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**MARKETING
INSIDERS
GROUP**

THE RIPPLE EFFECT OF CUSTOMER UNDERSTANDING
FOR BUSINESS IMPACT IN EVOLVING MARKETS



2026 ROMANIAN CUSTOMER CARE

Benchmark Study



implemented by
**MYSTERY SHOPPING
AGENCY**

SUMMARY

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An iceberg floating in the ocean, with a much larger portion submerged below the surface. The water is a deep teal color, and the sky is a lighter, hazy blue. The iceberg's tip is visible above the water, while the rest of it is hidden beneath the surface.

01

Introduction

Customer Intelligence decides the future of business. Go beyond the surface and elevate your strategy with the right market research solutions.

EUROPEAN CUSTOMER CARE MARKET DYNAMICS

2026 INDUSTRY NPS / CUSTOMER SATISFACTION PERFORMANCE:

Low Scoring: Utilities, Transport, Telecom, Public Services | High Scoring: Retail, Finance, Automotive, Tourism


TOP 10 CX INSIGHTS

1. **Generative AI / conversational AI** is central to CX transformation and ROI.
2. Multichannel support falls short, while **omnichannel** maturity remains low.
3. Speed and **immediate response** dominate customer expectations.
4. **Self-service** is no longer optional, but expected as a day to day standard.
5. **EU CX performance** shows mixed but generally **improving** signs vs. other global regions.
6. **Agent experience** & staffing remain vital, as AI alone doesn't solve emotionally charged issues.
7. Regulatory, **cloud and data-sovereignty** concerns in EU affect vendor choices and customer trust.
8. **Shadow AI** use (unauthorized, risky tools), almost tripled, posing major security threats.
9. Consumer trust in AI depends on how **human-like** and engaging it feels.
10. **Empathy** and **hyper-personalization** drive competitive advantage and market leadership.

THE PARADOX

While CX leaders predict most inquiries will soon be resolved **without human help**, customers still prefer **human contact** and will pay more to skip AI chat bots.

Sources: Gartner, ECCA, KPMG, Forrester, European Commission, Microsoft, McKinsey, Netigate, Zendesk, ICMI, Whitelane, The Institute of Customer Service

 European customer sentiment remains cautious (with inflation as the main concern) but slightly improving in countries like France, Germany, and Spain (UK sentiment declined, Italy stayed stable). Customers are more price-sensitive, leaning on **trusted brands**, trading down in some areas and over spending in others, based on how they feel about the brands. Geopolitical and economical uncertainty drives **simpler choices** and **brand loyalty**, balanced by a growing demand for hyper-personalized experiences.



The Hummingbird Effect

How do we make sense of all these inconsistencies and market shifts? Can we bring stability to an unpredictable environment?

2026 is a pivotal year for Romanian Customer Care. Speed alone no longer earns loyalty, customers value how well they're understood. Empathy coupled with Efficiency have become the **New Currency of Trust**.

Today's customers don't just want answers, they want to feel heard. **That's where we come in.** By identifying hidden gaps and uncovering key metrics, we help businesses stay human, agile and resilient. We call it "The Hummingbird Effect": small, sharp customer insights that ripple across every touchpoint, driving **strategic change** and real **business impact**.



A hand is shown from the top right, placing a red L-shaped block onto a stack of grey blocks. The background is a dark blue gradient. In the foreground, there are several grey blocks scattered on a light blue surface.

02

Study Methodology

See the bigger picture, from numbers to navigators.
This is where tactical data meets strategic clarity.

RESEARCH SCOPE AND MECHANICS



Human Insight + AI Efficiency = Expertise meets Precision
From research strategy to data collection and analysis, every benchmarking step is designed and validated by experts, accelerated by tech innovation.

SEE THE CUSTOMER CARE PATTERNS | SHAPE THE CUSTOMER ENGAGEMENT POSSIBILITIES

WHAT



Customer interactions with **328** companies from **8** Romanian cities.

- **5900+** mystery customer interactions and **650+** customer service scenarios for **41** industries.

WHO



Highly trained mystery agents and senior market research experts.

