THIRD EDITION

STATE of the CONNECTED CUSTOMER

Insights from over 8,000 consumers and business buyers worldwide
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.
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

- 84% of customers say the experience a company provides is as important as its products and services.
- 73% of customers say one extraordinary experience raises their expectations of other companies.
- 66% of customers are willing to pay more for a great experience.

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.

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

#### Customers Who Say These Factors Change Their Expectations of Companies

<table>
<thead>
<tr>
<th>Factor</th>
<th>All Customers</th>
<th>Consumers</th>
<th>Business Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better access to information (e.g., product information, reviews)</td>
<td>91%</td>
<td>92%</td>
<td>94%</td>
</tr>
<tr>
<td>Increased product choice</td>
<td>91%</td>
<td>91%</td>
<td>91%</td>
</tr>
<tr>
<td>New types/categories of products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ecommerce</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased awareness of corporate values, ethics, and business practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peer reviews (e.g., Yelp, Amazon reviews)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New business models (e.g., sharing economy, subscriptions, direct-to-consumer)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New methods of communication (e.g., messaging apps.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emerging technologies (e.g., chatbots, voice assistants)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See page 46 for additional data segmentations.
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.

EXTRAORDINARY EXPERIENCES RAISE THE BAR FOR CUSTOMER ENGAGEMENT

Companies Aren’t Living Up to Customers’ Personalization Expectations

- 73% of customers expect companies to understand their needs and expectations
- 51% of customers say companies generally understand their needs and expectations
- 62% of customers expect companies to adapt based on their actions and behavior
- 47% of customers say companies generally adapt based on their actions and behavior
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.
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.

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**Preferred Channels Span Online and Offline Worlds**

Customers Who Prefer the Following Channels When Communicating with Companies

<table>
<thead>
<tr>
<th>Channel</th>
<th>Gen Xers</th>
<th>Millennials/Gen Zers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>65%</td>
<td>64%</td>
<td>62%</td>
</tr>
<tr>
<td>In-person</td>
<td>59%</td>
<td>59%</td>
<td>62%</td>
</tr>
<tr>
<td>Phone</td>
<td>56%</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Online chat/live support (e.g., popup windows on website)</td>
<td>45%</td>
<td>28% 45%</td>
<td>55%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>43%</td>
<td>24% 42% 56%</td>
<td></td>
</tr>
<tr>
<td>Online portals (e.g., self-service account information)</td>
<td>43%</td>
<td>29% 44% 50%</td>
<td></td>
</tr>
<tr>
<td>Online knowledge bases (e.g., self-service FAQs, searchable libraries)</td>
<td>41%</td>
<td>29% 41% 49%</td>
<td></td>
</tr>
<tr>
<td>Messenger apps (e.g., WhatsApp, Facebook Messenger)</td>
<td>37%</td>
<td>21% 36% 48%</td>
<td></td>
</tr>
<tr>
<td>Online forms</td>
<td>36%</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Social media</td>
<td>32%</td>
<td>15% 30% 45%</td>
<td></td>
</tr>
<tr>
<td>Text/SMS</td>
<td>31%</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>30%</td>
<td>16% 29% 39%</td>
<td></td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>22%</td>
<td>13% 22% 28%</td>
<td></td>
</tr>
</tbody>
</table>

See page 49 for additional data segmentations.
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?

**Extraordinary Experiences Raise the Bar for Customer Engagement**

**Customers Who Say the Following**

<table>
<thead>
<tr>
<th>%</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer different channels depending on context (i.e., where I am and what I’m doing)</td>
<td>82%</td>
<td>80%</td>
<td>67%</td>
</tr>
<tr>
<td>I prefer different devices depending on context (i.e., where I am and what I’m doing)</td>
<td>79%</td>
<td>76%</td>
<td>61%</td>
</tr>
<tr>
<td>I have used multiple channels to start and complete a single transaction</td>
<td>73%</td>
<td>55%</td>
<td>73%</td>
</tr>
<tr>
<td>I have used multiple devices to start and complete a single transaction</td>
<td>71%</td>
<td>75%</td>
<td>67%</td>
</tr>
</tbody>
</table>

See page 43 for additional data segmentations.
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 consistent interactions across departments.

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.

72% of customers expect all company representatives to have the same information about them.

Customers Expect Unity but Often Face Silos

59% of customers say it generally feels like they're communicating with separate departments, not one company.

66% of customers say they often have to repeat or re-explain information to different representatives.

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.

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>49%</td>
<td>58%</td>
<td>49%</td>
<td>39%</td>
</tr>
<tr>
<td>47%</td>
<td>54%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>44%</td>
<td>53%</td>
<td>43%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Consumers Who Say the Following

- 49% I buy at least one product directly from a brand on a regular basis
- 47% I identify more with the brands I buy than the retailers I buy from
- 44% I expect to buy more products directly from brands in the future
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.

See pages 50 and 51 for additional data segmentations.
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.

New Expectations Shift the Digital Transformation Playbook

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.
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.

See page 50 for additional data segmentations.
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.

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.
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 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

- Honesty: 82%
- Security: 78%
- Confidence: 61%
- Reliability: 76%
- Privacy: 75%
- Authenticity: 61%
- Ethics: 64%
- Transparency: 70%

See pages 52 through 56 for additional data segmentations.
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.

See pages 52 and 54 for additional data segmentations.
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

I’m comfortable with relevant personal information being used in a transparent and beneficial manner

17% disagree
58% agree
25% neutral

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

48% of customers have stopped 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.

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.
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
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

I want companies to advocate for equal rights

76%

I'm more loyal to companies that value equality

73%

I expect companies to clearly state their position on equal rights

71%

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

55%

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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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.

Seventy-four percent of customers say a company’s sustainability practices matter more than they did a year ago.

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.

As Some Sectors Elevate Engagement, Others Stagnate

Customer Industry Rankings for Experience*

See pages 59 and 60 for additional data segmentations.

