



HKACE 2018

**Digital Transformation of Customer Services
in Hong Kong – Trends & Opportunities**

香港顧客服務的數碼轉型 – 趨勢及機遇

15th May 2019

The background of the central text box features a dark, semi-transparent overlay with various icons representing digital technology and customer service, such as a cloud, Wi-Fi, a shopping cart, a mobile phone, and a lock. The background also shows a blurred image of a customer service representative in a grey uniform interacting with a customer.

HKACE

香港優質顧客服務協會
Hong Kong Association for
Customer Service Excellence

RESEARCH OBJECTIVES

- 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 are:
是次調查的目的如下：

To study how Hong Kong **customers** have adopted to use digital service channels, and to look at what are the drivers behind them to use more in the future
研究香港顧客採用數碼服務渠道的趨勢及驅使他們更多使用的因素

To listen to **customer service staffs** on how the migration towards digital services impacts their work
聆聽客戶服務人員有關邁向數碼服務如何影響他們工作的看法

To explore the opportunities for **companies** to offer better overall customer services, and to formulate strategies using digital channels to create good customer experiences
探索服務機構如何值此機會提供更好的整體客戶服務，並制定策略，利用數碼渠道以創造優質的客戶體驗

RESEARCH DESIGN 調查設計



Online survey 網上調查 –

A total sample of n=800 people participated in this online survey from 12th to 20th December 2018.

是次調查由2018年12月12至20日以網上形式進行，合共訪問了800位受訪者。



Hong Kong Customers

本地顧客

(n=500)

People who have experienced customer service in Hong Kong in the past 12 months.

曾於過去12個月使用過客戶服務的人士。

	2018	2017
Female	54%	54%
Male	46%	46%
	2018	2017
18 to 24	16%	16%
25 to 44	42%	42%
45 to 64	42%	42%



Customer Service Staff

前線顧客服務員

(n=300)

People who are currently working in the customer service industry in Hong Kong.

現於香港從事客戶服務的員工。

	2018	2017
Female	54%	52%
Male	46%	48%
	2018	2017
18 to 24	16%	13%
25 to 44	42%	47%
45 to 64	42%	40%



Focus group discussion 座談會 –

Two focus groups were conducted on 7th and 8th March 2019.

本會分別在3月7日及8日舉辦了兩場座談會。

Group 1

Customer service staff
前線顧客服務員

- Number of respondents 受訪者人數: 7
- Age range 年齡範圍: 24 - 44

Group 2

Hong Kong customers
本地顧客

- Number of respondents 受訪者人數: 6
- Age range 年齡範圍: 22 - 42

Overview of Digital Landscape

數碼世界概覽

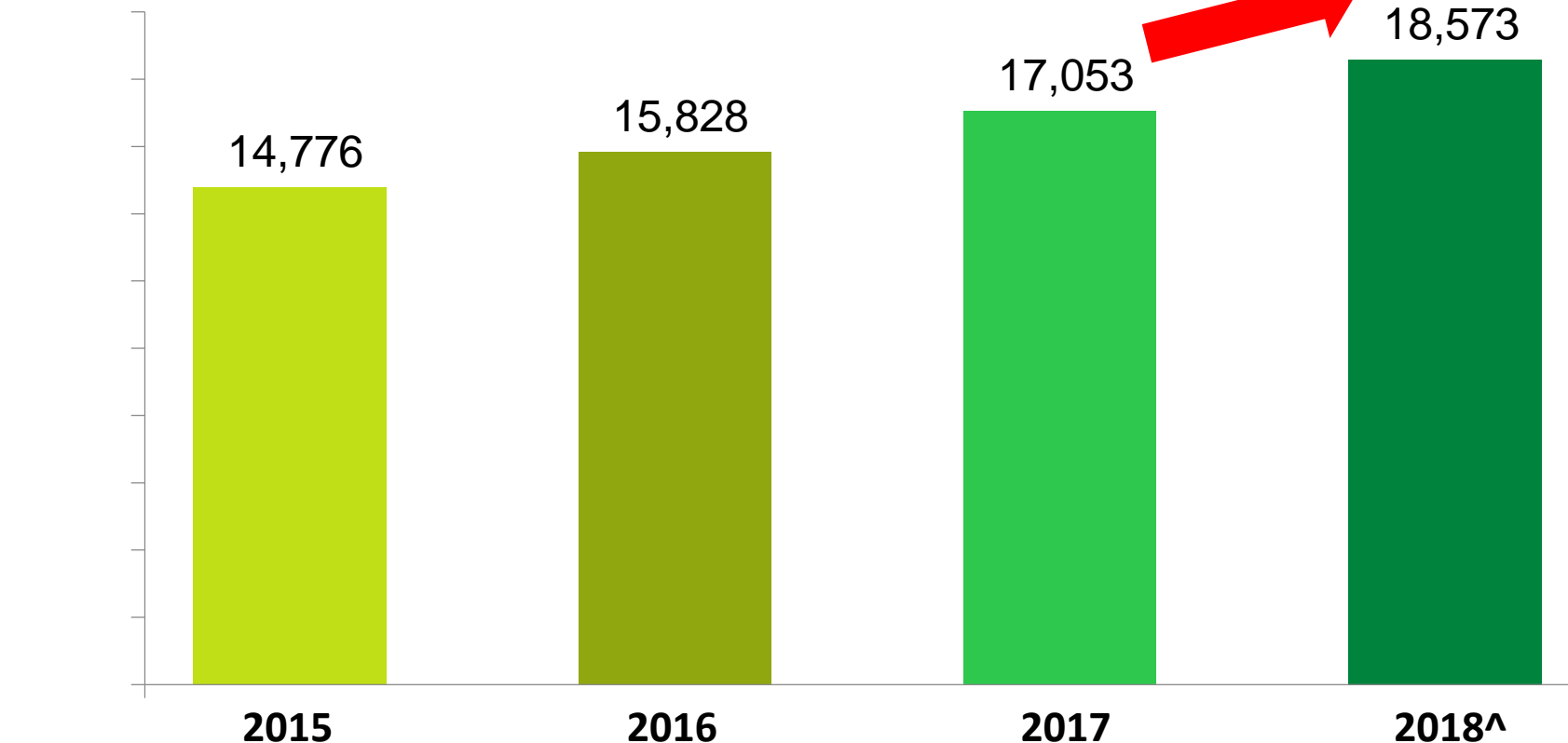
There are 18,573,000 mobile subscribers in Hong Kong in 2018, a 9% increase from 2017.

