

A Research Initiative from

European Contact Centre
& Customer Service
EXCHANGE

Supporting Partner

odigo

Voice of the **European** **Contact Centre Consumer**

Summer 2023



Tracking the contact needs and expectations of people across Europe

Each year, the CCMA (Call Centre Management Association) conducts a comprehensive study into in UK consumer contact experience: Voice of the Contact Centre Consumer. The research series uncovers how customer contact needs, expectations and behaviours are evolving. For 2023 the CCMA and ECCCE (European Contact Centre & Customer Service

Exchange) are delighted to expand the study to cover Belgium, France, Germany, Netherlands and Spain in addition to the UK. Supported by Odigo, CCMA and ECCCE's Voice of the European Contact Centre Consumer research provides insights for contact centre leaders across the continent to inform a wide range of strategies.

Research methodology

The Voice of the European Contact Centre Consumer 2023 research comprised two distinct phases.

In the first phase n=6,000 online interviews were conducted comprising:

- N=2,000 consumers in the UK from 3-13 March 2023
- N=1,000 consumers in France, Germany and Spain each from 7-13 March 2023
- N=500 consumers in Belgium and Netherlands each from 7-13 March 2023



Quotas were set by age, gender and region in each country to ensure a nationally-representative sample. When reporting at the 'All countries' level, weighting factors were applied so that each country carries equal weight.

In the second phase, we shared findings from the consumer survey in discussion with contact centre leaders from across Europe and the UK, who provided commentary and context.

With thanks to

We invited contact centre leaders representing a diverse mix of vertical markets, contact centre types and experiences to a series of discussions to explore the themes uncovered in the consumer survey. On behalf of ECCCE, the CCMA and Odigo extend sincere thanks to these individuals for their generous participation in the study.

Giulio Castiglioni, Head of Customer Care, Playtomic

Sophie Chelmick, EVP EMEA, TDCX

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

Davide de Fano, Customer Interaction Manager, Bosch Thermotechnology

Steven Lee, Director of Consumer & Shopper Engagement EMEA, LEGO Group

Nawal Lyazidi, Manager, Continental Europe, Assurant

Eugen Majeri, Digital Service Manager, Panasonic Europe

Berit Rodwell, Manager, International Contact Centre, Carnival UK

Naomi Smith, Contact Centre Manager, Bosch Thermotechnology

Mariana Victorino, Head of EMEA Communications, Foundever

Working in parallel

The Voice of the Contact Centre Consumer research has for years been the definitive source of consumer understanding for our industry in the UK. For 2023 we are delighted to present exciting findings that cover not only the UK but also Belgium, France, Germany, Netherlands and Spain.

This research reveals how a challenging economic and political environment is taking its toll across Europe and the UK. Although there are some differences between countries which are primarily driven by different levels of market maturity, overall patterns are remarkably similar.

In a time of widespread uncertainty and financial constraint, more than ever people all across the continent need and expect timely

resolution to their queries and problems. There is overwhelming evidence that regardless of whether or not service standards are objectively improving, we are not keeping up with consumer expectations.

This research is an urgent reminder of why organisations across Europe and the UK must continue investing in the customer experience and the contact experience, and to place the customer at the centre of everything that they do.



Leigh Hopwood,

Managing Director, European Contact Centre & Customer Service Exchange
CEO, CCMA | Call Centre Management Association UK

We're pleased to support the work of the CCMA and ECCCSE as they provide a clear view of the Contact Centre Consumer trends in Europe today. As a European provider, we see first-hand how needs fluctuate between demographics and industries, but data is the only way to make sense of these measurable differences and implement impactful decisions. Against a backdrop of prolonged uncertainty, financial challenge and differing levels of new technology adoption, consumer expectations are rising. This particularly impacts government and utility sector contact centres who are facing high volumes of complex requests in the current conditions.

To keep up with growing expectations and an intense need for enhanced support, contact centre strategy needs to cater to numerous consumer profiles. There also needs to be the

right balance of digital journeys and agent-led interactions with the best-suited advisor.

Success will depend on leadership in the field of customer experience, based on the capacity to listen to consumers, qualify and predict their needs as well as supporting agents with powerful CCaaS solutions driven by AI and data.

Our thanks to the participants and professionals who contributed to this research. Whether you are meeting the needs of your own citizens or those from multiple countries it's our hope that this data will inspire you to make bold decisions to better serve your customers.



