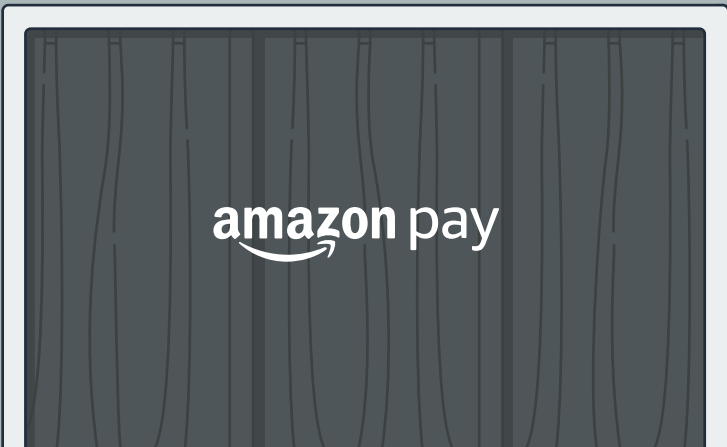


Doing business in a connected world

Customer insights on voice and connected commerce



About this ebook

Amazon Pay conducted a 25-minute double blind¹ online survey in April 2019 among 10,297 consumers in the United States, United Kingdom, Germany, France, Italy, Spain, Japan, and India. All respondents were third-party panelists (not limited to Amazon customers).

Survey respondents were consumers (with access to internet) who had made an online purchase at least once in the year preceding their survey start date. The survey covered the following topics: voice commerce, cross-channel experiences, attitudes towards customer experience, security/trust, and innovation. This ebook summarizes the key findings from this research.



¹ Amazon Pay did not know the identity of the respondents and the respondents did not know Amazon Pay was the research sponsor.

First look

Connectivity has become more pervasive and diversified than ever before, thanks to the increasing ubiquity of mobile devices, as well as the rapid adoption of voice services, smart devices, and virtual and augmented reality. This increased connectivity is changing the shopping habits of a new generation of consumers, now accustomed to buying items instantly, with a swipe, click, or a voice command.

The days have long passed when product purchases involved extensive planning, research, and visits to multiple stores. In addition to retail stores, today's consumers have a plethora of channels to discover, research, and buy, including ecommerce (online), m-commerce (mobile), and now, voice commerce. Literally, it seems like they can buy whatever they want, whenever, wherever, and however they want.

This shift towards multi-channel shopping is category agnostic; it does not matter if consumers are buying groceries or books or event tickets. The multi-channel shopping journey itself can take multiple paths. Consumers could complete their entire shopping journey in any one of the channels, or they could use multiple channels within a single shopping journey, thus making it a cross-channel experience.

What unites the use of all these purchase channels? The consumer's desire for an effortless and frictionless experience across all channels. Spoiled for choice by the sheer number of sellers and access to those sellers, consumers have the upper hand, and they know it. Businesses cannot take consumer loyalty for granted anymore. It has to be earned and nurtured.

Consumers have come to expect newer, improved experiences that employ innovative technologies. Businesses cannot afford to play catch-up anymore when it comes to adopting new technologies. With some businesses employing the 'wait and watch' approach towards voice and others eager to jump on the bandwagon, this ebook answers the question – "Is voice a passing fad or a long-term opportunity?"



Consumers could use multiple channels within a single shopping journey.

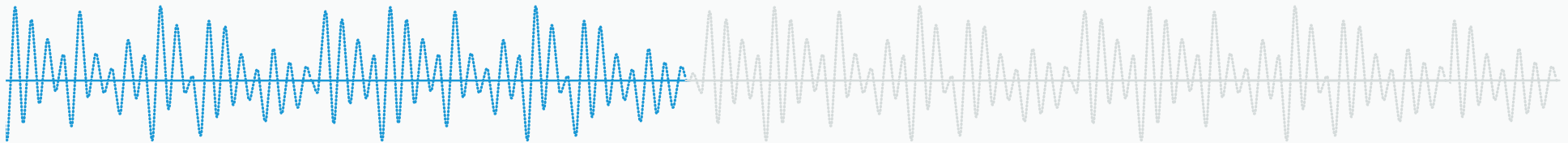
Voices are getting louder

We believe cloud-based voice services represent the next era of commerce after physical stores, ecommerce, and m-commerce. Interestingly, this next-generation commerce channel also takes consumers back to a simpler time, when all they had to do was ask for the products and services they needed. No typing or swiping, just good old-fashioned conversation, with one significant difference – consumers are talking to a voice service that is becoming smarter by the day.

Consumers find the experience to be simple yet novel with 44% indicating that they are likely to use voice services in at least some part of their shopping journey in the next three years.² This adoption rate, for a still nascent technology, proves that businesses should not just consider voice but embrace it to address the next level of consumer expectation.

² We define shopping journey as comprising four phases: discovery/awareness, research/evaluation, purchase, and post-purchase.

Adoption of voice in the shopping journey in the next three years



44%

Percent who indicated that they are somewhat or very likely to use voice services in some phase of their shopping journey in the next three years.

Survey question: In three years, how likely are you to use voice services in the below phases of the shopping journey?

