



Customer services observatory 2024

For the Customer Service of the Year



What methodological device?



ADMINISTRATION

Internet administration of a questionnaire of 18 questions on:

- #1 Customer service quality of service
- #2 The impact of customer services on loyalty
- #3 The level of trust in customer services
- #4 The level of trust in customer services
- #5 The level of trust in customer services



TARGET

Sample of **5 006** people representative of the population aged 18 and over, users or not of customer service

-  1 000 surveys
-  1 002 surveys
-  1 001 surveys
-  1 001 surveys
-  1 002 surveys



DIARY

from 19 to 29 August 2024



ANALYSIS

Adjustment of surveys on socio-demographic criteria gender, age, professional activity as well as place of residence.

01

USE OF CONTACT CHANNELS

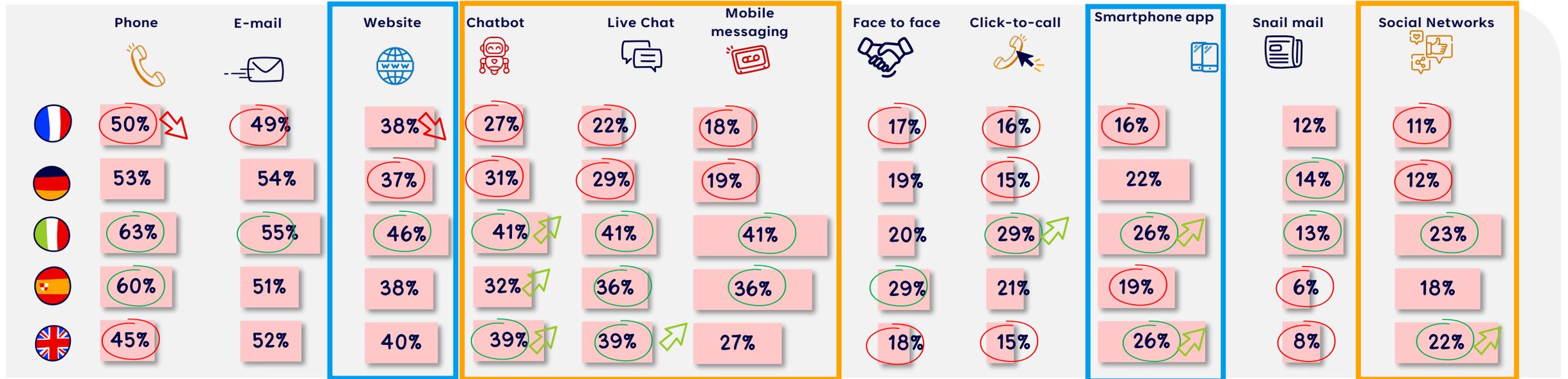
Italians and Spanish use customer services more than other countries

Customer Service Contact Channels - PAST 12 MONTHS

Q1. In the past 12 months, did you contact a customer relationship department, regardless of the business area concerned? (Base : 5 006 resp.)

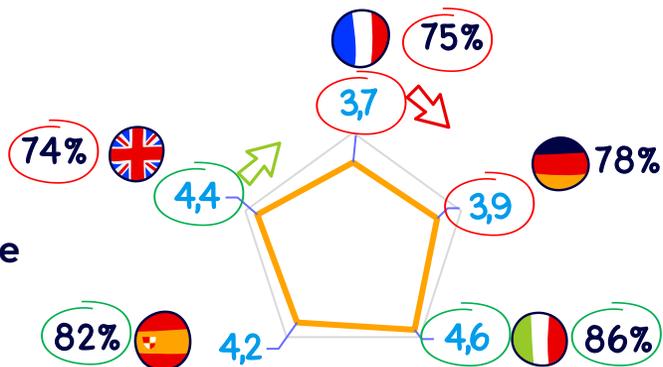
Evolution vs 2023

Web interface channels
Online conversation channels



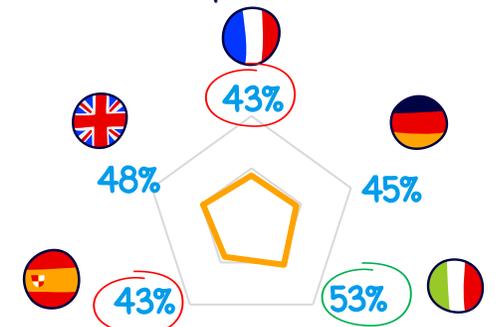
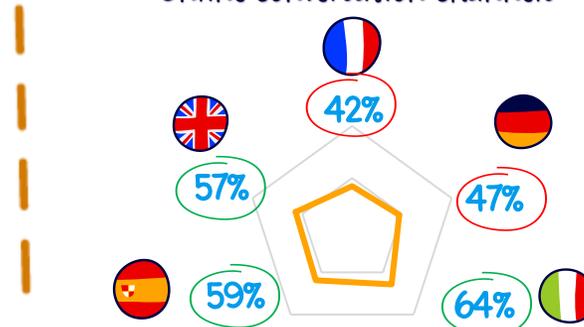
Average number of channels used