* 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

- **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%**

New Expectations Shift the Digital Transformation Playbook

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

I use a connected device: **82%**
I view voice assistants as revolutionary: **58%**
I can think of an example of AI I use every day: **32%**

Trust Becomes More Important, Yet More Elusive

- **77%** believe trust in companies matters more than it did a year ago
- **41%** believe most companies aren’t transparent about how they use customers’ data

Corporate Values Sway Buying Decisions

- **77%** believe a company’s ethics matter more than they did a year ago
- **55%** won’t buy from companies that don’t value equality

Customers Who List the Following as Preferred Channels

- **39%** use online chat/live support (e.g., popup windows on website)
- **35%** use mobile app
- **29%** use text/SMS
- **25%** use online communities (i.e., forums)
- **16%** use voice assistants (e.g., Siri, Alexa)

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Online chat/live support</em></td>
<td>39%</td>
<td>17%</td>
<td>44%</td>
<td>52%</td>
</tr>
<tr>
<td><em>Mobile app</em></td>
<td>35%</td>
<td>9%</td>
<td>35%</td>
<td>55%</td>
</tr>
<tr>
<td><em>Text/SMS</em></td>
<td>29%</td>
<td>18%</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td><em>Online communities</em></td>
<td>25%</td>
<td>6%</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td><em>Voice assistants</em></td>
<td>16%</td>
<td>1%</td>
<td>19%</td>
<td>23%</td>
</tr>
</tbody>
</table>

I expect companies to communicate with me in real time: **74%**
I trust companies to use AI in a way that benefits me: **46%**
I actively seek to buy from philanthropic companies: **52%**

I don’t buy from companies that don’t value equality: **55%**
I actively seek to buy from environmentally sustainable companies: **64%**

I believe a company’s ethics matter more than they did a year ago: **77%**
I 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%**
Country Profile
Canada (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- **57%** of customers expect connected experiences
- **53%** 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: **60%**
I expect companies to communicate with me in real time: **70%**

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

- **64%** of customers expect companies to use new technologies to create better experiences

I use a connected device: 74%
I view voice assistants as revolutionary: 44%
I can think of an example of AI I use every day: 39%
I use a connected device: 71%
I view voice assistants as revolutionary: 47%
I can think of an example of AI I use every day: 27%

Trust Becomes More Important, Yet More Elusive

- I believe trust in companies matters more than it did a year ago: 66%
- 32%
- I don’t believe companies care about the security of my data: 58%
- I have stopped buying from a company that did something distrustful: 58%
- 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: 64%
- I won’t buy from companies that don’t value equality: 50%
- I actively seek to buy from philanthropic companies: 46%
- I actively seek to buy from environmentally sustainable companies: 52%
Country Profile
France (540 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 57% of customers expect connected experiences
- 59% of customers say it generally feels like they’re communicating with separate departments, not one company
- 50% of customers say companies need to transform how they engage with them

I would rather use self-service for simple questions/issues: 59%
I expect companies to communicate with me in real time: 66%

New Expectations Shift the Digital Transformation Playbook

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

I use a connected device every day: 80%
I view voice assistants as revolutionary: 51%
I can think of an example of AI I use every day: 39%

Trust Becomes More Important, Yet More Elusive

- I believe trust in companies matters more than it did a year ago: 66%
- I don’t believe companies care about the security of my data: 46%
- I have stopped buying from a company that did something distrustful: 64%
- 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: 66%
- I won’t buy from companies that don’t value equality: 46%
- I actively seek to buy from philanthropic companies: 48%
- I actively seek to buy from environmentally sustainable companies: 63%

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online chat/live support (e.g., popup windows on website)</td>
<td>36%</td>
<td>34%</td>
<td>31%</td>
<td>40%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>28%</td>
<td>23%</td>
<td>19%</td>
<td>35%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>24%</td>
<td>24%</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>16%</td>
<td>11%</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>8%</td>
<td>6%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Country Profile
Germany (536 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement
- 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

New Expectations Shift the Digital Transformation Playbook
- 58% of customers expect companies to use new technologies to create better experiences

Trust Becomes More Important, Yet More Elusive
- I believe trust in companies matters more than it did a year ago
- 72%
- 51%
- 39%
- 15%

Corporate Values Sway Buying Decisions
- I expect companies to communicate with me in real time
- 59%
- 52%
- 46%
- 33%
- 21%

Customers Who List the Following as Preferred Channels
- Mobile app: 29%
- Online chat/live support (e.g., popup windows on website): 28%
- Online communities (i.e., forums): 20%
- Text/SMS: 18%
- Voice assistants (e.g., Siri, Alexa): 12%
Country Profile
Hong Kong (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement
- 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

Customers Who List the Following as Preferred Channels
- Mobile app: 57% (49% Millennials/Gen Zers, 67% All Customers)
- Online chat/live support: 46% (40% Millennials/Gen Zers, 57% All Customers)
- Text/SMS: 37% (32% Millennials/Gen Zers, 40% All Customers)
- Online communities: 35% (35% Millennials/Gen Zers, 34% All Customers)
- Voice assistants: 29% (27% Millennials/Gen Zers, 30% All Customers)

New Expectations Shift the Digital Transformation Playbook
- 80% of customers expect companies to use new technologies to create better experiences
- 70% of customers expect companies to communicate with me in real time
- 56% of customers trust companies to use AI in a way that benefits me

Trust Becomes More Important, Yet More Elusive
- 72% of customers believe trust in companies matters more than it did a year ago
- 48% of customers have stopped buying from a company that did something distrustful
- 40% of customers don’t believe companies care about the security of my data
- 68% of customers believe most companies aren’t transparent about how they use my data

Corporate Values Sway Buying Decisions
- 73% of customers believe a company’s ethics matter more than they did a year ago
- 71% of customers actively seek to buy from philanthropic companies
- 57% of customers won’t buy from companies that don’t value equality

I use a connected device daily
- 97% of customers
- 96% of Millennials/Gen Zers
- 95% of All Customers

I view voice assistants as revolutionary
- 57% of customers
- 60% of Millennials/Gen Zers
- 59% of All Customers

I can think of an example of AI I use every day
- 48% of customers
- 40% of Millennials/Gen Zers
- 39% of All Customers

Salesforce Research
Country Profile
India (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 92% of customers expect connected experiences
- 75% of customers say it generally feels like they're communicating with separate departments, not one company
- 85% 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: 89%

New Expectations Shift the Digital Transformation Playbook

- 92% of customers expect companies to use new technologies to create better experiences

I trust companies to use AI in a way that benefits me: 90%

I'm open to the use of AI to improve my experiences: 90%

Trust Becomes More Important, Yet More Elusive

- I believe trust in companies matters more than it did a year ago: 88%
- I don't believe companies care about the security of my data: 51%
- I believe most companies aren't transparent about how they use my data: 71%

