

Survey

What makes a Great Customer Experience?

May 2016



About the Survey

“Don’t think about the cheapest way to do it or what’s the fastest way to do it, think what’s the most amazing way to do it”
- Richard Branson

Brandcell Consulting has conducted a survey to investigate what consumers believe are the qualities of great service.

The online survey done among 52 individuals through a surveymonkey questionnaire revealed the way services make Lebanese consumers feel and the sectors that provide the best and worst customer service.



About Customer Experience

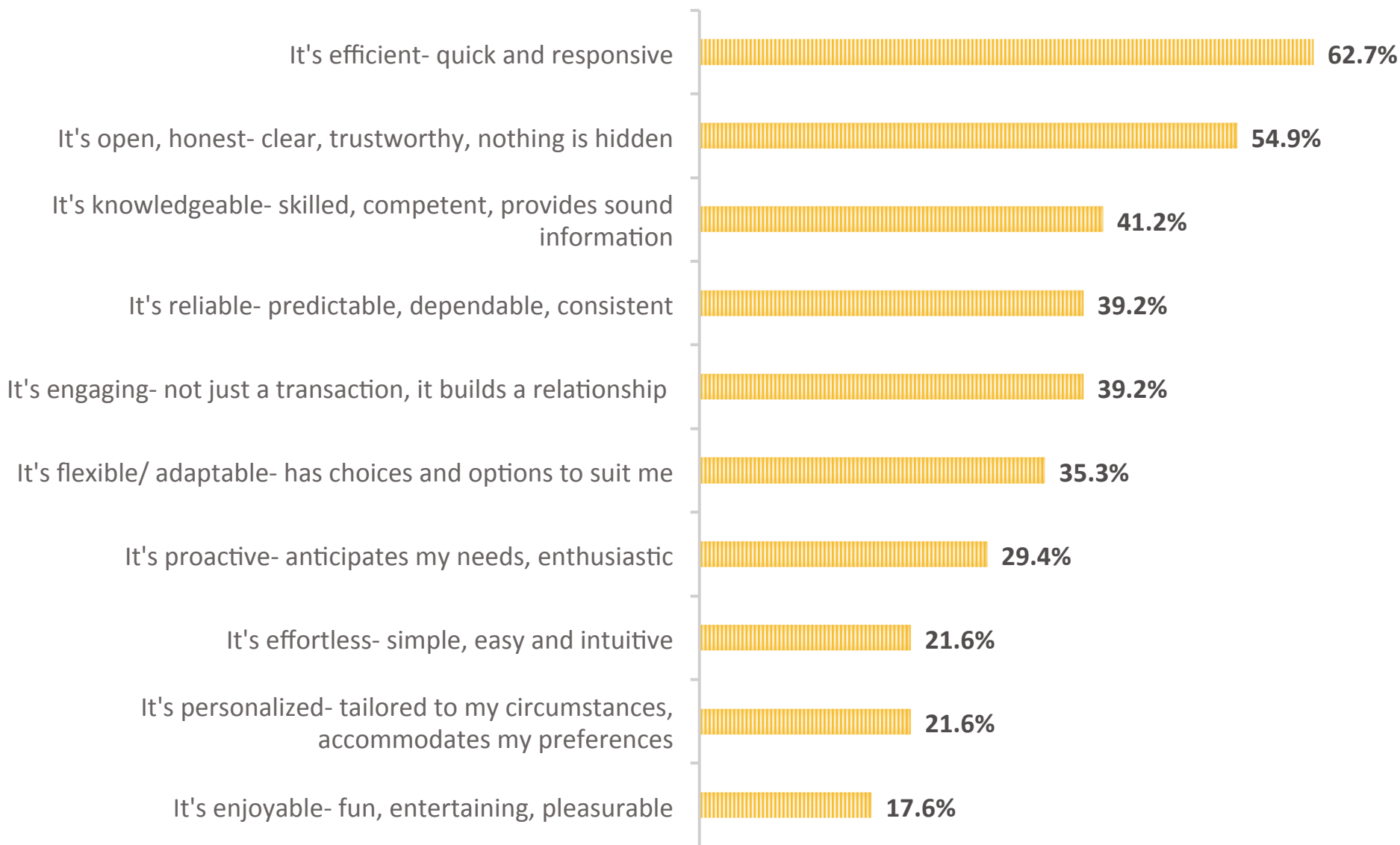
How is customer experience defined?

