



DATA SNAPSHOT

Global Study: The State of Consumer Experience

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Global Study: State of Consumer Experience

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EXECUTIVE SUMMARY

This research is based on a study of 17,509 consumers from 18 countries: Australia, Brazil, Canada, France, Germany, Hong Kong, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Singapore, Spain, South Korea, Thailand, the United Kingdom, and the United States. The survey covered consumer experiences across 17 industries.* Some highlights include:

- + **Streaming media companies deliver satisfying experiences.** On average streaming media companies earned the highest satisfaction ratings from consumers across all surveyed countries, with 82% of respondents who had a recent experience with a streaming company rating it a 4 or 5 out of 5 stars.
- + **Hospitals and medical clinics rated highly in consumer trust.** Of the 17 industries we looked at, consumers in eight countries said they were most likely to trust hospitals/medical clinics.
- + **Japanese consumers are the hardest to please.** On average, consumers from Japan were the least likely to say they were satisfied with recent experiences or that they would recommend or trust an organization.
- + **Indian consumers were the most satisfied.** Indian consumers were, on average, the most likely to report feeling satisfied by their most recent experience with an organization across most industries.

**Data is limited to industries that reached a certain threshold of responses in each country.*

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Methodology

Consumer Satisfaction Levels Across Countries

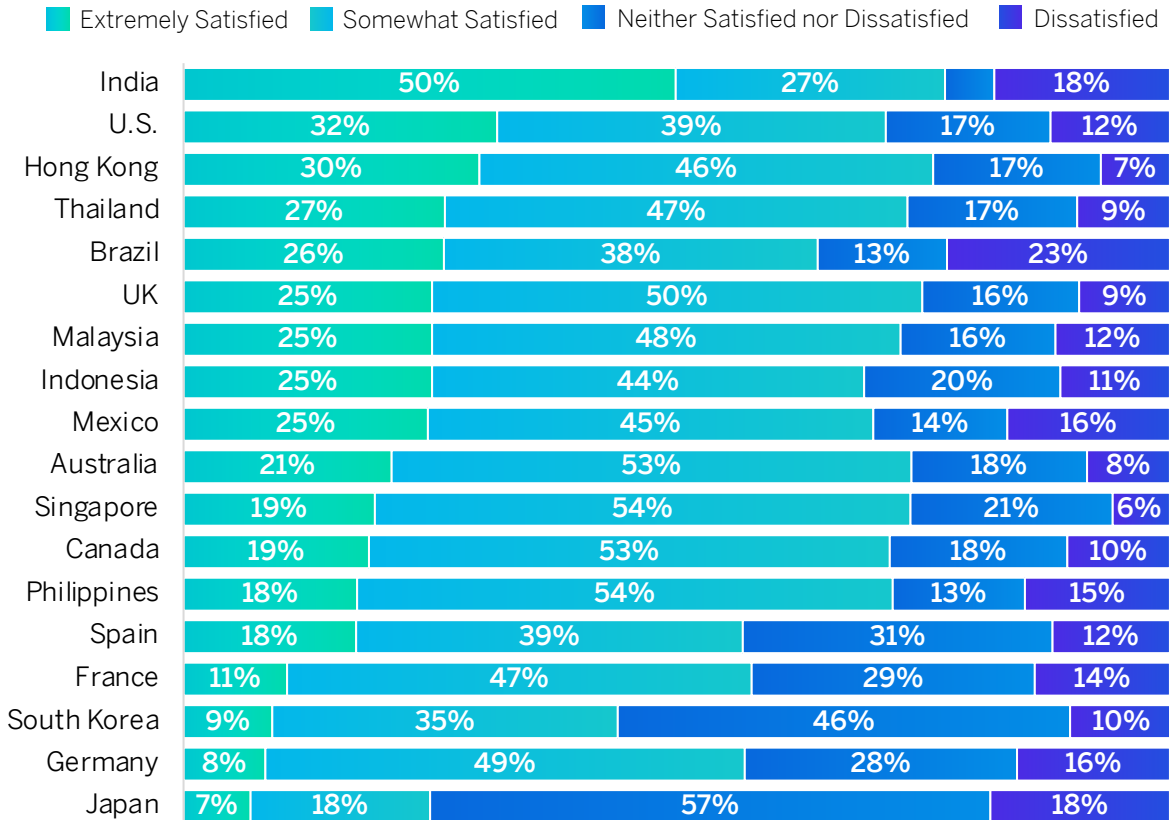
KEY TAKEAWAYS

- + On average, 66% of consumers said they were either “extremely satisfied” or “somewhat satisfied” with the experiences that organizations deliver.
- + India has the highest percentage of satisfied consumers (77%), followed by Hong Kong (76%), Thailand (74%), and Australia (74%).
- + Japan has the lowest percentage of satisfied consumers (25%), followed by South Korea (44%), Spain (57%), Germany (57%), and France (58%).

ABOUT

This chart shows how consumers from each surveyed country rate their satisfaction levels with the organizations they recently interacted with.

Thinking about the companies that you have recently interacted with, how satisfied are you with the experiences they deliver?



