HKACE Research 2017:
2017香港優質顧客服務協會調查

Digital Transformation of Customer Services in Hong Kong
香港顧客服務的數碼轉型

Research Objectives 調查目的

- The Hong Kong Association for Customer Service Excellence (HKACE) conducted an annual survey to understand the challenges and opportunities of the customer service industry in Hong Kong

- 香港優質顧客服務協會(HKACE)進行一項有關顧客服務的年度調查，藉此了解香港顧客服務行業的挑戰及發展機會 。

- The objectives of this research:

- 是次調查的目的如下：

Understand customers' interest in using customer service via digital channels
了解顧客對現時透過數碼渠道使用顧客服務的興趣

Understand customer service staff opinions towards provision of customer service via digital channels
了解顧客服務人員對透過數碼渠道提供顧客服務的意見

Study the Threats and Opportunities for companies offering digital customer services
研究對提供數碼顧客服務的公司的威脅和機遇

Research Design 調查設計

A total sample of n=858 people participated in this online survey from December 2017 to February 2018
是次調查由2017年12月至2018年2月以網上形式進行，合共訪問了858 位受訪者

Hong Kong Customers
本地顧客
(n=500)

Aged 18-54 who have experienced customer service in Hong Kong in the past 12 months:

年齡介乎18-54歲、在香港過去十二個月內有顧客服務體驗的香港顧客

Customer Service Staff
前線顧客服務員
(n=358)

Customer service staff who are working in the customer service industry in Hong Kong

於香港顧客服務行業工作的前線顧客服務員

Executive Summary 調查摘要

Hong Kong customers are enthusiastic to use more digital services, and they want to get their issues solved promptly and easily
香港的顧客願意使用更多數碼服務，
他們期望能即時及輕鬆地解決他們的問題

There are misalignments between what customers need and what staff think customers need in digital services
顧客在數碼服務上的需要以及顧客服務人員認為顧客的需要並不一致

Customers prefer a seamless customer experience through integrated multiple channels
顧客喜歡透過整合的多渠道體現無縫的顧客體驗

