



CLEAR

# EXPERIENCE GAP

A new currency for brand growth

@clear\_global / #experiencegap



THE RULES OF  
ENGAGEMENT HAVE  
CHANGED.

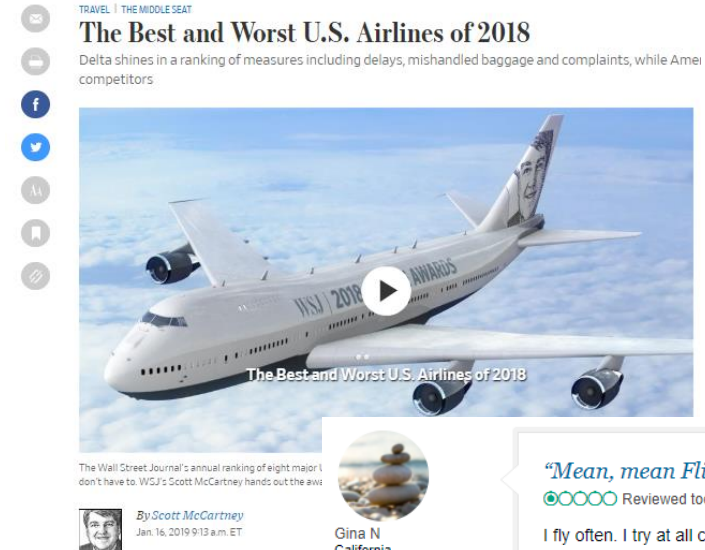
CONSUMERS HAVE  
**HIGHER EXPECTATIONS**  
THAN EVER BEFORE.



# EXPERIENCE IS EVERYWHERE

Transfarency<sup>SM</sup>  
[Trans-fair-uhn-see] n.

1. Philosophy created by Southwest Airlines in which Customers are treated honestly and fairly, and low fares actually stay low.



Gina N  
California  
Level 4 Contributor  
25 reviews  
8 helpful votes

**"Mean, mean Flight Attendant"**

Reviewed today

I fly often. I try at all cost to avoid your airline. Your flight attendants are awful. On February 25th on the above mentioned flight I witnessed the most absurd behavior from one of your FA's Amy. Firing off at the mouth whenever possible. Snapping and correcting passengers as if she were a kindergarten teacher. Lord Amy find another job...

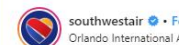
Date of travel: February 2019

More

Domestic Economy San Diego - San Francisco

Helpful? 1 Thank Gina N

Report



southwestair Just a couple L (photo: @val\_dickson\_)

Load more comments

dallasfortworthaviation @a day late 2019 into 2020

dallasfortworthaviation @a ashleyayn6 @dallasfortworth

hmmmm interesting bc from they were supposed to already be trying to Hawaii and the government shut down

simply delayed them on their

8,527 likes

FEBRUARY 11

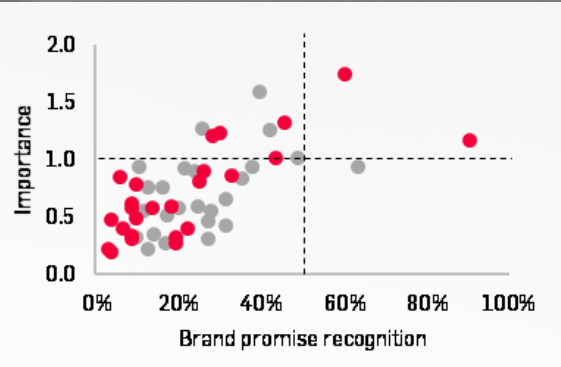
Log in to like or comment.



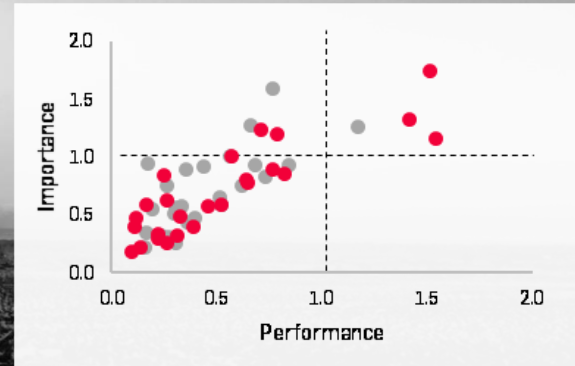


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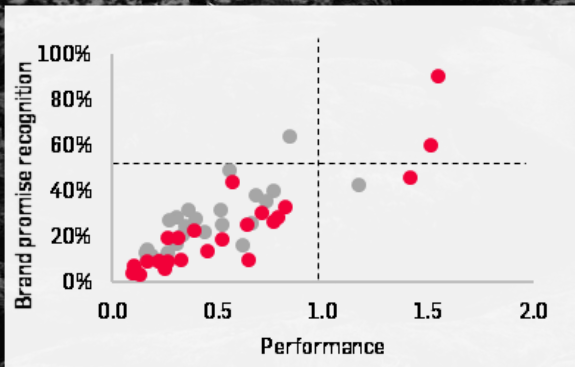
FOR BRAND GROWTH,  
**THE BRAND MESSAGE  
AND EXPERIENCE** ARE  
NOW EQUALLY  
IMPORTANT



Are you communicating what matters?



Are you delivering what matters?



Does your experience match your promise?