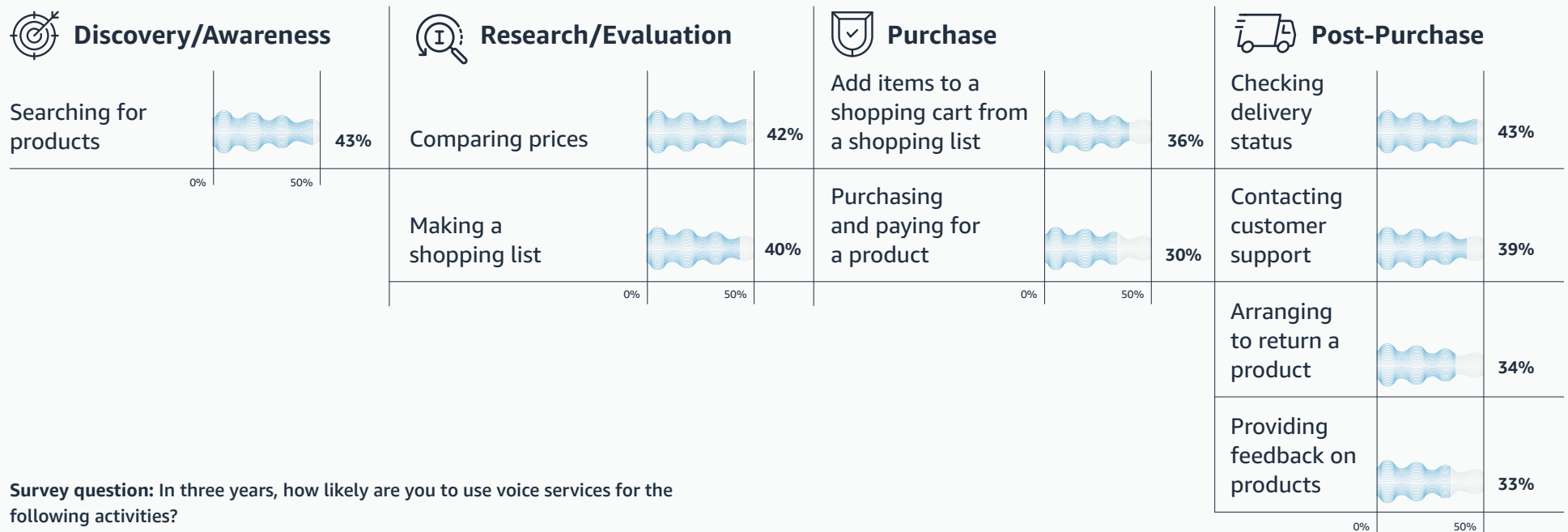
Voice is more than just about tracking orders

Consumer interest in voice commerce is not limited to the point of purchase. In fact, they express interest in using voice services across all phases of the shopping journey. The top two activities are product searches (research phase) and delivery notifications (post-purchase phase). Comparing prices, making a shopping list, contacting customer support, and adding items to the shopping cart comprise the next tier and are closely bunched together. Arranging product returns and offering product feedback round out the list.

While product searches and delivery notifications top the list, the likely adoption of voice in other phases of the journey proves that consumers are already thinking broadly about voice shopping. Businesses can begin developing a voice skill around the most common use-cases in the shopping journey; however, they will eventually need to build one for all phases.

Adoption of voice in every step of the shopping journey in the next three years

Percent who indicated that they are somewhat or very likely to use voice services for activities in the shopping journey in the next three years



Survey question: In three years, how likely are you to use voice services for the following activities?

Need for speed

The top two drivers of voice commerce are ease-of-use and speed. We speak two times faster than we type. Through this speed, voice facilitates convenience and satiates consumers' desire to get more by doing less. This 'doing less' aspect is preferred by consumers because it frees them to pursue other activities. While it is possible to create a variety of experiences using voice, businesses should begin with skills and features that are going to make consumers' lives easier, such as developing answers to frequently asked questions, tracking packages, or offering product details.

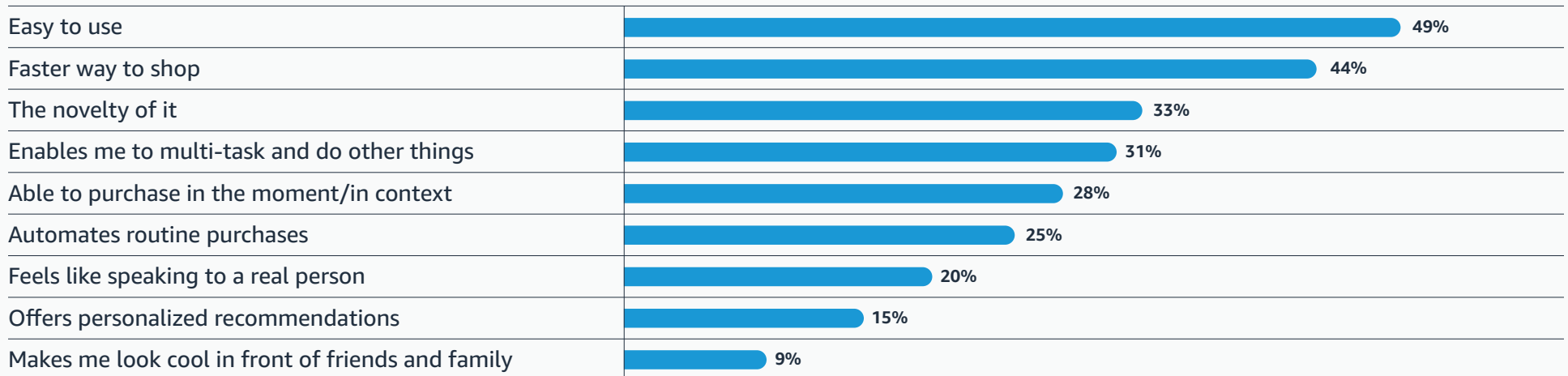
Additionally, almost one in three consumers likes the in-context/in-the-moment aspect of voice, which allows them to move quickly

from the 'desire' and 'think' phase to the 'purchase' phase. As businesses consider voice strategies, they should focus on events in the life of a consumer that could trigger them to pursue a shopping journey e.g., asking consumers if they want to order gifts for their family before Christmas, asking if they want to order movie tickets on a Friday night, etc. This contextual trigger is more likely to result in the consumer engaging with brands through the voice channel.

With the buzz around voice, one in three consumers will also try it for its novelty. While this novelty might motivate trial, businesses need to execute on a voice skill that improves consumer experience if they want to increase use of this channel.

Reasons for using voice commerce currently/in future

Percent who ranked these options as one of their top five reasons



Survey question: Please pick up to five reasons why you use/you will use voice services for purchasing products/services.

