THIRD EDITION

STATE *of the* CONNECTED CUSTOMER

Insights from over 8,000 consumers
and business buyers worldwide

salesforce research

About This Report

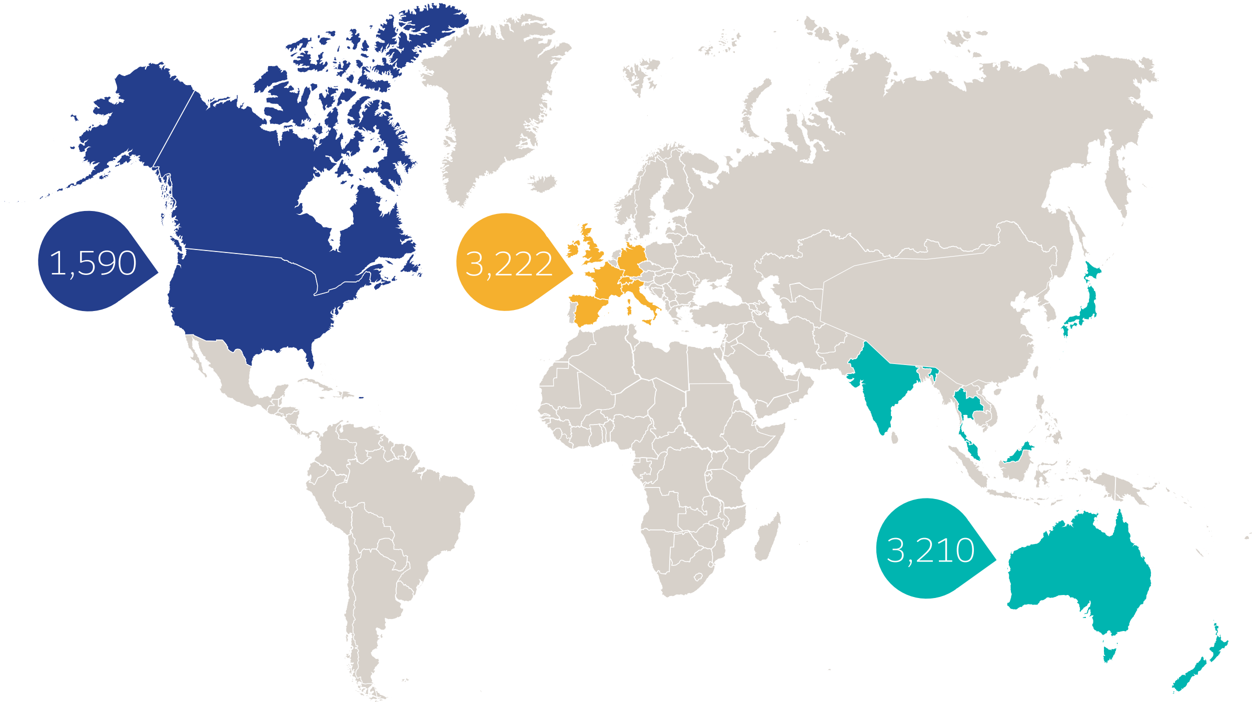
For this third edition of the "State of the Connected Customer" report, Salesforce Research surveyed over 8,000 consumers and business buyers worldwide to discover:

- How customer expectations continue to shift
- Which emerging technologies are transforming standards for engagement
- The role of trust in customer relationships
- The rising importance of corporate values in buying decisions

Data in this report is from a double-blind survey conducted April 2–18, 2019, that generated responses from 8,022 individuals in Australia/ New Zealand, Canada, France, Germany, Hong Kong, India, Italy, Japan, Singapore, Spain, Switzerland, Thailand, the United Kingdom/ Ireland, and the United States.

All respondents are third-party panelists (not limited to Salesforce customers). See page 61 for detailed respondent demographics.

Percentages may not total 100 due to rounding. All comparison calculations are made from total numbers (not rounded numbers).



Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.

About This Report

We examine survey results from three primary groups:

Consumers
Those reporting on their interactions with companies when purchasing for themselves

Business Buyers
Those reporting on their interactions with companies when purchasing on behalf of their employers

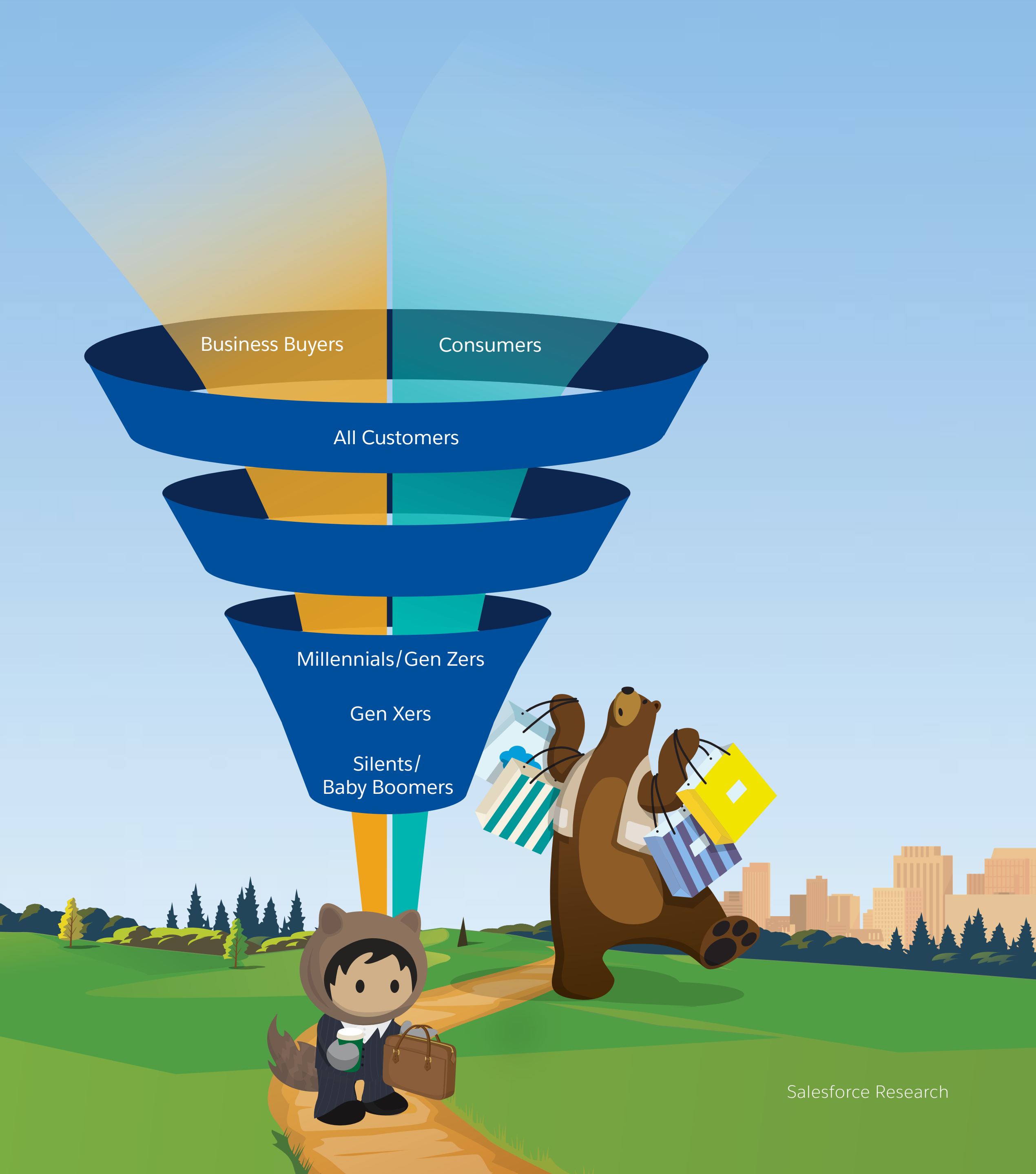
Customers
Aggregated consumers and business buyers

We also examine survey results across three generations of customers: Respondents were required to be 18 years of age or older.

Millennials/Gen Zers
Born between 1981–2000

Gen Xers
Born between 1965–1980

Silents/Baby Boomers
Born before 1965



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Executive Summary

Companies are being challenged to rethink not just the individual experiences they provide customers, but their entire approach to customer engagement.

Twenty-five years since the popularization of the internet and 12 years after the introduction of the iPhone, customer expectations keep soaring. Companies are in a race to transform themselves to foster the digitally savvy relationships that consumers and business buyers alike demand.

At the same time, trust has become only more relevant. Collective concern over an array of societal issues has prompted customers to examine what companies stand for.

01

Extraordinary Experiences Raise the Bar for Customer Engagement

(see page 8)

Customers' standards for modern engagement are a far cry from the transactional, one-size-fits-all experiences that were once de facto. Tailored, contextualized engagement across multiple touchpoints is the benchmark, and disruptive business models are further raising the bar. **Seventy-three percent of customers say one extraordinary experience raises their expectations of other companies.**

02

New Expectations Shift the Digital Transformation Playbook

(see page 14)

Innovation is accelerating across industries thanks to emerging technologies like artificial intelligence (AI) and the Internet of Things (IoT). With many consumers and business buyers willing to pay a premium for differentiated, first-to-market products and services that enhance their experiences, the pressure is on for companies to get ahead of the digital curve. **Seventy-five percent of customers expect companies to use new technologies to create better experiences.**

03

Trust Becomes More Important, Yet More Elusive

(see page 19)

Trust has always been foundational in customer relationships, but it's a more nuanced subject in an era where customers expect transparency, authenticity, and ethics. A lot goes into fostering customer trust, and it's an increasingly formidable challenge. **Fifty-four percent of customers say it's harder than ever for companies to earn their trust.**

04

Corporate Values Sway Buying Decisions

(see page 22)

The days when businesses were expected to sit on the sidelines of societal issues are over. Today, customers expect companies to not only operate ethically and with their communities' interests at heart, but in a way that advances causes such as equal rights, philanthropy, and sustainability. **Seventy-three percent of customers say a company's ethics matter more than they did a year ago.**

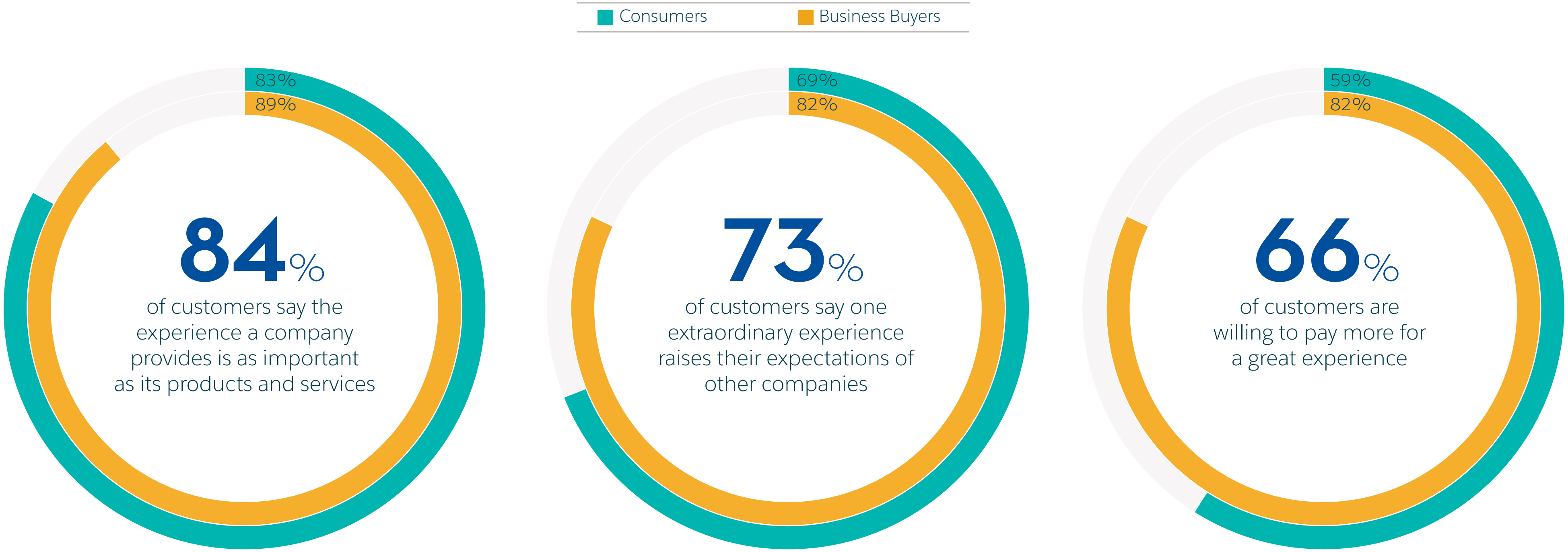
Introduction

Customer experience is not a new concept, but it has never been more relevant. Case in point: Salespeople – once solely focused on closing transactions – now track customer satisfaction more than any other metric.[*] Nearly half of marketers – once concerned only with driving new leads – now champion customer experience initiatives across their entire companies.[**] Even leaders in information technology (IT) – once thought of as the ultimate back-office function – now cite customer experience as their top priority.[†]

These shifts in business focus are for good reason. Great experiences reap great rewards, with almost two-thirds of customers willing to pay a premium for them. What's more, a standout experience with one company prompts nearly three-quarters of customers to hold other companies to higher standards.

84% of customers say the experience a company provides is as important as its products and services – **up from 80% in 2018**.

The Customer Experience Stakes Have Never Been Higher



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[*] "State of Sales," Salesforce Research, May 2018.

[**] "State of Marketing," Salesforce Research, December 2018.

[†] "Enterprise Technology Trends," Salesforce Research, May 2019.

Introduction

A lot of factors – ranging from new technologies and products to new business models and increased awareness of corporate ethics – make customer expectations a moving target. Thus, delivering the great experiences that meet those changing expectations is a difficult endeavor.

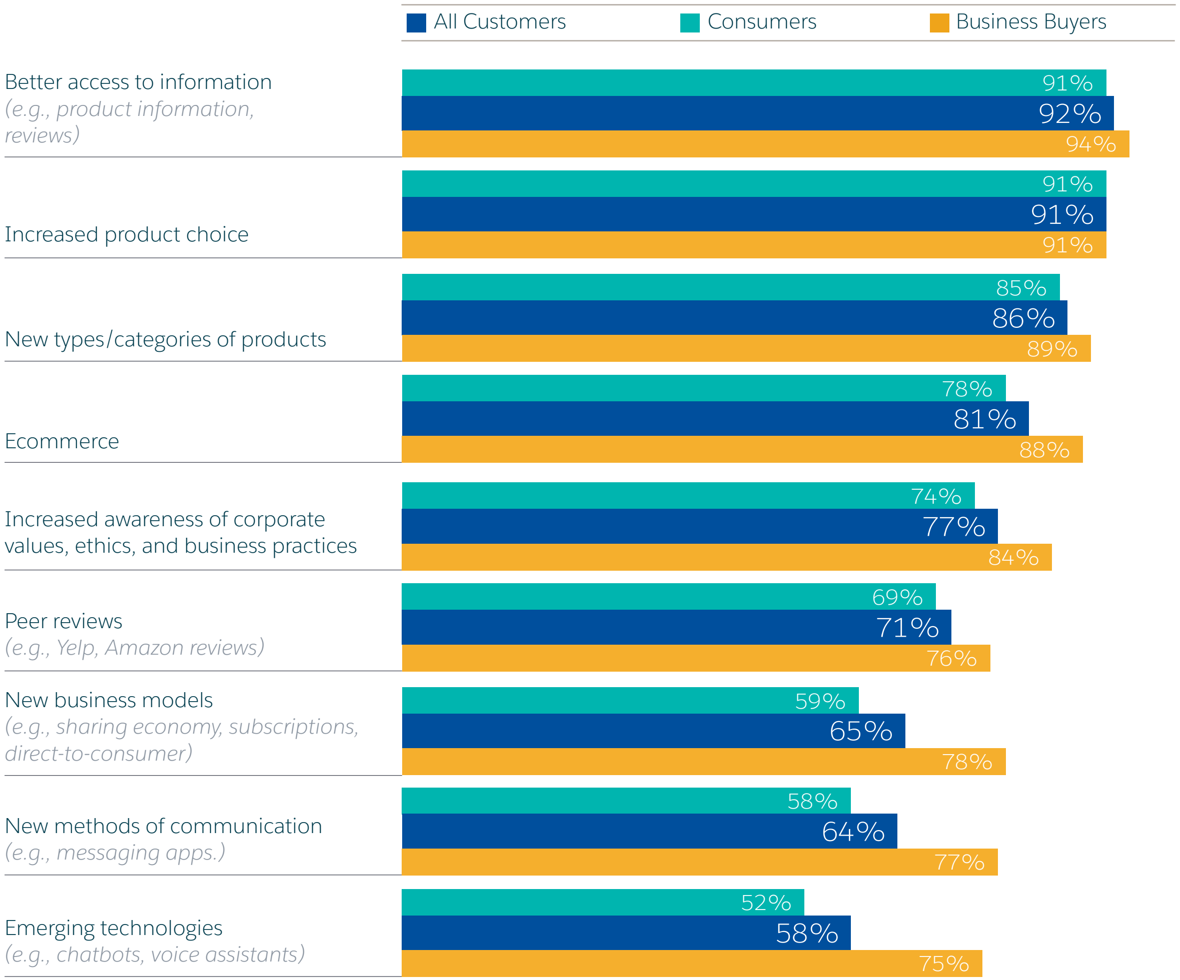
Companies are being challenged to rethink how they engage with increasingly connected, empowered, and discerning customers.

54% of customers say companies need to transform how they engage with them.

Each customer is unique, and each company will use different tactics to delight them. Yet a focus on several key principles – including treating customers like the individuals they are, connecting interactions and touchpoints across their journeys, investing in digital transformation, and leading with trust and values – can help companies shape their strategy of how to best engage their customers. Ultimately, these principles can help companies develop valuable one-to-one customer relationships.

Innovation, Connectivity, Trust, and Values Raise the Bar for Customer Engagement

Customers Who Say These Factors Change Their Expectations of Companies



See page 46 for additional data segmentations.

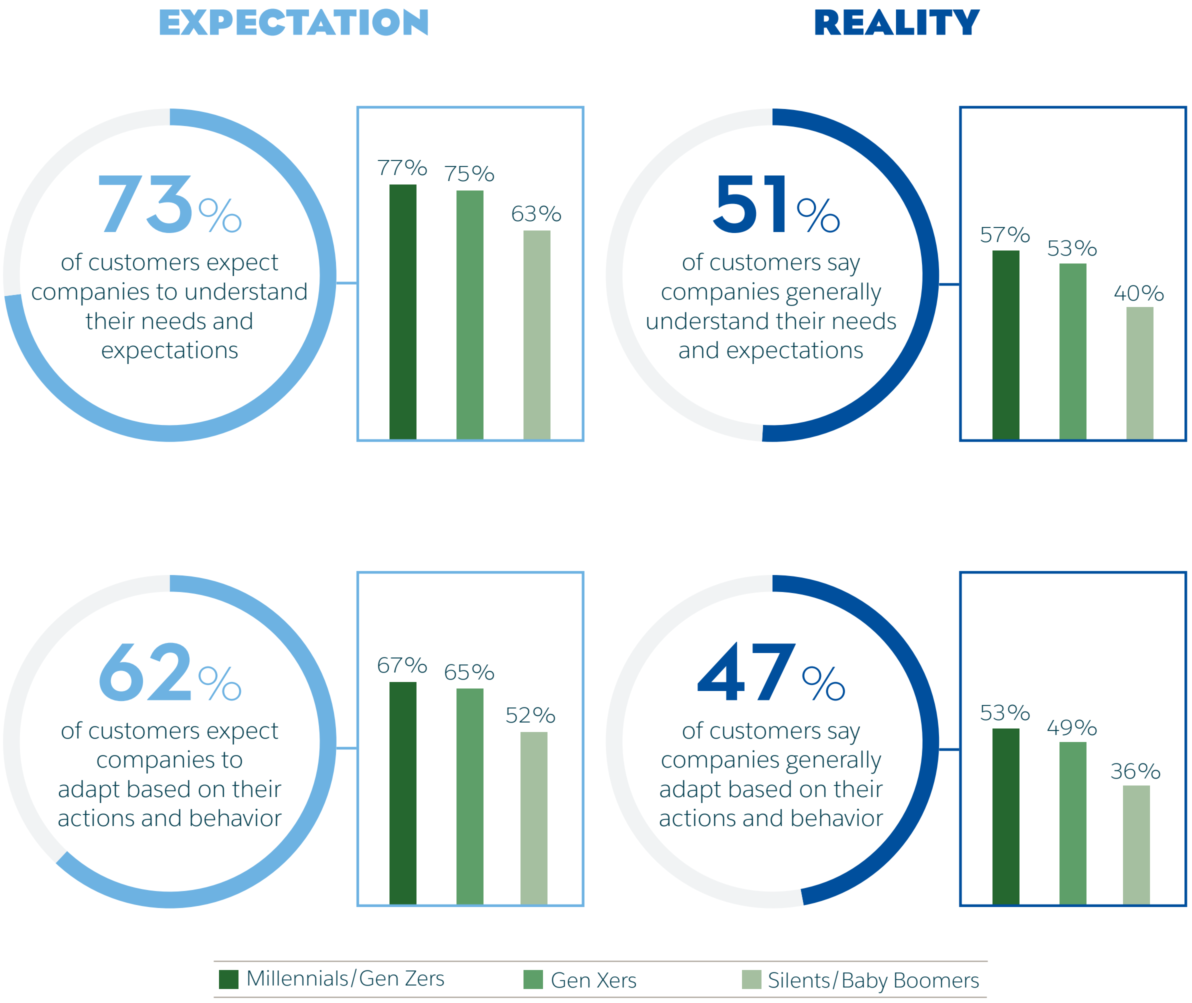
01 Extraordinary Experiences Raise the Bar for Customer Engagement

The first step to understanding today's connected customers is to cast aside any generalizations about their interests. Customers expect to be treated as people rather than personas. Like with friendships, customer relationships bloom when individuals feel understood. But when customers feel like their needs aren't appreciated, even after multiple interactions, relationships can weaken.