在2018年，香港流動電話用戶數目為18,573,000，比2017年上升9個百分點。

Mobile subscription in Hong Kong 香港流動電話用戶數目

Population 人口 ('000)	7,309	7,377	7,413	7,482
Average no. of mobile subscription 平均流動電話數目	2.0	2.1	2.3	2.5

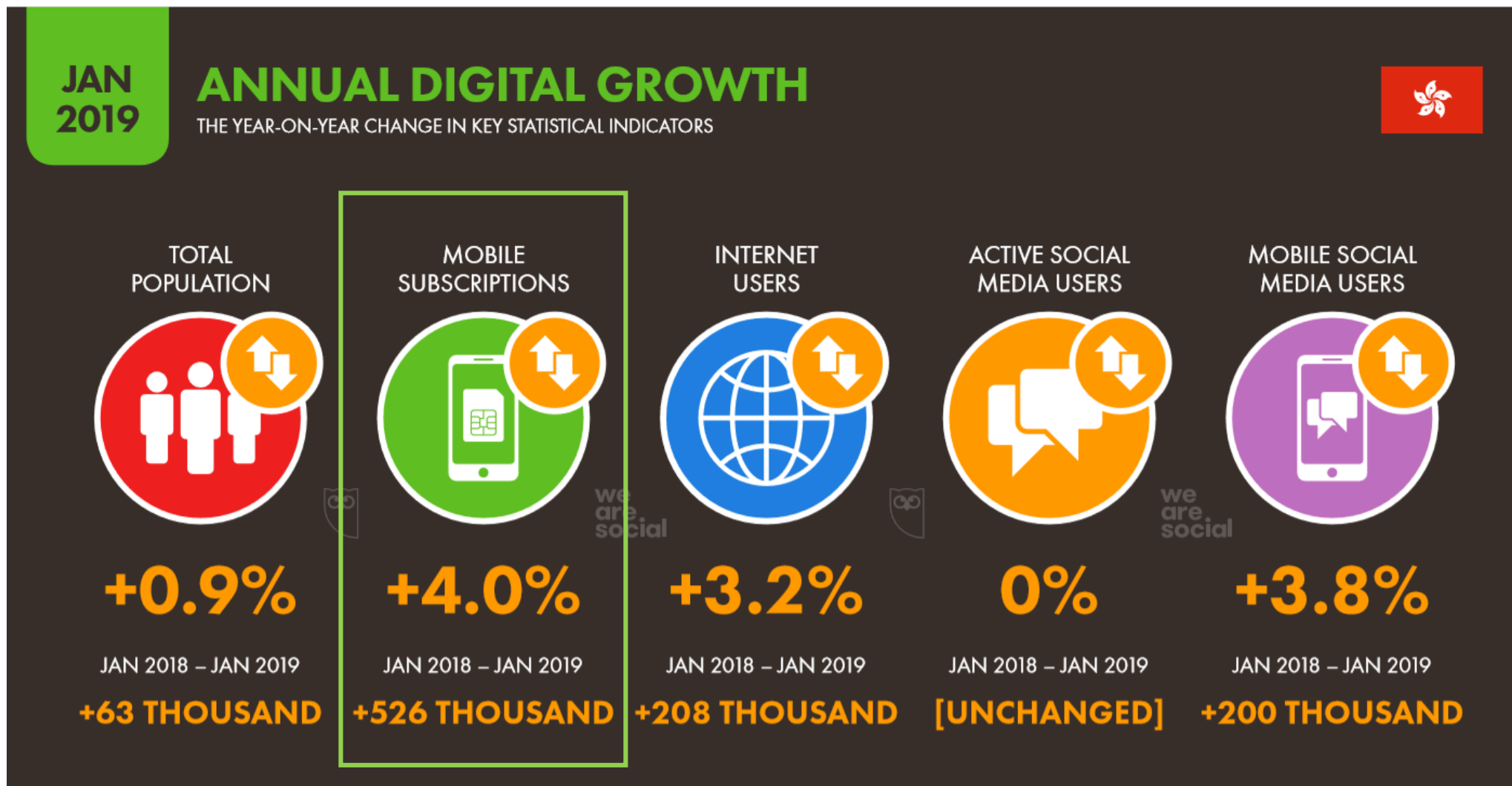
Thousands 千個



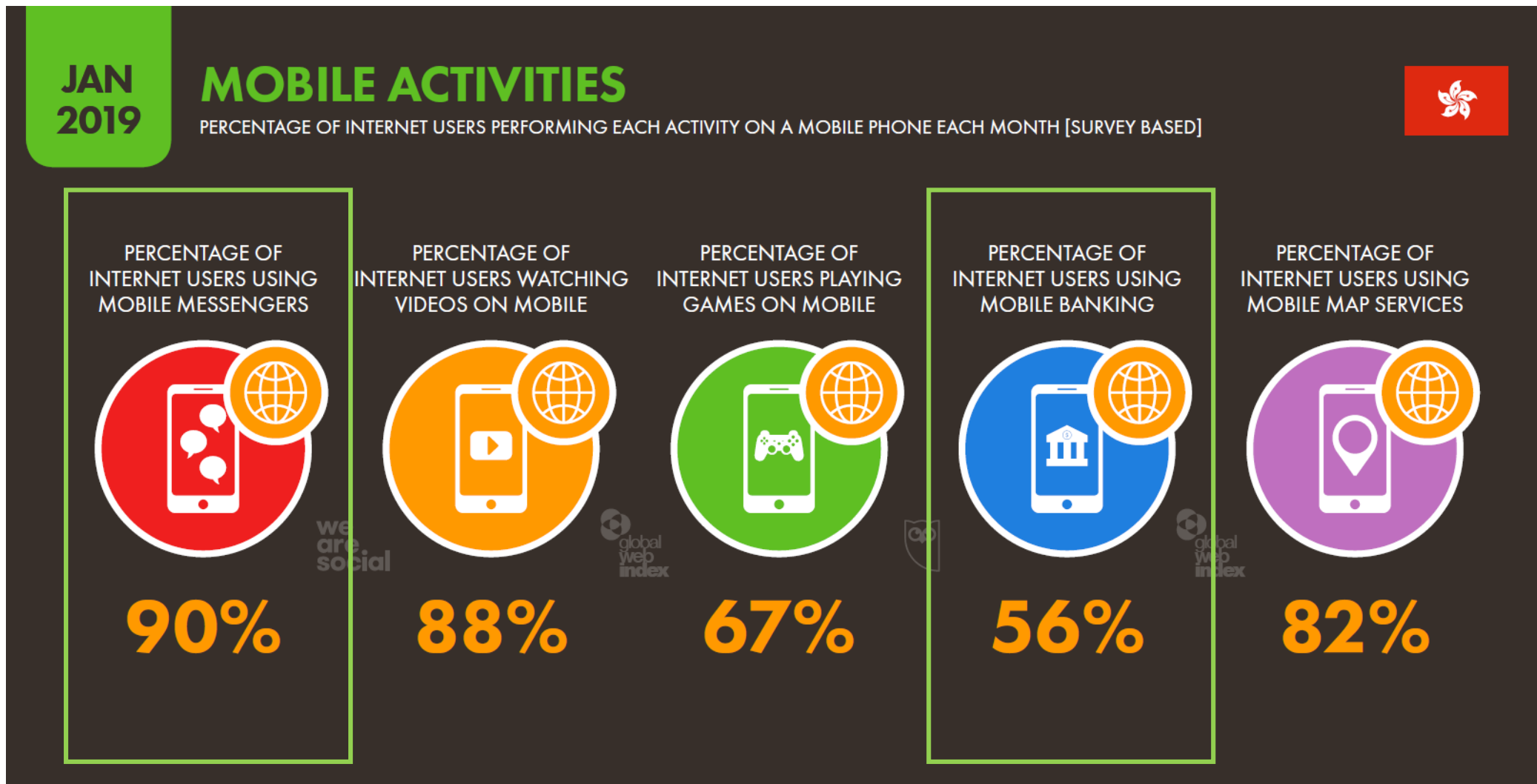
+9%



Mobile subscription will continue to grow with an estimated 4% growth in 2019.
預計在2019年，流動電話數目將會有4個百分點的增長。



Among internet users in Hong Kong, 90% used mobile messengers and 56% used mobile banking.
在香港的互聯網用戶當中，90%使用手機通訊系統，而有56%使用手機銀行服務。



316 million mobile apps were downloaded in 2018 in Hong Kong.
香港人在2018年共下載了3.16億個流動應用程式。

JAN
2019

MOBILE APPS: INSTALLS vs. USAGE

A CLOSER LOOK AT THE NUMBER OF APPS DOWNLOADED AND INSTALLED, COMPARED TO THE NUMBER OF APPS USED

NUMBER OF MOBILE
APPS DOWNLOADED
DURING FULL YEAR 2018



316.3
MILLION

TOTAL CONSUMER
SPENDING ON MOBILE APPS
DURING 2018 (U.S. DOLLARS)



\$739.4
MILLION

we
are
social

App Annie

KEY FINDINGS 主要研究發現

1. Hong Kong customers have become more enthusiastic to use digital services because digital channels are able to meet customers' needs for convenience. Among the various digital channels, mobile apps receive the highest satisfaction and the highest intention to use in the future.

