



KANTAR

When Good Isn't Good Enough

Rethinking CX for Brand Growth

At a glance

What our ExperienceEvaluators studies revealed about CX and brand growth

Across industries and geographies, brands deliver strong customer experiences yet fail to grow. Kantar's ExperienceEvaluators studies across five markets reveal why: functional excellence has become table stakes.

New evidence further shows the commercial power of experience

2.5x

"Brands who improve their customer experience are far more likely to significantly increase their market share."

In Australian financial services, challenger banks outperform established players despite smaller footprints. In the UK, digital grocers are growing the fastest, delivering the most uniquely effortless experiences.

In German fashion retail, online disruptors win against traditional retailers doing the basics well. The common thread lies in experiences that are both Meaningful and Different, which build brand equity to drive commercial growth. Satisfaction alone simply does not achieve this.

Source: Kantar BrandZ. Analysis of top growth brands vs bottom growth brands on BrandZ Total Experience Index over two years based on 10,000 brands. Total Experience Index is a derived measure which shows how well a brand maximises repeat usage and minimise rejection relative to competitors accounting for brand size. Those who grow BrandZ Experience Index most are 2.5x more likely to significantly increase their market share.

The Growth Puzzle

When satisfaction rises, but market share does not

Customer satisfaction scores are rising across industries. Yet market share continues to shift dramatically between competitors.

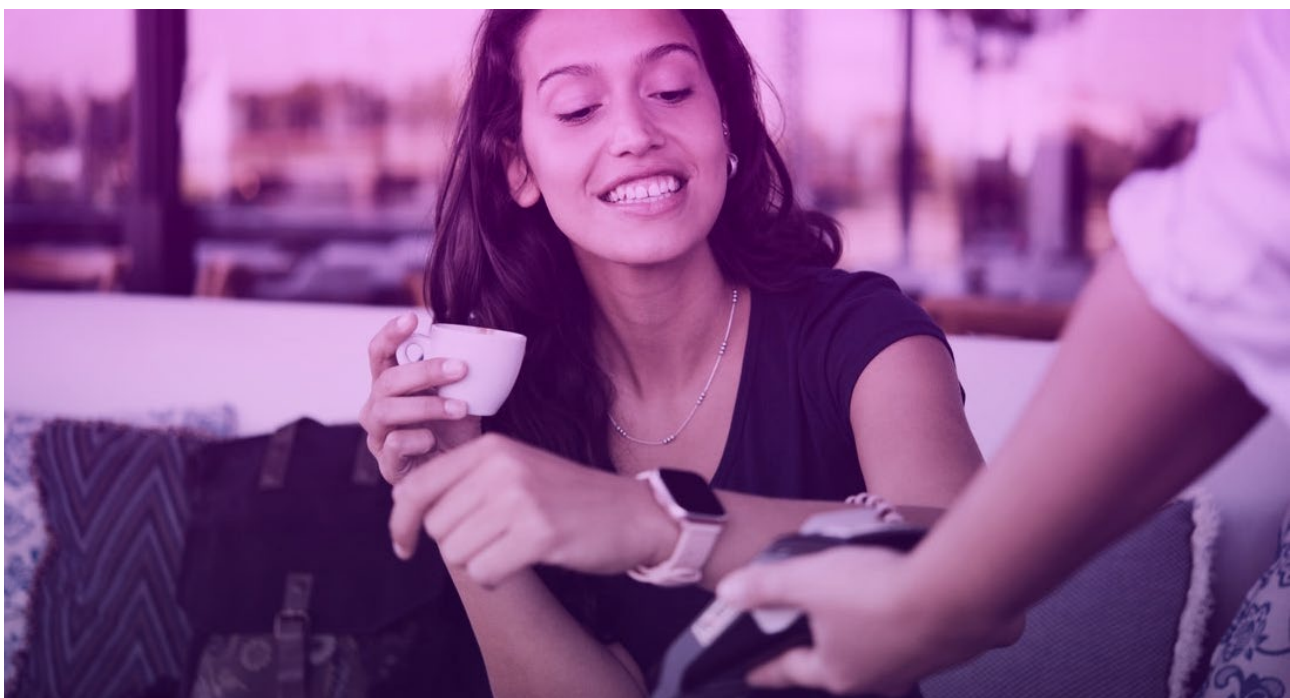
Most brands measure customer experience through satisfaction metrics alone. They optimise for NPS, track CSAT, and celebrate incremental improvements. But these measures capture only half the picture. They tell you whether customers are satisfied; they don't tell you whether your experience is building brand equity.

