

Voice of the Contact Centre Consumer 2024



A CCMA Research Initiative

Supporting Partner

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The industry's benchmark for consumer perceptions of customer contact experiences and providers

Each year, the CCMA conducts a comprehensive study into consumer contact experience: Voice of the Contact Centre Consumer. The research series uncovers how customer contact needs, expectations and behaviours are evolving and how consumers perceive providers.

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.

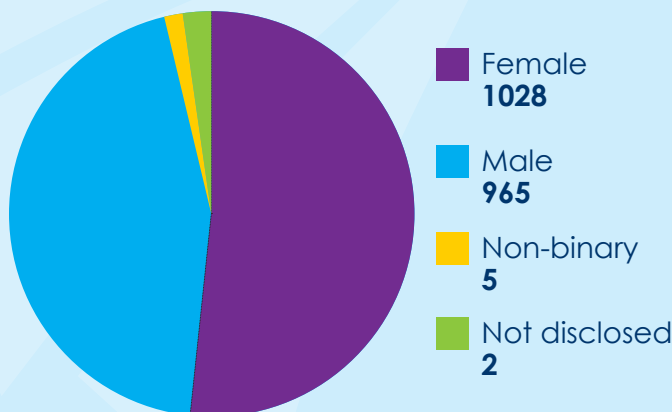
Research methodology

The Voice of the Contact Centre Consumer 2024 research comprised two distinct phases.

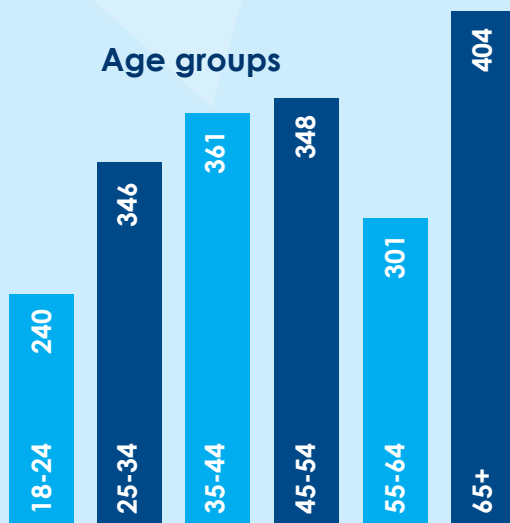
In the first phase n=2,000 online interviews were conducted with UK consumers from

19-26 March 2024. Quotas were set by age, gender and region to ensure a nationally representative sample. The composition of the sample was as follows:

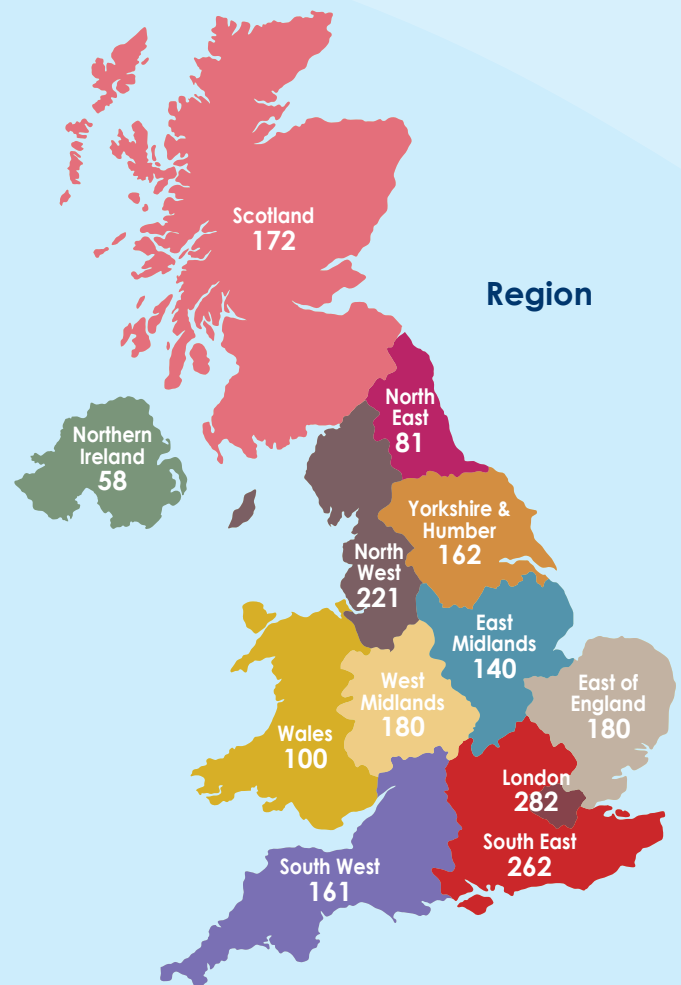
Gender



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 some of which is included in this report.

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. Those able to be mentioned are below.

Sarah Card, Head of Delivery and Risk, Marcus by Goldman Sachs

James Cotter, Operations Manager, UK Power Networks

Andy Holbert-Rolls, Senior Continuous Improvement Manager, Ageas UK

Alex Huntley, Head of Customer Service Strategy, Entain Group

Stacey Mairs, Head of Customer Experience, Bensons for Beds

Sabina Onwuka, Head of Customer Services, London Borough of Barking & Dagenham

Helen Richardson, Head of Telephony, Intermediary Mortgages, HSBC UK – Intermediary Mortgages

Chris Ward, Head of Customer Relations, Markerstudy

Foreword by CCMA

This 2024 edition of CCMA's Voice of the Contact Centre Consumer research, the definitive source of consumer understanding for our industry, is good news for our industry.

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

After the lows of 2023, this year we are seeing positive perceptions bounce back, especially in hard-pressed sectors such as utilities and public transport. Contact centres deserve credit for having redoubled their efforts to support customers during difficult operating conditions.

However, as always there remains much work to do. We continue to observe consumers turning away from self-serve, jaded by poor

experiences. Can AI provide the upgrade in self-serve experiences that will bring consumers back?

In this year's edition, we explore public perceptions of AI deployment in customer service. Unsurprisingly, these reflect much of the wider public discourse on the topic. The risks are more salient than the benefits, and consumers worry about losing the human touch. Inevitably, our own colleagues will share similar concerns with the added fear of a negative impact on their roles. The onus is on our industry to make informed decisions about AI, and to reassure both internal and external audiences.



Leigh Hopwood,
CEO, CCMA

Foreword by Odigo

Odigo is proud to support once again the research carried out by the team at the CCMA. This, the 5th consecutive year of data, gives us a clearer picture of how the contact centre space is evolving and the steps that have been taken to build better customer experiences. This progress continues year on year, not just by the advances in technology, but also through the amazing work people within this industry perform each day.

As technology evolves at an unprecedented pace, contact centres find themselves at the forefront of innovation, constantly adapting to meet the ever-changing needs of customers. This research not only explores the current state of contact centres but also sheds light on how AI is paving the way for an exciting road ahead within our industry.

