



RICOH

Human Connection in a Digital Age Survey

Methodology

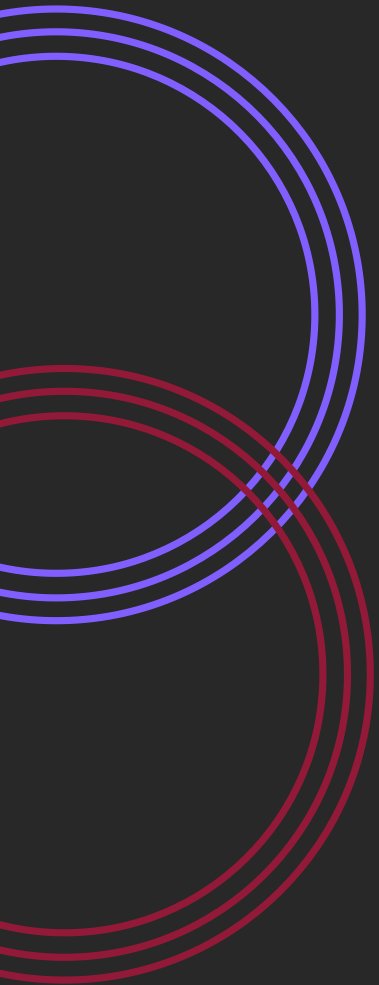
The survey was conducted online from September 3-7, 2025, among a sample of 1,014 U.S. and Canadian adults ages 18-65 who are employed full or part-time.

Sub-Group Analysis:

- Total (all respondents) – n=1,014
- Location:
 - US – n=758
 - Can – n=256
- Employment Status:
 - Full-time – n=832
 - Part-time – n=182
- Generation:
 - Gen Z – n=218
 - Millennial – n=397
 - Gen X – n=320

The survey was fielded by Big Village using opt-in panel members. Quota sampling is used to collect a nationwide sample of respondents who are then weighted by gender, age, region, race/ethnicity, and education to mirror the demographical composition of the population.

This report presents the main findings.



Key Findings

Summary

Human-first connection is a lasting advantage, and it drives loyalty, price tolerance, and productivity gains.

- More than nine-in-10 (94%) say actively investing in authentic human connection creates long-term competitive advantage.
- 87% of Americans are willing to pay more for a product/service if the customer service feels personal (vs. transactional); Canadians are less willing (72%).
- More than four-in-five (85%) are more likely to remain loyal to companies prioritizing genuine human service over automated/self-service options only.
 - Canadians (77%) are less likely than Americans (88%) to remain loyal to these companies.
 - Millennials (88%) are slightly more likely than any other demographic to remain loyal to these companies.

Summary

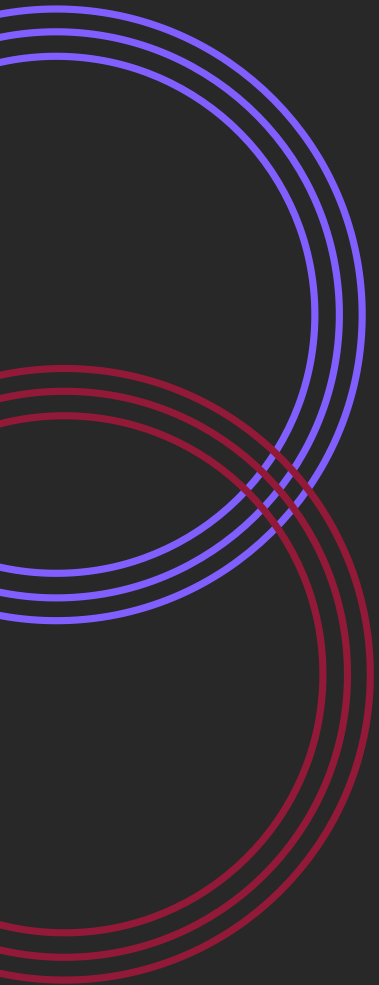
Customer service for some has improved since COVID, but others still perceive “no change.”

- More than a third (37%) rate the quality of customer service received from most companies as better than before the COVID-19 pandemic.
- Another third (32%) of respondents rate the quality the same.
- Canadians (40%) are more likely than Americans (29%) to say quality is unchanged.
- Those who work full-time (38%) are slightly more likely to say the quality is better compared to those who work part-time (35%).
- Gen X respondents (37%) are also more likely to say the quality of customer service has not changed compared to Gen Z (28%) and Millennial (29%) respondents.

