

Voice of the Contact Centre Consumer 2022



Supporting Partner

odigo

A CCMA Research Initiative



One year later

Each year, the CCMA conducts a comprehensive study into the experiences of those that interact with contact centres: the Voice of the Contact Centre Consumer. The research series uncovers how customer contact needs, expectations and behaviours are evolving.

Supported by Odigo, CCMA's Voice of the Contact Centre Consumer is produced for contact centre leaders in the UK and provides insights to inform a wide range of contact centre strategies.

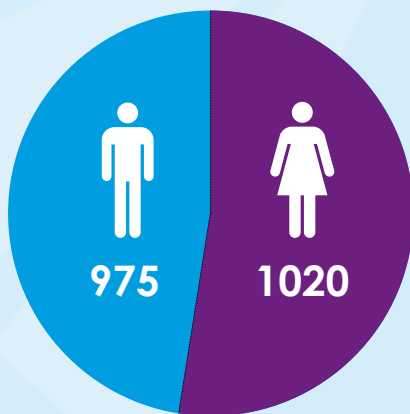
Research methodology

The 2022 *Voice of the Contact Centre Consumer* research comprised two distinct phases.

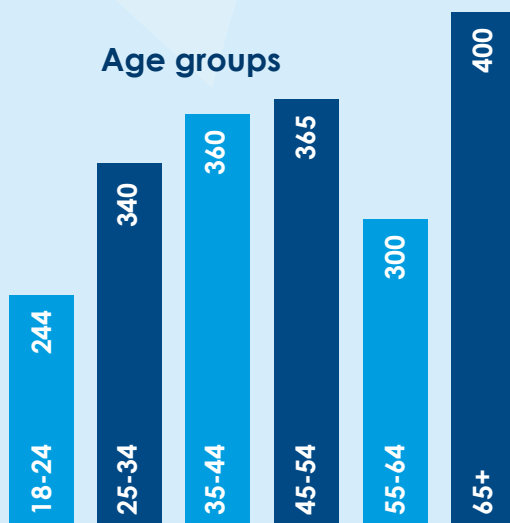
In the first phase n=2,004 online interviews were conducted with UK consumers from

9-15 March 2022. Quotas were set by age, gender and region to ensure a nationally representative sample. The composition of the sample was as follows:

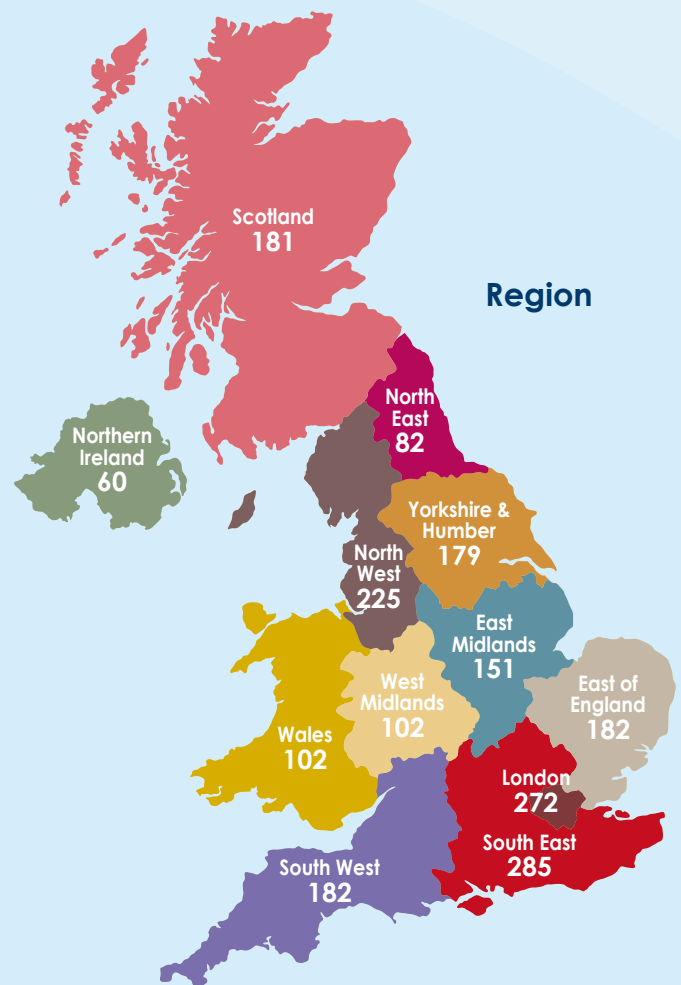
Gender



Age groups



Region



In the second phase, we presented findings from the quantitative consumer research to a group of contact centre leaders to provide commentary and context.

With thanks to

We invited 10 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. The CCMA and Odigo extend sincere thanks to these individuals for their generous participation in the study.

Paul Bentley, Development Centre Manager, Loop

Carl Bromley, Head of Customer Experience, Ageas Group

Sarah Bull, Head of Consumer, Deckers Brands

Donna Czyzewski, Head of Customer Contact, IAG

Andy Davies, Head of Service & Delivery, Virgin Wines

Viv Kelly, Head of Customer Service, Shell Energy

Anita Renyard, Senior Manager, TSB

Harriet Treadwell, Head of Customer Love, Butternut Box

Alex Williams, Head of Customer Contact, UK Power Network

Val Wonnacott, Business Improvement Manager, The AA

Industry Expert

Nerys Corfield, Contact Centre Consultant, Injection Consulting

Foreword

Welcome to the 2022 edition of CCMA's Voice of the Contact Centre Consumer research, the definitive source of consumer understanding for our industry.

As an annual study Voice of the Contact Centre Consumer tracks how our customers' needs, preference and behaviours change over time.

This year we are seeing clear evidence that consumers are becoming increasingly savvy. Acceptance is rising for self-serving the likes of delivery updates but is decreasing when it comes to sensitive interactions such as complaints. As people gain experience with different channels, they become more choosy about when to self-serve, versus picking up the phone or starting a live chat.

