

X INDEX

2024

**THE NEW CX CONTRACT:
GOING BEYOND EXPECTATIONS**



THE TRIFECTA FORMULA FOR A WINNING CX

In the context of the current economic climate, marked by significant inflation and its impact on consumer purchasing power, brands are facing a transformative challenge in customer experience (CX). With 48% of consumers perceiving a decline in their purchasing power, and an increasing consumer trend of having to make trade-offs due to financial constraints, the **stakes for delivering exceptional CX have never been higher.**

Consumers are more demanding than ever and exhibit a willingness to abandon brands not only for inflationary pressures but also for bad customer experiences. An eye-opening 59% of consumers, on average, say they have already stopped buying a brand because of one bad experience.

Sobering stats like that have raised the bar for customer experience. Gone are the days where simply meeting expectations is sufficient. Businesses are now required to adopt **a holistic approach that combines functionality, emotional engagement, and going above-and-beyond customers' expectations.** Brands that can build up these three key elements will be the most successful when it comes to CX.

This report will drill down deeper on these findings from our sixth annual X INDEX survey.



THE HAVAS BAROMETER FOR CUSTOMER EXPERIENCE

In 2018, Havas CX partnered with research institute OpinionWay to develop the X INDEX barometer, a proprietary research tool that helps clients determine and measure the most critical factors in customer experience. The newest edition covers 9 markets (Brazil, Argentina, France, India, Mexico, Portugal, Spain, the United Kingdom, and the United States) and draws from a survey of 55,000 consumers asked to evaluate the performance of 525 brands.



