



hiya

STATE OF THE CALL EUROPE 2022



150B+ calls analyzed
1,200 businesses surveyed
8,153 consumers surveyed
1 report

hiya.com/state-of-the-call



2022 State of the Call

The voice channel is ever changing. Societal, market, and consumer pressures continue to shape how we use the voice call today and into the future. That's why we step back every year to dissect the latest insights and top trends on the voice channel, and help the industry—carriers, device manufacturers, businesses, tech providers, and regulators—better understand how we communicate and do business. This year's report is our most comprehensive ever. We commissioned a market research firm to survey more than 1,200 businesses and 8,153 consumers in the UK, Germany, France and Spain. Those results, combined with our analysis of more than 150 billion phone calls in 2021, produced several powerful insights.

Top 10 Trends

- ① **Voice is powering how we work.**
- ② **Consumers want businesses to call.**
- ③ **The voice channel is continuing to grow—and shows no signs of stopping.**
- ④ **If it's urgent, pick up the phone.**
- ⑤ **Spam and fraud calls are a growing problem globally.**
- ⑥ **Scam and spoof calls are increasingly bad for business.**
- ⑦ **Many businesses don't know how their calls are delivered.**
- ⑧ **Consumers are screening unidentified calls more than ever before.**
- ⑨ **Businesses are bearing the brunt of unanswered calls.**
- ⑩ **Businesses believe branded calls are the solution.**

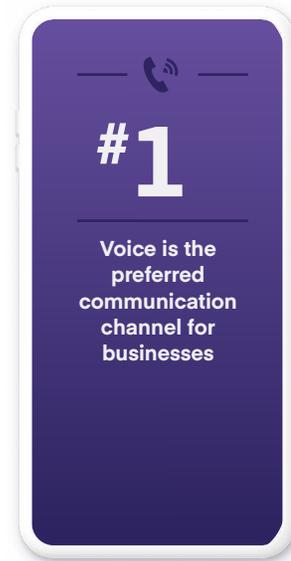
Trend 1:

Voice is powering how we work.

In a remote-first world, how do you communicate? Do you send a quick text? Email? Maybe you schedule a quick video call. Academic research, however, suggests you should pick up the phone. This was the finding of a recent study conducted by Cornell University and Ryerson University that looked at the effectiveness of different communication channels. And this trend isn't isolated to one study. It is also reflected in a [recent survey](#) of how 1,200 businesses and ~8,100 consumers use the voice channel to connect and do business.

Over the past two years, the shift to remote work and subsequent drop in face-to-face interactions has created new ways of communicating with coworkers and customers. With real-life interactions being limited—or impossible—the phone call has remained the preferred method of communication. It's immediate but not intrusive. Convenient while still being personal.

Businesses prefer voice



- 41% Voice call
- 30% Email
- 8% Text
- 6% Video call
- 4% Chatbot

Across Europe, businesses have turned to voice as the preferred communication channel for most interactions, including:



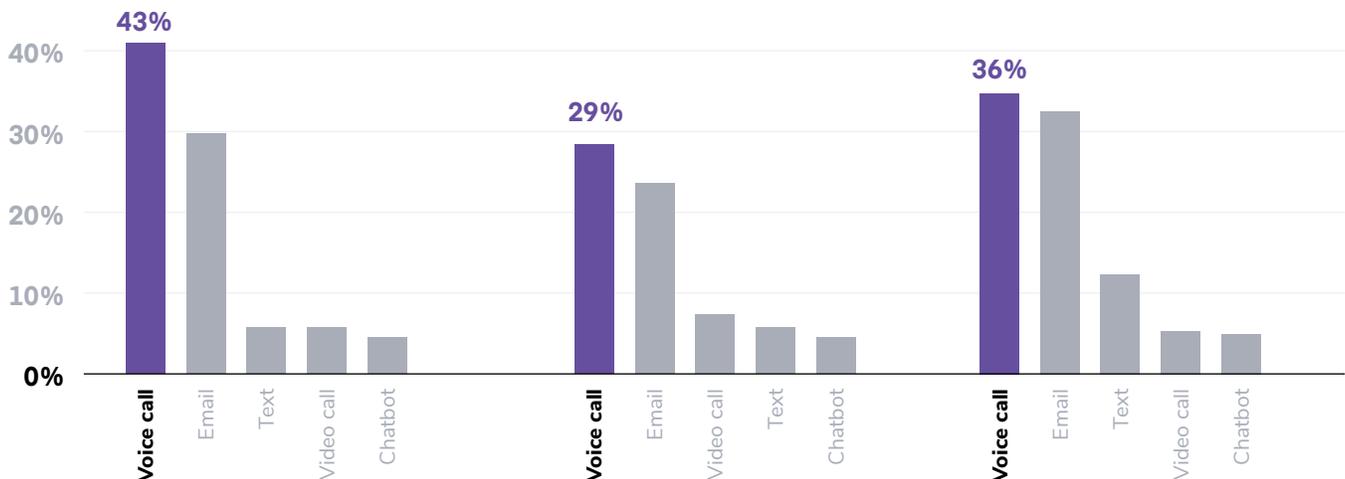
Resolving customer issues



Closing sales



Scheduling appointments

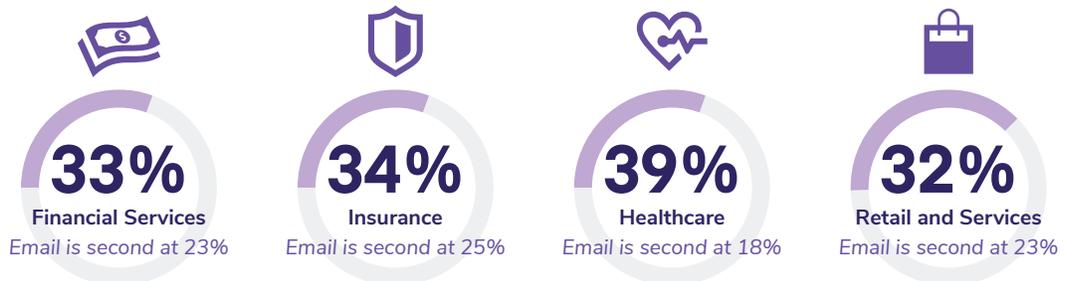


Trend 2:

Consumers want businesses to call.

We've seen an explosion of new ways to communicate over the last few years: messaging apps, video calls, voice notes, even virtual reality. And while these new tools have received a lot of media attention and praise, the phone call has remained dominant. It's the most popular form of communication everywhere in the world. We turn to the phone when we need to contact our banks, healthcare providers, insurance companies, coworkers, and friends and family.

People prefer voice for interactions with:



Video call fatigue

While the video call has exploded over the past two years of the pandemic, it pales in comparison to the popularity of voice. Amongst more than 8,100 consumers surveyed, the phone call ranked 27 percentage points higher than the video call—the second-largest disparity between communication channels (voice compared to website chatbots showed the largest disparity).

This trend of consumers preferring voice calls is critical for businesses. With brick-and-mortar locations replaced by quick swipes on websites and apps, the phone call offers one of the only personal connection points that businesses have with their customers. That's why people are more likely to conduct banking and financial transactions, disclose credit card information, and discuss health issues over the phone than any other channel.

The voice channel is continuing to grow—and shows no signs of stopping.

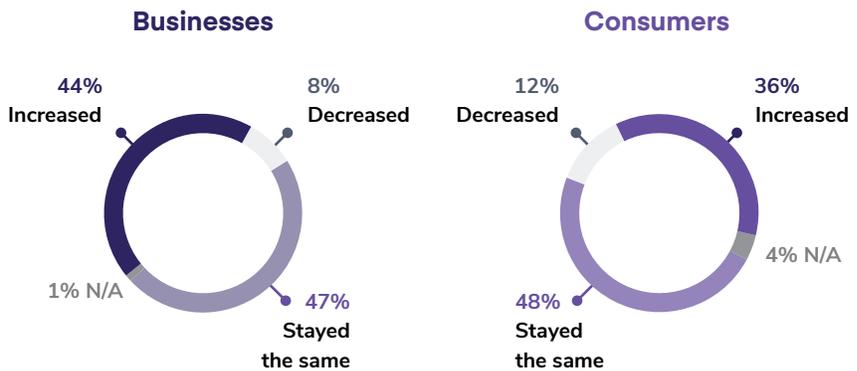


Spotlight on Spain

Spain stands out as the country where the voice call is predicted to increase most significantly. Of the more than 2,000 consumers surveyed in Spain, 43% reported that they anticipate that they will use the phone call more in the next year—15 percentage points higher than the average of other countries surveyed. And Spain is the lowest of any country with only 8% of respondents believing their phone use will decrease.