Consumer Satisfaction by Industry (Part 1)

KEY TAKEAWAYS

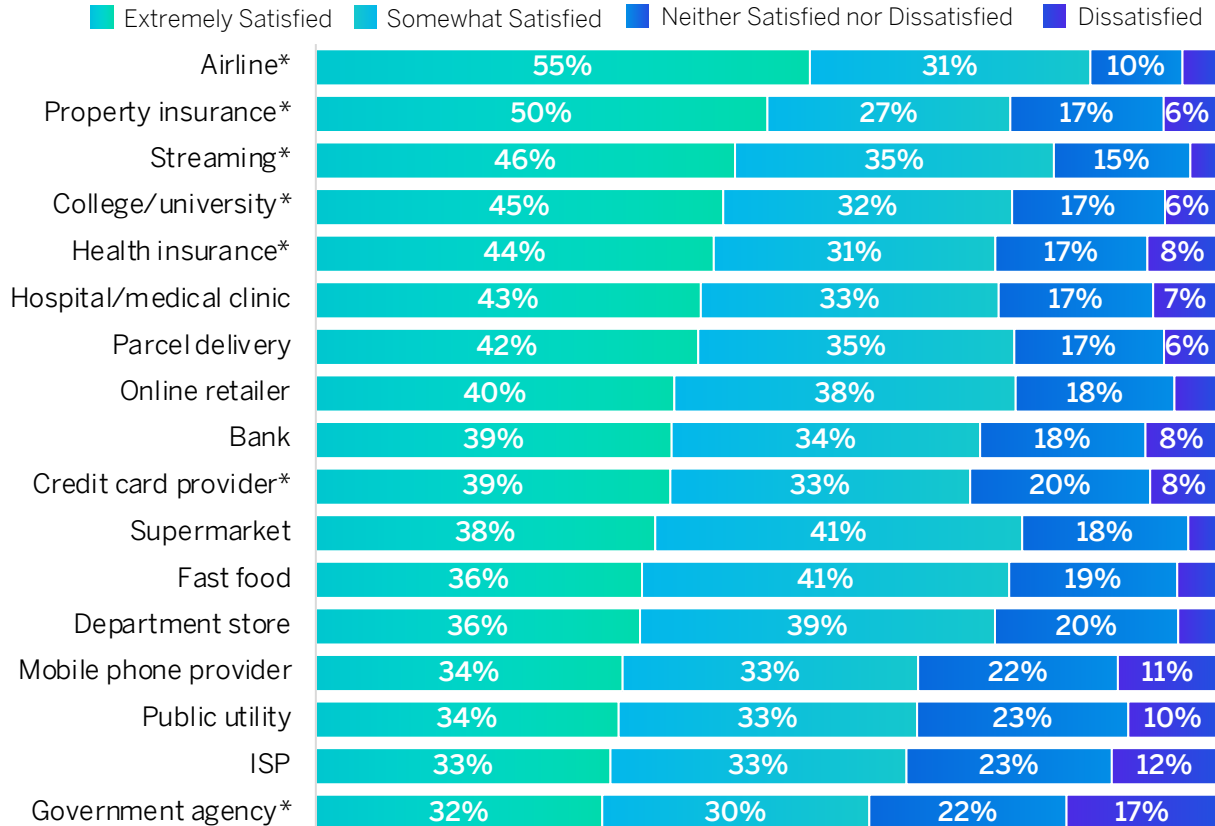
- + Streaming media companies earned the highest average satisfaction rating – consumers who said they were “extremely” or “somewhat” satisfied – at 82% based on data from all 18 countries.
- + Based on data from 12 countries, 17% of customers said they feel “dissatisfied” with their experiences with government agencies, the most of any industry.
- + There is a 23 percentage-point gap between the industry with the highest percentage of “extremely” satisfied consumers (airlines) and the lowest percentage of “extremely” satisfied consumers (government agencies).

ABOUT

This chart shows the average global satisfaction rating for each industry based on consumers’ recent interactions. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Satisfaction: Average Across All Countries

(Selected 1- to 5-star satisfaction rating)



*Data is from a limited number of countries

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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Consumer Satisfaction By Industry (Part 2)

KEY TAKEAWAYS

- + Consumers in India gave the highest satisfaction scores in 11 industries, while Japanese consumers gave the lowest in 10 industries.
- + The highest percentage of consumers were satisfied with streaming media services in Indonesia (92%), parcel delivery services in Indonesia (90%), and health insurers in Thailand (90%).
- + Consumers gave the lowest satisfaction ratings to mobile phone providers in Brazil (39%), public utilities in Japan (41%), and government agencies in Mexico (43%).
- + Mobile phone providers had the largest satisfaction gap across countries, with 46 percentage-points between India and Brazil.

ABOUT

This table shows, for each industry, which country had the highest and lowest percentage of consumers who felt satisfied (selected a 4- or 5-star rating) with their recent experiences. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are satisfied with their most recent experience

(Selected 4 or 5 stars on 5-star satisfaction rating)

	Country With Highest Satisfaction	Country With Lowest Satisfaction
Airline*	India: 87%	Indonesia: 85%
Bank	Indonesia: 88%	Japan: 44%
College or university*	India: 83%	Brazil: 65%
Credit card provider*	India: 89%	Japan: 50%
Department store	Indonesia: 86%	Japan: 58%
Fast food restaurant	Indonesia: 87%	Japan: 58%
Government agency*	India: 80%	Mexico: 43%
Health insurer*	Thailand: 90%	France: 59%
Hospital or medical clinic	India: 89%	Japan: 57%
Internet service provider	India: 84%	Japan: 45%
Mobile phone provider	India: 85%	Brazil: 39%
Online retailer	India: 89%	Japan: 59%
Parcel delivery service	Indonesia: 90%	Japan: 59%
Property insurer*	India: 88%	South Korea: 53%
Public utility	India: 80%	Japan: 41%
Streaming media service*	Indonesia: 92%	South Korea: 65%
Supermarket	India: 88%	Japan: 52%

**Data is from a limited number of countries*

Consumer Satisfaction By Industry (Part 3)

KEY TAKEAWAYS

- + Streaming media services have the highest percentage of satisfied consumers in seven countries, while hospitals/medical clinics had the highest percentage in four countries.
- + Government agencies have the lowest percentage of satisfied consumers in nine countries, while public utilities the lowest satisfaction ratings in three countries.