Customer experience is defined as the product of an interaction between an organization and a customer and how the customer stays connected.

Why is Customer Experience so important?

In summary better customer experience leads to increased revenues, greater likelihood of recommendations, process efficiencies and increased traffic and loyalty.

Q1. What's most important to you in the way a company provides or delivers its service and customer experience? (For instance, through a member of staff, a call center, a website, a retail store etc.)



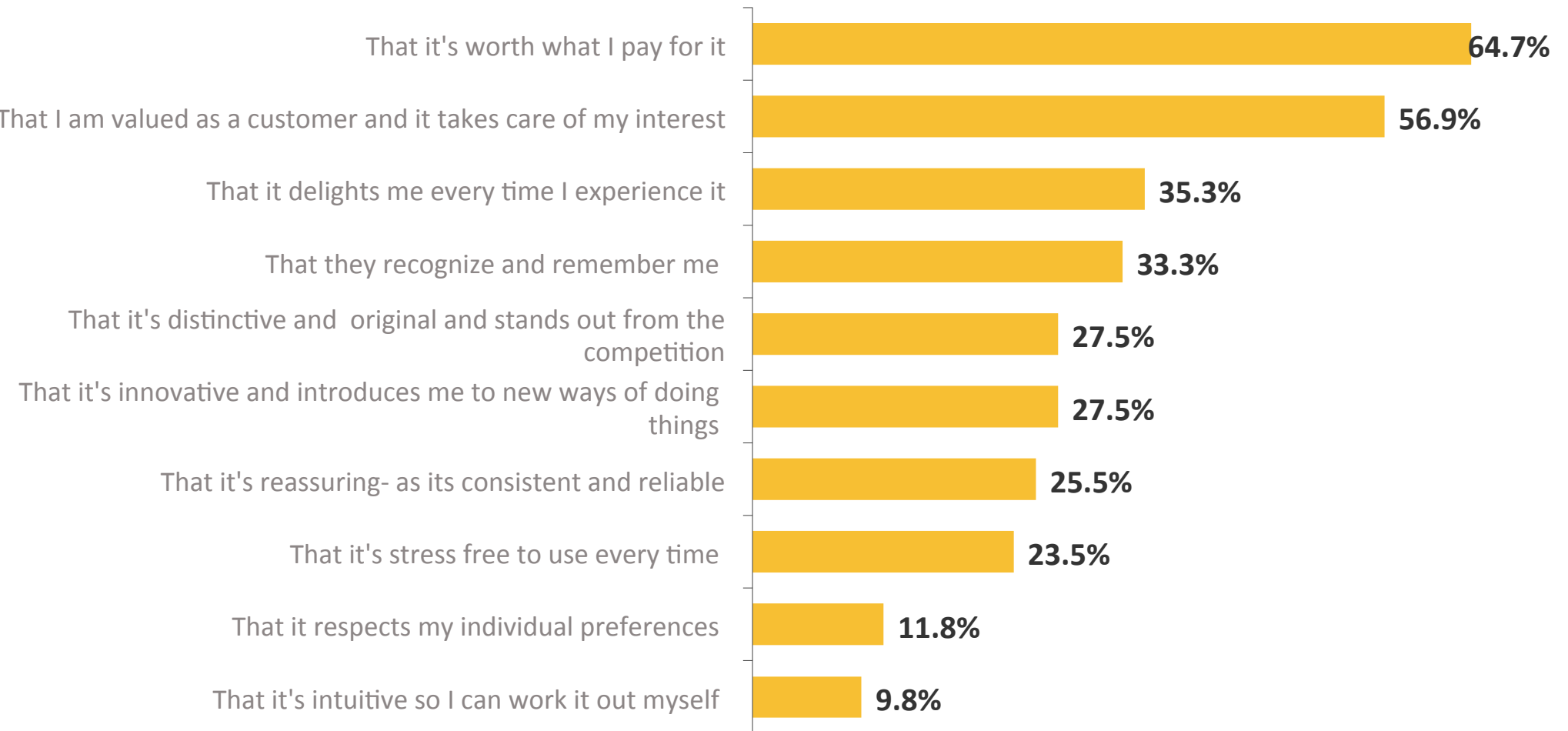
Main Findings

- Efficiency, quickness, and responsiveness emerged as the most important elements of a great service (63%). Moreover the speed & instantaneous aspect of service is becoming a key customer requirement in the tech world of today.
