



DATA SNAPSHOT

Global Study: Areas for Customer Experience Improvements

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January 2022

Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our latest global consumer study, consumers from 24 countries told us about areas of customer experience in need of major improvement across 17 industries. We asked about seven potential areas of improvement for organizations: their process of buying goods and services, capabilities of their products and services, ease of use of their products and services, prices and fees, customer service support, communications they send, and online resources they provide. From our analysis, we found that:

- + **Prices and fees need the most improvement.** On average across all industries, 50% of all consumers say that prices and fees need to be improved, the highest of all potential areas of improvement. The only industry not to have this as one of its top two areas of improvement is government agencies. At a country level, the need to improve prices and fees ranges from a high of 65% in Indonesia and Brazil, down to a low of 36% in UK.
- + **Customer service needs improvement.** Across all industries, 43% of consumers believe that customer service support needs major improvement, the second highest area. The need for improvement is most acute for the airline and mobile phone industries, each with 50% of customers seeing room for improvement. At a country level, the need to improve customer service ranges from a high of 63% in Philippines, down to a low of 22% in Japan.
- + **The buying process and communications have the least problems.** Nine of 17 industries have the lowest percentage of consumers seeing a need for improvement in the process for buying goods and services. Communications had the lowest need for improvement in seven of 17 industries.

STUDY KEY FACTS

- Global online study
- Conducted Q3 of 2021
- 24,000 consumers
- 24 countries
- 17 industries

Global Study: Areas for Customer Experience Improvements

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2021. Using an online survey, XM Institute collected data from 24,000 consumers across 24 countries: Australia, Belgium, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Korea, Spain, Thailand, the United Kingdom, the United States, and Vietnam.

XM Institute surveyed 1,000 consumers from each of the countries. 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

CX Improvements: Global

KEY TAKEAWAYS

- + On average across all industries, 50% of all consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 43% on average saying so across all industries.
- + Global industries excel the most at creating processes for buying their goods and services, with an average of just 27% of consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of consumers, for each industry on average across all countries, that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently and the area they least frequently said need improvement.

Global Consumers' Desire For CX Improvements

(Percent of consumers selecting areas that need improvement in these industries)

N/A

Sample size too small

Highest in industry

Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	32%	31%	37%	57%	50%	33%	36%
Bank	18%	21%	29%	45%	43%	22%	24%
College/ university	26%	31%	34%	49%	43%	42%	45%
Credit card provider	29%	30%	35%	53%	47%	31%	33%
Department store	30%	28%	26%	51%	38%	21%	25%
Fast food	27%	24%	21%	48%	31%	17%	20%
Government agency	32%	38%	43%	34%	56%	47%	44%
Health insurance	32%	36%	35%	54%	45%	34%	35%
Hospital/med clinic	21%	29%	28%	43%	45%	29%	26%
Internet service	24%	35%	32%	57%	46%	28%	30%
Mobile phone provider	29%	34%	33%	61%	50%	28%	30%
Online retailer	30%	27%	26%	48%	40%	25%	26%
Parcel delivery	21%	24%	25%	41%	40%	30%	24%
Property insurance	36%	39%	38%	51%	43%	37%	36%
Public utility	24%	28%	27%	59%	43%	28%	25%
Streaming	24%	30%	31%	49%	34%	24%	30%
Supermarket	24%	22%	20%	53%	31%	13%	16%
Average	27%	30%	30%	50%	43%	29%	30%

Base: 24,000 consumers across 24 countries

Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Average by Country

KEY TAKEAWAYS

- + Consumers from 22 of 24 countries say most frequently that, across all industries, prices and fees are in most need of improvement, with China and India as the exceptions.
- + Consumers from 15 countries say least frequently that, across all industries, organizations' processes for buying goods and services needs improvement.
- + Customer service support is the second area most in need of improvement for 21 countries.

ABOUT

This table shows the percentage of consumers, for each country on average across all industries, that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently and the area they least frequently said need improvement.

Global Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small

Highest in industry

Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Australia	16%	19%	21%	45%	35%	24%	22%
Belgium	15%	19%	20%	46%	32%	25%	21%
Brazil	27%	29%	31%	65%	51%	32%	37%
Canada	17%	19%	22%	50%	35%	22%	24%
China	39%	41%	37%	40%	37%	27%	35%
France	19%	23%	23%	54%	37%	25%	21%
Germany	16%	18%	21%	42%	31%	17%	15%
Hong Kong	31%	35%	33%	46%	40%	28%	33%
India	44%	46%	45%	54%	56%	46%	49%
Indonesia	42%	47%	47%	65%	58%	40%	35%
Italy	23%	27%	28%	46%	43%	26%	28%
Japan	15%	22%	24%	47%	22%	15%	13%
Malaysia	40%	45%	43%	59%	55%	40%	43%
Mexico	29%	30%	33%	58%	55%	30%	37%
Netherlands	16%	19%	20%	38%	33%	25%	20%
New Zealand	18%	20%	20%	48%	32%	25%	23%
Philippines	42%	46%	42%	63%	63%	44%	43%
Singapore	29%	30%	30%	53%	43%	30%	31%
South Korea	21%	31%	29%	46%	44%	20%	23%
Spain	21%	24%	28%	53%	42%	25%	24%
Thailand	36%	33%	37%	49%	49%	37%	35%
UK	16%	18%	19%	36%	32%	24%	21%
US	17%	20%	21%	45%	33%	22%	21%
Vietnam	43%	45%	41%	62%	56%	27%	41%

