



# Customer Leadership Index 2021

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November 2021

**KANTAR**

# Agenda for **today**

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- 1** Rising to the challenge
- 2** The 2021 Customer Leadership Index
- 3** The top 10
- 4** Learnings and insights
- 5** Q&A



**Jon Pickup**  
Group Client Director



**Sarah Bolger**  
Chief Client Officer





# 1

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Customer  
Experience – rising  
to the challenge

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# A **brand** is

1

A recognisable  
'guarantee' of  
quality

2

Instant  
simplification  
for decision  
making

3

An expression  
of certainty  
and reliability

In uncertain times, brands have an opportunity to provide **confidence** and **reassurance** where there is otherwise little.



# The **impact of COVID-19** on businesses

**72%**

of businesses  
worldwide experienced  
downturn

**93%**

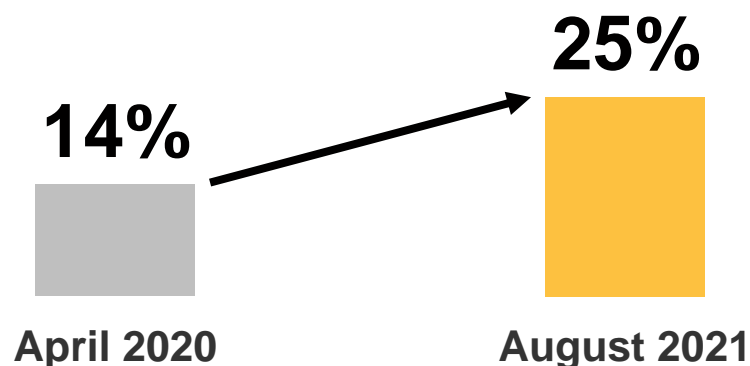
of the C-suite expect  
consumer behaviour  
to change

# Our own data shows that behaviour has changed and continues to do so



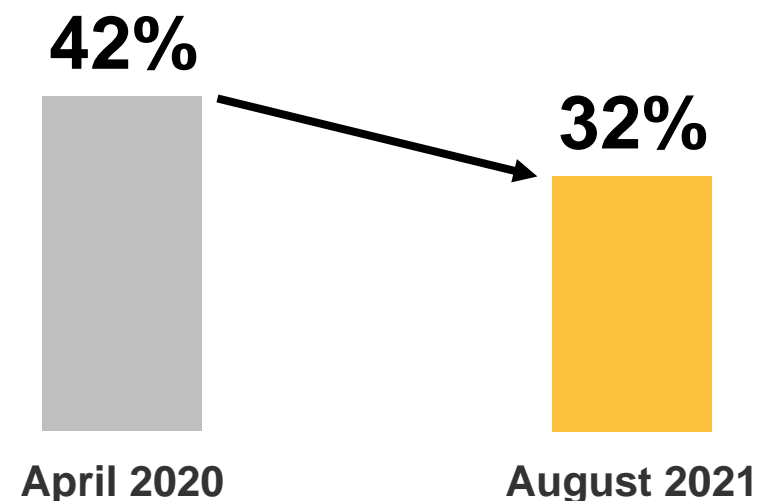
## Increase in use of digital channels / online shopping

% spending more online than they did before the pandemic



## Evolving attitudes towards spending

% spending less or looking to scale back spending





And yet even with  
this shift to digital,  
consumers are  
still looking for  
**a personalised  
experience**

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**71%**

Expect companies to  
deliver personalised  
interactions

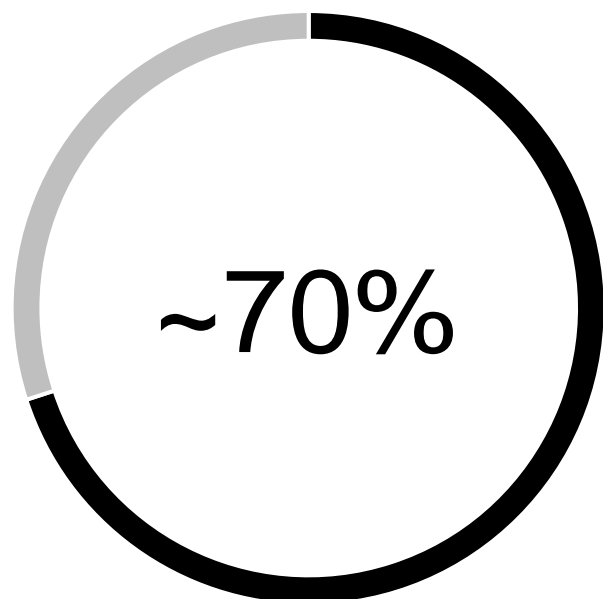
**76%**

Get frustrated  
when this doesn't  
happen

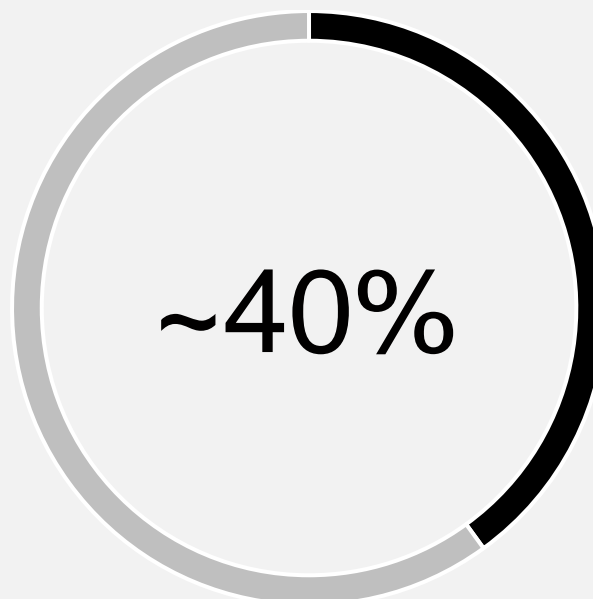
**But in many industries customers have had no personal contact with their brands in the last 12 months**



