



Adobe Experience Index (ANZ): Consumer Experience Expectations Score & Insights

April 2019

Executive Summary



Experiences tenets are at or above the 50% mark.

- Very similar to the US, and higher than the scores in most other countries
- “Know Me and Respect Me” and “Delight Me at Every Turn” are rated higher
- Consumers are more critical when things are broken or don't meet their expectations. “Speak in One Voice” and “Make Technology Transparent” came in lowest



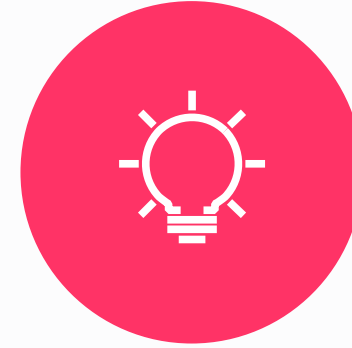
Scores are higher among those 35+.

- Higher scores are driven by “Know Me and Respect Me” and “Delight Me at Every Turn” among those 35+
- P18-24 have the highest score for “Speak in One Voice”



Consumers desire personal service and believe tech can improve their futures.

- Older consumers require personal service and are less comfortable with everyday interactions being automated
- Younger consumers more likely to see the benefits of technology in their lives



The most exciting future innovations are convenience and time-savers.

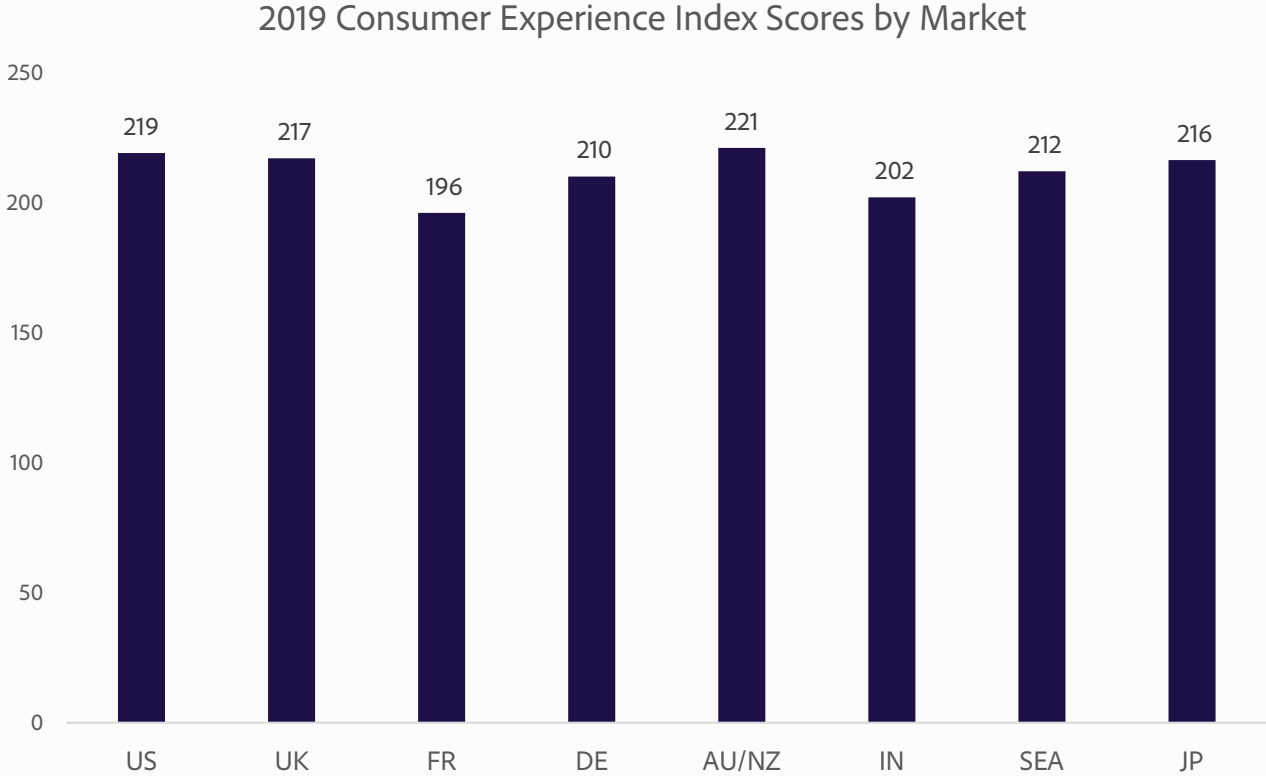
- Top ranked experiences include time saving and personalizing hotel experience and extra benefits for loyalty program
- Most negative experience scores revolve around lack of understanding of policies (e.g. ongoing fees, hidden fees, returns or cancellation)



Addressing needs – either support or future – represents the biggest area for improvement.

- Consistent with last year, across all four industries, Retail, Travel & Hospitality, Media & Entertainment, and Financial consumers gave companies low marks in terms of delivering good customer support and ability to anticipate information needs.

ANZ has highest customer experience scores



Out of 400 total possible points

Data Source: Consumer Experience Expectations Survey 2019. April 2019 n = 1,000/country



Why Does This Matter?

