THE CONSUMER'S VOICE:

Opinions, Perceptions and Expectations

Customer Experience Management Benchmark Series
2017 Consumer Edition, Executive Summary

copc®
Execs In The Know

SPOTLIGHTING CONSUMER EXPERIENCE AND OPINION

The CXMB Series is the result of a research partnership between Execs In The Know and COPC Inc. Full reports are published twice yearly in two editions — the Consumer Edition (released in early fall) and the Corporate Edition (released in late winter). The CXMB Series was first published in 2012.

What's New In This Year's Report

In this, the tenth installment of the Customer Experience Management Benchmark (CXMB) Series, customer effort is a new area of exploration. Results in this area reveal channel- and solution-specific insights, as well as consumer opinions about how much effort is required to navigate the customer care journey.

Along with new customer effort content, this year's report also ventures into entirely new territory by examining the consumer purchase experience. In particular, results compare the purchase experiences of two specific groups: In-Store and Online Shoppers. Select results from this new content can be found on page three of this executive summary. This new content joins an ever-expanding and evolving customer experience and opinion dataset, as well as channel-specific results.

We look forward to the release of the 2017 CXMB Series Consumer Edition. In the meantime, we hope you'll enjoy the select findings on the following pages.

Sincerely,

Register today!

For more information regarding **Customer Response Summit Chicago,** visit the Execs In The Know website at **ExecsInTheKnow.com.**

The complete 2017 Consumer Edition of the CXMB will be released at the Execs In The Know **Customer Response Summit Chicago**, scheduled for **September 19-21**. The findings will be noted throughout the conference, including a main stage discussion in which select leaders from top brands will share their reactions to the results. We invite you to register to attend this exceptional and informative event.

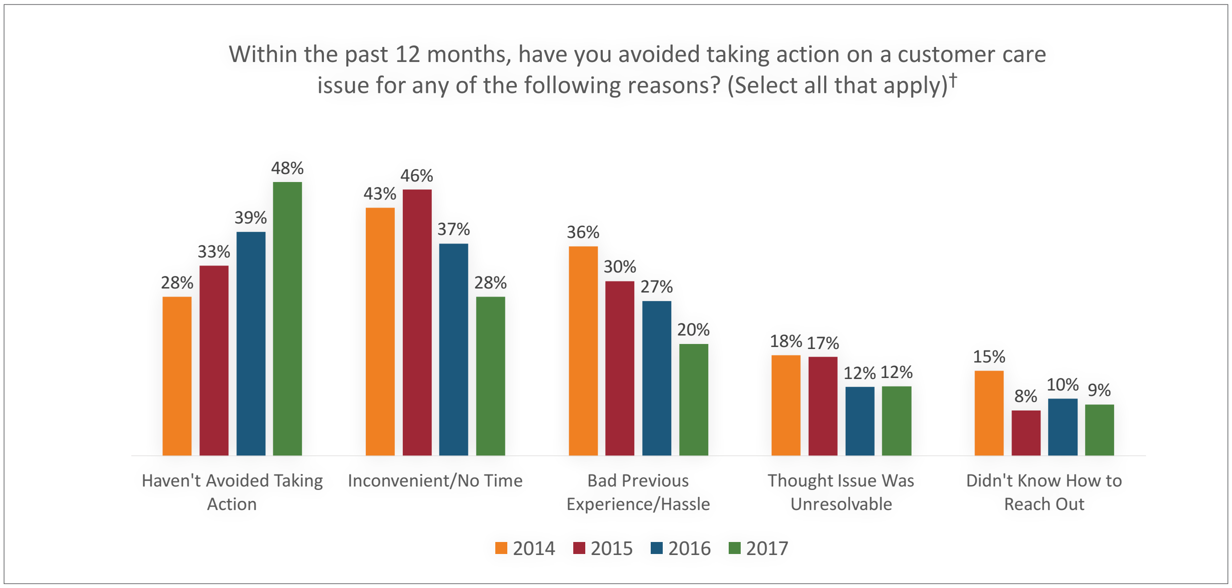
CONSUMER OPINION LEVELS OFF AND WHERE BRANDS SHOULD FOCUS

After two years of steady improvement, consumer opinion regarding how well companies are meeting needs and expectations leveled off in 2017. While it remains to be seen if this is a pause or a plateau, brands should continue to work to understand how the needs and expectations of their customers are continually evolving, and develop initiatives and strategies to accommodate these changes.

Do you feel the customer care departments of today's companies are generally meeting your customer service needs and expectations?*

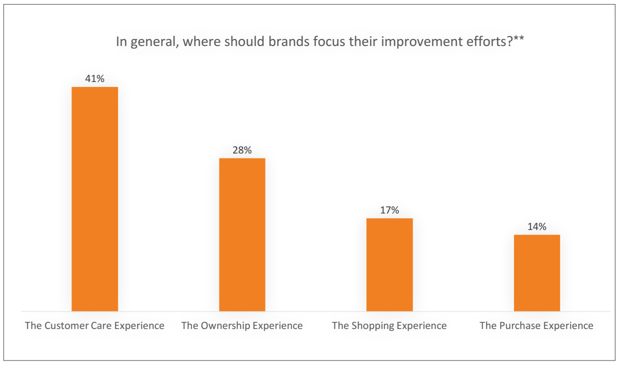
2017 — YES: 40%
2016 — YES: 41%
2015 — YES: 33%
2014 — YES: 22%