因為數碼服務渠道能夠符合香港顧客對於方便的需求，香港的顧客相比以前更為熱衷於使用數碼服務。香港顧客對流動應用程式的滿意度和未來使用意向在所有數碼渠道當中為最高。

2. Despite the convenience of using digital channels, manned channels continue to be very important to customers for solving urgent or complicated issues, since customers appreciate the immediate attention and resolution received from the human interaction with the customer service staff.

儘管數碼渠道具方便性，但由於顧客重視從與客戶服務人員互動而獲得的即時關注和處理問題的方法，人工渠道對於解決顧客的緊急或複雜的問題仍然非常重要。

3. With the increasing prevalence of using digital channels, customer service employees expect that their companies will strengthen the digital channels in the next two years. Yet half of customer service employees express that they need more time to learn about the use of digital means, and one-third of them feel stressed when serving the customers through the digital channels.

隨著數碼渠道日趨普及，客戶服務職員預料公司將會在未來兩年加強其數碼渠道。不過，有一半的客戶服務職員表示他們需要更多的時間來學習透過數碼渠道來提供客戶服務，而有三分一的客戶服務職員在使用數碼渠道提供客戶服務時感到壓力。

Detailed Research Findings

詳細調查結果

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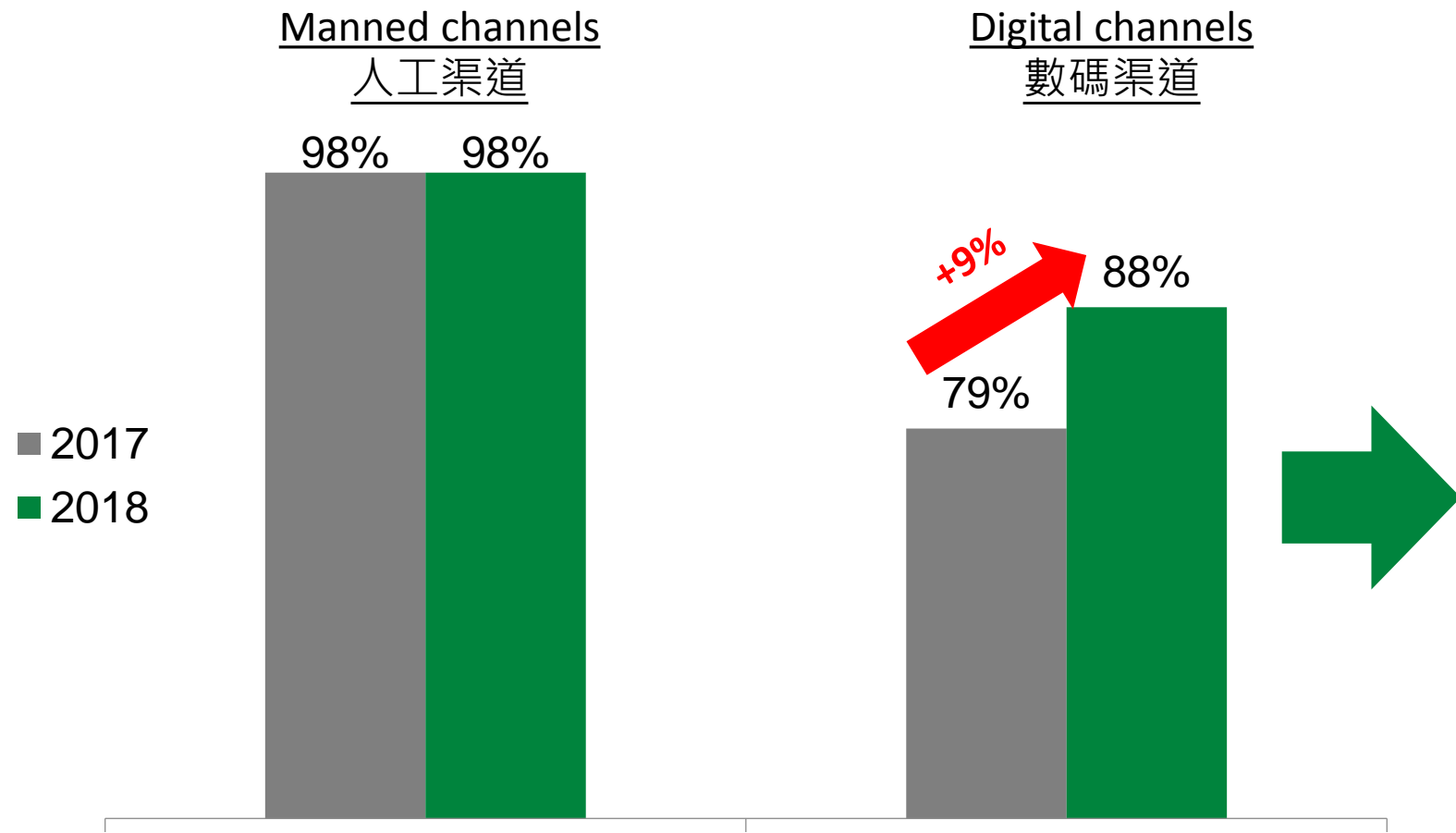


More customers have used digital channels this year (increased from 79% in 2017 to 88% in 2018) to obtain customer services, particularly through official websites/ mobile app and social media.

