

DRIVING **LOYALTY** AND **LIFE-TIME VALUE** THROUGH **GREAT CUSTOMER** **EXPERIENCE**

CX Global Insights 2025

Javier Calvar

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Ipsos's CX Global Insights 2025

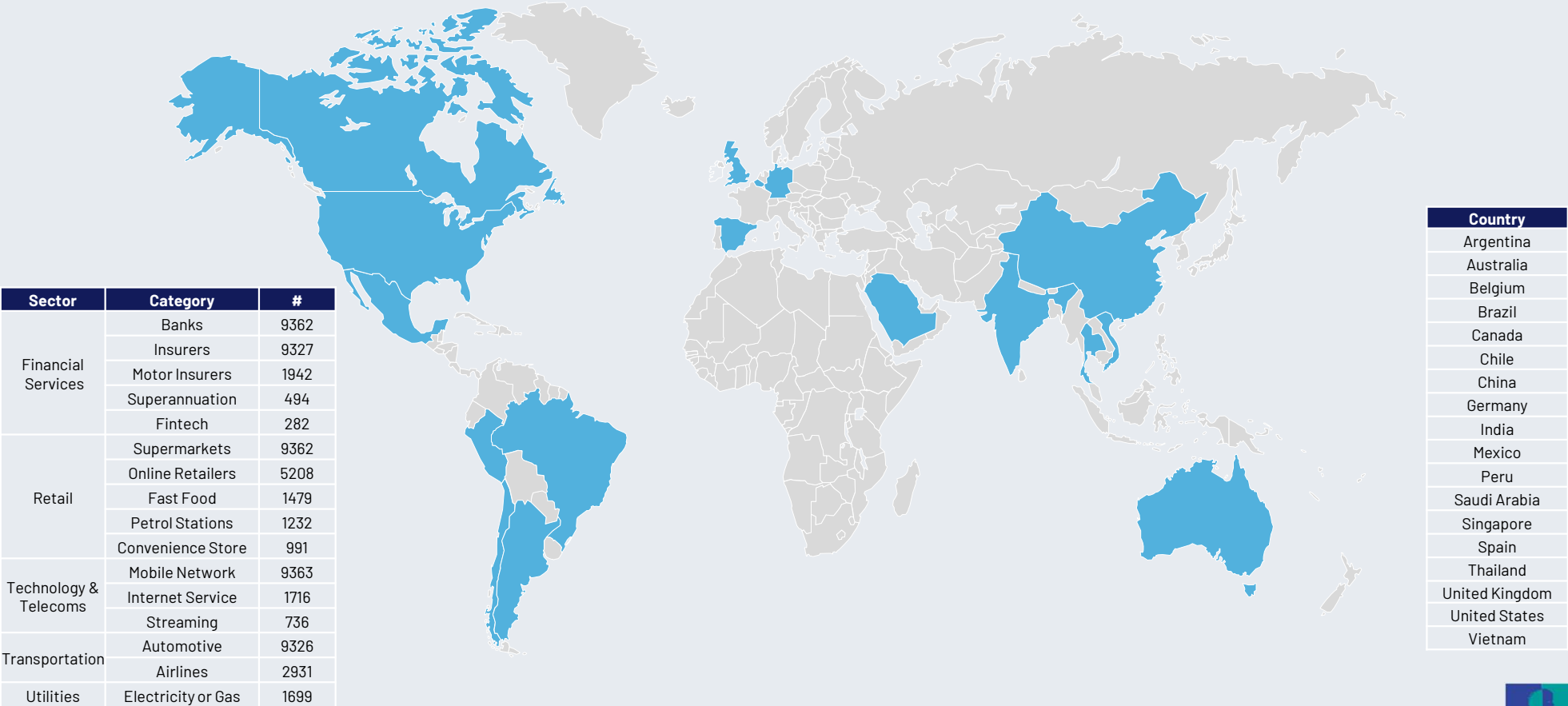
CX Global insights 2025 was launched to unveil trends and opportunities to elevate Customer Experience.

A standardised benchmark study that covers

- CX performance and KPIs across **multiple sectors and countries**
- The importance of creating an **emotional attachment** with customers and its impact on customer and business outcomes
- The **experiential and emotional levers** brands need to pull to create stronger relationships.

Over 65,000 evaluations across multiple sectors and countries ...

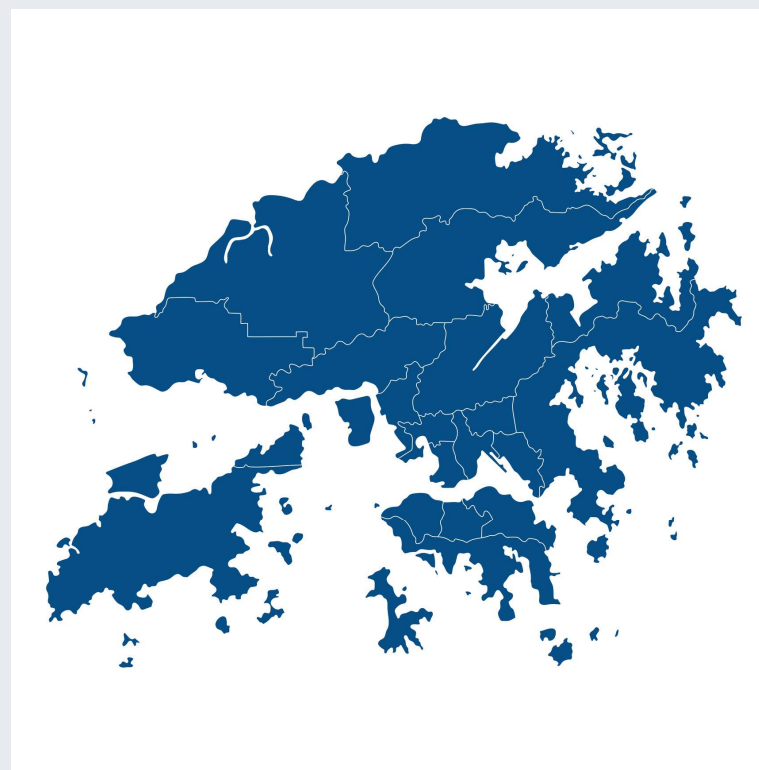
CX GLOBAL
INSIGHTS 2025



... and 200 Hong Kong residents staying at five-star hotels in past six months

HONG KONG LOCAL TRACKER

Hotel Location	#	%
Mainland China		
- Shenzhen	72	36%
- Shanghai		
- Guangzhou		
- Hangzhou		
- Zhuhai		
Japan		
- Tokyo	30	15%
- Osaka		
- Kyoto		
- Fukuoka		
Hong Kong S.A.R., China	29	15%
Macau S.A.R., China	20	10%
Singapore	15	8%
Thailand		
- Bangkok	10	5%
- Phuket		
Malaysia		
- Kuala Lumpur	5	3%
- Penang		
Taiwan		
- Taipei	4	2%
Australia		
- Sydney	4	2%
- Melbourne		
South Korea		
- Seoul	3	2%
- Jeju Island		
Other countries		
- United Arab Emirates	8	4%
- Maldives		
- Philippines		
- United Kingdom		
- USA		



What we will be covering



HEADLINES

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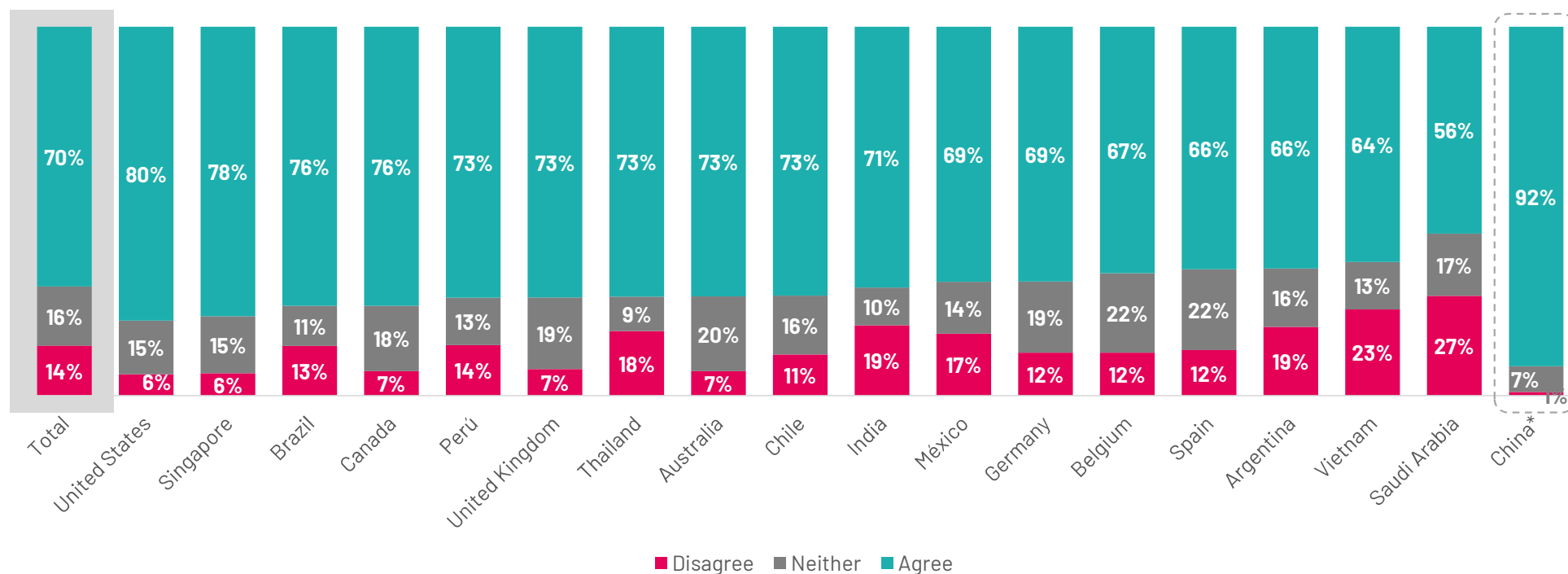
70%

of customers say they choose to use a brand because they know the experience will be good



70% of customers say they choose to use a brand because they know the experience will be good

