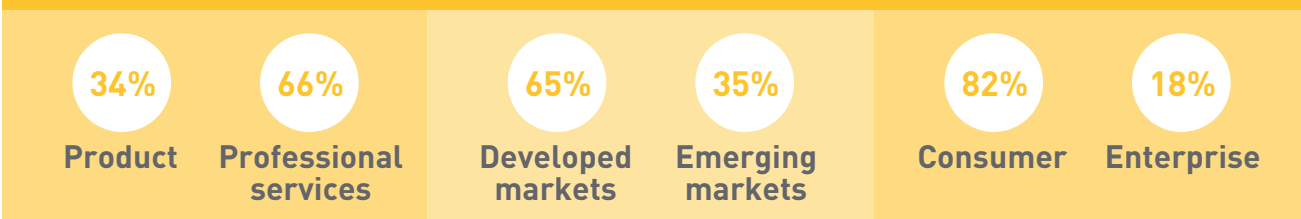


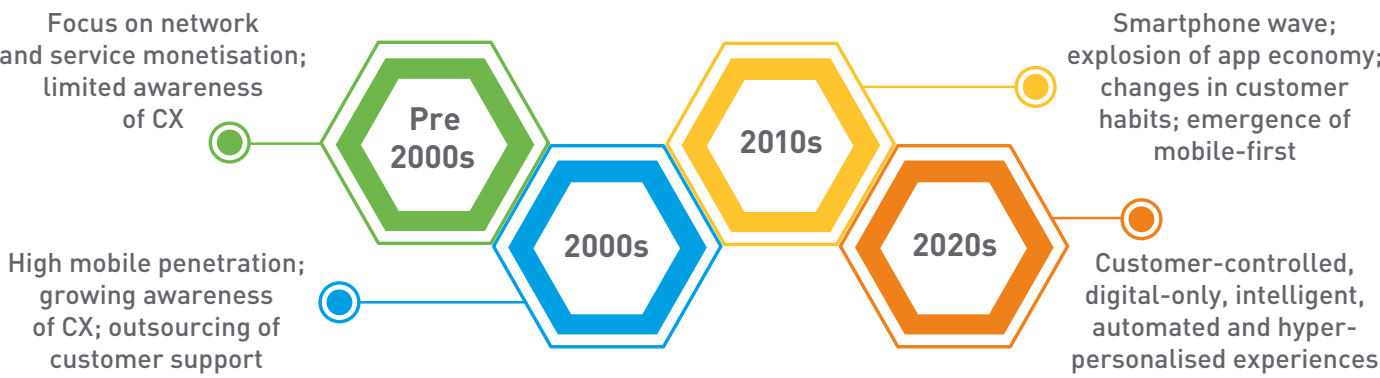
# IN THE THROES OF UPHEAVAL: TELCO CX SET FOR A PARADIGM SHIFT

CSPs SPEND OVER **\$14 BILLION** ANNUALLY ON CUSTOMER EXPERIENCE SOFTWARE SYSTEMS

## How CSP spending on CX systems breaks down



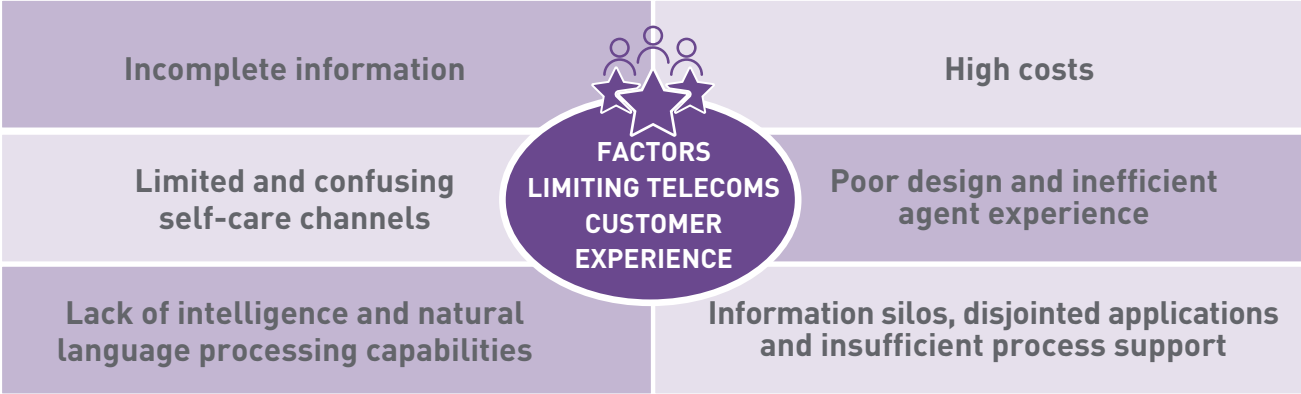
## Evolution of CSP's approach to CX



The long-tail effect of the **COVID-19** pandemic will encourage CSPs to accelerate their plans to transform digital engagement over the next decade.

