# EXPERIENCE GAP

Sizing the gap between brand promise and brand experience

# CONTENTS

## WHAT IS BRAND EXPERIENCE?

**Brand experience is**...
sensations, feelings, cognitions, and behavioural responses evoked by...
a **brand's** design and identity, packaging, communications, and environments.

Journal of Marketing, Vol. 73, May 2009
J. Joško Brakus, Bernd H. Schmitt, & Lia Zarantonello

# FOREWORD

**Damian Symons, Global CEO, CLEAR**

## DISAPPOINTMENTS.

We've all had them. That moment when someone or something lets you down. When they fail to live up to expectations. When the promises they've made are exposed as untrue.

How many times has a brand done that to you in the past year?

Welcome to the Experience Gap.

A world first study into how well brands are keeping their promises, right across the customer experience – and how much each broken promise is costing them.

Today, consumers have higher expectations than ever before. The Experience Gap proves that many brands are struggling to meet them. In many cases, it shows they're failing to deliver their fundamental basic promises.

However, there are some brands that are succeeding more often than not – proving that it is possible to bridge the gap.

To help brands diagnose how to close their gaps, we've analysed the specific experience factors that make up people's expectations of individual brands – and how well (or badly) they're delivering at every point. What emerges is an experience fingerprint – a map of the specific expectations consumers have for every brand we cover.

That's why we believe this study is so important. It demonstrates that too often, businesses under invest in applying brand positioning across the experience and their employee base. But it also shows brands how to close the gap – and start keeping more of their promises.

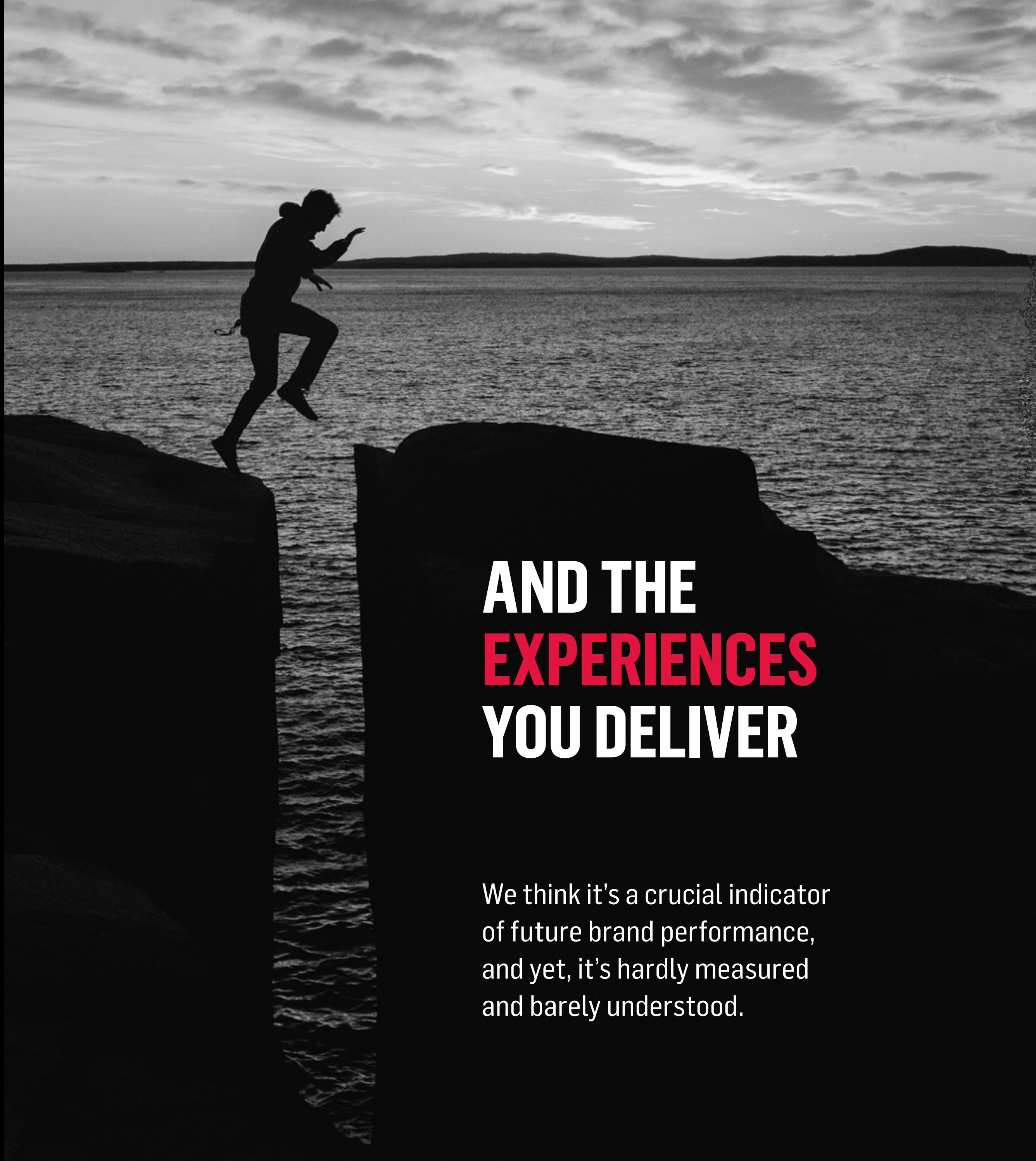
To close the gap, CLEAR has identified five things brands need to focus on:

Make human connections count – understand where to add humanity back into the experience

- Make your promises authentic – and work out how you'll deliver on them
- Deliver the basics, brilliantly – when you don't, the gap widens
- Demonstrate that you value your customers' data – by being more personal, customisable and responsible
- Anticipate shifting needs – and act fast to deliver against them

In a world where consumers' expectations have been ratcheted upwards by the always on, next day delivery, 24hr customer service culture, brand experience has become an arms race; closing the Experience Gap has just become the most effective way to win.

# THE GAP BETWEEN THE PROMISES YOU MAKE...

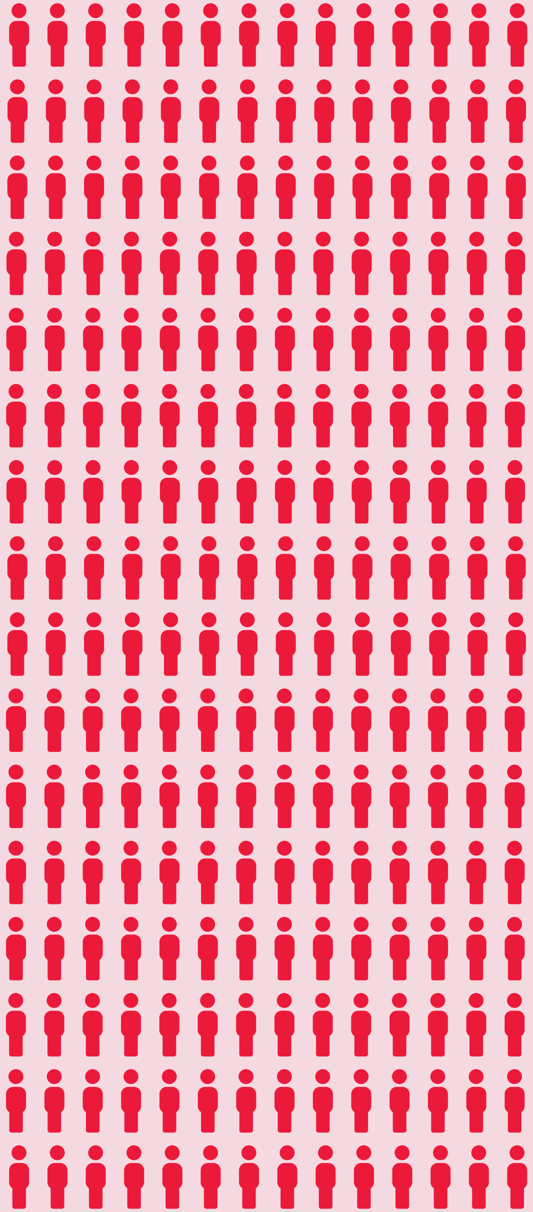


# AND THE EXPERIENCES YOU DELIVER

We think it's a crucial indicator of future brand performance, and yet, it's hardly measured and barely understood.

