



Orchestrating the connected customer experience

Customer Experience
Excellence Report 2022



Foreword

In 2022 the Romanian market continues its growth journey in terms of CX maturity. Half of last year's top 30 brands are still present in this year's top 30. This shows the consistency and commitment of the local CX leaders, as well as the progress they are making, year on year.

An important insight is that this year's CX champions are emerging from the digital arena, with an impressive total of eight brands out of the Top 10 playing in the online and app ecosystems. It is a clear sign of customers' shift towards digital channels and of the strong response of market players across sectors. Today, innovation and new digital customer value propositions are at the core of ensuring new sources of competitive advantage.

The quest for value remains a top priority for customers in 2022. This year's CX leaders have tailored their offerings and met their clients' expectations, showing that excellent customer service can co-exist with discounting models, in many instances enhancing the adoption of the relevant products and services.

With a rather turbulent and unpredictable period expected ahead, customer experience excellence will continue to remain a true differentiator for brands competing on the Romanian market. The challenge for the next CX champions, however, will be to deliver an enhanced, personalized and omni-channel experience at the lowest cost possible.

This will require getting closer than ever to their customers, while rethinking the way their organizations are designed to deliver customer value.

Victor Iancu

Associate Partner
Strategy & Experience Design
KPMG in Romania



2022's Main Trends as
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The Evolution of the Six
Pillars of CX

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The beginning of 2022 was marked by new challenges, as the war in Ukraine took the entire world by surprise. It did not lead just to a social crisis, but also contributed to the already existing crisis caused by Covid-19. Economic restrictions on Russia had a negative economic effect on Europe and energy prices reached all-time highs, leading to a rise in inflation.

The liberalisation of energy prices from Q2 2021 had already generated some price increases, while the lower quantities of fuel imported from Russia since the beginning of the war caused a real explosion of prices in all energy sectors (gasoline, electrical energy, gas).

These tensions have started to be felt on the Romanian market and customers

have become extremely cautious in spending their disposable income, while focusing on savings and long-term investments has become the norm.

This year's study reveals a general downward trend among all of the Six Pillars of Customer Experience Excellence - in a market which has historically grown year-on-year, this decrease could indicate that customers are now expecting brands to continuously invest and deliver improved experiences which are above last year's norms.

This marks a new level of maturity on the market and challenges brands to up their game and reposition their experience taking into account new customer expectations.

In terms of the Market KPIs (Loyalty, NPS and Value for Money), Value for Money registered the highest year-on-year decrease (-0.13). Given the economic context, customers are increasingly expecting to have the best experience, at a fair price and might become more demanding with respect to what brands are delivering.

This indicates that the financial aspect continues to play a significant role in customers' choices and this trend is expected to continue as the general insecurity in the economy is an additional reason for customers to be cautious with their investments.

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The Evolution of the Six Pillars of Customer Experience Excellence

2022 proved to be a challenging year from various perspectives: economic, social and political. These forces shaped the way in which consumers react and their reactions translated into a decrease in all of the Six Pillars at nation-wide level, as indicated by our 2022 research.



Integrity



Resolution



Expectations



Time & Effort



Personalisation



Empathy



Integrity

market score 8.16;
YoY decrease -0.05

This is the ability of a brand to be trustworthy and engender trust. It is a must have for companies from the customer's perspective as they entrust personal data to brands for various purposes, such as e-commerce, loyalty programs, personalized experiences and many more.



Resolution

market score 8.07;
YoY decrease -0.06

Resolution is not just about addressing problems as they occur, it is about having the ability to transform problem solving into a memorable experience for the customer.

Customers expect brands to take responsibility for mistakes and find appropriate solutions, preferably in a proactive manner, without the need for the inconvenience of going through customer support services.



Expectations

market score 8.02;
YoY decrease -0.04

There are two aspects to take into account when it comes to expectations. On the one hand, it is up to each brand to set expectations for its customers, and then meet and exceed them.

On the other hand, there are expectations that customers transfer from one brand to the other. Being exposed to a variety of experiences, customers seek and expect those experiences that made a difference in all interactions they have.

YoY
YoY: year on year

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Time & Effort

market score 8.39;
YoY decrease -0.02

In short, this involves minimizing customers' effort and creating frictionless processes. This is what this year's champions have placed their bets on. They invested in initiatives that reduced stress and anxiety associated with complex tasks by providing simplified solutions.

Customers are playing multiple roles in their daily lives. All are time consumers, and therefore, they want brands to consider their circumstances and act accordingly.¹



Personalisation

market score 8.23;
YoY decrease -0.04

This represents the ability of a brand to give individualized attention to drive an emotional connection. Brands can unlock the power of personalization if they put the data to use. Once brands understand their customers, personalization is just one step away.

Brands can differentiate from the rest if they manage to identify those micro-moments that actually matter to their customers. However, there is a balance. Not all age groups appreciate personalization to the same extent, and therefore, customer understanding is key.²



Empathy

market score 7.80;
YoY decrease -0.02

Understanding customers' circumstances to achieve a deep rapport. At a first glance, one may say that digital and empathy sound like oxymorons.

But they are not. In a digital world, empathy is expected to be a core competence when it comes to solution design. Interfaces and interactions should all account for customers' circumstances.

This can be a true differentiator and a building block for loyalty.

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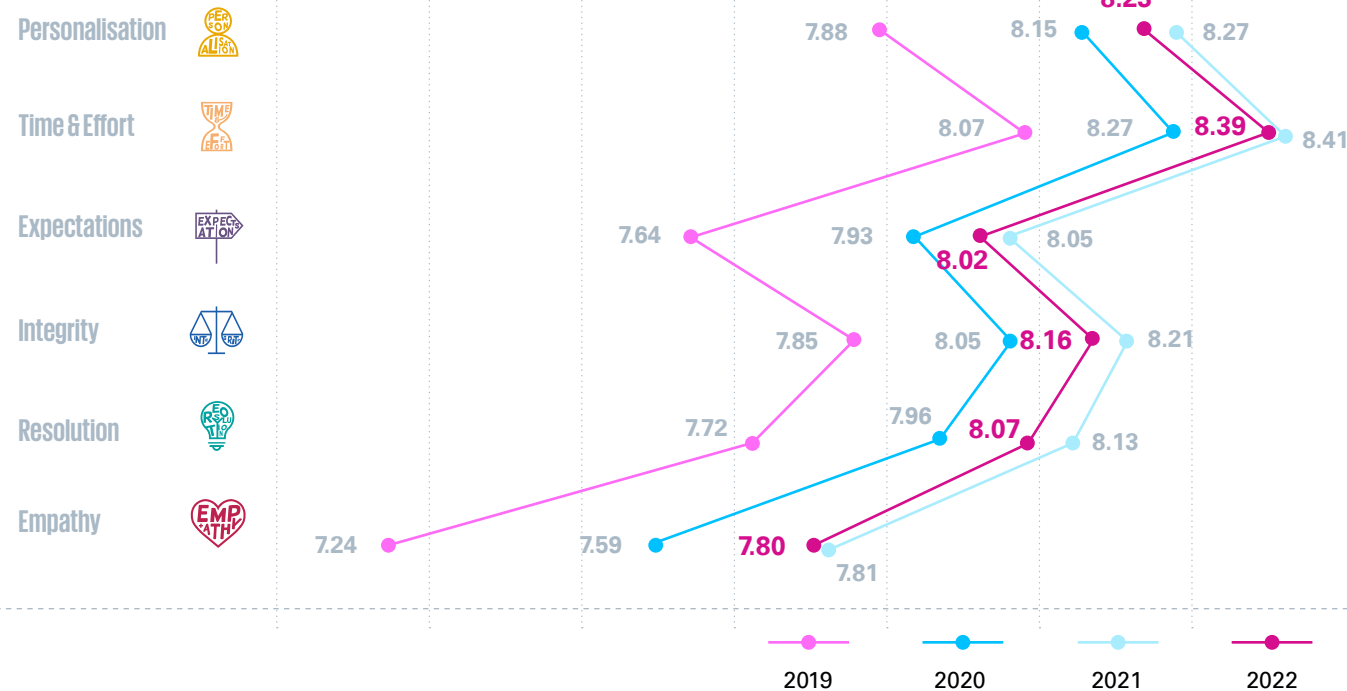
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^{1,2} <https://assets.kpmg/content/dam/kpmg/xx/pdf/2021/02/me-my-life-my-wallet.pdf>

The Evolution of the Romanian Market 2019-2022



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The Evolution of Market KPIs 2019-2022



The 2022 Hall of Fame

2022 Rank

Brand

1	Bringo
2	FarmaciaTei.ro
3	Cărturești
4	Notino (Aoro.ro)
5	H&M
6	Catena
7	PayPal
8	ING Bank
9	eMAG
10	Answear.ro

A common denominator for the brands belonging to the Hall of Fame is their digital edge. The top 10 is populated by brands with a strong digital presence.

Therefore, convenience could be one of the underlying themes for this year's CX leaders, as all are investing heavily in ensuring simplified journeys, in waiting time-reduction solutions and in providing a wider range of services and products.

As this year's results indicate, Time & Effort is the most important pillar in the top 10, with the highest score of 8.89 points (average based on the scores of the 10 brands).

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E-commerce is part of the Romanian customer's habits, especially since the Covid-19 pandemic turned online shopping into a new reality.

Additionally, customers are attracted to e-commerce given its wider offering as compared to bricks-and-mortar retail.

The rise of e-commerce has also been supported by the development of logistics and banking services.

This situation is illustrated by the top-ranked players in the sectors analyzed in this report: online retailers, marketplaces, electronic payment providers, and parcel delivery companies.

Four of the top performers (Carturesti, H&M, ING Bank, and eMAG) are not completely new to the top 10. Prior to the outbreak of Covid-19 they used to have leading positions.

ING Bank ranked #1 in 2020.

