



VONAGE GLOBAL CUSTOMER ENGAGEMENT REPORT 2025

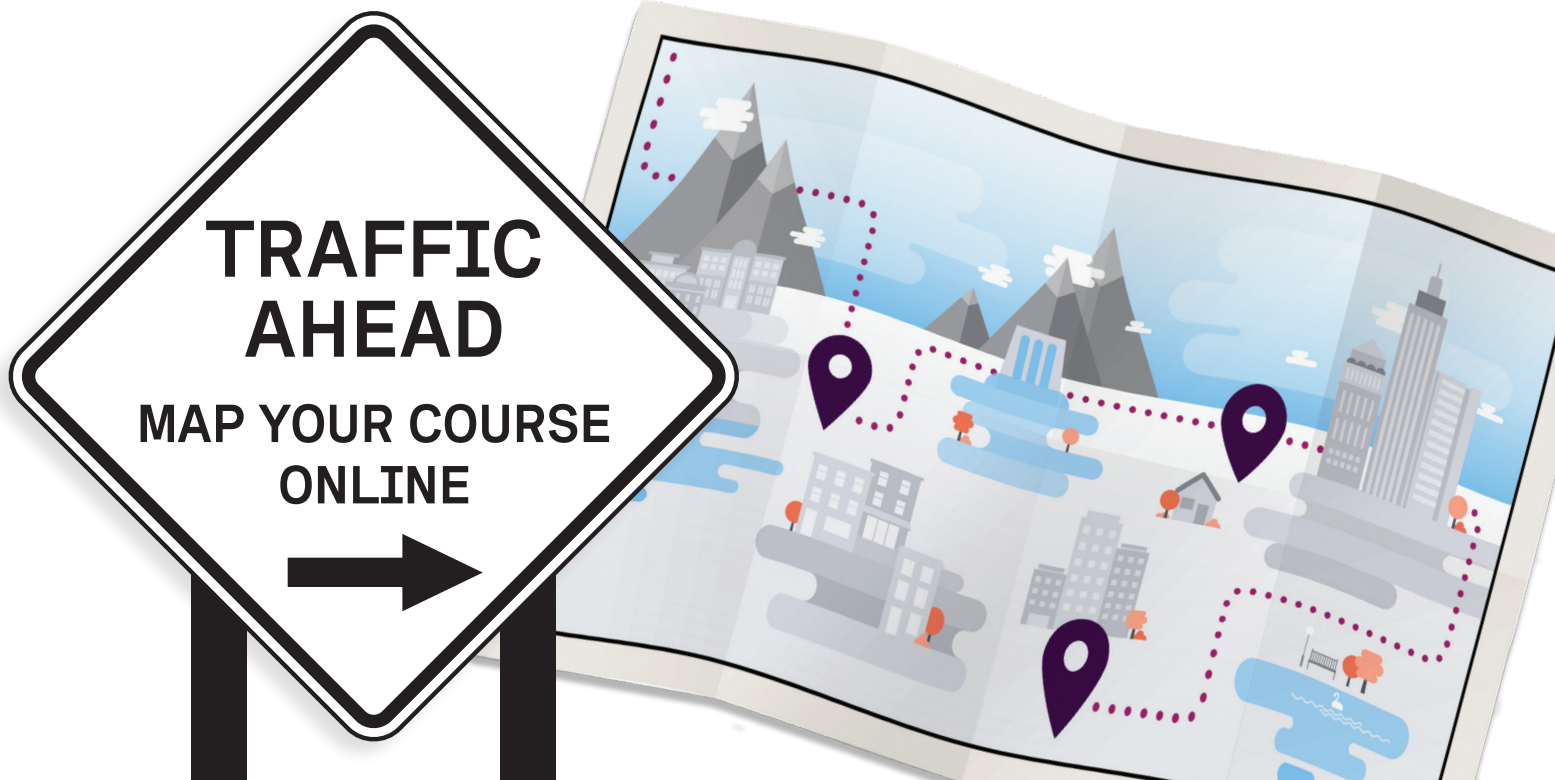
Where AI Meets CX: Your Practical Roadmap

YOU ARE HERE:

Welcome to the intersection of customers and communications. This is where your communications strategy matches customer preferences for the ultimate engagement and experience.

Getting here isn't easy ... which is why we asked over 7,000 customers across 17 global markets for their insights, pain points, and must-know preferences. Their feedback fueled our data-driven roadmap.

And we've charted this easy report to direct the way. Join us as we guide you through an exciting AI and CX ride.



Points of Interest

Executive Summary

Customer Experience: The Three-Way Intersection

- Utopian Road
- Reality Road
- AI Road

Facts About Today and Tomorrow

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- AI-powered support tools

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- Multichannel communications

Customer Frustrations and How AI Can Help

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- CRM Integration
- AI Virtual Assistant and Live Agent Assist
- Conversational Marketing and Commerce
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- AI attitudes and experiences
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- AI interest and AI concerns
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- Impact of authentication
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Appendix

Current Communications by Country

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The Channels: Voice Calls

The Channels: Video

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Snapshot: APAC

- Australia Spotlight
- China Spotlight
- India - North Spotlight
- India - South Spotlight
- Indonesia Spotlight
- Japan Spotlight
- Singapore Spotlight
- South Korea Spotlight

Snapshot: EMEA

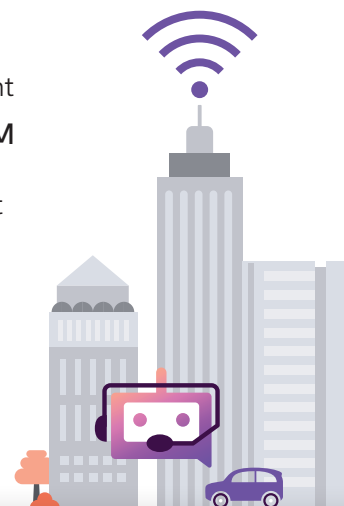
- France Spotlight
- Germany Spotlight
- Italy Spotlight
- Spain Spotlight
- Sweden Spotlight

Snapshot: LATAM

- Brazil Spotlight
- Mexico Spotlight

Snapshot: UK

Snapshot: U.S.



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Executive Summary

Welcome to the **Vonage Global Customer Engagement Report 2025**. This **13th annual report** summarizes key communication trends to help you reach and engage customers. You'll find insights from over 7,000 consumers participating across 17 global markets, such as:

The embarrassing truth (still)

Customers love when businesses answer and engage them right away. Unfortunately, they also note long wait times to speak to an agent or contacting customer service multiple times to resolve issues as chronic frustrations. More technology-driven solutions are available than ever ... and yet, these decades-old pain points remain unsolved.

CX matters (a lot)

It may be easy to gloss over repeated frustrations and growing stats as business as usual. But failure to fix leads to lost business as usual. Pay attention:

After a bad customer experience:

- **75%** of customers are likely to take their business elsewhere.
- **48%** of customers only need one or two bad experiences before they leave.

But after a great customer experience:

- **57%** of customers will give positive feedback on a survey.
- **53%** of customers will tell friends and family.
- **52%** of customers will become more loyal to company or provider.
- **35%** of customers **WILL PURCHASE ADDITIONAL PRODUCTS**.

Also, the rise in data breaches has a huge influence on brand loyalty and consumer behavior:

- **Over 75%** of consumers are less likely to stay with providers that experience an online data breach, even if their personal information is not exposed.
- **Nearly 90%** of consumers are less likely to stay with providers that experience an online data breach in which their personal information is exposed.

AI is a trusted friend

Customers follow their schedule, not yours. And they will contact a business by phone, email, text — you name it — to find the fast fix. AI satisfies this want for convenience and speed. The spike in push notifications, for example, is an ongoing example of customers embracing AI for 24/7 service.

AI makes every channel an optimal channel

Sure, customers can call businesses in the morning and chat in the evening. That's not by choice. Ideally, their issues should be corrected with the first contact — and AI can bring the smarts to make the initial channel the optimal channel. So it's important to dive into the report details to discover what channels customers like and how they prefer to communicate. Then you can further dial the AI-specific benefits to transform your customer communications, customer journey, and overall customer experience strategies.

The dawning of the intelligent agent era

Early chatbots were procedural, where customers went from point A to point B in a potential loop. Chatbots have now evolved into fully AI-powered intelligent agents — that leverage natural language understanding (NLU) and large language models (LLMs) — to better engage with customers and help them complete a variety of tasks. These new intelligent agents have the ability to transform CX for both businesses and consumers.

Where AI Meets CX: Your Practical Roadmap

Grab hold of the wheel and follow our in-depth road of customer frustrations, channel preferences, and AI-enhanced solutions to help reach your CX destination

Customer Experience: A Three-Way Intersection

Customer experience follows three roads: Utopian, Reality, and AI.

CLEAR AHEAD

Utopian Road

Every stop in the journey is a model of effective customer communications and positive CX. For example, customers contact you across numerous channels — often, with multiple or non-related questions. Customers never have to repeat themselves and agents are updated every time. That's utopia, not reality.

CLOSED TO CX TRAFFIC

Reality Road

Every stop is a customer nightmare:



Pitstop 1:

Customers send an initial text and never get a response.



Pitstop 2:

They follow up by phone and dangle from a phone tree.



Pitstop 3:

They start a chat and get ghosted, again.



Pitstop 4:

They finally reach a live agent ... only to be routed to a second agent, where they must repeat the authentication and issue.



Each frustrating moment is a data point that leads to lost business. **In fact, 75% will stop buying after a bad experience — and 48% only need one or two bad experiences before they bounce.**

ALTERNATE ROUTE

AI Road

Communications APIs and contact center solutions can proactively service customers. This optimizes every channel, so your customers must only reach you once. And more time engaging with you — rather than chasing you — **means more time doing business with you.**



Facts About Today and Tomorrow

Satisfaction with communications methods

Only 42% of consumers are "very satisfied" when communicating with businesses.

This stat remains flat from last year, indicating that there's always room for improvement ... especially when it comes to **fraud protection**.

Channel usage by region



Messaging/Texting

- 91% of consumers use at least one messaging/texting platform, as global usage of these methods continues to increase (up from 87%).
- WhatsApp and SMS are the most widely used platforms.
- The U.S. shows strong SMS usage.
- APAC (India, Indonesia, and China) and LATAM (Brazil and Mexico) lead in overall messaging app usage.



Video

- 77% of consumers use video chat/call platforms, as global usage of this method continues to strengthen (up from 74%).
- Zoom has solid usage in most markets.
- Strong WhatsApp usage in Brazil, Germany, Spain, and Singapore.
- India, Indonesia, China, and Brazil lead in video usage.



Voice Calls

- 93% of consumers use at least one voice channel, as usage of voice/phone remains very strong.
- Mobile phone calls continue to be the most widely used voice communications method, followed by WhatsApp.
- Voice call usage is very high in most markets, particularly India, Indonesia, and China.
- Mobile phone usage is strong across most markets, including the U.S.
- Strong WhatsApp preference in Brazil and Indonesia.



Social Media

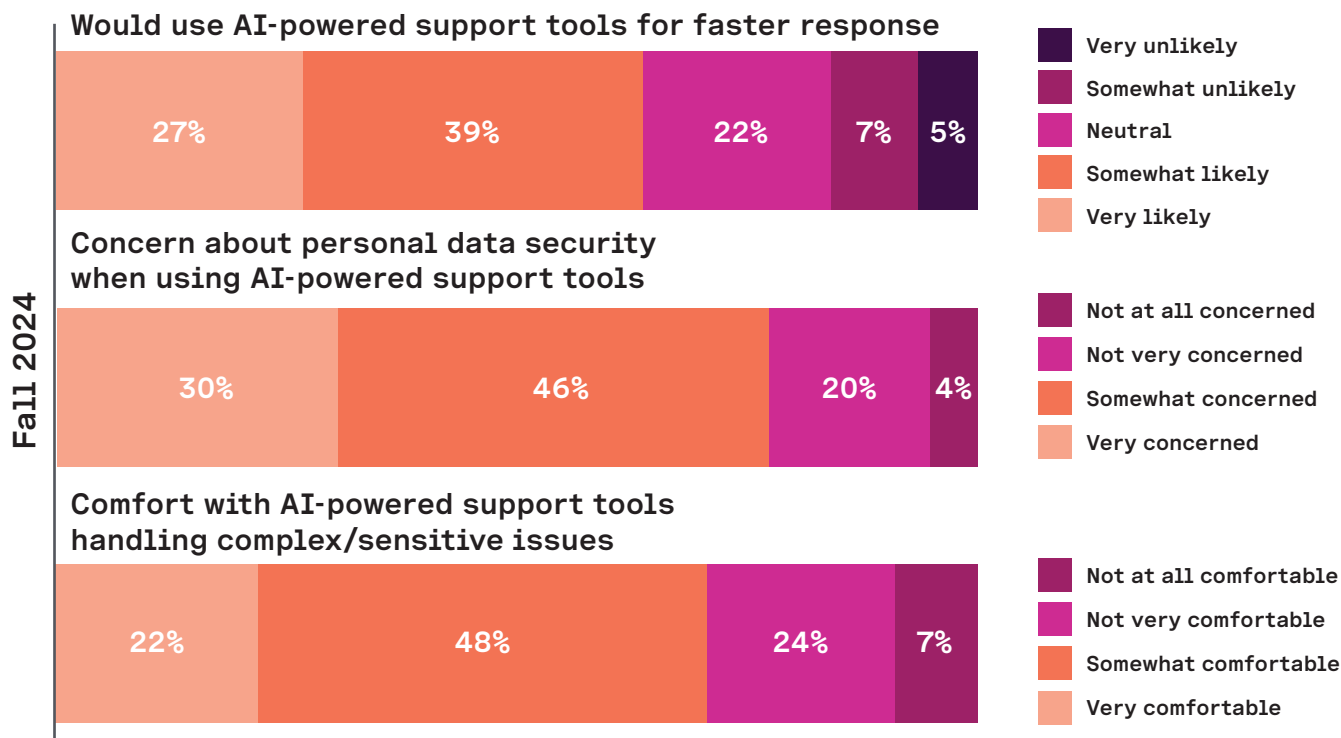
- 80% of consumers use social media platforms, as global usage of this method continues to strengthen (up from 78%).
- WhatsApp, Facebook Messenger, Instagram, and YouTube have solid usage across markets — except for China and Japan.
- Facebook Messenger leads all other platforms in the U.S., Sweden, and Australia.

Q: How satisfied are you with the available methods for communicating with businesses and service providers (e.g., by voice, text, video, etc.)?

See Appendix

Current Communications by Country
and **Regional- and Country-Specific Insights.**

AI-powered support tools



Key takeaways

- Most consumers are likely to try AI-powered support tools in return for faster response — think shorter wait times. These include over 25% who are very likely to seek AI-assisted help.
- Messaging apps and website chat are the most widely preferred AI-powered support channels.
- Nearly 75% are concerned about the security of their personal data and fewer than 25% are “very comfortable” with these AI support tools handling complex or sensitive issues.

Q: For faster response (shorter wait times), how likely would you be to try using AI-powered support tools instead of live human support representatives the next time you need help?

Q: How concerned are you about the security of your personal data when interacting with AI-powered customer service tools?

Q: How comfortable are you with AI-powered support tools such as virtual assistants and chatbots handling more complex and sensitive customer service issues?

25%

**VERY LIKELY
TO SEEK
AI-ASSISTED
HELP**

AI Usage Continues To Rise

You'll find detailed analysis, including regional- and channel-specific consumer insights, in the **Appendix**. The following are the top highlights we see for 2025. These methods continue to emerge and benefit from AI.

Current vs. future communications

Businesses/service providers

- **Chatbot:** 9% currently use daily | 32% will increase in next 6-12 months
- **Video chat:** 11% currently use daily | 28% will increase in next 6-12 months
- **Automated phone support:** 11% currently use daily | 25% will increase in next 6-12 months
- **Webpage/in-app calling:** 13% currently use daily | 25% will increase in next 6-12 months
- **Voice personal assistants:** 14% currently use daily | 26% will increase in next 6-12 months

Key takeaways

- **Personalization is preferred.** Whether by chat, automated phone support, calling, or voice personal assistants — customers want personalized attention. Should an escalation occur, make sure you can route to a live agent with context.
- **Webpage/in-app calling captures the moment.** Just imagine if customers are already engaged through your site or app. Now a single tap brings them in direct contact with you.
- **In-app usage is up.** AI integration helps you to further service customers by answering quick questions, routing to a live agent, or even closing a sale.
- **Attendance not required.** Automated phone support and voice personal assistants are great ways to immediately engage customers. Continually review frequently asked questions and interactions — and integrate those into your automations.
- **Video chat is more than a 1:1 connection.** This is a great chance to use AI capabilities and machine learning to anticipate a customer call and prompt responses for help service agents. For example, AI can conduct real-time sentiment analysis to escalate a call as needed. When agents join the video call, they can reference AI-generated insights to quickly resolve a customer concern.

Q: How often do you connect with any business or service provider using each of the following?

Q: In the next 6-12 months, how will your methods of communicating with businesses or service providers change?

Want more next steps?

See **Customer Frustrations and How AI Can Help** and **AI: Two-Way CX Traffic**.



Emerging methods that customers love

Generally, communications with businesses fall into two clusters based on shared usage patterns:

- Established methods with mostly wider adoption
- Emerging methods with lower usage levels that tend to occur among the same consumers

Note:

- *Live chat/messaging within apps are unrelated to the other channels.*
- *Younger consumers are generally more active communicators, with higher usage of every communications method with businesses.*

Established methods

Mobile phone call
Messaging via non-SMS apps
Phone call via messaging apps
SMS text messaging
Email
Commenting on social posts

Emerging methods

Chatbot
Automated phone support
Voice personal assistant
Voice call from webpage or within app
Video chat
Push notifications

Usage independent of other methods

Live chat/messaging within app

Q: How often do you connect with any business or service provider using each of the following?



For example, consumers using chatbots are also more likely to use automated phone support, voice personal assistants, in-app calling, and video chat.

These speak to important trends:

Customers love choices

If you offer a channel, customers will use it. That's right, omnichannel is still an important strategy.

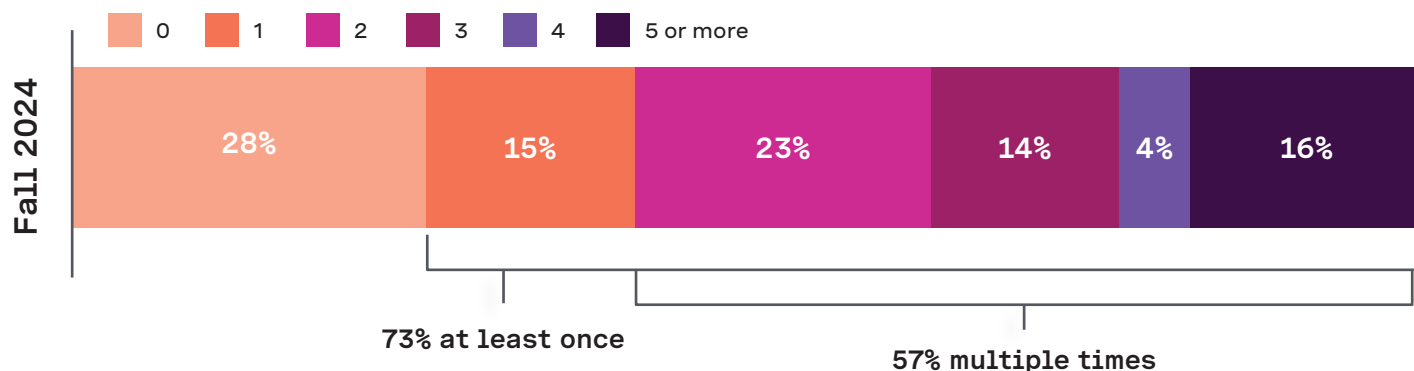
New favorite channels all have an AI element

Remember, customers follow their schedule and AI solutions give them flexibility and immediacy beyond store hours — like to answer simple questions.

And future iterations will have access to large language models (LLMs) and entire company and third-party databases, understand natural language questions, and have the right flows built in to suggest next best actions. In some cases, this could result in a transfer to a live agent.

Multichannel communications

Number of multichannel communications in past year



Key takeaways

- Customers actively choose to engage with AI – and this is likely going to continue. Use this to your advantage.
- Nearly 75% of consumers have had multi-channel communications with businesses in the past year (starting with one method then switching to another to continue discussing the same topic).
- Over 59% have done this multiple times, including over 10% who experienced it 5+ times.
- Rather than going with off-the-shelf options, enjoy the control and integration by using communications APIs or contact center solutions – with AI insights that tie to your CRM and back office – to build your solution.

Q: In the past year, how many times have you started communicating with a business using one method and then switched to another method to continue discussing the same topic (e.g., starting via email and then switching to SMS/text, starting on social media then switching to voice call, etc.)?

75%
MULTICHANNEL
COMMUNICATIONS

Customer Frustrations and How AI Can Help

It's never been easier to fix the frustrations that have plagued businesses. Thank you, AI.

Voicebots and IVRs

Reality Road (Frustration)	Long wait times to speak to agent 65%
AI Road (Solution)	AI powers virtual assistants and intelligent agents that eliminate long hold times for common requests, plus smart IVR and chatbots for initial call triage. FAQ bot uses customer input to identify the most asked transactional questions and automate responses. Customers can still request a live agent if needed.
Reality Road (Frustration)	Phone menu voice commands can't understand you 56%
AI Road (Solution)	Voicebots and IVRs help guide customers, while speech-to-text — enhanced with natural language understanding and accurate transcription — quickly solves common customer problems and provides CX insights.
Reality Road (Frustration)	Phone menu too long to navigate, missing needed options 57%
AI Road (Solution)	Voicebots and IVRs help guide customers, while speech-to-text — enhanced with natural language understanding and accurate transcription — quickly solves common customer problems and provides CX insights
Reality Road (Frustration)	Difficult to understand agent due to intonation/accent 53%
AI Road (Solution)	Voicebots quickly solve common customer problems and provide CX insights.
Reality Road (Frustration)	Phone menu has very old or dated navigation 48%
AI Road (Solution)	Voicebots and IVRs help guide customers, while speech-to-text — enhanced with natural language understanding and accurate transcription — quickly solves common customer problems and provides CX insights.

Q: How frustrating is experiencing each of the following types of communications issues with businesses or service providers?

**65% EXPECT DELAYS
LONG WAIT TIMES**

CRM Integration

Reality Road (Frustration)	No way to speak to customer service via voice/phone 60%
AI Road (Solution)	AI-powered intelligent agents use enhanced natural language understanding, plus sentiment analysis, to route customers to live agents as needed. AI extracts data from CRM to ensure verification and quickly provide customer history, so agents have the full context before starting the call.
Reality Road (Frustration)	Providing personal information multiple times within one call/session 55%
AI Road (Solution)	AI extracts data from CRM to ensure verification and quickly provide customer history.
Reality Road (Frustration)	Don't know your history or background of recurring issue 53%
AI Road (Solution)	AI extracts data from CRM to ensure verification and quickly provide customer history.
Reality Road (Frustration)	Conversation from one channel not captured in different channel 52%
AI Road (Solution)	AI extracts customer data from CRM to provide context to staff.