Kantar's ExperienceEvaluators solution tested this hypothesis across five markets: financial services in Australia, fashion retail in Germany, grocery retail in the UK, banking in Malaysia, and quick-service restaurants in the United States. The findings were consistent: brands delivering good experiences often struggle to grow, while those creating Meaningfully Different Experiences (MDX) capture disproportionate value.



The Satisfaction Trap

Why doing the basics well isn't enough



In Australia's financial services sector, the Big 4 banks score well on trust and product range. Their experiences are competent, reliable, and largely interchangeable. They meet expectations without exceeding them.

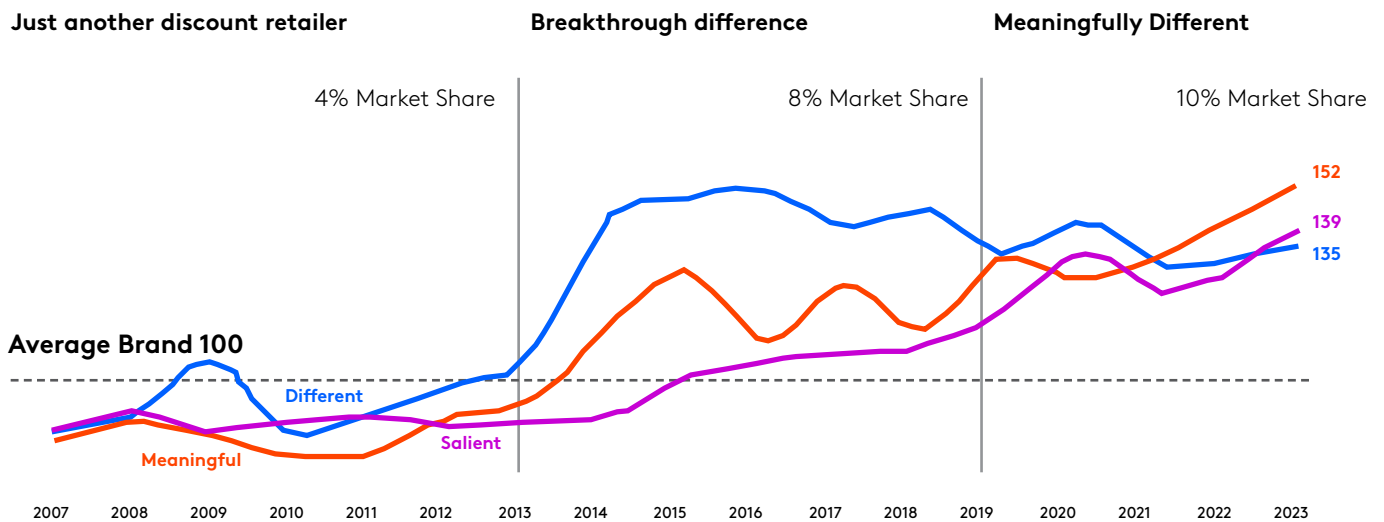
Yet ING is different. The challenger bank emerged as the clear leader from a MDX perspective, outperforming both established banks and other challengers on Experience Power, Kantar's metric that shows how strongly customer experience drives brand growth.¹ ING's experiences were rated highly for ease and trust, but also for distinctiveness and emotional connection.