% of customer service usage



Online conversation channels

Web interface channels



02

CUSTOMER SERVICE SATISFACTION

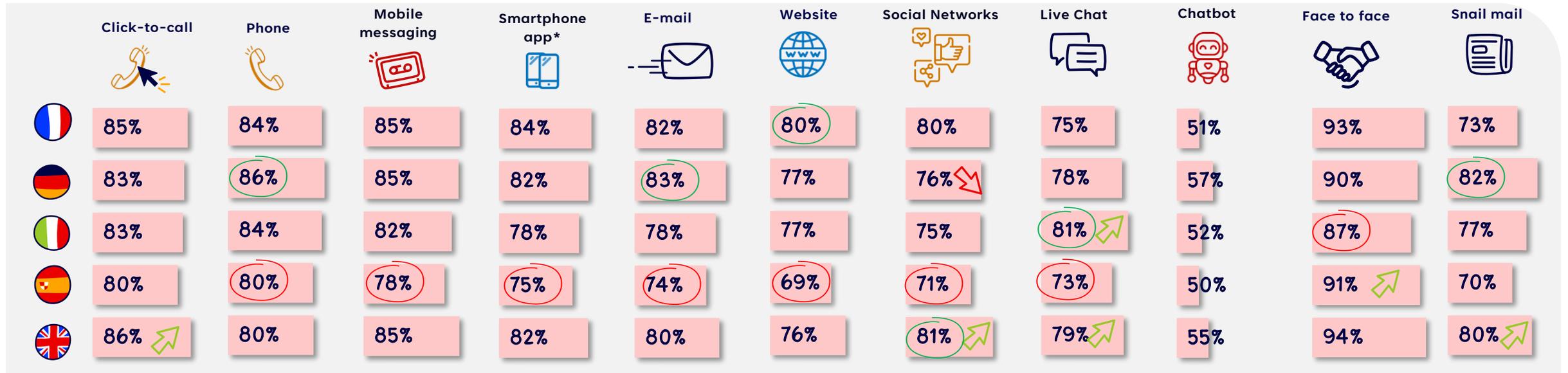
The French and Germans are more satisfied than other countries

Satisfaction with customer services

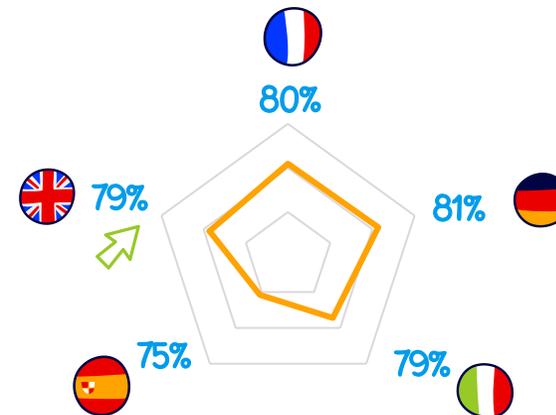
Q3. Overall in the past 12 months, would you say that the quality of your customer relationship has been definitely satisfactory, rather satisfactory, rather not satisfactory, or not satisfactory at all? (Base : 2 720 resp.)



Evolution vs 2023



OVERALL SATISFACTION



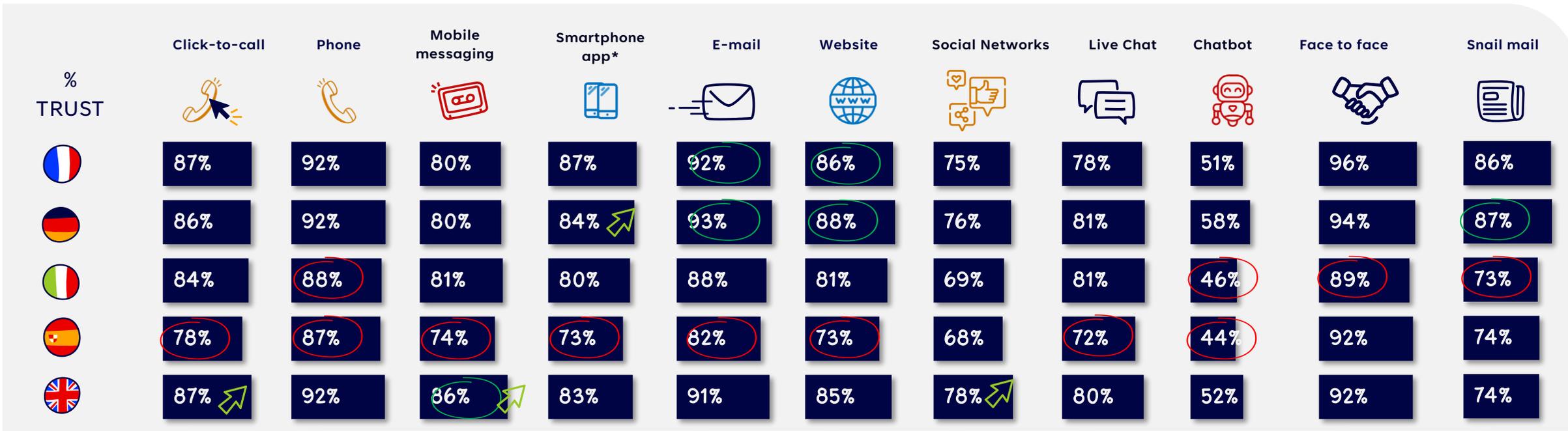
A lack of confidence among Spanish and Italians

