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# Are Brands Giving Customers the Experiences They Want?

**Customers today are entirely different as we emerge from the aftermath of the COVID-19 pandemic.** People's expectations and values have changed in their daily lives, and this influences how they feel about brands and brand experiences. In light of this emerging reality, what must brands understand and undertake to adjust to these transformations?

Our recent study shows that there is work to be done to bring experiences in line with what people want. The Publicis Sapient Global Customer Experience Survey 2023 of more than 6,500 consumers across France, Germany, the United Kingdom and the United States aimed to understand people's customer experiences, what they value about those experiences and what they expect from the brands they love. The results were surprising—and offer insightful knowledge to help today's brands drive positive transformation across their customer experience journey.
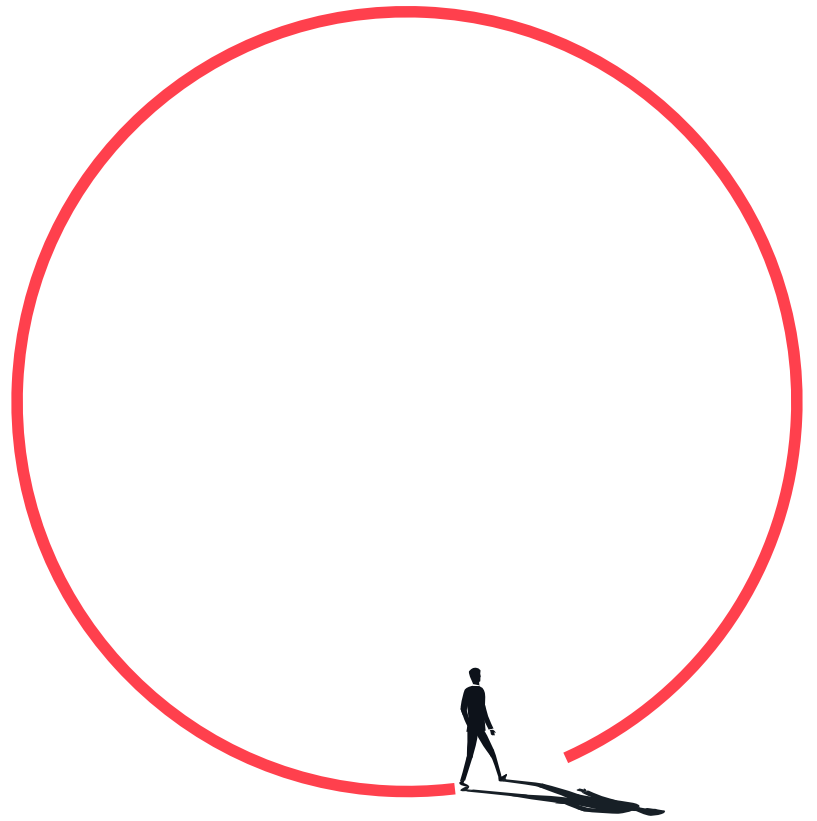
# What people want from their customer experience is not what they're getting

People have high expectations for a seamless, convenient and positive customer experience, but their level of satisfaction with experiences across industries including healthcare, retail and banking do not align. According to our global survey, healthcare shows the largest gap (40 percent) between what customers want from experiences and what they get, followed by the utilities and banking industries (37 percent and 31 percent, respectively).

| Customer Experience | | | |
|---|---|---|---|
| Industries | Importance | Satisfaction | Gap |
| Airlines | 59% | 33% | 26% |
| Healthcare | 87% | 47% | 40% |
| Utilities | 73% | 36% | 37% |
| Retail | 65% | 46% | 19% |
| Technology | 66% | 44% | 22% |
| Banking | 78% | 47% | 31% |
| Grocery | 73% | 54% | 19% |

