

Voice of the Contact Centre Consumer 2023

A CCMA Research Initiative

Supporting Partner

odigo



Documenting a period of profound change

Each year, the CCMA conducts a comprehensive study into consumer experience: 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 to provide insights to inform a wide range of contact centre strategies.

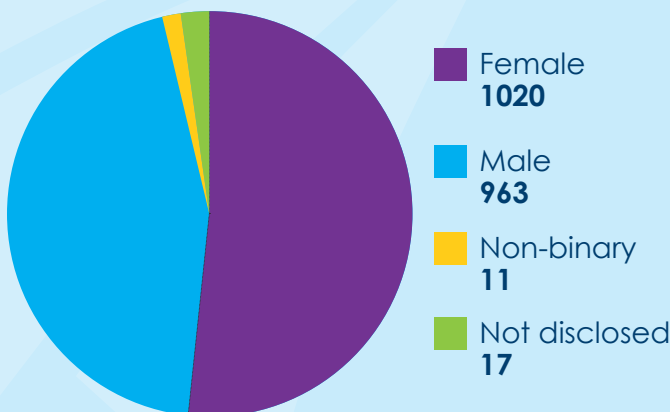
Research methodology

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

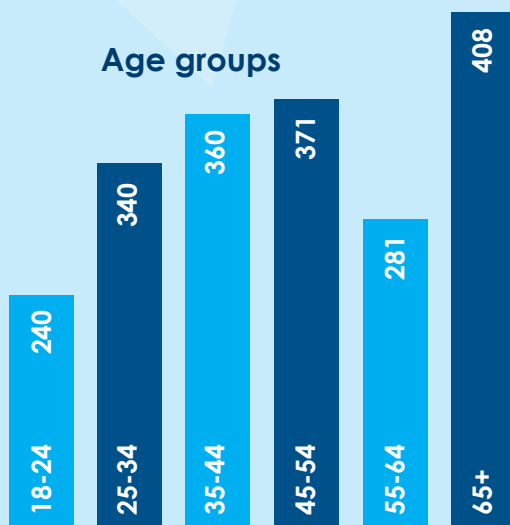
In the first phase n=2,000 online interviews were conducted with UK consumers from 3-13 March 2023. Quotas were set by age,

gender and region to ensure a nationally representative sample. The composition of the sample was as follows:

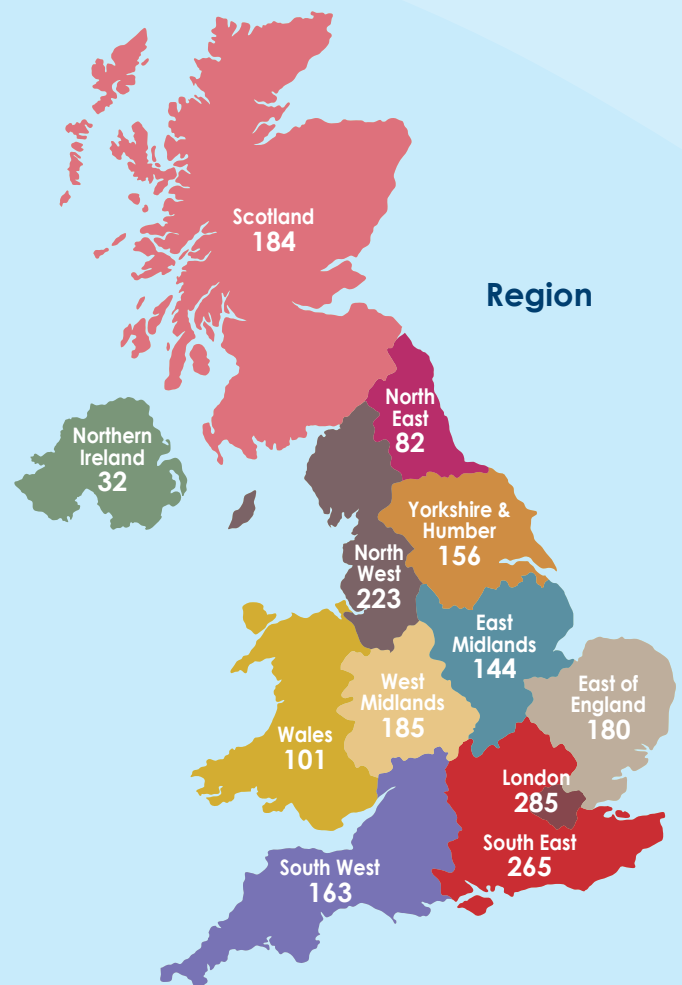
Gender



Age groups



Region



In the second phase, we shared findings from the quantitative consumer research in

discussion with contact centre leaders, 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. The CCMA and Odigo extend sincere thanks to these individuals for their generous participation in the study.

Kirk Bradley, Director of Customer Service, Bupa

Carl Bromley, Head of Customer Experience, Ageas Group

Adam Gould, Head of Customer Service, Castles & Coasts Housing Association

Sabina Onwuka, Contact Centre Manager, London Borough of Barking & Dagenham Council

Phil Quickenden, Head of Service, Camden Council

Lisa Range, Head of Telephony Sales, Tyl by NatWest

Stephen Riley, Head of Service Operations, Fibrus

Peter Sanderson, Head of Operations, Zurich

Jon Wells, Contact Centre Director, Carnival UK

Foreword

Welcome to the 2023 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 the impact of economic pressures on consumers expressed in a downward turn in perceptions of customer service. Emotions are running high: more than half of consumers report that they

have recently been angry or upset when dealing with a contact centre advisor.