AI-driven solutions give the promise of revolutionising customer interactions,

streamlining processes, enhancing personalisation, and improving overall efficiency. From chatbots capable of handling complex queries to AI-powered analytics providing actionable insights, the possibilities are limitless.

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



David Mason
Director of Service and Operations
UK and Ireland

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

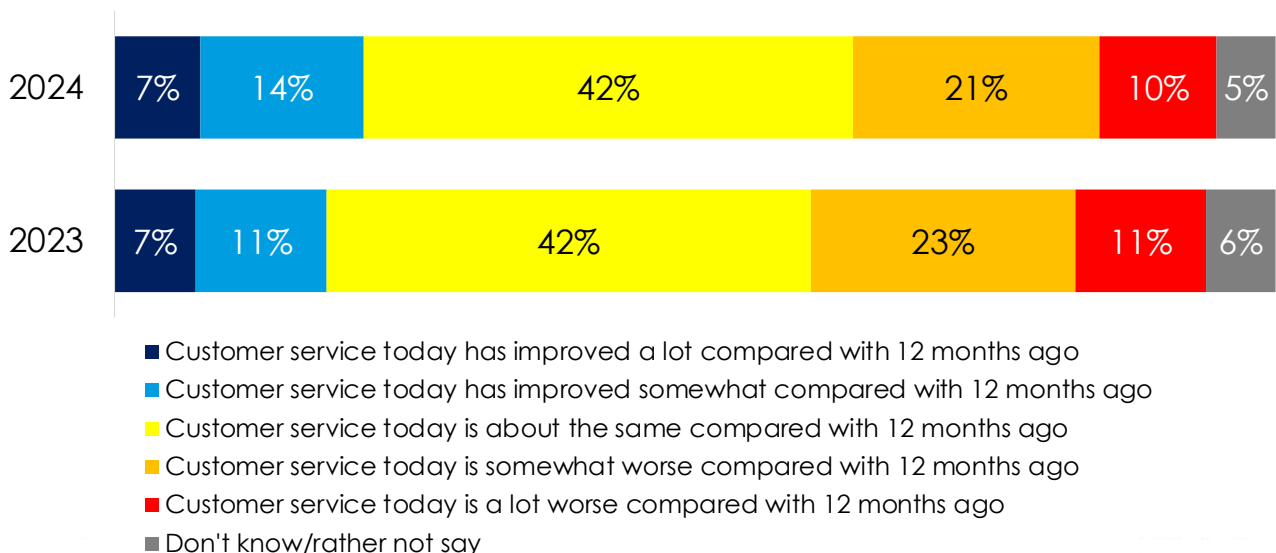
In 2023, consumer perceptions of customer service took a sharp turn for the worse compared with 2022, with the proportion of consumers who felt customer service was declining (34%) being almost double the proportion of those who felt service was improving (18%).

In 2024 there has been a swing back to

a more positive direction, albeit not a marked swing. Figure 1 shows the proportion of consumers who feel customer service has improved grew from 2023 to 2024 by three percentage points (to 21%), and the proportion who feel customer service has worsened shrank by three percentage points (to 31%).

While there has been a slight improvement from 2023 to 2024, the proportion of consumers who feel customer service is getting worse (31%) still considerably outweighs those who feel it is getting better (21%).

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

"Due to rising energy costs, customers became more sensitive to speed of response and resolution of issues. Our satisfaction scores are still high, but we had to work really hard to maintain them. We put a lot of new technology in and accelerated our investments to make sure we were answering quickly."

James Cotter, Operations Manager, UK Power Networks

"Covid bogged down supply chains and Brexit has had a huge impact on getting parts and replacement vehicles. There's a whole load of delays, red tape and shortages. There has been a disconnect between customer expectations and the reality of what's been deliverable. However, it is up to firms to ensure effective communication and the best outcomes possible given the circumstances."

Chris Ward, Head of Customer Relations, Markerstudy

"Cost of living means that customers buying big-ticket items expect quite a lot from the service (as it's an emotive purchase). After Covid there was a lot of forgiveness, but we see less of that now. We still feel the impact from the Red Sea (shipping restrictions) but customers just expect more, so we need to be able to meet and exceed expectations."

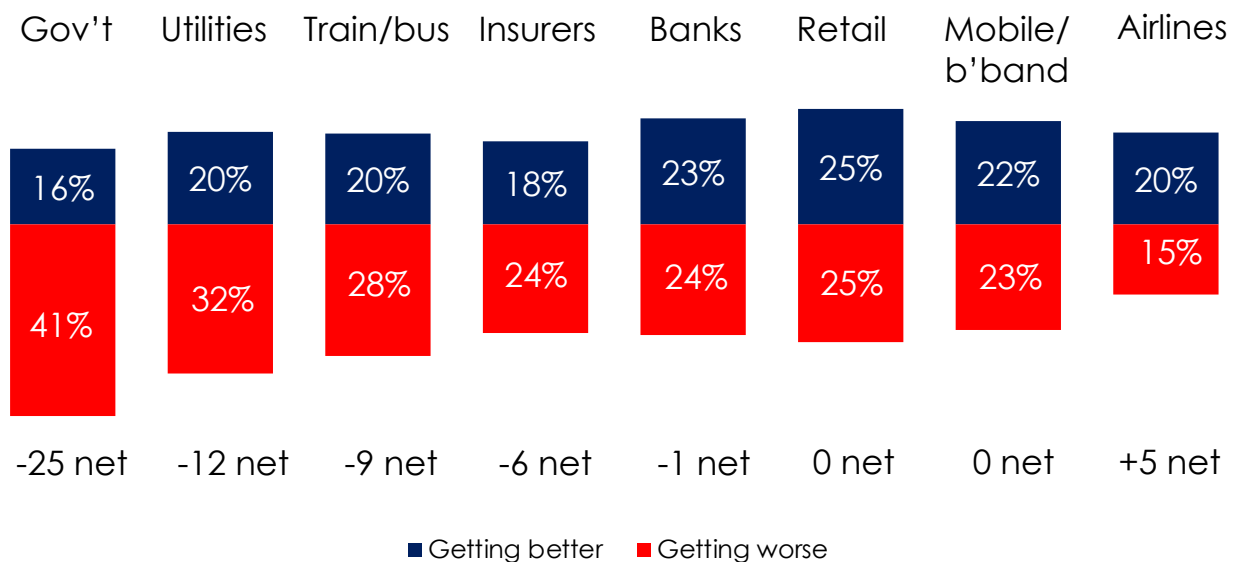
Stacey Mairs, Head of Customer Experience, Bensons for Beds

Perceptions vary considerably by sector

When asked if they felt customer service was improving or not within individual industries, consumer opinions varied considerably by sector. Figure 2 ranks sectors from left to right,

with sectors on the right receiving the most positive ratings and the sectors on the left receiving the least positive ratings.

Figure 2: Would you say that customer service today from [SECTOR] has improved, worsened or stayed the same in the past 12 months, generally speaking? (NB: % 'stayed the same' not shown, figures rounded to nearest 1%).



