

SECOND EDITION



# State of the Connected Customer

Insights from 6,700+ consumers  
and business buyers on the  
intersection of experience,  
technology, and trust

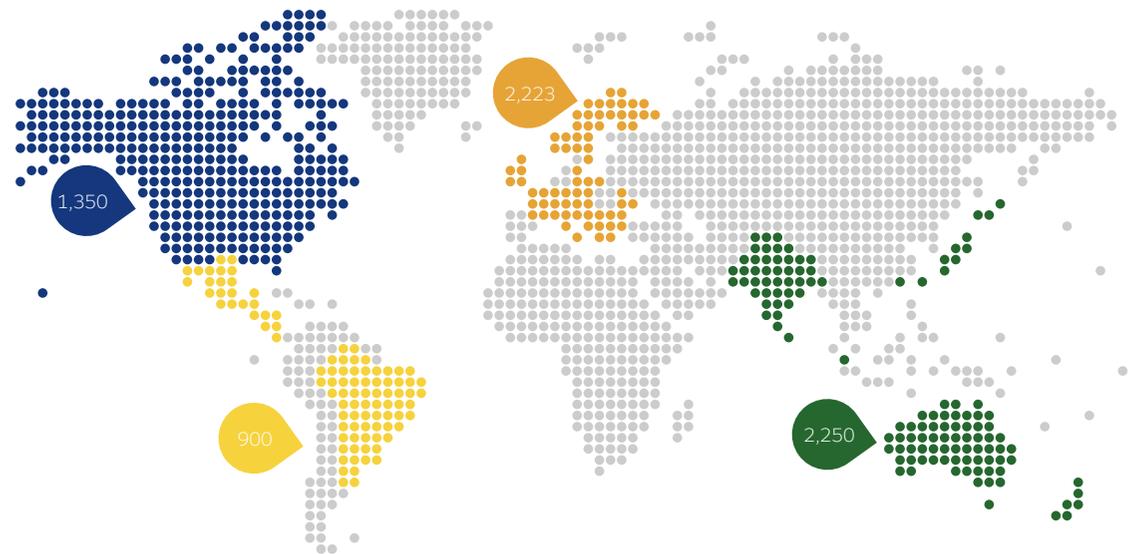


For this second edition “State of the Connected Customer” report, Salesforce Research surveyed over 6,700 consumers and business buyers worldwide to discover:

- How customers’ expectations of companies are changing
- Which emerging technologies are influencing the future of customer experience
- Why customer trust is increasingly important, and how companies can foster it

Data in this report is from a double-blind survey conducted from March 26–April 12, 2018, that generated responses from 6,723 individuals in Australia/New Zealand, Brazil, Canada, France, Germany, Hong Kong, India, Japan, Mexico, the Netherlands, the Nordics, Singapore, the United Kingdom, and the United States.

All respondents are third-party panelists (not limited to Salesforce customers). See page 56 for detailed respondent demographics.



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

In this report, we examine survey results from three primary groups:

## Consumers

Those reporting on their interactions with companies when purchasing for themselves

## Business Buyers

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

## Customers

Aggregated consumers and business buyers

Due to rounding, not all percentages may add to the sum total. All comparison calculations are made from total numbers (not rounded numbers).



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Rising generations take for granted that they can order almost anything by just talking to a device. But their parents remember when mail-order catalogs were the norm. Suffice to say, technology is raising customer standards at a breakneck pace.

For businesses, there's more focus than ever on going beyond the expected product or service, to deliver a customer experience that truly differentiates.

But while expectations for personalized, connected experiences are soaring, trust in companies to responsibly handle the data they require is bottoming out.

This report examines the evolution of these expectations, the technology that's driving them, and the balance of trust between customers and companies.

## 01 | Customer Expectations Hit All-Time Highs

(See page 6)

With more choice, more access to information, and less incentive to be loyal, today's customers are firmly in control of their relationships with companies. Consumers and business buyers alike seek differentiated experiences based on trust and understanding, and will shop around to find them. **Eighty percent of customers say the experience a company provides is as important as its products and services.**

## 02 | Companies Face a New Connected Mandate

(See page 10)

From product recommendations to proactive service, customers expect engagement that's uniquely personalized. What's more, customers are looking for interactions that are connected and contextualized at every turn. **Seventy percent of customers say connected processes are very important to winning their business.**

## 03 | Technology Sets New Benchmarks for Innovation

(See page 15)

As technology evolves at a head-spinning pace, customers have been conditioned to expect newer and better experiences. Customers are far more likely to view various emerging technologies as revolutionary, rather than hyped, with artificial intelligence (AI) playing an increasingly prominent role in their daily lives. **Fifty-six percent of customers actively seek to buy from the most innovative companies.**

## 04 | Customers Balance Personalization and Privacy Amid a Crisis of Trust

(See page 19)

Delivering personalized experiences requires a data-driven, 360-degree view – but more than half of respondents are uncomfortable with how their data is used. Customers say companies can earn their trust by taking certain steps, such as giving them control over how their data is applied, and being transparent with how it's used. **Eighty-six percent of customers are more likely to trust companies with their relevant information if they explain how it provides a better experience.**

# 01 Customer Expectations Hit All-Time Highs

Tethered to their smartphones and accustomed to nonstop innovation, today's consumers and business buyers are more informed and less loyal than their predecessors. In this era of exponentially disruptive technological change, often referred to as the Fourth Industrial Revolution, products and services that are cutting-edge

one day are outdated the next. In this context, the experience a company offers is increasingly its differentiator. But the scope of customer experience is changing, too. To win hearts and wallets, companies must not only deliver amazing marketing, sales, ecommerce, and service interactions, but also prove that they have the customers' best interests in mind.

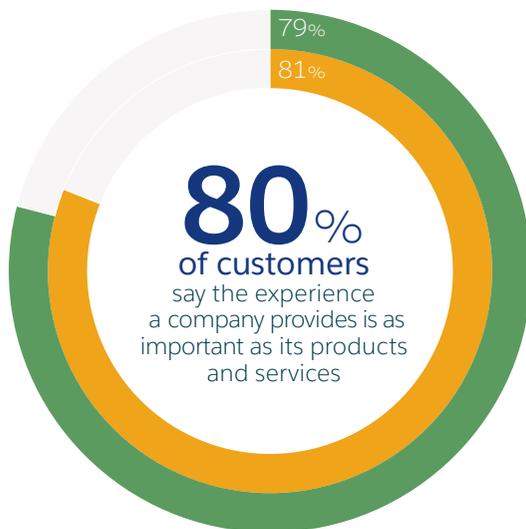
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**A STAGGERING 95% OF CUSTOMERS SAY TRUSTING A COMPANY INCREASES THEIR LOYALTY.**

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## Customers Push Companies to Do Better

■ Consumers      ■ Business Buyers



Customers expect a lot from companies, but don't have faith in them to deliver – much less in a principled fashion. About half of customers say most companies fall short of their expectations for great experiences. This would be troubling enough, but there are signs of an even deeper discontent; nearly six in 10 consumers don't believe companies have their best interests in mind.

The reality is that today's customers expect companies to understand and care about them as individuals, and treat them accordingly.

**76% OF CUSTOMERS EXPECT COMPANIES TO UNDERSTAND THEIR NEEDS AND EXPECTATIONS.**

## Companies Are Missing the Mark on Experience

■ Consumers ■ Business Buyers



The ripple effect of a single bad experience goes beyond one lost sale. **Fifty-seven percent of customers have stopped buying from a company because a competitor provided a better experience.** What's more, 62% of customers say they share bad experiences with others. With the proliferation of peer review sites and social media, this practice can inflict widespread reputational damage.

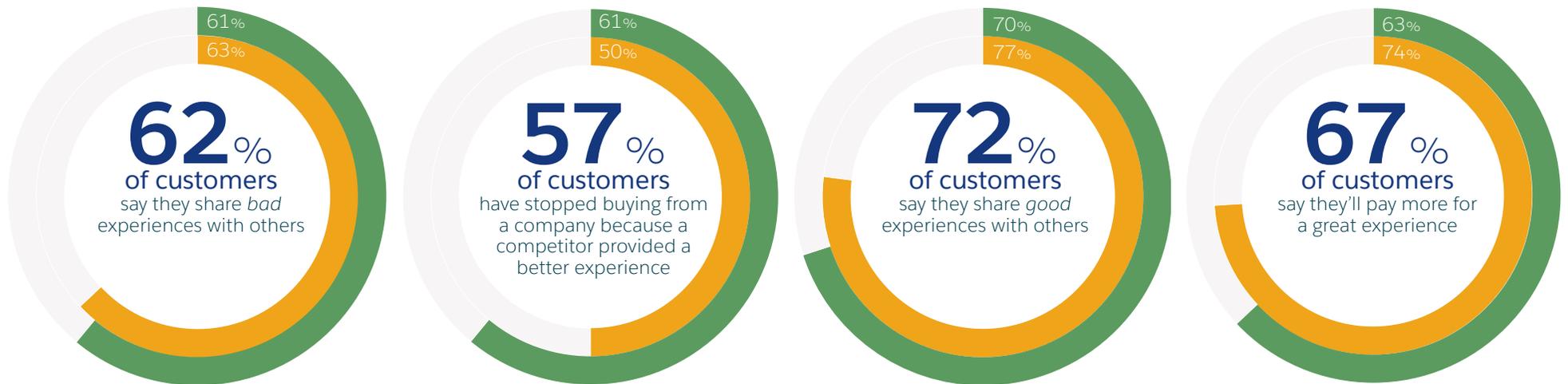
But this new dynamic is not all doom and gloom. **Seventy-two percent of customers share good experiences with others – a full 10% more than those that share the negative.**

**76% OF CUSTOMERS SAY IT'S EASIER THAN EVER TO TAKE THEIR BUSINESS ELSEWHERE.**

Two-thirds of customers will even pay a premium to companies that offer superior experiences, thereby introducing not just competitive differentiation, but increased or even new revenue streams.

## Experience Impacts the Bottom Line, for Better or Worse

■ Consumers   ■ Business Buyers



# SPOTLIGHT

## B2B Expectations Mirror B2C Standards

Naturally, business buyers also have personal lives as consumers – and their expectations as consumers have seeped into their professional world.

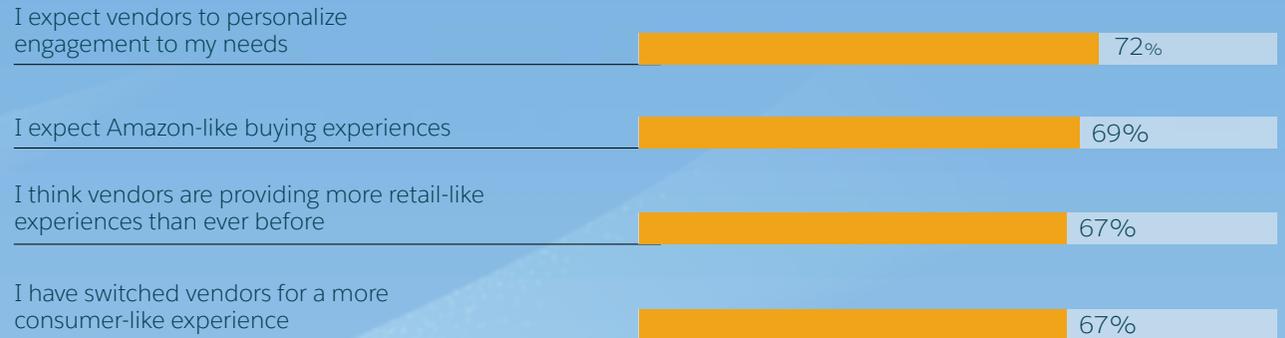
**82% OF BUSINESS BUYERS WANT THE SAME EXPERIENCE AS WHEN THEY'RE BUYING FOR THEMSELVES.**

At a time when personalized recommendations, proactive engagement, and deeply relevant content are table stakes, more than seven in 10 business buyers expect vendors to personalize engagement to their needs. And for 84% of business buyers, trust is a critical factor in choosing vendors.

To put a fine point on this convergence of B2C and B2B worlds, 69% of business buyers expect an Amazon-like business buying experience. However, only 27% of business buyers say companies generally excel at meeting their standards for an overall experience, signaling ample room for improvement.

### Business Buyer Expectations Get Consumerized

Percentage of Business Buyers Who Agree with the Following



See appendix page 44 for generational breaks.

Today's customers want to be understood and respected as individuals. **Eighty-four percent of customers say being treated like a person, not a number, is very important to winning their business.**

For teams accustomed to owning only one stage of the customer journey, it's a tricky proposition. Customers judge companies based on their experience as a whole – not just interactions with individual departments – and they expect consistency.

**70% OF CUSTOMERS SAY CONNECTED PROCESSES – SUCH AS SEAMLESS HANDOFFS OR CONTEXTUALIZED ENGAGEMENT BASED ON EARLIER INTERACTIONS – ARE VERY IMPORTANT TO WINNING THEIR BUSINESS.**

Today's customers seek contextualized experiences – meaning their engagement with a company reflects an understanding of past actions, product usage, and a myriad of other factors. Yet, 37% of customers feel less connected to companies than they did two years ago.

## Connected Customers Demand Connected Journeys

Percentage of Customers Who Say the Following Are Very Important to Winning Their Business

■ All Customers ■ Consumers ■ Business Buyers



Connected processes



Understanding how they use products/services



Instant, on-demand engagement



What experiences are customers looking for before they even make a purchase? Many say that user-generated content – such as product reviews and photos from other customers – is important.

