



DATA SNAPSHOT

Global Study: ROI of Customer Experience

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Global Study: ROI of Customer 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 asked respondents about their consumer experiences across 17 different industries. Some highlights from this study include:

- + **Consumer satisfaction universally impacts key loyalty behaviors.** Satisfaction has a medium or large effect on consumers' likelihood to trust, recommend, and purchase more from an organization across every industry and country. Satisfaction is most highly correlated with trust and recommendations for government agencies.
- + **Consumer satisfaction has the largest effect on their likelihood to recommend.** Compared to an unsatisfying experience, after an extremely satisfying experience, consumers are 4.2x more likely to trust an organization, 5.2x more likely to recommend that organization, and 3.5x more likely to purchase more from the organization.
- + **Satisfaction levels affect loyalty behaviors to different extents across countries.** Regardless of how satisfying an experience was, Indian and Indonesian consumers are most likely to trust, recommend, and repurchase from an organization, while German and Japanese consumers are least likely to do so.

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Methodology (Parts 1 and 2)

ROI: CX Correlates with Trust

KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.80, there is a very high correlation between customer experience (CX) and trust.
- + Thirteen of the 20 data points furthest below the trend line – meaning that the trust levels are lower than would be expected given satisfaction levels – are from Germany or Japan.
- + Fourteen of the 20 data points furthest above the trend line – meaning that the trust levels are higher than would be expected given satisfaction levels – are from India or Indonesia, with 7 each.

ABOUT

This scatterplot contains a data point for each industry in each country.* Each point represents the percentage of consumers from that country who said they were “somewhat” or “very” likely to trust a company in that industry and the percentage of consumers in that country who said they were satisfied (4- or 5-star rating on a 5-star scale) with their recent experience in that industry.

* Industry must have received 100+ responses in that country.

Industry satisfaction rates within each country

correlate with likelihood to **trust** rates

18 countries across 17 industries, 249 data points



Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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ROI: CX Correlates with Recommendations

KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.83, there is a very high correlation between customer experience (CX) and likelihood to recommend.
- + Thirteen of the 20 data points furthest below the trend line – meaning that the recommendation levels are lower than would be expected given their satisfaction levels – are from Germany or Japan.
- + Twelve of the 20 data points furthest above the trend line – meaning that the recommendation levels are higher than would be expected given their satisfaction levels – are from India or Indonesia.

ABOUT

This scatterplot contains a data point for each industry in each country.* Each point represents the percentage of consumers from that country who said they were “somewhat” or “very” likely to recommend a company in that industry and the percentage of consumers in that country who said they were satisfied (4- or 5-star rating on a 5-star scale) with their recent experience in that industry.

* Industry must have received 100+ responses in that country.

Industry satisfaction rates within each country correlate with likelihood to recommend rates

18 countries across 17 industries, 249 data points



Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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ROI: CX Correlates with Purchasing More

KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.66, there is a high correlation between customer experience (CX) and intent to purchase more in the future.
- + Eighteen of the 20 data points furthest below the trend line – meaning that the likelihood to repurchase levels are lower than would be expected given their satisfaction levels – are from Germany or Japan.
- + Twelve of the 20 data points furthest above the trend line – meaning that the likelihood to repurchase levels are higher than would be expected given their satisfaction levels – are from India or Indonesia.

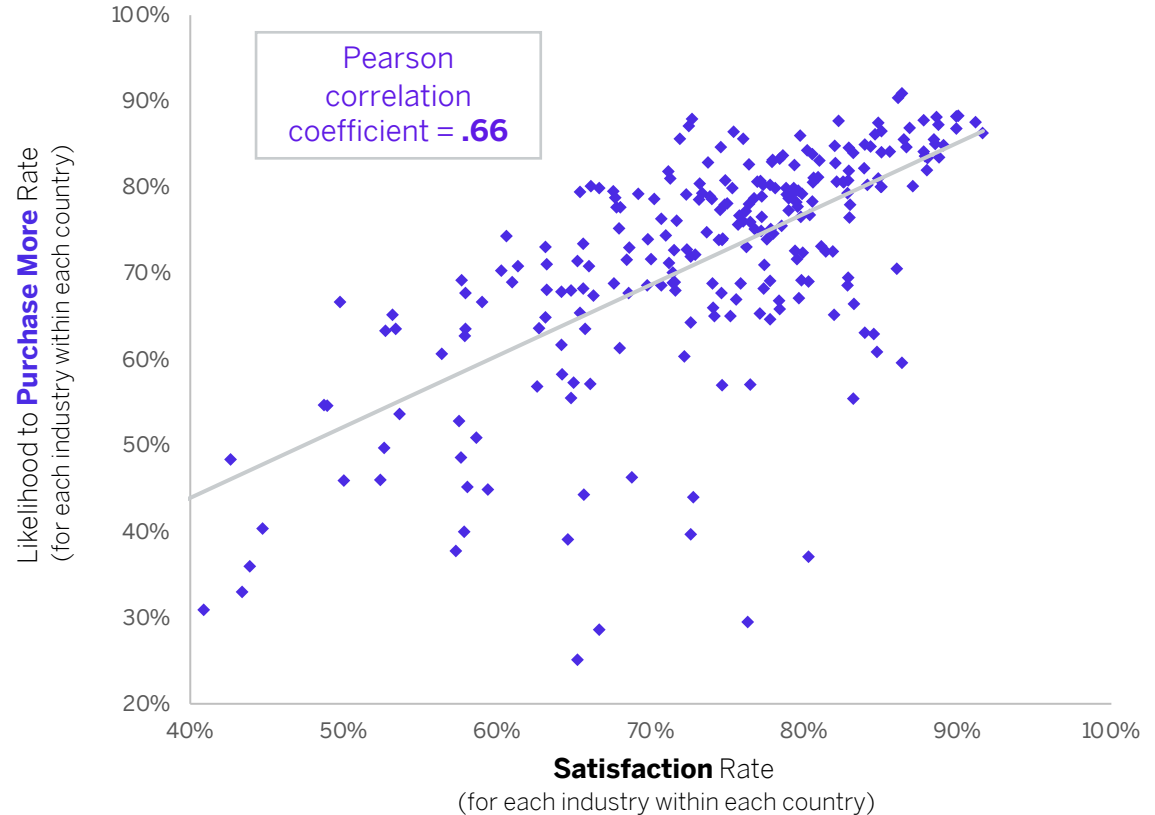
ABOUT

This scatterplot contains a data point for each industry in each country.* Each point represents the percentage of consumers from that country who said they were “somewhat” or “very” likely to repurchase from a company in that industry and the percentage of consumers in that country who said they were satisfied (4- or 5-star rating on a 5-star scale) with their recent experience in that industry.

* Industry must have received 100+ responses in that country.

Industry satisfaction rates within each country correlate with likelihood to purchase more rates

18 countries across 17 industries, 249 data points



Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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CX and Loyalty Correlations – Overall

KEY TAKEAWAYS

- + There is a **69**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **71**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

The top of this chart shows, for all industries across all countries, the correlation between an individual's likelihood to trust, recommend, or purchase more in a given industry and their satisfaction levels with a recent experience in that same industry. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more according to their satisfaction ratings.

Consumer satisfaction ratings correlate with key loyalty behaviors

.54

The correlation between global satisfaction rates and **trust** rates

Large effect

.55

The correlation between global satisfaction rates and **recommend** rates

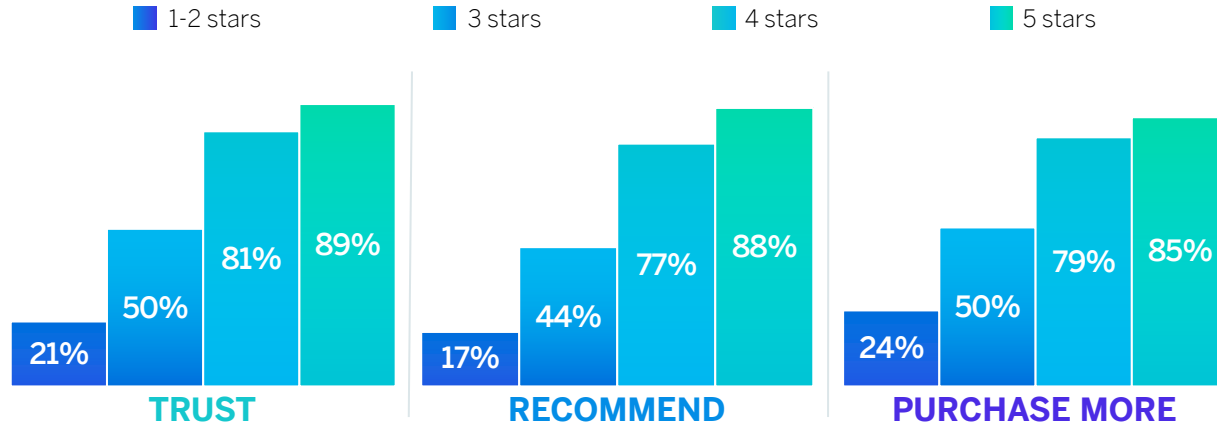
Large effect

.47

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations – by Industry

KEY TAKEAWAYS

- + Across all 17 industries included in this study, consumer satisfaction has a medium or large effect on each of the three loyalty behaviors.
- + Consumer satisfaction is, on average, less strongly correlated with likelihood to purchase more than it is with likelihood to trust or recommend across each of the industries.
- + Likelihood to trust, recommend, and purchase more is most highly correlated with satisfaction for government agencies.
- + Consumer satisfaction and trust are least correlated in the streaming media industry, closely followed by colleges/universities.

