The New 9 to 5: The State of CX in the Gig Economy

Customer Service Benchmark Report

^netomi

Introduction

Gone are the days of traditional blue and white-collar jobs - in at 9 AM and out at 5 PM. Today's world of work is brimming with freelancers and independent contractors who are involved in multiple ventures that afford them freedom and flexibility.

And, with advances in technology, finding opportunities and connecting with potential clients and customers is easier than ever. Permeating all corners of the globe, from the United States to Brazil, India and Indonesia, the gig economy is here, thriving and growing. What's more, the COVID-19 pandemic has placed emphasis on the indispensability of these platforms, with consumers opting for food delivery amid an era of social distancing, and tutors and fitness instructors turning to virtual platforms as demand for online classes and lessons soared. The rise of online shopping, coupled with increased time spent at home, has also boosted sales of goods such as handmade home furnishings, with sellers on Etsy having sold 12 million homemade masks in just a four-week period, totalling $133 million in sales.

The numbers speak to the gig economy's growth, as the number of gig workers is projected to rise from 43 million in 2018 to 78 million by 2023. The numbers speak to the gig economy's growth, as the number of gig workers is projected to rise from 43 million in 2018 to 78 million by 2023. The gig economy comes with a myriad of benefits for both its workers and customers - flexibility, convenience and speedy service among them - but what about the customer service side of the equation? Is this equally as up to speed?

For gig economy companies, the situation is a bit different than it is for other industries such as eCommerce. Customer service is even more challenging, as there is the need to cater to multiple segments of customers - both consumers and gig economy workers. Therefore, a multi-pronged approach is required.

Amid this new era of employment, Netomi's research team set out to analyze customer service for 87 of the top gig economy platforms, investigating how support is delivered across today's primary customer service channels: Phone, App, Email, Social Media (Instagram and Twitter).

Our biggest takeaway? Putting all of one's eggs into one basket may not be the ideal approach in the fast-paced, on-demand system that is the gig economy.

Highlights from The New 9 to 5: The State of CX in the Gig Economy

01 Under 3% of companies are "multichannel potent," with all channels (Twitter, Instagram, email, phone, and app) available for customer service.

02 Roughly 14% of companies only use the phone as a channel for customer service communication, 13% of companies use only social media, and 10% only use email.

03 Social media is reigning supreme, as 70 out of the 87 companies have an Instagram account.

04 Although fewer companies (54) have Twitter accounts than Instagram, this is a better channel for customer service communication between the two social media platforms, as 34% of companies responded to direct messages (DM's) received through Instagram, versus 69% for Twitter.

05 Following Twitter, the good old-fashioned telephone is the most promising channel to receive quality customer service (with an average P-SPI of 76).

06 While 59% of the companies surveyed have an app, only 28% of them provide a direct messaging feature for customer support.

07 Twitter is also a speedier channel in terms of wait times, which average 359 minutes (5.9 hours), compared to 1,843 minutes (30.7 hours) on Instagram.

08 Half of the companies that responded to messages via Instagram took 3 days to do so.

09 Ignore rates were 17% for phone, 23% for app, 30% for email, 33% for Twitter, and a shocking 66% for Instagram, meaning that customer queries were ignored when they reach out via these channels.

10 While personalization is desired and highly valued by many customers, of the email responses we received, only 12 (35%) were personalized, meaning that the customer (us) was addressed by their first name.

Methodology

We identified the top 87 gig economy companies spanning industries, from ride-sharing, to food delivery, legal and health. All companies are based in the United States, Europe and the United Kingdom.

For each company, the selection criteria was as follows:

- The company must have a gig-economy structure, meaning that the majority of its employees are hired as freelancers or those who provide freelancing services

- The company is based in either North America or Western Europe

- The company must have more than 20 employees

- In verified blogs and other sources, gig economy companies are cited as being such

We tested each company's support performance on five different channels:

Phone   **App**   **Email**   **Social Media**
(Instagram and Twitter)

Social Media

We logged on to each social media account on two platforms (Twitter and Instagram) and sent a direct message as a potential customer inquiring about refund policies and payment options. Personalization, resolution time, along with accuracy, were the key metric of interest for this channel. We acknowledged companies that went above and beyond to provide even more details, and bonus points were awarded to those that provided additional links to FAQs and other information.

For Instagram, we sent the following message:

Hello, my name is Will. I was wondering if you guys take Amex or cash as a payment option. I'm very interested.

For Twitter, we sent five variations of messages:

What if I am unhappy with the work someone does for me? Will I get a refund?

Hello, My name is Will Guile. I was wondering if you guys take Amexs as a payment option.

Hello, my name is William Guile. I'm just on the registering page and I was wondering, What if I am unhappy with the work someone does for me? Will I get a refund?

Email

The leading metrics for email included personalization, answer quality and resolution time. Are customers offered personalized greetings, messages and agent sign-offs? How frequently were tickets resolved? Bonus points were awarded for follow-up emails.

Similar to what we did for social media, we sent a message as a potential customer inquiring about a company's refund policy.

