

The Culture of Service Appreciation in Hong Kong Survey Report 2014

香港的欣賞服務文化

Triple Win for HK Service industry: Service Appreciation Encourages Higher Standards of Service

香港顧客服務業的三贏局面：欣賞服務文化鼓勵更高的服務水準

The *Culture of Service Appreciation in Hong Kong Survey Report 2014* was released in January, 2015 by The Hong Kong Association for Customer Service Excellence (HKACE), the prestigious organisation fostering customer service excellence in Hong Kong, and renowned independent market research company Ipsos.

「香港的欣賞服務文化 2014 調查報告」於2015年一月發表，是次調查由竭力促進香港發展卓越顧客服務的香港優質顧客服務協會與著名獨立市場研究公司益普索共同發表。

The study provides an analysis of key trends of service appreciation in the Customer Service Industry in Hong Kong, surveying over 1,400 customers, employers and employees.

研究訪問超過一千四百名客戶、僱主和僱員，為香港顧客服務業提供欣賞服務文化的趨勢分析。

Customer service experience positive at high levels

顧客體驗高水平的優質服務

83% of Hong Kong consumers say they experienced positive customer service in 2014, similar to the score as previous year (82%), while the proportion of people having a negative customer service experience declined to 38%, against 41% in 2013.

38%受訪顧客表示在2014年曾體驗良好服務，與去年同期報告數字(82%)相約。38%受訪者則曾經歷欠佳的服務，比去年的41%為低。

The score related to the most recent customer service experience is equally encouraging: this experience was above expectations for 51% of surveyed consumers.

近期的客戶服務體驗評分也同樣令人鼓舞：超過五成的受訪者(51%)指服務水準超出預期。

Of those having experienced a positive experience, 92% say they did show appreciation in one way or another, while 79% of people having a negative experience complained.

當中92%曾體驗優質服務的受訪者表示會表揚員工，79%的受訪者則會因服務欠佳而投訴。

HK consumers want to play their part in improving the quality of service in Hong Kong: nearly half (47%) say the reason they give feedback is because they want to specifically encourage and show appreciation for good customer service.

本港消費者希望為提高香港的服務質素出一分力：接近一半(47%)的受訪者表示，他們提供反饋的原因是希望透過讚揚，鼓勵優質服務。





() Figures in 2013 Survey; () 為2013年研究結果

Generational differences: “one size doesn’t fit all”

客戶群的年齡層差異

Nevertheless, results and attitudes towards service appreciation do significantly differ by consumer age groups.

研究結果及消費者對表揚文化的態度在不同年齡組存在顯著差異。

Customers below 25 represent the most participative group of customers, with 52% claiming they want to encourage promotion of service culture (vs. 45% on average). They are quite understandably most likely to share good feedback on the service they received via social media (29% against 20% on average) rather than directly to friends and colleagues (49% against 54% on average). 53% say they would post a complaint for bad service via social media (only 28% average) rather than via other means, and 34% of those who received poor service actually did share this online (against 25% on average). They are also the most likely group to recommend a store or brand to their friends after receiving good service (58% against 51% on average).

二十五歲以下的顧客 為最積極參與的一群， 52%指希望鼓勵表揚文化普及化(與平均45%相比)。29%會透過社交媒體分享他們對服務的正面評價 (與平均20%相比) 而非直接與朋友及同事分享(49%與平均54%相比)。 53%會透過社交媒體表達不滿(與平均只有28%相比)而非其他途徑, 34%曾親身在網上投訴 (與平均25%相比)。58%傾向在接受良好服務後，會推薦店舖或品牌給他們的朋友 (與平均51%相比)。

The 25 to 34 year old group is the most demanding customer group in Hong Kong: only 43% agree that the quality of service they received is beyond expectations (against 51% for the general public).

They are not the most social media savvy group and tend to favor direct human interactions: 63% would choose to share their service experience with friends and colleagues. Still, they are the group most likely to go back to a store again if satisfied (65% against 58% on average), showing that, while they are harder to please, they could offer great return on investment once engaged.