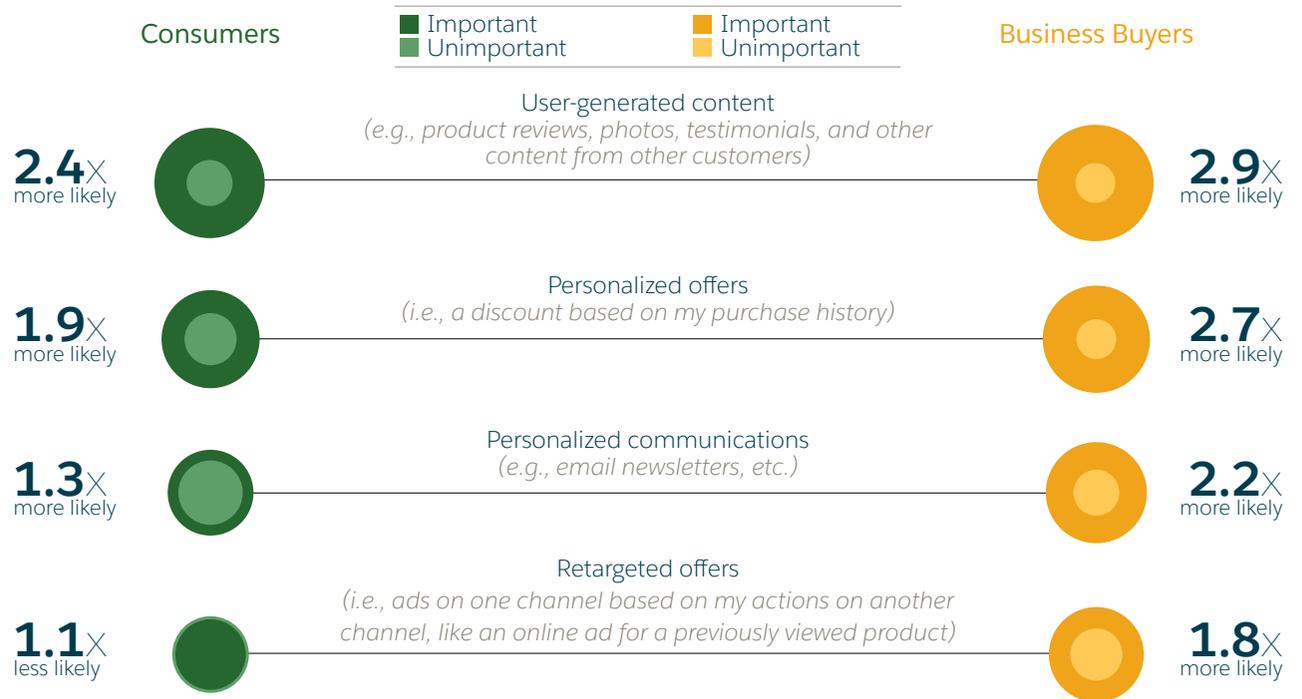
Personalization is another common thread that customers say is important. Even if a customer hasn't interacted with a company, they still want to feel known. Customers are 2.1x more likely to view personalized offers as important, versus unimportant.

**59% OF CUSTOMERS SAY TAILORED ENGAGEMENT BASED ON PAST INTERACTIONS IS VERY IMPORTANT TO WINNING THEIR BUSINESS.**

One area where business buyers differ from consumers is advertising. Business buyers place more importance on retargeted offers and personalized cross-channel ads than do consumers.

## Before They Buy, Marketing Personalization Matters

Likelihood of Customers Rating Each Quality as Important vs. Unimportant



Respondents were not required to rate a quality as important or unimportant. Data is based off respondents who elected to rate a quality as such. Not a complete list. See appendix page 46 for a full list broken by generational segmentations.



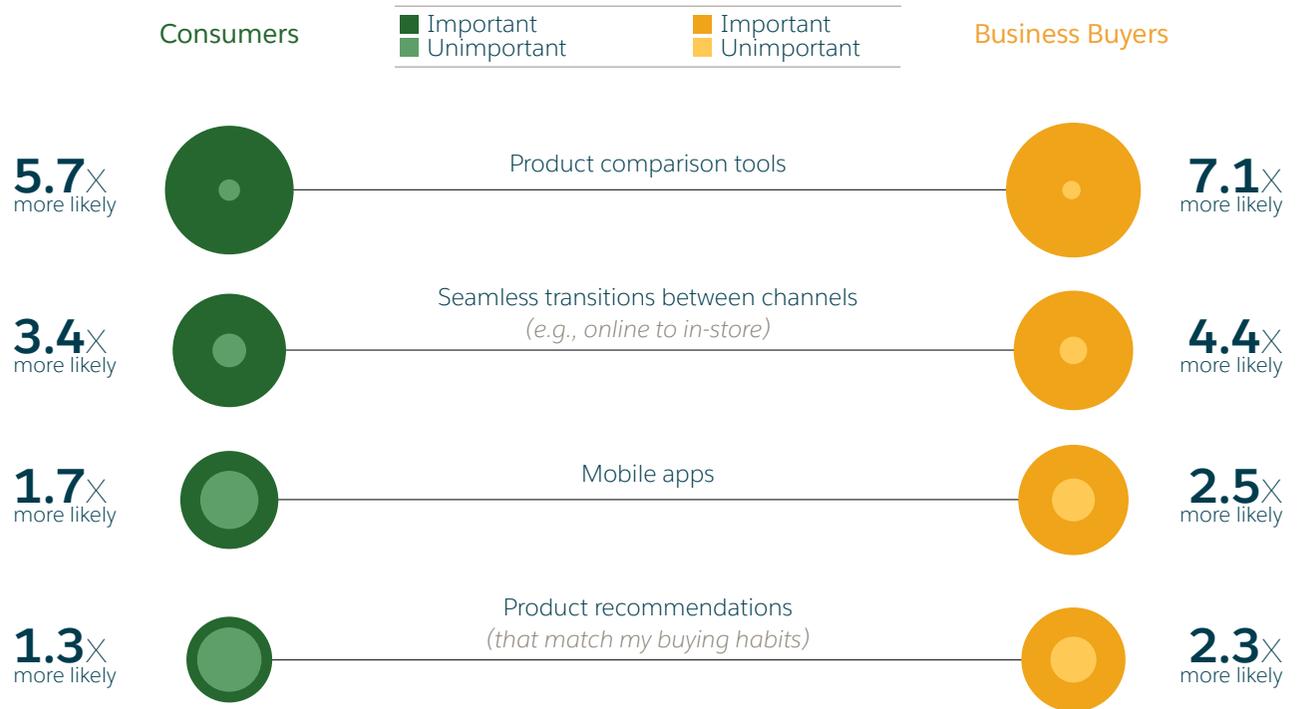
When it comes time to buy, today’s customers expect more than knowledgeable salespeople and a quick and easy checkout. Increasingly drawn to ecommerce sites, they value product comparison tools as well as mobile apps. On top of it all, they want to move seamlessly between various digital and offline channels, often browsing on one in the morning only to close the deal on another in the evening.

**CUSTOMERS ARE 3.7x MORE LIKELY TO VIEW SEAMLESS TRANSITIONS BETWEEN CHANNELS AS IMPORTANT, VERSUS UNIMPORTANT.**

With their professional reputations – and often large sums of money – at stake, business buyers have set the bar even higher. **Seventy-eight percent of business buyers seek salespeople that act as trusted advisors with knowledge of their needs and industry.** Business buyers are more likely than consumers to value product recommendations and mobile apps – a testament to the blurring lines between B2C and B2B behavior.

## When They Buy, Customers Seek Ease, Seamlessness, and Consultants

Likelihood of Customers Rating Each Quality as Important vs. Unimportant



Respondents were not required to rate a quality as important or unimportant. Data is based off respondents who elected to rate a quality as such. Not a complete list. See appendix page 46 for a full list broken by generational segmentations.

Customer service isn't just a reactionary cost center – it's a core element of differentiated customer experience. To meet current standards, service must be quick, readily available anywhere, and even proactive.

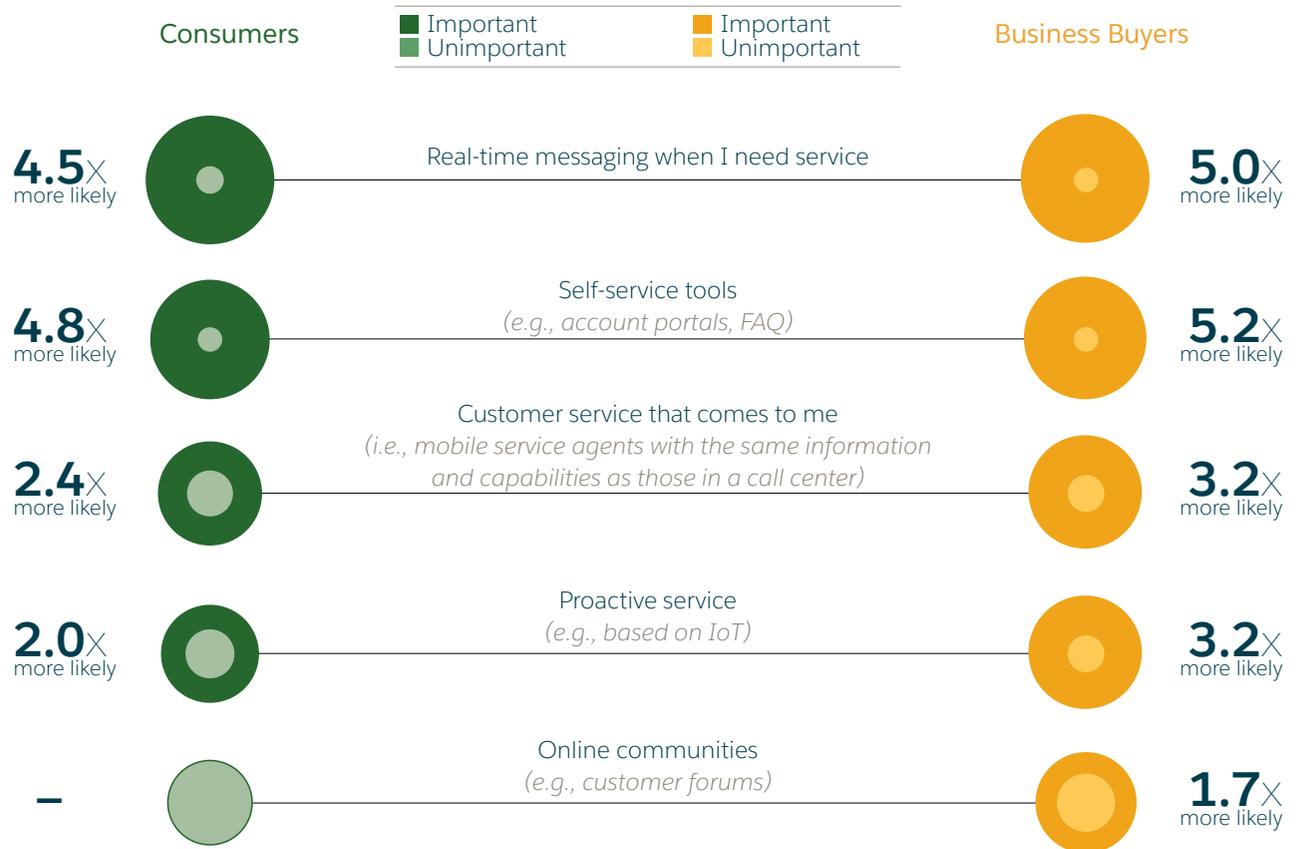
Increasingly unfamiliar with the concept of “waiting,” customers are keen on self-service tools that empower them to find quick answers on their own, when they do need more personalized help, they're not apt to wait on hold. **Customers are 4.7x more likely to view real-time messaging as important versus unimportant.**

Despite this trend, there will always be instances when nothing but a human touch will do. Consumers, in particular, expect empowered service reps armed with decision-making authority and a full understanding of their unique journeys. Even customer service that comes to them – such as via field agents – is increasingly important, particularly to business buyers.

**70% OF CUSTOMERS SAY SERVICE AGENTS' AWARENESS OF SALES INTERACTIONS IS VERY IMPORTANT TO KEEPING THEIR BUSINESS.**

## After They Buy, Customers Seek Service Beyond the Call Center

Likelihood of Customers Rating Each Quality as Important vs. Unimportant



Respondents were not required to rate a quality as important or unimportant. Data is based off respondents who elected to rate a quality as such. Not a complete list. See appendix page 46 for a full list broken by generational segmentations.

# SPOTLIGHT

## Customers Flock to a Growing Roster of Channels

As options for communicating multiply, many companies struggle to prioritize the channels they invest in. If younger generations point the way to preference trends, however, social, online communities, and voice assistants are critical. Sixty-seven percent of millennials and Gen Zers use voice-activated personal assistants like Siri and Alexa to connect with companies – 1.7x more than traditionalists and baby boomers who do the same.

**In all, the average customer uses 10 channels to communicate with companies, and lists six of those channels as preferred.**

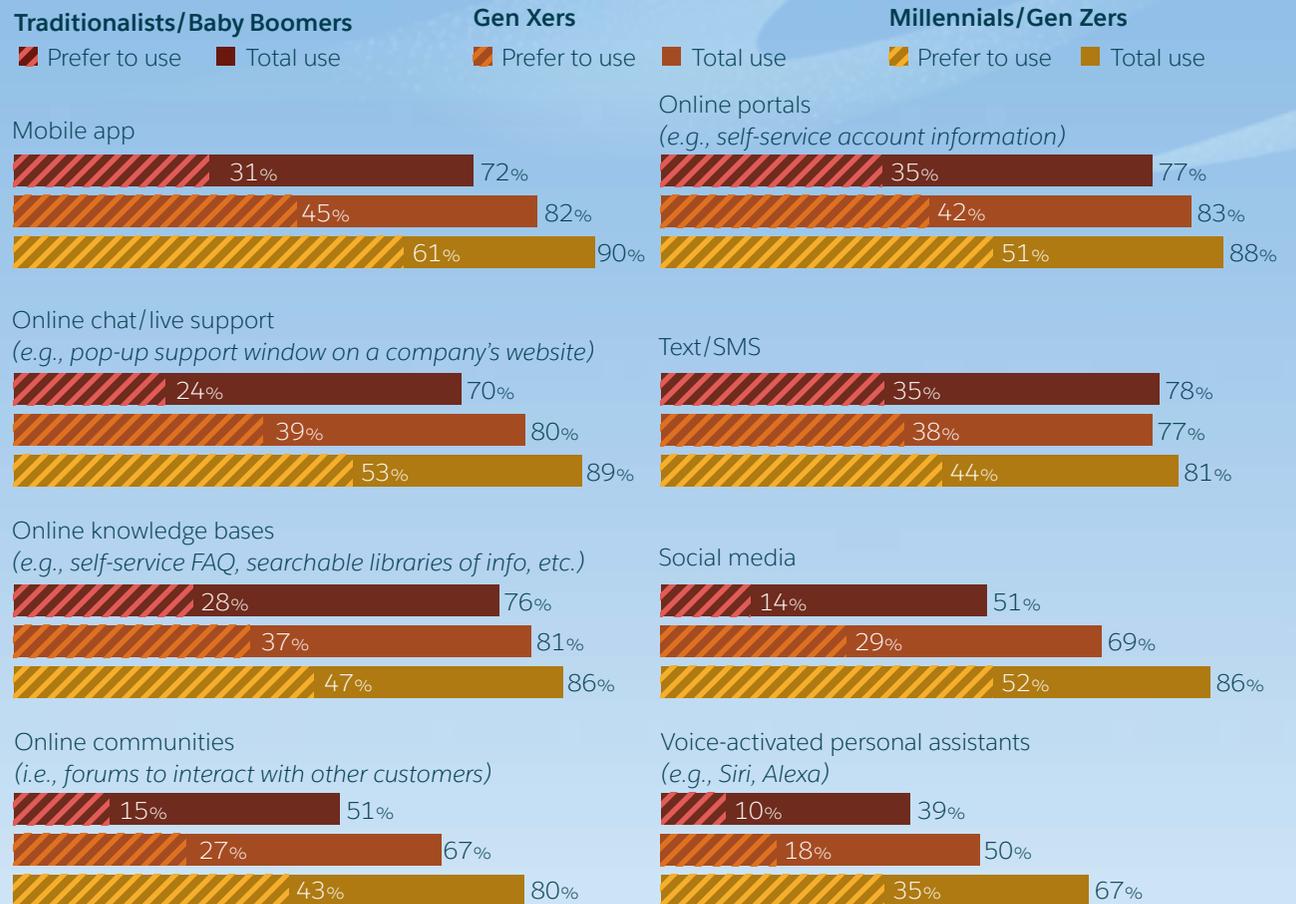
Unsurprisingly, millennials and Gen Zers are the most omni-channel generation, using an average of 11 channels, versus nine for traditionalists and baby boomers.