The message sent was as follows:

RE: Refund Inbox ✕

From: will1737@gmail.com
To: Support

Hello, my name is Will. I'm just on the registering page and I was wondering: What if I am unhappy with the work someone does for me? Will I get a refund?

Thanks
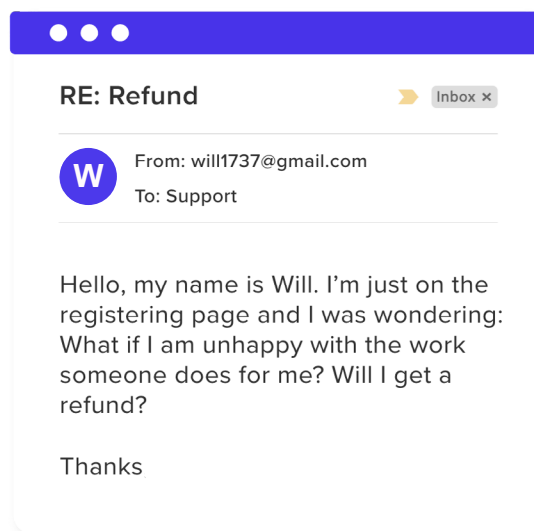
Phone

North American companies were contacted between the hours of noon and 4:00 PM EST, and companies based in Europe were contacted between the hours of 8:00 and 10:00 AM EST. We took note of the availability of agents, the response time, the number of times our call was redirected, and whether we were offered the option for a callback.

App

For this channel, we measured the presence of in-app easy chat solutions, this meaning that the app is user-friendly and simple for users to locate and navigate. For this channel, a strong emphasis was placed on answer quality (accessibility, accuracy and experience, questions answered, and whether or not responses were automated).

How easily accessible were the apps? How quick were companies to respond over this channel?

For those that do offer in-app messaging, we sent a message to each company as a potential customer inquiring about refund policies. The message was the same as it was for email:

Hello, my name is Will. I'm just on the registering page and I was wondering: What if I am unhappy with the work someone does for me? Will I get a refund?
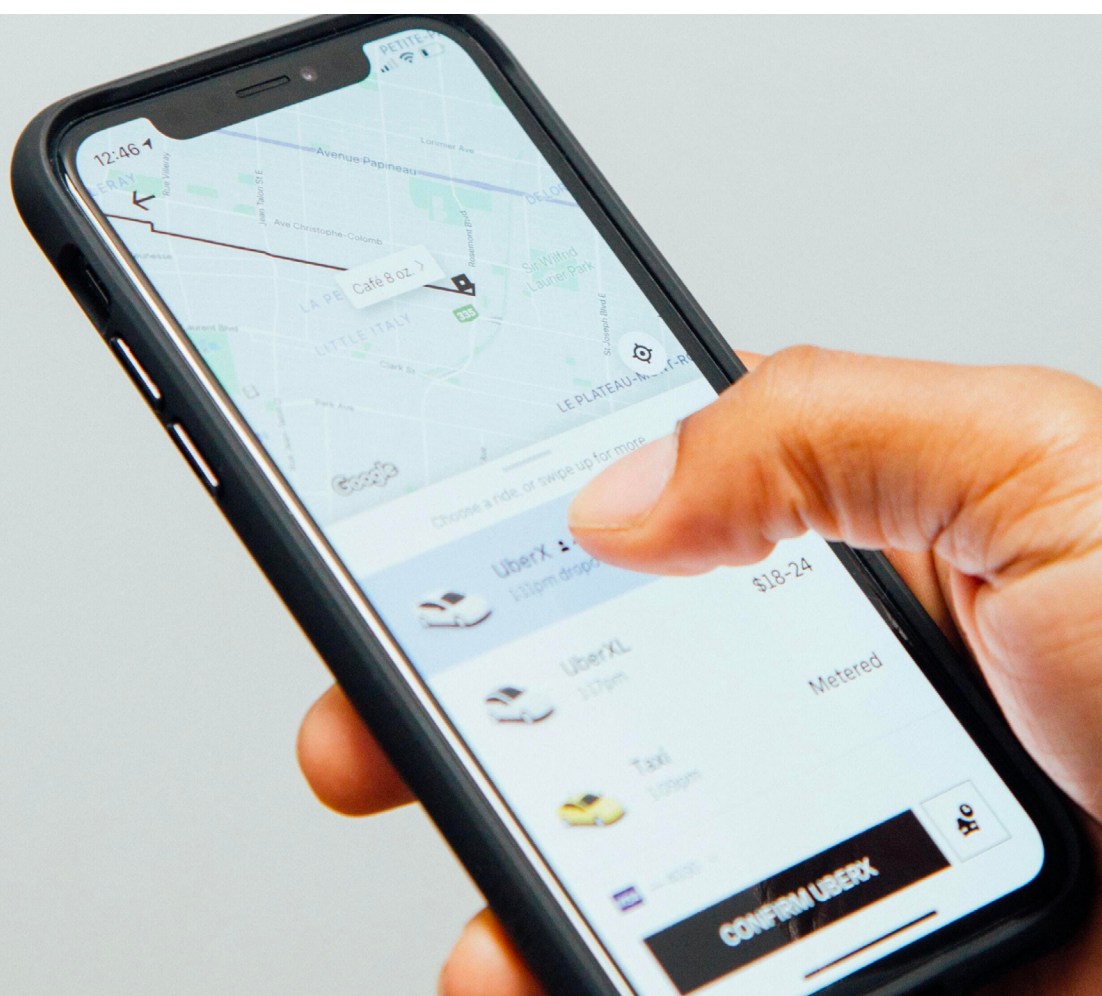
Support Performance Index

