2022 Digital Consumer Trends Index

Global Consumer Attitudes and Trends in Personalization, Privacy, Messaging, Advertising and Brand Loyalty

In conjunction with Econultancy
For generations the path to purchase was relatively linear, something akin to a train track. Marketers simply had to fill the funnel with a few ads and shuffle consumers straight to the brick-and-mortar cash register. Life was good, creative was the difference maker, and sales steadily grew year-over-year. As eCommerce emerged and digital channels evolved, marketers still seemed to control the game as they leaned hard into marketing and advertising technologies that kept them one step ahead of consumer trends.

Then came the global pandemic of 2020, changing the commerce landscape forever. Consumer behaviors that tended to shift over years now shift in a week, or even just a few days. Demand for some product categories skyrocketed, but nothing like the rise in consumer demand for the amount of channels they want to purchase from. The path to purchase today looks more like a bowl of spaghetti, with technologies providing infinite routes to closing the sale. What used to be a simple game of persuasion, which marketers had nearly mastered, has morphed into the age of consumer empowerment where control, choice and convenience rule the day. Marketers need to pivot energies from trying to persuade, to a model that tries more to support a customer. This means being in every possible marketing channel, while delivering value, and critical product information in real-time, as well as understanding the consumer as an individual rather than lumping her into a segment. Like it or not, this is the “new normal” and the way in which we “internet” has been changed forever.

But fear not. As much as how we market and facilitate value to a consumer has changed, some of the core channels and basic tactics are still resonating. For example, email is still the preferred channel for engagement and driving sales when looking at consumers as a whole. But consumers have been vocal about their expectation of marketers when it comes to personalization, across all available channels. As more technology and data becomes available to brands, consumers feel it is no longer acceptable to simply speak to segments or to make suggestions and recommendations based on data derived from third parties. Resolving these issues should not be difficult for marketers today as the tools and data are readily available to do so. But sometimes bad habits are hard to break.

Additionally, loyalty programs continue to be the preeminent way to build profitable and lasting relationships with consumers. They expect comprehensive programs that go beyond points for purchase and will reward brands that are delivering engaging, interactive experiences. Other successful factors include providing exclusive access to new products, truly-personalized product recommendations, public brand recognition and providing an interactive community component. If there is one clear takeaway, it is that even your own customers will buy from your competitor if you do nothing to engender their loyalty. Adopting a comprehensive loyalty program should be a goal in your greater relationship marketing strategy as it feeds both your customer acquisition and customer retention needs simultaneously.
Privacy is also top of mind with people today. Consumers are taking more steps than ever before to protect their privacy online with a significant rise in ad blocking tech installations, continued increase in the clearing of cookies, encrypting passwords and using paid-for internet security software. Consumers are clearly en-masse pretty cognizant about the value of their data and aim to protect it. When contrasted with well established global privacy legislation, the denouement of Apple’s IDFA, and third-party cookie tracking enjoying its final days, modern marketers must now shift to a fully-fledged first- and zero-party data strategy to build direct connections with consumers.

The good news is that the majority of consumers are willing to trade personal and psychographic data if you offer the right value exchange, and especially if you promise to keep that data safe and private. The mechanics of that exchange could be as simple as offering a discount, a reward or a chance to win a prize. But when that transaction is consummated, brands are able to deliver on the expectation of a truly-personalized experience such as better content, offers and product recommendations. More importantly, in this age of consumer empowerment, marketers can now meet the consumer where they are, in any channel, in near real-time, including in-store. The value exchange economy is roaring to life and it’s fueled with first- and zero-party data.

The data you are about to read in this report has the ability to significantly impact your revenue goals in both the short and long term, but it may require a willingness to adopt a new marketing mentality. Relationship marketing requires listening to the right consumer signals intently and activating them in real-time in any channel a consumer prefers. This is an extraordinary opportunity to assess your organization’s ability to execute on that level and deliver against consumers’ growing demand for more personalization, more privacy and a deeper relationship with the brands they know and trust.
When it comes to driving sales, email has always been one of the most effective channels, especially considering its ability for the hyper-personalization of content and offers. In fact, email still beats banner ads, social media ads, organic posts, and SMS by up to 108%, with half of consumers reporting they have purchased a product directly as a result of an email they received in the last 12 months.

As ever, brand loyalty is on the rise, with 57% of consumers prepared to pay more to purchase from a preferred brand. This is backed-up by huge increases in the number of consumers who are loyal to a brand because they understand them as an individual (110% increase), treat their data with respect (71% increase), align with their personal values (58% increase) and admire their loyalty program (55% increase).

Consumers are loyal by nature, but what they expect from the loyalty programs that turn them from one-off customers into loyal brand advocates is maturing. We have seen a stark rise in consumers expecting contests and sweepstakes (73% increase), exclusive access and content (58% increase), personalized product recommendations (56% increase), brand recognition (45% increase) and community (33% increase).

The majority of consumers want to receive personalized content and offers from trusted brands and will readily share personal data for it. However, they prefer brands use data that has been explicitly shared directly to the brand (zero-party data) and they do not feel comfortable with cookie-fueled ads or location tracking — they still see this as a creepy marketing tactic.

As privacy regulations sweep the globe and data breaches continue to dominate news cycles, consumers are more privacy conscious than ever online. We have seen huge rises in the those turning to incognito browsing (50% increase), a PC cleaner (48% increase), password generator (40% increase), ad blocking tech (37% increase), paid for premium software (31% increase) and a password manager (31% increase).
New global research commissioned by Cheetah Digital reveals what consumers expect from the brands they do business with online, the channels they want to connect on and the data they’re prepared to share in return for more personalized experiences at every stage of the customer lifecycle, from acquisition through to loyalty.

It shares insight from 5,404 consumers across seven countries (Australia, France, Japan, Spain, the U.K. and Ireland, and the U.S.) as well as by age group (18-24, 25-39, 40-54, and 55-75), gender and annual household income ($0-$25,000, $25,001-$50,000, $50,001-$75,000, $75,001-$100,000, $100,001-$150,000 and over $150,000) to help digital strategists and decision-makers understand how these issues fit together to build more meaningful and lasting relationships between brand and buyer.