The contrast is instructive. While Westpac scored highly on ease of use, its perception of Difference lagged ING and UBank. UBank's app experience achieved 92% top-box ratings; its website followed at 83%.¹

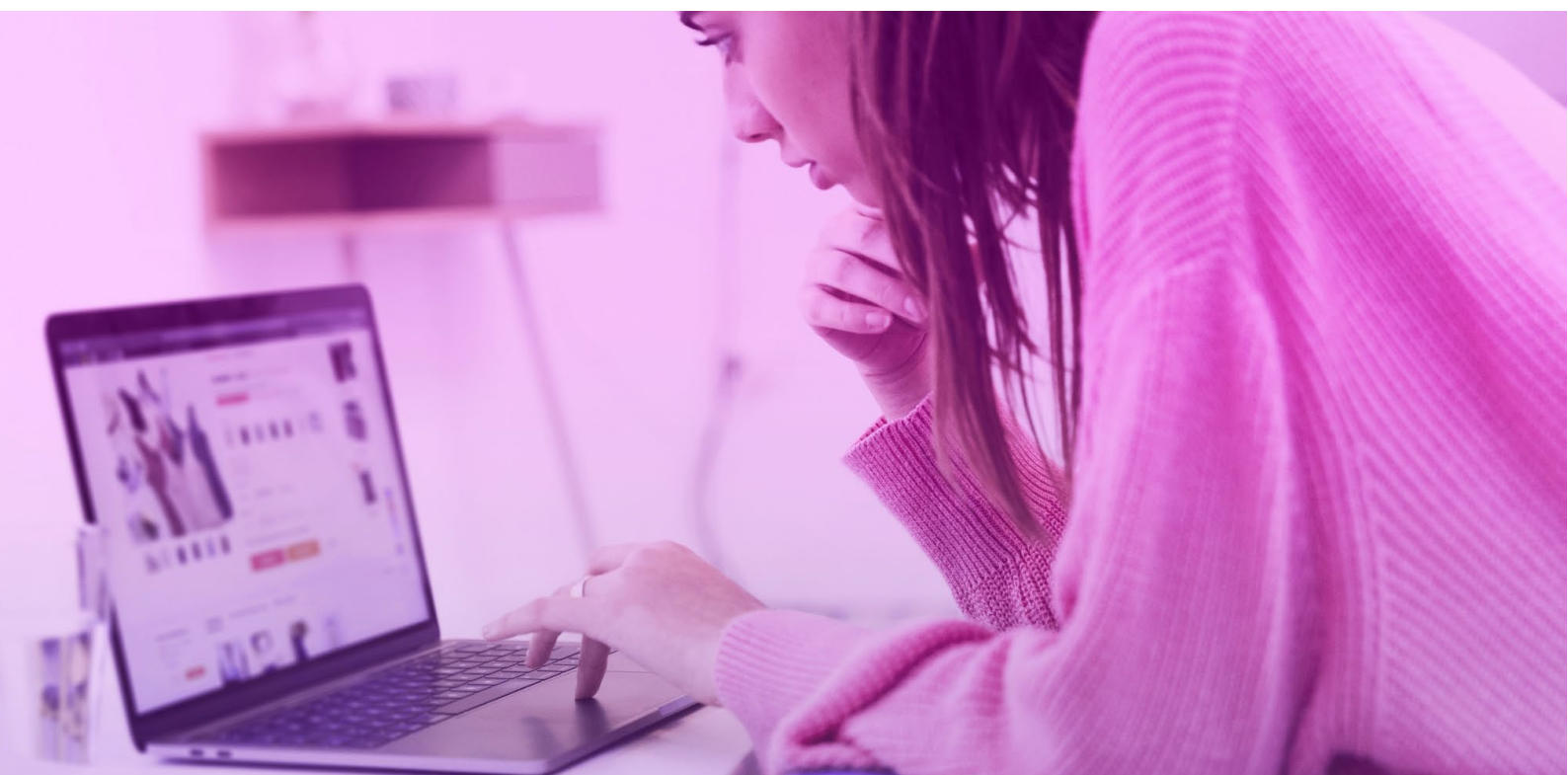
These digital challengers carve out distinct positions through focused propositions and purpose-built experiences.

German fashion retail shows the same pattern. Traditional retailers face pressure from online players like Zalando and About You, who stand out through unique customer experiences and innovation. Chinese platforms including Shein and Temu add further competitive intensity. Doing the basics well maintains parity; it doesn't create growth.

