



CUSTOMER SERVICES OBSERVATORY 2020



WHICH METHODOLOGICAL DEVICE ?



ADMINISTRATION

A SURVEY OF 18 QUESTIONS
ADMINISTRED ONLINE ON:

1. THE QUALITY OF THE CUSTOMER SERVICE
2. THE IMPACT OF CUSTOMER SERVICES ON LOYALTY
3. THE DRIVERS OF EMOTION IN CUSTOMER RELATIONSHIP



TARGET

A SAMPLE OF 5000

INDIVIDUALS REPRESENTATIVE
OF THE POPULATION AGED 18
AND OVER, USERS OR NOT OF A
CUSTOMER SERVICE.

-  1000 surveys
-  1000 surveys
-  1000 surveys
-  1000 surveys
-  1000 surveys



CALENDAR

FROM 24 AUGUST TO
2 SEPTEMBER 2020



ANALYSIS

REDRESSING OF SURVEYS ON
SOCIO-DEMOGRAGRAPHIC
CRITERIA OF
GENDER, AGE, PROFESSIONAL
ACTIVITY AND PLACE OF RESIDENCE.

DETAILED RESULTS

Bva

DIVERSIFICATION IN CONTACT CHANNELS WITH CUSTOMER SERVICES

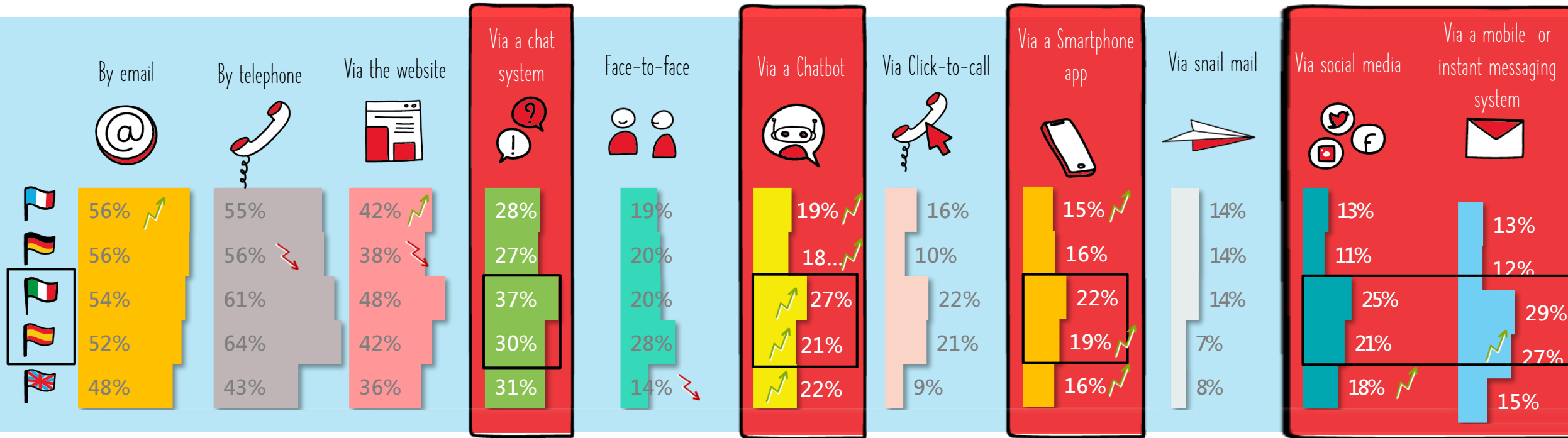
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THE CHATBOT AND THE APPS ARE ON THE RISE IN ALL EUROPEAN COUNTRIES

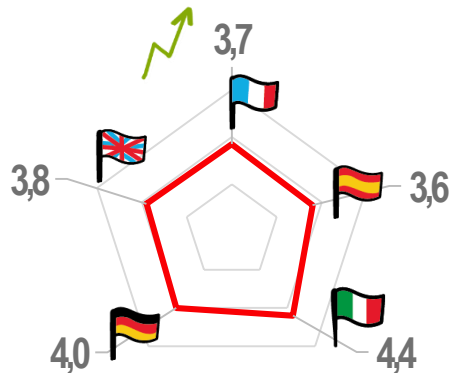
CUSTOMER SERVICE CONTACT CHANNELS - PAST 12 MONTHS

Q1. In the past 12 months, did you contact a customer relationship department, regardless of the business area concerned? (Base : 5 000 resp.)

