

2016



EPTICA MULTICHANNEL CUSTOMER EXPERIENCE STUDY



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1/ EXECUTIVE SUMMARY

Delivering the best customer experience is central to business success in today's hypercompetitive markets. Meeting the rising customer service demands of consumers is crucial if brands are going to differentiate themselves from their rivals, engage with customers and build ongoing, loyal and profitable relationships.

Achieving this is becoming more and more difficult. Not only are consumers continually demanding more but they are using an increasing number of ways to contact companies, often through multiple channels during the same interaction. The volume of contacts is growing markedly, particularly on digital channels such as email, social media and chat, while consumers want fast, consistent responses to increasingly complex queries. They aren't willing to wait or accept second class service – and will use social media as a megaphone to broadcast their feelings to the world.

Yet despite the importance of the customer experience, UK brands are struggling to deliver consistent, high quality, multichannel customer experience. Companies that excel on one channel, fail to respond at all on others, while response times for many organisations have moved from minutes and hours to days and weeks. Some companies are moving ahead when it comes to the service they deliver, while others are lagging badly.

These are the headline findings of the 2016 Eptica Multichannel Customer Experience Study. Building on research carried out over the last five years, this analysed the responses of 100 leading organisations, split between ten sectors, when it came to the web, email, chat, Facebook and Twitter channels. Researchers tried to find answers to ten sector-specific questions on each company's website and asked a single question via each of the email, Twitter, Facebook and web chat channels.



1/ EXECUTIVE SUMMARY

As in previous years, company websites are the strongest channel for customer service, with companies successfully answering 66% of questions on average, up 2% from last year. Yet this improvement masked a yawning chasm between best and worst. 11% of companies scored 100%, yet 10% scored 30% or under.

The email channel has become slower, less accurate and less available. 10% fewer companies made email available to non-customers than in 2015 and the average time taken to answer emails increased by nearly 5 hours, to 34 hours 15 minutes. Again, there were major differences between industries. No consumer electronics manufacturer provided a successful answer (with one address bouncing!), yet 8 out of 10 insurers responded accurately.

For consumers looking for a response to their queries, the best option is to turn to social media. Twitter and Facebook were both significantly faster and more accurate than email, even if neither were able to answer more than half of questions asked. 48% of companies responded successfully on Twitter, with an average time of 4 hours 14 minutes, double the speed of last year, while Facebook was both less accurate (44% success rate) and significantly slower on average, at 8 hours 37 minutes.

More companies have implemented web chat but the majority are not providing the resources the channel requires. Only 16% had it working when tested, even though 44% claimed to offer it.

Companies understand the vital importance of the customer experience but are struggling to deliver joined up, multichannel service. Therefore, they need to focus on how they can improve their performance by listening to consumers and adopting best practice from leaders in the market.

To assist with this learning process, this study includes comparisons between key channels and sectors, as well as a best practice guide for those looking to understand and improve their performance.



2/ INTRODUCTION

Customer experience is now the battleground for companies looking to engage with consumers. The relationship between brands and consumers has shifted dramatically - fail to provide the service that they require and customers will simply move to the competition. 45% of consumers will abandon an online transaction if their questions or concerns are not addressed quickly¹ and 82% of upset customers will switch to a rival if companies failed to put right their mistakes².

Not only have consumer expectations grown dramatically, but so has the range of channels they want to use. Customers want to be able to contact you through their channel of choice and receive fast, consistent answers to an increasing volume of complex queries.

To see how leading UK companies are coping with these challenges multichannel customer interaction software vendor Eptica has researched the state of customer service regularly since 2012. Its study evaluates real-world performance by contacting companies over multiple channels, asking the same questions that consumers do, and then measuring their ability to deliver fast, accurate answers.

100 leading companies from the insurance, travel, entertainment retail, food retail, electronics retail, electronics manufacturers, utilities, fashion retail, telecoms and banking sectors were evaluated. 2016 marked the first time that Facebook performance was tested, alongside Twitter, chat, web and email.

The research covered:

- 1. Ability to find answers to ten basic, sector-specific questions via their websites*
- 2. Speed and accuracy of responses via email, Twitter and Facebook*
- 3. Speed and accuracy of responses via web chat*
- 4. Consistency across all of these channels*

The Study findings point to an increasingly polarised picture of customer service. Some companies (and channels) are pulling away from the pack, but others are worsening rapidly.

The overall percentage of queries successfully answered has crept up, with 51% (up from 48%) of questions asked on the web, email and Twitter channels receiving an accurate response. Yet, the performance of 65% of companies worsened or remained the same on the web, and the time taken to answer emails rose by nearly 5 hours.

¹ Source Forrester Research: "Consumers drive channel preference to achieve effortless customer service"

² Source Eptica: "Brands risk customer churn by failing to understand consumers on digital channels"



2/ INTRODUCTION

Despite the importance of the customer experience, and the success of certain companies, there has been little overall improvement. Customer service increasingly resembles a game of Russian roulette, with consumers having to hope they will be lucky when it comes to receiving an accurate, consistent response. **The 2015 Eptica Multichannel Customer Experience Study demonstrates ten key trends in customer service:**

1. The web still provides the best chance to get a fast, accurate answer from a company, with 66% of answers to common consumer questions now available online. However, this 2% improvement from 2015 hides an incredible range of scores. One entertainment retailer failed to fully answer a single question, yet another in the same sector asked the same 10 questions successfully, scoring 100%.
2. Even if overall web performance is improving, the gap between best and worst is becoming a chasm. 37 companies scored 80% or higher, yet 26 couldn't achieve more than 50% and six scored 20% or less.

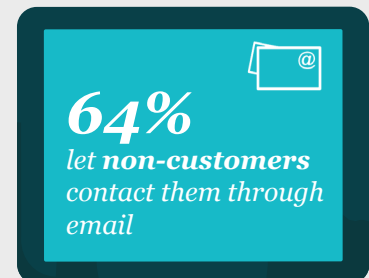
<i>Score</i>	<i>2012</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>
<i>10</i>	1	1	9	11
<i>9</i>	6	8	10	8
<i>8</i>	10	13	18	18
<i>7</i>	12	22	20	18
<i>6</i>	17	24	12	19
<i>5</i>	21	12	14	9
<i>4</i>	14	7	9	7
<i>3</i>	10	9	2	4
<i>2</i>	6	4	2	3
<i>1</i>	2	0	2	2
<i>0</i>	1	0	2	1

Company scores out of 10

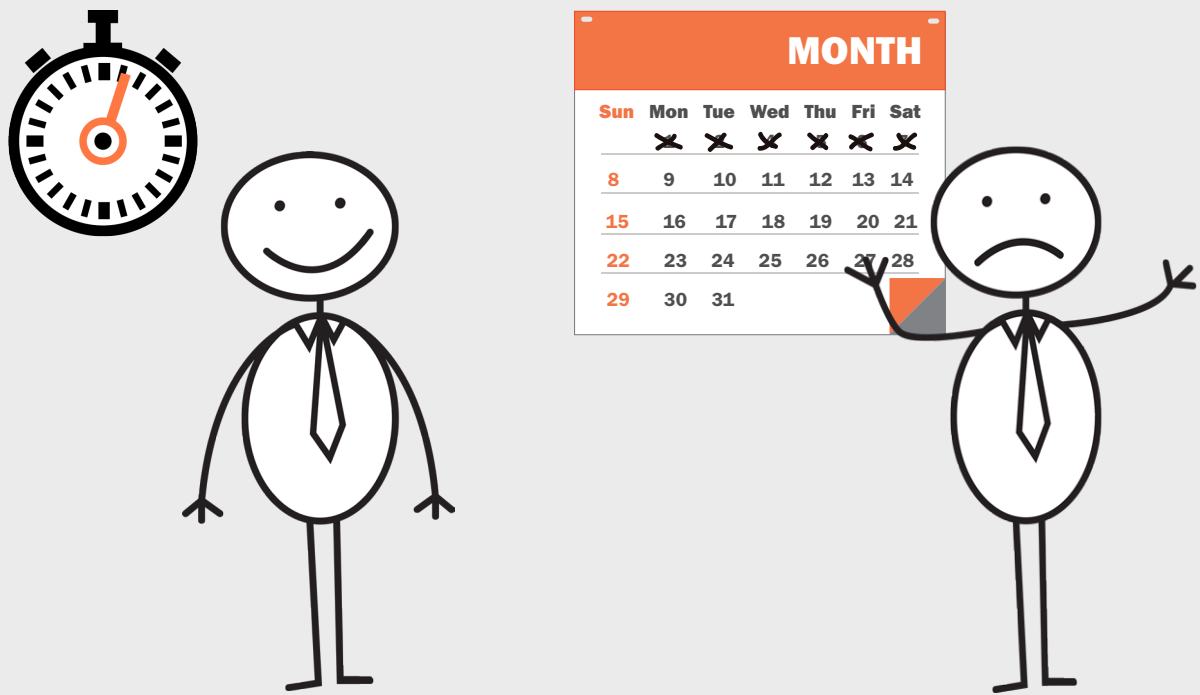
2/ INTRODUCTION

3. In 2015 email made major improvements in terms of availability, accuracy and speed. This progress was abruptly reversed in 2016, with performance worsening in all areas.

The number of brands allowing non-customers to email them dropped by 10% to 64%, meaning that well over a third of companies simply aren't interested in engaging with potential customers on email.



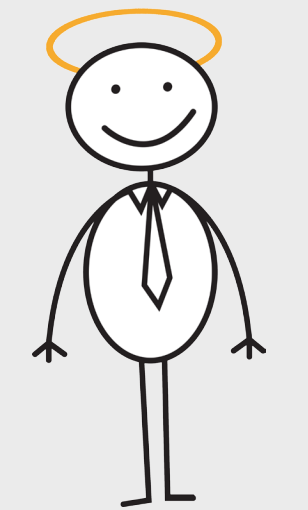
4. Speed of successful response also slowed on email. In 2015 it was 29 hours 27 minutes – in 2016 this lengthened to 34 hours 15 minutes. **Response times varied wildly – from 3 minutes to over 6 days.**



5. Those that received a response via email should consider themselves lucky, with just 38% of companies providing an accurate answer, well behind Twitter and Facebook.
6. Social media showed that it is both faster and more likely to deliver successful responses to consumer questions. **However, with only 44% of questions asked on Facebook and 48% on Twitter receiving an accurate answer, this means over half of routine queries are not being responded to successfully.**

2/ INTRODUCTION

7. Social media was also the fastest channel for receiving a response but with big differences in performance between them. It took an average of 8 hours 37 minutes to get an answer on Facebook, more than double that of Twitter (4 hours 14 minutes).
8. Despite its promise of speed, efficiency and personalisation web chat continues to be underused. In 2015 26% of companies claimed to offer chat though just 8% of companies had it working when tested. This year saw a major growth in those advertising chat (44%), though just 16% had it available when surveyed. The performance of those offering chat has actually deteriorated, with 75% of companies with working chat successfully answering the question, down from 89% in 2015
9. Companies are failing to deliver multichannel, consistent service. Just one answered on email, chat, Twitter and Facebook, and 69% failed to provide responses that matched across more than one channel. In fact 22% didn't respond at all on any of the four channels above.