You can be good at CX and still not grow your brand if your experiences don't reinforce what makes you unique.¹



Ranking of UK retailers results for Aldi compared with Tesco, Asda, Sainsbury's, Morrisons, Jan 2007-2023



Meaningfully Different Experiences (MDX) explained

Kantar's MDX methodology applies proven brand metrics to customer experience analysis at both the relationship level (assessing experiential memories) and the transactional level (focusing on specific touchpoints.) The objective is not only to identify opportunities for enhancing these interactions, but also to understand how they reinforce the brand's distinctiveness.

MEANINGFUL captures whether experiences meet customer needs effectively, operate with ease, and build emotional affinity.

DIFFERENT captures whether experiences feel authentic, unique, and inspiring.

Both dimensions matter. Meaningful without Different produces forgettable experiences. Different without Meaningful produces gimmicks. The combination builds lasting brand predisposition.

Brands that achieve strong predisposition through MDX see **2x higher price paid, 4x higher volume share, and are 9x more likely to grow value share than brands with weaker predisposition.**⁵

MDX IN PRACTICE: UK GROCERY

UK grocery's Big 4 - Tesco, Sainsbury's, Asda, and Aldi - have led in market share since 2022 but digital-only retailers are rising fast. Amazon Fresh and Ocado saw the strongest growth between 2024 and 2025 with 40% and 25% increases in use.

These brands set the bar for online grocery experiences. Amazon Fresh, followed by Ocado, were the two highest performers for Meaningful and Different Experiences in our recent ExperienceEvaluators study thanks to consistent digital innovation and strong delivery performance.

In contrast, Tesco is ubiquitous. They remain the first choice for 45% of consumers compared to 6% for Ocado. Tesco are highly Meaningful and lead the way in overall brand strength. But weaker perceptions of Difference limit its pricing power and ability to charge a premium. Ocado and Amazon Fresh achieve significantly higher pricing strength by 11% and 23%, respectively.

This pattern appears across categories. In the US QSR sector, brands with lower demand power can still lead in Experience Power when they deliver MDX - helping protect margins even in highly price sensitive categories where loyalty is weakening and price-driven purchasing has increased.



WHAT ARE MEANINGFULLY DIFFERENT EXPERIENCES?

We have defined six drivers of Experience

MEANINGFUL

Meets people's needs and they feel emotionally connected to it

Effective

Providing a service that delivers on needs, and doing what you promise

Easy

Being easy to do business with, creating experiences that feel effortless and enjoyable

Affinity

Creating experiences with empathy, so customers feel cared for, building connection and trust

DIFFERENT

Perceived as a trend setter for its category, as unique

Authentic

Consistency, fairness and transparency and being true to the expectations of your brand

Unique

Going beyond, sensorial, distinctive, and offering something your clients can't get elsewhere

Inspiring

Magical moments that delight with the unexpected, going above and beyond where it matters



Where Experience Matters Most

Touchpoints that build brand equity

Not all touchpoints contribute equally to MDX. Our ExperienceEvaluator studies revealed that experience touchpoints consistently outperform exposure touchpoints in building brand equity among customers. In Malaysia's banking sector, 58% of brand memories are created by experience touchpoints rather than advertising or other exposure channels.² Mobile apps emerged as the most influential touchpoint, followed by websites. The functionality, imagery, wording, and content of these digital channels have the single biggest impact on how customers perceive banks.

This reflects a broader shift. As the Malaysia pilot observed, mobile app is now the fundamental touchpoint that allow customers to fulfil the individual financial needs. As this trend develops, banking is becoming effortlessly woven into the rhythm of daily life.²

Australia's pilot reinforced this finding. ING's digital touchpoints were central to their MDX leadership. **These aren't just functional channels; they're strategic brand assets.**