ABOUT

This table shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a given industry and their satisfaction levels with a recent experience with an organization in that industry. Likelihood to trust, recommend, and purchase more were assessed on a 5-point scale, from "very unlikely" to "very likely," and satisfaction was assessed on a 1- to 5-star rating scale.

Correlation between consumer satisfaction and consumer loyalty behaviors by industry

No effect (<.1)
 Small effect (.1-.3)
 Medium effect (.3-.5)
 Large effect (>.5)

	TRUST	RECOMMEND	PURCHASE MORE
Airline	0.51	0.51	0.45
Bank	0.56	0.58	0.49
Credit Card Provider	0.56	0.57	0.52
College/university	0.44	0.46	0.41
Department Store	0.47	0.47	0.41
Fast Food	0.48	0.50	0.43
Government Agency	0.63	0.64	0.56*
Health Insurance	0.54	0.58	0.47
Hospital	0.54	0.53	0.43
Internet Service Provider	0.59	0.60	0.54
Mobile Phone Provider	0.59	0.61	0.52
Online Retailer	0.52	0.52	0.47
Parcel Delivery	0.56	0.56	0.49
Property Insurance	0.52	0.56	0.52
Public Utility	0.55	0.55	0.39*
Streaming	0.43	0.47	0.42
Supermarket	0.45	0.46	0.36

* Although Government Agencies and Public Utilities may not have revenue at risk due to bad experiences, there are likely latent loyalty issues that could manifest in other areas.

CX and Trust Correlations – by Industry

KEY TAKEAWAYS

- + Airlines received the highest trust ratings among consumers who gave them a poor (1- or 2-star) satisfaction rating.
- + Hospitals and medical clinics enjoy the highest trust rating from consumers who had a satisfying (4- or 5-star) experience with them.
- + After an unsatisfying experience (1 or 2 stars), consumers are least likely to trust mobile phone providers.
- + Colleges and universities have the lowest rates of trust among consumers who had an extremely satisfying (5-star) experience with them.

ABOUT

This table shows the percentage of consumers who said they are “somewhat” or “very” likely to trust an organization in a given industry based on how they rated their satisfaction with a recent (within 90 days) experience in that industry.

Percentage of consumers ‘somewhat likely’ or ‘very likely’
to **TRUST** based on satisfaction rating

	1-2 stars	3 stars	4 stars	5 stars
Airline	30%	50%	81%	88%
Bank	22%	52%	81%	91%
College/university	22%	56%	82%	84%
Credit card provider	18%	46%	79%	90%
Department store	29%	52%	83%	91%
Fast food	24%	48%	79%	90%
Government agency	19%	48%	83%	89%
Health insurance	18%	48%	83%	89%
Hospital/medical clinic	29%	54%	87%	92%
Internet service provider	16%	50%	78%	89%
Mobile phone provider	15%	47%	78%	88%
Online retailer	19%	43%	78%	88%
Parcel delivery	15%	47%	80%	91%
Property insurance	21%	48%	80%	88%
Public utility	21%	54%	81%	90%
Streaming	21%	48%	78%	88%
Supermarket	30%	54%	83%	91%

CX and Recommendation Correlations – by Industry

KEY TAKEAWAYS

- + Of all the industries, consumers are most likely to recommend airlines after a middling or somewhat satisfying (3- or 4-star) experience.
- + Department stores have the highest recommendation rates among consumers who had an extremely satisfying (5-star) experience with them.
- + After an unsatisfying experience (1 or 2 stars), consumers are least likely to recommend parcel delivery services.

ABOUT

This table shows the percentage of consumers who said they are “somewhat” or “very” likely to recommend an organization in a given industry based on how they rated their satisfaction with a recent (within 90 days) experience in that industry.

Percentage of consumers ‘somewhat likely’ or ‘very likely’ to **RECOMMEND** based on satisfaction rating

Lowest Recommend Rate
 Highest Recommend Rate

	1-2 stars	3 stars	4 stars	5 stars
Airline	25%	52%	81%	88%
Bank	14%	41%	74%	87%
College/university	20%	48%	74%	84%
Credit card provider	15%	38%	74%	87%
Department store	24%	51%	80%	91%
Fast food	26%	47%	80%	90%
Government agency	14%	41%	75%	86%
Health insurance	17%	41%	78%	89%
Hospital/medical clinic	24%	42%	75%	88%
Internet service provider	15%	44%	76%	87%
Mobile phone provider	14%	43%	76%	88%
Online retailer	17%	45%	78%	89%
Parcel delivery	13%	39%	75%	88%
Property insurance	19%	49%	78%	86%
Public utility	17%	43%	73%	85%
Streaming	19%	50%	79%	90%
Supermarket	23%	47%	79%	89%

CX and Repurchase Correlations – by Industry

KEY TAKEAWAYS

- + Of all the industries, consumers are most likely to purchase more from supermarkets following an unsatisfying (1- or 2-star), middling (3-star), or somewhat satisfying (4-star) experience.
- + After an extremely satisfying (5-star) experience, consumers are most likely to purchase more from fast food restaurants.
- + Consumers who have a middling or somewhat satisfying (3- or 4-star) experience are least likely to purchase more from government agencies.
- + After an unsatisfying experience (1 or 2 stars), consumers are least likely to purchase more from credit card providers.

ABOUT

This table shows the percentage of consumers who said they are “somewhat” or “very” likely to purchase more from an organization in a given industry based on how they rated their satisfaction with a recent (within 90 days) experience in that industry.

Percentage of consumers ‘somewhat likely’ or ‘very likely’ to **PURCHASE MORE** based on satisfaction rating

Lowest Repurchase Rate
 Highest Repurchase Rate

	1-2 stars	3 stars	4 stars	5 stars
Airline	29%	54%	79%	88%
Bank	21%	46%	77%	82%
College/university	30%	44%	74%	83%
Credit card provider	17%	45%	75%	84%
Department store	32%	55%	83%	88%
Fast food	33%	56%	83%	89%
Government agency*	19%	39%	73%	82%
Health insurance	25%	43%	74%	83%
Hospital/medical clinic	26%	43%	73%	80%
Internet service provider	20%	50%	78%	87%
Mobile phone provider	18%	48%	76%	84%
Online retailer	25%	52%	83%	87%
Parcel delivery	24%	48%	79%	86%
Property insurance	19%	43%	76%	83%
Public utility*	33%	53%	75%	82%
Streaming	19%	50%	77%	87%
Supermarket	34%	61%	83%	88%

* Although Government Agencies and Public Utilities may not have revenue at risk due to bad experiences, there are likely latent loyalty issues that could manifest in other areas.

CX and Loyalty Correlations: Airlines

KEY TAKEAWAYS

- + There is a **58-point** gap in the likelihood to trust between consumers who gave their recent experience with an airline a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **62-point** gap in the likelihood to recommend between consumers who gave their recent experience with an airline a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.0x** as likely to purchase more from an airline after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from an airline and their satisfaction with a recent experience with that airline. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from an airline according to their satisfaction ratings.

