



DATA SNAPSHOT

# Global Executives Study: The State of Experience Management, 2022

**Bruce Temkin, CCXP, XMP**  
Head of Qualtrics XM Institute

**Moira Dorsey, XMP**  
XM Catalyst

**Talia Quaadgras**  
Senior Research Associate

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# Executive Summary

## KEY FINDINGS IN THIS REPORT

We surveyed over 1,500 executives at companies with 2,000 or more employees around the world about the state of experience management at their organizations. In this data snapshot, we examined the experience management capabilities, obstacles, and expected need for experience management that they reported. Some key takeaways include:

- + **Companies with good XM have better business performance.** Executives that report that their companies have significantly above-average experience management capabilities are 52-percentage points more likely to report above-average revenue growth, and 48-percentage points more likely to report above average profitability.
- + **Most companies will put more energy into their CX, EX, PX, and BX efforts this year.** 73% of executives say that they'll devote more effort to their customer experience programs this year. 72%, 70%, and 68% of executives say the same for employee experience, product experience, and brand experience, respectively.
- + **Executives report strong XM skills and capabilities.** More than 8 out of 10 executives say their organization has strong XM skills and capabilities. 80% say the same about their XM technology, and 75% report strong organizational culture that encourages XM.
- + **'Technological limitations' and 'lack of clear strategy' are top XM obstacles.** Executives that report at or below average XM capabilities most frequently cite 'lack of clear strategy' as an obstacle (29%), while those that report significantly above average XM capabilities find 'technological limitations' most challenging (26%).
- + **Expect adjustments to customer and employee interactions.** Over half of executives say their organization needs to make significant changes to how it interacts with employees and customers. Under 3% of executives expect no change to their customer and employee interactions.

## STUDY KEY FACTS

- Global Online Study
- Conducted Q4 of 2021
- 1,541 executives from companies with 2,000+ employees
- 10 countries

# Global Executives Study: The State of Experience Management, 2022

## STUDY OVERVIEW

The data for this report comes from a global executives study that Qualtrics XM Institute conducted in the fourth quarter of 2021. Using an online survey, XM Institute collected data from 1,541 executives of companies with 2,000+ employees within Australia, Brazil, Canada, France, Germany, Japan, Mexico, Singapore, the United Kingdom, and the United States, for a total of approximately 150 respondents from each country.

## FIGURES IN THE REPORT

1. Demographics
2. Business Performance by XM Capabilities
3. Importance of Improving XM
4. Importance of Improving Experience Areas
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*Methodology*

# Demographics

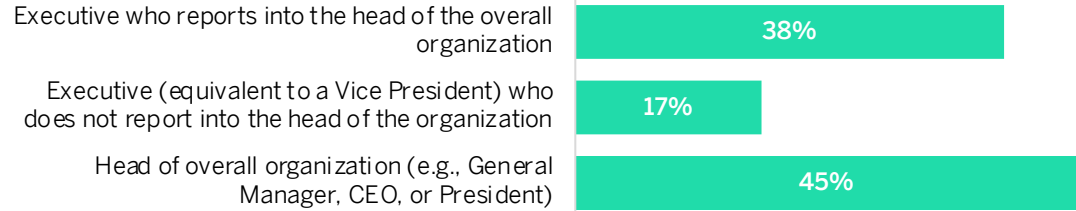
## KEY TAKEAWAYS

- + 83% of respondents either are the head of their organization or report to the head of their organization.
- + Most respondents primarily sell to businesses or consumers.

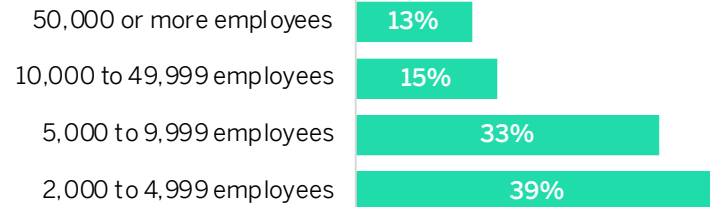
## ABOUT

These charts show the professional demographics (role, organization size, and customer base) of the respondents for this study.