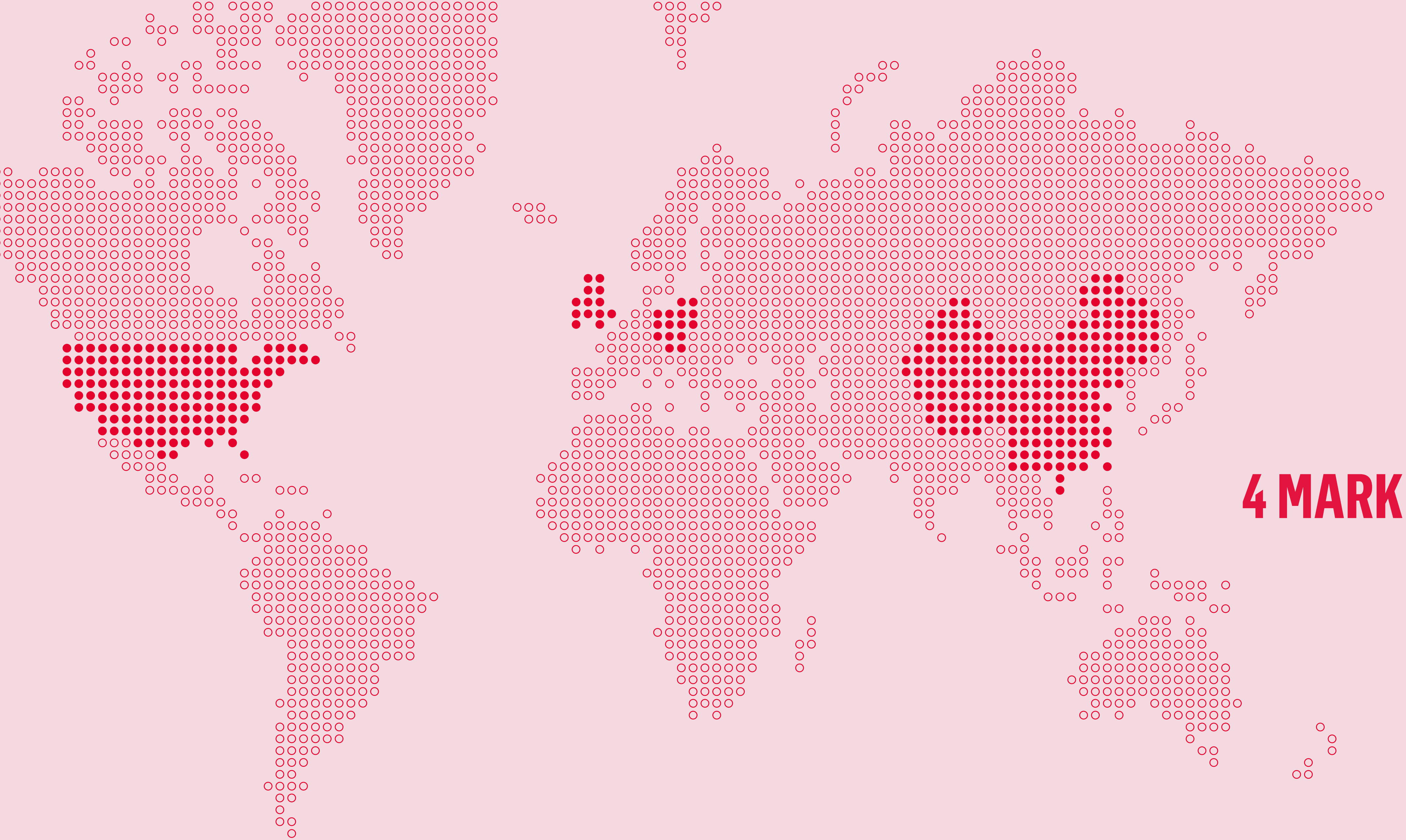

# WE'VE SIZED THE GAP BETWEEN PROMISE AND DELIVERY

With the worlds largest study on brand experience. And we've calculated how much it's costing brands in $$$, £££, €€€ and ¥¥¥



# 34,000 CONSUMERS

To size the experience gap and determine how much it is costing brands, CLEAR fielded an online survey with 34,000 respondents to gather perspectives on brand experience, brand messaging and how well different categories and brands are meeting consumer expectations.



# 4 MARKETS

Between July and September 2018, CLEAR used an online survey to poll 34,040 consumers in 4 countries:

United Kingdom: 8,817

United States: 9,151

Germany: 8,921

China: 7,151

AUTOMOTIVE | AIRLINES | ALCOHOLIC DRINKS | HOTELS | RETAIL BANKING & INSURANCE | RETAILERS | MEDIA | DIGITAL & TECH PLATFORMS

# 8 CATEGORIES

We selected eight categories that represented different types of brand experience – fast, cheap, slow, expensive, frequent, rare, emotional, functional.

During the study, respondents collectively rated a total of 225 brands. The brands were selected as a representative set that respondents would be most likely to know and/or use in each country.

# 225 BRANDS

# ANSWERING 5 QUESTIONS

Respondents in the study had to have interacted with the brands they were asked about in the last 12 months – and we asked them to focus on memorable experiences when answering.

Survey topics included:

- Last memorable experience with the brand
- What the brand is trying to stand for and which of those elements is most important
- Must-have and Stand-out attributes within the category
- Method and reason for interaction
- How well the brand performed on category attributes
- General and brand specific attitudes

**HOW MUCH**
is it costing brands?

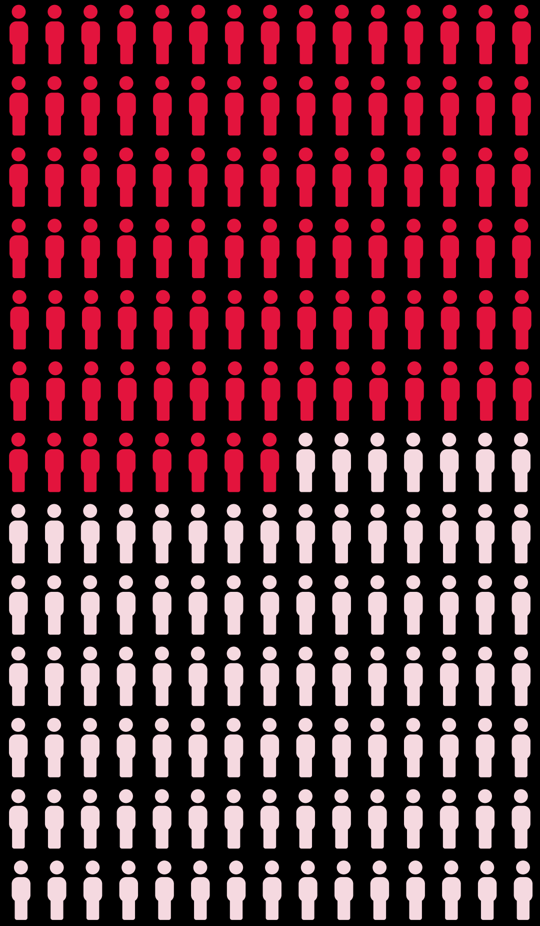
**WHICH CATEGORIES**
have a particular problem?

**WHICH AREAS**
of your experience matter most?

Do we prefer
**HUMAN OR DIGITAL**
experiences?

**WHO**
in your business should own 'experience' anyway?

## HEADLINES
### WE KNOW IT EXISTS



# 52%

## OVER HALF OF CONSUMERS NEVER TAKE ANYTHING BRANDS SAY AT FACE VALUE

# 32%

Say that the gap between the promises and the actual experience is getting bigger

# 27%

Almost one-third of consumers Believe experiences with brands have got worse, not better over time

## AND WE KNOW IT'S IMPORTANT

# 18%

1/5 have stopped using a brand in the last 12 months because of broken promises

# 62%

would switch brands if they believed they'd get a better experience

# SIZING THE GAP

## 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

# UNITED KINGDOM

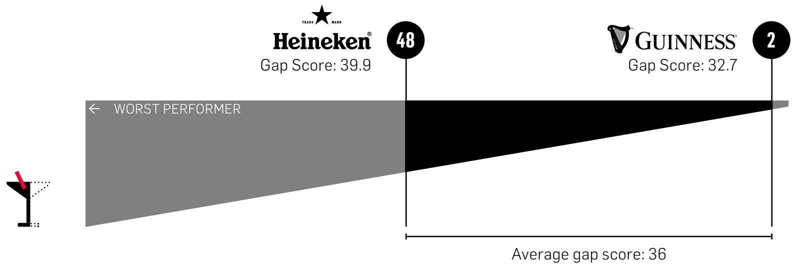
British consumers have strong opinions on the Experience Gap.