Level of confidence in the channels used

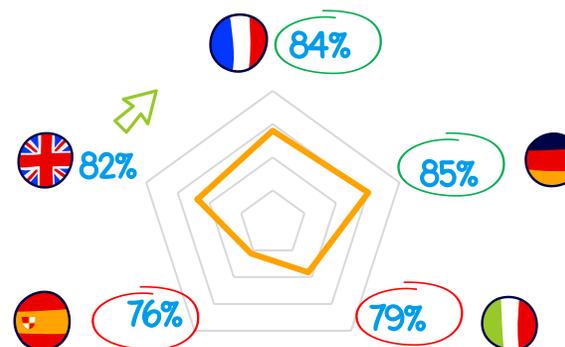
[2023] Q4. To what extent do you trust the channels you have used? (Base : 2 720 resp.)



Evolution vs 2023



OVERALL TRUST



04

THE IMPACT OF CUSTOMER SERVICES ON BRAND IMAGE

A major impact on customer service throughout Europe

The impact on brands

Q8. Here is a list of characteristics relative to the quality of the customer relationship. For each one, do you totally agree, agree, disagree, or strongly disagree? (Base : 5 006 resp.)



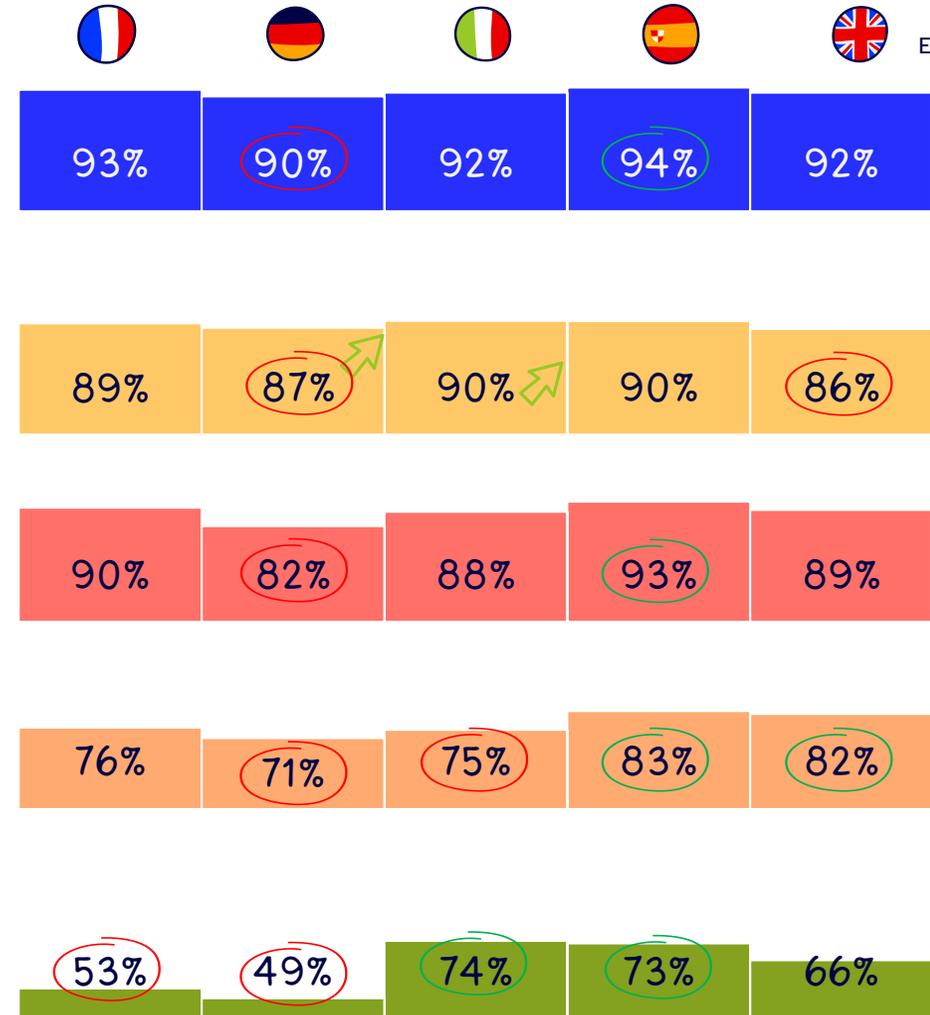
The quality of a company's customer relationship influences the overall image you have of it.

If you are disappointed with the quality of the customer relationship, you can change your mind and not purchase or interrupt your subscription.

The quality of the customer relationship influences your decision to purchase or re-purchase.

In case a customer service department offers a good experience, you are willing to spend more or to be more loyal.

You have a better image of companies that offer new means of contact such as social media, instant messaging, etc.