- **9** mystery agents per company evaluation; **3** different mystery customer personas/demographics per type of interaction.

WHERE



Across critical brand interaction channels.

- IVR / Interactive IVR, Call, Email, Chatbot, Whatsapp / Social Media, Website Contact Form.

WHY

To deliver a reliable market barometer of customer care standards in Romania.

- Mapping the current and future state of customer interaction by spotlighting best practices and vulnerabilities in the local market.



SETTING THE STAGE FOR HUMAN-CENTRIC CUSTOMER CARE IN AN AI-POWERED WORLD | BENCHMARKING STUDY FOCUS:

This study offers an objective, multi-industry analysis on how companies in Romania design and deliver customer care.

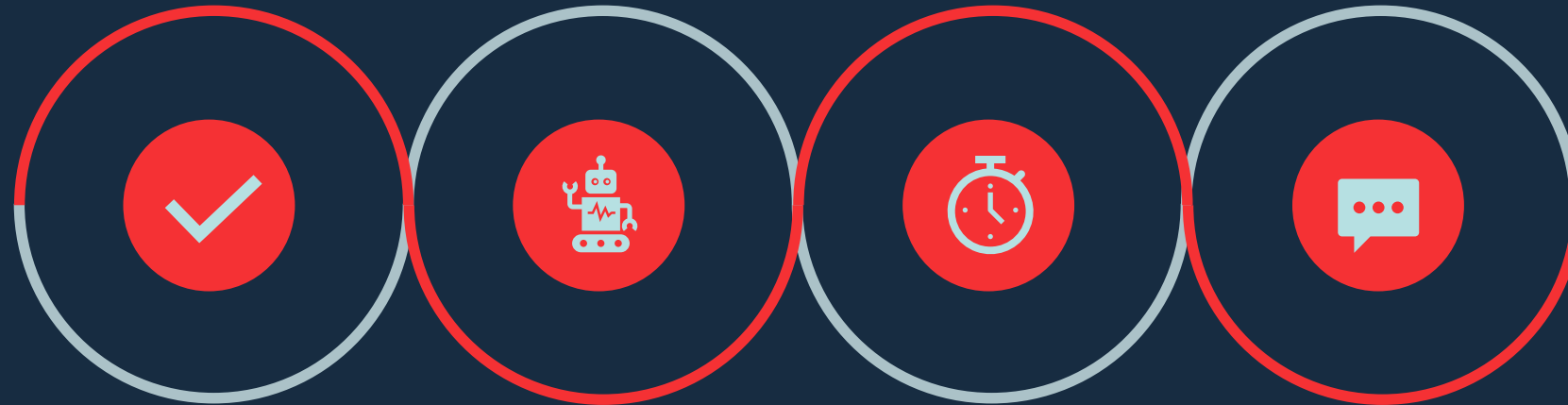
By capturing the **voice of the market**, the strategic research reveals critical service gaps, shifting customer expectations, and emerging CX trends, providing actionable insights for companies aiming to stay competitive, customer-centric, and future-ready.

THE PRESSURE POINTS OF CUSTOMER SUPPORT

KEY PERFORMANCE INDICATORS



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MYSTERY SHOPPING
AGENCY



First Contact Resolution

The percentage of customer issues resolved on the first interaction without follow-ups.

Technology Impact

How much innovation (level of AI adoption, automation, etc.) improves customer service performance.

Time Spent Waiting

The amount of time a customer must wait before receiving service or help (time spent in queues, hold times, delays)

Customer Satisfaction (CSAT)

Immediate feedback after interactions showing how satisfied customers are with a specific service or product.

CUSTOMER SERVICE / SUPPORT

The business engine and safety net.

The operational side of CX, helping customers with effective solutions, timely answers, and the needed support, aiming to safeguard satisfaction.

WHAT MOVES THE NEEDLE IN CUSTOMER CARE

KEY PERFORMANCE INDICATORS



designed & implemented by
MYSTERY SHOPPING
AGENCY



Customer Interaction Warmth

The degree of cordiality, empathy, and human touch in customer support interactions.

Customer Effort Score

How easy it is for customers to get their issue resolved, request fulfilled, or service accessed.