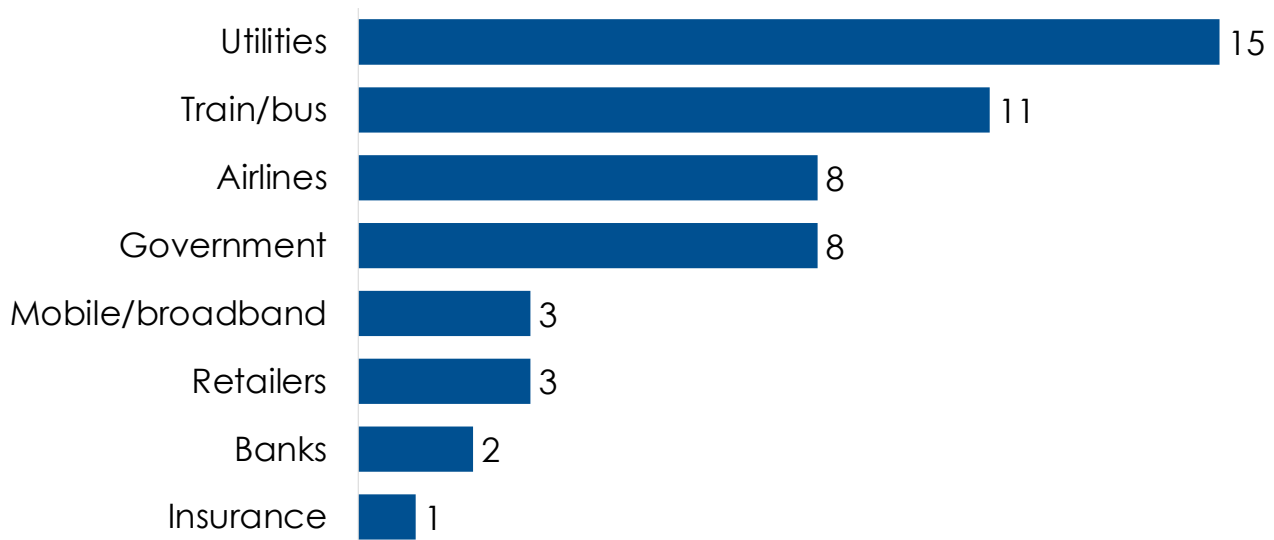
Base: n=2,000

Ratings for some sectors have improved significantly in just one year

While only one industry – airlines – received net positive ratings in 2024 for customer service, ratings across all sectors are more positive than in 2023. Figure 3 shows the percentage-point increase from 2023 to 2024

by industry, with utilities and train/bus seeing the largest uplifts in positive sentiment (+15 more positive and +11 more positive than in 2023 respectively).

Figure 3: Would you say that customer service today from [SECTOR] has improved, worsened or stayed the same in the past 12 months, generally speaking? (Change in NET scores from 2023 to 2024).



Base: n=2,000

The size of the uplift in perceptions of customer service overall (up three points in 2024) are in line with the telecom, retail and banking sectors, whereas the improvements in utilities, public transport and government are much larger. It follows that sectors with the poorest

ratings might see the biggest gains as there is greater scope for improvement to begin with. Another possible explanation is that consumers' minds may turn first to the likes of telecom, retail and banking when asked to think about customer service overall.

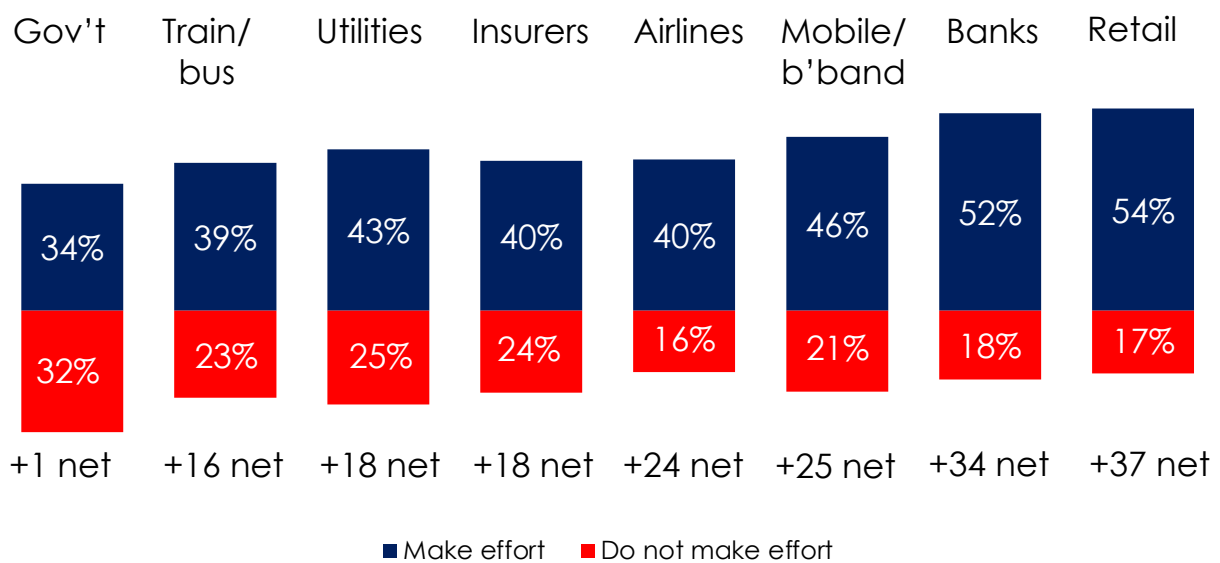
Although more consumers overall still think customer service from utilities is getting worse than is getting better, utilities have seen a 15 percentage-point gain in net rating from 2023 to 2024.

Consumers are much more positive about the effort made by contact centre advisors

When asked whether they felt customer service advisors, our frontline colleagues, made an effort to help customers or not, consumer ratings are much more positive

compared with their overall ratings of customer service. All sectors received net positive scores, ranging from government at +1 net and retail at +37 net as Figure 4 shows.

Figure 4: Thinking specifically about customer service departments working for [SECTOR], would you say that their customer service staff make an effort to help customers, or not? (NB: % 'neither make effort nor do not' not shown, figures rounded to nearest 1).