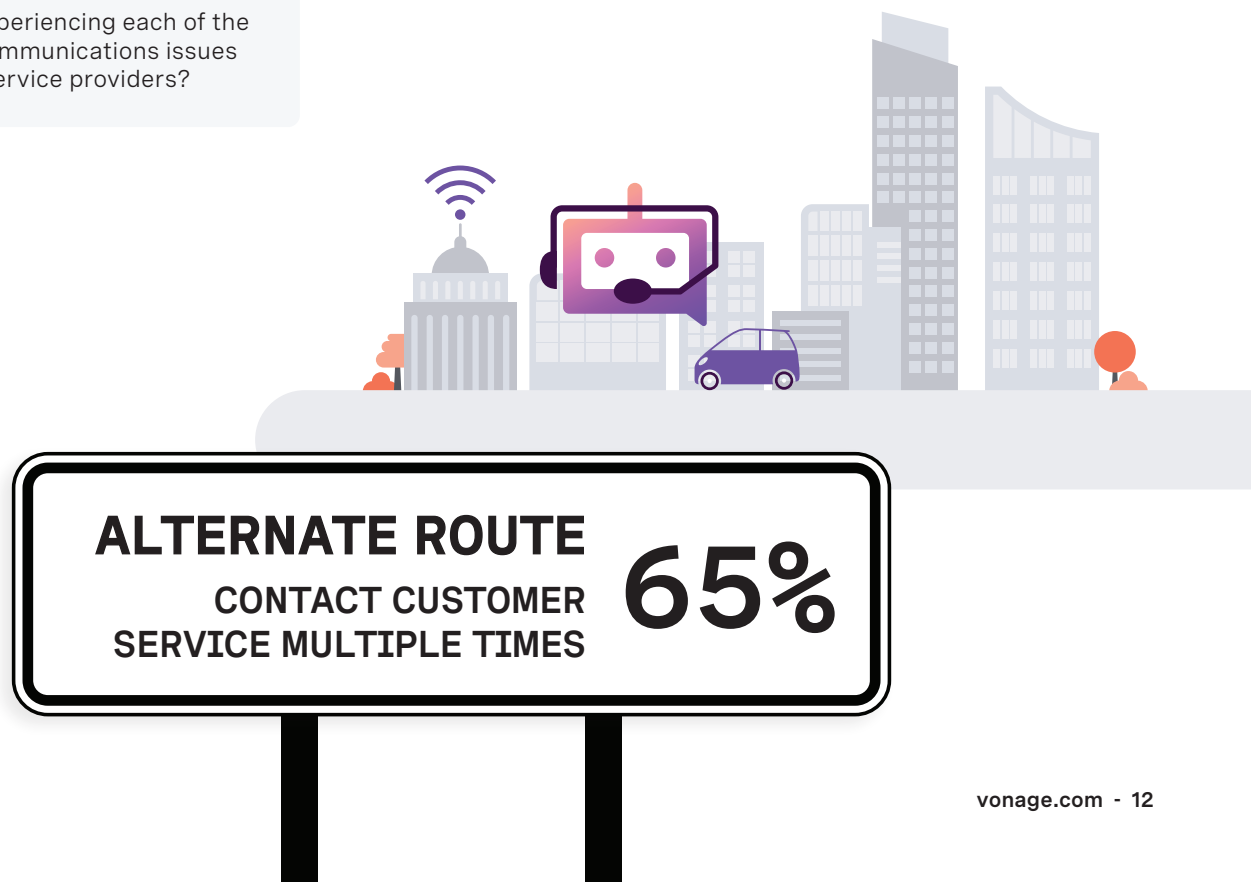
Q: How frustrating is experiencing each of the following types of communications issues with businesses or service providers?



AI Virtual Assistant and Live Agent Assist

Reality Road (Frustration)	Contacting customer service multiple times to resolve issue 65%
AI Road (Solution)	AI virtual assistant delivers enhanced self-service, initiates initial triage to route customers to the appropriate person, and ensures high volumes of inbound calls are addressed during peak business hours or busy seasonal periods.
Reality Road (Frustration)	Describing issue to multiple agents, being transferred multiple times 63%
AI Road (Solution)	Skills-based routing connects customers with an agent best suited to handle the call.
Reality Road (Frustration)	Customer service is not available in preferred language 55%
AI Road (Solution)	An AI virtual assistant engages callers in natural language
Reality Road (Frustration)	Difficult to hear agent clearly due to background noise 57%
AI Road (Solution)	An AI virtual assistant engages callers in natural language. Also, AI can filter out background noise for a clear call experience

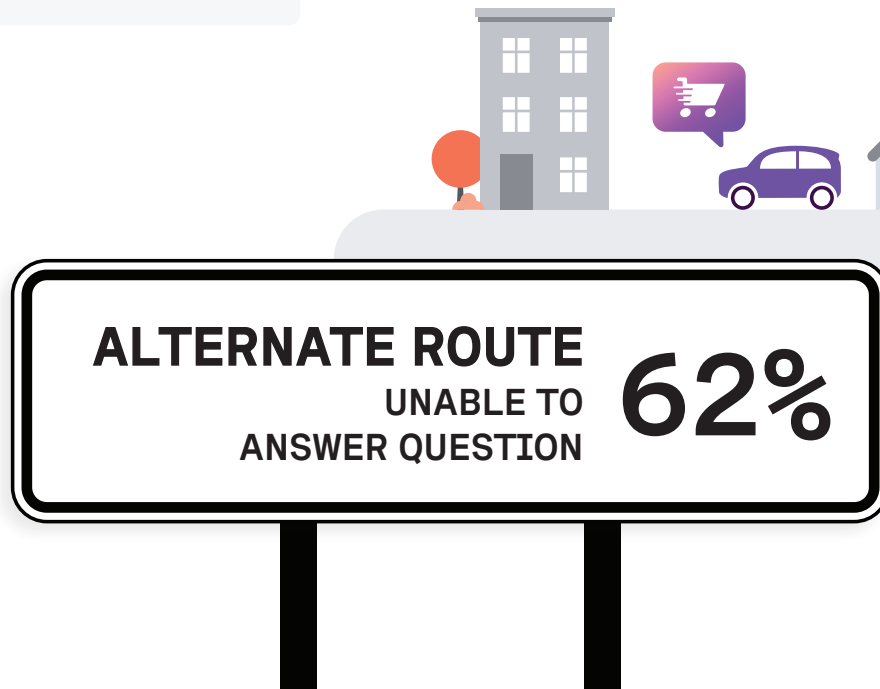
Q: How frustrating is experiencing each of the following types of communications issues with businesses or service providers?



Conversational Marketing and Commerce

Reality Road (Frustration)	Unable to answer your question, right person isn't available 62%
AI Road (Solution)	A conversational marketing workflow: • Adds information, automation, and self-service to conversations: e.g., provide front-end FAQs, authenticate users, and authorize payments • Offers another option for customers to engage, share insights, or request follow up • Uses a message campaign builder to enable one-to-one messaging at scale
Reality Road (Frustration)	No way to respond to text message or email notification 56%
AI Road (Solution)	Conversational marketing using conversational AI enables two-way messaging to engage customers in the moment in the channel of their choice. A message campaign builder enables one-to-one messaging at scale.
Reality Road (Frustration)	Want quick information via chat/messaging but phone is only option 42%
AI Road (Solution)	AI-powered intelligent agents (chatbots) can quickly engage customers and answer questions or route to a live agent. Conversational marketing workflow adds information, automation, and self-service to conversations: e.g., provide front-end FAQs, authenticate users, and authorize payments.

Q: How frustrating is experiencing each of the following types of communications issues with businesses or service providers?



24/7 and Staff Coverage

Reality Road (Frustration)

Customer service is not available 24/7 | 49%

AI Road (Solution)

AI operates 24/7 through virtual assistants and conversational marketing and commerce — with a focus on information, automation, and self-service — to engage customers with minimal human involvement.

Reality Road (Frustration)

Self-service support is not available | 47%

AI Road (Solution)

AI operates 24/7 through virtual assistants and conversational marketing and commerce — with a focus on information, automation, and self-service — to engage customers with minimal human involvement.

Q: How frustrating is experiencing each of the following types of communications issues with businesses or service providers?



Want to learn more?

See [AI: Two-Way CX Traffic](#).



Bottom-Line Impact

Customer reactions to negative and positive CX

Key takeaways

- 75% of consumers will stop buying products/services as a result of repeated communications issues with businesses/service providers.
- The impact is strong across markets and most pronounced in LATAM.
- Older consumers (ages 40+) and males are more likely to react to communications problems.
- 46% of customers are likely to take their business elsewhere after a negative experience.
- 48% of customers ONLY NEED ONE OR TWO BAD EXPERIENCES BEFORE THEY LEAVE.

Frustrating CX	Great CX
Give negative feedback on survey 39%	57% Give positive feedback on a survey
Tell friends/family 42%	53% Tell friends and family
Switch to other companies/providers 46%	52% Become more loyal to company/provider
Report business/provider to consumer protection agency 18%	35% Purchase additional products
Post to social media/online review 21%	30% Post to social media/online reviews
Complain to company/provider 44%	24% Contact business to provide compliments
Refuse to pay 10%	23% Become willing to pay a little more
Lose temper/get angry/yell 17%	

Q: Overall, how likely would you be to STOP BUYING from a business or stop using their services as a result of repeatedly experiencing these types of communications issues?

Q: How many bad experiences does it take for you to seriously consider leaving or switching to another business?

Q: When you are FRUSTRATED in your communications with a business or service provider, what do you typically do?

Q: On the other hand, when you have a GREAT customer experience with a business or service provider, what do you typically do?



Customer Service/Support

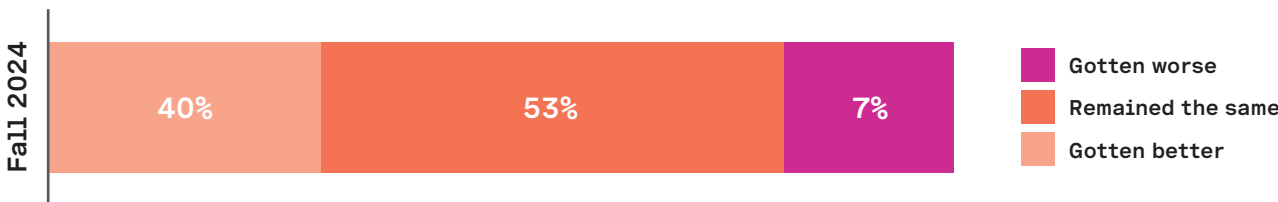
Overview

- About 40% of consumers continue to feel customer service and support has improved.
- Most consumers in India, Indonesia, China, Brazil, and Mexico feel customer service/support has improved. In other markets, most consumers claim it has remained the same in the past year.
- Over 50% who feel support has improved cite faster problem resolution, easier contact, and improved information through messaging as reasons for improvement.
- Consumers mentioned an increase in better automated phone/chat support.
- Reasons why service and support have improved vary by country. Among those claiming improved service, about 50% of U.S., Brazil, and India consumers mentioned more knowledgeable representatives.

Next steps

- If every company was a model of effective customer communications and positive CX — then reports and guides on the topics wouldn't exist. The embarrassing customer frustrations must stop. It's time to change your direction and hit the AI Road.
- Carefully review the report to identify popular channels and add them accordingly. Lean into AI for the quick wins like information, automation, and self-service.

In Past Year, Customer Service/Support Has ...



How Customer Service/Support Has Improved

Faster problem resolution	57%
Easier to contact support	55%
Better info available through messaging	51%

Q: In the past year, has the overall service and support companies offer to their customers...?

Q: How has service and support from companies gotten better?



How Vonage Can Help

Vonage is a wholly-owned subsidiary of Ericsson, an industry leader in 5G networks. The Vonage Communications Platform brings a unique combination of communications APIs, contact center, conversational marketing, AI, and more.

Vonage Communications APIs help you quickly build best-in-class communications solutions at scale with programmable messaging — including RCS, SMS, WhatsApp etc. — plus voice, video, and more.

Vonage Contact Center (VCC) enables your customer service agents to deliver a secure conversational CX through a configurable, straightforward, telephony-agnostic platform.

Vonage AI delivers AI capabilities across the portfolio, including intelligent assistants, easy transcription, and analysis. It also features **Vonage AI Studio**, a low-code conversation designer that empowers developers and non-developers to create and deploy AI intelligent agents that operate in natural language on any channel — to deliver great customer engagement experiences.

Vonage Protection Suite is a comprehensive set of tools that simplify end-to-end communications and account fraud protection. Mix and match tools to meet your needs and guard your business against fraud.

Vonage Business Communications (VBC), our unified communications solution, integrates with VCC so your agents can collaborate with experts across your entire organization.

VBC and **VCC integrate with Salesforce** to enable features such as advanced routing to the best available associate or agent, customized dashboards, and more.

Vonage Fusion, our CC + UC + AI combined solution, enables engaging customer and employee experiences and helps increase collaboration across teams.

Vonage Conversational Marketing and Commerce enables businesses to create AI-powered omnichannel experiences to deeply engage prospects and customers with automated and live agent personalized conversations.

Get Started

Vonage Communications APIs
[Learn more](#) | [Contact us](#)

Vonage Contact Center
[Learn more](#) | [Contact us](#)

Vonage Business Communications
[Learn more](#) | [Contact us](#)

Vonage Fusion
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Vonage Conversational Marketing and Commerce
[Learn more](#) | [Contact us](#)

Methodology

The findings reported were sourced from August to September 2024 from in-market research panels — across 17 global markets — comprising 7,077 customers, ages 18–74. The survey was conducted in each market's leading language or languages, and the average completion time was 15 minutes. To ensure spreads in age, gender, and household income, quotas were set in each market, with the reported data weighted to represent actual age/gender proportions among the target populations. Panel members who self-identified as being the last among their friends and family to adopt new technology — approximately 5 percent — were omitted. Vonage was not identified as the survey's sponsor.

CX Carpool With RCS + AI

Because messaging/texting is a static, one-way affair — it takes time to cultivate a customer relationship. The business must actively participate in the exchange, wait for a response, and then possibly direct the customer to call, tap, or click for next steps. Rich Communication Services (RCS) can turn an app or mobile device into an enhanced interactive experience with:

- Personalized, branded, and conversational messages
- Rich media support for images, videos, and GIFs
- In-the-moment participation with interactive buttons and suggested replies
- Automated AI-generated bots
- Real-time data

Customers love the interactive power, with:

- 72% more likely to purchase online if they can ask questions in real-time
- 74% more likely to engage with a brand through RCS
- 35x more likely to read RCS messages than emails

Source: [Google for Developers newsletter](#)

RCS helps with automation and customer engagement, which can further enhance retargeting efforts. And it's easier to update customers or request feedback.

Step on the gas and step up your CX strategy with RCS.



Patient Experience

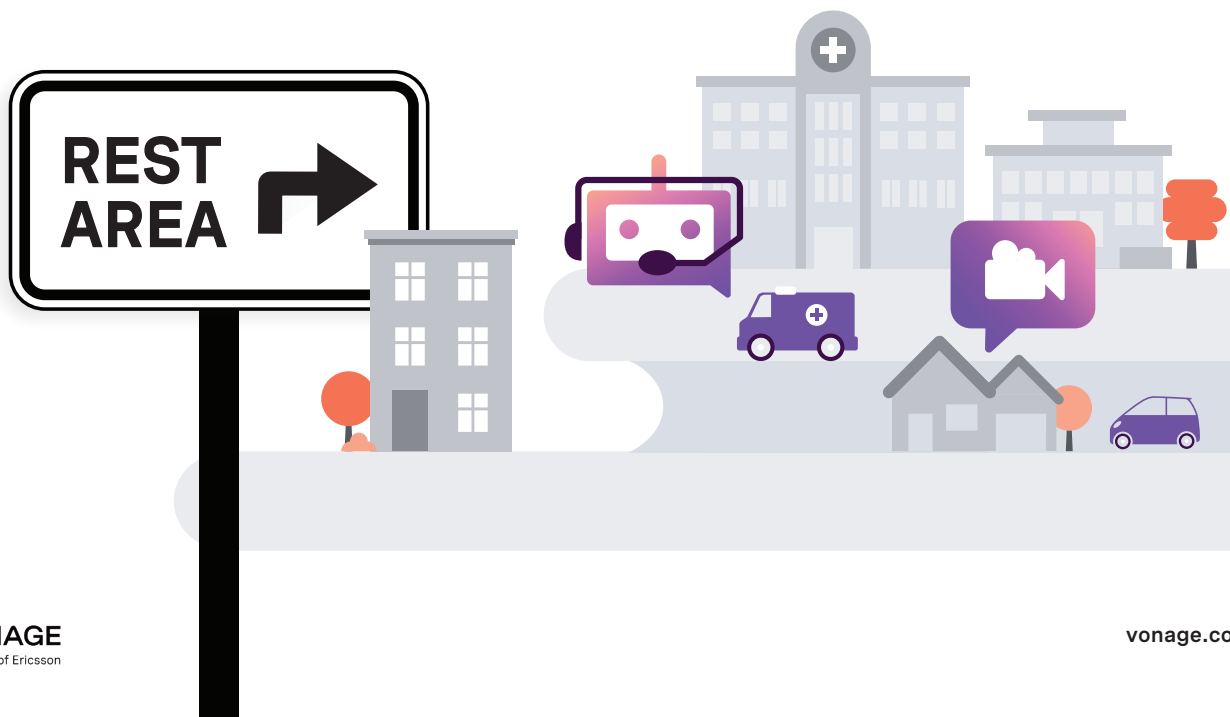
Every patient interaction impacts the overall care experience. But often, patients can't have an experience because they've never made an appointment. Communications APIs that embed voice, SMS, and video collaboration are a bonus for patients and staff. For example, APIs can help healthcare providers:

- Complement and extend in-office care with personalized virtual appointments, as well as remote condition monitoring and quick responses to urgent health needs.
- Deliver a secure, timely, personalized patient experience across whatever channel patients prefer.
- Authenticate patients, consult virtually, message medical staff and patients to keep them informed and on time, offer secure live video sessions, and more.
- Get a more holistic view of a patient's health status with AI-enabled programmable communications.

In addition, contact center solutions that integrate with CRMs can deliver experiences tailored to patient preferences. Now healthcare providers, payers, and pharma and device manufacturers can:

- Route patients to the best-skilled doctors or nurses to address their needs.
- Transform the patient experience through self-service and chatbots, which resolves cases with automated workflows and task filtering.
- **Leverage AI insights to:**
 - Review prescribing habits and medication adherence.
 - Understand complex interactions between a provider, patient, and payer.
 - Monitor the effectiveness of patient, sales, and marketing programs.

Take the patient journey to the open road with AI-enhanced communications APIs and contact center solutions.



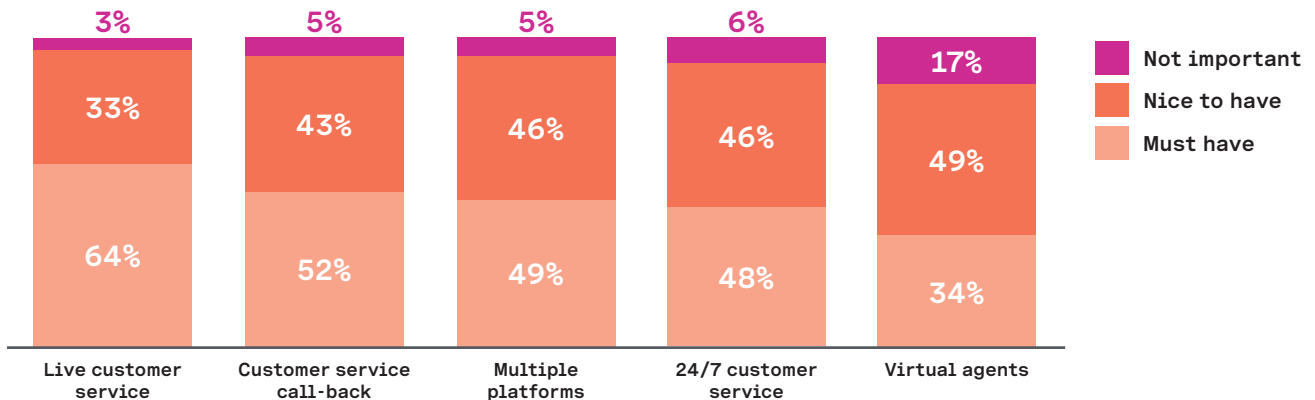
RECOMMENDED STOP

AI: Two-Way CX Traffic

Customers continually rely on AI to fix issues and create a better experience — which can directly lead to more positive reactions. Pull over and see the use cases where AI is growing in popularity:

- Provide 24/7 service
- Resolve login issues (popular in the financial services sector)
- Reset passwords
- Guide customers through product recommendations and sale
- Book dining and event reservations
- Process returns and exchanges
- Provide order confirmation and tracking
- Send customer feedback surveys
- Route requests to support teams
- Identify cross-sell or upsell opportunities

Importance for winning/keeping satisfied customers



Customers are comfortable with AI

Key takeaways

- Live customer support is traditional and familiar, and nearly 65% feel "easy access" to this support method is important. AI-enabled tools need to create the same "easy access" to gain customer acceptance, despite these not being live methods.
- The ability to receive callbacks, a wide variety of communications options, and 24/7 customer service are "must haves."
- There is a strong desire for virtual agents.

Q: To win your business and/or keep you as a satisfied customer, how important is it for a business or service provider to offer...?

83% USE AI-ASSISTED TOOLS

AI attitudes and experiences

Consider these methods your AI front-line to meet and engage customers:

AI-powered chatbots are rules-based software solutions designed to replicate conversations, either through text or speech.

AI-powered virtual assistants or agents, as the name implies, help customers with various tasks. These employ conversational AI to start the customer conversation, evaluate the need, and then initiate the appropriate action.

Both use AI smarts to engage customers in natural language, use sentiment analysis to escalate issues, collect metrics, and more.

AI-powered chatbots

AI-powered virtual assistants or agents

Q: What is your overall opinion about companies using more artificial intelligence (AI) tools to improve the customer experience?

Q: Which of the following have you experienced or used in the past few months?

Key takeaways

- Most consumers have positive feelings about companies using AI tools to improve the customer experience.
- 83% of consumers report recent use of some AI-assisted tools, with a sharp increase in AI-powered search engines and AI chat programs.
- Positive sentiment about companies using AI tools to improve the customer experience is at least moderately strong across markets.
- Sweden has a differing view, where 51% believe that AI will have both a positive and negative effect.*
- Australia also has a lower expectation, perhaps due to only 25% of companies viewing their current AI adoption as advanced.**
- Experience with AI-assisted tools mostly reflects the level of positive sentiment in each market.
- U.S. trails in experience with AI-assisted messaging support.

