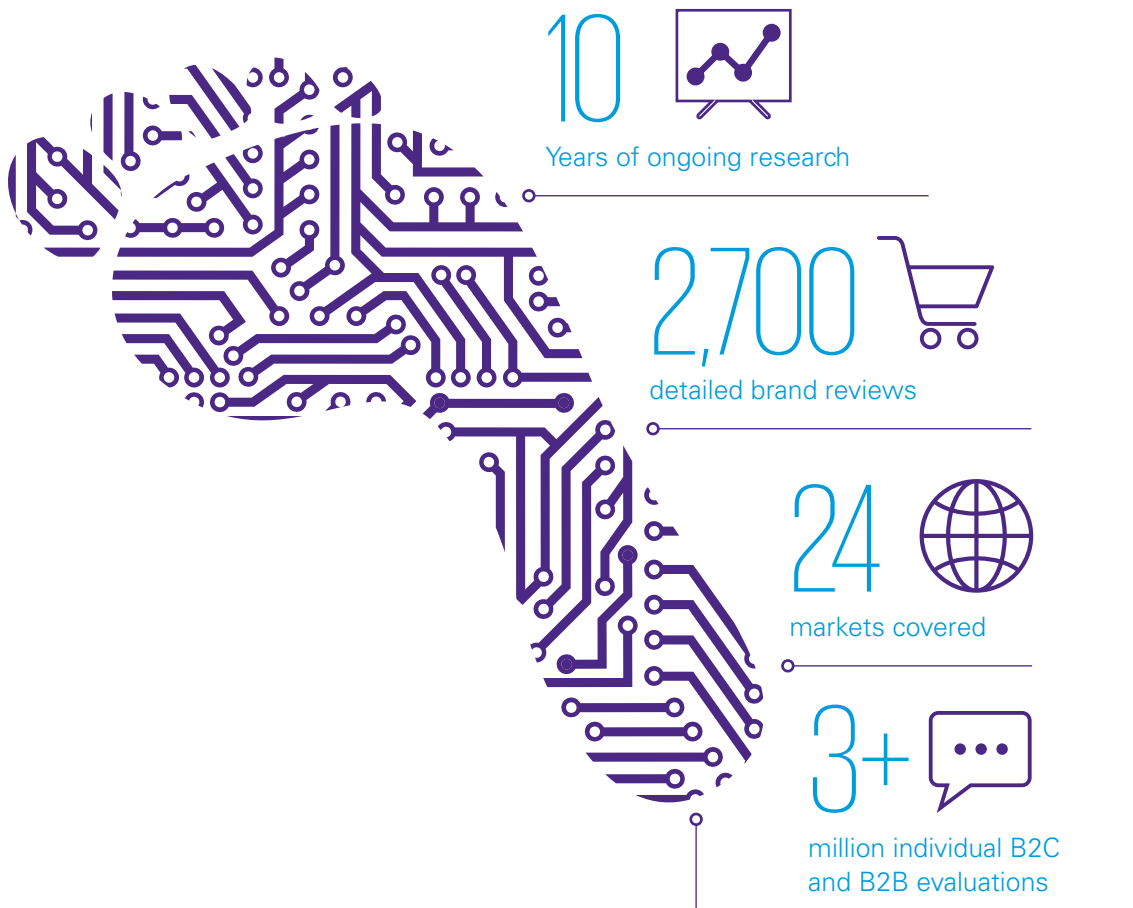




kpmg.com

At a glance:

Customer Experience Excellence Research



NL 2019 Customer Experience Excellence Research



5,052

respondents



214

brands



10

sectors covered

Introduction

Congratulations! If your brand is ranked in this report, you have good reason to be proud. According to Dutch consumers, the vast majority of brands in The Netherlands have improved their customer experience (CX) since last year. And that's an achievement worth celebrating.

However, our research suggests those who stand still are quickly falling behind. That's because customer needs and expectations are continuously changing. And while that's nothing new, the pace at which these changes are occurring is adding unprecedented urgency. Indeed, in today's fast-paced digital and customer-centric world, it is disrupt or be disrupted.

Yet, our research shows that only a few have managed to make the changes necessary to turn their brands into truly customer-centric and digitally-enabled enterprises.¹

This year's champions, on the other hand, are meticulous about putting their customers at the heart of their organisation.

They listen to their customers, take the time to understand their needs and priorities, and then move quickly to meet or even exceed their expectations.

What separates the CX leaders is a deep organisational desire to ensure that everyone and everything is aligned towards one common goal: to deliver outstanding customer experiences. They are there for their customers, particularly at their 'moments of truth'. And they put great effort into showing their customers they are valued.

In this report, we go beyond the rankings to explore some of the deeper trends changing the customer experience across today and tomorrow.

We discuss the importance of brand purpose and the need to continuously translate your brand values into the customer experience. We look at how some of the leaders are using digital solutions to create the ultimate 'phygital' experience – the integration of digital into the physical experience. And we explore how consumers' digital footprints are being leveraged to create new, innovative and better customer experiences.

Ultimately, our report suggests that Dutch customers are rewarding those brands that offer them experiences they won't quickly forget: a 'digital walk to remember'.



Nienke Wichers Hoeth

¹KPMG (2017,2018,2019). Global CEO Outlook

Key findings

#1

Overall Best Customer Experience: Van der Valk Hotels (8.01)

Climbing four places to take top spot in this year's Customer Experience Excellence (CEE) research, Van der Valk received the highest scores on five of The Six Pillars, scoring second only under the Empathy pillar behind Lush.

7.23

Overall Customer Experience rating: 7.23

The average CEE score increased from 7.14 last year to 7.23 this year, with more than three-quarters of brands outperforming their previous year's scores.



Leading sector: Retail

Grocery Retailers scored an average CEE of 7.36, followed by Non-Grocery Retail at 7.32, with new tech-savvy entrants who are actively competing for the heart of the customer.



Rising pillar: Expectations

While Personalisation remains the greatest driver of an excellent customer experience, this year has seen a considerable increase in the importance Dutch consumers place on the Expectations pillar.



Lagging pillar: Empathy

Dutch consumers gave brands an average rating of just 6.94 under the Empathy pillar, suggesting most brands still have much work to do here.

7.87

Most empathetic brand: Lush (7.87)

With a CEE score of 7.87 on Empathy, Lush shows that investing time into understanding and responding to customers' unique needs can help establish a strong emotional relationship with customers.



Most improved sector: Hotels and Travel

The Hotel and Travel sector increased their performance by around 3 percent over last year and boasts the highest new entrant (Landal entered the rankings at number 11) and the biggest climber (Corendon jumped 82 places over last year).



Personalisation

Using individualised attention to drive an emotional connection



Integrity

Being trustworthy and engendering trust



Expectations

Managing, meeting and exceeding customer expectations



Resolution

Turning a poor experience into a great one



Time and Effort

Minimising customer effort and creating frictionless processes



Empathy

Achieving an understanding of the customer's circumstances to drive deep rapport

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2019 NL Top 100 Customer
Experience Excellence champion

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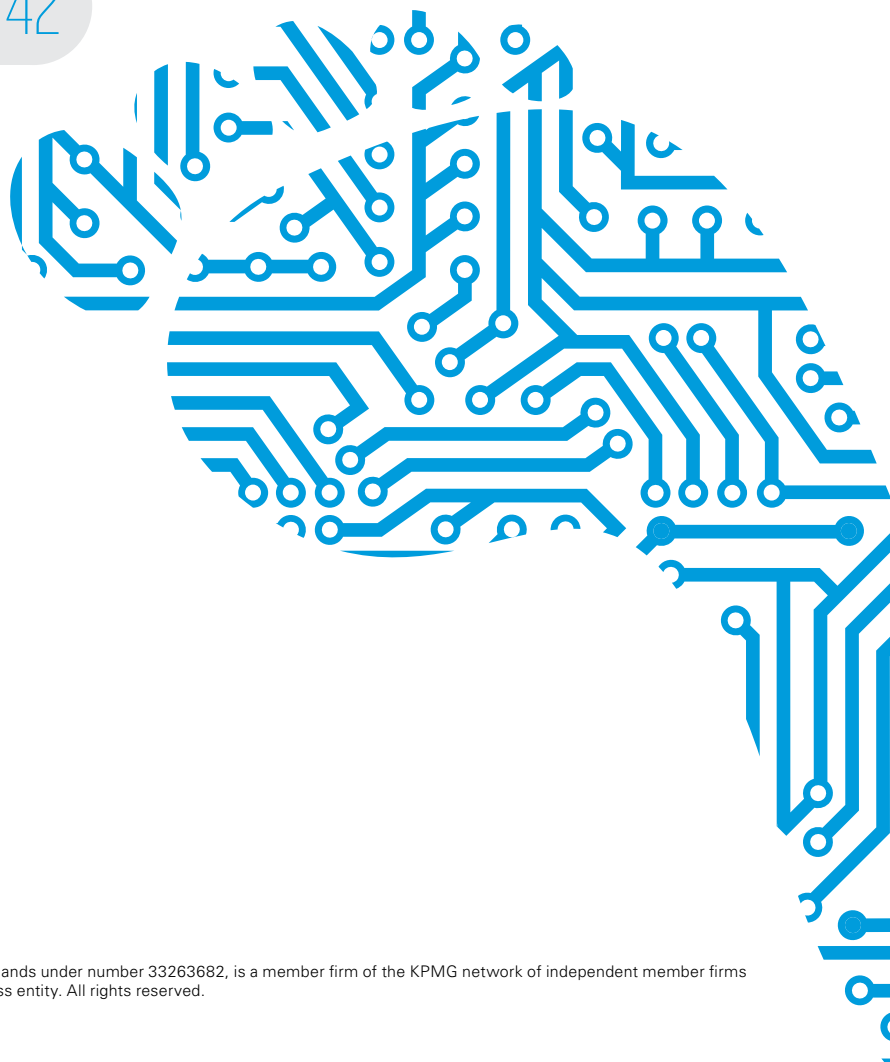
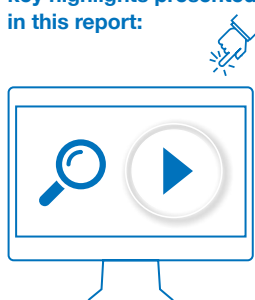
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Click here to get a quick
tour through some of the
key highlights presented
in this report:



State of the nation

The battle for the customer wallet has reached new heights as customer expectations shift and new entrants change the rules of the game. It's no longer good enough to simply offer a functional service; today's customers expect every interaction to be an experience.



7.23

More than three-quarters of the brands in this report improved their Customer Experience Excellence (CEE) score over last year

Delivering on higher expectations

Our research of consumers suggests that Dutch brands recognise the importance of the customer experience and are taking steps to improve it. More than three-quarters of the brands in this report improved their Customer Experience Excellence (CEE) score over last year. And that helped bring the average CEE score up to 7.23 (from 7.14 last year).

At the same time, brands in The Netherlands also recognise they are now no longer just competing against peers in their sector, they are competing against every other brand a consumer comes into contact with. Once consumers engage in an exceptional experience they won't settle for less, regardless of brand or sector.

The competitive environment is heating up as a result. In fact, in our research, the number of brands consumers ranked as 'excelling' (that is, achieving a score of 7.5 or above) increased to a total of 34. The intensified level of competition is not only seen in the top of the list, the vast majority (77%) of brands scored between a 6.5 and 7.5, hence minor changes can make a significant impact. At the same time, 21 new brands entered the Dutch CEE Top 100 this year.

The dynamism in our rankings only underlines the need for brands to become even more adaptable in order to respond to customer expectations.

Making it personal

Perhaps not surprisingly, Dutch consumers continue to rank Personalisation as the greatest driver of an excellent customer experience. Yet, interestingly, it is the only CEE pillar to have seen a drop in scores versus last year, suggesting that customers highly value Personalisation but may not feel they are seeing enough of it to make them happy.

A recent survey of global CEOs¹ conducted by KPMG International this year seems to indicate that CEOs understand the challenge. Most said they see customer data as one of their most valuable assets and key to enhancing their ability to personalise products and services. But less than a quarter of the CEOs in that survey claimed to be able to exceed customer expectations for Personalisation.

¹KPMG (2018). CEO outlook 2018

Expecting more

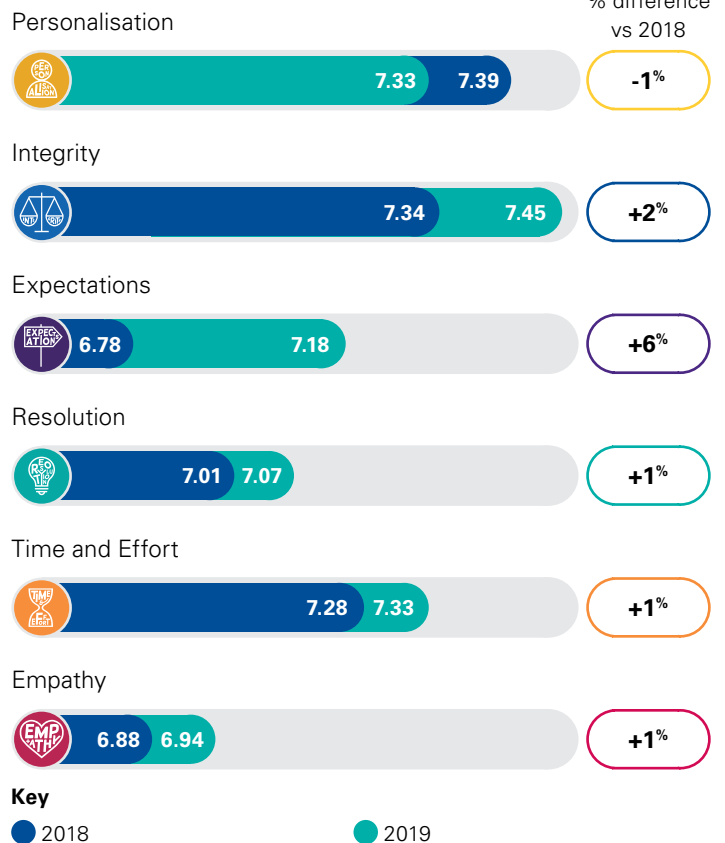
Expectations, however, are on the rise. And that is clearly demonstrated in the notable increase in the importance placed on the Expectations pillar as a key driver for customer experience excellence in The Netherlands (up by 2.6 percentage points over last year).

In many cases, brands are feeling the impact of a phenomenon known as 'expectations transfer': expectations set by companies like Uber quickly become the standard expectation across all industries. Those brands able to successfully manage, meet and exceed expectations are being highly rewarded.