Melissa Cowdry

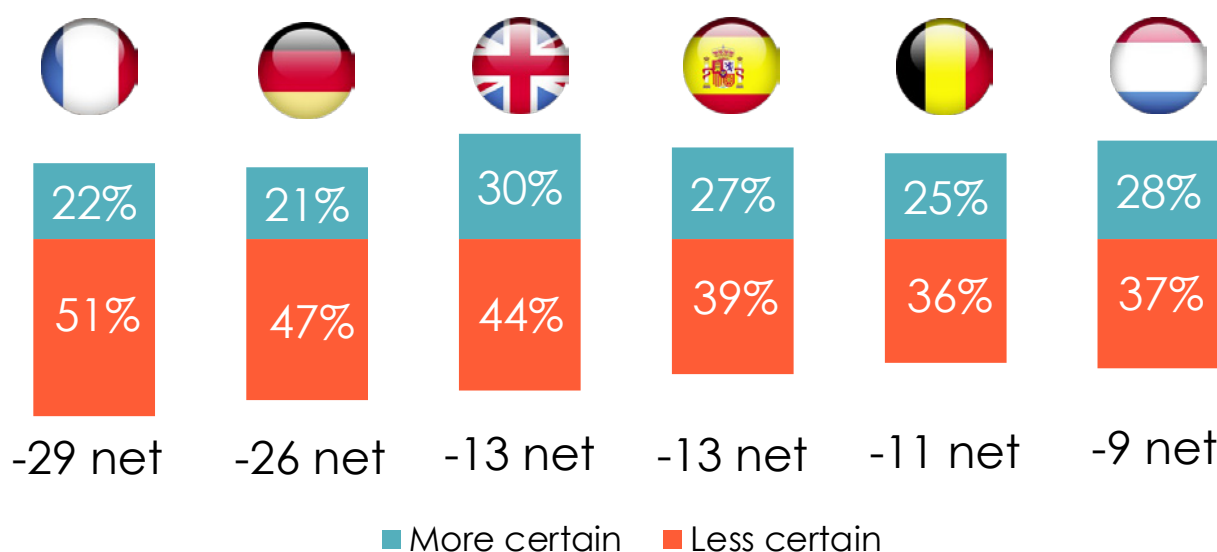
Director of Field Marketing, Odigo

Europeans face growing uncertainty and financial difficulty

The past 12 months has brought to Europe economic pressures, political upheaval and war. It is therefore not surprising that a sense of

uncertainty prevails across the continent, as Figure 1 illustrates.

Figure 1: Would you say you feel more certain about the future, less certain about the future, or about the same compared with 12 months ago, generally speaking? [Note: numbers shown may not add up exactly due to rounding].



Base: UK n=2,000, France n=1,000, Germany n=1,000, Spain n=1,000, Netherlands n=500, Belgium n=500

Of the six nations included in the Voice of the European Contact Centre Consumer research, it is in France and in Germany where people feel the least certain about the future:

the gap between 'certain' and 'uncertain' is 29 percentage points in France and 26 percentage points in Germany.

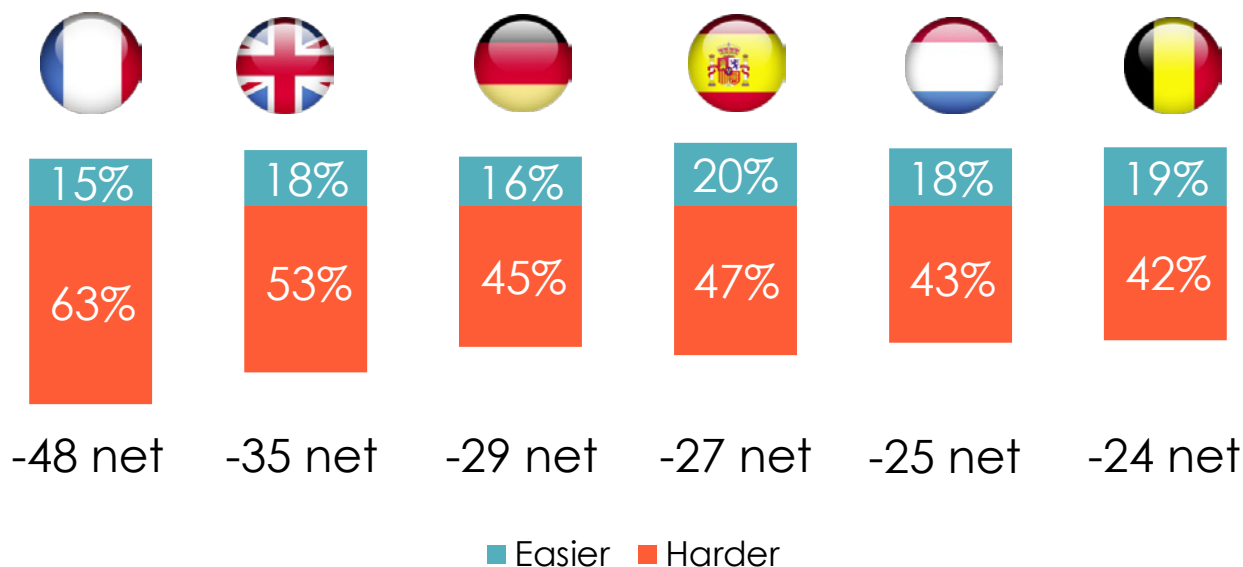
"In France the government takes care of a lot more things when compared to other countries. For example, energy bills didn't increase as much as they did in the UK last year. Whilst this is welcomed by French customers, it also introduces more dependency on the government and its policies."

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

The rising cost of living is taking a toll across Europe. As Figure 2 shows, in all six markets many people report that it has become harder to manage their finances, with the

highest numbers observed in France (63% say it's become harder to manage finances) and the UK (53%).

Figure 2: Would you say that you find it harder or easier to manage your finances today compared with 12 months ago, or about the same? [Note: numbers shown may not add up exactly due to rounding].



Base: UK n=2,000, France n=1,000, Germany n=1,000, Spain n=1,000, Netherlands n=500, Belgium n=500

“If you cast your mind back to just after the pandemic in the UK, there was a lot of movement in the job market as competition for skilled staff was very high. Many people used this opportunity to move jobs and increase their salary. That trend has now slowed down a lot. People are now thinking ‘I need to keep a stable job and save some money in case something happens.’”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

Uncertainty about the future, exacerbated by rising costs, directly impacts contact centres

as people turn to their providers for help and reassurance.

