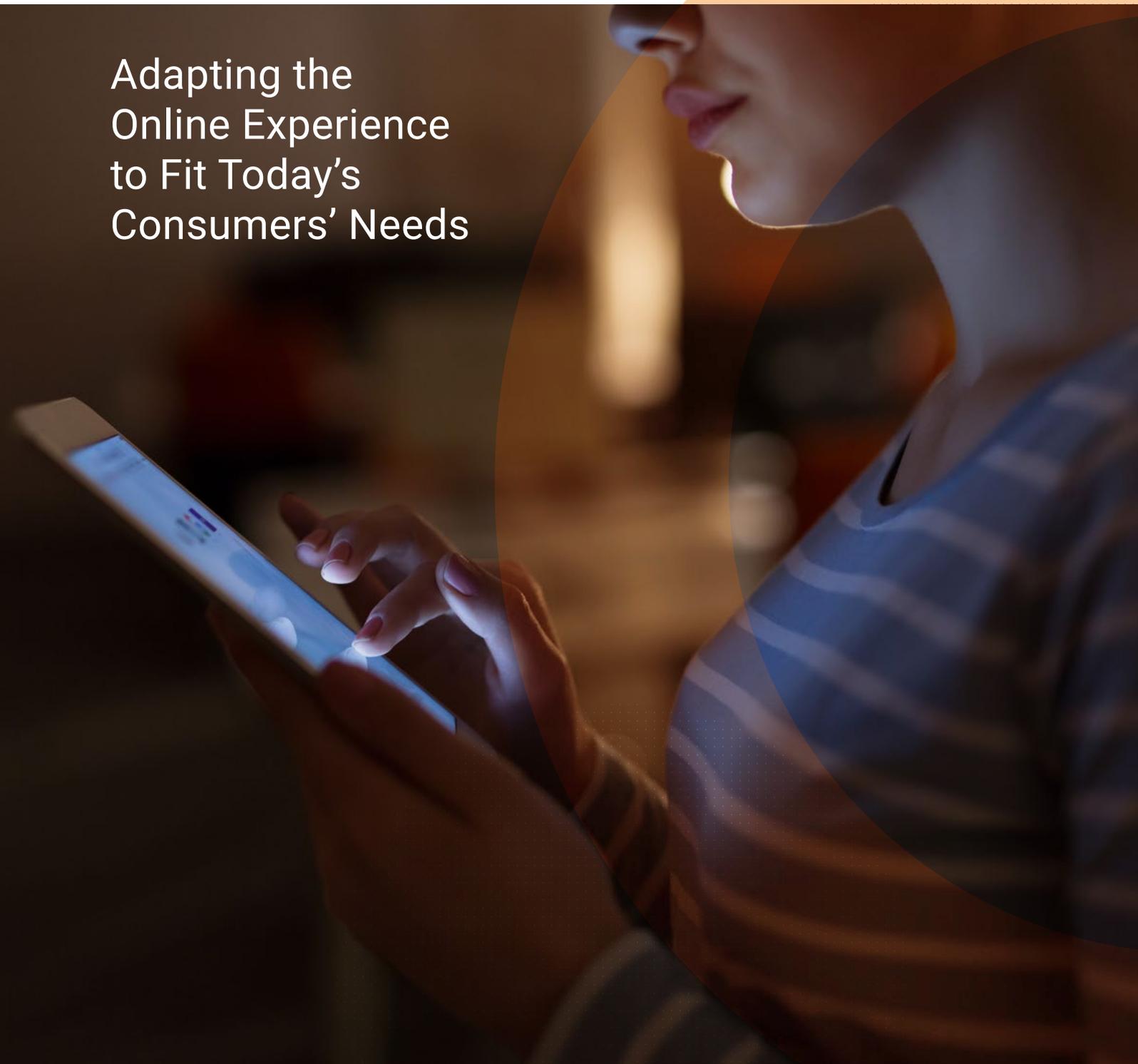


THE STRUGGLE IS REAL

Adapting the
Online Experience
to Fit Today's
Consumers' Needs





INTRODUCTION

In a year overflowing with dramatic changes, one thing remains constant, the continuing rise of consumer empowerment. Long before Covid-19 took the world by storm, consumers had increasingly grown accustomed to getting what they wanted, when, where, and how they wanted it. When they did not, they could easily go elsewhere to shop with more accommodating brands. Consumer empowerment has been accelerated by a surge in consumer data rights, seismic shifts to online buying, and a near-overnight change in decision making priorities that has exposed the cracks in the polished customer experience façade of powerhouse brands. Cracks which have been filled by lesser known brands that otherwise would not have made it into many consumer's consideration set. The chaos of 2020, and these changes, has brought about the customer experience tipping point.

In many ways, the pandemic induced shift in consumer behavior has surfaced the under-developed nature of brand-customer relationships. In a growing economy, inefficiencies are often masked by revenue growth, but in the current recession where switching is at an all-time high, brands must take a hard look at how they engage their existing customer base outside of promotional communications as well as providing a better experience to lure customers away from their competitors.

Knowledge is power but gaining said knowledge is becoming increasingly difficult.

Lost in the news cycle this year has been the start of enforcement of game changing data privacy legislation such as the California Consumer Privacy Act and greater restrictions on third-party data providers. As consumers guard information that marketers need to understand their customer base, and provide them with more relevant communications and content, brands are increasingly working to build trust. Trust that can be used to ask consumers directly for permission to get and use their data. So far, it has been a bumpy road at best.

While it is interesting to speculate about what consumers think about all of this, 3radical, in partnership with Marketing IQ, decided to go straight to the source. To better understand the current state of consumer-to-brand relationships, and help marketing leaders hone in on improvements they can make, we asked consumers in three dynamic economies across three countries (the United States (U.S.), United Kingdom (U.K.), and Singapore) for their perspectives on engaging with brands, sharing personal information, and how online customer experiences could be improved. Some of the findings may surprise you, as cultural and market differences have been in some ways magnified by the effects of the pandemic, recessions in all three countries, and super-charged regional political dynamics. Despite these differences, consumers were united in their belief that brands need to step up their game and start to build actual relationships instead of one-way dialogues.