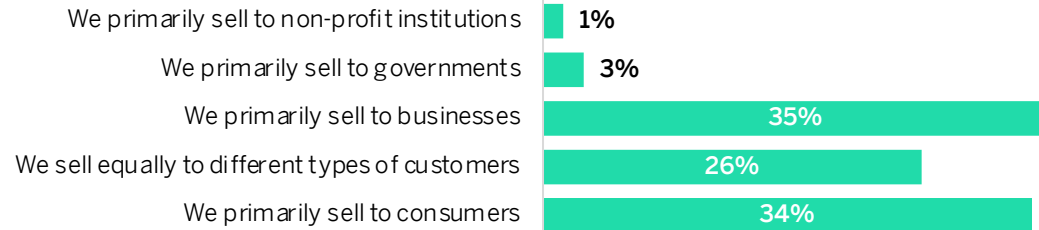
### Role



### Organization Size



### Customer Base

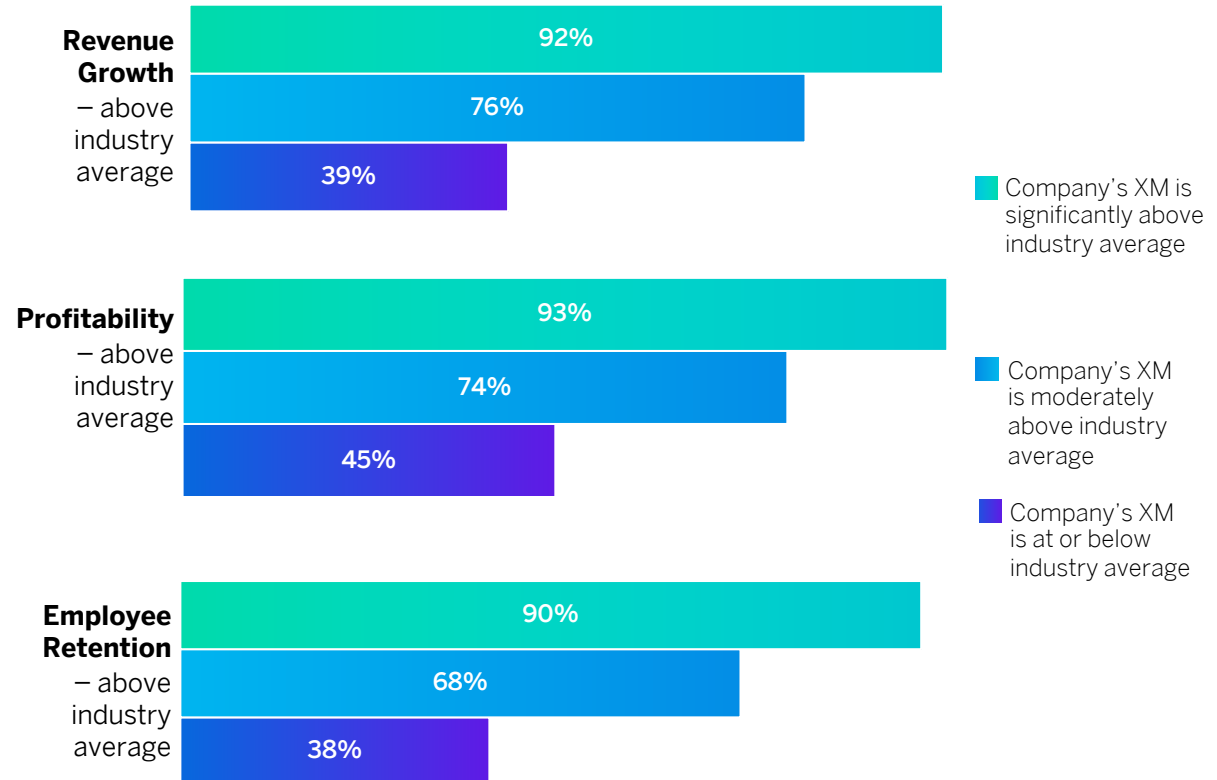


# Business Performance by XM Capabilities

## KEY TAKEAWAYS

- + Companies with significantly above-industry-average XM are 53-percentage points more likely to report revenue growth above their industry average.
- + Companies with industry-average or worse XM are 48-percentage points less likely to report above-industry average profitability.
- + Companies with significantly above-industry-average XM are 52-percentage points more likely to report employee retention above the industry average.

## Business Performance Based on XM Performance Self-Assessment



## ABOUT

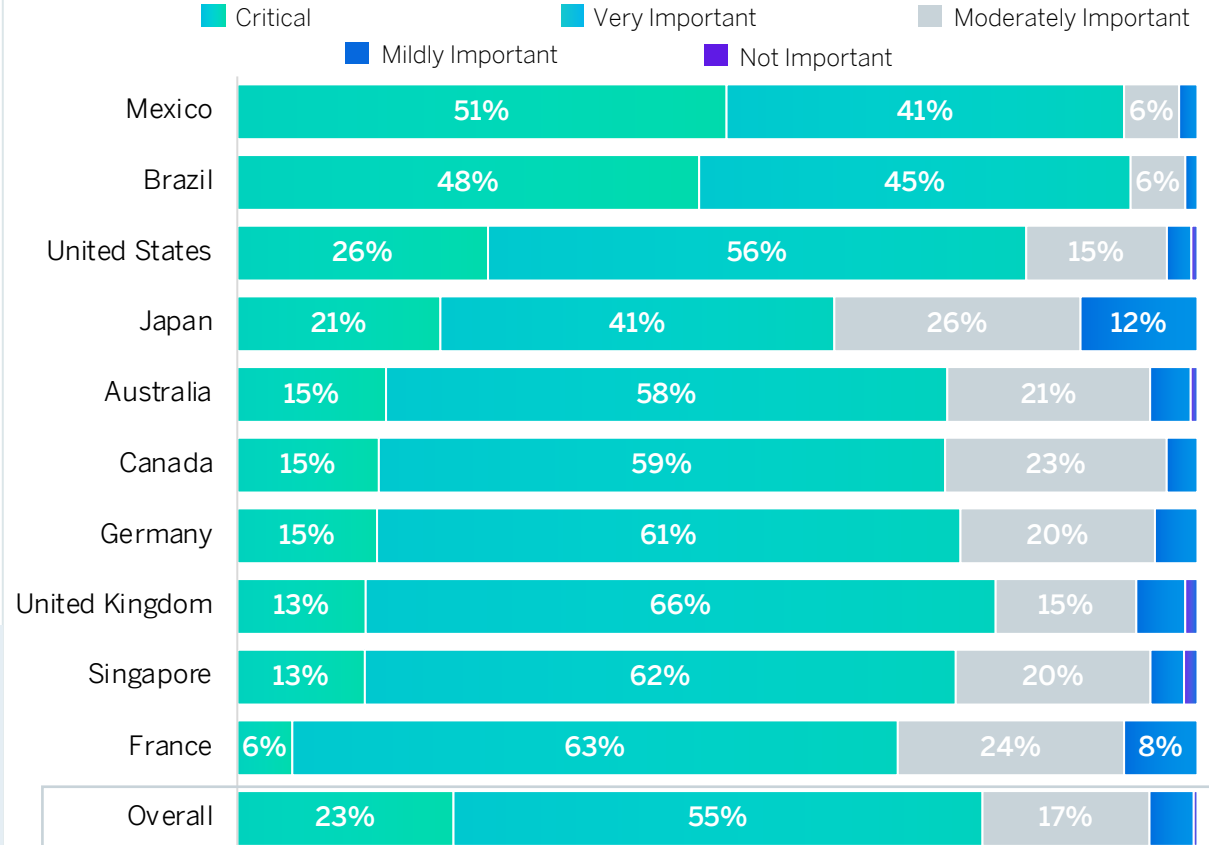
These charts show the percentage of executives that reported above-average revenue growth, profitability, and employee retention according to their XM performance self-assessment.