The format for this version of our report focuses mainly on a global view across all demographics. Be sure to visit www.cheetahdigital.com for other report versions that take aim on the differences in attitudes among varying age groups along with a US-only data report (both scheduled for late spring 2022).
Email Is the Number 1 Driver Of Sales... Again

There are numerous touchpoints in which one should be connecting with your customer, but email is still comfortably the preferred channel of consumers for receiving offers, content, incentives, and rewards from brands. Half of consumers (50%) have made a purchase from an email they received in the last 12 months, a 9% uplift on last year.

If you want to get your emails opened, read, clicked and converted, email personalization needs to go beyond a first name in the subject line, or lumping consumers into large cohorts based on tired buyer personas. True email personalization offers products your customer has expressed an interest in, that fit their declared budget, and contain dynamic content that uses keywords that you know will elicit engagement from them — derived from preference insights and purchase motivations that they have explicitly told you. This zero-party data will empower you to deliver hyper-personalized, data-driven email, and maximize ROI from it.

Using zero-party data, you can truly personalize every single touchpoint across owned channels to enhance the customer’s journeys with your brand. This is the path in 2022 to increased revenue and customer retention.
Purchase Persuasion Factors

Consumers are influenced by a multitude of factors when making purchases. Brands need to prioritize their value proposition to be front-and-center when a customer is ready to purchase. 41% of consumers still hunt for the best price when it comes to buying, but others value convenience (17%), fitting their style (26%), and expecting brands to behave responsibly (16%).

Online it’s sometimes easy to forget that visitor #4532 is a real, live person with completely unique wants and needs that can’t be thrown into a large cohort purely based on something they once bought.

Many initiatives by marketers that purport to be personalization rarely meet the definition, which is “producing something to meet someone’s individual requirements”. Personalization is not achieved through segmentation, cohorts or lookalike audiences. Marketers are commonly serving up remedial efforts such as retargeting ads, using simply a customer’s first name or employing a curation algorithm that delivers the all-too-familiar: “people who bought item X also bought item Y.” These efforts fail to yield the ROI, engagement and long term excitement from consumers that true, next-gen personalization investments net.

Consumers are craving more individualization from brands and rewarding those that have made that commitment.
Real-time engagement is the prerequisite expectation of digitally-savvy consumers who have long demanded next-day shipping, live-tracking of their brunch order, and choosing potential dating partners at the swipe of a finger.

Consumers interact with a brand on multiple channels, oftentimes unpredictably. The way to engage with these consumers is through real-time, hyper-personalized experiences. To cut the buzzwords, that’s providing the right offer, on the right channel, at the right time. More than half of consumers (52%) declared they use a mobile phone while in a store to research or help them decide to make a purchase, and a hefty 47% claim to have browsed for products in a physical store but purchased online. It’s clear that if you are not listening to these multiple touchpoints across various channels, or if you can’t activate that data and provide a relevant and real-time reaction on mobile, your customers will be purchasing elsewhere.

In today’s digital and interconnected world, your relationship marketing strategy has to have mobile-first capabilities, rather than merely being mobile-responsive. This cannot be overstated.

Consumers interact with an average of six digital touchpoints when engaging with a brand — whether that’s via social media, payment through digital wallet, offers from SMS or email, just to name a few — but all these touchpoints can be directly accessed by consumers through mobile. Mobile is no longer a nice-to-have, it’s a must-have.
Mobile is no longer a nice-to-have, it's a must-have.

52% of consumers have purchased a product or service in-app

52% of consumers have used a mobile phone while in a store to research or help decide to make a purchase

47% have browsed for products in a physical store but purchased online

19% year-on-year increase in consumers who have bought something because of an email they viewed on their mobile phone
How Best-in-Class Brands are Nurturing Profitable Relationships

The overwhelming majority of consumers, when thinking about how their favorite brand communicates with them, want the relationship to go beyond the purely transactional.

Above all else, a staggering 80% of consumers like consistent shopping experiences, irrespective of the channel. That means marketers need the ability to both listen and react in all channels. More importantly, all of that data must flow in and out of a single source of truth. Simply put, there is a need for a unified customer profile which includes identifying core information about the customer, the channels and interactions they’ve had with your organization along with their transaction history, be it revenue, an event, or simply visiting your website, for example.

78% of consumers have a favorite brand as it rewards them for their loyalty, and almost 3/4 of consumers like brands to use their data responsibly and treat them as an individual. Where privacy was once an afterthought for most brands, it’s now seen as vital a differentiator as price, product, and customer experience.
80% of consumers have a favorite brand as it provides a consistent customer experience

78% of consumers have a favorite brand as it rewards them for their loyalty

74% of consumers have a favorite brand as it uses their data in a way that makes them feel comfortable

74% of consumers have a favorite brand as it treats them like an individual

71% of consumers have a favorite brand as it strives to develop a relationship

64% of consumers have a favorite brand as it surprises them with rewards they don’t expect

58% of consumers have a favorite brand as it treats them like a VIP
How Favored Brands Communicate with Their Customers

Your communication frequency should be based on your typical customer’s purchase cycle and profile. If customers typically make repeat purchases every six months, don’t inundate them with targeted emails or advertising right after they’ve made a purchase. More than half of consumers (51%) describe the relationship with their favorite brand as they communicate as and when necessary — a sweet spot you learn through progressively getting to know your customer.

Progressive profiling allows you to ask the next-best question to expand your knowledge on an individual. New data gives you new reasons to reach out with a more relevant message or offer. 23% of consumers describe the relationship with their favorite brand as one that understands them. Most forward-thinking brands are progressively profiling customers’ interests, preferences, motivations and desires just as two people would do in a conversation. With zero-party data, audience building and progressive profiling never stops, it just evolves. Let the data tell you when they have a need or you have a relevant message to send. The days of marketers casting and blasting one single message to their entire database are behind us. Know your audience and let AI or machine learning help determine who gets that next message and when.

51% of consumers describe the relationship with their favorite brand as they communicate as and when necessary

23% of consumers describe the relationship with their favorite brand as they understand them
Personalization Initiatives are Falling Short

Most marketers kind of suck at personalization. That might sound like clickbait, but in the data economy, where brands and retailers have huge portfolios of data on their customers, personalization is more often a marketing department buzzword than a genuine tactic.

