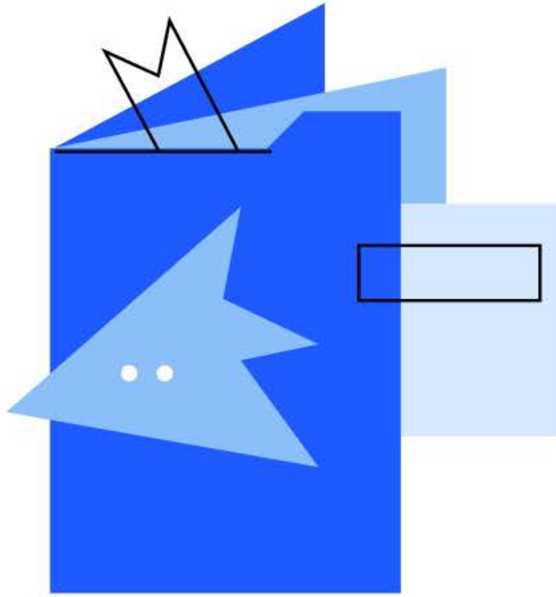
The State Of Business Calling *2026*

Understanding the changing role of voice as a customer engagement channel in India

Research report by Truecaller for Business and Tata Tele Business Services



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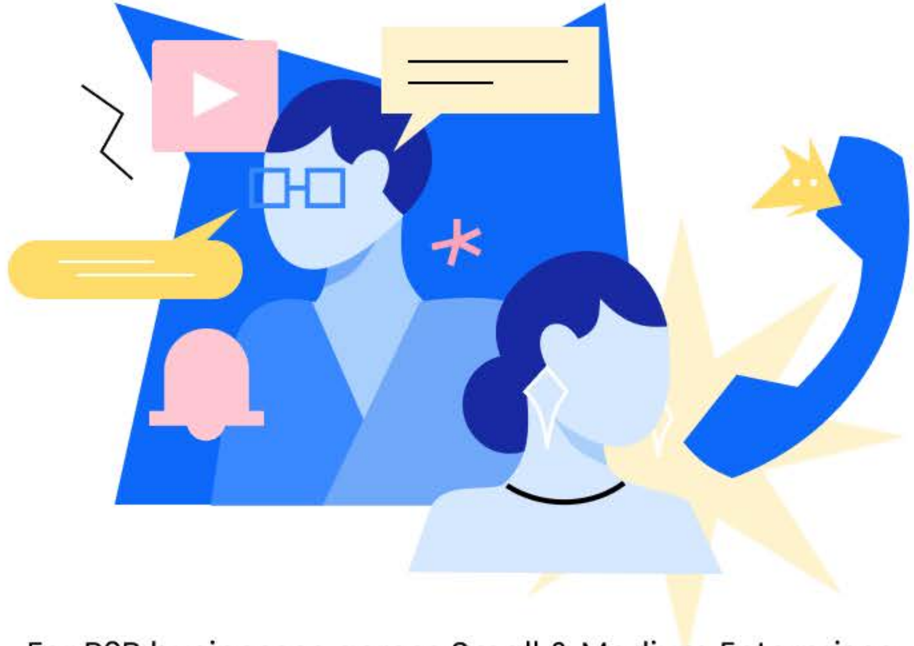
The Big Picture

In 2026, business communication in India sits at a strange crossroads. On one side, you have an explosion of digital touch points—SMS, messaging apps, email, chatbots—giving customers more ways to engage than ever before. On the other, you have something far more familiar: a simple voice call that customers and businesses still turn to when the stakes are high, the issue is complex, or reassurance matters more than speed.

This report brings those realities together. It examines where voice genuinely leads, where digital channels are better suited, and where combining the two creates the most value.

Drawing on business and consumer data, it maps channel preferences, trust dynamics, and performance measurement across industries and organisation sizes. It also introduces structured benchmarks like the Voice Adoption Index, and the Feature Engagement & Interest Indices to provide a clearer view of how channels are being used today.



For B2B businesses across Small & Medium Enterprises (SMEs) and Large Enterprises (LEs), the message is practical: **voice isn't disappearing; it's evolving.**

And businesses must evolve with it to keep pace with how customers actually want to communicate in 2026.

What the Data Tells Us

1. Voice remains the communication backbone

52%
of Large Enterprises

use voice as their primary channel over other mediums for customer engagement.

On the customer side,

76%
of consumers

prefer receiving voice calls from businesses, even with multiple digital channels available.

Voice still carries the heaviest load especially for complex, high-stakes, or emotionally charged interactions, despite the rise of digital-first engagement.

2. Customer intent drives channel preferences

50% of all businesses across sizes prefer voice calls for **grievance redressal** and **complaint handling.**

For billing and documentation,

20% pick voice

40% choose email

as their most preferred channel.

Different scenarios call for different channels. The goal for businesses is to match channel to customer intent, not convenience.

3. Channel diversity shapes strategic voice potential

Small & Medium Enterprises rely on
2 channels

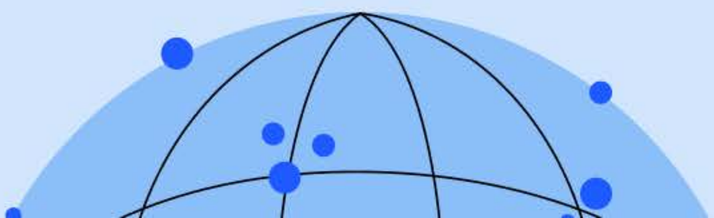
Voice (55%) and Email (51%) dominate their communication stack.

In contrast,

Large Enterprises use
5+ channels

with balanced adoption ranging from 33% to 54%.

Multi-channel infrastructure integrates customer data across touchpoints—positioning Large Enterprises to transform voice into a connected intelligence layer.



4. Trust is both voice's strength and its biggest threat

41%
of consumers

say voice is the **most trusted channel**—more than email, SMS, or chat.

79%
of businesses

cite customers' **avoidance of unrecognised numbers** as a key barrier in using voice effectively.

This is the core paradox : voice feels most human and trustworthy, until the number looks unfamiliar. Identity, verification, and intent are now make-or-break for voice.

5. Reliance on voice varies by region and audience

Business adoption patterns

Voice adoption varies by region, reflecting differences in market complexity and cultural factors.

35% in South India — High Adopters

43% in Delhi NCR — Low Adopters

68% in West India — Medium Adopters

Consumer preference patterns

Demographics shape channel choice—connection drives younger users, speed drives older ones.

21–35 y/o

lean on voice for personal connection

46–50 y/o

lean on messaging channels for speed

6. Customers want flexibility, but businesses are not prioritizing it yet

49% of consumers

want the flexibility to schedule callbacks at a convenient time—the **most requested** improvement.

However, over the next 12 months, **business investment** is expected to focus primarily on:

- Caller identity and verification
- Business name and logo display
- Call purpose visibility

Voice innovation is currently focused on recognition and legitimacy, while customers are asking for greater control over when conversations happen.

7. Voice is adopted for trust but measured for efficiency

41% of businesses

say trust & brand perception are key factors when choosing voice as a channel.

Yet,

the top metrics used to evaluate voice across industries are:

72% Response Rate

57% Time to Resolution

53% Cost per Interaction

Businesses adopt voice for trust, but measure it on speed and cost. Until metrics shift from efficiency to relationship outcomes (loyalty, trust, resolution quality), voice will remain undervalued as a strategic channel.

The Takeaway

Voice isn't going anywhere.

The data clarifies: voice remains the backbone of customer engagement; especially in moments that demand trust, urgency, empathy, or clarity.

Customers still prefer it. Businesses still rely on it, especially high-stakes sectors. But there's a growing gap between **why voice is chosen** and **how it's executed and measured**.

Closing this gap requires rethinking voice from the ground up—aligning measurement with relationship outcomes, matching investment to customer needs, and building multi-channel intelligence that makes voice smarter, not just faster. Organizations that make this shift will transform voice from a necessary cost into a competitive advantage.

Methodology

How the study was conducted

This research was conducted by Kantar using a 3-pronged approach to ensure 360° coverage:

Method	Sample Profile
1. Primary Quantitative Survey	510 B2B respondents across Micro to Large Enterprises, from 6 Indian metros.
2. In-depth Interviews	20 qualitative interviews (8 Small & Medium Enterprises, 12 Large Enterprises) with Marketing, Customer Experience, and Customer Service leaders.
3. Kantar ICUBE Survey	1,000 end consumers (90% working professionals) across 17 Indian cities.

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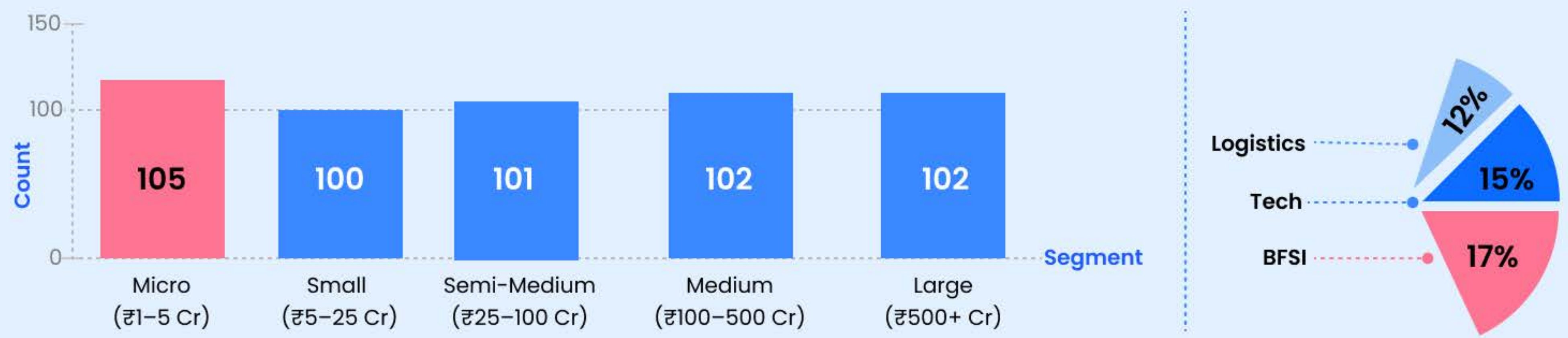
Who was surveyed

1. B2B Businesses

Industries Covered: BFSI, Tech, Logistics, Automotive, Services, Construction, Real Estate, Travel & Hospitality; Digital-first businesses

Respondents: Department heads and functional leads from Marketing, CX, and Customer Service teams

Geographic Spread: 6 cities including Delhi NCR, Mumbai, Bangalore, Chennai, Hyderabad, and Pune



Who was surveyed

2. Consumers (Kantar ICUBE survey)

All respondents had regular voice and digital interactions with the industries listed previously.

Sample Size: 1,000 respondents

Working professionals	Home-makers
900	100

Age Group: 21–50 year olds

21 ······ 50

Location:
17 cities including Delhi, Mumbai, Bangalore, Chennai, Pune, Kolkata, Ahmedabad, Jaipur, Surat, Indore, etc.

Disclaimer: Map not to scale. This map is an original illustrative artwork prepared for this publication and is not intended to constitute an official or authoritative map. The depiction of India's boundaries is intended to be consistent with the territorial boundaries recognized by the Government of India.

Section 2

The Voice Calling Landscape Today

The voice ecosystem in India is entering a new operating reality.

New regulatory developments—from evolving DLT frameworks and 140/160 number classifications to CNAP—are reshaping how businesses can reach customers. At the same time, customers are becoming more selective about which calls they answer as they navigate messaging apps, email, in-app notifications, and social platforms through the day.

As a result, calls now compete with a constant stream of digital touch points in a far more connected and accountable environment. For businesses relying on voice to drive outcomes, this shift requires rethinking how voice earns attention and engagement.

Structural Shifts

Three parallel shifts are currently playing out:
On one side, regulation is formalising how calls are placed, identified, and classified. At the same time, customer behaviour is evolving in a more connected, multi-channel environment. Alongside this, businesses are facing new operational and strategic challenges as they adapt to these changes.

1. Regulatory Shifts

Distributed Ledger Technology (DLT)

DLT registration is now mandatory for all business communications. Businesses must register numbers, templates, and campaigns with telecom providers to ensure traceability.

140 Series (Promotional Calls)

Numbers beginning with 140 are designated for promotional outreach, helping customers identify marketing calls.

160 Series (Service Calls)

The 1600 number series is designated for service and transactional communication for BFSI sector entities and Government organizations, with TRAI mandating phased onboarding across SEBI, RBI, IRDAI, and PFRDA-regulated entities.

Calling Name Presentation (CNAP)

CNAP has been approved by TRAI and DoT, with network pilots completed and pan-India rollout initiated, establishing a KYC-verified caller identity layer across telecom networks.

2. Consumer Behavior Shifts

Attention Saturation: With digital touch points increasing, attention has become more selective. Even compliant, legitimate calls go unanswered unless the brand is known, named, and trusted.

More Channels, More Choice: Messaging apps, chat, and social platforms now sit alongside voice, giving customers real choice in how, when, and whether they respond.

Low Tolerance for One-Way Communication: Rigid, one-way interactions such as static IVR menus increasingly frustrate users. Customers now expect conversations that feel responsive and human, especially for complex queries.

Preference for Hyper-Localization: Voice remains a strong engagement channel in India, particularly among regional language users. Customers respond better to communication that reflects their language and local context.

Number Series Stigma: Many customers associate unfamiliar number prefixes with unwanted calls. As a result, certain number series are often ignored or rejected by default, affecting answer rates and lead conversion.

3. Operational and Strategic Challenges

Caller Identity Fragmentation:
Caller ID may appear differently across telecom networks and devices. As CNAP and DLT frameworks continue to scale, some transitional inconsistencies in caller identity display remain across networks, an area where ongoing regulatory implementation will provide resolution.

Strict Use-Case Segregation:
Businesses must clearly separate promotional and service communication. The 140 series is restricted to promotional calls, while the 160 series is reserved for service interactions.

Restrictions on Cross-Selling:
Regulatory updates prohibit cross-selling during service calls made through the 160 series.

What These Shifts Mean for Voice

01 **Higher Expectations for Transparency**
DLT improves accountability but also raises expectations for clear identity and intent.

02 **Intent vs Behaviour Gap**
While 140/160 numbers clarify call intent structurally, most users do not actively distinguish between them.

03 **Identity as Trust:**
CNAP pilots could play a key role in improving customer trust and call acceptance.

04 **Recognition and Relevance:**
Calls that clearly communicate who is calling and why stand a better chance of being answered.

Voice is becoming more structured behind the scenes and more selective at the point of answer. In this environment, performance depends less on reach and more on recognition, relevance, and trust.