Base: n=2,000

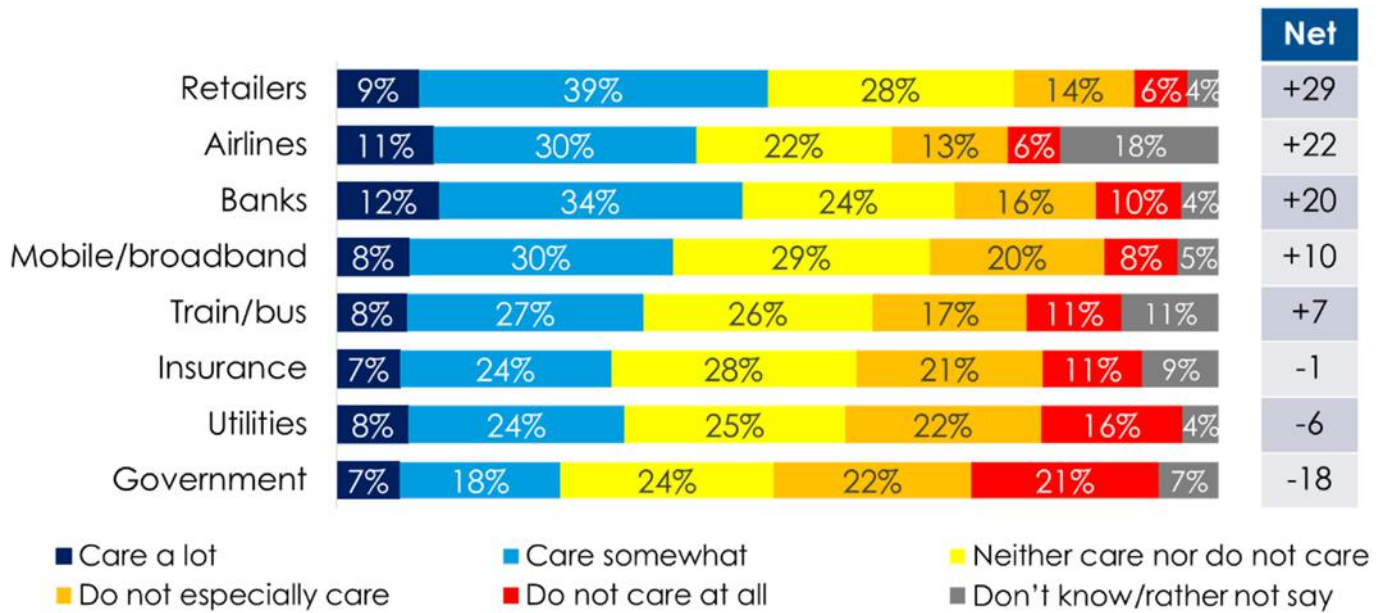
"I've changed the culture in my team to be more resolution-orientated. Now the advisor isn't just a go-between but works actively with the back office (to solve the problem)."

Sabina Onwuka, Head of Customer Services, London Borough of Barking & Dagenham

Consumers were also asked if they felt organisations cared about their customers. Results are shown in Figure 5, once again

revealing stark differences by sector ranging from -18 for government and +29 for retailers.

Figure 5: Would you say that [SECTOR] care about their customers or not, generally speaking?



Base: n=2,000

The category effect

Sectors with poorer ratings across all dimensions (customer service, effort made by customer service departments, care about their customers) are ones that tend to have 'captive' customers: the choice of provider is more limited and there are high barriers to switching. Conversely, sectors with more positive ratings are ones where there tend to be more providers competing for customers, and switching is easier.

It follows that greater choice tends to be

a powerful driver of positive customer perceptions. Regardless of whether or not service standards are objectively better in more competitive industries, choosing one's own provider (rather than being forced to use a provider because no others are available) is likely to pre-dispose consumers to feel more positively. It is also true that highly competitive industries tend to spend more on marketing communication, which also influences consumer perception.

"There's a lot in the media particularly around banks and financial services in terms of what customers should expect. There's less coverage of other sectors. That might be influencing perceptions."

Sarah Card, Head of Delivery and Risk, Marcus by Goldman Sachs

There can be no doubt that media coverage plays a role in influencing ratings at the sector level.

“This reflects the social impact, what's happening in government today, what's happening in utilities and public perception.”

Sabina Onwuka, Head of Customer Services, London Borough of Barking & Dagenham

Another lens through which to interpret sector differences is commodity versus premium: products and services which customers perceive to be commodities are more

challenging for providers to score highly on, as the opportunity to deliver moments of delight and value-add are more limited and the risk of 'disappointment' is greater.

“There's a lot riding on your housing or your utility. They're more emotive, and basic essentials for everyday life.”

Helen Richardson, Head of Telephony, Intermediary Mortgages, HSBC UK – Intermediary Mortgages

“Nobody rings an insurer because they want to chat or because they want to have a nice experience.”

Chris Ward, Head of Customer Relations, Markerstudy

“So much of this is about customers feeling value for money. It's feeling that I'm paying more than I was before but I'm not using more electricity. I'm getting the very same service but paying a lot more for it and it's hard for the customer service team to fill that gap. If something goes wrong and we fix a fault, customers feel value when they get the 1-1 interaction.”

James Cotter, Operations Manager, UK Power Networks

“For retail, broadband and airlines there's a sales element in there as well, which people perceive as customer service. They're always going to get a really nice sales experience [in these categories] compared with government, trains and utilities, which are more of a necessity/obligatory purchase.”

Stacey Mairs, Head of Customer Experience, Bensons for Beds

Higher scores may be attributed in part to some sectors tending to offer a broader omnichannel mix.

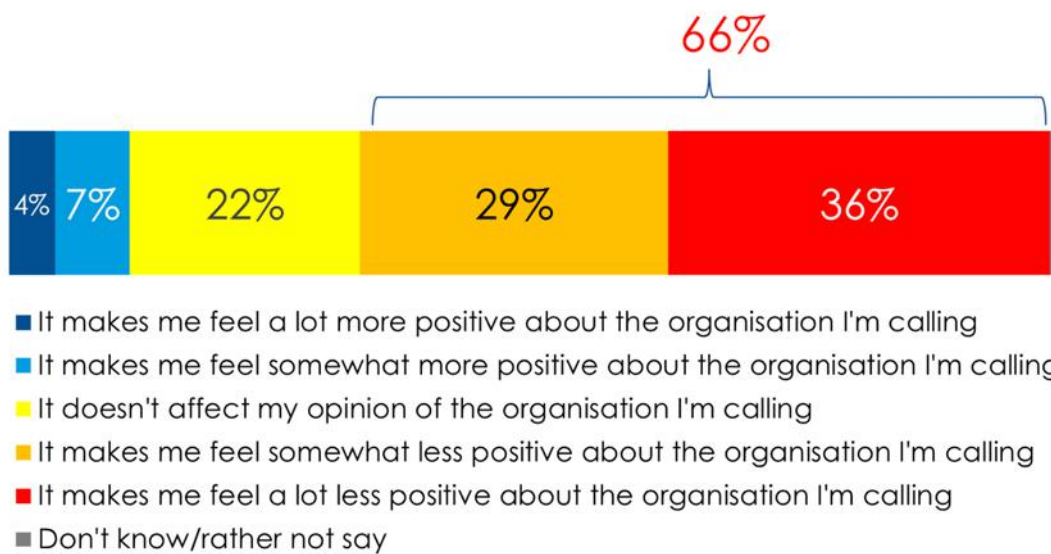
‘Your call is unimportant to us’

The use of recorded messages in call queues has attracted mainstream attention of late. According to the Voice of Contact Centre Consumer 2024 research, nine of 10 consumers (90%) who have tried to contact an organisation by phone in the previous year

report having heard a recorded message along the lines of ‘we are experiencing unusually high call volumes’. Among this group, two out of three (66%) say it makes them less positive about the provider they are calling.