Consumers who are satisfied with their most recent experience

(Selected 4 or 5 stars on 5-star satisfaction rating)

	Industry With Highest Satisfaction	Industry With Lowest Satisfaction
Australia	Streaming: 83%	Government agency: 53%
Brazil	Streaming: 88%	Mobile phone provider: 39%
Canada	Hospital/medical clinic: 84%	Government agency: 58%
France	Streaming: 80%	Mobile phone provider: 53%
Germany	Streaming: 86%	Mobile phone provider: 65%
Hong Kong	Hospital/medical clinic: 80%	Fast food: 67%
India	Streaming: 91%	Government agency: 80%
Indonesia	Streaming: 92%	Government agency: 71%
Japan	Parcel delivery service: 59%	Public utility: 41%
Malaysia	Hospital/medical clinic: 81%	Government agency: 65%
Mexico	Streaming: 88%	Government agency: 43%
Philippines	Fast food: 85%	Government agency: 49%
Singapore	Supermarket: 76%	Internet Service provider: 64%
South Korea	Department store: 77%	Property insurer: 53%
Spain	Supermarket: 82%	Public utility: 49%
Thailand	Health insurance: 90%	Government agency: 58%
UK	Hospital/medical clinic: 85%	Public utility: 65%
U.S.	Online retailer: 89%	Government agency: 65%

ABOUT

This table shows, for each country, which industry had the highest and lowest percentage of consumers who felt satisfied (selected a 4- or 5-star rating) with their recent experiences. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Satisfaction By Industry (Part 4)

KEY TAKEAWAYS

- + Consumers in Japan were least likely to say they felt satisfied with their recent interactions with organizations in all five of the industries.
- + Consumers in Indonesia were most likely to say they were satisfied with three of the industries, while consumers in India were most likely to feel satisfied with the other two.
- + Supermarkets had the largest range of satisfaction scores between countries, with a 36 percentage-point gap between India and Japan.

Consumers who are satisfied with their most recent experience

(Selected 4 or 5 stars on 5-star satisfaction rating)

 Lowest-rated country  Highest-rated country

	Department store	Fast food restaurant	Online retailer	Parcel delivery service	Supermarket
Australia	76%	76%	79%	73%	82%
Brazil	73%	79%	72%	81%	74%
Canada	72%	77%	77%	74%	82%
France	69%	71%	75%	68%	73%
Germany	75%	76%	85%	73%	83%
Hong Kong	77%	67%	70%	75%	75%
India	85%	87%	89%	90%	88%
Indonesia	86%	87%	84%	90%	86%
Japan	58%	58%	59%	59%	52%
Malaysia	77%	79%	79%	77%	78%
Mexico	77%	85%	81%	87%	82%
Philippines	78%	85%	67%	80%	82%
Singapore	71%	71%	74%	73%	76%
South Korea	77%	68%	71%	75%	66%
Spain	74%	78%	79%	79%	82%
Thailand	81%	83%	82%	85%	81%
UK	71%	79%	84%	77%	83%
U.S.	77%	78%	89%	77%	84%

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Satisfaction By Industry (Part 5)

KEY TAKEAWAYS

- + Only India and Indonesia had enough respondents who had recently interacted with airlines to report on in this study.
- + Consumers in India were most likely to say they were satisfied with four of these six industries.
- + Consumers in Japan were least likely to say they felt satisfied with their recent interactions with organizations in three of these five industries.
- + Mobile phone providers had the largest range of satisfaction scores between countries, with a 46 percentage-point gap between India and Brazil.

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are satisfied with their most recent experience

(Selected 4 or 5 stars on 5-star satisfaction rating)

N/A Sample size too small Lowest-rated country Highest-rated country

	Airline	Bank	Credit card provider	Internet service provider	Mobile phone provider	Streaming media service
Australia	N/A	75%	N/A	66%	72%	83%
Brazil	N/A	63%	61%	53%	39%	88%
Canada	N/A	78%	78%	64%	66%	83%
France	N/A	66%	N/A	58%	53%	80%
Germany	N/A	73%	80%	69%	65%	86%
Hong Kong	N/A	73%	73%	72%	74%	75%
India	87%	86%	89%	84%	85%	91%
Indonesia	85%	88%	80%	78%	79%	92%
Japan	N/A	44%	50%	45%	43%	N/A
Malaysia	N/A	78%	71%	70%	75%	74%
Mexico	N/A	72%	65%	58%	68%	88%
Philippines	N/A	78%	63%	50%	66%	81%
Singapore	N/A	75%	76%	64%	67%	75%
South Korea	N/A	68%	63%	61%	63%	65%
Spain	N/A	58%	63%	64%	54%	77%
Thailand	N/A	85%	83%	81%	79%	88%
UK	N/A	80%	82%	72%	76%	83%
U.S.	N/A	86%	83%	68%	77%	81%

Consumer Satisfaction By Industry (Part 6)

KEY TAKEAWAYS

- + There were only enough interactions with property insurers in four countries to report on in this study.
- + Consumers in India were most likely to say they were satisfied with five of these six industries.
- + Public utilities had the largest range of satisfaction scores between countries, with a 39 percentage-point gap between India and Japan.

