US CONSUMER SURVEY

Impact of COVID-19 on Digital Customer Service

Sponsored by *eGain*

dimensional research
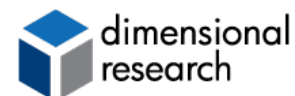
Key findings

COVID-19 has created digital urgency for businesses

- 80% of respondents have increased their use of digital customer service since the onset of COVID-19
- Younger generations are driving digital uptake
  - Gen Z (92%) and Millennials (87%) report that their use of digital customer service has increased

Chatbots ranked last among digital touchpoints in customer satisfaction

- Chatbots rank lowest in level of satisfaction for digital customer service
- 57% of customers complained about getting different answers from chatbots and live agents or across live agents when asking the same question

Majority of customers complained about inconsistent answers across bot and human agents

- Chatbots rank lowest in level of satisfaction for digital customer service
- 57% of customers complained about getting different answers from chatbots and live agents when asking the same question

Younger demographics happier with digital customer service

- Gen Z most likely to report digital customer service has improved (78%)
- Baby Boomers most likely to report digital customer service has gotten worse (39%)

Methodology and participants

Goals and methodology

Research Goal

The primary research goal was to understand the experiences and attitudes of consumers who contacted a business or government agency for digital customer service during the era of COVID-19.

Methodology

Independent sources of consumers were invited to participate in an online survey. Questions were asked about how consumers contacted customer service digitally and their satisfaction during COVID-19. The survey was in field from June 3 – 11, 2020.

Participants

625 Qualified individuals

60 days

A total of 625 qualified individuals completed the survey. All were consumers in the US who contacted digital customer service at one of six target sectors in the past 60 days. This included a mix of ages and education levels.

Digital customer service defined

For this survey, "**digital customer service**" is defined as contacting a company via any of the following online methods

- Chatbot or conversational self-service chat with a bot

- Text chat or video chat with a live agent

- Agent-assisted messaging

- Email

- Social media

- Collaborative web browsing/online form filling

"Digital customer service" includes an interaction with a business or a government entity through one or more of the digital touchpoints mentioned above to get customer service (answer my question, solve my problem, etc.) or advice (how do I improve my credit record, recommend which product or service will fit my needs, etc.).
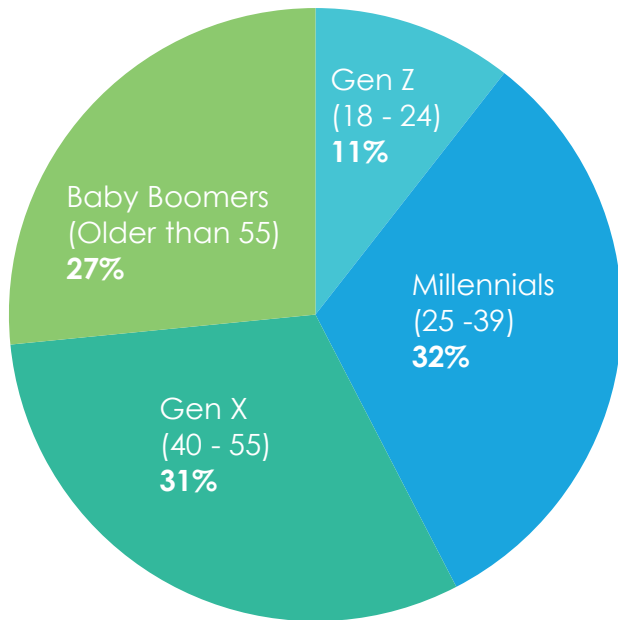
All participants were required to indicate that they read and understood this definition in order to participate
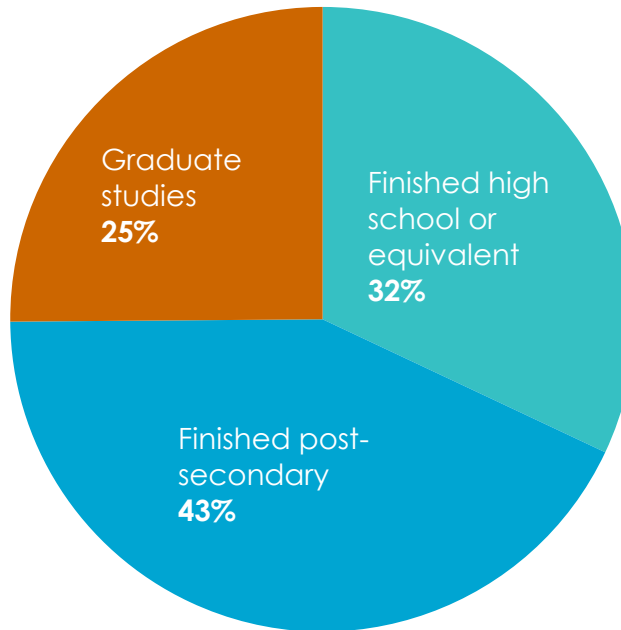
Number of participants per sector

102 | **Government**

103 | **Communications Service Providers**

103 | **Insurance**

104 | **Banks and Credit Unions**

106 | **Healthcare and Health Insurance**

107 | **Retail, including online retail**

Individuals represented

Age

- Gen Z (18 - 24) **11%**
- Millennials (25 - 39) **32%**
- Gen X (40 - 55) **31%**
- Baby Boomers (Older than 55) **27%**

