TOPLINE & METHODOLOGY

Ipsos Customer Experience Survey

Conducted by Ipsos
A survey of the American general population (ages 18+)
Field dates: May 7-8, 2024
Base Size: 1,005

Annotated Questionnaire:

Q1. How important, if at all, is the availability of the following technology enhancements to your retail shopping?

	Click and collect, or curbside pickup	Cashierless stores, also known as checkout-free or just walk out stores	Self-checkout	Mobile payment	Mobile apps	Scan & Go	Same-day delivery	Robotic / autonomous delivery	Voice ordering	Video displays
Base	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**
Extremely important (10)	87	60	152	148	155	87	131	32	33	44
	9%	6%	15%	15%	15%	9%	13%	3%	3%	4%
9	60	35	85	118	99	58	89	27	33	37
	6%	4%	8%	12%	10%	6%	9%	3%	3%	4%
8	111	90	137	164	158	120	132	50	49	78
	11%	9%	14%	16%	16%	12%	13%	5%	5%	8%
7	120	68	148	114	145	129	103	66	53	106
	12%	7%	15%	11%	14%	13%	10%	7%	5%	11%
6	104	93	103	84	98	113	117	78	80	114
	10%	9%	10%	8%	10%	11%	12%	8%	8%	11%
5	134	92	106	85	104	129	137	112	131	169
	13%	9%	11%	8%	10%	13%	14%	11%	13%	17%
4	81	84	58	47	60	52	55	78	90	97
	8%	8%	6%	5%	6%	5%	6%	8%	9%	10%
3	75	80	50	54	50	57	59	86	82	66
	8%	8%	5%	5%	5%	6%	6%	9%	8%	7%
2	51	48	27	42	37	33	42	67	65	62
	5%	5%	3%	4%	4%	3%	4%	7%	6%	6%
Not at all important (1)	168	279	132	138	90	183	132	344	313	200
	17%	28%	13%	14%	9%	18%	13%	34%	31%	20%
Don't know / Never heard of this	15	76	7	11	10	43	7	65	76	32
	2%	8%	1%	1%	1%	4%	1%	6%	8%	3%

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Q2. In the last 6 months, which of the following scenarios have led you to interact with a Virtual Assistant online or within a mobile app in an e-Commerce/retail setting?

	Total
	Total
Base: All Respondents (unwtd)	**1005**
Attempting to contact a human associate	333
	33%
Resolving a service issue	246
	24%
Obtaining tracking information	194
	19%
Obtaining assistance with a purchase	166
	17%
Obtaining product information	164
	16%
Obtaining assistance with a return	163
	16%
None	394
	39%

Q3. When thinking about those e-Commerce/retail experiences, which of the following statements most represents how certain are you about recognizing if the chatbot is AI-powered vs. human-powered?

	Total
	Total
Base: All Answering (unwtd)	**594**
Base: All Answering (wtd)	**611**
It is clear and transparently communicated that the chatbot is AI-powered	220
	36%
I can tell it's an AI-powered chatbot by how it engages	304
	50%
I cannot tell if it's an AI-powered chatbot or a human, or when it transitions from bot to human	87
	14%

Q4. In an e-Commerce/retail setting, how important is it that a brand is transparent about their use of AI in the Virtual Assistant tool?

	Total
	Total
Base: All Answering (unwtd)	**594**
Base: All Answering (wtd)	**611**
Extremely important	225
	37%
Very important	219
	36%
Sometimes important	130
	21%
Rarely important	28
	5%

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Never important	10
	2%

Q5. In a e-Commerce/retail setting, please rank order the following attributes in terms of what contributes to a high quality experience with an AI-powered Virtual Assistant.

