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Automated Customer Experience (CX):
Consumers' preferences and priorities

Final Research Results Presentation

PREPARED BY ESG FOR

aws

Agenda

- **Project Overview:** Objectives, next steps, methodology

- **Automated CX Interactions:** How common are these interactions, in what verticals do they occur, what actions are consumers completing with the help of automation

- **Automated CX Sentiment:** How do consumers prefer to interact with organizations, where do they perceive the strengths and weaknesses of automated CX, other customer care abouts

- **Additional CX Data:** Data underscoring the importance of exceptional CX

- **Who:** Respondent demographics/firmographics

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Objectives, Next Steps, and Methodology

> The focus of the study is to understand the top "care abouts" customers have when it comes to automated customer experiences (CX). Areas of focus for the research include:

- Customer preferences pivoting to automated CX (i.e., do customers prefer automated interactions, what use cases/interactions are top of mind)

- Reasons for these preferences if applicable (i.e., faster resolutions, 24x7 coverage, etc.)

- Perceived efficacy of the current generation of automated solutions, where and to what degree current solutions fall short of expectations

Next Steps

> Data will be used to increase the credibility of previously contracted ESG content. AWS to provide guidance on data to be highlighted within content.

Quantitative Web-Based Survey
- N=1,000 qualified completes
- Fielded in July 2022

Respondent Profile
- Individuals 18 years of age or older who have interacted with one or more brands' automated CX solutions in the last 12 months
- Even representation among male and female respondents
- Respondents by age: 18 to 35 (32%), 36 to 45 (34%), and over 45 (34%)
- Complete demographics included at end of presentation

AUTOMATED CX INTERACTIONS

HIGHLIGHTED FINDINGS - AUTOMATED CX INTERACTIONS

- › In the aggregate 44% of respondents believe they've interacted with an automated CX solution in the last 12 months (chatbot or IVR) – likely indicative of a combination of a less than saturated market and a propensity of some consumers to avoid automated interactions, but also some gaps in awareness

- › Web and mobile site chatbots lead in terms of channels engaged with, though the spread is relatively tight

- › Younger respondents, those with a higher HHI, and those that have more technology adoption affinity all consistently report higher engagement (a trend that permeates the data set)

- › Top verticals of engagement: Teclo, Finserv, Retail/eTail

- › Automated CX solutions are most frequently used in information gathering exercises; Tasks where the brand is implicitly or explicitly expected to take action are less often reported

Propensity to have interacted with an automated CX solution

Of respondents saying "no":
- 10% are early adopters when it comes to tech
- 15% are early majority
- 38% move with the masses
- 37% are in the late majority/are laggards

- 67% have an HHI <$75k
- 22% have an HHI of $75K to $149.9k
- 5% have an HHI of $150k or higher

Of respondents saying "yes":
- 39% are early adopters when it comes to tech
- 25% are early majority
- 26% move with the masses
- 10% are in the late majority/are laggards

- 46% have an HHI <$75k
- 35% have an HHI of $75K to $149.9k
- 17% have an HHI of $150k or higher

Yes, 44%

No, 56%
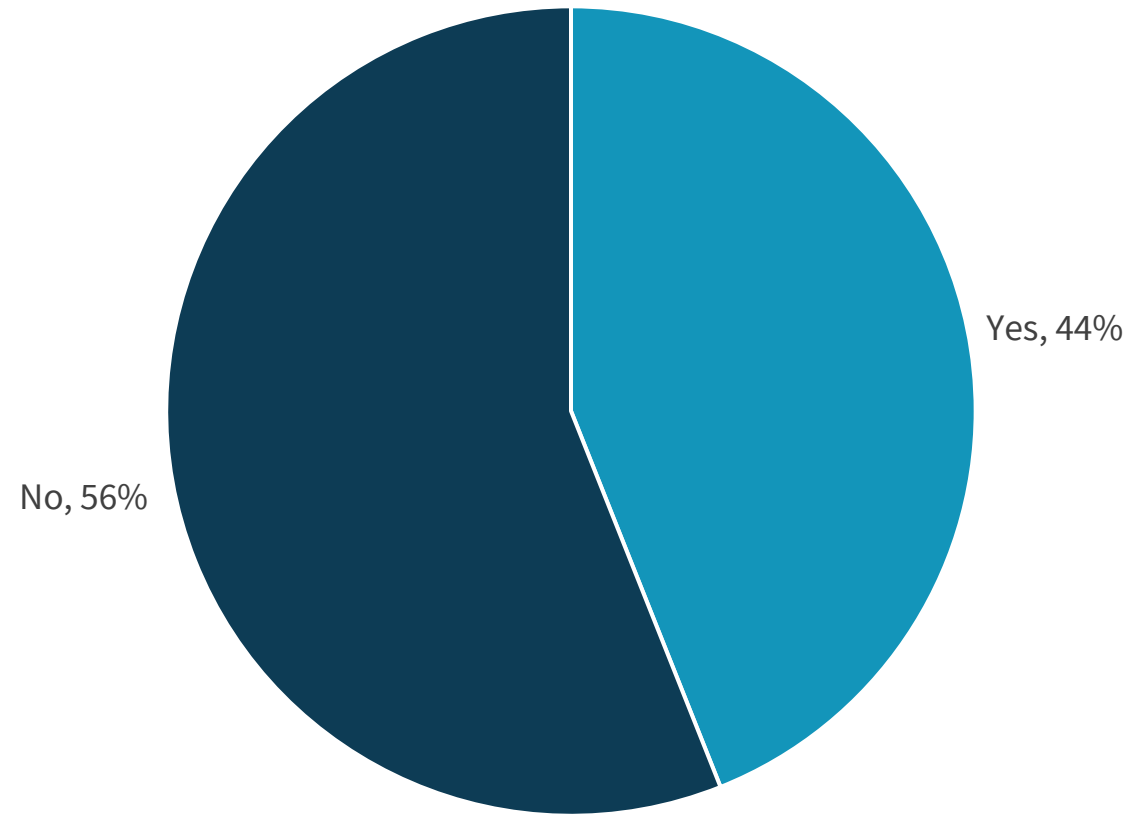
Question text: In the last 12 months, have you interacted with one or more brands' automated CX solutions? (Percent of respondents, N=2,274)

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Automated web or mobile chatbots are the most common automated CX solutions respondents have interacted with over the last 12 months

Higher income individuals ($150K or more) were more likely to interact with all of listed automated CX solutions than middle-income (75K to <150K) and lower income individuals (<75K).

Individuals with a high technology affinity were also more likely to utilize each channel.

Automated web or mobile chatbots (i.e., automated chat interfaces on a website or mobile app used to conduct an on-line chat conversation via text in lieu of communicating directly with a live human agent) — **63%**

Automated SMS/text chatbots (i.e., interactions via SMS/text messaging with an automated response, in lieu of communicating with a live human agent) — **56%**

Interactive Voice Response (i.e., automated phone system technology that allows callers to interact with a computer-operated phone system through the use of voice or keypad inputs) — **56%**

Automated messenger application chatbots (i.e., automated chat experiences within messenger applications like Facebook, WhatsApp, WeChat, or Line, in lieu of communicating directly with a live human agent) — **53%**

Question text: Thinking back over the last 12 months, which of the following automated CX solutions do you believe you have interacted with? (Percent of respondents, N=1,000, multiple responses accepted)

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Adults 35 and under were more likely than their older counterparts to have engaged with messenger and SMS/text bots
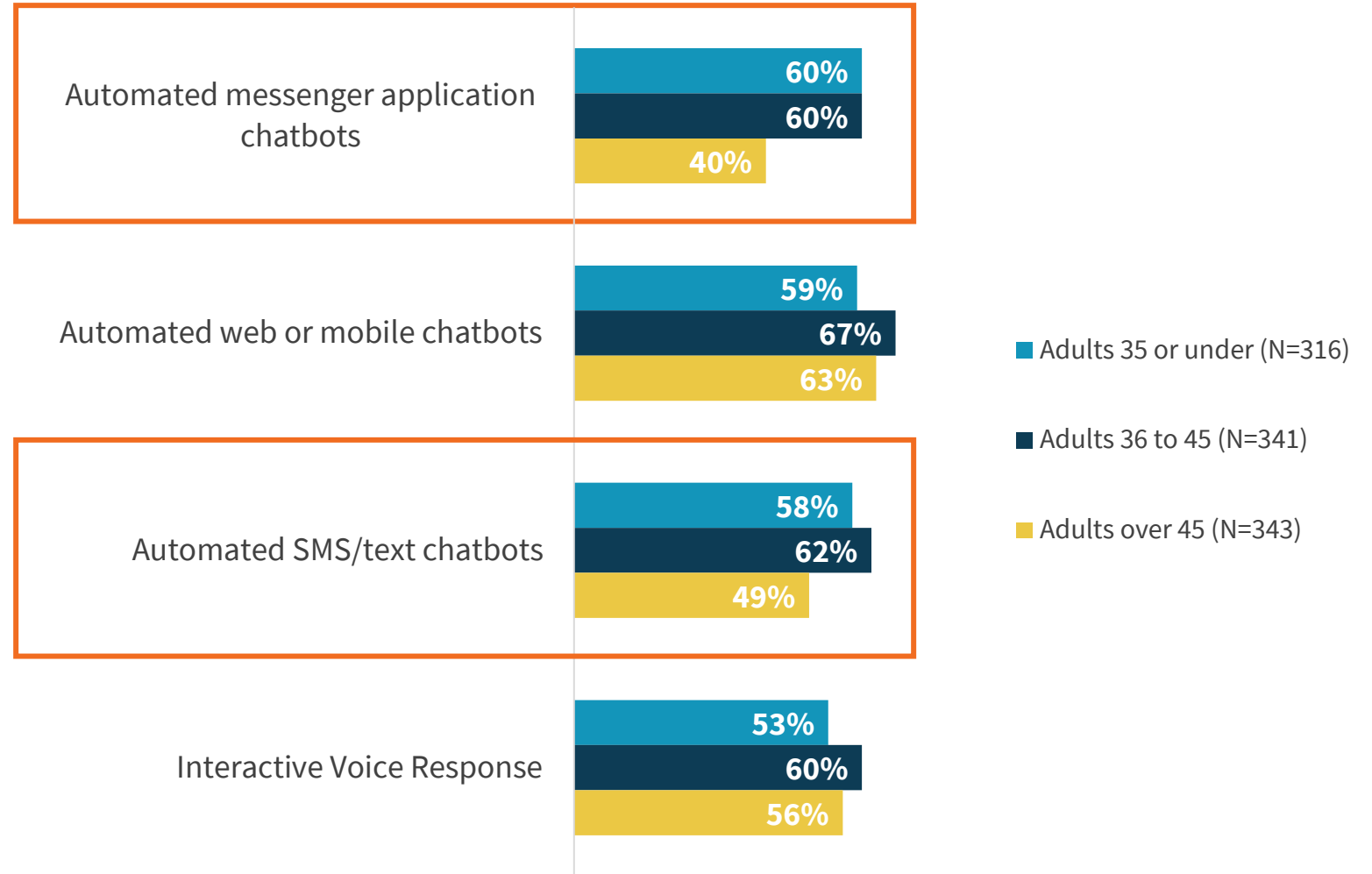
Automated messenger application chatbots
- Adults 35 or under: 60%
- Adults 36 to 45: 60%
- Adults over 45: 40%

Automated web or mobile chatbots
- Adults 35 or under: 59%
- Adults 36 to 45: 67%
- Adults over 45: 63%

Automated SMS/text chatbots
- Adults 35 or under: 58%
- Adults 36 to 45: 62%
- Adults over 45: 49%

Interactive Voice Response
- Adults 35 or under: 53%
- Adults 36 to 45: 60%
- Adults over 45: 56%

Legend:
- ■ Adults 35 or under (N=316)
- ■ Adults 36 to 45 (N=341)
- ■ Adults over 45 (N=343)

Question text: Thinking back over the last 12 months, which of the following automated CX solutions do you believe you have interacted with? (Percent of respondents, N=1,000, multiple responses accepted)

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Frequency of interacting with automated messenger app chatbots

~1 out of 3 respondents (32%) have interacted with an automated messenger chatbot solutions multiple times per month or more over the past 12 months.
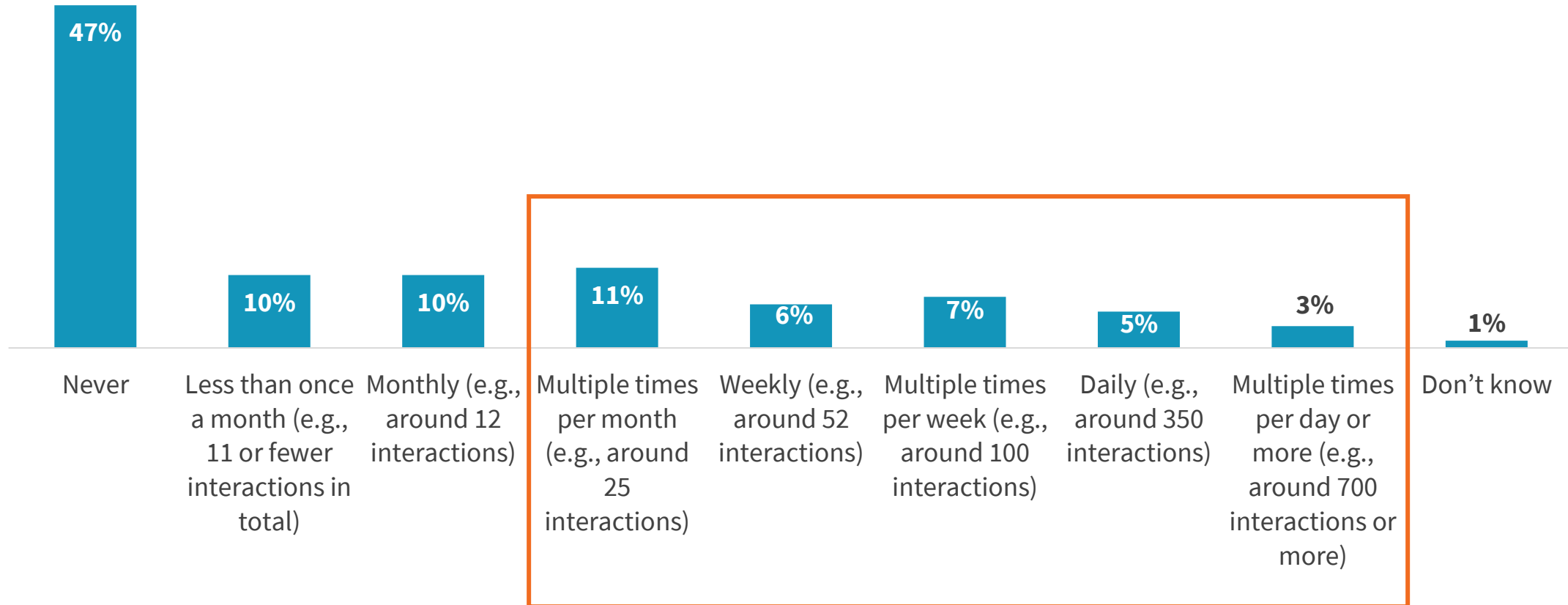
			Multiple times per month (e.g., around 25 interactions)	Weekly (e.g., around 52 interactions)	Multiple times per week (e.g., around 100 interactions)	Daily (e.g., around 350 interactions)	Multiple times per day or more (e.g., around 700 interactions or more)	
Never	Less than once a month (e.g., 11 or fewer interactions in total)	Monthly (e.g., around 12 interactions)						Don't know
47%	10%	10%	11%	6%	7%	5%	3%	1%

Question text: In total over the last 12 months, how often have you interacted with an automated messenger chatbot operated by any brand/organization? (Percent of respondents, N=1,000)

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Frequency of interacting with messenger chatbots among older respondents tends to be lower

