

HAVAS CX

X INDEX

U.S. 2024

GOING BEYOND EXPECTATIONS



Havas CX brings together creativity and capability to transform brands and create meaningful experiences that deliver value for people and businesses.

WHO IS HAVAS CX?

OUR GLOBAL NETWORK

Brings award-winning expertise in digital & business transformation, product & service innovation, experience ecosystems, and membership & loyalty.

Harnesses and optimizes the power of data, technology, design, and AI to deliver creative, efficient & effective solutions.

HAVAS CX

1,800+ PEOPLE

19 COUNTRIES

WE BELIEVE

We are not just serving customers, we are **servicing people.**

Human-centered experiences can make people's lives better.

Brands must deliver the promises they communicate **through experiences.**

WHY CX?

**96% OF
CUSTOMERS SAY
THAT CX IS A
VITAL FACTOR FOR
BRAND LOYALTY.**

Which can lead to 10–15% increase in revenue and customers paying up to 16% more for products.

Source: Zippia, 2023

GETTING CUSTOMER EXPERIENCE WRONG HAS MASSIVE CONSEQUENCES

\$2.5T

is lost in retail and brand sales globally due to poor customer experience.

48%

of consumers perceive a decline in purchasing power while making trade-offs due to financial constraints.

59%

of consumers, on average, say they have already stopped buying a brand because of a single negative experience.

MEANINGFUL BRANDS DELIVER MEANINGFUL EXPERIENCES

Understanding the end-to-end customer experience is becoming the single most powerful driver for modern marketing organizations.

**“CX IS NO LONGER
JUST A DISCIPLINE:
IT IS THE BASIC
INGREDIENT FOR
GROWTH.”**

— Forrester



WE CREATE IMPACTFUL EXPERIENCES

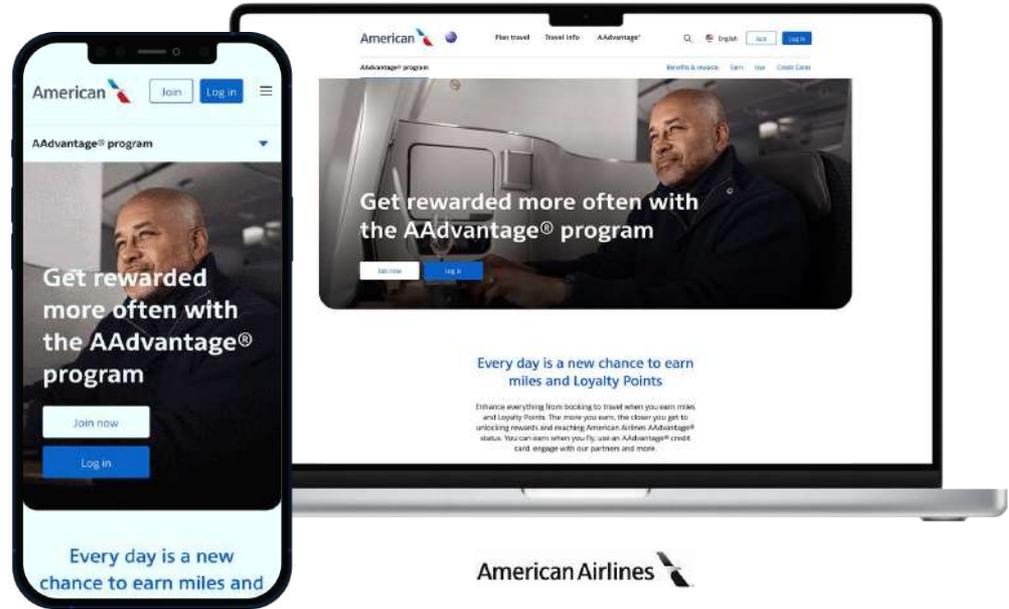
that transform how our clients
connect with the world.

WHAT WE DO

Deliver brand consistency on every touchpoint
so you show up the same, everywhere you show up.

Make the internet fun again; build **nice things**
for nice people.

Spark **long-term relationships**; measure
everything.



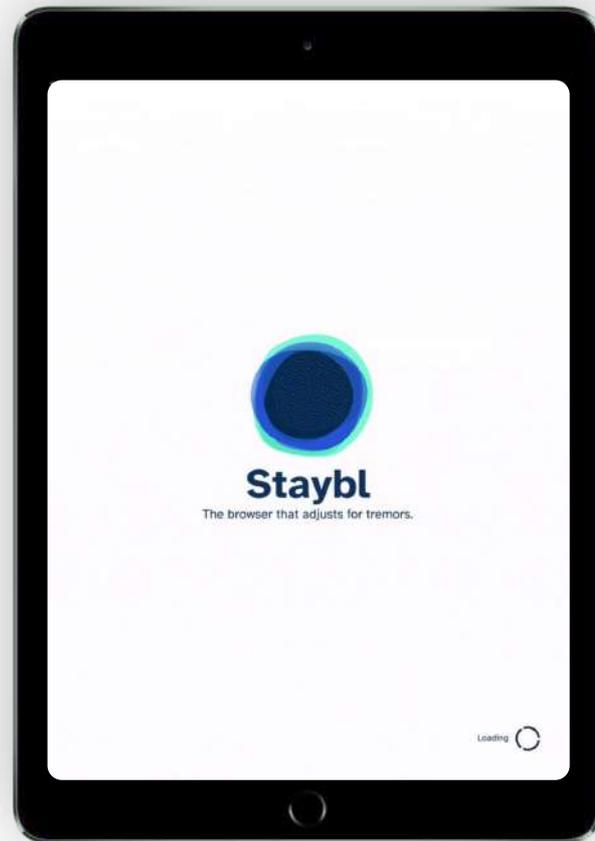
American Airlines 

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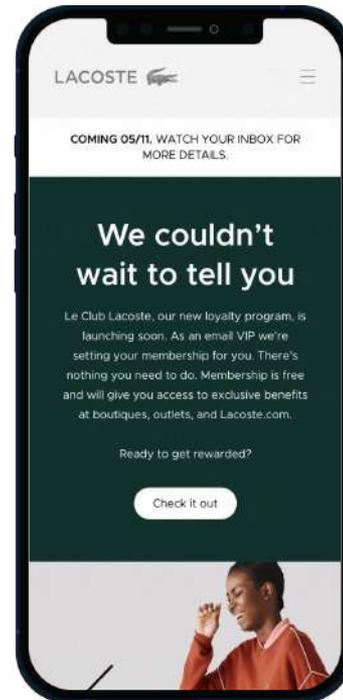
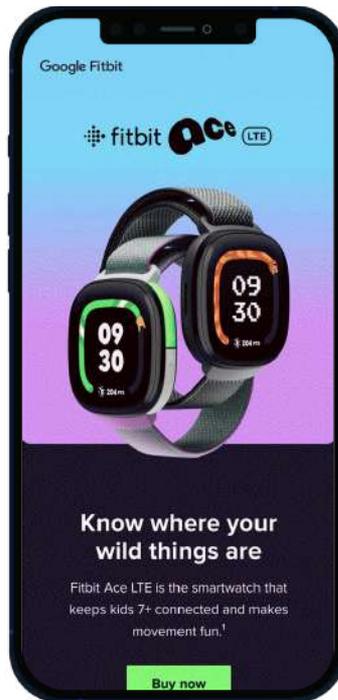
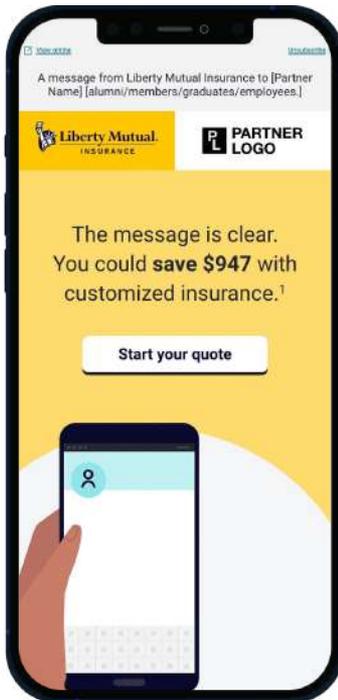


