2020 Report- Sitel Group

COVID-19 Customer Experience Index Pulse Survey

Understanding Brand Loyalty & Consumer Engagement

Brand Loyalty
Understanding how the customer experience impacts loyalty to companies and brands

Customer Engagement
How consumers perceive and respond to various customer experiences

In this Report

Survey Methodology

WHAT?

20-question digital survey

WHEN?

May 2020

WHO?

1,000 U.S. and 1,000 U.K. adults (age 18+)

HOW?

Direct to mobile users via Pollfish

Discovering

This survey was conducted to understand how the customer experience (CX) impacts brand engagement and loyalty among U.S. and U.K. consumers during the COVID-19 pandemic, compared to before the pandemic, and explores themes such as technology, e-commerce, direct-to-consumer brands, digital representatives and more.

1 / Key findings

Customer experience impacts

on brand engagement during COVID-19

Question 1

> Have you been shopping online for products/services you would normally buy in person during the current COVID-19 pandemic (e.g., groceries, personal care, etc.)?

Answers	Percent
Yes	76.10%
No	22.85%
I don't know	1.05%

More than three-quarters (76%) of consumers have been shopping online for products and services they would normally buy in person during the COVID-19 pandemic. Nearly a quarter (23%) have not.

U.K. consumers are more likely to have shopped online during the pandemic for products/services they would normally buy in person

Nearly four in five (79%) U.K. consumers have been shopping online for products and services they would normally buy in person during the COVID-19 pandemic, compared to 73% of U.S. consumers.

Women are more likely than men to shop online during the pandemic

More women (78%) have shopped online for products and services they would normally buy in person during the COVID-19 pandemic, compared to men (74%).

U.K. women are the most likely to shop online during the pandemic

U.K. women (85%) are the most likely to have shopped online for products and services they would normally buy in person during the COVID-19 pandemic, compared to U.S. women (74%), U.S. men (69%) and U.K. men (76%).

Millennials are the most likely to shop online during the pandemic

millennials (88%) are the most likely to have shopped online for products and services they would normally buy in person during the COVID-19 pandemic, compared to Gen Zs (80%), Gen X (71%) and baby boomers (66%).

U.K. millennials are the most likely to shop online during the pandemic

U.K. millennials (90%) are the most likely to have shopped online for products and services they would normally buy in person during the COVID-19 pandemic, compared to U.S. millennials (84%), U.K. Gen Zs (78%), U.S. Gen Zs (81%), U.K. Gen X (72%), U.S. Gen X (69%), U.K. baby boomers (69%), and U.S. baby boomers (64%).

Question 2

> Do you plan to continue to shop for those items online instead of in-person after the pandemic ends?

Answers	Percent
Yes	56.77%
No	17.21%
I don't know	26.02%

More than half (57%) of consumers plan to continue shopping for items online instead of in-person after the pandemic, while 17% do not, and more than a quarter (26%) don't know.

U.K. consumers are more likely to continue shopping online post-pandemic

More U.K. consumers (59%) than U.S. consumers (54%) plan to continue shopping for items online instead of in-person after the pandemic. U.S. consumers (18%) are slightly more likely not to continue shopping for these items online, compared to U.K. consumers (16%), and U.S. consumers (28%) are more likely than U.K. consumers (25%) to be undecided.

Men are more likely to continue shopping online post-pandemic

Nearly three in five (59%) men plan to continue shopping for items online instead of in-person after the pandemic, compared to 55% of women.

U.S men are the most likely to continue shopping online post-pandemic

U.S. men (61%) are the most likely to continue shopping for items online instead of in-person after the pandemic, compared to U.S. women (55%), U.K. women (60%) and U.K. men (59%).

Gen Xs are the most likely to continue shopping online post-pandemic

Gen Xs (59%) are the most likely to continue shopping for items online instead of in-person after the pandemic, compared to Gen Zs (52%), millennials (58%) and baby boomers (50%).

U.S. Gen Xs are the most likely to continue shopping online post-pandemic

U.S. Gen Xs (62%) are the most likely to continue shopping for items online instead of in-person after the pandemic, compared to U.K. Gen Zs (60%), U.S. Gen Zs (45%), U.K. millennials (59%), U.S. millennials (57%), U.K. Gen Xs (57%), U.K. baby boomers (55%) and U.S. baby boomers (45%).

Question 3

> Why do you plan to continue to shop more online after the pandemic ends?

Answers	Percent
Convenience	44.68%
Availability of products/larger choice of inventory	14.24%
Pricing is cheaper	10.19%
It is much quicker to shop online than in-store	21.64%
I prefer online (i.e. digital representative) customer service to in-person	7.64%
I don't know	1.62%

Nearly half (45%) of consumers plan to continue to shop more online after the pandemic ends because it's convenient. Other top reasons include: it's quicker to shop online (22%); availability of products/larger choice of inventory (14%); pricing is cheaper (10%); and just 7% of consumer prefer online (i.e. digital representative) customer service to in-person.

U.S. and U.K. consumers agree convenience reigns supreme for online shopping

Nearly half of U.S. consumers (47%) and U.K. consumers (43%) plan to continue to shop more online after the pandemic ends because it's convenient.

Men and women agree convenience is key

Men (46%) and women (44%) are both most likely to continue to continue to shop more online after the pandemic ends because it's convenient.

U.S. men are the most likely to continue to shop online due to convenience; U.K. women are most likely to continue due to speed

U.S. men (49%) are the most likely to continue to shop online because it's convenient, compared to U.S. women (46%), U.K. men (45%) and U.K. women (40%).
U.K. women (25%) are the most likely to continue to shop online because it's quicker, compared to U.S. women (21%), U.S. men (16%) and U.K. men (22%).

Gen Zs are the most likely to continue to shop online due to availability of products; baby boomers most likely to continue due to speed

Gen Zs (22%) are the most likely to continue to shop online because of product availability, compared to millennials (9%), Gen Xs (14%) and baby boomers (14%).

baby boomers (24%) are the most likely to continue to shop online because it's quicker, compared to Gen Zs (13%), millennials (21%) and Gen Xs (19%).

U.S. millennials are the most likely to continue to shop online due to convenience

Across the U.S. millennials are the most likely to continue shopping online after the pandemic due to convenience. Across the U.K. Gen Xs are the most likely to do the same:

- U.S. Gen Zs (42%); U.K. Gen Zs (34%)
- U.S. millennials (53%); U.K. millennials (48%)
- U.S. Gen Xs (49%); U.K .Gen Xs (53%)
- U.S. baby boomers (49%); U.K. baby boomers (38%)

Question 4

> During the COVID-19 pandemic have you submitted a complaint to a brand's customer service department?

Answers	Percent
Yes	13.45%
No	85.05%
I don't know	1.50%

More than four in five (85%) consumers have not submitted a complaint to a brand's customer service department during the COVID-19 pandemic, while 14% have (down 18% pre-COVID-19-19).

U.K. consumers are slightly more likely to have submitted a complaint

One in seven (14%) U.K. consumers have submitted a complaint to a brand's customer service department during the COVID-19 pandemic, compared to 12.5% of U.S. consumers.

Men are more likely to have submitted a complaint during the pandemic

One-in-six (16%) men have submitted a complaint to a brand's customer service department during the COVID-19 pandemic, compared to 12% of women.

U.K. men are the most likely to have submitted a complaint during the pandemic

U.K. men (16%) are the most likely to have submitted a complaint to a brand's customer service department during the COVID-19 pandemic, compared to U.K. women (12%), U.S. men (13%) and U.S. women (12%).

Millennials are the most likely to have submitted a complaint during the pandemic

millennials (18%) are the most likely to have submitted a complaint to a brand's customer service department during the COVID-19 pandemic, compared to Gen Zs (16%), Gen Xs (11%) and baby boomers (10%).

