Qualtrics XM institute™

DATA SNAPSHOT

Global Study: Consumer Channel Preferences, 2022

Moira Dorsey, XMP
Principal XM Catalyst

Talia Quaadgras
Senior Research Associate

Julia Chang
Senior Research Associate

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our latest global consumer study, consumers from 29 countries were asked to choose which of the following five channels they would prefer to use to complete nine common interactions: self-service on their computer, self-service on their mobile phone, chat with a person on their computer, talk with someone on the phone, or meet with someone in person. From our analysis, we found that:

+ **Consumers slightly prefer offline channels.** Overall, 53% of consumers prefer to either talk on the phone or meet with someone in person rather than one of three online channels (self-service on their computer, self-service on their mobile phone, or chat on a computer) to complete the nine common interactions we asked about.

+ **Chat is the least popular channel.** Across all age groups and countries, consumers would prefer to use chat on their computer to complete an interaction just 9% of the time, the least of any channel. Meeting in person is the most popular channel preference, with consumers choosing this option 30% of the time on average.

+ **Younger consumers are the least likely to prefer self-service through a computer.** Compared to the other two age groups, these consumers are the least likely to choose to complete activities through self-service on their computers. Instead, they are the most likely to use self-service on their mobile phone and chat on their computer.

+ **Spanish consumers have the least preference for online channels.** Spanish consumers would prefer to use one of three online channels just 33% of the time, the least of all countries. Indian consumers prefer to use online channels at double this rate, 66%— the strongest preference for online channels across all countries.

+ **Indonesian consumers prefer to use self-service on their phones the most.** On average, 41% of Indonesians said they prefer to use self-service on their mobile device. South Korean consumers have the second-strongest preference for this channel, at 39%.

STUDY KEY FACTS

- Global consumer study
- Online panel
- Conducted in Q3 2022
- 29 countries
- 33,093 consumers

Global Study: Consumer Channel Preferences

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2022. Using an online survey, XM Institute collected data from 33,093 consumers across 29 countries: Argentina, Australia, Belgium, Brazil, Canada, China, Colombia, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Africa, South Korea, Spain, Taiwan, Thailand, the United Arab Emirates, the United Kingdom, the United States, and Vietnam.

XM Institute surveyed approximately 1,200 consumers from each of the countries except those listed below. To ensure that the data was reflective of the population within those countries, we set quotas for responses to match the gender, age, and income demographics of each country.

The following countries' sample sizes are as follows: Hong Kong, 693. Malaysia, 757. New Zealand, 983. Singapore, 1112. South Africa, 871. Taiwan, 1143.

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Methodology

Average Across Interactions by Age

KEY TAKEAWAYS

+ Of these five channels, consumers have the strongest preference to meet with someone in person to complete nine common interactions. This preference is strongest for consumers ages 55 and over, and weakest among those ages 35-54.

+ About half (47%) would prefer to use one of three online channels rather than an offline channel for nine common activities. This preference is weakest for older consumers and strongest for consumers ages 35-54.

+ Younger consumers are least likely to prefer talking on the phone and are most likely to use self-service on their mobile devices.

ABOUT

This chart shows which channels consumers across different age groups would prefer to use for nine common interactions.

Average channel preferences for completing nine common interactions

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person

■ Self-service on your mobile phone ■ Talk to someone on the phone

Age	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Overall	16%	22%	9%	22%	30%
18-34	12%	27%	11%	20%	31%
35-54	15%	25%	9%	22%	28%
55+	20%	16%	7%	25%	32%

Average Across Interactions by Country (Part 1)

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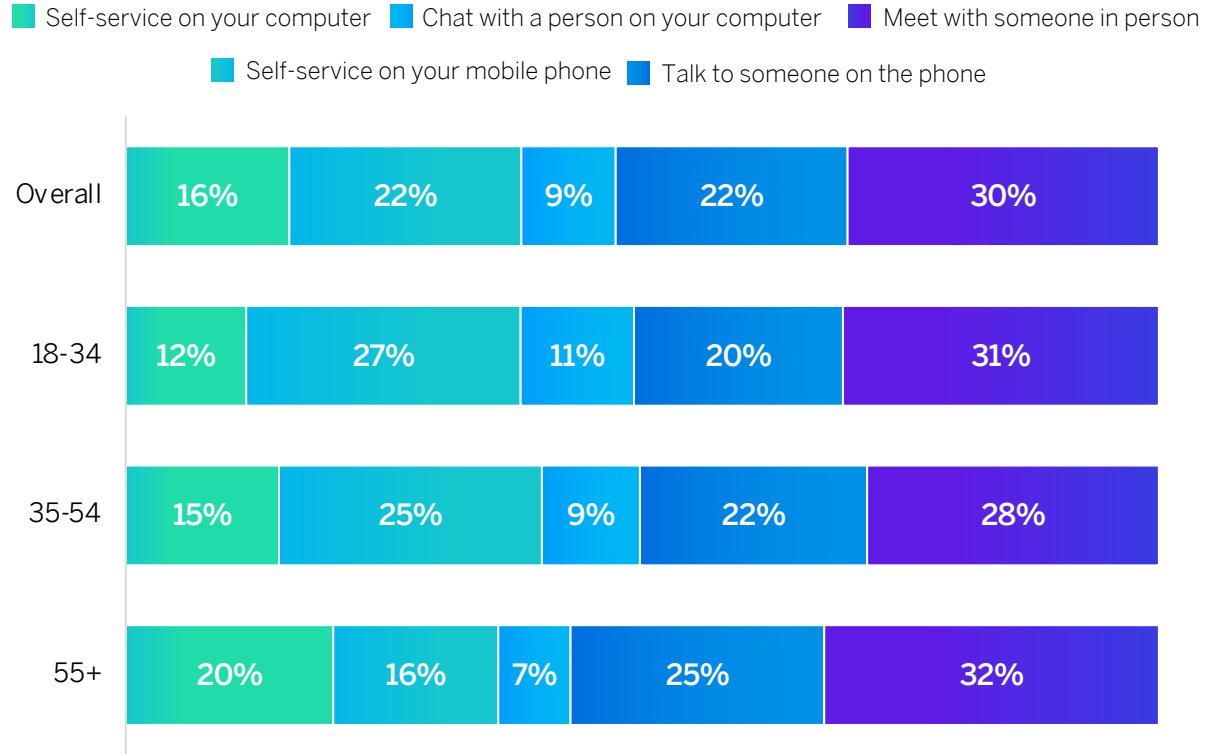
KEY TAKEAWAYS

+ After Spanish consumers, Colombians least prefer using one of three online channels for nine common interactions.

+ Chinese and Vietnamese consumers are equally most likely to prefer using chat on their computers to accomplish nine common activities. French and Indonesian consumers are least likely to prefer this channel.

+ Canadian consumers have the strongest preference to call on the phone to complete nine common interactions, followed by US consumers. Indonesian consumers least prefer this channel.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to use for nine common interactions.

Average channel preferences for completing nine common interactions

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person
■ Self-service on your mobile phone ■ Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Argentina	15%	19%	10%	27%	30%
Australia	21%	17%	9%	25%	28%
Belgium	20%	15%	7%	23%	35%
Brazil	13%	26%	7%	22%	33%
Canada	18%	13%	9%	31%	28%
China	8%	31%	16%	14%	32%
Colombia	11%	18%	8%	29%	34%
France	19%	19%	5%	23%	34%
Germany	23%	9%	11%	27%	31%
Hong Kong	16%	28%	8%	18%	30%
India	29%	26%	10%	21%	13%
Indonesia	9%	41%	5%	10%	36%
Italy	16%	19%	7%	24%	33%
Japan	23%	18%	8%	21%	30%
Malaysia	13%	26%	9%	15%	37%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Average Across Interactions by Country (Part 2)

KEY TAKEAWAYS

+ Spanish consumers have the strongest preference of all 29 countries to meet in person to accomplish these nine activities, followed by Filipino consumers.

+ After Indonesians, South Korean consumers have the strongest propensity to use mobile self-service. German consumers have the weakest preference to use this channel for their interactions.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to use for nine common interactions.

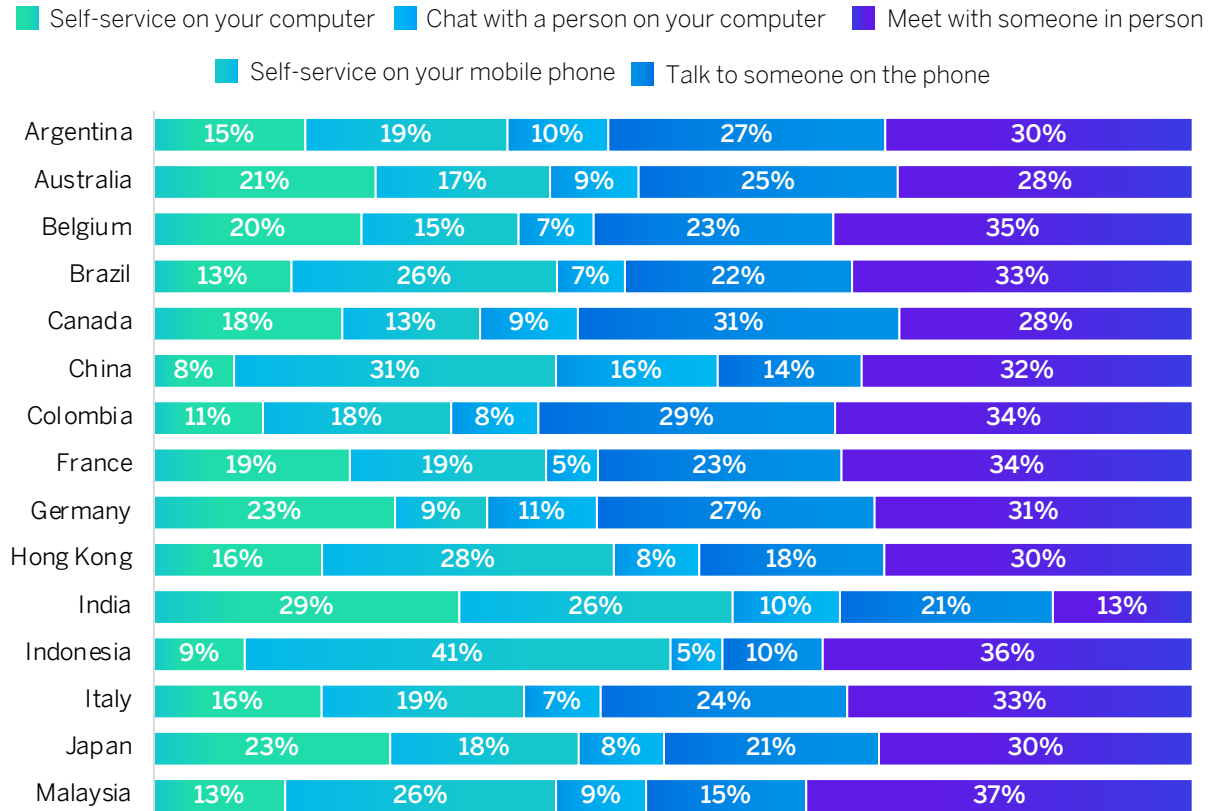### Average channel preferences for completing nine common interactions

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Mexico	12%	19%	9%	26%	34%
Netherlands	22%	17%	8%	26%	26%
New Zealand	20%	19%	7%	25%	29%
Philippines	8%	20%	11%	23%	38%
Singapore	20%	25%	7%	21%	27%
South Africa	12%	27%	7%	20%	34%
South Korea	15%	39%	6%	18%	21%
Spain	11%	16%	6%	25%	43%
Taiwan	17%	23%	15%	12%	33%
Thailand	10%	33%	12%	22%	22%
UK	20%	19%	10%	26%	25%
UAE	14%	27%	11%	23%	25%
US	16%	19%	10%	29%	27%
Vietnam	6%	27%	16%	22%	29%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Get Technical Support by Age

KEY TAKEAWAYS

+ Overall, consumers slightly prefer to get technical support through the two offline channels (57%) than through the three online channels. This preference is most pronounced among consumers over the age of 55.

+ Consumers aged 35-54 are least likely to want to meet with someone in person to get technical support, while those under the age of 34 are most likely to prefer this channel.

ABOUT

This chart shows which channels consumers across different age groups would prefer to use to get technical support for a computer.

"In which of the following ways would you most prefer to get technical support for a computer?"

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person
■ Self-service on your mobile phone ■ Talk to someone on the phone

	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Overall	14%	14%	15%	29%	28%
18-34	12%	16%	17%	25%	30%
35-54	13%	16%	16%	29%	25%
55+	15%	11%	13%	33%	29%

Get Technical Support by Country (Part 1)

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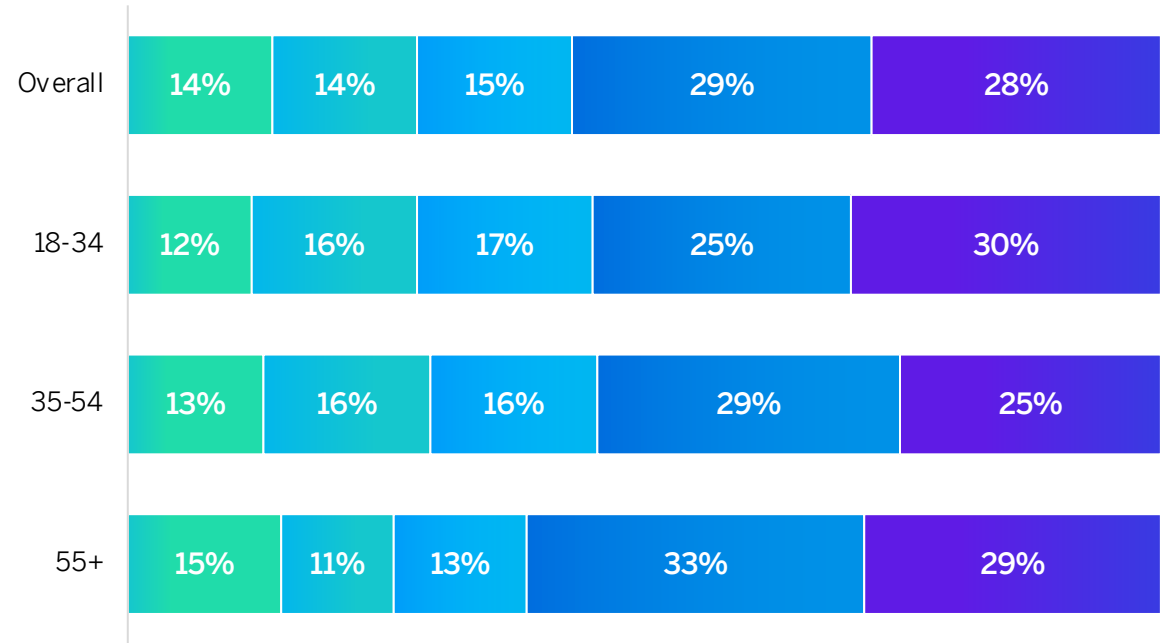
KEY TAKEAWAYS

+ Of all 29 countries, Indian consumers have the highest preference for self-service channels, while Canadian consumers have the least preference for them.

