

Communication Calibration

An Adare SEC Voice of
the Consumer Report

October 2024



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Introduction

There's a quote from American author Mark Twain that rings true when talking about customer communications: "Continuous improvement is better than delayed perfection." Anybody with decision-making responsibilities in the field of customer and citizen communication management can be forgiven for feeling overwhelmed by the pace of change and the search for multi-channel, bi-directional communication nirvana. The perceived scope of the challenge can often lead to delayed decisions and reliance on legacy operations until 'the time is right'. But as our latest survey results show, the finishing post is always shifting.

This report captures the views of 2000 UK citizens on key communication themes. The findings provide an accurate barometer reading of current attitudes and a clear indication of future expectations and desires.

Such data is important. Second-guessing how consumers and citizens wish to be treated is a fast-track to problems further down the line.

The temptation may be to shift priorities and explore new technologies – to keep up with the digital disruptors – but our survey results show a preference for real balance when it comes to delivering great service. And it is great service – coupled with message efficiency – that will boost the bottom-line.

Our title, *Communication Calibration*, reflects Twain's theme of continuous improvement. Instead of being daunted by the challenges ahead, vanguard organisations are focusing on identifying pain-points, pin-pointing the legacy causes of friction, and 'building to better' in a measured step-by-step fashion.

I hope you enjoy the read.



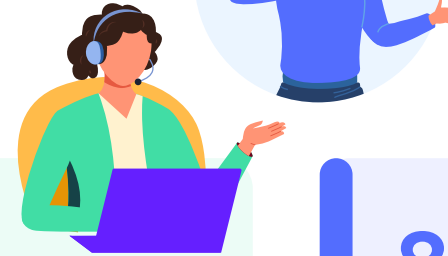
Tony Strong,
CEO, Adare SEC

Methodology

Adare SEC commissioned independent market research specialist Vanson Bourne to undertake the research upon which these findings are based. A total of 2,000 UK adults were interviewed in August 2024. Respondents had to be aged 18 or over and the sample was nationally representative by age and gender. The interviews were conducted online and were undertaken using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate. Unless otherwise indicated, the results discussed are based on the total sample.



Key Findings



69% Agree
customer service has not improved
in the last 5 years

82% Agree
customer service is too focused on
apps and technology rather than
person-to-person

86% Agree
expect organisations to know everything
about previous transactions

Only
15%
believe organisations can answer queries
quickly and accurately

Next 3 years
Significant rise in organisational use of AI
chatbots, mobile apps and social media;
significant decrease in person-to-person
service and phone calls

47%
unwilling to use a human-like
AI chatbot

68%
frequently worry about data security

38%
still choose to receive
paper communications



32% Agree
sustainability track record is as important
as price



Customer Service in Stasis?

While the proliferation of messaging channels offers consumers and citizens more ways to communicate, this choice of channels has not noticeably improved customer service. In fact, 69% of respondents believe that customer service has not improved in the last five years (Fig.1).

There is a danger of organisations spreading themselves too thin in trying to manage all platforms without a cohesive strategy.

This results in customer service teams being reactive rather than proactive, trapped in a cycle of juggling multiple communication channels and managing this complexity without delivering meaningful improvements.

Despite the prevalence of digital channels - and their undoubted convenience - respondents still value human interaction. 82% of respondents feel that customer service is too focused on apps and technology rather than person to person (Fig.2).

Fig.1

Customer service has not improved in the last five years

Agree

69%

Disagree

27%

Fig.2

Customer service is too focused on apps and technology rather than person to person

Agree

82%

Disagree

15%



Customer Service in Stasis?

Indeed, when asked to identify factors that contribute to delivering a good customer service, 'the ability to speak to a human being on the phone' scored highest (Fig.3).

Organisations must address this challenge. The call-centre is a relatively expensive operation, but one seen as essential by respondents across all age groups.

A streamlined and efficient call-centre is only achievable if all channel touchpoints with recipients are expertly managed and joined-up.

In this way, call-centre operatives are presented with a holistic picture of the customer or citizen's journey and are able to respond to queries with accuracy and efficiency. In time, as digital channels are more successfully integrated, the call-centre burden and resulting expense will reduce.



Fig.3

Q: Which of the following are the most important factors in delivering a good customer experience for you?





Knowing Me, Knowing You

Being 'joined up' and eliminating siloes of operation is a critical play. Today's customers and citizens expect the organisations they deal with to be able to call up past transactions and answer queries based on prior knowledge and interaction history.

From the operational side, the ability to provide such seamless service makes sense for two key reasons. Firstly, the organisation eliminates wasted effort and resources. Messages are sent at the right time and to the right person, without crossover or duplication. The operation is efficient and cost-effective. Secondly, customer service is boosted. Customer and citizen queries and actions can be processed and answered more quickly via the appropriate channel. The recipient is reassured.