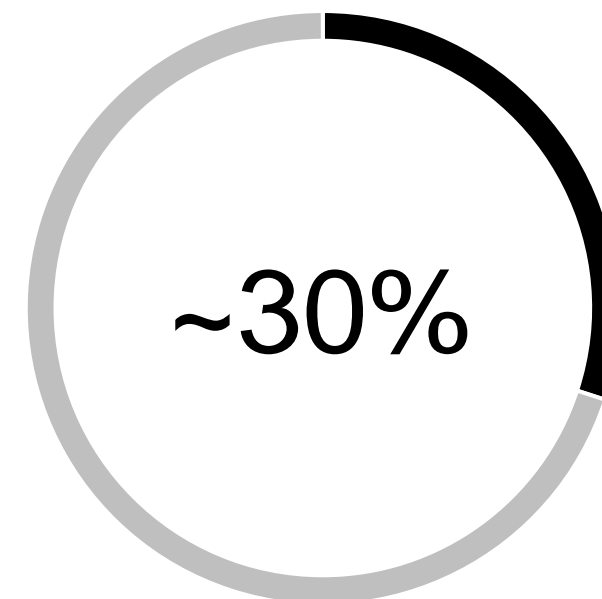
**Insurance**



**Banking**

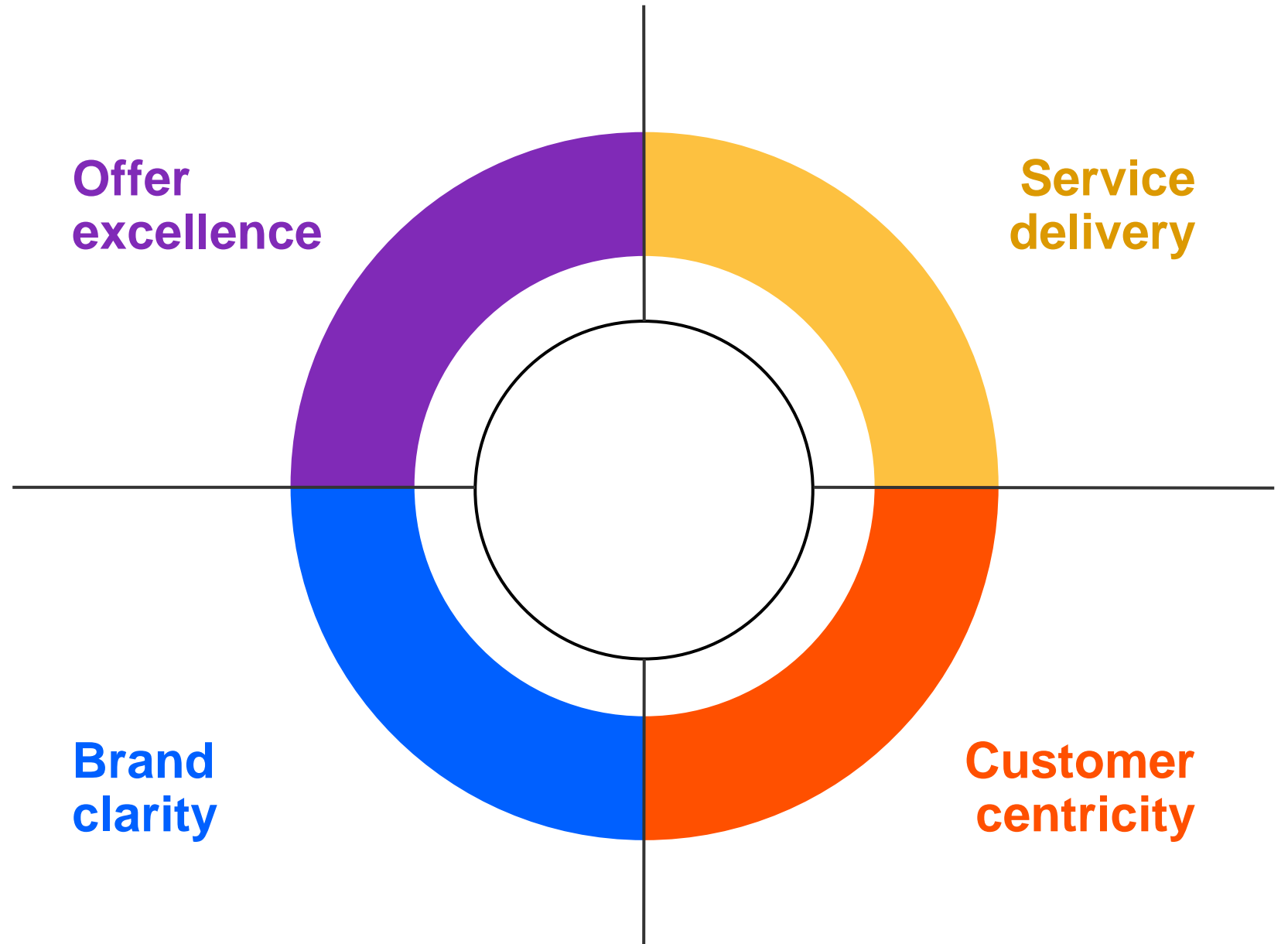


**Telecoms**





**Even in times of change, the core building blocks of succeeding with customers remain valid**





# 2

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## The 2021 Customer Leadership Index

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# The 2021 index retains the strength of the 2020 version with only a few slight tweaks

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Still based on 2020 CLi structure and methodology

Two new drivers added

And four new brands

Total **n=2000** surveys

And **n=6000** brand measurements

**56 brands** across **12 sectors**

Fieldwork in September





# The Customer Leadership Index comprises four core pillars

## Offer excellence

The core product/service is clearly fit for purpose and delivered at a fair price

## Service delivery

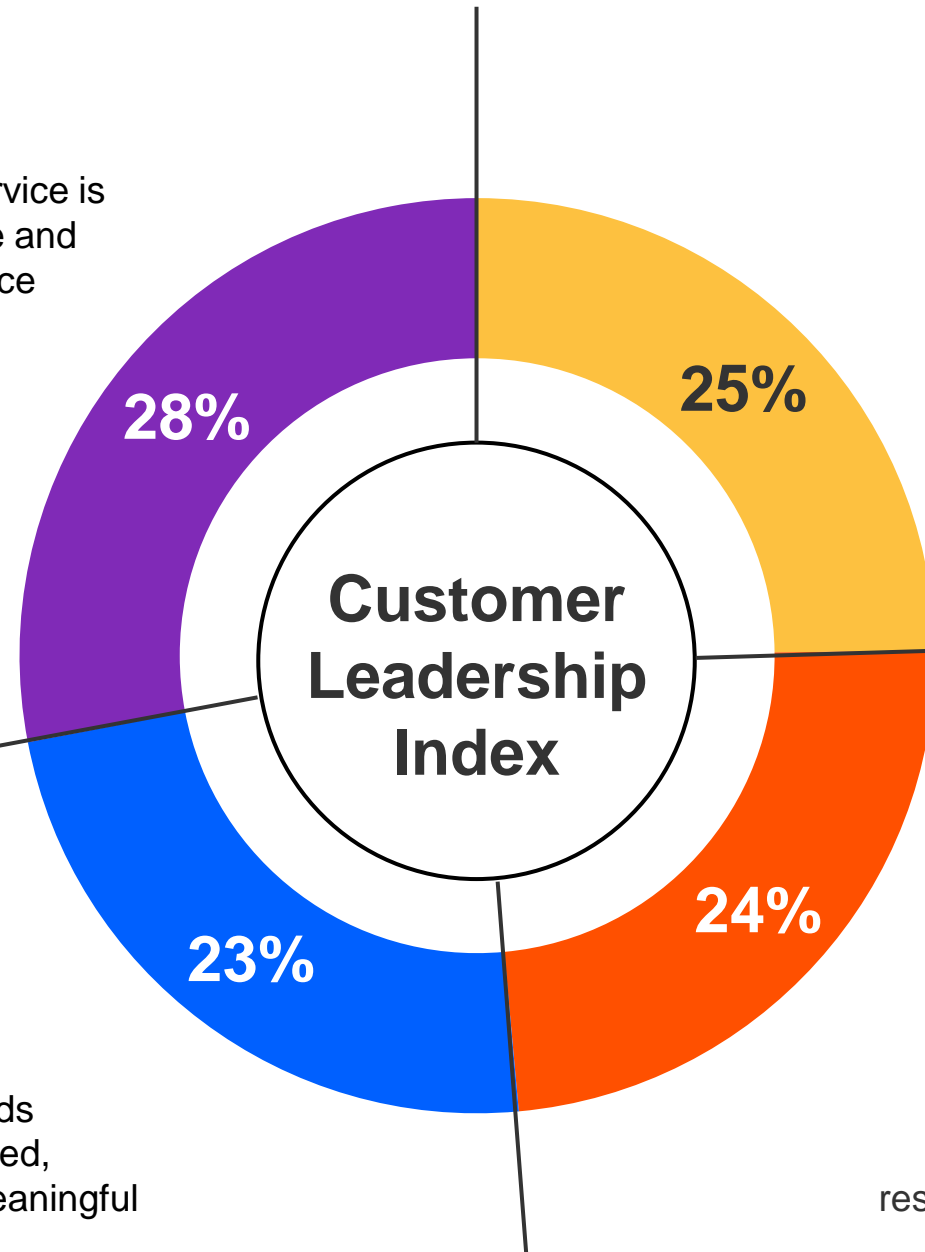
Dealing with the brand is easy, fast and a positive experience