¾ of them believe brands don't care about them as an individual.

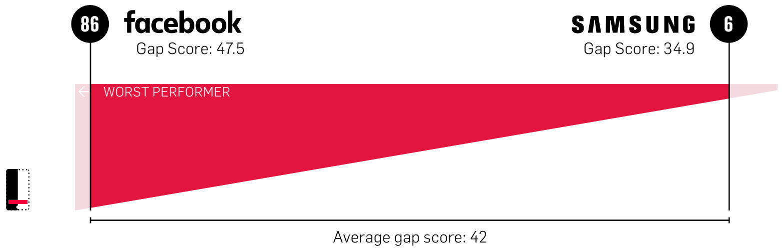
In every category, they highlight brands that delight and brands that fall well short – proving that big or small, bank or airline – brands have no excuse.

First Direct proves this – delivering a slick digital experience and warm human interactions – whilst also being a bank.

The BBC, like many media brands in the study, struggles to match the expectations of its audience – with UK consumers highlighting its failure to provide a variety of perspectives as a key concern.




In the UK, the Alcoholic drinks category has the lowest average gap score, with Guinness doing a brilliant job of delivering an experience that is consistent with its promise to be a beer 'made of more'.




In the tech category, Samsung delivers where Facebook does not on the twin promises of data security and personal privacy.


**IN THE UK, THE EXPERIENCE GAP COSTS EACH BRAND BETWEEN £220M AND £390M ON AVERAGE IN LOST REVENUE EVERY YEAR**

# £220 - 390M

# UK RANKING


| # | BRAND | GAP SCORE |
|---|---|---|
| 1 | First Direct | 32.4 |
| 2 | Guinness | 32.7 |
| 3 | Premier Inn | 33.5 |
| 4 | Gordons | 34.2 |
| 5 | The Macallan | 34.8 |
| 6 | Samsung | 34.9 |
| 7 | Nationwide | 35.1 |
| 8 | Intercontinental | 35.2 |
| 9 | Jet2 | 35.4 |
| 9 | Aldi | 35.4 |
| 11 | Bombay Sapphire | 35.5 |
| 12 | Marriott | 35.8 |
| 13 | The Famous Grouse | 35.9 |
| 13 | Johnnie Walker | 35.9 |
| 15 | Virgin Atlantic | 35.9 |
| 16 | Emirates | 36.0 |
| 17 | Amazon | 36.1 |
| 17 | Ford | 36.1 |
| 19 | Toyota | 36.6 |
| 20 | Absolut Vodka | 36.7 |
| 21 | Mercedes-Benz | 37.0 |
| 22 | Four Seasons | 37.1 |
| 23 | Peroni | 37.2 |
| 24 | Bacardi (rum) | 37.3 |
| 25 | IKEA | 37.4 |
| 26 | LV= | 37.5 |
| 26 | Novotel | 37.5 |
| 28 | Direct Line | 37.6 |
| 29 | Netflix | 38.1 |
| 30 | Holiday Inn | 38.2 |
| 30 | Mercure | 38.2 |
| 32 | Audi | 38.4 |
| 32 | John Lewis | 38.4 |
| 32 | NatWest | 38.4 |
| 35 | Waitrose | 38.6 |
| 35 | Lufthansa | 38.6 |
| 37 | Yorkshire Bank | 38.7 |
| 38 | Boots | 38.8 |
| 38 | Marks & Spencer | 38.8 |
| 40 | Norwegian | 39.0 |
| 41 | Hyundai | 39.3 |
| 42 | AXA | 39.6 |
| 42 | Channel 4 | 39.6 |
| 44 | Lidl | 39.7 |
| 44 | YouTube | 39.7 |
| 46 | Volvo | 39.8 |
| 46 | Vauxhall | 39.8 |
| 48 | Heineken | 39.9 |
| 49 | Spotify | 40.0 |
| 49 | Sainsbury's | 40.0 |
| 51 | AirBnB | 40.1 |
| 51 | Nissan | 40.1 |
| 53 | Google | 40.4 |
| 54 | Land Rover | 40.5 |
| 55 | Amazon Prime | 40.8 |
| 56 | Barclays | 41.0 |
| 57 | Currys PC World | 41.1 |
| 58 | Snapchat | 41.2 |
| 59 | Best Western | 41.5 |
| 60 | Morrisons | 41.6 |
| 61 | Microsoft | 41.8 |
| 61 | The Daily Mail | 41.8 |
| 63 | Ramada | 41.9 |
| 63 | British Airways | 41.9 |
| 65 | BMW | 42.1 |
| 66 | EasyJet | 42.2 |
| 67 | Sky | 42.5 |
| 68 | Uber | 42.6 |
| 69 | Apple | 42.8 |
| 69 | Huawei | 42.8 |
| 69 | Instagram | 42.8 |
| 72 | Channel 5 | 42.9 |
| 73 | The Sun | 43.0 |
| 74 | LinkedIn | 43.2 |
| 75 | Volkswagen | 43.5 |
| 76 | American | 43.7 |
| 77 | The BBC | 44.2 |
| 78 | Twitter | 44.4 |
| 79 | TSB | 44.7 |
| 80 | Tesco | 44.8 |
| 81 | ITV | 45.1 |
| 82 | ASDA | 45.2 |
| 83 | W Hotels | 46.3 |
| 84 | German Wings | 46.4 |
| 85 | Autograph | 46.9 |
| 86 | Facebook | 47.5 |
| 87 | Allianz | 47.6 |
| 88 | RyanAir | 50.6 |

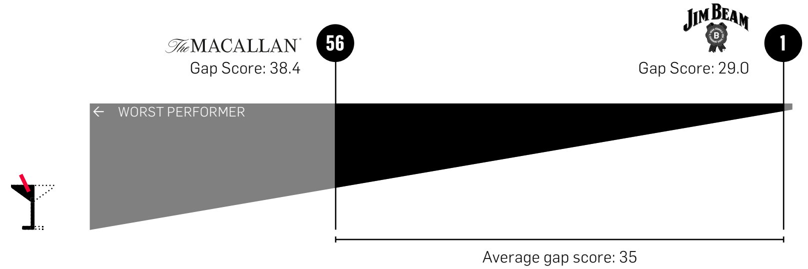
# UNITED STATES

74% of US consumers say they would stop using a brand if it no longer offered what it promised.

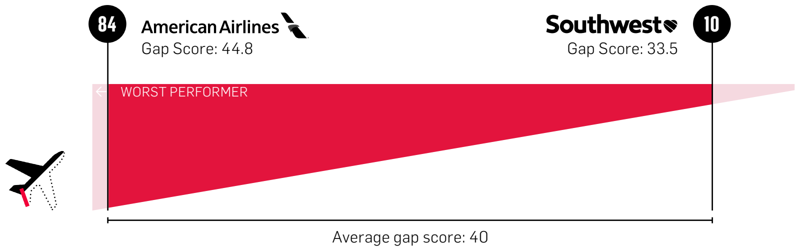
So airlines need to worry – many struggle with fulfilling even basic expectations like comfortable seats or well-maintained planes.

The exception to that rule is Southwest. Their reliability, excellent value and friendly staff help them deliver on their original mission – "offer low fares and superior Customer Service" – and prove it with a top 10 finish.

Huawei's large gap is driven by inconsistency, reliability issues and a failure to live up to its high performance promises. It can't help that the US government has banned its agencies from using Huawei products.




Like their British cousins, US consumers rate Alcohol brands as having the best alignment between promise and experience, with Jim Beam topping the ranking.




American Airlines props up the airline category – and the gap could be costing them half a billion dollars in lost revenue.

