

The hiya logo is rendered in a lowercase, sans-serif font. The letter 'i' has a dot that is a small circle. The background features abstract purple and dark blue shapes, including a shield icon in the upper right and a mobile phone interface element with three dots in the middle right.

STATE OF THE CALL 2023



243 billion calls analyzed
2K+ businesses surveyed
13K+ consumers surveyed
600+ carrier decision-makers surveyed

hiya.com/state-of-the-call

State of the Call 2023

There is power in the voice call that can't be duplicated by any other communication channels. It's fast, efficient, reliable, and above all human – it creates a vibrant connection in an increasingly digital world.

That's why we do our annual State of the Call report: It gives us an important opportunity to analyze and reflect on the latest insights and top trends in the voice channel, and help the whole industry – carriers, device manufacturers, businesses, tech providers, and regulators – better understand how people communicate and do business.

For this year's edition, we commissioned a market research firm to survey more than 2,200 business workers, 13,000 consumers, and 600 decision-makers at network carriers in the US, Canada, UK, Germany, France, and Spain.

When combined with our analysis of more than 243 billion phone calls in the Hiya ecosystem in 2022, this data produced 5 powerful trends. We examine each in depth in this report.

Top 5 trends for 2023

- 1 Spam and fraud frequency is increasing – and threatening trust in voice calls.
- 2 Financial impacts may be improving, but they're not the only cost of spam and fraud calls.
- 3 Trust and security are a major opportunity for carriers and businesses alike to improve customer experience.
- 4 Businesses are feeling the impact of spam and want to improve their voice reputation.
- 5 Identity can help reestablish trust.

What hasn't changed

- ✓ Voice is still the go-to choice for consumers' most important communications.
- ✓ It's also the top communications method for professionals because it's crucial to their businesses.
- ✓ Virtually everyone who relies on the phone is using it more than ever.

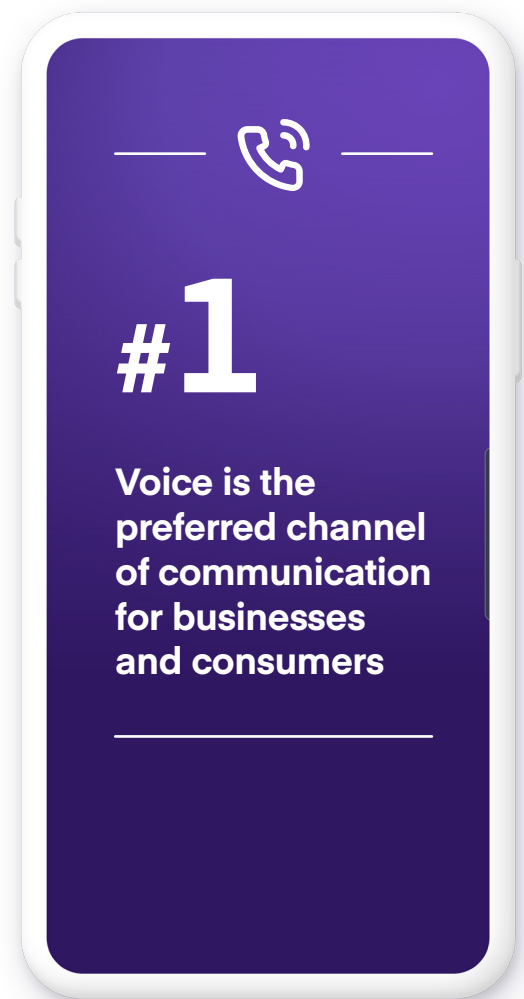
Voice is still the go-to choice for consumers' most important communications.

People have more ways to communicate than ever – from “old” channels like email, text, and social media to a slew of emerging messaging and chat apps, video services, gaming platforms, and more. Yet no matter how diverse our communications options become, the phone call remains the undisputed leader.

Consumers continue to rely on voice calls for their most important communications, especially when they involve sharing sensitive information, such as healthcare test results or credit card transactions.

Consumers prefer picking up the phone across a wide range of industries, too – which means voice calls are driving business across enterprises. And it's not even close in some sectors.

