



DATA SNAPSHOT

The Humanized Digital Experience Ratings

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of Qualtrics XM Institute's annual US consumer study, we asked 10,000 consumers to evaluate their recent digital experiences. Consumers shared whether they had a digital interaction within the previous 30 days with any of 10 industries. They shared which access method they used – mobile website, computer website, or mobile app – and then rated that experience across five components of a humanized digital experience: *understandable*, *confidence-building*, *personalized*, *navigable*, and *human*. From our analysis, we found that:

- + **Mobile apps deliver the best digital experiences.** Across all industries, consumers gave the highest composite Humanized Digital Experience rating to mobile apps, with an average of 80%. In fact, mobile apps received the highest composite rating in every single industry, with the greatest gap (11 percentage points) between mobile app and computer/mobile website experiences with the federal government.
- + **Organizations struggle to create digital experiences that provide humanity and personalization.** When evaluating their digital experiences, across all industries and access methods, consumers were least likely to agree that *the organization treated me like a human being* (71%) and *the experience was personalized to my needs* (73%).
- + **The Food Takeout/Delivery and Retail industries provide the most consistent digital experiences.** Across all ten industries surveyed, the food takeout/delivery and retail industries have the smallest gaps between the experiences delivered across the three access methods, at just 3 and 4 percentage points, respectively. Consumers also least frequently reported problems with their digital retail experience, at a rate of just 7%.
- + **Users report the worst experience with mobile websites.** Of the three access methods, users gave the lowest Humanized Digital Experience ratings to mobile websites (73%). They also reported experiencing problems most frequently with this access method (17%), and just 46% agreed that *it was easy to access the support [they] needed to resolve that problem*.

STUDY KEY FACTS

- 10,000 US consumers
- Online panel study
- Conducted in Q3 of 2023
- 10 industries
- 3 digital access methods

The Humanized Digital Experience Ratings

STUDY OVERVIEW

The data for this report comes from a U.S. consumer study that Qualtrics XM Institute conducted in the third quarter of 2023. Using an online survey, XM Institute collected data from 10,000 consumers within the United States of America. To ensure that the data was reflective of the population within those countries, we set quotas for responses to match the gender, age, ethnicity, geographical region, and income according to the latest available U.S. Census.

FIGURES IN THE REPORT

1. 5 Components of a Humanized Digital Experience
2. Humanized Digital Experience: by Industry and Access Method
3. Humanized Digital Experience: by Component
4. Humanized Digital Experience: Banking
5. Humanized Digital Experience: Retail
6. Humanized Digital Experience: Health Insurance
7. Humanized Digital Experience: Fast Food
8. Humanized Digital Experience: Streaming Media
9. Humanized Digital Experience: Airline
10. Humanized Digital Experience: Food Takeout & Delivery
11. Humanized Digital Experience: Grocery
12. Humanized Digital Experience: Rideshare
13. Humanized Digital Experience: Federal Government
14. Digital Experience Problem Rates

Methodology

5 Components of a Humanized Digital Experience

The Humanized Digital Experience Rating is Based on Five Components of a Digital Experience

UNDERSTANDABLE

It was easy to understand the information provided.

CONFIDENCE-BUILDING

I felt confident that I was on the right track throughout the interaction.

PERSONALIZED

The experience was personalized to my needs.

NAVIGABLE

There was an immediate and obvious pathway for me to complete my goal.

HUMAN

The organization treated me like a human being.

Consumers rated each component statement according to the following 5-point scale:

1 Strongly disagree **2** Somewhat disagree **3** Neither agree nor disagree **4** Somewhat agree **5** Strongly agree

% Somewhat agree + % Strongly agree = Component Rating

HUMANIZED DIGITAL EXPERIENCE COMPOSITE RATING:

$(\% \text{ Understandable} + \% \text{ Confidence-Building} + \% \text{ Personalized} + \% \text{ Navigable} + \% \text{ Human}) \div 5 =$
Humanized Digital Experience Composite Rating

Humanized Digital Experience: by Industry and Access Method

KEY TAKEAWAYS

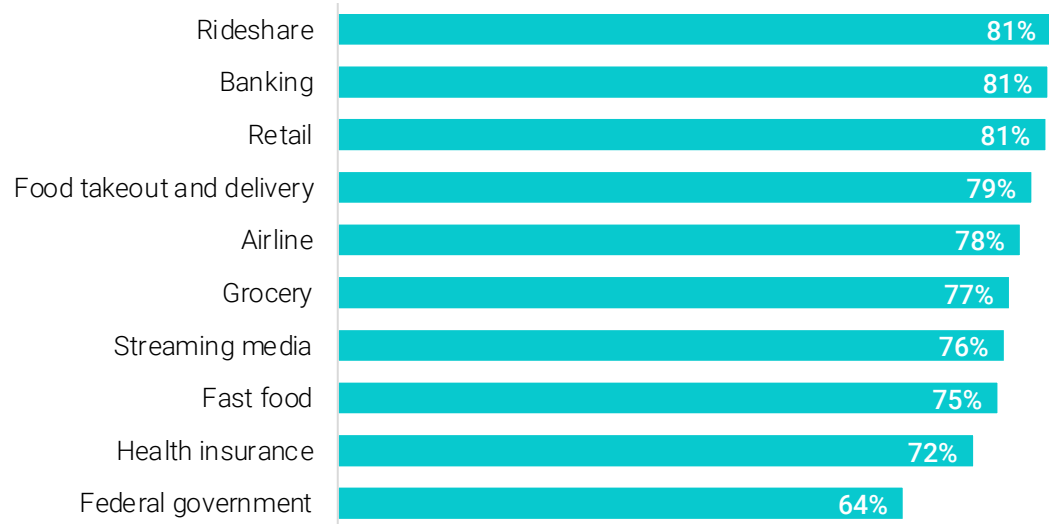
- + Digital rideshare, banking, and retail experiences received the highest composite ratings (81%) across the ten industries surveyed, while digital experiences with the federal government received the lowest rating (64%).
- + Consumers rated their digital experiences through organizations' mobile apps most highly, at 80%. Mobile website digital experiences ranked lowest, at 73%.

ABOUT

These charts show the Humanized Digital Composite Rating for each industry/access method.

