

Customer Experience Management Research, 2024

A Transforming Ecosystem that Maintains
Appetite Despite Challenges

November 2024



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Chairperson's Message

Dear Readers,

Following a year marked by transformation and uncertainties, the importance of customer experience management has become more evident than ever. Our 2024 research delves into the technological, economic, and cultural shifts reshaping the dynamics of customer experience. This report is not merely an analysis; it also serves as a guide for professionals and leaders in the sector.

The findings of our research once again highlight how rapidly and intricately customer expectations are evolving. The fact that only 8% of interactions are currently preferred to be AI-based demonstrates that the full potential of this field remains untapped. Meanwhile, the projection that 92% of companies plan to serve new markets within the next 12 months underscores that customer experience management is no longer a local endeavor but a global competition.

Despite economic challenges and high inflation, the customer experience sector maintains its growth ambition. The 1% increase in the number of customer representatives in 2024 demonstrates this resilience, while simultaneously drawing attention to the decline in women's employment. This situation underscores the critical importance of policies supporting diversity and equality within the sector.

Another significant highlight from our research is the role of technology. With 88% of participants identifying the use of innovative technologies in customer experience as their top priority, it is clear that the future will be shaped in this domain. However, challenges such as information silos and the lack of integration between departments reveal the need for strategic planning to implement technological transformation successfully.

This year's report provides a detailed examination of the opportunities that technologies such as AI-powered chatbots, data analytics, and omnichannel customer engagement solutions present to the sector. Moreover, it explores how companies differentiate themselves amidst economic uncertainties by balancing operational efficiency and customer satisfaction.

We are in a period where the boundaries of the customer experience management ecosystem are expanding. Today, this ecosystem requires a broad collaboration network encompassing technology provider, design professionals, consulting firms, and educational institutions. As the Customer Experience Management and Technologies Association, we continue to move forward with the mission of guiding all stakeholders in this ecosystem.

We extend our gratitude to all our members and valuable stakeholders in the sector who supported us in creating this comprehensive study. We hope that our report offers a new perspective in the field of customer experience management and serves as an inspiration for sectoral development. Let us come together to design more innovative and impactful experiences for our customers.

Sincerely,

Banu Hızlı, Chairperson of MDYD Board of Directors



Customer Experience Management Research, 2024



Customer experience stands as one of the most critical factors enabling companies to excel in today's rapidly evolving and increasingly complex business landscape. The pace of technological advancements reshapes customer expectations, setting new standards. Technologies such as artificial intelligence, big data analytics, and automation are redefining customer interactions, making it a strategic imperative for companies to adapt to this transformation. At this juncture, treating customer experience not merely as an operational process but as a strategic growth area becomes crucial.

Our 2023 **"Next-Generation Customer Experience Management Research"** provided a solid foundation for understanding the current state and key dynamics of the industry. This research presented a comprehensive roadmap to analyze how businesses can navigate critical factors such as economic fluctuations, technological transformations, and rapidly changing customer expectations. The 2024 research builds on the findings from last year, aiming to examine industry changes with new insights while serving as a resource for updated solutions and strategies.

This year's research includes evaluations and forecasts under five main headings. Last year's research served as a starting point for identifying the cornerstones of change in the industry and the factors enabling fundamental shifts in customer experience management. This year, we sought to present an analysis that sheds light on the future of the industry by updating the data and exploring different themes. The report addresses technology-driven transformation processes, the impact of economic uncertainties on the sector, and how customer experience strategies evolve under these conditions, enriched with expert opinions.

As with last year, we aim for this year's report to serve as a guide for professionals and leaders in the industry. We aspire for this updated research to inspire professionals in the sector and guide them in taking impactful steps to differentiate their customer experience management. We hope this research, which highlights the critical role of customer experience management in companies' growth and competitive strategies, will serve as a strong reference for the future of the ecosystem.

Research Methodology

As part of the research, **a comprehensive survey and in-depth interviews were conducted.** The survey sample includes companies that provide customer experience management services under the names of call centers, customer contact centers, and customer experience centers.

The in-depth interviews reflect the perspectives of participating call centers and industry players, as well as technology service providers, and consulting, training, and research firms.



104
Companies
Survey Sample



10+
In-Depth Interviews
with Industry
Executives



1 Overview of 2024: Sustained Appetite for Growth Despite Challenges

2024 stands out as a year where the impacts of global high inflation in the post-Covid-19 period continue to be felt. During this time, Türkiye has taken steps to return to conventional economic policies, focusing on a stronger Turkish lira. While contractions have been observed in many sectors, these effects have not yet led to a significant decline in the field of customer experience management. Over the past year, a 1% increase in the number of customer representatives has been recorded.

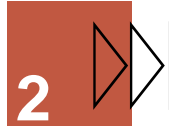
According to survey results, 20% of companies aim to increase the number of employees in their customer departments, while growth in value-added areas through process optimization and more efficient use of technology remains a top priority. Additionally, 92% of participating companies plan to expand services into new markets within the next 12 months. This trend highlights the sector's sustained appetite for growth despite the challenges.



4 Effective and Efficient Use of Artificial Intelligence in Competition

Artificial intelligence (AI) offers significant opportunities for companies to enhance operational effectiveness and efficiency in today's competitive business environment. According to the survey results, IVR-based calls (29%) and call-based interactions (27%) stand out as the most common use cases in 2024, while proactive AI-based interactions are preferred by only 8%.

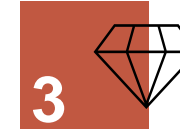
The high costs and complex integration processes of AI technologies require companies to adopt a more strategic and efficient approach when planning these investments. Looking ahead to 2025 and beyond, the more proactive and widespread use of AI is expected to strengthen companies' competitive advantages.



2 Looking Ahead to 2025: How Will the Customer Experience Ecosystem Evolve?

In 2025, with slowing economies, companies are expected to focus on new value creation areas and manage their existing costs more effectively. Investments in customer management, in particular, are projected to offer high return potential during this period.

Over the next decade, the strategic importance of this area is expected to increase significantly. Companies aiming to differentiate in customer experience will need to better understand their customers and leverage all available technological capabilities to optimize costs. With this approach, brands that enhance customer satisfaction while achieving operational efficiency are expected to stand out.



3 The Need for Differentiation for Effective Competition

In globalizing markets, especially in service exports, the increasing intensity of competition is pushing companies to go beyond low-cost advantages. Sustainable success can only be achieved through a unique value proposition. In this context, customer experience emerges as one of the strongest tools for differentiation in competition.

Our research reveals that quality expectations rank as the top priority in outsourced services, with a rate of 88%. In service exports, factors such as cultural differences and the challenges of remote communication highlight the importance of a customer-centric approach. Companies that overcome these challenges and deliver experiences exceeding expectations are rewarded with customer loyalty and positive referrals. These elements form the foundation of sustainable growth and competitive advantage.



5 Value-Oriented Approach: The BPO Transformation Journey

The BPO transformation journey stands out as a strategic process that not only provides cost advantages but also aims to achieve operational excellence, innovation, and superior customer experience. This transformation encompasses a series of critical steps, including effective use of technology, strategic consulting, process automation, data analytics, agile methodologies, and talent development.

A successful BPO transformation is expected to reshape business processes by bringing agility, scalability, and a culture of continuous improvement to companies. This approach enables organizations to remain competitive and achieve sustainable success in the rapidly evolving business world of the future.

1

Overview of 2024: Sustained Appetite for Growth Despite Challenges

Customer Experience Management in 2024

Despite a slowing economy, the sector has achieved a real growth rate of 1%

Despite the challenging macroeconomic conditions of 2024, the sector has managed to maintain its size

Total Number of Customer Representatives



Total Number of Employees Including Support and Managerial Staff

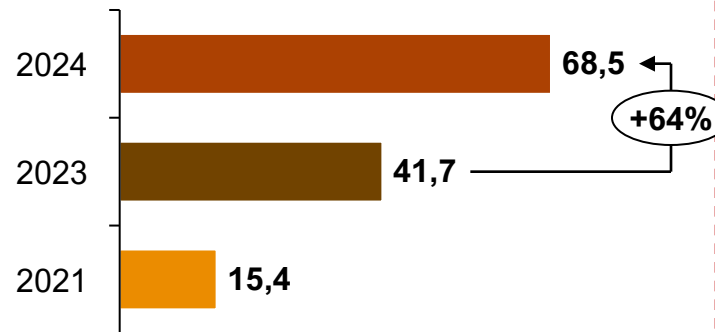
167.620

Average Age

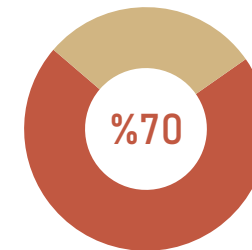
Considering the slowing economy and the traditionally high employee turnover rate in the sector, a +2-point increase in the average employee age has occurred as expected.