"I choose to use a brand because I know the experience will be good"





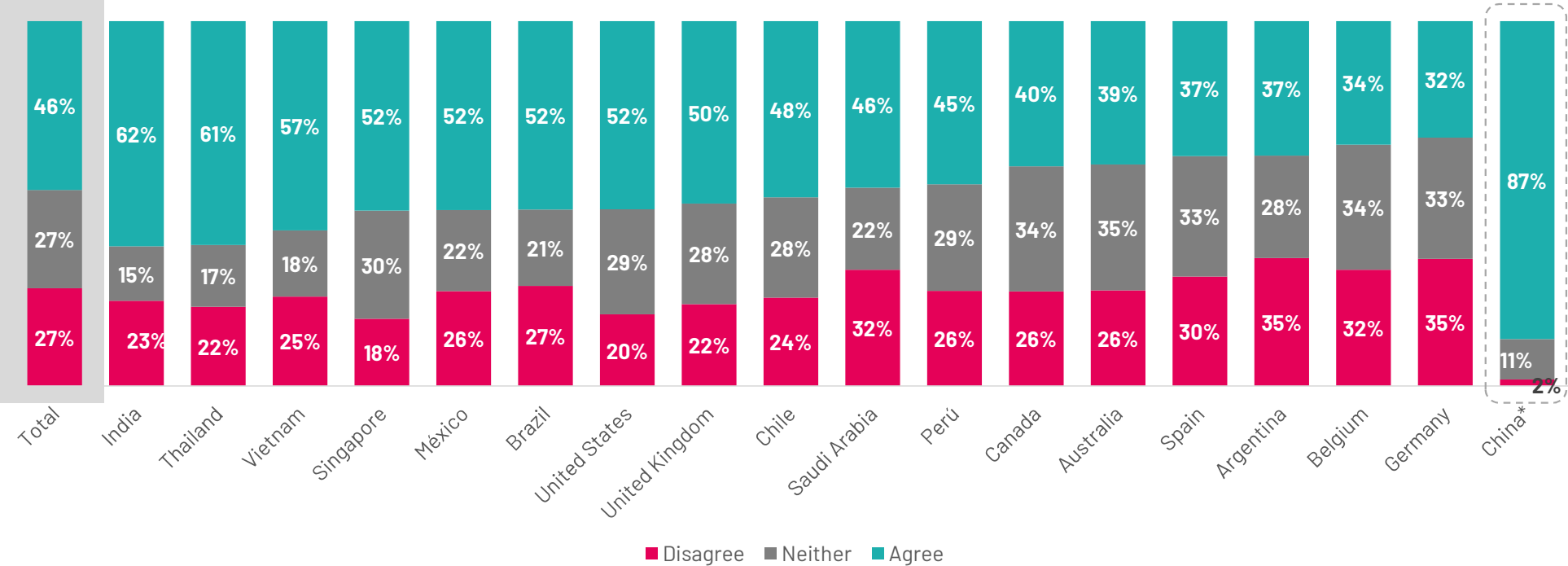
And nearly

50%

say they are willing to
pay more to get better
experiences

And nearly 50% are willing to pay more to get better experiences

"I am willing to pay more to get better experiences as a customer"



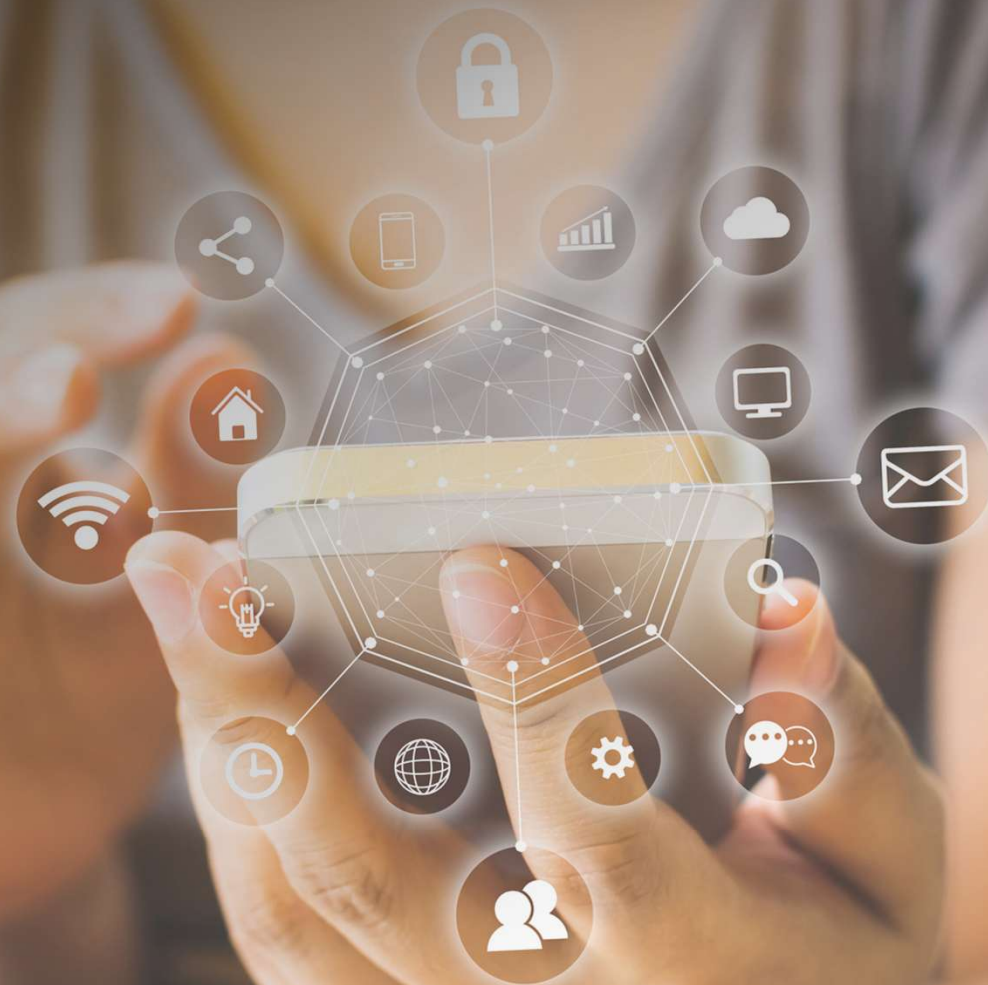
*China: study run separately as a pilot, not included in Total.



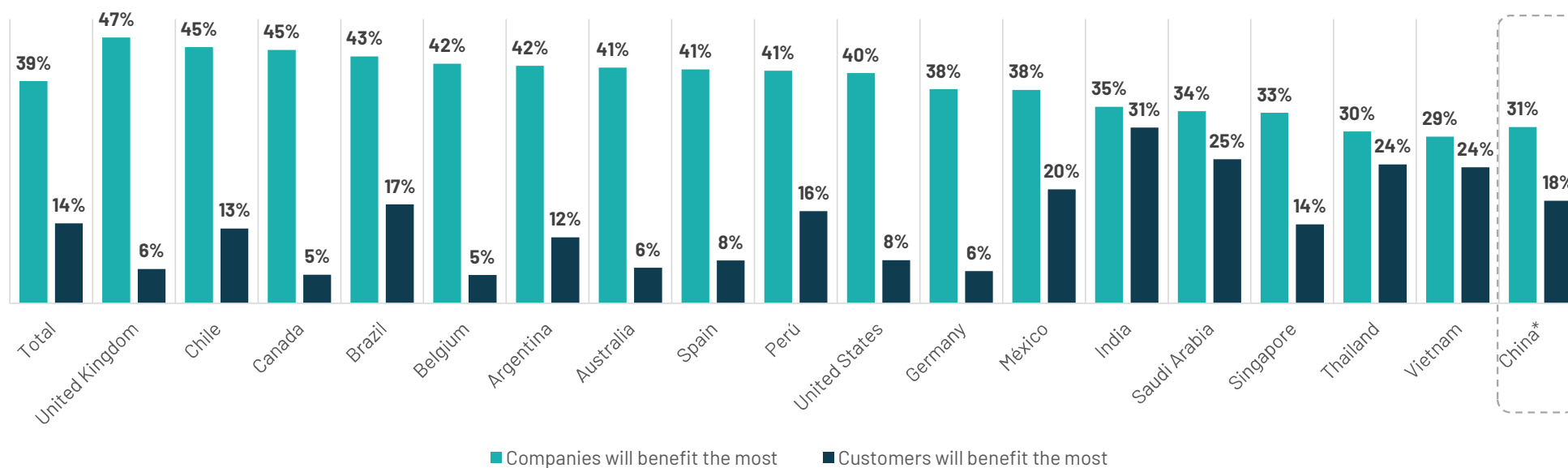
4 in 10
customers believe
companies will end
up benefitting
most from AI



Only
14%
think Customers
will benefit most



4 in 10 customers believe companies will end up benefitting most from AI. Only 14% think Customers will benefit most