Corporate Values Sway Buying Decisions

- I believe a company's ethics matter more than they did a year ago: 87%
- I won't buy from companies that don't value equality: 69%
- I actively seek to buy from environmentally sustainable companies: 87%

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>Preferred</th>
<th>Among Millennials/Gen Zers</th>
<th>Among Gen Xers</th>
<th>Among Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app</td>
<td>86%</td>
<td>80%</td>
<td>89%</td>
<td></td>
</tr>
<tr>
<td>Online chat/live support (e.g., popup windows on website)</td>
<td>82%</td>
<td>77%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>72%</td>
<td>73%</td>
<td>75%</td>
<td></td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>70%</td>
<td>67%</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>Text/SMS</td>
<td>65%</td>
<td>58%</td>
<td>71%</td>
<td></td>
</tr>
</tbody>
</table>

Salesforce Research
## Country Profile
Italy (535 customers)

### Extraordinary Experiences Raise the Bar for Customer Engagement

- **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

**Customers Who List the Following as Preferred Channels**

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online chat/live support</td>
<td>52%</td>
<td>37%</td>
<td>51%</td>
<td>64%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>40%</td>
<td>30%</td>
<td>32%</td>
<td>55%</td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>27%</td>
<td>22%</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>23%</td>
<td>17%</td>
<td>20%</td>
<td>34%</td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>19%</td>
<td>16%</td>
<td>20%</td>
<td>21%</td>
</tr>
</tbody>
</table>

### New Expectations Shift the Digital Transformation Playbook

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

**Trust Becomes More Important, Yet More Elusive**

- I believe trust in companies matters more than it did a year ago: **71%**
- I have stopped buying from a company that did something distressful: **62%**
- 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: **51%**

### 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: **54%**
- I won’t buy from companies that don’t value equality: **63%**
- I actively seek to buy from environmentally sustainable companies: **75%**
Country Profile
Japan (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- **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%**

New Expectations Shift the Digital Transformation Playbook

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

Trust Becomes More Important, Yet More Elusive

Corporation values sway buying decisions

I believe companies need to transform how they engage with them

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 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%**

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>% Customers</th>
<th>16%</th>
<th>27%</th>
<th>39%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Text/SMS</td>
<td>24%</td>
<td>16%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Online communities (e.g., forums)</td>
<td>19%</td>
<td>11%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Online chat/live support (e.g., popup windows on website)</td>
<td>18%</td>
<td>11%</td>
<td>20%</td>
<td>24%</td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>13%</td>
<td>11%</td>
<td>14%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Country Profile
Singapore (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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 expect companies to communicate with me in real time: 71%
I would rather use self-service for simple questions/issues: 76%

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%

Trust Becomes More Important, Yet More Elusive

- I believe trust in companies matters more than it did a year ago: 81%
- I don’t believe companies care about the security of my data: 44%
- I have stopped buying from a company that did something distrustful: 73%
- 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%

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app</td>
<td>56%</td>
<td>47%</td>
<td>42%</td>
<td>39%</td>
</tr>
<tr>
<td>Online chat/live support</td>
<td>56%</td>
<td>60%</td>
<td>62%</td>
<td>42%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>41%</td>
<td>39%</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>Online communities</td>
<td>40%</td>
<td>42%</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>Voice assistants</td>
<td>30%</td>
<td>25%</td>
<td>35%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Country Profile
Spain (536 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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

<table>
<thead>
<tr>
<th>Channel</th>
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<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
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<tbody>
<tr>
<td>Online chat/live support</td>
<td>36%</td>
<td>26%</td>
<td>48%</td>
<td>30%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>30%</td>
<td>19%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>18%</td>
<td>11%</td>
<td>14%</td>
<td>25%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>7%</td>
<td>5%</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

New Expectations Shift the Digital Transformation Playbook

- 84% of customers expect companies to use new technologies to create better experiences
- 60% 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

Trust Becomes More Important, Yet More Elusive

- 68% 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
- 59% I believe most companies aren’t transparent about how they use my data

Corporate Values Sway Buying Decisions

- 72% I believe a company’s ethics matter more than they did a year ago
- 52% I actively seek to buy from philanthropic companies
- 65% I actively seek to buy from environmentally sustainable companies
- 63% I won’t buy from companies that don’t value equality
Country Profile
Switzerland (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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%

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 have stopped buying from a company that did something distrustful: 80%
- 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: 69%

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: 67%
- I won’t buy from companies that don’t value equality: 59%
- I actively seek to buy from environmentally sustainable companies: 74%

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
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<tbody>
<tr>
<td>Mobile app</td>
<td>57%</td>
</tr>
<tr>
<td>Online chat/live support</td>
<td>52%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>51%</td>
</tr>
<tr>
<td>Online communities</td>
<td>50%</td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>50%</td>
</tr>
</tbody>
</table>

- Mobile app: 29% prefer, 62% neutral, 70% positive
- Online chat/live support: 33% prefer, 56% neutral, 61% positive
- Text/SMS: 35% prefer, 54% neutral, 61% positive
- Online communities: 24% prefer, 58% neutral, 59% positive
- Voice assistants: 16% prefer, 54% neutral, 71% positive

Salesforce Research
Country Profile
Thailand (535 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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 expect companies to communicate with me in real time: 77%
I would rather use self-service for simple questions/issues: 86%

New Expectations Shift the Digital Transformation Playbook

- 91% of customers expect companies to use new technologies to create better experiences
- 86% of customers expect companies to use AI in a way that benefits me
- 75% of customers believe they need connected experiences

Trust Becomes More Important, Yet More Elusive

- 87% of customers believe trust in companies matters more than it did a year ago
- 68% of customers trust companies to use AI in a way that benefits me
- 63% of customers expect connected experiences

Corporate Values Sway Buying Decisions

- 83% of customers actively seek to buy from philanthropic companies
- 81% of customers believe a company’s ethics matter more than they did a year ago
- 68% of customers won’t buy from companies that don’t value equality

Customers Who List the Following as Preferred Channels

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<thead>
<tr>
<th>Channel</th>
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<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app</td>
<td>70%</td>
<td>57%</td>
<td>68%</td>
<td>76%</td>
</tr>
<tr>
<td>Online chat/live support</td>
<td>63%</td>
<td>57%</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>Online communities</td>
<td>52%</td>
<td>46%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Voice assistants</td>
<td>35%</td>
<td>24%</td>
<td>32%</td>
<td>66%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>33%</td>
<td>24%</td>
<td>27%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Salesforce Research
Country Profile
United Kingdom/Ireland (540 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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%

