

Welcome to the

# Experience Brand Index

Global consumers demand brands do more than promise a great experience - they expect proof.

Brands make promises every day. They spend billions of dollars on pushing out messages every year — \$628.63 billion in 2018 alone, up 7.4%.<sup>1</sup> But according to our global research on 100 brands, 6,000 consumers and 10 industries, consumers care more about and buy more from brands that deliver proof on the promises they make.

Experience Brands have more than a

**200%**

higher Net Promoter Score (NPS)

Experience Brands boast

**25%**

higher customer loyalty

What surprised us most in our research was that after years of relying on studies about brand messaging and advertising effect, we found that their actions and interactions are a stronger indicator of brand health than anything brands say.

We hope you find this edition of The Experience Brand Index helpful in understanding where the industry stands today and the role of Brand Experience in changing the landscape of tomorrow. As we continue this conversation, we welcome your thoughts, perspectives and questions.

“

**“Brands that back their words with concrete action, like experiences and events, find increased loyalty, higher willingness to recommend and scored significantly higher on Jack Morton’s Experience Brand Index.”**

Josh McCall  
Chairman and CEO  
Jack Morton Worldwide  
[experience@jackmorton.com](mailto:experience@jackmorton.com)



Cadillac



Gillette

amazon

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venmo



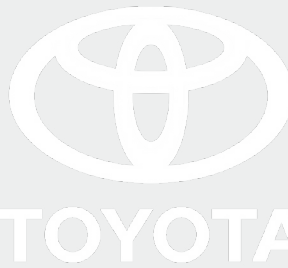
Virgin

VISA

verizon

U.S. Cellular

SAMSUNG



TOYOTA



CVS pharmacy

SONY

Panera BREAD



NORWEGIAN CRUISE LINE

Neutrogena

Sprint

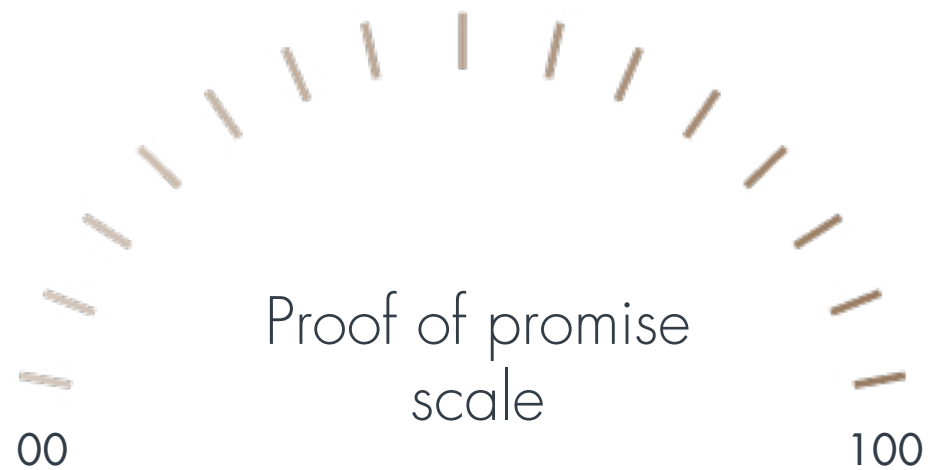
TARGET

T-Mobile

# About the research

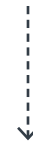
To find out how people feel about their relationships with brands, we conducted a global survey of over 6,000 consumers across all demographics in the US, UK and China. We polled them about more than a dozen facets of their experiences with and perceptions of more than 100 brands across 10 different industries in late Spring 2018.

We also asked them to rate their experiences with specific brands, and built an index that ranked those brands from 1-100 on how well they deliver proof of their promises.



60000

consumers



100

brands



10

industries



## Sample questions

**When I interact with [brand] they give me what I need.**

**[Brand] stands for something different than its competitors.**

**How likely are you to stay loyal to [brand]?**

### Research team

Craig Millon | Executive Vice President • Ben Grossman | SVP, Group Strategy Director • *Principal Investigator* Joe Panepinto | SVP, Strategy Director • Craig Smith | Marketing Director • Erin Winker | Sr. Content Manager • Laura Holmstedt | Digital Marketing Manager • Cait Houck | Sr. Designer



CPG



Beverages



Entertainment



Consumer Tech



Tech



Payments



Travel



Retail



QSR



Retail Banks

Our goal was to gain a better understanding of the state of brands today — including people’s connections to brands — and to identify key elements in creating a successful Experience Brand.