Section 3

Communication Channels at Play

Businesses today operate across a growing mix of communication channels - voice, SMS, WhatsApp, email, in-app notifications, etc. This section examines how Indian enterprises deploy these channels across different tasks, and how those choices align (or clash) with what customers actually prefer. By comparing usage patterns, task fit, and consumer expectations, we surface where channels complement each other, where they overlap, and where notable gaps exist between business intent and customer reality.

Key questions asnwered:

01

How are Indian businesses communicating today?

02

How do customers prefer to be contacted?

03

What's the task-by-channel breakdown?

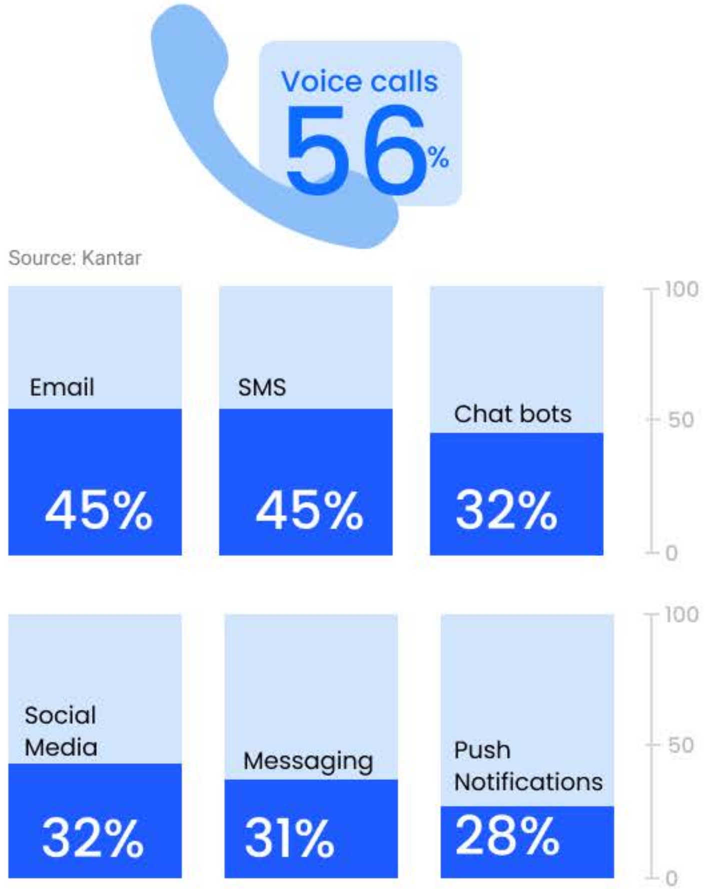
How are Indian businesses communicating today?

Businesses are using a mix of traditional and digital channels to reach customers.

While voice and email continue to anchor most interactions due to their clarity and reliability, larger enterprises have broadened their mix to include SMS, chat and social platforms.

Channel selection increasingly reflects organizational maturity — with Small and Medium Enterprises (SMEs) staying voice-heavy and Large Enterprises (LEs) adopting more diversified, multi-channel approaches to handle scale and customer expectations.

1. What's the most widely adopted customer engagement channel?



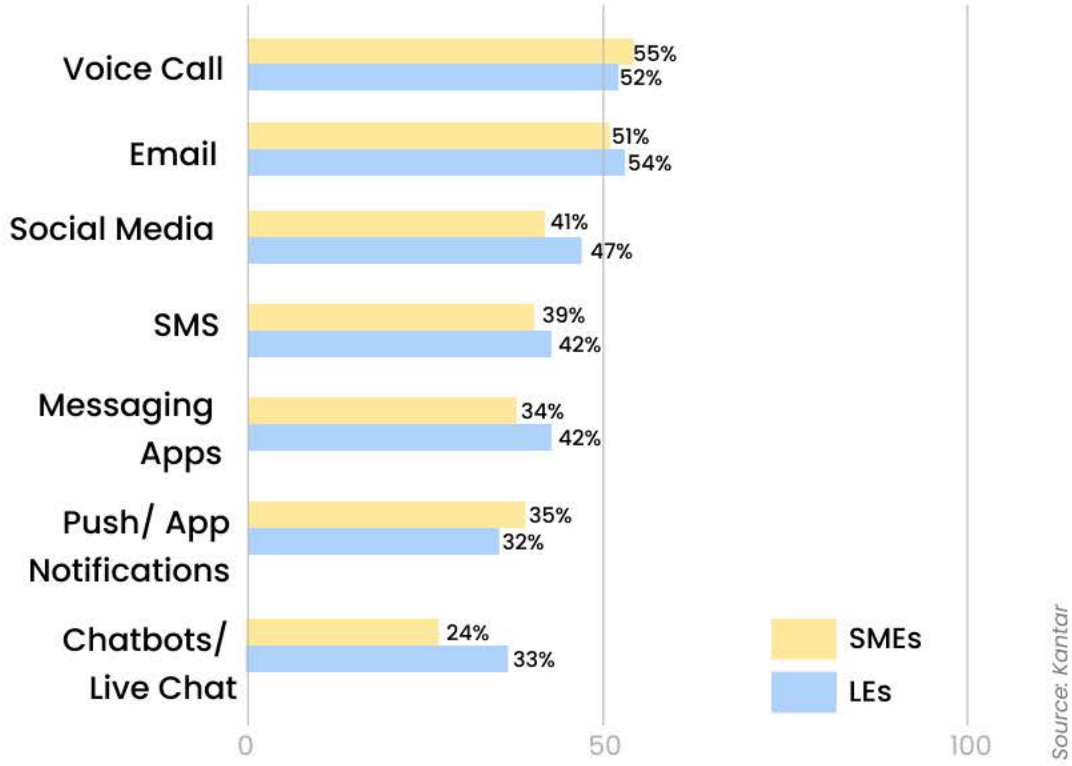
Voice dominates channel adoption

Voice calls outpace email and SMS, and are well ahead of chat, social, and push notifications.

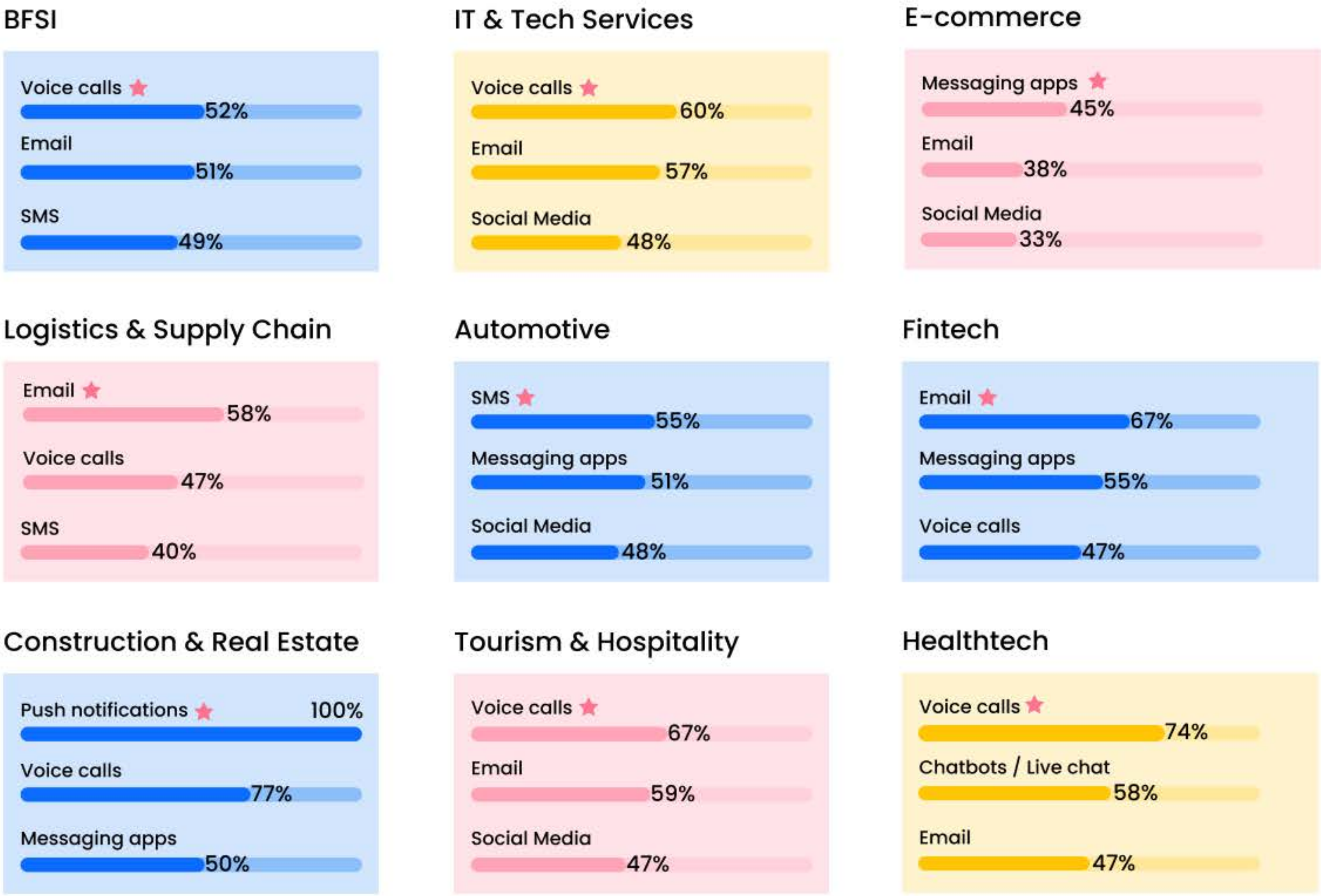
2. Which channels are used most frequently in day-to-day communication?

Across all org types, voice and email are not just adopted; they're used often.

Social media and SMS come next, while push notifications and chatbots see relatively less-frequent use.



3. What are the top 3 customer engagement channels adopted across industries?



Source: Kantar

Service-led industries lean on voice for complex interactions where human judgement and reassurance matter whereas operational industries rely on digital channels first for repeatable touchpoints that can be standardised.

Source: Kantar

Introducing

The Voice Adoption Index

Frequency alone doesn't tell us how strategically voice is being used by a business. To better understand true maturity in business calling, we created the **Voice Adoption Index.**

This is a single, composite score that tells us how deeply an organization has integrated voice calling into its customer engagement strategy. Instead of looking at just one metric, the Index combines five simple signals:

1. **Frequency:** How often voice is used
2. **Primary Channel Role**: Whether voice is the primary channel for key customer segments
3. **Infrastructure Depth**: How advanced the organization's voice setup is (human-led, IVR, AI)
4. **Growth:** Whether voice usage is growing or declining
5. **Use Case Preference:** How often voice is preferred across different customer use cases

Together, these factors show not just whether a company uses voice, but how strategically and confidently they rely on it.

At its simplest:

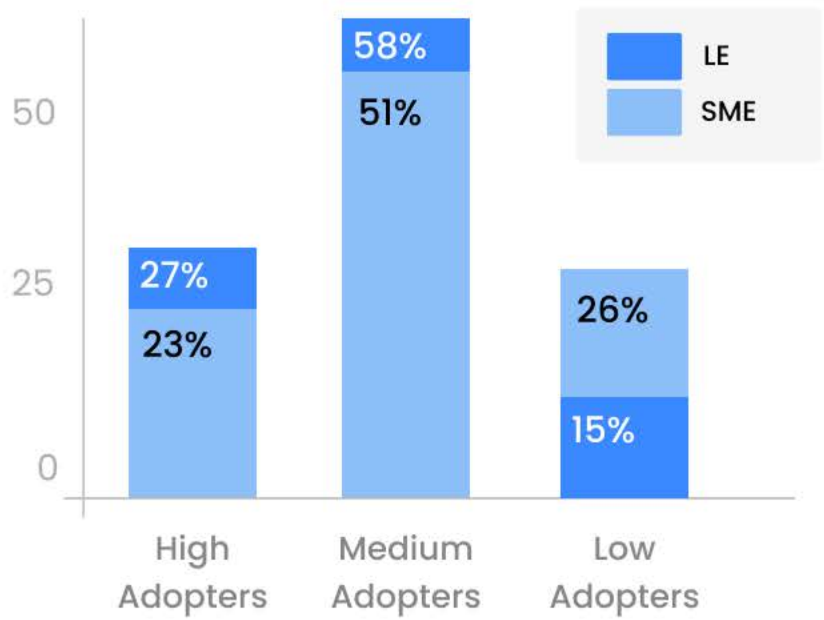
Voice Adoption Index = Usage + Role + Infrastructure + Growth + Preference

Each dimension contributes to the total score, which is then normalized to a 0–100 scale.

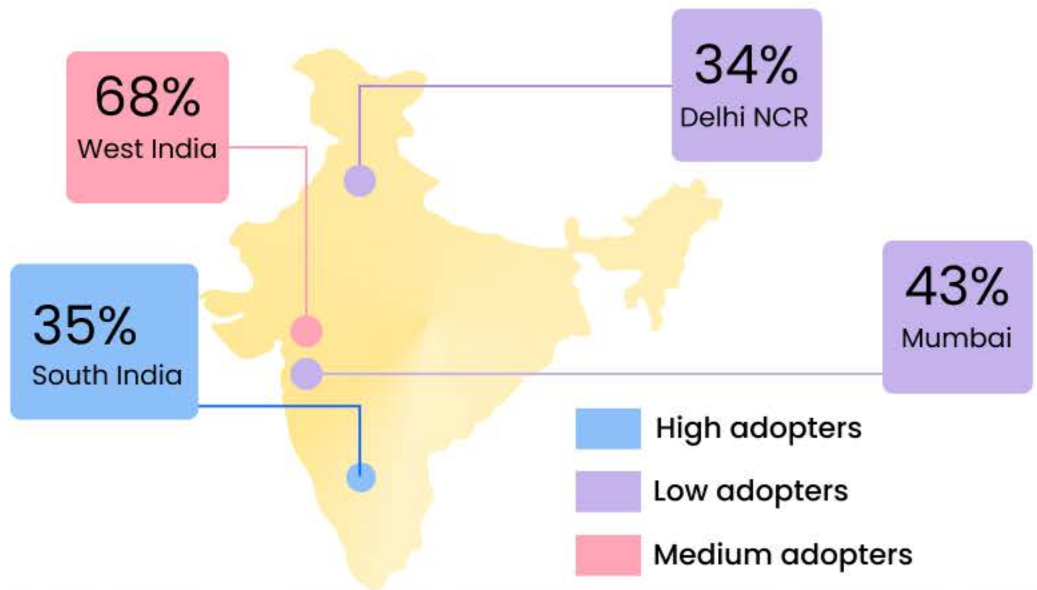
Based on the final score, organizations are classified as:

- **Low Adopters** – Limited, inconsistent or declining use of voice
- **Medium Adopters** – Regular use of voice with moderate maturity
- **High Adopters** – Strategic, growing, and infrastructure-backed voice usage

4. How does voice adoption vary by organisation size?



5. How does voice adoption vary by geography?



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Voice adoption is a function of organizational complexity and geography.