Education

- Graduate studies **25%**
- Finished high school or equivalent **32%**
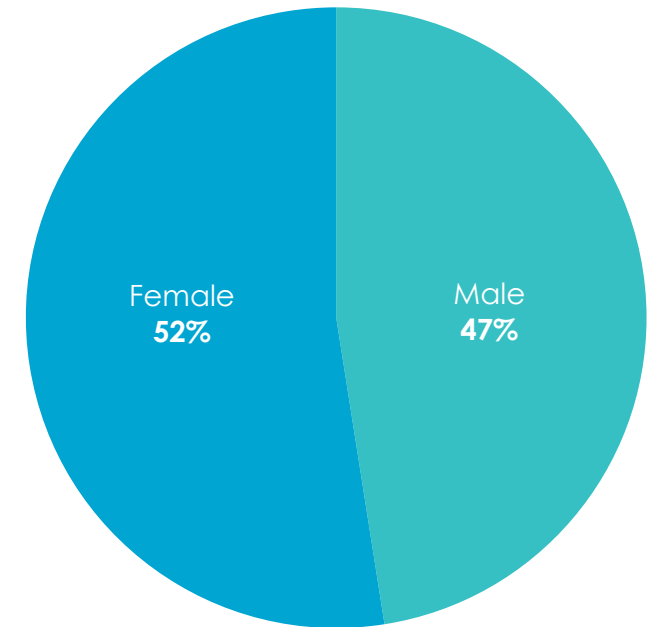- Finished post-secondary **43%**
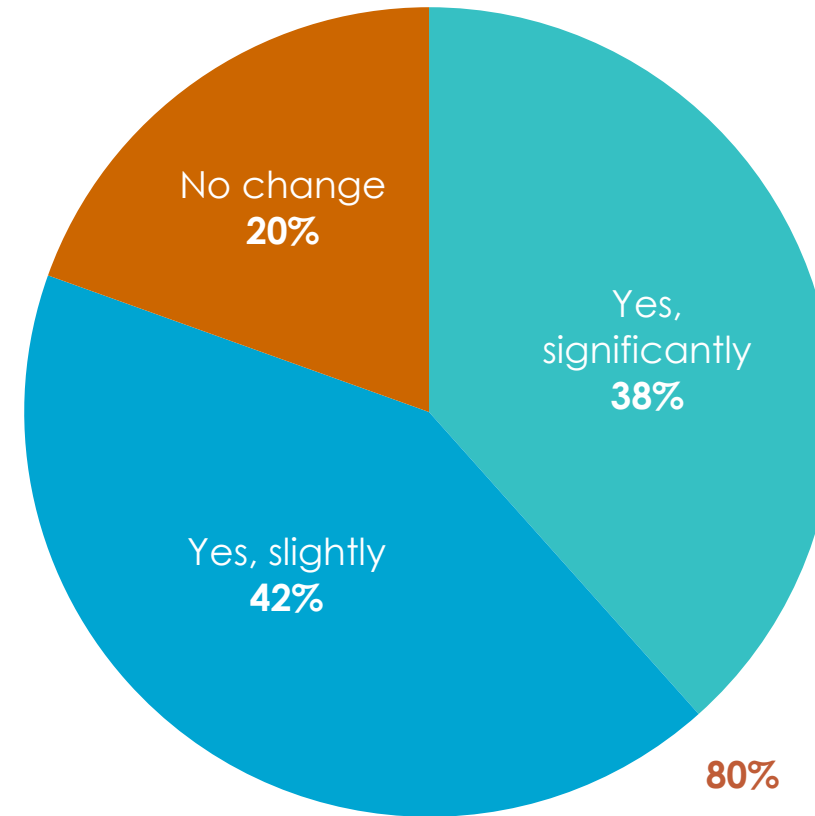
Gender