Rank 1 Summary

	Total
Base: All Answering (unwtd)	**594**
Base: All Answering (wtd)	**611**
Delivers the outcome I am seeking	276
	45%
Is passively available so that I can engage with it only when I need it	112
	18%
Is proactive and provides useful and relevant content and options	68
	11%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	62
	10%
Has a friendly tone and voice	59
	10%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	34
	6%

Rank 2 Summary

	Total
Base: All Answering (unwtd)	**594**
Base: All Answering (wtd)	**611**
Is proactive and provides useful and relevant content and options	156
	26%
Is passively available so that I can engage with it only when I need it	128
	21%
Delivers the outcome I am seeking	120
	20%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	98
	16%
Has a friendly tone and voice	63
	10%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	46
	7%

Rank 3 Summary

	Total
Base: All Answering (unwtd)	**594**
Base: All Answering (wtd)	**611**
Is proactive and provides useful and relevant content and options	144

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	24%
Is passively available so that I can engage with it only when I need it	131
	21%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	109
	18%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	95
	16%
Has a friendly tone and voice	67
	11%
Delivers the outcome I am seeking	65
	11%

Q6. In the last 6 months, which of the following scenarios have led you to interact with a Virtual Assistant online or within a mobile app in an Financial Services (banking/insurance) setting?

	Total
Base: All Respondents (unwtd)	**1005**
Base: All Respondents (wtd)	**1005**
Attempting to contact a human associate	227
	23%
Resolving a service issue	179
	18%
Obtaining product information	144
	14%
Obtaining tracking information	116
	12%
Obtaining assistance with a purchase	82
	8%
Obtaining assistance with a return	71
	7%
None	546
	54%

Q7. When thinking about those Financial Services experiences, which of the following statements most represents how certain are you about recognizing if the chatbot is AI-powered vs. human-powered?

	Total
Base: All Answering (unwtd)	**452**
Base: All Answering (wtd)	**459**
It is clear and transparently communicated that the chatbot is AI-powered	185
	40%
I can tell it's an AI-powered chatbot by how it engages	222
	48%
I cannot tell if it's an AI-powered chatbot or a human, or when it transitions from bot to human	52
	11%

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Q8. In a Financial Services setting, how important is it that a brand is transparent about their use of AI in the Virtual Assistant tool?

	Total
Base: All Answering (unwtd)	**452**
Base: All Answering (wtd)	**459**
Extremely important	190
	41%
Very important	145
	32%
Sometimes important	104
	23%
Rarely important	18
	4%
Never important	2
	*

Q9. In a Financial Services setting, please rank order the following attributes in terms of what contributes to a high quality experience with an AI-powered Virtual Assistant

Rank 1 Summary

	Total
Base: All Answering (unwtd)	**452**
Base: All Answering (wtd)	**459**
Delivers the outcome I am seeking	186
	41%
Is passively available so that I can engage with it only when I need it	81
	18%
Has a friendly tone and voice	58
	13%
Is proactive and provides useful and relevant content and options	58
	13%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	42
	9%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	34
	7%

Rank 2 Summary

	Total
Base: All Answering (unwtd)	**452**
Base: All Answering (wtd)	**459**
Is proactive and provides useful and relevant content and options	122
	27%
Delivers the outcome I am seeking	84
	18%
	78

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Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	17%
Is passively available so that I can engage with it only when I need it	77
	17%
Has a friendly tone and voice	57
	12%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	41
	9%

Rank 3 Summary

	Total
Base: All Answering (unwtd)	**452**
Base: All Answering (wtd)	**459**
Is proactive and provides useful and relevant content and options	92
	20%
Is passively available so that I can engage with it only when I need it	86
	19%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	78
	17%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	73
	16%
Has a friendly tone and voice	68
	15%
Delivers the outcome I am seeking	61
	13%

Q10. In the last 6 months, which of the following scenarios have led you to interact with a Virtual Assistant online or within a mobile app in a Telecommunications / Utilities setting?

	Total
Base: All Respondents (unwtd)	**1005**
Base: All Respondents (wtd)	**1005**
Attempting to contact a human associate	196
	20%
Resolving a service issue	193
	19%
Obtaining product information	121
	12%
Obtaining tracking information	87
	9%
Obtaining assistance with a purchase	86
	9%
Obtaining assistance with a return	59
	6%
None	584
	58%

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Q12. When thinking about those Telecommunications / Utilities experiences, which of the following statements most represents how certain are you about recognizing if the chatbot is AI-powered vs. human-powered?

	Total
Base: All Answering (unwtd)	**416**
Base: All Answering (wtd)	**421**
It is clear and transparently communicated that the chatbot is AI-powered	160
	38%
I can tell it's an AI-powered chatbot by how it engages	214
	51%
I cannot tell if it's an AI-powered chatbot or a human, or when it transitions from bot to human	46
	11%

Q13. In a Telecommunications / Utilities setting, how important is it that a brand is transparent about their use of AI in the Virtual Assistant tool?

