



DATA SNAPSHOT

Global Study: Consumer Channel Preferences, 2024

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of Qualtrics XM Institute's 2023 Global Consumer Study, more than 28,000 consumers told us which of six channels (*chat with an automated system, self-service on mobile, self-service on computer, chat with a person on computer, talk with someone on the phone, or meet with someone in person*) they would prefer to use to complete nine common interactions. From our analysis, we found that:

- + **Consumers prefer human channels.** On average, across all countries and activities, 62% of consumers prefer using one of three human-mediated channels (*chat with a person on a computer, talk with someone on the phone, meet with someone in person*). This preference is strongest for receiving advice from a nurse/doctor and weakest for booking a plane ticket.
- + **Chat with an automated system is the least popular channel.** Consumers are least likely to prefer using chat with an automated system. Only 10% on average would prefer to use this channel across nine common activities. This channel is most popular for getting the status on an order, with 13% preferring to use it to complete this activity.
- + **Younger consumers are the least likely to prefer self-service on a computer.** Compared to consumers from the two older age groups, consumers between 18 and 34 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 mobile* and *chat with a person on a computer*.
- + **Filipino consumers are the most likely to prefer human-mediated channels.** Filipino consumers prefer to use one of three human-assisted channels 74% of the time, the most of any country. South Korean and Finnish consumers are the least likely to prefer using human channels, with only 50% each country favoring them.

STUDY KEY FACTS

- Global consumer study
- Online panel study
- Conducted in Q3 of 2023
- 26 countries
- 28,400 consumers

Global Study: Consumer Channel Preferences, 2024

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2023. Using an online survey, XM Institute collected data from 28,400 consumers across 26 countries/regions: Argentina, Australia, Brazil, Canada, China, Colombia, Finland, France, Germany, Hong Kong (China), India, Indonesia, Italy, Japan, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Korea, Spain, Sweden, Thailand, the United Arab Emirates, the United Kingdom, and the United States.

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: 400. Finland & New Zealand: 600. Singapore and the UAE: 800.

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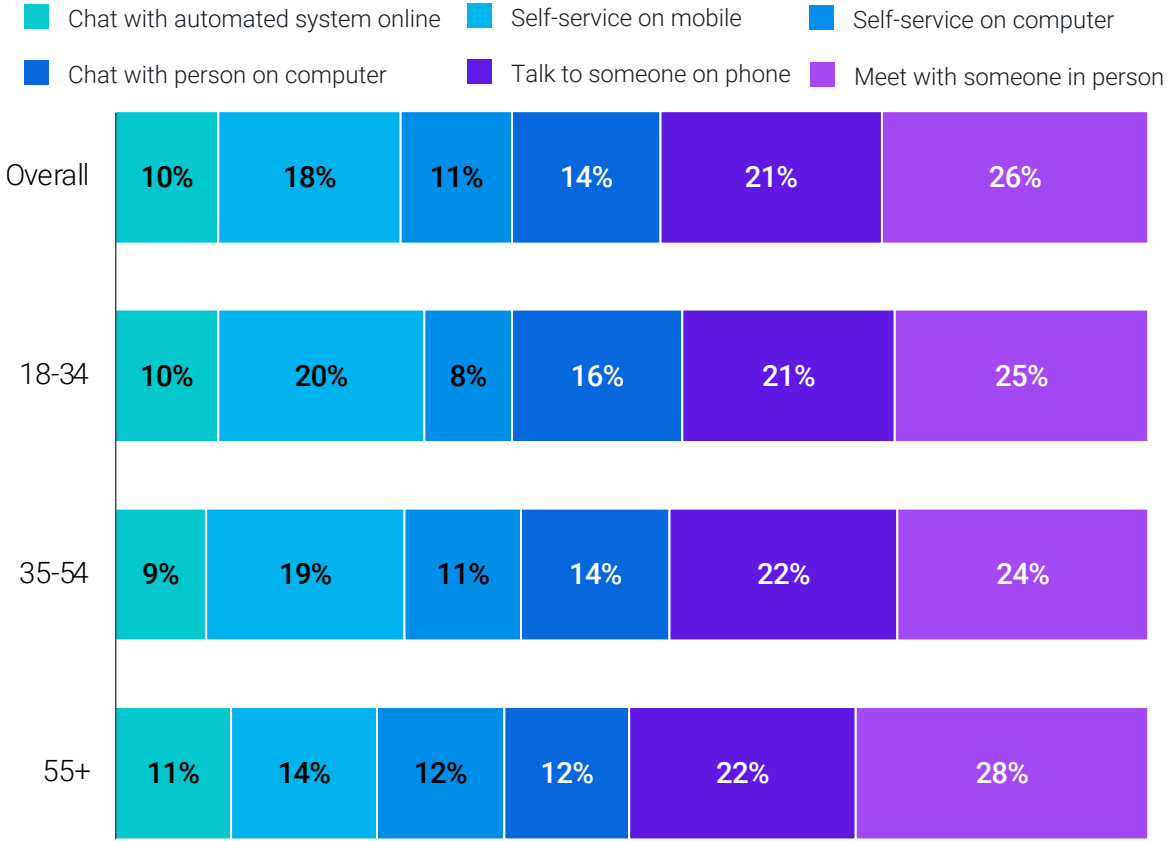
Methodology

Average Across Interactions by Age

KEY TAKEAWAYS

- + Across all age groups and interactions, on average 62% of consumers prefer human interaction channels – *chat with someone on a computer, talking on the phone, or meeting in person.*
- + Consumers over the age of 55 are on average the most likely to prefer meeting in person (28%) to complete nine common interactions.
- + *Chat with an automated system* is on average the least popular of six channels.

Average Channel Preferences for Nine Common Interactions



ABOUT

This chart shows the percentage of consumers of each age, on average across all countries, that would prefer to use each channel on average across nine common interactions.

Data is only reported for age groups within each country with 100+ respondents.

Base: 28,400 consumers across 26 countries
 Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Average Across Interactions by Country (Part 1)

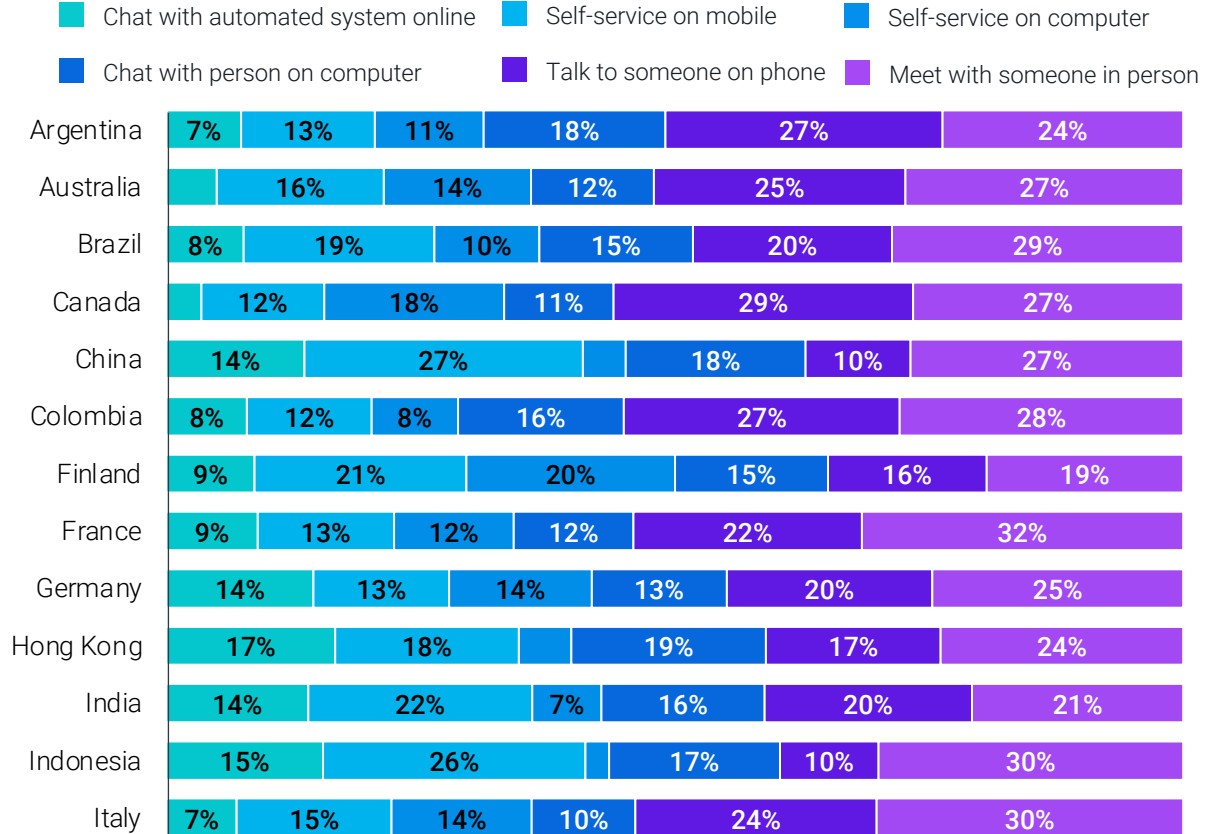
KEY TAKEAWAYS

- + Chinese consumers have the highest propensity of all countries to prefer using *self-service on mobile* (27%) to complete nine common interactions.
- + Indonesian consumers are the least likely, across all countries, to either use *self-service on computer* (2%) or *talk to someone on the phone* (10%).
- + Just three percent of Canadians on average would prefer to use *chat with an automated system online* to complete interactions, with the least interest in automated systems across all countries.

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel on average across nine common interactions.

Average Channel Preferences for Nine Common Interactions

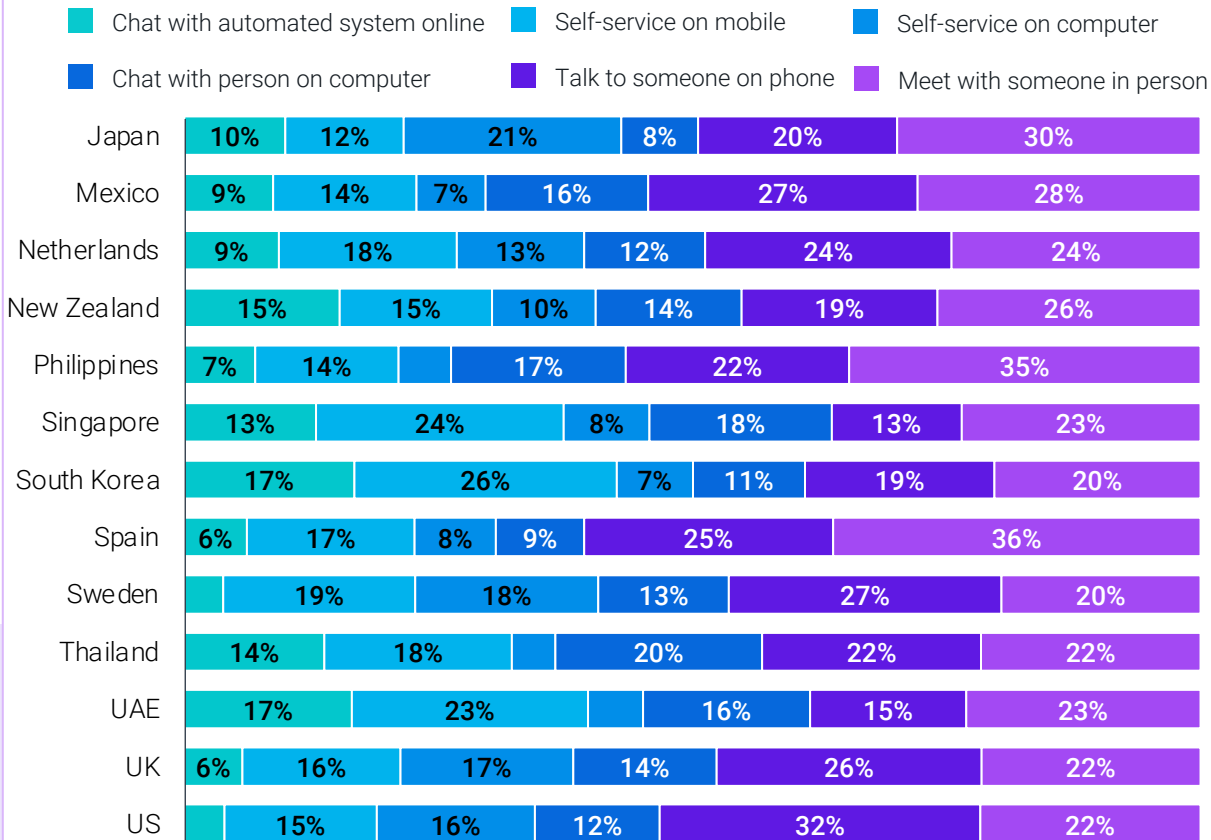


Average Across Interactions by Country (Part 2)

KEY TAKEAWAYS

- + Spanish consumers have the greatest preference to *meet with someone in person* to complete nine common interactions, with 36% on average preferring this channel. Meanwhile, US consumers have the highest preference of all countries for *talking on the phone* (32%).
- + Consumers in Japan are the most likely of all countries to prefer using *self-service on computer* to complete interactions (21%).

Average Channel Preferences for Nine Common Interactions



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel on average across nine common interactions.