Yet, members of older generations are hardly Luddites. Seventy-two percent of traditionalists and baby boomers use mobile apps, for example, and 78% use text/SMS to communicate with companies.

And as the consumer goes digital, so does the business buyer. **Sixty-seven percent of business buyers prefer to buy through digital channels.**

### Use of Digital Channels Spans Generations

Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



Not a complete list. See appendix page 47 for full channel use and preference data, including all customer, consumer, and business buyer segmentations.



In recent years, the word “innovation” has been everywhere – but actually delivering it is a different story. A new crop of capabilities, such as AI, continues to raise the bar on what’s seen as innovative. And for a majority of customers, innovation impacts purchasing habits.

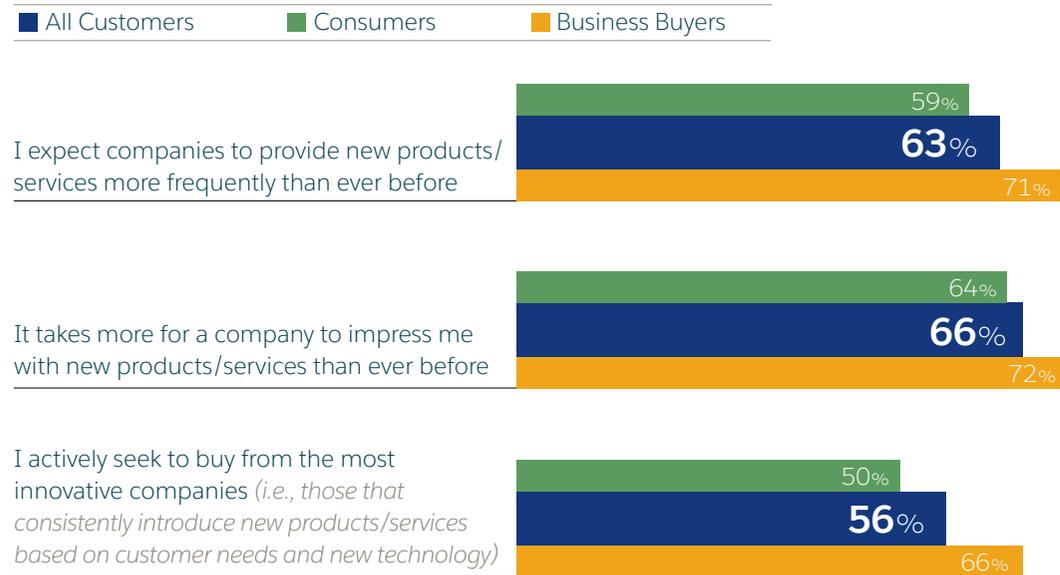
**56% PERCENT OF CUSTOMERS (INCLUDING 66% OF BUSINESS BUYERS) ACTIVELY SEEK TO BUY FROM THE MOST INNOVATIVE COMPANIES.**

There was a time when the mere presence on a social channel or existence of a mobile app would satisfy demands – but no more. Fifty-nine percent of customers say companies need cutting-edge digital experiences to keep their business.

**71% OF CUSTOMERS SAY THEY BUY PRODUCTS AND SERVICES THEY DIDN'T KNOW WOULD EXIST FIVE YEARS AGO.**

## Innovation Comes Standard for the Connected Customer

Percentage of Customers Who Agree with the Following



Which technologies are driving higher expectations for innovation? Smartphones, social media, and other entrenched technologies that created our “always-on” culture are only the tip of the iceberg.

In the eyes of customers, new capabilities fueled by AI, the Internet of Things (IoT), and other emerging technologies are far more likely to be seen as revolutionary versus insignificant.

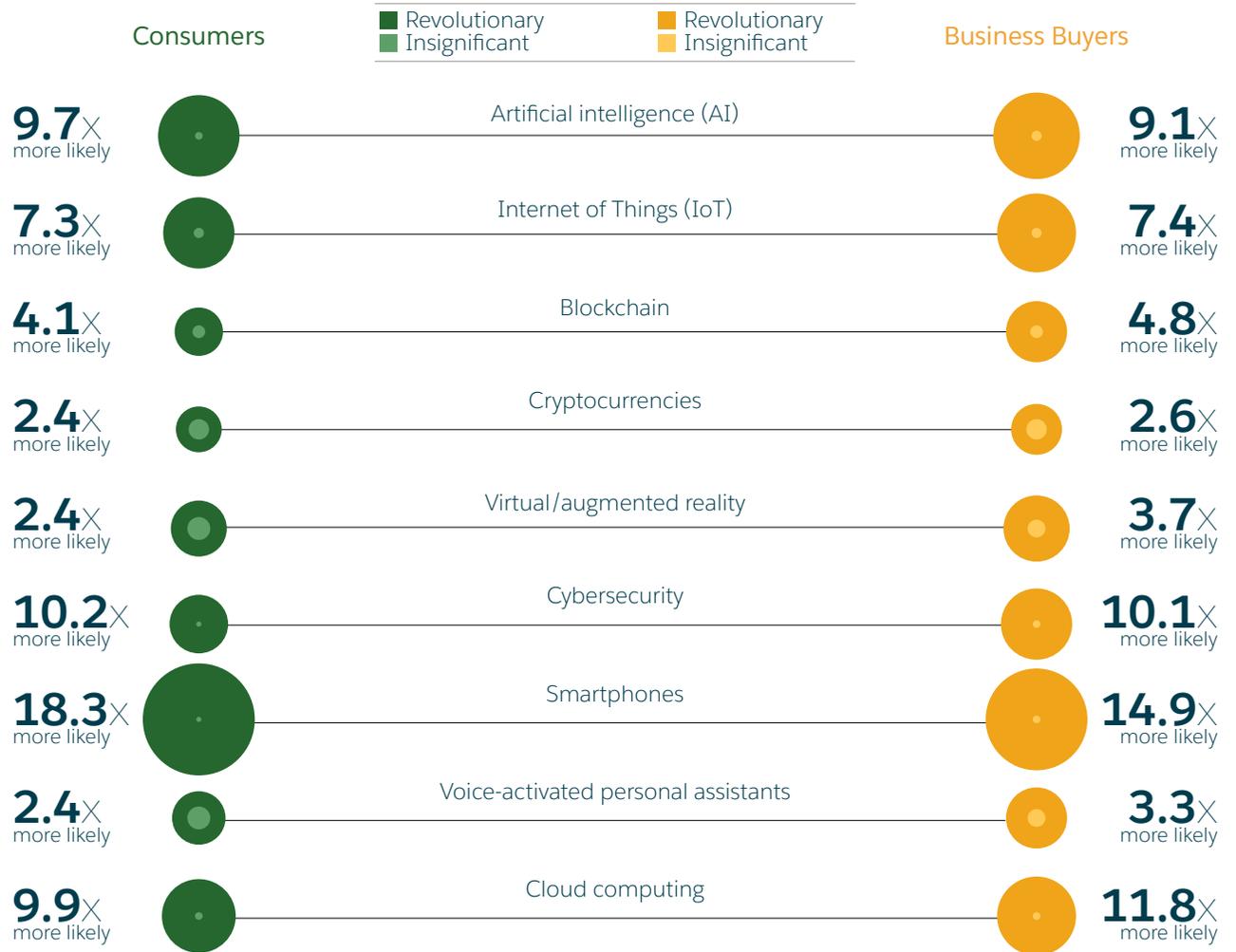
**CUSTOMERS ARE 9.5x MORE LIKELY TO VIEW AI AS REVOLUTIONARY VERSUS INSIGNIFICANT.**

While consumers and business buyers generally see eye to eye on the impact of various technologies, there are some notable differences. Consumers, for example, put greater stock in the revolutionary impact of smartphones, while business buyers are more wowed by voice-activated personal assistants and cloud computing.



## Modern Technology Advances Are Seen as Revolutionary, Not Hype

Likelihood of Customers Rating Each Technology as Revolutionary vs. Insignificant



Respondents were not required to rate a technology as revolutionary or insignificant. Data is based off respondents who elected to rate a technology as such. Not a complete list. See appendix page 51 for a full list broken by consumer and business buyer segmentations.

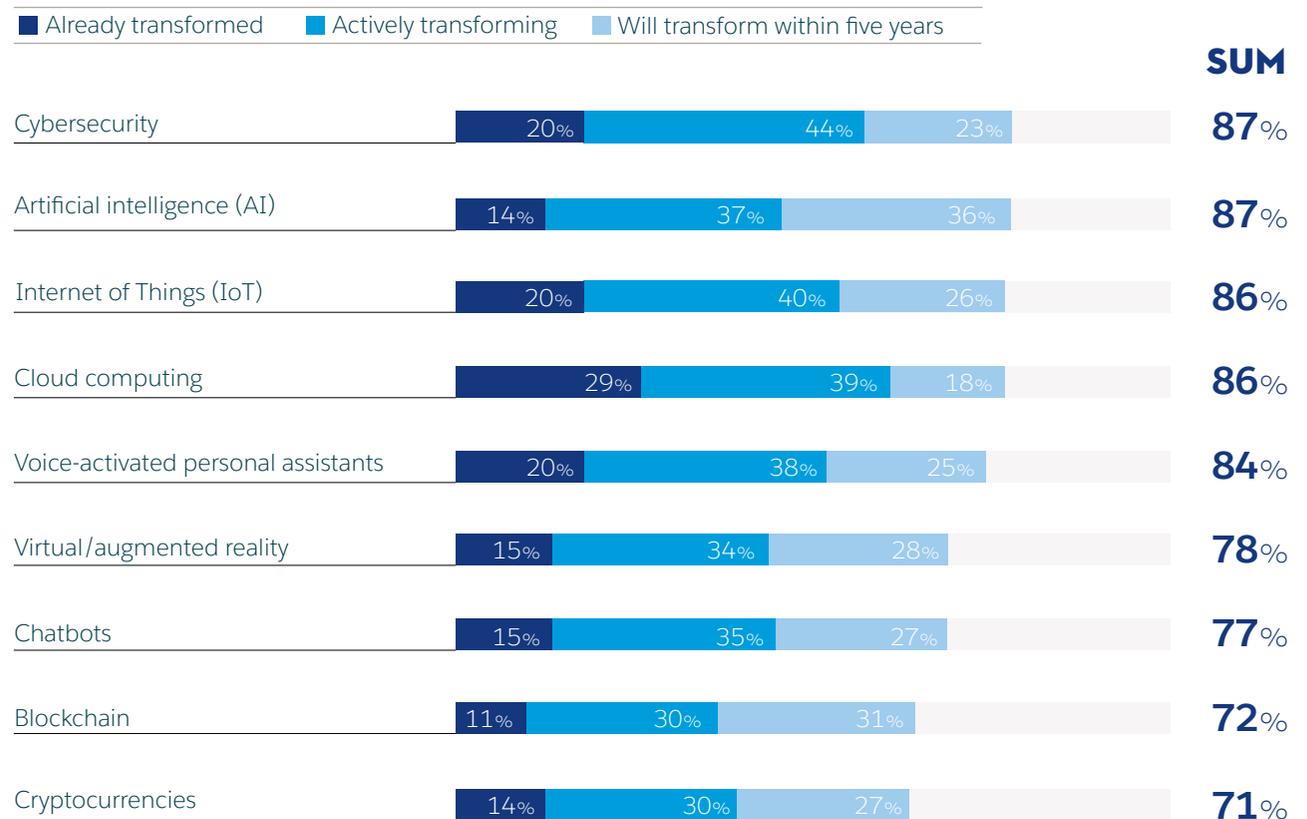
Most customers believe that these technologies – and the differentiated experiences they produce – will transform their interactions with companies in the very near term.

In fact, a majority of customers say their expectations are *already* impacted by up-and-coming technologies like the IoT (60%), voice-activated personal assistants (59%), and AI (51%). A nod to the role of trust in today’s customer dynamic, 64% say cybersecurity is transforming their expectations. Even blockchain, which puts up the lowest numbers, is expected to pack a punch; 41% of customers say it has or is actively transforming their expectations.

On average, 56% of consumers say a given technology is transforming their expectations. That figure rises to 63% for business buyers, who are more likely to experience an impact from virtual/augmented reality (54%), cryptocurrencies (50%), and blockchain (51%), in particular.

## The Fourth Industrial Revolution Is in Full Swing

Percentage of Customers Who Believe the Following Technologies Will Transform Their Expectations of Companies



Not a complete list. See appendix page 49 for full data, including all customer, consumer, and business buyer segmentations. Percents may not add to the sum total due to rounding.