ARGENTINA 50 BRANDS STUDIED IN 14 CATEGORIES



AUTOMOTIVE
CITROEN
PEUGEOT
RENAULT
VOLKSWAGEN



QUICK SERVICE RESTAURANT
BURGER KING
MCDONALDS
MOSTAZA



TECH
LG
SAMSUNG
SONY



HOME
EASY



MOBILITY / TRAVEL
AL MUNDO*
BUQUEBUS
CABIFY*
DESPEGAR*
DIDI*
FLY BONDI*
IBERIA
TURISMO CITY*



FASHION/SPORT
ADIDAS
NIKE
PUMA



BANKING
BANCO GALICIA
BBVA
HSBC
MACRO



BEAUTY/HEALTH
AVON
DERMAGLOS
LOREAL
NATURA



ENERGY/UTILITIES
SHELL



TELECOM
CLARO
MOVISTAR
PERSONAL
TUENTI



RETAIL
CARREFOUR
COTO
DISCO
JUMBO
VEA



E-RETAIL
MERCADO LIBRE*
PEDIDOS YA*
RAPPI*



FINANCIAL SERVICES
MERCADO PAGO*
UALA*



LEISURE/ ENTERTAINMENT
DISNEY +*
HBO MAX*
NETFLIX*
SPOTIFY*
STAR +*



BRAZIL 50 BRANDS STUDIED IN 11 CATEGORIES



AUTOMOTIVE
CHEVROLET
CITROEN
HONDA
JEEP
PEUGEOT
RENAULT
VOLKSWAGEN



BEAUTY/HEALTH
ALICE*
NATURA



E-RETAIL
BELEZA NA WEB*
IFOOD*
MAGALU*
MERCADO LIVRE*
RAPPI*
SHEIN*
ZE DELIVERY*



TELECOM
CLARO
TIM
VIVO



PETCARE
ZEEDOG*



FASHION/SPORT
ADIDAS
NIKE



QUICK SERVICE RESTAURANT
BURGER KING
MCDONALDS
ENJOEI
WESTWING



MOBILITY / TRAVEL
123 MILHAS*
99*
BUSER*
DECOLAR*
GOL*
LATAM*
UBER*
VELOE*



SPECIALIZED RETAILER
ENJOEI*
WESTWING*



FINANCIAL SERVICES
BANCO INTER*
C6*
CAJU*
LIVELO*
MERCADO PAGO*
NUBANK*
PICPAY*
QUINTO ANDAR*
SWILE*
XP*



LEISURE/ ENTERTAINMENT
DISNEY +*
GLOBOPLAY*
HBO*
NETFLIX*
SPOTIFY*
STAR +*

*Pure-player brands

FRANCE 50 BRANDS STUDIED IN 14 CATEGORIES



AUTOMOTIVE
AUDI
CITROEN
DACIA
RENAULT
VOLKSWAGEN



BEAUTY/HEALTH
MARIONNAUD
NOCIBE
SEPHORA
YVES ROCHER



HOSPITALITY
CLUB MED



BANKING
CREDIT AGRICOLE
CREDIT MUTUEL
SOCIÉTÉ GÉNÉRALE



E-RETAIL
AMAZON*
C DISCOUNT*
LA REDOUTE*
LE BON COIN*
VINTED*



FASHION/SPORT
SPORT
ADIDAS
DECATHLON
GO SPORT
NIKE



HOME
IKEA
LEROY MERLIN
MANOMANO*



SERVICES
LA POSTE



FASHION/LUX
H&M
LACOSTE



TECH
APPLE



RETAIL
GALERIES LAFAYETTE
PICARD
PRINTEMPS



MOBILITY/TRAVEL
AIR FRANCE
EUROPCAR
EUROSTAR
HERTZ
OUIGO
SIXT
SNCF CONNECT*
TGV INOUI
TRANSAVIA



SPECIALIZED RETAILER
BOULANGER
DARTY
FNAC



LEISURE/ ENTERTAINMENT
AMAZON PRIME VIDEO*
CANAL + / MY CANAL*
DISNEYLAND PARIS
FUTUROSCOPE
NETFLIX*
PARC ASTERIX



INDIA 50 BRANDS STUDIED IN 9 CATEGORIES



AUTOMOTIVE
TATA MOTORS
KIA
NEXA
HYUNDAI
CITROËN



BEAUTY/HEALTH
TATA PALETTE*
TIRA BEAUTY*
NYKAA*
SEPHORA
HERBALIFE



E-RETAIL
TATA CLIQ LUXURY*
AJIO LUXE*
ZEPTO*
BIG BASKET*
SWIGGY*
ZOMATO*



BANKING
BANDHAN
ICICI
HDFC
INDUS IND BANK
DBS
KOTAK MAHINDRA



FASHION/LUX
ZARA
H&M
UNIQLO



HOSPITALITY
ITC
AIRBNB*
TAJ
OBEROI
OVO



TECH
APPLE
SAMSUNG
IFB
JBL
VIVO
BOAT



INSURANCE
ACKO*
MAHINDRA PAYBIMA
AEGON*
MAX LIFE
INSURANCE*
POLICY BAZAR
DIGIT*



FINANCIAL SERVICES
UPSTOX*
GROWW
ZERODHA
CRED*
UTI
BAJAJ FINSERVE
PAYTM*
BANDHAN MUTUAL
FUND

*Pure-player brands



MEXICO 50 BRANDS STUDIED IN 12 CATEGORIES



AUTOMOTIVE

NISSAN
KIA
HYUNDAI
MG
CHIREY
GENERAL MOTORS
VOLKSWAGEN
TOYOYA



BEAUTY/HEALTH



MOBILITY

AEROMEXICO
VIVA AEROBUS
VOLARIS



RETAIL

LIVERPOOL
PALACIO DEL
HIERRO
SEARS
SUBURBIA
COPPEL
WALMART
SORIANA
CHEDRAUI



BANKING

BANORTE
HSBC
BBVA
CITI BANAMEX
NU BANK



FASHION/SPORT

PUMA
VANS
NIKE
ADIDAS



SPECIALIZED RETAILER

OFFICE DEPOT
MINISO



LEISURE/ ENTERTAINMENT

NETFLIX*
AMAZON PRIME
VIDEO*
VIX*



HOME

THE HOME DEPOT
IKEA
GAIA



TELECOM

TELCEL
TELEFONICA
ATT



QUICK SERVICE RESTAURANT

KFC
DOMINOS
BURGER KING
LITTLE CAESAR'S
STARBUCKS
MCDONALDS
CIELITO QUERIDO



E-RETAIL

AMAZON*
MERCADO LIBRE*
SHEIN*



PORTUGAL 50 BRANDS STUDIED IN 15 CATEGORIES



BEAUTY/HEALTH

CUF
JOAQUIM CHAVES
LUSIADAS
LUZ
PERFUMES E COMPANHIA
SEPHORA
WELLS



E-RETAIL

ALIEXPRESS*
AMAZON*



TECH

APPLE*
SAMSUNG
XIAOMI



RETAIL

CONTINENTE
LIDL
PINGO DOCE



BANKING

CGD
MILLENNIUM BCP
NOVO BANCO
REVOLUT*
SANTANDER TOTTA



FASHION/SPORT

ADIDAS
LACOSTE
NIKE
ZIPPY



HOME

GATO PRETO
IKEA
LEROY MERLIN



ENERGY/ UTILITIES

EDP
ENDESA
GALP



SERVICES

CTT
GLOVO*
UBER EATS*



QUICK SERVICE RESTAURANT

BURGER KING
MCDONALDS
PIZZA HUT



SPECIALIZED RETAILER

FNAC
WORTEN



LEISURE/ ENTERTAINMENT

NETFLIX*



TELECOM

MEO
NOS
VODAFONE



INSURANCE

AGEAS
FIDELIDADE
MEDIS
TRANQUILIDADE



MOBILITY

EASYJET
TAP
UBER*
VIA VERDE

*Pure-player brands



SPAIN 100 BRANDS STUDIED IN 16 CATEGORIES



AUTOMOTIVE

AUDI
BMW
HYUNDAI
MERCEDES BENZ
NISSAN
POLESTAR*
TESLA
TOYOTA
VOLVO



HOSPITALITY

AIRBNB*
BOOKING*
MELIA
NH HOTELES
RIU



RETAIL

ALCAMPO
ALDI
CARREFOUR
EL CORTE INGLES
LIDL
MERCADONA



ENERGY/UTILITIES

BP
CEPSA
ENDESA*
HOLALUZ*
IBERDROLA
NATURGY
REPSOL
TOTAL ENERGY*



FASHION/SPORT

ADIDAS
NEW BALANCE
NIKE



FASHION/LUX

ASOS*
H&M
MASSIMO DUTTI
PRIMARK
SHEIN
ZARA



MOBILITY

AIR EUROPA*
ALSA*
BLABLACAR*
CABIFY*
IBERIA
IRYO*
OUIGO*
RENFÉ
RYANAIR
UBER*



HI-TECH

APPLE
HUAWEI
LG
SAMSUNG
SONY
XIAOMI



QUICK SERVICE RESTAURANT

BURGER KING
MCDONALDS



BANKING

BANCA MARCH
BANKINTER
BBVA
BIZUM
EVO
ING
N26*
REVOLUT*
SANTANDER



TELECOM

DIGI / DIGIMOBIL
JAZZTEL
LOWI
MASMOVIL
MOVISTAR
O2
ORANGE