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Businesses must adopt a holistic “trifecta” approach that combines

- ① **Functionality**
- ② **Emotional Engagement**
- ③ **Going Above & Beyond Expectations**

Brands that can build up these three key elements will be the winners in CX. This report will dive deeper on these findings from our 6th annual X INDEX survey.

THE TRIFECTA FOR A WINNING CX

HAVAS

X INDEX

A GLOBAL CX STUDY



9 MARKETS
55,000 PEOPLE
525 BRANDS

Customers who made at least 1 purchase with the brand in the last 6 months.

WHAT WE MEASURE

We invited customers to rate each of the 23 discriminating factors 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 to the **emotional** & from the **personal** to the **collective**.

COLLECTIVE

The brand demonstrates it cares about its impact on the planet.

The online & 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.

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 & engaging.

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

The experience with this brand is enjoyable & 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 as personalized to my needs.

The brand respects my privacy & my personal data.

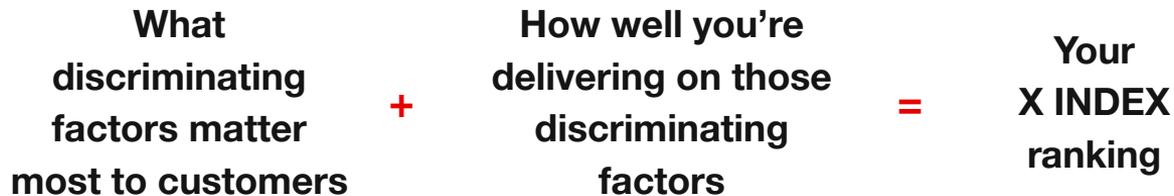
The brand takes my advice & feedback into account.

The brand acknowledges & rewards my loyalty well.

This brand provides great value when I provide my data.

HOW WE MEASURE

Once we capture the respondent data, we apply a model of hierarchical linear regression to determine which are the most discriminating factors of the experience, and we rank each brand according to its score, creating the X INDEX.



- The model identifies the top factors (out of the original 23) for a great customer experience. We build separate models for two types of retailers: those with both physical stores and online shops (bricks & clicks) and those only selling online (pure players). We use a mixed effects model to see the impact of different sectors and brands on customer satisfaction.
- That's where the hierarchical linear regression comes in. We find the top 10 factors for customer experience and rank the brands based on their overall scores.
- Does your brand go the extra mile to delight your customers?

Automotive

Audi
BMW
Chirey
Citroen
Dacia
General Motors
Hyundai
Kia
Mercedes Benz
MG
Nissan
Peugeot
Polestar
Renault
Seat
Skoda
Tesla
Toyota
Volkswagen
Volvo

Banking

Banca March
Banco Galicia
Bankinter
Banorte
Barclays
BBVA
Bizum
Citi Banamex
Credit Agricole
Credit Mutuel
Eyo
Halifax
HSBC
ING
Lloyds
Macro
N26
Nu Bank
Revolut
Santander
Soci t  G n rale

Beauty/Health

Aesop
Avon
Boots
Dermaglos
Holland & Barratt
L'Oreal
Marionnaud
Natura
Nocibe
Sephora
Superdrug
Yves Rocher

Energy/Utilities

BP
Cepsa
Endesa
Holaluz
Iberorola
Naturgy
Repsol
Shell
Total Energy

E-retail

Amazon
C Discount
Glovo
La Redoute
Le Bon Coin
Mercado Libre
Pedidos Ya
Rappi
Shein
Vinted
Wallapop

Fashion/Lux

ASOS
H&M
Lacoste
Massimo Dutti
Primark
River Island
Shein
The White Company
Zara

Fashion/Sport

Adidas
Decathlon
Go Sport
New Balance
Nike
Sport
Puma
Vans

Financial Services

Mercado Pago
Paypal
Revolut
Uala

Home

Easy
Gaia
IKEA
Leroy Merlin
Maisons du Monde
Manomano
The Home Depot
West Wing

Hospitality

Airbnb
Booking.com
Club Med
Melia
NH Hotels
RIU

Insurance

Aviva
Compare the Market
Linea Directa
Mapfre
Mijtua Madrilena
MoneySuperMarket
Pelavo Seguros
Santalucia
Securitas Direct
Verti

Leisure/Entertainment

Amazon Prime Video
Apple TV
Canal+ / My Canal
Disney+
Disneyland Paris
Futuroscope
HBO Max
Movistar Plus
Netflix
Parc Asterix
Spotify
Star+
Vix

Mobility/Travel

AeroMexico
Air Europa
Air France
ALSA
Al Mundo
Avanti
Blablacar
British Airways
Buquebus

Cabify
Despegar
Didi
Europcar
Eurostar
Fly Bondi
GWR
Hertz
Iberia
Iryo
Ouigo
Renfe
RyanAir
Sixt Sncf Connect
TGV Inoui
Turismo City
Transavia
Uber
Viva Aerobus
Volaris

Petcare

Pets at Home

Quick Service Restaurant

Burger King
Cielito Querido
Costa
Dominos
KFC
Little Caesars
McDonalds
Mostaza
Starbucks

Retail

Alcampo
ALDI
Argos
ASDA
Carrefour
Chedraui
Coppel
Coto
Disco
El Corte Ingles
Galerias Lafayette
Go Outdoors
John Lewis
Jumbo
LIDL
Liverpool
Mercadona
Palacio del Herro
Picard
Printemps
Sears
Soriana
Suburbia
Tesco
Vea
Walmart

Services

Correos Express
DHL
English Heritage
GLS
Help for Heroes
La Poste
National Trust
Nectar
Royal British Legion
Seur

Specialized Retailer

Boulanger
Darty
FNAC
Miniso
Office Depot

Tech

Apple
Huawei
LG
Samsung
Sony
XIAOMI

Telecom

AT&T
Digi/Digimobil
Claro
GiffGaff
Jazztel
Low1
Masmovil
Movistar
O2
Orange
Personal
Simyo
Telcel
Telefonica
Tuenti
Vodafone
Voigo

WE HANDPICKED TOP BRANDS ACROSS THE GLOBE

AND IN THE U.S.

Automotive



Beauty



Entertainment & Leisure



Fashion

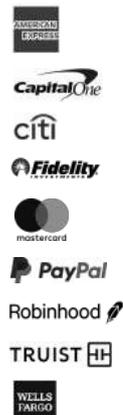


RIMOWA



WARBY PARKER

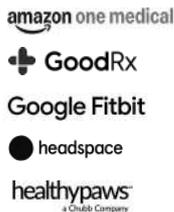
Financial Services



Food & Drink



Health & Wellness



hims



Home



Tech



Telecom



Toys



Transportation



Travel



WHAT MATTERS MOST TO CUSTOMERS

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FUNCTIONAL

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The brand can quickly adapt its shopping experience to external factors.