*Source: *Boston Consulting Group, "Accelerating Australia's AI Adoption"*

**Source: *IT Brief Australia, "Zendesk report: AI to revolutionise Australian CX by 2027"*

AI-powered support tools and data security

Key takeaways

- 75% of consumers are concerned about the security of their personal data when using AI-powered support tools, including 30% who are “very concerned.”
- Most are comfortable with AI support tools handling more complex and sensitive customer service issues, but fewer than 25% are “very comfortable” with this idea.
- Consumers in Singapore, India, Spain, and Mexico are the most concerned about the security of personal data when interacting with AI-powered customer service tools. The concern is lowest in Italy while Germany, Sweden, and Brazil are also below average.
- Comfort with these tools handling complex and sensitive customer service issues is strongest in India, Indonesia, China, and Mexico. Japan and Germany consumers are the least comfortable.

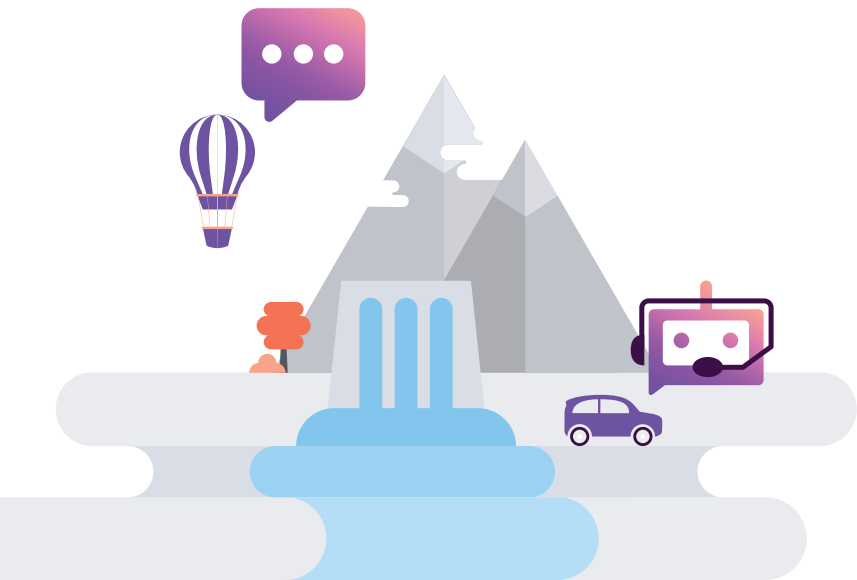
AI-powered support tools handling complex/sensitive issues (%)



Comfort with AI-powered support tools and data security (country)

	TOTAL	NAM		LATAM		UK	EMEA					APAC						
		US	Brazil	Mexico	UK	France	Germany	Italy	Spain	Sweden	Australia	China	India (N)	India (S)	Indonesia	Japan	Singapore	South Korea
Comfortable (Net)	69	62	74	81	61	63	59	70	61	48	61	81	84	90	86	55	74	72
Very comfortable	22	21	24	35	15	15	14	14	21	8	10	28	49	44	34	5	17	13
Somewhat comfortable	48	40	50	46	45	48	45	56	41	40	51	53	34	46	52	50	57	59

Indicates higher/lower than other countries, with 90% confidence that these populations are truly different on these measures.



- Q: How concerned are you about the security of your personal data when interacting with AI-powered customer service tools?
- Q: How comfortable are you with AI-powered support tools such as virtual assistants and chatbots handling more complex and sensitive customer service issues?

AI channel preferences

Overview

- Most consumers are likely to try AI-powered support tools in return for faster responses — for example, shorter wait times — including over 25% who are “very likely” to opt for AI-assisted help.
- Most others simply feel “neutral” — with 12% “unlikely” to try this alternative.
- Willingness to use AI-powered support tools for faster response is strongest in India, China, Mexico, Indonesia, and Brazil. Sweden consumers are the least interested. And Japan and the UK are also below average.
- Messaging apps and website chat are the most widely preferred AI-powered support channels.
- Preferences for specific channels are generally higher in markets with higher willingness to use AI support tools. Interest in using messaging apps is highest in markets with strong existing usage for general communications with businesses.

Next steps

- When it comes to augmenting your customer support with AI, first define and prioritize the customer support challenges for your business. Start small, test, and evaluate the results before moving on to the next digital engagement use case.
- As you determine these priorities, consider partnering with trusted CX experts — such as conversation designers — to help deliver elevated digital engagement.

Preferred Channels for AI-Powered Support Tools

Messaging apps	44%
Website chat	39%
Email	30%
Company's mobile app	28%
SMS/text	26%
Voice call	26%

Q: What channels do you prefer for interacting with AI-powered support tools such as virtual assistants and chatbots?

- Messaging apps, 44%
- Website chat, 39%
- Email, 30%

Q: For faster response (shorter wait times), how likely would you be to try using AI-powered support tools instead of live human support representatives the next time you need help?

- Likely (net), 66%
- Very likely, 27%
- Somewhat likely, 39%

OVER 25%
OPT FOR AI-ASSISTED HELP

Future AI-powered support tools

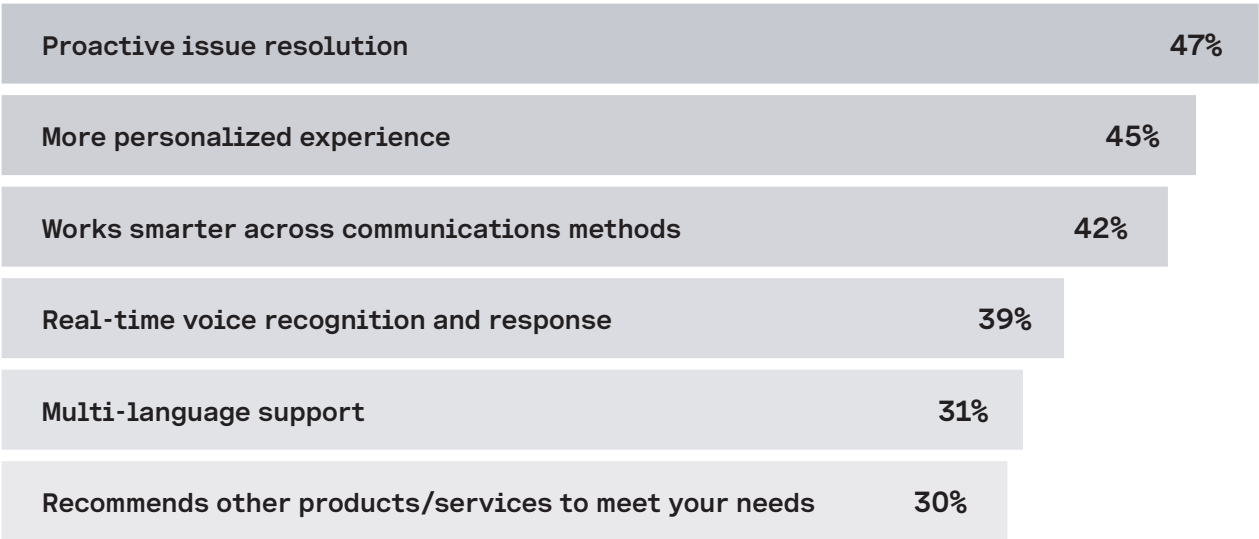
Overview

- Proactive issue resolution and more personalized experiences are the most-preferred applications for future AI-powered customer support tools.
- More seamless performance across communications methods and real-time voice recognition/response are also widely requested — and multi-language support and product recommendations trail.
- The lack of strong preferences for any specific application or enhancement likely indicates consumers are still unclear about the potential benefits of AI-powered support.
- Preferences for specific features in future AI-powered customer support tools are strongest in most APAC countries (except Australia and Japan) and LATAM markets (Mexico and Brazil).
- Japan and Sweden trail overall in interest and preference for most of the specific features.
- Country-level interest largely reflects overall tech orientation in communications with businesses.

Next steps

- AI is evolving at a rapid rate, so it's important for businesses to stay updated on market and technology developments — those are table stakes to remain competitive.
- For example, chatbots, voicebots, intelligent agents, knowledge/agent assist, generative AI, and large language models (LLMs) are just a few advances that are completely changing the contact center and customer service landscape.

Additional Features for Future AI-Powered Support Tools



Q: What additional features would you like to see in AI-powered customer support tools in the future?

- Proactive issue resolution, 47%
- More personalized CX, 45%
- Smarter across communications methods, 42%
- Real-time voice recognition and response, 39%

Best uses for AI-powered support tools

Overview

- At least 50% of consumers feel AI-powered support tools are best suited for resolving simple issues and answering FAQs. Nearly 40% view these tools as useful for generating reports/summaries.
- Interest in being helped with advanced inquiries, getting product recommendations, or creating more personalized experiences trails.
- These results suggest consumers are not effectively envisioning AI usage beyond the limited experiences they may have already had. That is, consumers have difficulty understanding AI benefits until they see it in action.
- Consumers in India, China, Indonesia, Singapore, Brazil, and Mexico are the most enthusiastic about using AI-powered support tools across most situations. Interest is lowest in Japan and Sweden.
- U.S. consumers are more skeptical than most about using these tools to handle advanced support inquiries.
- Country-level interest largely reflects overall tech orientation in communications with businesses.

Next steps

- AI is evolving at a rapid rate, so it's important for businesses to stay updated on market and technology developments — those are table stakes to remain competitive.
- For example, chatbots, voicebots, knowledge or agent assist, generative AI, and large language models (LLMs) are just a few advances that will completely change the contact center and customer service landscape.

Preferred Channels for AI-Powered Support Tools

Resolving simple issues	54%
Answering frequently asking questions	50%
Generating reports or summaries	39%
Handling advanced inquiries	31%
Providing product recommendations	31%
Providing personalized customer experiences	30%

Q: How do you feel AI-powered support tools such as virtual assistants and chatbots are MOST useful in customer service?

- Simple issues, 54%
- Answering FAQs, 50%
- Reports/summaries, 39%
- Advanced inquiries, 31%

AT LEAST 50%
FEEL AI CAN HELP WITH
SIMPLE ISSUES & FAQs

Verification

AI and verification: Gently apply brakes

Customers crave comfort. This is true of customer verification, where over 71% of consumers feel more confident when shopping on sites that use online authentication. They are comfortable using codes sent by SMS/text, email, and phone call, not to mention authentication apps. The key is ease of use and scalability.

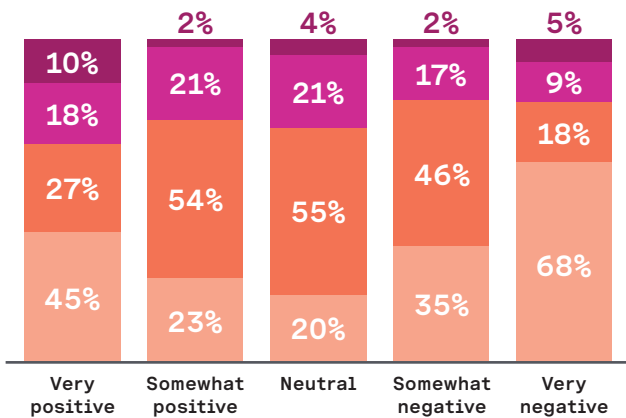
AI-enhanced communications APIs can help with automation — such as confirming the legitimacy of a phone number or SIM card, monitoring global two-factor authentication steps and sending real-time alerts, assessing SMS and voice traffic, and more. These all work in the background, with minimal customer interaction ... so they spend more time on your site to shop and do business.

AI interest and AI concerns

Key takeaways

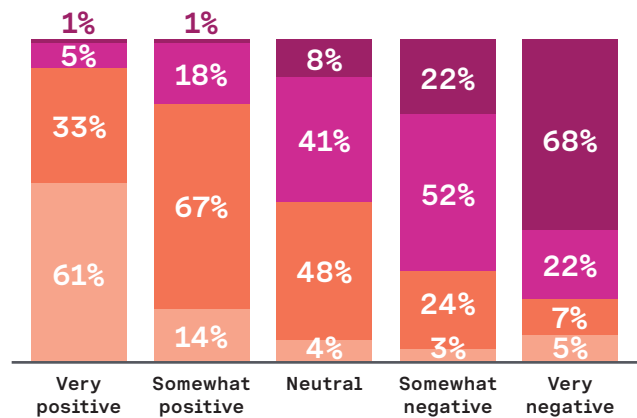
- Even consumers with the most positive attitudes toward using AI to improve CX have significant concerns about data security. They are nearly as concerned as “very negative” consumers.
- General AI positivity is very closely correlated with comfort in using AI-powered support tools to handle sensitive issues. That is, “very positive” customers are mostly “very comfortable” — and vice versa.

Concern about personal data security when using AI-powered support tools



■ Not at all concerned / Not at all comfortable
■ Somewhat concerned / Somewhat comfortable

Comfort with AI-powered support tools handling complex/sensitive issues



■ Not very concerned / Not very comfortable
■ Very concerned / Very comfortable

Q: What is your overall opinion about companies using more artificial intelligence (AI) tools to improve the customer experience?

Q: How concerned are you about the security of your personal data when interacting with AI-powered customer service tools?

Q: How comfortable are you with AI-powered support tools such as virtual assistants and chatbots handling more complex and sensitive customer service issues?

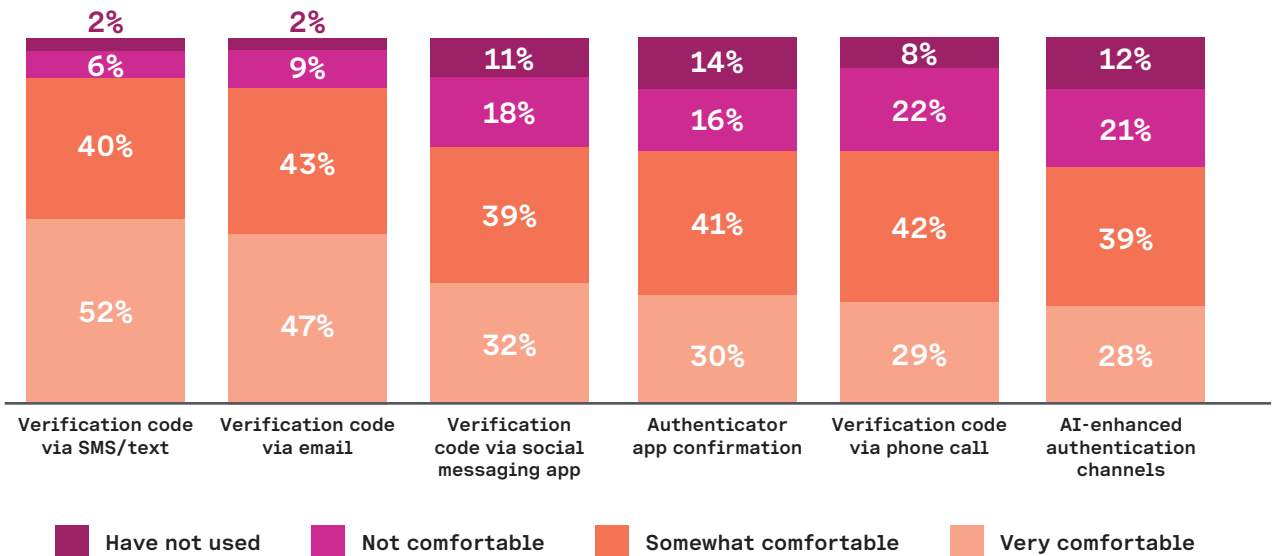
OVER 71%
MORE CONFIDENT WITH
SITES THAT USE ONLINE
AUTHENTICATION

Comfort with authentication methods

Key takeaways

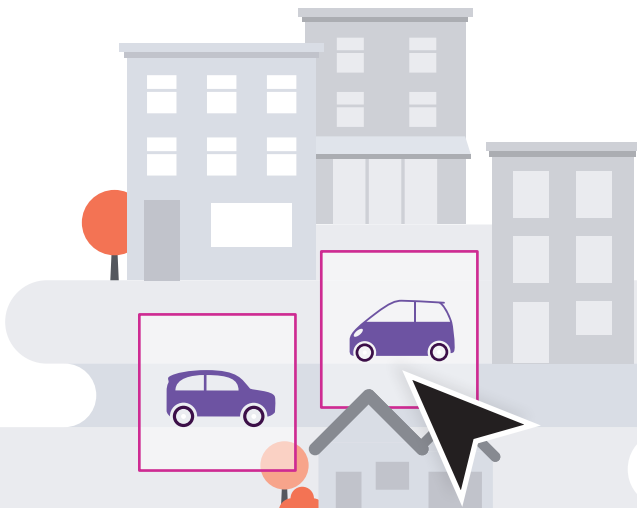
- Most consumers are “very comfortable” with verification codes sent by SMS and nearly 50% are “very comfortable” with verification codes sent by email.
- Usage of the authentication methods is nearly universal.
- Usage and comfort are lower for verification through social messaging apps, authenticator apps, phone calls, and AI-enhanced channels — with about 30% “very comfortable” with each of these methods.

Comfort with each authentication method



Q: How comfortable are you using each of these authentication methods when making online purchases?

CUSTOMERS DON'T WANT TO IDENTIFY CARS, STAIRS, OR TRAFFIC LIGHTS



Verification methods usage

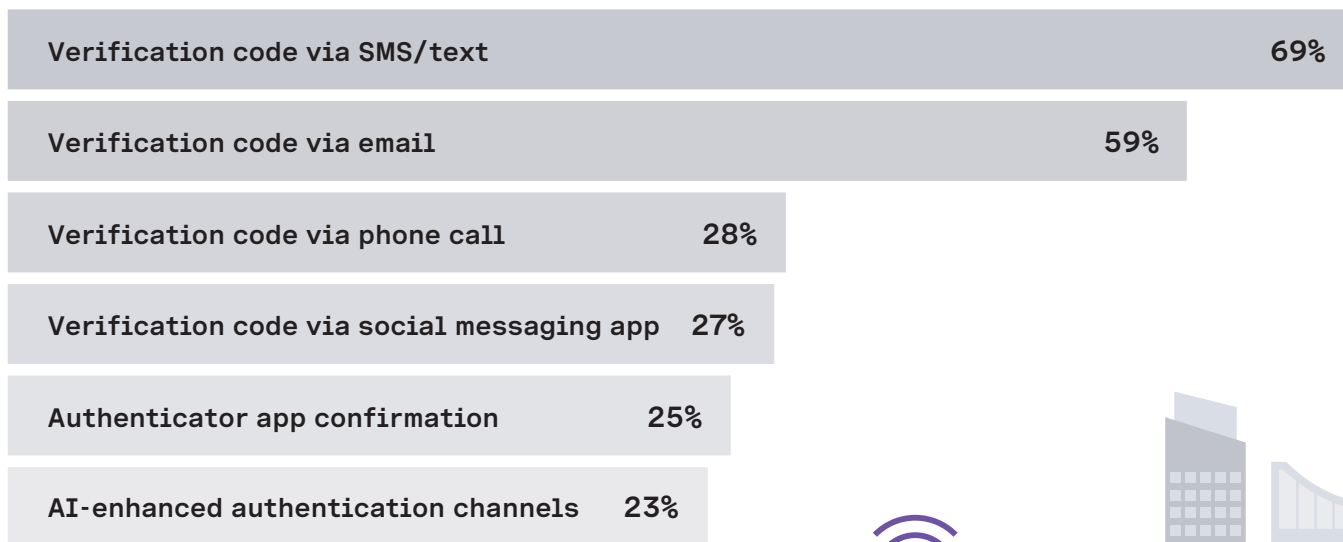
Overview

- Nearly all consumers have experienced verification with businesses/service providers.
- Codes delivered via SMS or email are the dominant verification methods despite decreasing this wave.
- Codes via phone calls, codes via messaging apps, authenticator apps, and AI-enhanced channels all have similar usage at about 25% of consumers each.
- SMS and email continue to dominate consumer verification experiences while growth of other methods is likely to be slow but steady.

Next steps

- Because consumers prefer to have an authentication method, companies need to at least offer a two-factor authentication (2FA) solution. Also focus on a strong customer experience, as most consumers don't want more than one step to verify — such as SMS. As more seamless verification methods — that automatically validate users through their mobile network — grow in popularity, consumers will find that steps involving texts or emails to be cumbersome.
- Consumers are worried about identity theft. They need to know that their information is protected, so companies must actively promote their ongoing security efforts.

Verification Methods Used with Businesses/Service Providers



Q: Which of the following VERIFICATION methods do you use with businesses or service providers (e.g., to prove your identity, confirm a device is yours, etc.)?

- Verification code via SMS/text to mobile phone, 69%
- Verification code via email, 59%
- Verification code via phone call, 28%

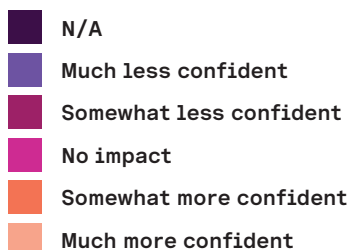
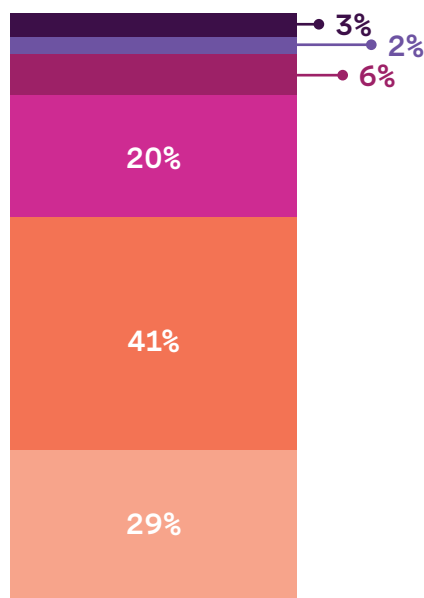


Impact of authentication

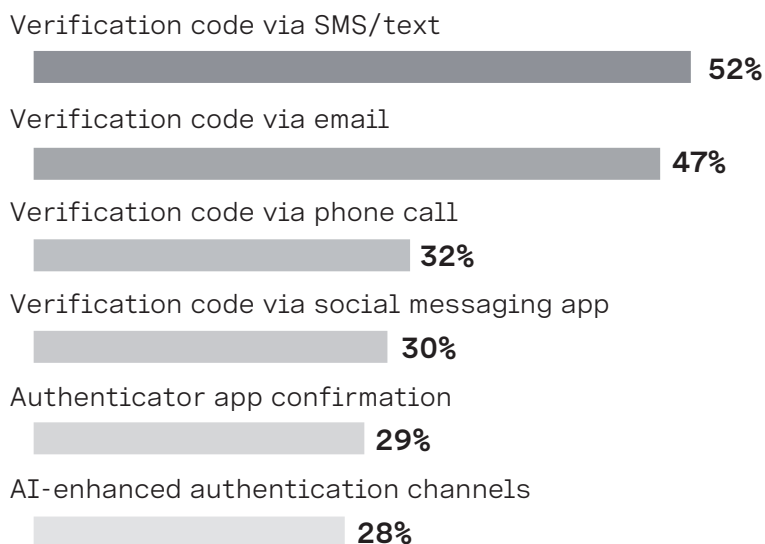
Overview

- About 70% of consumers claim authentication boosts their confidence in online purchasing, with 30% feeling “much more confident.”
- Nearly all have used online authentication and very few have negative attitudes about it.
- Confidence softens slightly – “much more confident” slips from 33% to 29% – perhaps because data breaches and other security problems continue despite consumers continuing to authenticate.
- Confidence boost from online authentication is strongest in India, Indonesia, Brazil, and Mexico. Impact is weakest in Japan, Sweden, Germany, and South Korea.
- Confidence in authentication largely reflects overall tech orientation in communications with businesses.
- Comfort with receiving codes via text/SMS and email is generally very high across markets. Comfort with other methods, including AI-enhanced authentication, varies widely.
- Consumer comfort with verification methods mirrors actual experience using SMS and email but not other methods. The relative lack of comfort with messaging, app, and AI methods could be interpreted simply as lack of exposure and not active resistance.

