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The Havas Barometer to Measure and Pilot Customer Experience Efficiency
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SUCCEEDING IN THE ERA OF EXPERIENCE

We are all pain-point intolerant.
Intolerance has become the disease of our century: Some of us are intolerant to gluten, others to dairy. But if there’s one thing to which we’re all intolerant, it’s pain points. As a society, we’ve never been so impatient. For 53% of Prosumers, waiting is the thing they hate the most in life.¹ And it’s been found that people ditch slow-loading videos online after only two seconds. We expect brands to offer us experiences that are seamless, personalized, and memorable. Anything less is an irritant.

Bad CX means bad business.
When brands fail to meet our expectations, the payback is quite expensive. It takes 12 good experiences to make up for a bad one.² It takes financial effort and lots of resources to repair the damage. Sometimes it is even worse: Over one-third of consumers will leave a brand after a single bad experience.³

On the other hand, when brands manage to offer a good customer experience (CX), it will lead to stronger business performance. Eighty-four percent of companies that devoted resources to improving their CX have seen their revenues increase.⁴ A positive CX can reduce costs by as much as one-third.⁵

CX matters more than anything else for CMOs.
In this context, it’s crucial for chief marketing officers (CMOs) to ask themselves the right questions: What are the moments that matter within the customer experience? In which interactions with customers is it essential to invest? How should they prioritize their efforts?

Havas developed the X Index to answer these questions. Created in partnership with research institute OpinionWay, this proprietary tool serves as a global barometer with which to measure and pilot the customer experience.

THE HAVAS BAROMETER FOR CUSTOMER EXPERIENCE

In 2019, we deployed the X Index across three countries—China, France, and the United States—surveying 19,000 people on more than 150 brands. These brands operate in a variety of industries, from fast food and fashion to transportation and finance, and include both bricks & clicks brands (brick & mortar brands that have gone through the digital transformation) and digital natives.

Sources:
¹Havas, The MEaningful Shift, 2018
²Business Insider, 2016
³Accenture Strategy Global Consumer Pulse Research, 2017
⁴Dimension Data, Oracle, 2019
⁵Deloitte, The True Value of Customer Experiences, 2018
FRANCE 53 BRANDS STUDIED IN 11 CATEGORIES