+ Canadian consumers most frequently prefer to talk to someone over the phone to get technical assistance of all 29 countries, while Indonesians are least likely to prefer this option.

+ Indonesian consumers are most likely to prefer meeting with someone in person for tech support, along with Spanish consumers.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to use to get technical support for a computer.

"In which of the following ways would you most prefer to get technical support for a computer?"

■ Self-service on your computer   ■ Chat with a person on your computer   ■ Meet with someone in person
■ Self-service on your mobile phone   ■ Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Argentina	11%	12%	17%	36%	24%
Australia	14%	10%	15%	35%	25%
Belgium	11%	7%	14%	33%	34%
Brazil	11%	18%	10%	25%	36%
Canada	9%	6%	22%	45%	19%
China	10%	28%	15%	15%	32%
Colombia	7%	13%	12%	36%	32%
France	10%	10%	9%	40%	30%
Germany	17%	6%	18%	35%	24%
Hong Kong	19%	20%	10%	28%	24%
India	31%	22%	10%	23%	15%
Indonesia	14%	20%	8%	11%	47%
Italy	11%	10%	14%	28%	38%
Japan	21%	13%	19%	31%	16%
Malaysia	13%	14%	13%	22%	39%

Get Technical Support by Country (Part 2)

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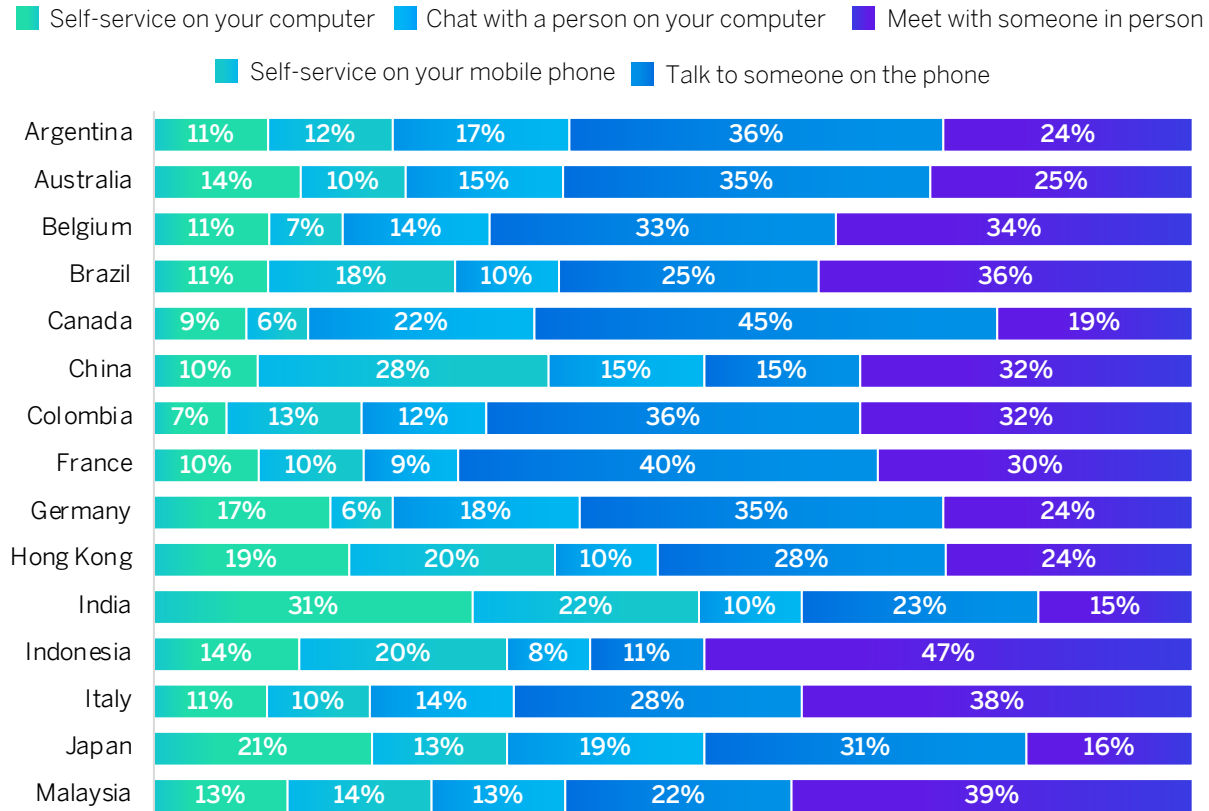
KEY TAKEAWAYS

+ Spanish consumers are least likely of all countries to prefer using online channels to get tech support, with just 25% preferring these 3 channels. The French are second-least likely to prefer these channels.

+ Of all 29 countries, Thai consumers are least likely to prefer meeting with someone in person to get tech support.

+ Taiwanese and Thai consumers have the strongest preference of all countries to use chat to complete this interaction, at 21%.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to use to get technical support for a computer.

"In which of the following ways would you most prefer to get technical support for a computer?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Mexico	9%	15%	14%	37%	25%
Netherlands	12%	9%	16%	32%	30%
New Zealand	13%	8%	18%	34%	28%
Philippines	9%	9%	18%	29%	35%
Singapore	16%	14%	12%	35%	24%
South Africa	15%	15%	14%	24%	32%
South Korea	21%	25%	18%	18%	19%
Spain	8%	9%	8%	28%	47%
Taiwan	21%	16%	21%	17%	25%
Thailand	16%	26%	21%	23%	14%
UK	14%	10%	20%	35%	21%
UAE	16%	18%	18%	22%	26%
US	9%	11%	19%	41%	19%
Vietnam	10%	17%	20%	20%	33%
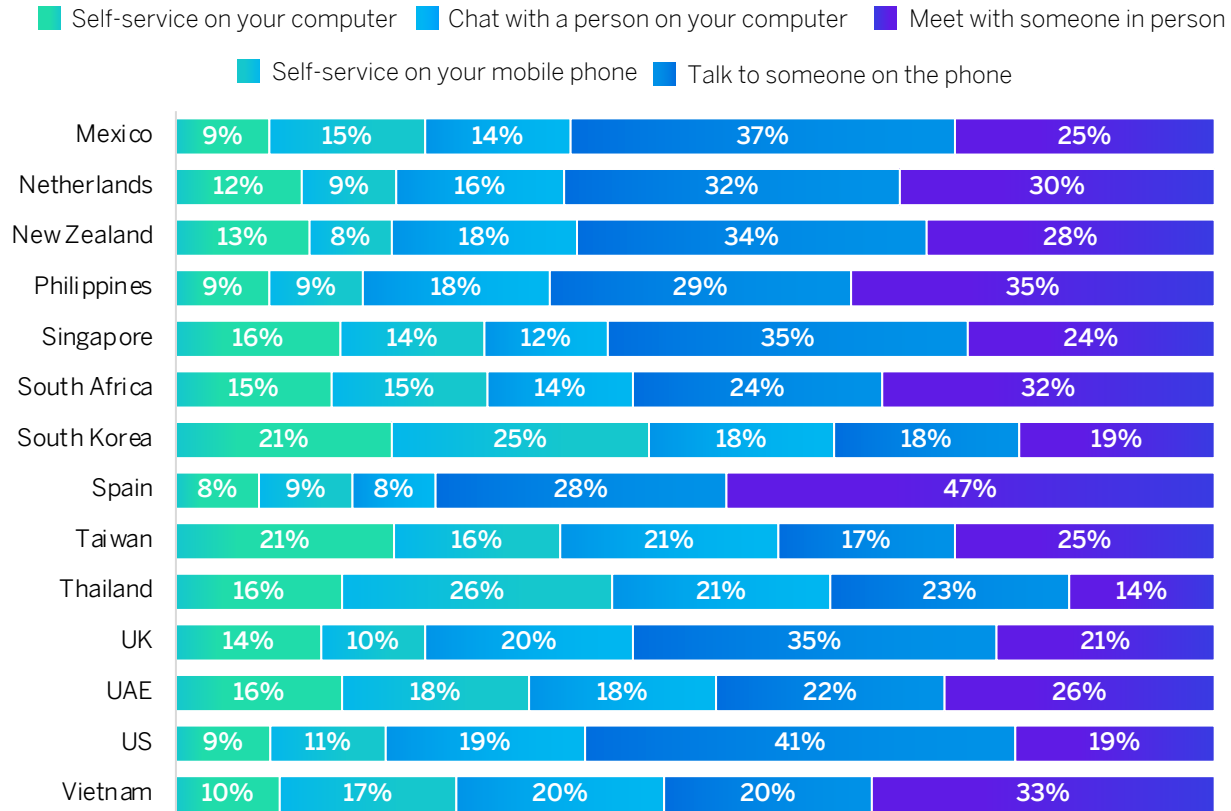
Resolve a Billing Issue by Age

KEY TAKEAWAYS

+ Overall, consumers would prefer (61%) to use one of two offline channels rather than the three online channels to resolve a billing issue.

+ Almost half of older consumers would prefer to talk on the phone with someone in order to fix a billing issue, while just one-third of consumers under 35 would prefer this channel.

+ Three in 10 consumers under the age of 55 prefer to use a self-service channel to deal with billing problems.

ABOUT

This chart shows which channels consumers across different age groups would prefer to use to resolve an issue with a bill.

"In which of the following ways would you most prefer to resolve an issue with a bill?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Age	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Overall	9%	18%	11%	39%	22%
18-34	7%	23%	13%	33%	25%
35-54	9%	21%	12%	37%	20%
55+	11%	11%	9%	48%	22%
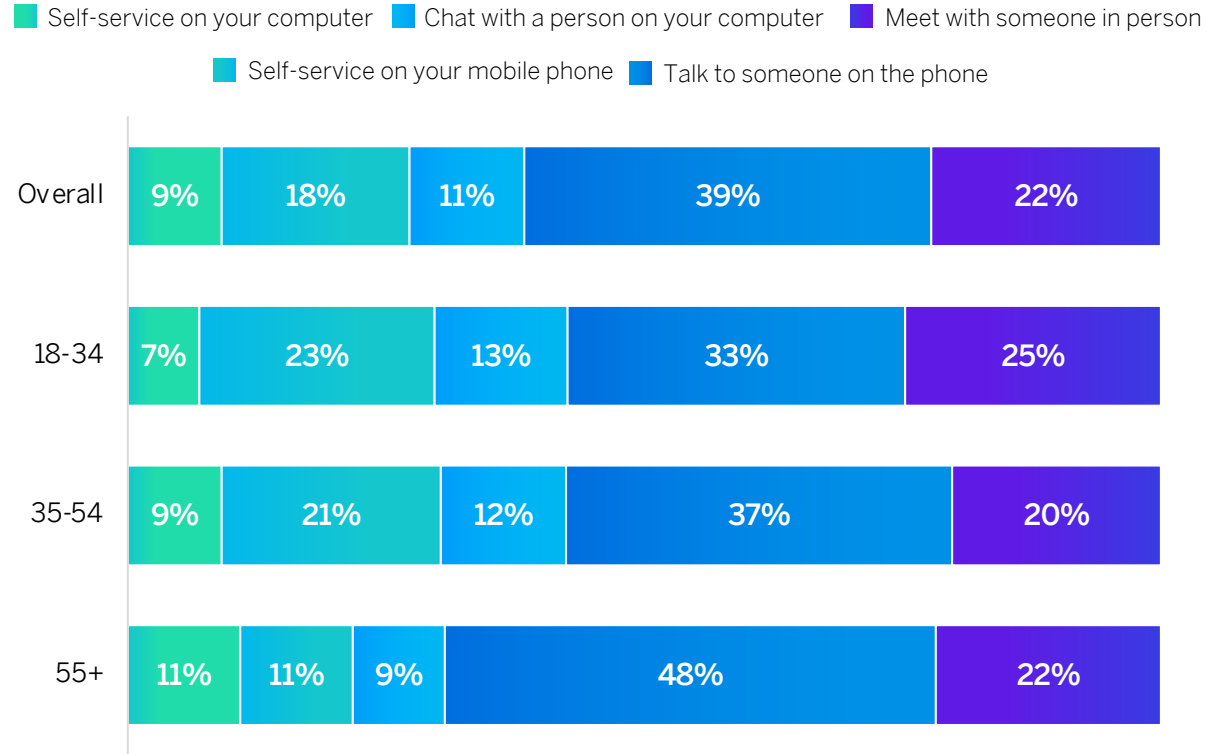
Resolve a Billing Issue by Country (Part 1)

KEY TAKEAWAYS

+ Across all 29 countries, Indian consumers have the highest propensity to use a self-service channel to fix a billing issue, followed by Indonesian and South Korean consumers.

+ Sixty-two percent of Canadian consumers prefer to resolve billing problems over the phone, while just 15% of Indonesian and Chinese consumers say the same, the weakest preference for that channel across all 29 countries.

+ After Spanish consumers, Colombian consumers are the least likely to prefer using one of three online channels to resolve their billing issues.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to use to resolve an issue with a bill.