Consumers are frustrated with the lack of personalized messaging they are receiving, with half of them feeling irked by irrelevant content or offers (49%), receiving messages that don’t reflect their wants and needs (41%), and almost a third do not feel a brand has even recognized their shopping or loyalty history (31%).

35% of consumers felt frustration when they received messaging based on what seemed to be information about them that hadn’t been shared directly with the brand. Personalization is the core of relationship marketing. That means it’s about delivering value, relevancy and creating meaningful experiences to individuals based on their own preferences and data, not third-party or inferred data that may have possibly been bought or collected by tracking and snooping.

Your personalization and messaging strategy needs to be rooted in both first- and zero-party data. Creating messaging opportunities based on transactional data is great, but using zero-party and psychographic data to personalize those messages will differentiate your brand from your competitors.

- 49% of consumers felt frustration when they received irrelevant content or offers
- 41% of consumers felt frustration from messaging that doesn’t reflect their wants and needs
- 35% of consumers felt frustration when they received messaging based on information that they hadn’t shared directly with the brand
- 31% of consumers felt frustration when they received messaging that didn’t recognize their shopping or loyalty history
Personalization that Misses the Mark is Becoming All-Too-Familiar

Year-on-year rises in consumer frustrations at the personalization they receive from brands.

- 52% rise in frustration at messaging that doesn’t reflect their wants and needs
- 20% rise in frustration at communications delivered at the wrong time of day
- 17% rise in frustration at messaging containing irrelevant content & offers
- 17% rise in frustration at messaging based on data the consumer hasn’t shared directly with the brand
- 11% rise in frustration at messaging that doesn’t recognize loyalty history

Personalization that Misses the Mark is Becoming All-Too-Familiar
Consumers are Happy with the Amount of Messaging They Receive from Brands

Whether through email, apps, social media or SMS, consumers are generally pretty content with the volume of messages they receive from brands.

When it comes to being “about right” or “would like to receive more messaging,” the numbers are positive. Consumers feel they get the perfect amount of or would readily receive more messaging about discounts (70%), brand value (65%), loyalty programs (71%), VIP offers (68%), treats (73%), free delivery offers (72%), and sales (55%).

When it comes to feeling “overwhelmed” by messaging, the numbers are again encouraging, discounts (11%), brand values (12%), loyalty programs (11%), VIP offers (12%), treats (10%), free delivery offers (10%), and sales (16%).

Those brands that win master the craft of connecting with their customer on the right channel, with the right message, at the right time.
Customer-obsessed businesses expect to be 7X more relevant to customers and 4X more profitable
Loyalty Drivers

Once merely the darling of supermarkets and airlines, loyalty programs are omnipresent in every vertical. There are many factors that drive brand loyalty, and the top drivers are fairly simple, have a great product or service (55%) and good customer service (38%). Following on from that, over a third of consumers value a brand’s loyalty program (34%), similar for the brand being convenient to use (31%). Investments in improving these areas will ensure a long-term return and differentiate you from your competitors.

Then it becomes a little more interesting. 39% of consumers are electing to stick with brands that they feel it’s safe to buy from — this rise in conscientious consumerism, with your customers proactively educating themselves on your brand’s corporate, ethical, and environmental values is a burgeoning loyalty driver that feels here to stay.

What’s more, 24% of consumers are loyal to brands that are responsible with their data, with modern consumers more up-to-date with privacy legislation and the responsibilities of the brands they do business with.

///
Highly-Profitable Customers are Being Handed to Your Competitors

Consumers tend to be people of habit, and many enjoy the benefits that come from being loyal to a brand. The most unambiguous way a customer can show they trust your brand is to pick you over the competition, have affinity for your products, and believe in your brand promises, as well as being prepared to pay a little bit extra for it — 57% of consumers identify this way.

However the real story here is that over two-thirds of consumers say there are examples where they frequently buy from the same company, but don’t feel loyal to that company, and 78% say they are loyal to a particular brand, but will look elsewhere if it’s cheaper or more convenient.

Old patterns of consumer behavior no longer hold true in the current marketplace, and brands need to adjust to survive. Loyalty programs can be that all-important arrow in the CMOs quiver.

- 57% of consumers are prepared to pay more to purchase from a trusted brand
- 67% of consumers buy frequently from the same company, but are not loyal to that brand
- 29% of consumers are not loyal to any particular brands
Turning Frequent Shoppers into Loyal Brand Advocates

The core of loyalty is not merely the cheapest price point, but a brand that creates emotive bonds, fosters community, recognizes the customer as an individual, and delivers content, bespoke offers, and product recommendations that reflect this.

Marketing departments are perpetually working to envision new and interesting ways to keep their customers engaged, retained, and loyal in a world full of infinite choices. In this era of the digitally savvy consumer, traditional loyalty program models are becoming outdated — too transactional, too stale, and not effective in significantly changing consumers’ perception or behavior.

With over two-thirds of consumers declaring they buy frequently from the same company, but don’t feel loyal to that company, we asked what could turn these regular buyers into loyal brand advocates?

Brands that provide extra value for the customer to stay loyal (40%), feeling safe to buy from (24%), understanding the customer as an individual (23%), and treating data with respect (17%), were the key drivers.

- 67% year-on-year increase in consumers who would feel closer to a brand if they provide extra value for them to stay loyal
- 24% of consumers would feel closer to certain brands if they feel safe to buy from
- 23% of consumers would feel closer to certain brands if they feel they understand what they need better
- 17% of consumers would feel closer to certain brands if they treat their data with respect
The Cost of Getting Loyalty Wrong

Emotional and genuine loyalty is an outcome — a goal you can only achieve by truly knowing your customers and carefully nurturing every relationship you have — every action, input, and communication a customer receives should make them feel valued and respected.

However, all too many brands still invest far more resources in customer acquisition strategies, rather than customer retention. Rather than accrue new customers in the immediacy, there should be a focus on maintaining relationships with one’s current customer base with trust becoming as much a differentiator as price and product.

Almost a third of consumers have switched away from a brand they previously liked to buy from, with many citing a competitor having better promotions (31%), or buying options (26%), because they didn’t feel valued as a customer (21%), or because of its stance on social, political, or environmental issues (19%).
Loyalty is On The Rise

Loyalty programs drive sales and increase customer lifetime value — and keep profitable customers coming back — and the good news is that consumers love them and the vast majority are willing to increase their participation.