29 (~+2)

Market Size (Billion TL)



Female Employment Rate



As confirmed by the 2024 data, similar to 2023, the Customer Experience Management ecosystem stands out as one of the leading sectors contributing to female employment in Türkiye, with over 70% female workforce representation.

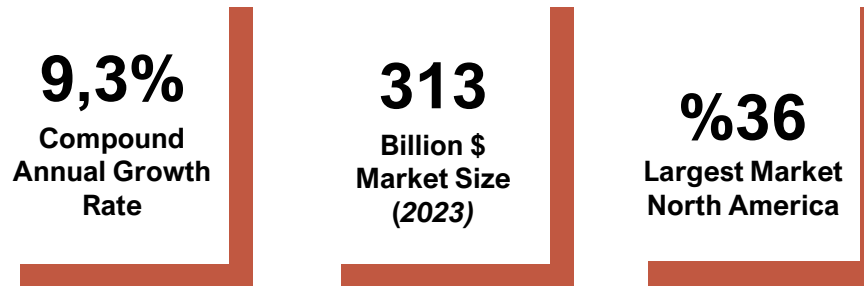
An evaluation based on Turkish lira revenues reveals a notable growth rate of 64%. However, considering the high inflation environment in Türkiye and the average data from the past 12 months, real growth stands at approximately 1%. This growth appears to align with changes in the number of customer representatives.

Global Outlook of the Ecosystem

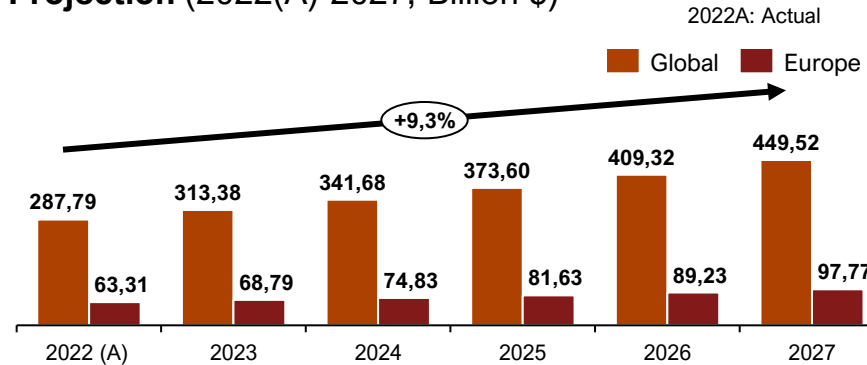
Post-COVID economic recovery continues to drive robust growth globally

On a global scale, the customer experience management market continues to sustain its rapid growth

Global Customer Experience Market



Global and European Customer Experience Market Size Projection (2022(A)-2027, Billion \$)



In 2022, the customer experience market size was recorded at **\$288 billion**, and it is projected to reach approximately **\$450 billion** by 2027, growing at a compound annual growth rate (CAGR) of **9.3%**. **Europe**, holding a **22.0%** share of the global market, reported a market size of **\$63 billion** in 2022. This figure is expected to grow by **9.1% annually**, reaching approximately **\$98 billion** by 2027.

Overview of the Global Customer Experience Market

Drivers of Growth

The adoption of **cloud-based solutions** for enhanced scalability, **integration of AI/ML** for automation, and the provision of omnichannel support to improve customer experience are among the key drivers of growth.

Challenges

Maintaining acceptable service levels (ASA), addressing unresolved queries, and the ongoing need for **investments in automation and CRM solutions** are the primary challenges facing the customer experience market.

Focus Areas

Priorities for CFOs and CTOs include investments in information technology to enhance **customer satisfaction and brand loyalty**, along with a focus on security and **data protection**.

Global Trends



Omni-channel Support



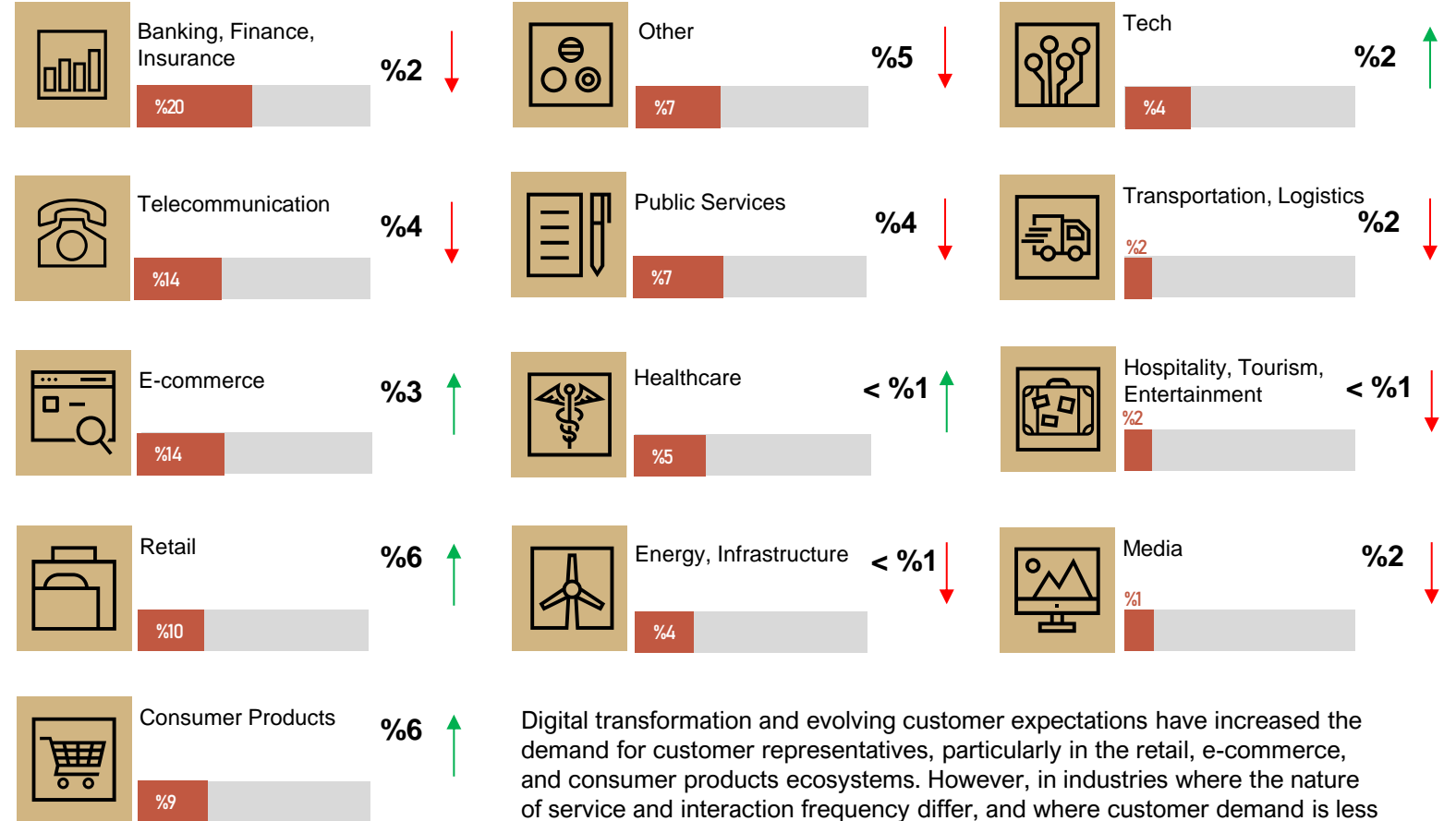
Cloud-Based Contact Centers



Customer-Centric Service Approach

Number of Customer Representatives by Industry

20% of customer representatives serve in the Finance ecosystem; despite the slowdown in e-commerce, retail continues to grow



Digital transformation and evolving customer expectations have increased the demand for customer representatives, particularly in the retail, e-commerce, and consumer products ecosystems. However, in industries where the nature of service and interaction frequency differ, and where customer demand is less frequent or urgent, this need remains relatively lower.