"In which of the following ways would you most prefer to resolve an issue with a bill?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Argentina	6%	13%	11%	42%	29%
Australia	13%	11%	14%	48%	14%
Belgium	8%	8%	13%	52%	19%
Brazil	8%	26%	9%	37%	21%
Canada	7%	7%	12%	62%	12%
China	8%	32%	15%	15%	30%
Colombia		12%	8%	43%	35%
France	9%	9%	7%	55%	20%
Germany	11%	6%	11%	55%	17%
Hong Kong	15%	26%	8%	35%	16%
India	29%	26%	10%	24%	11%
Indonesia	11%	40%	5%	15%	30%
Italy	7%	16%	9%	49%	20%
Japan	15%	12%	10%	45%	18%
Malaysia	10%	29%	12%	24%	24%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Resolve a Billing Issue by Country (Part 2)

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KEY TAKEAWAYS

+ Of all 29 countries, Spanish consumers have the greatest preference to meet in person with someone to resolve a billing issue, while Indian consumers are least likely to prefer this option.

+ 40% of South Korean and Indonesian consumers would prefer to fix a billing issue through self-service on their mobile phones. In contrast, just 6% of Germans would prefer the same – the strongest aversion to this channel of all countries.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to use to resolve an issue with a bill.

"In which of the following ways would you most prefer to resolve an issue with a bill?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Mexico	6%	12%	8%	37%	38%
Netherlands	8%	9%	16%	51%	16%
New Zealand	12%	12%	11%	53%	13%
Philippines		16%	12%	35%	34%
Singapore	13%	20%	9%	45%	13%
South Africa	7%	21%	7%	30%	35%
South Korea	9%	40%	7%	32%	12%
Spain		7%	7%	40%	43%
Taiwan	13%	27%	16%	24%	20%
Thailand	6%	26%	16%	31%	21%
UK	11%	10%	15%	51%	13%
UAE	11%	25%	12%	32%	20%
US	7%	11%	14%	53%	14%
Vietnam	7%	29%	14%	20%	31%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Book an Airline Ticket by Age

KEY TAKEAWAYS

+ More than 7 in 10 consumers prefer to use one of three online channels to book airline tickets. Additionally, more than 6 in 10 prefer to use a self-serve channel to do so.

+ Consumers 55 or older have the highest propensity for using an offline channel to book a plane ticket, at 31%.

+ Consumers under the age of 55 prefer the most to use their mobile phones to book an airline ticket.

ABOUT

This chart shows which channels consumers across different age groups would prefer to use to book an airline ticket.

"In which of the following ways would you most prefer to book an airline ticket?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

Age	Self-service on your computer	Chat with a person on your computer	Meet with someone in person	Self-service on your mobile phone	Talk to someone on the phone
Overall	34%	29%	8%	13%	16%
18-34	28%	36%	10%	12%	15%
35-54	30%	33%	9%	14%	15%
55+	43%	20%	6%	14%	17%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
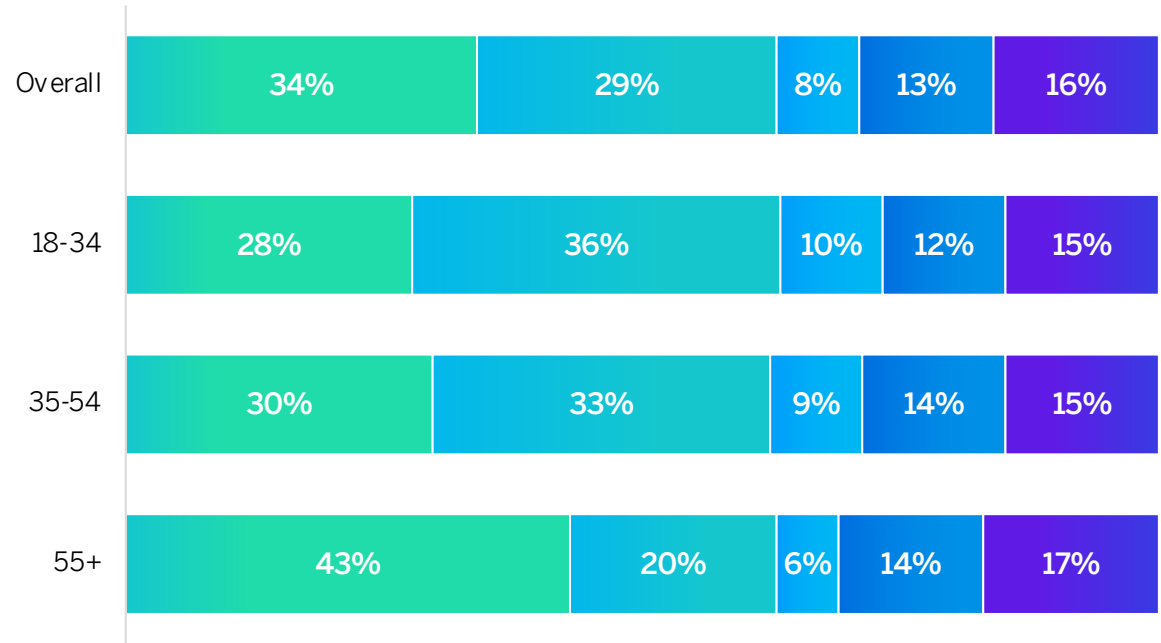
Book an Airline Ticket by Country (Part 1)

KEY TAKEAWAYS

+ Of all countries, South Korean consumers have the strongest preference to book airline tickets through online channels, followed closely by Indonesians.

+ Chinese consumers have the strongest preference to book through offline channels, at 42%, followed by Vietnamese consumers (40%).

+ German consumers are least likely to prefer booking through self-service on their phone, at 10%, while South Korean consumers prefer this channel the most frequently, at a rate five times that of Germans.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to use to book an airline ticket.

"In which of the following ways would you most prefer to book an airline ticket?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Argentina	38%	22%	9%	13%	17%
Australia	43%	20%	6%	15%	16%
Belgium	43%	19%		10%	24%
Brazil	31%	26%	8%	14%	20%
Canada	44%	16%		22%	14%
China	7%	34%	18%	12%	30%
Colombia	32%	22%	13%	18%	16%
France	45%	25%		10%	18%
Germany	46%	10%	11%	10%	23%
Hong Kong	37%	31%	11%	9%	12%
India	36%	29%	11%	17%	8%
Indonesia	11%	69%			11%
Italy	37%	29%	6%	10%	18%
Japan	45%	30%	8%	9%	8%
Malaysia	35%	41%	7%	6%	11%

Book an Airline Ticket by Country (Part 2)

KEY TAKEAWAYS

+ Taiwanese and Vietnamese consumers have the highest propensity of all countries to book airline tickets through chat on their computer, at 17%.

+ Mexican and Canadian consumers are most likely to call on the phone to book a plane ticket, at 22%.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to use to book an airline ticket.

"In which of the following ways would you most prefer to book an airline ticket?"

■ Self-service on your computer　■ Chat with a person on your computer　■ Meet with someone in person
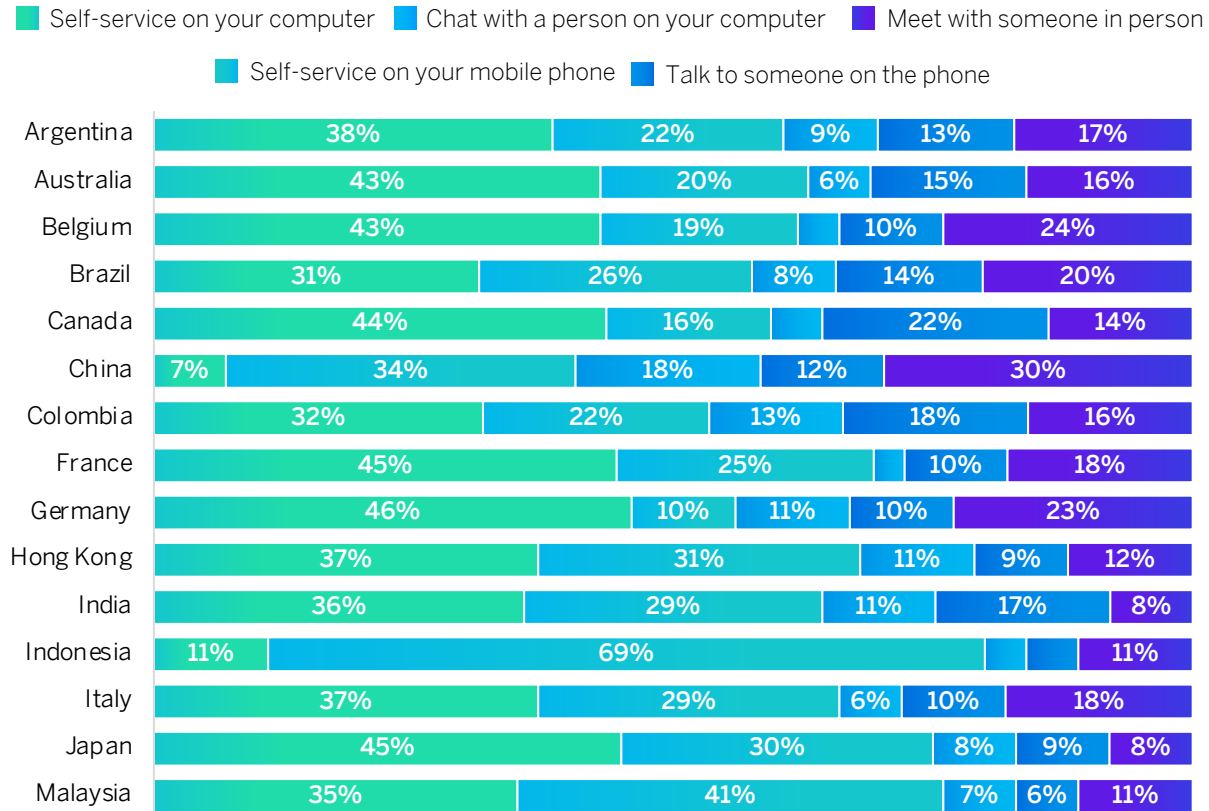■ Self-service on your mobile phone　■ Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Mexico	30%	24%	8%	22%	16%
Netherlands	46%	19%	5%	15%	15%
New Zealand	44%	24%	4%	10%	18%
Philippines	29%	30%	9%	17%	16%
Singapore	44%	28%	5%	12%	11%
South Africa	33%	43%	5%	9%	11%
South Korea	30%	50%	5%	11%	5%
Spain	33%	23%	5%	14%	25%
Taiwan	31%	27%	17%	10%	14%
Thailand	15%	47%	12%	16%	11%
UK	40%	23%	8%	15%	15%
UAE	27%	31%	10%	16%	15%
US	39%	30%	7%	15%	9%
Vietnam	8%	36%	17%	18%	22%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Buy a New TV by Age

KEY TAKEAWAYS

+ Over half of consumers would prefer to buy new TVs by meeting with someone in person; more than 3 in 5 consumers ages 55 or older would prefer this channel.

+ Consumers ages 35-54 have the strongest preference to use self-service and online channels when buying a new TV.
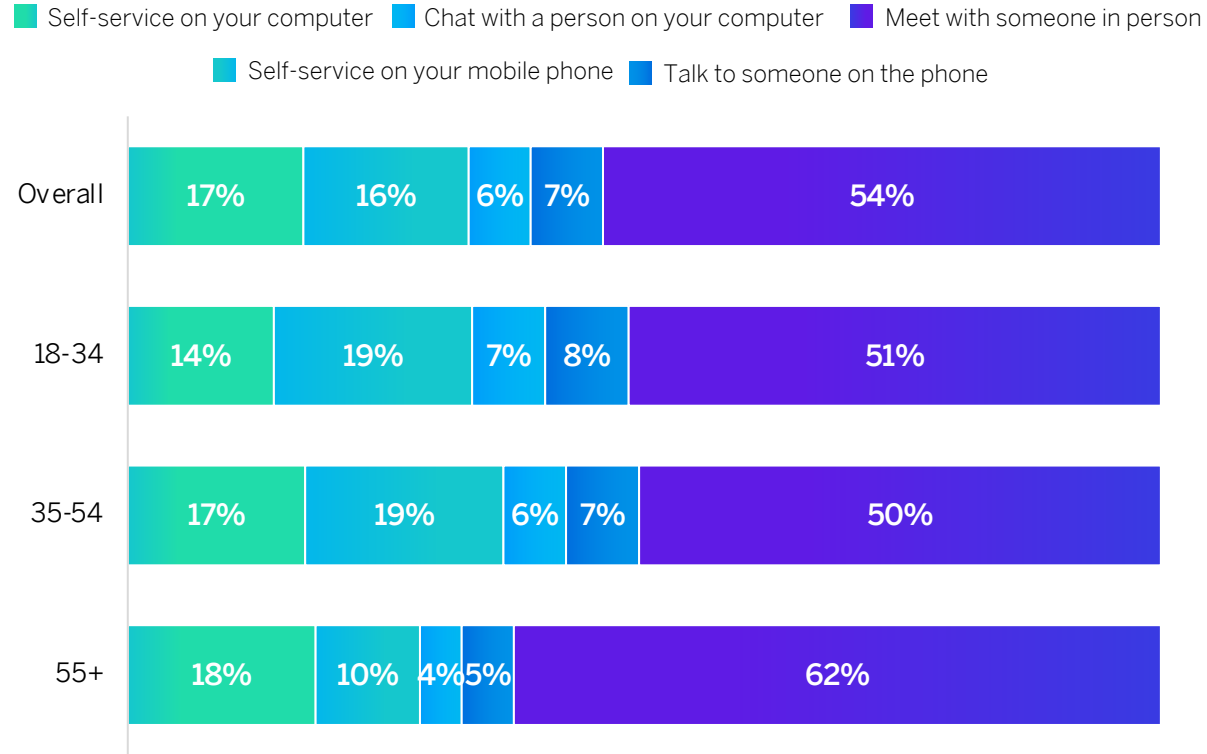
ABOUT

This chart shows which channels consumers across different age groups would prefer to use to purchase a new TV.

"In which of the following ways would you most prefer to purchase a new TV?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Overall	17%	16%	6%	7%	54%
18-34	14%	19%	7%	8%	51%
35-54	17%	19%	6%	7%	50%
55+	18%	10%	4%	5%	62%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Buy a New TV by Country (Part 1)

KEY TAKEAWAYS

+ Of all 29 countries, Indian consumers have the weakest preference for buying new TVs in person (18%), followed by Chinese consumers, at 33%.

+ Chinese and Thai consumers are most likely of all countries to prefer using mobile self-service to buy a new TV, at 29%. Germans least prefer this option, at 7%.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to use to purchase a new TV.

