How Language and Demographic Factors Impact Customer Preferences for Care & Support may Impact Strategies for Customer Experience (CX) and Business Continuity Planning (BCP)

Preface

As providers of customer care and technical support services ourselves, we wanted to understand if customer care preferences (for both pre and post sales), differ amongst people from different countries or age groups. Then explore how variances might impact management strategies for customer experience, especially for businesses operating across multiple countries.

For instance, we wanted to know if attitudes

- vary between people of different age groups, from different countries with different mother tongues. Or depending on the type of transaction.
- learn if attitudes are consistent across groups, eg, for human as opposed to digital forms of customer support.

As we first explored these matters, the Covid19 pandemic raged, impacting both CX and BCP.

This prompted us to also consider how CX and BCP strategies overlap and impact each other ***(*1).*** For example, how social distancing or closure of facilities supported a drive to remote and home working and to automation in support of service continuity. But could over-reliance on these be counter-productive for CX and innovation once the crisis was over?

Even at this early stage, it seemed companies needed a nuanced strategy with a flexible set of capabilities and deployment options to cope with both normal operations and times of stress.

And now we do indeed see greater use of homeworking and flexible work practices (especially out of normal office hours), more physical separation of teams, greater emphasis on disaster recovery capability, and greater use of automation and Artificial Intelligence (AI) for digitally delivered care and in support of human delivered care services.

But how do Companies know if they're maximising opportunities presented by great customer experiences?

Most business or organisations seek to drive up customer experience (CX), net promoter scores (NPS), customer loyalty and retention across all operations, wherever customers are located. And of course to do so with an eye on cost. "More for Less" may be a typical CFO demand.

But the recent pandemic and frequent other emergencies highlight the need to also prioritise business continuity and elevate demand for flexible work practices, including Work from Home.

A challenge therefore is to devise a Customer Care strategy that maximises CX for all customers through both normal times and period of stress, as well as preparing the business for change, (including unexpected growth), whilst always controlling costs.

Leo Ariyanayakam, CEO Scicom MSC Bhd

**1. "What Price Business Continuity and Risk Mitigation" is a study of how inhouse and BPO operators of Customer facing care services can reduce risk, achieve higher levels of business continuity and operational flexibility, whilst still achieving and improving upon KPI's for day to day CX operations – without blowing budgets.*

The Premise Behind our Study of Customer Care Preferences

If people with different cultural, linguistic or socio-economic backgrounds have differing preferences for customer care in different types of situation, it follows that the provision of care services shouldn't simply follow a one size fits all approach. Simplistically, this could indicate that whilst automated care, chatbots or other digital forms of help work great in some situations, in others 1:1 face or talk time still provides most value.

This raises the questions "what works best and where?". To our surprise however we found little research had been conducted in this area. So we decided to do the research/

And here it is, perhaps the first large scale study of how end-customers prefer to receive and respond to customer care services and support in different circumstances, as opposed to how manufacturers, retailers, service providers may want to give it.

The Survey Methodology

We initially surveyed 1,000 people of all ages from well over 40 countries, predominantly from Asian, Mid East and African backgrounds but also from Europe and North America. Whilst almost all vast had some competence in English, less than 10% were native English speakers.

Questions were positioned in five categories.

1. high-level instinct or preference when specifically seeking help or care, in terms of favouring person to person or automated/web based services

2. Although the focus of this Insight is on customer care, we asked about people's preferences when shopping or seeking help for different categories of product or service. We wanted to see the extent to which preferences varied according to transaction type.

3. personal experiences in the last year when using different forms of contact channel. We asked if and how frequently respondents had experienced any issues.

4. Next, we asked people to select and prioritise up to 3 channel types which they consider to be most effective when there was an urgent need for help

5. Finally, we asked respondents to rate the effectiveness of each of eight channel types for solving issues.

Eight channel categories were used throughout, ranging from face to face interactions, through people-based live phone and live agent chat, to Chatbots, FAQ, Ask the Community (or Crowd Sourcing), Email and Social Media.

A follow up (see Section 6) was conducted with approximately 300 people who did not have high proficiency in English, to investigate how this group feels (also considering their friends and family) about the general availability of care services in terms of language choices offered to them by product and service providers.

Specific call-out's and findings are documented throughout each section which follows and summarized in Appendix A.

Executive Summary of Findings

See Appendix A for a full summary

Despite explosive growth in "*e-commerce*" its clear that, when there is a choice, ***many people still prefer person to person interactions for more complex or problematic transactions for some products or services.*** Since this article focuses on Customer Experience (CX) of Care and Support services, we've focused on these types of interaction, both before and after a sale or purchase.

One Size Doesn't Fit All ...

Is a clear finding when it comes to CX strategy. Age and nationality (and by extension language and other socio-economic factors) are major considerations as there can be surprising and counter intuitive variances in preferences. For example, the youngest cohort (under 25 in this study) sometimes has a surprising amount in common with older generations.

Choice of Language

There is clear ***desire to use a customer's own first choice of language or dialect*** for care and service transactions, be that for person to person or via automated / digital channels. In fact many view companies ***more favorably if they can communicate in their own or first choice of language* or dialect *with native speakers***.

However, noting that if local language based services such as chatbots are of lesser quality than (say) an English based option, then in such automated support cases, high quality English may be more effective than a sub-standard local language option.

