



# Kantar CX Pulse

How Meaningfully Different Experiences  
help your brand grow

# WELCOME TO KANTAR CX PULSE

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Welcome to Kantar CX Pulse, our first edition of Kantar's Dutch ranking of the most successful brands in CX, based on consumer research

Why do some brands grow year after year, while others fade away? The answer lies not in advertising budgets, but in how brands embed themselves in customers' lives. Strong brands are both meaningful and distinctive - they connect with customers' needs and emotions and stand out from the crowd. It is precisely the experiences that customers have with a brand that largely determine how a brand is perceived.

## What you'll find in this booklet

Section 1: What makes a customer experience excellent  
a view into Kantar's Meaningfully Different Experience Framework

Section 2: Results from our Kantar CX Pulse 2025 survey  
showcasing across 6 sectors best in-class customer experience



# MEANINGFULLY DIFFERENT EXPERIENCES (MDX) TURN EVERYDAY INTERACTIONS INTO LASTING MEMORIES

**Meaningfully Different Experiences (MDX)** turn everyday interactions into lasting memories that grow preference, loyalty, and value. They happen when experiences meet people's needs and create an emotional connection (Meaningful), clearly stand out as something only your brand could deliver (Different), and come readily to mind at the next decision (Salient).

Across categories, growth-driving experiences blend superior functional delivery with an emotive payoff that aligns to a distinctive brand identity—so the experience could only be yours.

We translate this into six practical drivers teams can design and measure: **Effectiveness, Ease,** and **Affinity** build meaningfulness; **Authenticity, Uniqueness,** and **Inspiration** create difference.

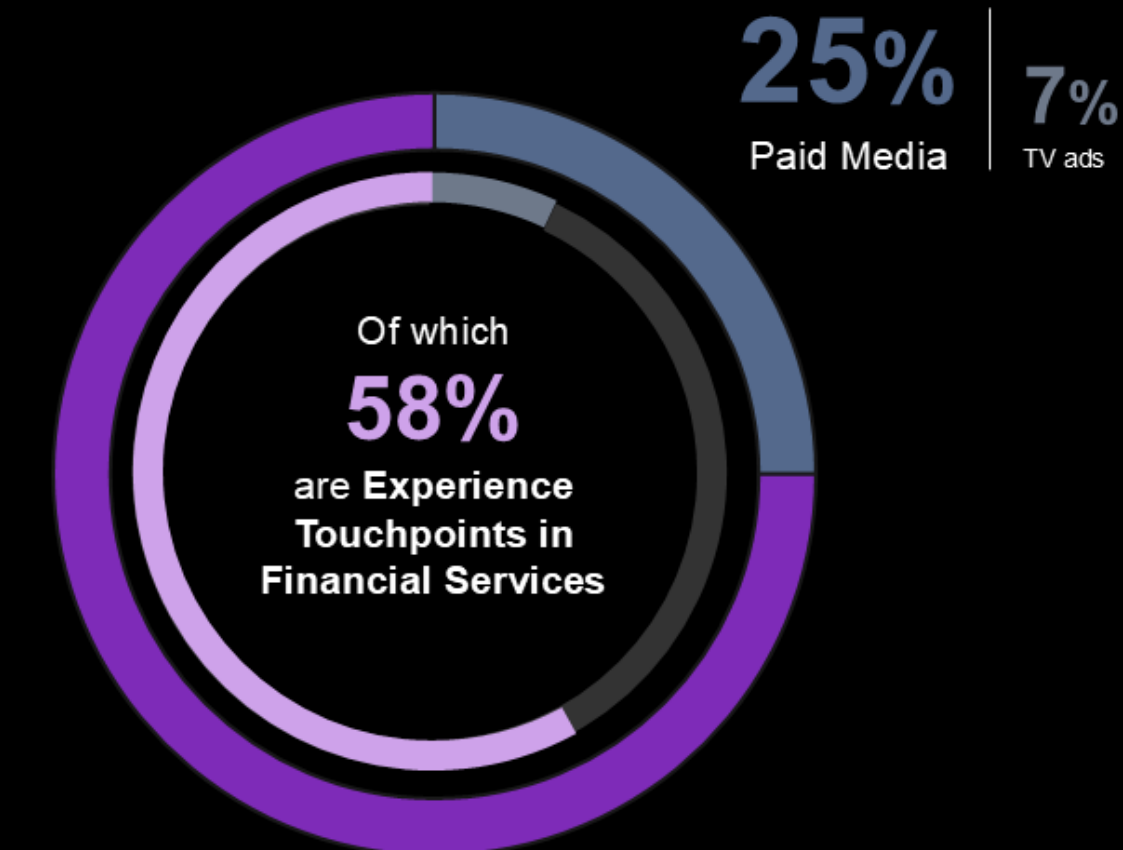
Using this lens, CX stops being hygiene and becomes a growth system: benchmark performance versus competitors, focus investment on moments that most strengthen memory and predisposition, and craft signature experiences customers can't get elsewhere.