All four experienced significant falls in 2021, but now they have made their comeback.

There is also a new entrant in the leaderboard, Answear.ro.

This company has been introduced into the Customer Experience Excellence study this year, and has made its way up to the top as a result of its digital experience and its ability to deliver convenience.

According to this year's respondents the brand ensures fast delivery, a wide range of products and a perception of fair value for money.

Answear.ro is active in a sub-industry which has registered a significant increase in demand during the past two years, as a result of the restrictions and lockdowns.



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Bringo

CX score: 8.89

Bringo, the first Romanian e-grocery app, is also the first platform that connects consumers with a personal shopper. What makes it special in the minds of consumers is that Bringo is the only grocery shopping platform that provides an end-to-end client-oriented service: starting with a user-friendly interface, the duo of picker – personal shopper that helps you get the shopping done the same way you would do it in store, the control over your shopping list that gives you the confidence that you will get what you ordered and paid for and also high quality customer support, if you need it, after the order is closed.

All these efforts were highly appreciated by our customers, and during the pandemic more than ever these efforts were even more visible to them. Bringo was there when they needed it most and made tremendous efforts to accommodate all the orders that were growing exponentially. And it succeeded in doing it without lowering the quality of its service.

The now well-established post-pandemic reality has consolidated a more digital, remote, and overall more flexible space. In this context, Bringo came naturally to continue to support both old and new customers.

As a very inclusive brand, we have a broad target group of consumers, such as busy parents, young professionals, and enthusiasts for particular brands or experiences, as well as senior users for whom moving around and carrying big shopping bags can be challenging. Each business decision was made based on our consumers' expectations and demands.

In this respect, 2022 brought a refreshed app, offering a better browsing, buying & delivery experience for our customers. As a new feature, Bringo is the first platform to introduce payment by meal vouchers for e-grocery shopping, in addition to the already well-established payment methods: cash and credit card.

2022 was also a year of affiliations between Bringo and various partners, the objective being for the consumer to have more options in the app. Always attentive and empathetic to our customers' needs, Bringo has tackled people's concerns about missing deals if they don't go shopping by having the same prices and promotions in the app as in the physical stores and even providing exclusive online promotions for Bringo users.

Bringo has also eased the process of shopping together as a family, by introducing the shared shopping cart feature. The user sends an invitation link with just a click, and the other household member can just as easily add products. No shopping lists, memos, messages, or forgetting stuff.

These are just a few of the features that we brought this year to make the shopping experience, from beginning to end, as easy, user-friendly, and nice as possible. And we never stop, as our consumer needs are continuously changing and we want to keep raising the bar high and meeting their expectations.

Monica Arapalea

Head of Marketing, Bringo Romania

Bringo's 6 Pillars performance improvement from last year's results:

Personalisation		+1.61%
Time & Effort		+4.13%
Expectations		+1.92%
Integrity		+2.67%
Resolution		+3.81%
Empathy		+3.36%

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Answerwear.ro

CX score: 8.60



At Answerwear.ro we take pride in being customer-centric and focusing on meeting the needs and expectations of our customers.

As e-commerce has evolved in Romania, our customers' expectations are also rising as they expect better and better services. Therefore our strategic priorities have been improving our User Experience and providing our clients with the best brands and products portfolio. During the last 2 years we have worked on improving the UX of our website and mobile app and we have seen increases in conversion rates after these improvements.

We also added more than 200 brands to our portfolio and have increased the number of products available in our online shop to more than 200.000.

From our customer surveys, the next thing we need to work on are the delivery times and the variety of delivery options and payment methods and this is our next strategic focus.



Raluca Radu - Country Manager ANSWEAR.ro



I am satisfied with the items I bought from Answerwear. They deliver the orders very fast and I can choose from a wide variety of products.



Female, 41, Harghita

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Sector CX Score Change vs. 2021

Restaurant & Fast Food	8.30	-0.18
Non-Grocery Retail	8.26	0.00
Financial Services	8.24	0.05
Logistics	8.10	0.00
Grocery Retail	8.07	0.01
Telecoms	7.87	0.02
Travel & Hotels	7.77	-0.56
Utilities	7.53	-0.12



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Market Overview

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Restaurants & Fast Food



Sector Champion

5 to go

CX Score: 8.57

Highest CX Score increases from last year

Starbucks

CX Score: 8.33

+0.14 points increase vs. 2021

Highest YOY Pillar decrease

Resolution (-2.5%)

The Restaurant, Fast-Food & Food Delivery industry is the best performing industry on the Romanian market for the second year in a row.

Yet the industry has followed this year's general downward trend across all the 6 Pillars of Customer Experience Excellence. Out of the 6 Pillars, Resolution has marked a significant decrease.

Our research indicated that customers appreciate having mistakes sorted out promptly and their problems addressed in a professional manner.

Another important drop was recorded in the Value for Money indicator, which fell by 4.5% as compared to last year. Regardless of the return of "life before the pandemic", the new socio-economic context and the unprecedented high level of inflation have generated price increases for raw materials, higher utility costs, and job cuts.

This has forced brands to increase menu prices by up to 30%, which might have caused a shift in clients' perceptions in relation to value for money for the services they pay for.

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Last-mile delivery companies, in their attempt to capitalize on the economy's full reopening following the Covid-19 pandemic, invested in developing their businesses.

They shaped a new reality for today's consumers, with increased geographical coverage and convenience, translated into a diversity of products and a larger network of couriers, hence ensuring reduced delivery times.

The increased availability of deliveries for higher-quality brands may lead to fewer visits to physical restaurants.

The top 5 within this sector are a mix of food delivery platforms (Glovo and Bolt Food) and convenience restaurants. The presence of two cafe chains among the top 5 brands could be indicative of the fact that Romanian customers are looking for places where they can mix fast delivery with socially pleasant environments.

Within the Restaurant, Fast-Food & Food Delivery industry, 5 to Go remains the leading brand for the second consecutive year. However, it moved down 11 places in the overall 2022 CX ranking.

On the other hand, Starbucks is the only brand in the industry that managed to increase its CX score, which is most likely due to its recent sustainability initiatives and strong marketing campaigns involving partnerships with well-known influencers.

Moreover, it marked the highest increase in Personalization (+0.34 points) at the industry level. This is the result of the company's efforts to account for the needs of the individual rather than treating everybody as the same. For example, their initiatives have included the introduction of vegan options, personalized drinks, personalized offers in the Starbucks loyalty club etc.

All these, coupled with the recent availability of the Starbucks brand on delivery platforms led to this year's brand's growth.



I am very pleased by the interaction with this brand. The meals can be customized, and the products are always fresh.

The recipes they use are innovative and the staff is friendly. In my opinion, the hygiene in the restaurants is a big plus.

I would like the brand to be accessible on all of the available food delivery apps.



Female, 32, Craiova

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Top 5	Brand	CX ranking	CX Score
1	5 to go	13	8.57
2	Glovo	31	8.39
3	Salad Box	38	8.36
4	Bolt Food	41	8.34
5	Starbucks	42	8.33

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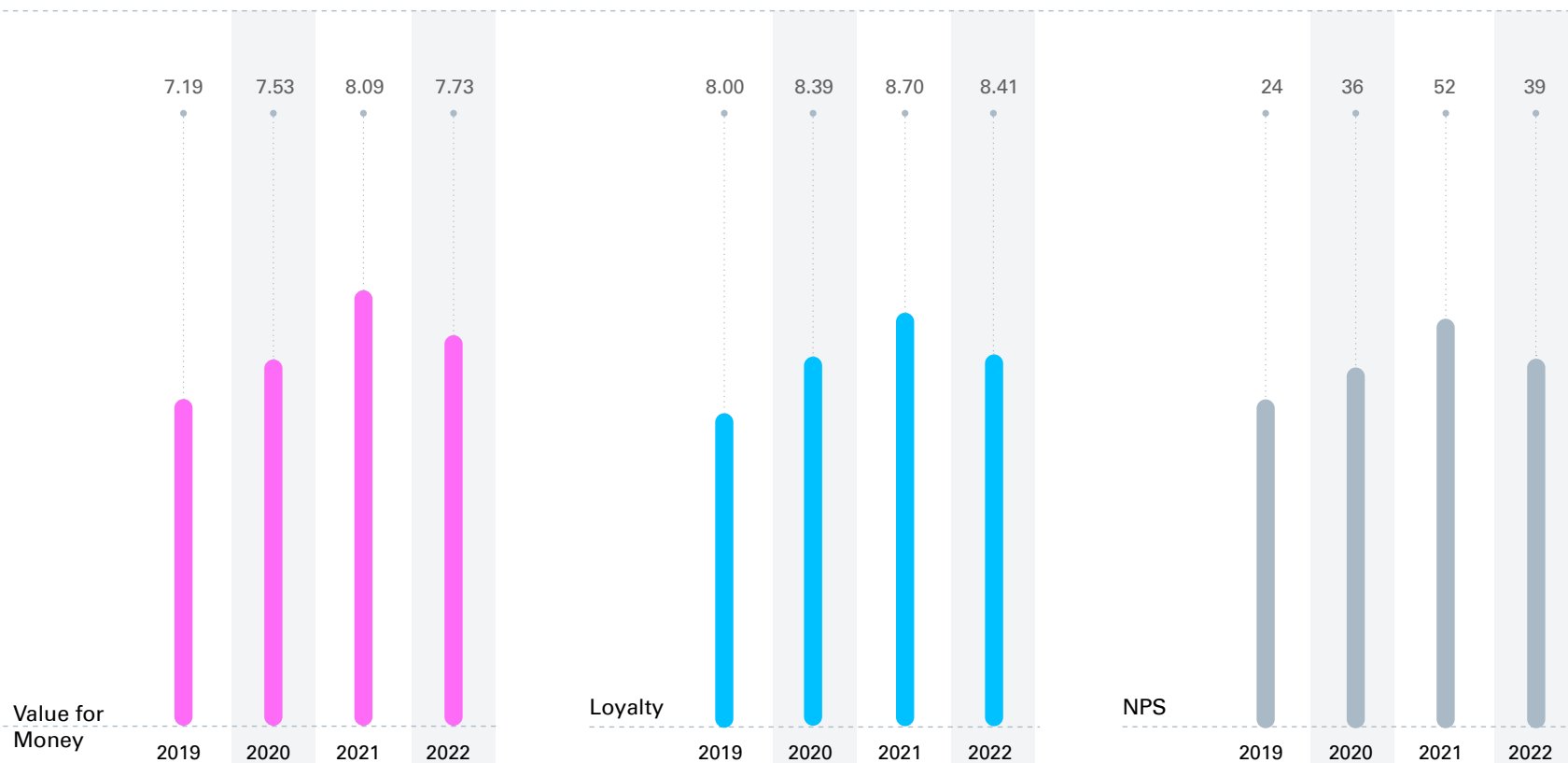
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The Evolution of Market KPIs 2019-2022