The resulting Experience Brand Index showed that while those at the top (Experience Leaders) were clearly more highly valued by consumers than those at the bottom (Experience Laggards), there’s a great deal of room for improvement across the board.

Throughout this report we’ll present snapshots of cases that reflect the dynamics we’ve uncovered, showing the influence of a brand’s behavior on consumers’ mood, purchase behavior and repeat patronage.

## Experience Brand

*(noun)* \ ex·pe·ri·ence brand \

**Promise + Proof = Experience Brand.** A product, service or organization that creates desire and demand, through its actions and interactions, by harmonizing the proof it delivers with the promises it promotes.

## Brand Experience

*(verb)* \ brand ex·pe·ri·ence \

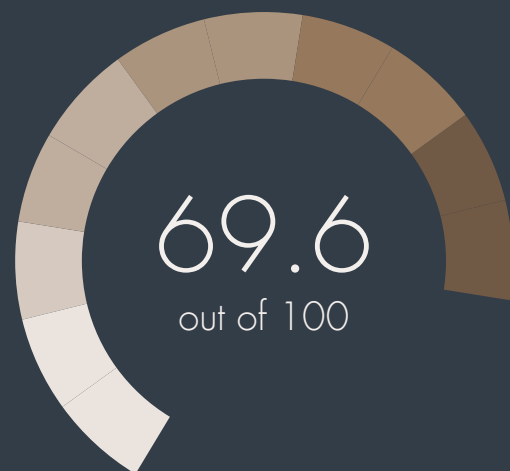
**The Proof.** The notable actions and interactions that connects consumers with a brand (e.g. employee service, web & mobile, social content, online and in-store shopping, and events & experiences) and delivers on its promises.

# Winning the Experience Brand battleground

Only 1 in 4 brands stands out to consumers. Are you the 1 or the other 3?

Consumers globally told us only one in four brands stands out from competitors. When we factored in six dimensions of brand proof (the actions and interactions brands deliver) and brand promise (the potency of the expectations brands set), the overall average Experience Brand Index was a mediocre 69.6.

Overall average Brand Experience Index



The Experience Brand Index is made up of a 100-point scale, covering major drivers of the experiences people have with brands including in-store, employee interactions, mobile, experiential, social, content and online shopping. Survey participants were asked general questions about brands, and then a series of specific questions about brands they interacted with in the last six months.

Some of these questions focused on brand promise, the commitments brands make and expectations they set with consumers. Other questions focused on brand proof, the elements and attributes of the actions brands take and the interactions they have with people. Questions and responses were then interpreted into promise and proof scores and weighted for their importance to brand experience.



“

**“Brand experience is the new battleground. And as brands jockey forward, leaders will focus on brand proof that makes them stand out – something only one in four brands do today.”**

Ben Grossman  
SVP, Group Strategy Director

# Five lessons

## in brand promise & proof

Quickly, it became abundantly clear – brands must deliver on their promises if they hope to attract and retain today’s consumers. To help guide brands in delivering the best consumer experience, we’ve broken down what we learned in greater detail.

**01**

### **Brand proof matters**

It’s a stronger indicator of brand health than brand promises.

**02**

### **Brand integrity is delicate**

Customers will abandon your brand if you don’t live up to your promises.

**03**

### **Brand touchpoints are proofpoints**

Every interaction matters.

**04**

### **Brand promises fall short on delivery**

Consumers see most brands as equally poor when it comes to experience - scoring a “D” in keeping their promises.

**05**

### **Brand proof is only going to get more important**

Changing generational tides give new focus for brand owners.

# 01

## Lesson 01

### Brand proof matters.

It's a stronger indicator of brand health than brand promises.

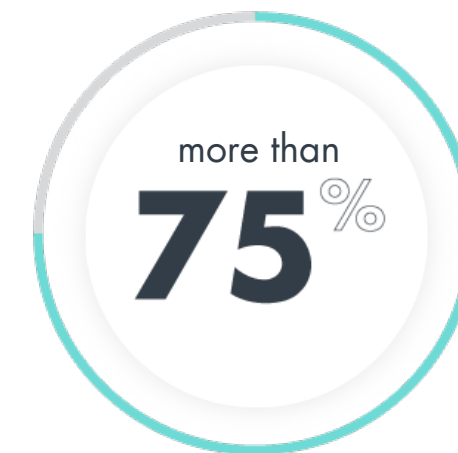
Consumers are very concerned with the way brands behave in the world. And they see the importance of their actions going well beyond simply how brands interact with their consumer base.