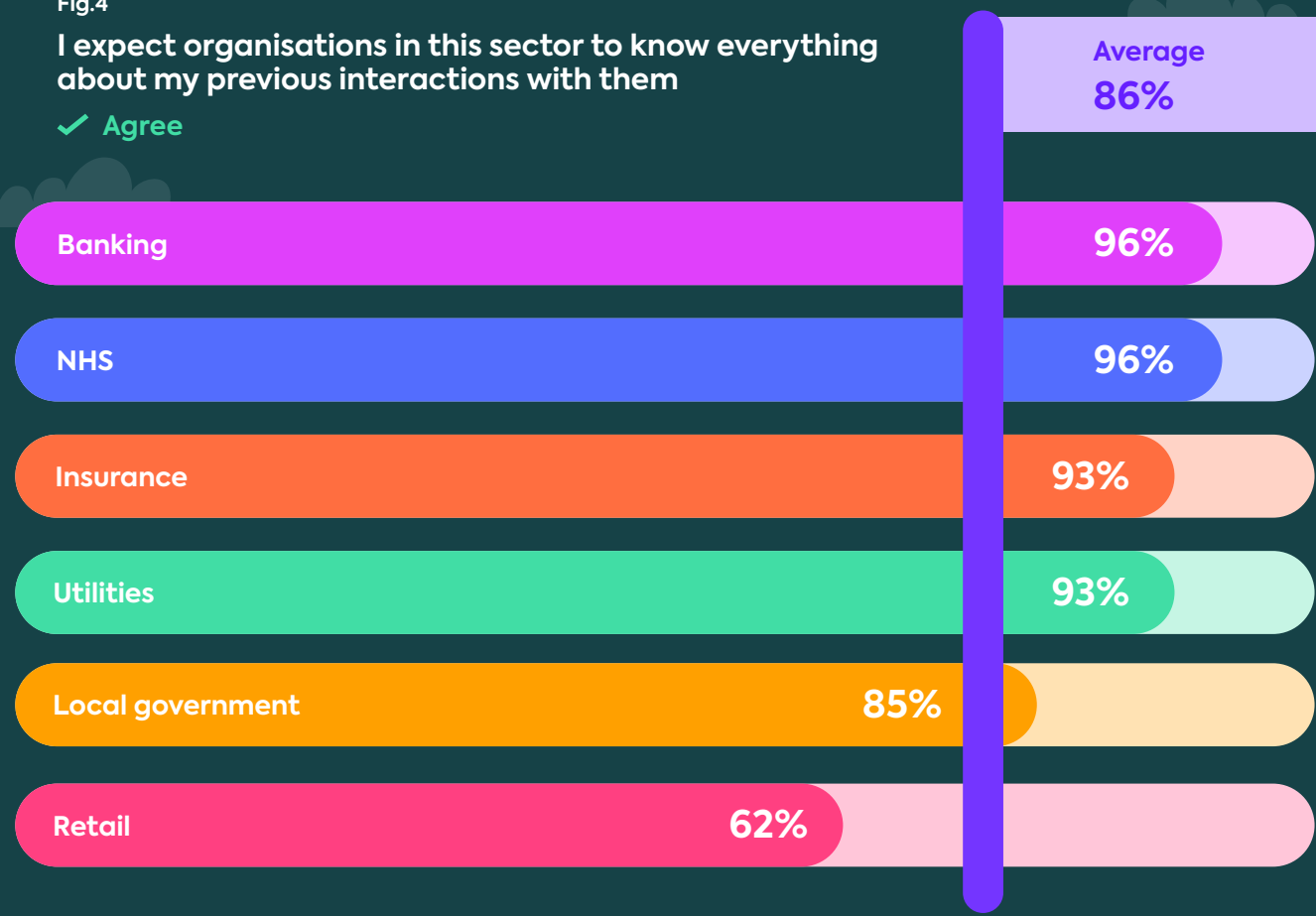
Our survey shows the level of expectation for each sector to be able to deliver this standard of holistic service support (Fig.4).



Fig.4

I expect organisations in this sector to know everything about my previous interactions with them

✓ Agree



Consumer and citizen expectations are sky-high, and organisations must overcome legacy obstacles to remove siloes and join the communication dots.

The lower figure for the retail sector can be explained by the fact that interactions in this sector are often seen as one-off or short-term exchanges. Consumers do not always expect the same level of continuity or personalisation in their interactions as they do with long-term services like banking or healthcare, where maintaining a detailed history is more crucial.