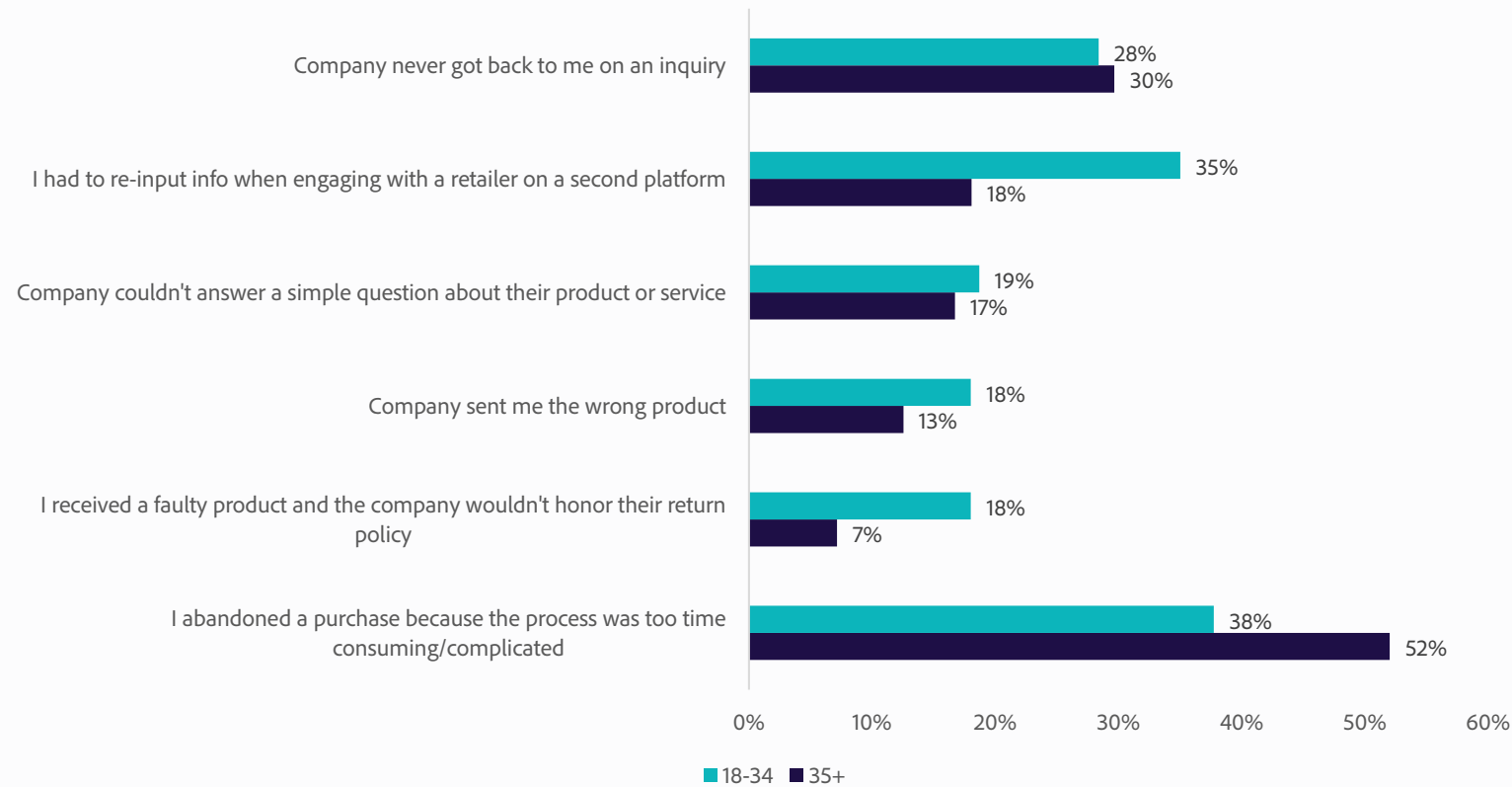
Frustrated Consumers: Challenges with user experience and customer experience are widespread; Net result is almost half abandoned a cart



Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001

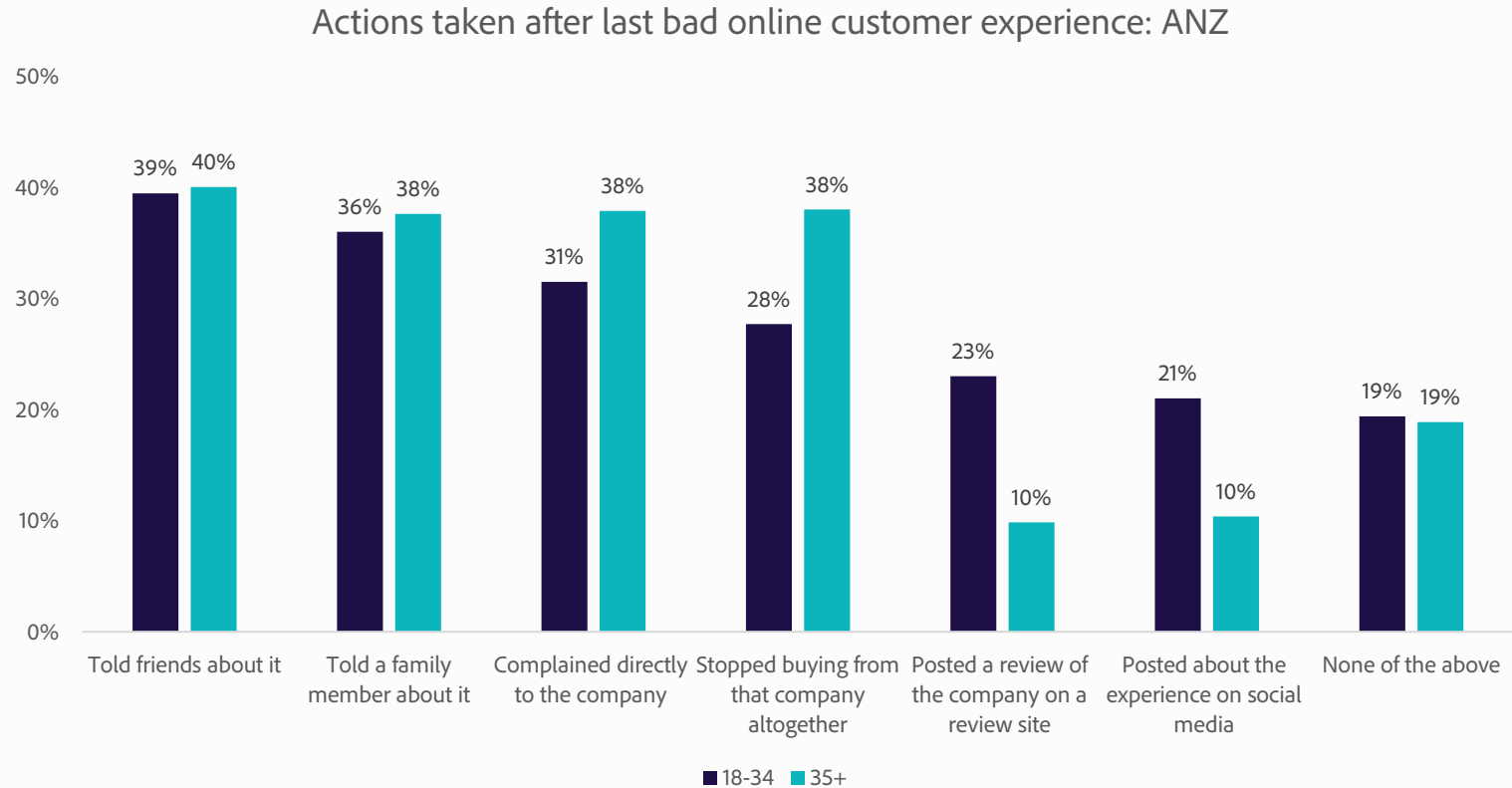
Frustrated Consumers: 1 in 3 Millennials had to re-input information across platform, but those 35+ more likely to abandon cart

Consumer Retail Experiences by Age - ANZ



Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001






Complaint Department: Millennials more likely to post online after bad experience; P35+ more likely to complain directly and stop purchasing from the company



Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001

Overall Consumer Experience Index Scores

Consumers indicate experiences have significant room to improve

Tenet	Consumer Experience Expectations Score	
Know Me & Respect Me	60 / 100	
Delight Me at Every Turn	58 / 100	
Make Technology Transparent	51 / 100	
Speak in One Voice	51 / 100	
ANZ Overall Score:	221 / 400	