Considering the need for local "home" languages and trans-national languages such as English, then the consolidation of both human and automated care into expert, AI supported, multi-lingual centres still makes a lot of sense.

This is especially valuable when supplemented by the use of flexible work patterns and shifts for both office-based and centrally managed but remotely located home workers, some of whom could be part-timers covering short but intense peak periods. Various companies including Computec Engineering of Japan employ this approach, as does Scicom. Headquartered in KL, Malaysia, Scicom operates several physical centres but also has hundreds of centrally-managed, AI assisted agents working from their homes across Asia.

Digital and Automation

We found digital and automated forms of care and support are less well received where they have been deployed quickly and less completely (common), perhaps by vendors motivated by cost saving as opposed to for improving CX.

Having said this, ***intelligent*** automation and (increasingly) AI can be game changers where, for example, used to offload tasks from human agents at peak times, to enable hybrid people/digital interactions to simplify and reduce queues, or to assure Business Continuity (BCP).

Throughout, businesses need to be sensitive to customer preferences when considering how Automated help is deployed. For example ***some nationalities are much more open to Digital services vs Person to Person (P2P) - and vice versa.*** This paper covers such preferences.

We noted some use of RPA (Robotic Process Automation) tools to help automate care processes, but these will replaced by AI.

Nuanced Strategy

The array of challenges in providing sustainable, affordable, scalable, quality, 24x7 care to all customers is challenging. **It follows that all-embracing customer care is best powered by a strategy based on deep understanding of customer preferences in each market served.**

This survey suggests companies need a **nuanced strategy which drives better CX but is also**

resilient, adaptable and scalable to cope with changing conditions at both global, regional and country level, be that due to disaster or unexpected growth.

Single vs Multi Centre?

Both are options. Multi-national operations can be delivered from each country or consolidated into a single country (such as Malaysia) with a good cost base, tolerance of flexible work practices and with visa friendly access to multi-lingual talent. **This approach can then be augmented by use of centrally managed agents working remotely from home in their own country,** a trend we noted becoming more common with some BPO's.

Results and Analysis in Detail

Section 1: High-level instincts and preferences when seeking help or customer care

"Imagine you are a customer and have a question or problem. You contact a supplier or serprovider for help. Is your first communications preference...."

Stated First Choice	All	Age Less than 25	Age 25-35	Age 36-45	Over 45
Speak or Chat with a real person or contact centre agent	83.8	81.6	83.1	88.4	90.3
Use an automated help facility (eg chatbot, FAQ or other	11.2	12.1	12.0	7.4	6.4
No preference	5.0	6.3	4.9	4.2	3.3

The overwhelming response to this question showed a primary preference for interacting with people when there is an issue that requires help or problem solving.   Perhaps not surprisingly, such preference was highest amongst older people.

We then looked at how people from different countries preferred to receive help. Every country and age group represented had a preference for "Person-to-Person" (P2P) care where available.

However a diverse group of countries ranging from Japan, Bangladesh, Vietnam, to Italy, Nigeria and Zimbabwe stated overwhelming primary preference for P2P care, whereas others such as Sri Lanka (33%) and to a lesser extent Thailand, China and Malaysia were more accepting of automated forms of help.   (Refer to following sections or more detail on national preferences).

<u>Automated care</u>

A greater level of acceptance of automated help was shown by people who are not native English speakers.   Anecdotal evidence suggests that, when the care language is English but a caller is not fluent in it, the caller may find it easier to communicate in English in written form (as opposed to verbal).   This may indicate a need for businesses to support more languages beyond English or the Company's other main language) for human interactions but also for digital/automated.

<u>Conclusions</u>

1. Where available, person to person interactions remain the top preference, but businesses cannot assume all markets or customer segments are the same.   Where a business wishes to inject automated help, care should be taken in some countries when assigning proportions of agents to automated care functions.

2. Where a client has customers who speak many languages, the goal should be to serve them in their preferred language (whether spoken or written/textual or via digital help).

Section 2: Preferences when seeking "pre-sales" help when shopping for different products or services

*"When you have a choice, what are your 1st, 2nd and 3rd preferences for **help** when you buy …"*

*This question was repeated three time; for **help** buying clothes, an electronic consumer goods item or a travel related service". The choices were to **get help and buy** at a shop or mall, online from a general purpose e-commerce website, or from a specific retailers, manufacturer or travel service provider's website.*

We looked at relative preferences for P2P based interactions (including face-to-face and via phone or chat) versus automated or on-line. We focused on three types of transaction being clothing, personal consumer electronic goods and services (banking, telecoms, travel related etc).