Consumers who are satisfied with their most recent experience

(Selected 4 or 5 stars on 5-star satisfaction rating)

N/A Sample size too small Lowest-rated country Highest-rated country

	College or university	Government agency	Health insurer	Hospital or medical clinic	Property insurer	Public utility
Australia	N/A	53%	75%	80%	N/A	69%
Brazil	65%	N/A	63%	66%	N/A	58%
Canada	N/A	58%	N/A	84%	N/A	74%
France	N/A	N/A	59%	70%	N/A	60%
Germany	N/A	N/A	67%	76%	N/A	65%
Hong Kong	N/A	N/A	N/A	80%	N/A	72%
India	87%	80%	89%	89%	88%	80%
Indonesia	85%	71%	81%	76%	83%	76%
Japan	N/A	N/A	N/A	57%	N/A	41%
Malaysia	80%	65%	78%	81%	N/A	72%
Mexico	76%	43%	N/A	72%	N/A	61%
Philippines	79%	49%	75%	75%	N/A	65%
Singapore	N/A	74%	73%	76%	N/A	70%
South Korea	N/A	56%	N/A	68%	53%	69%
Spain	N/A	N/A	N/A	71%	N/A	49%
Thailand	N/A	58%	90%	77%	83%	76%
UK	N/A	66%	N/A	85%	N/A	65%
U.S.	N/A	65%	80%	80%	N/A	78%

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Advocacy by Industry (Part 1)

KEY TAKEAWAYS

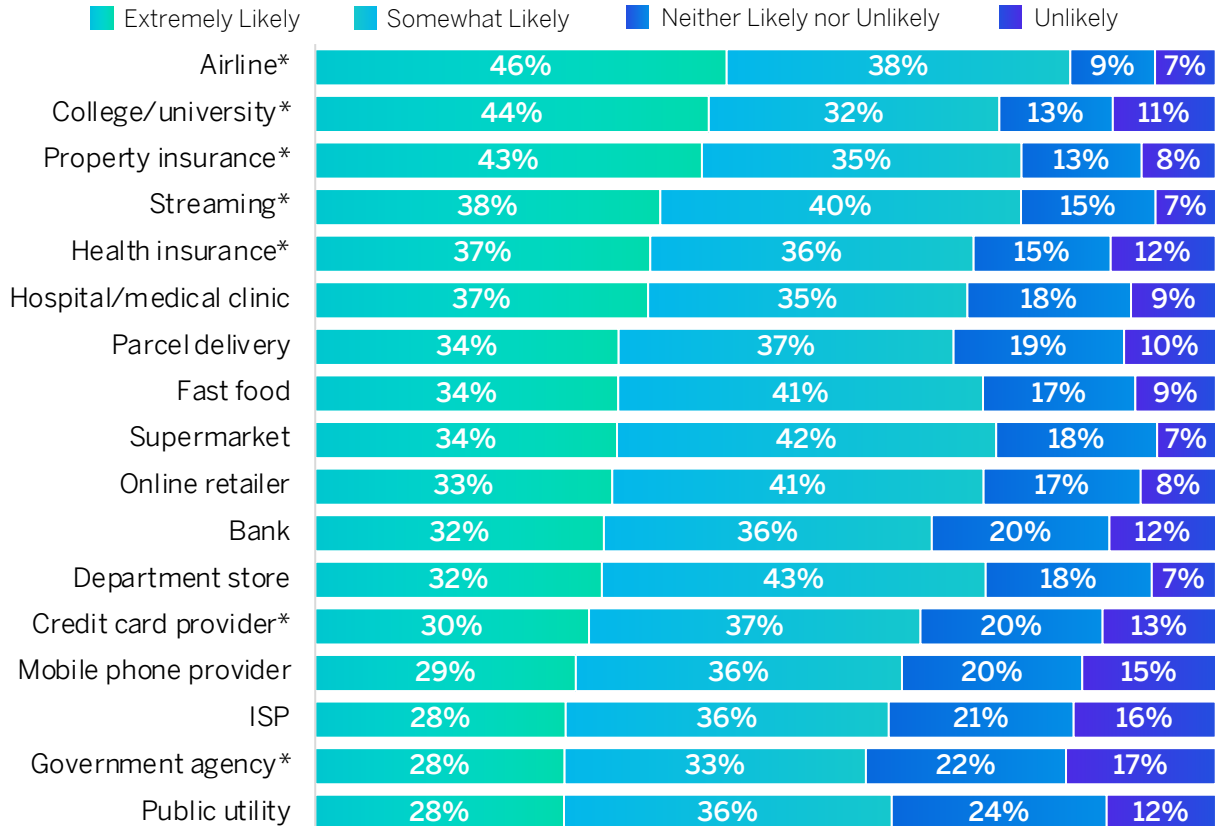
- + Airlines earned the highest average consumer advocacy rating – consumers who said they were “extremely” or “somewhat” likely to recommend – at 84% based on data from two of the 18 countries.
- + Based on data from 12 countries, 17% of customers said they were “unlikely” to recommend government agencies, the highest percentage of any industry.
- + There is an 18 percentage-point gap between the industry with the highest consumer advocacy ratings (airlines) and industry with the lowest consumer advocacy ratings (public utilities).

ABOUT

This chart shows how likely consumers from all countries are to recommend each industry based on their recent experiences. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Advocacy: Average Across All Countries

(Selected “unlikely” to “extremely likely” to recommend)



*Data is from a limited number of countries

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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Consumer Advocacy By Industry (Part 2)

KEY TAKEAWAYS

- + Indian consumers gave the highest advocacy scores in seven industries, while Indonesian consumers gave the highest scores in six industries.
- + Consumers were most likely to recommend health insurers in Thailand (91%), property insurers in Thailand (90%), and department stores in Indonesia (90%).
- + Consumers in Japan gave the lowest advocacy scores in 11 industries. The lowest levels were in public utilities (29%), banks (31%), and ISPs (32%).
- + Mobile phone providers had the largest advocacy gap across countries, with 46 percentage-points separating India and Brazil.