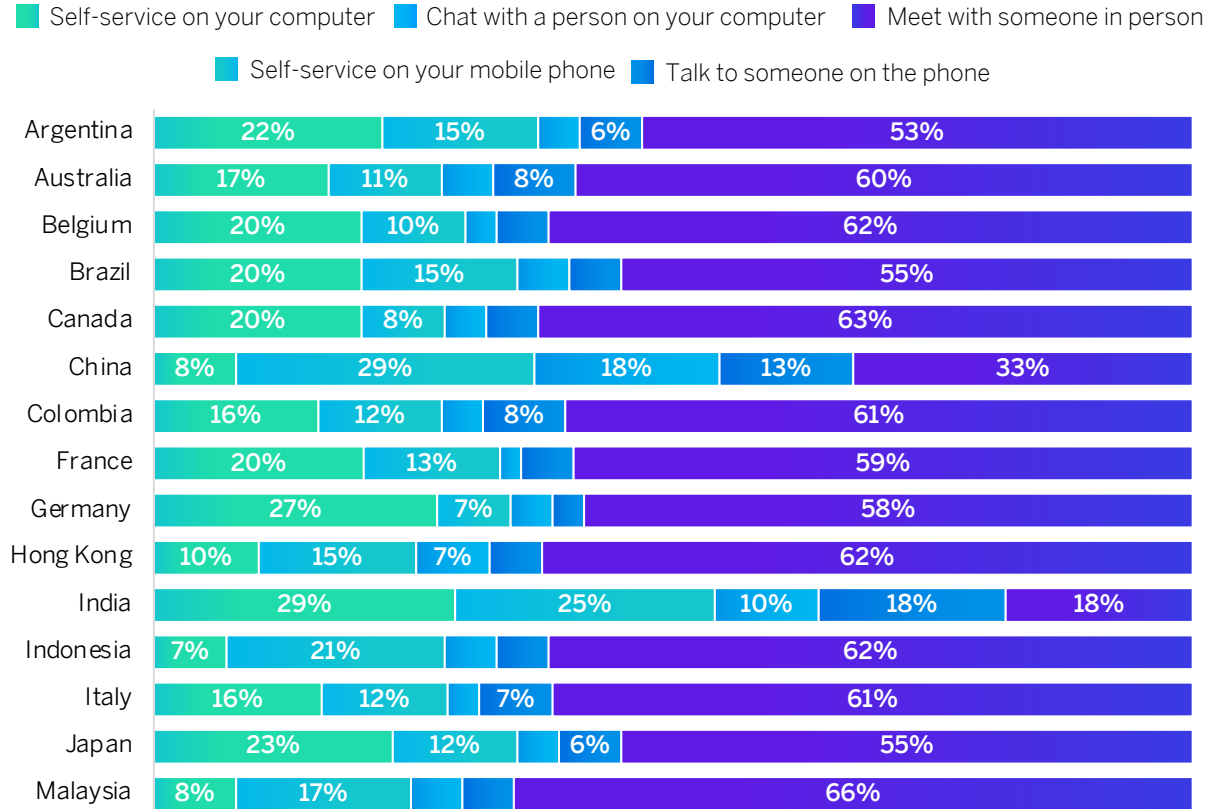**"In which of the following ways would you most prefer to purchase a new TV?"**

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service on computer	Chat with person on computer	Self-service on mobile	Talk to someone on phone	Meet with someone in person
Argentina	22%	15%	6%		53%
Australia	17%	11%	8%		60%
Belgium	20%	10%			62%
Brazil	20%	15%			55%
Canada	20%	8%			63%
China	8%	29%	18%	13%	33%
Colombia	16%	12%	8%		61%
France	20%	13%			59%
Germany	27%	7%			58%
Hong Kong	10%	15%	7%		62%
India	29%	25%	10%	18%	18%
Indonesia	7%	21%			62%
Italy	16%	12%	7%		61%
Japan	23%	12%	6%		55%
Malaysia	8%	17%			66%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
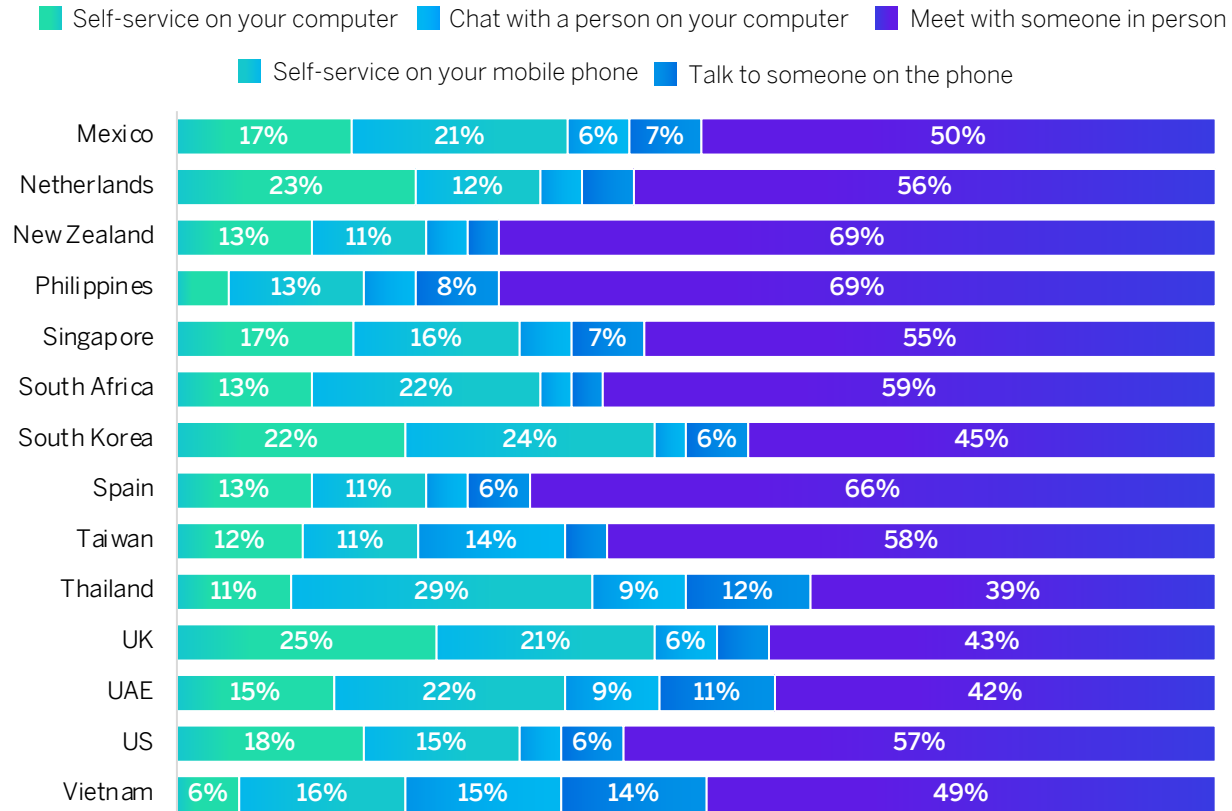
Buy a New TV by Country (Part 2)

KEY TAKEAWAYS

+ Nearly 7 in 10 consumers from New Zealand and the Philippines would prefer to buy a new TV in person, the greatest preference across all countries.

+ Filipino consumers are least likely of all consumers to prefer to use one of three online channels to buy a new TV.

+ After Chinese consumers, Taiwanese consumers have the greatest appetite to purchase new TVs through chat on their computers.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to use to purchase a new TV.

"In which of the following ways would you most prefer to purchase a new TV?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

Country	Self-service computer	Chat with person	Self-service mobile	Talk on phone	Meet in person
Mexico	17%	21%	6%	7%	50%
Netherlands	23%	12%			56%
New Zealand	13%	11%			69%
Philippines		13%		8%	69%
Singapore	17%	16%	7%		55%
South Africa	13%	22%			59%
South Korea	22%	24%	6%		45%
Spain	13%	11%	6%		66%
Taiwan	12%	11%	14%		58%
Thailand	11%	29%	9%	12%	39%
UK	25%	21%	6%		43%
UAE	15%	22%	9%	11%	42%
US	18%	15%	6%		57%
Vietnam	6%	16%	15%	14%	49%

Base: 33,093 consumers from 29 countries
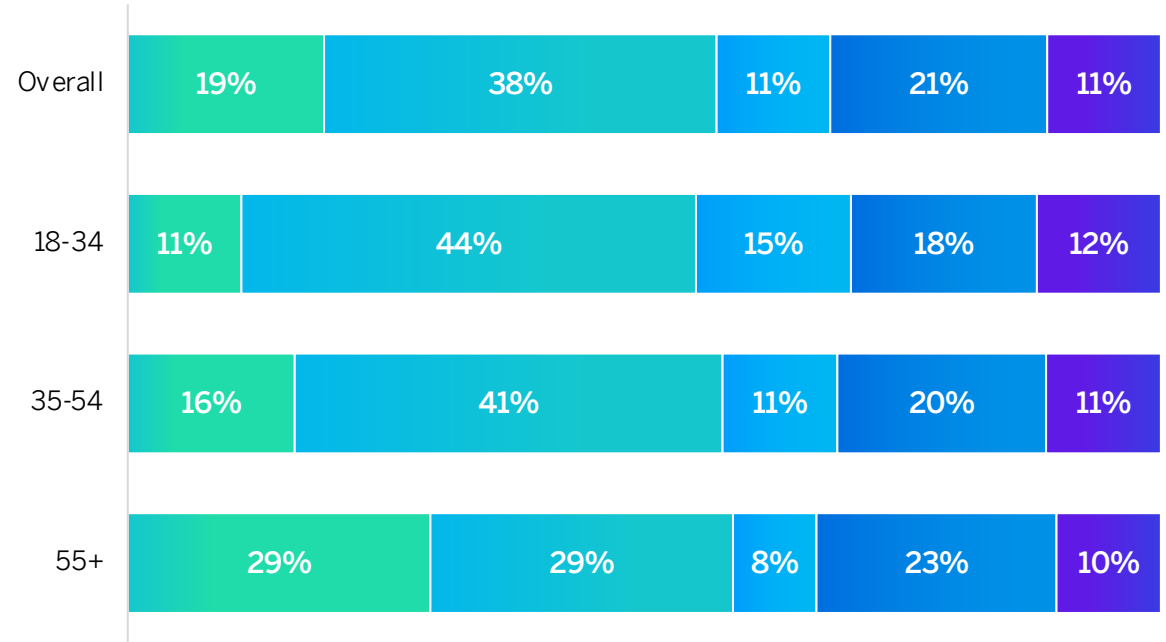Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Get Your Order Status by Age

KEY TAKEAWAYS

+ Sixty-eight percent of consumers prefer to use one of three online channels to check their order status; just 11% would prefer to meet in person to do so. Of all 5 channels, consumers are most likely to use self-serve on their phones.

+ Younger consumers are most likely to use self-service on their phones for this activity.

+ Consumers ages 55 and older have the highest propensity to call to check on their order status.

ABOUT

This chart shows which channels consumers across different age groups would prefer to get status on an order.

"In which of the following ways would you most prefer to get status on an order you made?"

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person
■ Self-service on your mobile phone ■ Talk to someone on the phone

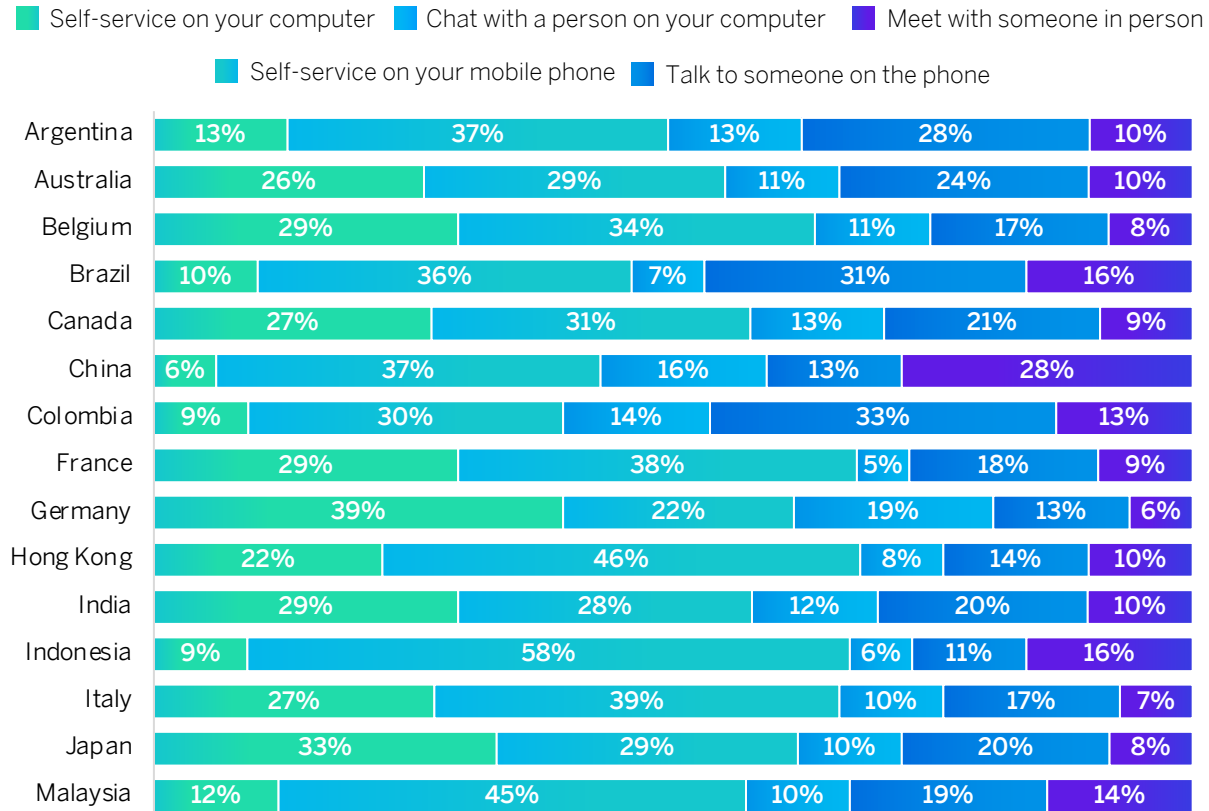|	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Overall	19%	38%	11%	21%	11%
18-34	11%	44%	15%	18%	12%
35-54	16%	41%	11%	20%	11%
55+	29%	29%	8%	23%	10%

Get Your Order Status by Country (Part 1)

KEY TAKEAWAYS

+ Of all consumers surveyed, Chinese consumers are most likely to prefer meeting with someone in person to check on the status of their order, with 28% preferring this channel – 11 points more than the groups with the next highest preference for this channel, Spanish and Vietnamese consumers.

