



DATA SNAPSHOT

# Global Consumer Loyalty Index

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# Executive Summary

## KEY FINDINGS IN THIS REPORT

As part of our global consumer study, we asked individuals in 18 countries about their loyalty to organizations across 17 industries. Our questions examined their likelihood to do three things, recommend, trust, and purchase more from the organization. To understand overall loyalty, we created a loyalty index, which is the average across those three areas. Based on this analysis, we found that:

- + **Supermarkets have the most loyalty.** Supermarkets earned the highest level of repurchase loyalty, and the highest overall loyalty index of 78%. Streaming media services earned the highest level of recommendations, and hospitals/clinics earned the highest levels of trust.
- + **Government agencies have the least loyalty.** Across all three measurements, consumers are least loyal to government agencies, resulting in a loyalty index of 61%. Internet service providers and mobile service providers had the next lowest loyalty indexes, 67%.
- + **India and Japan report the highest and lowest loyalty.** Across all three areas, Indian consumers showed the highest levels of loyalty, while Japanese consumers showed the lowest. Their loyalty indexes are 40-points apart, 85% to 45%.
- + **The lowest level of loyalty is 25%.** The lowest areas of loyalty are government agencies in Japan and public utilities in Germany, where only 25% of consumers reported strong loyalty.
- + **The highest level of loyalty is 93%.** The highest area of loyalty is property insurance in Indonesia, where 93% of consumers reported strong loyalty. The next highest level of loyalty is 92% for colleges/universities in Hong Kong.

## STUDY KEY FACTS

- Global online study
- Conducted in Q1 2021
- 17,809 consumers
- 18 countries
- 17 industries

# Global Consumer Loyalty Index

## STUDY OVERVIEW

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 17,809 consumers across 18 countries: Australia, Brazil, Canada, France, Germany, Hong Kong, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Singapore, South Korea, Spain, Thailand, the UK, and the 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.

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*Methodology*

# Global Consumer Loyalty by Industry

## KEY TAKEAWAYS

- + Government agencies earned the lowest scores across all three aspects of loyalty. The industries with the next lowest overall loyalty indexes are Internet service and mobile phone providers.
- + Supermarkets earned the highest scores for repurchase loyalty and the overall loyalty index. The industries with the next highest overall loyalty indexes are streaming and department stores.
- + Hospitals/medical clinics earned the highest trust ratings.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on consumers' recent interactions across 18 countries, as well as the industries' Loyalty Indexes.

## Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

 Lowest Score

 Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline*</b>	75%	76%	75%	75%
<b>Bank</b>	68%	75%	69%	71%
<b>Credit Card Provider*</b>	67%	72%	68%	69%
<b>Department Store</b>	76%	77%	77%	77%
<b>Fast Food</b>	75%	75%	78%	76%
<b>Government Agency*</b>	60%	65%	58%	61%
<b>Health Insurance*</b>	71%	74%	69%	71%
<b>Hospital/Medical Clinic</b>	71%	79%	67%	73%
<b>Internet Service Provider</b>	65%	68%	68%	67%
<b>Mobile Phone Provider</b>	66%	68%	66%	67%
<b>Online Retailer</b>	74%	73%	77%	75%
<b>Parcel Delivery</b>	71%	75%	74%	73%
<b>Property Insurance*</b>	72%	73%	69%	71%
<b>Public Utility</b>	64%	71%	68%	68%
<b>Streaming*</b>	78%	76%	76%	77%
<b>Supermarket</b>	75%	79%	79%	78%
<b>University/College*</b>	70%	74%	69%	71%

\*Data not available for some countries' individual scores

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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# Global Consumer Loyalty by Country

## KEY TAKEAWAYS

- + On average, across the industries we examined, Japanese consumers are the least likely to recommend, trust, and purchase more from a company. The countries with the next lowest loyalty indexes are Germany and Spain.
- + Conversely, Indian consumers are the most likely to recommend, trust, and purchase more from a company. The countries with the next highest loyalty indexes are Indonesia and Thailand.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for 18 countries based on consumers' recent interactions across 17 industries, as well as the countries' loyalty indexes.