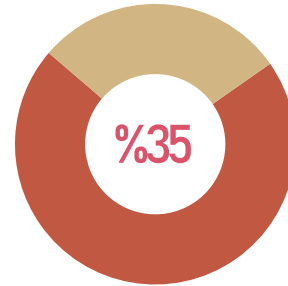
Companies are prioritizing growth through service exports and value-added work rather than increasing the number of customer representatives, focusing on more strategic allocation of resources.

When consolidated, the E-commerce, Retail, and Consumer Products sectors account for one-third of the employment within the ecosystem

Türkiye, despite its macroeconomic divergence the appreciation of its labor force, has managed to maintain the volume of services provided in foreign languages

Services Provided in Foreign Languages and Export

High-quality service has enabled the preservation of export volume despite the appreciated Turkish lira and rising costs; however, this situation is not sustainable in dynamic markets with open competition in the long term



Percentage of Companies Providing Services in Languages Other Than Turkish

10.365

Total Number of Customer Representatives Providing Services in Foreign Languages

One in three companies provides customer experience management services in foreign languages. Six percent of the total number of customer representatives deliver services in foreign languages.

Foreign Languages Provided in Services

- 1 English
- 2 German
- 3 Dutch

In services provided in foreign languages, inbound call support is the most common at 100%, followed by outbound call support at 47%. The least common is WhatsApp message management at 21%.

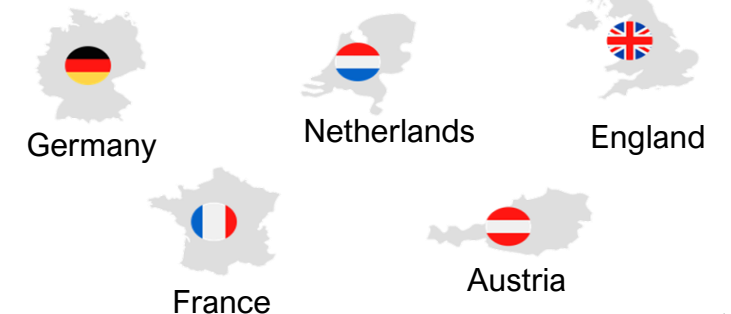


BPO players in Türkiye have managed to reflect the appreciated Turkish lira and rising costs in their pricing, thanks to the quality of services they provide. However, the credit extended to us by our clients is, of course, not limitless. At this point, we can say that our acquisition of new foreign-language projects has slowed down. A properly valued Turkish lira is crucial for us, just as it is for all exporters.

Sector Representative



Countries Leading in Türkiye's Exports



Overseas Clients / Language Proficiency

Languages Other Than Turkish and Overseas Clients

Operations that prioritize the effective employment of the Turkish diaspora succeed in standing out in service exports

Distribution of Customer Representatives Serving Overseas Clients by Language

Customer Representative Distribution (%)

1	German	43
2	English	24
3	Arabic	11
4	Dutch	8
5	Other	14

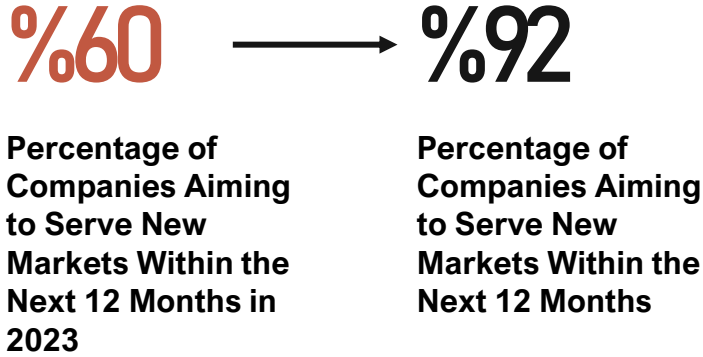


- Although Arabic-speaking countries are among the important target markets, dialect differences in Arabic pose challenges to competition.
- Providing customer representative services for relatively small but significant markets like Dutch highlights Türkiye's flexible operational capacity. This enables the utilization of niche market opportunities in outsourcing.

An increasing number of companies maintain their appetite for growth through expansion into new markets, but they remain cautious due to the "new" economy

Expansion into New Markets

The ecosystem is ambitious about expanding into new markets with technological support and quality, but the macroeconomic outlook must support this appetite.

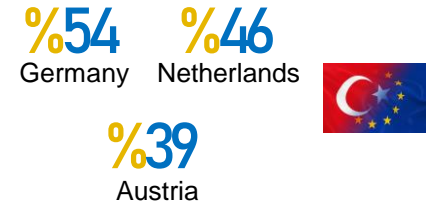


This finding indicates that Turkish companies aim to secure a strong position in line with their growth strategies in international markets.

For companies, making strategic investments to optimize customer experience and embrace digital transformation is crucial for adapting to new market conditions during this process.



In Türkiye, the focus on providing English-language services makes the UK the primary preference when it comes to new markets.



Countries with the highest concentration of the Turkish diaspora also stand out in market expansions. When consolidated, 2 out of every 3 players plan to operate and provide services in these regions.



The United States stands out as an important target market, despite having low current export figures and the time zone barrier.

2

Looking Ahead to 2025: How Will the Customer Experience Ecosystem Evolve?

What's on the Agenda Heading Into 2025?

On leaders' agendas, more than ever before, are employee management, the integration of new technologies into processes, and adapting to changing customers

While new technologies generate excitement, optimizing employee turnover rates stands out as the most critical agenda item

Source: OECD, IMF, PwC Analysis

High Employee Turnover

Employees are struggling to keep up with technological changes and new customer demands. Due to a lack of training, productivity is declining, and employee turnover rates have increased.

The turnover rate of the new generation of employees, who expect more flexible working hours, is rising. In 2024, the percentage of employees working entirely from the office increased from 23% to 29%, significantly raising the 'turnover' rates.

With the minimum wage remaining stable in 2024, customer representatives are turning to jobs and sectors where they can balance their income throughout the year.

Understanding the Changing Customer

Understanding customer demands is critical; it is essential to keep up with rapidly changing expectations. Capturing this change and quickly adapting to digital channels and artificial intelligence will provide a competitive advantage.

Customers' increasing selectivity in spending may prioritize brands that offer efficient, personalized experiences.

Slow Progress in Omnichannel Usage

The lack of interdepartmental integration within companies may fail to meet the expectation of a 'seamless customer experience.' For instance, having customers repeat their issue when transitioning from a chatbot to a live representative can create frustration.

In the absence of data, effective customer experience management is not possible through the human-technology framework alone.

As competition intensifies, brands must optimize the customer experience. Companies that cannot offer integrated solutions may lose market share to competitors who adapt more quickly.

Siloed Information and Data

The lack of information sharing between departments makes it difficult for customer representatives to resolve issues quickly.

While the adoption of artificial intelligence is becoming more widespread, without integrated data, results may not meet the desired level, and the customer experience may be negatively impacted.

It is expected that information silos will slow down Customer Experience Management operations, increase costs, and reduce customer satisfaction.

Artificial Intelligence, and Rapid Return on Investment

Without sufficient in-house expertise, the rapid adoption of artificial intelligence can pose risks of misaligned projects and costly mistakes.

While artificial intelligence has the potential to optimize operations and reduce costs, an excessive shift toward automation in processes may negatively impact the quality of customer interactions and service delivery.