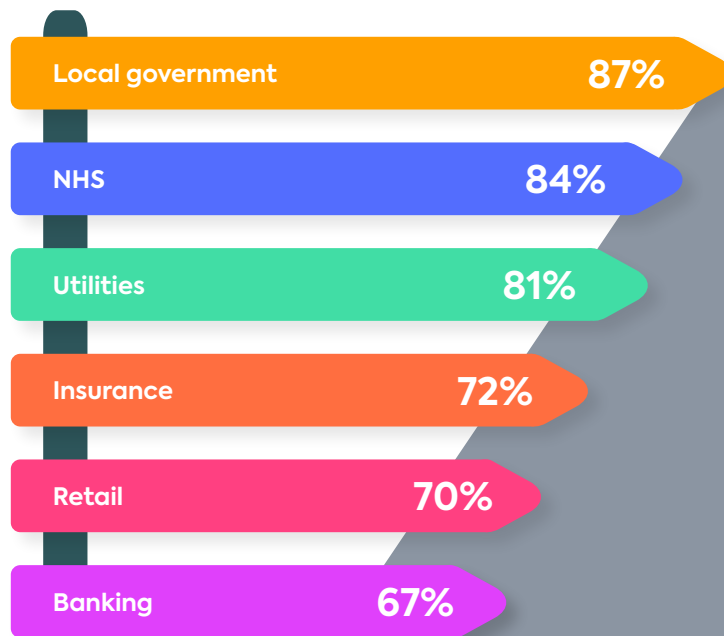
Knowing Me, Knowing You

We also asked respondents whether key sectors could improve on the standard of communication offered (Fig.5). Again, results were clear – improvement is required across the board, with the public sector and utilities sector regarded as most in need of a communication management upgrade.

Fig.5

Organisations in this sector need to improve their communications

✓ Agree



Although the figures in Fig.5 are high, a reality check is needed. Every sector is pushing its communications forward and evolving communication strategies. The private sector is driving digital self-service via tailored portals and progressing its use of apps and AI to offer customers better insights and around-the-clock convenience. Similarly, the public sector is exploring channel shift – transforming from paper-heavy, manual-reliant legacy processes to more nimble digital provision.

The difficulty is that consumer and citizen expectations continue to heighten and evolve, driven by innovation and comparison to the behaviours of brand giants such as Amazon, Apple and Google.

This constant evolution makes it nearly impossible for organisations to stay fully aligned with expectations across every sector, forcing them into a continuous cycle of improvement and adaptation.

This is where organisations have to be savvy, and where data is key. Analysing customer journey and contact data enables organisations to cut their communication cloth accordingly. It's about incremental steps of improvement rather than chasing a perfection that can never be realised.



Knowing Me, Knowing You

Certainly, regulation such as Consumer Duty is placing the focus firmly on communication clarity and convenience and serving as the catalyst to drive change.

