



Adobe Experience Index (Southeast Asia): Consumer Experience Expectations Score & Insights

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Executive Summary



Experiences tenets are at or above the 50% mark.

- Slightly lower than the US, but all tenets have the same ranking
- “Know Me and Respect Me” and “Delight Me at Every Turn” are rated higher
- Consumers are more critical when things are broken or don’t meet their expectations. “Speak in One Voice” and “Make Technology Transparent” came in lowest.



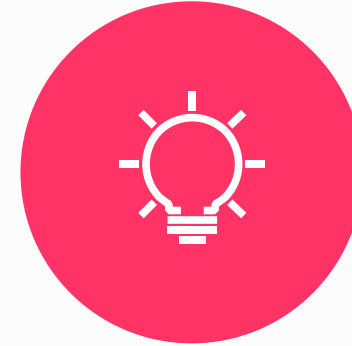
Scores increase with consumers age.

- P50-64 have the highest consumer experience scores which is largely driven by “Know Me and Respect Me”
- “Speak in One Voice” is rated equally across all age segments



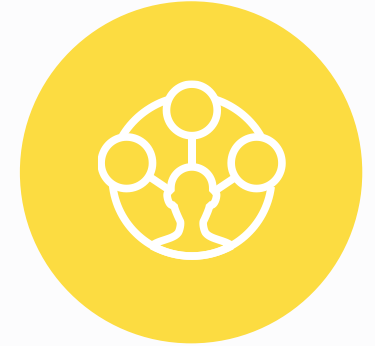
Consumers desire personal service but also crave human interaction.

- 3 in 4 believe that technological innovations will improve their lives. However, 2 in 3 consumers 50+ are concerned that automation will eliminate jobs.
- 3 in 4 consumers across age segments want personalized service, but 2 in 3 can be delighted by automated interactions (slightly lower for P18-24).



The most exciting future innovations enhance real life interactions.

- Top ranked experiences include enhancing hotel, museum and arena visits.
- Most negative experience scores revolve around lack of understanding of policies (e.g. ongoing fees, hidden fees, returns or cancellation)



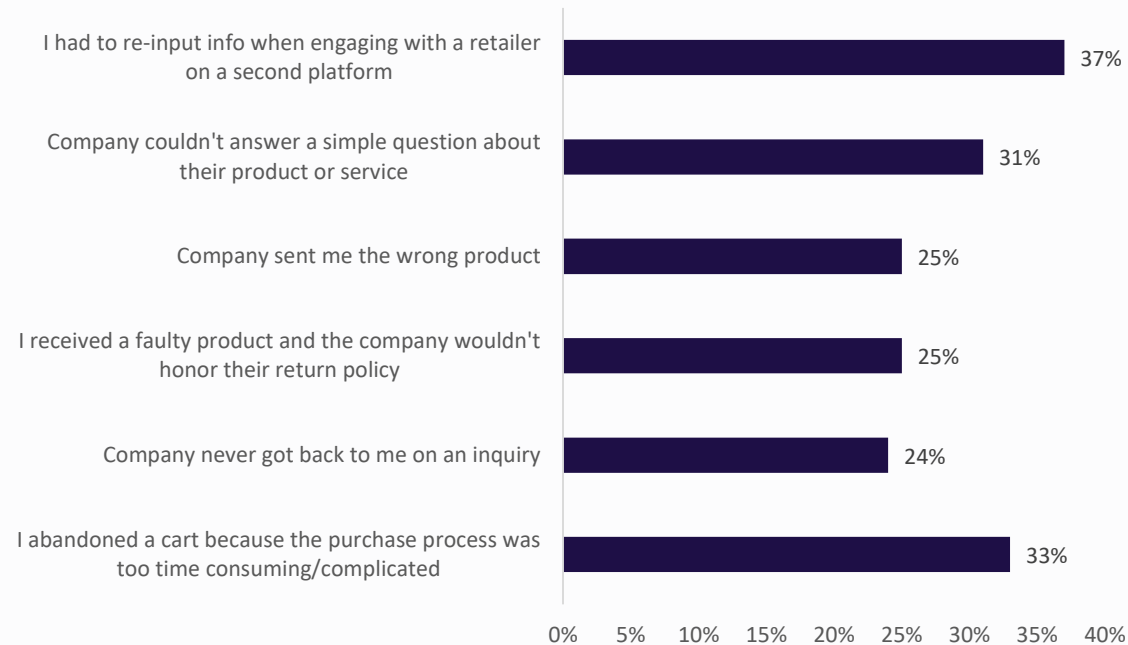
Addressing needs – either support or future – represents the biggest area for improvement.

- Across all four industries, Retail, Travel & Hospitality, Media & Entertainment, and Financial consumers gave companies low marks in terms of delivering good customer support and ability to anticipate information needs.

Why Does This Matter?