**MAXIMISING  
THE RELATIONSHIP  
BETWEEN YOUR  
MESSAGE AND YOUR  
EXPERIENCE CAN  
DELIVER UNTAPPED  
COMPETITIVE  
ADVANTAGE**

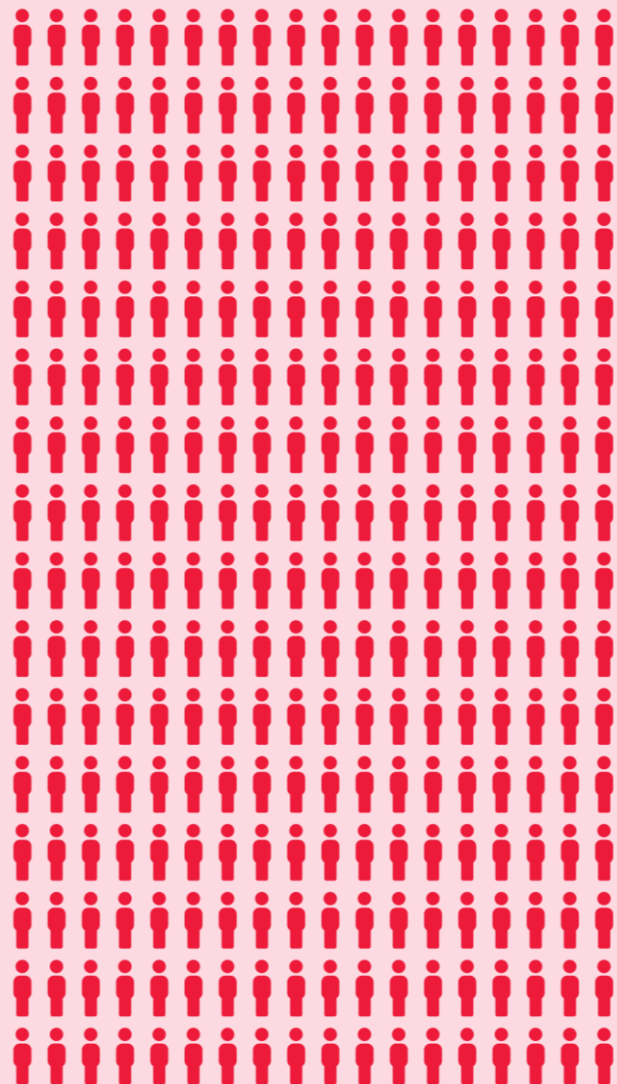


## To size the gap, we measured...

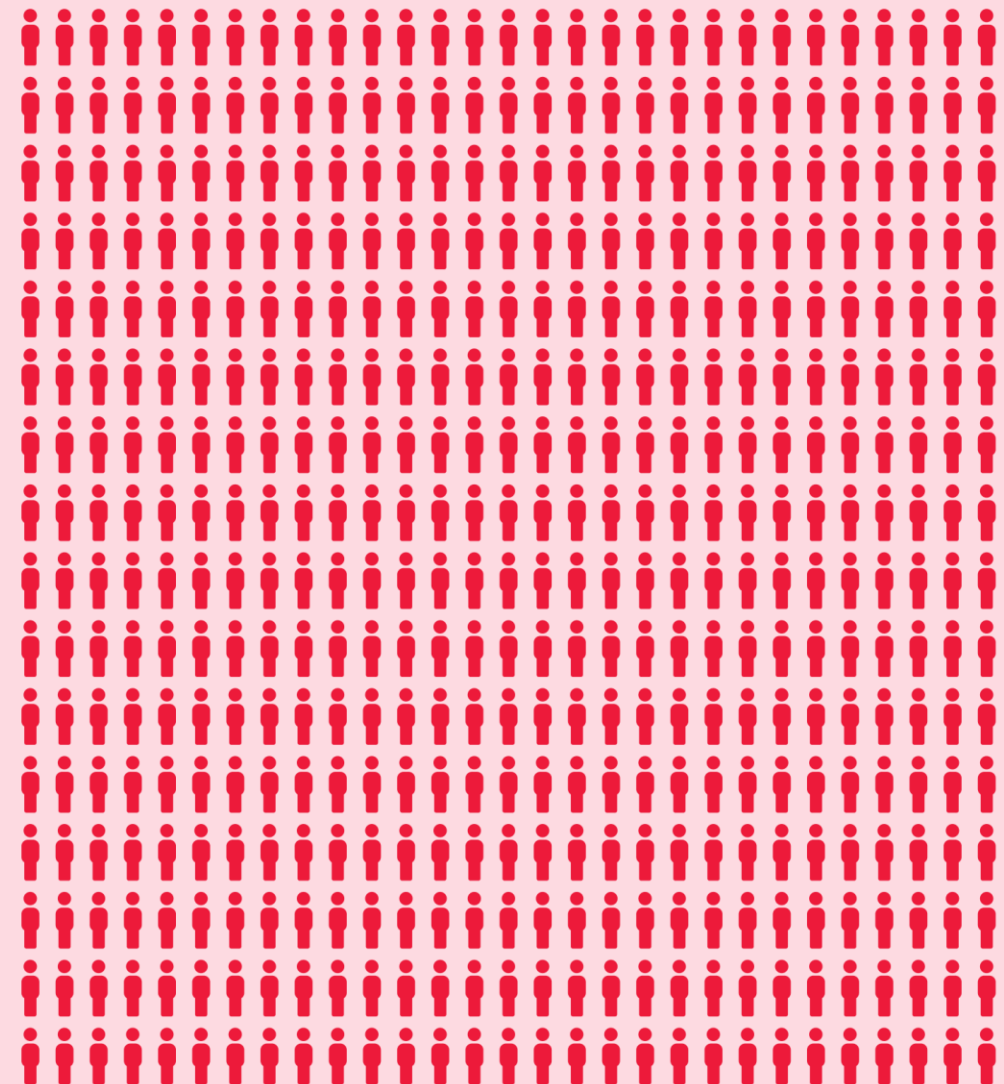
Whether consumers believe that the experience delivers on marketing promises

