Understanding Chat Perceptions in a Customer Assistance Channel  
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This paper explores chat perceptions in a customer assistance channel. Through the analysis of chat perceived features and customer’s motivations to use it, we suggest that chat’s poorness is more positive in customers’ eyes than usually acknowledged, facilitating the assistance seeking of those who are reluctant to interaction.

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EXTENDED ABSTRACT

The development of self-service technologies, in an attempt to make customers autonomous, have paradoxically created new situations in which individuals may need help, for instance in the case of technological failure or customer mistakes (Bittner, Ostrom, and Meuter 2002; Meuter et al. 2000). A traditional response from companies has been to offer assistance via chat on websites, as a mean to assist and humanize websites. Thanks to its dialogical form, chat has also been presented as a way to alleviate the higher level of perceived risk encountered within e-service (Kumar and Benbasat 2002; Xu 2016).

The concept of customer assistance has not been clearly defined in the literature. We define it as the encounter between a customer acknowledging a problematic situation with a product or service, and a proposal for assistance by the company. Studies investigating chat as an assistance channel have relied on two main assumptions. First, the fact that e-retail and e-service need to be humanized (e.g. Hassanein and Head 2007; Park, Chung, and Rutherford 2011). Second, the fact that it is perceived as more risky by consumers than face-to-face interactions (Paluch and Wünderlich 2016; Featherman and Pavlou 2003). Moreover the limited studies looking at chat have taken a company’s point of view, rather than a consumer one. As a result, the research field lacks an understanding of customers’ perceptions of chat. This research addresses this gap and aims at i) understanding perceptions of chat as an assistance channel, and ii) explore customers’ motivations and limiting factors for the use of chat in an assistance context. Doing so, it addresses recent calls for research on customer experience in context (Klaus 2013) and on customer-initiated communications, which go beyond a purchasing context (Polo and Sese 2016).

This research investigates customers’ perceptions of online chat as an assistance channel in their own real-life assistance context. We adopt a service and consumer-centred point of view to study chat and customer’s need for assistance, relying on Human Computer Interaction (HCI) theories. We adopt a qualitative research design using semi-structured interviews. Our findings identify key criteria, which determine the need for assistance and willingness to use chat as perceived by customers.

Literature Review: Live Chat vs. Virtual agents, Technology Acceptance, and Perceived Risks

Chat has been defined in the service literature as the “sending and receiving of short text-based messages where the sender and the recipient communicate usually with no (or minimal) delays” (Froehle 2006). A main limitation of this definition is that it does not consider the nature of the interlocutor – whether the interlocutor is a human being or a virtual agent. Customers, however, may not be aware, before starting a conversation, whether their interlocutor will be of a human or virtual nature. Chat, in a customer assistance context, generally comes in two distinct forms. First, live chat refers to chat between humans. Live chat is often assimilated to a generic form of computer-mediated communication, and scholars draw from theories such as media richness theory (e.g. Froehle 2006; Graetz et al. 1998) or social presence theory (e.g. Verhagen et al. 2014) to study it. Live chat is considered synchronous text and a rather low media in terms of its richness (Froehle 2006). Second, virtual agents, which are artificial-intelligence-operated chat-robots (or chatbots), and have been studied in great detail in the field of HCI (Yee, Bailenson, and Rickertsen 2007).

Customer’s decision to use chat in an assistance context can be framed using HCI. First, Davis’ (1989) Technology Acceptance Model (TAM) provides an effective way to predict whether a user will be likely to use a given technological tool. His model puts forward two factors that predict this intention: the first one being the “perceived usefulness” and the second one being the “perceived ease of use” of the tool. This model has been largely applied to analyse customer’s adoption of new technological tools, and has been refined over the last decades. For instance, e-service adoption studies have added the notion of perceived risk to the initial dimensions (Featherman and Pavlou 2003), leaning on categories of risk identified by Cunningham (1967) such as performance risk and psychological risk. Assistance-seeking situations typically entail a certain degree of uncertainty and various degrees of stake, which is representative of risky situations. In their study on channel choice in customer-initiated communication, Polo and Sese (2016, 278) argue that amount of perceived risk, which differs depending on the nature (channel) of the interaction, will “determine customer channel preferences”. Perceived risk is thus also likely to play a role in a customer assistance channel decision.