*top 3 discriminating factors.

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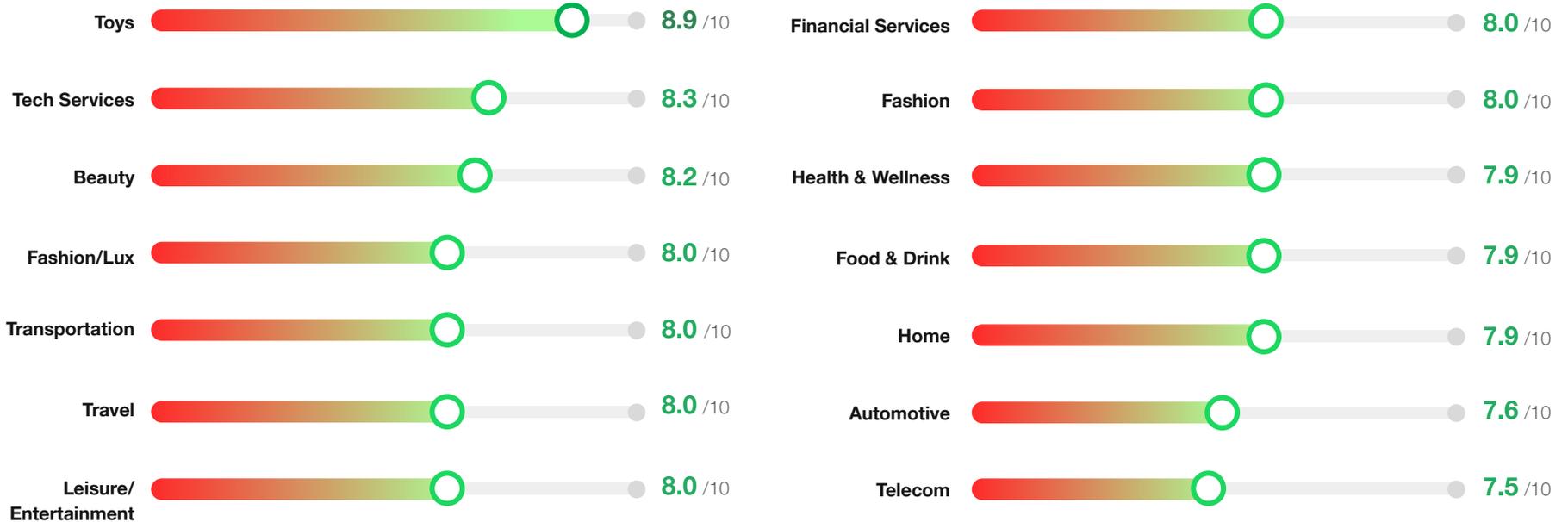
THE HAVAS BAROMETER FOR CUSTOMER EXPERIENCE

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.

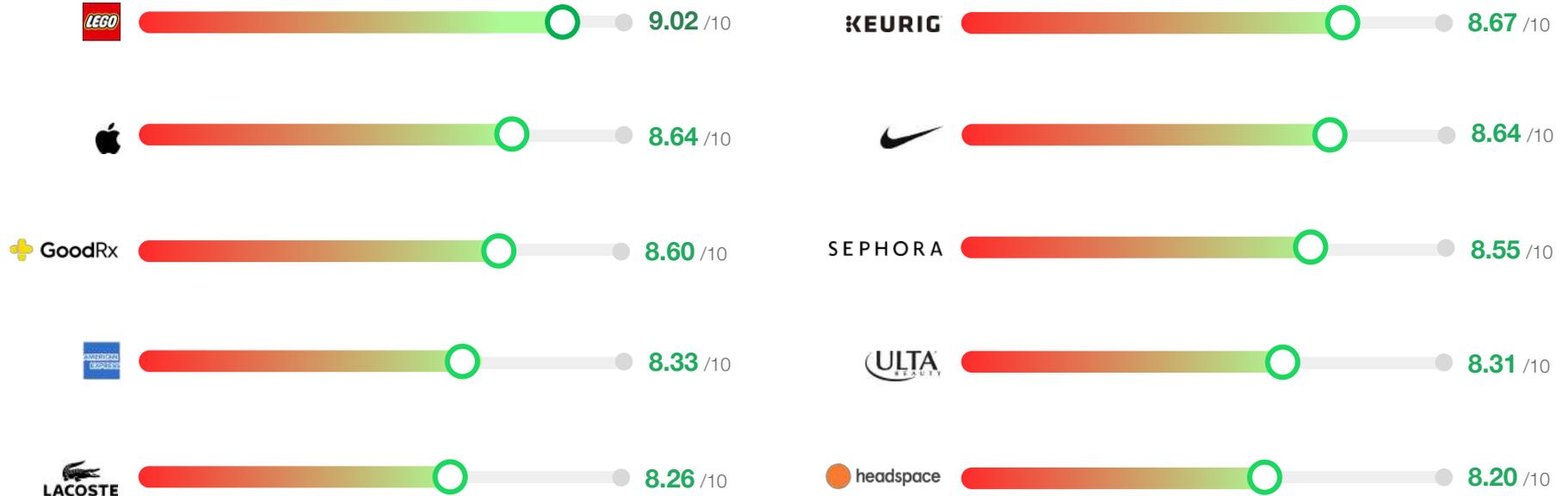


THE U.S. RESULTS

U.S. RANKING BY INDUSTRY



TOP 10 U.S. RANKING BY BRAND



71% of customers feel
the day-to-day effects
of inflation.