To measure the quality of customer support, Netomi's research team leveraged a proprietary index: the Support Performance Index (SPI). This is a 100-point scale that is a composite of the scores achieved on each of the four channels examined in the study, with app scores weighted at 25%, social media (Instagram, I-SPI and Twitter, T-SPI) each weighted at 10%, phone scores weighted at 30%, and email at 25%. Weightings were determined based on the likelihood of contact (i.e. as a channel, phone was assigned the heaviest weighting, as statistics show that it is the most consistent way of receiving a reliable response, based on both SPI and response rate).

SPI Makeup

| Weight	Channel		
30%	Phone-SPI	50.0%	Response time
		20.0%	# of times redirected
		20.0%	Agent handoff
		10.0%	Call back
25%	App-SPI	40.0%	Response time
		30.0%	Question answered
		10.0%	Accuracy & experience
		10.0%	Accessibility
		10.0%	Automated response
25%	Email -SPI	40.0%	Response time
		30.0%	Ticket resolved
		10.0%	Personal greeting & agent sign-off
		10.0%	Accuracy & experience
		5.0%	Automated response
		10.0%	Follow up (bonus points)
20%	Social-SPI	45.0%	Response time
		35.0%	Ticket resolved
		10.0%	Accuracy & experience
		10.0%	Personal greeting
		5.0%	Additional information requested & links provided (bonus points)
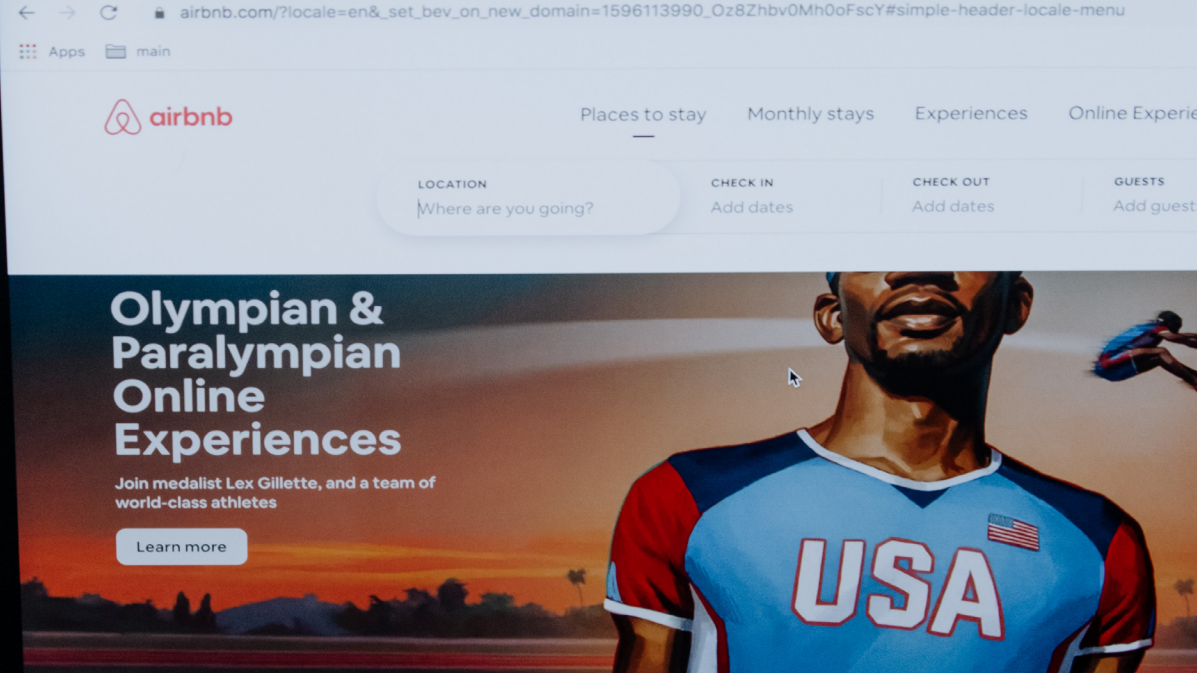
The Findings

Airbnb shines on social media

In perhaps a reflection of modern times, and digitally savvy gig economy players, social media is standing out as a channel, as 70 of the 87 companies in this study have an Instagram account.

Shockingly, **66% of companies ignore direct messages (DM's) received through Instagram**, indicating that this channel is primarily used as a platform for marketing and brand exposure rather than one for customer support.