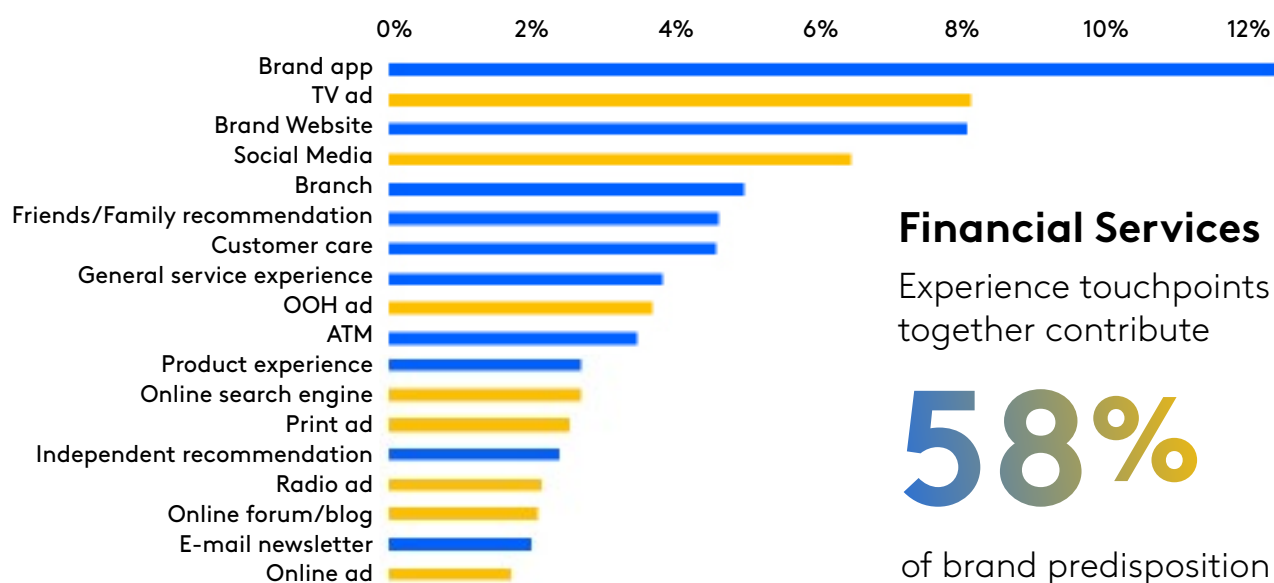
The pattern differs by sector, but the principle holds. In both UK grocery and German fashion retail, store layout and in-store services are the touchpoints with greatest influence on MDX for physical retailers.³

For traditional retailers competing against digital-native players, creating distinctive in-store experiences is the primary lever for differentiation.

In quick-service restaurants, food quality and in-store touchpoints carry disproportionate weight in building MDX.⁴ Experience touchpoints have higher impact on brand equity than exposure touchpoints like advertising or sponsorship.

The objective is not only to identify opportunities for enhancing these interactions, but also to understand how they reinforce the brand's distinctiveness.²

TOUCHPOINT (PAID, OWNED AND EARNED) CONTRIBUTION TO BRAND PREDISPOSITION



■ Experience touchpoints
■ Exposure touchpoints

Data is based on our review of the influence of all touchpoints on brand strength across all Financial Services. Based on 7 Connect Projects in 2022

The Differentiation Opportunity

Where brands are winning

The studies identified clear patterns among brands creating Meaningful Difference.

Digital challengers in financial services (ING, UBank in Australia) build experiences that reflect their brand propositions. They're not trying to match established banks on breadth; they're winning on focus and distinctiveness.

Online fashion retailers (Zalando, About You in Germany) combine unique customer experiences with innovation. For physical retailers, the response isn't to abandon stores but to make them distinctively valuable through personalised advice, exclusive events, and innovative store concepts.