Methodology: Semi Structured Interviews Investigating “Life Stories”

This research adopts a qualitative approach to explore and understand customers’ perceptions. We conducted 23 semi-structured interviews (totalling to 1165 minutes), using a purposive sampling strategy. Diversity was sought in terms of age, gender and type of occupation, in order to obtain the most diverse customer experiences. 17 interviewees recalled having used chat for online assistance. These were asked to recall one (or more) chat experience with a customer service representative online – whether live chat or virtual agent. They were encouraged to generate “life stories”, based on a narrative introspection (Carti, Cova, and Pace 2014). Six did not recall ever using chat as an online assistance channel. For these, interviews focused on their experiences of customer assistance (e.g. trying to solve a service failure). In addition, they were called out to imagine how assistance by chat might have been helpful – or not – in these situations. The use of a projective technique facilitate customers’ verbalisation of the obstacles that he / she imagines concerning the use of chat (Lavorata, Nilles, and Pontier 2005). Interviews, transcripts, and analyses were conducted in French, and subsequently translated in English by the first author. Interviews were coded separately using thematic analysis, and categories emerged thanks to constant comparison over the data (Corbin and Strauss 2015).

Findings: Heterogeneity of Customer’s Perceptions and Appreciations of Chat usage in Assistance Situations

Respondents point out the perceived nature of the interlocutor as key in their perceptions and interpretations. They characterize chat features according to two dimensions: a performance one and a relational one. We also identified four main types of motivations, which guide respondents through their assistance experience. The importance of the nature of the chat interlocutor

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The question of the nature of the interlocutor lies at the heart of the perception of chat in an assistance context. As summarised by one of the respondent:

*It is somehow mysterious, I am not sure whether it is like Siri in a written manner or if real people write themselves. When I see these chat proposals, I wonder: “Is there really someone behind?” Maybe it depends on websites.* (Mathilde, 25)

Respondents often express doubts about the true nature of their interlocutor – i.e. human vs. computer – when discussing a past chat experience. When the interlocutor is perceived as being a virtual agent, participants elaborate on the fact that companies may not be willing to use humans either because it would be too costly or because companies are not genuinely willing to help customers. Chat interlocutors identified as virtual agents generated mostly negative appreciations. When chat interlocutor is identified as a human, participants describe the interaction as “flowing freely”, they feel considered as dealing with a dedicated interlocutor.

**The perceived performance of customer assistance via chat**

Interviewees perceived the overall performance of chat in terms of two main dimensions: i) the outcome of the conversation, and ii) the time required to find a solution.

When reflecting on the outcome of a chat experience, most customers assessed the performance and usefulness of chat based on their perceptions of the nature of their interlocutor and of the company’s perceived intention to help or not. A chat interlocutor perceived as a virtual agent, does not, typically, seem useful to some:

> I feel it [chat] is not going to be of any use, I still believe chat is a machine. If a machine with the picture of a woman asks me “What are you looking for?” and that you get ready made answers like FAQs… I would rather look by myself. (Nelly, 40)

Respondents also reported a perceived need to have some specific abilities or skills – for instance being able to use specific terms – when chatting with a virtual agent. Conversely, chatting with a human is generally perceived as easier. Some respondents reported communication failures, mostly when interacting with virtual agents, when they did not succeed to receive valuable information.

In terms of the time dimension, overall, respondents put forward a series of performance characteristics of chat, in comparison to other assistance channels: its free nature, its immediacy, ease of access and initiation – especially the fact that, compared with phone customer assistance, a representative can be reached directly, without having to listen to an option menu first – and its flexibility allowing multitasking.

**The relational dimension of chat**

Chat is predominantly seen as less spontaneous and less warm than a conversation on the phone or face-to-face, as it conveys fewer emotional cues. Some respondents paradoxically perceived this distance as an asset in an assistance context:

> Chat is perfect, you have all advantages of email, like being more anonymous than phone, not to have to discuss with someone, but it is more immediate and you can react to it live (Florent, 28).

More specifically, for some customers, the lack of richness of chat as an assistance channel means that customers tend i) not to feel judged by a perceived condescending tone of voice, ii) not to be directly exposed to a representative’s disengagement, iii) not to feel influenced (e.g. feeling obliged to buy a product or service), and iv) to feel in control over the course of the interaction (e.g. being able to interrupt it easily). Thus, chat alleviates risks traditionally associated with interacting with a representative.