70

companies have an Instagram account

66%

of companies ignore DM's on Instagram
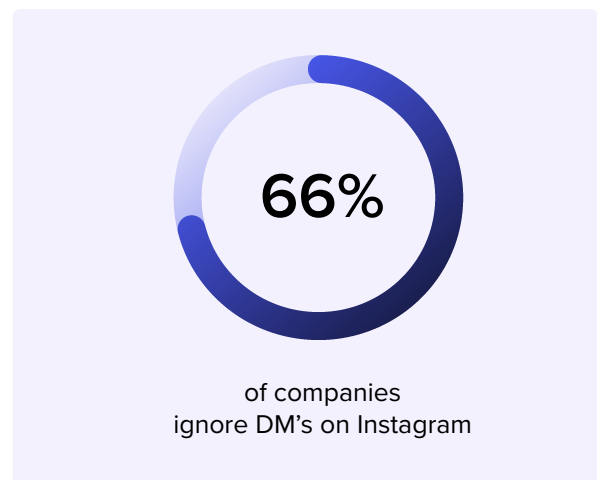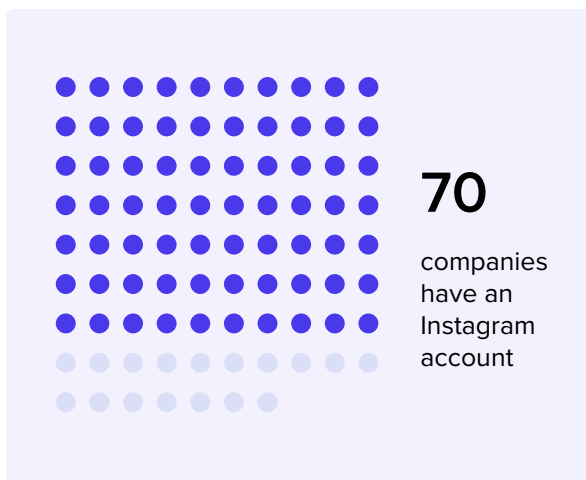
Although our research discovered that, in comparison, fewer companies (54, or 62%) have Twitter accounts, this is a better medium of communication for customer service, as 69% of those companies responded to Twitter DM's.

62%

of companies have
Twitter accounts
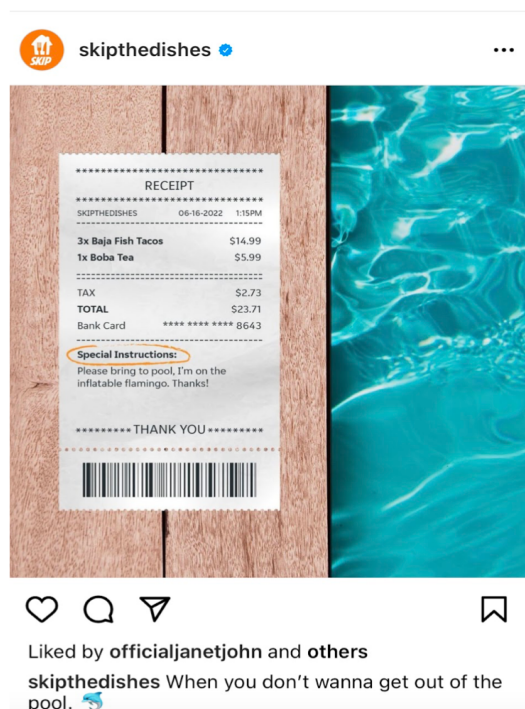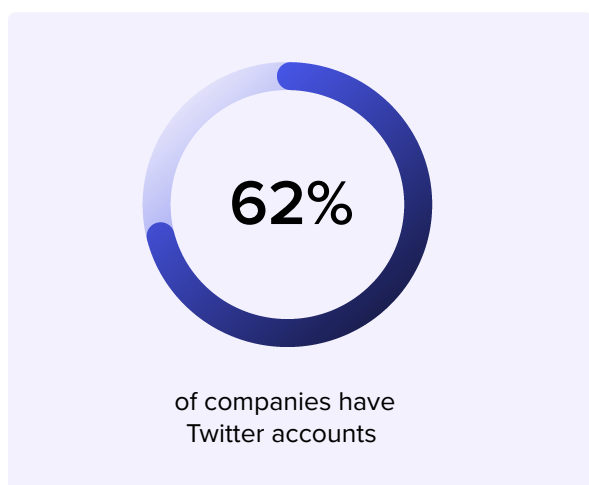
An Instagram post from @skipthedishes

It is also superior in regards to wait times - wait times on Twitter average 359 minutes (5.9 hours), with the quickest response time being 2 minutes and the longest response time 2,803 minutes (47 hours). This is compared to an average wait time of 1,843 minutes (30.7 hours) on Instagram, with the shortest wait time being two minutes, and the longest 5794 minutes (97 hours).