Whether brands are working hard enough to align the two

Whether brands are consistent in delivering the experience across an array of touchpoints



34,000  
CONSUMERS



of America. Spotify The New York Times ASDA Google

HONDA abc Bild BBC LIDL CHASE

招商銀行 VAUXHALL LinkedIn USA TODAY Deutsche Bank

BER itv Waitrose 5 Microsoft E EDEKA Apple

merican Airlines BW Best Western. ACCOR HOTELS AIR CHINA AIRFRANCE

Kroger Walmart Boots NETFLIX TOYOTA DELTA

CHANGAN 中国南方航空 easyJet VOLVO virgin atlantic

BRITISH AIRWAYS ALDI BARCLAYS BMW IKEA Opel

amazon Condor ABSOLUT

NISSAN CHASE ProSieben Guinness

Radisson Allianz COS

facebook TARGET NatWest

TESCO M&S DIEZEL

YouTube HUAWEI UNITED

TSB Budweiser Bitburger

airbnb citi Volkswagen

225  
BRANDS





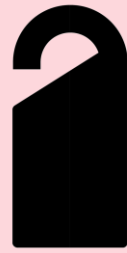
**AUTOMOTIVE**



**AIRLINES**



**ALCOHOLIC  
DRINKS**



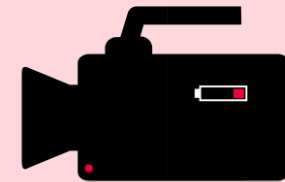
**HOTELS**



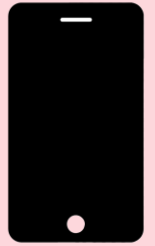
**RETAIL BANKING  
& INSURANCE**



**RETAILERS**



**MEDIA**



**DIGITAL & TECH  
PLATFORMS**

**8 CATEGORIES**



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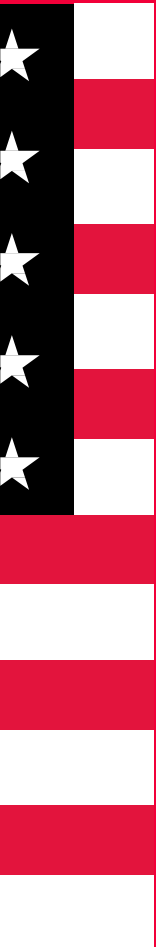