Impact of authentication on online purchasing



“Very comfortable” with each authentication method



Q: When online sites require authentication, how does that impact your confidence in purchasing through that site?

- More confident (net), 70%
- Much more confident, 29%
- Somewhat more confident, 41%

Q: How comfortable are you using each of these authentication methods when making online purchases? (“very comfortable”)

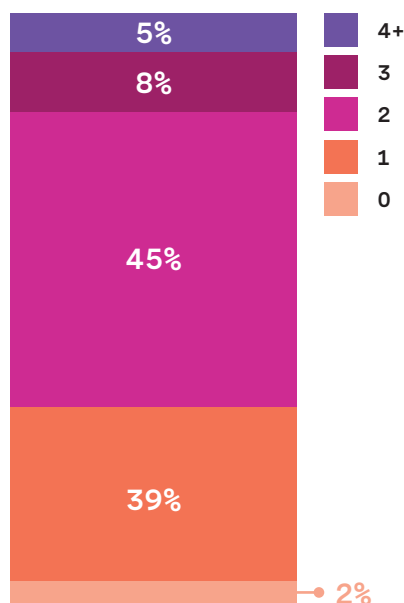
- Verification code via SMS/text to mobile phone, 52%
- Verification code via email, 47%
- Verification code via social messaging app, 32%
- Authenticator app confirmation, 30%

Authentication/security tolerance

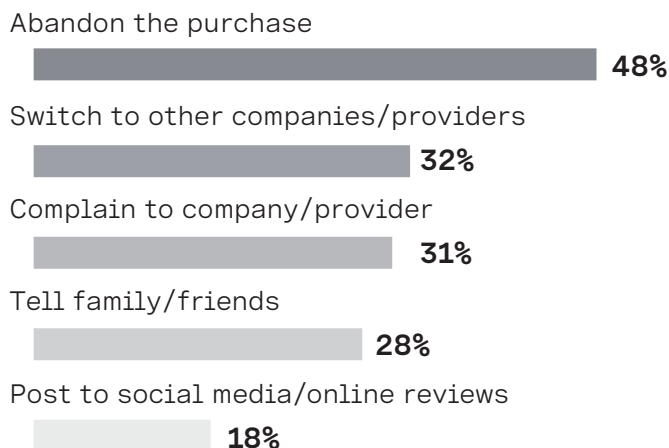
Overview

- Few customers are willing to complete more than two authentication/security steps during an online transaction; about 40% will complete only a single step.
- Nearly 50% will abandon their purchase/transaction when frustrated with authentication/security and about 33% will switch to other companies or providers.
- Authentication is crucial, but few customers are willing to complete more than two security steps (such as two-factor authentication with SMS codes). They may sometimes tolerate an additional step, but nothing more.
- India and Indonesia customers are the most tolerant of completing multiple authentication steps, as about 25% draw the line at one step. Japan, UK, and China customers are the least tolerant.
- Even the most tolerant consumers mostly still draw the line at two steps.
- Willingness to switch providers is highest in India, China, and Indonesia. In contrast, consumers in Italy, Sweden, Australia, and the UK are the least likely to take any actions when frustrated.

Number of authentication/security steps willing to complete



Actions taken when frustrated with authentication/security



Q: How many authentication/security steps (e.g., codes via SMS, verification apps, etc.) are you willing to complete when making an online transaction?

- 2 or less (net), 87%
- 1, 39%
- 2, 45%

Q: When you are frustrated with the authentication/security experience during an online transaction, what do you typically do?

- Abandon the purchase, 48%
- Switch providers, 32%
- Complain to provider, 31%

Protecting personal information

Overview

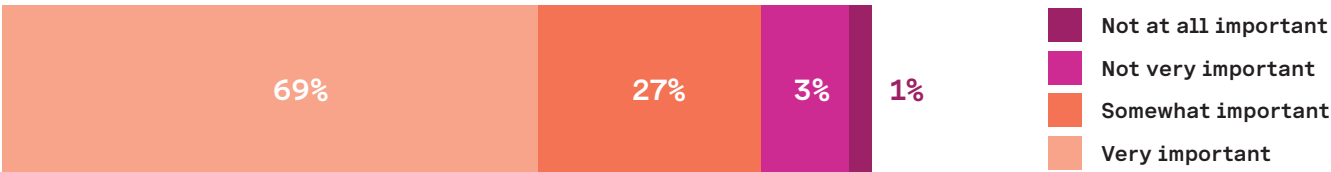
- Protection of personal information for online transactions is universally important to consumers, including nearly 70% who feel it is “very important.”
- Over 75% would likely switch brands or providers if data protection measures are not in place, including more than 40% who are “very likely” to leave.
- Protection of personal information for online transactions is very important across all markets. Japan trails other countries, but importance is still high in that market, at 90%.
- China consumers are the most likely to consider switching brands or providers if data protection measures are not in place. More than 50% in India, Indonesia, U.S., and Mexico are “very likely” to leave.
- Protecting personal information is a basic, entry-level requirement – not a competitive advantage. As a result, no or weak protection is a business-killer around the world.

Will take business elsewhere if measures NOT in place (%)

	TOTAL	NAM	LATAM		UK	EMEA					APAC							
		US	Brazil	Mexico	UK	France	Germany	Italy	Spain	Sweden	Australia	China	India (N)	India (S)	Indonesia	Japan	Singapore	South Korea
Likely to Leave (Net)	78	82	57	80	80	69	77	82	72	69	79	92	87	81	86	69	79	80
Very likely	43	55	36	52	43	26	38	42	38	36	43	44	59	54	57	38	42	33
Somewhat likely	34	27	21	28	37	43	39	39	35	33	36	48	28	28	29	31	37	47

Indicates higher/lower than other countries, with 90% confidence that these populations are truly different on these measures.

Importance of having data-protection measures in place



Q: When performing online transactions, how important is it that businesses have measures in place to protect your data and personal information?

- Important (net), 96%
- Very important, 69%
- Somewhat important, 27%

Q: How likely are you to take your business elsewhere if a business does NOT have measures in place to protect your data and personal information?

- Likely to leave (net), 78%
- Very likely, 43%
- Somewhat likely, 34%

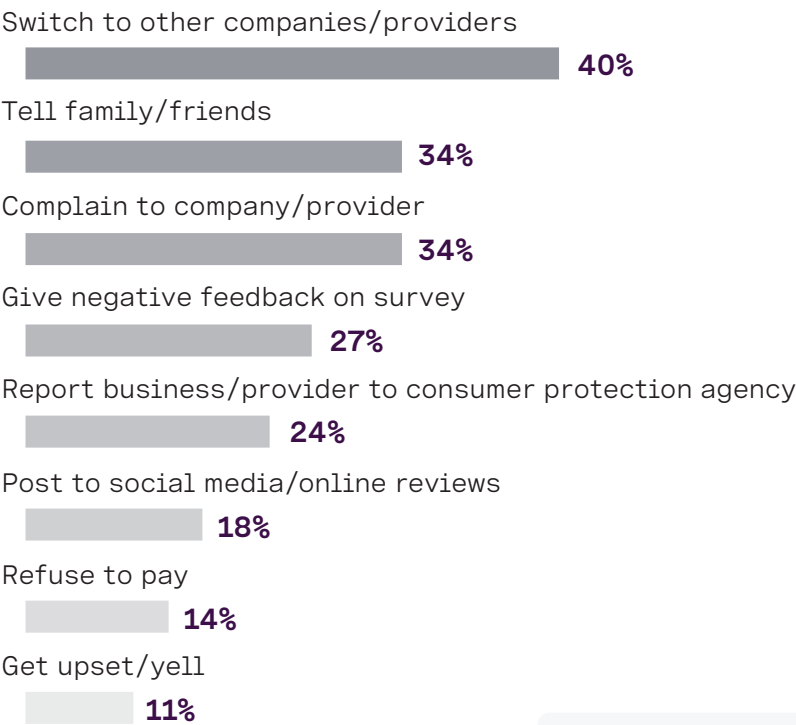


Data breach: Personal information NOT exposed

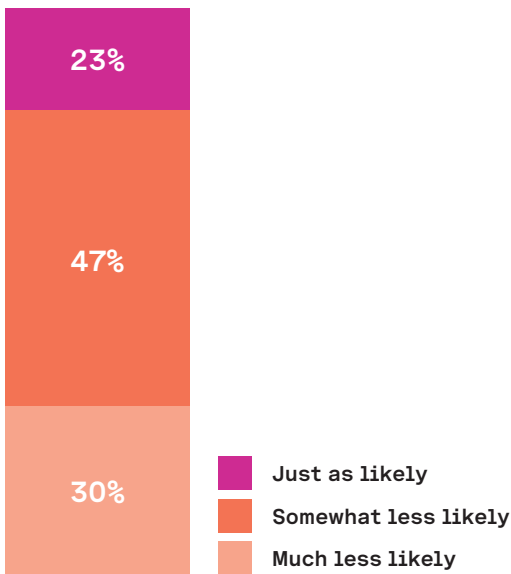
Overview

- Over 75% of consumers are less likely to stay with providers that experience an online data breach, even if customer personal information is not exposed.
- Switching providers is the most likely outcome, along with telling friends and family plus complaining to the company or provider.
- The negative impact of online data breaches — even if personal information is not exposed — is high across markets and strongest in Indonesia and Brazil. U.S. and South Korea consumers are slightly more forgiving, but most are less likely to stay with those providers.
- Consumers in LATAM and several EMEA markets are the most likely to take post-breach action.
- Any data breach is a business-threatening event, even if personal information is not widely exposed.

Actions taken after data breach - personal info NOT exposed



Continue working with business after data breach - personal info NOT exposed



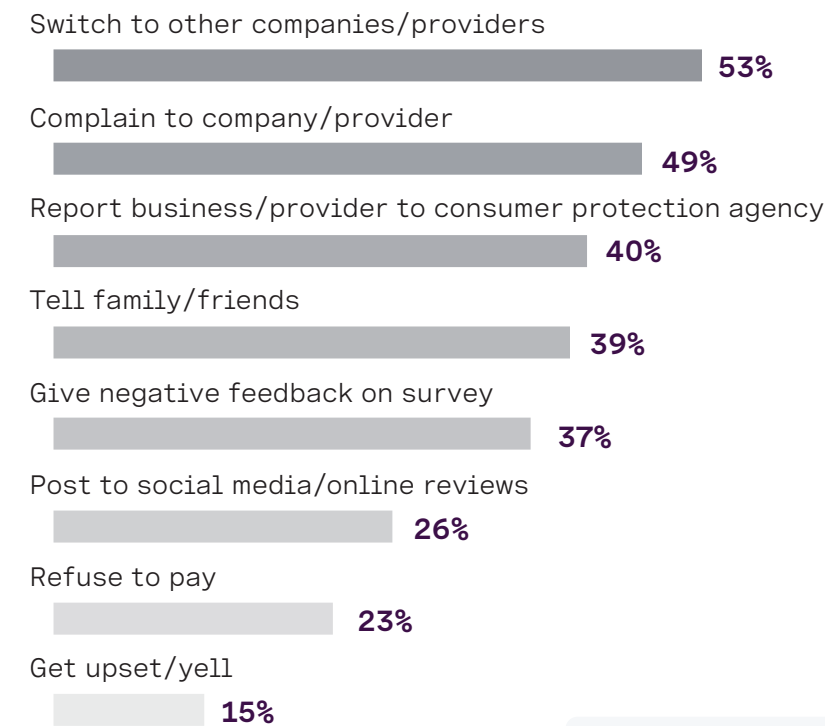
- Q: If a business you transact with online has a general data breach (but your personal information is not exposed), how more or less likely are you to continue working with that business in the future?
- Less likely to stay (net), 77%
 - Much less likely, 30%
 - Somewhat less likely, 47%
- Q: If a business you transact with online has a general data breach (but your personal information is not exposed), what actions are you likely to take?
- Switch providers, 40%
 - Tell family/friends, 34%
 - Complain to provider, 34%

Data breach: Personal information IS exposed

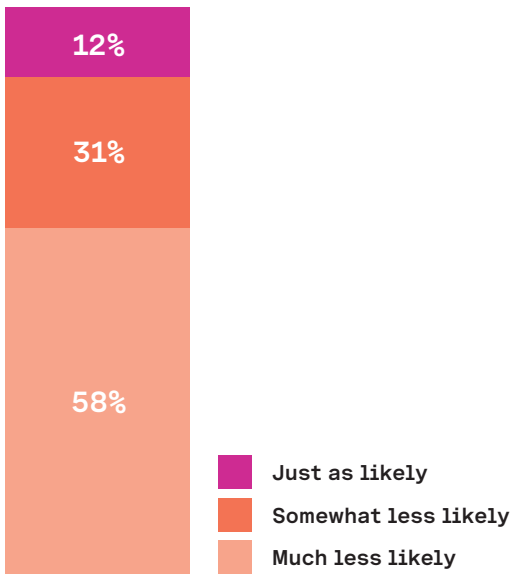
Overview

- Nearly 90% of consumers are less likely to stay with providers that experience an online data breach in which their personal information is exposed.
- Switching providers is the most likely outcome along with complaining to the company/provider. About 40% claim they would report the business to a consumer protection agency.
- The negative impact of online data breaches — with personal information exposed — is very high, especially in Brazil and Mexico. Across most markets, at least 50% are “much less likely” to stay with those providers.
- Across countries, nearly all consumers are likely to take post-breach action. Japan trails but 80% are still likely to act.
- Around the world, data breach with personal information exposure puts a severe strain on customer relationships.

Actions taken after data breach - personal info IS exposed



Continue working with business after data breach - personal info IS exposed



Q: If your personal information IS exposed, how more or less likely are you to continue working with that business in the future?

- Less likely to stay (net), 88%
- Much less likely, 58%
- Somewhat less likely, 31%

Q: If your personal information IS exposed, what actions are you likely to take?

- Switch providers, 53%
- Complain to provider, 49%
- Report to agency, 40%

Appendix

Current Communications by Country

Key takeaways

- **APAC**
 - APAC is the most heterogeneous region. India (North and South) and Indonesia consumers are among the most active communicators in the world, with very high usage of mobile, non-SMS messaging apps, and phone-call apps with businesses. In contrast, Japan consumers are among the least enthusiastic globally, with low usage of nearly all communications methods. Australia, China, and South Korea have relatively low usage of messaging and phone-call apps but are mostly average in other ways. Singapore stands as the only globally average APAC market.
- **EMEA**
 - EMEA is somewhat diverse (though not as much as APAC). Generally, these countries reflect global averages, but with minor exceptions. For example, France is relatively strong in SMS and Sweden is below average in phone-call apps.
- **LATAM**
 - Brazil consumers are above-average users of messaging apps, phone-call apps, and social media with businesses. Mexico consumers reflect global averages with communications methods.
- **UK**
 - UK consumers are relatively low users of voice communications — mobile phone and phone-call apps — with businesses, but reflect global averages in most other areas.
- **U.S.**
 - U.S. consumers mostly reflect global patterns of communications methods usage with businesses, except for above-average reliance on SMS.

Please see the following pages for regional breakdowns of messaging/texting, voice calls, video, and social media usage.

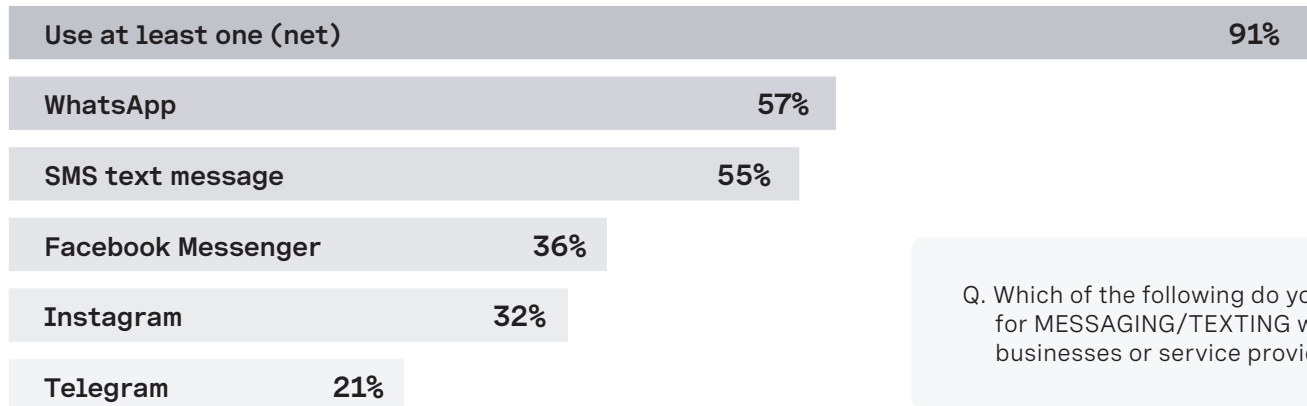
Use daily with business/service providers (%)

	TOTAL	NAM	LATAM		UK	EMEA					APAC							
		US	Brazil	Mexico	UK	France	Germany	Italy	Spain	Sweden	Australia	China	India (N)	India (S)	Indonesia	Japan	Singapore	South Korea
Mobile phone call	35	37	43	37	21	34	30	34	33	29	26	32	60	59	40	8	24	42
Messaging/non-SMS apps	30	26	45	34	24	29	27	35	26	21	17	10	51	49	68	4	34	12
Email	27	31	32	22	25	27	32	29	25	26	24	7	39	39	36	15	35	22
Phone call via apps	27	20	41	31	17	21	23	26	23	14	16	29	47	44	62	3	30	9
Social posts	24	23	37	30	20	17	18	20	19	20	14	33	42	34	47	4	17	16
Live chat/in-app messages	21	19	29	25	12	21	13	15	17	13	11	22	35	34	54	8	17	23
SMS text message	20	33	14	11	21	34	12	9	8	27	23	11	35	33	19	8	15	29
Push notification	19	23	31	19	19	11	15	11	11	13	12	15	34	36	27	11	19	18
Voice personal assistant	14	15	22	16	11	12	14	12	13	9	10	12	29	26	16	2	7	8
Call from webpage/app	13	14	18	14	11	12	9	6	10	8	9	11	32	27	16	4	9	7
Video chat	11	11	17	9	8	8	9	8	6	8	9	16	27	21	24	1	7	5
Automated phone support	11	11	17	12	9	8	9	8	7	6	7	10	26	21	16	1	6	6
Chatbot	9	8	12	8	9	9	10	6	7	8	5	7	26	20	13	1	5	6

■/■ Indicates higher/lower than other countries, with 90% confidence that these populations are truly different on these measures.

Q: How often do you connect with any business or service provider using each of the following?

The Channels: Messaging/Texting



Q. Which of the following do you use for MESSAGING/TEXTING with businesses or service providers?

APAC	EMEA	LATAM
SMS text message — 61% WhatsApp — 53% Facebook Messenger — 36%	WhatsApp — 59% SMS text message — 46% Facebook Messenger — 28%	WhatsApp — 93% Facebook Messenger — 50% Instagram — 44%
UK	U.S.	
SMS text message — 56% WhatsApp — 54% Facebook Messenger — 37%	SMS text message — 76% Facebook Messenger — 40% iMessage — 21%	

Overview

- 91% of consumers use at least one messaging/texting platform, as global usage of these methods continues to increase (up from 87%).
- WhatsApp and SMS are the most widely used platforms.
- APAC (India, Indonesia, and China) and LATAM (Brazil and Mexico) lead in overall messaging app usage.
- Japan and Germany trail in overall usage.
- WhatsApp dominates other messaging/texting methods in Singapore and Italy.
- In contrast, the U.S., Australia, and South Korea rely mainly on SMS.

Next steps

- Messaging APIs link SMS, MMS, Rich Communication Services (RCS), and popular social chat apps within a single build. No matter what channels your customers use, you have the context to cultivate a top-notch customer experience.

Want more next steps?

See **Customer Frustrations and How AI Can Help** and **AI: Two-Way CX Traffic**.

The Channels: Voice Calls

Use at least one (net)	93%
Mobile phone call	73%
WhatsApp	45%
Facebook Messenger	19%
Microsoft	14%
Telegram	13%

Q. Which of the following do you use for VOICE CALLS with businesses or service providers?

APAC	EMEA	LATAM
Mobile phone call — 74% WhatsApp — 47% Facebook Messenger — 21%	Mobile phone call — 69% WhatsApp — 42% Facebook Messenger — 14%	WhatsApp — 74% Mobile phone call — 70% Facebook Messenger — 24%
UK	U.S.	
Mobile phone call — 76% WhatsApp — 35% Facebook Messenger — 18%	Mobile phone call — 80% Facebook Messenger — 24% FaceTime — 21%	

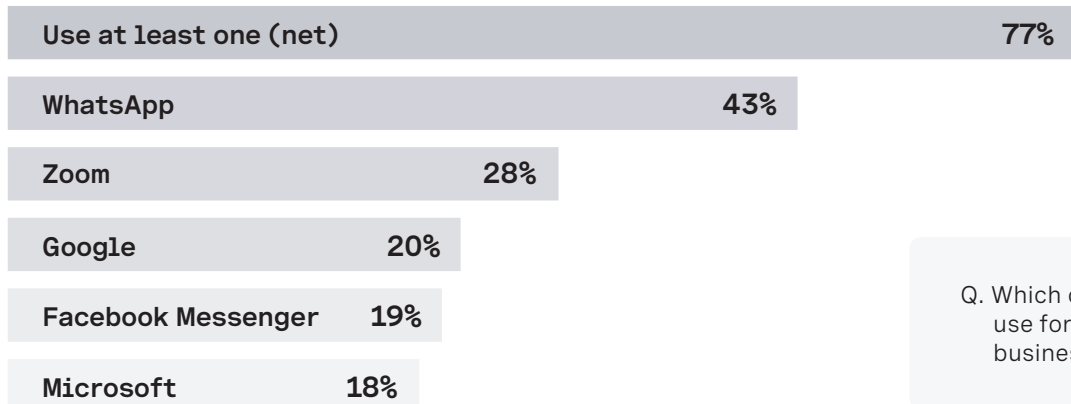
Overview

- 93% of consumers use at least one voice channel, as usage of voice/phone remains very strong.
- Voice call usage is very high in most markets, particularly India, Indonesia, and China.
- Mobile phone calls continue to be the most widely used voice communications method, followed by WhatsApp.
- Mobile phone usage is strong across most markets, including the U.S., however, Brazil and Indonesia prefer WhatsApp over mobile phones for voice calls.
- WeChat is the dominant phone app in China.
- LINE is the most-used phone app in Japan.
- The U.S. is the strongest FaceTime market.