More than 75% of global consumers agree with the statement: "I care about how brands behave toward customers, employees and their communities." Consumers in China had the strongest feelings about this, with 83% of respondents agreeing.

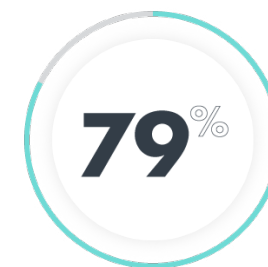
And our research showed that consumers don't just care about the way brands act – they vote with their wallets, rewarding those who deliver the best brand experience.



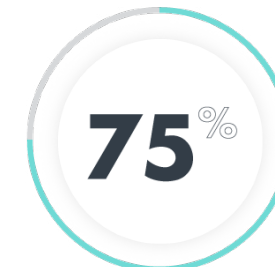
**I care about how brands behave toward customers, employees and their communities.**



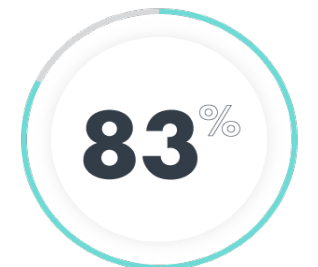
of consumers globally agree



of US consumers agree



of UK consumers agree



of Chinese consumers agree

## Experience Brands deliver more than 200% higher NPS

More than 80% of people trust brand recommendations from a friend or family member over what they see a brand advertise.<sup>2</sup> And companies that are NPS leaders, on average, grow more than two times faster than their peers.<sup>3</sup> This is huge. Especially given that consumers tell significantly more people about bad experiences than good ones.<sup>4</sup>

Therein lies the importance of NPS – an industry benchmark, single question, that allows brands to measure the likelihood of consumers recommending them to others. NPS is key for brands to understand how their customers perceive them overall and evaluate their loyalty. And alongside measuring other touchpoints in a customer's journey, it can tell a brand a lot about overall brand experience.

Brands that scored highly on our Experience Brand Index have more than a 200% greater NPS than low scorers.

more than  
**80%**

of people trust brand recommendations from a friend or family member

**5 to 25**

times more expensive to acquire a new customer

more than a  
**200%**

higher NPS than low scorers

yielded a  
**25%**

higher likelihood for customers to remain loyal

## Experience Brands deliver 25% more loyalty

The importance of brand loyalty almost goes without saying. Why? It's less costly for a brand to keep an existing customer than attract a new one. Depending on the industry, it can be anywhere from five to 25 times more expensive to acquire a new customer.<sup>5</sup>

So while it's great to gain new customers, keeping the ones you already have impacts your bottom line... for the better.

### Existing customers

- Are likely to refer your brand, fostering new customers
- May pay more for your products and services
- Can decrease your operating service costs over time

The solution is easy right? In theory, yes. Deliver on what your brand promotes and keep your customers happy. In return, they'll keep coming back and share how great your brand is.