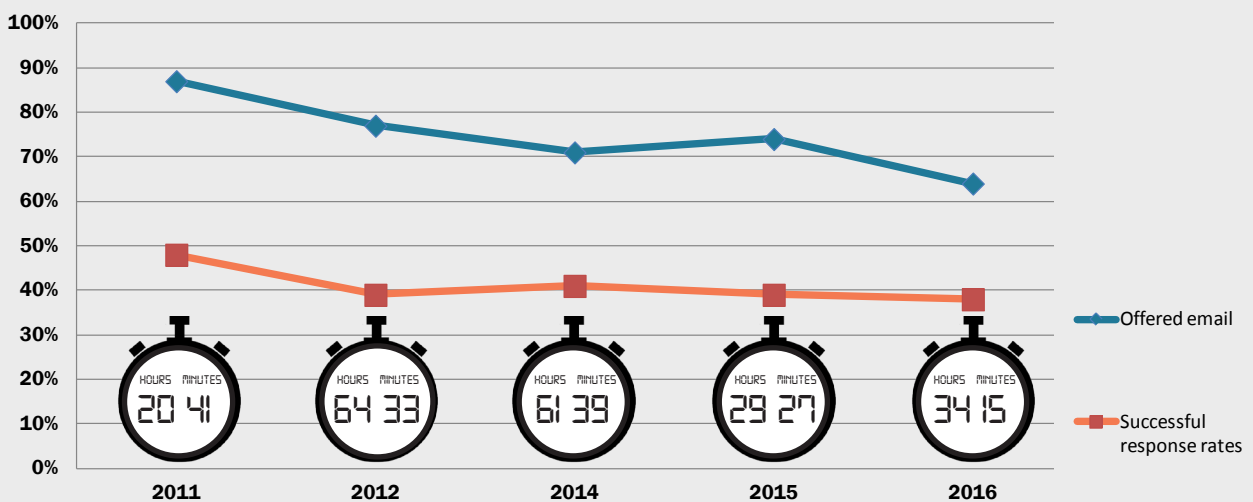
*Just **one** company out of 100 answered across email, chat, Twitter and Facebook (1/100)*

3/ KEY FINDINGS

The results of the 2016 Eptica Multichannel Customer Experience Study illustrate ten key customer service trends:

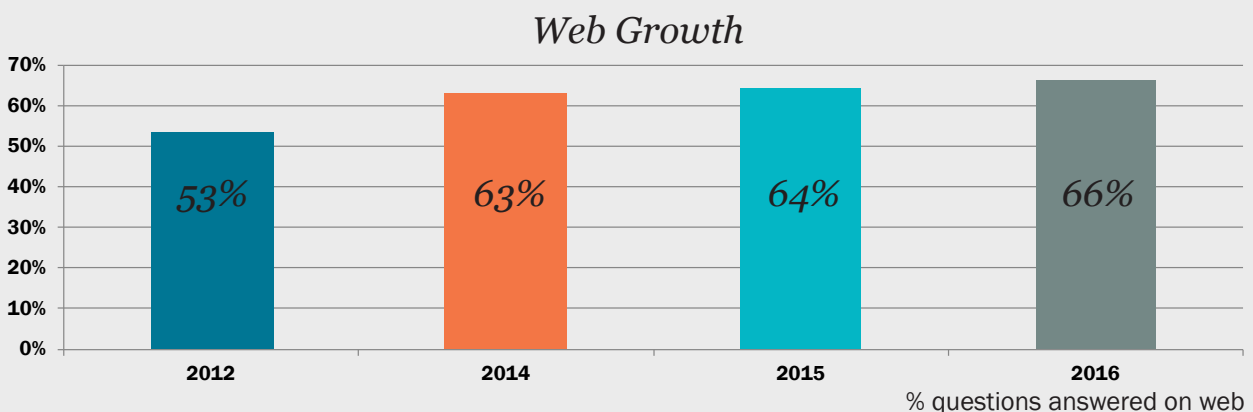
1. EMAIL IS BEING OVERLOOKED

While there were some exceptions, year-on-year performance on the email channel worsened considerably. There was a dramatic drop in the number of companies allowing non-customers to email them, down from 74% in 2015 to 64% in 2016. Accuracy of response was also lower, falling to 38% of companies providing a satisfactory answer. Many companies seem to have given up on keeping customers informed - just 34% gave an estimated time of response. These ranged from the vague (12 companies said ASAP) to the frankly unacceptable, with one travel company promising to answer in 14 days. The average response speed of 34 hours 15 minutes was nearly five hours longer than 2015.



2. HAS THE WEB STALLED?

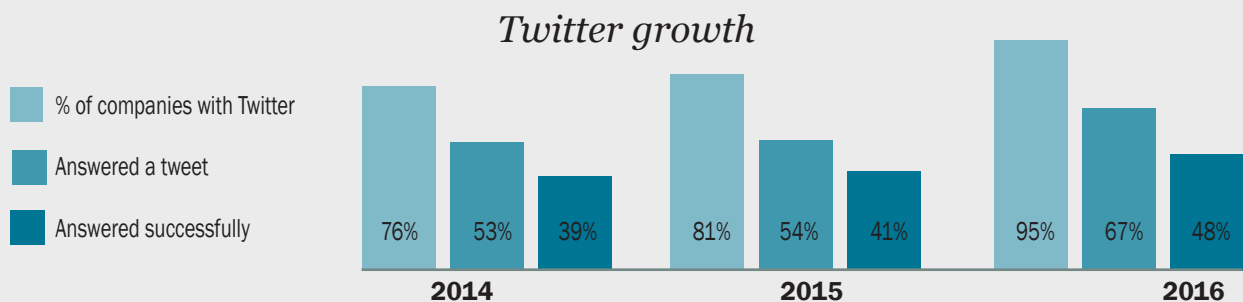
For consumers looking for answers to their queries, company websites are the best place to start. Two thirds (66%) of questions could be answered online, a dramatic growth from 2012's figure of 53%. However, progress seems to be stalling, with just a 2% improvement from 2015's overall figure. There is a definite gulf developing between best and worst – 11 companies scored 10 out of 10, yet several only managed to answer 1 or 2 questions. These laggards are not concentrated in specific industries – 7 out of 10 sectors had at least one company that only answered half or fewer questions. It is time that companies therefore looked at learning from their peers if they want to improve the online customer experience



3/ KEY FINDINGS

3. TWITTER – THE BEST CHANNEL FOR DIGITAL RESPONSES

In the three years we have been surveying Twitter it has strengthened considerably in the speed and accuracy of responses to customer service queries. 95% of companies had Twitter (up from 81% in 2015), with many now offering dedicated customer service handles. Over two thirds (67%) replied to tweets and 48% gave a satisfactory answer. This was 7% up on 2015, and sees Twitter pull further ahead of email when it comes to accuracy. Average speed dropped by over an hour, down from 5 hour 27 minutes in 2015, to 4 hour 14 minute in 2016. However, this still means under half of tweets are being successfully answered, showing the channel is not fully mature.



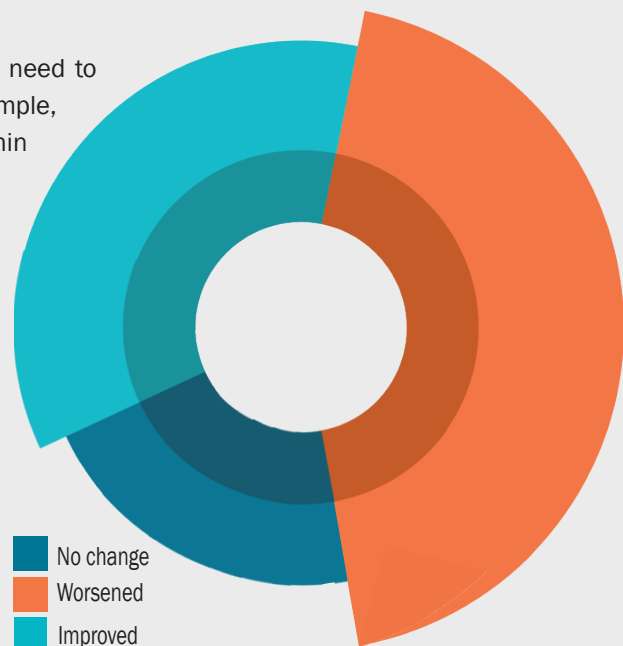
4. FACEBOOK IS PATCHY

For the first time we also surveyed customer service on Facebook and the results show that many companies treat it as a channel more for engagement than service. While 83% had a Facebook presence, just 56% responded to a direct message or post and only 44% then successfully answered that query. While this is ahead of email, it is behind Twitter, for both accuracy and speed. The average time to receive a satisfactory answer was 8 hour 37 minutes, over double that of Twitter. One company took 125 hours to reply and no food and wine retailer successfully answered on the channel.

5. CONSUMERS WANT MORE

Companies cannot afford to rest on their laurels and need to keep improving as customer demands increase. For example, 64% of consumers want a response to their tweet within an hour³ – a target that only 30% of companies met.

The performance of 65% of companies either worsened or stayed the same on the web, despite the Study asking the same questions as in 2015 – this shows that many companies have gone backwards over the last twelve months. Failing to deliver what consumers want – particularly when rivals do provide fast, accurate service, is likely to hit loyalty and, consequently, revenues.

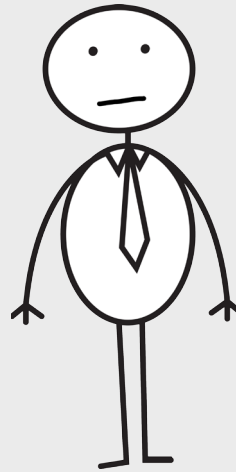


³ Source Epica: Retail Infographic 2015

3/ KEY FINDINGS

6. LIVING IN A UNI-CHANNEL WORLD

Last year we noted a trend of companies failing to offer multichannel service, by responding on a single channel - or not at all. This uni-channel approach seems to be spreading, 18% of companies only answered accurately on a single channel from email, Twitter, chat, and Facebook, while nearly a quarter (22%) failed to respond successfully on any channel. Resources seem to be stretched thinly, with only one company answering on four channels – hardly the multichannel approach that consumers are looking for. Failure to deliver on one channel will drive frustrated consumers to either make contact again (pushing up costs), or will lead to them switching to rivals.



*22% failed to respond successfully on **any** channel*

7. INCONSISTENCY RULES

As well as speed and accuracy, consumers long for consistency between channels because receiving wildly different answers is confusing, inefficient and damaging to the overall experience. Nevertheless, 69% of companies failed to provide any consistency between the email, chat, Twitter and Facebook channels – either because they didn't answer on one or more of them, or because their responses simply didn't match. Just 31% were consistent across two or more channels. **The one company that answered on all four channels, provided two sets of answers, with Facebook and Twitter matching, as did chat and email.** This points to silos of information within the organisation, adding to costs and hurting the consumer experience.

8. CHAT IS FAILING TO DELIVER

On paper chat appeared to make a major step forward in 2016, with 44% of companies claiming to offer the channel, up from 26% in 2015. However, when we returned to some sites to evaluate chat we found that a huge number had it switched off or had made it only available to existing customers. While this concentrates resources on those with an existing relationship and known value, it seems strange to ignore potentially lucrative prospects.





We were only able to hold chat sessions with 16 companies and, overall, these were slower and less successful than in 2015. Four companies were unable to answer the question at all, pushing the consumer to other channels (such as the telephone or email), negating the instant, personalised and efficient nature of chat. This led to a success rate of 75% amongst those that offered chat, with the average session being 7 minutes 40 seconds, nearly 30 seconds longer than 2015. Given that the average duration of a customer service phone call is 4 minutes 58 seconds⁴ and that agents can handle multiple chats at the same time, this demonstrates the efficiency gains that chat delivers.

⁴ Source: Contact Babel The UK Contact Centre Decision-makers Guide 2015

3/ KEY FINDINGS

9. THE CHANNEL PERFORMANCE GAP

Illustrating the uni-channel approach to service, many sectors and companies that scored highly on one channel were then found languishing at the bottom of the table on others. For example, one entertainment retailer answered a question on Facebook in 6 minutes, yet took 152 hours to respond to the very same query on email and 4 hours on Twitter. The insurance sector answered 80% of emails but just 45% of online questions. This shows a lack of joined-up thinking, with each channel run in isolation, sharing neither knowledge nor resources. Not only does this frustrate consumers but also makes operations much less efficient, as agents on one channel are under-utilised while their colleagues on others are drowning in a tsunami of emails or tweets.

<i>Rank by sectors</i>				
Banking	8th=	4th=	8th	1st
Telecoms	8th=	1st	4th	7th
Electronics Retailers	2nd	9th=	2nd	6th
Fashion Retailers	4th	2nd	1st	2nd
Insurance	1st	4th=	7th	9th

10. HEADS OR TAILS?

Overall, across email, the web and Twitter, 100 of the UK's leading brands were only able to correctly answer 51% of questions that were put to them. This means, that despite improvements by individual companies or channels, approximately half of questions were left unanswered or required the consumers to re-contact for clarification. Essentially, consumers have as much likelihood of getting a response to their query as they have of guessing whether a coin flipped in the air will land showing heads or tails. Given the importance of customer experience, this shows a lack of focus and resources from some of the UK's largest organisations.



4/ CUSTOMER SERVICE VIA THE WEB

For the majority of consumers, the web is now their primary method of interacting with brands and researching and making purchases. Nearly 45 million UK adults regularly use the internet¹, and spent an estimated £114 billion in the retail sector alone². This self-service approach means that even for the most complex activities consumers will make decisions without talking directly to an organisation through email, telephone or visiting a branch.