+ Eight in 10 German and Taiwanese consumers prefer to use an online channel to check on their order status. These channels are least likely to be used by Brazilian and Colombian consumers, at 53%.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to get status on an order.

"In which of the following ways would you most prefer to get status on an order you made?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Meet with someone in person	Self-service on your mobile phone	Talk to someone on the phone
Argentina	13%	37%	13%	28%	10%
Australia	26%	29%	11%	24%	10%
Belgium	29%	34%	11%	17%	8%
Brazil	10%	36%	7%	31%	16%
Canada	27%	31%	13%	21%	9%
China	6%	37%	16%	13%	28%
Colombia	9%	30%	14%	33%	13%
France	29%	38%	5%	18%	9%
Germany	39%	22%	19%	13%	6%
Hong Kong	22%	46%	8%	14%	10%
India	29%	28%	12%	20%	10%
Indonesia	9%	58%	6%	11%	16%
Italy	27%	39%	10%	17%	7%
Japan	33%	29%	10%	20%	8%
Malaysia	12%	45%	10%	19%	14%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
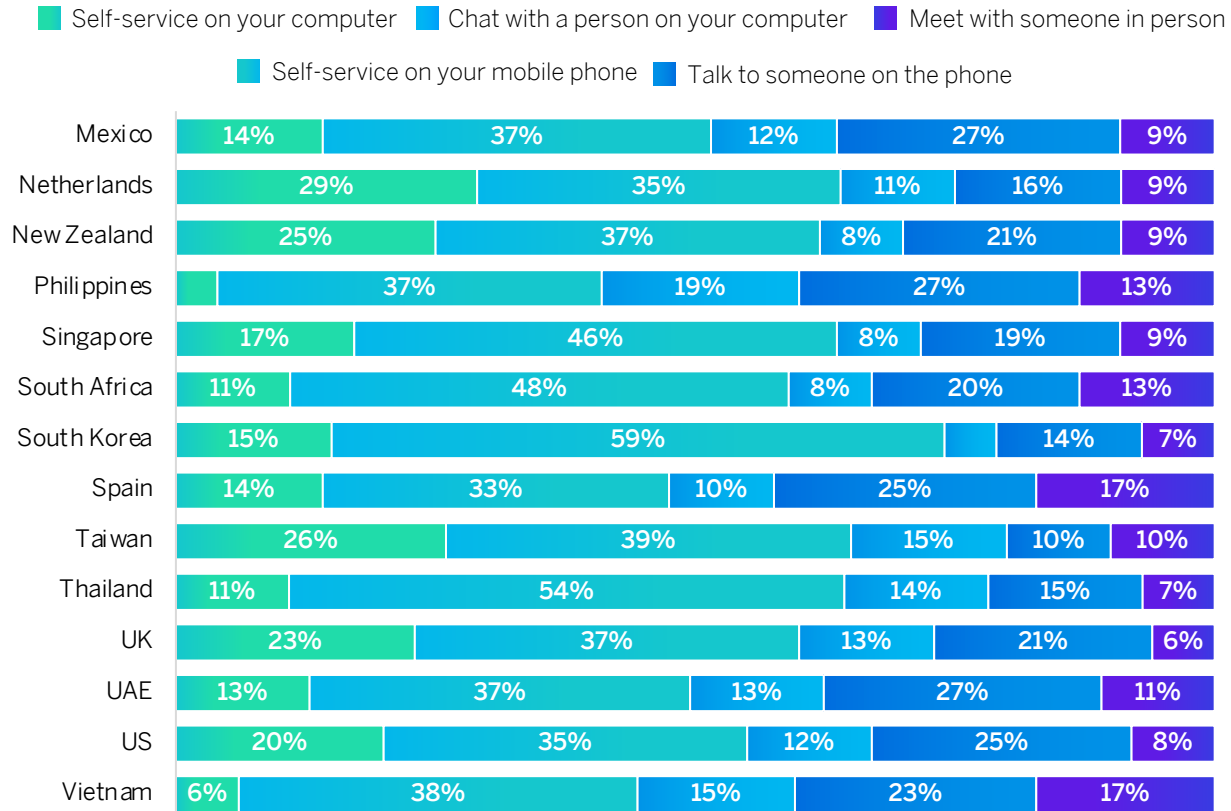
Get Your Order Status by Country (Part 2)

KEY TAKEAWAYS

+ Consumers in Colombia are the most likely of all countries to call to check their order status, at 33%, while Taiwanese consumers prefer this channel least frequently.

+ South Korean consumers most prefer using self-service on their phone, at 59% - the strongest preference across all 14 countries.

+ Filipino consumers least frequently prefer using self-service on a computer for this activity, with just 4% preferring to use this channel.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to get status on an order.

"In which of the following ways would you most prefer to get status on an order you made?"

■ Self-service on your computer   ■ Chat with a person on your computer   ■ Meet with someone in person

■ Self-service on your mobile phone   ■ Talk to someone on the phone

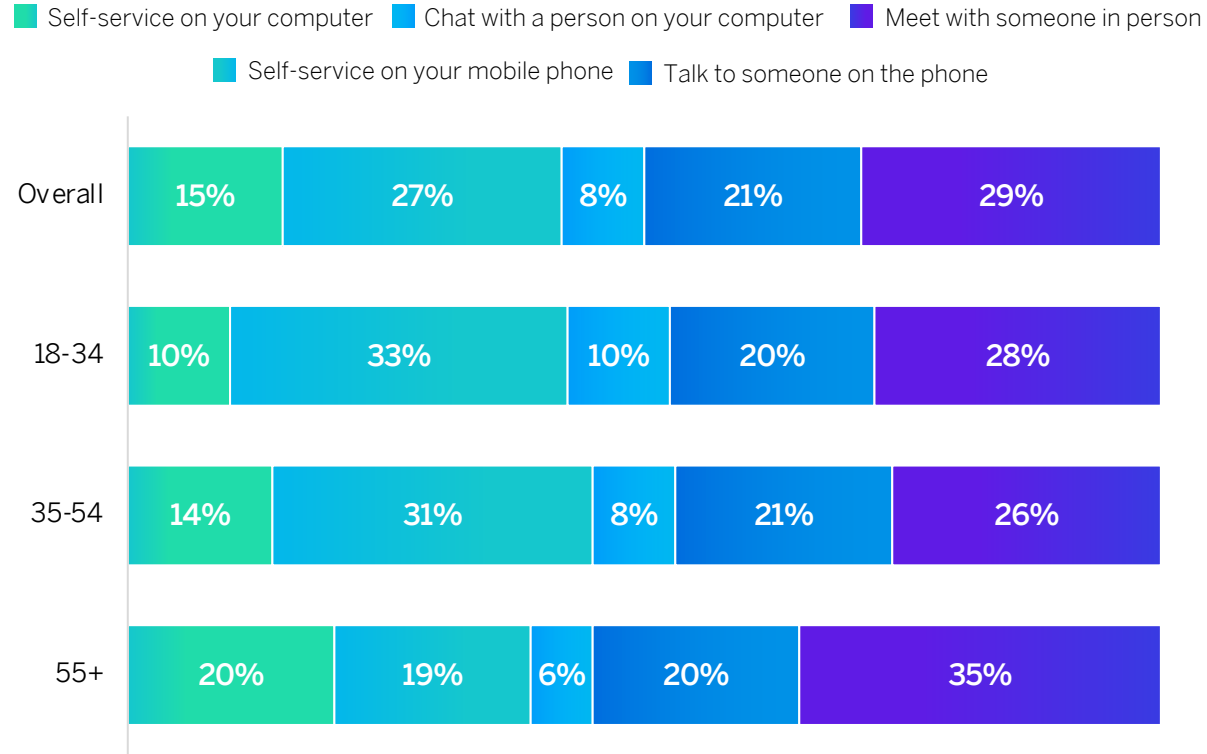| Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Mexico	14%	37%	12%	27%	9%
Netherlands	29%	35%	11%	16%	9%
New Zealand	25%	37%	8%	21%	9%
Philippines		37%	19%	27%	13%
Singapore	17%	46%	8%	19%	9%
South Africa	11%	48%	8%	20%	13%
South Korea	15%	59%		14%	7%
Spain	14%	33%	10%	25%	17%
Taiwan	26%	39%	15%	10%	10%
Thailand	11%	54%	14%	15%	7%
UK	23%	37%	13%	21%	6%
UAE	13%	37%	13%	27%	11%
US	20%	35%	12%	25%	8%
Vietnam	6%	38%	15%	23%	17%

Choose a New Phone Plan by Age

KEY TAKEAWAYS

+ Consumers are split on their preference for online versus offline channels to select a new phone plan.

+ Younger consumers (18-34) are slightly more likely to prefer online channels, while consumers 55 and older have a stronger preference for offline channels to do this activity.

+ Older consumers are 7 or more percentage-points more likely to prefer meeting in person to select a new phone plan than other age groups.

ABOUT

This chart shows which channels consumers across different age groups would prefer to select a new mobile phone plan.

"In which of the following ways would you most prefer to get select a new mobile phone plan?"

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person

■ Self-service on your mobile phone ■ Talk to someone on the phone

Age	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Overall	15%	27%	8%	21%	29%
18-34	10%	33%	10%	20%	28%
35-54	14%	31%	8%	21%	26%
55+	20%	19%	6%	20%	35%

Choose a New Phone Plan by Country (Part 1)

Qualtrics **XM** institute™

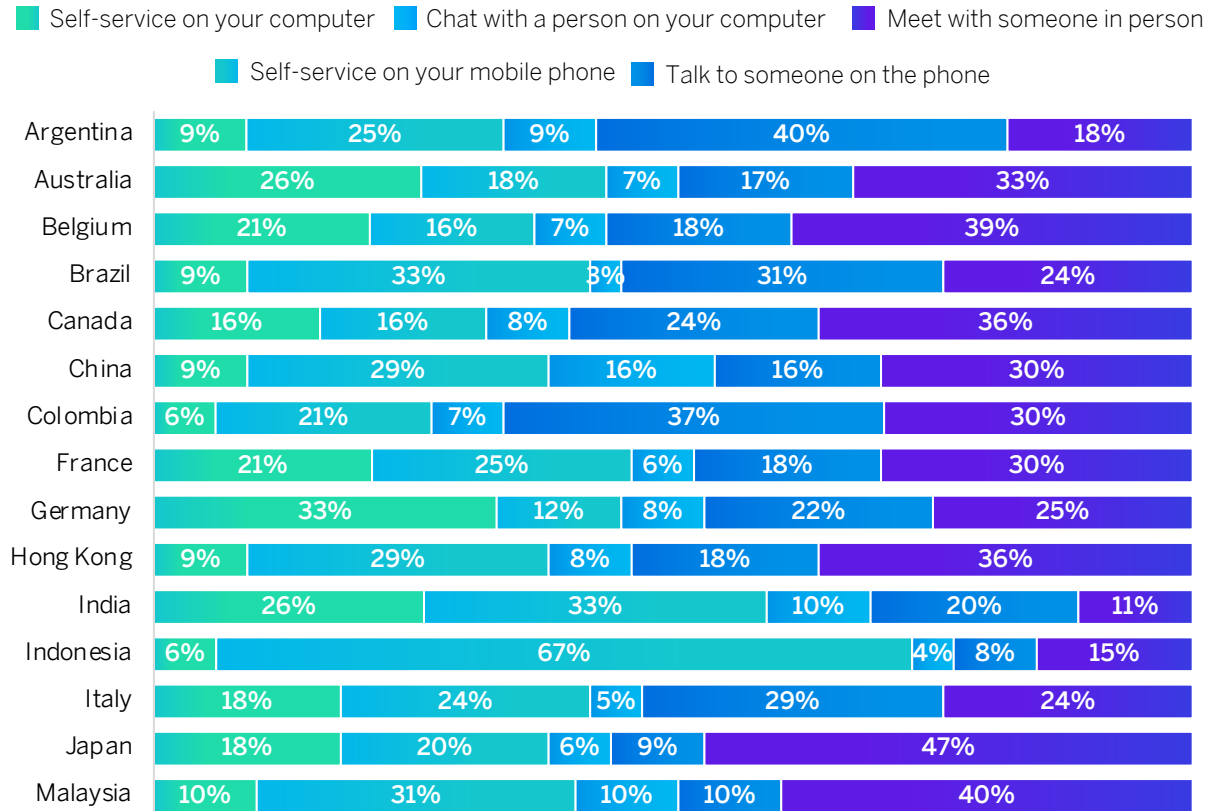## KEY TAKEAWAYS

+ Of all consumers, Indonesian consumers have a very strong preference for choosing phone plans through self-service on their phones, at 67% - a preference 20 %-points stronger than the next group, South Korean consumers.

+ Japanese (47%) and Filipino (43%) prefer the most to meet in person to choose a phone plan, while Indian consumers are least likely to prefer this option (11%).

+ Argentinian and Colombian consumers are most likely of all countries' consumers to call to select a new phone plan.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to select a new mobile phone plan.

"In which of the following ways would you most prefer to get select a new mobile phone plan?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Argentina	9%	25%	9%	40%	18%
Australia	26%	18%	7%	17%	33%
Belgium	21%	16%	7%	18%	39%
Brazil	9%	33%	3%	31%	24%
Canada	16%	16%	8%	24%	36%
China	9%	29%	16%	16%	30%
Colombia	6%	21%	7%	37%	30%
France	21%	25%	6%	18%	30%
Germany	33%	12%	8%	22%	25%
Hong Kong	9%	29%	8%	18%	36%
India	26%	33%	10%	20%	11%
Indonesia	6%	67%	4%	8%	15%
Italy	18%	24%	5%	29%	24%
Japan	18%	20%	6%	9%	47%
Malaysia	10%	31%	10%	10%	40%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Choose a Phone Plan by Country (Part 2)

Qualtrics
XM institute™

KEY TAKEAWAYS

+ Vietnamese consumers least frequently of all consumers prefer to use self-service on a computer to choose a new phone plan, with just 5% selecting this option.