47% of consumers prefer phone calls when interacting with healthcare providers, for example; email is a distant second place at 16%. Options such as text messaging (6%) and live chat (5%) are certainly used – but nowhere near as much as the phone.

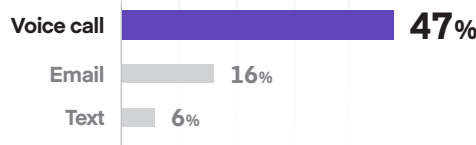


What hasn't changed

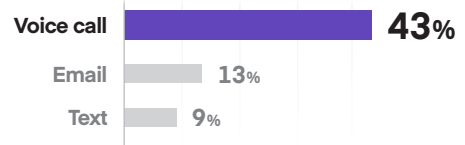
People prefer voice for interaction with:



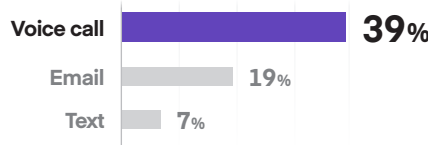
Healthcare



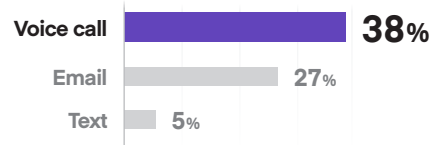
Pharmacies



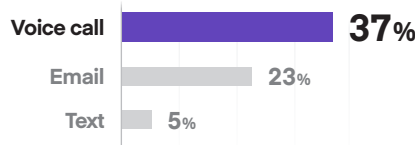
Auto service providers



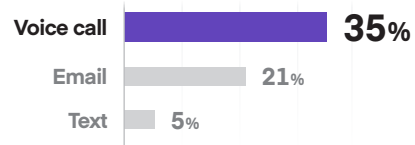
Insurance



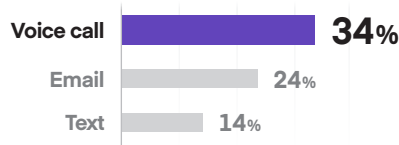
Banking and financial transactions



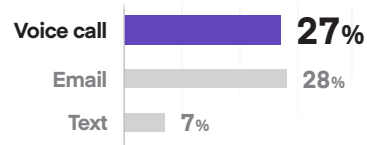
Credit card



Home and delivery service



Retail companies



Even in an industry like retail, where email communications are especially popular (28% prefer it) – think special offers, flash sales, and so forth – voice calls (27%) are in a virtual tie for top communications choice.

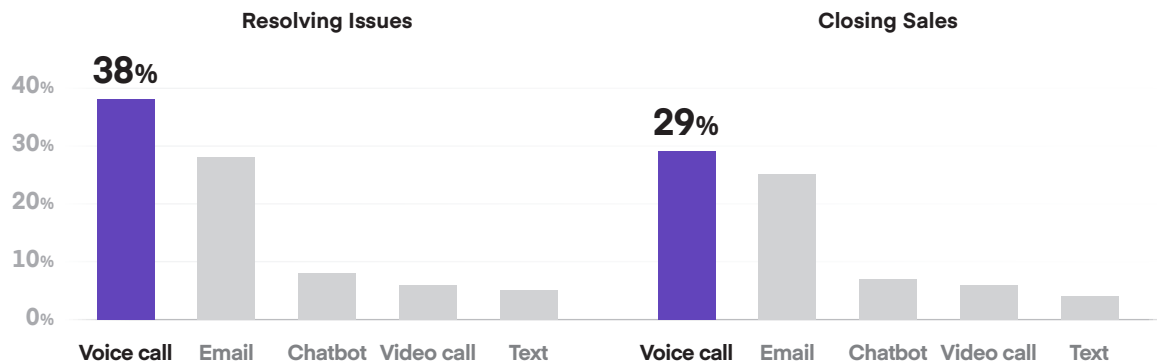
Voice calls remain the go-to choice for consumers because they work. Voice is fast, reliable, and human. But most of all it's trusted. We see a similar pattern across industries when we ask consumers about their most trusted methods of communications. **Voice calls are viewed as the safest, most trustworthy means of connecting, especially when sensitive information is involved.**

What hasn't changed

It's also the top communications method for professionals because it's crucial to their businesses.