New Expectations Shift the Digital Transformation Playbook

- 67% of customers expect companies to use new technologies to create better experiences
- 67% of customers trust companies to use AI in a way that benefits me
- 53% of customers believe companies need to transform how they engage with them

Trust becomes more important, yet more elusive

- 67% of customers believe trust in companies matters more than it did a year ago
- 46% of customers have stopped buying from a company that did something distrustful
- 53% of customers believe companies need to be transparent about how they use my data

Corporate Values Sway Buying Decisions

- 67% of customers believe a company's ethics matter more than they did a year ago
- 66% of customers actively seek to buy from philanthropic companies
- 51% of customers actively seek to buy from environmentally sustainable companies

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online chat/live support</td>
<td>41%</td>
<td>22%</td>
<td>37%</td>
<td>61%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>26%</td>
<td>10%</td>
<td>23%</td>
<td>40%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>18%</td>
<td>15%</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>15%</td>
<td>6%</td>
<td>11%</td>
<td>26%</td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>7%</td>
<td>3%</td>
<td>6%</td>
<td>13%</td>
</tr>
</tbody>
</table>
**Country Profile**
United States (1,055 customers)

**Extraordinary Experiences Raise the Bar for Customer Engagement**

- 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

**New Expectations Shift the Digital Transformation Playbook**

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

**Trust Becomes More Important, Yet More Elusive**

- 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 believe most companies aren’t transparent about how they use my data (60%)

**Corporate Values Sway Buying Decisions**

- I believe a company’s ethics matter more than they did a year ago (73%)
- I actively seek to buy from philanthropic companies (52%)

**Customers Who List the Following as Preferred Channels**

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online chat/live support</td>
<td>44%</td>
<td>45%</td>
<td>27%</td>
<td>57%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>38%</td>
<td>36%</td>
<td>18%</td>
<td>56%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>33%</td>
<td>35%</td>
<td>19%</td>
<td>42%</td>
</tr>
<tr>
<td>Online communities</td>
<td>21%</td>
<td>20%</td>
<td>9%</td>
<td>32%</td>
</tr>
<tr>
<td>Voice assistants</td>
<td>13%</td>
<td>11%</td>
<td>3%</td>
<td>22%</td>
</tr>
</tbody>
</table>
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

- 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: 65%
I expect companies to communicate with me in real time: 72%

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: 40%
- I'm open to the use of AI to improve my experiences: 50%

Trust Becomes More Important, Yet More Elusive

- I believe trust in companies matters more than it did a year ago: 70%
- I have stopped buying from a company that did something distrustful: 60%

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: 50%

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>All Customers</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online chat/live support (e.g., popup windows on website)</td>
<td>40%</td>
<td>25% 41% 53%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile app</td>
<td>34%</td>
<td>32% 51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text/SMS</td>
<td>28%</td>
<td>29% 38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>19%</td>
<td>7% 18% 30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>12%</td>
<td>3% 20%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

I use a connected device: 81%
I view voice assistants as revolutionary: 54%
I can think of an example of AI I use every day: 46%
I use a connected device: 62%
I view voice assistants as revolutionary: 52%
I can think of an example of AI I use every day: 46%
I trust companies to use AI in a way that benefits me: 40%
I'm open to the use of AI to improve my experiences: 50%
Regional Profile
Europe (3,222 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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

New Expectations Shift the Digital Transformation Playbook

- 72% of customers expect companies to use new technologies to create better experiences
- 69% of customers expect companies to communicate with me in real time
- 60% of customers would rather use self-service for simple questions/issues

Customers Who List the Following as Preferred Channels

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

Trust Becomes More Important, Yet More Elusive

- 69% I believe trust in companies matters more than it did a year ago
- 42% I don’t believe companies care about the security of my data
- 44% I can think of an example of AI I use every day
- 35% I have stopped buying from a company that did something distrustful
- 19% I use a connected device

Corporate Values Sway Buying Decisions

- 69% I believe a company’s ethics matter more than they did a year ago
- 49% I actively seek to buy from philanthropic companies
- 65% I actively seek to buy from environmentally sustainable companies
- 42% I won’t buy from companies that don’t value equality
- 51% I trust companies to use AI in a way that benefits me
- 58% I’m open to the use of AI to improve my experiences
- 62% I have stopped buying from a company that did something distrustful
- 46% I can think of an example of AI I use every day
- 51% I use a connected device
- 35% I have stopped buying from a company that did something distrustful
- 19% I use a connected device
- 33% I can think of an example of AI I use every day
- 47% I trust companies to use AI in a way that benefits me
Regional Profile
Japan and Asia Pacific (3,210 customers)

Extraordinary Experiences Raise the Bar for Customer Engagement

- 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 expect companies to communicate with me in real time: 73%
I would rather use self-service for simple questions/issues: 78%

New Expectations Shift the Digital Transformation Playbook

- 81% of customers expect companies to use new technologies to create better experiences
- 65% of customers trust companies to use AI in a way that benefits me
- 72% of customers are open to the use of AI to improve their experiences

I use a connected device: 83%
I view voice assistants as revolutionary: 65%
I can think of an example of AI I use every day: 58%

Trust Becomes More Important, Yet More Elusive

- 79% of customers believe trust in companies matters more than it did a year ago
- 70% of customers have stopped buying from a company that did something distrustful
- 65% of customers believe most companies aren’t transparent about how they use my data

Corporate Values Sway Buying Decisions

- 78% of customers believe a company’s ethics matter more than they did a year ago
- 67% of customers actively seek to buy from philanthropic companies
- 71% of customers actively seek to buy from environmentally sustainable companies

Customers Who List the Following as Preferred Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
<th>customers prefer to use</th>
<th>customers prefer to use</th>
<th>customers prefer to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app</td>
<td>55%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online chat/live support</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(e.g., popup windows on website)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online communities</td>
<td>40%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(i.e., forums)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text/SMS</td>
<td>38%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voice assistants</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(e.g., Siri, Alexa)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix
Customers Who Say These Factors Change Their Expectations, by Generation

- **Better access to information** (e.g., product information, reviews):
  - Millennials/Gen Zers: 93%
  - Gen Xers: 92%
  - Silents/Baby Boomers: 90%

- **Increased product choice**: 91%

- **New types/categories of products**: 83%

- **E-commerce**: 73%

- **Increased awareness of corporate values, ethics, and business practices**: 80%