### Country Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

 Lowest Score

 Highest Score

Recommend	Trust	Purchase More	Loyalty Index
68%	74%	72%	71%
69%	70%	73%	71%
67%	73%	69%	69%
65%	69%	74%	69%
59%	60%	46%	55%
76%	80%	81%	79%
84%	86%	85%	85%
84%	85%	83%	84%
39%	56%	42%	45%
77%	78%	77%	77%
74%	75%	75%	75%
79%	79%	79%	79%
72%	74%	74%	74%
65%	72%	75%	70%
63%	66%	66%	65%
82%	81%	79%	81%
69%	73%	69%	71%
73%	75%	73%	74%

# Consumer Loyalty: Australia

## KEY TAKEAWAYS

- + Government agencies earned the lowest scores across all three aspects of loyalty. The industries with the next lowest overall loyalty indexes are public utilities and banks.
- + Streaming media services and supermarkets earned the highest overall loyalty indexes. The industries with the next highest overall loyalty indexes are online retailers and hospitals/medical clinics.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on Australian consumers' recent interactions, along with industries' loyalty indexes. Data is reported only for countries with 100+ respondents who reported having an experience with an organization in that industry in the previous 90 days.

## Australian Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

N/A Sample size too small

Lowest Score

Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline</b>	N/A	N/A	N/A	N/A
<b>Bank</b>	61%	72%	65%	66%
<b>Credit Card Provider</b>	N/A	N/A	N/A	N/A
<b>Department Store</b>	73%	76%	76%	75%
<b>Fast Food</b>	70%	74%	77%	74%
<b>Government Agency</b>	48%	56%	50%	51%
<b>Health Insurance</b>	68%	72%	68%	69%
<b>Hospital/Medical Clinic</b>	74%	85%	69%	76%
<b>Internet Service Provider</b>	64%	71%	67%	67%
<b>Mobile Phone Provider</b>	65%	68%	68%	67%
<b>Online Retailer</b>	75%	76%	79%	77%
<b>Parcel Delivery</b>	64%	72%	72%	69%
<b>Property Insurance</b>	N/A	N/A	N/A	N/A
<b>Public Utility</b>	58%	67%	68%	64%
<b>Streaming</b>	82%	78%	79%	79%
<b>Supermarket</b>	75%	82%	81%	79%
<b>University/College</b>	N/A	N/A	N/A	N/A

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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# Consumer Loyalty: Brazil

## KEY TAKEAWAYS

- + Mobile phone providers earned the lowest scores across all three aspects of loyalty. The industries with the next lowest overall loyalty indexes are internet service providers and public utilities.
- + Streaming media services earned the highest scores across all three aspects of loyalty. The industries with the next highest overall loyalty indexes are parcel delivery services and supermarkets.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on Brazilian consumers' recent interactions, along with industries' loyalty indexes. Data is reported only for countries with 100+ respondents who reported having an experience with an organization in that industry in the previous 90 days.

## Brazilian Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

N/A Sample size too small

Lowest Score

Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline</b>	N/A	N/A	N/A	N/A
<b>Bank</b>	67%	70%	73%	70%
<b>Credit Card Provider</b>	63%	69%	69%	67%
<b>Department Store</b>	75%	74%	79%	76%
<b>Fast Food</b>	79%	73%	80%	77%
<b>Government Agency</b>	N/A	N/A	N/A	N/A
<b>Health Insurance</b>	61%	67%	68%	66%
<b>Hospital/Medical Clinic</b>	69%	75%	68%	71%
<b>Internet Service Provider</b>	63%	59%	65%	62%
<b>Mobile Phone Provider</b>	50%	51%	56%	52%
<b>Online Retailer</b>	76%	71%	79%	75%
<b>Parcel Delivery</b>	81%	79%	83%	81%
<b>Property Insurance</b>	N/A	N/A	N/A	N/A
<b>Public Utility</b>	60%	66%	69%	65%
<b>Streaming</b>	85%	84%	84%	84%
<b>Supermarket</b>	77%	78%	83%	79%
<b>University/College</b>	67%	68%	68%	68%