Preference Type (1st choice)	Clothing	Electronic consumer goods	Services
P2P (incl face to face in a shop or office, or on-line over phone or chat)	73.7	77.9	24.0
On Line or Automated	25.7	21.0	73.4
Other	0.6	1.1	2.6

P2P is the most popular preference when exploring or buying more personal items like clothes or personal electronic products. Services seem much more acceptable through automated modes.
Age Based Preferences

Preferences by Age Groups		Clothing	Electronic consumer goods	Services
1st Choice is Person to Person	***Average***	***73.7%***	***77.9%***	***24.0%***
	Under 25	*72.0%*	*86.0%*	*29.1%*
	25-35	*71.5%*	*74.2%*	*22.0%*
	36-45	*81.8%*	*70.2%*	*20.4%*
	Over 45	*90.3%*	*90.3%*	*22.5%*
1st Choice is On Line	***Average***	***25.7%***	***21.0%***	***73.4%***
	Under 25	*27.5%*	*13.0%*	*69.4%*
	25-35	*28.0%*	*24.5%*	*74.4%*
	36-45	*18.1%*	*28.7%*	*78.2%*
	Over 45	*9.7%*	*9.7%*	*77.4%*

P2P is overwhelmingly preferred by over 45s (>90%). But even amongst Under-25's, P2P is preferred in the consumer products and services spaces.

Under-25's had more in common with the Over-45's in terms of P2P preference for consumer goods. We can speculate reasons such as a lack of familiarity (and thus desire for help) with these more expensive products amongst the young, whilst the older group simply prefers what they're used to. Nonetheless this finding reinforces a view that not all customers are the same.

On-Line Preferences

Amongst those who stated a 1st preference for "On-Line", we looked at the relative preference for general e-commerce platforms (that we speculated offer best choice and prices) vs dedicated manufacturer or retailer sites that we speculate may provide more better product information and support).

On-Line 1st Preferences	Clothing	Electronic consumer goods	Services
Benchmark	***25.70%***	***21.0%***	***73.4%***
On-line (general website)	*19.4%*	*10.4%*	*53.5%*
On-line (Specific retailer, manufacturer or service provider website)	*6.3%*	*10.7%*	*20.0%*

We found a preference for general purpose e-commerce websites as opposed to specific retailer, manufacturer or services e-commerce sites. Perhaps a "one stop shop" creates a familiarity, sense of choice and ease of use that currently trumps the dedicated sites.

Nationality based Preferences

The following is based on the same questions but examines results on a language (first preference) basis.

National First Preferences for Person to Person (P2P)	Clothing	Electronic consumer goods	Services
Benchmark	**73.7%**	**77.9%**	**24.0%**
Japan	*100.0%*	*100.0%*	*33.0%*
Italy	*100.0%*	*67.0%*	*0.0%*
Sri Lanka	*86.6%*	*86.6%*	*33.8%*
Vietnam	*85.0%*	*85.7%*	*0.0%*
Indonesia	*82.0%*	*76.5%*	*11.8%*
India	*75.0%*	*65.0%*	*15.0%*
Malaysia	*74.8%*	*83.1%*	*24.5%*
Philippines	*74.0%*	*74.4%*	*21.4%*
PRC China	*71.2%*	*71.4%*	*26.2%*
Thailand	*65.7%*	*59.0%*	*33.1%*
Zimbabwe	*63.3%*	*54.5%*	*0.0%*
Nigeria	*55.5%*	*55.5%*	*44.0%*

Others with small samples sizes generally had very strong preference (90%+) for P2P for clothing and electronic goods and 0-10% for Services

In the above chart, the basic message is that higher scores indicate a greater acceptance of P2P interactions, whilst lower scores tend to indicate greater preference for or acceptance of on-line based help.

We have noted that P2P based help is still generally preferred in the product space but that on-line help is more preferred in the services area. But there are considerable differences between countries with some being much more P2P oriented (eg Japan) and several others being more ambivalent (eg Thailand and African countries). But there are also differences in attitude to P2P vs On-line help within countries. For example, whilst Vietnam and Indonesia had relatively higher preferences for P2P interactions in the product space, they had much lower relative preferences for P2P in the services space. Does this simply indicate a greater acceptance of technology based help in the services space (services by definition being less “touchie-feelie” than products), or does it denote a possible trust issue when dealing with people in the services space. Care needs to be taken when allocating people vs on-line help resources in these cases.

Conclusions

1) Overall, results support the view that person to person remains the top preference where such available, but businesses can’t assume all client segments or markets are the same.

2) Automated help is more accepted for certain services but rather less popular for other products or in some countries.

3) Care needs to be taken with services aimed at different generations of customers. The youngest can sometimes have more in common with the eldest.

4) There is divergence between country level preferences that would suggest some be offered more P2P services whilst others tolerate a higher proportion of automated or self services.

Section 3: Recent personal experiences when using different channel types.

Many customer attitudes to Support are based on prior experiences so we also asked

"In the last year, when you called or chatted with a contact centre, or with a chatbot, website help service etc, did you experience any issues" (such as those shown in tables below).

This question was repeated three times. Once each for calls to a contact centre agent, chats with a live contact centre agent, or chatting with a chatbot. "Issues" could be any of those associated with each type of channel session

At this time, fewer people have had experience of robotic *chatbots* as opposed to call centre phone or live chat sessions.

	Live Agent Phone	Live Agent Chat	Chatbot
Never Used (% of total surveyed)	10.0	11.1	20.3
Of those who have used each type of channel, have they experienced…	**unavailable, no answer, dropped call, poor quality, IVR mis-routing**	**no response, long wait, delays in mid chat, dropped sessions**	**slow, system inability to understand question or irrelevant**
No problems	28.5	32.8	34.4
Had Problems	71.5	67.2	65.6
with issues had < 10% occurrence	45.25%	42.92%	32.09%
with issues had > 10% occurrence	26.25%	24.32%	33.51%

<u>Conclusions</u>

Its striking that so many people have had negative experiences. We therefore explored this further and our other findings inform the following conclusions.