## Brand clarity

What the brand stands for is clearly articulated, differentiated and meaningful

## Customer centricity

The brand is focused on customers and responsive to their needs



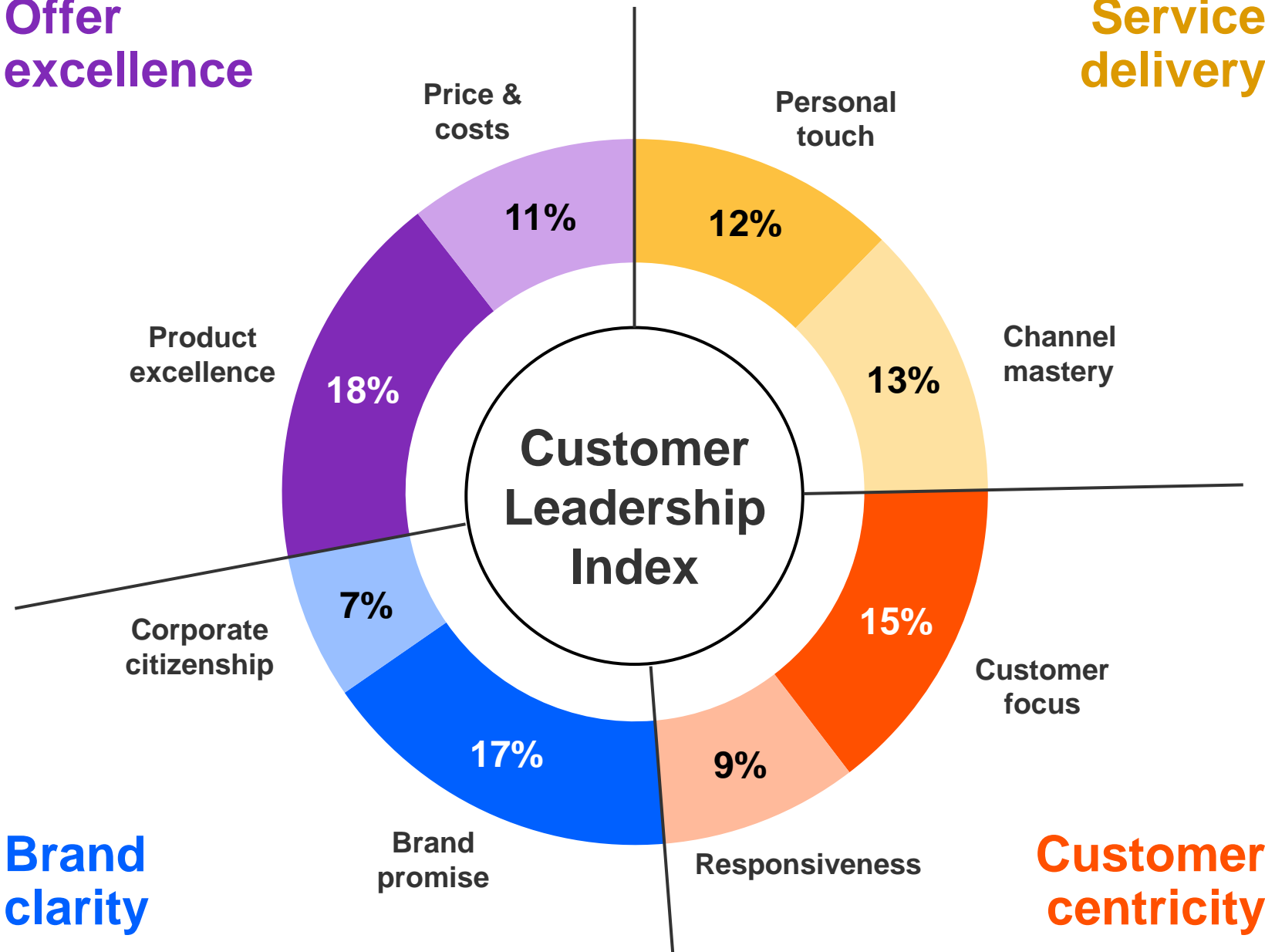
Each pillar is broken into two sub-pillars

**Offer excellence**

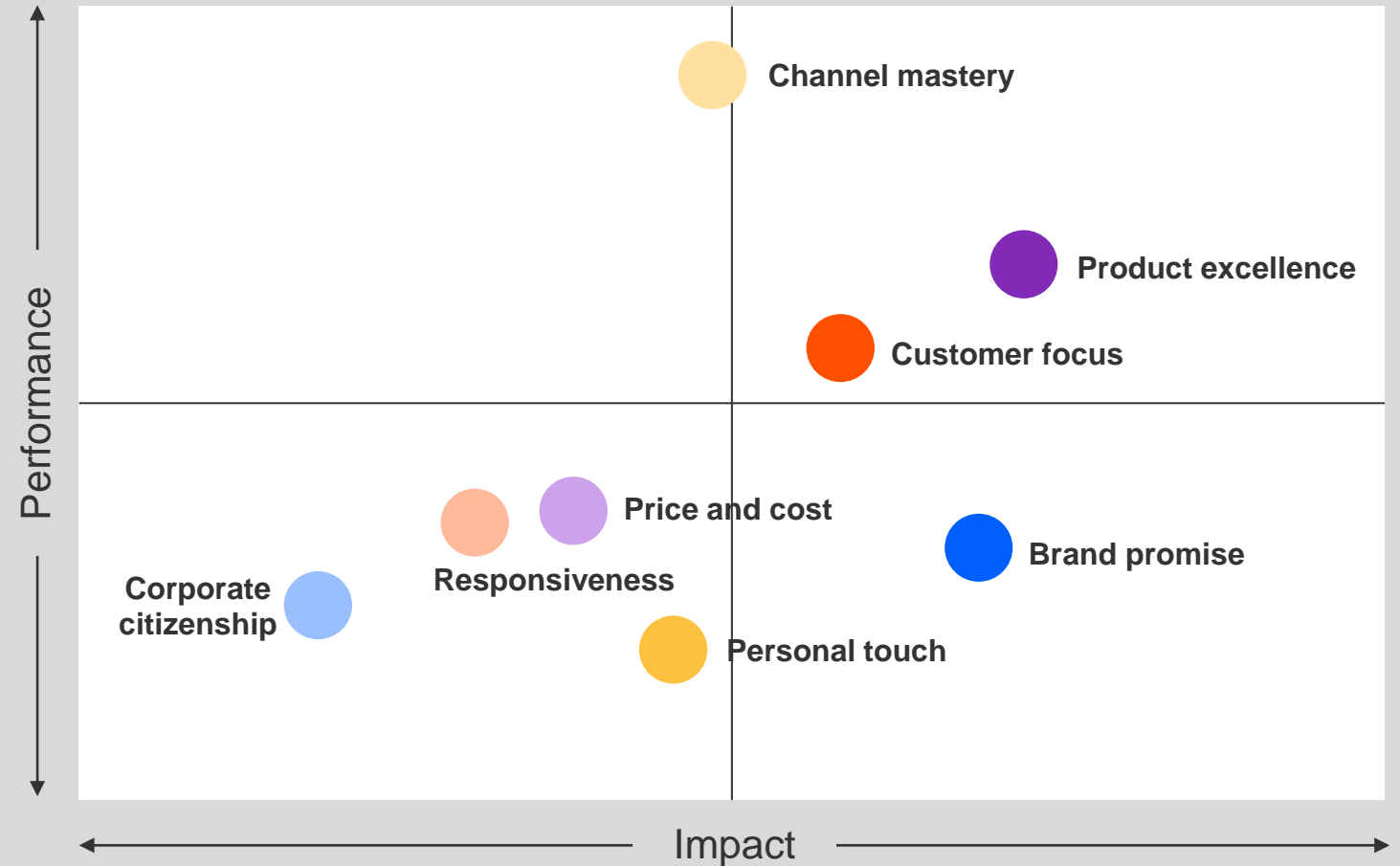
**Service delivery**

**Brand clarity**

**Customer centricity**



While brands do well at channel mastery, personal touch and a strong brand promise are important and weaker





# Higher index = better outcomes

## REPURCHASE

Low



56%

Mid



58%

Top 10



75%

## NET SPEND CHANGE



4%



10%



14%



# 3

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The top 10

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# THE TOP TEN

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■ = Index

1	Sharesies 	77	6	 AA Insurance	70
2	MITRE 10 	74	7	 noel leeming	68
3	BUNNINGS  warehouse	73	8	ASB 	68
4	AIR NEW ZEALAND 	71	9	bnz 	67
5	 Spotify®	70	10	 TOWER	66