SIMYO*
VODAFONE
VOIGO



LEISURE / ENTERTAINMENT

AMAZON PRIME VIDEO*
APPLE TV*
DISNEY+*
FILMIN*
HBO*
MOVISTAR PLUS*
NETFLIX*
SPOTIFY*



E-RETAIL

AMAZON*
GLOVO*
WALLAPOP*



HOME

IKEA
LEROY MERLIN
MAISONS DU MONDE
WESTWING*



SERVICES

CORREOS EXPRESS
DHL
GLS
SEUR



INSURANCE

INSURANCE
LINEA DIRECTA
MAPFRE
MUTUA MADRILENA
PELAYO SEGUROS
SANTALUCIA
SECURITAS DIRECT
VERTI*



UK 50 BRANDS STUDIED IN 17 CATEGORIES



AUTOMOTIVE

AUDI
SEAT
SKODA
TESLA
VOLKSWAGEN
VOLVO



INSURANCE

AVIVA*
COMPARE THE MARKET*
MONEYSUPERMARKET*



LEISURE/ ENTERTAINMENT

NETFLIX*
SPOTIFY*



RETAIL

ARGOS
ASDA
GO OUTDOORS
JOHN LEWIS
TESCO



HOSPITALITY

AIRBNB*
BOOKING.COM*



FASHION/SPORT

ADIDAS
NIKE



PETCARE

PETS AT HOME



BEAUTY/HEALTH

AESOP
BOOTS
HOLLAND & BARRATT
SUPERDRUG



TELECOM

GIFFGAFF*
O2



SERVICES

ENGLISH HERITAGE
HELP FOR HEROES
NATIONAL TRUST
NECTAR*
ROYAL BRITISH LEGION



QUICK SERVICE RESTAURANT

COSTA
MCDONALDS
STARBUCKS



FINANCIAL SERVICES

PAYPAL*
REVOLUT*



TECH

APPLE



E-RETAIL

AMAZON*



BANKING

BARCLAYS
HALIFAX
HSBC
LLOYDS



FASHION/LUX

H&M
RIVER ISLAND
THE WHITE COMPANY



MOBILITY

AVANTI
BRITISH AIRWAYS
GWR
UBER*

*Pure-player brands



USA 75 BRANDS STUDIED IN 19 CATEGORIES



AUTOMOTIVE

BMW
MAZDA
RIVIAN*
TESLA



BEAUTY/HEALTH

E.L.F.*
GLOSSIER
GOODRX*
HEADSPACE*
HIMS & HERS*
MERIT*
ONEMEDICAL*
SEPHORA
TREND
ULTA
VANISH*



BANKING

CAPITAL ONE
CITI
TRUIST
WELLS FARGO



SPECIALIZED RETAILER

CUBBITS



TELECOM

MINT MOBILE*
T-MOBILE



QUICK SERVICE RESTAURANT

DOMINOS PIZZA
MCDONALDS
STARBUCKS



FINANCIAL SERVICES

AMEX
FIDELITY*
MASTERCARD*
PAYPAL*
ROBINHOOD*



RETAIL

7-ELEVEN
ALDI
CRAYOLA
KEURIG
NESPRESSO
NORDSTROM
PUBLIX
WARBY PARKER
WHOLE FOODS



INSURANCE

HEALTHY PAWS*
LEMONADE*
PROGRESSIVE



HOSPITALITY

AIRBNB*
MARRIOTT



TECH

APPLE
FITBIT*
INTEL*
WHOO*P*



MOBILITY

AMERICAN AIRLINES
CARVANA*
DELTA
HIPCAMP*
IHG*
UBER*



LEISURE/ ENTERTAINMENT

BETMGM*
DISNEY.*
LEGO
LOTTO.COM*
MAX (HBO)*
NETFLIX*
TOPGOLF



PETCARE

PEDIGREE*



SERVICES

FEDEX
HAPPY RETURNS



FASHION/LUX

ALLBIRDS
LACOSTE
LOUIS VUITTON
RIMOWA



HOME

IKEA



E-RETAIL

BARBIE*
DOLLAR SHAVE CLUB*
NET-A-PORTER*
POSHMARK*
SEAMLESS*



FASHION/SPORT

NIKE

*Pure-player brands

OUR 2024 METHODOLOGY

First, we invited consumers to rate each of 23 items on a scale of 0 to 10, quantifying its impact on their perceptions of experiences. These items range from the **functional** side of the experience (*it's easy to find what I'm looking for / I'm not wasting time; it's efficient*) to the **emotional** (*the in-store/online experience is enjoyable and engaging / this brand often goes beyond my expectations*) and from the **personal** (*this brand is centered on my needs as a customer / this brand acknowledges and rewards my loyalty well*) to the **collective** (*this brand makes me feel part of a community / this brand embraces diversity*).

23 ITEMS

(0 to 10 rating) DEFINING THE PERCEPTION OF THE EXPERIENCE BY CUSTOMERS

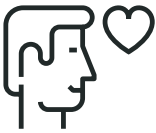


FUNCTIONAL

It's easy to find what I'm looking for
I'm not wasting time; it's efficient

The brand always answers my requests promptly

The brand can quickly adapt its shopping experience to external factors



EMOTIONAL

The in-store/online experience is enjoyable and engaging

I'm always pleasantly surprised by what this brand has to offer

The experience with this brand is enjoyable and engaging

This brand often goes beyond my expectations

The brand uses technology to deliver an innovative experience



PERSONAL

The brand is centered on my needs as a customer

The brand gives me helpful recommendations (as experts would)

The brand offers me the same experience whether I buy online or in-store

The communications I receive from the brand are personalized to my needs

The brand respects my privacy and my personal data

The brand acknowledges and rewards my loyalty well

The brand takes my advice and feedback into account

This brand provides great value when I provide my data



COLLECTIVE

The brand demonstrates it cares about its impact on the planet

The online and in-store experience is user-friendly for people with disabilities

The brand values its employees throughout the shopping experience

The brand makes me feel part of a community

The brand embraces diversity

The online experience is user-friendly for people with disabilities



1 SCORECARD

EVALUATING TOUCHPOINTS THROUGHOUT THE ENTIRE CONSUMER JOURNEY

As a second step, we asked consumers to rate two brands across each touchpoint (from the online or in-store experience to its social media and CRM program) and evaluate the brand's customer journey. This allowed us to assess individual brands on their overall performance, as well as their strengths and weaknesses along the journey. To qualify, each respondent had to have made at least one purchase from the brand in the previous 6 months.