1. <u>Voice Calls</u>

    - Whilst these should and do often work well, Telco oriented issues include long post-dial delay, dropped calls, poor call quality or in IVR's, due to clipped or inaudible recordings or to incorrect call steering (usually after an untested script change)
    - These issues could be addressed if Care managers or Telco operators had better real-time visibility *from a customer experience perspective* as well from a technical perspective, but it appears few have such insight despite solutions being available. Managers may therefore be unaware if voice quality is negatively impacting CX.
    - Dropped or poor quality calls can occur anywhere. The most common causes are
        - Caller uses a mobile phone with poor coverage or in a noisy location, or use a low cost IDD or VoIP connection to initiate calls
        - When telco call routing is circuitous, or uses excessively compressed VoIP over long "last miles" to transport calls from call collection hubs into remote contact centres.

- Similarly when call centres field calls in an IVR in centre “A”, then forward calls requiring human assistance to distant centre “B” resulting in degraded quality
- Poorly managed IVR changes resulting in poorly recorded, inaudible or truncated messages or incorrect routing.

  - We also conducted a survey of voice quality (see *2).

2. <u>Live Chat</u>

   - Most common issues were long wait times to commence dialogue with an agent, or chat sessions being prematurely terminated by agents when a caller doesn’t immediately notice a chat has commence, and dropped sessions presumably due to network issues.
   - Chat sessions can be slower and take up more of the caller’s time than a quick phone call due to *back and forth* or iterative nature of a chat dialogue which often needs many more micro interactions to convey a point.
   - Feedback that, for someone who is less fluent (verbally) in the main language used by the centre’s voice service (say, English), it can be easier to describe an issue in writing. This highlights the need to offer both voice and chat in all the languages used by customers.

3. <u>Robot Chatbot</u>

   - The main objection is less technical per se and more frustration driven by inadequacy of the understanding, intelligence or capability of the chatbot. Many offer little more than a digital versions of a simple IVR and are not good for much beyond giving addresses, opening hours or serving simple pricing/balance enquiries etc.
   - Many chatbot’s seem to be confined to one or two languages.
   - Many chatbots make it hard (often deliberately) to transfer problem calls to a live agent.
   - But there is no doubting that smart chatbots backed by AI will shorten wait times, reduce costs and handle simpler client requests especially in times of crisis or stress.

**2. Robots placed in-country originating calls to advertised numbers in dozens of locations worldwide, to a variety of 3rd party contact centres located around Asia. These test calls simulated real customer calls and enabled objective assessment of caller experience from dial-tone to call quality to IVR. Results showed that, depending on a centre’s tolerance level of a poor call, more than 50% of all calls, domestic and international, can occasionally suffer issues which impact CX. At worst, numbers or services become unavailable or unusable, or the peak number of concurrent calls maybe higher than planned, or other issues can arise both in the network or within the centre’s IT environment. Such issues need to be identified and fixed rapidly but may not be if a Telco or Care operator doesn’t have full visibility of issues that impact CX.*

Section 4: Preferences for selecting a communication channel when there is an immediate need to seek help or solve a problem

The exact question asked was "*When an issue is urgent, and assuming you have a choice, which of the following are MOST EFFECTIVE to get help quickly and efficiently. Select 1st, 2nd and 3rd choices*".

	Most Effective	2nd Most Effective	3rd Most Effective
Person to Person choices	**86.6%**	**81.3%**	**65.0%**
Go back to the shop and talk face to face	36.7%		
TALK to Contact Centre agent	39.0%		
CHAT with Contact Centre agent	11.0%		
Automated digital choices	**13.4%**	**18.7%**	**35.0%**
Use CHATBOT on supplier website	2.4%		
FAQ on supplier website	5.7%		
Use "Ask the Community" on supplier website	2.3%		
Send an email to supplier	1.6%		
Post complaint or question on social media	1.4%		
No 2nd preference given	n/a	3.1	n/a
no 3rd preference given	n/a	n/a	4.3

When a need is urgent, there is still a huge preference for P2P interactions with emphasis on face-to-face or over-the-phone to a call centre agent. FAQ generally does better out of the on-line or digital options. But based on this question alone, its hard to see how live-agent based channels can be significantly replaced by automated channels any time soon, if left to customers to decide.

Only when pressed for a 3rd choice did a 'digital' type of choice gather support (Email 11%).

Preferences by Age

1st Preferences by Age Group	All	Under 25	25-35	36-45	Over 45
Person to Person choices	**86.6%**	**88.4%**	**85.2%**	**86.2%**	**93.5%**
Go back to the shop and talk face to face	36.7%	34.5%	37.5%	35.1%	**45.2%**
TALK to Contact Centre agent	39.0%	42.0%	36.1%	42.6%	41.9%
CHAT with Contact Centre agent	11.0%	11.6%	11.6%	8.5%	6.4%
Automated digital choices	**13.4%**	**11.6%**	**14.8%**	**13.8%**	**6.5%**
Use CHATBOT on supplier website	2.4%	1.0%	3.2%	2.1%	3.2%
FAQ on supplier website	5.7%	5.3%	6.7%	4.3%	zero
Use "Ask the Community" on supplier website	2.3%	1.9%	2.4%	3.2%	zero
Send an email to supplier	1.6%	1.9%	1.1%	3.2%	zero
Post complaint or question on social media	1.4%	1.4%	1.3%	1.1%	3.3%

Preference by Age Group	All	<25	25-35	36-45	>45
Person to Person help	86.6%	88.4%	85.2%	86.2%	93.5%
Automated help	13.4%	11.6%	14.8%	13.8%	6.5%

Fundamentally age doesn't seem to be factor for this question although the eldest cohort was the most conservative. What was striking was that the lowest perceived effectiveness for chatbots was the youngest (Under-25) group.