A much more positive perception of the efforts made for remote applications than for face-to-face applications

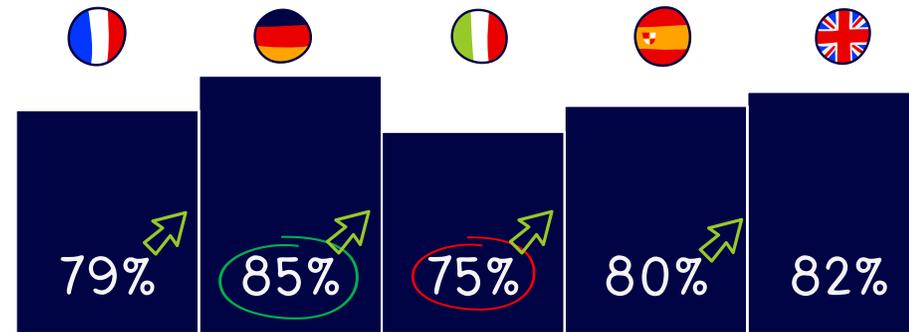
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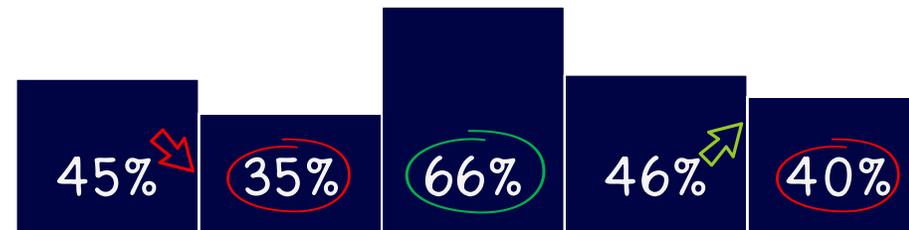


Evolution vs 2023

Companies are making more and more effort to respond to your requests remotely (telephone, e-mail, chat, website, etc.)



Companies are making more and more effort to respond to your face-to-face requests (branch, shop, counter, etc...).



07

USE OF MEDIATION

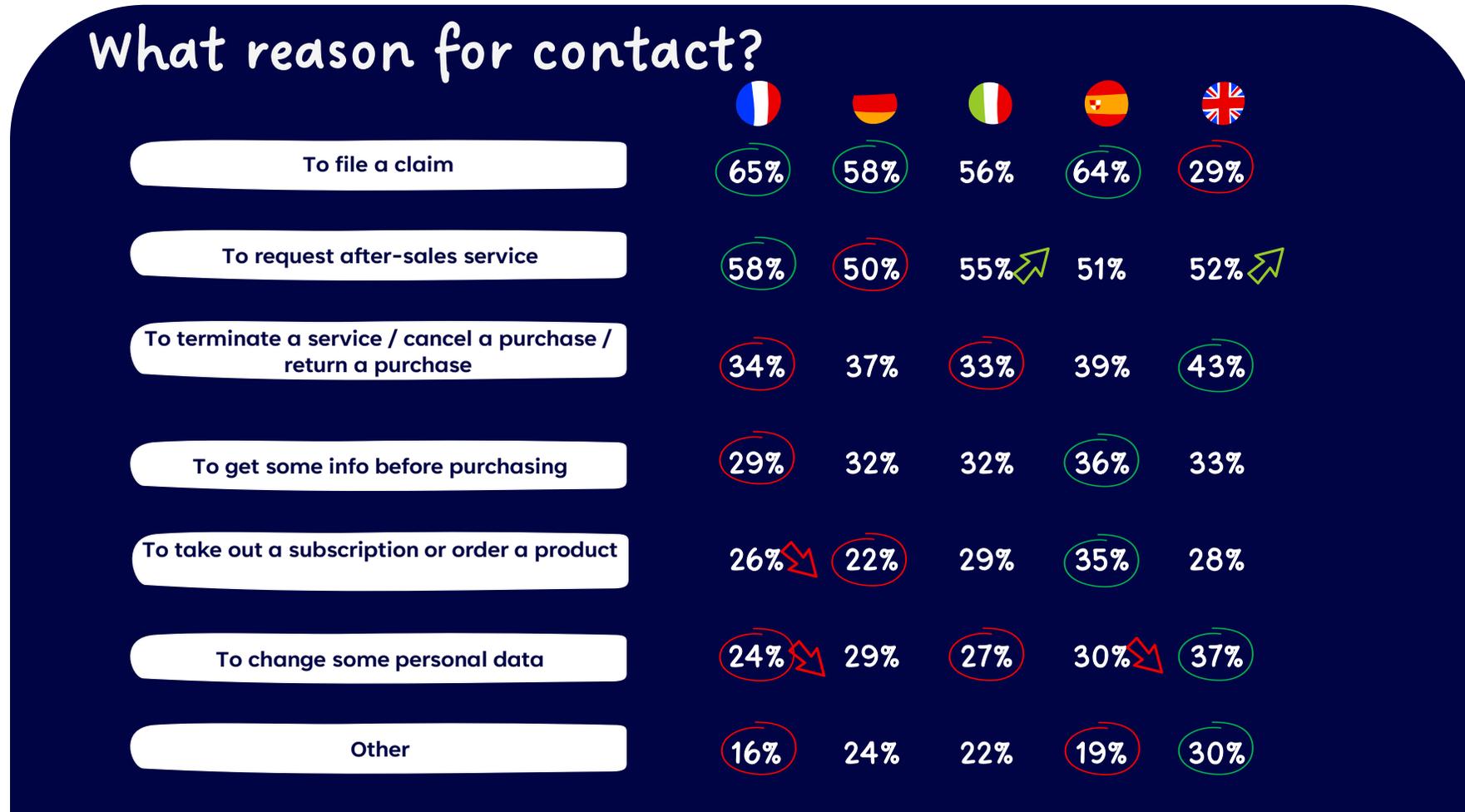
The main reasons for contact are complaints and after-sales service, whatever the country

Reason for contacting customer service

Q5. In the past 12 months, have you contacted a customer service department, regardless of channel and sector? (Base totale : 3 973 resp.)