Consumer airline satisfaction ratings correlate with loyalty metric ratings

.51

The correlation between global satisfaction rates and **trust** rates

Large effect

.51

The correlation between global satisfaction rates and **recommend** rates

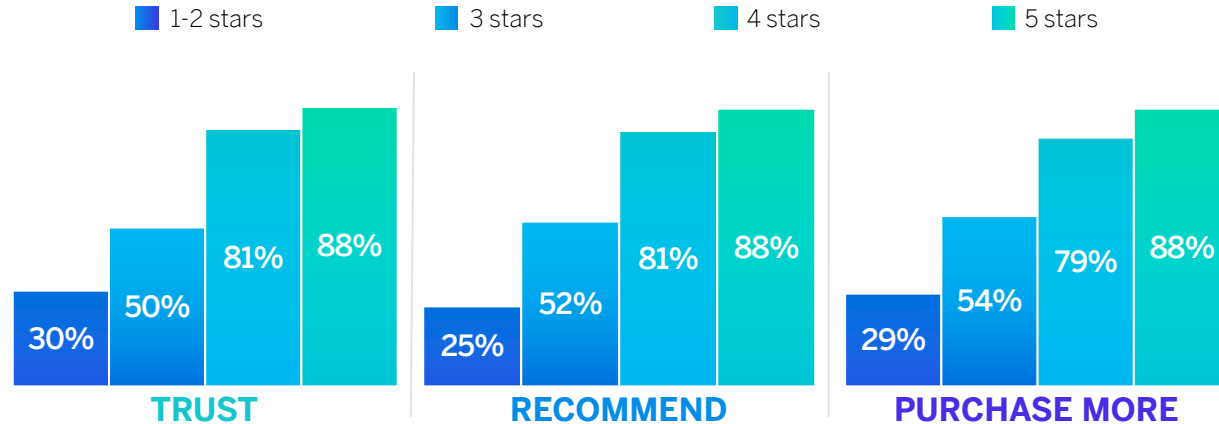
Large effect

.45

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Banking

KEY TAKEAWAYS

- + There is a **68**-point gap in the likelihood to trust between consumers who gave their recent experience with a bank a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **73**-point gap in the likelihood to recommend between consumers who gave their recent experience with a bank a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.9x** as likely to purchase more from a bank after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a bank and their satisfaction with a recent experience with that bank. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a bank according to their satisfaction ratings.

Consumer banking satisfaction ratings correlate with key loyalty behaviors

.56

The correlation between global satisfaction rates and **trust** rates

Large effect

.58

The correlation between global satisfaction rates and **recommend** rates

Large effect

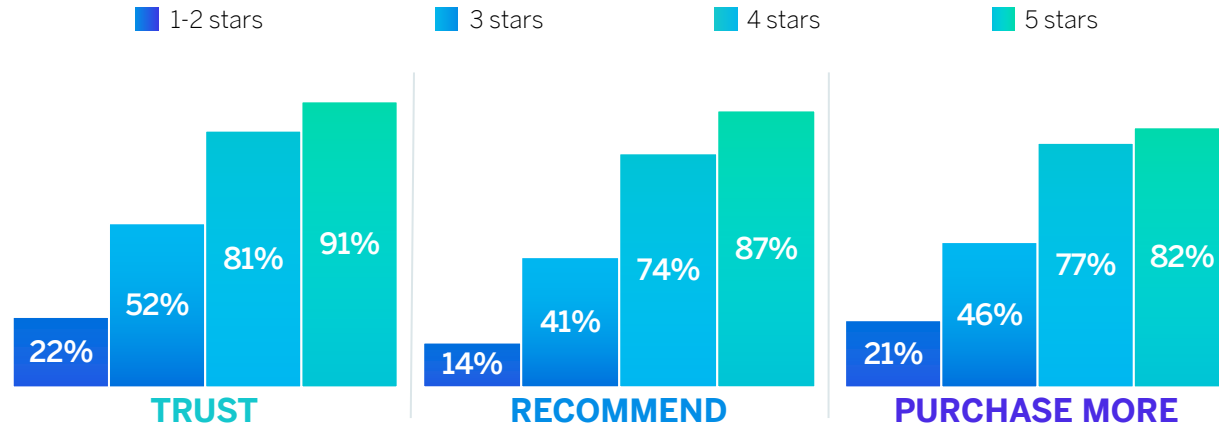
.49

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



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CX and Loyalty Correlations: Colleges/Universities

KEY TAKEAWAYS

- + There is a **62**-point gap in the likelihood to trust between consumers who gave their recent experience with a college/university a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **64**-point gap in the likelihood to recommend between consumers who gave their recent experience with a college/university a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.8x** as likely to purchase more from a college/university after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a college/university and their satisfaction with a recent experience with that college/university. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a college/university according to their satisfaction ratings.

Consumer college/university satisfaction ratings correlate with key loyalty behaviors

.44

The correlation between global satisfaction rates and **trust** rates

Medium effect

.46

The correlation between global satisfaction rates and **recommend** rates

Medium effect

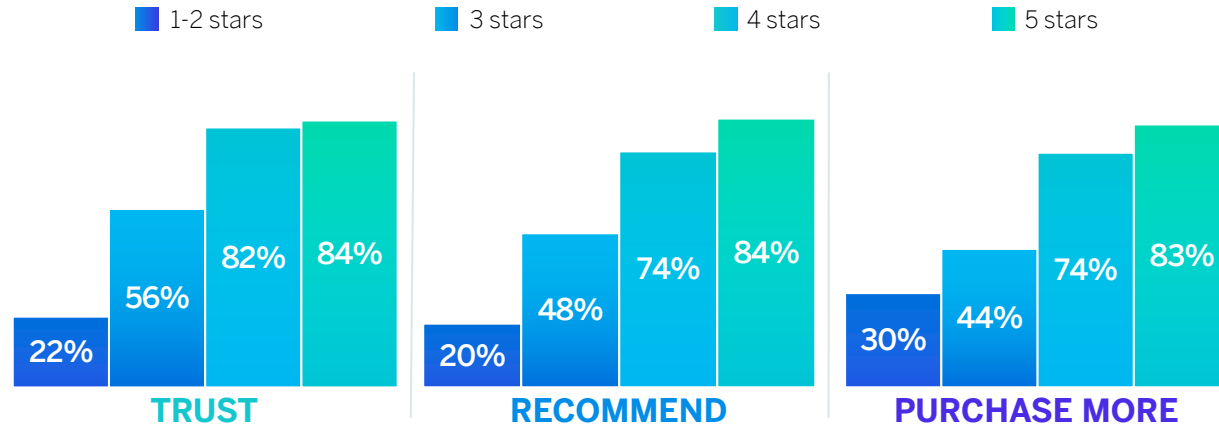
.41

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Credit Card Providers

KEY TAKEAWAYS

- + There is a **72**-point gap in the likelihood to trust between consumers who gave their recent experience with a credit card provider a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **72**-point gap in the likelihood to recommend between consumers who gave their recent experience with a credit card provider a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **4.8x** as likely to purchase more from a credit card provider after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a credit card provider and their satisfaction with a recent experience with that credit card provider. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a credit card provider according to their satisfaction ratings.

Consumer credit card provider satisfaction ratings correlate with key loyalty behaviors

.56

The correlation between global satisfaction rates and **trust** rates

Large effect

.57

The correlation between global satisfaction rates and **recommend** rates

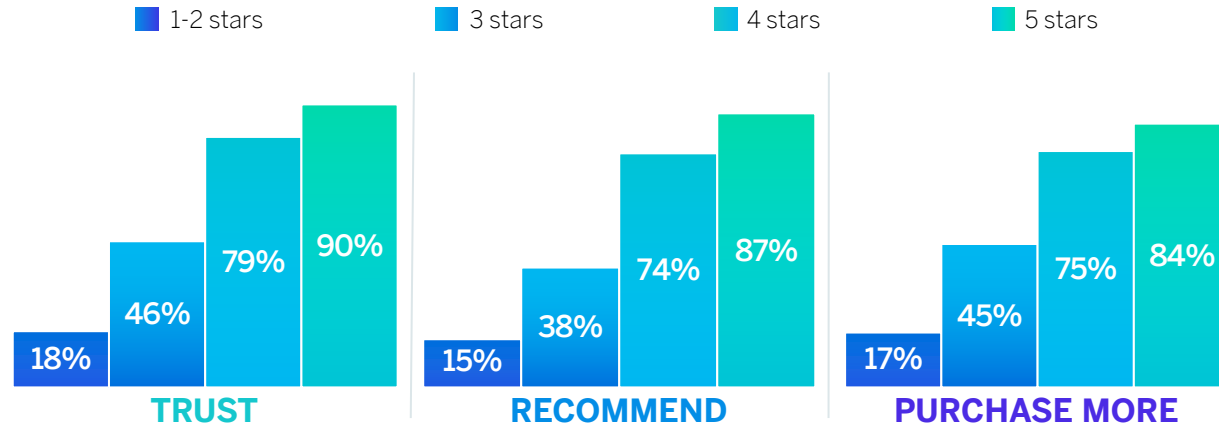
Large effect

.52

The correlation between global satisfaction rates and **purchase more** rates

Large effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



Base: 17,509 consumers across 18 countries
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CX and Loyalty Correlations: Department Stores

KEY TAKEAWAYS

- + There is a **62**-point gap in the likelihood to trust between consumers who gave their recent experience with a department store a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **67**-point gap in the likelihood to recommend between consumers who gave their recent experience with a department store a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.7x** as likely to purchase more from a department store after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a department store and their satisfaction with a recent experience with that department store. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a department store according to their satisfaction ratings.