OUR STATISTICAL APPROACH

HIERARCHICAL LINEAR REGRESSION

$$Y_i = \beta_0 + \beta_{0,m} + (\beta_1 + \beta_{1,k})X_{i,1} + \dots + (\beta_n + \beta_{n,k})X_{n,1} + \epsilon_i$$

Once we captured the respondent data, we applied a data model of hierarchical linear regression to determine which are the most discriminating criteria of the experience, and we ranked each brand according to its score, creating the **X INDEX**.

The model defines the most discriminating criteria (among 23 items) in determining what makes a compelling customer experience. We incorporated specific statements to build models for two typologies: **bricks & clicks (B&C)** brands—retailers that maintain brick-and-mortar stores in addition to selling online—and **internet-only retailers (pure players)**. For the modeling phase, we used a “mixed effects model” to add another level of detail and distinguish the effects of sectors and brands on CX satisfaction.

We then applied a data model of hierarchical linear regression to determine the top 10 most discriminating criteria of the experience, and we established a ranking of the brands according to their score: **the X INDEX**.

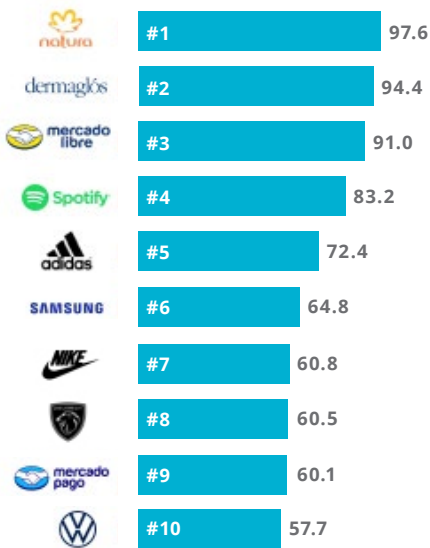
METHODOLOGY

- We ran a descriptive analysis to check autocorrelations among the various criteria.
- We ran a lasso regression to eliminate less important features.
- We finalized the features selection using the results of the lasso regression and the levels of variability per variable (depending on sector) extracted from a first hierarchical linear model by default.

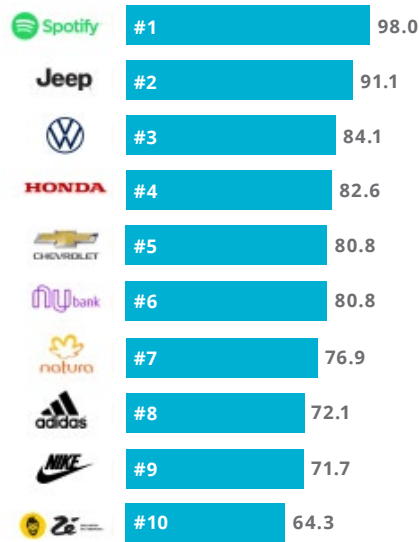



AND THE WINNERS ARE...

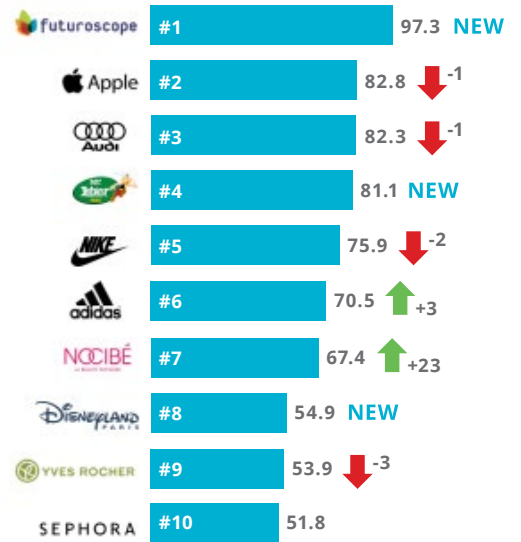
TOP 10 BRANDS PER COUNTRY




 **IN ARGENTINA**, It's no surprise that beauty and skincare top the list (Natura and Dermaglós). Audio streaming service Spotify also rates high and e-wallet Mercado Pago lands the number 10 rung.



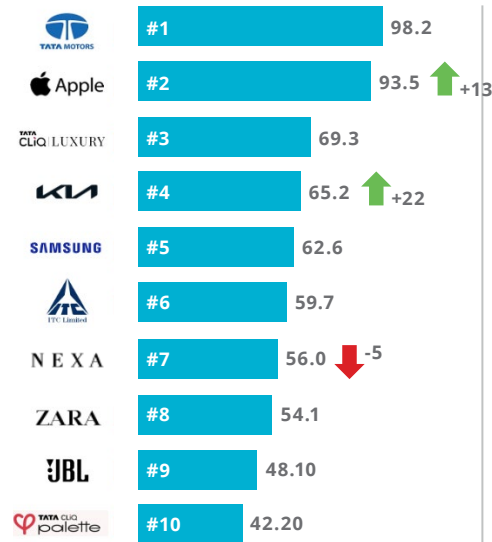
 **IN BRAZIL**, four of the top five brands are automotive but Spotify outranked every brand in the country, outshining banking, beauty, apparel, and beverage delivery phenom, Zé.