Two out of three consumers (66%) who hear ‘we are experiencing unusually high call volumes’ say it makes them feel less positive about the provider.

Figure 6: When you hear a recorded message saying ‘we are experiencing unusually high call volumes’ – or words to that effect, which of the following best describes your reaction?

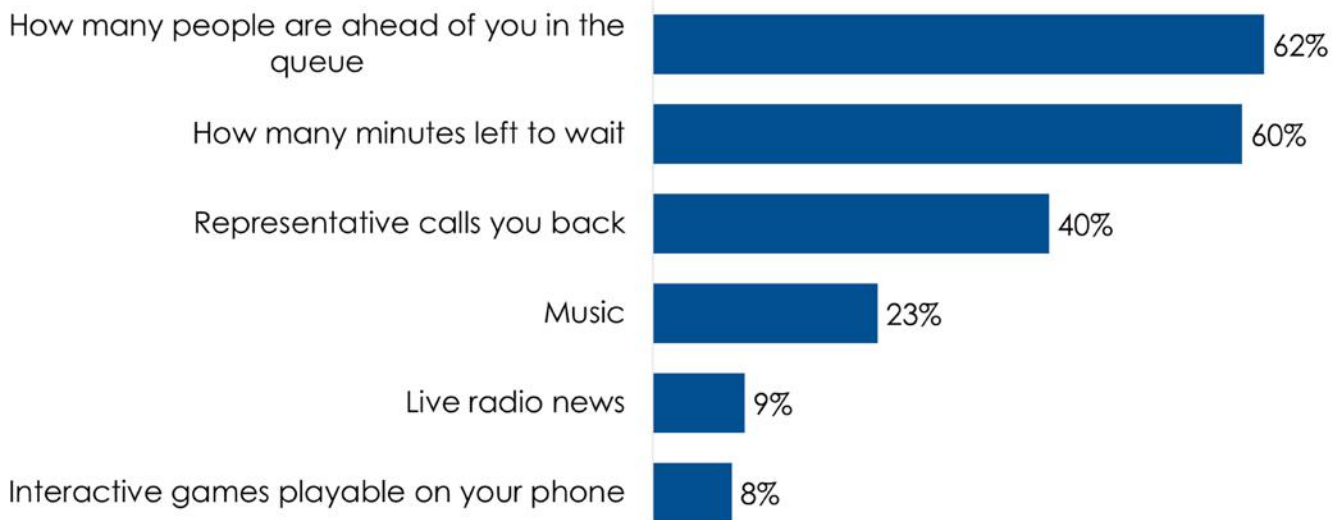


Base: n=2,000

When asked what they would actually like to hear when waiting in a call queue, knowing their position in the queue and how many

minutes left to wait topped the consumer wish list as shown in Figure 7.

Figure 7: When you're waiting in a call queue for a customer service representative to answer, which of the following would you find useful? Please select all that apply.



Base: n=2,000

Many providers have engineered their call queues to improve the customer experience of waiting, and some are deploying tools to

nudge waiting customers towards alternative channels, or to conduct authentication during the waiting period.

"The voice bot is going to be the new thing, to let people know they don't have to actually be in the queue."

Sabina Onwuka, Head of Customer Services, London Borough of Barking & Dagenham

"My next iteration is channel switching: utilising WhatsApp within the IVR. If you want to speak to us via WhatsApp, you can do this from within the IVR and we will contact the customer."

Stacey Mairs, Head of Customer Experience, Bensons for Beds

Are consumers turning away from self-serve?

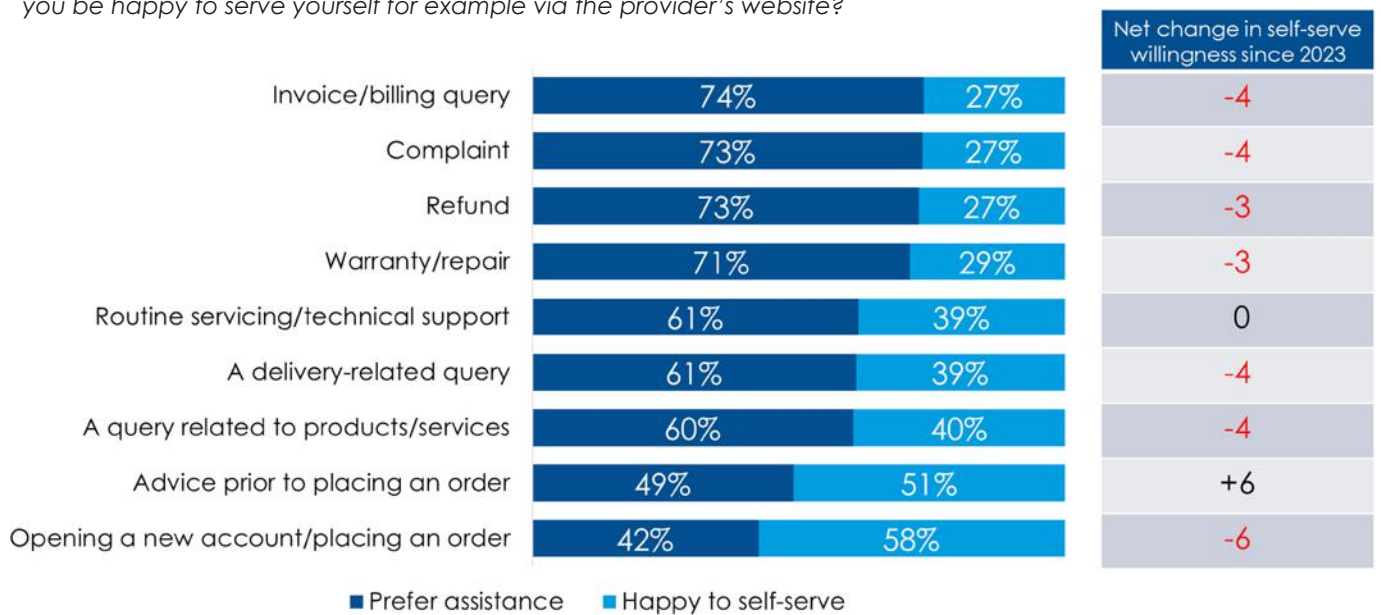
Previous editions of our Voice of the Contact Centre Consumer research reported a rise in acceptance of self-serve during the pandemic years, followed later by a reversion back to preferring assistance for more complex queries.

Figure 8 shows that in 2024 consumer preferences continue to revert to desiring

assistance across most journeys. With the exception of 'advice prior to placing an order' where willingness to self-serve has jumped from 44% in 2023 to 51% in 2024, and 'routine servicing/self-service' where preference is unchanged since 2023, there has been a marked decline in consumer willingness to self-serve.

Across most customer journeys, consumers' willingness to use self-serve continues to decline.