- Female **52%**
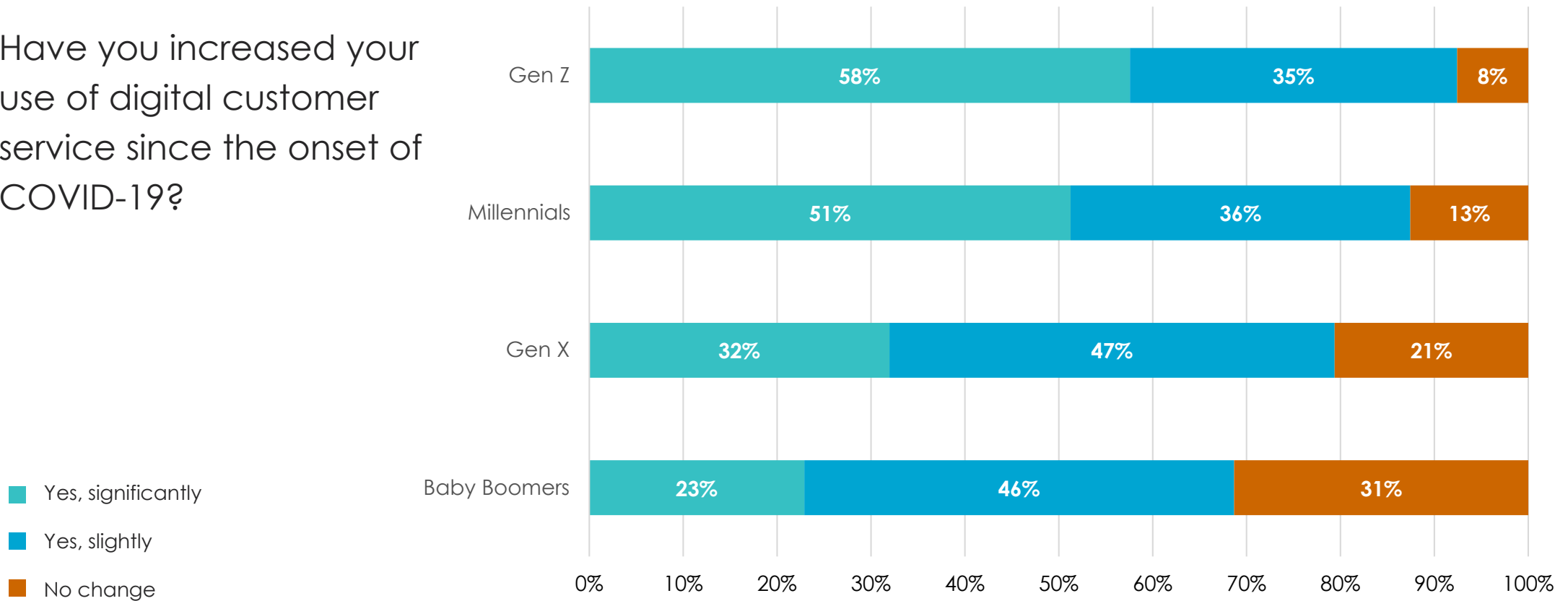- Male **47%**

Key findings

80% have increased digital customer service usage since COVID-19 began

Have you increased your use of digital customer service since the onset of COVID-19?

Pie chart:
- Yes, significantly 38%
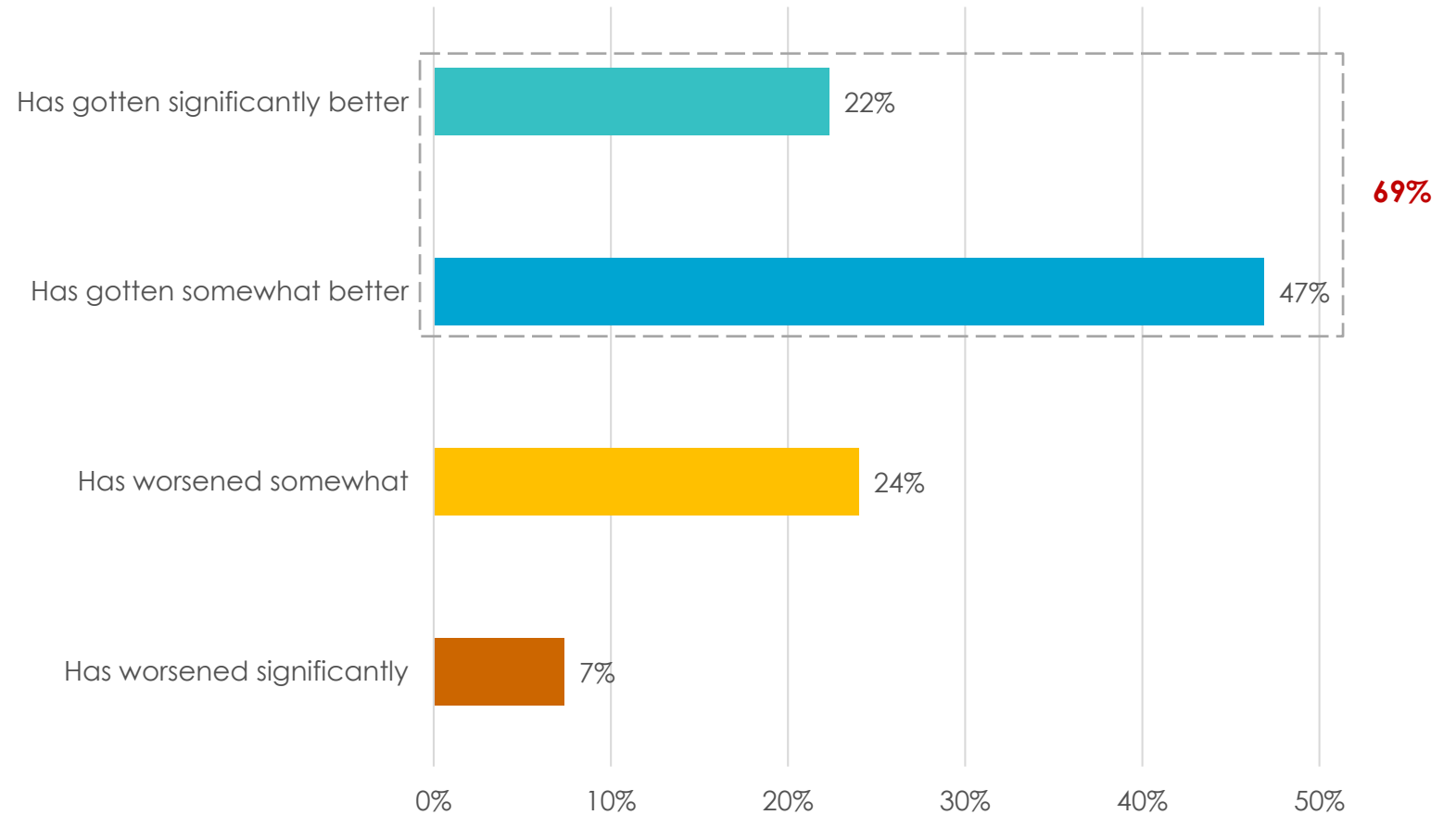- Yes, slightly 42%
- No change 20%
- 80%

Increase in use of digital customer service far higher among younger generations during COVID-19

Have you increased your use of digital customer service since the onset of COVID-19?

	Yes, significantly	Yes, slightly	No change
Gen Z	58%	35%	8%
Millennials	51%	36%	13%
Gen X	32%	47%	21%
Baby Boomers	23%	46%	31%

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

■ Yes, significantly
■ Yes, slightly
■ No change

Most (69%) report digital customer service has improved with COVID-19

In your opinion, how has the state of digital customer service changed since the onset of the COVID-19?