# Importance of Improving XM

## KEY TAKEAWAYS

- + Overall, 78% of executives say that improving experience management capabilities is “critical” or “very important” for their organization.
- + More than 90% of Mexican and Brazilian executives say improving XM capabilities is “critical” or “very important.”
- + Japanese executives are least likely to say improving XM capabilities is “critical” or “very important,” at 62%.

Over the next three years, how important do you think it is for your organization to improve its Experience Management capabilities?



## ABOUT

This chart shows how important executives from each country believe improving experience management capabilities in their organization is over the next three years.

Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

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# Importance of Improving Experience Areas

## KEY TAKEAWAYS

- + Overall, more than two-thirds of executives plan to put more effort into all four areas of Experience Management.
- + Mexican executives say their organizations will put more effort into the four experience areas most frequently.
- + Japanese executives are least likely to say their organization will put more effort into the four experience areas.

## ABOUT

These charts show the percentage of executives from each company that say their organization will put “significantly” or “moderately” more effort into improving customer, employee, product, and brand experience during the next 12 months.

## Compared with the previous year, how much effort will your organization put into improving these experiences during the next 12 months?

(“Significantly” or “Moderately” more)

	Customer Experience	Employee Experience	Product Experience	Brand Experience
Mexico	88%	87%	86%	87%
Brazil	85%	86%	85%	82%
United States	78%	79%	78%	77%
Australia	75%	75%	72%	73%
Singapore	73%	73%	71%	71%
Germany	73%	70%	68%	58%
France	69%	64%	61%	63%
United Kingdom	69%	75%	64%	64%
Canada	68%	66%	69%	64%
Japan	51%	43%	53%	44%
Overall	73%	72%	70%	68%