Net Promoter Score

How likely would the customers recommend a company, product, or service (loyalty focus: Promoters, Passives, Detractors).

Customer Sentiment

The expressed attitudes or feelings customers have about their experience, (Negative, Positive or Neutral reviews).

CUSTOMER CARE

The heart of service and compass of trust.

The ongoing organizational practices and mindset towards customers, focused on empathy and value, with the goals of improving satisfaction and building trust and loyalty.

INDUSTRY OVERVIEW

CROSS-SECTOR INSIGHTS FROM KEY MARKET LEADERS
FROM PRIVATE TO PUBLIC CUSTOMER CARE

- <100 employees
- 100-500 employees
- 500-5000 employees
- >5000 employees

328 COMPANIES [41 INDUSTRIES]



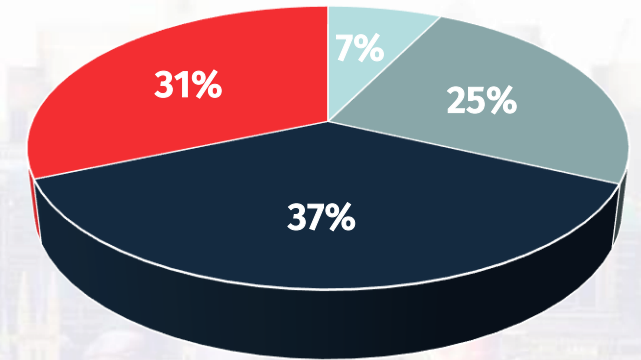
- Telecom
- Banking
- Leasing & Non-Bank Finance
- Health Services
- Insurance
- Courier & Logistics
- Sporting Goods Retail
- DIY Renovation Retail
- Fashion Retail Online
- Electronics Retail Market
- Online Grocery Delivery Market
- Food Delivery Platforms
- Travel & Tourism
- Air Transport / Flight Companies

- Automotive
- Utilities
- Auto Aftermarket & Services
- FMCG Retail / Hypermarkets
- B2B Retail
- Fashion Retail Instore
- HoReCa
- Cybersecurity
- IT
- Streaming
- Pharma & Pharmacy Retail
- Real Estate
- eGrocery Delivery
- iGaming & Sports Betting