Base: 24,000 consumers across 24 countries

Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Australia

KEY TAKEAWAYS

- + On average across all industries, 45% of Australian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 35% on average saying so across all industries.
- + Australian industries excel the most at creating processes for buying their goods and services, with an average of just 16% of Australian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Australian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Australian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Products & services			Customer service support			Online resources
	Process of buying	Products & services capabilities	ease of use	Prices and fees	Communications		
Airline	16%	24%	34%	57%	54%	32%	37%
Bank	12%	12%	14%	46%	37%	16%	14%
College/ university	16%	26%	30%	51%	32%	35%	38%
Credit card provider	20%	19%	23%	55%	39%	26%	25%
Department store	22%	14%	15%	35%	32%	13%	20%
Fast food	17%	11%	10%	38%	26%	12%	11%
Government agency	17%	28%	37%	25%	54%	46%	37%
Health insurance	17%	29%	24%	60%	26%	19%	25%
Hospital/med clinic	7%	16%	15%	27%	28%	23%	19%
Internet service	20%	27%	24%	53%	44%	32%	25%
Mobile phone provider	21%	24%	23%	51%	48%	24%	17%
Online retailer	21%	15%	17%	38%	34%	25%	20%
Parcel delivery	13%	19%	20%	32%	34%	27%	19%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	13%	16%	16%	64%	33%	27%	13%
Streaming	13%	19%	18%	45%	20%	17%	17%
Supermarket	14%	10%	10%	40%	17%	8%	10%
Average	16%	19%	21%	45%	35%	24%	22%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Belgium

KEY TAKEAWAYS

- + On average across all industries, 46% of Belgian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 32% on average saying so across all industries.
- + Belgian industries excel the most at creating processes for buying their goods and services, with an average of just 15% of Belgian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Belgian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Belgian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	20%	17%	24%	50%	46%	25%	24%
Bank	11%	14%	22%	52%	37%	19%	17%
College/ university	13%	18%	25%	33%	27%	46%	38%
Credit card provider	21%	26%	22%	51%	36%	35%	35%
Department store	11%	18%	13%	46%	17%	11%	10%
Fast food	19%	18%	17%	38%	17%	10%	10%
Government agency	20%	23%	41%	26%	50%	49%	34%
Health insurance	15%	20%	20%	36%	29%	27%	23%
Hospital/med clinic	7%	15%	17%	41%	29%	29%	16%
Internet service	15%	25%	20%	56%	44%	23%	23%
Mobile phone provider	19%	25%	23%	60%	49%	23%	24%
Online retailer	18%	18%	17%	45%	30%	23%	21%
Parcel delivery	6%	11%	14%	30%	27%	25%	16%
Property insurance	16%	24%	22%	50%	29%	30%	19%
Public utility	15%	15%	16%	66%	39%	24%	19%
Streaming	18%	24%	24%	51%	18%	17%	17%
Supermarket	13%	12%	10%	48%	17%	12%	10%
Average	15%	19%	20%	46%	32%	25%	21%

CX Improvements: Brazil

KEY TAKEAWAYS

- + On average across all industries, 65% of Brazilian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 51% on average saying so across all industries.
- + Brazilian industries excel the most at creating processes for buying their goods and services, with an average of just 27% of Brazilian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Brazilian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Brazilian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	37%	33%	40%	70%	55%	35%	43%
Bank	16%	15%	32%	69%	53%	25%	33%
College/ university	22%	33%	44%	60%	54%	44%	55%
Credit card provider	29%	29%	38%	74%	59%	39%	45%
Department store	33%	26%	26%	65%	53%	24%	34%
Fast food	21%	20%	18%	57%	37%	22%	26%
Government agency	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Health insurance	39%	38%	40%	73%	55%	41%	46%
Hospital/med clinic	21%	29%	34%	51%	62%	38%	34%
Internet service	27%	37%	33%	65%	50%	34%	37%
Mobile phone provider	37%	38%	38%	74%	69%	47%	48%
Online retailer	26%	25%	22%	59%	44%	32%	37%
Parcel delivery	23%	20%	18%	57%	39%	25%	26%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	29%	36%	32%	81%	56%	34%	39%
Streaming	22%	26%	25%	57%	37%	25%	30%
Supermarket	26%	29%	20%	68%	40%	17%	26%
Average	27%	29%	31%	65%	51%	32%	37%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Canada