Global pressures are impacting customer expectations

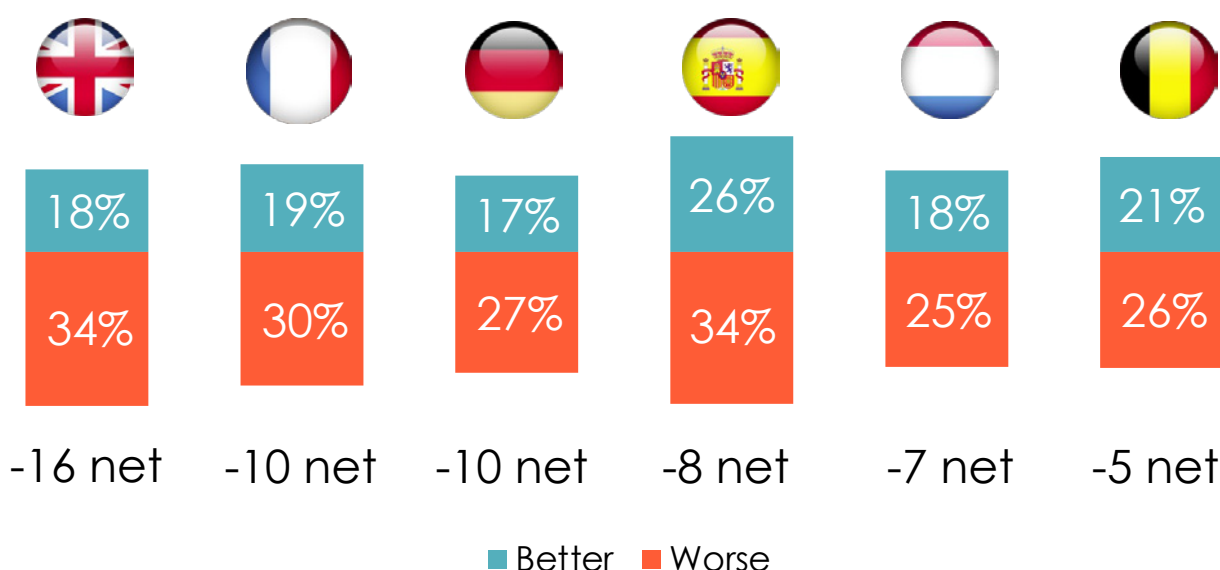
Voice of the European Contact Centre Consumer 2023 presents clear evidence that customer expectations, influenced by external pressures, have accelerated quicker than providers' ability to meet them. As Figure 3 shows, in each of the six markets

the proportion of people who say customer service is getting worse is larger than the proportion who say customer service is improving.

The gap is biggest in the UK (34% say worsened versus 18% say improved).

In Belgium, France, Germany, the Netherlands, Spain and the UK more people think customer service is getting worse than think it is getting better.

Figure 3: Would you say that customer service today has improved, worsened or stayed the same since compared with 12 months ago? [Note: numbers shown may not add up exactly due to rounding].



Base: UK n=2,000, France n=1,000, Germany n=1,000, Spain n=1,000, Netherlands n=500, Belgium n=500

"I think there's a lack of investment in on-boarding and training people. Companies have made shortcuts in order to get people up and running as quickly as possible."

Steven Lee, Director of Consumer & Shopper Engagement EMEA, LEGO Group

“Consumer attitudes have changed since Covid. I call it a sense of entitlement. Even though we’re trying to deliver the same or better quality of service, it is not always received as such because expectations have shifted.”

Berit Rodwell, Manager, International Contact Centre, Carnival UK

“In the UK there is a lot of offshoring of contact centres. This is often is not well received by customers.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

Cultural differences in response patterns

Differing scores across countries are attributed to different expectations driven by market maturity. The UK for example is the third-largest e-commerce market in the world after China and the US¹, and the largest in Europe.² With a high level of familiarity with digital experiences, it follows that the UK is a market

with relatively high customer expectations.

Furthermore cultural biases in CX survey responses are a well-documented phenomenon, with Northern European countries tending to show lower scores than Southern European ones.³

“The NPS scores in a programme I used to run consistently trended lower in France and Germany irrespective of interaction outcomes and when compared to other countries, suggesting that cultural nuances as well as customer expectations matter.”

Sophie Chelmick, EVP EMEA, TDCX

“We support over 20 different countries. Usually Spain has the highest NPS of all.”

Eugen Majeri, Digital Service Manager, Panasonic Europe

¹ <https://www.shopify.com/enterprise/global-ecommerce-statistics>

² <https://www.statista.com/topics/2333/e-commerce-in-the-united-kingdom/>

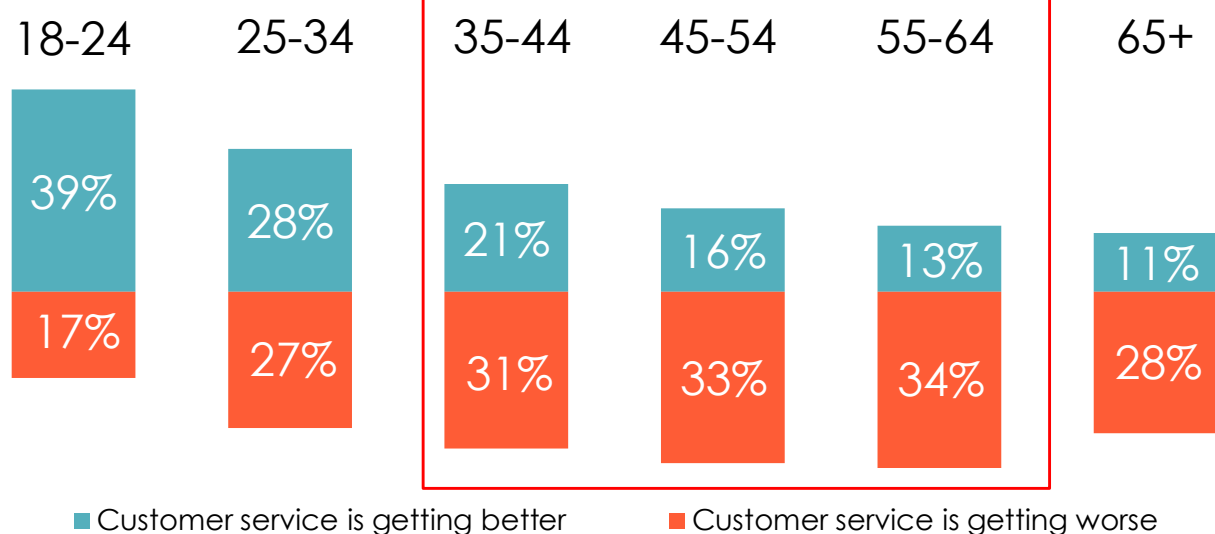
³ <https://www.ipsos.com/sites/default/files/ct/publication/documents/2018-07/cultural-bias-2020-ipsos.pdf>