Source: Mintel American Lifestyles 2024

**INFLATION
HAS HIT
HARD**

A NEW EQUATION DRIVING VALUE

EFFICIENCY

+

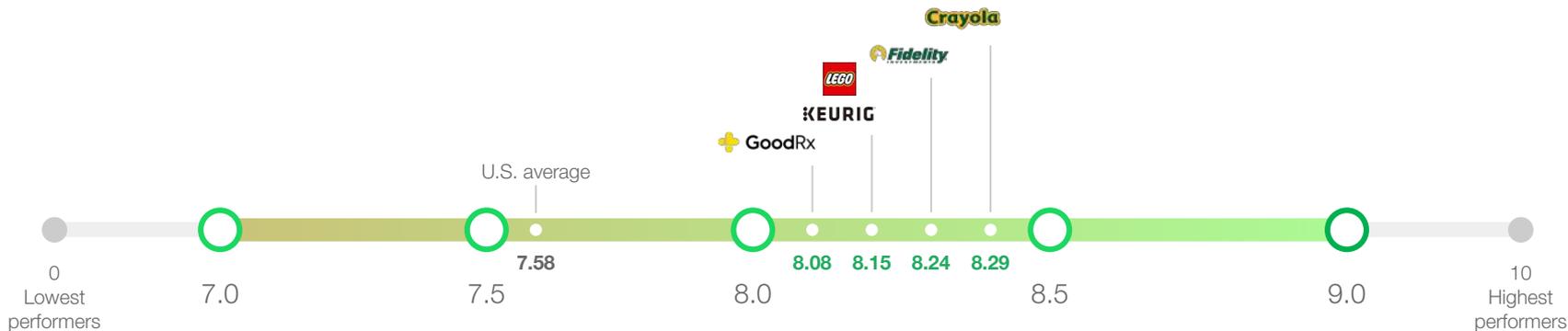
PLEASURE

+

GOING BEYOND

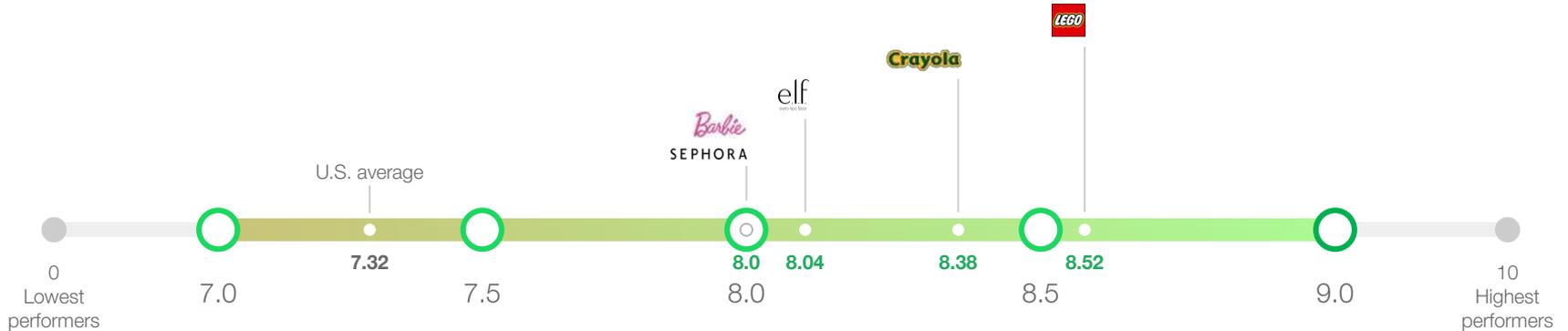
CUSTOMERS CRAVE CONVENIENCE

“I’m not wasting time, it’s efficient.”



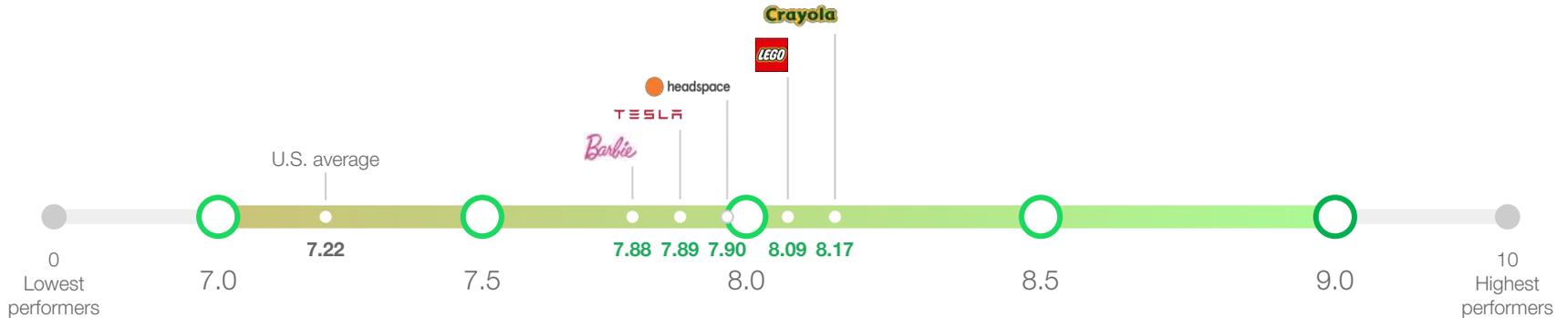
CUSTOMERS SEEK DELIGHTFUL CX, NOT JUST PRODUCTS

“I’m always pleasantly surprised by what the brand has to offer.”



BUT NOW CUSTOMERS EXPECT BRANDS TO GO THE EXTRA MILE

“This brand often goes beyond my expectations.”





**THE REAL
WINNERS WILL
BE THE ONES
WHO ADOPT THE
'CULTURE OF THE
EXTRA MILE.'**

THE MOST REPRESENTED FACTOR AMONG ALL COUNTRIES

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The brand responds to my feedback & rewards my loyalty well.

3 WAYS FOR BRANDS TO GO BEYOND EXPECTATIONS

01 _____

Next-gen
personalization

02 _____

Redefine
norms with tech

03 _____

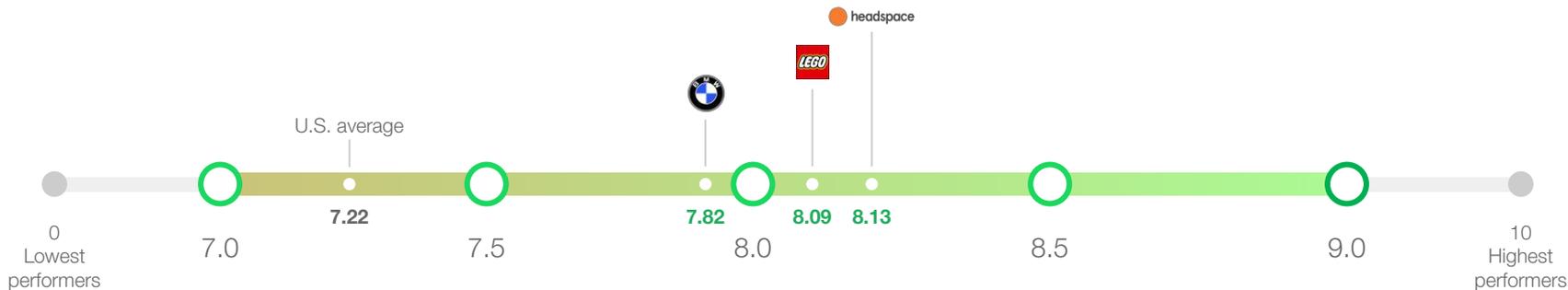
Make data
more rewarding

01 —

NEXT GEN PERSONALIZATION

NEVER UNDERESTIMATE THE TRANSFORMATIVE POWER OF SURPRISE

A delightful surprise can transform the customer journey, sparking a newfound love for the brand.