We are not seeing an improvement in overall customer service ratings since last year. Several months post lockdown, with operations returning to a semblance of 'normality' it might not be unreasonable to hope that this might be reflected

in consumer sentiment. The fact that ratings are broadly unchanged since 12 months ago (when operational conditions were extremely challenging) suggests that customer expectations evolve as quickly as our ability to meet them. We can never take our customers for granted. Furthermore, we must be especially cognisant that mature consumers tell us that service standards are declining for them.

On a more upbeat note I'm delighted to see that two out of every three (64%) members of the public rate a customer service career positively when it comes to 'doing an important job for the community'. More than ever, we provide a vital service for the economy and for society, and it's rewarding to see this widely recognised.



Leigh Hopwood,
CEO, CCMA

Odigo is delighted to support, for a second year, the CCMA's valuable research into contact centre consumer opinion. This year is especially interesting because as the dust begins to settle after such a rapid period of change we get insight into how customers really feel about the services now on offer.

There is a lot to consider, what people accepted or at worst tolerated at the height of the pandemic may not be the same as their idea of great service. Within the industry we can see the benefits of these changes but do customers see things the same way? Are we doing a good enough job intelligently applying technology so the customer facing experience is what it should be?

The CCMA has provided insightful breakdowns of the data which help to better visualise the subtleties of opinion. This detailed information can really steer contact centre services so they match expectations and deliver the experiences that customers demand. Unsurprisingly this reflects back onto the recurrent theme of personalisation

and not simply supplying a one size fits all service. Complexity, urgency and preference dictate that modern services need to be made up of consistent messaging and interconnected experiences. This ensures customers can make service choices not compromises.

Odigo's customer experience mission revolves around the intelligent application of our innovative Contact Centre as a Service (CCaaS) solution. We are passionate that technology can bring benefits to customers, agents and businesses. As a result these insights are equally as valuable to us as to the contact centres we work with. We all have opinions on best practice and what's right in our own sector but ultimately what matters is customer opinion. So let's sit up and take note so we apply technology in the right way to enhance customer experiences.



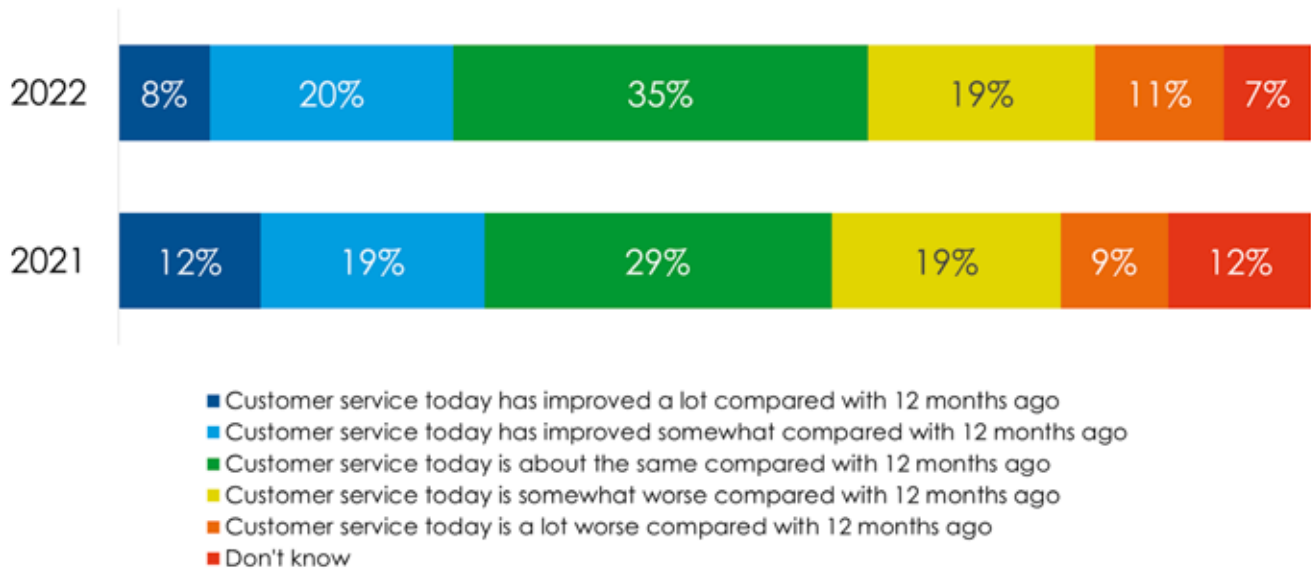
Neil Titcomb,
Managing Director UKI
at Odigo

Is customer service getting better or worse over time?

Opinions on the current state of customer service are divided into three camps of approximately equal numbers: those who say customer service is getting better, others who believe customer service is getting worse and finally people who think the quality of customer service is about the same as it was 12 months ago.

As shown in Figure 1, this is a similar pattern to that observed in 2021, the only difference being that there are fewer 'don't knows' in 2022 and more people who report 'the same'.

Figure 1: Would you say that customer service overall today has improved, worsened or stayed the same since compared with 12 months ago?*



Base: 2,004

* In 2021 the question was 'Would you say that customer service overall today has improved, worsened or stayed the same since before the pandemic?'

"Customers across retail can become frustrated when they still hear providers say 'we've got a COVID problem, and we've got a staff problem.' Also, some customers are going through financial difficulties which could only contribute to their frustration."