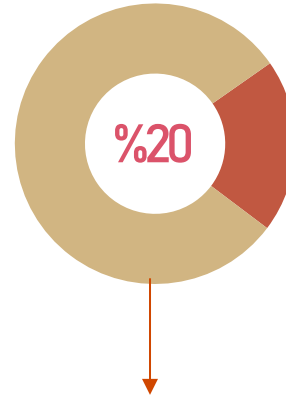
Failing to maintain this balance could lead to a decline in customer satisfaction and weaken brand loyalty.

The Emergence of New Business Models

Models focused on efficiency and employee engagement, with an emphasis on quality, could bring a new dynamic to the ecosystem; however, legal regulations are still needed for effective transformation

Driven by challenging economic conditions, new business models focused on employee engagement and quality are emerging; relevant legislation could further support and expand these models

Percentage of Companies Aiming to Increase the Number of Employees in the Customer Experience Department



Only **47%** of companies aiming to increase the number of employees in the customer department plan to hire in the operational support area, while the remaining hires are planned for Design, Governance, Analytics, Processes, and Technology areas.



Due to the challenging economic conditions, **customer representative profiles** are changing. Many individuals, such as students and housewives, who do not require full-time employment, are securing jobs by working **part-time** and invoicing the company for the hours worked. This new system is particularly attracting a lot of interest from **Turkish expatriates**.



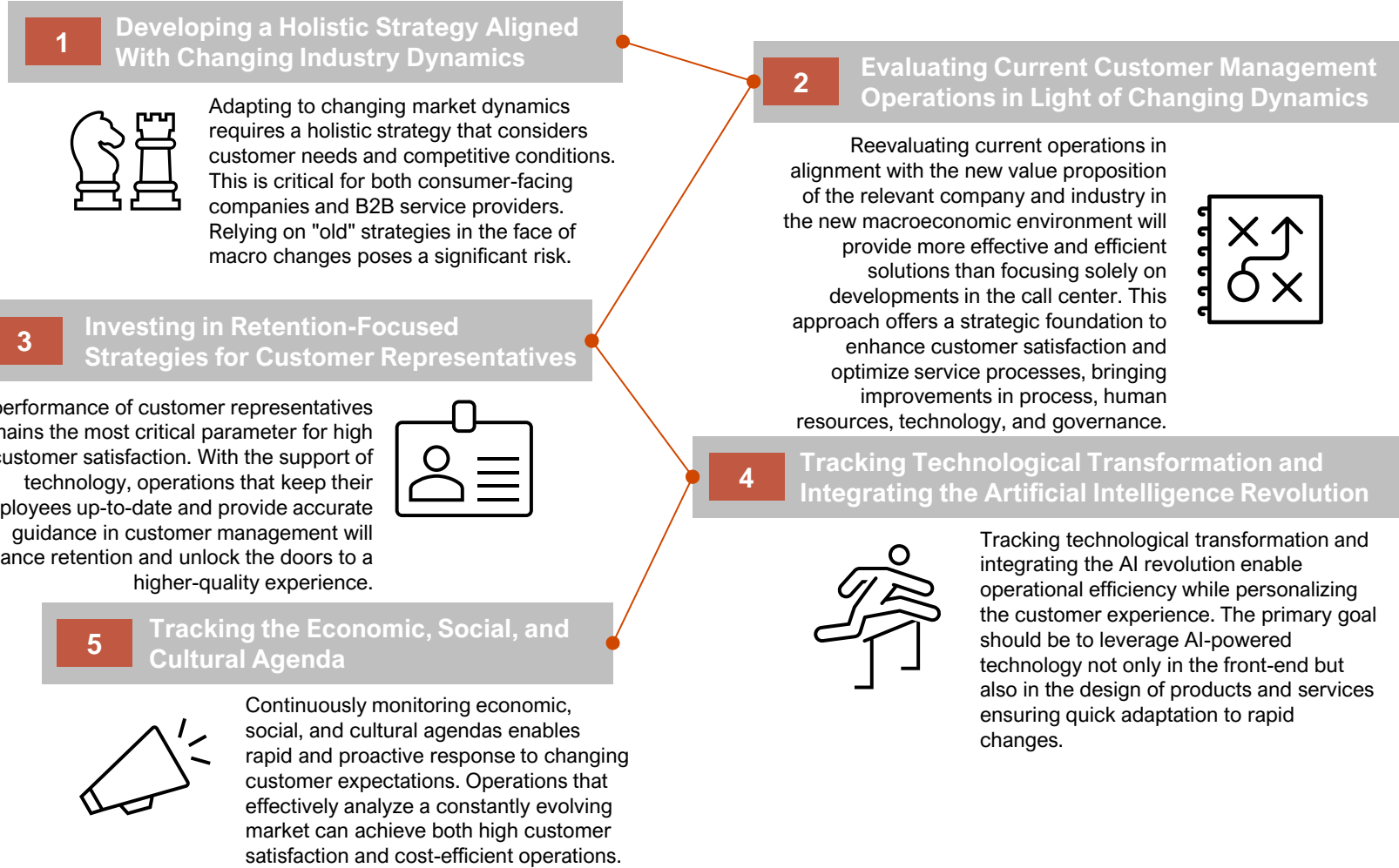
Amid economic uncertainties, one of the key objectives for 2025 is **reducing operational costs**.

The effective use of artificial intelligence technology will enable full automation of certain functions, while in some applications, AI is expected to become the greatest assistant to customer representatives with a focus on quality.

Approaches to Overcoming Challenges

In response to the concerns defining 2025, ecosystem leaders agree on five interconnected approaches

It is possible to overcome the anticipated challenges in the Customer Experience ecosystem with effective approaches



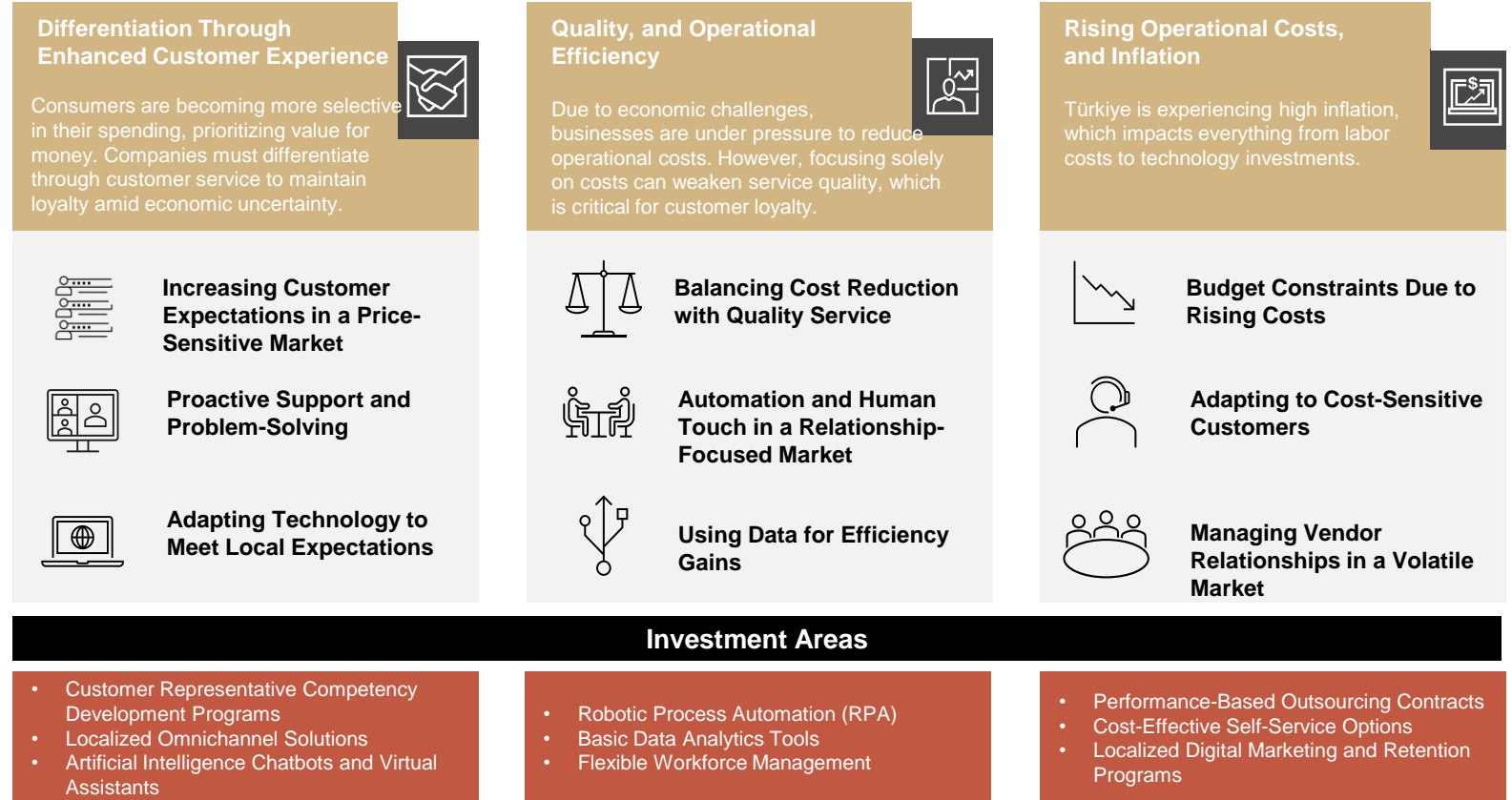
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The Need for Differentiation for Effective Competition