Preferences by Nationality

People from every country believe P2P is the most effective channel to solve real issues but people from Thailand, Indonesia and generally from Africa appear somewhat more confident in automated channels though none stood out strongly except perhaps for FAQ. This said its apparent that people from many other countries have an overwhelming confidence in P2P avenues.

Preferences for 1st Choices by Nationality	All	Japan	Italy	Sri Lanka	Vietnam	Indonesia	India	Malaysia	Philippines	PRC	Thailand	Pan Africa
Person to Person choices	86.6%	100%	100%	86.6%	100%	76.5%	90.0%	88.9%	82.1%	97.6%	66.7%	71.4%
Automated digital choices	13.4%	0%	0%	13.4%	0%	23.5%	10.0%	11.1%	17.9%	2.4%	33.3%	28.6%

Ist Preferences by Nationality	All	Japan	Italy	Vietnam	Thailand
Person to Person choices	86.6%	100%	100%	100%	66.7%
Automated digital choices	13.4%	0%	0%	0%	33.3%

Conclusions

1. When a need is urgent, and across all age groups, there is still a huge preference for P2P interactions. If left to customers, it seems that live-agent based channels will remain dominant for some time.

2. The lowest perceived effectiveness for chatbots was the youngest (Under-25) group.

3. Every country believes P2P is the most effective channel to solve real issues but some (particularly Thailand, Indonesia and Africa) have more confidence in automated channels. But in most, automated channels are not considered a viable go-to channel when a need is more urgent.

Section 5: Perceptions of the overall effectiveness of individual communications channels

"When you need help, what is your opinion of the effectiveness of XYZ".

The same eight channel categories were used as for previous questions. The objective was to find out how customers feel about the likely effectiveness of each type of interaction ranging from face to face through to automated channels. In all questions a rating of 1 is the perception of "least effective" and 5 is "most effective".

Category	**Perceived Effectiveness Rating : the % who rated each channel**						
	(least) 1	**2**	**3**	**4**	**(most) 5**	**Average Score**	**Most Common**
Going to Shop/Office SPEAK TO SOMEONE FACE TO FACE	3.40%	4.40%	25.6%	32.5%	34.0%	**3.89**	5
TALKING to a CONTACT CENTRE agent	1.1%	3.2%	26.6%	45.3%	23.8%	**3.87**	4
CHATTING with a live CONTACT CENTRE agent	3.0%	7.7%	36.1%	35.6%	17.6%	**3.57**	3
Posting on SOCIAL MEDIA	11.3%	16.3%	38.1%	23.4%	11.0%	**3.07**	3
Using E-MAIL	16.8%	14.7%	34.0%	20.2%	14.2%	**3.00**	3
Communicating with FAQ	10.1%	19.7%	43.3%	17.8%	9.1%	**2.96**	3
Using services such as ASK THE COMMUNITY	12.8%	20.7%	40.3%	17.6%	8.6%	**2.89**	3
COMMUNICATING with a CHATBOT ROBOT	22.8%	23.4%	34.7%	12.9%	5.9%	**2.55**	3

Conclusions

- P2P interactions are widely perceived as superior to other forms by most people regardless of age or ethnicity with actual speech rated higher than written chat.
- Less than 10% of respondents ranked P2P interactions as negative or ineffective (ratings 1/2 in the survey), whereas other forms of help had negative ratings 3 times as high at 27-46%.
- Traditional media such as Email and FAQ scored similarly to more recent channels such as Social Media.
- The least effective channel by far is chatbots which might say more about the way many have been executed, than about the technology per se. (Anecdotal evidence highlights limited intelligence and functionality, aggravated by limited language choices and the difficulty in some cases of "escalating" beyond the chatbot to a real person).

Examination of Each Individual Communications Type

In the following sections we look at detailed perceptions for each of the eight channel types including by age and nationality. In the tables, figures in **green** indicates a significantly better average opinion or greater tolerance of that channel type. A figure in **red** signals an opinion that is significantly below average.

- **Going to a Shop/Office to SPEAK TO SOMEONE FACE TO FACE**

Going to Shop/Office SPEAK TO SOMEONE FACE TO FACE		Perceived Effectiveness Rating : the % who rated the channel (least) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		3.40%	4.40%	25.6%	32.5%	34.0%	**3.89**	5
By Age	**less 25**						3.87	4
	25-35						3.86	4-5
	36-45						**4.04**	5
	over 45						3.93	4-5
By Nationality	**Japan**						**4.3**	5
	Sri Lanka						**4.2**	5
	Vietnam						3.9	5
	Indonesia						3.9	4-5
	India						3.9	3
	Malaysia						3.9	5
	Philippines						**4.1**	4
	PRC China						**3.4**	3
	Thailand						**3.6**	3-4
	Pan Africa						**4.0**	5
	Pan Euro						**4.0**	4

No demographics or countries have a poor opinion but Thailand and PRC expressed less enthusiasm than others whilst Japan, Sri Lanka, Philippines and to some extent Africa and European nations were most enthusiastic about face to face interactions.