**RETAIL**
- Carrefour
- E. Leclerc
- Intermarché
- Lidl
- Systeme U
- Nicolas
- Total
- McDonald’s

**FASHION/Sport**
- Galeries Lafayette
- Nike
- Adidas
- Lacoste
- Printemps
- La Redoute
- Sarenza
- Asos

**Travel**
- SNCF
- Air France
- Emirates
- Lufthansa
- EasyJet
- Qantas
- Europcar
- Blablacar

**Hospitality**
- Ibis
- Disneyland Paris
- Novotel
- Airbnb

**Technology**
- Apple
- Netflix
- Darty
- Boullanger
- Netfli

**Mobility**
- Renault/Peugeot
- Audi
- Volkswagen
- Uber

**Utilities**
- EDF
- La Poste

**Home**
- Leroy Merlin
- IKEA
- Manomano

**Beauty**
- Yves Rocher
- Sephora
- Nocibé
- Marionnaud

**Finance**
- Crédit Agricole
- Crédit Mutuel
- PayPal

**E-retail**
- Amazon
- C Discount
- Leboncoin
- Wish

USA 55 BRANDS STUDIED IN 12 CATEGORIES

**Retail**
- Barnes & Noble
- Rite Aid
- Home Depot
- PetSmart
- Target
- Walmart
- Costco

**Fashion/Sport**
- Bloomingdale’s
- Adidas
- Lacoste
- Sketchers
- Nike

**Travel**
- Hertz
- Delta Air Lines
- JetBlue
- American Airlines

**Hospitality**
- Hyatt
- Hilton
- IHG
- Marriott
- Airbnb

**Technology**
- Apple
- Netflix

**Mobility**
- Hyundai
- Jeep
- Toyota
- Chevrole
- Lyft
- Uber

**Fast Food**
- Starbucks
- Dunkin’
- McDonald’s
- Subway
- Pizza Hut
- Chipotle
- Papa John’s

**Home & Energy**
- Casper
- Keurig
- Con Edison

**Beauty**
- Nars
- Sephora

**Finance**
- Citi
- TD Ameritrade
- Wells Fargo
- Bank of America
- Chase
- Charles Schwab

**Insurance**
- New-York Life
- MetLife
- Allstate
- Progressive
- State Farm

**E-retail**
- Amazon
- Jet.com

China 50 BRANDS STUDIED IN 11 CATEGORIES

**Retail**
- Freshhema
- Suning
- King

**Fashion/Sport**
- Li-Ning
- Puma
- Nike
- Adidas
- Lacoste

**Travel**
- Lufthansa
- Emirates
- China Eastern
- Air France
- China Southern Airlines
- Ctrip
- Quinva

**Hospitality**
- Hilton
- Marriott
- Ibis
- Airbnb

**Technology**
- Samsung
- Apple
- Huawei
- Oppo
- Xiaomi
- Vivo

**Mobility**
- Volkswagen
- Peugeot
- Citroen
- Mobike
- Didi Chuxing

**Fast Food**
- Starbucks
- McDonald’s
- Luckin Coffee

**Home**
- IKEA
- Macalline
- Homexoo
- MUJI
- Miniso

**Beauty**
- Sephora
- Marie Dalgar
- Shiseido
- Innisfree

**Finance**
- Bank of Communica
tions
- China Merchants Bank
- Bank of China

**E-retail**
- Taobao
- JD.com
- Amazon
- Taobao
OUR METHODOLOGY

Each brand was analyzed across 31 criteria, with each respondent responsible for rating two brands with which they had interacted during the previous 12 months. As displayed in the chart below, the characteristics centered on all the major steps of the customer journey. Respondents were also asked to rate their overall satisfaction with the experience they had with the brand.

- **Brand:**
  What is the impact of brand items on customer experience perception?

- **Relationship:**
  How do personal interactions (e.g., CRM, customer service) affect the overall perception?

- **Purchase:**
  To what extent do the purchase process and transaction impact the overall experience?

- **Service/Product:**
  How does the customer’s overall satisfaction with the service/product and price impact perceptions of the experience?

- **Overall satisfaction with the customer experience:**

  Thinking about the customer relationship, the purchasing process, and your overall satisfaction with the brand, how do you rate the experience you received as a customer?

30+ ITEMS ANALYZED

**METHODOLOGY**

Looking across all 31 indicators/interactions, each brand received a grade from 0 to 10. Respondents in France were less generous in their scoring than those in the other two markets, suggesting a generally lower level of satisfaction with their customer experiences overall. French respondents returned an average brand score of 7, compared with 7.6 from respondents in China and the US.

**BRAND**

- I share the same values as the brand
- The brand is original, stands out from other brands
- If the brand were to disappear, it would bother me
- The brand pays particular attention to me
- The brand is a brand that keeps its commitments
- The brand makes my life easier
- I am very attached to the brand
- I completely trust the brand

**RELATIONSHIP**

- The information and content available on the mobile app
- The information and content available on the website
- The attention and efficiency of its staff
- Quality of customer service
- Ability to listen and to react quickly on social media
- Awareness of the history/customer profile in order to propose customized offers
- Consistency and clarity of the information delivered between intermediaries
- The relevance of the information that is sent to you
- Ability to thank and reward loyalty
- Ability to understand needs and answer requests
- Ability to offer you unique experiences (private events, exclusive invitations)

**PURCHASE JOURNEY**

- Was not intrusive
- Offered me products/services that I couldn’t find anywhere else
- Was pleasant
- Made me want to engage further with the brand
- Was unique
- Was seamless
- Was very simple
- The delivery conditions were clear
- The way the product was packaged