Consumer department store satisfaction ratings correlate with key loyalty behaviors

.47

The correlation between global satisfaction rates and **trust** rates

Medium effect

.47

The correlation between global satisfaction rates and **recommend** rates

Medium effect

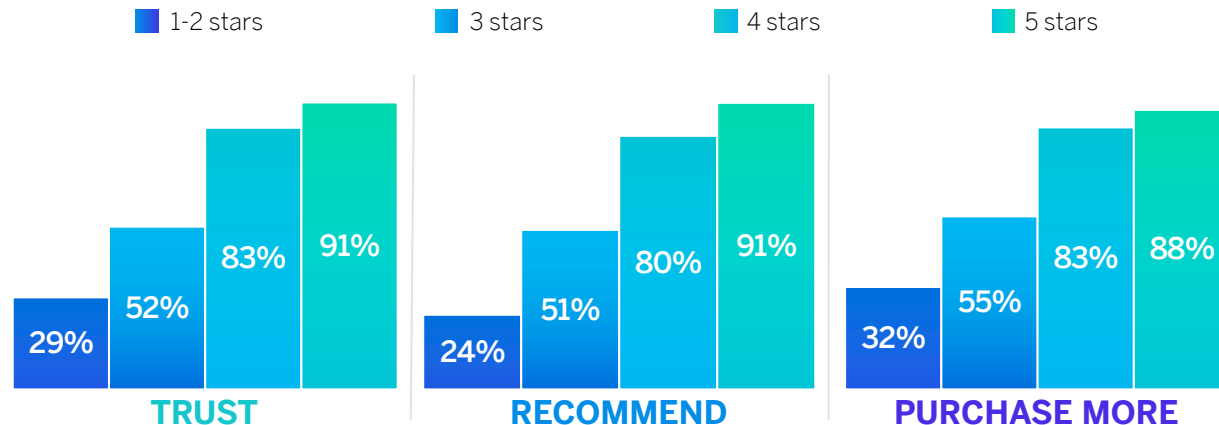
.41

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Fast Food Restaurants

KEY TAKEAWAYS

- + There is a **66**-point gap in the likelihood to trust between consumers who gave their recent experience with a fast food restaurant a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **64**-point gap in the likelihood to recommend between consumers who gave their recent experience with a fast food restaurant a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.7x** as likely to purchase more from a fast food restaurant after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a fast food restaurant and their satisfaction with a recent experience with that fast food restaurant. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a fast food restaurant according to their satisfaction ratings.

Consumer fast food satisfaction ratings correlate with key loyalty behaviors

.48

The correlation between global satisfaction rates and **trust** rates

Medium effect

.50

The correlation between global satisfaction rates and **recommend** rates

Large effect

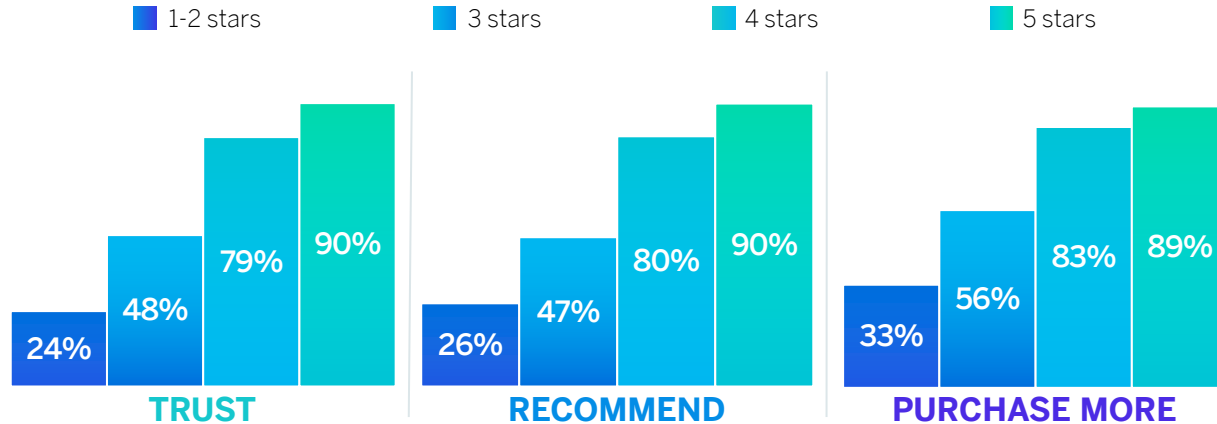
.43

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Government Agencies

KEY TAKEAWAYS

- + There is a **69**-point gap in the likelihood to trust between consumers who gave their recent experience with a government agency a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **72**-point gap in the likelihood to recommend between consumers who gave their recent experience with a government agency a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **4.3x** as likely to purchase more from a government agency after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a government agency and their satisfaction with a recent experience with that government agency. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a government agency according to their satisfaction ratings.

Consumer government agency satisfaction ratings correlate with key loyalty behaviors

.63

The correlation between global satisfaction rates and **trust** rates

Large effect

.64

The correlation between global satisfaction rates and **recommend** rates

Large effect

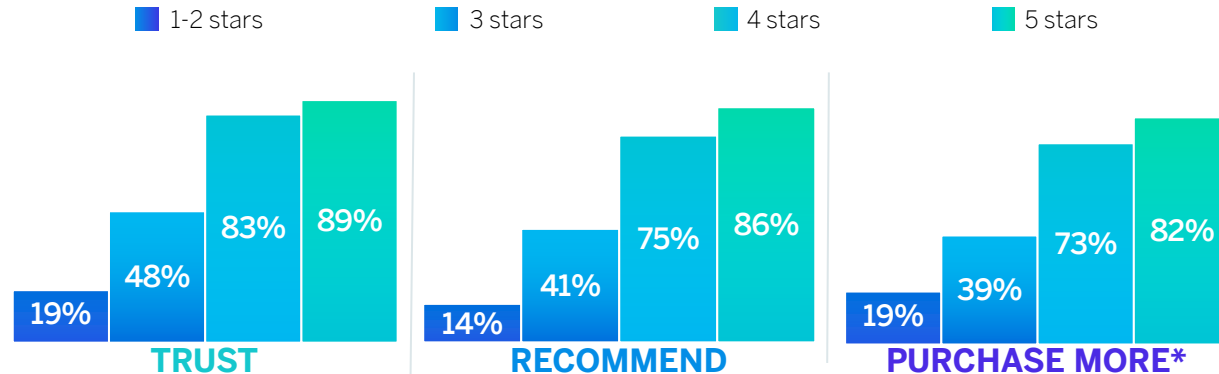
.56

The correlation between global satisfaction rates and **purchase more** rates

Large effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



* Although Public Utilities may not have revenue at risk due to bad experiences, there are likely latent loyalty issues that could manifest in other areas.

CX and Loyalty Correlations: Health Insurers

KEY TAKEAWAYS

- + There is a **71**-point gap in the likelihood to trust between consumers who gave their recent experience with a health insurer a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **72**-point gap in the likelihood to recommend between consumers who gave their recent experience with a health insurer a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.4x** as likely to purchase more from a health insurer after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a health insurer and their satisfaction with a recent experience with that health insurer. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a health insurer according to their satisfaction ratings.

Consumer health insurer satisfaction ratings correlate with key loyalty behaviors

.54

The correlation between global satisfaction rates and **trust** rates

Large effect

.58

The correlation between global satisfaction rates and **recommend** rates

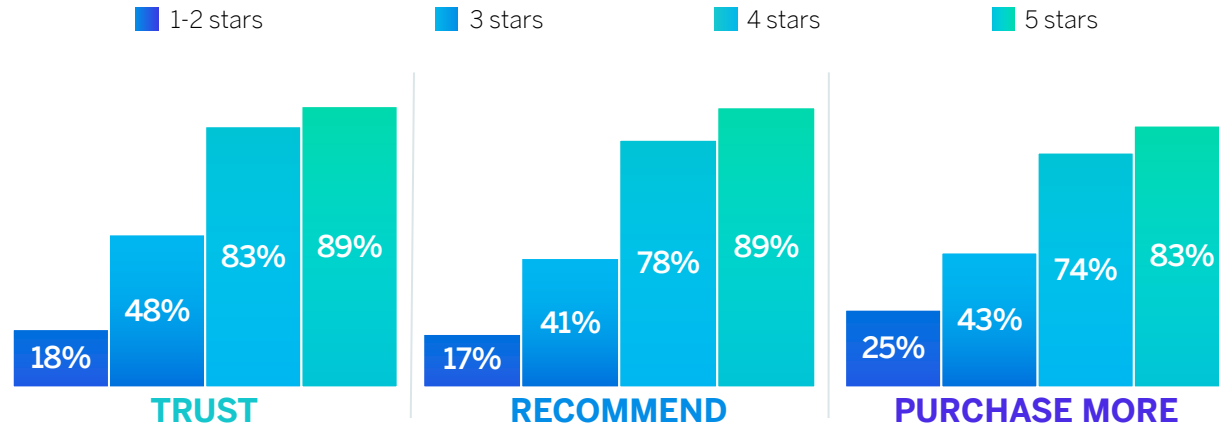
Large effect

.47

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Hospitals/Medical Clinics

KEY TAKEAWAYS

- + There is a **63**-point gap in the likelihood to trust between consumers who gave their recent experience with a hospital/medical clinic a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **65**-point gap in the likelihood to recommend between consumers who gave their recent experience with a hospital/medical clinic a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.1x** as likely to purchase more from a hospital/medical clinic after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a hospital/medical clinic and their satisfaction with a recent experience with that hospital/medical clinic. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a hospital/medical clinic according to their satisfaction ratings.