Perceptions of customer service differ by life stage

When reporting survey results, aggregated scores hide important differences between cohorts. Figure 4 shows that perceptions of customer service vary widely by age group

across Europe, with people in their twenties and younger tending to be more positive and people aged 45-64 being the least positive.

Figure 4: Would you say that customer service has improved, worsened or stayed the same in the past 12 months, generally speaking? [BY AGE GROUP].



Base: 18-24 n=641, 25-34 n=949, 35-44 n=1,101, 45-54 n=1,108, 55-64 n=1,011, 65+ n=1,190

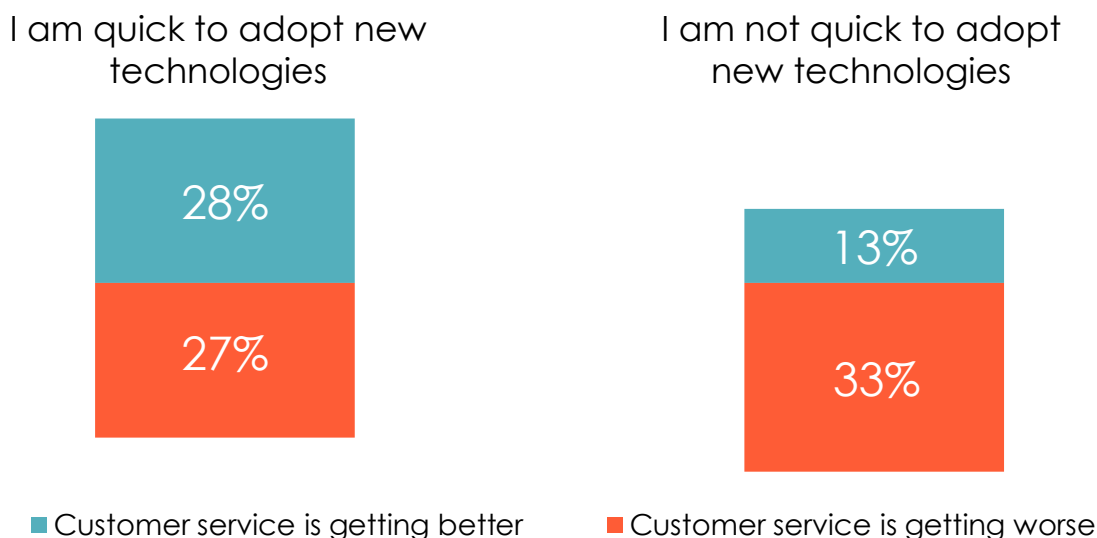
“As I grow older, I expect a lot more from companies. I also spend more with companies and naturally that brings added expectations as well.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

As providers across Europe roll out digital channels and self-service, new contact methods tend to favour the technologically adept. As Figure 5 reveals, people who consider themselves to be early technology

adopters are more than twice as likely to think that customer service is getting better (28%), compared with people who do not consider themselves to be early adopters (13%).

Figure 5: Would you say that customer service has improved, worsened or stayed the same in the past 12 months, generally speaking? VS Would you say that you are someone who is quick to adopt new technologies such as contacting organisations online or via apps, generally speaking?