# SPOTLIGHT

## Customers Have a Bright Outlook on AI

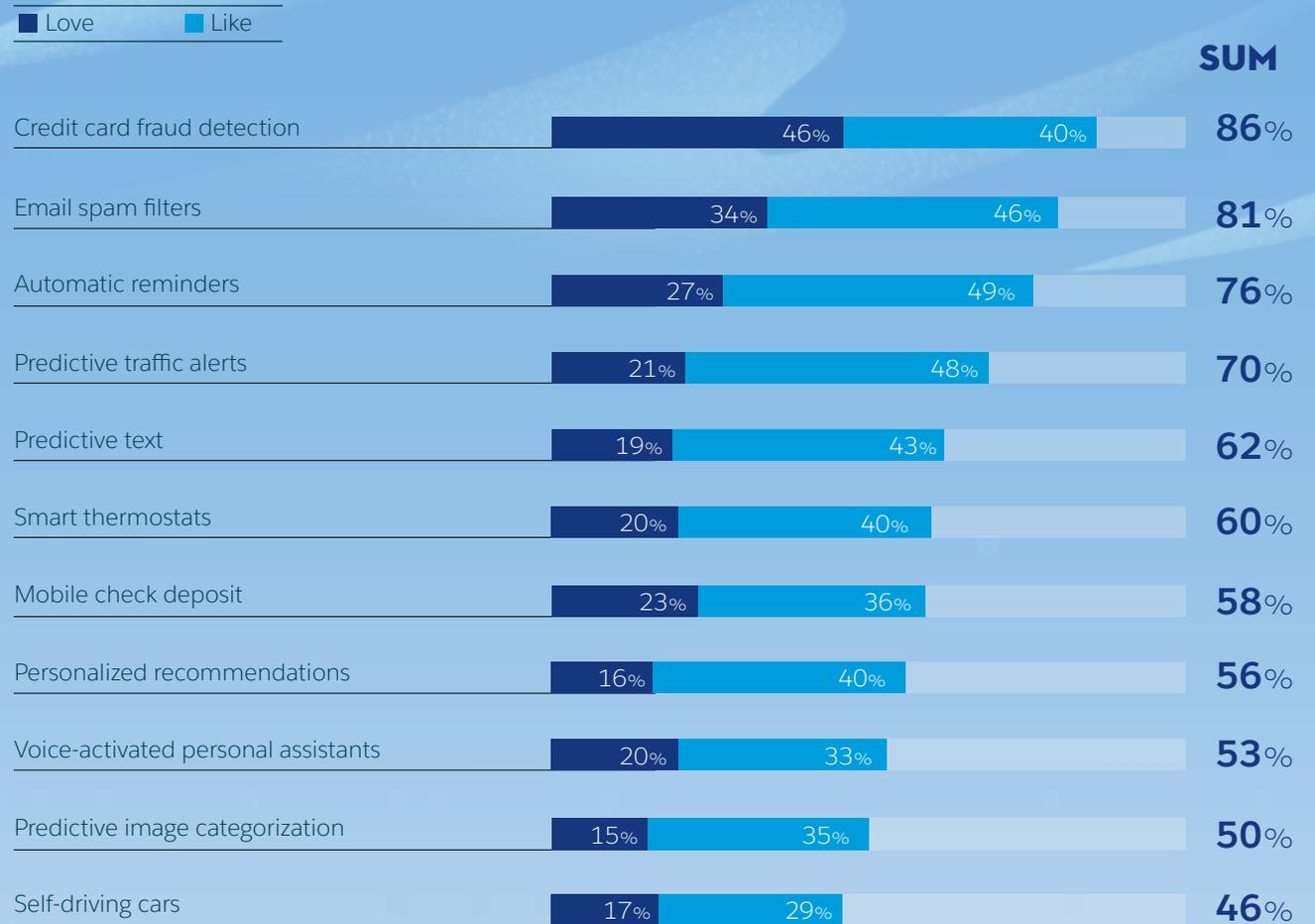
AI is often portrayed as something out of a science fiction novel, yet, customers have come to like – or even love – a variety of everyday technologies that would be impossible without AI. Credit card fraud detection, email spam filters, and automatic reminders are among the most popular AI use cases. More than half of customers have grown fond of voice-activated personal assistants like Siri or Alexa. Other uses, like self-driving cars, are viewed with less enthusiasm.

**59% OF CUSTOMERS ARE OPEN TO COMPANIES USING AI TO IMPROVE THEIR EXPERIENCES.**

**Sixty-seven percent of customers recognize the good that can come from AI, and 61% believe the technology presents positive opportunities for society.** Yet, customer trust is a delicate thing; 31% of customers are wary of companies’ use of new technologies. Thus, educating customers about the technology will be critical as companies explore new ways to differentiate with AI.

### AI-Driven Experiences Are Winning Customers Over

Percentage of Customers Who Love or Like the Following



See appendix page 50 for generational segmentations. Base excludes respondents who said “Don’t Know” for each technology. Percents may not add to the sum total due to rounding.



## 04 Customers Balance Personalization and Privacy Amid a Crisis of Trust

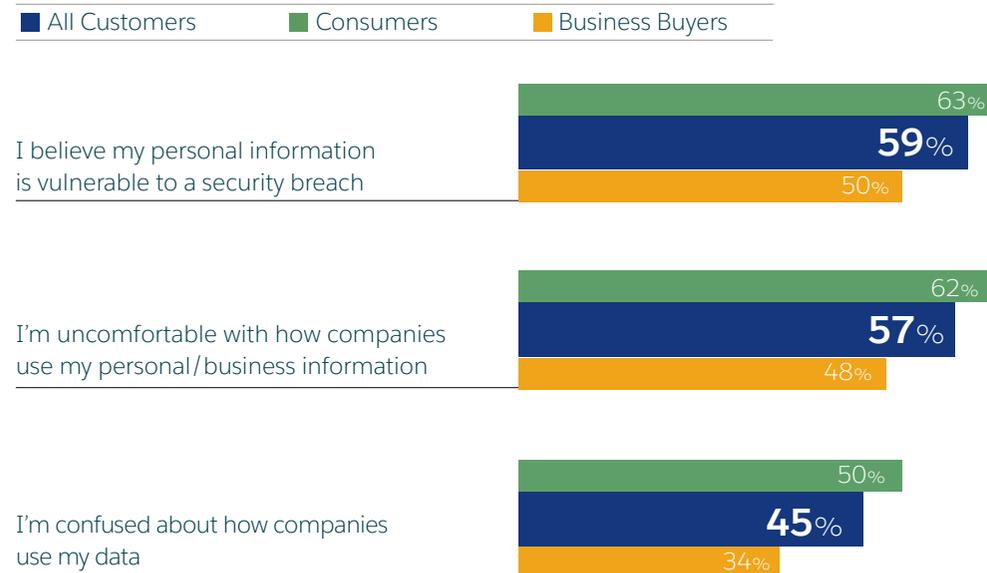
Providing the experiences customers expect takes a new breed of technologies, as well as a thorough understanding of unique needs and expectations – and that takes data. But, as recent incidents have laid bare, not all companies are earning their customers' trust to do the right thing with these technologies and data.

**62% OF CUSTOMERS SAY THEY'RE MORE AFRAID OF THEIR DATA BEING COMPROMISED NOW THAN THEY WERE TWO YEARS AGO.**

The issue, however, goes deeper than a fear of malicious hackers. Fundamentally, customers have lost trust in companies to do the right thing when it comes to their data. Fifty-seven percent of customers (including 62% of consumers) are uncomfortable with how companies use their personal information. Part of this discomfort may stem from the simple fact that so many customers – half of consumers, for instance – feel confused about how companies use their data in the first place.

### In a World of Vulnerabilities, Customers Are Increasingly Distrustful

Percentage of Customers That Agree with the Following



# 04 Customers Balance Personalization and Privacy Amid a Crisis of Trust

On the surface, it may seem that companies face a paradox: How can they provide personalized experiences when customers don't trust them with the data necessary to provide them?

As it turns out, customers are actually fine with companies using their personal information for the stated purpose of meeting their elevated expectations. Overwhelming majorities are willing to share relevant personal information (or in the case of business buyers, professional information) in exchange for perks like personalized offers, personalized shopping experiences, and consistent omni-channel interactions.

**79% OF CUSTOMERS ARE WILLING TO SHARE RELEVANT INFORMATION ABOUT THEMSELVES IN EXCHANGE FOR CONTEXTUALIZED INTERACTIONS IN WHICH THEY'RE IMMEDIATELY KNOWN AND UNDERSTOOD.**

In other words, companies that stay true to using data to provide a better overall experience have a green light to create truly differentiated customer journeys. As other research has shown, this opens up broad opportunities for firms in the media, healthcare, and banking sectors, and everywhere in between.

## Customers Will Swap Data for a Better Experience

Percentage of Customers Who Are Willing to Share Relevant Information About Themselves for the Following



See appendix pages 53-54 for consumer, business buyer, and generational segmentations.

# SPOTLIGHT

## Fostering Trust in the Data-Value Exchange

The challenge for companies seeking to differentiate with data-driven experiences isn't that customers don't want their information applied for such purposes, but that they don't trust that their data will be used for such purposes alone. **Forty-eight percent of customers (including 51% of consumers) believe companies do a bad job at protecting their personal information.**

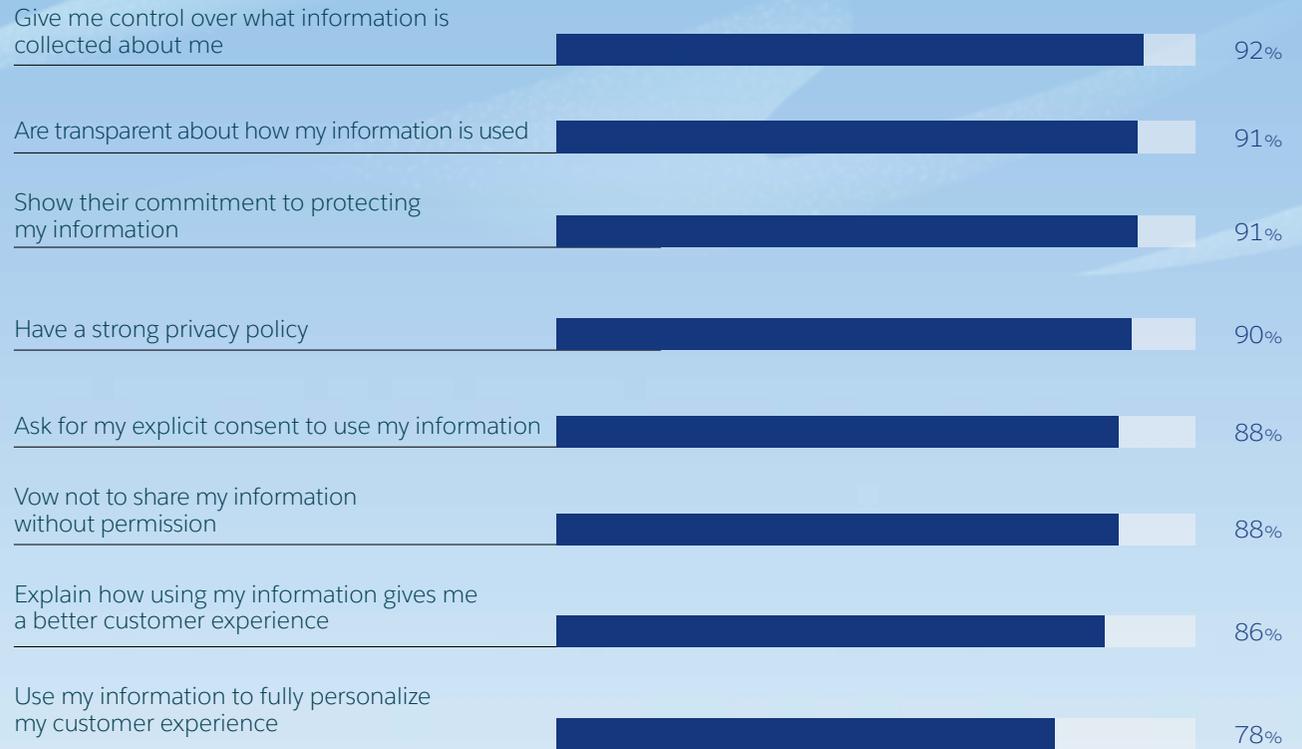
Companies must develop strong privacy policies and demonstrate a commitment to safeguarding data to show that they have customers' best interests at heart. What's more, companies earn trust by being transparent about how customer information is used, and explaining how it provides a better experience.

But while sound policies and transparency are critical, companies earn the most trust by putting customers in the driver's seat of data use. **Ninety-two percent of customers are more likely to trust companies that give them control over what information is collected about them.**

The ROI of sound data practices extends beyond trust. One study of retailers found, compared to competitors with flat or decreasing revenue, companies with at least 10% annual revenue growth are 1.6x more likely to have sound customer security practices.<sup>1</sup>

### Transparency About Customers' Data Use Earns Their Trust

Percentage of Customers Who Say They're More Likely to Trust Companies with Their Personal Information If They Do the Following



See appendix page 55 for consumer and business buyer segmentations.

<sup>1</sup> Salesforce and Deloitte, "Consumer Experience in the Retail Renaissance," March 2018.

# Last Look

## The Values That Drive Loyalty

Winning customers – let alone their loyalty – has never been more challenging than it is today. In a time when great products and services alone won't cut it, companies have to go the extra mile.

We asked the consumers and business buyers in our survey about a dozen corporate values and their impact on their loyalty to a company. Here are the top three factors they told us are most important.