Our data shows that 75% of brand perception is shaped by real-life experiences: how easy a service works, how reliable a product feels, and how a brand shows up in-store or online. It is precisely there, in daily interaction, that brand value is built or lost.

## What builds a brand? Everything

Other touchpoints, like **product or service experiences** and **word of mouth**, can contribute up to

**75%**



# WHY OFFERING MEANINGFUL AND UNIQUE EXPERIENCES MAKE THE DIFFERENCE FOR BRAND GROWTH

Why does one brand grow year after year, while another slowly loses its relevance? The answer often doesn't lie in advertising budgets or visibility, but in how brands manage to secure a place in their customers' lives.

Strong brands are meaningful and distinctive. They respond to consumer needs and emotions while standing out from the crowd. It's the experiences customers have with a brand that largely determine whether it's seen that way. Campaigns and media efforts are only part of the story. Research shows that about three-quarters of brand perception is shaped by everything customers experience in practice: how easy a service is to use, how reliable a product feels, how a brand presents itself in-store or online. It's precisely in these daily interactions that brand value is built—or lost.

## Experience as a Growth Accelerator

Analysis of more than 10,000 brands worldwide shows that organizations that improve customer experiences are 2.5 times more likely to gain market share within two years.

This makes it clear that investing in experience isn't just about short-term customer satisfaction, but also about sustainable growth and competitive strength. A key element here is emotive clarity: the extent to which a brand convincingly and consistently shows what it stands for and translates that into the customer experience.

## *Tony's Chocolonely: Disruptor with a Mission*

Tony's Chocolonely demonstrates how a brand can be meaningful and distinctive by breaking the status quo of an entire category. Where chocolate used to revolve around classic packaging and flavor variants, Tony's introduced a radically different premise from day one: a mission to make 100% slave-free chocolate the norm.

That mission is made visible everywhere. The unevenly divided pieces in the bar symbolize inequality in the cocoa industry. The bright, unconventional packaging breaks the image of the traditional chocolate bar and grabs attention on the shelf. And the wrapper tells the story of the mission, making the packaging both a communication tool and an educational medium.

In both activations and collaborations, Tony's consistently chooses a bold and transparent approach. The brand has shaken up the category and proven that meaningful choices, combined with distinctive experiences, create loyal customers. Tony's is a textbook example of how a brand can be both meaningful and different, supported by clear emotive clarity.

## **V&D: How Losing Meaningful Difference Can Be Fatal**

The contrast with V&D is stark. For years, it was the department store of the Netherlands, with La Place as a familiar end to a day of shopping. The brand stood for completeness and a sense of ritual.

Over time, that distinctive character faded. Stores felt less inspiring, the assortment became increasingly generic, and customers no longer understood what V&D stood for. As a result, the emotive clarity that was once so strong disappeared.

What remained was a brand no longer perceived as meaningful or distinctive. In 2016, V&D disappeared from the streets for good. It shows that even iconic names lose relevance when brand promise and experience no longer align.

## **The Challenge for Brands**

The challenge for many organizations isn't gathering even more metrics but connecting brand and customer experiences. A high

NPS score on a single touchpoint means little if the overall experience doesn't add up. It's about the sum of moments that together form a brand that is reliable, distinctive, and memorable.

## **What Does This Mean for Marketers?**

- Connect brand values to customer experiences at key moments.
- Measure the total experience, not just isolated touchpoints.
- Design for emotive clarity: ensure every brand interaction reinforces the story.