During these difficult times empathy, reassurance and human assistance are more important than ever for customers. As is addressing the root causes of customer frustration and finding ways to protect and support the people on our contact centre front lines.



Leigh Hopwood,
CEO, CCMA

Odigo is proud to support the CCMA Voice of the Contact Centre Consumer Research, unveiling the profound impact of digital transformation on contact centre consumers. This research sheds light on how empowered, informed, and savvy consumers now advocate for their best interests. While confrontations may arise, we recognise the exceptional skills showcased by frontline agents, backed by industry leaders' ongoing training and support.

The research reveals a notable shift in self-service as simple queries regain complexity. Contact centres are challenged to provide support, going beyond mere service, by orchestrating complex care. Voice interactions remain a trusted channel, especially during challenging times, while self-service levels fluctuate accordingly. To deliver positive experiences, knowledge sharing, easy

escalation, accurate advice, and seamless multi-channel interactions are paramount.

At Odigo, we firmly believe in the power of research to drive change and innovation in customer experience management. Through our collaboration with the CCMA, we aim to elevate the customer experience landscape and adapt to the evolving expectations of empowered consumers.

We extend our gratitude to the CCMA for their partnership and all participants involved in this research initiative. Together, we strive to advance best practices, gain valuable insights, and provide effective solutions to enhance customer experiences.



Melissa Cowdry
Director of Field Marketing, Odigo

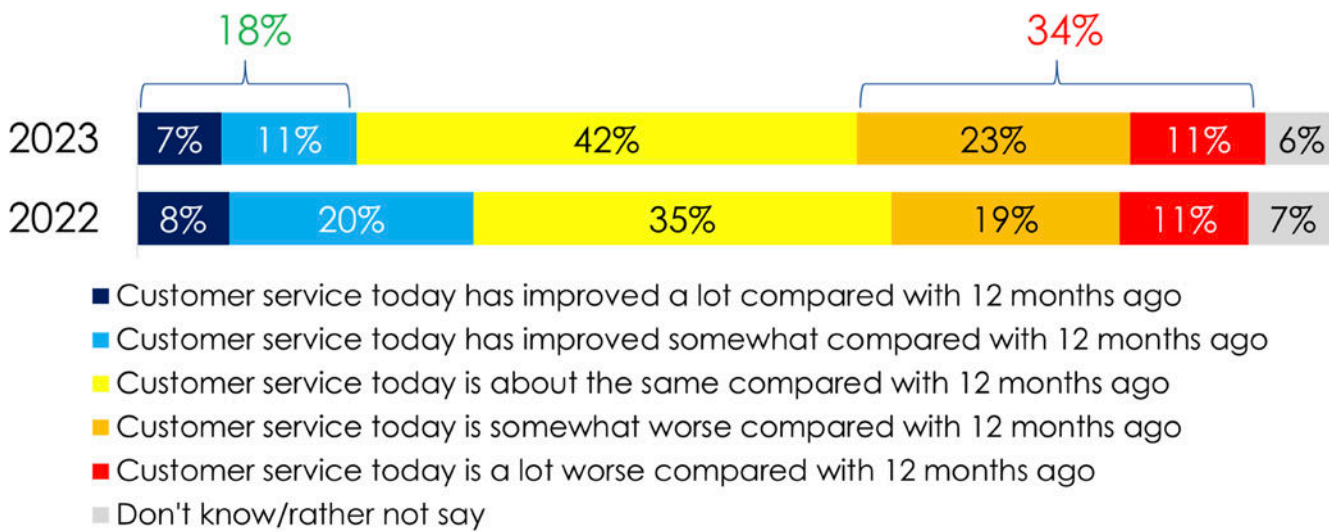
Are perceptions of customer service getting better or worse over time?

In previous years Voice of the Contact Centre Consumer research showed that the UK population could be divided into three groups of roughly equal size: people who thought

customer service was improving, those who thought customer service was worsening, and those who thought service levels had remained about the same in the prior year.

In 2023 the proportion of those who believe customer service is worsening (34%) is now almost double the proportion of those who believe service is improving (18%).

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



Base: n=2,000

Why are perceptions moving in the wrong direction? Some sectors continue to experience significant supply constraints, others are seeing dramatic demand growth and some organisations are experiencing both at the same time. For example,

healthcare continues to suffer from staffing shortages, while motor insurers' ability to fulfil claims is being severely affected by lack of spare parts, owing to ongoing issues with global supply chains.

"We're seeing an acceleration of growth due to NHS challenges and because more organisations are offering medical insurance to staff."

Kirk Bradley, Director of Customer Services, Bupa

“We’ve got some challenges that we have limited control over, such as sourcing certain parts. However, we do as much as we possibly can to ensure the impact is limited for our customers.”

Carl Bromley, Head of Customer Experience, Ageas Group

While root causes of customer problems persist which lie outside of the contact centre, anecdotal evidence points to many contact

centre operations having returned to ‘normal’ since the difficulties of the pandemic years.

Perception is shaped by expectation

Despite some contact centres seeing service quality measurably improving having worked through the challenges of recent years, the negative shift in perception points to customer

expectations having escalated in the past year much faster than organisations’ ability to meet them.