### 01 | EXPERIENCE

Today's connected customers have more access to information – and more choice in who they give their business to – than ever before. At the same time, they're harder to impress. The experience that a company provides is what stands out in customers' minds when it's time to swipe their credit card. **Sixty-four percent of customers say providing an excellent customer experience strengthens their loyalty.**

### 02 | CUSTOMER SUCCESS

Companies focused on quick sales will face strong headwinds in today's customer landscape. Customers take their time when evaluating purchases – whether to compare options online, ask friends on social media for references, or use a different device. Winning customers today requires demonstrating a firm understanding of their unique needs, objectives, and circumstances. It also takes an ongoing investment in the relationship well after the deal is done. **Sixty-one percent of customers say a commitment to their success or satisfaction strengthens their loyalty.**

### 03 | DATA GUARDIANSHIP

Customers are wary of how companies use and protect their data, and with good reason. When privacy policies require a law degree to decipher, and “trusted” brands experience major breaches with alarming frequency, it's natural for privacy and security practices to come under the microscope. Still, customers expect companies to leverage data insights and new technologies to take their experiences to a whole new level. Companies that view these seemingly opposing trends as an opportunity, rather than an impediment to their business, are already on the right track. **Fifty-four percent of customers say a commitment to safeguarding their data strengthens their loyalty.**



# COUNTRY & REGIONAL PROFILES\*

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

Salesforce Research



# Country Profile: United States

600 Consumers & 300 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**65%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**77%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**82%** of business buyers want the same experience as when they're buying for themselves

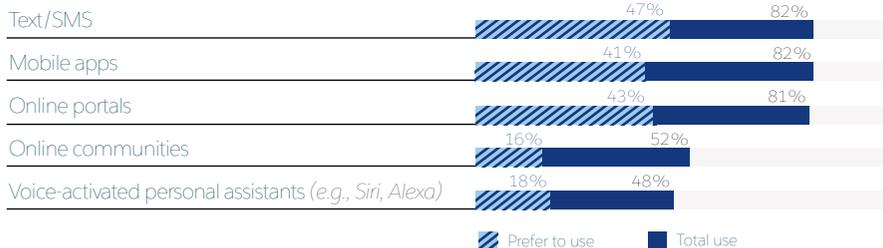
## Customers Dictate the Experiences They Want

**85%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**10** channels are used, on average, by business buyers to communicate with companies

**9** channels are used, on average, by consumers to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



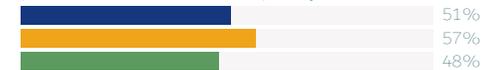
## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**42%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**42%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**46%** of business buyers say AI is already or actively transforming their expectations of companies

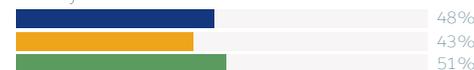
**46%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**39%** of consumers say AI is already or actively transforming their expectations of companies

**39%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust

Giving me control over what information is collected about me

Having a strong privacy policy

Asking for my explicit consent to use my information

Giving me control over what information is collected about me

Having a strong privacy policy

Asking for my explicit consent to use my information

# Country Profile: Australia/New Zealand

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**70%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**80%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**85%** of business buyers want the same experience as when they're buying for themselves

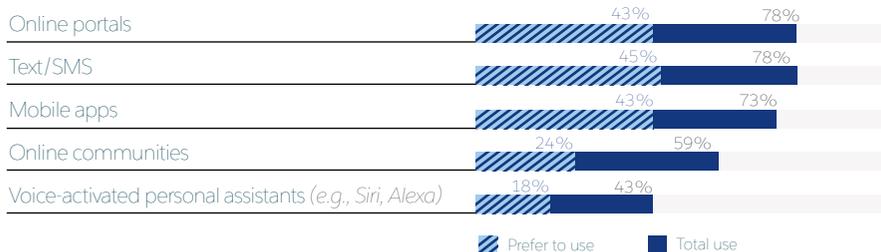
## Customers Dictate the Experiences They Want

**85%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**10** channels are used, on average, by **business buyers** to communicate with companies

**9** channels are used, on average, by **consumers** to communicate with companies

## Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**43%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	57%
Business Buyers	46%
Consumers	48%

**45%** of business buyers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	67%
Business Buyers	53%
Consumers	58%

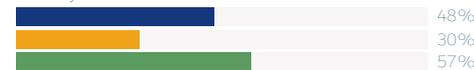
**42%** of consumers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	52%
Business Buyers	43%
Consumers	44%

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



## Top Actions That Increase Customer Trust



# Country Profile: Brazil

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



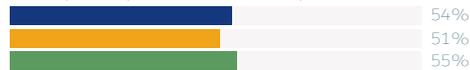
**67%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**89%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**92%** of business buyers want the same experience as when they're buying for themselves

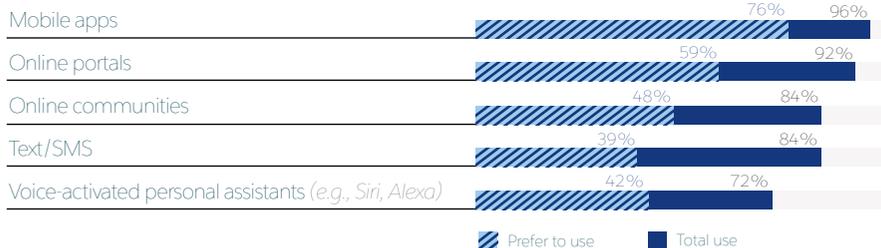
## Customers Dictate the Experiences They Want

**94%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**12** channels are used, on average, by **business buyers** to communicate with companies

**11** channels are used, on average, by **consumers** to communicate with companies

## Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**68%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**68%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**68%** of business buyers say AI is already or actively transforming their expectations of companies

**68%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**68%** of consumers say AI is already or actively transforming their expectations of companies

**68%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



## Top Actions That Increase Customer Trust

Showing a commitment to protecting my information

Giving me control over what information is collected about me

Being transparent about how my information is used

Being transparent about how my information is used

Showing a commitment to protecting my information

Giving me control over what information is collected about me

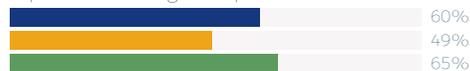
# Country Profile: Canada

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**69%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**80%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**78%** of business buyers want the same experience as when they're buying for themselves

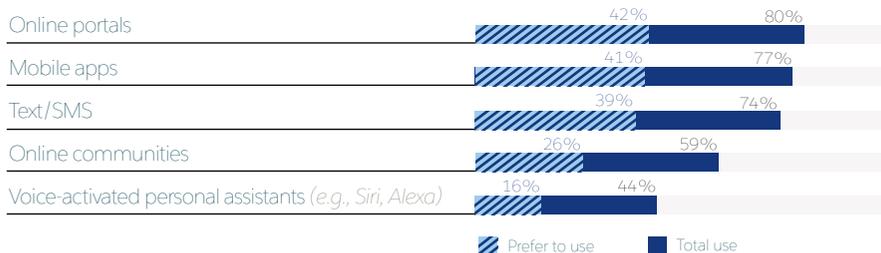
## Customers Dictate the Experiences They Want

**84%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by **business buyers** to communicate with companies

**9** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**44%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**44%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**52%** of business buyers say AI is already or actively transforming their expectations of companies

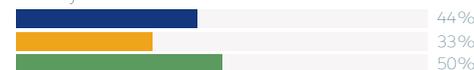
**52%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**40%** of consumers say AI is already or actively transforming their expectations of companies

**40%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



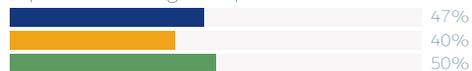
# Country Profile: France

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



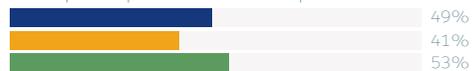
**59%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**82%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**91%** of business buyers want the same experience as when they're buying for themselves

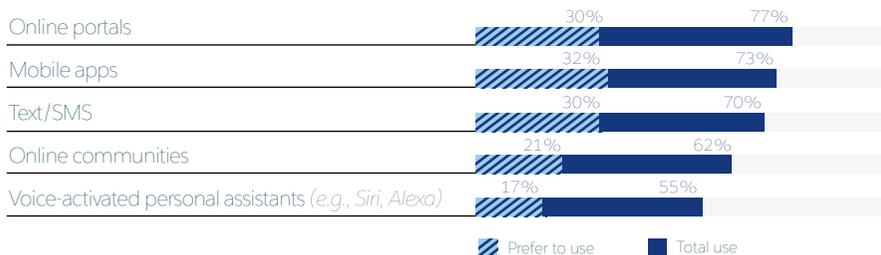
## Customers Dictate the Experiences They Want

**84%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by **business buyers** to communicate with companies

**9** channels are used, on average, by **consumers** to communicate with companies

## Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**48%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

recognize the good that can come from AI	74%
believe AI presents good opportunities for society	66%
open to AI improving the customer experience	65%

**57%** of business buyers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

recognize the good that can come from AI	83%
believe AI presents good opportunities for society	73%
open to AI improving the customer experience	74%

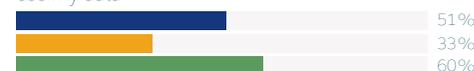
**44%** of consumers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

recognize the good that can come from AI	69%
believe AI presents good opportunities for society	63%
open to AI improving the customer experience	61%

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



## Top Actions That Increase Customer Trust



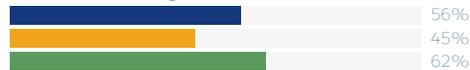
# Country Profile: Germany

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



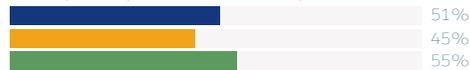
**64%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**74%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**75%** of business buyers want the same experience as when they're buying for themselves

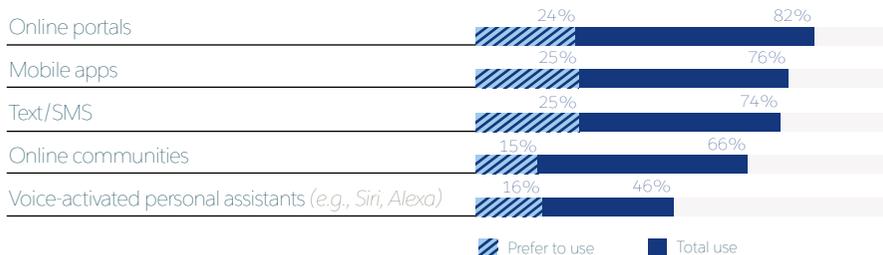
## Customers Dictate the Experiences They Want

**87%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by **business buyers** to communicate with companies

**10** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**47%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	55%
Business Buyers	54%
Consumers	49%

**50%** of business buyers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	61%
Business Buyers	61%
Consumers	55%

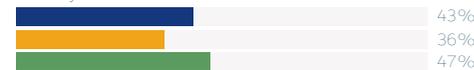
**45%** of consumers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	53%
Business Buyers	51%
Consumers	46%

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust

Giving me control over what information is collected about me

Vowing not to share my information without permission

Showing a commitment to protecting my information

Asking for my explicit consent to use my information

Giving me control over what information is collected about me

Vowing not to share my information without permission

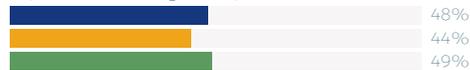
# Country Profile: Hong Kong

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



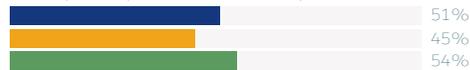
**71%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**86%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**78%** of business buyers want the same experience as when they're buying for themselves

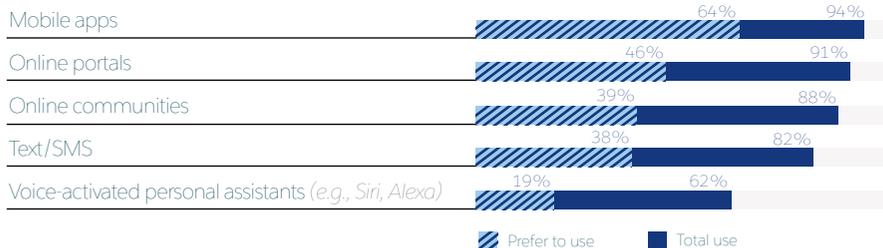
## Customers Dictate the Experiences They Want

**73%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**12** channels are used, on average, by **business buyers** to communicate with companies

**11** channels are used, on average, by **consumers** to communicate with companies

## Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**53%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**59%** of business buyers say AI is already or actively transforming their expectations of companies

73% recognize the good that can come from AI  
61% believe AI presents good opportunities for society  
63% open to AI improving the customer experience

**51%** of consumers say AI is already or actively transforming their expectations of companies

75% recognize the good that can come from AI  
63% believe AI presents good opportunities for society  
67% open to AI improving the customer experience

72% recognize the good that can come from AI  
61% believe AI presents good opportunities for society  
61% open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



## Top Actions That Increase Customer Trust



# Country Profile: India

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**87%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**92%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**88%** of business buyers want the same experience as when they're buying for themselves

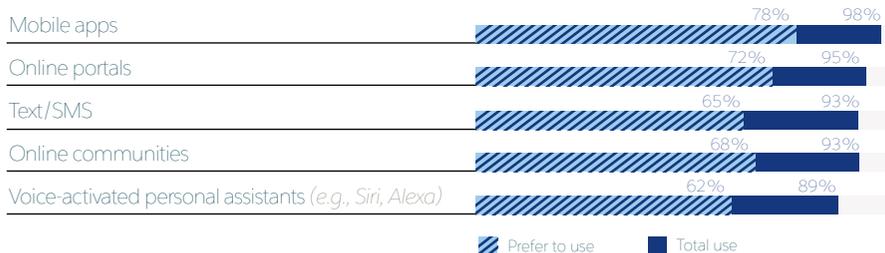
## Customers Dictate the Experiences They Want

**86%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**13** channels are used, on average, by **business buyers** to communicate with companies

**12** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**71%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**71%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**74%** of business buyers say AI is already or actively transforming their expectations of companies

**74%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**69%** of consumers say AI is already or actively transforming their expectations of companies

**69%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



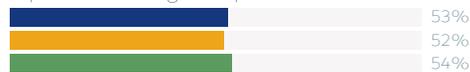
# Country Profile: Japan

## 300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

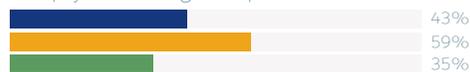
### Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



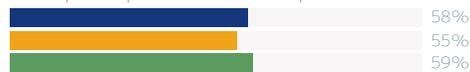
**48%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**63%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**55%** of business buyers want the same experience as when they're buying for themselves

### Customers Dictate the Experiences They Want

**67%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**10** channels are used, on average, by **business buyers** to communicate with companies

**8** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



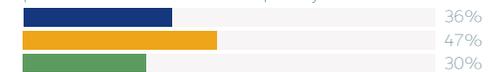
### Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**46%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**46%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**48%** of business buyers say AI is already or actively transforming their expectations of companies

**52%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**45%** of consumers say AI is already or actively transforming their expectations of companies

**42%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

### A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust

- Being transparent about how my information is used
- Asking for my explicit consent to use my information
- Having a strong privacy policy
- Having a strong privacy policy
- Vowing not to share my information without permission
- Being transparent about how my information is used

# Country Profile: Mexico

## 300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

### Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**82%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**94%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**88%** of business buyers want the same experience as when they're buying for themselves

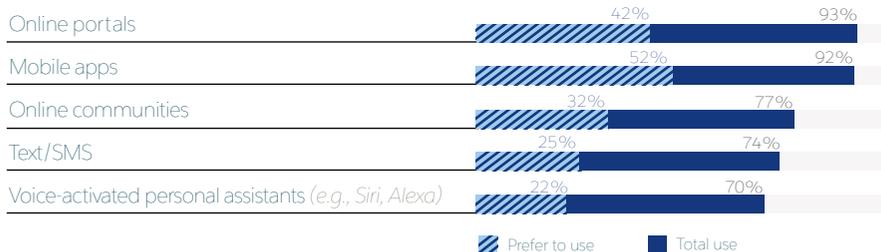
### Customers Dictate the Experiences They Want