# Using Insights to Improve CX

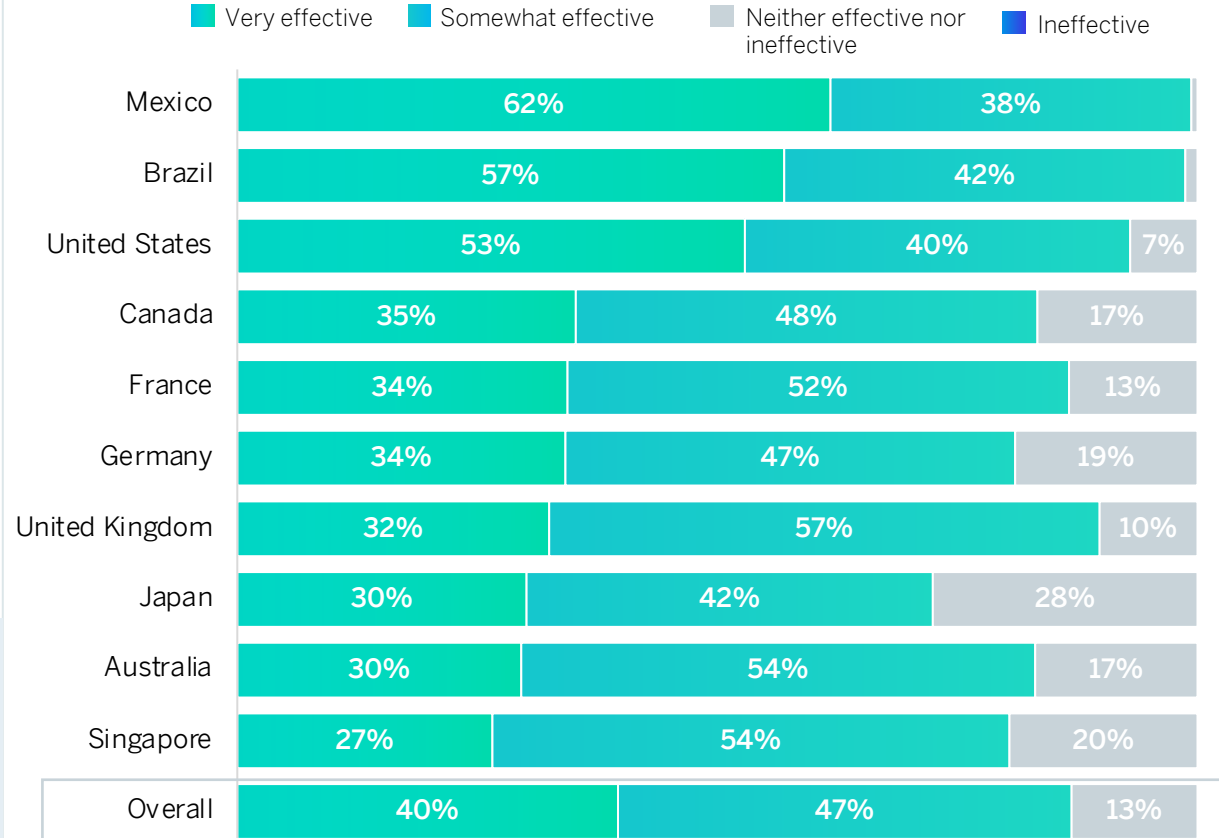
## KEY TAKEAWAYS

- + No executives say that their company is ineffective at using insights about customers to make CX improvements.
- + 40% of executives say their companies are “very effective” at using customer insights to make CX improvements.
- + Mexican and Brazilian executives are the most likely and Japanese executives are the least likely to say their organization is effective at using customer insights to make CX improvements.

## ABOUT

This chart shows how effective executives from each company believe their organization is at using insights about how customers are thinking and feeling to make customer experience improvements.

## How effective is your company at using insights about how customers are thinking and feeling to make improvements in how you treat customers?



Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

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# Using Insights to Improve EX

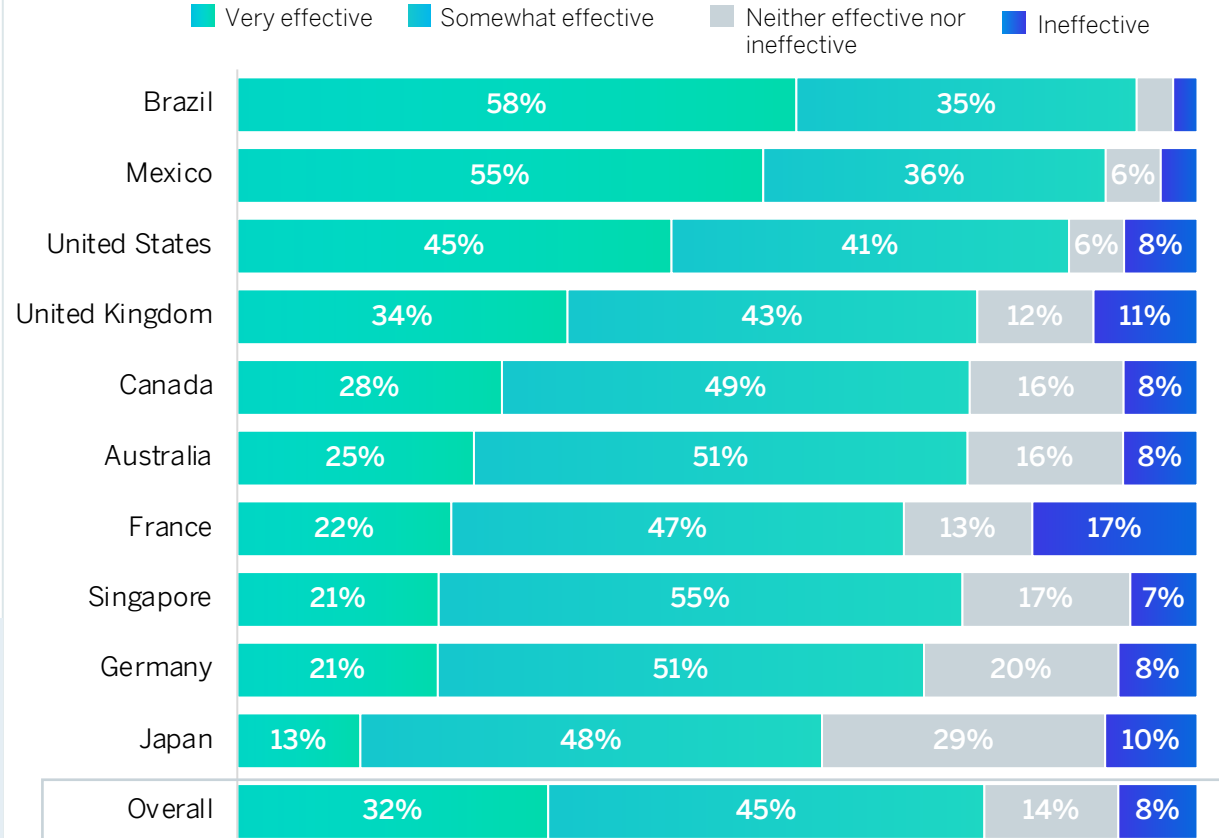
## KEY TAKEAWAYS

- + Across all countries, 77% of executives say their company is effective at using employee insights to make EX improvements.
- + French executives are most likely to say that their company is ineffective at using employee insights to create EX improvements, at 18%.
- + Japanese executives are least likely to say that their company is effective at using employee insights to make improvements in their employees' work experiences.

## ABOUT

This chart shows how effective executives from each country believe their organization is at using insights about how employees are thinking and feeling to make employee work experience improvements.

## How effective is your company at using insights about how employees are thinking & feeling to make improvements in employees' work experiences?



Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

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# XM Capabilities: Overview

## KEY TAKEAWAYS

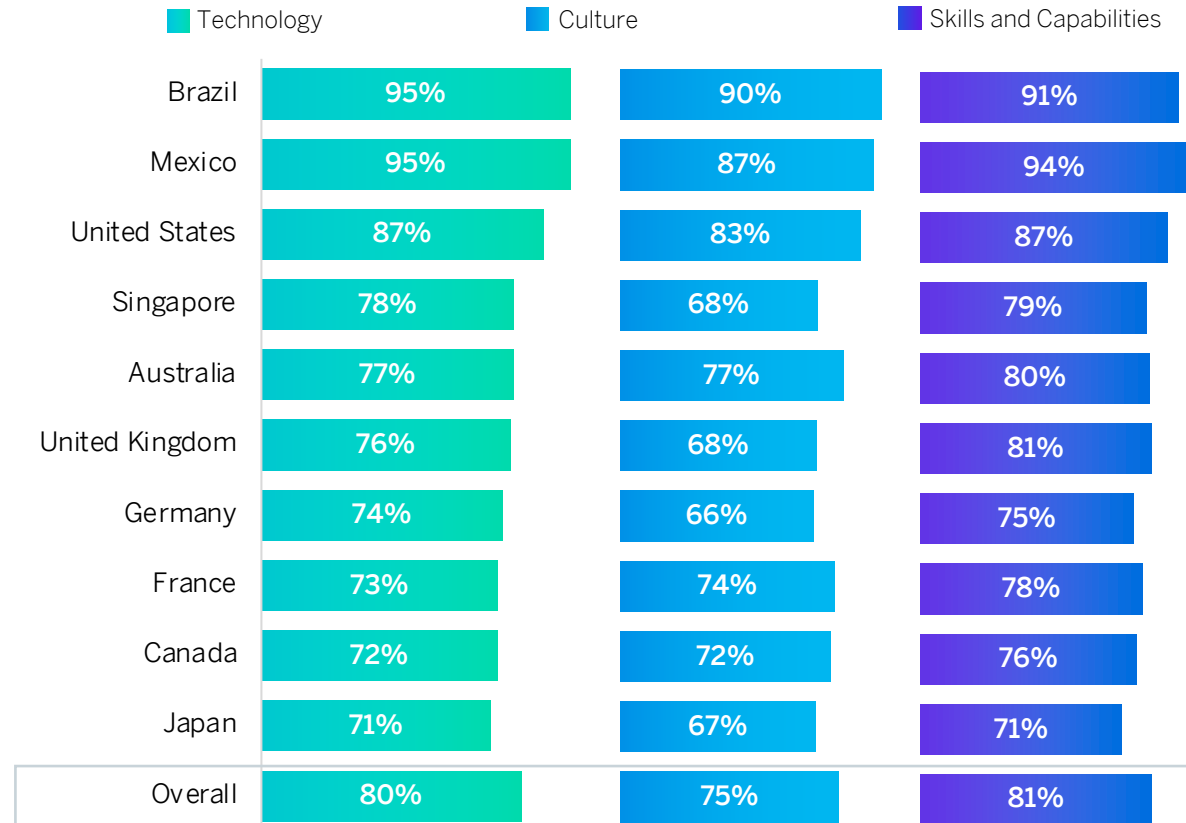
- + Across all countries, executives are less likely to report strong ability in their XM culture (75%) than in their technology (80%) or skills and capabilities (81%).
- + Brazilian executives are most confident in their XM capabilities, with 95% and 90% saying they have strong technology and culture capabilities, respectively; the highest across all countries.
- + Japanese executives are least likely to say their XM capabilities are strong across all three areas.

## ABOUT

These charts show the percentage of executives that say they have “strong” or “very strong” executive management capabilities in these three areas.

## XM Capability Strength

(% of executives reporting “strong” or “very strong” capabilities)



