SPECTRM State of Social Conversational Commerce

2023 REPORT

A Word From our CEO

Today, consumers want to engage with brands in different, more personalized ways. As we uncovered in last year's "<u>State of Social Conversational Commerce</u>" report, customers are excited and eager to message with brands on the apps where they already spend their time. Last year's report helped us understand the current state of customer thoughts and behavior around messaging. Many have already been messaging with brands on Facebook Messenger, Instagram, or WhatsApp. Many have gone on to make a purchase after messaging with a brand. Many are willing to give a brand their data in exchange for more personalization.

What's the state of one-to-one messaging in 2023? Is messaging becoming even more of a preferred channel through which customers can engage with brands? Do they still view brands who offer messaging more favorably than others who don't? Are customers still willing to share their data in a privacy-first way? We found the answers to those questions by polling 1000 individuals from around the world, and found that messaging is gaining even more popularity and interest.

Marketers today are looking for new channels, new ways of connecting directly with customers, and new avenues for gathering data. Let these findings increase your confidence that messaging on Facebook Messenger, Instagram, or WhatsApp is the future of customer engagement and retention.





Here are a few of the key findings from our respondents about messaging with brands:



They're willing to communicate their preferences for personalization. 88% said that they would communicate their preferences in a privacy-safe way directly to a brand in order to receive a more personalized experience.



64% say messaging is the way they prefer to engage with brands. Top reasons they enjoy messaging is because it's fast and convenient.

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PART #1

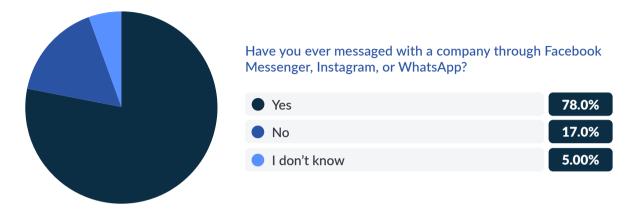
Experiences Messaging with Brands Online



More brands are recognizing the benefits of messaging with their customers on apps like Facebook Messenger, Instagram, or WhatsApp – places where their customers already spend their time messaging with friends and family. But are customers messaging back?

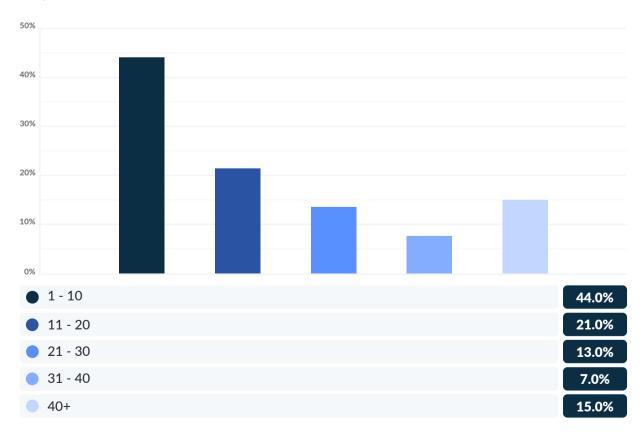
78% have messaged a brand through Facebook Messenger, Instagram, or WhatsApp

Over three-quarters of respondents (78%) say they've messaged with a company through Facebook Messenger, Instagram, or WhatsApp. 17% have not, and 5% weren't sure if they had.



The majority have messaged 11 or more times with a brand

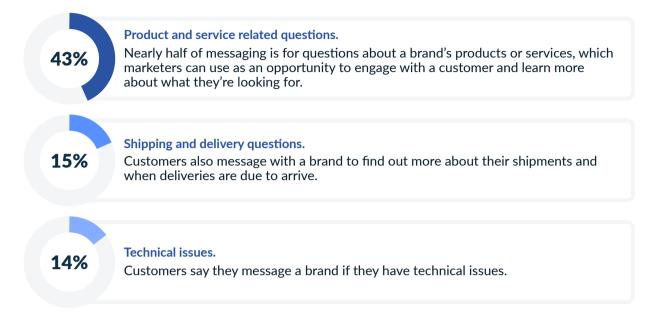
For those who have messaged with a brand, the majority (56%) messaged with a brand eleven times or more over the past year (21% messaged eleven to twenty times, 13% messaged twenty-one to thirty times, 7% messaged thirty-one to forty times, and 15% messaged with a brand over forty times). 44% of respondents messaged with a brand one to ten times over the past year.