Andy Davies, Head of Service & Delivery, Virgin Wines

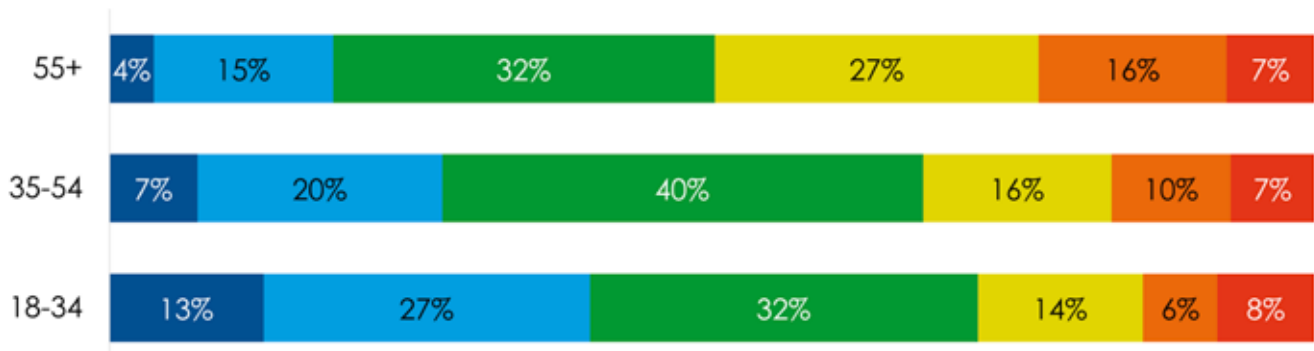
"Our people have been having an increasingly difficult time with frustrated customers. I wonder how the psyche of the nation has changed as a result of the pandemic."

Viv Kelly, Head of Customer Service, Shell Energy

As illustrated in Figure 2, opinions of customer service vary quite markedly by age group. More than twice the proportion of those aged 18-34 believe that customer service is improving (40%) compared with those aged 55+ (19%). Conversely more than twice the

proportion of people aged 55+ say that customer service quality has declined in the past 12 months (42%), compared with those aged 18-34 who say it has stayed the same (20%).

Figure 2: Would you say that customer service overall today has improved, worsened or stayed the same since compared with 12 months ago? [By age group]

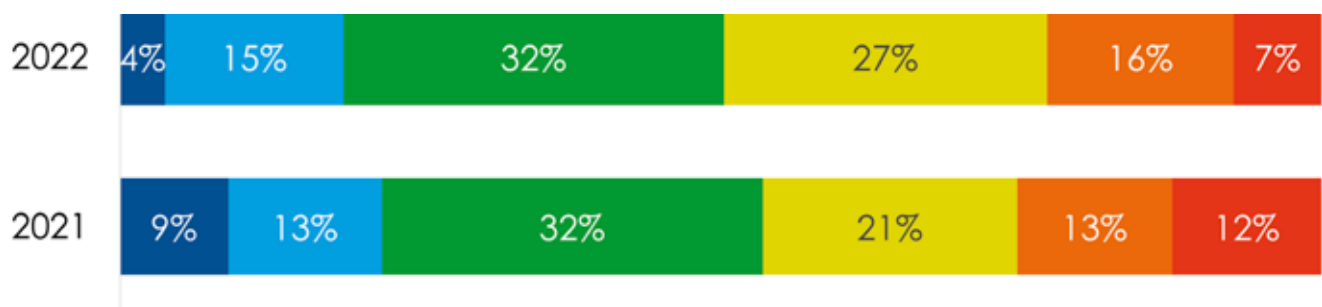


Base: 18-34 n=584, 35-49 n=720, 55+ n=700

For mature customers the outlook for customer service is only getting bleaker. The proportion of people aged 55+ who believe customer service has declined in the past 12 months has jumped from 34% in 2021 to 43% in 2022.

43% aged 55+ say customer service has declined in the past year, up from 34% in 2021. On the other hand, the proportion of 18-34s who say customer service has declined has reduced from 24% in 2021 to 20% in 2022.

Figure 3: Would you say that customer service overall today has improved, worsened or stayed the same since compared with 12 months ago?* [Aged 55+]



Base: 55+ n=700

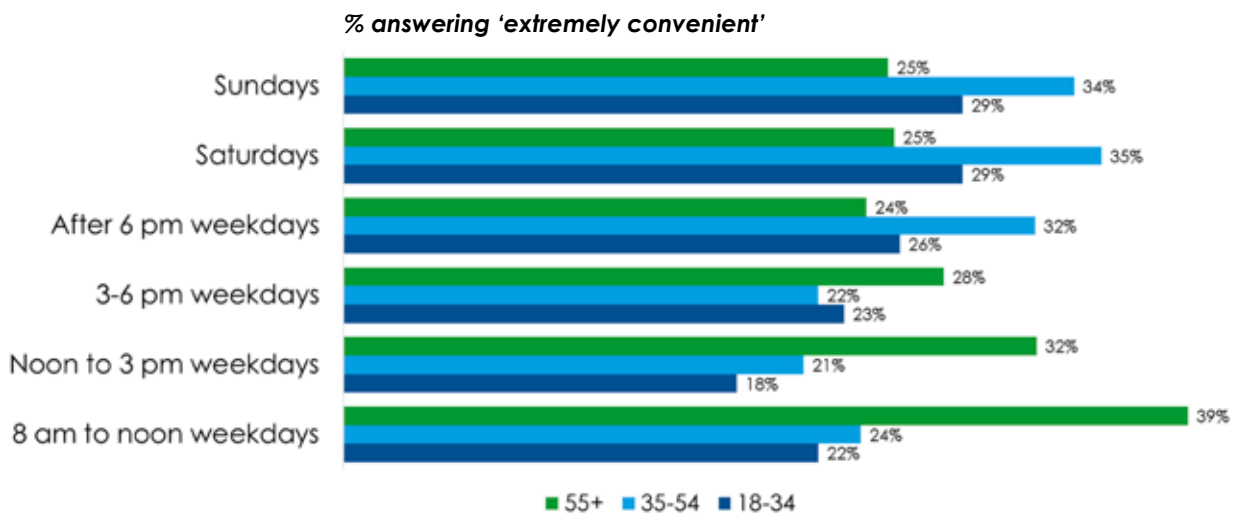
* In 2021 the question was 'Would you say that customer service overall today has improved, worsened or stayed the same since before the pandemic?'