# XM Capability: Technology

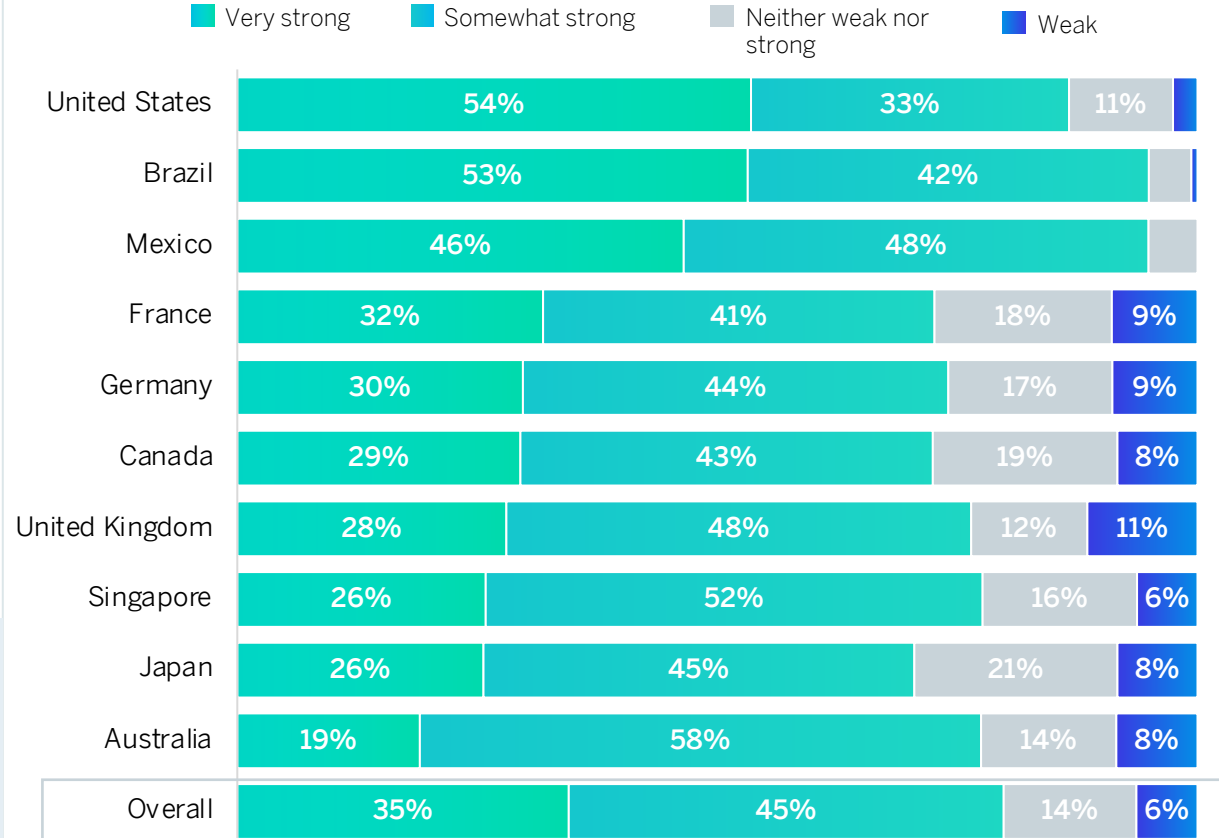
## KEY TAKEAWAYS

- + Overall, 80% of executives say their organization's technological capabilities enabling XM are "somewhat" or "very" strong.
- + American executives are most likely to say that their organization's technological XM abilities are "very strong", at 54%.
- + Japanese executives are least likely to say that their organization's technological abilities enabling XM are "somewhat" or "very" strong.

## ABOUT

This chart shows how strong executives from each country say that their organization's technology capabilities are for enabling good XM to scale.

### How strong are your organization's technological capabilities that enables good XM to scale across the organization?



Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

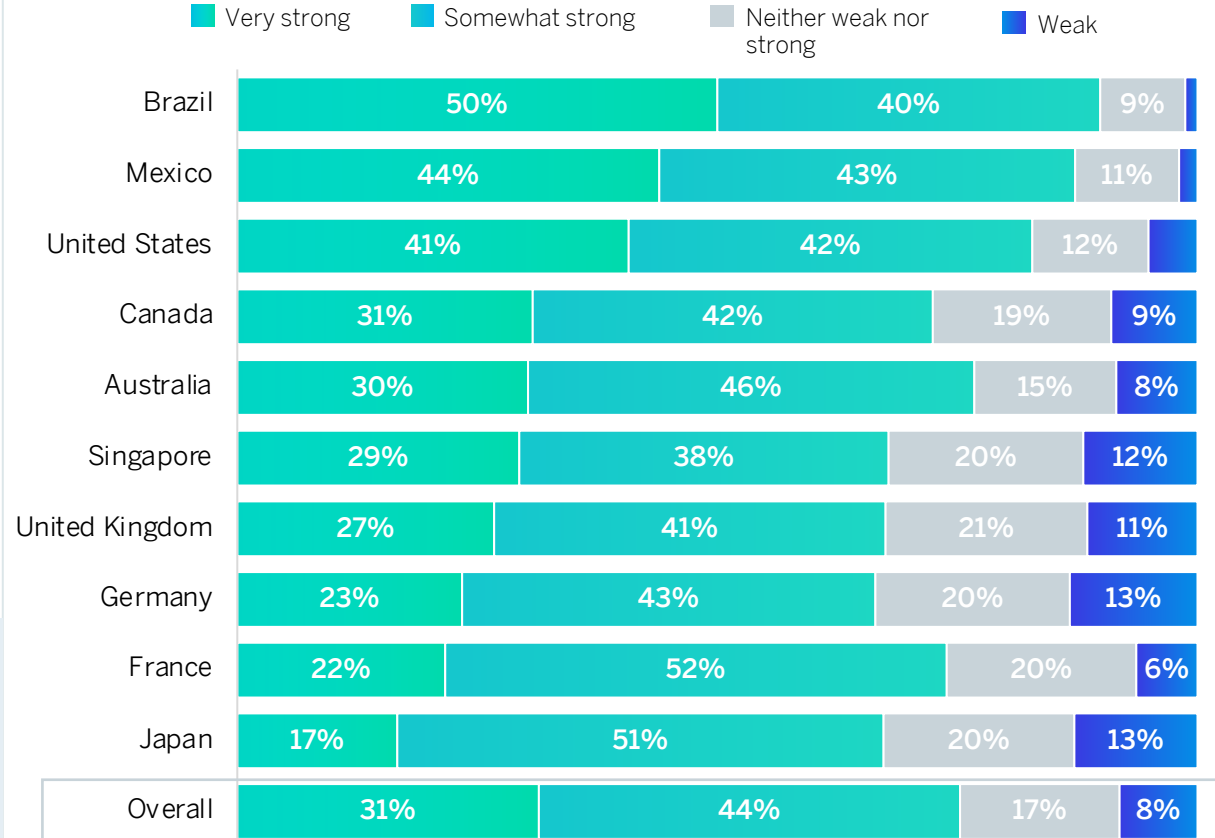
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# XM Capability: Culture

## KEY TAKEAWAYS

- + Overall, 75% of executives say their organizational culture encouraging good XM practices is “somewhat” or “very” strong.
- + German executives are least likely to say their organizational XM culture is “somewhat” or “very” strong, at 66%.
- + Brazilian executives most frequently say their organizational XM culture is strong, at 90%.