“We see a lot more instant gratification in the customer services market, and more innovation by players that are brilliant at customer service.”

Kirk Bradley, Director of Customer Services, Bupa

“There’s been a shift in expectation that you’ll be able to access services from the comfort of your own home in a choice of different channels to suit your needs and wants. It’s put pressure on organisations who haven’t kept up.”

Phil Quickenden, Head of Service, Camden Council

“In the past a customer may have been happy to allow a couple of days for their broadband to be fixed. That’s not the case anymore, as lots of people are now working from home.”

Stephen Riley, Head of Service Operations, Fibrus

Customer service is all over the news, and consumers are savvier and better-informed than ever before.

“TV and radio adverts tell people they should be complaining to the housing ombudsman about disrepair. Disrepair claims are like our new PPI. These claims take an awful lot of work to fully investigate.”

Adam Gould, Head of Customer Service, Castles & Coasts Housing Association

“The days are gone when our residents expected the advisor to have all the answers. Now they’re doing their research and they know what they’re looking for. And they’re telling the advisor ‘well, this is what’s on your website’ or ‘the government said this.’ ”

Sabina Onwuka, Contact Centre Manager, London Borough of Barking & Dagenham Council

“With social media poor experiences are made public. What used to be contained in a letter or a phone or email conversation is now out there for everyone to see. Problems are much more visible and they go viral.”

Jon Wells, Contact Centre Director, Carnival UK

Economic pressures mean more scrutiny over outgoings, pushing consumers to shop around and be as informed as possible.

“Because of the cost of living I'm having to do more financial management than ever. I'm reviewing my bills every month. I'm looking at my mortgage and my motor insurance. Whereas previously I might have just let them run over.”

Kirk Bradley, Director of Customer Services, Bupa

“There was more tolerance in the past in terms of renewal prices. Whereas nowadays pounds make a real difference for people.”

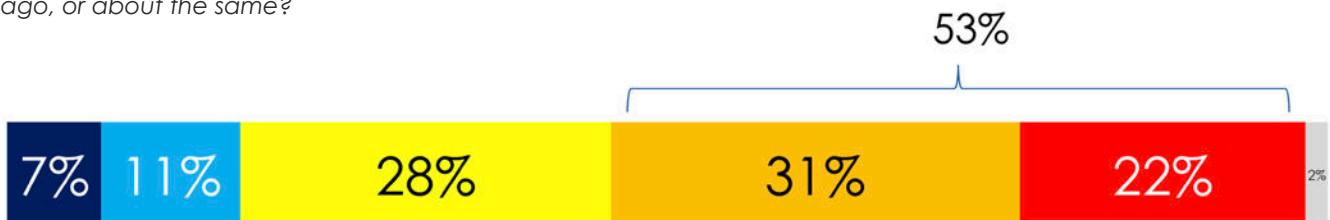
Peter Sanderson, Head of Operations, Zurich

The impact of the rising cost of living

A year of rising costs has taken a toll. More than half of people surveyed for the Voice of the Contact Centre Consumer 2023 research report that it's become harder to manage their finances.

53% of those surveyed said that it is more difficult to manage their finances today compared with a year ago.

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?



- It's much easier to manage my finances today, compared with 12 months ago
- It's somewhat easier to manage my finances today, compared with 12 months ago
- About the same compared with 12 months ago
- It's somewhat harder to manage my finances today, compared with 12 months ago
- It's much harder to manage my finances today, compared with 12 months ago
- Don't know/rather not say

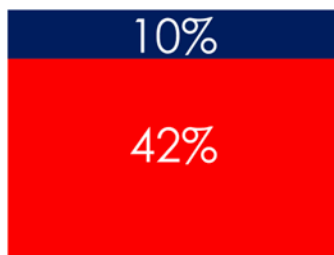
Base: n=2,000

As Figure 3 illustrates, those who are finding it harder to manage their finances also tend to be less positive about the state of

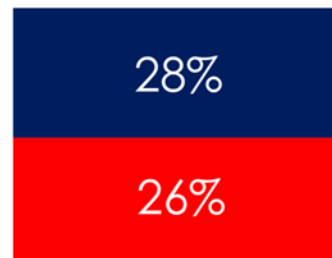
customer service. It follows that people who are struggling with rising costs have higher expectations of providers to help.

Figure 3: 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 worse ■ Customer service is getting better

Base: Harder to manage n=1,052, not harder to manage n=914

“We’re seeing people coming to knock on our door for the first time, who historically wouldn’t have come into contact with council services. People who have always got by in the past are coming to ask the council for support for the first time. And I think there’s definitely an expectation gap there.”

Phil Quickenden, Head of Service, Camden Council

Customer needs are more urgent and complex than ever

As first reported in Voice of Contact Centre Consumer 2022, ubiquitous self-serve is reshaping customer contact in unforeseen ways. Further evidence of this is apparent in 2023.

As self-serve takes care of straightforward interactions, human advisors are left to deal with the more difficult queries. Economic pressures

mean resolution is more urgent than ever for customers. Furthermore, there is a high chance that customers on the phone or chat lines are anxious or irate because they have been forced to seek assistance having previously failed to self-serve their query.

“Digital journeys can hinder the process for our people. By the time a customer gets to speak to somebody, they’re really frustrated.”