相比2017年，有更多顧客選擇透過數碼渠道來獲取客戶服務（由2017年的79%上升至2018年的88%）。當中官方網站 / 流動應用程式以及社交媒體的升幅最為顯著。



Channel Usage in the Past 12 Months 過去12個月的渠道使用率

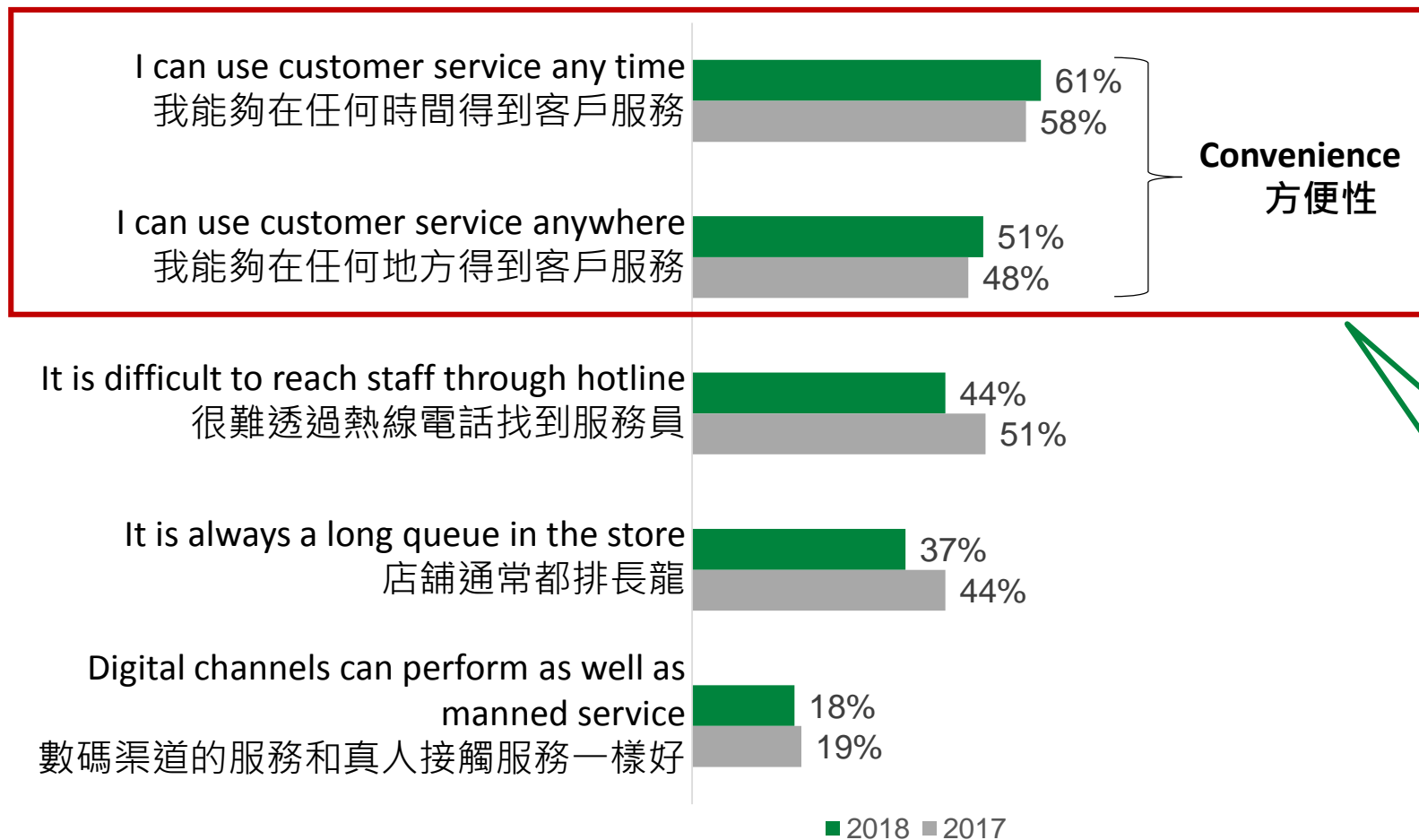


	2017	2018
Official website/ mobile app 官方網站 / 流動應用程式	59%	70%
Email 電郵	39%	49%
Social media 社交媒體	18%	32%
Instant messaging 即時通訊系統	23%	29%



Convenience is the key reason for customers to use digital channels.
方便性是客戶使用數碼渠道的最關鍵原因。

Reasons of using digital channels 使用數碼渠道的原因



Convenience
方便性

"Now when I have queries, I will first go to the official websites to find solutions. In some websites you can type questions and you will find related information. This is very useful and saves me lots of time."

「而家我有問題嘅時候，我會首先去官網度搵解決方法，有啲網頁可以俾你打問題，你就可以搵到相應嘅資料。呢個方法非常有用同埋慳到好多時間。」

"Every one has a phone now. It is very convenient to use mobile apps to look for company information."