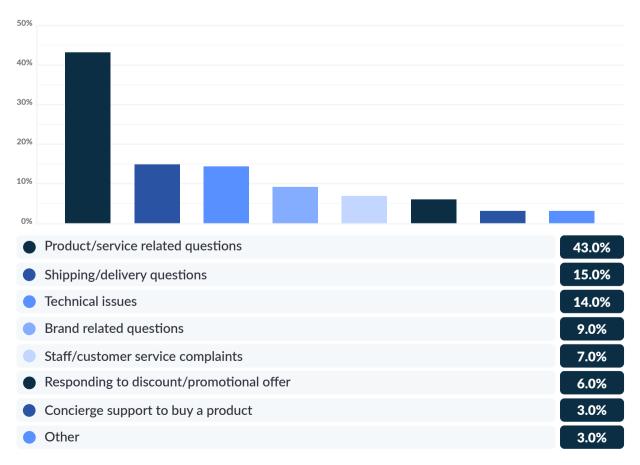
[If yes] How many times have you messaged with a brand via Facebook, Instagram, or WhatsApp in the past 12 months?

They're mostly messaging with product and service related questions

Why do respondents message with brands? Here are the top three answers:



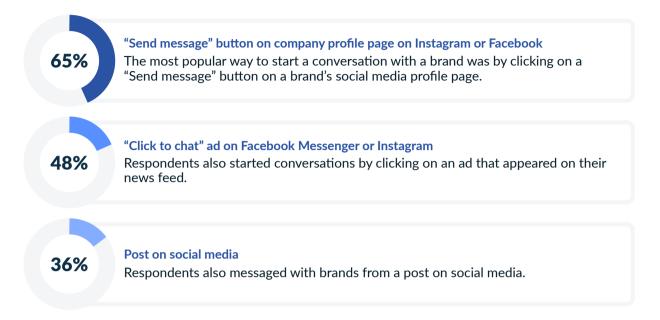
They also message with a company for brand related questions (9%), staff or customer service complaints (7%), responding to discount or promotional offers (6%), as concierge support to buy a product (3%), or with another reason (3%).



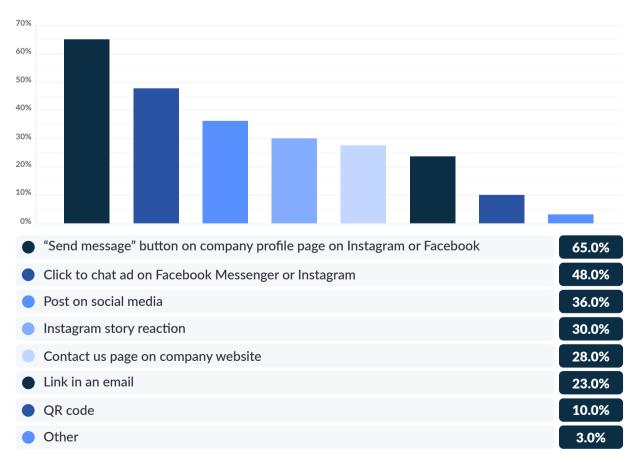
What would you say is the primary purpose of messaging with a company?

The primary way they started the conversation was through a brand's "Send message" button

How did our respondents start their conversation with a brand?



They also started a conversation with a brand through an Instagram story reaction (30%), a "Contact us" page on a company website (28%), a link in an email (23%), a QR code (10%), or through other means (3%).



[If yes] How was the messaging conversation started

82% made a purchase after communicating with a brand via Facebook Messenger, Instagram, or WhatsApp

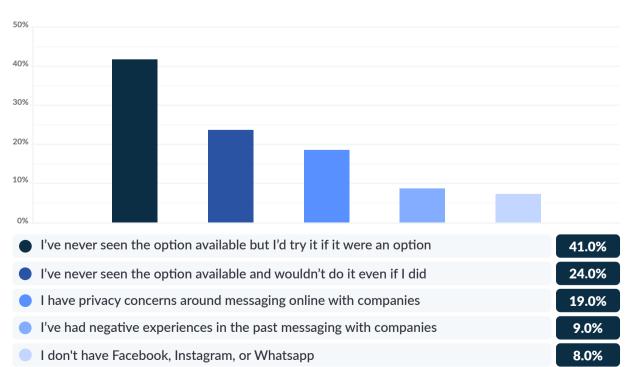
82% of respondents say that after messaging with a brand on Facebook Messenger, Instagram, or WhatsApp, they went on to make a purchase with that brand.



Top reasons why they haven't messaged with a brand

Of those who haven't messaged with a brand through Facebook Messenger, Instagram, or WhatsApp, 41% say they've never seen the option available, but they'd try it if it were an option. 24% say they've never seen the option available, but wouldn't do it even if they did. This means that 65% of respondents who haven't messaged with a brand haven't seen the option to, or they lack awareness of the option to.