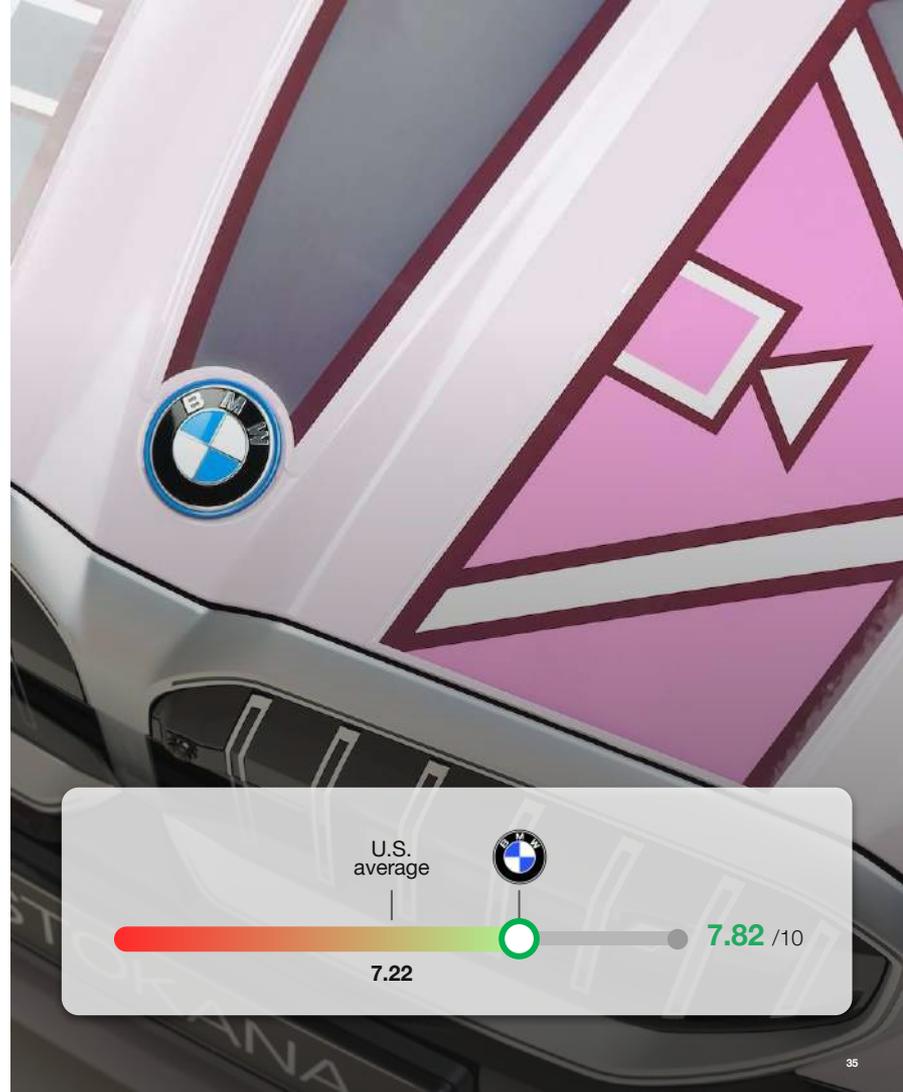


BMW

BMW E Ink technology allows vehicles to change their exterior color dynamically. Showcased with the BMW iX Flow and the BMW i Vision Dee, the tech can display up to 32 different colors.

The latest iteration, the BMW i5 Flow NOSTOKANA, presented at the Frieze Los Angeles art fair in 2024, demonstrates advanced segmentation that allows for intricate animations on the car's surface.

“Drivers can express different facets of their personality... and express it each time they sit in their car.” —*Stella, Clarke, iX Flow project leader*

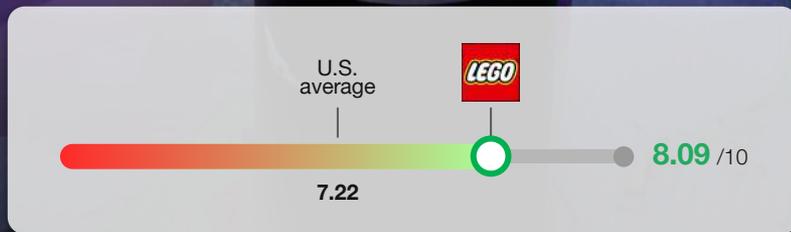
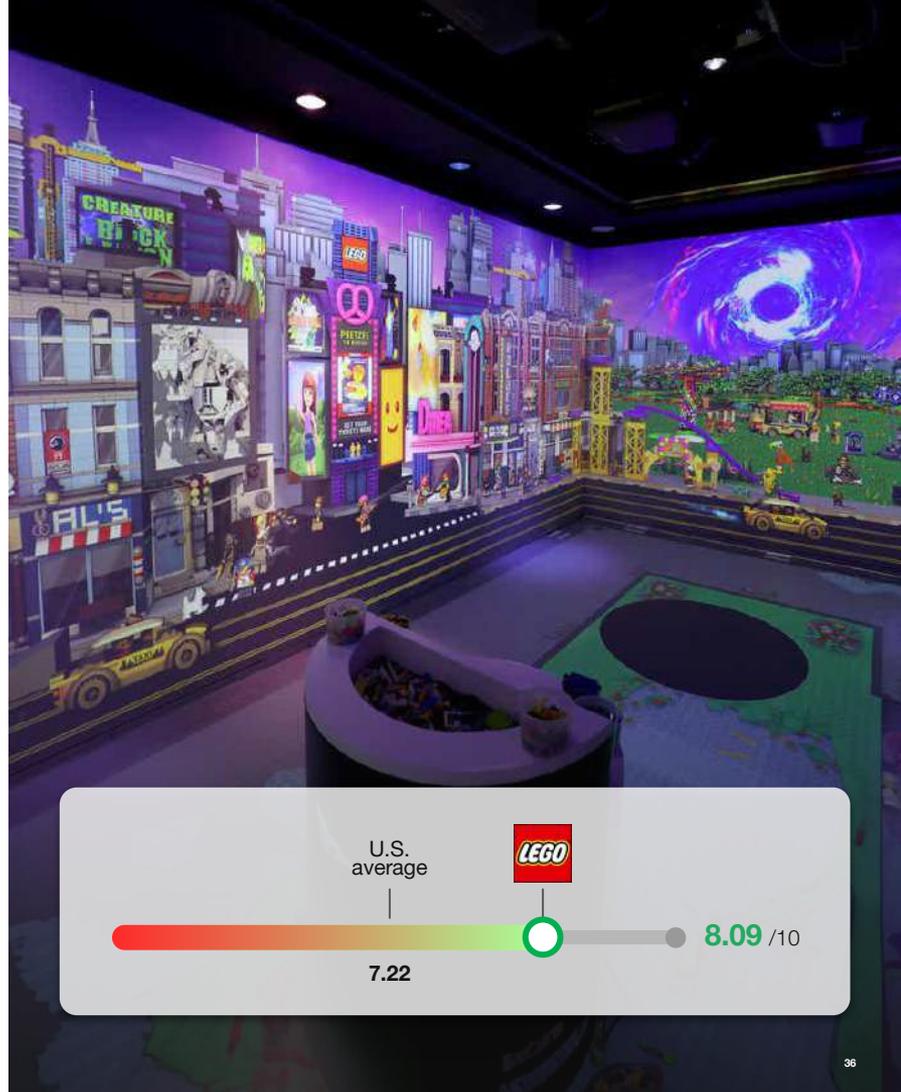


LEGO

LEGO® Brick Lab is an immersive experience bring together the physical and digital worlds. Walk inside and the walls and floors come to life with light, sound and music in a virtual world that “plays” right along with you.