U.K. millennials are the most likely to have submitted a complaint during the pandemic

Across the U.S. and U.K., U.K. millennials are the most likely to have submitted a complaint to a brand's customer service department during the COVID-19 pandemic:

- U.S. Gen Zs (16%); U.K. Gen Zs (17%)
- U.S. millennials (16%); U.K. millennials (18%)
- U.S. Gen Xs (11%); U.K. Gen Xs (12%)
- U.S. baby boomers (10%); U.K. baby boomers (10%)

Question 5

> How long did it take for the company to get back to you and then resolve your issue?

Answers	Percent
Less than one day	16.36%
One-to-three days	37.17%
Four-to-seven days	14.87%
More than a week	10.04%
The company never resolved my issue	21.56%

More than a third (37%) of consumers had their issue resolved in one-to-three days (down 2% since pre-COVID-19). One in seven (16%) had their issue resolved in less than one day (up 1% since pre-COVID-19), and another 15% had their issue resolved in four-to-seven days (down 1% since pre-COVID-19). One-in-10 (10%) had their issue resolved in more than a week (down 3% since pre-COVID-19). More than a quarter (22%) never had their issue resolved (up 6% since pre-COVID-19).

U.S. consumers had their issues resolved faster than U.K. consumers

Nearly two-in-five (38%) US consumers had their issues resolved in one-to-three days, compared to U.K. consumers (36%). More than a quarter (26%) of U.K. consumers never had their issues resolved, compared to 17% of U.S. consumers.

The majority of men and women had their issue resolved in one-to-three days

The majority of men (39%) and women (35%) had their issue resolved in one-to-three days, compared to:

- Less than one day - men (15%); women (18%)
- Four-to-seven days - men (14%); women (16%)
- More than a week - men (10%); women (10%)

More than one in five women (21%) and men (22%) never had their issue resolved.

Gen Zs most likely to have their issue resolved in one-to-three days

The majority of Gen Zs (53%) had their issue resolved in one-to-three days, compared to millennials (38%), Gen Xs (22%) and baby boomers (34%):

Baby boomers (23%) and Gen Xs (22%) are nearly twice as likely than Gen Zs (13%) and millennials (11%) to have their issue resolved in less than a day.

Baby boomers (27%) are also the most likely to say their issue was never resolved, compared to Gen Xs (22%), millennials (20%) and Gen Zs (16%).

> How long did it take for the company to get back to you and then resolve your issue?

U.S. men are the most likely to have their issues resolved in one-to-three days

U.S. men (54%) are the most likely to have their issue resolved in one-to-three days, compared to U.S. women (32%), U.K. men (34%) and U.K. women (40%):

- Less than one day
  - U.S. women (19%)
  - U.S. men (17%)
  - U.K. women (15%)
  - U.K. men (14%)
- Four-to-seven days
  - U.S. women (19%)
  - U.S. men (11%)
  - U.K. women (11%)
  - U.K. men (14%)
- More than a week
  - U.S. women (12%)
  - U.S. men (3%)
  - U.K. women (6%)
  - U.K. men (12%)
- Never had their issue resolved
  - U.S. women (18%)
  - U.S. men (14%)
  - U.K. women (28%)
  - U.K. men (25%)

U.K. baby boomers most likely to never have their issue resolved

U.K. baby boomers (33%) are the most likely to never have their issue resolved, compared to U.S. baby boomers (23%), U.S. Gen Xs (13%), U.K. Gen Xs (33%), U.S. millennials (15%), U.K. millennials (23%), U.S. Gen Zs (14%) and U.K. Gen Zs (17%):

- Less than one day
  - U.S. Gen Zs (14%)
  - U.K. Gen Zs (13%)
  - U.S. millennials (8%)
  - U.K. millennials (13%)
  - U.S. Gen Xs (27%)
  - U.K. Gen Xs (19%)
  - U.S. baby boomers (23%)
  - U.K. baby boomers (24%)
- One-to-three days
  - U.S. Gen Zs (50%)
  - U.K. Gen Zs (57%)
  - U.S. millennials (46%)
  - U.K. millennials (33%)
  - U.S. Gen Xs (20%)
  - U.K. Gen Xs (24%)
  - U.S. baby boomers (34%)
  - U.K. baby boomers (33%)
- Four-to-seven days
  - U.S. Gen Zs (28%)
  - U.K. Gen Zs (9%)
  - U.S. millennials (12%)
  - U.K. millennials (18%)
  - U.S. Gen Xs (27%)
  - U.K. Gen Xs (10%)
  - U.S. baby boomers (14%)
  - U.K. baby boomers (5%)
- More than a week
  - U.S. Gen Zs (5%)
  - U.K. Gen Zs (4%)
  - U.S. millennials (19%)
  - U.K. millennials (15%)
  - U.S. Gen Xs (13%)
  - U.K. Gen Xs (14%)
  - U.S. baby boomers (6%)
  - U.K. baby boomers (5%)

Question 6

> Have you left a negative review for a brand/company during the COVID-19 pandemic?

Answers	**Percent**
Yes	10.00%
No	89.25%
I don't know	0.75%

Just one-in-10 (10%) consumers have left a negative review for a brand/company during the COVID-19 pandemic (down 30% since pre-COVID-19), 89% have not.

U.K. consumers are slightly more likely to leave a bad review during the pandemic

More than one-in-10 (11%) U.K. consumers have left a negative review for a brand/company during the COVID-19 pandemic, while just 9% of U.S. consumers have done the same.

Men are more likely to leave a bad review during the pandemic

One-in-eight (13%) men have left a negative review for a brand/company during the COVID-19 pandemic, compared to 8% of women.

U.K. men are the most likely to leave a bad review during the pandemic

U.K. men (14%) are more than twice as likely to have left a negative review for a brand/company during the COVID-19 pandemic than U.K. women (6%), compared to U.S. men (9%) and U.S. women (9%).

Millennials are the most likely to leave a bad review during the pandemic

Millennials (16%) are the most likely to have left a negative review for a brand/company during the COVID-19 pandemic, compared to Gen Zs (11%), Gen Xs (8%) and baby boomers (7%).

U.K. millennials are the most likely to leave a bad review during the pandemic

Across the U.S. and U.K., U.K. millennials are the most likely to have left a negative review for a brand/company during the COVID-19 pandemic:

- U.S. Gen Zs (10%); U.K. Gen Zs (12%)
- U.S. millennials (13%); U.K. millennials (17%)
- U.S. Gen Xs (9%); U.S. Gen Xs (7%)
- U.S. baby boomers (6%); U.K. baby boomers (8%)

Question 7

Did you speak with a customer service representative (e.g., a human being or digital representative) about the problem you were having before leaving the negative review?

Answers	Percent
Yes	63.00%
No	35.00%
I don't know	2.00%

Nearly two thirds (63%) of consumers spoke with a customer service representative (e.g., a human being or digital representative) about the problem they were having before leaving a negative review, while more than a third (35%) did not.

U.S. consumers are more likely to speak with a customer service rep before leaving a negative review

Two thirds (66%) of U.S. consumers spoke with a customer service representative (e.g., a human being or digital representative) about the problem they were having before leaving a negative review, compared to 60% of U.K. consumers.

Men and women are equally likely to speak with a customer service rep before leaving a bad review during the pandemic

Nearly two-thirds (63%) of both men and women spoke with a customer service representative before leaving a negative review.

U.S. men are most likely to speak with a customer service rep before leaving a bad review during the pandemic

U.S. men (71%) are the most likely to have spoken to a customer service representative before leaving a negative review, compared to U.S. women (65%), U.K. women (57%) and U.K. men (61%).

Gen Zs are most likely to speak with a customer service rep before leaving a bad review during the pandemic

Gen Zs (83%) are the most likely to speak with a customer service representative before leaving a negative review, compared to millennials (61%), Gen Xs (62%) and baby boomers (46%).