Consumer hospital/medical clinic satisfaction ratings correlate with key loyalty behaviors

.54

The correlation between global satisfaction rates and **trust** rates

Large effect

.53

The correlation between global satisfaction rates and **recommend** rates

Large effect

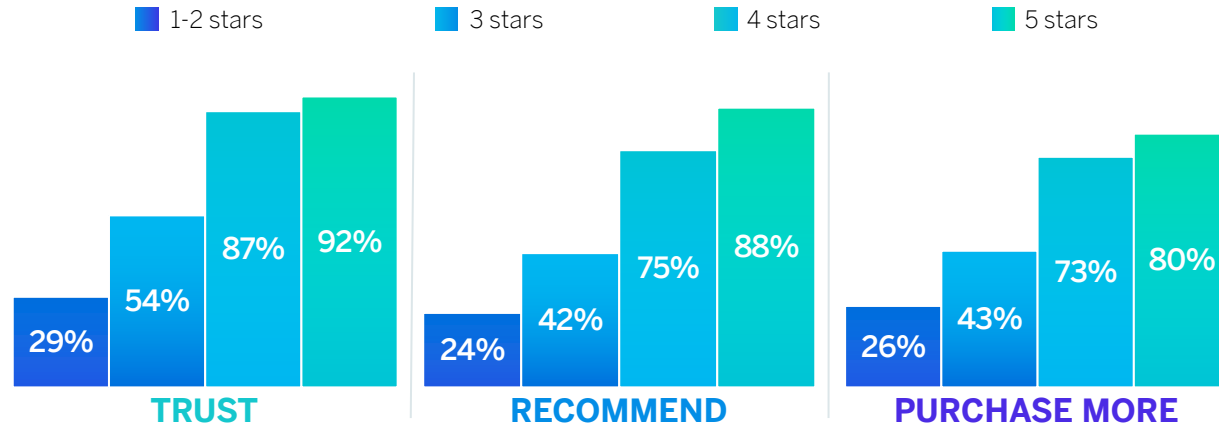
.43

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



CX and Loyalty Correlations: Internet Service Providers

KEY TAKEAWAYS

- + There is a **73**-point gap in the likelihood to trust between consumers who gave their recent experience with an internet service provider a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **73**-point gap in the likelihood to recommend between consumers who gave their recent experience with an internet service provider a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **4.3x** as likely to purchase more from an internet service provider after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from an internet service provider and their satisfaction with a recent experience with that internet service provider. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from an internet service provider according to their satisfaction ratings.

Consumer internet service provider satisfaction ratings correlate with key loyalty behaviors

.59

The correlation between global satisfaction rates and **trust** rates

Large effect

.60

The correlation between global satisfaction rates and **recommend** rates

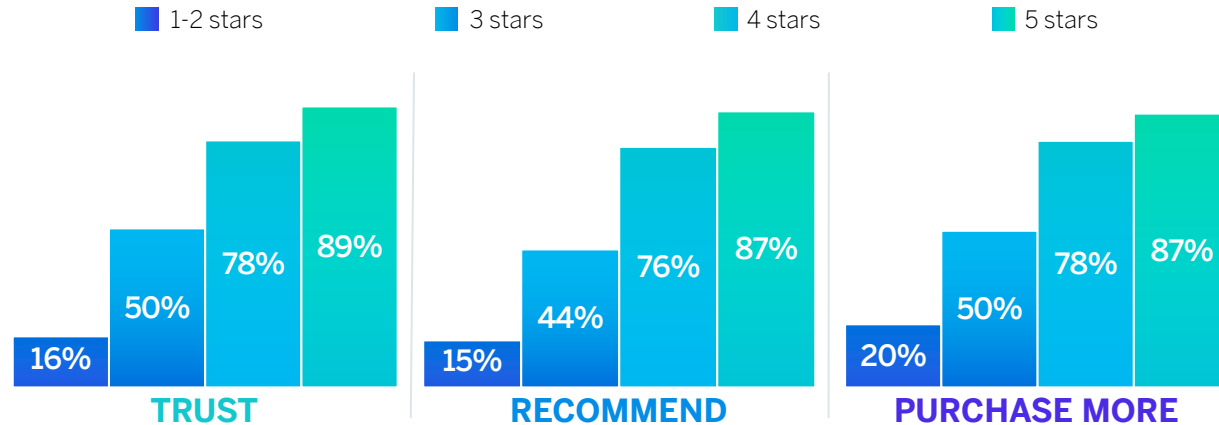
Large effect

.54

The correlation between global satisfaction rates and **purchase more** rates

Strong effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Mobile Phone Providers

KEY TAKEAWAYS

- + There is a **73**-point gap in the likelihood to trust between consumers who gave their recent experience with a mobile phone provider a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **74**-point gap in the likelihood to recommend between consumers who gave their recent experience with a mobile phone provider a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **4.6x** as likely to purchase more from a mobile phone provider after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a mobile phone provider and their satisfaction with a recent experience with that mobile phone provider. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a mobile phone provider according to their satisfaction ratings.

Consumer mobile phone provider satisfaction ratings correlate with key loyalty behaviors

.59

The correlation between global satisfaction rates and **trust** rates

Large effect

.61

The correlation between global satisfaction rates and **recommend** rates

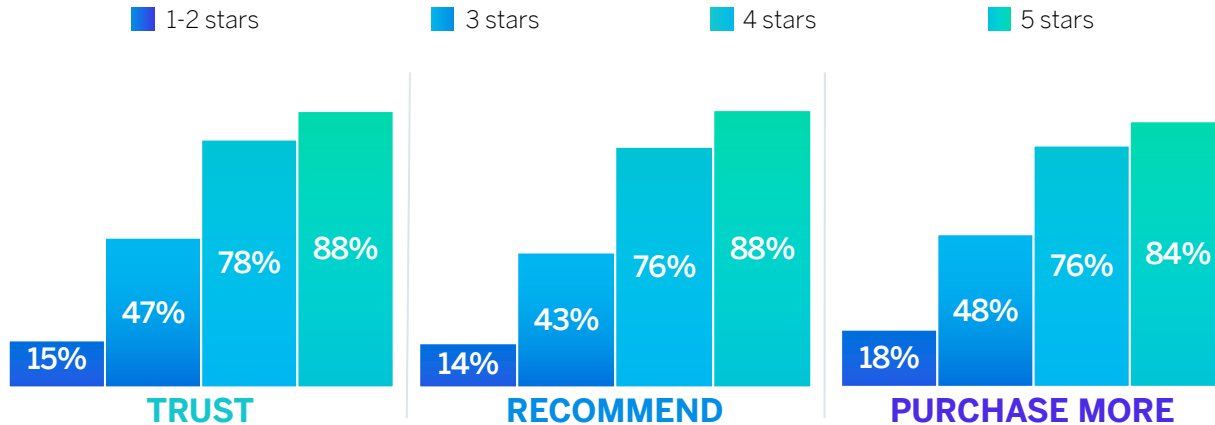
Large effect

.52

The correlation between global satisfaction rates and **purchase more** rates

Large effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Online Retailers

KEY TAKEAWAYS

- + There is a **69**-point gap in the likelihood to trust between consumers who gave their recent experience with an online retailer a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **72**-point gap in the likelihood to recommend between consumers who gave their recent experience with an online retailer a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.5x** as likely to purchase more from an online retailer after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from an online retailer and their satisfaction with a recent experience with that online retailer. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from an online retailer according to their satisfaction ratings.