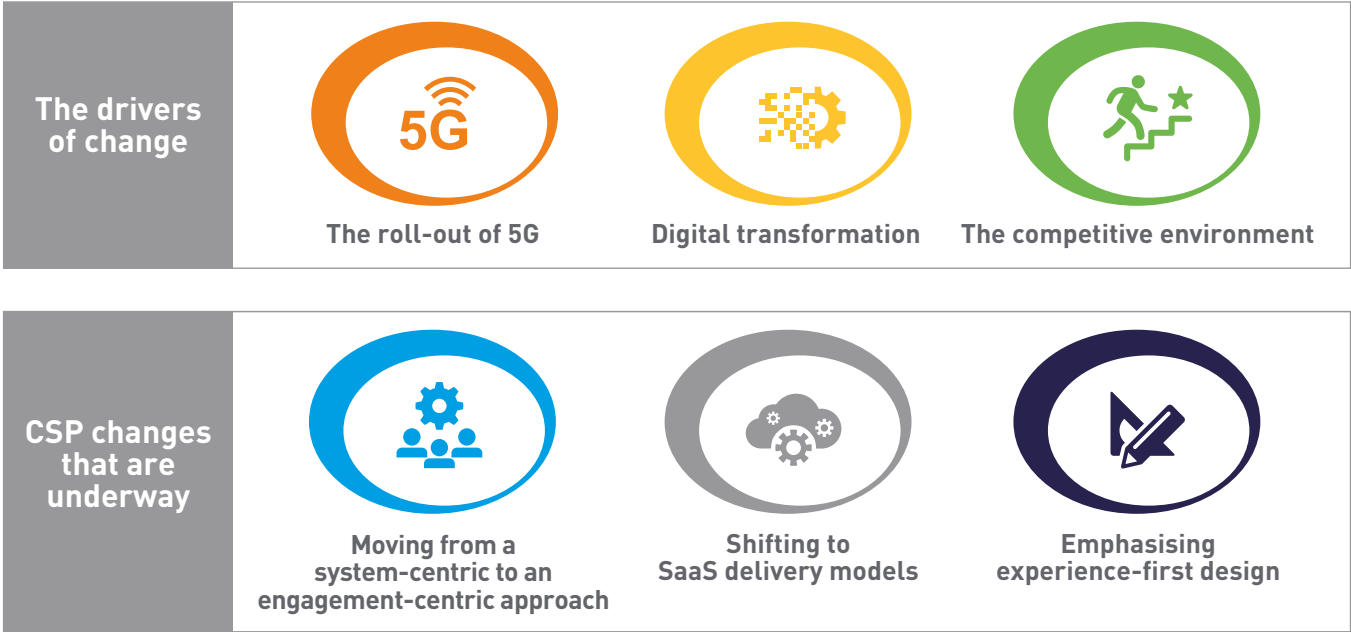
## STATUS QUO

ALTHOUGH CX IS A STRATEGIC PRIORITY FOR CSPs TODAY, MULTIPLE CHALLENGES REMAIN



## A PARADIGM SHIFT IN CUSTOMER EXPERIENCE

THE EVOLUTION OF BUSINESS MODELS AND OPERATING ENVIRONMENTS HAVE DRIVEN CSPs TO PRIORITISE DIGITAL CUSTOMER ENGAGEMENT



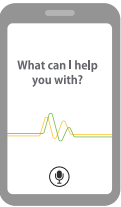
SaaS models will account for **22%** of spend by CSPs in this segment in 2023 vs **12%** in 2018.

## CUSTOMER CENTERED TRANSFORMATION

THE FUTURE OF TELECOMS CUSTOMER EXPERIENCE: INTELLIGENT, PERSONALISED AND DATA-DRIVEN

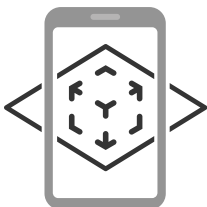


**CSPs' approach to mobile apps was undergoing a radical shift, even before the COVID-19 pandemic.**



Digital Assistants (DA) are cost efficient; they can be as much as **95% cheaper than having a live agent.**

CSP spend on DA will grow at **27.6% CAGR from 2019 - 2023**



**Applying augmented reality to the first two aspects** will provide greater control to customers and enable richer engagement, while using AR for staff training will provide agents with tools that can help them to swiftly address issues.