COMPANY SIZES

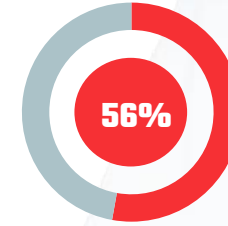
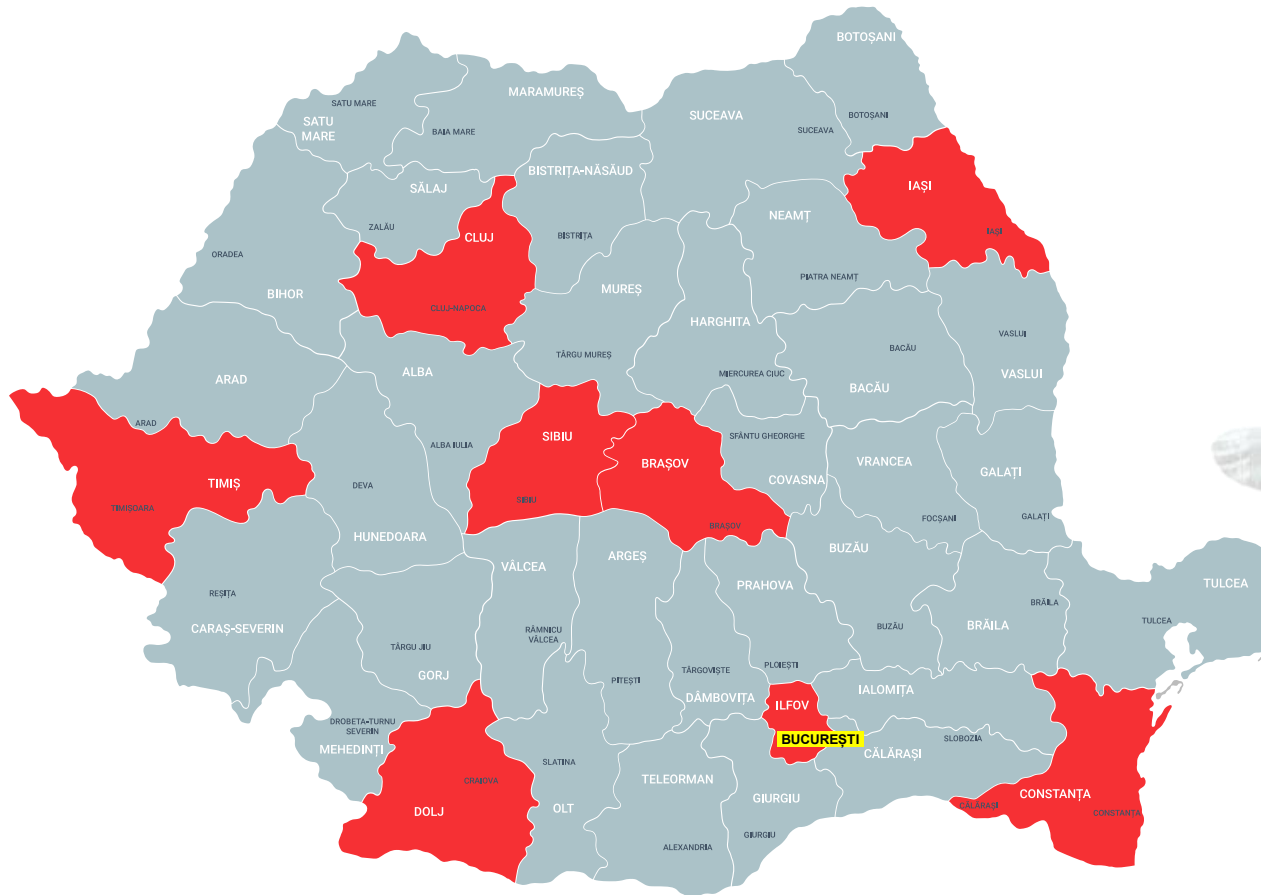


- Diplomatic Institutions (embassies, consulates)
- Local Government (city halls / municipalities county councils)
- Central Government & Ministries (ministries, national agencies)
- Tax Authorities (ANAF, Customs, etc.)
- Public Services & Utilities (water, sanitation, public transport, etc.)
- Social Services (welfare, pensions, etc.)
- Regulatory & Oversight Bodies (environmental authorities; sector regulators: energy, transport, communications, etc.; control / oversight authorities: health & safety, consumer protection, etc.)

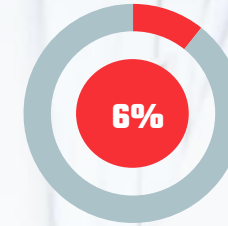


NATIONAL COVERAGE

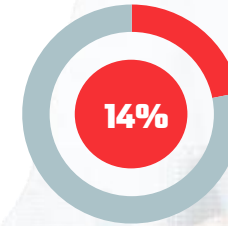
BALLANCED REGIONAL BENCHMARKING
ACROSS KEY BUSINESS HUBS



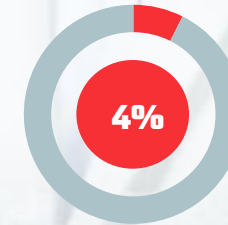
Bucharest



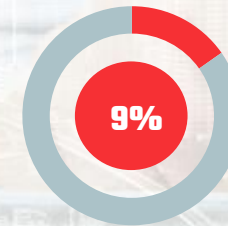
Timişoara



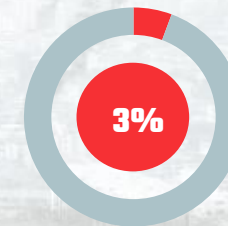
Cluj Napoca



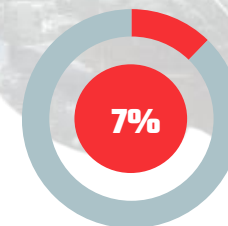
Craiova



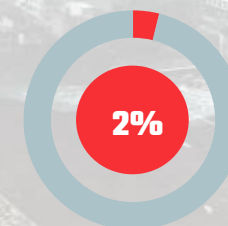
Braşov



Sibiu



Constanţa



Iaşi

Data Sources: Marketing Insiders Group, ONRC, INS, Termene




03

Business Impact

Market knowledge paves the way to market leadership.
Leverage insights that drive action and build the future of care.