When is it most convenient for customers to contact organisations?

Another topic on which people of different ages exhibit somewhat differing views is regarding the best time of the day and week to contact organisations. People aged 55+ tend to exhibit a stronger preference for weekdays and earlier in the day, while 35-54

year-olds are more likely to pick weekday evenings or weekends. This difference may be attributed to 35-54s being less available during office hours due to work and family commitments.

Figure 4: For each time slot, please select an answer from 1 to 5, where 5 equals 'extremely convenient for me to contact customer service' and 1 equals 'not at all convenient for me to contact customer service'.



Base: 18-34 n=584, 35-49 n=720, 55+ n=700

"You might not want to have a call in the office due to privacy. But as more people are working from home these days, we're finding when we do outbound contact that we're getting more people answering throughout the day, whereas it used to be that afternoon and evening was a much better time to call." Anita Renyard, Senior Manager, TSB

"Another thing is the shift to digital channels. On the phone, you're pretty much a captive audience, while webchat may push people towards contact on a weekend, out of hours and during the day as well." Paul Bentley, Development Centre Manager, Loop

Is self-serve continuing to become normalised?

"You can self-serve, see what the problem was, be offered a credit or a refund or a replacement. And you don't ever have to actually get in touch with someone, which is what millennials and Gen Z expect and want." Harriet Treadwell, Head of Customer Love, Butternut Box

One of the most important findings in 2021's Voice of the Contact Centre study was the increase in acceptance of self-serve among consumers. 12 months later, has self-serve continued to gain traction?

The answer is 'yes and no'. As Figure 5

illustrates, for some simpler queries there has been a further jump in self-serve acceptance from 2021 to 2022. A particularly notable increase is observed for delivery queries, of which acceptance to self-serve has grown from 46% in 2021 to 51% in 2022.

51% are happy to self-serve delivery queries, up from 46% in 2021.

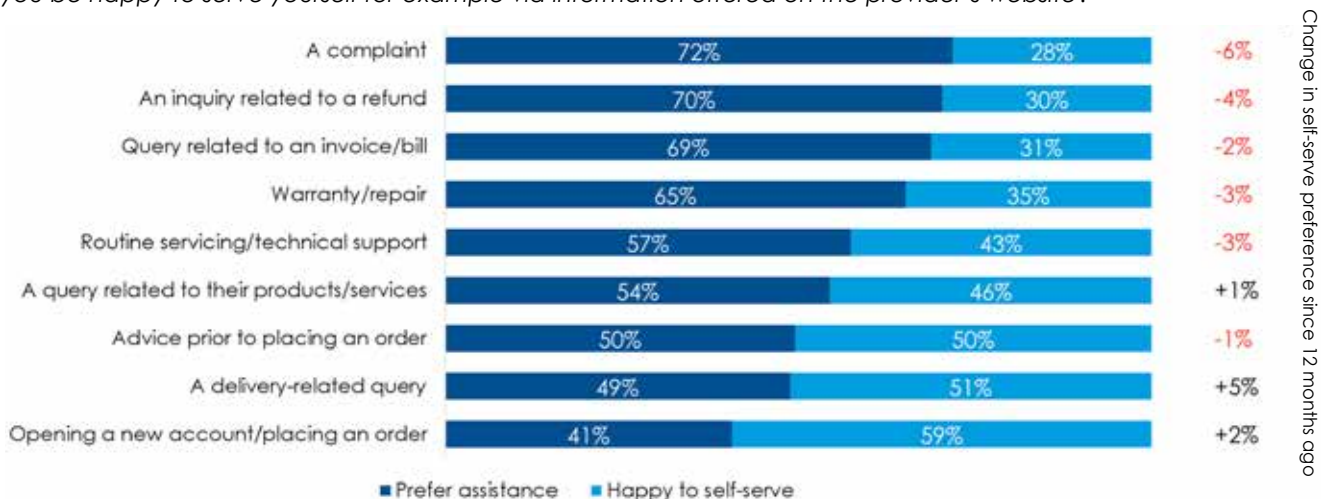
However, for other types of interactions the level of acceptance for self-serve has actually diminished. The proportion who would be happy to self-serve a complaint has fallen from 34% in 2021 to 28% in 2022. 34% would have been willing to self-serve a refund

query in 2021, but this has dropped to 30% in 2022. Other types of interactions, such as those related to an invoice, warranty and technical support have also posted declines in willingness to self-serve.

The proportion of consumers happy to self-serve a complaint has dropped to 28% in 2022, down from 34% in 2021.

These findings suggest that with another 12 months' experience using various contact channels, consumers are increasingly differentiating between less complex queries where self-serve is easy and convenient, versus more complex ones where human assistance can be valuable.

Figure 5: 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 information offered on the provider's website?



Base: n=2,004

"I wonder to what extent trust comes into play. Perhaps there isn't as much trust that you can get resolution via online services, versus person to person." Viv Kelly, Head of Customer Service, Shell Energy

"Trust is a big factor when it comes to things like warranty repair. You'd prefer to talk to someone to reduce the chances that the provider might try to wiggle out of honouring the warranty."