Next steps

- Consumers like a phone call, but not spam. Branded calling allows businesses to promote transparency and trust by displaying their business name, logo, and call reason directly on the customer's lock screen.
- When customers call, they don't necessarily have to reach a human agent. A conversational AI solution — such as a voice API with natural language understanding and generative AI capabilities — provides near-human conversations that complements the live agent experience and elevates your CX efforts.

The Channels: Video



Q. Which of the following do you use for VIDEO CHAT/CALLS with businesses or service providers?

APAC	EMEA	LATAM
WhatsApp — 44% Zoom — 34% Google — 26%	WhatsApp — 40% Zoom — 18% FaceTime — 13%	WhatsApp — 71% Zoom — 31% Google — 25%
UK	U.S.	
WhatsApp — 40% Facebook Messenger — 36% Instagram — 26%	Facebook Messenger — 49% Instagram — 24% Youtube — 22%	

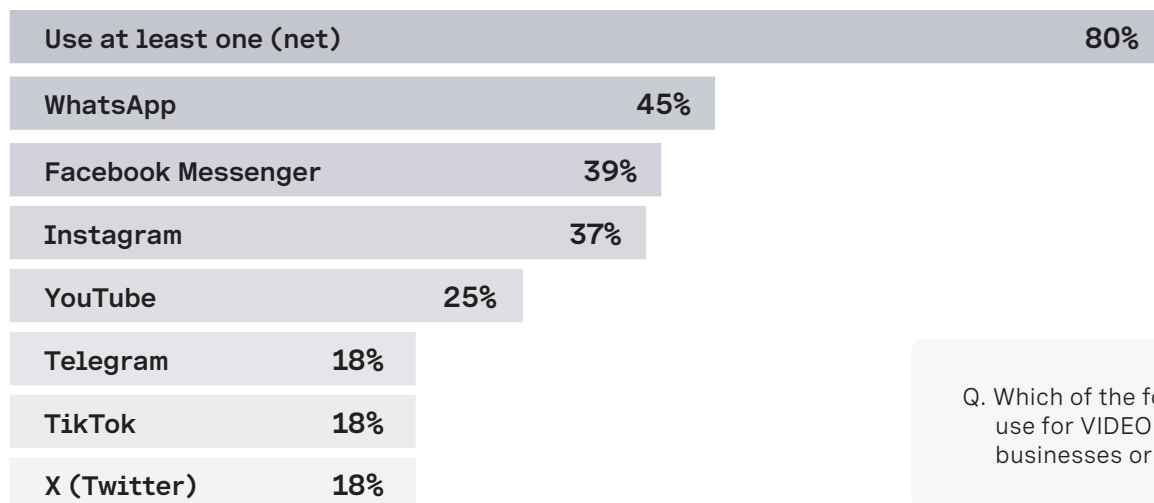
Overview

- 77% of consumers use video chat/call platforms, as global usage of this method continues to strengthen (up from 74%).
- Overall video chat/call usage is highest in India, Indonesia, China, and Brazil and trails in Japan, Sweden, UK, France, and Australia.
- WhatsApp usage far exceeds other platforms in Brazil, Germany, Spain, and Singapore.
- WeChat is by far the preferred choice in China.
- Zoom has solid usage in most markets.
- The U.S. market prefers Zoom, FaceTime, and Facebook Messenger.

Next steps

- A video API provides face-to-face accessibility across your app, website, and other channels. It's a great way to engage customers in the moment.
- AI capabilities and machine learning can anticipate a customer call and prompt responses to help service agents. These tools can conduct real-time sentiment analysis to escalate a call as needed. Agents can then join the call and quickly reference AI-generated insights to resolve a customer concern.
- AI offers noise cancellation, background blur and privacy features, AI-enhanced branding, and more — all to elevate your customer engagement.

The Channels: Social Media



Q. Which of the following do you use for VIDEO CHAT/CALLS with businesses or service providers?

APAC	EMEA	LATAM
WhatsApp — 45% Instagram — 40% Facebook Messenger — 38%	WhatsApp — 42% Facebook Messenger — 33% Instagram — 32%	WhatsApp — 74% Facebook Messenger — 52% Instagram — 52%
UK	U.S.	
WhatsApp — 74% Facebook Messenger — 52% Instagram — 52%	Facebook Messenger — 49% Instagram — 48% YouTube — 22%	

Overview

- 80% of consumers use social media platforms, as global usage of this method continues to strengthen (up from 78%).
- WhatsApp, Facebook Messenger, and Instagram remain the dominant platforms for social media communications.
- WhatsApp, Facebook, Instagram, and YouTube have solid usage across markets — except for China and Japan.
- Facebook Messenger leads all other platforms in the U.S., Sweden, and Australia.
- Japan is less likely to use social media to connect with businesses.
- The U.S. and Sweden are below the global average.

Next steps

- Customers like the spontaneous outreach over social channels. Thankfully for you, this doesn't require multiple systems to monitor multiple platforms. Instead, turn to communications APIs for a custom dashboard for full social integration.
- Personalized gifts and offers are great ways to build customer loyalty. AI-powered virtual agents can instantly respond to customers and thank them with personalized special offers.
- Conversational marketing workflows can encourage two-way conversations and even complete in-channel transactions.
- AI-automated responses can engage customers throughout their journey — including awareness, consideration, conversion, or reengagement

Regional- and Country-Specific Insights

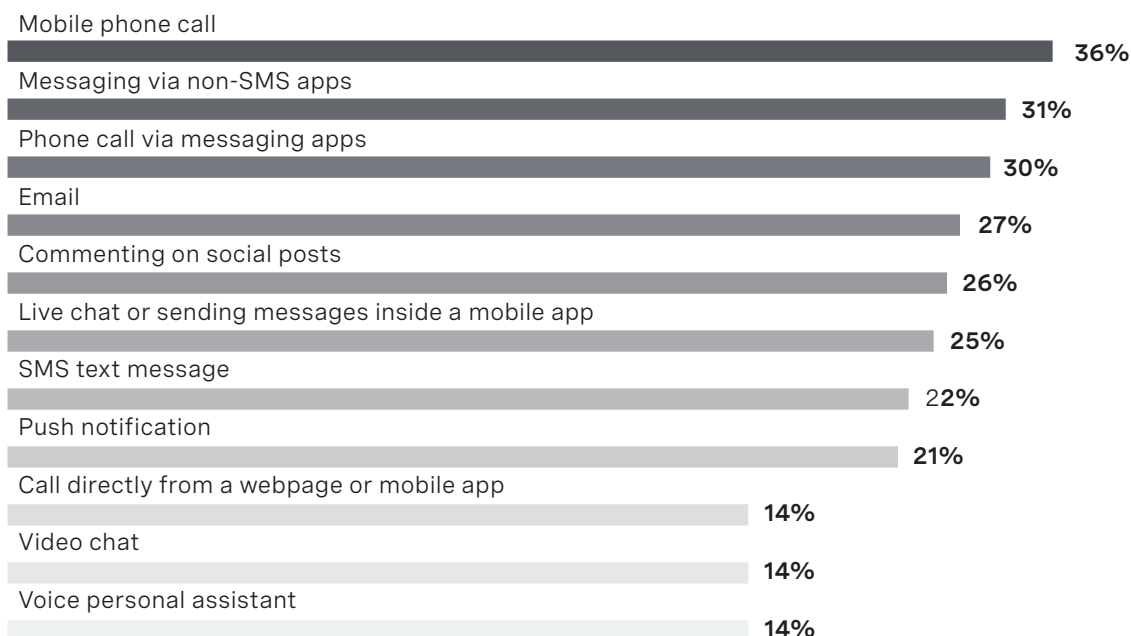
Snapshot: APAC

The region loves mobile phone calls and app-based phone calls and messages. And WhatsApp is a favorite for calls, messages, and video chats among these increasingly active communicators.

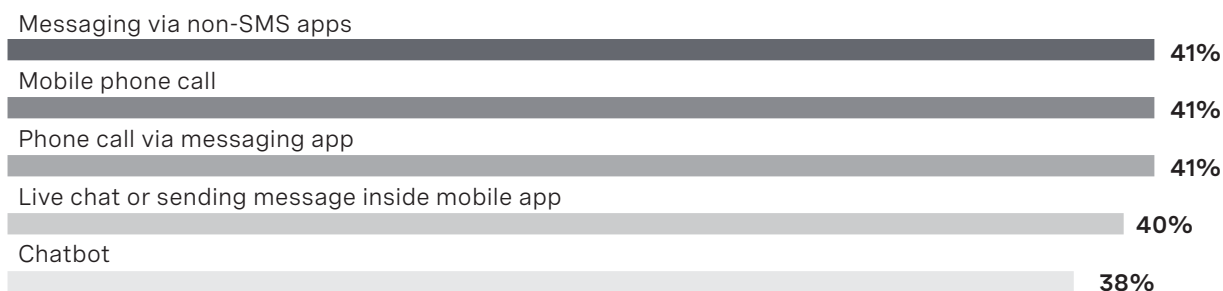
How AI can help

- In-app usage is up. Be sure to integrate AI into your apps to further service customers by answering quick questions, routing to a live agent, or closing a sale. In addition, embedding voice into apps significantly boosts call answer rates by fostering trust and transparency.
- Exponential improvements in AI, such as generative AI and large language models, can resolve more complex issues — often without any human interaction.
- Increase in video chat is a great chance to use AI capabilities and machine learning to anticipate a customer call and prompt responses for service agents. For example, AI can conduct real-time sentiment analysis to escalate a call as needed. When agents join the video call, they can reference AI-generated insights to quickly resolve a customer concern.

Current communication usage trends



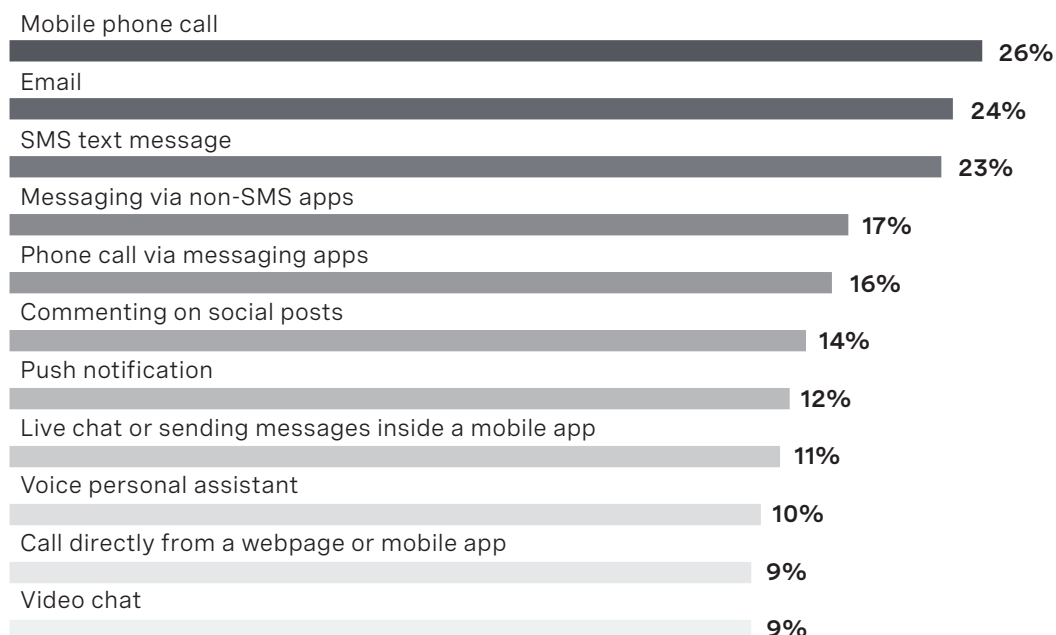
Top channels APAC customers will use more in the next 6-12 months



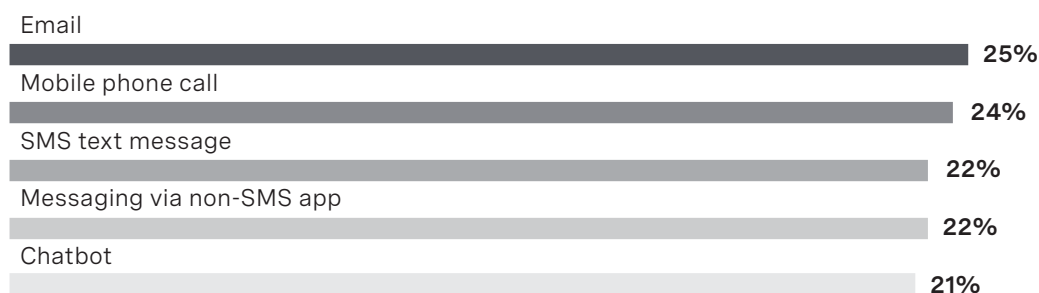
Australia Spotlight

This market prefers established communications channels, such as SMS text messages and mobile phone calls and have been slow to adopt messaging/phone apps. They are below-average online shoppers and cautious about using AI in CX (but are not rejecting it). There is no indication that these preferences will change quickly – most likely because Australia needs more convincing about the benefits of emerging communications technology.

Current communication usage trends

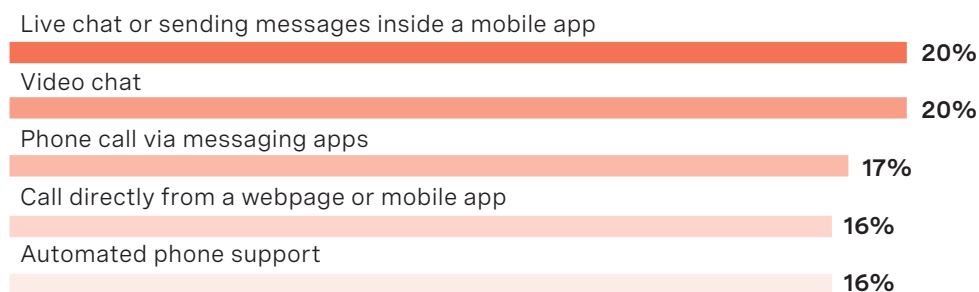


Top channels Australia customers will use more in the next 6-12 months



In addition to messaging apps and chatbot ...

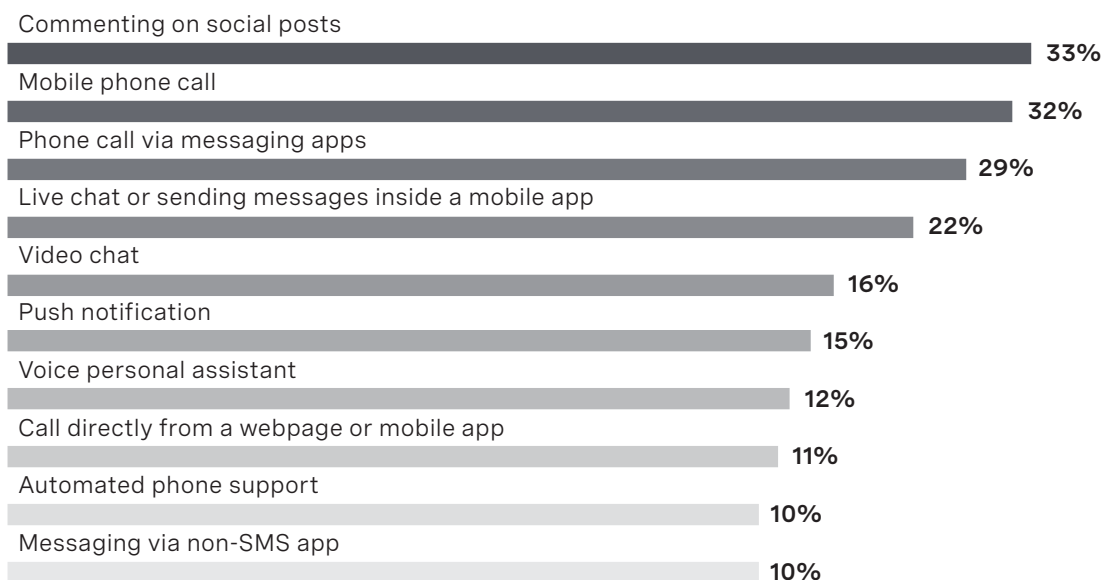
These AI-enabled channels will soon get a boost, too



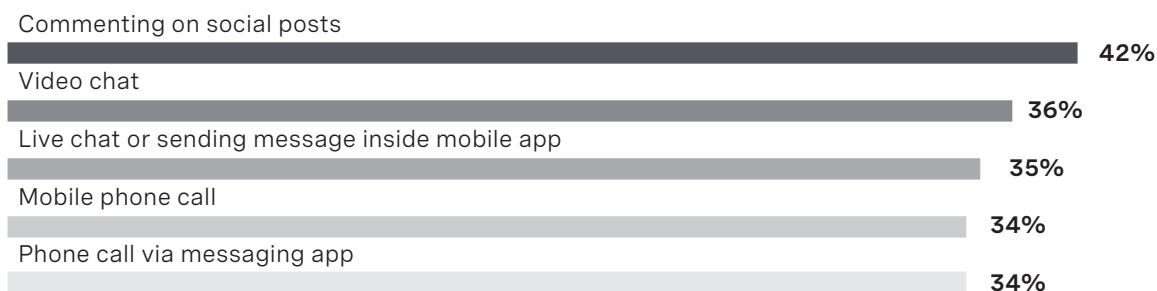
China Spotlight

Consumers rely mainly on mobile and app-based calls and social posts. WeChat dominates messaging, voice and video calls, and social media — particularly as consumers move away from traditional methods such as SMS text messages and email and begin to embrace multichannel communications and AI in CX. They are sensitive to frustrations in communicating with companies and willing to leave if personal data is compromised.

Current communication usage trends

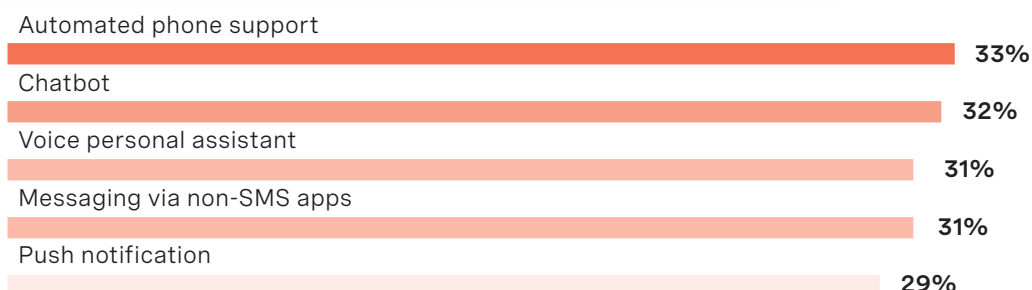


Top channels China customers will use more in the next 6-12 months



In addition to video chat and phone apps ...

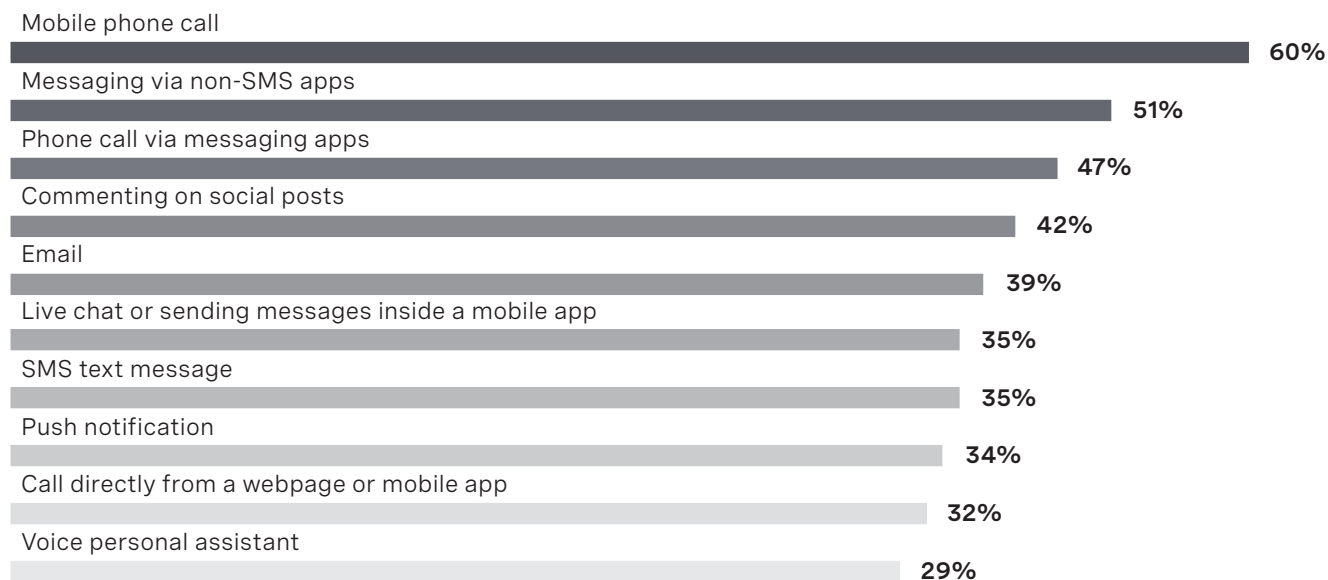
These AI-enabled channels will soon get a boost, too



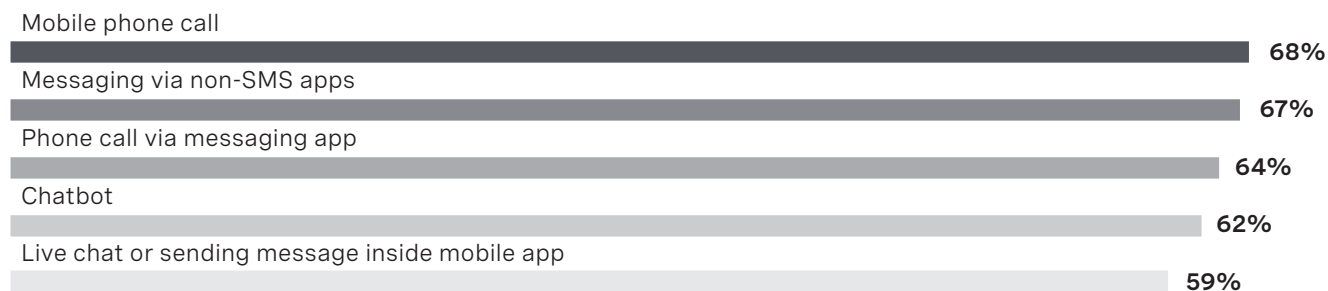
India - North Spotlight

This market loves mobile phone calls and app-based calls and messages, especially WhatsApp. Commenting on social posts is also popular among these active and optimistic communicators, who are receptive to increasingly using AI to improve CX but also wary about resulting threats to data security.