Lisa Range, Head of Telephony Sales at Tyl by NatWest

“When we introduced chat and voice bots, we were very conscious that our people might be worried we were going to take their jobs away. They told us they weren’t too bothered about that, but rather that we need to support them more as the ‘simpler’ calls were being dealt with by the bots. We’ve worked really hard on that over the past 12-18 months knowing that calls could potentially get more challenging.”

Carl Bromley, Head of Customer Experience, Ageas Group

Contact centres bear the brunt of customer frustration

A tide of customer frustration borne of unmet expectations or poor self-serve experiences is being felt directly by people working on the front line.

More than half of surveyed consumers report having become angry or upset when dealing with a contact centre advisor in the past 12 months.

It has become a priority for contact centres to adapt their training, bolstering skills hard and soft to help deal with the high

levels of complexity and emotion that now characterise many assisted interactions.

“We’re giving our people additional skills and tools to help with complexity. And more effort on identification of complaints, identifying and handling vulnerable customers, and understanding barriers to good consumer outcomes.”

Kirk Bradley, Director of Customer Services, Bupa

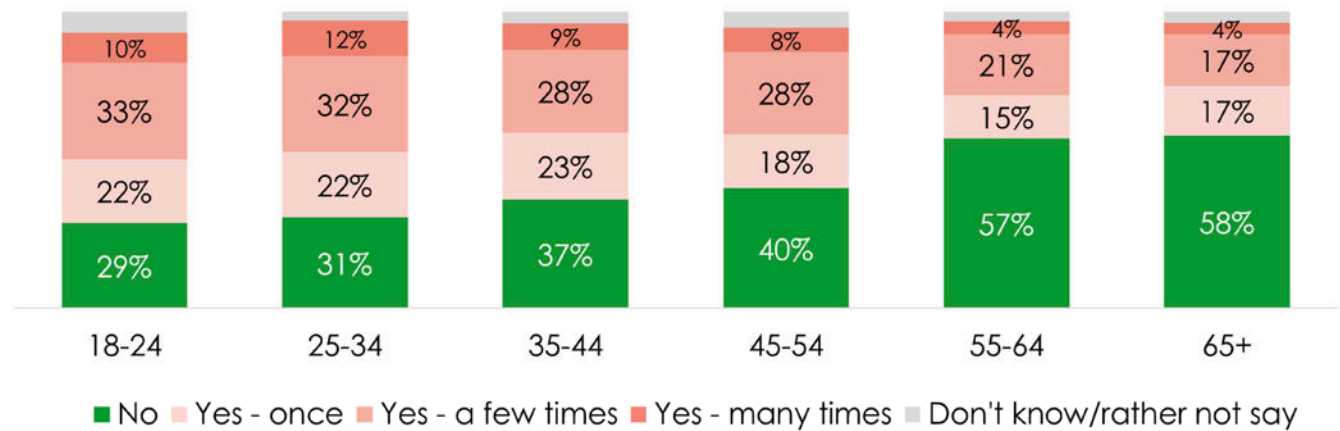
“We’ve done lots of work on customer segmentation and profiling, understanding personality drivers and training our people to be able to adapt their communication style to suit the customer’s personality. From an agent perspective, it’s the number one thing we’ve ever done. It’s not easy training, but it’s really empowering. And we’ve seen all indicators move upwards following it.”

Peter Sanderson, Head of Operations, Zurich

Figure 4 shows that younger people are more likely to report having been angry or upset during a live customer interaction. Previous editions of Voice of the Contact Centre Consumer research have shown

younger people are also more likely to have complained. This year’s findings offer further evidence that younger consumers are not reticent about speaking up to get what they want.

Figure 4: Have you ever become angry or upset when interacting with a contact centre advisor in the past 12 months?



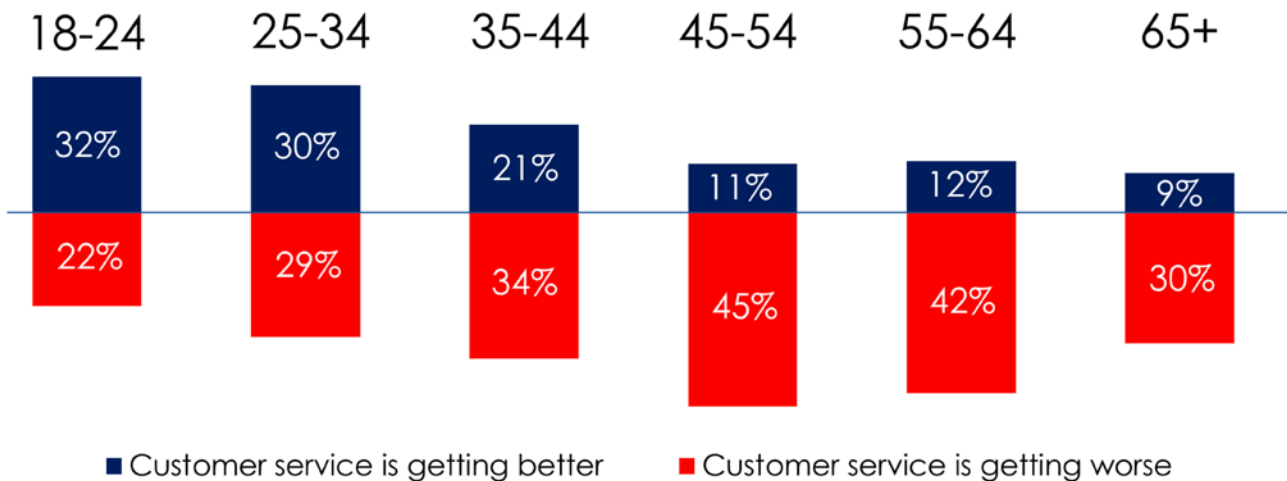
Base: 18-24 n=240, 25-34 n=340, 35-44 n=360, 45-54 n=371, 55-64 n=281, n=65+ n=408

Generational differences

Despite their greater propensity to berate contact centre advisors, younger people are

actually more likely to think customer service is improving, as Figure 5 illustrates.