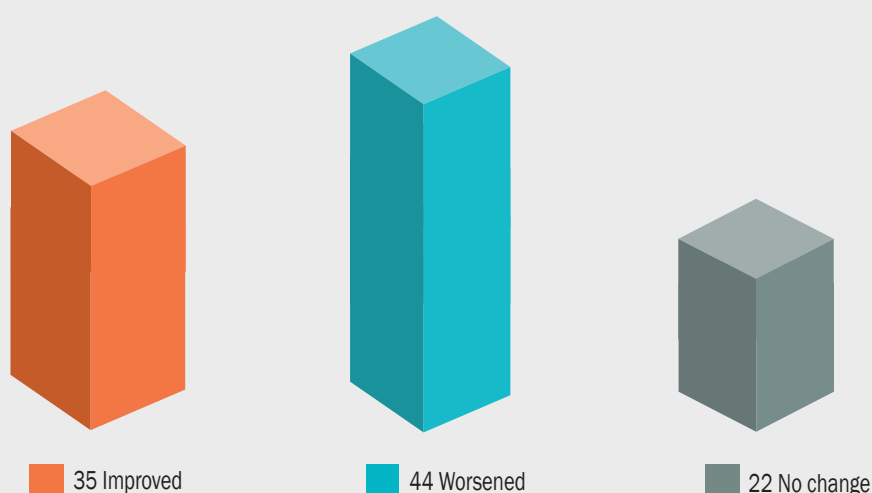


The rise of mobile devices has accelerated this trend. Smartphones have overtaken laptops as the number one means of getting online, with the average user spending 2 hours every day on the web, double the time on laptops or PCs³. This means that companies have to ensure that their website is not only optimised for their needs but that customers can quickly find the answers they want. Otherwise frustrated consumers will simply head over to rivals – and companies won't have the chance to repair the damage. According to Accenture, 64% of consumers switched provider due to poor service – and 80% of these defections could have been prevented by better resolution of their issue⁴.

On the positive side, more and more of Britain's top companies are delivering the information that consumers want online. The websites of the 100 brands surveyed by the 2016 Eptica Multichannel Customer Experience Study provided answers to two thirds (66%) of questions posed. This was up 2% on 2015 and 13% on 2012.

However, web customer service seems to have reached a plateau. Given that broadly the same companies were asked the same questions as in 2015 (and 2014), you would expect a larger step forward in performance from them. Yet 44 companies actually provided worse service, with 22 remaining static and only 35 improving. It seems that many companies are satisfied with their online customer service and have switched new resources to other channels. The danger of this is that consumers are continually demanding more – today's leaders are likely to become tomorrow's stragglers unless they invest in updating and extending the service they offer.

2016 Performance



¹ Source Office for National Statistics: Internet Users, 2015

² Source IMRG/Capgemini: UK online spending rises by 11% to £114bn in 2015

³ Source Ofcom: The UK is now a smartphone society

⁴ Source Accenture: Global Consumer Pulse Research

4/ CUSTOMER SERVICE VIA THE WEB

THE GULF BETWEEN BEST AND WORST

Looking at individual companies and sectors, there is a widening gap developing between leaders and also-rans, with the majority clustering in the middle. 11% of companies scored a maximum 100% online, while 10% managed only 40% or under. Over half (53%) of companies were mired in the middle, scoring between 40-70%. The range within certain sectors was startling – one entertainment retailer scored 100% and another 5% (failing to fully answer any questions at all).

11% of companies answered all **10** questions online



26% of companies answered between **8-9** questions online



53% of companies answered between **5-7** questions online



10% of companies only answered **0-4** questions online



Nevertheless, some sectors are delivering a better online experience than others. **The worst scoring companies in banking and fashion scored 70%, which was better than the top performers in insurance who achieved only 60%.**

BANKING FALLS BACK, BUT STILL LEADS

Last year, banking made dramatic improvements, leading to an overall online score of 91% and pushing fashion into second place. In 2016 banking remained top, but its performance had slipped, with a total score of 84%, marginally ahead of fashion (83.5%). The biggest improvement came from the utility sector, where the average score increased by 15%, from 66% to 81%.

Five out of ten sectors performed worse year-on-year, with consumer electronics manufacturers dropping most by 10%. Entertainment retailers propped up the bottom of the table, dropping 8% since 2015.

4/ CUSTOMER SERVICE VIA THE WEB

THE RISE OF SELF-SERVICE

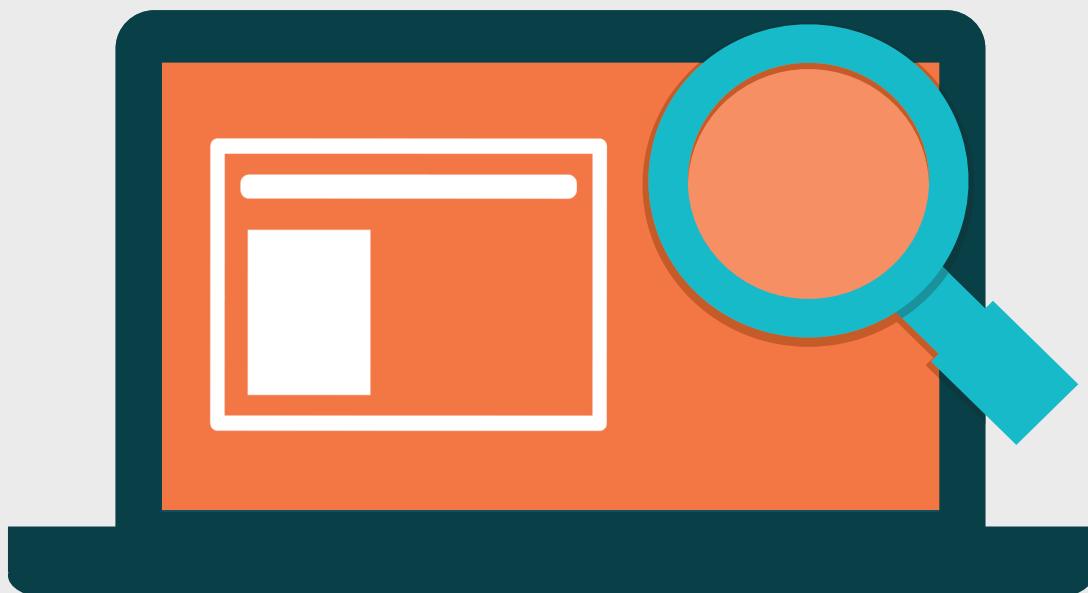
Consumers don't want to break off their browsing to email or call to receive answers to their queries. Consequently, they are enthusiastic users of web self-service systems that allow them to ask questions in their own words as well as receive fast, accurate answers from a centralised knowledge base. In fact, according to 2015 Forrester research, more people are now using self-service than are calling an organisation, a major change since 2012¹ when this survey was first published.

Self-service also benefits organisations by increasing efficiency. Answering a question through self-service has a negligible cost, compared to an average of £2.67 for email and £3.50-£4.00 for phone, according to analysts Contact Babel².

These factors are driving a major increase in the use of web self-service systems, with 68% of companies making it available on their sites in 2016, up from 56% in the previous years. This directly correlates to improved performance.

Much of the overall improvement in the online customer experience is due to this rise in self-service systems. The sector league table backs this up - 100% of banks and utilities have web self-service, but just 30% of entertainment retailers.

The importance of the web to consumers is deepening rapidly, driven by the uptake of smartphones and other mobile devices. As new 'internet native' generations increase their buying power, and other demographics, such as silver surfers, spend more time online, company websites will become ever more vital. It is therefore imperative that brands focus their resources on improving the service and experience they offer continually – or face losing consumers to rivals, hitting profits and long term prospects.



¹ Source Forrester Research: Customer Service Channel Usage Highlights The Importance Of Good Self-Service

² Source Contact Babel: UK Contact Centre Decision-Makers' Guide - Email Management

5/ EMAIL AND CUSTOMER SERVICE

Given its age and familiarity, it is easy to write email off as yesterday's channel.

Yet, nothing could be further from the truth. 69% of people still want to contact companies through email, according to Forrester¹, while in some sectors (such as retail), email makes up 30% of customer service interactions, with telephone making up the vast majority of the rest.



In fact, email is the workhorse of customer service, providing an easy to use, accessible and convenient way for consumers to contact brands, backed up by an in-built audit trail that acts as a written record of the conversation. **87% of consumers said it was their primary communications channel, ahead of Facebook, Twitter and chat².**

This means that despite the rise of newer channels, email volumes are increasing year-on-year, with even mid-sized organisations receiving hundreds of emails every day. Additionally, the queries raised on email are becoming more complex, leading to 61% of agents admitting that they couldn't easily understand what consumers wanted³. This is having a major impact on service levels - since the Eptica Multichannel Customer Experience Study began in 2012, performance on the email channel has worsened every year.

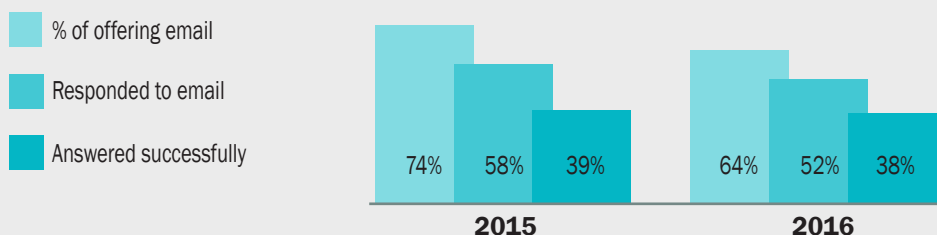
TIME TO FOCUS ON IMPROVING EMAIL

After slight improvements in 2015, the downward trend continued this year. While some companies and sectors enhanced their performance, the overall picture was of companies struggling to cope with the resources they have.

Many are simply giving up in the face of a growing deluge of emails. Just 64% of companies let non-customers contact them through email or text-based web forms on their sites. This was down from 74% in 2015, and was well below 2012's total of 87%. Those that did offer email often made it difficult to locate, forcing customers to go through FAQ pages or hunt around to find details hidden in obscure corners of their websites. This ignores the potential revenues non-customers could bring and risks future profits by turning away new business. If email is the workhorse of customer service, too many companies are putting it out to pasture.

Even amongst those companies that offered email, response rates and accuracy both declined in 2016. Just over half (52%) of companies answered emails with 38% successfully replying to the query. The corresponding figures for 2015 were a 58% response, and 39% success, rate, showing drops in both metrics. This means that consumers contacting brands on Twitter, and now Facebook, are more likely to receive an accurate response. Eight sectors worsened or stayed the same when it came to email accuracy.

Downward email trend?



¹ Source Forrester Research: Omni-Channel Communications Technology Adoption Profile

² Source Eptica: Power of Linguistics in Customer Service Study

³ Source Eptica: Power of Linguistics in Customer Service Study

5/ EMAIL AND CUSTOMER SERVICE

EMAIL – THE NEGLECTED CHANNEL

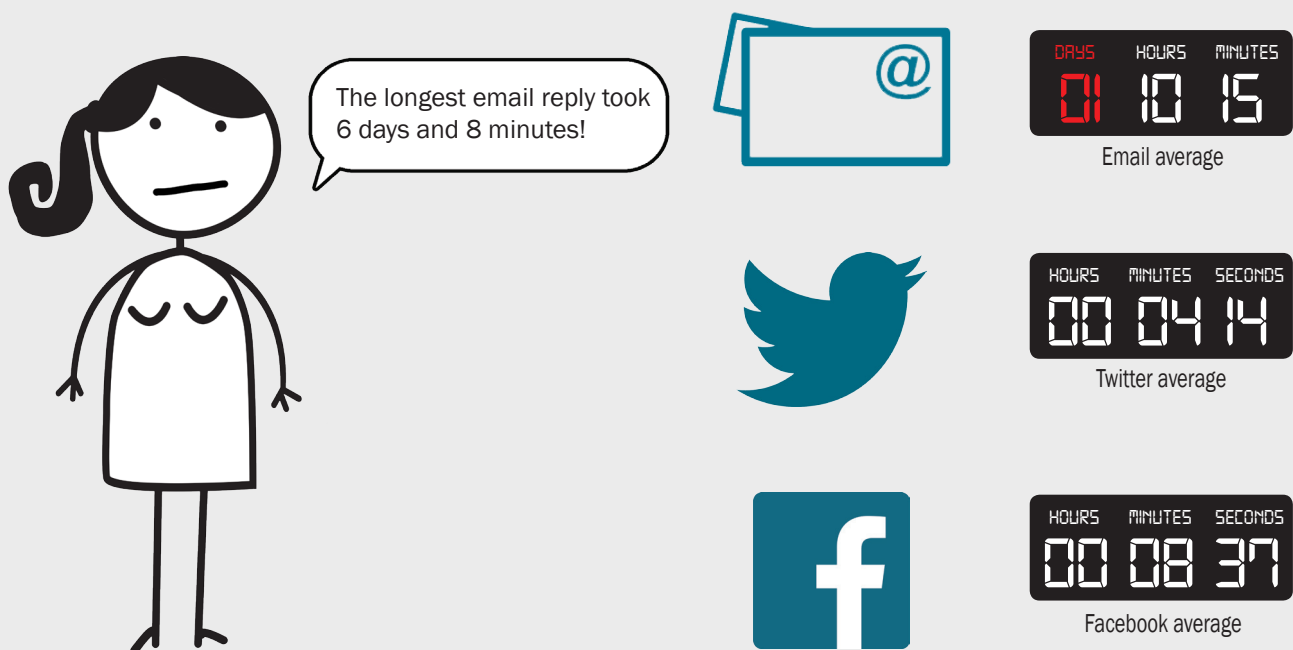
Overall, many organisations gave the impression that they had given up on the battle to stay on top of email. The email address listed by one consumer electronics manufacturer on its website bounced, while the web form provided by a telecoms company brought up an error message when submitted.