Consumer online retailer satisfaction ratings correlate with key loyalty behaviors

.52

The correlation between global satisfaction rates and **trust** rates

Large effect

.52

The correlation between global satisfaction rates and **recommend** rates

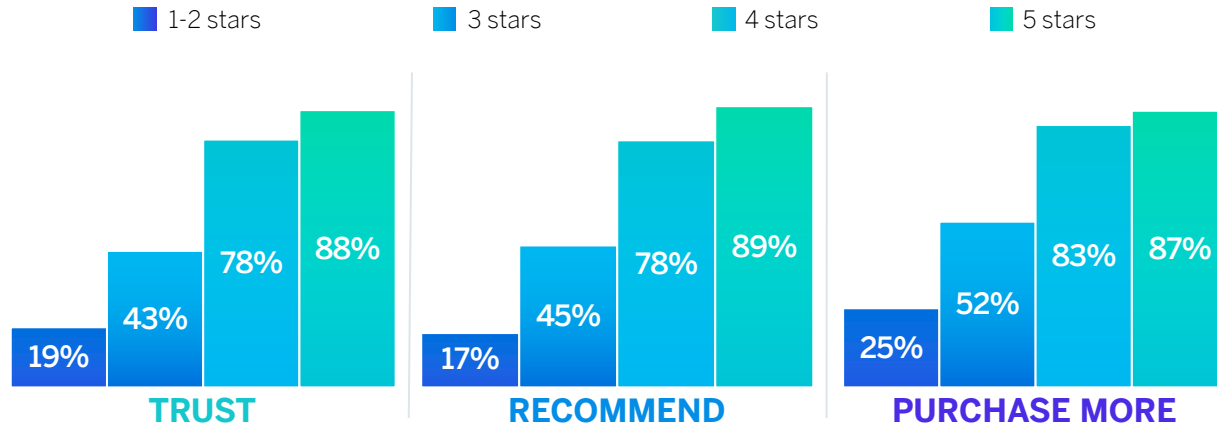
Large effect

.47

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Parcel Delivery Services

KEY TAKEAWAYS

- + There is a **76**-point gap in the likelihood to trust between consumers who gave their recent experience with a parcel delivery service a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **75**-point gap in the likelihood to recommend between consumers who gave their recent experience with a parcel delivery service a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.7x** as likely to purchase more from a parcel delivery service after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a parcel delivery service and their satisfaction with a recent experience with that parcel delivery service. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a parcel delivery service according to their satisfaction ratings.

Consumer parcel delivery service satisfaction ratings correlate with key loyalty behaviors

.56

The correlation between global satisfaction rates and **trust** rates

Large effect

.56

The correlation between global satisfaction rates and **recommend** rates

Large effect

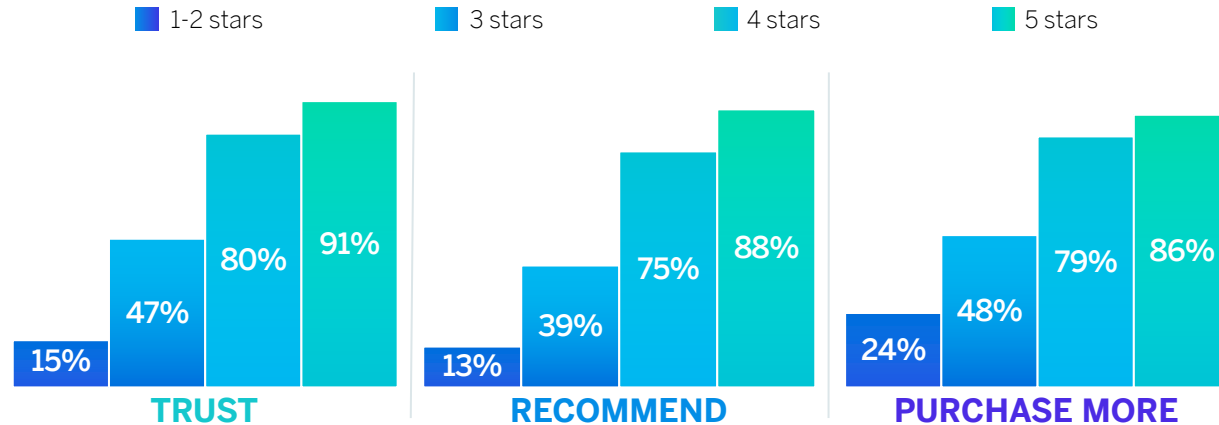
.49

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



CX and Loyalty Correlations: Property Insurers

KEY TAKEAWAYS

- + There is a **67**-point gap in the likelihood to trust between consumers who gave their recent experience with a property insurer a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **67**-point gap in the likelihood to recommend between consumers who gave their recent experience with a property insurer a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **4.5x** as likely to purchase more from a property insurer after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a property insurer and their satisfaction with a recent experience with that property insurer. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a property insurer according to their satisfaction ratings.

Consumer property insurer satisfaction ratings correlate with key loyalty behaviors

.52

The correlation between global satisfaction rates and **trust** rates

Large effect

.56

The correlation between global satisfaction rates and **recommend** rates

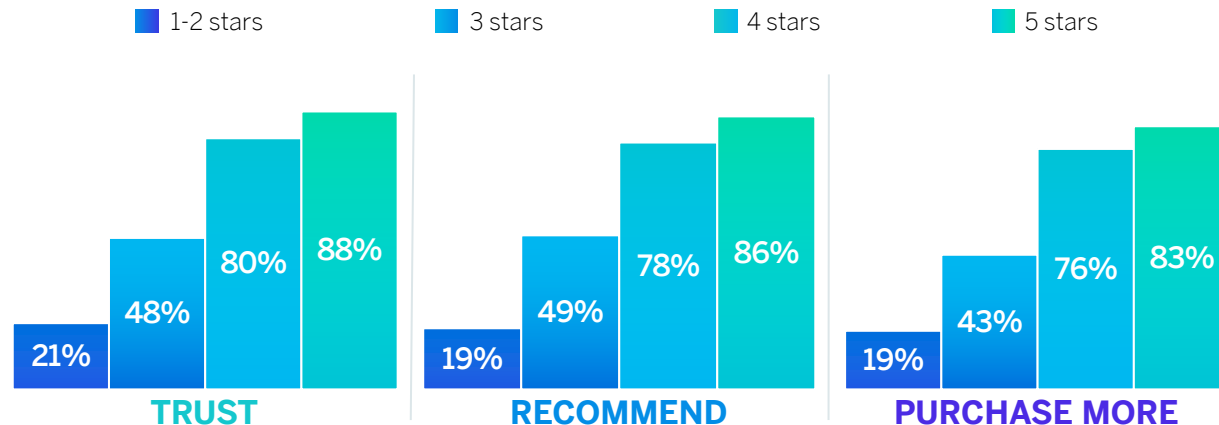
Large effect

.52

The correlation between global satisfaction rates and **purchase more** rates

Large effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Public Utilities

KEY TAKEAWAYS

- + There is a **68**-point gap in the likelihood to trust between consumers who gave their recent experience with a public utility a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **68**-point gap in the likelihood to recommend between consumers who gave their recent experience with a public utility a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a public utility after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a public utility and their satisfaction with a recent experience with that public utility. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a public utility according to their satisfaction ratings.

Consumer public utilities satisfaction ratings correlate with key loyalty behaviors

.55

The correlation between global satisfaction rates and **trust** rates

Large effect

.55

The correlation between global satisfaction rates and **recommend** rates

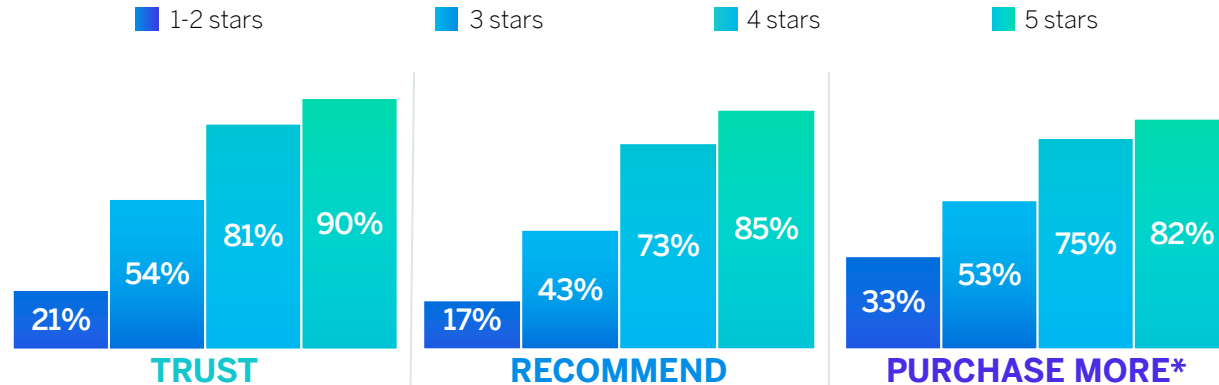
Large effect

.39

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



* Although Public Utilities may not have revenue at risk due to bad experiences, there are likely latent loyalty issues that could manifest in other areas.