EMOTIONAL ATTACHMENT

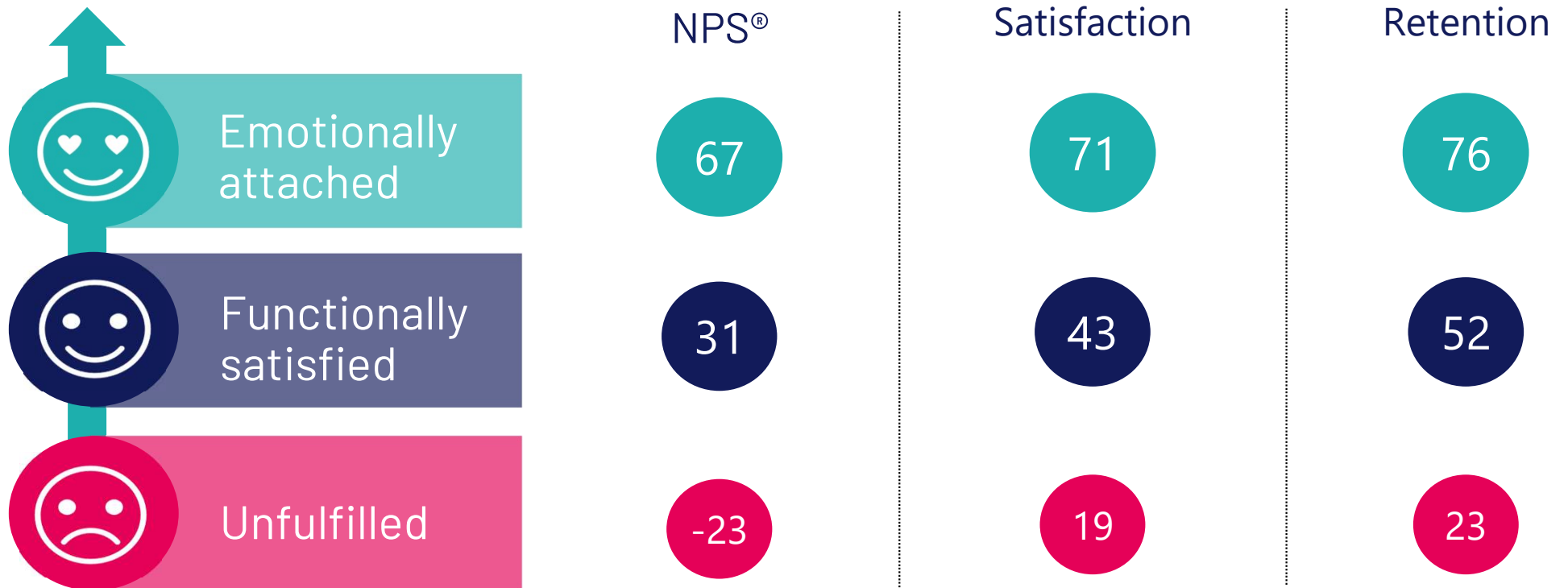


Customers become advocates of brands because they develop an emotional connection with their core purpose. Brands that elicit advocacy provide a value beyond just product quality and experience.

This connection is something that deserves analysis, as it is the foundation of true loyalty.”

- Michael Crooke, former Patagonia CEO

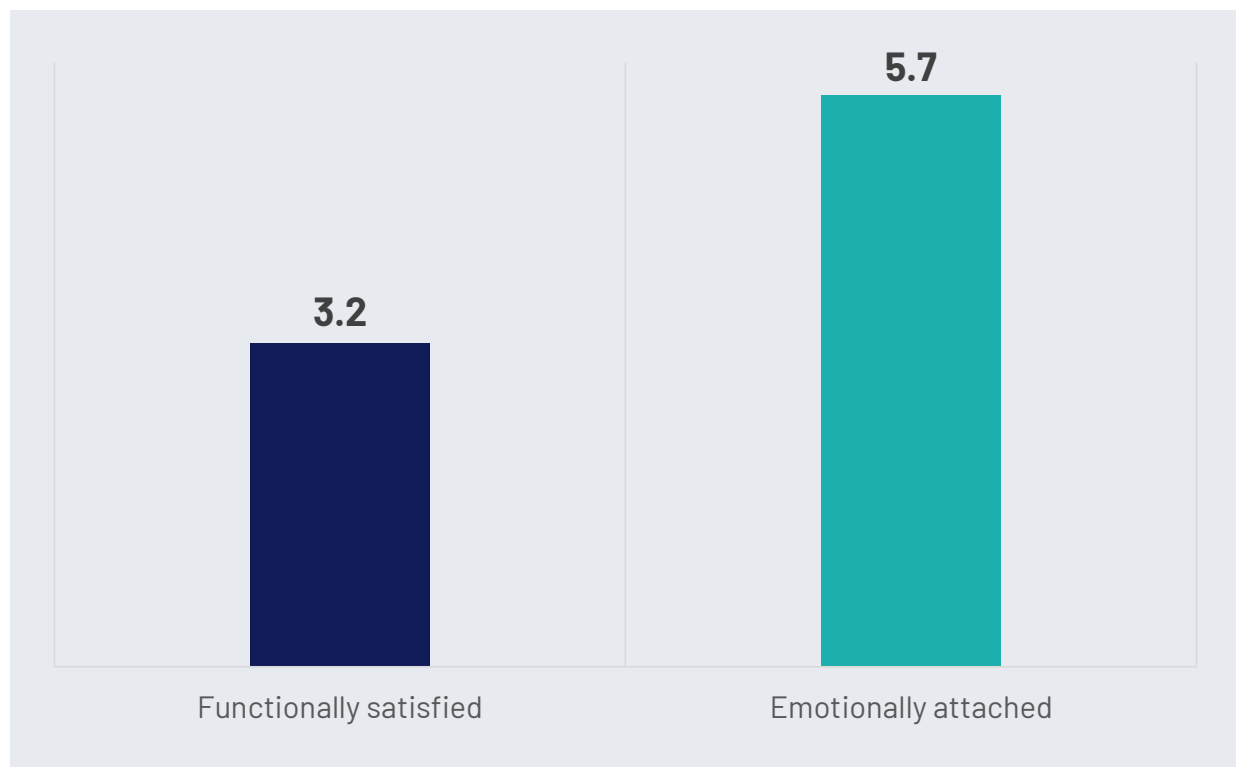
Emotional attachment is linked to higher CX KPIs and Customer Lifetime Value (CLV)



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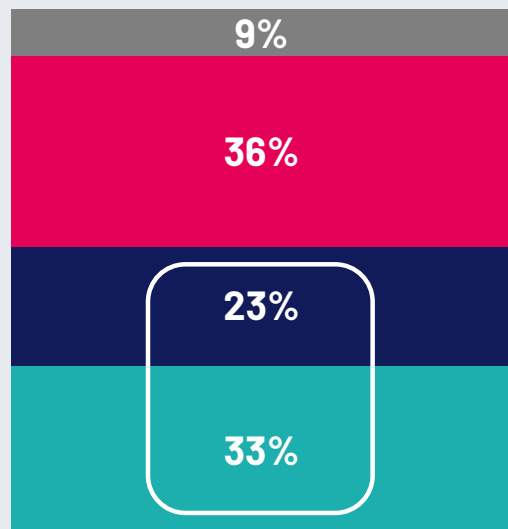
Emotional attachment is associated to higher rates of recommendation hence contributing to customer acquisition

"How many times have you positively recommended BRAND to friends and family in the last 12 months?"



Emotionally attached are more actively promoting the brand they use to others.

Advocacy does impact customer acquisition

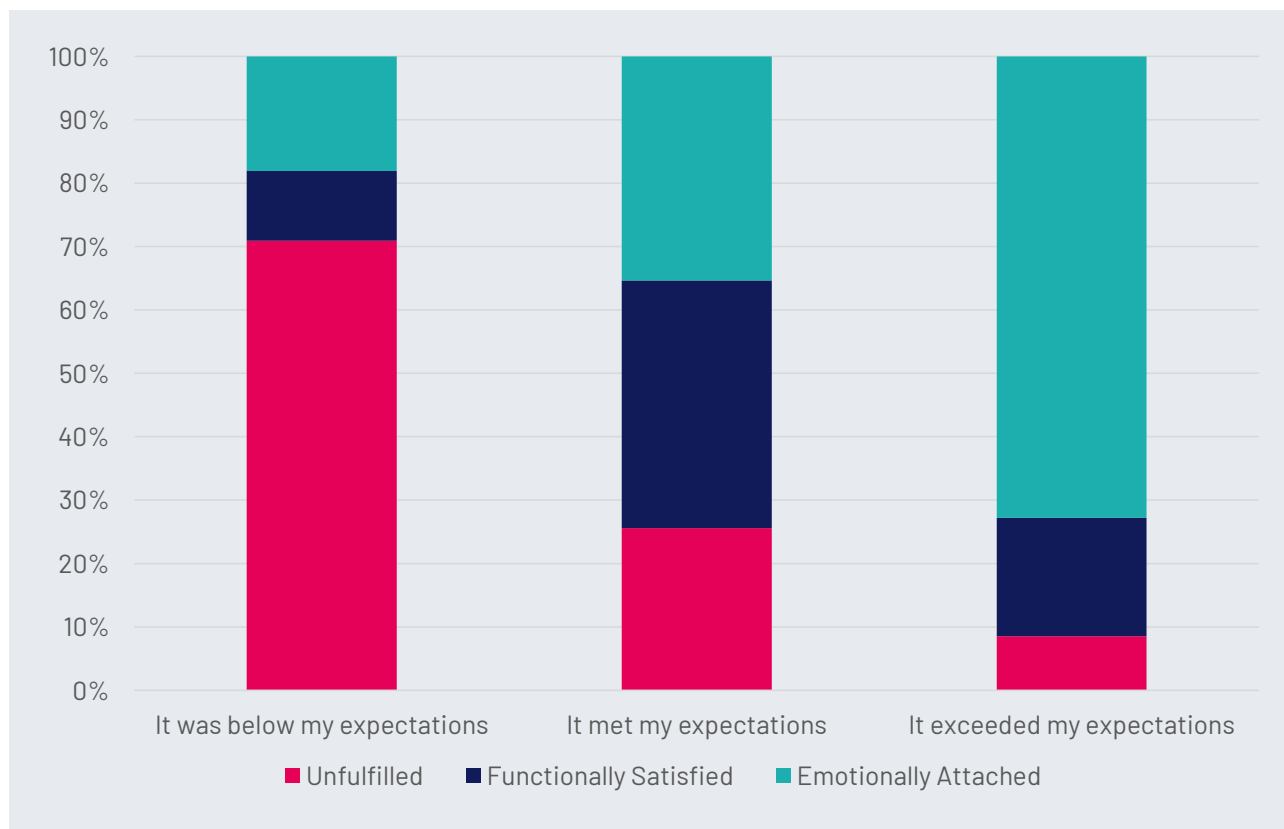


- Don't know/can't remember
- No - recommendation did not form part of my decision
- Yes - recommendation formed part of my decision but wasn't the main reason
- Yes - recommendation was the main reason I used/bought from them

Globally 55% of customers say that recommendation impacted their decision to start using a brand...with significant variations by country and sector.