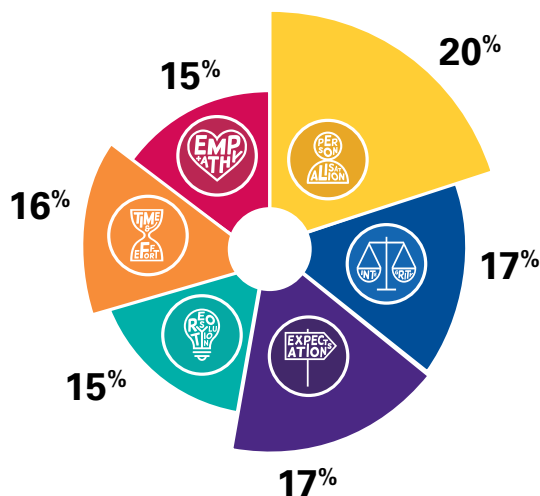
It is also worth noting that expectations are no longer solely set by brands but rather increasingly by co-consumers (often through channels such as social media or online reviews). Millennials, in particular, are influencing expectations across generations and consumers of all types are becoming more informed and digitally-savvy. The customer has always been king; the difference is that they now know it.

That is not to say that Dutch brands are not rising up to meet expectations. In fact, we have seen performance under this pillar rise by 6 percentage points this year over last – the most significant increase of any of The Six Pillars in The Netherlands. Considering the rapid evolution of customer expectations, that is a notable achievement.

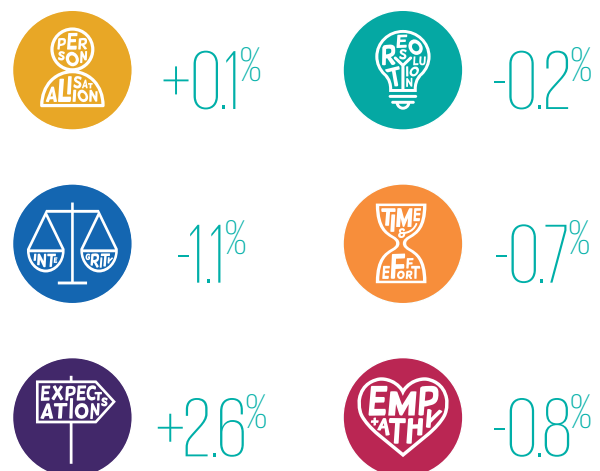
Performance of The Six Pillars

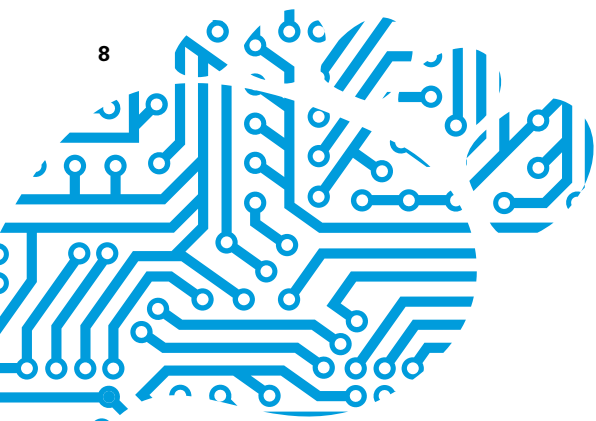


Pillar impact on Customer Experience Excellence



Shift in pillar performance compared to previous year





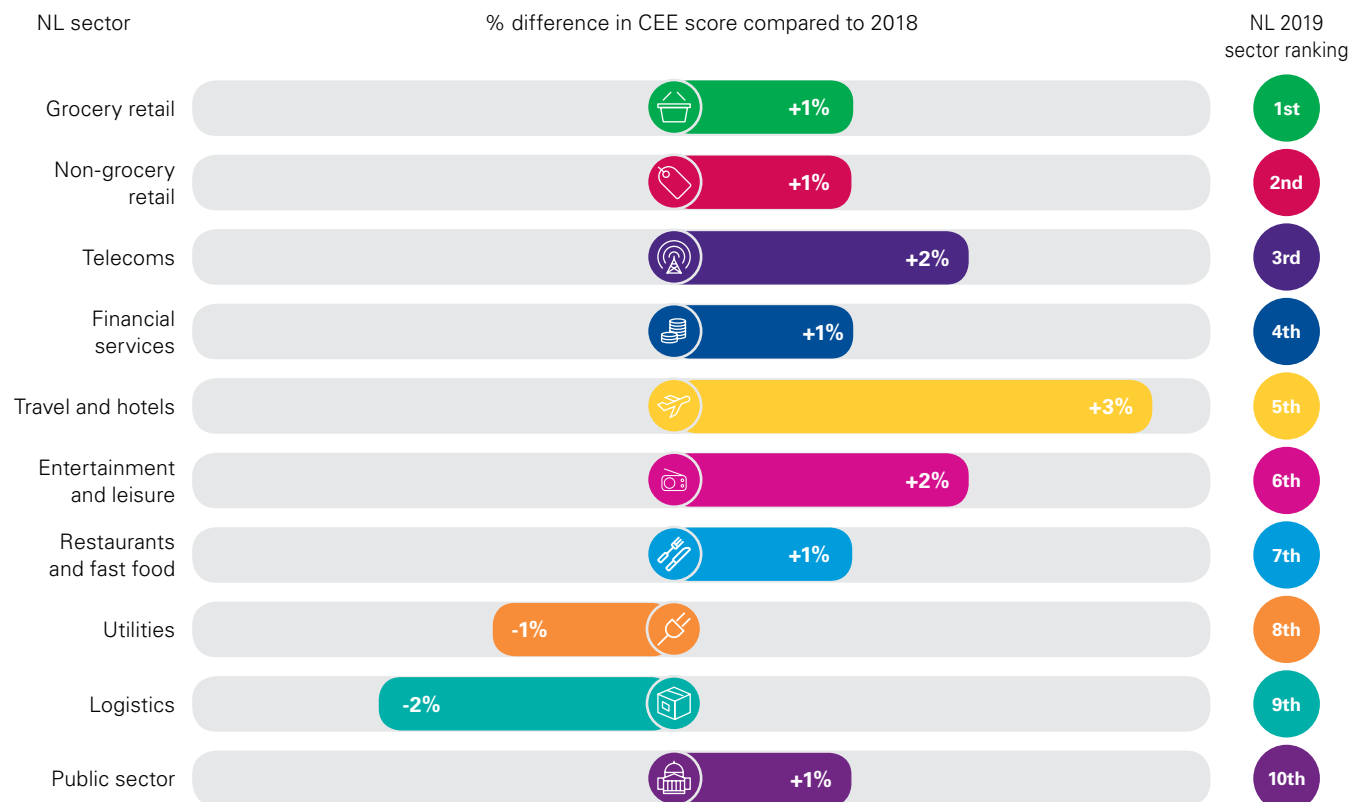
Retail on top... for now

Retailers in the Netherlands seem to have a very clear understanding of the importance of an excellent customer experience. Once again, retailers lead our CEE industry rankings: Grocery Retail ranked as the leading sector with Non-Grocery Retail ranked second.

Changes in digital preferences and capabilities are clearly having an impact on the way customers view the retail experience. And retailers are increasingly leveraging digital to create an optimal 'phygital' customer experience, integrating digital into the physical setting. Competition for the customer is heating up, paving the way for digitally-enabled brands like Picnic (ranked 26th in our report) to challenge the status quo in Retail.

Whereas retailers top our list again this year, the question is for how long? Our research suggests that Telcos, Financial Services and Travel and Hotel brands are quickly closing the gap, with Travel and Hotels seeing the greatest increase in scores. The Travel and Hotels sector was also the only sector to enjoy an increase in performance across all of The Six Pillars.

NL sector performance



Looking ahead

While it is clear that brands operating in The Netherlands have stepped up their game, this is no time to rest. The expectations of today's digitally-enabled consumers are constantly and rapidly resetting. Brands will need to find ways to continuously improve and invest into the customer experience if they want to continue to meet expectations in the future.

Our view suggests that the leaders of tomorrow will be those who are able to improve their performance across all six of The pillars of Customer Experience Excellence. We look forward to finding out who will be in the top spots next year.

The 2019 NL customer Champions

Curious what makes van der Valk stand out? Click here to experience van der Valk's customer journey



1st



"Every night in a Van der Valk hotel is a pleasant surprise. From a glass of free apple juice for my nephew at breakfast to a refund because I had to go for surgery the next day. The staff is always very friendly."

Van der Valk Hotels

This year's Customer Experience Excellence leader is family-owned hotel chain Van der Valk. Up from fifth place in last year's rankings, Van der Valk continues to innovate with the customer at heart. The brand has been a keen adopter of customer-facing technologies – offering digital receipts ('Digibon'), mobile payments and apps that allow customers to order food and drinks online – while above all maintaining the human touch. Customers frequently point to the chain's genuine hospitality and the efforts of employees to meet and exceed customer expectations.

2nd



"After receiving a damaged book I was helped very well by bol.com's customer service: I received a new book even before I returned the damaged copy!"

bol.com

Rising one place to second in our rankings, bol.com continues to delight its customers. By far the largest online marketplace in The Netherlands with more than 9 million customers, bol.com sees itself as the "store for everyone". Through valuable loyalty services like 'Select' and their ability to anticipate future customer needs through pioneering new technology advances like voice, bol.com is proving that it understands its customers and their changing preferences. The brand combines this customer focus with a wide assortment of products, an extreme focus on convenience and exceptional customer service to continuously impress and engage their customers.

3rd

"I like the personal attention and I really like the products. The employees are of great help in store: they offered great alternatives on a product that was out of stock."

Lush

Again in our Top 3 this year is Lush. Known for its sustainable and animal-friendly products, customers repeatedly cite the company's ethical values and sustainability standards as key drivers of the customer experience. The brand also puts great effort into creating alignment between the employee experience and the customer experience. As a result, customers frequently note the personal attention they receive from employees, their product knowledge, advice and encouragement.

4th

"I always remember the scent for a very long time after visiting a Rituals store. It is as if you immediately relax when you enter. You also get a warm welcome with a cup of tea. Great shopping experience."

Rituals

New to our Top 10 this year is Rituals, a luxury home and body cosmetic brand inspired by centuries-old Asian knowledge and traditions. As Rituals says; "We're not here to sell you beauty, we are here to make you feel good". And that means helping customers change their everyday routines into meaningful experiences. Their stores offer a calming environment where customers can relax with a cup of tea, enjoying personal attention, mini treatments and great smelling products. Customers frequently say it is an experience to enjoy and remember.

5th

"I'm a fan ever since my first purchase at Coolblue: fast delivery and good and reliable employees."

Coolblue

Coolblue is a textbook example of a brand that is designed around the needs of the customer. They know what their customers want and go beyond expectations by continuously improving their experience – new services such as same-day delivery and timeslot delivery options, the rapid introduction of Apple Pay (Coolblue was the first retailer to offer the payment option in The Netherlands), and a healthy dose of personal touch wherever possible are just some of the attributes that have pushed Coolblue into the Top 5. Their slogan of "everything for a smile" is even embedded in the little things, like the shopping cart icon on their website which changes as more products are added.

6th

"I purchased my first pair of glasses here. They have very friendly staff and even after a period in the hospital they asked me how I was doing. They really know their customers."

Pearle Opticiens

First time entrant in The Netherlands Top 10, Pearle Opticiens' continuous focus on improving and optimising the customer experience has paid off. The brand's 'pilot stores' allow the organisation to test new concepts and innovations with their customers. The pilot stores carry a more modern and industrial look, an experiential element where customers can watch their glasses being made for them, as well as digital channels and effects such as screens where customers can compare how different glasses look on them.

7th

"I have been here twice. The first time I was here for a hearing test and the second time for the fitting of the hearing aids. Both times I was very pleasantly helped. The employee had a clear story and he took all the time for questions and answers."

Specsavers

Specsavers, a family-controlled franchise business with more than 1,800 stores worldwide also enters our Top 10 for the first time. The organisation, which also sells hearing aids, offers a customer experience that is defined by a personal touch, both in store and online. They also prioritise innovation: their 'virtual try-on' button on their website allows customers to see how different frames may look on them and their 'connected hearing aids' automatically connect to specific devices to provide customers with clearer sound.

8th

"Even after half a year the saleswoman immediately knew who I was when I walked in again, and she remembered what glasses I had taken on her advice. You don't experience this anywhere else."

Eye Wish Opticiens

Another optician that is new to the Top 10 list, Eye Wish Opticiens aims to 'look through the eyes of the customer'. The brand goes out of its way to give customers the experience and service they wish for, providing personal style advice to their customers through their network of instore style advisors and their offer of free maintenance on their glasses.

9th

"I have been an ANWB member for over 40 years and I am extremely satisfied with the services and the products they offer."

ANWB

With roots dating back 135 years, ANWB's mission is to help customers travel and move freely and enjoyably. Up one place in our rankings from last year, they take their members' and customers' interest to heart. The brand makes great efforts to deliver on their mission: they provide excellent roadside assistance (their core business) as well as valuable services such as driving lessons, helping seniors learn how to ride e-bikes and turning customers' cars into connected devices. This has allowed ANWB to continue to serve every customer based on their unique travel needs and contribute to a better society.

10th

"I reached out via WhatsApp to ask how I could arrange a wheelchair. I received a quick reply and was supported very well."

KLM (Royal Dutch Airlines)

With an iconic blue brand and a reputation for operational excellence and customer intimacy, KLM (Royal Dutch Airlines) took 10th place in this year's rankings. KLM's ambition to become the most customer-oriented, innovative and efficient airline in Europe, has encouraged the brand to continually focus on identifying, meeting and exceeding customer needs. Their new 'Hologram Bar', for example, allows customers to have a 3D interaction with other customers taking the same flight, but in the opposite direction, to share personal experiences.

Experiencing the power of a brand

The greatest brands don't just want to deliver a great customer experience, they also want to win their customers' hearts, minds and wallets. And that means making sure their customers understand, appreciate and engage in the brand's purpose and values.

Beyond the logo

A few years ago, common wisdom suggested that brands were defined by what they said (their taglines) and what they looked like (their logos). More recently, however, those superficial notions have been swept away. Customers recognise brands for what they do and the impact they make on the world around them; it is more about their purpose and values than their visual identity and advertising spend.

Simply put, today's brands are defined by their ability to consistently translate their purpose and values into the customer experience.



A brand:

A sum of its purpose to add meaning and distinctive value, the beliefs it creates as a result in the heads and hearts of customers, and translation into delivery of a consistent experience

The reality is that brands continue to be an extremely important element of the customer experience. Brands are critical in setting customer expectations. They are central to delivering a consistent experience. And they are key to ensuring that an organisation's products and services get noticed.

Brands also allow organisations to become more than just the sum of their products or service lines. A great brand is there at the moments that matter, delivering meaningful, distinctive and 'magical' experiences that unlock new value for customers today and tomorrow.