**IN THE US, THE EXPERIENCE GAP COSTS EACH BRAND ON AVERAGE BETWEEN $460M AND $860M IN LOST REVENUE EVERY YEAR**

# $460 - 860M

# US RANKING


| # | BRAND | GAP SCORE |
|---|---|---|
| 1 | Jim Beam | 29.0 |
| 2 | Toyota | 30.7 |
| 3 | Absolut Vodka | 31.7 |
| 4 | State Farm | 32.2 |
| 4 | Jack Daniel's | 32.2 |
| 6 | Geico | 32.6 |
| 7 | Honda | 33.1 |
| 8 | Miller | 33.2 |
| 8 | Bacardi (rum) | 33.2 |
| 10 | Southwest | 33.5 |
| 11 | Netflix | 33.6 |
| 12 | Budweiser | 33.7 |
| 12 | Allstate | 33.7 |
| 14 | Guinness | 34.0 |
| 14 | Marriott | 34.0 |
| 16 | Google | 34.1 |
| 16 | Chase | 34.1 |
| 18 | Amazon | 34.4 |
| 19 | Holiday Inn | 34.5 |
| 20 | Lowe's | 34.6 |
| 21 | Baileys | 34.8 |
| 22 | Samsung | 34.9 |
| 23 | Farmers Insurance | 35.0 |
| 23 | Bombay Sapphire | 35.0 |
| 23 | Ford | 35.0 |
| 26 | Best Western | 35.1 |
| 27 | Amazon Prime | 35.2 |
| 28 | Sam's Club | 35.3 |
| 29 | Kohl's | 35.4 |
| 30 | Stella Artois | 35.6 |
| 30 | PNC Bank | 35.6 |
| 30 | Home Depot | 35.6 |
| 33 | Costco | 35.7 |
| 34 | Jet Blue | 35.9 |
| 34 | Heineken | 35.9 |
| 34 | Kroger | 35.9 |
| 37 | IKEA | 36.2 |
| 38 | Jägermeister | 36.4 |
| 38 | LinkedIn | 36.4 |
| 40 | Radisson | 36.5 |
| 41 | GMC | 36.7 |
| 42 | YouTube | 37.0 |
| 42 | Bank of America | 37.0 |
| 42 | Nissan | 37.0 |
| 45 | Wyndham | 37.2 |
| 46 | Ritz Carlton | 37.4 |
| 46 | Hulu | 37.4 |
| 48 | Target | 37.6 |
| 49 | Hyundai | 37.7 |
| 50 | AirBnB | 37.8 |
| 51 | Ramada | 38.0 |
| 52 | Volkswagen | 38.1 |
| 53 | Fox | 38.3 |
| 53 | Sheraton | 38.3 |
| 53 | British Airways | 38.3 |
| 56 | Delta | 38.4 |
| 56 | Citi/Citibank | 38.4 |
| 56 | The Macallan | 38.4 |
| 59 | Snapchat | 38.6 |
| 59 | Audi | 38.6 |
| 61 | Mercedes-Benz | 38.7 |
| 62 | Liberty Mutual | 38.9 |
| 63 | Spotify | 39.2 |
| 64 | Apple | 39.3 |
| 64 | Wells Fargo | 39.3 |
| 64 | CBS | 39.3 |
| 64 | Virgin Atlantic | 39.3 |
| 68 | Microsoft | 39.6 |
| 69 | NBC | 40.3 |
| 70 | The New York Times | 41.1 |
| 71 | Emirates | 41.3 |
| 72 | Instagram | 41.6 |
| 72 | W Hotels | 41.6 |
| 74 | USA Today | 41.7 |
| 74 | Air France | 41.7 |
| 76 | Twitter | 41.8 |
| 77 | BMW | 41.9 |
| 78 | Uber | 42.6 |
| 78 | KLM | 42.6 |
| 80 | Walmart | 42.8 |
| 81 | Comcast | 43.8 |
| 82 | United | 44.0 |
| 83 | Facebook | 44.2 |
| 84 | American | 44.8 |
| 85 | ABC | 45.0 |
| 86 | Huawei | 45.1 |

**IN GERMANY, THE EXPERIENCE GAP COSTS EACH BRAND ON AVERAGE BETWEEN €285M AND €525M IN LOST REVENUE EVERY YEAR**

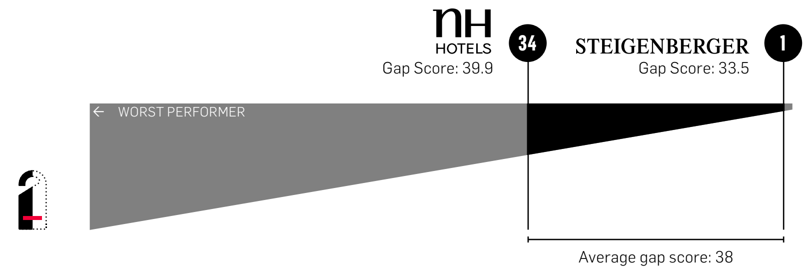
# €285 - 525M

# GERMANY

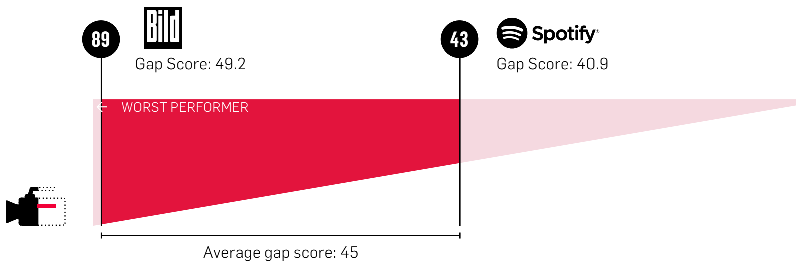
Nearly two thirds of German consumers say that all they care about is the experience – and in comparison to the UK and US, they are more critical of brands who fail to deliver their promises.

In particular, they are highly critical of tech brands, with Facebook being singled out for heavy criticism on data security, privacy and user friendliness – and the biggest overall Experience Gap in the whole study.

Steigenberger and HUK Coburg both do well by delivering the basics in completely different categories to an extremely high standard – proving that regardless of the size and shape of your business, you can do a brilliant job of keeping your promises.




Germans give hoteliers the best gap scores – with many brands in the category matching or exceeding expectations on a broad range of experience factors, from food to comfort, privacy to flexibility.




However, traditional media brands really struggle, highlighting a real lack of trust amongst German consumers.

# GERMANY RANKING


| # | BRAND | GAP SCORE |
|---|---|---|
| 1 | Steigenberger | 33.5 |
| 1 | HUK Coburg | 33.5 |
| 3 | DiBa | 34.4 |
| 4 | Baileys | 35.2 |
| 5 | Lidl | 35.3 |
| 6 | Emirates | 35.5 |
| 7 | Hyundai | 35.9 |
| 8 | Accor | 37.0 |
| 8 | Marriott | 37.0 |
| 10 | Jägermeister | 37.3 |
| 11 | Amazon | 37.4 |
| 12 | Best Western | 37.5 |
| 12 | Allianz | 37.5 |
| 14 | Volvo | 37.7 |
| 15 | Sheraton | 37.8 |
| 16 | Maritim | 38.1 |
| 17 | Mercure | 38.2 |
| 17 | Holiday Inn | 38.2 |
| 19 | Bitburger | 38.3 |
| 20 | Radisson | 38.5 |
| 21 | Swiss | 38.6 |
| 22 | Ramada | 38.7 |
| 23 | Audi | 38.9 |
| 23 | Intercontinental | 38.9 |
| 23 | Absolut Vodka | 38.9 |
| 26 | Kleiner Feigling | 39.2 |
| 27 | BMW | 39.3 |
| 27 | Ramazotti | 39.3 |
| 27 | Four Seasons | 39.3 |
| 30 | Alnatura | 39.4 |
| 31 | Lufthansa | 39.5 |
| 32 | Volksbank | 39.7 |
| 32 | Warsteiner | 39.7 |
| 34 | NH Hotels | 39.9 |
| 35 | Bacardi (rum) | 40.0 |
| 36 | Krombacher | 40.1 |
| 37 | Samsung | 40.3 |
| 38 | Ford | 40.6 |
| 39 | Toyota | 40.7 |
| 39 | Apple | 40.7 |
| 39 | Mercedes-Benz | 40.7 |
| 42 | Kuemmerling | 40.8 |
| 43 | Spotify | 40.9 |
| 44 | IKEA | 41.0 |
| 45 | Aldi | 41.1 |
| 46 | Nissan | 41.2 |
| 47 | Sparkasse | 41.3 |
| 48 | N26 | 41.4 |
| 48 | Netflix | 41.4 |
| 48 | MediaMarkt | 41.4 |
| 48 | Commerzbank | 41.4 |
| 52 | Becks | 41.5 |
| 53 | Huawei | 41.6 |
| 54 | Expert | 41.7 |
| 54 | Google | 41.7 |
| 56 | Real.- | 41.9 |
| 57 | Opel | 42.1 |
| 58 | AXA | 42.2 |
| 59 | Amazon Prime | 42.5 |
| 59 | Die Zeit | 42.5 |
| 61 | Austrian | 42.6 |
| 62 | Condor | 42.7 |
| 63 | LinkedIn | 42.9 |
| 64 | Edeka | 43.3 |
| 64 | YouTube | 43.3 |
| 66 | British Airways | 43.5 |
| 66 | Saturn | 43.5 |
| 68 | Instagram | 44.0 |
| 69 | German Wings | 44.2 |
| 70 | Veltins | 44.3 |
| 71 | REWE | 44.4 |
| 72 | Snapchat | 44.8 |
| 72 | Uber | 44.8 |
| 74 | EasyJet | 44.9 |
| 75 | ProSieben | 45.0 |
| 76 | Generali | 45.1 |
| 77 | Deutsche Bank | 45.7 |
| 78 | Volkswagen | 45.9 |
| 78 | Microsoft | 45.9 |
| 80 | Twitter | 46.1 |
| 81 | Penny | 46.4 |
| 82 | ARD | 46.9 |
| 83 | Eurowings | 47.3 |
| 84 | ZDF | 48.2 |
| 85 | Sky | 48.5 |
| 86 | RyanAir | 48.8 |
| 87 | Postbank | 48.9 |
| 88 | RTL | 49.0 |
| 89 | BILD | 49.2 |
| 90 | Facebook | 53.0 |