Voice is an equal opportunity channel

Consumers who are willing to use voice in some part of their shopping journey do not differentiate its use based on product or service category. Instead, they are willing to try voice services to purchase products and services across all categories. Entertainment in the form of music and DVDs/Blu-rays are the most common product category use cases, followed by groceries, books, and clothing. Online food ordering/delivery services and digital/streaming music/TV shows are the top two use cases for voice in the service category. Hotel and travel booking round out the top five.

To begin using voice, businesses can target habitual purchases that consumers order on a regular basis, such as subscriptions, pet food, detergent, etc., before expanding to offer all their products and services. Businesses can identify the items that their customers order regularly and make it easy for them to reorder via voice. Such a start allows businesses to hone their voice execution before expanding their offerings. Refer to pages seven and eight for the data.



Businesses can target habitual purchases that consumers order on a regular basis.

Likelihood to purchase from these categories using voice services in three years

Percent who rated somewhat or very likely (among those who said they'll use voice services in some part of their shopping journey in three years)



Music

60%



Movies or TV shows

57%



Groceries

56%



Books or textbooks

54%



Clothing, shoes,
or accessories

54%



Home, kitchen, or
garden items

52%



Consumer electronics
or personal computers

52%



Beauty, health or
personal care items

51%



Toys, games,
or video games

45%



Sports and
outdoor equipment

43%



Pet supplies

40%



Automotive

37%



Baby clothing, baby
food, and baby supplies

37%

Survey question: In three years, how likely are you to use voice services to purchase these items?

Likelihood to purchase from these categories using voice services in three years

Percent who rated somewhat or very likely (among those who said they'll use voice services in some part of their shopping journey in three years)



Online Food ordering/Delivery services

61%



Digital or streaming music

61%



Digital or streaming movies or TV shows

59%



Hotel/Stay booking

57%



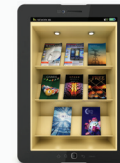
Travel ticket booking

56%



Event tickets

55%



Digital books or textbooks

52%



Ride sharing/Cab services

50%



Digital or streaming video games

47%



Car-rental

45%



Subscriptions

44%

Survey question: In three years, how likely are you to use voice services to purchase the following?

Voice is not just for shopping

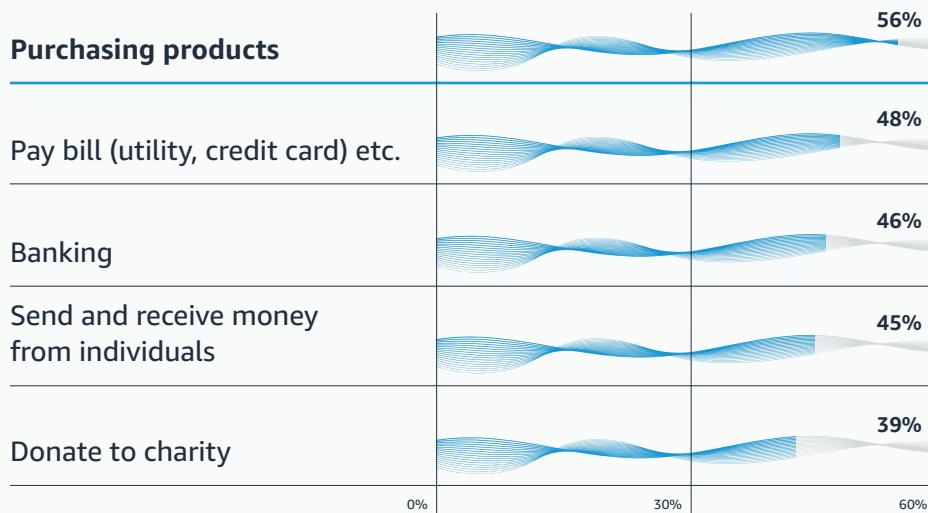
One in three consumers willing to purchase products using voice services implies that they expect this channel to evolve to a point where they trust it enough to pursue a transaction. This trust extends to the use of voice services for other financial activities such as paying bills (26%), banking (26%), sending and receiving money from individuals (22%), and donating to charities (19%). The propensity to use voice for these activities almost doubles among those who own smart speakers today

with 48%, 46%, 45%, and 39% indicating that they are likely to use voice services for paying bills, banking, sending and receiving money from individuals, and donating to charities respectively. All these activities include some exchange of money. This proves that voice's reach goes beyond commerce into the realm of financial management. Businesses must realize that when they execute a voice skill, they are being compared to peers not just in their category but outside as well.

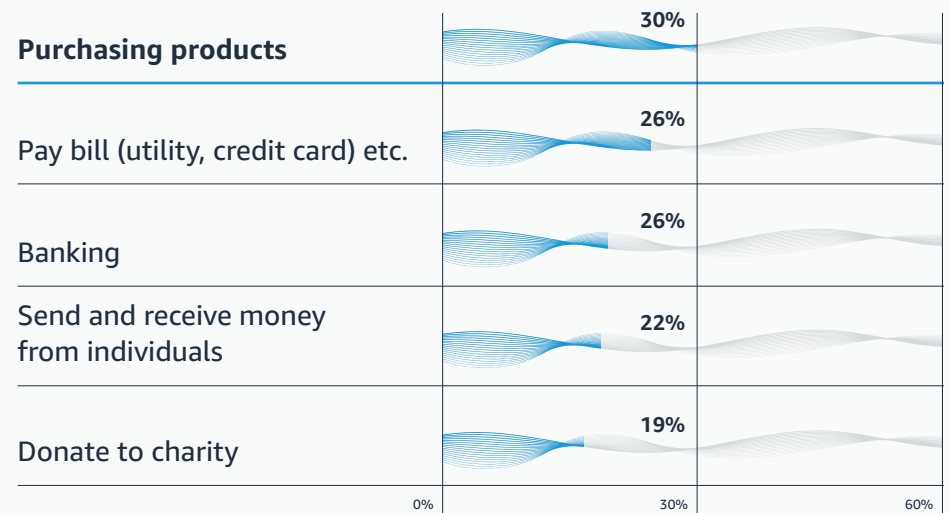
Adoption of voice for commerce and other financial activities

Percent who indicated that they are somewhat or very likely to use voice services for these activities in the next three years

Owners of smart speakers



General population



Survey question: In three years, how likely are you to use voice services for the following activities?