Evolution vs 2023



The Spanish and British make greater use of third parties to manage unresolved requests

Recourse in the event of an unresolved request

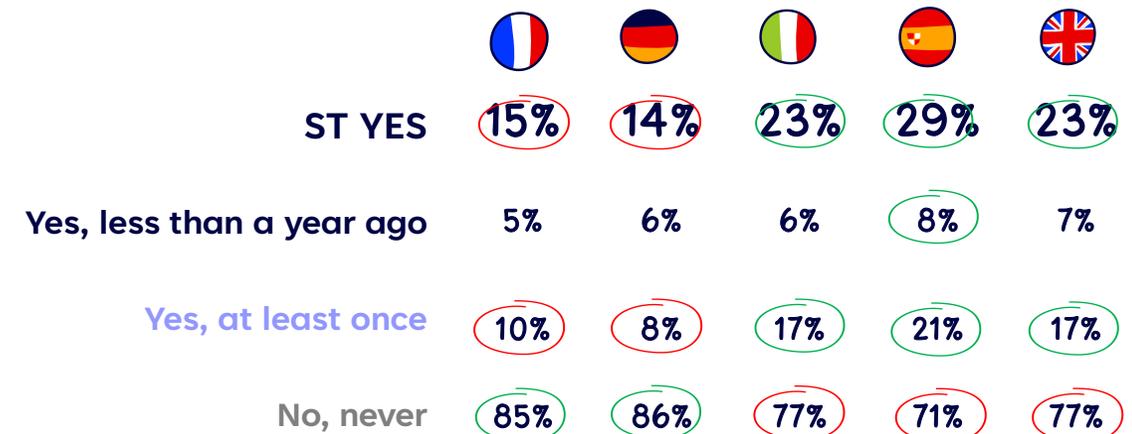
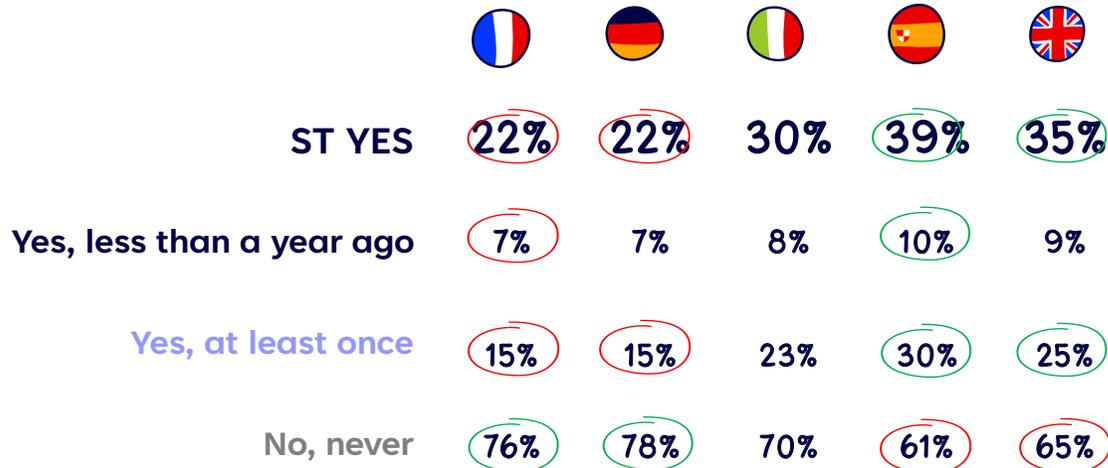


[2024] Q1. Have you ever turned to a consumer association following an unresolved request with customer service? (Base : 5 006 resp.)
 [2024] Q2. Have you turned to a mediator following an unresolved request with customer service? (Base 5 006 resp.)



Appealed to **a consumer association** following an unresolved query with a customer service department?

Contacted **a mediator** following an unresolved query with a customer service department?



Less effective recourse in France

Sectors of activity for which you have contacted a mediator or consumer association

[2024] Q3. What are the sectors of activity for which you turned to a mediator or consumer association over the past year? (Base : 510 resp.)

[2024] Q4. At the end of the appeal would you say that... (Base : 510 resp.)