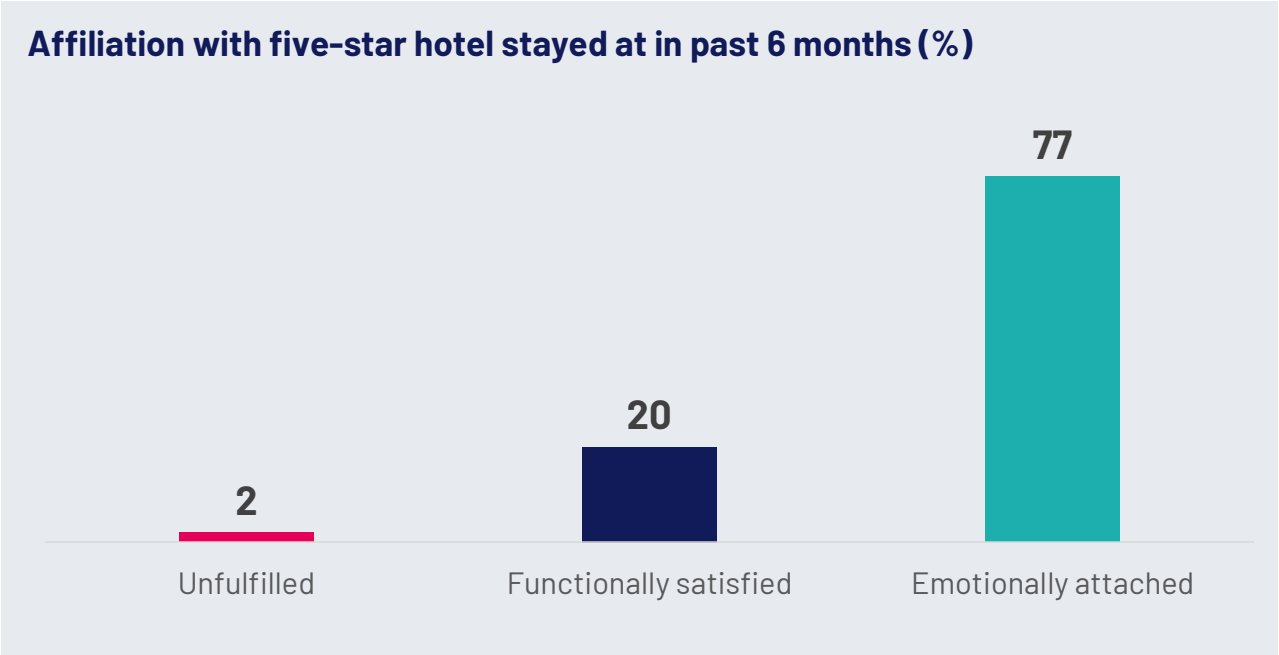
Thinking back to when you first used or paid for products or services from [BRAND], did you do this as a result of a recommendation from friends, family or social media?

Meeting or exceeding expectations via the experience is key to create emotional attachment



Emotional attachment cannot be bought...it needs to be earned via the quality of experiences delivered to customers.

Nearly 3 in 4 luxury hotel guests are emotionally attached to the hotel brand they've stayed at.

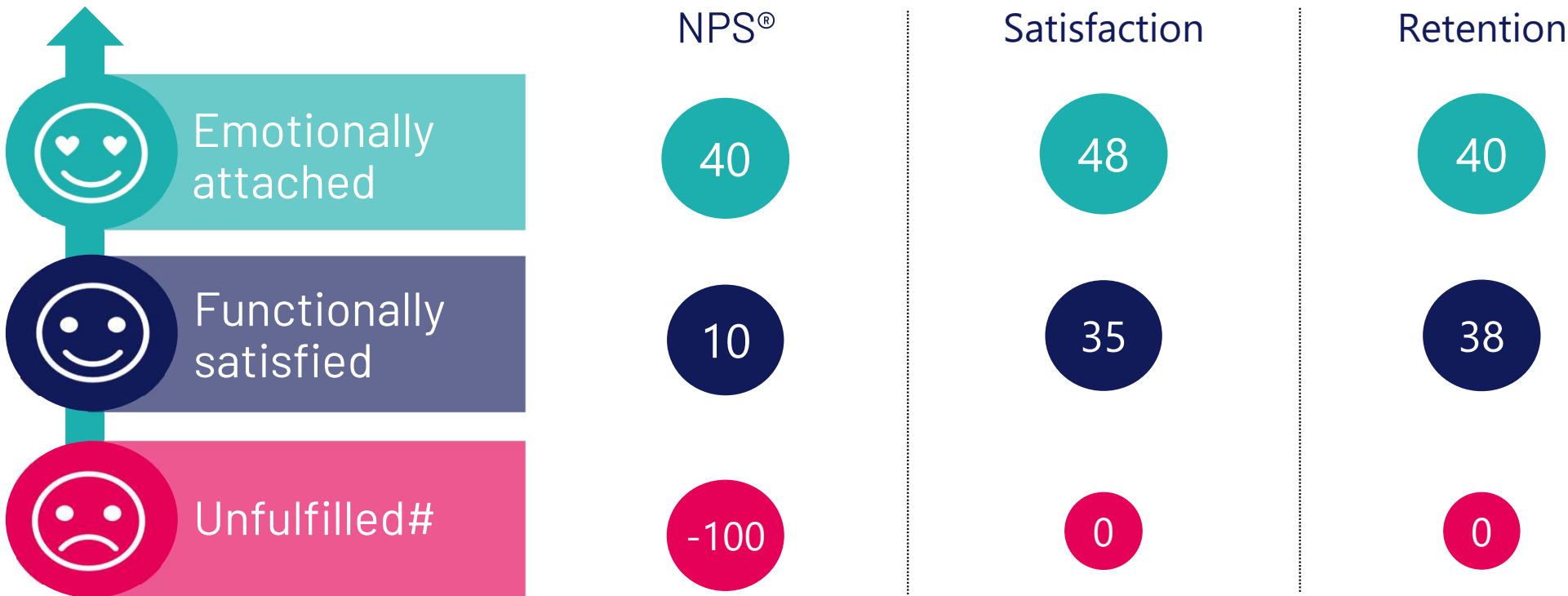


Emotional attachment is critical in hospitality

- To what extent do you agree or disagree with the following statement: "I feel attached to the hotel"?
- Thinking of your stay at [hotel name], to what extent do you agree that your overall experience matched what you expected?



Emotional attachment also leads to greater CLV in hospitality



#Remark: Results of Unfulfilled are based on very small base samples from Hong Kong Local Tracker – Wave 34

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Summary

■ CX is a key driver of Brand Success as it impacts brand growth through retention, increased usage AND acquisition.

■ Emotional Attachment is key to CX success

- It links to higher customer lifetime value.
- It also impacts customer acquisition via customer recommendations.
- It can insulate brands from occasional mistakes.



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HOW TO SUCCEED IN CX

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Globally, it's a tale of two halves ...