Just 34% of companies took the trouble to send an acknowledgement email with an expected timescale for a reply. 35% of these didn't bother to give a time, just stating they would respond 'ASAP', 'soon' or 'in due course'.

One travel company promised it would respond within 14 days. These acknowledgements can't have been designed to give consumers confidence that their query is important and will be dealt with speedily. Proving the point, just 50% of these organisations then met their own deadlines – **one that said ASAP took over 52 hours to reply.**

This translated into a much slower performance compared to last year, with an average successful response time of 34 hours 15 minutes, considerably slower than 2015's 29 hours 27 minutes. Compare this to the 4 hour 14 minute average when asking exactly the same question via Twitter, and the scale of the problem becomes clear.

Relative speed of response on Email, Twitter and Facebook



5/ EMAIL AND CUSTOMER SERVICE

THE EMAIL LEAGUE TABLE

Amidst all the gloom, insurance stood out as a real success story on email. Not only did 90% of companies in the sector offer email, but all of them responded. Moreover all but one successfully answered the question. This score of 80% (up from 50% in 2015) put the sector top for accuracy, ahead of electronics retailers (70%). It was also relatively fast, averaging 28 hours and 4 minutes.

The fastest average response came from telecoms at 33 minutes, but this was based on a single reply, and the sector finished joint bottom for accuracy. The fastest with multiple responses, consumer electronics retail, was much slower, providing nine answers in an average time of 25 hours, 16 minutes. **The utility sector was the most sluggish, taking over 64 hours on average. The sectors was not helped by one company answering in 4 days, although a rival took just under a minute to respond to the same question!**

Overall, just 10% of companies responded to email within 2 hours, despite separate Eptica research finding that 58% of consumers would like to receive a reply within this timeframe¹. Results were also well below Forrester research that found that 41 per cent of customers expect a response to their email within six hours². Just 14% answered within that deadline.

COPING WITH EMAIL OVERLOAD

Email is not going away, so while simply switching off the channel to non-customers may save resources in the short term, it will damage long term growth prospects. Companies therefore need to invest in the channel and find ways of improving performance to meet customer expectations.

Using technology that is based on linguistics (the study of language) can help manage growing email volumes in four key ways:

1. By analysing incoming messages, it can automatically suggest potential templates to agents, dramatically accelerating response times.
2. Companies can benefit by better understanding the tone (angry, happy, sad) of the message and use this to prioritise emails and measure longer term performance.
3. Making it possible to deliver joined-up service, with linguistics extracting information freely provided within emails (such as signatures) and using this to provide a multichannel view of the customer.
4. Linguistics can route emails to the right department or agent first time, reducing handling time and ensuring answers are faster and more accurate.



¹ Source Eptica: 2015 US Retail Multichannel Customer Experience Study

² Source Forrester Research: Customer service takes on greater importance in tough times

6/ SOCIAL CUSTOMER SERVICE

Social media has fundamentally changed the relationship between customers and brands, providing consumers with a mouthpiece to share their feedback with people across the world. The openness and simplicity of social media is therefore both a challenge and an opportunity for companies. Get it right and provide the personalised, fast response that consumers demand and you will boost engagement. Fail to deal with complaints on social media and they might go viral, damaging your reputation and even your stock price.



No wonder that nearly half of US consumers use social media for customer service¹, and Twitter's own analysis shows that tweets to major brands have increased 2.5 times over the past two years. That means over 4.5 million tweets are sent every month to B2C companies².

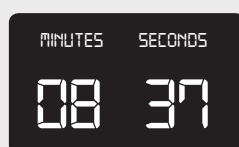
Coping with this increasing volume of interactions is difficult, and is further complicated by the real-time nature of social media. A tweet can be composed and sent in seconds, and consumers expect a response within similar timescales. **53% of customers who ask a brand a question on Twitter expect a response within one hour, rising to 72% if the tweet is a complaint³.**

Since 2014 the Eptica Multichannel Customer Experience Study has evaluated how UK brands respond to questions asked through a tweet sent directly to their official Twitter handle. In 2016 this was expanded to include Facebook. In both cases the same question was asked as through email and chat, allowing the Study to measure both response rates and consistency across digital channels.

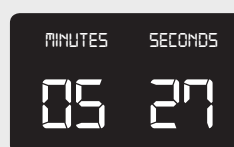
TWITTER CUSTOMER SERVICE – COMING OF AGE?

Turning first to Twitter, it cemented its position as the fastest and most accurate channel for customer service, stretching its lead over email. 48% of questions asked on the social network were answered successfully, up from 41% in 2015. Nearly every company (95%) had a presence on Twitter, with many now providing a specialist customer service handle for consumers to contact.

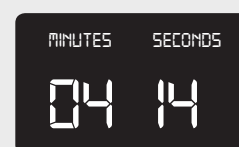
Average speed also improved, by over an hour to 4 hours 14 minutes from 5 hours 27 minutes. This did mask considerable differences – 11% of companies replied in under 10 minutes, while 15% took over 4 hours. In the utilities sector one company responded in 2 minutes yet another took 4 days 6 hours and 35 minutes to answer exactly the same question. Telecoms was the top sector with a 75% success rate, entertainment retailers and electronics retailers brought up the rear with a score of 30%.



2014 Twitter average



2015 Twitter average



2016 Twitter average

¹ Source Nielsen: State of the media - the social media report 2012

² Source Twitter: Customer Service on Twitter

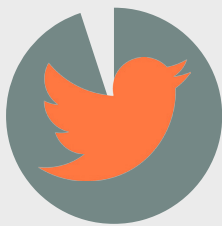
³ Source Lithium Technologies: 72% of customers expect complaints on Twitter to be answered in one hour

6/ SOCIAL CUSTOMER SERVICE

HALF OF TWEETS GO UNANSWERED

While Twitter customer service has improved, it is not yet fully mature. Successfully answering 48% of questions means that the majority (52%) did not receive a satisfactory response, showing there is still work to do. Many companies seem not to have integrated Twitter with overall customer service, for example one insurer that responded to an email in 49 minutes took 4 hours to answer the same question on Twitter.

Given its nature, consumers expect a fast response on social media and patience might be running out. 64% expect a response to their tweet within an hour¹, yet just 30% of companies achieved that target. Continually increasing speed of response, while maintaining accuracy when volumes are growing, is a challenge that brands must meet.



*While 95% of companies
were on Twitter*



*only 67% responded to
a tweet*



*with only 48% providing
an accurate response.*

TIME TO CHANGE THE STATUS OF FACEBOOK CUSTOMER SERVICE

This was the first year that Facebook customer service was tested, and it proved to be much less mature than Twitter. The number of companies on the social network was lower (83% vs. 95% on Twitter), and overall fewer companies successfully answered the question (44%). This put it ahead of email for accuracy, but points to a channel that has not yet been optimised for customer service. The average response time of 8 hours 37 minutes was over double that of Twitter, not helped by two companies that took over 100 hours to respond to a question.



Facebook average
successful response
8 hours 37 minutes



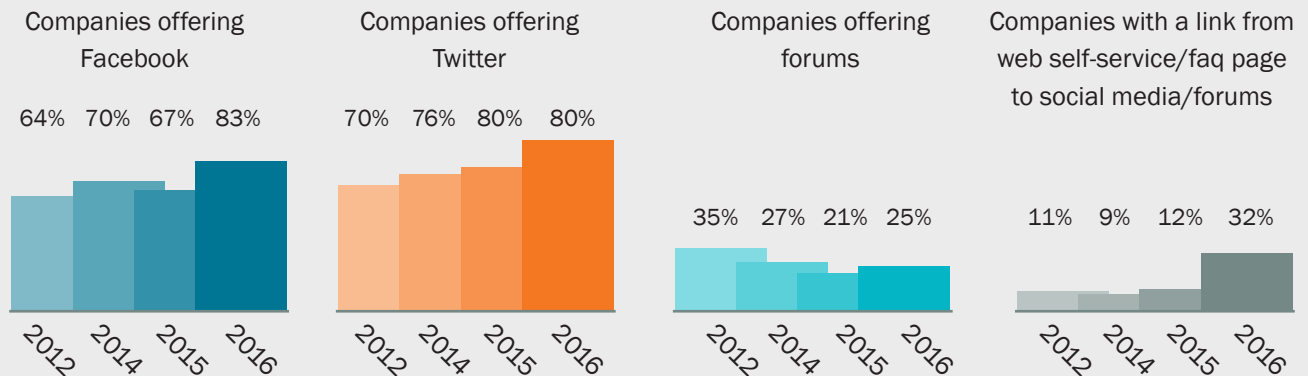
Twitter average
successful response
4 hours 14 minutes

¹ Source Eptica: What's the best channel for U.S. retail customer service?

6/ SOCIAL CUSTOMER SERVICE

Looking beyond the two social networks, the number of companies hosting their own forums, which provide a simple means of sharing technical information, grew from 21% to 25%, reversing a decline of several years. Companies are also looking to integrate social media more tightly with their web customer service, with 32% of companies providing a link from their web self-service or FAQ page to social media/forums.

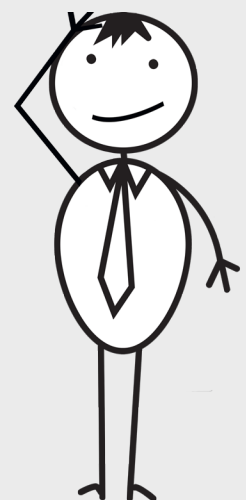
Companies and Social Customer Service



Overall, these results show a positive step forward for social customer service – accuracy is improving and it clearly surpasses email for both speed and response rates. However, with less than half of questions being answered successfully, companies must continue to invest in the channel as volumes increase.

It is also important to stress that the Eptica Multichannel Study only covers part of social customer service – messages sent directly to organisations, rather than mentions in general conversation. Companies should look at extending their operations to monitor for these opportunities to engage and solve problems if they want to reap the full benefits of the social media revolution.

The longest Facebook reply took 5 days, 4 hours and 36 minutes



7/ CHAT CUSTOMER SERVICE

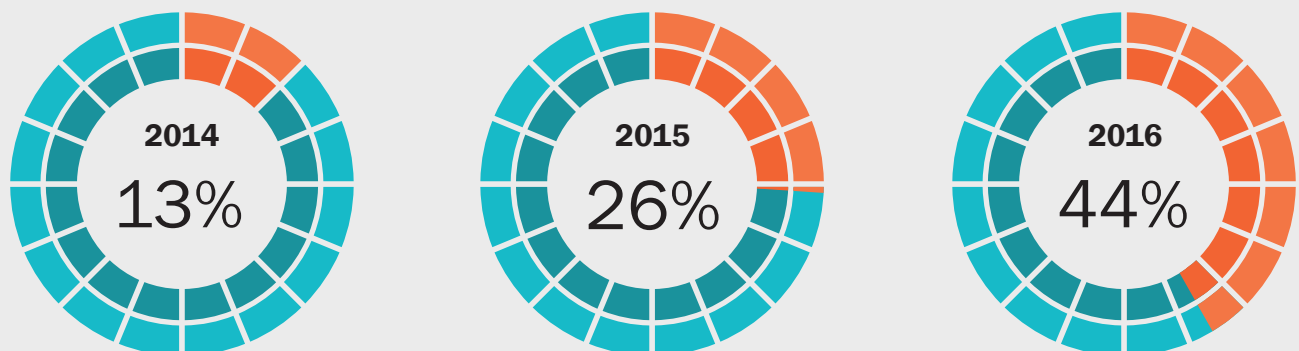
While it has been available for a while, chat is becoming a mainstream channel for customer service. Due to the widespread adoption of technologies such as instant messaging, consumers are increasingly familiar with the concept of text based, real-time conversations, and see the benefits it provides in terms of speed, accessibility and the ability to provide secure, personalised answers. No wonder that usage is growing, along with satisfaction rates. 73% of consumers in a 2015 study from eDigitalResearch rated chat highest for satisfaction, with 67% saying it was easy to use¹.