ABOUT

This table shows, for each industry, which country had the highest and lowest levels of consumer advocacy (selected “somewhat” or “very” likely) based on their recent experiences. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to recommend these organizations

(Selected “somewhat” or “extremely” likely to recommend on a scale of 1 -5)

	Country With Highest Advocacy	Country With Lowest Advocacy
Airline*	Indonesia: 85%	India: 83%
Bank	Indonesia: 85%	Japan: 31%
College/university*	Indonesia: 83%	Brazil: 67%
Credit Card Provider*	India: 88%	Japan: 34%
Department store	Indonesia: 90%	Japan: 49%
Fast food restaurant	Philippines: 88%	Japan: 41%
Government agency*	India: 79%	Mexico: 47%
Health Insurer*	Thailand: 91%	Germany: 52%
Hospital or medical clinic	India: 85%	Japan: 42%
Internet service provider	India: 84%	Japan: 32%
Mobile phone provider	India: 84%	Japan: 38%
Online retailer	India: 87%	Japan: 43%
Parcel delivery service	Indonesia: 89%	Japan: 38%
Property Insurer*	Thailand: 90%	South Korea: 53%
Public utility	India: 85%	Japan: 29%
Streaming media service*	Hong Kong: 87%	South Korea: 62%
Supermarket	Indonesia: 88%	Japan: 39%

**Data is from a limited number of countries*

Consumer Advocacy By Industry (Part 3)

KEY TAKEAWAYS

- + Streaming media services have the highest percentage of consumers who are likely to recommend in nine countries, while supermarkets had the highest percentage in four countries.
- + Government agencies have the lowest percentage of consumers who are likely to recommend in eight countries.
- + Mexico had the largest consumer advocacy gap across industries, with 37 percentage-points between supermarkets and government agencies.

Consumers who are likely to recommend these organizations

(Selected “somewhat” or “extremely” likely to recommend on a scale of 1-5)

	Industry With Highest Advocacy	Industry With Lowest Advocacy
Australia	Streaming: 82%	Government agency: 48%
Brazil	Streaming: 85%	Mobile phone provider: 50%
Canada	Supermarket: 76%	Government agency: 47%
France	Streaming: 77%	Mobile phone provider: 56%
Germany	Streaming: 72%	Public utility: 44%
Hong Kong	Streaming: 87%	Parcel delivery service: 71%
India	Credit card provider: 88%	College/university: 78%
Indonesia	Department store: 90%	Government agency: 74%
Japan	Department store: 49%	Public utility: 29%
Malaysia	Supermarket: 83%	Credit card provider: 69%
Mexico	Supermarket: 84%	Government agency: 47%
Philippines	Fast food: 88%	Government agency: 60%
Singapore	Streaming: 81%	Internet service provider: 68%
South Korea	Department store: 75%	Property insurer: 53%
Spain	Fast food: 79%	Public utility: 48%
Thailand	Health insurer: 91%	Government agency: 70%
UK	Supermarket: 79%	Government agency: 48%
U.S.	Online retailer: 79%	Government agency: 60%

ABOUT

This table shows, for each country, which industry had the highest and lowest percentage of consumers who said they were “somewhat” or “very” likely to recommend an organization based on recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumer Advocacy By Industry (Part 4)

KEY TAKEAWAYS

- + Consumers in Japan were the least likely to recommend across all five of these industries.
- + Consumers in Indonesia were the most likely to recommend organizations in three of these industries.
- + Parcel delivery services had the largest range of recommendations, with a 51 percentage-point gap between Indonesia and Japan.

Consumers who are “somewhat” or “very” likely to recommend these organizations (Selected top two boxes on a 5-point scale)

	Department store	Fast food restaurant	Online retailer	Parcel delivery service	Supermarket
Australia	73%	70%	75%	64%	75%
Brazil	75%	79%	76%	81%	77%
Canada	65%	71%	68%	60%	76%
France	71%	64%	70%	67%	75%
Germany	61%	64%	69%	53%	67%
Hong Kong	79%	74%	76%	71%	73%
India	84%	83%	87%	87%	84%
Indonesia	90%	87%	86%	89%	88%
Japan	49%	41%	43%	38%	39%
Malaysia	80%	81%	79%	77%	83%
Mexico	78%	83%	80%	81%	84%
Philippines	84%	88%	79%	79%	85%
Singapore	70%	72%	73%	69%	77%
South Korea	75%	69%	66%	69%	64%
Spain	72%	79%	73%	68%	76%
Thailand	82%	82%	83%	83%	82%
UK	79%	74%	75%	64%	79%
U.S.	74%	76%	79%	74%	77%

ABOUT

This table shows the percentage of respondents from each country who said they were “somewhat” or “very” likely to recommend an organization within an industry based on their recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumer Advocacy By Industry (Part 5)

KEY TAKEAWAYS

- + Only India and Indonesia had enough respondents who had recently interacted with airlines to report on in this study.
- + Consumers in Japan were the least likely to recommend organizations across four of these industries.
- + Consumers in India were the most likely to recommend organizations across three of these industries.
- + Banks had the largest range of recommendations, with 46 percentage-points separating Indonesia and Japan.

ABOUT

This table shows the percentage of respondents from each country who said they were “somewhat” or “very” likely to recommend an organization within an industry based on their recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumers who are “somewhat” or “very” likely to recommend these organizations (Selected top two boxes on a 5-point scale)

	Airline	Bank	Credit card provider	Internet service provider	Mobile phone provider	Streaming media service
Australia	N/A	61%	N/A	64%	65%	82%
Brazil	N/A	67%	63%	63%	50%	85%
Canada	N/A	68%	65%	55%	62%	73%
France	N/A	61%	N/A	58%	56%	77%
Germany	N/A	54%	63%	50%	49%	72%
Hong Kong	N/A	72%	77%	76%	75%	87%
India	83%	84%	88%	84%	84%	87%
Indonesia	85%	85%	79%	80%	81%	84%
Japan	N/A	31%	34%	32%	38%	N/A
Malaysia	N/A	76%	69%	72%	73%	76%
Mexico	N/A	74%	65%	61%	67%	79%
Philippines	N/A	85%	67%	65%	73%	82%
Singapore	N/A	74%	75%	68%	68%	81%
South Korea	N/A	67%	56%	62%	60%	62%
Spain	N/A	49%	54%	61%	53%	70%
Thailand	N/A	82%	83%	78%	78%	87%
UK	N/A	66%	68%	57%	64%	72%
U.S.	N/A	74%	70%	60%	75%	76%

Base: 17,509 consumers across 18 countries
Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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Consumer Advocacy By Industry (Part 6)

KEY TAKEAWAYS

- + There were only enough interactions with property insurers in four countries to report on in this study.
- + Consumers in India were the most likely to recommend organizations in three of these six industries.
- + Public utilities had the largest range of recommendation across these industries, with a 56 percentage-point gap between India and Japan.