# THE RANKINGS



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## US RANKING





USA RANKING  
DETAIL

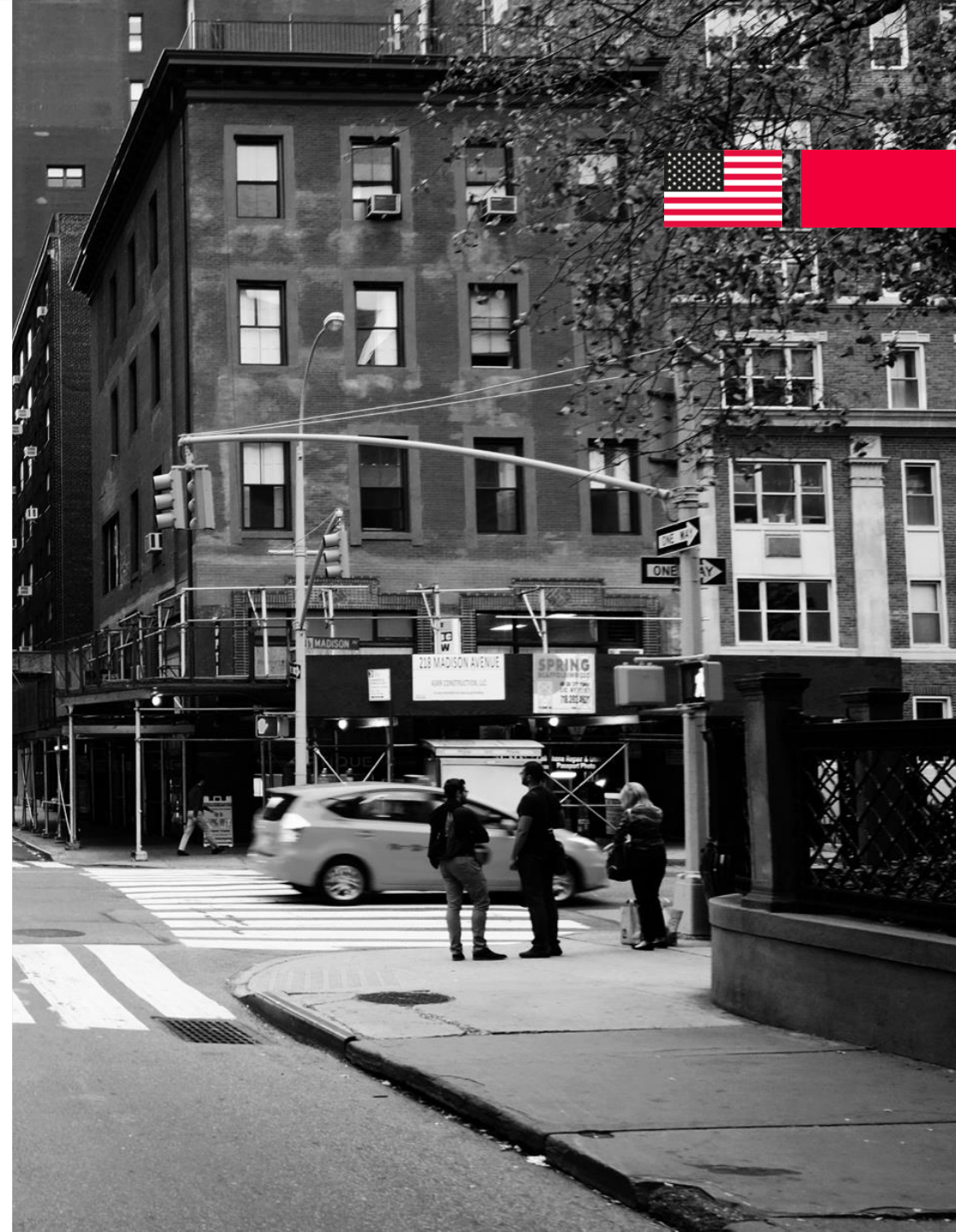
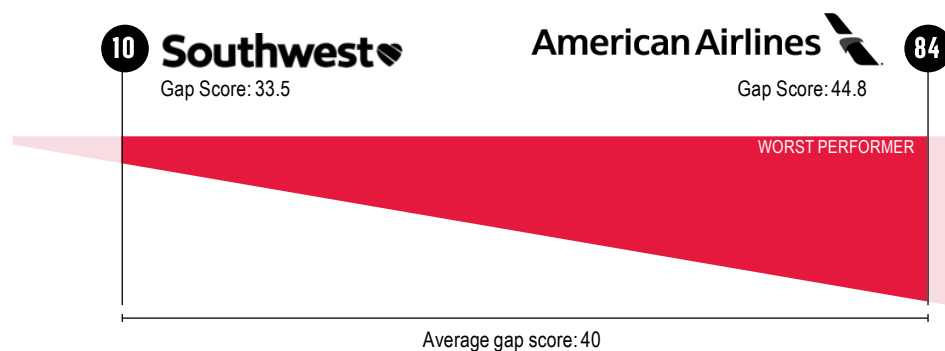
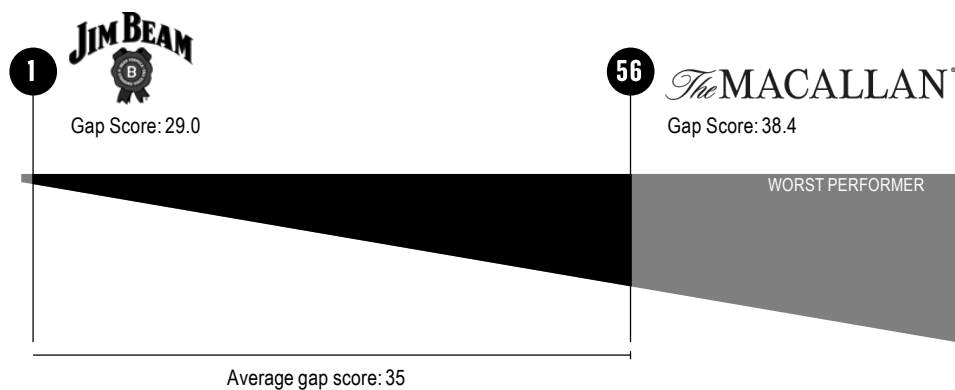
TOP

1	Jim Beam
2	Toyota
3	Absolut Vodka
4	State Farm
5	Jack Daniel's
6	Geico
7	Honda
=8	Miller
=8	Bacardi
10	Southwest

BOTTOM

77	BMW
78	Uber
79	KLM
80	Walmart
81	Comcast
82	United
83	Facebook
84	American
85	ABC
86	Huawei

# CATEGORY GAPS





# THE EXPERIENCE GAP COST

In the US, the experience gap  
costs each brand between

**\$460 - 860M**

on average in lost  
revenue every year



The background of the entire image is a collage of US one-dollar bills, showing the portrait of George Washington and the text 'THE UNITED STATES OF AMERICA' and 'ONE DOLLAR'.

# IT MIGHT COST EVEN **MORE** IN THE FUTURE

32%

Believe gap  
between promise  
and reality is  
getting bigger



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# 5 STEPS FOR CLOSING THE GAP



**1. MAKE YOUR  
PROMISES  
AUTHENTIC**



## ■ MAKE YOUR PROMISES AUTHENTIC



46%

ALMOST HALF OF  
CONSUMERS  
**NEVER** TAKE  
ANYTHING  
BRANDS SAY  
AT FACE VALUE

1/3

Say brands are making increasingly  
**unrealistic claims** about what they  
can offer