CUSTOMER EXPERIENCE

THE UNFILTERED TRUTH OF YOUR BRAND



How your brand makes people feel, and whether they want to feel it again.



THE BRAND
IN MOTION



Customer Experience (CX) is no longer an operational powerhouse for your business, it **is your business**, the real-time story your brand tells through every interaction. You can't always see CX, but the people around you feel it, remember it, and talk about it.



In today's landscape of evolving customer expectations, **organizations that invest in human centric experiences are not simply meeting demand, but actually shaping it**, deciding what comes next. CX is a transformation engine and an Emotional ROI that turns empathy-led interactions into trust, and **brands into habits**.

MĂDĂLINA VILĂU

Founder, Care Academy

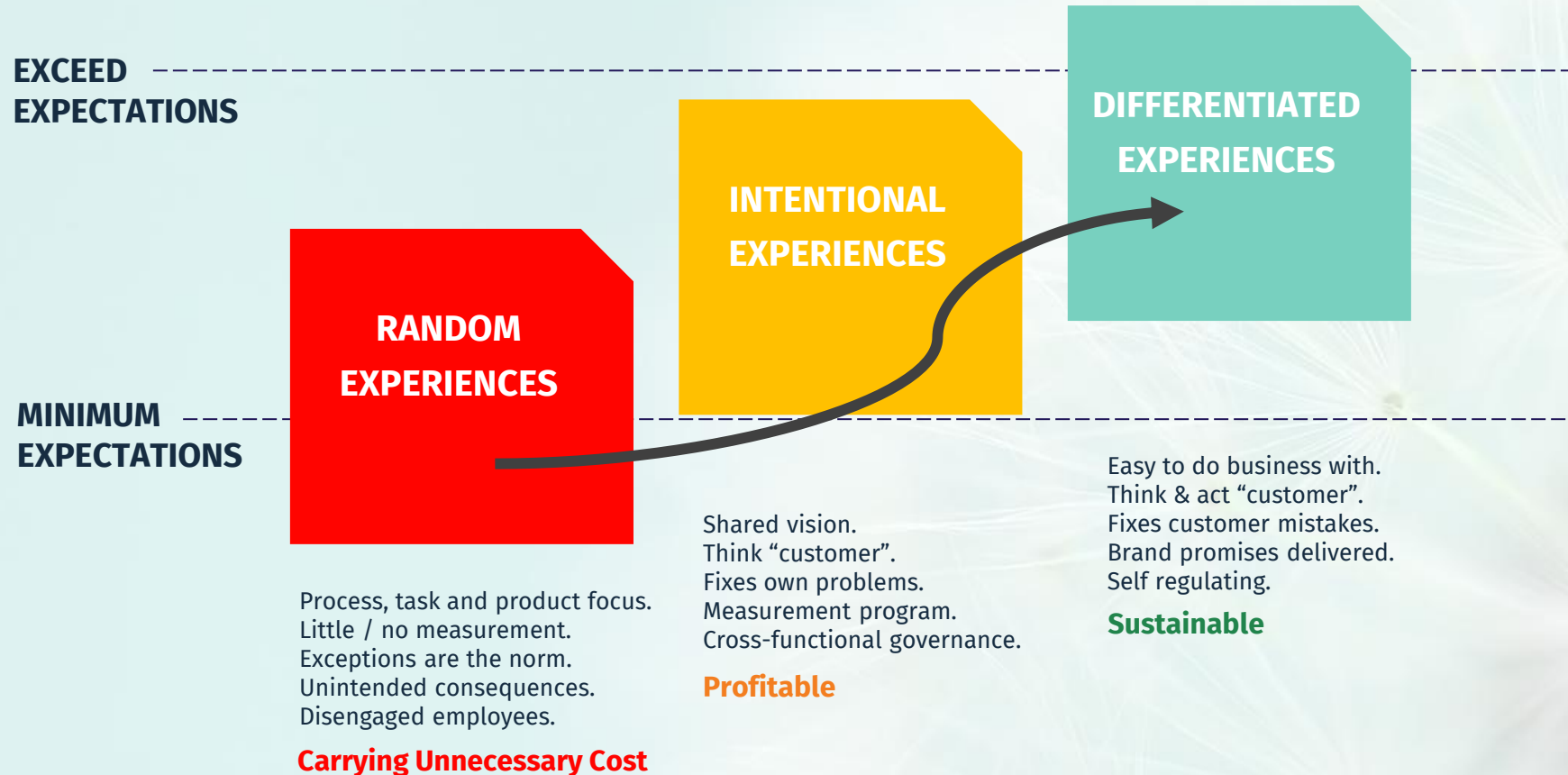
Juror, European Contact Centre & Customer Service Awards