2.5x

“Brands who improve their experience are far more likely to significantly increase their market share”

# KANTAR CX PULSE 2025

## EVALUATING BEST IN CLASS CUSTOMER EXPERIENCE ACROSS 6 CATEGORIES

### Categories in the survey



The Kantar CX Pulse 2025 study was initiated to uncover how customer experience (CX) drives brand growth in the Dutch market.

In a landscape of lookalike products and services, it's the quality of experience—how brands deliver, connect, and emotionally engage—that sets them apart.

The study aimed to benchmark leading Dutch brands across six key high penetration categories: Banking, Telecom, Utilities, Supermarkets, Insurance and Travel.

The study involves a large-scale consumer survey across 81 brands among a total sample of n=12.150 respondents. Assessing Experience Strength and Experience Power the study reveals which brands turn expectations into loyalty and long-term value



# What are Meaningfully Different Experiences?



## Meaningful

Meet functional and emotional needs

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### Effective

Deliver on needs, do what you promise

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### Easy

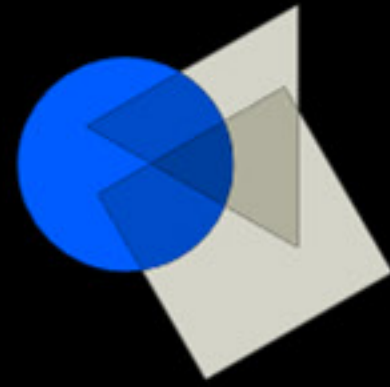
Effortless and enjoyable experiences

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### Affinity

Build connection and trust with empathy

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## Different

Redefining category expectations

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### Authentic

True to the expectations of your brand

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### Unique

An offer customers can't get elsewhere

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### Inspiring

Magical moments that create memories

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# PICNIC LEADS THE DUTCH SUPERMARKET CATEGORY BY A RELENTLESS FOCUS ON CUSTOMERS NEEDS

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Supermarkets in the Netherlands are facing pressure. Rising operational costs, tough negotiations with A-brand suppliers, and stricter sustainability regulations are squeezing margins. At the same time, consumers are demanding more: they expect low prices, full shelves, seamless digital experiences, and sustainable, healthy products. The rapid growth of online shopping and the shift toward private labels further intensify competition, making it harder for supermarkets to differentiate themselves and maintain customer trust.

The CX Pulse study reveals that customer experience is a decisive factor in building brand value. While some supermarkets perform well on the basics - offering high-quality products, meeting expectations, and communicating clearly - these strengths are no longer always enough. Consumers want more than efficiency; they seek brands that understand their needs and deliver experiences that feel both personal and unique. The sector's main challenge is to move beyond functional delivery and create emotional connections that foster true brand preference and advocacy.

Within this landscape, **Picnic stands out as the best-in-class supermarket.** Picnic's success is rooted in its relentless focus on customer needs. The brand's user-friendly app and reliable, free delivery windows make shopping effortless, while its ability to remember shopping habits and offer relevant rewards builds loyalty and trust. Unlike traditional supermarkets, Picnic's online-only model allows it to innovate continuously, offering unique sourcing strategies and consistently surprising customers. As a result, Picnic leads the sector by not just meeting but exceeding customer expectations and **setting a new standard for what a supermarket experience can be.**



# UNIVÉ DRIVES THE INSURANCE CATEGORY WITH THEIR FOCUS ON A PERSONAL APPROACH AND SPEEDY RESPONSE TIMES

The insurance sector stands at a pivotal moment. Customer expectations are evolving rapidly, and insurers must keep pace. Today's policyholders are not just looking for security—they demand speed, clarity, and genuine care. They expect seamless experiences across channels.

Impatience around claims handling is rising. Customers want answers fast. The days of waiting weeks are over; immediacy is the norm. This puts the sector under major tech pressure. Insurers must invest in digital tools and lean processes to deliver quick, effortless answers. Automation, AI triage, and proactive status updates can remove friction and reduce anxiety during claims. Ease of websites, apps, and platforms is baseline. The sector is shifting from reactive to proactive: from compensating damage to preventing damage.