SMEs use fewer channels, while **Large Enterprises** diversify. Regional differences, like higher adoption in the South, reflect stronger cultural preference for voice and higher investment in customer relationship channels.

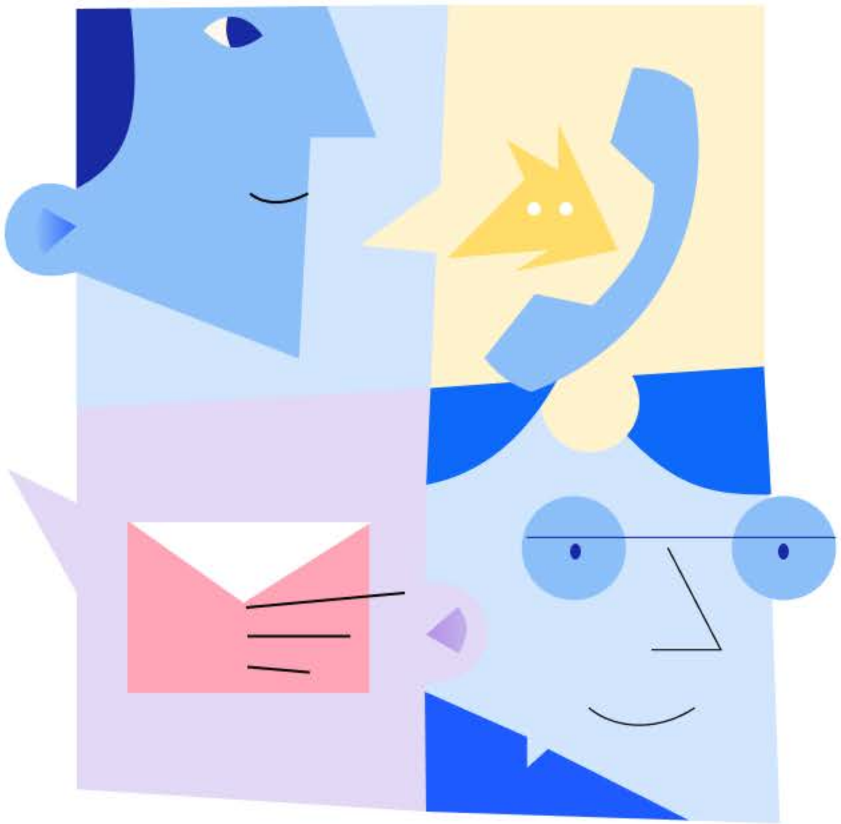
Source: Kantar

How do customers prefer to be contacted?

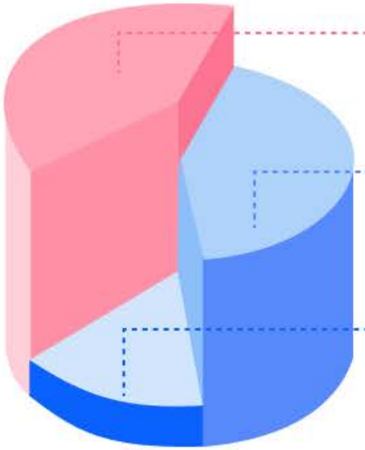
Customers prefer voice communication, but seek flexibility.

While voice calls remain the most preferred channel, especially for personal touch and clarity, customers also value convenience, speed, and language comfort. This makes omnichannel options like SMS, WhatsApp, and email essential.

Preferences also shift based on age, gender, occupation, and the type of communication — indicating that businesses need to adapt their outreach based on both customer profiles and context.



1. How important are voice calls to customers?



46% of consumers believe voice calls are important — but also want other options like WhatsApp, SMS, or email

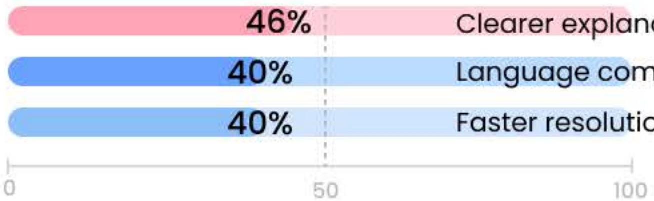
30% say voice calls are very important because they feel more personal and help build customer connection.

24% prefer non-voice channels most of the time.

Voice still dominates in building trust and explaining complex issues, but **multi-channel flexibility is non-negotiable.**

2. Why do customers prefer voice calls?

Top 3 benefits of voice calls:



Voice helps reduce friction and builds trust, especially where language, emotion, and quick issue resolution are involved.

Older audiences especially value clarity and language comfort.

Women and homemakers also cite faster issue resolution as a major driver.

Source: Kantar

3. Do voice preferences differ by age*, gender, or occupation?

Younger adults (21–25) are more open to voice calls

38% say voice is **very** important

Older adults (46–50) value voice too, but also lean on messaging channels for speed.

Working professionals prioritize voice more

45% say it is **important**

Women

24% Prefer **non-voice channels**

Voice calls matter across demographics — but channel balance should reflect the customer's age, occupation, and expectations of speed or clarity.

*as per NCCS age classfications. Source: Kantar

4. What are customers' channel preferences?

80% prefer voice calls

70% also value other channels like **SMS, WhatsApp, and email**

This reinforces the need for **omnichannel flexibility**, especially for **large enterprises** managing varied customer segments and use cases.

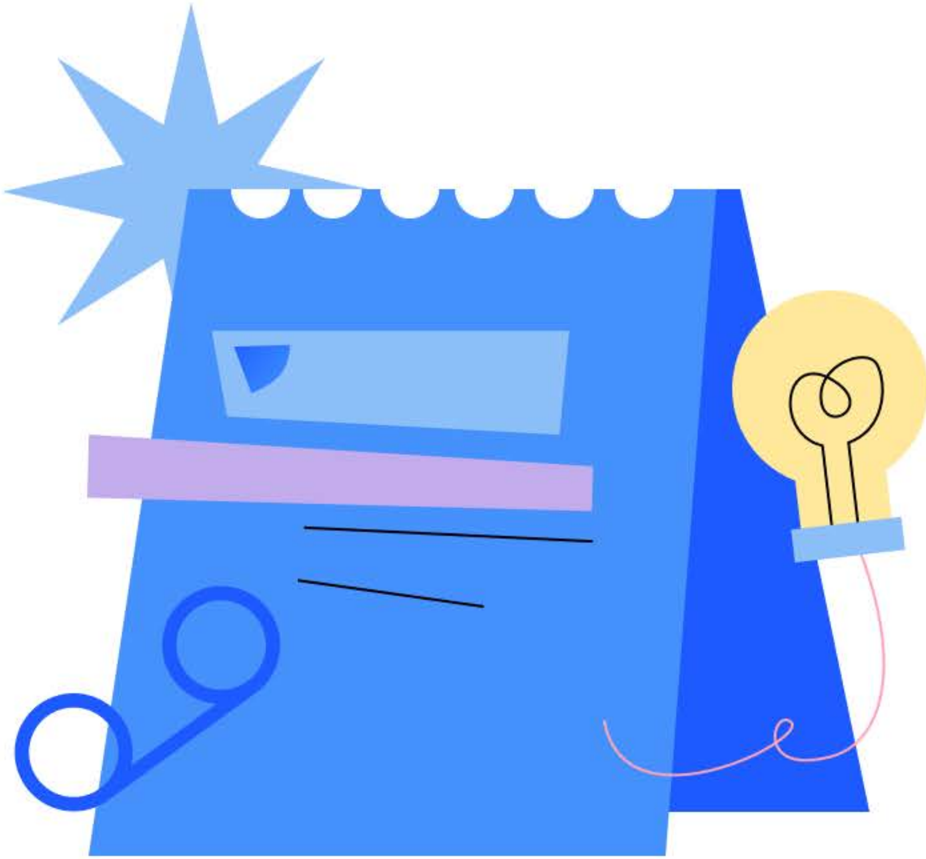
Context matters. **Push notifications, reminders, and confirmations might be best served** via SMS or email, while complex issues or high-value interactions demand a voice.

Source: Kantar

What’s the task-by-channel breakdown?

Businesses map channels to the nature of each customer task.

Voice is used for sensitive or urgent conversations, SMS for quick confirmations, email for detailed information, and messaging apps for light-touch updates. But proactive engagement and emerging channels remain underleveraged, signalling room for more deliberate, task-specific communication design.



1. What tasks do businesses prefer voice calls for?

Voice calling is mainly being used for reactive support and transactional updates, not proactive engagement.

Tasks that could improve long-term relationships, like re-engagement or setup guidance, are deprioritized.

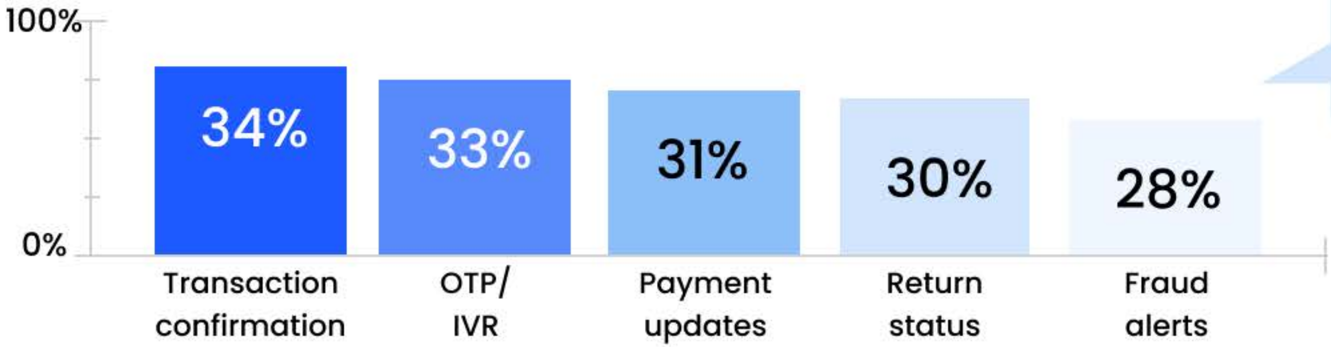
The Top 5

- **60%** Customer grievance support
- **55%** Billing
- **51%** Marketing/Offers
- **45%** Transaction confirmation
- **45%** Payment updates

The Bottom 5

- **22%** Loyalty program updates
- **20%** Product setup instructions
- **17%** Planned maintenance
- **14%** Inactivity nudges
- **13%** Sharing sensitive information

2. When is SMS the go-to channel?



SMS is ideal for time-sensitive, low-complexity tasks.

Its immediacy is unmatched for tasks like confirmations, OTPs, and alerts. But it's not considered useful for nuanced or interactive exchanges.

3. What's email best suited for?

- 40% Billing
- 38% Planned maintenance/ downtime
- 35% Shipping and delivery
- 32% Sharing sensitive information
- 30% Loyalty program updates

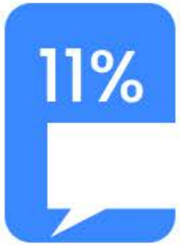
Email is a channel for documentation, detailed instructions, and future reference.

It is the go-to for communications that require length, nuance, or an audit trail. But it's not ideal for high-urgency or interactive support needs.

 |

4. Where do other channels fit?

Social media
Top use is for inactivity nudges



Messaging apps
Mainly used for re-engagement

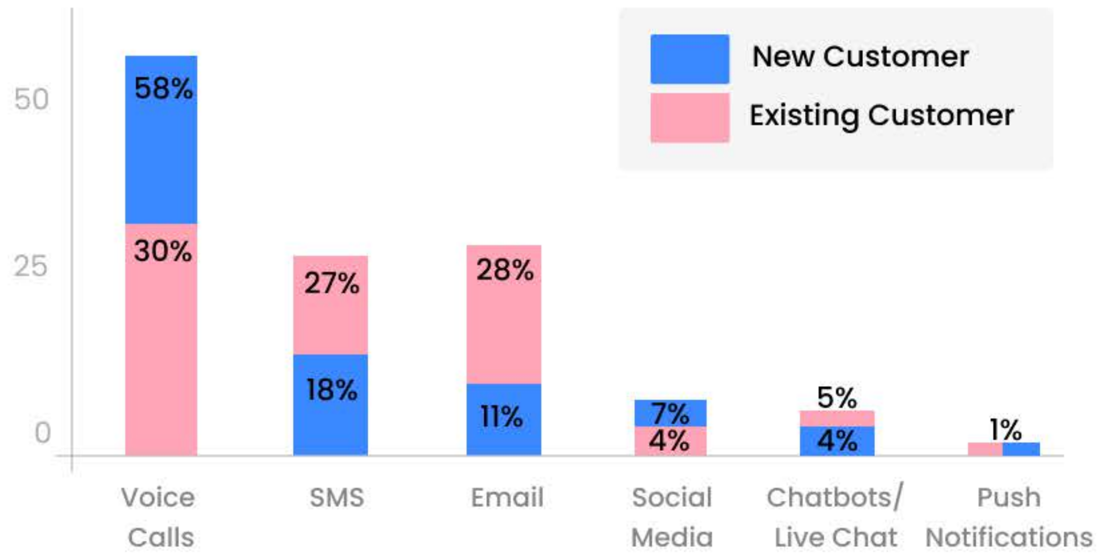
Chatbots
Surveys & feedback are primary use cases

Push notifications
Rarely preferred

These channels are still niche, mainly used for routine, impersonal communication.

But they hold untapped potential for rich media, self-serve help, and friendly re-engagement as digital behaviors evolve.