- **Peer reviews** (e.g., Yelp, Amazon reviews): 79%

- **New business models** (e.g., sharing economy, subscriptions, direct-to-consumer): 69%

- **New methods of communication** (e.g., messaging apps): 71%

- **Emerging technologies** (e.g., chatbots, voice assistants): 64%
Appendix

Extraordinary Experiences Raise the Bar for Customer Engagement

Customers Who Say the Following, by Generation

- I expect to find whatever I need from a company in three clicks or less
  - Millennials/Gen Zers: 59%
  - Gen Xers: 57%
  - Silents/Baby Boomers: 49%

- I won’t buy from a company that can’t ship quickly and cheaply
  - Millennials/Gen Zers: 58%
  - Gen Xers: 57%
  - Silents/Baby Boomers: 54%

- I expect to solve complex issues by speaking to one person
  - Millennials/Gen Zers: 76%
  - Gen Xers: 80%
  - Silents/Baby Boomers: 78%

- I expect tailored engagement based on past interactions
  - Millennials/Gen Zers: 67%
  - Gen Xers: 67%
  - Silents/Baby Boomers: 56%

- I expect connected experiences
  - Millennials/Gen Zers: 73%
  - Gen Xers: 71%
  - Silents/Baby Boomers: 59%

- I expect representatives of a company to have the same information about me
  - Millennials/Gen Zers: 73%
  - Gen Xers: 74%
  - Silents/Baby Boomers: 67%

- I would rather use self-service for simple questions/issues
  - Millennials/Gen Zers: 73%
  - Gen Xers: 69%
  - Silents/Baby Boomers: 59%

- I get annoyed if I’m targeted for an ad for something I’ve already bought
  - Millennials/Gen Zers: 56%
  - Gen Xers: 54%
  - Silents/Baby Boomers: 51%

- I generally ignore communications from companies unless they’re personalized for me
  - Millennials/Gen Zers: 50%
  - Gen Xers: 45%
  - Silents/Baby Boomers: 41%

- I expect companies to communicate with me in real time
  - Millennials/Gen Zers: 73%
  - Gen Xers: 72%
  - Silents/Baby Boomers: 69%

- I can generally find whatever I need from a company in three clicks or less
  - Millennials/Gen Zers: 49%
  - Gen Xers: 47%
  - Silents/Baby Boomers: 36%

- I will take my business to Amazon if a company can’t match their shipping speed and cost
  - Millennials/Gen Zers: 65%
  - Gen Xers: 59%
  - Silents/Baby Boomers: 49%

- I can generally solve a complex issue by speaking to one person
  - Millennials/Gen Zers: 67%
  - Gen Xers: 67%
  - Silents/Baby Boomers: 62%

- Companies generally provide tailored engagement based on past interactions
  - Millennials/Gen Zers: 54%
  - Gen Xers: 52%
  - Silents/Baby Boomers: 42%

- Companies generally provide connected experiences
  - Millennials/Gen Zers: 58%
  - Gen Xers: 54%
  - Silents/Baby Boomers: 43%

- I often have to repeat or re-explain information to different representatives
  - Millennials/Gen Zers: 67%
  - Gen Xers: 67%
  - Silents/Baby Boomers: 62%
Customers Who Say the Following, by Customer Type

<table>
<thead>
<tr>
<th>Customer Experience</th>
<th>Consumers</th>
<th>Business Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I expect to find whatever I need from a company in three clicks or less</td>
<td>52%</td>
<td>65%</td>
</tr>
<tr>
<td>I won’t buy from a company that can’t ship quickly and cheaply</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>I expect to solve complex issues by speaking to one person</td>
<td>77%</td>
<td>79%</td>
</tr>
<tr>
<td>I expect tailored engagement based on past interactions</td>
<td>60%</td>
<td>75%</td>
</tr>
<tr>
<td>I expect connected experiences</td>
<td>65%</td>
<td>79%</td>
</tr>
<tr>
<td>I expect representatives of a company to have the same information about me</td>
<td>69%</td>
<td>79%</td>
</tr>
<tr>
<td>I would rather use self-service for simple questions/issues</td>
<td>67%</td>
<td>72%</td>
</tr>
<tr>
<td>I get annoyed if I’m targeted for an ad for something I’ve already bought</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>I generally ignore communications from companies unless they’re personalized for me</td>
<td>45%</td>
<td>49%</td>
</tr>
<tr>
<td>I expect companies to communicate with me in real time</td>
<td>68%</td>
<td>80%</td>
</tr>
<tr>
<td>I can generally find whatever I need from a company in three clicks or less</td>
<td>40%</td>
<td>56%</td>
</tr>
<tr>
<td>I will take my business to Amazon if a company can’t match their shipping speed and cost</td>
<td>56%</td>
<td>66%</td>
</tr>
<tr>
<td>I can generally solve a complex issue by speaking to one person</td>
<td>63%</td>
<td>71%</td>
</tr>
<tr>
<td>Companies generally provide tailored engagement based on past interactions</td>
<td>44%</td>
<td>64%</td>
</tr>
<tr>
<td>Companies generally provide connected experiences</td>
<td>47%</td>
<td>67%</td>
</tr>
<tr>
<td>I often have to repeat or re-explain information to different representatives</td>
<td>65%</td>
<td>69%</td>
</tr>
</tbody>
</table>
### Customers Who Say the Following, by Customer Type