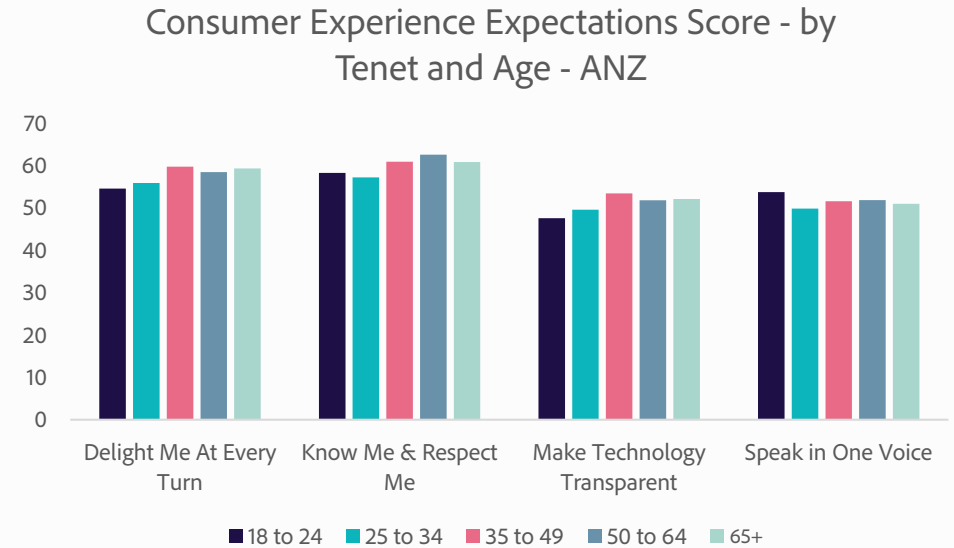
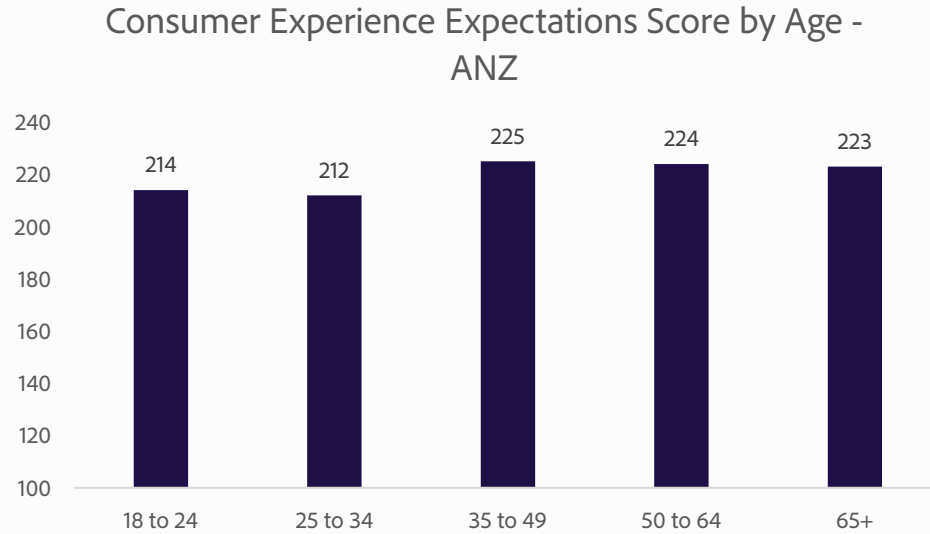
- Consumers rank experiences at an average of 55% of potential score
- 'Know Me & Respect Me' and 'Delight Me at Every Turn' are ranked higher
- Scores are very similar to the US and higher than other regions in Asia

Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001



Generational Differences

Consumers over 35 have higher experience index scores.



Out of 100 total possible points

Know Me and Respect Me and Delight Me at Every Turn drive higher scores among those 35+

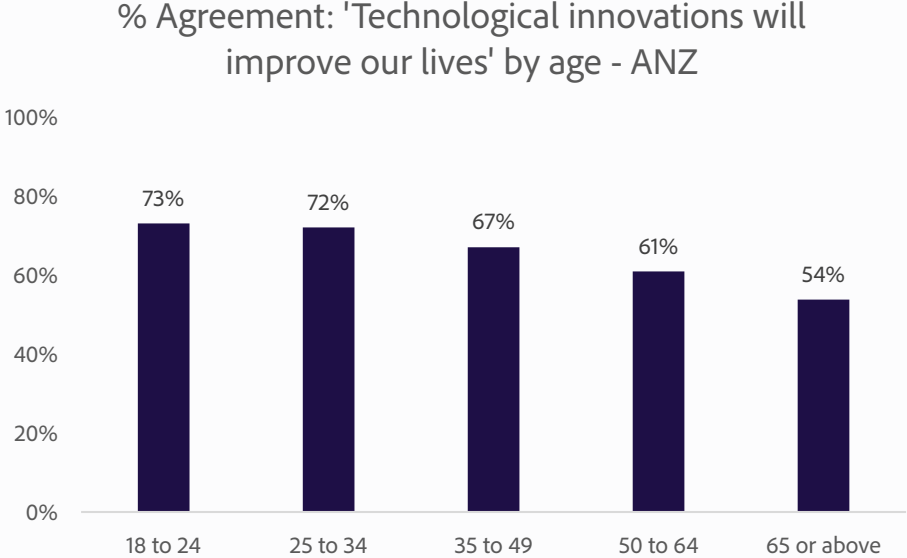
Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001



Technology Sentiment



Younger consumers more likely to see the benefits of technology in their lives



- P18-34 most convinced that technological innovations will improve their lives

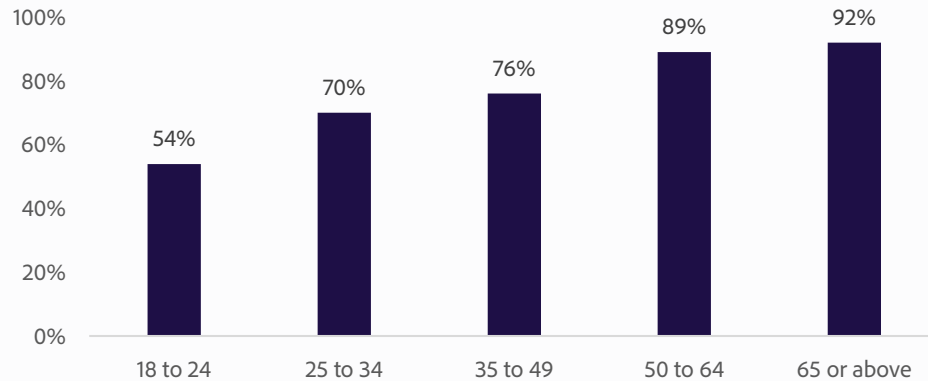
Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001