U.S. Gen zs most likely to speak with a customer service rep before leaving a bad review during the pandemic

Across the U.S. and U.K., U.S. Gen Zs are the most likely to speak with a customer service representative before leaving a negative review:

- U.S. Gen Zs (86%); U.K. Gen Zs (81%)
- U.S. millennials (62%); U.K. millennials (61%)
- U.S. Gen Xs (85%); U.K. Gen Xs (35%)
- U.S. baby boomers (50%); U.K. baby boomers (41%)

Question 8

> Of the following, which best describes why you left a negative review during the COVID-19 pandemic?

Answers	Percent
I did not receive a delivery or delivery times were too long	28.00%
I was not able to get in touch with customer service or wait times were too long	19.00%
The product/service did not meet my expectations	36.50%
The company never responded to a complaint I submitted	14.00%
I don't know	2.50%

More than a third (37%) of consumers left a negative review during the pandemic because the product/service didn't meet their expectations. Other reasons consumers left negative reviews were:

- They did not receive a delivery or the delivery times were too long (28%);
- They were not able to get in touch with customer service or the wait times were too long (19%); and
- The company never responded to a complaint they submitted (14%)

U.K. consumers were more likely than U.S. Consumers to leave a negative review because they didn't receive a response from the company about a complaint

One in six (16%) U.K. consumers left a negative review during the pandemic because the company never responded to a complaint they submitted, compared to just over one-in-10 (11%) U.S. consumers.

The majority of both men and women left a negative review during the pandemic because the product/service did not meet their expectations

More than a third of men (38%) and women (35%) left a negative review during the pandemic because the product/service didn't meet their expectations, compared to:

- I did not receive a delivery or delivery times were too long - men (28%); women (28%);
- I was not able to get in touch with customer service or wait times were too long - men (21%); women (19%);
- The company never responded to a complaint I submitted - men (13%); women (15%).

> Of the following, which best describes why you left a negative review during the COVID-19 pandemic?

U.K. women are the most likely to leave a negative review during the pandemic because they did not receive a delivery or the delivery times were too long

U.K. women (35%) are the most likely to to leave a negative review during the pandemic because they did not receive a delivery or the delivery times were too long, compared to U.S. women (26%), U.K. men (26%) and U.K. women (33%):

- I was not able to get in touch with customer service or wait times were too long
  - U.S. women (19%)
  - U.S. men (21%)
  - U.K. women (17%)
  - U.K. men (19%)
- The product/service did not meet my expectations
  - U.S. women (37%)
  - U.S. men (33%)
  - U.K. women (30%)
  - U.K. men (39%)
- The company never responded to a complaint I submitted
  - U.S. women (14%)
  - U.S. men (4%)
  - U.K. women (17%)
  - U.K. men (16%)

Gen Xs are the most likely to leave a negative review during the pandemic because the product/ service did not meet expectations

Gen Xs (42%) are the most likely to to leave a negative review during the pandemic because the product/service did not meet their expectations, compared to Gen Zs (30%), millennials (36%) and baby boomers (41%):

- I did not receive a delivery or delivery times were too long
  - Gen Zs (30%)
  - Millennials (24%)
  - Gen Xs (12%)
  - Baby boomers (27%)
- I was not able to get in touch with customer service or wait times were too long
  - Gen Zs (17%)
  - Millennials (20%)
  - Gen Xs (31%)
  - Baby boomers (14%)
- The company never responded to a complaint I submitted
  - Gen Zs (7%)
  - Millennials (17%)
  - Gen Xs (15%)
  - Baby boomers (19%)

U.K. women are the most likely to leave a negative review during the pandemic because they did not receive a delivery or the delivery times were too long

U.K. women (35%) are the most likely to to leave a negative review during the pandemic because they did not receive a delivery or the delivery times were too long, compared to U.S. women (26%), U.K. men (26%) and U.K. women (33%):

- I was not able to get in touch with customer service or wait times were too long
  - U.S. women (19%)
  - U.S. men (21%)
  - U.K. women (17%)
  - U.K. men (19%)
- The product/service did not meet my expectations
  - U.S. women (37%)
  - U.S. men (33%)
  - U.K. women (30%)
  - U.K. men (39%)
- The company never responded to a complaint I submitted
  - U.S. women (14%)
  - U.S. men (4%)
  - U.K. women (17%)
  - U.K. men (16%)

Gen Xs are the most likely to leave a negative review during the pandemic because the product/ service did not meet expectations

Gen Xs (42%) are the most likely to to leave a negative review during the pandemic because the product/service did not meet their expectations, compared to Gen Zs (30%), millennials (36%) and baby boomers (41%):

- I did not receive a delivery or delivery times were too long
  - Gen Zs (30%)
  - Millennials (24%)
  - Gen Xs (12%)
  - Baby boomers (27%)
- I was not able to get in touch with customer service or wait times were too long
  - Gen Zs (17%)
  - Millennials (20%)
  - Gen Xs (31%)
  - Baby boomers (14%)
- The company never responded to a complaint I submitted
  - Gen Zs (7%)
  - Millennials (17%)
  - Gen Xs (15%)
  - Baby boomers (19%)

Question 9

> Of the following, which communication channel do you prefer to use to engage with a brand/company for general queries during the COVID-19 pandemic?

Answers	Percent
Phone	23.65%
Online Chat	23.70%
Email	33.65%
Mobile App	6.50%
Social Media	7.75%
I don't know	4.75%

More than a third (34%) of consumers prefer to engage with a brand/company for general queries via email during the COVID-19 pandemic. Other top channels include phone (24%); online chat (24%); social media (8%); and mobile app (7%).

U.S. consumers more likely to prefer phone; U.K. Consumers prefer email

Both U.S. consumers (31%) and U.K. consumers (37%) prefer email for general queries during the pandemic, but U.S. consumers (28%) are more likely than U.K. consumers (19%) to prefer the phone, and U.K. consumers (30%) are more likely than U.S. consumers (18%) to prefer online chat.

Gen Zs, millennials, Gen Xs and baby boomers prefer email

Across the board, the majority of Gen Zs (26%), millennials (30%), Gen Xs (37%) and baby boomers (39%) prefer to use email to engage with a brand/company for general queries during the pandemic.

However, millennials (10%) and Gen Zs (16%) are significantly more likely than Gen Xs (6%) and baby boomers (3%) to prefer social media. And, baby boomers (28%) are the most likely to prefer the phone, compared to Gen Xs (27%) millennials (19%) and Gen Zs (25%).

Men and women prefer to use email when engaging with a brand/company

The majority of men (36%) and women (32%) prefer to use email to engage with a brand/company for general queries during the pandemic, compared to:

- Phone - men (25%); women (24%)
- Online Chat - men (23%); women (24%)
- Mobile App - men (6%); women (7%)
- Social Media - men (6%); women (10%)

> Of the following, which communication channel do you prefer to use to engage with a brand/company for general queries during the COVID-19 pandemic?

U.K. women are most likely to prefer to engage with brands via online chat during the pandemic

U.K. women (31%) are the most likely to prefer to engage with a brand/company for general queries during the COVID-19 pandemic via online chat, compared to U.K. men (29%), U.S. women (20%) and U.K. women (11%)

- Phone
  - U.S. women (27%)
  - U.S. men (33%)
  - U.K. women (15%)
  - U.K. men (22%)
- Email
  - U.S. women (29%)
  - U.S. men (37%)
  - U.K. women (38%)
  - U.K. men (36%)
- Mobile App
  - U.S. women (9%)
  - U.S. men (7%)
  - U.K. women (5%)
  - U.K. men (5%)
- Social Media
  - U.S. women (10%)
  - U.S. men (6%)
  - U.K. women (7%)
  - U.K. men (7%)

U.S. Gen Xs are most likely to prefer to engage via phone

U.S. Gen Xs (32%) are most likely to prefer the phone for general queries, compared to U.S. Gen Zs (27%), U.K. Gen Zs (22%), U.S. millennials (26%), U.K. millennials (14%), U.K. Gen Xs (24%) U.S. baby boomers (30%) and U.K. baby boomers (24%).