Consumers who are “somewhat” or “very” likely to recommend these organizations (Selected top two boxes on a 5-point scale)

N/A Sample size too small 67% Lowest-rated country 91% Highest-rated country

	College or university	Government agency	Health insurer	Hospital or medical clinic	Property insurer	Public utility
Australia	N/A	48%	68%	74%	N/A	58%
Brazil	67%	N/A	61%	69%	N/A	60%
Canada	N/A	47%	N/A	75%	N/A	61%
France	N/A	N/A	61%	73%	N/A	57%
Germany	N/A	N/A	52%	61%	N/A	44%
Hong Kong	N/A	N/A	N/A	75%	N/A	74%
India	78%	79%	87%	85%	83%	85%
Indonesia	83%	74%	80%	76%	88%	85%
Japan	N/A	N/A	N/A	42%	N/A	29%
Malaysia	76%	71%	75%	82%	N/A	77%
Mexico	74%	47%	N/A	76%	N/A	63%
Philippines	78%	60%	85%	78%	N/A	75%
Singapore	N/A	70%	71%	71%	N/A	68%
South Korea	N/A	59%	N/A	68%	53%	64%
Spain	N/A	N/A	N/A	69%	N/A	48%
Thailand	N/A	70%	91%	80%	90%	81%
UK	N/A	48%	N/A	75%	N/A	55%
U.S.	N/A	60%	73%	73%	N/A	69%

ABOUT

This table shows the percentage of respondents from each country who said they were “somewhat” or “very” likely to recommend an organization within an industry based on their recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumer Trust by Industry (Part 1)

KEY TAKEAWAYS

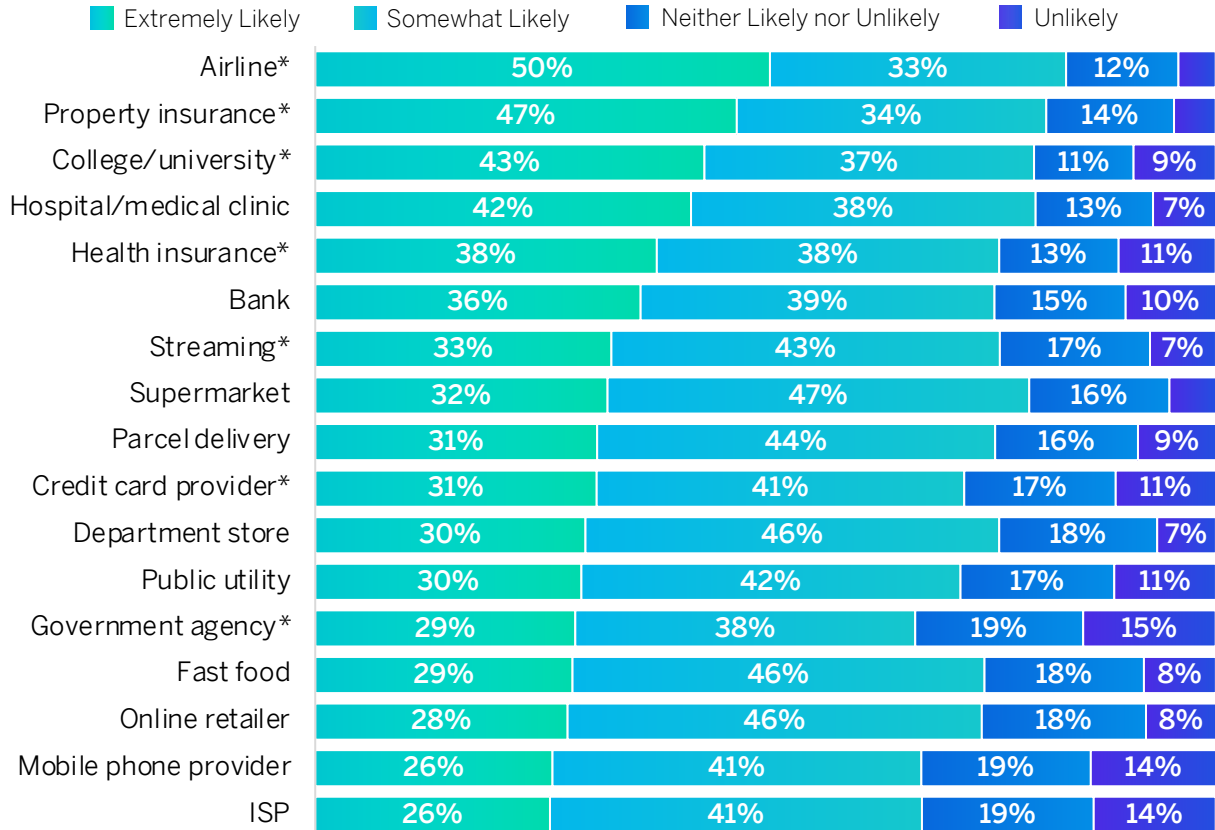
- + Airlines earned the highest average consumer trust rating – consumers who said they were “extremely” or “somewhat” likely to trust – at 83% based on data from two of the 18 countries.
- + Based on data from 12 countries, 15% of customers said they were “unlikely” to trust government agencies, the highest percentage of any industry.
- + There is a 24 percentage-point gap between the industry with the highest consumer trust ratings (airlines) and industry with the lowest consumer trust ratings (internet service providers).