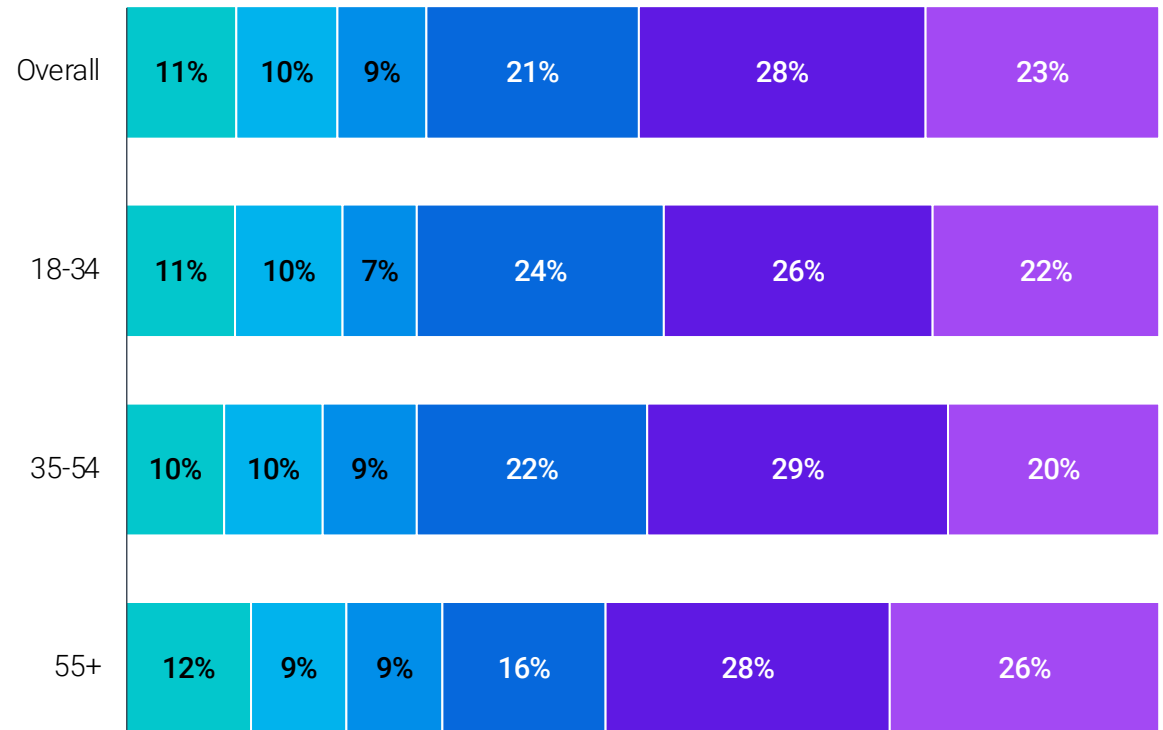
Getting Technical Support by Age

KEY TAKEAWAYS

- + Consumers most prefer to *talk to someone on the phone* in order to get technical support for a computer (28%). Just nine percent would prefer to use self-service on a computer.
- + Older consumers are the most likely to prefer *meeting with someone in person* to get tech support (26%).
- + Younger consumers prefer chatting with someone on a computer 8 percentage points more frequently than older consumers.

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

- Chat with automated system online
- Self-service on mobile
- Self-service on computer
- Chat with person on computer
- Talk to someone on phone
- Meet with someone in person



ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to get technical support for a computer.

Data is only reported for age groups within each country with 100+ respondents.

Getting Technical Support by Country (Part 1)

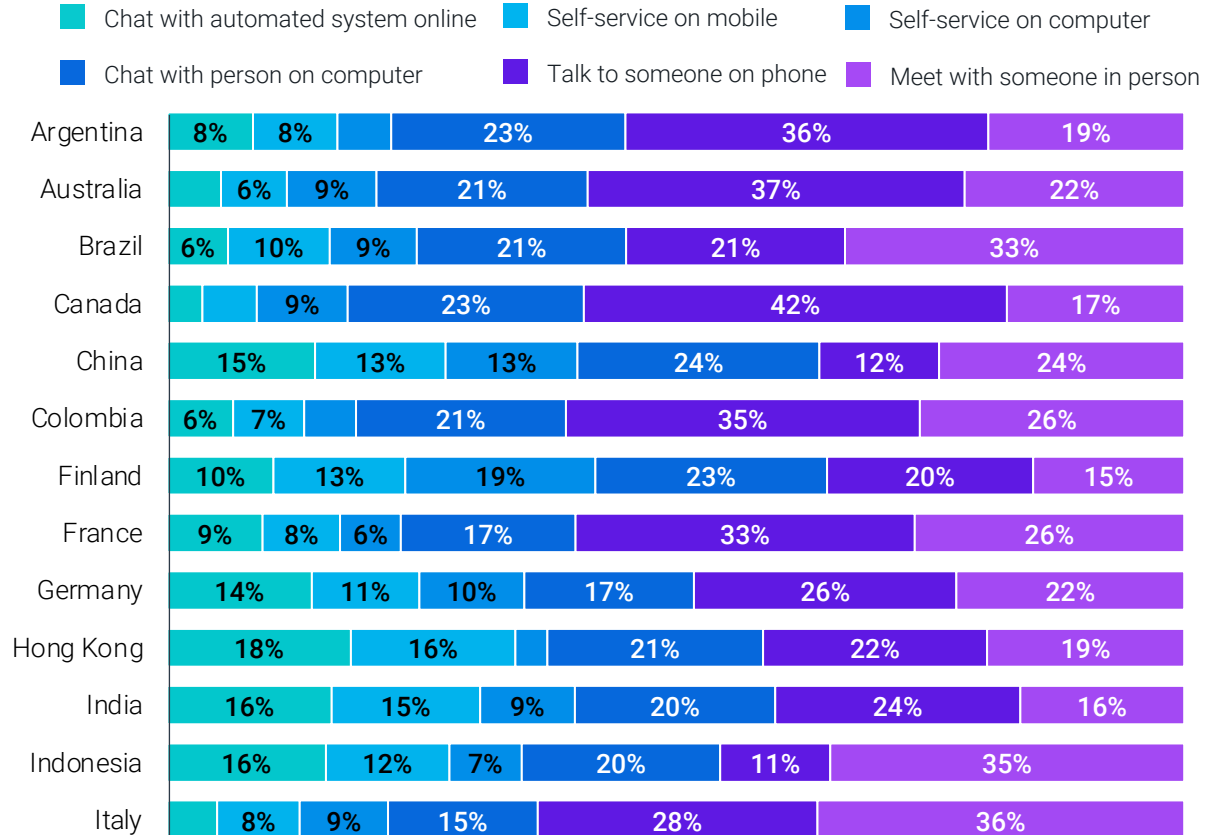
KEY TAKEAWAYS

- + Italian consumers are the most likely to prefer getting tech support by *meeting with someone in person* (36%).
- + Canadian consumers are the least likely to prefer using *chat with an automated system online* to get tech support (3%).
- + Indonesian consumers least frequently prefer talking on the phone to get tech support, at 11%.

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to get technical support for a computer.

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

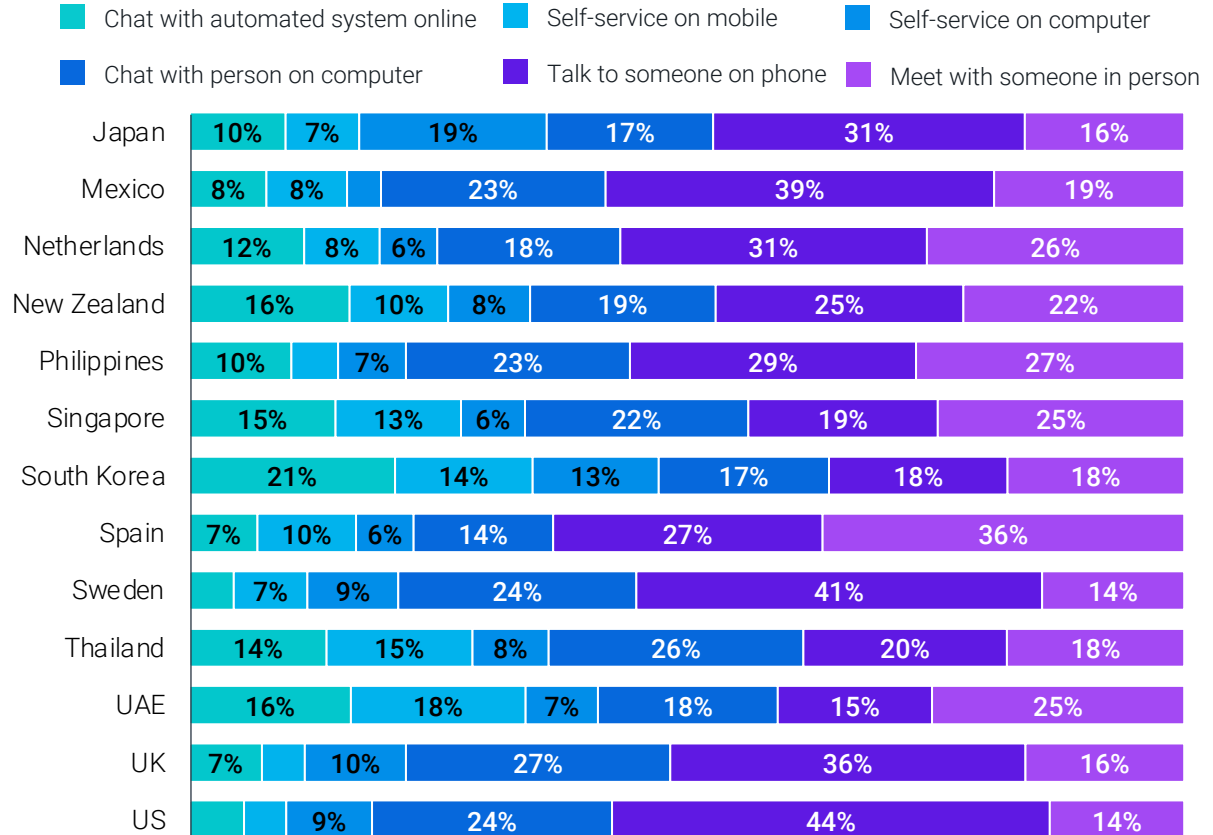


Getting Technical Support by Country (Part 2)

KEY TAKEAWAYS

- + US consumers are the most likely to prefer *talking on the phone* (44%) to get tech support.
- + South Korean consumers are the least likely to prefer using human channels (*chat with a person on a computer, talking on the phone, meeting with someone in person*) to get tech support, at 53%.
- + Swedish and US consumers are the least likely to want to *meet with someone in person* to get tech support (14%).

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to get technical support for a computer.

Resolving Billing Issues by Age

KEY TAKEAWAYS

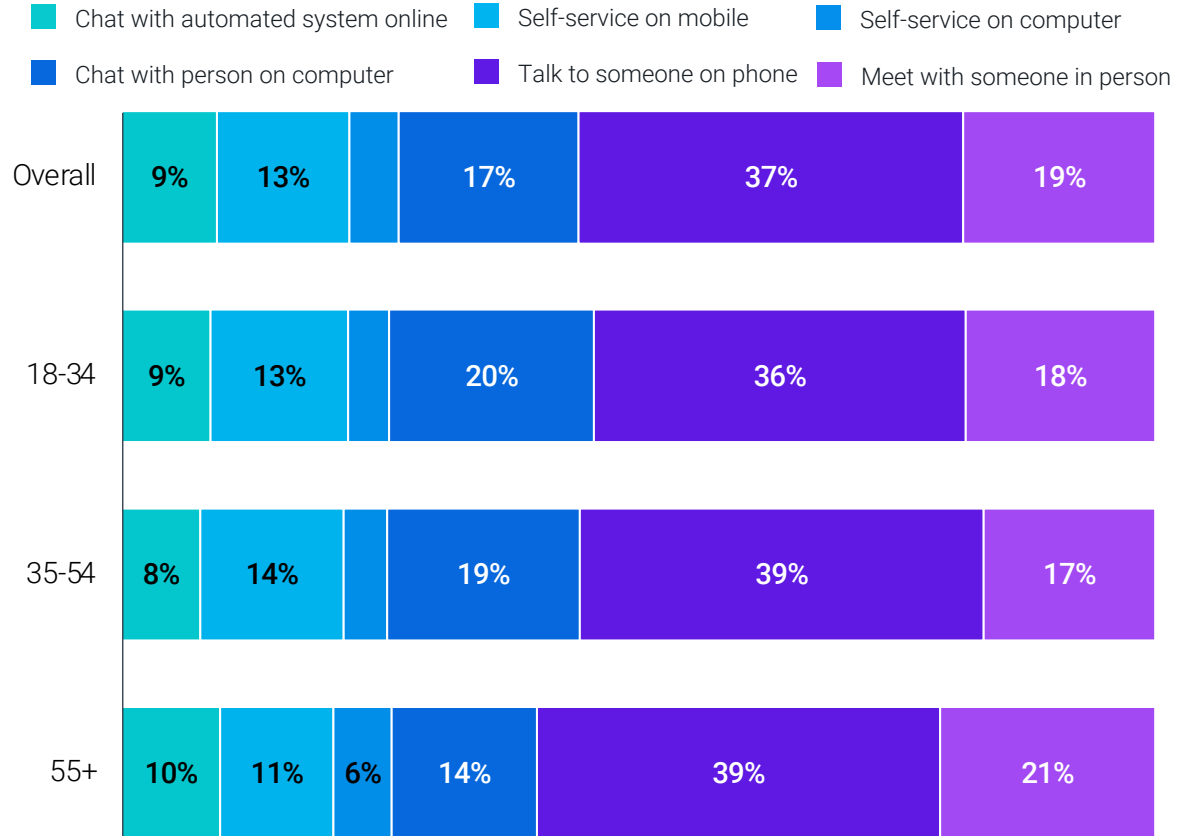
- + Consumers strongly prefer using human channels to resolve billing issues, with 73% preferring to use *chat with a person on computer*, *talk to someone on the phone*, or *meeting in person*.
- + Just four percent of all consumers would prefer to use self-service on a computer to resolve a billing issue.
- + Younger consumers are 3 percentage-points less likely to prefer talking to someone on the phone to resolve a billing issue compared to both their middle-aged and older counterparts.

ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to resolve an issue with a bill.

Data is only reported for age groups within each country with 100+ respondents.