**93%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**12** channels are used, on average, by **business buyers** to communicate with companies

**11** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



### Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



I expect companies to provide new products/services more frequently than before



**69%** of all customers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**88%** of consumers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

### A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



# Country Profile: Netherlands

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

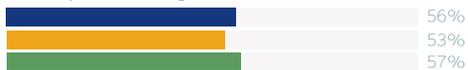
## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**55%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**69%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**78%** of business buyers want the same experience as when they're buying for themselves

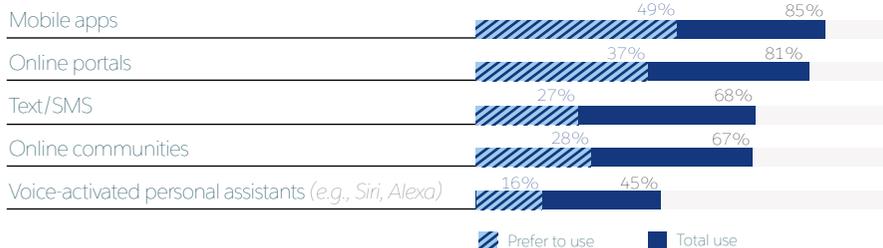
## Customers Dictate the Experiences They Want

**82%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by **business buyers** to communicate with companies

**10** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



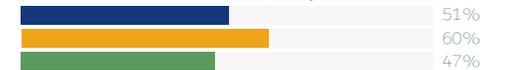
## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**40%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**40%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**37%** of business buyers say AI is already or actively transforming their expectations of companies

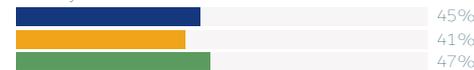
**37%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**41%** of consumers say AI is already or actively transforming their expectations of companies

**41%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



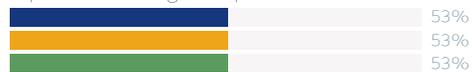
# Country Profile: Nordics

300 Consumers & 123 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**52%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**65%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**83%** of business buyers want the same experience as when they're buying for themselves

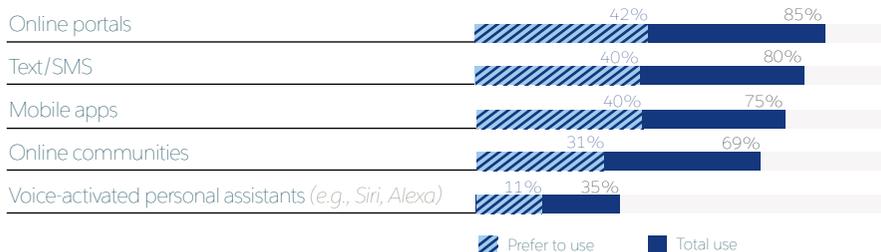
## Customers Dictate the Experiences They Want

**81%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by **business buyers** to communicate with companies

**10** channels are used, on average, by **consumers** to communicate with companies

## Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



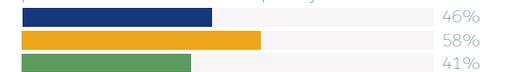
## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**42%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	61%
Business Buyers	50%
Consumers	50%

**49%** of business buyers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	72%
Business Buyers	62%
Consumers	59%

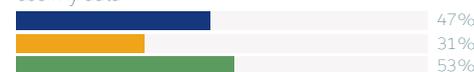
**39%** of consumers say AI is already or actively transforming their expectations of companies

recognize the good that can come from AI  
believe AI presents good opportunities for society  
open to AI improving the customer experience

All Customers	56%
Business Buyers	45%
Consumers	47%

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



## Top Actions That Increase Customer Trust

- Giving me control over what information is collected about me
- Having a strong privacy policy
- Being transparent about how my information is used

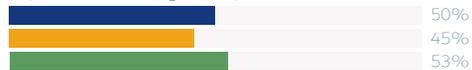
# Country Profile: Singapore

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



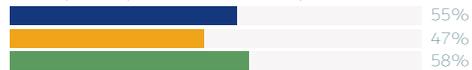
**70%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**88%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**89%** of business buyers want the same experience as when they're buying for themselves

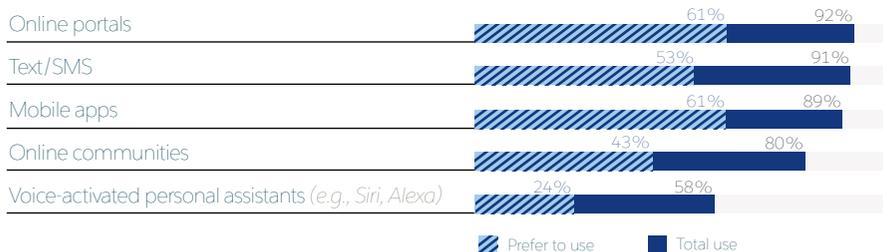
## Customers Dictate the Experiences They Want

**84%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**12** channels are used, on average, by **business buyers** to communicate with companies

**11** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**57%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**57%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**61%** of business buyers say AI is already or actively transforming their expectations of companies

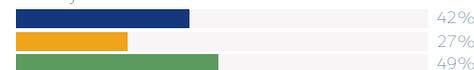
**61%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**55%** of consumers say AI is already or actively transforming their expectations of companies

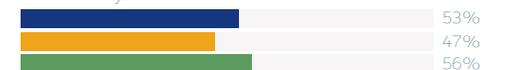
**55%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



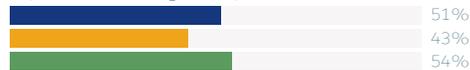
# Country Profile: United Kingdom

300 Consumers & 150 Business Buyers

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



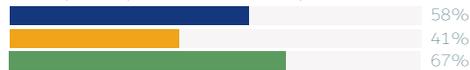
**74%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**80%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**84%** of business buyers want the same experience as when they're buying for themselves

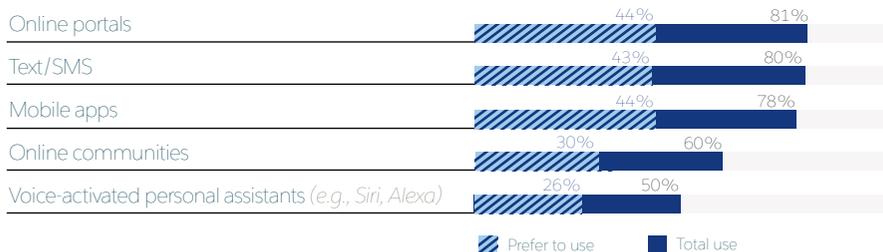
## Customers Dictate the Experiences They Want

**86%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**12** channels are used, on average, by **business buyers** to communicate with companies

**10** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**47%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**47%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**60%** of business buyers say AI is already or actively transforming their expectations of companies

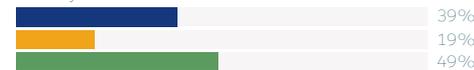
**60%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**41%** of consumers say AI is already or actively transforming their expectations of companies

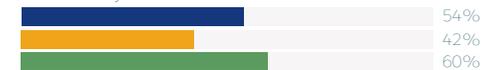
**41%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



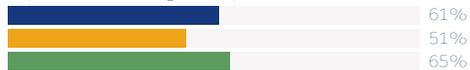
# Regional Profile: North America

900 Consumers & 450 Business Buyers in Canada and the U.S.

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**67%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**78%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**81%** of business buyers want the same experience as when they're buying for themselves

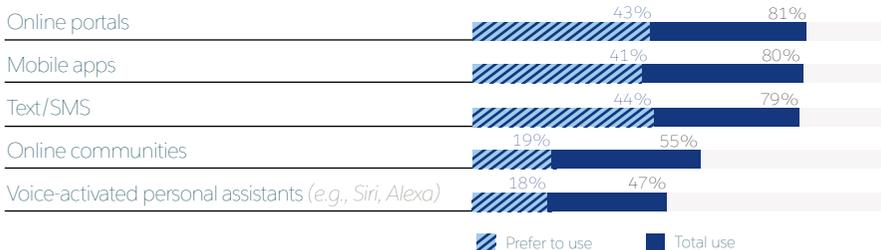
## Customers Dictate the Experiences They Want

**85%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**10** channels are used, on average, by **business buyers** to communicate with companies

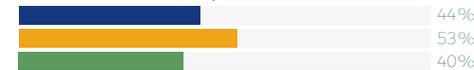
**9** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



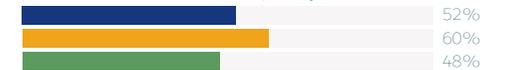
## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**42%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**42%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**48%** of business buyers say AI is already or actively transforming their expectations of companies

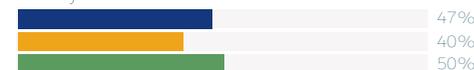
**48%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**40%** of consumers say AI is already or actively transforming their expectations of companies

**40%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



# Regional Profile: Latin America

600 Consumers & 300 Business Buyers in Mexico and Brazil

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



**75%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**92%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**90%** of business buyers want the same experience as when they're buying for themselves

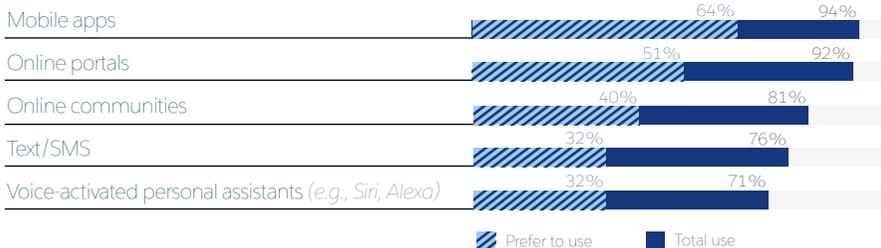
## Customers Dictate the Experiences They Want

**93%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**12** channels are used, on average, by **business buyers** to communicate with companies

**11** channels are used, on average, by **consumers** to communicate with companies

## Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**69%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**69%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**67%** of business buyers say AI is already or actively transforming their expectations of companies

**67%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**70%** of consumers say AI is already or actively transforming their expectations of companies

**70%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



## Top Actions That Increase Customer Trust

Showing a commitment to protecting my information

Being transparent about how my information is used

Giving me control over what information is collected about me

Showing a commitment to protecting my information

Giving me control over what information is collected about me

Being transparent about how my information is used

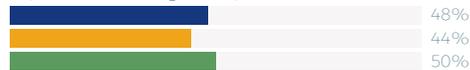
# Regional Profile: JAPAC

1,500 Consumers & 750 Business Buyers in Japan, Australia/New Zealand, Hong Kong, India, and Singapore

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



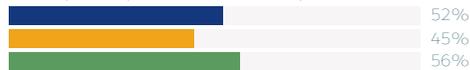
**69%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**82%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**79%** of business buyers want the same experience as when they're buying for themselves

## Customers Dictate the Experiences They Want

**79%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by business buyers to communicate with companies

**10** channels are used, on average, by consumers to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**54%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



69% of all customers recognize the good that can come from AI, 67% believe AI presents good opportunities for society, and 63% are open to AI improving the customer experience

**57%** of business buyers say AI is already or actively transforming their expectations of companies

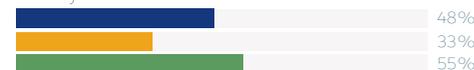
75% of business buyers recognize the good that can come from AI, 71% believe AI presents good opportunities for society, and 69% are open to AI improving the customer experience

**52%** of consumers say AI is already or actively transforming their expectations of companies

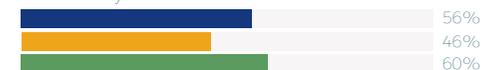
65% of consumers recognize the good that can come from AI, 65% believe AI presents good opportunities for society, and 60% are open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust

Having a strong privacy policy

Giving me control over what information is collected about me

Asking for my explicit consent to use my information

Having a strong privacy policy

Giving me control over what information is collected about me

Vowing not to share my information without permission

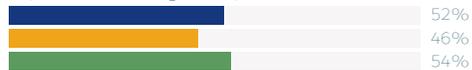
# Regional Profile: EMEA

1,500 Consumers & 723 Business Buyers in France, Germany, the Netherlands, the Nordics, the United Kingdom

■ All Customers ■ Business Buyers ■ Consumers

## Customer Standards Hit All-Time Highs

Most companies fall short of my expectations for a great experience



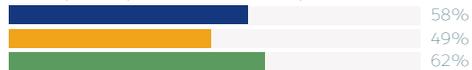
**61%** of all customers say their standard for good customer experiences is higher than ever

I will pay more for a great experience



**74%** of all customers say the experience a company provides is as important as its products/services

I've stopped buying from a company because a competitor provided a better experience



**82%** of business buyers want the same experience as when they're buying for themselves

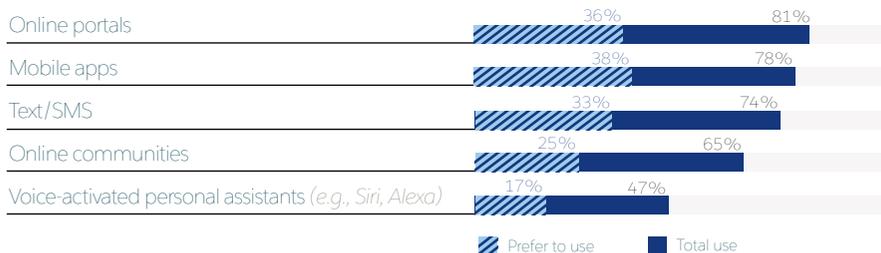
## Customers Dictate the Experiences They Want

**84%** of all customers say it's very important for companies to treat them as a person, not a number, to win their business

**11** channels are used, on average, by **business buyers** to communicate with companies

**10** channels are used, on average, by **consumers** to communicate with companies

### Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies



## Customers Set New Benchmarks for Innovation

Companies need cutting-edge digital experiences to keep my business



**45%** of all customers say AI is already or actively transforming their expectations of companies

I expect companies to provide new products/services more frequently than before



**45%** of all customers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**51%** of business buyers say AI is already or actively transforming their expectations of companies

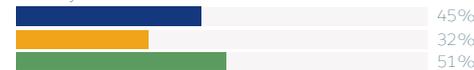
**51%** of business buyers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