Our research uncovered insights that will help marketers better:

- ✓ Identify those who want to build a relationship with a brand versus those whose business is for sale
- ✓ Overcome the biggest hurdles to consumers sharing their data with brands
- ✓ Listen to how their customers and prospects want to engage with them
- ✓ Create opportunities to earn zero- and first-party data from their prospects and customers which empowers marketers to better understand them and market to them more effectively
- ✓ Provide real value to customers in exchange for their data, not merely what marketers find convenient
- ✓ Move beyond the data they have traditionally used to earn data that better reflects the needs and wants today's consumer

We hope you find this research informative and invite you to contact us to learn more about building dynamic customer experiences and journeys that provide brands with a rich understanding of consumers through a transparent collection of earned data.

EXECUTIVE SUMMARY

Our objective in conducting this research was to provide marketers with a better understanding of the customer experience so they could make more informed decisions which ultimately improve customer satisfaction and help them navigate the rapidly changing consumer landscape beyond 2020. The research results paint a vivid picture of brands falling short in the eyes of consumers while providing guidance on how brands can close the gap to improve customer retention, grow revenues, and win new customers from competitors who fail to listen to their customers. Here are the key insights identified by the research:

Consumers Are Willing to Engage Outside of Shopping:

81% of consumers willingly interact with brands outside of the shopping experience, but where and why they choose to engage with their favorite brands varies. To attract and maintain engagement over time, brands need to provide non-promotional ways to engage.

It's Not Always About the Rewards:

One in four (25%) of respondents were willing to share data in exchange for more personalized shopping and communications.

Experiences Offered by Brands Are Not Living Up to Expectations:

90% of our survey respondents reported brands and retailers have work to do to improve the online customer experience. For some brands "good enough" may have once been acceptable, but, based on the chaos of 2020, when brand switching is at all-time highs and data privacy is an increasingly important part of the brand promise, the pressure is on brands to evolve their customer relationships.

Those Looking to Build Real Relationships Outnumber Bargain Hunters:

29% of consumers reported engaging to better connect with their favorite brand, outpacing those who stated they only engaged with their favorite brands for incentives and discounts, and for no other reason (23%).

Build Trust to Get Past the Gate Keeper:

Contact information has always been, and will always be, the lynchpin to activating customer and prospect data. **68%** said it is the data they are least comfortable sharing, even if provided with something of value in exchange for it.

Make It Easier for Customers to Achieve Their First Reward:

At **60%**, the most common way cited for brands to improve their loyalty programs was to lower the hurdle to earn the first reward.

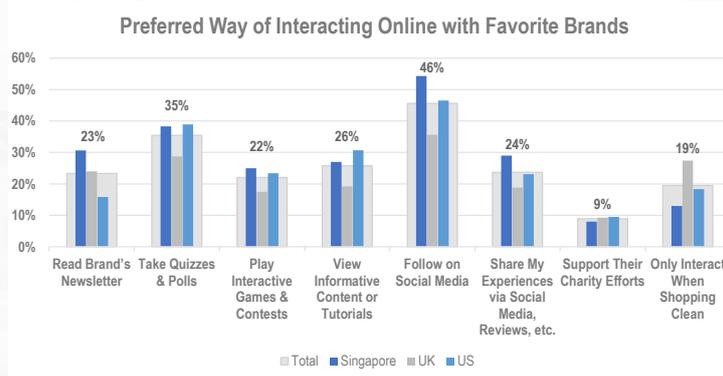
2020 may have caught many brands off guard; but this research creates a strong case for marketers to update their customer experience to build trust and relationships that will produce long-term growth and stability. Consumers made it clear their spending decisions can be influenced and their trust can be earned. The results of this survey revealed that not all customers are created equal, and the ability for brands to prioritize those who truly wish to build a relationship with their brand, over those whose business they are buying, will help focus marketers' limited time and budgets on initiatives that will yield the most impactful results for their brands. The brands that move from a one-way promotional communications approach to a two-way dialogue will be best positioned to meet the rapidly evolving needs of the consumer.

HOW CUSTOMERS CONNECT WITH BRANDS AND WHY

Many brands lack visibility into the diversity of ways in which individual consumers engage with their brand and the consumers' reasons for doing so. With 81% of customers reporting interactions with their favorite brands outside of shopping activities, brands often miss opportunities to build stronger, longer lasting, and more profitable relationships with their customers. Brands also need to enable customers to engage where, when, and how the customer desires as 53% reported interacting with their favorite brands through three or more methods.

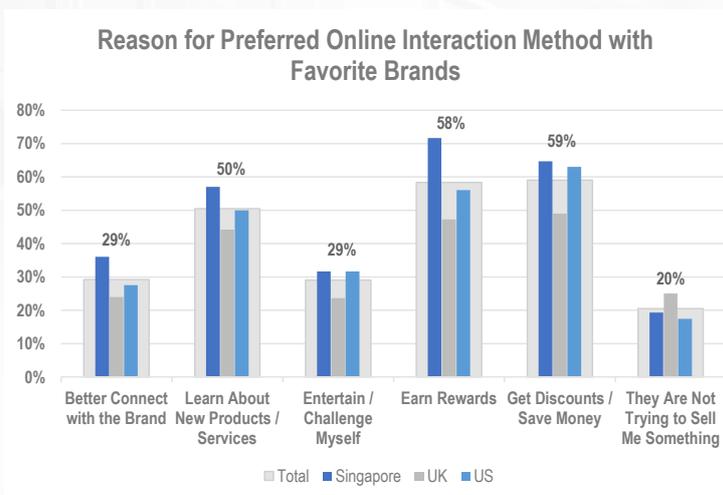
At 46%, Follow on Social Media was the mostly commonly preferred way for consumers to interact online with their favorite brands. Interestingly, less than one-third of those who follow their favorite brands on social media were interested in expressing their opinions there, with Singapore leading the way with 36% (US 24%, U.K. 19%). Therefore, brands should be cognizant that following on social media and willingness to share their experiences on social media are not the same thing. 38% of those surveyed reported engaging through quizzes and polls, which is a way for brands to learn more about their customers and to monitor changes in engagement, purchase behaviors, and satisfaction.