19% say they don't message with companies because they have privacy concerns around messaging online with companies. 9% say that because they've had negative experiences in the past messaging with companies, they don't actively message anymore. Finally, 8% say they don't have Facebook, Instagram, or WhatsApp.



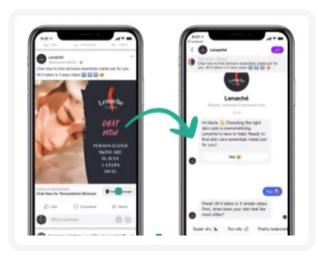
[If no] Why haven't you messaged with a company on Facebook Messenger, Instagram, or WhatsApp before?

86% say their experiences messaging positively impacted their perception of that brand

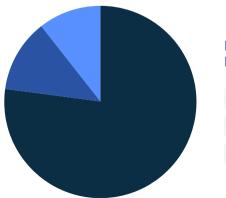
After messaging with a brand, 86% of respondents say they left with a positive perception of the brand. Only 4% say their perception was negatively impacted, and 10% said they weren't impacted either way.



77% of respondents have seen a "Click To Messenger" ad on Facebook or Instagram



Over three-quarters of respondents (77%) have seen a "Click to Messenger" ad on their Facebook or Instagram feeds. 13% have not, and 11% weren't sure if they had.



Have you ever seen a Click To Messenger ad on Facebook or Instagram?

Yes	77.0%
No	13.0%
l'm not sure	11.0%

Of those who saw the ad, 78% clicked on it

Of those who had seen a "Click to Messenger" ad, 78% say they clicked on it and communicated with the brand. 16% did not, and 6% weren't sure if they had.



Of those who clicked on the ad, 75% went on to make a purchase

Of those who clicked on a "Click to Messenger" ad, 75% went on to make a purchase. 20% did not make a purchase, and 5% weren't sure.



38% have had a negative experience with messaging

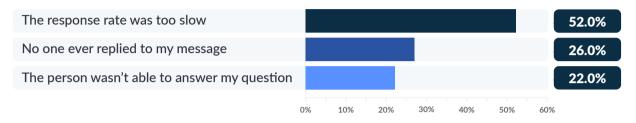
62% of respondents said that over the past year, they have only had positive experiences when communicating with brands through Facebook Messenger, Instagram, or WhatsApp. However, 38% said they have had a negative experience with messaging.



Of those who had a negative experience, 52% said it was because of slow response rate

Of those who did have a negative experience, the majority attribute that experience to the brand's response rate being too slow (52%). 26% said that no one ever replied to their message, and 22% said that whoever they messaged with wasn't able to answer their questions.

[If yes] What's the top reason you'd describe the experience as negative?

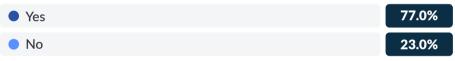


77% said their negative experience caused them to not purchase from the company

Of those who had a negative experience, 77% said that experience led them to not make a purchase from that company. 23% said that the negative experience didn't impact their willingness to buy.



[If yes] Did this negative experience lead to you not buying from the company?



Summary

The numbers here are quite clear: Customers enjoy engaging with brands on the messaging apps where they spend their time each day. Over three-quarters of respondents are already messaging with brands through Facebook Messenger, Instagram, or WhatsApp. What other insights does this section provide for marketers?

A chance to guide the conversation:

Considering that most respondents are messaging with questions about products and services, brands can use messaging as an opportunity to ask questions back and find out more about what their customers are looking for. Automated chatbots can showcase product carousels directly in conversation, and link to relevant product and service pages for a seamless experience

Better ROI and ROAS:

Inviting a customer into a conversation shows an incredible return as well: 78% clicked on an ad that brought them to a conversation, and 75% of that group went on to make a purchase. Marketers looking for new channels in which to see better returns can find it in one-to-one messaging. It's also an excellent opportunity to open a direct retargeting channel where they can send personalized offers and re-engage people in a timely manner.

A more positive perception:

Not only can you increase your return, but you can increase positivity around your brand, too. 86% said that their experiences messaging positively impacted their perception of that brand.

A timely reply increases sales:

Of those who had a negative experience messaging, the main reason was because the response was too slow, or there was no response at all. Brands can improve engagement and increase sales by using AI-powered chatbots to make sure customers get a reply quickly.

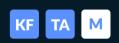
Engagement is going up:

Compared to last year's report, numbers have gone up. More people are messaging with brands than last year. They're messaging more frequently with brands. More people have seen a "Click to Messenger" ad. And more people are clicking through those ads to make a purchase. This should give marketers who are thinking about launching a one-to-one marketing strategy confidence: their audience is waiting for them, ready to engage.