Voice as an enhancement, not a replacement

Whenever a technological advance gains traction, we assume that the new technology will always replace an old one. However, the commerce space has proved that is not always the case. Since the advent of digital technologies, consumers have incrementally adopted channels such as ecommerce and m-commerce to complement (but not replace) their experience at stores. All these channels have grown together since then.

This growth in all channels is set to continue with the addition of voice. One in five consumers indicate that the proportion of their purchases through voice will increase in the next three years. 59% and 11% indicate the same for mobile and physical stores respectively. For relative comparison, the same number for online and physical stores is 59% and 11% respectively.

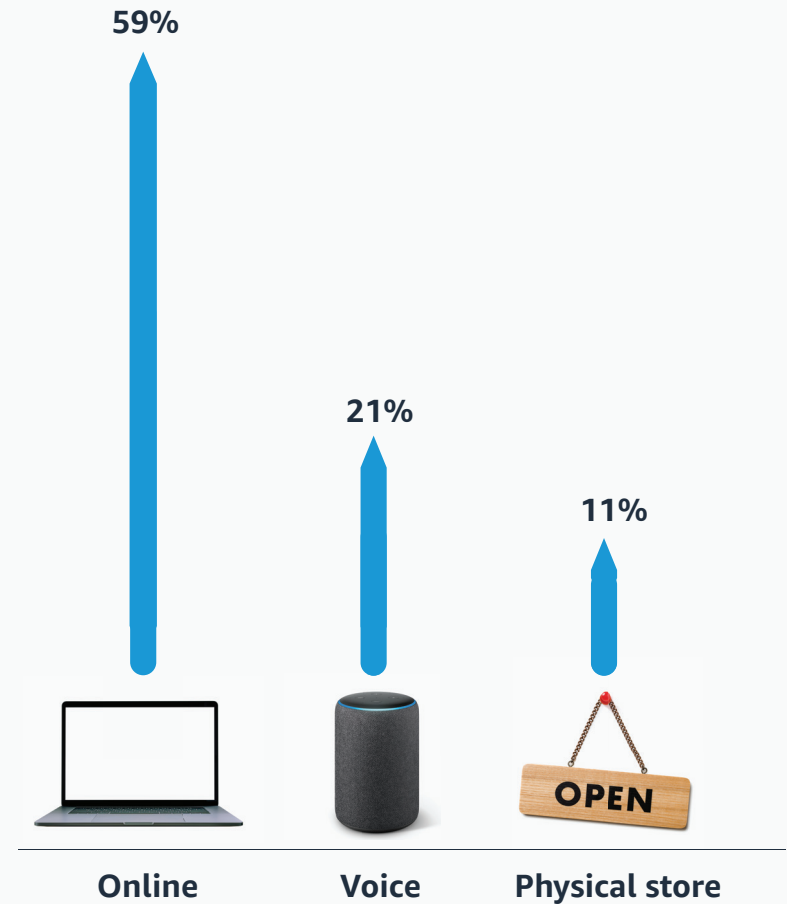
Don't expect voice to replace other channels; instead think of how voice will complement your existing channels. Businesses should devise strategies to ensure that consumers are able to access products and services through the channels of their choice, as well as enabling those channels work together effectively to improve consumer experience.

Consider scenarios where customers prefer to use voice to get something done because they are in the middle of an activity, such as cooking or driving, and cannot use the phone. Or, perhaps they're in a place where the phone screen is not visible. Which order-related actions do shoppers want to accomplish in a hands-free and eyes-free environment?

One good way to identify these opportunities is by focusing on the top reasons customers may call the customer service line. Businesses can add value to the experience and save customers time by addressing common questions like "Is my size in stock" or requests, such as "Send the newest black boots to my phone".

Consumers expecting a growth in the proportion of purchases from each channel

Percent who rated increase marginally or significantly when asked how their proportion of purchases from these channels will change in the next three years



Survey question: In three years, how will the proportion of your purchases through these channels change?

Prepare for the connected consumer

To facilitate cross-channel experiences, businesses should incorporate voice as an integral part of their overall commerce strategy. Consumers are signaling an embrace of multi-channel experiences within the shopping journey, with 42% likely to be involved in one that spans multiple channels in the next three years. In fact, today 39% are quite comfortable with starting their journey in one channel and ending it in another.

Among those who will use multiple channels for shopping, one in five state that they will start a journey on voice and end it online or at a physical store. About half will recommend a brand if it offers a seamless cross-channel experience.

Consumers today are disappointed in companies' ability to deliver cross-channel experiences, with just more than half who are satisfied with the ability of brands today to do so. The failure to deliver on continuous cross-channel experiences (including voice) can negatively impact customer experience. Seven in 10 consumers will switch from a seller if it does not offer a good customer experience. Fifty-nine percent will not only switch but also be vocal, as they will share their unpleasant experience with friends and family.

Businesses owe it to their customers to provide an effortless commerce experience; recognizing them across channels and helping them continue their shopping journey from wherever they left off. The only way to do this is by considering voice not in isolation, but as an integral part of a business' commerce strategy.

To start, voice skills can be as simple as "Check the status of my web order" with features like Alexa Delivery notifications or "Add something to my wish list" so that consumers can purchase item later on their phone or the web. Businesses can then build other complex cross-channel experiences that involve voice. Refer to pages 12-13 for the data.



Consider voice not in isolation, but as an integral part of a business' commerce strategy.

Likelihood to switch channels within a shopping journey in the next three years

Percent rating somewhat likely or very likely

42%

Survey question: In three years, how likely are you to be involved in a shopping journey that spans multiple channels where you start shopping in one channel but complete the purchase in another?