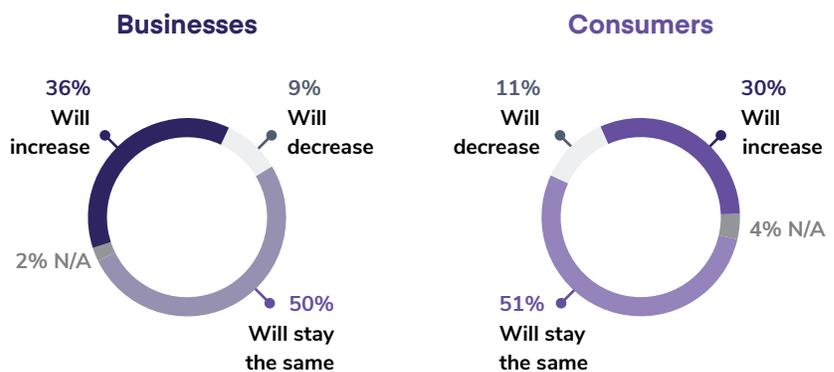
As a result of both businesses and consumers preferring the phone call, usage of voice continues to grow. According to Hiya's data, people spent an average of 98 minutes on the phone per month in 2021—an average of 58 incoming calls and 59 outgoing calls daily. And this translates to the working world: Among business professionals, over 90% of survey respondents indicated that their use of voice calls increased or stayed the same over the past 12 months.

How has your usage of the phone call changed in the last 12 months?



What's more, this trend is likely to continue. The majority of businesses and consumers predict their use of the voice call will increase or stay the same over the next 12 months.

How do you predict your usage of the phone call will change in the next 12 months?



Trend 4:

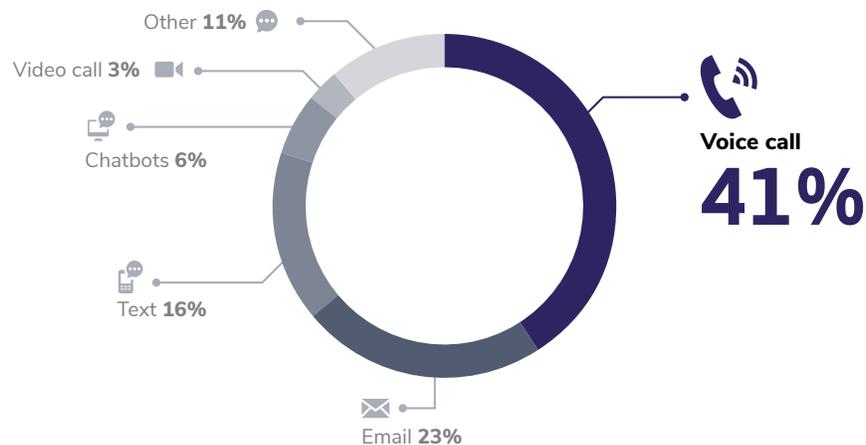
If it's urgent, pick up the phone.

Voice is the definitive choice for time-sensitive conversations. There is no communication channel that's as immediate and convenient as the phone call. Emails and text messages result in a delayed response time. And, while video calls provide the same real-time interaction as voice, they are often not a convenient method of communication—especially between businesses and consumers. Voice offers the optimal channel for nearly all time-sensitive interactions, including deliveries, service issues, speed to sale, health issues, school closures, and the list goes on.

When you're hungry:

Food delivery services prefer the voice call for every customer interaction, including responding to inquiries, resolving issues, closing transactions, and communicating with coworkers. In fact, food delivery services prefer the phone call nearly 10 percentage points higher than the average.

The voice call is the preferred method of communication for food delivery services



When you're sick

When communicating with patients, 43% of healthcare providers prefer using the phone—14% more than the second-most preferred channel: Email. Similarly, 41% of pharmacies prefer the phone call, while 26% prefer email.

When you're closing a sale

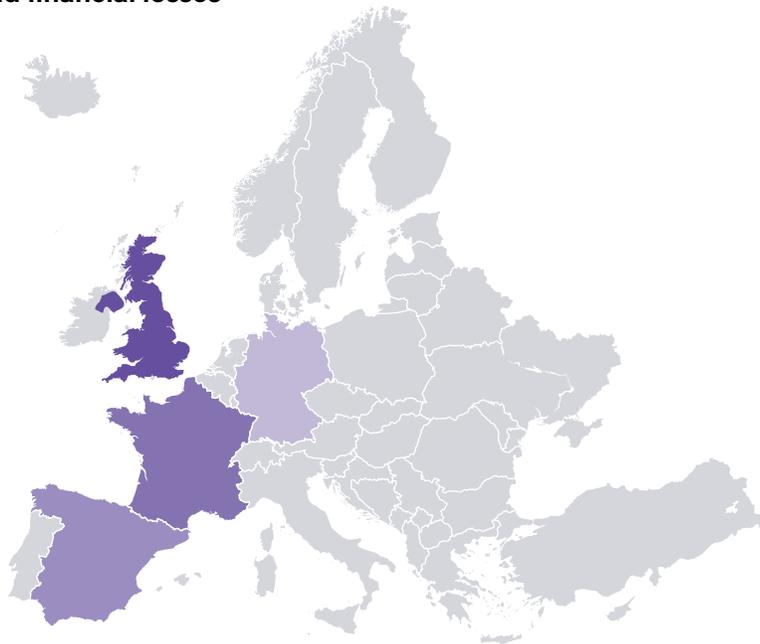
The phone is The Closer. Most industries—including auto services, finance, insurance, retail, transportation, and travel—use the phone call to close sales.