With this in mind, the customer experience becomes the 'fuel' of a brand. It is where organisations are able to demonstrate that their brand can deliver on its promises (measured through the Integrity pillar), that they can meet customer expectations (measured in the Expectations pillar) and that they can make their brand relatable and valuable to customers (the Personalisation pillar).

Organisations that are unable to translate their brand's purpose and values throughout the customer experience are often unable to fulfil their purpose and, as a result, customer expectations are left unmet. That can lead to challenges retaining customers, poor financial results and an overall distortion in the way customers view the brand.

Those brands that are able to seamlessly translate and integrate their purpose and values into the daily lives of their customers are the ones that stand out from the crowd. These are the brands that are able to attract and keep new customers, improve their longer-term financial value and drive new growth through enhanced customer lifetime value.

Understanding the interplay between a brand's purpose, its values and the experience it delivers is key.

Standing out with purpose

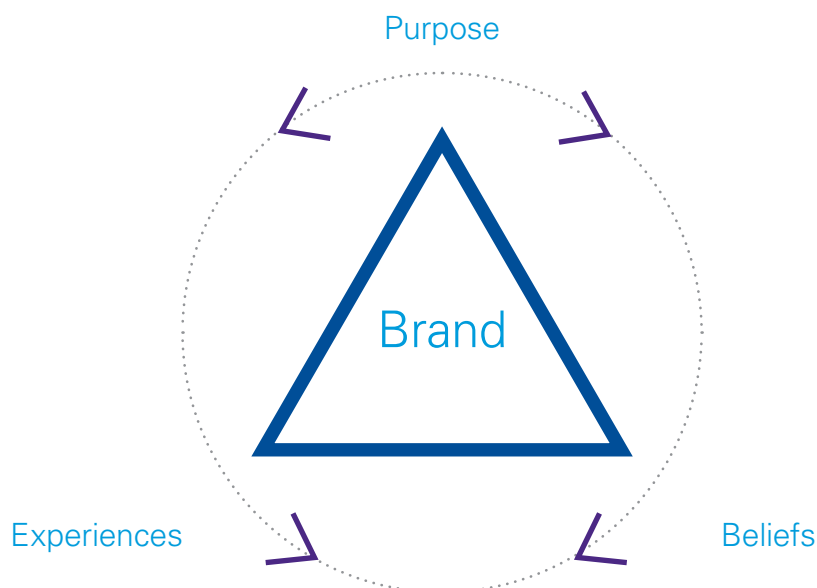
In a crowded and complex marketplace where consumers are continuously bombarded by algorithm-driven purchase suggestions, organisations need to find new ways to make meaningful differences in the lives of their customers. The future seems even more complex: the increasing role of social media platforms, live streams, platform plays and voice-activated personal assistants are already forcing brands to reconsider the role traditional human interaction plays in their customer experience.

Not surprisingly, the leading brands are exploring how their brand purpose and values might help them transcend the competition, build their social currency and differentiate themselves in the hearts and minds of their customers.



Social currency:

The entirety of a brand's current and potential value that comes from their presence in social networks and communities, both digitally and offline.



“HEMA is an amazing brand with good products and an interesting loyalty program, but also friendly and great service. Both in-shop and online.”

Respondent CEE, 2019

HEMA (ranked 56th in our research) is an example of a brand that strives to embody its promise of ‘making daily life easier and more fun’. HEMA sees its customer experience and its brand promise as the key starting points for its digital transformation efforts. By combining personalisation, customer experience and digital, the brand has created a much more seamless alignment between its online and offline experience. And that, in turn, has allowed the organisation to revitalise and strengthen its overall brand.

Another brand that leverages its values and purpose to differentiate itself is Rituals (ranked 4th in our survey). Rather than focusing on selling products, the brand aims to sell experiences and stories – an idea captured in their brand purpose of ‘transforming daily routines into special moments’. From targeted and personalised in-store experiences (such as free teas and hand massages) to dynamic and emotional brand elements embedded into their online shopping experience, Rituals aims to deliver its brand promise through ‘magical’ moments.

“Rituals surprised me from the moment I entered the shop, varying from all the different fragrances they offer to a cup of coffee and customised discount. I felt more than welcome.”

Respondent CEE, 2019

The majority of brands that are able to create a continuous interplay and learning loop between their purpose, their beliefs and their experience on one hand, and digital on the other hand, are not only adding value to their customers lives but also outperform their peers. In today's digital world, organisations must make sure every single behaviour is digitally-enabled but – most of all – that they are 'on brand'.

CX journey stage	Brand & brand promise	How they do it	What customers think
 Trigger	Transavia "Make low cost feel good"	Brand is a strategic pillar, both internally and externally at Transavia. Brands are developed internally and clearly demonstrated externally through, for example, a series of YouTube videos that show the emotional side of the Transavia travel experience through the eyes of customers and employees. The marketing campaign pops up everywhere, particularly during peak holiday seasons.	<i>"Always a pleasure. It's not Emirates but that is also not what I pay for. Great value for money."</i>
 Search	bol.com "The store for all of us"	bol.com's extensive product offerings are the result of in-depth customer analysis and a strong awareness of local and sub-local cultures and expectations. Targeted branding and offers ensure that the needs of a diverse range of customer segments are met.	<i>"At bol.com they simply have everything you need, or can possibly think of. I don't even start looking somewhere else."</i>
 Engage	Rituals "Transforming daily routines into special moments"	Every year, the brand renews nearly half its product line-up to surprise and inspire customers and employees. The brand combines day-to-day structure and out-of-the-box surprises to help customers find products and enjoy special moments.	<i>"Not a day goes by without using my Rituals products."</i>
 Purchase	HEMA "Making daily life easier and more fun"	HEMA continuously analyses activity at various touchpoints throughout the store to optimise service and reduce queues. The brand focuses on aligning their loyalty program and their online/offline experience with their brand purpose to drive engagement. Another recent example is the HEMA 'schapsscanner' that customers can use as a mobile self-service checkout option.	<i>"I consider shopping at HEMA relaxing and enjoyable. The employees are always friendly and attentive and I can ask them anything. Returning products or asking questions about the online loyalty program is never an issue."</i>
 Use	SNS "To help every single individual – in a personal way – to be financially resilient"	SNS is reversing the digital-only trend by creating bricks-and-mortar SNS 'shops' where clients will find a fixed client team to support them. The brand also uses technology to ensure that customer calls are – where possible – routed to the same employee to ensure a consistent and personal experience.	<i>"SNS takes me seriously. They are authentic, careful and thoughtful, but most of all: just around the corner and simply there for me."</i>
 Help and support	ANWB "Move and travel freely and enjoyably"	ANWB strives to provide excellent quality and service at an affordable price, to make sure they can deliver their purpose. Through their omni-channel approach they do not only want to deliver one seamless customer experience, they also use the data to personalise their offering and 'go the extra mile' when needed.	<i>"The last time we got unlucky on the road, we ended up beside the highway with our children. They made an additional effort and showed up extra fast: amazing service!"</i>
 End/Renew	Lush "We stand for fresh, handmade, vegan cosmetics that have not been tested on animals"	At Lush, they strive to do what's best for the world. This includes animal-friendly products, marching in environmental strikes, but for example also the use of 100% post-consumer recycled plastic for their products. To stimulate customers to hand in these products after using them, they launched their '5-pot-program' in which you receive a free face mask after returning 5 plastic pots.	<i>"I love buying products at Lush because they are great for my hair and skin, animals and the environment. I value that they hardly use any plastic: most products are close to zero waste!"</i>


 Rank: **9** | Movement vs last year **+1**

Walk of fame: ANWB

Driven to represent the interests of its members, ANWB's mission is to make sure people can 'move and travel freely and enjoyably'. While the mission may be timeless, the brand has remained at the leading edge by providing personalised omni-channel service and surprising, seamless customer experiences. No wonder ANWB has – once again – impressed across almost every Customer Experience Excellence pillar.

The extra mile

"Our mission provides us with direction and clarity when making choices. Although more than 135-year-old, it is still highly relevant and ensures we stay close to our true essence; our mission provides us with focus to make sure that all the products and services we offer are relevant to our members.

For example, our mission has allowed us to focus on recreation offerings that take place while our customers are moving. And it includes services like our connected home insurance, which enables our members to move and travel freely and confidently, knowing everything at home is covered. Our members trust us with these service areas. And we are constantly challenging ourselves to ensure that all our communications are aligned with our mission and brand. We always set high standards, and our goal is to provide excellent quality and service at an affordable price.

In our everyday activities, we are continually looking for ways to surprise our members at the right moments. Sometimes, this might mean paying out

claims earlier than customers expect, or proactively calling members to indicate that their car might soon run out of battery – a recent initiative linked to our ANWB 'connected car' initiative. In other cases, it might be a spontaneous tire pressure check as a service – little things that are often highly appreciated. We call this being 'unexpectedly surprising' ('onverwacht attent').

Our employees are essential in delivering these surprises. We give them the freedom to make the call when they believe a customer may need extra service. And that means we need to invest a lot of time and effort into hiring and retaining the right employees. Indeed, many of our employees are with us because they want to do good for society, help others and be part of an association.

It is not just about surprising customers. Our culture also encourages our employees to 'go the extra mile' ('helpen plus'). In everything we do, we always start by asking ourselves whether our actions will make a difference for our members.

One seamless journey

Our ultimate goal is to deliver one consistent, excellent ANWB experience. Whether our members connect with us about Travel or Insurance, across different channels or service locations, the experience should always be excellent, and in line with what our members expect from us.

To support this goal, we are simplifying processes by, for example, harmonising payment options. And we are continuing to invest into personalisation in marketing, sales and service which, nowadays, is a hygiene factor: our members always expect personal attention, with the right message, and at the right time from us. But we also go further. For example, our recent vacation preparation campaign provided members with personalised advice on specific stops, tips and insurance products to consider based on their upcoming vacation and household settings. Members loved it.

Part of providing a seamless omni-channel experience is allowing members the opportunity to decide their channel of choice. And, not surprisingly, digital is playing an increasing role. We use chatbots for things like assessing whether members have applied for the right insurance. And members use our digital roadside assistance app to report a car breakdown; the first human they deal with is often the person that shows up to help them back on the road.

We experience that our members not only highly value receiving personalised messages when interacting with us, many of them even prefer personalisation through our digital channels. They tell us they receive more insights and feel they have more control over the process which, in turn, helps us to manage expectations and achieve the

next level of personalisation. What matters most is not the channel nor the physical interaction; it is that the members feel we are there for them.

Data supports our mission by helping us align our channels and deepen customer insights. We have found our members are usually willing to share their data as long as they are clear on what it is being used for and that it results in some benefit for them – maybe increased speed of service, reduced costs or improved experiences. We also use our data to help improve the broader society, for example, warning members and municipalities about changes in road traffic. However, we are very careful about how we use and store data and we conduct frequent internal audits to ensure it is being managed appropriately.

Sense the crowd

As people's needs continue to evolve and grow, brands must also evolve if they hope to keep meeting expectations. And that includes ourselves. Fortunately, as a member organisation, we have the privilege of being very close to our members. We encourage deeper member participation and involvement through initiatives such as our User Experience Lab, where we test our new initiatives and hear feedback from members. These results are highly relevant to us as we strive to ensure that we are there for all our members, taking action only when the majority is ready for it.

However, this does not mean that we are not extremely active in early stage technology development. Our 'connected car' initiative, for example, helps us move from protection to prevention by leveraging car data to proactively inform members about potential maintenance issues or driving behaviour. We are also investing into trends such as electric mobility and voice recognition.

While we anticipate future developments and disruption, we know we need to keep testing and sensing the needs of our members across The Netherlands. That is how we can ensure we are always there for our members, today and tomorrow."

[Click here to watch ANWB's interview highlights:](#)



Marga de Jager

Board of Directors ANWB, Director Brand & Members ('Merk & Leden')

Scores vs. market average



Personalisation

+6%



Integrity

+6%



Expectations

+6%



Resolution

+7%



Time and Effort

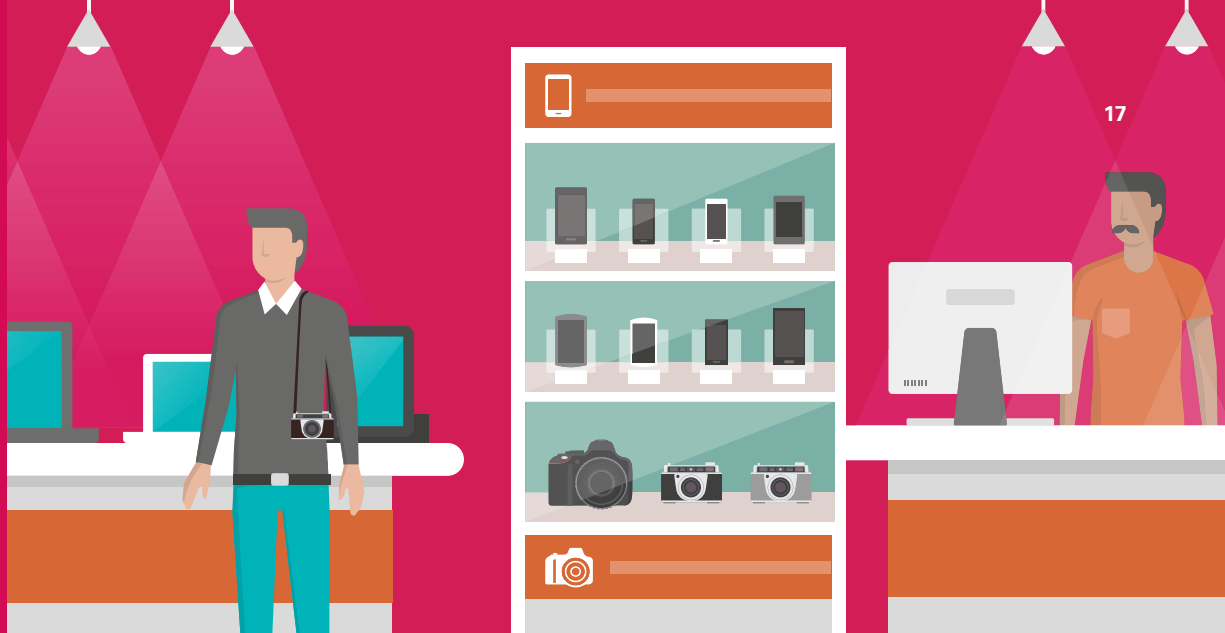
+5%



Empathy

+7%

Sector highlight: Non-Grocery Retail



These are exciting times for Dutch consumers. On the one hand, retailers in The Netherlands are increasingly experimenting with their customer experience; most now consider their customer experience to be one of their most important assets and many are investing into revitalising their 'old' bricks-and-mortar stores. But with customers now starting to put considerations such as product sustainability, brand values and emotional connections on par with product qualities and cost, the quest to respond to customer expectations is never-ending.