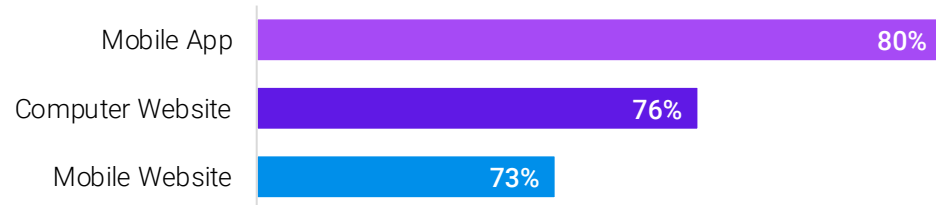
How Consumers Rate their Digital Experience for Humanization: by Industry

(Humanized Digital Experience Composite Rating)



How Consumers Rate their Digital Experience for Humanization: by Access Method

(Humanized Digital Experience Composite Rating)



Humanized Digital Experience: by Component

KEY TAKEAWAYS

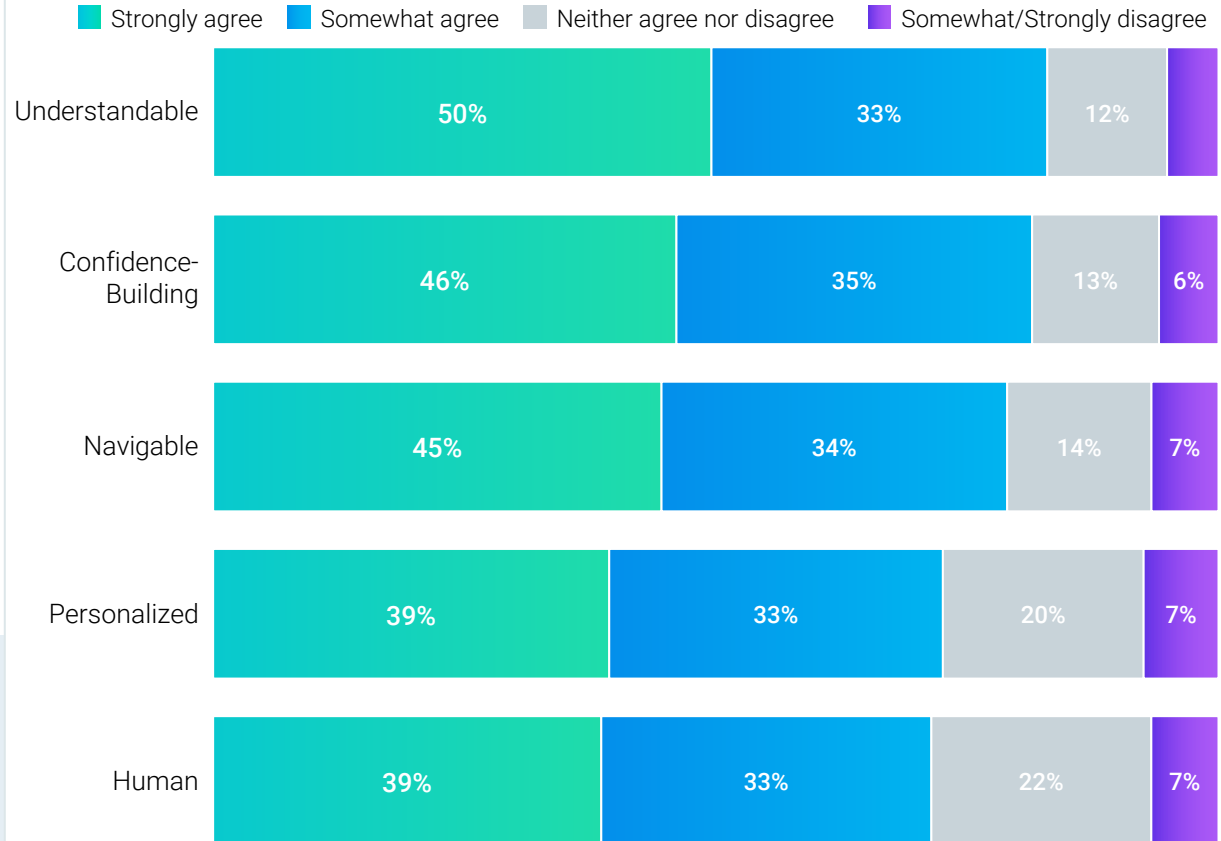
- + Across all industries and access methods, 83% of digital consumers agreed that *it was easy to understand the information provided*, the highest rating of the five components.
- + Digital consumers had the least propensity to agree that *the organization treated [them] like a human being* (71%), followed by the *Personalized* component at 73%.

ABOUT

This chart show how consumers rated each component across all industries/access methods.

Humanized Digital Experience Composite Ratings: by Component

(Aggregate across all industries)