■ Adults 35 or under (N=316)   ■ Adults 36 to 45 (N=341)   ■ Adults over 45 (N=343)
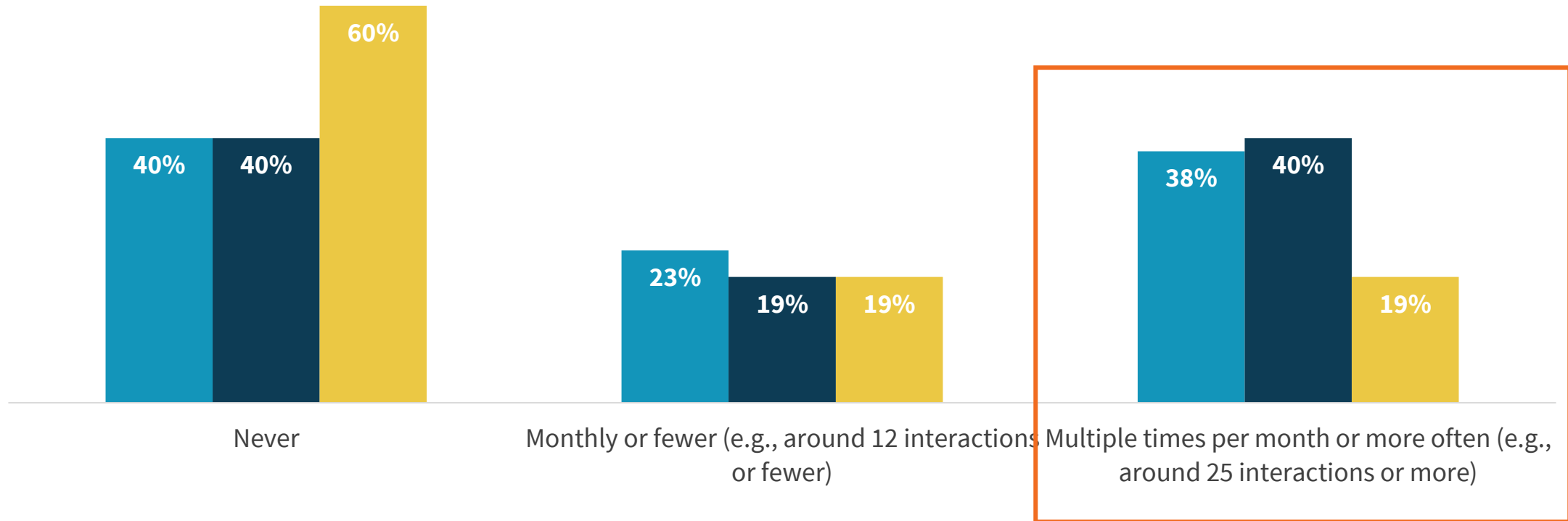
	Never	Monthly or fewer (e.g., around 12 interactions or fewer)	Multiple times per month or more often (e.g., around 25 interactions or more)
Adults 35 or under	40%	23%	38%
Adults 36 to 45	40%	19%	40%
Adults over 45	60%	19%	19%

Question text: In total over the last 12 months, how often have you interacted with an automated messenger chatbot operated by any brand/organization? (Percent of respondents)

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In terms of frequency of engagement, respondents report relative parity among channels included in the research

Automated web or mobile chatbot
- No usage: 37%
- Light usage: 31%
- Heavy usage: 32%

Automated text/SMS chatbot
- No usage: 44%
- Light usage: 25%
- Heavy usage: 31%

Automated messenger chatbot
- No usage: 47%
- Light usage: 20%
- Heavy usage: 32%

Interactive voice phone system
- No usage: 44%
- Light usage: 28%
- Heavy usage: 28%

Legend:
- No usage
- Light usage (less than once a month/monthly)
- Heavy usage (multiple times per month or more often)
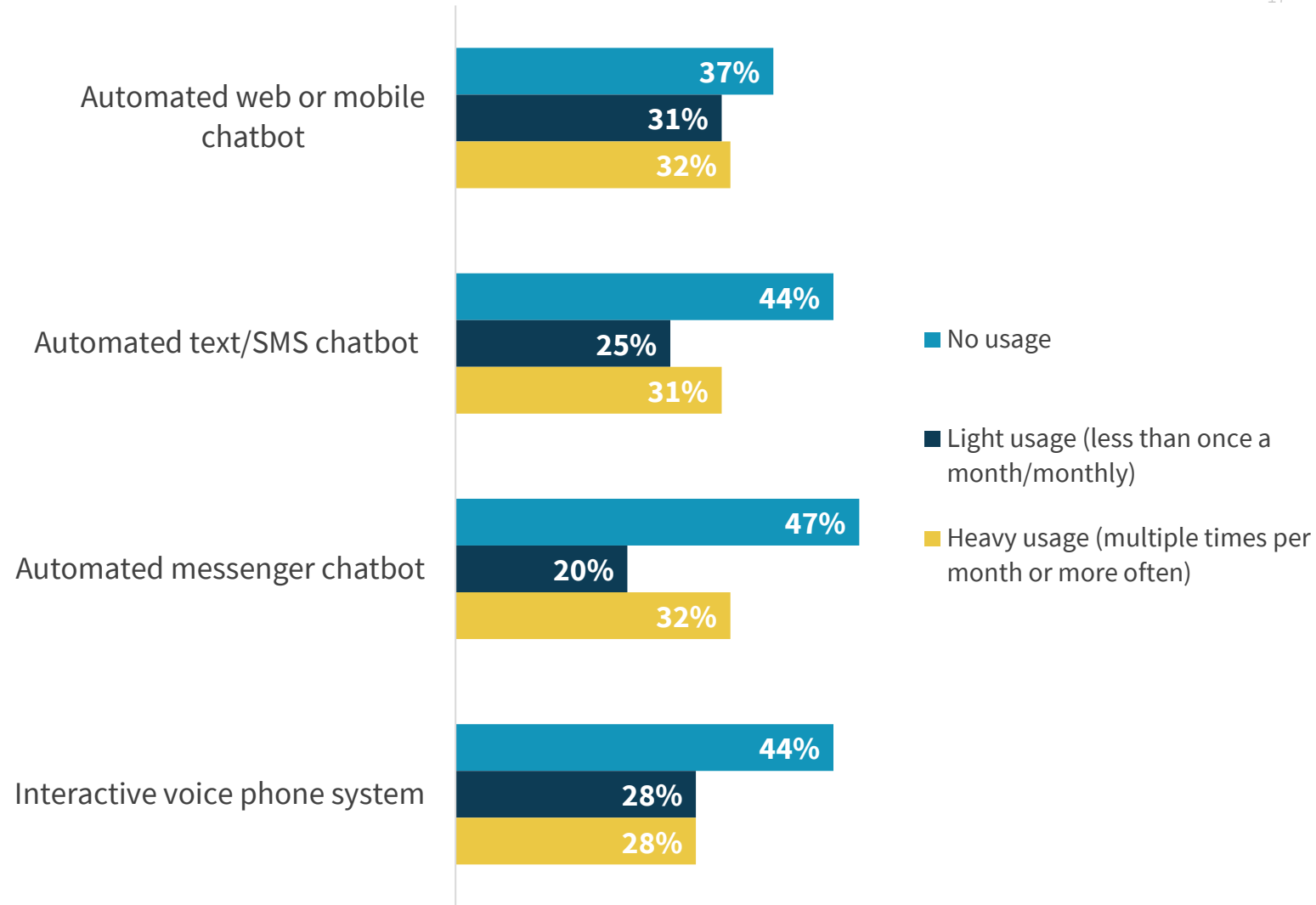
Question text: In total over the last 12 months, how often have you interacted with each automated CX channel operated by any brand/organization? (Percent of respondents, N=1,000)

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An automated chat window "pops up" or opens automatically, and disappears when you close it, 19%

An automated chat window "pops up" or opens automatically, and minimizes (but is still visible) when closed, 24%

You as a user must click to initiate an automated chat, 57%
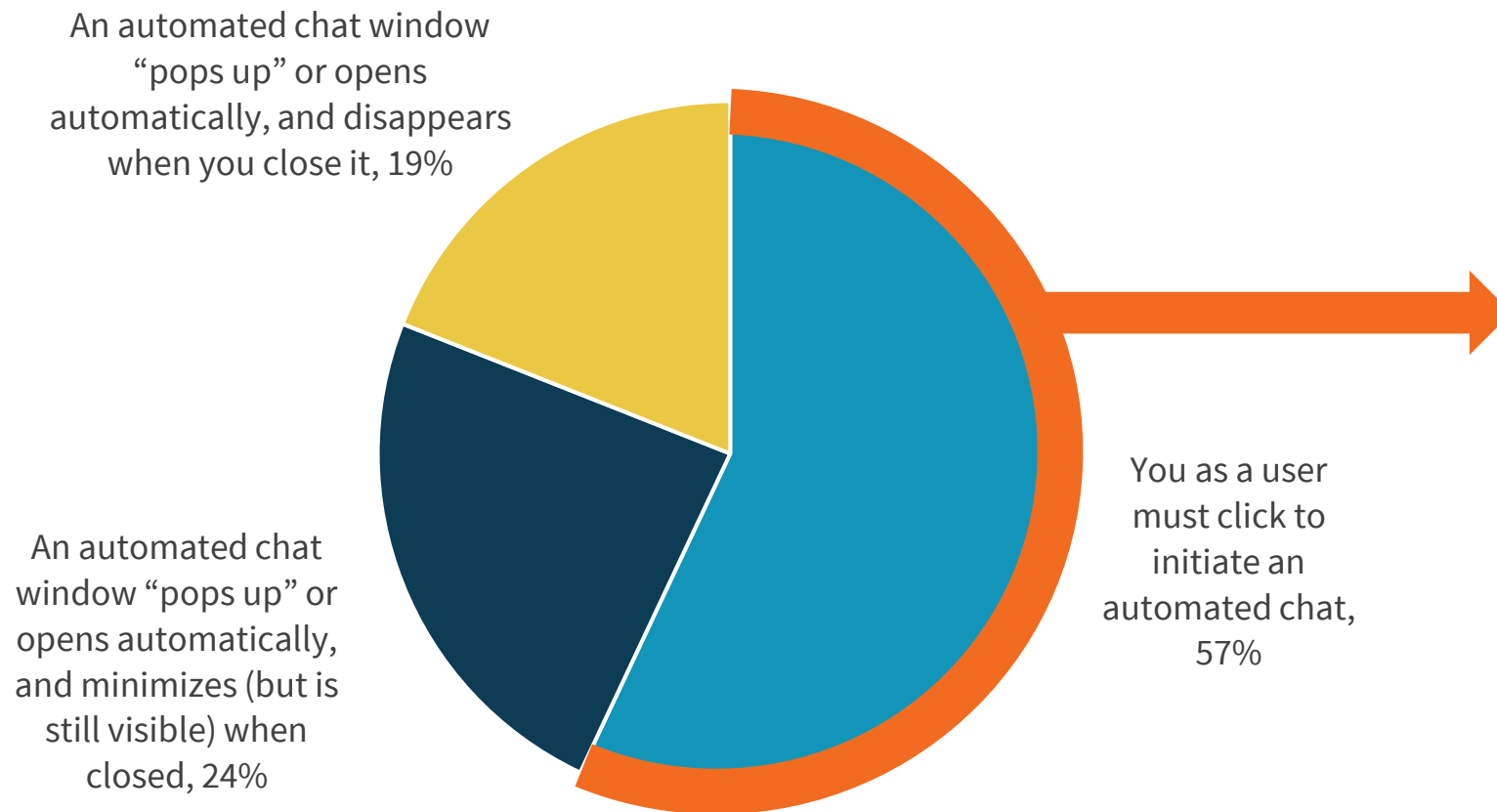
User preference likely runs counter to modes with higher engagement for site-based chatbots: 57% of respondents prefer to initiate contact

Question text: When on a brand's website or mobile application do you prefer it if… (Percent of respondents, N=629)

Not at all valuable, 2%

Not very valuable, 3%

Depends on the topic, 31%

Very valuable, 39%
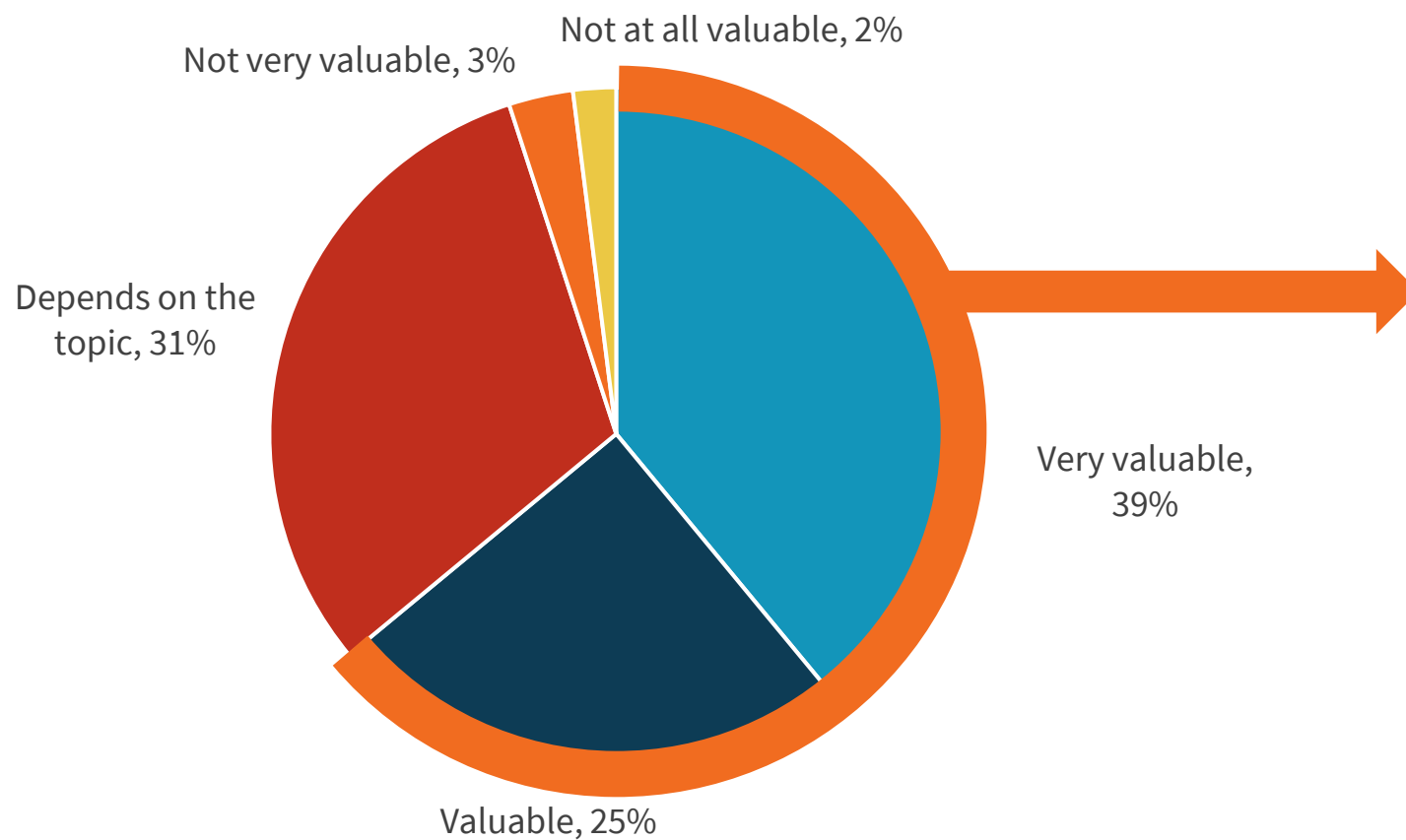
Valuable, 25%

Multimedia information delivered via chatbot is considered valuable by most respondents

64% of respondents that have interacted with an automated chatbots over the last 12 months say the delivery of multimedia (videos, images, etc.) in those engagements is valuable. Only 5% of these respondents find it not very/at all valuable.