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



Resolving Billing Issues by Country (Part 1)

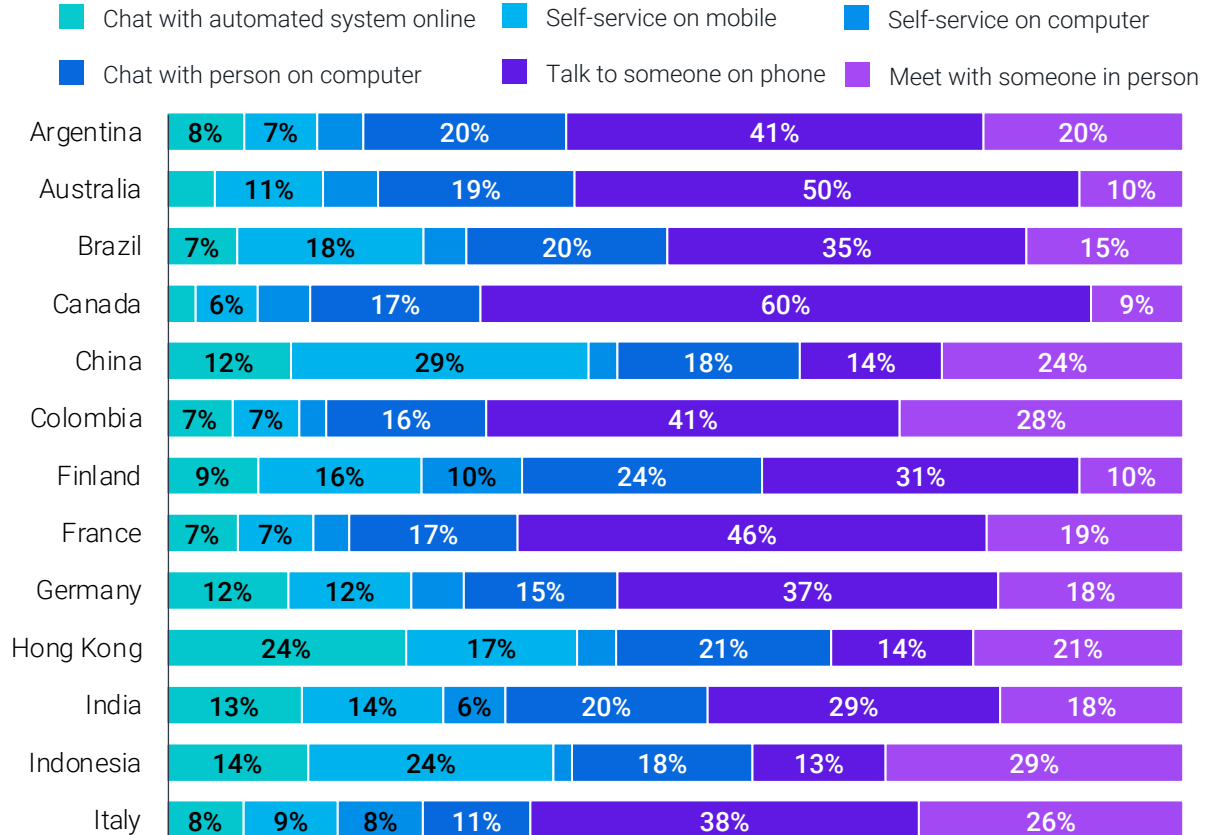
KEY TAKEAWAYS

- + Chinese consumers have the greatest preference to use self-service on mobile to solve a billing issue, at 29
- + Just three percent of Canadian consumers would most prefer to solve billing issues using *chat with an automated system online*. Hong Kong consumers have a much greater appetite for this channel (24%).

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to resolve an issue with a bill.

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



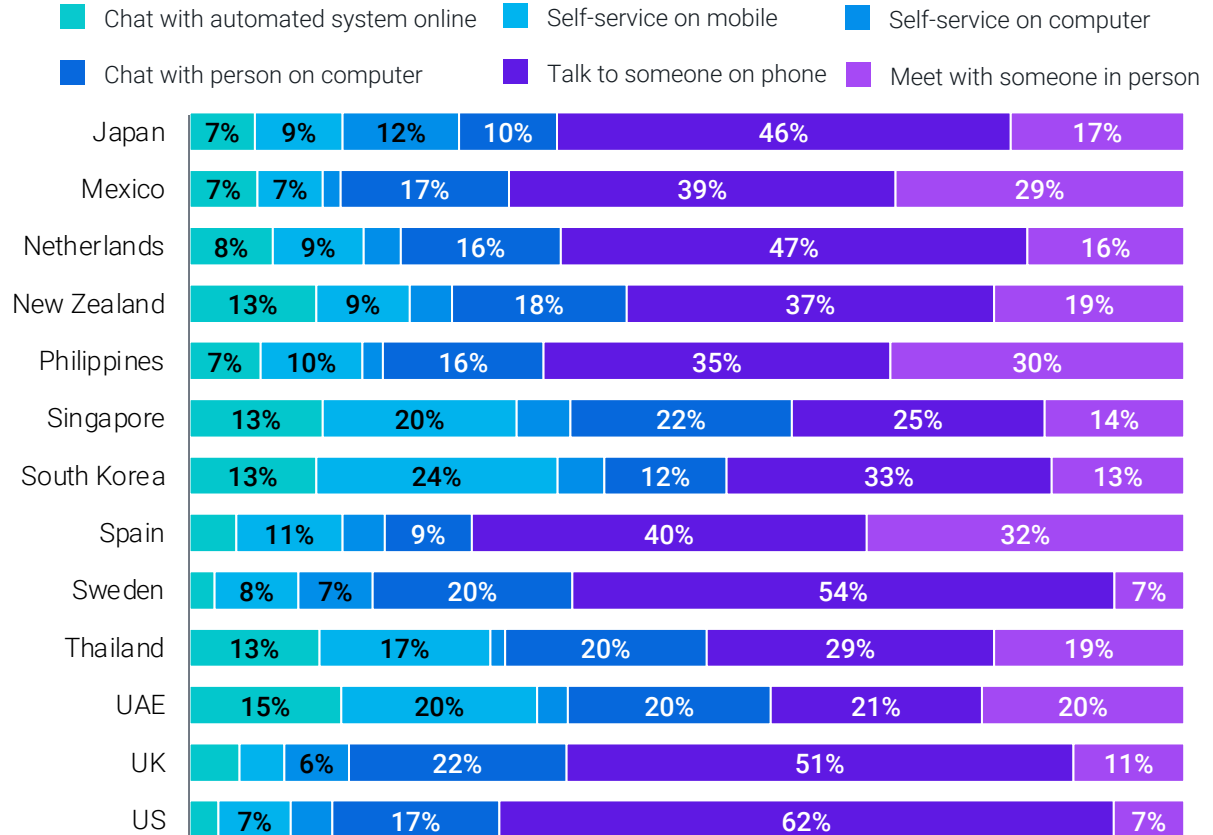
Resolving Billing Issues by Country (Part 2)

KEY TAKEAWAYS

+ American consumers have the highest propensity to resolve their billing issues over the phone, with 62% preferring this channel. Canadians follow close behind, with 60%.

+ *Meet with someone in person* is the preferred billing resolution channel for 32% of Spaniards and 30% of Filipinos.

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to resolve an issue with a bill.

Booking a Plane Ticket by Age

KEY TAKEAWAYS

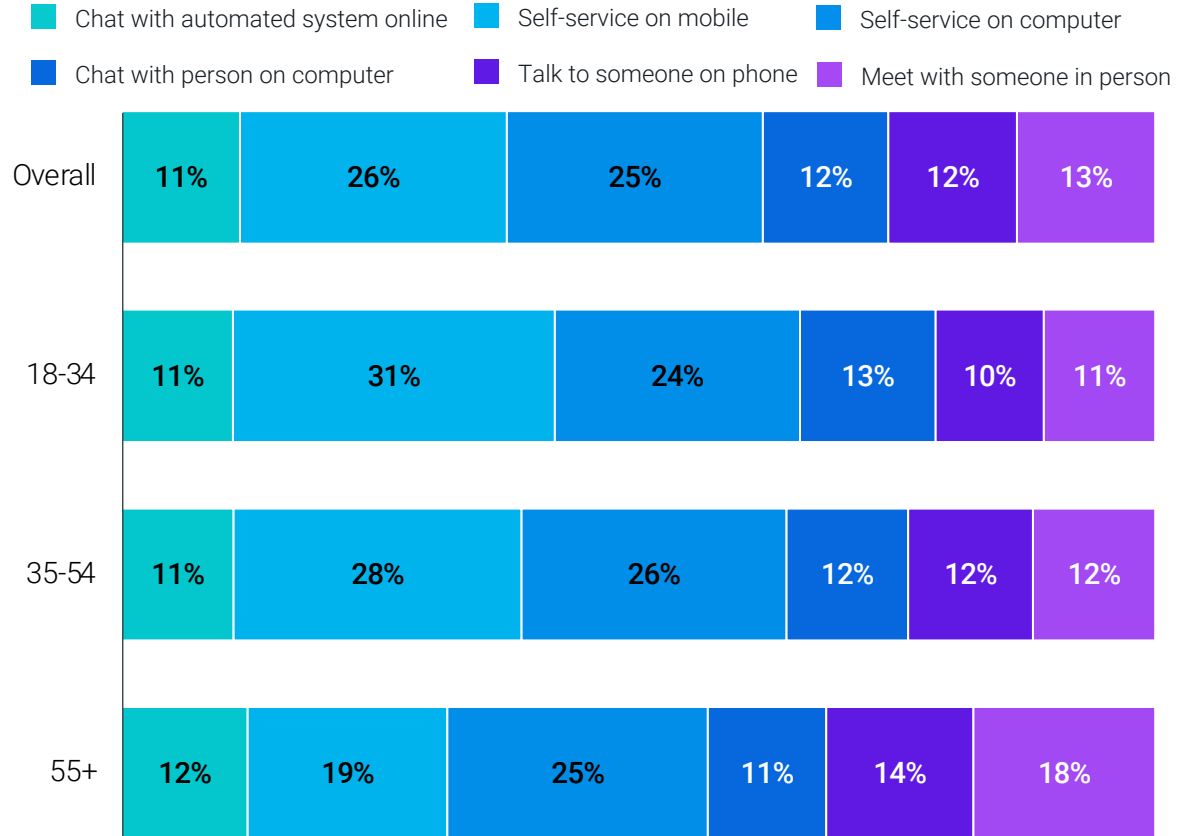
- + More than sixty percent of consumers prefer using one of three self-service channels (*chat with an automated system, self-service on mobile, self-service on computer*) to book a plane ticket.
- + Younger consumers have the greatest preference for self-service channels, at 66%, while older consumers are less likely to do so (57%).

ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to book an airline ticket.

Data is only reported for age groups within each country with 100+ respondents.

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



Booking a Plane Ticket by Country (Part 1)

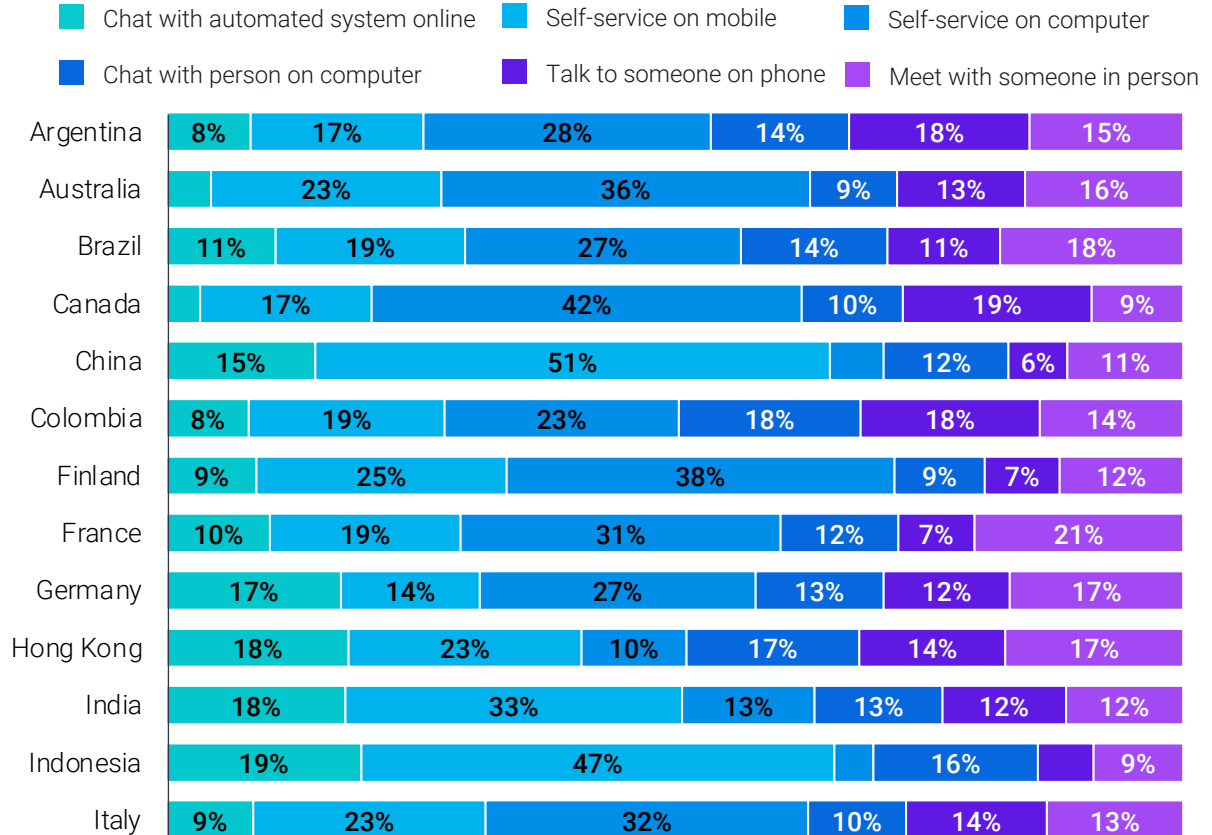
KEY TAKEAWAYS

- + More than half of Chinese consumers prefer booking plane tickets using *self-service on mobile* while just 17% of Canadian consumers say the same.
- + *Self-service on computer* is most preferred by Canadian consumers (42%).

