GLOBAL STATE OF
MULTICHANNEL
CUSTOMER
SERVICE
REPORT

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Global State of Multichannel Customer Service Report

Microsoft

Introduction

As customer service and customer experience become key differentiators for brands and organizations across all industries around the world, it has never been more important to know as much as you can about their preferences and expectations for service and engagement.

Microsoft's Global State of Multichannel Customer Service Report shows that on average, consumers regularly use at least four different channels when interacting with a brand or organization for customer-related questions and issues. In addition to the growing number of channels being used, channel preference is also changing based on the customer's perceived value for time spent or channel convenience.

With more than half of the consumers surveyed saying that their customer service interaction now begins online, this report notes fast-growing expectations for mobile, social, and online self-service capabilities. More than 90 percent of consumers expect brands or organizations to have an online customer self-service offering, and 60 percent say they have a more favorable view of a brand if that self-service offering is mobile responsive. Think customers only engage on social media to complain about poor service? Media stories may make you think so, but you'll be surprised by the results of our survey.

The Global State of Multichannel Customer Service Report also takes a look at what consumers view as the most important aspects of a good customer experience, as well as the most frustrating aspects of a poor experience, which interestingly, vary by location, as do preferred customer service channels. One thing almost all global consumers agree on? The survey shows that 97 percent say that customer service is very important or somewhat important in their choice of, or loyalty to, a brand.

Service has never been more important and customer expectations are on the rise. As brands and organizations, it's time to set a baseline for the consistent delivery of satisfying service across channels (and around the globe), then work from there to become a leader on this increasingly competitive battlefield.

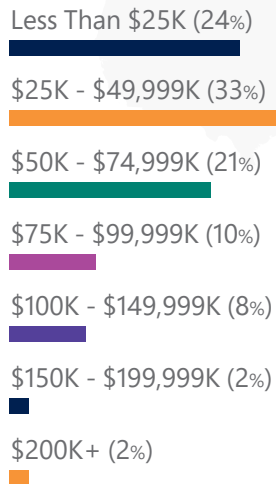To your success in customer service and engagement,

Bill Patterson
General Manager of Service Engagement, Microsoft
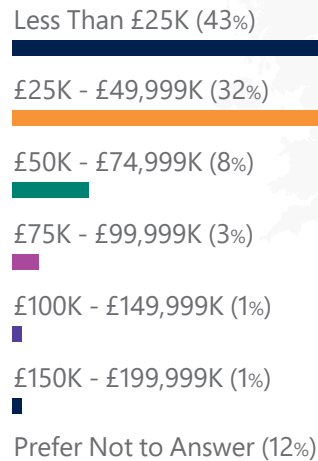
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Methodology

This Global State of Multichannel Customer Service Survey was conducted online using a third-party opt-in survey tool. Approximately 4,000 consumers (1,000 each from the United States, the United Kingdom, Brazil and Japan) ages 18 and older were surveyed, equally divided between male and female with varying average household incomes. The following represents the age and gender breakdown for the global survey, with annual income broken down by location:
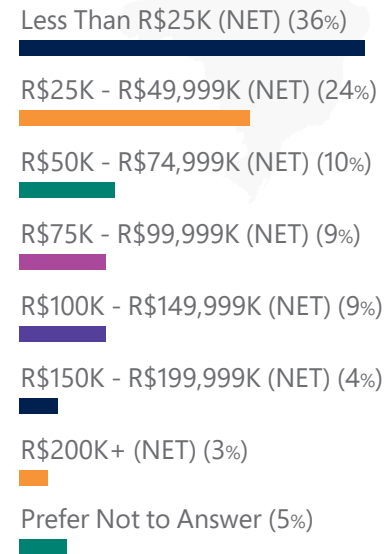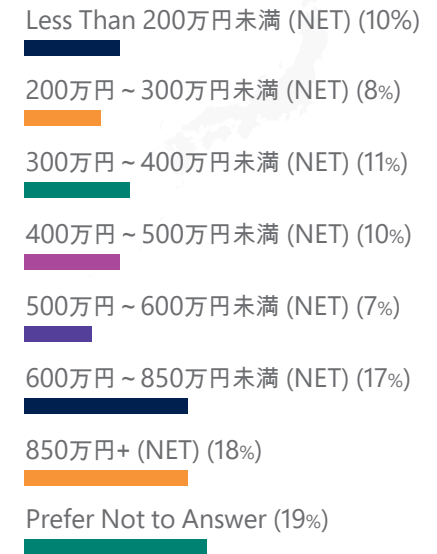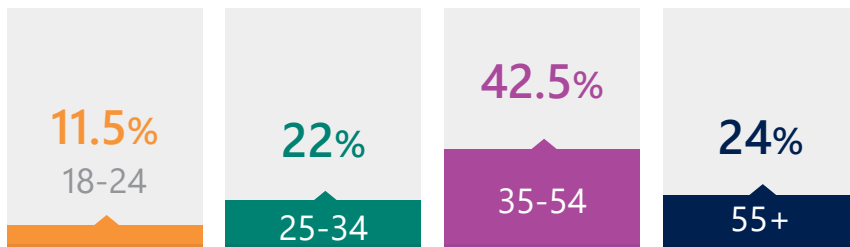
Household Income