The Evolution of the Restaurant & Fast Food Delivery Industry 2019-2022



Personalisation



Time & Effort



Expectations



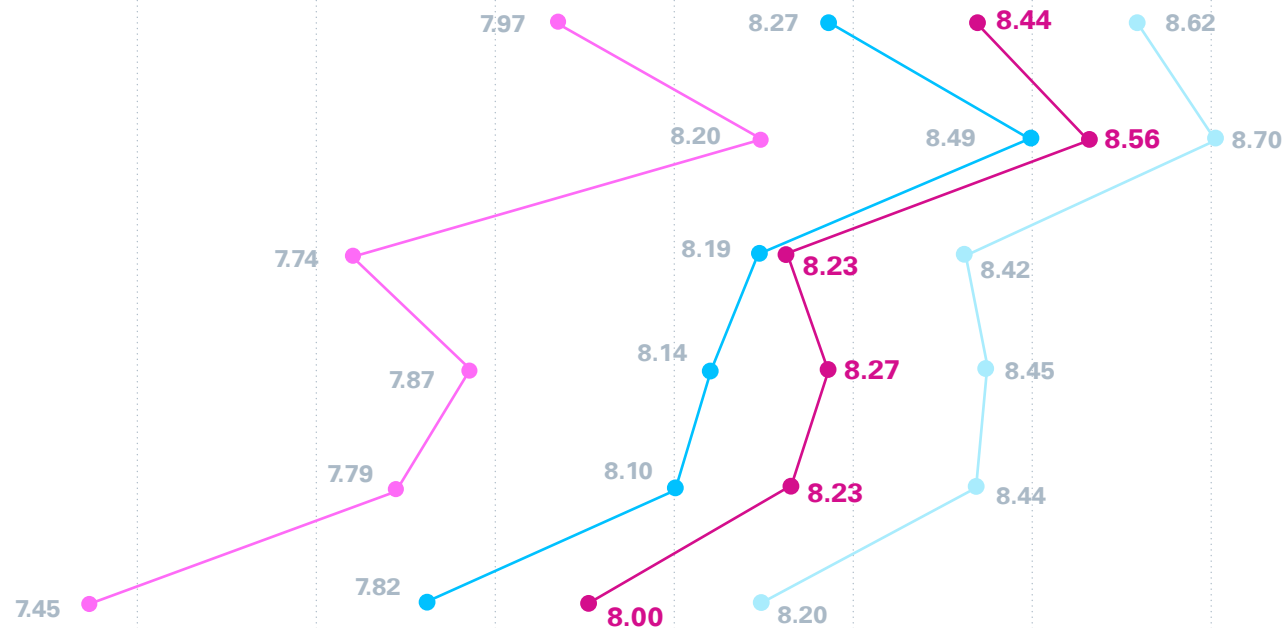
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Resolution



Empathy



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Non-Grocery Retail



Sector Champion

FarmaciaTei.ro

CX Score: 8.84

Highest CX Score increases from last year

Mobexpert

CX Score: 8.50

+0.50 points increase vs. 2021

Highest YOY Pillar increase

Empathy (+0.2%)

Non-Grocery retail is the second-best performing industry, yet it maintained the same CX Score as last year (8.26 points). The industry scores average increases across 5 of the 6 Pillars of Customer Experience Excellence, with Empathy witnessing the greatest year-on-year growth (+0.2%), indicating the efforts brands are making to understand their clients' needs.

The development of digital channels in non-grocery retail has further generated growth for the sector.

Cosmetic Retail is this year's leading sub-industry (8.55), followed by Clothing Retail on a par with Online Retail (8.43).

The leading brand in the Non-grocery sector remains FarmaciaTei.ro (8.84). However, in the overall ranking, it lost its leadership position, having dropped one place to become this year's runner-up.

Mobexpert is the brand that marked the highest upward movement (+0.50 points) in the CX ranking at market level. This is the result of the brand investing in digitalization and process efficiency, including options such as 48h delivery, in-store free interior design consulting services and a virtual budget planner that offers an enhanced shopping experience and accurate prices.

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Brands need to keep an eye on their customers' changing behavior and place their bets on digitalization of processes, superior user experience (UX), enhanced customer experience (CX), and marketing technologies. This should result in personalized, fast, and seamless experiences delivered to customers' doors.



This is my favorite pharmacy, I find almost everything I need at a considerably lower price.

This is where I go to find the information I need if I am not sure about the products I want to buy.

I am very satisfied with the experience in this pharmacy and the fact that the queues have started to become shorter.



Male, 27, Constanta

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Top 5	Brand	CX ranking	CX Score
1	FarmaciaTei.ro	2	8.84
2	Cărturești	3	8.79
3	Notino (Aoro.ro)	4	8.68
4	H&M	5	8.62
5	Catena	6	8.61

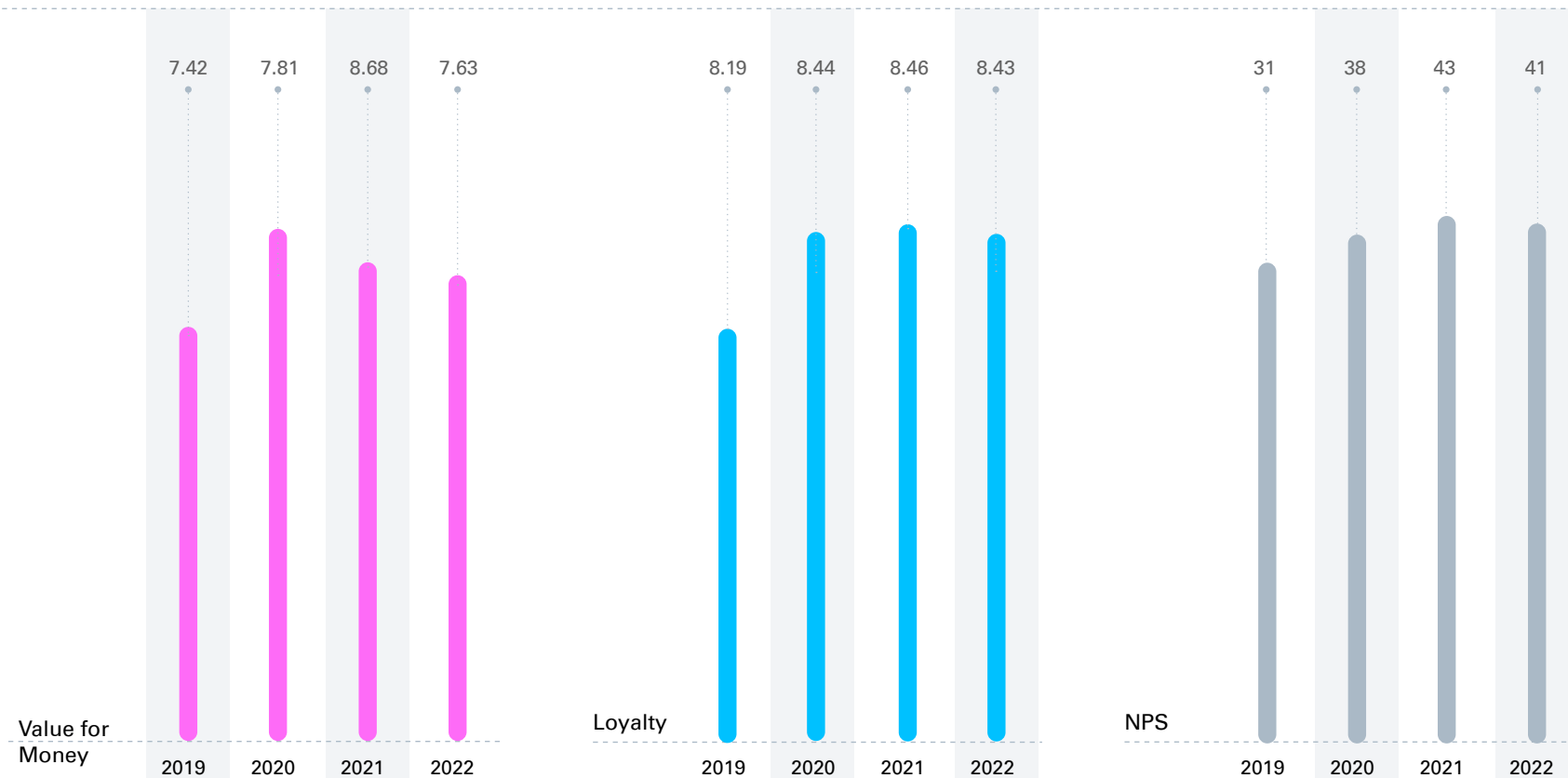
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Personalisation