CX and Loyalty Correlations: Streaming Media

KEY TAKEAWAYS

- + There is a **66**-point gap in the likelihood to trust between consumers who gave their recent experience with a streaming media company a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **71**-point gap in the likelihood to recommend between consumers who gave their recent experience with a streaming media company a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **4.5x** as likely to purchase more from a streaming media company after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a streaming media platform and their satisfaction with a recent experience with that streaming media platform. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a streaming media platform according to their satisfaction ratings.

Consumer streaming satisfaction ratings correlate with key loyalty behaviors

.43

The correlation between global satisfaction rates and **trust** rates

Medium effect

.47

The correlation between global satisfaction rates and **recommend** rates

Medium effect

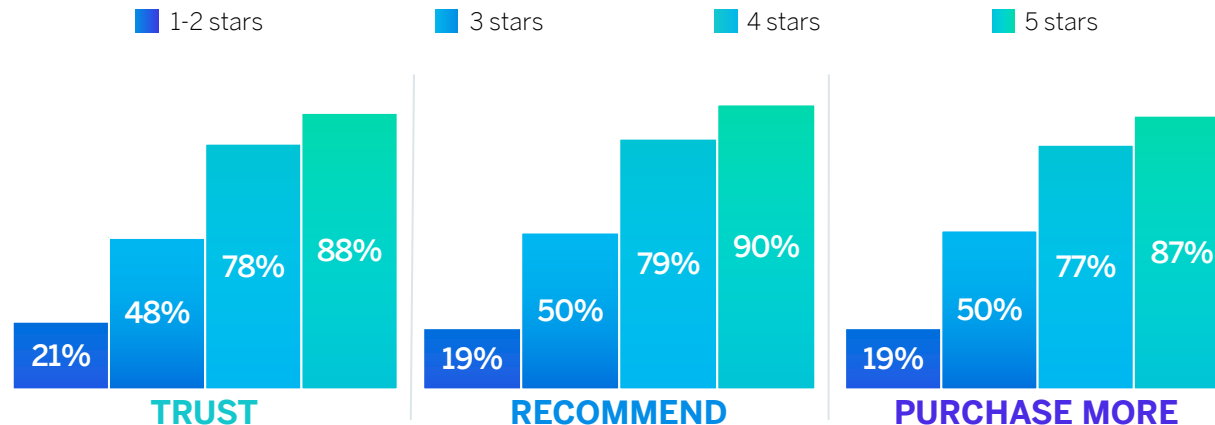
.42

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to:

(out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations: Supermarkets

KEY TAKEAWAYS

- + There is a **61**-point gap in the likelihood to trust between consumers who gave their recent experience with a supermarket a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **66**-point gap in the likelihood to recommend between consumers who gave their recent experience with a supermarket a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.6x** as likely to purchase more from a supermarket after a 5-star experience than they are after a 1- or 2-star experience.

ABOUT

The top of this chart shows the correlation between an individual's likelihood to trust, recommend, or purchase more from a supermarket and their satisfaction with a recent experience with that supermarket. The bottom of this chart shows the percentage of consumers who said they are "somewhat" or "very" likely to trust, recommend, or purchase more from a supermarket according to their satisfaction ratings.

Consumer supermarket satisfaction ratings correlate with key loyalty behaviors

.45

The correlation between global satisfaction rates and **trust** rates

Medium effect

.46

The correlation between global satisfaction rates and **recommend** rates

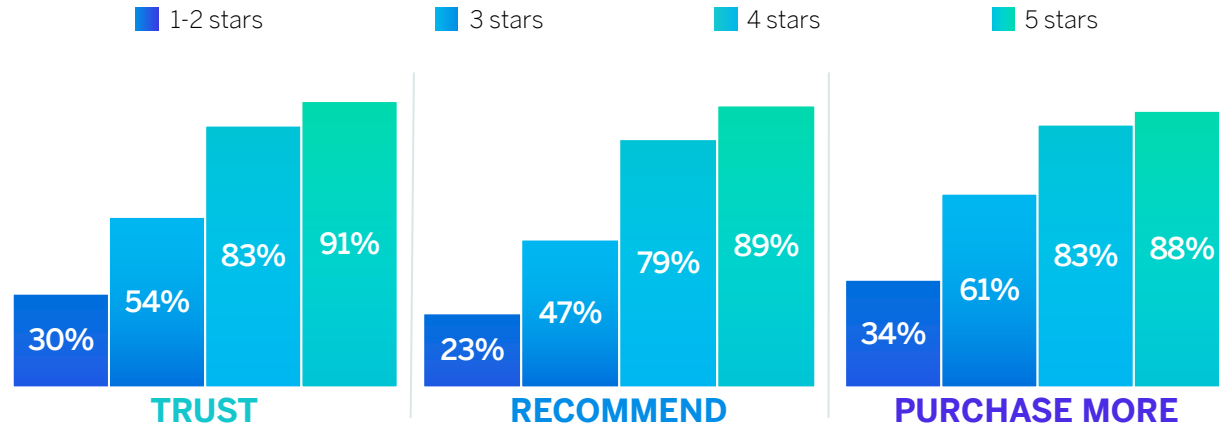
Medium effect

.36

The correlation between global satisfaction rates and **purchase more** rates

Medium effect

Consumers who say they are "somewhat" or "very" likely to: (out of 1- to 5-star satisfaction ratings)



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

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CX and Loyalty Correlations – by Country

KEY TAKEAWAYS

- + In each of the 18 countries included in this study, consumer satisfaction has either a medium or large effect on the three loyalty behaviors.
- + India has the lowest correlation between how satisfied consumers are and how likely they are to trust, recommend, or purchase more from a company.
- + Consumer satisfaction is most strongly correlated with likelihood to both trust and recommend in Spain.
- + Across all countries, consumer satisfaction is, on average, less strongly correlated with likelihood to purchase more than it is with likelihood to trust or recommend.

ABOUT

This table shows, for each country, the correlation between consumers' likelihood to trust, recommend, or purchase more from a given industry (assessed on a 5-point scale from "very unlikely" to "very likely") and their satisfaction levels with their recent experience in that industry (assessed on a 1- to 5-star rating scale). Data for each country includes consumers' ratings for all 17 industries.

Correlation between consumer satisfaction and consumer loyalty behaviors by country

No effect (<.1)
 Small effect (.1-.3)
 Medium effect (.3-.5)
 Large effect (>.5)

	TRUST	RECOMMEND	PURCHASE MORE
Australia	0.58	0.58	0.48
Brazil	0.55	0.59	0.47
Canada	0.56	0.56	0.45
France	0.59	0.59	0.54
Germany	0.54	0.57	0.41
Hong Kong	0.52	0.53	0.42
India	0.36	0.36	0.37
Indonesia	0.49	0.51	0.46
Japan	0.54	0.49	0.46
Malaysia	0.46	0.48	0.46
Mexico	0.51	0.54	0.41
Philippines	0.53	0.55	0.49
Singapore	0.54	0.55	0.54
South Korea	0.49	0.53	0.47
Spain	0.64	0.63	0.54
Thailand	0.47	0.51	0.42
UK	0.56	0.56	0.47
U.S.	0.49	0.49	0.41

CX and Trust Correlations – by Country

KEY TAKEAWAYS

- + German and Spanish consumers are the least likely to trust an organization after an unsatisfying experience (1 or 2 stars).
- + Indonesian consumers are the most likely to trust an organization after an extremely satisfying, 5-star experience.
- + Consumers in Spain and Australia have the largest gap between how likely they are to trust an organization after an unsatisfying (1- or 2-star) experience and how likely they are to trust an organization after an extremely satisfying (5-star) experience.
- + Indian and Malaysian consumers have the smallest difference in trust between 1- or 2-star experiences and 5-star experiences.

ABOUT

This table shows, for each country, the percentage of responses from consumers who said they were “somewhat” or “very” likely to trust an organization in a given industry based on how they rated their satisfaction with a recent (within 90 days) experience in that industry. The final column shows the percentage-point gap between how likely consumers are to trust an organization after a 1- or 2-star experience compared to after a 5-star experience.