Trend 5:

Spam and fraud calls are a growing problem globally.

Phone scams are nothing new. They have been around for decades and continue to plague the voice network. These scams are cheap to operate, are easy to run anonymously, and can result in high rewards. And, as people use the phone more often—particularly for financial transactions or sharing confidential information—scammers have increased their activity. Just last year, people received an average of 14 spam and fraud calls each month, which resulted in serious financial losses.

Spam, fraud, and financial losses



United Kingdom

6.6B total spam and fraud calls

12 per user per month

£521.30 Average lost by people who were scammed in 2021



Spain

8.9B total spam and fraud calls

20 per user per month

€387.03 Average lost by people who were scammed in 2021



France

12.4B total spam and fraud calls

21 per user per month

€264.57 Average lost by people who were scammed in 2021



Germany

5.9B total spam and fraud calls

6 per user per month

€250.43 Average lost by people who were scammed in 2021

Trend 6:

Scam and spoof calls are increasingly bad for business.

It's not just high-volume scammers who are finding success on the voice network. It's sophisticated scammers, too—the ones who exploit consumers by impersonating or spoofing legitimate businesses. In 2021, 62% of survey respondents said they had received a call they believed to be a scammer impersonating a business.

Let's look at the data on impersonation calls:

60% of respondents received an impersonation call

The most impersonated industries:



Financial Services



Utilities



Insurance

Impersonated calls negatively impact how consumers perceive businesses:

30%

Are now suspicious of calls from the impersonated business

21%

Lost trust in the impersonated business

20%

Negatively affected their view of the impersonated business

13%

Switched brands and no longer do business with the impersonated business



Impersonating French utilities

60% of French respondents said they received an impersonated call last year with a distinct trend: 25% of these calls were reportedly impersonating French utilities—that's nearly three times more than the average.

Trend 7:

Many businesses don't know how their calls are delivered.

Three of the biggest challenges that businesses face on the voice network is knowing:



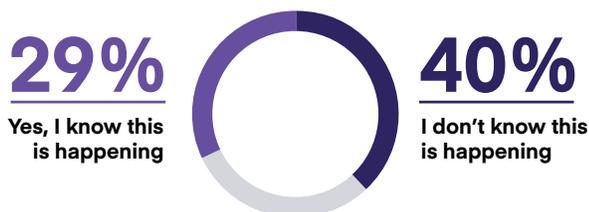
- How their calls are being labeled ("spam risk" or "potential fraud")
- If their brand is being impersonated by scammers
- If their phone numbers are being spoofed

The lack of transparency on the voice network has resulted in the majority of businesses not knowing how their calls are being delivered or how their phone numbers are being used.

Do you know if your calls are being marked as spam, or if your numbers are being hijacked by impersonators or scammers?



Do you know if your business name has been used in scam calls by impersonators?



Do you know if your telephone numbers are being hijacked to run scams?



Trend 8:

Consumers are screening unidentified calls more than ever before.

You receive a call from an unidentified number. Do you answer it or ignore it? If you ignore it, you're in good company. The vast majority of consumers—a whopping 94-percent!—said they think unidentified calls are fraudulent. This creates a near-impossible obstacle for businesses that don't brand their calls to overcome. No matter how many times you dial, your customer may never pick up.

While ignoring these unidentified calls helps consumers protect themselves from potential fraud, it also causes them to miss important calls from people or businesses they may want to talk to.

Which are the most frustrating calls to miss because they are unidentified?

Consumers across Europe said:



Insurance agent or company
19%



Banks and lenders
16%



Family and friends
15%



Work
15%



Healthcare providers
12%

What's the most frustrating unidentified call to miss in each country?