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to book an airline ticket.

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

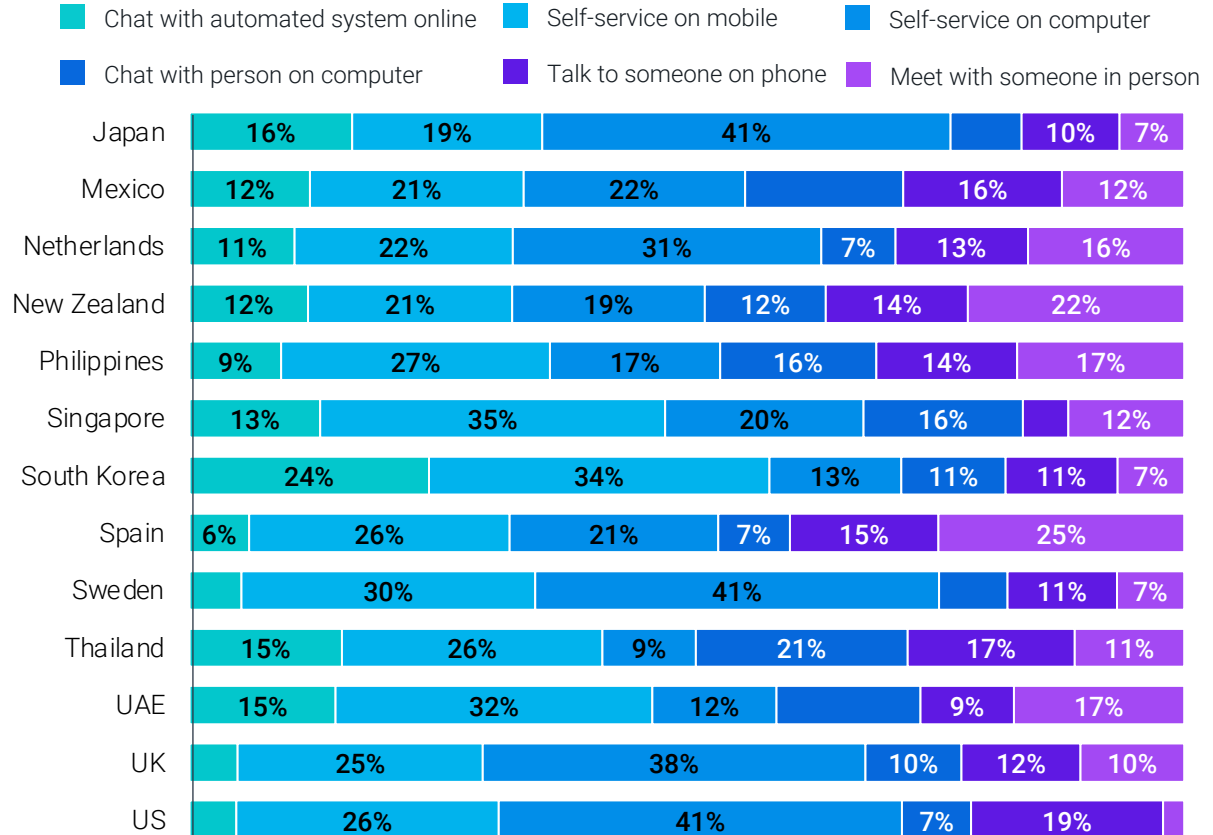


Booking a Plane Ticket by Country (Part 2)

KEY TAKEAWAYS

- + Just two percent of US consumers most prefer to meet in person to book a plane ticket, the lowest propensity across all 26 countries. Sweden and South Korea follow behind, at 7% each.
- + Singaporean consumers have the least interest in booking plane tickets over the phone, at just 5% each.

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to book an airline ticket.

Buying a TV by Age

KEY TAKEAWAYS

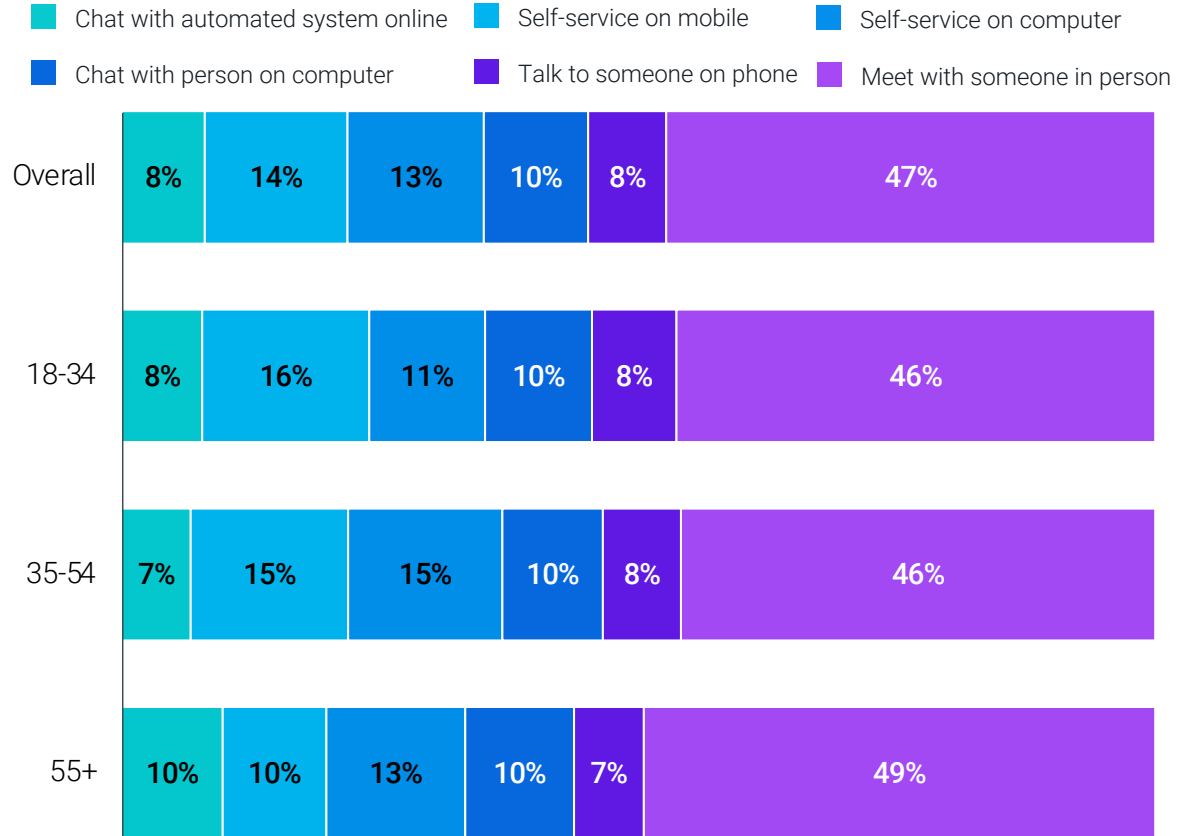
- + Forty-seven percent of all consumers would most prefer to buy a new TV in-person, the strongest single channel preference across all nine activities surveyed.
- + Middle-aged consumers have a greater preference for using one of three self-service channels (*chat with automated system, self-service on mobile, self-service on computer*) than their older and younger counterparts.

ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to purchase a new television.

Data is only reported for age groups within each country with 100+ respondents.

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



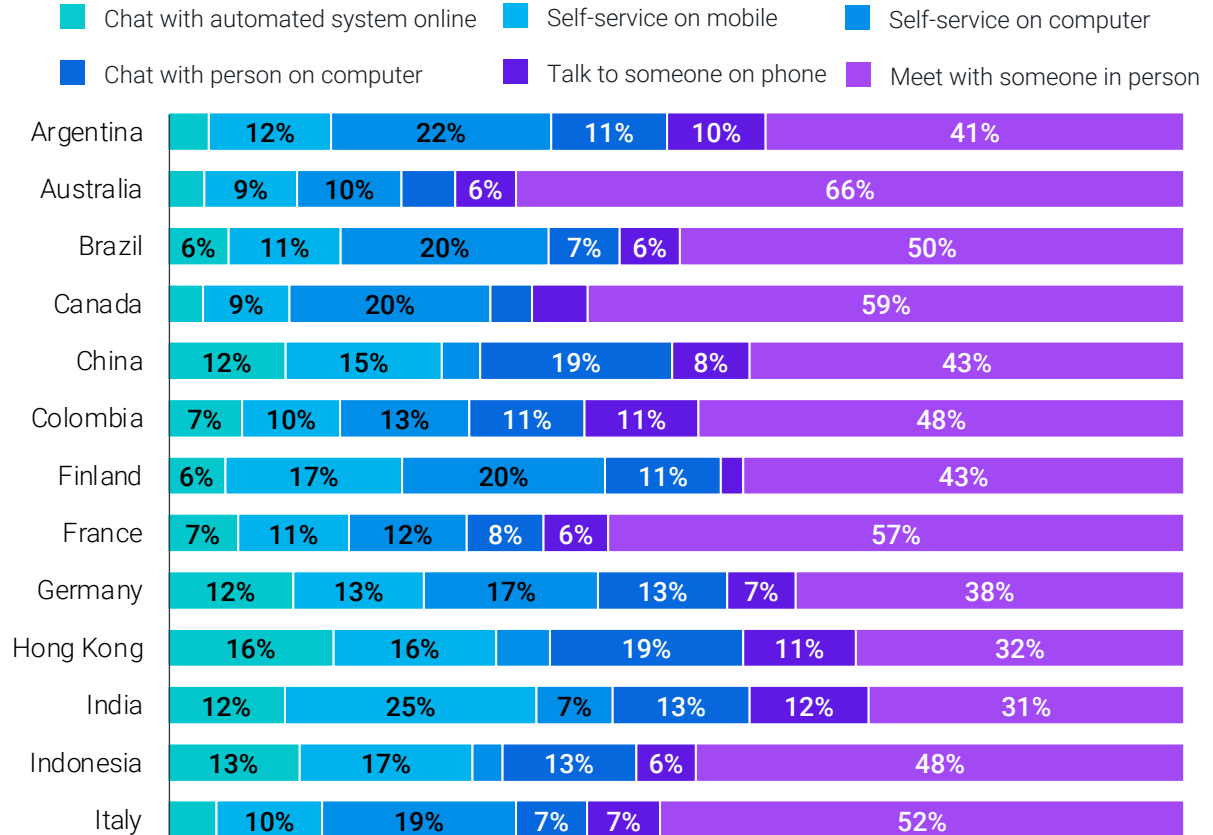
Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Buying a TV by Country (Part 1)

KEY TAKEAWAYS

- + Two-thirds of Australian consumers prefer buying a new TV in person, the strongest preference for this channel across all countries.
- + At just 2%, Finnish consumers are the least likely to prefer buying a new TV over the phone.

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



ABOUT

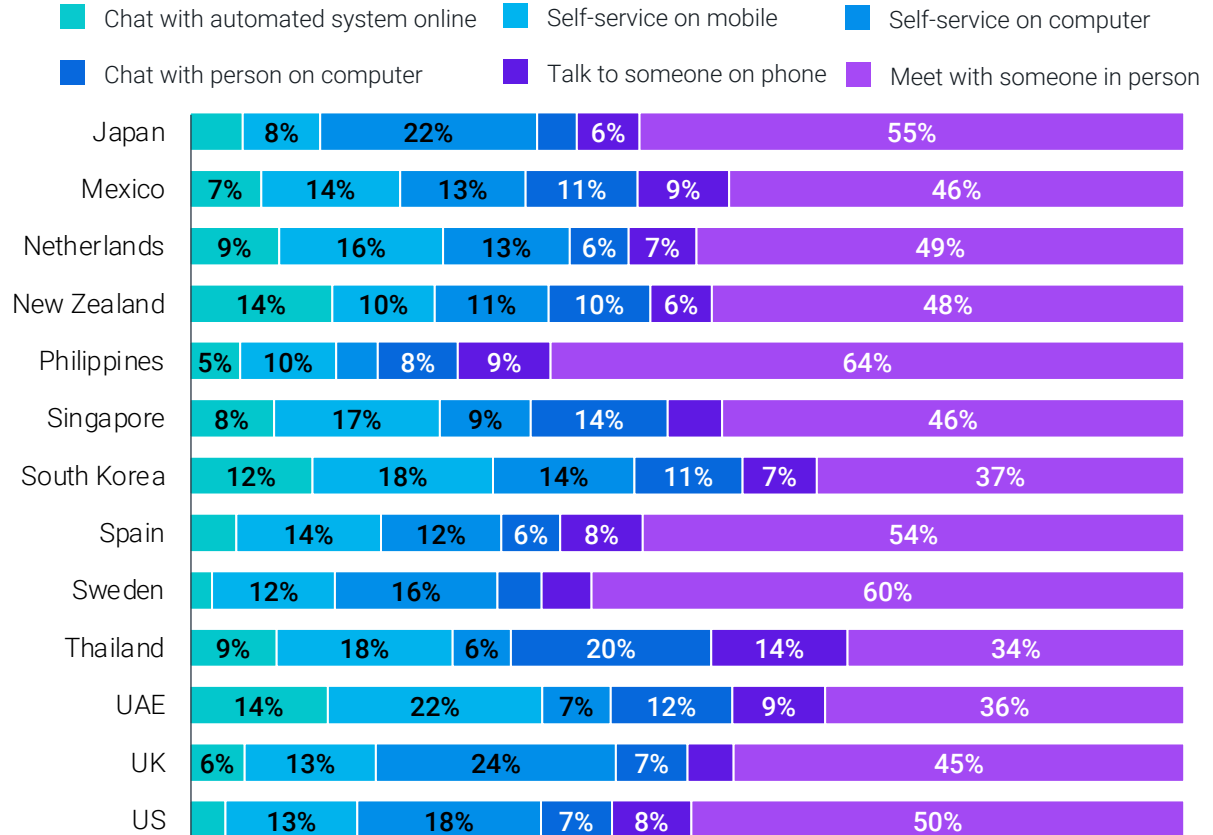
This chart shows the percentage of consumers in each country that would prefer to use each channel to purchase a new television.