Question text: When interacting with a brand's automated chatbot, how valuable/helpful to the experience is it to receive responses that include multimedia information (e.g., videos, images, etc.)? (Percent of respondents, N=629)

Younger respondents ascribe more value to multimedia resources in automated engagements
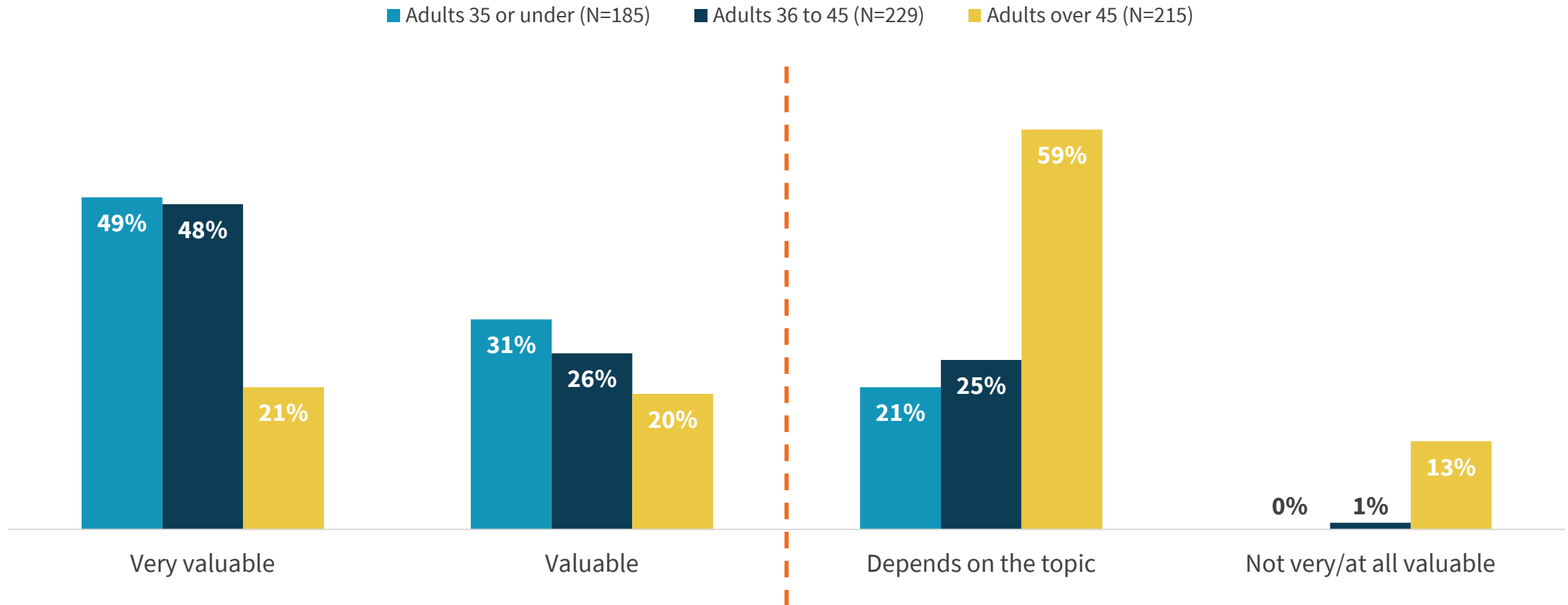
■ Adults 35 or under (N=185) ■ Adults 36 to 45 (N=229) ■ Adults over 45 (N=215)

Very valuable: 49%, 48%, 21%
Valuable: 31%, 26%, 20%
Depends on the topic: 21%, 25%, 59%
Not very/at all valuable: 0%, 1%, 13%

Question text: When interacting with a brand's automated chatbot, how valuable/helpful to the experience is it to receive responses that include multimedia information (e.g., videos, images, etc.)? (Percent of respondents)

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Verticals in which respondents have interacted with automated CX solutions
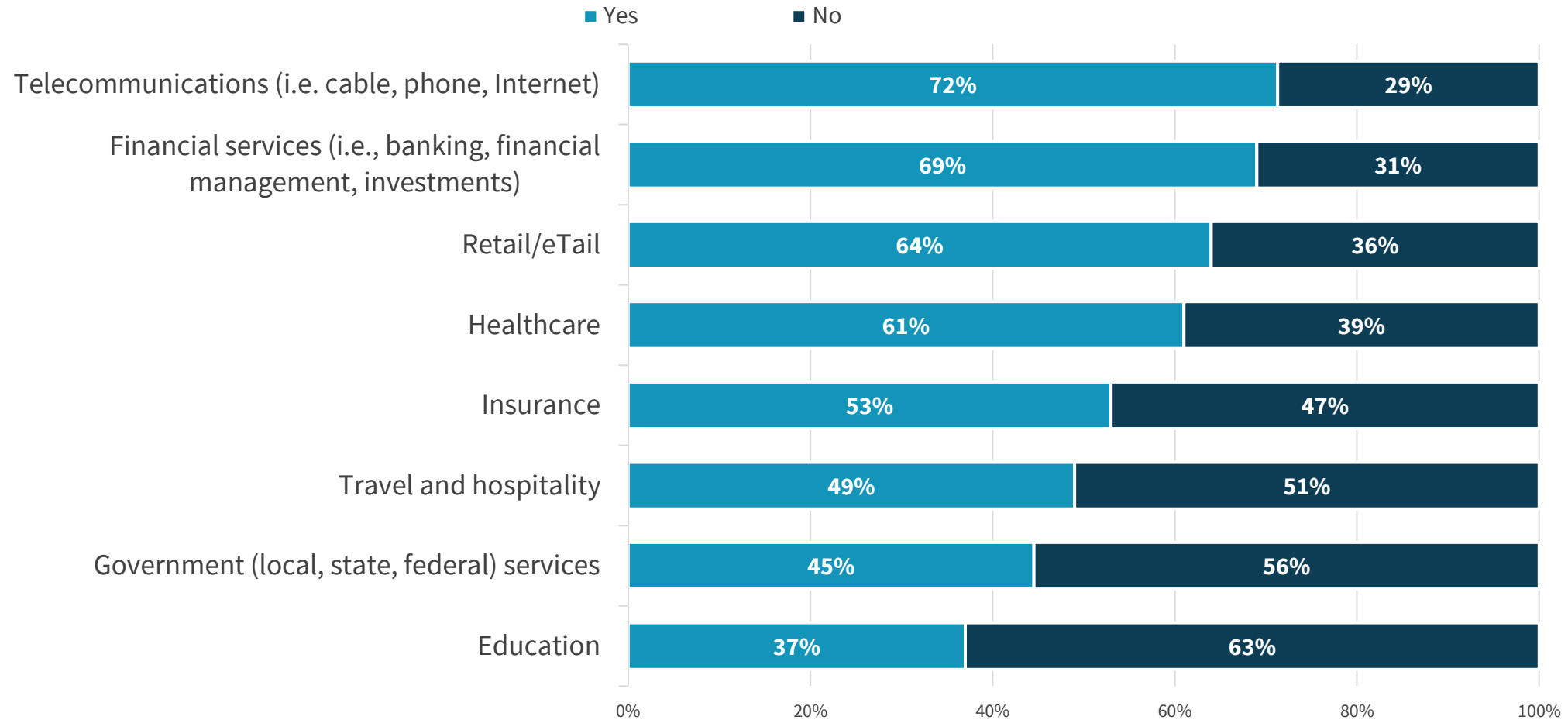
■ Yes   ■ No

Vertical	Yes	No
Telecommunications (i.e. cable, phone, Internet)	72%	29%
Financial services (i.e., banking, financial management, investments)	69%	31%
Retail/eTail	64%	36%
Healthcare	61%	39%
Insurance	53%	47%
Travel and hospitality	49%	51%
Government (local, state, federal) services	45%	56%
Education	37%	63%

Question text: Consider the following list of organization types. Have you interacted with any type of organization via an automated CX solution discussed in the previous questions in the last 12 months? (Percent of respondents, N=1,000)

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Older respondents were less likely to engage with automated CX solutions in each vertical included in the research
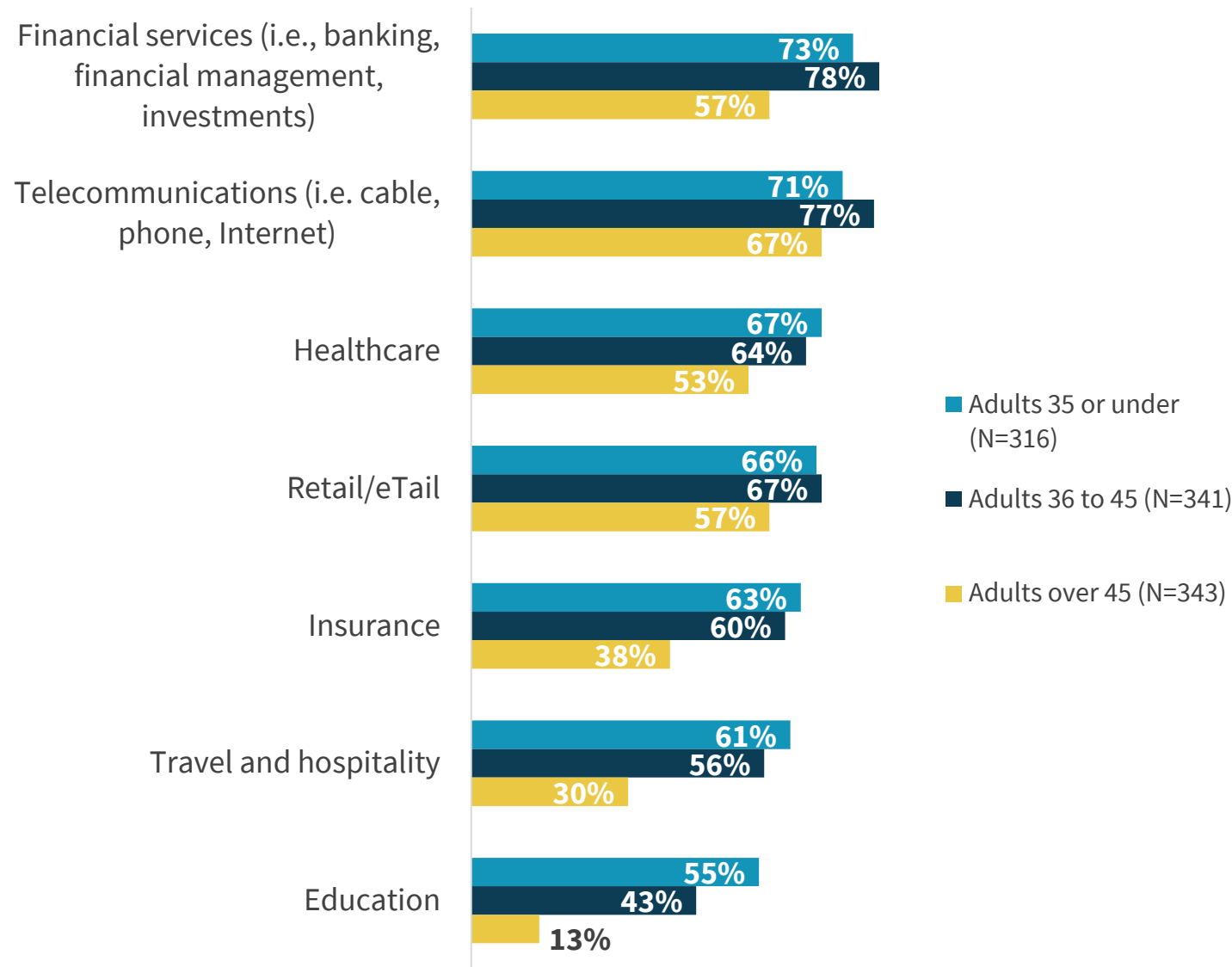
Financial services (i.e., banking, financial management, investments)
- 73%
- 78%
- 57%

Telecommunications (i.e. cable, phone, Internet)
- 71%
- 77%
- 67%

Healthcare
- 67%
- 64%
- 53%

Retail/eTail
- 66%
- 67%
- 57%

Insurance
- 63%
- 60%
- 38%

Travel and hospitality
- 61%
- 56%
- 30%

Education
- 55%
- 43%
- 13%

■ Adults 35 or under (N=316)

■ Adults 36 to 45 (N=341)

■ Adults over 45 (N=343)

Question text: Consider the following list of organization types. Have you interacted with any type of organization via an automated CX solution discussed in the previous questions in the last 12 months? (Percent of respondents selecting "Yes")

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Automated CX solutions are most frequently used in information gathering exercises

Tasks where the brand is implicitly or explicitly expected to take action (e.g., provide a diagnosis, freeze a card or account, unenroll a customer, execute an equity trade, etc.) are less often reported

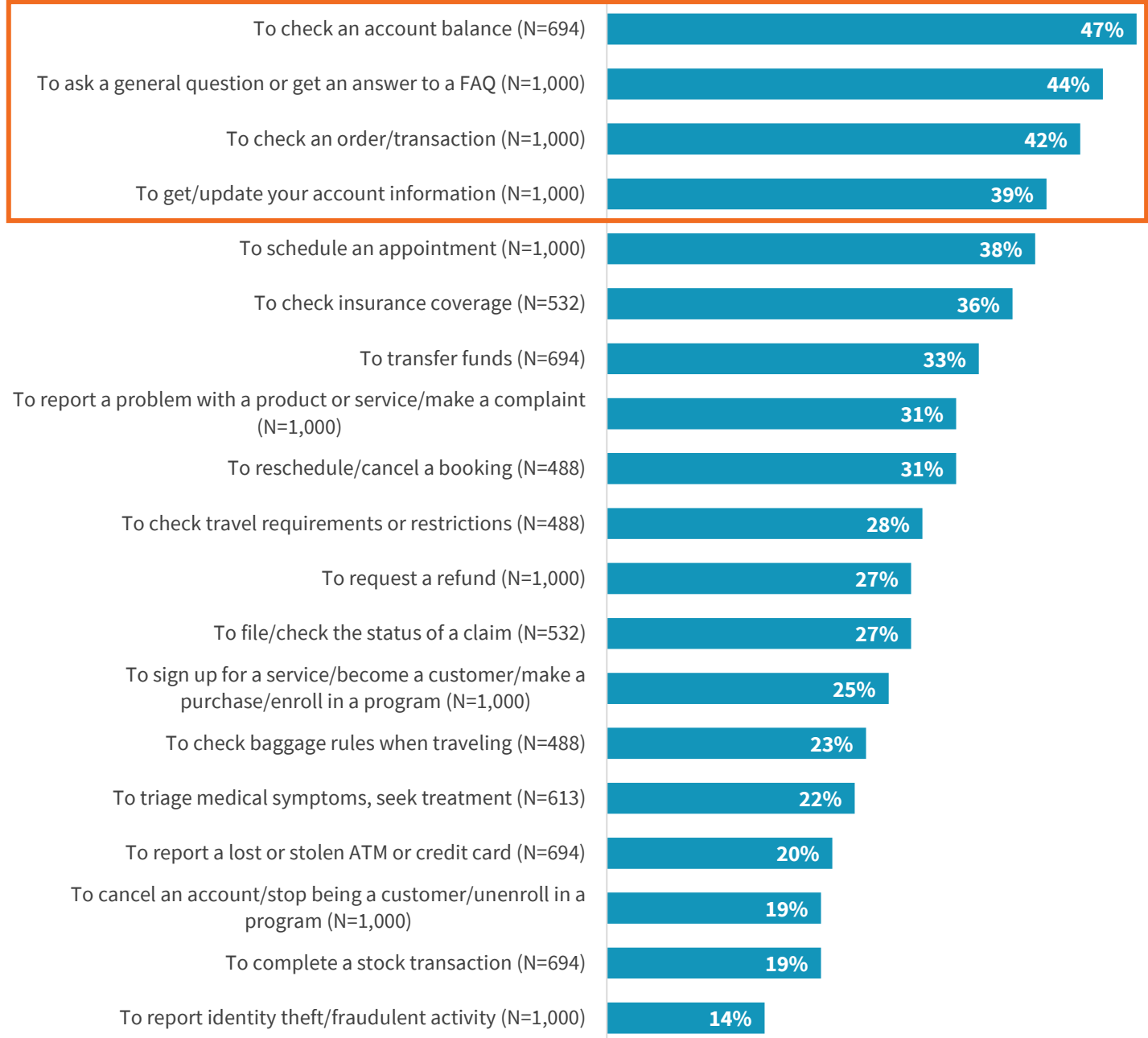|	
To check an account balance (N=694)	47%
To ask a general question or get an answer to a FAQ (N=1,000)	44%
To check an order/transaction (N=1,000)	42%
To get/update your account information (N=1,000)	39%
To schedule an appointment (N=1,000)	38%
To check insurance coverage (N=532)	36%
To transfer funds (N=694)	33%
To report a problem with a product or service/make a complaint (N=1,000)	31%
To reschedule/cancel a booking (N=488)	31%
To check travel requirements or restrictions (N=488)	28%
To request a refund (N=1,000)	27%
To file/check the status of a claim (N=532)	27%
To sign up for a service/become a customer/make a purchase/enroll in a program (N=1,000)	25%
To check baggage rules when traveling (N=488)	23%
To triage medical symptoms, seek treatment (N=613)	22%
To report a lost or stolen ATM or credit card (N=694)	20%
To cancel an account/stop being a customer/unenroll in a program (N=1,000)	19%
To complete a stock transaction (N=694)	19%
To report identity theft/fraudulent activity (N=1,000)	14%

Question text: In which of the following ways have you interacted with any brand's automated CX solution over the past 12 months? (Percent of respondents, N=1,000, multiple responses accepted)

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Web/mobile site chatbots are the most preferred automated CX solution from telcos

Web/mobile site chatbots are the most preferred automated CX solution by those under 35 and 36-45 years old (31% and 36%); Phone interactive voice response most preferred by those over 45 years old (37%).