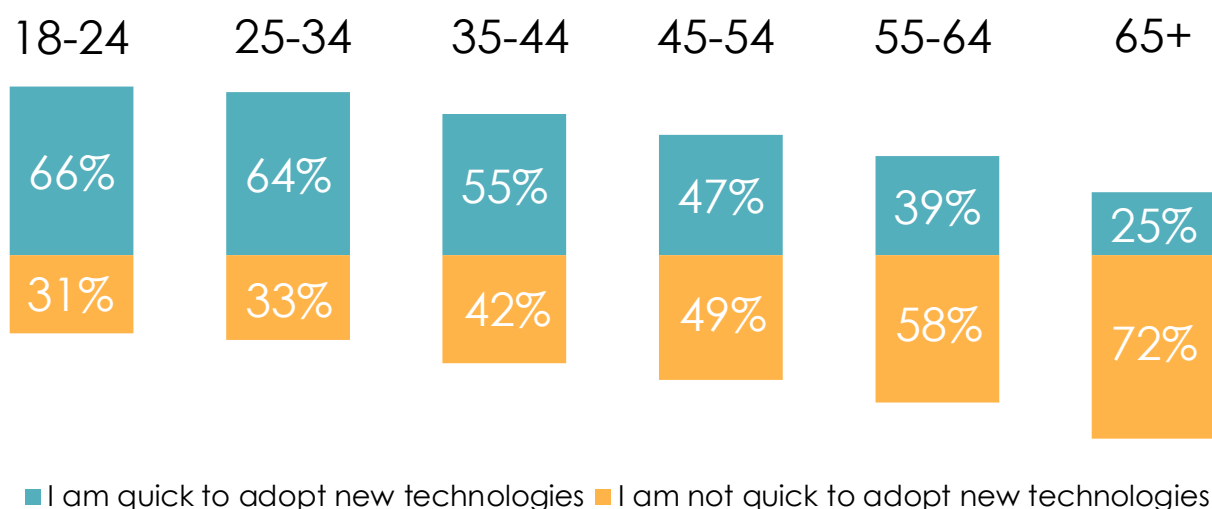


Base: quick to adopt n=2,920, not quick to adopt n=2,907

And as Figure 6 shows, early technology adoption is closely correlated with age with younger people more likely to consider themselves early adopters. For example, 66%

of people aged 18-24 and 64% of those aged 25-34 consider themselves early technology adopters, compared with just 25% of those aged 65+

Figure 6: Would you say that you are someone who is quick to adopt new technologies such as contacting organisations online or via apps, generally speaking? [BY AGE GROUP].



Base: 18-24 n=641, 25-34 n=949, 35-44 n=1,101, 45-54 n=1,108, 55-64 n=1,011, 65+ n=1,190

"The 18-24 and 25-34 groups are naturally aligned with what's on offer right now. Things are much more self-explanatory to younger cohorts because they are using these channels all the time. It's not necessarily that older cohorts reject the channels, it's just they need more convincing."

Sophie Chelmick, EVP EMEA, TDCX

Financial hardship also impacts perceptions of service

Technology adoption is not the only factor that accounts for differing perceptions of

customer service across age cohorts. Financial constraint is also playing a part.

49% of people across Belgium, France, Germany, the Netherlands, Spain and the UK say it's harder to manage their finances today than 12 months ago versus, 30% who report no change and 17% who say it's become easier.

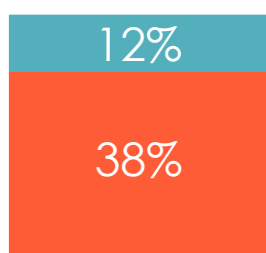
People who are finding it more difficult to manage their finances tend to take a more negative view of customer service.

With one out of every two adults across the six countries reporting growing difficulty in managing their finances, the knock-on effect on customer expectations is illustrated

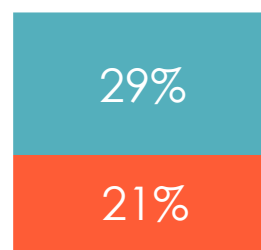
in Figure 7: consumers who are finding it more difficult than before to manage their finances tend to take a more negative view of customer service.

Figure 7: Would you say that customer service has improved, worsened or stayed the same in the past 12 months, generally speaking? VS Would you say that you find it harder or easier to manage your finances today compared with 12 months ago, or about the same?

Harder to manage finances today than 12 months ago



Not harder to manage finances today



■ Customer service is getting better

■ Customer service is getting worse

Base: harder to manage finances n=3,022, not harder to manage finances n=2,844

“People who are struggling with the management of their finances may also be more vulnerable and less able to source solutions. They may be especially in need of help.”

Giulio Castiglioni, Head of Customer Care, Playtomic

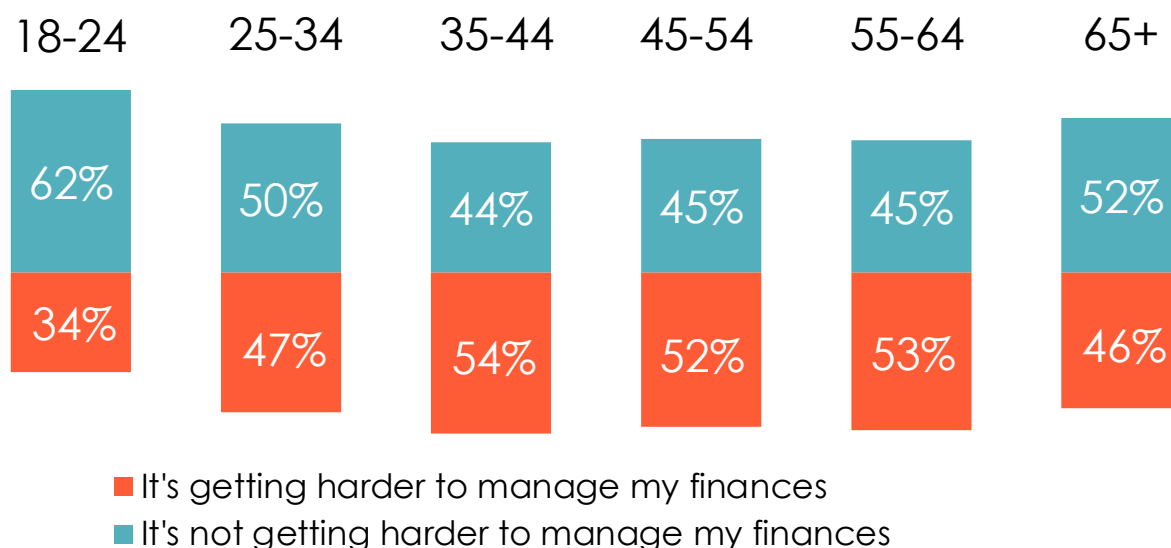
“If you're struggling with money, the last thing that you want to struggle with is contacting Customer Services departments as well.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

People aged 35-64 are feeling the greatest pressure on their outgoings, as evidenced in Figure 8, which can be explained by this

group being more likely to have dependents and mortgages compared to younger and older cohorts.