Summary

Trust is won by consistent products, real and reachable people, and transparent communication that keeps the trust over time.

- Nearly half (47%) predict brands relying mostly on human support will be the most trusted in the next decade; Gen Z (53%) and Gen X (48%) agree.
 - Two-in-five Millennials predict brands that blend AI and human support will be the most trusted.
- Consistent products and services (59%), help from real people (56%), and transparent and honest communication (47%) are most important in earning respondents' trust in a company
 - Those who work part-time (65%) are more likely to say help from real people will earn their trust compared to those who work full-time (54%); Canadians (61%) are also more likely to say this compared to Americans (55%)
- Gen X are more likely to say consistent products (63%) and help from real people (61%) will earn their trust in a brand compared to other generations.

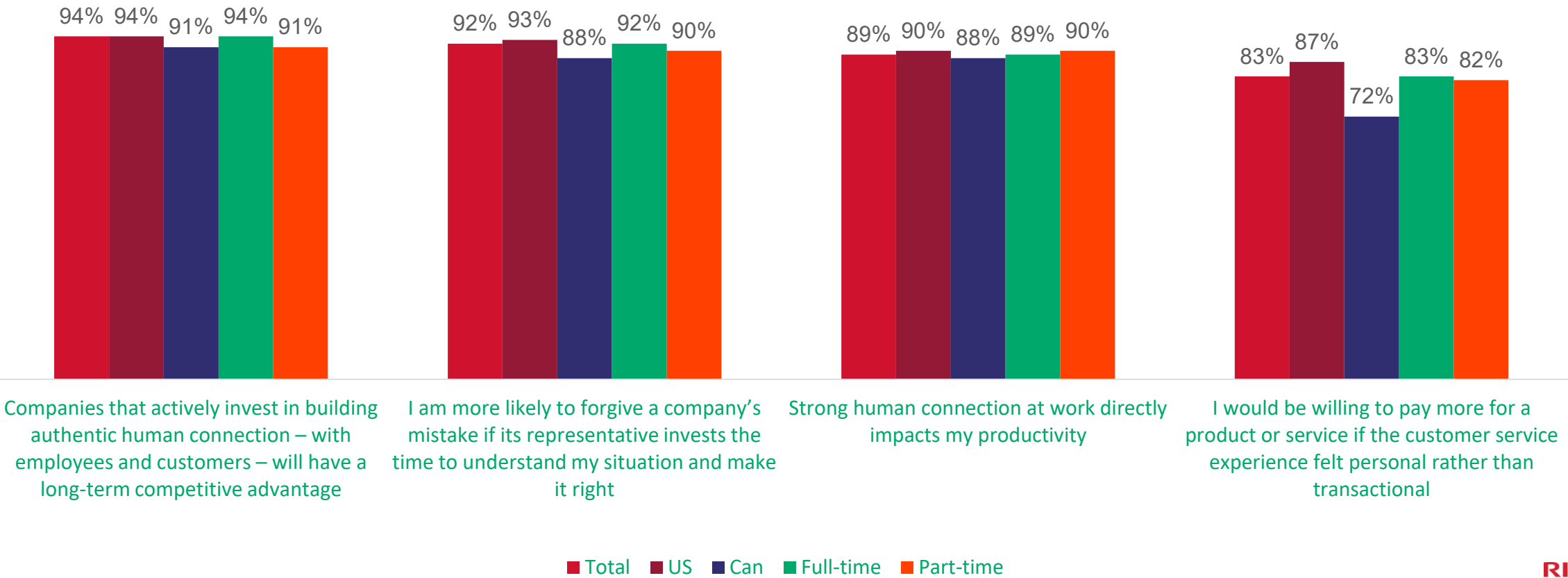


Survey Results

More than nine-in-10 respondents think companies will have a long-term competitive advantage if they actively invest in building authentic human connection