Buying a TV by Country (Part 2)

KEY TAKEAWAYS

- + Among these thirteen countries' consumers, Emiratis have the strongest preference to use *self-service on mobile* to buy a new TV, at 22%.
- + UK consumers have the highest propensity to purchase a new television using *self-service on a computer*, with 24% selecting this channel.

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



ABOUT

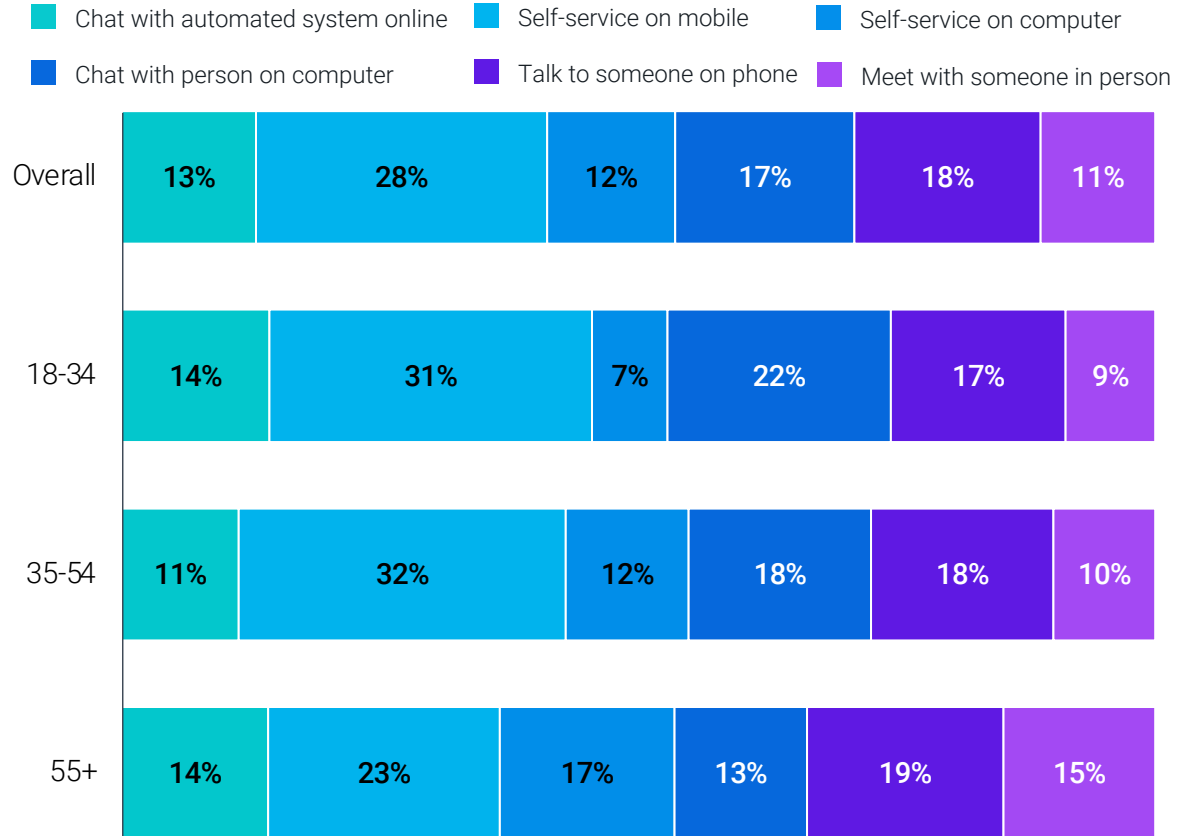
This chart shows the percentage of consumers in each country that would prefer to use each channel to purchase a new television.

Getting Order Status by Age

KEY TAKEAWAYS

- + More than one-quarter of consumers prefer to receive a status on their order using *self-service on mobile*, the strongest channel preference for this activity.
- + Thirteen percent of consumers would prefer to use chat with an automated system to get a status on their order, the greatest preference for this channel across all nine activities.
- + Younger consumers are 6 points less likely than consumers 55 or older to prefer meeting in person to receive order status.

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



ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to get status on an order they made.

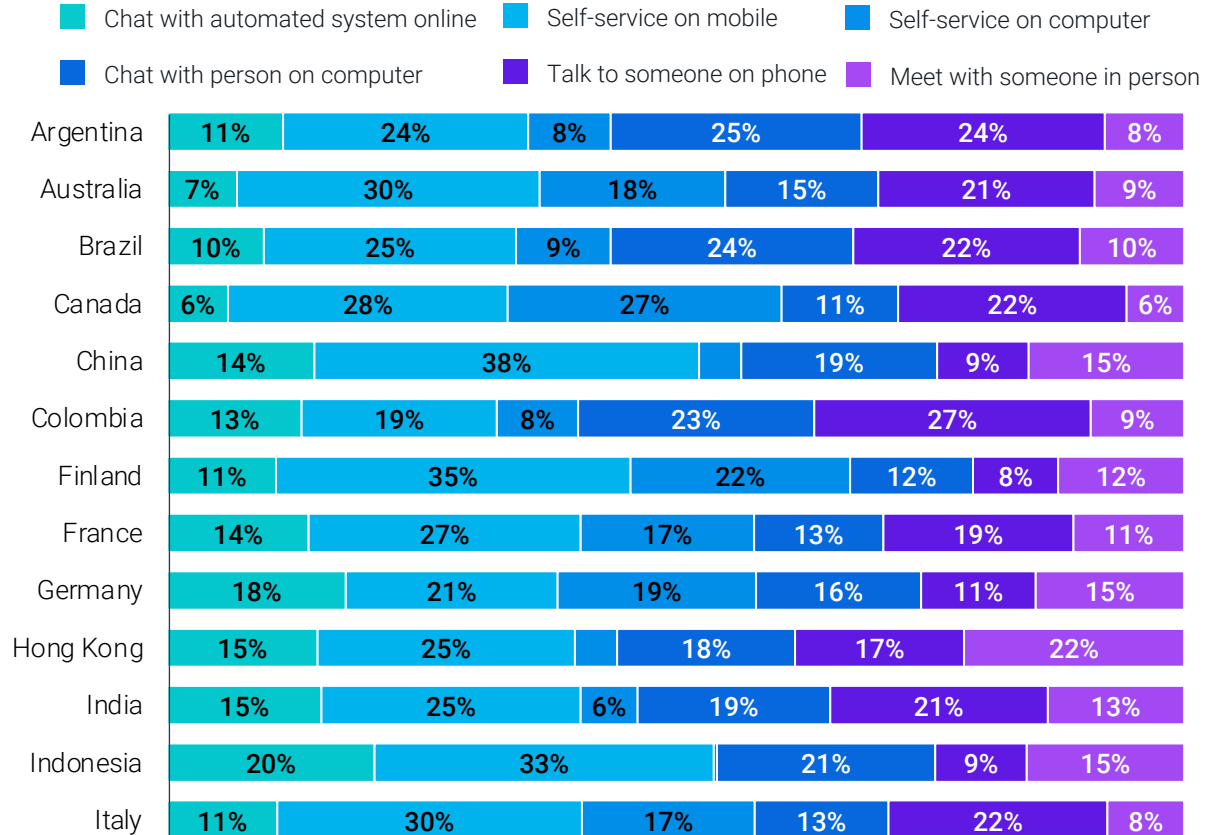
Data is only reported for age groups within each country with 100+ respondents.

Getting Order Status by Country (Part 1)

KEY TAKEAWAYS

- + Consumers in Hong Kong are the most likely to prefer to *meet with someone in person* to get order status (22%).
- + Chinese consumers have the strongest preference to use *self-service on mobile* to get order status, a propensity 19 points stronger than that of Colombian consumers, who are least likely to prefer this channel.

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



ABOUT

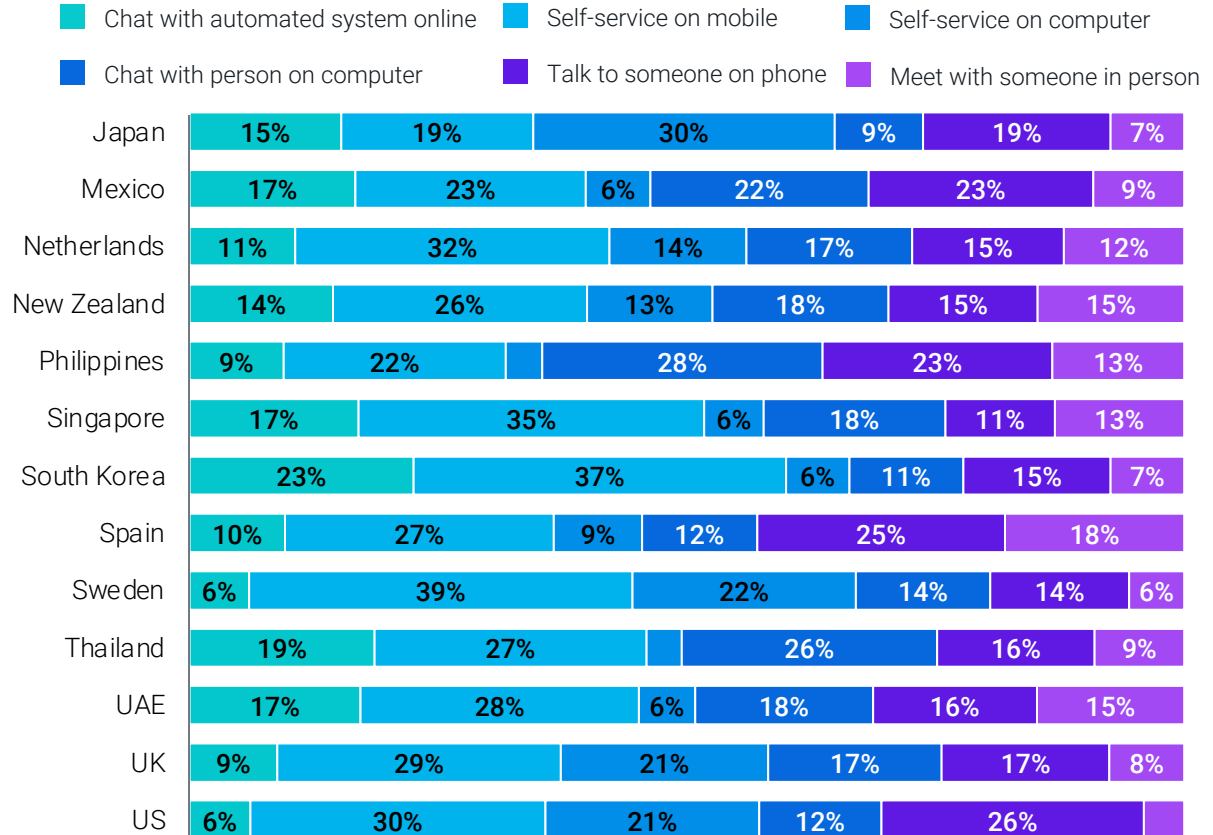
This chart shows the percentage of consumers in each country that would prefer to use each channel to get a status on an order they made.

Getting Order Status by Country (Part 2)

KEY TAKEAWAYS

- + South Korean consumers are most likely to prefer using *chat with an automated system* to get their order status, at 23%.
- + Thirty percent of Japanese consumers prefer using *self-service on computer* to get their order status, the strongest preference for this channel across all countries.

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



ABOUT

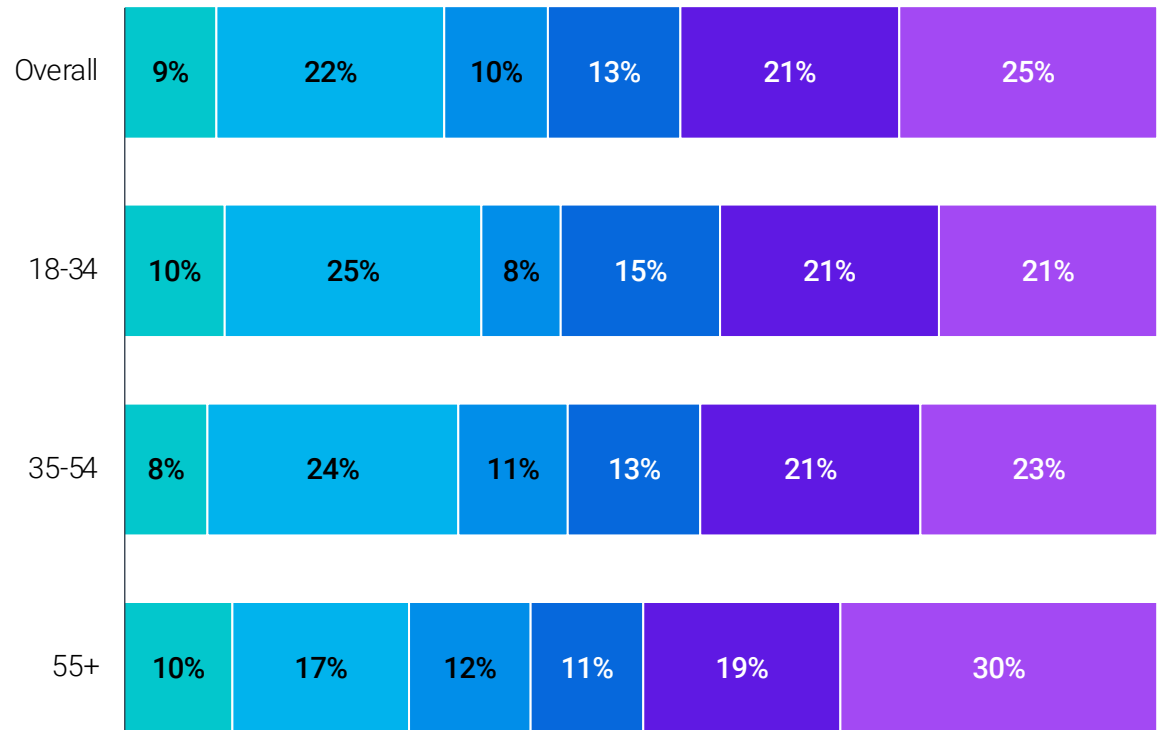
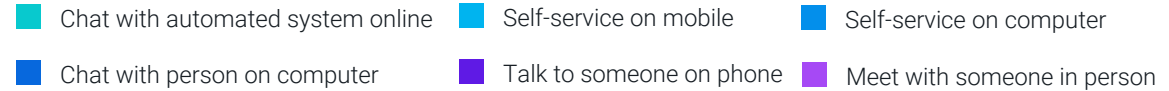
This chart shows the percentage of consumers in each country that would prefer to use each channel to get a status on an order they made.

