

CUSTOMER COMMUNICATIONS

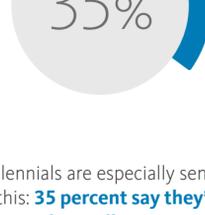
# Survey Captures the Experiences Your Investors Really Want

Broadridge study of more than 1,000 North American investors reveals key insights into CX and communications as a means to more profitable, engaging interactions.

Consumers are increasingly willing to walk away from companies that provide subpar CX.



**1 in 4 have stopped doing business** with a company just because that business did a poor job of personalizing the experience.



Millennials are especially sensitive to this: **35 percent say they're prepared to walk away.**

Investors are expecting more from the communications you send.



Statements are a valuable investor touchpoint that should not be overlooked.

To elevate the value of statements, investors want to see:



Money-saving tips



Peer-comparison data



Financial management advice



Historical/comparative data

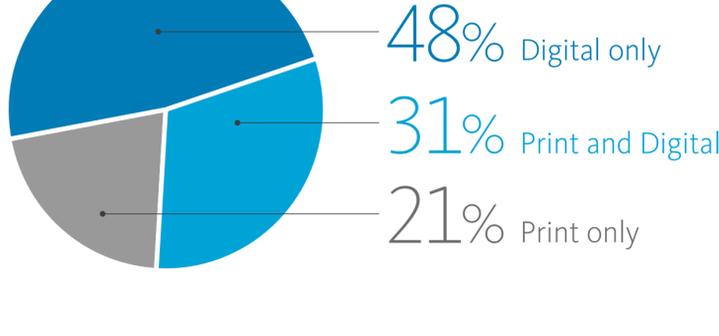
Statements can also impact the bottom line when they include promotions and offers.



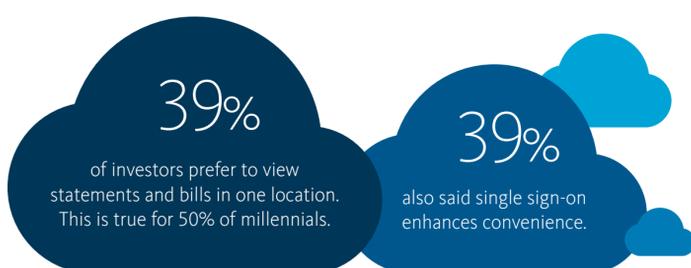
**have purchased a new service or product** after seeing a message in a statement or bill

It's not only what you say, it's where you say it.

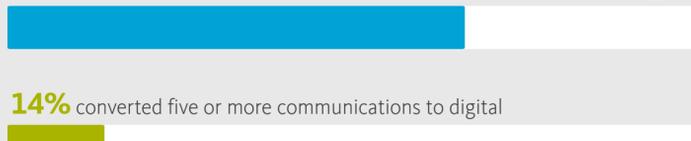
How do investors receive statements and other communications? It's a mix.



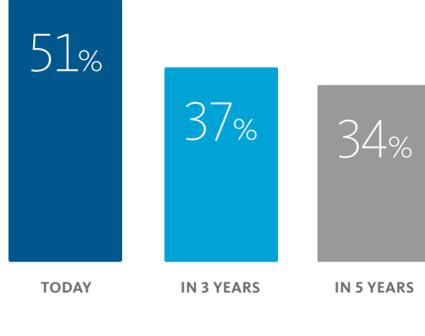
Personal cloud storage offers investors ease and convenience.



Investors are moving to digital, but one in three will still want print in five years.



...but more than one-third of investors will still want print five years from now.



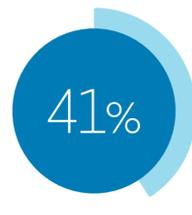
Digital adoption hinges on better communication experiences.



said they would be inclined to choose digital communications if those **communications were more engaging and useful**



said they are interested in **customizable, interactive digital communications**



would be very likely to go paperless if firms could deliver **a better digital experience**

New technologies should be applied to create a richer digital experience.

Investors expressed interest in emerging technologies.



Improving CX and communications results in more profitable, engaging investor interactions.

Successful firms will find ways to bring simplicity, personalization and innovation to statements, creating the experiences their investors crave.

**Broadridge can help.**

For more survey insights, download the report, [CX and Communications Trends for 2019](#)

SOURCE: Annual CX and Communications Survey, Broadridge, 2019

ABOUT THE RESEARCH: The infographic data set includes 1,000 financial services investors. The full survey includes 3,004 residents of North America aged 25+, 2,501 from the U.S. and 503 from Canada; 50/50 split male to female; 95% of respondents are responsible for reviewing finances and paying bills with 65% reporting they are the primary bill payer and 30% sharing the responsibility with someone else in their household.