**PRODUCT/SERVICE EXPERIENCE**

- Overall satisfaction with the use of the service/product
- Overall satisfaction with the price of the service/product
- Overall satisfaction with the quality of the service/product
OUR STATISTICAL APPROACH

\[ Y_i = \beta_0 + \beta_1 X_{i,1} + \ldots + \beta_n X_{i,n} + \epsilon_i \]

The Havas data department designed the X Index by applying a linear regression model. For each individual “i,” the explained variable is written as a linear function of the explanatory variables.

METHODOLOGY

We used univariate correlation analysis to obtain a more robust model:

- We preselected only criteria with the best correlations.
- We checked that there were no autocorrelations between the different criteria.
- Then we used a stepwise approach to select the most relevant criteria in order to build the final X Index model.

DEFINING WHAT MATTERS FOR CX EFFICIENCY

The entire journey matters when it comes to CX: the brand, the relationship between the business and consumer, and the actual purchase experience. This is why CX cannot be the concern of only the communications department, CRM, or e-commerce. It must be at the heart of the company—a focus and responsibility across departments and functions.

METHODOLOGY

The percentages below represent the weight of the coefficients in the model on a 100% basis. This enables us to identify the most discriminating categories of criteria, but also to go further in the analysis of the criteria.

EACH MARKET HAS A SWEET SPOT

The customer experience is tightly linked to market specificities. For instance, we see that brand carries significantly more weight in the CX equation in France. In comparison, respondents in the US most heavily weighted the actual purchase process. In China, relationship stands out as a determining factor.
A GOOD CX IS NOT THE SAME FOR EVERYONE

METHODOLOGY
As exploratory models showed that there are significant differences between countries and business models (bricks & clicks and digital natives), we built 6 distinct models (3 countries x 2 business models).

Bricks & clicks and digital native brands are each aiming for the same CX efficiency. To get there, however, these two business models follow divergent routes. When it comes to bricks & clicks, three things are fundamental to ensuring a positive customer experience: human expertise, emotion, and trust. Being thoughtful, keeping your commitments, and taking away potential pain points have become an obligation. But functional efficiency is not enough: It is now vital for brands to create memorable moments that will please customers and re-enchant the experience. This will give your brand an edge over competitors in the hearts of your customers.

TOP 3 MOST DISCRIMINATING CRITERIA FOR CX EFFICIENCY (Bricks & Clicks)

<table>
<thead>
<tr>
<th></th>
<th>BRICKS &amp; CLICKS</th>
<th>BEYOND THE DIFFERENCES OF BRICKS &amp; CLICKS, HUMAN EXPERTISE, EMOTION AND TRUST ARE KEY</th>
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- The attention and efficiency of its staff: 22%
- I completely trust the brand: 13%
- The purchase journey was pleasant: 13%
- The purchase journey was pleasant: 19%
- I completely trust the brand: 15%
- The attention and efficiency of its staff: 15%

- The brand is a brand that keeps its commitments: 30%
- The attention and efficiency of its staff: 16%
- The purchase journey was pleasant: 15%
By definition, digital natives have built their brand experience online. Not surprisingly, two of the most important criteria are related to the user experience (“the experience was seamless”) and functional benefits (“the information and content available on the website was satisfactory”). A good user experience has become an obligation, but it’s not enough. Beyond these expected benefits, emotions play a big role: “the purchase journey was pleasant.” It’s a way for brands to connect at a deeper level with their customers while differentiating themselves in a crowded and competitive playground.

**TOP 4 MOST DISCRIMINATING CRITERIA FOR CX EFFICIENCY (Digital Natives)**

- The purchase journey was seamless: 24%
- The purchase journey was pleasant: 30%
- The brand is a brand that keeps its commitments: 27%
- The information and content available on the website: 22%
- The brand makes my life easier: 19%
- I completely trust the brand: 12%
- The brand is a brand that keeps its commitments: 17%
- The purchase journey was pleasant: 14%
AND THE WINNERS ARE...