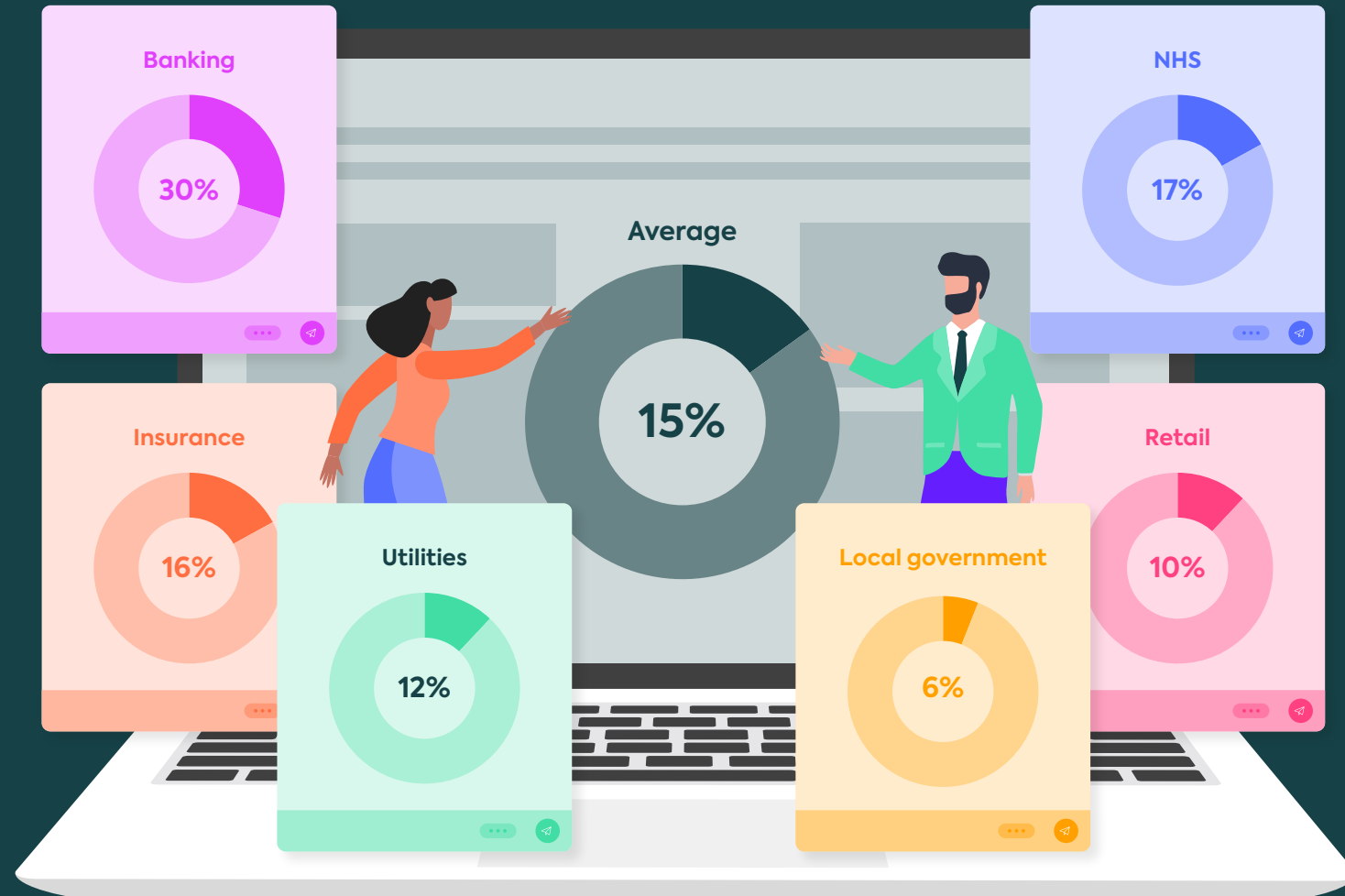
Often, Consumer Duty commentary is focused on the messages that are sent – in other words, focusing on the requirement for communications that are easily understood by the recipient.

But Consumer Duty also calls for customers to get the appropriate level of support when they need it. Our survey shows that UK citizens currently have limited confidence in organisations to answer queries quickly and accurately (Fig.6).

Again, swift and accurate responses are enabled by joined-up processes. Eliminating siloes and expediting the sharing of information from every touchpoint puts organisations in the customer service driving seat.

Fig.6

I am very confident that organisations in this sector are able to answer queries quickly and accurately





AI & Channel Futures

So, what do consumers believe the communication channel picture will look like in the next 3 years? Overall, the expectation is for a big rise in digital service in the form of AI-based chatbots, mobile apps and social media. A major decrease is expected in person-to-person service and in phone calls (Fig.7).

Immediately, these figures highlight the dichotomy between expected progression of customer and citizen messaging and the actual desires of the recipients. We saw in Fig.3 the importance placed on speaking to a human on the phone. Further to this, 69% of consumers state they would be likely to stop using an organisation if it didn't provide the option of speaking to a customer representative on the phone (Fig.8). And real scepticism exists around call-centre queues and wait times (Fig.9). Half of UK adults believe long call-waiting queues are manufactured to encourage callers to hang-up and use another channel.

Fig.7

Q: How do you think communication with organisations will change in the next 3 years?

