



What people think,
feel and do



ServiceNow: Spain



Key findings

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Project details

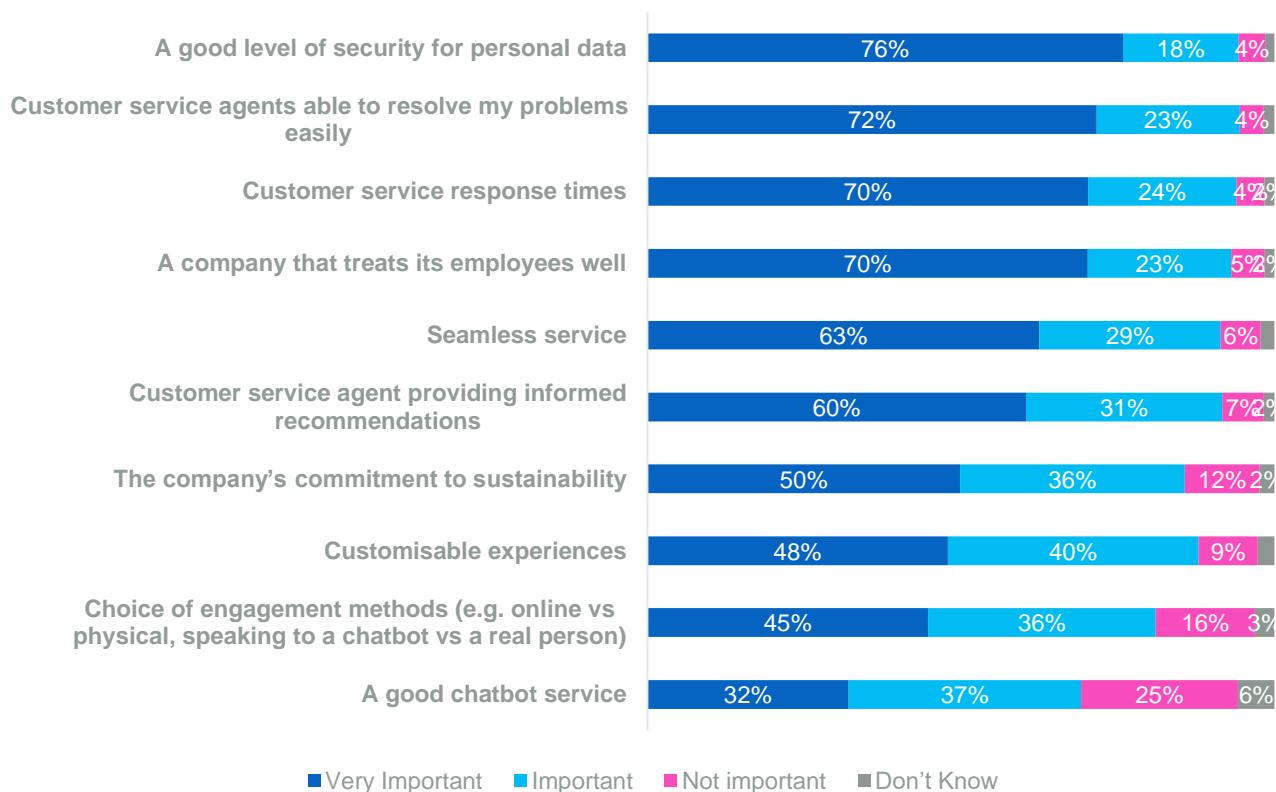
PROJECT NUMBER	OP25037
PROJECT NAME	ServiceNow: Spain
SAMPLE	2,000 Nat Rep Spanish Adults
FIELDWORK DATES	3 rd – 11 th January 2024

Customer Service

A good level of security for personal data is most important when dealing with companies

When using a company, a good level of security for personal data is deemed to be the most important, along with customer service agents being able to resolve problems easily and customer service response times (each 94%). This is followed by a company that treats its employees well (93%). Meanwhile, having a good chatbot service is the least important with seven in ten (69%) deeming this important.

Importance of different aspects when using a company



In addition to this, nine in ten say it is important that companies offer quick, real-time support and offer personalised discounts, product samples or service trials (both 89%). Offering the option to use the channel of their choice (88%) and offering self-serve customer service options, like creating returns without interacting with a human or bot (81%) are also deemed important.

Looking at specific industries, healthcare is viewed to have the best customer service (39%), followed by retail (36%), and consumer technology (31%). The full ranking falls out as:

- Healthcare 39%
- Retail 36%



- Consumer technology 31%
- Telecoms 22%
- Traditional banking 18%
- Enterprise technology 15%
- Home utilities 15%
- Government services 7%
- Fintech 4%

Looking at the new customer service laws that are due to come into place in Spain aiming to guarantee consumers' basic rights by ensuring a more personalized and effective service in providing information, addressing incidents, and resolving complaints, over nine in ten (92%) believe it will have some benefits for them. Limitations on waiting time are viewed to be the biggest benefit (37%), followed by limits on automatic answering machines (35%) and training of customer service staff (33%).

Four fifths are less loyal to brands than they were 2 years ago

Four fifths of Spaniards (85%) say they are less loyal to brands now than they were 2 years ago. Financial reasons, preferring to buy the cheapest option now is the main reason for this (36%), along with an increase in competition (28%), a disappointing experience with companies (16%) and influence from social media (15%).