「而家個個都有電話，所以好容易用手機app搵公司資訊。」

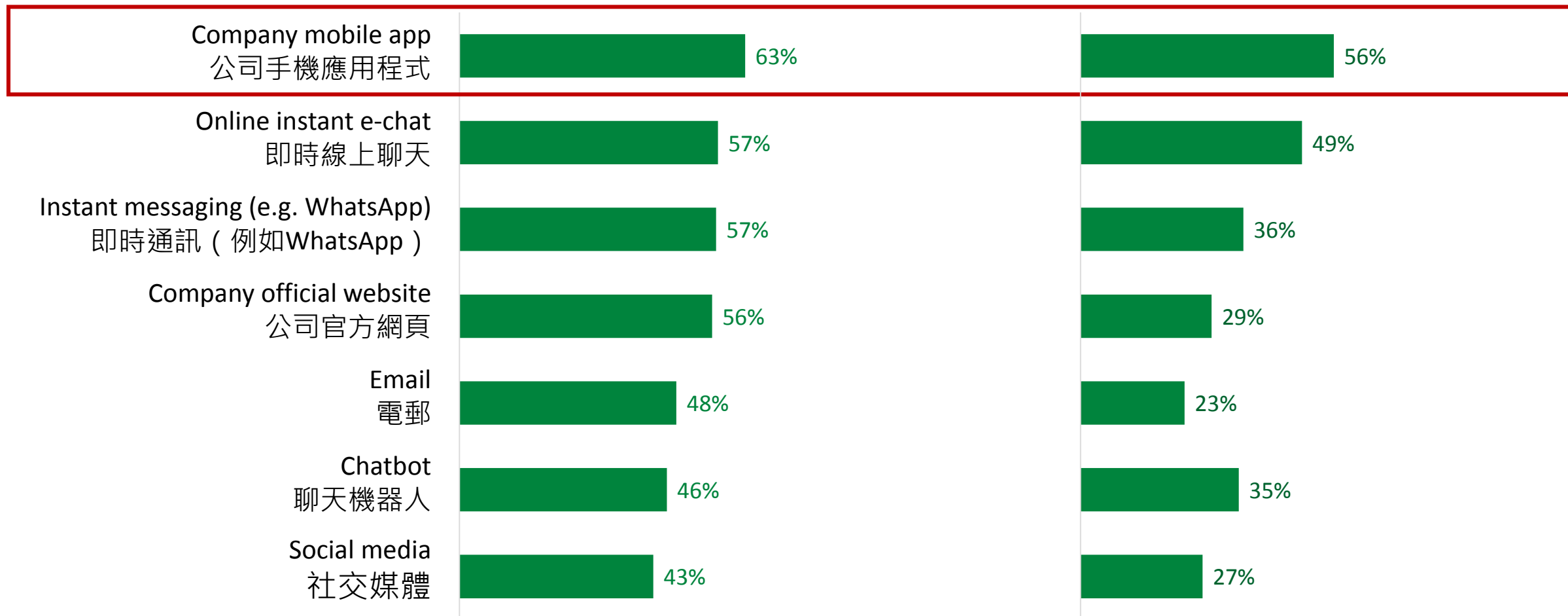
"I ordered food delivery through the app. The order was wrong and I wanted to call the CS. However I can't find the number in the app and I can only use the feedback function in the app. The response was great and they refunded immediately."

「我嗰個app度叫外賣但個order落錯咗，咁我想call客服啦，但係嗰個app度搵唔到個電話號碼，所以我就要嗰個app度用feedback function處理。個反應好好同埋佢哋會即時退款。」

Mobile app receives the highest satisfaction and highest intention to use in the future amongst all digital channels.
在所有數碼渠道當中，香港顧客對流動應用程式的滿意度和未來使用意向為最高。

Satisfaction (very satisfied/ satisfied)
滿意度 (非常滿意/滿意)

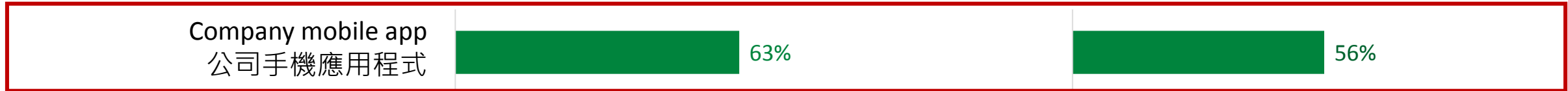
Likelihood to use more in N3Y
可能在未來3年內使用更多



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Advantages of mobile app
流動應用程式的好處

Instant Promotions and Discount
即時促銷和折扣

*“I like downloading company mobile apps because the app will notify me whenever there are **promotions and discounts** (e.g. Flash offer).”*

「我鍾意下載公司手機app，因為個app會
睇有優惠同折扣嘅時候通知我（例如：快
閃優惠）。」

Linkage to Membership Programs
連結會員計劃

*“I download the company mobile app because I want to use **membership program**. I use the app to **gain loyalty points** when making purchase. I can also check balance and redemption information easily with the app.”*

「我下載公司手機app因為我想做佢咁嘅會員。
我可以用個app睇購物嘅時候賺取積分，同埋仲
可以check個餘額同換禮品嘅資訊添！」

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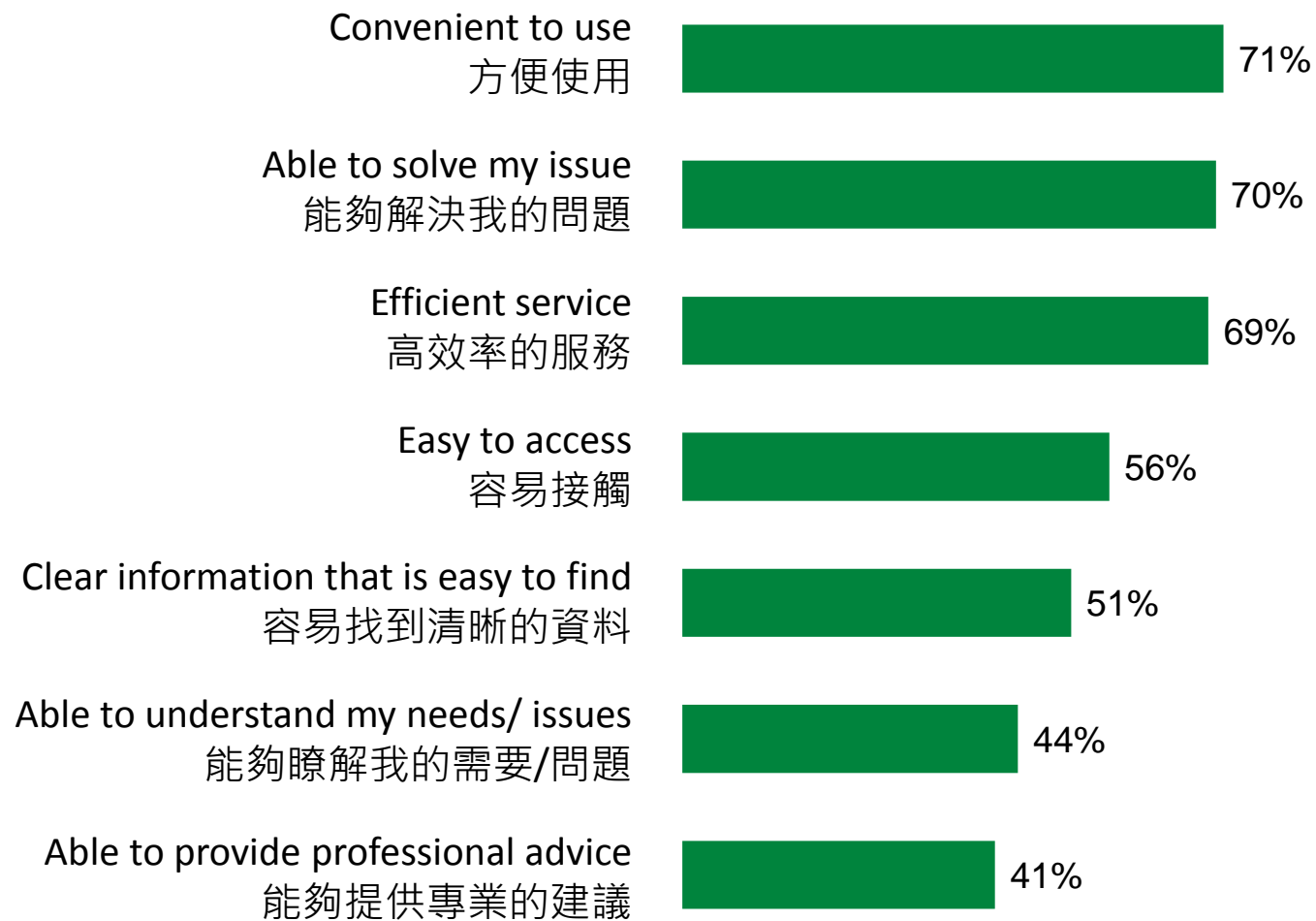
3. With the increasing prevalence of using digital channels, customer service employees expect that their companies will strengthen the digital channels in the next two years. Yet half of customer service employees express that they need more time to learn about the use of digital means, and one-third of them feel stressed when serving the customers through the digital channels.