The non-grocery retail sector has much to be proud of. Non-grocery retailers were ranked as the second best performing sector for Customer Experience Excellence (CEE) in The Netherlands (scoring 7.32 versus grocery retailers at 7.36). The sector also dominates our rankings; seven of the Top Ten brands are non-grocery retailers. And the sector saw overall increases across all of The Six Pillars except Personalisation.

Many familiar faces can be found in our list of top retailers. Brands like bol.com (ranked 2nd overall), Lush (ranked 3rd) and Coolblue (ranked 5th) remain in the Top Ten. Others, like Rituals (ranked 4th), Pearle (ranked 6th) and Specsavers (ranked 7th) have made impressive gains to climb into the ranks of the Top Ten this year. Retailers' investments into Customer Experience (CX) is paying off. But competition remains stiff.

Getting 'phygital'

While some have been predicting the demise of the bricks-and-mortar store for years, many retailers are proving that the offline experience is far from dead. Indeed, as retailers start to refine their overall customer experience, many are starting to see the store as a key component of their seamlessly integrated customer experience.

The leading brands are combining the physical and the digital by introducing new innovations and ideas into the store experience. And that has led to a rise in the 'phy-gital' – experiential retail spaces where brands create immersive customer experiences. Nike's in-store digital fitting rooms, for example, lets customers try on products based on their personal preferences and can change elements like colour in a matter of seconds.



Simply put, retailers are working to make sure their customers leave their stores with both products and experiences. One brand that has consistently delivered memorable customer experiences is Lush. The brand is well-known for using digital technology and physical stores to deliver on customer expectations. Its 'naked store' concept, for example, offers products without any packaging at all; customers use the 'Lush Lens' app to scan the product for information in the store and feel great about their impact on the environment.

It's these types of digitally-enabled physical experiences that get customers off the couch and into the retail stores.

A greener customer

In today's retail environment, customers expect their products to be sustainable. And they increasingly select their brands based on their social and environmental impact. The leading brands are taking note and are rethinking their existing business and operating models in order to prioritise sustainability.

IKEA (ranked 16th overall) has introduced a leasing concept that allows customers to enjoy their products in their homes and then, at the end of the product lifecycle, return them to be reused, refurbished, remanufactured or recycled.

"All products are organic and that's why I think Lush is a great concept. Especially the fact that they don't use any plastic is something I find important."

Respondent CEE, 2019

The new business model not only demonstrates the brand's commitment to the environment, it also allows the brand to engage customers in a much longer-term relationship.

Coolblue is showing their environmental credentials by working to become completely climate-neutral. The brand has installed the largest solar-panel roof in The Netherlands on their warehouse; they use CoolblueBikes to deliver small packages; and they offer customers deals on 'Second Chance' products instead of throwing them away.

Our research indicates that the leading brands in The Netherlands are those that are not just talking about sustainability but acting on it.

The rise of the marketplaces

The proverbial 'elephant in the room', of course, is the online marketplaces which are changing the fundamentals of both the retail experience and the customer relationship. Marketplaces essentially facilitate transactions between third party merchants and customers; most only own a small percentage of the products sold through their marketplaces.

Perhaps not surprisingly, the top retail brand in our research of Dutch consumers is bol.com. About 40 percent of sales across the vast array of products offered on the site come from third party merchants. The company uses its customer data to deepen its understanding of their customers, optimise their offering and deliver a highly-personalised experience.

Experiments with new technologies – such as their new Voice Assistant that helps customers find the perfect gift and then adds it to their wish-list or shopping cart – is further enhancing the overall experience. For more insight into bol.com's customer experience, see page 20.

In a market where expectations are being set by the likes of bol.com, Zalando (ranked number 18) and Amazon (ranked 93rd), retailers have just three choices: they can either build a marketplace of their own, engage in an existing marketplace, or do nothing at all and fade away into obscurity.¹ And we can assume nobody wants the third option.



Building your own marketplace is a risky proposition. The technology is not all that difficult to master. But gaining enough traction to attract customers can be difficult for a new brand. Some larger, more established brands may consider this a viable strategy. Along with increased control over the customer experience and access to customer data, building a marketplace lets brands create new revenue streams and new direct-to-consumer channels at relatively low cost.

“I’m a fan of bol.com because of their enormous variety of products, quick and reliable delivery and their great service, I’ve never had any problems.”

Respondent CEE, 2019

Most Dutch retail brands have therefore opted to participate in existing marketplaces in order to extend their reach, both in The Netherlands and globally.

For example, HEMA (ranked 56th) used to sell its products exclusively through its own channels.

Now they not only enjoy considerable reach in The Netherlands through the wehkamp marketplace, they have also expended their reach into the US and Canada through an agreement with Walmart.

The obvious trade-off in selling through a marketplace rather than your own channels is that you lose control of parts of the customer experience. In exchange for greater customer reach, retailers must make peace with the fact that the marketplace will control key aspects of the customer journey. And in exchange for scalable and affordable payments infrastructure, warehousing, logistics, customer support and online marketing services, they are forsaking key opportunities to differentiate themselves.

Interestingly, while local brands like bol.com have dominated the Dutch marketplace, none of the ‘super platforms’ have seemed to get any traction in The Netherlands to date. Amazon, the only of the seven super platforms to make our Top 100, was ranked at just 93rd place. Alibaba didn’t make it into the Top 100. However, with Alibaba working to achieve a 72-hour global delivery time anywhere in the world by 2020, it seems possible that the dynamics of the market will once change again.

Hall of fame

bol.com

2

Lush

3

Rituals

4

Coolblue

5

Pearle Opticiens

6

Specsavers

7

Eye Wish Opticiens

8

Apple Store

12

Greetz

13

Hornbach

15

¹KPMG (2018). Unlocking the value of the platform economy

Rank: 2 | Movement vs last year +1

Walk of fame: bol.com

With an unyielding focus on NPS and Customer Service as one of the core values of bol.com, customer-centricity is core to bol.com's value proposition. Indeed, the online retailer's smart combination of empathy and technology is just one of the reasons that bol.com secured a second place ranking in this year's Customer Experience Excellence research.

Customer DNA

"Customer satisfaction and centrality are part of our DNA. Every single employee at bol.com uses a Net Promotor Score (NPS) as one of their key performance indicators (KPIs). The NPS KPI even shows up on the agenda at all of our company-wide meetings. Focusing on a single customer-focused KPI encourages transparency and delivers clarity to our employees. It makes us all strive to provide the best customer experience possible.

Being customer-focused means acting and communicating accordingly, even when it might mean making difficult choices. Last summer we faced extreme hot weather for weeks, and experienced issues with on-time deliveries via our logistic partner due to a record amount of large orders like air conditioners and swimming pools, as well as additional breaks for deliverers, which resulted in a drop in NPS. For the future, we wanted to take steps to prevent the same thing from happening again.

So we consciously decided to communicate possible late deliveries because of unforeseen circumstances to our customers on our website, even though we knew our transparency could lead to a drop in sales.

It was a bold statement. But it was also a good transition: clear communication is key to setting the right expectations and creating transparency with our customers. It

proved that bol.com will never give up on delivering an excellent customer experience and building long-term relationships. Making customer experience (CX) a priority in everything we do is key, and our passion for CX goes up all the way to the board.

There for you

At bol.com, we will always make sure that 'we have got your back'. We are proud of our customer service team who jump in when needed and take care of everything, no matter how challenging the issue.

Their goal is to ensure that every single customer interaction results in a satisfied customer.

However, keeping customer satisfaction at heart of the organisation can also be challenging. As a platform, we work with over 20.000 retail partners and recognise the importance of safeguarding our brand's reputation. So while we value the great opportunities and expertise of our partners and firmly believe in our strong network, we also know maintaining proper control is critical to delivering a consistent bol.com experience to our customers.

Some of our partners need support to achieve our standards. But we have found that others already have exceptional customer focus, sometimes outperforming even our own high standards.

Click here to experience
bol.com's customer
journey:



A little while ago, we had a case where a customer's piano book was delayed. Rather than just send an email apologising, our retail partner scanned the first few pages of the book and sent them to the customer so that the customer could take his first piano lesson the next day. It was a solution that we could not have delivered ourselves. It is crucial that we, together with our retail partners, meet our customers' expectations.

Tailored technology

When our CEO said "bol.com does not have customers, customers have bol.com" he was embodying our customer DNA. Today our entire organisation embraces his statement. And it shows in the way we work: even though we are really a technology organisation, we are constantly asking ourselves what our decisions mean for our customers (as well as our retail partners), how it works for them and what they might want in the future.

To ensure our products and services fit our customers' needs, we work in an agile way in which developments go live in phases. This way, we are able to continuously test our ideas with our customers and further adapt to meet our customers' and retail partners' wishes even better. Moreover, we closely collaborate with our privacy experts to evaluate what anonymised behavioural data we need and how we can provide added value to customers in return. At bol.com, we stand for trustworthiness, and we believe it is important that customers trust that they can share information with us and that we will handle their data with care.

As a growing technology firm, there is no such thing as a key milestone – we achieved our success through a process of continuous development. For example, we recently became one of Google Home's first partners in The Netherlands.

And while we recognise that few customers use the service yet, we see it as a great opportunity for us

to learn and prepare for a future where voice plays a big role.

Meanwhile, we have our "good old" chatbot Billie. We released Billie back in 2008 and have spent the past 10 years making him smarter and better. With all the data Billie has collected to date, we aim to make him the most empathic chatbot of The Netherlands and Belgium. We are constantly searching for new applications for Billie, such as being able to take care of product returns.

Our app is also becoming much easier to use and that is delivering an increased rate of returning customers and customer satisfaction. Customers are surprised they can order an item with just two clicks at bol.com. Our app is also highly appreciated by our customers, and is rated one of the best retail apps in the Netherlands.

Making a difference

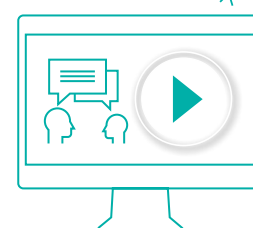
In the near future, we believe the interplay between automation and human touch will become increasingly important – and ultimately the standard. Automation will play a bigger role in our lives, making it even more important for brands to know the optimal moment to transition customers from technology to human interaction.

Being able to sense this properly is crucial: customer expectations and dynamics are increasing; customers expect to be comfortable with the entire experience. Yet, at the same time, organisations need to be able to stand out and differentiate themselves at the moments that matter, delivering experiences that matter. That means we need to be more proactive than ever in offering the right level of empathy along a customer's journey.

Looking at our own future, we are all working towards a common goal. While the board sets overall goals, it is our teams that are responsible for detailing and executing the implementation of those goals. That shows our trust in our teams who,

ultimately, are the true experts in their areas. Given our roots as a start-up, it is not surprising that our culture of autonomy, entrepreneurship and personal responsibility is still strongly reflected in the DNA of our organisation. Indeed, our willingness to give our teams the room and responsibility they need to make their own choices, and our continuous encouragement to go beyond limits, is not only what makes it a true pleasure to work here – it is also how we will make a difference for our customers. Now, and in the future."

[Click here to watch bol.com's interview highlights:](#)



Otteline van der Feltz

Customer Service Director
bol.com

Scores vs. market average



Embracing consumers' digital footprint

To win in today's crowded marketplace, organisations need to be close to their customers. They need to understand their needs and desires. And they need to be in the right place, at the right time and on the right device to meet their customers' expectations. Embracing the full digital footprint of consumers will be key to success.

Imagine your uncle's 60th birthday is coming up. You don't see him very often and so you don't have a specific gift in mind for him. Picking up your smartphone, you search "birthday present man sixty" in Pinterest and get back a picture of a mug that says "Celebrating the 39th anniversary of my 21st birthday!". The gift seems perfect so you click on the link which directs you to Amazon. While there, you explore a few other mug options but ultimately decide to stick with the original mug. Back on Pinterest, you select a card that says "SIXTY is only 15 in Scrabble" and click on the link to order it from Ebay. Both items arrive a few days later, well in time for your uncle's birthday party.

Now consider the trace of data your activity may have left behind. It's not just the active data that you are often aware of – things like social media posts, likes, shares and comments or searches on Google or Pinterest – it's also the more passive data that is shared every time you visit a website or interact with a digital asset. Together, these types of activities form a 'digital footprint' of data points. And few customers or users truly understand the extent of the data they are creating and sharing and how it is being used.

An analyst firm estimates that there will be more than 20 billion devices connected to the internet by 2020; at that point there will be approximately four devices for every human being on the planet.

Gartner

All signs suggest that the depth of the digital footprint is only going to expand over the coming years. The rise of the Internet of Things (IoT), for example, will add massive amounts of new data to people's footprints as more and more gadgets and objects (like Fitbits, Google Home devices and smart security systems) become enabled. Gartner, an analyst firm, estimates that there will be more than 20 billion devices connected to the internet by 2020; at that point there will be approximately four devices for every human being on the planet.

Step into their shoes

The opportunity for organisations and brands to learn from this data – to embrace the digital footprint – in order to deliver the right message at the right time and on the right device is tremendous. Brands are increasingly able to provide customers with a unique, tailored experience.

In Mexico City, for example, Burger King recently used real-time customer data from GPSs and other sources to identify which customers were currently stuck in traffic. They sent out a push notification offering ‘traffic jam Whoppers’ – drivers could order the burger through the app and have it delivered right to their car.

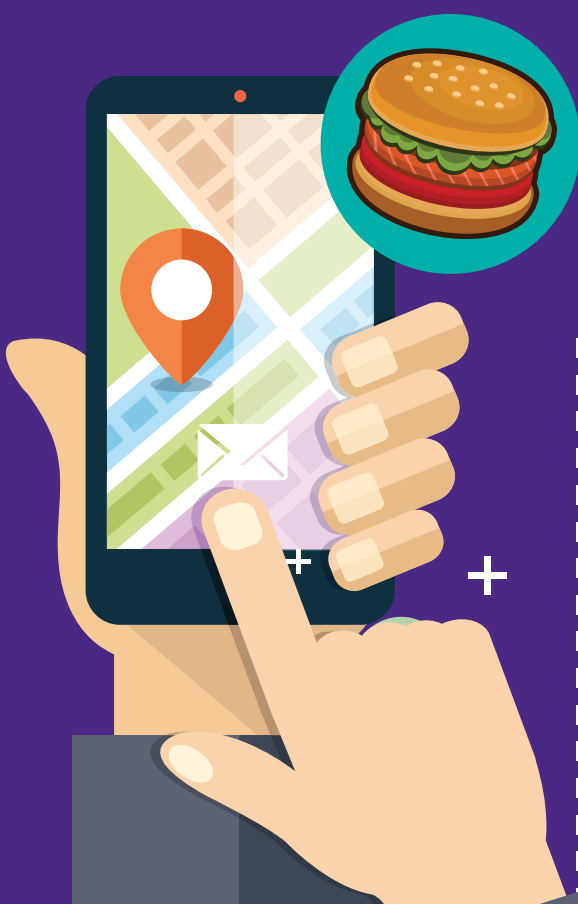
The app also showed how long they might be stuck in traffic and updates about their food delivery in progress. Using customer digital footprints, Burger King was able to be in the right place at the right time on the right devices.