KEY TAKEAWAYS

- + On average across all industries, 50% of Canadian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 35% on average saying so across all industries.
- + Canadian industries excel the most at creating processes for buying their goods and services, with an average of just 17% of Canadian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Canadian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Canadian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	28%	27%	31%	69%	51%	28%	37%
Bank	7%	10%	18%	54%	27%	15%	14%
College/ university	26%	23%	32%	63%	44%	40%	44%
Credit card provider	20%	18%	21%	53%	37%	25%	25%
Department store	21%	16%	15%	45%	30%	14%	16%
Fast food	12%	11%	10%	40%	24%	8%	8%
Government agency	16%	29%	41%	26%	57%	44%	47%
Health insurance	20%	32%	37%	52%	44%	28%	32%
Hospital/med clinic	9%	21%	25%	18%	33%	29%	20%
Internet service	18%	28%	21%	68%	36%	20%	24%
Mobile phone provider	25%	23%	24%	67%	40%	21%	26%
Online retailer	14%	11%	14%	41%	27%	13%	16%
Parcel delivery	12%	16%	19%	30%	27%	20%	20%
Property insurance	25%	20%	26%	59%	33%	28%	25%
Public utility	13%	15%	18%	63%	36%	17%	20%
Streaming	13%	18%	22%	52%	25%	17%	20%
Supermarket	14%	8%	8%	49%	17%	8%	9%
Average	17%	19%	22%	50%	35%	22%	24%

CX Improvements: China

KEY TAKEAWAYS

- + On average across all industries, 41% of Chinese consumers say that the capabilities of products and services need to be improved, the highest of all potential areas of improvement.
- + Consumers say that prices and fees needs improvement second most frequently, with 40% on average saying so across all industries.
- + Chinese industries excel the most at communications, with an average of just 27% of Chinese consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Chinese consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Chinese Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	41%	49%	45%	42%	43%	30%	39%
Bank	37%	39%	40%	37%	40%	19%	25%
College/ university	41%	50%	32%	34%	36%	27%	39%
Credit card provider	45%	48%	46%	44%	46%	32%	38%
Department store	37%	36%	35%	44%	32%	24%	31%
Fast food	31%	29%	28%	43%	26%	13%	24%
Government agency	47%	44%	43%	29%	50%	42%	47%
Health insurance	55%	49%	38%	39%	41%	31%	38%
Hospital/med clinic	39%	40%	37%	52%	32%	22%	34%
Internet service	33%	42%	39%	45%	35%	29%	34%
Mobile phone provider	38%	44%	41%	43%	41%	31%	34%
Online retailer	38%	38%	31%	40%	36%	20%	36%
Parcel delivery	34%	30%	31%	34%	36%	30%	28%
Property insurance	42%	47%	48%	41%	41%	38%	44%
Public utility	34%	34%	30%	40%	37%	28%	32%
Streaming	38%	38%	38%	39%	36%	24%	46%
Supermarket	34%	33%	27%	37%	29%	15%	24%
Average	39%	41%	37%	40%	37%	27%	35%

CX Improvements: France

KEY TAKEAWAYS

- + On average across all industries, 54% of French consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 37% on average saying so across all industries.
- + French industries excel the most at creating processes for buying their goods and services, with an average of just 19% of French consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of French consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

French Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A

Sample size too small

Highest in industry

Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	28%	22%	34%	64%	47%	29%	26%
Bank	12%	15%	21%	66%	42%	23%	17%
College/ university	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Credit card provider	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Department store	25%	26%	21%	51%	30%	20%	19%
Fast food	23%	20%	16%	41%	21%	18%	13%
Government agency	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Health insurance	20%	24%	30%	59%	36%	34%	29%
Hospital/med clinic	8%	18%	13%	36%	31%	36%	16%
Internet service	23%	30%	28%	60%	46%	27%	28%
Mobile phone provider	21%	29%	28%	65%	55%	29%	26%
Online retailer	22%	23%	25%	47%	37%	17%	20%
Parcel delivery	15%	20%	24%	39%	41%	28%	24%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	13%	22%	22%	64%	46%	28%	21%
Streaming	16%	22%	24%	52%	29%	17%	23%
Supermarket	16%	21%	17%	59%	25%	17%	11%
Average	19%	23%	23%	54%	37%	25%	21%

Base: 24,000 consumers across 24 countries

Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Germany

KEY TAKEAWAYS

- + On average across all industries, 42% of German consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 31% on average saying so across all industries.
- + German industries excel the most at providing online resources, with an average of just 15% of German consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Germany consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

German Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	28%	27%	31%	55%	47%	25%	26%
Bank	10%	11%	24%	57%	29%	13%	11%
College/ university	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Credit card provider	26%	17%	23%	49%	30%	22%	16%
Department store	19%	19%	14%	36%	26%	13%	15%
Fast food	15%	14%	17%	32%	22%	9%	11%
Government agency	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Health insurance	16%	29%	22%	39%	39%	23%	22%
Hospital/med clinic	10%	21%	25%	25%	36%	19%	13%
Internet service	15%	21%	23%	46%	34%	22%	20%
Mobile phone provider	23%	26%	31%	57%	41%	21%	23%
Online retailer	18%	13%	18%	34%	26%	15%	13%
Parcel delivery	9%	19%	19%	32%	35%	19%	9%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	12%	13%	16%	55%	28%	21%	9%
Streaming	13%	17%	20%	41%	22%	16%	17%
Supermarket	14%	11%	13%	36%	20%	6%	7%
Average	16%	18%	21%	42%	31%	17%	15%

