

# Global State of Customer Experience in EMEA 2022

Discover the latest strategies being utilised by brands in Europe, the Middle East and Africa as they attempt to optimise their CX offerings



Customer Smiles. Delivered at Scale.

# Executive Summary

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Customer expectations are changing due to innovative experiences delivered by trailblazing brands. To avoid losing their lead to more agile competitors, businesses must constantly enhance the experiences they deliver.

CX Network's [Global State of Customer Experience 2021](#) report confirmed that the vast majority of customers will switch brands if they are unsatisfied with a provider's level of service. Research by Forrester has found that more than one in four (29 percent) European businesses see CX investments as a [high or critical business priority](#). Likewise, professional services firm EY found that 76 percent of companies across the Middle East and North Africa (MENA) region plan to increase investments in technology and digital CX this year.

With the population of Europe, the Middle East and Africa (EMEA) totalling approximately [2.2 billion people](#), the region holds vast opportunities for brands. For companies to be successful, they need to customise their services and experiences according to the various cultural and linguistic preferences and practises that exist within different regions.

CX Network's [Top CX trends in Europe, the Middle East and Africa](#) report, published in September 2020, observed that to gain a competitive edge within their region, brands must master customer data to avoid having a one-size-fits-all approach to customer experience.

Based on a survey by CX Network of 135 CX practitioners, this report will explore the key CX trends, customer behaviour shifts, spend priorities and experience management pain points that are developing. Our survey respondents are located across the Europe, the Middle East and Africa region (EMEA).



“To seal the deal, show examples of where others have succeeded by improving the quality of their customer experience.”