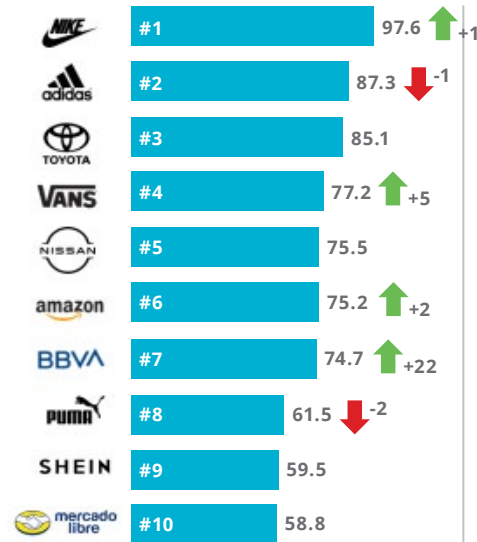
 **IN FRANCE**, three companies broke into the top ten for the first time (Futuroscope, Disneyland Paris and Parc Asterix) and Apple and Audi both dropped a point. Beauty companies took four of the top ten spots.

AND THE WINNERS ARE (CONT'D)

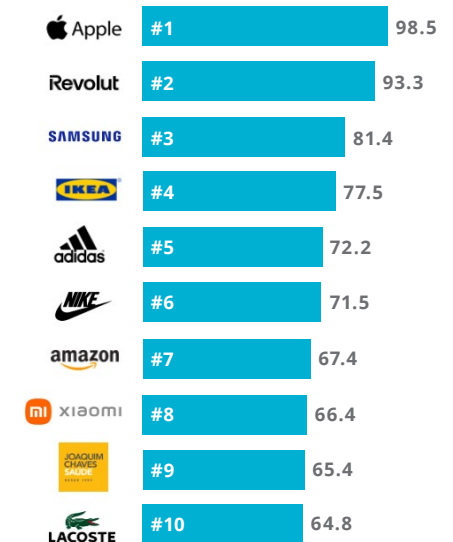
TOP 10 BRANDS PER COUNTRY



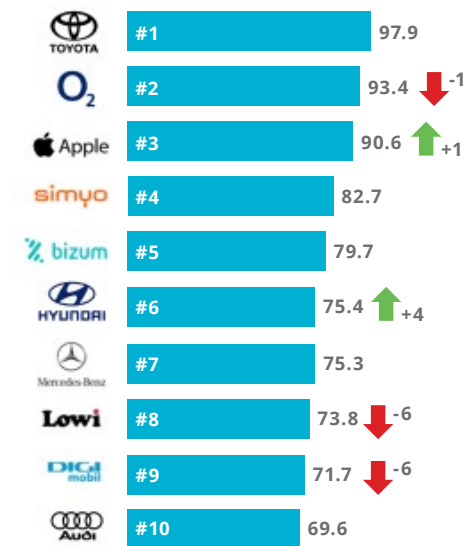
IN INDIA, Tata Motors is number one, and its pure player offerings Clia Luxury and Clia Palette also land in the top ten. Apple and Kia climbed higher, and Samsung placed in the top five.



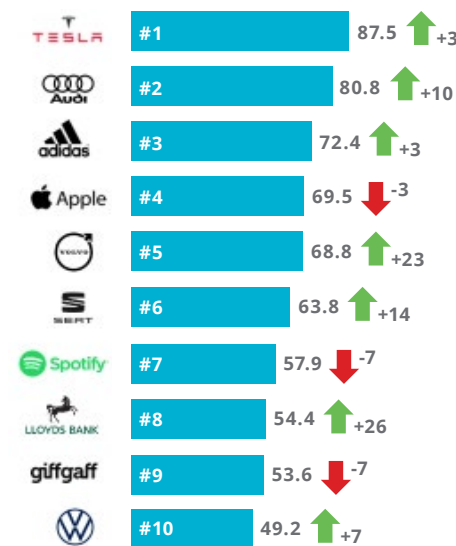
IN MEXICO, sports and apparel brands, led by Adidas and Nike, dominated the list. Also scoring high marks are automakers Toyota and Nissan, and California-based skateboarding apparel brand, Vans.



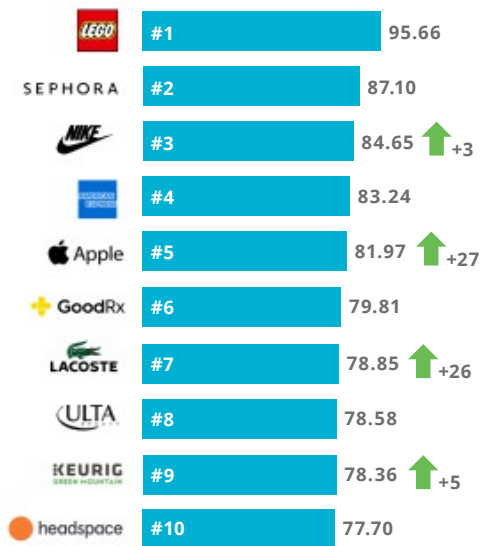
IN PORTUGAL, a mixed bag of tech (Apple, Samsung and Xiaomi), banking (Revolut), sports apparel, home goods (IKEA) and Amazon made the list. Homegrown healthcare brand, Joaquim Chaves Saúde, made the cut again.