# 02

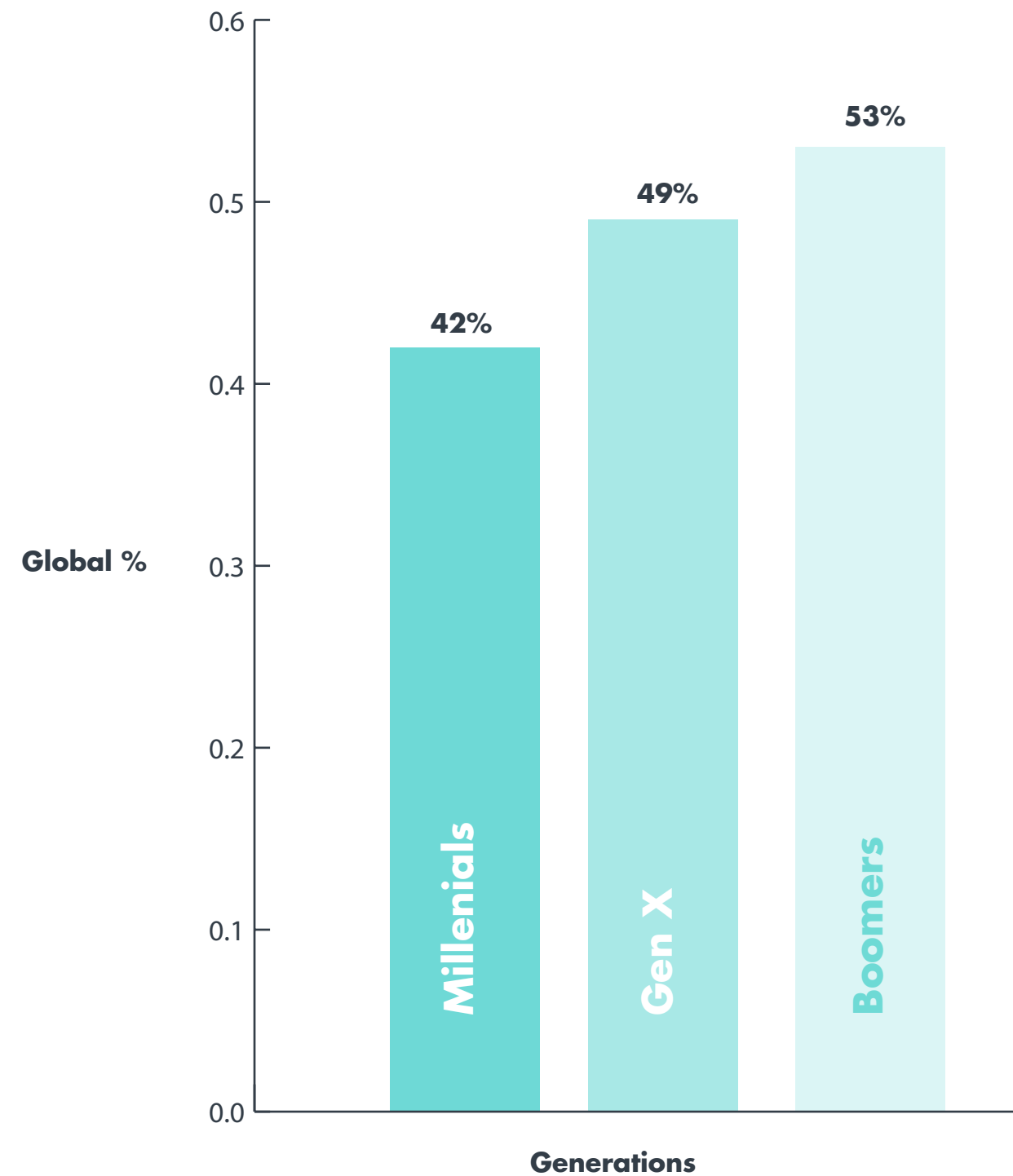
## Lesson 02

### Brand integrity is delicate.

Customers will abandon your brand if you don't live up to your promises.

Consumers are unforgiving when a brand does not live up to the promises it makes. Nearly half of consumers in every region we surveyed agree that if a brand doesn't live up to the image it promotes through its marketing, "It makes me feel I can't trust this brand and won't buy it anymore." Older consumers are more unforgiving (53%); younger consumers more forgiving (Millennials 42%).