Selecting a Phone Plan by Age

KEY TAKEAWAYS

- + Fifty-nine percent of consumers would prefer to use a human channel (*chat with person on computer, talk to someone on phone, meet with someone in person*) in order to select a mobile phone plan.
- + Older consumers are 9 points more likely than consumers 18-34 to prefer *meeting with someone in person* to select a phone plan, and 7 points more likely to do so than consumers ages 35-54.

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



ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to select a mobile phone plan.

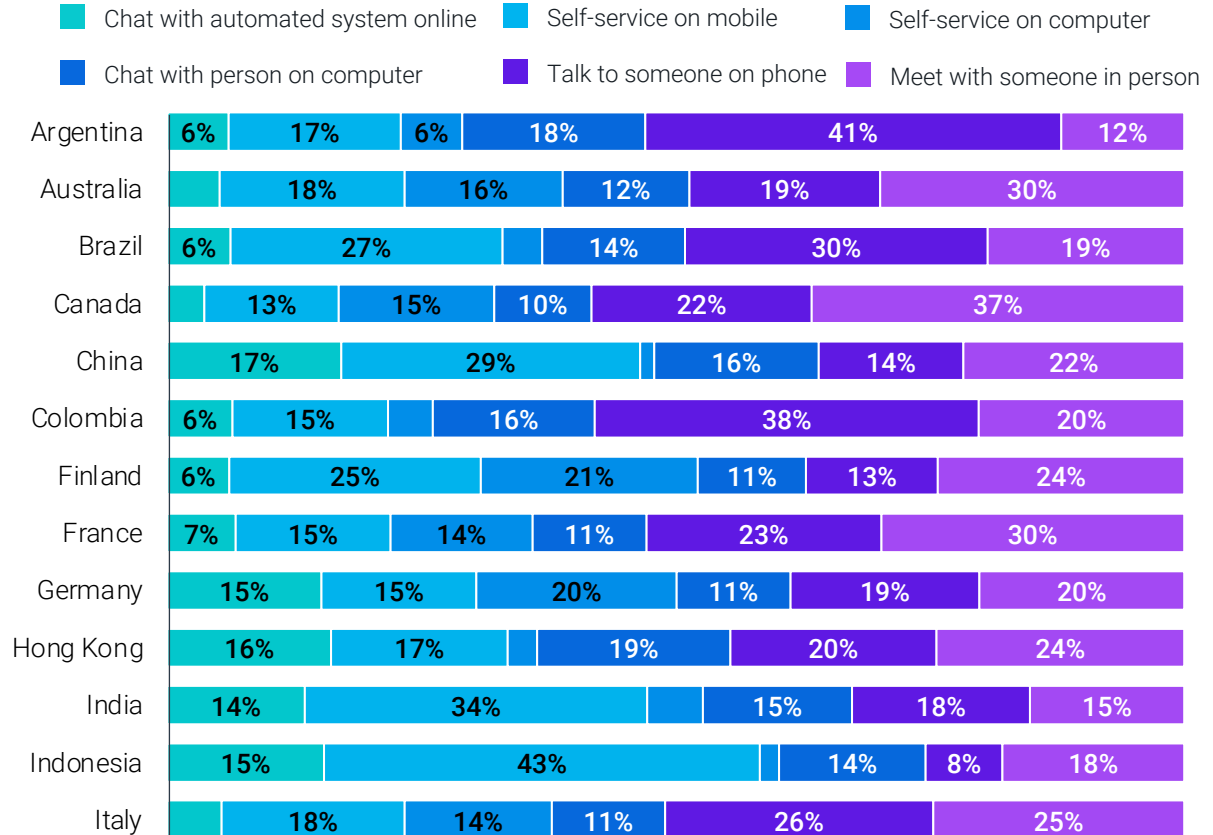
Data is only reported for age groups within each country with 100+ respondents.

Selecting a Phone Plan by Country (Part 1)

KEY TAKEAWAYS

- + Indonesian consumers are the most likely to use *self-service on mobile* to choose a new phone plan, at 43%.
- + Argentinian consumers have the least propensity to choose a new phone plan by meeting someone in person (12%).

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



ABOUT

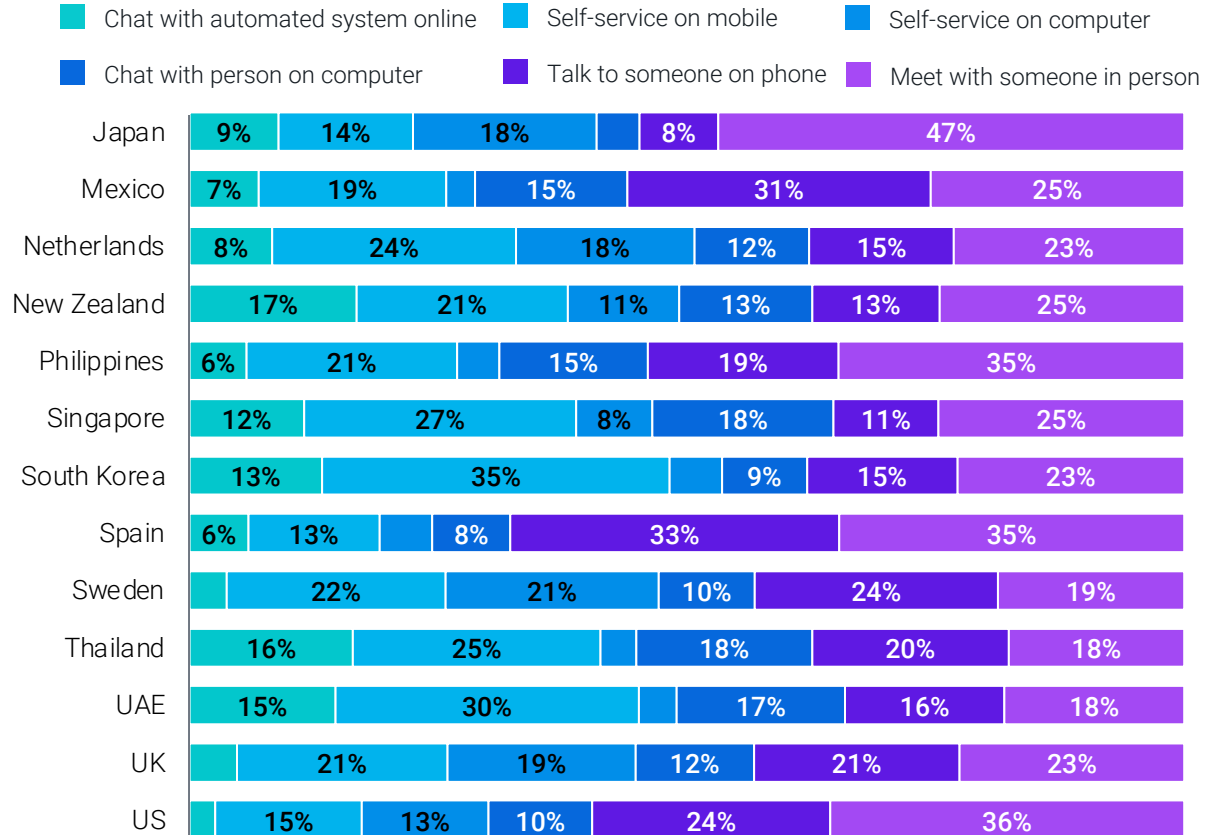
This chart shows the percentage of consumers in each country that would prefer to use each channel to select a mobile phone plan.

Selecting a Phone Plan by Country (Part 2)

KEY TAKEAWAYS

- + Three percent of US consumers prefer *chat with an automated system* to select a phone plan, the lowest propensity across all countries. New Zealanders and Chinese consumers are the most likely to use this channel, at 17% each.
- + Japanese consumers most prefer to select a phone plan by meeting in person, at 47%.

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to select a mobile phone plan.

Applying for a Bank Account by Age

KEY TAKEAWAYS

- + Over one-third of consumers would prefer to apply for a new bank account in person. Older consumers most prefer this channel, at 39%.
- + Consumers ages 35-54 are the least likely to want to apply for a new bank account using *chat with an automated system*.

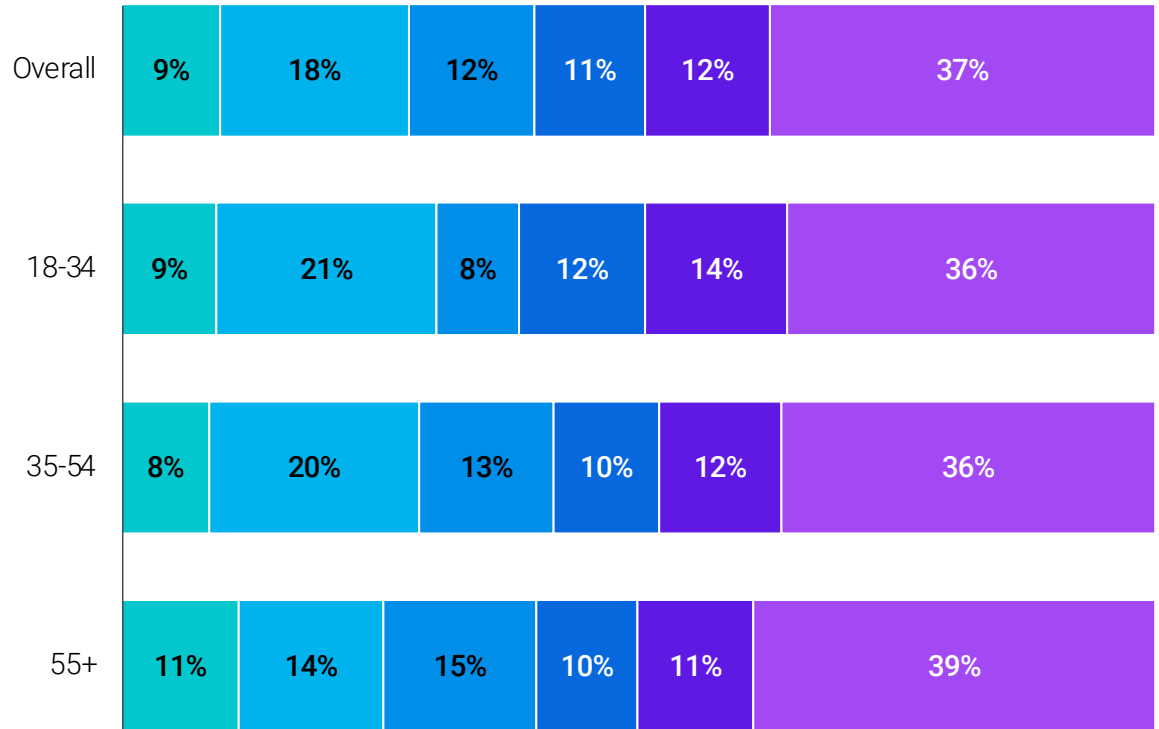
ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to apply for a new bank account.

Data is only reported for age groups within each country with 100+ respondents.

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

- Chat with automated system online
- Self-service on mobile
- Self-service on computer
- Chat with person on computer
- Talk to someone on phone
- Meet with someone in person



Applying for a Bank Account by Country (Part 1)

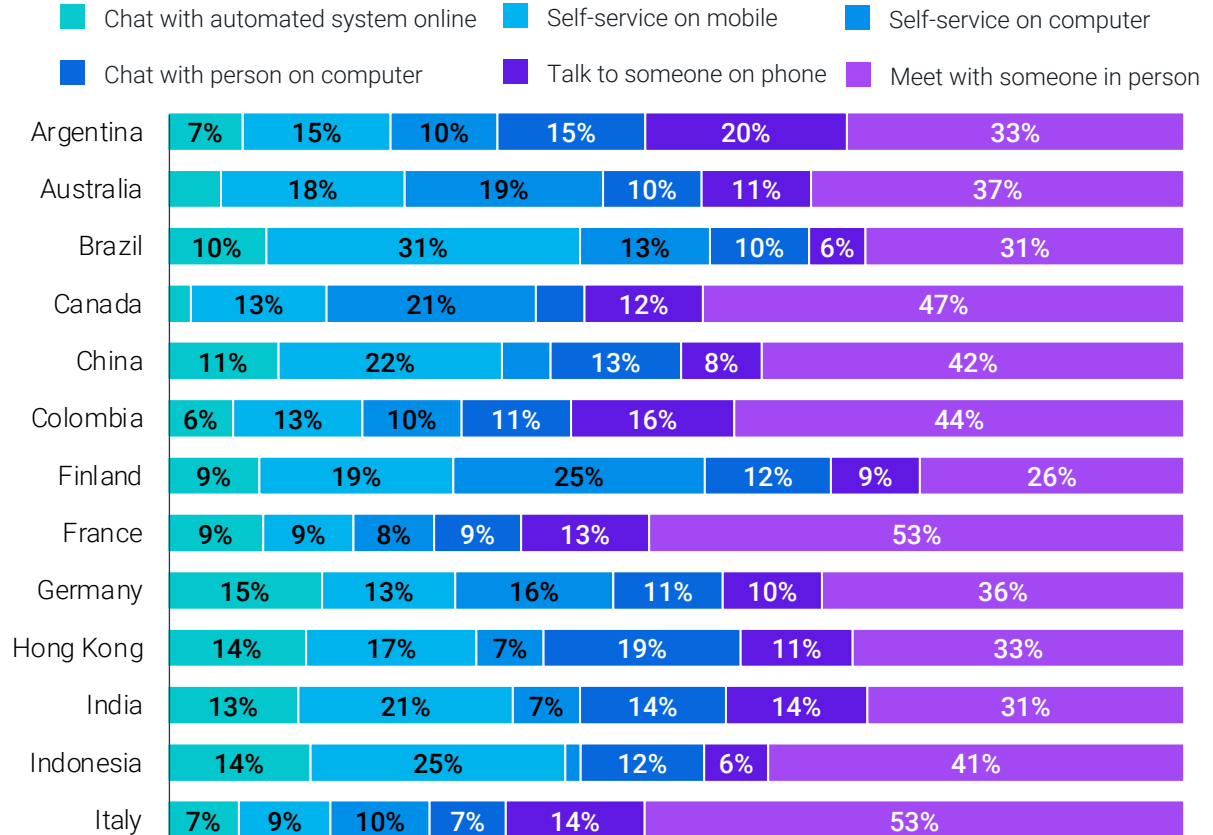
KEY TAKEAWAYS

- + Fifty-three percent of French and Italian consumers would prefer to *meet with someone in person* in order to apply for a bank account, the strongest preference across all countries.
- + Brazilian and Indonesian consumers are least likely to prefer applying for a bank account over the phone, at just 6%.