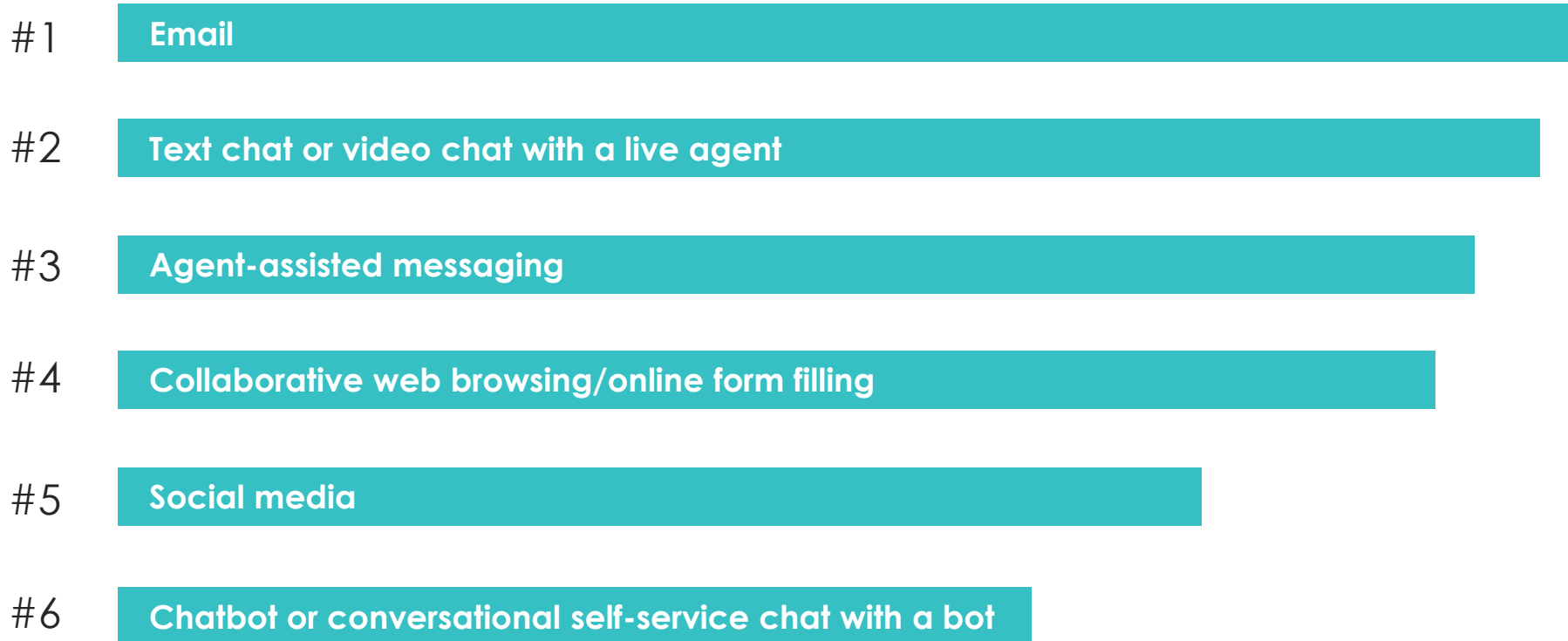|	
Has gotten significantly better	22%
Has gotten somewhat better	47%
Has worsened somewhat	24%
Has worsened significantly	7%

69%

Younger consumers more positive on digital customer service during COVID-19

In your opinion, how has the state of digital customer service changed since the onset of the COVID-19?

Baby Boomers: 16% | 46% | 29% | 10%
Gen X: 20% | 50% | 24% | 6%
Millennials: 27% | 44% | 21% | 8%
Gen Z: 30% | 48% | 18% | 3%

Legend:
- Has gotten significantly better
- Has gotten somewhat better
- Has worsened somewhat
- Has worsened significantly
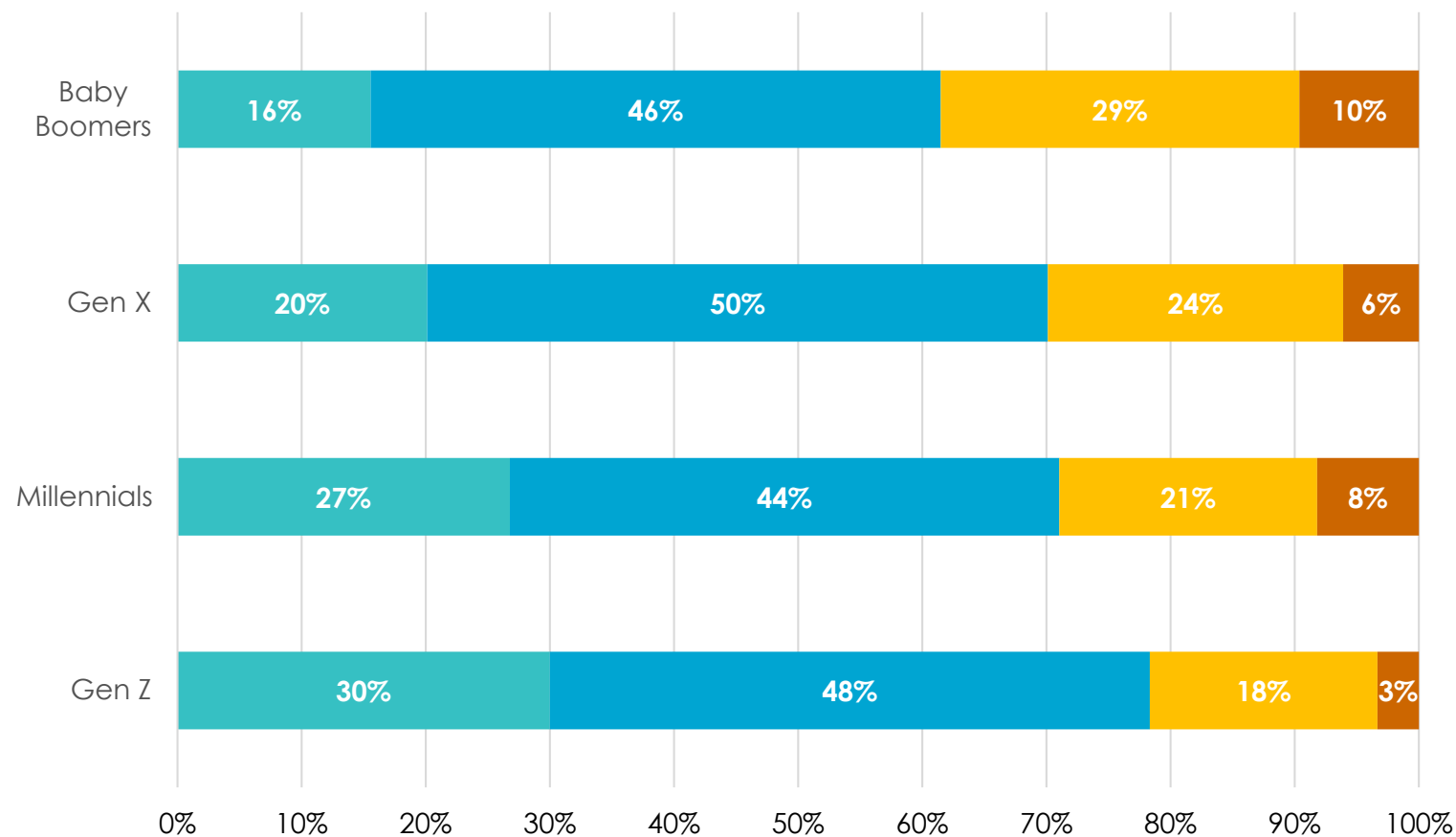
# Chatbots ranked at the bottom in customer satisfaction