**Perry Gale**

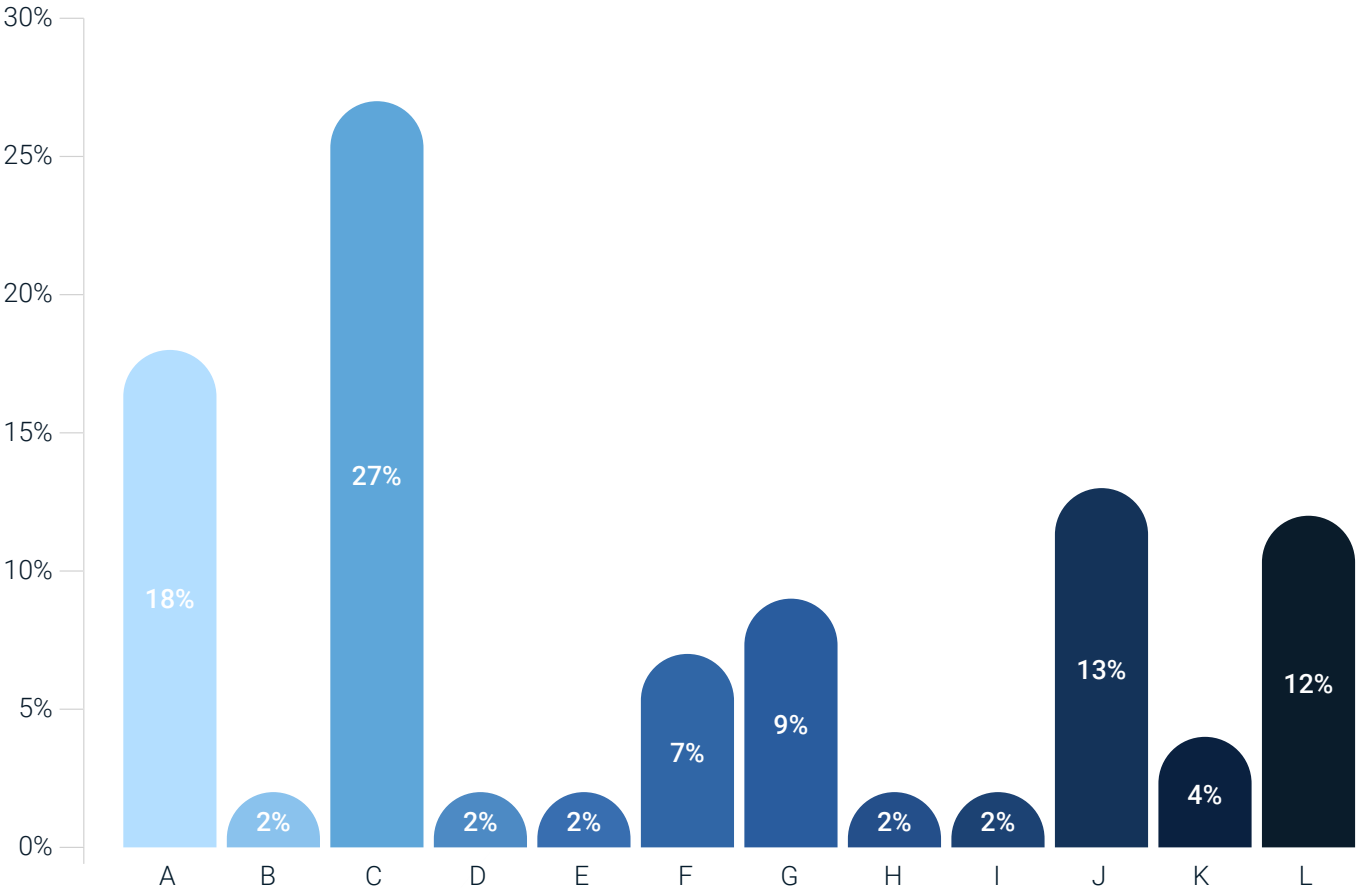
Regional Vice-President, EMEA at Cyara

# About The Respondents

CX Network's report series CX Trends in Europe, the Middle East and Africa has now entered its second year. To get a better understanding of the survey results, here is a visual breakdown of the 135 customer experience experts surveyed including their seniority, company size, industry, geography and budget.

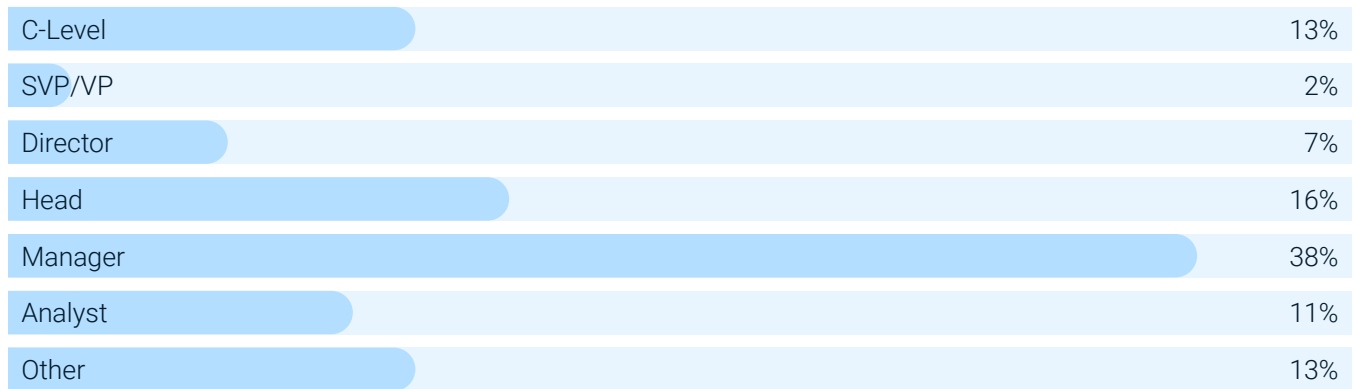
## Job Function

- A Contact Centre
- B CRM
- C Customer Experience
- D Customer Insight
- E Customer Service
- F Digital Customer Experience
- G Executive Team
- H IT
- I Market Research
- J Marketing
- K Operations
- L Other

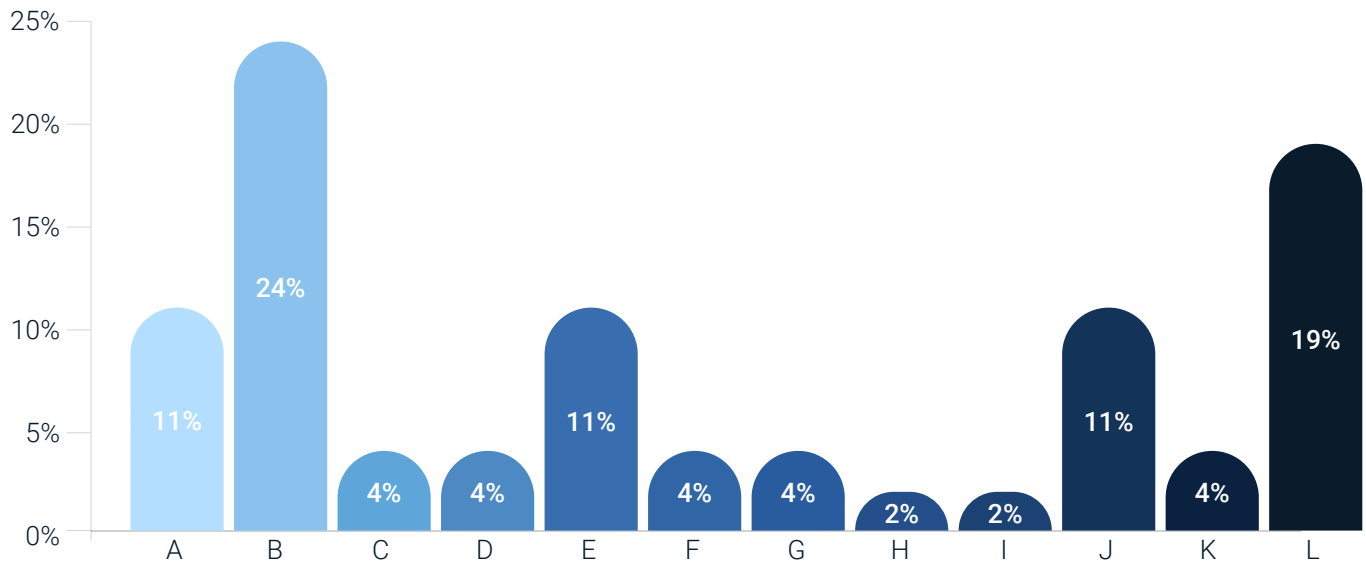


Source: CX Network

## Job Title



## Industry



## Role in CX Investment Decision-making

**4%**

I am responsible for investment decisions

**56%**

I am part of the decision-making team

**24%**

My direct manager is responsible for decision making

**16%**

I have no influence over investments

Source: CX Network

# Understanding Customer Behaviour Shifts

Here we explore the customer behaviour shifts seen by EMEA practitioners over the past year.