Humanized Digital Experience: Banking

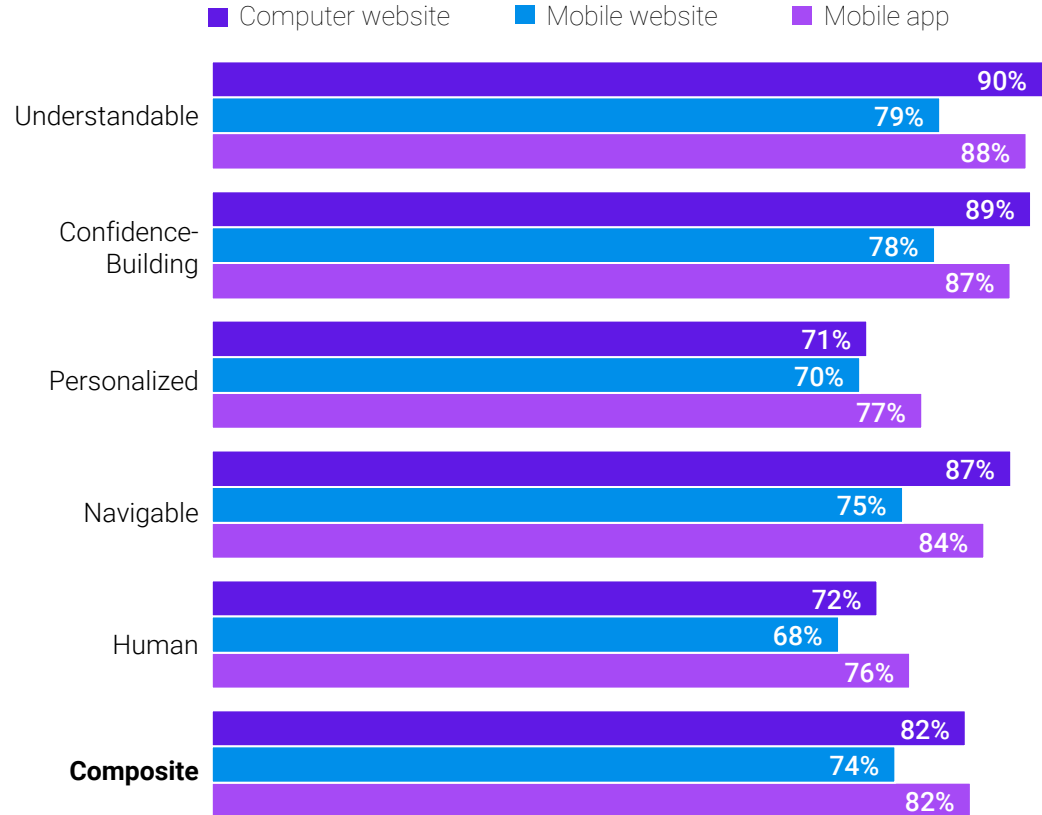
KEY TAKEAWAYS

- + Overall, banking consumers provided a similar composite rating for computer websites and mobile apps (82%), and rated banks' mobile website experience lowest (74%).
- + Across all statements, banking consumers most frequently agreed that *it was easy to understand the information provided* for all access methods.
- + Those who used a bank's mobile website and mobile app rated the *Human* component lowest. *Personalized* rated lowest for those who used a computer website.

ABOUT

This chart shows how digital banking consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Banking
(Percent agree or strongly agree)



Humanized Digital Experience: Retail

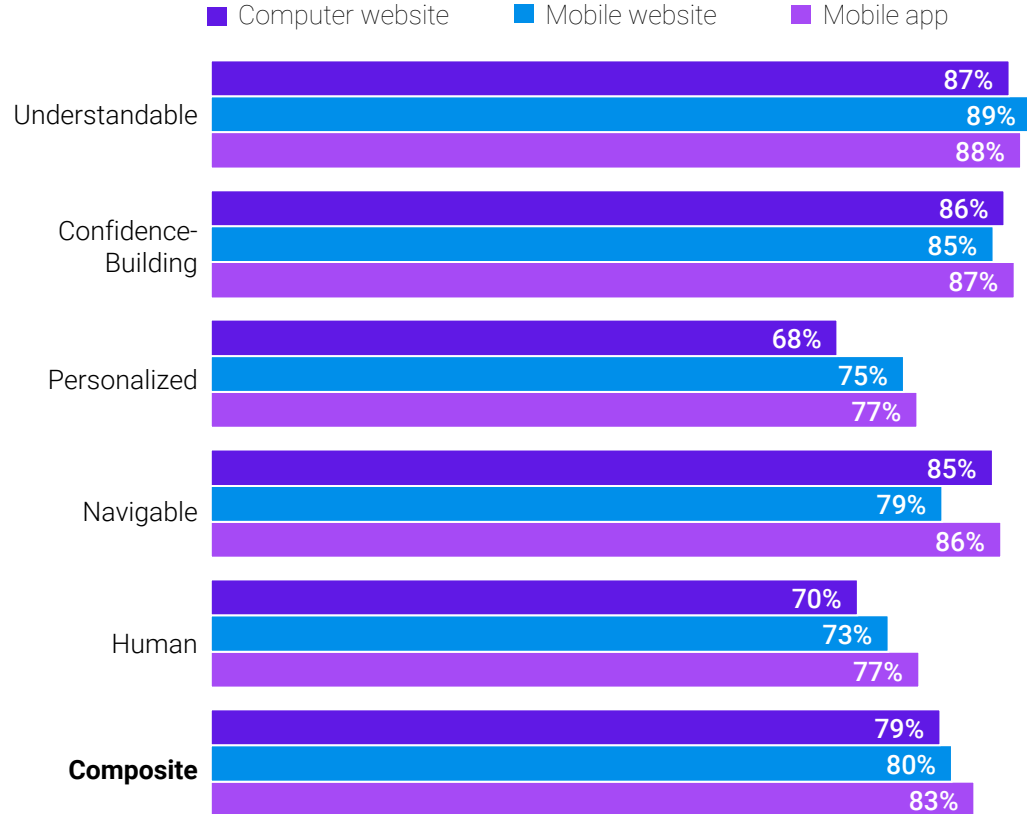
KEY TAKEAWAYS

- + Overall, retail consumers gave the highest composite rating to mobile app retail experiences (83%), and the worst rating to computer websites (79%).
- + Across all statements, retail consumers most frequently agreed that *it was easy to understand the information provided* for all access methods.
- + Those who used a retailer's computer website and mobile app rated the *Personalized* component lowest. *Human* rated lowest for those who used a mobile website.

ABOUT

This chart shows how digital retail consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Retail
(Percent agree or strongly agree)