Chat also brings major benefits to businesses. A single agent can handle multiple chat sessions at once, boosting productivity compared to the telephone, while keeping quality and customer satisfaction high. Chat can also be deployed proactively, with particular events, such as a consumer stalled at the checkout, being used to trigger an agent to offer assistance.

Over the past three years the use of chat has grown in the UK brands. Back in 2014, 13% of companies claimed to offer it, and in 2015 this doubled to 26%. In 2016 it again grew exponentially, to 44% of brands surveyed.

Increasing Chat Adoption



However, it is still being starved of resource. Out of the 44 companies that claimed to offer it, just 16 had it available when tested. It seems that when under pressure, chat is the first channel to be switched off, with companies treating it as a bonus, rather than embracing its benefits. This is short-sighted, given the fact that it can relieve pressure on other channels such as the phone, and also risks annoying customers who increasingly expect to be able to use chat to make contact.

Chat was still the fastest and most accurate channel when it came to customer service, though both measures have declined year-on-year. The average conversation time of 7 minutes 40 seconds was nearly 30 seconds slower than 2015, which in turn had been nearly double the time taken in 2014.

Slowing down? Average chat times declining year-on-year



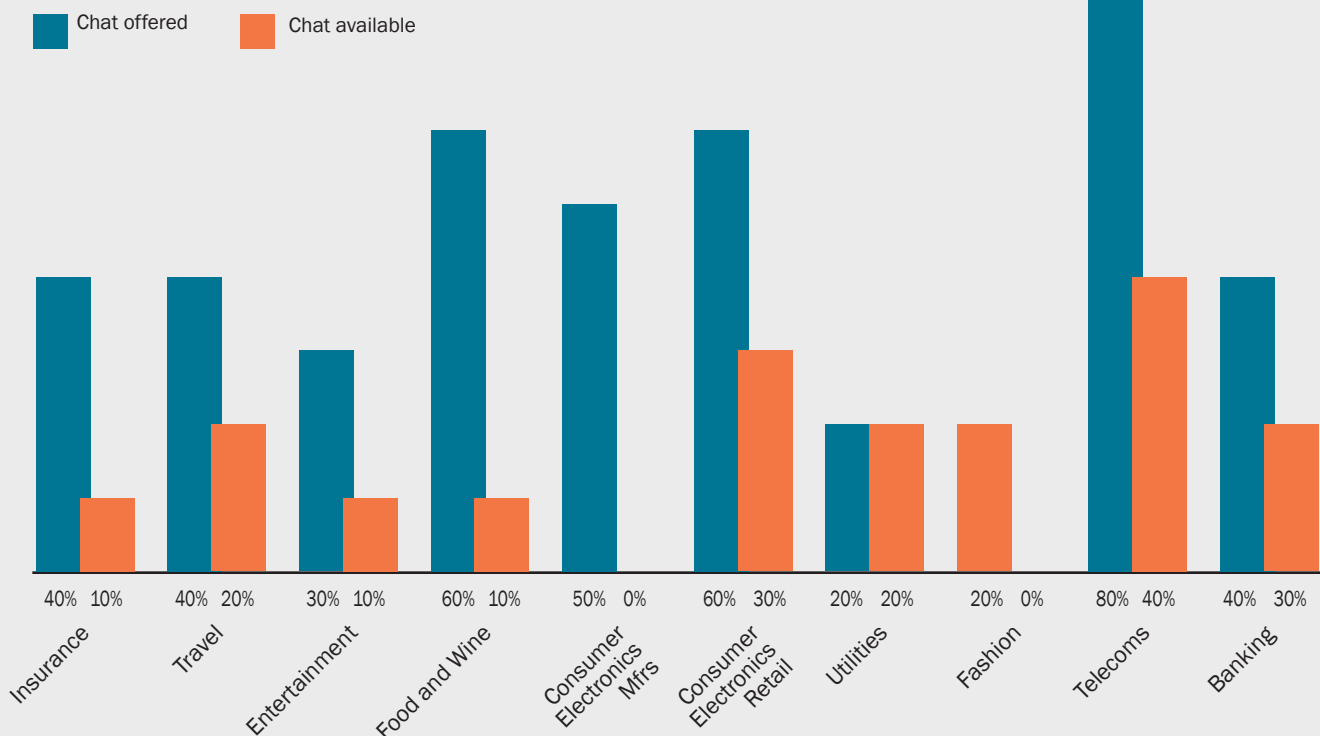
¹ Source eDigital Research: Live chat tops customer service league table thanks to high satisfaction and low customer effort

7/ CHAT CUSTOMER SERVICE

Accuracy and the ability to resolve a query first time were also in decline. Just 75% of those with chat were able to answer a query successfully, with 25% asking consumers to call or email to get a response.

As in 2015, telecoms providers proved strongest on the channel – 40% had chat operational when evaluated, although 80% claimed they offered it. In contrast no fashion retailers or electronics manufacturers had chat available at all when tested.

2016 Chat Adoption and Availability



Companies seem to paying lip service to chat, ignoring the benefits it provides and often switching it off or reserving its use for existing customers. This is partly due to the fact that chat technology is relatively simple to add to a website but resources are required at the operational level to ensure that brands have sufficient, trained agents available to meet customer requirements. As the discrepancy between those offering chat and those having it active demonstrates, brands must invest more in staffing the channel if they are to gain the benefits of greater engagement and happier customers. Otherwise, it will remain the bridesmaid channel, continuing to be pushed into the background, despite its obvious charms.

Consumers are increasingly keen to chat – brands must ensure that they are embracing the channel before their competitors do.

8/ CONSISTENCY

Alongside accuracy and speed, consistency is the third component of successful customer service. Whatever channel they choose to make contact through, consumers expect to receive the same answer to their query; otherwise they will become confused and frustrated, unclear about the experience you are delivering.

Inconsistency also has a major impact on brands, reducing efficiency and leaving them open to potential reputational damage. In many cases inconsistency is the product of a silo-based organisation, with each department or channel relying on its own knowledge base and not sharing information between them. This translates into poor service but also pushes up costs, as each department pays to maintain its own information, rather than accessing a centralised source. If answers are unclear then customers are likely to make contact again, just to check that their first response they received is correct, further increasing the volume of pending queries.

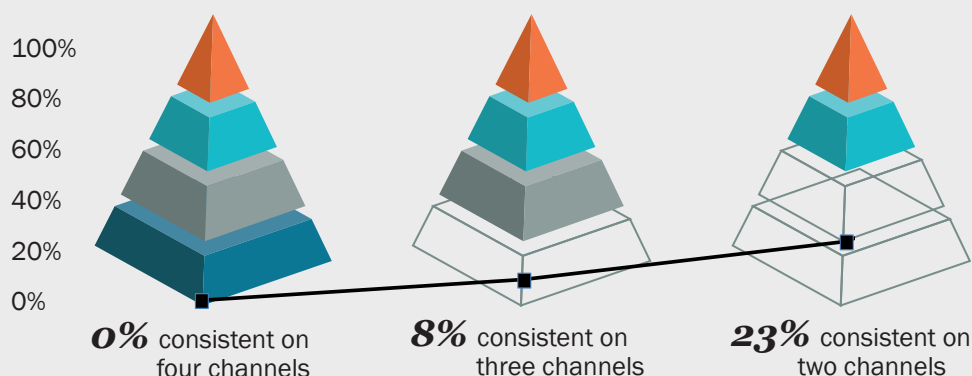
Not enforcing processes, or providing incorrect answers, can leave companies in regulated markets open to fines or legal challenges. Brands need to ensure that agents, and channels such as the web, are meeting regulatory guidelines when it comes to delivering answers with full audit trails in place to show adherence to processes.

To evaluate how good companies are at delivering consistent service across digital channels, the Eptica Multichannel Customer Experience Study asked the same question across the email, chat, Twitter and Facebook channels in order to study the consistency of responses.

CONSISTENTLY INCONSISTENT

Results in 2015 highlighted a complete lack of consistency across channels, with just 11% of companies delivering the same or similar answers through one or more channels. There has been some improvement since then, with 23% of companies consistent across two channels, and a further 8% proving consistent across three channels.

However, this means that the overwhelming majority (69% of companies) failed to provide any consistent answers across more than one answer. This was either because they simply responded on one or zero channels or that their answers completely failed to match. Bearing in mind that these were basic, routine questions that were neither complex nor required personalised answers this lack of consistency is worrying both for consumers and for the efficiency of company customer service.

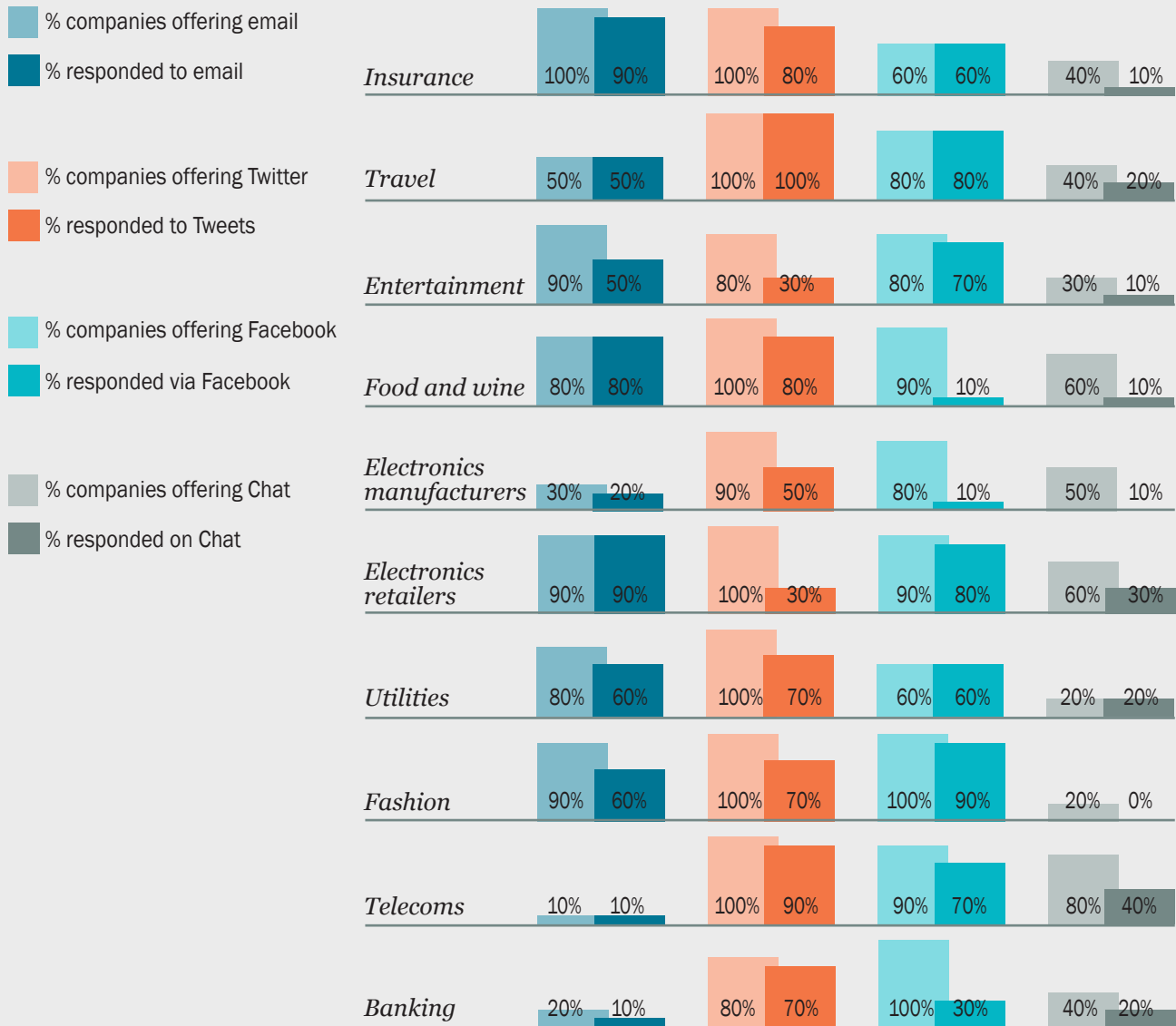


Only one company answered on all four channels (email, chat, Twitter and Facebook) but then gave two sets of responses, both answering the question but giving different replies. Responses on social media matched, but those on email and chat were inconsistent, showing a silo between Twitter/Facebook and email/chat. The least consistent sector was food and drink, where no companies provided matching answers. In contrast 30% of insurers and fashion retailers delivered consistent answers on three channels.