Consumers are participating in loyalty programs, even if you are not offering one. Only 8% of consumers are less likely to participate in a loyalty program than last year — a staggering 38% decrease on last year. Your customers aren’t just ready for a loyalty offering, they expect it. One that truly rewards them as an individual and goes beyond a freebie every tenth purchase or a raft of points that will never be redeemed.

Most consumers tend to already be members of existing loyalty programs (92%) and there’s been an 11% year-on-year increase on those that are willing to increase their participation.

- 40% of consumers more likely to take part in a loyalty program than last year
- 38% year-on-year decrease in consumers who are less likely to take part in a loyalty program than last year
- 11% year-on-year increase in consumers who are more likely to take part in a loyalty program than last year
A Loyalty Program is Not a Rewards Program

A lot of brands think they need a points-based rewards program, because all-too-many conflate the term loyalty program with rewards program. Points to win prizes is merely one of the many different tactics one can use to help engender loyalty.

The modern consumer still values a discount for their loyalty (64%), or points to keep them coming back (59%), but the real story is the rise in consumers valuing all of the things that make your brand unique, and, in turn, makes them feel special.

There have been huge year-on-year increases in consumers who love engaging interactive experiences like contests and sweepstakes (73%), those seeking early or exclusive access to products (58%), personalized product recommendations based on their self-reported preferences (56%), those that would like brand recognition (45%), and consumers who want to feel part of the brand’s community (33%).

The results make it clear that consumers expect comprehensive loyalty programs that go beyond the generic. The heart of loyalty is not merely the cheapest price-point, but a brand that can foster community, recognizes the customer as an individual, and delivers content and product recommendations that reflect this.
73% year-on-year increase in consumers who want contests and sweepstakes in return for their loyalty

58% year-on-year increase in consumers who are loyal for exclusive or early access to products, events, and services

56% year-on-year increase in consumers who want suggested products and services based on their preferences for their loyalty

45% year-on-year increase in consumers who want brand recognition for their loyalty

33% year-on-year increase in consumers who want to be part of a brand’s community for their loyalty
Creepy Marketing Needs to be Left in 2021

Like the pandemic, tankers getting stuck in the Suez Canal, and Tiger King, forms of creepy marketing need to be left in 2021. What marketers view as exciting innovations in data gathering to drive personalization initiatives, are actually viewed as rather surreptitious by consumers. Just because marketers have access to certain data (for now), doesn’t mean they should collect it or use it.

The overwhelming majority of consumers feel adverts derived from location data, cookie tracking, and listening smart devices are creepy, not cool, and they’re split on the use of chatbots accessing purchase history and ads on social media based on recent shopping experiences — so tread carefully with these.
The Value Exchange Economy

If you want your customers’ preference data you need to offer something tangible in return — this is the value exchange economy. It is possible for marketers to collect this golden data, but alas it’s not a case of simply “ask and ye shall receive.” More than ever, modern consumers expect to be entertained, engaged, and receive something in return for their attention and personal data.

But it needn’t always be a red-letter prize or huge discount. Sure, 93% of consumers are prepared to trade data for a discount, 92% for loyalty points, and 84% for the chance to win a prize. But consumers are actually sharing behavioral and psychographic data for exclusive access (86%), unlocking content (61%), and to feel part of a brand’s community (55%).

- 92% of consumers will trade personal and preference data for loyalty points.
- 55% of consumers will trade personal and preference data to feel part of a brand’s community.
- 86% of consumers will trade personal and preference data for early or exclusive access.
Building Mutually Beneficial Relationships

Year-on-year increases in consumers who are willing to trade their preference data for a raft of value exchanges.

- 27% rise in consumers who will share preference data for exclusive access
- 19% rise in consumers who will share preference data to feel part of a brand’s community
- 18% rise in consumers who will share preference data for the chance to win a prize
- 17% rise in consumers who will share preference data in return for unlocking content
- 17% rise in consumers who will share preference data in return for loyalty points
- 11% rise in consumers who will share preference data in return for a discount

Year-on-year increases in consumers who are willing to trade their preference data for a raft of value exchanges.
Consumer’s Will Share Their Preference Data for Better Service

The majority of consumers are comfortable sharing data about themselves like clothing size, age and family make-up for a better service (55%), but most are not happy to share a photograph (78%), their location (59%), or identity details (58%). The key is only asking for information that truly empowers you to build more meaningful relationships with your customer and deliver on the promise of a more-personalized service.

Brands can deliver this through interactive experiences that conduct research, accrue opt-ins, and deliver an altogether better experience with a value exchange for the consumer.

Questionnaires, polls, quizzes, contests or social stories can incorporate reward mechanics that give consumers a genuine reason to engage and submit their first- and zero-party data.

Capturing consumer motivations, intentions, interests, and preferences at scale allows for a personalized customer experience. And by leveraging the right mechanics, and offering a value exchange, your customers will tell you what products they desire, what they look for in a service, and what motivates them to purchase.
“Zero-party data is that which a customer intentionally and proactively shares with a brand. It can include preference center data, purchase intentions, personal context, and how the individual wants the brand to recognize them.”

- Forrester
Consumers are More Privacy Conscious Than Ever, and They’re Getting Proactive about it

We’re a good few years on from the Cambridge Analytica scandal and many of us marketers might have become headline-blind to the constant stories of privacy breaches, surreptitious data gathering by big tech companies and burgeoning privacy legislation, and the eye-watering fans that come with it. But consumers have not, and they’re ever-more cognizant of the value of their data, and are taking proactive steps to protect it.

More than half of consumers are using a PC cleaner (56%), and well over a third have turned to ad blocking tech (38%), and password managers (37%). What’s startling however is that there are huge year-on-year uplifts in consumers personally using an incognito browser (50%), PC cleaner (48%), password generator (40%), ad blocker (37%), paid for premium software (32%) and password manager (31%).

The solution is to not find ways to circumvent this trend but commit to forging honest, meaningful relationships, and adopting a fully-fledged privacy-first strategy.
Privacy Tech Adoption is on the Rise

Year-on-year rises in consumers taking control of their data.