While a customer journey traditionally starts with a ‘search phase’, Burger King’s experience clearly demonstrates that brands are now able to ‘trigger’ desires in their customers by predicting what they might need at a particular place and time. Offline channels are also using digital footprints to trigger in-store decisions by, for example, installing ‘smart mirrors’ that are able to make recommendations based on the specific customer in the fitting room.

We also see a growing number of brands using customers’ digital footprint data to improve and enhance the overall customer experience. ANWB – ranked 9th overall in our research of customer experience – offers customers a dongle that transforms cars and motorcycles into connected vehicles.

Data collected from the device is used to provide drivers with valuable insights about their driving behaviour, their vehicle’s fuel consumption, the condition of certain parts in the vehicle as well as early notifications of potential upcoming issues.

What these examples, and a growing number of new applications, demonstrate is the importance of being in the right place at the right time and on the right devices. For brands, that means embracing the digital footprint.



In Mexico City, Burger King recently used real-time customer data from GPSs and other sources to identify which customers were currently stuck in traffic. They sent out a push notification offering ‘traffic jam Whoppers’ – drivers could order the burger through the app and have it delivered right to their car.

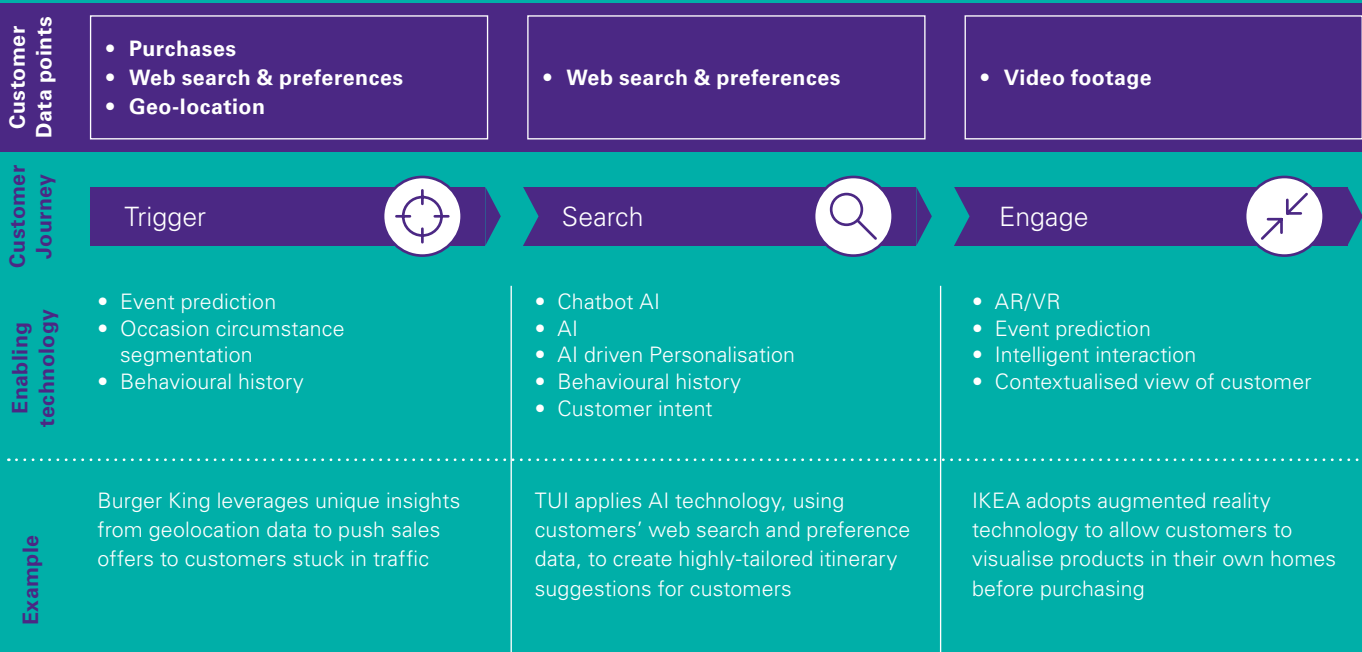


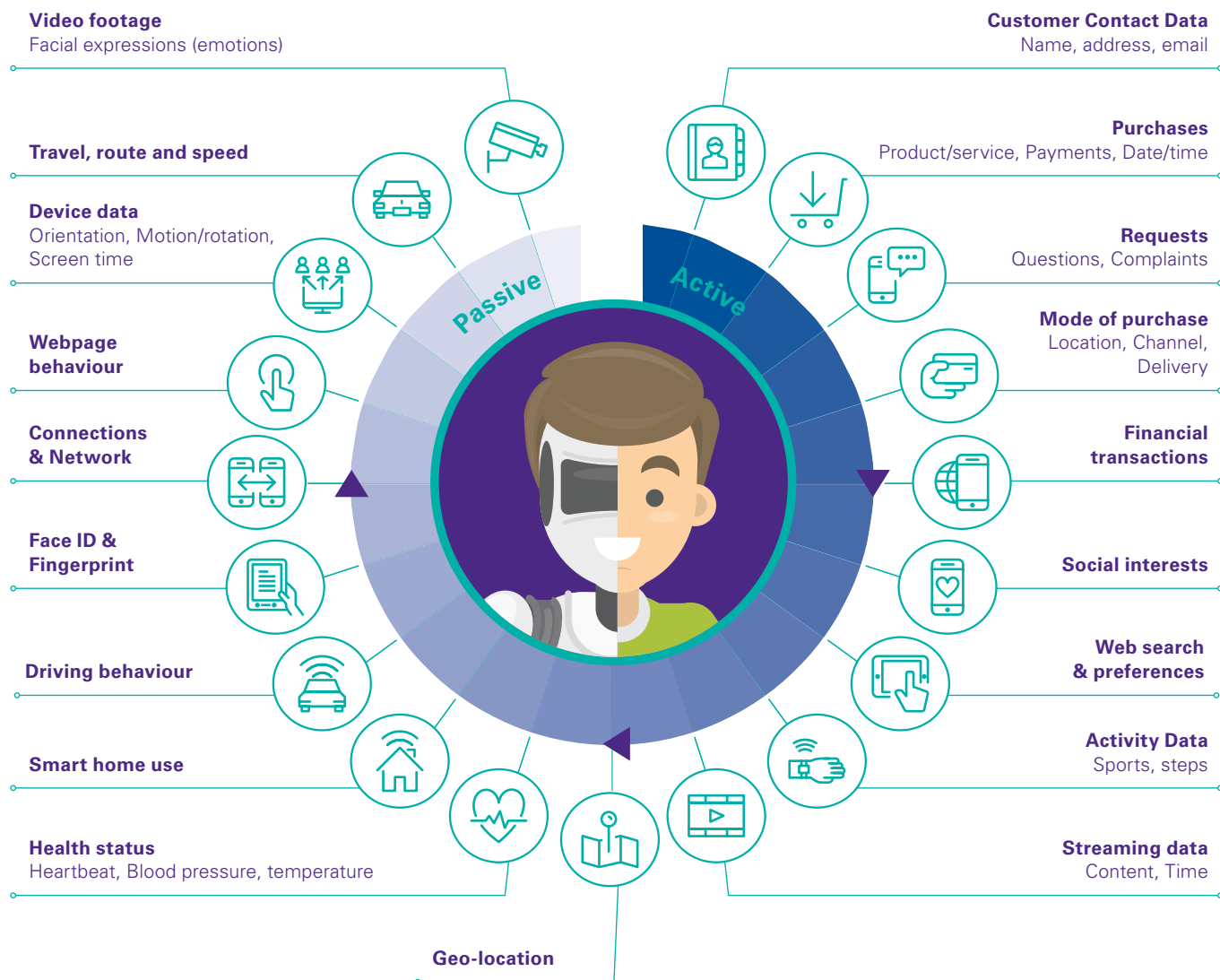
A digital footprint in a 'phygital' world

Consumers are using digital technologies to communicate, find and share information and entertain themselves. But, as they do, they are leaving behind a trail of data points. Combined, these data points form a consumer's 'digital footprint'.

Some of this data is actively shared – for example, when you input your address in an online registration form. Other data points are left passively – things like mouse movements and device orientation. Yet each of these potential traces of data helps build a more robust view of the customer and their activities.

While the creation of digital footprints may be intimidating to some, many organisations are finding ways to leverage their customers' digital footprints to help create the ultimate 'phygital' experience where digital is seamlessly integrated into the physical customer experience. Simply put, the leading brands are capturing and using their customers' digital footprints to the customer's advantage.





<ul style="list-style-type: none"> • Customer contact data • Purchases • Geo-location 	<ul style="list-style-type: none"> • Driving behaviour 	<ul style="list-style-type: none"> • Customer contact data • Requests • Web search & preferences 	<ul style="list-style-type: none"> • Web search & preferences • Requests
Purchase	Use	Need help	End/Renew
<ul style="list-style-type: none"> • 4D printing • Real time voice sentiment analysis • Computer vision • Preferences • Virtual assistants 	<ul style="list-style-type: none"> • Proactive help • Remote monitoring • Remote diagnostics feedback 	<ul style="list-style-type: none"> • Remote diagnostics • Anticipatory service • Live agent AI • Bots and AI 	<ul style="list-style-type: none"> • Needs and wants • Predictive analytics • Next best action
<p>Amazon smartly combines AI, computer vision and sensors to create a seamless shopping experience for customers, in which checkout lines are no longer needed</p>	<p>ANWB uses a connected dongle to collect driving behaviour data to notify customers of potential upcoming issues</p>	<p>Lemonade digitises the insurance claim process using bots and AI, to make the process less cumbersome and time consuming for consumers</p>	<p>KPN leverages AI driven predictive analytics to drive relevant next best action (driving down churn rate)</p>

Customer-led, technology- enabled

The customer experience must be digitally enabled. But that does not mean brands should be investing into every new technology. Indeed, our research suggests the leading brands in The Netherlands are the ones putting their customers at the heart of their technology decision-making.

i

61%

of organisations that are effective at using digital technologies enjoy higher revenue growth than their competition.

Source: Harvey Nash and KPMG (2018). KPMG CIO survey 2018

The growing role technology plays in the customer experience cannot be easily denied. Organisations are using digital developments to deliver unprecedented levels of connectivity and speed to customers. They are using technology to access, process and analyse huge amounts of customer data, leading to greater insights around customer expectations, behaviours and intentions.

Customers are also embracing technology within the customer experience. They often see the value that technologies like Artificial Intelligence (AI), machine learning and predictive analytics add to their day-to-day lives.

It's 'digital Darwinism'; the only real options are to adapt and evolve or die. And our view suggests it will be the brands that are able to deliver a smooth, digitally-enabled customer experience that will emerge stronger in the future. It's brands like Uber and Netflix, who take a customer and digital-first approach, who are thriving; brands like Blockbuster and Kodak failed to adapt to the new reality.

Start with the customer

Our experience suggests that the current pace of technological change has left many decision-makers feeling overwhelmed. Most are struggling to decide which technologies and tools are right for their organisation. And our view indicates that the leading brands are those that adopt the right technologies for their customers – they are customer-led rather than technology-led.

As Steve Jobs once famously noted, "you have to start with the customer experience and work backwards to the technology".

Unfortunately, many business leaders seem to have ignored this wisdom, allowing their organisations to rush into digital transformation programmes without first understanding their customers' future needs and expectations. As a result, they tend to fail to invest into those aspects of the customer experience that matter most.

In this environment, organisations must remember that digital innovation – in and of itself – does not guarantee success; rather it is how new innovations and technologies are combined to create a seamless fit around the organisation's brand purpose and how they improve the customer experience that creates differentiation.



The bottom line is that digital transformation is both an opportunity and an absolute necessity in today's customer-centric environment.

Technology-enabled CX

By exploring the customer journey through the lens of The Six Pillars of Customer Experience Excellence, organisations are able to target the parts of their customer experience and prioritise technologies that will deliver the greatest value for their customers.

IKEA, for example, has successfully used technology to target the Personalisation and Expectations pillars by enabling their customers to view their products in their own homes before purchasing. Using augmented reality (AR), IKEA's tool allows customers to capture their living space and then place different 'virtual' products into it to see how they would look. In doing so, IKEA has recognised that customers often struggle to visualise their products outside of the store and this has led customers to either postpone purchases or not make them at all.

In creating its brick-and-mortar chain of convenience stores, Amazon used technology to target the Integrity and the Time and Effort pillars.

Their approach recognises that customers do not want to spend time waiting in lines to pay and so they have focused on removing the checkout line altogether. Using a combination of AI, computer vision and sensors, Amazon Go stores track which customers take which products from the shelves. As the customer leaves the store, their Amazon account is automatically charged for the items they took.

Travel platform TUI has used technology to target the Personalisation and Time and Effort pillars in order to help customers create better vacations with less effort. The brand uses AI to match customer's personal preferences against a deep ocean of historical travel data to create highly-tailored itineraries for their customers. Beyond travel and accommodation recommendations, the brand also uses the data to suggest TUI or third-party excursions, restaurant recommendations and ideas for activities. In doing so, TUI not only saves customers time but also helps them create more enjoyable vacations.

Lemonade – an insurance start-up with ambitions to enter The Netherlands – is using technology to target the Integrity and Time and Effort pillars. They recognise that the insurance claims process is often seen as cumbersome and time consuming for consumers. Using bots and AI, the brand has re-imagined the process, taking the customer experience as the starting point. By digitising the experience across the front, middle and back office, the brand has been able to transform the experience and reduce the claims time down to a matter of seconds.

The bottom line is that digital transformation is both an opportunity and an absolute necessity in today's customer-centric environment. But that does not mean that decision-makers should be blinded by every new technology; the leading brands are those that stay on course, investing only into those technologies and tools that help them move towards the experience they know their customers will want in the future.

The thin line between cool and creepy

Customers are keen to embrace new, data-driven, personalised and user-friendly technologies. But they also tend to worry about how their data is being used and secured. According to a recent survey by KPMG, customers are often more concerned about how their retailer is using their data than they are about their data being stolen by external hackers.¹

If brands hope to retain customer trust, therefore, they must be able to clearly and effectively manage expectations about what data is being used and how it benefits the customer.