**"When a brand doesn't live up to its promises, I can't trust it and won't buy it anymore."**



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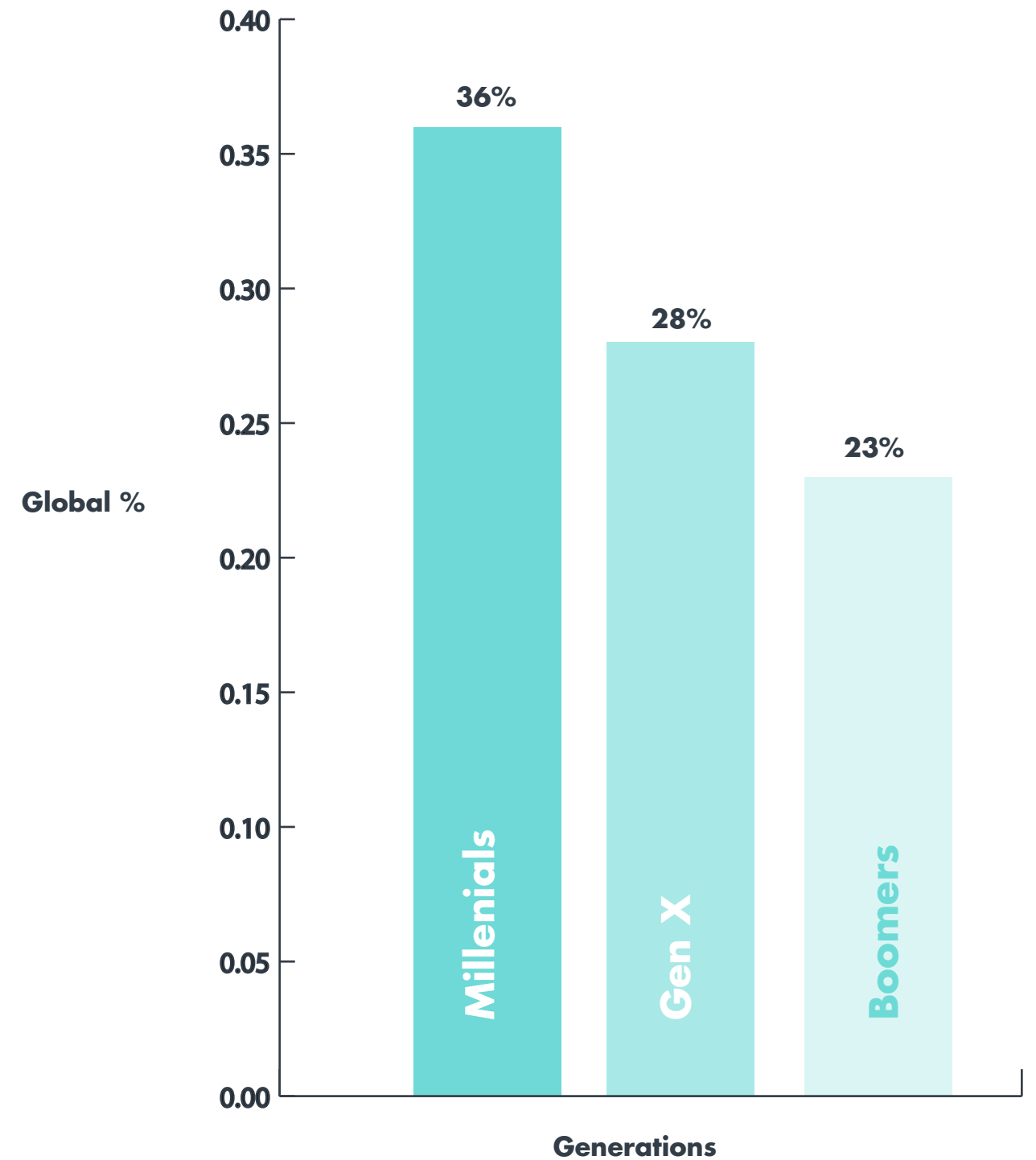
## Cross-generational brand skepticism

Consumers today are doubtful. One out of three of all our global respondents saw overpromising as just what brands do. Generationally, Millennials felt the strongest about brands overpromising, with 36% of them saying that “when a brand doesn’t live up to its promises, it wants me to believe it’s something it’s not.” That’s especially true in the US and UK where 40% of Millennials felt that way.

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The bottom line? Consumers want the brands they know and love to treat them well. And they’re unforgiving when a brand doesn’t keep its promises. After all, this is a relationship we’re talking about. So for it to be a long-standing one, brands must continually nurture their customers and above all, deliver experiences that meet and exceed the promises they make.

“When a brand doesn’t live up to its promises, it wants me to believe it’s something that it’s not.”



# 03

## Lesson 03

# Brand touchpoints are proofpoints.

Every interaction matters.

When we look at the most successful Experience Brands in each category, they deliver consistently across all interactions with consumers and actions in the world. In other words, there's no excelling in one area of the brand experience that can make up for shortcomings in others.

### Proofpoint:

(noun) \ prüf point \

An action or interaction facilitated by a brand to deliver on its expected promises set with the people it serves – a critical part of a holistic brand experience.

And while consistency across every proofpoint is important, some industries do better than others in several key categories of brand experience:



Employees



In-store



Web & mobile



Online shopping



Social content





















Events & experiences

# Making it emotional, not just functional

Top-performing Experience Brands are rethinking their touchpoints as “proofpoints” – opportunities to deliver that much needed tangible proof on their brand promise. And while, for years, brands have thought about touchpoint mapping, the reality is that often times that exercise becomes highly functional and not nearly emotional enough.

## Top-rated brands by proofpoints and geography

Proofpoint	US	UK	China
Employees			
In-store			
Web & mobile			
Online shopping			
Social content			
Events & experiences			

# 04

Lesson 04

## Brand promises fall short on delivery.

Consumers see most brands as equally poor when it comes to experience - scoring a "D" in keeping their promises.

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More than 50% of consumers globally agree that brands rarely live up to their promises. In China this number is even higher, with 60% of respondents agreeing that brands generally fall short of their expectations.