- **TALKING to a CONTACT CENTRE agent**

TALKING to a CONTACT CENTRE agent		Perceived Effectiveness Rating : the % who rated the channel (least) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		1.1%	3.2%	26.6%	**45.3%**	**23.8%**	**3.87**	4
By Age	**less 25**						3.9	4
	25-35						3.9	4
	36-45						4.0	4
	over 45						**3.6**	4
By Nationality	**Japan**						**4.3**	5
	Sri Lanka						**4.2**	5
	Vietnam						3.9	5
	Indonesia						3.9	4-5
	India						3.9	3
	Malaysia						3.9	5
	Philippines						**4.1**	4
	PRC China						**3.4**	3
	Thailand						**3.6**	3-4
	Pan Africa						**4.0**	5
	Pan Euro						3.9	3-4

Much the same as for face to face. Surprising perhaps that the Over-45's were more reserved about talking over the phone to an agent than live F2F talk time.

- **CHATTING to a CONTACT CENTRE agent**

CHATTING with a live CONTACT CENTRE agent		Perceived Effectiveness Rating : the % who rated the channel (east) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		3.0%	7.7%	36.1%	35.6%	17.6%	**3.57**	3
By Age	less 25						3.56	4
	25-35						3.61	3
	36-45						3.52	4
	over 45						**3.29**	4
By Nationality	Japan						**3.30**	3-4
	Sri Lanka						3.66	4
	Vietnam						**4.00**	4
	Indonesia						**3.94**	4
	India						**3.30**	4
	Malaysia						3.49	3
	Philippines						**3.82**	4
	PRC China						3.53	3
	Thailand						3.65	3
	Pan Africa						**3.82**	4
	Pan Euro						**3.90**	4

Another solid marking for Live Chat, albeit not as robust as for speech. The Over-45 group, Japanese and Indian's showed least enthusiasm. Vietnam and Indonesia joined Philippines, Africa and Europe as showing above average.

- **COMMUNICATING with a CHATBOT**

COMMUNICATING with a CHATBOT ROBOT		Perceived Effectiveness Rating : the % who rated the channel (least) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		22.8%	23.4%	34.7%	12.9%	5.9%	**2.55**	3
By Age	less 25						2.60	3
	25-35						2.61	3
	36-45						**2.38**	3
	over 45						**2.10**	**2**
By Nationality	Japan						**2.33**	3
	Sri Lanka						**2.43**	3
	Vietnam						**2.29**	**2**
	Indonesia						**2.43**	3
	India						2.50	3
	Malaysia						2.52	3
	Philippines						**2.89**	3
	PRC China						**2.38**	2-3
	Thailand						**3.29**	3
	Pan Africa						**2.41**	**1**
	Pan Euro						**2.25**	**2**

Chatbots lag far behind other channels in recognition of effectiveness. Only Thailand showed any real respect for Chatbots.

- **Communicating with FAQ**

Communicating with FAQ		Perceived Effectiveness Rating : the % who rated the channel (least) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		10.1%	19.7%	43.3%	17.8%	9.1%	**2.96**	3
By Age	**less 25**						2.93	3
	25-35						3.08	3
	36-45						**2.69**	3
	over 45						**2.51**	**2**
By Nationality	**Japan**						**2.67**	3
	Sri Lanka						2.87	3
	Vietnam						**2.29**	2
	Indonesia						2.88	3
	India						**3.74**	3
	Malaysia						2.84	3
	Philippines						**3.43**	3-4
	PRC China						2.88	3
	Thailand						**3.59**	3
	Pan Africa						3.08	**1**
	Pan Euro						2.94	**2**

The FAQ rating suggests it is generally accepted for the limited scope for which it is intended. Notable however once again was that Over-35's, Japanese, Vietnamese had less respect, whilst India, Philippines and Thailand had most positive view of FAQ.

- **Using services such as ASK THE COMMUNITY (including 'crowd-sourcing')**

Using services such as ASK THE COMMUNITY		Perceived Effectiveness Rating : the % who rated the channel 1 (least)	2	3	4	5 (most)	Average Score	Most Common
All Surveyed		12.8%	20.7%	40.3%	17.6%	8.6%	**2.89**	3
By Age	**less 25**						2.72	3
	25-35						2.78	3
	36-45						2.74	3
	over 45						**2.42**	3
By Nationality	**Japan**						**2.00**	2
	Sri Lanka						2.80	3
	Vietnam						3.00	2
	Indonesia						2.82	3-4
	India						**3.10**	3
	Malaysia						2.78	3
	Philippines						**3.44**	3
	PRC China						2.95	3
	Thailand						**3.66**	4
	Pan Africa						**3.20**	3
	Pan Euro						**2.50**	shared

Japanese, Over-45 and European respondents had somewhat negative views. Thailand again had the most positive view of an automated channel, with Philippines, India and Africa.