 Healthcare providers 

 Retail companies 

 Banks and lenders 

 Work 

Trend 9:

Businesses are bearing the brunt of unanswered calls.

As voice becomes more critical to how businesses interact with consumers, the negative impacts of not being able to reach customers by phone are widespread. Overall, nearly half of businesses reported negative financial impacts from not being able to connect by phone, while just one-sixth of businesses said there was no financial impact. To get specific, businesses reported that sales volume was the most negatively impacted area, followed closely by productivity, customer retention and satisfaction, and sales velocity. And to underscore this challenge: Half of all businesses reported that they had lost a customer by not being able to reach them by phone.

Industry spotlights:

Finance, Healthcare, Insurance and Retail

What area of the business is most negatively impacted by not being able to reach customers by phone?

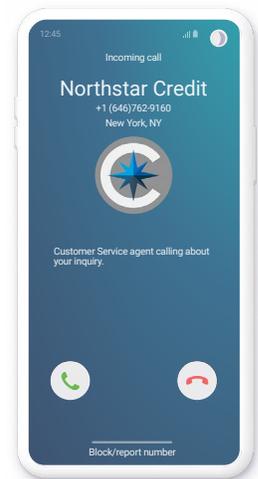
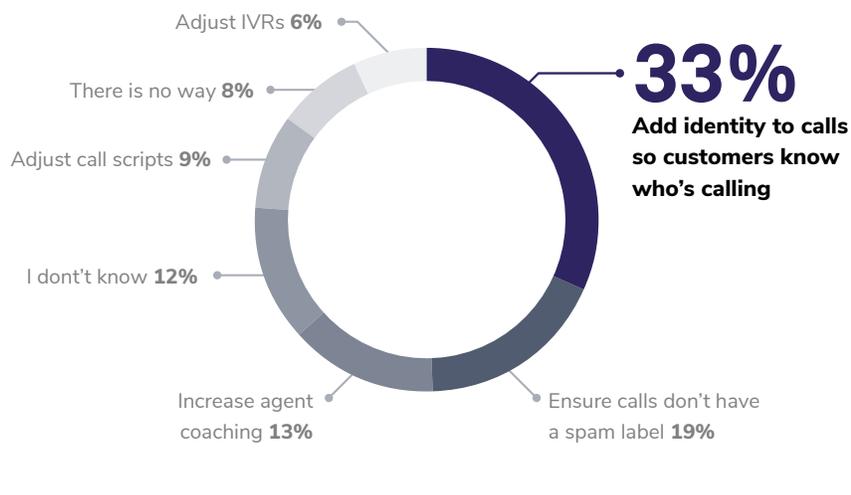
 Finance:	 Healthcare:	 Insurance:	 Retail:
1. Sales volume	1. Customer satisfaction	1. Customer retention	1. Sales volume
2. Sales velocity	2. Sales volume	2. Customer satisfaction	2. Sales velocity
3. Productivity	3. Productivity	3. Sales velocity	3. Customer retention

Trend 10:

Businesses believe branded calls are the solution.

The business professionals who face these challenges on the voice network know that something needs to change. According to respondents, the answer is simple: Add identity to outbound calls. In fact, nearly one-third of businesses think that adding identity is the most effective way to increase answer rates.

What's the most effective way to increase answer rates?



Businesses believe so strongly in the positive impacts of branded calls that nearly every business surveyed said they would pay extra for a branded caller ID solution.

Methodology

Market Research

Censuswide conducted a market research survey on behalf of Hiya during the period of December 14-20, 2021. In total, 1,200 business professionals who use a phone frequently as part of their role were surveyed online. In addition, 8,153 consumers were also surveyed online. The survey was conducted in the UK, Germany, France, and Spain. Censuswide abides by and employs members of the Market Research Society, which is based on the ESOMAR principles.

Hiya Data

Hiya’s proprietary data for this report focused on the following countries: UK, Germany, France, and Spain. Hiya’s data is sourced from Hiya’s integrations with wireless carriers and device manufacturers, partnerships with business entities, and the Hiya app. All proprietary data has been aggregated and anonymized.



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Learn more at hiya.com

Hiya is trusted by global businesses, carriers, and consumers to provide secure, engaging connections, and stop unwanted calls. Built on the world's leading Voice Performance Platform, Hiya connects businesses with their customers, helps carriers secure their networks, and protects people from spam and fraud calls. Hiya's SaaS applications, Hiya Connect and Hiya Protect, serve more than 200 million users, power services like AT&T Call Protect and Samsung Smart Call, and deliver voice performance insights to businesses across the globe.