Looking as to what brands should be offering in the next 12 months, price reductions (39%) would be most popular, followed by improving their after service (30%), deepening customer relationships in person and offering a greater range of products and services (both 27%).

Spending

Three fifths are spending more than they were 12 months ago

Three fifths of Spanish adults (60%) say they are spending more this year than they were 12 months ago, with this particularly prominent amongst those aged 18-34 (63%). Meanwhile, 17% are now spending less, and 22% haven't seen any change in the amount they spend.

Rising costs is the main reason given for those who are spending more (58%), along with trying to be more sustainable (19%), prioritising self-improvement (17%), and a change in circumstances meaning they need more products (14%). The top reason for spending more is also the main reason for those who are spending less, half (50%) are cutting back due to the increased cost of living, while 29% say their circumstances have changed and they can no longer spend the same amount. Other reasons for spending less now are prioritising saving and investments (26%), having a reduced salary (19%) and prioritising second hand purchases to be more sustainable (12%).



AI

Consumers don't engage with AI as they don't want it to replace human jobs

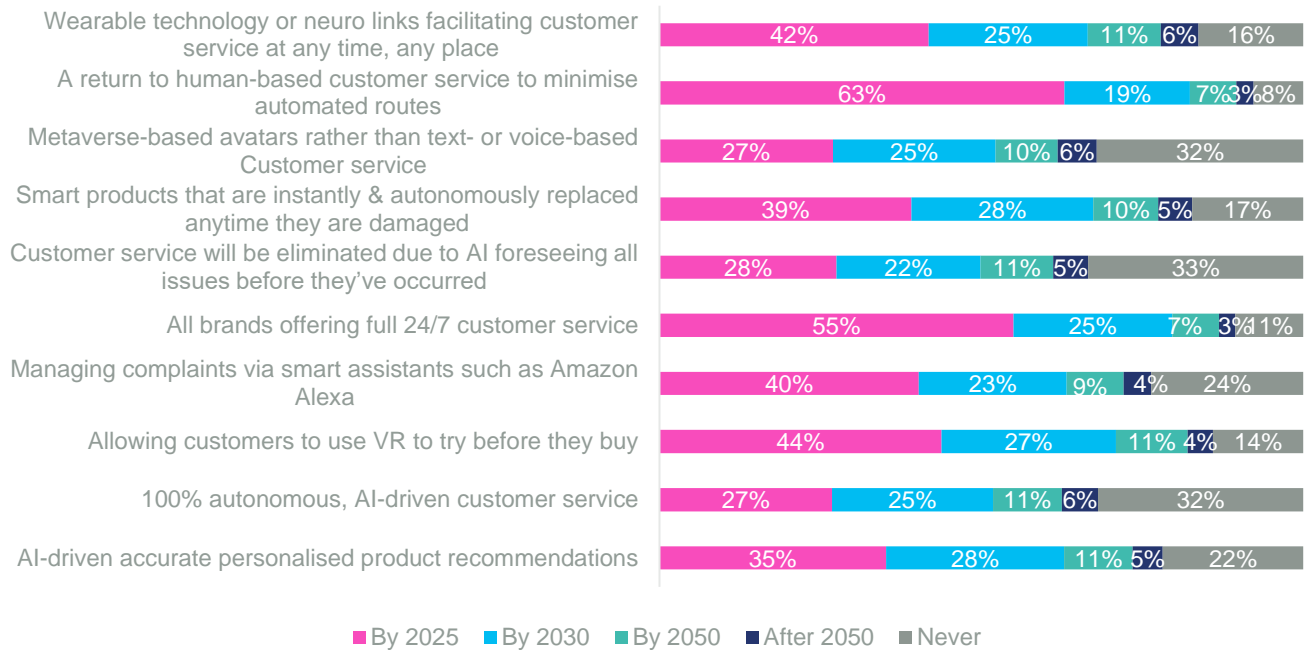
Customers opt for different channels of customer service depending on what it is they are contacting about. Intelligent search engines and self-service or self-help guides are deemed the best for general information (both 29%), whereas if consumers are looking for support problem solving, they would opt for a phone call with a human representative (36%).

CX CHANNEL	TOP USE
Chatbot	General information 22%
Online chat with human	Problem solving / troubleshooting 34%
Intelligent search engine	General information 29%
Email with agent	Problem solving / troubleshooting 28%
Automated phone line	General information 21%
Phone call with agent	Problem solving / troubleshooting 36%
Social media	General information 27%
Self-service / self-help guides	General information 29%

For those who wouldn't engage with a brand using AI or generative AI for at least some services, not wanting it to replace human jobs is the main reason (36%). This is followed by a lack of personalisation (31%), not trusting the answer to be correct (24%) and wanting a genuine apology or answer rather than a formulaic response (20%).

Looking ahead to the future of customer experience views differ on what will become the norm. A third (33%) would never want to see customer service will be eliminated due to AI foreseeing all issues before they have occurred, while three fifths (63%) would like a return to human-based customer service to minimise automated routes by next year.

When consumers want to see different CX levels become standard practice



About Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people **think, feel** and **do**. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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