8/ CONSISTENCY

UNI-CHANNEL NOT MULTICHANNEL

Companies seem to be picking and choosing which channels to support, based on internal resources, rather than customer need. An astonishing 22% of companies failed to answer on any channel at all across email, chat, Twitter and Facebook (up from 15% in 2015), and just 18% answered accurately on one channel. Only 16 companies were able to deliver a response on three channels, despite the vast majority claiming to offer them.



Today's consumers want to make contact with brands on the channel of their choice, and want the opportunity to switch between channels during the course of a single interaction. These needs are simply not being met and companies seem to be trying to dictate how they can be contacted, such as by switching off email and chat or failing to respond on Facebook. This is short-sighted, not only will consumers move to more helpful rivals but adopting a channel-by-channel approach adds to costs and reduces efficiency.

Companies need to adopt a unified approach, break down silos and share knowledge across channels if they want to deliver the experience that consumers are demanding.

9/ SECTOR COMPARISON

INSURANCE

Despite the fact that most consumers now use digital channels to research and buy insurance, the Study shows that the industry has not embraced the new multichannel world. Insurance improved slightly when it came to providing answers online (from 40% in 2015 to 44% this year), but was still way behind others. The best insurer on the web (with 6.5 out of 10), scored less than the worst fashion retailer (7 out of 10), showing the gulf in performance.

Email continued to improve however, with 80% of companies providing an accurate answer on the channel, putting it top of the table. Speed suffered however, moving to an average of 28 hours 4 minutes, with response times varying from 49 minutes to over 5 days.

On social media it appears that processes are broken. 100% of insurers were on Twitter, but only 80% responded and then just 50% answered correctly. Facebook was worse, with just 60% responding and 40% answering correctly. One insurer answered on all four channels (email, Twitter, Facebook and email), but then gave two sets of answers, pointing to silos within customer service. A focus on email at the expense of other channels means the sector has much to do to become multichannel.

Web questions answered



6.5/10 questions answered online
(Two companies) - Highest score



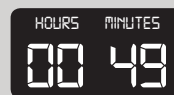
2/10 questions answered online
(One company) - Lowest score

Successful email

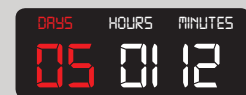


8/10 companies successfully
responded to email

Fastest response



Slowest response



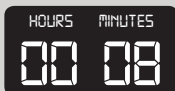
Twitter



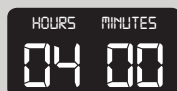
5/10 companies
successfully responded
on Twitter

Response Times:

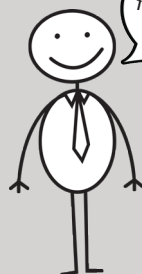
Fastest



Slowest



Chat



One company
made chat available,
with 50% success

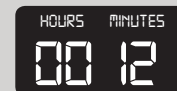
Facebook



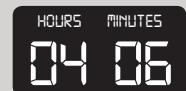
4/10 companies
successfully responded
on Facebook

Response Times:

Fastest



Slowest



Companies surveyed: (Alphabetical)

Admiral / Aviva / Axa / Churchill / Esure /
Legal & General / Liverpool Victoria / More
Than / NFU Mutual / Zurich



9/ SECTOR COMPARISON

TRAVEL

The internet has transformed travel, but both airlines and package operators seem to be struggling to cope with the move to digital. The web saw improvements with 69% of questions answered on company websites, up 10% from 2015, with all scoring between 6-8 out of 10.

On email, the travel sector was poor, with just 30% of companies responding with successful answers, and an average reply time of over 44 hours. The picture of average performance continued on social media, with just 50% of companies responding on Twitter, despite all of them offering the channel. Facebook was similar – 80% offered it, and just 45% gave successful responses. Time to answer social media ranged from the supersonic (3 minutes of an airline) to the pedestrian 37 hours plus of one package operator.

Just 30% of companies were consistent across 2 or more channels, with many companies failing to answer on email, Twitter, Facebook or chat. From flights to holidays, the majority of travel is now booked online, yet the industry does not seem geared up to provide the support consumers are looking for – it needs to focus and invest in customer experience if it is deliver in the future.

Web questions answered



8/10 questions answered online
(Two companies) - Highest score



6/10 questions answered online
(Three companies) - Lowest score

Successful email



3/10 companies successfully
responded to email

Fastest response

HOURS MINUTES
02 49

Slowest response

DAYS HOURS MINUTES
04 01 55

Twitter



5/10 companies
successfully responded
on Twitter

Response Times:

Fastest

HOURS MINUTES
00 03

Slowest

HOURS MINUTES
11 49

Chat



Two company
made chat available,
with 50% success

Facebook



4.5/10 companies
successfully responded
on Facebook

Response Times:

Fastest

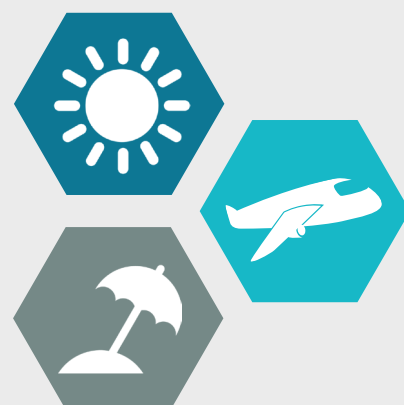
HOURS MINUTES
00 17

Slowest

HOURS MINUTES
37 41

Companies surveyed: (Alphabetical)

British Airways / easyJet / Flybe / Hays
Travel / Jet2 / Monarch / Ryanair /
Thomas Cook / Thomson / Virgin Holidays



9/ SECTOR COMPARISON

ENTERTAINMENT

The majority of music, books, films and games are now bought online – yet the customer service of entertainment retailers is not going to win Oscars or Grammys anytime soon. Despite the fact that retailers are often selling the same products, few seem to be trying to differentiate themselves on customer service, rather than price. The sector performed worse on the web than in 2015, scoring just 44%, putting it bottom of all ten industries surveyed. One company scored couldn't fully answer any questions at all.

Email remained static at 40%, with no improvement in accuracy since 2015, though response times slowed considerably, to over 50 hours on average – hardly helpful in the on-demand, instant download economy.

There were marked differences between Twitter, which performed poorly, and Facebook, where entertainment retailers successfully responded to 70% of questions. In contrast just 30% replied correctly on Twitter. Showing the lack of joined up thinking one company took 152 hours to reply to a question on email, 4 hours 9 minutes on Twitter and 6 minutes to answer the same query on Facebook. Another took 17 minutes on chat to respond – and then recommended phoning instead. Entertainment retailers that fail to sort out customer service are likely to face a struggle to survive in such a competitive environment.

Web questions answered



7/10 questions answered online
(One company) - Highest score



0.5/10 questions answered online
(One company) - Lowest score

Successful email



4/10 companies successfully
responded to email

Fastest response



Slowest response



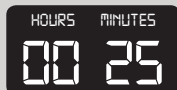
Twitter



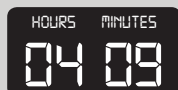
3/10 companies
successfully responded
on Twitter

Response Times:

Fastest



Slowest



Chat



Facebook



7/10 companies
successfully responded
on Facebook

Response Times:

Fastest



Slowest



Companies surveyed: (Alphabetical)

Amazon / Apple iTunes / Google Play /
HMV / Rakuten / Tesco / The Book People
/ Waterstones / WH Smith / Zavvi



9/ SECTOR COMPARISON

FOOD RETAIL

It may have taken some time to become mainstream, but consumers are now happy to buy food and drink online, whether it is their weekly shop or for specialist items such as wine or chocolates. However food retailers seem to be adopting a pick and mix approach to customer service, focusing on certain channels at the expense of others. For example, on the web the sector scored an average of 69% of questions answered, but individual retailers ranged from 90% down to 40%.

Email remained static, with 60% of companies successfully answering, although average response times increased by four hours to over 26. One grocer took over 68 hours to reply to an email about delivery dates, and then failed to give a useful answer.

Social media seems to be under intense pressure. While 90% of food retailers had a Facebook page, just one responded to a question asked on it – and this was unhelpful. Twitter was better, with 80% of companies answering, but just 60% managing to do this successfully. Six retailers claimed to offer web chat, but just one had it working when tested, although they did provide a comprehensive answer. To engage with consumers online, food retailers need to invest more in customer service and deliver across every channel, not just in-store.

Web questions answered



9/10 questions answered online
(Two companies) - Highest score



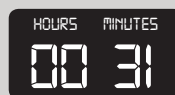
4/10 questions answered online
(Three company) - Lowest score

Successful email



6/10 companies successfully
responded to email

Fastest response



Slowest response



Twitter



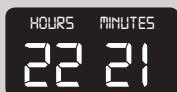
6/10 companies
successfully responded
on Twitter

Response Times:

Fastest



Slowest



Chat



Facebook



0/10 companies
successfully responded
on Facebook

Companies surveyed: (Alphabetical)

Asda / Hotel Chocolat / Laithwaites /
Majestic Wines / Morrisons / Ocado /
Sainsbury / Tesco / Thorntons / Waitrose



9/ SECTOR COMPARISON

ELECTRONICS MANUFACTURERS

Consumer electronics are complex, meaning that potential customers require a great deal of information and reassurance when researching, buying and connecting them. Some companies seem to understand this, yet others are failing to be digital. One company answered 90% of questions online – while another scored just 15%. The overall average dropped by 10% to 57%.

Manufacturers seem to be closing off email– just three provided contact details for this channel, and one of these addresses bounced! Only one company actually replied, and then failed to answer the question, leaving the sector with a score of 0%. Social media scored slightly better. 90% offered Twitter, although just 35% successfully answered, and just one company replied on Facebook, taking over 125 hours to do so.

Chat should be the perfect channel to provide consultative help to consumers, yet while 50% claimed to offer it, none had it working when being tested, pointing to a lack of resources being invested in staffing the channel. Overall, electronics manufacturers languished far behind consumer electronics retailers, meaning that they are likely to be supplanted by their own channel when it comes to providing advice and support.

Web questions answered



9/10 questions answered online
(One company) - Highest score



1.5/10 questions answered online
(One company) - Lowest score

Successful email



0/10 companies successfully
responded to email

One (partial) response time



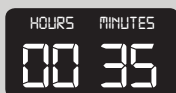
Twitter



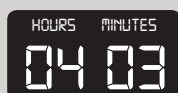
3.5/10 companies
successfully responded
on Twitter

Response Times:

Fastest



Slowest



Chat



Facebook



1/10 companies
successfully responded
on Facebook

Only Response
Time:



Companies surveyed: (Alphabetical)

Apple (iPad) / Dell (Laptop) / HP (laptop)
/ LG (3D TV) / Microsoft (Xbox One) /
Nintendo (Wii U) / Panasonic (3D TV) /
Samsung (3D TV) / Sony (PlayStation 4) /
Toshiba (laptop)



9/ SECTOR COMPARISON

CONSUMER ELECTRONICS RETAILERS

Retailers selling consumer electronics have whole heartedly invested in digital channels, understanding that the only way to engage with customers is to provide detailed information on the products and services that they provide. However performance has dropped slightly since 2015. They improved on the web channel, answering 65% of queries, although individual scores ranged from 90% down to 30%.