At the other end of the engagement spectrum are the 19% of respondents who have no interest in interacting with even their favorite brands unless they are shopping. The U.K. had the highest incidence of those saying they Only Interacted When Shopping (27%), far outpacing Singapore (13%) and the United States (18%).



Interestingly, 69% of this segment did admit when they do engage with their favorite brands outside of shopping activities it is because They Are Not Trying to Sell Me Something. Those only interacting when shopping scored the lowest for being influenced by loyalty programs. Similarly, half of those that later reported only sharing data when absolutely required (56%) were part of this group that only interacts with brands when shopping.

Collectively, at 74%, most consumers admit incentives, whether financial or rewards based, played a role in their level of engagement with their favorite brands, with Earning Rewards at 59% and Getting Discount / Saving Money at 58%.



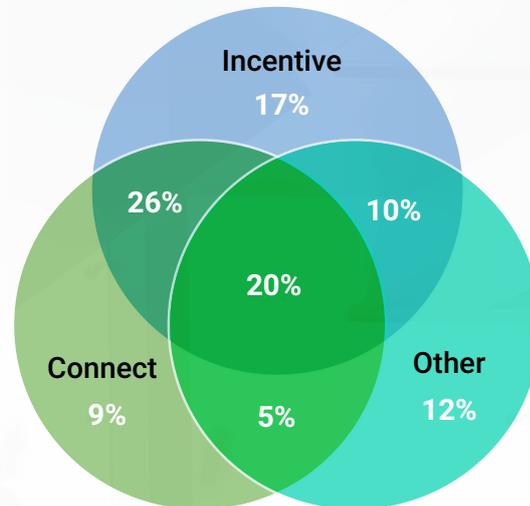
Of those reporting incentives were at least part of the reason why they interacted with their favorite brands, almost one quarter (23%) stated they only engaged for incentives and discounts and for no other reason. What is not clear is to what degree the preference for incentives is due to decades of behavioral training. Consumers know brands will continue to bombard them with discounts if they wait a few days (or in some overzealous cases a few seconds), and can often abandon a product in an online shopping cart to trigger a coupon email.

At the other end of the relationship spectrum, half of respondents (50%) reported Learning About New Products and Services as a strong third reason for their preferred ways of interacting online. Less cited reasons such as Better Connecting with the Brand and Entertaining / Challenging Themselves were

reported by a substantial number of respondents (29% respectively). Overall, 83% of respondents said they engaged for non-incentive reasons outside of shopping activities. Of those 83%, 61% said Connect With The Brand or Learn About New Products or Services was a reason why they engaged with the brand, and 15% of which reported they only engaged to Better Connect With The Brand or Learn About New Products or Services and for no other reason.



Reasons for Preferred Online Interaction Method With Favorite Brands



Other includes the following reasons for engaging: Entertain / Challenge Myself, They Are Not Trying to Sell Me Something, Other (open ended answers).

As brands look to identify their best customers and focus their limited time and budgets, separating those who are looking to build a real relationship from those shopping their business to the lowest bidder will be important. Survey respondents indicated those who are looking to Better Connect With The Brand were significantly more likely to Support Their Charity Efforts (+32%), Read The Brand's Newsletter (+25%), Share Their Brand Experiences On Social Media (+23%), and Engage With Their Informative Content Or Tutorials (+21%). Conversely, those who engaged to Earn Rewards or to Get Discount / Save Money were the least likely to have also said they wanted to Better Connect with the Brand.

	Preferred Interaction Point	Better Connect w/ the Brand	Learn About New Products & Services	Entertain & Challenge Myself	Earn Rewards	Get Discounts & Save Money	They Are Not Trying to Sell Me Something
Read Brand's Newsletter	29.0%	125	120	86	95	101	119
View Informative Content or Tutorials	44.0%	121	125	107	99	103	111
Follow on Social Media	27.4%	112	105	103	100	104	100
Share My Experiences via Social Media, Reviews, etc.	32.0%	123	111	105	104	103	111
Take Quizzes / Polls	56.6%	91	93	124	123	114	103
Play Interactive Games & Contests	29.4%	89	90	160	121	112	86
Support Their Charity Efforts	11.1%	132	124	135	101	93	98

Note: the number of indices over 100 is high because those who Only Interact While Shopping are in the base, but those indices are not included here as they did not provide reasons for engaging.

These findings of where and why customers interact with their favorite brands support the development of non-promotional engagement points which are more likely to appeal to those that want to build a real relationship. Those who prefer engaging through newsletters, informative content, and other non-incentive related means have the potential to produce a much higher life-time value for the brands they choose to interact with.

TAKE AWAYS:

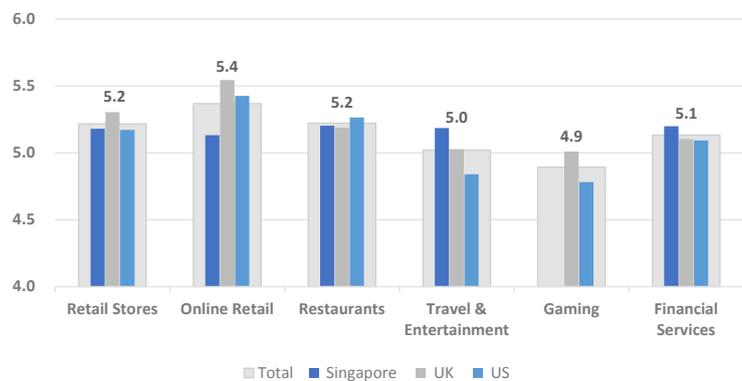
- 1 Keep Them Coming Back: Consumers want a mix of ways and reasons to engage, including non-promotional ones.
- 2 Do Not Rely Exclusively on Incentives: Many consumers will engage without an incentive, providing brands reliant on discounting with a path to reduce this dependency and improve margins.
- 3 Listen Through Quizzes and Polls: Listening is key to creating two-way dialogues, but it is also important for marketers to act on what they are told.