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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# Consumer Loyalty: Canada

## KEY TAKEAWAYS

- + Government agencies earned the lowest scores for recommendations, repurchasing, and the overall loyalty index. The industries with the next lowest overall loyalty indexes are Internet service and mobile phone providers.
- + Supermarkets earned the highest scores for recommendations, repurchasing, and the overall loyalty index. The industries with the next highest overall Loyalty Indexes are hospitals/medical clinics and fast food restaurants.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on Canadian consumers' recent interactions, along with industries' loyalty indexes. Data is reported only for countries with 100+ respondents who reported having an experience with an organization in that industry in the previous 90 days.

## Canadian Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

N/A Sample size too small

Lowest Score

Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline</b>	N/A	N/A	N/A	N/A
<b>Bank</b>	68%	75%	66%	70%
<b>Credit Card Provider</b>	65%	78%	65%	69%
<b>Department Store</b>	65%	72%	73%	70%
<b>Fast Food</b>	71%	72%	75%	73%
<b>Government Agency</b>	47%	67%	49%	54%
<b>Health Insurance</b>	N/A	N/A	N/A	N/A
<b>Hospital/Medical Clinic</b>	75%	86%	63%	75%
<b>Internet Service Provider</b>	55%	61%	58%	58%
<b>Mobile Phone Provider</b>	62%	67%	57%	62%
<b>Online Retailer</b>	68%	70%	75%	71%
<b>Parcel Delivery</b>	60%	70%	65%	65%
<b>Property Insurance</b>	N/A	N/A	N/A	N/A
<b>Public Utility</b>	61%	75%	69%	68%
<b>Streaming</b>	73%	69%	69%	70%
<b>Supermarket</b>	76%	80%	81%	79%
<b>University/College</b>	N/A	N/A	N/A	N/A

Base: 17,509 consumers across 18 countries

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# Consumer Loyalty: France

## KEY TAKEAWAYS

- + Mobile phone providers earned the lowest scores for recommendations, trust, and the overall loyalty index. The industries with the next lowest loyalty index are internet service providers, public utilities, and health insurance.
- + Supermarkets earned the highest scores for trust, repurchasing, and the overall loyalty index. The industries with the next highest loyalty indexes are streaming and online retailers.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on French consumers' recent interactions, along with industries' loyalty indexes. Data is reported only for countries with 100+ respondents who reported having an experience with an organization in that industry in the previous 90 days.

## French Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

N/A Sample size too small

Lowest Score

Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline</b>	N/A	N/A	N/A	N/A
<b>Bank</b>	61%	67%	73%	67%
<b>Credit Card Provider</b>	N/A	N/A	N/A	N/A
<b>Department Store</b>	71%	73%	79%	74%
<b>Fast Food</b>	64%	67%	81%	71%
<b>Government Agency</b>	N/A	N/A	N/A	N/A
<b>Health Insurance</b>	61%	67%	67%	65%
<b>Hospital/Medical Clinic</b>	73%	76%	69%	72%
<b>Internet Service Provider</b>	58%	63%	63%	61%
<b>Mobile Phone Provider</b>	56%	57%	63%	59%
<b>Online Retailer</b>	70%	74%	81%	75%
<b>Parcel Delivery</b>	67%	73%	78%	73%
<b>Property Insurance</b>	N/A	N/A	N/A	N/A
<b>Public Utility</b>	57%	67%	70%	65%
<b>Streaming</b>	77%	75%	78%	77%
<b>Supermarket</b>	75%	79%	88%	81%
<b>University/College</b>	N/A	N/A	N/A	N/A

Base: 17,509 consumers across 18 countries

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# Consumer Loyalty: Germany

## KEY TAKEAWAYS

- + Public utilities earned the lowest scores for recommending, repurchasing, and the overall loyalty index. The industries with the next lowest loyalty indexes are health insurance and internet service providers.
- + Streaming services earned the highest scores for recommending and the overall loyalty index. The industries with the next highest loyalty indexes are online retailers and supermarkets.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on German consumers' recent interactions, along with industries' loyalty indexes. Data is reported only for countries with 100+ respondents who reported having an experience with an organization in that industry in the previous 90 days.