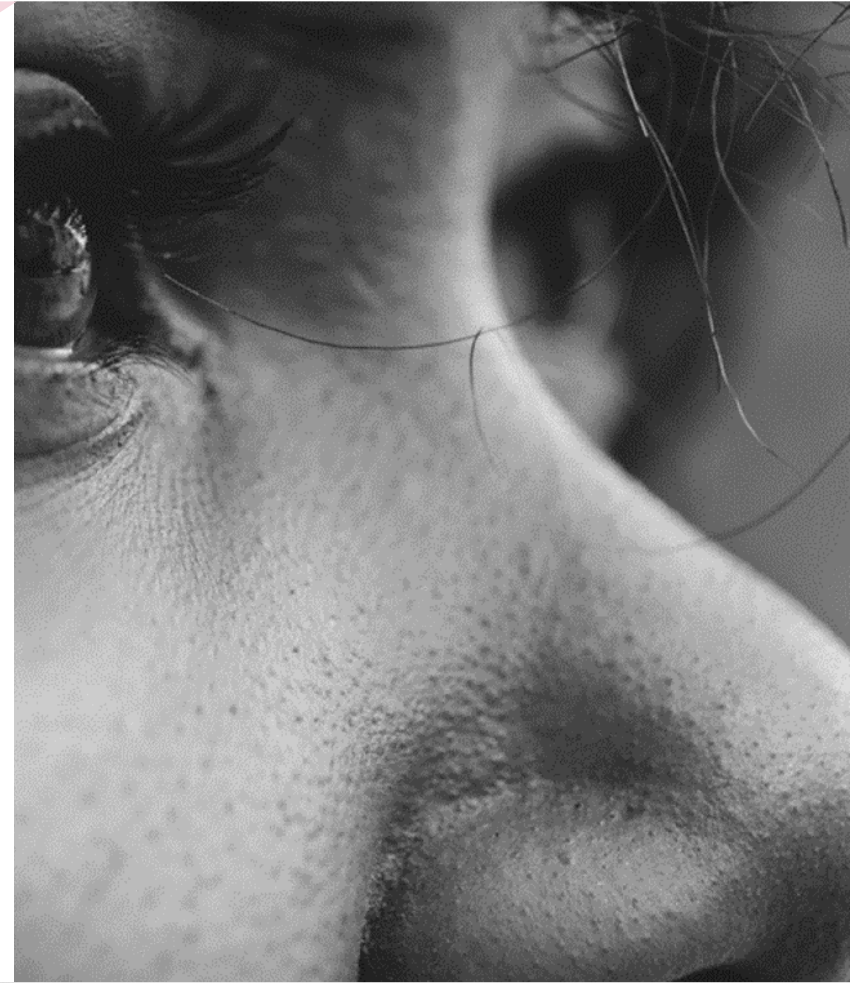
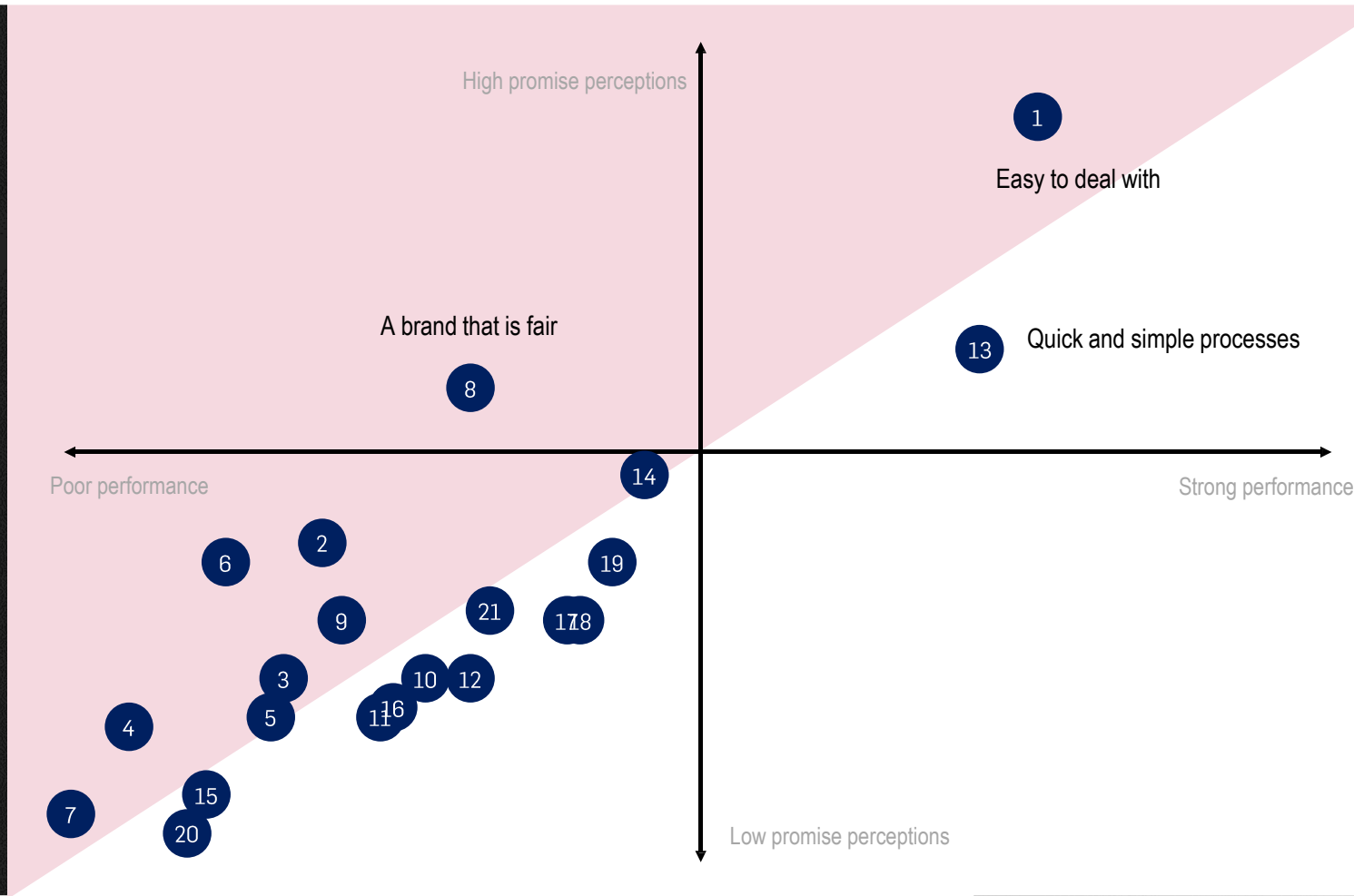
47%