Attitudes towards cross-channel shopping

Percent who rated somewhat agree or strongly agree to this statement

 **49%**

will recommend a seller if they offer a seamless and continuous customer experience across all channels

 **39%**

are comfortable starting the purchase process in one channel and completing it in an entirely different channel

Survey question: How strongly do you agree with the following statements?

Likelihood to switch from voice to another channel within a shopping journey in three years

Percent rating somewhat likely or very likely



Attitudes towards customer experience

Percent rating somewhat agree or strongly agree to these statements



Survey question: How strongly do you agree with the following statements?

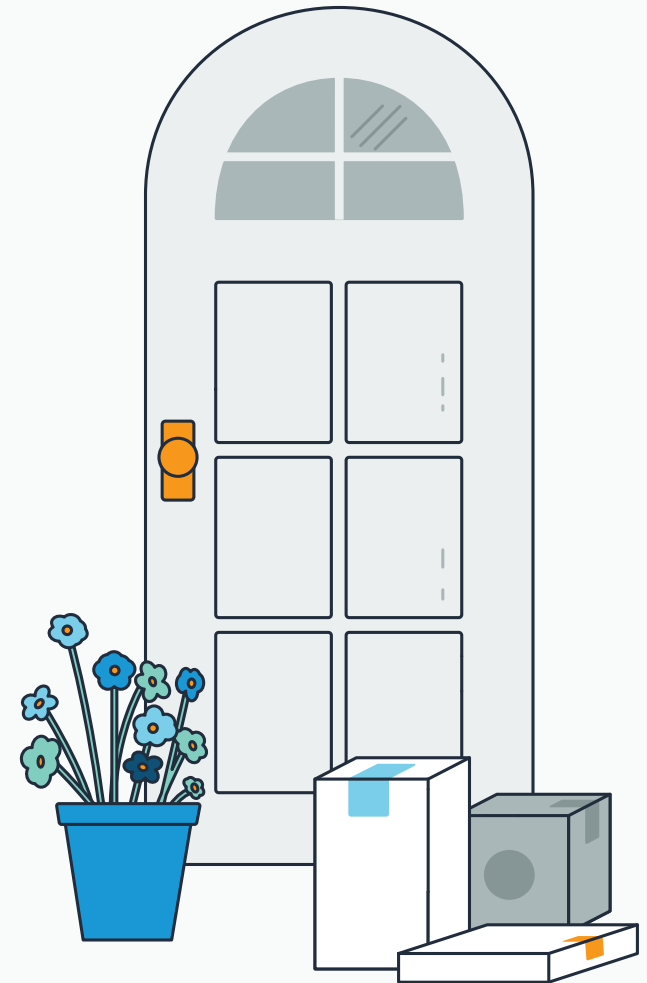
Satisfaction with companies' ability today to offer a seamless and continuous shopping experience

Percent rating somewhat satisfied or very satisfied



52%

Survey question: How satisfied are you today with companies offering a seamless and continuous customer shopping experience across channels?



Trust is a necessity, not an option

As businesses expand into new channels to improve consumer experience, it is important that they do not lose sight of trust. It is not trust 'or' convenience; it is trust 'and' convenience.

Trust and the security of personal information, is the most important attribute when consumers shop in any channel (85% rate it as somewhat or very important).

The biggest measure that will boost confidence in a business is if it guarantees that it will not share consumer information without permission. Seeking consent to use consumer information; a strong privacy policy; transparency about how consumer information is being used; and proactively communicating a security breach round out the top five. The downside of not safeguarding consumer information is higher than the upside of doing so. Eight out of ten consumers will switch from a brand if they do not trust it to keep their data safe but a relatively lower proportion (66%) will purchase more from the same brand if it keeps their personal information safe.

Additionally, the presence of well-known digital wallets as payment options is a leading signal that increases consumer trust in websites. Quality of the website and customer reviews/business ratings are the next two.

This perception of digital payment services as a trust signal is validated by its potential usage by consumers across all channels. Sixty-three percent indicate they are likely to use digital payment services for online purchases in the next three years while 47% are likely to do so at a physical store. When it comes to voice services, ~40% are more comfortable using digital payment services over credit cards.

Even as businesses prepare themselves to offer a connected commerce experience to their consumers, it is essential that they take adequate steps to maintain and build trust across all channels. By offering simple, seamless checkout through trusted third-party payment solutions such as Amazon Pay with Alexa, merchants can appeal to the connected consumer, circumventing the trust gap that comes with less familiar websites. Refer to pages 15-16 for the data.



Trust and the security of personal information is the most important attribute when consumers shop in any channel.

Importance of trust/security while shopping in a channel

Percent who rated somewhat or very important



85%

Survey question: Please indicate how important these attributes are when you shop in a channel

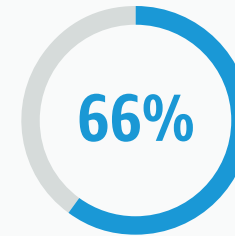
Attitude towards data security and brand loyalty

Percent who rated somewhat agree or strongly agree to this statement



will switch from a brand if they do not trust it to keep their data safe

Survey question: How strongly do you agree with the following statements?



will purchase more from the same brand if it keeps their personal information safe

Important attributes to increase confidence in a company that sells products/services