- Transparency and Honesty were mentioned as the second most important element (55%) and **this reveals the need for a customer experience based on a more trustworthy relationship and not on false or inflated promises.**

Key take out:

This reveals that customers are still asking to get the basics right or what we call the MVS (minimum viable service) properly fulfilled by companies/brands offering.

Q2. When you interact with a brand/company, how would you like the experience to make you feel?



Main Findings

- Respondents stated that more than anything a service should be ‘worth what they pay for’ (65%), closely followed by making them feel ‘valued as a customer’ (57%).
- On another hand, customers expressed interest for differentiated and original experiences (28%) that would “keep on delighting and surprising them every time”(35%).

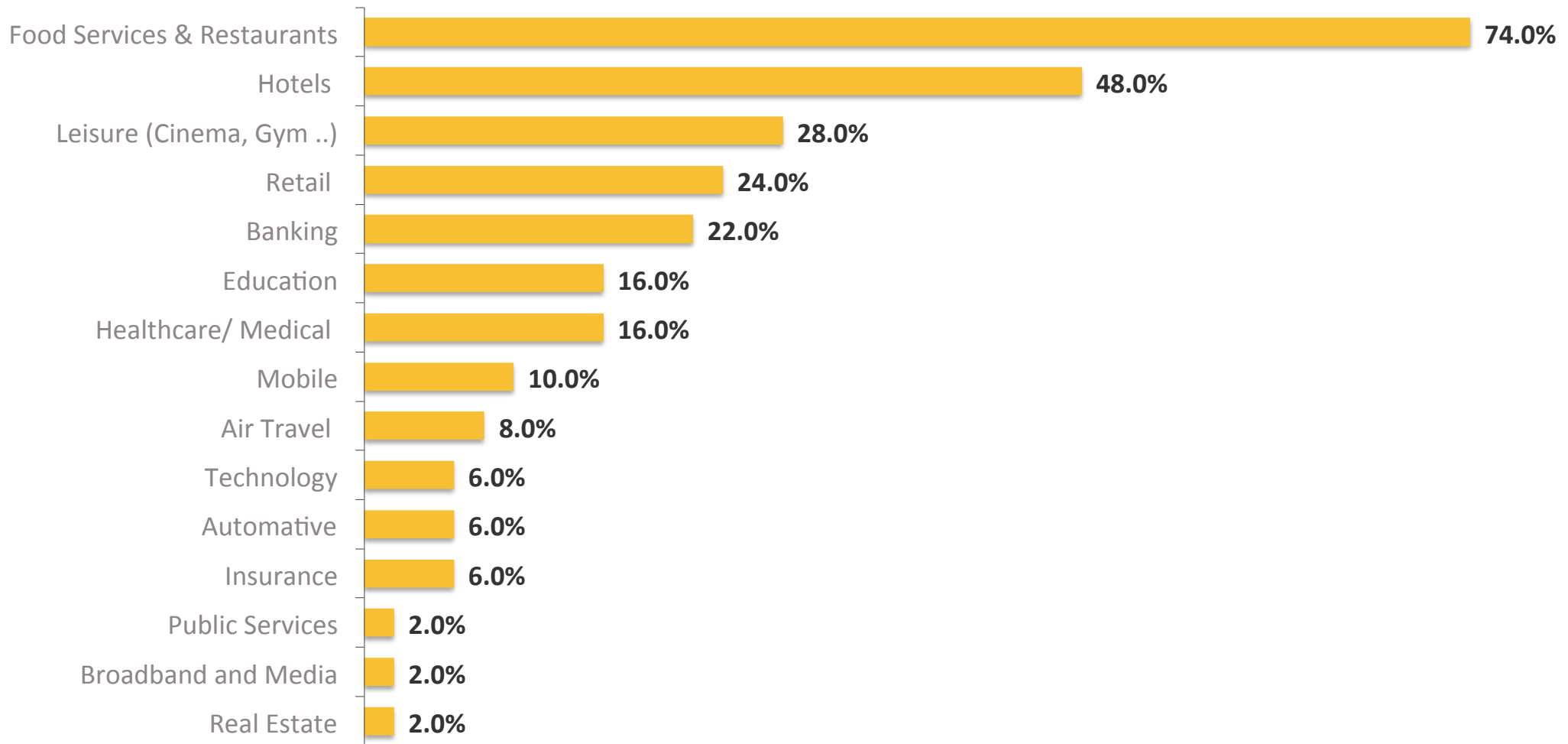
Key take outs:

Customers are watchful concerning the concept of *value* on rational & emotional levels (value for money + value me).

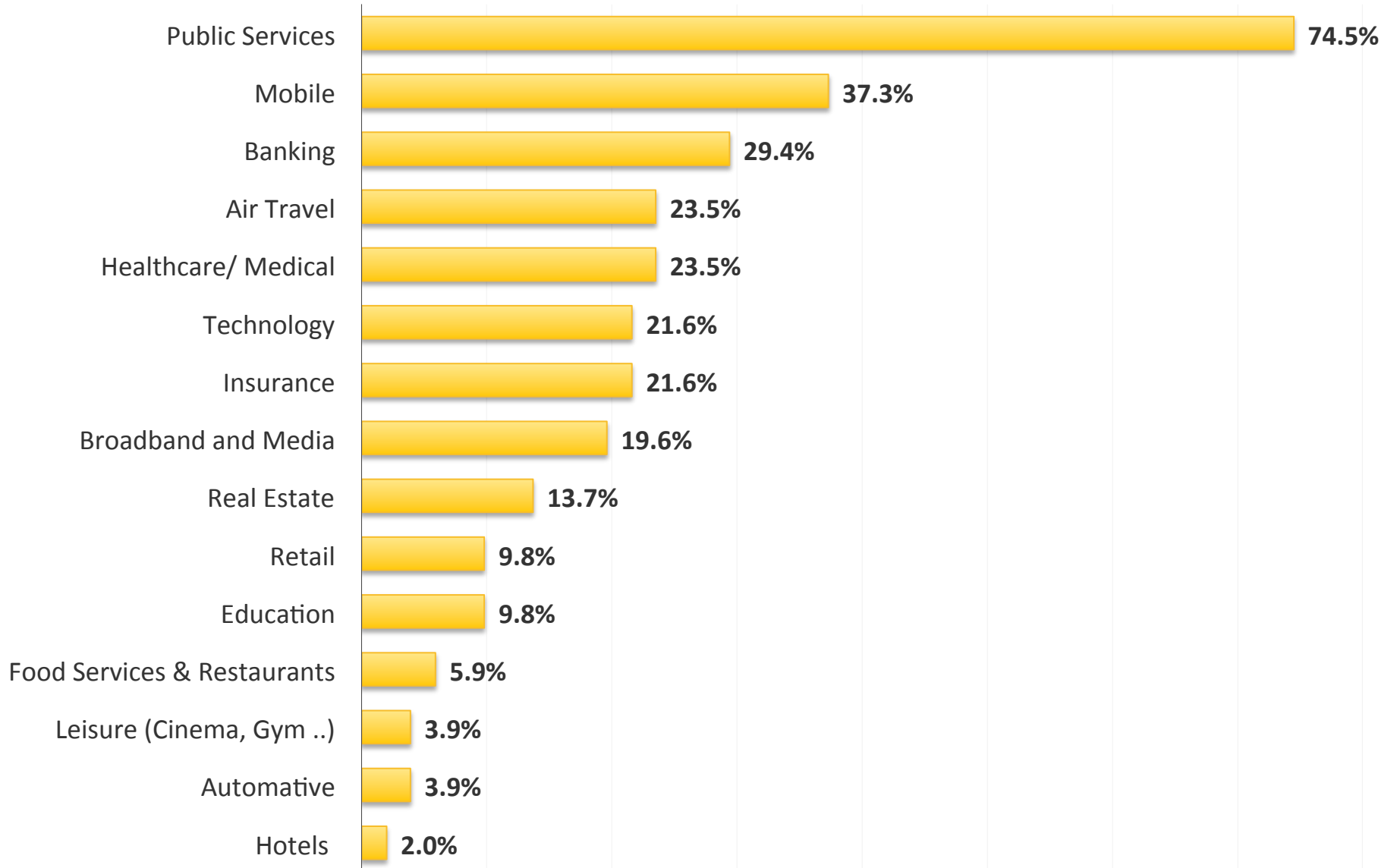
Fear of poor ‘return on their spending’ is mostly related to the lack of trust in the fair & transparent pricing.