Frustrated Consumers: Over 1 in 4 have had bad customer experience or customer care; Net result 1 in 3 abandoned cart

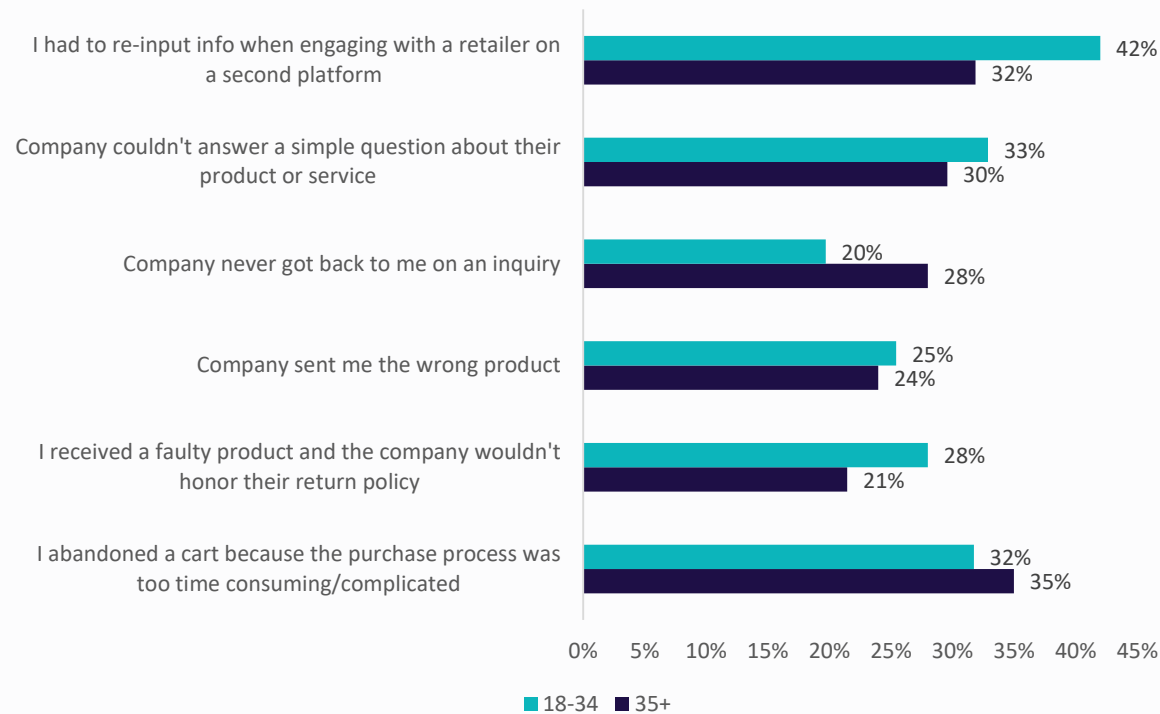
Consumer Retail Experiences - Southeast Asia



Data Source: Southeast Asia Consumer Experience Expectations Survey 2019. April 2019 n = 1,003

Frustrated Consumers: 4 in 10 Millennials had to re-input information across platform; 1 in 4 P35+ never heard back from company; Net result 1 in 3 abandoned cart

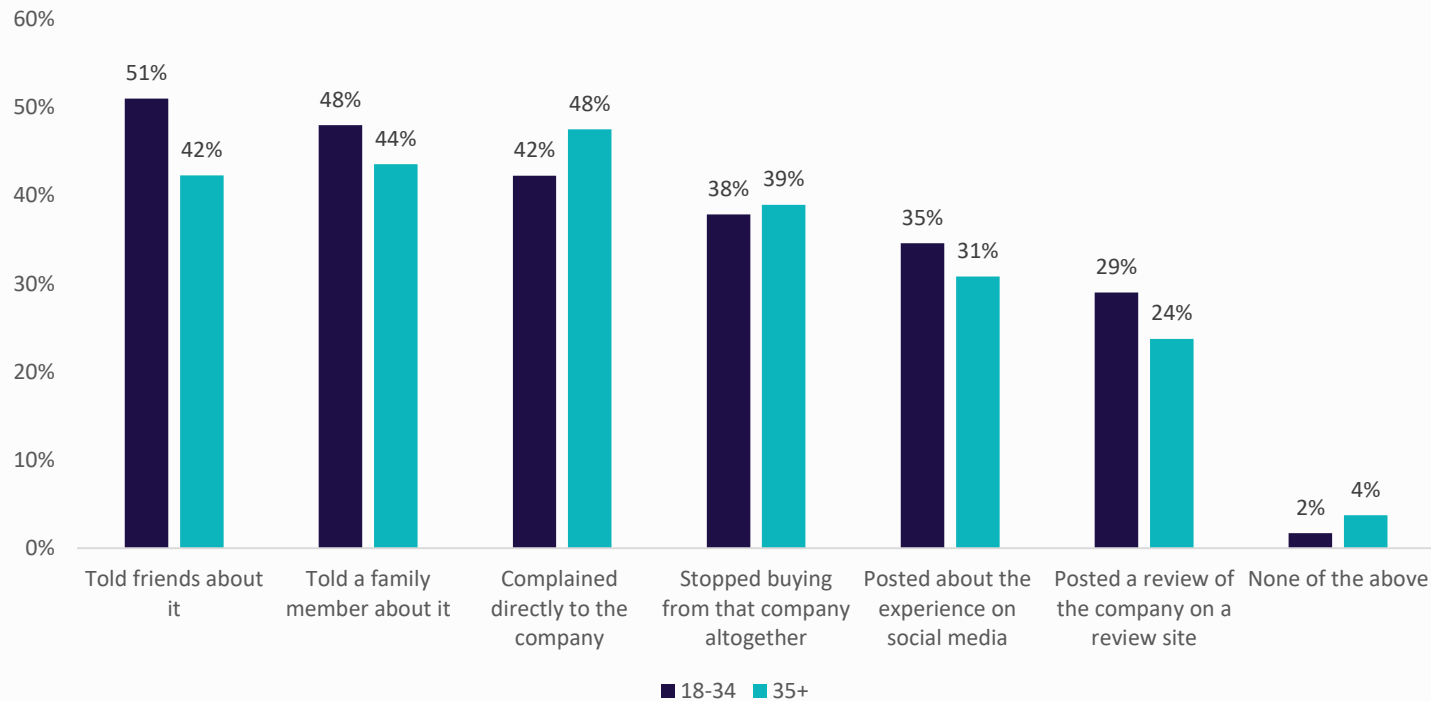
Consumer Retail Experiences by Age - Southeast Asia