Detailed Findings
調查詳細結果

Key Findings 調查結果

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Key finding 1: Hong Kong customers welcome and love to try using digital channels for customer service
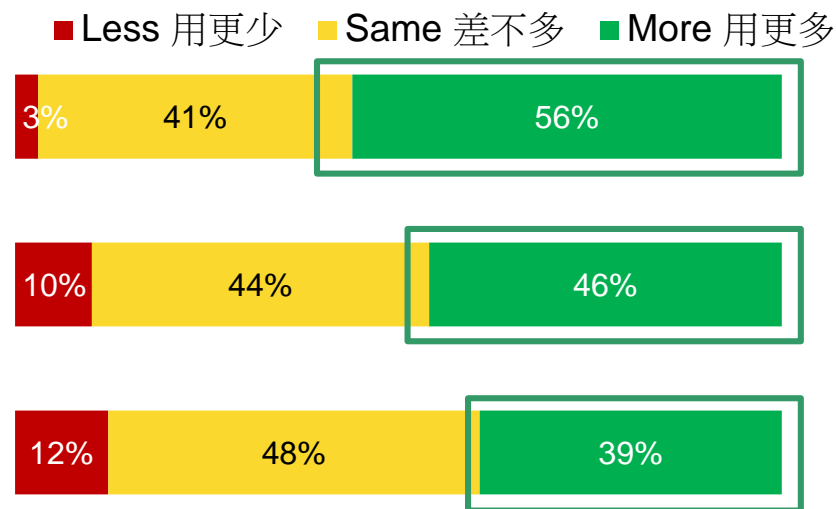
調查結果 1: 香港顧客歡迎且喜愛透過不同數碼渠道使用顧客服務。
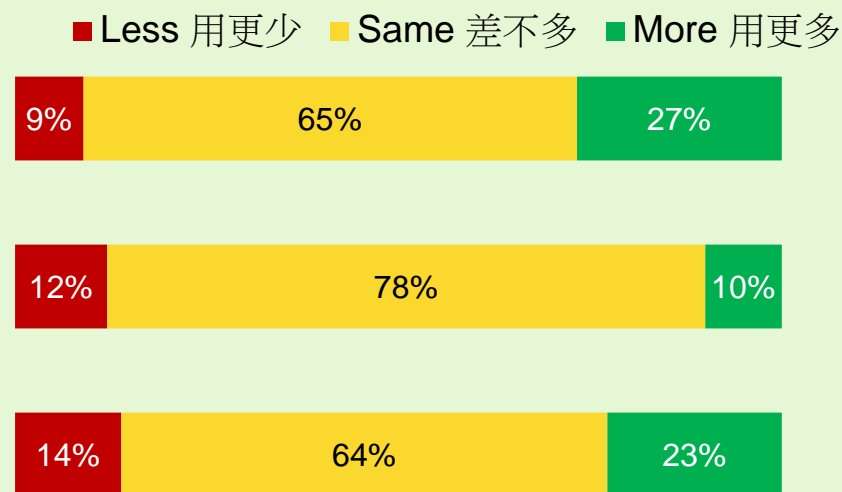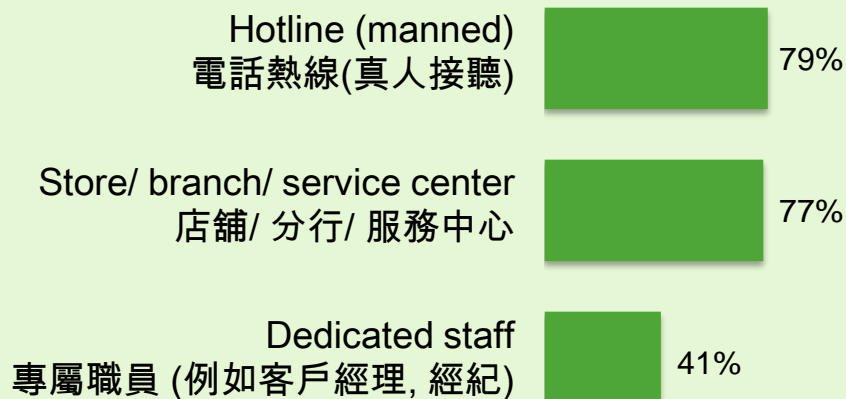
	Past 12 months usage 過去**12**個月的使用	Expected to use in next 3 years 預計在未來**3**年的使用量

Digital channels 數碼渠道

■Less 用更少　■Same 差不多　■More 用更多

Online instant e-chat
網上即時顧客服務 — **36%**
3% | 41% | 56%

Contact specific staff through WhatsApp / WeChat
和個別職員用WhatsApp 或 WeChat 等工具聯絡 — **23%**
10% | 44% | 46%

Leave message on social media
在社交媒體 (例如Facebook) 留言 — **18%**
12% | 48% | 39%

Human-touch channels 全人接觸的渠道

■Less 用更少　■Same 差不多　■More 用更多

Hotline (manned)
電話熱線(真人接聽) — **79%**
9% | 65% | 27%

Store/ branch/ service center
店舖/ 分行/ 服務中心 — **77%**
12% | 78% | 10%

Dedicated staff
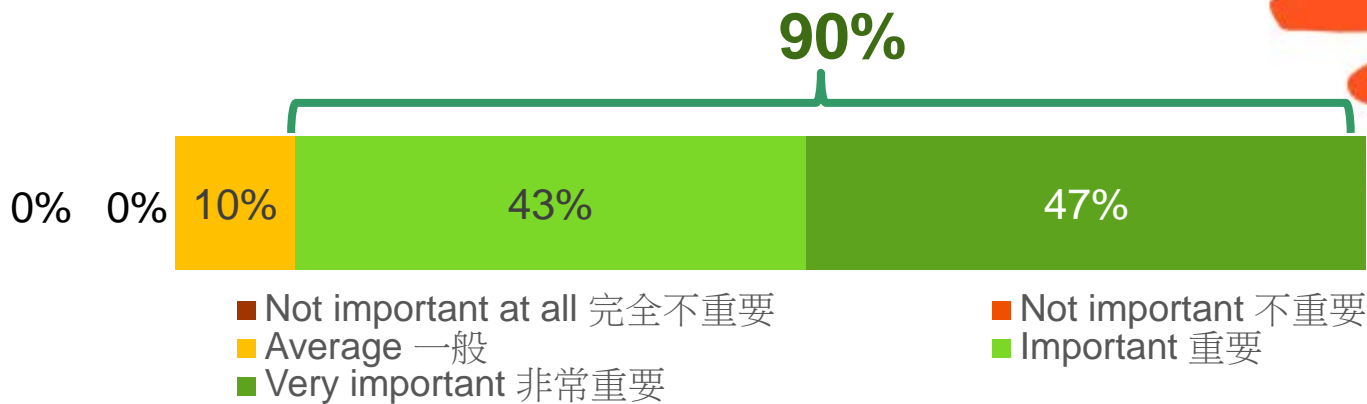專屬職員 (例如客戶經理, 經紀) — **41%**
14% | 64% | 23%