For respondents who dealt with virtual agents, the evaluation of relational features of chat were overall negative. In this case, participants perceive virtual agents to lack the capacity to understand customers. This was often interpreted as a lack of consideration from the company. On some occasions, when participants reported a sudden realisation that they had been conversing with a virtual agent rather than a human representative, they generally felt deceived.

**Chat as a customer assistance channel: customers’ motivations**

As for the motivations that led customers to choose a specific assistance channel, four main categories emerged: *assistance request avoidance, impression of having no choice, performance seeking and minimum direct contact*. The assistance-request avoidance customer is deferring as much as possible the moment where they will look for assistance, trying to solve problems autonomously first. The other three categories gather customers, who more readily accept to look for assistance. Some customers report an *impression of having no choice*. For these, chat might be the only option offered (e.g. those on a low cost mobile phone contract) or they might have become used to using a specific channel (phone or chat) as a default option to contact companies. In sum, some respondents do not feel that they are making a conscious channel choice. The *performance-seeking* customer is consciously setting up a performance-oriented strategy, based on former positive experiences, what they know about the company and what they anticipate about the complexity, importance and emergency of the situation. Finally, the *minimum direct contact seeking* customers, though willing to be assisted, drive their contact strategy towards minimizing direct interactions, sometimes at the expense of performance.

Overall, some customers feel genuinely motivated by the avoidance of direct interaction with the company. Chat seems to somehow address this concern by offering a more distant and customer-controlled form of communication. However chat also raises heterogeneous evaluations from customers, these differing mostly based on their interlocutors’ perceptions (human vs. virtual agent, see above).

**Discussion, Limitations, Future research and Conclusion**

**Discussion**

The contribution of this article to this emerging field of research is threefold. First, and paradoxically, results suggest that some respondents put forward the lack of richness of chat as one of its main assets. Two properties of chat appear beneficial to customers: i) the fact that chatting communicates fewer cues in the conversation, which lessens the risk of negative emotions. This can be seen as an illustration of the ‘neutrality effect’ (Byron 2008), which refers to the fact that a media providing less non-verbal cues generally creates less arousal. This neutrality effect, seen as positive feature in the context of assistance, appears to challenge the assumption that humanisation and social richness should always be sought for within customer-company relationships. And ii), the fact that chat is a less formalized way of communicating, which gives back some control and freedom to customers. This, in turn, contributes to reducing threats associated with assistance situations, such as looming face. In sum, customers seeking assistance via chat may do so because of the fact that chat offers a way to focus on a specific problem, without caring about the form or richness of the interaction.
Second, chat can be perceived as a way to lessen some of the performance and psychological risks associated with assistance seeking. In terms of performance risk, chat is perceived as a way to reduce time spent on assistance. Following Bellman, Lohse, and Johnson (1999) time consideration is an important driver for e-services usage. In terms of psychological risks, the neutrality and specific form of interaction of chat alleviates the risk of losing face in an interaction. One of the contributions of this research is thus to better understand consumers who are seeking to avoid contacts in an assistance situation. This statement challenges the idea that e-service is necessarily perceived as riskier than services implying direct interaction.

Third, this study shows that the nature of the chat interlocutor in an assistance context can be elusive albeit of the greatest importance for customers. The perceived nature (human or artificial intelligence) is critical to understand the adoption of this technological media. Thus, this study contributes to the technology acceptance literature by confirming perceived risk as a factor influencing channel/technology choice (Featherman and Pavlou 2003; Polo and Sese 2016).

Limitations and future research
This study carries two main limitations. First, experiences and representations of chat are likely to evolve rapidly, as consumers get additional opportunities to experience chat in a customer assistance context. Second, the artificial intelligence used by virtual agents is likely to improve dramatically in the coming years, which could eventually also change perceptions and representations.

Future research should focus on a wider non-chatters population to better understand the barriers to the use of chat. Moreover, it would be interesting to investigate chat perceptions in specific contexts (e.g. pre-purchase, after sale, technological failure, etc.) as they may vary accordingly. Finally, the concept of “need for customer assistance” appears pivotal to understand assistance seeking behaviours, and could be further explored and operationalized in order to evaluate customers’ propensity to seek assistance, and engage with chat.

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