<table>
<thead>
<tr>
<th>Statement</th>
<th>Consumers %</th>
<th>Business Buyers %</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer different channels depending on context (i.e., where I am and what I’m doing)</td>
<td>76%</td>
<td>83%</td>
</tr>
<tr>
<td>I prefer different devices depending on context (e.g., where I am and what I’m doing)</td>
<td>70%</td>
<td>81%</td>
</tr>
<tr>
<td>I have used multiple channels to start and complete a single transaction</td>
<td>67%</td>
<td>79%</td>
</tr>
<tr>
<td>I have used multiple devices to start and complete a single transaction</td>
<td>60%</td>
<td>76%</td>
</tr>
<tr>
<td>I prefer digital channels over traditional ones</td>
<td>50%</td>
<td>65%</td>
</tr>
<tr>
<td>I won’t do business with a company if I can’t use my preferred channels</td>
<td>38%</td>
<td>44%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Channel</th>
<th>Consumers %</th>
<th>Business Buyers %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>61%</td>
<td>70%</td>
</tr>
<tr>
<td>In-person</td>
<td>57%</td>
<td>64%</td>
</tr>
<tr>
<td>Phone</td>
<td>53%</td>
<td>63%</td>
</tr>
<tr>
<td>Online chat/live support (e.g., popup windows on website)</td>
<td>40%</td>
<td>57%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>38%</td>
<td>55%</td>
</tr>
<tr>
<td>Online portals (e.g., self-service account information)</td>
<td>39%</td>
<td>53%</td>
</tr>
<tr>
<td>Online knowledge bases (e.g., self-service FAQs, searchable libraries)</td>
<td>37%</td>
<td>52%</td>
</tr>
<tr>
<td>Messenger apps (e.g., WhatsApp, Facebook Messenger)</td>
<td>33%</td>
<td>45%</td>
</tr>
<tr>
<td>Online forms</td>
<td>32%</td>
<td>46%</td>
</tr>
<tr>
<td>Social media</td>
<td>27%</td>
<td>45%</td>
</tr>
<tr>
<td>Text/SMS</td>
<td>27%</td>
<td>39%</td>
</tr>
<tr>
<td>Online communities (i.e., forums)</td>
<td>25%</td>
<td>42%</td>
</tr>
<tr>
<td>Voice assistants (e.g., Siri, Alexa)</td>
<td>15%</td>
<td>39%</td>
</tr>
</tbody>
</table>
## Appendix

### New Expectations Shift the Digital Transformation Playbook

#### Customers Who Say the Following, by Generation

<table>
<thead>
<tr>
<th>Statement</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I expect companies to provide new products/services more frequently than</td>
<td>73%</td>
<td>68%</td>
<td>57%</td>
</tr>
<tr>
<td>the past</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I expect the rate of innovation from companies to accelerate</td>
<td>73%</td>
<td>70%</td>
<td>59%</td>
</tr>
<tr>
<td>It takes more for a company to impress me with new products/services</td>
<td>67%</td>
<td>65%</td>
<td>53%</td>
</tr>
<tr>
<td>than ever before</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If a company doesn’t adapt to my changing expectations, it feels like</td>
<td>62%</td>
<td>61%</td>
<td>58%</td>
</tr>
<tr>
<td>they don’t care</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I will pay more for differentiated products</td>
<td>60%</td>
<td>50%</td>
<td>32%</td>
</tr>
<tr>
<td>I will pay more for a product or service that’s first to market</td>
<td>50%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>The way a company uses technology indicates how they operate in general</td>
<td>72%</td>
<td>67%</td>
<td>57%</td>
</tr>
<tr>
<td>I expect companies to use new technologies to create better experiences</td>
<td>80%</td>
<td>76%</td>
<td>65%</td>
</tr>
<tr>
<td>I expect companies to use existing technologies in new ways to create</td>
<td>78%</td>
<td>76%</td>
<td>65%</td>
</tr>
<tr>
<td>better experiences</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I’m open to the use of AI to improve my experiences</td>
<td>70%</td>
<td>63%</td>
<td>49%</td>
</tr>
<tr>
<td>AI will revolutionize how I interact with companies</td>
<td></td>
<td>66%</td>
<td>60%</td>
</tr>
<tr>
<td>I trust companies to use AI in a way that benefits me</td>
<td></td>
<td>61%</td>
<td>56%</td>
</tr>
<tr>
<td>AI will play as big of a role in my life as smartphones</td>
<td></td>
<td>60%</td>
<td>54%</td>
</tr>
<tr>
<td>AI is the most significant technology of my lifetime</td>
<td></td>
<td>53%</td>
<td>50%</td>
</tr>
<tr>
<td>I can think of an example of AI I use every day</td>
<td></td>
<td>40%</td>
<td>24%</td>
</tr>
<tr>
<td>Companies are transparent enough about how they use AI</td>
<td></td>
<td>46%</td>
<td>40%</td>
</tr>
<tr>
<td>Voice assistants are revolutionary</td>
<td></td>
<td>46%</td>
<td>59%</td>
</tr>
<tr>
<td>I would rather talk to my device than type in it</td>
<td></td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Voice assistants will play as big of a role in my life as smartphones</td>
<td></td>
<td>48%</td>
<td>47%</td>
</tr>
</tbody>
</table>
## New Expectations Shift the Digital Transformation Playbook

### Customers Who Say the Following, by Customer Type

<table>
<thead>
<tr>
<th>Statement</th>
<th>Consumers</th>
<th>Business Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I expect companies to provide new products/services more frequently than in the past</td>
<td>63%</td>
<td>77%</td>
</tr>
<tr>
<td>The way a company uses technology indicates how they operate in general</td>
<td>62%</td>
<td>78%</td>
</tr>
<tr>
<td>Connected devices have transformed or are transforming my expectations of companies</td>
<td>61%</td>
<td>75%</td>
</tr>
<tr>
<td>I want more connections between my devices</td>
<td>46%</td>
<td>71%</td>
</tr>
<tr>
<td>I think connected devices make my life easier*</td>
<td>73%</td>
<td>85%</td>
</tr>
</tbody>
</table>

* Base is respondents who use a connected device.
## Appendix

### Trust Becomes More Important, Yet More Elusive

#### Customers Who Say the Following, by Generation

<table>
<thead>
<tr>
<th>Statement</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm more loyal to companies I trust</td>
<td>89%</td>
<td>88%</td>
<td>89%</td>
</tr>
<tr>
<td>I won't buy from companies I don't trust</td>
<td>76%</td>
<td>79%</td>
<td>83%</td>
</tr>
<tr>
<td>It's harder than ever for a company to earn my trust</td>
<td>56%</td>
<td>55%</td>
<td>48%</td>
</tr>
<tr>
<td>I'm comfortable with relevant personal information being used in a transparent and beneficial manner</td>
<td>62%</td>
<td>60%</td>
<td>49%</td>
</tr>
<tr>
<td>Most companies aren't transparent about how they use my data</td>
<td>63%</td>
<td>62%</td>
<td>63%</td>
</tr>
<tr>
<td>Most companies don't use my data in a way that benefits me</td>
<td>56%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>I don't believe companies care about the security of my data</td>
<td>45%</td>
<td>39%</td>
<td>38%</td>
</tr>
</tbody>
</table>
Appendix
Trust Becomes More Important, Yet More Elusive

Customers Who Strongly Associate the Following with Trust, by Generation

- **HONESTY**:
  - Millennials/Gen Zers: 81%
  - Gen Xers: 77%
  - Silents/Baby Boomers: 73%

