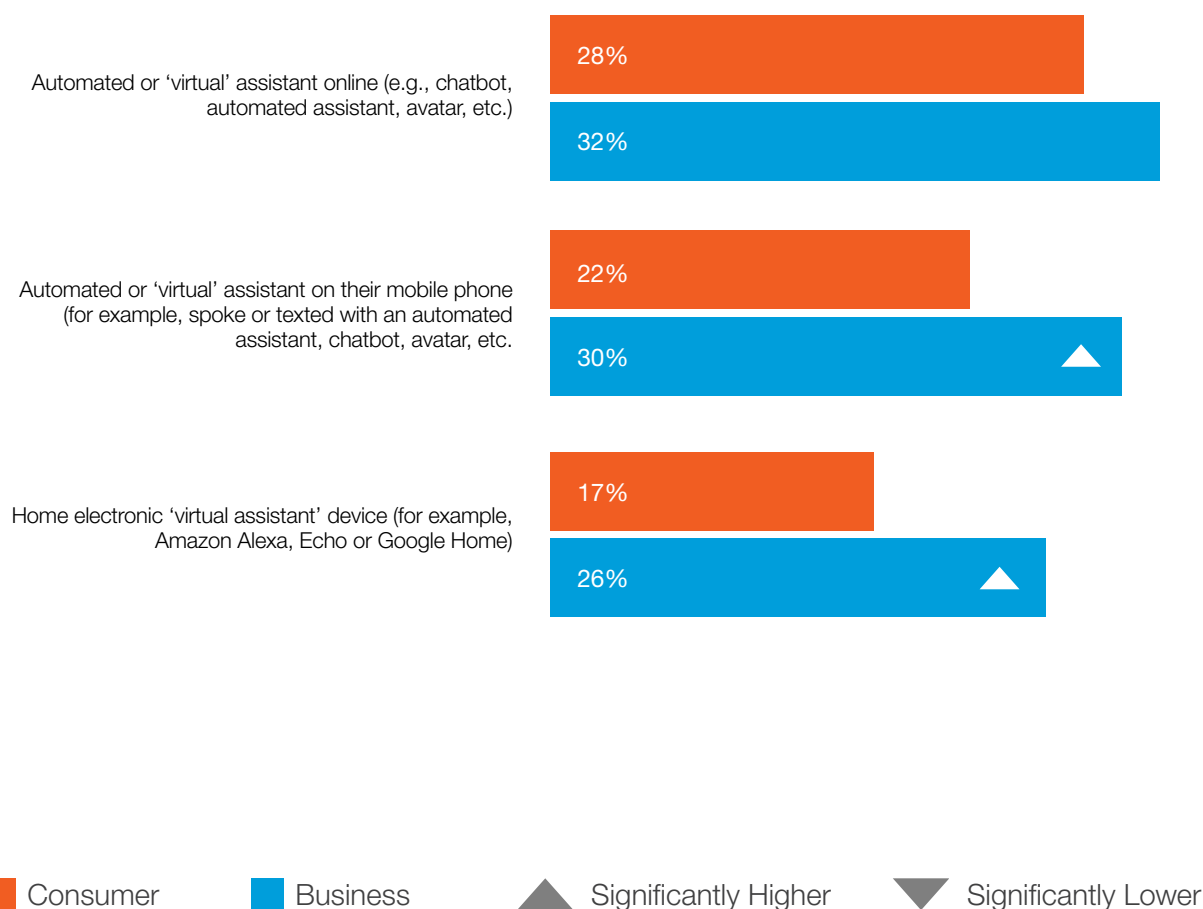


AI2.1-6. For each of the statements below, indicate how strongly you agree or disagree.  
White arrows indicate statistically significant difference at the 95% confidence level.

# US businesses overestimate consumer use of Artificial Intelligence (AI) for any purpose

Compared to reported usage by consumers, businesses report significantly higher percentages of customer usage of AI for both automated or virtual assistants on mobile phones and home electronic virtual assistant devices.