Expectations for personalized engagement span generations, rebutting outdated strategies aimed at broad segmentations and challenging companies to learn more about individuals. Yet companies haven't caught up, with relatively few understanding customers' needs and expectations – let alone adapting to their actions and behavior.

52% of customers – including 56% of consumers – say companies are generally impersonal.

Companies Aren't Living Up to Customers' Personalization Expectations



EXPECTATION

73% of customers expect companies to understand their needs and expectations

62% of customers expect companies to adapt based on their actions and behavior

REALITY

51% of customers say companies generally understand their needs and expectations

47% of customers say companies generally adapt based on their actions and behavior

01 Extraordinary Experiences Raise the Bar for Customer Engagement

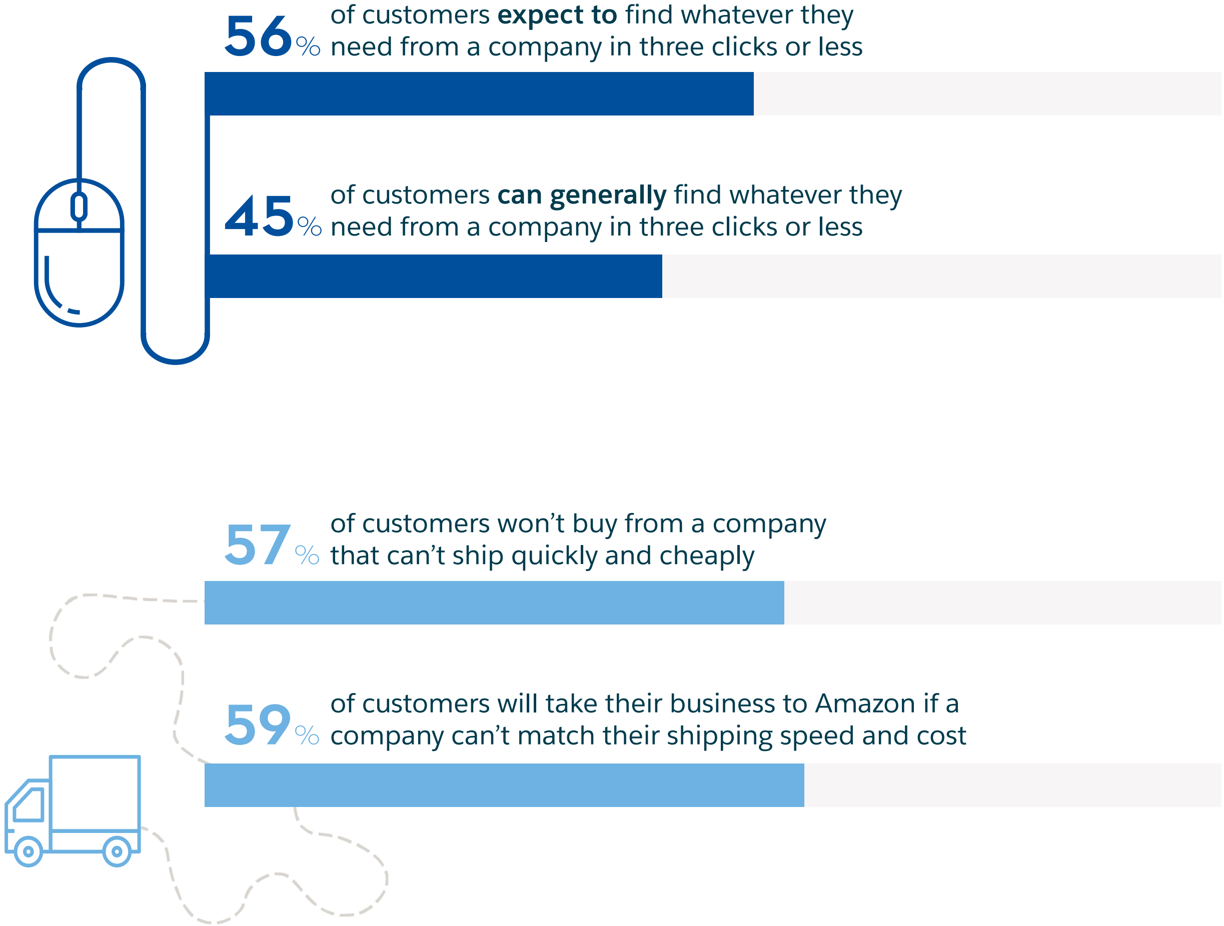
If a friend ignores a call, text, or email, it probably doesn't bode well for the overall relationship. The same dynamic is true for today's customers, who live in an always-on world where an answer is just a tap away.

71% of customers expect companies to communicate with them in real time.

Expectations for timeliness start when customers are just browsing, with more than half expecting to find whatever they need – be it pricing, inventory, or something else – in three clicks or less. It extends to when they make a purchase, with nearly six in 10 willing to switch to a competitor with quicker and cheaper shipping. It persists when they have questions for customer service: **78% of customers expect to solve complex issues by speaking to one person.**

Most customers won't wait for someone to give them information they can find themselves. **Sixty-eight percent would rather use self-service channels – like knowledge bases or customer portals – for simple questions or issues.**

Modern Customer Engagement Happens in Real Time



56% of customers **expect to** find whatever they need from a company in three clicks or less

45% of customers **can generally** find whatever they need from a company in three clicks or less

57% of customers won't buy from a company that can't ship quickly and cheaply

59% of customers will take their business to Amazon if a company can't match their shipping speed and cost

See pages 47 and 48 for additional data segmentations.

01 Extraordinary Experiences Raise the Bar for Customer Engagement

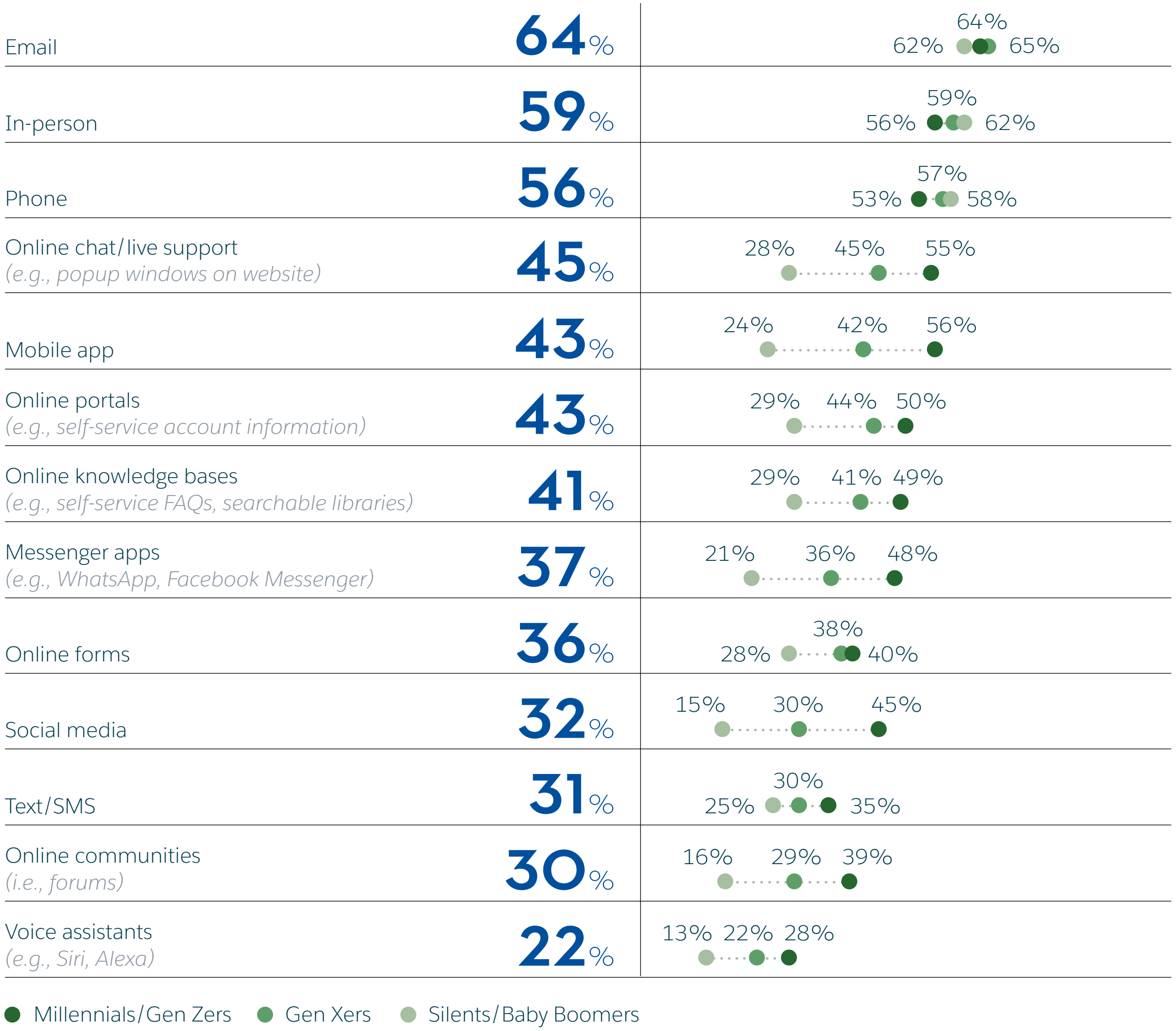
Companies aren't just expected to be available anytime – they're also expected to be available anywhere. Multichannel behavior is a fact of everyday life . **Forty percent of customers won't do business with a company if they can't use their preferred channels.**

Millennials and Gen Zers are the most omnichannel generations by far – citing, on average, 51% more channels as "preferred" than the silent and baby boomer generations. Younger customers are, unsurprisingly, more digitally savvy when engaging with companies. More than half (56%) of millennial and Gen Z customers prefer mobile apps, and are more than twice as likely than silents/baby boomers to prefer voice assistants like Siri and Alexa. Email is favored across generations.

55% of customers – including 68% of millennials/Gen Zers – prefer digital channels over traditional ones.

Preferred Channels Span Online and Offline Worlds

Customers Who Prefer the Following Channels When Communicating with Companies



See page 49 for additional data segmentations.

01 Extraordinary Experiences Raise the Bar for Customer Engagement

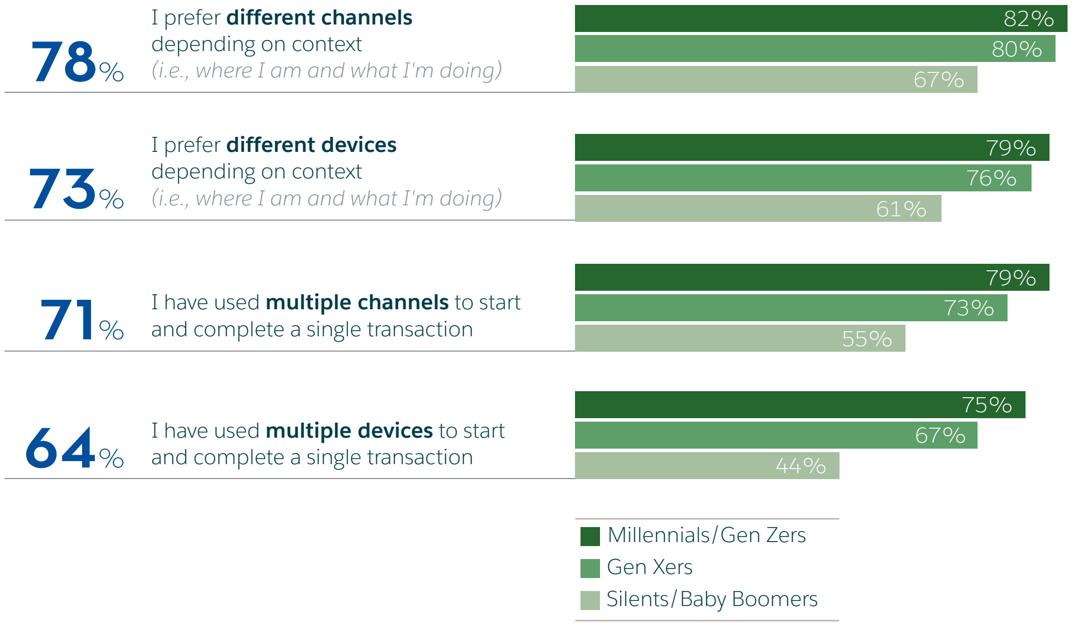
Customers prefer a variety of channels, at least in part, because of context. It may be most convenient to use a mobile app while riding transit, for example, or to send a detailed email to customer service when there's a complex issue at hand. But as lives get busier and attention spans shorter, cross-channel engagement isn't as cut and dry as it once was.

Today's customer journeys are complex, nonlinear, and fragmented across touchpoints. The majority of consumers and business buyers across generations have used multiple channels to start and complete single transactions – such as when they first see an ad on social media only to make a purchase on a website later. What's more, **nearly two-thirds (64%) of customers have used multiple devices to start and complete transactions** – such as browsing on a smartphone only to sign up for an account on a desktop later.

This multichannel, multi-device reality poses a vexing question: How can companies foster great customer engagement across nonlinear journeys? In other words, how can they keep experiences connected?

Context Matters for Connected Customer Engagement

Customers Who Say the Following



See page 49 for additional data segmentations.

01 Extraordinary Experiences Raise the Bar for Customer Engagement

Effective customer engagement isn't just personalized, timely, and omni-channel. It's also connected, meaning that customers' preferences are known across touchpoints, and any required information can be quickly accessed.

69% of customers expect connected experiences.

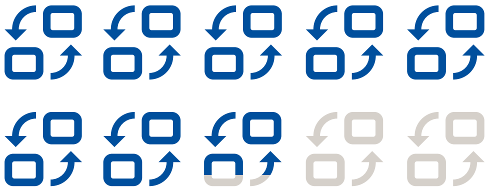
Omni-channel and omni-device behavior makes connected experiences challenging enough, but customers also expect the representatives they encounter across those touchpoints to have the same information. In customers' minds, for example, a service agent should know about a recently signed sales contract, or the details of a recent ecommerce transaction, and engage accordingly. **Sixty-four percent of customers expect tailored engagement based on past interactions.**

For many companies, this is easier said than done. The average enterprise uses 900 different applications, 29% of which are integrated.* Customers feel the effects, with nearly three-fifths reporting experiences that generally reflect separate departments rather than unified companies.

Customers Expect Unity but Often Face Silos

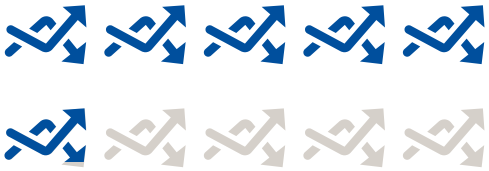
78%

of customers expect consistent interactions across departments



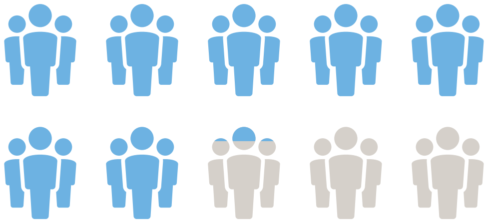
59%

of customers say it generally feels like they're communicating with separate departments, not one company



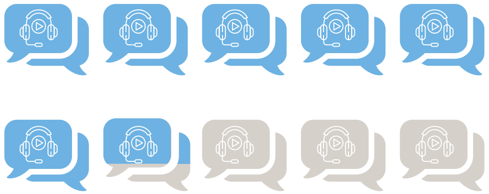
72%

of customers expect all company representatives to have the same information about them



66%

of customers say they often have to repeat or re-explain information to different representatives



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* "MuleSoft Connectivity Benchmark Report," February 2019.
See pages 47 and 48 for additional data segmentations.

SPOTLIGHT

Direct to Consumer

Sixty-five percent of customers say new business models are changing their expectations of companies. Direct-to-consumer sales is a prime example.

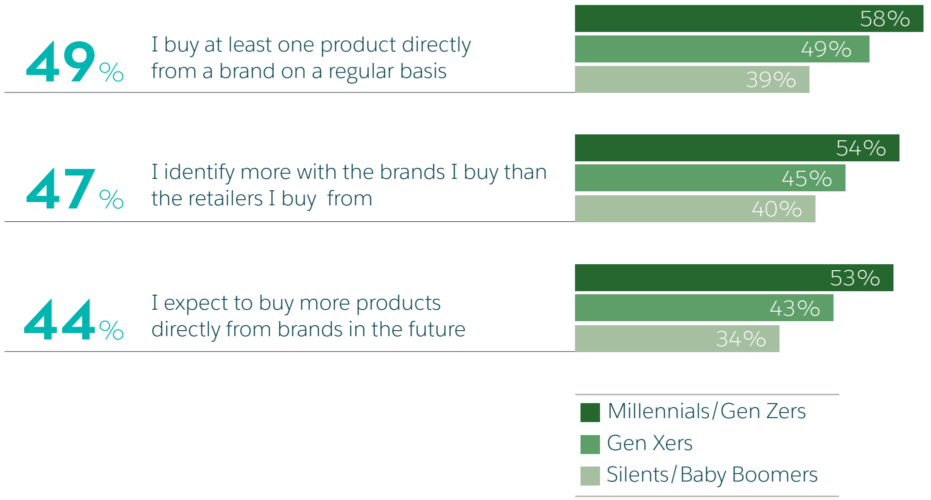
Pioneers such as Warby Parker and Dollar Shave Club disrupted entire industries by cutting out intermediaries and offering products directly to end users. Established branded manufacturers such as adidas are embracing the direct-to-consumer model, with 99% of them investing in such initiatives.* The impact has been huge not only for revenue streams and retail relationships, but for customer expectations. **Seventy-three percent of consumers expect to be able to buy directly from a brand as well as from a retailer.**

76% of consumers expect the same level of engagement when buying from a brand as when buying from a retailer.

Today, nearly half of consumers buy at least one product directly from a brand on a regular basis. Much like digital channels, millennial and Gen Z consumers are particularly fond of this new way to shop.

Direct-to-Consumer Models Are a Hit with Younger Generations

Consumers Who Say the Following



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* “Consumer Goods and the Battle for B2B and B2C Relationships,” Salesforce, May 2019.