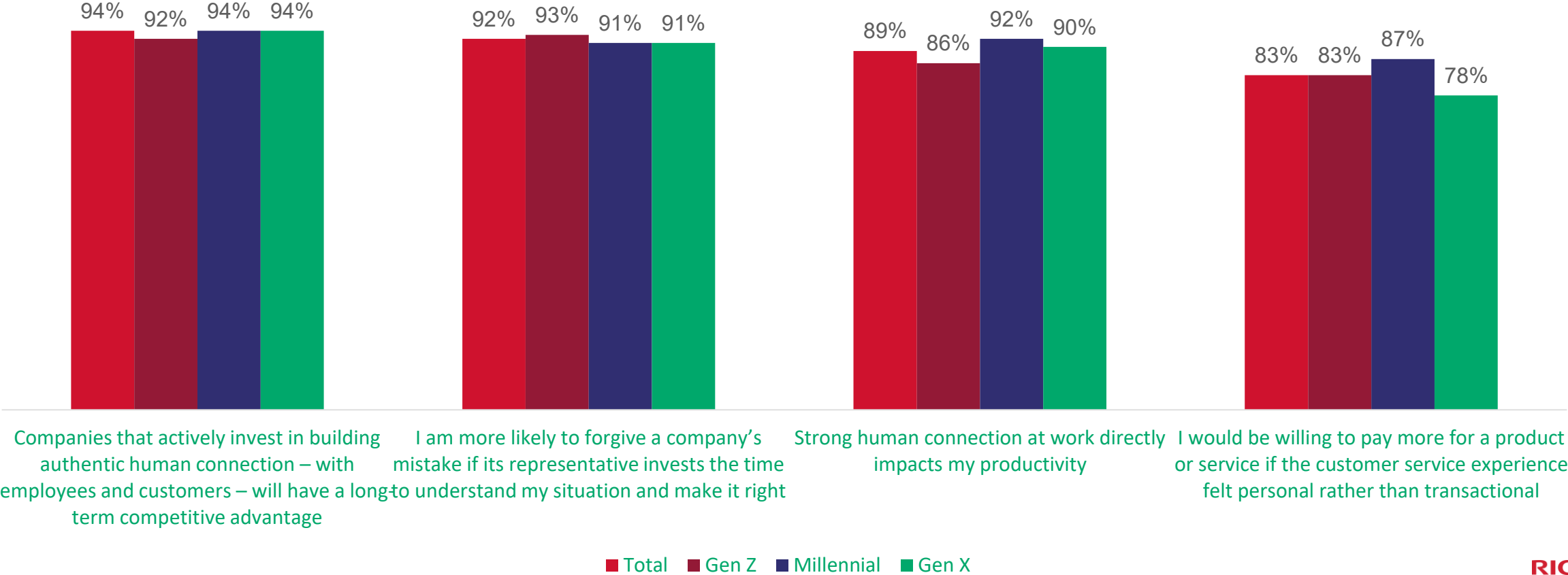
- Canadians are less willing to pay more for a product/service if the customer service experience felt personal rather than transactional compared to Americans

*To what extent do you agree or disagree with the following statements?
[% Strongly/Somewhat agree NET]*



Millennials are slightly more likely than the average to agree strong human connection at work directly impacts their productivity

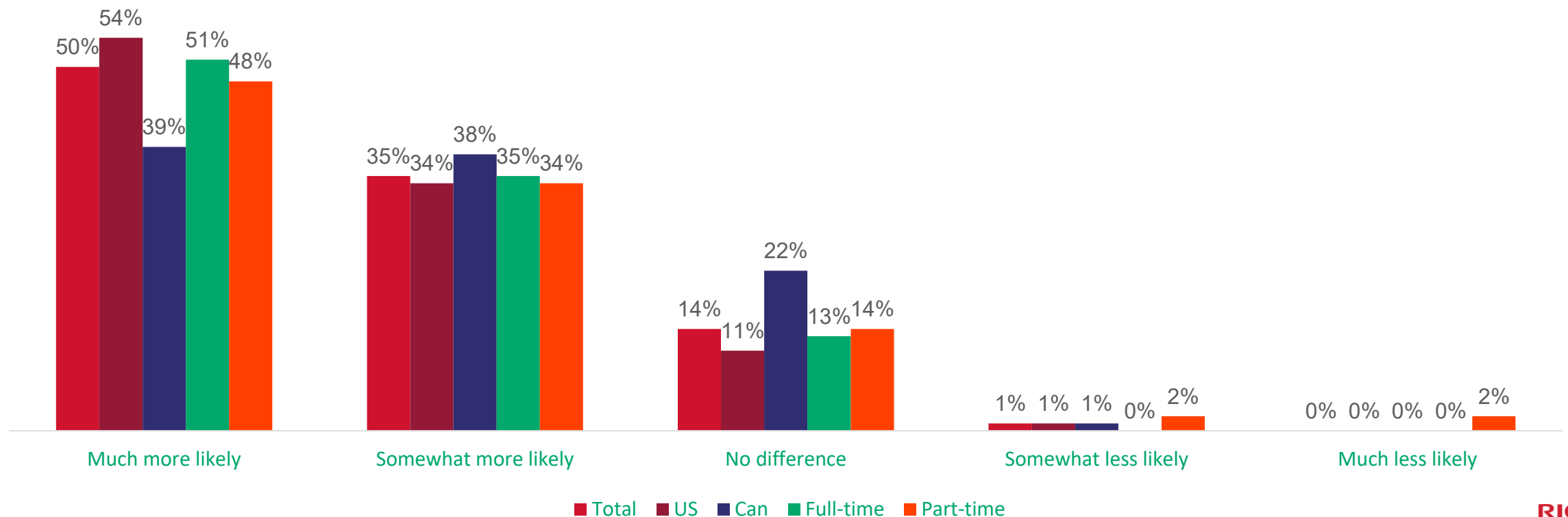
To what extent do you agree or disagree with the following statements?
[% Strongly/Somewhat agree NET]