Economic conditions make operational efficiency essential for competition; however, targeting value-oriented cost distribution is crucial

Standing Out in Competition

Companies are looking for ways to economically present the competencies that stand out in competition within the rules of the new economy; however, there is no one-size-fits-all solution, and success will depend on setting the right priorities



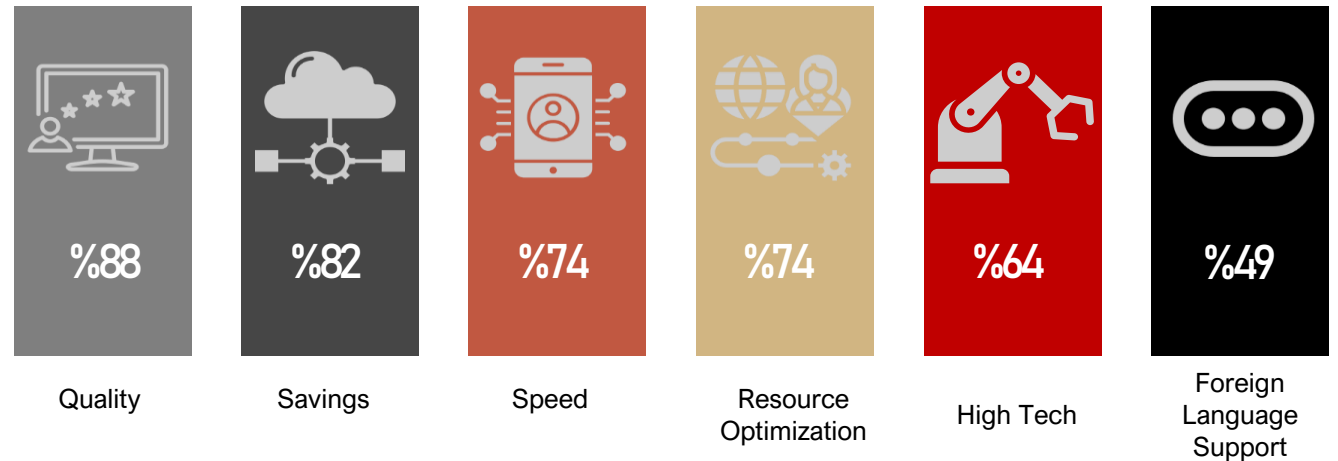
Source: The Wall Street Journal, PwC Analysis

Expectations in Outsourcing

The expectations underlying the decision to use outsourcing in their processes have not changed for companies; however, the number of those turning to outsourcing for rapid adoption of advanced technology is growing quickly

Companies that resort to outsourcing are primarily focused on quality and cost savings; however, the "rapid" adoption of technology is also an emerging initiative

Expectations of Real Sector Players Regarding the Services They Plan to Acquire for Customer Experience Processes



Real sector representatives highlight quality expectations as the most important factor in customer experience processes at a rate of 88%, while speed, which significantly contributes to customer satisfaction, ranks high at 74%.

Due to the challenging economic conditions, cost savings, resource optimization, and advanced technology, which can enhance profitability, are among the top 5 priorities.

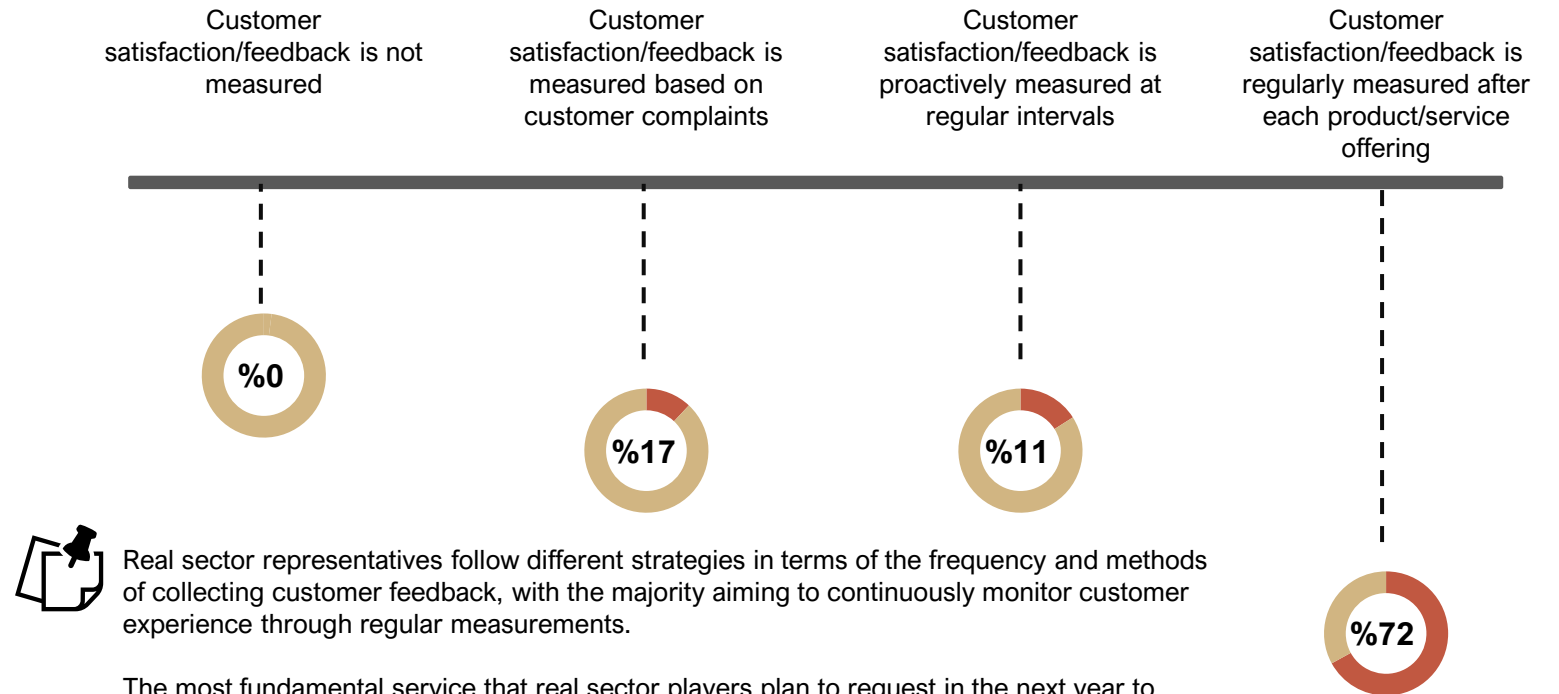
Although the expectation for foreign language support ranks 6th at 49% in 2024, the most significant growth in expectations is expected in this area next year.