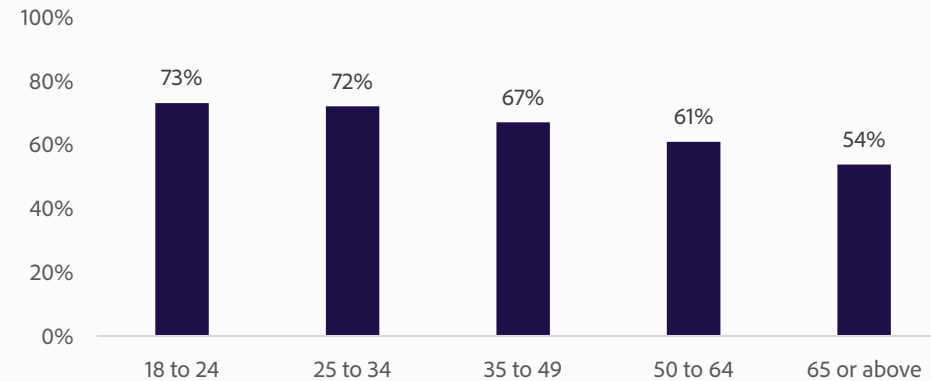
EXPERIENCE INDEX (ANZ): TECHNOLOGY INTERACTION OPINIONS BY AGE RANGE

Older consumers require personal service and are less comfortable with everyday interactions being automated.

% Agreement: 'Whether in store or online, businesses should provide personal service' by age - ANZ



% Agreement: 'If done well, a completely automated interaction with a company can still delight me' by age - ANZ



- Only half of P18-24 agree that businesses should provide person services
- 3 in 4 P18-34 agree that they can be delighted by automation

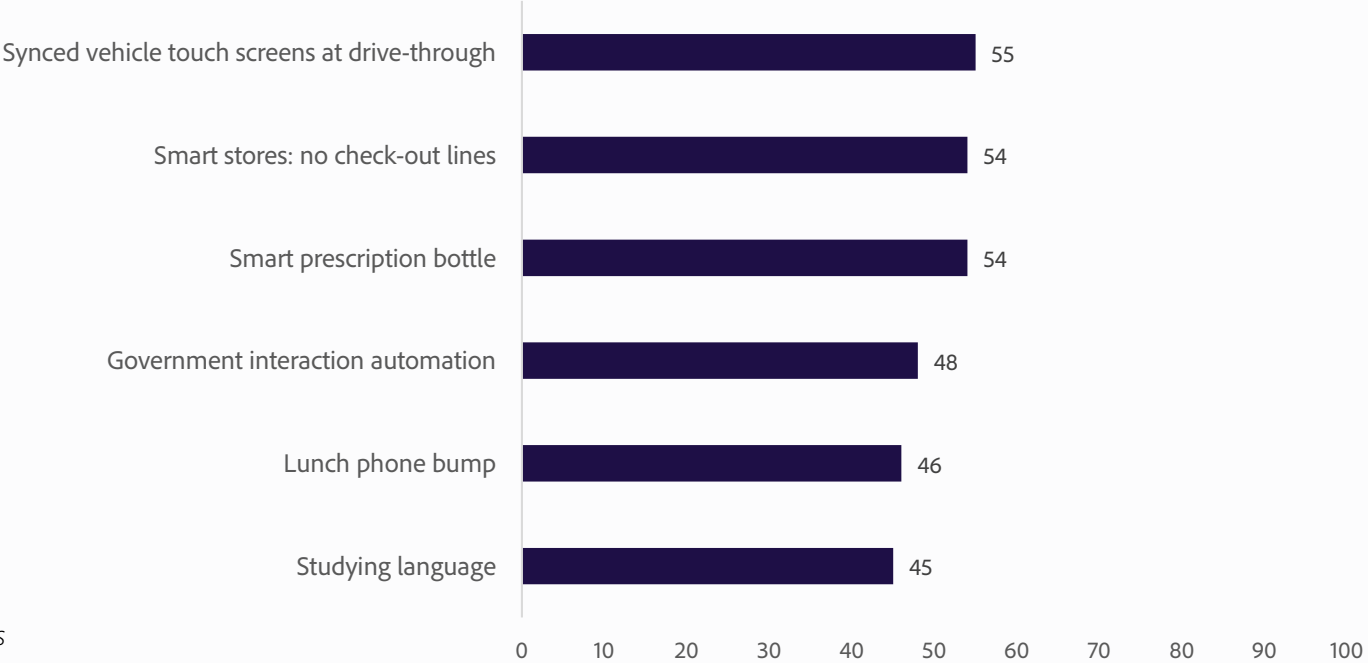
Data Source: ANZ Consumer Experience Expectations Survey 2019. April 2019 n = 1,001

Innovation and Experience Makers & Breakers

EXPERIENCE INDEX (ANZ): CONSUMER EXPERIENCE EXPECTATIONS SCORE BY TYPE

Innovations: Future innovation that helps save time is most impressive.

Futuristic Innovation Experiences Scores: ANZ



Out of 100 total possible points



Top Experience Makers (Positive): Consumers are most impressed by experiences that that save them hassle or proactively delight them.