In a different global survey of CEOs by KPMG conducted earlier this year,² three in five respondents agreed that protecting customer data had now

become one of their most important jobs as CEO.

Brands must remember that securing customer data is only part of the job. They must also make sure it is being used appropriately and to the customer's ultimate benefit.

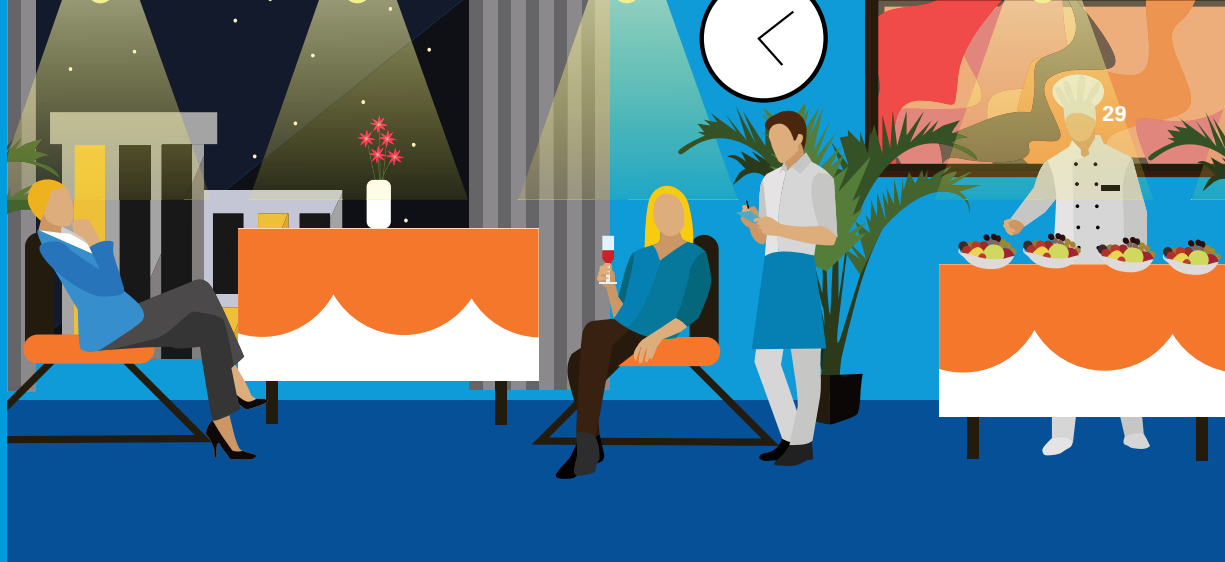
They should be asking themselves how far they can go before their analysis starts to become intrusive – in other words, where the line between cool and creepy lies. And they should ensure they never step over it.

Our view suggests those organisations able to predict and exceed customer expectations without becoming creepy will gain clear competitive advantages in the fight for the digital consumer.



¹KPMG (2018). Consumer Loss barometer

²KPMG (2018). CEO Outlook 2018



What's on the menu?

Restaurants and fast food providers in The Netherlands aren't just dealing with changing customer expectations and desires, they are also facing an increasingly competitive landscape. While the sector remains true to the slogan of "customer is king", it struggles to keep up with sector dynamics and customer needs. New players, new technologies and new trends are increasingly shaping the customer expectations. As the leading brands in our research illustrate, however, it is possible to deliver faster and better food service, ticking all the boxes to deliver the optimal food and customer experience.

Customer appetites and expectations are changing. And Dutch Restaurants and Fast food brands are taking big steps to respond. Indeed, the sector saw its overall Customer Experience Excellence score rise to 7.22 in our research this year, up from 7.15 last year.

Clearly, the sector still has a long way to go, particularly when you consider that consumers now compare their experience against every other sector they interact with. That being said, many of the leading restaurant and fast food brands in our research improved their year-over-year ranking, suggesting significant improvement over the past year. Subway, the leading brand in the sector, moved from 81st place in 2018 to 59th place this year; La Place moved from 94th place last year to 67th place this year; both notable improvements.

The rankings do not tell the full story, however. We see evidence of great innovation and customer-centricity in the market – new technologies are being applied across the customer journey; innovative speciality menus are being offered; and unique experiential new food concepts are being rolled out. Our view suggests many leading restaurants and fast food brands in The Netherlands are working hard to feed the customer's hunger for better dining experiences.

An appetite for technology

The rise of mobile delivery apps, shifting customer technology preferences and new service options are rapidly changing the Dutch restaurants and fast food market. The leaders are the ones that are embracing these changes as opportunities – creating technology-infused and differentiated experiences that keep the customer coming back for more.



“Went home the other day after a Subway visit feeling great! Cheerful people behind the desk that were sincerely interested in having a conversation and asking me how my day was.”

Respondent CEE, 2019

McDonald's, for example, has normalised the use of self-ordering kiosks in fast food restaurants. Its move towards direct home delivery services are fully 'in line' with the new delivery landscape. And their recent investments with new technology providers suggest the brand will continue to enhance its technology capabilities and customer experience.

While it may be some time before robot chefs prepare and serve food to customers in a matter of seconds, we see efforts by global brands to improve the speed and convenience of food delivery. In some cases, advanced payment options and curb side services are being offered, allowing customers to order through the restaurant's mobile app and online platforms, pay online with digital currencies, and have the food delivered right to the car window. Burger King has refined the service into its 'Traffic Jam Whopper' in some cities in the US and Mexico – delivering hot food to cars that are stuck in traffic.

Technology isn't just being used to reduce customers' Time and Effort. It is also being leveraged to enhance Personalisation. [Thuisbezorgd.nl](https://www.thuisbezorgd.nl) (number 70 in our overall ranking) allows customers to save their favourite orders and restaurants in their account. On future visits, customers can then reorder a previous favourite with just two clicks on the app.

La Place uses its app to improve its Time and Effort and Personalisation scores by providing special, personalised promotions to their online app users. Starbucks (ranked 73rd this year) uses AI in its stores to predict customer preferences based on a number of factors such as store location, weather conditions and user preferences.

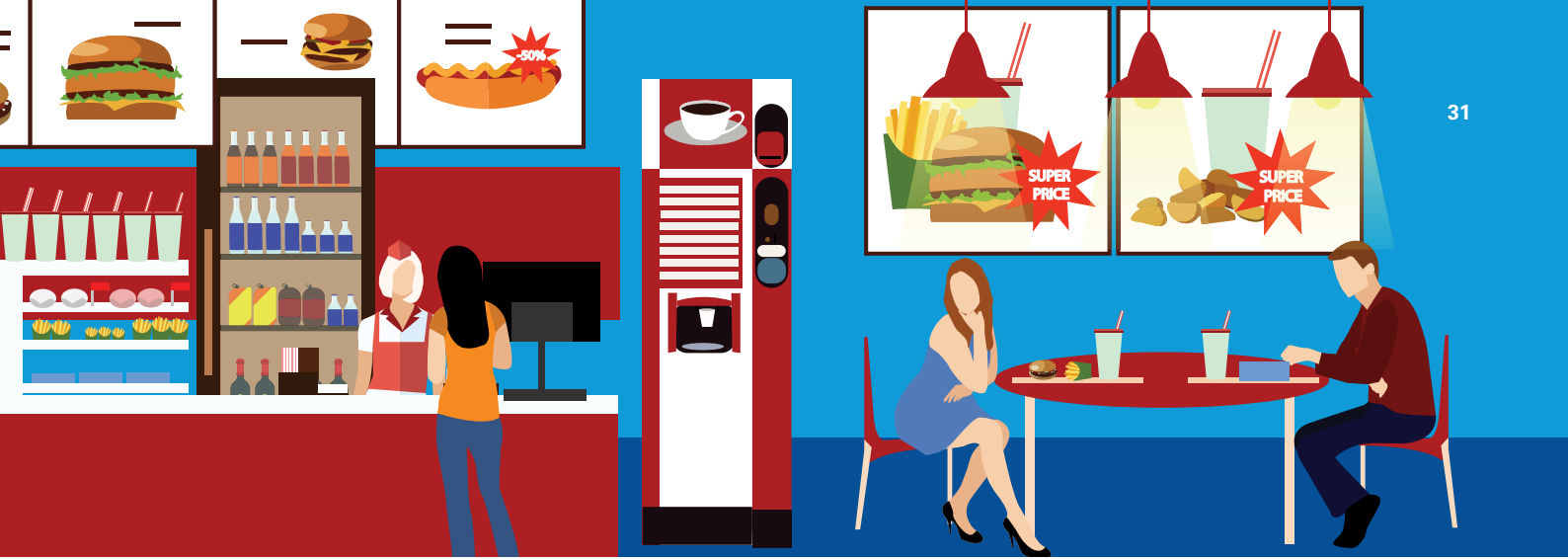
Feeding the mind and body

The way people order food is changing. But so, too, is their expectation of the products they order. Indeed, today's multi-dimensional customers are often willing to pay a premium for convenient, sustainable and flexible food options.

In part, this is playing out in the shift from fine dining to more fast, casual dining. But customers are also looking to be more conscious in their dining choices – prioritising things like healthier specialty products offered in sustainable packaging with zero-waste policies. A number of newcomers have taken advantage of the void in the marketplace by offering new product ranges. US-chain Sweetgreen, for example, is widely viewed as a true lifestyle brand due to its healthy and sustainable plant-based menu and its investment into community services such as nutrition education.

Responding to these changing customer demands can be challenging. Domino's Pizza (ranked number 83) aspired to be the only Dutch pizza brand offering certified gluten-free pizzas. However, significant slowdowns in operations have made the brand decide to shelve those plans for now.

While there have been many similar trials and pilots that have failed to move the meter – often due to either a lack of understanding of the market or unexpected costs and bottlenecks – the vast majority of brands continue to invest into meeting the more specialised needs and expectations of their customers.



“La Place’s self-service concept is fast and good. I often use their app as well, which gives me a quick overview of special promotions!”

Respondent CEE, 2019

Some are working to improve their sustainability through certifications, improved employee training and waste reduction programs (particularly the removal of packaging from the value chain). Others, like Too Good To Go, are taking a more direct approach by offering customers a ‘magic box’ that contains a selection of near-expiry food items at a discounted rate to fight food waste.

What exactly IS a restaurant anyway?

At the same time, some Restaurants and Fast food brands are also starting to experiment with the entire store concept. One of the more radical concepts being tested, for example, are ‘ghost restaurants’ that have no physical customer touchpoints except for the delivery. By reducing real estate costs and improving control over the value chain from inventory management through to orders, sales and delivery, the concept is offering convenience to customers, often at reduced prices.

Experience to date, however, suggests that building a brand in this sector without a physical presence remains challenging.

The importance of delivering an excellent offline experience is well understood by Starbucks. They are taking a more radical approach to improving its offline experience and winning back traditional customers by almost completely eliminating their online retailing and developing ‘Reserve Roasteries’ initiatives in favour of focusing on creating a more emotive and distinctive experience in-store.

What is clear is that delivering on customer expectations in today’s Dutch marketplace will require brands to bring together both digital and physical experiences. Given the significant investments many brands have been putting into improving their customer experience over the past few years, we expect to see the sector rise further up the rankings soon.

Hall of fame



Walk of fame: Picnic

Picnic doesn't just deliver groceries, they deliver on customer expectations. And that has allowed them to fundamentally change the way Dutch customers shop for groceries online. Super-convenience, smart use of technology, friendly runners and trustworthy service teams are just some of the reasons that Picnic impressed and entered our Customer Experience Excellence rankings this year.

Customer-led convenience

Picnic is super convenient. Our customers can place an order in just three minutes and are able to make repeat orders quickly and easily based on previous orders. Our app is simple and intuitive, but on the back-end we use a lot of technology, data and Artificial Intelligence (AI).

Consider, for example, how different customers might search for cheese: some might look for it in the dairy section whereas others may consider it a sandwich spread. AI allows us to adjust the location of cheese to the individual customer's preferred location for future visits. Similarly, if we notice you're not interested in pet food and probably don't have cats, we will not show cat food in your standard view. Our ability to leverage customer data enables us to provide a better and more seamless customer experience.

However, we need to make sure that our use of customer data is always for the benefit of the customer and that our customers continue to trust us with their data. That's why we have a Golden Rule in how we use data and develop our services: every change we make needs to be to the customer's advantage. For example, when customers are ready to order, it would be super easy for us to ask if they need tomato sauce to go with their spaghetti order. But we don't, because we know customers find it annoying. They just want to finish their order.

At Picnic, we develop everything with the customer in mind and in close collaboration with our customers. When we started in Amersfoort for example, we invited 400 families to test our app. And it was amazing to hear their feedback. During one of the town halls, for example, customers asked why it was not possible to know exactly when their groceries would arrive.

That prompted us to come up with the 'Grocery radar' ('Boodschappenradar') which shows customers in real-time when their groceries will be delivered.

Our grocery radar is just one example; we involve customers on a continuous basis. In fact, every week, we invite customers to our offices to test new features or assess new product assortments.

Trust and feedback

The online grocery market can be challenging; customers need to receive their full basket of products, all in high-quality, and often stored at different temperatures. And when something goes wrong, we need to fix it properly and promptly.

One way we do this is by trusting our customers. And 99.9% of customers can be trusted. Our customers don't need to provide evidence of their brown bananas, for example; we trust them and simply refund.



But it doesn't stop there: if we start to see multiple similar complaints we dive into the details to find the cause and solve it. In the case of the brown bananas, we quickly found out that the issue was isolated to just one specific distribution hub where, as it turned out, the temperature our bananas were being stored at was two degrees too high.

Knowing the root cause of customers' complaints enabled us to solve the banana issue, reduce waste and improve customer satisfaction.

We appreciate customer feedback, and need it to further improve our services. That's why we make it as easy as possible for customers to provide feedback. When customers miss a product in our assortment they are looking for, they can click a 'request' button in our app and, if there are a couple of other people that also want it, we add it to our product assortment, ensuring our assortment is aligned to our customers' needs. Our teams respond to customer questions or issues in just a few minutes in most cases – not a chatbot, but real people. Our customers really appreciate the human interaction and we really appreciate their feedback.

In our customer journey, the moment of delivery is key: it is the only real physical, personal interaction customers have with our brand. That's why we try to ensure that our runners are the 'ideal son-in-law or daughter-in-law' type. They are nice and self-motivated. If an issue does come up, we don't want them to tell customers to send us an email or call our customer service; no, we need runners to think like the customer and fix issues on the spot if needed. Little things also matter deeply to our employees.

For example, if runners see toys in the front garden but it's rather late at night, they knock on the door instead of ringing the doorbell so as not to risk waking up any sleeping children. It's this mentality we're looking for in our runners. And it's this approach that makes sure our customers are happy with their delivery.