United States	United Kingdom	Brazil	Japan
Less Than $25K (24%)	Less Than £25K (43%)	Less Than R$25K (NET) (36%)	Less Than 200万円未満 (NET) (10%)
$25K - $49,999K (33%)	£25K - £49,999K (32%)	R$25K - R$49,999K (NET) (24%)	200万円～300万円未満 (NET) (8%)
$50K - $74,999K (21%)	£50K - £74,999K (8%)	R$50K - R$74,999K (NET) (10%)	300万円～400万円未満 (NET) (11%)
$75K - $99,999K (10%)	£75K - £99,999K (3%)	R$75K - R$99,999K (NET) (9%)	400万円～500万円未満 (NET) (10%)
$100K - $149,999K (8%)	£100K - £149,999K (1%)	R$100K - R$149,999K (NET) (9%)	500万円～600万円未満 (NET) (7%)
$150K - $199,999K (2%)	£150K - £199,999K (1%)	R$150K - R$199,999K (NET) (4%)	600万円～850万円未満 (NET) (17%)
$200K+ (2%)	Prefer Not to Answer (12%)	R$200K+ (NET) (3%)	850万円+ (NET) (18%)
		Prefer Not to Answer (5%)	Prefer Not to Answer (19%)

Age

11.5% 18-24
22% 25-34
42.5% 35-54
24% 55+

Gender

Female **50%** | Male **50%**

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Changing Channels

The customer service channel survey responses show some major changes occurring in channel usage and preference. According to the State of Multichannel Customer Service Report, Japanese customers use an average of just two service channels regularly to interact with a brand or organization, while US and UK customers use an average of four, with customers in Brazil using an average of five. The five most popular channels are consistently email, telephone, live chat, search engine, and online self-service support portal/FAQs, sometimes not necessarily in that order, however, when compared by location.

Which of the following customer service channels do you use on a regular basis?

United States	**United Kingdom**	**Brazil**	**Japan**
Telephone (81%)	Telephone (72%)	Telephone (84%)	Telephone (67%)
Email (78%)	**Email (82%)**	**Email (87%)**	**Email (69%)**
Live Chat (64%)	Live Chat (58%)	Live Chat (70%)	Live Chat (4%)
Online Support Portal / FAQs (62%)	Online Support Portal / FAQs (56%)	Online Support Portal / FAQs (64%)	Online Support Portal / FAQs (50%)
Search Engine (51%)	Search Engine (46%)	Search Engine (49%)	Search Engine (38%)

When engaging with a brand or organization for customer service, where does your interaction typically begin?

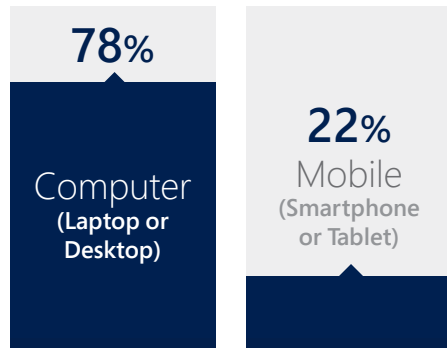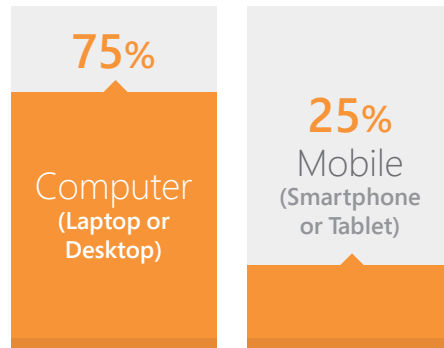| **United States**			**United Kingdom**			**Brazil**			**Japan**		
57% Online	35% On the Phone	8% In Person	64% Online	28% On the Phone	8% In Person	56% Online	41% On the Phone	2% In Person	56% Online	43% On the Phone	1% In Person