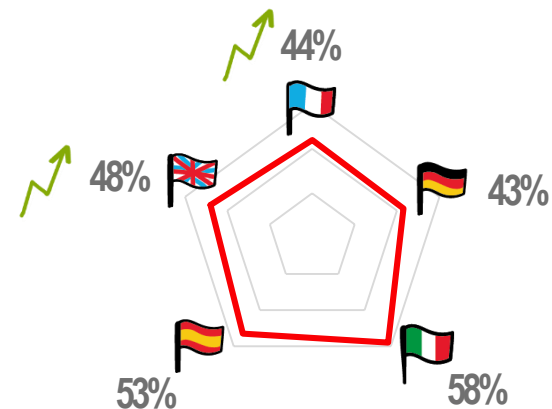
Evolution vs 2019



AVERAGE NUMBER OF USED CHANNELS



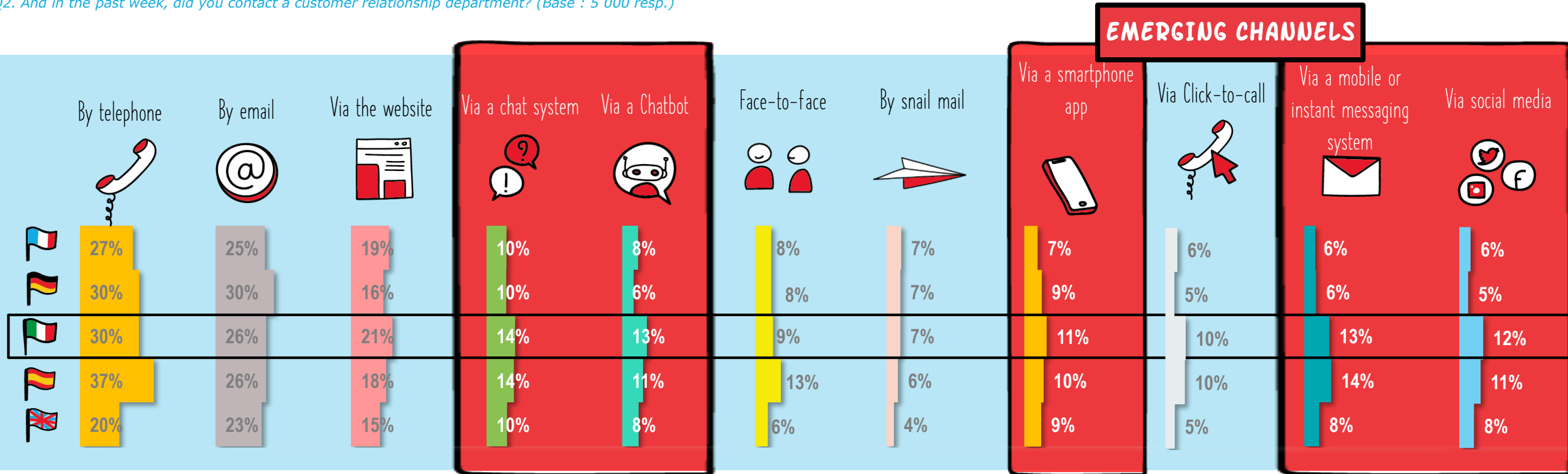
% EMERGING CHANNELS



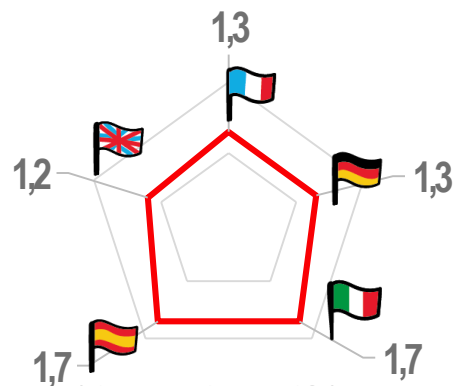
MORE FREQUENT USE OF EMERGING CHANNELS FOR SPANISH AND ITALIANS IN THE PAST WEEK

CUSTOMER SERVICE CONTACT CHANNELS - PAST WEEK

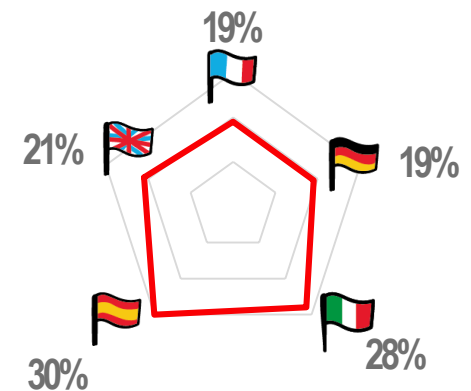
Q2. And in the past week, did you contact a customer relationship department? (Base : 5 000 resp.)