## Brands rarely live up to promises



of consumers globally agree



of respondents in China agree with this statement

# Looking for something different

Less than one in four consumers said the brands they interact with deliver experiences that are significantly better than their competitors. But Experience Brands were different. Globally, brands that scored high within our Experience Brand Index are nearly two times as likely to deliver what consumers see as a superior brand experience. And they are also nearly two times as likely to be deemed worth talking about, unlocking sought after online and offline word-of-mouth.



**And while certain trends hold true globally, there are also key geographical and industry differences in rating the importance of proofpoints:**

## **Employee experience critical to US/UK:**

In the US and UK, the experience consumers have with employees is among the most important – in the US for 10/10 industries we looked at and in the UK for 8/10; in China, employee experiences are top proofpoint drivers for just 2/10 industries (Retail Banks and Travel).








































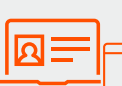











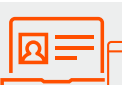






































## **Web and mobile experiences are important to all:**

For 8/10 industries in the US and UK, and 6/10 in China, web and mobile experiences are significant drivers.

## **Social content has highest impact in China:**

Social content was a key proofpoint in China for 9/10 industries (exception: Beverages).

**When we look at the most successful brands in each industry, they deliver consistently across all proofpoints. However, there are some experiences more closely tied to their success.**

Industry	USA	UK	China
<b>CPG</b>	  	  	  
<b>Beverages</b>	  	  	  
<b>Entertainment</b>	  	  	  
<b>Consumer Tech</b>	  	  	  
<b>Tech</b>	  	  	  
<b>Payments</b>	  	  	  
<b>Travel</b>	  	  	  
<b>Retail</b>	  	  	  
<b>QSR</b>	  	  	  
<b>Retail Banks</b>	  	  	  

**Key**



Employees



In-store



Social content



Online shopping



Events & experience



Web & mobile

# Best Experience Brands

Across all proofpoints, Amazon, Netflix and Royal Caribbean ranked #1 in the US, UK and China, respectively.

## Top five leaders per geography

Rank	USA		UK		China	
1	Amazon	78.8	Netflix	74.4	Royal Caribbean	78
2	JetBlue	74.3	Apple	72.2	Huawei	77.5
3	Royal Caribbean	73.5	PayPal	70.6	Blizzard Entertainment	77.3
4	Samsung	73.2	Sony	70.6	Alipay	77.3
5	PayPal	73.2	Samsung & IKEA	70	SK-II & Singapore Air	76.7



### PayPal – Top Experience Brand

Throughout PayPal’s 20-year brand journey – which included an acquisition by eCommerce giant, eBay – they have never deviated from their core promise: “We put our customers at the center of everything we do.” For PayPal, customers exist on both sides of a transaction – business and purchaser. A significant effort goes into backing up their promise, like constantly working to improve and simplify the consumer’s

transaction process. Notably, they implemented a new streamlined payment dispute service, and purchased Venmo, an innovative peer-to-peer payment service company, showing added value to their customers. PayPal is a brand that truly backs up their promises with strong, impactful customer experiences, servicing its 244 million active account holders.<sup>6</sup>



## Brands to watch

Ranking within the top 10 of our Experience Brand Index, the following brands are ones to keep an eye on.

### The next five leaders per geography

Rank	USA		UK		China	
6	Sony	72.8	eBay	68.9	WeChat	76.5
7	YouTube	72.3	Amazon	68.6	Macy's	76.4
8	Neutrogena	72.1	American Express	67.7	Heineken	76.1
9	IKEA	71.8	TUI	67.2	Xiaomi	76
10	Apple	71.6	P&O Cruises	66.8	Starbucks	76

### WeChat – Brand to watch



Relative to many of the brands we included in this survey, WeChat is quite young. Launched in 2011 by the technological behemoth Tencent, WeChat (called Weixin in China) entered the Chinese social media market that was dominated by the well-established RenRen. But quickly, they gained traction due to their ever-evolving platform. They were an early-adopter of the mobile-first mindset, placing the mobile user at the center of everything, and constantly adding new services and features. WeChat has combined a healthy mix of embracing what's worked on other platforms

with their own unique features to create a multi-faceted mobile platform which encourages users to spend significant amounts of their daytime within its app ecosystem. A reported average of 66 minutes a day was spent within the platform in 2016.<sup>7</sup> As WeChat surpasses a billion users and continues to evolve and innovate, we'll keep a close eye on their consumer relationship and expect to see them climbing our Experience Brand Index in the future.