5.9 hours
avarage time
for agent to answer

2 minutes
quickest
response time

47 hours
longest
response time

Personalized responses received:

 Instagram 50%

 Twitter 76%

We also found responses received via Twitter to be more in-depth and endowed with phrases that connote empathy, such as 'we appreciate you reaching out and sharing your insight with us!'

Hi William, are you asking about payment for the background check?

An example of a nebulous Instagram response

Hey William, thank you so much for contacting us. If you are not satisfied or have any issues, we will make it right. You can request full refunds or we will be able to provide you with a replacement booking in order to get the job done.

An example of a thorough and personalized Twitter response

Airbnb featured the best social media experience, scoring 102.1 on the I-SPI and 99.5 on the T-SPI, for an overall S-SPI of 100.8. In addition to having a presence on four out of the five channels (email being the exclusion), the responses received from the popular vacation rental platform were personalized, accurate, and delivered in a timely manner. Airbnb was followed by Instacart (S-SPI, 97.0) and Deliveroo (S-SPI, 95.9).

Thank you for reaching out to us, William. Airbnb supports different payment methods, depending on the country your payment account is located in. In most countries, Amex is available as one of the payment options accepted by Airbnb while cash is not included. More info here: http://air.do/62345 We hope this helps. Let us know if you have additional questions.

An Instagram response from Airbnb

Hi William, and thank you for your message. Please have a look here it find out what payment methods are accepted: http://air.do/62345 Let us know if you have additional queries. Thanks.

Thank you for contacting Airbnb on social media! We hope we have answered your request. If there's anything else we can do, please send us your question by replying to this message. Otherwise we are always looking for ways to improve and appreciate any feedback you may have.

A Twitter response from Airbnb

Rank	Company Name	S-SPI	I-SPI	T-SPI
01	airbnb	100.8	102.1	99.5
02	instacart	97.0	100.4	93.6
03	deliveroo	95.9	99.8	91.9
04	Shipt	95.5	93.6	97.3
05	goPuff	95.3	93.3	97.3
06	BLACKLANE	91.8	96.4	87.1
07	Thumbtack	90.5	85.2	95.7
08	FAVOR	72.0	50.0	94.0
09	Upwork	71.7	57.5	85.8
10	Rover	67.7	95.2	40.2

For email customer support, ride-sharing and delivery companies are leading the pack

A tried and true communication channel, previous research from Netomi found that, when an issue or question arises,

47%

of people prefer to contact a company for customer service via email than any other channel.

Email is preferable for several reasons - for one, it's inherently convenient because the entire interaction is on the customer's terms, and it's also not necessary for a customer to wait on hold or interact with a live agent in real-time.

Frequently used in the daily personal and professional lives of many, email is readily available across all of our devices. Additionally, with email, there is a record of the conversation that can be referenced at any time.

For gig economy companies, email stands as a reliable channel for customers to contact support teams, with 50 of the 87 companies (57%) having a support email address, with an overall response rate of 70%, and 40% of those companies having an automated response message that is sent. Nine companies, including Fiverr, Foodora and UpCounsel, use email as their only channel for customer service.

What's more, 17 companies scored well on accuracy - meaning that they provided a thorough email response that provided relevant information to the question asked. Alternatively, if the support agent did not fully understand the query or required more information, the customer would be asked to provide additional information or clarification.

Relevancy of response is key - as, if a response is not at all relevant, the customer either winds up reaching out yet again for support, or simply giving up, resulting in higher ticket volumes for support teams and higher customer frustration.

Email wait times average 3 hours (185 minutes) across all companies and industries, with the marketplace, caregiving and delivery industries topping the charts for longest wait times.
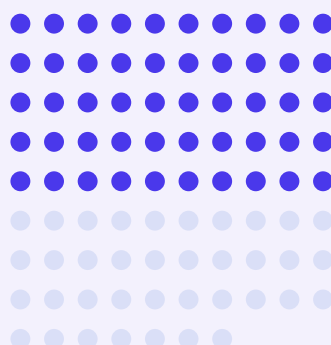
50
companies have a support email address
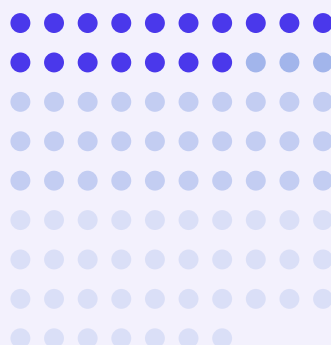
17
companies scored well on accuracy

185 minutes
average email wait time

Of the email responses we received, 12 (35%) were personalized, meaning that the customer (us) was addressed by their first name.

35%

Personalization is a key component of brand interactions today:

70% of consumers want companies to personalize their communications

45% of customers say that personalization influences their brand loyalty

This personalization can later be extended to proactive customer communication, but from the initial moments in the interaction, it's the little things - like being greeted by our first name - that counts.