Data Source: Southeast Asia Consumer Experience Expectations Survey 2019. April 2019 n = 1,003

Complaint Department: P35+ more likely to complain directly to the company, Millennials more likely to tell others; 4 in 10 will stop purchasing from the company






Actions taken after last bad online customer experience - Southeast Asia



Data Source: Southeast Asia Consumer Experience Expectations Survey 2019. April 2019 n = 1,003

Overall Consumer Experience Index Scores

Consumers indicate experiences have significant room to improve

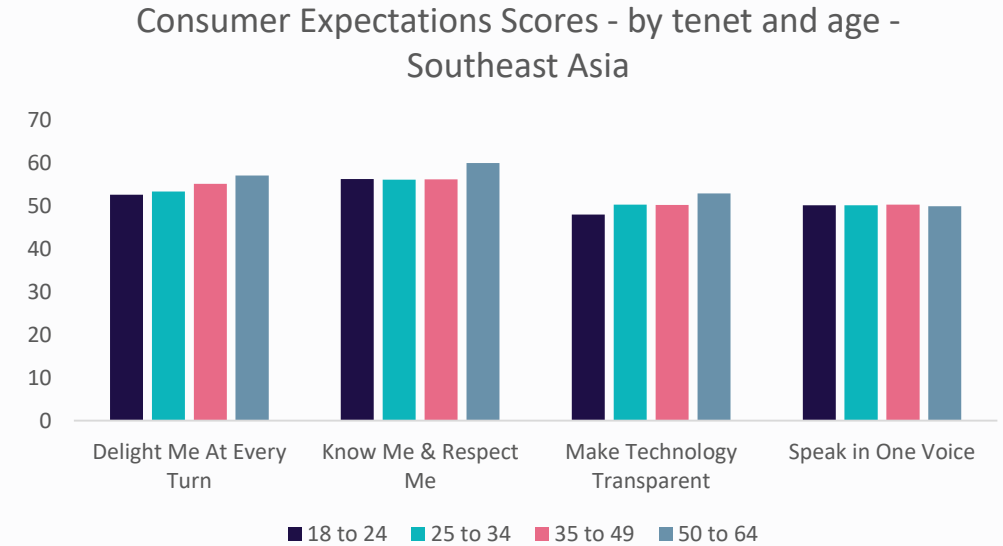
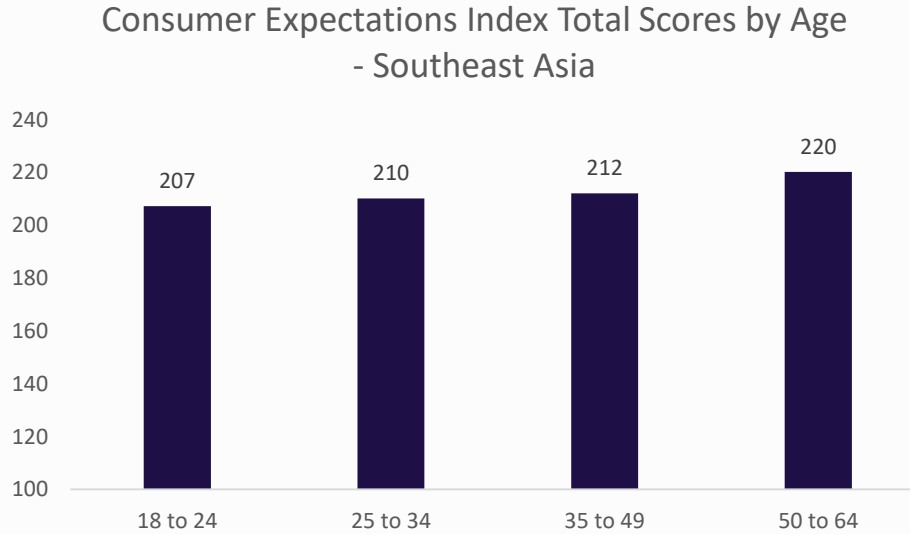
Tenet	Consumer Experience Expectations Score
Know Me & Respect Me	57 / 100 
Delight Me at Every Turn	54 / 100 
Make Technology Transparent	50 / 100 
Speak in One Voice	50 / 100 
Southeast Asia Overall Score:	212 / 400 

- Consumers rank experiences at an average of 50% of potential score
- ‘Know Me & Respect Me’ and ‘Delight Me at Every Turn’ are ranked higher

Data Source: Southeast Asia Consumer Experience Expectations Survey 2019. April 2019 n = 1,003

Generational Differences

Consumers over 50 give higher experience index scores.