Current communication usage trends

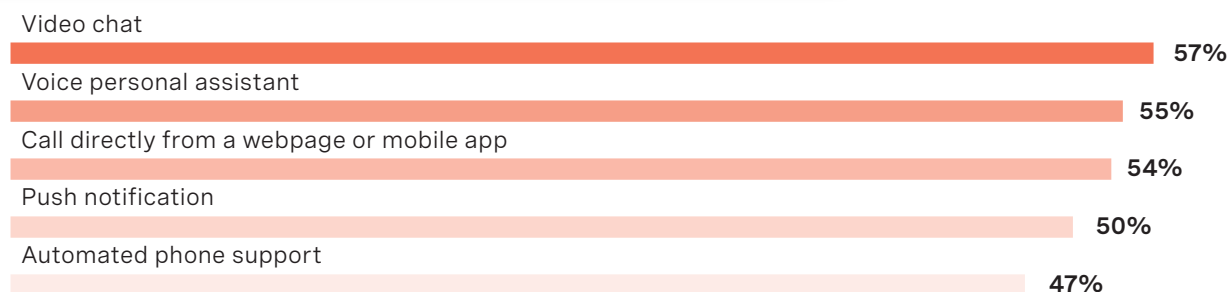


Top channels India - North customers will use more in the next 6-12 months



In addition to video chat and phone apps ...

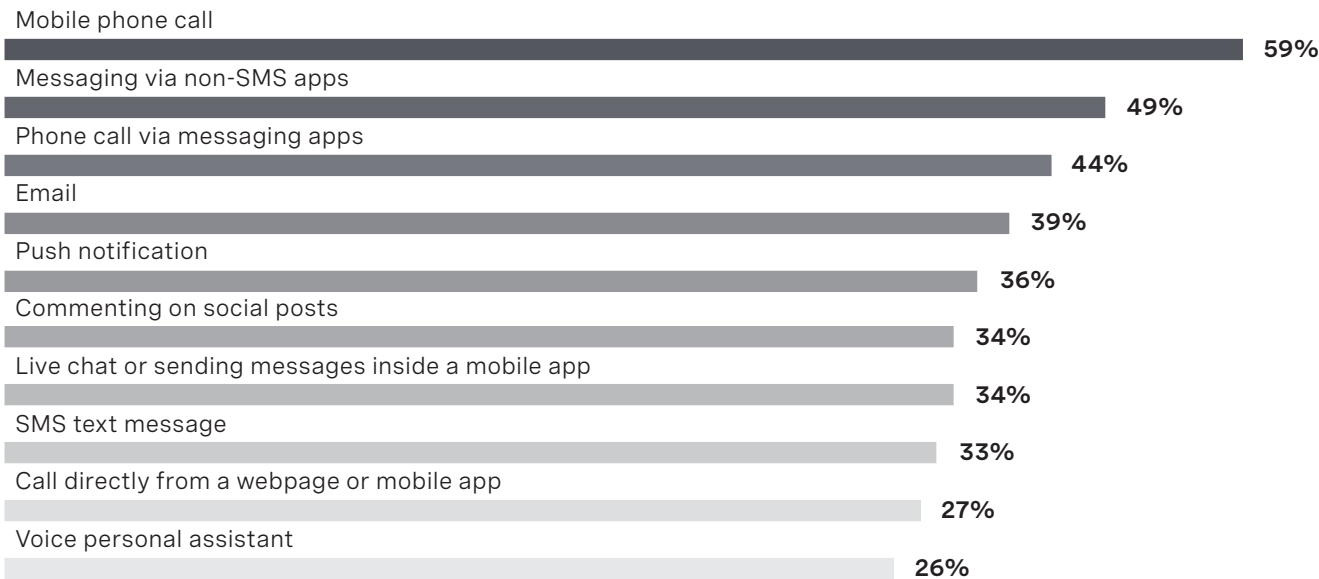
These AI-enabled channels will soon get a boost, too



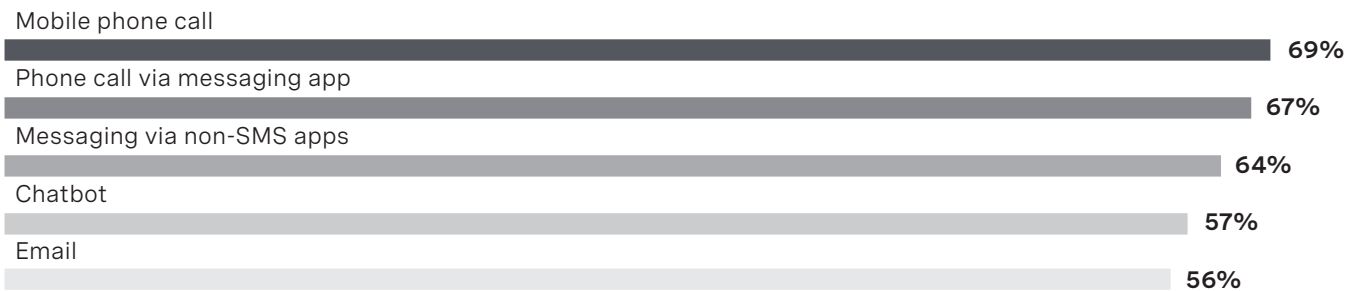
India - South Spotlight

Like their counterparts to the north, India-South consumers love mobile phone calls and app-based calls and messages, especially WhatsApp. Commenting on social posts is also popular among these active and optimistic communicators, who are receptive to increasingly using AI to improve CX but also wary about resulting threats to data security.

Current communication usage trends

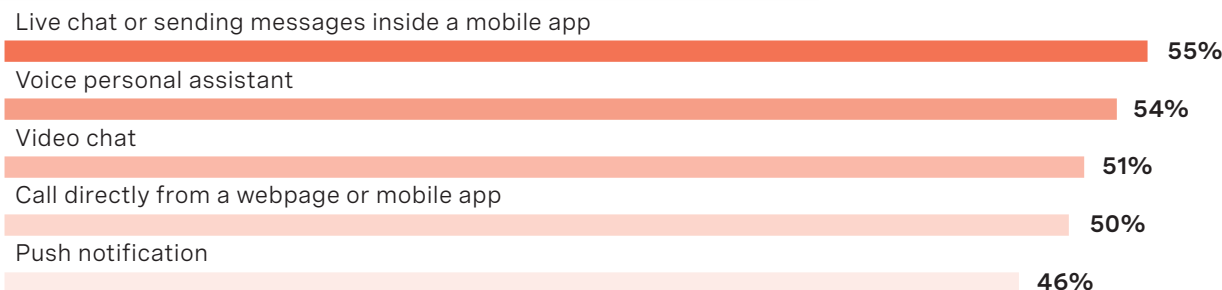


Top channels India - South customers will use more in the next 6-12 months



In addition to phone/messaging apps and chatbots ...

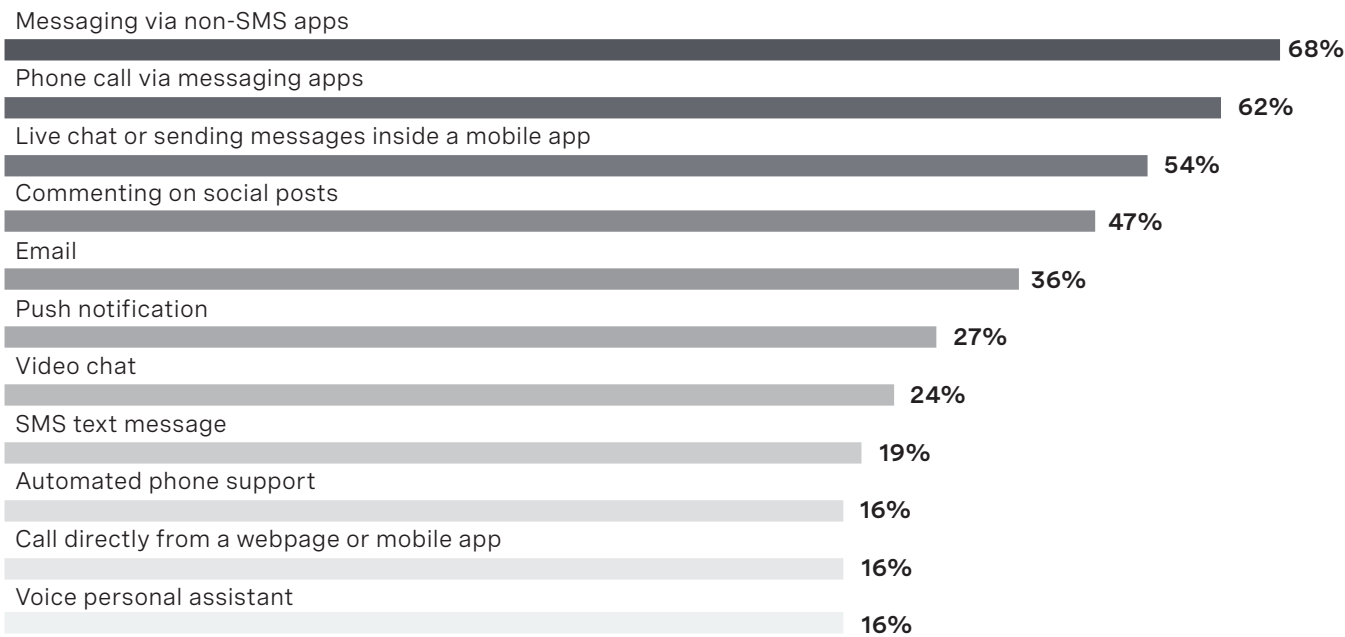
These AI-enabled channels will soon get a boost, too



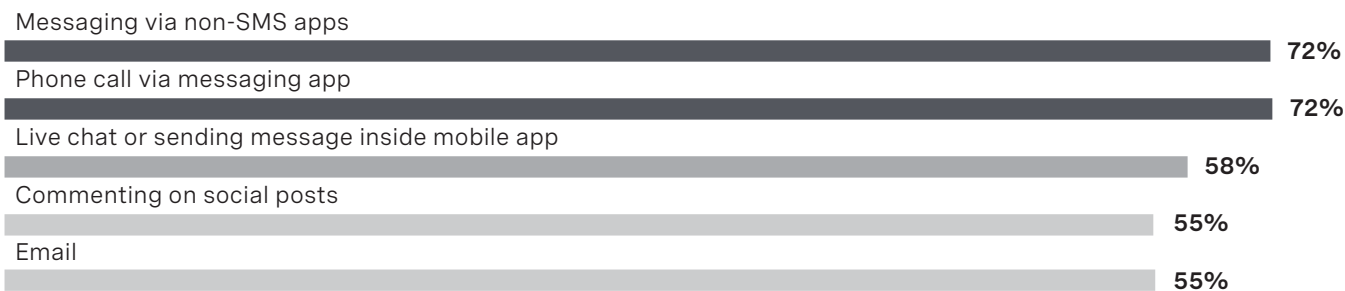
Indonesia Spotlight

This market has largely turned to mobile apps for communication (the most app-centric market in this study). WhatsApp is the dominant platform for messaging plus voice and video calls — and it’s also an important social media platform along with Facebook and Instagram. These tech-forward consumers are active online shoppers receptive to using AI to enhance their CX, especially if they can participate and authenticate through their favorite communications app.

Current communication usage trends



Top channels Indonesia customers will use more in the next 6-12 months



In addition to phone/messaging apps ...

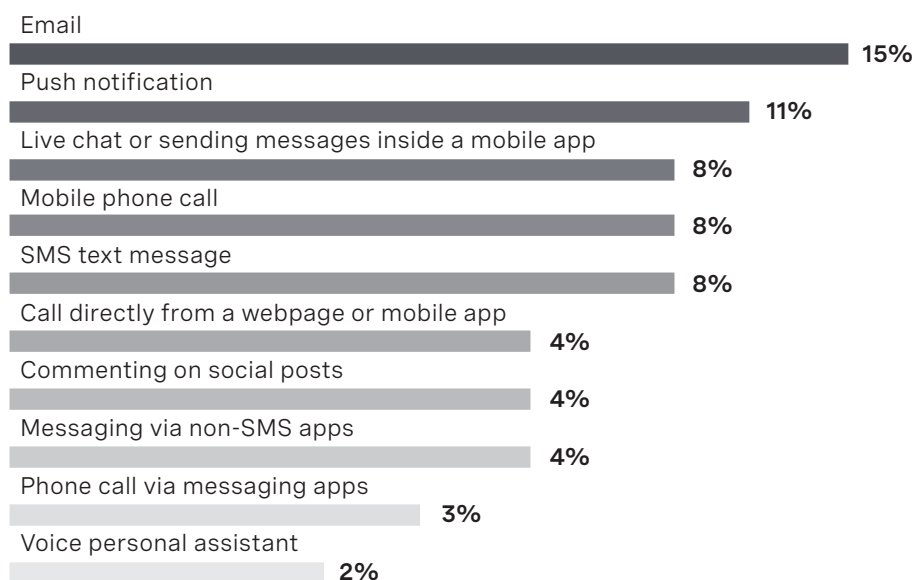
These AI-enabled channels will soon get a boost, too



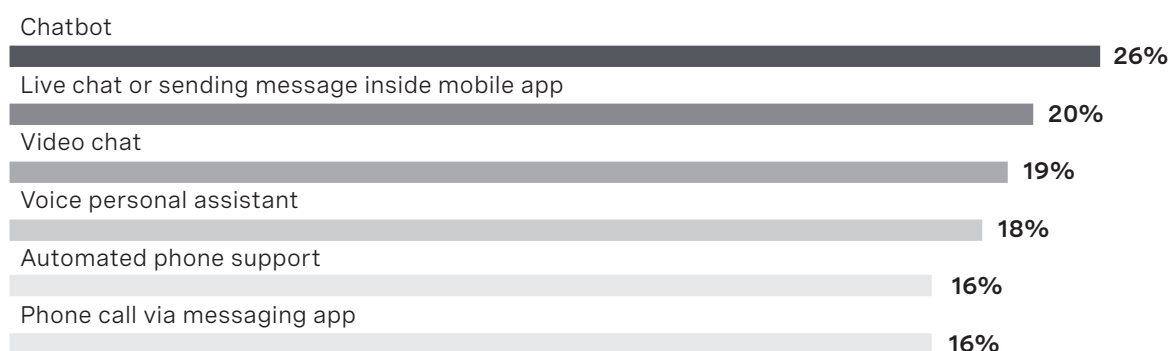
Japan Spotlight

Traditional email is the most popular channel among these communicators. LINE is a popular platform, especially for messaging, while many still use mobile phone calls and SMS texting with businesses. Despite being relatively tolerant of communications problems, they are not willing to put up with data breaches. These consumers are moderately interested in AI for improving CX if 2FA steps are kept to a minimum.

Current communication usage trends

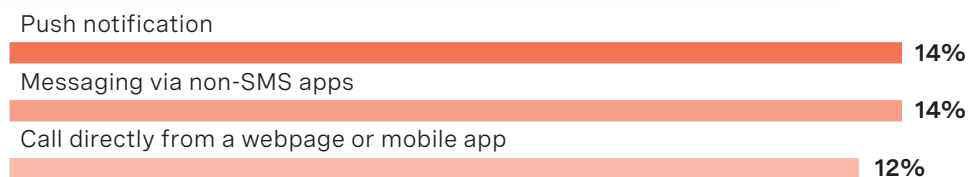


Top channels Japan customers will use more in the next 6-12 months



In addition to chatbot, video chat, and voice personal assistant ...

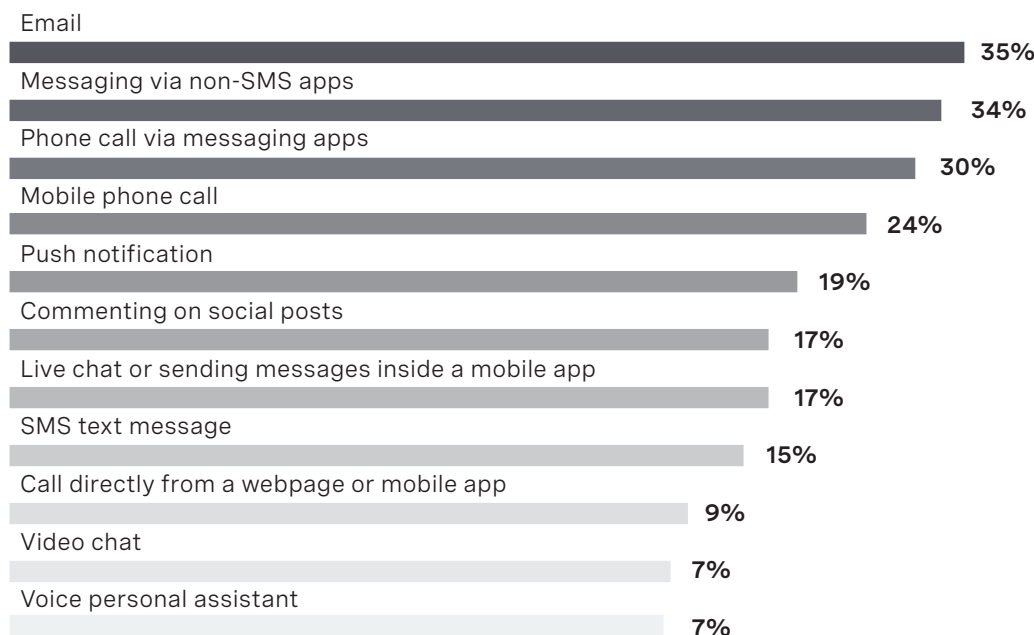
These AI-enabled channels will soon get a boost, too



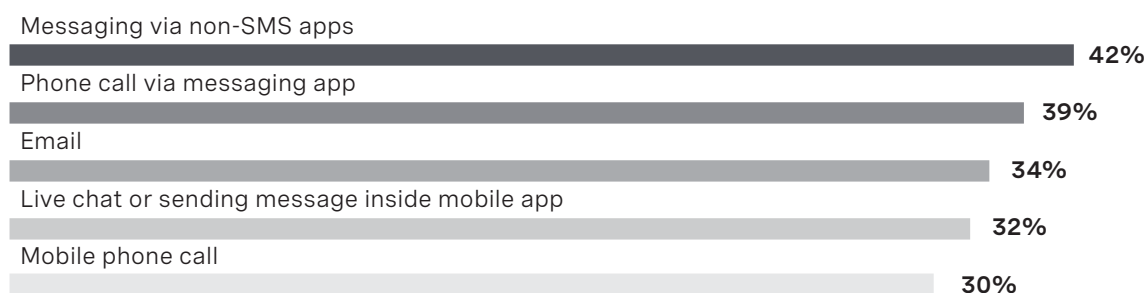
Singapore Spotlight

This diverse group of communicators is active with both messaging and voice apps (especially WhatsApp) and established channels (email, mobile phone calls, Facebook), but unwilling to tolerate communications frustrations with businesses. They are moderately interested in using AI to improve CX, however, they need reassurances about potential data security issues.

Current communication usage trends

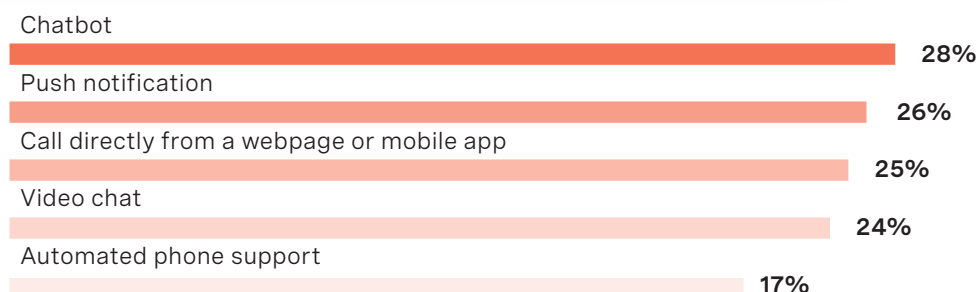


Top channels Singapore customers will use more in the next 6-12 months



In addition to phone/messaging apps ...

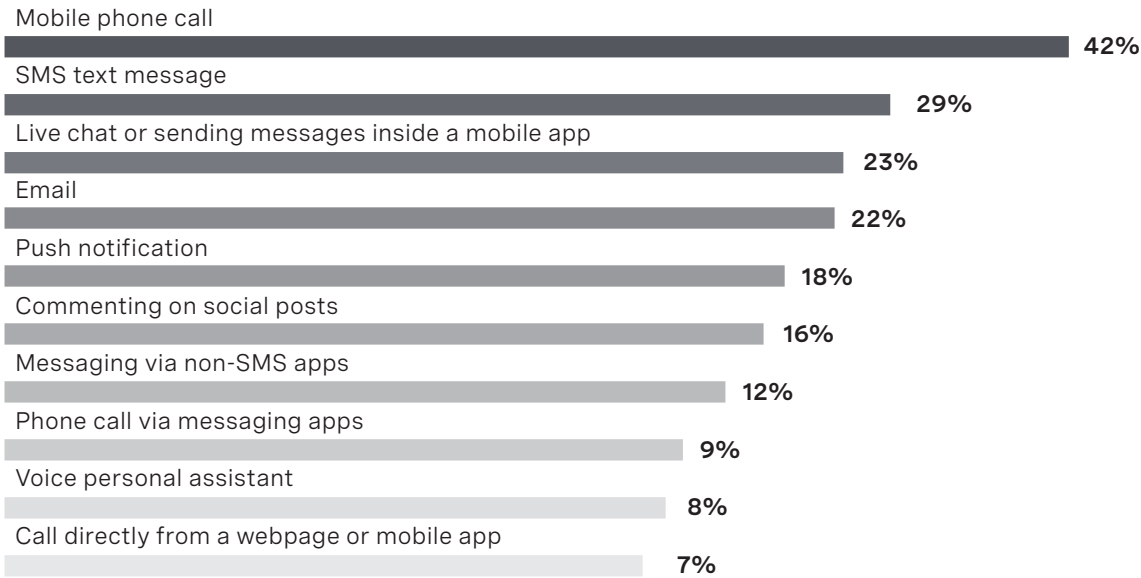
These AI-enabled channels will soon get a boost, too



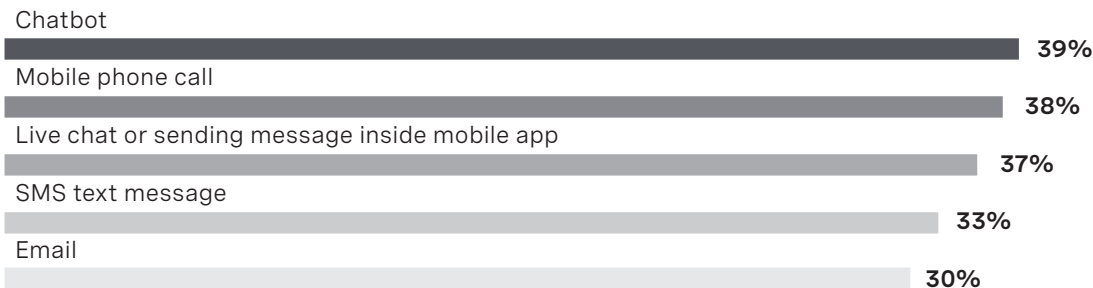
South Korea Spotlight

These consumers continue to rely mainly on traditional channels such as mobile phone calls and SMS text messages ... even landline phones. Phone and messaging apps are not widely adopted, but YouTube and Instagram are popular. These resilient consumers are relatively unlikely to act due to communications frustrations or data security issues/breaches. Plans to move toward AI-enabled channels are moderate.