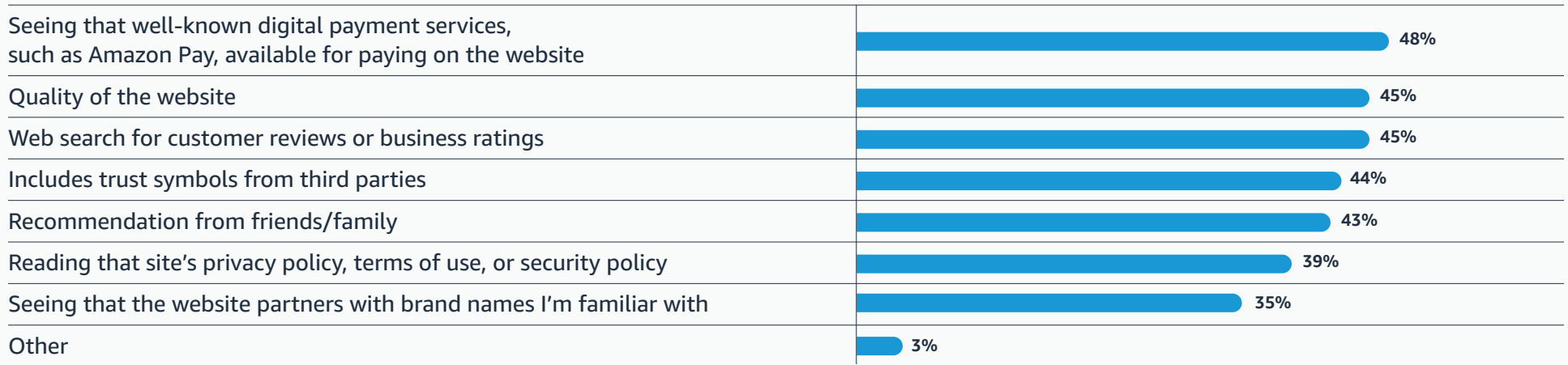
Percent ratings these options as one of their top five attributes

Guarantee not to share my information without permission	55%
Seek consent to use my information	49%
Have a strong privacy policy	49%
Is transparent about how my information is used	40%
Proactively communicate if there has been a security breach	36%
Offer an immediately reachable 24x7 security only helpline that I can reach to report any security concerns	32%
Communicate and reinforce how they are keeping my personal information safe	30%
Privately offer tips on how I can keep my personal information secure	17%
If I see that the seller is collaborating with other brands I trust	16%
Other	2%

Survey question: Provided are a few ways in which companies can foster trust among customers about the use of their personal information. Please pick up to 5 based on what you think will increase your confidence in a company that sells products/services.

Signals to increase trust in unfamiliar websites

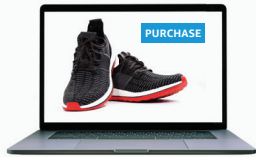
Percent who rated these options as one of their top five attributes



Survey question: When you think about shopping at an unfamiliar website, please pick the three signals that will increase your trust in that website.

Use of digital payment services

Percent rating somewhat or very likely on options



63%

Pay using a digital payment service (such as Amazon Pay etc.) while shopping online



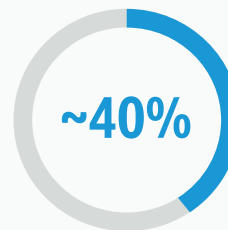
47%

Pay using a digital payment service on my mobile at a store

Survey question: In three years, how likely are you to experience the following?

Use of digital payment services over credit cards for voice transactions

Percent who rated somewhat agree or strongly agree to this statement



are comfortable using digital payment services over credit cards for voice services

Survey question: How strongly do you agree with the following statements?

Last word

While great products and services go a long way towards acquiring and retaining consumers, they do not go all the way. Equally important is the access to those great products and services. With the advent of voice in the current decade, we have opened a new chapter in enabling consumers to access products and services.

With voice being integrated into smart speakers, mobile phones, smart devices, cars, wearables, and more, we have truly arrived in an era where device dependency is irrelevant. Consumer expectations have skyrocketed to a point where shoppers have been primed to expect changes to the way they shop every few years. Voice is one such change.

Consumers love the convenience, speed, and context that voice offers. An entire shopping journey can be completed within the voice channel or span multiple channels. If a consumer is doing laundry and runs out of detergent, he/she can reorder at that very moment, just by using their voice.

Similarly, a consumer can notice his/her friend wearing cool, new sneakers and use voice to add it to his/her cart in two different colors. They check out the sneakers on a website, head over to the store to try them on, and then buy the one they prefer using a mobile app on their smartphone. Once they have done that, they can even ask their voice service – “Where’s my stuff?”.

Businesses, no matter the industry, must prepare for this next level of consumer expectation. Just as they had to develop a web strategy in the 90’s and a mobile strategy in ‘00s, businesses are going to need a voice strategy considering the potential adoption highlighted in this report. However, in the pursuit of convenience, they should not forget that loyalty rests on the pillar of consumer trust.

If businesses take a wait-and-watch approach to voice, they will disappoint consumers. If they move too fast, they might compromise on security. They need to strike a fine balance in executing a voice strategy that is also a core part of their overall commerce roadmap. However, to do that, they first need to recognize that voice is a strong long-term opportunity. Not because we say so but because consumers have expressed just that.

Once businesses have acknowledged the opportunity that voice presents, they can take their first step by visiting <https://pay.amazon.com/alexa> to see how Amazon Pay can help get them started with voice and offer consumers a truly connected experience.

Appendix










Adoption of voice in the shopping journey in the next three years

Percent who indicated that they are somewhat or very likely to use voice services in some phase of their shopping journey in the next three years

Global respondents	US	UK	France	Germany	Spain	Italy	India	Japan
44%	39%	34%	41%	26%	58%	52%	85%	32%

Adoption of voice in every step of the shopping journey in the next three years









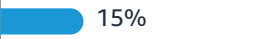
Adoption of voice in every step of the shopping journey in the next three years

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Searching for products	 43%	39%	33%	38%	28%	55%	51%	79%	35%
Checking delivery status	 43%	42%	33%	37%	28%	53%	51%	78%	32%
Comparing prices	 42%	39%	31%	40%	28%	53%	51%	77%	31%
Making a shopping list	 40%	42%	32%	38%	28%	52%	49%	76%	17%
Contacting customer support	 39%	34%	26%	38%	20%	52%	50%	79%	25%
Adding items to a shopping cart from a shopping list	 36%	34%	28%	32%	22%	47%	45%	75%	19%
Arranging to return a product	 34%	28%	24%	34%	19%	44%	45%	73%	18%
Providing feedback on products	 33%	29%	24%	33%	20%	42%	43%	72%	15%
Purchasing and paying for a product	 30%	26%	21%	25%	16%	41%	36%	68%	18%

Survey question: In three years, how likely are you to use voice services for the following activities?