AVERAGE NUMBER OF USED CHANNELS



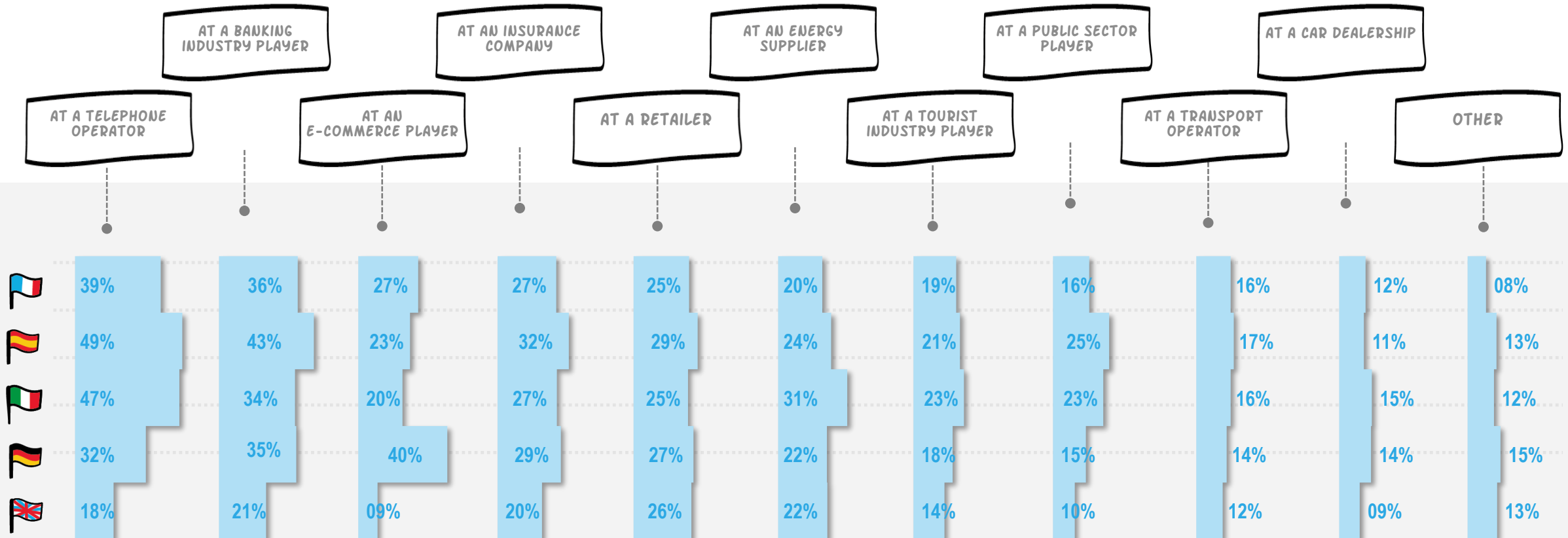
% EMERGING CHANNELS



FRENCH PEOPLE USUALLY CONTACT THEIR TELEPHONE OPERATOR OR THEIR BANK WHILE E-COMMERCE PLAYERS ARE MORE REQUESTED IN GERMANY

WHICH BUSINESS SECTOR?

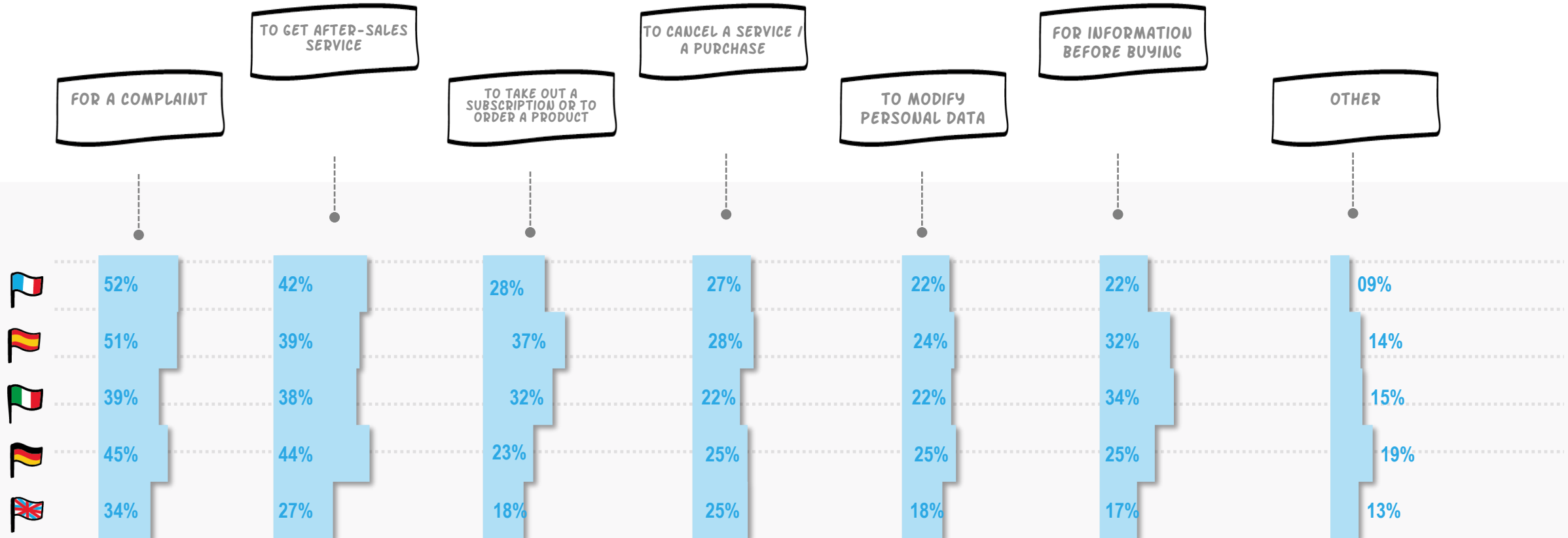
Q4. In the past 12 months, did you contact a customer relationship department, regardless of the channel? (Base : 5 000 resp.)



A HIGH CONCENTRATION OF REQUESTS TO CUSTOMER SERVICES FOR COMPLAINTS OR AFTER-SALES SERVICE

REASON TO CONTACT A CUSTOMER RELATIONSHIP DEPARTMENT

Q5. In the past 12 months, did you contact a customer relationship department, regardless of channel and sector? (Base : 5 000 resp.)