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

"We asked in a customer focus group: what means the most to you from a customer service point of view? A lot of the feedback that we got was around having had so many bad experiences [with self-serve], that they'd rather pick up the phone now and speak to a human."

Stacey Mairs, Head of Customer Experience, Bensons for Beds

Offering the opportunity to switch to live assistance is now widely accepted as a pre-requisite for any self-serve journey. However, consumers' experiences with journeys where

it is difficult or impossible to switch may be contributing to declining favourability towards self-serve.

"We've got to make sure customers have got an escape route out, and it's clear and it's not hidden or made as difficult as it can be."

Chris Ward, Head of Customer Relations, Markerstudy

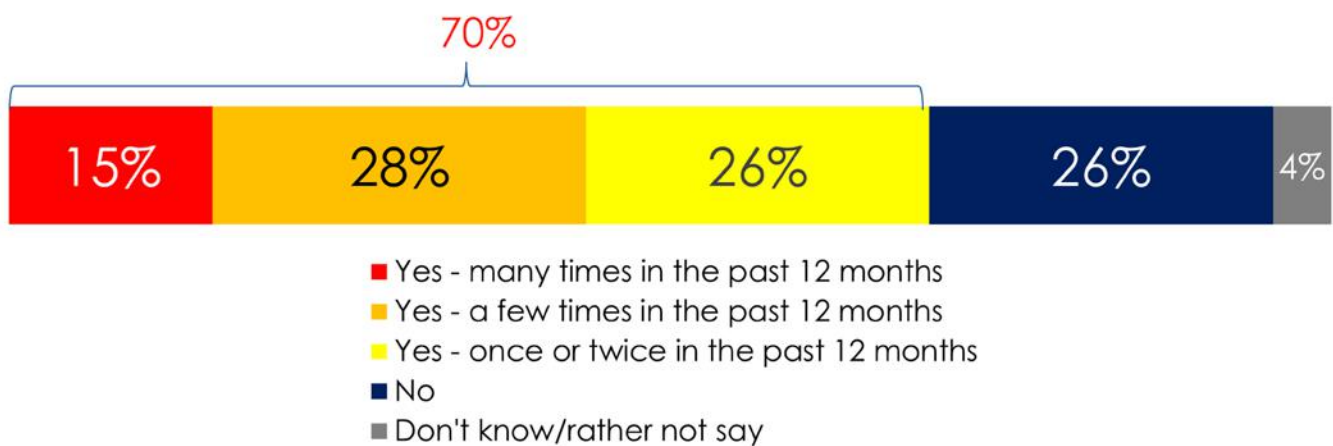
"I know all the service deflection tricks as I have worked in the industry for a long time. But more customers are becoming savvy to it as well."

James Cotter, Operations Manager, UK Power Networks

A new type of failure demand

A potential reason for the growth in consumer preference for assistance is shown in Figure 9. Seven out of 10 consumers report having failed to complete a self-serve journey in the past year, needing to resort to assistance to resolve their issue.

Figure 9: In the last 12 months, have you tried to resolve a query yourself without contacting customer service for example via a provider's website, app or chatbot, but ended up having to speak with customer service team by phone, email or live chat because you could not resolve the issue by yourself?



Base: n=2,000

"We found that customers didn't feel fulfilled within self-serve journeys, didn't get enough information, didn't have the same 'right first time' outcome as they would have done if they'd spoken to an advisor. It just meant that we delayed the queue. We're now thinking beyond deflection and more about if a journey allows us to deliver right first time."

James Cotter, Operations Manager, UK Power Networks

As providers learn from their past mistakes and self-serve experiences improve, it is predicted that consumer perceptions will rebound.

"We've probably got another two years [of declining perceptions]. Once we've become really good at self-serve, live chat and AI is a part of that, they will start to rise again because we'll hopefully have got it right for the customer and confidence in using these channels will grow."

Stacey Mairs, Head of Customer Experience, Bensons for Beds

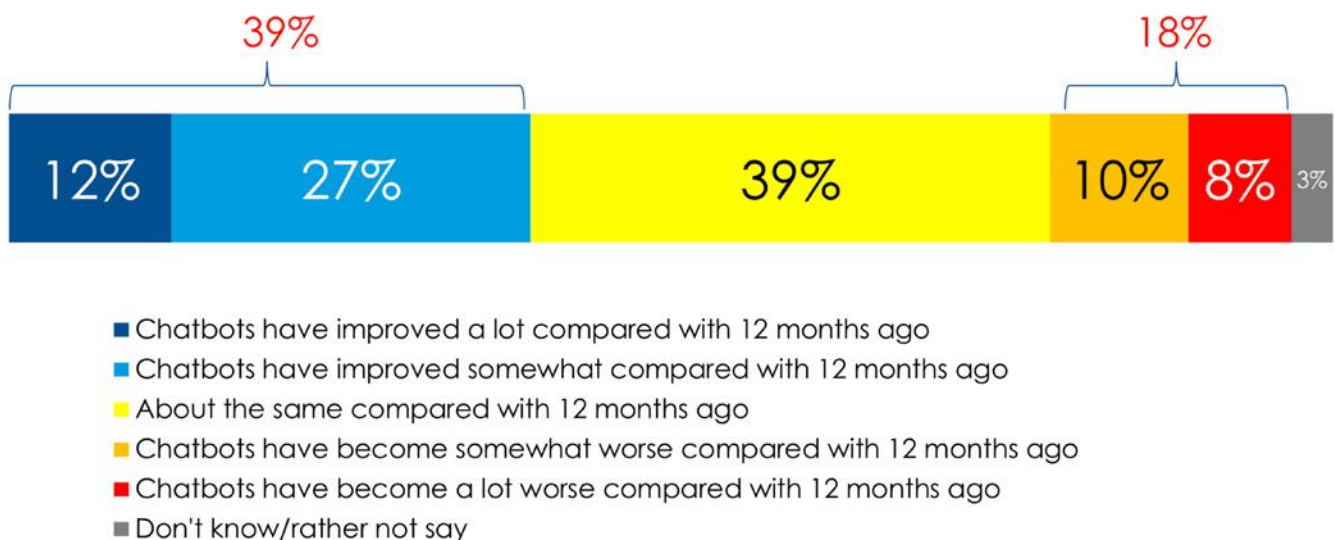
Chatbots are getting better, say consumers

Can chatbots come to the rescue of self-serve? Seven out of 10 UK adults (70%) said they had interacted with a customer service chatbot in the prior 12 months. Of these, more believe that chatbots are getting better

than getting worse. Figure 10 shows that the proportion of those who believe chatbots have improved (39%) is more than double the proportion who feel chatbots are worse than before (18%).

The proportion of consumers who feel chatbots are getting better (39%) outstrips those who feel chatbots are getting worse (18%) by two to one.

Figure 10: Would you say that the quality of chatbots has improved, become worse or stayed about the same, compared with 12 months ago?



Base: n=1,410 (interacted with chatbot in prior 12 months)

Consumers' comments on why chatbots are improving:

"I'm not having to repeat myself as much to them."