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PART #2

Expectations When Messaging with a Brand



Customers may be interacting with brands through messaging platforms with questions and requests, but does messaging actually lead them to make a purchase? Respondents say it does.

72% have reached out to a brand through a messaging app with questions before purchasing

Nearly three-quarters (72%) say that before they purchased a product or service, they reached out to a brand through Facebook Messenger, Instagram, or WhatsApp with questions.

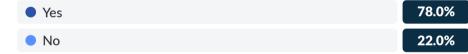


78% are more likely to buy from a brand that offers messaging over one that doesn't

78% of respondents say that they're more likely to buy from a brand who offers them the option to engage through Facebook Messenger, Instagram, or WhatsApp.



If a company provides you the option to engage with them via Facebook Messenger, Instagram, or WhatsApp for assistance as you shop, are you more likely to buy from them instead of a company that does not provide the option?



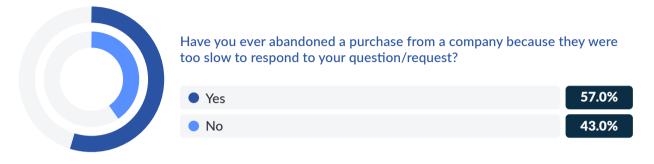
68% will spend more with messaging

68% said they would be more likely to spend more if a brand offered the option of messaging through Facebook Messenger, Instagram, or WhatsApp.



57% have abandoned a purchase because of slow response

Over half (57%) say they've abandoned a purchase from a company because they were too slow in responding to their questions or requests after they messaged.



25% of respondents say response time doesn't matter, as long as they get a response

How long are respondents willing to wait to receive a response to their message? The largest segment (25%) said that time didn't matter as long as they received a reply eventually.

However, the remaining 75% did have a time limit in mind:

9.0%	Want an instant reply	12.0%	Will wait one to two minutes
13.0%	Will wait three to four minutes	15.0%	Will wait five to six minutes
16.0%	Will wait ten minutes	11.0%	Will wait twenty minutes

If you were communicating with a company through Facebook Messenger, Instagram, or WhatsApp, how long are you willing to wait for a response?

Instant							9.0%
1 - 2 minutes							12.0%
3 - 4 minutes							13.0%
5 - 6 minutes							15.0%
10 minutes							16.0%
20 minutes							11.0%
Doesn't matter as long as I get a reply eventually							25.0%
	0%	5%	10%	15%	20%	25%	

Summary

We're seeing more engagement with brands through messaging apps like Facebook Messenger, Instagram, or WhatsApp — and more expectation around that messaging experience. This section gives marketers the following insights.

Guiding the conversation:

Nearly three-quarters of customers say they've messaged a brand with questions before purchasing. This gives marketers the chance to guide their purchase through a conversation in high intent moments, and connect them to the right products and services. Make sure to reply quickly with automated responses, as customers will likely abandon the purchase if they don't hear back.

Drawn towards messaging:

As we saw above, customers are drawn towards brands that offer the ability to message. They're more likely to buy from a brand that offers messaging, and they're more likely to spend more, too. Marketers should look to increase their messaging efforts, since it's a channel that can provide positive brand perception and increase brand affinity.

Messaging makes an impact:

Again, customer engagement with, comfort with, and awareness of messaging with a brand is increasing. Compared to last year's report, more customers are proactively reaching out to brands with questions before purchase. More say they're likely to buy from a brand that offers messaging. More say they're likely to spend more money with a brand that offers messaging. And more have abandoned purchases because a brand was too slow to respond.

PART #3

Feelings Towards Chatbots and Automation

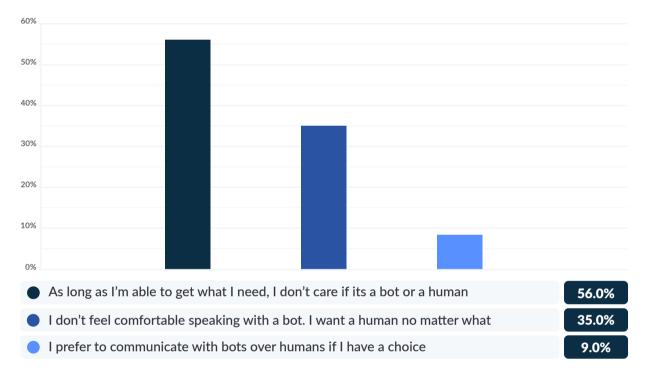


In order to scale their messaging and to always be available for customers, brands are turning to chatbots and conversational AI to drive conversations. And respondents confirm that chatbots will be the future of messaging.