**LESS EFFICIENT CUSTOMER
SERVICES IN 2020**

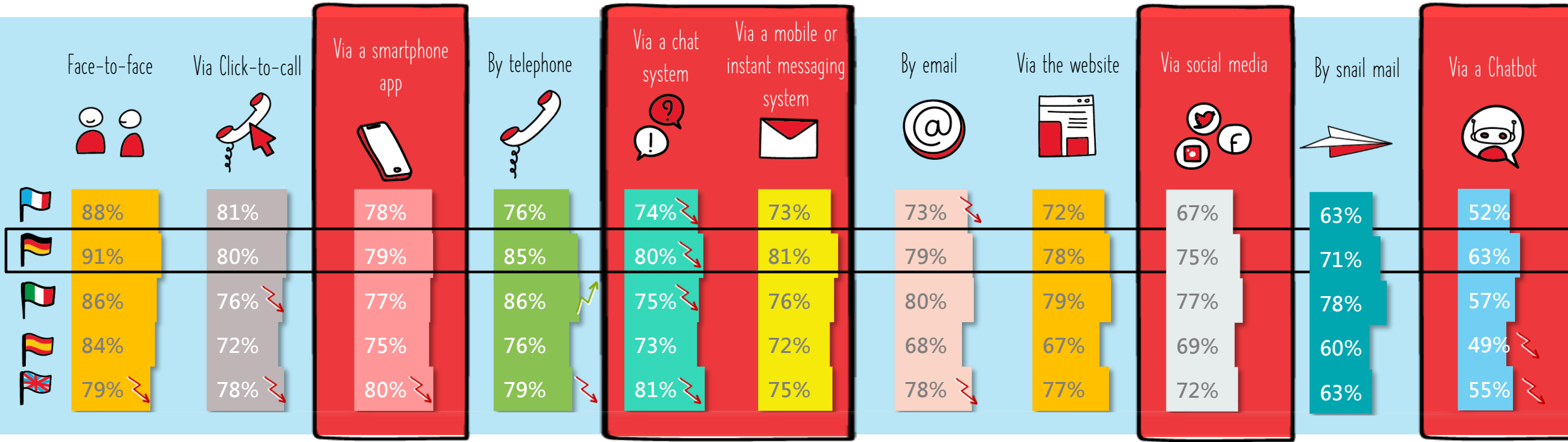
Bva

THE CHAT SYSTEM: A MORE SEVERELY JUDGED CHANNEL (VS. 2019) IN ALL COUNTRIES

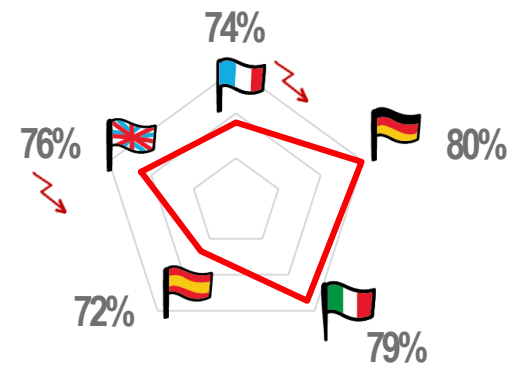
SATISFACTION TOWARDS CUSTOMER SERVICES

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 : 1 000 resp.)

EMERGING CHANNELS



% GLOBAL SATISFACTION



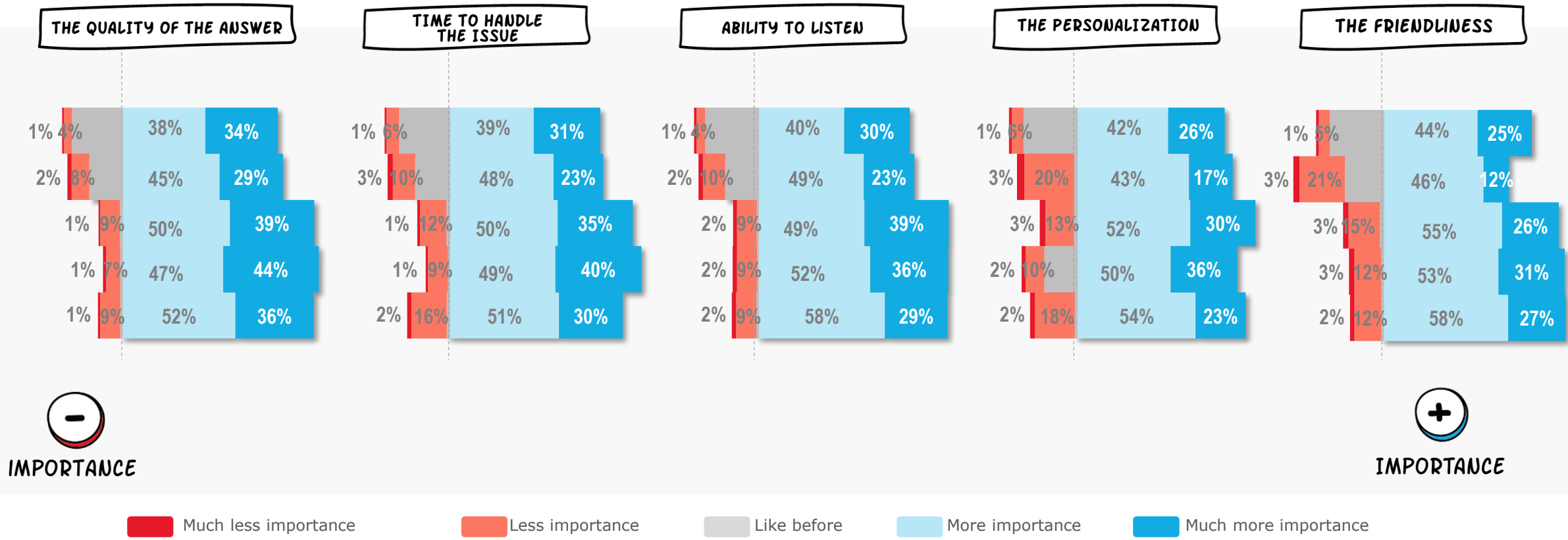
Evolution vs 2019



IDENTICAL EXPECTATIONS ON THE BASICS OF CUSTOMER RELATIONSHIP IN ALL COUNTRIES : THE QUALITY OF THE ANSWER, TIME TO HANDLE THE ISSUE...