## AI Usage: Percentage of Customers That Have Ever Used Technologies



AI1.1 In your estimation, what percentage of your customers have ever used each of the following "automated" or "artificial intelligence" technologies?  
White arrows indicate statistically significant difference at the 95% confidence level.

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# Firmographics

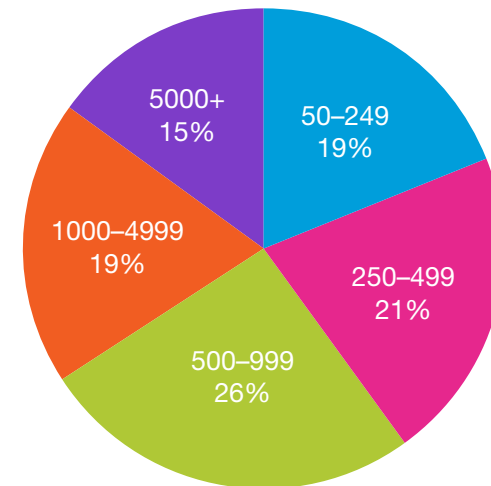


# Number of employees & stations

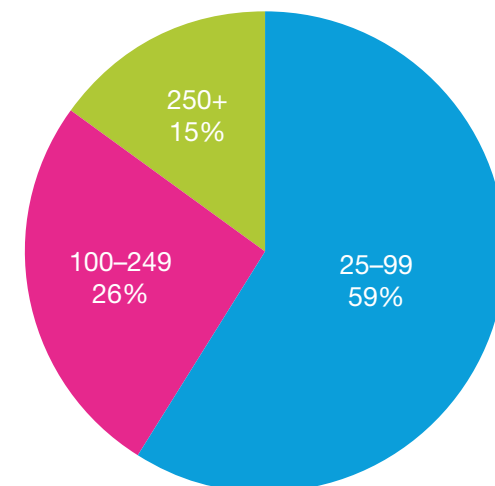
# of employees	Employee Size			
	Total	US	UK	AUS
50–249	19%	17%	20%	20%
250–499	21%	20%	23%	20%
500–999	26%	30%	21%	26%
1000–4999	19%	22%	17%	18%
5000+	15%	10%	19%	16%

# of stations	Contract Centre Size			
	Total	US	UK	AUS
25–99	59%	61%	61%	55%
100–249	26%	26%	24%	27%
250+	15%	13%	15%	18%

**Global Respondents:**  
Number of Employees



**Global Respondents:**  
Number of Contact Centre Stations



S3. How many people does your company employ at all locations? Your best estimate is fine.

S4. When your call centre(s) is/are fully-staffed, how many stations do you have across the company? Again, your best estimate is fine.