Current communication usage trends

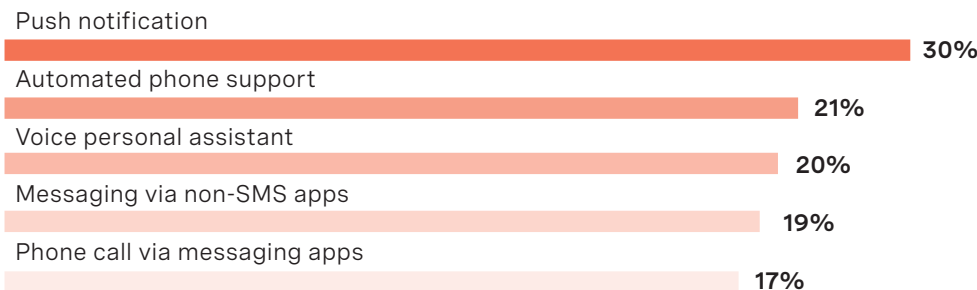


Top channels South Korea customers will use more in the next 6-12 months



In addition to chatbot ...

These AI-enabled channels will soon get a boost, too



Regional- and Country-Specific Insights

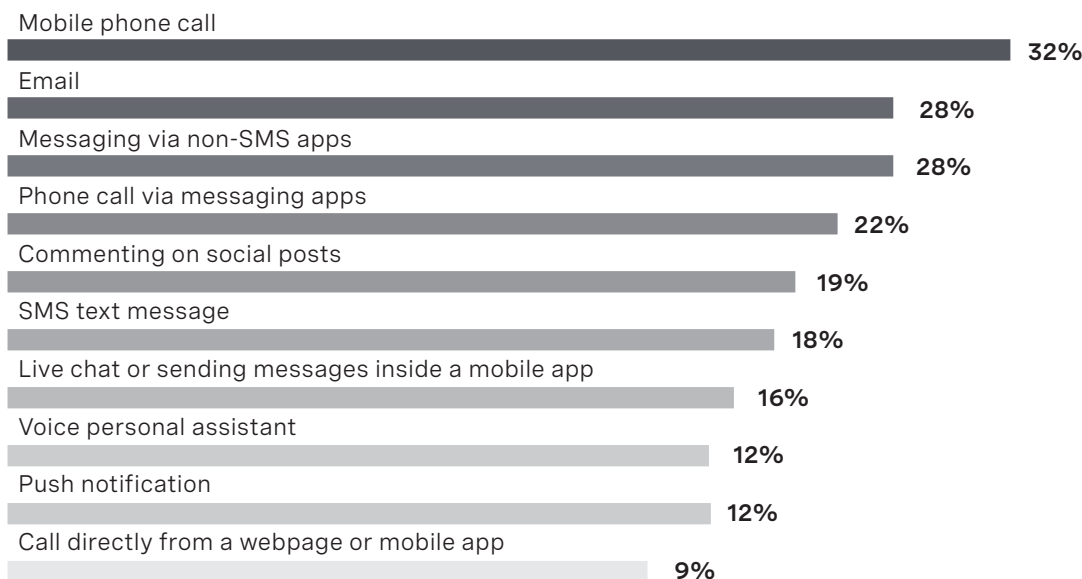
Snapshot: EMEA

Preferences for traditional methods like mobile phone calls and email remain strong in most markets, but apps are widely used in Italy and Spain. There is moderate interest in moving more toward AI-enabled channels for voice, messaging, and video. Acceptance of AI-powered support will likely take some time as these consumers are slow to engage with and trust emerging technology.

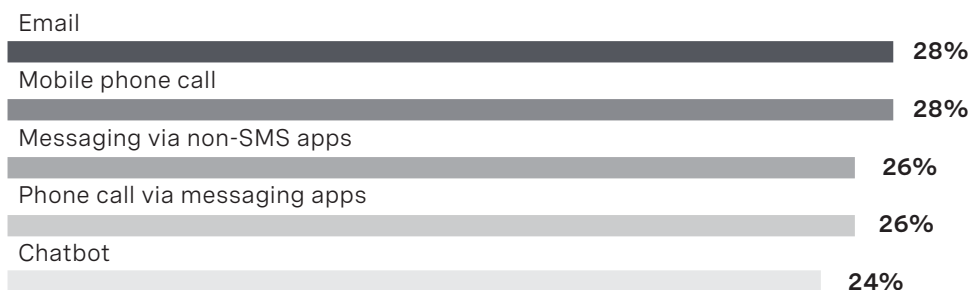
How AI can help

- AI suite of communications APIs can uniquely link the different channels — such as voice, email, and messaging.
- Interactive voice response (IVR) can bring automation to your voice efforts and put your CX on a 24/7 schedule.
- Similarly, AI can help with common questions or nurtures over the phone or messaging platforms.

Current communication usage trends



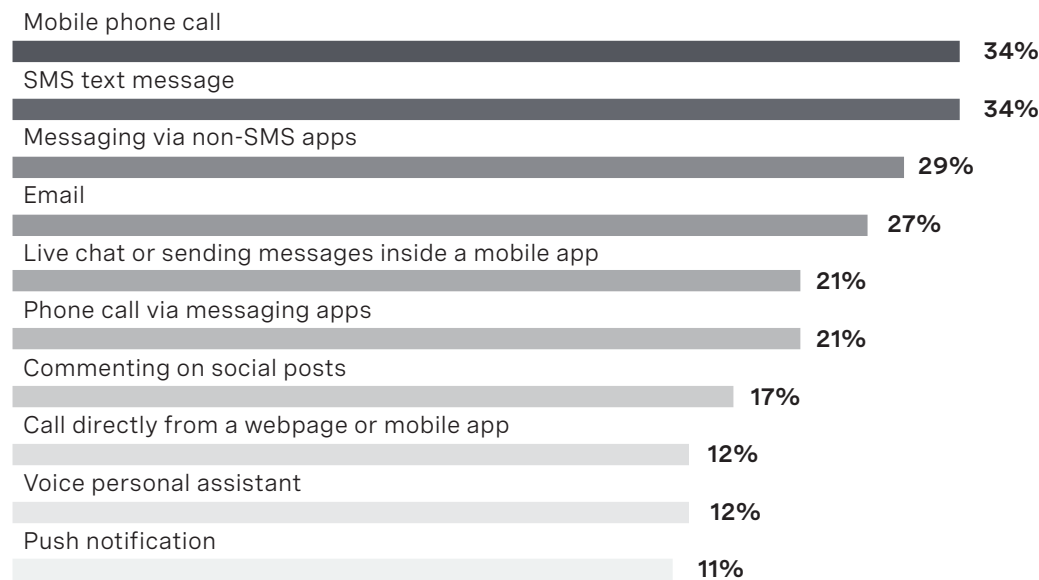
Top channels EMEA customers will use more in the next 6-12 months



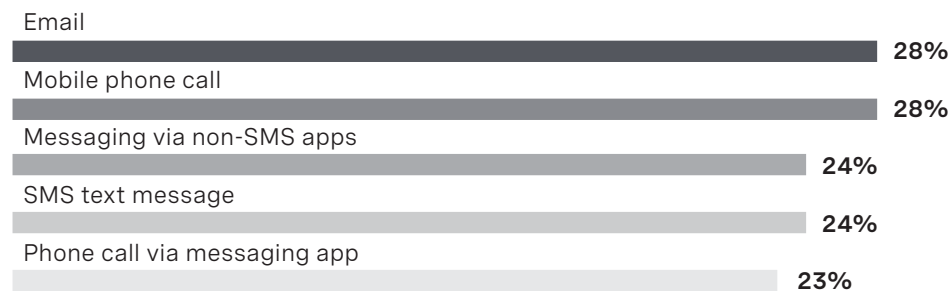
France Spotlight

Traditional mobile phone calls and SMS text messages are still strong channels, supplemented by some non-SMS apps for messaging. Several platforms continue to have moderate usage — including Facebook, Instagram, and WhatsApp — but adoption of video continues to lag. Despite relatively weak satisfaction with available methods for communicating with businesses and low tolerance for communications frustrations, these consumers are not strongly motivated to change.

Current communication usage trends

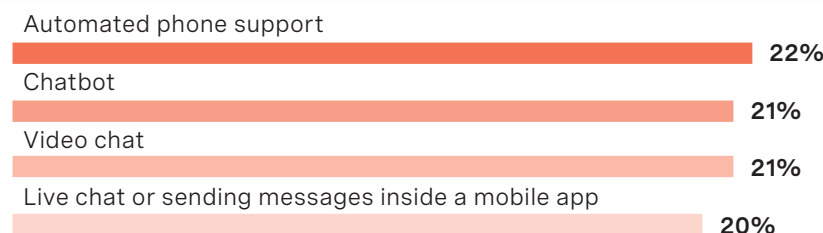


Top channels France customers will use more in the next 6-12 months



In addition to phone/messaging apps ...

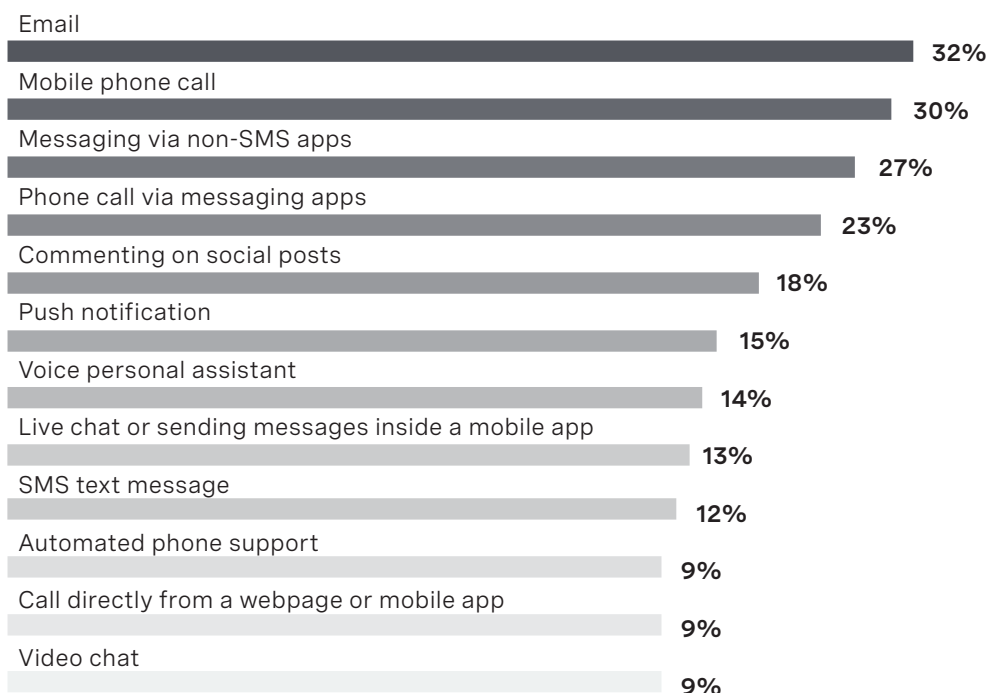
These AI-enabled channels will soon get a boost, too



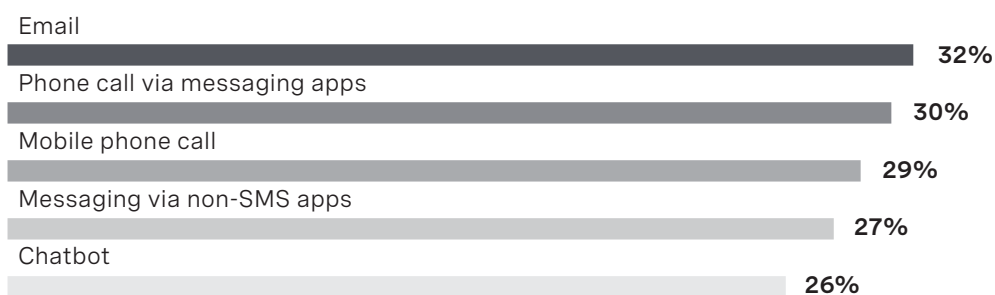
Germany Spotlight

Traditional methods such as mobile phone calls and email are popular. However, non-SMS apps (especially WhatsApp) have largely supplanted SMS text messages and Facebook. These cautious consumers are relatively skeptical about the effectiveness of 2FA and less comfortable with AI handling sensitive information. As a result, near-term migration toward AI-enabled channels will likely be moderate.

Current communication usage trends

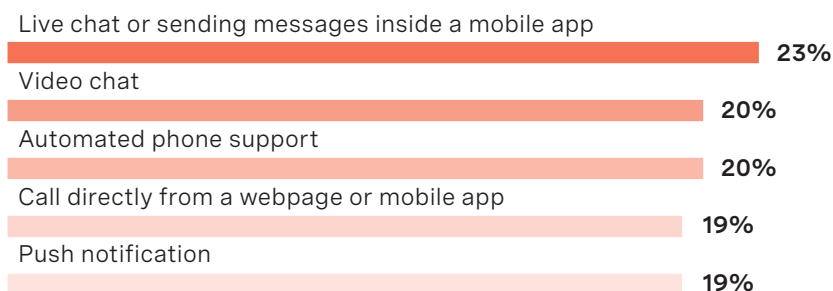


Top channels Germany customers will use more in the next 6-12 months



In addition to phone/messaging apps and chatbot ...

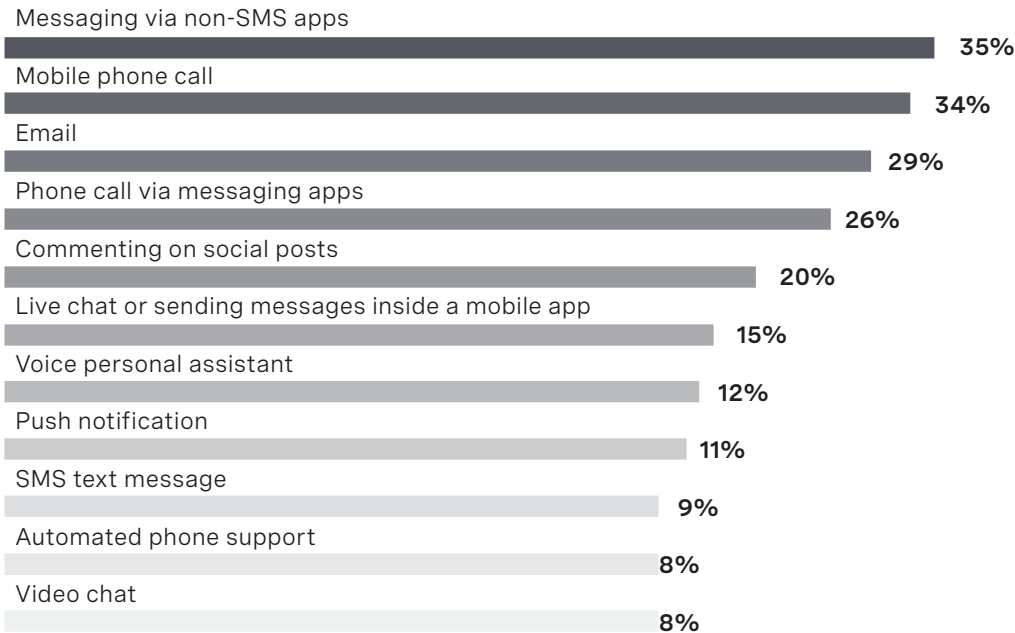
These AI-enabled channels will soon get a boost, too



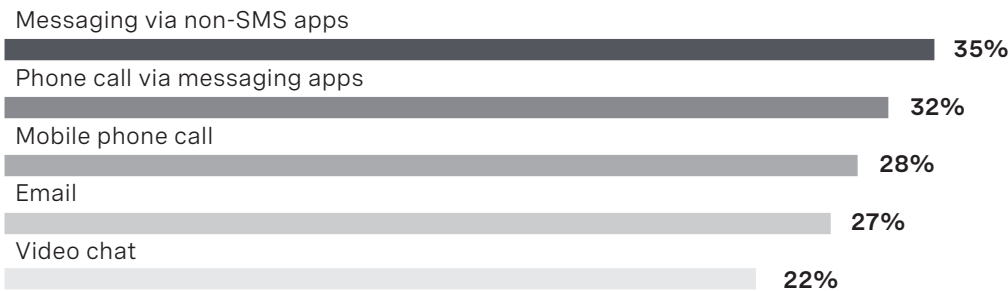
Italy Spotlight

Mobile phone calls are still widely used, but WhatsApp is the leading messaging, video, and social media platform and continues to make notable inroads for voice calls. These consumers will increasingly rely on app-based communications but are slow to engage with AI-enabled channels. Although they are reluctant to turn to AI-powered support, they are not concerned about resulting data security issues.

Current communication usage trends

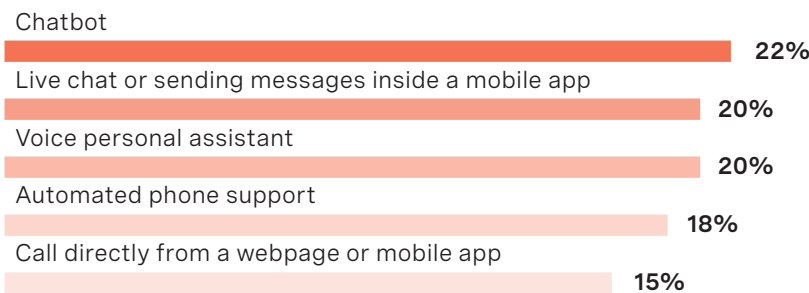


Top channels Italy customers will use more in the next 6-12 months



In addition to phone/messaging apps and video chat ...

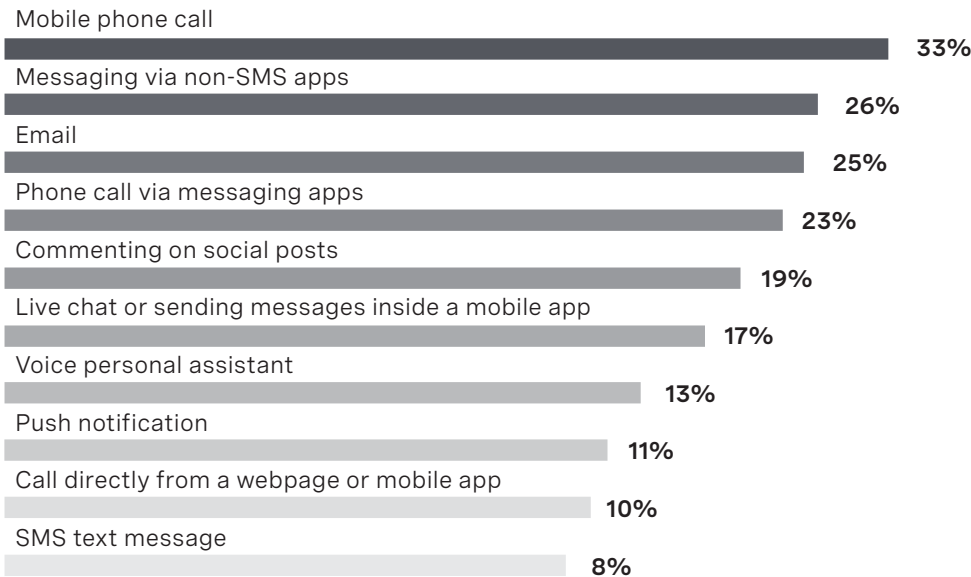
These AI-enabled channels will soon get a boost, too



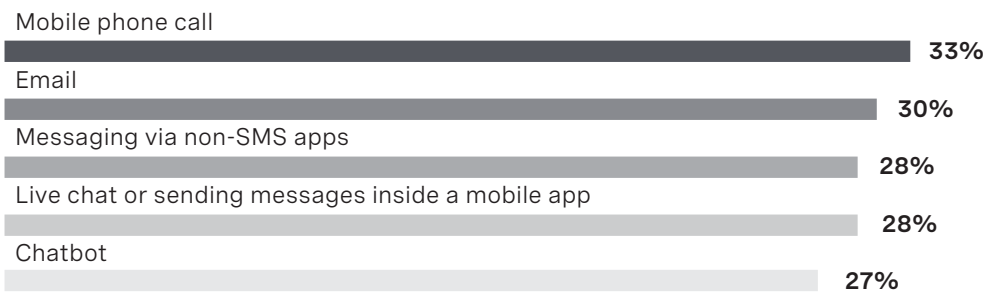
Spain Spotlight

Mobile phone calls and email are widely used, but WhatsApp dominates in messaging and video and is the most popular social media platform. And though there is AI usage, 86% are concerned about personal data with AI-enabled channels.

Current communication usage trends

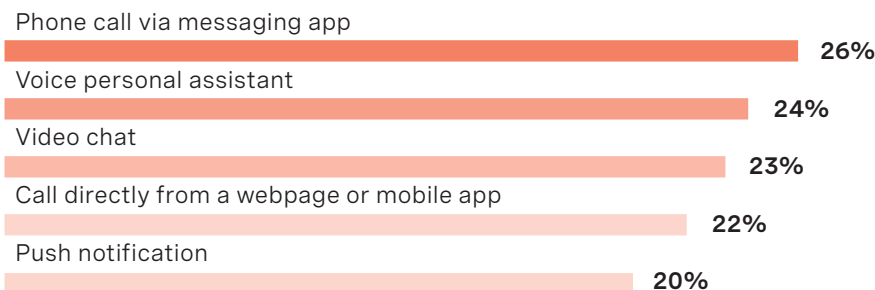


Top channels Spain customers will use more in the next 6-12 months



In addition to phone/messaging apps and chatbot ...