二十五至三十四歲的顧客 對服務要求較其他年齡組別高，只有43%同意他們曾經享有比預期更佳的優質服務 (與平均51%相比)。 他們傾向直接與人分享而非在社交媒體發表：63%選擇與朋友和同事分享他們的服務體驗。 儘管如此，他們是在得到滿意服務後最有可能再次光顧的一群 (65%與平均58%相比)，這表明雖然他們較難以取悅，但提供較高的投資回報。

The 35 to 44 group is the ‘quiet one’; they are least likely to interact with brands to voice their satisfaction or displeasure. Only 38% want to encourage the promotion of the service culture in Hong Kong (against 45% on average) or voice out positive feedback (42% against 49%). When it comes to feedback channels, they are also the least likely to share appreciation via social media or to friends & colleagues. Instead, they would rather talk directly to service staff.

三十五至四十四歲的顧客 為「沉默」的一群。他們較少表達意見及與品牌直接溝通。只有38%希望推動香港的表揚文化(與平均45%相比)或給予正面評價予員工(42%與平均49%相比)。在反饋渠道方面，他們是最少使用社交媒體與朋友和同事分享的組別。相反，他們傾向直接與服務人員反映。

Mr. Simon Tye, Executive Director of Ipsos: “this segment has considerable importance in shaping the morale of staff since they are more likely to interact with them. They represent a crucial population in Hong Kong”

香港益普索執行總監鄭文良先生指：「該年齡組比較樂於與員工溝通，在建立員工士氣為不容忽視的一環。他們亦是香港最重要的人口部分。」

The group over 45 is the most satisfied one; 57% rate the quality of service as beyond expectations (vs. 51% on average), and they are fairly likely to share feedback on the services they receive.

四十五歲或以上的顧客 較多滿意現時的服務， 57%指他們曾經享有比預期更佳的優質服務 (與平均51%相比)，他們亦較多直接表達意見。



Employee and corporate perspectives to further improve the service culture 從企業和員工的角度，進一步提高服務文化

Both employees and companies believe that there are well developed processes in place to collect customer feedback. Top performers in this area would be the retail and the financial industries: 97% of retail employees and 95% of staff working in Financial Services say feedback systems in their organization are well developed. In terms of incentive and motivation means for good services, the majority regard financial incentives and opportunities for promotion as best (80% and 70% respectively).

不同的企業和員工相信現存多種渠道去收集顧客意見，尤其為零售及金融業的強項: 97%的零售業僱員及95%的金融服務業僱員認同他們公司的反饋系統非常完善。大部分受訪者認為金錢獎勵和晉升機會(分別為80%及70%)為最佳誘因增加員工工作動力以致提供更良好的服務。

In addition, 74% of employees in the whole service sector received some form of customer appreciation and 37% believe that the service appreciation culture in Hong Kong has improved in the past year (47% think it is stable, 16% worse).

此外，74%的僱員曾被顧客稱讚，37%認為欣賞文化在過去一年有所改善（47%認為保持穩定，16%認為下降）。

Employers interviewed as part of the study explain they intend to build even more customer-centric organizations and to implement innovative reward systems to encourage their employees to deliver the highest levels of service.

研究中的受訪僱主指，他們希望建立更以客戶為先的形象及推行創新的獎勵制度去鼓勵他們的員工提供最高的服務水平。



The main challenge relates to increased speed in omni-channel and digital environments. The Generation Y use of social media creates new opportunities in terms of interaction with brands but it does add complexity for many companies at this stage.

香港的欣賞服務文化主要挑戰是要提高速度，以配合全方位渠道和數碼化環境的發展。Y世代使用社交媒體與品牌互動，為很多公司創造了新的契機，但同時亦增加了互動的複雜性。

Mr. James Tong, Chairman of HKACE: "This year's survey findings are extremely encouraging, with high customer satisfaction and service appreciation scores. New strategies to engage with different age segments and to accelerate appreciation for great service will allow for improved employee motivation, customer satisfaction and organizational performance"

香港優質顧客服務協會主席唐偉邦先生指：「本年度的調查結果非常令人鼓舞，數字反映更高的客戶滿意度及更普遍的欣賞服務文化。針對不同年齡層的新策略，及使表揚文化普及化，有利於提高員工的積極性，客戶滿意度和企業業績。」

Highlights of the research methodology, analysis and results are available for downloading at HKACE's website. 大家可從香港優質顧客服務協會的網頁下載有關調查的資料收集方法、數據分析及結果之重點。