Believe brands will **say almost  
anything** to get them to use their  
brands

# MAKE YOUR PROMISES AUTHENTIC

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EEICO® Ranking: #6





## 2. MAKE HUMAN CONNECTIONS COUNT



# MAKE HUMAN CONNECTIONS COUNT

Interacted with...

Someone who  
worked for the  
brand

Another  
customer

An automated  
system

No one

Average NPS score  
(-100 to 100)

+40

+24

+13

+17

% feeling positive  
emotion towards brand  
(desire, relaxation or happiness)

76%

77%

68%

64%

Net impact on switching  
(positive impact minus negative,  
scaled -2 to +2)

.7

.5

.3

.5

# MAKE HUMAN CONNECTIONS COUNT

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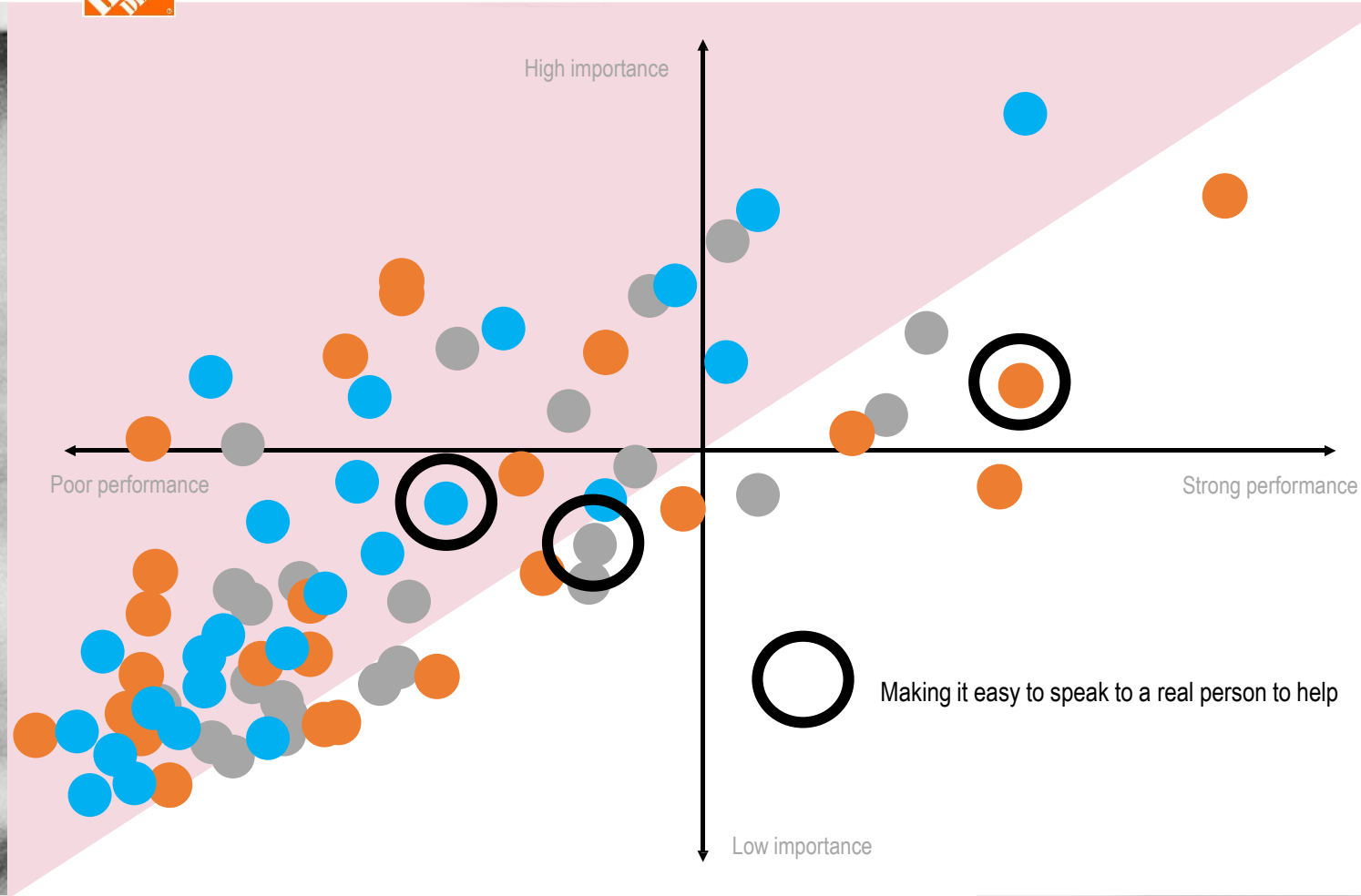