THE MOST IMPORTANT IN A CUSTOMER RELATIONSHIP...

Q12. In the current context, do you consider that you attach more importance or less importance than before to...? (Base : 5 000 resp.)



IMPORANCE

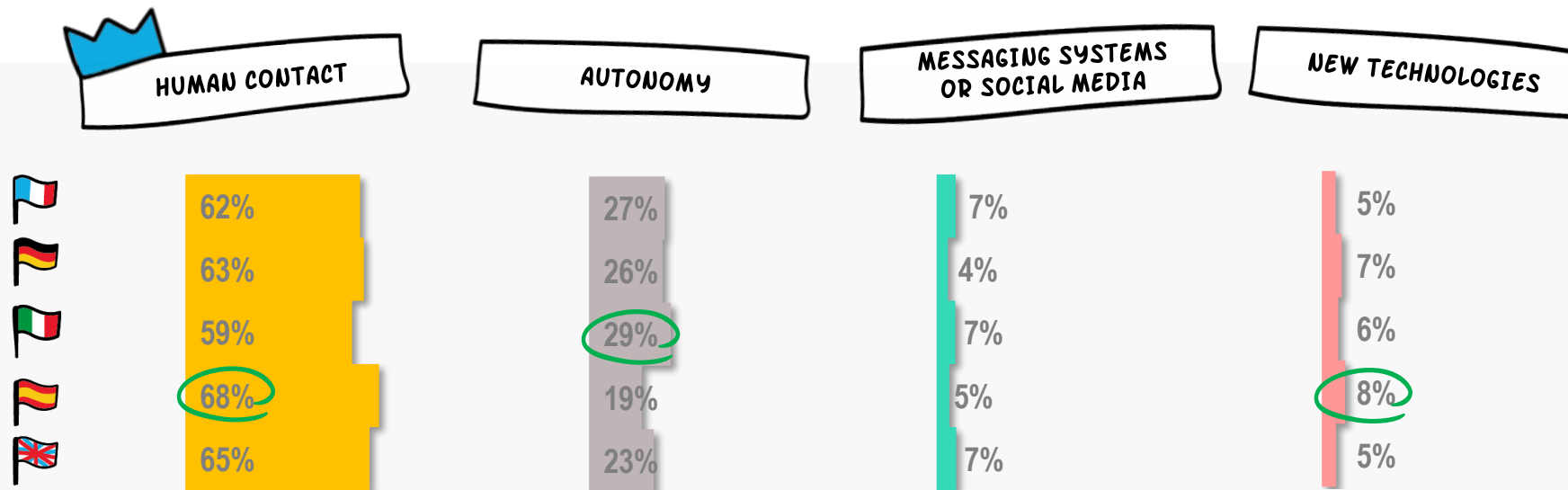
IMPORANCE



HUMAN CONTACT IS FAVOURED FOR EXCHANGES WITH CUSTOMER SERVICE DEPARTMENTS IN ALL EUROPEAN COUNTRIES

WHAT PRIVILEGED RELATIONSHIPS WITH CUSTOMER SERVICE ?

Q13. In the current context, what type of relationship do you favour for your exchanges with customer service departments? (Base : 5 000 resp.)