02 New Expectations Shift the Digital Transformation Playbook

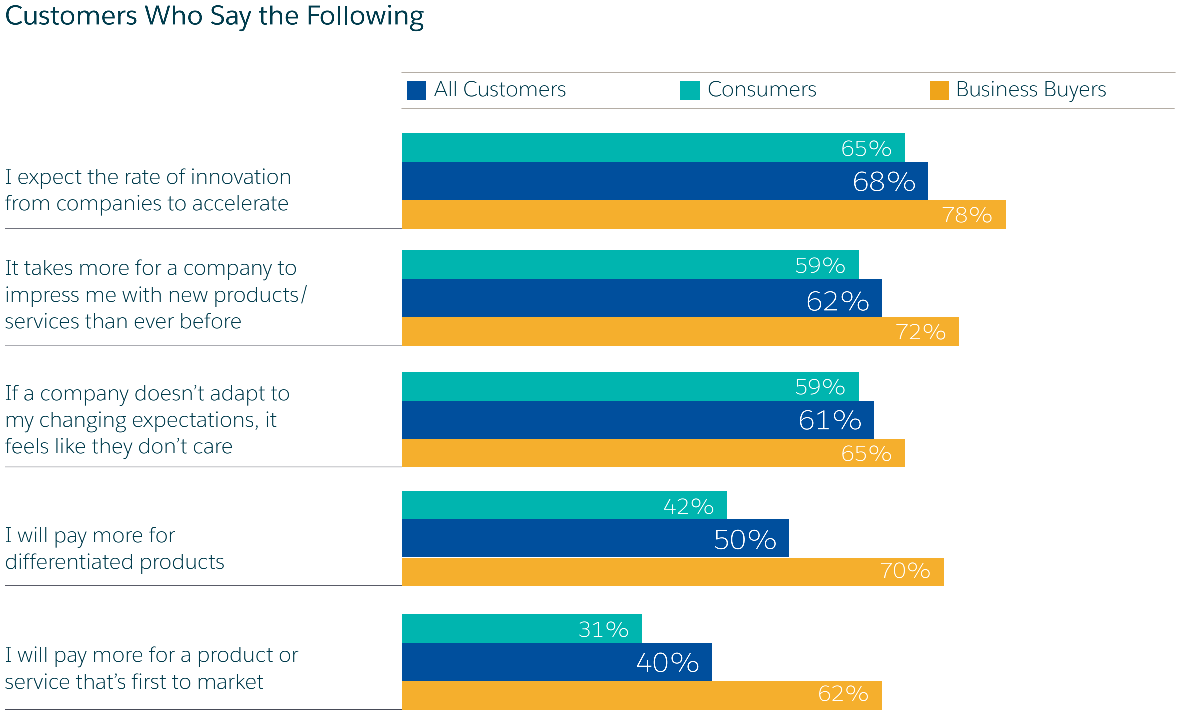
Direct-to-consumer sales is an example of something more critical than ever as customer expectations soar: innovation – the adaptation to customer needs or technological change.

67% of customers expect companies to provide new products and services more frequently than before – **up from 63% in 2018**.

Innovation can come through new products or new ways of engaging customers. Whatever the form factor, the bar for innovation is higher than ever, with the majority of customers saying companies must do more in order to impress them – let alone capture their attention. A lack of innovation, in fact, now signals a company's apathy toward its customers.

Innovation is particularly critical for business buyers, whose purchasing decisions can impact their own competitiveness. Seventy percent of business buyers will pay more for differentiated products, and nearly as many (62%) will pay more for products that are first to market.

Innovation Commands a Premium, Especially for Business Buyers



See pages 50 and 51 for additional data segmentations.

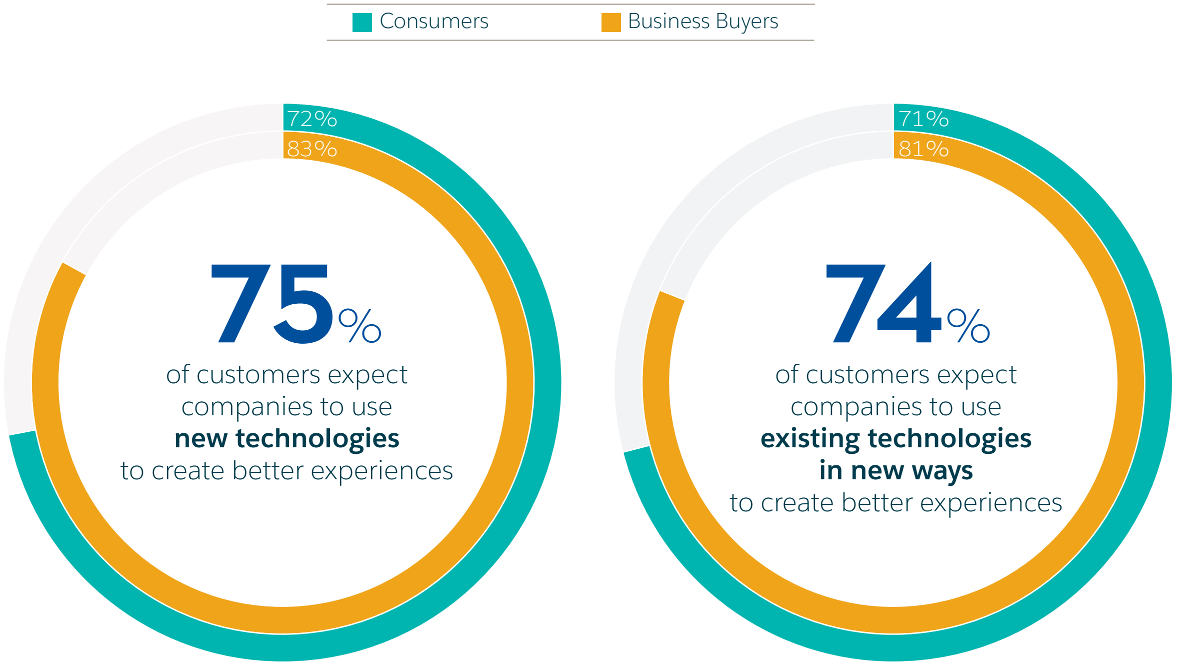
02 New Expectations Shift the Digital Transformation Playbook

There is a common thread across the factors redefining customer engagement and driving innovation: technology. As a result, digital transformation initiatives – which have historically entailed digitizing or modernizing back-end systems at a company – are now much more customer-facing. Acutely aware of what's possible, customers are pressuring companies to use technology to deliver better experiences.

67% of customers say the way a company uses technology indicates how it operates in general.

New use cases for existing technologies – like more engaging mobile apps or more tailored emails – go a long way. But a crop of newer technologies enabled by data proliferation are upping the ante even more. **Fifty-eight percent of customers say emerging technologies are changing their expectations of companies.**

Customer Expectations Are Driving Digital Transformation



75% of customers expect companies to use **new technologies** to create better experiences

74% of customers expect companies to use **existing technologies in new ways** to create better experiences

See pages 50 and 51 for additional data segmentations.

02 New Expectations Shift the Digital Transformation Playbook

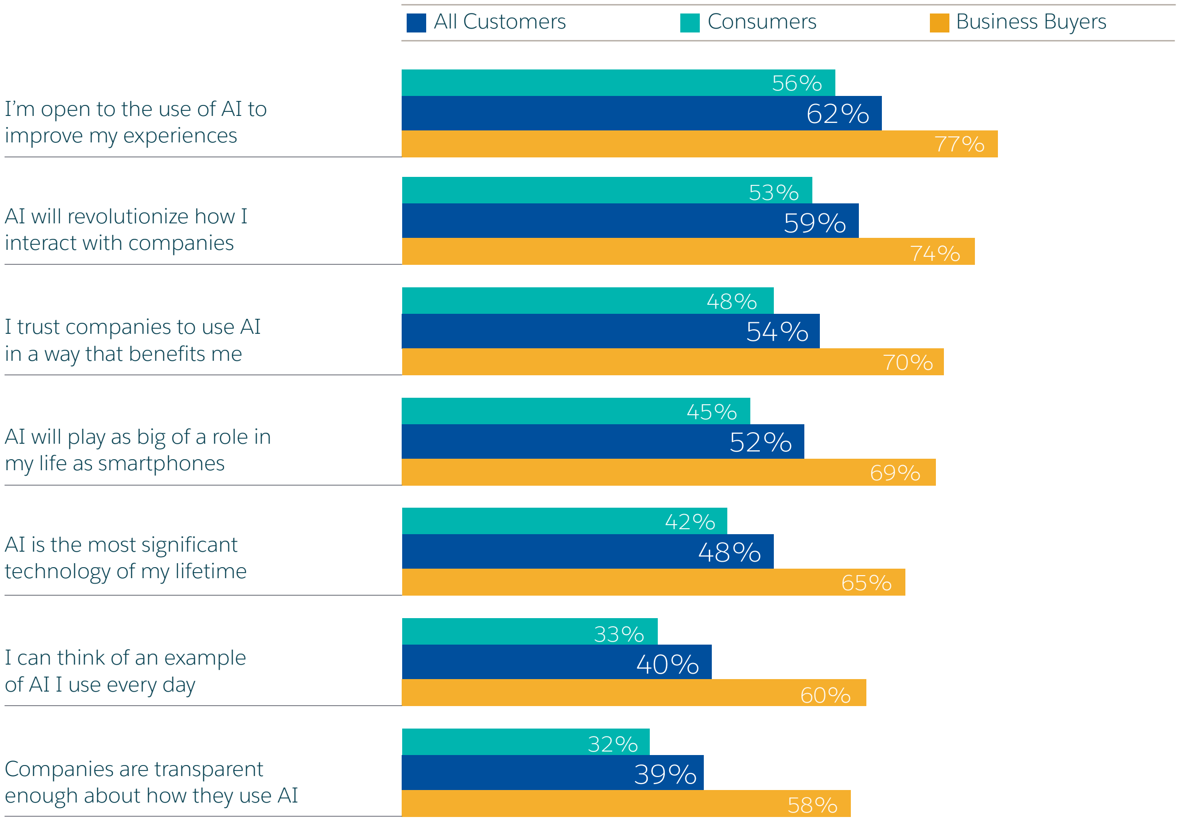
The backbone of today's emerging technologies, artificial intelligence (AI), is well appreciated among business buyers. Only one-third of consumers, on the other hand, can name an example of AI they encounter every day. But the fact is that someone is using AI whenever they do things as common as buying a recommended item on Amazon, using Waze to shorten their commute, or discovering a new favorite song on Spotify. Wittingly or not, data proliferation – paired with increasingly refined modeling capabilities – is making AI a mainstay of everyday life and fundamentally altering expectations.

62% of customers are open to the use of AI to improve their experiences – **up from 59% in 2018**.

However, companies have work to do in articulating AI's role, particularly to consumers. Fewer than half of consumers trust companies to use AI in a beneficial manner, and just shy of one-third think companies are transparent enough on the matter.

AI Has Gone Mainstream, but Reservations Remain

Customers Who Say the Following



See page 50 for additional data segmentations.

SPOTLIGHT

Voice Technologies

A prime – and increasingly common – example of AI in everyday life is voice technology. Already, 23% of customer service organizations are using AI chatbots, which are often in voice form, and an additional 31% plan to within 18 months.*

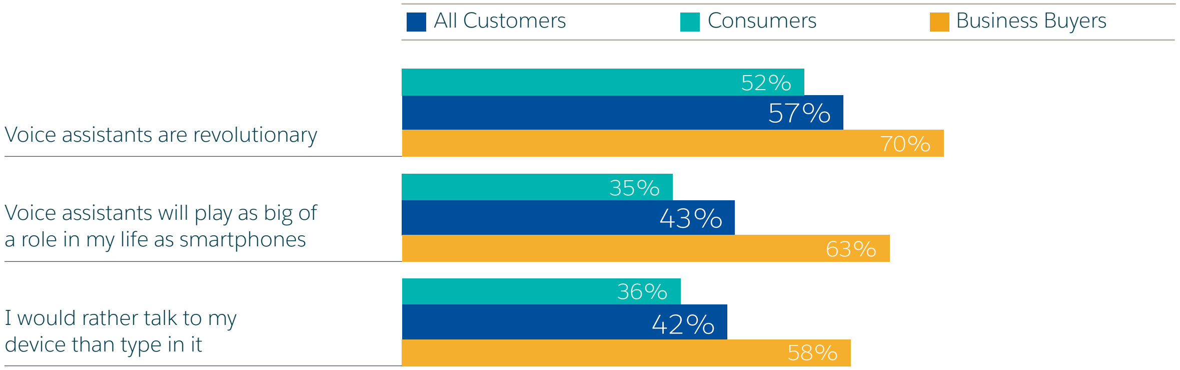
Certain instances of voice technology also come in the form of connected devices, such as Siri voice assistants on iPhones or smart speakers using Amazon's Alexa or Google Assistant. **Twenty-seven percent of customers use a voice assistant daily.** New form factors such as smart speakers that are always at the ready are becoming a mainstay of domestic life.

29% of consumers have a smart speaker in their home.

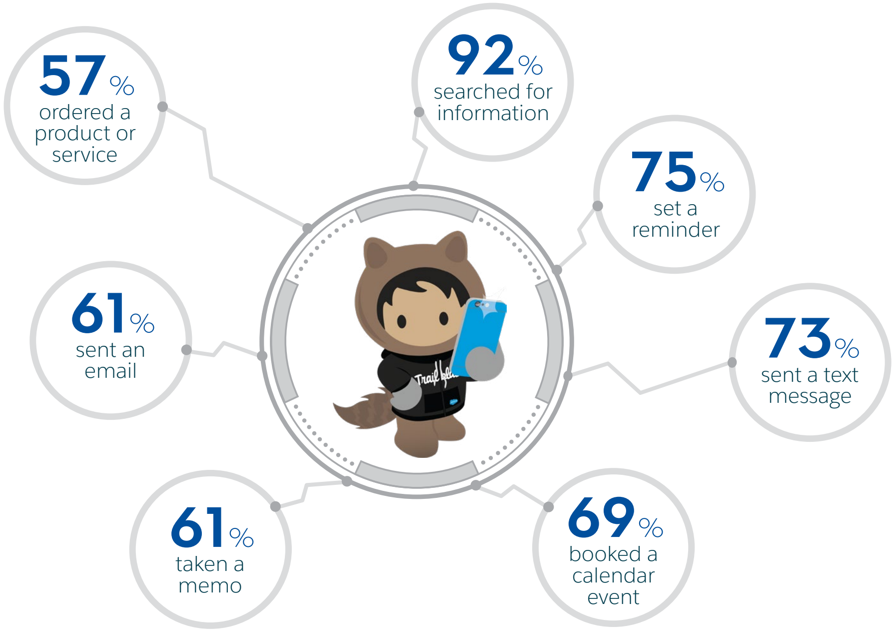
The impact of voice technology isn't limited to customer engagement. **Fifty-one percent of the workforce believes that voice assistants will transform how they work, and 38% report that they already use one during their workday.**

Voice Technology Makes a Splash, Particularly with Business Buyers

Customers Who Say the Following



Voice Assistant Users Who Have Done the Following



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* "State of Service," Salesforce Research, March 2019.
See page 50 for additional data segmentations.

02 New Expectations Shift the Digital Transformation Playbook

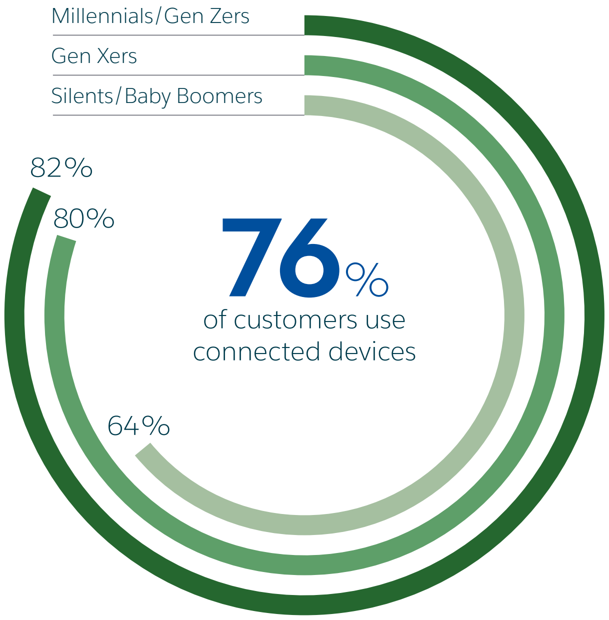
The next technology to normalize as part of everyday life may be increasingly ubiquitous connected devices – such as smart speakers, fitness trackers, smart thermostats, and countless other examples – that are collectively referred to as the Internet of Things (IoT). Today, more than three-quarters of customers have at least one connected device, and their influence on expectations is increasing.

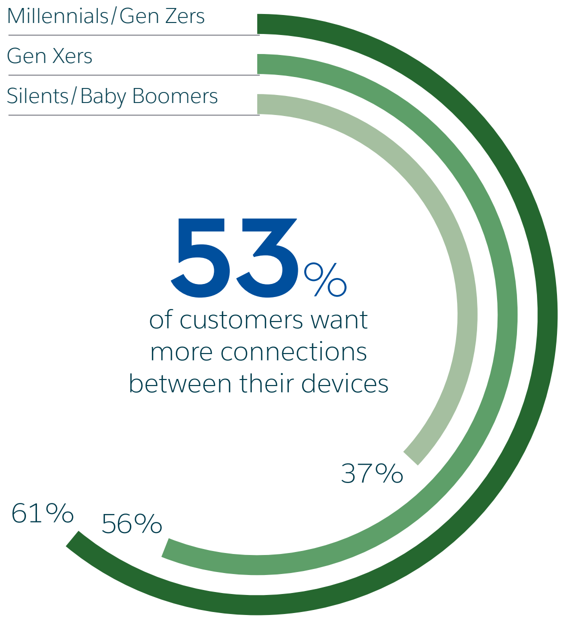
65% of customers say connected devices have transformed or are transforming their expectations of companies – **up from 60% in 2018**.

With use cases and impacts as diverse as their form factors, consumers and business buyers alike have come to rely on connected devices in a variety of ways. **Seventy-seven percent of users say connected devices make their lives easier.** Particularly among Gen Xers and millennials/Gen Zers, customers crave *more* connectivity between their devices.

See page 51 for additional data segmentations.

Connected Devices Power Customer Engagement





03 Trust Becomes More Important, Yet More Elusive

In last year's report, we explored a growing crisis of trust as questionable business practices and related scandals made headlines. Since then, the topic has become even more relevant.

73% of customers say trust in companies matters more than it did a year ago.

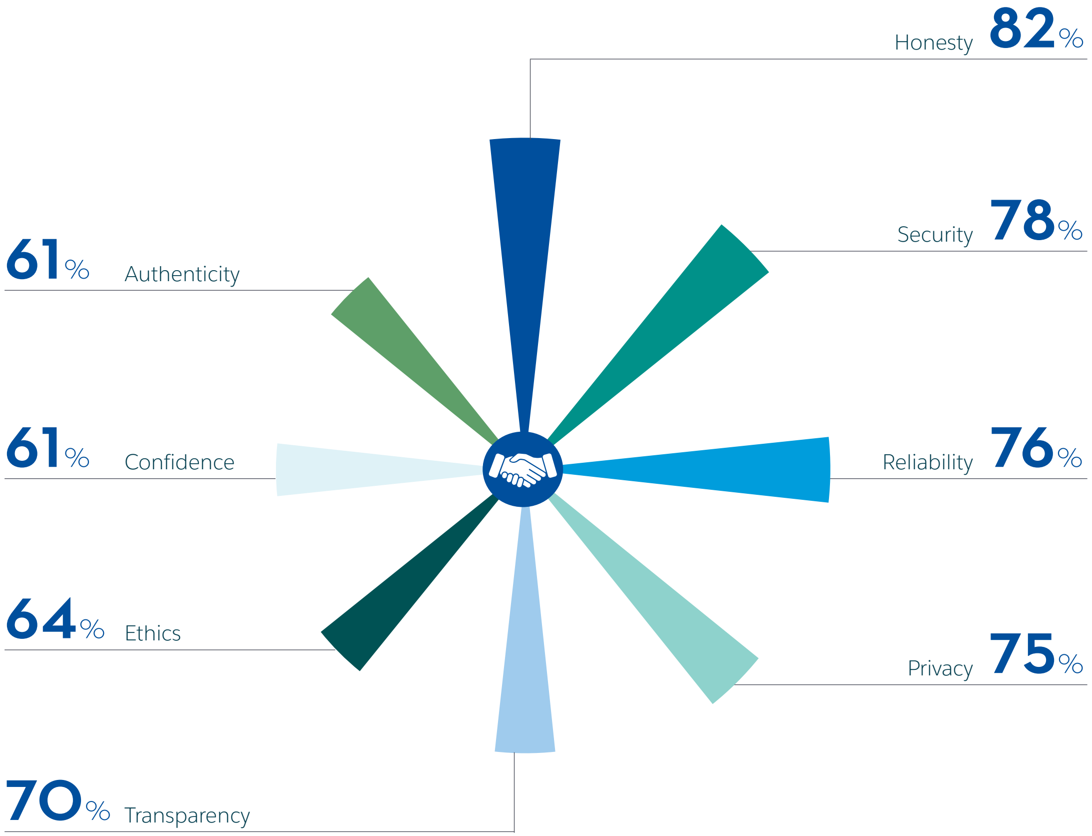
Now, customers are even more more selective than they once were in which brands they trust. **Fifty-four percent of customers say it's harder than ever for a company to earn their trust.**

A company's trustworthiness is inextricably tied to its bottom line. **Eighty-nine percent of customers are more loyal to companies they trust, and 65% have stopped buying from companies that did something they consider distrustful.**

Honesty is the best policy for earning customer trust. And while security and reliability serve as baseline indicators of trustworthiness, other factors such as transparency, ethics, and authenticity come in striking distance.