Via web/mobile chatbot
- 44%
- 33%

Via phone interactive voice response
- 41%
- 30%

Via SMS/text chatbot
- 36%
- 20%

Via messenger chatbot
- 34%
- 17%

■ Telecommunications companies' automated CX interacted with over the last 12 months (N=715)

■ Preferred telecommunications companies' automated CX (N=715)
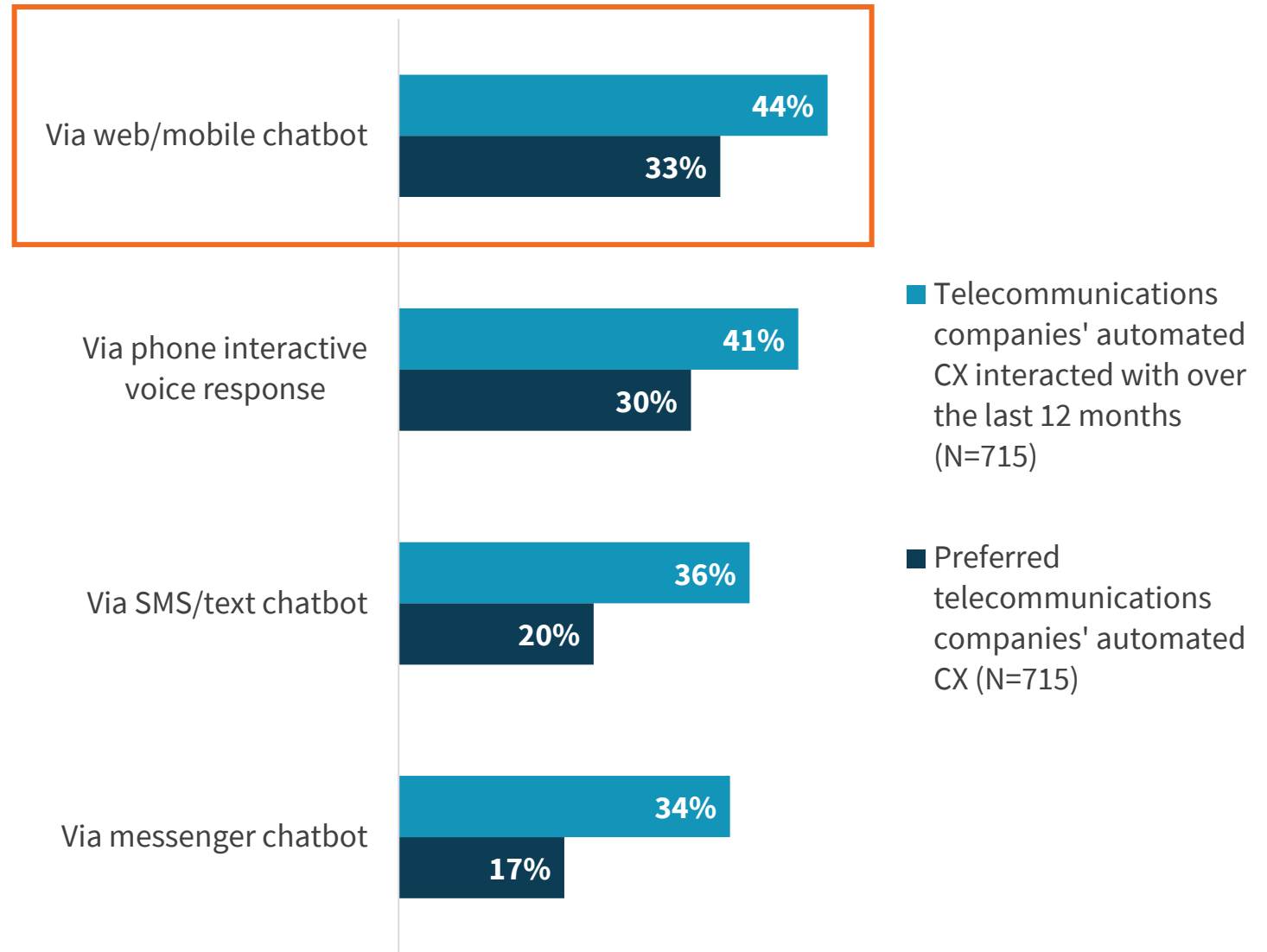
Question text: You mentioned you've interacted with telecommunications companies' automated CX solutions in the past 12 months. Which ones? (Percent of respondents, N=715, multiple responses accepted)
Regardless of use, which automated CX solution do you feel could give you the best experience or would you most prefer when dealing with telecommunications companies? (Percent of respondents, N=715)

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Respondents' willingness to interact with telco companies' automated CX solutions over the next 12 months

56% of respondents that have not interacted with an automated CX solution in the telco industry are interested in doing so over the next 12 months.

No, 29%

Yes, 72%

No, 44%

Yes, 56%

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AUTOMATED CX SENTIMENT

HIGHLIGHTED FINDINGS - AUTOMATED CX SENTIMENT

> What matters most in CX? Understanding of the ask and the accuracy of the response

> 51% of respondents prefer contact with a brand to be via an automated channel while 37% prefer to chat with a live agent – but differences by demographics persist

> In the aggregate, respondents have a definitive preference for automated CX in 6 of 9 cross-industry activities listed

> Automated text-based solutions outperform automated voice-based solutions significantly

> Improvements desired in automated CX channels are largely consistent across text- and voice-based solutions

> 83% of respondents report free-form speech and text is important in automated CX interactions

Respondents' view on the importance of attributes related to their interaction with an organization

Legend: ■ Critical ■ Important ■ Neutral ■ Not very important ■ Not at all important

Attribute	Critical	Important	Neutral	Not very important	Not at all important
Ability of the agent/automated solution to understand your request	48%	40%	9%	3%	1%
The accuracy and appropriateness of the response to your request	45%	44%	9%	2%	1%
Speed of resolution/getting an answer	36%	50%	11%	2%	1%
Ability to get an answer any time (e.g., 24x7x365 availability)	32%	50%	13%	4%	1%
The ability to escalate the issue	31%	48%	16%	3%	1%
The ability to communicate on a preferred channel (e.g., web/mobile chatbot, SMS, messenger, voice phone)	29%	54%	14%	3%	1%
Personalization (e.g., that the agent/automated solution knows who you are and the context of the issue)	25%	51%	18%	5%	1%
Empathy (e.g., feelings of trust in the brand imparted by the personality of the engagement)	24%	49%	21%	5%	1%
The tone and tenor of the engagement (e.g., that I personally enjoyed the interaction)	23%	50%	22%	4%	1%

Question text: When interacting with a brand (either with a live agent or an automated solution), how important are each of the following? (Percent of respondents, N=1,000)
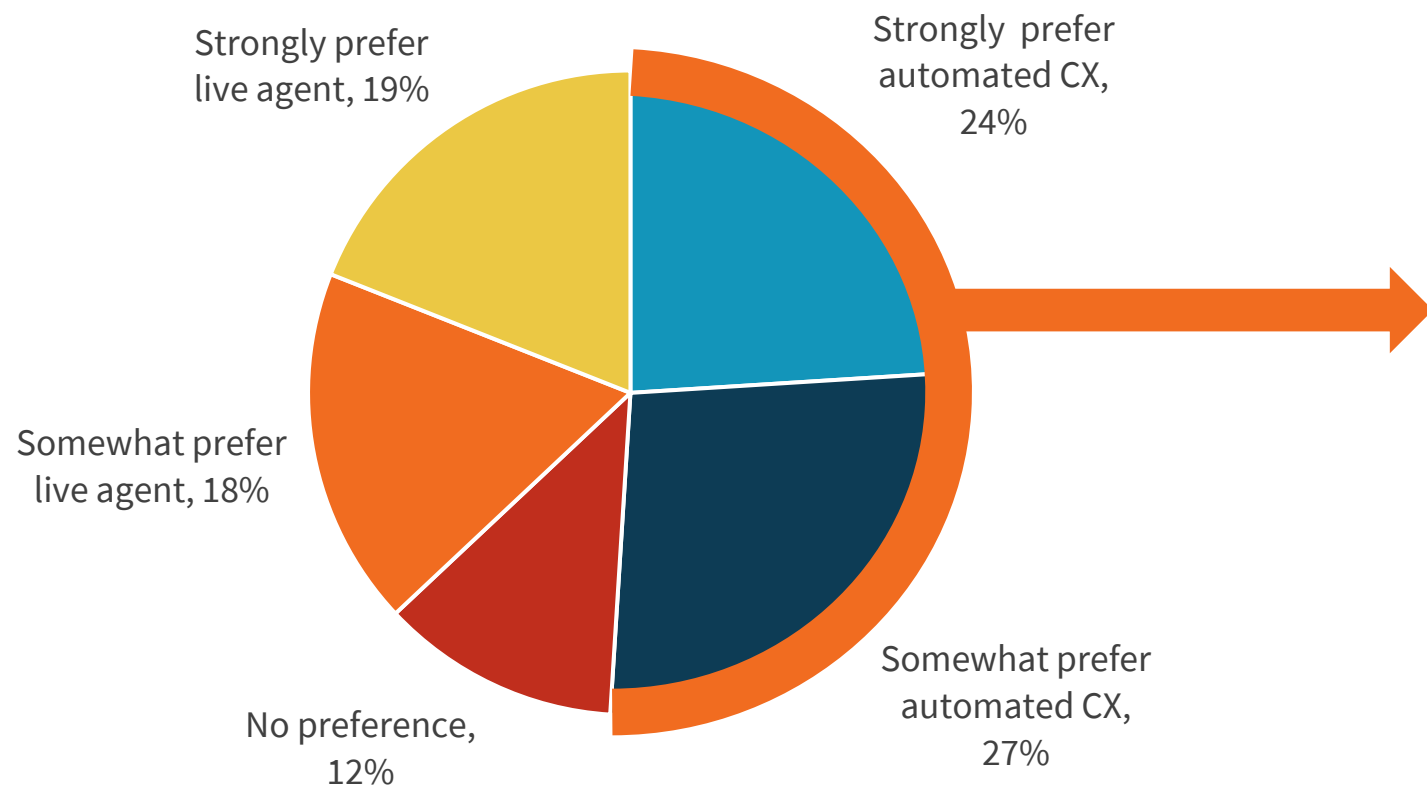
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Strongly prefer live agent, 19%

Strongly prefer automated CX, 24%

Somewhat prefer live agent, 18%

No preference, 12%

Somewhat prefer automated CX, 27%

51% of respondents prefer contact with a brand to be via an automated channel while 37% prefer to chat with a live agent

Question text: If you were going to reach out to a company or brand today, would you prefer to interact via an automated CX solution or to interact with a live agent? (Percent of respondents, N=1,000)

Younger respondents prefer initial contact with a brand to be automated by 3:1, older respondents prefer live agents to automated channels by nearly the same ratio
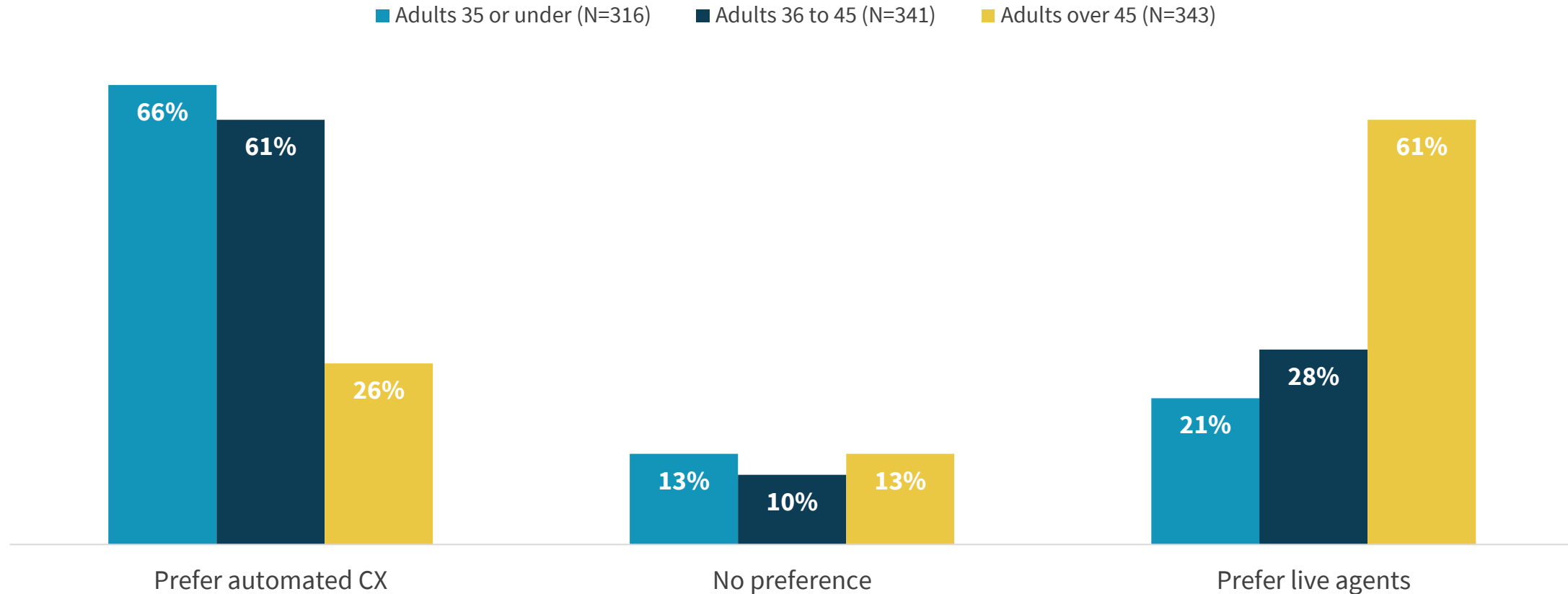
■ Adults 35 or under (N=316)   ■ Adults 36 to 45 (N=341)   ■ Adults over 45 (N=343)

	Prefer automated CX	No preference	Prefer live agents
Adults 35 or under	66%	13%	21%
Adults 36 to 45	61%	10%	28%
Adults over 45	26%	13%	61%

Question text: If you were going to reach out to a company or brand today, would you prefer to interact via an automated CX solution or to interact with a live agent? (Percent of respondents)

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Respondents have a definitive preference for automated CX in 6 of 9 cross-industry activities listed

■ Prefer automated CX interaction   ■ Prefer live agent interaction

Activity	Automated	Live	Ratio
To check an order/transaction	67%	20%	3.4x
To get/update your account information	63%	24%	2.6x
To ask a general question or get an answer to a FAQ	61%	25%	2.4x
To cancel an account/stop being a customer/unenroll in a program	57%	33%	1.7x
To schedule an appointment	56%	27%	2.1x
To sign up for a service/become a customer/make a purchase/enroll in a program	54%	32%	1.7x
To report a problem with a product or service/make a complaint	46%	43%	
To request a refund	46%	43%	
To report identity theft/fraudulent activity	39%	52%	

Question text: For each of the following activities would you prefer to interact with an automated CX solution or a live agent of a brand? (Percent of respondents, N=1,000)

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Automated CX solutions are seen as performing better than live agents across availability, communication via a preferred channel, and speed of resolution

In total, automated CX is preferred over live agents across 3 out of 9 functions and is seen as having parity with live agents across 4 additional functions.