Figure 5: Would you say that customer service overall today has improved, worsened or stayed the same since compared with 12 months ago?



Base: 18-24 n=240, 25-34 n=340, 35-44 n=360, 45-54 n=371, 55-64 n=281, n=65+ n=408

Why are 45-64 year-olds especially prone to think that customer service is declining in 2023?

“At this age your expectations are higher, because you’ve got more experiences to compare to.”

Lisa Range, Head of Telephony Sales at Tyl by NatWest

“I think there’s something there about how busy that cohort of people are, particularly in the current climate, more likely to be management level, people who are probably themselves dealing with increased customer expectations.”

Phil Quickenden, Head of Service, Camden Council

“Their children have come back home. There’s added pressure, more expense, less disposable income.”

Sabina Onwuka, Contact Centre Manager, London Borough of Barking & Dagenham Council

This age group may also exhibit particularly low tolerance for broken self-serve journeys and a stronger desire to connect with a human advisor in the event of issues arising.

“It’s generally easier for younger people to not want to speak to somebody directly. The more mature generations are more likely to want to have a conversation, particularly when something goes wrong.”

Carl Bromley, Head of Customer Experience, Ageas Group

Previous editions of the Voice of the Contact Centre Consumer research have discussed the need to be inclusive when designing digital experiences, and the importance of always providing an option to switch to a human. These principles hold truer than ever in 2023.

“You’ve got to recognise when people want to speak to an advisor, and don’t put them in a loop.”

Jon Wells, Contact Centre Director, Carnival UK

“Older people don’t find it difficult to deal with technology, provided that the technology is straightforward, and a way out is available when something goes wrong. The exception to that are vulnerable people who don’t know how to access alternatives. As an industry, we can get better at catering for alternative processes for when journeys go off-piste. What’s the service recovery? How is it handled outside of the process that’s been designed? That’s where people can get frustrated quite quickly.”

Kirk Bradley, Director of Customer Services, Bupa

How important is it for consumers to be served by someone of a comparable life stage? Opinions were divided on whether or not it could be detrimental for older customers to be served by younger advisors.

“Our workforce is not necessarily representative of customers, and that may be a disconnect.”

Phil Quickenden, Head of Service, Camden Council

“I’m not finding it much of an issue. You can train younger advisors to be empathetic.”

Kirk Bradley, Director of Customer Services, Bupa

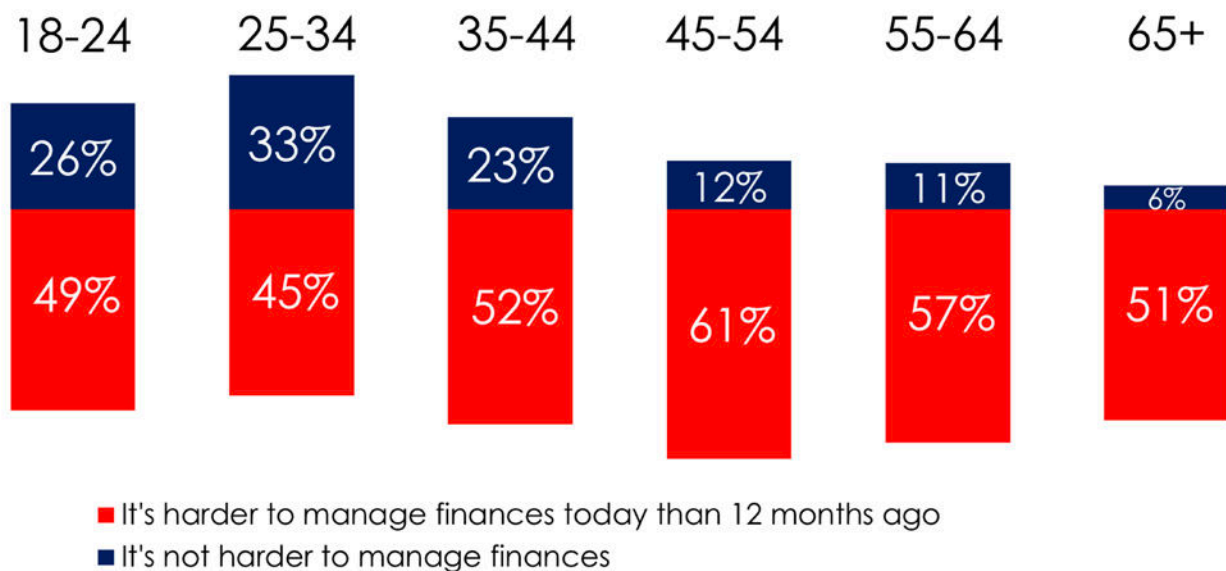
“We got a range of ages in the contact centre and our TNPS scores by age are broadly the same.”

