2018 Customer Experience Excellence for Australia

Customer Experience Themes

CX leaders exemplify alignment around what good will look like for their customers and deliver on that vision across the front, middle and back of house.

Excellence
- Commitment to excellence
- Organised around the customer

Engagement
- Alignment of employee experience (EX) and customer experience (CX)
- Motivation and passion

Execution
- Attention to detail
- Constant monitoring

Economics
- Attention to detail
- CX links to value
- Experience optimisation

2018 Global Study Scope

- 14 Countries
- 54,231* Consumers
- c. 1,400 Cross-sector brands
- 593,355 Individual evaluations

*includes 2,562 Australian consumers

Key Metrics: The Six Pillars of Customer Experience Excellence (CEE)

- Personalisation
  Using individualised attention to drive an emotional connection.
- Time and Effort
  Minimising customer effort and creating frictionless processes.
- Resolution
  Turning a disappointing experience into a great one.
- Integrity
  Being trustworthy and engendering trust.
- Expectations
  Managing, meeting and exceeding customer expectations.
- Empathy
  Achieving an understanding of the customer’s circumstances to drive deep rapport.

Pillar Impact of Customer Experience Excellence

Australian consumers rate Personalisation as the key driver for Customer Experience Excellence.
Insights From Australia’s Top Rated CX Brands

#1 - Singapore Airlines
Highest ranked CX brand in Australia and market leader in Integrity and Empathy

“As I was dozing off, a stewardess gently put a very comfy blanket over me. I don’t know why but that really impressed me – they are the best surely – everything was just perfect.”

CEE Australia Respondent

#3 - Bendigo Bank
Best ranked Australian brand and market leader in Resolution, and Time and Effort

“They contacted me with information about changing my account to one with a better return for me.”

CEE Australia Respondent

Australian Top 10 CX Brands
Individual CEE score out of 10

1. Singapore Airlines 7.94
2. Emirates 7.91
3. Bendigo Bank 7.90
4. Paypal 7.83
5. Bunnings 7.56
6. The Body Shop 7.56
7. Dan Murphy’s 7.56
8. Grill’d 7.53
9. ING 7.52
10. Millers 7.50

Australian Leading Sectors
Sector average CEE score out of 10

1. Grocery Retail 7.26
2. Non-Grocery Retail 7.25
3. Travel, Hotels and Airlines 7.23

CX in Australia is perceived as flat
Australian consumers are ‘flat’ on their experiences, with little noted differentiation compared to other markets

Distribution of CEE scores in market

<table>
<thead>
<tr>
<th>Country</th>
<th>Highest score in market</th>
<th>Lowest score in market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>7.94</td>
<td>6.17</td>
</tr>
<tr>
<td>UK</td>
<td>8.22</td>
<td>4.21</td>
</tr>
</tbody>
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Key Takeaways

International companies are providing leading customer experiences

Personalisation is the most appreciated CX attribute

Trust is becoming more important

Australian consumers perceive most experiences as lacking differentiation

Current environment offers a great opportunity for sustainable growth

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