51%

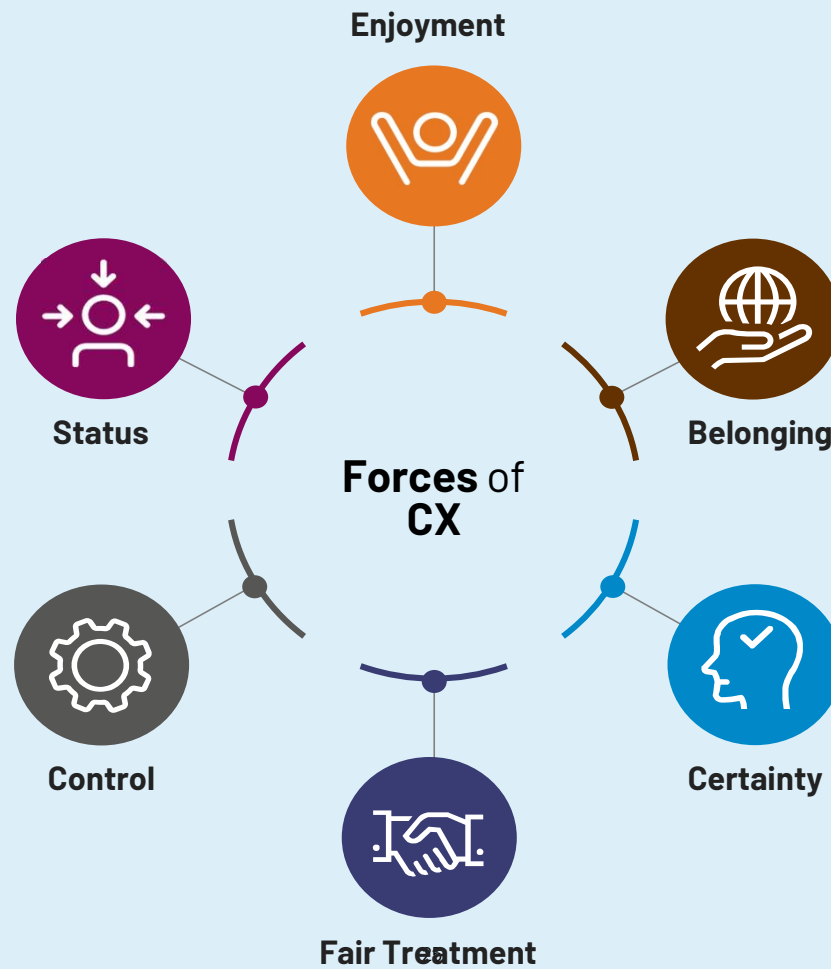
Said they have had
great experiences



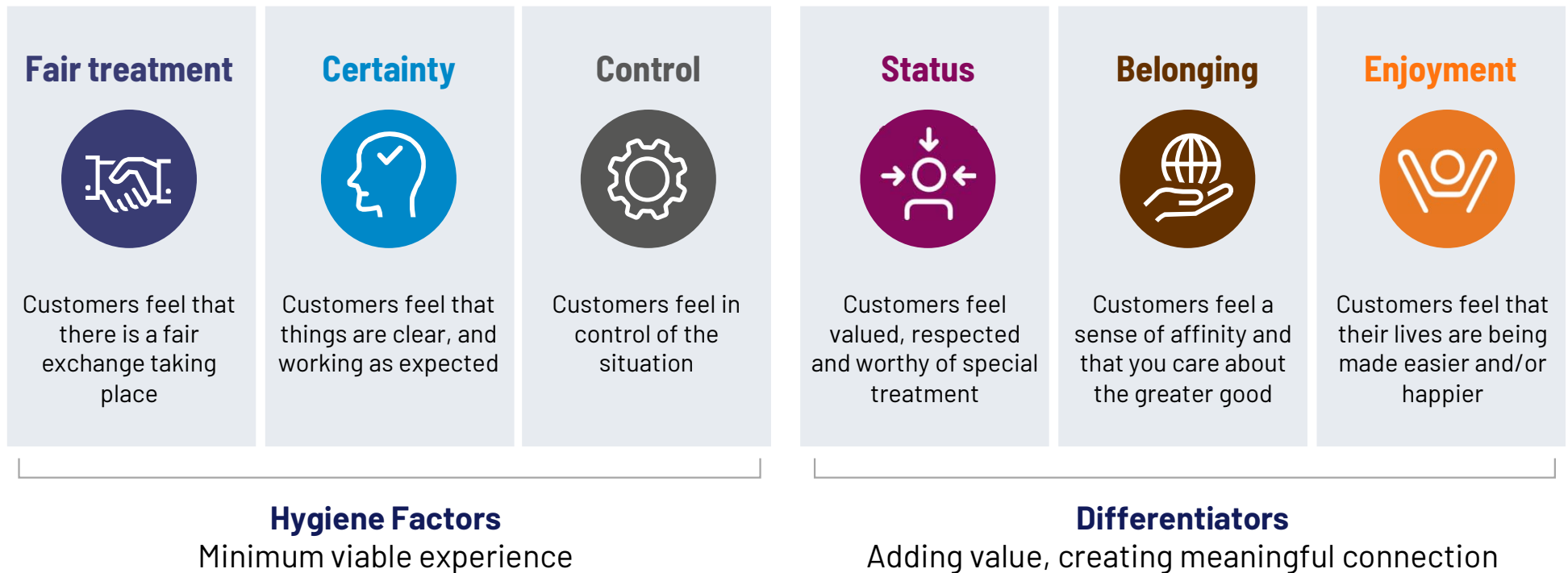
57%

Said that their experiences
were either unmemorable
or poor

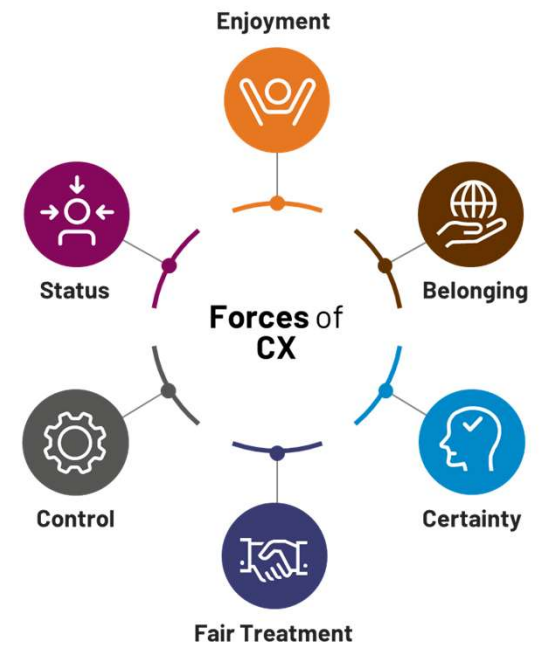
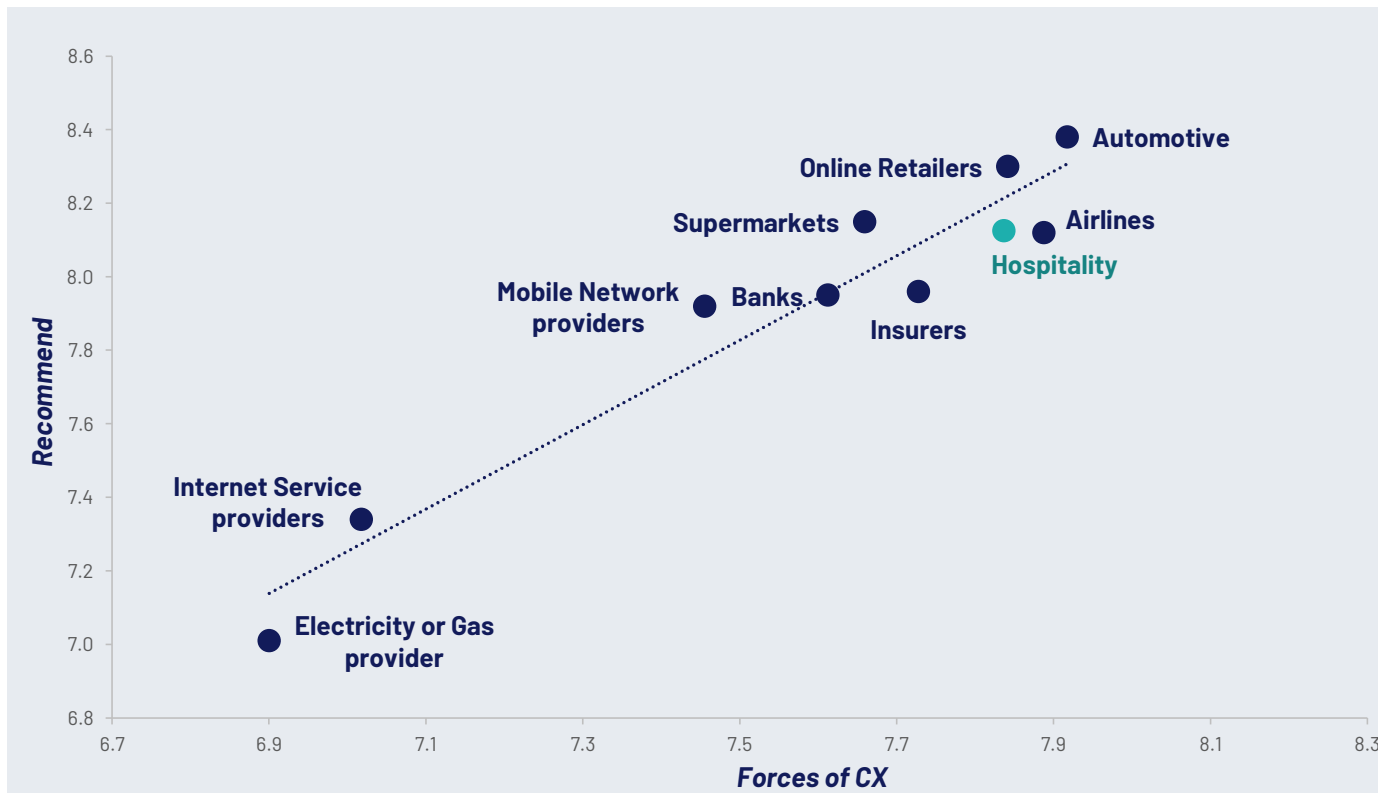
Key success factors for CX



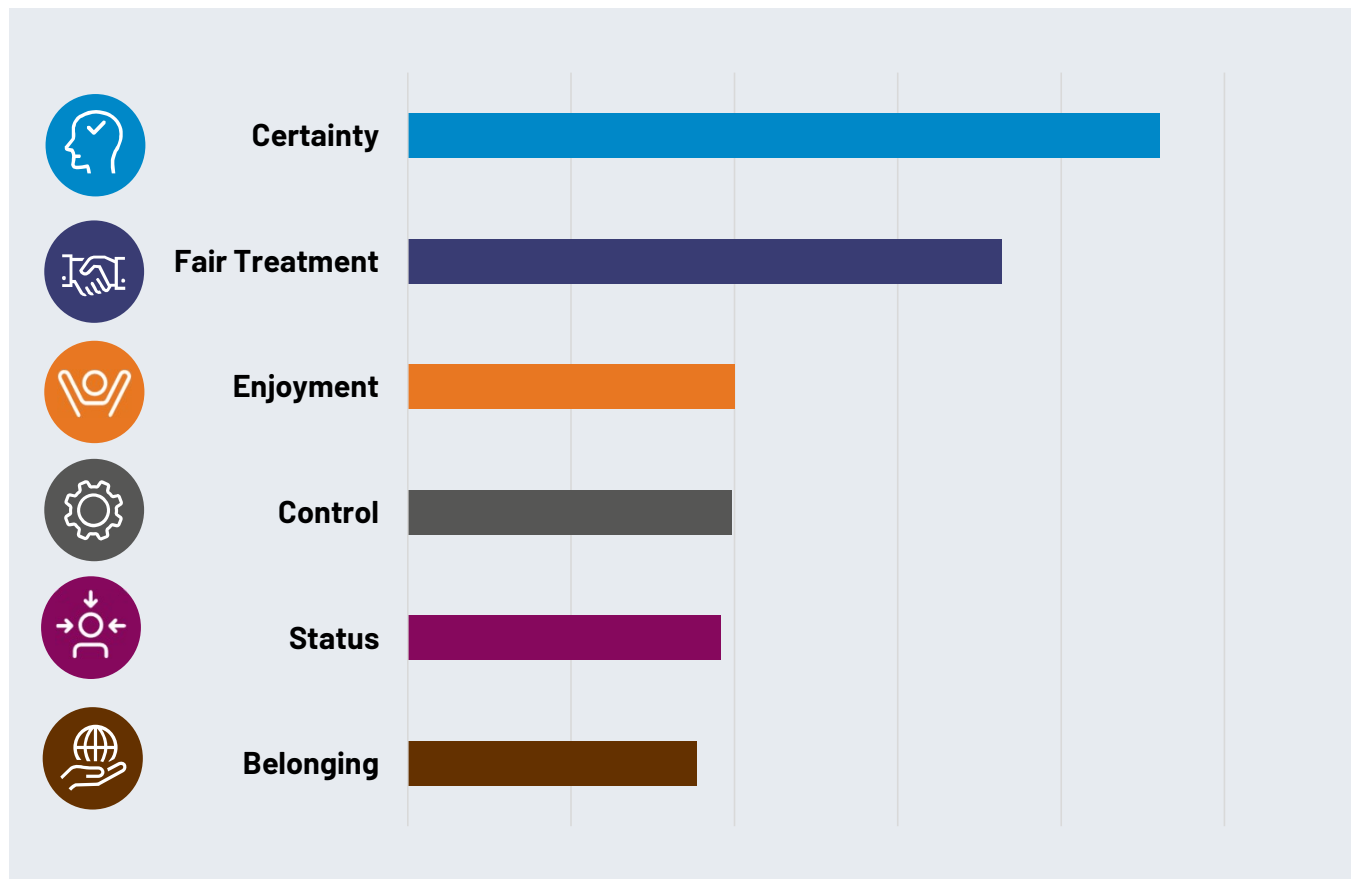
How the Forces of CX build strong relationships