See the wonder unfold as players build their creation, scan it and watch it become a living part of the LEGO® Brick Lab in seconds. Each ticket holder gets a box of bricks to build in the Brick Lab—and then take home. This set will be unique to the LEGO® Brick Lab experience and not found anywhere else in the world.

brothers-brick.com



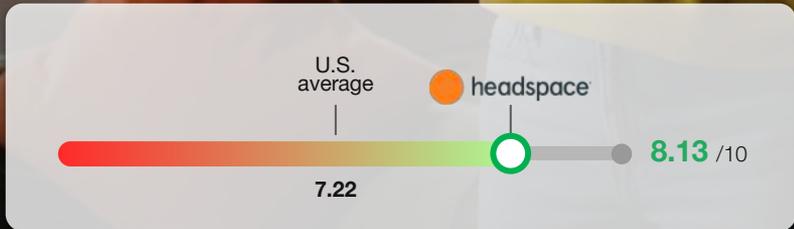
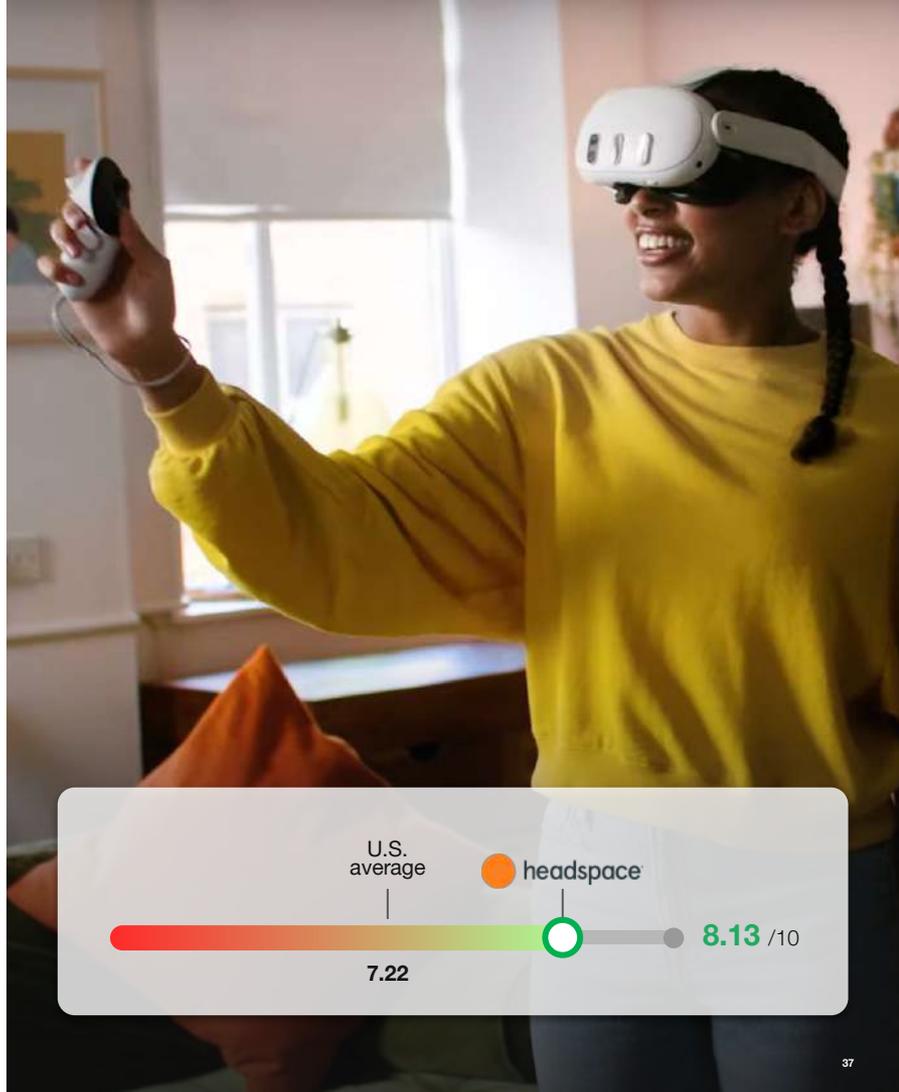
HEADSPACE

Headspace XR lets you to take time for self-care, and the most innovative way to do that is with Headspace XR: a virtual playground for your mind.

Although labeled “extend 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.



instagram.com/hestyreps



02 —

REDEFINE NORMS WITH TECH

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.



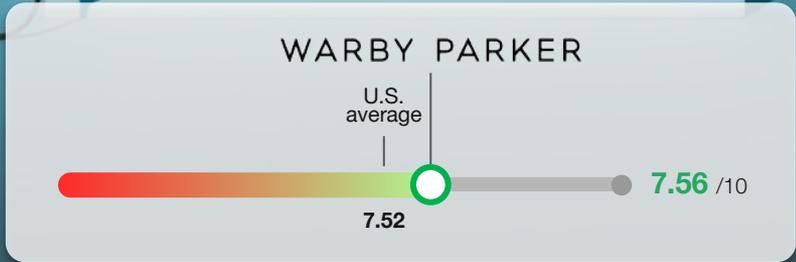
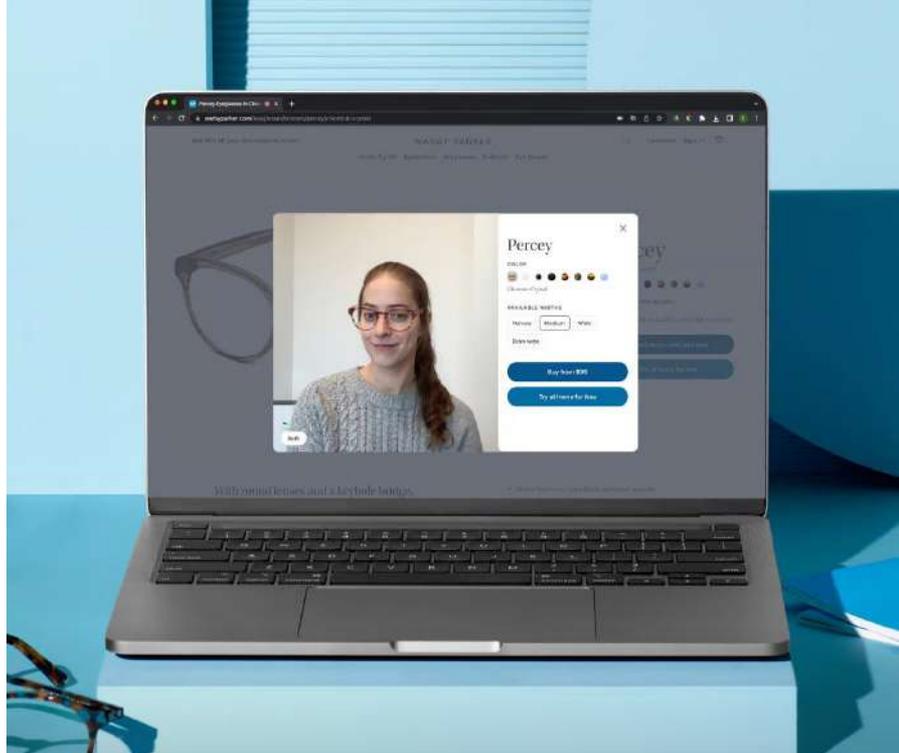
WARBY PARKER

warbyparker.com

Warby Parker disrupted the eyewear category with their digital first approach to buying glasses.

According to Liu, Warby Parker founders weren't tasked with a traditional challenge, but rather motivated themselves to become more convenient than they already were. Potential digital shoppers and new in-store shoppers who weren't familiar with online could vet the quality of their frames without making any sort of commitment.

“Should they choose to refrain from buying in-store, can remember the look and feel of the products as they complete their journey online at a later point,” she explains.