■ Automated CX solutions better than Live agents   **■ Live agents better than automated CX solutions**

	Automated CX	Live agents	Ratio
Availability (e.g., 24x7x365 availability)	67%	19%	3.5x
The ability to communicate on a preferred channel (e.g., web/mobile chatbot, SMS, messenger, voice	55%	24%	2.3x
Speed of resolution	49%	34%	1.4x
The accuracy and appropriateness of the response to your request	43%	41%	
The ability to escalate the issue	42%	44%	
Personalization (e.g., that the agent/automated solution knows who you are and the context of the issue)	41%	41%	
The tone and tenor of the engagement (e.g., that I personally enjoyed the interaction)	41%	41%	
Ability to understand your request	39%	48%	
Empathy (e.g., feelings of trust in the brand imparted by the personality of the engagement)	39%	48%	

Question text: Regardless of importance to you, how would you compare automated solutions to live agents in terms of their ability to deliver each of the following? (Percent of respondents, N=1,000)

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Younger respondents are much more apt to feel automated CX solutions perform much better than live agents across the board

Availability
- Adults 35 or under: 41%
- Adults 36 to 45: 46%
- Adults over 45: 32%

The ability to escalate the issue
- Adults 35 or under: 33%
- Adults 36 to 45: 25%
- Adults over 45: 9%

The ability to communicate on a preferred channel
- Adults 35 or under: 33%
- Adults 36 to 45: 33%
- Adults over 45: 13%

Speed of resolution
- Adults 35 or under: 31%
- Adults 36 to 45: 30%
- Adults over 45: 14%

Personalization
- Adults 35 or under: 31%
- Adults 36 to 45: 26%
- Adults over 45: 7%

The accuracy and appropriateness of the response to your request
- Adults 35 or under: 28%
- Adults 36 to 45: 27%
- Adults over 45: 11%

Empathy
- Adults 35 or under: 28%
- Adults 36 to 45: 24%
- Adults over 45: 8%

Ability to understand your request
- Adults 35 or under: 25%
- Adults 36 to 45: 26%
- Adults over 45: 9%

The tone and tenor of the engagement
- Adults 35 or under: 24%
- Adults 36 to 45: 22%
- Adults over 45: 6%

Legend:
- Adults 35 or under (N=316)
- Adults 36 to 45 (N=341)
- Adults over 45 (N=343)

Question text: Regardless of importance to you, how would you compare automated solutions to live agents in terms of their ability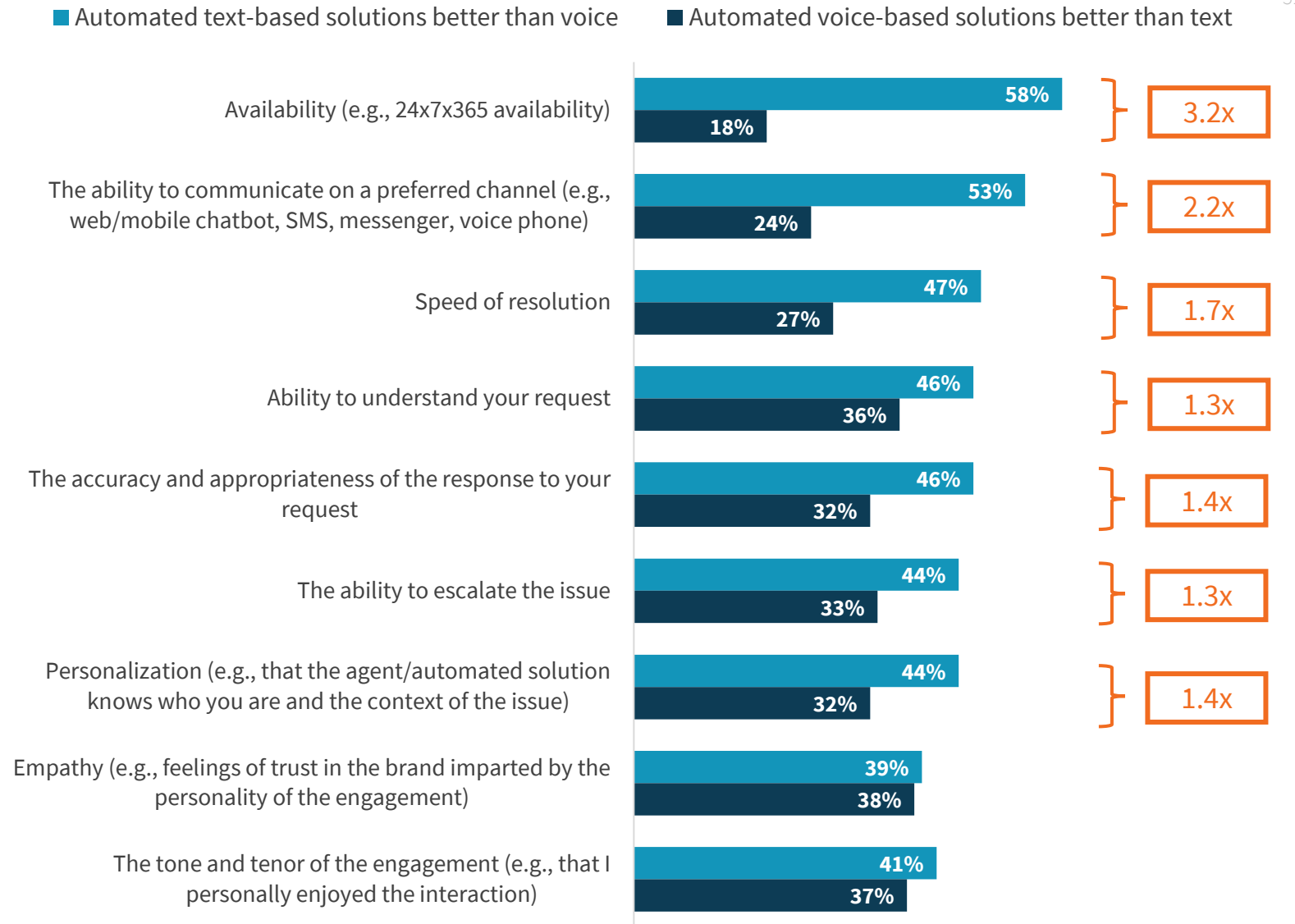 to deliver each of the following? (Percent of respondents reporting automated CX performs "much better" than live agents)

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Automated text-based solutions outperform automated voice-based solutions significantly across many attributes
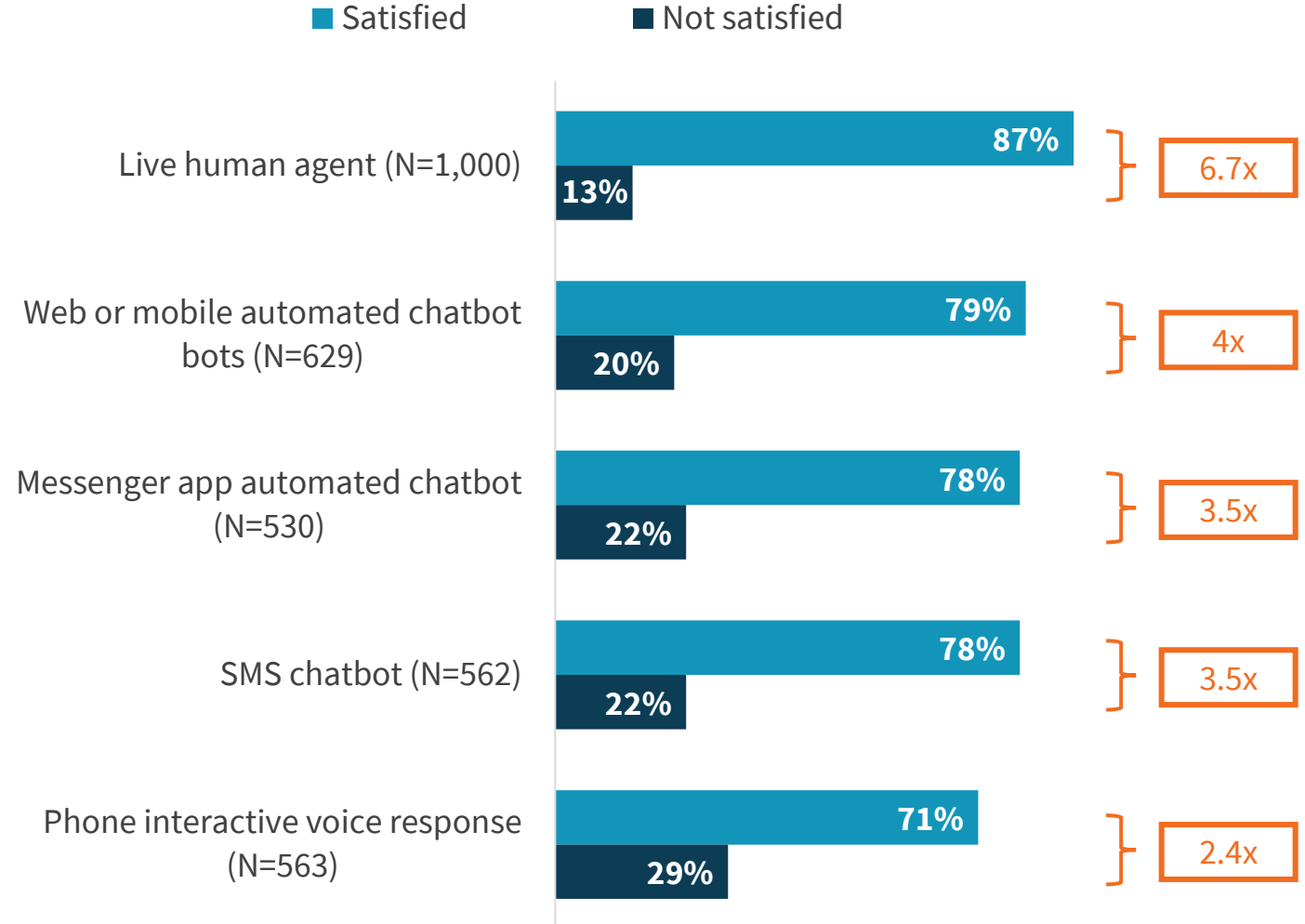
Younger, more affluent, and respondents with an affinity for technology favor text-based solutions. Older respondents and those less enthusiastically adopting technology have a preference for IVR

■ Automated text-based solutions better than voice   ■ Automated voice-based solutions better than text

Attribute	Text %	Voice %	Ratio
Availability (e.g., 24x7x365 availability)	58%	18%	3.2x
The ability to communicate on a preferred channel (e.g., web/mobile chatbot, SMS, messenger, voice phone)	53%	24%	2.2x
Speed of resolution	47%	27%	1.7x
Ability to understand your request	46%	36%	1.3x
The accuracy and appropriateness of the response to your request	46%	32%	1.4x
The ability to escalate the issue	44%	33%	1.3x
Personalization (e.g., that the agent/automated solution knows who you are and the context of the issue)	44%	32%	1.4x
Empathy (e.g., feelings of trust in the brand imparted by the personality of the engagement)	39%	38%	
The tone and tenor of the engagement (e.g., that I personally enjoyed the interaction)	41%	37%	

Question text: Regardless of importance to you, how would you compare text-based automated solutions (e.g., web, mobile, SMS, or messenger chatbots) to voice based automated solutions (e.g., phone interactive voice response) in terms of their ability to deliver each of the following? (Percent of respondents, N=1,000)
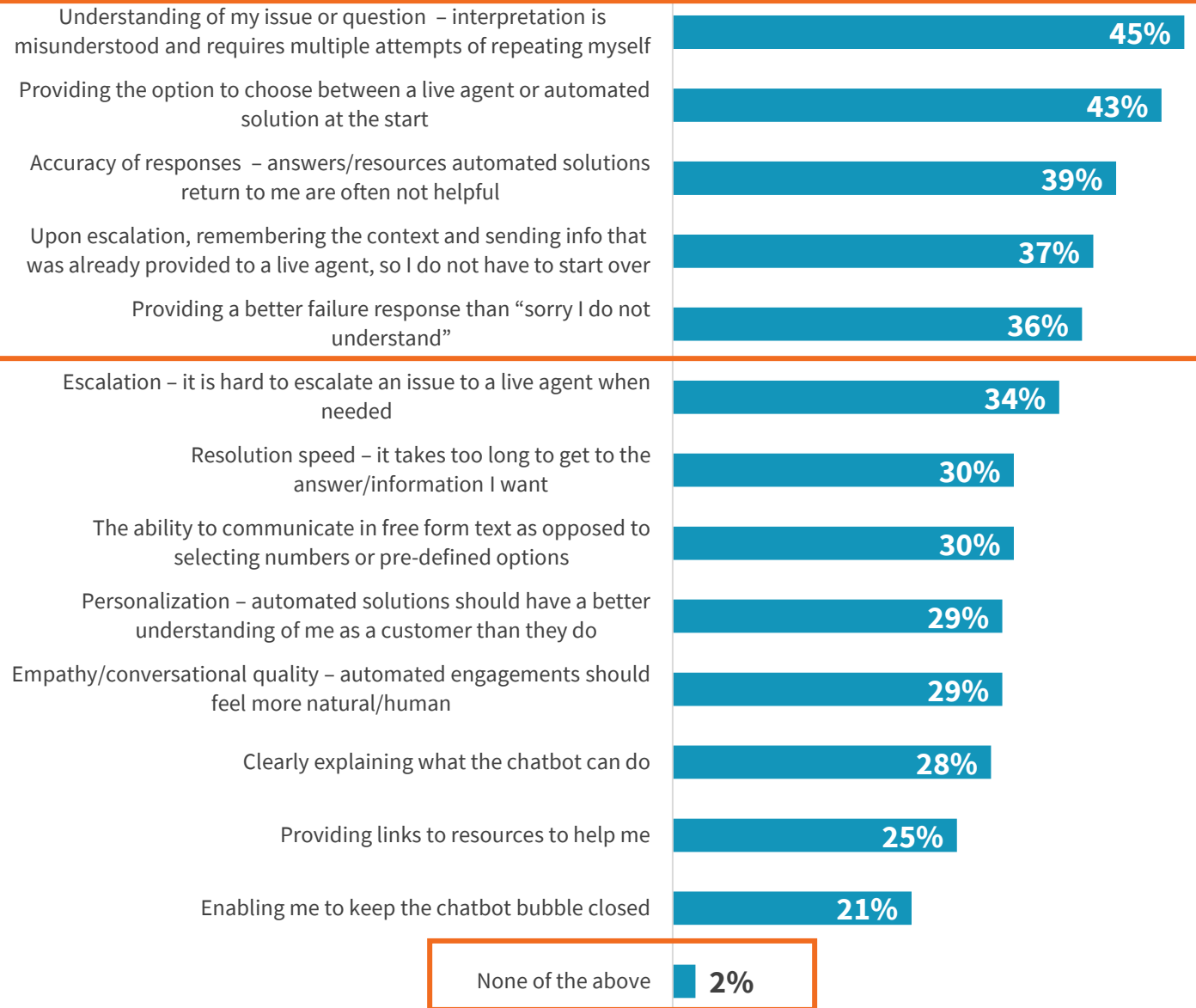
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While general trends point to a preference for automated solutions, satisfaction has tended to be higher when engaging with live agents, pointing to a need for improvement in automated solutions

Older adults reported the least satisfaction: On average, 20% of older adults reported to be completely satisfied across automated CX solutions (web, messenger, SMSs and phone) compared to 43% of middle-aged adults and 43% of younger adults.