*Percentages are Top 2-Box (Extremely/Very Important/Satisfied)*

# Experience gaps vary across countries

The experience gaps in healthcare are most notable among consumers in the United Kingdom (47 percent) and in Germany (43 percent). Similarly, those in the U.K. are experiencing the largest gap between expectations and experiences in the utilities industry (50 percent), followed by French (38 percent), German (30 percent) and U.S. (27 percent) consumers.

| Customer Experience Gap Between Importance and Satisfaction | | | | | |
|---|---|---|---|---|---|
| Industries | DE | FR | U.K. | U.S. | Global |
| Airlines | 22% | 13% | 32% | 32% | 26% |
| Healthcare | 43% | 35% | 47% | 28% | 40% |
| Utilities | 30% | 38% | 50% | 27% | 37% |
| Retail | 19% | 12% | 21% | 23% | 19% |
| Technology | 23% | 14% | 26% | 23% | 22% |
| Banking | 33% | 31% | 34% | 22% | 31% |
| Grocery | 24% | 26% | 12% | 14% | 19% |

# The gender divide

While there are clear differences across industries and regions in terms of customers' experiences, there are also significant differences in how different genders perceive their experiences with brands.

For instance, customer experiences aren't wowing women. Women have high expectations of brands, but experiences aren't meeting those expectations across industries. In fact, the expectation/satisfaction gap is greater overall for women than men. Our research revealed the largest gap for women is in healthcare experiences—a 45 percent gap compared to 36 percent for men and 40 percent across all consumers globally.

By using data to better understand and respond to the needs of women and men, brands have the opportunity to improve experiences and close these gaps. How are their shopping habits and behaviors different? What do they value most from experiences? In healthcare, where the gap is widest, companies could make a greater effort to understand the types of experiences women want. Is it more convenient scheduling, appointments available "after hours" or a wider array of services tailored to the needs of women?

| | Gender | | | | | |
|---|---|---|---|---|---|---|
| | Male | | | Female | | |
| Industries | Importance | Satisfaction | Gap | Importance | Satisfaction | Gap |
| Airlines | 56% | 32% | 24% | 62% | 34% | 28% |
| Healthcare | 84% | 48% | 36% | 91% | 46% | 45% |
| Utilities | 69% | 34% | 35% | 76% | 37% | 39% |
| Retail | 62% | 44% | 18% | 69% | 49% | 20% |
| Technology | 66% | 47% | 19% | 66% | 41% | 25% |
| Banking | 76% | 45% | 31% | 80% | 48% | 32% |
| Grocery | 68% | 52% | 16% | 77% | 56% | 21% |

*Percentages are Top 2-Box (Extremely/Very Important/Satisfied)*

# Get it right or lose a customer

Our research shows that customer experiences can make or break relationships between people and brands. A majority of customers (78 percent) will simply stop shopping at the places they love if they have bad experiences. For one in four people, even one bad experience will turn them away from a brand. These situations might include rude salespeople, long lines, lack of online/in-store product alignment and disappointing interactions such as coupons that aren't accepted or gift cards that don't work.

The good news is that people may excuse a bad experience if the other experiences they have with a brand are positive—but they want consistency. Consumers prefer seamless experiences every time they interact with a brand. A majority (92 percent) say their most recent experience is just as, if not more, important than past experiences. This was especially true for consumers in France, followed by those in Germany.

| | DE | FR | U.K. | U.S. |
|---|---|---|---|---|
| **46%** say their most recent experience is *just as important* as past experiences | | | | |
| Recent experiences have the same importance as past experiences | 49% | 54% | 42% | 43% |
| **29%** say it is *somewhat more important* than past experiences | | | | |
| Recent experiences are somewhat more important than past experiences | 26% | 22% | 35% | 29% |
| **17%** say it is *much more important* than past experiences | | | | |
| Recent experiences are much more important than past experiences | 17% | 13% | 18% | 19% |