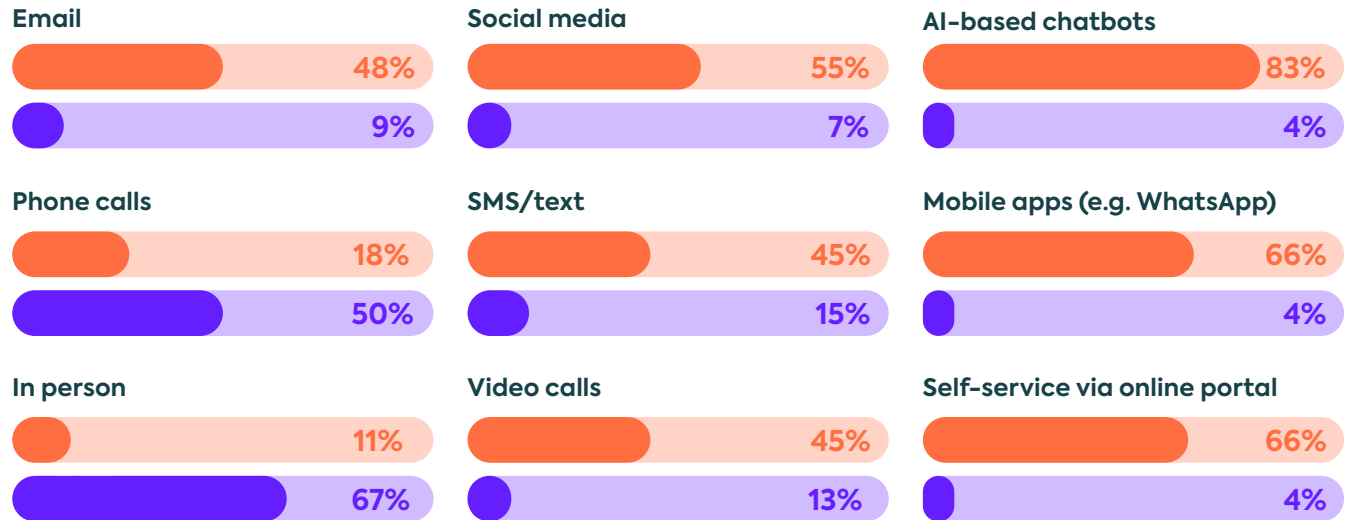


Fig.8

I would be likely to stop using an organisation if it didn't provide the option of speaking to a customer representative on the phone

Agree 69%

Fig.9

Call centre waiting times and queues are not real and are designed to make me hang-up

Agree 50%



AI & Channel Futures

The challenge of retaining human contact within the communication mix is one that must be addressed by every sector.

Generative AI is being promoted as a solution, and major progress is happening in terms of the sophistication of these tools. Figs.10 and 11 show greater acceptance of AI amongst Generation Z and Millennials but also reveal unease and scepticism amongst the rest of the adult population. Other findings corroborate this. A 2023 Gartner report revealed that only 8% of customers used a chatbot during their most recent customer service experience. Of those, just 25% said they would use that chatbot again in the future.

Digital transformation of processes cannot afford to leave people behind, and integrating these tools will require education, reassurance and a measured approach. Chatbots aren't effective for all issue types. Analysis to date shows that resolution rates are highest for queries such as returns or cancellations, or orders. To expedite chatbot adoption, the key is to focus on improving the chatbot's ability to move issues forward, guiding customers and citizens to chatbots when appropriate for their issue and to other channels when not.

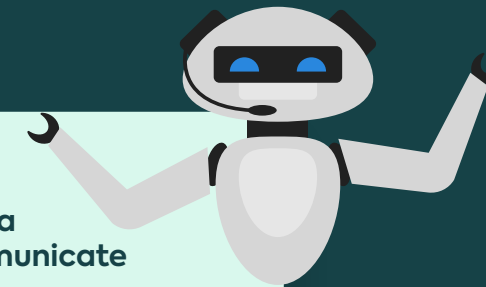


Fig.10

I would be UNWILLING to use a 'human-like' chatbot to communicate with organisations

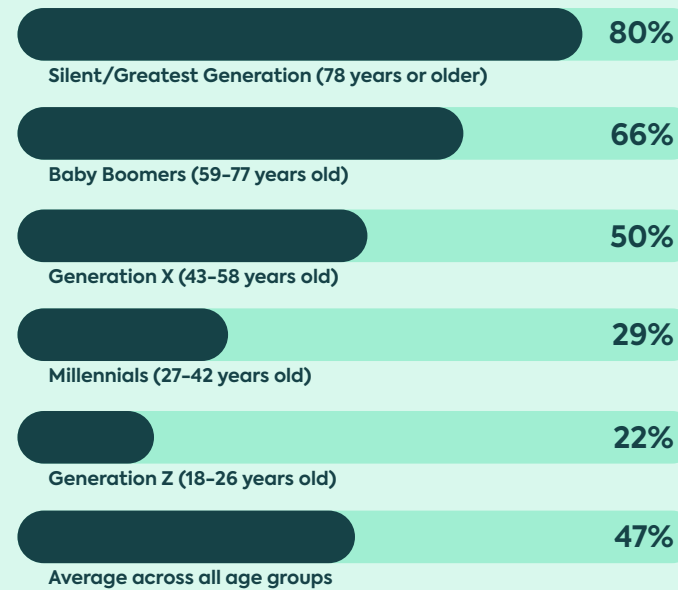
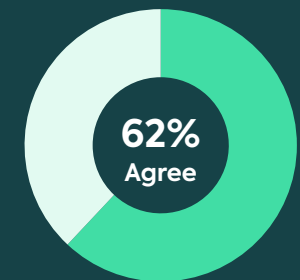


Fig.11

AI-generated communications are less trustworthy than human-generated ones





Can I Trust You?