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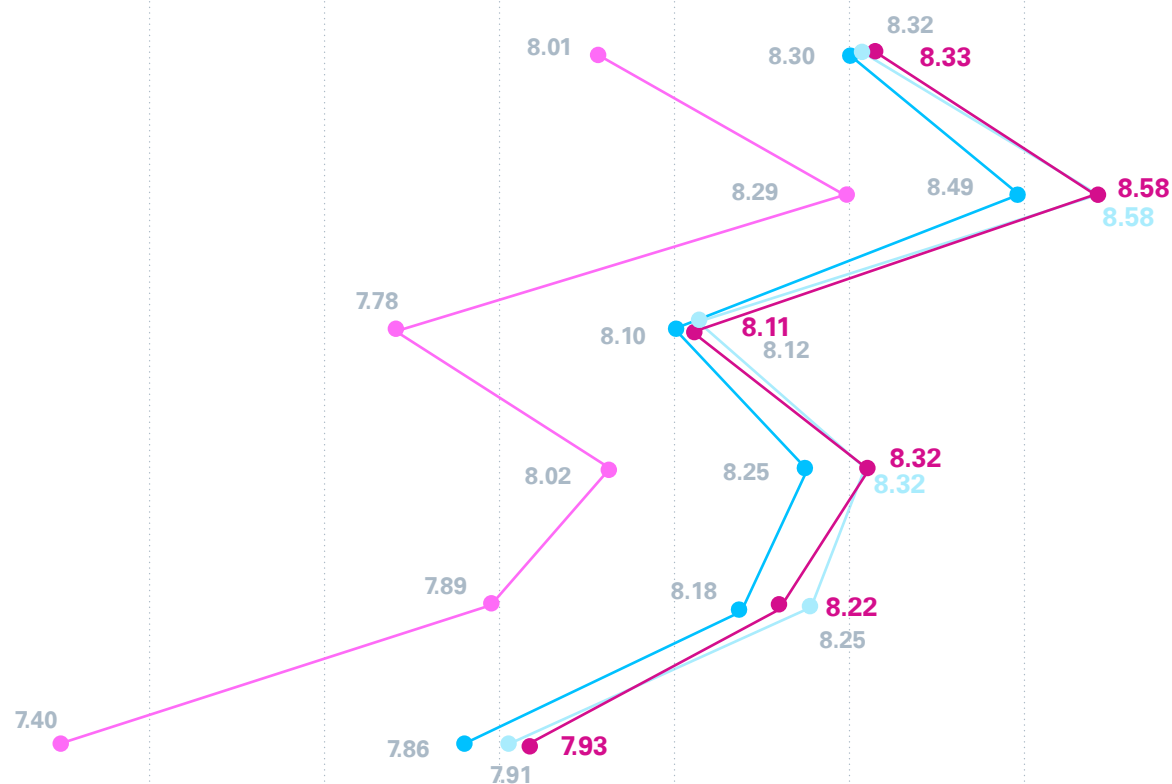
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Financial Services



Sector Champions

PayPal and ING Bank

CX Score: 8.60

Highest CX Score increases from last year

CEC Bank

CX Score: 7.85

+0.27 points increase vs. 2021

Highest YOY Pillar increase

Empathy (+1.1%)

The financial sector is the third-best performing sector within the Romanian market in 2022, with a CX Score of 8.24. Looking at the ranking of the financial services providers that make up the sector, technology is a clear driver.

The top 3 performers are PayPal, ING Bank, and Revolut an interesting mix of companies: two of them are fully digital, while ING is a strong player both online and offline.

The development of digital financial services goes hand in hand with the expansion of e-commerce. Additionally, the forced lockdowns in 2020 drove banks to adapt and provide more remote services, from account opening to credit approval. Thus, increased availability of remote services has led to a more streamlined experience and a higher adoption of financial services without the inconvenience of the need to be physically present at a branch.

Empathy is the pillar with the highest year on year growth in 2022, with an increase of 1.1% compared to 2021. This shows that financial institutions invested in solutions that account for the circumstances of their customers and offered increased flexibility, protection, and accessibility.

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On the other hand, the only indicator that recorded a drop is Value for Money which lost 0.6% compared to 2021.

This illustrates the fact that people expect more from banks, particularly now when inflation is rising.

It was observed that consumers' interest in savings accounts decreased and this was attributed to the low-interest rates, below the rate of inflation.



I've been a customer at this bank for more than 5 years, and I've never had any issues. Both the online and offline experiences were pleasant.

The staff is always friendly and answers my questions promptly. One of the things I value most about this bank is how digital it is.



Female, 33, Cluj-Napoca

It seems that banks need to uncover the real needs of their customers, which are the result of the changes in everyday life over the past two years.

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1	PayPal	7	8.60
2	ING Bank	8	8.60
3	Revolut	12	8.59
4	Allianz	17	8.54
5	Raiffeisen Bank	28	8.42

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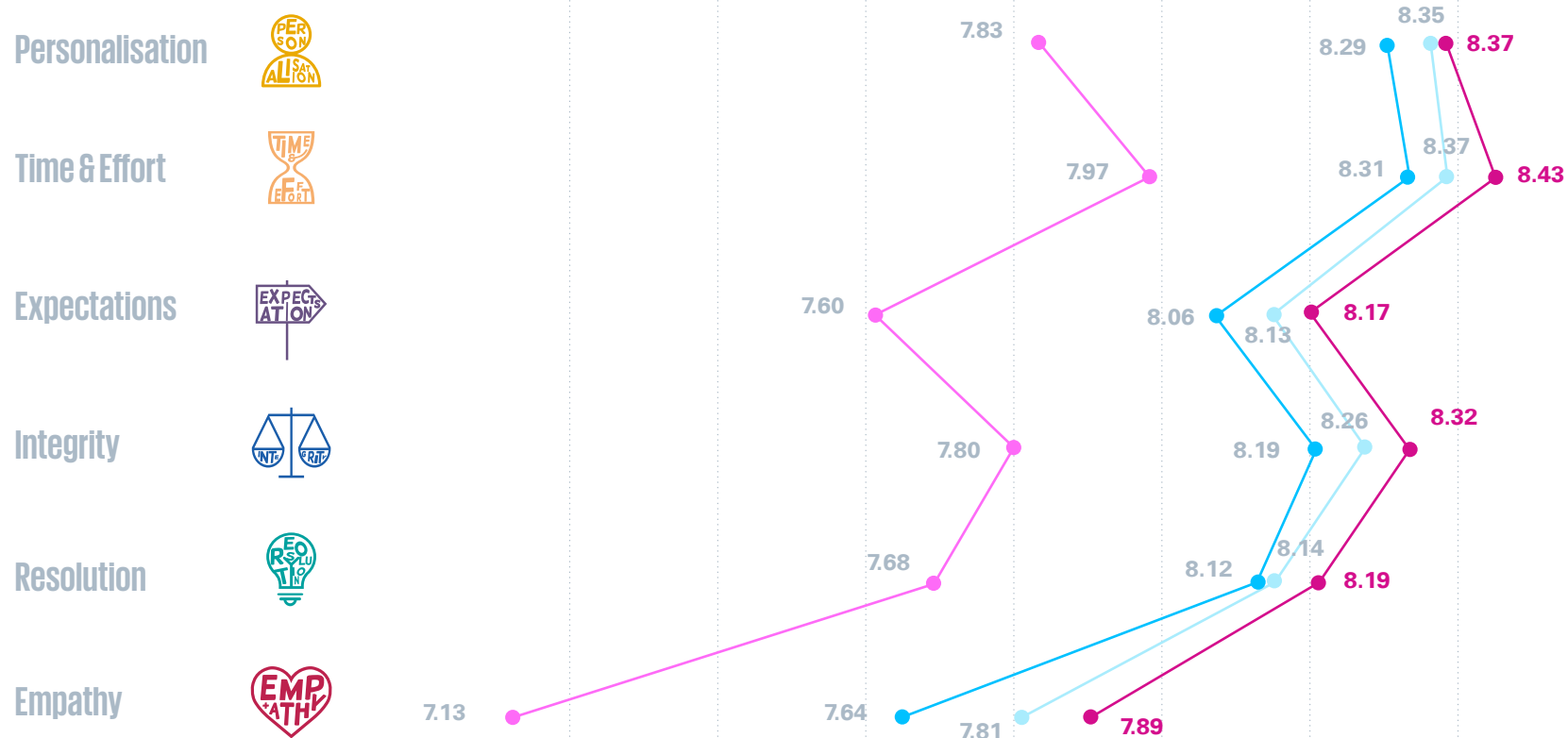
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Sector Champion

Sameday

CX Score: 8.26

Highest CX Score increases from last year

Sameday (+0.39 points) = 8.26

CX Score: 8.26

+0.39 points increase vs. 2021

Highest YOY Pillar increase

Expectations (+1.2%)

In 2020, the logistics industry recorded strong results, with couriers playing an essential role during the pandemic and companies investing in improving their customer experience.

However, the pace of growth in the industry in terms of CX has since slowed; during 2021, it increased its performance in only two out of the six pillars: Expectations by 1.2% and Time & Effort by 0.12%.

This reflects the industry's attempts to continue streamlining its services in order to meet customers' increasingly high expectations.

Brands on the local market opened new hubs across the country and invested in green transportation services and digital transformation, as well as automating their customer support services. All these addressed both customers' demands and brands' strategic roadmap towards financial and sustainability growth.

Loyalty to favorite logistics brands appears to have eroded, as it decreased by 1.29%, as compared to last year. This demonstrates customers' volatility in supplier selection, placing more pressure on businesses to become more customer-centric and make efforts to provide visibility and support during the delivery process.

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Sameday is this year's sector champion and registered the highest growth across all pillars, improving its overall CX Score by 0.39 points compared to last year.

This is the result of the brand's commitment to investing in solutions that translate into reduced time and effort among customers and increased convenience.