Longest wait times by industry

Marketplace	13 hours, 27 minutes
Caregiving	3 hours, 34 minutes
Delivery	2 hours, 17 minutes
Ride sharing	1 hour, 30 minutes
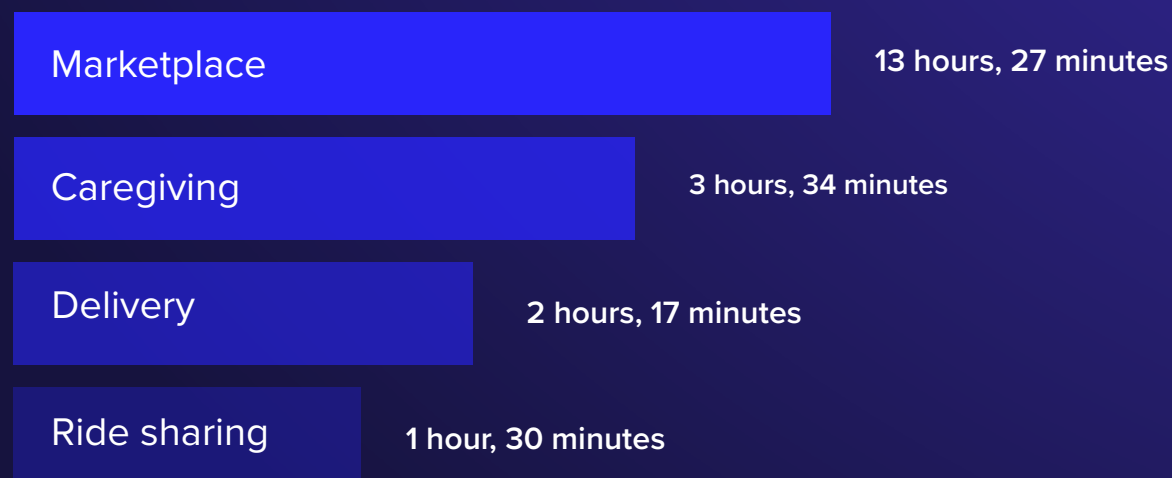
Fastest Responders

(non-automated emails)

2 minutes	Wolt
7 minutes	upcounsel
8 minutes	Shipt CitySprint

Rank	Name	E-SPI
01	Toptal	104.7
02	Your Mechanic	91.6
03	wingz	83.4
04	PIMLICO	83.3
05	FREENOW	73.5
06	EatStreet	69.9
07	deliveroo	67.2
08	fiverr.	60.9
09	lime	60.5
10	kaggle	60.1

Refund → Inbox ×

From: Shipt
To: will1234@gmail.com

Hi Will, Thanks for reaching out!
If you place an order through Shipt and you received wrong or damage items, we can refund or credit you for the items. That credit will last 90 days and will be automatically applied to your next order. The same goes for missing items as well.

If after your first order you decide you no longer want to use Shipt, we can cancel your membership and refund you the yearly or monthly fee. Whichever is applicable for you.

Let us know if you have further questions!

For more immediate response, you can also give us a call at 205-502-2500 or open up a LiveChat by going to help.shipt.com.

An example of an personalized email response from Shipt

Phone is the most promising channel to receive customer service with wait times heavily skewed

The original channel for customer support, the phone still stands as the best option for customers to contact gig economy companies, in terms of availability as well as response time, as the SPI average is 76.3, with a 63% response rate.

Perhaps signaling a shift towards the prioritization of other channels as new mediums for support conversations to take place, our team found several phone numbers to be invalid, and in a few instances, we were immediately directed to the company's live chat function. On the other hand, some companies may be a bit too reliant on this traditional channel - in fact, 12 companies, including 99Designs, ChowNow, and DoorDash, only use phone as a channel for effortless customer service communication.

Companies that only offer phone as a support channel:

99designs

ADDISON LEE

Care.com

CATALANT

ChowNow

Delivery Hero

DOORDASH

FIELD NATION

GURU

HomeAdvisor

* Although DoorDash does offer chat within its app, it is fairly complicated and not readily accessible

Wait times also vary, 11 minutes being the average time for an agent to answer, but agents can also answer quite quickly - within a span of 1.5 minutes, as was the case for delivery service company Shipt.

This variability means that only a small portion of companies have lengthy wait times, a factor that significantly drives up the average wait time among all companies. The longest wait time was 83 minutes.

11 minutes
avarage time
for agent to answer

1.5 minutes
shortest
waiting time

83 minutes
longest
waiting time
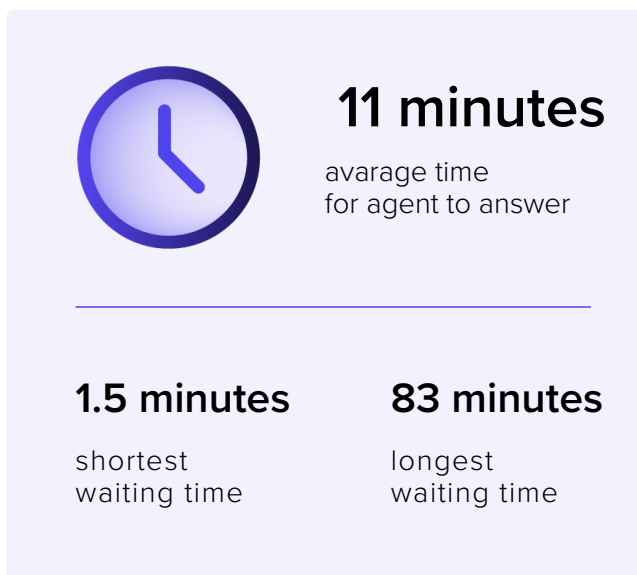
With a score of 99.2 on the P-SPI, the freelancing platform Toptal tops the chart with a 1-minute wait time, no redirect, and a callback option, followed by delivery platform Instacart (93.9), and home service platform Porch (89.9).