ABOUT

This chart shows how likely consumers from all countries are to trust each industry based on their recent experiences. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Trust: Average Across All Countries

(Selected “unlikely” to “extremely likely” to trust)



*Data is from a limited number of countries

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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Consumer Trust By Industry (Part 2)

KEY TAKEAWAYS

- + Indonesian consumers gave the highest trust scores in nine industries, while Indian consumers gave the highest scores in five industries.
- + Consumers were most likely to trust property insurers in Indonesia (93%) and health insurers in Thailand (91%).
- + Consumers in Japan gave the lowest trust scores in seven industries. The lowest levels were in internet service providers and mobile phone providers (48%).
- + Internet service providers had the largest trust gap across countries, with 47 percentage-points between India and Japan.

ABOUT

This table shows, for each industry, which country had the highest and lowest levels of consumer trust (selected “somewhat” or “very” likely) based on their recent experiences. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who trust these organizations

(Selected “somewhat” or “extremely” likely to trust on a scale of 1 -5)

	Country With Highest Trust	Country With Lowest Trust
Airline*	Indonesia: 84%	India: 83%
Bank	Indonesia: 89%	Spain: 53%
College/university*	Philippines: 86%	Brazil: 68%
Credit Card Provider*	India: 89%	Japan: 57%
Department store	Indonesia: 89%	Germany: 54%
Fast food restaurant	Indonesia: 87%	Japan: 54%
Government agency*	India: 80%	Australia: 56%
Health Insurer*	Thailand: 91%	Germany: 59%
Hospital or medical clinic	Hong Kong: 89%	Japan: 67%
Internet service provider	India: 85%	Japan: 48%
Mobile phone provider	India: 84%	Japan: 48%
Online retailer	Indonesia: 85%	Japan: 53%
Parcel delivery service	Indonesia: 89%	Germany: 57%
Property Insurer*	Indonesia: 93%	South Korea: 58%
Public utility	Indonesia: 89%	Germany: 54%
Streaming*	India: 87%	South Korea: 63%
Supermarket	Indonesia: 88%	Japan: 58%

**Data is from a limited number of countries*

Consumer Trust By Industry (Part 3)

KEY TAKEAWAYS

- + Hospitals/medical clinics have the highest percentage of consumers who are likely to trust them in eight countries.
- + Government agencies have the lowest percentage of consumers who are likely to trust them in eight countries.
- + The largest gap in likelihood to trust across industries is 33 percentage-points in both Brazil (between streaming media services and mobile phone providers) and Mexico (between supermarkets and government agencies).

ABOUT

This table shows, for each country, which industry had the highest and lowest percentage of consumers who said they were “somewhat” or “very” likely to trust an organization based on recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumers who trust these organizations

(Selected “somewhat” or “extremely” likely to trust on a scale of 1 -5)

	Industry With Highest Trust	Industry With Lowest Trust
Australia	Hospital/Medical Clinic: 85%	Government Agency: 56%
Brazil	Streaming: 84%	Mobile Phone Provider: 51%
Canada	Hospital/ Medical Clinic: 86%	Internet Service Provider: 61%
France	Supermarket: 79%	Mobile Phone Provider: 57%
Germany	Hospital/Medical Clinic: 69%	Internet Service Provider: 51%
Hong Kong	Hospital/Medical Clinic: 89%	Fast Food: 72%
India	Credit Card provider: 89%	College/University: 80%
Indonesia	Property Insurance: 93%	Government Agency: 74%
Japan	Hospital/Medical Clinic: 67%	Internet Service Provider: 48%
Malaysia	Hospital/Medical Clinic: 88%	Government Agency: 71%
Mexico	Supermarket: 84%	Government Agency: 51%
Philippines	Bank: 88%	Government Agency: 63%
Singapore	Hospital/Medical Clinic: 84%	Online Retailer: 65%
South Korea	Department Store: 83%	Property Insurance: 58%
Spain	Supermarket: 81%	Bank: 53%
Thailand	Health Insurer: 91%	Government Agency: 72%
UK	Hospital/Medical Clinic: 89%	Government Agency: 62%
U.S.	Online Retailer: 81%	Government Agency: 62%

Consumer Trust By Industry (Part 4)

KEY TAKEAWAYS

- + Consumers in Japan were the least likely to trust organizations in three of these industries.
- + Consumers in Indonesia were the most likely to trust organizations in all five of these industries.
- + Department stores have the largest difference in consumers saying they are likely to trust them, with a 35 percentage-point difference between consumers in Indonesia and Germany.