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to apply for a new bank account.

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



Applying for a Bank Account by Country (Part 2)

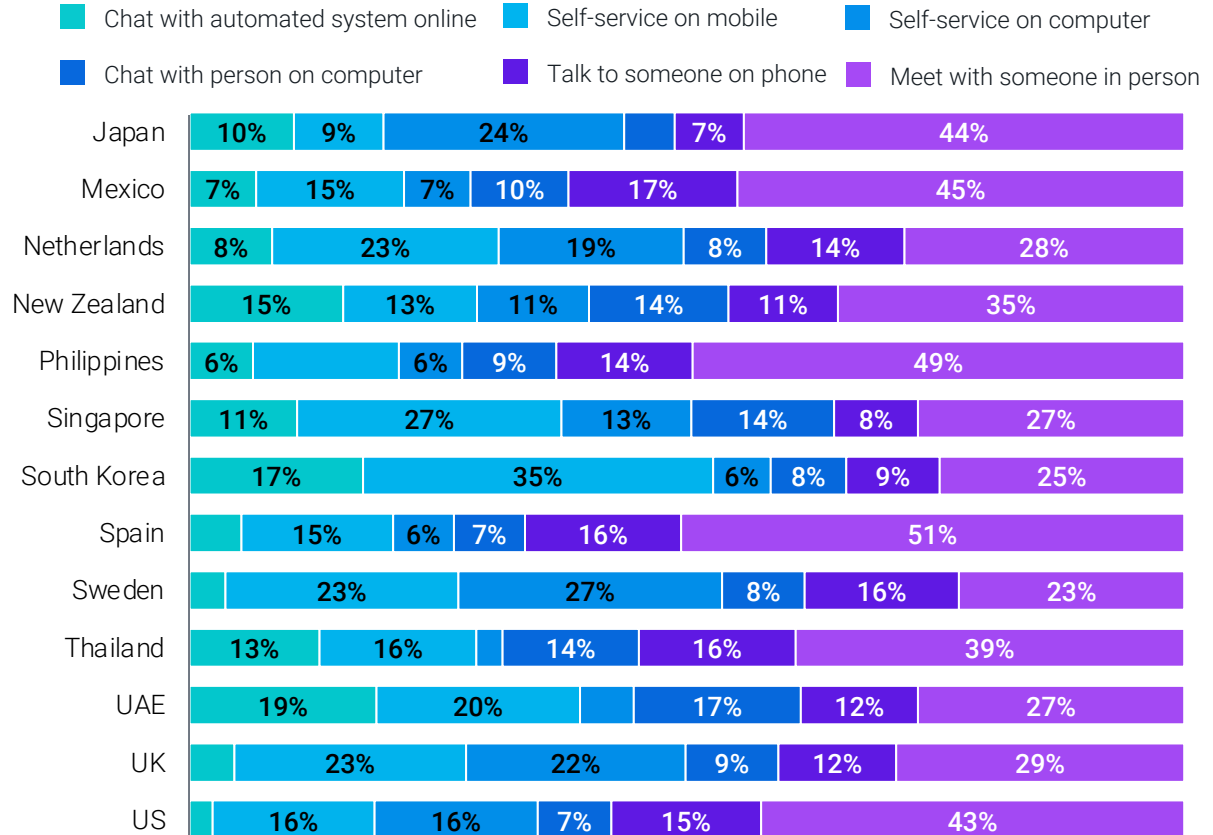
KEY TAKEAWAYS

- + South Korean consumers are the most likely to want to apply for a bank account using *self-service on mobile*, at 35%.
- + Emirati consumers are the most likely to use *chat with an automated system online* to apply for a new bank account, with 19% of respondents selecting this channel.

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to apply for a new bank account.

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



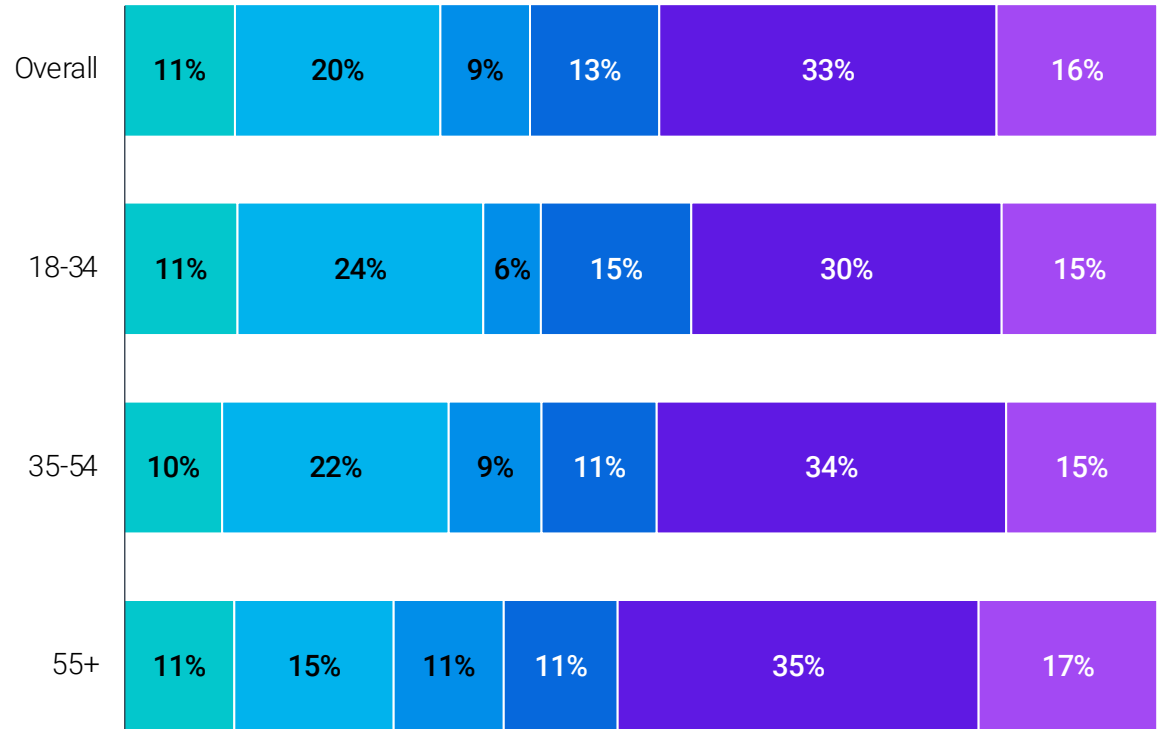
Scheduling a Medical Appointment by Age

KEY TAKEAWAYS

- + Globally, one-third of consumers most prefer to schedule a medical appointment over the phone. This preference is strongest amongst consumers ages 55 or older.
- + Younger consumers are the least likely to prefer scheduling a medical appointment using *self-service on a computer*, with just 6% preferring this option.

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

Chat with automated system online Self-service on mobile Self-service on computer
Chat with person on computer Talk to someone on phone Meet with someone in person



ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to schedule a medical appointment.

Data is only reported for age groups within each country with 100+ respondents.

Scheduling a Medical Appointment by Country (Part 1)

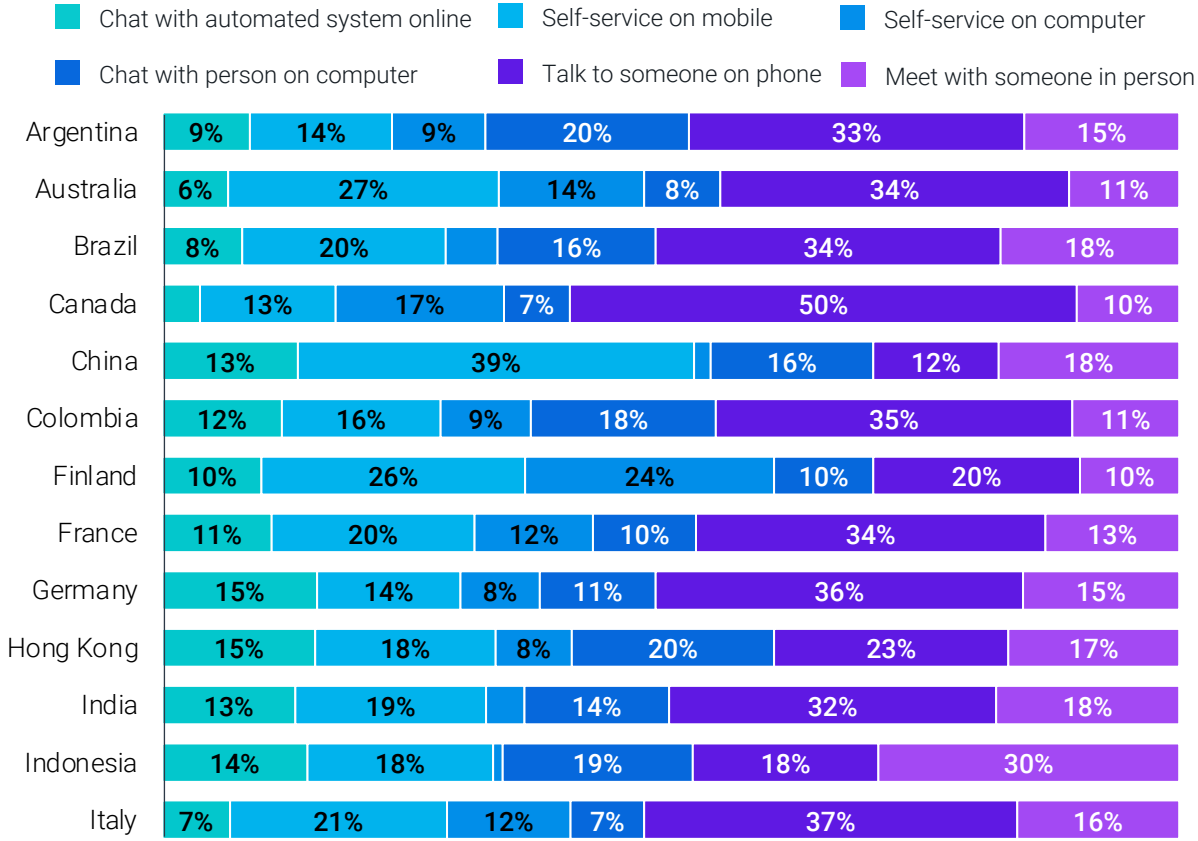
KEY TAKEAWAYS

- + Indonesian consumers have the highest propensity to schedule a medical appointment in person, at 30%.
- + Chinese consumers are the least likely to prefer scheduling a medical appointment over the phone, at 12%.

ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to schedule a medical appointment.