	Total
Base: All Answering (unwtd)	**416**
Base: All Answering (wtd)	**421**
Extremely important	148
	35%
Very important	154
	37%
Sometimes important	98
	23%
Rarely important	16
	4%
Never important	5
	1%

Q14. In a Telecommunications / Utilities setting, please rank order the following attributes in terms of what contributes to a high quality experience with an AI-powered Virtual Assistant - Rank 1 Summary

	Total
Base: All Answering (unwtd)	**416**
Base: All Answering (wtd)	**421**
Delivers the outcome I am seeking	166
	39%
Is proactive and provides useful and relevant content and options	77
	18%
Is passively available so that I can engage with it only when I need it	64
	15%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	48
	11%

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Has a friendly tone and voice	39
	9%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	27
	6%

Rank 2 Summary

	Total
Base: All Answering (unwtd)	**416**
Base: All Answering (wtd)	**421**
Is proactive and provides useful and relevant content and options	105
	25%
Is passively available so that I can engage with it only when I need it	92
	22%
Delivers the outcome I am seeking	64
	15%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	63
	15%
Has a friendly tone and voice	59
	14%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	38
	9%

Rank 3 Summary

	Total
Base: All Answering (unwtd)	**416**
Base: All Answering (wtd)	**421**
Is proactive and provides useful and relevant content and options	105
	25%
Is passively available so that I can engage with it only when I need it	92
	22%
Delivers the outcome I am seeking	64
	15%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	63
	15%
Has a friendly tone and voice	59
	14%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	38
	9%

Q15. In the last 6 months, which of the following scenarios have led you to interact with a Virtual Assistant online or within a mobile app in a Travel & Hospitality setting?

	Total
Base: All Respondents (unwtd)	**1005**

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Base: All Respondents (wtd)	1005
Resolving a service issue	124
	12%
Attempting to contact a human associate	123
	12%
Obtaining product information	95
	9%
Obtaining assistance with a purchase	85
	8%
Obtaining tracking information	75
	7%
Obtaining assistance with a return	58
	6%
None	683
	68%

Q16. When thinking about those Travel & Hospitality experiences, which of the following statements most represents how certain are you about recognizing if the chatbot is AI-powered vs. human-powered?

	Total
Base: All Answering (unwtd)	**316**
Base: All Answering (wtd)	**322**
It is clear and transparently communicated that the chatbot is AI-powered	133
	41%
I can tell it's an AI-powered chatbot by how it engages	149
	46%
I cannot tell if it's an AI-powered chatbot or a human, or when it transitions from bot to human	40
	12%

Q17. In a Travel & Hospitality setting, how important is it that a brand is transparent about their use of AI in the Virtual Assistant tool?

	Total
Base: All Answering (unwtd)	**316**
Base: All Answering (wtd)	**322**
Extremely important	115
	36%
Very important	111
	34%
Sometimes important	76
	23%
Rarely important	19
	6%
Never important	1
	*

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Q18. In a Travel & Hospitality setting, please rank order the following attributes in terms of what contributes to a high quality experience with an AI-powered Virtual Assistant

Rank 1 Summary

	Total
Base: All Answering (unwtd)	**316**
Base: All Answering (wtd)	**322**
Delivers the outcome I am seeking	129
	40%
Has a friendly tone and voice	45
	14%
Is proactive and provides useful and relevant content and options	43
	13%
Is passively available so that I can engage with it only when I need it	38
	12%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	35
	11%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	32
	10%

Rank 2 Summary

	Total
Base: All Answering (unwtd)	**316**
Base: All Answering (wtd)	**322**
Is proactive and provides useful and relevant content and options	76
	24%
Is passively available so that I can engage with it only when I need it	68
	21%
Has a friendly tone and voice	51
	16%
Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	51
	16%
Delivers the outcome I am seeking	45
	14%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	32
	10%

Rank 3 Summary

	Total
Base: All Answering (unwtd)	**316**
Base: All Answering (wtd)	**322**
Is proactive and provides useful and relevant content and options	71
	22%
	70

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Offers assistance or "pops-up" when it can tell I am struggling to accomplish an objective	22%
Is passively available so that I can engage with it only when I need it	58
	18%
Is on-brand / branded (e.g. has a "personality" that matches the brand)	56
	17%
Has a friendly tone and voice	45
	14%
Delivers the outcome I am seeking	22
	7%