How would you rate your satisfaction with customer service at the following touchpoints since the onset of COVID-19?

#1 | Email

#2 | Text chat or video chat with a live agent

#3 | Agent-assisted messaging

#4 | Collaborative web browsing/online form filling

#5 | Social media

#6 | Chatbot or conversational self-service chat with a bot

Majority reported they got different answers for the same question in different touchpoints

In your experience, do you get different answers or information for the same question if you contact a company in different ways?

For example, if you ask different contact center agents or if you ask an agent and then use self-service through a chatbot.

No
43%

Yes
57%
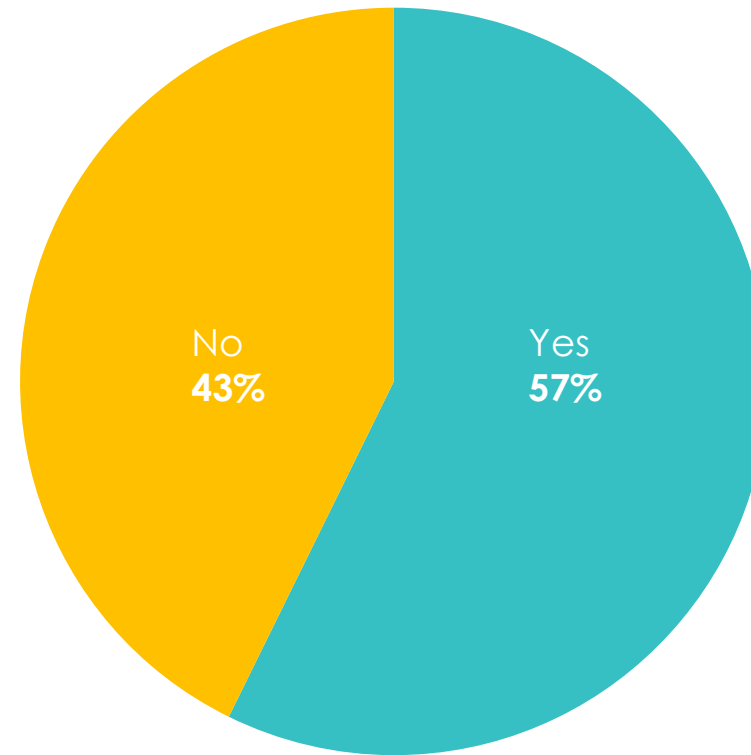
Younger generations are much more likely to report discrepancies in answers

In your experience, do you get different answers or information for the same question if you contact a company in different ways?

For example, if you ask different contact center agents or if you ask an agent and then use self-service through a chatbot.