- Online Chat
  - U.S. Gen Zs (21%)
  - U.K. Gen Zs (26%)
  - U.S. millennials (20%)
  - U.K. millennials (34%)
  - U.S. Gen Xs (14%)
  - U.K. Gen Xs (20%)
  - U.S. baby boomers (13%)
  - U.K. baby boomers (26%)

- Email
  - U.S. Gen Zs (21%)
  - U.K. Gen Zs (31%)
  - U.S. millennials (23%)
  - U.K. millennials (35%)
  - U.S. Gen Xs (32%)
  - U.K. Gen Xs (42%)
  - U.S. baby boomers (38%)
  - U.K. baby boomers (42%)

- Mobile App
  - U.S. Gen Zs (8%)
  - U.K. Gen Zs (4%)
  - U.S. millennials (13%)
  - U.K. millennials (5%)
  - U.S. Gen Xs (12%)
  - U.K. Gen Xs (6%)
  - U.S. baby boomers (7%)
  - U.K. baby boomers (3%)

- Social Media
  - U.S. Gen Zs (18%)
  - U.K. Gen Zs (14%)
  - U.S. millennials (11%)
  - U.K. millennials (9%)
  - U.S. Gen Xs (6%)
  - U.K. Gen Xs (6%)
  - U.S. baby boomers (4%)
  - U.K. baby boomers (1%)

2 / Key findings

Brand loyalty and self-service in the COVID-19 era

Question 1

> Would you stop doing business with a company during the COVID-19 pandemic if you received poor customer experience (e.g., the business is slow to respond, inventory is out of stock, etc.)?

Answers	Percent
Yes	42.50%
No	34.25%
I don't know	23.25%

More than two-in-five (43%) consumers (down 30% from pre-COVID-19) would stop doing business with a company during the COVID-19 pandemic if they received poor customer experience, compared to 34% who would not (up 21% from pre-COVID-19), and 23% who don't know (up 9% since pre-COVID-19).

More U.K. consumers would stop doing business with a brand due to negative CX during the pandemic

Nearly half (46%) of U.K. consumers would stop doing business with a company during the COVID-19 pandemic if they received poor customer experience, compared to 39% of U.S. consumers.

Men are more likely to stop doing business with a brand or company due to negative CX during the pandemic

More men (48%) than women (39%) would stop doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience.

U.K. men are the most likely to stop doing business with a brand or company due to negative cx during the pandemic

U.K. men (48%) are the most likely to stop doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience, compared to U.S. men (46%), U.K. women (43%), U.S. women (36%).

Gen Zs are the least likely to stop doing business with a brand or company due to negative CX during the pandemic

Two-in-five (40%) Gen Zs would not stop doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience, compared to millennials (35%), Gen Xs (31%) and baby boomers (36%).

U.K. millennials are the most likely to stop doing business with a brand or company due to negative cx during the pandemic

Across the U.S. and U.K., U.K. millennials are the most likely to stop doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience:

- U.S. Gen Zs (35%); U.K. Gen Zs (45%)
- U.S. millennials (43%); U.K. millennials (49%)
- U.S. Gen Xs (42%); U.K. Gen Xs (42%)
- U.S. baby boomers (34%); U.K. baby boomers (45%)

Question 2

Have you stopped doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience?

Answers	Percent
Yes	15.70%
No	81.35%
I don't know	2.95%

Just 16% of consumers have stopped doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience (down 23% since pre-COVID-19), while eight-in-10 (81%) have not (up 24% since pre-COVID-19).

More U.K. consumers have stopped doing business with a brand due to negative CX during the pandemic

More U.K. consumers (18%) than U.S. consumers (13%) have stopped doing business with a brand or company during the COVID-19 pandemic because of a negative customer experience.

Millennials are the most likely to stop doing business with a brand or company due to negative CX during the pandemic

More than one-in-five (21%) millennials have stopped doing business with a brand or company during the pandemic because of a negative customer experience, compared to Gen Zs (17%), Gen Xs (15%) and baby boomers (11%).

U.S. millennials are the most likely to stop doing business with a brand or company due to negative CX; U.K. baby boomers least likely

Across the U.S. and U.K., U.S. millennials are the most likely to have stopped doing business with a brand or company due to a negative customer experience, and baby boomers are the least likely:

- U.S. Gen Zs (13%); U.K. Gen Zs (21%)
- U.S. millennials (16%); U.K. millennials (24%)
- U.S. Gen Xs (13%); U.K. Gen Xs (17%)
- U.S. baby boomers (11%); U.K. baby boomers (10%)

Men are more likely to stop doing business with a brand or company due to negative CX during the pandemic

More men (18%) than women (14%) have stopped doing business with a brand or company during the pandemic because of a negative customer experience.

U.K. men are the most likely to stop doing business with a brand or company due to negative cx during the pandemic

U.K. men (19%) are the most likely to have stopped doing business with a brand or company during the pandemic because of a negative customer experience, compared to U.S. men (15%), U.K. women (16%) and U.S. women (13%).

Question 3

> When doing business with a company during the COVID-19 pandemic, is it important to you to receive personalized communication (e.g., customized recommendations, etc.) over email, chat, etc.?

Answers	Percent
Yes	52.55%
No	38.50%
I don’t know	8.95%

More than half (53%) of consumers (up 3% since pre-COVID-19) believe it’s important to receive personalized communication over email, chat, social media, etc., when doing business with a company during the COVID-19 pandemic, and nearly two in five (39%) do not believe it’s important (down 3% since pre-COVID-19).

More U.S. consumers value personalized communication with brands

Nearly three-in-five (57%) U.S. consumers believe it’s important to receive personalized communication over email, chat, social media, etc., during the pandemic. That’s compared to less than half (48%) of U.K. consumers.

More than half of both men and women agree on importance of personalized communication

Just over half of women (53%) and men (53%) believe it’s important to receive personalized communication over email, chat, social media, etc., when doing business with a company during the pandemic.

Personalized communication over chat, social is most important to U.S. men and women

More than half of U.S. men (57%) and U.S. women (57%) believe it’s important to receive personalized communication over email, chat, social media, etc., when doing business with a company during the pandemic, compared to U.K. men (51%) and U.K. women (44%).

Personalized communication is least important to Gen Xs

Gen Xs (42%) are the most likely to believe it’s not important to receive personalized communication over email, chat, social media, etc., when doing business with a company during the pandemic compared to Gen Zs (37%), millennials (38%) and baby boomers (39%).

Personalized communication is most important to U.S. millennials; Gen Zs

Across the U.S. and U.K., U.S. millennials and Gen Zs are the most likely to believe it’s important to receive personalized communication over email, chat, social media, etc., when doing business with a company during the pandemic:

- U.S. Gen Zs (58%); U.K. Gen Zs (51%)
- U.S. millennials (58%); U.K. millennials (53%)
- U.S. Gen Xs (53%); U.K. Gen Xs (49%)
- U.S. baby boomers (55%); U.K. baby boomers (43%)

Question 4

> If you were experiencing difficulty with a product/service during the pandemic would you rather reach out to customer service (e.g., via phone, chat) or find the solution yourself (e.g., help center)?

Answers	Percent
I would rather reach out to a customer service representative	59.35%
I would rather find the solution myself by searching online	35.25%
I don't know	5.40%

Nearly six-in-10 (59%) consumers would rather reach out to customer service if experiencing difficulty with a product/service during the pandemic (down 10% since pre-COVID-19), however more than a third (35%) would rather find a solution themselves online (up 7% since pre-COVID-19).