■ Satisfied   ■ Not satisfied

Live human agent (N=1,000)
87%
13%
6.7x

Web or mobile automated chatbot bots (N=629)
79%
20%
4x

Messenger app automated chatbot (N=530)
78%
22%
3.5x

SMS chatbot (N=562)
78%
22%
3.5x

Phone interactive voice response (N=563)
71%
29%
2.4x

Question text: Think of the last time you interacted with a brand via the following methods, overall, how satisfied were you with that interaction: (Percent of respondents, N=629)
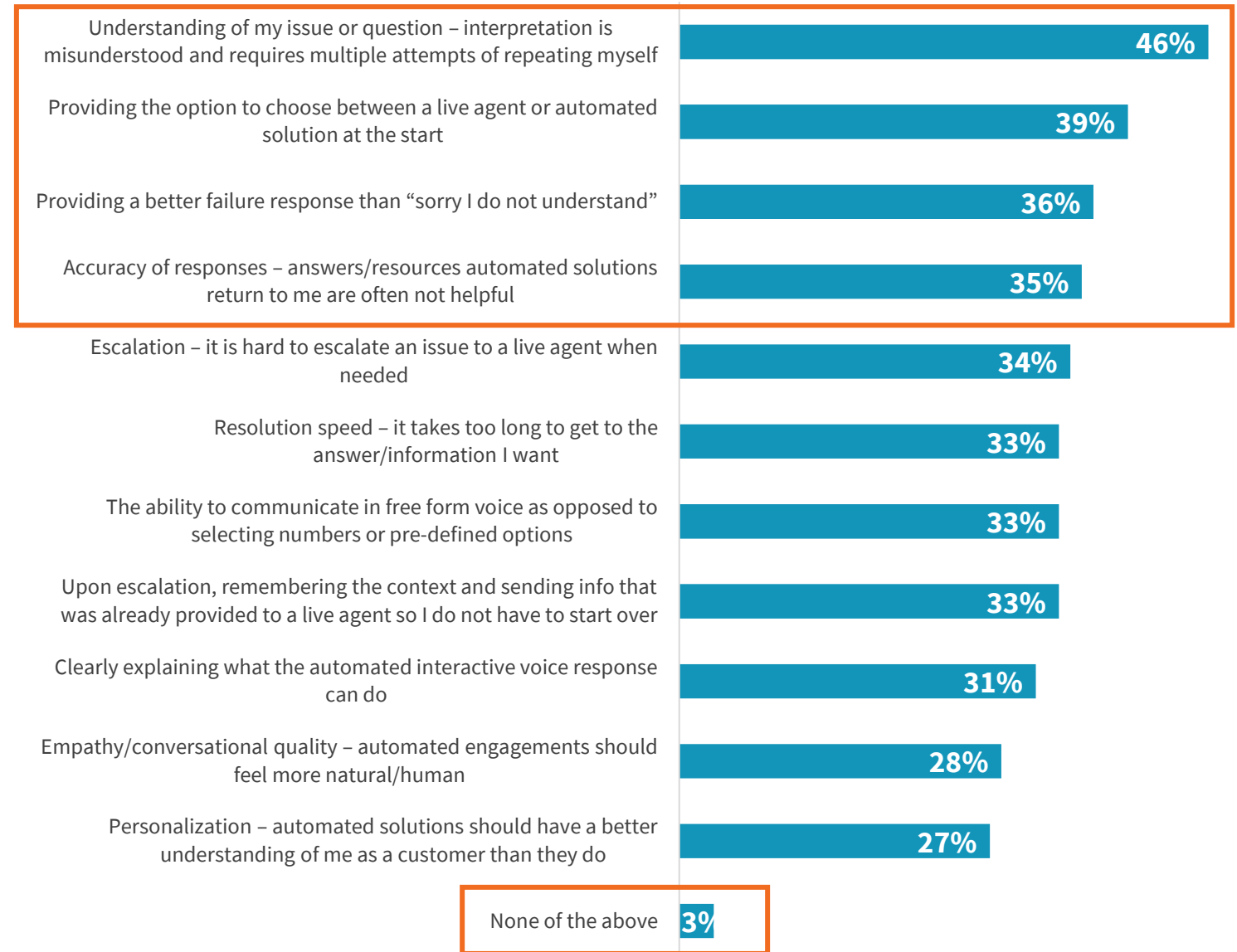
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Where automated, text-based CX solutions are most often seen as having room to improve

Understanding of my issue or question – interpretation is misunderstood and requires multiple attempts of repeating myself **45%**

Providing the option to choose between a live agent or automated solution at the start **43%**

Accuracy of responses – answers/resources automated solutions return to me are often not helpful **39%**

Upon escalation, remembering the context and sending info that was already provided to a live agent, so I do not have to start over **37%**

Providing a better failure response than "sorry I do not understand" **36%**

Escalation – it is hard to escalate an issue to a live agent when needed **34%**

Resolution speed – it takes too long to get to the answer/information I want **30%**

The ability to communicate in free form text as opposed to selecting numbers or pre-defined options **30%**

Personalization – automated solutions should have a better understanding of me as a customer than they do **29%**

Empathy/conversational quality – automated engagements should feel more natural/human **29%**

Clearly explaining what the chatbot can do **28%**

Providing links to resources to help me **25%**

Enabling me to keep the chatbot bubble closed **21%**
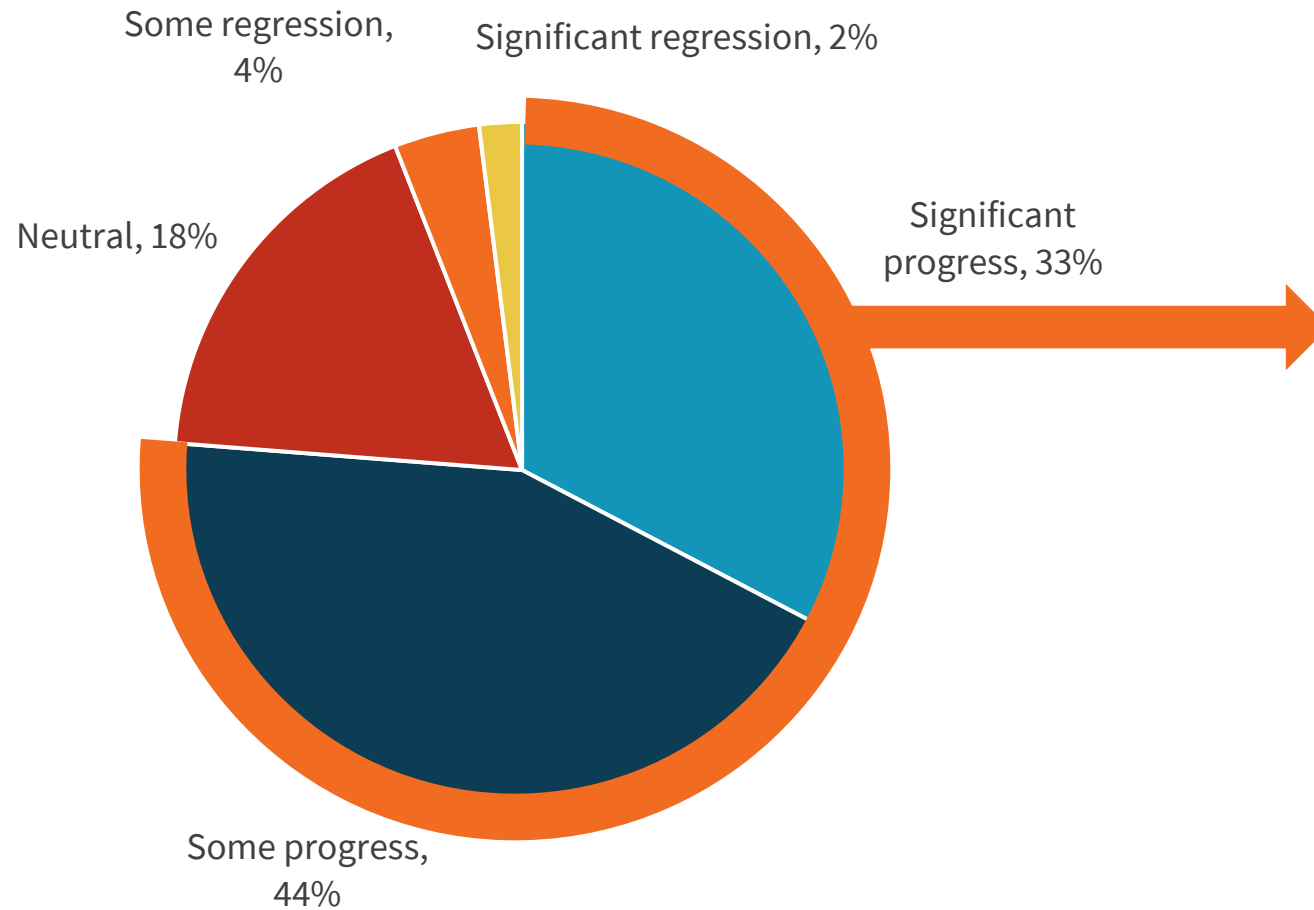
None of the above **2%**

Question text: Regardless of their comparative standing to live agents, in which of the following areas do you think automated, text-based CX solutions (e.g., web, mobile, SMS, messenger chatbots) have the most room to improve? (Percent of respondents, N=1,000, multiple responses accepted)

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Where automated, IVR CX solutions are most often seen as having room to improve

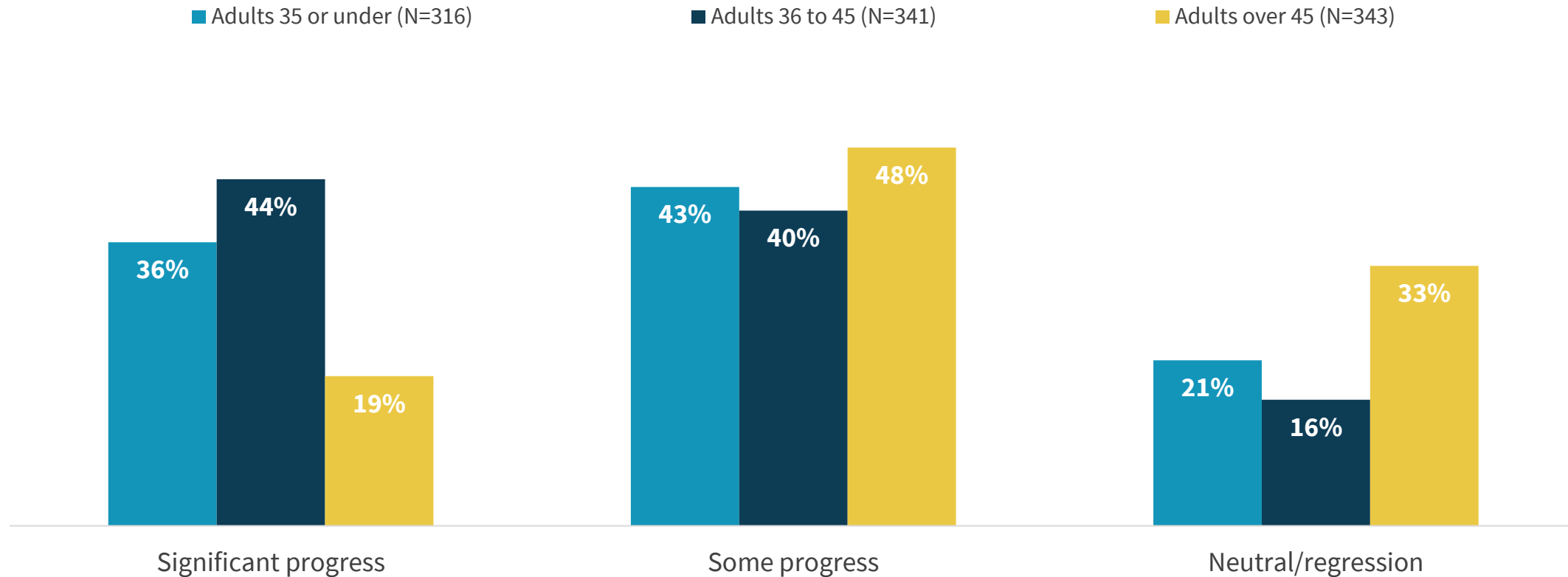IVR solutions share four of the same top areas of improvement with text-based solutions

Understanding of my issue or question – interpretation is misunderstood and requires multiple attempts of repeating myself **46%**

Providing the option to choose between a live agent or automated solution at the start **39%**

Providing a better failure response than "sorry I do not understand" **36%**

Accuracy of responses – answers/resources automated solutions return to me are often not helpful **35%**

Escalation – it is hard to escalate an issue to a live agent when needed **34%**

Resolution speed – it takes too long to get to the answer/information I want **33%**

The ability to communicate in free form voice as opposed to selecting numbers or pre-defined options **33%**

Upon escalation, remembering the context and sending info that was already provided to a live agent so I do not have to start over **33%**

Clearly explaining what the automated interactive voice response can do **31%**

Empathy/conversational quality – automated engagements should feel more natural/human **28%**

Personalization – automated solutions should have a better understanding of me as a customer than they do **27%**

None of the above **3%**

Question text: Regardless of their comparative standing to live agents, in which of the following areas do you think automated, voice-based CX solutions (e.g., phone interactive voice response) have the most room to improve? (Percent of respondents, N=1,000, multiple responses accepted)

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Some regression, 4%

Significant regression, 2%

Neutral, 18%

Significant progress, 33%

Some progress, 44%

77% of respondents feel the quality of automated CX interactions have progressed over the last 2 years

Question text: Compared to two years ago, how much progress have you observed in the quality of interaction provided by today's automated CX solutions? (Percent of respondents, N=1,000)

Younger respondents are more likely to perceive the quality of CX solutions interactions as improving (relative to the past)

■ Adults 35 or under (N=316)   ■ Adults 36 to 45 (N=341)   ■ Adults over 45 (N=343)

Significant progress
- 36%
- 44%
- 19%

Some progress
- 43%
- 40%
- 48%

Neutral/regression
- 21%
- 16%
- 33%

Question text: Compared to two years ago, how much progress have you observed in the quality of interaction provided by today's automated CX solutions? (Percent of respondents)

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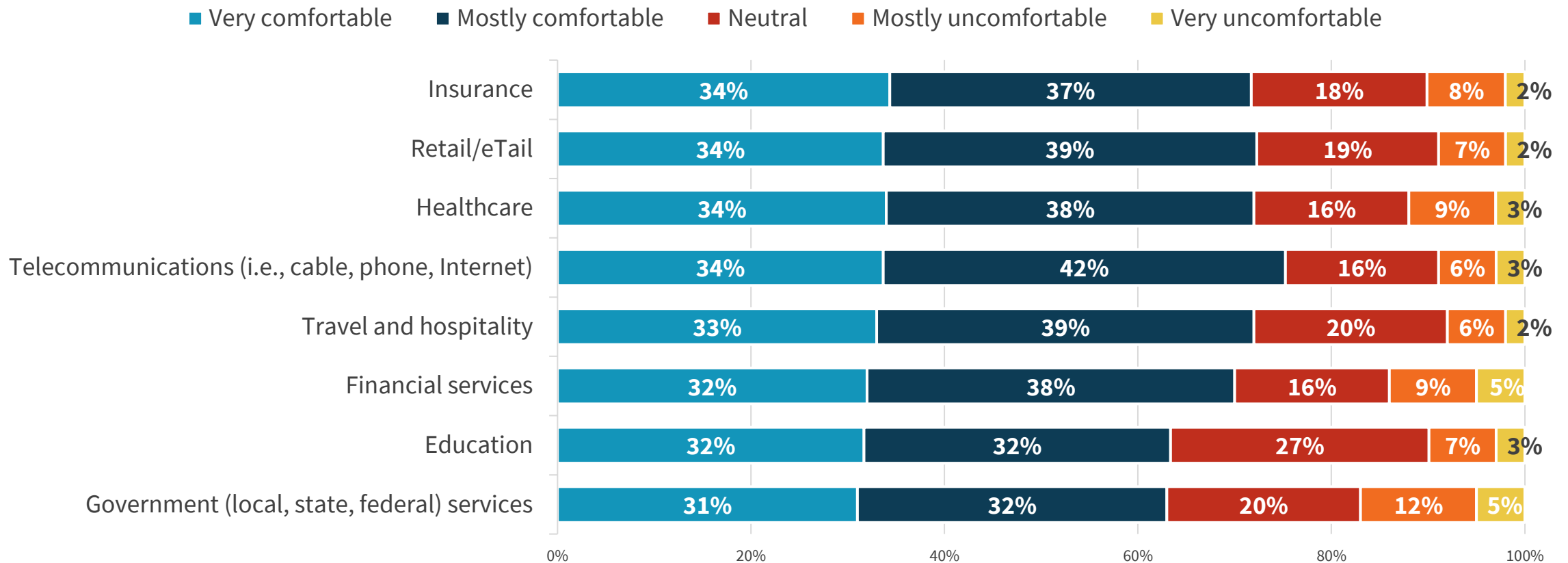# 83% of respondents report free-form speech and text is important in automated CX interactions

Older adults are least likely to think free-form text in text-based solution is "critical" compared to middle-age and younger adults (22% vs. 31% vs. 30%)