Out of 100 total possible points

Know Me and Respect Me and Delight Me at Every Turn drive higher scores among those 50+

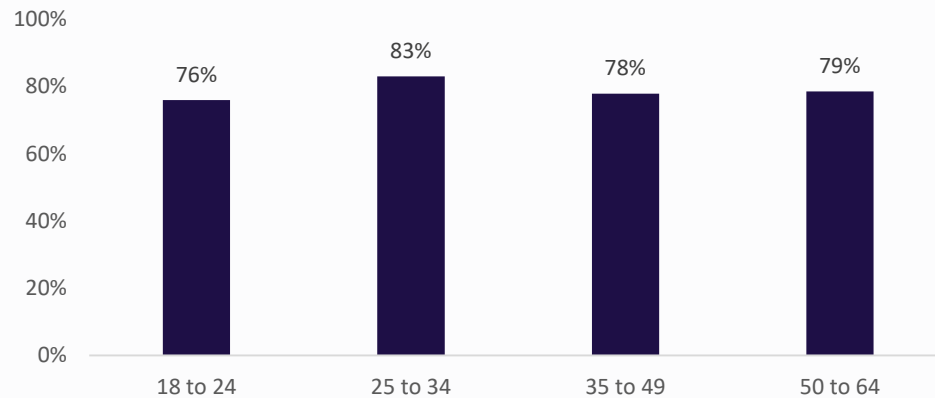
Data Source: Southeast Asia Consumer Experience Expectations Survey 2019. April 2019 n = 1,003



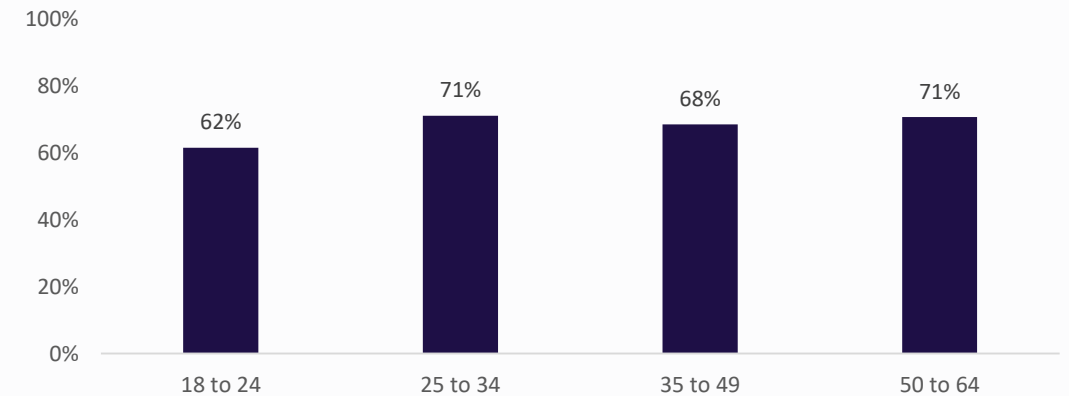
Technology Sentiment

Personal service is required; consumers comfortable with everyday interactions being automated.

% Agreement: 'Whether in store or online, businesses should provide personal service' by age - Southeast Asia



% Agreement: 'If done well, a completely automated interaction with a company can still delight me' by age - Southeast Asia



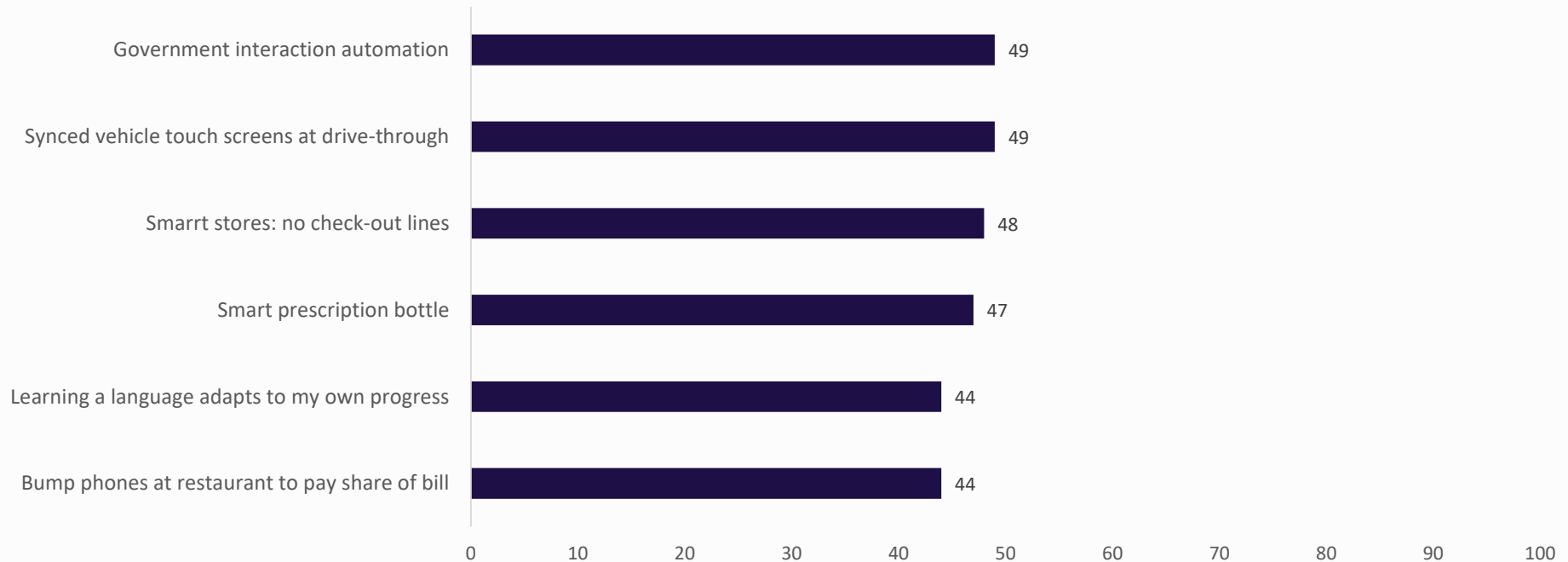
- P18-24 least likely to be delighted by automation