Earning Customer Trust Is a Multifaceted Pursuit

Customers Who Strongly Associate the Following with Trust



See pages 52 through 56 for additional data segmentations.

03 Trust Becomes More Important, Yet More Elusive

More devices, more channels, and more customer data have elevated customer engagement and created new ways for companies to differentiate. In some cases, however, they've introduced vulnerabilities and anxieties.

46% of customers feel they've lost control over their own data.

Distrust has become so prevalent that a significant number of customers now view companies as indifferent to the matter. Security has always been important, and customers treat it as a standard requirement for doing business. **Eighty-four percent of customers are more loyal to companies that have strong security controls.**

Lax Security Hurts Trust and Sales

41%

of customers don't believe companies care about the security of their data.

84%

of customers are more loyal to companies with strong security controls.

See pages 52 and 54 for additional data segmentations.

03 Trust Becomes More Important, Yet More Elusive

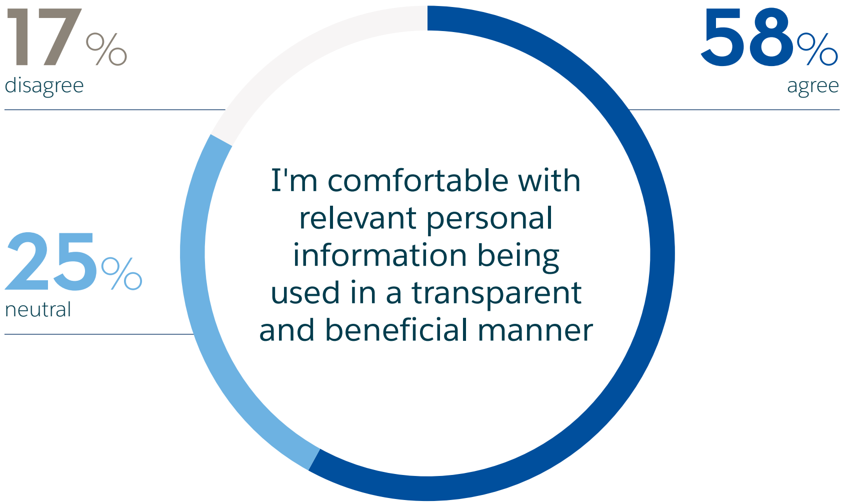
Security is just one part of the trust equation as data – and lots of it – increasingly fuels elevated experiences. Customers need to know that their data is not only safe, but being used legitimately.

When applied for their benefit, the majority of customers are comfortable with this data-value exchange. The problem is, with so many opaque or complex privacy policies, many customers are confused about how their data is used in the first place, let alone whether or not that use helps or harms them.

63% of customers say most companies aren't transparent about how their data is used.

Businesses that articulate how their data is – and isn't – used gain a selling point. **Seventy-eight percent of customers are more loyal to companies that are transparent about how their data is used.** That nearly half of customers have abandoned companies over privacy concerns – along with laws such as the European Union's General Data Protection Regulation (GDPR) – provides additional incentive for transparency.

Customers Seek Value in Exchange for Their Data



72% of customers **would stop** buying from a company/using a service due to privacy concerns.

63% of customers say most companies **aren't transparent** about how their data is used.

48% of customers **have stopped** buying from a company/using a service due to privacy concerns.

54% of customers say most companies don't use their data in a way that **benefits them**.

See pages 52 and 54 for additional data segmentations.

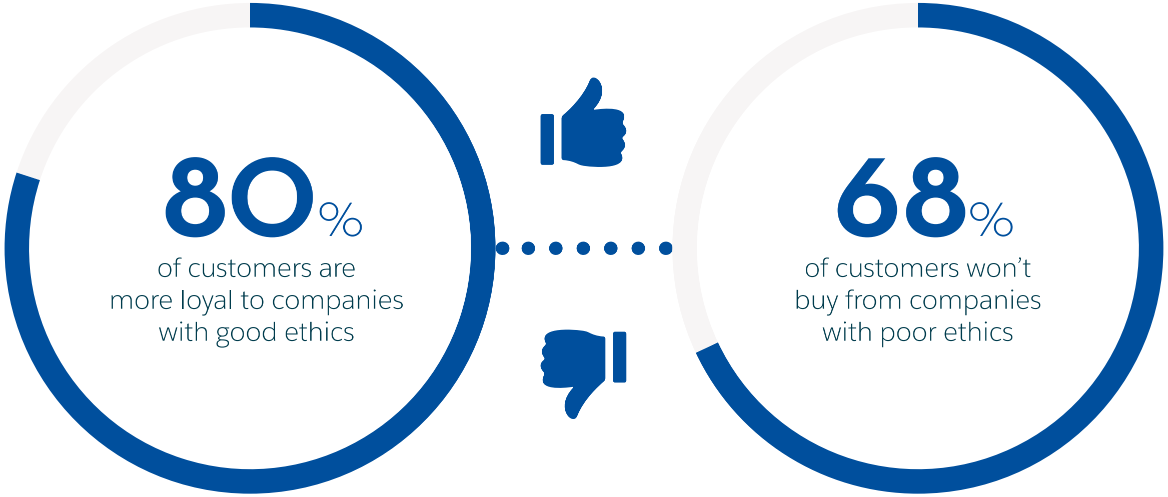
04 Corporate Values Sway Buying Decisions

A company's ethics are becoming more important as customers gain awareness of business practices, and privacy policies are just the tip of the iceberg. Increasingly, the principles that a company stands for factor into decisions of whether or not to buy from a company.

73% of customers say a company's ethics matter more than they did a year ago.

Over two-thirds of customers refuse to buy from companies with poor ethics. In the Fourth Industrial Revolution, technology and ethics are intertwined, as customers recognize that how emerging technologies like AI are used – rather than the technologies themselves – will influence the trajectory of society.

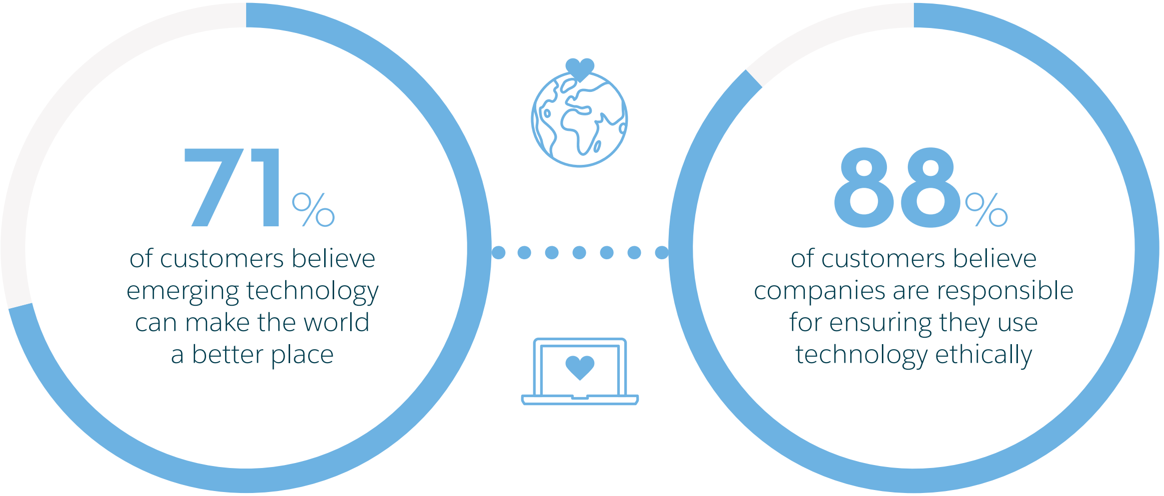
Values Can Make or Break Customer Relationships



80% of customers are more loyal to companies with good ethics

68% of customers won't buy from companies with poor ethics

It's Up to Companies to Use Technology for Good



71% of customers believe emerging technology can make the world a better place

88% of customers believe companies are responsible for ensuring they use technology ethically

See pages 57 and 58 for additional data segmentations.

04 Corporate Values Sway Buying Decisions

A key aspect of the ethics of technology is the distribution of its benefits among all people. Like with the industrial and digital revolutions that preceded it, the Fourth Industrial Revolution provides more opportunity, but also shifts in-demand skills. More than half of customers are concerned about equal opportunity as technology advances.

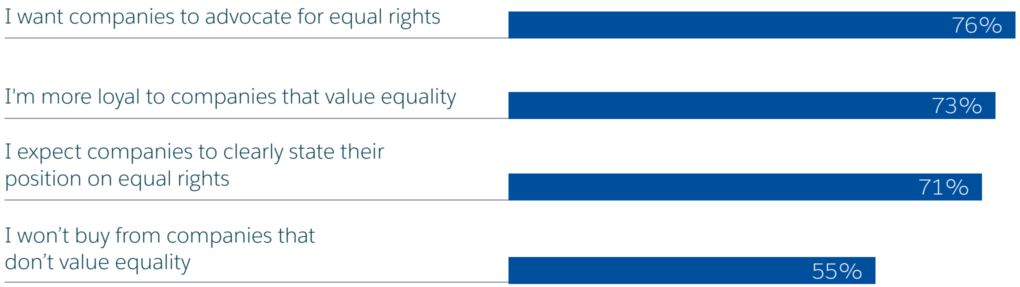
Over three-quarters of customers think companies are responsible for ensuring that everyone has a fair shot at technology-driven opportunities. A separate study found an overwhelming share of people want companies to prepare their existing and future workforces for new careers as technology evolves.*

Views on equal access to technology-driven opportunities are an example of a broader trend: the rising importance of a company's stance on equal rights.

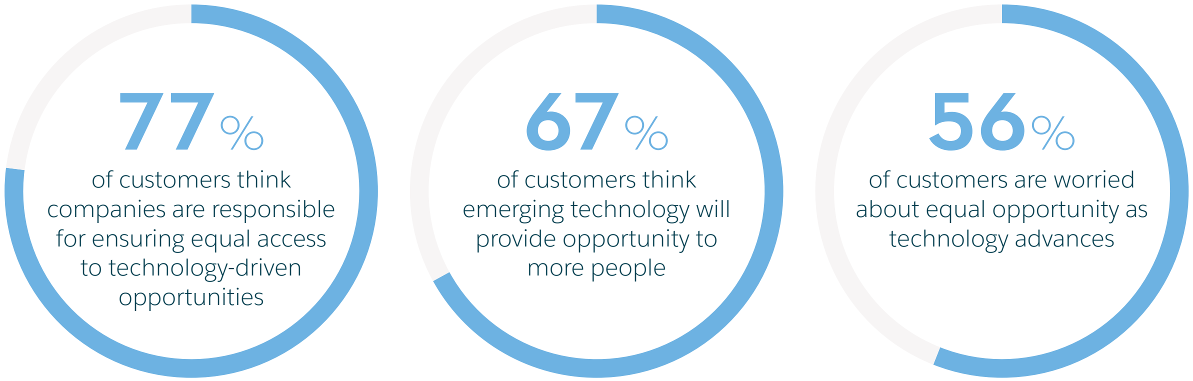
71% of customers expect companies to clearly state their position on equal rights.

Customers Look to Companies to Step Up for Equality

Customers Who Say the Following



Equal Opportunity Is Top of Mind as Technology Advances



77% of customers think companies are responsible for ensuring equal access to technology-driven opportunities

67% of customers think emerging technology will provide opportunity to more people

56% of customers are worried about equal opportunity as technology advances

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* "Ethical Leadership and Business," Salesforce Research, February 2019.
See pages 57 and 58 for additional data segmentations.

04 Corporate Values Sway Buying Decisions

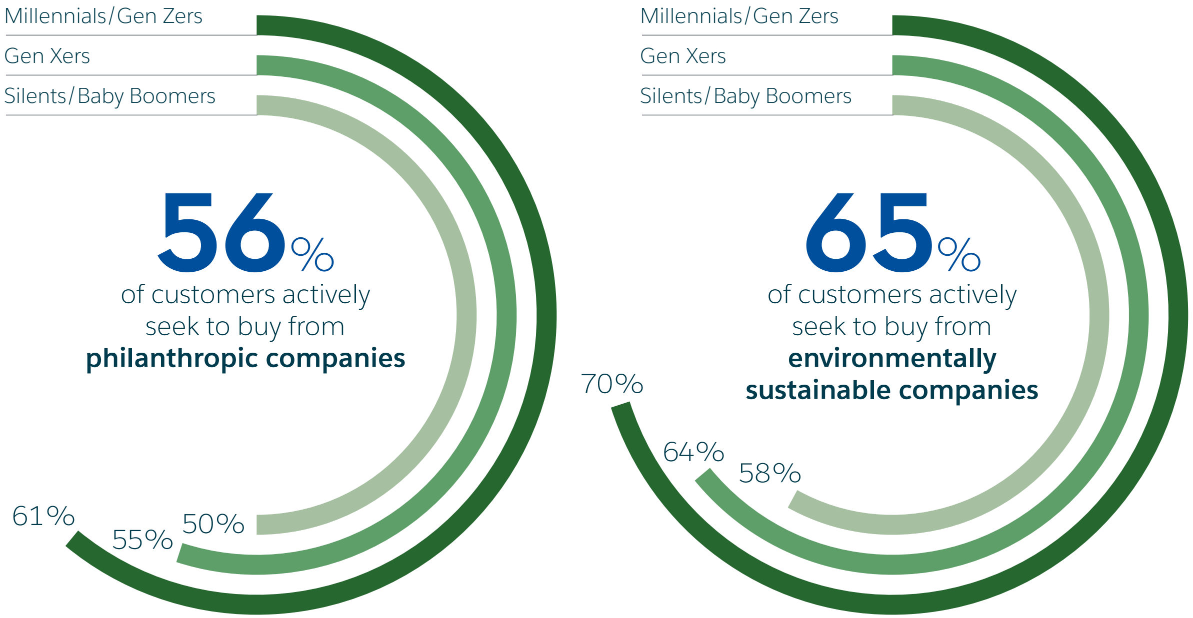
Shareholder interest is the guiding light of business. But customers expect companies to consider a broader set of stakeholders who may or may not benefit financially.

For instance, companies benefit a great deal from the communities where they do business, be it from local talent pools, civic infrastructure, or other resources. The majority of customers believe this relationship should be mutually beneficial, and seek to buy from companies that give back. **Seventy-six percent of customers think companies are responsible for giving back to the communities where they do business.**

Weighing even more on customers' minds is business' role in tackling humanity's greatest challenge: climate change. **Seventy-eight percent of customers think companies are responsible for taking steps to reduce climate change.** The youngest generations, who will experience the greatest effects, are the most likely to shun companies that prioritize short-term profits over the planet's wellbeing.

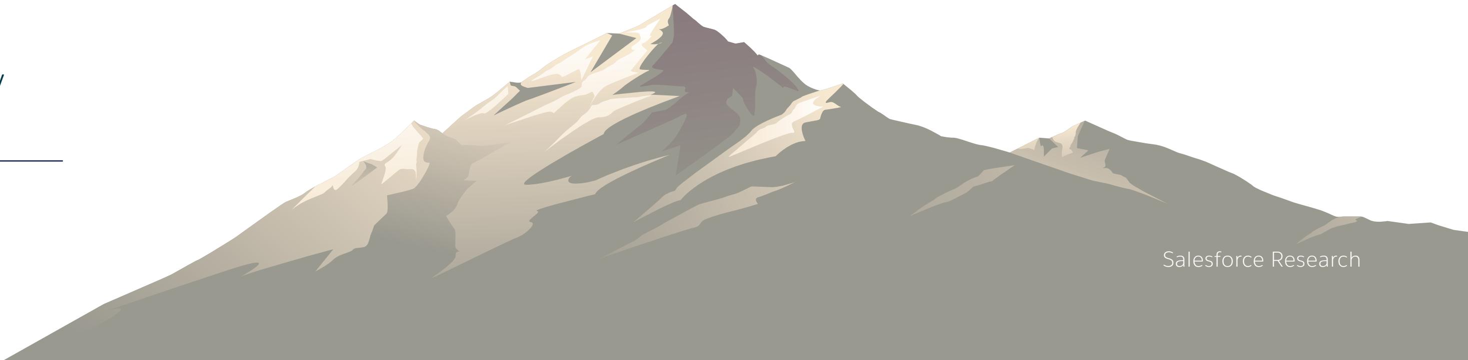
74% of customers say a company's sustainability practices matter more than they did a year ago.

Corporate Responsibility Factors into the Path to Purchase



56% of customers actively seek to buy from **philanthropic companies**

65% of customers actively seek to buy from **environmentally sustainable companies**



See pages 57 and 58 for additional data segmentations.

Last Look

How Well Are Industries Engaging Customers?

Different industries evolve at different paces, and some – due to ingenuity, resources, lack of regulation, or a myriad of other factors – are able to adapt to changing standards of engagement better than others.

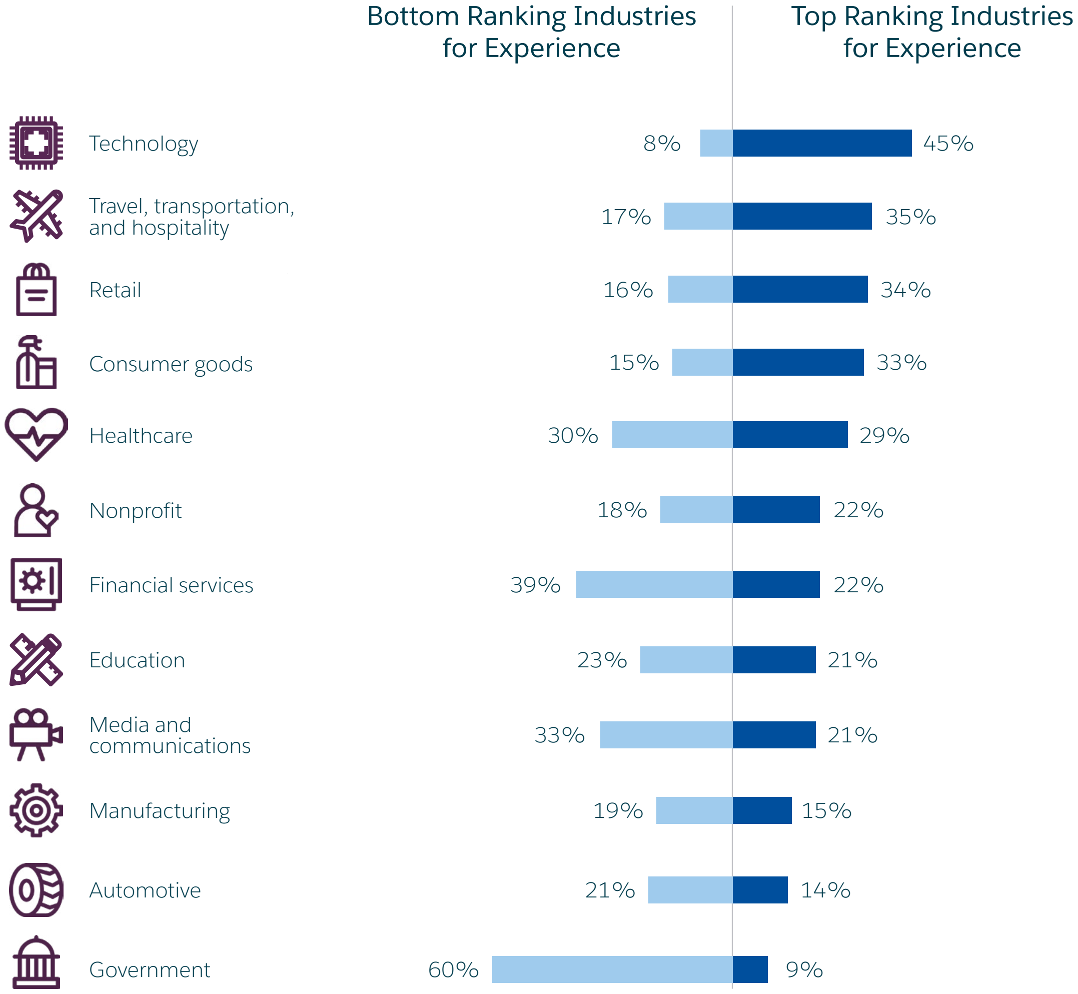
In a digital world, it may come as little surprise that customers are far and away most likely to include technology in their lists of best industries for experience. Travel, transportation, and hospitality – an industry with many businesses whose stated purpose is to comfort its customers – also gets high marks, as does an industry that has experienced its fair share of disruption: retail.