■ Critical   ■ Important   ■ Neutral   ■ Not very important   ■ Not at all important
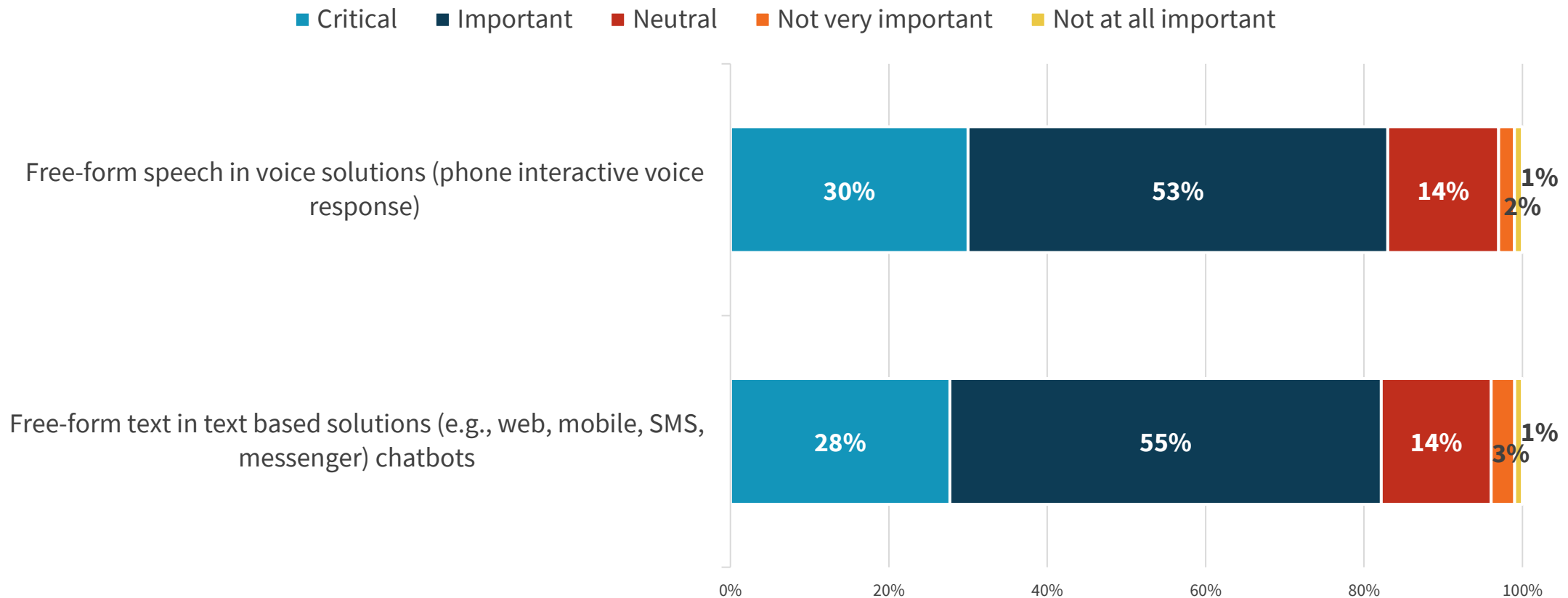
Question text: How important is it to you to be able to communicate naturally in free-form text or free-form speech when interacting with automated CX solutions (as opposed to selecting from predefined options)? (Percent of respondents, N=1,000)
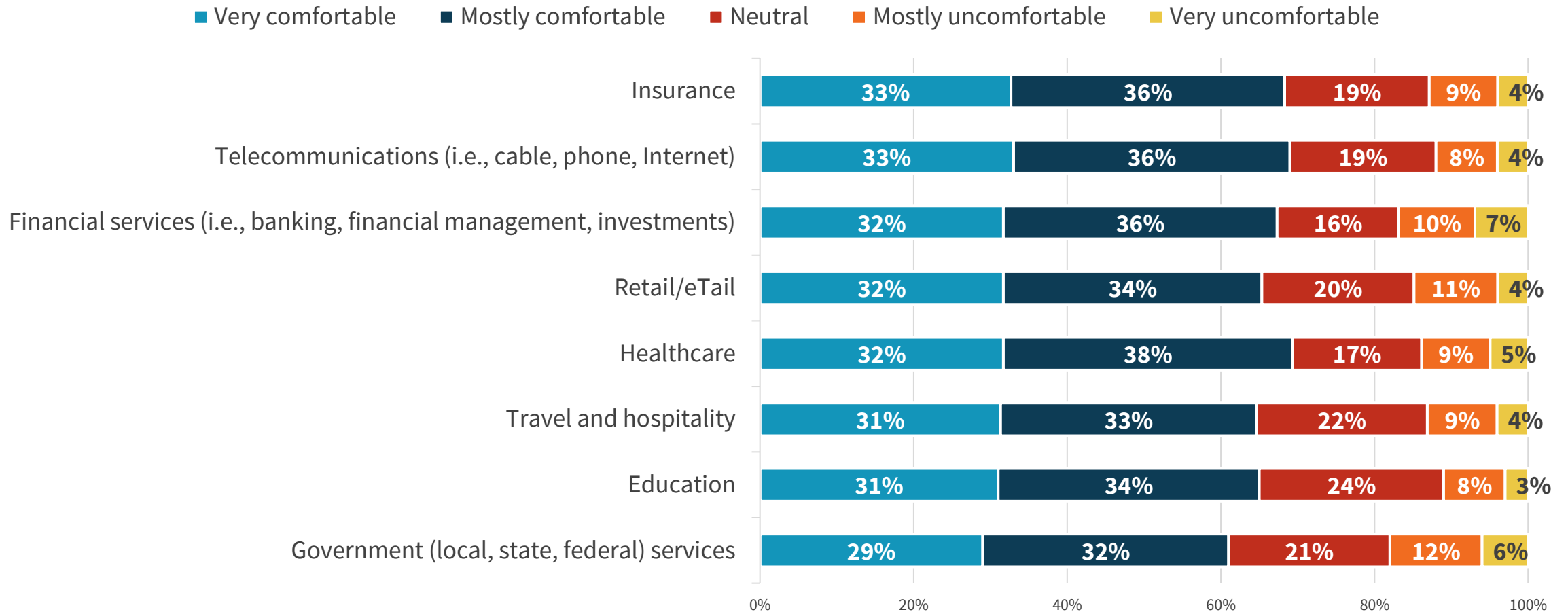
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Respondents are mostly comfortable with automated CX solutions making use of known PII during interactions

On average, 70% of respondents indicate they were comfortable with automated CX solution using personally identifiable information in their interaction.

Legend: ■ Very comfortable ■ Mostly comfortable ■ Neutral ■ Mostly uncomfortable ■ Very uncomfortable

Industry	Very comfortable	Mostly comfortable	Neutral	Mostly uncomfortable	Very uncomfortable
Insurance	34%	37%	18%	8%	2%
Retail/eTail	34%	39%	19%	7%	2%
Healthcare	34%	38%	16%	9%	3%
Telecommunications (i.e., cable, phone, Internet)	34%	42%	16%	6%	3%
Travel and hospitality	33%	39%	20%	6%	2%
Financial services	32%	38%	16%	9%	5%
Education	32%	32%	27%	7%	3%
Government (local, state, federal) services	31%	32%	20%	12%	5%

Question text: For each of the following industries, how comfortable are you if an automated CX solution makes use of personally identifiable information already known about you or the context of your interaction to help you? (Percent of respondents, N=1,000)
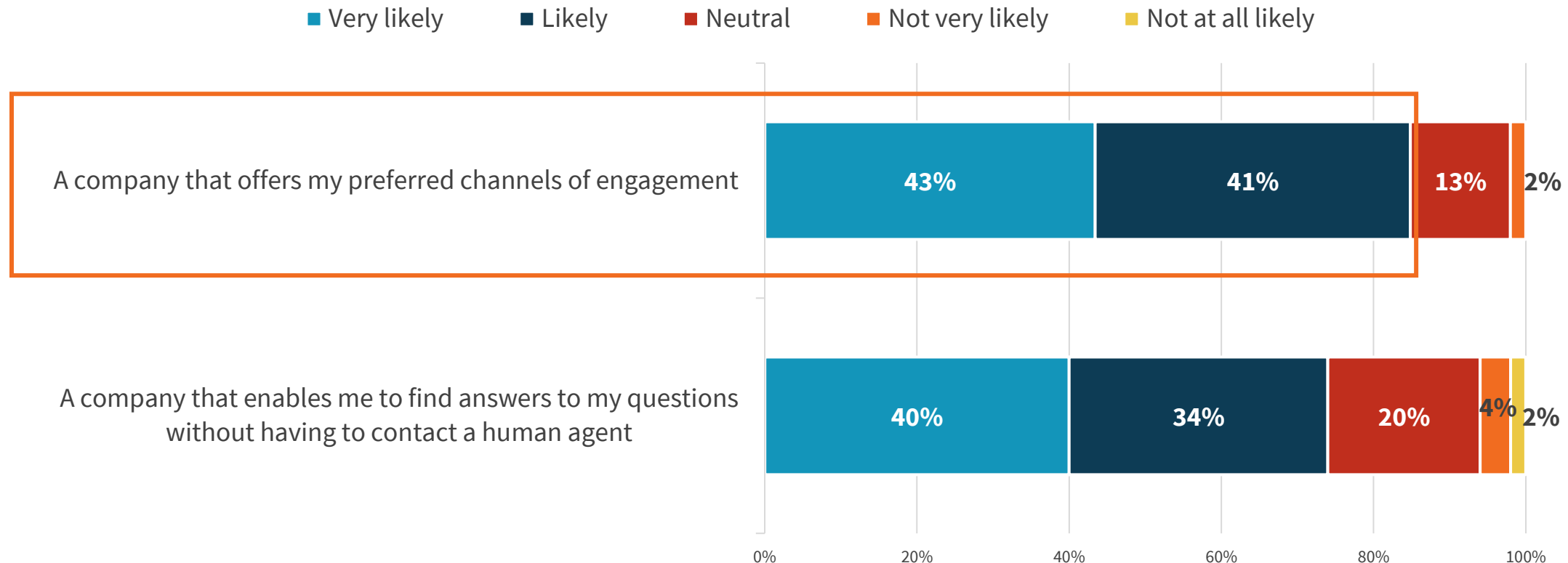
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Similarly, most respondents are comfortable providing previously unknown PII during automated CX interactions

■ Very comfortable   ■ Mostly comfortable   ■ Neutral   ■ Mostly uncomfortable   ■ Very uncomfortable

Industry	Very comfortable	Mostly comfortable	Neutral	Mostly uncomfortable	Very uncomfortable
Insurance	33%	36%	19%	9%	4%
Telecommunications (i.e., cable, phone, Internet)	33%	36%	19%	8%	4%
Financial services (i.e., banking, financial management, investments)	32%	36%	16%	10%	7%
Retail/eTail	32%	34%	20%	11%	4%
Healthcare	32%	38%	17%	9%	5%
Travel and hospitality	31%	33%	22%	9%	4%
Education	31%	34%	24%	8%	3%
Government (local, state, federal) services	29%	32%	21%	12%	6%

Question text: For each of the following industries, how comfortable are you providing your personally identifiable information to a brand in the following industries via an automated CX platform? (Percent of respondents, N=1,000)
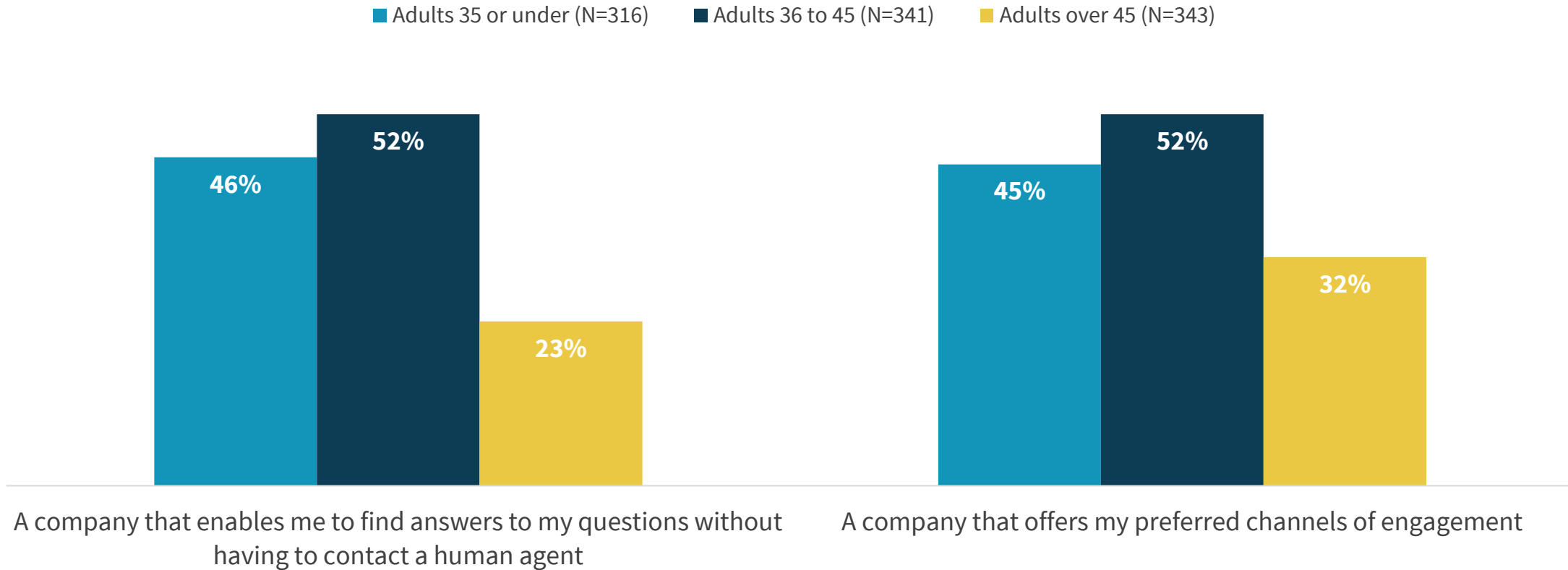
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Respondents want to choose their channel, avoid agent contact and will spend more with brands that deliver

84% of respondents indicate they will spend more with a company if the company allows them to their choice of preferred channel engagement.

Legend: ■ Very likely ■ Likely ■ Neutral ■ Not very likely ■ Not at all likely

A company that offers my preferred channels of engagement: Very likely 43%, Likely 41%, Neutral 13%, Not very likely 2%

A company that enables me to find answers to my questions without having to contact a human agent: Very likely 40%, Likely 34%, Neutral 20%, Not very likely 4%, Not at all likely 2%
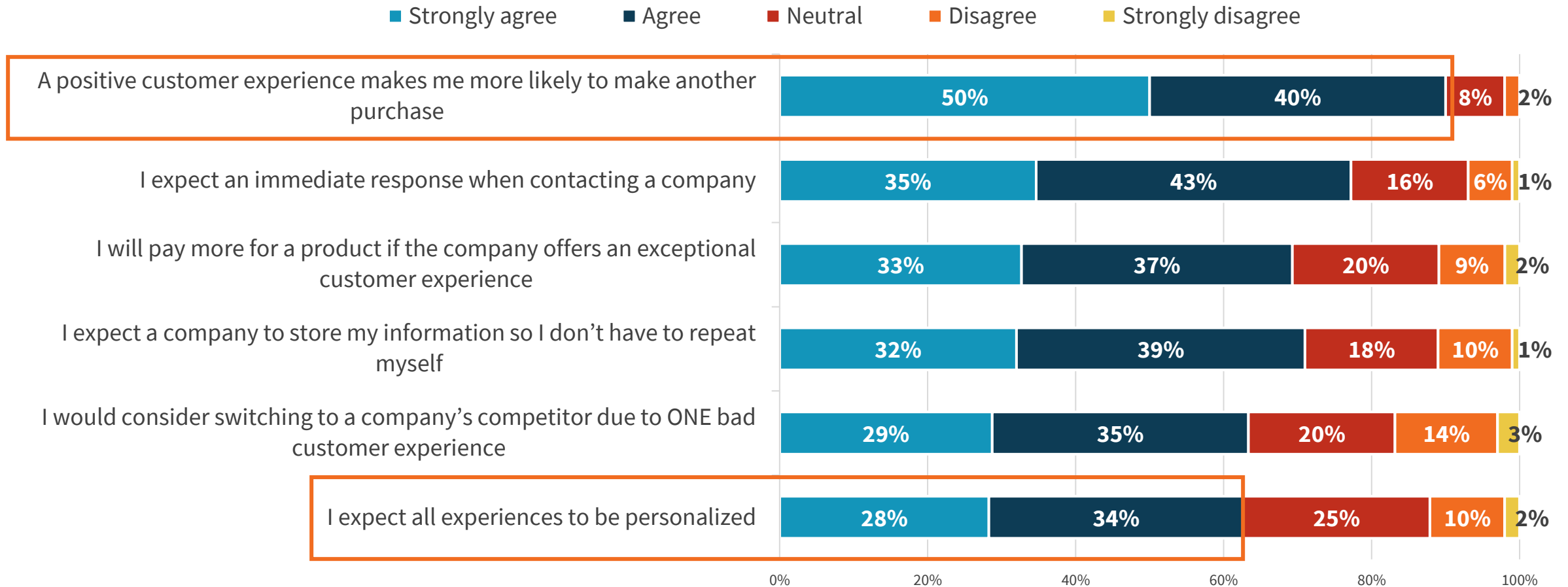
Question text: How likely are you to spend more with a company that provides the following customer experiences? (Percent of respondents, N=1,000)