**42%** of consumers say AI is already or actively transforming their expectations of companies

**42%** of consumers recognize the good that can come from AI believe AI presents good opportunities for society open to AI improving the customer experience

## A Data-Value Exchange Rises as Customer Trust Falls

I'm confused about how companies use my data



I believe my personal info is vulnerable to a security breach



### Top Actions That Increase Customer Trust



# APPENDIX

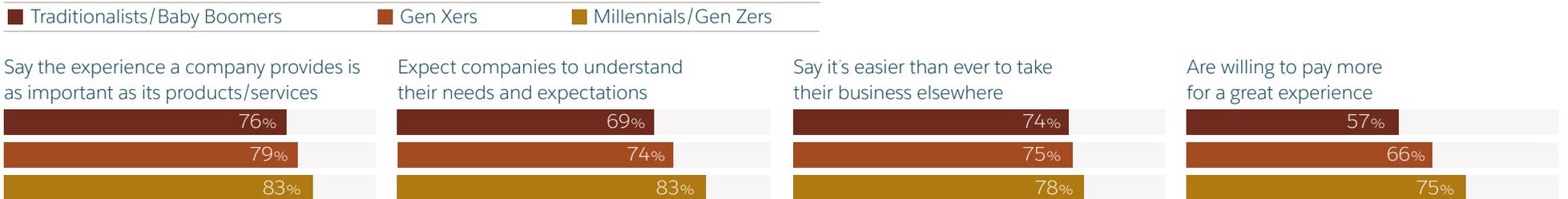


## Customer Expectations Hit All-Time Highs

Percentage of Customers Who Agree with the Following, by Customer Type



Percentage of Customers Who Agree with the Following, by Generation



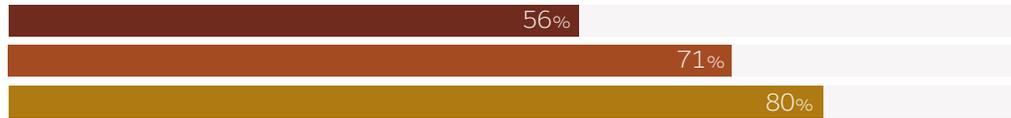
# Appendix

## Customer Expectations Hit All-Time Highs

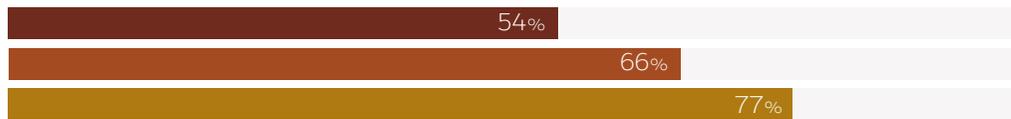
### Percentage of Business Buyers Who Agree With the Following, by Generation

■ Traditionalists/Baby Boomers ■ Gen Xers ■ Millennials/Gen Zers

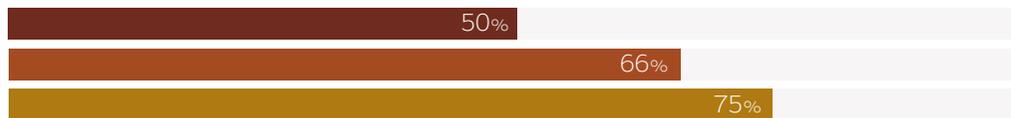
I expect vendors to personalize engagement to my needs



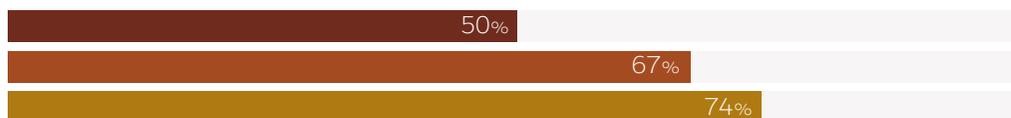
I expect Amazon-like business buying experiences



I think vendors are providing more retail-like experiences than ever before



I have switched vendors for a more consumer-like experience



## Companies Face a New Connected Mandate

Percentage of Customers Who Say the Following, by Customer Type

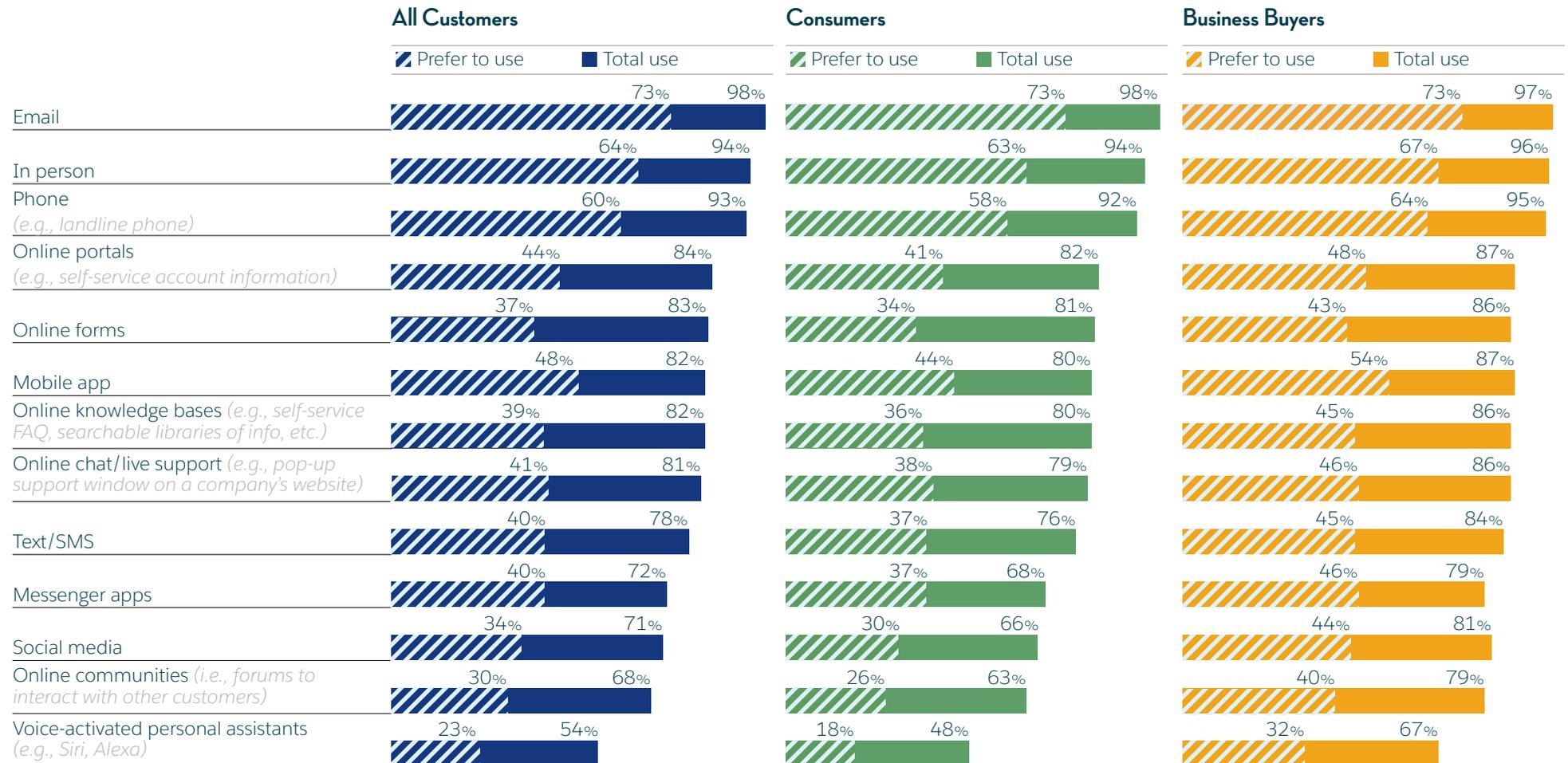
■ Consumers      ■ Business Buyers



	Traditionalists/Baby Boomers				Gen Xers				Millennials/Gen Zers			
	Important	Unimportant	Net Difference	Important vs. Unimportant	Important	Unimportant	Net Difference	Important vs. Unimportant	Important	Unimportant	Net Difference	Important vs. Unimportant
<b>BEFORE THEY BUY</b>												
Easy-to-access product information	53%	2%	51%	26.5x more likely	51%	3%	48%	18.1 more likely	50%	5%	45%	10.5x more likely
User-generated content (e.g., product reviews, photos, testimonials, and other content from other customers)	27%	18%	8%	1.5x more likely	36%	15%	21%	2.4 more likely	44%	11%	33%	4.1 more likely
Personalized offers (i.e., a discount based on my purchase history)	24%	23%	1%	-	33%	15%	18%	2.2 more likely	39%	12%	28%	3.4 more likely
Personalized communications (e.g., email newsletters, etc.)	22%	26%	-4%	1.2x less likely	28%	20%	8%	1.4 more likely	37%	15%	22%	2.5 more likely
Retargeted offers (i.e., ads on one channel based on my actions on another channel, like an online ad for a previously viewed product)	14%	32%	-18%	2.3x less likely	25%	23%	3%	1.1 more likely	33%	17%	16%	2.0 more likely
Personalized ads across all channels (e.g., online ads, mobile, social media, etc.)	13%	38%	-24%	2.9x less likely	20%	29%	-9%	1.4 less likely	31%	19%	11%	1.6 more likely
<b>WHEN THEY BUY</b>												
Knowledgeable salespeople	51%	3%	48%	19.4x more likely	50%	3%	47%	19.5 more likely	51%	5%	46%	10.7 more likely
Quick and easy checkout	50%	2%	48%	24.5x more likely	51%	3%	48%	16.9 more likely	50%	5%	46%	10.4 more likely
Product comparison tools	37%	8%	29%	4.7x more likely	43%	7%	36%	6.4 more likely	45%	7%	39%	7.0 more likely
Seamless transitions between channels (e.g., online to in-store)	30%	13%	17%	2.3x more likely	36%	10%	27%	3.8 more likely	43%	9%	34%	5.0 more likely
Mobile apps	22%	29%	-7%	1.3x less likely	33%	17%	17%	2.0 more likely	41%	11%	30%	3.8 more likely
Product recommendations (that match my buying habits)	20%	26%	-6%	1.3x less likely	28%	20%	8%	1.4 more likely	38%	14%	25%	2.8 more likely
<b>AFTER THEY BUY</b>												
Service agents that are empowered to resolve my issue (i.e., with information, tools, and decision-making authority)	51%	3%	48%	15.5 more likely	48%	4%	44%	11.1 more likely	50%	5%	45%	9.7 more likely
Real-time messaging when I need service	38%	11%	28%	3.6 more likely	42%	9%	33%	4.6 more likely	44%	8%	36%	5.6 more likely
Availability of my preferred service channels	34%	9%	25%	3.8 more likely	39%	7%	33%	5.7 more likely	43%	7%	36%	6.0 more likely
Self-service tools (e.g., account portals, FAQ)	35%	9%	26%	3.9 more likely	39%	8%	31%	4.8 more likely	42%	7%	35%	5.8 more likely
Customer service that comes to me (i.e., mobile service agents with the same information and capabilities as those in a call center)	29%	17%	11%	1.7 more likely	35%	14%	21%	2.6 more likely	40%	11%	29%	3.5 more likely
Proactive service (e.g., based on IoT)	26%	18%	9%	1.5 more likely	32%	16%	17%	2.1 more likely	39%	12%	28%	3.4 more likely
Online communities (e.g., customer forums)	18%	37%	-18%	2.0 less likely	28%	26%	3%	1.1 more likely	38%	16%	22%	2.4 more likely
Automated service assistants (e.g., chatbots)	12%	33%	-21%	2.7 less likely	21%	26%	-6%	1.3 more likely	31%	17%	14%	1.8 more likely

Net difference is based on the percentage of respondents viewing a quality as important and those viewing it as unimportant using the following formula: (important - unimportant). Respondents were not required to rate a quality as important or unimportant. Data is based off respondents who elected to rate a quality as such.

Percentage of Customers Who Use and Prefer the Following Channels When Communicating with Companies, by Customer Type

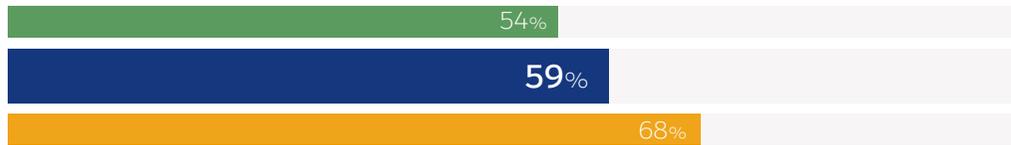


## Technology Sets New Benchmarks for Innovation

Percentage of Customers Who Agree with the Following, by Customer Type

■ All Customers   ■ Consumers   ■ Business Buyers

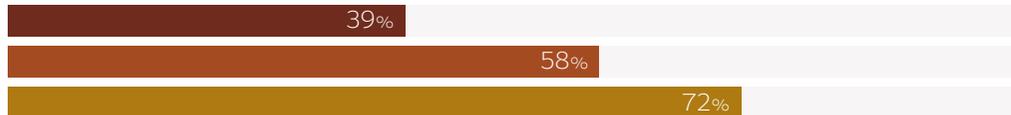
Companies need cutting-edge digital experiences to keep my business



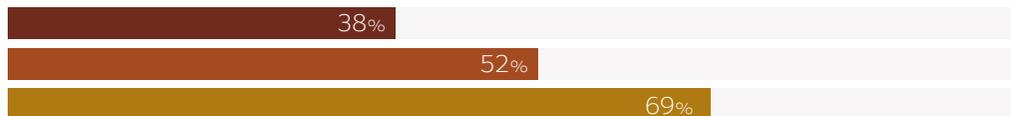
Percentage of Customers Who Agree with the Following, by Generation