The Forces of CX matter because they explain and predict customer outcomes



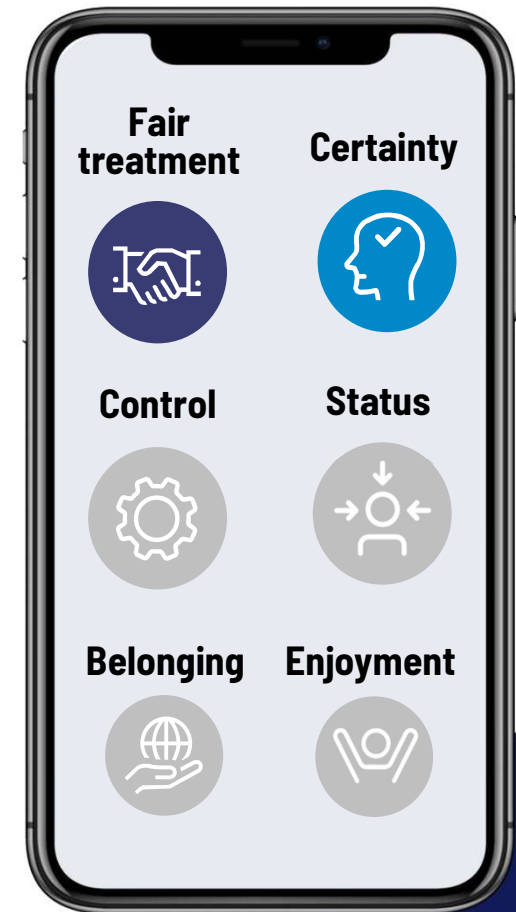
Relative importance of the Forces of CX on relationship strength



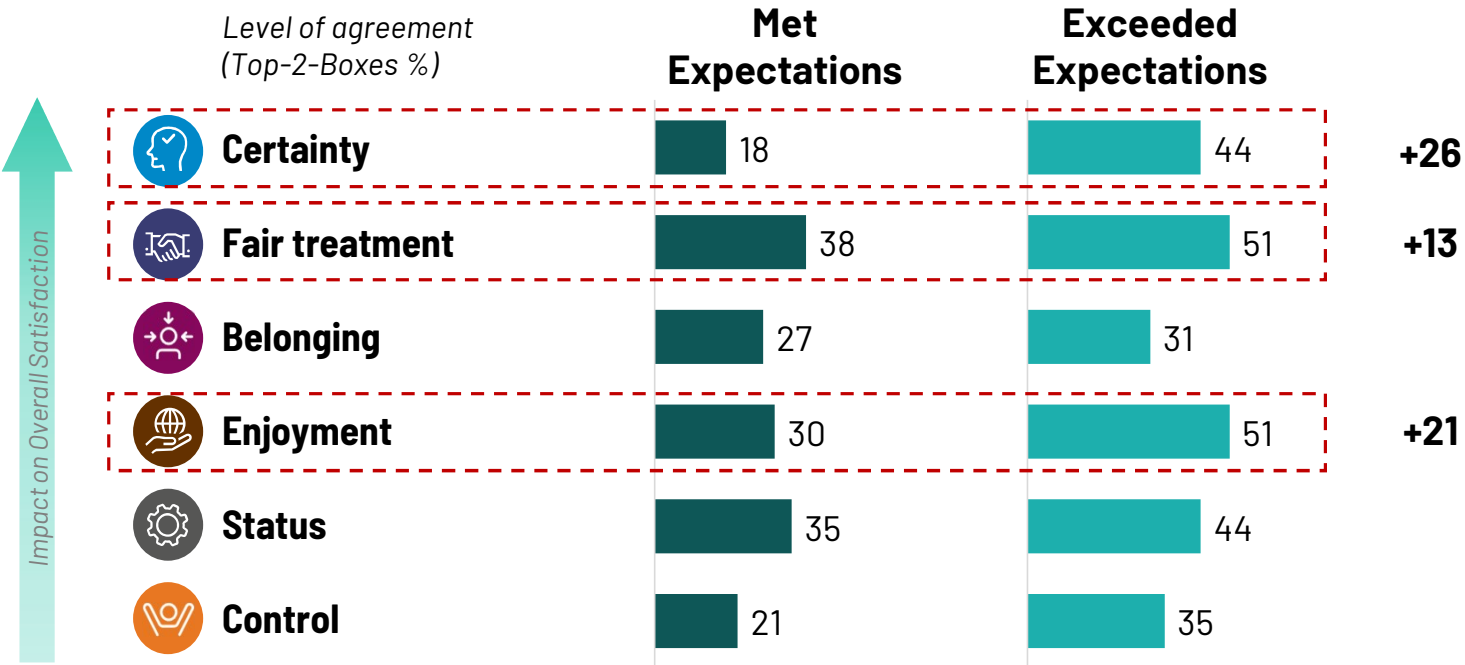
At global level, the CX market is mainly driven by hygiene Forces of Certainty and Fair Treatment – highlighting the importance of getting the basics right before trying to elevate or differentiate the relationship.

Clarity and transparency in communications

- Proactive updates and notifications
- Consistency in communication
- Effective use of technology for communication
- Timely and responsive customer service
- Unresolved issues and poor customer support

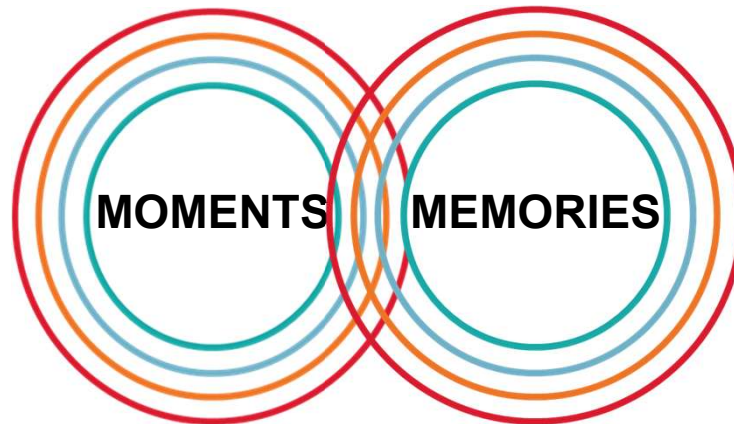


Enjoyment is key to creating delight moments in hospitality



Memorable experiences create emotional attachment and strong customer relationships

INTERACTIONS



EMOTIONS



Source: Ipsos, Hong Kong banking case study

Summary

The Forces of CX are predictors of emotional attachment. They matter as they explain and predict customer outcomes.

Brands perform higher on hygiene Forces such as Fair Treatment and Certainty but there is weaker performance on the more differentiating Forces such as Status, Belonging, and Enjoyment.

An opportunity for brands to go beyond basics to differentiate and lead the pack.

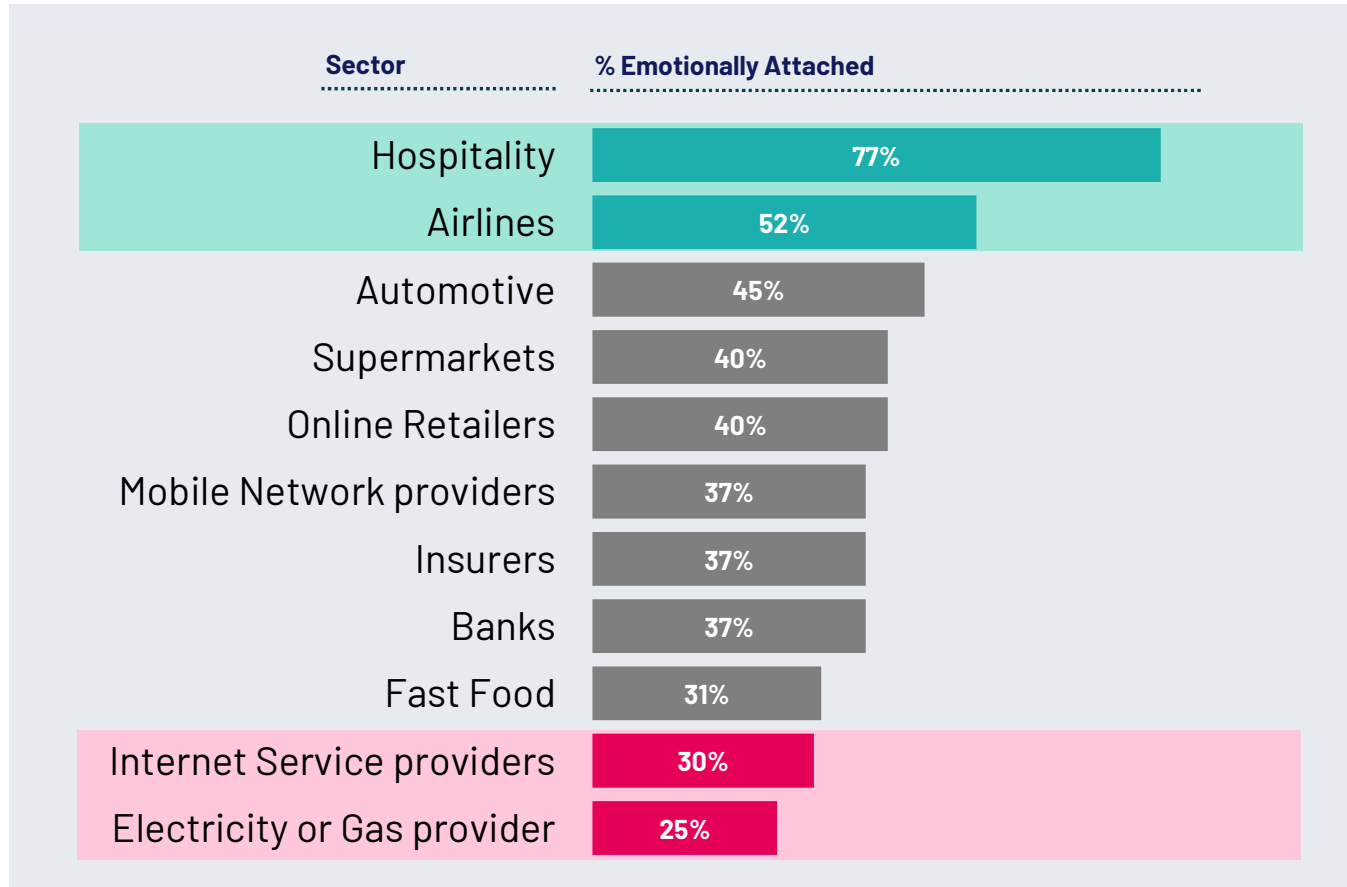
Understanding how to shape CX to deliver a positive impact on the Forces is critical to success.