The development of a network of proximity delivery spaces called "easy boxes" to which Sameday delivers some of its parcels gives more flexibility to customers.

The Romanian Logistics industry continues to develop as the demand for e-commerce is on the rise, despite inflation and the geopolitical context.

Today's customers rely even more on logistics services than they did two years ago because of convenience, as services are easy to access, with high coverage, and a high level of digitalization.

The future of the logistics industry is dependent on companies' ability to recognize and meet the dynamic demands of today's customers.



A serious, fast and punctual company! I have always received the orders intact and without any problems. I recommend it to everyone!



Female, 25, Bacău

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Top 5	Brand	CX ranking	CX Score
1	Sameday	54	8.26
2	TNT	55	8.25
3	FAN Courier	71	8.14
4	GLS	74	8.13
5	Cargus	80	8.09

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Time & Effort



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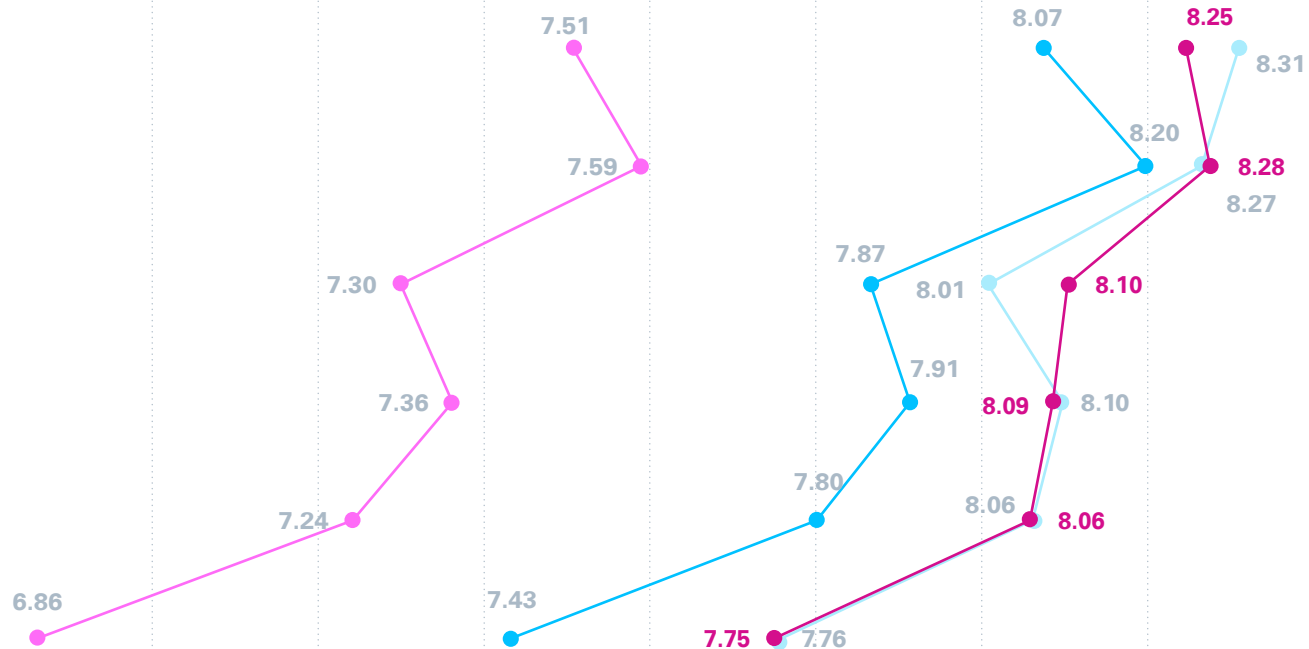
Integrity



Resolution



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Grocery Retail

Sector Champion

Bringo

CX Score: 8.89

Highest CX Score increases from last year

Bringo (+0.25 points) = 8.89

CX Score: 8.89

+0.25 points increase vs. 2021

Highest YOY Pillar increase

Empathy (+0.8%)

Since 2021, Bringo has expanded the range of products and vendors customers can access through their app. Thus, it increased convenience and reduced customers' perceived effort. This can be seen in the company's development in some of the pillars.

Time and Effort (9.15, +0.36 points) and Resolution (8.90, +0.33 points) were the pillars that recorded the most significant increases.

After three consecutive years of continuous growth in all of the Six Pillars of Customer Experience Excellence, the grocery industry is facing a decrease in two important pillars, Integrity (-0.45%) and Resolution (-0.52%).

Traditional business models are lagging, while disruptors, as we saw last year, are providing the best experience within the sector.

Bringo, the personal shopper mobile app, is leading the grocery retail sector and the market overall, and is the #1 brand in 2022.

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The contrast is noteworthy between the sector's pillar with the highest drop, which represents the strength of this year's market leader: Resolution. This, once more, indicates that addressing customers' core needs is essential for improved customer experiences.

Overall, grocery retail seems to be passing through turbulent times.

Established companies within this sector are in search of new business models, and are aware that traditional

grocery retail cannot ensure long term success.

Grocery retailers have started reducing the surfaces of their stores and renting out areas to create new revenue streams, while others are actively increasing their footprint.

Moreover, they seek solutions to increase convenience and get closer to customers by joining shopping apps.

Finally, in an attempt to reach new markets, retailers seem to be finding value in smaller markets as well, aiming for country towns.



I was impressed that every time a product was out of stock I was called and asked if I wanted something else instead.

The orders are complete and properly packed, and the couriers are always serious, prompt, and kind.



Female, 48, Brasov

Top 5	Brand	CX ranking	CX Score
1	Bringo	1	8.89
2	Lidl	26	8.43
3	Kaufland	49	8.30
4	Selgros Cash & Carry	62	8.19
5	Auchan	75	8.13

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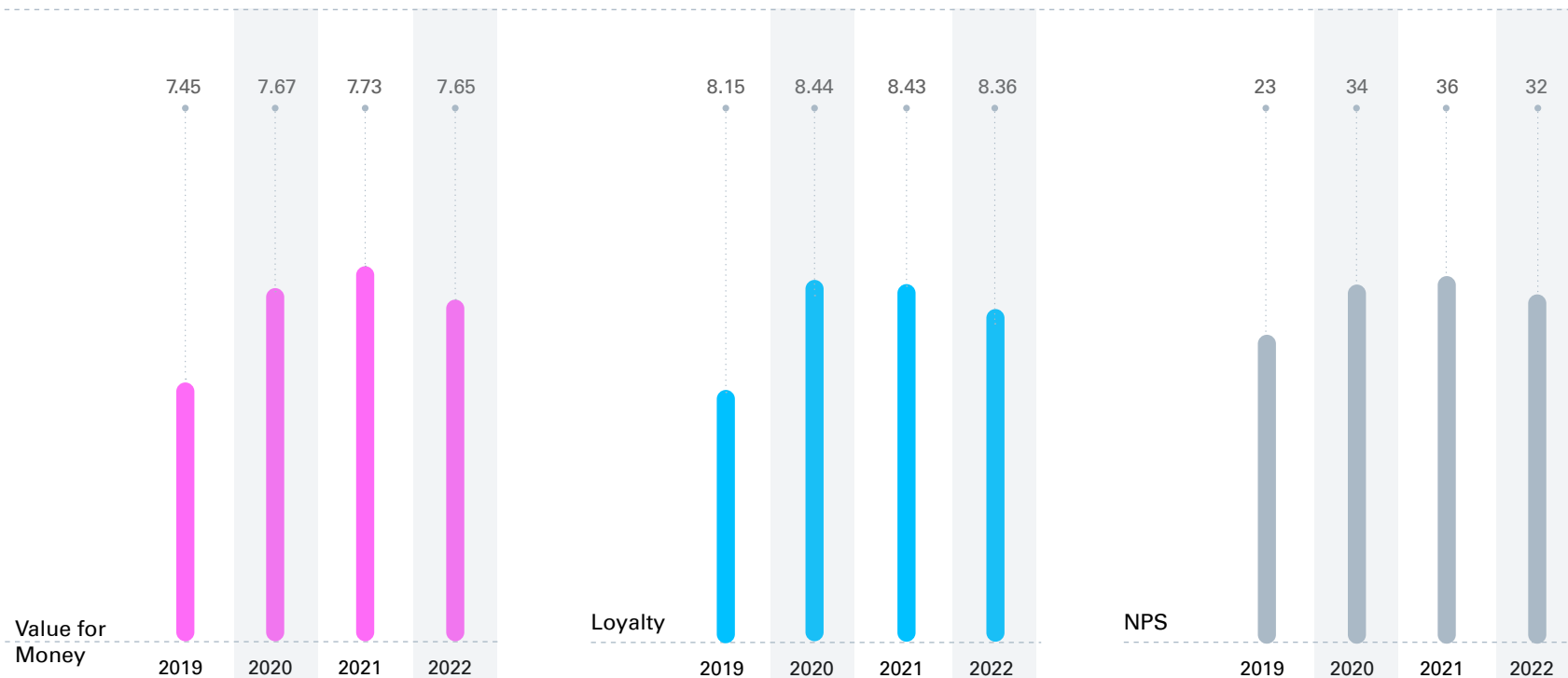
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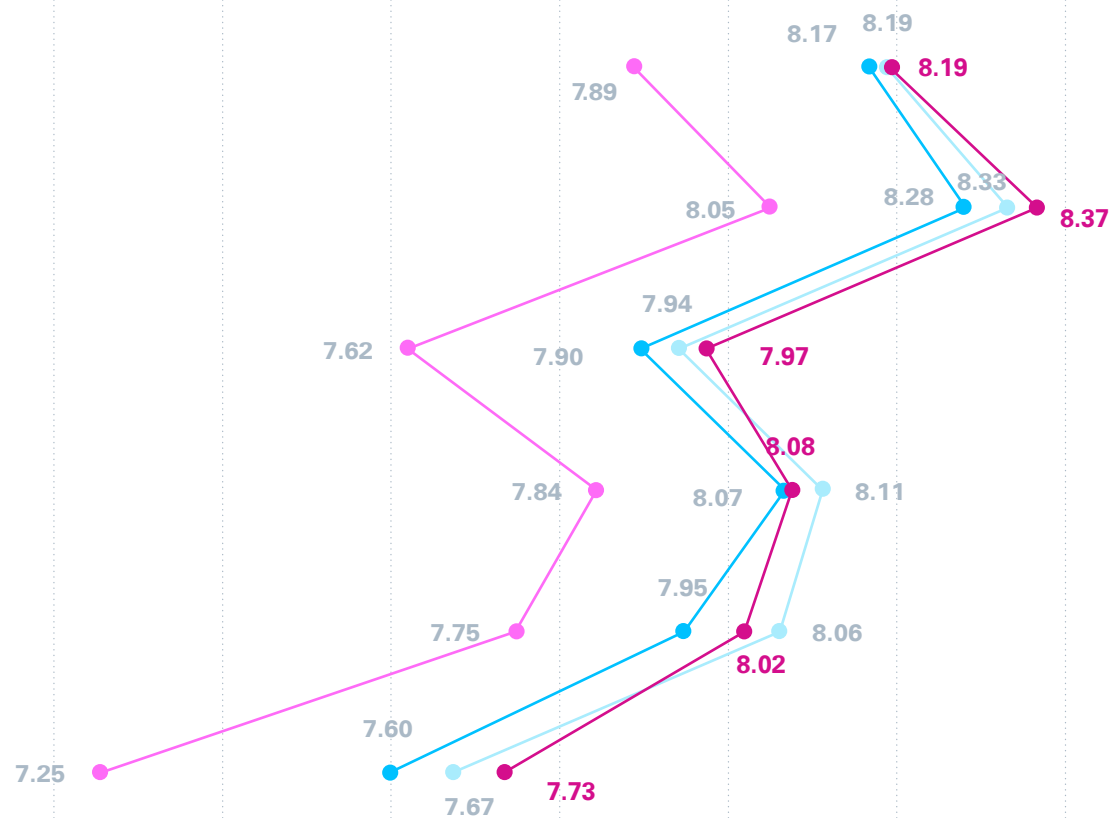
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Sector Champion