A better tomorrow

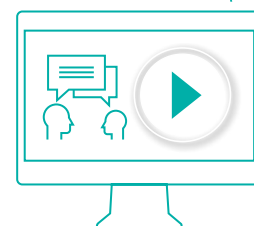
We are proud of the multiple milestones we have achieved so far. From our launch in Amersfoort, we have expanded to many other cities across The Netherlands and now Germany. Our 'Grocery Radar' ('Boodschappenradar') is highly valued by our customers. So, too, is the development of our electric delivery vans.

Sustainability is part of our vision, but we don't make a big deal about it. For us, it was important to make impact first, and explain how we create a more sustainable world second. Last year, for example, we launched our Summer Update to customers; it provides each customer with an individual overview of how much CO2 they saved based on their orders with Picnic.

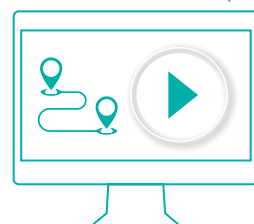
Looking to the future, we want to become even more sustainable. And we are exploring a number of new ideas going forward. For instance, we started a pilot with wehkamp to collect webshop returns when we deliver groceries. Customer feedback suggests they really like the idea; it's convenient and sustainable at the same time. Looking at the whole supply chain, there are many ways to improve sustainability by improving packaging for instance. There is so much to win, since we've created a completely new model.

We want to make a sustainable impact, for and with our customers."

[Click here to watch Picnic's interview highlights:](#)



[Click here to experience Picnic's customer journey:](#)



Michiel Muller

Co-founder Picnic

Ruben Vermijs

Digital marketing leader

Scores vs. market average



Personalisation

+1%



Integrity

+3%



Expectations

+5%



Resolution

+9%



Time and Effort

+1%



Empathy

+9%



Sector highlight: Banking



Banks lagging CX battle

The competitive landscape for banks continues to change. Challenger banks are gaining traction in Europe based on their exceptional customer experience; BigTech players are using their data and insights to offer highly-relevant banking and payments solutions to customers; FinTechs are using new regulations like PSD2¹ to bring innovations to market faster. At the same time, other sectors outside of Financial Services are redefining customer expectations. No wonder customers are becoming more critical of their banks' services.

In today's competitive marketplace, standing still is the same as falling behind. And when it comes to improving the customer experience, the banking sector in The Netherlands is standing still. The banking sector – on average – posted the same score as last year in the overall Customer Experience Excellence rankings.

Other sectors posted impressive gains. As a result, the banking sector is falling behind. On average, banks in The Netherlands fell 17 places in our ranking. No bank managed to make it into the Top 20 this year. Of the five brands that experienced the greatest fall in our research, four are banks.

So while Dutch banks seem to have been placing significant focus on improving the customer experience – enhancing performance, breaking down organisational siloes and pursuing an increasingly digitised customer journey –

Dutch consumers do not think they have gone far enough.

Why are Dutch banks falling behind? And what should they be focusing on in order to deliver the type of customer experience that meets expectations and retains loyalty?

Looking into the future

To get a better understanding of how the dynamics are changing, it is worth looking at the most recent CEE results for the UK. The UK is widely seen as the breeding ground of FinTechs – brands that are able to capitalise on their lack of legacy infrastructure and highly-agile operating models to deliver exceptional customer experiences. So it is worth telling that two of the Top 3 brands in the UK are so-called challenger banks (First Direct took first place and Monzo took second place), yet only one of the 'Big 4' (Lloyds) managed to make it into the Top 100.



“I have recently opened a savings account at ASN Bank because I can relate to their mission. And I’m always treated friendly and correctly”

Respondent CEE, 2019

Last year, we saw some of these challenger banks broaden their footprint to expand into mainland Europe. So while they may not be capturing much market share in The Netherlands today, we expect their influence will soon be felt by Dutch banking brands as their customers start to demand similar functionality and experiences in the near future.

Working for a purpose

ASN Bank still leads the pack in banking in The Netherlands (ranking #28 overall), suggesting that strong values and a clear purpose continues to motivate Dutch banking consumers. In our research, customers indicate they appreciated that ASN Bank was “good for the environment” and that they could “understand and value their vision and philosophy”.

Another example when it comes down to purpose-driven business is Triodos Bank. Their mission is to “make money work for positive change” as they strive for positive, social, environmental and cultural change through community-driven offerings and a sustainability-led lending strategy.

Others are picking up on the trend. Rabobank’s ‘Banking for Food’ and ABN AMRO’s ‘Finance the Future’ purpose both speak to a higher vision than simply delivering shareholder returns. However, compared to ASN Bank and Triodos Bank, our view suggests the big banks still have some way to go before they convince customers they are truly purpose-driven.

Balancing digital with personal

Dutch banking customers are clear about what makes an experience excellent: it’s Personalisation. Yet our research shows that all banks are underperforming in this important area.

Banks strive to critically balance their data security and GDPR requirements against their use of customer data. And recent cases with ING and ABN AMRO suggest that the Dutch Data Protection Authority is taking potential transgressions seriously.

At the same time, our research shows that most customers have a preference for online banking, and predominantly app. But as customers indicate, it is not a differentiator anymore: “I use the mobile app and it works”, and “I manage everything online, and have not experienced issues so far”.

But Personalisation has as much an offline as a digital angle. Our research clearly illustrates the importance customers place on personal contact. Some customers noted frustration with the lack of omni-channel customer management (“Via the website chat I have asked a question but they couldn’t answer. I had to call a phone number and wait 30 minutes, then they still couldn’t help me. That’s 30 minutes lost forever”). Others cited more positive elements (“I enjoyed the proactive thinking of an employee in a branch”).

Challenger banks like Revolut and N26 are shifting customer expectations for personal contact. They offer premium subscriptions that include things like premium personal support, concierge service and priority customer support with dedicated phone and chat lines. Traditional banks will need to rethink their approach if they want to compete.

¹Second version of the Payment Services Directive that replaced PSD in 2015. This initiative is administered by the European Commission in order to regulate payment services and providers throughout both the European Union (EU) and European Economic Area (EEA)



People deliver the personal touch

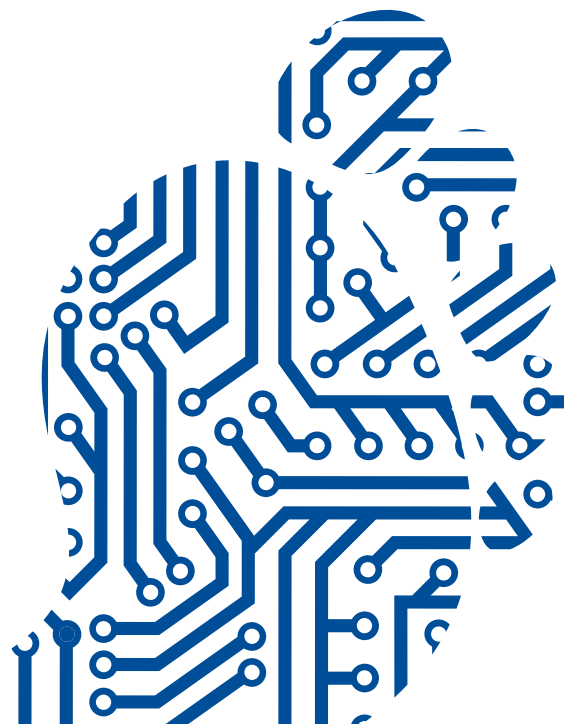
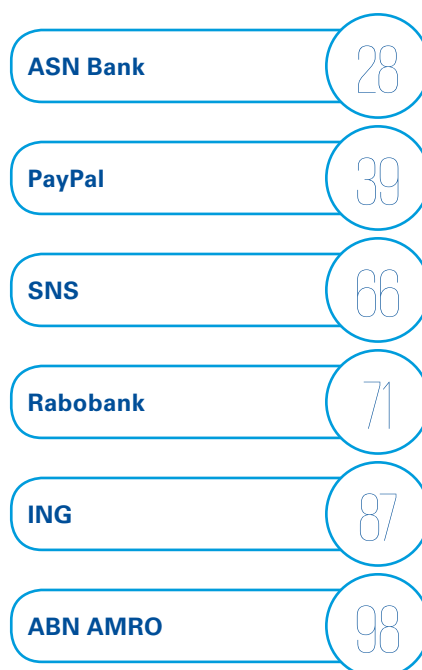
While technology plays a key role in delivering on the customer agenda, it is the bank's employees that are at the centre of delivering the customer experience. That is why some banks – such as First Direct in the UK – are refocusing their recruitment criteria to prioritise 'caring professionals'. First Direct wants to "hire for the smile and train for the skills".

Ask yourself this: when was the last time your HR Director, your Customer Experience Director, your Chief Marketing Officer and your Operations Director got together to talk about the customer experience and the employee experience? If you are like most organisations, the answer is probably never.

However, our view suggests that both the employee and the customer experience need to be connected across the front and back office; the experiences are mutually interdependent and tightly intertwined – managing the connectivity between them is now a vital organisational competency.

Those looking for inspiration may want to examine First Direct or Transavia where top management is evaluated on how well the employee and customer experience is interconnected. ASN Bank's efforts to ask all employees to keep the customer at heart is another good move in the right direction. And maybe this will be the trigger that will push the Dutch banking sector back up the leader list next year.

Hall of fame





Sector highlight: Insurance



From 'one-size-fits-all' to 'fit for purpose'

As the availability of data starts to open up new opportunities and insights for insurers, many of the leading brands in The Netherlands are taking advantage to the customers' benefit. Yet the journey is only just starting – Dutch insurers will need to step up their transformation efforts if they hope to be able to quickly respond to shifting customer expectations and provide timely, value-added and personalised customer experiences. In this environment, the brands with the most customer-centric, data-driven and digitally-enabled business models will win.

While the Financial Services sector is doing relatively well with a fourth place, insurers need to step up their game given the fact that banking surpasses insurance on all of The Six Pillars except for Integrity. Customers have never considered insurance to be the most exciting of purchases. But that hasn't stopped some Dutch insurers from trying to change their minds. Indeed, our ranking of Customer Experience Excellence (CEE) in The Netherlands shows there are a number of brands that are finding unique ways to satisfy their customers.

Centraal Beheer, our leading sector brand (and ranked 17th overall), is widely recognised as being one of the most customer-centric companies in both the private and commercial insurance markets. In part, their success is driven by their efforts to make their employees directly responsible for customer experience.

Centraal Beheer is also winning customer hearts and minds through the introduction of new customer-oriented products and services, such as their 'Handyman' ('Klushulp') that provides an online platform to easily book a local craftsman for home repairs.

Another innovative insurer – FBTO – was ranked second place amongst insurance brands. Their focus on improving the customer experience and co-creating new propositions with customers has helped them move up 29 positions in our CEE Top 100 this year. The brand scored well across all of The Six Pillars, particularly in the Time and Effort and Expectations pillars.

Getting personal

With customer expectations for a personalised experience at an all-time high, many brands are now working to better understand their customers' expectations, anticipate their specific needs and adapt the experience accordingly.



“I had a small accident while at my son’s house. I called Centraal Beheer’s and told them I was there because I had just become a grandfather. Two days later I received flowers at home from Centraal Beheer, expressing their best wishes. Great, right?”

Respondent CEE, 2019

Simply put, the sector is trying to move from the ‘one-size-fits-all’ approach of the past to a ‘fit-for-purpose’ approach that is tailored around the individual customer.

The opportunity for insurers to impress is great: insurers are often involved in their customers’ most important life events – buying a new house, getting married or having children, for example. And these are the times where a highly-personalised and empathetic experience can make a key difference in the customer relationship.

Interestingly, while the value and importance Dutch consumers place on Personalisation has increased versus last year, the overall average for the sector in this pillar remains unchanged. This suggests Dutch insurers have some ground to cover to meet expectations for more personalised services.

Putting data to work for the customer

If insurers want to capture the hearts of Dutch consumers, they will need to put more effort into understanding the drivers and expectations of their current and future customers. Data will be key. It will help insurers refine their products and create new services; it will help them tailor services to highly-targeted customer segments; and it will help them apply more dynamic risk-based pricing (thereby reducing risk for both insurers and policy holders).

However, insurers are also increasingly recognising that – if they want to use in-depth data on their customers’ behaviours – they will need to deliver benefits to customers in return; perhaps better policy pricing, improved damage prevention or a healthier lifestyle. FBTO, for example, offers a ‘driving style insurance’ that offers discounts to customers with good driving habits when they sign up through the app.

From protection to prevention

Insurers are now using data insights to help them achieve a better understanding of the actual risks and behaviours associated with individual customers and policies. And this is helping them to set the right premiums and ensure the right products for every customer.

At the same time, however, a growing number of insurers are also using data and insights to help them shift from protection to prevention, allowing them to deliver even greater value to customers and to differentiate in the marketplace. For example, Univé’s Smart Safety Scan helps customers predict and prevent negative events which, in turn, allows the brand to offer much more competitive premiums and provide the customer with a more positive experience.

Our experience suggests that delivering on these opportunities and expectations will require insurers to become much more connected across the front, middle and back office. Insurers will need to be able to quickly convert their insights into actions that benefit their customers. And that will likely require a fundamentally different business model than what is currently used. More transformation will be required, particularly focused on improving the responsiveness of operations, modernising the enabling technology architecture and creating more seamless interactions.



US-based InsurTech Lemonade is often cited for their focus on integrating automation to simplify and improve customer processes. Their AI-driven claims processing application, for example, uses chatbots to interact with customers who submit claims simply by uploading photos of damaged goods. This not only helps improve the brand's capabilities in the Time and Effort pillar, it also creates a much more efficient claims process.

Towards the insurer of the future

It's not just operating models that are changing; the insurance sector also needs to find new ways of working. In part, these are being created by InsurTech start-ups and innovators who are creating new business models and processes. But if insurers want to keep up, they will also need to improve their own internal capabilities and business models.

Attracting new talent and new capabilities will be key. Insurers will need to focus on the entire employee journey, from recruiting and onboarding through to motivating and engaging.

That, in turn, will drive improvements in customer experience. Insurers will also need to carefully consider how they deliver strong change management support to the organisation and its employees in order to achieve better end-to-end alignment with the organisation's new digital, data-driven and customer-centric business models.

Customers are asking for change. Insurers will need to step up further if they hope to make sure their propositions remain 'fit for purpose'.