Key finding 1: Hong Kong customers are sophisticated and discerning – they expect their enquiries to be solved the first time they contact the customer service.

調查結果 1: 香港顧客非常精明及高要求- 他們期望他們的查詢可以在第一次接觸顧客服務時就能得到解決。

90% of Hong Kong customers expect their enquiries to be solved the first time they contact the customer service

九成 香港顧客期望他們的查詢可以在第一次接觸顧客服務時就能得到解決

90%

0%	0%	10%	43%	47%

■ Not important at all 完全不重要   ■ Not important 不重要

■ Average 一般   ■ Important 重要

■ Very important 非常重要

Key finding 1: However, customers are less satisfied with digital channels because they are not able to solve their enquiries the first time they contact the customer service.

調查結果 1: 然而，香港顧客對數碼渠道的滿意度較低，因為數碼渠道無法第一時間解決他們的問題。
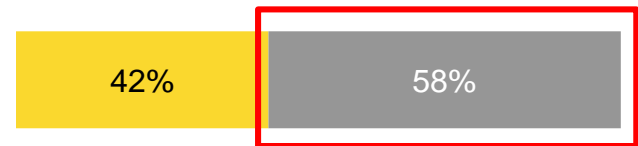
	Very satisfied/ Satisfied 非常滿意/滿意	**Able to solve your enquiry the first time** 在第一次接觸時便能解決問題

Digital channels 數碼渠道

Channel	Very satisfied/ Satisfied	Yes 可以	No 不可以
Company websites/ mobile app 公司的網頁或手機應用程式	64%	42%	58%
Company social media sites 公司社交媒體頁面	56%	42%	58%

■ Yes 可以
■ No 不可以

Human-touch channels 全人接觸的渠道
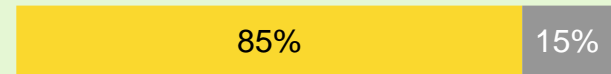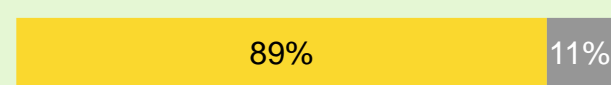
Channel	Very satisfied/ Satisfied	Yes 可以	No 不可以
Dedicated staff 專屬職員 (例如客戶經理, 經紀)	73%	85%	15%
Store/ branch/ Service center 店舖/ 分行/ 服務中心	71%	89%	11%
Hotline (manned) 電話熱線(真人接聽)	64%	74%	26%

■ Yes 可以
■ No 不可以

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What customers need in digital channels:
顧客在數碼渠道上的需要

What staff think customers need in digital channels:
顧客服務人員認為顧客在數碼渠道上的需要：

1st	**Able to solve customers' issues** 能夠解決顧客的問題	**41%**		**1st**	**Efficient service** 高效率的服務	**24%**
2nd	**Efficient service** 高效率的服務	**10%**		**2nd**	**Able to solve customers' issues** 能夠解決顧客的問題	**15%**
3rd	**Able to understand customers' needs/ issues** 能夠瞭解顧客的需要/問題	**9%**		**3rd**	**Able to communicate in simple and clear terms** 能夠簡單及清晰的溝通	**11%**

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Key finding 3: Different customers' needs are best served by different service channels.
調查結果 3: 不同的服務渠道能切合不同的顧客需求。