	Yes	No
Baby Boomers	39%	61%
Gen X	57%	43%
Millennials	70%	30%
Gen Z	65%	35%

■ Yes ■ No
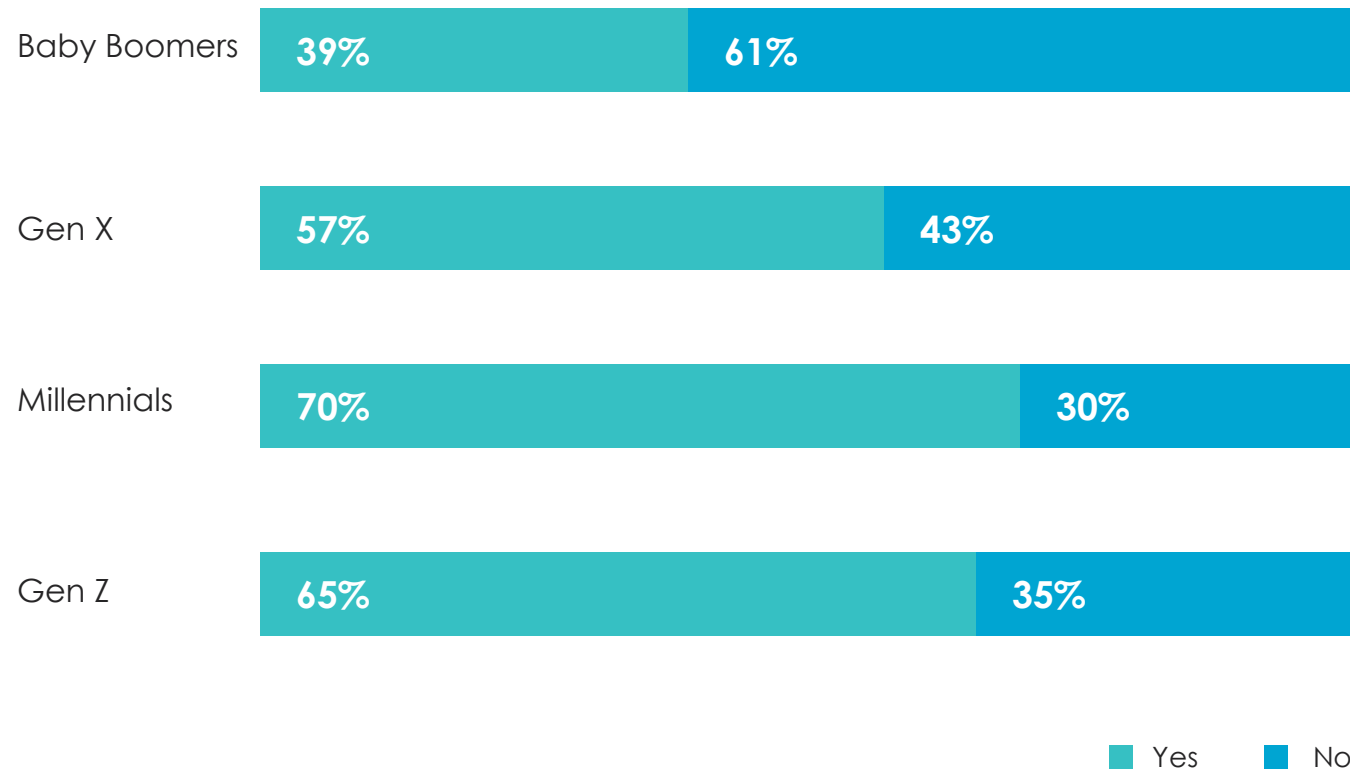
Detailed findings

Digital customer service Performance by sector

More than 100 consumers answered questions for each of the six sectors

For the remainder of this survey, please think only of the **digital customer service** that you have received in the past 60 days from **SECTOR**, which we will refer to as **SECTOR**.

102	**Government**
103	**Communications Service Providers**
103	**Insurance**
104	**Banks and Credit Unions**
106	**Healthcare and Health Insurance**
107	**Retail, including online retail**

Government ranked as the worst; Banks and Retail are ranked as the best for digital customer service

Please rank the following industries on the level of digital customer service that they provide their customers.
Rank from 1 to 6 where 1 = BEST digital customer service and 6 = WORST digital customer service.

#1 | **Bank or Credit Union**

#2 | **Retail, including online retail**

#3 | **Communications Service Provider (Telecom, cable, or internet service provider)**