56% say that as long as they're able to get what they need, they don't care if they message with a bot or a human

When messaging with a brand through Facebook Messenger, Instagram, or WhatsApp, over half of respondents (56%) said that they don't care if they're communicating with a bot or a human, just as long as they're able to get what they need.

However, 35% said that they don't feel comfortable speaking with a bot, and want to interact with a human no matter what. 9% said that they actually prefer to communicate with bots over humans if they have a choice.



What best describes how you feel about interacting with a bot/automated system?

Over half would change their mind about speaking with a bot if they could get instant, useful responses

Of the 37% who said they'd rather speak to a human, 63% of them said that they would feel comfortable having a bot or automated system at the other end of the conversation, as long as they were able to receive instant and useful responses.



Summary

Customers are growing more familiar with interacting with bots in conversation. What does this mean for marketers?

Chatting with chatbots:

56% say that as long as they're able to get what they need, they don't care if they message with a bot or a human. And an additional 9% say they always want to message with a chatbot. If 65% of customers feel comfortable interacting with a chatbot, then marketers can confidently invest in their chatbot efforts to scale their messaging efforts across apps and platforms.

Increased familiarity with chatbots:

Compared to last year, we see an increase in comfort with chatbots. More people say that they're fine conversing with a chatbot if they can get what they need. And more who were hesitant about chatbots say that they would change their mind if they could get instant and useful responses. Comfort with AI-powered chatbots will only increase, and marketers should see this as the go-ahead to use chatbots to scale their messaging strategy going forward. PART #4

Privacy, Data, and Personalization



The list of data privacy regulations and technology updates complicating life for marketers grows every day. GDPR, CCPA, iOS14, Apple Mail Privacy, and cookie blocking in browsers are all forcing businesses to think of new ways to collect data from customers. As it turns out, customers will readily provide their information and preferences, but only in certain circumstances.

The majority of respondents are more concerned about data privacy than ever before

Customer behavior and preference around privacy are changing, evident in the fact that 54% of respondents said that they're more concerned about data privacy than ever before. 28% said there's been no change to their concerns around data privacy. Only 18% said they're less concerned about data privacy than ever before.

How do you feel about brands using your personal data to provide a more personalized online shopping experience to you?



Nearly half are fine with brands using their data to provide more personalization, as long as they give permission

Are respondents all right with a brand using their personal data to provide a more personalized experience to them? Nearly half (46%) said that they're okay with that, as long as they give them permission to do so.

The remaining respondents were fairly split on their thoughts around privacy.

15% said they prefer a personalized experience, but wish it was based on their actual preferences rather than from a brand tracking them online without their knowledge. Another 15% said that they have a lack of trust about how their data is going to be used. 14% said that personalized online shopping is not important to them and they don't want their data used. Finally, 9% said they prefer it, and wish more brands would personalize their shopping experience, regardless of how the brand gets their data.



When it comes to your personal data, how have your views evolved over the past 12 months?

35% feel positive about seeing personalized ads from brands they never gave their data to

When respondents see an ad from a brand they've never interacted with that feels personalized – meaning that brand may have gotten their data in some way to personalize that ad for them – only 21% said they feel negatively about that. 44% felt neither positively nor negatively about that. However, 35% said they felt positively about that personalized experience.



88% are comfortable with personalization in exchange for data in a privacy-safe way

88% of respondents said that if they could communicate their preferences directly to a brand in a privacy-safe way to receive a more personalized experience, they would do so.



If you can communicate your preferences directly to a brand in a privacy-safe way, would you feel more comfortable with a personalized experience?



Summary

Data privacy is not only a concern that's on the minds of customers. Privacy regulations and restrictions are making it harder for marketers to collect and act on data as well. But through messaging, marketers now have new options for data collection.

Willingness to share:

Despite their concerns around data privacy online, customers say they're willing to share their personal data and preferences with a brand – with permission – if it's used to create a more personalized experience for them. And 88% say they are comfortable with personalization in exchange for data in a privacy-safe way. That privacy-safe way can be one-to-one messaging, where marketers can collect and own zero-party data about their customers.

More zero- and first-party data:

Compared to last year's report, concern around privacy is increasing. However, now there's more willingness to let a brand use their data to provide more personalization — as long as the customer gives permission. Now's the time for marketers to increase their collection of zero- and first-party data from their customers via messaging.