Figure 8: Would you say that you find it harder or easier to manage your finances today compared with 12 months ago, or about the same? [BY AGE GROUP].



Base: 18-24 n=641, 25-34 n=949, 35-44 n=1,101, 45-54 n=1,108, 55-64 n=1,011, 65+ n=1,190

As difficulty in managing their finances grows for many, so does the expectation for providers to help. It is no coincidence that

35-64s are more likely to report increasing financial difficulty and also exhibit the most negative perceptions of customer service.







Rising expectations and a growing satisfaction gap are especially apparent in utilities and government

Big variations in customer service ratings are observed between industries and between countries. However, in every country the lowest ratings are given to government and utilities, as shown in Figure 9. In Spain banks also attract notably low ratings.

The lower scores for government and utilities may be at least partially attributed to the

current period of economic difficulty, with energy bills rising and more people turning to local and central governments to help with the cost of living. Regardless of the actual quality of service delivery, it is difficult to keep up with the growing complexity and urgency of customer needs.

Figure 9: Would you say that customer service today from [...] has improved, worsened or stayed the same in the past 12 months, generally speaking? [Net scores – improved % minus worsened %, lower scores in red and higher scores in green].

						
Banks	-3%	-10%	-14%	-32%	-8%	-14%
Utilities	-27%	-22%	-23%	-23%	-21%	-22%
Insurance	-5%	-10%	-3%	-6%	-5%	-3%
Government	-33%	-33%	-23%	-36%	-15%	-14%
Retail	-4%	-9%	-6%	11%	1%	-1%
Mobile/broadband	-4%	-6%	1%	-2%	3%	5%
Train/bus	-20%	-20%	-20%	0%	-14%	-7%
Airlines	-3%	-9%	-7%	-7%	-7%	-6%

Base: UK n=2,000, France n=1,000, Germany n=1,000, Spain n=1,000, Netherlands n=500, Belgium n=500

“In the UK all the banks have easy to use, accessible apps which are now popular among age groups that perhaps wouldn’t have touched them a few years ago.”

Steven Lee, Director of Consumer & Shopper Engagement EMEA, LEGO Group

“In the 17 years I’ve lived in Spain I’ve banked with three different institutions; I’ve left each one because of bad customer service. In each case the approach to customers appeared to be very old fashioned, rigid and really not very forward-thinking.”

Sophie Chelmick, EVP EMEA, TDCX

“It is very difficult to contact banks in Spain. They're closing more and more branches and it's almost impossible to get in touch with them online.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

Willingness to self-serve varies by query type and by country

The past few years have seen a big push to roll out self-serve contact journeys, with the goal of deflecting demand away from assisted channels as well as to offer more choice to the customer.

“There are many channels available now, many ways for consumers to interact with brands. It's a big challenge for the service provider to keep up.”

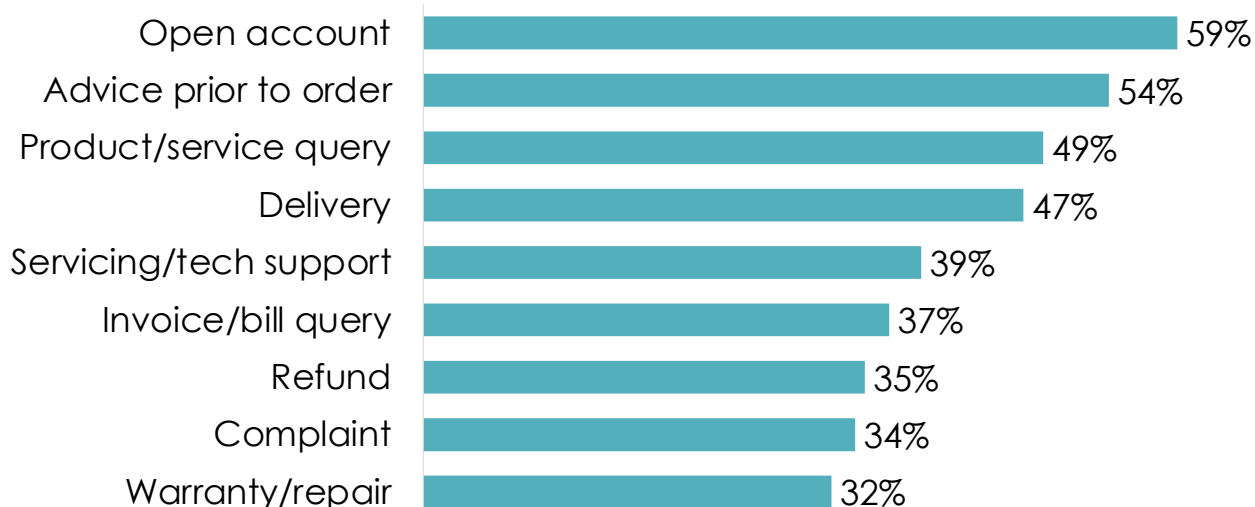
Mariana Victorino, Head of EMEA Communications, Foundever

As shown in Figure 10, consumer acceptance of self-serve across the six markets covered in this research depends on the type of interaction, with greater acceptance reserved for simpler interactions such as opening an account, but less acceptance when it comes to more complex, emotive or urgent ones

such as repair and complaint.