Ranking: #30

Walmart



Ranking: #80



**3. DELIVER  
THE BASICS  
BRILLIANTLY**

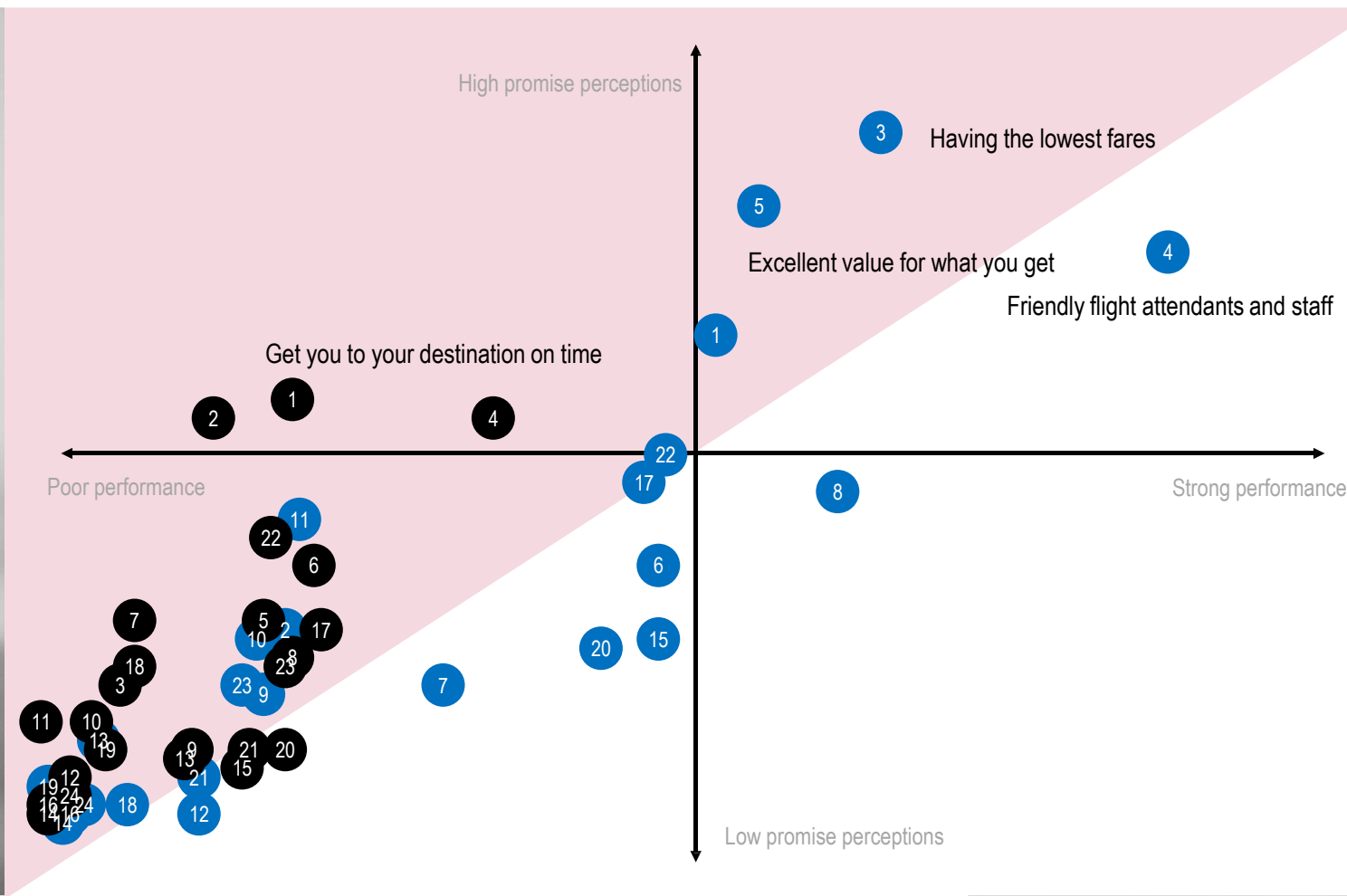




# DELIVER THE BASICS BRILLIANTLY

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Southwest Ranking: #10 UNITED Ranking: #82