Digi (RCS&RDS)

CX Score: 8.47

Highest CX Score increases from last year

Digi (RCS&RDS)

CX Score: 8.47

+0.35 points increase vs. 2021

Highest YOY Pillar increase

Empathy (+1.5%)

The Telecom industry is one of the few industries that managed to increase its CX Score in 2022.

It registered increases among 5 Pillars, the exception being Personalization for which it lost 0.18 points as compared to last year.

There are four main players within the industry and one of them managed to stand out in 2022, advancing 55 places in our CX Ranking, namely Digi (RCS&RDS).

Digi (RCS&RDS) increased its performance across all of the 6 Pillars of Customer Experience Excellence, but mostly Expectations, for which it achieved an increase of 0.42 points, obtaining a score of 8.44 points.

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Over the last year, Digi (RCS&RDS) has invested in developing its fiber-optic network, and therefore, it has improved the quality of the services it supplies for over 90% of its internet customer base.

The company was the first Romanian telecommunications provider to launch an internet subscription with a speed of 10 GBps at the end of 2021. Consequently, delivering on its promises helped Digi improve across all of the 6 Pillars, and made it the leader in the Telecom industry.

Digital by nature, the telecom industry is of course powered by digital advancements and technology. However, rising energy prices pose challenges to the telco giants as investments no longer seem feasible.

Overall, telecom is becoming a commodity industry, with companies struggling to differentiate at the product level, and we have seen the impact of Personalization.

Therefore, customer experience is becoming an increasingly critical factor.



I have a subscription for my mobile phone and the internet at home. The internet is fast and high quality. Having an office in our town is a plus.



Female, 61, Alba

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Top 4	Brand	CX ranking	CX Score
1	Digi (RCS&RDS)	23	8.47
2	Orange	64	8.19
3	Vodafone	105	7.71
4	Telekom	120	7.10

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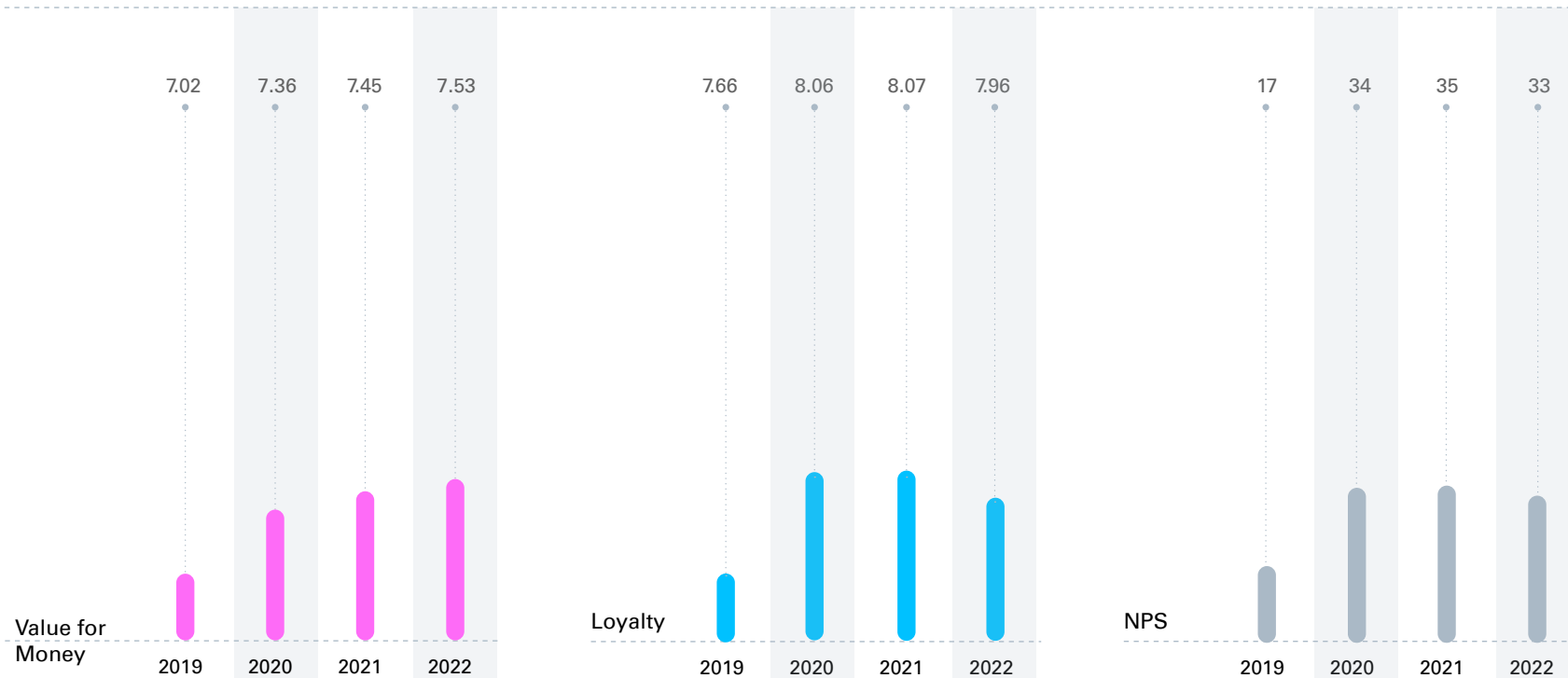
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The Evolution of the Telecom Industry 2019-2022



Personalisation



Time & Effort



Expectations



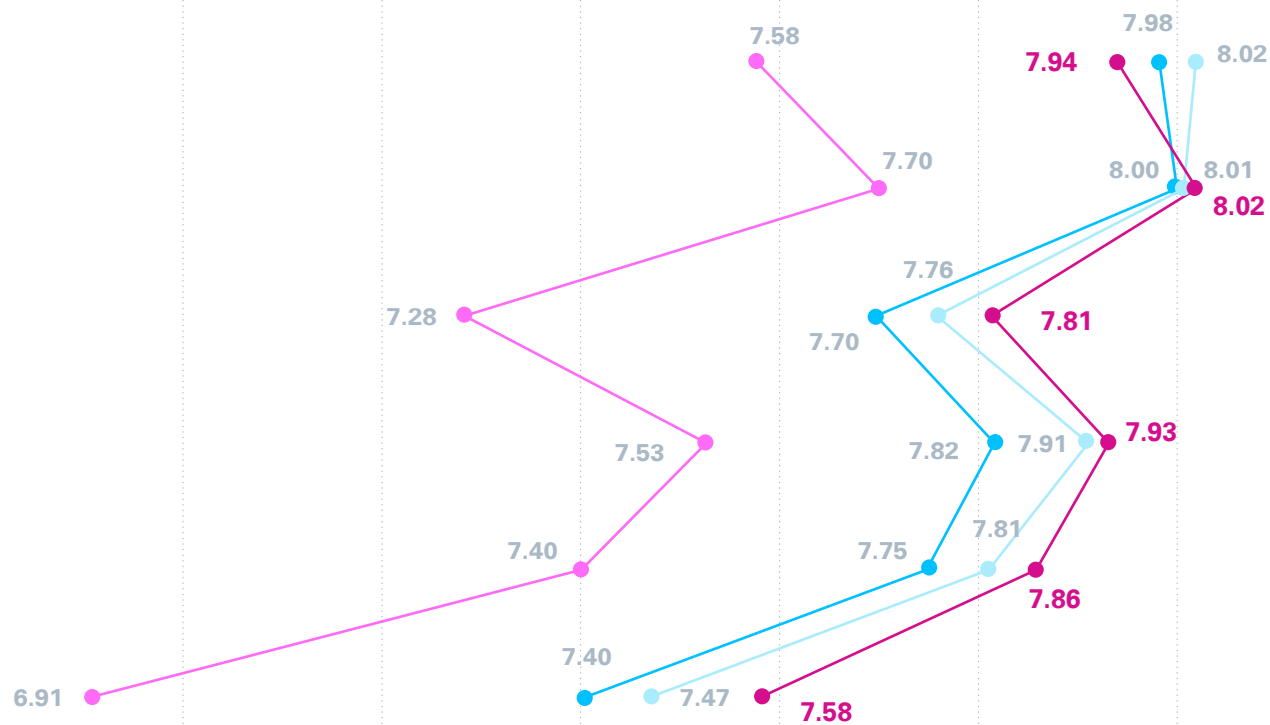
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Travel & Hotels

Sector Champion

Bolt

CX Score: 8.35

Highest CX Score decrease from last year

Blue Air

CX Score: 7.25

-1.24 points decrease vs. 2021

Highest YOY Pillar decrease

Expectations (-7.4%)

Travel & Hotels is the industry that registered the highest drop in the CX Score in 2022 (-6.7%).