More than four-in-five respondents are more likely to remain loyal to a company that prioritizes genuine human service over a company that uses automated/self-service options exclusively

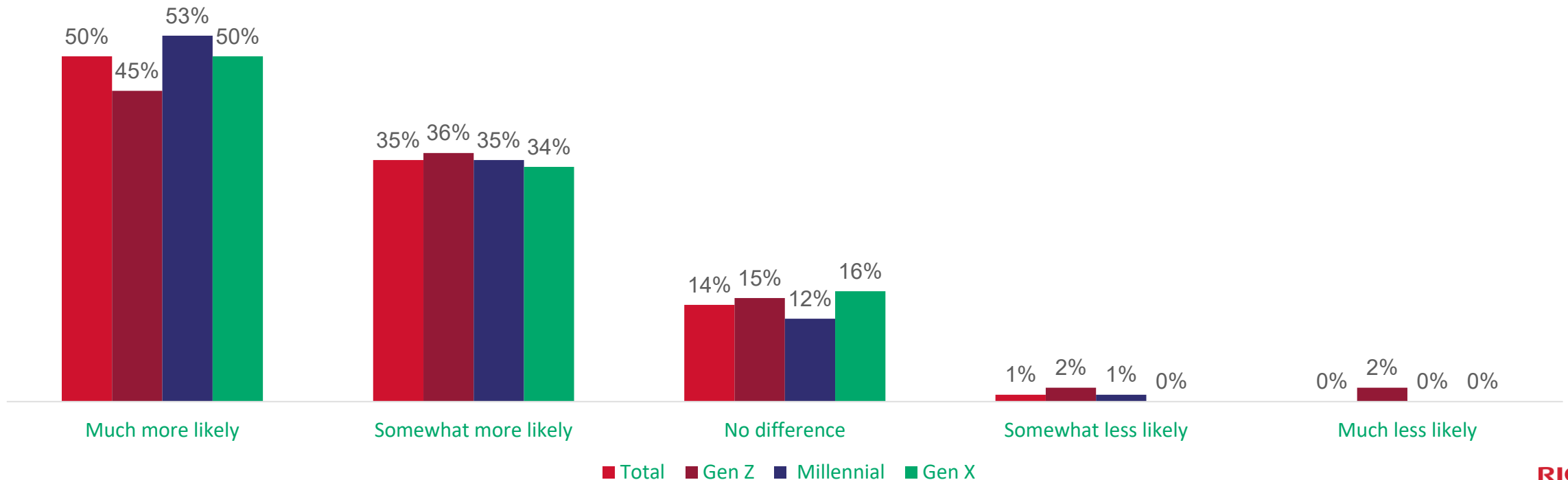
- Canadians are less likely than Americans to say they'd be more likely to remain loyal to a company that prioritizes genuine human service over a company that uses automated/self-service options exclusively

When choosing between brands, how much more likely are you to remain loyal to a company that prioritizes genuine human service (e.g., real people available for support) over a company that uses automated or self-service options exclusively?



Millennials are slightly more likely to remain loyal to a company that prioritizes genuine human service over a company that uses automated/self-service options exclusively compared to other generations