# 05

## Lesson 05

### **Brand proof is only going to get more important.**

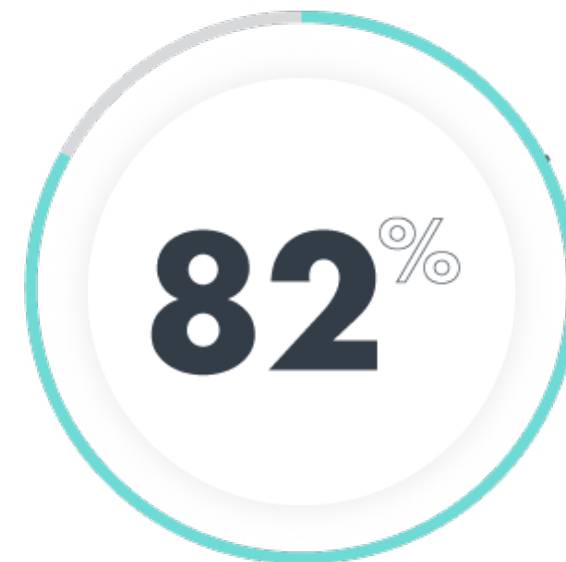
Changing generational tides give new focus for brand owners.

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It's no secret that the consumer base around the world is changing: More diverse, more global, different demographic swings, the rise of Millennials and Gen Z. Our research makes it clear that the playbook of yesteryear will no longer succeed with consumers of the future.

#### **Simply put:**

Millennials care more about how brands behave but are more skeptical than previous generations.



globally care about how brands behave toward customers, employees and their communities.



globally believe brands rarely live up to their promises.

For brands living up to their messaging, there's less of a hurdle to jump. They are already seeing increased loyalty and their customers are more likely to recommend them to family and friends.

And while the primary focus of our research was B2C brands, our attitudinal data suggests that this notion holds true for all brands, including B2B, as Millennials are increasingly becoming influencers and decision-makers within their companies.

	Global	Millenials	Gen X	Boomers
I care about how brands behave toward customers, employees and their communities	<b>79%</b>	<b>82%</b>	<b>78%</b>	<b>78%</b>
US	<b>79%</b>	<b>81%</b>	<b>79%</b>	<b>77%</b>
UK	<b>75%</b>	<b>77%</b>	<b>74%</b>	<b>74%</b>
CH	<b>83%</b>	<b>88%</b>	<b>80%</b>	<b>82%</b>
Brands today rarely live up to the promises they make	<b>52%</b>	<b>56%</b>	<b>50%</b>	<b>47%</b>
US	<b>45%</b>	<b>49%</b>	<b>44%</b>	<b>42%</b>
UK	<b>50%</b>	<b>55%</b>	<b>49%</b>	<b>49%</b>
CH	<b>60%</b>	<b>63%</b>	<b>58%</b>	<b>50%</b>

# Habits of Experience Brands

From digital to in-store experiences, from employees to events, let's take a deeper look at a few brands who shine across customer proofpoints.

## Employees

With a brand mission to save the world from mediocre coffee, Costa Coffee believes every one of their baristas is unique in what they do. So much that each year, to celebrate their creativity and passion for the bean, the brand launches a Barista of the Year competition. For the coffee enthusiasts who participate, they are given the opportunity to showcase their espresso and latte-making skills – including one specialty drink made up of their own ingredients – for judges to critique their skills and creativity. Costa believes in recognizing the incredible coffee-making talent of their baristas and fostering a standard of excellence across their company. They also appear to have a lot of fun in the process!



## In-store

With their customers at the core of their brand vision – “to create a better everyday life for the many people” – IKEA delivers a shopping experience that's grounded in consumer research to better understand *life at home*, affordable and uniquely enjoyable. Last year, the largest furniture retailer reported 2.3 billion visits to their company website and 936 million store visits.<sup>8</sup> And the reason why is obvious. In any one of their 400 stores, IKEA customers are delighted with a walk through showroom displays of furniture and décor that's both inspirational and functional. They also pass by a playroom full of kids having fun and see shoppers enjoying Swedish fare in the store restaurant. Thanks, IKEA, for consistently delivering on a great furniture shopping experience.



# Habits of Experience Brands

From digital to in-store experiences, from employees to events, let's take a deeper look at a few brands who shine across customer proofpoints.