The pressure on brands to be socially responsible is evidently on the rise, with three in four (75 percent) respondents agreeing that buying decisions are influenced by a company's ethics and transparency. Forbes has found that more than 75 percent of consumers are more willing to buy a product from a company with [a corporate social responsibility \(CSR\) initiative](#).

Joshua Tye, senior customer operations leader at mobile payment service Cash App, explains:

**“A socially responsible organisation empathetically evaluates customers’ decisions. The most responsible teams leverage diversity and environmentalist perspectives to elevate consumer outcomes.”**

It is also clear from the results that convenience is a priority for customers, with 71 percent of respondents stating customers “crave” self-service channels. A total of 85 percent agree or strongly agree that customers are happy to spend more financially to receive a more convenient service.

Perry Gale, regional vice-president, EMEA at Cyara, suggests this draw to self-service channels is due to the modern-day customer's desire for autonomy. They are given more power, choice and convenience to seek and find answers on their own should they so choose.

Saki Takeda, director of product management at Netflix, says that when providing self-service channels, companies should ensure there is a rail guard when



a particular customer reaches out. This helps avoid different systems delivering conflicting communications or services to customers.

While customers will pay more for convenience, this is not at the cost of a bad experience explains Muss Haq, strategic insights manager for retail and commercial bank TSB.

“Customer-perceived value encompasses a combination of four factors: the trust in the brand to maintain quality of service; the ease of transacting; the promise of resolving an issue quickly if delivery of service did not meet brand promise; and removing any inconvenience and uncertainty of engagement,” he explains.

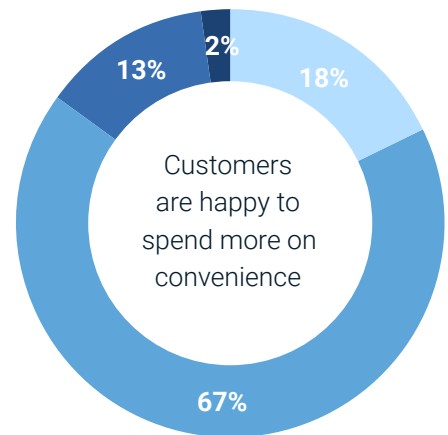
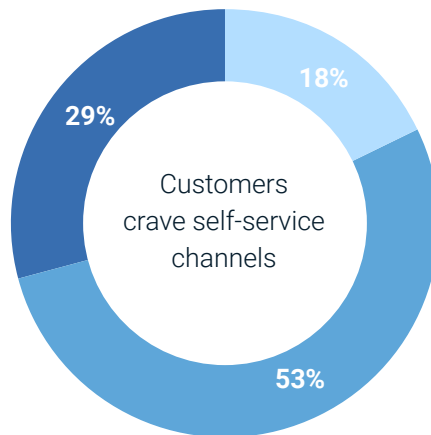
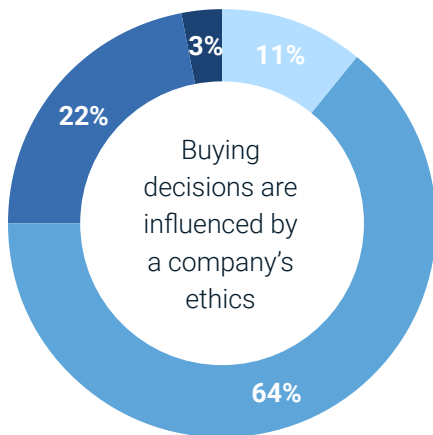
Therefore, brands should ensure that they quickly address any pain points their customers may feel, to avoid alienating them and causing churn.

The next section of the report looks at the top trends seen in customer experience in EMEA. It highlights the top trends across the region and shares tips for tapping into them.