#4 | **Health Insurance Company or Healthcare Provider (Clinic or hospital)**

#5 | **Property, Casualty, or Life Insurance**

#6 | **Federal or State Government Agencies**

Customer sat with Government sector dropped the most since Covid onset

In your opinion, how has the state of digital customer service changed since the onset of the COVID-19?
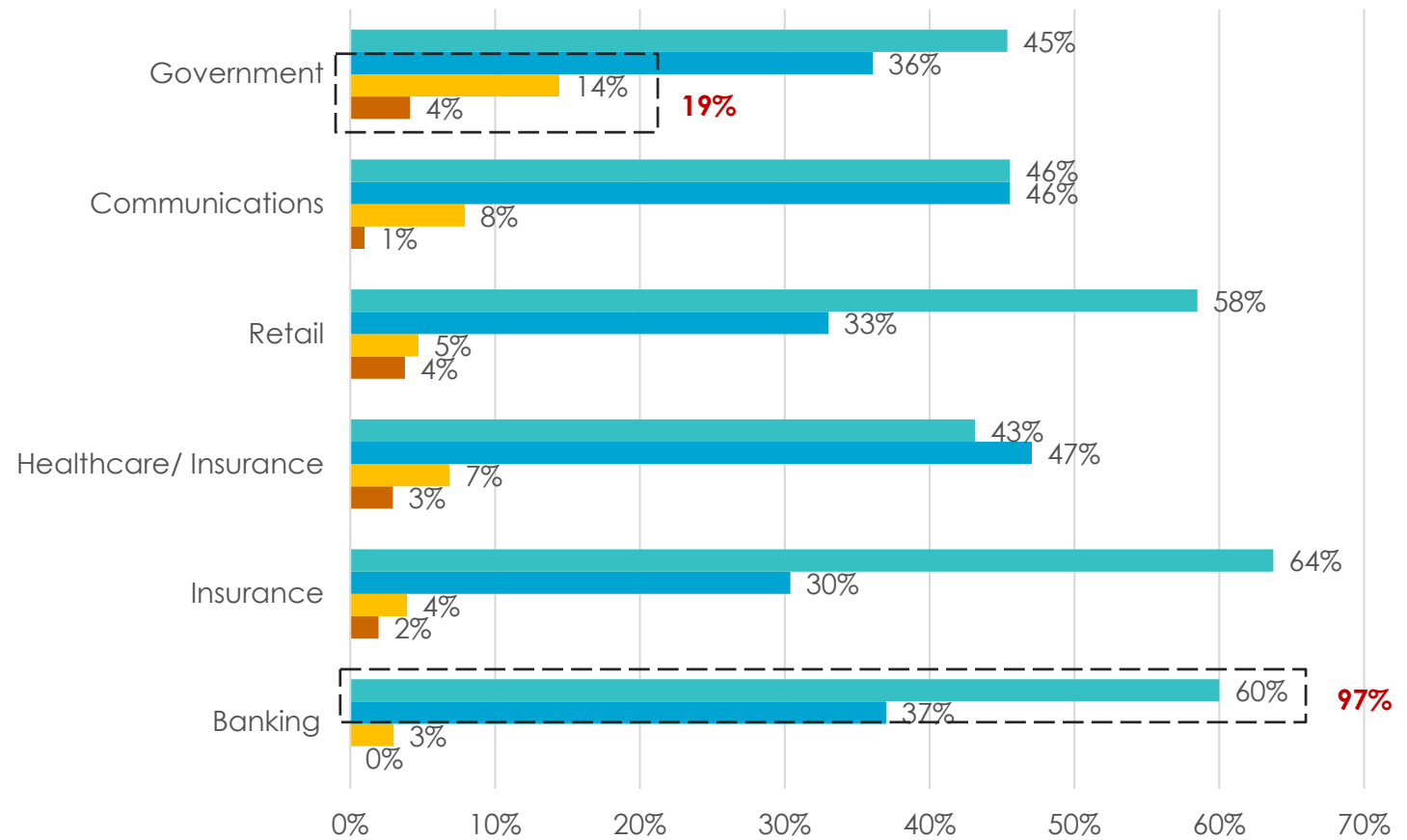
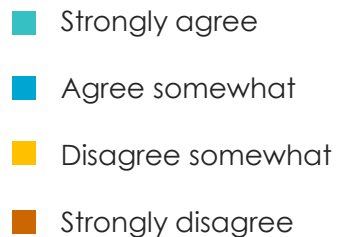|	Has gotten significantly better	Has gotten somewhat better	Has worsened somewhat	Has worsened significantly
Government	15%	33%	39%	13%
Communications	14%	53%	24%	8%
Retail	27%	44%	21%	8%
Healthcare/Insurance	26%	47%	25%	2%
Banking	21%	54%	15%	9%
Insurance	31%	49%	15%	4%

- Has gotten significantly better
- Has gotten somewhat better
- Has worsened somewhat
- Has worsened significantly
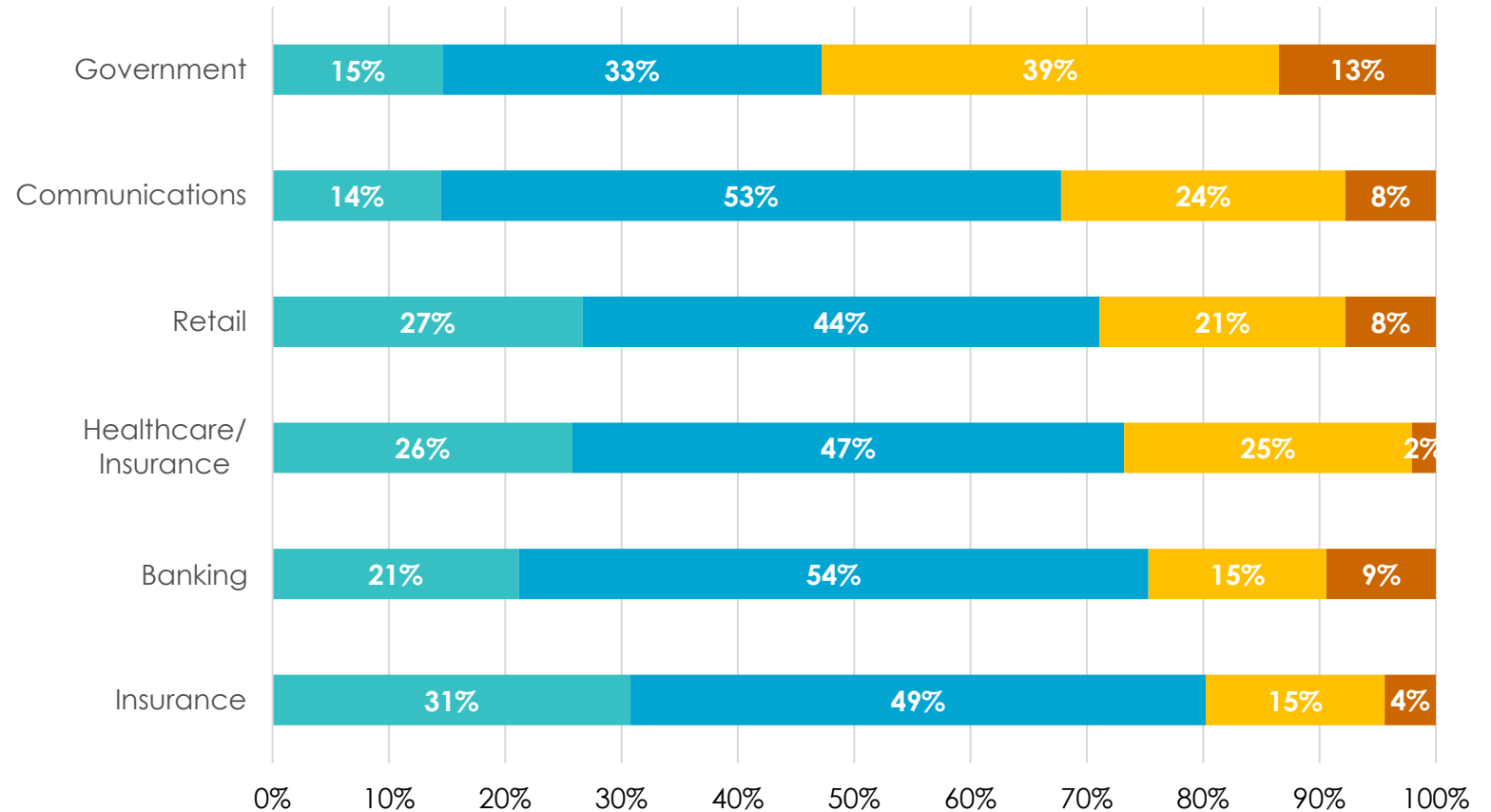
Government least likely to offer preferred digital channel; Banks most likely to offer preferred