CX Improvements: Hong Kong

KEY TAKEAWAYS

- + On average across all industries, 46% of Hong Kong consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 40% on average saying so across all industries.
- + Hong Kong industries excel the most at communications, with an average of just 28% of Hong Kong consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Hong Kong consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Hong Kong Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	39%	38%	37%	45%	42%	37%	42%
Bank	26%	30%	32%	39%	45%	22%	30%
College/ university	36%	34%	39%	40%	42%	35%	40%
Credit card provider	32%	38%	38%	45%	44%	34%	36%
Department store	32%	37%	25%	50%	34%	25%	28%
Fast food	31%	31%	20%	57%	31%	17%	20%
Government agency	38%	39%	40%	31%	47%	38%	41%
Health insurance	34%	38%	35%	47%	41%	28%	40%
Hospital/med clinic	30%	33%	29%	48%	45%	26%	31%
Internet service	24%	38%	42%	50%	39%	28%	36%
Mobile phone provider	30%	38%	36%	43%	45%	27%	37%
Online retailer	34%	31%	31%	44%	40%	24%	28%
Parcel delivery	25%	25%	27%	43%	39%	31%	31%
Property insurance	34%	41%	40%	44%	39%	30%	41%
Public utility	29%	29%	29%	45%	39%	26%	28%
Streaming	30%	36%	36%	45%	36%	28%	39%
Supermarket	28%	33%	24%	62%	29%	13%	17%
Average	31%	35%	33%	46%	40%	28%	33%

CX Improvements: India

KEY TAKEAWAYS

- + On average across all industries, 56% of Indian consumers say that customer service support needs to be improved, the highest of all potential areas of improvement.
- + Consumers say that prices and fees needs improvement second most frequently, with 54% on average saying so across all industries.
- + Indian industries excel the most at creating processes for buying their goods and services, with an average of just 44% of Indian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Indian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Indian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	44%	43%	49%	57%	58%	44%	58%
Bank	33%	36%	37%	42%	60%	46%	44%
College/ university	41%	44%	45%	61%	51%	51%	57%
Credit card provider	48%	51%	52%	53%	57%	46%	53%
Department store	44%	41%	40%	60%	55%	33%	41%
Fast food	45%	36%	36%	54%	42%	36%	38%
Government agency	48%	54%	52%	48%	63%	55%	53%
Health insurance	49%	51%	56%	56%	56%	51%	57%
Hospital/med clinic	44%	53%	47%	65%	66%	45%	50%
Internet service	39%	46%	44%	56%	56%	45%	46%
Mobile phone provider	47%	49%	48%	61%	67%	46%	51%
Online retailer	49%	47%	44%	50%	59%	45%	50%
Parcel delivery	36%	33%	37%	50%	50%	48%	43%
Property insurance	52%	56%	46%	50%	56%	51%	52%
Public utility	42%	48%	41%	46%	54%	48%	41%
Streaming	37%	49%	42%	59%	52%	37%	43%
Supermarket	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Average	44%	46%	45%	54%	56%	46%	49%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Indonesia

KEY TAKEAWAYS

- + On average across all industries, 65% of Indonesian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 58% on average saying so across all industries.
- + Indonesian industries excel the most at providing online resources, with an average of just 35% of Indonesian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Indonesian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Indonesian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	45%	47%	53%	69%	58%	44%	41%
Bank	24%	32%	55%	45%	61%	33%	30%
College/ university	36%	46%	47%	60%	49%	46%	54%
Credit card provider	41%	48%	49%	66%	58%	43%	40%
Department store	45%	42%	38%	72%	51%	32%	26%
Fast food	48%	42%	33%	69%	52%	27%	24%
Government agency	48%	56%	57%	43%	69%	64%	51%
Health insurance	45%	57%	53%	66%	59%	41%	36%
Hospital/med clinic	38%	58%	52%	67%	70%	44%	34%
Internet service	36%	53%	49%	72%	61%	35%	33%
Mobile phone provider	35%	53%	47%	78%	61%	32%	27%
Online retailer	48%	44%	46%	66%	59%	38%	34%
Parcel delivery	35%	38%	45%	60%	56%	47%	34%
Property insurance	56%	52%	53%	61%	51%	53%	42%
Public utility	45%	45%	45%	69%	54%	35%	27%
Streaming	41%	46%	48%	63%	53%	32%	36%
Supermarket	40%	36%	38%	79%	56%	28%	24%
Average	42%	47%	47%	65%	58%	40%	35%

CX Improvements: Italy

KEY TAKEAWAYS

- + On average across all industries, 46% of Italian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 43% on average saying so across all industries.
- + Italian industries excel the most at creating processes for buying their goods and services, with an average of just 23% of Italian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Italian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Italian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	28%	28%	35%	54%	55%	28%	31%
Bank	16%	22%	26%	54%	48%	19%	22%
College/ university	21%	24%	35%	34%	45%	47%	45%
Credit card provider	26%	24%	32%	54%	46%	31%	29%
Department store	21%	27%	20%	50%	27%	18%	18%
Fast food	19%	29%	19%	35%	24%	12%	14%
Government agency	28%	33%	39%	32%	56%	40%	45%
Health insurance	30%	35%	33%	50%	54%	32%	34%
Hospital/med clinic	17%	21%	26%	30%	56%	30%	31%
Internet service	26%	29%	33%	52%	46%	28%	29%
Mobile phone provider	20%	30%	29%	57%	54%	26%	25%
Online retailer	21%	26%	20%	41%	30%	18%	20%
Parcel delivery	14%	16%	19%	37%	36%	25%	19%
Property insurance	36%	35%	37%	50%	46%	37%	43%
Public utility	27%	31%	27%	61%	49%	30%	28%
Streaming	17%	27%	26%	43%	31%	18%	30%
Supermarket	16%	23%	13%	44%	28%	8%	11%
Average	23%	27%	28%	46%	43%	26%	28%