**4. KNOW THE ROLE  
CUSTOMERS WANT  
YOU TO PLAY**





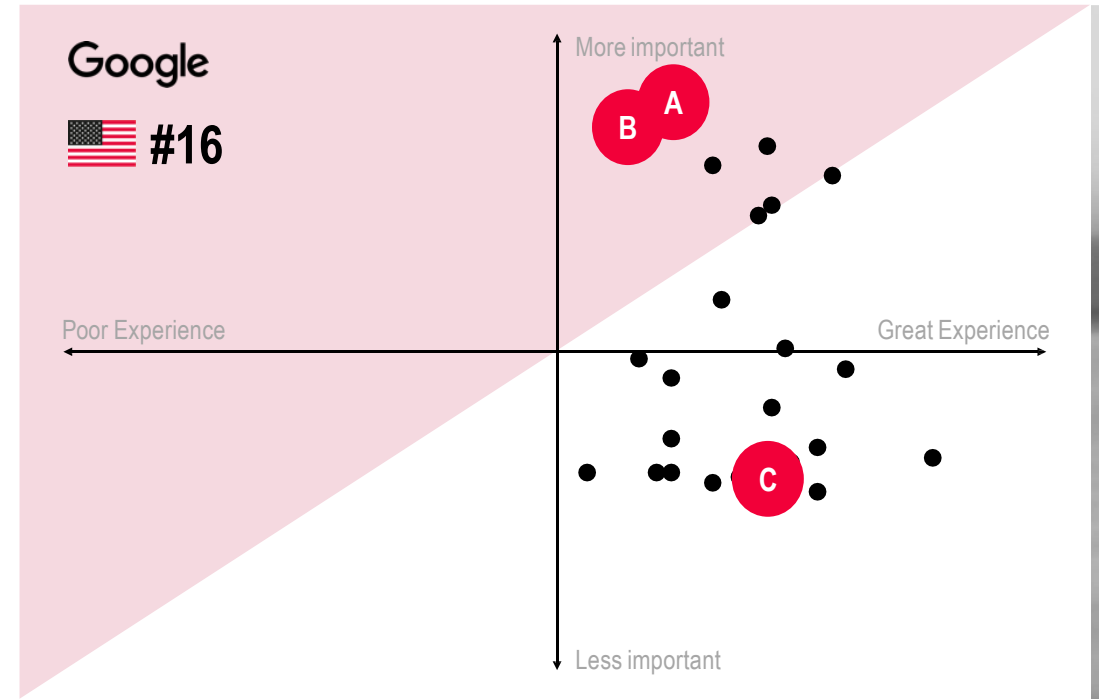
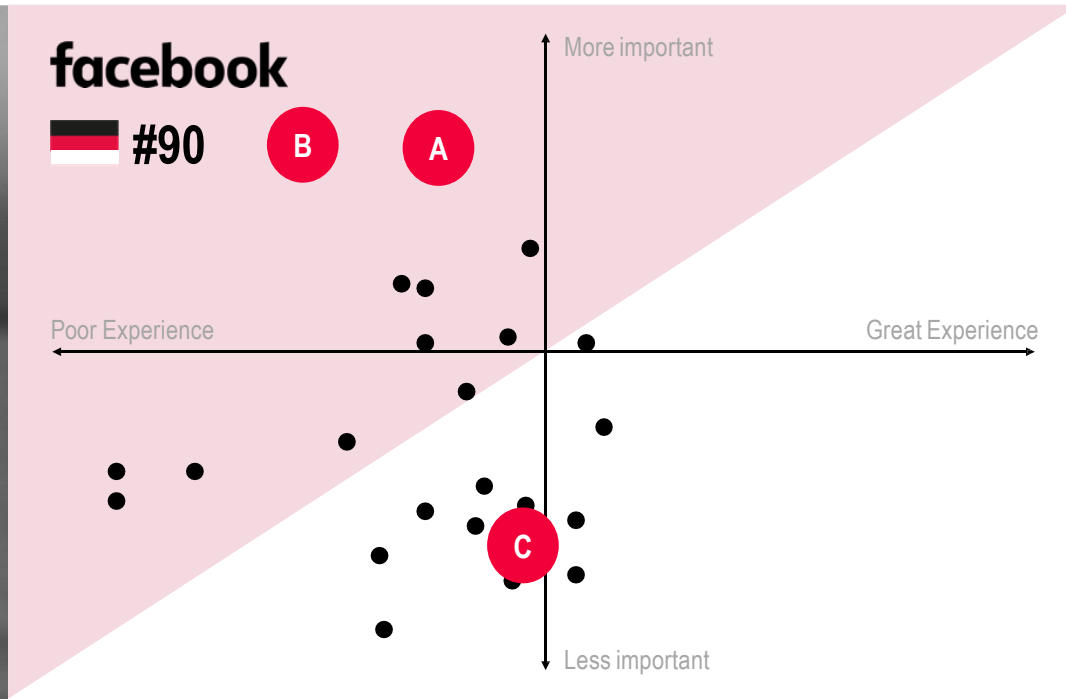
**5. DEMONSTRATE  
THAT YOU VALUE  
YOUR CUSTOMERS'  
DATA**





# DEMONSTRATE THAT YOU VALUE YOUR CUSTOMERS' DATA

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- A** Statement = they have the best security/privacy features
- B** Statement = they are responsible with users' data
- C** Statement = they provide a personalised experience

## 5 STEPS FOR CLOSING THE GAP

#1 MAKE YOUR PROMISES **AUTHENTIC**

#2 MAKE **HUMAN** CONNECTIONS COUNT


#3 DELIVER THE BASICS **BRILLIANTLY**

#4 KNOW THE ROLE CUSTOMERS WANT **YOU** TO PLAY

#5 DEMONSTRATE THAT YOU VALUE **CUSTOMER DATA**

 BRANDS THAT  
 CLOSE THE  
 EXPERIENCE  
 GAP, WIN

[www.clearstrategy.com](http://www.clearstrategy.com)



**CLEAR HELPS  
BRANDS **CLOSE** THE  
EXPERIENCE GAP  
ACROSS MULTIPLE  
SECTORS IN MARKETS  
AROUND THE WORLD.**

JIM WHELAN  
MANAGING DIRECTOR  
CLEAR M&C SAATCHI

[JIM.WHELAN@CLEARSTRATEGY.COM](mailto:JIM.WHELAN@CLEARSTRATEGY.COM)

+1 917 287 9992