+ After Colombian consumers, Spanish consumers are least likely of all 29 countries to prefer using an online channel to choose a phone plan.

+ The two self-service channels are most popular for this activity among Indonesian consumers (73%), followed by South Korean consumers (59%).

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to select a new mobile phone plan.

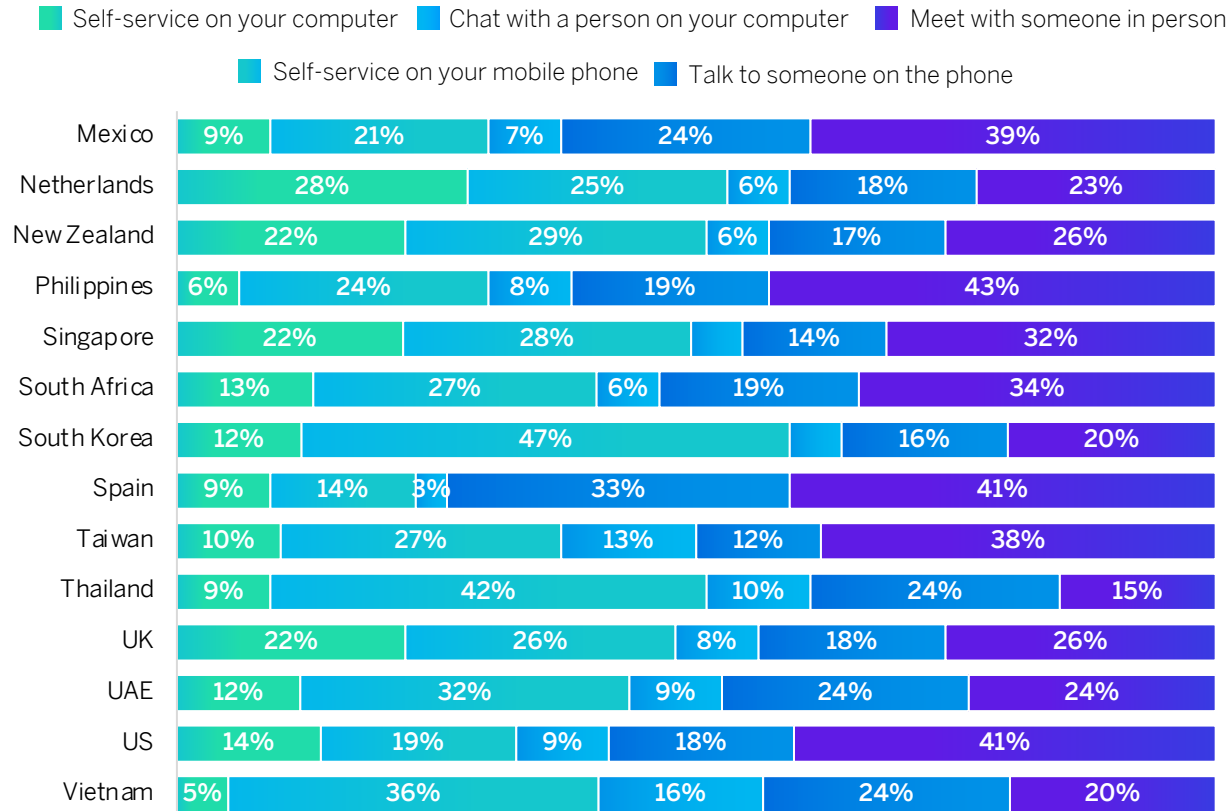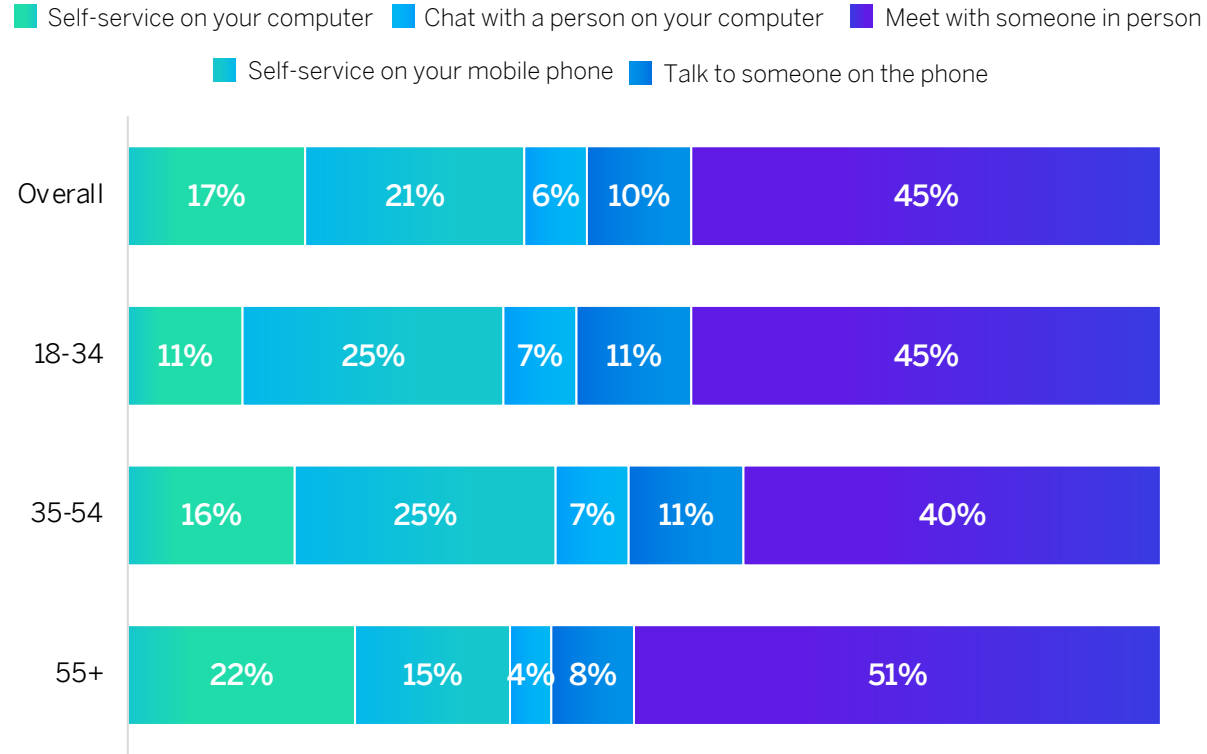### "In which of the following ways would you most prefer to get select a new mobile phone plan?"

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person
■ Self-service on your mobile phone ■ Talk to someone on the phone

Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Mexico	9%	21%	7%	24%	39%
Netherlands	28%	25%	6%	18%	23%
New Zealand	22%	29%	6%	17%	26%
Philippines	6%	24%	8%	19%	43%
Singapore	22%	28%	14%		32%
South Africa	13%	27%	6%	19%	34%
South Korea	12%	47%	16%		20%
Spain	9%	14%	3%	33%	41%
Taiwan	10%	27%	13%	12%	38%
Thailand	9%	42%	10%	24%	15%
UK	22%	26%	8%	18%	26%
UAE	12%	32%	9%	24%	24%
US	14%	19%	9%	18%	41%
Vietnam	5%	36%	16%	24%	20%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Apply for a Bank Account by Age

KEY TAKEAWAYS

+ Consumers have a slight preference to use one of two offline channels to apply for new bank accounts.

+ Just over half of consumers aged 55 or older would prefer to meet in person to apply for a new bank account. Consumers ages 35-54 are least likely to prefer this option, at 40%.

+ Consumers aged 35-54 are the most comfortable with self-service channels, but still prefer to interact with another person to apply for a bank account.

ABOUT

This chart shows which channels consumers across different age groups would prefer to apply for a new bank account.

"In which of the following ways would you most prefer to apply for a new bank account?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Age	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Overall	17%	21%	6%	10%	45%
18-34	11%	25%	7%	11%	45%
35-54	16%	25%	7%	11%	40%
55+	22%	15%	4%	8%	51%

Apply for a Bank Account by Country (Part 1)

Qualtrics **XM** institute™

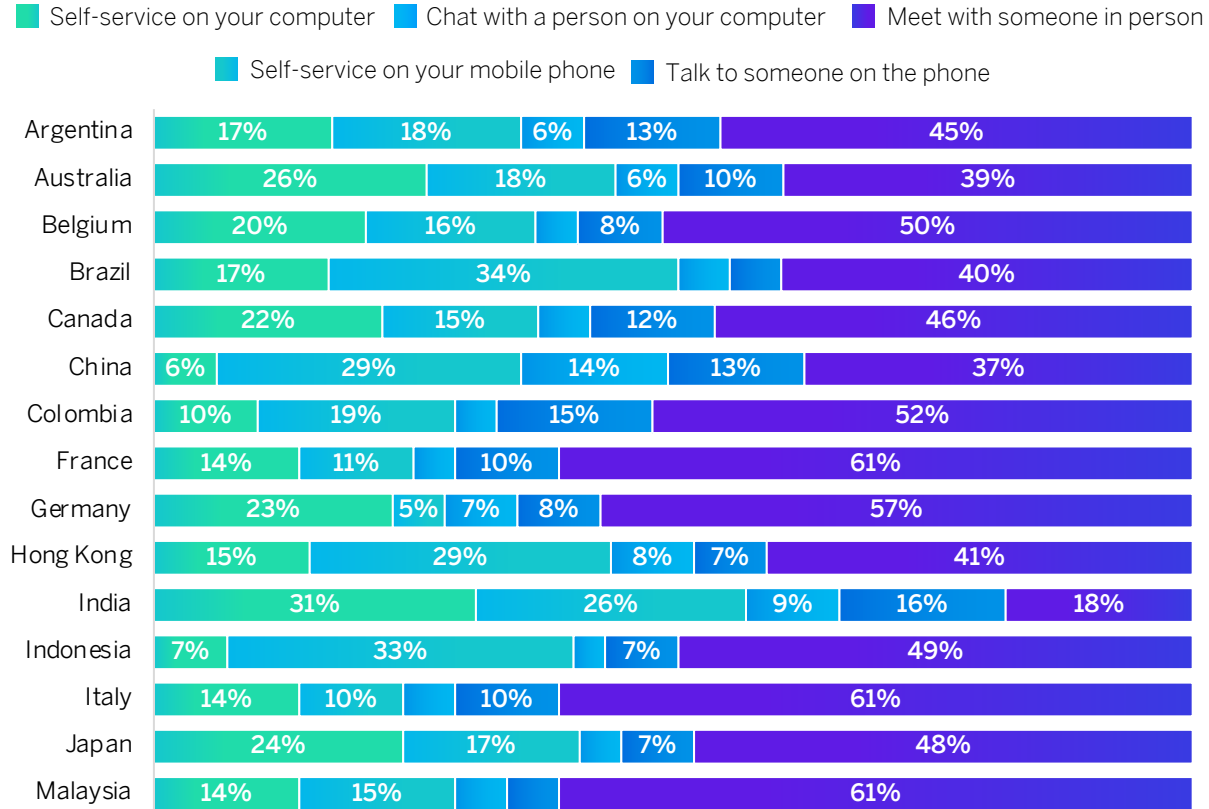## KEY TAKEAWAYS

+ After South Koreans, Brazilian consumers are most likely to prefer using self-service on a mobile device to apply for a new bank account.

+ Indian consumers are least likely of all consumers to prefer to meet with someone in person to apply for a new bank account, with just 18% preferring this option.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to apply for a new bank account.

"In which of the following ways would you most prefer to apply for a new bank account?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

| Country	Self-service on computer	Chat with a person on computer	Self-service on mobile phone	Talk to someone on the phone	Meet with someone in person
Argentina	17%	18%	6%	13%	45%
Australia	26%	18%	6%	10%	39%
Belgium	20%	16%		8%	50%
Brazil	17%	34%			40%
Canada	22%	15%		12%	46%
China	6%	29%	14%	13%	37%
Colombia	10%	19%		15%	52%
France	14%	11%		10%	61%
Germany	23%	5%	7%	8%	57%
Hong Kong	15%	29%	8%	7%	41%
India	31%	26%	9%	16%	18%
Indonesia	7%	33%		7%	49%
Italy	14%	10%		10%	61%
Japan	24%	17%		7%	48%
Malaysia	14%	15%			61%

Apply for a Bank Account by Country (Part 2)

KEY TAKEAWAYS

+ Of all countries, Spanish and Mexican consumers least prefer using online channels to apply for a new bank account, at 27% and 28%, respectively.