IN TODAY'S CHALLENGING WORLD, BAD CUSTOMER EXPERIENCES ABOUND

This year, product shortages, dramatic changes in channel availability, and new household economic constraints led to unprecedented levels of brand switching. Amid this mayhem, it is not surprising that 91% of our survey respondents reported brands have work to do to improve the online customer experience. As brands that consumers traditionally purchased from missed the mark on delivering a satisfactory customer experience, it has opened the door wide for lesser known brands to gain on powerhouse brands by offering a better customer experience.

Although many industries were ill-prepared for the massive shift to online engagement and buying in the spring of 2020, overall, online retail was the best prepared which is reflected in it earning the highest level of online customer experience satisfaction (5.4 out of 7.0). This was less true for Singapore (5.1) which is noticeably more invested in the in-person shopping experience than either the U.K. or the U.S.. Despite Online Retail being the highest rated industry overall, it showed considerable room for improvement as it scored a 5.4 out of 7.0. Nearly all survey respondents have engaged with online and offline Retail, Restaurants, and Financial Service, but Travel & Entertainment (89%) and gaming (62%) were notably lower.

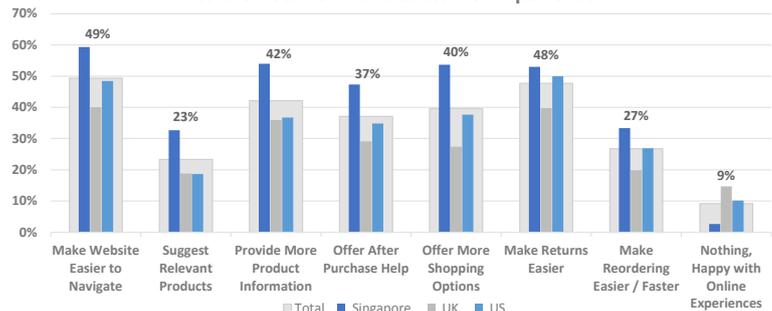
Customer Experience Satisfaction Level by Industry



Gaming, which was far more reliant on online engagement than most other industries prior to the pandemic, fared poorly with the lowest customer experience rating (4.9) of the surveyed industries. As the most regulated industry surveyed (and mostly illegal in Singapore), it should be noted other factors, beyond what individual brands can control, may have had more impact than would be experienced by other surveyed industries. Most encouraging for the Gaming industry is that its participants reported being the most influenced by loyalty programs of any surveyed industry.

As big brands look to recapture lost customers, they will need to address weak aspects of their customer experience, and those that are no longer relevant in a mid- to post-pandemic world. Our survey respondents reported an average of 2.7 areas for improvement (out of 7 surveyed), indicating there are several ways for brands and retailers to improve, differentiate themselves from their competition, and create greater brand affinity. Singapore respondents in particular were the most critical of current efforts with only 4% saying they were fully Happy with Their Online Customer Experiences and the average respondent reported 3.3 areas for improvement (U.K. 15% and 2.1 areas, U.S. 10% and 2.5 areas).

Where Consumers Want to See Improvements to the Retail & Brand Customer Experience



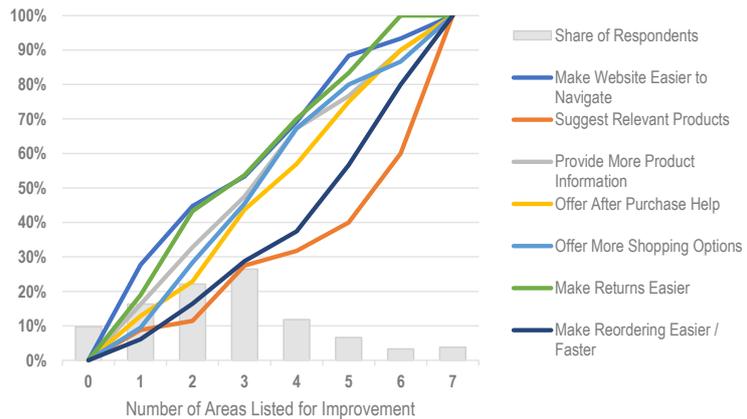
81% reported switching brands from those they regularly bought. 74% of respondents reported they had to buy different brands because those they normally purchased were unavailable and 41% reported buying different brands to try to save money.



Traditional brick-and-mortar retail still has an important role to play as a meaningful share of consumers still prefer this shopping experience despite general shifts to online. Those who found the online retail buying experience more satisfying than brick-and-mortar were 5X more likely to say they we're Happy with Online Customer Experience. More than one in five U.S. respondents (22%) still prefer traditional in-person retail experiences over online ones, with 95% of this group finding room for improvement in the online retail experience. Also true, but to a lesser degree, U.K. consumers who preferred an online retail experience were 3.5X more likely to say they we're Happy with Online Customer Experience, and 9% still preferred traditional in-person retail experiences. Interestingly, not a single respondent from Singapore who preferred the online shopping experience found it to be fully satisfactory and 25% preferred brick-and-mortar shopping experiences.

Of the seven areas surveyed for improvement, the most commonly cited were Making the Website Easier To Navigate or Search (49%), and Making Returns Easier (48%). Although the least commonly mentioned area for improvement was Suggest Relevant Products; at 23% it is still an area mentioned by a significant number of consumers reinforcing the need for marketers to evaluate how they are using their data, and where they can improve the quality and quantity of data capture to provide customers with more relevant product suggestions. For brands, this improvement to the customer experience dovetails into sales growth efforts.

Cumulative Areas for Improvement



Demands for improvement were greater from younger audiences, while those over 60 years of age were less likely to say changes were needed to improve their online customer experience across all surveyed areas. In fact, those over the age of 60 were 84% more likely to say No Improvements Needed. As marketers look to those who are most receptive to wanting more relevant content, those under the age of 45 were 17% more likely to want brands and retailers to do better at Suggesting Relevant Products.