## Looking at how trends in customer behaviours are progressing, would you agree:

● Strongly Agree ● Agree ● Unsure ● Disagree



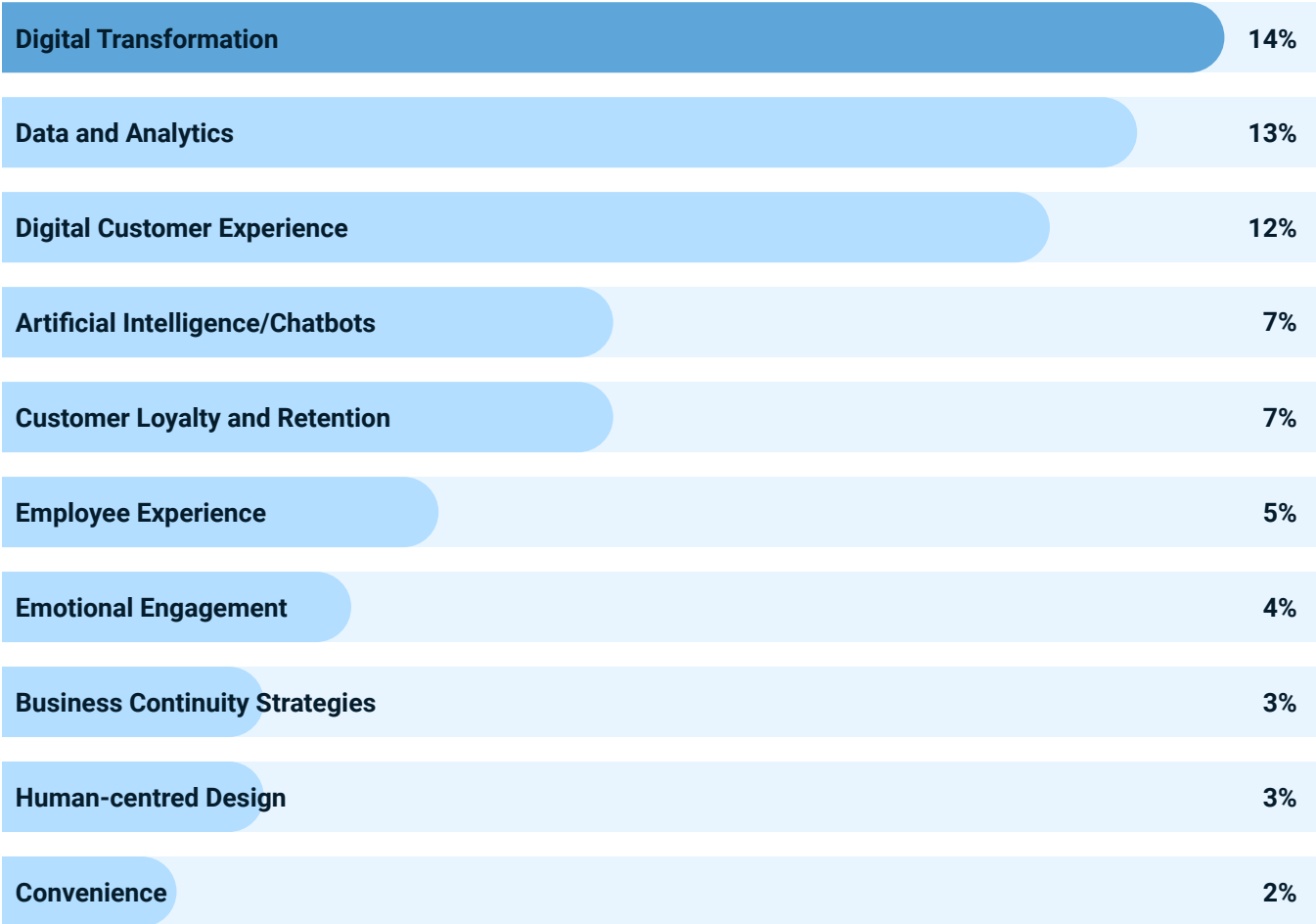
Source: CX Network

# Top 10 CX Trends in EMEA

This section of the report looks into the top three CX trends in EMEA: digital transformation, data and analytics, and digital customer experience.

## Which top three trends will have the biggest impact on your role in 2022?\*

\*Respondents were able to select more than one trend



Source: CX Network

## DIGITAL TRANSFORMATION

Digital transformation is the evolution of business processes using digital tools that enhance efficiency and drive innovation. For CX practitioners, it was cited as the primary trend.

Emily Shirley, general manager of business card and marketing product retailer Vista UK and Ireland, suggests that this is due to the Covid-19 pandemic forcing businesses to adopt unprecedented levels of agility to pivot to a digital-first business model.

Likewise, Cyara's Gale, agrees and adds that the sudden need for digital transformation is due to the pandemic forcing everyone – businesses and customers alike – online.

"The surge in businesses shifting online has put pressure on [EMEA] companies to meet the high bar set by digital-savvy leaders who are investing heavily in CX engagement and innovation," Gale says. "Delivering a memorable and great experience has never been more important in the channels that customers prefer to engage in the most."

## DATA AND ANALYTICS

Data and analytics allow companies to glean a greater understanding of customer behaviour, helping them to provide personalised, more meaningful experiences. CX practitioners in EMEA are recognising its importance, with 13 percent of respondents citing it as a top trend.

Data and analytics are essential for CX optimisation. When it comes to observing customer behaviours through data analysis, Kitty Zhe Xu, quantitative user researcher at Pinterest, says the perspectives of multiple departments are vital to reaching accurate explanations for user actions and decisions.