Humanized Digital Experience: Health Insurance

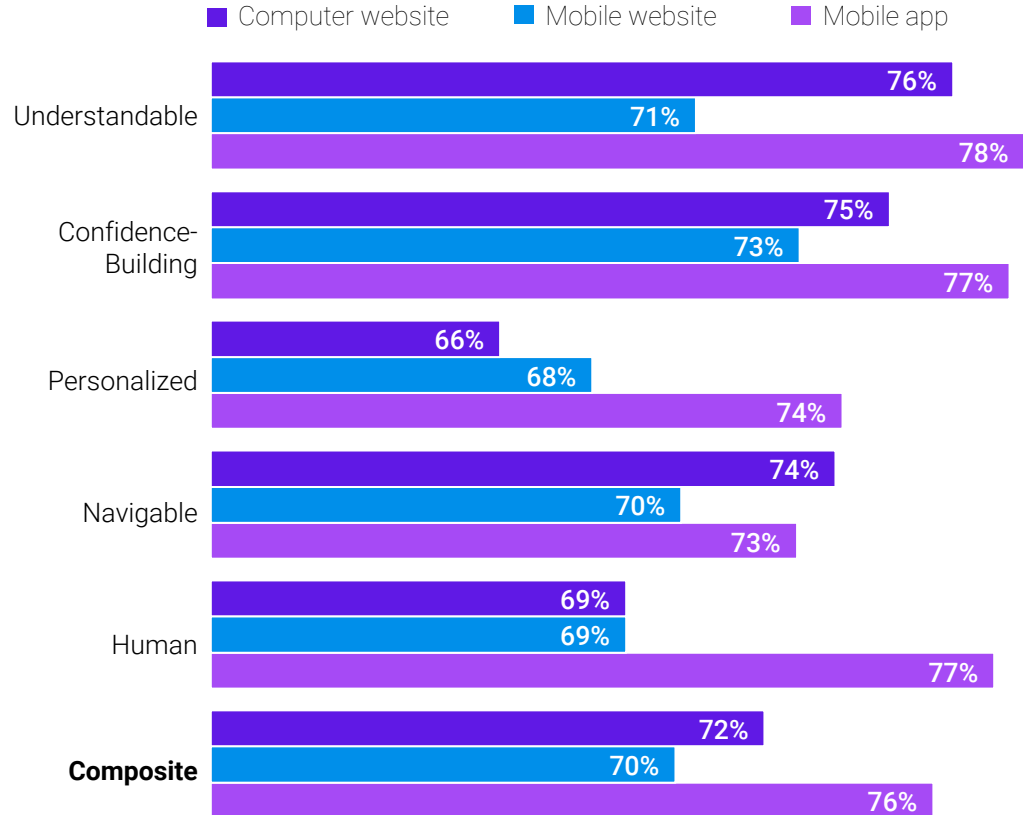
KEY TAKEAWAYS

- + Overall, members gave the highest composite rating to mobile app health insurance experiences (76%), and the worst rating to mobile websites (70%).
- + Health insurance members least frequently agreed that *the experience was personalized to [their] needs*, with an average rating of 69%.
- + Of the five components, *Human* has the largest gap between the three digital channels, with 8 percentage points between mobile app and mobile website experiences.

ABOUT

This chart shows how digital health insurance consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Health Insurance
(Percent agree or strongly agree)



Humanized Digital Experience: Fast Food

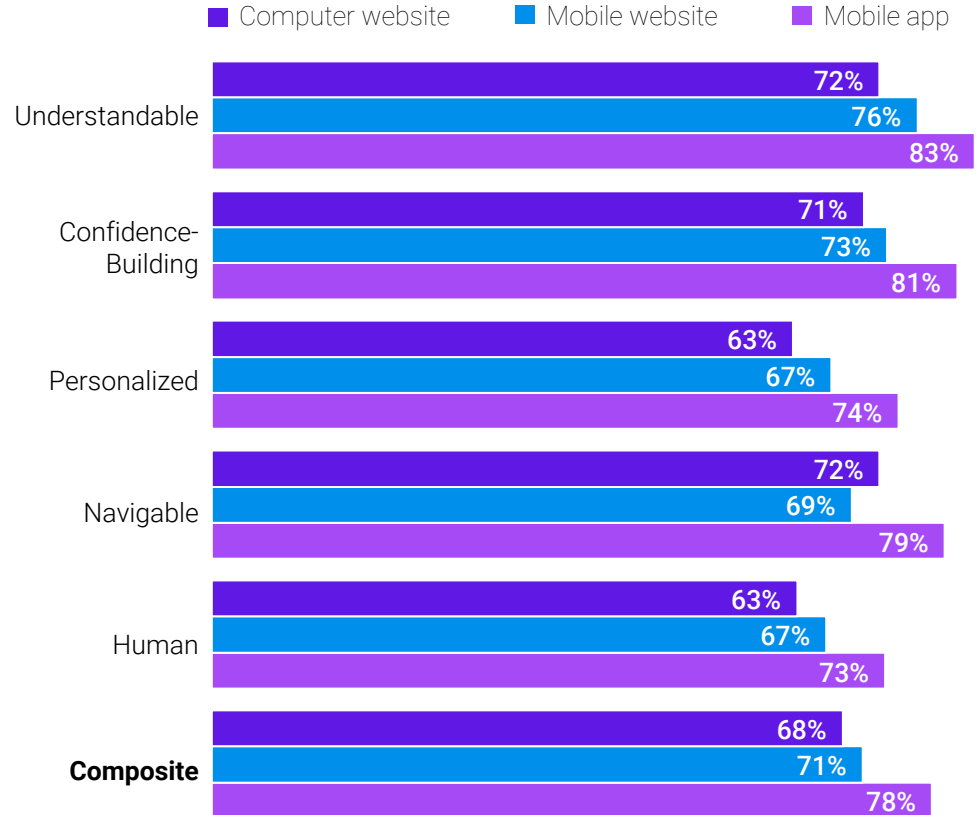
KEY TAKEAWAYS

- + Overall, fast food customers gave the highest composite rating to mobile app fast food experiences (78%), and the worst rating to computer websites (68%).
- + Fast food customers least frequently agreed that *the organization treated me like a human being*, with an average rating of 68%.
- + Of the five components, *Personalized* and *Understandable* have the largest gap between the three digital channels, with 11 percentage points between mobile app and computer website experiences.