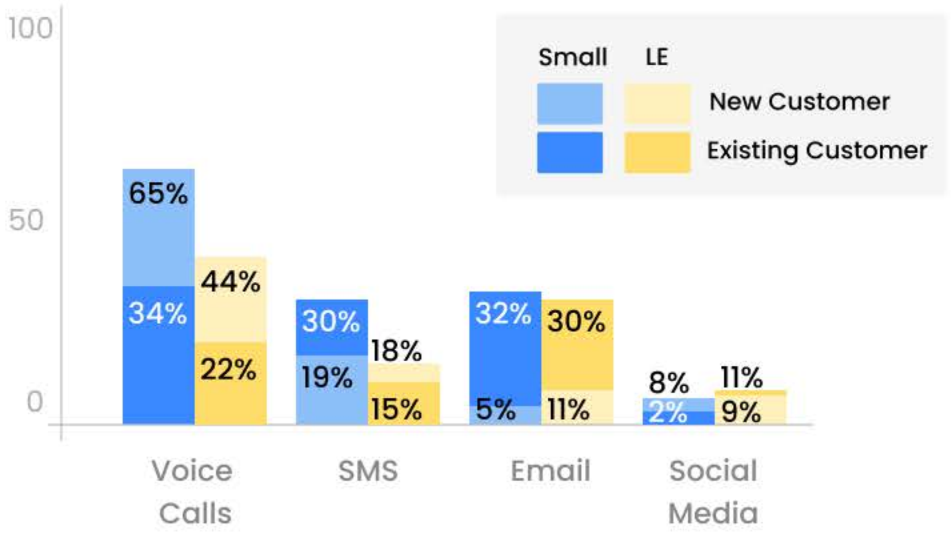
5. How does channel preference shift as customer relationships mature?



There's a clear handoff from voice to digital-first channels as customer relationships evolve.

But the shift is driven by efficiency, not preference. Customers still value voice for trust, yet businesses route them digitally to cut costs —underutilizing voice in moments where relationship depth or human connect still matter.

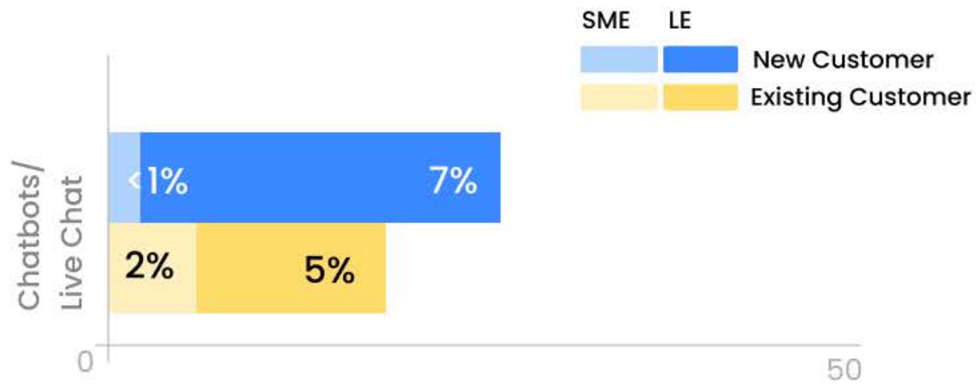
6. How does businesses growth change channel strategy mix?



As businesses scale, communication becomes more digital & efficient, but also less interactive.

- Voice remains central to new customer outreach, even for Large Enterprises.
- Existing customer engagement increasingly moves to digital channels like Email and Social—**reducing opportunities for contextual engagement and conversational depth.**

7. How widely are automated channels like chatbots and live chat being adopted?



Automated channels are yet to become a meaningful layer in customer communication.

- **LEs** are more likely to use automation for new customer interactions where scale and responsiveness matter.
- **SMEs** experiment more cautiously, often starting with existing customers.
- Low automation adoption leaves businesses **reliant on static digital channels** for ongoing engagement.

8. What patterns emerged across business leaders when asked about choosing communication channels?

01 Voice for Complex, High-Trust, Real-Time Needs

Across industries, leaders consistently use voice calls for **high-stakes situations** requiring empathy, clarity, or fast resolution.

> *"You can't build a relationship over a mail or a WhatsApp message, which is why it is our primary channel."*
> **— AVP, Centrum Health**

> *"In our category, the human touch is required — hence huge volume of calls."*
> **— Head of Customer Service, Healthkart**

02 Digital Channels for Routine, Low-Complexity Tasks

Leaders use digital channels to handle **simple, repeatable,** or **informational tasks** efficiently

> "For KYC verification, normally our financiers use the IVR channel. Similarly, for transaction confirmation, OTP is through IVR."
> **— Head, Customer Experience, Mahindra & Mahindra**

03 Emerging Hybrid Models

Leaders increasingly use a **"digital-first + human escalation"** model, combining digital channels with personalized voice support.

> *"In India, customers feel more comfortable when they hear somebody's voice."*
> **— Head, Customer Experience, Exicom Tele Systems**

04 Customer Context Drives Channel Choice

Leaders factor in **region, customer segment,** and **task type.**

> "Tier 2 and 3 prefer voice because of trust and limited digital comfort."
> **— Multiple respondents (validated across survey)**

Section 4

The Value of Voice

Voice continues to hold a unique place in customer communication, delivering clarity, empathy, and urgency in ways other channels struggle to match. This section examines why voice remains a high-trust, high-impact component of customer engagement across industries . It also explores the measurable outcomes linked to voice, including higher CSAT, improved retention, and faster resolution times, and compares its performance to other channels to understand where voice creates the most business value.

Key questions answered:

01

What shapes the business decision to choose voice?

02

Does voice drive measurable business impact?

03

How does it compare to other channels on key outcomes?

What shapes the business decision to choose voice?

Voice is selected primarily for moments where trust, judgement, and accountability matter, not just speed or scale.

Trust and brand perception emerge as the strongest drivers, closely followed by tone sensitivity, interactivity, and urgency. The weighting shifts by business size and sector. Larger Enterprises prioritise urgency, tone sensitivity, and measurable control, while SMEs use voice to reinforce credibility. Trust-led industries favour reassurance and brand perception, while others adopt voice when it delivers proof through analytics or cost efficiency.

1. What factors drive businesses to choose voice?

Top factors for choosing voice calling:

41%	Trust & Brand Perception
38%	Tone & Sensitivity
37%	Interactivity Required
36%	Urgency
34%	Compliance/Legal Needs

Voice dominates when trust, judgement, and accountability are required.

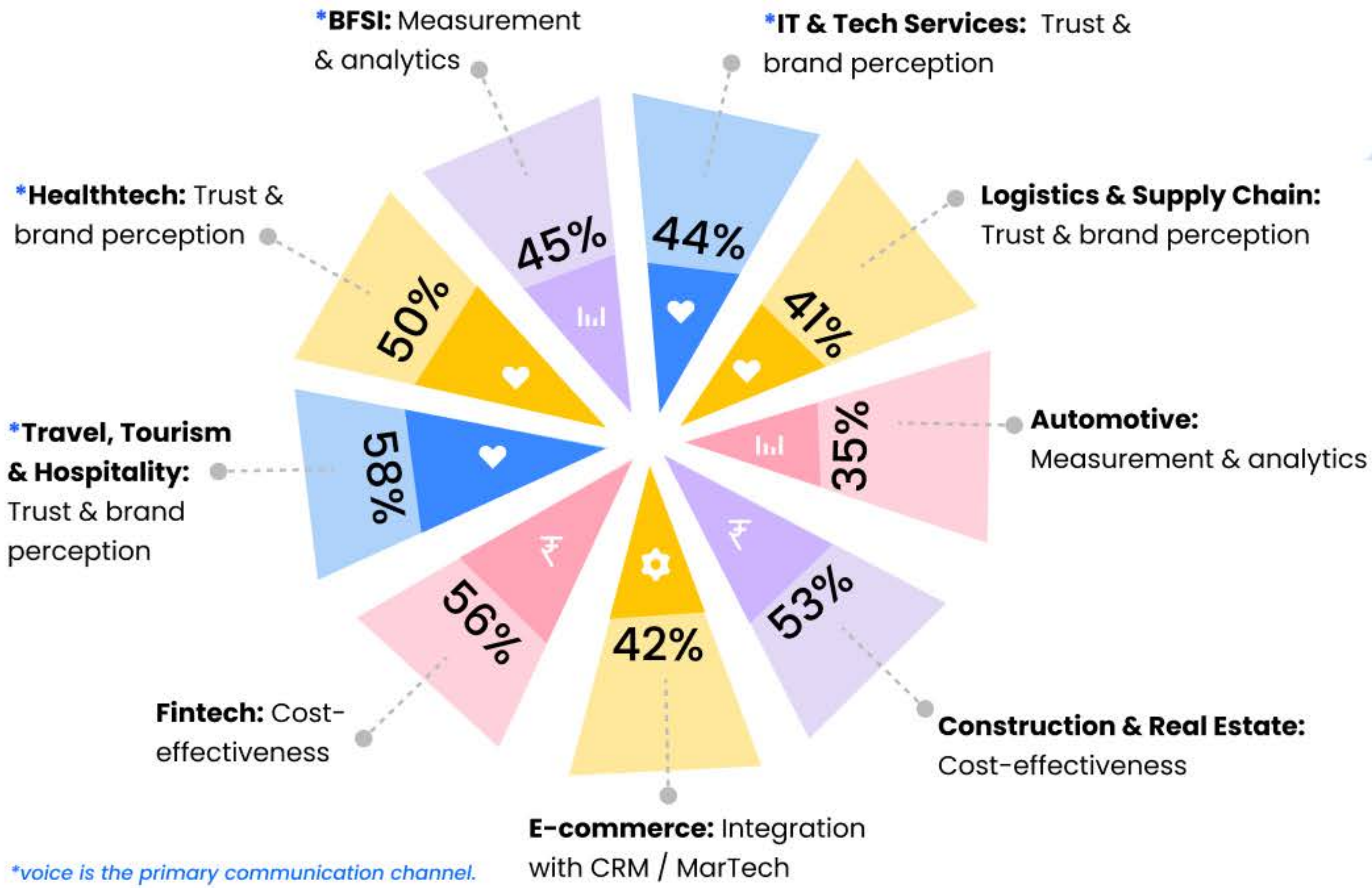
Trust and brand perception lead the decision, signalling that voice is chosen more for reliability than efficiency.

2. How do these factors vary by organisation size?

Factor	SME	LE
Trust & Brand Perception	40%	43%
Tone & Sensitivity	35%	53%
Interactivity Required	36%	39%
Message Urgency	34%	48%
Measurement & Analytics	35%	40%
Cost Effectiveness	34%	42%
Message Complexity	32%	41%
Compliance/Legal	34%	34%
Reach & Penetration	32%	36%
Scalability	30%	44%
Integration with CRM/MarTech	29%	32%

Source: Kantar

3. How do these factors vary by industry?



**voice is the primary communication channel.*

Even when voice isn't the primary channel, the reason to use voice is because it delivers either trust or measurable/ controllable outcomes.

- **Industries choose voice for one of four reasons:** Trust, Proof (analytics), Efficiency (cost), or Stack-fit (Integration).
- **Voice-led sectors like IT, Health, BFSI skew trust-first:** Other industries justify voice only when it's measurable, cheaper, or integrated.

Source: Kantar

Does voice drive measurable business impact?

Voice consistently outperforms other channels on the outcomes that shape customer experience.

Businesses see higher trust, faster resolution, and stronger satisfaction when interactions happen over voice, especially in moments requiring empathy or clarity.

Even with higher interaction costs, the returns are clear — voice remains the strongest driver of connection, loyalty, and confidence, making its business impact both distinct and measurable.

1. Which top 3 metrics do organizations track most on voice across industries?

BFSI
- Response rate ★ 73%
- Emotional reassurance 68%
- Trustworthiness 60%

Automotive
- Response rate ★ 67%
- Personal connection 51%
- Trustworthiness 51%

Fintech
- Response rate ★ 74%
- Emotional reassurance 56%
- Trustworthiness 56%

IT & Tech Services
- Response rate ★ 67%
- Personal connection 64%
- Emotional reassuranc 60%

Construction & Real Estate
- Response rate 77%
- Personal connection 77%
- Time to resolution 77%

Healthtech
- Response rate ★ 89%
- Emotional reassurance 84%
- Customer satisfaction score 84%

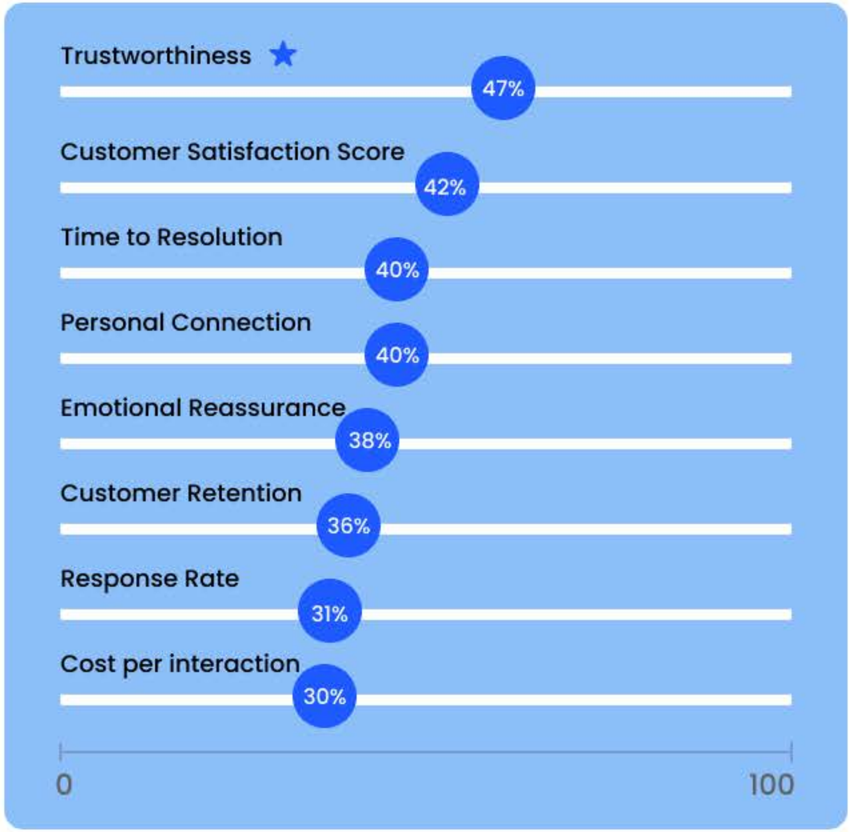
Logistics & Supply Chain
- Emotional reassurance ★ 68%
- Trustworthiness 64%
- Response rate 63%

E-commerce
- Response rate ★ 85%
- Personal connection 73%
- Time to resolution 73%

Tourism & Hospitality
- Response rate ★ 74%
- Personal connection 71%
- Time to resolution 67%

Source: Kantar

2. Which key metrics does voice usage impact most?



Voice outperforms every other channel on **soft metrics that drive hard results** — satisfaction, loyalty, and trust. Although cost per interaction is higher, leaders agree it's a **high-return channel.**

> CSAT for resolution is the highest on voice among all three channels."
>
> Vineet Panwar, Business Head, Team Computers

> "Where an emotional connection is needed, voice is most preferred."
>
> Suraj Shetty, Head of Operations, Ring

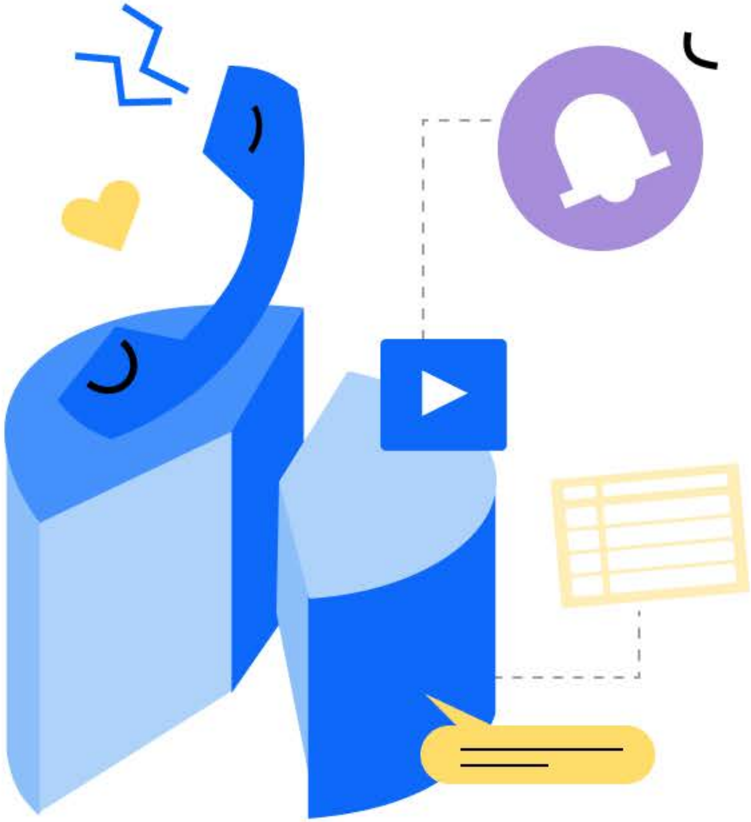
> "Voice is the best choice when the customer is hyper... situations of urgency need quick voice support"
>
> Customer Service Head, L&T Mindtree

Voice vs other channels on key outcomes

Voice stands apart from digital channels when the goal is depth, clarity, and customer confidence.