Respondents also reported meaningful gender-based differences in how they wanted brands to improve the customer experience. Women reported being more likely to want Easier Returns (+15%) and were least likely to say they were totally happy with their online customer experience (-16%). Meanwhile, men reported being more likely to want Easier Website Navigation (+9%) and More Product Info (+8%) than women.

TAKE AWAYS:

- 1 Consumers Are Asking Brands to Help Themselves:** The top areas where consumers want to see improvements support improving conversion rates and revenue growth.
- 2 Ignore Brick-and-Mortar at Your Own Peril:** Online retail growth is undeniable, but brick-and-mortar will still be necessary for many industries and offers a fundamentally different experience for many consumers.
- 3 Different Audiences, Different Priorities:** No two customer bases are the same, so brands should prioritize customer experience improvements based on their customers' needs, business objectives, channels, and competitive landscape.

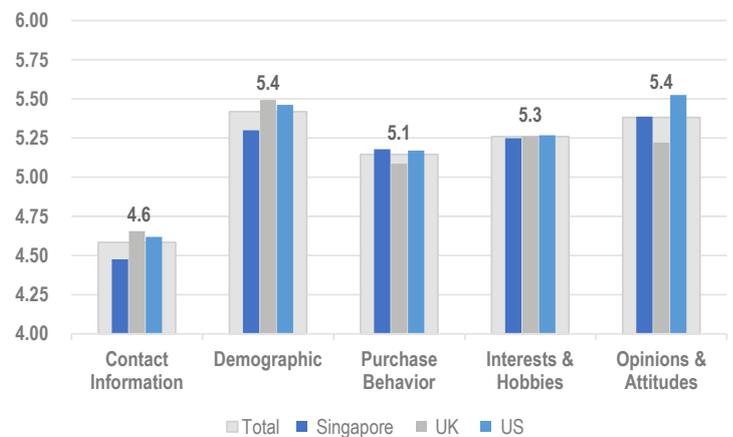
GIVE & TAKE: A GAME OF TRUST AND VALUE EXCHANGE

The world has become a very confusing place for the typical consumer. With the constant bombardment of spam and phishing emails, and the major problems stemming from identify theft, consumers are increasingly leery when it comes to requests for their personal information. Consumers are often unsure of why they need to share their data in the first place and almost always oblivious as to what happens to it once they have reluctantly handed it over. While brands are embracing transparency as part of their efforts to build trust, it is not enough. Consumers are demanding something of value in exchange for permission to use their data, and that permission is revocable under increasingly common data privacy legislation.

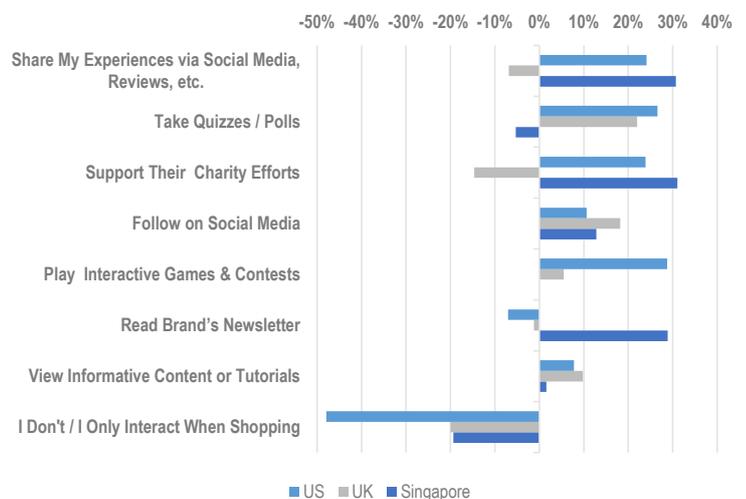
Perhaps driven by common usage, Demographic information is, on average, the data consumers are most comfortable sharing, with Opinions & Attitudes, Interests & Hobbies, and Purchase Behavior trailing closely behind. However, Contact Information is viewed fundamentally differently by consumers, with 68% stating it was the information they were **least** comfortable sharing. This guarded view of **Contact Information** was consistent across all countries and analyzed audiences. This is especially important when you consider Contact Information is the key to activating consumer data and engaging them.

Our research revealed how consumers choose to engage with their favorite brands is indicative of their likelihood to share their personal information, although this varied considerably by country. Those who interact with their favorite brands by following them on social media, were 14% more likely, on average, to be willing data sharers - the only method of engaging that showed lift across all three surveyed countries. In addition, the U.S. and Singapore showed a higher propensity to share data among those who **Share their Experiences on Social Media and Support Brand's Charity Efforts**, while in the U.K., those who preferred to Take Quizzes and Polls were most likely to be willing sharers of their data. Conversely, those who preferred to only interact when shopping were 30% less likely to be willing data sharers, with those in the U.S. being the most guarded (48% less likely).

Comfort Level of Sharing Personal Data
(by type as part of a value exchange)

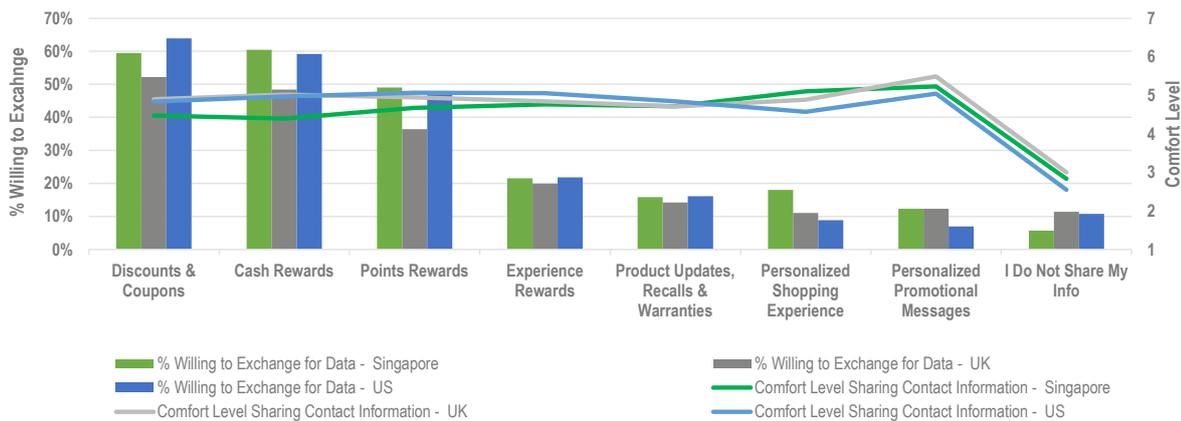


How Willing Data Sharers Engage w/ Brands
(Lift vs. Overall Areas of Engagement)