Sectors of activity concerned by a call to a mediator or a consumer association

					
A telephone operator	48%	45%	59%	37%	51%
An energy supplier	44%	48%	52%	31%	57%
A retailer	43%	46%	48%	34%	56%
An e-commerce player	42%	37%	50%	37%	36%
An insurance company	46%	43%	35%	34%	42%
A transport operator	37%	49%	44%	28%	42%
A banking industry player	40%	29%	40%	40%	45%
A public sector player	39%	41%	49%	27%	40%
A tourist industry player	27%	39%	45%	30%	40%
A car dealership	35%	32%	44%	25%	36%
Other	28%	36%	23%	20%	26%

Situation at the end of the appeal

					
The consumer association or mediator helped you resolve the situation	41%	54%	56%	49%	49%
The situation is still being addressed	41%	32%	35%	33%	38%
The call to the mediator or association was unsuccessful	12%	6%	6%	12%	8%
Other situation	7%	9%	3%	6%	6%

07

IA AND CUSTOMER SERVICE REGULATION

The least use of AI in France, even though it is the countries with the highest knowledge

Generative Artificial Intelligence

[2023] Q12. Have you already heard of generative Artificial Intelligence tools, such as ChatGPT ? (Base : 5 006 resp.)

[2023] Q12b. Have you ever used generative Artificial Intelligence tools, such as ChatGPT? (Base 3 856 resp.)

[2023] Q13. Among the possible uses of generative Artificial Intelligence in remote customer services, can you rank the following initiatives from most useful to least useful? (Base : 5 006 resp.)



Evolution vs 2023



Have already heard of AI tools

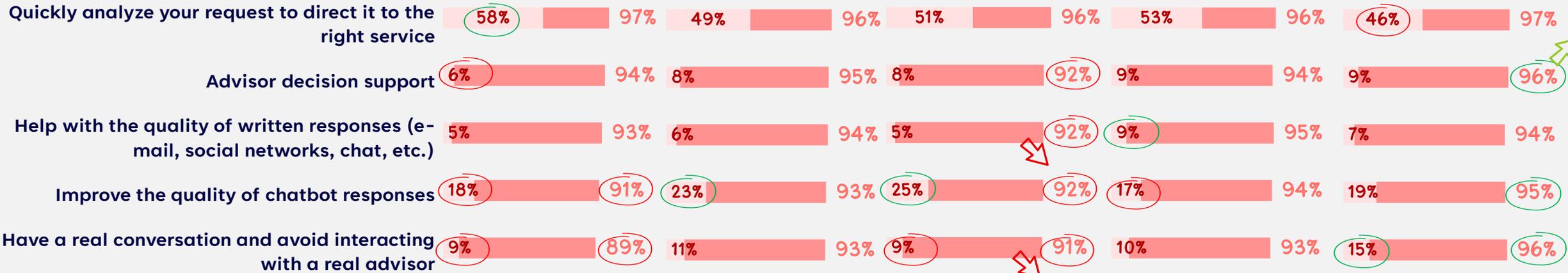


have already used it



1st quote

Total quote



A greater willingness among Germans to use AI in customer services

Generative Artificial Intelligence in the future

[2024] Q11. Do you think that in 5 to 10 years customer services will be partially managed by Generative Artificial Intelligence? (Base : 5 006 resp.)

[2024] Q12. Would you like customer services to make more use of Generative Artificial Intelligence to recognize you, qualify your request, answer you more quickly, etc.? (Base 5 006 resp.)



Think that customer services will be partially managed by Generative Artificial Intelligence

					
ST YES	89%	90%	88%	92%	90%
Yes, in less than 5 years	46%	50%	53%	58%	53%
Yes, in 5 to 10 years	43%	40%	35%	33%	37%
No, never	11%	10%	12%	8%	10%

Would like customer services to make more use of Generative Artificial Intelligence

					
ST YES	33%	59%	47%	46%	48%
Yes, in less than 5 years	15%	31%	25%	28%	27%
Yes, in 5 to 10 years	18%	28%	22%	18%	21%
No, never	67%	41%	53%	54%	52%

Germans less attached to regulation than other countries

Regulation of Artificial Intelligence

[2024] Q13. Do you think that Generative Artificial Intelligence used by customer services should be subject to specific State regulations? (Base : 5 006 resp.)

[2024] Q14 What do you think are the challenges of regulating the use of AI in customer services? (Base 3 601 resp.)

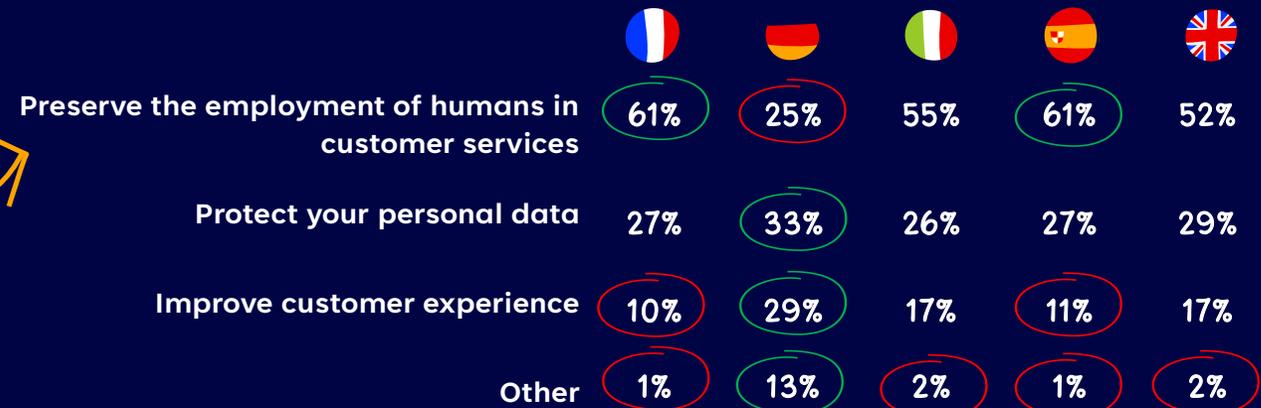


Regulation of AI



Think that Generative AI used by customer services should be subject to specific government regulation

What is at stake in regulating the use of AI?