ABOUT

This chart shows how digital fast food consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Fast Food
(Percent agree or strongly agree)



Humanized Digital Experience: Streaming Media

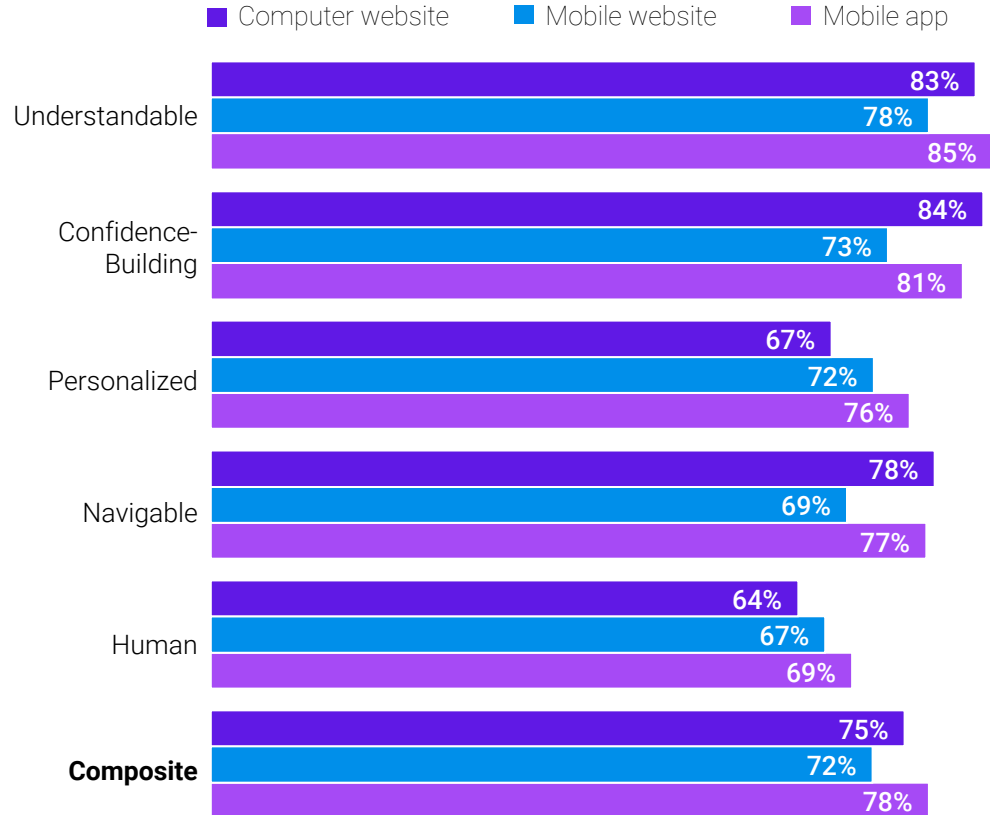
KEY TAKEAWAYS

- + Overall, consumers gave the highest composite rating to mobile app streaming media experiences (78%), and the worst rating to mobile websites (72%).
- + Streaming media consumers least frequently agreed that *the organization treated me like a human being*, with an average rating of 67%.
- + Of the five components, *Confidence-Building* had the largest gap between the three digital channels, with 11 percentage points between computer website and mobile website experiences.

ABOUT

This chart shows how digital streaming media consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Streaming Media (Percent agree or strongly agree)



Humanized Digital Experience: Airline

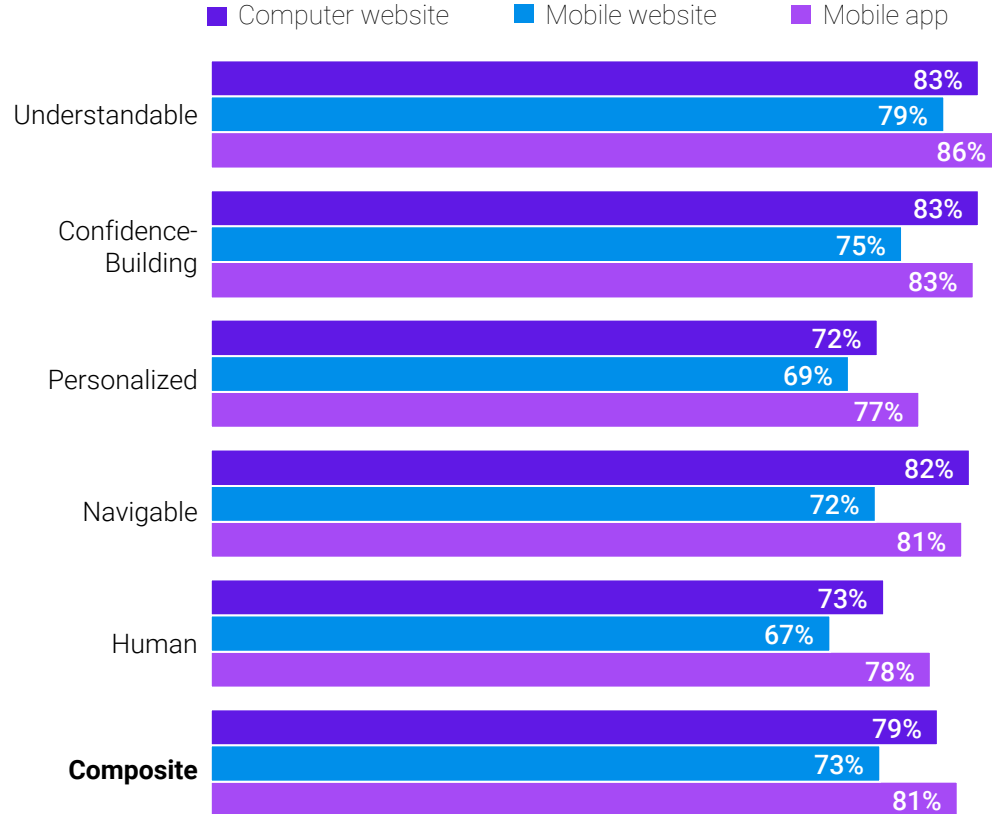
KEY TAKEAWAYS

- + Overall, consumers gave the highest composite rating to mobile app airline experiences (81%), and the worst rating to mobile websites (73%).
- + Streaming media consumers least frequently agreed that *the experience was personalized to [their] needs*, with an average rating of 72%.
- + Of the five components, *Human* had the largest gap between the three digital channels, with 11 percentage points between mobile app and mobile website experiences.

ABOUT

This chart shows how digital airline consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Airline
(Percent agree or strongly agree)



Humanized Digital Experience: Food Takeout & Delivery

KEY TAKEAWAYS

- + Overall, consumers gave the highest composite rating to mobile app food takeout and delivery experiences (80%), and the worst rating to mobile websites (77%).
- + Food takeout and delivery consumers least frequently agreed that *the organization treated me like a human being*, with an average rating of 75%, and had the highest propensity to agree that *it was easy to understand the information provided*.