+ South Korean consumers most prefer using self-service on their mobile phones to apply for a bank account. No other country most prefers this channel for this activity.
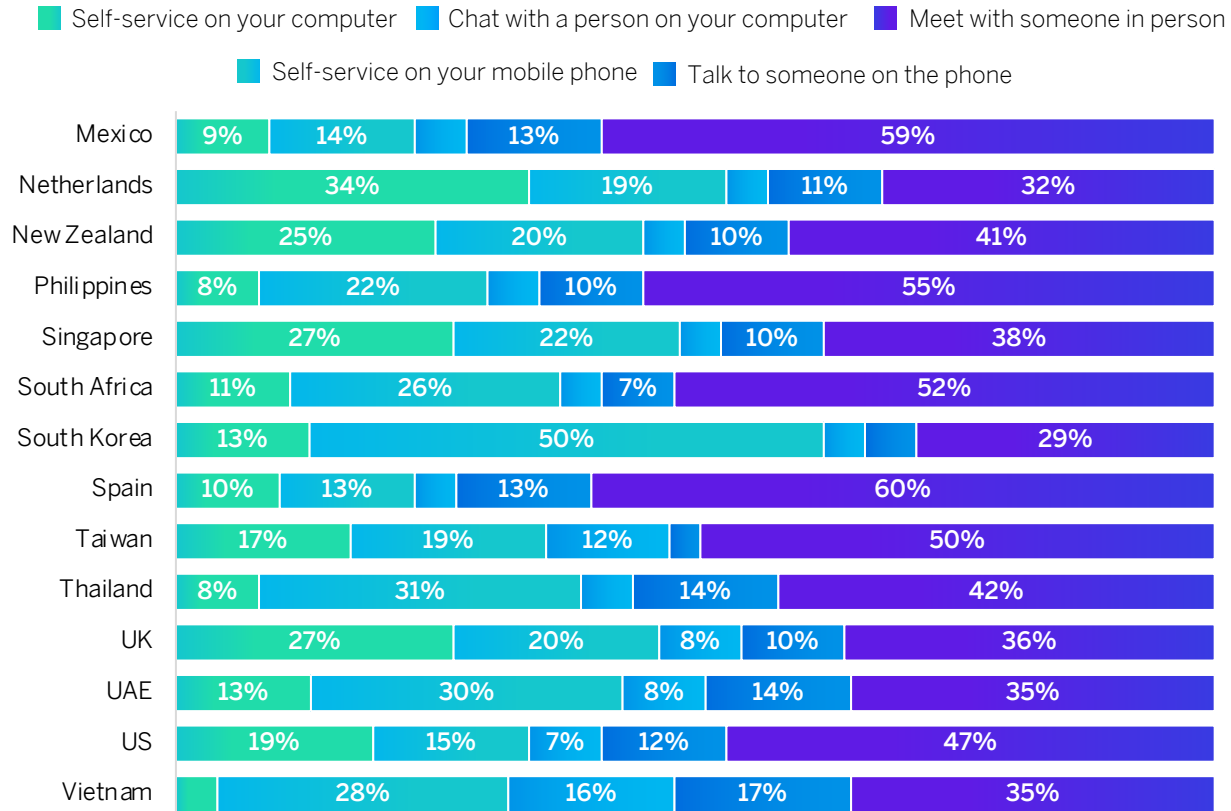
ABOUT

This chart shows which channels consumers from 14 different countries would prefer to use to apply for a new bank account.

"In which of the following ways would you most prefer to apply for a new bank account?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

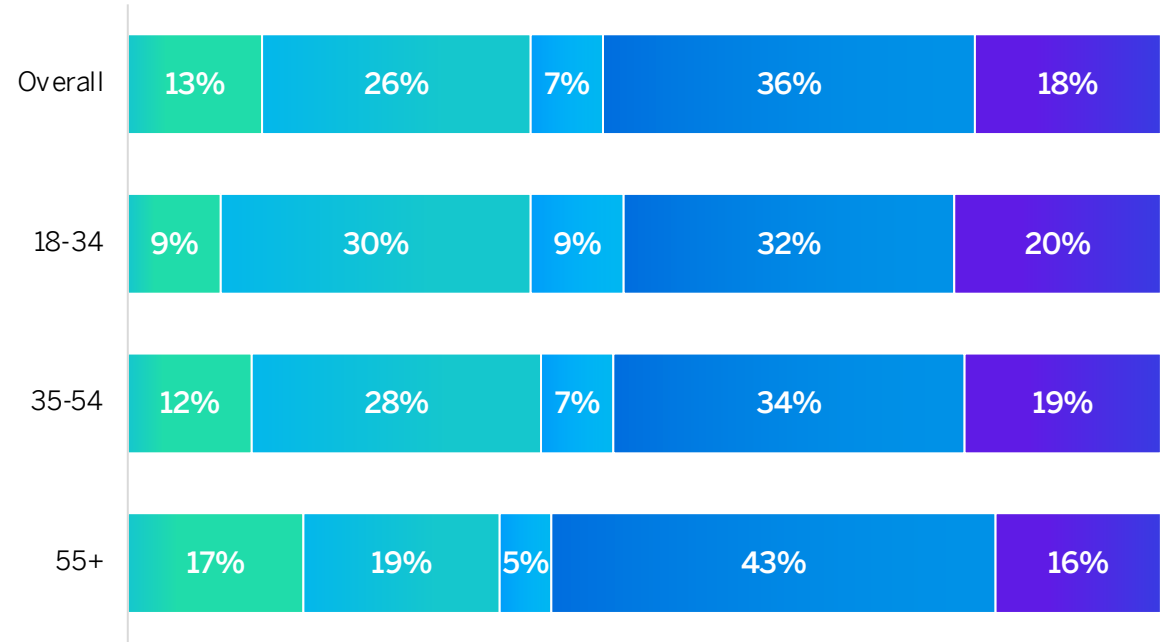| Country	Self-service on computer	Chat with person on computer	Self-service on mobile	Talk to someone on phone	Meet with someone in person
Mexico	9%	14%	13%		59%
Netherlands	34%	19%	11%		32%
New Zealand	25%	20%	10%		41%
Philippines	8%	22%	10%		55%
Singapore	27%	22%	10%		38%
South Africa	11%	26%	7%		52%
South Korea	13%	50%			29%
Spain	10%	13%	13%		60%
Taiwan	17%	19%	12%		50%
Thailand	8%	31%	14%		42%
UK	27%	20%	8%	10%	36%
UAE	13%	30%	8%	14%	35%
US	19%	15%	7%	12%	47%
Vietnam		28%	16%	17%	35%

Schedule a Medical Appointment by Age

KEY TAKEAWAYS

+ Of these five channels, consumers have the strongest preference to talk on the phone to schedule a medical appointment (36%). Consumers 55 and older most prefer this channel.

+ Slightly more than one-third of older consumers would prefer to use a self-service channel to schedule a medical appointment, while 2 in 5 of consumers overall would prefer these channels.

ABOUT

This chart shows which channels consumers across different age groups would prefer to schedule a medical appointment.

"In which of the following ways would you most prefer to schedule a medical appointment?"

■ Self-service on your computer ■ Chat with a person on your computer ■ Meet with someone in person
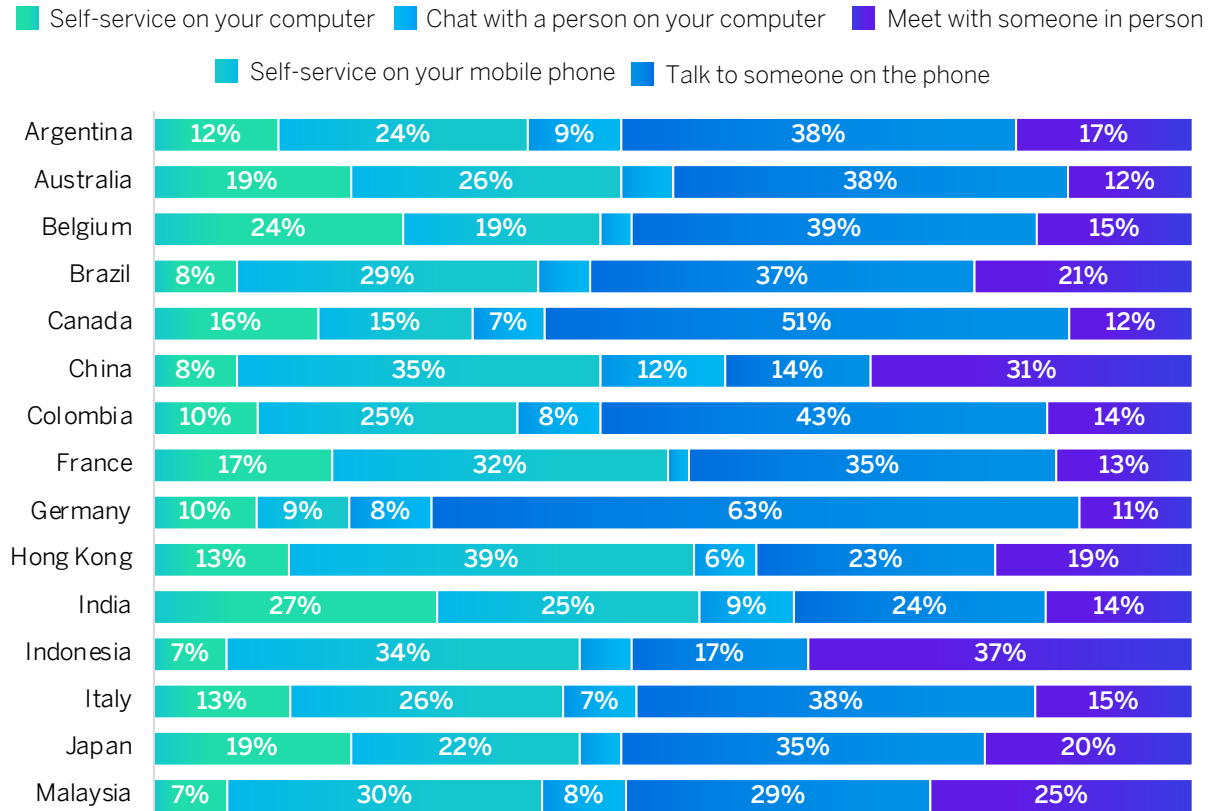■ Self-service on your mobile phone ■ Talk to someone on the phone

Age	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Overall	13%	26%	7%	36%	18%
18-34	9%	30%	9%	32%	20%
35-54	12%	28%	7%	34%	19%
55+	17%	19%	5%	43%	16%

Schedule a Medical Appointment by Country (Part 1)

KEY TAKEAWAYS

+ Indonesian consumers have the strongest preference, of all countries, to schedule medical appointments by meeting with someone in person. US consumers least prefer this channel for this activity.

+ German consumers most prefer to call on the phone to schedule a medical appointment, and least prefer across all 29 countries to use online channels for this activity.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to schedule a medical appointment.

"In which of the following ways would you most prefer to schedule a medical appointment?"

Legend:
- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

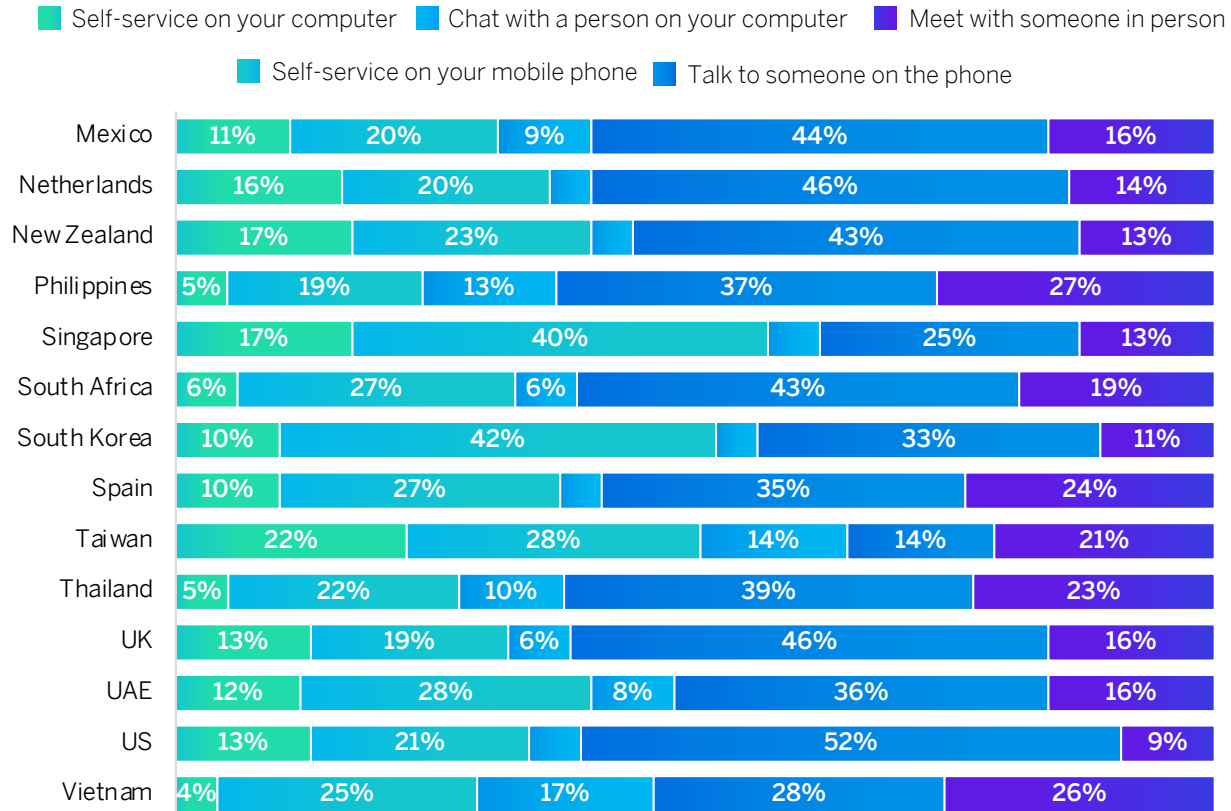| Country	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Argentina	12%	24%	9%	38%	17%
Australia	19%	26%		38%	12%
Belgium	24%	19%		39%	15%
Brazil	8%	29%		37%	21%
Canada	16%	15%	7%	51%	12%
China	8%	35%	12%	14%	31%
Colombia	10%	25%	8%	43%	14%
France	17%	32%		35%	13%
Germany	10%	9%	8%	63%	11%
Hong Kong	13%	39%	6%	23%	19%
India	27%	25%	9%	24%	14%
Indonesia	7%	34%	17%		37%
Italy	13%	26%	7%	38%	15%
Japan	19%	22%		35%	20%
Malaysia	7%	30%	8%	29%	25%

Schedule a Medical Appointment by Country (Part 2)

KEY TAKEAWAYS

+ Taiwanese and Singaporean consumers have the strongest preference to use online channels to schedule medical appointments.

+ US consumers most prefer to talk on the phone to schedule an appointment (52%), the second-strongest preference for this channel across all 29 countries, after Germans.

+ South Korean consumers have the highest propensity, across all 29 countries, to schedule an appointment through mobile self-service.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to schedule a medical appointment.