PART #5

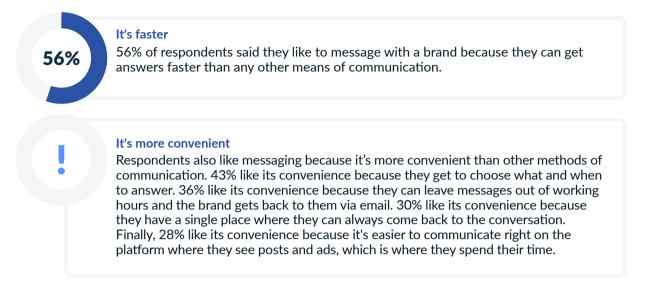
Preferences and Plans for the Future



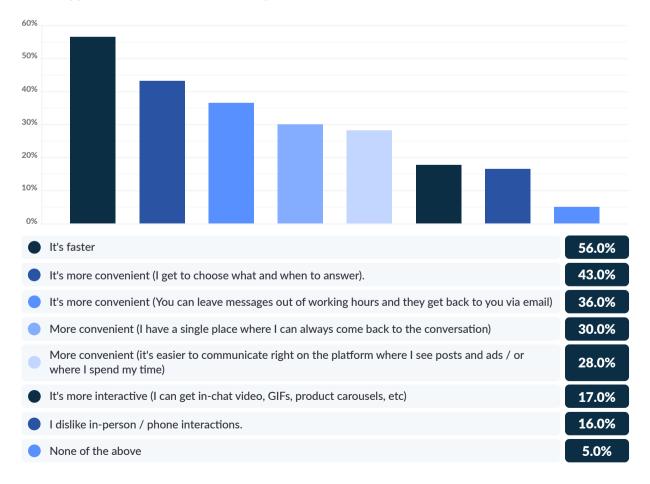
Respondents have already been engaging with brands through messaging apps. But how will they continue to engage, and what more can brands do to provide value through messaging?

Top Reasons Why Consumers Use Messaging

Why do respondents want to engage with a brand through Facebook Messenger, Instagram, or WhatsApp



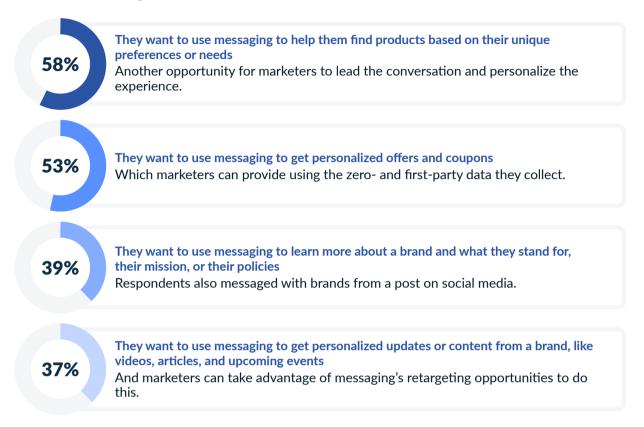
Other reasons for messaging include that it's more interactive with in-chat video, GIFs, product carousels, and more (17%), and because they dislike in-person or phone interactions (16%). Finally, 5% message for reasons other than those listed.



This year, if you were to communicate with a brand via Facebook Messenger, Instagram, or WhatsApp, what would be the most likely reason?

Top Ways Respondents Want Brands to Use Messaging

Other than messaging with customer support questions, respondents also want to message about the following



Finally, they want to use messaging to have a single, convenient place to manage my communications with a brand that I can always come back to (31%).



Outside of customer support, what do you wish messaging with brands could be used for?

They prefer to communicate through WhatsApp

When it comes to a favorite messaging platform, <u>WhatsApp is preferred by the largest segment of</u> <u>respondents</u> (42%), but Facebook Messenger isn't far behind with 38%. 21% say they prefer Instagram DMs instead.

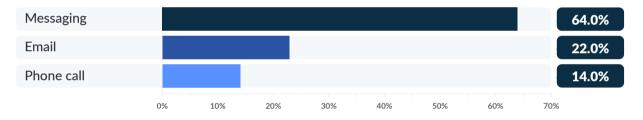
If you had a choice which would be your preferred platform to exchange messages with a company?

WhatsApp							42.0%
Facebook Messenger							38.0%
Instagram DMs							21.0%
	0%	10%	20%	30%	40%	50%	

64% say messaging is the way want to engage with brands online

Overall, messaging is the way the majority of respondents (64%) prefer to engage with a brand online. 22% say they prefer email, and 14% prefer a phone call.

If you could choose any way to engage with a brand online, what would it be?



Summary

Respondents plan to continue messaging with brands going forward — but they have some expectations of what brands can offer them through messaging as well.

Speed and convenience:

Why do customers like to message? It's fast, and it's convenient. Marketers should keep that in mind when evaluating their current marketing strategy: What channel can give you more speed and convenience than messaging?