U.K. consumers are more likely to want to find a customer service solution on their own

More U.K. consumers (41%) than U.S. consumers (30%) would rather find a solution themselves online during the pandemic, while more U.S. consumers (66%) than U.K. consumers (53%) would rather reach out to customer service if experiencing difficulty with a product/service during the pandemic.

More women than men would rather reach out to a customer service rep during the pandemic

Nearly two-thirds of women (62%) would rather reach out to customer service if experiencing difficulty with a product/service during the pandemic, compared to men (56%).

U.K. men are the most likely to want to find the solution themselves; U.S. women are the most likely to want to reach out to a customer service rep during the pandemic

More than two-in-five U.K. men (42%) would rather find a solution themselves online during the pandemic, compared to U.K. women (39%), U.S. men (33%) and U.S. women (28%).

Two thirds (66%) of U.S. women would rather reach out to customer service if they experience difficulty with a product/service during the pandemic, compared to U.S. men (65%), U.K. women (54%) and U.K. men (52%).

Gen Zs and millennials more likely to want to find the solution themselves during them pandemic

More than two-in-five Gen Zs (43%) and millennials (43%) would rather find a solution themselves online if experiencing difficulty with a product/service during the pandemic, compared to Gen Xs (32%) baby boomers (27%).

The majority of baby boomers (69%) and Gen Xs (62%) would rather reach out to customer service, compared to Gen Zs (52%) and millennials (52%).

> If you were experiencing difficulty with a product/service during the pandemic would you rather reach out to customer service (e.g., via phone, chat) or find the solution yourself (e.g., help center)?

U.K. millennials are the most likely to want to find the solution themselves during the pandemic

Across the U.S. and U.K., U.K. millennials are the most likely to rather find a solution themselves online

- U.S. Gen Zs (43%); U.K. Gen Zs (42%)
- U.S. millennials (34%); U.K. millennials (50%)
- U.S. Gen Xs (24%); U.K. Gen Xs (38%)
- U.S. baby boomers (25%); U.K. baby boomers (31%)

More U.S. baby boomers and U.S. Gen Xs would rather reach out to customer service:

- U.S. Gen Zs (51%); U.K. Gen Zs (54%)
- U.S. millennials (60%); U.K. millennials (46%)
- U.S. Gen Xs (71%); U.K. Gen Xs (54%)
- U.S. baby boomers (71%); U.K. baby boomers (64%)

Question 5

Why would you rather find the solution yourself?

Answers	Percent
I prefer not to talk to a human being	12.48%
It's faster to find the solution myself (e.g. due to long wait times, etc.)	52.77%
I think the answer online will be more accurate	9.79%
I can find a response any time of day (i.e., versus having to reach out during open hours)	22.27%
I don't know	2.70%

More than half (53%) of consumers who would rather find the solution themselves during the pandemic think it's faster. Other reasons why consumers would rather find the solution themselves include, they can find a response any time of day (22%), they prefer not to talk to a human being (13%), and they think the answer online will be more accurate (10%).

U.S. and U.K. consumers want to find a customer service solution themselves because it's faster

The majority of both U.S. (52%) and U.K. (53%) consumers would rather find the solution themselves during the pandemic because they think it's faster.

Other reasons why U.S. consumers would rather find the solution themselves include they can find a response any time of day (22%), they prefer not to talk to a human being (14%), and they think the answer online will be more accurate (9%).

Other reasons why U.K. consumers would rather find the solution themselves include they can find a response any time of day (22%), they prefer not to talk to a human being (12%), and they think the answer online will be more accurate (10%).

Men and women agree they would rather find the solution themselves because it's faster

Men (54%) and women (51%) agree they would rather find the solution themselves during the pandemic because it's faster, compared to:
They prefer not to talk to a human being - men (11%); women (14%)
The answer online will be more accurate - men (11%); women (9%)
They can find a response at any time of day - men (20%); women (248%)

> Why would you rather find the solution yourself?

U.K. men most likely to find the solution themselves because it's faster

More than half of U.K. men (55%) would rather find the solution themselves because it's faster, compared to U.S. women (52%), U.S. men (52%) and U.K. women (50%).

- They prefer not to talk to a human being
  - U.S. women (16%)
  - U.S. men (8%)
  - U.K. women (11%)
  - U.K. men (12%)
- The answer online will be more accurate
  - U.S. women (6%)
  - U.S. men (16%)
  - U.K. women (12%)
  - U.K. men (9%)
- They can find a response at any time of day
  - U.S. women (24%)
  - U.S. men (18%)
  - U.K. women (25%)
  - U.K. men (21%)

Gen Zs are more than five times as likely as baby boomers to rather find the solution themselves because they prefer not to talk to a human

Gen Zs (21%) are the most likely to find the solution themselves because they prefer not to talk to a human, compared to millennials (13%), Gen Xs (10%) and baby boomers (4%)

- It's faster to find the solution themselves
  - Gen Zs (50%)
  - Millennials (57%)
  - Gen Xs (56%)
  - Baby boomers (51%)
- The answer online will be more accurate
  - Gen Zs (9%)
  - Millennials (6%)
  - Gen Xs (10%)
  - Baby boomers (11%)
- They can find a response at any time of day
  - Gen Zs (21%)
  - Millennials (20%)
  - Gen Xs (22%)
  - Baby boomers (31%)

U.K. baby boomers are most likely to find the solution themselves because they can find a response any time of day

U.K. baby boomers (34%) are the most likely to find the solution themselves because they can find a response at any time of day compared to U.K. Gen Zs (21%), U.S. Gen Zs (20%), U.S. millennials (20%), U.K. millennials (20%), U.S. Gen Xs (18%), U.K. Gen Xs (24%), and U.S. baby boomers (29%).

- Prefer not to talk to a human
  - U.S. Gen Zs (19%)
  - U.K. Gen Zs (22%)
  - U.S. millennials (13%)
  - U.K. millennials (13%)
  - U.S. Gen Xs (15%)
  - U.K. Gen Xs (7%)
  - U.S. baby boomers (6%)
  - U.K. baby boomers (2%)

- It's faster to find the solution themselves
  - U.S. Gen Zs (49%)
  - U.K. Gen Zs (50%)
  - U.S. millennials (57%)
  - U.K. millennials (57%)
  - U.S. Gen Xs (58%)
  - U.K. Gen Xs (54%)
  - U.S. baby boomers (51%)
  - U.K. baby boomers (50%)

- The answer online will be more accurate
  - U.S. Gen Zs (10%)
  - U.K. Gen Zs (7%)
  - U.S. millennials (7%)
  - U.K. millennials (6%)
  - U.S. Gen Xs (6%)
  - U.K. Gen Xs (12%)
  - U.S. baby boomers (10%)
  - U.K. baby boomers (13%)

Question 6

> Which of the following customer service models do you feel would best understand your request and assist you properly during the COVID-19 pandemic (i.e., answer questions, solve an issue, etc.?)

Answers	Percent
Customer service representative (e.g., online, in-person, via phone, etc.)	79.10%
Digital company representative (e.g., chatbot, conversational Interactive voice respo nse (IVR) etc.)	13.50%
I don't know	7.40%

The majority of consumers (79%) feel a live customer service representative would best understand their request and assist them properly during the COVID-19 pandemic (down 7% since pre-COVID-19), compared to 14% who feel a digital company representative (e.g. chatbot, IVR, etc.) would best understand their request and properly assist them (up 6% since pre-COVID-19).

U.K. consumers are slightly more likely to feel live customer service reps would best understand and assist their request

U.K. consumers (80%) are more likely than U.S. consumers (78%) to feel a live customer service representative would best understand their request and assist them properly during the COVID-19 pandemic.