Data Source: Southeast Asia Consumer Experience Expectations Survey 2019. April 2019 n = 1,003

Innovation and Experience Makers & Breakers

Innovations: Future innovation that helps save time is most impressive.

Futuristic Innovation Experiences: Southeast Asia - Total Score



Out of 100 total possible points

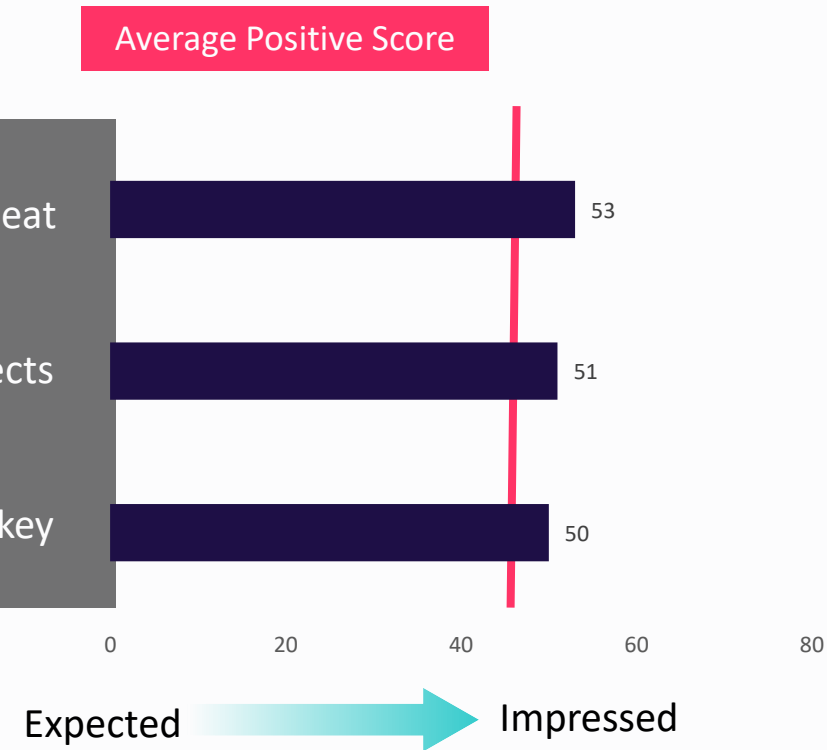


Top Experience Makers (Positive): Consumers are most impressed by experiences that that save them hassle or delight them.

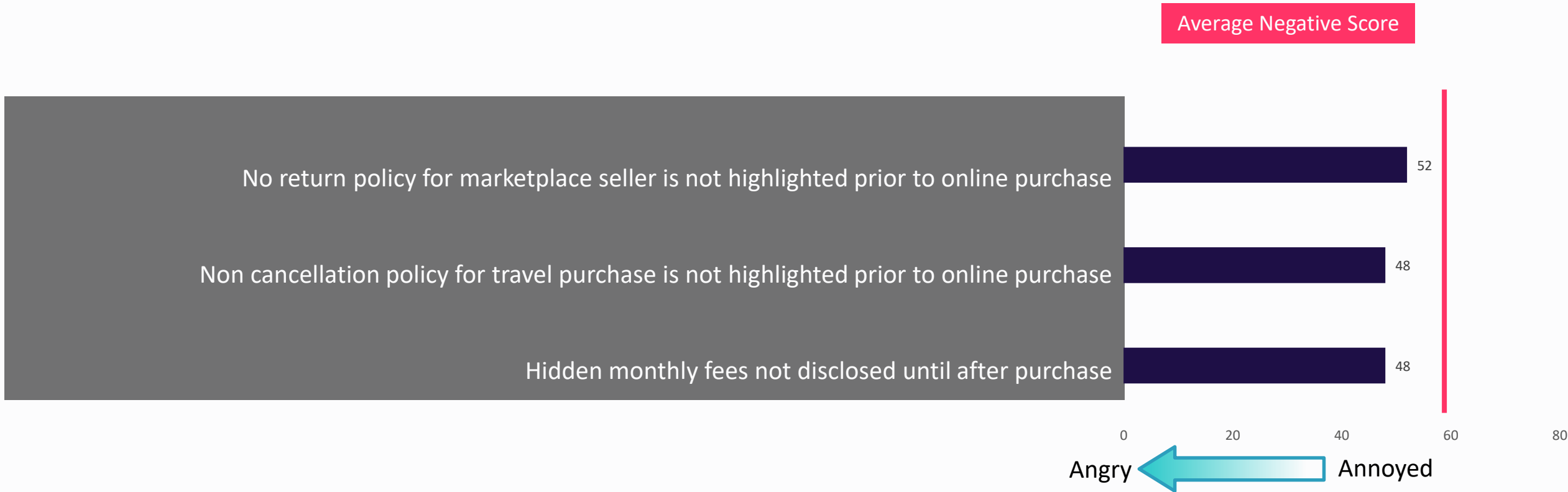
Ability to order food at a stadium from my mobile phone and have it delivered to my seat