# There are multiple paths to success

## Customer centricity



## Service delivery



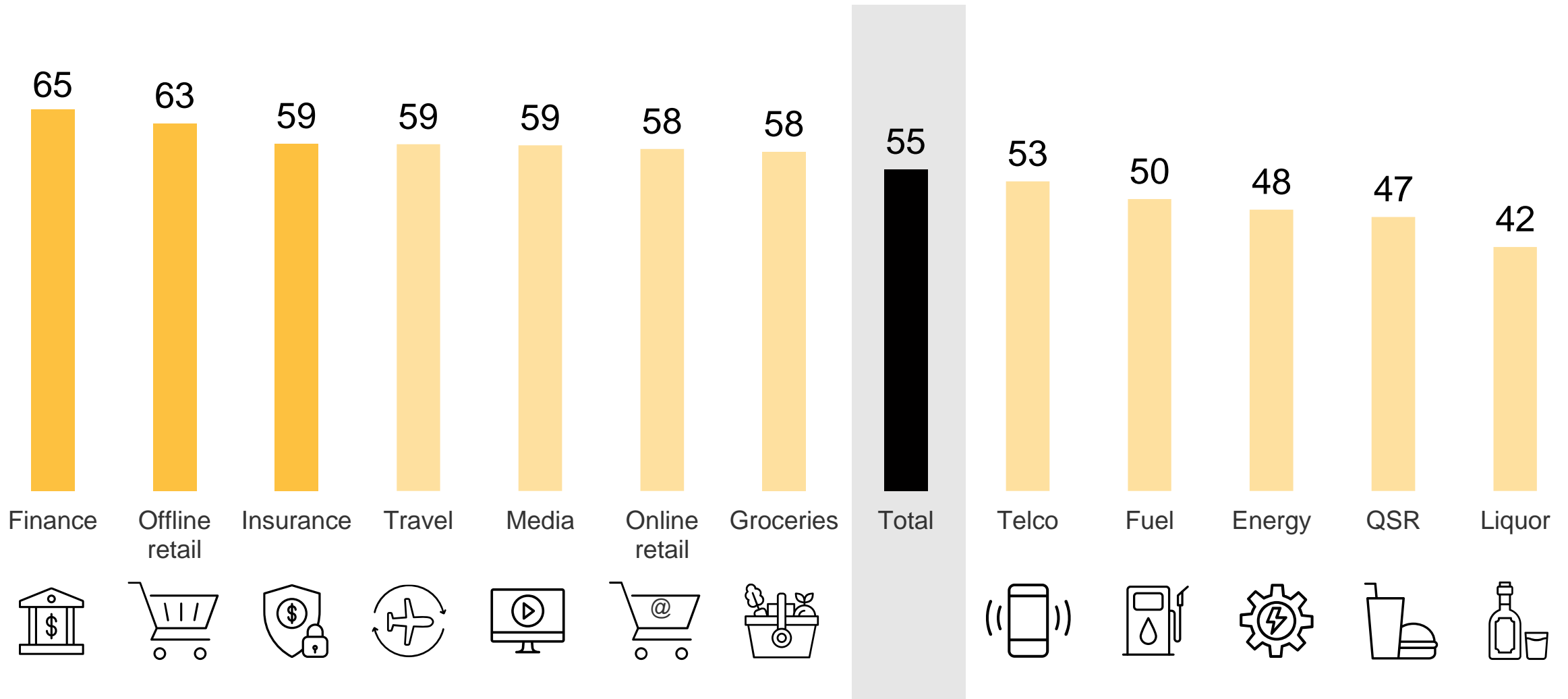
## Offer excellence



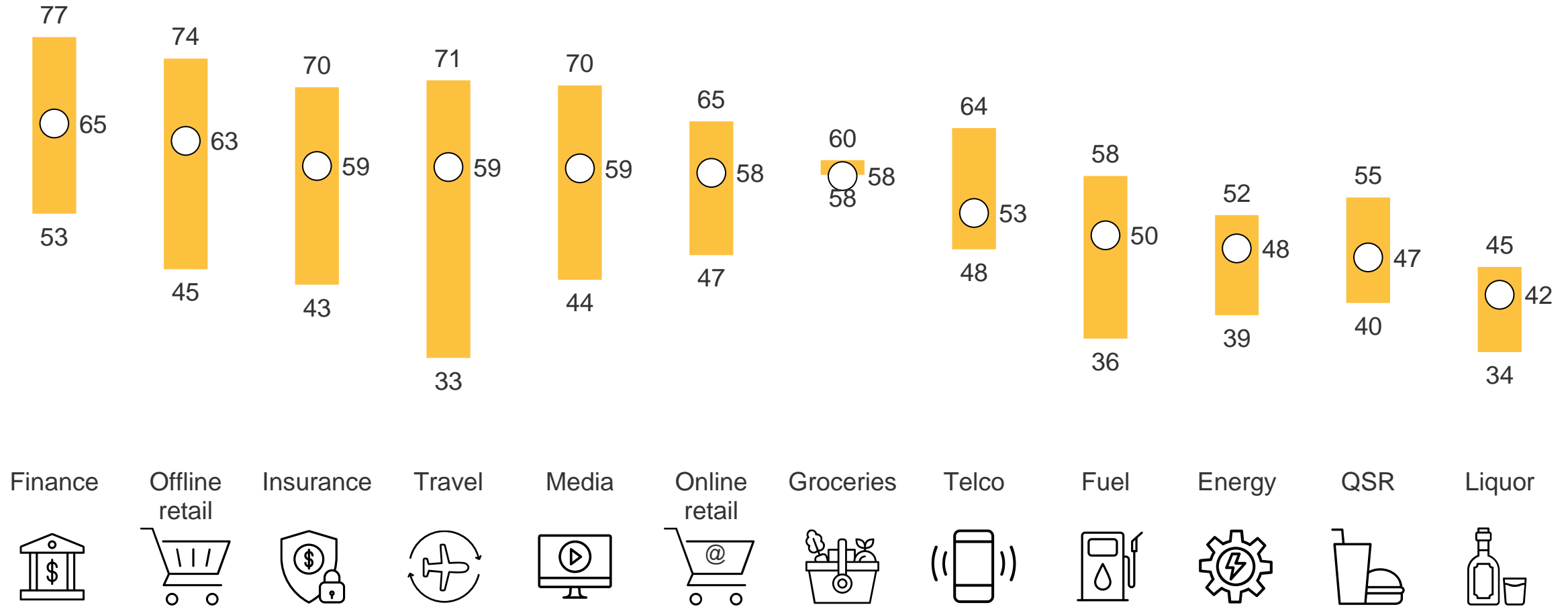
## Brand clarity



# Finance, offline retail and insurance brands do best overall

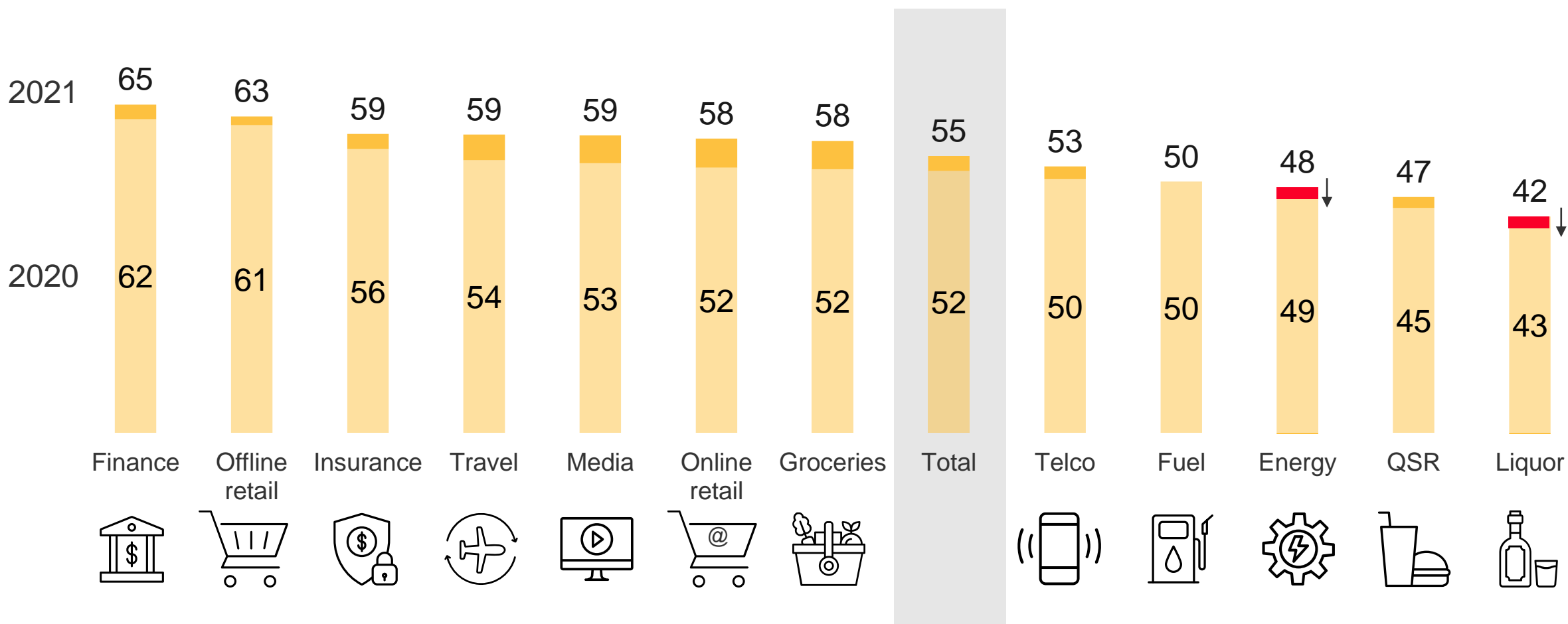


# The wide variation between high and low in many sectors highlights opportunities and risks for growth

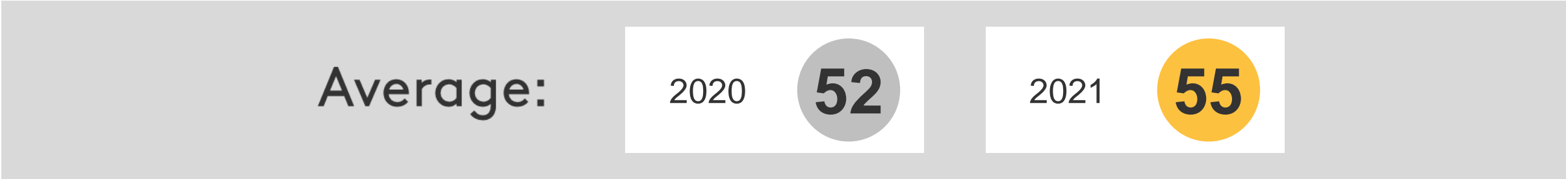