Customers are least impressed with the experiences provided by governments – a likely symptom of perennial funding challenges – and are also unenthusiastic about the experiences afforded by the highly regulated financial services industry. Another tightly regulated industry – healthcare – gets mixed reviews, with nearly the same share of customers naming it as one of the best industries as those naming it one of the worst.

See pages 59 and 60 for additional data segmentations.

As Some Sectors Elevate Engagement, Others Stagnate

Customer Industry Rankings for Experience*



* Respondents were asked to rank the top three and bottom three industries by experience.

Country Profiles

Please keep in mind that cultural bias impacts survey results across countries.

Country Profile

Australia/New Zealand (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

66% of customers expect connected experiences

60% of customers say it generally feels like they're communicating with separate departments, not one company

54% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues
66%

I expect companies to communicate with me in real time
74%

Customers Who List the Following as Preferred Channels

Online chat/live support *(e.g., popup windows on website)*	**39%**	17% 44% 52%
Mobile app	**35%**	9% 35% 55%
Text/SMS	**29%**	18% 31% 35%
Online communities *(i.e., forums)*	**25%**	6% 25% 39%
Voice assistants *(e.g., Siri, Alexa)*	**16%**	1% 19% 23%

New Expectations Shift the Digital Transformation Playbook

68% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me
46%

I'm open to the use of AI to improve my experiences
55%

I use a connected device
82%
82%
63%

I view voice assistants as revolutionary
54%
58%
46%

I can think of an example of AI I use every day
47%
32%
13%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago
77%

I have stopped buying from a company that did something distrustful
65%

I don't believe companies care about the security of my data
41%

I believe most companies aren't transparent about how they use my data
66%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago
77%

I actively seek to buy from philanthropic companies
52%

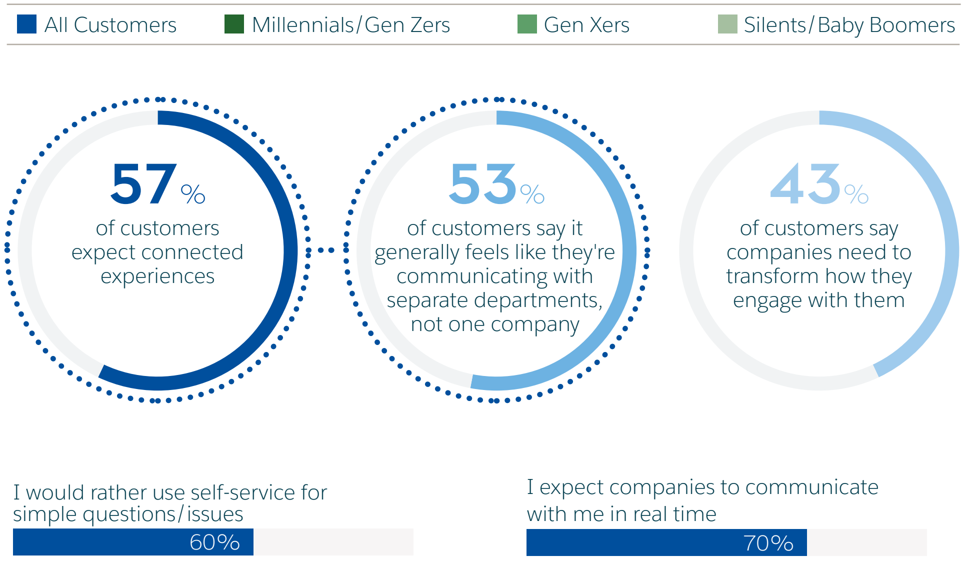
I won't buy from companies that don't value equality
55%

I actively seek to buy from environmentally sustainable companies
64%

Country Profile

Canada (535 customers)

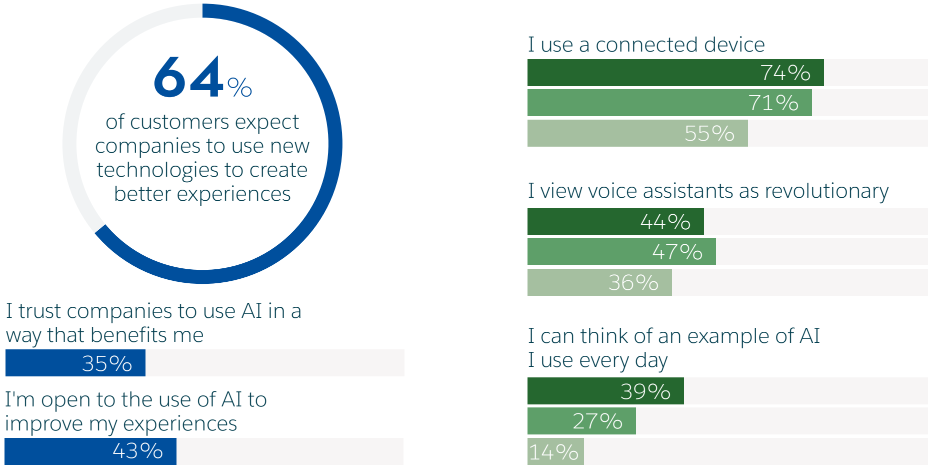
Extraordinary Experiences Raise the Bar for Customer Engagement



Customers Who List the Following as Preferred Channels

Online chat/live support *(e.g., popup windows on website)*	33%	19% · 34% · 45%
Mobile app	25%	10% · 26% · 38%
Text/SMS	20%	10% · 19% · 29%
Online communities *(i.e., forums)*	14%	3% · 14% · 25%
Voice assistants *(e.g., Siri, Alexa)*	9%	3% · 7% · 16%

New Expectations Shift the Digital Transformation Playbook



Trust Becomes More Important, Yet More Elusive

Corporate Values Sway Buying Decisions

Country Profile

France (540 customers)

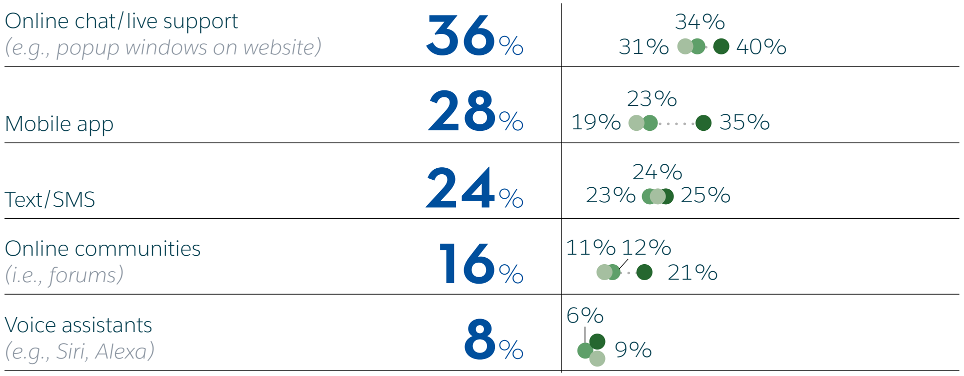
Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

I would rather use self-service for simple questions/issues

I expect companies to communicate with me in real time

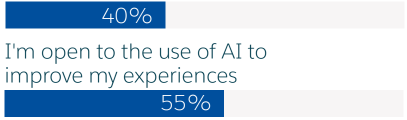
Customers Who List the Following as Preferred Channels



New Expectations Shift the Digital Transformation Playbook

I trust companies to use AI in a way that benefits me

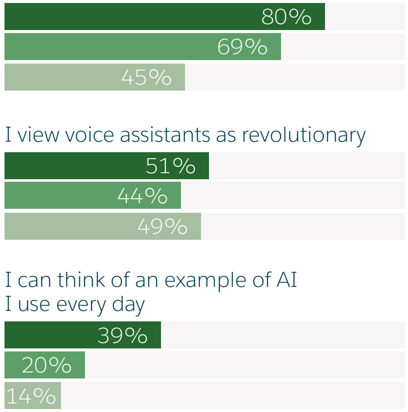
I'm open to the use of AI to improve my experiences



I use a connected device

I view voice assistants as revolutionary

I can think of an example of AI I use every day



Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago

I have stopped buying from a company that did something distrustful

I don't believe companies care about the security of my data

I believe most companies aren't transparent about how they use my data

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago

I actively seek to buy from philanthropic companies

I won't buy from companies that don't value equality

I actively seek to buy from environmentally sustainable companies

Country Profile

Germany (536 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

57% of customers expect connected experiences

51% of customers say it generally feels like they're communicating with separate departments, not one company

39% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues

46%

I expect companies to communicate with me in real time

59%

Customers Who List the Following as Preferred Channels

Mobile app	29%	15% 33% 38%
Online chat/live support *(e.g., popup windows on website)*	28%	15% 28% 38%
Online communities *(i.e., forums)*	20%	10% 20% 27%
Text/SMS	18%	12% 18% 24%
Voice assistants *(e.g., Siri, Alexa)*	12%	8% 10% 17%

New Expectations Shift the Digital Transformation Playbook

58% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me

52%

I'm open to the use of AI to improve my experiences

46%

I use a connected device

78%
72%
48%

I view voice assistants as revolutionary

46%
39%
34%

I can think of an example of AI I use every day

49%
33%
21%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago

72%

I have stopped buying from a company that did something distrustful

48%

I don't believe companies care about the security of my data

47%

I believe most companies aren't transparent about how they use my data

58%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago

69%

I actively seek to buy from philanthropic companies

34%

I won't buy from companies that don't value equality

42%

I actively seek to buy from environmentally sustainable companies

58%

Country Profile

Hong Kong (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

77% of customers expect connected experiences

66% of customers say it generally feels like they're communicating with separate departments, not one company

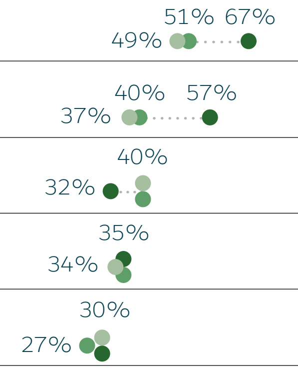
70% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues 78%

I expect companies to communicate with me in real time 75%

Customers Who List the Following as Preferred Channels

Mobile app	57%
Online chat/live support *(e.g., popup windows on website)*	46%
Text/SMS	37%
Online communities *(i.e., forums)*	35%
Voice assistants *(e.g., Siri, Alexa)*	29%



New Expectations Shift the Digital Transformation Playbook

80% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me 56%

I'm open to the use of AI to improve my experiences 70%

I use a connected device 97% 96% 95%

I view voice assistants as revolutionary 57% 60% 59%

I can think of an example of AI I use every day 60% 48% 39%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago 72%

I don't believe companies care about the security of my data 45%

I have stopped buying from a company that did something distrustful 59%

I believe most companies aren't transparent about how they use my data 68%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago 73%

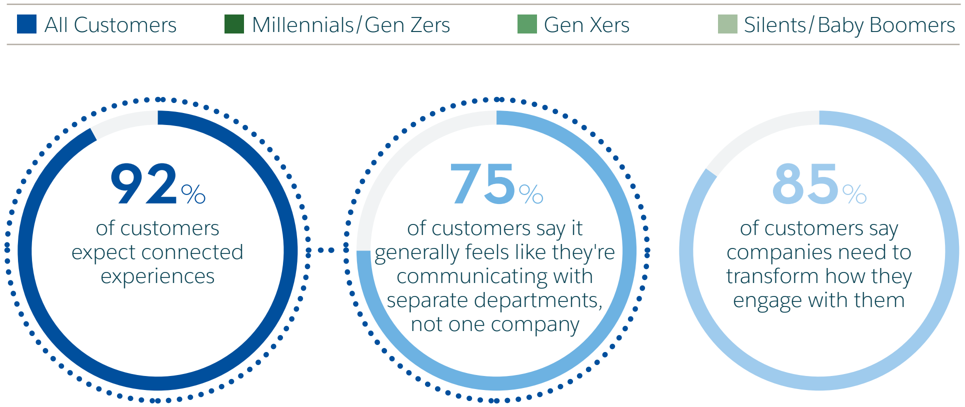
I won't buy from companies that don't value equality 57%

I actively seek to buy from philanthropic companies 71%

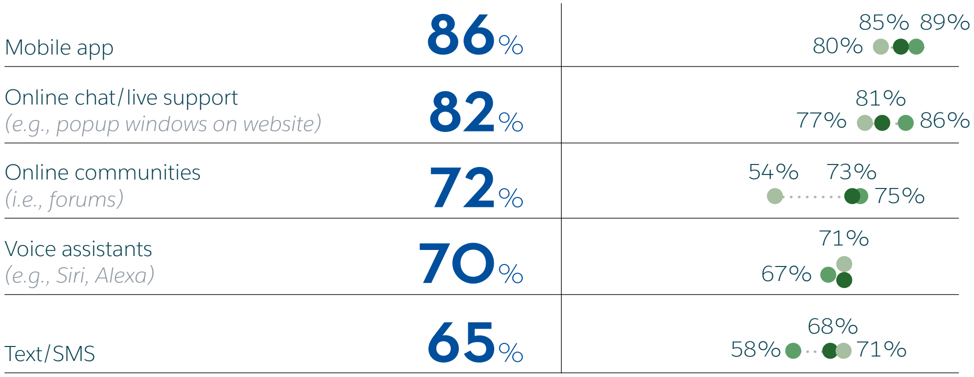
I actively seek to buy from environmentally sustainable companies 71%

Country Profile
India (535 customers)

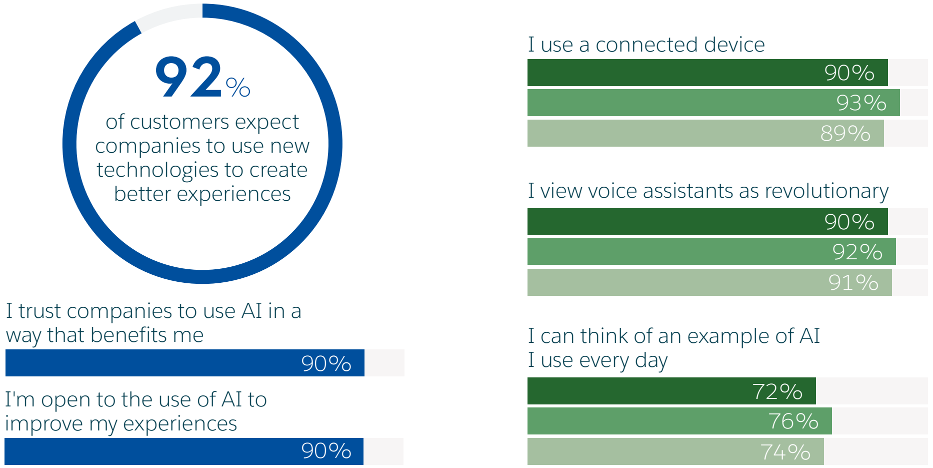
Extraordinary Experiences Raise the Bar for Customer Engagement



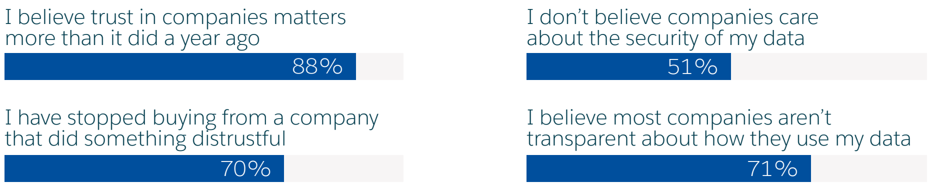
Customers Who List the Following as Preferred Channels



New Expectations Shift the Digital Transformation Playbook



Trust Becomes More Important, Yet More Elusive



Corporate Values Sway Buying Decisions

Country Profile

Italy (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

70% of customers expect connected experiences

54% of customers say it generally feels like they're communicating with separate departments, not one company

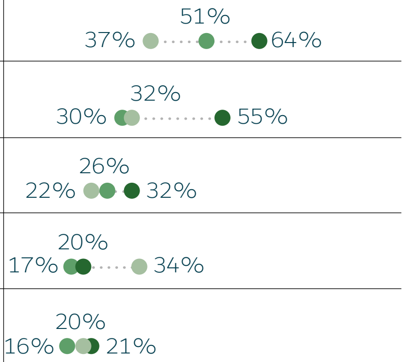
52% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues

I expect companies to communicate with me in real time

Customers Who List the Following as Preferred Channels

Online chat/live support *(e.g., popup windows on website)*	52%
Mobile app	40%
Online communities *(i.e., forums)*	27%
Text/SMS	23%
Voice assistants *(e.g., Siri, Alexa)*	19%



New Expectations Shift the Digital Transformation Playbook

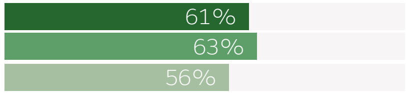
81% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me

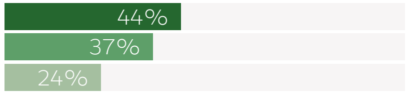
I'm open to the use of AI to improve my experiences

I use a connected device

I view voice assistants as revolutionary



I can think of an example of AI I use every day

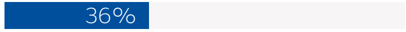


Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago

I have stopped buying from a company that did something distrustful

I don't believe companies care about the security of my data



I believe most companies aren't transparent about how they use my data

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago

I actively seek to buy from philanthropic companies

I won't buy from companies that don't value equality

I actively seek to buy from environmentally sustainable companies

Country Profile

Japan (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

58% of customers expect connected experiences

54% of customers say it generally feels like they're communicating with separate departments, not one company

35% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues 73%

I expect companies to communicate with me in real time 55%

Customers Who List the Following as Preferred Channels

	All Customers	Silents/Baby Boomers	Gen Xers	Millennials/Gen Zers
Mobile app	27%	16%	27%	39%
Text/SMS	24%	16%	27%	28%
Online communities *(e.g., forums)*	19%	11%	21%	25%
Online chat/live support *(e.g., popup windows on website)*	18%	11%	20%	24%
Voice assistants *(e.g., Siri, Alexa)*	13%	11%	14%	15%

New Expectations Shift the Digital Transformation Playbook

71% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me 59%

I'm open to the use of AI to improve my experiences 55%

	Millennials/Gen Zers	Gen Xers	Silents/Baby Boomers
I use a connected device	21%	26%	21%
I view voice assistants as revolutionary	55%	53%	49%
I can think of an example of AI I use every day	28%	29%	22%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago 74%

I have stopped buying from a company that did something distrustful 69%

I don't believe companies care about the security of my data 42%

I believe most companies aren't transparent about how they use my data 64%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago 74%

I actively seek to buy from philanthropic companies 56%

I won't buy from companies that don't value equality 57%

I actively seek to buy from environmentally sustainable companies 56%

Country Profile

Singapore (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

■ All Customers ■ Millennials/Gen Zers ■ Gen Xers ■ Silents/Baby Boomers

78% of customers expect connected experiences

66% of customers say it generally feels like they're communicating with separate departments, not one company

70% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues: 76%

I expect companies to communicate with me in real time: 71%

Customers Who List the Following as Preferred Channels

Mobile app	56%	47% 59% 60%
Online chat/live support *(e.g., popup windows on website)*	56%	42% 60% 62%
Text/SMS	41%	39% 42% 44%
Online communities *(i.e., forums)*	40%	30% 42% 45%
Voice assistants *(e.g., Siri, Alexa)*	30%	25% 29% 35%

New Expectations Shift the Digital Transformation Playbook

82% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me: 63%

I'm open to the use of AI to improve my experiences: 75%

I use a connected device: 85% / 86% / 84%

I view voice assistants as revolutionary: 48% / 57% / 58%

I can think of an example of AI I use every day: 56% / 53% / 41%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago: 81%

I have stopped buying from a company that did something distrustful: 73%

I don't believe companies care about the security of my data: 44%

I believe most companies aren't transparent about how they use my data: 74%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago: 77%

I actively seek to buy from philanthropic companies: 56%

I won't buy from companies that don't value equality: 50%

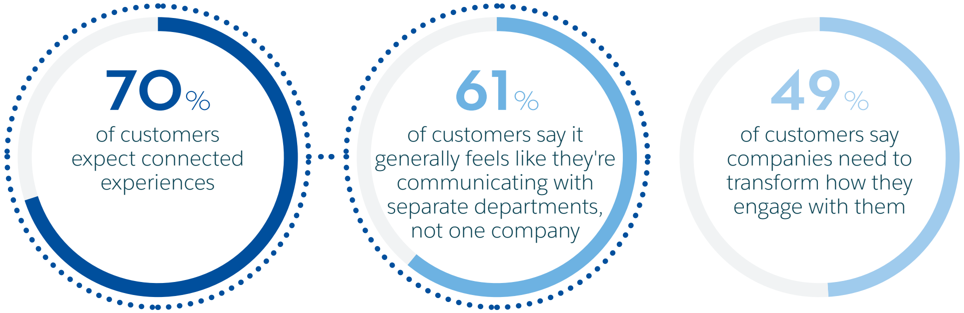
I actively seek to buy from environmentally sustainable companies: 64%