Paul Bentley, Development Centre Manager, Loop

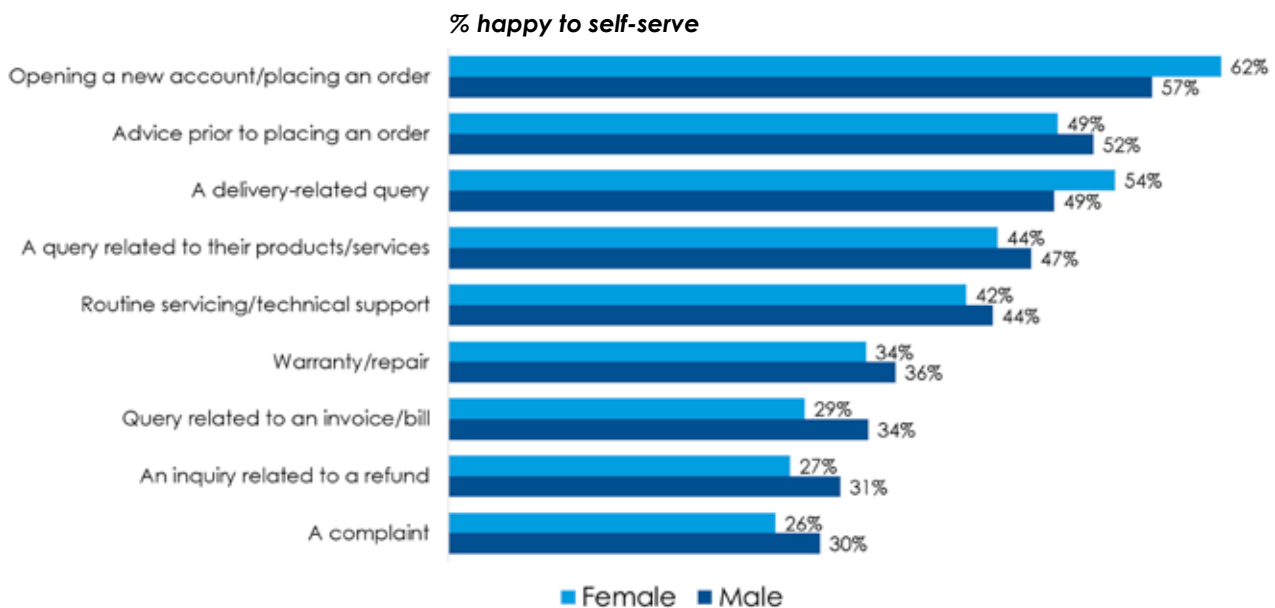
"Some of the self-serve solutions that were offered during the pandemic weren't great and sometimes you feel like 'no, I want to almost see the whites of the eyes of the people and get a commitment.'" Anita Renyard, Senior Manager, TSB

"The moral of the story is, if you get your online channels wrong, don't expect customers to readily go back to them." Viv Kelly, Head of Customer Service, Shell Energy

Some differences are noted between men and women when it comes to willingness to self-serve. Women are even more comfortable than men when it comes to self-serving an account-opening journey or checking for an update on a delivery. On the other hand, for the complex journeys (warranty, invoice,

refund complaint) women exhibit a lower level of self-serve acceptance. Women's stronger preference to speak with someone for these types of queries suggests a higher level of comfort with conflict and emotive conversation, versus a stronger preference among men to avoid difficult conversations.

Figure 6: 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 information offered on the provider's website?



Base: female n=1,070, male n=975

Which channels do consumers prefer using for different types of queries?

Five contact channels make up approximately 80 per cent of consumers' first-choice preference across all contact reasons.

As Figure 7 shows, telephone continues to be many people's preference for the most sensitive and challenging types of support needs: reporting fraud (48%), warranty/repair queries (30%) and refunds (28%).

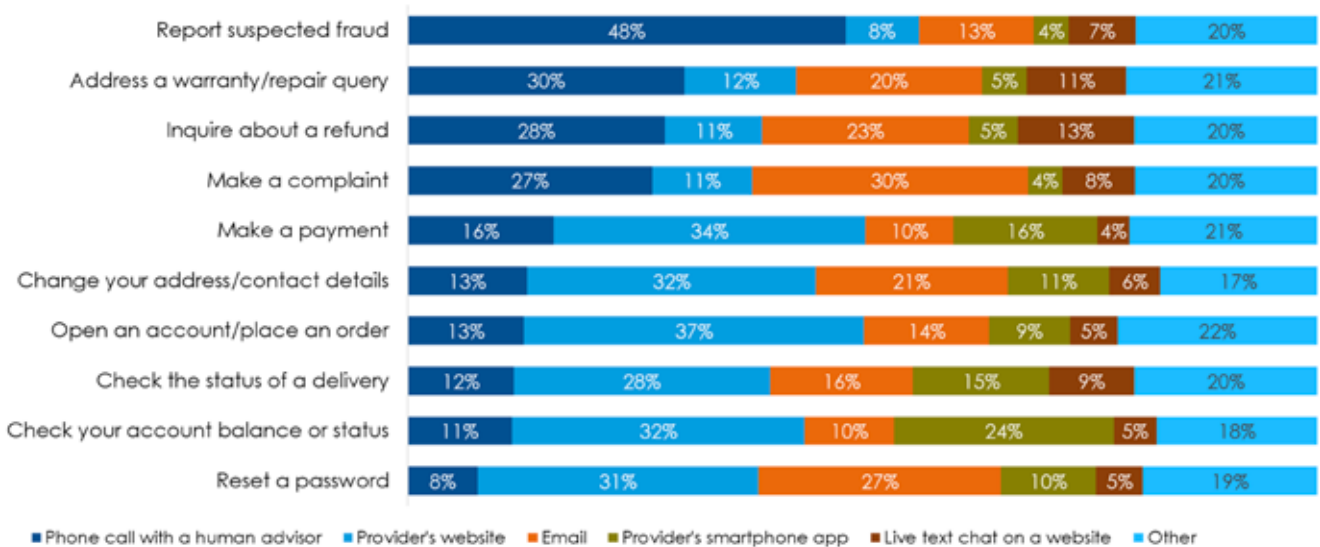
Despite the declining popularity of email among some providers, email continues to be popular among consumers. Email has the highest share of consumer preference for

making complaints (30%) and for resetting passwords (27%).

For all other types of queries, a provider's website has the highest share of consumer preference.

Contact reasons for which a mobile app is especially popular include checking account balance (24%), making payments (16%) and delivery updates (15%). Preference for live chat is strongest for refund inquiries (13%) and warranty/repair queries (11%).