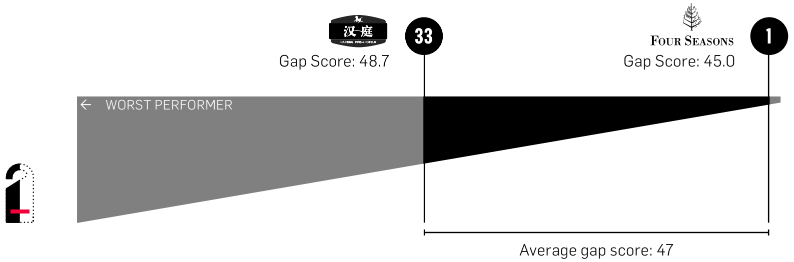
# CHINA

The Chinese are by far the most critical group of consumers in the Experience Gap study. They universally criticise brands for failing to match the expectations set by their communications.

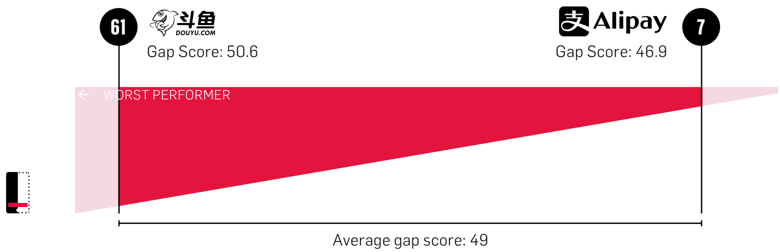
This cynicism in best demonstrated by the fact that nearly ¾ of Chinese consumers never take what brands say at face value.

As in Germany, hoteliers do better than other categories – but in China even these brands find it impossible to delight an audience with extremely high expectations.

Surprisingly, globally renowned brands like Alibaba and WeChat come in for particularly harsh criticism, failing to deliver against the most important experience factors.




Western hotel brands do well here – perhaps an illustration that Chinese consumers still believe that these brands are more reliable and consistent than their Chinese counterparts.




Alipay, the world's largest payment platform, outperforms the tech category by being easy to use and reliable – crucial in the world of digital money transfer.

**IN CHINA, THE EXPERIENCE GAP COSTS EACH BRAND ON AVERAGE BETWEEN ¥5.9BN AND ¥7.4BN IN LOST REVENUE EVERY YEAR**

# ¥5.9 - 7.4BN

# CHINA RANKING


| # | BRAND | GAP SCORE |
|---|---|---|
| 1 | Four Seasons | 45.0 |
| 2 | Sheraton | 46.0 |
| 3 | Intercontinental | 46.3 |
| 4 | Marriott | 46.5 |
| 5 | IKEA | 46.6 |
| 6 | EVA Air | 46.7 |
| 7 | Alipay | 46.9 |
| 7 | Ping An Bank | 46.9 |
| 7 | China Eastern Airlines | 46.9 |
| 10 | Audi | 47.0 |
| 10 | Ritz Carlton | 47.0 |
| 12 | Tsingtao Beer | 47.1 |
| 13 | JD.com | 47.5 |
| 13 | Hema Xiansheng | 47.5 |
| 15 | Huawei | 47.6 |
| 16 | Air China | 47.7 |
| 16 | Geely | 47.7 |
| 18 | Vienna Hotel Groups | 47.8 |
| 18 | Bank of Communications | 47.8 |
| 18 | Maotai | 47.8 |
| 18 | Jin Jiang Inn | 47.8 |
| 22 | Mercedes-Benz | 47.9 |
| 22 | New Century | 47.9 |
| 22 | Best Western | 47.9 |
| 25 | Volkswagen | 48.1 |
| 26 | China Merchants Bank | 48.3 |
| 26 | Jian nan chun | 48.3 |
| 28 | GreenTree Inn | 48.4 |
| 28 | China Life | 48.4 |
| 28 | China Southern Airlines | 48.4 |
| 31 | Holiday Inn | 48.5 |
| 31 | Toyota | 48.5 |
| 33 | Xiaomi | 48.7 |
| 33 | Buick | 48.7 |
| 33 | Home Inn | 48.7 |
| 33 | Hainan Airlines | 48.7 |
| 33 | Hanting Inns | 48.7 |
| 38 | Changan | 48.8 |
| 38 | Tianjin Airlines | 48.8 |
| 38 | Baojun | 48.8 |
| 41 | Honda | 48.9 |
| 42 | China Airlines | 49.1 |
| 43 | Hyundai | 49.2 |
| 43 | Nissan | 49.2 |
| 45 | Microsoft | 49.3 |
| 46 | Suning | 49.5 |
| 47 | Apple | 49.6 |
| 48 | Yanjing Beer | 49.7 |
| 48 | Sina weibo | 49.7 |
| 50 | Vanguard | 49.8 |
| 51 | GOME Electrical Appliances | 49.9 |
| 52 | Youku Tudou | 50.0 |
| 53 | Alibaba | 50.1 |
| 53 | Samsung | 50.1 |
| 53 | Didi Chuxing | 50.1 |
| 56 | Tencent Video | 50.2 |
| 56 | Snow Beer | 50.2 |
| 58 | Walmart | 50.3 |
| 59 | Wechat | 50.5 |
| 59 | Hua xia bank | 50.5 |
| 61 | Douyu | 50.6 |
| 62 | Nonggongshang | 50.8 |
| 62 | Xiami | 50.8 |
| 64 | Lianhua | 51.0 |
| 65 | iQiyi | 52.0 |

# 5 STEPS TO CLOSING THE GAP

We know the gap exists.

We know it's large.

And we know it's expensive.

It costs brands around the world between $287m and $1.08bn in lost revenue every year.

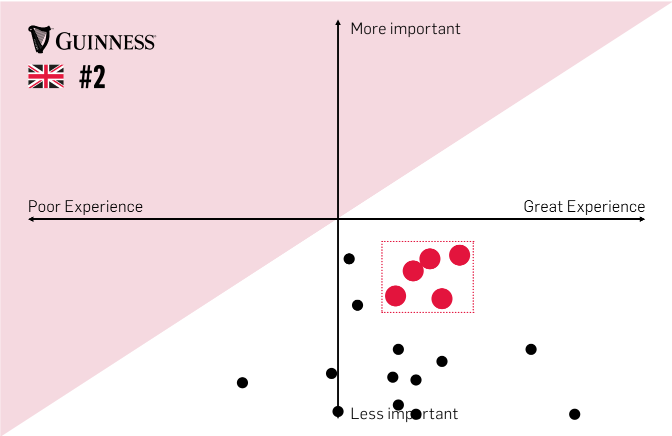
It's a risk factor that brands cannot ignore.