Simpler interactions with higher acceptance of self-serve tend to be pre-purchase journeys, while more complex interactions where human assistance is desirable tend to be post-purchase journeys.

Figure 10: Generally speaking, for each of the following types of queries would you prefer to be assisted, or would you be happy to serve yourself for example via the provider's website?



Base: n=6,000

“What this clearly shows is that you’re willing to self-serve when you have a query, but if you have a problem you’ll want to talk with someone. There’s a very, very clear distinction here.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

The distinction between ‘query’ versus ‘problem’ is an important one for organisations to be aware of when considering channel strategy. For more

complex post-purchase queries, consumers may be willing to begin their journey via self-serve but it is important to also offer an easy option to switch to a human advisor.

“Sometimes you can’t find a contact number. And you go around loops. It’s great to provide digital channels for customers but this shouldn’t be detrimental to them.”

Davide de Fano, Customer Interaction Manager, Bosch Thermotechnology

“For some clients that we’re speaking with, the strategy is to field communications via more digitised channels which do tend to be more cost effective and relevant. In my personal experience – for example when trying to contact airlines, you can see that some organisations prefer not to make phone numbers highly visible preferring to field comms via chat or ticketing.”

Sophie Chelmick, EVP EMEA, TDCX

“It really pains me that organisations are taking voice away. It’s not just the older demographic but people with disabilities that perhaps need to talk with people on the phone. I was at a best practice event last year where someone was really happy about the fact that they’ve saved millions of pounds by closing down the phone channel. But what are the unintended consequences of this? I would sometimes question that digital channels are always the cheaper ones, because they often require multiple contacts in order to get to a resolution whereby with a voice call you can get to the heart of it really quickly.”

Steven Lee, Director of Consumer & Shopper Engagement EMEA, LEGO Group







“If a customer contacts us by email and we cannot resolve their query quickly via that contact medium, we will try to call the customer back to resolve their query over the telephone. We’ve seen that proactively reaching out in this way increases customer satisfaction.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

Notable differences in self-serve acceptance are observed by country. As Figure 11 illustrates, the French and Germans are on the

whole the most willing to self-serve, and the Spanish the least willing.

Figure 11: Generally speaking, for each of the following types of queries would you prefer to be assisted, or would you be happy to serve yourself for example via the provider's website? [Percentages shown are 'happy to self serve'].

						
Open account	63%	71%	54%	42%	64%	60%
Advice prior to order	56%	68%	44%	37%	65%	60%
Product/service query	44%	62%	55%	36%	50%	51%
Delivery	44%	61%	58%	32%	43%	47%
Servicing/tech support	39%	55%	40%	25%	32%	39%
Invoice/bill query	30%	54%	48%	20%	33%	42%
Refund	31%	46%	45%	18%	34%	40%
Complaint	30%	45%	52%	14%	25%	39%
Warranty/repair	32%	44%	37%	15%	31%	31%

Base: UK n=2,000, France n=1,000, Germany n=1,000, Spain n=1,000, Netherlands n=500, Belgium n=500

Cultural differences in interaction preferences and behaviours can impact operational benchmarks, with some contact centres

implementing different AHT (Average Handle Time) norms for different nationalities.

“Spanish and Italian AHTs tended to trend higher than French, German, Dutch and English. At least 20% of that increase was allocated to the importance that was placed on rapport building and genuine interest in 'how are you doing, how's the family, hat did you do this weekend?'. Personal interactions that ultimately benefitted everybody and resulted in better NPS, CSAT or increased sales - and on this basis, we set different AHT benchmarks for each market.”

Sophie Chelmick, EVP EMEA, TDCX

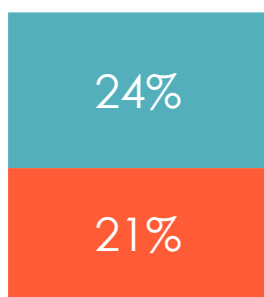
Consumers distinguish between contact experience and customer service

When asked specifically to rate the 'helpfulness of contact centre advisors', consumers tend to be more positive compared to their ratings of customer service

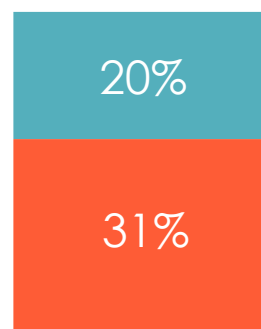
overall. Figure 12 shows the proportion of positive ratings given to contact centre advisors outweighs negative ratings.

Figure 12: Thinking specifically about customer-service advisors who assist on phone, chat and email, would you say that they have become more helpful, less helpful or about the same in the last 12 months, generally speaking? VS Would you say that customer service overall today has improved, worsened or stayed the same since compared with 12 months ago?

Contact centre advisors



Customer service overall



■ Positive ratings ■ Negative ratings

Base: n=6,000

Contact centre leaders interviewed for this research noted that internal customer satisfaction surveys also show a similar pattern, with better ratings for contact experiences than overall brand experience ratings.

This suggests that consumers do appreciate that unsatisfactory experiences or unresolved issues can be a result of root causes outside of the contact centre's control.

"I've noticed with our NPS surveys that the scores for agent capability are always the highest across the board across all countries. I think customers can recognise the human is doing their best and the problem is the process, or maybe there's something else happening."

Eugen Majeri, Digital Service Manager, Panasonic Europe

"The top driver of contact in consumer electronics is repair. There has been a knock-on effect between Covid and the war in terms of parts supply and transit. It takes longer to get something fixed."