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Changing Channels

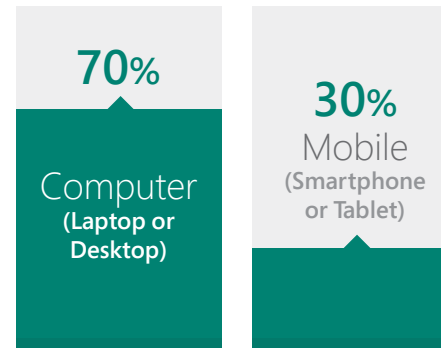**When beginning an online customer service interaction, which device do you use most?**
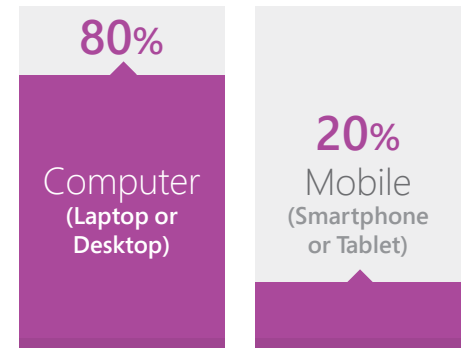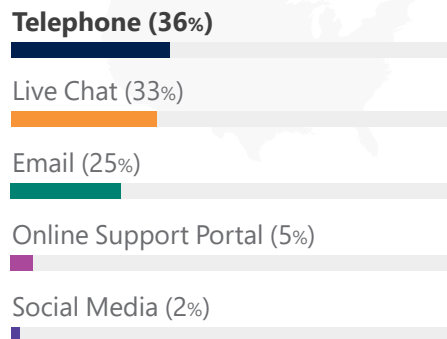
United States
- 78% Computer (Laptop or Desktop)
- 22% Mobile (Smartphone or Tablet)

United Kingdom
- 75% Computer (Laptop or Desktop)
- 25% Mobile (Smartphone or Tablet)

Brazil
- 70% Computer (Laptop or Desktop)
- 30% Mobile (Smartphone or Tablet)

Japan
- 80% Computer (Laptop or Desktop)
- 20% Mobile (Smartphone or Tablet)

When engaging with a brand or organization for assisted service, which channel do you prefer to use?

When it comes to assisted service preferences however, the more traditional channels still win out with the exception of live chat. This could be due in part to this channel's ability to provide prompt, personalized online assistance to complex questions, many times while the customer is doing something else or is pressed for time and does not have the ability to wait on hold or for an email response.
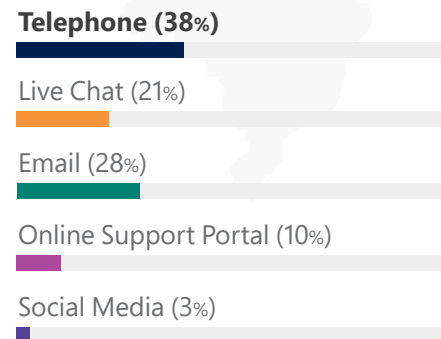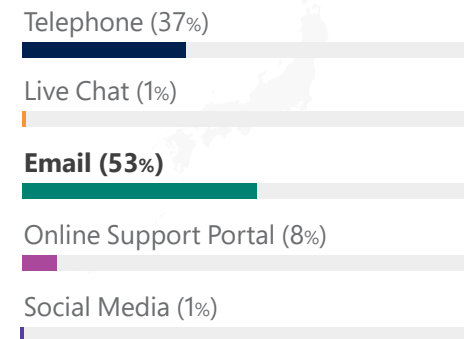
United States
- **Telephone (36%)**
- Live Chat (33%)
- Email (25%)
- Online Support Portal (5%)
- Social Media (2%)

United Kingdom
- Telephone (31%)
- Live Chat (29%)
- **Email (33%)**
- Online Support Portal (4%)
- Social Media (2%)

Brazil
- **Telephone (38%)**
- Live Chat (21%)
- Email (28%)
- Online Support Portal (10%)
- Social Media (3%)

Japan
- Telephone (37%)
- Live Chat (1%)
- **Email (53%)**
- Online Support Portal (8%)
- Social Media (1%)

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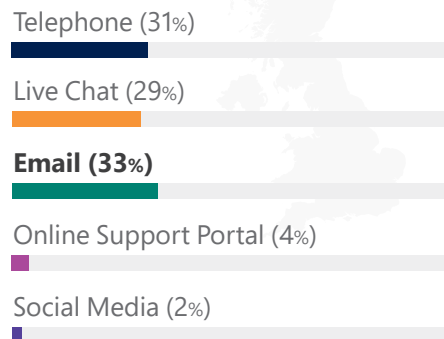
Hold the Phone

While customers may be quick to pick up the phone for assisted service, sometimes their patience in waiting on hold runs thin. For consumers in Brazil, Japan and the UK, more than half say one to five minutes is the maximum time they'll wait on hold.

When engaging with a brand or organization on the phone, how long are you willing to wait on hold?