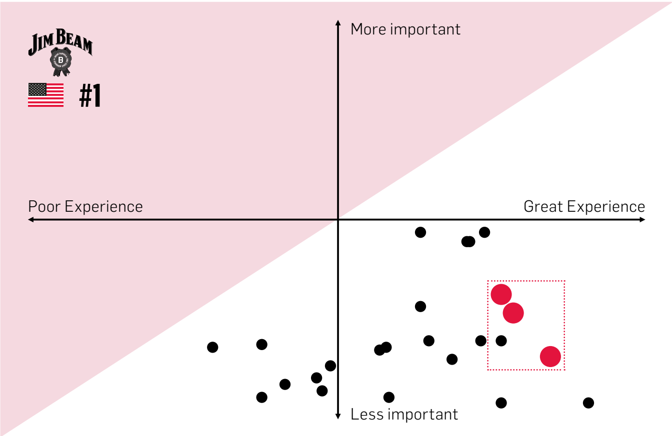
CLEAR has identified five things brands need to focus on to close the Experience Gap.

1. Make human connections count – understand where to add humanity back into the experience
2. Make your promises authentic – and work out how you'll deliver on them
3. Deliver the basics, brilliantly – when you don't, the gap widens
4. Demonstrate that you value your customers' data – by being more personal, customisable and responsible
5. Be uncompromisingly consistent in the areas that matter most to your customers

Both brands deliver on their core promises in an authentic, believable way across the whole experience.

Guinness's 'Made of more' and Beam's 'Make History' are both anchored in the actual brand experience. They are tangible and believable – and lead to these brands having smaller Experience Gaps.




# MAKE YOUR PROMISES AUTHENTIC

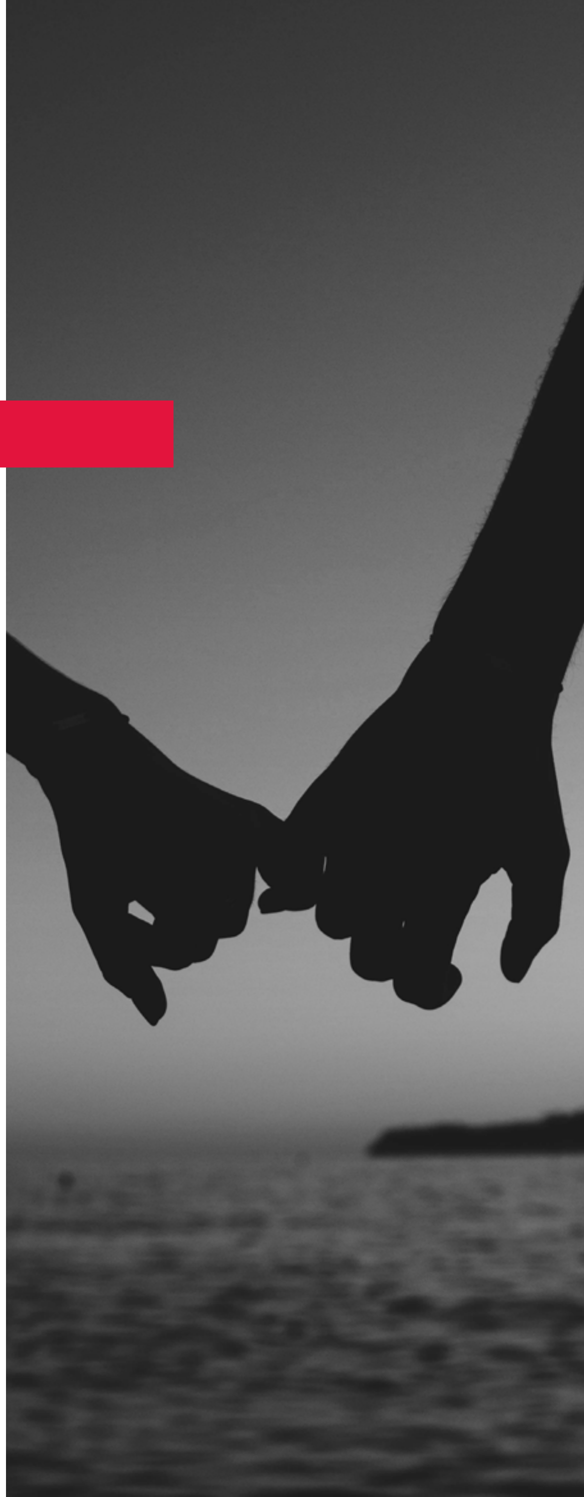
## ...AND WORK OUT HOW YOU'LL DELIVER ON THEM

Authenticity is a crucial element in creating a well aligned promise and experience. Yet only 33% of consumers think brands make realistic claims.

It's vital that brands remember that Experience Gaps are caused as much by overblown promises as undercooked experiences.

So by all means focus on mapping your experience – but make sure you also invest in messaging and communications that are authentic, believable and in some way tangible. Be transparent about what you've achieved – and demonstrate progress towards your loftier, more aspirational goals.

Alcohol brands do this brilliantly – so it's no surprise that they appear toward the top of the rankings in every market.

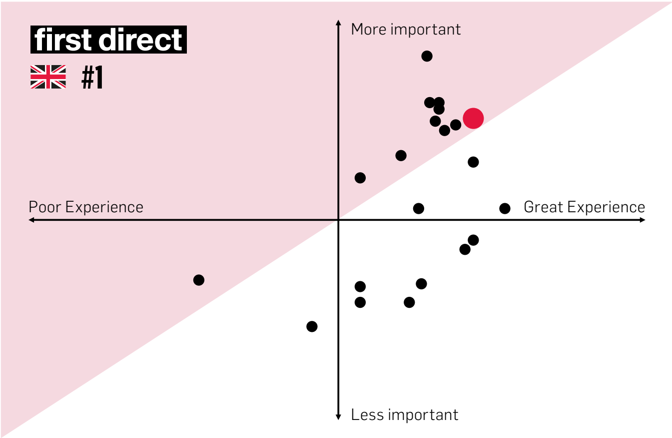


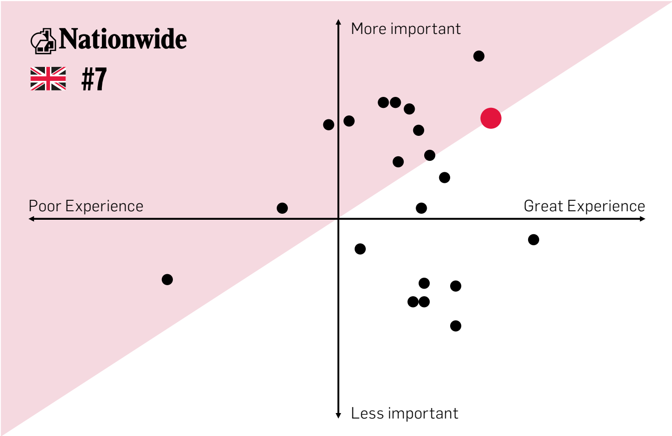
At a time when many brands are cutting costs and moving customer services away from stores, branches and call centres and towards online and digital solutions, the human touch is still hugely valued. But brands can't afford to have staff for every eventuality – it just isn't practical.

Instead, we recommend that brands invest in making the human connections they do have with their customers REALLY count. By all means be selective, but make sure that your people operate at the very highest standards when they interact with your customers – and close the gap.

Some of the highest scoring brands in our study are those that offer consumers a direct route to a real human being, when they really need it.

# MAKE HUMAN CONNECTIONS COUNT

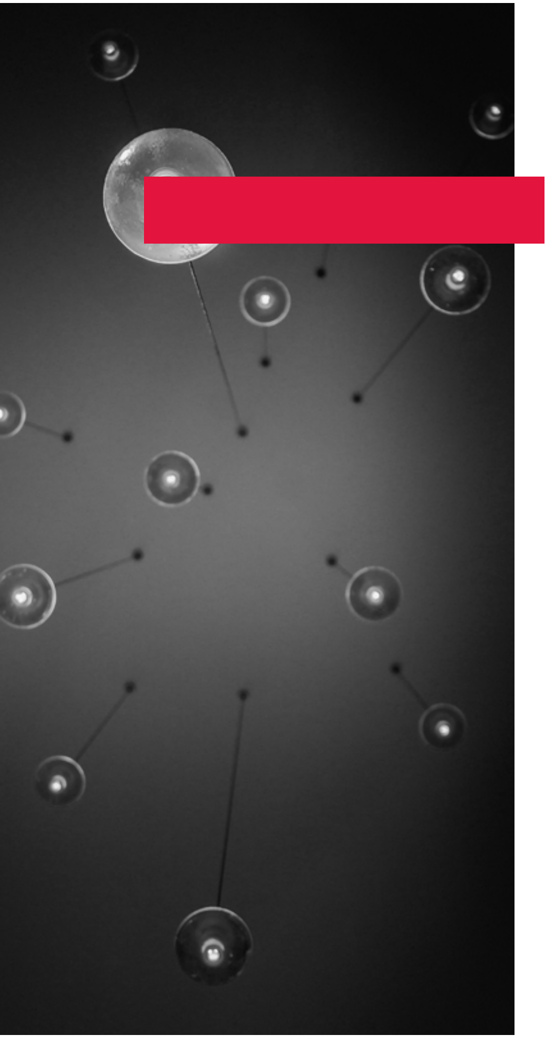



*Statement = they make it easy to speak to a real person when help is needed*

Both these brands score highly on being able to access a real human when help is needed - despite being Financial Services brands – not typically recognised for being human or customer first.