Country Profile

Spain (536 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers



70% of customers expect connected experiences

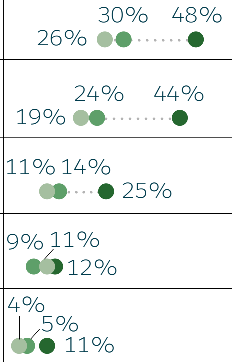
61% of customers say it generally feels like they're communicating with separate departments, not one company

49% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues
57%

I expect companies to communicate with me in real time
77%

Customers Who List the Following as Preferred Channels



Online chat/live support *(e.g., popup windows on website)*	**36%**	26% · 30% · 48%
Mobile app	**30%**	19% · 24% · 44%
Online communities *(i.e., forums)*	**18%**	11% · 14% · 25%
Text/SMS	**11%**	9% · 11% · 12%
Voice assistants *(e.g., Siri, Alexa)*	**7%**	4% · 5% · 11%

New Expectations Shift the Digital Transformation Playbook

84% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me
60%

I'm open to the use of AI to improve my experiences
65%

I use a connected device
83%
79%
76%

I view voice assistants as revolutionary
67%
66%
60%

I can think of an example of AI I use every day
31%
15%
10%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago
68%

I have stopped buying from a company that did something distrustful
73%

I don't believe companies care about the security of my data
39%

I believe most companies aren't transparent about how they use my data
59%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago
72%

I actively seek to buy from philanthropic companies
52%

I won't buy from companies that don't value equality
63%

I actively seek to buy from environmentally sustainable companies
65%

Country Profile

Switzerland (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

71% of customers expect connected experiences

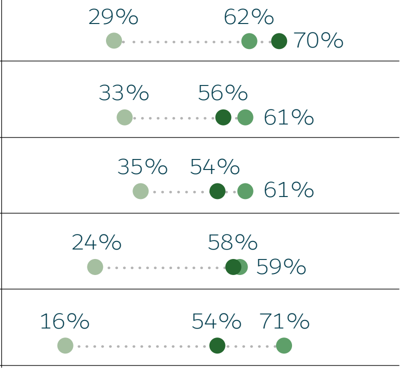
64% of customers say it generally feels like they're communicating with separate departments, not one company

61% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues: 74%

I expect companies to communicate with me in real time: 70%

Customers Who List the Following as Preferred Channels



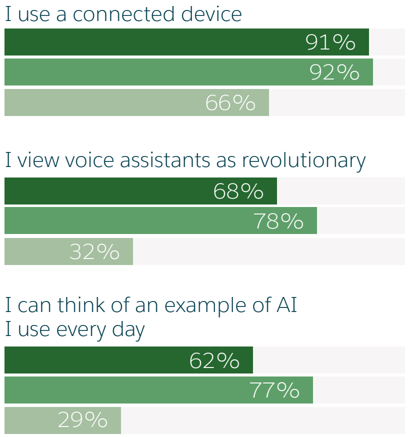
Mobile app	57%
Online chat/live support *(e.g., popup windows on website)*	52%
Text/SMS	51%
Online communities *(i.e., forums)*	50%
Voice assistants *(e.g., Siri, Alexa)*	50%

New Expectations Shift the Digital Transformation Playbook

73% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me: 61%

I'm open to the use of AI to improve my experiences: 67%



Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago: 71%

I don't believe companies care about the security of my data: 47%

I have stopped buying from a company that did something distrustful: 80%

I believe most companies aren't transparent about how they use my data: 69%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago: 74%

I won't buy from companies that don't value equality: 59%

I actively seek to buy from philanthropic companies: 67%

I actively seek to buy from environmentally sustainable companies: 74%

Country Profile

Thailand (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

87% of customers expect connected experiences

48% of customers say it generally feels like they're communicating with separate departments, not one company

75% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues
86%

I expect companies to communicate with me in real time
77%

Customers Who List the Following as Preferred Channels

	All Customers	Millennials/Gen Zers	Gen Xers	Silents/Baby Boomers
Mobile app	70%	76%	68%	57%
Online chat/live support *(e.g., popup windows on website)*	63%	65%	57%	66%
Online communities *(i.e., forums)*	52%	52%	46%	63%
Voice assistants *(e.g., Siri, Alexa)*	35%	32%	24%	66%
Text/SMS	33%	27%	24%	68%

New Expectations Shift the Digital Transformation Playbook

91% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me
75%

I'm open to the use of AI to improve my experiences
86%

	Millennials/Gen Zers	Gen Xers	Silents/Baby Boomers
I use a connected device	100%	100%	99%
I view voice assistants as revolutionary	68%	68%	87%
I can think of an example of AI I use every day	67%	59%	68%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago
82%

I have stopped buying from a company that did something distrustful
87%

I don't believe companies care about the security of my data
45%

I believe most companies aren't transparent about how they use my data
47%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago
81%

I actively seek to buy from philanthropic companies
83%

I won't buy from companies that don't value equality
68%

I actively seek to buy from environmentally sustainable companies
81%

Country Profile

United Kingdom/Ireland (540 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

60% of customers expect connected experiences

56% of customers say it generally feels like they're communicating with separate departments, not one company

43% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues

66%

I expect companies to communicate with me in real time

69%

Customers Who List the Following as Preferred Channels

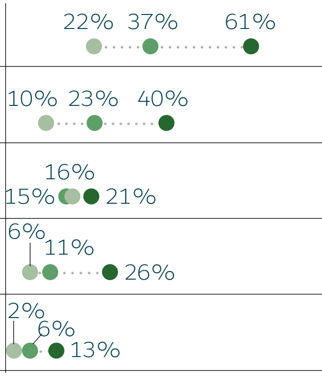
Online chat/live support
(e.g., popup windows on website) **41%**

Mobile app **26%**

Text/SMS **18%**

Online communities
(i.e., forums) **15%**

Voice assistants
(e.g., Siri, Alexa) **7%**



New Expectations Shift the Digital Transformation Playbook

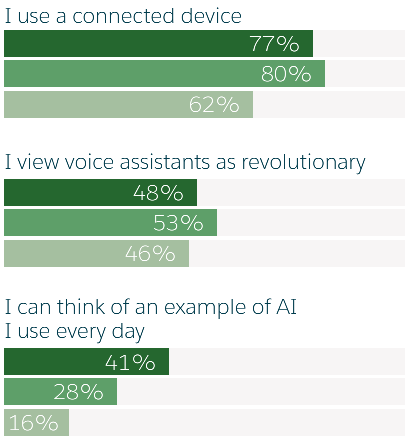
67% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me

37%

I'm open to the use of AI to improve my experiences

53%



Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago

66%

I have stopped buying from a company that did something distrustful

46%

I don't believe companies care about the security of my data

36%

I believe most companies aren't transparent about how they use my data

59%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago

65%

I actively seek to buy from philanthropic companies

41%

I won't buy from companies that don't value equality

46%

I actively seek to buy from environmentally sustainable companies

51%

Country Profile

United States (1,055 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

64% of customers expect connected experiences

57% of customers say it generally feels like they're communicating with separate departments, not one company

44% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues
68%

I expect companies to communicate with me in real time
74%

Customers Who List the Following as Preferred Channels

Online chat/live support
(e.g., popup windows on website)
44%
27% 45% 57%

Mobile app
38%
18% 36% 56%

Text/SMS
33%
19% 35% 42%

Online communities
(i.e., forums)
21%
9% 20% 32%

Voice assistants
(e.g., Siri, Alexa)
13%
3% 11% 22%

New Expectations Shift the Digital Transformation Playbook

72% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me
43%

I'm open to the use of AI to improve my experiences
53%

I use a connected device
84%
79%
65%

I view voice assistants as revolutionary
58%
55%
52%

I can think of an example of AI I use every day
49%
33%
18%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago
73%

I have stopped buying from a company that did something distrustful
60%

I don't believe companies care about the security of my data
34%

I believe most companies aren't transparent about how they use my data
63%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago
71%

I actively seek to buy from philanthropic companies
52%

I won't buy from companies that don't value equality
52%

I actively seek to buy from environmentally sustainable companies
56%

Regional Profiles

Please keep in mind that cultural bias impacts survey results across regions.

Regional Profile

North America (1,590 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

62% of customers expect connected experiences

55% of customers say it generally feels like they're communicating with separate departments, not one company

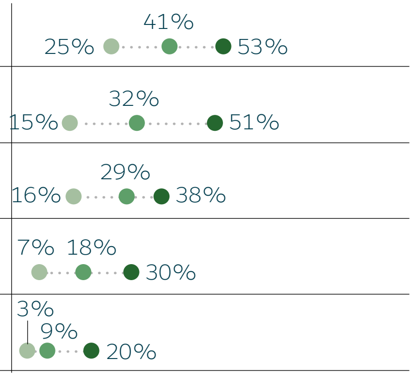
44% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues

I expect companies to communicate with me in real time

Customers Who List the Following as Preferred Channels

Online chat/live support *(e.g., popup windows on website)*	40%
Mobile app	34%
Text/SMS	28%
Online communities *(i.e., forums)*	19%
Voice assistants *(e.g., Siri, Alexa)*	12%

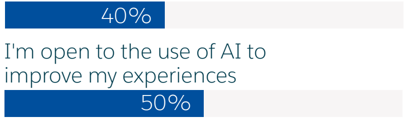


New Expectations Shift the Digital Transformation Playbook

69% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me

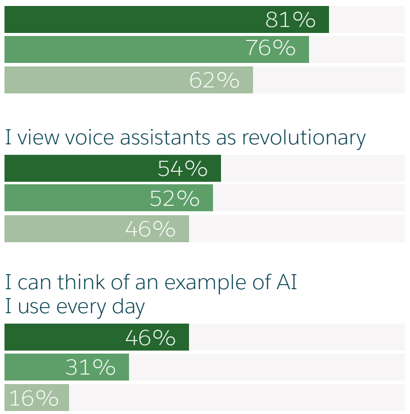
I'm open to the use of AI to improve my experiences



I use a connected device

I view voice assistants as revolutionary

I can think of an example of AI I use every day



Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago

I don't believe companies care about the security of my data

I have stopped buying from a company that did something distrustful

I believe most companies aren't transparent about how they use my data

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago

I won't buy from companies that don't value equality

I actively seek to buy from philanthropic companies

I actively seek to buy from environmentally sustainable companies

Regional Profile
Europe (3,222 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

64% of customers expect connected experiences

58% of customers say it generally feels like they're communicating with separate departments, not one company

49% of customers say companies need to transform how they engage with them

Statement	All Customers
I would rather use self-service for simple questions/issues	60%
I expect companies to communicate with me in real time	69%

Customers Who List the Following as Preferred Channels

Channel	All Customers	Silents/Baby Boomers	Gen Xers	Millennials/Gen Zers
Online chat/live support *(e.g., popup windows on website)*	41%	27%	40%	51%
Mobile app	35%	20%	33%	47%
Online communities *(i.e., forums)*	24%	14%	24%	32%
Text/SMS	24%	22%	24%	26%
Voice assistants *(e.g., Siri, Alexa)*	17%	10%	19%	21%

New Expectations Shift the Digital Transformation Playbook

72% of customers expect companies to use new technologies to create better experiences

Statement	All Customers
I trust companies to use AI in a way that benefits me	51%
I'm open to the use of AI to improve my experiences	58%

Statement	Millennials/Gen Zers	Gen Xers	Silents/Baby Boomers
I use a connected device	83%	80%	62%
I view voice assistants as revolutionary	57%	58%	46%
I can think of an example of AI I use every day	44%	35%	19%

Trust Becomes More Important, Yet More Elusive

Statement	All Customers
I believe trust in companies matters more than it did a year ago	69%
I have stopped buying from a company that did something distrustful	62%
I don't believe companies care about the security of my data	42%
I believe most companies aren't transparent about how they use my data	60%

Corporate Values Sway Buying Decisions

Statement	All Customers
I believe a company's ethics matter more than they did a year ago	69%
I actively seek to buy from philanthropic companies	49%
I won't buy from companies that don't value equality	53%
I actively seek to buy from environmentally sustainable companies	65%

Regional Profile

Japan and Asia Pacific (3,210 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

🟦 All Customers 🟩 Millennials/Gen Zers 🟩 Gen Xers 🟩 Silents/Baby Boomers

76% of customers expect connected experiences

61% of customers say it generally feels like they're communicating with separate departments, not one company

65% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues: 78%

I expect companies to communicate with me in real time: 73%

Customers Who List the Following as Preferred Channels

Channel	All Customers	Silents/Baby Boomers	Gen Xers	Millennials/Gen Zers
Mobile app	55%	34%	54%	67%
Online chat/live support *(e.g., popup windows on website)*	51%	32%	50%	60%
Online communities *(i.e., forums)*	40%	25%	40%	49%
Text/SMS	38%	34%	36%	41%
Voice assistants *(e.g., Siri, Alexa)*	32%	25%	30%	37%

New Expectations Shift the Digital Transformation Playbook

81% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me: 65%

I'm open to the use of AI to improve my experiences: 72%

	Millennials/Gen Zers	Gen Xers	Silents/Baby Boomers
I use a connected device	83%	81%	67%
I view voice assistants as revolutionary	65%	63%	58%
I can think of an example of AI I use every day	58%	49%	34%

Trust Becomes More Important, Yet More Elusive

I believe trust in companies matters more than it did a year ago: 79%

I don't believe companies care about the security of my data: 45%

I have stopped buying from a company that did something distrustful: 70%

I believe most companies aren't transparent about how they use my data: 65%

Corporate Values Sway Buying Decisions

I believe a company's ethics matter more than they did a year ago: 78%

I won't buy from companies that don't value equality: 60%

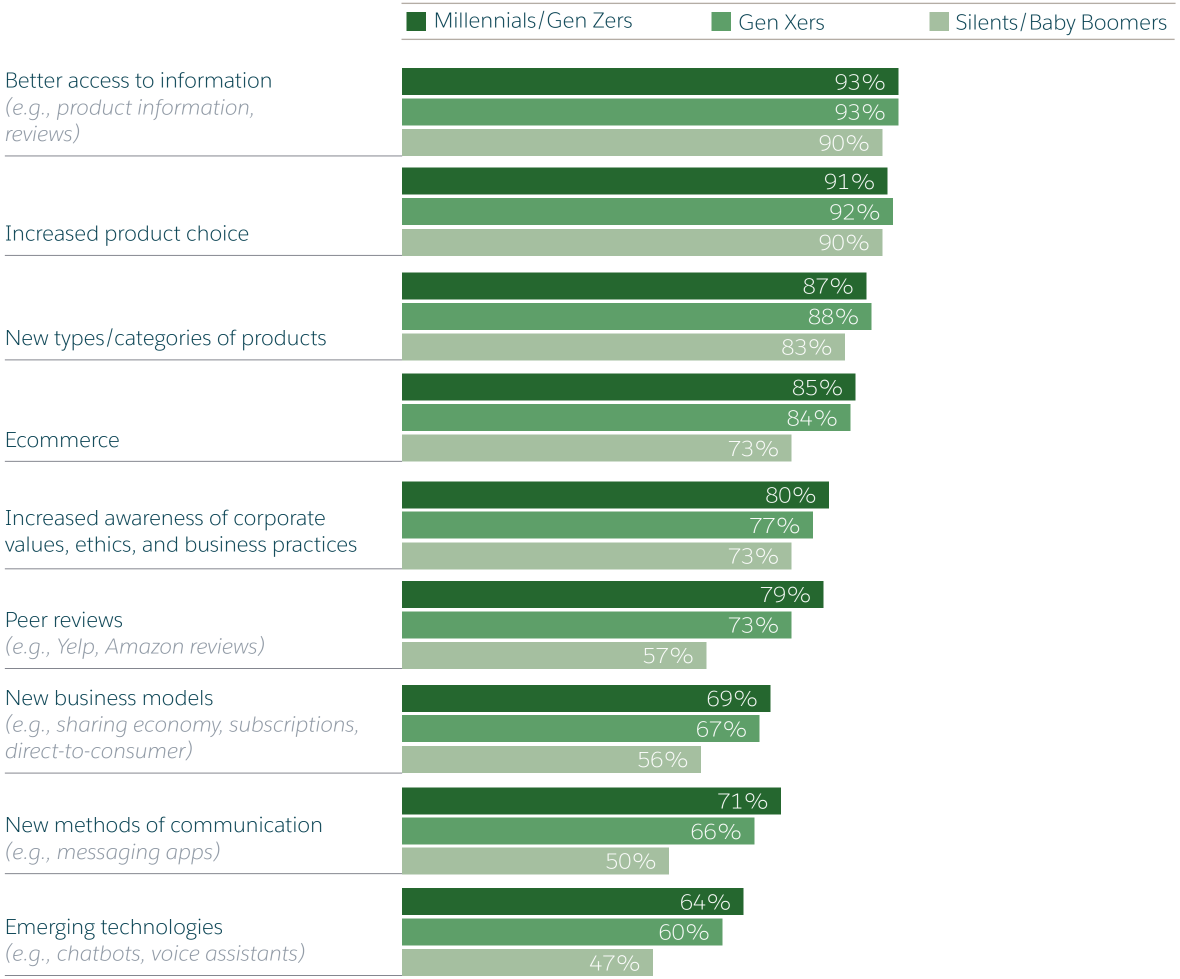
I actively seek to buy from philanthropic companies: 67%

I actively seek to buy from environmentally sustainable companies: 71%

Appendix

Appendix
Introduction

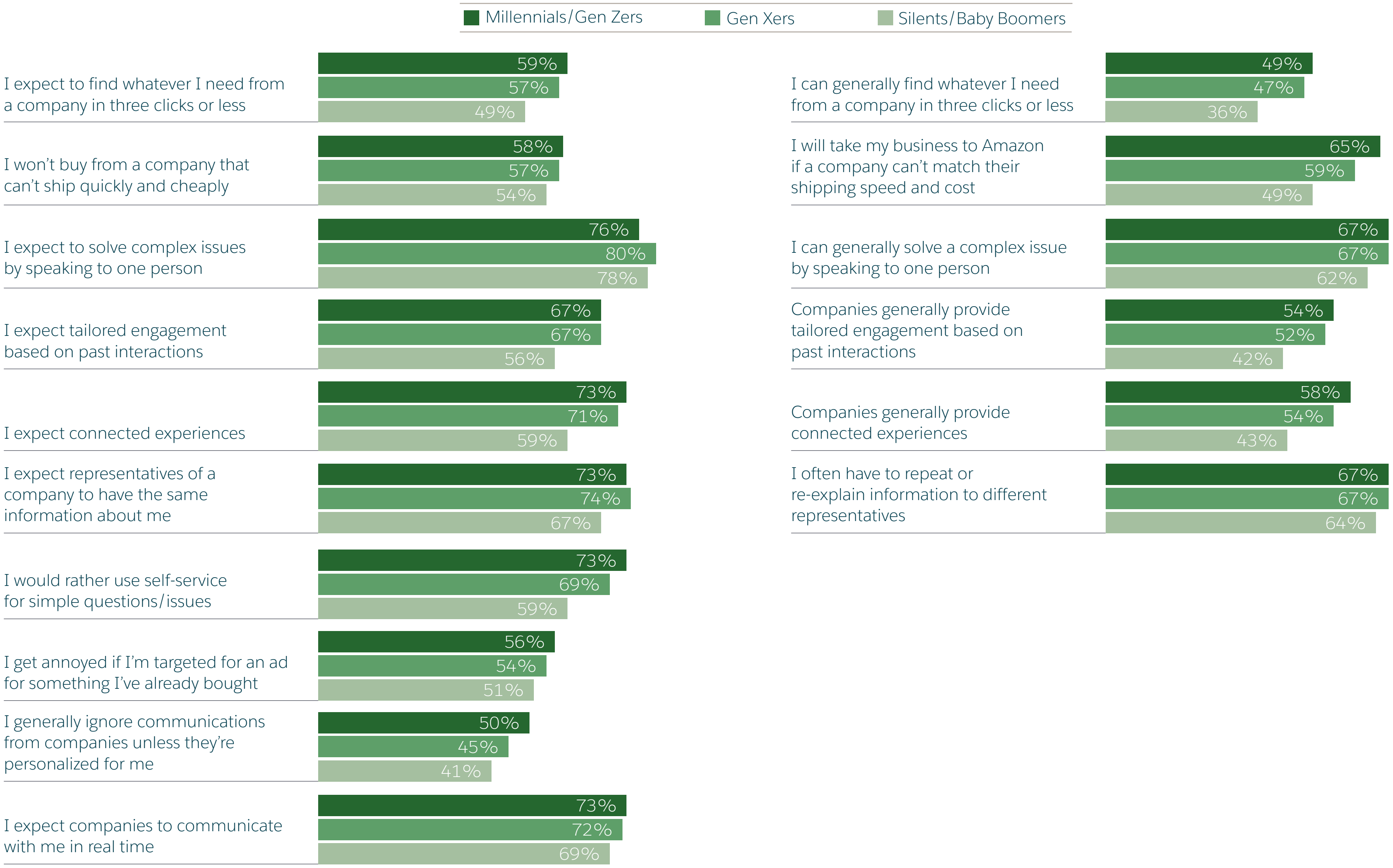
Customers Who Say These Factors Change Their Expectations, by Generation