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Younger respondents are more likely to reward brands that deliver channel flexibility, allow them to avoid live agents

■ Adults 35 or under (N=316)   ■ Adults 36 to 45 (N=341)   ■ Adults over 45 (N=343)

52%
46%
23%

A company that enables me to find answers to my questions without having to contact a human agent

52%
45%
32%

A company that offers my preferred channels of engagement

Question text: How likely are you to spend more with a company that provides the following customer experiences? (Percent of respondents reporting "Very likely")

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General CX Background Information

90% of respondents agree that a positive experience makes them more likely to make another purchase

Legend: ■ Strongly agree ■ Agree ■ Neutral ■ Disagree ■ Strongly disagree

Statement	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
A positive customer experience makes me more likely to make another purchase	50%	40%	8%	2%	
I expect an immediate response when contacting a company	35%	43%	16%	6%	1%
I will pay more for a product if the company offers an exceptional customer experience	33%	37%	20%	9%	2%
I expect a company to store my information so I don't have to repeat myself	32%	39%	18%	10%	1%
I would consider switching to a company's competitor due to ONE bad customer experience	29%	35%	20%	14%	3%
I expect all experiences to be personalized	28%	34%	25%	10%	2%

Question text: Please rate your level of agreement with the following statements about the impact of customer experience. (Percent of respondents, N=1,000)
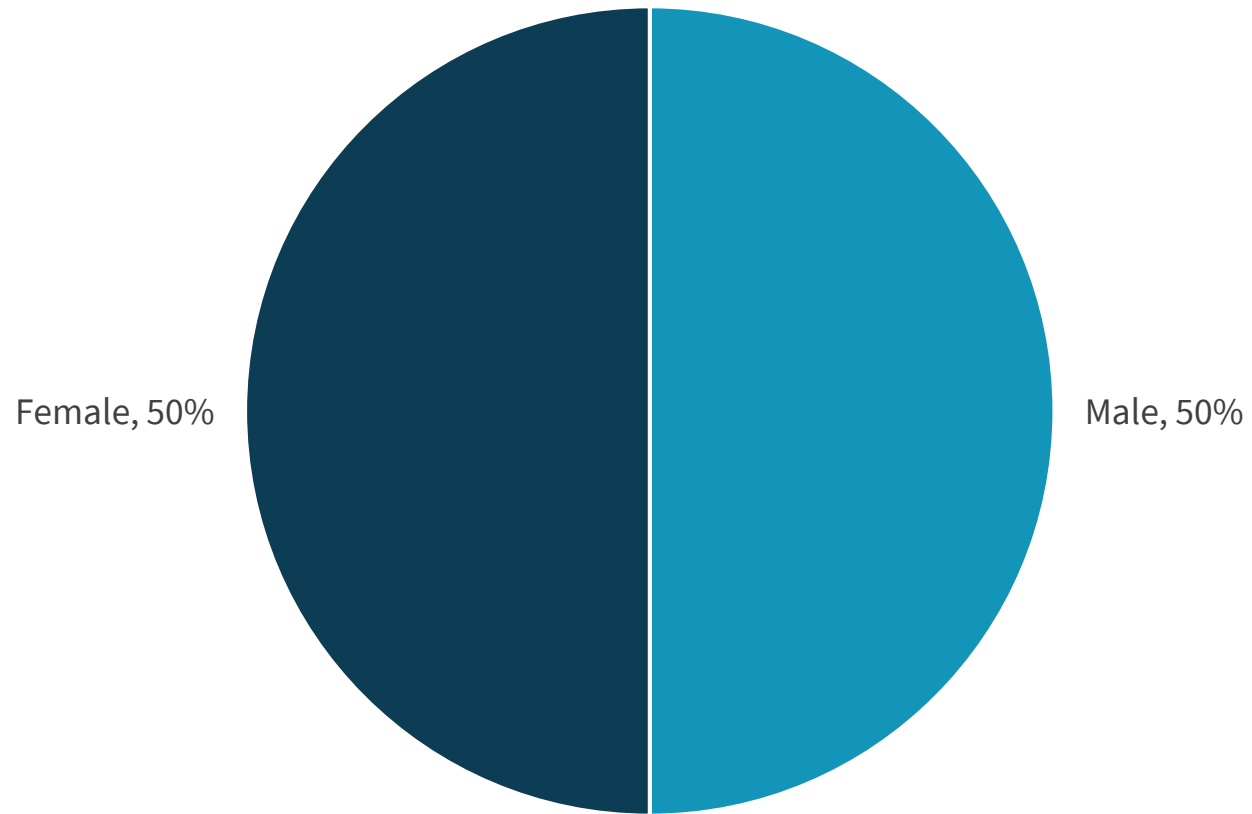
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Younger customers have higher CX expectations

A positive customer experience makes me more likely to make another purchase
- 47%
- 55%
- 48%

I expect an immediate response when contacting a company
- 39%
- 43%
- 23%

I would consider switching to a company's competitor due to ONE bad customer experience
- 37%
- 35%
- 16%

I will pay more for a product if the company offers an exceptional customer experience
- 36%
- 43%
- 21%

I expect a company to store my information so I don't have to repeat myself
- 36%
- 39%
- 22%

I expect all experiences to be personalized
- 34%
- 37%
- 15%

■ Adults 35 or under (N=316)

■ Adults 36 to 45 (N=341)

■ Adults over 45 (N=343)

Question text: Please rate your level of agreement with the following statements about the impact of customer experience.: (Percent of respondents that "Strongly agree")

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Respondent
Demographics

Respondents by age

18 to 25	26 to 35	36 to 45	46 to 55	Over 55
11%	21%	34%	13%	22%
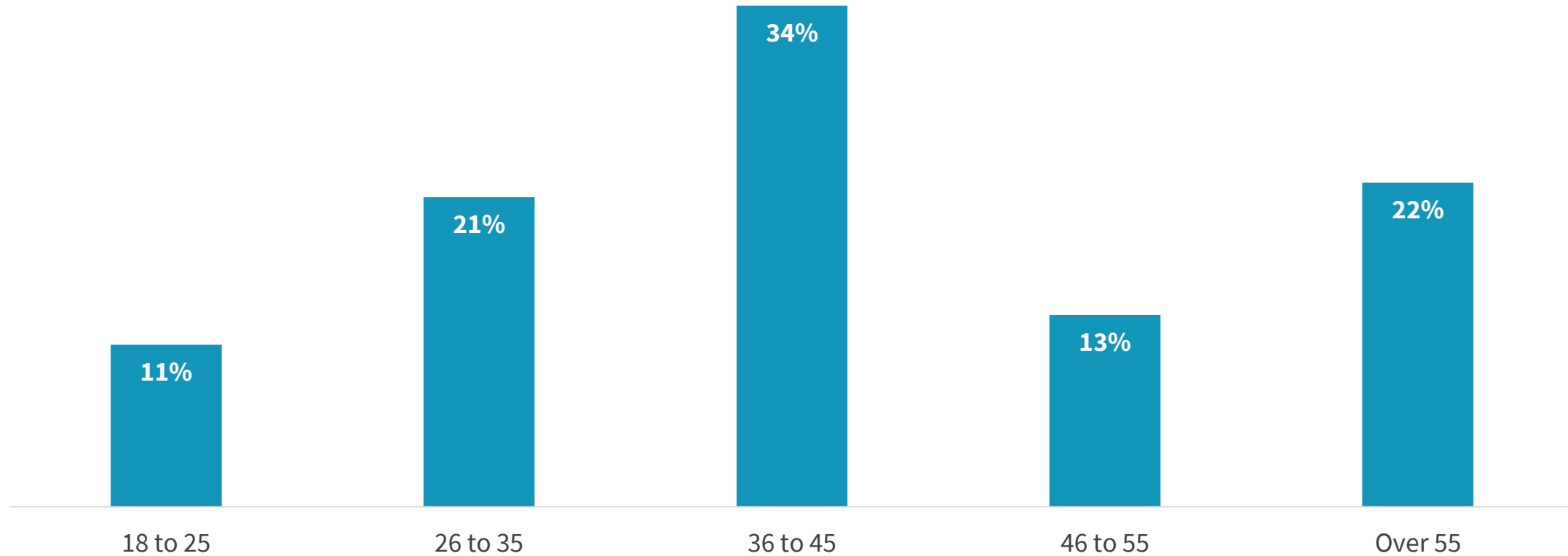
Question text: Respondents by age (Percent of respondents, N=1,000)

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Respondents by Gender

Female, 50%

Male, 50%

Question text: Respondents by gender (Percent of respondents, N=1,000)

Respondents by education level

- Incomplete secondary education (high school): 2%
- Completed secondary education (high school): 14%
- Some university or vocational education: 16%
- Completed vocational education: 9%
- Completed university bachelor's degree: 33%
- Completed university master's degree: 20%
- Completed university doctorate degree: 7%
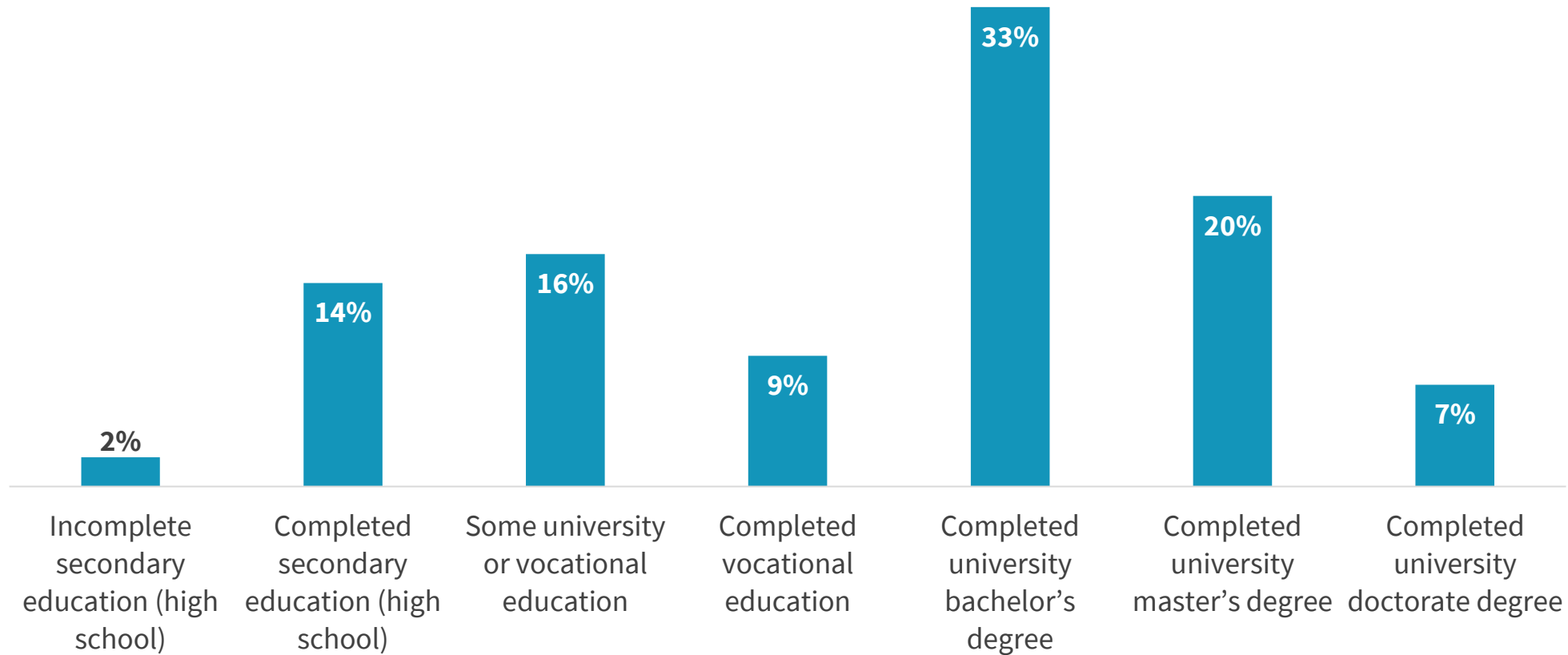
Question text: What is the highest level of education you have completed? (Percent of respondents, N=1,000)

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Respondents by household income

10%	19%	18%	15%	20%	10%	4%	4%	2%
Less than $25,000	$25,000 to $49,999	$50,000 to $74,999	$75,000 to $99,999	$100,000 to $149,999	$150,000 to $199,999	$200,000 to $249,999	$250,000 or more	Prefer not to answer

Question text: What is your annual household income in $USD? (Percent of respondents, N=1,000)

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Respondents by innovation adoption lifecycle

39%	25%	26%	7%	3%
I am generally the first to try a new technology product	I am generally among the first to try a new technology product	I am generally in the middle when it comes to trying a new technology product	I am generally among the last to try a new technology product	I am generally the last to try a new technology product
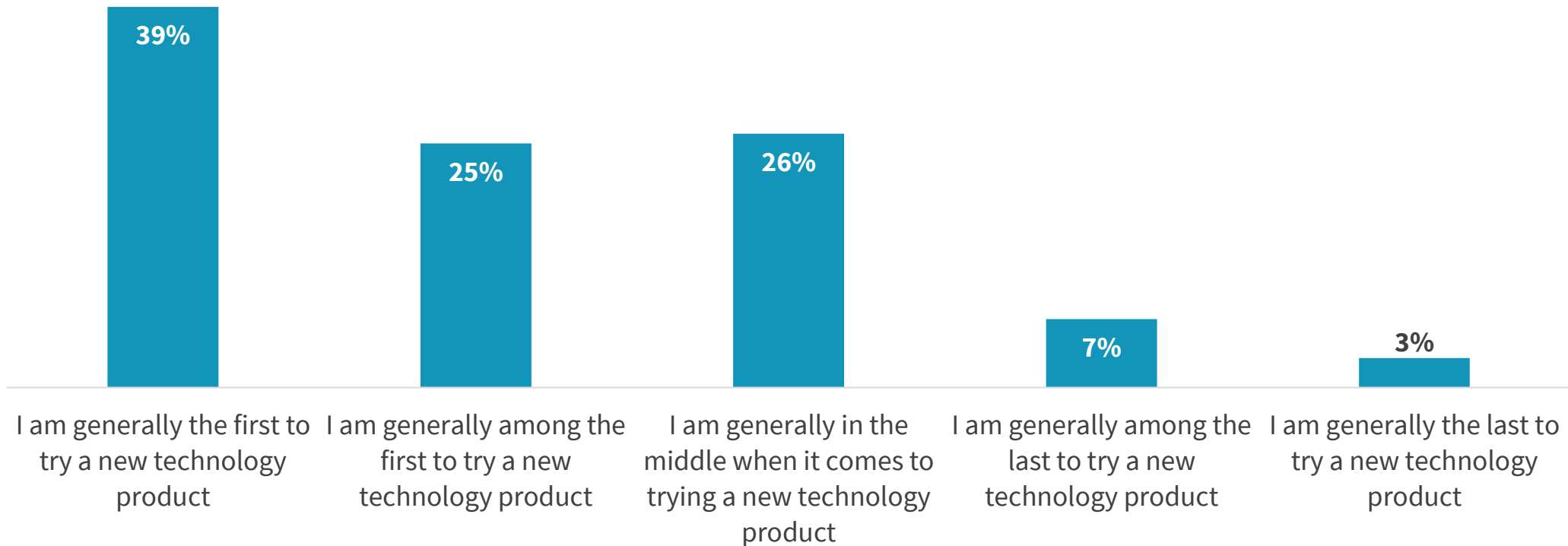
Question text: Compared to other people you know, how would you describe yourself? (Percent of respondents, N=1,000)

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Thank You

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