Workers across multiple industries and countries frequently pick up the phone for their most important communications – often more than any other option such as email, text, or chat. Voice is especially critical for sales and service-related communications as it's crucial to revenue generation and customer experience.

Working professionals report their top uses for voice calls are:



Given the importance of voice, it's unsurprising to learn that an inability to connect calls to customers and prospects has serious consequences for enterprises and their employees. While that's a problem globally, it's especially urgent in the US, UK, and Spain – more than half of professionals in each country reported negative financial impacts as a result of being unable to connect calls to prospects and customers.

38%

of workers report that their business has been financially impacted by an inability to reach prospects and/or customers.

42%

of workers say they have lost customers or a potential deal because of inability to connect by phone.

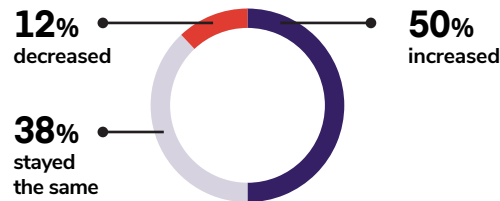
What hasn't changed

Virtually everyone who relies on the phone is using it more than ever.

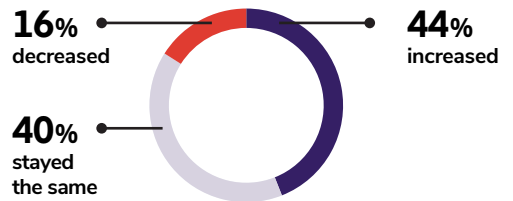
Stakeholders in every category – consumers, businesses (and their employees), and mobile carriers all report their voice usage is increasing and expect it to continue growing in 2023.

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

Business professionals

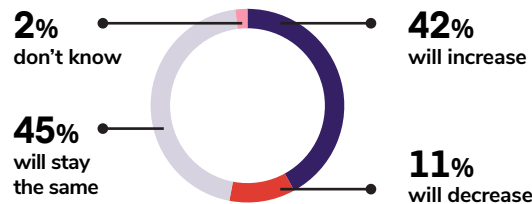


Consumers

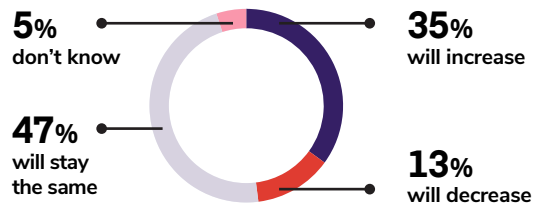


How do you predict your usage of the phone call will change in the next 12 months?

Business professionals



Consumers



The phone call isn't going away – if anything, it's become more entrenched for consumers, businesses, and carriers alike.

TREND 1

Spam and fraud frequency is growing – and threatening trust in voice calls.

Spam calls – including both illegal fraud calls as well as legal nuisance calls – are increasing in frequency. Unwanted calls erode consumer trust in their favorite communication tool – the phone – and therefore make it harder for legitimate, trusted businesses to reach them by phone. As we examined in the second trend in this report, that has very real consequences for sales, customer experience, and other critical areas.

The spam and fraud problem, by the numbers

Hiya processed more than 243 billion calls in 2022, up from 150 billion in 2021. More than 10% of all the total call volume, 25 billion, were flagged as spam or fraud. That’s an average of 2 billion calls every month and an average of 11 spam calls per person, every month.

It’s an enormous problem that is getting bigger. We can better understand the size of the problem by looking at the rates of spam across only unknown calls*. While spam is a problem everywhere, the specific rates of nuisance and fraud calls do vary by country.

Spam rate by surveyed countries in 2022

	Fraud	Nuisance	Total Spam
US	0.9%	34%	34.9%
UK	13%	15%	28%
Canada	5.9%	15%	20.9%
France	2%	41%	43%
Germany	* Hiya uses a single spam warning for both in Germany		21.21%*
Spain	4.9%	39%	43.9%



Explaining spam and fraud

At Hiya, we define spam as unwanted calls, which includes both illegal fraud calls and legal nuisance calls. The spam flag rate in this report represents unknown calls* outside of an individual’s contact list that Hiya has identified and flagged as either fraud or nuisance.