Organisations face a significant challenge in balancing the need for convenient, multi-channel communication with the stringent requirements of data security. Every channel touchpoint is a potential point of vulnerability.

Right now, the trust from consumers and citizens isn't there (Figs.12, 13 & 14). According to IT Governance data there were 2,814 data breaches in 2023, with over 8 trillion breached records. These figures make headlines and cause understandable concern.

There is an obvious play for organisations to better communicate their security efforts in ways that reassure their audience.

But while customers and citizens care about data security, many may feel overwhelmed or fatigued by technical information, leading to a lack of engagement on this topic. To overcome this inertia, organisations can simplify and personalise their communication around security measures. Instead of presenting dense, jargon-heavy content, organisations might

use visuals, infographics, or short, clear messages that focus on how these measures directly benefit the customer, such as safeguarding their privacy or preventing fraud.

If an organisation suffers a data-breach, communication is critical, but customer and citizen confidence in organisations to communicate with speed and clarity is low (Fig.14). It is proactive action and total transparency that will ease concerns and rebuild reputations, but such rapid and joined-up responses are only achievable if the organisation has its customer and citizen data in shape.

The finding relating to confidence in emails is notable (Fig.15). Recent third-party reports highlight the fact that 80% of cyber attacks start with an email. Little wonder that the channel is regarded with suspicion by half of our survey respondents.

Regaining trust in the email channel requires organisations to focus on ensuring message consistency across all communication channels. Marketing, customer service, sales, and IT departments need to share data and insights, ensuring a consistent tone, look, and message across all channels. Clear and consistent branding and messaging helps consumers more easily verify the legitimacy of emails.



Fig.12

I frequently worry about the security of my data

68% Agree



Fig.13

I'm not fully confident that the organisations I deal with have taken every measure to protect my personal data

68% Agree



Fig.14

If an organisation I use suffers a data breach or other crisis, I am NOT confident their communication with me would always be swift, clear and helpful

77% Agree



Fig.15

I struggle to know whether emails from organisations are real or scams

50% Agree



Hard Facts on Hard Copy

Paper remains an essential part of the communication mix. The benefits of digital processes are clear in terms of organisational agility, cost-efficiency and customer service convenience.

But digital transformation does not mean eradicating paper.

Again, it is about reading patterns of interaction and directing services and message types to the most effective channel.

Paper communications are still chosen by a huge swathe of the adult UK public (Fig.16). The reasons behind choosing paper are also examined (Fig.17). Paper records are regarded as tangible and reassuring, and this attitude - perhaps surprisingly - spans the generations (Fig.18).