Despite consumer concerns, 81% are willing to share their data, but they increasingly want something of value in exchange. The vast majority of those willing to share (92%) said they would consider sharing their data in exchange for a traditional points, rewards, or cash incentive. Furthermore, one-quarter (25%) were willing to share in exchange for more personalized shopping (15%) and communication experiences (12%). Although, those seeking more personalized experiences is a much smaller audience, they were the most comfortable providing brands with their contact information.

What Consumers Want in Exchange for Their Personal Data & Sharing Comfort Level (Contact Information)



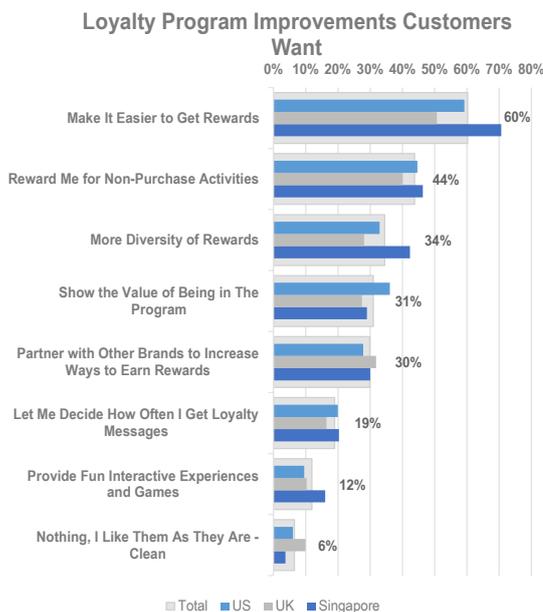
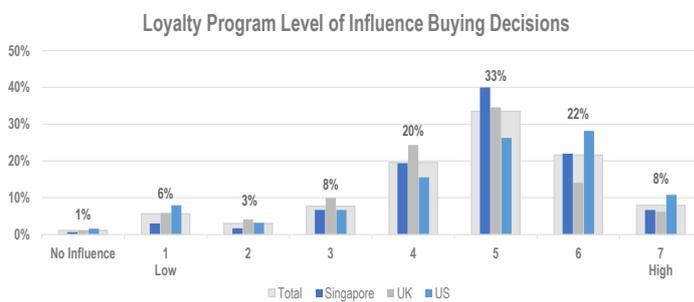
TAKE AWAYS:

- 1 Do Not Be Afraid to Ask for Data:** Most consumers are willing to share their data under the right circumstances, of which some are VERY willing to share their data.
- 2 Provide a Real Value Exchange:** A diverse value-exchange offering will appeal to a broader portion of a brand's customer and prospect bases, giving them the best chance to earn use of consumers' data.
- 3 Use Plain Language and Avoid Legalese:** Transparency is key to building trust with consumers so they are comfortable sharing their data.



LOYALTY PROGRAMS WORK, BUT NEED IMPROVEMENT

When built and executed well, loyalty programs provide businesses with a measurable and meaningful source of revenue and insights into their customer base that cannot be found through other means. They have also proven to hasten rebounds from past recessions. More than four in five survey respondents (83%) reported loyalty programs had a meaningful level of influence on their decision-making process (4 or higher on the 7 points scale); yet 94% thought there was room for improvement. Only 1% of survey respondents said loyalty programs had no influence on their decision making. So how can you get the most out of your loyalty program? Listen to your customers to understand what about your loyalty program they think is valuable.



Topping the list of ways consumers feel loyalty programs can be improved is Make It Easier to Get Rewards at 60%. Getting to that first reward, much like getting a prospect to their first purchase, is often a critical hurdle that starts to create a behavioral pattern that supports a brand's revenue and customer retention goals. This does not mean providing the current rewards at lower thresholds, but can be addressed by adding new lower value rewards and means of achieving them into the mix, while also potentially providing reward choices and options that allow the consumer to pick the reward most meaningful to them.

As brands and retailers look for ways to improve their loyalty programs, they should look at mixing in more non-conversion activities, allowing customers to engage with the brand without the constant push for a sale. More than two in five survey respondents (44%) reported they wanted to be Rewarded for Non-Purchase Activities, indicating they are open to activities that allow brands and retailers to capture earned data that will help make brands' targeted marketing efforts more effective. This indirect way of improving sales is an opportunity for brands and retailers to create more of a two-way dialogue that has a clear value exchange, while helping to keep the brand top-of-mind. In industries with longer purchase cycles, this is especially important, as it is easy for customers to focus their limited attention on more immediate needs.

TAKE AWAYS:

- 1 Get Them to Their First Reward Faster:** Evaluate your first redemption hurdle rate to see if it is turning customers away by being too difficult or time consuming to achieve. If so, look for lower value rewards that can bring the first reward forward.
- 2 Create Non-Shopping Reasons to Engage:** Look for ways to get your prospects and customers engaged with your brand outside of sales promotions.
- 3 Keep It Fresh:** Listen and update rewards and ways to engage regularly (seasonally, quarterly, etc.) to keep it interesting and the brand top-of-mind with consumers.

WHAT WILL YOU DO WITH THESE OPPORTUNITIES?