### How strong is your organizational culture that encourages good XM practices to flourish across the organization?



## ABOUT

This chart shows how strong executives from each country say their organization culture is that encourages good XM practices to proliferate across the organization.

Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

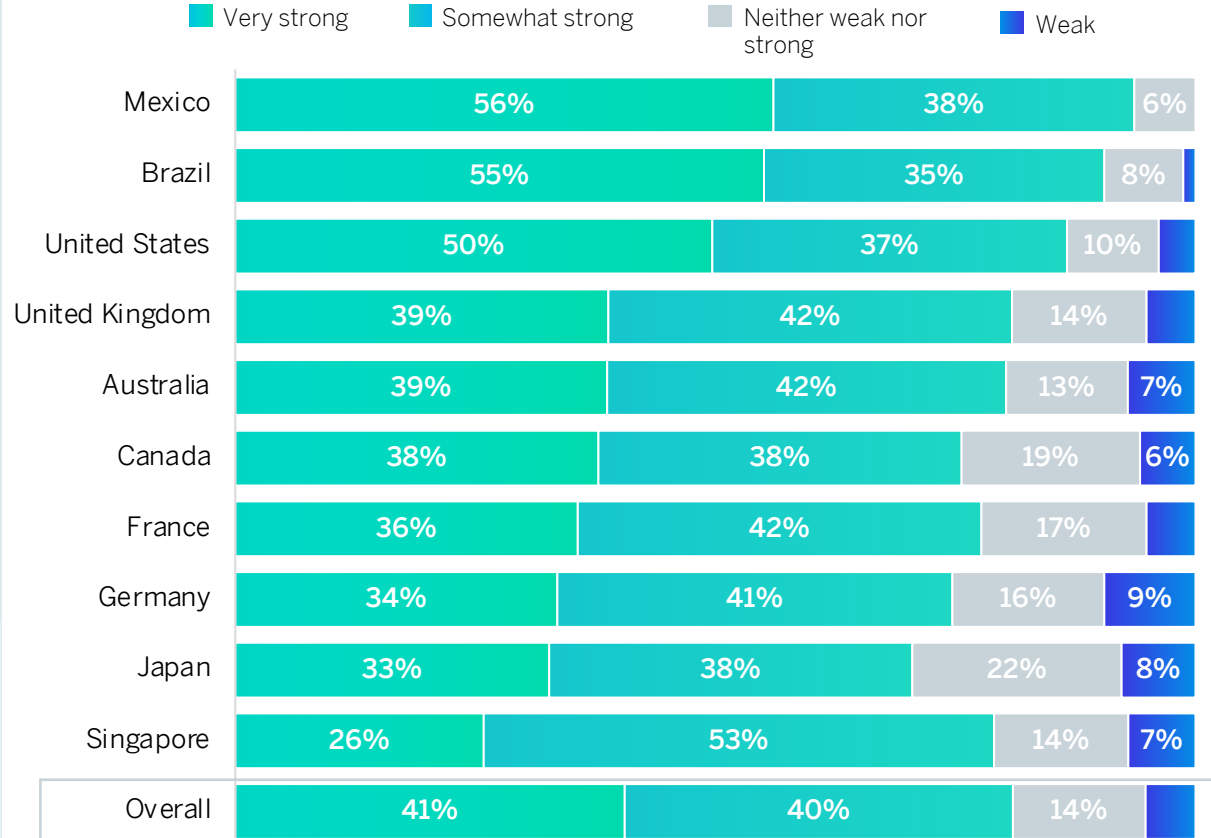
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# XM Capability: Skills and Capabilities

## KEY TAKEAWAYS

- + 81% of executives across all countries say their organization's XM skills and capabilities are strong.
- + No Mexican executives say their organization has weak XM capabilities, while 9% of German executives say the same.
- + Japanese executives say their organization's XM skills and capabilities are strong least frequently, at 71%.

## How strong are your organization's skills and capabilities to propel good XM practices throughout the organization?



## ABOUT

This chart shows how strong executives from each country say their organization's skills and capabilities are in propelling good XM practices across the organization.