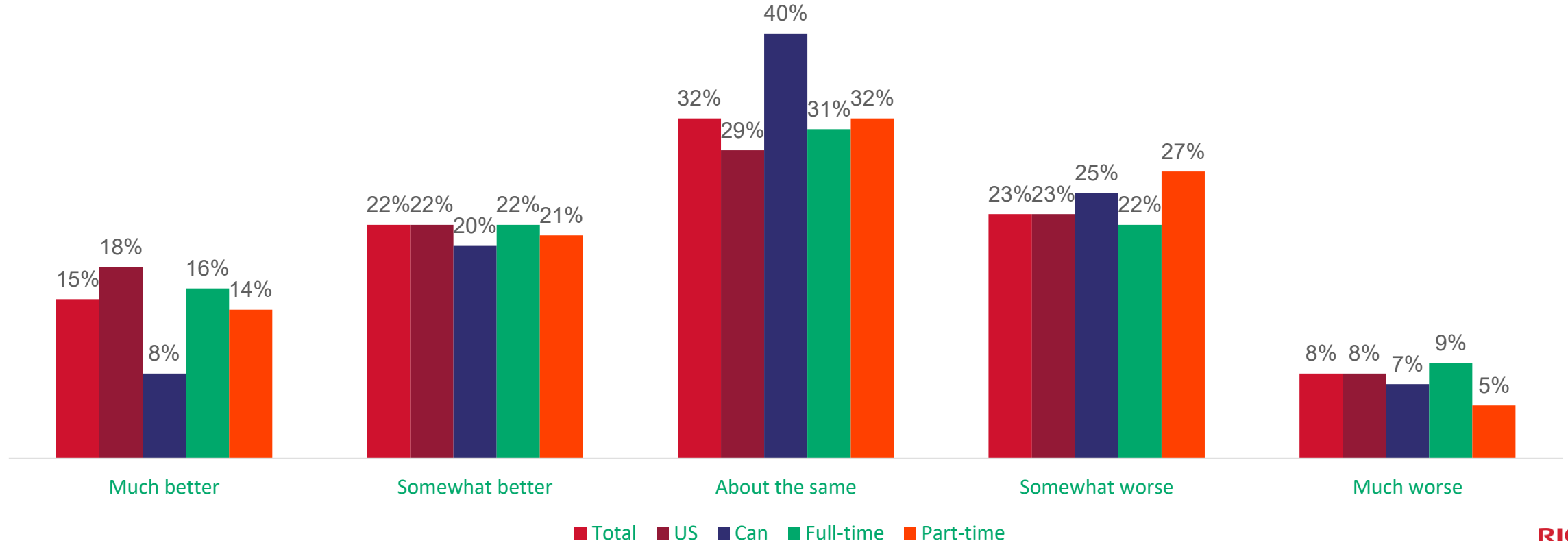
When choosing between brands, how much more likely are you to remain loyal to a company that prioritizes genuine human service (e.g., real people available for support) over a company that uses automated or self-service options exclusively?



More than a third of respondents rate the quality of customer service they've experienced from most companies to be better than before the COVID-19 pandemic

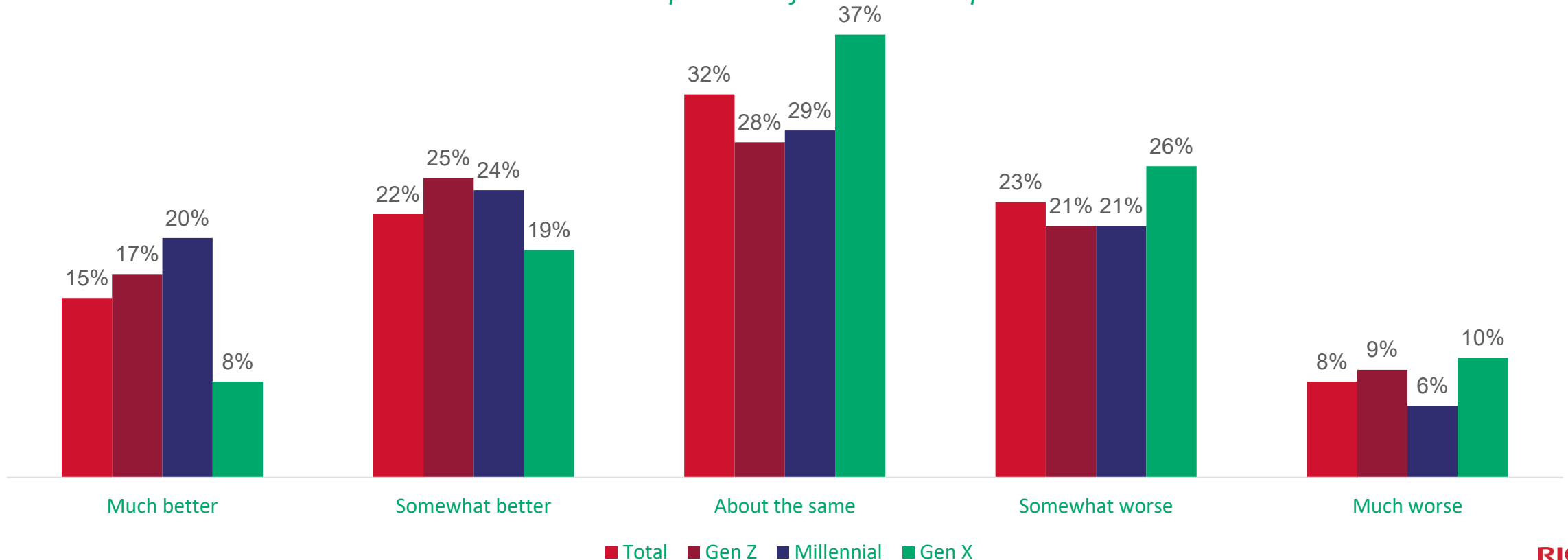
- Canadians are more likely than Americans to say the quality of customer service they've experienced from most companies to be the SAME than before the COVID-19 pandemic