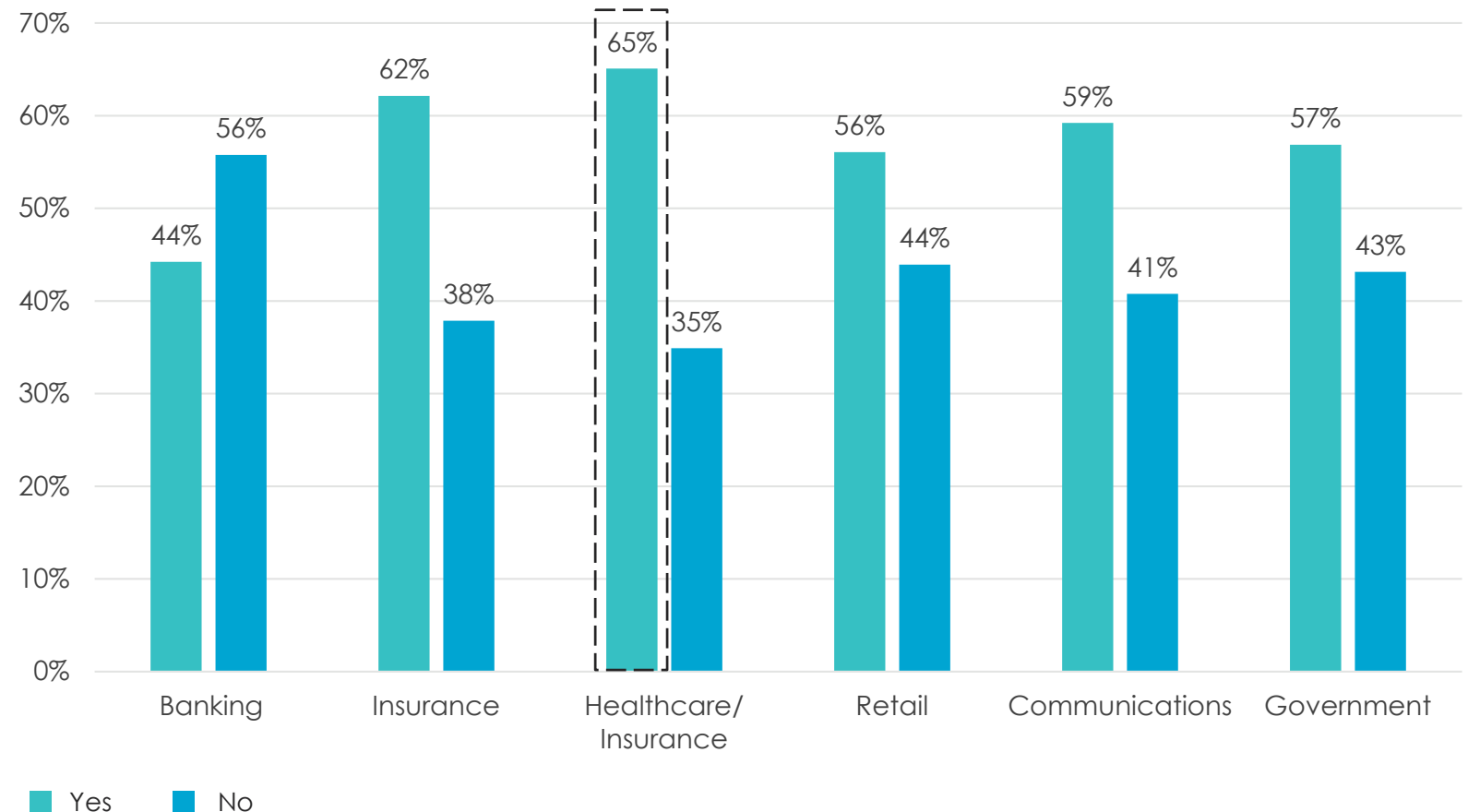**Do you agree or disagree with the following statement**:
SECTOR provided you customer service through the digital channel of your choice.

Legend:
- Strongly agree
- Agree somewhat
- Disagree somewhat
- Strongly disagree

Government: 45%, 36%, 14%, 4% — **19%**
Communications: 46%, 46%, 8%, 1%
Retail: 58%, 33%, 5%, 4%
Healthcare/ Insurance: 43%, 47%, 7%, 3%
Insurance: 64%, 30%, 4%, 2%
Banking: 60%, 37%, 3%, 0% — **97%**

Healthcare/Insurance companies most likely to give different answers via different channels

In your experience, do you get different answers or information for the same question if you contact a company in different ways?

For example, if you ask different contact center agents or if you ask an agent and then use self-service through a chatbot.

Legend:
- ■ Yes
- ■ No

	Banking	Insurance	Healthcare/Insurance	Retail	Communications	Government
Yes	44%	62%	65%	56%	59%	57%
No	56%	38%	35%	44%	41%	43%

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