- **AUTHENTICITY**:
  - Millennials/Gen Zers: 61%
  - Gen Xers: 57%
  - Silents/Baby Boomers: 63%

- **CONFIDENCE**:
  - Millennials/Gen Zers: 62%
  - Gen Xers: 55%
  - Silents/Baby Boomers: 64%

- **SECURITY**:
  - Millennials/Gen Zers: 81%
  - Gen Xers: 77%
  - Silents/Baby Boomers: 73%

- **RELIABILITY**:
  - Millennials/Gen Zers: 78%
  - Gen Xers: 76%
  - Silents/Baby Boomers: 71%

- **ETHICS**:
  - Millennials/Gen Zers: 65%
  - Gen Xers: 64%
  - Silents/Baby Boomers: 64%

- **PRIVACY**:
  - Millennials/Gen Zers: 66%
  - Gen Xers: 71%
  - Silents/Baby Boomers: 72%

- **TRANSPARENCY**:
  - Millennials/Gen Zers: 66%
  - Gen Xers: 75%
  - Silents/Baby Boomers: 70%
## Trust Becomes More Important, Yet More Elusive

<table>
<thead>
<tr>
<th>Customers Who Say the Following, by Customer Type</th>
<th>Consumers</th>
<th>Business Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm more loyal to companies I trust</td>
<td>88%</td>
<td>90%</td>
</tr>
<tr>
<td>I won't buy from companies I don't trust</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>It's harder than ever for a company to earn my trust</td>
<td>51%</td>
<td>59%</td>
</tr>
<tr>
<td>I'm comfortable with relevant personal information being used in a transparent and beneficial manner</td>
<td>55%</td>
<td>66%</td>
</tr>
<tr>
<td>Most companies aren't transparent about how they use my data</td>
<td>63%</td>
<td>62%</td>
</tr>
<tr>
<td>Most companies don't use my data in a way that benefits me</td>
<td>55%</td>
<td>53%</td>
</tr>
<tr>
<td>I don't believe companies care about the security of my data</td>
<td>42%</td>
<td>39%</td>
</tr>
</tbody>
</table>
Customers Who Strongly Associate the Following with Trust, by Customer Type

- **Honesty**: 82% (Consumers), 81% (Business Buyers)
- **Authenticity**: 65% (Consumers), 59% (Business Buyers)
- **Security**: 77% (Consumers), 79% (Business Buyers)
- **Confidence**: 68% (Consumers), 58% (Business Buyers)
- **Reliability**: 75% (Consumers), 77% (Business Buyers)
- **Ethics**: 66% (Consumers), 64% (Business Buyers)
- **Privacy**: 73% (Consumers), 69% (Business Buyers)
- **Transparency**: 75% (Consumers), 76% (Business Buyers)
Appendix

Trust Becomes More Important, Yet More Elusive

Customers Who Strongly Associate the Following with Trust, by Country

<table>
<thead>
<tr>
<th>Country</th>
<th>AU/NZ</th>
<th>CA</th>
<th>FR</th>
<th>DE</th>
<th>HK</th>
<th>IN</th>
<th>IT</th>
<th>JP</th>
<th>SG</th>
<th>ES</th>
<th>CH</th>
<th>TH</th>
<th>GB/IE</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency</td>
<td>70%</td>
<td>68%</td>
<td>72%</td>
<td>65%</td>
<td>70%</td>
<td>68%</td>
<td>79%</td>
<td>54%</td>
<td>71%</td>
<td>78%</td>
<td>66%</td>
<td>82%</td>
<td>69%</td>
<td>67%</td>
</tr>
<tr>
<td>Security</td>
<td>77%</td>
<td>76%</td>
<td>76%</td>
<td>76%</td>
<td>71%</td>
<td>84%</td>
<td>77%</td>
<td>70%</td>
<td>77%</td>
<td>83%</td>
<td>75%</td>
<td>86%</td>
<td>78%</td>
<td>79%</td>
</tr>
<tr>
<td>Privacy</td>
<td>78%</td>
<td>77%</td>
<td>74%</td>
<td>74%</td>
<td>75%</td>
<td>82%</td>
<td>70%</td>
<td>63%</td>
<td>70%</td>
<td>74%</td>
<td>71%</td>
<td>79%</td>
<td>79%</td>
<td>79%</td>
</tr>
<tr>
<td>Confidence</td>
<td>55%</td>
<td>56%</td>
<td>82%</td>
<td>38%</td>
<td>46%</td>
<td>79%</td>
<td>67%</td>
<td>23%</td>
<td>62%</td>
<td>86%</td>
<td>71%</td>
<td>79%</td>
<td>53%</td>
<td>56%</td>
</tr>
<tr>
<td>Honesty</td>
<td>65%</td>
<td>85%</td>
<td>80%</td>
<td>74%</td>
<td>77%</td>
<td>86%</td>
<td>83%</td>
<td>55%</td>
<td>80%</td>
<td>83%</td>
<td>75%</td>
<td>86%</td>
<td>88%</td>
<td>87%</td>
</tr>
<tr>
<td>Authenticity</td>
<td>69%</td>
<td>57%</td>
<td>56%</td>
<td>52%</td>
<td>69%</td>
<td>70%</td>
<td>67%</td>
<td>49%</td>
<td>65%</td>
<td>64%</td>
<td>62%</td>
<td>61%</td>
<td>52%</td>
<td>64%</td>
</tr>
<tr>
<td>Ethics</td>
<td>73%</td>
<td>67%</td>
<td>59%</td>
<td>51%</td>
<td>61%</td>
<td>60%</td>
<td>60%</td>
<td>52%</td>
<td>71%</td>
<td>67%</td>
<td>56%</td>
<td>77%</td>
<td>64%</td>
<td>73%</td>
</tr>
<tr>
<td>Reliability</td>
<td>72%</td>
<td>72%</td>
<td>75%</td>
<td>76%</td>
<td>77%</td>
<td>76%</td>
<td>79%</td>
<td>77%</td>
<td>76%</td>
<td>83%</td>
<td>71%</td>
<td>84%</td>
<td>70%</td>
<td>73%</td>
</tr>
</tbody>
</table>
## Corporate Values Sway Buying Decisions