Yet speed alone isn't enough. CX Pulse shows clear, understandable communication is a top driver of satisfaction. Customers value insurers who keep things simple and transparent, making tasks easy and processes straightforward. Tone and timing matter as much as content, especially at stressful moments. High quality products matter, but must pair with honest, open interactions that build trust.

Personalization is another way to stand out. Customers want to be recognized, not treated as a policy number. Acknowledging loyalty and tailoring experiences can turn transactions into lasting partnerships. Using data responsibly to anticipate needs shows care without feeling intrusive.

The path is clear: invest in tech for speed and simplicity, foster open communication, and put customers at the centre. Those who do will set new standards for customer experience in insurance.

Against this backdrop, **Univé is best in class**. They respond quickly and effortlessly to questions and claims—turning speed into reassurance. Their fast, straightforward service differentiates them, supported by products that consistently meet expectations. Crucially, Univé goes beyond efficiency: they treat customers as individuals and add a personal touch that builds trust and loyalty. By investing in technology and genuine, open interactions, Univé delivers an experience that satisfies and delights.



# TUI: SETTING THE STANDARD FOR CUSTOMER EXPERIENCE IN TRAVEL

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The travel industry is undergoing a remarkable transformation, social media and AI impact how consumers search for the perfect destination resulting in heightened expectations, redefining what it means to journey across the globe

Travel is no longer just about destinations—it's about transformation. Families chase quality time across continents, while Gen Z and millennials book "set-jetting" trips inspired by streaming hits. AI curates personalized itineraries, and social media turns wanderlust into one-click bookings. Sustainability drives choices; travellers seek authentic, community-rooted experiences. Fintech reshapes payments, making travel more seamless. Amid rising costs, wanderers prioritize memories over material goods. The journey matters as much as the destination—luxury rail, immersive cruises, and local markets redefine the path forward. Travel isn't just back—it's reimagined

The latest CX Pulse research reveals that while the sector delivers memorable moments, there is a clear gap between functional delivery and emotional connection compared to other industries. What sets leading travel brands apart is their ability to make the customer journey effortless and enjoyable—from intuitive digital tools to clear,

personal communication. Brands are redefining what it means to be a travel partner, not just a provider. By focusing on ease, reliability, and those small, thoughtful touches—like a personal welcome home—they turn trips into lasting memories.

Yet, the research also signals where the sector can grow. Customers crave experiences that feel unique and tailored, not just efficient. The brands that truly stand out are those that understand individual needs, surprise with unexpected delights, and build trust through openness and authenticity.

For travel organisations, the challenge is clear: move beyond the basics, invest in emotional resonance, and consistently deliver on the promise of meaningful difference. In doing so, the sector can transform every journey into a story worth sharing.

**TUI stands out as a leader in customer experience** within the travel sector, as highlighted by the latest CX Pulse research. Unlike competitors who focus merely on functional service, TUI consistently exceeds expectations by making travel both easy and memorable. The company's success stems from its customer-first approach, offering intuitive digital planning tools, personalised touches, and always-accessible support. Customers appreciate TUI's clear communication and the sense of being individually recognised, which fosters lasting loyalty. By seamlessly blending efficiency with emotional engagement, TUI raises industry standards and demonstrates that genuine customer care drives lasting advocacy



# PUTTING THE CUSTOMER FIRST: REDEFINING EXPERIENCE IN THE EVOLVING ENERGY SECTOR

The energy sector is experiencing significant change, with customer expectations for transparency, personalisation, and emotional connection reshaping how providers must deliver value and build trust.

Dutch consumers want more control over their energy. Price increases evoke emotions ranging from anger to fear. Sustainable sources become more important. Transparency and proactive communication are becoming crucial. Customers look for offers, reconsider contracts and want personal contact. Trust grows through clarity, freedom of choice and empathy. Suppliers face the challenge of not only supplying energy, but also peace of mind, certainty and relevance. In a market full of uncertainty, customer focus is the new compass. Those who listen win.

The energy sector is undergoing a profound transformation. As sustainability, digitalisation, and customer

empowerment reshape the landscape, energy providers are challenged to deliver more than just reliable service - they must create experiences that truly resonate.