Percentage of consumers ‘somewhat likely’ or ‘very likely’ to **TRUST** based on satisfaction rating

 Two Lowest Trust Gaps  Two Highest Trust Gaps

	1-2 stars	3 stars	4 stars	5 stars	5 stars minus 1-2 stars
Australia	17%	48%	81%	90%	73
Brazil	21%	56%	80%	87%	66
Canada	21%	47%	77%	89%	69
France	17%	53%	80%	89%	71
Germany	12%	32%	62%	81%	70
Hong Kong	22%	57%	88%	93%	71
India	43%	66%	88%	91%	48
Indonesia	29%	58%	88%	94%	65
Japan	13%	40%	74%	81%	68
Malaysia	32%	54%	84%	91%	58
Mexico	21%	51%	84%	90%	69
Philippines	31%	57%	86%	93%	62
Singapore	23%	49%	81%	92%	69
South Korea	24%	51%	85%	87%	63
Spain	12%	42%	77%	89%	77
Thailand	22%	54%	84%	93%	71
UK	18%	47%	76%	88%	70
U.S.	23%	46%	77%	88%	65

CX and Recommendation Correlations – by Country

KEY TAKEAWAYS

- + Japanese consumers are the least likely to recommend an organization, no matter how satisfying their experience was.
- + Indonesian consumers are most likely to recommend an organization after having an either somewhat or extremely satisfying experience (4 or 5 stars).
- + Consumers in Spain and Hong Kong have the largest gap between how likely they are to recommend an organization after 1- or 2-star experience versus after a 5-star experience.
- + Indian and Japanese consumers have the smallest gap in likelihood to recommend after a 1- or 2-star experience or a 5-star experience.

ABOUT

This table shows, for each country, the percentage of responses from consumers who said they were “somewhat” or “very” likely to recommend an organization in a given industry based on how they rated their satisfaction with a recent (within 90 days) experience in that industry. The final column shows the percentage-point gap between how likely consumers are to recommend an organization after a 1- or 2-star experience compared to after a 5-star experience.

Percentage of consumers ‘somewhat likely’ or ‘very likely’ to **RECOMMEND** based on satisfaction rating

 Two Lowest Recommendation Gaps  Two Highest Recommendation Gaps

	1-2 stars	3 stars	4 stars	5 stars	5 stars minus 1-2 stars
Australia	13%	39%	74%	86%	74
Brazil	20%	53%	79%	89%	69
Canada	14%	41%	72%	83%	70
France	16%	45%	75%	87%	72
Germany	10%	26%	59%	81%	72
Hong Kong	17%	48%	84%	93%	76
India	34%	65%	86%	90%	56
Indonesia	28%	53%	88%	94%	65
Japan	9%	21%	51%	69%	59
Malaysia	25%	54%	83%	89%	64
Mexico	18%	50%	81%	89%	71
Philippines	28%	57%	86%	94%	66
Singapore	19%	45%	78%	92%	73
South Korea	17%	40%	75%	85%	68
Spain	10%	39%	71%	87%	76
Thailand	19%	53%	84%	94%	75
UK	12%	39%	71%	86%	74
U.S.	23%	45%	74%	86%	63

CX and Repurchase Correlations – by Industry

KEY TAKEAWAYS

- + Japanese consumers are least likely to purchase more from an organization after an unsatisfying experience (1 or 2 stars).
- + Indonesian consumers are most likely to buy more from an organization after an extremely satisfying experience (5 stars).
- + Malaysian and Thai consumers have the largest difference in how likely they are to purchase more after a 1- or 2-star experience versus after a 5-star experience.
- + German and Indian consumers have the smallest gap in likelihood to purchase more after 1- or 2-star experience versus after a 5-star experience.

Percentage of consumers ‘somewhat likely’ or ‘very likely’ to **PURCHASE MORE** based on satisfaction rating

 Two Lowest Repurchasing Gaps

 Two Highest Repurchasing Gaps

	1-2 stars	3 stars	4 stars	5 stars	5 stars minus 1-2 stars
Australia	27%	51%	77%	85%	58
Brazil	30%	63%	82%	88%	58
Canada	23%	49%	74%	80%	57
France	25%	61%	85%	89%	64
Germany	12%	29%	50%	57%	45
Hong Kong	32%	64%	88%	92%	60
India	43%	64%	87%	91%	48
Indonesia	30%	52%	88%	93%	62
Japan	10%	27%	54%	65%	55
Malaysia	22%	51%	84%	89%	67
Mexico	29%	58%	81%	88%	59
Philippines	30%	59%	86%	92%	62
Singapore	24%	48%	80%	92%	68
South Korea	26%	54%	88%	87%	60
Spain	17%	46%	76%	85%	68
Thailand	18%	50%	83%	90%	72
UK	23%	46%	75%	80%	58
U.S.	29%	51%	75%	84%	55

ABOUT

This table shows, for each country, the percentage of responses from consumers who said they were “somewhat” or “very” likely to repurchase from an organization in a given industry based on how they rated their satisfaction with a recent (within 90 days) experience in that industry. The final column shows the percentage-point gap between how likely consumers are to purchase more from an organization after a 1- or 2-star experience compared to after a 5-star experience.

Methodology (Part 1)

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 the countries, except for Hong Kong (556 respondents) and South Korea (952 respondents). To ensure that the data was reflective of the population within those countries, we set quotas for responses to match the gender, age, and income demographics of each country.

DATA CALCULATIONS

In Figures **1**, **2**, and **3**, we calculated data points by taking, for each industry in each country, the average percentage of consumers who gave a 4- or 5-star satisfaction rating to an organization in that industry (satisfaction rate) and the average percentage of consumers who said they were “somewhat” or “very” likely to trust, recommend, or purchase more from that organization (likelihood to trust, recommend, and purchase more rate). We only included industries where 100+ respondents said they had an experience in that industry in the previous 90 days. We calculated Pearson correlation coefficients by correlating the satisfaction rate averages with trust, recommend, and purchase more rate averages.

In Figure **4**, we calculated the correlation numbers at the top of the page by taking each individual consumer’s likelihood to trust, recommend, or purchase more from an organization in a given industry and correlating that rate to their satisfaction levels with a recent experience in that same industry. To perform this correlation, we translated their likelihood to trust, recommend, and purchase more response – which fell on a scale from “very unlikely” to “very likely” – into a numeric score from 1 to 5. So, a response of “very unlikely” became a “1,” “somewhat likely” became a “4,” and so on. We call this the *translated likelihood scale*.

We calculated the charts at the bottom of the page by first, for each of the three loyalty behaviors, totaling the number of responses (consumers could evaluate more than one industry) across all industries and countries where consumers said they were either “somewhat” or “very” likely to trust, recommend, or purchase more from an organization. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars. We identified key takeaways using the same methodology as Figures 9 through 25 (see next page).

Methodology (Part 2)

DATA CALCULATIONS (cont.)

In Figure **5**, we calculated the correlation numbers in each column by taking each global consumer's likelihood to trust, recommend, or purchase more from an organization that particular industry and correlating that rate to their satisfaction levels with a recent experience in that same industry. We used the translated likelihood rate for each of these three loyalty behaviors to perform this calculation. A large effect means there is a strong correlation between the two metrics, a medium effect means there is a moderate correlation, a small effect means there is a weak correlation, and and no effect means there is a very trivial or not a correlation.

In Figures **6**, **7**, and **8**, we calculated the percentages by first, for each of the three loyalty behaviors, totaling the number of global responses (consumers could evaluate more than one industry) where consumers said they were either "somewhat" or "very" likely to trust, recommend, or purchase more from an organization in each industry. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars. This gave us the percentages of global consumers who said they would likely trust, recommend, or purchase more in each industry based on their satisfaction levels.

In Figures **9** through **25**, the correlation numbers at the top of the page comes from the data on Figure 5. The charts at the bottom of the page come from the data on trust, recommendations, and repurchasing from Figures 6, 7, and 8 respectively. To calculate the key takeaways for trust and recommend, we subtracted the percentage of consumers who gave a 1- or 2-star satisfaction score from the percentage who gave a 5-star score. To calculate the key takeaway for purchasing more, we divided the percentage of consumers who gave a 5-star satisfaction rating by the percentage who gave a 1- or 2-star rating.

In Figure **26**, we calculated the correlation numbers for each country by taking each local consumer's likelihood to trust, recommend, or purchase more from an organization in a given industry and correlating that rate to their satisfaction levels with a recent experience in that same industry. We used the translated likelihood rate for each of these three loyalty behaviors to perform this calculation. Effect sizes are the same as Figure 5.

In Figures **27**, **28**, and **29**, we calculated the percentages by first, for each of the three loyalty behaviors, totaling the number of consumers from each country who said they were either "somewhat" or "very" likely to trust, recommend, or purchase more from an organization in a given industry. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars. This gave us the percentages of consumers from each country who said they would likely trust, recommend, or purchase more based on their satisfaction levels.

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