Beyond being reassured on the true value they pay, they now aspire to and demand more *engaging, personalized & delightful experiences*.

Q3. In your opinion, Brands from which sectors in Lebanon provide the best service and customer experience overall?



Q4. Brands from which sectors in Lebanon provide the worst service and customer experience overall?

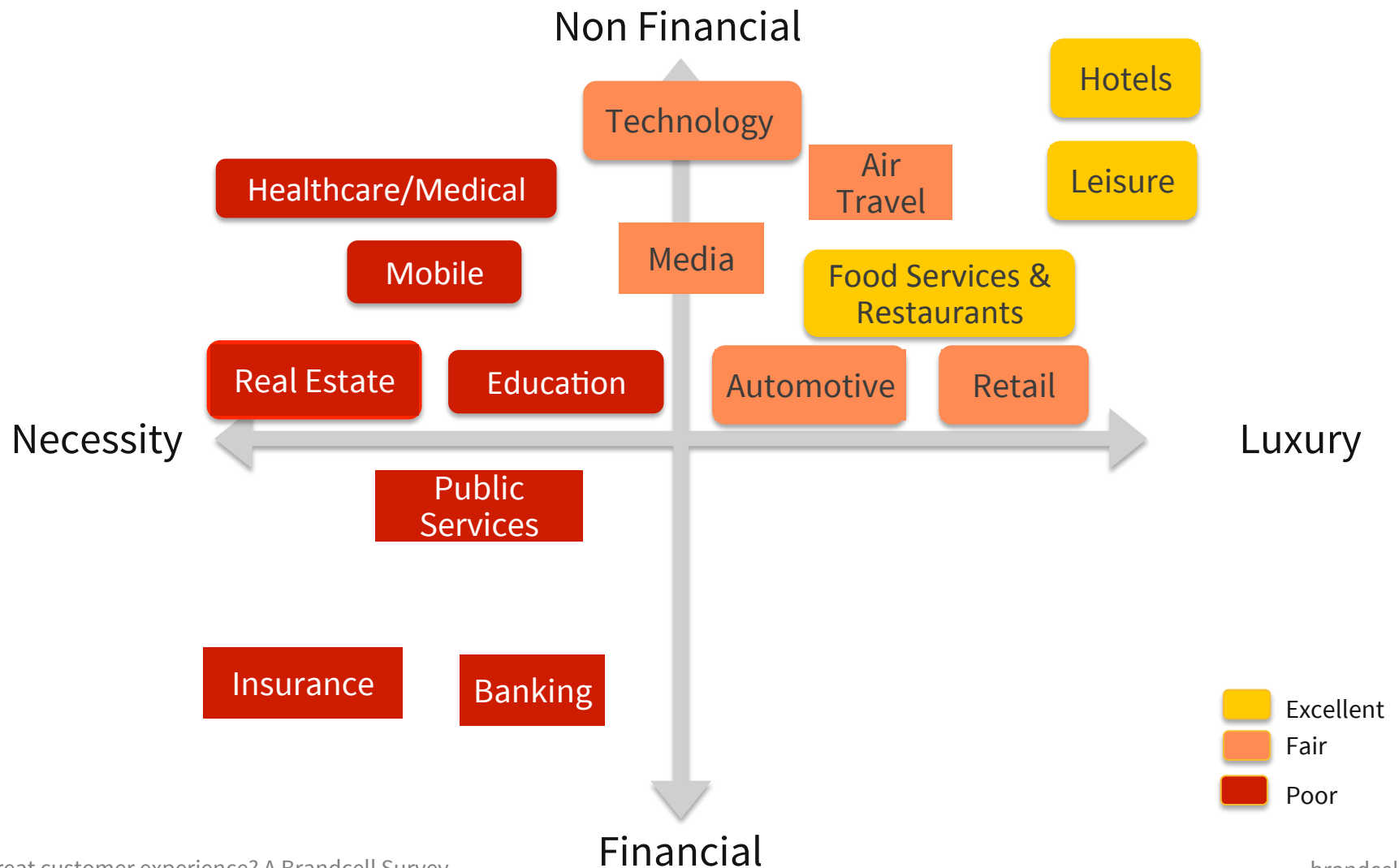


Main Findings

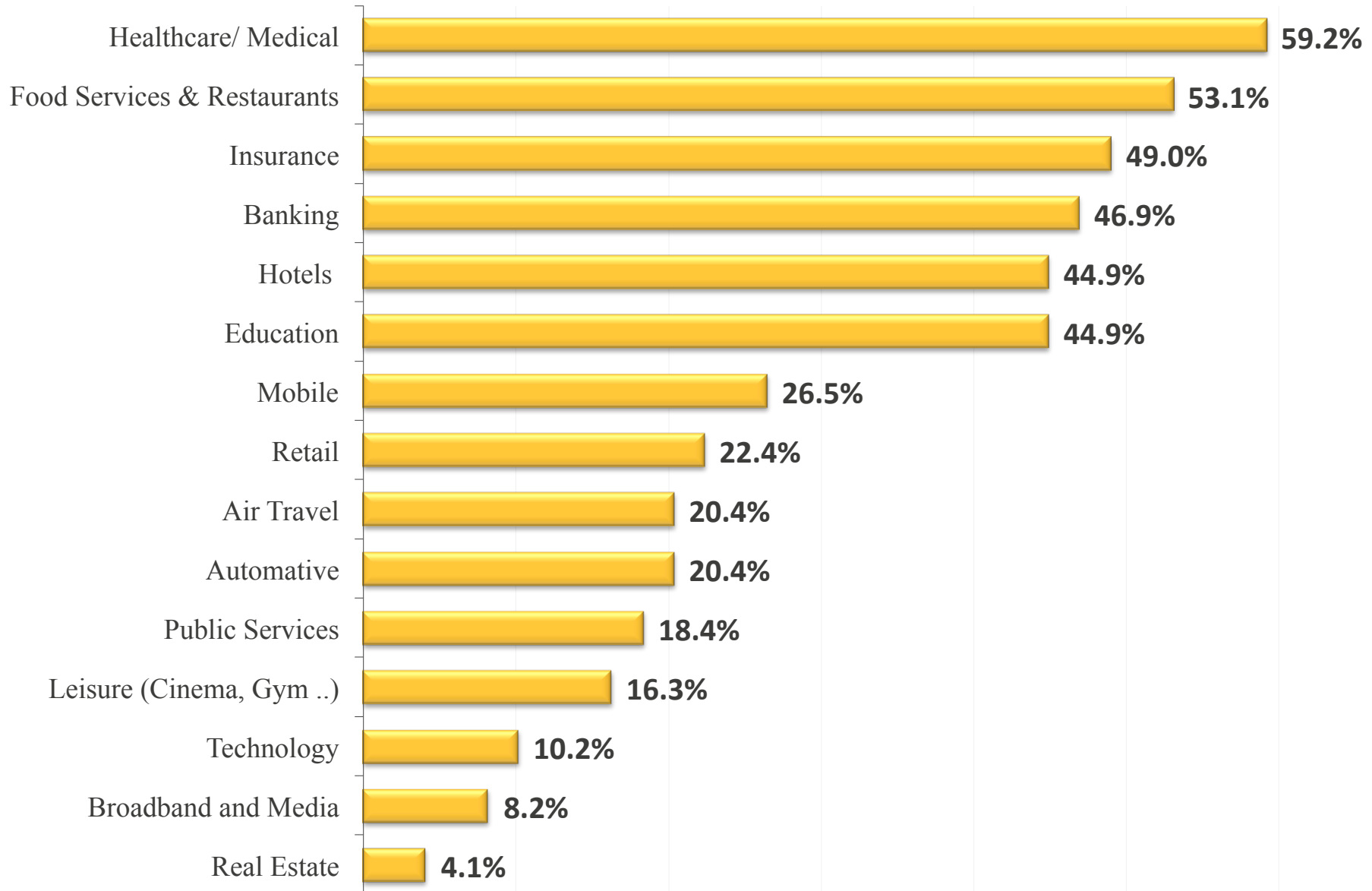
- **Lebanese hospitality industries retained their lead in the top 3: Horeca (74% & 48%), Leisure (28%) and Retail (24%).** This is explained by the reputed Lebanese expertise in these sectors. In addition these 3 sectors are associated with pleasurable experiences, pride and emotions.
- Participants overwhelmingly agree that the Public sector provides the worst CX among all sectors, followed by Mobile and Banking. This is clearly related to the prevailing government-deficient monopoly which tends to care less about demand since they control supplies &/or highly government-regulated sectors (banking) who mostly rely on media communication for Brand differentiation rather than improving the CX.