CX Improvements: Japan

KEY TAKEAWAYS

- + On average across all industries, 47% of Japanese consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 24% on average saying so across all industries.
- + Japanese industries excel the most at providing online resources, with an average of just 13% of Japanese consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Japanese consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Japanese Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small ■ Highest in industry ■ Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bank	6%	16%	27%	24%	22%	13%	10%
College/ university	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Credit card provider	11%	20%	26%	32%	33%	13%	13%
Department store	21%	24%	25%	48%	26%	22%	18%
Fast food	14%	20%	14%	49%	9%	10%	12%
Government agency	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Health insurance	18%	30%	32%	46%	34%	25%	25%
Hospital/med clinic	8%	13%	14%	29%	17%	20%	10%
Internet service	16%	29%	27%	50%	25%	16%	12%
Mobile phone provider	20%	33%	35%	68%	30%	15%	14%
Online retailer	24%	25%	24%	54%	22%	13%	11%
Parcel delivery	14%	17%	21%	44%	18%	14%	11%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	7%	17%	15%	68%	20%	13%	10%
Streaming	16%	29%	35%	43%	19%	20%	23%
Supermarket	15%	19%	19%	56%	10%	9%	5%
Average	15%	22%	24%	47%	22%	15%	13%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Malaysia

KEY TAKEAWAYS

- + On average across all industries, 59% of Malaysian consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 55% on average saying so across all industries.
- + Malaysian industries excel the most at communications, with an average of just 40% of Mexican consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Malaysian consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Malaysian Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	49%	49%	51%	60%	52%	46%	48%
Bank	29%	34%	39%	42%	57%	30%	41%
College/ university	33%	41%	34%	63%	51%	53%	56%
Credit card provider	33%	43%	47%	63%	57%	40%	43%
Department store	51%	46%	47%	61%	52%	37%	42%
Fast food	43%	38%	33%	55%	46%	30%	37%
Government agency	42%	51%	53%	42%	68%	52%	54%
Health insurance	44%	52%	47%	68%	58%	42%	49%
Hospital/med clinic	30%	41%	42%	50%	60%	38%	37%
Internet service	34%	54%	44%	64%	57%	34%	41%
Mobile phone provider	41%	49%	47%	70%	58%	35%	41%
Online retailer	48%	46%	40%	59%	57%	41%	40%
Parcel delivery	37%	43%	38%	57%	57%	46%	41%
Property insurance	49%	53%	51%	61%	57%	46%	52%
Public utility	30%	41%	36%	52%	54%	34%	35%
Streaming	39%	47%	50%	63%	52%	39%	51%
Supermarket	50%	41%	36%	66%	45%	31%	30%
Average	40%	45%	43%	59%	55%	40%	43%

CX Improvements: Mexico

KEY TAKEAWAYS

- + On average across all industries, 58% of Mexican consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 55% on average saying so across all industries.
- + Mexican industries excel the most at creating processes for buying their goods and services, with an average of just 29% of Malaysian consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Mexican consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Mexican Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	34%	29%	36%	64%	66%	28%	48%
Bank	13%	16%	30%	39%	61%	21%	35%
College/ university	16%	25%	32%	49%	55%	43%	53%
Credit card provider	33%	30%	45%	54%	69%	40%	44%
Department store	36%	27%	29%	55%	51%	23%	39%
Fast food	30%	25%	21%	59%	38%	17%	24%
Government agency	36%	47%	54%	47%	74%	57%	54%
Health insurance	32%	34%	35%	67%	57%	36%	40%
Hospital/med clinic	27%	39%	37%	58%	59%	28%	29%
Internet service	24%	36%	34%	64%	63%	29%	35%
Mobile phone provider	32%	34%	35%	70%	66%	34%	41%
Online retailer	35%	22%	25%	53%	44%	32%	39%
Parcel delivery	24%	23%	29%	52%	46%	32%	29%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	29%	29%	28%	72%	49%	25%	26%
Streaming	25%	28%	33%	55%	45%	24%	33%
Supermarket	35%	30%	30%	63%	42%	15%	26%
Average	29%	30%	33%	58%	55%	30%	37%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Netherlands

KEY TAKEAWAYS

- + On average across all industries, 38% of Dutch consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 33% on average saying so across all industries.
- + Dutch industries excel the most at creating processes for buying their goods and services, with an average of just 16% of Dutch consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Dutch consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