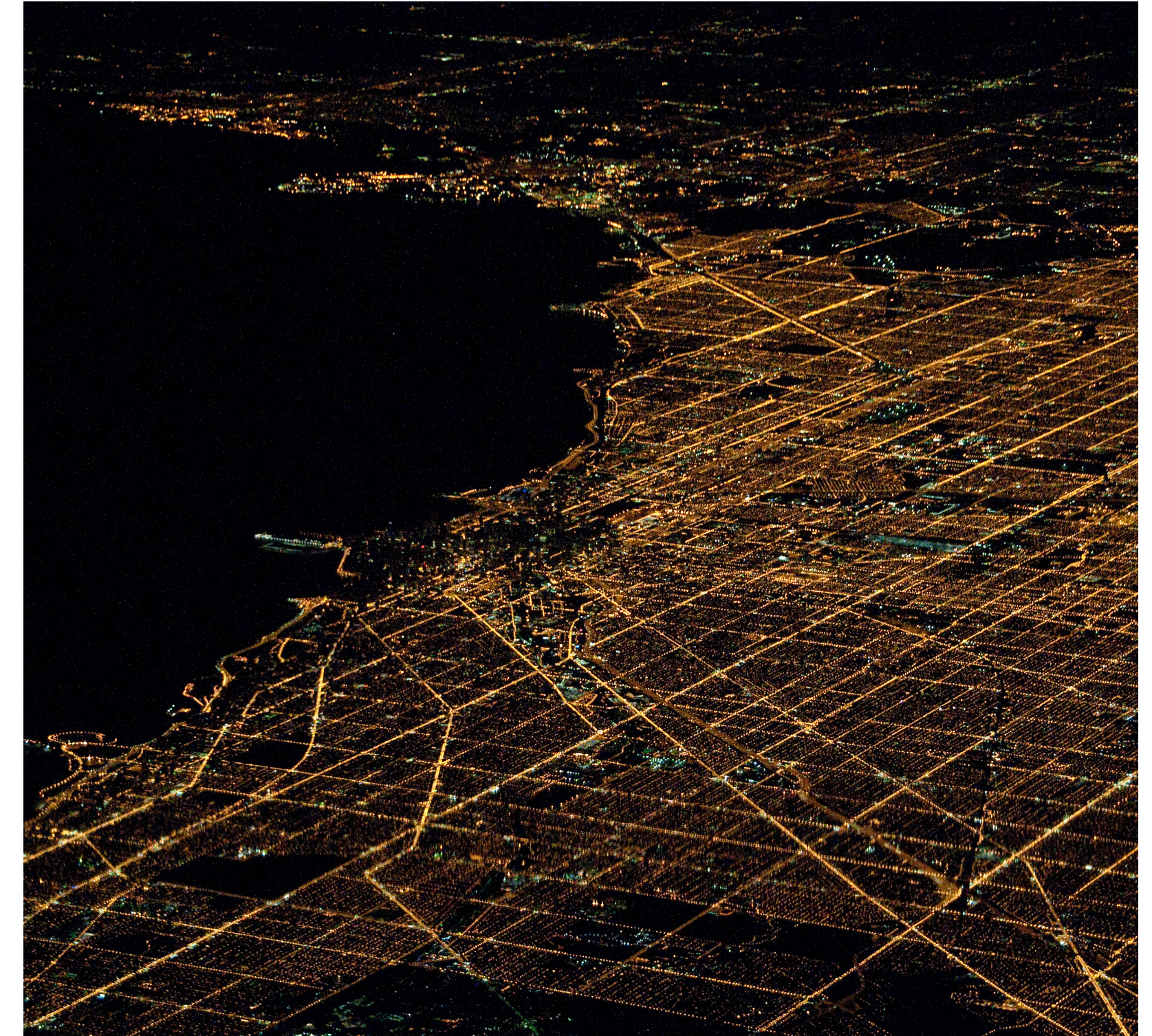
CX Pulse research reveals that energy brands are making strides in delivering quality products and keeping things simple for customers. Many providers excel at making daily tasks easy and ensuring their services meet expectations. Clear communication and straightforward processes are becoming the norm, helping customers feel confident in their choices.