Founder, RO Contact Center Awards & RO CX Awards



EVOLUTION PHASES OF CUSTOMER EXPERIENCE

GOING BEYOND BUZZWORDS



WHY CX IS VITAL

One shift that breaks silos and barriers.

- Brand Relevance & Loyalty
- Emotional Connection
- Higher Retention
- Reduced Churn
- Brand advocacy
- Human-Centric Culture
- Process Agility
- Targeted Investments
- Operational Performance
- Customer Satisfaction
- Future-Proofed Products/Services
- Financial Growth
- Stronger Tech
- Resource Optimization

Source: The Chartered Institute of Marketing

BUSINESS ADVANTAGES

STRATEGIC BENEFITS THAT DELIVER | HOW THE BENCHMARKING STUDY EMPOWERS YOUR BUSINESS



Maximize Market Intelligence for Strategic Planning

Access objective, industry wide data to guide **customer care operations** and align with where the market is heading.



Support Business Cases with Validated Market Data

Use expert, third-party market data to back internal business cases for **strategic change**, justify investments, or secure stakeholder buy-in.



Discover Competitive Standards and Milestones

Gain a competitive edge, enabling more accurate **internal benchmarking** and realistic goals to stay ahead.



Track Market Evolution Over Time For Direction

Monitor YoY changes to predict where customer care is moving, and rethink your **business trajectory** and/or service/product lines.



Identify Innovation and Investment Priorities

Spot what trends are getting traction and prioritize tech, people, or **process optimization** to stay relevant and steady.



Mitigate Risks Proactively and Safeguard Reputation

Identify and anticipate vulnerabilities customer engagement early, to **prevent reputation damage** and costly service failures.

BENCHMARK ESSENTIALS STUDY PACKAGE

PERFORMANCE SNAPSHOT | STANDARD REPORT AND EXPERT INTERPRETATION



Add value, not discounts. Early Bird and Multi-Year Partnership discounts are not cumulative. Partners qualifying for both will benefit from a custom Bundle Offer, capped at a maximum of 20% total value, including any additional provided.



General Benchmark Data Access

- Access to anonymized, aggregated results across industries and cities
- Overview of Key KPIs (FCR, CSAT, CES, NPS, Sentiment, etc.)
- Qualitative Data Report (executive summary, core findings, trends)
- Up to 1.5 hours of consultative presentation of results (online session)
- Full licensing rights for internal distribution (multi-department access)

€4015 + VAT



Optional Add-Ons

- **Follow-up Assessment €1900 + VAT**
Post-implementation re-measurement of representative sample that is statistically valid (e.g. top performers, low performers, regional leads, etc.), and delta report: improvement, regression, stability.
- **Industry Specific Executive Workshop €2530 + VAT**
Internal audit followed by custom operational optimization recommendations and best CX practices (in-person, 10-20 participants, 6 hours)
- **Benchmark Deployment in Other Cities or Countries AVAILABLE UPON REQUEST** (pricing based on scope and region)

EARLY BIRD

Priority access that pays.

Limited-time offer for early adopters that secure the benchmark partnership prelaunch, before October 15th :

10% OFF listed package price **OR** **2 hours** of operational consultancy services with our lead CX experts.