- **Using E-MAIL**

Using E-MAIL		Perceived Effectiveness Rating : the % who rated the channel (least) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		16.8%	14.7%	34.0%	20.2%	14.2%	**3.00**	3
By Age	**less 25**						**2.83**	3
	25-35						3.13	3
	36-45						2.94	3
	over 45						**2.78**	**2**
By Nationality	**Japan**						**1.67**	**1**
	Sri Lanka						3.07	3
	Vietnam						**2.57**	3
	Indonesia						3.00	3
	India						**3.35**	3
	Malaysia						**2.86**	3
	Philippines						3.15	3
	PRC China						3.07	3
	Thailand						**3.74**	**4**
	Pan Africa						**3.64**	3-4
	Pan Euro						**3.37**	**4**

It seems Email has a niche when other more channels fail to convey detail or a matter need more consideration. The strongest support came from countries which showed general support for digital solutions (Thailand, India) plus Africa and Europe.

Only Japan showed a strong negative result. As in some earlier questions, Under-25's had more in common with Over-45's.

- **Posting on SOCIAL MEDIA**

Posting on SOCIAL MEDIA		Perceived Effectiveness Rating : the % who rated the channel (least) 1	2	3	4	(most) 5	Average Score	Most Common
All Surveyed		11.3%	16.3%	38.1%	23.4%	11.0%	**3.07**	3
By Age	**less 25**						3.07	3
	25-35						3.17	3
	36-45						3.02	3
	over 45						3.10	3
By Nationality	**Japan**						**2.67**	3
	Sri Lanka						**3.53**	4
	Vietnam						3.00	3
	Indonesia						3.12	4
	India						2.95	3-4
	Malaysia						2.95	3
	Philippines						**3.22**	3
	PRC China						2.92	3
	Thailand						**3.68**	3
	Pan Africa						**3.58**	3
	Pan Euro						**3.62**	4

Social Media did not attract negative views (except to an extent, Japan) but it was rated strongly in countries which generally seem happier with automated help, including Thailand, Sri Lanka, Philippines, Africa and Europe.

<u>Conclusions Summary</u>

Consistently we see

- Thailand has a greater acceptance or confidence in the effectiveness of automated or on-line channels than other countries.
- Philippines rates every channel higher than the average (benchmark).
- Sri Lanka has above average perception of P2P interactions and generally below average perceptions of on-line.
- Malaysia ranked every media type at or below the average (but always close to the benchmark score).
- Japan appears the most conservative and holds strongest opinions in favour of P2P interactions.
- Vietnam generally has a more negative view of on-line interactions compared to P2P.

- Generally, every demographic has a positive view of P2P channels. P2P channels also have the least negative views. Less than 10% of respondents ranked P2P interactions as negative or ineffective, whereas other forms of help had negative ratings 3 times as high - ranging from at 27-46%.
- Almost every country has negative or at best neutral perceptions of chatbots except Thailand
- China had the lowest perception of the effectiveness of speaking face to face or over the phone to live agents

- With the exception of speaking face to face and using social media, Over-45's are more negative about other media channels than younger age groups.

Section 6: Supplementary Questions re Language

A subset of respondents were asked additional questions about attitudes to product and service providers when customer services is or it not provided in the customer's own language.

In general how important is it that a provider of a product or service offers help and support in the customer's own preferred language	**Extremely Important**	**Preferable but not essential**	**Not important or essential or Don't know**
	83%	15%	2%
If a provider pf products or services does NOT offer help and support (through P2P or other forms of channel) in YOUR own preferred language...	**I am unlikely to do business with this provider**	**I will be less likely to do business with this provider**	**No difference**
For routine enquiries	**48%**	**39%**	**13%**
For urgent help or more serious matters	**79%**	**16%**	**5%**
(All numbers rounded to nearest %)			

Conclusions Summary

Understandably most clients want to be able to get help or transact using their own or other language in this they have high competence.

For more serious matters, this translates into a significant resistance to do business with companies who do not offer help in the customers preferred language.

It follows that its not sufficient to only provide care and support in English, Chinese Mandarin or other major languages (or dialects), be that through person to person or digital/automated help.

Appendix A: Summary of Findings

1. Companies need a nuanced strategy with a flexible set of capabilities and deployment options, designed to cope with both normal operations and times of stress. Thus, in future we may expect to see greater use of home-working in Asia, more physical separation of teams, a greater emphasis on disaster recovery (DR) capabilities (at network, IT, equipment, applications and data level, as well as operational facilities and work space) and of automation/AI, with proportions being adjustable according to need.

2. Where a client has customers who speak many languages, the goal should be to serve them in their preferred language (whether spoken, written/textual or automated).

3. If left to customers, live agent-based channels will remain dominant for some time. P2P interactions are widely perceived as superior to other forms by most people regardless of age or ethnicity with actual speech rated higher than written chat.

4. P2P channels have the least negative views. Less than 10% of respondents ranked P2P interactions as negative or ineffective (ratings 1/2 in the survey), whereas other forms of help had negative ratings 3 times as high at 27-46%.

5. Traditional media such as Email and FAQ scored similarly to more recent channels such as Social Media.

National & Age Related Observations

6. Care needs to be taken with services aimed at different generations of customers. Older generations tend to me more people oriented and conservative to new technology, but as with chatbots, in some cases under 25 customers may also be conservative. With the exception of speaking face to face and using social media, Over-45's are more negative about other media channels than younger age groups.