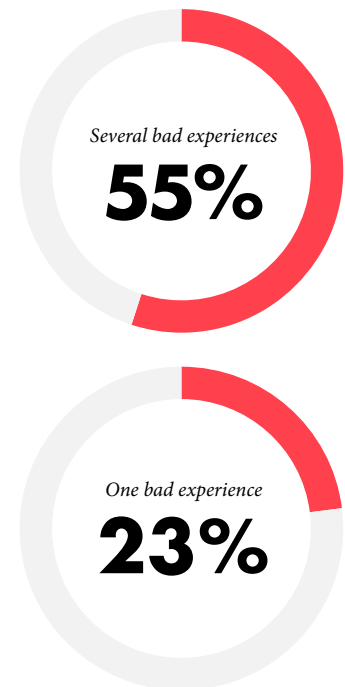*Several bad experiences*

**55%**

*One bad experience*

**23%**

Our research also revealed that all over the world, most customers will stick around after a bad experience—but for how long? Across the countries we surveyed, some people will leave after one bad experience:

| GERMANY | FRANCE | UNITED KINGDOM | UNITED STATES |
|---|---|---|---|
| *1 in 5* | *1 in 3* | *1 in 4* | *1 in 5* |
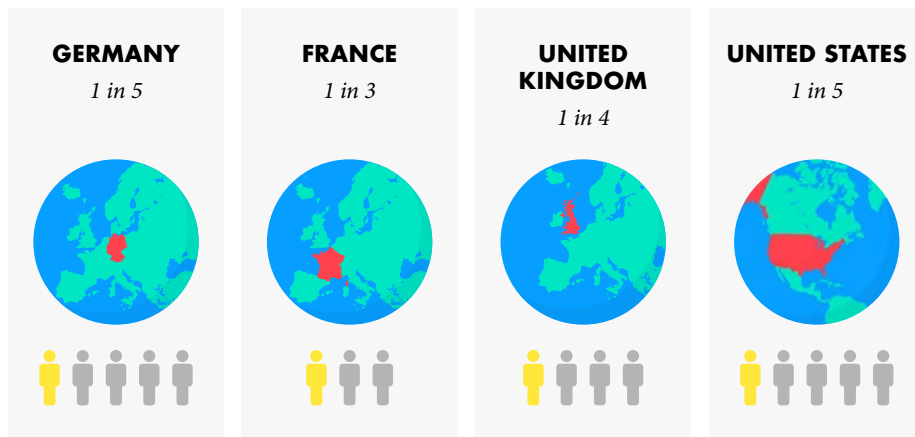
Although it's great news that some people will stay after negative experiences, it's better to avoid those experiences in the first place. Customers won't always take the time to interact with a brand if they need support or need to ask a question—they might just move on. However, if brands are proactive through ongoing, tailored messaging, they can open a channel for customer support so that people get the answers they want or find what they're looking for without having to chase a brand.

Consumers in France have the highest likelihood to stop interacting with a brand after one bad experience—36 percent compared to just 17 percent in the U.S.

| | After one bad experience | After several bad experiences |
|---|---|---|
| DE | 19% | 60% |
| FR | 36% | 38% |
| U.K. | 25% | 60% |
| U.S. | 17% | 54% |

# Happy customers are buying customers

Good customer experiences and interactions influence consumers' decisions to buy—or not buy—from a brand. People like frequent, hyper-personalized communications. Consumers love it when their favorite brand sends a reminder of an upcoming sale, or they text a coupon in real time during a shopping experience. It's about being proactive, understanding each consumer and delivering what they want, when they want it.