Eugen Majeri, Digital Service Manager, Panasonic Europe

The front line bears the brunt of consumer frustration

Notwithstanding the consumer's ability to differentiate the contact experience from root causes of issues, it is inevitable that frustrations will be taken out on the front line. Figure 13 reveals just how widespread these frustrations

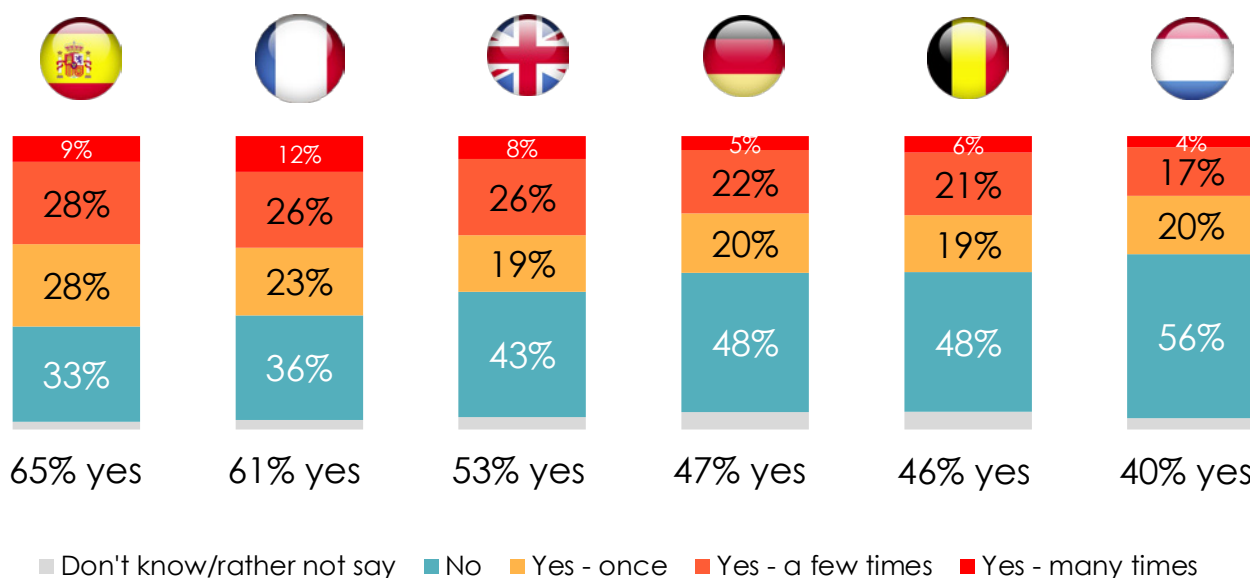
are, with consumers in Spain and France most likely to report having been angry or upset when interacting with a contact centre advisor in the past 12 months (65% and 61% respectively).

Across Belgium, France, Germany, the Netherlands, Spain and the UK more than half (52%) of all adults report having become angry or upset when interacting with a contact centre advisor in the previous 12 months.

Of the six nations included in this research the Dutch are least likely to vent to an advisor, albeit the proportion of Dutch who have done

so in the past year is still high in absolute terms (40%).

Figure 13: Have you ever become angry or upset when interacting with a contact centre advisor in the past 12 months?
[Note: numbers shown may not add up exactly due to rounding].



Base: UK n=2,000, France n=1,000, Germany n=1,000, Spain n=1,000, Netherlands n=500, Belgium n=500

“Even though I’ve worked in this industry for a long time, and I deeply care about the people who have to talk to customers day-in day-out, I’ve still found myself at the other end where I’ve been at the end of my tether usually down to poor processes.”

Steven Lee, Director of Consumer & Shopper Engagement EMEA, LEGO Group

“For me these results reflect the levels of investment in the customer journey in each country. In countries where there is more frustration when reaching contact centres, it is most likely due to a lack of investment in the overall customer journey.”

Oliver Dorta-Fernández, EMEA Customer Services Senior Manager, Canon Europe

There can be no doubt that the challenges faced by people across Europe in 2023 are translating to increasing expectations, high levels of emotion in customer contact and a desire for assistance to complete journeys.

Moreover it has never been more important to ensure frontline colleagues in contact centres have the tools they need to be effective, allow them to take breaks when needed, and help them build resilience.

“We introduced a new code last year for staff to use to take time out when they need to. They can use this code and it doesn’t affect their stats. And when we see they’re on that code, we can offer support and help.”

Naomi Smith, Contact Centre Manager, Bosch Thermotechnology

7 discoveries

from the Voice of the European Contact Centre Consumer 2023

- 1** Across Europe more people say customer service is getting worse than say customer service is getting better.
- 2** Customer service expectations are closely linked to financial pressures due to rising cost of living. People who are feeling the pinch are more likely to think customer service standards are declining, as their needs are especially urgent.
- 3** Younger customers (in their twenties and thirties) are considerably more positive about the direction of travel in customer service, as they tend to be earlier adopters of digital and self-serve channels.
- 4** Big variations in customer service ratings are observed between industries and between countries, but a consistent theme in every country is the gap between expectations and delivery in utilities and government, two sectors which are the most affected by global economic and social upheavals.
- 5** Consumers are relatively comfortable with self-serving pre-purchase queries which tend to be simpler, but are more likely to want assistance to resolve post-purchase reasons for contact which tend to be more complex.
- 6** Consumers are more positive about contact experiences than they are about customer service overall.
- 7** A substantial number of consumers are prone to becoming angry or upset when interacting with a human advisor, particularly in Spain and France. In times of widespread financial difficulty and general uncertainty, it has never been more important to address root causes and protect the contact centre front line.

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