<https://www.ipsos.com/en/forces-customer-experience>

CROSS SECTOR COMPARISON AND MOMENTS OF TRUTH

Best and worst performers – Emotional attachment



Travel and hospitality lead the pack with ISPs and Electricity/Gas providers showing lowest performance.

Moments of truth: Critical incidents

"Thinking in about your recent contact with X, did you experience any of the following? "

Something particularly good that pleased you

A few small things that pleased you

Thinking about what pleased you, can you tell us what happened?

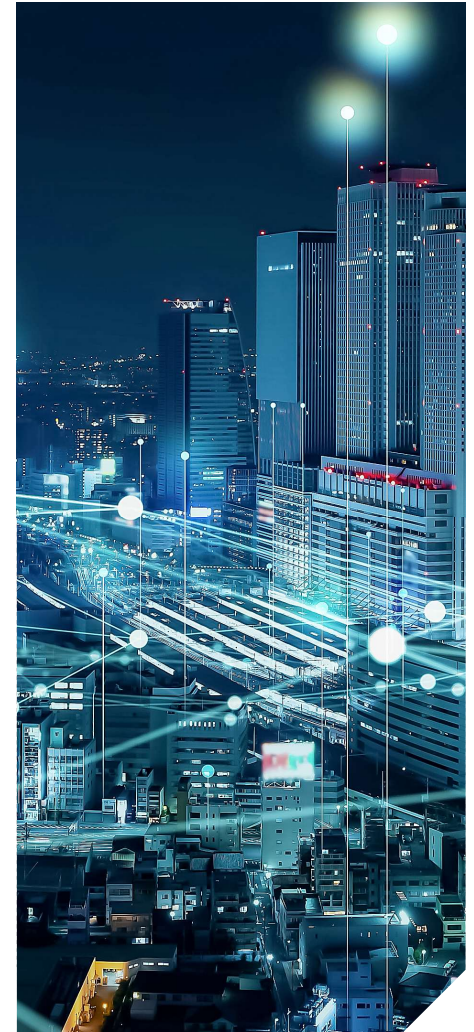
A few minor problems or issues

A major complaint or problem

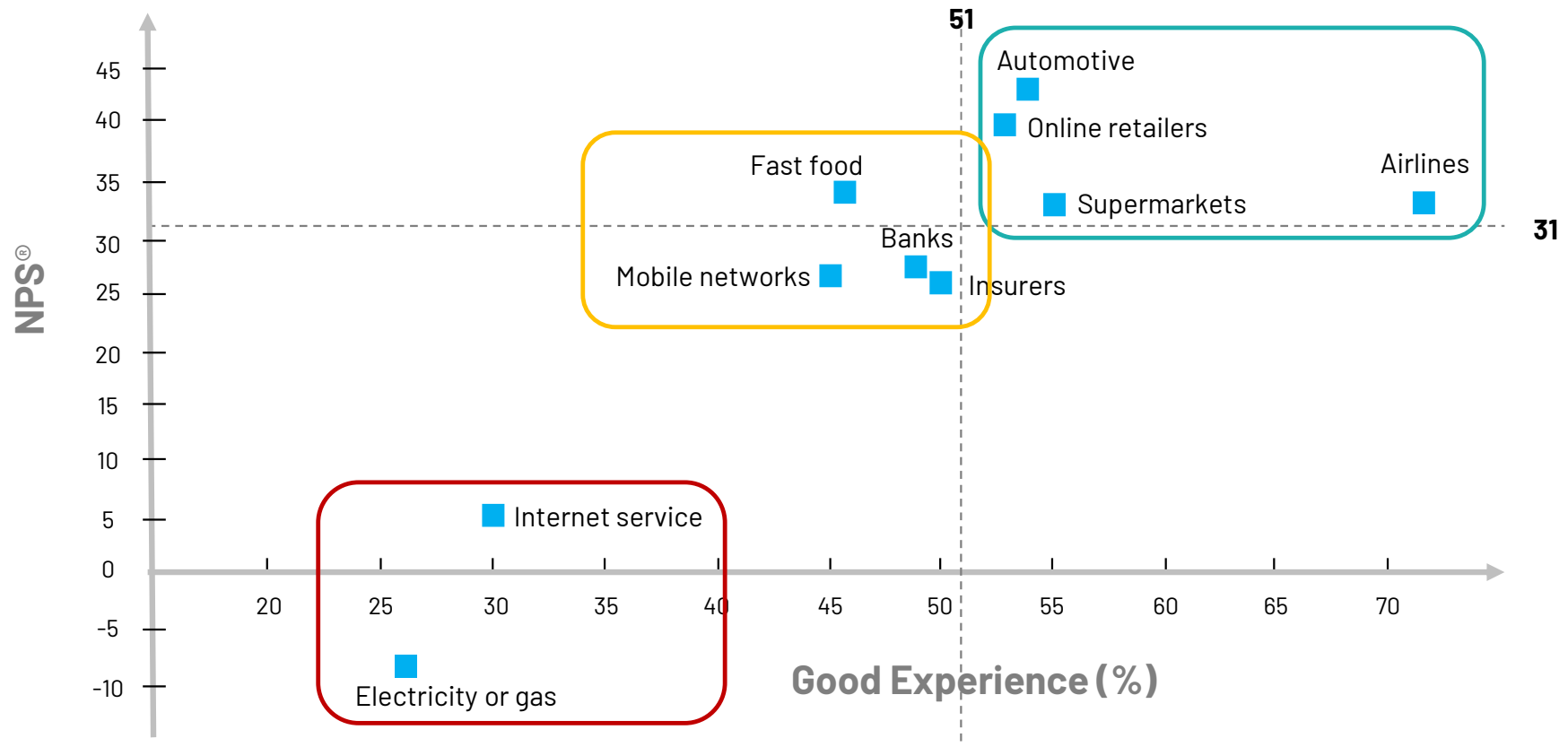
Thinking about the issue(s) you had, can you tell us what happened?

Nothing notable/ None

Was there anything they could have done that would have made this a more notable or memorable?