Consumers who are “somewhat” or “very” likely to trust these organizations

(Selected top two boxes on a 5-point scale)

■ Lowest-rated country
 ■ Highest-rated country

	Department store	Fast food restaurant	Online retailer	Parcel delivery service	Supermarket
Australia	76%	74%	76%	72%	82%
Brazil	74%	73%	71%	79%	78%
Canada	72%	72%	70%	70%	80%
France	73%	67%	74%	73%	79%
Germany	54%	61%	64%	57%	69%
Hong Kong	82%	72%	75%	74%	80%
India	86%	85%	84%	87%	86%
Indonesia	89%	87%	85%	89%	88%
Japan	57%	54%	53%	62%	58%
Malaysia	77%	80%	74%	77%	83%
Mexico	80%	82%	80%	83%	84%
Philippines	86%	84%	72%	81%	86%
Singapore	72%	71%	65%	71%	77%
South Korea	83%	68%	74%	80%	73%
Spain	74%	79%	78%	74%	81%
Thailand	81%	80%	80%	81%	81%
UK	76%	74%	76%	73%	81%
U.S.	74%	74%	81%	76%	80%

ABOUT

This table shows the percentage of respondents from each country who said they were “somewhat” or “very” likely to trust an organization within an industry based on their recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumer Trust By Industry (Part 5)

KEY TAKEAWAYS

- + Only India and Indonesia had enough respondents who had recently interacted with airlines to report on in this study.
- + Consumers in India were the most likely to trust organizations in four of these industries, while consumers from Indonesia were most likely to trust in the other two.
- + Consumers in Japan were the least likely to trust organizations in three of these industries.
- + Internet service providers had the largest range of trust, with 37 percentage-points separating India and Japan.

ABOUT

This table shows the percentage of respondents from each country who said they were “somewhat” or “very” likely to trust an organization within an industry based on their recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumers who are “somewhat” or “very” likely to trust these organizations

(Selected top two boxes on a 5-point scale)

	Airline	Bank	Credit card provider	Internet service provider	Mobile phone provider	Streaming media service
Australia	N/A	72%	N/A	71%	68%	78%
Brazil	N/A	70%	69%	59%	51%	84%
Canada	N/A	75%	78%	61%	67%	69%
France	N/A	67%	N/A	63%	57%	75%
Germany	N/A	64%	58%	51%	53%	65%
Hong Kong	N/A	82%	81%	80%	77%	82%
India	83%	88%	89%	85%	84%	87%
Indonesia	84%	89%	85%	80%	80%	86%
Japan	N/A	54%	57%	48%	48%	N/A
Malaysia	N/A	84%	73%	75%	76%	72%
Mexico	N/A	73%	64%	66%	67%	82%
Philippines	N/A	88%	67%	67%	74%	80%
Singapore	N/A	81%	75%	71%	73%	76%
South Korea	N/A	80%	69%	69%	65%	63%
Spain	N/A	53%	58%	60%	53%	72%
Thailand	N/A	84%	83%	77%	78%	83%
UK	N/A	75%	74%	66%	66%	71%
U.S.	N/A	79%	74%	65%	74%	69%

Base: 17,509 consumers across 18 countries
Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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Consumer Trust By Industry (Part 6)

KEY TAKEAWAYS

- + There were only enough interactions with property insurers in four countries to report on in this study.
- + Property insurers had the largest range of trust across these industries, with a 36 percentage-point difference between India and South Korea.

ABOUT

This table shows the percentage of respondents from each country who said they were “somewhat” or “very” likely to trust an organization within an industry based on their recent experiences. Data is reported only for countries with 100+ respondents reporting an experience with an organization in the industry within the previous 90 days.

Consumers who are “somewhat” or “very” likely to trust these organizations (Selected top two boxes on a 5-point scale)

N/A Sample size too small Lowest-rated country Highest-rated country

	College or university	Government agency	Health insurer	Hospital or medical clinic	Property insurer	Public utility
Australia	N/A	56%	72%	85%	N/A	67%
Brazil	68%	N/A	67%	75%	N/A	66%
Canada	N/A	67%	N/A	86%	N/A	75%
France	N/A	N/A	61%	76%	N/A	67%
Germany	N/A	N/A	67%	69%	N/A	54%
Hong Kong	N/A	N/A	N/A	89%	N/A	86%
India	80%	80%	88%	89%	85%	88%
Indonesia	84%	74%	81%	77%	93%	89%
Japan	N/A	N/A	N/A	67%	N/A	54%
Malaysia	83%	71%	81%	88%	N/A	77%
Mexico	79%	51%	N/A	78%	N/A	63%
Philippines	86%	63%	79%	77%	N/A	78%
Singapore	N/A	80%	74%	84%	N/A	76%
South Korea	N/A	62%	N/A	77%	58%	73%
Spain	N/A	N/A	N/A	73%	N/A	56%
Thailand	N/A	72%	91%	83%	88%	83%
UK	N/A	62%	N/A	89%	N/A	62%
U.S.	N/A	62%	76%	77%	N/A	75%

Base: 17,509 consumers across 18 countries
Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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DATA SOURCE

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the first quarter of 2021. Using an online survey, XM Institute collected data from 17,509 consumers across 18 countries: Australia, Brazil, Canada, France, Germany, Hong Kong, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Singapore, South Korea, Spain, Thailand, UK, and U.S.

XM Institute surveyed 1,000 consumers from each of these countries, except for Hong Kong (556 respondents) and South Korea (952 respondents). To ensure that the data was reflective of country populations, we set quotas for responses to match the gender, age, and income demographics of each country.

DATA CALCULATIONS

In Figures 2, 8, and 14, average country consumer ratings are calculated by taking the average of respondent satisfaction/likelihood percentage rates for each country.

In Figures 3, 4, 5, 6, and 7, country satisfaction rates are calculated by dividing the total number of respondents who selected a 4- or 5-star satisfaction rating on a 5-point scale by the total number of respondents who reported an experience with an organization in the industry in the previous 90 days.

In Figures 9, 10, 11, 12, and 13, advocacy rates are calculated by dividing the total number of respondents who said they were “somewhat likely” or “very likely” to recommend the organization in an industry by the total number of respondents who reported an experience with an organization in the industry in the previous 90 days.

In Figures 15, 16, 17, 18, and 19, trust rates are calculated by dividing the total number of respondents who said they were “somewhat likely” or “very likely” to trust the organization in an industry by the total number of respondents who reported an experience with an organization in the industry in the previous 90 days.

Data for all figures is limited to countries that had 100+ respondents reporting an experience with an industry in the previous 90 days.

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