

AI Chatbots & Banking Engagement

The purpose of this survey is to understand your experience using AI-powered customer service chatbots in retail banking. We are interested in how you feel about interacting with these chatbots and whether this affects how you engage with your bank's services. Your responses will help us learn more about how chatbots can be improved to better meet customer needs.

1. What is your age?

- ☐ 18-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65 or older
- ☐ Prefer not to say

2. What is your gender?

- ☐ Woman
- ☐ Man
- ☐ Non-binary
- ☐ Other
- ☐ Prefer not to say

3. What is the highest level of education that you have completed?

- ☐ Less than secondary/high school
- ☐ Secondary/high school diploma (or equivalent)
- ☐ Post-secondary qualification
- ☐ Associate degree
- ☐ Bachelor's degree
- ☐ Master's degree
- ☐ Doctoral or professional degree
- ☐ Other
- ☐ Prefer not to say

4. What is your employment status?

- ☐ Employed full-time
- ☐ Employed part-time
- ☐ Self-employed
- ☐ Unemployed
- ☐ Student
- ☐ Retired
- ☐ Unable to work
- ☐ Prefer not to say

5. What is your marital status?

- ☐ Married
- ☐ In a relationship
- ☐ Single
- ☐ Divorced
- ☐ Widowed
- ☐ Separated
- ☐ Prefer not to say

6. What is your country of residence?

- ☐ England
- ☐ Scotland
- ☐ Wales
- ☐ Northern Ireland
- ☐ Outside the UK
- ☐ Prefer not to say

7. What is your ethnic group?

- ☐ White (e.g. British, Irish, other White background)
- ☐ Mixed or Multiple ethnic groups (e.g. White and Black Caribbean, White and Asian)
- ☐ Asian or Asian British (e.g. Indian, Pakistani, Chinese, other Asian background)
- ☐ Black, Black British, Caribbean or African
- ☐ Other
- ☐ Prefer not to say

8. Which bank or banks do you currently use (please select all that apply)

- ☐ Natwest
- ☐ Lloyds Bank
- ☐ Monzo
- ☐ Starling Bank
- ☐ TSB Bank
- ☐ Other

9. What is your primary language?

10. Usage

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I frequently use the bank's chatbot to get support. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Using the chatbot has become a natural part of my banking routine. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| It is easy for me to start a conversation with the chatbot whenever I need help. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I have no difficulty remembering how to use the chatbot features. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I intend to continue using the chatbot in future. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

11. Satisfaction

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I am satisfied with the bank's chatbot service. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot did a good job. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot did what I expected. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am happy with the experience that I had with the chatbot. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

12. Trust

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The chatbot provided accurate information. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I trust the chatbot to protect my personal and financial information. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I believe the chatbot acts in my best interests. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I believe the chatbot provides honest and transparent information. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am more comfortable sharing information with the chatbot than with a human representative. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

13. Ease of Use

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The chatbot was easy to use and navigate. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot's instructions were clear and easy to follow. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot saved me time compared to other ways of getting support. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I rarely felt frustrated while using the chatbot. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot worked as expected without errors. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

14. Helpfulness

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The chatbot provided helpful responses to my queries. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot recommended services or products that were relevant to my needs. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot provided me with enough information to proceed confidently. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot saved me from needing to use other support channels. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I preferred using the chatbot to get help instead of calling or visiting the bank. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

15. Convenience

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I found using the chatbot more convenient than speaking with a human customer service representative. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot was available when I needed assistance. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I could use the chatbot at a time that was convenient for me. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I didn't have to repeat myself multiple times when using the chatbot. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

16. Response speed

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| On average, the chatbot typically responds quickly to my questions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot provided answers without unnecessary delays. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I did not experience long wait times when using the chatbot. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I was able to get help immediately through the chatbot. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

17. Response accuracy

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The chatbot responses were accurate and relevant to my questions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot stayed on topic during the conversation. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot's responses were relevant to my questions. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot often gave incorrect or misleading answers. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot was as accurate as a human customer service representative. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

18. Empathy

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The chatbot recognised my emotions and concerns. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot responded in a caring and considerate way. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot understood my situation well. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot felt cold and impersonal. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot ignored my feelings and focused only on tasks. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

19. Personalisation

| | Strongly Disagree | Disagree | Neutral | Agree | Strongly agree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The chatbot asked me personalised questions to understand my needs better. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot adapted its tone to adjust its communication style. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot remembered my previous responses or preferences during the conversation. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot made my interaction with the bank feel more personal. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The chatbot allowed me to communicate in my preferred language. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

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