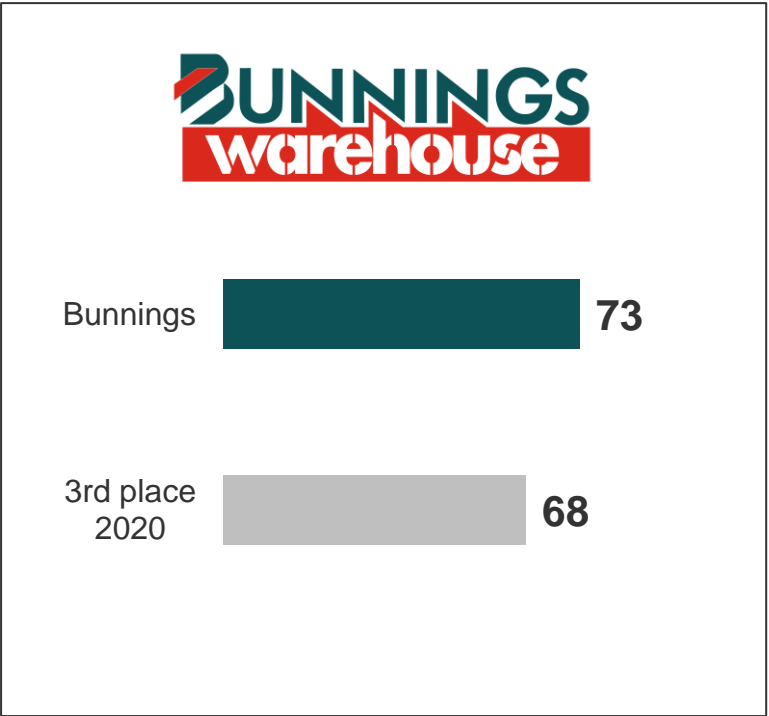
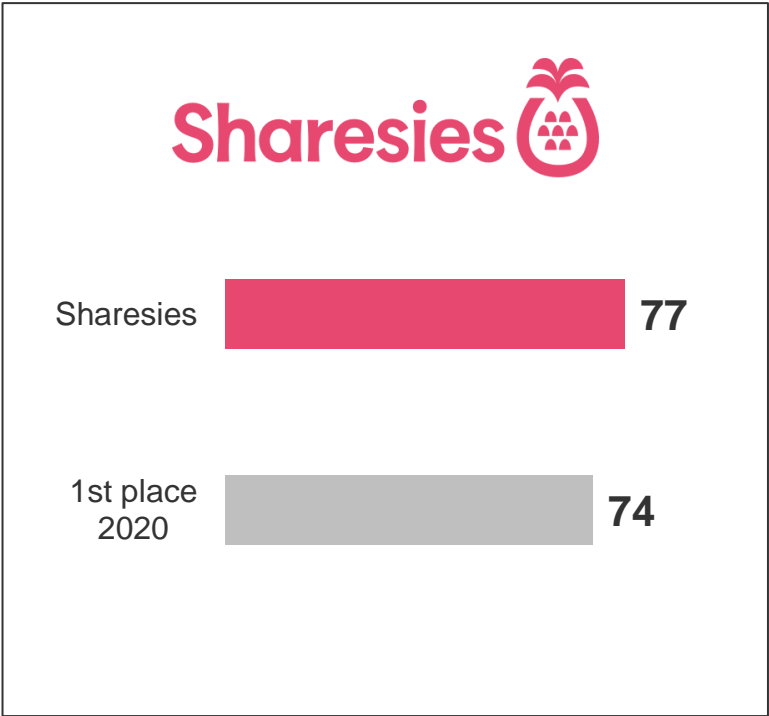




# Performance has improved this year, overall and across almost every sector



And our top three in 2021 are all higher than the top three in 2020





# 4

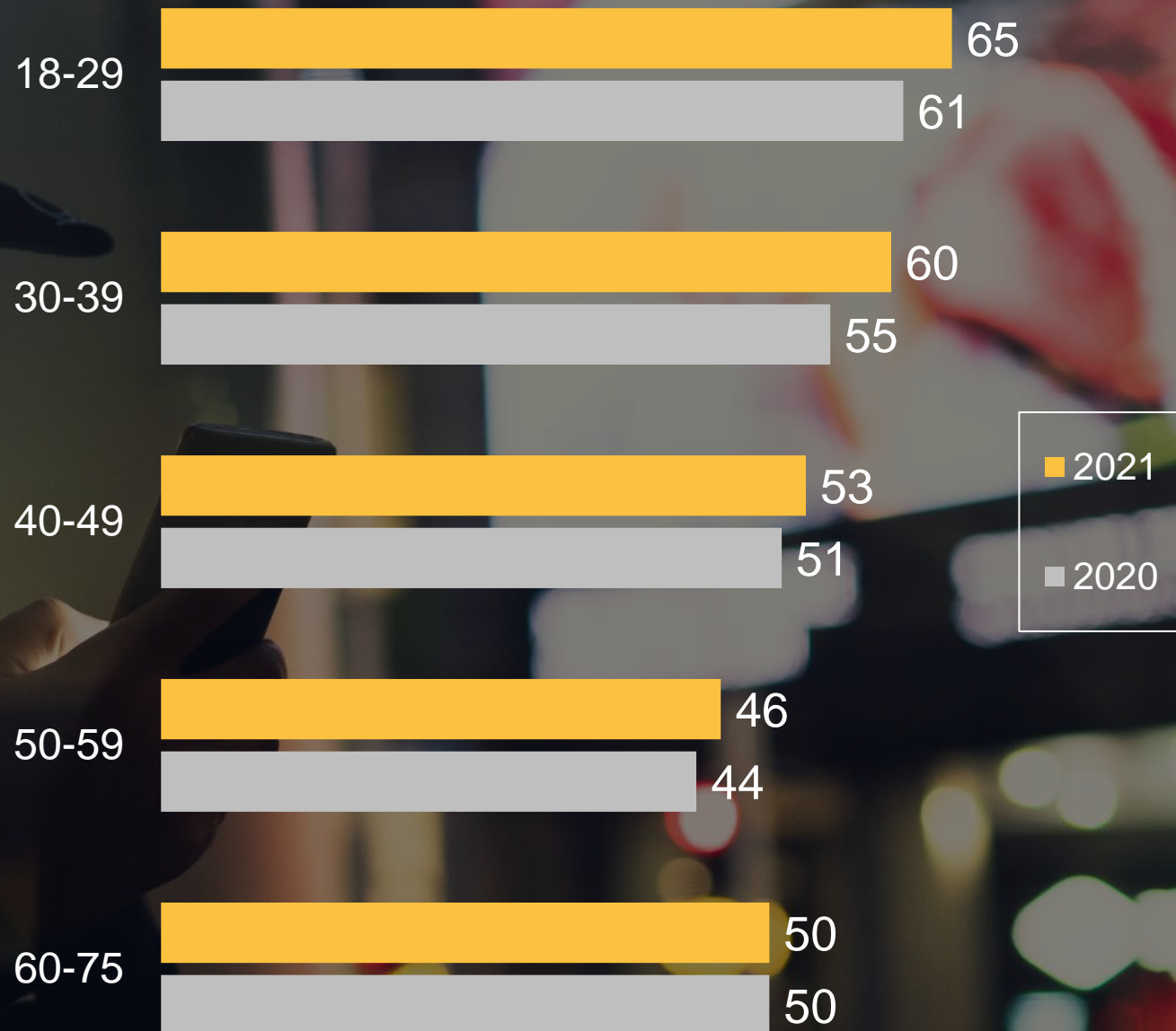
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## Learnings and insights