- 31% year-on-year increase in consumers using a password manager
- 32% year-on-year increase in consumers using paid-for premium software
- 37% year-on-year increase in consumers using an ad blocker
- 40% year-on-year increase in consumers using a password generator
- 48% year-on-year increase in consumers using a PC cleaner
- 50% year-on-year increase in consumers using an incognito browser
The Death of the Cookie

As Google cements plans to comprehensively curtail third-party cookie tracking within the next couple of years, and Firefox, Safari et al., scramble to follow suit, the way in which marketers connect with consumers is undergoing radical change.

Since those early days of dial-up, when Amazon was merely a bookseller and searches were made by “asking Jeeves” — cookies have been the norm for following users around the internet, and reporting back activity and information to marketers and data vendors. For three decades this has been the de facto way for marketers to marginally personalize their campaigns to consumers.

Although these behemoth browsers’ privacy pivot is a win for privacy-conscious consumers, with 62% thinking retargeting ads derived from cookie tracking are creepy. Only 31% are glad they’re being withdrawn, and the vast majority of consumers are blissfully unaware cookies are being phased-out (72%) in the first place.

Ultimately it’s a headache for marketers wedded to third-party cookies to power their advertising, as well as perpetuating Google’s anti-competitive walled garden. These sweeping changes to the martech and adtech industries reinforce the need for marketers to shift to a first- and zero-party data strategy to power their advertising and marketing initiatives. The cookie is truly crumbling.

13%
Only 13% of consumers will miss cookies and think they make for a better online experience

37%
Just over a third of consumers are optimistic brands will come up with a way of sharing data that is fairer for everyone

72%
The vast majority of consumers are unaware that cookies are being withdrawn soon
Consumers Trust Brands with Their Data More than Ever Before

Crisis can be a catalyst for change, and for almost all verticals the COVID-19 pandemic has accelerated the way in which brands provide a digital service and innovated how they deliver their products.

For many, it's been an opportunity to build deeper, more meaningful relationships with customers, learn more about them, and use that data to provide personalized marketing and services. Consumers tell us they love brands who are responsible with their data, with nearly a quarter citing they are loyal to certain brands because they trust them to treat their data with respect.

While the COVID-19 pandemic has been unequivocally a disaster for communities and brands, we have seen a rise in consumer trust — and this is a trend we should all strive to continue.
Trust in Every Industry is on the Rise

Year-on-year increases in trust in the following industries to use data to provide personalized marketing and services.

- Restaurant: 8%
- Beauty & Fashion: 9%
- Travel & Hospitality: 9%
- Furniture & Household Goods: 11%
- Food & Grocery Shopping: 11%
- Sports & Entertainment: 13%
- Household Appliances: 14%
- Financial Services & Banking: 16%
- Household Appliances: 16%
- Gaming & Gambling: 24%
When the Trust is Gone, it Might be Time to Break-up (with Social Media)

Social channels were not built for marketers. The vast majority of consumers use it as a digital space to engage with their peers, and brand interaction is often to sound-off about poor service. If you were at a party you wouldn’t want an overzealous salesperson following you round while you tried to chat to friends.

Social media advertising is already a vertical hallmarked by a lack of transparency, performance fraud, ad blocking, and spamming ad frequency that has resulted in the abject engagement rates and lack of trust we see today. More importantly it’s traditionally perpetuated by formats that are no longer fit for purpose — chasing views, clicks, and other vanity metrics instead of what really matters, engagement.

For consumers the deep mistrust of social media comes after a difficult spell for the sector in which Facebook et al., have been accused of eroding privacy, harming children and undercutting democracy. The Cambridge Analytica scandal highlighted big tech’s ability and willingness to harvest data and subvert democracy, while there have been countless examples of online radicalization and misinformation throughout the pandemic on everything to vaccines and the virus itself.

58% of consumers do not trust social media platforms with their data

Only 27% of consumers trust social media platforms to use their data responsibly moving forward
The future of marketing to individuals with relevance is about asking them about their interests, motivations and desires, rather than inferring or snooping on them. With a zero-party data strategy, brands can connect directly to consumers and gather the data that the social media “Walled Gardens” so jealously guard.

Marketers can start reconnecting with modern consumers by switching from interruptions to experiences. Instead of erroneously spending money on pushing their message wider and further, they can shift to a strategy rooted in offering value for engagement, and begin to unlock customer relationships directly.

What's more, the data backs up that consumers just don't trust social media platforms any more. 69% are sharing less data, over a third are deleting their accounts (37%), and well over half are actively engaging less for their mental health (57%). The vast majority of consumers believe social media platforms don't do enough to delete harmful account (74%), and is guilty of fueling political polarization (66%).
66% of consumers are concerned by the polarization of political opinion on social media platforms.

74% of consumers believe social media platforms don’t do enough to delete harmful content.

57% of consumers are actively engaging less with social media platforms for sake of their mental health.

69% of consumers are sharing less data with social media platforms because it’s too hard to track how it’s being used.

63% of consumers feel manipulated by algorithm rules which control what content they see.

37% of consumers have closed or stopped using an account in last year because they have been upset by posts they have seen.

64% of consumers do not trust the advertising they see on social media platforms.

73% of consumers see a lot content these days which doesn’t interest them.
Brick-and-mortar stores might be back open for business, but the shift online forced by the COVID-19 pandemic has not abated. Digital natives have been joined online by consumers who traditionally choose bricks over clicks, and every vertical has seen a sizeable increase in consumers making purchases from the comfort of their home or on their smartphone.

Like it or not, for now, the pandemic has changed the way we “internet” and much of this shift appears to be permanent. The adoption of digital technologies has advanced by several years and marketers that once mapped digital strategy in one to three year phases are scaling their initiatives in a matter of days or weeks.

To win and maintain relationships with today’s tech-savvy consumers, marketers need to connect with them on the right channel, at the right time. It’s imperative that brands match the customer service expectations that they would enjoy in-store, online and find new and innovative ways to add value to their customer’s lives to keep them loyal.
Ecommerce Continues to Rise

Year-on-year increases in industries consumers have made an online purchase from.
Brands are Providing a Better Online Customer Experience

Price will probably always be king, but a good online customer experience is queen. Consumers are influenced by a number of factors when making purchases, with price of course always being a determining factor. However, a staggering 80% of consumers have a favorite brand as it provides a consistent customer experience.