Dutch Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	19%	21%	26%	49%	50%	34%	30%
Bank	13%	18%	20%	44%	35%	26%	15%
College/ university	12%	23%	26%	25%	30%	39%	30%
Credit card provider	21%	25%	26%	32%	39%	27%	27%
Department store	18%	19%	18%	40%	26%	18%	20%
Fast food	16%	16%	13%	40%	25%	13%	12%
Government agency	13%	20%	28%	23%	42%	43%	31%
Health insurance	20%	21%	20%	50%	37%	25%	18%
Hospital/med clinic	8%	13%	18%	25%	26%	27%	18%
Internet service	15%	25%	26%	53%	37%	24%	23%
Mobile phone provider	19%	17%	18%	50%	39%	20%	16%
Online retailer	17%	14%	14%	36%	32%	19%	16%
Parcel delivery	10%	16%	16%	22%	31%	29%	16%
Property insurance	17%	21%	21%	29%	29%	24%	19%
Public utility	18%	17%	19%	49%	33%	23%	18%
Streaming	18%	22%	24%	42%	31%	20%	17%
Supermarket	12%	10%	12%	40%	18%	11%	7%
Average	16%	19%	20%	38%	33%	25%	20%

CX Improvements: New Zealand

KEY TAKEAWAYS

- + On average across all industries, 48% of New Zealander consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 32% on average saying so across all industries.
- + New Zealander industries excel the most at creating processes for buying their goods and services, with an average of just 18% of New Zealander consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of New Zealander consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

New Zealander Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	22%	19%	22%	56%	37%	31%	29%
Bank	10%	14%	18%	45%	32%	19%	16%
College/ university	20%	27%	26%	55%	38%	39%	39%
Credit card provider	19%	23%	27%	66%	37%	26%	27%
Department store	21%	16%	10%	42%	24%	11%	18%
Fast food	19%	14%	12%	42%	23%	16%	17%
Government agency	19%	27%	34%	29%	55%	44%	39%
Health insurance	20%	26%	26%	51%	31%	32%	24%
Hospital/med clinic	9%	15%	14%	34%	33%	30%	17%
Internet service	20%	24%	23%	58%	37%	26%	27%
Mobile phone provider	19%	20%	23%	56%	34%	25%	22%
Online retailer	19%	12%	14%	35%	28%	22%	16%
Parcel delivery	13%	19%	16%	32%	27%	22%	19%
Property insurance	29%	27%	24%	58%	32%	42%	27%
Public utility	18%	18%	21%	58%	32%	20%	19%
Streaming	15%	23%	19%	46%	20%	15%	20%
Supermarket	17%	9%	10%	54%	21%	8%	13%
Average	18%	20%	20%	48%	32%	25%	23%

CX Improvements: Philippines

KEY TAKEAWAYS

- + On average across all industries, 63% of Filipino consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 63% on average saying so across all industries.
- + Filipino industries excel the most at creating processes for buying their goods and services, with an average of just 42% of Filipino consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Filipino consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Filipino Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bank	23%	28%	37%	42%	60%	37%	36%
College/ university	31%	37%	42%	59%	54%	59%	52%
Credit card provider	44%	42%	49%	74%	74%	44%	47%
Department store	50%	49%	41%	72%	60%	33%	40%
Fast food	47%	38%	34%	62%	51%	32%	34%
Government agency	50%	55%	54%	52%	78%	66%	59%
Health insurance	45%	48%	50%	63%	63%	51%	50%
Hospital/med clinic	40%	44%	38%	73%	60%	39%	38%
Internet service	36%	62%	47%	63%	73%	50%	42%
Mobile phone provider	47%	58%	51%	70%	77%	50%	49%
Online retailer	52%	52%	42%	64%	66%	48%	42%
Parcel delivery	38%	40%	37%	52%	56%	49%	40%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	41%	46%	40%	69%	57%	38%	33%
Streaming	34%	44%	43%	58%	57%	43%	50%
Supermarket	50%	40%	33%	70%	53%	21%	34%
Average	42%	46%	42%	63%	63%	44%	43%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Singapore

KEY TAKEAWAYS

- + On average across all industries, 53% of Singaporean consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 43% on average saying so across all industries.
- + Singaporean industries excel the most at creating processes for buying their goods and services, with an average of just 29% of Singaporean consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Singaporean consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Singaporean Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	42%	33%	36%	59%	47%	38%	41%
Bank	22%	23%	31%	51%	42%	23%	26%
College/ university	27%	32%	26%	55%	41%	45%	50%
Credit card provider	24%	29%	32%	57%	50%	33%	29%
Department store	35%	28%	33%	54%	39%	22%	22%
Fast food	26%	19%	23%	51%	33%	18%	17%
Government agency	28%	31%	36%	28%	52%	50%	41%
Health insurance	41%	45%	33%	63%	48%	35%	42%
Hospital/med clinic	25%	33%	23%	60%	48%	28%	29%
Internet service	28%	37%	36%	54%	46%	30%	36%
Mobile phone provider	33%	36%	34%	56%	45%	31%	28%
Online retailer	33%	26%	24%	56%	46%	23%	26%
Parcel delivery	22%	27%	22%	45%	48%	37%	22%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	21%	27%	29%	49%	41%	30%	31%
Streaming	23%	30%	34%	47%	32%	23%	37%
Supermarket	29%	18%	20%	53%	35%	14%	16%
Average	29%	30%	30%	53%	43%	30%	31%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: South Korea

KEY TAKEAWAYS

- + On average across all industries, 46% of South Korean consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 44% on average saying so across all industries.
- + South Korean industries excel the most at communications, with an average of just 20% of South Korean consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of South Korean consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently.