Reasons for using voice commerce currently/in future









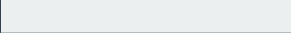




Percent who ranked these options as one of their top five reasons

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Easy to use	 49%	54%	45%	49%	42%	47%	36%	67%	49%
Faster way to shop	 44%	43%	35%	39%	34%	47%	46%	61%	47%
The novelty of it	 33%	29%	37%	36%	28%	47%	45%	27%	25%
Enables me to multi-task and do other things	 31%	39%	28%	23%	20%	38%	35%	48%	22%
Able to purchase in the moment/in context	 28%	30%	24%	21%	18%	31%	25%	37%	35%
Automates routine purchases	 25%	23%	20%	16%	22%	28%	25%	33%	30%
Feels like speaking to a real person	 20%	17%	14%	13%	11%	24%	22%	40%	19%
Offers personalized recommendations	 15%	16%	10%	12%	9%	18%	14%	32%	11%
Makes me look cool in front of friends and family	 9%	8%	8%	7%	6%	7%	7%	27%	3%

Survey question: Please pick up to five reasons why you use/you will use voice services for purchasing products/services

Likelihood to purchase from these categories using voice services in three years









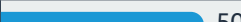



Percent who rated somewhat or very likely (among those who said they'll use voice services in some part of their shopping journey in three years)

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Music	 60%	58%	56%	50%	54%	55%	57%	76%	51%
Movies or TV shows	 57%	54%	53%	47%	52%	52%	55%	73%	46%
Groceries	 56%	53%	52%	42%	42%	56%	44%	79%	49%
Books or textbooks	 54%	43%	52%	42%	45%	57%	60%	72%	39%
Clothing, shoes, or accessories	 54%	48%	47%	47%	49%	54%	54%	71%	40%
Home, kitchen, or garden items	 52%	45%	45%	50%	47%	52%	54%	67%	39%
Consumer electronics or personal computers	 52%	43%	46%	43%	44%	57%	57%	68%	38%
Beauty, health, or personal care items	 51%	45%	43%	46%	40%	52%	52%	70%	34%
Toys, games, or video games	 45%	42%	42%	40%	38%	47%	47%	59%	29%
Sports and outdoor equipment	 43%	33%	36%	37%	32%	50%	44%	59%	30%
Pet supplies	 40%	41%	40%	35%	32%	44%	46%	46%	24%
Automotive	 37%	33%	32%	35%	24%	47%	37%	53%	15%
Baby clothing, baby food, and baby supplies	 37%	24%	28%	32%	22%	46%	45%	58%	14%

Survey question: In three years, how likely are you to use voice services to purchase these items?

Likelihood to purchase from these categories using voice services in three years





Percent who rated somewhat or very likely (among those who said they'll use voice services in some part of their shopping journey in three years)

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Online food ordering/delivery services	 61%	57%	55%	50%	42%	67%	59%	84%	45%
Digital or streaming music	 61%	60%	57%	50%	53%	59%	58%	78%	47%
Digital or streaming movies or TV shows	 59%	55%	55%	48%	51%	57%	60%	74%	48%
Hotel/stay booking	 57%	46%	49%	55%	41%	63%	63%	75%	48%
Travel ticket booking	 56%	41%	48%	53%	41%	61%	60%	76%	47%
Event tickets	 55%	45%	47%	52%	45%	63%	56%	71%	43%
Digital books or textbooks	 52%	43%	49%	39%	41%	54%	57%	71%	36%
Bill payment	 50%	47%	46%	41%	34%	50%	49%	74%	27%
Rid sharing/cab services	 50%	46%	39%	43%	35%	53%	44%	76%	32%
Digital or streaming video games	 47%	42%	45%	38%	38%	46%	44%	66%	36%
Car-rental	 45%	37%	35%	40%	29%	46%	41%	72%	30%
Subscriptions	 44%	33%	40%	39%	30%	46%	45%	65%	27%

Survey question: In three years, how likely are you to use voice services to purchase the following?

Adoption of voice for commerce and other financial activities




Percent who indicated that they are somewhat or very likely to use voice services for these activities in the next three years

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Pay bills (utility, credit card) etc.	 26%	24%	19%	22%	10%	32%	28%	67%	13%
Banking	 26%	22%	18%	22%	13%	37%	29%	60%	12%
Send and receive money from individuals	 22%	18%	16%	17%	11%	30%	26%	61%	8%
Donate to charity	 19%	15%	14%	14%	8%	24%	22%	54%	7%

Survey question: In three years, how likely are you to use voice services for the following activities?

Consumers expecting a growth in the proportion of purchases from each channel


Percent who rated increase marginally or significantly when asked how their proportion of purchases from these channels will change in the next three years

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Online	 59%	52%	47%	55%	50%	73%	74%	87%	4%
Voice	 21%	12%	13%	18%	19%	29%	32%	44%	13%
Physical store	 11%	11%	11%	8%	7%	9%	14%	25%	3%

Survey question: In three years, how will the proportion of your purchases through these channels change?

Likelihood to switch channels within a shopping journey in the next three years



Percent rating somewhat likely or very likely

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Frequency of switching shopping channel	 42%	48%	35%	44%	23%	46%	42%	65%	38%

Survey question: In three years, how likely are you to be involved in a shopping journey that spans multiple channels where you start shopping in one channel but complete the purchase in another?

Attitudes towards cross-channel shopping


Percent who rated somewhat agree or strongly agree to this statement

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
I will recommend a seller if they offer a seamless and continuous customer experience across all channels	 49%	53%	46%	37%	32%	64%	55%	78%	33%
I am comfortable starting the purchase process in one channel and completing it in an entirely different channel	 39%	41%	37%	44%	27%	46%	36%	63%	27%

Survey question: How strongly do you agree with the following statements?