Online retailer provides samples as part of loyalty program

Automated hotel settings and preferences upon arrival

Mobile app serves as key for hotel; no need for check-in

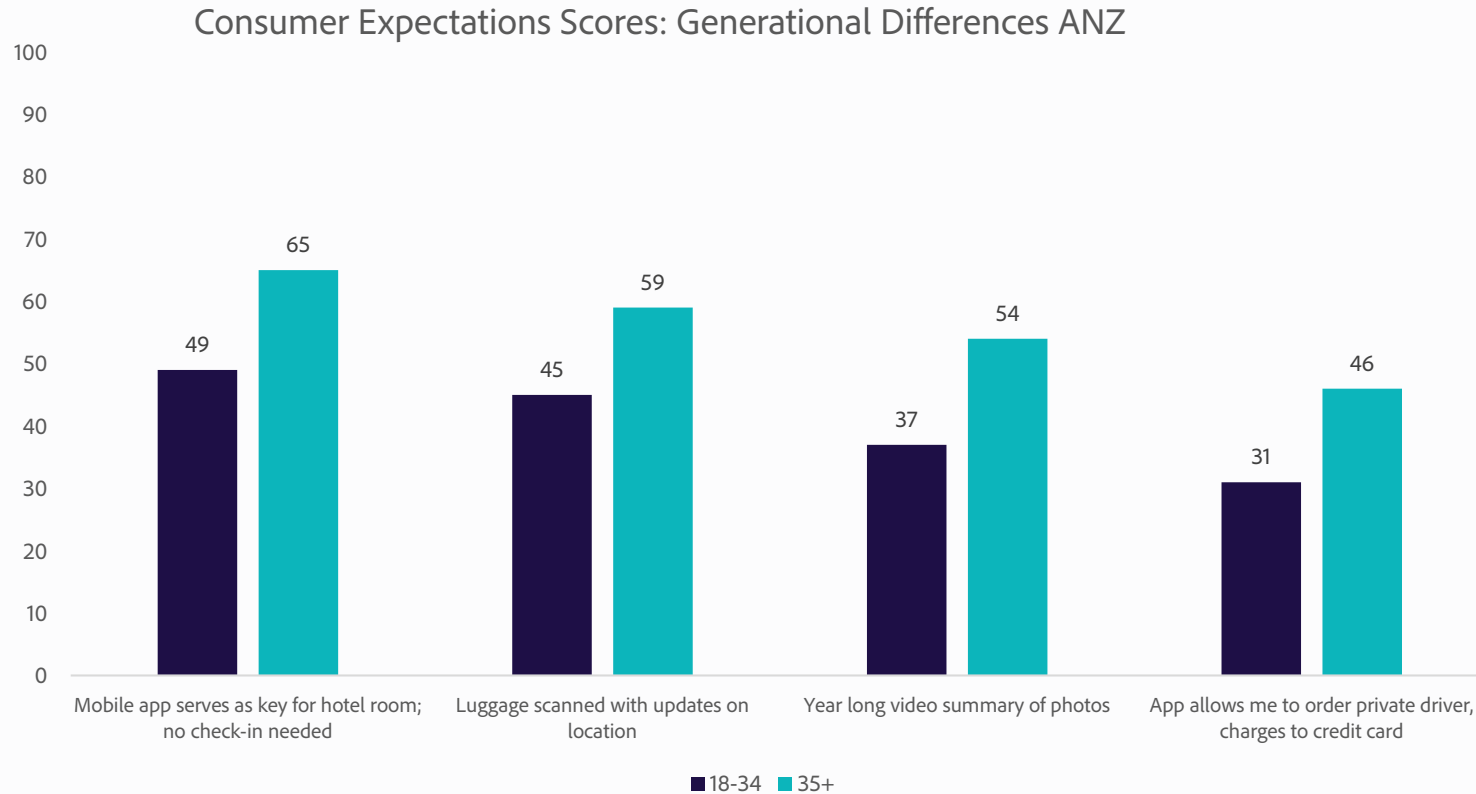
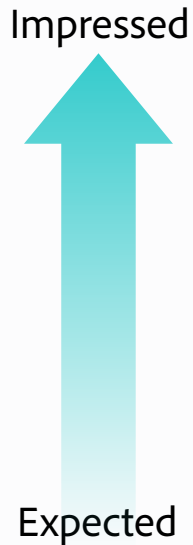


Worst Experience Breakers (Negative): Like most consumers globally, ANZ consumers find unexpected cost situations to be the biggest experience breakers.