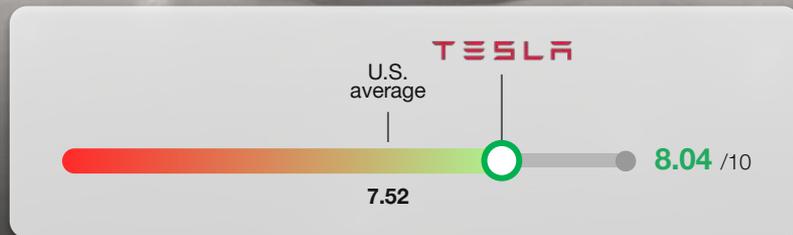


TESLA

Tesla Dealerships have reinvented the category. After taking a test drive, your next step is the vehicle purchase. There is no office to sit down and wait for a salesperson to talk to. And there's no time spent waiting an eternity for him to get the manager to haggle over pricing. You simply go to Tesla.com, click the model you'd like to buy, configure your vehicle, and place your deposit. No haggling required.

Once you place your order, your Tesla account will request a few documents, which can be uploaded online without ever speaking with someone. If you have questions, a specialist will email you shortly after your order to guide you through your new purchase.

Motor Authority

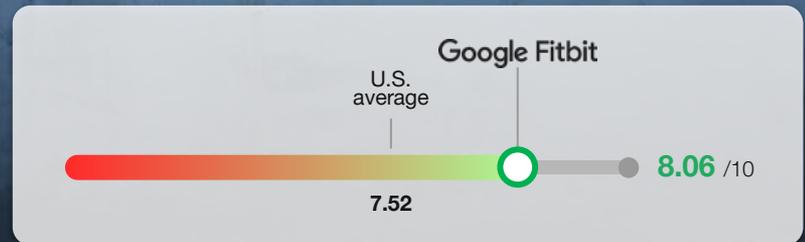


FITBIT BY GOOGLE

fitbit.com

Fitbit by Google AI is about to change how people work out. Anyone who exercises regularly knows that every day is different. After an exhausting work trip, for example, you probably aren't as ready for a workout as you would be after getting plenty of sleep over the weekend.

Fitbit by Google AI can help with scenarios like these, bringing the buzzy tech to its fitness app. The upcoming program will harness AI to provide deeper health insights, such as answering questions about why your run may have been harder today than it was yesterday, and much more in the works.

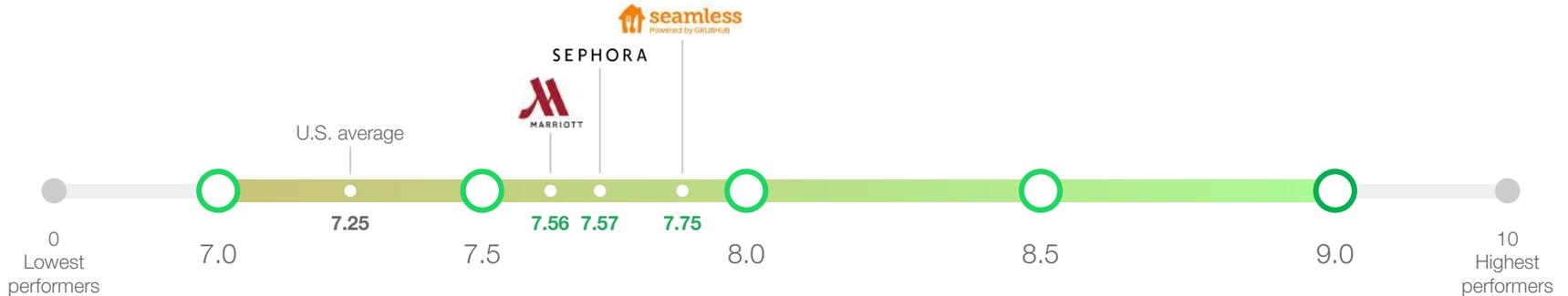


03

MAKE DATA MORE REWARDING

CUSTOMERS KNOW HOW VALUABLE THEIR DATA IS

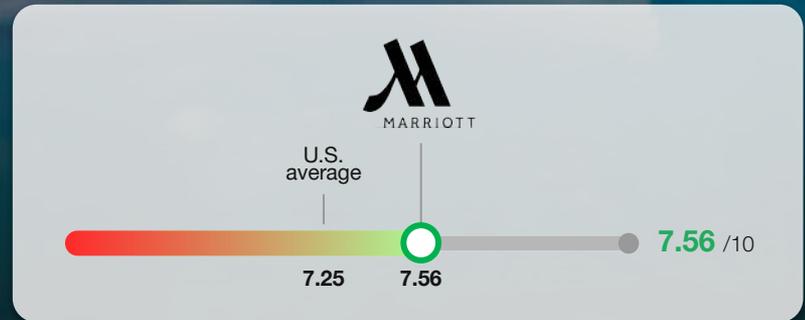
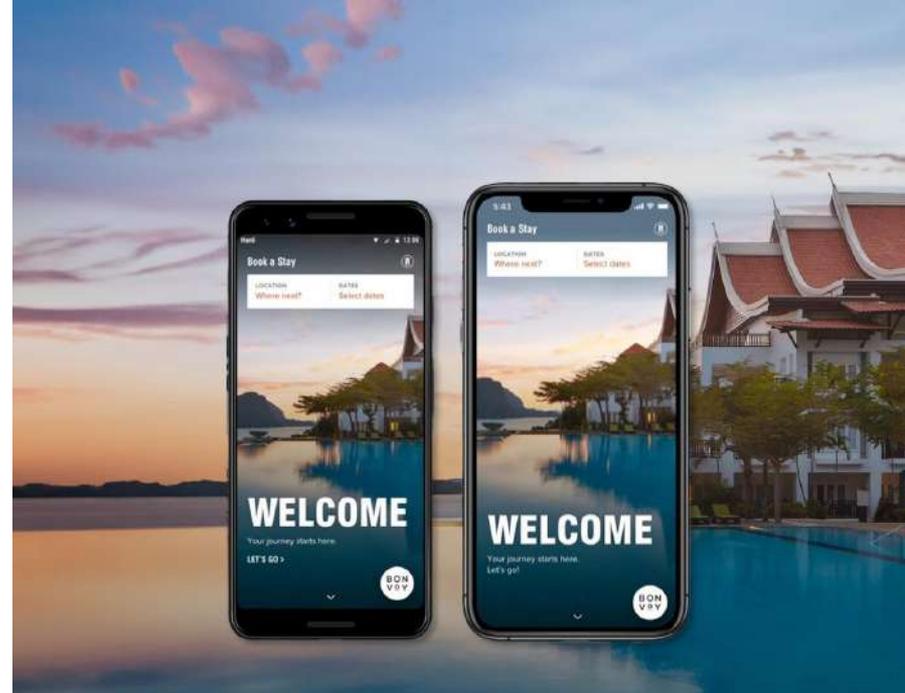
So in exchange for giving it up, they want to be incentivized. The more they give, the more they expect. Tiered loyalty programs that are hyper-personalized are on the rise.



MARRIOTT

Marriott Bonvoy is the loyalty program for Marriott's extensive portfolio of hotel brands, which includes everything from budget friendly options to luxury retreats. It's a points based system where members earn points for stays, dining, and other eligible spending.

Members can achieve different tiers based on their spending, offering escalating benefits like room upgrades, late check out and lounge access. Their accumulated points can also be used for hotel stays, flights, car rentals, and even unique experiences through Bonvoy Moments. Those experiences come to life through Bonvoy partnerships with airlines, car rental companies, and other travel related businesses, allowing members to earn and redeem points across multiple platforms.