Satisfaction with companies' ability today to offer a seamless and continuous shopping experience



Percent rating somewhat satisfied or very satisfied

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Satisfaction	 52%	58%	46%	45%	35%	60%	54%	78%	42%

Survey question: How satisfied are you today with companies offering a seamless and continuous shopping experience across channels?

Likelihood to switch from voice to another channel within a shopping journey in three years




Percent rating somewhat likely or very likely

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Start shopping on voice and end online	 19%	19%	15%	16%	16%	21%	18%	36%	16%
Start shopping on voice and end at a physical store	 19%	22%	16%	20%	12%	18%	20%	35%	12%

Survey question: In three years, which of the following do you expect to experience?

Attitudes towards customer experience






Percent who rated somewhat agree or strongly agree to these statements

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
I will switch from a seller if they don't offer a good customer experience	 71%	76%	74%	73%	66%	81%	74%	84%	46%
I always share a bad experience with a product or service with my friends and family	 59%	59%	63%	56%	61%	63%	61%	68%	42%
I am willing to share my personal information if it is used by the seller to offer a continuous experience across all channels (i.e. online, physical stores, voice)	 25%	23%	22%	18%	13%	31%	28%	58%	12%

Survey question: How strongly do you agree with the following statements?

Importance of attributes while shopping in a channel

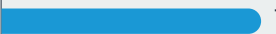

Percent rating somewhat or very important

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Trust/Security of my personal information while shopping in the channel	 85%	87%	89%	83%	75%	88%	87%	89%	80%
Convenience/Easy to use the channel	 84%	86%	88%	82%	75%	88%	87%	89%	81%
Level of customer service while shopping in the channel	 75%	73%	74%	81%	65%	81%	80%	87%	66%
Customer experience in the channel	 74%	79%	78%	74%	61%	83%	79%	87%	55%
Level of personalization in the channel	 54%	54%	47%	55%	38%	63%	59%	80%	49%

Survey question: Please indicate how important these attributes are when you shop in a channel

Attitude towards data security and brand loyalty









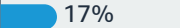

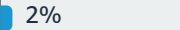
Percent who rated somewhat agree or strongly agree to these statements

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
I will switch from a seller if I don't trust them to keep my data safe	 79%	84%	81%	82%	78%	84%	78%	84%	67%
I will purchase more from a seller if I trust them to keep my personal information safe	 66%	69%	62%	64%	71%	76%	64%	81%	42%

Survey question: How strongly do you agree with the following statements?

Important attributes to increase confidence in a company that sells products/services

Percent ratings these options as one of their top five attributes









	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Guarantee not to share my information without permission	 55%	59%	55%	50%	49%	55%	49%	56%	62%
Seek consent to use my information	 49%	46%	49%	58%	50%	54%	53%	43%	48%
Have a strong privacy policy	 49%	53%	48%	42%	49%	43%	35%	59%	49%
Is transparent about how my information is used	 40%	40%	40%	39%	32%	37%	40%	50%	44%
Let's me choose what information about me can be captured and/or shared	 36%	46%	39%	34%	39%	37%	32%	39%	19%
Proactive communicate if there has been a security breach	 36%	43%	36%	19%	28%	37%	31%	37%	48%
Offer an immediately reachable 24x7 security only helpline that I can reach to report any security concerns	 32%	33%	31%	29%	17%	36%	27%	48%	34%
Communicate and reinforce how they are keeping my personal information safe	 30%	30%	25%	29%	18%	31%	32%	36%	40%
Proactively offer tips on how I can keep my personal information secure	 17%	19%	15%	16%	12%	23%	18%	30%	11%
If I see that the seller is collaborating with other brands that I trust	 16%	14%	14%	13%	16%	22%	18%	27%	10%
Other	 2%	2%	4%	2%	4%	1%	1%	0%*	1%

Survey question: Please pick five based on what you think will increase your confidence in a company that sells products/services

*Not enough survey responses to be significant with less than 1% of total responses.

Signals to increase trust in unfamiliar websites


Percent ratings these options as one of their top five attributes

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Seeing that well-known digital payment services, such as Amazon Pay, available for paying on the website	 48%	42%	51%	55%	56%	59%	56%	50%	27%
Quality of the website	 45%	42%	39%	62%	37%	43%	47%	48%	50%
Web search for customer reviews or business ratings	 45%	43%	35%	48%	48%	43%	48%	44%	53%
Includes trust symbols from third parties	 44%	52%	58%	22%	28%	39%	38%	45%	53%
Recommendation from friends/family	 43%	45%	46%	45%	51%	43%	37%	40%	30%
Reading the site's privacy policy, terms of use, or security policy	 39%	38%	38%	42%	43%	31%	38%	37%	42%
Seeing that the website partners with brand names I'm familiar with	 35%	34%	30%	24%	32%	40%	36%	36%	43%
Other	 3%	3%	4%	4%	5%	1%	1%	1%	1%

Survey question: When you think about shopping at an unfamiliar website, please pick the three signals that will increase your trust in that website

Use of digital payment services over credit cards for voice transactions



Percent rating somewhat agree or strongly agree

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
I am more comfortable using digital payment services (such as Amazon Pay) than credit cards for voice transactions	 40%	31%	31%	34%	32%	70%	47%	71%	20%

Survey question: How strongly do you agree with the following statements?

Use of digital payment services in the next three years

Percent rating somewhat or very likely

	Global respondents n=10297	US n=1898	UK n=1399	France n=951	Germany n=1437	Spain n=951	Italy n=953	India n=1240	Japan n=1468
Pay using a digital payment service (such as Amazon Pay) while shopping online	 63%	56%	61%	63%	58%	77%	74%	88%	44%
Pay using a digital payment service on my mobile (such as Amazon Pay) at a store	 47%	42%	38%	39%	30%	63%	54%	84%	39%

Survey question: In three years, how likely are you to experience the following?

For more insights on connected commerce, visit: pay.amazon.com.