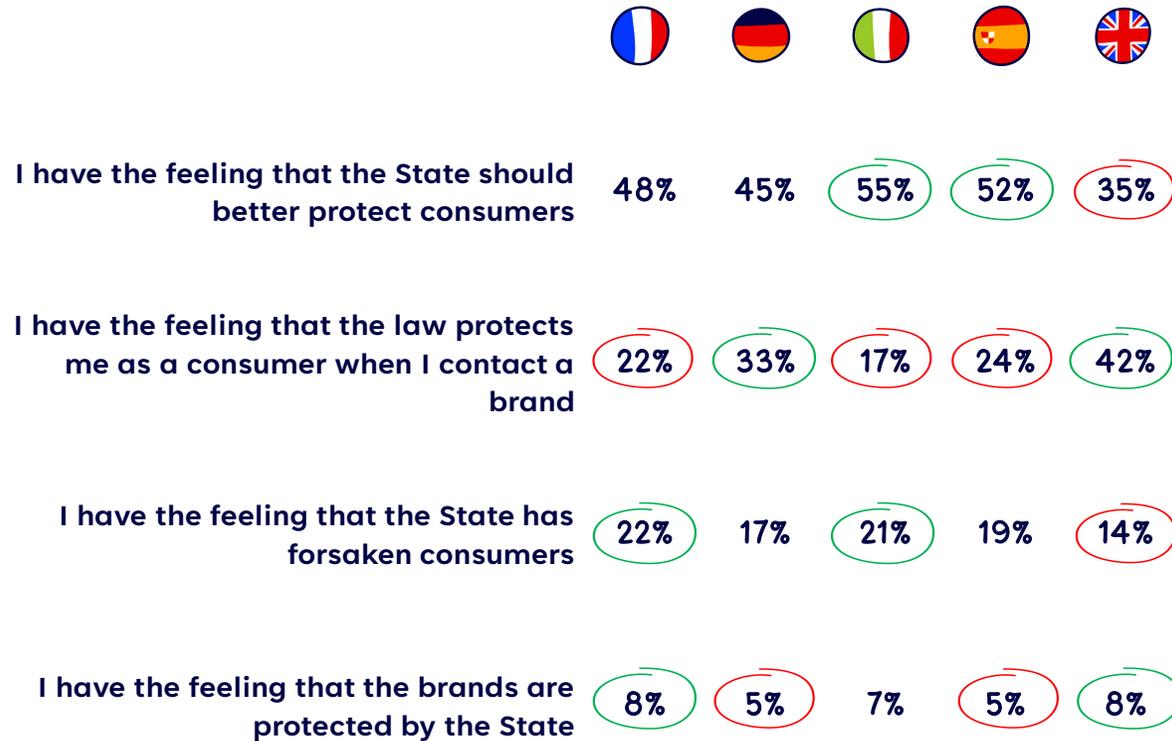
Expectations of state protection in relations between brands and consumers

State supervision of consumer protection

[2024] Q5. Now let's talk about government supervision of consumer protection. Which of the following statements best describes your state of mind? (Base : 5 006 resp.)



What role does the state play in consumer protection?