隨著數碼渠道日趨普及，客戶服務職員預料公司將會在未來兩年加強其數碼渠道。不過，有一半的客戶服務職員表示他們需要更多的時間來學習透過數碼渠道來提供客戶服務，而有三分一的客戶服務職員在使用數碼渠道提供客戶服務時感到壓力。

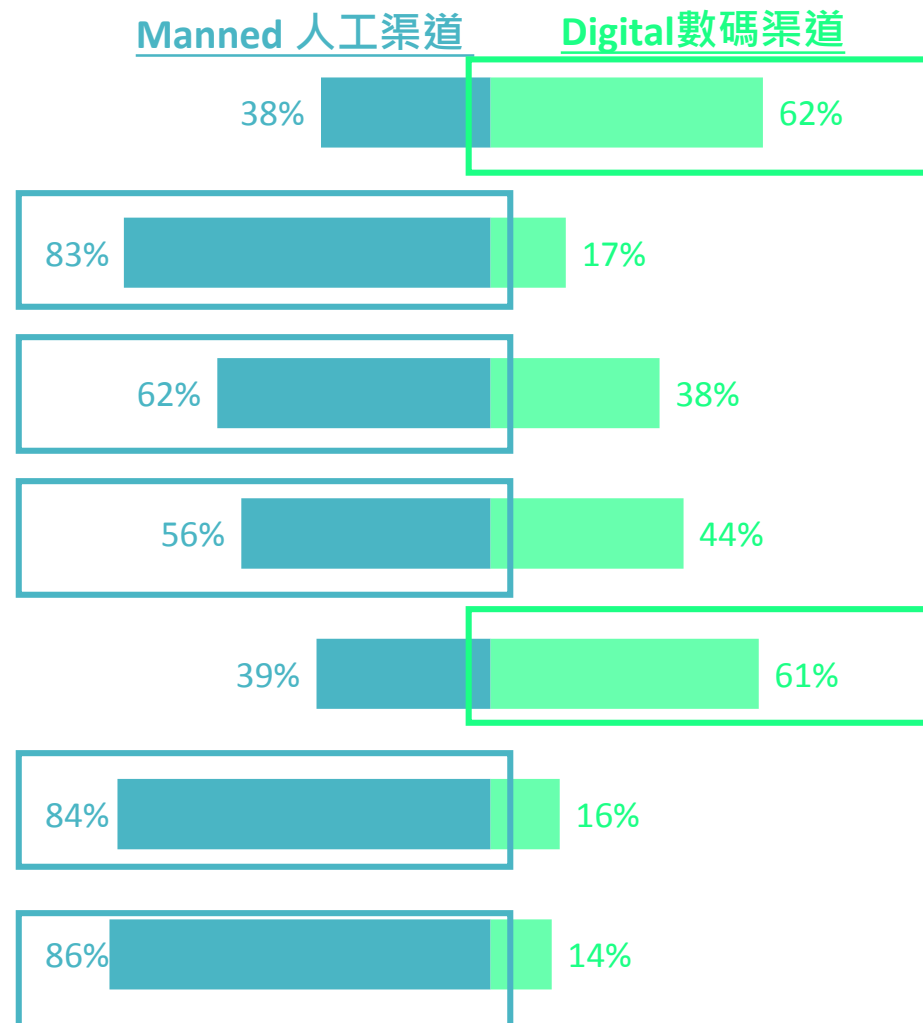
Convenient to use is the most important factor for customer service and customers think that digital channels perform better in this aspect. However, manned channels are better in the ability of solving customers' issues, efficiency of services as well as ease to access.