Hall of fame

Centraal Beheer

17

FBTO

41

Univé

60

VGZ

74

Zilveren Kruis

76

CZ

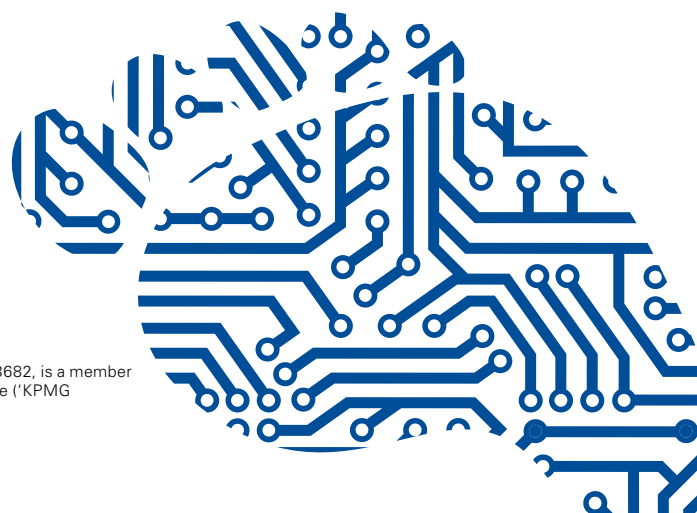
86

Interpolis

90

OHRA

95



Walk of fame: Centraal Beheer

With a deep desire to solve customers' issues and to contribute to the wider society, Centraal Beheer is changing what customers expect from traditional insurance organisations. Supported by a 'Happy Customers' team that is dedicated to driving customer centricity across the organisation, the brand is creating positive, solution-oriented and personal experiences. And that has earned them top rankings in the financial services sector this year.

Putting customers in the driver's seat

"From Day One – more than 110 years ago – Centraal Beheer has been all about customer centricity. For more than a century, we've been focused on creating a positive impact on our customers' lives. And I think our Happy Customers team embodies that commitment – this is a multi-disciplinary team with a single-minded focus on making customers (even more) happy.

It is important that our customers know we value them. We know that, in today's environment, you really need to value your customer as their expectations are no longer being set by the sector, but rather by the overall cross-sector leaders. Our customers expect the same level of customer experience from their insurer as they do from their retailer or telco. We need to make sure we can meet those expectations.

Yet simply meeting our customers' heightened expectation is not enough for us. We strive to go that extra mile by surprising and rewarding our customers at key points along the customer journey. Our customer agents are empowered to send our customers small surprises when appropriate – maybe a small bib when a new child is born; in other cases we might send Myosotis seeds (commonly known as forget-me-nots) when a customer cancels their policy.

Our goal is to recognise certain occasions – to create memorable moments and put a smile on our customers' faces. The response from our customers is often just as surprising: we have received gift cards and thank you notes; customers have driven to our offices just to say thank you in person.

We also like to create surprises on a larger scale. For example, during our "little dents day" event, we invite customers to come out and get up to three dents repaired for free. We create a carnival-like atmosphere with coffee, sweets and live music to entertain our customers while we fix up more than 3,000 cars. It is a great way to deliver on our customer experience and build customer relationships.

At Centraal Beheer, we try to encourage our employees to contribute to our customer experience and to come up with new ideas. Every month, we recognise an employee who has gone the extra mile to either directly or indirectly impact the customer.



One recent honouree, for example, was a call centre agent who helped a customer salvage their travel plans at the last minute by driving key documents right to their home.

Our employees are motivated by our customer values: positive, solution-oriented and personal. At Centraal Beheer, our customers always come first; their needs always take priority. That is something unique to our culture and it is highly motivating to employees.

Really getting to know the customer

We never make changes to the customer experience based solely on gut-feel or assumptions; all of our decisions need to be customer-centric and data-driven. We use our customer data and insights to critically evaluate and prioritise those improvements that will make a real difference to our customers.

When our data uncovered that our customers were not properly re-evaluating their policies on a regular basis, we created a chat-bot that worked with customers to determine whether their insurance was still the best fit for their personal needs. While our preference is to have a human agent speak with all of our customers, the chat-bot was warmly received by customers and allowed us to further increase customer engagement.

Given the value of customer insights, we are continuously looking for new opportunities to improve our understanding of our customers. We have invested significantly into achieving a 360-degree view of our customers. We use text mining to capture key insights from qualitative customer feedback. We have mapped our entire customer journey and now monitor key interactions using Voice of the Customer feedback as well as measures such as NPS and Loyalty.

And that allows us to detect pain points, solve issues, track improvements and – most of all – improve service personalisation.

We also go directly to our customers to capture their ideas and insights. Our Customer Arena event, for example, brings together groups of customers to share their experiences on specific topics. The event not only provides us with valuable customer feedback but also provides employees across the organisation with a shared understanding of our customers' needs.

Our focus is on sharing our customer insights across the organisation and encouraging our employees to use them. Our view is that every single employee needs to understand the needs of the customer if we hope to create even happier customers.

Delivering valuable solutions

At Centraal Beheer, we don't just sell insurance policies, we offer our customers solutions. And that is how we see our role in society: we identify important issues and work to solve them.

For example, our 'handyman' solution helps both customers and non-customers find a reliable and suitable handyman when they need it (more than 20,000 people have used it since we launched it last year). Our 'RoadGuard' solution provides drivers in The Netherlands with an on-demand, pay-per-use roadside assistance service, complete with an Uber-like interface that allows users to track the location of their support vehicle.

As we look into the future, our focus continues to be on our customers. Indeed our long-term goal is to support all of The Netherlands.

New technologies and ideas will be key; ease-of-use and a 'one-click/one-swipe' experience will be the base expectation. We also know it is pointless to focus on the present without creating alignment to the future long-term strategic plan.

Our vision of the future encourages our Happy Customers team and our employees. It drives our customer focus and our brand. We see the future as our inspiration. And we understand that the future starts today."

Albert Spijkman

Division Chairman Centraal Beheer
(divisievoorzitter Centraal Beheer)

Yvette Stegeman

Manager Happy Customers
(manager Blijve Klanten)

Scores vs. market average



Personalisation

+5%



Integrity

+4%



Expectations

+4%



Resolution

+6%



Time and Effort

+7%



Empathy

+7%



Sector highlight: Logistics



Delivering experience

When was the last time you purchased stamps at a Post Office? Or took a package to a return point and waited for the proof of shipment receipt? Chances are, it was a long time ago. Today, consumers are able to write a nine-digit code onto their envelope to ensure it reaches its destination. Packages can be picked up right at the customer's door. As the environment and expectations around logistics rapidly shifts, our research suggests logistics providers in The Netherlands are struggling to impress. The big question is whether this trend can be reversed.

The logistics sector has been under tremendous pressure over the past few years. Stuck between rising expectations, narrowing margins and increasing competitive pressures, the logistics sector has been struggling to connect with customers.

Indeed, in our research, the sector suffered an overall drop in Customer Experience Excellence scores – from 6.85 in 2018 to 6.69 this year. None of the brands in our ranking improved their score over last year. As a sector, logistics ranks ninth overall (only slightly ahead of the public sector in last place).

While consumers seem to consider logistics providers to be trustworthy (the sector scored highest on the Integrity pillar), the reality is that their base level expectations have shifted. It's no longer good enough to just deliver the package on time and undamaged; this has become the status quo.

And while there are many possibilities for things to go wrong, it also creates massive opportunities for those able to deliver an experience alongside their service.

More than a delivery

When social media started being adopted, many worried it would be the final nail in the coffin of traditional mail services. But the simultaneous rise of ecommerce filled the void with packages. Now, the dynamics of the logistics sector are changing, and continue to change.

On the one hand, customer expectations are increasing – options like same-day delivery, preferred timeslot delivery and track & trace options are resetting customer expectations across the sector.



“The possibility at PostNL to write a nine-digit code as a stamp is a great solution if you don’t have a printer or a post office nearby.”

Respondent CEE, 2019

At the same time, the rise of digitisation and adoption of Internet of Things (IoT) is also providing logistics organisations with new sources and use of data to improve operational performance and enhance the customer experience.

The sector is also continuing to explore new delivery innovations and models. Pick up points are popping up not only in stores but also in offices and transit stations. Others are experimenting with drones for small commercial deliveries. In the Netherlands, Albert Heijn is testing a bright blue delivery robot to deliver orders at Eindhoven Campus; DHL and PostNL are running a pilot where deliveries are securely delivered and stored in the customer’s car trunk.

Digital upstarts may pose little threat to the bigger players at this time (logistics remains a capital-intensive and asset-heavy business). Instead, the threat is coming from companies that, at one time, would have been considered customers.

Retailers like Picnic and Coolblue for example, are taking logistics in-house; they see delivery as an important customer touchpoint and an opportunity to delight. Picnic uses technology to put the customer in control of their delivery by showing them in real-time when their groceries will arrive.

Coolblue uses unique cardboard boxes that are designed to be fun on their own for customers (creating ‘PakketPlezier’ or ‘PackagePleasure’). In doing so, these brands are demonstrating that there is significant opportunity to delight customers with logistics.

Go the extra mile

With a strong track record for achieving operational excellence and extensive national and international networks, logistics brands should be well positioned to create value for customers.

Some of the more innovative logistics brands are now looking at how they can provide additional customer services by leveraging their network and personal customer interactions.

PostNL, for example, already offers customers a furniture-assembly service and a set-up service for laundry machines for example. In the future, this could become a significant source of new revenue and improved customer experience for logistics brands.

Furthermore, customer demands for more sustainable products and supply chains could also create new opportunities for logistics brands to delight customers.

There is a massive opportunity to rethink the traditional delivery and return process; logistics companies could be helping shape that future in a way that reduces their impact on the environment and keeps customers at the centre.

While logistics brands in The Netherlands are clearly struggling to impress Dutch consumers, we see strong signs and signals of future hope. Logistics brands are starting to recognise the vital role they play in the customer experience and are now shifting their focus towards delighting customers.

“PostNL delivers its packages on time and the deliverer is friendly and polite.”

Respondent CEE, 2019

Research methodology

Global Customer Experience Excellence Research

The brands included in this research are based on guidelines from *Customer Experience Excellence Centre*, conducting Customer Experience Excellence (CEE) research annually since 2010. Over that time, more than 275,000 consumers have been interviewed and 2,700 brands measured to collect more than 3 million individual evaluations. Since two years the research expanded around the globe, and continued this year by taking in the views of more than 84,000 consumers across 20 markets¹.

The research for this NL Customer Experience Excellence report was conducted via an online survey methodology, completed Q2 2019. A nationally representative consumer sample was targeted, to be representative in terms of age and gender, whilst also targeting regional representation. The sample consisted of 5,052 consumers.

To participate in the research and to be able to respond to questions on a specific brand, respondents must have interacted with that company in the last six months. An interaction is defined as making a purchase, using the company's products and services, contacting a company with a query, or even browsing their website or store – so not all respondents will have been existing customers of the brand they evaluated. In order to be included in the final rankings each brand must have achieved a minimum of 100 consumer responses.

Dutch Customer Experience Excellence coverage in 2019:



5,052
Customers



48,170
brand evaluations



214
cross sector brands

Methodology and terminology:

Sector coverage

For this report we analysed brands across 10 sectors. A total of 214 brands, operating in the Dutch market, were included in this research.



Financial services



Grocery retail



Non-grocery retail



Restaurants and fast food



Entertainment and leisure



Travel and hotels



Logistics



Utilities



Telecoms



Public sector

Key metrics

The Six Pillars A decade of research and more than 3 million consumer evaluations have identified and validated six fundamental components of every great customer experience – The Six Pillars - a framework for customer experience best practice which are measured within the survey.

Advocacy In order to understand the respondent's likelihood to recommend we ask them to rate how likely they would be to recommend each company to a friend or colleague.

Loyalty To understand likelihood to repurchase we ask respondents to rate how likely they are to continue buying goods /services from each company in the future.

Critical incident

technique questioning An open question is included to explore more about a respondent's experience with a particular brand. Example responses cover details of a specific experience, what happened and how it made them feel about the company.

Customer Experience

Excellence (CEE) scores The CEE score is derived for each brand via a weighted average of the brand's score for each of The Six Pillars. The weighting is calculated through regression analysis to understand the relative importance of each pillar in driving the two commercial outcomes measured in the analysis: advocacy and loyalty.

¹KPMG Customer Experience Excellence Centre, 2019

Methodology developed by the Customer Experience Excellence Centre.

Further resources

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Customer Centre of Excellence

Marketing & Communication department (NL)





















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Jagdeep Shambi



www.kpmg.nl

2019 NL Top 100 Customer Experience Excellence champions

	1	Van der Valk Hotels	
	2	bol.com	
	3	Lush	
	4	Rituals	
	5	Coolblue	
	6	Pearle Opticiens	
	7	Specsavers	
	8	Eye Wish Opticiens	
	9	ANWB	
	10	KLM	

Sector key



Non-grocery retail



Grocery retail



Restaurants and fast food



Logistics



Financial services



Telecoms



Public sector



Travel and hotels



Entertainment and leisure



Utilities

Change vs 2018



Up























































































































































































Down



Non-mover



New to Analysis

	11	Landal			42	Holland & Barrett			72	Vodafone	
	12	Apple Store			43	Douglas			73	Starbucks	
	13	Greetz			44	Corendon			74	VGZ	
	14	TUI			45	Bruna			75	Ticketmaster	
	15	Hornbach			46	Ekoplaza			76	Zilveren Kruis	
	16	IKEA			47	Gamma			77	Vero Moda	
	17	Centraal Beheer			48	Lidl			78	Praxis	
	18	Zalando			49	BCC			79	BP	
	19	Expert			50	C&A			80	YouTube	
	20	Hans Anders			51	de Bijenkorf			81	Nelson	
	21	DA			52	Kruidvat			82	Domino's Pizza	
	22	Albert Heijn			53	Jan Linders			83	Vapiano	
	23	wehkamp			54	Gall & Gall			84	DekaMarkt	
	24	Ben			55	Etos			85	Greenchoice	
	25	Utopolis (Kinopolis)			56	HEMA			86	CZ	
	26	Picnic			57	PLUS			87	ING	
	27	Hallmark			58	Jumbo			88	Schiphol Amsterdam Airport	
	28	ASN Bank			59	Subway			89	Esprit	
	29	Prénatal			60	Univé			90	Interpolis	
	30	Vue Cinemas			61	Simpel			91	Vomar	
	31	Hunkemöller			62	T-Mobile			92	Action	
	32	Transavia			63	Center Parcs			93	Amazon	
	33	ICI PARIS XL			64	Hollands Nieuwe			94	Videoland	
	34	Dirk van den Broek			65	OMODA			95	OHRA	
	35	KPN			66	SNS			96	Foot Locker	
	36	Booking.com			67	La Place			97	Expedia	
	37	Pathé			68	Karwei			98	ABN Amro	
	38	Netflix			69	Samsung Store			99	Esso	
	39	PayPal			70	Thuisbezorgd.nl			100	Blokker	
	40	Sunweb			71	Rabobank					
	41	FBTO									

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