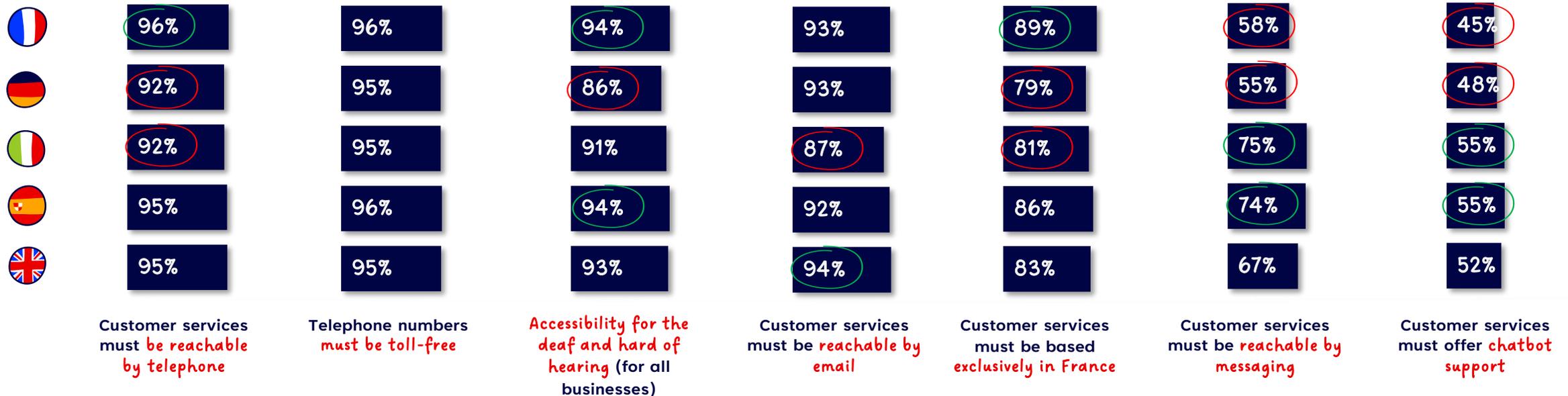


A greater desire to be able to contact a customer service by chat and messaging in Spain and Italy.

Priority for implementing state measures

[2024] Q10. Among the following regulatory measures, which ones should be implemented as a priority by the State to improve the accessibility and quality of customer services? (Base : 5 006 resp.)

ST
Priority



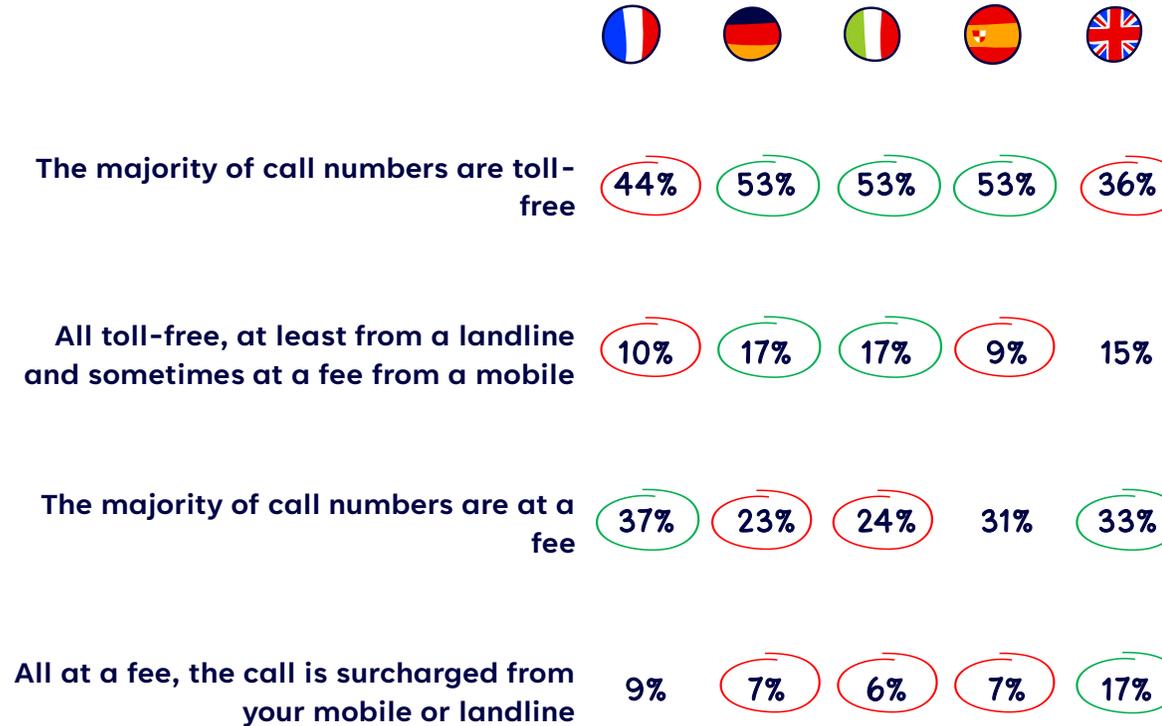
A large proportion of Europeans agree that the majority of customer service call numbers should be free of charge

The image of customer services

[2024] Q6. In your opinion, telephone customer services are... (Base : 1 000 resp.)



Telephone customer services are...



07

ACCESSIBILITY OF CUSTOMER SERVICES

Longer response times for the Spanish and the British

Feelings about customer services

[2024] Q7. Here are a number of statements about customer services. Do you totally agree, somewhat agree, somewhat disagree or totally disagree with the following statements? (Base : 5 006 resp.)

ST
Agree



In the UK, a higher drop-out rate due to the feeling of never having a suitable response

Reasons for not contacting customer service

[2024] Q8. Have you ever given up on contacting customer service? (Base : 5 006 resp.)
 [2024] Q9. Why have you given up on contacting customer service? (Base : 5 006 resp.)



Have given up contacting customer service (%yes)

 51%

 54%

 52%

 50%

 64%

What's the reason for this?

					
Reaching them is too complicated	65%	51%	45%	52%	50%
You cannot contact them by phone	48%	42%	39%	46%	47%
The phone call is at a fee	38%	27%	25%	35%	23%
You cannot contact them by email/via an internet form	28%	27%	18%	25%	27%
You cannot contact them via a chatbot	11%	16%	17%	21%	20%
You cannot contact them via social media	9%	9%	11%	11%	15%
You can never get an answer	32%	20%	40%	41%	55%



bva
Xsight

You will
understand.