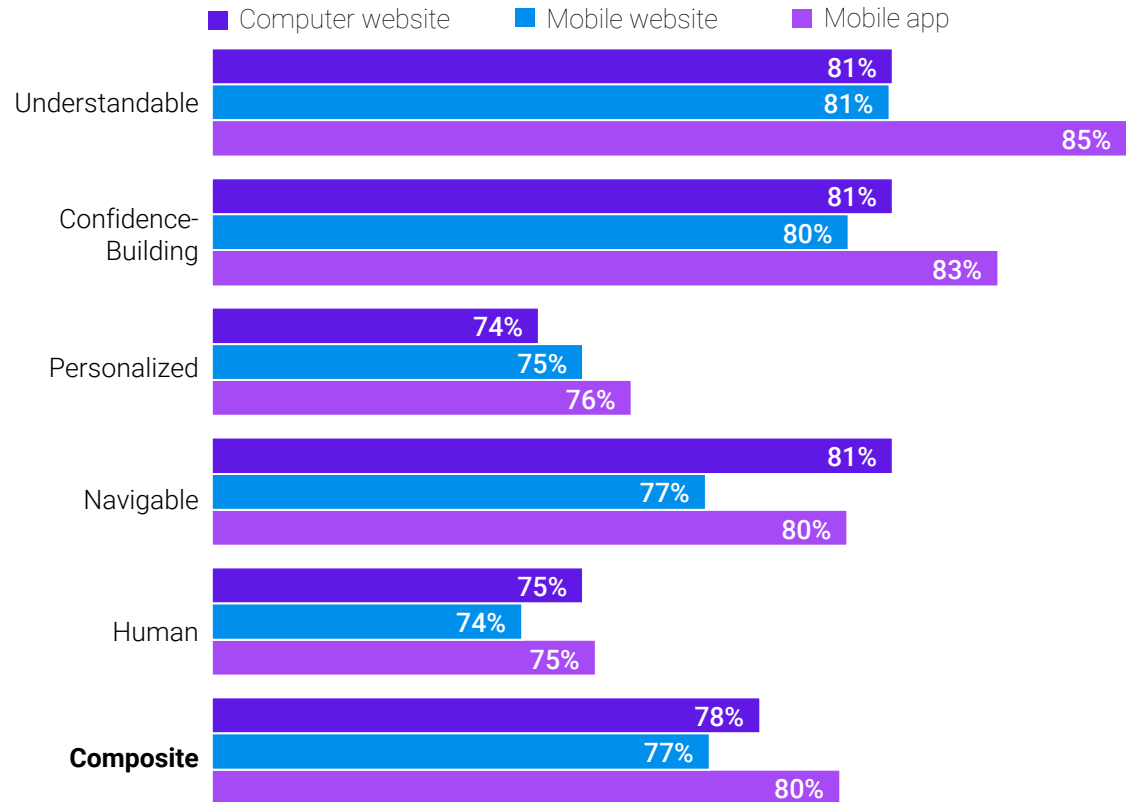
ABOUT

This chart shows how digital food takeout & delivery consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement:

Food Takeout & Delivery

(Percent agree or strongly agree)



Humanized Digital Experience: Grocery

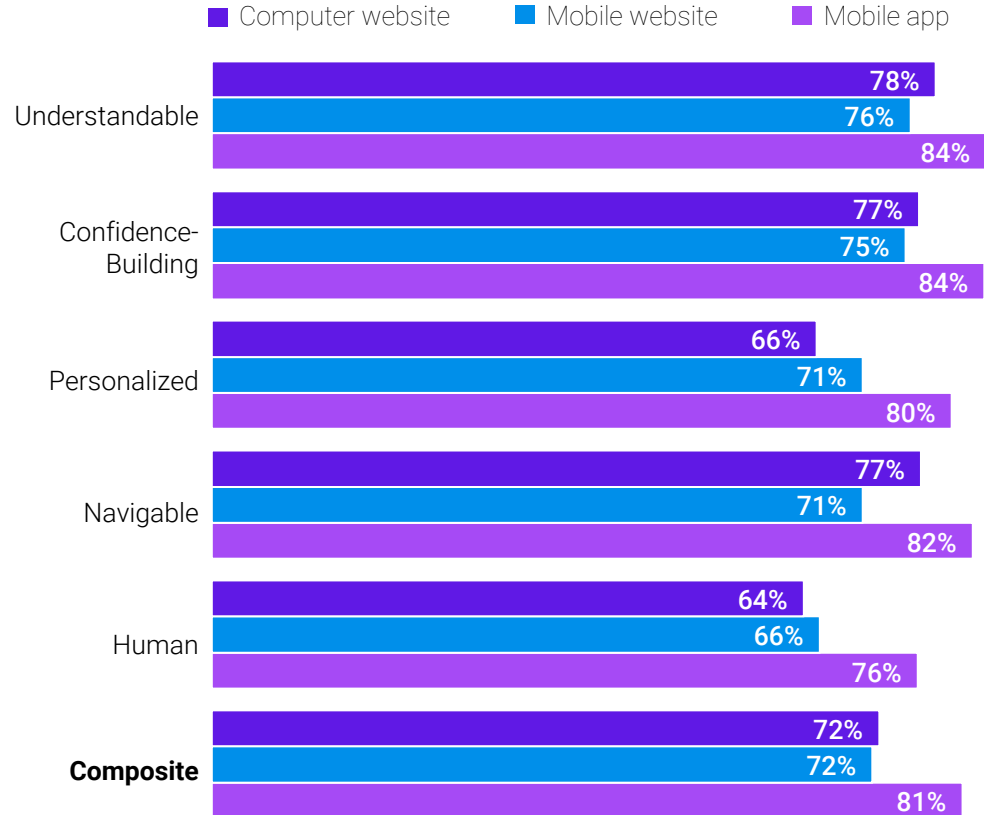
KEY TAKEAWAYS

- + Overall, consumers gave the highest composite rating to mobile app grocery experiences (81%), and similarly low ratings to both computer and mobile websites (72%).
- + Grocery consumers least frequently agreed that *the organization treated me like a human being*, with an average rating of 69%.
- + Of the five components, *Personalized* had the largest gap between the three digital channels, with 14 percentage points between computer website and mobile app experiences.