Financial impacts may be improving ...

Some good news from the frontlines of the fight against spam and fraud calls – financial impacts appear to be on the decline in 2022 from 2021.

Spam, fraud, and financial losses



United States

14 total spam and fraud calls per user per month

\$431.26 Average lost by people who were scammed in 2022 (USD) vs \$567.41 in 2021



United Kingdom

4 total spam and fraud calls per user per month

\$324.04 Average lost by people who were scammed in 2022 (USD) vs \$680.17 in 2021



Canada

2 total spam and fraud calls per user per month

\$472.87 Average lost by people who were scammed in 2022 (USD) vs \$804.69 in 2021



France

9 total spam and fraud calls per user per month

\$360.62 Average lost by people who were scammed in 2022 (USD) vs \$289.27 in 2021



Germany

2 total spam and fraud calls per user per month

\$325.87 Average lost by people who were scammed in 2022 (USD) vs \$273.81 in 2021



Spain

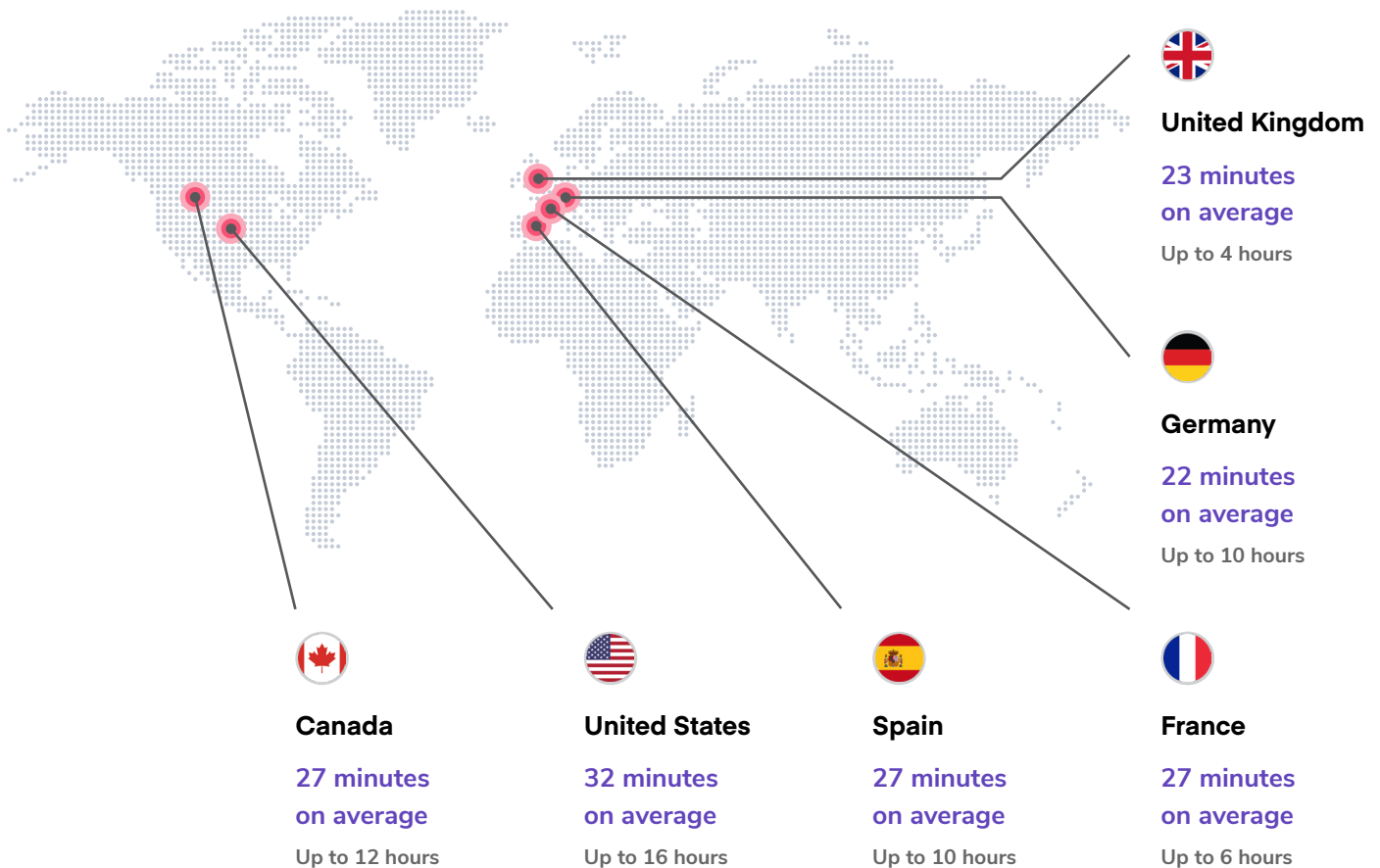
9 total spam and fraud calls per user per month