Appendix

Extraordinary Experiences Raise the Bar for Customer Engagement

Customers Who Say the Following, by Generation



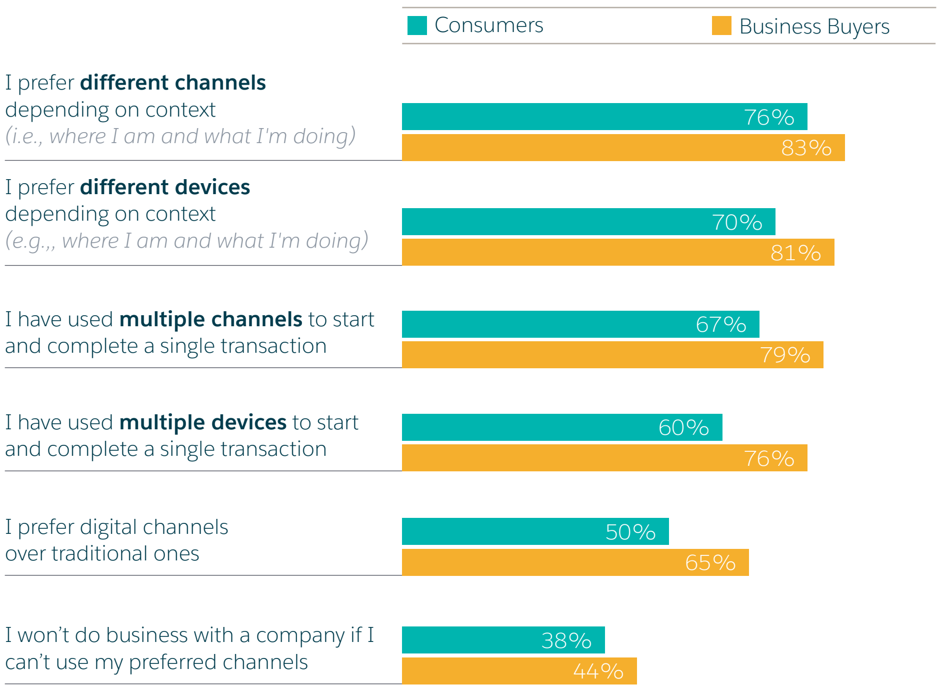
Appendix

Extraordinary Experiences Raise the Bar for Customer Engagement

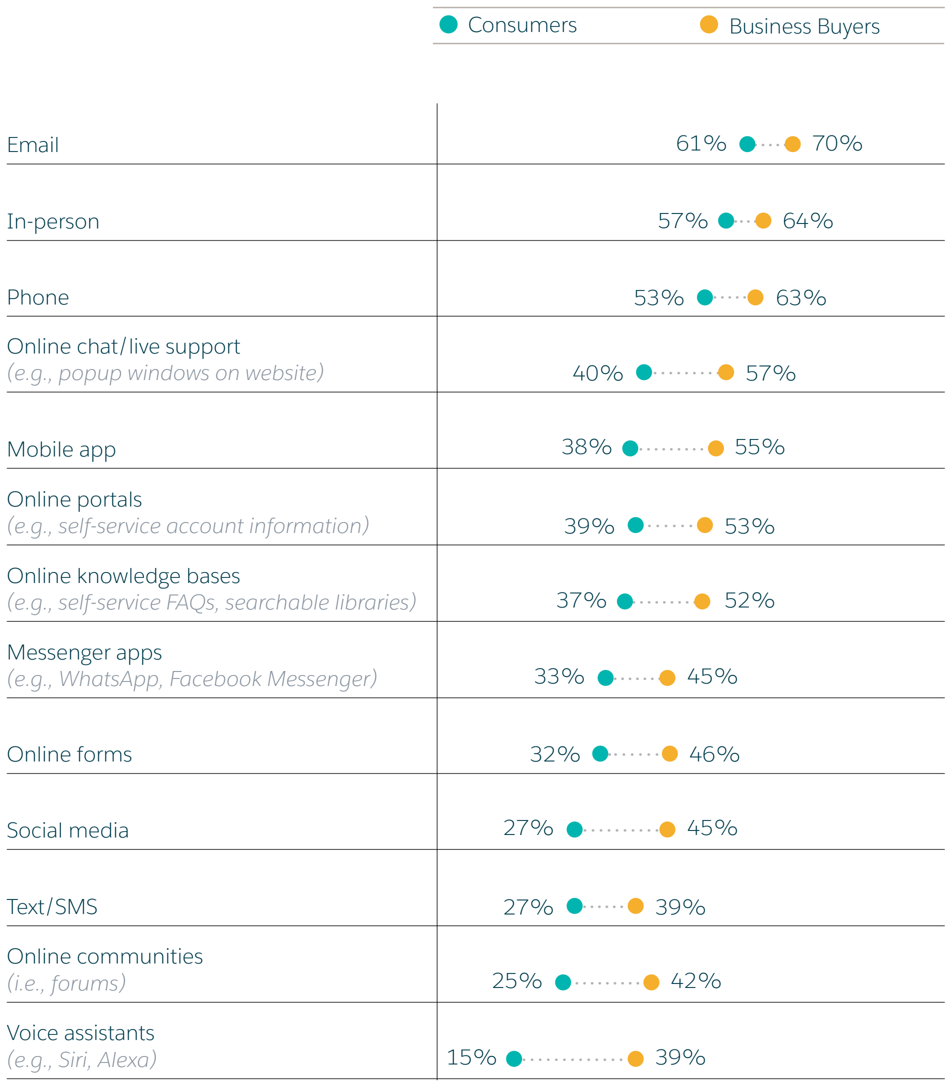
Customers Who Say the Following, by Customer Type

Appendix

Extraordinary Experiences Raise the Bar for Customer Engagement



Customers Who Say the Following, by Customer Type

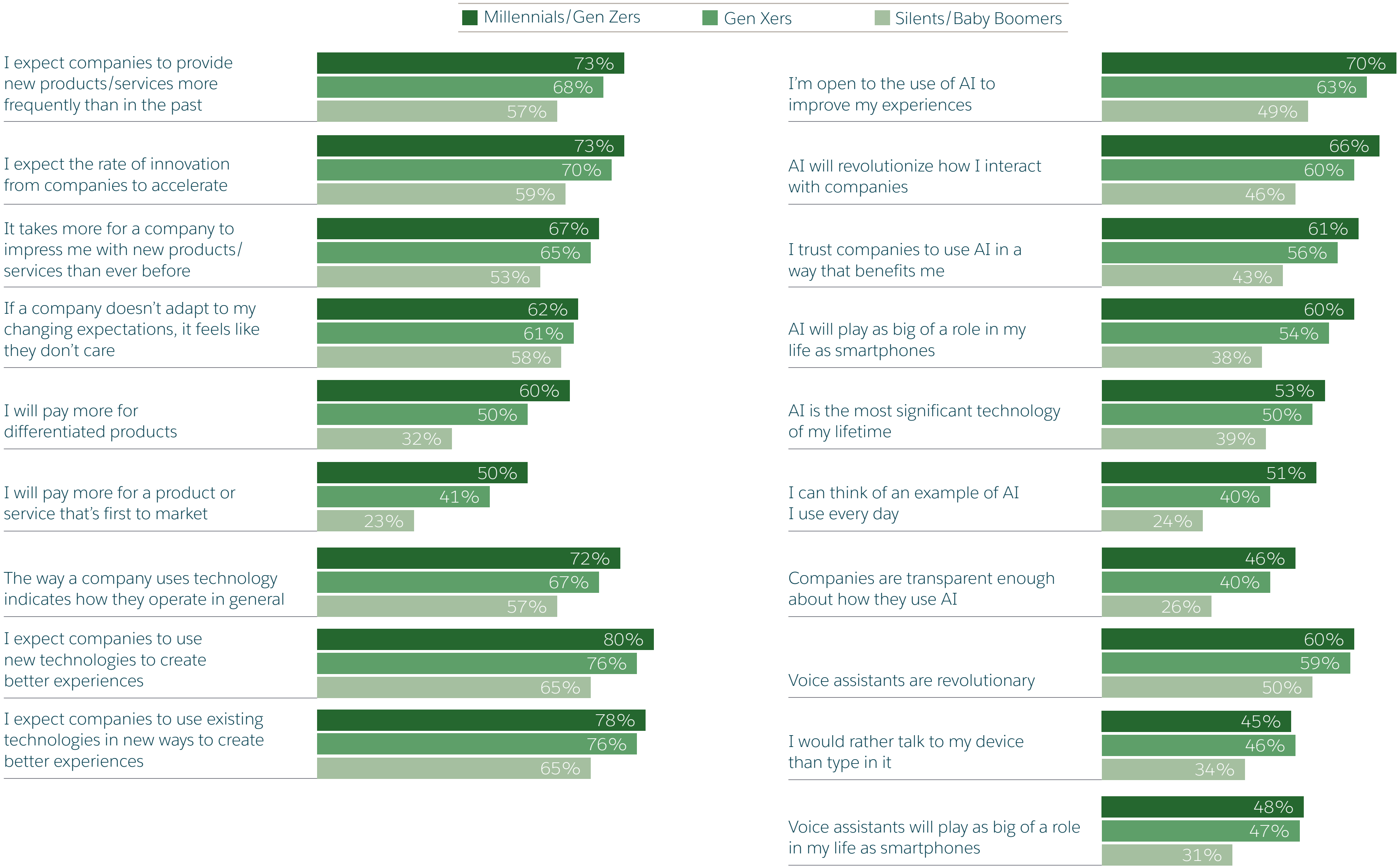


Customers Who Prefer the Following Channels When Communicating with Companies, by Customer Type

Appendix

New Expectations Shift the Digital Transformation Playbook

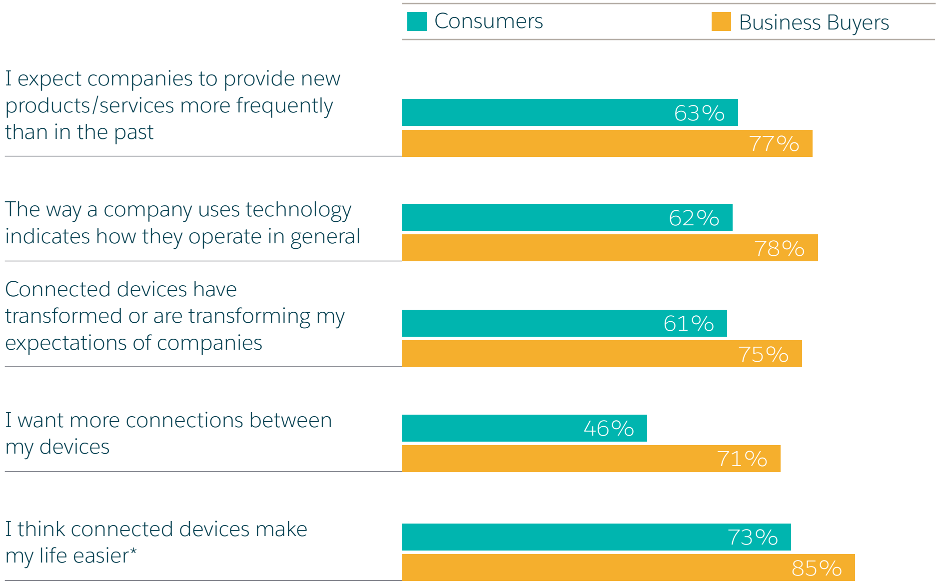
Customers Who Say the Following, by Generation



Appendix

New Expectations Shift the Digital Transformation Playbook

Customers Who Say the Following, by Customer Type



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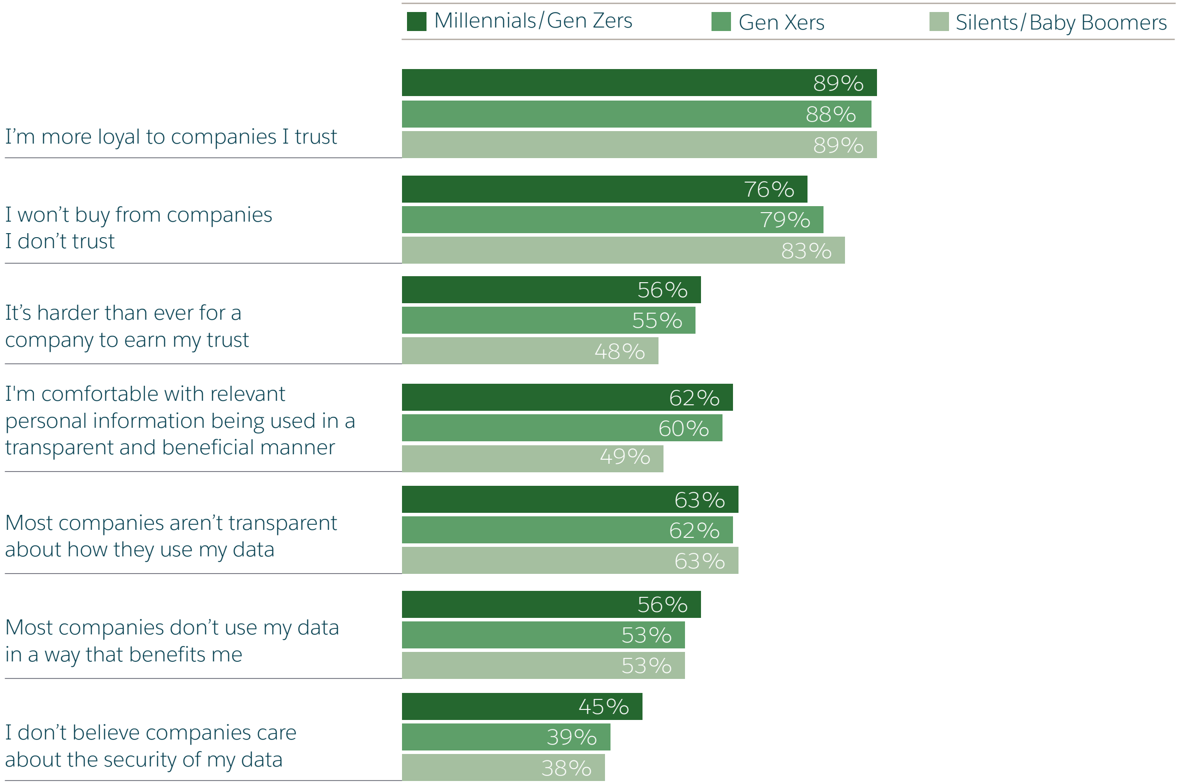
* Base is respondents who use a connected device.

Appendix

Trust Becomes More Important, Yet More Elusive

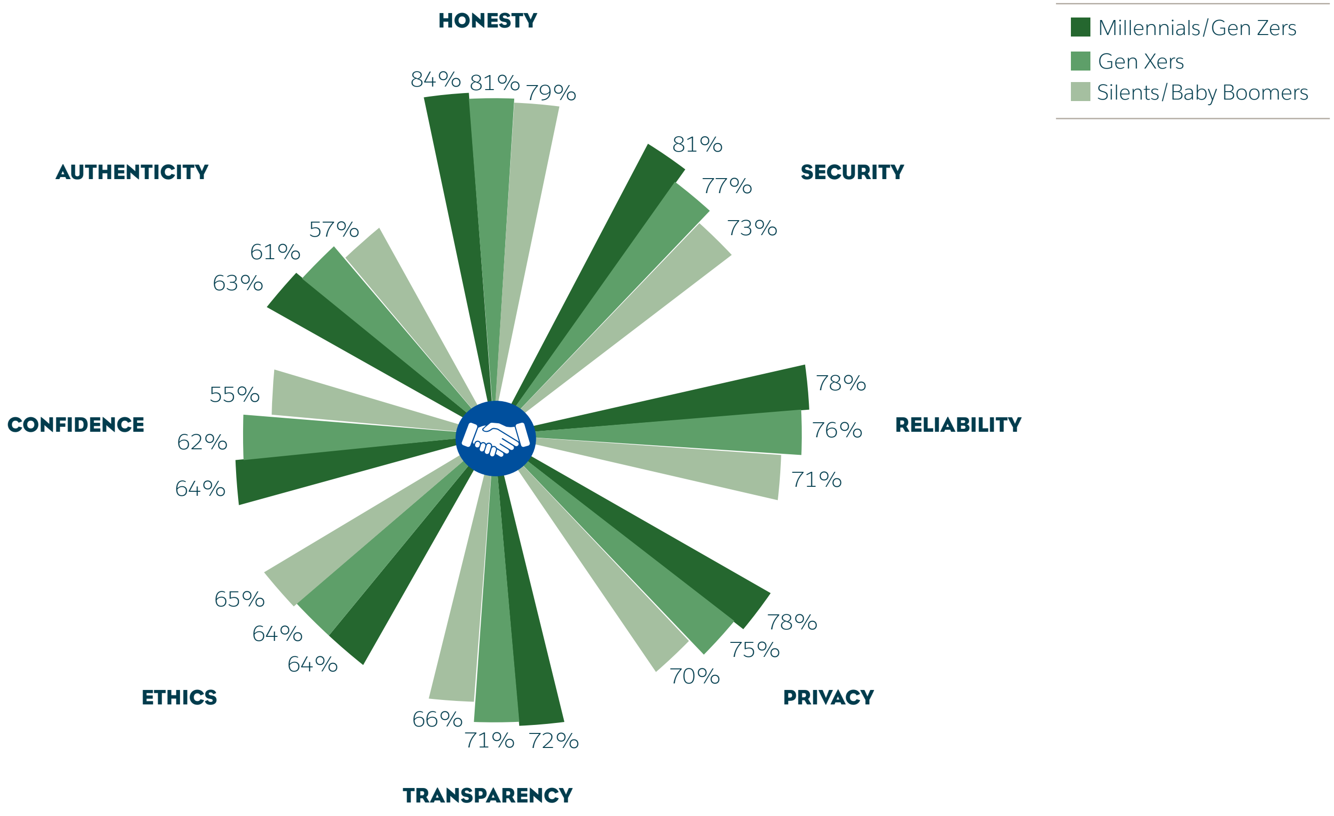
Customers Who Say the Following, by Generation



Appendix

Trust Becomes More Important, Yet More Elusive

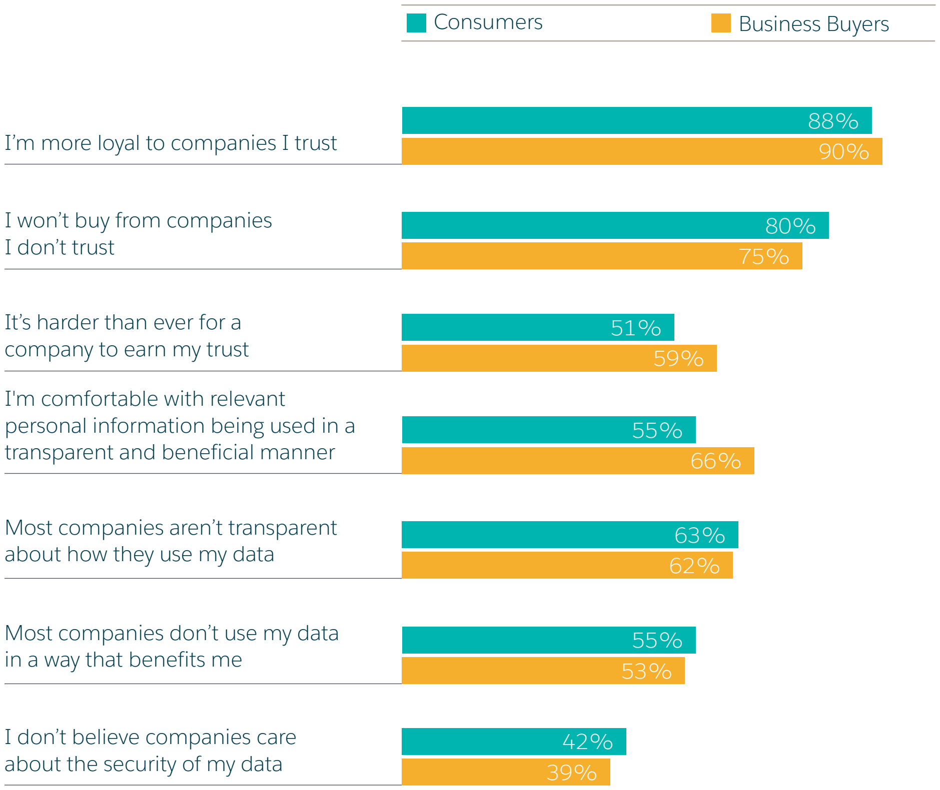
Customers Who Strongly Associate the Following with Trust, by Generation