IN SPAIN, automotive (Toyota, Hyundai, Mercedes, Audi) and mobile telecoms (O2, Simyo, Lowi, Digi) nearly swept the list, taking 8 of the 10 rankings. Apple placed 2nd and pure player, Bizum, Europe's fastest-growing A2A payment app, placed 5th.



IN THE UK, automotives had a strong showing, taking up half the list, including the top two (Tesla and Audi). The remainder of the top 10 are a smorgasbord, from apparel and tech to music and banking. Telecom giffgaff was cited for the fourth straight year but dropped from fourth to ninth place.



IN THE USA, the top spot goes to LEGO, a Danish-owned corp with 3 theme parks and 171 retail stores in North America. Only two brands remained from 2023, Sephora, taking 2nd place again, and Nike, bumping up to number 3. Pure player, Headspace, a meditation app, slid in at #10.

WINNERS AND STRUGGLERS ACROSS COUNTRIES AND CATEGORIES

No matter the country, some categories score high due to a strong halo effect.



BEST PERFORMING CATEGORIES ACROSS COUNTRIES



Others categories face the consistent challenge of receiving lower ratings.



LEAST PERFORMING CATEGORIES ACROSS COUNTRIES



Energy
Argentina



HOWEVER, IT IS POSSIBLE TO STAND OUT IN A CHALLENGING SECTOR

The **Shell Box app** simplifies payments and protects users' data privacy.

"I'M ALWAYS PLEASANTLY SURPRISED BY WHAT THIS BRAND HAS TO OFFER."



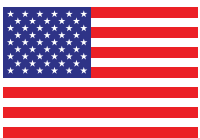
The Shell Box app was created to offer the best consumer experience possible at Shell stations across Argentina and Brazil. Customers can pay for gas and groceries using their cell phone, which earns them points and "Shell Smiles" that can be exchanged for experiences and exclusive products. Shell's "Humanology" approach uses technology to enhance the CX journey.

"THE BRAND RESPECTS MY PRIVACY AND MY PERSONAL DATA."



While the app tracks and shares data (including location, personal info, photos, and app activity), customers can request that their data be deleted. Having enhanced security features also helps put their minds at ease.

Services
USA



BY FOCUSING ON AN IMPORTANT DIMENSION, BRANDS CAN STAND OUT

Being centered on customers' needs is one of the most important items in the USA and **Happy Returns** is Best-in-Class.

"THE BRAND IS FOCUSED ON MY NEEDS AS A CUSTOMER."



Happy Returns does one thing and they do it right. In their words, they make returns "beautiful for shoppers, merchants, and the planet." No more printing labels, finding a box and buying shipping tape. "Happy Return Bars" do it all, and customers receive their refund in under a minute. With easy-to-use software and reverse logistics, retailers are also happy, as they have greater control and visibility throughout the journey of the return.



Telecom
Spain



OFFERS AND DEALS SPEAK LOUDLY

Low-cost telecom brands benefit from better CX because of their adaptability, lower costs, and the surprising nature of their offers.

Low Cost	Avg. Satisfaction	Traditional	Avg. Satisfaction
O2	8.26	JAZZTEL	7.26
SIMYO	8.10	YOIGO	6.95
LOWI	8.00	MÁSMÓVIL	6.94
DIGI / DIGIMOBIL	7.98	MOVISTAR	6.85
		ORANGE	6.71
		VODAFONE	6.48



O₂ Launched in 2018 and owned by Telefónica, Spain's fifth largest company, **O₂ España** outscored all other low cost telecom brands in the country by a respectable margin. With over 400 competitors, O₂ keeps customers and lures new ones by costing half as much as premium brands and offering bundle pricing that's hard to resist.



Simyo, owned by telecom giant Orange España, placed 2nd in this year's survey. Its 11 million customers have the power to manage most every aspect of their plan. Simyo's strategy of great rates plus a high quality network continues to dominate much of the competition.

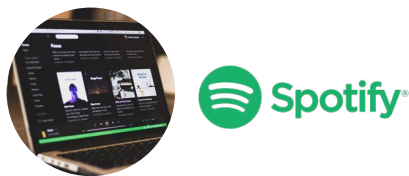


Lowi is known for its low-cost plans and special deals including enjoying a free year of Amazon Prime with their rate. With steep competition, telecom companies rely on intelligent marketing to capture consumers' attention—and market share.

BEST IN CLASS BRANDS ACROSS COUNTRIES

Average satisfaction of brands tested in at least 4 countries:

People love **Volkswagen**. Known for lasting vehicles that are fun to drive, this consumer-centric company sold 9.24 million cars in 2023, second only behind Toyota. But VW is #1 in satisfaction because they invest in innovation and listen to their customers. One such example is Volkswagen Argentina, where they just launched a 100% online sales process using WhatsApp and Salesforce to provide a seamless and dynamic customer experience.



LEARNINGS FROM OUR RESEARCH

A NEW EQUATION IS DRIVING VALUE FOR CX

EFFICIENCY + PLEASURE + GOING BEYOND

After surveying 55,000 people across 9 different countries, and having them rate 23 factors regarding their own customer experience, our research revealed something most interesting. For the **first time**, one factor was equally ranked—and was the most represented—among all markets and models, including bricks and clicks (B&C) and pure players (PP). That factor is, “*This brand often goes beyond my expectations.*”

Regardless of race, gender, age, location or culture, consumers expect brands to go the extra mile. Especially today, consumers *need brands* that are willing to do more than asked, give more than expected, and go further to impress them at every touchpoint. Great Expectations isn’t just a classic novel, it’s a novel idea that will reward brands who step up.