Legend: ■ United States ■ United Kingdom ■ Brazil ■ Japan

1-5 Minutes
United States	United Kingdom	Brazil	Japan
43%	56%	58%	66%

5-10 Minutes
United States	United Kingdom	Brazil	Japan
39%	30%	32%	24%

10+ Minutes
United States	United Kingdom	Brazil	Japan
18%	14%	9%	9%

■ Microsoft
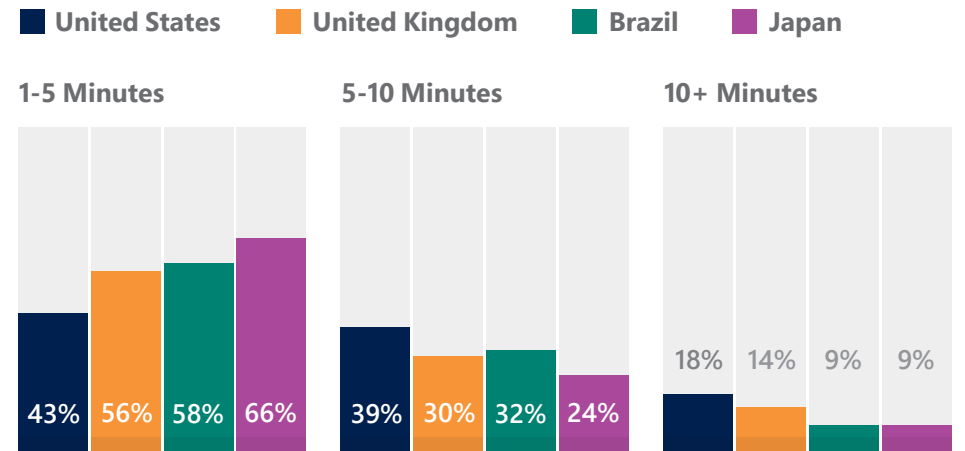
Ovations and Frustrations

What makes for a satisfying customer service experience? It's about time, say consumers across the globe. Getting their issue resolved quickly, or on first contact no matter how long it takes, are the two most important factors. Consumers' biggest service frustrations directly align with valuing a customer's time, but with interesting mixed results on what makes customers most upset depending on the location, as well as if they've stopped doing business with a brand due to a poor customer service experience.

What do you feel is the most important aspect of a satisfying customer service experience?

United States

Getting my issue resolved quickly (34%)

Getting my issue resolved on first contact (no matter how long it takes) (29%)

A friendly and knowledgeable customer service agent (27%)

Being able to find the information I need without assistance (10%)

United Kingdom

Getting my issue resolved quickly (42%)

Getting my issue resolved on first contact (no matter how long it takes) (26%)

A friendly and knowledgeable customer service agent (22%)

Being able to find the information I need without assistance (9%)

Brazil

Getting my issue resolved quickly (41%)

Getting my issue resolved on first contact (no matter how long it takes) (26%)

A friendly and knowledgeable customer service agent (16%)

Being able to find the information I need without assistance (16%)

Japan

Getting my issue resolved quickly (48%)

Getting my issue resolved on first contact (no matter how long it takes) (23%)

A friendly and knowledgeable customer service agent (15%)
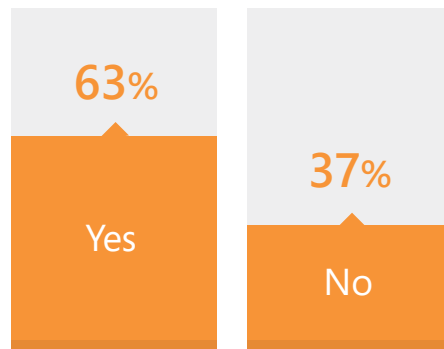
Being able to find the information I need without assistance (12%)

Have you ever stopped doing business with a brand due to a poor customer service experience?
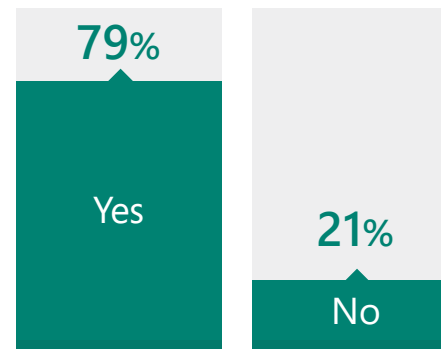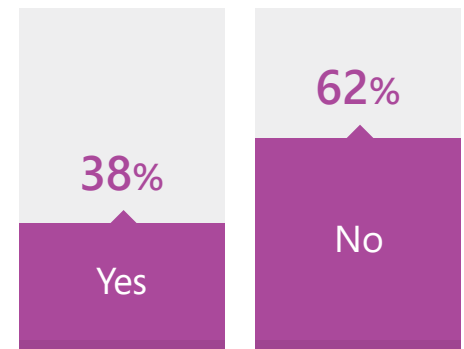
United States
68% Yes
32% No

United Kingdom
63% Yes
37% No

Brazil
79% Yes
21% No

Japan
38% Yes
62% No

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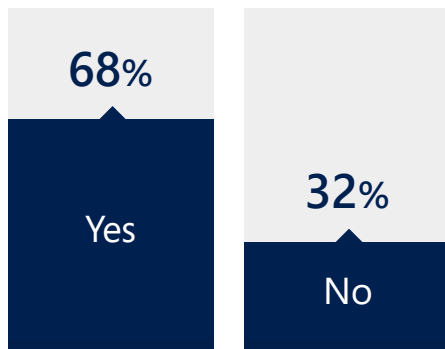
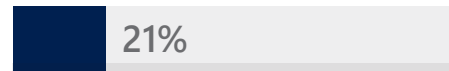# Ovations and Frustrations