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



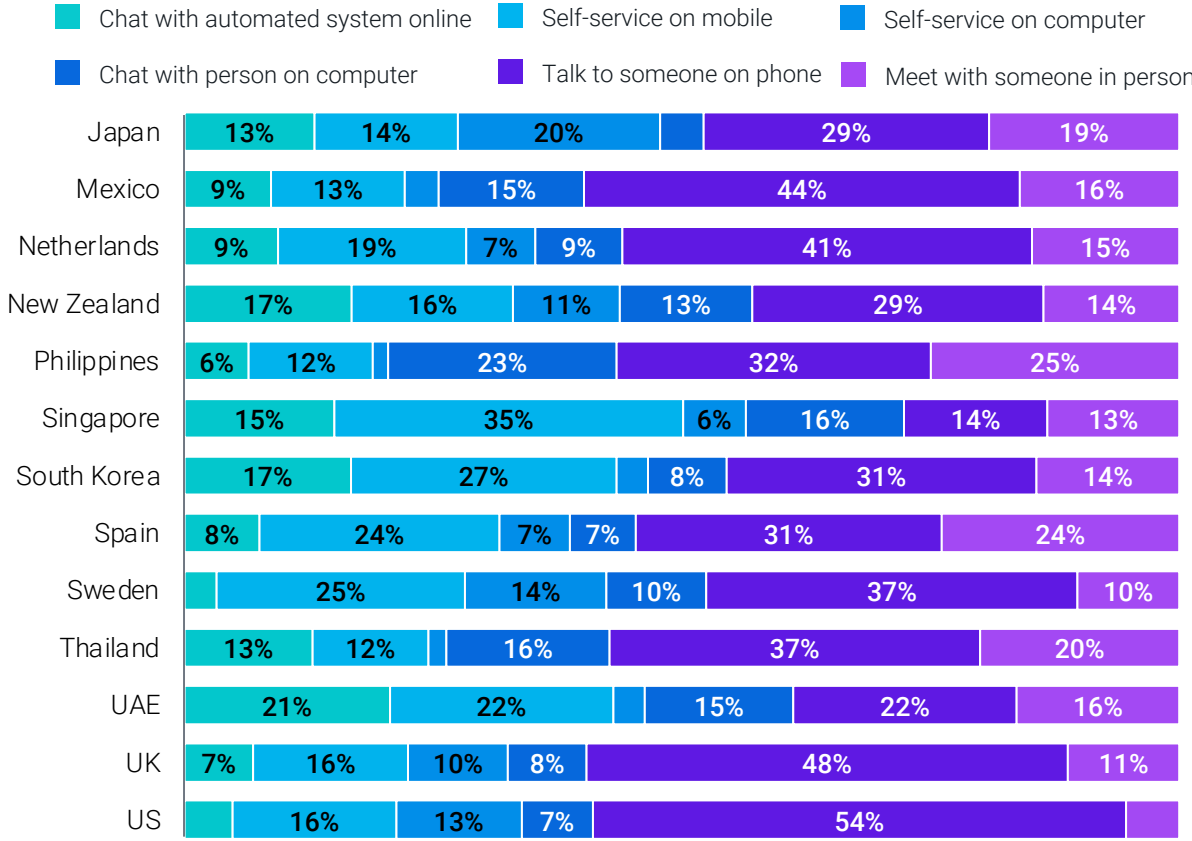
Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Scheduling a Medical Appointment by Country (Part 2)

KEY TAKEAWAYS

- + US consumers are the most likely to schedule a medical appointment over the phone, with 54% preferring this channel.
- + Just three percent of Swedish consumers prefer using *chat with an automated system* to schedule a medical appointment. Emirati consumers are the most likely to prefer this option, at 21%.

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to schedule a medical appointment.

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

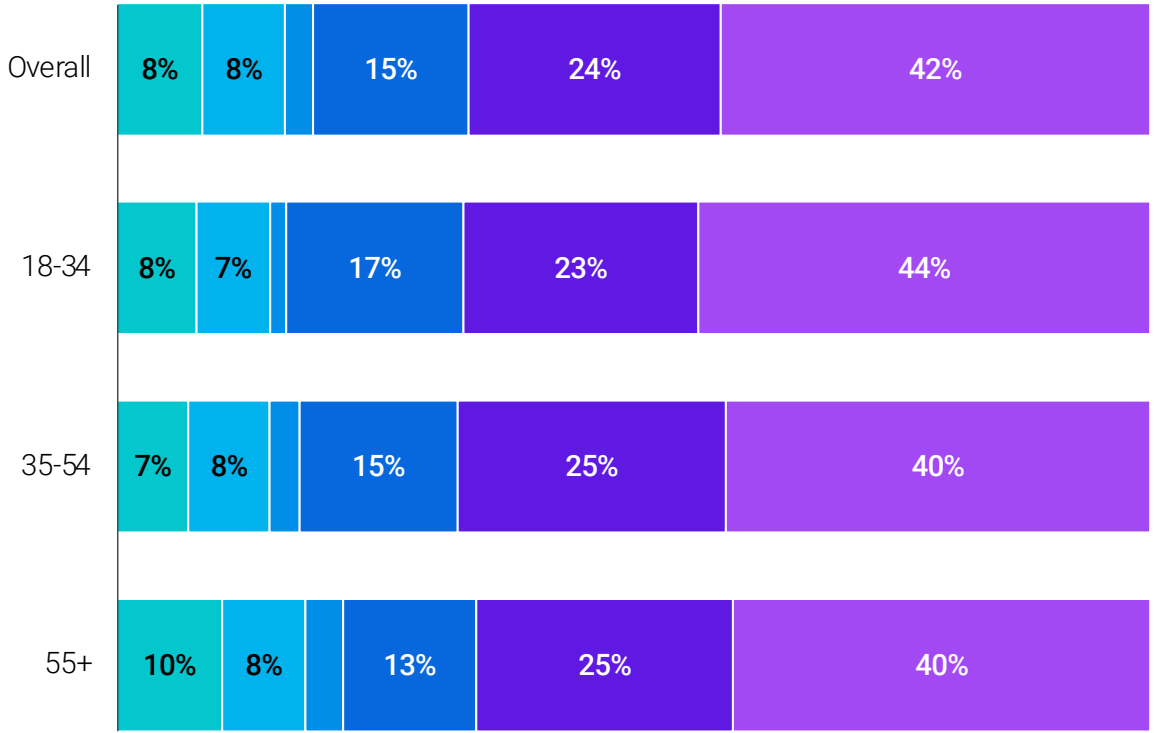
Receiving Medical Advice by Age

KEY TAKEAWAYS

+ Just nineteen percent of consumers globally prefer using a self-service channel (*chat with an automated system, self-service on mobile, self-service on computer*) to get medical advice. They are least likely to want to use *self-service on a computer*, at just 3%.

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

- Chat with automated system online
- Self-service on mobile
- Self-service on computer
- Chat with person on computer
- Talk to someone on phone
- Meet with someone in person



ABOUT

This chart shows the percentage of consumers of each age on average across all countries that would prefer to use each channel to schedule a medical appointment.

Data is only reported for age groups within each country with 100+ respondents.

Base: 28,400 consumers across 26 countries
 Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Receiving Medical Advice by Country

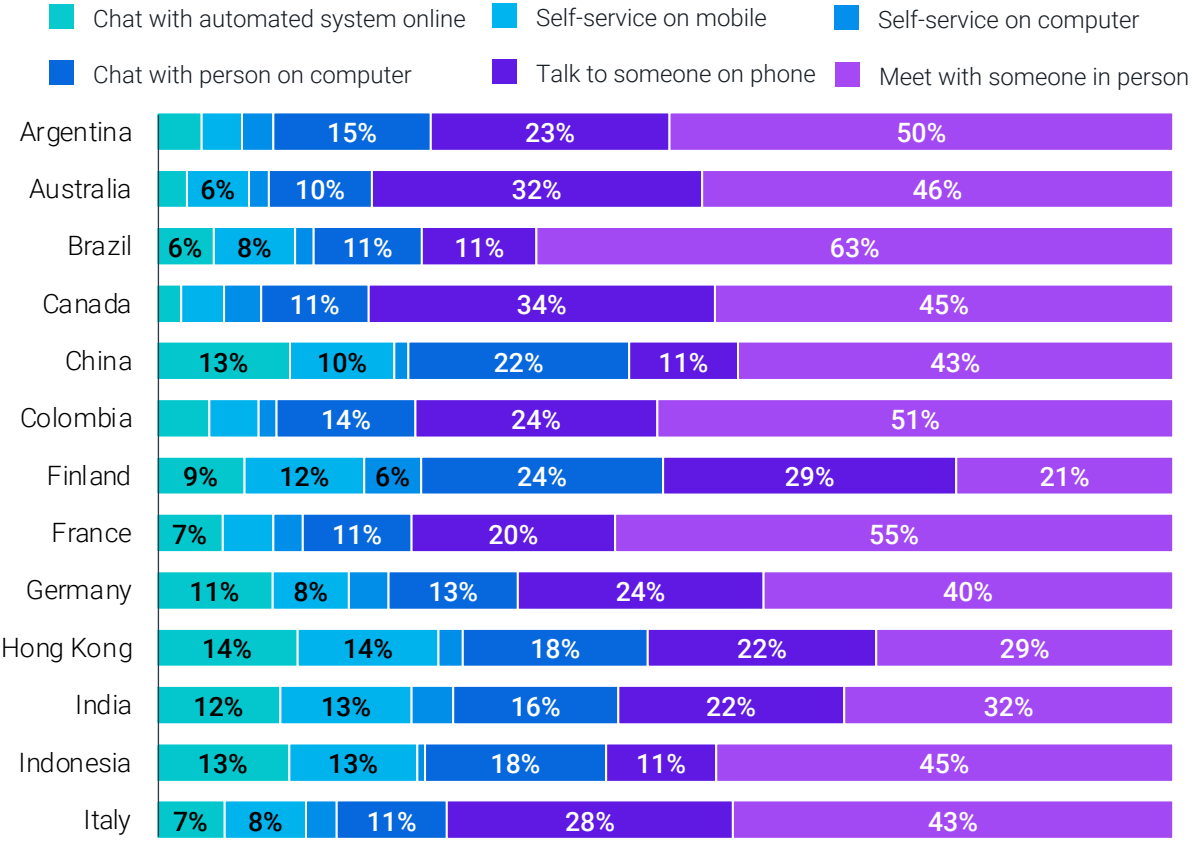
(Part 1)

KEY TAKEAWAYS

+ Brazilian consumers have the strongest preference to receive medical advice in person, at 63%. Finnish consumers are the least likely to prefer getting advice in person, at 21%.

+ Just one percent each of Chinese and Indonesian consumers most prefer to get medical advice using *self-service on computer*.

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to receive advice from a nurse or doctor about a minor issue.

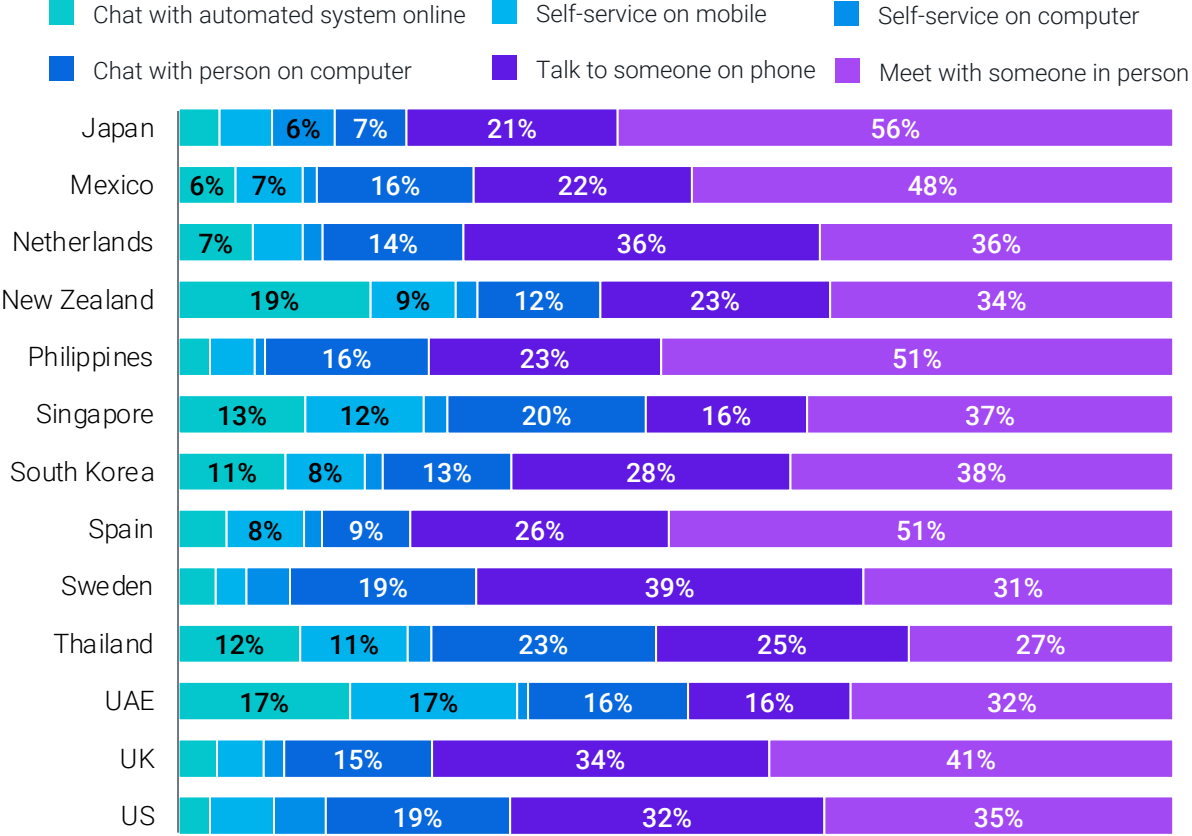
Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Receiving Medical Advice by Country (Part 2)

KEY TAKEAWAYS

- + Nineteen percent of New Zealander consumers would prefer to use *chat with an automated system* to get medical advice, the strongest preference for this channel.
- + Swedish consumers have the strongest propensity to receive medical advice over the phone, at 39%, followed by Dutch consumers (36%).

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



ABOUT

This chart shows the percentage of consumers in each country that would prefer to use each channel to receive advice from a nurse or doctor about a minor issue.

Base: 28,400 consumers across 26 countries
 Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

DATA CALCULATION

In **Figures 4, 7, 10, 13, 16, 19, 22, 25, and 28**, we calculated the 'Overall' preference for each channel for each activity by averaging the preference for each channel across all countries. We calculated the preference for each age group for each channel by averaging the preference for each channel across all countries' respective age groups for countries with 100+ responses in that age group.

For **Figures 5, 6, 8, 9, 11, 12, 14, 15, 17, 18, 20, 21, 23,24, 26, 27, 29, and 30**, we calculated the percentage preferring each channel by dividing the total number of respondents from each country selecting each channel for each activity by the total number of respondents from that country for the respective activity.

In **Figures 2 and 3**, we calculated the preference for each channel by country by averaging the preference for each channel across all nine activities as calculated for figures 5, 6, 8, 9, 11, 12, 14, 15, 17, 18, 20, 21, 23,24, 26, 27, 29, and 30.

In **Figure 1**, we calculated the preference for each channel by age group by averaging the preference for each channel across all nine activities as calculated for figures 4, 7, 10, 13, 16, 19, 22, 25, and 28.

In **Figure 1**, we calculated the 'Overall' preference for each channel across all activities by averaging the percentage preferring each channel across all countries, as calculated for figures 2 and 3.

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