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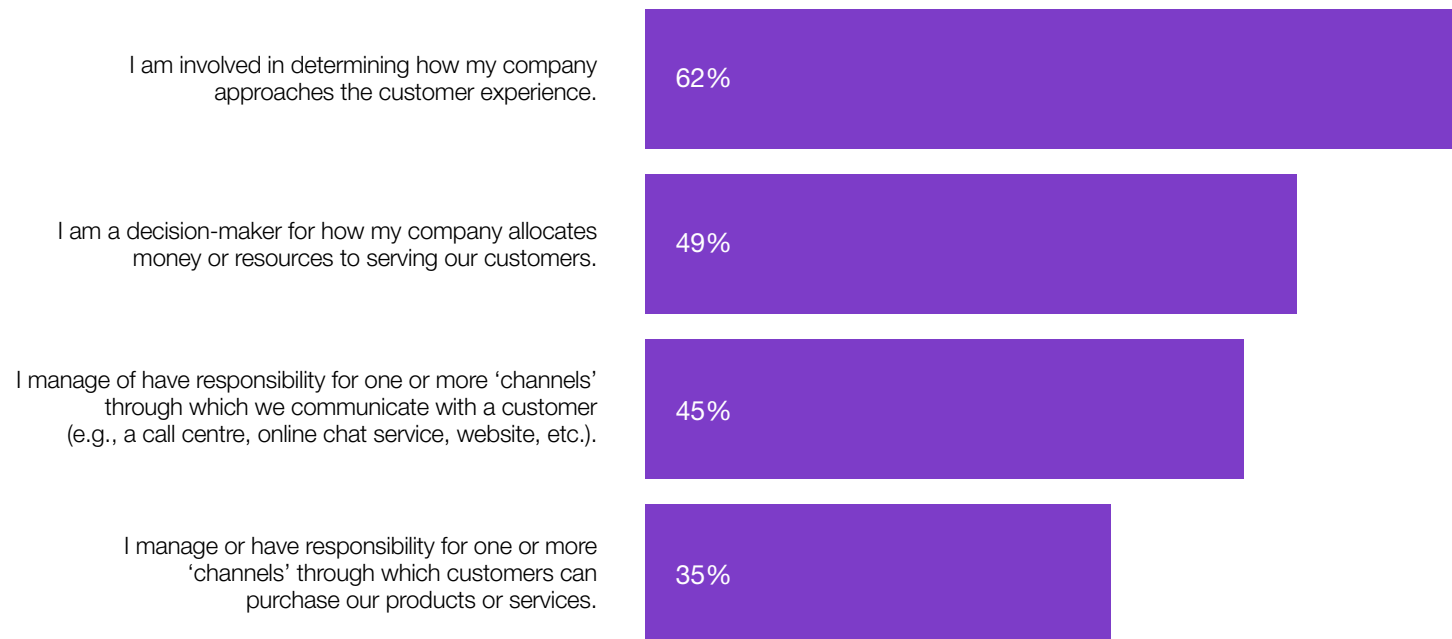
# Respondents involvement during purchase process

	Customer Service or Contact Centre Software				Customer Relationship Management (CRM) Software				Unified Communications Software				Digital Experience Software			
	Total	US	UK	AUS	Total	US	UK	AUS	Total	US	UK	AUS	Total	US	UK	AUS
Determining the business need	<b>69%</b>	74%	64%	68%	<b>57%</b>	62%	53%	55%	<b>53%</b>	58%	49%	52%	<b>58%</b>	63%	55%	55%
Evaluating the product or service	<b>64%</b>	67%	63%	61%	<b>58%</b>	60%	55%	59%	<b>52%</b>	62%	50%	46%	<b>60%</b>	66%	59%	56%
Recommending or selecting the product or service	<b>60%</b>	65%	59%	55%	<b>57%</b>	65%	52%	53%	<b>49%</b>	55%	46%	47%	<b>55%</b>	60%	53%	53%
Authorising or approving the product or service	<b>55%</b>	57%	52%	55%	<b>50%</b>	56%	48%	47%	<b>47%</b>	50%	43%	48%	<b>54%</b>	56%	54%	51%
Determining business or technical requirements	<b>52%</b>	55%	53%	49%	<b>60%</b>	68%	57%	56%	<b>45%</b>	50%	45%	40%	<b>59%</b>	62%	57%	58%

S2. For each of the software categories below, please indicate your level of involvement during the purchase process. Please select as many responsibilities as needed in each column:

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# Day-to-day responsibilities



S1. Thinking about how your company services or communicates with its customers, which of the following are part of your day-to-day responsibilities? Please select all that apply.

## Why **NICE** inContact ?

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

### More Resources

2019 Customer Experience (CX) Transformation Benchmark, Global Findings: Business vs. Consumer [Ebook](#)

2018 Customer Experience (CX) Transformation Benchmark, Global Consumers [Ebook](#)

An Operations Leaders Guide to Contact Centre Solutions [White Paper](#)

Powerful Enablers of Omnichannel Customer Loyalty [Ebook](#)

Faster Service, Happier Customers: Using Self-service to Accelerate the Speed of Resolution [White Paper](#)

Total Economic Impact of NICE inContact CXone [Research](#)

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