"In which of the following ways would you most prefer to schedule a medical appointment?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

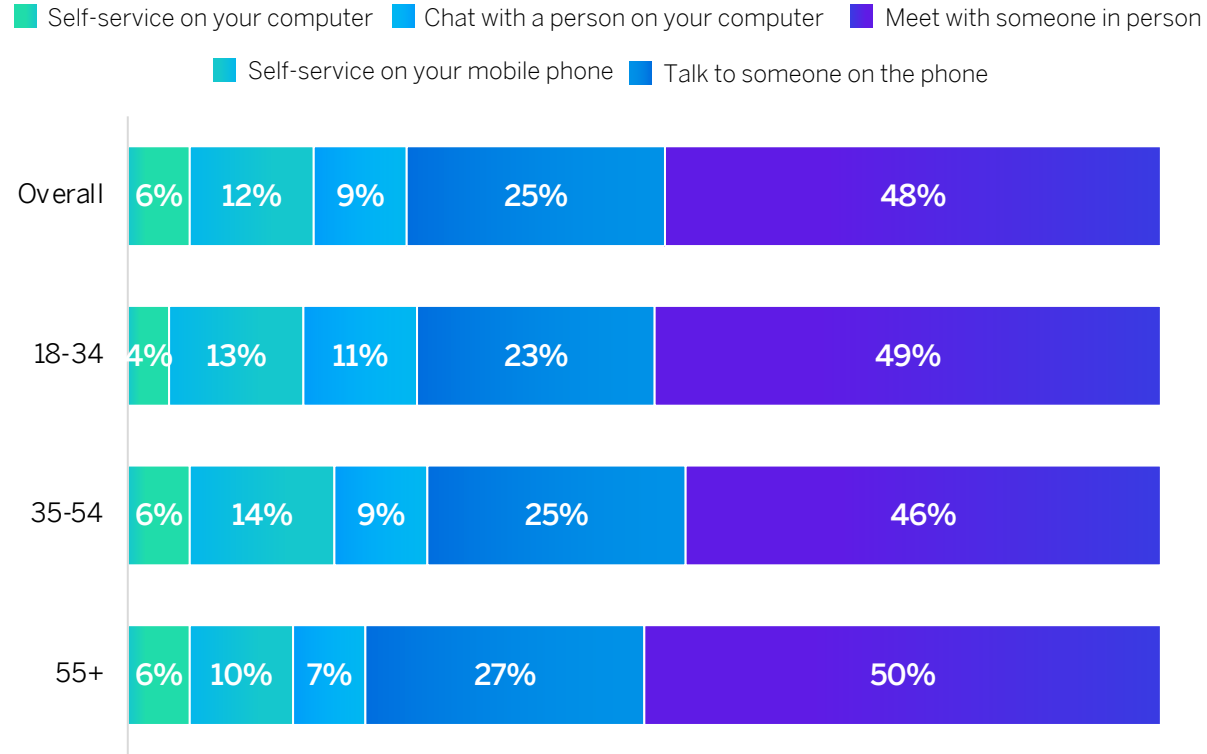| Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Mexico	11%	20%	9%	44%	16%
Netherlands	16%	20%		46%	14%
New Zealand	17%	23%		43%	13%
Philippines	5%	19%	13%	37%	27%
Singapore	17%	40%		25%	13%
South Africa	6%	27%	6%	43%	19%
South Korea	10%	42%		33%	11%
Spain	10%	27%		35%	24%
Taiwan	22%	28%	14%	14%	21%
Thailand	5%	22%	10%	39%	23%
UK	13%	19%	6%	46%	16%
UAE	12%	28%	8%	36%	16%
US	13%	21%		52%	9%
Vietnam	4%	25%	17%	28%	26%

Receive Medical Advice by Age

KEY TAKEAWAYS

+ Nearly half of consumers would prefer to receive medical advice about a minor issue in person; just 27% would prefer to receive this advice through an online channel.

+ Younger consumers have the strongest propensity to receive medical advice through a chat on their computer, at 11%.

+ Consumers ages 35-54 have the weakest preference for receiving in-person and offline advice; still, less than 3 in 10 of these consumers would prefer to use online channels for this activity.

ABOUT

This chart shows which channels consumers across different age groups would prefer to receive advice from a nurse/doctor about a minor issue.

"In which of the following ways would you most prefer to receive advice from a nurse/doctor about a minor issue?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

	Self-service on your computer	Chat with a person on your computer	Self-service on your mobile phone	Talk to someone on the phone	Meet with someone in person
Overall	6%	12%	9%	25%	48%
18-34	4%	13%	11%	23%	49%
35-54	6%	14%	9%	25%	46%
55+	6%	10%	7%	27%	50%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
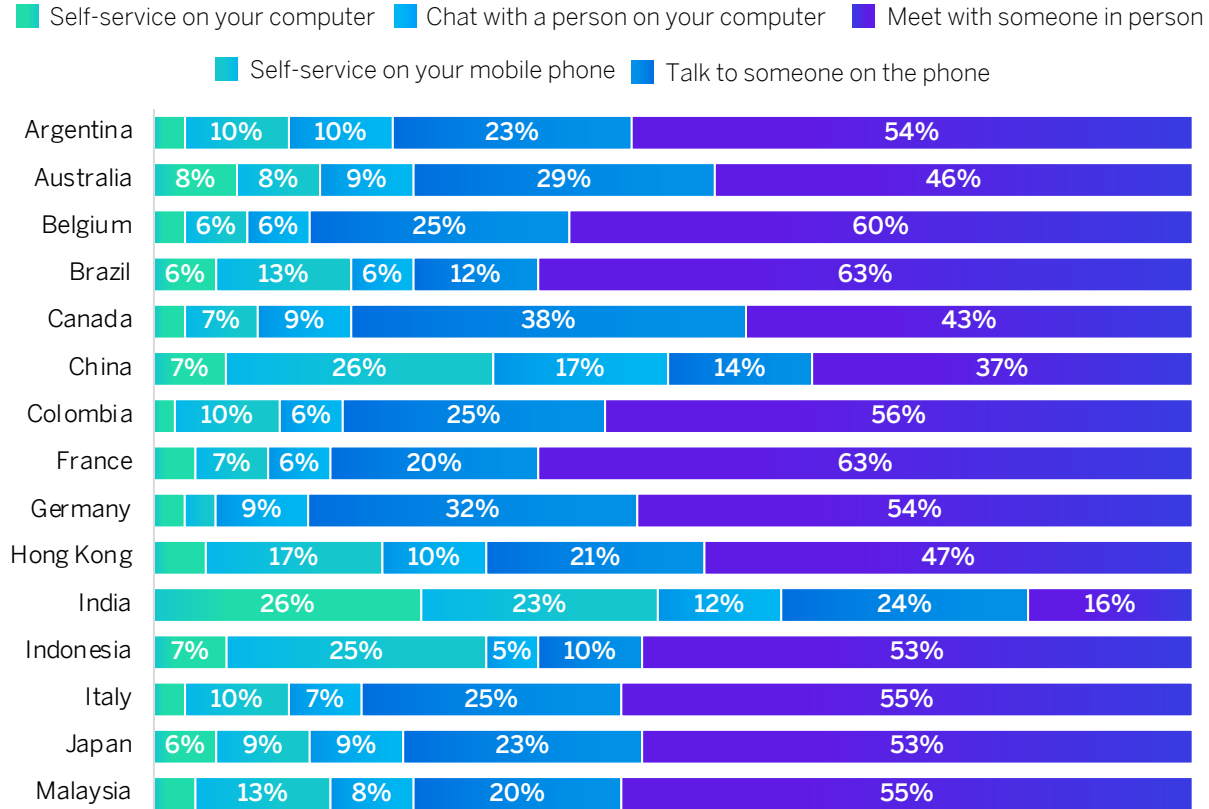
Receive Medical Advice by Country (Part 1)

KEY TAKEAWAYS

+ Brazilian and French consumers have the strongest preference of all 29 countries to receive medical advice from a nurse or doctor in person, at 63%. Indian consumers have the weakest preference for this channel, at just 16%.

+ Indian and Chinese consumers are most likely of all consumers to say they would prefer to get medical advice through one of two self-service channels.

+ Canadian consumers have the highest propensity to prefer to receive medical advice over the phone, compared to all 28 other countries. Indonesians are the least likely to choose this channel.

ABOUT

This chart shows which channels consumers from 15 different countries would prefer to receive advice from a nurse/doctor about a minor issue.

"In which of the following ways would you most prefer to receive advice from a nurse/doctor about a minor issue?"

- ■ Self-service on your computer
- ■ Chat with a person on your computer
- ■ Meet with someone in person
- ■ Self-service on your mobile phone
- ■ Talk to someone on the phone

Country	Self-service computer	Self-service mobile	Chat with person	Talk on phone	Meet in person
Argentina		10%	10%	23%	54%
Australia	8%	8%	9%	29%	46%
Belgium	6%	6%	25%		60%
Brazil	6%	13%	6%	12%	63%
Canada		7%	9%	38%	43%
China	7%	26%	17%	14%	37%
Colombia		10%	6%	25%	56%
France		7%	6%	20%	63%
Germany			9%	32%	54%
Hong Kong		17%	10%	21%	47%
India	26%	23%	12%	24%	16%
Indonesia	7%	25%	5%	10%	53%
Italy		10%	7%	25%	55%
Japan	6%	9%	9%	23%	53%
Malaysia		13%	8%	20%	55%

Base: 33,093 consumers from 29 countries
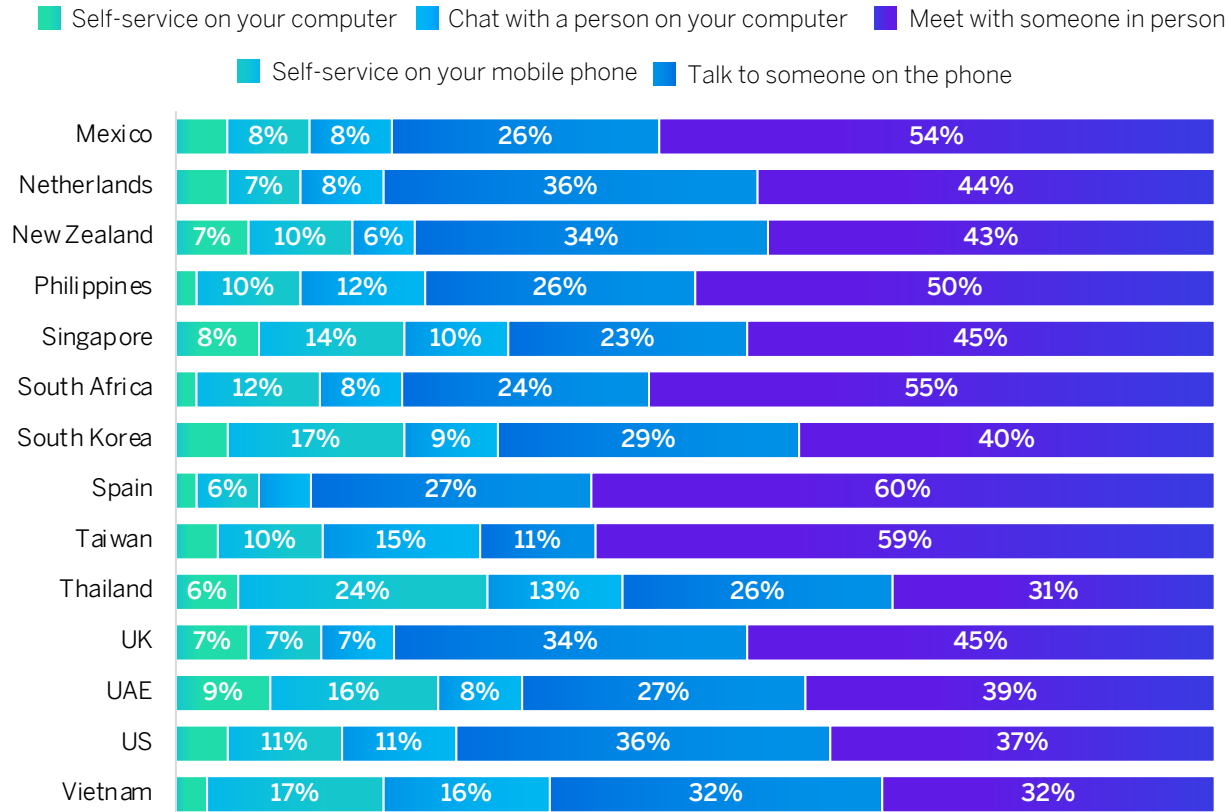Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Receive Medical Advice by Country (Part 2)

KEY TAKEAWAYS

+ Spanish consumers least frequently prefer online channels for receiving medical advice about minor issues, at 13%, followed by German and Belgian consumers, at 15%

+ Sixteen percent of Vietnamese consumers would prefer to get their medical advice through chat on a computer, the greatest preference for this channel of all consumers.

ABOUT

This chart shows which channels consumers from 14 different countries would prefer to receive advice from a nurse/doctor about a minor issue.

"In which of the following ways would you most prefer to receive advice from a nurse/doctor about a minor issue?"

- Self-service on your computer
- Chat with a person on your computer
- Meet with someone in person
- Self-service on your mobile phone
- Talk to someone on the phone

Country	Self-service on your computer	Self-service on your mobile phone	Chat with a person on your computer	Talk to someone on the phone	Meet with someone in person
Mexico		8%	8%	26%	54%
Netherlands		7%	8%	36%	44%
New Zealand	7%	10%	6%	34%	43%
Philippines		10%	12%	26%	50%
Singapore	8%	14%	10%	23%	45%
South Africa		12%	8%	24%	55%
South Korea		17%	9%	29%	40%
Spain		6%	27%		60%
Taiwan		10%	15%	11%	59%
Thailand	6%	24%	13%	26%	31%
UK	7%	7%	7%	34%	45%
UAE	9%	16%	8%	27%	39%
US		11%	11%	36%	37%
Vietnam		17%	16%	32%	32%

Base: 33,093 consumers from 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Methodology

DATA CALCULATION

Each figure was calculated by dividing the number of respondents who selected each channel per age group, country, or across all consumers by the total number of respondents in the respective age group, country, or overall, for the titled question.

In **Figure 1-3**, the percentages are calculated by taking the average across all nine interactions for each age group or country, and for the overall average.

In **Figure 4-30**, the percentages are calculated by dividing the number of respondents per age group or country selecting each channel preference by the total number of respondents in that age group or country.

References to "self-service" channels include the following channels: self-service on your computer, self-service on your mobile phone.

References to "offline" channels include the following channels: talk to someone on the phone, meet with someone in person.

AUTHORS
Moira Dorsey, XMP – Principal XM Catalyst
Talia Quaadgras – Senior Research Associate
Julia Chang – Senior Research Associate