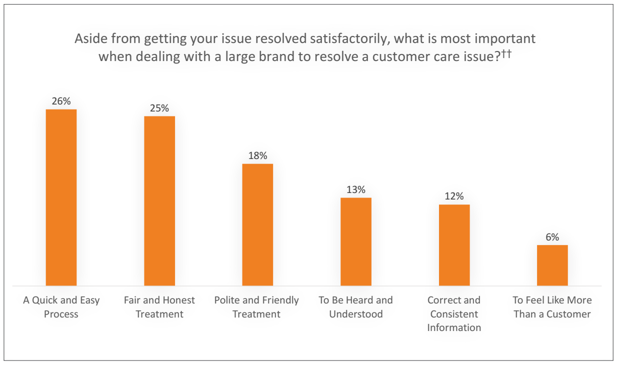
While meeting needs and expectations may have plateaued, incidences of consumers avoiding customer care interactions continue to improve. Most notable is the 26% decline in the percentage of consumers who have avoided taking customer care actions because of a bad previous experience or hassle. This is a good indication that brands are truly improving the process.



In a new question for 2017, consumers indicated that brands should focus on the customer care experience more than any other aspect of the brand-customer relationship. This reinforces other CXMB Series results that portray the customer care experience as playing a vital role in shaping brand opinion.

In another new question, half of consumers point to ease and fairness as the most important components in resolving a customer care issue. While ease is a given, treating customers fairly requires careful policy review; and it is a tightrope brands will need to walk carefully, given the abundance of competition in the marketplace.

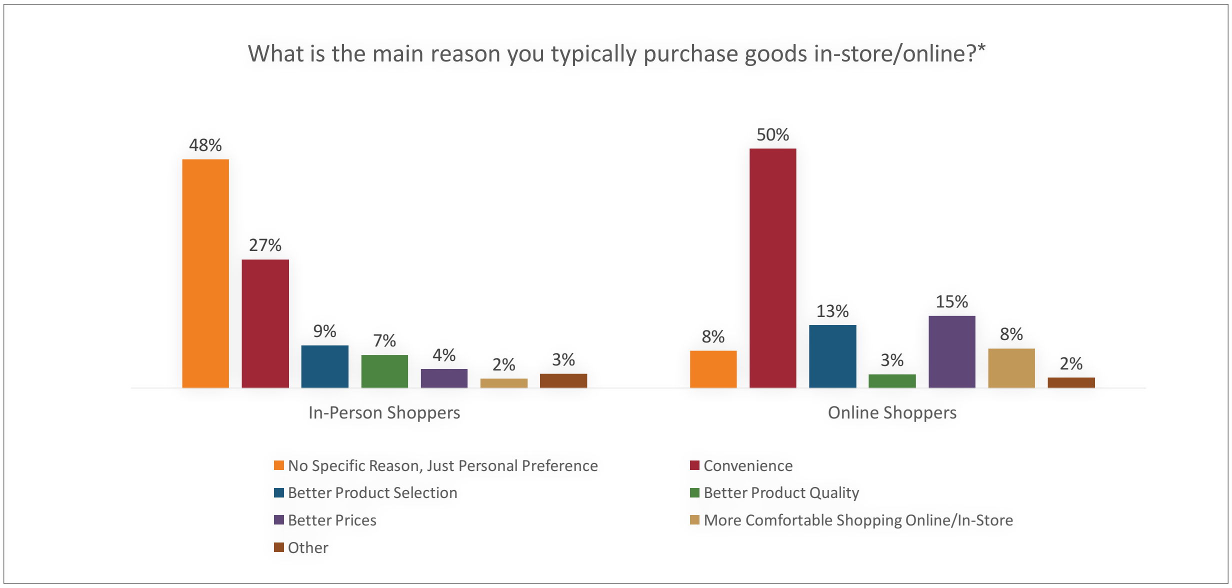




*Methodology 2017 data: Conducted by Google Consumer Surveys, June 2017 and based on 200 online responses. Sample: National Adult Internet Population.
†Methodology 2017 data: Conducted by Google Consumer Surveys, June 2017 and based on 256 online responses. Sample: National Adult Internet Population.
**Methodology 2017 data: Conducted by Google Consumer Surveys, June 2017 and based on 200 online responses. Sample: National Adult Internet Population.
††Methodology 2017 data: Conducted by Google Consumer Surveys, June 2017 and based on 200 online responses. Sample: National Adult Internet Population.

UNDERSTANDING THE DIFFERENCES BETWEEN IN-PERSON AND ONLINE SHOPPERS

New for 2017, the CXMB Series research lens widened with the introduction of a new section dedicated to the purchase experience. Furthermore, respondents were broken into two specific segments: those who primarily shop in-store, and those who primarily shop online. Differences between these two groups were immediately apparent, such as in responses to the question below. While Online Shoppers are mostly driven by convenience, In-Person Shoppers seems to be mostly driven by force of habit.



While good customer service is well-established as a critical driver of creating a positive experience, this is especially true of In-Person Shoppers — particularly when compared to their Online Shopper counterparts. Brick-and-mortar brands should take note, as the competition to win and retain customers only grows more fierce.

As reflected in the result at the top of the page, ease and convenience are of particular importance to today's Online Shoppers. While price also plays a significant role, brick-and-mortar stores need to pay special attention to what is driving consumers online and adjust their strategies accordingly.

*Methodology 2017 data: Conducted by Google Consumer Surveys, June 2017 and based on 434 (In-Person Shoppers) and 408 (Online Shoppers) online responses. Sample: National Adult Internet Population. †Methodology 2017 data: Conducted by Google Consumer Surveys, June 2017 and based on 209 (In-Person Shoppers) and 208 (Online Shoppers0 online responses. Sample: National Adult Internet Population.