In looking at the highest-scoring brands within our study, we see notable distinctions between the three markets.

**METHODOLOGY**

In order to represent as clearly as possible the distribution of the grades resulting from the X Index model, we ventilated them on a scale from -100 to 100. It allows an easier reading of the brand result and ranking. We defined the 4 intervals [-100;0], [0;25], [25;50], and [50;100] to classify the studied brands into 4 homogenous and clear clusters.

**TOP 10 BRICKS & CLICKS + DIGITAL NATIVES**

**IN CHINA**, the rankings are dominated by travel, hospitality, and transportation brands—speaking to this market’s emphasis on attentiveness, which can be best proffered by human beings.

**IN FRANCE**, three digital natives (PayPal, BlaBlaCar, Netflix) sit atop the rankings. The volatility of customer satisfaction in this market is evident by the fact that five newcomers made it into the top 10 this year, compared with 2018: PayPal, Lacoste, Nike, Ibis, and Apple.

**IN THE US**, most of the brands leading in CX are related to the hospitality industry. Airbnb is still a challenger and has not yet matched the level of satisfaction of Hyatt, Marriott, and Hilton.
CX IS ALL ABOUT PERCEPTIONS

This formula offers a simplified version of CX: At its essence, CX is about the brand’s observed performance minus the consumer’s expectations coming into the experience. Publicly available information regarding the service or product, advertising, the shared takeaways of friends and others—each of these things and more combine to form an impression in the customer’s mind of what to expect from the experience. These expectations, in turn, influence the customer’s perception of how the experience rates and, thus, his or her sense of satisfaction.

In applying the equation, it’s striking to see the radically different CX scores received by a single brand in different markets. A brand that’s a hero in one market might be widely derided in another.

In France, Netflix is seen as a category leader and innovator. It has more subscribers than any other TV streaming service and was responsible for 18 of the top 20 most popular series in that market in 2018. These were original series, not licensed. Not surprisingly, then, Netflix received a high score of 8.0 in France on the factor “Offered me different products/services that I couldn’t find anywhere else.” In the US, by contrast, Netflix scored 6.9 on that factor. In its home market, licensed content accounts for nearly two-thirds of viewing hours and includes a heavy reliance on classic shows such as Friends and The Office. As the company begins to lose many of these series to competitors (e.g., WarnerMedia, NBCUniversal), it is finding that its original programming is insufficient to make up for the loss.

Perceptions of Volkswagen are radically different in China and France. In China, the carmaker is seen as a leader in technological and environmental innovation, having announced plans to electrify its entire range of automobiles by 2030. In France, by contrast, its reputation continues to suffer from the effects of “Dieselgate,” the emissions scandal in which Volkswagen was found to have intentionally programmed its turbocharged direct-injection diesel engines to activate their emissions controls only during emissions testing. The scandal was made worse by the brand’s boasting of its cars’ low emissions.

Amazon is another US powerhouse with a middling ranking in its home market (18th). The brand continues to raise expectations with new technologies and investments such as its acquisition of Whole Foods Market, but interactions on its website—its primary port of entry—underwhelm. Most people in the US use the brand—51.3% of US households hold membership in Amazon Prime, according to eMarketer—but the statement “I am very attached to the brand” scored just 6.5, barely above the average rating of all brands surveyed in the US (6.4). In China, the brand fares far worse. Amazon has done so poorly, in fact—failing to maintain even 1% of China’s e-commerce market—that the company has announced plans to pull out of the market entirely. Consumers in the world’s second-largest economy will still be able to buy Amazon-made electronics and international goods via Amazon Marketplace, but they will no longer have access to locally marketed and produced goods through Amazon China. Analysts suggest a big part of the problem lies in Amazon’s failure to sufficiently localize its customer experience.
THE FOUR SECRETS OF A SUCCESSFUL CUSTOMER EXPERIENCE
1
Brand perception is crucial for CX
Companies recognize the importance of delivering a positive customer experience; they’ve grown obsessed with purchase journeys, seamlessness, and content production. But what came out of our study is the importance of the brand in the overall customer experience. Indeed, our initial experiences with a brand shape our perceptions and opinions of it—and those perceptions may be difficult to change. This explains why the influence of “brand” is so important across the three markets. But what matters most in brand items?