### Customers Who Say the Following, by Generation

<table>
<thead>
<tr>
<th>Statement</th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>A company's ethics matter more than they did a year ago</td>
<td>75%</td>
<td>72%</td>
<td>70%</td>
</tr>
<tr>
<td>I'm more loyal to companies with good ethics</td>
<td>82%</td>
<td>79%</td>
<td>78%</td>
</tr>
<tr>
<td>I won't buy from companies with poor ethics</td>
<td>67%</td>
<td>67%</td>
<td>70%</td>
</tr>
<tr>
<td>I'm more loyal to companies I trust</td>
<td>89%</td>
<td>89%</td>
<td>89%</td>
</tr>
<tr>
<td>I believe emerging technology can make the world a better place</td>
<td>75%</td>
<td>71%</td>
<td>64%</td>
</tr>
<tr>
<td>I believe companies are responsible for ensuring they use technology ethically</td>
<td>87%</td>
<td>89%</td>
<td>89%</td>
</tr>
<tr>
<td>I want companies to advocate for equal rights</td>
<td>78%</td>
<td>76%</td>
<td>75%</td>
</tr>
<tr>
<td>I expect companies to clearly state their position on equal rights</td>
<td>73%</td>
<td>71%</td>
<td>68%</td>
</tr>
<tr>
<td>I'm more loyal to companies that value equality</td>
<td>77%</td>
<td>72%</td>
<td>69%</td>
</tr>
<tr>
<td>I won't buy from companies that don't value equality</td>
<td>57%</td>
<td>54%</td>
<td>55%</td>
</tr>
<tr>
<td>I think companies are responsible for ensuring equal access to technology-driven opportunities</td>
<td>78%</td>
<td>76%</td>
<td>75%</td>
</tr>
<tr>
<td>I think emerging technology will provide opportunity to more people</td>
<td>72%</td>
<td>67%</td>
<td>59%</td>
</tr>
<tr>
<td>I'm worried about equal opportunity as technology advances</td>
<td>62%</td>
<td>55%</td>
<td>49%</td>
</tr>
<tr>
<td>A company's sustainability practices matter more than they did a year ago</td>
<td>76%</td>
<td>74%</td>
<td>71%</td>
</tr>
<tr>
<td>I actively seek to buy from philanthropic companies</td>
<td>61%</td>
<td>55%</td>
<td>50%</td>
</tr>
<tr>
<td>I actively seek to buy from environmentally sustainable companies</td>
<td>70%</td>
<td>70%</td>
<td>58%</td>
</tr>
</tbody>
</table>
## Appendix

### Corporate Values Sway Buying Decisions

<table>
<thead>
<tr>
<th>Customers Who Say the Following, by Customer Type</th>
<th>Consumers</th>
<th>Business Buyers</th>
</tr>
</thead>
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<tr>
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<td>84%</td>
</tr>
<tr>
<td>I won’t buy from companies with poor ethics</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>I’m more loyal to companies I trust</td>
<td>88%</td>
<td>90%</td>
</tr>
<tr>
<td>I believe emerging technology can make the world a better place</td>
<td>67%</td>
<td>79%</td>
</tr>
<tr>
<td>I believe companies are responsible for ensuring they use technology ethically</td>
<td>88%</td>
<td>89%</td>
</tr>
<tr>
<td>I want companies to advocate for equal rights</td>
<td>75%</td>
<td>79%</td>
</tr>
<tr>
<td>I expect companies to clearly state their position on equal rights</td>
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<td>I’m more loyal to companies that value equality</td>
<td>72%</td>
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</tr>
<tr>
<td>I won’t buy from companies that don’t value equality</td>
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<td>57%</td>
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<tr>
<td>I think companies are responsible for ensuring equal access to technology-driven opportunities</td>
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<td>81%</td>
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<tr>
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<td>54%</td>
<td>61%</td>
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<tr>
<td>A company’s sustainability practices matter more than they did a year ago</td>
<td>72%</td>
<td>78%</td>
</tr>
<tr>
<td>I actively seek to buy from philanthropic companies</td>
<td>52%</td>
<td>67%</td>
</tr>
<tr>
<td>I actively seek to buy from environmentally sustainable companies</td>
<td>61%</td>
<td>75%</td>
</tr>
<tr>
<td>I think companies are responsible for ensuring equal access to technology-driven opportunities</td>
<td>75%</td>
<td>81%</td>
</tr>
</tbody>
</table>
### Customer Industry Rankings for Experience, by Generation*

<table>
<thead>
<tr>
<th></th>
<th>Millennials/Gen Zers</th>
<th>Gen Xers</th>
<th>Silents/Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Bottom Ranking</td>
<td>Top Ranking</td>
<td>Bottom Ranking</td>
</tr>
<tr>
<td></td>
<td>Industries for Experience</td>
<td>for Experience</td>
<td>Industries for Experience</td>
</tr>
<tr>
<td>Technology</td>
<td>7%</td>
<td>50%</td>
<td>8%</td>
</tr>
<tr>
<td>Travel, transportation,</td>
<td>18%</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td>and hospitality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>20%</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>Consumer goods</td>
<td>16%</td>
<td>32%</td>
<td>13%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>30%</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Nonprofit</td>
<td>20%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Financial services</td>
<td>36%</td>
<td>22%</td>
<td>38%</td>
</tr>
<tr>
<td>Education</td>
<td>24%</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>Media and communications</td>
<td>29%</td>
<td>24%</td>
<td>33%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>20%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Automotive</td>
<td>20%</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>Government</td>
<td>60%</td>
<td>9%</td>
<td>60%</td>
</tr>
</tbody>
</table>

* Respondents were asked to rank the top three and bottom three industries by experience.
### Customer Industry Rankings for Experience, by Country*

<table>
<thead>
<tr>
<th>Industry</th>
<th>Top</th>
<th>Bottom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>36%</td>
<td>10%</td>
</tr>
<tr>
<td>Travel, transportation, and hospitality</td>
<td>42%</td>
<td>17%</td>
</tr>
<tr>
<td>Retail</td>
<td>44%</td>
<td>14%</td>
</tr>
<tr>
<td>Consumer goods</td>
<td>40%</td>
<td>11%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Nonprofit</td>
<td>26%</td>
<td>14%</td>
</tr>
<tr>
<td>Financial services</td>
<td>13%</td>
<td>51%</td>
</tr>
<tr>
<td>Education</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Media and communications</td>
<td>15%</td>
<td>39%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Automotive</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>Government</td>
<td>10%</td>
<td>63%</td>
</tr>
</tbody>
</table>

* 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%

### 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%