The idea of a true omnichannel experience, where brands seamlessly blend the physical with the digital, can seem deceptively easy to achieve. Catering to individual customers’ preferences and actively steering them toward the most efficient resolution is tough, but brands are getting there. And customers want it too, expecting consistent information merely a click away irrespective of the touchpoint they are choosing to engage with.

Delivering a better online customer experience is about putting the customer at the heart of everything, where all channels and touchpoints revolve around them, not merely the product — that means breaking down barriers, both organizationally and within your tech stack, to create a unified commerce approach.
Online Customer Experience is Trending Up

Year-on-year increases in consumers declaring specific industries provide the best online customer experience.

- Household Appliances: 133%
- Furniture & Household Goods: 100%
- Home Improvement, Garden & Pets: 100%
- Financial Services & Banking: 83%
- Travel & Hospitality: 70%
- Gaming & Gambling: 60%
- Restaurant: 50%
- Beauty & Fashion: 38%
- Sports & Entertainment: 38%
- Food & Grocery Shopping: 25%
It’s time to look beyond transactional data to build thriving customer relationships at every touchpoint. With Cheetah Digital’s Customer Engagement Suite, you have an entire platform at your fingertips to build the most relevant, integrated, and profitable customer experiences.

Cheetah Digital

Start building lasting customer relationships at cheetahdigital.com
Appendix
Have you ever made a purchase from any of the following in the last 12 months?

**Austria**
- An email: 11%
- A post in social media: 17%
- An advertisement in social media: 15%
- A banner ad on a website or app: 8%
- SMS/NMS message: 9%

**France**
- An email: 41%
- A post in social media: 29%
- An advertisement in social media: 22%
- A banner ad on a website or app: 4%
- SMS/NMS message: 4%

**Japan**
- An email: 38%
- A post in social media: 25%
- An advertisement in social media: 28%
- A banner ad on a website or app: 5%
- SMS/NMS message: 3%

**Spain**
- A post in social media: 47%
- An advertisement in social media: 45%
- An email: 28%
- A banner ad on a website or app: 3%
- SMS/NMS message: 4%

**UK**
- An email: 44%
- A post in social media: 38%
- An advertisement in social media: 34%
- A banner ad on a website or app: 9%
- SMS/NMS message: 3%

**US**
- An email: 39%
- A post in social media: 25%
- An advertisement in social media: 28%
- A banner ad on a website or app: 6%
- SMS/NMS message: 6%

**Global summary**
- An email: 14%
- A post in social media: 37%
- An advertisement in social media: 33%
- A banner ad on a website or app: 9%
- SMS/NMS message: 8%
If you had to pick one phrase to describe you as a shopper, which would it be?
Which of the following, if any, describe you? (2-2)
Thinking about your favourite brand that has communicated with you a lot over the last six months, please select whether you agree with the following statements. (Agree only) (1-2)
Thinking about your favourite brand that has communicated with you a lot over the last six months, please select whether you agree with the following statements. (Agree only) (2-2)
Thinking of how your FAVORITE brands communicate with you across channels such as email, sms, websites, apps or in-store, which best describes the relationship?

Australia
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 68% (55-81)
- We communicate with each other like we have a good relationship and they understand me: 58% (45-71)
- They trust me like I am a VIP: 39% (26-52)
- I don’t hear from them unless I get in touch because I have a problem or need information: 16% (4-29)

France
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 58% (45-71)
- We communicate with each other like we have a good relationship and they understand me: 53% (40-66)
- They treat me like I am a VIP: 71% (58-84)
- I don’t hear from them unless I get in touch because I have a problem or need information: 21% (9-34)

Japan
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 66% (53-80)
- We communicate with each other like we have a good relationship and they understand me: 62% (49-75)
- They treat me like I am a VIP: 39% (26-52)
- I don’t hear from them unless I get in touch because I have a problem or need information: 12% (2-25)

Spain
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 68% (55-81)
- We communicate with each other like we have a good relationship and they understand me: 58% (45-71)
- They treat me like I am a VIP: 39% (26-52)
- I don’t hear from them unless I get in touch because I have a problem or need information: 16% (4-29)

UK
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 66% (53-80)
- We communicate with each other like we have a good relationship and they understand me: 52% (39-65)
- They trust me like I am a VIP: 71% (58-84)
- I don’t hear from them unless I get in touch because I have a problem or need information: 16% (4-29)

US
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 58% (45-71)
- We communicate with each other like we have a good relationship and they understand me: 53% (40-66)
- They treat me like I am a VIP: 71% (58-84)
- I don’t hear from them unless I get in touch because I have a problem or need information: 21% (9-34)

Global summary
- They communicate as and when necessary, e.g. to tell me about offers or update me on transactions: 66% (53-80)
- We communicate with each other like we have a good relationship and they understand me: 62% (49-75)
- They treat me like I am a VIP: 39% (26-52)
- I don’t hear from them unless I get in touch because I have a problem or need information: 12% (2-25)
Thinking about all the brands that have communicated with you regularly in the last six months, have you experienced any of the following frustrations?

**Australia**
- Ineffective content or offers: 44%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 29%
- Messaging based on information about me that I haven’t shared directly with the brand: 56%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 33%
- Communications delivered at the wrong time of day: 26%

**France**
- Ineffective content or offers: 51%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 41%
- Messaging based on information about me that I haven’t shared directly with the brand: 43%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 28%
- Communications delivered at the wrong time of day: 26%

**Japan**
- Ineffective content or offers: 39%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 35%
- Messaging based on information about me that I haven’t shared directly with the brand: 44%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 26%
- Communications delivered at the wrong time of day: 21%

**Spain**
- Ineffective content or offers: 32%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 48%
- Messaging based on information about me that I haven’t shared directly with the brand: 39%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 26%
- Communications delivered at the wrong time of day: 27%

**UK**
- Ineffective content or offers: 50%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 48%
- Messaging based on information about me that I haven’t shared directly with the brand: 46%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 30%
- Communications delivered at the wrong time of day: 28%

**US**
- Ineffective content or offers: 39%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 44%
- Messaging based on information about me that I haven’t shared directly with the brand: 42%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 30%
- Communications delivered at the wrong time of day: 26%