What do you feel is the most frustrating aspect of a customer service experience?
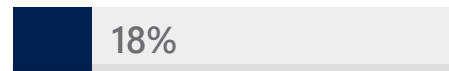
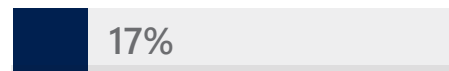## United States

Being passed between agents

22%

Having to contact a brand or organization multiple times for the same issue
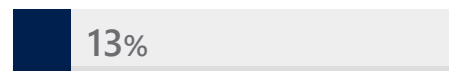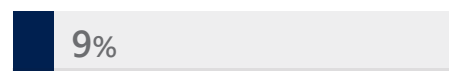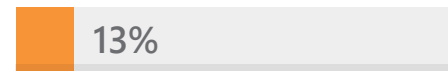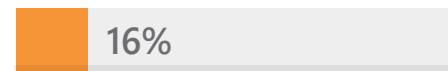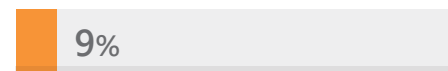
21%

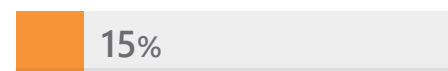IVR automation / not being able to reach a live person

18%

Not being able to resolve my issue or find info online

17%

Impolite customer service agent

13%

Being kept waiting on hold

9%

United Kingdom

Being passed between agents

23%

Having to contact a brand or organization multiple times for the same issue

23%

IVR automation / not being able to reach a live person

13%

Not being able to resolve my issue or find info online

16%

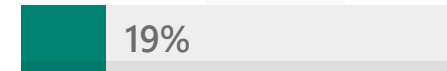Impolite customer service agent
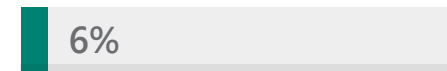
9%

Being kept waiting on hold

15%

Brazil

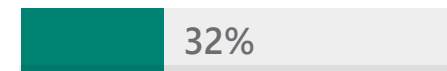Being passed between agents

19%

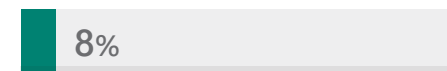Having to contact a brand or organization multiple times for the same issue

24%

IVR automation / not being able to reach a live person

6%

Not being able to resolve my issue or find info online

32%

Impolite customer service agent

8%

Being kept waiting on hold

13%

Japan

Being passed between agents

21%

Having to contact a brand or organization multiple times for the same issue
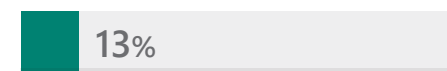
11%

IVR automation / not being able to reach a live person

12%

Not being able to resolve my issue or find info online
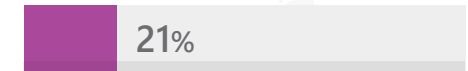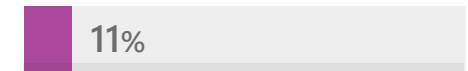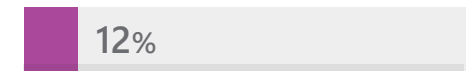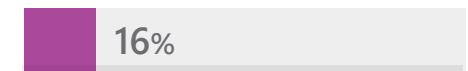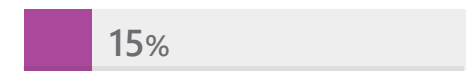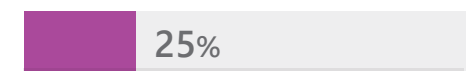
16%

Impolite customer service agent

15%

Being kept waiting on hold

25%

Microsoft

Driving Self-Service Convenience

As shown previously in the customer service frustrations overview, being able to find a resolution to an issue or answers and information online is increasingly important. Far more than half of the consumers surveyed in the Global State of Multichannel Customer Service Report said they have used a search engine to try and find an answer to a customer service question. And more than 90 percent of all consumers expect a brand or organization to offer a self-service support portal or frequently asked questions (FAQ) page where customers can find the information they need online. A majority say they have a more favorable view of a brand or organization that offers a mobile responsive support portal.

For customers who have used a self-service portal for service, they cited too little information as the key cause of a disappointing experience.