Compared to before the COVID-19 pandemic, how would you rate the quality of customer service you have experienced from most companies?



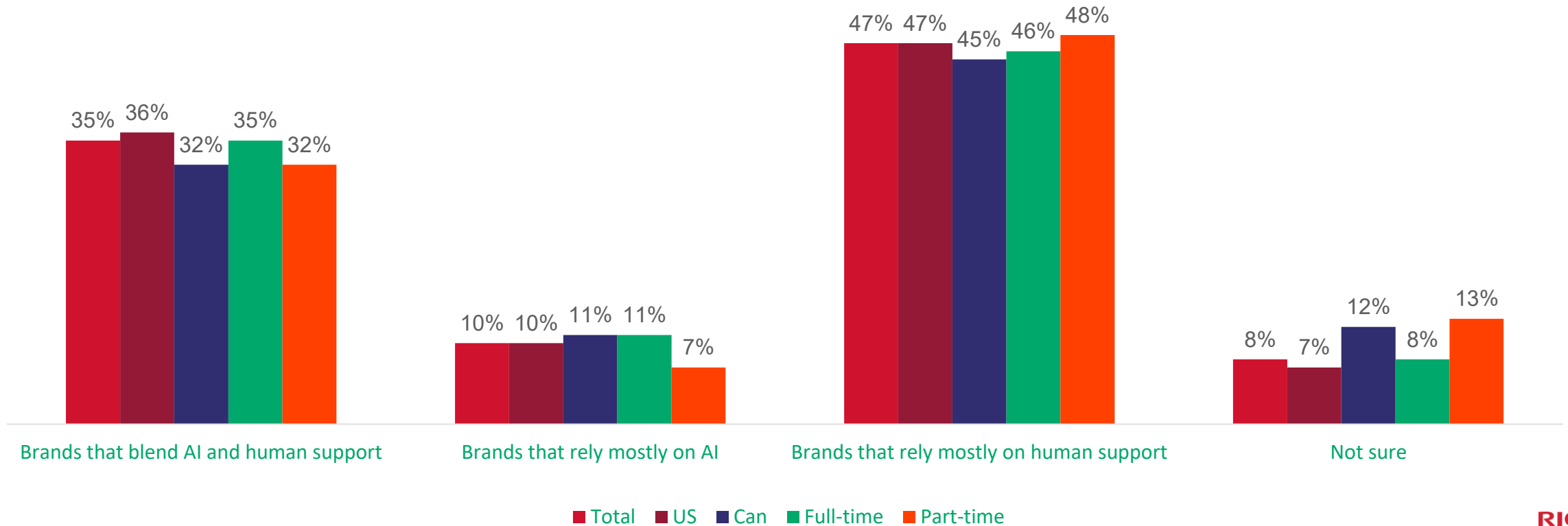
Gen X are more likely than other generations to say the quality of customer service they've experienced from most companies to be the SAME than before the COVID-19 pandemic

Compared to before the COVID-19 pandemic, how would you rate the quality of customer service you have experienced from most companies?