Fig.16

I choose to receive paper communications from the following sectors

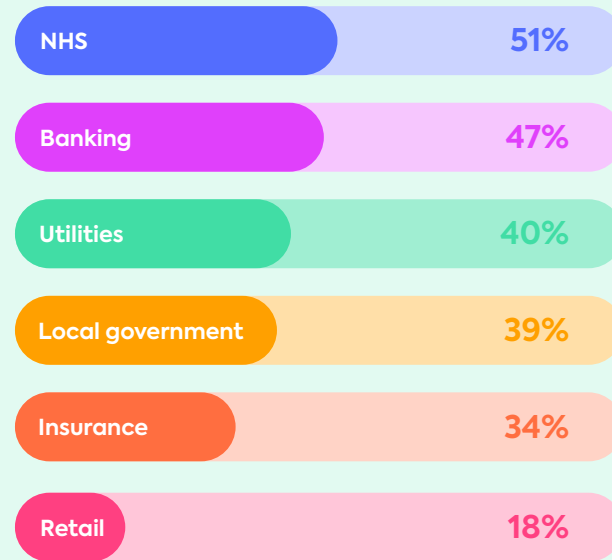


Fig.18

I like to keep a paper record of transactions

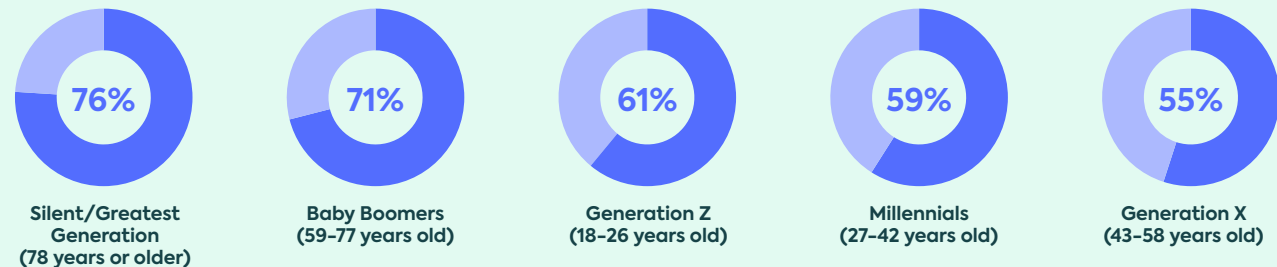
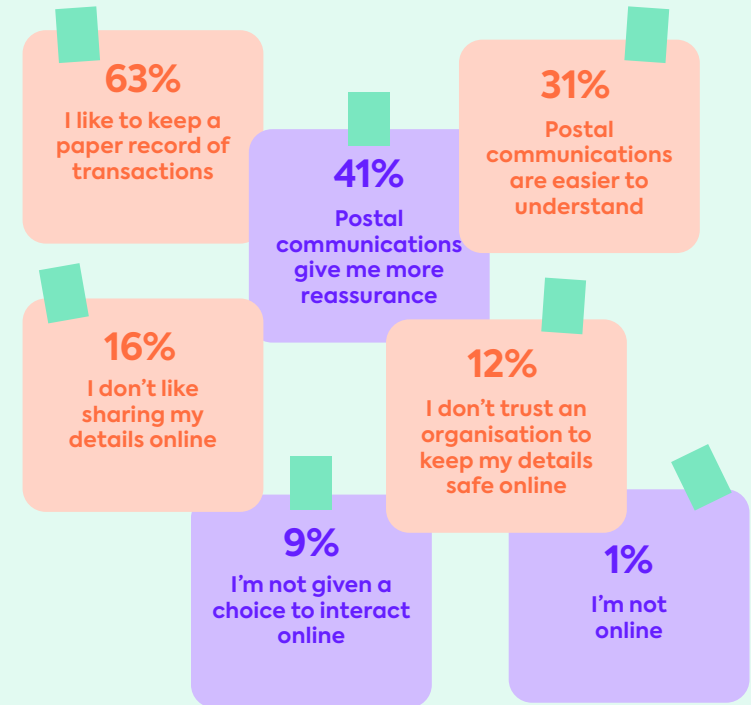


Fig.17

Why do you choose to receive paper communications?





The Green Scene

Our 2023 consumer survey, *Communication Cut-through*, revealed a remarkable statistic on sustainability. 32% of respondents agreed that the sustainable footprint of a business was as important as the price of product or service. Is the picture the same one year on?

In fact, as Fig.19 shows, the figure has remained exactly the same. Indeed, 22% of respondents today regard sustainability to be more important than price (Fig.20). Such figures remain remarkable, particularly in light of the cost-of-living crisis and recent political turbulence.

Further analysis of the figures reveals a clear gender split, with 50% of males believing sustainability to be less important than price, compared to 37% of females (Fig.21).

Organisations may wish to take such figures into consideration when tailoring messages to audiences. Certainly, communication management processes can play a key role in reinforcing sustainability credentials.

The commentary in our 2023 report still rings true today: “Consumers and citizens will quickly pick up on red-flag factors such as duplicated or excessive messaging or ineffective and time-consuming query

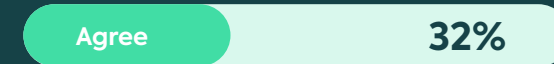
resolution – anything where information could be imparted more quickly, more efficiently and with less impact.”

Saying you’re a sustainable organisation is one thing; proving it through considered and efficient actions is what counts.

Fig.19

The sustainable footprint of an organisation is **AS IMPORTANT** as the price of product or service

