Qualtrics XM institute™

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.

FIGURES IN THE REPORT

1. Global Consumer Loyalty by Industry
2. Global Consumer Loyalty by Country
3. Consumer Loyalty: Australia
4. Consumer Loyalty: Brazil
5. Consumer Loyalty: Canada
6. Consumer Loyalty: France
7. Consumer Loyalty: Germany
8. Consumer Loyalty: Hong Kong
9. Consumer Loyalty: India
10. Consumer Loyalty: Indonesia
11. Consumer Loyalty: Japan
12. Consumer Loyalty: Malaysia
13. Consumer Loyalty: Mexico
14. Consumer Loyalty: Philippines
15. Consumer Loyalty: Singapore
16. Consumer Loyalty: South Korea
17. Consumer Loyalty: Spain
18. Consumer Loyalty: Thailand
19. Consumer Loyalty: UK
20. Consumer Loyalty: U.S.

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

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
Australia	68%	74%	72%	71%
Brazil	69%	70%	73%	71%
Canada	67%	73%	69%	69%
France	65%	69%	74%	69%
Germany	59%	60%	46%	55%
Hong Kong	76%	80%	81%	79%
India	84%	86%	85%	85%
Indonesia	84%	85%	83%	84%
Japan	39%	56%	42%	45%
Malaysia	77%	78%	77%	77%
Mexico	74%	75%	75%	75%
Philippines	79%	79%	79%	79%
Singapore	72%	74%	74%	74%
South Korea	65%	72%	75%	70%
Spain	63%	66%	66%	65%
Thailand	82%	81%	79%	81%
UK	69%	73%	69%	71%
U.S.	73%	75%	73%	74%

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

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

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

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

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

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

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

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

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

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

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

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