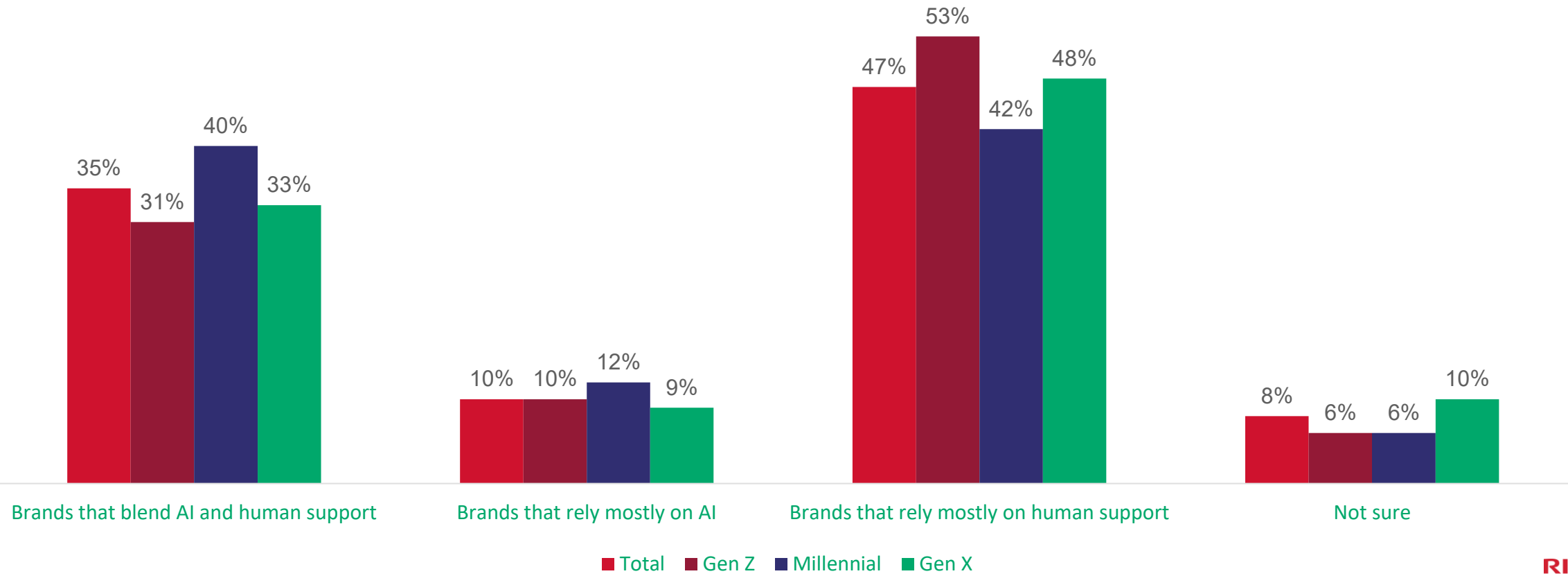
Nearly half of respondents predict brands that rely mostly on human support will be most trusted in the next decade

Which brands do you predict will be most trusted in the next decade?



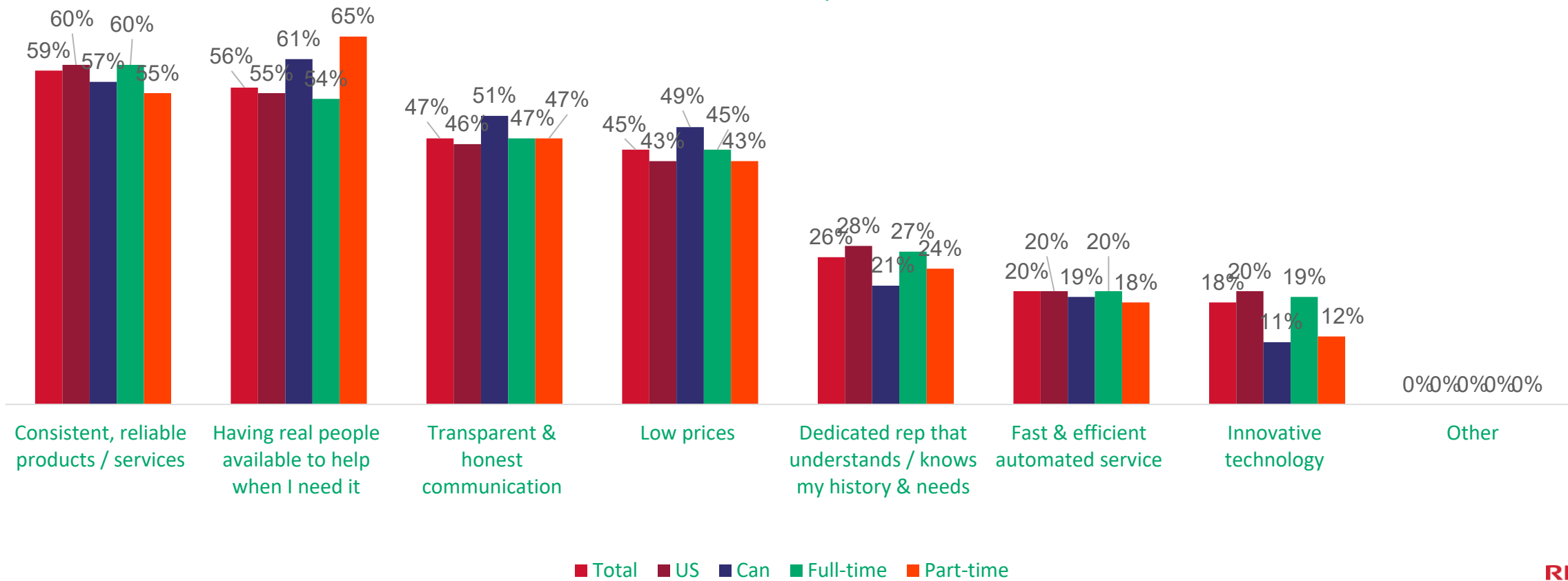
More than half of Gen Z predict brands that rely mostly on human support will be most trusted in the next decade