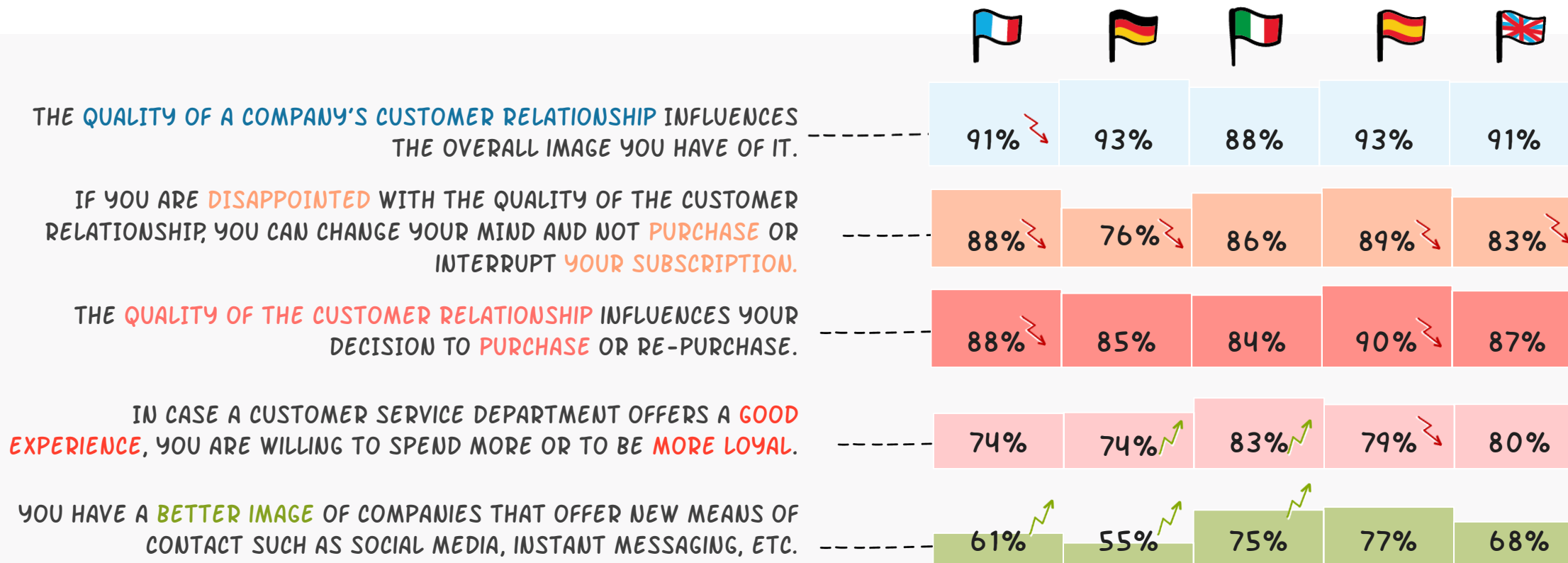
**THE DRIVERS OF
EMOTION IN CUSTOMER
RELATIONSHIP**



NEW MEANS OF CONTACT EXPECTED IN ALL COUNTRIES

IMPACT ON BRANDS

Q8. Here is a list of characteristics relative to the quality of the customer relationship. For each one, do you strongly agree, agree, disagree, or strongly disagree? (Base : 5 000 resp.)



GERMANY IS THE ONLY COUNTRY THAT MANAGES TO GENERATE DELIGHT IN THE CUSTOMER RELATIONSHIP

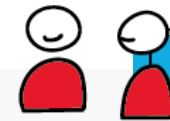
DELIGHT OR DISAPPOINTMENT

Q9. Overall, is the quality of the REMOTE CUSTOMER RELATIONSHIP with the brands... (Base : 5 000 resp.)

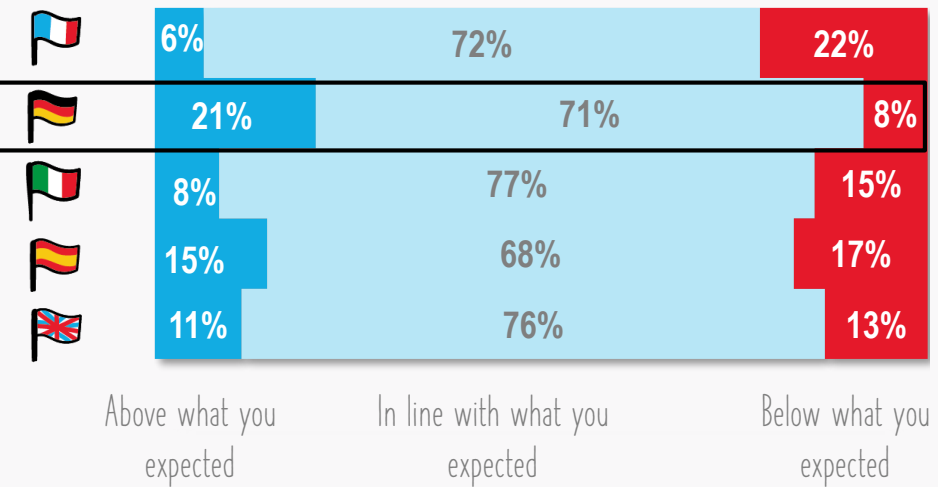
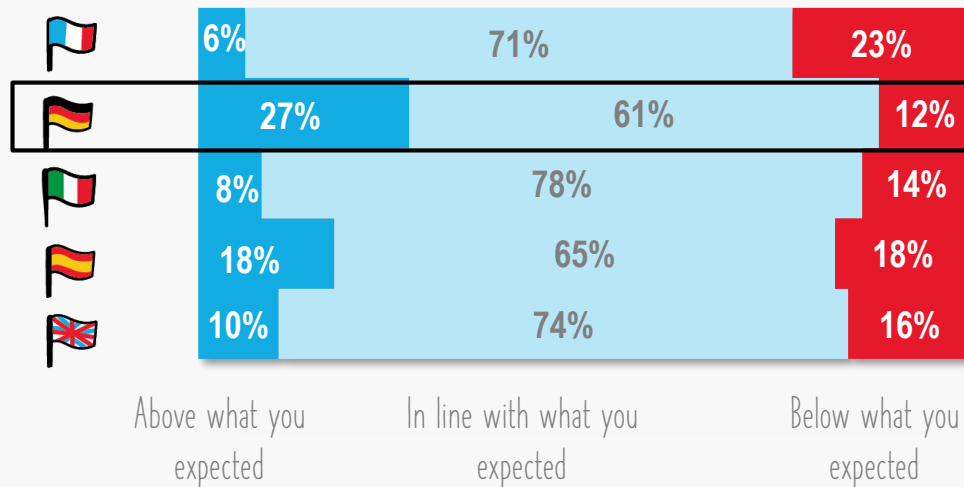
Q10. Overall, is the quality OF THE FACE TO FACE CUSTOMER RELATIONSHIP with the brands... (Base : 5 000 resp.)