Tend to go to **Company websites/ mobile app**
傾向瀏覽公司的網頁或手機應用程式

Tend to go to **Store/ Branch/ Service center**
傾向去店舖/ 分行/ 服務中心

Tend to **call hotline**
傾向致電熱線電話

- **Enquiry for basic information (65%)**
  查詢公司基本資訊 **(65%)**

- **Enquiry of product/ services (59%)**
  查詢產品或服務資訊 **(59%)**

- **Bill payment (50%)**
  賬單及支付 **(50%)**

- **Purchase/ apply for products or services (50%)**
  購買或申請產品或服務 **(50%)**

- **Look for solutions to a problem or an issue (51%)**
  解決有關產品或服務的問題 **(51%)**

- **Contract renewal (49%)**
  服務計劃續約 **(49%)**

- **Enquiry of service appointment, delivery (42%)**
  查詢服務預約、產品送貨時間等 **(42%)**

Key finding 3: Customers prefer a seamless customer experience through integrated multiple channels, i.e. Omni-channels.

調查結果 3: 顧客喜歡透過整合的跨渠道體現無縫的顧客體驗。

- As Hong Kong customers are sophisticated and discerning, majority wants services delivered through Omni-channel to meet their different needs.
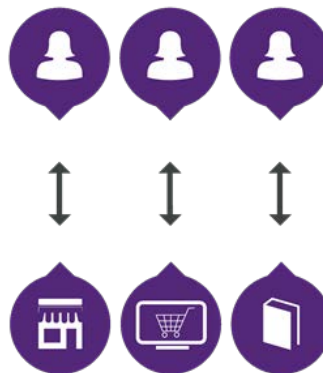- 由於香港顧客非常精明及高要求，大多數人希望透過跨渠道為他們提供服務，滿足他們不同的需求。

Single-channel customer service

– Companies provide one channel for customers

單一渠道顧客服務

— 公司或機構提供一個渠道給顧客

7%

Multiple-channel customers service

– Companies provide multiple channels to customers; however the channels are not connected

多渠道顧客服務

— 公司或機構能提供多於一個渠道給顧客，但各渠道之間並沒有連繫

24%

Omni-channel customers service

– Companies provide multiple channels to customers and the channels are integrated

跨渠道顧客服務

— 公司或機構能提供多於一個渠道給顧客，而且各渠道之間的資訊能互相整合

64%

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Conclusion 總結

Conclusion:

- **Hong Kong customers' expectation on digital services outpace what companies are offering today**

- There are still gaps between digital service and human service.

- When customers cannot solve their issues via digital channels (e.g. websites or social media), they tend to seek human channels with higher expectation.

- While companies continue to improve and innovate their digital services, it is also important to enhance their customer services staff with skills to solve customer issues effectively and efficiently.

總結:

- 香港顧客對數碼服務的期望超於香港公司現在提供的服務水平

- 數碼服務與全人接觸的服務之間仍然存在差距。

- 當顧客不能透過數碼渠道（例如網頁或社交媒體）解決他們的問題時，他們會透過全人接觸服務尋求幫助，而且會有更高的期望。

- 香港公司在不斷改良和創新數碼服務的同時，公司也需要提升前線顧客服務員的技能，以有效及快捷地解決顧客問題。

Recommendation 建議

Recommendation from HKACE:

- We are delighted to see customers welcome digital services. However, we must make sure our digital channels or services create value and convenience to our customers.

- With our theme "i-Service, I Serve", the Association will work with our fellow industry players to provide Hong Kong customers with satisfied customer journey through experience sharing, company visits and research findings sharing.

- While we will advocate the use of digital technologies in customer service, we will continue to emphasize the importance of integrated channels by embedding human touch elements into digital technology, so as to provide a better customer experience to our customers.

香港優質顧客服務協會(HKACE)的建議:

- 我們很高興看到顧客歡迎數碼服務。但是我們必須確保我們的數碼渠道及服務能為我們的顧客創造價值和提供便利。

- 配合本協會的主題「i-Service, I Serve」，本協會將繼續與我們的同業合作，通過經驗分享、公司導賞以及研究結果分享，為香港的顧客提供更滿意的顧客歷程及體驗。

- 我們還將與我們的會員合作，倡導在顧客服務中使用數碼科技，同時強調整合渠道的重要性並將全人接觸的元素嵌入數碼科技中，為我們的顧客提供更佳的顧客體驗。

HKACE

香港優質顧客服務協會