Women are more likely than men to feel digital company reps would best understand and assist their request during the pandemic

One-in-seven (14%) women feel a digital company representative would best understand their request and assist them properly during the COVID-19 pandemic, compared to 12% of men.

U.S. women are the most likely to feel digital company reps would best understand and assist their request during the pandemic

More than one-in-seven (15%) U.S. women feel a digital company representative would best understand their request and assist them properly during the COVID-19 pandemic, compared to U.K. women (14%), U.S. men (12%) and U.K. men (12%).

Gen Zs are the most likely to feel digital company reps would best understand and assist their request during the pandemic

Gen Zs (26%) and millennials (17%) are more than twice as likely to feel a digital company representative would best understand their request and assist them properly during the COVID-19 pandemic, compared to Gen Xs (8%) baby boomers (8%).

U.S. Gen Zs are the most likely to feel digital company reps would best understand and assist their request during the pandemic

Across the U.S. and U.K., U.S. Gen Zs are the most likely to feel a digital company representative would best understand their request and assist them properly:

- U.S. Gen Zs (30%); U.K. Gen Zs (22%)
- U.S. millennials (18%); U.K. millennials (16%)
- U.S. Gen Xs (9%); U.K. Gen Xs (7%)
- U.S. baby boomers (8%); U.K. baby boomers (9%)

Question 7

> **Have you switched to a direct-to-consumer brand (i.e., sells straight to consumers rather than through a retailer, e.g., Everlane, Casper, etc.) for any products or services you buy during COVID-19?**

Answers	Percent
Yes	15.25%
No	76.15%
I don't know	8.60%

Nearly one-in -ix (15%) (down 3% since pre-COVID-19) consumers have switched to a direct-to-consumer (D2C) brand for a product or service they buy during the pandemic, and 76% have not (up 4% since pre-COVID-19).

More U.K. consumers have switched to D2C brands since COVID-19

Nearly one-in-six (15%) U.K. consumers and U.S. consumers have switched to a direct-to-consumer brand for a product or service they buy during the pandemic, while 76% of U.S. consumers and 77% of U.K. consumers have not.

More men have switched to a direct-to-consumer brand in the last year during the pandemic

Men (17%) are more likely than women (15%) to have switched to a D2C brand during the pandemic.

U.S. men are the most likely to have switched to a direct-to-consumer brand during the pandemic

Nearly one-in-five (18%) U.S. men have switched to a D2C brand, compared to U.K. men (16%), U.S. women (15%) and U.K. women (13%).

Gen Zs and millennials are more likely to have switched to a direct-to-consumer brand during the pandemic than baby boomers

Gen Zs (21%) and millennials (21%) are more likely to have switched to a D2C brand during the pandemic, compared to Gen Xs (11%) and baby boomers (9%).

U.S. millennials are the most likely to have switched to a direct-to- consumer brand during the pandemic

Across the U.S. and U.K., U.S. millennials (23%) are the most likely to have switched to a D2C brand during the pandemic:

- U.S. Gen Zs (19%); U.K. Gen Zs (22%)
- U.S. millennials (23%); U.K. millennials (20%)
- U.S. Gen Xs (17%); U.K. Gen Xs (6%)
- U.S. baby boomers (8%); U.K. baby boomers (10%)

Question 8

> Thinking about the last time you switched to a direct-to-consumer brand (during COVID-19), which of the following best describes why you switched?

Answers	Percent
The product is cheaper	26.56%
The customer service is better (i.e. faster response times, more knowledgeable about product, etc.)	23.93%
More personalization	9.18%
Faster or cheaper shipping options	14.43%
Better quality product	11.15%
More reliable product availability (i.e. product was in stock)	13.11%
I don't know	1.64%

The majority of consumers who switched to a direct-to-consumer (D2C) brand last switched because the product is cheaper (27%). Other reasons consumers switched include better customer service (24%), faster or cheaper shipping options (14%), more reliable product availability (13%), better quality product (11%) and more personalization (9%).

U.K. and U.S. consumers switch to D2C during the pandemic due to price

The majority of U.K. consumers (27%) and U.S. consumers (26%) who switched to a D2C brand during the pandemic last switched because of a cheaper product.

Other reasons U.S. consumers switched include better customer service (23%), faster or cheaper shipping options (17%), more reliable product availability (12%), better quality product (10%) and more personalization (10%).

Other reasons U.K. consumers switched include better customer service (25%), more reliable product availability (14%), faster or cheaper shipping options (12%), better quality product (12%) and more personalization (8%).

Majority of men and women switched to a direct-to-consumer brand because the product is cheaper

The majority of men (27%) and women (26%) switched to a D2C brand during the pandemic because the product is cheaper, compared to:

- Customer service is better
  - Men (23%); Women (25%)
- More personalization
  - Men (8%); Women (10%)
- Faster or cheaper shipping options
  - Men (16%); Women (13%)
- Better quality product
  - Men (11%); Women (12%)
- More reliable product availability
  - Men (14%); Women (13%)

> Thinking about the last time you switched to a direct-to-consumer brand (during COVID-19), which of the following best describes why you switched?

U.K. women are the most likely to switch to a direct-to-consumer brand because the customer experience is better

The majority of U.K. women (26%) switched to a D2C brand during the pandemic because the customer experience is better, compared to U.S. women (23%), U.K. men (23%) and U.S. men (23%)

- The product is cheaper
  - U.S. men (25%); U.K. men (28%)
  - U.S. women (26%); U.K. women (26%)
- More personalization
  - U.S. men (4%); U.K. men (10%)
  - U.S. women (13%); U.K. women (4%)
- Faster or cheaper shipping options
  - U.S. men (23%); U.K. men (12%)
  - U.S. Women (14%); U.K. women (12%)
- Better quality product
  - U.S. men (8%); U.K. men (12%)
  - U.S. women (11%); U.K. women (12%)
- More reliable product availability
  - U.S. men (15%); U.K. men (13%
  - U.S. women (11%); U.K. women (16%)

Gen Xs are the most likely to switch to a direct-to-consumer brand during the pandemic because the customer service is better

millennials (20%) are nearly twice as likely as baby boomers (10%), Gen Xs (9%) or Gen Zs (12%) to have switched to a D2C brand during the pandemic because of faster or cheaper shipping options.

- Product is cheaper
  - Gen Zs (30%)
  - Millennials (29%)
  - Gen Xs (15%)
  - baby boomers (29%)
- Customer service is better
  - Gen Zs (23%)
  - Millennials (23%)
  - Gen Xs (32%)
  - baby boomers (27%)
- More personalization
  - Gen Zs (12%)
  - Millennials (6%)
  - Gen Xs (15%)
  - baby boomers (4%)
- Better quality product
  - Gen Zs (11%)
  - Millennials (14%)
  - Gen Xs (12%)
  - baby boomers (6%)
- More reliable product availability
  - Gen Zs (7%)
  - Millennials (9%)
  - Gen Xs (15%)
  - Baby boomers (23%)

U.K. Gen Xs are the most likely to switch to a D2C brand because the customer service is better

U.K. Gen Xs (36%) are the most likely to switch to a D2C brand because the customer experience is better compared to U.S. baby boomers (21%), U.K. baby boomers (35%), U.S. Gen Xs (30%), U.K. millennials (19%), U.S. millennials (27%), U.S. Gen Zs (15%) and U.K. Gen Zs (29%).