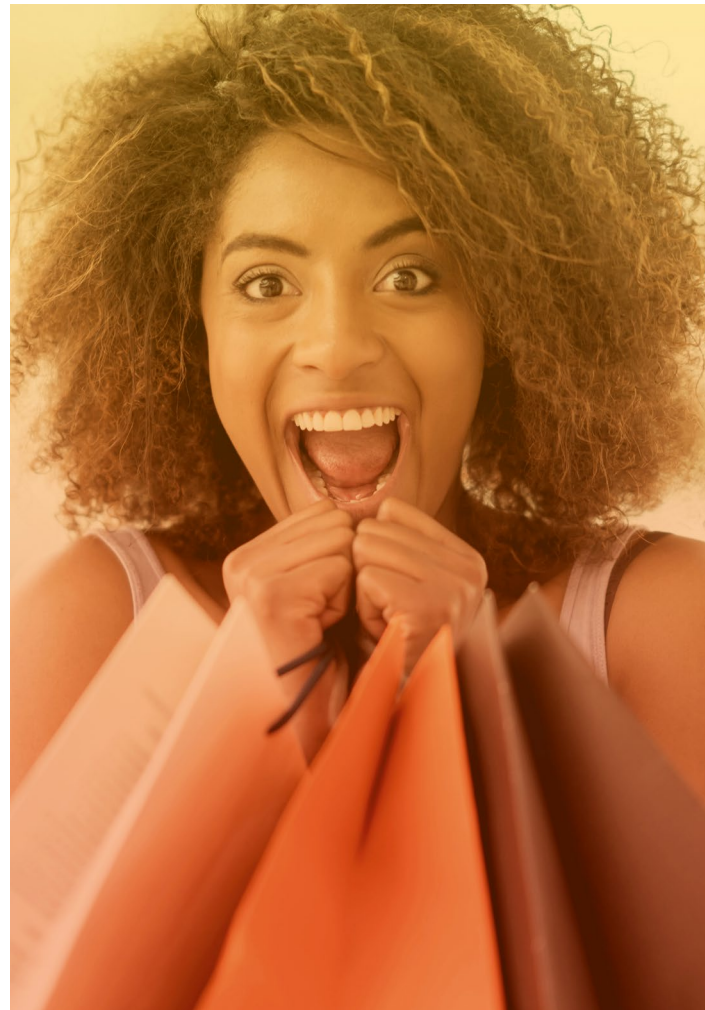
Emerging digital grocery retailers (Amazon Fresh and Ocado in the UK) remain small but are growing fast with a singular focus on how they deliver their services through an app or website. But the physical store is not a burden for traditional grocers and remains the most convenient way to shop for most consumers. Their challenge is to deliver quality products at competitive prices to ensure customers return and are willing to pay a slight premium.



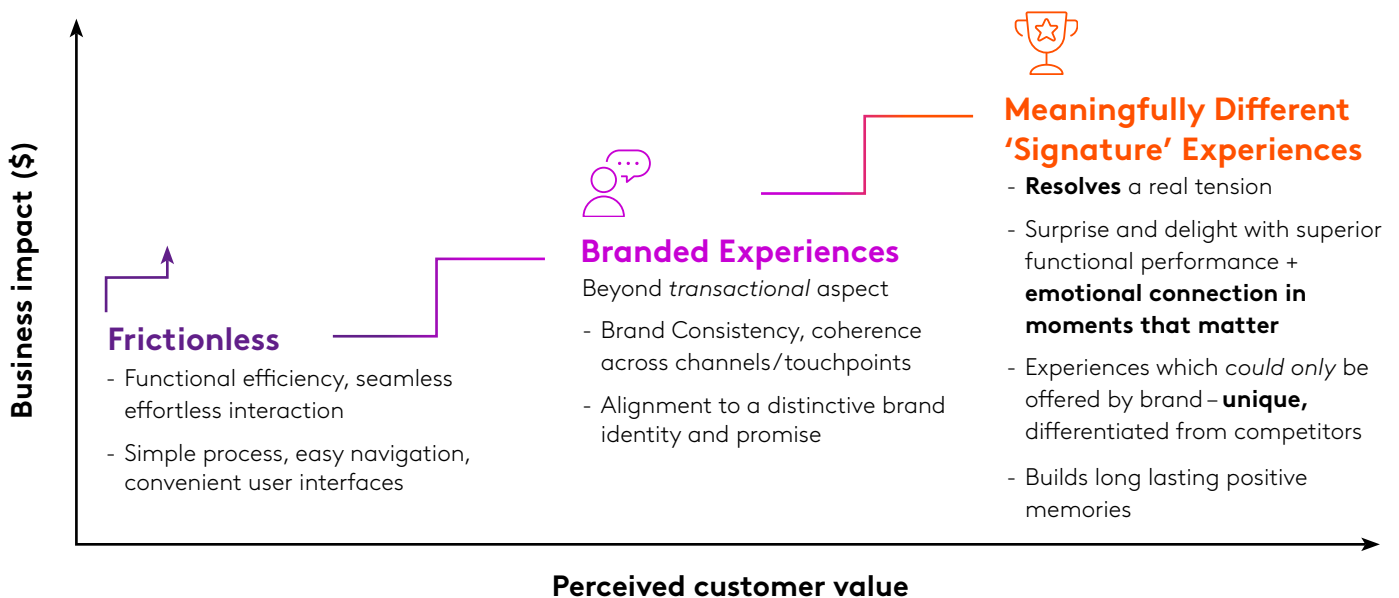
Smaller, focused brands often outperform market leaders on experience Differentiation. Rather than following larger brands who set the tone for what's typical, they find ways to disrupt category conventions.