Q19. On a scale of 1-10, how important is each of the following when interacting with an AI-powered Virtual Assistant

	Operability - the Virtual Assistant operates efficiently and makes getting help easy	Learnability - it is easy to understand how the Virtual Assistant works	Fit - the Virtual Assistant does what I need it to do	Inspiration - the Virtual Assistant inspires me by delivering on the brand promise	Design - the Virtual Assistant is on-brand and appealing
Base: All Respondents (unwtd)	**1005**	**1005**	**1005**	**1005**	**1005**
Base: All Respondents (wtd)	**1005**	**1005**	**1005**	**1005**	**1005**
Extremely important (10)	301	207	355	88	85
	30%	21%	35%	9%	8%
9	142	87	141	81	68
	14%	9%	14%	8%	7%
8	174	184	154	135	116
	17%	18%	15%	13%	12%
7	131	170	117	136	187
	13%	17%	12%	14%	19%
6	94	128	78	144	167
	9%	13%	8%	14%	17%
5	81	106	74	150	156
	8%	11%	7%	15%	16%
4	25	37	32	81	76
	2%	4%	3%	8%	8%
3	12	27	17	60	45
	1%	3%	2%	6%	4%
2	9	10	5	29	20
	1%	1%	1%	3%	2%
Not at all important (1)	36	50	33	101	86
	4%	5%	3%	10%	9%

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Q20. On a scale of 1-10, how important is each of the following when interacting with an AI-powered Virtual Assistant.

	Enjoyment - the Virtual Assistant interaction is positive and helpful	Belonging - the Virtual Assistant feels personalized and welcoming to me as an individual	Certainty - the Virtual Assistant instills confidence that its support is accurate, secure and effective	Fair Treatment - the Virtual Assistant doesn't display any signs of bias or discrimination	Control - the Virtual Assistant follows commands and is not intrusive	Status - the Virtual Assistant makes me feel like a valued customer / user
Base: All Respondents (unwtd)	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**
Base: All Respondents (wtd)	**1005**	**1005**	**1005**	**1005**	**1005**	**1005**
Extremely important (10)	208	133	269	299	300	172
	21%	13%	27%	30%	30%	17%
9	118	79	153	113	127	104
	12%	8%	15%	11%	13%	10%
8	148	148	170	148	200	148
	15%	15%	17%	15%	20%	15%
7	177	155	139	122	132	156
	18%	15%	14%	12%	13%	16%
6	121	162	112	89	91	122
	12%	16%	11%	9%	9%	12%
5	118	142	71	119	73	143
	12%	14%	7%	12%	7%	14%
4	35	52	33	28	28	39
	3%	5%	3%	3%	3%	4%
3	17	34	11	23	15	32
	2%	3%	1%	2%	2%	3%
2	13	21	6	11	7	22
	1%	2%	1%	1%	1%	2%
Not at all important (1)	51	78	40	53	32	68
	5%	8%	4%	5%	3%	7%

Q21. Which of the following do you most agree with?

	Total
Base: All Respondents (unwtd)	**1005**
Base: All Respondents (wtd)	**1005**
An AI-powered virtual assistant should have a human-like personality	256
	25%
An AI-powered virtual assistant should clearly be robotic	292

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I don't have a strong opinion on the embodiment of an AI-powered Virtual Assistant	29%
	457
	45%

Q22. As generative AI is (GenAI) is adopted by companies and leveraged to improve the Virtual Assistant experience, which of the following statements best reflects your sentiment

	Total
Base: All Respondents (unwtd)	**1005**
Base: All Respondents (wtd)	**1005**
I believe it will make Virtual Assistants better and more useful	227
	23%
I am concerned about new biases in how Virtual Assistants behave	172
	17%
I still expect human support levels will exceed what an AI-powered Virtual Assistant can provide	388
	39%
I don't know enough about GenAI to have an opinion on how it will impact Virtual Assistants	218
	22%

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About the Study

This poll was conducted by Ipsos from May 7-8, 2024, using a sample of 1,005 adults age 18 or older. The sample for this study was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2021 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region and income.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.8 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,005, DEFF=1.5 adjusted Confidence Interval=+/- 5.3 percentage points)."

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About Ipsos

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