THE REMOTE CUSTOMER RELATIONSHIP



THE FACE-TO-FACE CUSTOMER RELATIONSHIP



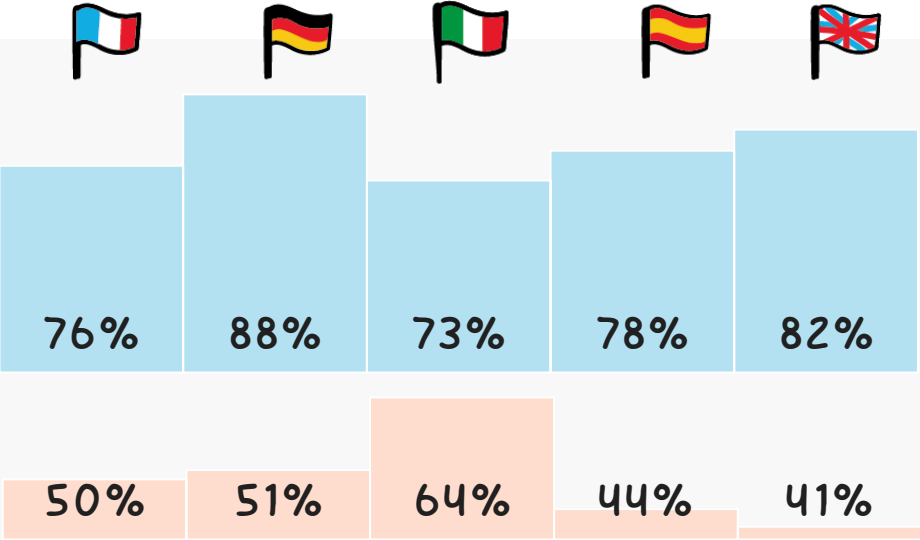
GREATER EFFORTS TO RESPOND TO REMOTE REQUESTS IN GERMANY AND THE UK

IMPACT ON BRANDS

Q8. Here is a list of characteristics relative to the quality of the customer relationship. For each one, do you strongly agree, agree, disagree, or strongly disagree? (Base : 5 000 resp.)

COMPANIES ARE MAKING MORE AND MORE EFFORTS TO RESPOND TO YOUR REQUESTS REMOTELY (TELEPHONE, E-MAIL, CHAT, WEBSITE, ETC) *

COMPANIES ARE MAKING MORE AND MORE EFFORTS TO RESPOND TO YOUR REQUESTS FACE-TO-FACE (BRANCH, SHOP, COUNTER, ETC) *

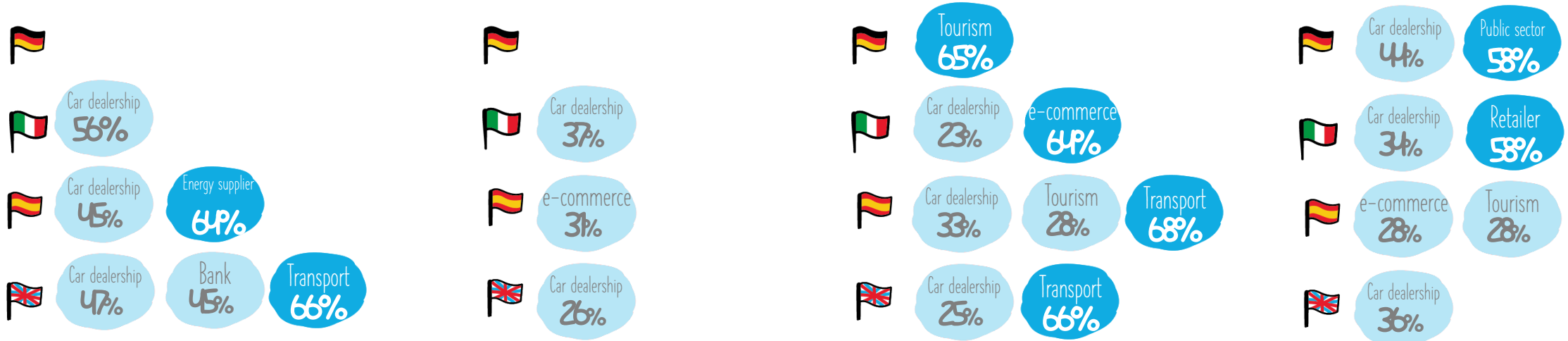
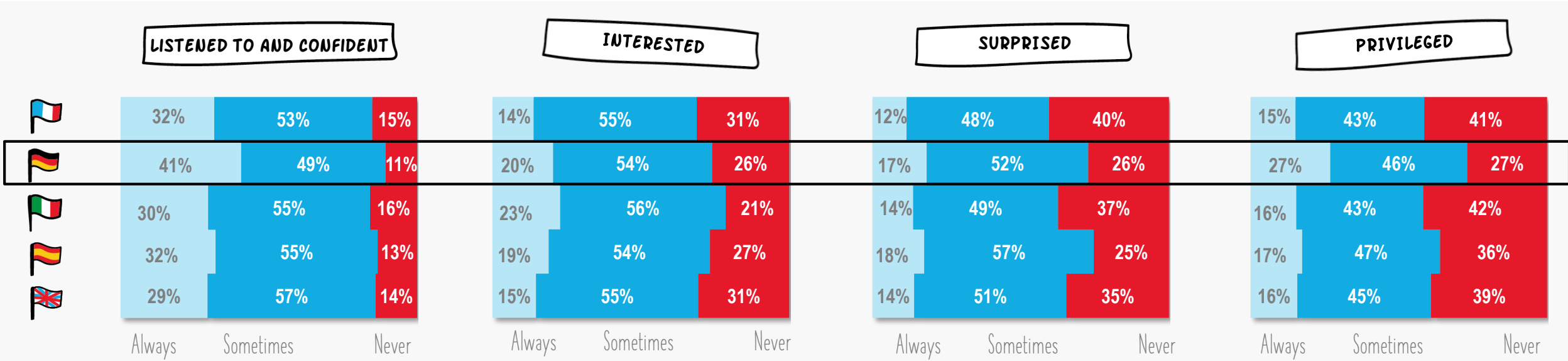