## German Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

N/A Sample size too small

Lowest Score

Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline</b>	N/A	N/A	N/A	N/A
<b>Bank</b>	54%	64%	40%	53%
<b>Credit Card Provider</b>	63%	58%	37%	53%
<b>Department Store</b>	61%	54%	57%	58%
<b>Fast Food</b>	64%	61%	57%	61%
<b>Government Agency</b>	N/A	N/A	N/A	N/A
<b>Health Insurance</b>	52%	59%	29%	47%
<b>Hospital/Medical Clinic</b>	61%	69%	29%	53%
<b>Internet Service Provider</b>	50%	51%	46%	49%
<b>Mobile Phone Provider</b>	49%	53%	39%	47%
<b>Online Retailer</b>	69%	64%	61%	65%
<b>Parcel Delivery</b>	53%	57%	44%	51%
<b>Property Insurance</b>	N/A	N/A	N/A	N/A
<b>Public Utility</b>	44%	54%	25%	41%
<b>Streaming</b>	72%	65%	60%	65%
<b>Supermarket</b>	67%	69%	55%	64%
<b>University/College</b>	N/A	N/A	N/A	N/A

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# Consumer Loyalty: Hong Kong

## KEY TAKEAWAYS

- + Parcel delivery services earned the lowest scores for recommending and the overall loyalty index. The industries with the next lowest loyalty indexes are fast food, online retailers, and mobile phone providers.
- + Streaming earned the highest scores for recommending and the overall loyalty index. The industries with the next highest loyalty indexes are public utilities, hospital/medical clinics, and internet service providers.

## ABOUT

This table shows the average (somewhat or very) likelihood to trust, purchase more, and recommend for each industry based on Hong Kong consumers' recent interactions, along with industries' loyalty indexes. Data is reported only for countries with 100+ respondents who reported having an experience with an organization in that industry in the previous 90 days.

## Hong Kong Industry Loyalty Metrics Scores

(Selected top 2 boxes on a 5-point scale)

N/A Sample size too small

Lowest Score

Highest Score

	Recommend	Trust	Purchase More	Loyalty Index
<b>Airline</b>	N/A	N/A	N/A	N/A
<b>Bank</b>	72%	82%	79%	78%
<b>Credit Card Provider</b>	77%	81%	80%	79%
<b>Department Store</b>	79%	82%	77%	79%
<b>Fast Food</b>	74%	72%	80%	75%
<b>Government Agency</b>	N/A	N/A	N/A	N/A
<b>Health Insurance</b>	N/A	N/A	N/A	N/A
<b>Hospital/Medical Clinic</b>	75%	89%	80%	81%
<b>Internet Service Provider</b>	76%	80%	86%	81%
<b>Mobile Phone Provider</b>	75%	77%	79%	77%
<b>Online Retailer</b>	76%	75%	79%	77%
<b>Parcel Delivery</b>	71%	74%	78%	74%
<b>Property Insurance</b>	N/A	N/A	N/A	N/A
<b>Public Utility</b>	74%	86%	87%	83%
<b>Streaming</b>	87%	82%	86%	85%
<b>Supermarket</b>	73%	80%	85%	79%
<b>University/College</b>	N/A	N/A	N/A	N/A

Base: 17,509 consumers across 18 countries

Source: Qualtrics XM Institute Q1 2021 Global Consumer Study

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