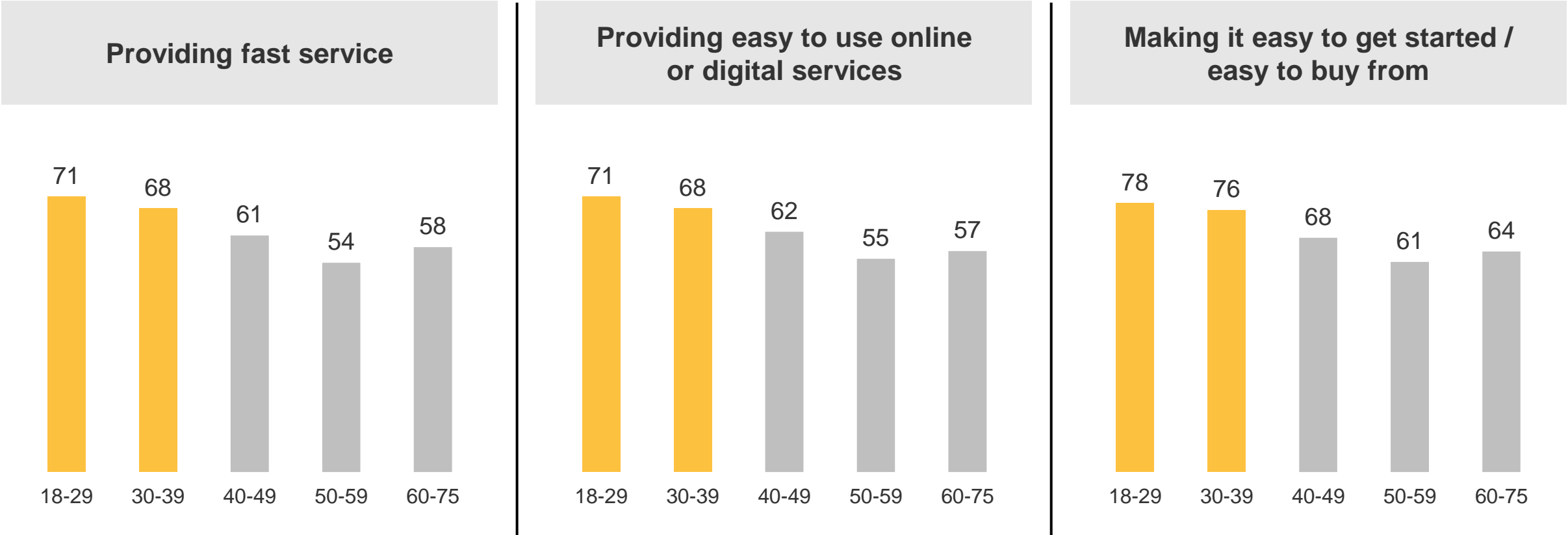
Younger  
New Zealanders  
are increasingly  
**more positive**  
about their  
brand  
interactions

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# There may still be an opportunity to better support older New Zealanders to make the most of digital services

## Channel mastery – average scores across all brands by age



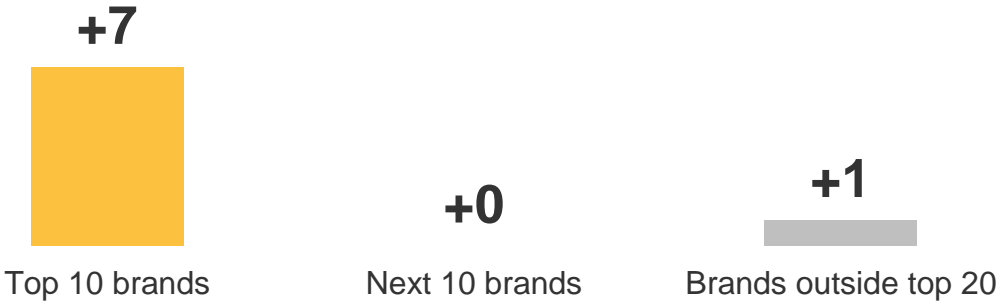
# The top 10 brands gain most ground on perceptions of price and channel mastery

Areas where top 10 brands recorded larger improvement (average improvement shown)

## Price and costs



## Channel mastery





# The rise of the specialist online platform – creating a modern and personalised point of difference

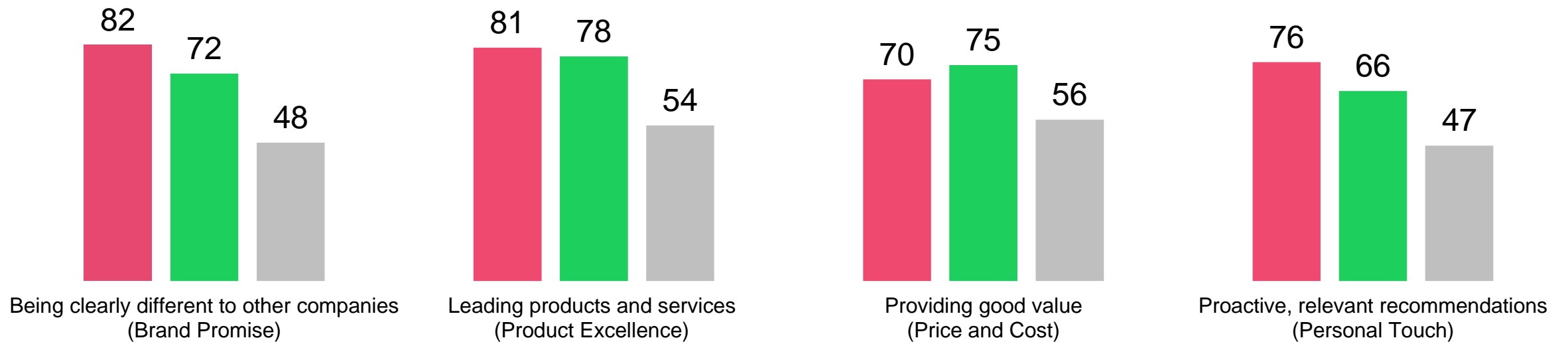


**1<sup>st</sup> position overall**  
Top 5 in 19 of 22 drivers  
(and 1st in eight)



**5<sup>th</sup> position overall**  
Top 5 in 13 of 22 drivers  
(and 1st in two)

■ Sharesies ■ Spotify ■ NZ Average





## Service which delivers strongly against their brand promise

### Sharesies – strongest areas of performance vs. New Zealand average

Brand promise  **+28 points**

Product excellence  **+25 points**

Personal touch  **+23 points**

Channel mastery  **+22 points**

“

**“Sharesies supports investors to be confident and motivated. Whether they’re new or experienced, frequently in touch or have challenging requests. It’s about sharing the LOVE.”**