Have you ever used a search engine to try and find the answer to your customer service question?	**Do you expect a brand or organization to offer a self-service customer support portal or FAQ page?**	**Do you have a more favorable view of a brand or organization that offers a mobile responsive self-service portal?**	**If you have used a self-service portal for customer service, did you find the answer or information you were looking for?**
United States	United States	United States	United States
Yes **75%**	Yes **92%**	Yes **50%**	Yes **78%**
United Kingdom	United Kingdom	United Kingdom	United Kingdom
Yes **72%**	Yes **92%**	Yes **43%**	Yes **74%**
Brazil	Brazil	Brazil	Brazil
Yes **92%**	Yes **98%**	Yes **86%**	Yes **88%**
Japan	Japan	Japan	Japan
Yes **61%**	Yes **82%**	Yes **59%**	Yes **71%**

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Driving Self-Service Convenience

United States

- 16% Disorganized information
- 12% No search capability
- 5% Too much information
- 4% Outdated information
- 63% Too little information

United Kingdom

- 55% Too little information
- 17% Disorganized information
- 15% No search capability
- 7% Too much information
- 5% Outdated information

Brazil

- 23% Disorganized information
- 13% No search capability
- 8% Outdated Information
- 5% Too much information
- 51% Too little information

Japan

- 19% Disorganized information
- 10% No search capability
- 6% Too much information
- 5% Outdated information
- 61% Too little information

If you did not find the resolution or info you were looking for, what was the key issue?
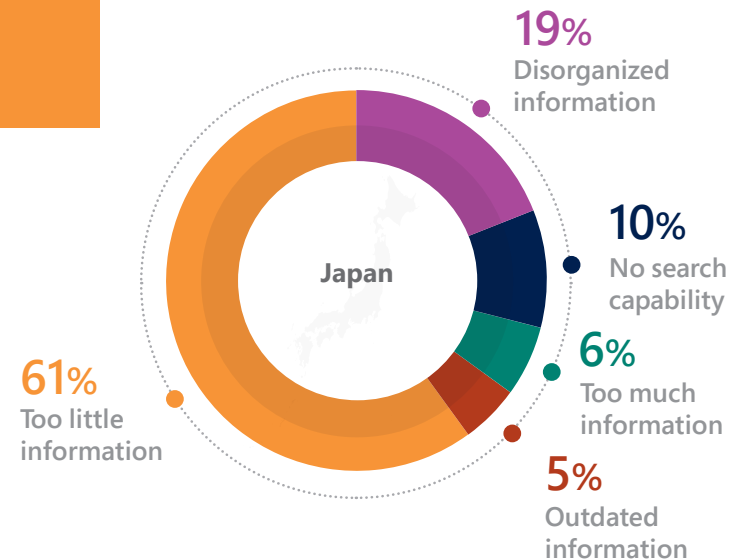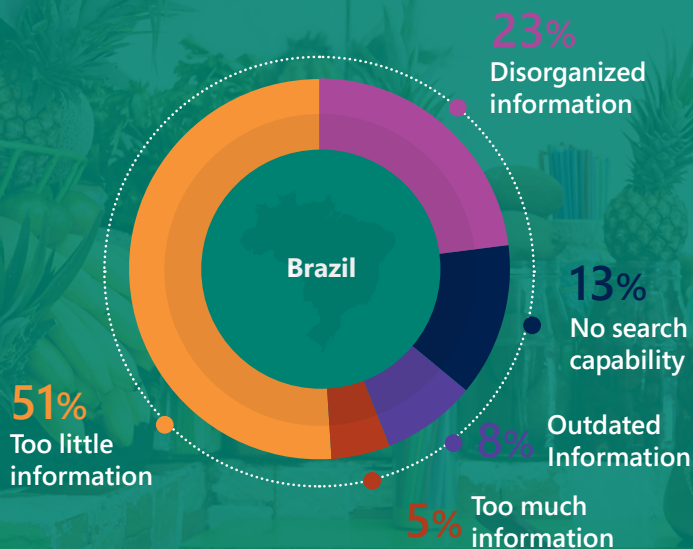
Going Social

If you believe that social customer service is just for upset customers wanting to vent their frustrations, think again. When consumers were asked if they had either complained about or praised a brand's customer service on social media, more consumers globally had used social media to praise a brand rather than to complain about it.