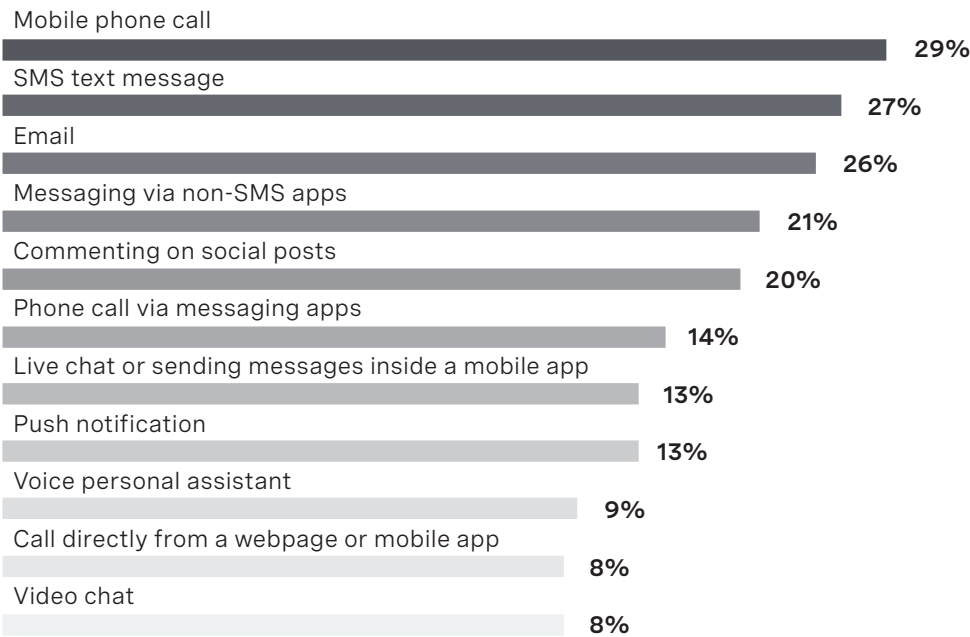
These AI-enabled channels will soon get a boost, too



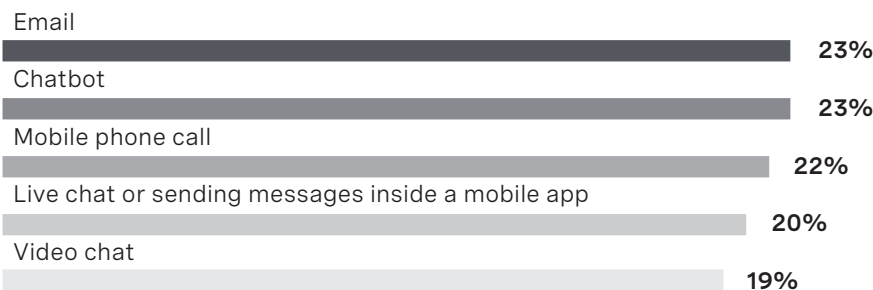
Sweden Spotlight

The market continues to rely on traditional methods such as mobile phone calls, SMS text messages, email, and Facebook and Instagram. App usage is relatively low and plans to migrate toward AI-enabled channels are moderate among these risk-averse consumers who are not planning to change their habits.

Current communication usage trends

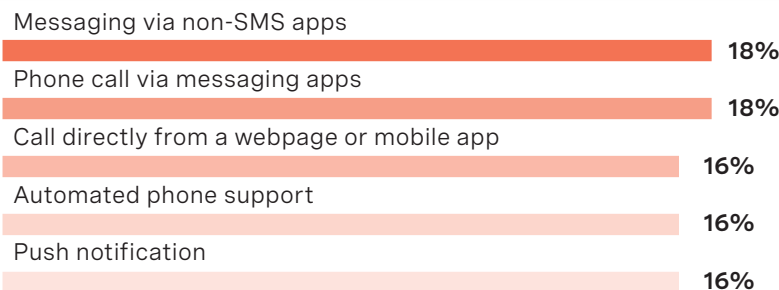


Top channels Sweden customers will use more in the next 6-12 months



In addition to chatbot, messaging apps, and video chat ...

These AI-enabled channels will soon get a boost, too



Regional- and Country-Specific Insights

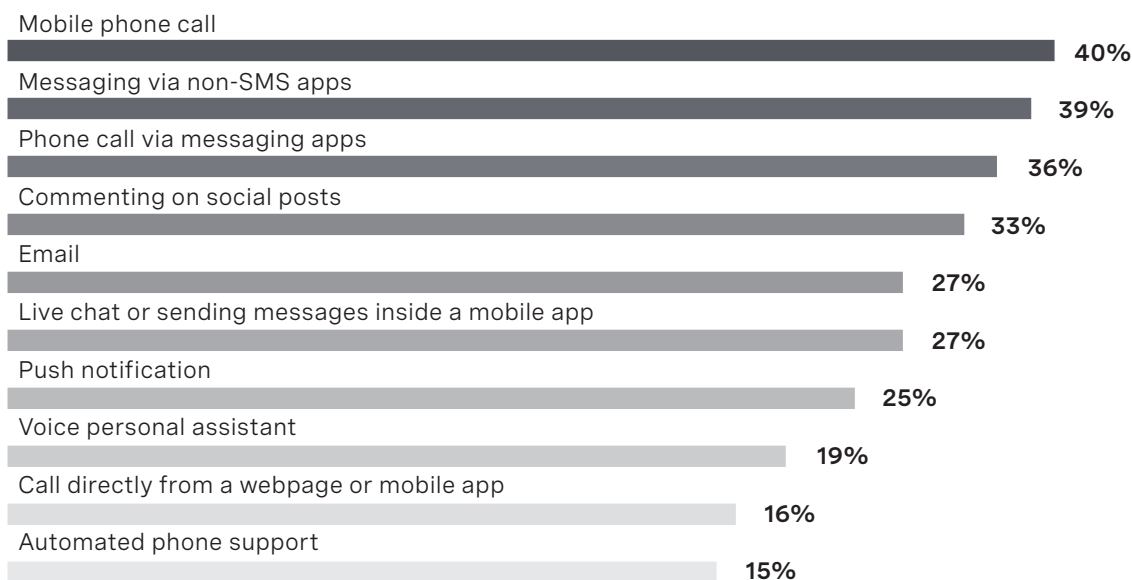
Snapshot: LATAM

The region shows high usage across most communications methods, with WhatsApp the dominant choice for voice calls, messages, social media, and video chats. However, Mexico consumers are not quite as messaging- and WhatsApp-centric as their Brazil counterparts. Future plans indicate that even more engagement with AI-enabled channels is likely if data security concerns are addressed.

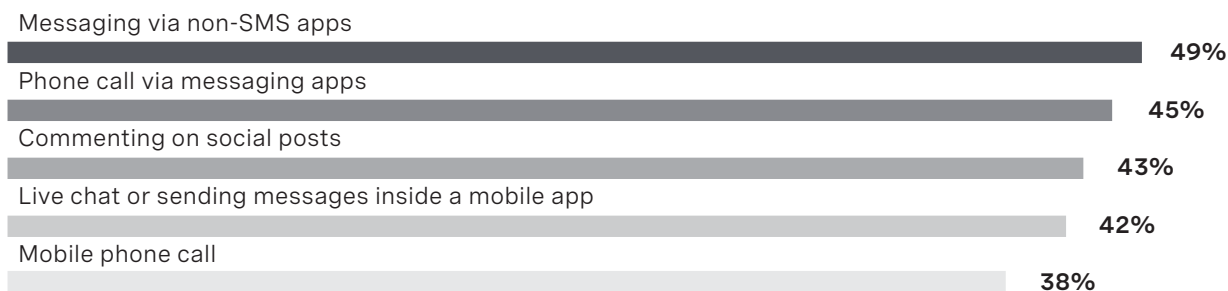
How AI can help

- A WhatsApp-specific API, along with a conversational marketing and commerce platform, can bring automation and personalization to your CX efforts. Now you can operate around the clock to answer quick questions, route to a live agent as needed, and even close a sale.

Current communication usage trends



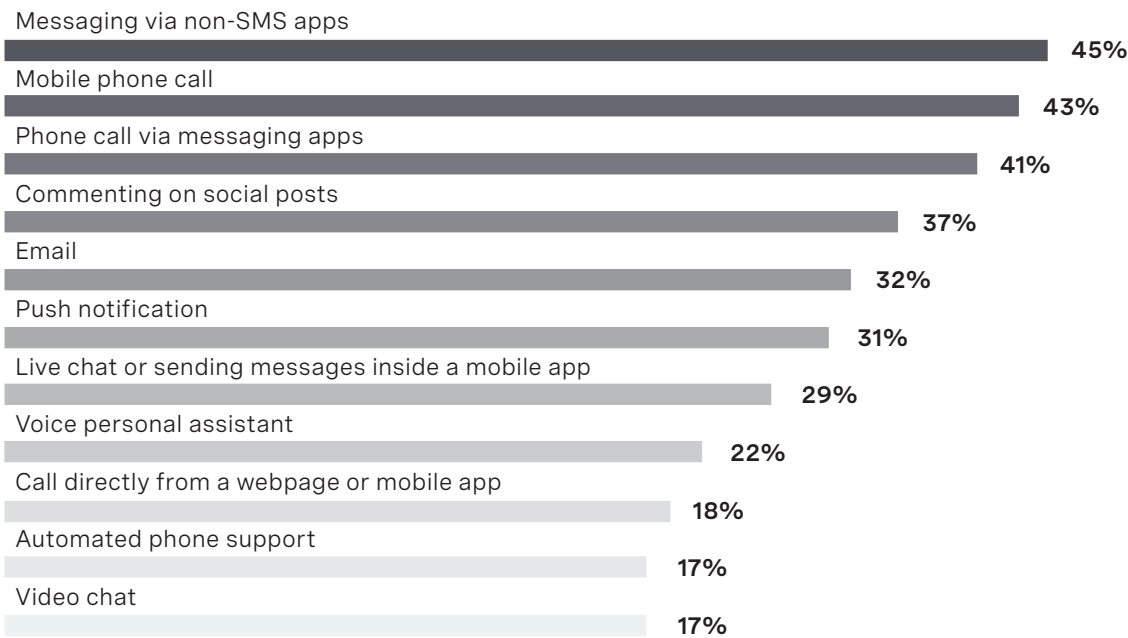
Top channels LATAM customers will use more in the next 6-12 months



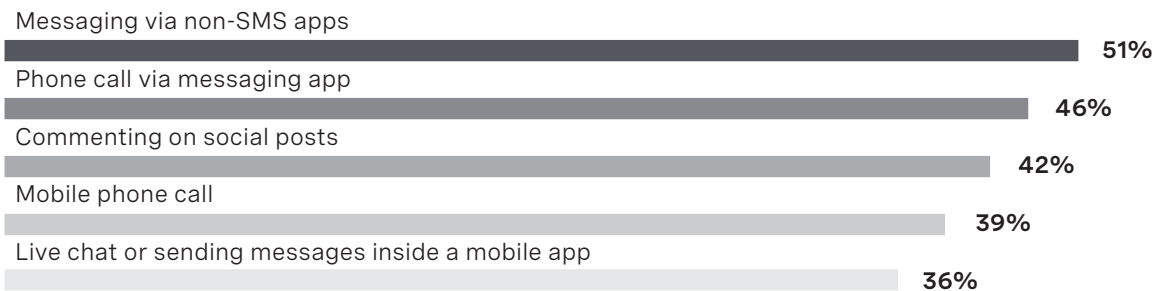
Brazil Spotlight

App-based messages and calls continue to be widely used. WhatsApp is the dominant choice for voice calls, messaging, social media, and video chats (many use Instagram for messaging and social media, too). These consumers have high expectations – with the lowest tolerance for communications frustrations globally – and want to do even more through messaging, such as AI-powered support and authentication.

Current communication usage trends



Top channels Brazil customers will use more in the next 6-12 months



In addition to phone/messaging apps ...

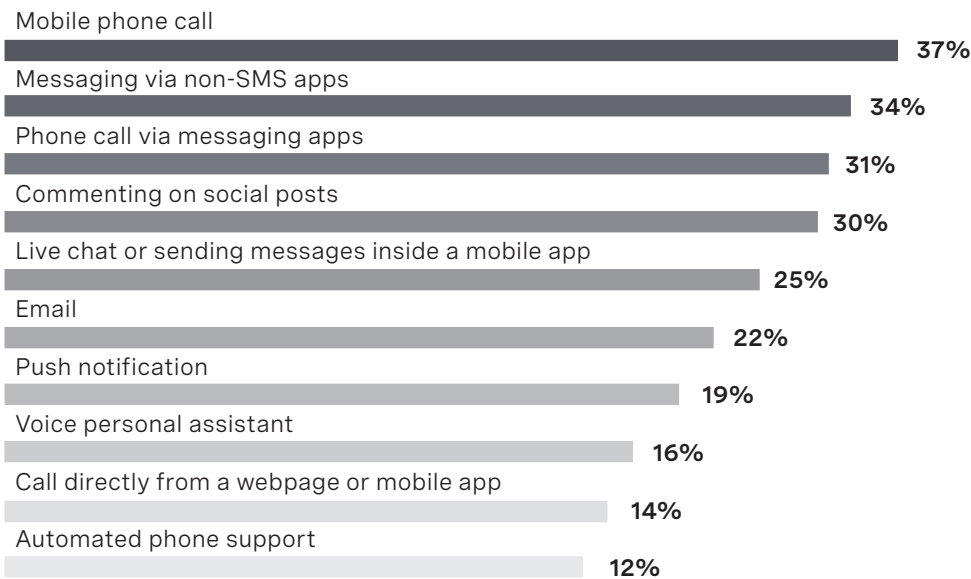
These AI-enabled channels will soon get a boost, too



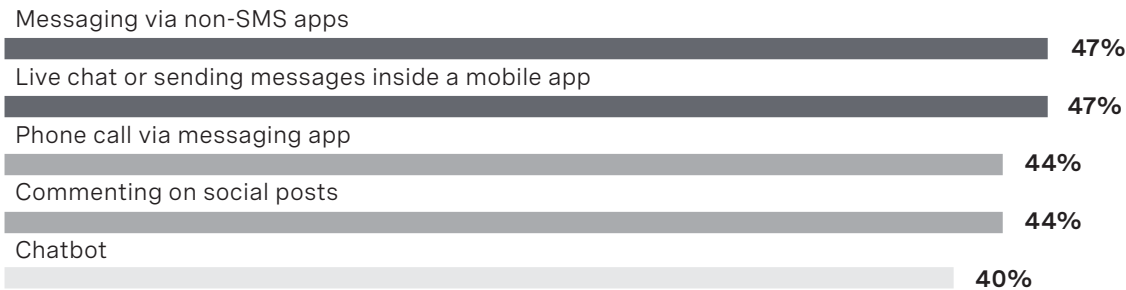
Mexico Spotlight

Mobile phone calls are widely used, but most messaging relies on non-SMS apps. WhatsApp is the most used platform for messaging and video chats (many use Zoom, too) and shares the top spot for social media with Facebook Messenger. WhatsApp also rivals mobile phones for voice calls. These consumers are comfortable with increasing AI capabilities but also concerned about potential data security issues.

Current communication usage trends

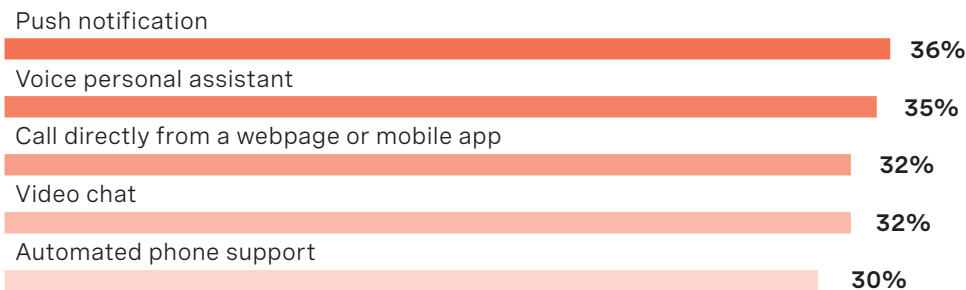


Top channels Mexico customers will use more in the next 6-12 months



In addition to phone/messaging apps and chatbot ...

These AI-enabled channels will soon get a boost, too



Regional- and Country-Specific Insights

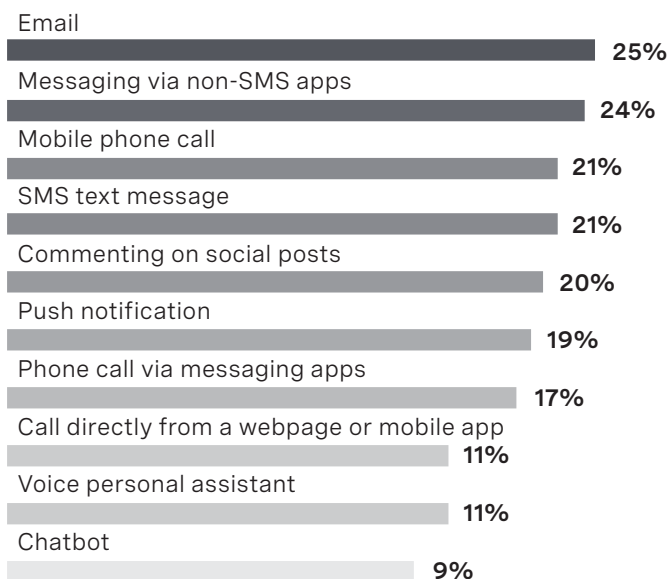
Snapshot: UK

These consumers balance traditional methods such as email, mobile phone calls, and SMS text messages with app-based messaging (WhatsApp), video chats (WhatsApp and Zoom), and social media (WhatsApp and Facebook). UK consumers appear likely to make only moderate changes and have not yet embraced expanding the role of AI in the customer experience.

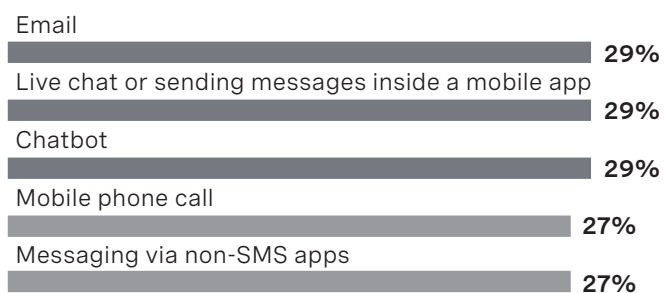
How AI can help

- A suite of communications APIs can uniquely link different channels, such as voice, email, and messaging. AI brings automation, personalization, and 24/7 efficiencies to better service customers.

Current communication usage trends

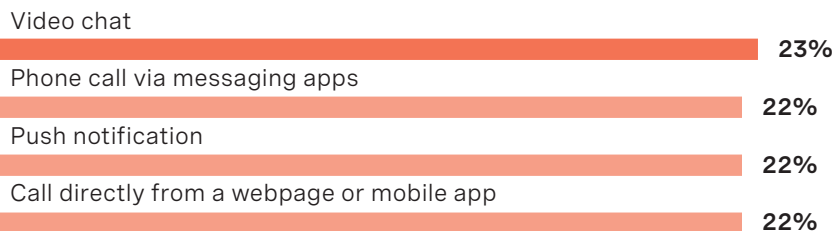


Top channels UK customers will use more in the next 6-12 months



In addition to phone/messaging apps and chatbots ...

These AI-enabled channels will soon get a boost, too



Regional- and Country-Specific Insights

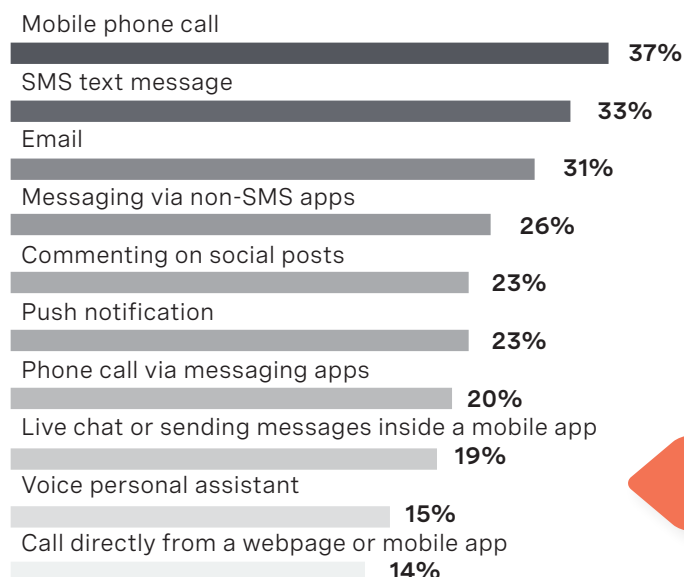
Snapshot: U.S.

U.S. consumers remain focused on SMS text messages, mobile phone calls, and email and plan to continue using these methods (especially SMS) — but also show moderate interest in moving toward more AI-enabled channels. Usage of built-in apps such as FaceTime continues to outpace those more popular globally (such as WhatsApp) and Facebook remains the leading social media platform. These consumers continue to view knowledgeable representatives as the core of effective customer support.

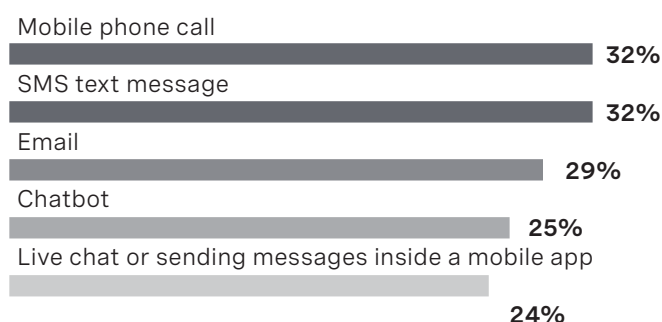
How AI can help

- In-app usage is up. Be sure to integrate AI into your apps to further service customers by answering quick questions, routing to a live agent, or closing a sale. In addition, embedding voice into apps significantly boosts call answer rates by fostering trust and transparency.
- Exponential improvements in AI, such as generative AI and large language models, can resolve more complex issues — often without any human interaction.
- Increase in video chat is a great chance to use AI capabilities and machine learning to anticipate a customer call and prompt responses for service agents. For example, AI can conduct real-time sentiment analysis to escalate a call as needed. When agents join the video call, they can reference AI-generated insights to quickly resolve a customer concern.

Current communication usage trends



Top channels U.S. customers will use more in the next 6-12 months



In addition to chatbot and phone apps ...

These AI-enabled channels will soon get a boost, too