\$282.35 Average lost by people who were scammed in 2022 (USD) vs \$423.16 in 2021

... but they're not the only cost of spam and fraud calls.

There are other impacts of spam and fraud beyond financial losses – such as lost time. Consumers who report losing time due to spam or fraud calls lose more than 27 minutes on average and up to 16 hours annually.

Annual time cost by country



There is another far-reaching cost of spam and fraud. It decreases trust in legitimate, wanted calls. That's a major problem – but also a major opportunity for carriers and businesses who invest in effective solutions.

TREND 3

Trust and security are a major opportunity for carriers and businesses alike to improve customer experience.

The continued growth of spam calls is obviously a huge problem – one with major consequences for consumers, businesses, and carriers if left unchecked.



1 in 3

businesses have had their name used by an impersonator making scam calls

87%

of consumers believe unidentified calls may be fraudulent

63%

of consumers have received an impersonation call

The vast majority of consumers, 87%, think unidentified numbers may be fraudulent. That's a clear sign of the detrimental effects of unwanted calls of all types.

63% of consumers have received a call from a bad actor or scammer impersonating a legitimate business or organization - and only 27% of them say it didn't negatively impact their opinion of the legitimate business or organization. One in three consumers say that an impersonated call made them suspicious of any calls coming from that business.

The most impersonated industries as reported by consumers



Financial services



Utilities



Government

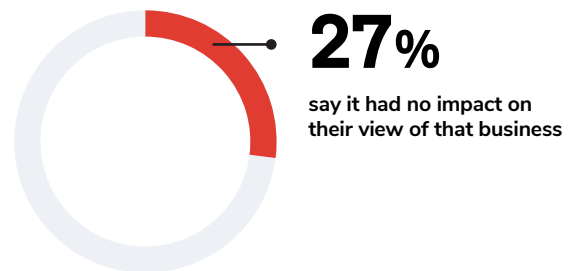
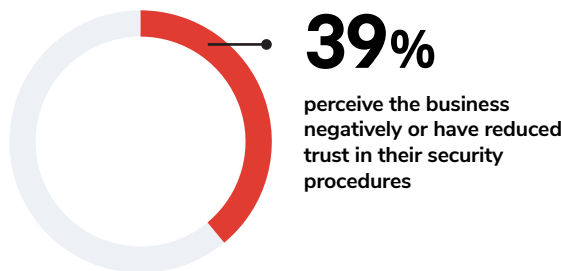
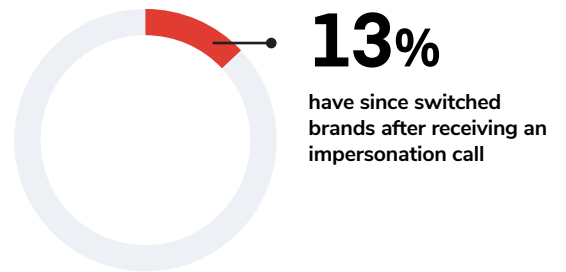
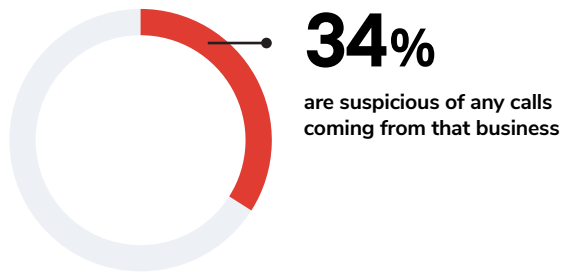


Insurance (non-health)

TREND 3

Trust and security are a major opportunity for carriers and businesses alike to improve customer experience.