This is the result of an unprecedented increase in fuel and utility prices, which forced companies within this industry to raise their prices by 10-15% as compared to 2021.

Consequently, this had a direct impact on customers' perceptions of the experience provided by travel companies.

Value for money recorded the most significant year-on-year decrease (-7.6%), indicating customers' preference for booking vacations abroad over national destinations due to their high prices and low-quality services.

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Bolt is the sector champion in the Travel & Hotels industry, yet it left the top 10, landing in 40th place in the 2022 CX ranking.

The company is expanding and investing in its marketing and sustainability strategies, introducing initiatives such as the "Women for Women" tool to encourage gender equality and safety measures.

Blue Air was the brand that saw the most significant decrease among all pillars. Time&Effort was hard hit by the new context with a 15.3% decrease as compared to 2021. In general, airlines found themselves facing a challenging context.

On the one hand, demand increased after Covid restrictions were removed.

On the other hand, airlines experienced setbacks in their services as a result of the job cuts which took place during the pandemic.

Therefore, they were faced with high demand and the operational inability to address it, which led to a negative customer experience.



I like to use this company's services because they are prompt and it is much cheaper than taking a taxi. The experience is pleasant every time.



Female, 46, Galați

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1	Bolt	40	8.35
2	Uber	73	8.14
3	Tarom	107	7.67
4	Ryanair	108	7.65
5	Wizzair	112	7.53

The Evolution of Market KPIs 2019-2022



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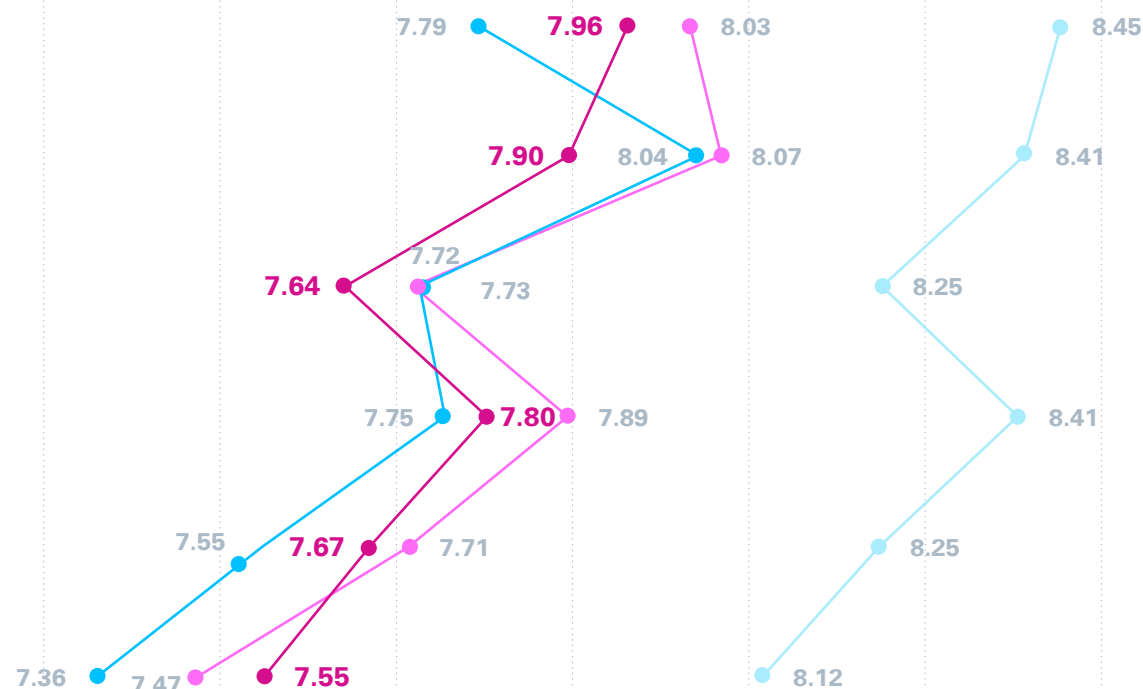
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Sector Champion

CEZ Romania

CX Score: 8.39

Highest CX Score increase from last year

CEZ Romania

CX Score: 8.39

+0.24 points increase vs. 2021

Highest YOY Pillar decrease

Integrity (-2.03%)

Possibly one of the most challenged and volatile sectors, the utilities industry has recently been and still is subject to constant changes as a result of the unstable legislative environment.

The instability can also be seen at the CX data level; this year's results were marked by a generalized downward trend among all the pillars.

Integrity recorded the highest drop, going down 2.03% as compared to 2021, reaching 7.57 points.

This is the result of the erosion of consumers' trust in utilities companies and authorities due to today's unstable economic context characterized by energy prices being continuously on the rise, together with an unprecedented high level of inflation, unclear support schemes, and burdensome access to cheaper and greener energy sources.

The numerous changes in legislation, the state support schemes for the population, and invoicing regulations have generated turbulences within utilities companies and their internal systems, which further translated into lower quality of services towards private customers and lower satisfaction.

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All these factors also translate into how customers perceive Value for Money.

This dropped by 6.69% on a year-on-year basis, indicating the overall dissatisfaction customers experience as a result of the increased prices of energy and weak customer services as indicated by this year's CX respondents.

CEZ Romania is the only brand that managed to increase its CX Score. The company advanced 39 places within the CX ranking, landing at 32.

It seems that Empathy (+0.43), the brand's sympathetic attitude towards its customers during these less fortunate times is what helped the brand grow.

Utilities providers ultimately represent the entire utilities ecosystem in consumers' eyes.

Therefore, these companies are expected to have solid grounds for price increases, account for customers' particular circumstances, and offer personalized solutions promptly.



There was a day when I faced some technical problems. I called the customer service, I informed them about the problem and they addressed it quickly.



Male, 30, Argeş

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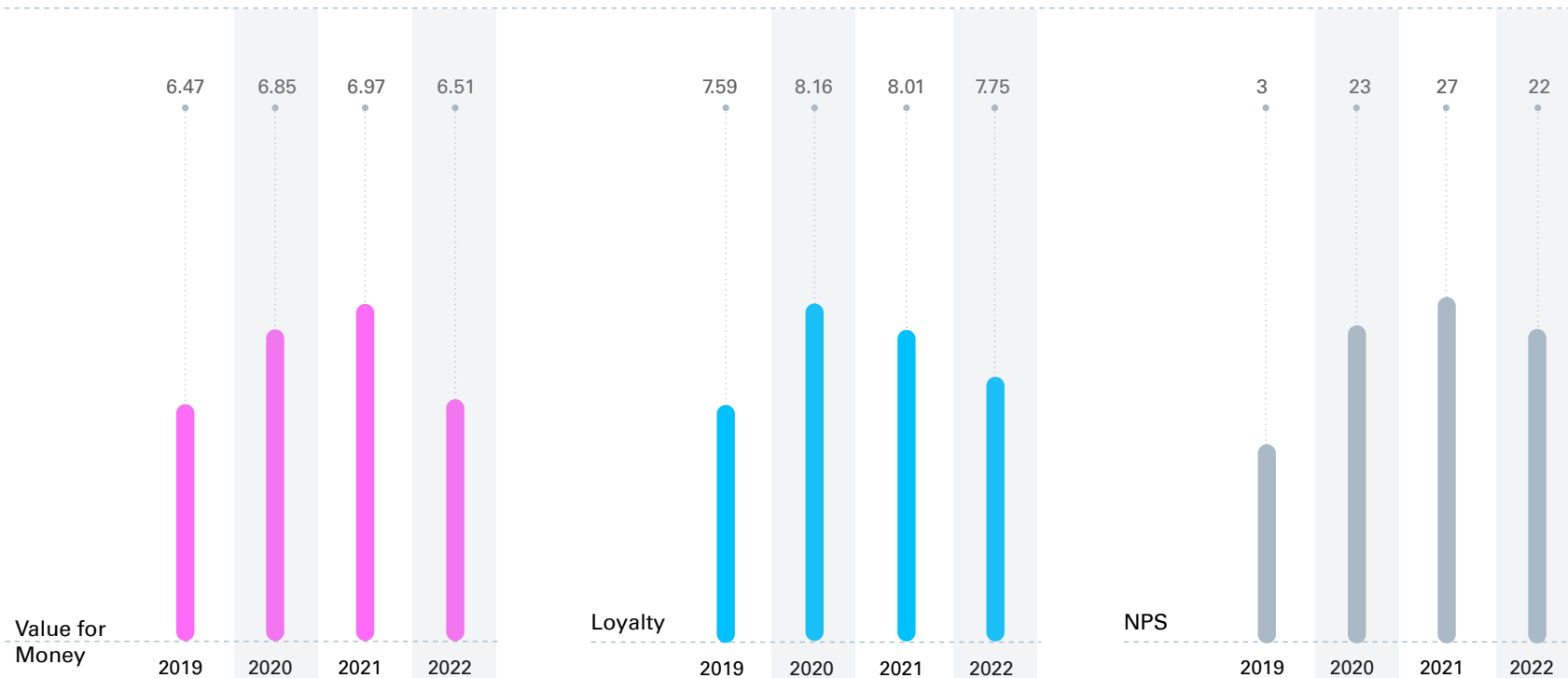
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Top 5	Brand	CX ranking	CX Score
1	CEZ Romania	32	8.39
2	E.ON	113	7.49
3	ENGIE	114	7.43
4	Electrica	116	7.29
5	Enel	121	7.03