Frequency of Measuring Customer Satisfaction

Companies that understand the importance of customer satisfaction in line with their strategic objectives continue to adopt approaches that evaluate, measure, and improve each aspect of customer experience

The percentage of companies that measure every product/service offering with the help of technology has increased, surpassing 70%

Frequency of Measuring Customer Satisfaction by Real Sector Players



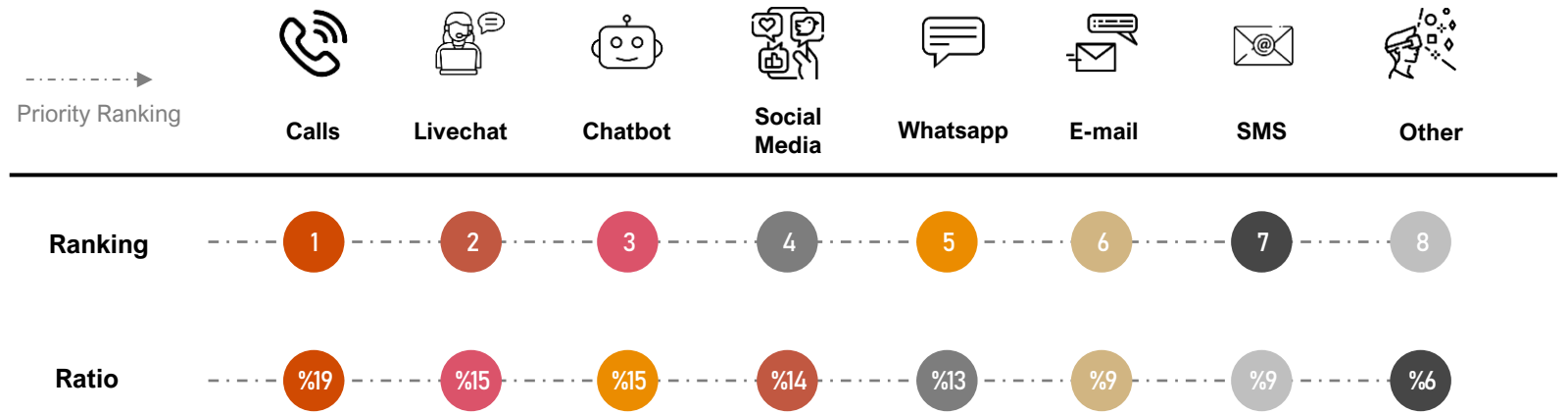
The most fundamental service that real sector players plan to request in the next year to improve customer experience processes is measurement research aimed at understanding "customer satisfaction and demands" (40%).

Priority Customer Interaction Areas

Calls continue to be the leading area of interaction; however, in the medium term, it is anticipated that it will not grow as strongly compared to newer channels, such as live chat and chatbots, which are dominated by the newer generation

Channels such as calls, live chat, and chatbots, where customers can receive instant responses, are expected to remain a priority area

Customer Interaction Areas Expected to be Prioritized in the Next 12 Months



In the next 12 months, customer interaction channels such as calls, live chat, and chatbots, where direct and instant responses can be received, are prioritized. Calls maintain their number one priority, while in 2024, although the order rate for incoming calls decreased from 14% to 9%, the total number of incoming calls grew by 9%, reaching 67%. The increase in sales revenue from incoming calls is one of the key factors in the reduction of outgoing calls. The proportion of Sales & Marketing activities in outgoing calls has decreased from 30% to 25%.

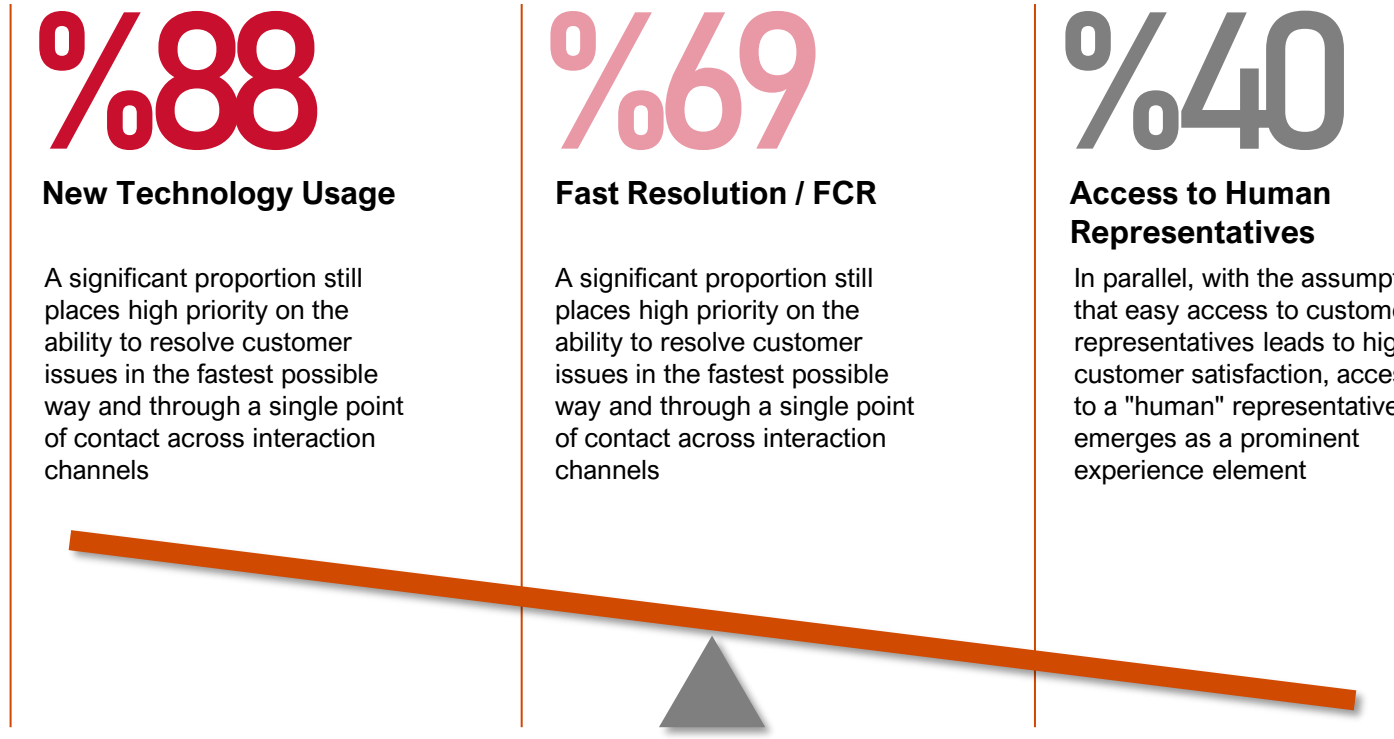
The high priority of live chat, which provides instant feedback, shows that companies are eager to invest more in this area to enhance customer satisfaction. Social media and WhatsApp are emerging as significant interaction areas, while traditional channels like email and SMS are becoming less important.

Differentiation in Customer Experience

As the share of the tech-savvy younger generation in the customer composition increases, services where innovative technology takes center stage, and a consistent experience is provided across different channels are becoming a priority

The use of innovative technology and multiple interaction channels is highlighted by real sector representatives as the key to differentiation in competition

Customer Experience Elements Highlighted by the Real Sector



4

Effective and Efficient Use of Artificial Intelligence in Competition

Artificial intelligence plays a leading role in a rapidly occurring revolution, bringing speed, adaptation, and agility to nearly all industries

Artificial Intelligence in Customer Experience

Artificial Intelligence, a concept that is not actually very new, has recently started to be used in various fields thanks to the standardization of high processing power and the development of advanced language models



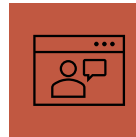
Shorter Response Times

AI-powered chatbots and virtual assistants can instantly handle high volumes of queries, reducing wait times.



Personalization

Artificial intelligence can analyze customer data to provide personalized recommendations and solutions, making interactions more relevant and satisfying.



Usability

AI solutions enable companies to provide 24/7 customer support, serving global customers regardless of time zones.