Rank	Company Name	P-SPI
01	Toptal.	99.2
02	instacart	93.9
03	Porch	89.9
04	SPIN	89.9
05	GURU	89.7
06	DRIZLY	89.6
07	Uber	89.6
08	Uber Eats	89.6
09	Upwork	89.6
10	Alfred	89.5

Ride-sharing and delivery platforms are the most likely to offer an app, yet for all companies, the option for in-app and live chat is few and far between

As many customers today spend a large portion of their time on mobile devices (each day, Americans spend an average of 5 hours and 24 minutes on their mobile device), apps are an ideal channel for companies to easily connect with their customers, and strengthen their brand image by remaining visible whenever customers scroll through their phones.

For many gig economy platforms, the app is the sole interaction channel (for instance, the Uber app is essential to order for customers to schedule an Uber ride) so one would think that support via this channel would be readily accessible across companies, right?

We discovered that this is not always the case, our research found that, while

59% of the companies have an app

28% of them provide an easily accessible direct messaging feature
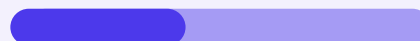
Our research revealed that numerous companies do not offer an in-app chat option or an available agent with whom to communicate, and sometimes, users are simply redirected to the company's webpage. Directing users to yet another channel, where they will likely need to re-start their conversation, results in a frustrating user experience, and one that takes more time and effort on the part of the customer. This is why an omnichannel experience is critical - one that enables a customer to interchange devices and fluidly move between channels, carrying context forward with every interaction.

Not only should companies provide support across a multitude of channels - but these touchpoints should also be integrated, to ensure a seamless journey throughout.

Allowing customers to easily communicate with companies in real-time, in-app chat has emerged as a popular offering that customers have grown to desire and expect, with 79% of customers even saying that they prefer to chat with agents solely due to the immediacy it offers in comparison with other channels.

79%

of customers prefer to chat
with agents solely
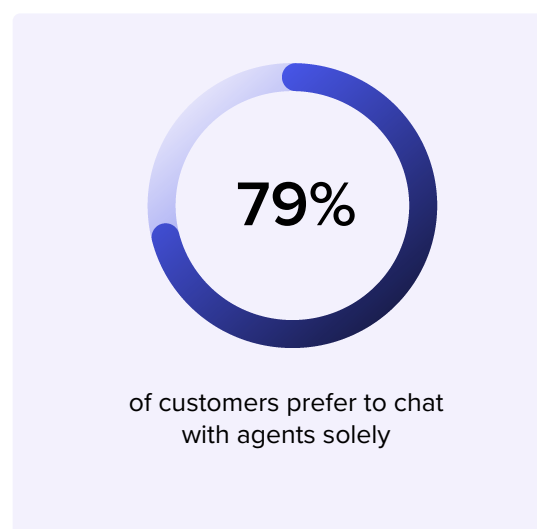
Rank	Company Name	A-SPI
01	EatStreet	98.7
02	getir	98.4
03	TaskRabbit	98.0
04	airbnb	96.7
05	soothe	89.8
06	Gett.	67.2
07	goPuff	63.2
08	Getaround	62.1
09	wingz	54.8
10	GRUBHUB	54.4

Airbnb almost provides the best cross-channel support

Our analysis took into account various elements of quality customer service, including accessibility, response time, and accuracy in response provided. While Airbnb received the highest overall SPI score, support does not necessarily extend to all channels, however - the company scored near-perfect marks in the app (96.7), phone (88.6) and social media (100.8) categories, yet poorly on email (the email we sent to the company bounced).
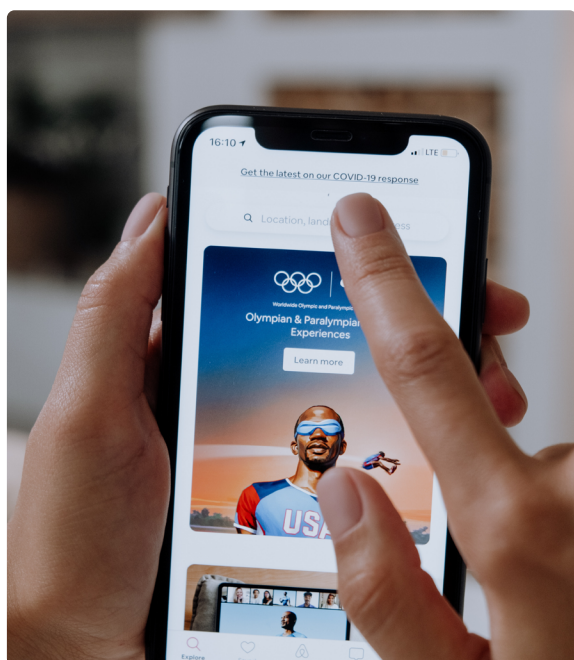
Meanwhile, Wingz, the silver medalist, provides the best cross-channel support across Twitter, phone, app and email, yet its lack of Instagram presence meant that it scored poorly in this category. The vehicle for hire company platform is followed by EatStreet (67.5), GrubHub (61.5) and Toptal (61.3).