Figure 7: If you were to contact a company or organisation in order to [query] and were given a choice of contact methods, which would be the method you would typically choose?



Base: n=2,004

Channels included in 'other': video call, SMS, chatbot, social network, private messaging app, post, physical store/office'

"When it comes to the more difficult queries, you need to make sure you have people available. On the back of customer feedback, we have introduced voice bots and chatbots to deal with the simpler queries. If you don't get this right, customers will call you which contradicts the process and can cause frustration. It's important to get the balance right and give customers what they want."

Carl Bromley, Head of Customer Experience, Ageas Group

“With the cost of living increasing at such a rate, there is more financial urgency. I think we will see more heightened pressure. For example, a real need to sort a refund.” Viv Kelly, Head of Customer Service, Shell Energy

“I’m questioning the popularity of email. We’ve found email to be one of the worst channels for contact resolution because it takes at least three exchanges before you actually resolve something.” Donna Czyzewski, Head of Customer Contact, IAG

“It depends on the business and how frequently the customer interacts with you. Some suppliers I contact once a year, others I may need to contact more frequently. So, my banking app will always be on my phone. But somebody who I just change things with every couple of years, I’ll not keep their app on my phone.” Val Wonnacott, Business Improvement Manager, The AA

“We found webchat was inefficient and struggled to get the best customer journey around some of the more complex customer queries. It also drove lots of contacts that we wouldn’t have normally received. Queries such as opening times that people weren’t likely to call for because of queues to get through on the phone became easy to do, and that drove lots of contacts that weren’t necessarily adding value to the customer.” Paul Bentley, Development Centre Manager, Loop

The impact of organisational and brand values on customer retention

With corporate ESG (environment, social and governance) increasingly in the headlines, in 2022's Voice of the Contact Centre Consumer

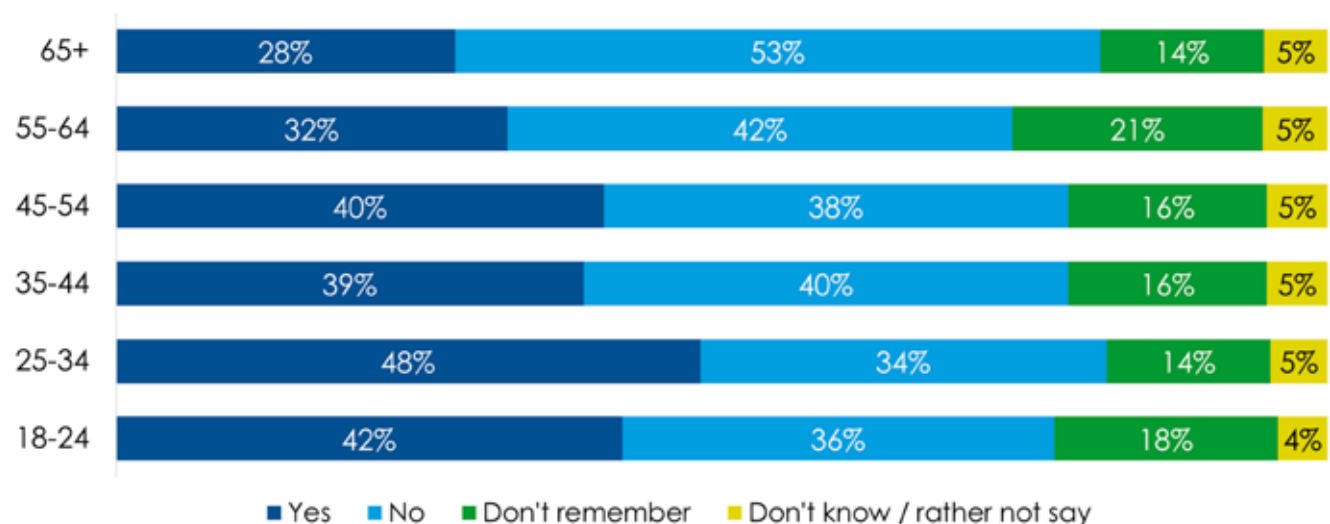
research we explored the relationship between organisational values and (claimed) consumer behaviour.

38% of people say they have stopped buying from an organisation whose values they disagreed with.

The connection between good corporate citizenship and consumer perception is clear. Almost four out of ten (38%) people and as

many as 48% of those aged 25-34 say they have stopped business with an organisation whose values they disagreed with.

Figure 8: Have you ever stopped buying from an organisation because you didn't agree with its values?



Base: 18-24 n=244, 25-34 n=340, 35-44 n=360, 45-54 n=360, 55-64 n=300, 65+ 400

"Our customers are requesting a lot more information. What's the provenance of the meat that we use? Are we B Corp certified? How do we support women in the workplace? The younger group are leading the way." Harriet Treadwell, Head of Customer Love, Butternut Box

"It's a true test of someone's principles if there's a product that does exactly the same and it's a lot cheaper. Would you stand by your principles, or would you buy the product? Would you say the right things, but still buy the product? I wonder whether some of the older age groups may be a bit more willing to read between the lines." Paul Bentley, Development Centre Manager, Loop

"We've been looking at how to connect sustainability with the contact centre operation. We're pretty much 100% homeworking now. So perhaps from a sustainability perspective we're doing our bit by not having people travelling to an office every single day. It's about trying to find ways within our world to make a difference." Donna Czyzewski, Head of Customer Contact, IAG

Which areas of customer service do consumers say organisations do best?