This may be due to the fact that social customer responsiveness by brands and organizations is on the rise. While just a third of global consumers said that they have recently used social media to ask a customer service question, whether it was asking a question, praising or complaining about customer service, 83 percent said that the brand or organization responded to their post or tweet.
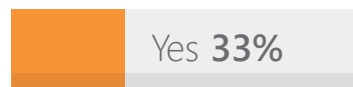
While far more than half of global customers now expect a social media response within 24 hours (66 percent), the benefit for those brands and organizations that respond is great: 56 percent say they have a more favorable view of those brands and organizations that respond to their customers on social media.
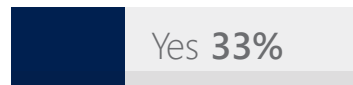
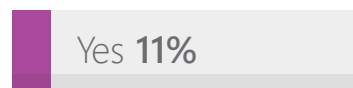| **Have you ever used social media to ask a customer service question?**	**Have you ever used social media to praise a brand's customer service?**	**Have you ever used social media to complain about a brand's customer service?**	**Thinking about the last time you used social media to ask a customer service question, did the brand or org. respond?**	**Do you have a more favorable view of a brand or org. that responds to cust. service questions, praise or complaints on social media?**
United States	United States	United States	United States	United States
Yes **33%**	Yes **50%**	Yes **38%**	Yes **83%**	Yes **50%**
United Kingdom	United Kingdom	United Kingdom	United Kingdom	United Kingdom
Yes **33%**	Yes **38%**	Yes **32%**	Yes **82%**	Yes **43%**
Brazil	Brazil	Brazil	Brazil	Brazil
Yes **59%**	Yes **62%**	Yes **55%**	Yes **84%**	Yes **85%**
Japan	Japan	Japan	Japan	Japan
Yes **11%**	Yes **6%**	Yes **6%**	Yes **81%**	Yes **44%**
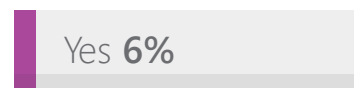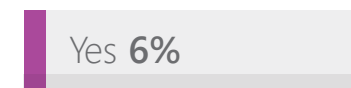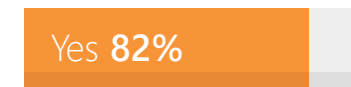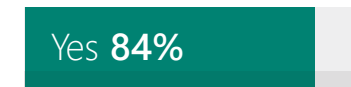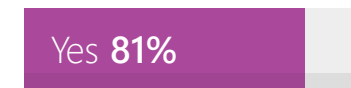
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Going Social

14%
Less than 1 hour

25%
48 hours or less

25%
I don't expect to get a response

United States

46%
24 hours or less

14%
Less than 1 hour

12%
48 hours or less

22%
I don't expect to get a response

United Kingdom

51%
24 hours or less

What is your expected response time for social media questions or complaints?

3%
I don't expect to get a response

15%
48 hours or less

22%
Less than 1 hour

Brazil

60%
24 hours or less

16%
Less than 1 hour

30%
I don't expect to get a response

Japan

40%
24 hours or less

14%
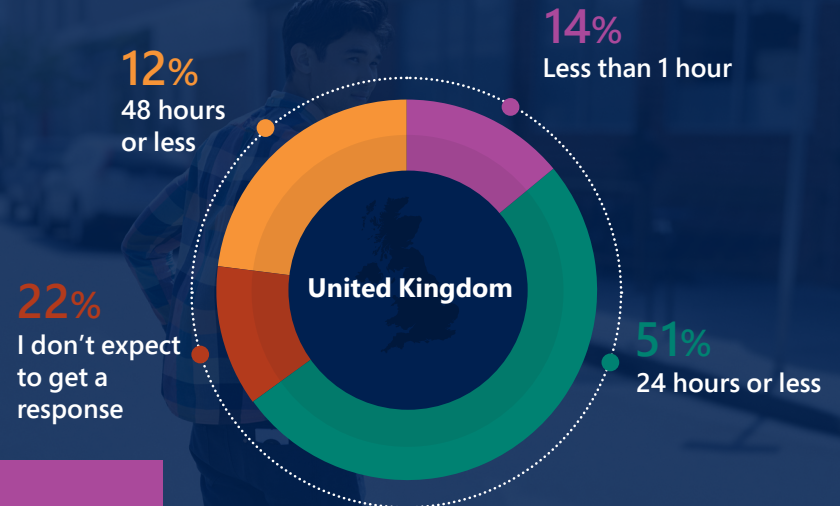48 hours or less

Microsoft
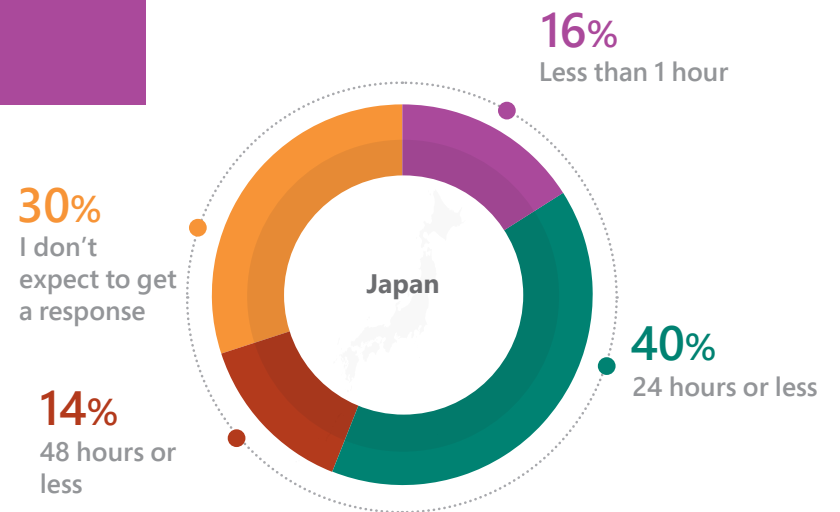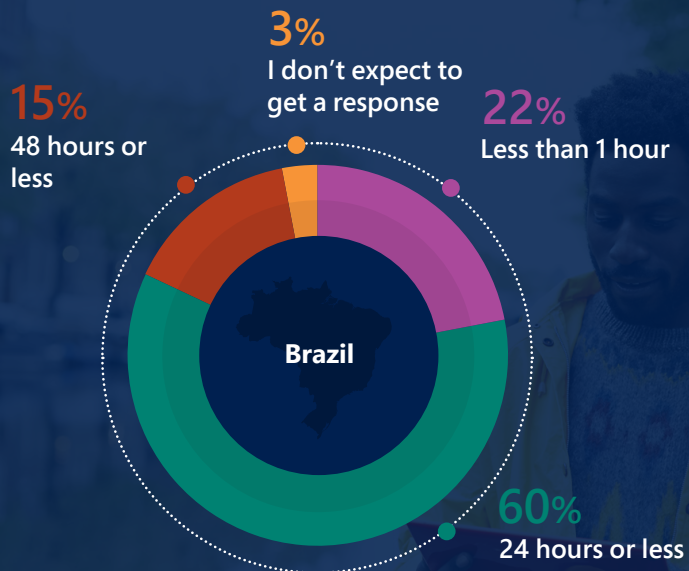
The Increasing Importance of Customer Service