BRANDS, YOU HAVE TO DO WHAT YOU PREACH

The pure-player BlaBlaCar stands out as a brand that succeeds in keeping its commitments, receiving an 8.2 rating on that item in France. First introduced as a car-sharing service for extended journeys, BlaBlaCar has evolved to further embody its mission of “exploring the world of sharing” through the launch of two new services:

BlaBlaBus, a European network of buses that will serve 400 destinations across Europe; and

BlaBlaLines, a car-sharing service dedicated to daily carpooling.

The latter service has allowed the brand to reach a larger public. Its user base now includes more than 14 million carpoolers.

It’s not uncommon for carmakers to warn their customers about the dangers of texting and driving. In the US, Chevrolet has taken a more personalized approach. With its “Call Me Out” app, drivers can have friends and family record messages of their choosing. Should a driver reach for his or her phone while behind the wheel, the app will emit a recorded message admonishing the driver to leave the phone alone and pay attention to the road ahead instead.

Huawei has nabbed 50 commercial 5G contracts outside China, from countries that include South Korea, Switzerland, the United Kingdom, and Finland. According to the company, two-thirds of 5G networks outside China now use its gear. This handsome number of deals came despite ongoing pressure from the US. In May 2019, the Trump Administration put Huawei on a trade blacklist over concerns around the company’s spying capabilities, a move that has effectively banned US companies from doing business with the Shenzhen-based giant. But that is not enough to discourage Huawei from its commitment to build a better, greener, and fully connected world.

Today, actions speak louder than words, and people tend to judge a brand not by its promises but by its ability to keep them. “The brand is a brand that keeps its commitment” was rated the most influential factor in CX in France, representing an astounding 30% of the model for bricks & clicks and 27% for digital natives.
UTILITY AT THE CORE

People expect digital native brands to improve their day-to-day lives. “The brand makes my life easier” represents a substantial portion of the X Index in France (15%) and the US (12%). But our results show that, thus far, brands have failed to fully embrace that role. Compared with respondents in China, French and American customers are significantly less satisfied with the extent to which brands add ease to their lives. Grades across countries are average, and so far not meeting expectations, respectively 6.9 for France, 7.8 for the US, and 7.9 for China.

Consumers in France appreciate that PayPal offers frictionless payment to ease their lives. With its One Touch function, users can seamlessly switch among thousands of sites and pay without having to log in or re-enter their bank details. PayPal’s smart buttons put the customer’s most relevant payment method to the front of the merchant checkout platform. Moreover, eligible purchases are covered by a protection plan.

Too many Americans are confronted with barriers when they need to see a physician, including inadequate transportation, which can cause missed appointments, delayed diagnoses, and often worsening of existing health conditions. Lyft is working to ensure that access to transportation doesn’t stand in the way of people getting the healthcare they need. That’s why they became an enrolled Medicaid provider in Arizona. For patients, this means Lyft will now be a covered transportation option to get eligible patients to and from medical appointments.

Tmall, Alibaba’s retail site, has become the easiest way for people in China to buy international products that are not available in local stores. Previously, Chinese customers had to wait up to 30 days to receive a parcel from abroad; they had to have some knowledge of English to order; they had to have a credit card valid for transactions in foreign currencies; and they were not always able to rely on product authenticity. Tmall changed everything by requiring international brands to permit use of Alipay (Alibaba Group’s mobile-payment method), deliver within 72 hours, and provide returns locations in China. All merchant websites connected to Tmall must be in Chinese, and Tmall verifies authenticity to combat counterfeit goods.