Main Findings (cont'd)

Moreover, we noticed that all sectors offering a service that is considered as basic necessity by the customer are getting very poor satisfaction ratings.



Q5. In which of these sectors in Lebanon does the quality of service and customer experience you receive from companies matter most when choosing a provider?

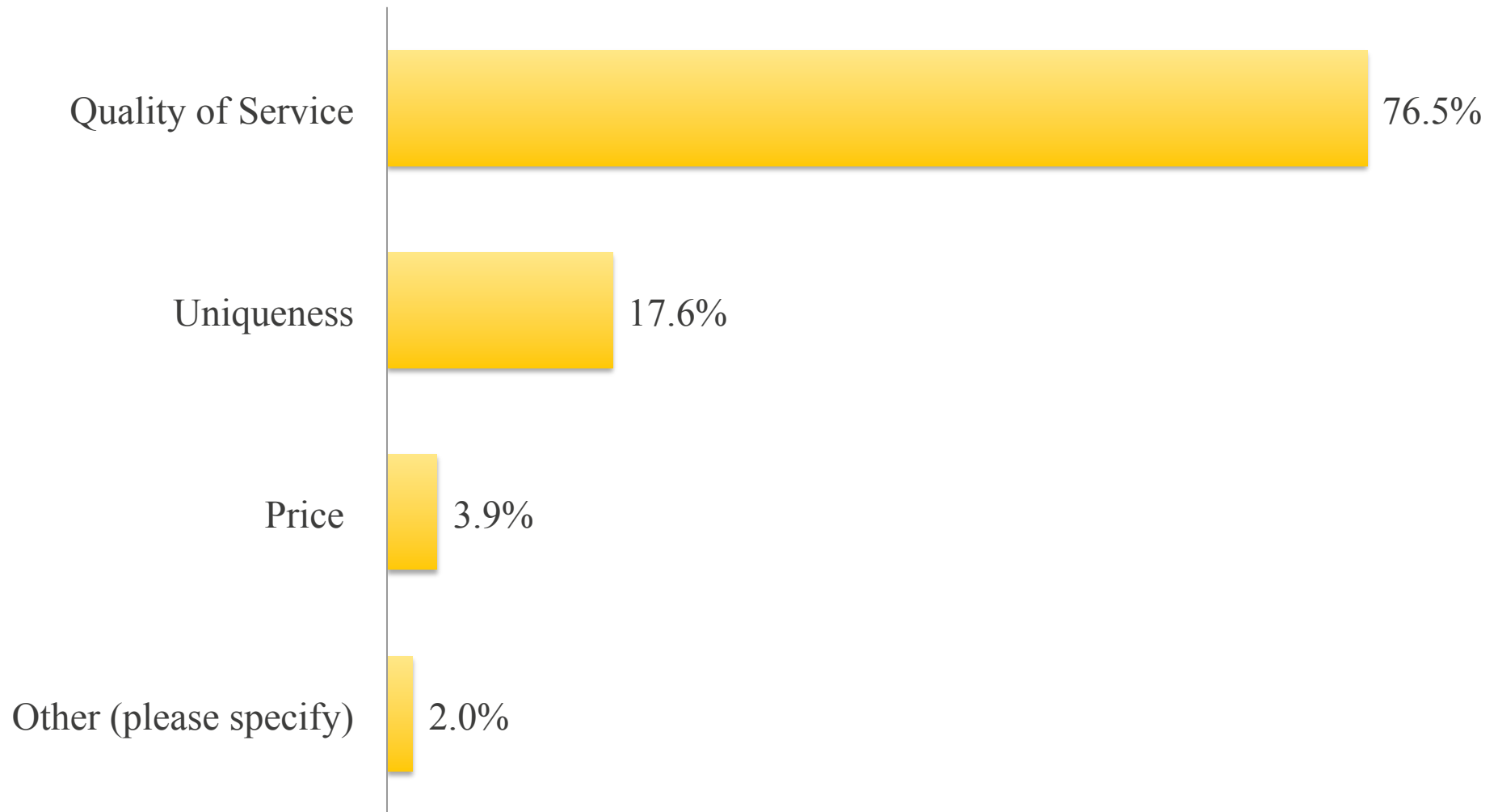


Comparative Matrix between what matters for the participants VS what satisfies them.

This Table demonstrates the top 6 most important sectors for participant and how they are perceived in terms of best or worst service.

Sectors	Quality of Service Matters	Service Assessment (Best/Worst)
1-Healthcare/ Medical	59%	24% Rated among the worst services V/s 16% consider it amongst the best
2- Food Services & Restaurant	53%	74% Rated as the best service V/s only 6% consider it amongst the worst
3- Insurance	49%	22% Rated among the worst services & only 6% rate it amongst the best.
4- Banking	47%	30% Rated among the worst services & only 22% rate it as amongst the best
5- Hotels	45%	48% Rated among the best service
6-Education	45%	16% Rated among the best service

Q6. What would make you most likely to recommend a service to a friend?



Main Findings

By a considerable majority, participants cited 'Quality of service' as the key factor followed by uniqueness.

Key take out:

This is very significant as it validates the importance for brands to get their customers' 'service experience' right as the traditional product/price proposition is no longer good enough.

Brandcell key conclusions

- ❖ Lebanese companies are still relying to very high degrees on Human interactions to deliver their P&S. This is why attributes such '*efficiency, consistency, knowledgeability & reliability*' are today the most important for customers.
- ❖ As digital natives consumers number grows, the availability of digitalized & automated services will shift the demand towards '*instant, customizable, intuitive & delightful experiences*' which will become the norm for brands.
- ❖ Radically enhancing Customer Experience mainly in the sectors that matters most to customers daily lives like health, banking and insurance as well as keep improving the Horeca will allow a significant satisfaction leap and provide a key differentiation on brands level.
- ❖ Several sectors have significant opportunities as well in improving their customer experience like Retail, Air Travel, Automotive and Education.

About Brandcell

Brandcell is the first holistic business design consulting with services that span from understanding the Brand value proposition to delivering it in a seamless way, in & out of the organization.

Brandcell purpose is to fuel passion for Innovation, different thinking & Knowledge in progressive organizations & people who want to thrive in an ever-changing world.

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