Expanding messaging use cases:

Outside of customer support, respondents have some ideas for what brands could offer through messaging, mostly centered around personalization. By using the data they're gathered from customers through conversations, marketers can easily provide more personalized experiences and retarget in ways they can't through other channels.

Messaging is gaining preference:

Compared to last year's report, more respondents said that their preferred way to interact with a brand is through messaging. So if marketers aren't offering messaging through Facebook Messenger, Instagram, or WhatsApp, they're going to be left behind sooner rather than later.

PART #6

Actionable Takeaways for Marketing Teams



The challenges marketers face today are many. Worn-out channels that are no longer effective. Constant privacy regulations and updates making it harder to collect data on customers in traditional third-party ways. Creating ad campaigns where you're not sure where your money is going. Not having a direct connection to your audience because of third-party platforms. Old school retention marketing channels, like email, are in decline as a result of shifting consumer attention and measurement issues caused by privacy updates.

But the responses to the above questions tell a new story: Messaging apps are where your customers are, and where they want to be engaging with you. In an economy where marketers are being asked to do more with less, messaging offers one of the most cost-effective ways to grow your customer lifetime value.

Three Reasons to Message

Here are three reasons why consumer marketing teams should leverage conversational commerce on messaging apps like Facebook Messenger, Instagram, or WhatsApp.

Messaging has an impact on brand reception

After messaging with a brand, 86% of respondents said that experience impacted them positively about the brand. 62% said that when messaging with brands over the past year, they've always had positive experiences. And 64% said that if they could choose a way to interact with a brand, it would be through messaging.

This should be incredibly encouraging for marketers, as messaging is a way to boost your brand's perception. But why do the majority of customers feel positive after chatting with a brand? We can guess from other answers above that they enjoy the personalization messaging offers, or they enjoy engaging with a brand one-on-one. They may also enjoy the experience interacting with a chatbot. They likely also feel positive about it because it's different from what everyone else is doing.

Customers make purchases after messaging

Messaging with a brand leads to purchases, too. 82% of respondents said that they made a purchase after communicating with a brand. And 75% said that after clicking a "Click to Messenger" ad, they went on to make a purchase.

Marketers looking for more impactful channels, a higher return on ad spend, and higher customer lifetime value, can turn to messaging channels like Facebook Messenger, Instagram, or WhatsApp. The reason why more customers are going on to purchase after messaging with a brand is because messaging gives the brand the ability to guide the conversation. Unlike one-way ads, messaging allows for a two-way conversation where a chatbot can learn more about the customer's preferences, and reply with product recommendations they may like. It also enables brands to send notifications from messaging apps to their customers. These notifications drive repeat sales and see much higher open rates and click through rates than other retention marketing channels.

They're more likely to buy, and spend more, too

Another reason to leverage messaging is because it can increase willingness to purchase. 76% said they're more likely to buy from a brand that offers the option to message while they shop. And 68% said they're more likely to make bigger purchases if a brand offers messaging.

Not only does messaging offer a way for marketers to get to better know their audience, see a better return on their ad spend, and guide the conversation to connect customers to products. Messaging also leads to more purchases. Customers want to spend money with brands who engage them on a one-to-one level, who want to get to know them, and who offer something different than all the other companies out there.

Messaging is the best channel to build a customer relationship through two-way communication in a persistent communication thread. Brands can send notifications to bring customers back, and customers have the context of their entire conversation in the messaging thread.

Five Tactical Takeaways

If you're ready to get started with messaging, or are looking for ways to improve your messaging efforts, here are five tactical tips we recommend to consumer marketers based on what our respondents said above.

Tip 1: Grow Your Messaging Contact List By Adding More Entry Points

Take advantage of the various online and offline entry points through which your customers can enter into a chat. Most respondents said they message with a company through a "Send Message" button on a social media profile page. That's a reactive approach. You're expecting customers to come to you. That's not what marketers do in other channels. Marketers don't sit around and wait for customers. They go find them and give them reasons to engage with their brand. Why should messaging be any different?

There are many different ways you can proactively grow your messaging contact list. Connect your chatbot to Instagram reels and story reactions. Add pop-up banners in your website or app. Create influencer content and organic posts that send people into your chatbot. Run discount-driven acquisition campaigns where you offer people a coupon if they connect via messaging. This is commonplace in email and SMS. Messaging is no different. You can also use "Click to messaging" ads on your Facebook and Instagram account. Or even include "Scan to message" QR codes on product packaging, out of home advertising, and TV commercials. Instead of treating messaging as a reactive service channel, treat it as a proactive marketing channel.