App allows for museum tour based on pointing at objects

Hotel app let's me check in and serves as mobile key

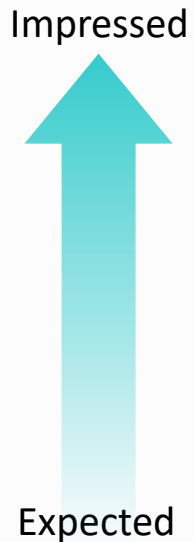


Worst Experience Breakers (Negative): Like US consumers, Southeast Asia consumers find unexpected cost situations to be the biggest experience breakers.

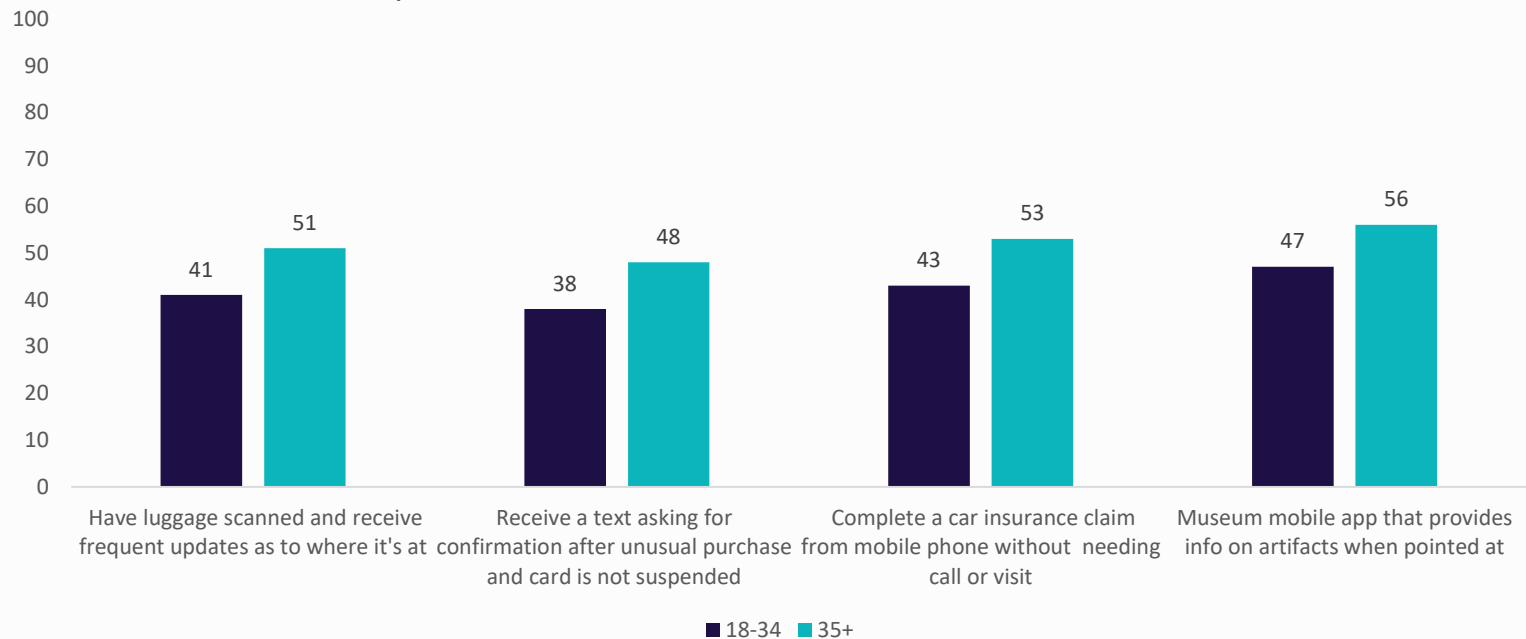


EXPERIENCE INDEX (SOUTHEAST ASIA): CONSUMER EXPERIENCE EXPECTATIONS SCORE BY AGE RANGE

P35+ are more excited about tracking information, not having to deal with customer service reps and bringing museum objects to life through an app.