The common thread is intentionality. These brands design experiences to reinforce their distinctiveness, not merely to satisfy functional requirements. They move beyond "frictionless" to create signature moments that customers remember.

Large, established brands often struggle here. They optimise for efficiency and consistency, which produces competent experiences that feel interchangeable. Consistency matters, but consistency alone doesn't create Difference.



GETTING THE BASICS OF JOURNEYS RIGHT IS IMPORTANT, BUT FOR BRANDS TO GROW, WE NEED TO GO MUCH FURTHER



Measure What Matters

How ExperienceEvaluator narrows the gap

ExperienceEvaluator was built to measure what truly drives growth: not just satisfaction, but experience's contribution to brand equity.

The solution incorporates Kantar's MDX methodology to benchmark how brands deliver Meaningful and Different experiences against competitors. It evaluates both relationship-level experiences and specific touchpoints, identifying where to focus improvement efforts for maximum brand impact.

The solution delivers results in as few as four days, built on over 30 years of Kantar's brand equity expertise.⁵

Traditional CX measurement cannot keep pace with competitive dynamics. Brands need agile, actionable insights that connect experience performance to commercial outcomes.

The question facing every organisation is straightforward: does your experience make customers perceive you as genuinely Different? The evidence across these pilots is consistent.

Satisfaction separates acceptable from poor. Meaningful Difference separates market leaders from everyone else.

THREE CAPABILITIES DISTINGUISH EXPERIENCEEVALUATOR FROM TRADITIONAL CX MEASUREMENT:

1

MDX benchmarking against up to 12 competitors, revealing not just how you perform but whether you stand out

2

Touchpoint evaluation weighted by reach and influence, showing which experiences actually build brand equity

3

Competitive diagnostics identifying threats and opportunities in how rivals deliver experiences



Five Principles for Action

What experience-led growth requires

1

Satisfaction is table stakes. Meaningful Difference drives growth. High CSAT and NPS scores don't guarantee brand equity or market share gains

2

Experience touchpoints outweigh exposure touchpoints in building brand predisposition. Digital channels are now primary brand-building assets in most sectors

3

Both dimensions matter. Experiences must be Meaningful (effective, easy, emotionally resonant) AND Different (authentic, unique, inspiring). Either alone is insufficient

4

Challengers win through focus, not scale. Brands that design experiences to reinforce distinctiveness outperform those optimising only for efficiency.

5

Agile measurement is now necessary. Traditional annual surveys cannot keep pace. ExperienceEvaluater provides the speed and depth required to respond to competitive dynamics.



Learn More

To understand how ExperienceEvaluator can reveal your brand's MDX position and identify high-impact improvement opportunities, contact your Kantar representative or visit:

[Customer experience optimisation | Kantar Marketplace](#)

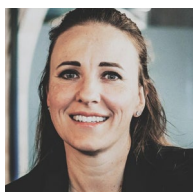
Contact us directly on CX@Kantar.com

Sources

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- 2 Kantar ExperienceEvaluator Pilot Banking Malaysia, 2025
- 3 Kantar ExperienceEvaluator Pilot Retail Germany, 2025
- 4 Kantar ExperienceEvaluator Pilot QSR US, 2025
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- 6 Kantar ExperienceEvaluator Pilot Grocery UK, 2025

Sources

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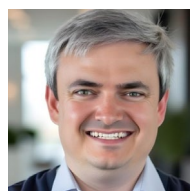
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