EXPERIENCE INDEX (ANZ): CONSUMER EXPERIENCE EXPECTATIONS SCORE BY AGE RANGE

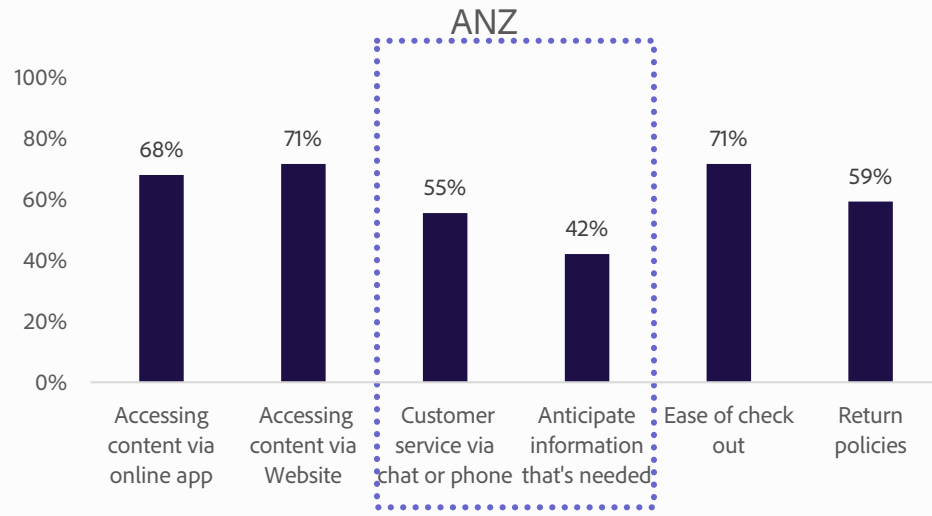
P35+ are more excited about apps that help with time saving and tracking and customized videos based on travel.



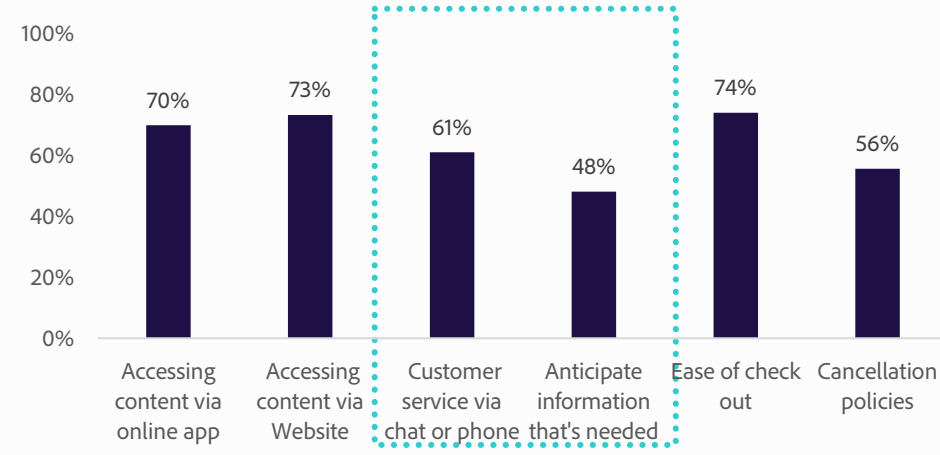
Experiences by Industry

Consumers rate customer service and anticipation of information lower across all industries.

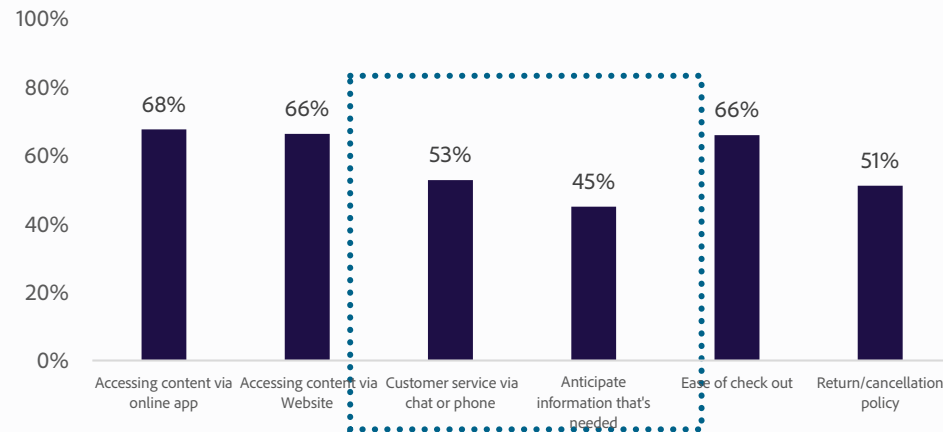
Consumer Ratings for Good Retail Experiences:



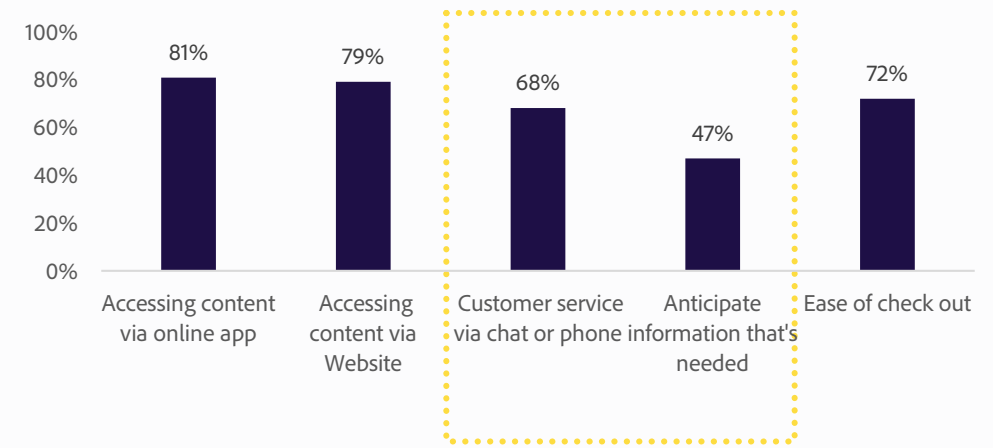
Consumer Ratings for Good Travel & Hospitality Experiences: ANZ