顧客認為方便使用是客戶服務最重要的因素，而數碼渠道在這方面表現較好；人工渠道則較能夠解決客戶問題，服務效率較高和容易接觸。

Important factors 重要因素

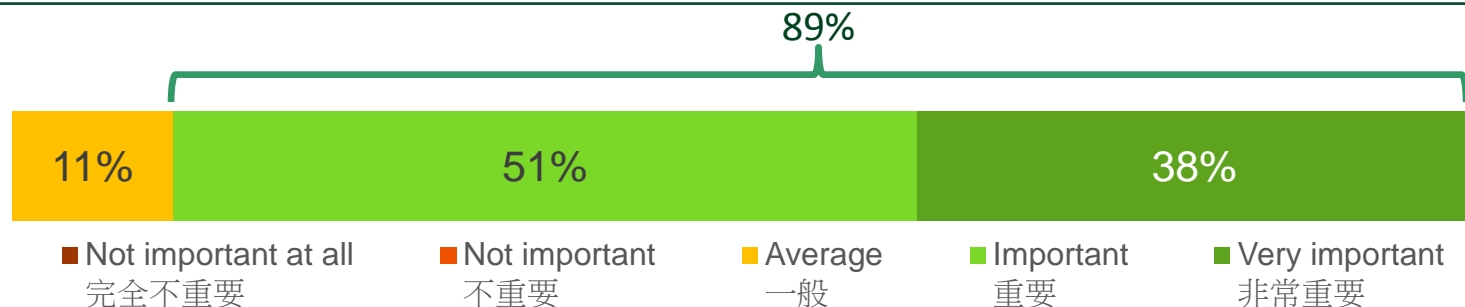


Top performing channel 表現最佳的渠道

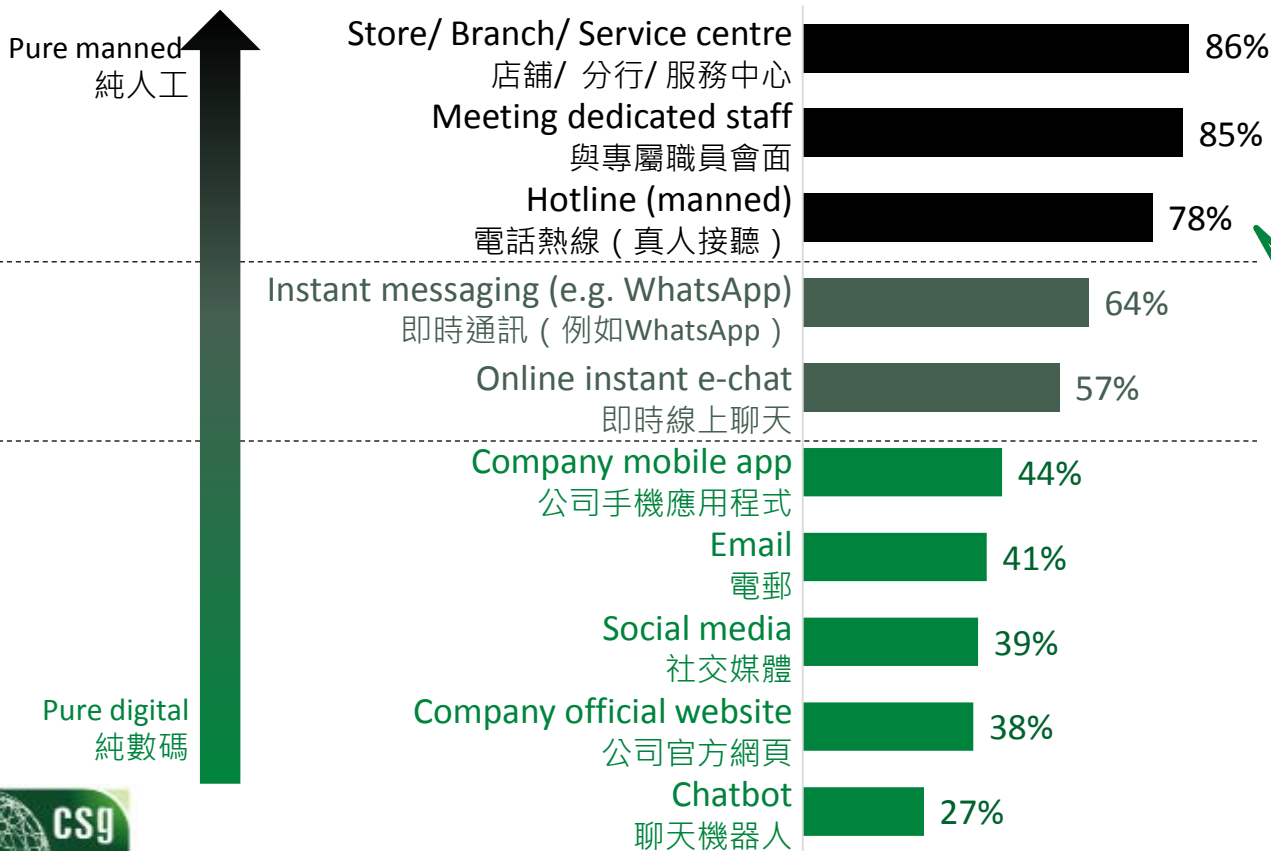


Nearly 90% of customers think that ability to solve problems first time is important to them and that manned channels are able to solve their problems first time than digital channels.
 接近九成的顧客認為能夠在第一次接觸客戶服務便能解決到問題是重要的，而人工渠道比數碼渠道更加能夠在第一次接觸客戶服務時便能解決到問題。

Importance of solving problems the first time 第一次解決問題的重要性



Able to solve problems first time 能夠第一次便解決到問題



"I prefer calling hotline for urgent matters. Once I reach a customer service agent, I can ask all the details. I won't let go until I've got what I want to know."
 「遇到緊急情況我寧願call熱線，當我聯絡客服嘅時候，我可以問到所有資料。我問唔到我想問嘅嘢我係唔會收線嘅。」

"I have booked a travel package online and I canceled it using the app. However, a month was gone I still didn't be refunded. I sent emails but no reply. Finally, I called the hotline and the staff helped me right away."
 「我上網訂咗個旅遊套票，然後我喺個app度取消咗。但係一個月之後我都未收到退款。我send email但係冇人覆。最後，我打去熱線嗰度，個熱線職員就直接幫我解決咗。」

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Most customer service employees see that their companies have strengthened, and will strengthen the various digital channels that they offer; and they also agree that this trend is good for customers.

大部分客戶服務員工覺得他們現職的機構在過去兩年曾加強數碼渠道，並在未來兩年繼續加強數碼渠道。同時，他們亦認為此趨勢對於顧客是有利的。



71%

of customer service employees see that their company **has strengthened** digital channels **in the past 2 years.**

的客戶服務員工覺得現職的機構在過去兩年有加強數碼渠道。

76%

of customer service employees see that their company **will strengthen** digital channels **in the next 2 years.**

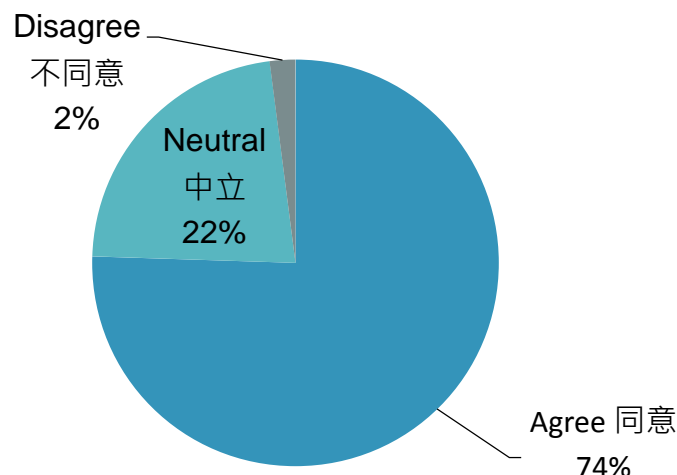
的客戶服務員工覺得現職的機構在未來兩年將會加強數碼渠道。

Perceived benefit of digital channels

數碼渠道的好處

I think **more and more customers prefer** contacting customer services through **digital channels.**

我認為越來越多顧客喜歡透過數碼渠道使用顧客服務。



*“After my company launched the mobile app, I receive **less calls** because more customers, especially younger ones, use mobile app.”*
 「我公司推咗手機app之後，我接少咗電話因為多咗客用個app，尤其是係後生嗰班客。」

~hotline staff 熱線員工

“My company has launched some automated teller machines and I see more customers are willing to use them. This will help us focus on customers with more complicated request.”
 「我公司推咗啲自動櫃員機，我見到多咗客會用佢哋。呢樣可以幫到我哋集中處理一啲客人複雜嘅要求。」