- Product is cheaper
  - U.S. Gen Zs (42%)
  - U.K. Gen Zs (19%)
  - U.S. millennials (24%)
  - U.K. millennials (33%)
  - U.S. Gen Xs (9%)
  - U.K. Gen Xs (27%)
  - U.S. baby boomers (32%)
  - U.K. baby boomers (25%)
- More personalization
  - U.S. Gen Zs (15%)
  - U.K. Gen Zs (10%)
  - U.S. millennials (5%)
  - U.K. millennials (7%)
  - U.S. Gen Xs (9%)
  - U.K. Gen Xs (27%)
  - U.S. baby boomers (78%)
  - U.K. baby boomers (0%)
- Faster or cheaper shipping options
  - U.S. Gen Zs (19%)
  - U.K. Gen Zs (6%)
  - U.S. millennials (19%)
  - U.K. millennials (21%)
  - U.S. Gen Xs (13%)
  - U.K. Gen Xs (0%)
  - U.S. baby boomers (18%)
  - U.K. baby boomers (0%)
- Better quality product
  - U.S. Gen Zs (4%)
  - U.K. Gen Zs (16%)
  - U.S. millennials (14%)
  - U.K. millennials (14%)
  - U.S. Gen Xs (17%)
  - U.K. Gen Xs (0%)
  - U.S. baby boomers (4%)
  - U.K. baby boomers (10%)
- More reliable product availability
  - U.S. Gen Zs (4%)
  - U.K. Gen Zs (10%)
  - U.S. millennials (11%)
  - U.K. millennials (7%)
  - U.S. Gen Xs (17%)
  - U.K. Gen Xs (9%)
  - U.S. baby boomers (18%)
  - U.K. baby boomers (30%)

3 / Key findings

Impacts of COVID-19

policy and experience changes on CX

Question 1

> Of the following, which industry do you think has been the most innovative in using emerging technology (e.g., augmented reality, AI, chatbots etc.) during COVID-19 to provide positive customer experiences?

Answers	Percent
Travel and hospitality (e.g. airlines, hotels, resorts, etc.)	7.55%
Retail	27.20%
Banking and financial services	16.40%
Insurance	2.60%
Telecommunications (e.g. cable, phone service providers, etc.)	14.80%
I don't know	31.45%

The majority of consumers (27%) think the retail industry has been the most innovative in using emerging technology to provide positive customer experiences (up 12% from pre-COVID-19), compared to banking and financial services (16% - down 11% since pre-COVID-19) telecommunications (15% - down 4% since pre-COVID-19), travel and hospitality (8% - down 6% since pre-COVID-19) and insurance (3% - no change since pre-COVID-19).

U.S. and U.K. consumers think retail industry has been the most innovative with technology for positive CX during the pandemic

More than a quarter of U.S. consumers (27%) and U.K. consumers (28%) think the retail industry has been the most innovative when it comes to using emerging technology to provide positive customer experiences during the pandemic.
For U.S. consumers this is compared to telecommunications (17%), banking and financial services (14%), travel and hospitality (9%), and insurance (3%).
For U.K. consumers this is compared to telecommunications (12%), banking and financial services (19%), travel and hospitality (7%), and insurance (3%).

Men and women agree retail has been the most innovative when it comes to using emerging technology to provide positive CX during the pandemic

More than a quarter of men (28%) and women (27%) think the retail industry has been the most innovative when it comes to using emerging technology to provide positive customer experiences during the pandemic, compared to:

- Travel and Hospitality
  - Men (8%); Women (7%)
- Banking and Financial Services
  - Men (19%); Women (15%)
- Insurance
  - Men (3%); Women (3%)
- Telecommunications
  - Men (15%); Women (15%)

U.K. men are the most likely to think retail industry has been the most innovative when it comes to using emerging technology to provide positive cx during the pandemic

More than a quarter of U.K. men (28%) think the retail industry has been the most innovative when it comes to using emerging technology to provide positive customer experiences during the pandemic, compared to U.K. women (27%), U.S. men (27%) and U.S. women (26%):

> Of the following, which industry do you think has been the most innovative in using emerging technology (e.g., augmented reality, AI, chatbots etc.) during COVID-19 to provide positive customer experiences?

- Travel and Hospitality
  - U.S. men (12%); U.K. men (6%)
  - U.S. women (8%); U.K. women (7%)
- Banking and Financial Services
  - U.S. men (16%); U.K. men (20%)
  - U.S. women (13%); U.K. women (18%)
- Insurance
  - U.S. men (3%); U.K. men (3%)
  - U.S. women (3%); U.K. women (2%)
- Telecommunications
  - U.S. men (14%); U.K. men (15%)
  - U.S. women (18%); U.K. women (8%)

Gen Zs are the most likely to think the retail industry has been the most innovative in using emerging technology to provide positive CX during the pandemic

Nearly a third of Gen Zs (30%) think the retail industry has been the most innovative when it comes to using emerging technology to provide positive customer experiences during the pandemic, compared to millennials (27%), Gen Zs (26%) and baby boomers (26%).

- Travel and Hospitality
  - Gen Zs (12%)
  - Millennials (10%)
  - Gen Xs (5%)
  - Baby boomers (4%)
- Banking and Financial Services
  - Gen Zs (17%)
  - Millennials (19%)
  - Gen Xs (15%)
  - baby boomers (14%)B
- Insurance
  - Gen Zs (5%)
  - Millennials (3%)
  - Gen Xs (2%)
  - Baby boomers (3%)
- Telecommunications
  - Gen Zs (16%)
  - Millennials (16%)
  - Gen Xs (14%)
  - Baby boomers (13%)

U.S. Gen Zs are the most likely to think the travel and hospitality industry has been the most innovative in using emerging technology to provide positive CX

One-in-seven (14%) U.S. Gen Zs think the travel and hospitality industry has been the most innovative in using emerging technology to provide positive CX during the pandemic, compared to U.K. Gen Zs (11%), U.K. millennials (8%), U.S. millennials (13%), U.K. Gen Xs (5%), U.S. Gen Xs (5%), U.K. baby boomers (3%) and U.S. baby boomers (5%).

- Retail
  - U.S. Gen Zs (31%)
  - U.K. Gen Zs (28%)
  - U.S. millennials (25%)
  - U.K. millennials (28%)
  - U.S. Gen Xs (25%)
  - U.K. Gen Xs (26%)
  - U.S. baby boomers (23%)
  - U.K. baby boomers (32%)
- Banking and Financial Services
  - U.S. Gen Zs (15%)
  - U.K. Gen Zs (18%)
  - U.S. millennials (11%)
  - U.K. millennials (25%)
  - U.S. Gen Xs (14%)
  - U.K. Gen Xs (15%)
  - U.S. baby boomers (14%)
  - U.K. baby boomers (15%)
- Insurance
  - U.S. Gen Zs (3%)
  - U.K. Gen Zs (7%)
  - U.S. millennials (4%)
  - U.K. millennials (2%)
  - U.S. Gen Xs (1%)
  - U.K. Gen Xs (3%)
  - U.S. baby boomers (2%)
  - U.K. baby boomers (1%)
- Telecommunications
  - U.S. Gen Zs (16%)
  - U.K. Gen Zs (17%)
  - U.S. millennials (19%)
  - U.K. millennials (14%)
  - U.S. Gen Xs (19%)
  - U.K. Gen Xs (9%)
  - U.S. baby boomers (16%)
  - U.K. baby boomers (9%)

Question 2

> Of the following, which do you think has most improved your customer experience with brands/ companies during the COVID-19 pandemic?

Answers	Percent
Virtual experiences (e.g., video shopping experiences, virtual banking, virtual appointments, etc.)	13.15%
Order online, pick-up curbside (i.e., at grocery stores, retail stores, restaurants, etc.)	48.30%
Membership freezes or discounts (e.g., cable, store or gym memberships, etc.)	12.80%
Corporate social responsibility initiatives (e.g., charity donations with purchase, etc.)	6.35%
I don't know	19.40%

The majority of consumers think that order online, pick-up curbside (48%) has most improved their customer experience with brands/companies during the pandemic, compared to virtual experiences (13%), membership freezes or discounts (13%) or corporate social responsibility initiatives (6%).