Yet, the sector faces a pivotal moment. Customers increasingly seek openness, honesty, and a sense of being genuinely understood. The research highlights that while functional delivery is strong, emotional connection often lags. Customers want to feel recognised as individuals, not just account numbers, and are looking for brands that surprise and delight them with thoughtful touches.

The opportunity for energy providers is clear: invest in building trust, foster authentic relationships, and create experiences that feel different from the rest. Brands that succeed will be those that go beyond efficiency—embracing transparency, personalisation, and a human touch at every interaction.

As the sector evolves, the winners will be those who turn everyday energy moments into meaningful, memorable experiences. The future belongs to energy brands that dare to be open, empathetic, and truly customer centric.

In the energy sector, **Greenchoice stand out as champion of customer experience** and impresses with its commitment to quality, transparency, and making everyday tasks effortless. The brand is celebrated for treating customers as people, not numbers, and for consistently exceeding expectations.



# ASN: SETTING THE STANDARD FOR CUSTOMER CENTRIC BANKING EXCELLENCE

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The Dutch banking sector is rapidly transforming, driven by digital innovation and rising expectations for personalisation and transparency. Competition from both established banks and digital challengers is fierce. Success will come to those who combine technological advancement with authentic human connection.

The Dutch banking sector is changing rapidly. Neobanks such as Bunq, Revolut and Knab are growing explosively thanks to digital convenience, low costs and sustainability. Customers are switching for higher savings rates, transparency and social impact. Nevertheless, ING, Rabobank and ABN AMRO remain dominant. Consumers expect personal service, digital innovation and social responsibility. Banks are investing in AI, sustainability and inclusivity to remain relevant. The battle for trust and relevance has begun—those who listen, innovate and connect will win the future.

The banking sector is in the midst of a transformation, where customer experience is no longer a “nice to have” but a core differentiator. The latest CX Pulse research shows that banks are making significant progress in delivering high-quality products and services, with many excelling at making daily banking tasks easy and ensuring their offerings meet customer expectations.

Customers appreciate clear and understandable communication, as well as digital tools that make managing finances seamless. These strengths have helped banks build a foundation of trust and reliability. However, the research also highlights areas where the sector can raise the bar. Customers increasingly expect transparency, genuine understanding, and a sense of being treated as individuals rather than account numbers.

The opportunity for banks lies in moving beyond efficiency and functionality. The brands that will lead are those that invest

in truly understanding their customers’ needs, are open and honest in their interactions, and create experiences that feel unique and personal.

As digitalization accelerates and new entrants challenge the status quo, the winners in banking will be those who blend technological innovation with a human touch. The future of banking belongs to brands that make every interaction meaningful, building not just accounts, but lasting relationships.

In a crowded banking landscape, **ASN stands out as the brand that truly puts customers first.** Clients praise ASN for its seamless digital tools, clear communication, and genuine understanding of individual needs. Loyal customers feel recognised and valued, while newcomers quickly sense the difference. ASN’s commitment to quality and openness sets a new benchmark, turning routine transactions into moments of trust.



# TELECOM IN THE NETHERLANDS: WHERE INNOVATION MEETS HUMAN CONNECTION – VALUE BRANDS WIN IN THE TELCO SECTOR WITH SIMPLICITY AND TRANSPARENCY

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The Dutch telecom landscape is rapidly evolving toward greater freedom, simplicity, and personalized experiences, as both technology and customer expectations redefine the industry.

The telecom sector is at the heart of our connected lives, and customer expectations have never been higher. It is all about freedom and simplicity. Consumers want flexible bundles, clear terms and conditions, and the ability to switch providers instantly. Fiber optics are becoming the new standard and trust hinges on transparency and customer care. But, despite near-complete fiber coverage, many homes have not yet converted to fiber, often due to complexity or unclear benefits. Today's consumers choose not just based on speed, but also on convenience and relevance. Providers who listen, personalise, and make things simple will stand out, blending technology with a human touch for better experiences.

The latest CX Pulse research shows that telecom brands are making notable progress in delivering high-quality products and services, with many excelling at making daily interactions easy and intuitive. Customers appreciate the user-friendliness of digital tools, clear communication, and the reliability that underpins their everyday connectivity.