Channels like SMS, email, and chat excel at quick updates or transactional touchpoints, but they rarely match voice in resolving complex issues or building emotional reassurance.

Across industries, voice consistently delivers higher satisfaction and trust — making it the strongest performer when outcomes depend on human connection and real-time judgment.



1. Which metrics do organizations track on voice vs. other priority channels across industries?

BFSI

Voice calls: Response rate
73%

Email: Customer retention/loyalty
48%

SMS: Customer Satisfaction Score
64%

Automotive

Voice calls: Response rate
67%

SMS: Customer Satisfaction Score
51%

Messaging apps: Time to resolution
19%

Fintech

Voice calls: Response rate
74%

Email: Customer retention/loyalty
65%

Messaging apps: Cost per interaction
26%

IT & Tech Services

Voice calls: Response rate
67%

Email: Response rate
60%

Social media: Customer retention
24%

Construction & Real Estate

Voice calls: Response rate
77%

Messaging apps: Customer satisfaction
28%

Push notifications: Emotional reassurance
2%

Healthtech

Voice calls: Response rate
89%

Email: Response rate
68%

Chatbots / Live chat: Cost per interaction
39%

Logistics & Supply Chain

Voice calls: Emotional reassurance
68%

Email: Time to resolution
69%

SMS: Time to resolution
56%

E-commerce

Messaging apps: Emotional reassurance
23%

Social media: Customer Satisfaction Score
23%

SMS: Trustworthiness
38%

Tourism & Hospitality

Voice calls: Response rate
74%

Email: Cost per interaction
43%

Social media: Customer retention
24%

Voice is chosen for trust, but evaluated on cost & speed. Industries adopt voice for credibility, yet measure it on efficiency—making a relationship channel look inefficient against transactional metrics. This misalignment undervalues voice's real impact.

Source: Kantar

2. How do business leaders rate voice vs other digital Channels when it comes to KPIs?

Interviews revealed a consistent pattern: voice outperforms digital channels on high-value KPIs, while digital channels excel on efficiency metrics. Leaders see both as essential, but for different reasons.

Voice leads on trust, clarity, and emotional KPIs

Voice is rated highest for KPIs that require **human tone, reassurance, and real-time problem solving**, especially when interactions are sensitive, high-stakes, or urgent.

Digital channels lead on reach, speed, and cost

SMS, WhatsApp, and email dominate for notifications, OTPs, alerts, and documentation, with leaders highlighting their scalability and cost-efficiency.

Hybrid communication delivers the strongest blended KPI performance

Leaders increasingly rely on **digital-first + voice escalation** models. Digital handles the initial touchpoint; voice ensures completion and clarity, especially in Tier 2/3 markets and KYC processes.

Put simply, KPI strengths align with the nature of the channel.

- **Voice** → higher CSAT, trust, resolution quality, loyalty, emotional reassurance
- **Digital channels** → stronger on response speed, instant reach, automation efficiency, cost per interaction

Source: Kantar

Section 5

What's Holding Back Voice Calling

Voice calling remains one of the most personal and direct communication channels available to businesses, but its effectiveness has been steadily eroded by a mix of trust, experience, and infrastructure failures. Customers today are more cautious about answering calls from unknown or suspicious numbers, while businesses struggle with declining connect rates and operational inefficiencies that stem from outdated systems. This section discusses these challenges through both customer and business lenses, and highlights emerging solutions that aim to restore credibility and reliability to voice communication at scale.

Key questions answered:

01

What's breaking customer trust in voice calling?

02

What are businesses worried about?

What’s breaking customer trust?

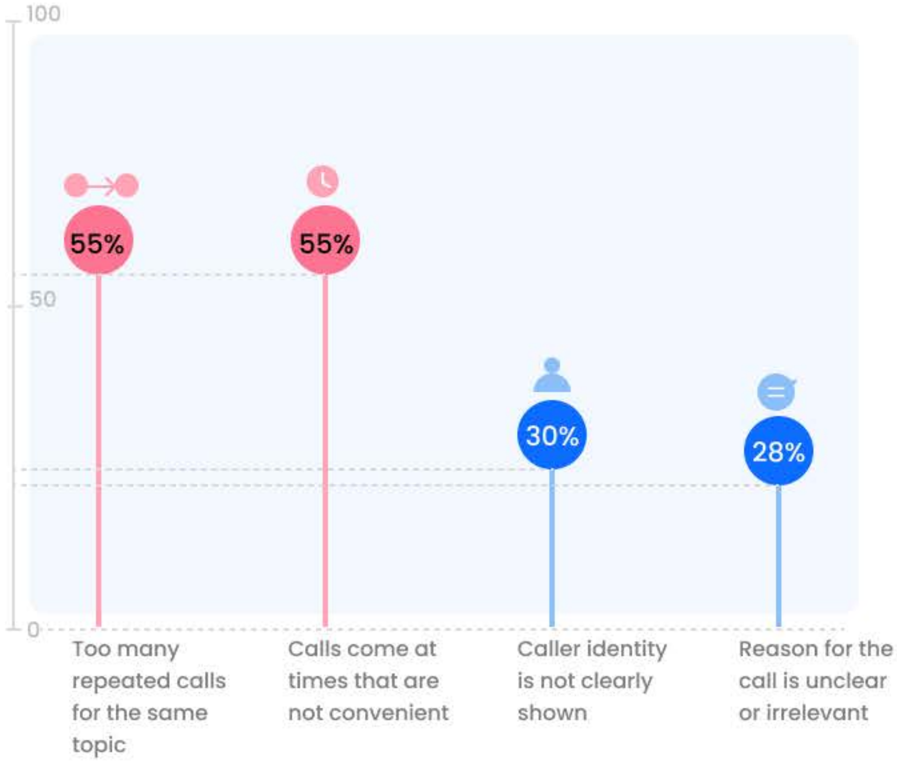
Customer trust in voice calls is eroding, driven by uncertainty and repeated friction.

Spam, fraud, unclear caller identity, and poorly timed outreach have created a “don’t pick up” mindset that affects even legitimate businesses.

As calls become harder to trust and easier to avoid, customers place higher value on transparency, timing discipline, and credible identity cues. It signals that the foundation of voice now depends on visibility and context.

1. What are the top customer concerns when receiving calls from businesses?

Poor discipline in outreach timing and caller ID transparency directly damages customer experience.



1a. Who feels these issues most?

Trust erosion cuts across demographics

Older and mid-income users are most sensitive to unclear identity, making strong verification signals essential for rebuilding trust.

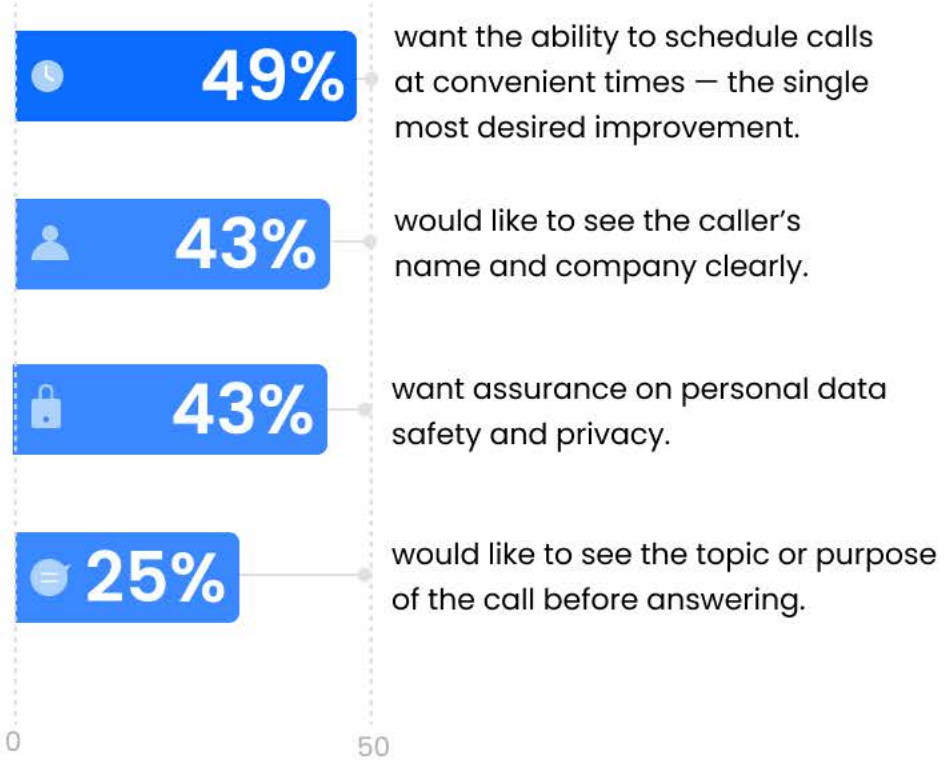
both flag **call-timing** and **repetition** as major pain points.

Source: Kantar

2. What would improve the business voice calling experience for consumers?

Consumers want flexibility, clarity, and security.

Call scheduling flexibility and transparent caller details are the **strongest signals** for restoring trust.



2a. Which trust signals matter most across different consumer segments?

Different audiences prioritise different trust signals when deciding whether to engage with business calls:

Call scheduling flexbility — 21–35 y/o — Working professionals, Male

Privacy & data security reassurance — 36–45 y/o — Female

Caller identity clarity — 46–50 y/o — Homemakers

Restoring trust in businesses calls requires balancing customer expectations around flexible timing, privacy, and caller identity.

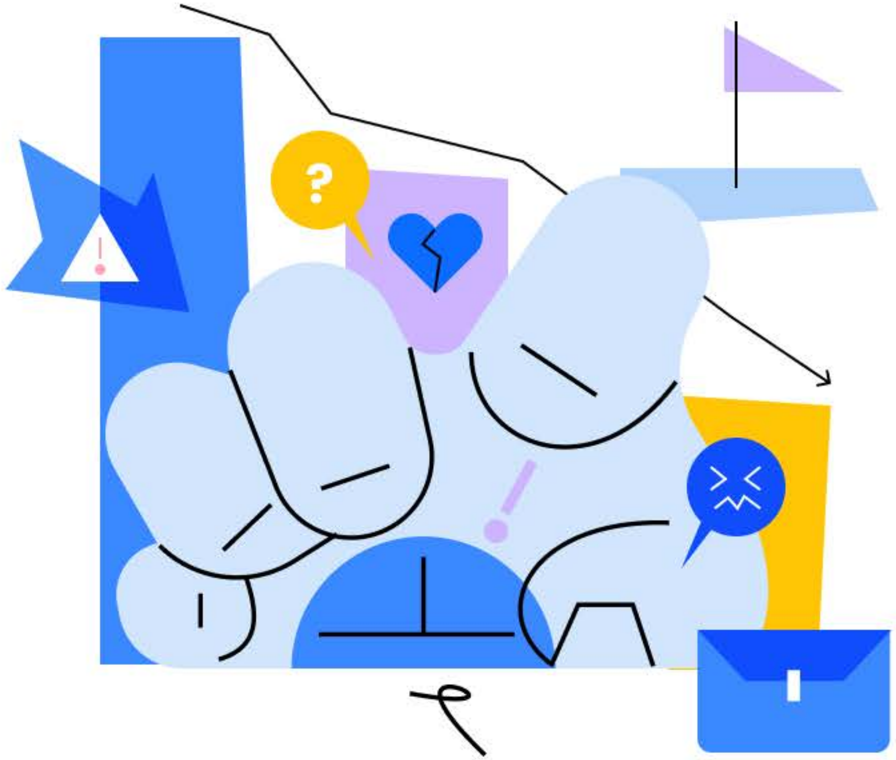
Source: Kantar

What are businesses worried about?

Businesses are struggling to maintain reach and reliability in a channel defined by rising complexity.