Tip 2: Automate for Quicker Responses that Make Better Experiences

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Tip 3: Customers Don't Mind Chatbots As Long As They're Helpful

Another reason to automate? Most people don't care if they interact with a human or a chatbot, as long as they can get their questions answered. Marketers can improve their customers' experiences interacting with a chatbot by leveraging conservational AI. Customers have unique intents when they are messaging your business. Conversational AI is how you identify what they mean, and respond intelligently. Make sure you're able to continuously learn from what your customers are messaging you.

Start simple. Automate your FAQs. Build a library of customer intents and scripted responses that drive value for your business. Then, make sure you continuously review incoming messaging data to expand your library of intents and responses. This allows you to optimize your AI and make sure you always have an intelligent response to customer's questions.

Tip 4: Ask for Data and Use It to Personalize

As you engage directly on messaging channels, be transparent. Customers are happy to provide their data to you in a privacy-first way on messaging channels, if you ask for permission. Use that zero-party data to create more personalization for your customers to lead them to products that fit their needs. Use the data to create more relevant and assistive experiences. They will respond by feeling deeper brand loyalty and buying more from your brand.

Tip 5: Turn Messaging Into Your Retention Marketing Channel by Adding Value

Finally, respondents want brands to use messaging in varied ways. Create experiences catered to those different moments in the customer journey to drive more sales. Leverage conversations to help customers find products based on their unique needs. Offer relevant and helpful experiences to customers who are reaching out. Turn your contact list on messaging apps into a powerful CRM marketing channel by continuously engaging them.

You can use messaging platforms to easily send notifications to customers with personalized offers. Use zero party data from conversations to segment your customers, then automate notification campaigns to drive repeat purchases, upsell and cross-sell them. Think of it like email marketing or SMS, only more powerful because of the unique and interactive, two-way format messaging apps offer.

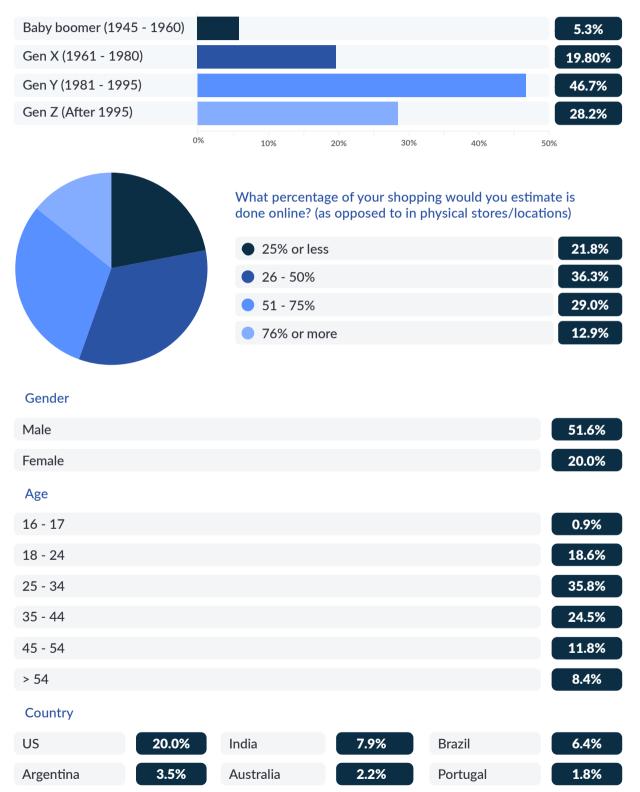
Conclusion

Customers are looking for brands who want to talk with them, not at them. Marketers searching for new channels in which to engage and retain customers can turn to messaging apps like Facebook Messenger, Instagram, or WhatsApp, and can go to where their customers are waiting and ready to have a conversation.

Who We Surveyed: Methodology and Participant Demographics

In order to provide greater context around these findings, here are more details on who we surveyed and the methodology used. Starting on January 30, 2023, we surveyed 1000 individuals from around the world who shop online. The survey was conducted online via Pollfish using organic sampling. Learn more about the Pollfish methodology <u>here</u>.

What best describes your generation?



SPECTRM

Spectrm empowers brands to automate one to one conversations with customers in real-time on search, social and display. Marketing teams use Spectrm to build trust, drive sales and increase loyalty.

Today's consumer chooses convenience. They demand personalized, instant and effortless shopping experiences. They prefer to engage brands where they want, when they want, and how they want.

Our conversational marketing automation platform makes it possible for brands to do exactly that, at scale. We help brands build trust, drive sales and increase loyalty by engaging consumers in real-time with marketing chatbots on the world's largest messaging channels.

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