Appendix

Trust Becomes More Important, Yet More Elusive

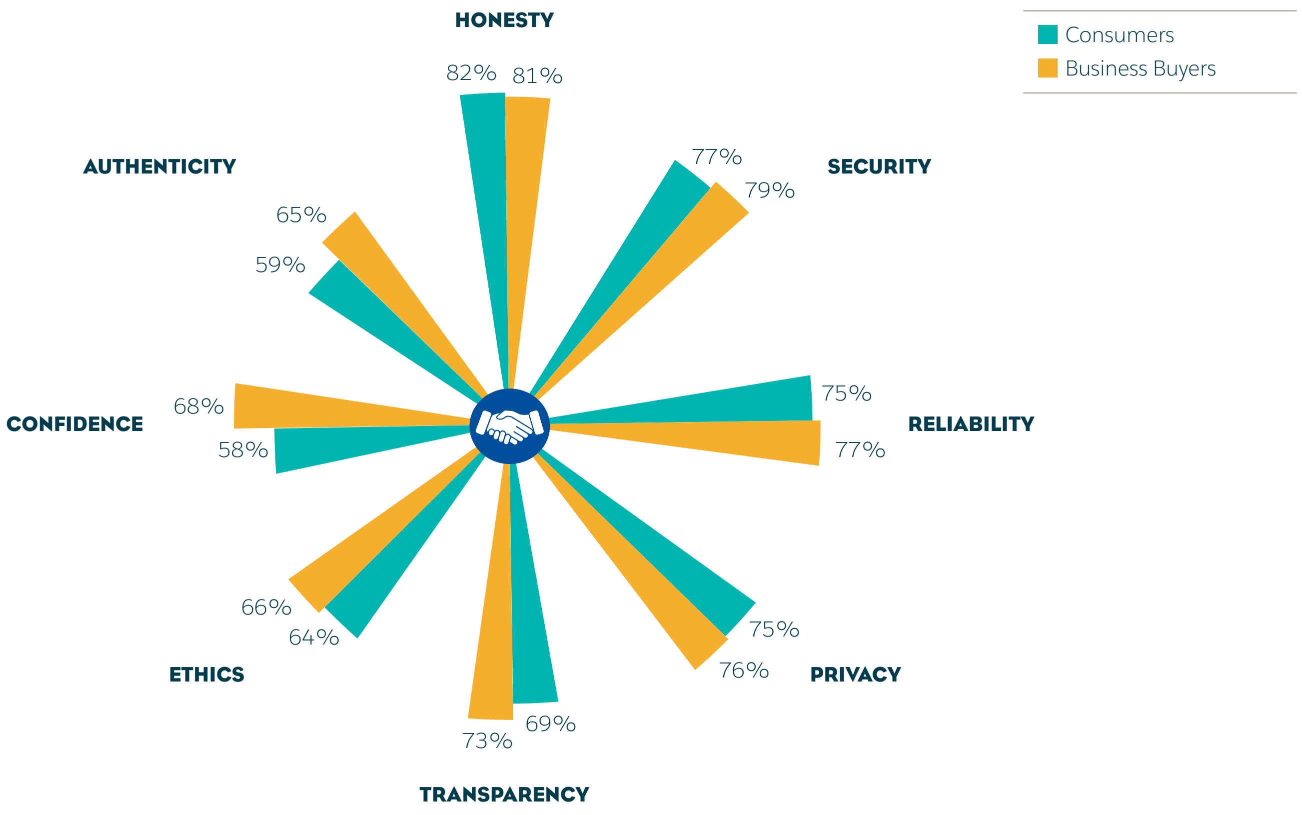
Customers Who Say the Following, by Customer Type



Appendix

Trust Becomes More Important, Yet More Elusive

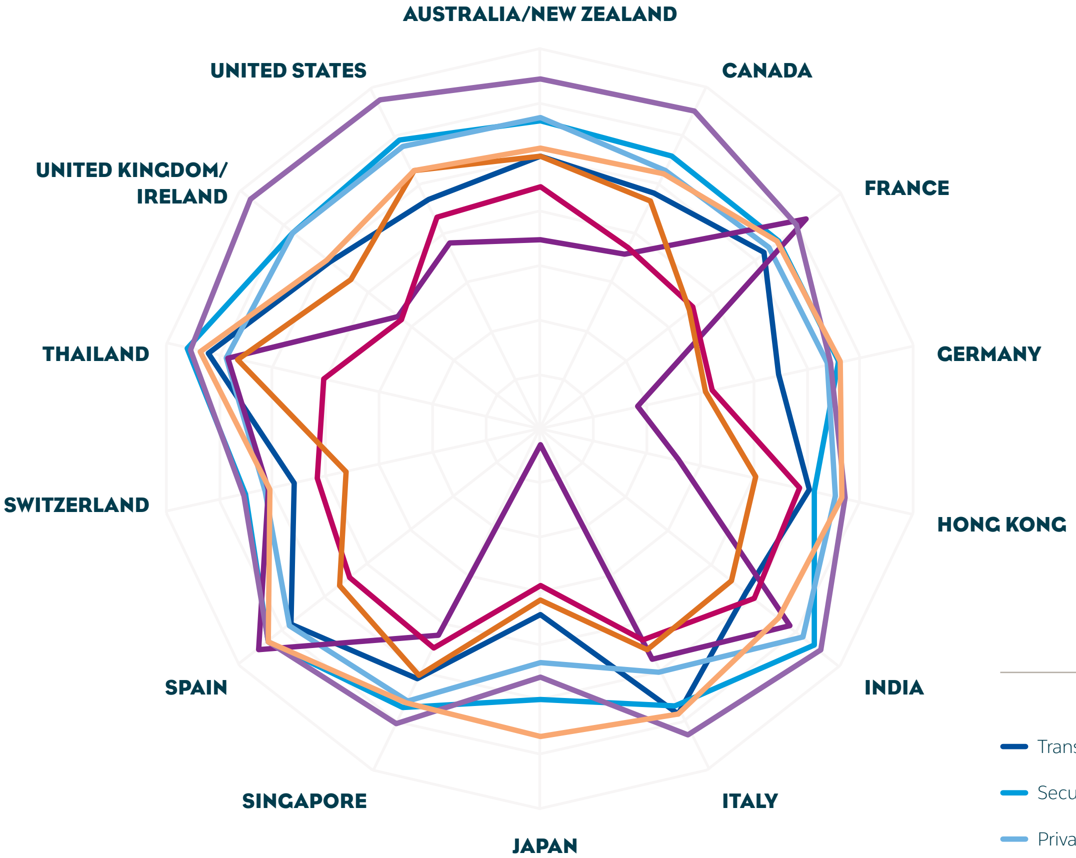
Customers Who Strongly Associate the Following with Trust, by Customer Type



Appendix

Trust Becomes More Important, Yet More Elusive

Customers Who Strongly Associate the Following with Trust, by Country

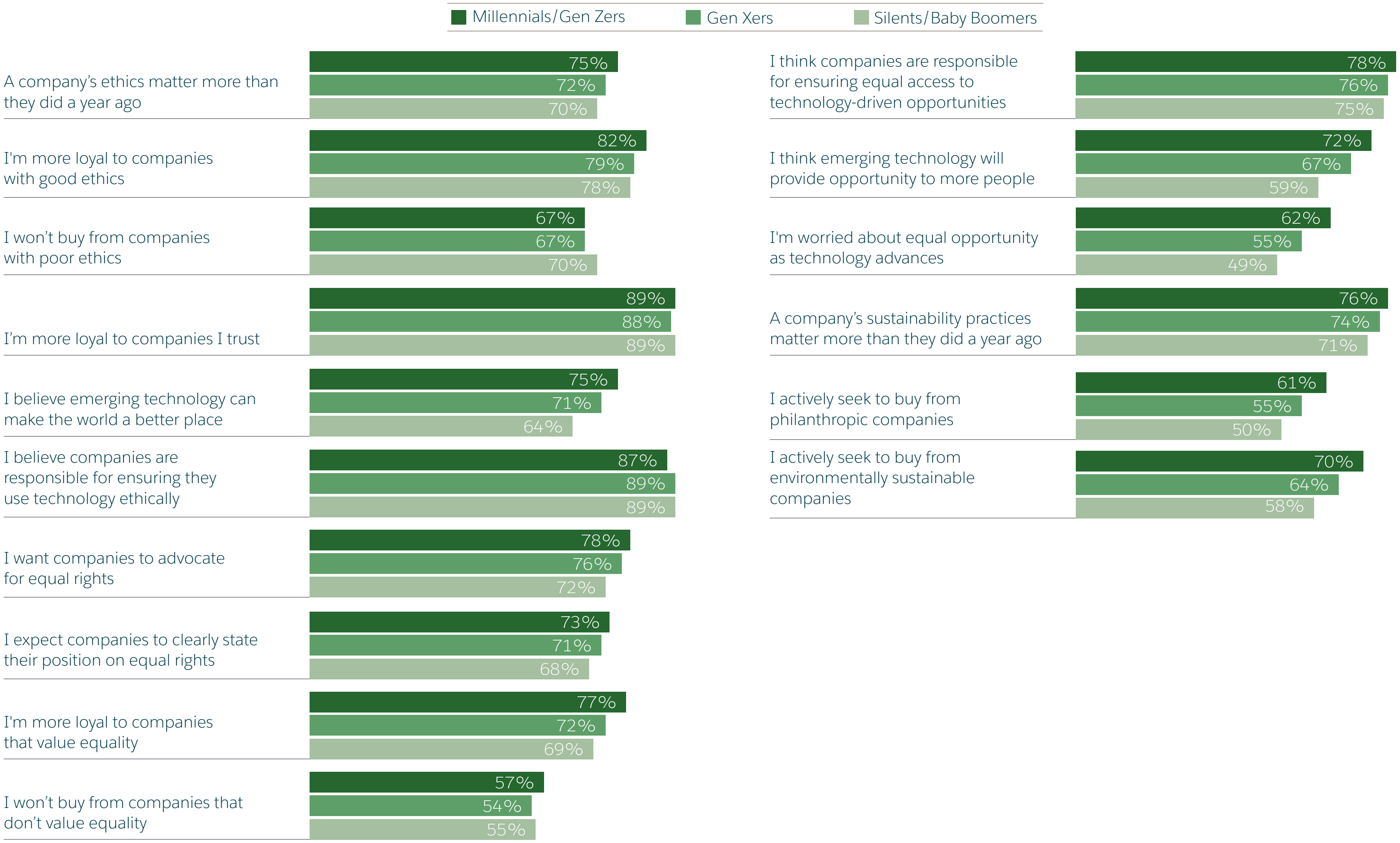


	AU/ NZ	CA	FR	DE	HK	IN	IT	JP	SG	ES	CH	TH	GB/ IE	US
Transparency	70%	68%	72%	65%	70%	68%	79%	54%	71%	78%	66%	82%	69%	67%
Security	77%	76%	76%	76%	71%	84%	77%	70%	77%	83%	75%	86%	78%	79%
Privacy	78%	73%	74%	74%	75%	82%	70%	63%	76%	79%	71%	79%	78%	78%
Confidence	55%	56%	82%	38%	46%	79%	67%	23%	62%	86%	71%	79%	53%	58%
Honesty	85%	85%	80%	74%	77%	86%	83%	66%	80%	83%	75%	86%	88%	87%
Authenticity	65%	57%	56%	52%	69%	70%	63%	49%	65%	64%	62%	61%	52%	64%
Ethics	70%	67%	55%	51%	61%	65%	65%	52%	71%	67%	56%	77%	64%	73%
Reliability	72%	72%	75%	76%	77%	76%	79%	77%	76%	83%	71%	84%	70%	73%

Appendix

Corporate Values Sway Buying Decisions

Customers Who Say the Following, by Generation



Appendix

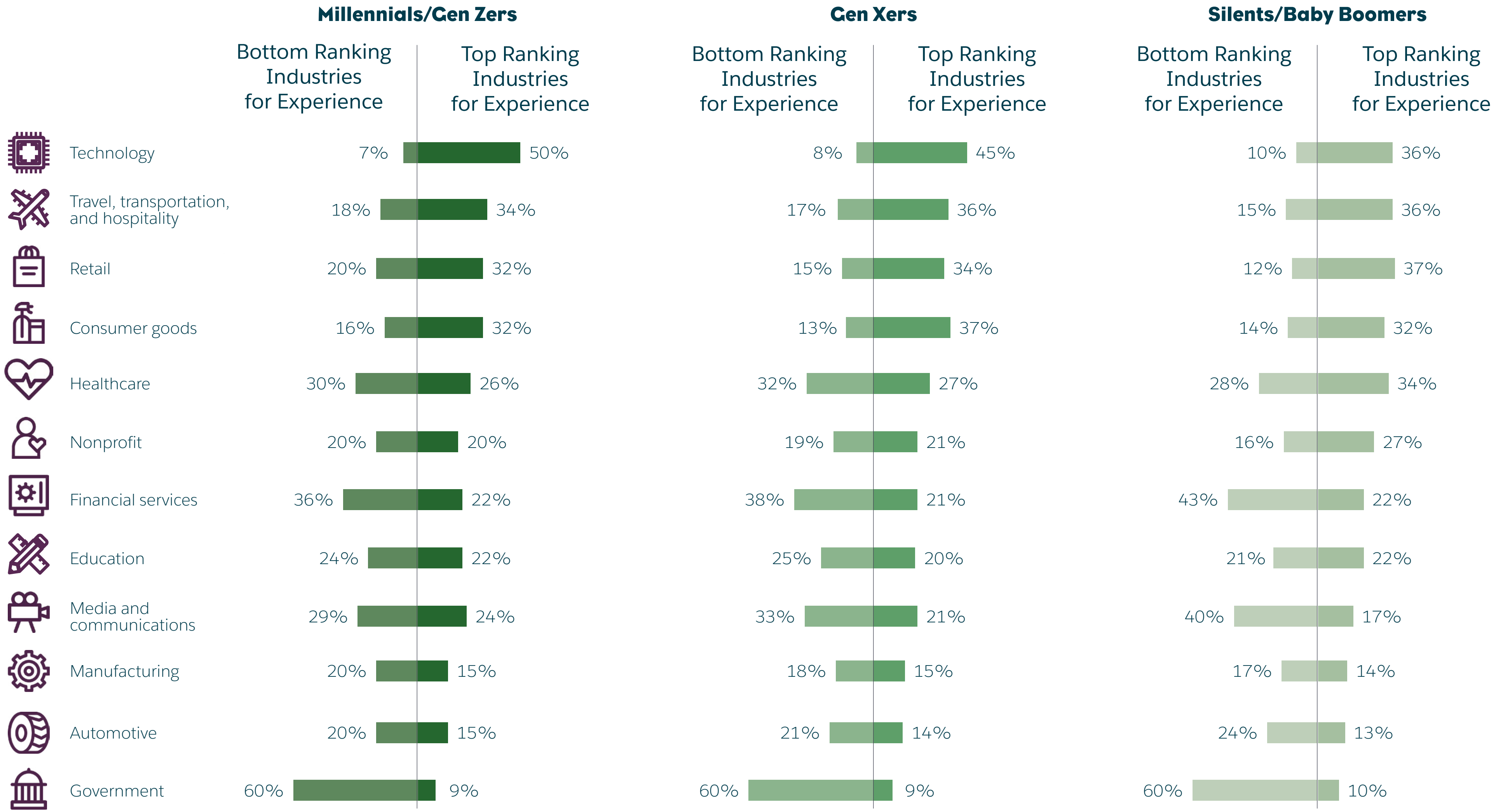
Corporate Values Sway Buying Decisions

Customers Who Say the Following, by Customer Type

Appendix

Last Look

Customer Industry Rankings for Experience, by Generation*



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* Respondents were asked to rank the top three and bottom three industries by experience.

Appendix

Last Look

Customer Industry Rankings for Experience, by Country*

🟦 Top 🟫 Bottom

Top and Bottom Ranking Industries for Experience

	Australia/ New Zealand		Canada		France		Germany		Hong Kong		India		Italy		Japan		Singapore		Spain		Switzerland		Thailand		United Kingdom/ Ireland		United States	
Technology	36%	10%	38%	8%	43%	5%	44%	7%	41%	8%	71%	6%	59%	4%	35%	7%	42%	12%	50%	6%	34%	16%	50%	7%	42%	8%	41%	9%
Travel, transportation, and hospitality	42%	17%	43%	14%	35%	13%	33%	15%	44%	14%	14%	24%	39%	12%	36%	10%	43%	19%	45%	9%	27%	20%	20%	37%	33%	22%	39%	14%
Retail	44%	14%	36%	17%	34%	16%	36%	10%	33%	20%	23%	25%	34%	11%	42%	11%	31%	23%	34%	7%	21%	24%	17%	26%	47%	14%	39%	14%
Consumer goods	40%	11%	39%	11%	29%	12%	40%	11%	39%	16%	27%	25%	34%	10%	18%	21%	35%	21%	29%	8%	28%	23%	34%	20%	36%	12%	37%	9%
Healthcare	30%	31%	24%	34%	37%	19%	20%	30%	24%	32%	28%	27%	15%	50%	41%	20%	31%	29%	36%	26%	30%	26%	33%	19%	32%	24%	23%	44%
Nonprofit	26%	14%	24%	15%	30%	13%	26%	17%	16%	25%	7%	32%	21%	15%	14%	26%	10%	24%	24%	17%	24%	21%	21%	22%	27%	12%	31%	12%
Financial services	13%	51%	29%	31%	13%	53%	13%	49%	40%	24%	27%	25%	14%	45%	22%	40%	31%	35%	11%	58%	24%	38%	27%	21%	20%	43%	21%	32%
Education	21%	15%	20%	19%	24%	21%	16%	34%	12%	33%	25%	28%	17%	36%	19%	31%	20%	14%	29%	21%	30%	17%	21%	31%	19%	16%	23%	17%
Media and communications	15%	39%	16%	36%	18%	42%	32%	20%	23%	30%	14%	29%	27%	28%	22%	46%	18%	27%	17%	43%	19%	30%	41%	17%	17%	41%	18%	34%
Manufacturing	13%	14%	11%	18%	14%	21%	13%	15%	10%	25%	25%	24%	17%	9%	24%	15%	10%	32%	13%	12%	22%	24%	13%	24%	10%	13%	13%	17%
Automotive	10%	22%	13%	29%	17%	23%	18%	26%	6%	15%	20%	20%	18%	14%	23%	10%	10%	29%	8%	15%	19%	28%	14%	15%	10%	27%	12%	25%
Government	10%	63%	7%	68%	7%	62%	8%	65%	11%	58%	17%	37%	6%	67%	6%	63%	19%	35%	4%	78%	21%	33%	9%	59%	7%	67%	4%	73%

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* Respondents were asked to rank the top three and bottom three industries by experience.

Survey Demographics

Survey Demographics

CUSTOMER TYPE

Business Buyers	28%
Consumers	72%

COMPANY SIZE

Small (1–100 employees)	35%
Medium (101–3,500 employees)	46%
Enterprise (3,501+ employees)	19%

GENERATION

Silents/Baby Boomers (born before 1965)	27%
Gen Xers (born 1965–1980)	30%
Millennials/Gen Zers (born 1981–2000)	42%

LEVEL OF EDUCATION

High school diploma or less	36%
Associate's degree	13%
Bachelor's degree or higher	52%

GENDER

Male	50%
Female	49%
Other	1%

COUNTRY

Australia/New Zealand	7%
Canada	7%
France	7%
Germany	7%
Hong Kong	7%
India	7%
Italy	7%
Japan	7%
Singapore	7%
Spain	7%
Switzerland	7%
Thailand	7%
United Kingdom/Ireland	7%
United States	13%

REGION

Europe	40%
Japan and Asia Pacific	40%
North America	20%

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