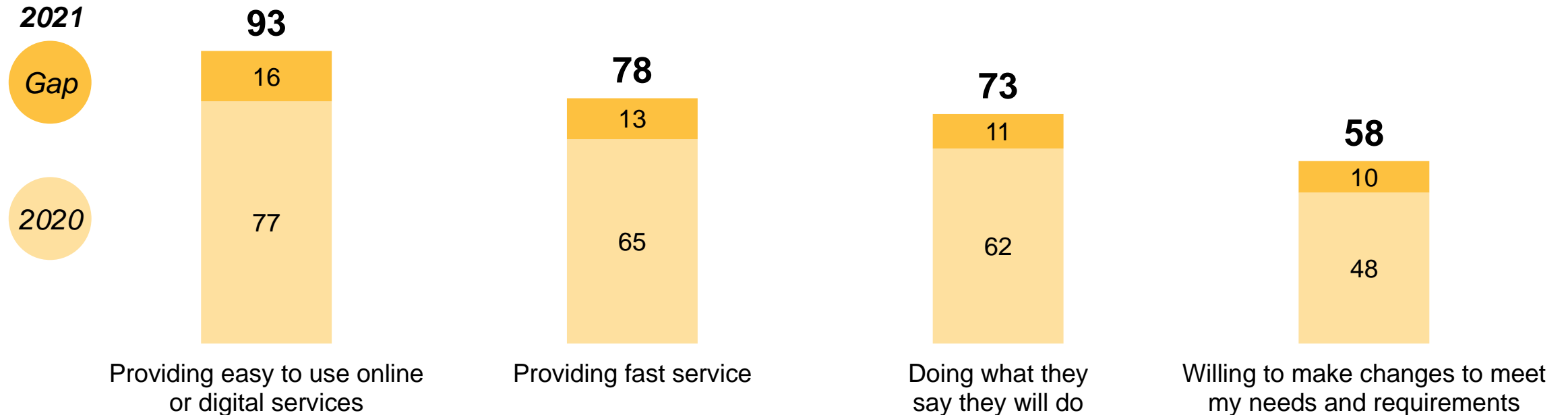
**Liz Krammer**

Investor Care Manager, Sharesies



12th in 2020, 9th in 2021, up 7 points overall.

## Focus on channel mastery and customer centricity





## BNZ's improving scores are a reflection of their ongoing commitment to customer service

### Channel Mastery

Providing easy to use online or digital services

**+16**  
(vs. 2020)

- Drive to digital for home-loan servicing
- Support for less digitally savvy

### Customer Focus

Doing what they say they will do

**+11**  
(vs. 2020)

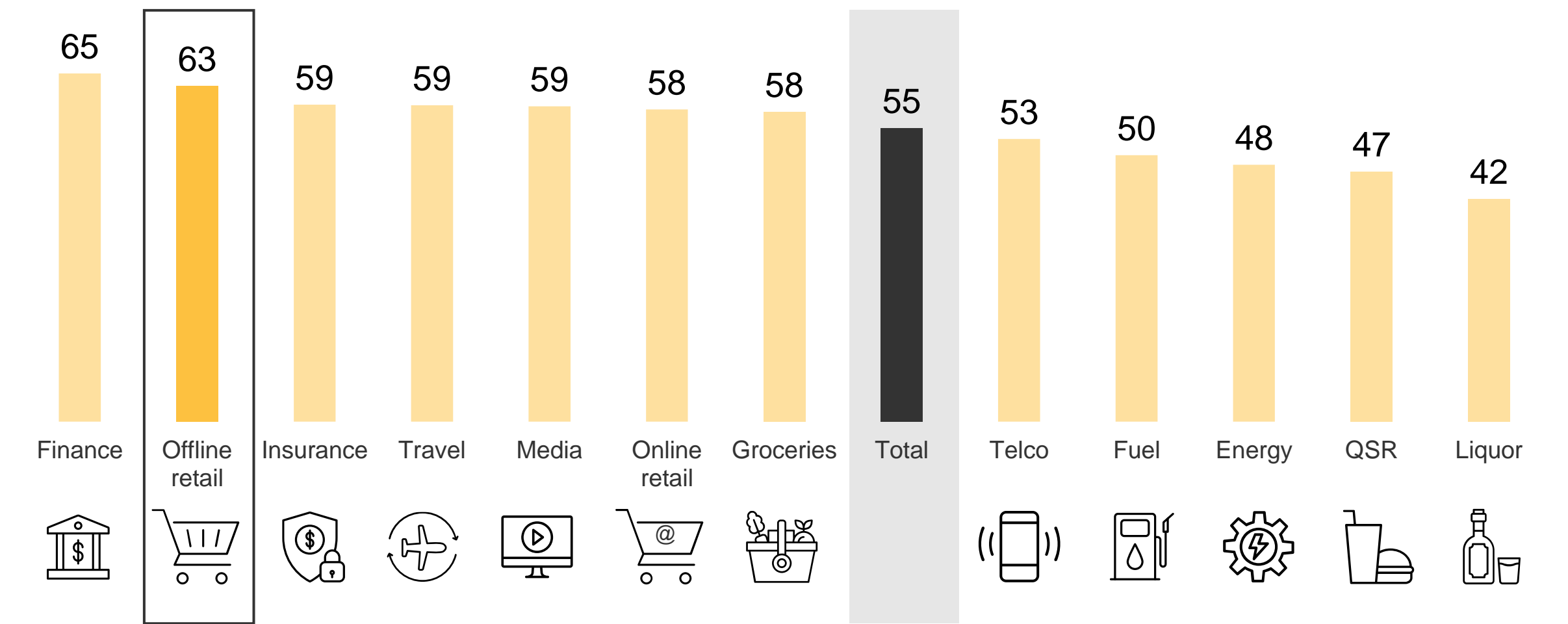
- Support for customers during pandemic
- Expanding skillset of staff members

**"At BNZ we support our customers by providing simple and easy digital tools backed by accessible and responsive expert bankers. While Covid restricted our branch opening hours, our service model and systems enabled our bankers to work remotely servicing our customers via phone and digital channels. While this result indicates we've made positive progress we're only part way through our roadmap of advancements that will continue to enhance the experience we deliver our customers."**

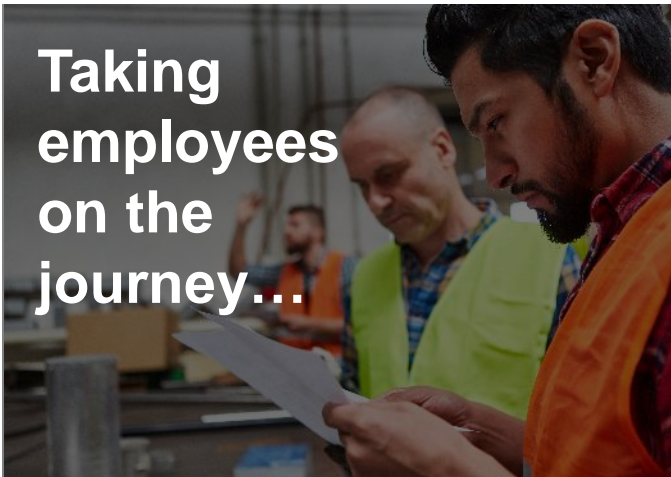
**Dan Huggins**  
Chief Executive Officer




# The big box retailers are notably more successful at driving customer leadership than other offline retail categories



# Focus on internal culture to help deliver against a new brand promise



Taking employees on the journey...