"You need to rely on multiple sources of data and departments in your business, because every methodology has its pros and cons," Xu explains. "When you have multiple sources of data collectively telling a coherent story, that's when your data becomes compelling, and your story is more valid and trustworthy."



## DIGITAL CUSTOMER EXPERIENCE

Digital customer experience, the act of companies using digital platforms to deliver services to customers, has risen in prominence. Of all CX practitioners surveyed, 12 percent selected it as one of the top CX trends.

The decline in brick-and-mortar retailing, accelerated by the Covid-19 pandemic, has increased the need for seamless e-commerce experiences. Research by McKinsey found that, in response to the pandemic, digital adoption rose from [81 to 95 percent in Europe](#).

For most industries, when compared to pre-pandemic growth rates, this rise would have taken two to three years. Additionally, research by consultancy firm Redseer found that, for [75 percent of MENA customers](#), the first point of contact with a brand is via a digital channel. This means that frictionless online customer experiences are now essential for engaging and retaining customers.

Tarv Nijjar, senior director, global data analytics and AI at McDonald's, says: "The future has to be data-driven digital networks. The consequences of not being within one is, unfortunately, failure. Everyone is now attuned to an environment where they expect their data to be consumed by the brands they purchase from. If the experience is not slightly personalised to a customer's likes, it will turn them off and they will go elsewhere. Data and digital will allow companies to give the optimum experience to customers, and any companies that are not doing this will be at a disadvantage."

The next section of the report analyses the top challenges being faced by CX practitioners across the EMEA region. This section also offers solutions to these challenges.

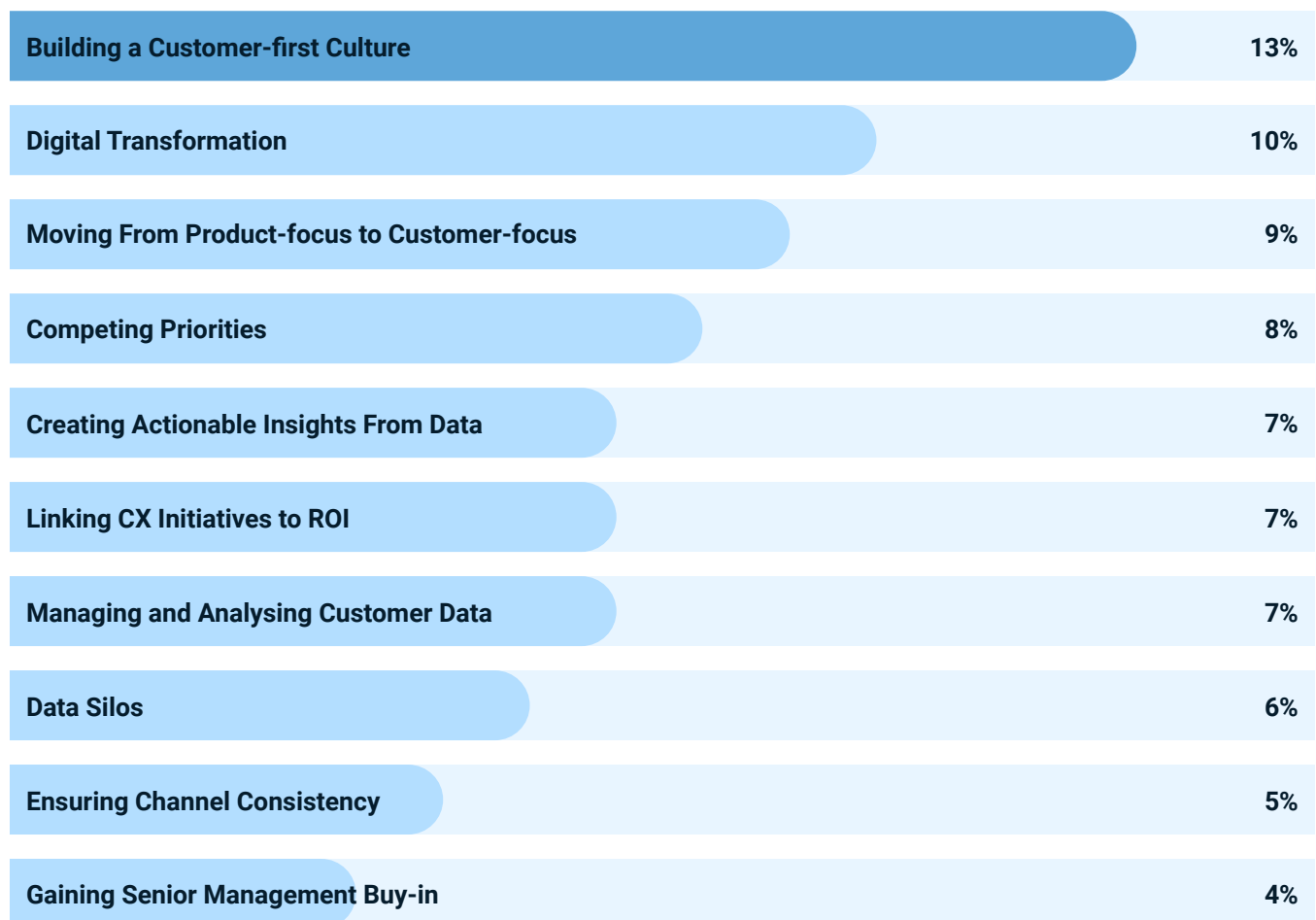


# Top 10 CX Challenges in EMEA

This section discusses how CX practitioners can take advantage of CX opportunities while avoiding any potential difficulties. It also looks at how they can prove ROI and secure spend for CX solutions.