* No previous data

GERMANY IS ALSO THE COUNTRY THAT GENERATES THE MOST EMOTIONAL DRIVERS

CUSTOMER FEELINGS TOWARDS CUSTOMER DEPARTMENTS - PAST 12 MONTHS

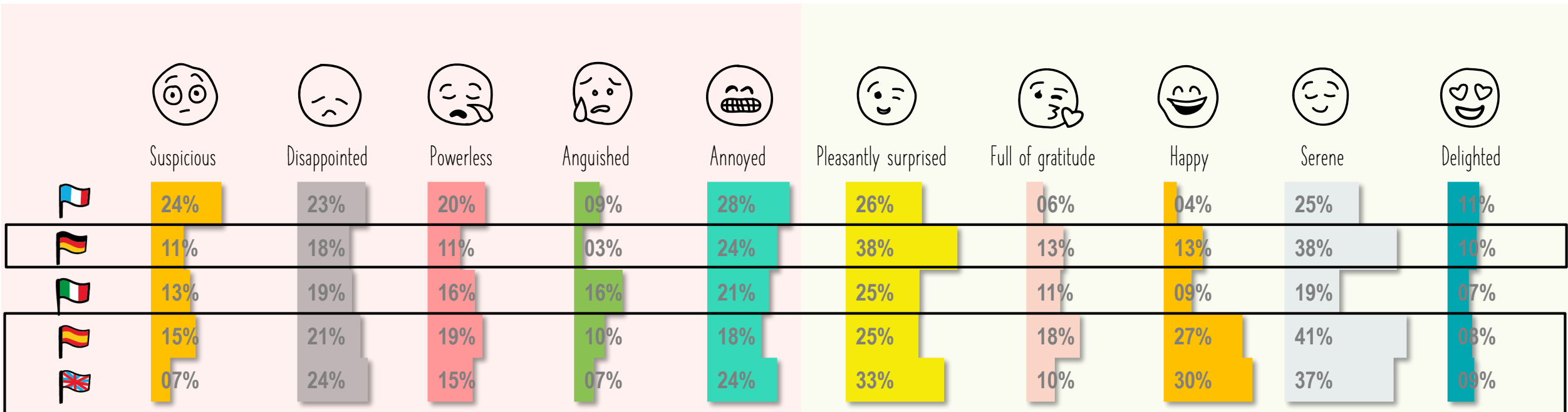
Q6. When you think of your past experiences with the customer departments in the past 12 months, how often do you have the following feelings? (Base : 3772 resp.)



GERMANS, SPANISH AND BRITISH HAVE THE MOST POSITIVE EMOTIONAL EXPERIENCES

CUSTOMER FEELINGS WHEN DEALING WITH CUSTOMER DEPARTMENTS- PAST 12 MONTHS

Q7. Overall, which term(s) best describes how you felt when dealing with customer departments in the past 12 months? (Base : 3685 resp.)



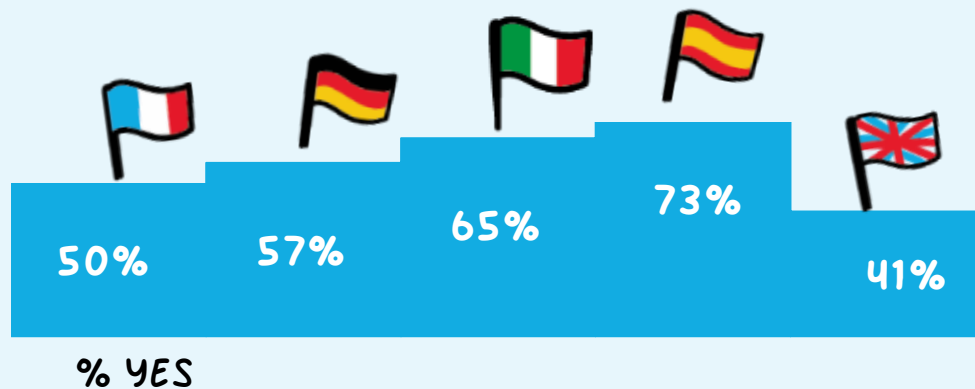
A REMOTE CUSTOMER RELATIONSHIP THAT IS GOING TO INTENSIFY FOR ALL EUROPEAN COUNTRIES

THE BEHAVIOUR TOWARDS REMOTE CUSTOMER SERVICE DEPARTMENTS IN THE FUTURE

Q14. Are you going to contact remote customer service departments more and more before you go to a shop, branch or any other business...?
(Base : 5 000 resp.)

Q15. If yes, for which request(s) (Base : 2 839 resp.)

IS GOING TO CONTACT REMOTE CUSTOMER SERVICE DEPARTMENTS MORE AND MORE BEFORE TO GO TO A SHOP



FOR WHICH REQUEST(S)?