Peter Sanderson, Head of Operations, Zurich

Possibly the most compelling underlying reason for declining perceptions of customer service among certain age cohorts is shown

in Figure 6. 45-64s are also the cohort that is reporting the greatest difficulty in managing their finances.

Figure 6: Would you say that you find it harder or easier to manage your finances today compared with 12 months ago, or about the same?



Base: 18-24 n=240, 25-34 n=340, 35-44 n=360, 45-54 n=371, 55-64 n=281, n=65+ n=408

As discussed earlier in this report, one's perceptions of customer service are strongly linked to one's ability to manage finances. People who are especially feeling the pinch

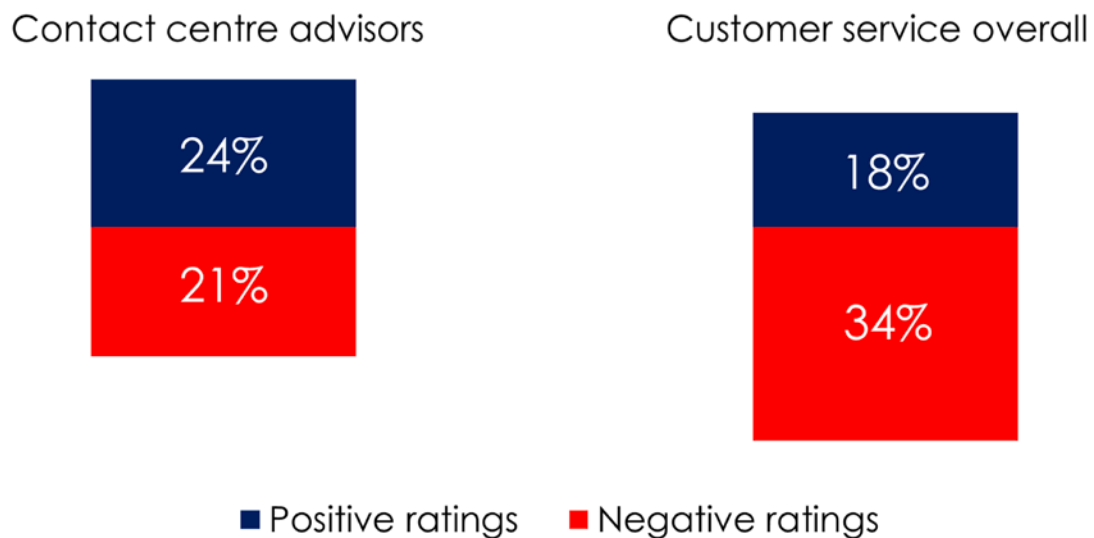
are in particular need of help from providers, with greater scope for disappointment when service delivery falls short of expectation.

Consumers distinguish between contact centre service delivery and overall CX

When asked specifically to rate the 'helpfulness of contact centre advisors', consumers tend to be more positive compared to ratings of customer service overall. Figure 7 shows the proportion of

positive ratings given to contact centre advisors outweighs negative ratings. Contrast this with the almost double the proportion of negative ratings given to customer service overall, versus positive ones.

Figure 7: 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?



Base: n=2,000

In a sense this is good news for contact centres: by and large, consumers don't hold the front line fully responsible for a bad customer experience. Yet with perceptions

of customer service in steep decline, it's more important than ever for organisations to address root causes.

"Our customer satisfaction scores are about 70% positive for 'how do you rate your landlord in terms of service delivery?' But overall satisfaction through following a transaction is around about 90%."

Adam Gould, Head of Customer Service, Castles & Coasts Housing Association

"The performance of my contact centre hasn't changed massively in the last 12 months. But we're seeing performance in the back offices changing, and the impact of that on the customer's experience."

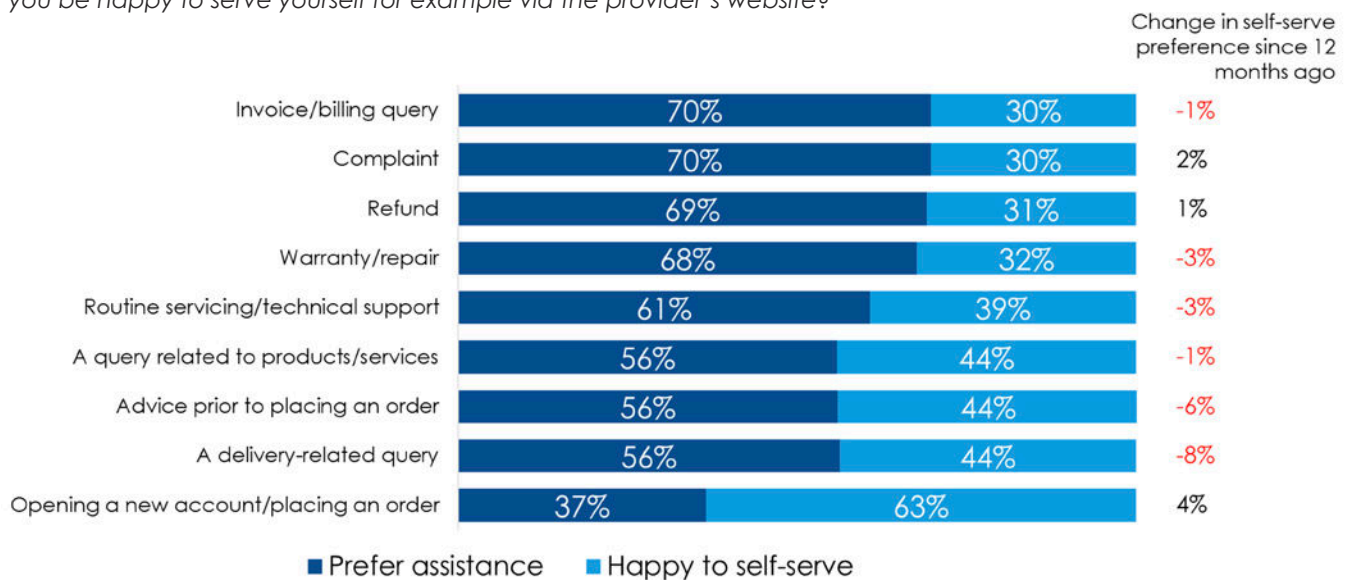
Phil Quickenden, Head of Service, Camden Council