## Web & mobile

Amazon, the second most valuable company in the world, began their journey over 20 years ago by selling books online.<sup>9</sup> Today, Amazon has become the world's largest online retailer whose brand mission is rooted in being "consumer obsessed." And it's working. With a culture that continuously innovates and anticipates what their customers want – to earn and keep their trust – they've created a purchasing model that caters to their more than 300 million consumers. You can now shop online from your home, on-the-go with your mobile device, via 1-Click ordering, or by asking Alexa. Amazon has truly made consumer purchasing more seamless, more personalized and simpler. We're excited about what's to come.



## Online shopping

With 51.3% of the Chinese eCommerce market, Tmall has been a revenue-generating powerhouse for parent Alibaba for nearly a decade.<sup>10</sup> A great deal of the website's success can be attributed to their dedication to building an industry-leading online marketplace. Tmall.com not only serves as a convenient ecommerce platform for local Chinese sellers, but they also invite Western retailers, including US eCommerce giant Amazon, to sell goods to their massive user base, which is comprised of hundreds of millions of consumers.



# Habits of Experience Brands

From digital to in-store experiences, from employees to events, let's take a deeper look at a few brands who shine across customer proofpoints.

## Social content

Visa, a US-based brand, has made inroads in the massive Chinese payments market by partnering with a number of domestic companies including Tencent and Alibaba, having integrated into the digital giants' popular WeChat Pay and Alipay social payment platforms. They also pay a significant amount of attention to building and maintaining strong communities on a number of social networks most closely associated with China: WeChat, Sina Weibo and Youku. Visa's efforts and dedication to creating a social connection with the people of China has made them a player in the Chinese payment card market and a challenger to the powerful UnionPay in the space.



## Events & experiences

Royal Caribbean continually invests in events and experiences, onboard and off, for their consumers, employees, trade publications and the press, to give them a taste of the amenities they promise to their cruisers. With their *Sea Beyond* experience, they proved to the world that they are an innovative visionary in the travel industry by inviting their audience to experience the new, next and never seen before – where they could see, feel and interact with innovations firsthand. With their launch of the *Bionic Bar*, Royal pushed innovation further by introducing the world's first robotic bartenders to its cruise-goers. The robots, whose limbs can produce two drinks per minute, shake up and muddle over 30 different cocktails. Royal also launched *HoliDeck*, a virtual reality experience that provided cruisers with off-boat activities, such as skydiving and rock climbing, without leaving the cruise ship.



# The Experience Brand Checklist

## Wondering if your brand delivers proof on its promise?

Is your brand's mission and promise felt by people? Have you thought about this recently?

If not, take a few minutes to answer these six questions:

01

### What's your promise?

Can you state your brand promise in 2-3 sentences?

(We encourage you to write it down – even pin it to your cubicle wall.)

02

### Do you prove it through actions?

Can you point to 3-4 notable actions your brand has taken to prove to the world your promise is authentically proven?

03

### Do you prove it through interactions?

What key consumer experiences across consumer touchpoints — customer service, in-store, web, mobile, content, experiential — deliver proof on your promise?

04

### Is your experience differentiated?

Do you provide a brand experience that's significantly different than your competitors?

05

### Do you make it moving?

In the Brand Experience landscape, it's easy to simply deliver an action or interaction that works. But is the proof you're delivering on your promise something that people are emotionally engaged by? Do they feel proud of it? Are they inspired by it? Or are they bonded to it?

06

### What's worth talking about?

If a consumer were going to convince a skeptical friend that your brand is worthwhile, what's one action or interaction they would use to explain their attachment to your brand?

If you're still skeptical about whether consumers would agree with your brand's internal assessment of itself, reach out to become part of the Experience Brand Index.

[experience@jackmorton.com](mailto:experience@jackmorton.com)

# About Jack Morton

## Request a consultation

If your organization would like to learn more about the Experience Brand Index or what Brand Experience can do for your brand, get in touch:  
617.585.7000  
experience@jackmorton.com

## About Jack Morton

Jack Morton is an award-winning global brand experience agency. We're driven by the fact that the world's most successful brands deliver proof on their brand promise at every touchpoint. It's what inspires our team each day to help clients "Do something extraordinary."

For almost 80 years, we've strengthened the relationships between brands and the people who matter most to them, through events and experiential, integrated campaigns, digital and content, sponsorship marketing and employee engagement. Jack Morton is part of the Interpublic Group of Companies, Inc. (NYSE: IPG). More information is available at [www.jackmorton.com](http://www.jackmorton.com).

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