2023



2024

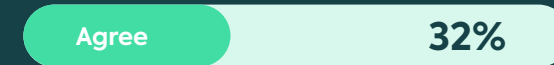


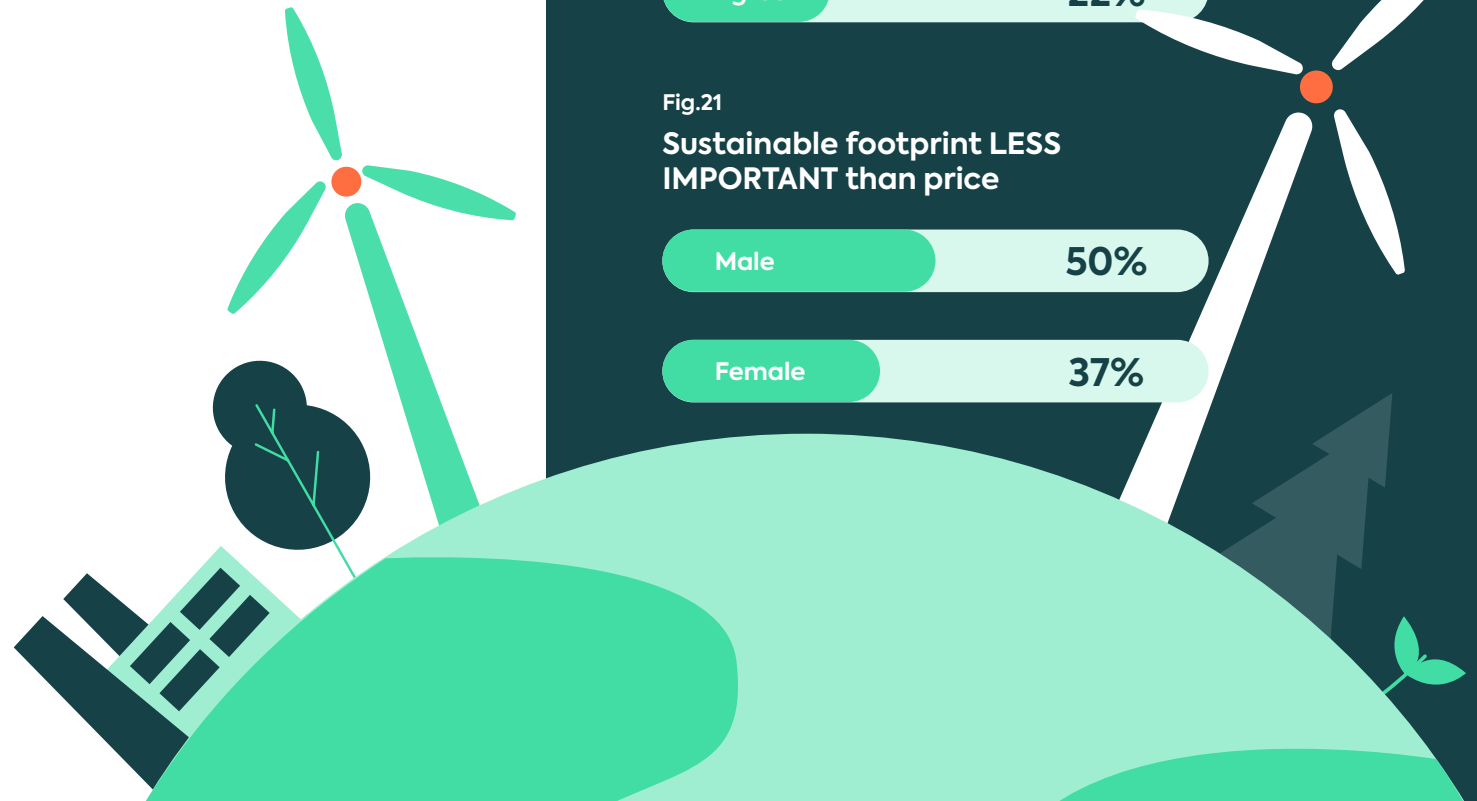
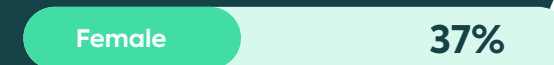
Fig.20

Sustainable footprint **MORE IMPORTANT** than price



Fig.21

Sustainable footprint **LESS IMPORTANT** than price



Conclusion

These survey responses paint a picture of a challenging and constantly evolving communication environment.

Organisations must juggle multi-channel service with robust security, considered sustainability and personalised preferences – all within a strict regulatory framework.

The customer and citizen experience is front-of-mind for private and public sector alike, but satisfying expectations is difficult in a world where big-brand digital convenience and instant insight is ubiquitous.

Keeping up with the Joneses and attempting to transform communications from top to bottom is simply unrealistic for most operations. But there are strategic wins that can quickly improve both process efficiency and service provision.

Whether alone, or with expert third-party support, organisations must map customer journeys, identify areas of success and areas of friction, and transform from legacy at a pace that suits. Often, organisations look to one project – one point of proof – before having the confidence to adopt more widespread improvements.

Digital transformation is the guiding light for organisations across all sectors as they look to drive communications forward. But our survey shows that this must not be at the expense of paper, with hard-copy still chosen – and valued – by many, and across all generations.

Generational preferences are another core consideration for communication managers. Over 10 million people are currently aged 65 and over, making up 18% of the population – and people aged 80+ represent the fastest growing segment of the population. Will communication strategies have the agility to flex to the changing preferences of a developing demographic?

There is no finishing line – expectations will always be a step ahead.

But there is a way for organisations to keep moving communications forward at an efficient and effective pace. Communication calibration is required, tuning operations in a measured fashion to drive continuous improvement. The journey from legacy is taken step by step.