When it comes to customer service, what do organisations do well according to consumers, and where is there room for improvement? And how different are perceptions of customer service by industry sectors? Answers can be found in Figure 9, which reveals several findings:

- Across all sectors higher scores tend to be observed for 'helpful customer service staff' and 'customer service is friendly'. These represent the relative strengths of customer-facing teams.
- Lower scores tend to be observed for 'a good place to work', 'gives me personal service that makes me feel recognised' and 'contribute to the wider community'. These are areas that would benefit from perceptions being shifted.
- Banks receive the highest ratings in all areas except for 'contribute to the wider community', for which retail is the most highly rated. Banks and retailers receive equal highest ratings for 'customer service is friendly'.
- Government organisations receive the lowest ratings in all areas, with the exception of 'contribute to the wider community', 'good place to work' and 'can be trusted to do the right thing most of the time'.

Figure 9: Please select which of the following statements apply, generally speaking to [SECTOR]. Please select all that apply.

	Banks	Utilities	Insurance	Government	Retail	Telecom
Have the customer's best interests at heart	26%	19%	19%	15%	24%	21%
Contribute to the wider community	21%	18%	13%	20%	22%	15%
Make it easy for me to contact them when I need to	35%	29%	30%	19%	30%	33%
Helpful customer service staff	46%	34%	38%	23%	45%	40%
Try hard to resolve your queries in a timely manner	33%	28%	28%	21%	32%	32%
Offer the right contact channels to suit your preferences	26%	20%	23%	18%	22%	26%
Give me personal service that makes me feel recognised	23%	14%	17%	11%	17%	18%
Customer service is friendly	45%	33%	38%	20%	45%	40%
A good place to work	20%	12%	13%	16%	19%	14%
Can be trusted to do the right thing most of the time	36%	22%	25%	23%	28%	24%

Base: n=2,004

"Banks spend a lot on advertising that tells us they're here to help. I think that's influencing perceptions more than the actual customer experience. The water industry doesn't tend to advertise in the same way." Paul Bentley, Development Centre Manager, Loop

How do consumers perceive careers in customer service?

With recruitment, attrition and retention top of the agenda for many contact centres, it's more important than ever that careers in the contact centre are seen positively among the general public.

The good news, as shown in Figure 10, is that across multiple dimensions positive ratings outweigh negative ones without exception.

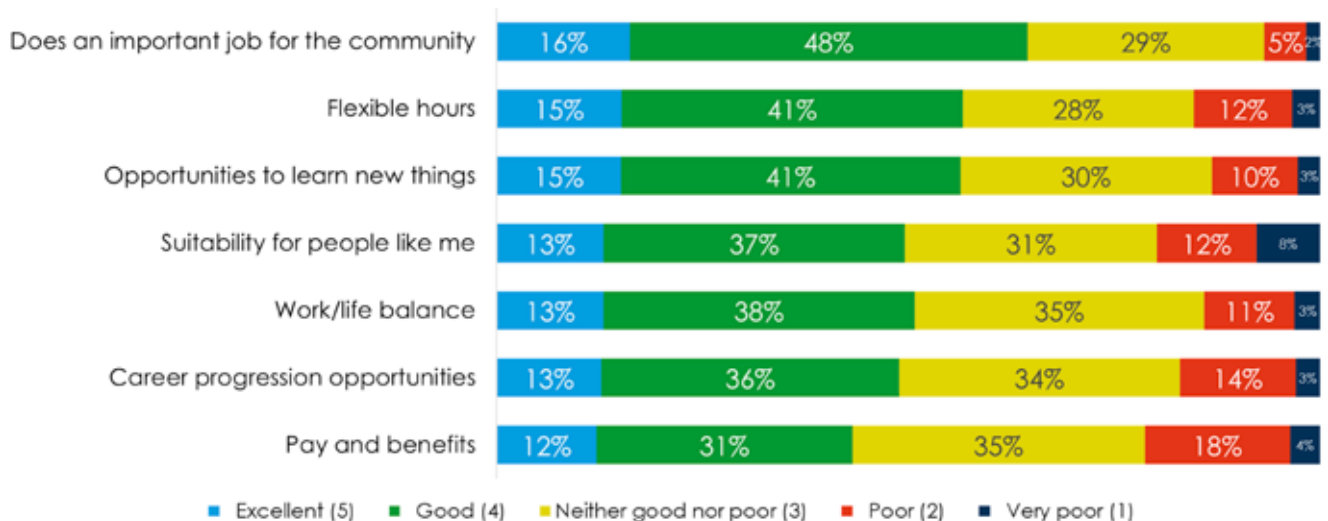
The strongest ratings are observed for 'does an important job for the community' - 64% of survey participants rating a customer service career 'excellent' or 'good' in this regard.

The next most positive ratings are for 'flexible hours', rated excellent or good by 57%, and 'opportunities to learn new things', rated excellent or good by 56%.

Ratings are least positive for 'pay and benefits', although positive ratings still outweigh negative ratings by a factor of two (43% versus 21%).

By bolstering perceptions of pay and benefits as well as career progression opportunities, areas where positive ratings are comparatively lower, contact centres stand to gain.

Figure 10: On a scale of 1 to 5, where 5 equals 'excellent' and 1 equals 'very poor', how would you rate a career in customer service in terms of the following aspects, based on what you know?