#1 It all starts with efficiency

“**I’m not wasting time, it’s efficient**” is one of the most represented items among all countries and models. Consumers are steadfast and transparent on what they expect: they first want to experience a journey that’s seamless and efficient. This has become table stakes for brands, and if you can’t perform on this item, you’ll instantly be dismissed.

“I’M NOT WASTING TIME, IT’S EFFICIENT”

		Bricks & Clicks	Pure Players
	ARGENTINA	6/10	3/8
	BRAZIL	4/10	3/10
	FRANCE	2/10	3/10
	INDIA	—	—
	MEXICO	5/10	4/7
	PORTUGAL	3/10	3/10
	SPAIN	1/10	2/10
	UK	1/10	1/10
	USA	3/10 ↑	1/9 ↑

BEST PERFORMING BRANDS		Bricks & Clicks	Pure Players
	ARGENTINA		
	BRAZIL		
	FRANCE		
	INDIA		
	MEXICO		
	PORTUGAL		
	SPAIN		
	UK		
	USA		

"I'M NOT WASTING TIME, IT'S EFFICIENT"

#1

Bricks & Clicks



Apple is all about making customers happy—and one way to do that is by making products that are ridiculously user-friendly. With intuitive interfaces and a support team akin to superheroes (aka Geniuses), their CX is hard to beat. Recently, the Apple Watch became even more efficient with gesture control features, just in case your other hand is too busy (holding coffee, for instance) to tap the watchface. Genius, indeed.



UK



PORTUGAL



INDIA



#1

Pure Players



zepto



INDIA

Some compare **Zepto** to a unicorn. Or a rocket. This quick-commerce app lets customers order groceries and have them delivered to their door in ten minutes. With over 10 million downloads on the Google Play Store, Zepto 'bags' the top spot in India for a fast, convenient, and efficient CX journey. It also earns top market share with \$1.2 billion in sales in 29 months.



"IT'S EASY TO FIND WHAT I'M LOOKING FOR"

#1

Pure Players



Amazon has a new feature that makes it easier than ever to find what you're looking for—and perhaps, what you're not. If an item is frequently returned, Amazon includes a warning beneath the product's description, "Frequently returned item." Users can still choose to purchase the item, but the warning encourages the user to check product details and read customer reviews.



FRANCE



MEXICO





“THE BRAND IS CENTERED ON MY NEEDS AS A CUSTOMER”

#1
Pure Players

simyo

SPAIN

Simyo scores high for being centering on its customers’ needs by allowing them to easily share gigabytes from their plan to family members, friends, or anyone—as long as they’re a Simyo customer. Simyo puts the customer in control, increasing customer satisfaction on both ends of the spectrum—of those who give gigs and those who receive.



“THE BRAND ALWAYS ANSWERS MY REQUESTS PROMPTLY”

#1
Pure Players

Fidelity
INVESTMENTS

USA

Fidelity customers can reach out to their Customer Service team in a variety of ways, including through social media. With 93% of Americans being active online, these offerings are smart and contribute to why Fidelity is rated best at quickly answering requests in the USA. So whether customers use Reddit, Instagram, Facebook, X, Discord or YouTube, they can log on, ask questions, and have them answered on the platform they prefer.





#2 Then add a dose of pleasure

Surprises and unexpected touches add pleasure to the customer journey. One way to accomplish this is by using technology to deliver an innovative experience. Being able to emotionally satisfy customers provides instant gratification and longtime loyalty.

“THE INSTORE / ONLINE EXPERIENCE WITH THIS BRAND IS ENJOYABLE AND ENGAGING”

#1
Bricks & Clicks




MEXICO

With vibrant, interactive in-store events that rack up millions of views on Tic Tok, and partnerships with global brands like Scuderia Ferrari and the country’s favorite fútbol players, **PUMA Mexico** runs easily into first place for their enjoyable CX experience. The fondness that sneakerheads and athletes have for these iconic shoes and apparel only adds to their winning edge.



#1
Bricks & Clicks




PORTUGAL

Lacoste has taken a deep dive into the digital realm by creating an upgrade to its Digital Pass, the UNDW3 Card (pronounced “underwater”). The Card is a dynamic NFT that provides access to the brand’s Web3 platform, where users can join creative contests and challenges, learning Lacoste’s history along the way. Participants earn personal rewards but the entire Crocodile community can reap benefits as well.





#3 But the best of the brands go the extra mile

Consumers in every market want brands that go above and beyond. Brands that adapt to this "culture of the extra mile" will be the real winners.

"THIS BRAND OFTEN GOES BEYOND MY EXPECTATIONS"

		Bricks & Clicks	Pure Players
	ARGENTINA	1/10	1/8
	BRAZIL	1/10	2/10
	FRANCE	5/10	8/10
	INDIA	6/10 	1/10 
	MEXICO	1/10	1/7 
	PORTUGAL	4/10 NEW	4/10
	SPAIN	2/10 NEW	4/10 NEW
	UK	3/10	4/10
	USA	1/10	5/9

#1

Bricks & Clicks



USA

LEGOs are not just kids' toys. Adult fans of LEGO (AFOL) are a growing group, so when LEGO research showed 1 in 3 adults worldwide are stressed, with 98% agreeing music helps them relax, LEGO created Rhythm & Bricks, a new lo-fi genre where the iconic sounds of LEGO bricks are blended with instrumentals. The brand also introduced "LEGO Lates," after-hours, adults-only events at their retail stores, and their new campaign "Find Your Flow" focuses on the mental wellbeing of adults.