Again, this requires capturing and acting on data insights. Brands that track customer behavior, interactions and patterns can use that data to communicate in more relevant and personalized ways. Our research indicates that price and quality of brand/service are not the most important factors to them. In fact, among consumers we surveyed, only 11 percent would never stop interacting with a brand if the price was right. Seamless end-to-end purchasing experiences that are positive and consistent are key, so brands need to use the data they have to deliver them.

|  | DE | FR | U.K. | U.S. | Global |
|---|---|---|---|---|---|
| Rewards and shares value with me through a loyalty program | 48% | 57% | 52% | 57% | 53% |
| Sends me promotions/discounts based on what it knows about me | 38% | 51% | 42% | 51% | 44% |
| Gives me relevant product/service recommendations | 40% | 42% | 34% | 47% | 39% |
| Sends me timely communications tied to key moments | 39% | 33% | 26% | 39% | 33% |
| Reminds me of things I want to know but may not be keeping track of | 38% | 31% | 27% | 38% | 33% |
| Knows me no matter where I interact with the brand/business | 25% | 26% | 22% | 37% | 26% |
| Tailors messaging to me and my needs | 30% | 40% | 26% | 36% | 31% |
| Follows up with me post-purchase | 20% | 46% | 22% | 35% | 27% |
| Shows up in my frequently visited websites/apps | 20% | 22% | 13% | 28% | 19% |
| Messages/talks to me when I am in shopping mode | 24% | 30% | 11% | 27% | 21% |
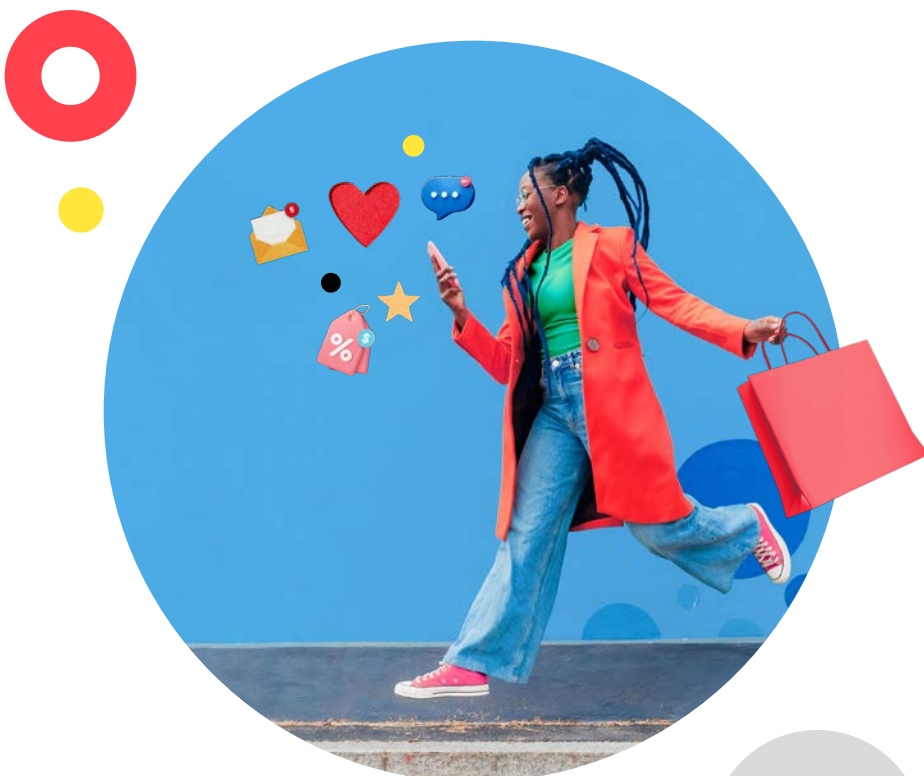
# Closing the customer experience gap

To thrive in the post-COVID era, it's time for brands to close the gap between customer dreams and realities. Businesses across industries can improve customer experiences to increase market share, build loyalty, and grow customer lifetime value. Here's how.

**6 actions**

### 1. KNOW YOUR CUSTOMER

The key to delivering an exceptional customer experience is knowing and understanding your customer. Brands can modernize their customer and employee experience by collecting and connecting data and insights in a singular customer data platform. Using these insights, brands can hyper-personalize experiences across channels and touchpoints.