Base: n=2,004

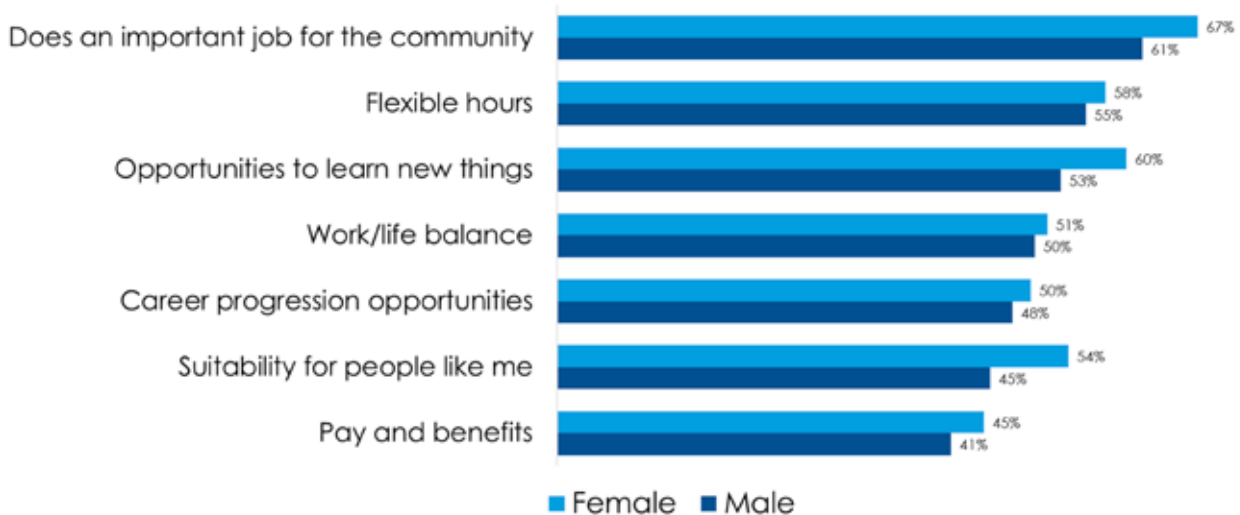
"A big area of focus for us has been flexible working. Being absolutely clear on expectations and what and whether things might change in the future. And right now it really is a candidates' market and we've had to speed up our decision-making to not lose out to other offers." Viv Kelly, Head of Customer Service, Shell Energy

"Most of our recruitment comes from word of mouth. A lot of people do have the opinion that customer service staff must be up against it, they must hate their jobs. They're surprised when a lot of people say they really enjoy it." Andy Davies, Head of Service & Delivery, Virgin Wines

"If we mess up a delivery, we'll send out a present to your dog to apologise. Customers say to us 'this must be a great place to work, because the team are allowed to do things like that and put their name to things.'" Harriet Treadwell, Head of Customer Love, Butternut Box

Women tend to be slightly more positive about careers in customer service. As Figure 11 illustrates, the gap is especially notable when it comes to 'does an important job for the community' (rated positively by 67% of women versus 61% of men), 'opportunities to learn new things' (60% of women versus 53% of men) and 'suitability for people like me' (54% of women versus 45% of men).

Figure 11: On a scale of 1 to 5, where 5 equals 'excellent' and 1 equals 'very poor', how would you rate a career in customer service in terms of the following aspects, based on what you know? [By gender].



Base: female n=1,070, male n=975

"From a young age the characteristics of being caring, kind and helpful are promoted more as qualities that girls have, and being brave, adventurous and individual tend to lean more towards boys. I think this will change in time." Harriet Treadwell, Head of Customer Love, Butternut Box

"It could be down to the positioning of the recruitment adverts. If you said you spent most of your day solving problems, then men may take a different view." Val Wonnacott, Business Improvement Manager, The AA

Discoveries from Voice of the Contact Centre

Thank you for reading this in-depth study into consumers' needs, expectations and behaviours. We hope you've found useful insight to support the development of your contact centre.

Here are a few key takeaways that summarise what we have learned:

- 1. The generational gap is widening when it comes to the outlook for customer service.** People aged 18-34 are much more likely to believe that customer service is improving than getting worse, but the reverse is true for more mature people. 43% of people aged 55+ say customer service has declined in the past year, up from 34% in 2021.
- 2. Customers have clear preferences when it comes to the most convenient time to contact organisations.** It's important to know which hours are most convenient for customers and align this with the needs of colleagues.
- 3. Consumers are learning what self-serve is good for.** Acceptance of self-serve for simpler queries such as delivery updates continues to grow, but for more complex transactions consumers are less willing to self-serve than they were 12 months ago.
- 4. Many people are willing to vote with their feet if they disagree with a provider's values.** Almost four in every ten people (38%) say they have stopped buying from an organisation whose values they disagreed with. This rises to almost half (48%) among people aged 25-34.
- 5. The general public holds mostly positive opinions about careers in contact centre customer service** with particularly strong ratings observed for 'does an important job for the community'.

“ If UK customer service had its own NPS score – this survey brings us out at a woeful 'must do much better -2 NPS'.

It is fascinating to see channel preference against contact driver. I am interested to see that email remains a channel people want to use, and that live chat comes out so low as a preferred channel for any of the scenarios.

Overall, this report is a reminder that perception (driven by industry noise) is not always the reality. To drive improved NPS for UK Plc, the focus needs to be on training and motivating advisors and getting your channel mix right for your respective customer profile and contact drivers.

Nery Corfield, Injection Consulting

”

About the CCMA

For over 25 years the CCMA (Call Centre Management Association), as the longest established contact centre industry body has been dedicated to supporting contact centre leaders. Founded on the principles of sharing best practice and networking to improve skills and knowledge, the CCMA is a thriving community that represents leaders from a huge cross-section of the industry.

Members of the CCMA community can take advantage of the many networking and learning opportunities aimed at keeping contact centre leaders up to date with changes in the industry; from technology advances, to regulation changes, to discovering new ways to improve the customer experience and more.

www.ccma.org.uk | [@CCMATalk](https://twitter.com/CCMATalk)

About Odigo

Odigo provides Contact Centre as a Service (CCaaS) solutions that facilitate communication between large organisations and individuals using a global omnichannel management platform. With its innovative approach based on empathy and technology, Odigo enables brands to connect through the crucial human element of interaction, while also taking full advantage of the potential of digital. A pioneer in the customer experience (CX) market, the company caters to the needs of more than 250 large enterprise clients in over 100 countries.

www.odigo.com/uk



**Join
us!**

Not a member?

There is no better time to join us. The industry is changing and we are giving our members more opportunities to learn, to network and to support each other.

www.ccma.org.uk/membership



0333 939 9964 | www.ccma.org.uk

@ccmatalk | info@ccma.org.uk