**Global summary**
- Ineffective content or offers: 46%
- Message that doesn’t reflect my wants and needs (e.g., suggestions based on a previous purchase made for an older relative): 49%
- Messaging based on information about me that I haven’t shared directly with the brand: 42%
- Messages that didn’t recognize my shopping or brand purchase history (e.g., suggesting products I already bought): 34%
- Communications delivered at the wrong time of day: 29%
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)...
Do you see too many or too few messages about... (1-7)
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)...
Do you see too many or too few messages about... (2-7)
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)… Do you see too many or too few messages about… (3-7)
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)… Do you see too many or too few messages about… (4-7)
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)... Do you see too many or too few messages about... (5-7)

UK
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)... Do you see too many or too few messages about... (6-7)
Thinking about the messages you get from brands you engage with (whether through email, apps or social media)...
Do you see too many or too few messages about... (7-7)

Global Summary
Brands want to have loyal customers who prefer them to competitors. Thinking about how you've shopped and your personal brand loyalties in the last six months, are the following statements true? (True only)
Thinking about the brands you are most loyal to, what are the top THREE things that make you loyal to certain brands? (1-2)
Thinking about the brands you are most loyal to, what are the top THREE things that make you loyal to certain brands? (2-2)

UK
- They have great products/services: 60%
- They're very convenient to use: 54%
- They have great customer service and support: 51%
- They have great customer service and support: 51%
- They have great customer service and support: 51%
- I have a loyalty program, and they provide extra value to me to stay loyal: 54%
- The brand aligns with my personal values and beliefs, e.g., environmental or political issues: 25%
- I trust them to treat my data with respect: 25%
- They seem to understand what I need: 25%
- They work hard to build a relationship with me: 15%

US
- They have great products/services: 63%
- They have great customer service and support: 40%
- They're very convenient to use: 33%
- They have great customer service and support: 33%
- They have great customer service and support: 33%
- I have a loyalty program, and they provide extra value to me to stay loyal: 38%
- The brand aligns with my personal values and beliefs, e.g., environmental or political issues: 22%
- I trust them to treat my data with respect: 22%
- They seem to understand what I need: 22%
- They work hard to build a relationship with me: 18%

Global summary
- They have great products/services: 58%
- They're very convenient to use: 30%
- They have great customer service and support: 30%
- They have great customer service and support: 30%
- They have great customer service and support: 30%
- I have a loyalty program, and they provide extra value to me to stay loyal: 25%
- The brand aligns with my personal values and beliefs, e.g., environmental or political issues: 22%
- I trust them to treat my data with respect: 22%
- They seem to understand what I need: 22%
- They work hard to build a relationship with me: 18%
You said you sometimes "Buy frequently from the same company, but don't feel loyal to that company." What would make you feel closer to that brand? (1-2)

<table>
<thead>
<tr>
<th>Australia</th>
<th>France</th>
<th>Japan</th>
<th>Spain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide extra value to me to stay loyal, a better loyalty programme</td>
<td>65%</td>
<td>48%</td>
<td>55%</td>
</tr>
<tr>
<td>Better products/services</td>
<td>36%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Better customer service and support</td>
<td>28%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>More convenient to use</td>
<td>28%</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Understand what I need better</td>
<td>28%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>More convenient to use</td>
<td>4%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Align with my personal values and beliefs e.g. on environmental or political issues</td>
<td>15%</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>Work harder to build a relationship with me</td>
<td>12%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Feed safer to buy from</td>
<td>16%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Trust my data with more respect</td>
<td>11%</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Work harder to build a relationship with me</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Note: The percentages represent the percentage of respondents who selected each option.
You said you sometimes “Buy frequently from the same company, but don’t feel loyal to that company.” What would make you feel closer to that brand? (2-2)
In the past year, have you switched away from or become less loyal to any brand you previously liked to buy from?

Australia

France

Japan

Spain

UK

US

Global summary
You said you have switched away or become less loyal to a brand you previously liked. What were the reasons for this decision? (1-2)
You said you have switched away or become less loyal to a brand you previously liked. What were the reasons for this decision? (2-2)

**UK**
- Other brands are cheaper: 23%
- I don't feel valued as a customer: 26%
- Lack of choice/variety: 33%
- Issues with quality: 28%
- Other brands have better buying options (e.g., group buying, click and collect, home delivery): 25%
- Customer service/support issues: 27%
- Lack of availability: 21%
- Other brands have better offers/promotions: 17%
- Brand's stance on social/political/environmental issues: 26%
- Other (please specify): 0%

**US**
- Issues with quality: 30%
- Customer service/support issues: 29%
- Other brands are cheaper: 26%
- Brand's stance on social/political/environmental issues: 33%
- Other brands have better buying options (e.g., group buying, click and collect, home delivery): 25%
- Customer service/support issues: 27%
- Lack of availability: 20%
- Other brands have better offers/promotions: 16%
- Lack of choice/range: 28%
- Lack of local support: 17%
- I don't feel valued as a customer: 24%
- Other (please specify): 0%

**Global summary**
- Other brands are cheaper: 22%
- Other brands have better offers/promotions: 24%
- Issues with quality: 25%
- Other brands have better buying options (e.g., group buying, click and collect, home delivery): 28%
- Lack of choice/range: 21%
- Lack of availability: 24%
- Customer service/support issues: 20%
- Other brands have better offers/promotions: 24%
- I don't feel valued as a customer: 22%
- Brand's stance on social/political/environmental issues: 25%
- Other (please specify): 2%
Are you more or less likely to engage in brand loyalty programs this year than last year?
Thinking about rewards and loyalty programs, what should brands offer to keep you coming back? (1-2)
Thinking about rewards and loyalty programs, what should brands offer to keep you coming back? (2-2)
How would you feel if a brand/retailer interacted with you in the following ways, please indicate whether you feel it’s creepy or cool? (Cool only) (1-2)
How would you feel if a brand/retailer interacted with you in the following ways, please indicate whether you feel it’s creepy or cool? (Cool only) (2-2)
Brands often provide something of value in exchange for personal data. Which types of benefits are the most valuable to you? (highly valuable only) (1-2)
Brands often provide something of value in exchange for personal data. Which types of benefits are the most valuable to you? (highly valuable only) (2-2)
Are you comfortable sharing the following personal data with brands in exchange for better service or value? (Yes only)
Do you personally use the following on either your mobile, tablet or desktop PC? (1-2)
Do you personally use the following on either your mobile, tablet or desktop PC? (2-2)
Were you aware that cookies, which track visitor activity on websites, are being withdrawn soon?
On balance, how do you feel about this?