Xiaomi has launched an intelligent home application system that manages and communicates with almost all the home automation devices, from the classics—home alarm, security cameras, lights—to the more unusual smart devices such as rice cookers, air purifiers, robotic vacuums, plant watering systems, game consoles, and coffee makers. Finally, an app that manages all the daily-life equipment in the home.
You’re only as valuable as the people you employ
In a bricks & clicks environment, employees are a brand’s best asset. "The attention and efficiency of staff" accounted for a significant proportion of the X Index in all three markets.

However, brands are only barely meeting expectations. Given this factor’s importance within the CX model, retailers that want customers to visit their stores must invest in people, ensuring they are knowledgeable and capable of meeting—and exceeding—customer expectations.

**BRING BACK THE EXPERTISE**

At a time when most banking is conducted online, Chase is opening a new generation of local branches to provide more personalized services and a stronger neighborhood connection. To create a more convivial environment and friendly relationships with customers, Chase has been careful to recruit new staff locally—seeking people who grew up in the neighborhood and will be able to better understand local concerns. The branches are even dog friendly.

Air France has adapted its services to improve the experiences of passengers from China. The airline has launched a program to help flight attendants and other personnel better understand Chinese culture, including how to convey the proper respect through body language. Moreover, Chinese interpreters are now on board all flights originating or terminating in China. At the Airport Paris-Charles de Gaulle, Air France counters include dedicated reception staff who speak Mandarin and Cantonese to help passengers with departures, arrivals, and connections.

**CONTRIBUTION TO THE X INDEX OF THE ITEM “THE ATTENTION AND EFFICIENCY OF ITS STAFF”**

- **Nicolas**, the French wine merchant, is committed to being staffed by true wine professionals with a passion for the product. To that end, it enrolls employees in a five-week training program, followed by regular training, visits to vineyards, tastings, and more. The goal is to quickly equip each employee with a solid knowledge of wine. The effort is paying off. In operation since 1822, Nicolas now has nearly 500 stores in France and is the number one wine retailer in city centers.

**AVERAGE SATISFACTION GRADE GIVEN BY RESPONDENTS ON “THE ATTENTION AND EFFICIENCY OF ITS STAFF”**

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>7.7</td>
</tr>
<tr>
<td>USA</td>
<td>7.6</td>
</tr>
</tbody>
</table>

Nicolas, the French wine merchant, is committed to being staffed by true wine professionals with a passion for the product. To that end, it enrolls employees in a five-week training program, followed by regular training, visits to vineyards, tastings, and more. The goal is to quickly equip each employee with a solid knowledge of wine. The effort is paying off. In operation since 1822, Nicolas now has nearly 500 stores in France and is the number one wine retailer in city centers.
3

Personalization breeds loyalty
LOYALTY RECOGNITION IS NOT MATCHING CUSTOMERS’ EXPECTATIONS

Over the years, customers have grown more and more demanding, but brands’ ability to reward them has not kept pace. As a consequence, customers are clearly dissatisfied. This is especially the case in France and the US, where the item “Ability to thank and reward for loyalty” received grades of just 5.4 and 6.6, respectively.

In today’s highly competitive environment, companies need more than ever to make their customers feel exclusive and appreciated. Personalization is now an essential pathway to connection. Indeed, “Ability to understand my needs and requests” accounts for 12% of the X Index in China, 8% in France, and 5% in the US. Leveraging personalization makes the relationship between brands and their customers more relevant, and is a way to build loyalty over time.