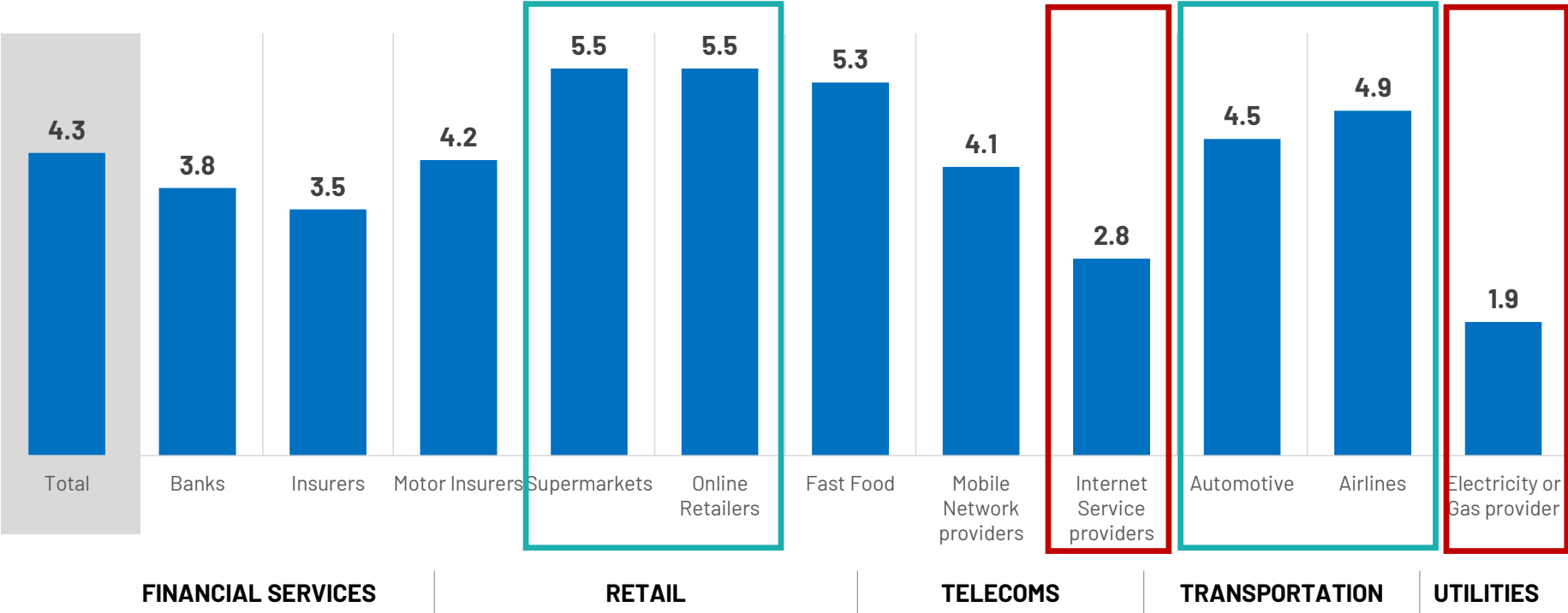


Experience and advocacy: Diversity across sectors



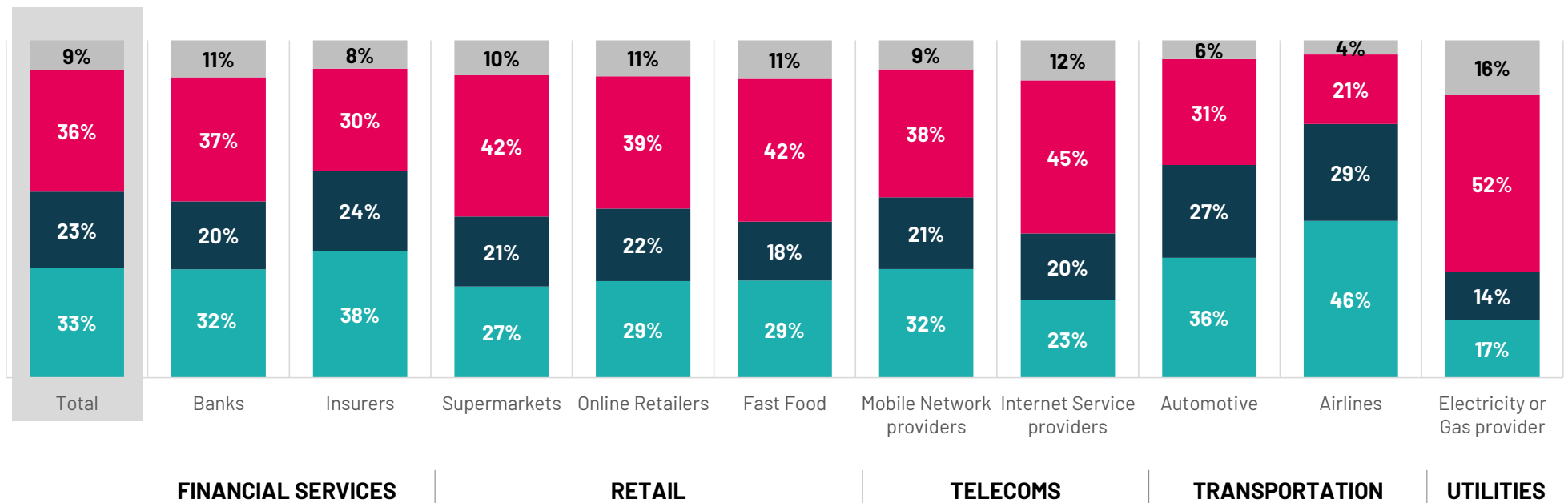
Levels of positive recommendations given vary significantly across sectors ...

How many times have you positively recommended BRAND to friends and family in the last 12 months?



... and 55% of customers say that recommendation impacted their decision to start using a brand with variation depending on sectors

- Don't know/can't remember
- No – recommendation did not form part of my decision
- Yes – recommendation formed part of my decision but wasn't the main reason
- Yes – recommendation was the main reason I used/bought from them

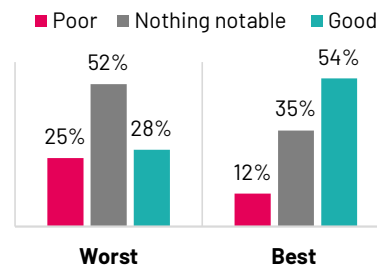


What differentiates best and worst sectors?

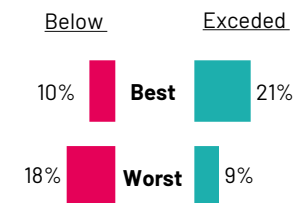
A better and more memorable experience that meets or exceeds expectations.

This leads to a stronger performance on Forces of CX and higher emotional attachment which in turn positively impacts CX KPIs, customer lifetime value, and acquisition potential.

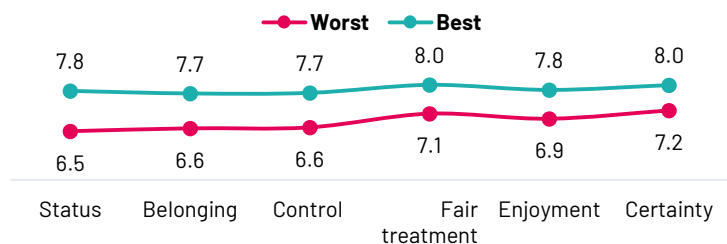
Moments that matter



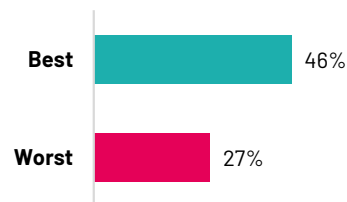
Expectations



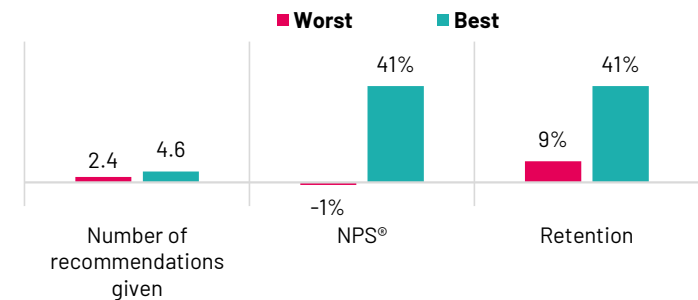
Forces of CX



Emotional attachment



CX KPIs & Outcomes



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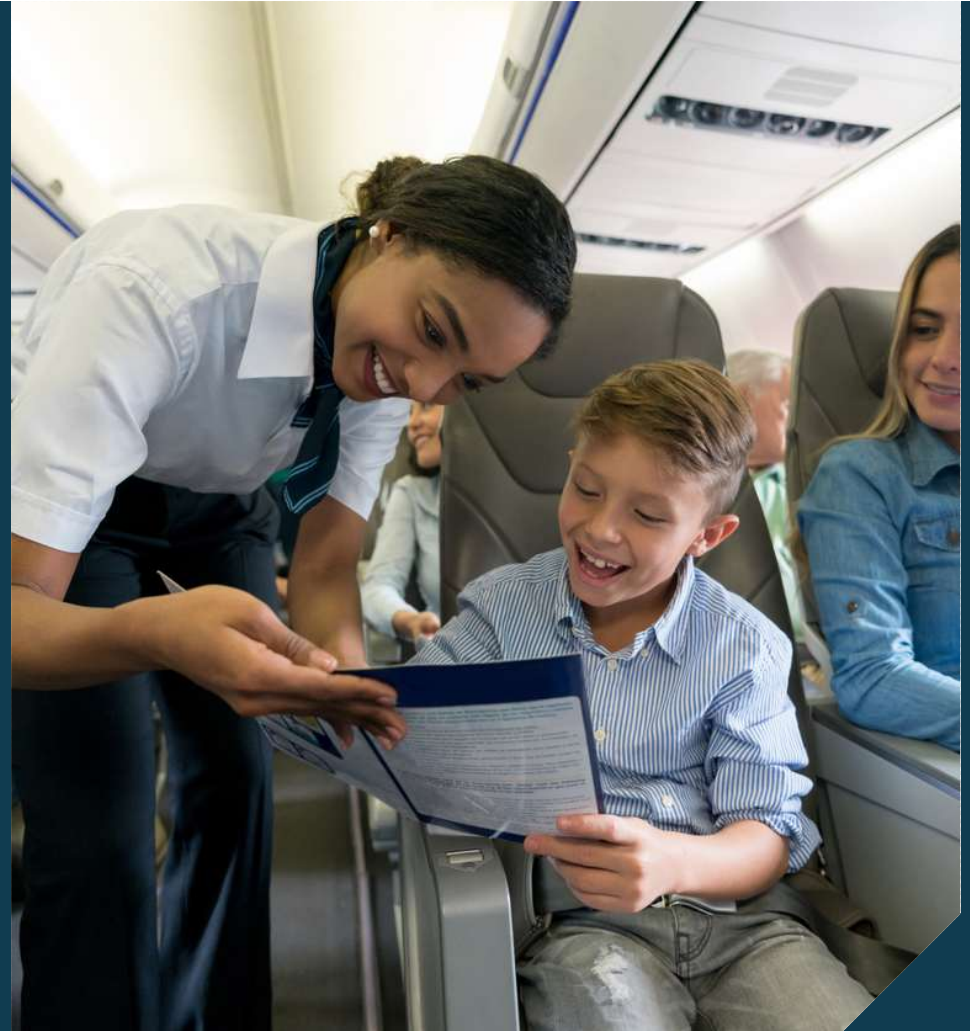
Summary



What sets best and worst performing sectors apart is the ability to elevate the experience beyond basics by meeting customer's emotional needs – leading to higher impact on customer outcomes and acquisition.



A better and more memorable experience that meets or exceeds expectations leads to a stronger performance on Forces of CX and higher emotional attachment, which in turn positively impacts CX KPIs, customer lifetime value, and acquisition potential.



CONCLUSION

Key Takeout


Delivering a better experience will make customers **choose your brand** and some will be willing to **pay more** for it.

While metrics such as NPS and CSAT are used as CX indicators, the data shown clearly reinforces the importance of **emotional attachment** as crucial for CX success.

Our analysis identifies the **key experiential and emotional building blocks** of CX success.

Overall, the CX market is mainly driven by hygiene Forces of Certainty and Fair Treatment – highlighting the importance of **getting the basics right** before trying to elevate or differentiate the relationship.

But what sets best and worst performing apart is the ability to **elevate the experience beyond basics**.



A better and more memorable experience that meets or exceeds expectations leads to a stronger emotional attachment, which in turn positively impacts CX KPIs, customer lifetime value, and acquisition potential.

Brands need to deliver on their promise in order to drive growth

It's NOT just about what we "SAY" but also what we "DO"

What the brand **stands for**?

What is the **brand purpose**?

How do we make **people's lives better**?

What **pain points** do we address?

**BRAND
PROMISE**

GROWTH

**CUSTOMER
EXPERIENCE**

Does the experience **live up to the expectation**?

Is the experience **different** from what it has **promised**?

Is my experience **better/worse than competitor's**?

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THANK YOU!

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