**Australia**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 19%
- Cynical - brands will just find a new way to track me: 33%
- All miss them - they make a better experience: 51%

**France**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 21%
- Cynical - brands will just find a new way to track me: 22%
- All miss them - they make a better experience: 56%

**Japan**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 25%
- Cynical - brands will just find a new way to track me: 25%
- All miss them - they make a better experience: 50%

**Spain**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 38%
- Cynical - brands will just find a new way to track me: 23%
- All miss them - they make a better experience: 39%

**UK**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 21%
- Cynical - brands will just find a new way to track me: 29%
- All miss them - they make a better experience: 50%

**US**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 22%
- Cynical - brands will just find a new way to track me: 23%
- All miss them - they make a better experience: 55%

**Global summary**
- Optimistic - perhaps brands will come up with a way of sharing data that is fair for everyone: 45%
- Cynical - brands will just find a new way to track me: 17%
- All miss them - they make a better experience: 38%
How much do you trust brands in the following industries to use your data to provide personalized marketing and services? (Trust and distrust only) (1-3)
How much do you trust brands in the following industries to use your data to provide personalized marketing and services? (Trust and distrust only) (2-3)
How much do you trust brands in the following industries to use your data to provide personalized marketing and services? (Trust and distrust only) (3-3)
When it comes to social media platforms and the security of your personal information, which of the following statements best describes your attitude?
And now some questions about your opinions and use of social media channels. Please note whether you agree with the following statements (1-2):

**Australia**

- I don’t think social media platforms do enough to define harmful content (e.g., hate speech, fake news): 67%
- I have a lot of content these days which doesn’t interest me: 67%
- I’m concerned about the polarization of political opinions on social media (e.g., allegations, electoral issues etc.): 67%
- I’m sharing less data with platforms because it’s too hard to track how it’s being used: 66%
- I don’t trust advertising based on social media: 66%
- I’m actively engaging less with social media for the sake of my mental health: 66%
- I have closed or stopped using an account in the last year because I have been upset by posts I have seen: 68%

**France**

- I don’t think social media platforms do enough to define harmful content (e.g., hate speech, fake news): 69%
- I have a lot of content these days which doesn’t interest me: 69%
- I’m concerned about the polarization of political opinions on social media (e.g., allegations, electoral issues etc.): 68%
- I don’t trust advertising based on social media: 68%
- I’m actively engaging less with social media for the sake of my mental health: 68%
- I have closed or stopped using an account in the last year because I have been upset by posts I have seen: 68%

**Japan**

- I don’t think social media platforms do enough to define harmful content (e.g., hate speech, fake news): 69%
- I have a lot of content these days which doesn’t interest me: 68%
- I’m concerned about the polarization of political opinions on social media (e.g., allegations, electoral issues etc.): 68%
- I don’t trust advertising based on social media: 68%
- I’m actively engaging less with social media for the sake of my mental health: 68%
- I have closed or stopped using an account in the last year because I have been upset by posts I have seen: 68%

**Spain**

- I don’t think social media platforms do enough to define harmful content (e.g., hate speech, fake news): 68%
- I have a lot of content these days which doesn’t interest me: 68%
- I’m concerned about the polarization of political opinions on social media (e.g., allegations, electoral issues etc.): 68%
- I don’t trust advertising based on social media: 68%
- I’m actively engaging less with social media for the sake of my mental health: 68%
- I have closed or stopped using an account in the last year because I have been upset by posts I have seen: 68%
And now some questions about your opinions and use of social media channels. Please note whether you agree with the following statements (2-2):
Thinking about the companies you’ve made an online purchase from in the last six months, were they based in any of the following industry sectors? (1-2)
Thinking about the companies you’ve made an online purchase from in the last six months, were they based in any of the following industry sectors? (2-2)
Of those companies you’ve purchased from in the last six months, which do you think provided the best online customer experience? (1-2)
Of those companies you’ve purchased from in the last six months, which do you think provided the best online customer experience? (2-2)
Final Dashboard (1-4)

Demographics (AUS)

Gender:
- 18-24 Years old: Male 21%, Female 25%
- 25-34 Years old: Male 23%, Female 21%
- 35-44 Years old: Male 24%, Female 25%
- 45-54 Years old: Male 30%, Female 29%
- 55-64 Years old: Male 40%, Female 39%
- 65+ Years old: Male 26%, Female 33%

Annual Household Income:
- 18-24 Years old: $15,000-$24,999 20%, $25,000-$34,999 20%
- 25-34 Years old: $25,000-$34,999 20%, $35,000-$44,999 20%
- 35-44 Years old: $35,000-$44,999 20%, $45,000-$54,999 20%
- 45-54 Years old: $55,000-$64,999 20%, $65,000-$74,999 20%
- 55-64 Years old: $75,000-$84,999 20%, $85,000-$94,999 20%
- 65+ Years old: $95,000-$104,999 20%

Demographics (France)

Gender:
- 18-29 Years old: Male 15%, Female 18%
- 30-39 Years old: Male 14%, Female 17%
- 40-49 Years old: Male 13%, Female 16%
- 50-59 Years old: Male 12%, Female 15%
- 60-69 Years old: Male 11%, Female 14%
- 70+ Years old: Male 10%, Female 13%

Annual Household Income:
- 18-29 Years old: $10,000-$19,999 10%, $20,000-$29,999 10%
- 30-39 Years old: $20,000-$29,999 10%, $30,000-$39,999 10%
- 40-49 Years old: $30,000-$39,999 10%, $40,000-$49,999 10%
- 50-59 Years old: $40,000-$49,999 10%, $50,000-$59,999 10%
- 60-69 Years old: $50,000-$59,999 10%, $60,000-$69,999 10%
- 70+ Years old: $60,000-$69,999 10%
Final Dashboard (2-4)

Demographics (Japan)

Demographics (Spain)
Final Dashboard (4-4)