## What are the three biggest challenges you are currently facing in your role?\*

\*Respondents were able to select more than one challenge



Source: CX Network

## SHIFTING THE FOCUS TOWARD CUSTOMERS

Putting the customer at the centre of decision-making for companies was listed as a top challenge by those surveyed. Building a customer-first culture and moving from a product-focused to a customer-focused business model were cited as a top challenge for 13 and nine percent of respondents respectively.

When looking to implement a customer-centric culture, Anders Normann, senior director of customer experience at transport company DSV Panalpina, advises companies to avoid steamrolling the organisation toward customer centricity by using a CEO mandate. Instead, Normann suggests that businesses appoint ambassadors for customer centricity – team members who want to work with management and wait until the programme has momentum before “tackling the sceptics”.

“The value of a CX programme only comes with the number of years it has been adopted and lived-out in an organisation – while it is nice to have the CEO mandate, having the local leaders is absolutely key,” he explains.

Cyara’s Gale also suggests mining contact centre agents for their insights. He recommends implementing mechanisms to keep tabs on customers over time, starting with regular metrics such as Net Promoter Score (NPS), Customer Satisfaction (CSAT) and Key Performance Indicators (KPIs) for contact centres and brand loyalty.

He notes: “The important piece of this puzzle is ensuring this work extends beyond marketing or the call centre. The data and insights should be shared regularly and throughout the organisation. This consistent drumbeat of customer-focused stories

and information sends a strong message to your organisation about the importance of a customer-first orientation.”

## DIGITAL TRANSFORMATION

One in 10 of those surveyed cited digital transformation as a significant hurdle (10 percent). This shows that while CX practitioners recognise its importance - as demonstrated in the previous section of this report - they are struggling to enact it within their businesses.

Gale suggests that this challenge is due to siloed departments that are not used to working together, and a risk-averse orientation of organisation that makes adopting new approaches difficult.

He notes that during a digital transformation initiative, it is crucial an organisation be clear on who is leading the transition.

“As businesses face challenges in their journey, teams will default to the old way of doing things unless you have leadership to keep everyone on track,” Gale says.

André Grandt, customer experience chapter lead at pharmaceutical company Roche, says his golden rule for CX transformation is staying as close to customers as possible. “The needs of your customers are your destination; your customers are the pilots of the transportation.

“Get to know your pilots the best you can, and they will take you to where you need to go – and know the shortcuts as well,” he explains.

The next section of this report will explore both the top CX investment opportunities and hurdles for those in the EMEA region.

“When you have multiple sources of data collectively telling a coherent story, that’s when your data becomes compelling, and your story is more valid and trustworthy.”

**Kitty Zhe Xu**

Quantitative User Experience Researcher at Pinterest

# Top 10 CX spend priorities in EMEA

Here we explore how CX practitioners based in EMEA are investing to overcome the challenges they face.

## INVESTMENT IN DIGITAL SOLUTIONS

While the answers from those surveyed were spread out across a number of investment opportunities, three main spend priorities are identified: customer relationship management (10 percent), digital customer experience (10 percent) and digital marketing (7 percent).

As highlighted in the Opportunities section of this report, the results indicate that CX practitioners across the EMEA region are willing to financially back digital CX and digital transformation, as well as customer data and analytics. The appetite to allocate a large budget should also be noted – 29 percent are investing more than US\$1mn in CX solutions.

When looking to implement digital marketing and solutions, Cyara's Gale offers three pieces of strategic advice:

### 1. TAKE BABY STEPS

Evaluate the digital channel(s) that your customers already spend time on and that are standard for your industry and pick one or two to introduce.

### 2. PUT QUALITY ASSURANCE FIRST

If the digital channels you choose do not provide value or worse, fail on a technical level, then you may as well never have embarked on this endeavour. It is essential that before you start opening digital channels to customers, you have established a testing and quality assurance process that evaluates the customer journey flows and the technology on which these channels are built.

### 3. PUT QUALITY ASSURANCE FIRST

As demand for digital customer-facing channels and touchpoints is at an all-time high, it can be quite a struggle to keep up. Strategic organisations inject self-service paths within their digital CX, such as offering a chatbot that can answer questions without engaging a live agent, wherever possible to ease the burden.