Their human touch has allowed both brands to elevate themselves in their category and overall - by offering a real point of difference that consumers highly value – one that really matters, and closes the Experience Gap.



# DELIVER THE BASICS BRILLIANTLY

### ...WHEN YOU DON'T THE GAP WIDENS

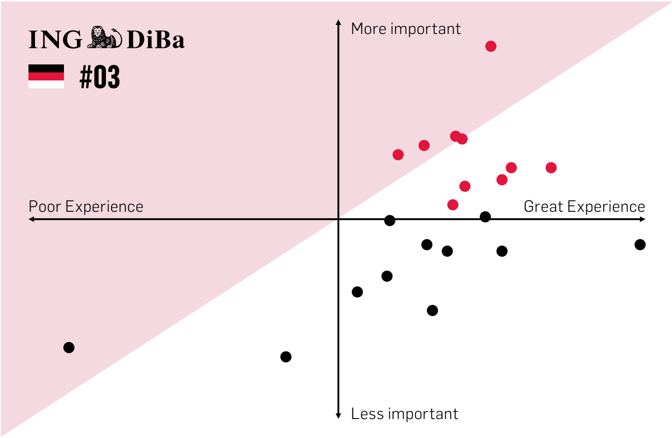
Despite big bold marketing promises, many brands simply fail to deliver on the basics.

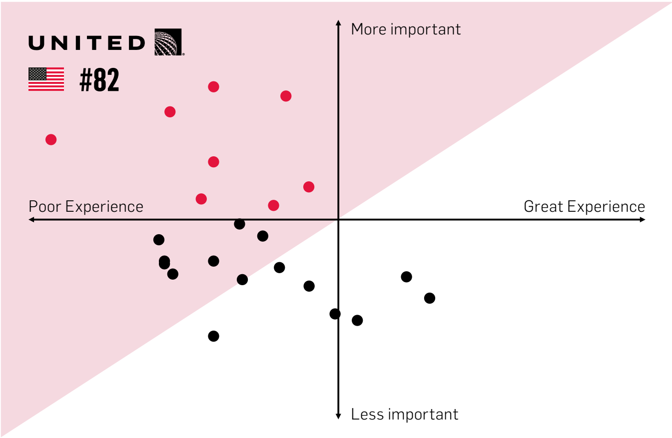
In the rush to deliver always on, digitally enabled, app driven experiences to 'transform your life', brands often forget to deliver a service that works simply and easily, day after day.

Consumers will judge you harshly for these failures – going so far as to switch brands entirely when you break a basic promise.

Look at the recent issues with United Airlines, who are as famous for dragging passengers off their planes and killing puppies as they are for flying you to your destination on time.

But beneath these extremes they are failing to meet many of the basic expectations of flying. As a result, they have a huge experience gap.




The DiBa brand performs brilliantly on the real basics of the category – protecting customer data, quick & simple processes and being both a reliable and fair brand. The result? A small Experience Gap.

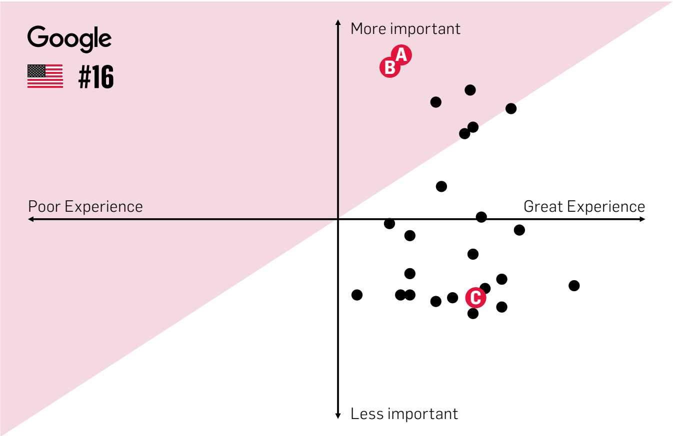
In contrast, United doesn't deliver well on anything that matters to consumers, especially the absolute basics.
The brand scores poorly on clean, well-kept cabins, protecting customers' data and getting customers to their destinations on time in comfort. As the airline continues its growth drive the Experience Gap represents a sizeable risk.

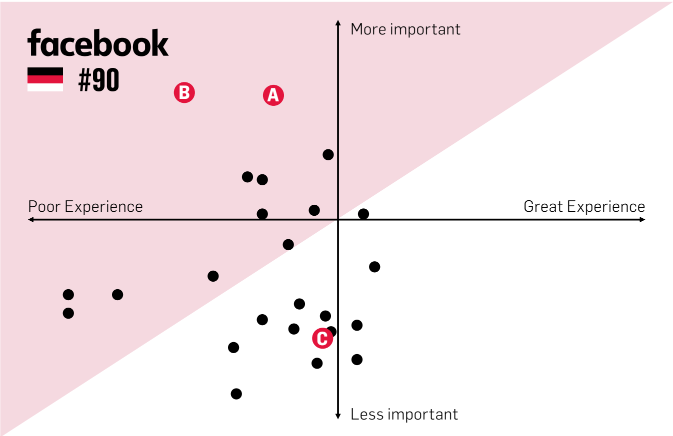
# DEMONSTRATE THAT YOU VALUE YOUR CUSTOMERS' DATA

### ...BY BEING MORE PERSONAL, CUSTOMISABLE AND RESPONSIBLE

We all know Google collects a vast amount of information about your every click, but they also put it to good use – our respondents believe Google is being responsible with how they collect and use consumer data and that they are being offered a more personalised experience in return.

In stark contrast, users do not believe Facebook are being responsible with their data nor that the company has good security/privacy features. At the same time, most don't believe that Facebook offer a more personalised experience in exchange for their data. For a business whose revenues depend on being able to serve content to a captive and receptive audience, the Experience Gap represents a clear and concerning risk.




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

Every day more and more data is created by consumers and then harvested, analysed and monetised by powerful companies in every sector.

The Experience Gap demonstrates how the treatment of data, has become a crucial factor in how trustworthy a brand is in consumers eyes. In a post GDPR world, consumers are now incredibly conscious of how their data is held and used. And if they can't see a tangible benefit from this mass data collection, they'll withdraw their consent for you to use it.

Compare and contrast the performance of Facebook and Google in our study.

Unsurprisingly, given the recent Cambridge Analytica scandal, Facebook doesn't score well on data responsibility. But even worse than that, users don't even believe their data is being used to create a better, more personalised experience for them.

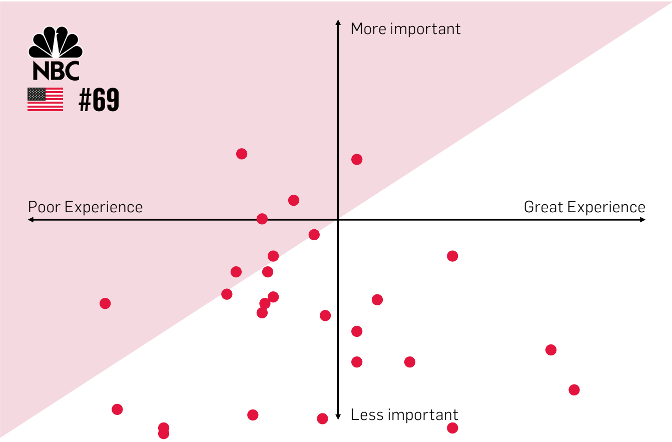
Google, despite collecting a similar (if not greater) amount of data to Facebook on our digital lives, has a smaller Experience Gap. Consumers believe they are putting user data to much better use – to deliver faster and more relevant search results, tailored transport recommendations, and auto-completing information to save you time online – in essence, delivering good value in exchange.