Yet, the research also highlights a crucial challenge: while functional delivery is strong, emotional connection often lags. Customers increasingly want to feel understood and valued as individuals, not just as subscribers. They seek brands that are open, honest, and proactive in addressing their needs, especially when things go wrong.

The opportunity for telecom providers lies in moving beyond efficiency and reliability. The sector's leaders are those who invest in building genuine relationships, surprise customers with thoughtful touches, and create experiences that feel different from the rest. Recognising loyalty, offering transparent processes, and making every interaction personal can turn routine service into memorable moments.

As digitalisation accelerates and competition intensifies, the winners in telecom will be those who blend technological innovation with a human touch. The future belongs to brands that make every connection meaningful, delivering not just service, but experiences that inspire trust and loyalty.

Simpel and Simyo shine as champions of customer experience. Simpel for its easy-to-use digital tools, clear communication, and genuine understanding of individual needs. Simyo stands out for its commitment to quality, transparency, and making daily tasks effortless. KPN stands out as both meaningful and different because customers perceive dependable quality and clear, transparent processes, building trust and relevance. Its execution on essentials—network reliability, simple journeys and open communication—creates a distinctive, no nonsense feel.



# SIX KEY TAKEAWAYS FROM WINNING BRANDS

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## 1. Personalization and customer centricity drive supermarket success

**Picnic** leads the Dutch supermarket sector by relentlessly focusing on customer needs. Its user-friendly app, reliable free delivery, and personalized rewards set a new standard for supermarket experiences, moving beyond functional delivery to create emotional connections and true brand advocacy.

## 2. Speed, simplicity, and personal touch define insurance excellence

**Univé** stands out in insurance by responding quickly and effortlessly to customer queries and claims. Their fast, straightforward service, combined with genuine personal attention, builds trust and loyalty, showing that efficiency must be paired with honest, open interactions.

## 3. Emotional engagement elevates travel experiences

**TUI** sets the benchmark in travel by blending efficiency with emotional engagement. Their intuitive digital tools, personalized touches, and clear communication make travel easy and memorable, fostering lasting loyalty and advocacy among customers.

## 4. Transparency and empathy are essential in energy

Leading energy brands like **Greenchoice** excel by delivering quality products and simple processes, but the sector's winners go further - investing in transparency, personalization, and authentic relationships to build trust and turn everyday energy moments into meaningful experiences.

## 5. Simplicity and reliability win in telecom (telco-only)

Value brands such as **Simpel** and **Simyo** thrive by keeping offers straightforward, communication clear, and digital tools intuitive. KPN pairs dependable quality with transparent processes that build trust and relevance. Executing the essentials—network reliability, simple journeys, and open communication—creates a distinctive, no nonsense feel that customers reward.

## 6. Trust, clarity, and a human touch define banking excellence

**ASN Bank** leads by combining seamless digital tools, clear communication, and genuine understanding of individual needs—turning routine transactions into moments of trust. Banks that pair functional excellence with transparency, recognition of loyalty, and personalized support build stronger relationships and long term advocacy.

# WANT TO KNOW MORE?

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## Discover the results for your brand

Individual brand results are available and include scores on **Experience Strength** and **Experience Power**, along with performance across the key experience drivers. These results provide a deeper understanding of how your brand is perceived and where strategic improvements can be made. If you're interested in exploring these insights further, we invite you to get in touch—we'll gladly guide you through the data and its implications for your business and have a more detailed sector report for Banking, Insurance, Supermarkets, Travel, Utilities and Telecommunications available.

## ExperienceEvaluator is now available

Missing your brand in the CX Pulse 2025 results? We now offer through Kantar Marketplace, a short, mobile-friendly ExperienceEvaluator survey that benchmarks your CX versus competitors and isolates the drivers that matter most.

Results are available in as few as four days, presented in an interactive dashboard so you can act immediately.

Grounded in Kantar's Meaningfully Different Experiences (MDX) framework, ExperienceEvaluator connects experience performance to brand outcomes, including Experience Power, Experience Strength and NPS, with driver and touchpoint analysis to highlight priority improvements.

Typical designs cover up to 12 brands with a 600-respondent sample, giving you clear, competitive context at an accessible price point.

Interested? Reach out to:



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