South Korean Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small ■ Highest in industry ■ Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	34%	28%	41%	45%	46%	30%	27%
Bank	11%	22%	28%	22%	46%	9%	20%
College/ university	24%	28%	29%	45%	40%	32%	39%
Credit card provider	23%	29%	32%	39%	49%	19%	25%
Department store	26%	32%	33%	59%	48%	21%	19%
Fast food	20%	31%	19%	51%	33%	13%	15%
Government agency	24%	29%	32%	28%	61%	28%	30%
Health insurance	28%	36%	33%	48%	55%	30%	28%
Hospital/med clinic	13%	23%	19%	45%	43%	11%	14%
Internet service	22%	31%	31%	45%	44%	14%	28%
Mobile phone provider	27%	41%	32%	60%	45%	14%	21%
Online retailer	28%	38%	30%	54%	36%	22%	20%
Parcel delivery	11%	20%	22%	31%	39%	24%	15%
Property insurance	22%	45%	34%	55%	52%	24%	24%
Public utility	11%	27%	24%	49%	46%	19%	15%
Streaming	21%	31%	30%	49%	31%	16%	37%
Supermarket	16%	28%	24%	57%	31%	9%	9%
Average	21%	31%	29%	46%	44%	20%	23%

CX Improvements: Spain

KEY TAKEAWAYS

- + On average across all industries, 53% of Spanish consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 42% on average saying so across all industries.
- + Spanish industries excel the most at creating processes for buying their goods and services, with an average of just 21% of Spanish consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Spanish consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Spanish Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	25%	22%	32%	60%	52%	22%	27%
Bank	15%	20%	32%	56%	49%	19%	22%
College/ university	21%	24%	38%	55%	45%	45%	38%
Credit card provider	32%	28%	35%	52%	47%	26%	32%
Department store	27%	20%	18%	52%	35%	17%	16%
Fast food	20%	23%	19%	47%	29%	12%	14%
Government agency	19%	39%	50%	28%	54%	44%	41%
Health insurance	25%	27%	31%	53%	40%	34%	28%
Hospital/med clinic	8%	26%	30%	22%	53%	28%	24%
Internet service	22%	27%	26%	68%	46%	25%	21%
Mobile phone provider	26%	27%	24%	71%	49%	23%	25%
Online retailer	25%	15%	22%	50%	33%	20%	18%
Parcel delivery	13%	17%	21%	38%	35%	32%	20%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	24%	29%	30%	78%	52%	32%	27%
Streaming	15%	21%	23%	51%	26%	15%	16%
Supermarket	21%	19%	17%	60%	28%	10%	16%
Average	21%	24%	28%	53%	42%	25%	24%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Thailand

KEY TAKEAWAYS

- + On average across all industries, 49% of Thai consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 49% on average saying so across all industries.
- + Thai industries excel the most at developing the capabilities of their products and services, with an average of just 33% of Thai consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Thai consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Thai Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	42%	34%	50%	50%	51%	42%	41%
Bank	23%	17%	32%	40%	45%	26%	28%
College/ university	30%	29%	34%	47%	47%	58%	52%
Credit card provider	38%	36%	40%	56%	48%	43%	41%
Department store	38%	34%	31%	42%	47%	30%	24%
Fast food	39%	29%	33%	48%	43%	23%	27%
Government agency	46%	42%	45%	35%	57%	51%	47%
Health insurance	46%	42%	43%	58%	51%	48%	49%
Hospital/med clinic	33%	25%	38%	46%	63%	36%	27%
Internet service	25%	39%	32%	57%	47%	34%	31%
Mobile phone provider	34%	33%	36%	58%	51%	35%	34%
Online retailer	35%	31%	33%	50%	48%	34%	36%
Parcel delivery	28%	27%	30%	49%	46%	31%	28%
Property insurance	49%	36%	42%	58%	51%	44%	43%
Public utility	32%	36%	37%	56%	49%	35%	27%
Streaming	42%	44%	44%	49%	41%	43%	45%
Supermarket	30%	26%	29%	31%	44%	17%	17%
Average	36%	33%	37%	49%	49%	37%	35%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: United Kingdom

KEY TAKEAWAYS

- + On average across all industries, 36% of UK consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 32% on average saying so across all industries.
- + UK industries excel the most at creating processes for buying their goods and services, with an average of just 16% of UK consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of UK consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