# What are your top three investment priorities for 2022?\*

\*Respondents were able to select more than one opportunity

**10%**  
CRM

**10%**  
Digital Customer Experience

**7%**  
Digital Marketing

**6%**  
Customer Loyalty and Retention

**5%**  
Customer Acquisition

**4%**  
Customer Insights

**4%**  
Contact Center Solutions

**4%**  
Customer Journey Mapping

**2%**  
CX Automation

**2%**  
Cloud Services



## ROI AND BUDGET

The main obstacles complicating the investment in CX solutions were finance-based, with respondents citing finding budget (17 percent) and demonstrating ROI (15 percent) as major hurdles.

When looking to demonstrate ROI from CX, Gale recommends companies agree upon and set clear and realistic goals. He advises the KPIs around such initiatives are linked to the business' bottom line, then rigorously tracked.

Gale also notes that these KPIs can be used to build a case for stakeholders when attempting to gain executive buy-in.

"Use the KPIs you have chosen to measure to clearly state what the business can expect to see and set realistic timelines of when these improvements will be realised. To seal the deal, show examples of where others have succeeded by improving the quality of their customer experience," he said.

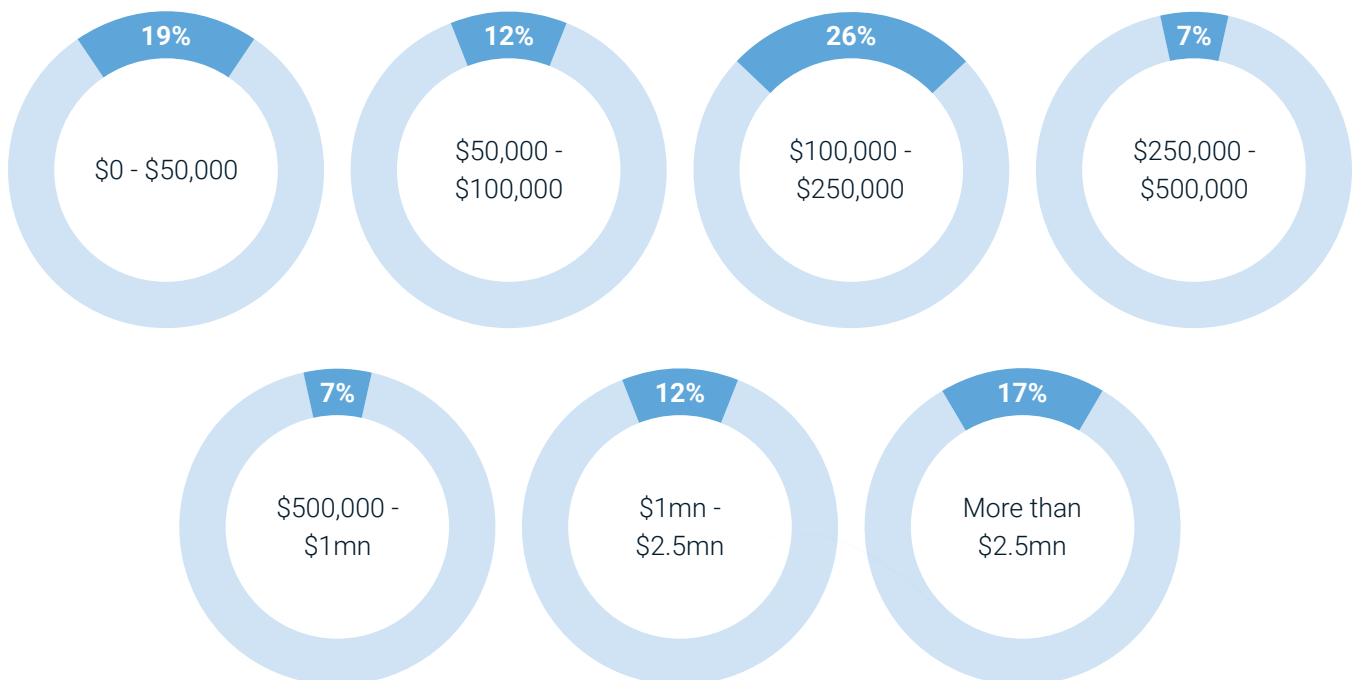


“The top things to avoid are expanding channels blindly for the sake of ‘being omnichannel’ or ‘needing to show the brand presence’ and creating unnecessary silos by segmenting or grouping support agents per channel.”