ABOUT

This chart shows how digital grocery consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Grocery
(Percent agree or strongly agree)



Humanized Digital Experience: Rideshare

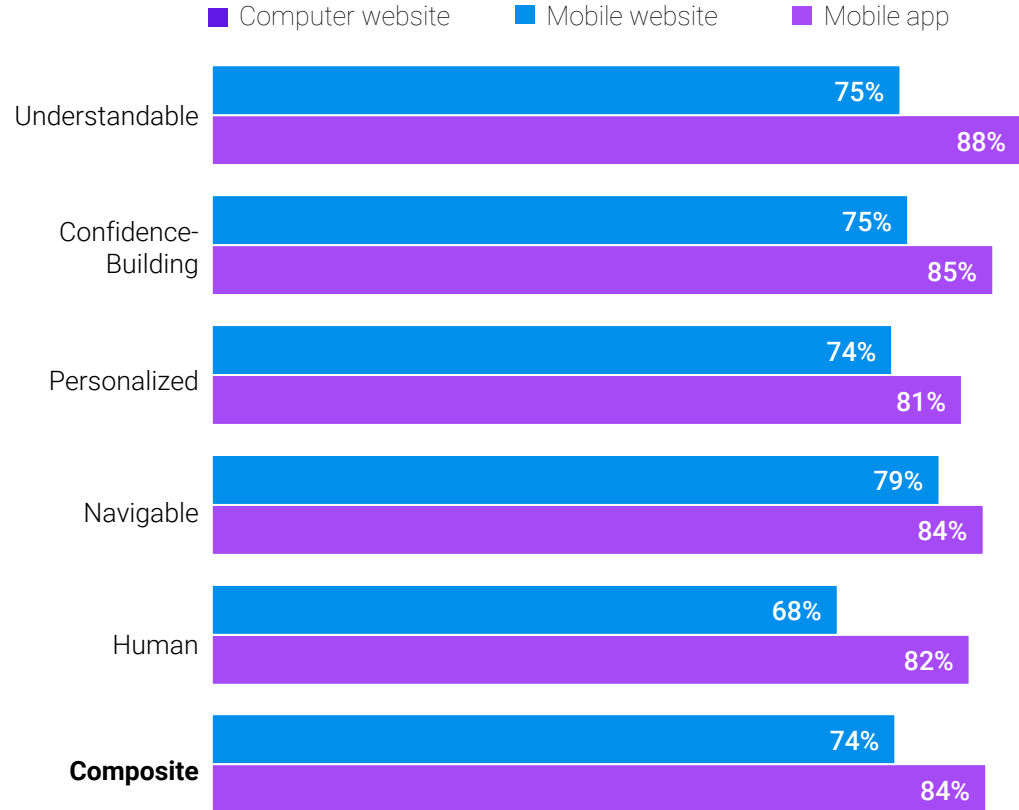
KEY TAKEAWAYS

- + Overall, users gave a higher rating to mobile app rideshare experiences (84%), and a lower rating to mobile website experiences (74%).
- + Rideshare users least frequently agreed that *the organization treated me like a human being*, with an average rating of 75%. These elements also had the largest gap between the two access methods, at 14 percentage points.
- + There was not enough data collected to measure users' computer website rideshare experiences.

ABOUT

This chart shows how digital rideshare consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Rideshare
(Percent agree or strongly agree)



Humanized Digital Experience: Federal Government

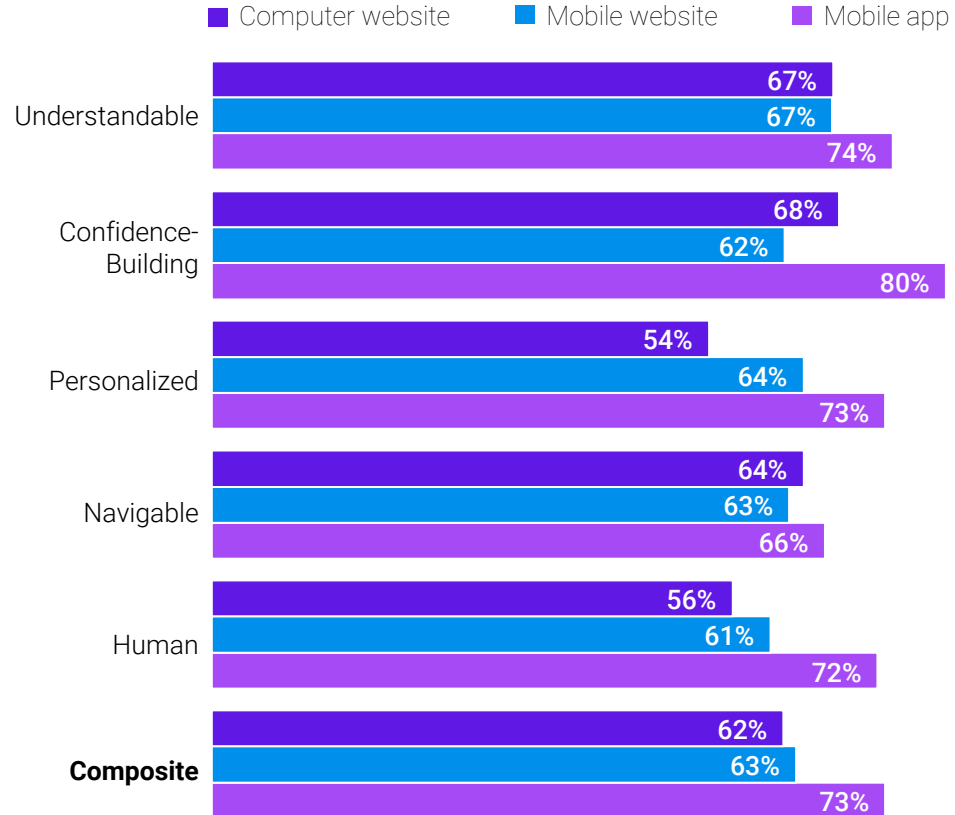
KEY TAKEAWAYS

- + Overall, users gave the highest composite rating to federal government mobile app experiences (73%), and similarly low ratings to computer websites (62%).
- + Federal government digital users least frequently agreed that *the organization treated me like a human being*, with an average rating of 63%.
- + Of the five components, *Personalized* had the largest gap between the three digital channels, with 19 percentage points between mobile app and computer website experiences.