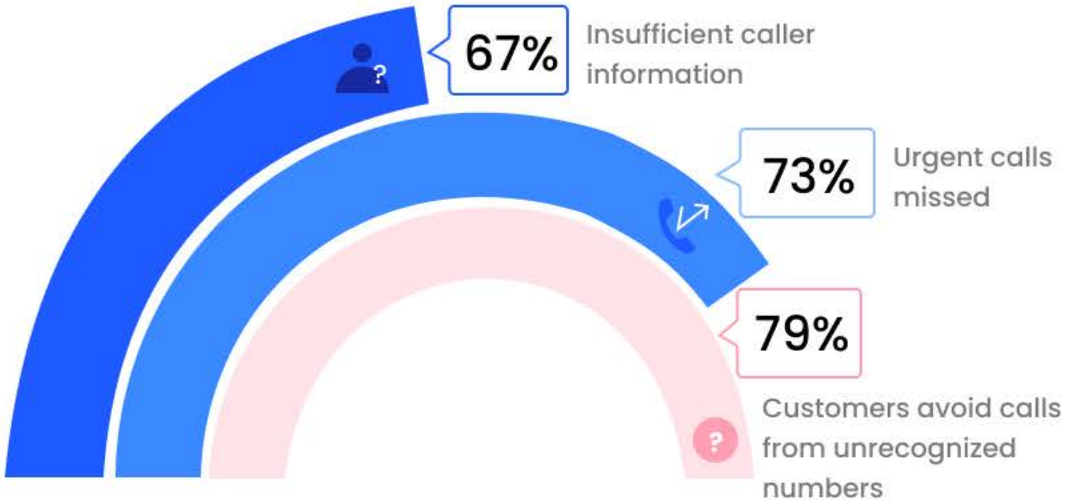
Leaders point to falling answer rates, spam mislabeling, operational limits, and regulatory constraints that make scale harder to achieve. Even committed voice adopters face challenges with capacity, cost, and call quality.

It reveals that the business-side barriers mirror the customer-side trust gaps, and together threaten the productivity of voice as a channel.



1. What's holding businesses back from using voice channels effectively?

Top challenges



Trust remains both voice's greatest strength and biggest risk.

Caller ID and branded verification are key to sustaining adoption and call completion.

Source: Kantar

2. How do these challenges vary by voice adoption levels?

Voice challenges evolve with adoption: beginners face trust barriers, advanced users face execution gaps.

Low adopters

82%

Customers avoid answering calls from **unrecognized numbers**

Medium adopters

67%

Insufficient information available about calling businesses

High adopters

79%

Urgent or important calls may be missed or ignored, which can lead to lost business opportunities

Trust and transparency are the top two threats to voice effectiveness

Even high-adoption businesses face reach and reliability issues that drag down answer rates.

Source: Kantar

3. What other voice-channel barriers do businesses experience?

Business leaders highlighted four consistent barriers:

01
Regulatory limits

Leaders noted that as regulatory frameworks evolve, ensuring **consistent implementation across operators and fraud-detection systems** will be key to maintaining call connect rates for verified businesses.

"Third party apps flagging the number with their own comments like spam, suspected spam."

— Jimmy Joshi, Senior Manager, Kotak Securities

02
Capacity constraints

Dialer limits, repeat attempts, and time-bound calling windows restrict scale.

"Reaching out repeatedly becomes costly."

— Head, Customer Experience, Exicom TeleSystems

03
High operational costs

Cost increases due to **repeated attempts, mislabeling, and agent load.**

"Systems cost more than other channels, and if agents are busy, the customer waits."

— Head, Customer Service, Healthkart

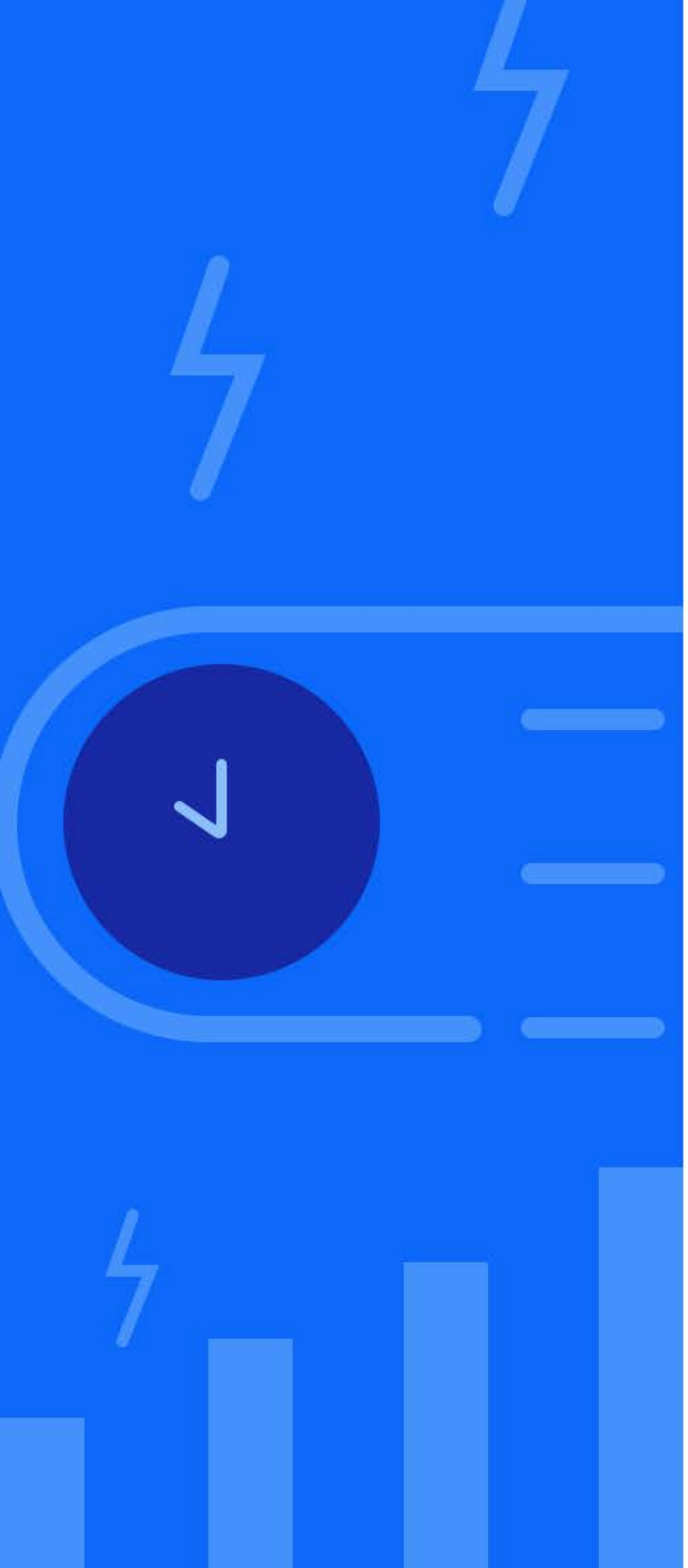
04
Poor Call Quality / Connectivity

Network issues lead to missed or dropped calls, especially for urgent interactions.

"Urgent or important calls may be missed or ignored."

— Sandeep Duggal, Regional Head, Quikr

Source: Kantar



Section 6

Innovation & The Future of Voice

As voice evolves from a purely human-led channel to a more intelligent, trust-driven ecosystem, Indian enterprises are beginning to explore advanced capabilities that reshape how calls are initiated, authenticated, and experienced. This section examines the emerging features gaining traction. It also looks at how investment priorities differ across SMEs and large enterprises, and highlights the broader innovation themes shaping AI-assisted customer communication.

Key questions asnwered:

01

What innovations are businesses ready for?

02

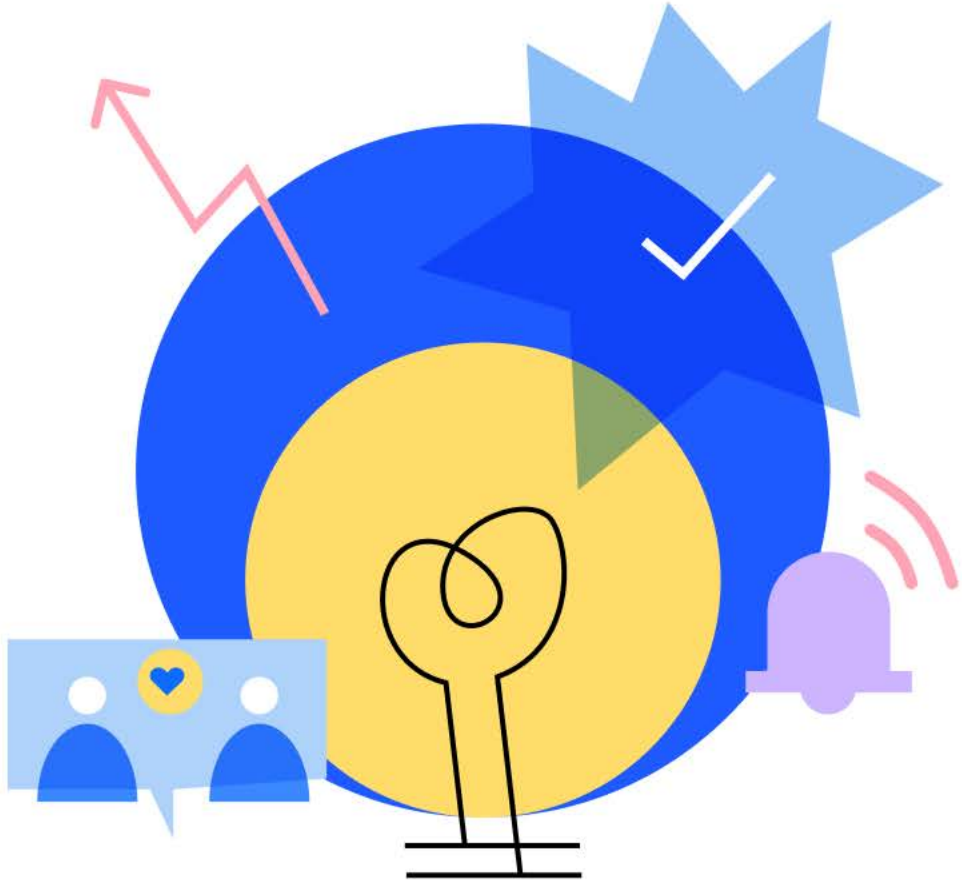
Where are enterprises investing?

What innovations are businesses ready for?

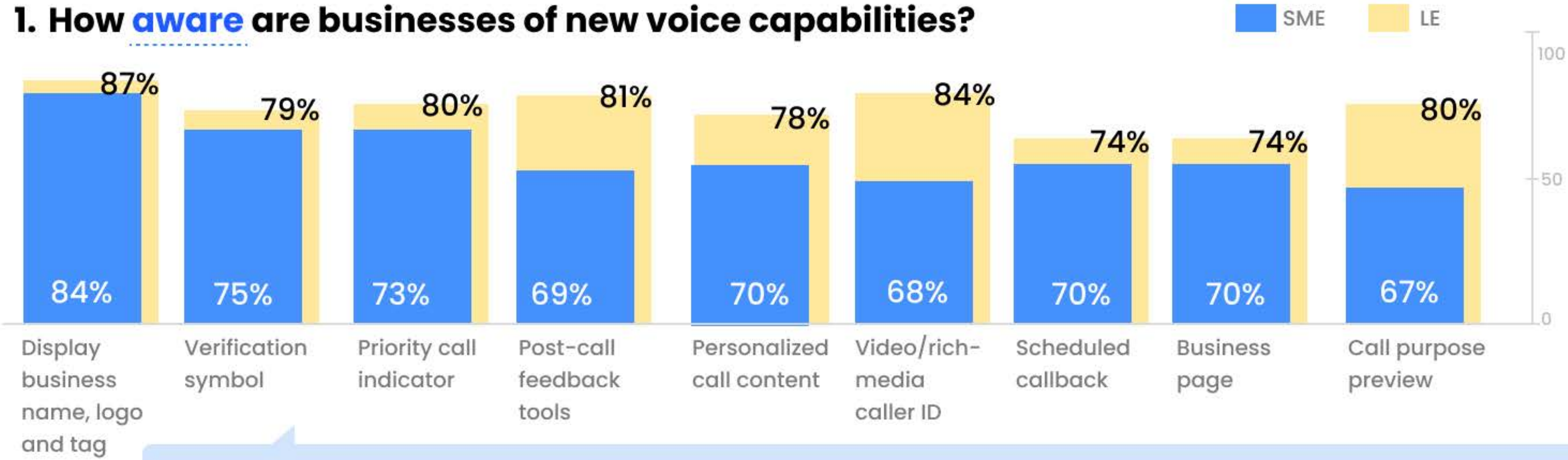
Businesses are showing strong appetite for next-generation voice features built around trust and transparency.

Awareness of branded caller ID, verification symbols, and purpose previews is high; with large enterprises especially ahead in readiness and interest.

While functional features like personalization or rich media are gaining traction, the clearest signal is that businesses want innovations that make calls more credible, more contextual, and easier to trust.



1. How aware are businesses of new voice capabilities?



Caller ID branding and verification are almost universal, with LEs ahead across categories.

2. Which voice features are actively used by businesses today?

- 74% Display business name, logo and tag
- 57% Verification symbol
- 52% Business page
- 51% Scheduled callback
- 51% Post-call feedback
- 50% Priority call indicator
- 50% Personalized call content
- 49% Video/rich-media caller ID
- 48% Call purpose preview

Branded Caller ID leads by a wide margin.

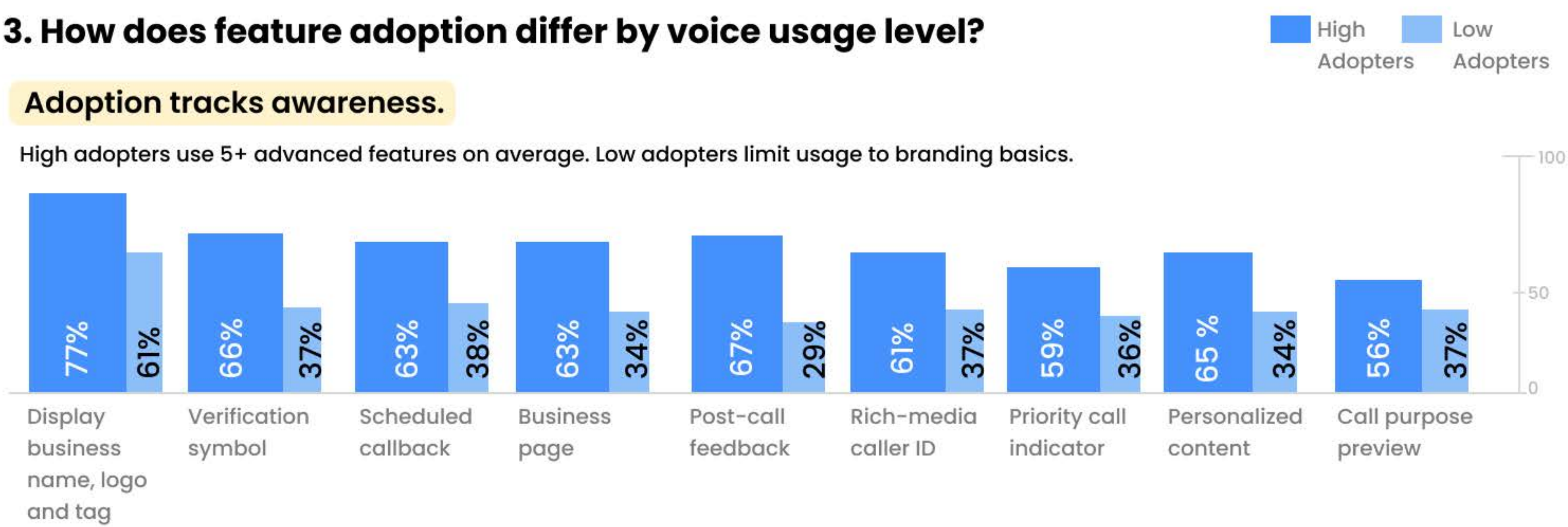
Moderate adoption of other features indicates a heavier reliance on basic trust features.