"More flexible rather than yes and no."

"The chat appears more fluent in its presentation and rarely goes wrong or asks spurious questions."

"They are available more often and seem to have a wider range of questions they can answer."

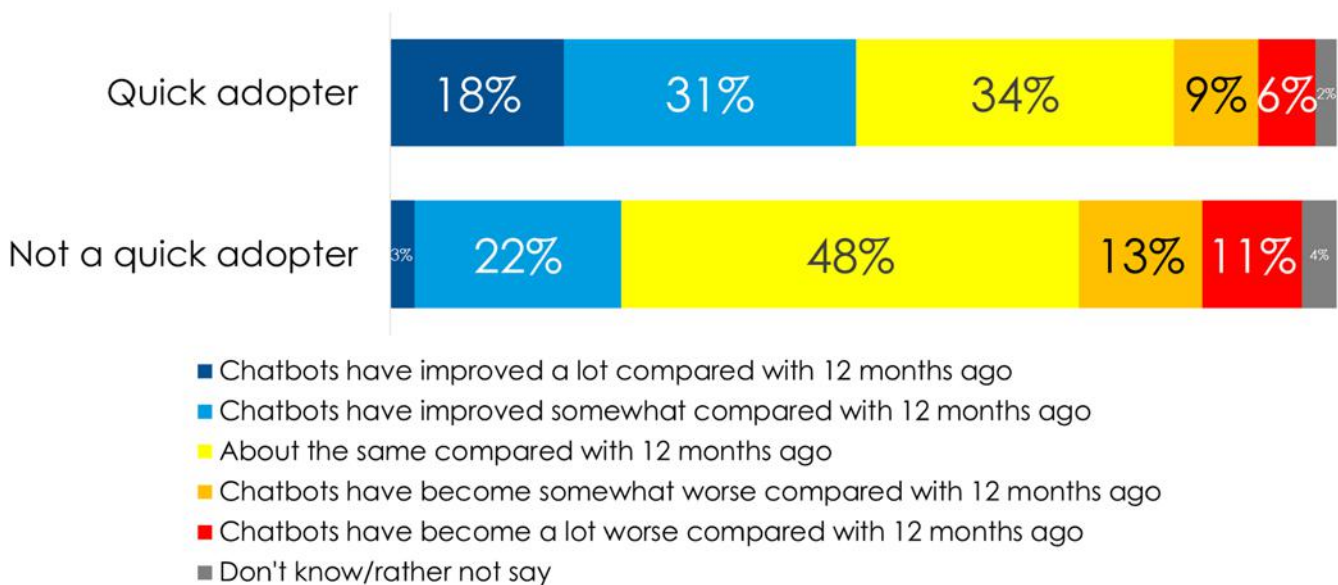
"Many chatbots now support multimodal interactions, allowing users to engage with them through text, voice, images, and even gestures. This flexibility enhances user experience and accessibility."

Not everyone feels the same about chatbot progress. Those who consider themselves quick adopters of digital contact channels (51% of the population) are much more likely to feel positive about chatbot progress than who are not fast

adopters (46% of the population).

Figure 11 shows that the proportion who feel chatbots are improving is twice as many among quick adopters compared with non-quick adopters (49% versus 24% respectively).

Figure 11: Would you say that the quality of chatbots has improved, become worse or stayed about the same, compared with 12 months ago? versus 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 adopter n=845, not a quick adopter n=548, have used chatbot in prior 12 months

“Earlier adopters have more experience of earlier chatbots and therefore are more aware of how they’ve progressed. Later adopters may not have the experience with older chatbots.”

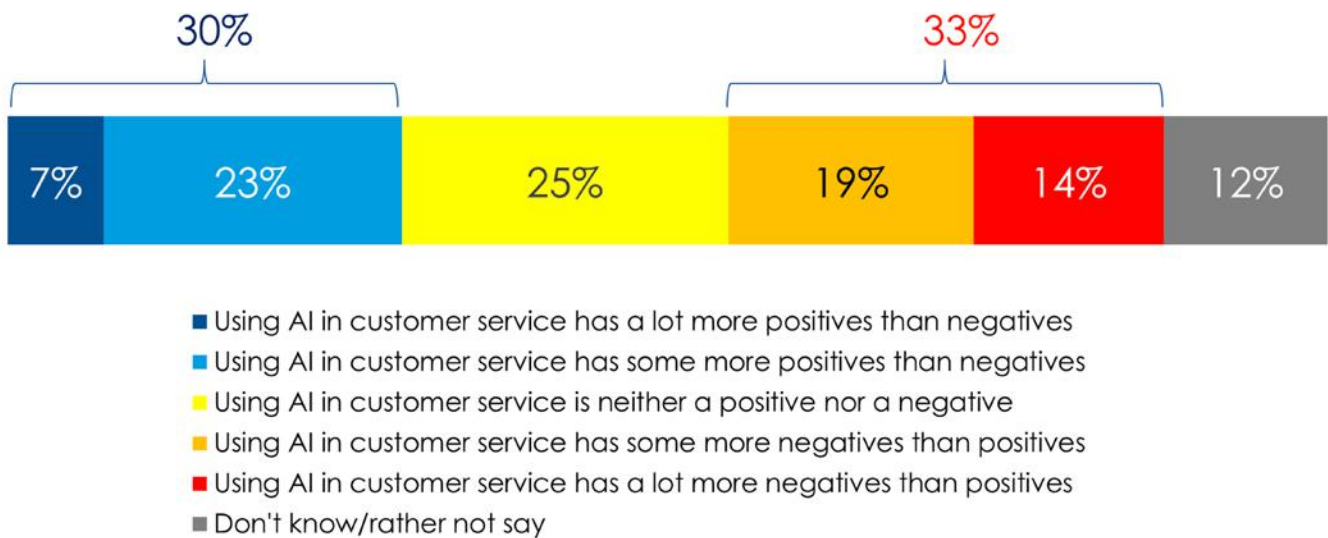
James Cotter, Operations Manager, UK Power Networks

Consumers are divided on the merits of AI in customer service

When asked whether the use of artificial intelligence (AI) in customer service has more positives than negatives or vice versa, the consumer population is divided into three camps of approximately equal size as shown

in Figure 12: those who believe AI is a net positive, those who feel AI is a net negative, and those who feel AI in customer service is neither a positive nor a negative or ‘don’t know’.

Figure 12: Overall, would you say the use of AI in customer service has more positives than negatives, or vice versa?



Base: n=2,000

AI risks are more salient than benefits

When asked to pick which benefits they foresaw AI bringing to customer service, the top pick was 'assist human advisors in contact

centres with information and suggestions', as shown in Figure 13.

Figure 13: The following are some descriptions of how AI might positively impact customer service. Please select all of the ones which you believe are true, or none if you believe none of them are true.