BENCHMARK PLUS STUDY PACKAGE

PERFORMANCE ACCELERATOR | CUSTOM INTELLIGENCE AND DIAGNOSIS



Full Benchmark Data Access and Strategic Support

- Overview of Key KPIs (FCR, CSAT, CES, NPS, Sentiment, etc.)
- Qualitative Data Report (executive summary, core findings per industry, city and company sizes)
- Up to 1.5 hours of consultative presentation of results (in-person or online)
- Full licensing rights for internal distribution (multi-department access)
- Deep-dive report tailored to client industry and strategic pain points/requests
- Recommendations and gap analysis vs. top performers
- Industry-specific insights and trends
- Full database access – all companies/institutions (with filters by region, channel, customer type, etc.)
- Up to 6 hours of strategic consulting /audit/ workshop with senior team

€8020 + VAT



Optional Add-Ons

- **Follow-up Assessment €1900 + VAT**
Post-implementation re-measurement of representative sample that is statistically valid (e.g. top performers, low performers, regional leads, etc.), and delta report: improvement, regression, stability.
- **Benchmark Deployment in Other Cities or Countries AVAILABLE UPON REQUEST** (pricing based on scope and region)



Add value, not discounts. Early Bird and Multi-Year Partnership discounts are not cumulative. Partners qualifying for both will benefit from a custom Bundle Offer, capped at a maximum of 20% total value, including any additional provided.

TWO-YEAR PARTNERSHIP

**Long term
competitive edge.**

Strategic fees and exclusive benefits for partners who commit for both 2026 and 2027 benchmark study editions:

20% OFF listed pricing **AND**
Extra workshop (4 hours)



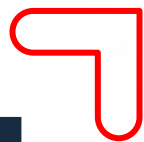
Expertise Ecosystem

People do business with people.
We built a multi-industry CX community of business leaders
across Europe, reaching to USA, Australia and Canada.

RESEARCH CORE



MARKETING
INSIDERS
GROUP



OANA OLTEANU
Market Strategy Advisor
Brand Growth | People Culture
For 20+ years



MĂDĂLINA VILĂU
Chief Executive Officer
Business Transformation
Leadership Facilitation
CX Training & Mentoring
For 30+ years



FLAVIA IONIȚĂ
Project Manager
Market Research | Business Operations
For 21+ years



ALEXANDRA COZMA
Project Coordinator
Market Research | CX Operations
For 18+ years

MYSTERY CUSTOMERS NETWORK



200 LOCATIONS | 3 COUNTRIES
3500 MYSTERY CUSTOMERS | 4 REGIONAL SUPERVISORS

TEAM SELECTION

Agents are carefully selected through phone, video, or in-person interviews conducted by the Mystery Shopping Agency's project managers. When needed, the selection process is further supported by interviews with regional supervisors.

AGENT TRAINING

Onboarding Course: An introduction to the role of a mystery customer, expected behaviors, and key elements for ensuring a high-quality mystery shopping process, followed by tailored training based on the specific requirements of each project.

EVALUATION

Agents undergo regular evaluations to assess their understanding of the project role and the essential knowledge needed to perform market research tasks effectively.

ONGOING RECRUITING

Having a network of always-ready, professional agents is our ultimate goal. Expanding our database, increasing the number of candidates who match diverse client profiles, and ensuring 24/7 coverage across more cities in Romania are just a few of the reasons we are constantly seeking new collaborators.

Agile talent profiling, expert resources and long lasting collaborations

We customize every mystery shopping assignment to closely simulate a real customer experience. To achieve this, our agents are selected based not only on their social background and professional skills but, more importantly, on how well they align with the specific needs of each project and its

Ongoing Assessment Areas Adaptability, Information Precision, Professional Conduct, and Responsiveness

As an additional quality control measure, selected mystery customers are contacted and re-trained before the start of each project phase. Our internal procedures ensure that agents have a clear and thorough understanding of what is expected during each customer interaction, including the information they must communicate to company representatives and the insights they need to spot and collect.



Thank you
See you soon

MĂDĂLINA VILĂU
Chief Executive Officer

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