Consumers are reverting back to assisted channels

Previous editions of Voice of the Contact Centre Consumer research reported a rise in acceptance of self-serve during the pandemic years, followed later by a shift back to preferring assistance for more complex queries. Figure 8 shows that in 2023 consumer acceptance of self-serve has remained broadly the same for the most complex

queries such as invoice, complaint and refund. However, a decline in self-serve acceptance is observed for other query types that in previous years had posted gains. Delivery-related queries fell from 52% self-serve acceptance in 2022 to 44% in 2023, and advice prior to placing an order dropped from 50% to 44% year on year.

Figure 8: 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=2,000

With more experience under their belts, the limitations of self-serve journeys are

increasingly apparent to consumers.

“You often find that digital journeys can be quite limited. You can’t do everything you need to do.”

Lisa Range, Head of Telephony Sales at Tyl by NatWest

“Some organisations are using technology without properly joining up the end-to-end experience for the customer. You’ll find yourself on one channel and when you want to swap or ask for help, it’s really difficult to then get to the other channel. And you have to start again.”

Kirk Bradley, Director of Customer Services, Bupa

“The ability to offer flexibility at short notice is easier with a human than through a digital channel.”

Jon Wells, Contact Centre Director, Carnival UK

“I wonder how much of the drop in acceptance of delivery-related self-serve is due to people going back to the office. And now it's not as simple to organise a delivery that fits your diary.”

Phil Quickenden, Head of Service, Camden Council

A sense of urgency and a need for reassurance have undoubtedly escalated during a period of economic headwinds.

“Services are emotive and that drives telephone contacts. You want somebody to empathise. And if somebody does empathise, potentially that will lead to a better outcome.”

Phil Quickenden, Head of Service, Camden Council

“If I'm going to be off work, I need to know my insurer will pay my salary, I want to be absolutely reassured.”

Peter Sanderson, Head of Operations, Zurich

In 2023 the concept of the 'digital concierge' has emerged, which reconciles consumers' desire to be assisted with the rise of self-serve. Digital concierges are human advisors who not only solve problems for customers but teach customers to solve problems themselves.

“We want our people to help customers through the process. And be very clear about how to intervene when it goes wrong and proactively intervene before it goes wrong. You need a lot more management information around that.”

Kirk Bradley, Director of Customer Services, Bupa

“To do this, our people need to first understand the journey themselves. So when a customer calls in, they actually understand what's happened.”

Carl Bromley, Head of Customer Experience, Ageas Group

Most importantly the option to choose human assistance must always be available.

“You've got to ensure when the customer wants to swap and wants to speak to somebody you've got agents available. Otherwise you're just setting yourself up for a huge fall.”

Carl Bromley, Head of Customer Experience, Ageas Group

Attracting people to a career in the contact centre

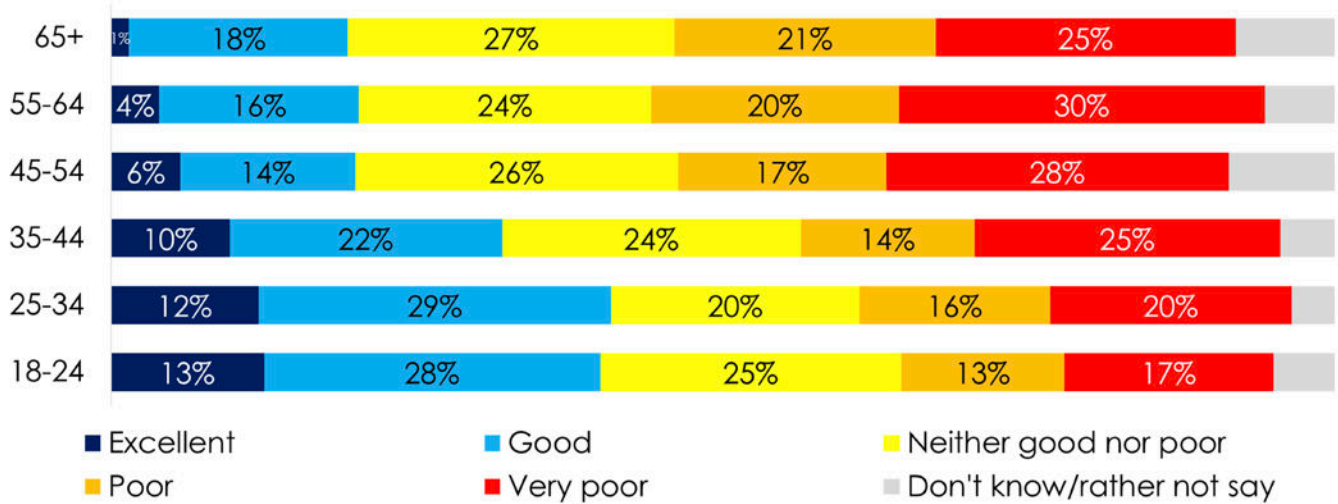
While the jury may be out on whether or not it's better for customers to be served by advisors of a comparable life stage, it is well accepted that a diverse workforce is a good thing.