Base: n=2,000

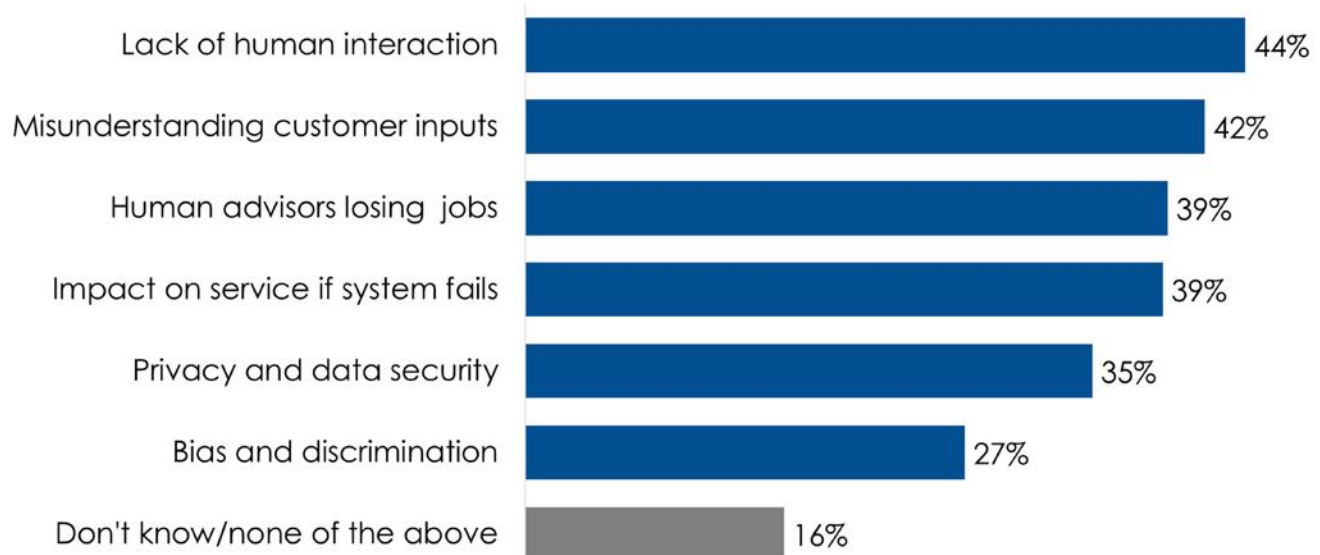
The top pick was only selected by one in three consumers and 27% did not pick any of the potential benefits at all, suggesting that

positives of AI in customer service are not yet apparent to many consumers. Contrast this with the perceived threats that

AI poses. Figure 14 shows that five out of six potential risks were picked by more consumers than picked the top benefit. The proportion of

consumers who did not pick any of the threats (16%) is much lower than the proportion who selected none of the benefits (27%).

Figure 14: The following are some descriptions of how AI might negatively impact customer service. Please select all of the ones which you believe are true, or none if you believe none of them are true.



Base: n=2,000

The top perceived benefit 'assist human advisors' and the top perceived risk 'lack of

human interaction' share a common theme: the value of human interaction.

"It's the fear that it will take away choice. I choose to speak to you by voice or chat and I fear that if you introduce all this amazing AI, I now don't have a choice."

Stacey Mairs, Head of Customer Experience, Bensons for Beds

"AI gives us operational flexibility, but it doesn't replace service. It doesn't laugh with our customers, cry with our customers or share experiences with our customers. It's the difference between service, and service with purpose."

James Cotter, Operations Manager, UK Power Networks

The worries and fears of the general populace will inevitably be shared by colleagues in the contact centre. Regardless of where an organisation may be in its AI adoption curve,

leaders have a responsibility to understand as much as they can about AI's benefits and risks, and proactively and openly discuss with their teams.

Although AI has not yet evolved to the point where it can listen, empathise and reassure customers in the way that humans can, it can

already assist human advisors to be more empathetic.

“AI can be a control layer, guidance that sits in the background, not necessarily exposed to the customers and end users but quality checking and analysing sentiment, to learn and help our people to have conversations.”

Chris Ward, Head of Customer Relations, Markerstudy

Consumers' comments on AI benefits:

“I feel that AI can be used well as long as an organisation properly trains the AI model. It can be especially useful when customers have technical queries.”

“I like to see it implemented, it seems that most places currently use it as a triage system before turning to an advisor and I think this is preferable.”

“There are benefits in terms of time taken to resolve a customer query, but only if the query is a relatively simple one, and if the customer is tech-savvy and comfortable with the interaction.”

“I think there should be humans quality checking and supervising the work carried out by AI.”

“AI has come to stay, but we must use wisdom.”

“The organisation must use the highest quality of AI algorithms and not cut corners.”

Consumers' comments on AI risks:

“It will reduce human interaction and make people more remote and less caring about one and another.”

“It gets humans out of any accountability.”

“AI cannot possibly handle the nuance needed in good customer service.”

“I am especially concerned about the way AI can perpetuate stigmas/biases without this being acknowledged as a flaw.”

“The possible mishandling of data or misinterpretation of queries is something that worries me.”

“I think using AI is discriminatory as everyone does not have access to these processes e.g. those in deprivation, some elderly people or other vulnerable groups.”

8 discoveries

from Voice of the Contact Centre Consumer 2024

- 1** Overall perceptions of customer service have improved slightly, but in specific sectors perceptions have seen significant improvements from 2023 to 2024, led by utilities which are up 15 percentage points.
- 2** Compared with their perceptions of customer service overall, consumers are much more positive about the efforts made by contact centre frontline colleagues.
- 3** A strong 'category effect' is observed, where perceptions of customer service by sector are influenced by the wider relationship between the consumer and the sector, such as how easy or difficult it is to switch provider, as well as media coverage and the level of understanding the consumer has of root causes of problems.
- 4** Two out of three consumers (66%) who hear 'we are experiencing unusually high call volumes' say it makes them feel less positive about the provider. Many providers are working hard to improve the wait experience, such as offering channel switching or authenticating in the call queue.
- 5** Consumers continue to turn away from self-serve for all but the most straightforward queries. 70% say they have failed to complete a self-serve journey and were forced to seek assistance.
- 6** Can chatbots come to the rescue of self-service? As consumers become more familiar with chatbots and chatbot technology evolves, the proportion who feel chatbots are getting better outstrips those who feel chatbots are getting worse by two to one (29% versus 18% respectively).
- 7** However, when it comes to the broader topic of deploying AI in contact centres, risks tend to be more salient to consumers than benefits. The onus is on providers to strengthen trust through transparent, ethical implementation.
- 8** The top perceived AI benefit 'assist human advisors' and the top perceived AI risk 'lack of human interaction' share a common theme: the value of human interaction.

About the CCMA

For 30 years, the CCMA (Call Centre Management Association) has been the longest established contact centre industry body who are 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 contact centre community offers unique opportunities, such as free annual benchmarking of 25+ KPIs, access to become an Accredited Contact Centre with the Contact Centre Standards Framework, free entry into the UK National Contact Centre Awards, free tickets to the UK National Contact Centre Conference, invites to Executive Networking Dinners and Leadership Forums, and other 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 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.

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