~branch staff 分行職員



Around half of customer service employees expressed that digital channels takes up more of their personal time to serve customers (49%) and to learn how to use digital channels (48%). Around one third (32%) feel stressed when serving customers via digital channels.
 大約一半的客戶服務員工表示他們花上更多私人時間來為客戶提供數碼服務（49%）或用來學習如何使用這些渠道（48%）。大約三分一的客戶服務員工認為使用數碼渠道去提供客戶服務感到大壓力（32%）。



Challenges Customer Service Employees Face with Digital Channels 客戶服務員工在使用數碼渠道時所遇到的挑戰

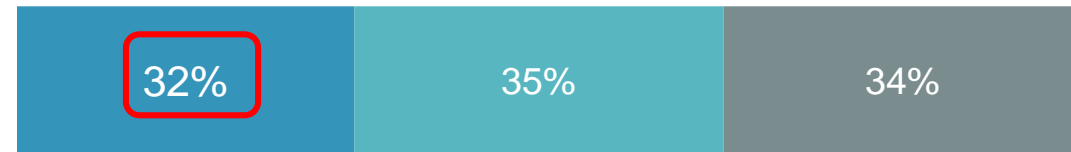
It takes up more of my personal time when I use digital channels to serve customers.
 使用數碼渠道為顧客提供服務會花上更多私人時間。



It takes me more time to learn how to use digital channels to serve customers than the traditional channels.
 相比起傳統渠道，我要花更多時間學會應用數碼渠道去為顧客提供服務。



I feel stressed when serving customers via digital channels.
 我在透過數碼渠道為顧客提供服務時，會感到很大壓力。



■ Agree 同意 ■ Neutral 中立 ■ Disagree 不同意

Some customer service employees think that digital channels takes up them more time to serve customers and they have to face more complicated problems with digital channels.

有些客戶服務員工表示使用數碼渠道會花上他們更多時間來為客戶提供服務，並會因為數碼渠道的普及令他們需要面對更複雜的問題。

Challenges Customer Service Employees Face with Digital Channels

客戶服務員工在使用數碼渠道時所遇到的挑戰

*“I am a broker and more customers now contact me through WhatsApp. Every day when I wake up, I see **more than 10 WhatsApp messages sent during midnight**. Every morning I am busy replying them one by one.”*

「我係個經紀。而家越來越多客經WhatsApp聯絡我。每朝我起身我都會見到超過10個WhatsApp等我覆。每朝我都好忙咁逐一覆佢哋。」

~ dedicated staff 專責員工

*“Customers can now access information online. When they call us, they **expect us to provide them with service same as other companies**. I feel stressed because I need to get updated on the industry in addition to my company’s products.”*

「而家客人可以上網睇資料，佢哋打俾我嘅時候，都預我哋能夠提供其他公司有嘅服務。我覺得好大壓力，因為我除咗要熟悉自己公司嘅產品之外，仲需要知道行業上最新嘅資訊。」

~ dedicated staff 專責員工

*“The new AI robot installed has required me **more time to teach customers to use the machine**.”*

「新安裝嘅人工智能機械人令我需要花更多時間去教客人用呢部機器。」

~ dedicated staff 專責員工

*“I need to solve IT problems, but I do **not have the access right nor the knowledge** to help customers solve their problems with their mobile app or internet account.”*

「我需要解決IT上嘅問題，但係我無任何權限或者知識去幫客人嘅手機app或者網上個帳戶解決問題。」

~ hotline staff 熱線員工

KEY FINDINGS 主要研究發現

1. Hong Kong customers have become more enthusiastic to use digital services because digital channels are able to meet customers' needs for convenience. Among the various digital channels, mobile apps receive the highest satisfaction and the highest intention to use in the future.

因為數碼服務渠道能夠符合香港顧客對於方便的需求，香港的顧客相比以前更為熱衷於使用數碼服務。香港顧客對流動應用程式的滿意度和未來使用意向在所有數碼渠道當中為最高。

2. Despite the convenience of using digital channels, manned channels continue to be very important to customers for solving urgent or complicated issues, since customers appreciate the immediate attention and resolution received from the human interaction with the customer service staff.

儘管數碼渠道具方便性，但由於顧客重視從與客戶服務人員互動而獲得的即時關注和處理問題的方法，人工渠道對於解決顧客的緊急或複雜的問題仍然非常重要。

3. With the increasing prevalence of using digital channels, customer service employees expect that their companies will strengthen the digital channels in the next two years. Yet half of customer service employees express that they need more time to learn about the use of digital means, and one-third of them feel stressed when serving the customers through the digital channels.

隨著數碼渠道日趨普及，客戶服務職員預料公司將會在未來兩年加強其數碼渠道。不過，有一半的客戶服務職員表示他們需要更多的時間來學習透過數碼渠道來提供客戶服務，而有三分一的客戶服務職員在使用數碼渠道提供客戶服務時感到壓力。

Recommendation

建議

RECOMMENDATION 建議

Recommendation from HKACE:

- We are delighted to see customers continued to use more digital services. However, we must make sure our digital channels or services create value and convenience to our customers in areas that matter to them.
 - Companies should continue to develop Mobile apps as it receives higher satisfaction and intention to use in the future
 - Improve user experience with chatbots, which have lower satisfaction and intention to use
- While advocating 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. At the same time, companies need to ensure the customer service staff are equipped and trained to deliver service digitally, in order to keep up with the pace of technology advancements.

香港優質顧客服務協會（HKACE）的建議：

- 我們很高興看到顧客繼續使用更多的數碼服務。但是，我們必須確保我們的數碼渠道或服務能為顧客創造價值和提供便利。
 - 公司應該繼續開發流動應用程式，因為它的滿意度和使用意向較高
 - 改善顧客使用聊天機器人的體驗，因聊天機器人的滿意度和使用意願較低
- 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。同時，公司需要確保客戶服務人員有足夠的裝備和培訓來以數碼方式提供客戶服務，以跟上科技發展的步伐。



RECOMMENDATION 建議

Recommendation from HKACE:

- In order to create good customer experiences, companies should strive for holistic strategies that look at end-to-end processes rather than rolling out digital features in isolations. They should leverage the right digital channels to create the engaging experience when new and existing customers come into interactions with them.
- With our "i-Service, I Serve" theme, HKACE will work with our fellow industry players to provide Hong Kong customers with satisfactory customer journey through experience sharing, company visits and research findings sharing, to uplift Customer Service staffs' readiness and knowledge to provide customers services on digital platforms.

香港優質顧客服務協會（HKACE）的建議：

- 為了創造良好的顧客體驗，公司應該制定完善的整體顧客服務策略而不是在個別範疇提供數碼功能。當新舊客戶與我們進行互動時，我們應善用數碼渠道來創造吸引的服務體驗。
- 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，提高客戶服務人員的知識和準備，在數碼平台上提供客戶服務。

Q&A



香港優質顧客服務協會
Hong Kong Association for
Customer Service Excellence