ABOUT

This chart shows how digital federal government consumers rated each of the five components and the composite Humanized Digital Experience rating they provided according to their access method.

To what degree do you agree or disagree with each statement: Federal Government (Percent agree or strongly agree)



Digital Experience Problem Rates

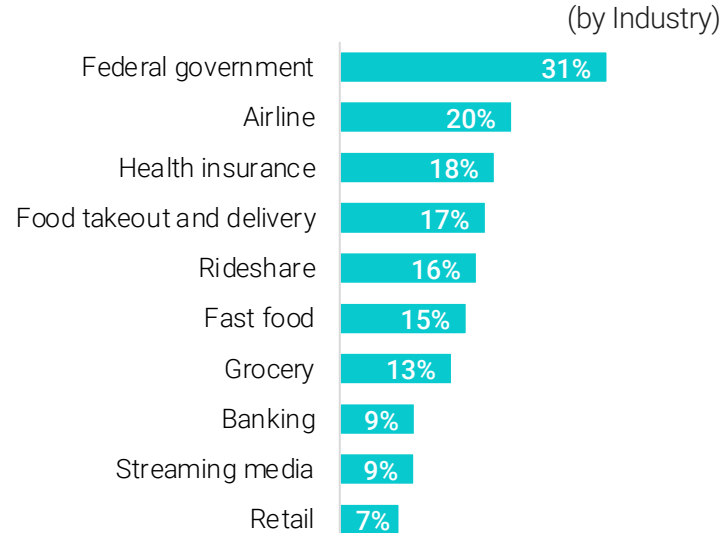
KEY TAKEAWAYS

- + Thirty-one percent of consumers reported encountering problems during their digital experience with the federal government, the highest digital problem rate. Retailers had the lowest problem rate, at 7%.
- + Of those who had a problem with their digital grocery experience, just 56% agreed that it was *easy to access the support [they] needed to resolve that problem*, the highest rate across 9 industries.
- + Consumers found the most problems with mobile websites (17%) and had the easiest time resolving digital problems with mobile apps (58%).

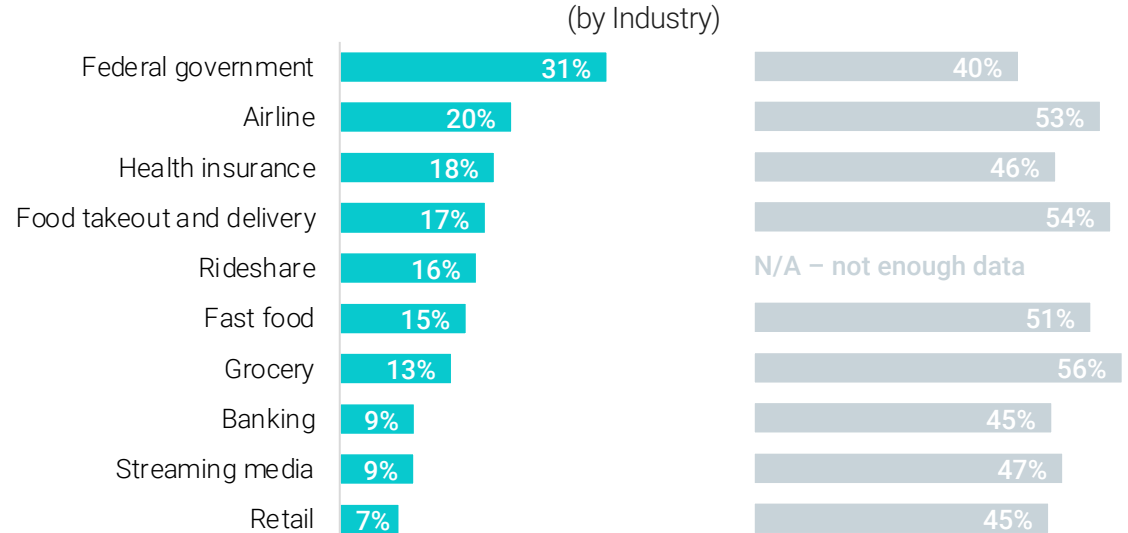
ABOUT

These charts show the percentage of consumers that said they had a problem with their digital experience with each industry/access method, as well as the percentage that considered it easy to access the support they needed to resolve that problem with the respective industry/access method.

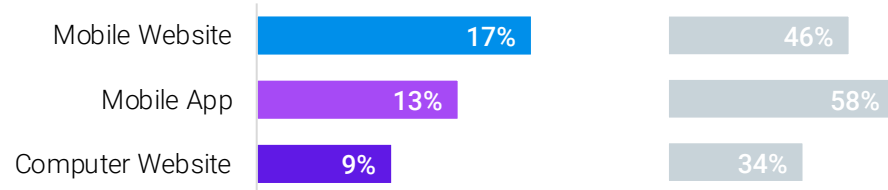
Digital Problem Rate



It was easy to access the support I needed to resolve that problem (Percent agree or strongly agree)



(by Access Method)



DATA CALCULATION

The charts in **Figure 2** show the Humanized Digital Experience composite rating for each industry/access method. This is calculated by taking the rating (% *strongly agree* + % *somewhat agree*) for each component for all the responses to each industry/access method and averaging those five component percentages together (See Figure 1 for more details).

Figure 3 was calculated by taking the total number of responses at each scale point for each component and dividing it by the total number of responses to each question.

Figures 4 – 13 were calculated by finding the component ratings for each access method within the respective industry, and then averaging the five component ratings for each access method together to derive the composite ratings.

Figure 14 was calculated by taking the number of responses reporting a problem (*Did you encounter any problems yes/no*) with their digital experience with an industry/access method and dividing that by the total number of responses for each access method/industry.

For the charts on the right, we took the total number for each industry/access method that *somewhat* or *strongly agree* that *it was easy to access the support I needed to resolve that problem* and divided it by the number of reported problems for each industry/access method.

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