■ Traditionalists/Baby Boomers   ■ Gen Xers   ■ Millennials/Gen Zers

Companies need cutting-edge digital experiences to keep my business



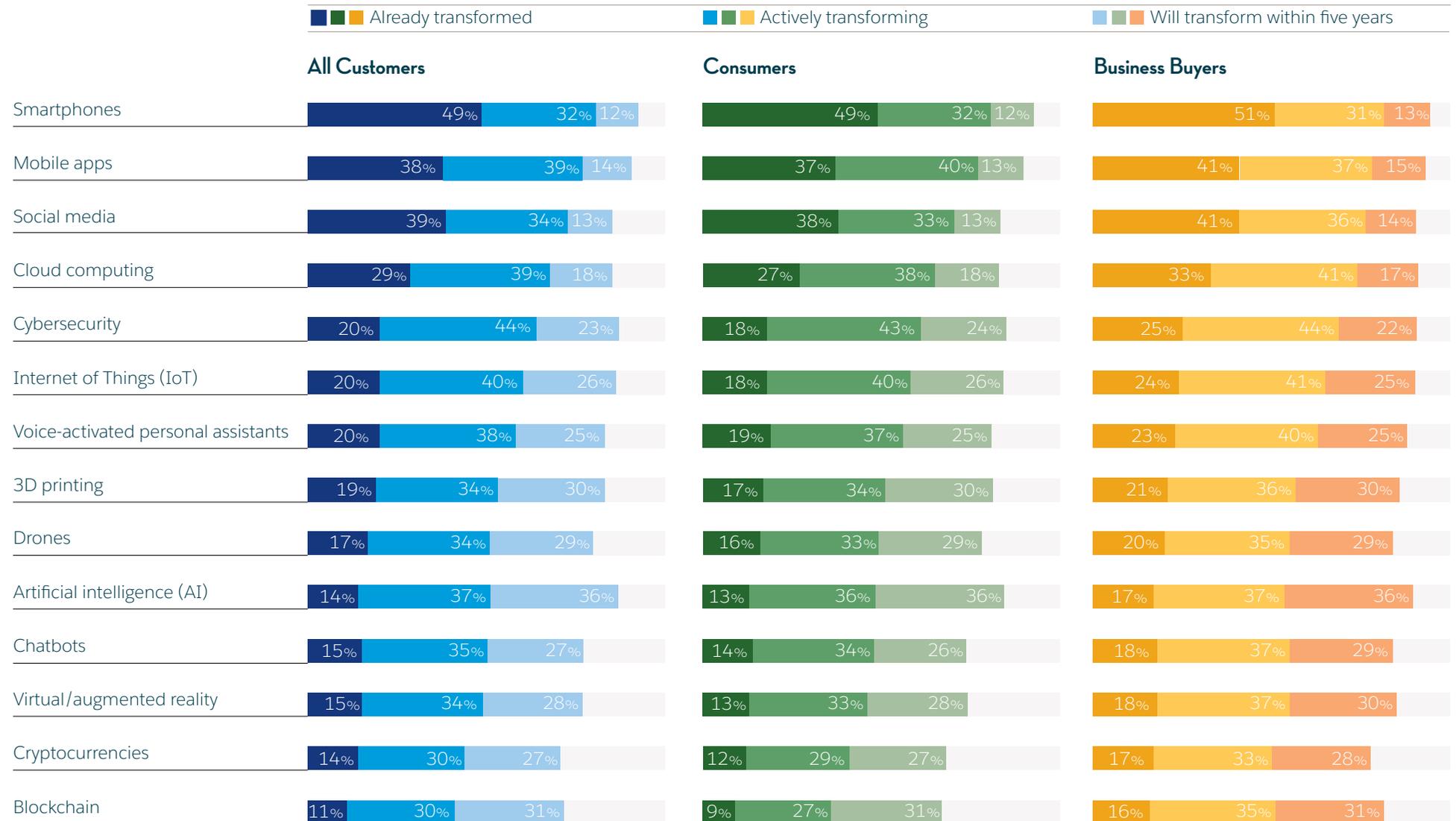
I actively seek to buy from the most innovative companies (e.g., those that consistently introduce new products/services based on customer needs and new technology)



# Appendix

## Technology Sets New Benchmarks for Innovation

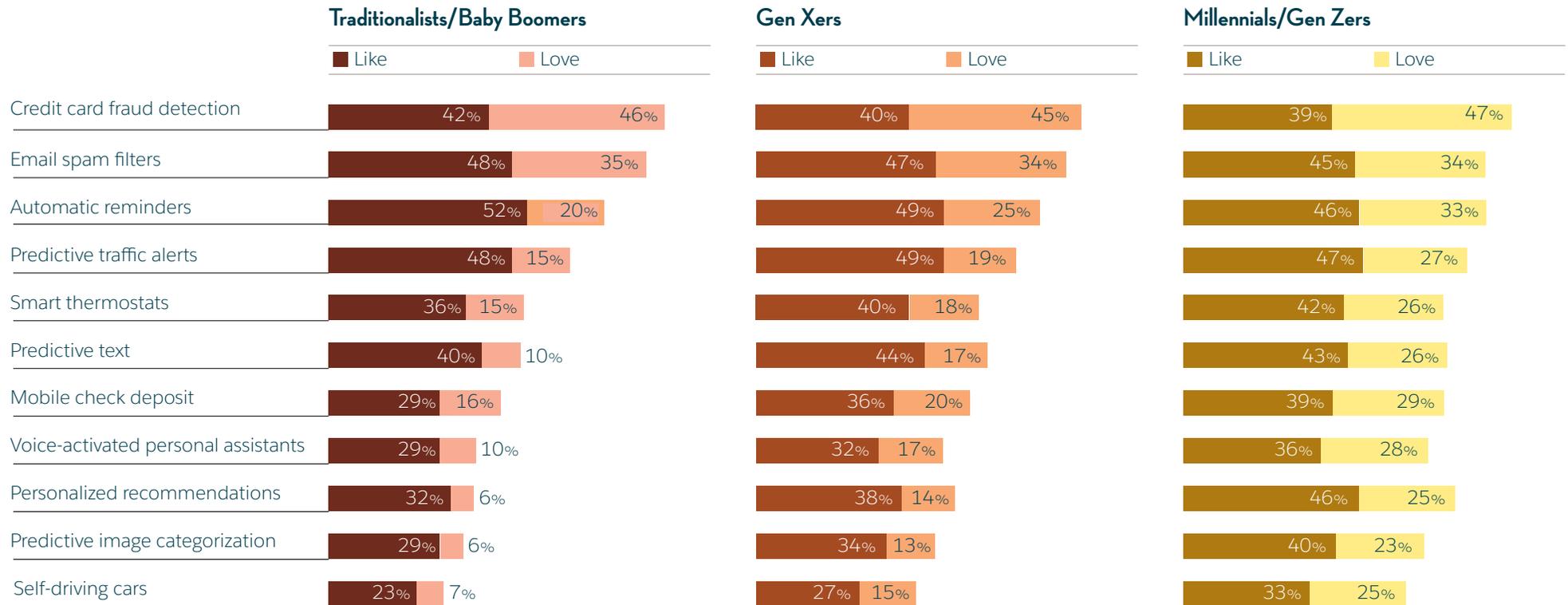
Percentage of Customers Who Believe the Following Technologies Will Transform Their Expectations of Companies, by Customer Type



# Appendix

## Technology Sets New Benchmarks for Innovation

Percentage of Customers Who Love or Like the Following, by Generation



Base excludes respondents who said "Don't know" for each technology.

## Technology Sets New Benchmarks for Innovation

Percentage of Customers Who Say the Following Technologies Are Revolutionary or Insignificant, by Customer Type

	Consumers				Business Buyers			
	Revolutionary	Insignificant	Net Difference	Revolutionary vs. Insignificant	Revolutionary	Insignificant	Net Difference	Revolutionary vs. Insignificant
Artificial intelligence (AI)	32%	3%	29%	9.7x more likely	34%	4%	31%	9.1x more likely
Internet of Things (IoT)	28%	4%	24%	7.3x more likely	31%	4%	27%	7.4x more likely
Blockchain	19%	5%	14%	4.1x more likely	24%	5%	19%	4.8x more likely
Cryptocurrencies	18%	8%	11%	2.4x more likely	20%	8%	12%	2.6x more likely
Virtual/augmented reality	22%	9%	13%	2.4x more likely	26%	7%	19%	3.7x more likely
Chatbots	14%	14%	0%	–	20%	11%	9%	1.8x more likely
Cybersecurity	23%	2%	21%	10.2x more likely	28%	3%	25%	10.1x more likely
Mobile apps	29%	4%	25%	6.9x more likely	31%	4%	27%	8.4x more likely
Smartphones	44%	2%	41%	18.3x more likely	40%	3%	38%	14.9x more likely
Social media	20%	8%	12%	2.6x more likely	24%	6%	18%	3.9x more likely
Voice-activated personal assistants	21%	9%	12%	2.4x more likely	24%	7%	17%	3.3x more likely
Cloud computing	29%	3%	26%	9.9x more likely	31%	3%	29%	11.8x more likely
Drones	26%	6%	20%	4.2x more likely	26%	5%	21%	4.8x more likely
3D printing	38%	4%	34%	9.9x more likely	36%	4%	31%	8.1x more likely

Net difference is based on the percentage of respondents viewing a technology as revolutionary and those viewing it as insignificant using the following formula: (revolutionary - insignificant). Respondents were not required to rate a technology as revolutionary or insignificant. Data is based off respondents who elected to rate a technology as such.

## Customers Balance Personalization and Privacy Amid a Crisis of Trust

Percentage of Customers Who Say the Following, by Customer Type

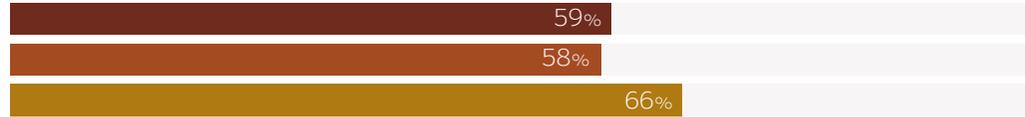
Consumers Business Buyers



Percentage of Customers Who Say the Following, by Generation

Traditionalists/Baby Boomers Gen Xers Millennials/Gen Zers

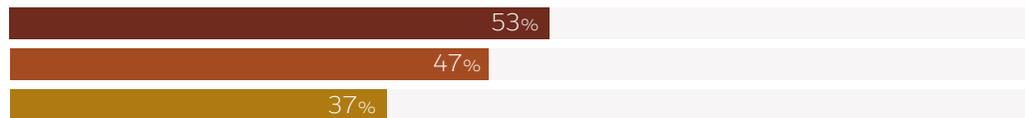
Fear of my data being compromised has increased over the past two years



I'm uncomfortable with how companies use my personal/business information



I'm confused about how companies use my data



## Customers Balance Personalization and Privacy Amid a Crisis of Trust

Percentage of Customers Who Are Willing to Share Relevant Information About Themselves for the Following, by Customer Type

### ACROSS THE JOURNEY

Connections between digital and in-person experiences



Consistent interactions across every channel



Contextualized interactions



Connected devices and services



### BEFORE THEY BUY

Personalized offers or discounts



Personalized online shopping experiences



Personalized in-store shopping experiences



Personalized product recommendations



### WHEN & AFTER THEY BUY

Simpler purchasing process



More consultative help from salespeople



Proactive customer service



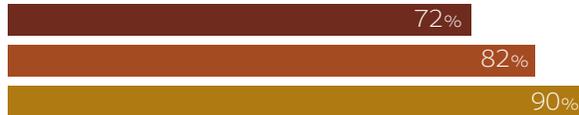
■ Consumers  
■ Business Buyers

## Customers Balance Personalization and Privacy Amid a Crisis of Trust

Percentage of Customers Who Are Willing to Share Relevant Information About Themselves for the Following, by Generation

### ACROSS THE JOURNEY

Connections between digital and in-person experiences



Consistent interactions across every channel



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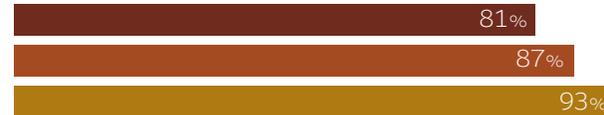


Connected devices and services



### BEFORE THEY BUY

Personalized offers or discounts



Personalized online shopping experiences



Personalized in-store shopping experiences

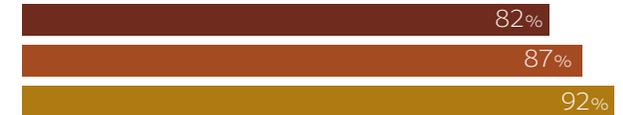


Personalized product recommendations



### WHEN & AFTER THEY BUY

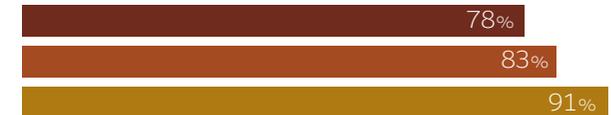
Simpler purchasing process



More consultative help from salespeople



Proactive customer service



## Customers Balance Personalization and Privacy Amid a Crisis of Trust

## Percentage of Customers Who Say They're More Likely to Trust Companies with Their Personal Information If They Do the Following, by Customer Type

Give me control over what information is collected about me



Are transparent about how my information is used



Have a strong privacy policy



Show their commitment to protecting my information



Vow not to share my information without permission



Ask for my explicit consent to use my information



Explain how using my information gives me a better customer experience



Use my information to fully personalize my customer experience



# DEMOGRAPHICS



## Customer Breaks

Business Buyers .....	33%
Consumers .....	67%

## Company Size

Small (1–100 employees) .....	34%
Medium (101–3,500 employees) .....	46%
Enterprise (3,501+ employees) .....	20%

## Generation

Traditionalists/Baby Boomers (born before 1965) .....	24%
Gen Xers (born 1965–1980) .....	37%
Millennials/Gen Zers (born 1981–1999) .....	39%

## Gender

Male .....	59%
Female .....	41%

## Level of Education

Less than a high school diploma .....	2%
High school degree or equivalent (e.g., GED) .....	11%
Some college, no degree .....	8%
Associate degree (e.g., AA, AS) .....	7%
Bachelor's degree (e.g., BA, BS) .....	36%
Master's degree (e.g., MA, MS, MEd) .....	23%
Professional degree (e.g., MD, DDS, DVM) .....	9%
Doctorate (e.g., PhD, EdD) .....	4%

## Country

United States .....	13%
Australia/New Zealand .....	7%
Brazil .....	7%
Canada .....	7%
France .....	7%
Germany .....	7%
Hong Kong .....	7%
India .....	7%
Japan .....	7%
Mexico .....	7%
Netherlands .....	7%
Singapore .....	7%
United Kingdom .....	7%
Nordics (Norway, Finland, Sweden, Iceland, Denmark) .....	6%

## Region

NAM .....	20%
LAM .....	13%
JAPAC .....	33%
EMEA .....	33%





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