Consumer Ratings for Good Media & Entertainment Experiences: ANZ

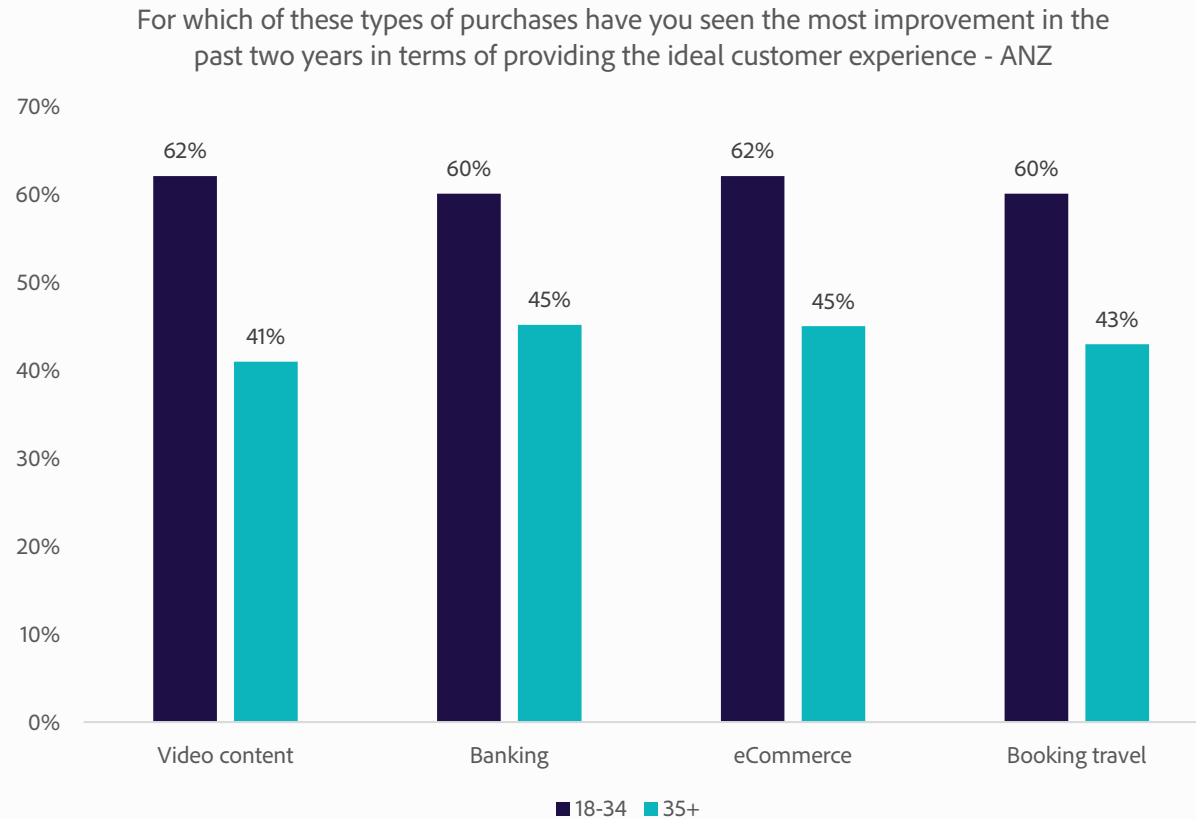


Consumer Ratings for Good Financial Services Experiences: ANZ



EXPERIENCE INDEX (ANZ): IMPROVEMENTS ACROSS CATEGORY BY AGE

What's Better?: The majority of P18-34 have seen an improvement in customer experience across categories; P35+ are less likely to have seen improvements.



Appendix

Consumer Experience Expectations Survey 2019 Methodology (ANZ)

Survey Date Range and Countries:

Conducted in April 2019



Survey Sample:

1,001 Australian and New Zealand adults 18 or older who owned a qualifying device.



Survey Format:

Online survey regarding preferences and expectations for digital experiences in the Retail, Travel & Hospitality, Media & Entertainment, and Financial Services industries.

Respondents answered questions for up to 2 industries

Consumer Experience Expectations Survey Scoring Methodology

Experiential Questions

Good Experiences

Bad Experiences

- Consumers were given several possible actions they could take when faced with a number of positive and negative experiences they might face.
- Their responses were organized in a scale that captured their reaction from strong positive to strong negative.

Response Point Allocation per Question

Positive Reaction

Strong

Mild

Neutral

Negative Reaction

Neutral

Mild

Strong



Positivity Scale

Points given based on strength of response.

No points are given for having the least positive response "as expected".

Final Score is a composite of the Positive and Negative Scenario Scores within each Tenet to produce a score out of 100 possible points per tenet, for a total of 400 possible points



Adobe