UK Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	21%	21%	29%	48%	39%	30%	29%
Bank	10%	13%	16%	31%	27%	16%	15%
College/ university	16%	19%	25%	35%	37%	35%	41%
Credit card provider	15%	13%	18%	46%	32%	26%	23%
Department store	23%	20%	19%	34%	26%	19%	15%
Fast food	18%	12%	12%	34%	22%	15%	15%
Government agency	17%	25%	29%	23%	37%	39%	29%
Health insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Hospital/med clinic	11%	17%	23%	13%	34%	33%	19%
Internet service	14%	25%	22%	42%	40%	26%	25%
Mobile phone provider	19%	19%	17%	48%	34%	23%	20%
Online retailer	17%	15%	14%	32%	28%	17%	12%
Parcel delivery	16%	19%	19%	31%	36%	29%	19%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	18%	16%	17%	55%	35%	27%	20%
Streaming	13%	20%	20%	36%	28%	17%	17%
Supermarket	13%	10%	10%	35%	19%	10%	10%
Average	16%	18%	19%	36%	32%	24%	21%

Base: 24,000 consumers across 24 countries
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CX Improvements: United States

KEY TAKEAWAYS

- + On average across all industries, 45% of American consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 33% on average saying so across all industries.
- + American industries excel the most at creating processes for buying their goods and services, with an average of just 17% of American consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of American consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

American Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	20%	25%	31%	58%	42%	25%	23%
Bank	10%	11%	18%	34%	23%	13%	18%
College/ university	23%	30%	26%	53%	41%	33%	34%
Credit card provider	13%	17%	20%	46%	36%	22%	20%
Department store	21%	16%	14%	40%	30%	15%	18%
Fast food	17%	14%	11%	40%	25%	14%	7%
Government agency	31%	37%	42%	33%	52%	42%	45%
Health insurance	22%	23%	30%	53%	38%	32%	27%
Hospital/med clinic	13%	19%	20%	45%	33%	29%	25%
Internet service	17%	26%	20%	57%	39%	20%	22%
Mobile phone provider	18%	24%	20%	53%	37%	20%	20%
Online retailer	17%	13%	14%	36%	29%	12%	16%
Parcel delivery	13%	16%	21%	40%	30%	23%	17%
Property insurance	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Public utility	11%	20%	17%	51%	29%	23%	20%
Streaming	17%	21%	27%	44%	25%	17%	21%
Supermarket	16%	9%	12%	43%	19%	9%	9%
Average	17%	20%	21%	45%	33%	22%	21%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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CX Improvements: Vietnam

KEY TAKEAWAYS

- + On average across all industries, 62% of Vietnamese consumers say that prices and fees need to be improved, the highest of all potential areas of improvement.
- + Consumers say that customer service support needs improvement second most frequently, with 56% on average saying so across all industries.
- + Vietnamese industries excel the most at communications, with an average of just 27% of Vietnamese consumers saying this is an area in need of improvement.

ABOUT

This table shows the percentage of Vietnamese consumers that said each area of customer experience needs major improvement and highlights the top two areas consumers most frequently. Data is reported only for industries with 100+ respondents reporting an experience with an organization in that industry in the previous 90 days.

Vietnamese Consumers' Areas for CX Improvements

(Percent of consumers selecting each option)

N/A Sample size too small Highest in industry Second highest

	Process of buying	Products & services capabilities	Products & services ease of use	Prices and fees	Customer service support	Communications	Online resources
Airline	51%	47%	50%	63%	56%	38%	48%
Bank	37%	31%	43%	59%	54%	16%	31%
College/ university	35%	47%	45%	52%	45%	35%	48%
Credit card provider	43%	42%	51%	63%	52%	29%	47%
Department store	45%	46%	35%	74%	52%	16%	39%
Fast food	52%	47%	36%	73%	50%	19%	40%
Government agency	44%	47%	43%	42%	51%	41%	48%
Health insurance	50%	49%	46%	55%	54%	30%	46%
Hospital/med clinic	47%	56%	36%	64%	67%	20%	39%
Internet service	28%	43%	39%	62%	65%	19%	48%
Mobile phone provider	40%	52%	47%	68%	64%	24%	41%
Online retailer	52%	52%	33%	69%	64%	19%	40%
Parcel delivery	34%	43%	34%	59%	62%	37%	35%
Property insurance	47%	48%	47%	52%	48%	40%	41%
Public utility	40%	42%	34%	69%	60%	25%	34%
Streaming	44%	46%	45%	52%	53%	39%	46%
Supermarket	39%	31%	25%	74%	62%	9%	35%
Average	43%	45%	41%	62%	56%	27%	41%

Base: 24,000 consumers across 24 countries
Source: Qualtrics XM Institute Q3 2021 Global Consumer Study

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DATA CALCULATION

In **Figure 1**, each percentage is calculated by taking the average of the percentages of consumers selecting each area of improvement for each industry across all countries with qualifying industries, as calculated for Figures 3-26. Qualifying industries have 100+ consumers in a country reporting an experience in that industry in the past 90 days.

In **Figure 2**, each percentage is calculated by taking the average of the percentages of consumers selecting each area for improvement in each country across all qualifying industries, as calculated for Figures 3-26. Qualifying industries have 100+ consumers in a country reporting an experience in that industry in the past 90 days.

In **Figures 3-26**, each percentage is calculated by taking the number of consumers selecting each area for improvement for that industry and dividing by the total number of consumers in that country reporting an experience in that industry in the past 90 days. Consumers were able to select the top two areas they thought needed “major improvements”. Data is not calculated for industries that do not meet the 100+ consumer threshold.

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PUBLICATION DATE

January 2022

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