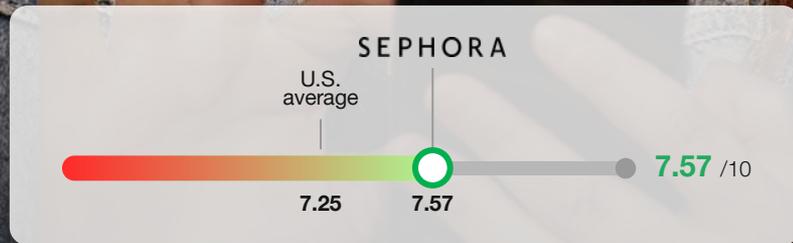
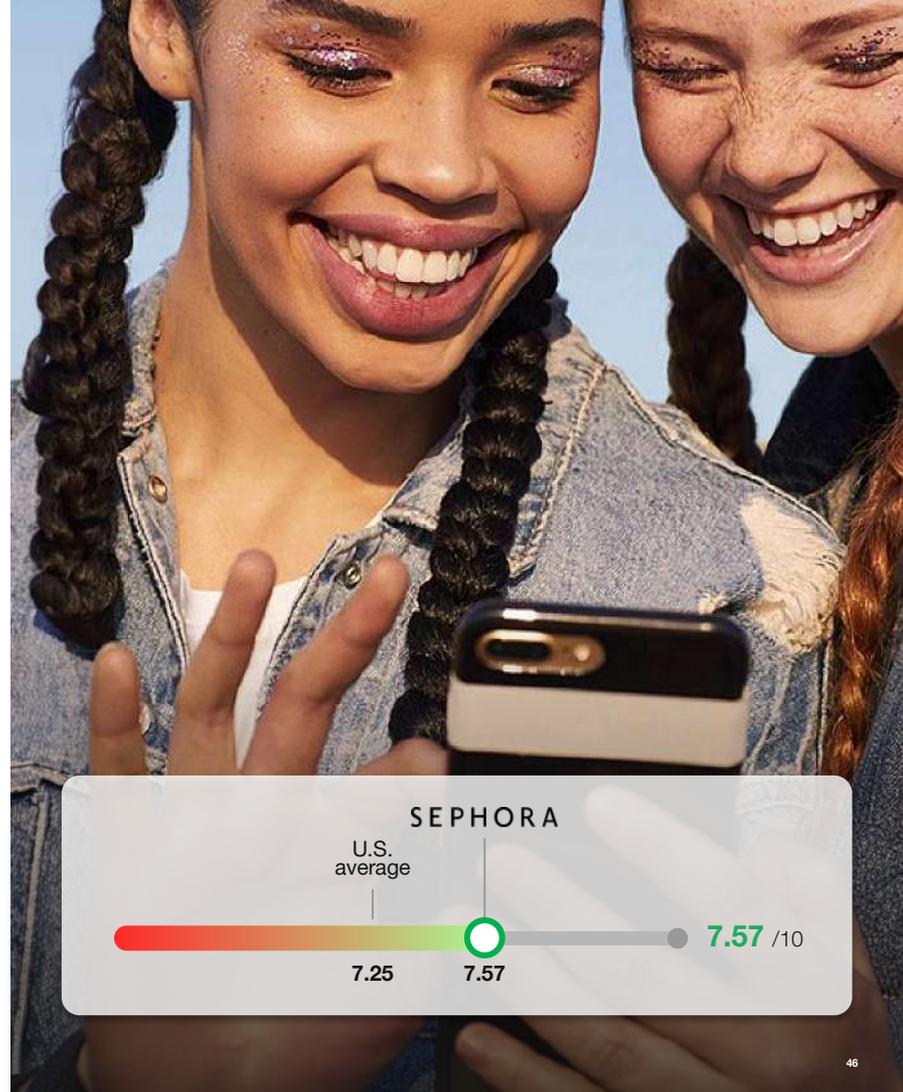


SEPHORA

Sephora Beauty Insider, within the loyalty program, has changed the beauty game. The new feature, called “Beauty Insider Challenges,” is a first-of-its-kind approach for the retailer. It is transforming customer data into engagement gold. By gamifying the loyalty program, Sephora has boosted engagement by 47%, loyalty by 22% and brand awareness by 15%. This provides that turning customer insights into interactive experiences pays off big.

“[Our customers] couldn’t have been clearer when they told us they want gaming elements included in our loyalty program to create more ways to connect with Sephora,” - Emeline Berling, SVP and GM of loyalty at Sephora.

sephora-catalog.com

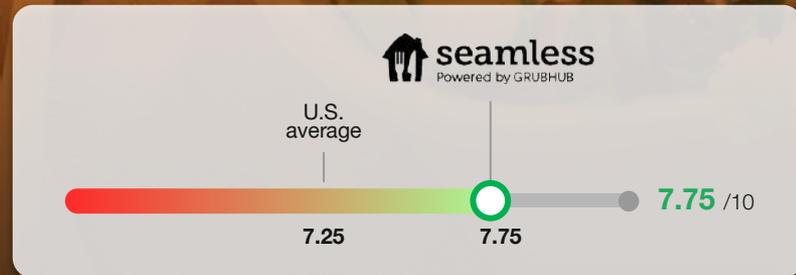
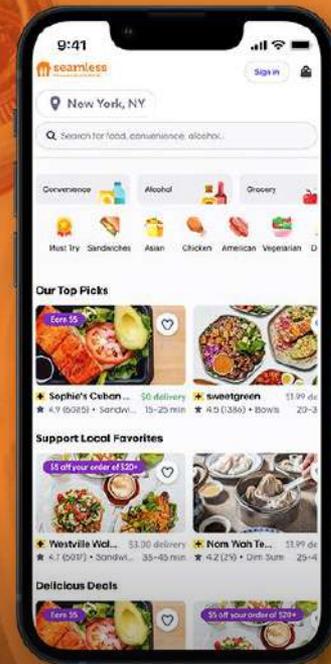


SEAMLESS

Seamless App is a popular online food ordering and delivery platform that connects customers with local restaurants. It offers a convenient way to browse menus, place orders, and have food delivered to your doorstep. The platform allows customers to earn rewards and score on exclusive deals from their favorite restaurants.

Seamless also helps restaurants expand their customer base and provides valuable insights into customer preferences and ordering habits. Essentially, Seamless acts as a bridge between hungry customers and restaurants, leveraging data to drive efficiency and optimization for both parties.

seamless.com





WARBY PARKER

TESLA

Google Fitbit



SEPHORA



GO BEYOND EXPECTATIONS

01 _____

Next-gen
personalization

02 _____

Redefine
norms with tech

03 _____

Make data
more rewarding

A NEW EQUATION DRIVING VALUE FOR CX

EFFICIENCY

+

PLEASURE

+

GOING BEYOND

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. 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 engaging.

YET, TO TRULY DIFFERENTIATE AND LEAD IN THE CX DOMAIN, COMPANIES MUST STRIVE TO GO BEYOND WHAT IS EXPECTED.

THANK YOU

For more information or to deep-dive into a specific brand, category, or market, please contact:
Patrick Thistlethwaite, Global Chief Growth Officer, CX | patrick.thistlethwaite@havas.com