Email deteriorated, with 70% of companies successfully responding to questions, down from 80% in 2015. Speed improved, with one company answering in 3 minutes (the fastest of the whole Study). The slowest responded in over 66 hours – still much faster than 2015's 30 days.

Twitter performance also dropped, with just 35% of queries answered, despite 100% companies offering the channel. Average time doubled, showing a channel under pressure and under resourced. Facebook was much stronger, with 75% answering the query correctly, although one company took 113 hours to reply. Electronics retail was another sector that was on paper strong on chat, with 60% of companies claiming to offer it. However, only 30% had it working when tested, the second highest of any sector, with an 83% success rate. Electronics retailers clearly need to integrate service across channels to ensure a more consistent performance moving forward.

Web questions answered



9/10 questions answered online
(One company) - Highest score



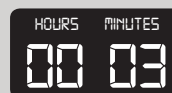
3/10 questions answered online
(One company) - Lowest score

Successful email

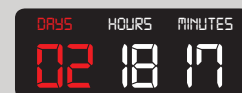


7/10 companies successfully
responded to email

Fastest response



Slowest response



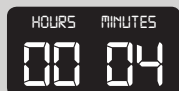
Twitter



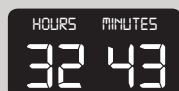
3.5/10 companies
successfully responded
on Twitter

Response Times:

Fastest



Slowest



Chat



Three companies
made chat available,
with 83% success

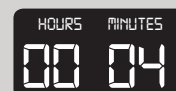
Facebook



7.5/10 companies
successfully responded
on Facebook

Response Times:

Fastest



Slowest



Companies surveyed: (Alphabetical)

Argos / Carphone Warehouse / Currys
/ ebuyer / Euronics / Game / Hughes /
Jessops / John Lewis / Maplin



9/ SECTOR COMPARISON

UTILITIES

Falling prices, rising competition and increased regulation have all driven change in how utilities operate. Customer service provides an opportunity to differentiate, but many utilities are trapped by legacy systems that make delivering a joined up, multichannel experience difficult.

On the web, the utility sector has made a major step forward since 2015, answering 15% more questions to rise to 81% overall. This was achieved by improvements by the poorest performers – in 2015 1 company scored just 10%. This year the lowest was 50%, and more utilities achieved 100%.

The same improvement did not apply to email, where performance stagnated, with only 30% of companies responding to a simple emailed question, exactly the same as in 2015. Utilities were also the tardiest sector to respond, with an average of over 64 hours, over two and a half times slower than in 2015.

Utilities are also struggling with social media. While 100% offered Twitter, just 40% provided a successful response, taking an average of nearly 19 hours to reply, making them again the slowest sector. Facebook was faster but less accurate, with just 45% of queries answered in an average of 8 hours 10 minutes. Chat improved, with both companies that claimed to offer it having it available when the survey took place, although partial answers led to a success rate of 75%.

Web questions answered



10/10 questions answered online
(Two companies) - Highest score



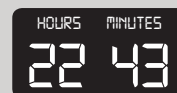
5/10 questions answered online
(One company) - Lowest score

Successful email



3/10 companies successfully
responded to email

Fastest response (partial)



Slowest response



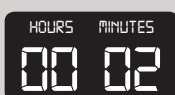
Twitter



4/10 companies
successfully responded
on Twitter

Response Times:

Fastest



Slowest



Chat



Two companies
made chat available,
with 75% success

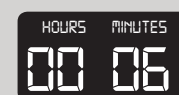
Facebook



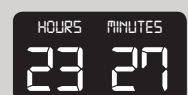
4.5/10 companies
successfully responded
on Facebook

Response Times:

Fastest



Slowest



Companies surveyed: (Alphabetical)

British Gas / Ecotricity / EDF / Eon /
First Utility / Good Energy / nPower / Ovo
Energy / Scottish Power / SSE



9/ SECTOR COMPARISON

FASHION RETAILERS

Since the Eptica Study began, fashion retailers have demonstrated a strong commitment to delivering a superior customer experience. This continued in 2016, with 83.5% of online questions answered, putting the sector just behind banking. No individual company scored under 70%, and three achieved a maximum 100%.

Email was less successful however, remaining static at a 50% success rate, the same as in 2015. This channel was also slower, with an average of over 29 hours, way behind other sectors.

You would expect fashion retailers to be strong on social media, but there were gaps in the service provided. While 90% of companies successfully responded on Facebook, just 60% did on Twitter, despite all companies offering both channels. Reply times ranged from 19 minutes to over 20 hours, showing that more resources need to be added to these channels to meet customer demands. None of the 20% of fashion retailers that claimed to offer chat had it working when tested, closing off a vital channel that can be used to provide advice and help to consumers. Overall, while fashion performed well in many areas, further investment and innovation is needed to deliver a consistent service across every channel.

Web questions answered



10/10 questions answered online
(Three companies) - Highest score



7/10 questions answered online
(Two companies) - Lowest score

Successful email



5/10 companies successfully
responded to email

Fastest response

HOURS MINUTES
05 34

Slowest response

DAYS HOURS MINUTES
03 09 30

Twitter



6/10 companies
successfully responded
on Twitter

Response Times:

Fastest

HOURS MINUTES
02 05

Slowest

HOURS MINUTES
11 34

Chat



No companies
made chat available

Facebook



9/10 companies
successfully responded
on Facebook

Response Times:

Fastest

HOURS MINUTES
00 19

Slowest

HOURS MINUTES
20 26

Companies surveyed: (Alphabetical)

ASOS / Debenhams / House of Fraser /
Marks & Spencer / Monsoon Accessorise /
New Look / Next / River Island / The White
Company / Top Shop



9/ SECTOR COMPARISON

TELECOMS

The telecoms market is competitive and complex, with multiple players offering a range of services and a growing consolidation amongst operators. The sheer number of things that can go wrong, from handsets to phone lines, and the difficulty of fixing them has previously given the sector a poor reputation for customer service.

Telecoms providers seem to be focused on a small number of channels, with others (such as email) closed off to non-customers. While 61% of questions were answered online, just one company provided email details, though it did answer the query successfully in just over 30 minutes.

The sector was strong on social media, topping the table on Twitter, where 75% of queries were answered successfully, although response times ranged from 21 minutes to nearly 24 hours. 90% of telecoms operators were on Facebook, and 60% gave an accurate reply to the query. Showing a lack of joined up thinking the fastest company on email was slowest on Facebook.

Often telecoms companies aim to move consumers to the telephone sales channel, meaning that chat, which offers similar opportunities to engage, explain and sign up customers should be a vital part of their armoury. Therefore it was disappointing to find that while 80% claimed to have chat, just 40% had it working, even if this made it the top sector in terms of availability. 87.5% of chat questions were answered satisfactorily.

Web questions answered



8/10 questions answered online
(One company) - Highest score



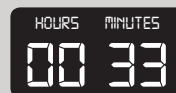
4.5/10 questions answered online
(Two companies) - Lowest score

Successful email



1/10 companies successfully
responded to email

Only response time



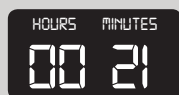
Twitter



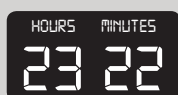
7.5/10 companies
successfully responded
on Twitter

Response Times:

Fastest



Slowest



Chat



Four companies
made chat available,
with 87.5% success

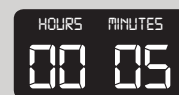
Facebook



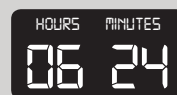
6/10 companies
successfully responded
on Facebook

Response Times:

Fastest



Slowest



Companies surveyed: (Alphabetical)

BT / EE / GiffGaff / O2 / Sky / Talk Talk /
Tesco Telecom / Three / Virgin Mobile /
Vodafone



9/ SECTOR COMPARISON

BANKING

Banking customer service seems to be marking time since 2015, with few steps forward and minor drops in performance. At a time when competition is increasing, this is dangerous for laggards who will find themselves facing rivals that offer a better experience.

While performance on the web continued to be the highest of any sector, the number of questions answered online fell from 91% to 84%, despite four banks scoring a perfect 10. Email remained poor. As in 2015 just two banks offered email to non-customers, and only one of these fully answered the question sent to it.

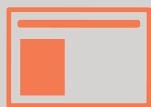
Twitter improved, with 70% of banks responding, of which 50% answered the question, in a blistering average time of just 12 minutes, making it the fastest sector of all. Facebook performance was disastrous however, with just 15% of queries answered – despite all 10 claiming to offer the channel. 70% simply did not respond, and those that did gave partial answers that meant they would have to be re-contacted.

Overall the lack of responses meant that consistency was poor, with just 20% providing matching answers on two channels from email, Twitter, chat and Facebook. Clearly banks need to invest in extending their success on the web to other channels, sharing knowledge and best practice to deliver the multichannel experience that customers demand.

Web questions answered



10/10 questions answered online
(Four companies) - Highest score



6/10 questions answered online
(One company) - Lowest score

Successful email



1/10 companies successfully
responded to email

Only response time

HOURS MINUTES
05 48

Twitter



5/10 companies
successfully responded
on Twitter

Response Times:

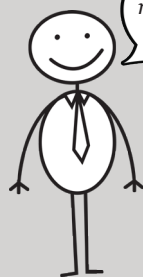
Fastest

HOURS MINUTES
00 04

Slowest

HOURS MINUTES
00 20

Chat



Two companies
made chat available,
with 100% success

Facebook



1.5/10 companies
successfully responded
on Facebook

Response Times:

Fastest

HOURS MINUTES
00 04

Slowest

HOURS MINUTES
00 48

Companies surveyed: (Alphabetical)

Barclays / Co-operative Bank / First Direct
/ Halifax / HSBC / Lloyds / Nationwide /
Natwest / Santander / TSB



10/ CONCLUSION AND TAKEAWAYS

The 2016 Eptica Multichannel Customer Experience Study highlighted the struggle that companies have when trying to deliver joined-up service across multiple channels. Consumers are asking more questions, across more channels and expect faster, consistent responses if they are to remain engaged and loyal.

Some companies are excelling but few are consistent in delivering service across multiple channels. Islands of good practice are surrounded by a sea of poor performance, much of which could be avoided by better structures, training and knowledge. So, how can brands improve? To help, Eptica has pinpointed 10 areas to focus on, based on in-depth analysis of the research and its own experience:

1 DON'T NEGLECT EMAIL

The growing volume of messages that companies receive is contributing to the decline in email performance, as is the difficulty of understanding them and responding in a consistent, timely, manner. Switching off the channel is not the answer, as 72% of consumers say that email is their favoured method of communicating with companies¹. Instead, make sure that you minimise the number of emails you receive by deflecting routine queries through self-service and focus on improving your performance through smart use of technology. For example, Natural Language Processing can help identify the meaning and tone of incoming messages and automatically provide agents with relevant, template-based answers that they can then personalise before sending, boosting productivity.

2 MEET MULTICHANNEL NEEDS

As the Study uncovered, many companies are strong on one channel but weak on others. This points to a silo-based approach which is outdated and inefficient. Break down barriers between departments and unify your approach by sharing resources and knowledge to ensure consistent, fast responses to customer queries. This will not only increase satisfaction, but will also increase efficiency and therefore reduce costs.

3 THINK LIKE A CUSTOMER

When it comes to measuring performance contact centre metrics only provide part of the picture. To better understand the real customer experience try it for yourself by running regular mystery shopper exercises similar to the 2016 Eptica Multichannel Customer Experience Study. By asking the questions that consumers do, across their channels of choice, you can see how you perform and benchmark yourself against competitors and leaders in other industries.

4 KEEP INNOVATING

The customer experience is a journey, not a destination. Consumers continually want better, faster service and if you don't provide it, your competitors will. While it may seem difficult to take a longer term view, you should ensure that you are continually innovating and improving the service you provide. Otherwise you might be overhauled by the competition and deserted by customers who move elsewhere.



¹ Source Marketing Sherpa: Marketing Research Chart: How do customers want to communicate?

10/ CONCLUSION AND TAKEAWAYS

5 PUT KNOWLEDGE AT THE HEART OF THE EXPERIENCE

Good customer service relies on up to date, accurate knowledge. Centralise information in one place to improve efficiency and then share it across every channel, from web self-service systems to agents answering phone calls and email, chat and social media enquiries. Invest in a self-learning knowledgebase that is easy to update with agent and customer feedback to underpin the customer experience, increase productivity, ensure consistency and speed up responses.