Rank	Name	SPI
01	airbnb	70.9
02	wingz	69.2
03	EatStreet	67.5
04	GRUBHUB	61.5
05	Toptal	61.3
06	goPuff	58.6
07	deliveroo	57.9
08	getir	57.2
09	Shipt	56.0
10	Your Mechanic	48.3
11	instacart	47.6
12	PIMLICO	45.5
13	delivery.com	44.2
14	BLACKLANE	41.9
15	Upwork	41.2
16	Lime	40.4
17	Alfred	40.3
18	CitySprint	39.2
19	peopleperhour	39.1
20	Rover	38.8

Conclusion

Providing top-notch customer service - and an overall customer experience - is vital across all industries, from travel and hospitality to retail, eCommerce and telecommunications. This CX expectation also extends to all players involved in the gig economy:

As their pay is contingent on them completing a job or task - a 'gig'- it is critical that freelancers, contract and temporary workers receive swift, frictionless, and real-time support. For instance, an app's GPS directions may not be functioning correctly when a driver is trying to navigate through busy city streets to locate a passenger to pick up.

Customers expect quick and personalized support, and these expectations are possibly heightened for customers of gig economy platforms, as they are characterized by their 'on demand' attributes ("I was mistakenly delivered the wrong order and I want my Margherita pizza right now)!"

With more and more individuals turning to gig economy platforms as both a source of income and a source of groceries, among other goods and services, there is bound to be an influx of support-related queries that follow, and support teams must rise up to keep this burgeoning economy running smoothly. What's more, demand is often driven by external factors, with today's skyrocketing gas prices, for instance, some drivers of ridesharing platforms have cut back on driving, while others are reporting being busier than ever. How can customer support teams handle these spikes in demand, when they arise?

To meet the needs of today's digitally-savvy customers, it is essential for gig economy platforms to adopt modern AI tools to scale their operations across channels - providing an integrated and cohesive experience across multiple devices - a multichannel experience.

Herein lies the essence of a multichannel experience - with context that is carried forward throughout channels, customers should not need to repeat themselves, or restart a task, whether they reach out via Twitter, email, or another channel. As this customer service benchmark report highlighted, too often, companies dedicate their customer support efforts to one or more channels (and, in some cases, only one).

Thus, putting all eggs into one's proverbial customer support basket may not be the way forward.

A strong support strategy that spans multiple channels and touchpoints will, in turn, reduce wait times and result in even faster service for the new nine to fivers and those whom they serve.

Glossary of Terms

A-SPI - The score assigned to a company's customer service performance via in-app, easy chat solutions as a support channel.

E-SPI - The score assigned to a company's customer service performance via email as a support channel.

I-SPI - The score assigned to a company's customer service performance via Instagram as a support channel.

P-SPI - The score assigned to a company's customer service performance via phone as a support channel.

S-SPI - The score assigned to a company's customer service performance via two social media platforms (Instagram and Twitter) as channels.

T-SPI - The score assigned to a company's customer service performance via Twitter as a support channel.

List of Gig Economy Companies

99designs
Addison Lee
Airbnb
Alfred
Andela
Aquent
Behance
Bellhop
BlaBlaCar
Blacklane
Bolt
Cabify
Care.com
Cargomatic
Catalant
Caviar
ChowNow
CitySprint
Curb
Deliveroo
Delivery
Delivery Hero
DoorDash
DPD Group
Drizly
EatStreet
Etsy
FAVOR
Field Nation
Fiverr
FlexJobs
Foodora
Foodpanda
FREE NOW
Freelance Law

Freelance.com
Getaround
Getir
Gett
Gigster
Glovo
goPuff
GreenPal
GrubHub
Guru
Handy
HomeAdvisor
HopSkipDrive
InnoCentive
Instacart
Just Eat Takeaway.com
Kaggle
LegalZoom
Lifealike
Lime
LiveOps
Lyft
Munchery
Nomad Health
PeoplePerHour
Pimlico Plumbers
Porch
Postmates
Quiqup
Rocket Lawyer
Rover
Shipt
SkipTheDishes
Soothe
Spin

Talkspace
TaskRabbit
Thumbtack
Toptal
Turo
Uber
Uber Eats
UK Mail Group
UpCounsel
Upwork
UrbanSitter
Via Transportation
Wag!
Wingz
Wolt
Yodel
YourMechanic