**Saki Takeda**

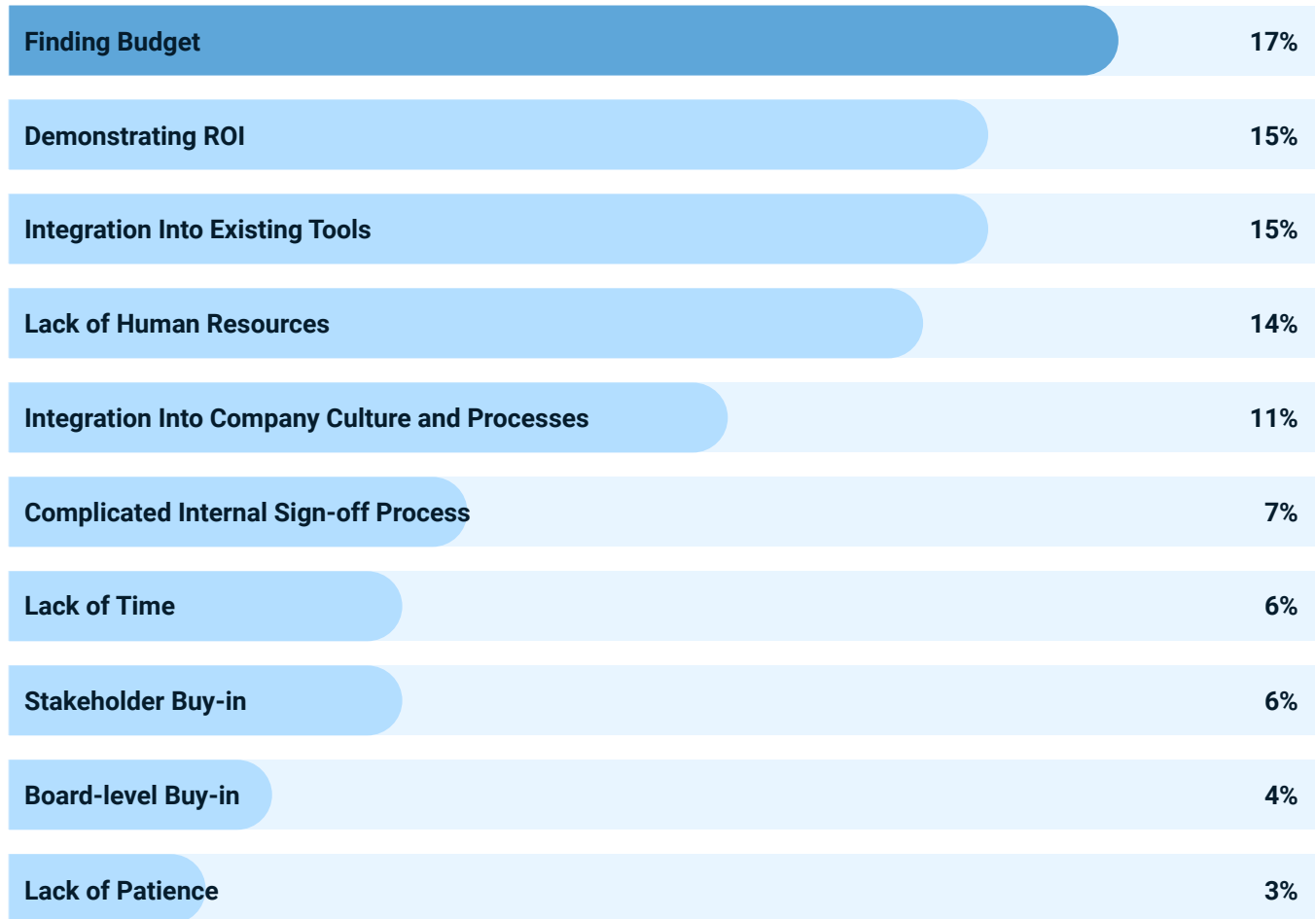
Director of product management at Netflix

## What is your annual budget for CX solutions (US\$)?



# What will be the top obstacles for bringing investments to life?

\*Respondents were able to select more than one challenge



## MITIGATING THE CHALLENGE OF TECH INTEGRATION INTO EXISTING TOOLS

The integration of new technologies into existing CX tools was also flagged as an investment challenge by 15 percent of EMEA CX practitioners. Their stated reason was the potential to create data and tech silos, which ultimately leave the business in a worse position as a lack of interconnectivity between systems blocks the flow of information across departments.

Netflix's Takeda notes that it is important for companies to understand the difference between

multichannel and omnichannel and place a strong focus on the customer journey.

"The top things to avoid are expanding channels blindly for the sake of 'being omnichannel' or 'needing to show the brand presence' and creating unnecessary silos by segmenting or grouping support agents per channel," Takeda notes.

Source: CX Network

# Summary

Companies across the EMEA region are looking to overcome the challenges they are facing, including customer centricity, linking ROI to CX and enacting digital transformation. In order to remain ahead of the curve on these issues and not regress, they should be continuously improving their processes and investing in key CX solutions that will benefit them and their customers. These solutions include CRM, digital customer experience and digital marketing.

By applying these solutions, brands can boost customer loyalty and retention by meeting their expectations. CX practitioners can use these benefits to win the support of stakeholders by demonstrating the financial benefits of CX investments.

Additionally, companies should look to inspire loyalty and retention. Since customers are placing emphasis on company ethics and CSR, businesses should openly, honestly, and transparently share the processes and solutions they are either enacting or plan to implement.

There is a competitive advantage to be gained by brands that act on the customers' preferences and desires outlined in this report. As the analysis demonstrates, providing self-service digital channels can solve the pain points customers experience around convenience and accessibility. However, digital channels must be provided consistently and efficiently, as failure to address these points will negate the advantages that can be achieved.



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