*Working with Miral, we built a digital platform to connect attractions on Yas Island. Visitors have a unique customer ID that enables Miral to better understand people's preferences and the company is collecting customer data through an integrated website and mobile app. Miral can now extend targeted offers and deliver more personalized services that improve customer experiences.*

### 2. TRANSFORM THE CUSTOMER JOURNEY

Improve your customer experience strategy based on data rather than assumptions. Brands can close the gap between what customers expect and what the organization delivers by transforming a single or set of customer or partner journeys.

*Partnering with Ford, we redesigned its reservations to integrate customer touchpoints (app, web, dealer) through new dealer service advisor tools and systems in an operationally demanding journey.*

### 3. INTEGRATE THE TECHNOLOGY

Create more satisfying customer experiences by eliminating disjointed, patchworked technology. With consistent processes, technology, tools and connected platforms, businesses can deliver cohesive experiences that are fueled by integrated data and a strong digital backbone.

*Joining forces with Universal Parks and Resorts, we created a cohesive digital experience strategy that aligns a complex ecosystem of brands, locations and touchpoints.*

### 4. OPTIMIZE THE PRODUCT EXPERIENCE

While your products may be lovable on their own, it is imperative to also look for ways to optimize interactions by offering the right products through the right channels at the right time—and in a customized way.

*Collaborating with Bang & Olufsen, we developed a story-led commerce approach that engages consumers through immersive curated content, showcasing the company's rich history and products.*

### 5. EXTEND THE ENVIRONMENT

Connect your physical environments to the digital world to enhance experiences. Integration of digital into physical venues brings the promise of omnichannel to brick and mortar. For instance, in retail spaces, brands can use the data they have from digital channels to hyper-personalize the customer experience.

*Teaming up with Carnival Cruise Line, we created the Pixels Gallery, which combines a digital platform and a physical gallery space so that guests can view their photos anywhere and anytime. Now, more guests are engaging with their photos, enhancing their cruise experience while boosting photo sales.*

### 6. PARTNER FOR POWER

Use the power of ecosystem partnerships to transform your customer experiences. By creating a retail media network, brands can tap into first-party customer data and insights to enhance the customer experience and deliver more personalized and relevant content.

*Working with an American grocery chain, we built a retail media network that provides trust, transparency and a higher return on ad spend for the grocer's CPG vendor partners—and in turn, delivered high-margin, non-linear revenue for their own business.*

As customer expectations continue to change, brands must change with them. For over 30 years, we've been helping our clients use the power of digital to transform experiences for customers and unlock new value. Transformation, done right, happens with and for people, not to them. By putting the customer at the center of all that you do and using data to understand them and meet their needs, your brand can come out even stronger in this new era.
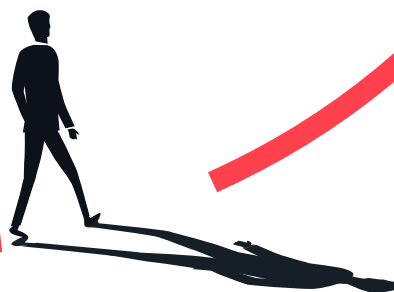
## ABOUT THE RESEARCH

YouGov administered a survey among 6,548 nationally representative consumers across France (998), Germany (2,087), the United Kingdom (2,297) and the United States (1,166). Conducted in January 2023, the purpose of the research was to better understand consumers' views on customer experiences and to identify what influences their purchasing decisions. This data is meant to help brands improve their customer interactions and forge lasting customer relationships through personalized and engaging experiences.

## GET IN TOUCH

Does your business have the right strategy, leadership support and technology to deliver the customer experiences that people want? Learn more about our Experience Transformation solutions or talk to our customer experience experts to conduct a readiness assessment.

https://www.publicissapient.com/solutions/customer-experience-transformation

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