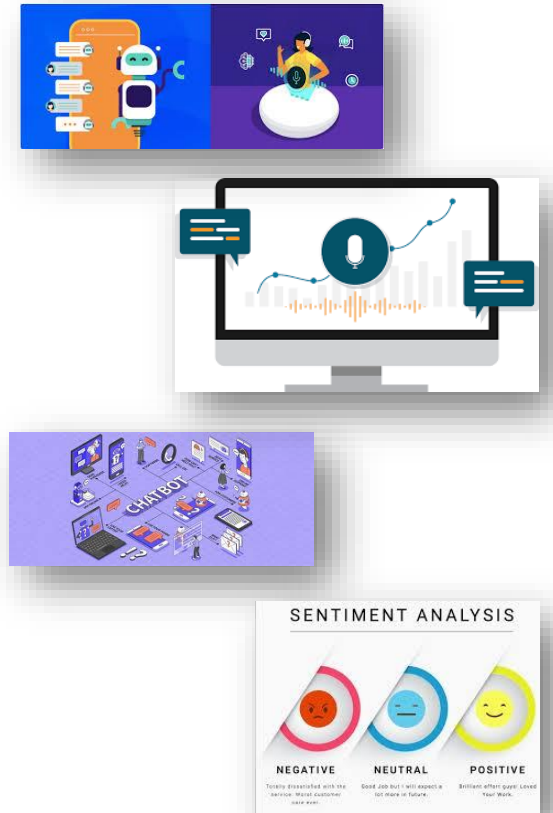
Efficiency

By automating repetitive tasks, AI allows employees to focus on complex and high-value interactions, leading to a more meaningful customer experience.



Cost Savings

Artificial intelligence and automation take over repetitive tasks, significantly reducing labor costs. This allows human resources to focus on more strategic tasks, while operational efficiency improves, and overall costs decrease.



AI Investments in Customer Experience

Major players, including Salesforce, Google, and Microsoft, continue to transform industries with their artificial intelligence products; there is an increasing number of players joining this ecosystem

Global players have demonstrated the potential of artificial intelligence across industries with the products they introduced in 2024



Agentforce

In September 2024, Salesforce introduced "Agentforce," an autonomous AI-based toolset designed to enhance efficiency and customer satisfaction by performing tasks across service, sales, marketing, and commerce.

In October 2024, Salesforce Ventures announced a new \$500 million artificial intelligence fund, increasing its total commitment to AI innovators to \$1 billion over the last 18 months. This fund supports rapidly growing companies and visionary founders shaping the future of artificial intelligence.



Twilio Flex

Experience Center AI Solutions: Twilio's Flex platform integrates with AI solutions such as OpenAI's ChatGPT, Google Cloud's Contact Center AI (CCAI), and Amazon SageMaker to enhance efficiency and support for both customers and representatives.

Introduction to Generative AI



Google Cloud Contact Center AI

Google Cloud is enhancing Customer Experience Management operations effectively by integrating advanced artificial intelligence technologies through its Contact Center AI (CCAI) solutions to improve customer service and operational efficiency.

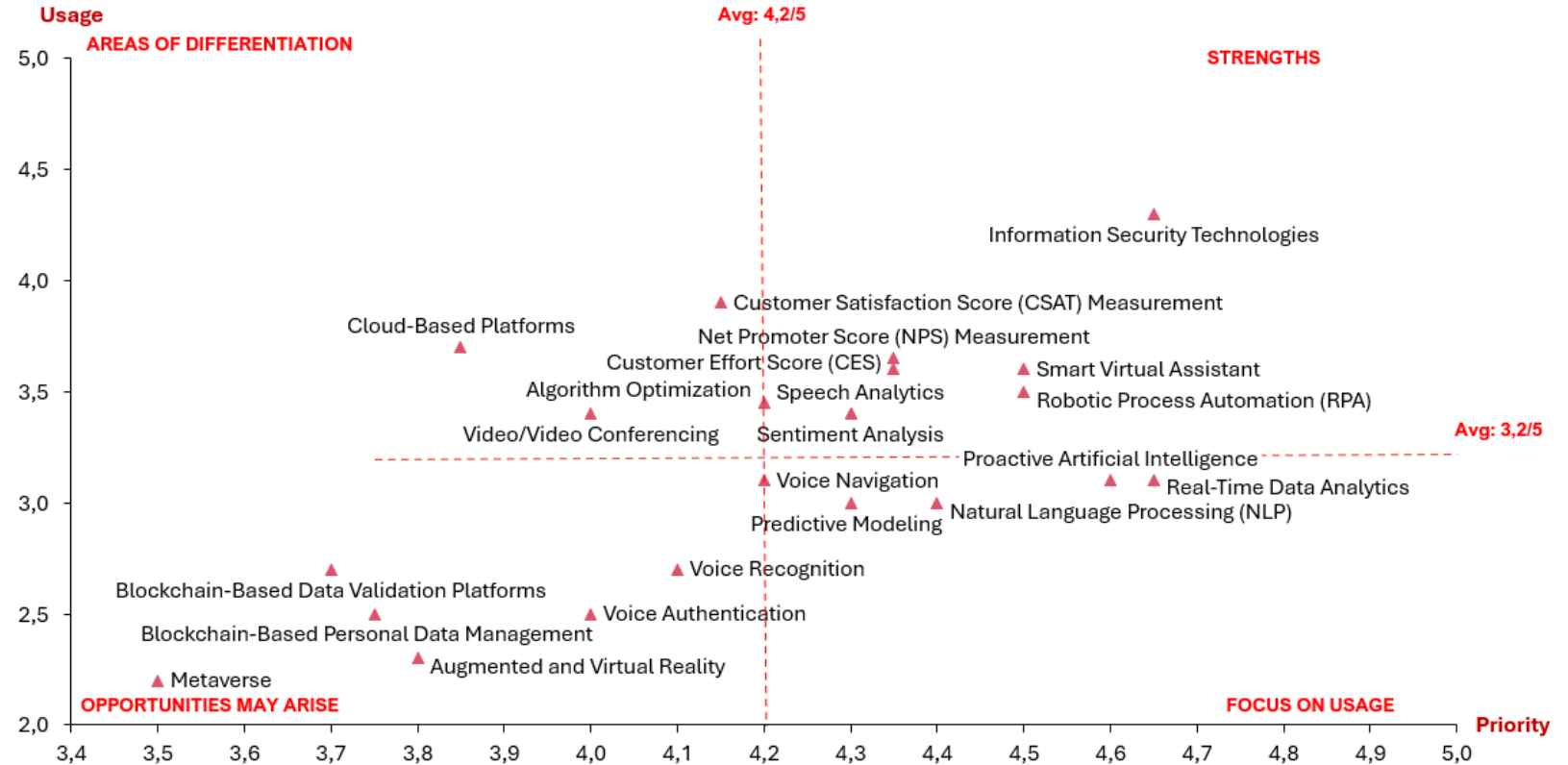
The CCAI platform has been made generally available in several regions, including the United States, Canada, the United Kingdom, Germany, France, Italy, and Spain, with plans for further expansion.



Other Technologies and Artificial Intelligence

Proactive artificial intelligence, intelligent virtual assistants, and RPA applications are strong contenders for the lead role, both in their application areas within customer interactions and in shaping operations

Information security technologies continue to maintain their popularity in both usage and importance, but RPA and AI are rapidly becoming indispensable