6 MAKE IT SIMPLE AND SEAMLESS

Customers want any communication with brands to be straightforward and easy. Make sure you design processes around their needs, value their time, and make it simple to get the information they are looking for. This will boost engagement, loyalty and sales.

7 MAKE IT MOBILE-FIRST

People now spend more time online on their smartphones than their computers and carry them with them everywhere, changing the dynamic of when, and how, they are likely to contact your company. Therefore, ensure that all your channels are mobile-centric, with responsive website design, and adjust support resources so that you can provide fast responses, whenever you are contacted.

8 EMBRACE TECHNOLOGY

Companies can only cope with the rising volume of customer contacts by investing in specialist customer engagement technology to power their operations. Bring channels such as email, chat and social media together into one system to increase efficiency and create a centralised knowledge base to provide fast answers to agents and customers alike. Technology can boost productivity significantly and enable you to do more with the same resources, dramatically improving overall performance.

9 REAP THE BENEFITS OF CHAT

Chat delivers significant benefits to organisations and their customers. Consumers value its speed and personal, conversational feel, while it can significantly reduce costs by deflecting interactions from higher cost channels such as the telephone. While more companies claim to offer it than a year ago, it is too often switched off due to shortages of agents, frustrating consumers and pushing them onto other channels. Invest in chat and ensure it is staffed properly and it will significantly benefit the customer experience.

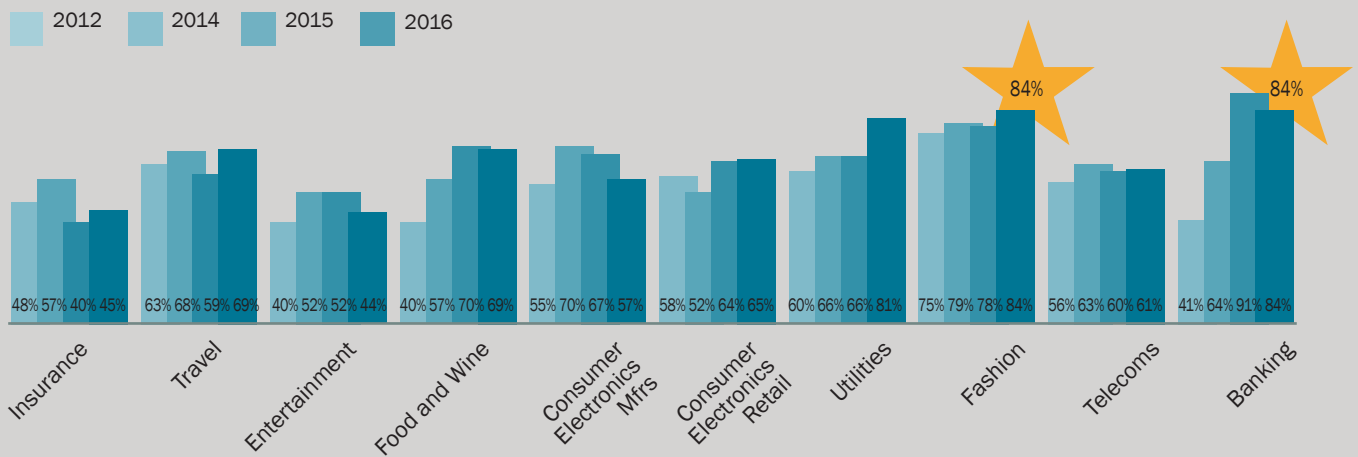
10 LEARN FROM YOUR CUSTOMERS

Customer service provides the opportunity to gather real insight into what consumers want. What questions are they asking? On what channel? Analysing these questions provides valuable information that can be used to make more informed decisions. Use technology such as linguistics to analyse the context and tone of queries to see what can be improved to benefit the customer experience moving forward.

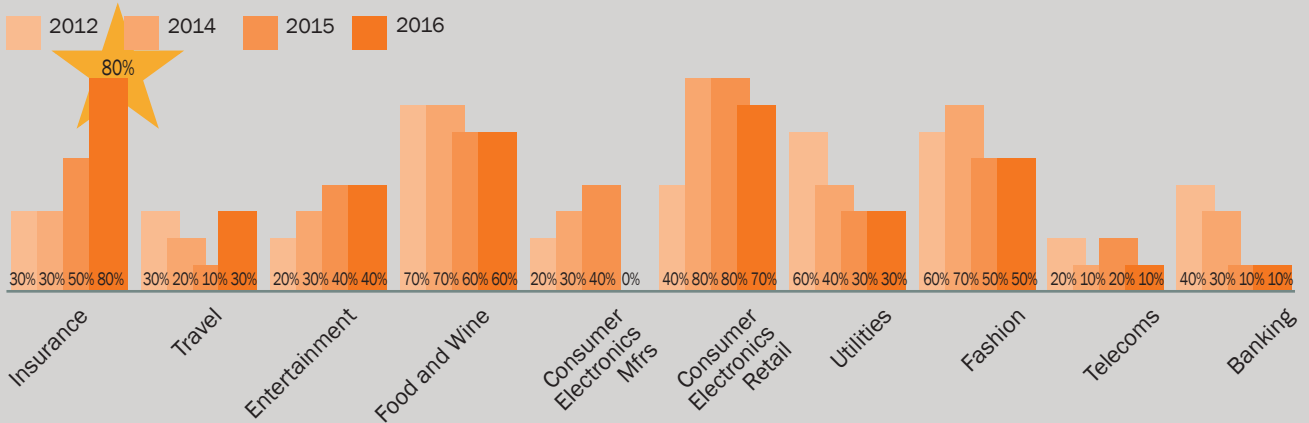


10/ CONCLUSION AND TAKEAWAYS

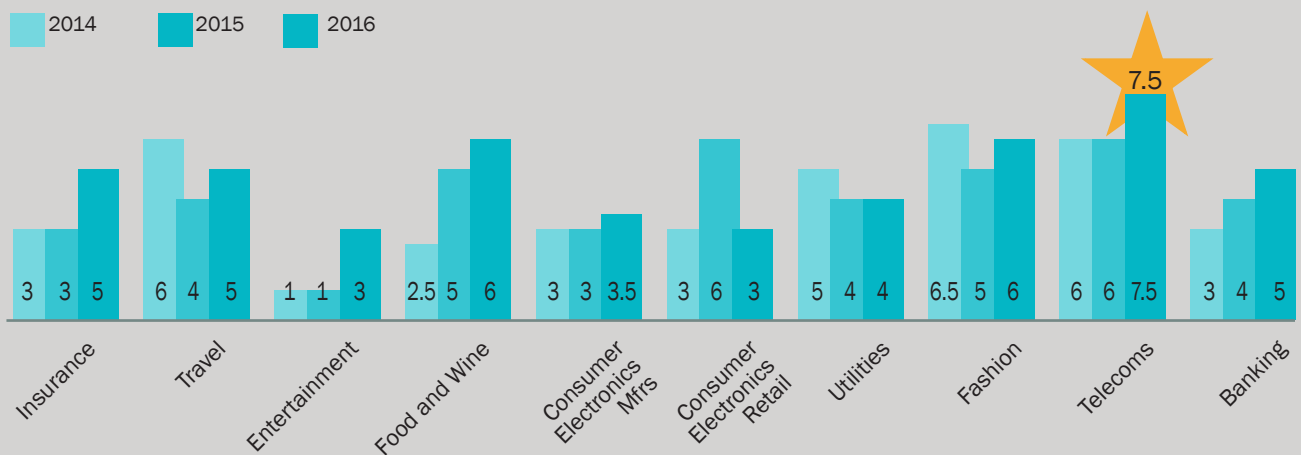
Web performance by sector



Email: Successful answers



Twitter response rates for successful answers (out of 10)



APPENDIX 1: METHODOLOGY

The 2016 Eptica Multichannel Customer Experience Study evaluated the customer service capabilities of 100 leading UK companies in five ways – through the web, email, Twitter, Facebook and chat. The aim was to replicate the actual consumer experience to provide effective, meaningful results across each channel.

WEBSITE

1. Visit each website and look for answers for each of the ten sector-specific questions
2. Use the following order to look for information:
 - Begin with the home page and scan for the answer.
 - Look for the most obvious search box and ask the question.
 - Look for the help/FAQ section and search under this area.
 - Record the answer – score 1 for a complete answer, 0 for not found or ½ for partial answer.
 - Work to a time limit of 2 minutes per question – stop searching when limit reached.

EMAIL

1. Visit each website, search for email option.
2. Email 1 sector-specific question if possible, note down if no email option.
3. Record if auto-response email received.
4. Record if auto-response provides a time frame within which the question will be answered.
5. Record the time taken to respond – was it within the promised timeframe?
6. Did the response answer the question - score 1 for a complete answer, 0 for not found or ½ for partial answer.

SOCIAL MEDIA

1. Visit each website.
2. Record if there is a user forum on the site.
3. Record if there is a link to the company Facebook page.
4. Record if there is a link to the company presence on Twitter.
5. Note down if there is a specific customer service Twitter handle for the company.
6. Record if there is a link from the self-service section of the website to the user forum and/or social media as part of the answering process.

APPENDIX 1: METHODOLOGY

TWITTER

1. Visit each website, see if the company Twitter handle is clearly advertised.
2. Note down if there is a specific customer service Twitter handle for the company.
3. Go to Twitter and tweet the company directly with the sector specific question.
4. Record the time taken to get a response.
5. Did the response answer the query? Score 1 for a complete answer, 0 for not found or $\frac{1}{2}$ for partial answer.
6. Did you have to ask a follow up question? Yes/no.
7. Time the session from first tweet to end.
8. Compare the answer with those received via Facebook, web chat and email. Were they consistent? Score 4 if consistent across all four channels, 3 if consistent across all three channels, 2 for two channels and 0 if all three answers are different.

FACEBOOK

1. Visit each website, see if the company Facebook page is clearly advertised.
2. Note down if there is a specific customer service Facebook page for the company.
3. Go to Facebook and message the company directly with the sector specific question.
4. Record the time taken to get a response.
5. Did the response answer the query? Score 1 for a complete answer, 0 for not found or $\frac{1}{2}$ for partial answer.
6. Did you have to ask a follow up question? Yes/no.
7. Time the session from posting the first message to the end of the interaction.
8. Compare the answer with those received via web chat, Twitter and email. Were they consistent? Score 4 if consistent across all four channels, 3 if consistent across all three channels, 2 for two channels and 0 if all three answers are different.

CHAT

1. Visit each website, search for web chat option.
2. Note down if there is web chat or not.
3. Start chat session and ask sector-specific question.
4. Time the session from initiation of conversation to end.
5. Record whether you were given the option to have the conversation emailed to you. If so, request this.
6. Did the response answer the query? Score 1 for a complete answer, 0 for not found or $\frac{1}{2}$ for partial answer.
7. Compare the web chat answer with those received via Facebook, Twitter and email. Were they consistent? Score 4 if consistent across all four channels, 3 if consistent across all three channels, 2 for two channels and 0 if all three answers are different.

The research across all four channels was carried out in Q4 2015 with companies in the retail sectors, to link to their busiest time of year. Research with the 60 other brands took place in Q1 2016.

APPENDIX 2: SAMPLE QUESTIONS

These are examples of the sector-specific questions asked within the research. Ten questions were asked on each company's website and one single question was asked via each of the email, Twitter, Facebook and chat channels.

INSURANCE

- What is your cancellation policy?
- Do you offer a loyalty discount if I take out more than one type of insurance policy with you?

TRAVEL

- What assistance do you offer for disabled passengers?
- My flight was cancelled. How do I get a refund?

ENTERTAINMENT

- What is the last day I can order to guarantee UK delivery for Christmas?
- Can I amend an order?

FOOD RETAILERS

- Can I add items to an order before it is delivered?
- Can I order online and pick instore?

ELECTRONICS MANUFACTURERS

- If my product is out of guarantee, how do I get it repaired?
- How do I get a replacement manual for my product?

ELECTRONICS RETAILERS

- Can I order online and pick up instore?
- Do you offer finance facilities?

UTILITIES

- How do I get my meter checked?
- How much notice do I need to give you that I am moving home?

FASHION RETAILERS

- Can I return items bought as presents?
- Do you have an ethical sourcing policy? If so where can I find details?

TELECOMS

- Do you have a 24 hour customer service line?
- How do I cancel my contract?

BANKING

- How much do you charge for withdrawals made abroad?
- Who do I need to contact to cancel a direct debit?



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