Source: Kantar

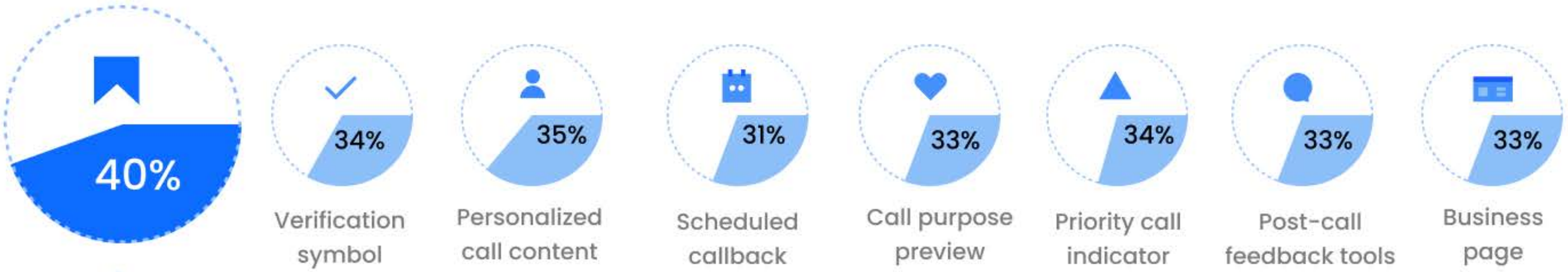
3. How does feature adoption differ by voice usage level?

Adoption tracks awareness.

High adopters use 5+ advanced features on average. Low adopters limit usage to branding basics.



4. Which voice features are businesses most interested in adopting?



Branded caller ID tops a high-interest list

Source: Kantar

Introducing

The Feature Engagement & Interest Indices

To understand how businesses adopt new voice capabilities, we created two complementary indices. These indices capture both **current feature usage** and **future investment intent**. Together, these indices help us understand which voice features businesses are already deploying and where future growth may emerge.

1. **Feature Engagement Index**

   Measures how widely a feature is currently used by businesses.

   At its simplest:

   Feature Engagement Index =
   Number of businesses using the feature ÷ Total respondents

   Normalized to a 0–100 scale

2. **Feature Interest Index**

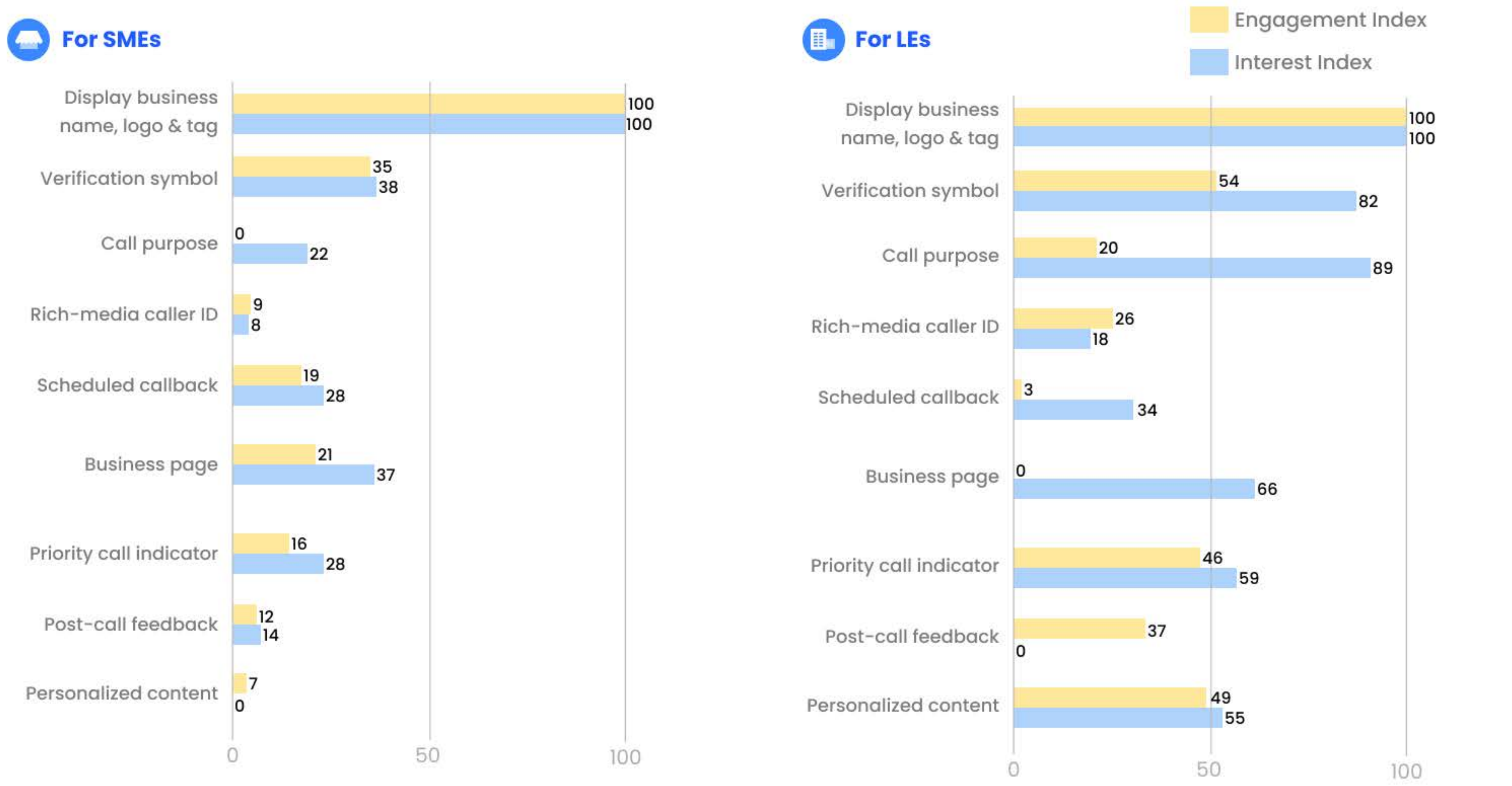
   Measures how strongly businesses want to adopt or invest in a feature.

   At its simplest:

   Feature Interest Index =
   Interest + Expected Impact + Investment Intent

   Each dimension contributes to the total score, which is then normalized to a 0–100 scale.

5. What does feature engagement vs. feature interest reveal about business behaviours?



Source: Kantar

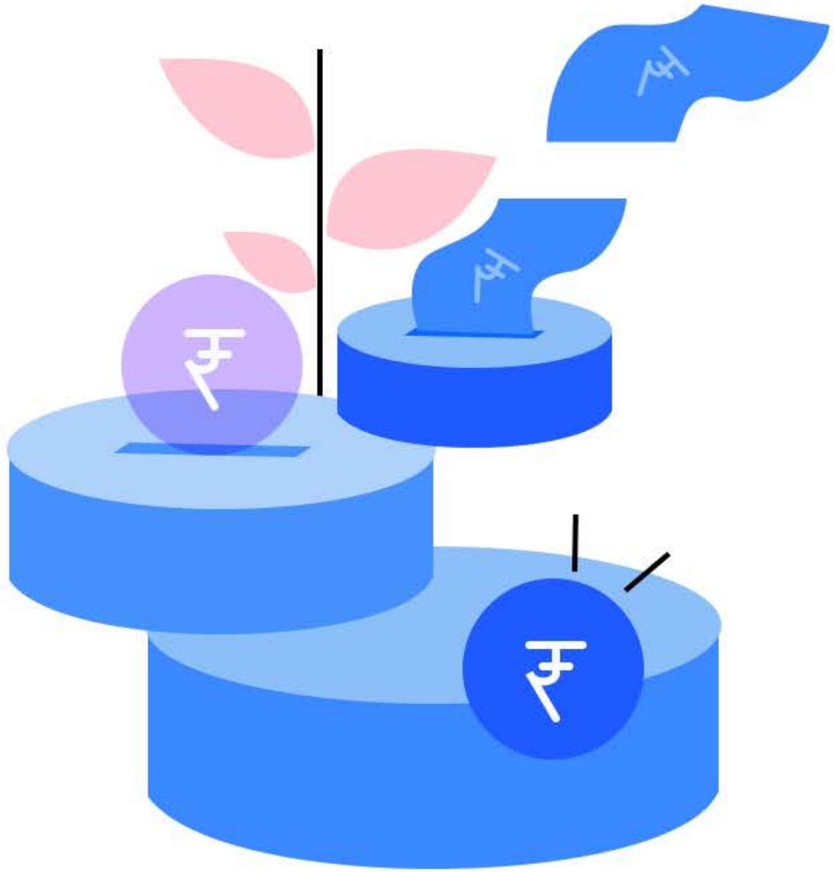
SME adoption broadly tracks their interest in new features, reflecting immediate operational use. Large enterprises show stronger demand than current deployment, suggesting implementation friction.

Where are enterprises investing?

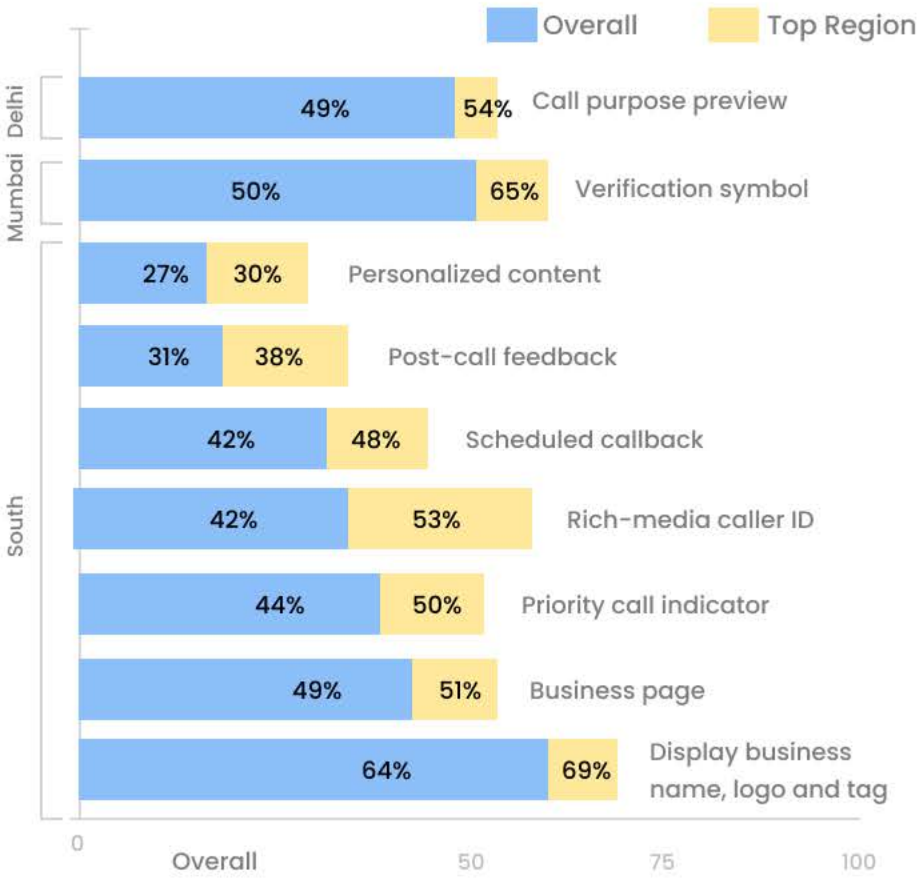
Investments are gravitating toward features that strengthen identity, clarity, and call recognition.

Across regions and business sizes, enterprises are prioritizing branded caller ID, verification, and purpose previews. It indicates a focus on rebuilding trust at the start of the interaction.

SMEs emphasize visibility, while large enterprises lean into automation and callback features, reflecting different maturity levels and adoption goals.



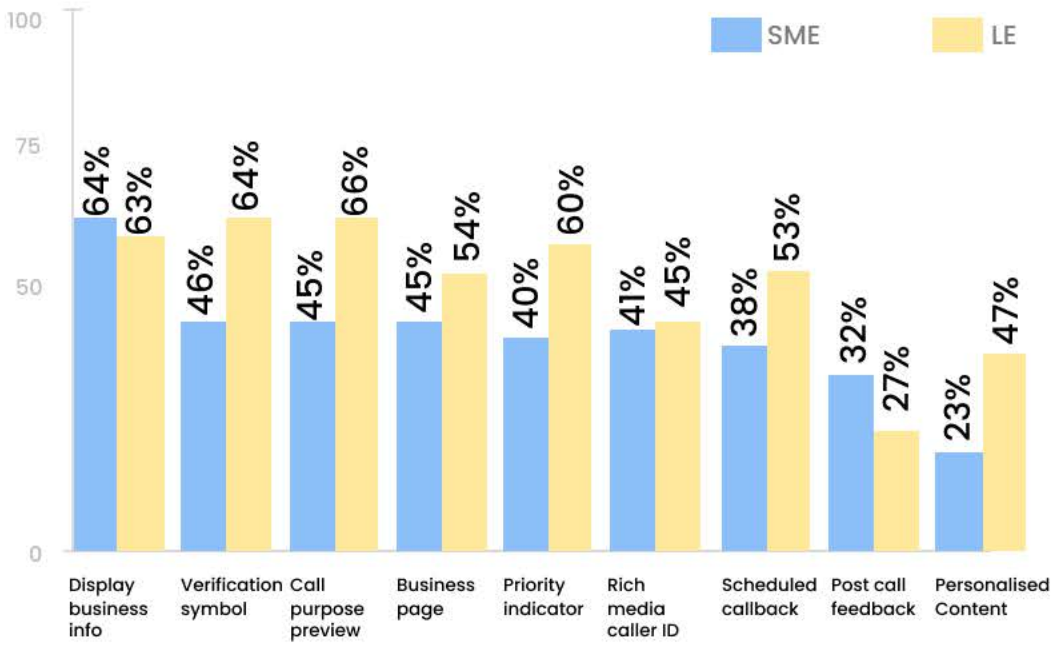
1. Where will businesses across the country invest next?