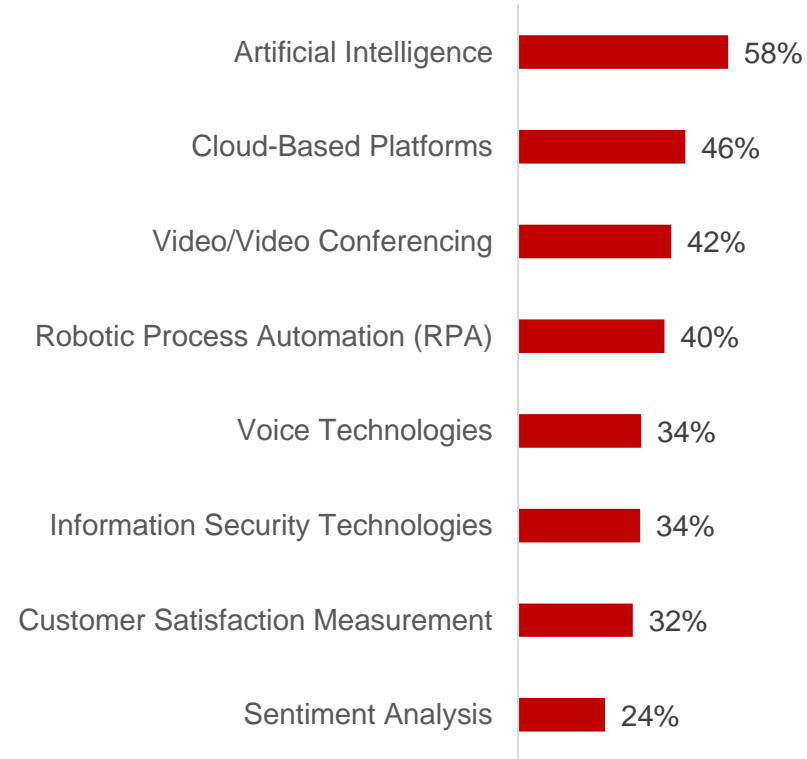
- Compared to 2023, services that stand out in terms of high usage and strengths include Robotic Process Automation (RPA) and Proactive Artificial Intelligence. Although the higher transaction costs of Artificial Intelligence compared to call costs reduce usage rates, progress in this direction is expected as costs decrease.
- Real-Time Data Analytics and Natural Language Processing, although having relatively lower usage levels, are among the most important technologies to focus on.

Investment Plans in Customer Experience Management



When examining the investment plans of leading players, it is evident that artificial intelligence plays an indirect but significant role in many of the top technologies

Artificial intelligence will be a key cornerstone transforming customer experience management as an integrated part of nearly all advanced technologies



- Companies plan to invest the most in Artificial Intelligence technologies and cloud-based platforms.
- Investment plans in RPA and Information Security Technologies remain significant.
- Technologies that measure customer satisfaction and sentiment are also expected to continue receiving investments in the coming years.

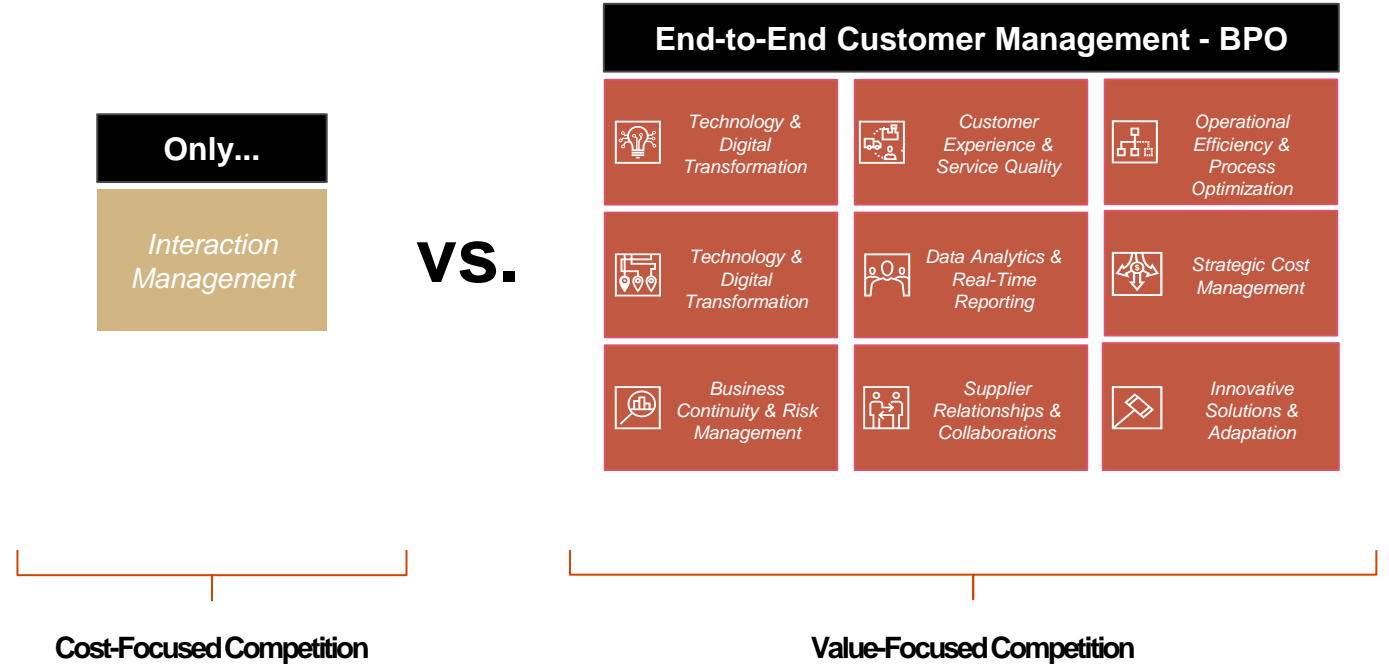
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Value-Oriented Approach: The BPO Transformation Journey

In an environment where macroeconomic realities make cost-focused competition challenging, significant opportunities await companies seeking collaboration across end-to-end business processes and service firms capable of providing this scope

End-to-End Collaboration in Customer Experience

It is clear that cost-based competition focusing solely on defined interactions is no longer viable. Real sector players and service providers should aim for more comprehensive collaborations

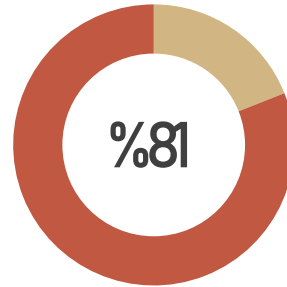


Outsourcing in the Real Sector

It is clear that cost-based competition, focused solely on defined interactions, is no longer viable. Real sector players and service providers should aim for more comprehensive collaborations

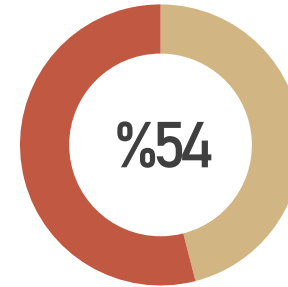
Four out of every five real sector players outsource service support, while this ratio is evenly split in the technology sector

Outsourcing Areas of Real Sector Players



I am receiving service support

Examples of services under the service support option:
Call center services, experience design, etc.



I am receiving technology support

Examples of services under the technology support option: Cloud solutions, data analytics, web chat, chatbot, etc.



Companies now view customer experience services not as cost factors, but as structures that promote growth and generate economic activity for expansion.

Data Demonstrating Potential: The European Market

The European Market, which demonstrates high added value, has surpassed a size of \$40 billion in BPO, with the market being dominated by the United Kingdom and Germany.

Customer Experience Outsourcing Market in Europe



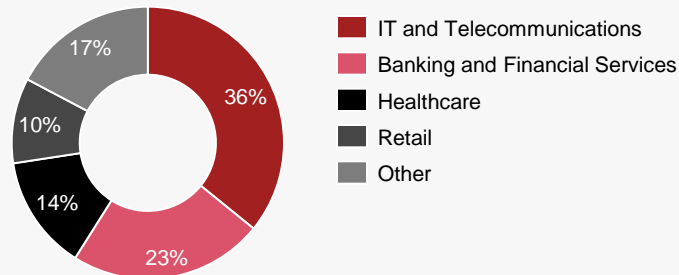
\$40+
Billion
Market Size

Leading Countries and Their Market Shares in the European Outsourcing Market

	%36.5		%25.3
	%12.3		%5.1

High-value-added BPO service providers are predominantly concentrated in the United Kingdom and Germany

Leading Sectors in the European Outsourcing Market



WESTERN EUROPE

The United Kingdom continues to be one of the largest outsourcing markets in Europe, while Germany and France are shifting their operations to Central and Eastern Europe. The use of Generative AI, chatbots, and RPA is becoming more widespread in these countries to provide faster responses and improve efficiency.

CENTRAL AND EASTERN EUROPE

Romania, Poland, and Bulgaria are attracting operations away from Germany and France due to lower labor costs and multilingual service capabilities. These countries are emerging as leaders in rapidly growing IT centers with digital transformation and AI integration.

Source: Technavio, PwC Analysis

Thank You