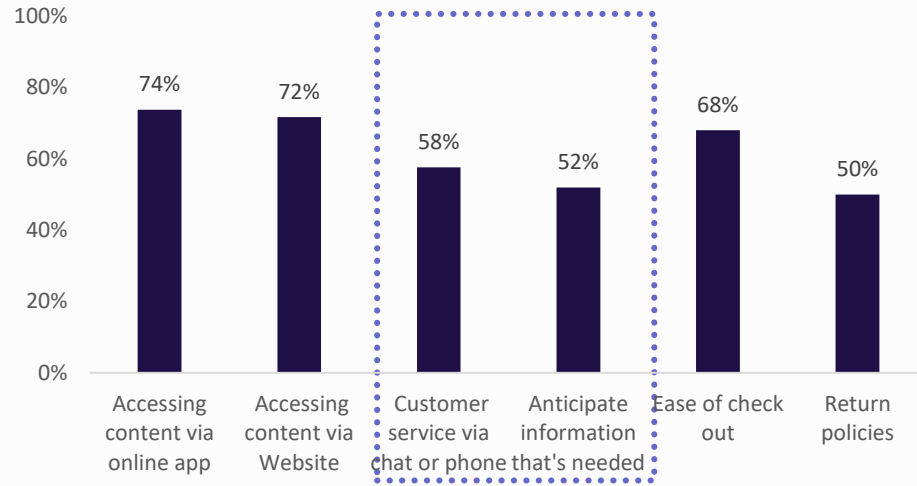
Consumer Expectations Scores: Generational Differences Southeast Asia



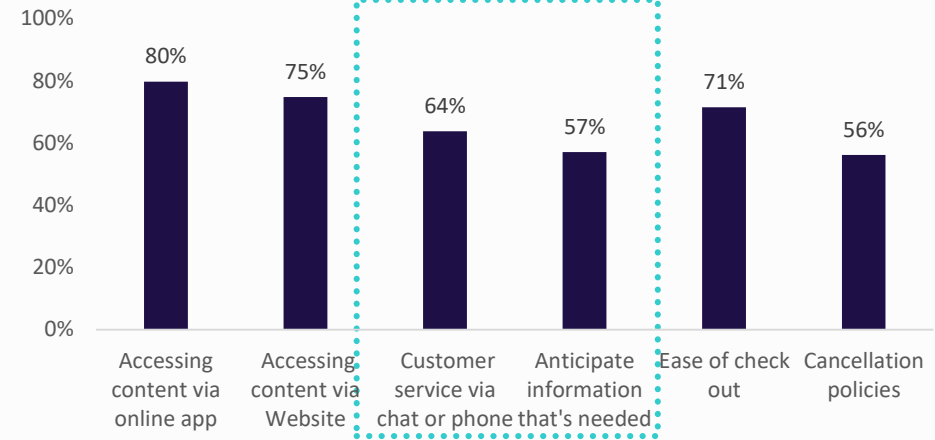
Experiences by Industry

Consumers rate customer service and anticipation of information lower across all industries.

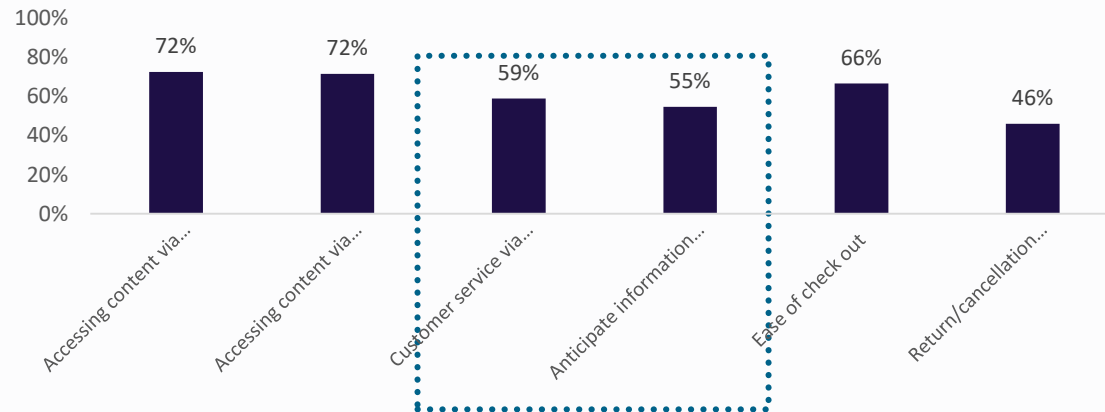
Consumer Ratings for Good Retail Experiences



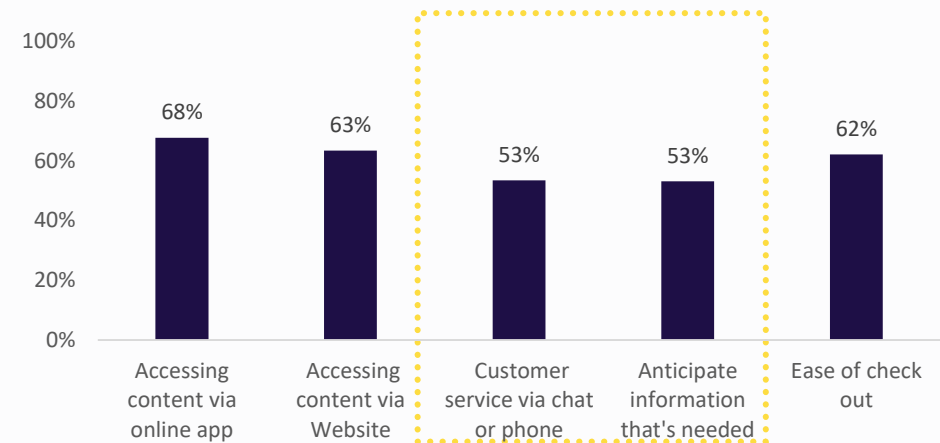
Consumer Ratings for Good Travel & Hospitality Experiences: Southeast Asia