Trust and transparency dominate the roadmap.

However, this investment direction comes in sharp contrast to features consumers want → consumers have indicated scheduled callback facility as their most preferred feature.

2. How do these investments look across businesses sizes?

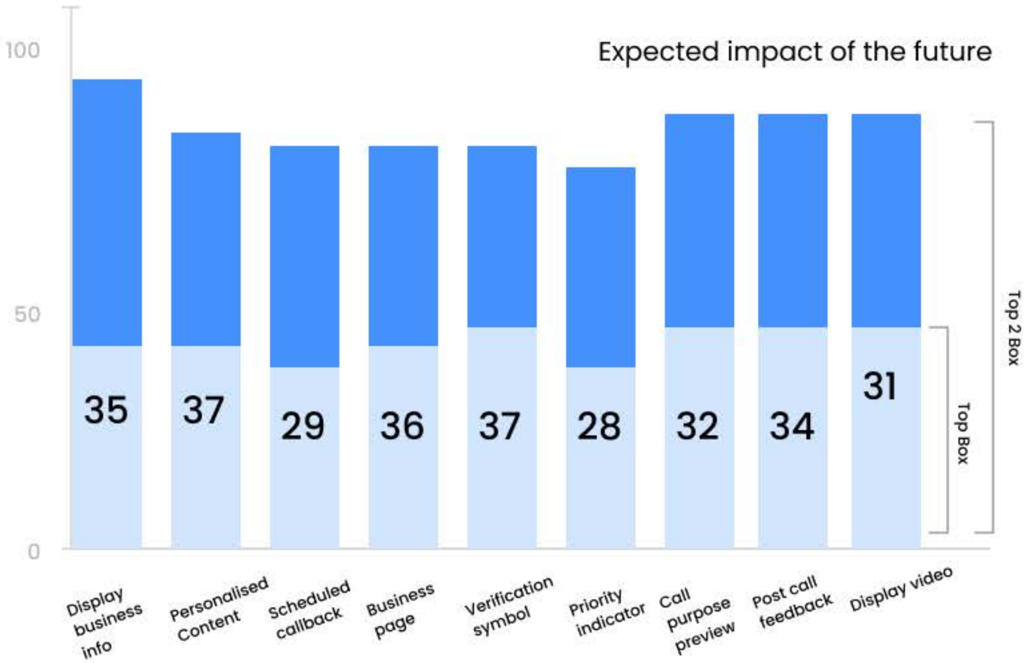


Bigger organizations are investing beyond baseline trust

Where SMEs are investing in proving legitimacy (branding, verification), LEs are optimizing customer convenience and control. Size determines whether you're earning trust or enhancing experience.

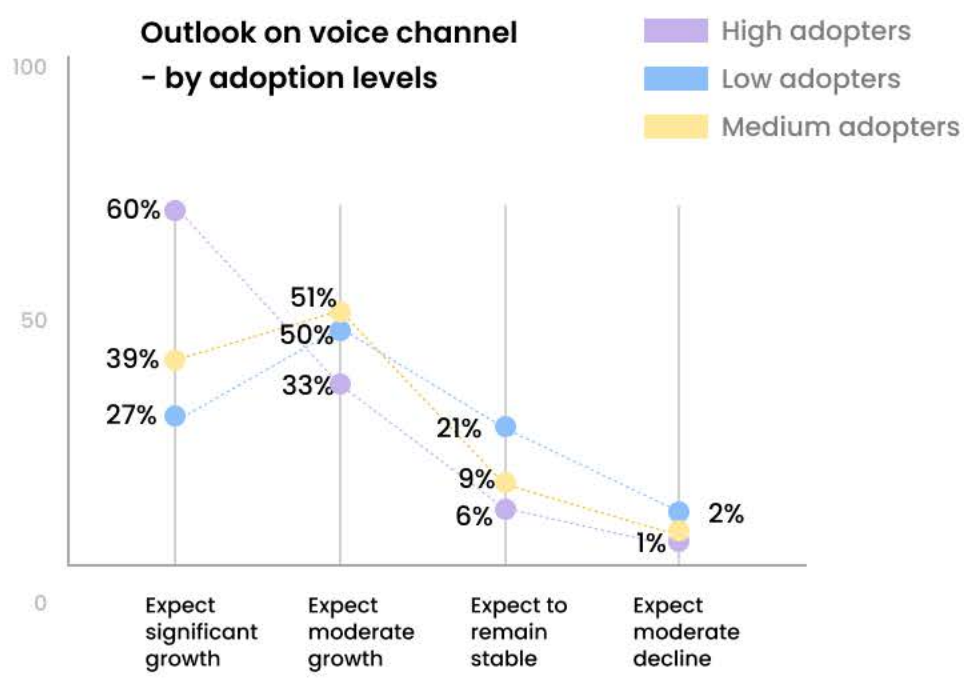
Source: Kantar

3. How much do businesses expect these feature investments to impact customer engagement outcomes?



Enterprises see the biggest engagement lift coming from trust-led and personalized features, confirming where impact is highest.

4. What is the general outlook for growth through voice across businesses?



High adopters expect strong growth; low adopters remain cautious. It reveals both momentum and a clear education gap.

Source: Kantar

5. What is the perception of voice features across business leaders?

Leaders view voice features through two key value drivers: trust and convenience. Advanced features are appreciated when they integrate seamlessly with existing systems.

1. Trust-Building Features

Identity + Verification

Enterprises see the biggest engagement lift coming from trust-led and personalized features, confirming where impact is highest.

"Customers now have a clear idea of who is calling them and why — leading to smoother conversations and quicker transactions."

Vidit Gupta,
Associate Program Manager, Spinny

2. Convenience

Scheduled Callbacks

Highly valued across roles for reducing missed calls and matching customer availability.

"Callbacks helped improve conversion rates by 12%, enabling Sales to engage customers more effectively at convenient times.

Shirshendu Bhattacharya,
Deputy VP, Digital Sales Transformation, Angel One

3. Post-Call Feedback

Useful in theory but mixed in practice due to low engagement and notification fatigue.

"We were able to gather valuable inputs when delivery attempts fail, helping us deliver shipments and reduce returns."

Abhay Warrier,
Head, Customer Service Strategy, Ajio

Source: Truecaller Customer Interviews

4.
Analytics Dashboards

LEs already use CRM-integrated dashboards; SMEs want analytics but only if seamlessly integrated.

> **"We track both channel-level performance and overall CX outcomes. If a channel isn't driving engagement or efficiency, it gets deprioritised."**
>
> *Yeshwanth Reddy,*
> *SVP Product, Incred*

5.
Personalised Call Content

CRM Integration

Seen as high-value for tailored journeys, but many LEs already achieve this through existing CRM setups.

> **"Clear brand identity and contextual cues ensure customers engage with calls that are relevant to them."**
>
> *Rama R.,*
> *Customer Success, CureSkin*

6.
Priority Call Indicator

Low usage today but high future potential for urgent calls and fraud alerts.

> **"Delivery calls are clearly labelled, establishing trust and improving order fulfillment rates."**
>
> *Ishan Agnihotri,*
> *Strategy & Program, Meesho*

Source: Truecaller Customer Interveiws

Section 7

Strategic Recommendations

The research shows a widening gap between what customers expect from business calls and how businesses design and measure them. The future of voice depends on closing this gap. When outreach is designed around customer expectations, voice transforms from a routine touchpoint into a trust-led, relationship driver.

01

What Customers Expect

- Clear caller identity and purpose
- Confidence that the call is legitimate
- Outreach at a convenient time
- Relevant, personalised conversations

02

What Businesses Must Do

- Make caller identity visible and consistent
- Provide context for every call
- Align calls with customer availability and consent
- Measure call outcomes, not just volume

Designing Voice for Trust and Growth

Closing the gap requires structural change, not incremental tweaks. These recommendations outline how to fix the fundamentals to make voice trusted, relevant, and measurable.

1. Branded Calling as the Default Protocol

Rebuild trust & improve call pick-up rates

Strategic Action:

Shift from anonymous outbound dialing to a verified, branded calling experience. Use Verified Caller ID so the brand name, logo, and verification badge appear on the customer's screen.

Expected Outcomes:

- Higher call answer rates
- Improved brand perception
- Increased customer trust at first touch

2. Adding Context Before Connection

Increase call relevance & preparedness

Strategic Action:

Communicate the call purpose upfront on the call-screen so customers know why they're being contacted. Mention specific triggers like order updates, delivery coordination, etc.

Expected Outcomes:

- Higher call answer rates
- Reduced confusion and suspicion around unknown calls
- More productive conversations due to informed customers
- Faster issue resolution and improved engagement

3. Enabling Two-way Communication

Give customers control and convenience

Strategic Action:

Allow customers to reschedule missed calls on their own terms. Offer a "Call Me Back" option that lets them choose a convenient time for the conversation.

Expected Outcomes:

- Reduced customer frustration from repeated calls
- Higher engagement at the chosen callback time
- Stronger perception of a respectful, customer-first brand

4. Prioritising Voice for High-Impact Moments

Maximise trust and resolution

Strategic Action:

Prioritize voice interactions for emotionally sensitive, high-value, or complex situations like escalations, payment failures, and complex onboarding. Ensure agents can access the full customer history, past tickets, and recent activity. Personalize solutions based on recent activity and customer profile.

Expected Outcomes:

- Reduced churn during critical moments
- Improved NPS and loyalty
- Higher retention

5. Moving from Transaction to Relationship

Strengthen post-purchase loyalty & long-term value

Strategic Action:

Turn voice in to a proactive relationship-building tool. Check-in after a purchase, follow up once an issue is resolved, and reach out early if a customer seems at risk of churning. Use voice to build trust over time.

Expected Outcomes:

- Increased customer lifetime value
- Stronger emotional connection to the brand
- Improved loyalty and advocacy

6. Using Compliance as a Competitive Edge

Turn regulation into a trust advantage

Strategic Action:

Build on India's robust consumer protection framework i.e. DND registries, DLT compliance, and consent-based outreach, as the foundation for trusted voice communication.

Limit excessive calling and be clear about why you're reaching out. Be mindful of customers' time and privacy.

Expected Outcomes:

- Reduced regulatory and reputational risk
- Higher trust in brand communications
- Sustainable long-term engagement rates

7. Measuring Voice Beyond Volume

Treat voice a growth lever, not a cost centre

Strategic Action:

Shift voice measurement beyond connection rates and cost per interaction. Track metrics such as customer retention, resolution quality, emotional reassurance, and revenue contribution from high-impact calls.

Expected Outcomes:

- Clear visibility into voice-driven business impact
- Stronger linkage between voice interactions and retention
- Improved investment decisions based on outcome data

8. Unified Identity Management

Solve CNAP confusion & fragmented brand identity

Strategic Action:

To complement CNAP's KYC-verified identity layer, businesses can reinforce customer recognition by ensuring their registered entity name and brand identity are consistent across all communication touchpoints and telecom networks.

Expected Outcomes:

- Higher call recognition and answer rates
- Consistent brand identity across telecom networks
- Reduced likelihood of spam labeling

9. Intent-Based Calling Architecture

Improve compliance & calling efficiency

Strategic Action:

Separate outbound infrastructure. Use the 160 series for service/transactional needs and the 140 series for promotion. To avoid "Number Series Stigma," use Pre-Call Contextualization to explain why you are calling.

Expected Outcomes:

- Lower compliance and regulatory risk
- Improved call answer rates due to clearer intent
- Better operational control over outbound campaigns

10. Integrating Voice with Digital Channels

Connect customer data across touchpoints

Strategic Action:

Link voice interactions to CRM, chat, and email systems so agents have full customer context and can route seamlessly between channels based on customer needs.

Expected Outcomes:

- Voice becomes part of unified customer intelligence
- Better context for every conversation
- Seamless omnichannel experience

11. Hyper-Localization & Personalization

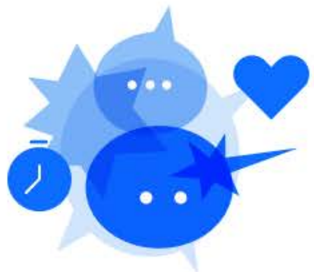
Increase answer rates through relevance

Strategic Action:

Use regional languages when contacting customers in non-metro or regional markets. Pair this with personalized call reasons so that customers immediately understand the relevance of the call.

Expected Outcomes:

- Higher answer rates in regional markets
- Stronger customer trust and familiarity
- More relevant and effective voice interactions



Voice sits at the intersection of trust, timing, and resolution. When designed deliberately, it moves from an operational channel to a high-intent, growth lever. Despite the growth of digital channels, businesses and customers continue to turn to voice when trust, urgency, and complexity matter most. The data shows rising adoption, strong customer preference in high-stakes moments, and clear impact on satisfaction and retention.

But the effectiveness of voice now depends on design.

Anonymous outreach, poor timing, and volume-based measurement erode the very strengths that make voice powerful. Identity must be visible. Context must be clear. Timing must be intentional. Measurement must reflect relationship outcomes, not just operational efficiency.

The future of voice will not belong to those who make the most calls. It will belong to those who make the right calls — at the right time, with the right context, and with measurable impact.

About the Research Partners

This report was commissioned by Truecaller for Business and Tata Tele Business Services, with independent research conducted by Kantar to examine the evolving role of voice in customer engagement.

Truecaller for Business

Business Calling Platform Partner

Truecaller for Business is a comprehensive, communication, and intelligence platform built for impact. It solves operational gaps, improves communication efficiency, enhances customer experience, reduces risk, and builds customer trust. Trusted by over 2,300+ businesses worldwide, Truecaller for Business empowers businesses to drive growth and retention across the entire customer journey.
Learn more **here**.

Tata Tele Business Services

Enterprise Communications Partner

Tata Tele Business Services is one of India's leading enterprise connectivity and communication solution providers. Part of the prestigious Tata Group of Companies, the company offers a wide range of services, including connectivity, collaboration, cloud, security, and marketing solutions offering the largest portfolio of ICT services for businesses in India. With deep enterprise expertise, TTBS enables businesses across industries to modernize their communication infrastructure and deliver better customer experiences. Learn more **here**.

Kantar

Research Partner

Kantar is the world's leading marketing data and analytics business, and delivers the intelligence needed to power brand growth. Kantar empowers brands to make effective marketing decisions based on predictive evidence, helping them craft powerful growth strategies rooted in the connection between consumers, brands and enterprise value. This is powered by Kantar's uniquely robust human and synthetic data, their unrivalled IP, their AI-native platform and the team of global brand experts. Learn more **here.**

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