7. Overall, P2P interactions are considered most effective across all countries and age groups, but businesses cannot assume all markets or customer segments are the same. Some (particularly Thailand, Indonesia and Africa) have more confidence in automated channels.

8. Thailand has a greater acceptance or confidence in the effectiveness of automated or on-line channels than other countries. Thailand has the highest rating for chatbots.

9. Philippines rates every channel higher than the average (benchmark).

10. Sri Lanka has above average perception of P2P interactions and generally below average perceptions of on-line.

11. Malaysia ranked every media type at or below the average (but always close to the benchmark)

12. Japan appears most conservative and holds strongest opinions in favour of P2P interactions.

13. Generally, Vietnam has a more negative view of on-line interactions compared to P2P.

14. China has the lowest perception of the effectiveness of speaking face to face or over the phone to live agents

Automated Care

15. In most countries or age groups, automated channels are not considered a viable go-to channel when a need is more urgent.

16. Almost every country has a negative or at best neutral perception of chatbots except Thailand

17. Customers consider chatbots to be far the least effective channel. This might say more about the way many have been executed, than about chatbots per se. (Anecdotal evidence highlights limited intelligence and functionality, aggravated by limited language choices and the difficulty in some cases of "escalating" beyond the chatbot to a real person).

18. Automated services are a great way of helping handle easier enquiries or expanding speed of first response at time of stress (eg, peak volume or staff shortage), but more care should be taken in some countries (such as Japan) or with older demographic customers when assigning or re-assigning tasks from Human agents to Digital services. See various tables for details.

19. Automated help is more accepted for use when buying or supporting some services and rather less popular for other products, or in some countries. See tables for details.

20. The lowest perceived effectiveness for chatbots was amongst the under 25's

21. There is divergence between country level preferences. Some (eg Thailand, China) can tolerate a higher proportion of automated or self services, whilst in others (eg Japan, Philippines, Vietnam and parts of Africa) it may be best to offer greater access to P2P services.

22. Call diversion on request from automated to agent based should be made relatively easy

23. Offering support in the customers own or preferred language is as or more important in digital / automated help transactions (including human chat based) as in person to person voice.

Summary of Channel Observations

24. <u>P2P Voice Calls</u>

    i. Common issues are long post-dial delay, dropped calls, poor call quality, or in IVR's due to clipped or inaudible recordings, or to incorrect call steering.

    ii. Many issues could be addressed if managers had visibility, but it appears few have insight of voice network performance from a customer perspective before calls reach an agent. Managers may be unaware of the extent of issues that impact CX.

    iii. Dropped or poor quality calls can occur anywhere. The most common causes are

       - Caller uses a mobile phone, low cost IDD or VoIP connection to initiate calls
       - a telco route for inbound or outbound calls is circuitous, or uses unoptimised VoIP over long "last miles" into the actual contact centre

    - call centre IVR "A" answers then forwards to offshore centre "B", perhaps using *non-voice-optimised* VOIP, resulting in degraded quality

       - Poorly managed IVR changes resulting in poorly recorded, inaudible or truncated messages or incorrect routing.

iv. The author has also conducted a survey of voice quality (see *2). A key finding is that voice call issues could be reduced with regular precautionary testing.

25. P2P Live Chat

i. Most common issues are long wait times to commence dialogue with an agent, or chat sessions being prematurely terminated by agents when a caller doesn't immediately notice a chat has commence, and dropped sessions presumably due to network issues.

ii. Chat sessions can be slower and take up more of the caller's time than a quick phone call due to *back and forth* or iterative nature of a chat dialogue which often needs many more micro interactions to convey a point.

iii. Feedback that, for someone who is less fluent (verbally) in the main language used by the centre's voice service (say, English), it can be easier to describe an issue in writing. This highlights the need to offer both voice and chat in all the languages used by customers.

26. Robot Chatbots

i. The main objection is less technical per se and more frustration driven by inadequacy of the understanding, intelligence or capability of the chatbot. Many offer little more than a digital versions of a simple IVR and are not good for much beyond giving addresses, opening hours or serving simple pricing/balance enquiries etc.

ii. Many chatbot's seem to be confined to one or two languages.

iii. Many chatbots make it hard to transfer to a live agent. Feedback suggests one option for frustrated callers is to swear at the chatbot (in writing) to which the chatbot may recognise anger or frustration and proactively transfer the call to a live agent.

iv. But there is no doubting that smart chatbots backed by AI can shorten wait times, reduce costs and handle simpler client requests especially in times of crisis or stress.

END OF REPORT

About the author

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**2. Robots placed in-country originating calls to advertised numbers in dozens of locations worldwide, to a variety of 3rd party contact centres located around Asia. These test calls simulated real customer calls and enabled objective assessment of caller experience from dial-tone to call quality to IVR. Results showed that, depending on a centre's tolerance level of a poor call, 50% of all calls, domestic and international, can from time to time suffer issues which impact customer experience. At worst, numbers or services are unavailable or unusable, or the peak number of concurrent calls maybe lower than planned, or any of many other issues can arise both in the network and inside the centre's IT environment. Its apparent that regular precautionary testing could assist in supplier management and reduce the incidence of CX issues resulting from voice networking.*