U.S. consumers are more likely than U.K. consumers to think order online, pick-up curbside has most improved their customer experience with brands/ companies during the pandemic

U.S. consumers (54%) are more likely to think that order online, pick-up curbside has most improved their customer experience with brands/companies during the pandemic, compared to U.K. consumers (43%).

- Virtual experiences
  - U.S. (13%)
  - U.K. (14%)
- Membership freezes or discounts
  - U.S. (10%)
  - U.K. (16%)
- Corporate social responsibility initiatives
  - U.S. (6%)
  - U.K. (7%)

Men and women agree order online, pick-up curbside has most improved their customer experience with brands/companies during the pandemic

Nearly half of men (48%) and women (49%) think that order online, pick-up curbside has most improved their customer experience with brands/companies during the pandemic.

- Virtual experiences
  - Men (13%); Women (14%)
- Membership freezes or discounts
  - Men (13%); Women (13%)
- Corporate social responsibility initiatives
  - Men (7%); Women (6%)

U.S. men are most likely to think order online, pick-up curbside has most improved their customer experience with brands/companies during the pandemic

> Of the following, which do you think has most improved your customer experience with brands/companies during the COVID-19 pandemic?

More than half of U.S. men (55%) think that order online, pick-up curbside has most improved their customer experience with brands/ companies during the pandemic, compared to U.K. men (45%), U.S. women (53%) and U.K. women (40%).

- Virtual experiences
  - U.S. men (12%); U.K. men (13%)
  - U.S. women (14%); U.K. women (12%)

- Membership freezes or discounts
  - U.S. men (8%); U.K. men (15%)
  - U.S. women (11%); U.K. women (17%)`

- Corporate social responsibility initiatives
  - U.S. men (6%); U.K. men (7%)
  - U.S. women (6%); U.K. women (6%)

Baby boomers are twice as likely as gen Zs or millennials to think corporate social responsibility initiatives improved their customer experience with brands/companies during the pandemic

baby boomers (10%) are nearly twice as likely as Gen Xs (6%), millennials (5%) or Gen Zs (5%) to think that corporate social responsibility initiatives has most improved their customer experience with brands/ companies during the pandemic.

- Virtual experiences
  - Gen Zs (18%)
  - Millennials (17%)
  - Gen Xs (10%)
  - Baby boomers (9%)

- Order online, pick-up curbside
  - Gen Zs (51%)
  - Millennials (51%)
  - Gen Xs (48%)
  - Baby boomers (44%)

- Membership freezes or discounts
  - Gen Zs (13%)
  - Millennials (12%)
  - Gen Xs (14%)
  - Baby boomers (10%)

U.K. Gen Zs are the most likely to think virtual experience most improved their customer experience with brands/companies during the pandemic

U.K. Gen Zs (21%) are the most likely to think that virtual experiences have most improved their customer experience with brands/companies during the pandemic, compared to U.S. Gen Zs (14%), U.K. millennials (17%), U.S. millennials (17%), U.K. Gen Xs (7%), U.S. Gen Xs (13%), U.K. baby boomers (8%) and U.S. baby boomers (10%).

- Order online, pick-up curbside
  - U.S. Gen Zs (60%)
  - U.K. Gen Zs (43%)
  - U.S. millennials (60%)
  - U.K. millennials (45%)
  - U.S. Gen Xs (50%)
  - U.K. Gen Xs (46%)
  - U.S. baby boomers (47%)
  - U.K. baby boomers (37%)

- Membership freezes or discounts
  - U.S. Gen Zs (12%)
  - U.K. Gen Zs (14%)
  - U.S. millennials (6%)
  - U.K. millennials (16%)
  - U.S. Gen Xs (12%)
  - U.K. Gen Xs (15%)
  - U.S. baby boomers (9%)
  - U.K. baby boomers (11%)

Question 3

> **Has your opinion of brands changed because of policies they implemented due to COVID-19 (e.g., longer shipping times, limited hours of operation, etc.) that may negatively impact your experience?**

Answers	Percent
Yes, I view brands more positively for implementing these policies	35.45%
Yes, I view brands more negatively for implementing these policies	8.60%
My opinion of brands has not changed due to implementing these policies	49.40%
I don't know	6.55%

Nearly half of consumers (49%) have not changed their opinion of brands because of policies the brand implemented (e.g., longer shipping times, limited hours of operation, etc.) due to COVID-19 that may negatively impact their experience. More than a third (36%) view brands more positively for implementing these policies, and 9% view brands more negatively for implementing these policies.

U.K. consumers are more likely to view brands more positively for implementing policies due to COVID-19 that may negatively impact their experience

Nearly two-in-five (38%) U.K. consumers view brands more positively for implementing policies due to COVID-19 that may negatively impact their experience, compared to 11% who view brands more negative and 46% who have not changed their opinion of brands for implementing these policies.

One third (33%) of U.S. consumers view brands more positively for implementing policies due to COVID-19 that may negatively impact their experience, compared to 7% who view brands more negative and 53% who have not changed their opinion of brands for implementing these policies.

Women are more likely to view brands more positively for implementing these policies

Women (37%) are more likely than men (34%) to view brands more positively for implementing policies due to COVID-19 that may negatively impact their customer experience.

More than one-in-nine (12%) men view brands more negatively for implementing these policies, compared to 6% of women.

Nearly half of men (49%) and half of women (50%) have not changed their opinion of brands for implementing these policies.

U.K. women are the most likely to view brands more positively for implementing these policies

U.K. women (44%) are the most likely to view brands more positively for implementing policies due to COVID-19 that may negatively impact their customer experience, compared to U.K. men (34%), U.S. women (33%) and U.S. men (35%).

Nearly one-in-seven (13%) U.K. men view brands more negatively for implementing these policies, compared to U.K. women (7%), U.S. women (6%) and U.S. men (7%).

> Has your opinion of brands changed because of policies they implemented due to COVID-19 (e.g., longer shipping times, limited hours of operation, etc.) that may negatively impact your experience?

U.S. women (54%) are the most likely not to have changed their opinion of brands , compared to U.S. men (51%), U.K. women (42%) and U.K. men (48%).

U.K. millennials are the most likely to view brands more positively for implementing these policies

U.K. millennials (47%) are the most likely to view brands more positively for implementing policies that may negatively impact their customer experience, compared to U.S. millennials (35%), U.K. Gen Zs (41%), U.S. Gen Zs (34%), U.K Gen Xs (37%), U.S. Gen Xs (34%), U.K. baby boomers (34%) and U.S. baby boomers (29%)

- View brands more negatively for implementing these policies
  - U.S. Gen Zs (10%)
  - U.K. Gen Zs (13%)
  - U.S. millennials (7%)
  - U.K. millennials (9%)
  - U.S. Gen Xs (7%)
  - U.K. Gen Xs (10%)
  - U.S. baby boomers (6%)
  - U.K. baby boomers (7%)

- Opinion of brands has not changed due to implementing these policies
  - U.S. Gen Zs (49%)
  - U.K. Gen Zs (39%)
  - U.S. millennials (52%)
  - U.K. millennials (38%)
  - U.S. Gen Xs (51%)
  - U.K. Gen Xs (46%)
  - U.S. baby boomers (59%)
  - U.K. baby boomers (55%)

Millennials are the most likely to view brands more positively for implementing these policies

millennials (42%) are the most likely to view brands more positively for implementing policies due to COVID-19 that may negatively impact their customer experience, compared to baby boomers (31%), Gen Xs (36%) and Gen Zs (38%)

- View brands more negatively for implementing these policies
  - Gen Zs (12%)
  - Millennials (8%)
  - Gen Xs (8%)
  - Baby boomers (6%)

- Opinion of brands has not changed due to implementing these policies
  - Gen Zs (44%)
  - Millennials (44%)
  - Gen Xs (48%)
  - Baby boomers (58%)

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