Customer expectations are changing and growing just as rapidly as the channels and technology consumers are now empowered with to engage, encouraging (if not demanding) that brands and organizations embrace a strategy of non-stop, customer-centric adaptation. Is it worth the investment and effort to keep trying to be a leader when it comes to customer service on a regional, national or even global scale? You bet.

When asked how important customer service was in their choice of or loyalty to a brand, 97 percent of global consumers surveyed (100 percent in Brazil) said it was somewhat or very important. Brands and organizations must be wary though to simply maintain their current customer service efforts, as almost 60 percent of consumers said they have higher expectations for customer service now than they had a year ago.

How important is customer service in your choice of or loyalty to a brand or organization?

United States
- **Very Important (67%)**
- Somewhat Important (31%)
- Not Important (2%)

United Kingdom
- **Very Important (59%)**
- Somewhat Important (38%)
- Not Important (3%)

Brazil
- **Very Important (87%)**
- Somewhat Important (13%)
- Not Important (0%)

Japan
- Very Important (32%)
- **Somewhat Important (61%)**
- Not Important (7%)

Do you have higher expectations for customer service now than you had a year ago?

United States
- Yes (56%)

United Kingdom
- Yes (53%)

Brazil
- Yes (79%)

Japan
- Yes (46%)

Overall, do you think customer service is better or worse than it was a year ago?

To end this year's survey on a high note, however, for all those hard-working customer-centric brands, organizations, teams and agents out there, an impressive 71 percent of those polled for this survey say that overall, they believe customer service is getting better. For those brands and organizations taking action, your hard work is paying off.

United States
- Better (62%)

United Kingdom
- Better (67%)

Brazil
- Better (78%)

Japan
- Better (75%)

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Conclusion

The perception of customer service within all organizations is quickly changing. What was once viewed as a cost center by most is increasingly being seen as a value center for those brands and organizations that invest in the strategy, staff and solution to empower every employee to deliver consistently satisfying service and information across channels.

For those with a customer-centric focus and passion, there has never been a more exciting time to be in customer service. As price and product become easier to compete against, especially in a now global market, a unique and successful service culture becomes the last and a lasting differentiator to obtain and retain customers.
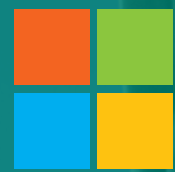
While this Global State of Multichannel Customer Service Report provides an at-a-glance view of customer preferences, experiences and expectations from different locations around the world, there are some lasting takeaways to be gleaned from this report:

1. **Channel preferences are changing based on the customer's perceived value and satisfaction from time spent.** This encourages brands and organizations to focus on better availability, quality and organization of knowledge on self-service channels to lower costs, empower agents and customers, and to increase customer satisfaction and first contact resolution across every touchpoint.

2. **Consistently satisfying service is increasingly important.** With 97 percent of global consumers surveyed saying customer service is somewhat or very important in their choice of or loyalty to a brand, and 62 percent saying that they've stopped doing business with a brand due to a poor customer service, the investment in service and engagement and innovations to empower agents, employees and customers can no longer be ignored or postponed.

3. **Multichannel customer service is good; but omnichannel customer service is desired.** Brands and organizations are stepping up to the plate in engaging on more channels before, but a seamless customer experience where customers aren't passed between agents and don't have to repeat their information across channels and service interactions is what's desired. Customer expectations are rising year over year. Have your service capabilities also improved?

The customer is now in control of your brand or organization's reputation and revenue – and every interaction with every agent or employee could mean the gain, loss or loyalty of that customer. Ensure that your culture, technology, brand promise and employees are all aligned to support customer experience, success, service and satisfaction.

"Customer service is not a department; it's everyone's job."

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