Despite the dramatic changes 2020 has brought us, one thing remains constant: the continuing rise of consumer empowerment. Over the last two years alone, marketers have witnessed a surge in consumer data rights, seismic shifts to online buying, and a near-overnight change in decision making priorities has opened the door wide for brands that traditionally lagged the established powerhouses. This has changed the playing field for how marketers need to engage with consumers. As we look at the insights developed from this research, the general themes below are ones every marketer can address, and adapt toward, with their own brand to improve the customer experience:



There Are Major Opportunities for Existing and New Brands:

Consumer behaviors may never revert to the way they were before the pandemic; so brands need to adapt to the redefined needs of their customers. Whether an existing brand trying to cement its role as an industry leader or an up-and-coming brand trying to make its mark, opportunities abound for marketers to help consumers as they face a changed reality. Brands need to treat customers like valuable humans, not transactions.



It's Time to Listen:

Marketers can learn a lot from consumers and their customers by listening to data to understand what they are doing/not doing, wanting/not wanting, and needing/not needing. Brands need to improve their communications, engagement programs, customer journeys, data collection, incentives, and loyalty programs. Developing new analytics, insights, and research can help brands remain relevant and better serve the needs of the consumer. Improved listening through earned data collection and utilization can help marketers identify real brand loyalists from disloyal bargain hunters and treat them accordingly.



Trust and Relationship Building Have Never Been More Important:

Faced with a myriad of business challenges, from new consumer data privacy rights to changing buying dynamics, brands need to be more cognizant of how consumers want to interact with their brands and why. Faced with diminished access to 3rd party data, a recession, and supply chain issues, building real relationships is increasingly important to understanding consumers and meeting their needs.

We have been excited to work on this research as it enabled us to better understand how to create a better customer experience. We hope the research data and our analysis provides you with insight into your customers' experience and informs your marketing strategies to better meet their needs.

Thank you.



RESEARCH DETAILS

1. Thinking about your favorite brands, how do you prefer to interact with them online?

	TOTAL	US	UK	Singapore
Base:	908	316	292	300
Follow on Social Media	45.6%	46.5%	35.6%	54.3%
Take Quizzes/Polls	35.5%	38.9%	28.8%	38.3%
View Informative Content or Tutorials	25.8%	30.7%	19.2%	27.0%
Share My Experiences via Social Media, Reviews, etc.	23.7%	23.1%	18.8%	29.0%
Read Brand's Newsletter	23.3%	15.8%	24.0%	30.7%
Play Interactive Games & Contests	22.0%	23.4%	17.5%	25.0%
I Don't / I Only Interact When Shopping	19.5%	18.4%	27.4%	13.0%
Support Their Charity Efforts	8.9%	9.5%	9.2%	8.0%
Other	0.9%	1.3%	1.0%	0.3%
TOTAL	205.2%	207.6%	181.5%	225.7%

2. Why do you prefer these types of online interactions?

	TOTAL	US	UK	Singapore
Base:	908	316	292	300
Earn Rewards	51.8%	50.6%	40.1%	64.3%
Get Discounts / Save Money	50.8%	55.7%	40.1%	56.0%
Learn About New Products / Services	46.1%	47.8%	39.4%	51.0%
Entertain / Challenge Myself	28.4%	31.3%	22.6%	31.0%
Better Connect with the Brand	28.0%	26.3%	22.3%	35.3%
They Are Not Trying to Sell Me Something	11.8%	11.1%	9.2%	15.0%
Other	0.9%	1.3%	1.0%	0.3%
TOTAL	217.7%	224.1%	174.7%	253.0%

3. In general, how satisfied are you with your customer experiences with the following types of businesses?

Mean				
	TOTAL	US	UK	Singapore
Base:	908	316	292	300
Retail Stores	5.22	5.17	5.30	5.18
Online Retail	5.37	5.43	5.55	5.13
Restaurants	5.22	5.26	5.19	5.20
Travel & Entertainment	5.02	4.84	5.03	5.19
Gaming	4.89	4.78	5.01	n/a
Financial Services	5.13	5.09	5.10	5.20

Retail Channel Preference				
	TOTAL	US	UK	Singapore
Base:	908	316	292	300
Prefers Brick & Morter Retail by 2+	7.7%	6.6%	7.2%	9.3%
Neutral +/-1	82.0%	81.3%	80.8%	84.0%
Prefers Online Retail by 2+	10.2%	12.0%	12.0%	6.7%

4. What can the brands and retailers you shop do to improve your online experience?

	TOTAL	US	UK	Singapore
Base:	908	316	292	300
Make Website Easier to Navigate / Find What I'm Looking For	49.3%	48.4%	40.1%	59.3%
Make Returns Easier	47.7%	50.0%	39.7%	53.0%
Provide More Product Information	42.2%	36.7%	36.0%	54.0%
Offer More Shopping Options (Delivery, Curbside Pick Up, etc.)	39.6%	37.7%	27.4%	53.7%
Offer After Purchase Help (Order Status, Assembly, How to Use, etc.)	37.1%	34.8%	29.1%	47.3%
Make Reordering Easier / Faster	26.8%	26.9%	19.9%	33.3%
Suggest Relevant Products	23.3%	18.7%	18.8%	32.7%
Nothing / Happy w Online Revised	10.8%	13.0%	15.1%	4.3%
Other	2.2%	2.8%	1.7%	2.0%
TOTAL	279.1%	269.0%	227.7%	339.7%

5. Retailers and brands often ask about your interests, preferences, and contact information to provide you with a better overall experience. In which of the following scenarios are you most willing to share your information?

	TOTAL	US	UK	Singapore
Base:	908	316	292	300
When I Sign Up for a Loyalty or Reward Program/Scheme	47.0%	47.8%	44.2%	49.0%
While Answering Polls / Surveys	39.5%	41.8%	35.3%	41.3%
During the Check-Out Process	29.0%	36.7%	23.3%	26.3%
When I Sign Up for a Contest or Discounts	26.2%	26.3%	20.9%	31.3%
While Shopping	21.1%	16.1%	19.5%	28.0%
When I Sign Up for Newsletters	19.6%	15.8%	24.0%	19.3%
While Engaging in Interactive Experiences	13.7%	10.1%	12.0%	19.0%
None, I Never Willingly Share My Information	12.2%	12.0%	14.4%	10.3%
Other	0.2%	0.6%	0.0%	0.0%
TOTAL	208.6%	207.3%	193.5%	224.7%

6. When considering whether to share your information with a brand or retailer, what do you want in exchange for sharing?