Shiseido has launched a personalized skincare system for iPhone users that combines an intelligent app and a dedicated product dispenser. The Optune app analyzes and collects data from skin using the phone’s front-facing camera, environmental data (weather, urban pollution, pollen levels), and user data (sleep, menstrual cycle). Results of the analysis are then sent to the device, which contains five serum cartridges called Optune Shots. The cylindrical machine monitors the quantities of Optune Shots remaining, enabling the delivery of replacement cartridges before they are depleted. New cartridges are selected based on the latest skin measurement data and environmental factors.

In China, home decoration has become an issue, as the unregulated market leads to poor-quality materials. So Homekoo decided to help homeowners by making the home decorating process more convenient and transparent. For example, by providing a one-stop online-to-offline purchase service, they’ve created a more personalized experience.

GRADE AVERAGE ON THE ITEM “ABILITY TO THANK AND TO REWARD FOR LOYALTY”

<table>
<thead>
<tr>
<th>Country</th>
<th>Grade AVERAGE</th>
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<tbody>
<tr>
<td>France</td>
<td>5.4</td>
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<tr>
<td>US</td>
<td>6.6</td>
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AVERAGE 7

CONTRIBUTION TO THE X INDEX OF THE ITEM “ABILITY TO UNDERSTAND MY NEEDS AND REQUESTS”

<table>
<thead>
<tr>
<th>Country</th>
<th>Contribution</th>
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<tr>
<td>China</td>
<td>8%</td>
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<tr>
<td>France</td>
<td>12%</td>
</tr>
<tr>
<td>US</td>
<td>5%</td>
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</table>

AVERAGE 7%
4 Emotions are at the heart of CX
Consumers are seeking a customer experience that is frustration and hassle free. Whether interacting with a brand in the physical world or online, they want their purchase journey to be simple and seamless.

In a world in which fluidity and simplicity are expected, the emotional dimensions of the customer experience become all the more vital. The purchase journey was pleasant made a significant contribution to the X Index in each market, reaching a high of 30% for digital natives in China. Across categories and cultures, emotionally memorable moments—“signature moments”—create value for both brands and their customers.

In Hong Kong, K11, the first “art mall,” offers visitors a premium shopping experience combined with art exhibits throughout the mall. To further enchant the purchase journey, the exhibits are enhanced with a unique and personal AI experience: An avatar acts as a personal guide, providing shoppers with details about the art, the background of the artists, and the development of the exhibits.

To delight customers, Marriott has created M Live, a real-time command center staffed by a team that analyzes hundreds of publicly available social posts on Instagram, Twitter, and Weibo every hour across Marriott’s 6,100+ properties. They then filter the geo-tagged social posts and draw on the insights to provide surprise and delight to their customers (whether it’s providing a bottle of champagne to celebrate a wedding proposal, offering personalized towels to swimmers, or something else).
Companies have grown obsessed with making their customer journeys seamless. And rightly so, if we look at the results of the X Index. Consumers expect brands to offer “pain-point free” experiences, both simple and seamless.

But lately, it has become the only horizon for most brands. Actually, delivering a smooth CX is more of a starting point to any good experience, rather than a destination or the ultimate achievement. Thus, choosing the path of functionality won’t be enough for brands, as it’s also a path already led by most logistics brands—Amazon and Alibaba, to name a few.

“Logistics brands” may have won the battle of functionality, but the war is not over yet. To quote Emily Weiss, founder of Glossier, “Amazon really solved buying, but it killed shopping in the process.” This observation echoes one of the major findings of our study. **Going back to the very essence of any experience with products and services, customer experience is first and foremost a brand matter.**

The challenge for companies in the future lies in their ability to infuse their “brand signature” in any experience, to craft what we call “signature moments,” and make those moments proprietary, emotional, memorable, and valuable for people. You might remember your first experience with Uber, when the driver offered you a small bottle of water after you entered the car. Or a favorite hotel that left a treat in your room to express appreciation for your loyalty. Such signature moments address the tensions of modern life and add a long-absent element of enchantment to the customer experience. They give people a reason to go into a store, to interact with a salesperson, to choose one e-retailer over another, to engage with a brand and be loyal to it.