Which brands do you predict will be most trusted in the next decade?



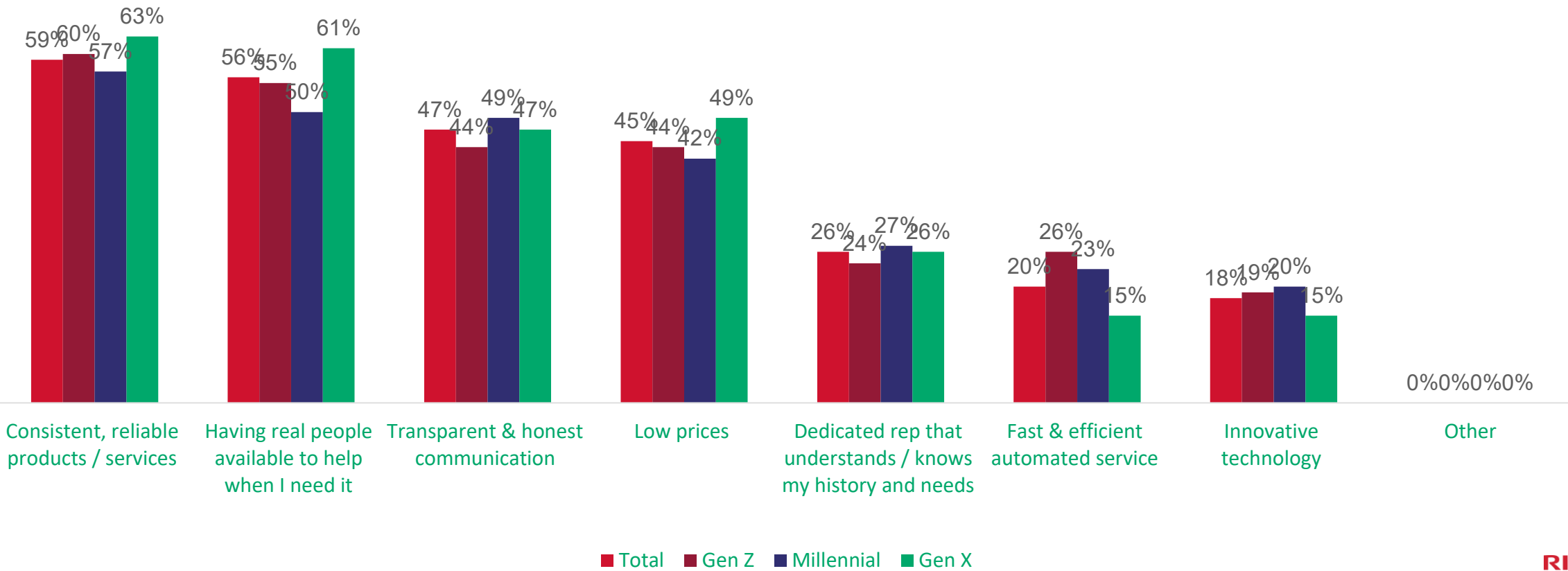
Consistent products and services, help from real people, and transparent communication are most important in earning respondents' trust in a company

When interacting with a company, which of the following are most important in earning your trust? Select up to 3.



Gen X are more likely to say consistent products and services and help from real people will earn their trust in a company compared to other generations

When interacting with a company, which of the following are most important in earning your trust? Select up to 3.





Appendix

Which of the following best describes your current employment status?



Generational breakdown