...before a strong consumer facing launch

## Drivers where Mitre 10 lead the way

Actively providing me with relevant advice and recommendations

**33 points**  
above NZ average

Treating me like a valued customer

**23 points**  
above NZ average

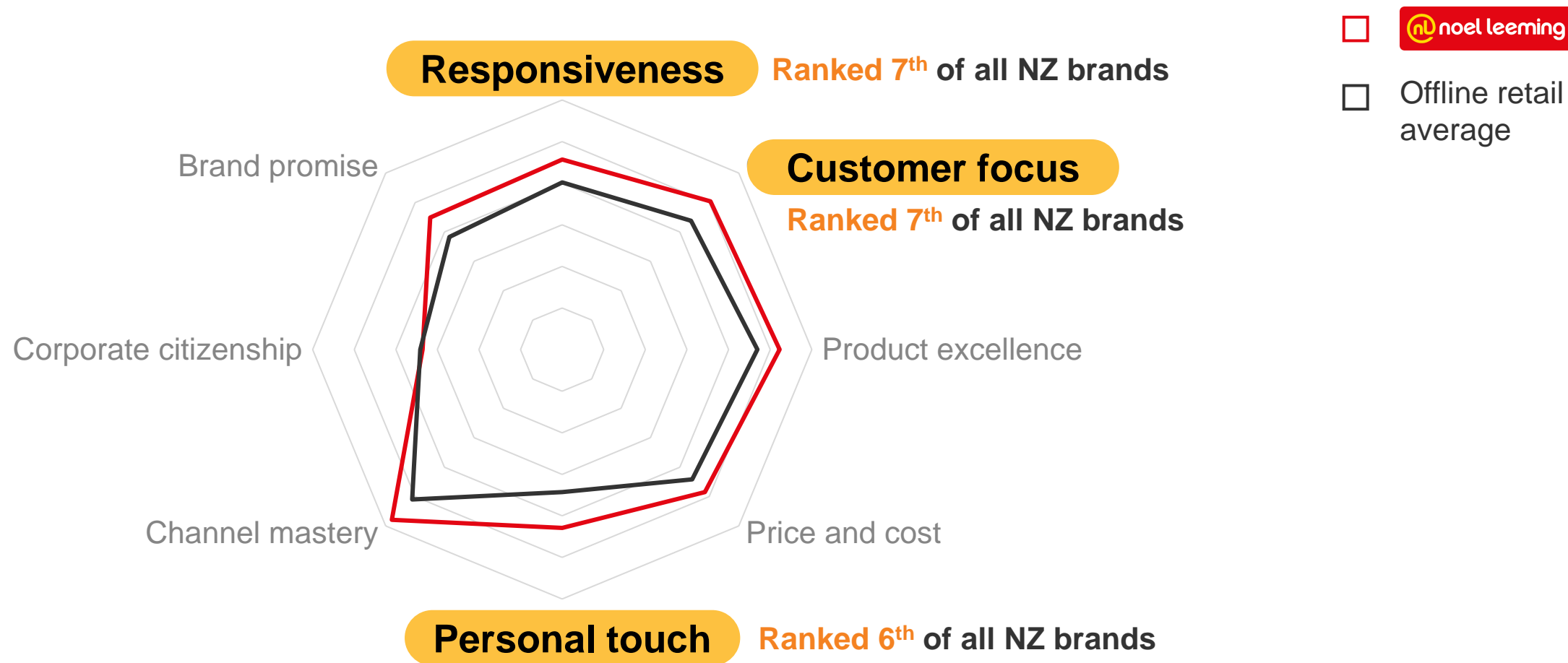
Being easy to buy from

**30 points**  
above NZ average

“We recently launched Mitre 10’s new brand promise ‘With you all the way’ – a commitment to our customers that they come first in all that we do. To deliver on this, we began with a fully internally focused enabler, Make It EPIC, which is a learning experience and cultural evolution focused on customer service and experience. This laid the foundation for us to then go to market with our brand promise, confident we could deliver and execute on our strategy – ultimately striving for Customer Experience excellence.”

**Jules Lloyd-Jones,**  
Chief Marketing Officer

# Noel Leeming is performing above the category average across several pillars, and excels on customer focus, responsiveness and personal touch





## Noel Leeming's response during a challenging year was particularly effective

Relevant useful and easy to  
understand communications

**+10**

**+5**

Leading the way with its  
products and services

**+14**

**+7**

Providing fast service

**+14**

**+9**

Being a company I would be  
proud to be associated with

**+13**

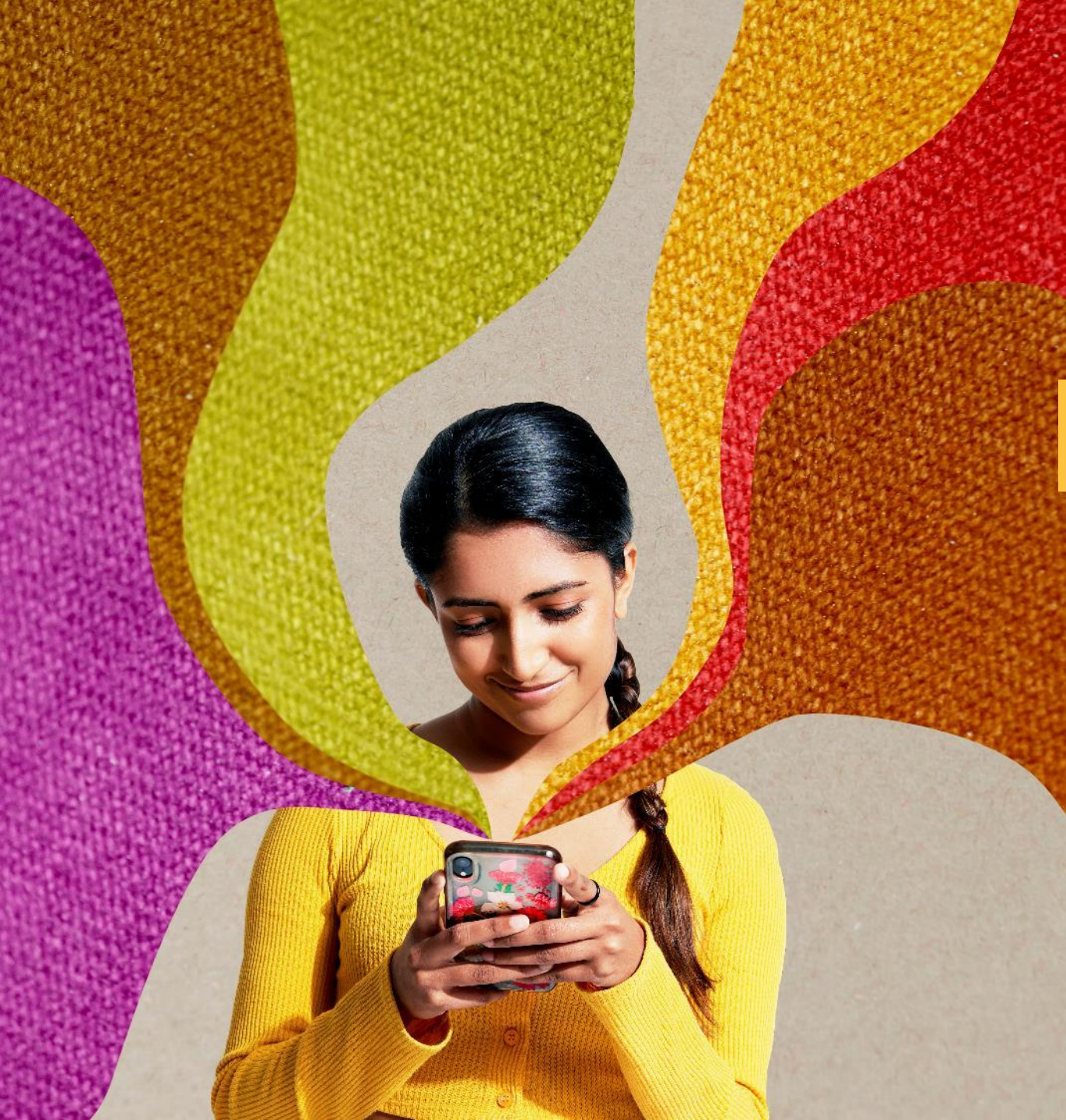
**+7**

“

**“We love to help people get the most out of their tech, and it's an honour for Noel Leeming to be recognised for providing some of New Zealand's best customer service and experiences. Noel Leeming has always stood for excellent customer service above all else and our Passionate Experts are living proof that service still sets us apart.”**

**Jonathan Waecker**

Chief Customer and Sales Officer



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Wrap





# Summing up

Being great at customer experience means getting many moving parts working in sync





# Summing up

Consumer preferences are changing – digital touchpoints are increasing in importance



# Summing up

Service which reflects and reinforces the brand promise is a key hallmark of success



**Need more  
insights?**

Customised sector-/  
brand-specific reports  
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Q&A

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# Thank you

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