Impersonated calls negatively impact how consumers perceive businesses:



A major opportunity for carriers

Only 14% of carriers believe spam and fraud is getting better. By investing in call trust and security, they can significantly improve their overall customer experience – while eliminating undesirable effects like lost sales and customer churn in the process.

Many consumers (44%) agree that carriers are doing enough to combat the spam problem, and carriers themselves almost universally agree (94%) that voice security is a priority.

There is ample room for continued improvement. And carriers see that opportunity: 63% of carriers report that their investment in voice security and call protection will increase in 2023, and just two percent will decrease their spending.

TREND 4

Businesses are feeling the impact of spam and want to improve their voice reputation.

17%

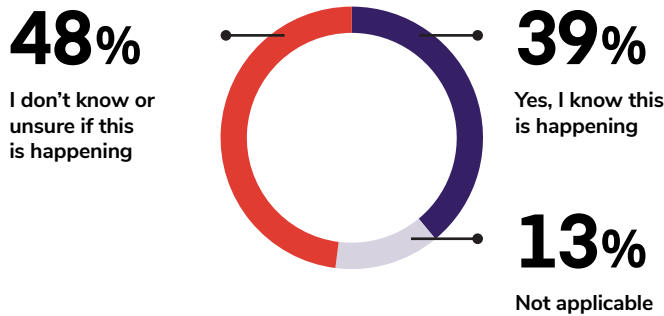
of businesses report a decline in answer rates due to spam calls

Businesses also understand the problem and how it affects them.

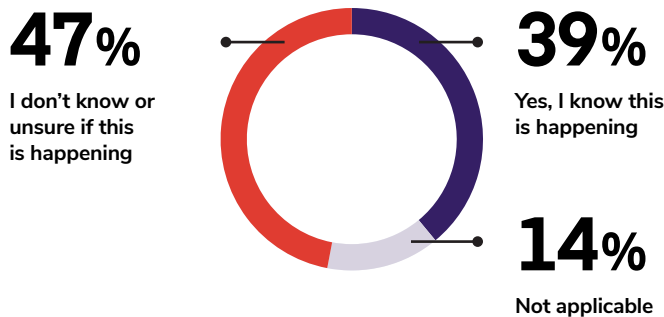
39% say they know their legitimate outbound calls are being marked as spam. Another 37% report that they don't know if they're being marked as spam, suggesting that the issue may be even larger.

The same pattern appears with impersonation calls. 39% report their business name has been used in scam calls by impersonators, and 37% say they don't know if this has happened.

How aware are businesses that they're being flagged as spam?



How aware are businesses that their name has been used in scam calls?



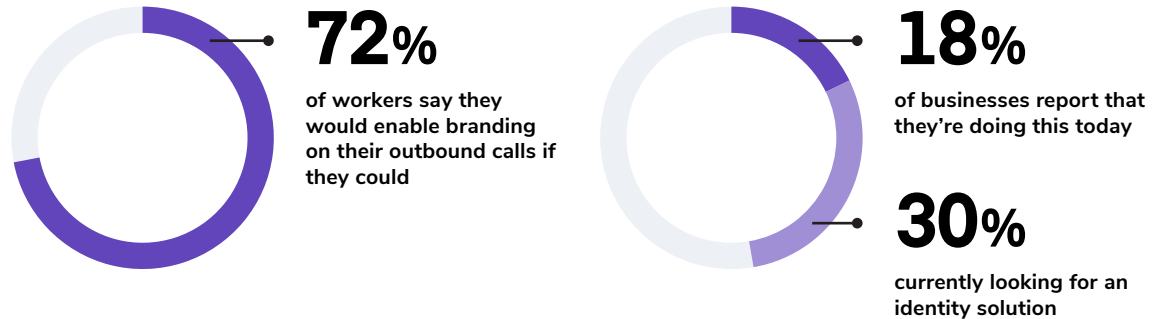
The rise of number rotation

20% report using a reputation service, and 19% have tried number rotation or "cooling off" to improve their reputation on average across all 6 countries surveyed. Businesses in the US tell a different story as nearly 40% say they have rotated numbers to address their reputation. The practice of number rotation is a growing trend across the voice industry.