The Evolution of Market KPIs 2019-2022



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Expectations



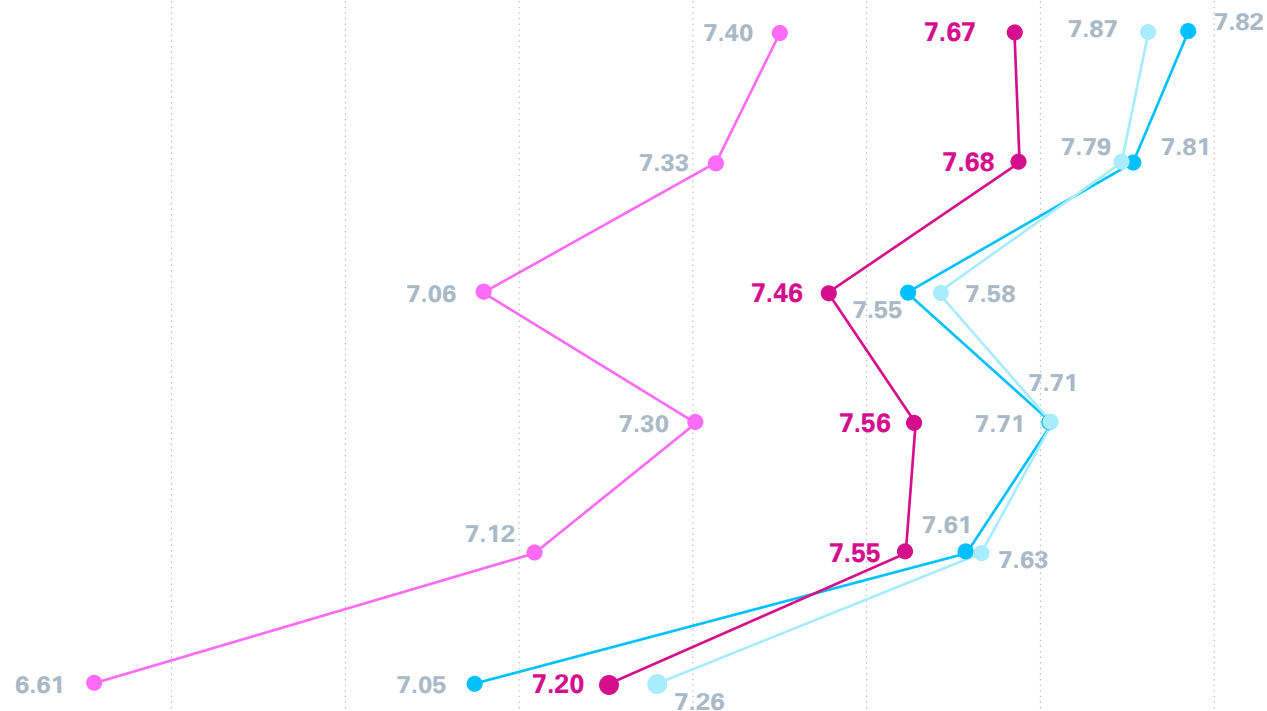
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Taking the CX data a step further- the CX maturity assessment

It is clear that customers change constantly and what was once a delighter can now be the norm. Customers' expectations are on the rise and consumers are willing to reward the brands that can deliver on their expectations.

When companies commit themselves to improving their customers' experiences it is crucial for them to choose the right areas to improve and to establish the correct investment strategy.

Otherwise, over- or under-investing in customer experience will lead to a loss in economic value.

Our Customer Experience Maturity Diagnostic Assessment helps companies determine how effectively they use

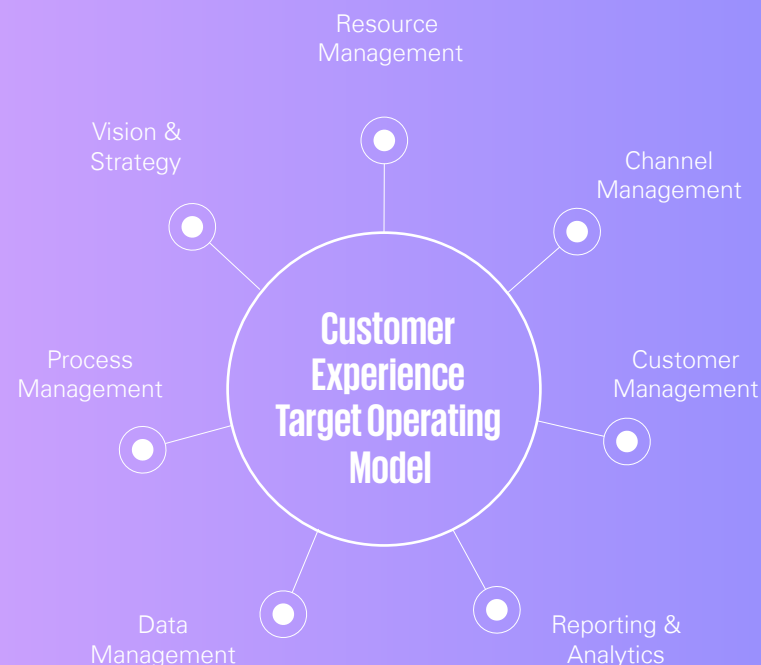
resources in order to deliver leading customer experiences.

The assessment is implemented as a survey that is disseminated at an organizational level.

The survey is built around the Customer Experience Target Operating Model

which focuses on the capabilities that should help a company deliver superior experiences.

These capabilities are grouped into eight categories, as follows: vision and strategy, process management, data management, reporting and analytics, customer management, channel management, resource management and tools and technology.



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For instance, under vision and strategy we will assess how well your company is performing in terms of the following capabilities:

experience strategy,

experience design approach,

experience innovation capability,

customer experience value and

enterprise alignment from a customer experience perspective.

This is a strategic tool that helps companies understand where they are today relative to where they should be.

We provide support as we develop the survey, collect the data, and generate insights in the form of a comprehensive report.

We can enrich the survey's findings with insights from the Voice of the Business, collected through qualitative interviews.

At the end of the assessment, we **provide you with recommendations and assistance in developing a**

high-level roadmap to help your internal teams during implementation.

Do you know how well your company is delivering on its customers' expectations? Are you investing in those decisions that can lead to excellent customer experiences?

Discover today with the help of the Customer Experience Maturity Diagnostic Assessment.



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KPMG Business Design Hub

The KPMG Business Design Hub is a new initiative under the KPMG Customer Experience umbrella. It is a hub of innovation and management thinking with no limitations, offering broad expertise in empowering people and businesses to translate their ideas into scalable solutions.

We leverage our hands-on experience to guide businesses through their challenges.

The KPMG Business Design Hub supports professionals with a set of courses built around the “new customer”.

These equip participants with the relevant knowledge and skills that help them refine innovations as well as further develop their leadership capabilities to drive growth.

What do we do at the KPMG Business Design Hub?

Based on design thinking, lean startup, and agile ways of working, we tailor courses that have their own combination of complementary tools and deliver more than theoretical concepts.

Choose which best addresses your professional or organizational needs:

- Introduction to Customer Experience
- Introduction to Employee Experience
- Customer Journey Mapping 101

Who are our courses aimed at?

Our courses are designed to suit any professional or customer-focus enthusiast, from any industry or sector of activity.

We break down complexity by introducing concepts gradually and presenting them through practical examples.

We also put to work all theoretical concepts through factual case studies, interactivity, and collaboration.

For more details and registration, please contact us at

businesshub@kpmg.com

In the meantime, you can sample course content and valuable business insights by viewing the detailed brochures on the dedicated webpage and checking the diary for upcoming ones available here: **<https://bit.ly/3URyuFM>**

Experience the insights of our KPMG Business Design Hub firsthand in these recorded Strategy Talks on The Role of Innovation in Strategy: **<https://bit.ly/3G3Kkrb>**

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For thirteen years, KPMG's Customer Experience Excellence Center has been researching customers' individual experiences with brands.

In 2022, 25 countries took part in the survey and more than 2,400 brands were reviewed by nearly 89,900 consumers.

In Romania, 2,543 consumers were involved in our annual study, providing over 24,000 reviews for 123 brands. Initially, 140 brands were included in the survey, but only 123 were validated by the methodology as they received more than 100 reviews.

The data was collected through online surveys between 10 June and 1 July 2022. The participants in the research must have had at least one interaction with a brand in the past six months in order to qualify to take part in the survey.

The time limit ensures respondents' input is recent enough to ensure relevance of results.

The survey is structured in such a manner that each brand goes through the same set of questions. Respondents are asked to evaluate each brand's performance based on the Six Pillars of Customer Experience Excellence (CX) and, additionally, participants are asked to evaluate the brands in terms of advocacy, loyalty, and value for money.

Finally, we rank the brands according to their Customer Experience Excellence (CX) score. This is the 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.

Study overview

4

years of research experience on the Romanian market

10 June –
1 July

the data collection period

123

brands for which more than 100 answers were received and which were hence validated by our methodology

2,543

participants

53%

female

47%

male

12%

of the participants are from Bucharest

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