#1

Bricks & Clicks



FRANCE

With a reputation for reliability, German luxury brand, **Audi**, lands the number one rung in France for exceeding expectations. Launching more than 20 new models in '24 and '25, including electric, combustion, and plug-in hybrids, buyers have faith that an Audi isn't just a purchase, it's an investment.



3 WAYS FOR BRAND TO GO BEYOND EXPECTATIONS

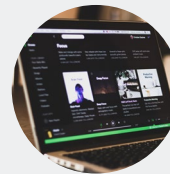
#1 Be more surprising

Never underestimate the transformative power of surprise. The entire CX journey gets an unexpected jolt of satisfaction and love for your brand can blossom.

"I'M ALWAYS PLEASANTLY SURPRISED BY WHAT THIS BRAND HAS TO OFFER"

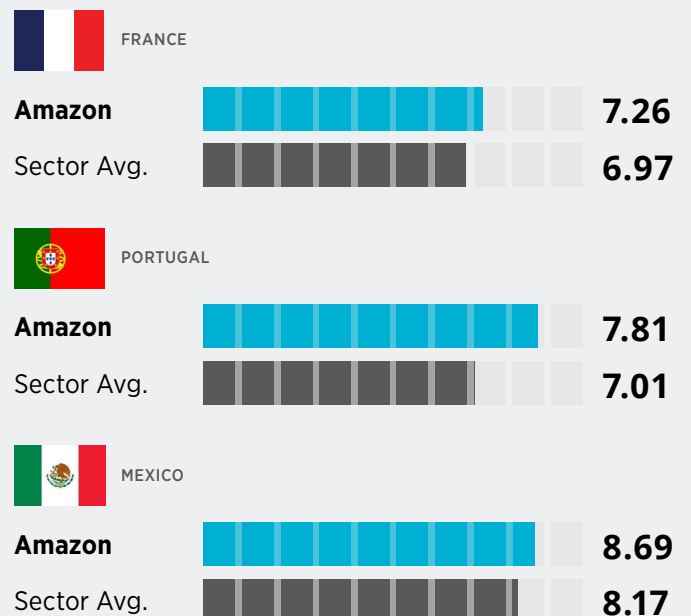
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	PORTUGAL	9/10 NEW	5/10
	SPAIN	8/10	5/10 NEW
	UK	6/10	9/10
	USA	10/10	7/9

#1
Pure
Players



amazon

Amazon customers recently received a surprise-and-delight moment upon discovering a new feature "Consult-a-Friend." Shoppers can send a link to friends asking for their opinion on a product. Friends can then reply with emojis and commentary.






#2 Be more **innovative**

Innovation not only differentiates brands from competitors, it also creates customer satisfaction through personalization. If your brand doesn't innovate and stimulate its customers, they will find a brand that does.

"THE BRAND USES TECHNOLOGY TO DELIVER AN INNOVATIVE EXPERIENCE"

#1
Pure
Players

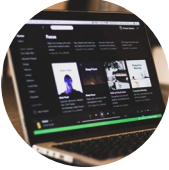




 USA

Headspace wants you to take the time to take care of yourself, and the most innovative way to do that is with Headspace XR: a virtual playground for your mind. Although it's labeled XR (extended reality), it provides real world benefits that can be felt immediately. Users can play mood-boosting games in colorful landscapes or relax with guided meditations.



#1
Pure
Players



 UK

Spotify's new AI Playlist might be music to your ears. AI Playlist generates a curated track list based on text descriptions entered, such as "Make me feel like a vampire hunter from Blade." As with any AI, the better the prompts, the better the results. Users can enter genres, moods, animals, activities, colors, and even emojis.



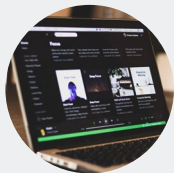


#3 Make data more **rewarding**

Consumers know how valuable their data is, so in exchange for giving it up, they want to be incentivized. The more they give, the more they expect. Tiered loyalty programs that are hyper-personalized are on the rise.

“THIS BRAND PROVIDES GREAT VALUE WHEN I PROVIDE MY DATA”

#1
Pure
Players



BRAZIL

NuBank empowers people daily by reinventing financial services and letting them manage their money with freedom. But it's a newer feature that's garnered attention: personal recommendations. When customers open the app, they'll find suggestions relevant to their current financial situation. Nubank boasts over 100 million customers, making them the first western neobank to ever do so.



GOING BEYOND:

THE KEY TO KEEP THEM COMING BACK

Functional efficiency remains the foundation and is the first step of the contract brands have to deliver. When looking at the most discriminating items across all countries, and all models, 4 are regarding functional efficiency: *“I’m not wasting time, it’s efficient,” “it’s easy to find what I’m looking for,” “the brand is centered on my needs as a customer,”* and *“the brand always answers my requests promptly.”* The highest performing brands are those that streamline the customer journey, ensuring time is not wasted and responses to inquiries are swift. However, functionality alone is not enough.

Adding pleasure and emotional value to the customer experience is also critical - and can be achieved by making the shopping experience more entertaining and engaging. Brands can take successful cues from Adidas in the UK and Puma in Mexico, which rank highest in delivering enjoyable experiences, both in-store and online.

Yet, to truly differentiate and lead in the CX domain, companies must strive to go beyond what is expected. When evaluating the most discriminating brand traits that consumers seek, the item *“this brand often goes beyond my expectations”* was selected number one, across all countries, languages, and models.

For more information or to deep-dive into a specific brand, category, or market, please contact:

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