TREND 5

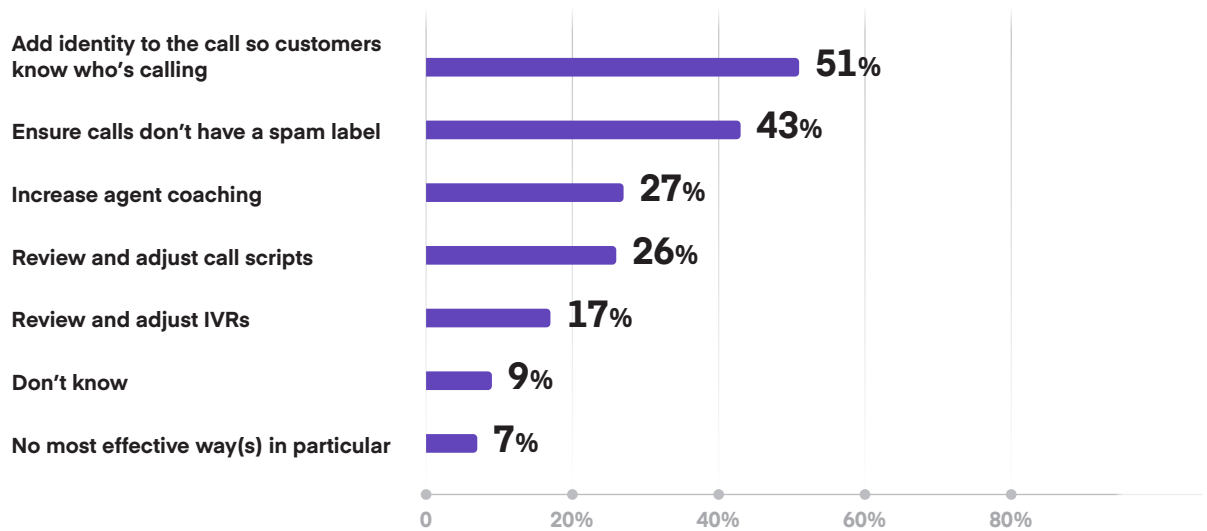
Identity can help reestablish trust.

Organizations across industries generally understand the problem and want to do something about it – but they need help. The answer? Adding identity to outbound calls. Consumers want it, and businesses and their employees know it will make a difference.



What are the most effective ways to increase answer rates?

Respondents selected up to 3.



TREND 5

Identity can help reestablish trust.

Identity is hands-down the most effective means of ensuring consumers and businesses stay connected by their method of choice – the phone call. Businesses get this, too. 51% say identity is the most effective way to increase answer rates – the top strategy across all regions surveyed. And, identifying phone calls is one of the few ways enterprises can fight back against fraudsters that use their number to scam people.

The voice call is too valuable to leave to chance. It is by far the go-to choice for consumers and businesses alike and that preference keeps going stronger every year. But the spam and fraud problem is also growing significantly – and at a pace that threatens our go-to choice for staying in touch. Reliable identity will restore trust and protect it for the long haul, ensuring wanted calls stay connected.

Identity is one of the few ways enterprises can fight back against fraudsters



72%

of consumers say they're more likely to answer a call if they know who's calling

Methodology

Market research

Censuswide conducted a market research survey on behalf of Hiya during the period of January 17 and 23, 2023. In total, 2,209 business professionals who use a phone frequently as part of their role and 13,326 consumers were surveyed online. In addition, 624 decision makers at mobile network carriers were also surveyed online. The survey was conducted in the US, Canada, 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: US, Canada, UK, Germany, France, and Spain. Hiya's data includes more than 243 billion calls that passed over its network in 2022. The Hiya Voice Security Network includes more than 250 million users worldwide through Hiya's integrations with wireless carriers and device manufacturers, and the Hiya app. All proprietary data has been aggregated and anonymized.



2K+

businesses surveyed



13K+

consumers surveyed



600+

carrier decision-makers surveyed



243B

calls analyzed



hiya

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 Security 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 400 million users on the Hiya Voice Security Network, powering call protection and identity for AT&T, EE, Samsung, Ericsson and more.