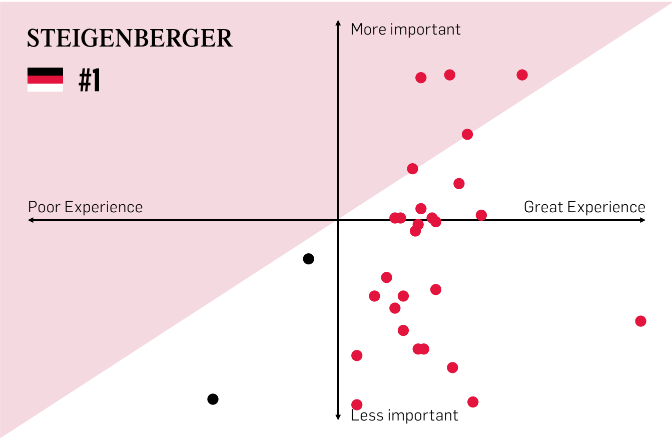
# BE UNCOMPROMISINGLY CONSISTENT IN THE AREAS THAT MATTER TO YOUR CUSTOMERS

Your Experience Gap is like a fingerprint – no other brand has the same set of consumer demands. So whilst it might feel impossible to be consistently brilliant everywhere, you can prioritise your investment to concentrate on the elements that matter most to your customers.

Once you know where to focus your efforts and budget, make sure you're uncompromisingly consistent. Nothing increases the Experience Gap like inconsistency.

Brands with the smallest gaps do a great job of bringing together cross-functional teams in the service of a consistently great experience – no mean feat in large, multi-national businesses.




NBC demonstrates that brands are sometimes unaware of what their customers really value in the experience. It over delivers on some important experience factors (e.g. flexibility to consume content in many different ways) and yet under delivers in many others. The good news is that NBC has a number of areas to focus on immediately to help close the Experience Gap.

Steigenberger, joint top in Germany, is a brand that has successfully identified what matters most to its customers – and prioritised investment accordingly.

# METHODOLOGY

## ABOUT THE REPORT

To size the experience gap and determine how much it is costing brands, CLEAR fielded an online survey with 34,000 respondents in four countries to gather perspectives on brand experience, brand messaging and how well different categories and brands are meeting consumer expectations.

During the study, respondents collectively rated a total of 225 brands. The brands were selected as a representative set that respondents would be most likely to know and/or use in each country.

## SAMPLE SET

Between July and September 2018, CLEAR used an online survey to poll 34,040 consumers in 4 countries:

- United Kingdom: 8,817
- United States: 9,151
- Germany: 8,921
- China: 7,151

## SURVEY TOPICS

Respondents answered several questions about categories and brands that they are familiar with.

Survey topics included:

- Last memorable experience with the brand
- What the brand is trying to stand for and which of those is most important
- Must-have and Stand-out attributes within the category
- Method and reason for interaction
- How well the brand performed on category attributes
- General and provider specific attitudes

## EXPERIENCE GAP SCORE

Based on a recent experience, respondents were asked how well they felt the brand delivered on their marketing promises, if a brand needed to work harder to match the experience to what they claim, and whether the brand offered the same quality of experience in everything they do, all on a 1 to 5 scale. The gap score is based all three components, where the brand delivering on their promises minus the extent to which the brand needs to work harder to match the experience they claim with consistency of experience as a multiplier, the more consistent the experience, the better the score.

## GAP COST VALUES

Gap cost values were calculated at the category level using publicly available financial and customer data. These values were then attributed to switching behaviour based on a distribution of respondent level gap scores and how each subset answered a question on whether they would be more or less likely to switch brands.

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

We identify a brand's experience fingerprint, index and prioritise strategic investment and innovation and then operationalise through product and service design.

CLEAR is a division of M&C Saatchi, one of the world's leading marketing services groups. The company is head-quartered in London, England, with offices throughout the world.

## GLOBAL MARKETING STRATEGY CONSULTANCY

We believe that in a world filled with unsubstantiated opinions, clarity has never been more important. We bring this clarity to our client's toughest transformation questions, predominantly in three areas relating to brand, experience and innovation.

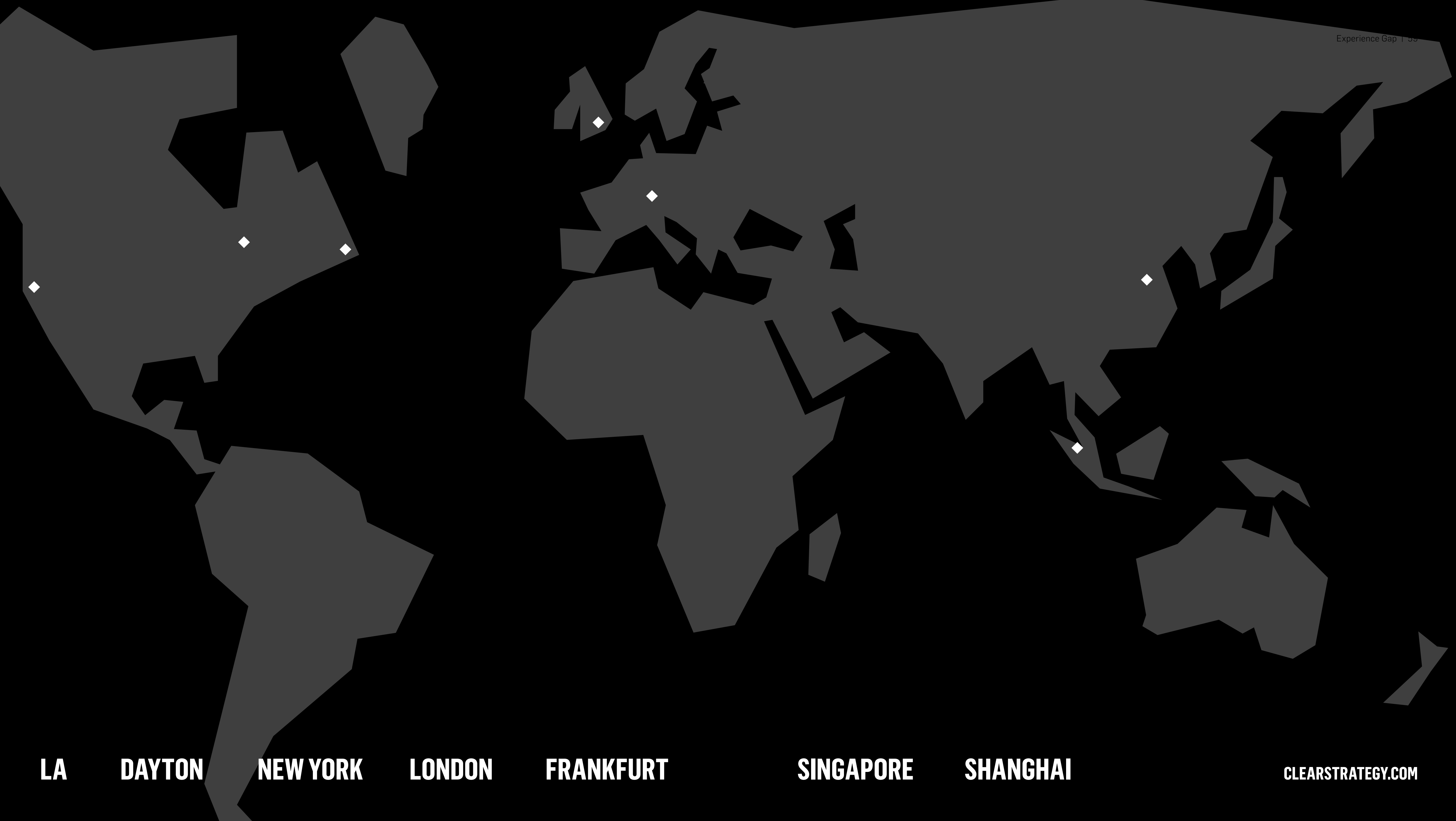
We take our clients on a journey from a clear insight, through identifying the opportunity to defining the strategy and bringing that to life.

Doing this requires a unique blend of skill-sets.

We've built a team of brand strategists, management consultants, semiotician, retail experts, marketing scientists, designers, digital product innovators and qualitative researchers all in the service of solving our clients' most challenging questions.

We work with clients across a broad range of industries-including FMCG, Consumer Healthcare, QSR, Technology, Retail and Banking and we have offices in London, New York, Los Angeles, Dayton, Singapore, Shanghai and now, Frankfurt.

# BRANDS THAT CLOSE THE EXPERIENCE GAP, WIN.

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