Furthermore, with recruitment continuing to be difficult in a tight labour market some contact centres are actively targeting mature

candidates: for example, people who exited the labour force during the pandemic or parents who require the flexibility that contact centres can offer.

Unfortunately, as Figure 9 illustrates, there is still work to do to convince people in their 40s and above.

Figure 9: How would you rate customer service as 'a job you would like to do'?

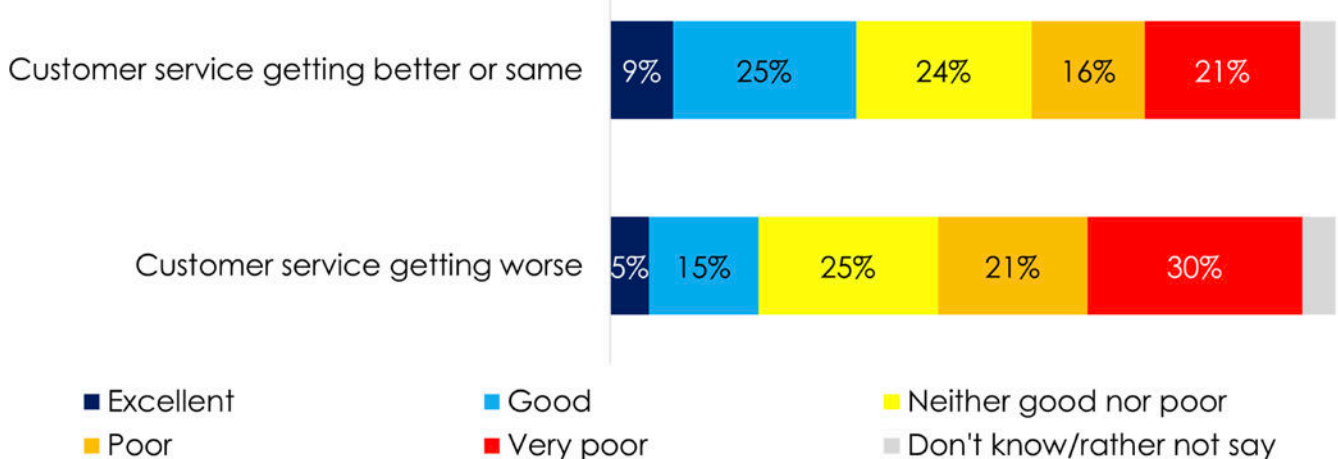


Base: n=2,000

It's also apparent that people who consider customer service standards to be declining are

also more likely to reject a career in customer service, as Figure 10 shows.

Figure 10: How would you rate customer service as 'a job you would like to do'?



Base: customer service better or about the same n=1,199, customer service getting worse n=681

“If you think about the times you've got frustrated with the person on the other end of the phone, that's not going to encourage you to take those roles. You feel you're just going to constantly deal with disgruntled customers.”

Lisa Range, Head of Telephony Sales at Tyl by NatWest

“If you look around organisations, there is so much talent that's come from the contact centre. We just don't do a good enough job of promoting the career pathways. People join as a stopgap, not necessarily to forge a career.”

Lisa Range, Head of Telephony Sales at Tyl by NatWest

5 discoveries

from Voice of the Contact Centre Consumer 2023

- 1** In 2023 the proportion of those who believe customer service is worsening (34%) is now almost double the proportion of those who believe service is improving (18%).
- 2** A year of rising costs has taken a toll. More than half (53%) of people surveyed report that it's become harder to manage their finances, and people who are finding it harder to manage their finances tend also to be less positive about the state of customer service.
- 3** More than half (53%) of surveyed consumers report having become angry or upset when dealing with a contact centre advisor in the past 12 months.
- 4** Consumers don't hold the front line fully responsible for a bad customer experience. Ratings of contact centre advisors are more positive than ratings of customer service overall.
- 5** Consumer preference is reverting back to assisted channels as the urgency of query resolution and need for reassurance has escalated, and they have become aware of the limitations of self-serve journeys.

About the CCMA

For nearly 30 years, the CCMA (Call Centre Management Association), as the longest established contact centre industry body, has been dedicated to supporting contact centre leaders across the UK. 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.

Membership of the largest community in the industry offers unique opportunities, such as free annual benchmarking of 20+ KPIs, free entry into the UK National Contact Centre Awards and free tickets to the UK National Contact Centre Conference, invites to Executive Networking Dinners and exclusive events for members-only. Members also benefit from discounted training through the UK National Contact Centre Academy, the industry's training partner.

To support the industry further, the CCMA conducts regular original research for download, including the annual Salary and Skills Guide and the Voice of the Contact Centre Consumer research, the Evolution of the Contact Centre tracking the industry's progress and Good Practice Guides on a variety of topics.

www.ccma.org.uk

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

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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



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