	TOTAL	US	UK	Singapore
Base:	908	316	292	300
Discounts and Coupons	61.1%	63.9%	56.5%	62.7%
Cash Rewards	58.5%	59.2%	52.4%	63.7%
Points Rewards (Redeem for Products, Sweepstakes Entries, etc.)	46.1%	47.2%	39.4%	51.7%
Experience Rewards (Exclusive Access, Special Events, Upgrades, etc.)	22.0%	21.8%	21.6%	22.7%
Product Updates (Recalls, Warranties, etc.)	16.1%	16.1%	15.4%	16.7%
More Personalized Shopping Experience	13.2%	8.9%	12.0%	19.0%
More Personalized Promotional Messages	11.0%	7.0%	13.4%	13.0%
Nothing, I Do Not Share My Information	9.8%	11.1%	12.3%	6.0%
Other	0.2%	0.3%	0.0%	0.3%
TOTAL	238.1%	235.4%	222.9%	255.7%

7. If you receive something of value in exchange for sharing your information, how comfortable would you be sharing...

Mean		TOTAL	US	UK	Singapore
	Base:	908	316	292	300
Contact Information		4.58	4.62	4.66	4.47
Demographic		5.42	5.46	5.49	5.30
Purchase Behavior		5.15	5.17	5.09	5.18
Interests & Hobbies		5.26	5.27	5.26	5.25
Opinions & Attitudes		5.38	5.52	5.22	5.39

8. How much influence do the loyalty programs/schemes you are part of have on your decisions about where you spend your money?

	TOTAL	US	UK	Singapore
Mean	4.71	4.79	4.46	4.86

9. Thinking about the loyalty programs/schemes you are a member of, what improvements would you like to see them make?

	TOTAL	US	UK	Singapore	
	Base:	908	316	292	300
Make It Easier to Get Rewards	60.6%	59.2%	51.4%	71.0%	
Reward Me for Non-Purchase Activities (Surveys, Watching Videos, Etc.)	43.7%	44.6%	40.1%	46.3%	
More Diversity of Rewards (Types, Values, Surprise Rewards, Etc.)	34.5%	32.9%	28.1%	42.3%	
Show the Value of Being in The Program (Ex. Total \$\$\$ Saved)	30.9%	36.1%	27.4%	29.0%	
Partner with Other Brands to Increase Ways to Earn Rewards	29.8%	27.8%	31.8%	30.0%	
Let Me Decide How Often I Get Loyalty Messages	18.9%	19.9%	16.4%	20.3%	
Provide Fun Interactive Experiences and Games	11.9%	9.5%	10.3%	16.0%	
Nothing / I Like Them As They Are	6.7%	6.0%	10.6%	3.7%	
Other	0.4%	0.9%	0.3%	0.0%	
TOTAL	237.6%	237.0%	216.4%	258.7%	

	TOTAL	US	UK	Singapore
Plays Or Wants Gamification Experiences	28.5%	28.2%	24.3%	33.0%
Base:	908	316	292	300

Age				
	TOTAL	US	UK	Singapore
18-29	21.6%	28.2%	17.8%	18.3%
30-44	24.3%	24.1%	22.6%	26.3%
45-60	28.5%	30.7%	26.4%	28.3%
> 60	25.6%	17.1%	33.2%	27.0%
Base:	908	316	292	300

Gender				
	TOTAL	US	UK	Singapore
Female	52.6%	56.0%	51.0%	50.7%
Male	47.4%	44.0%	49.0%	49.3%
Base:	908	316	292	300

Device Type				
	TOTAL	US	UK	Singapore
Android Phone / Tablet	39.0%	37.3%	33.0%	46.0%
iOS Phone / Tablet	31.8%	49.4%	25.3%	19.7%
Windows Desktop / Laptop	24.8%	11.7%	32.9%	30.7%
MacOS Desktop / Laptop	3.5%	1.3%	6.5%	3.0%
Other	0.9%	0.3%	1.7%	0.7%
Base:	908	316	292	300

ABOUT THIS RESEARCH

3radical commissioned Marketing IQ to design this research and analyze the results. Responses for this survey were collected between September 9th and 14th, 2020 using a demographically representative sample of adults, age 18+ from Singapore, the United Kingdom, and the United States. We asked a group of 1,076 survey panel respondents several closed-ended questions about how and why they engaged with their favorite brands, their overall customer satisfaction levels, how they felt about sharing their personal information and what they wanted in exchange for sharing, and about the how loyalty programs influence their decision making. The results aligned with Gender and Age distribution in each country, so no weighting was needed. Response totals were nearly identical for each of three countries.

ABOUT MARKETING IQ



Marketing IQ helps businesses become data-driven by improving their understanding of their customers and leveraging their data assets, including market and customer research, all the way from data privacy compliance to outbound communication programs. Not with theoretical or academic solutions, but practical and tactical outcomes that are designed to drive, and effectively measure, engagement, conversion, and ROI.

ABOUT

3radical

3radical provides organizations with an innovative way to achieve unprecedented engagement and earn data directly from their audiences. Using 3radical's award winning Voco software platform and supported by comprehensive strategy and execution services, business users have the ability to quickly create and publish interactive digital experiences based on a wide array of template mechanics and rewards informed by the latest game science theory. These compelling online experiences are delivered directly to each recipient and optimized by preference data, real-time decisioning, and learning based on billions of interactions. Every exchange results in fully-permissioned, "earned data" provided willingly by the individual in a transparent, mutually beneficial environment – critical to informing the business and elevating communication strategies, especially as other data sources become less effective. 3radical operates globally through offices in North America, the UK and Asia Pac and serves major brands across a broad range of industries.



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