Consumer Ratings for Good Media & Entertainment Experiences: Southeast Asia

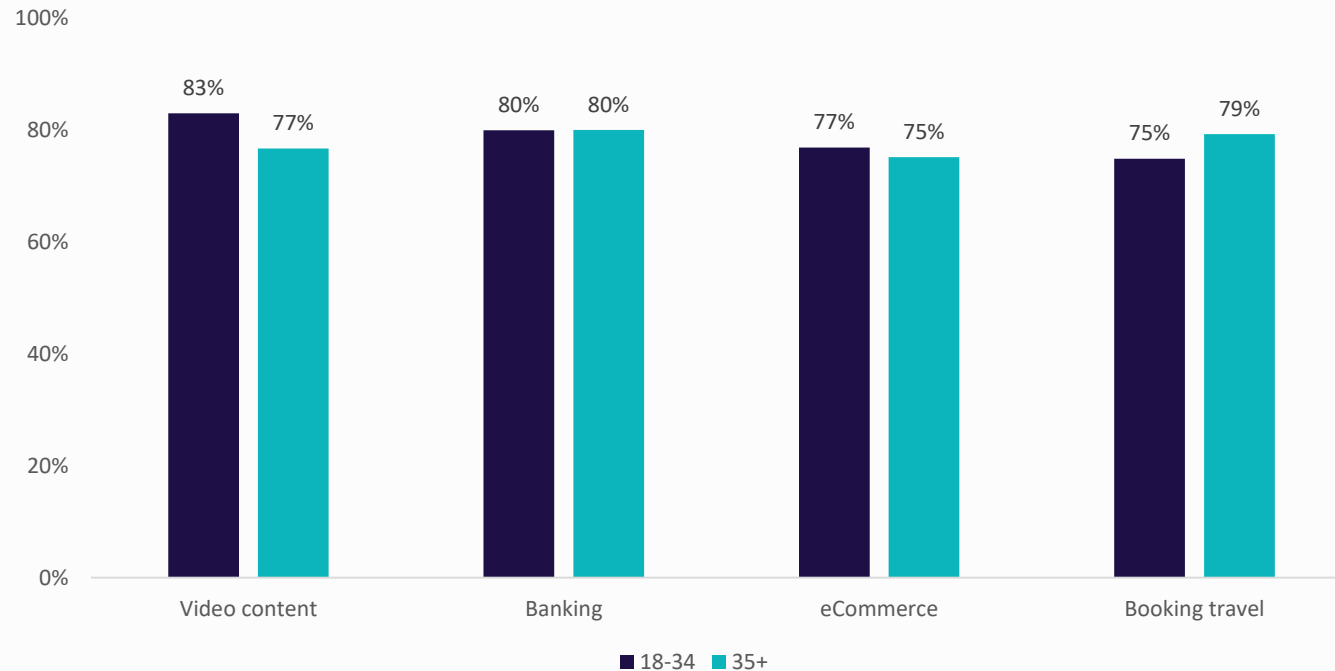


Consumer Ratings for Good Financial Services Experiences: Southeast Asia



What's Better?: The majority have seen an improvement in customer experience across categories; P35+ have seen a larger improvement in terms of booking travel, P18-34 for accessing video content

For which of these types of purchases have you seen the most improvement in the past two years in terms of providing the ideal customer experience - Southeast Asia



Appendix

Consumer Experience Expectations Survey 2019 Methodology (Southeast Asia)

Survey Date Range and Countries:

Conducted in April 2019

- Singapore
- Indonesia
- Malaysia
- Thailand
- Philippines
- Vietnam



Survey Sample:

1,003 Southeast Asian adults
18 or older who owned a qualifying device.



Survey Format:

Online survey regarding preferences and expectations for digital experiences in the Retail, Travel & Hospitality, Media & Entertainment, and Financial Services industries.

Respondents answered questions for up to 2 industries

Consumer Experience Expectations Survey Scoring Methodology

Experiential Questions

Good Experiences

Bad Experiences

- Consumers were given several possible actions they could take when faced with a number of positive and negative experiences they might face.
- Their responses were organized in a scale that captured their reaction from strong positive to strong negative.

Response Point Allocation per Question

Positive Reaction

Strong

Mild

Neutral

Negative Reaction

Neutral

Mild

Strong



Positivity Scale

Points given based on strength of response.

No points are given for having the least positive response “as expected”.

Final Score is a composite of the Positive and Negative Scenario Scores within each Tenet to produce a score out of 100 possible points per tenet, for a total of 400 possible points



Adobe