# Obstacles: Overall

## KEY TAKEAWAYS

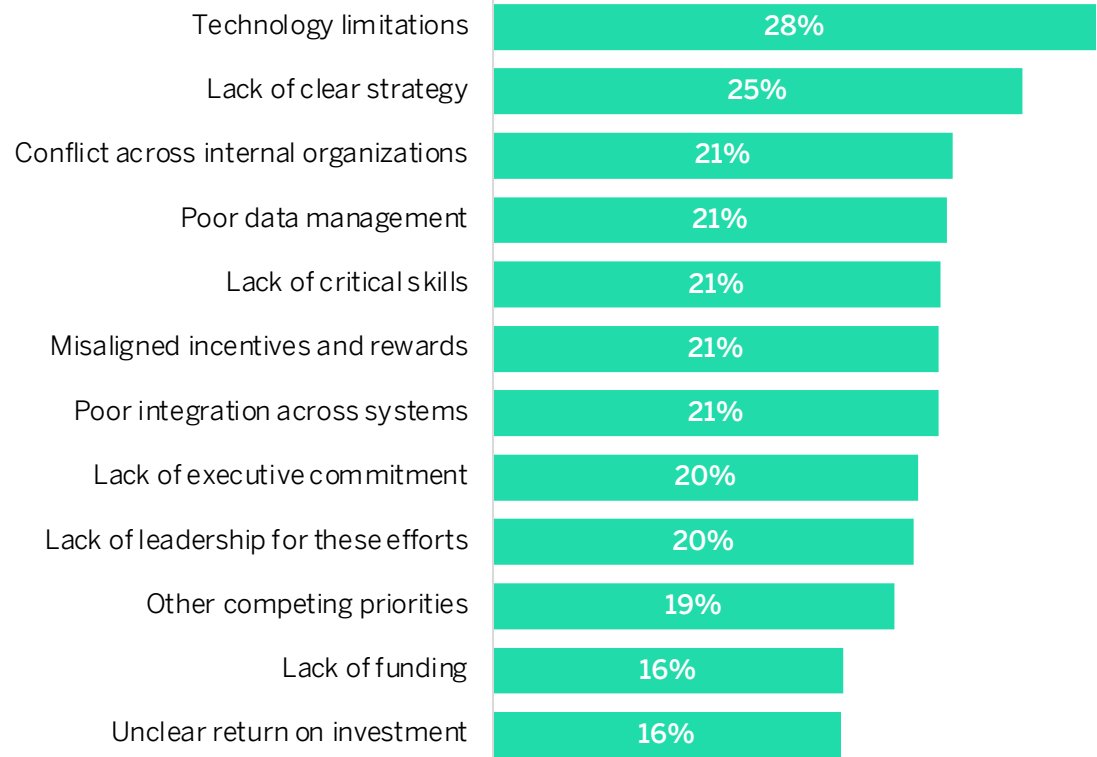
- + Looking across all countries, technology is the top obstacle to XM, selected by 28% of executives.
- + The least frequently cited obstacles to XM efforts were “lack of funding” and “unclear ROI”, with 16% of executives selecting each option.
- + Just 10% of executives did not consider any of these as obstacles to their organization’s XM efforts.

## ABOUT

This chart shows the percentage of executives that say each item is an obstacle to their organization’s XM efforts.

### Which of these do you consider to be significant obstacles to your organization’s Experience Management efforts?

(Select all that apply)



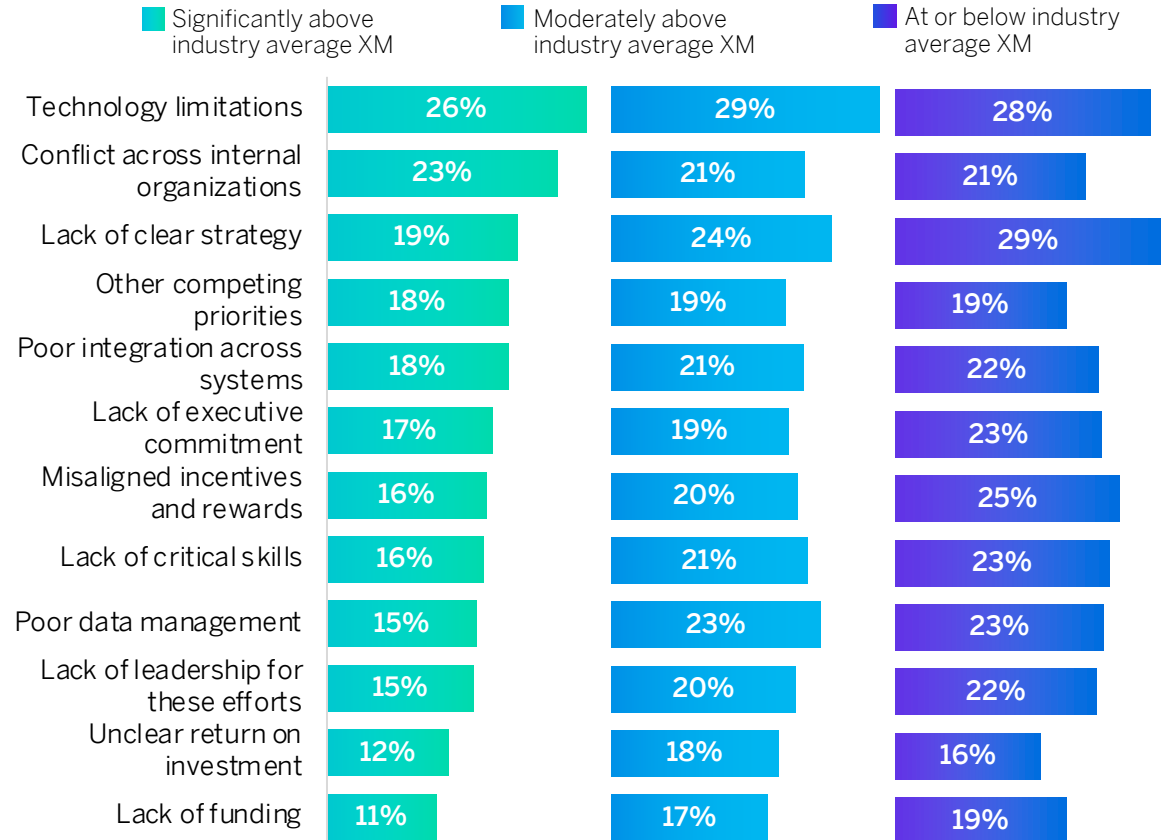
# Obstacles: By XM Performance Levels

## KEY TAKEAWAYS

- + Executives reporting significantly above average XM most frequently say that “technology limitations” is an obstacle to their XM success, which was only the 10<sup>th</sup> on the list for organizations with average or below average XM abilities.
- + Executives reporting moderately above-average or below-average XM abilities were most likely to cite “lack of clear strategy” as an obstacle to their organization’s XM efforts.

### Obstacles to XM Efforts

(by XM Performance Self-Assessment)



## ABOUT

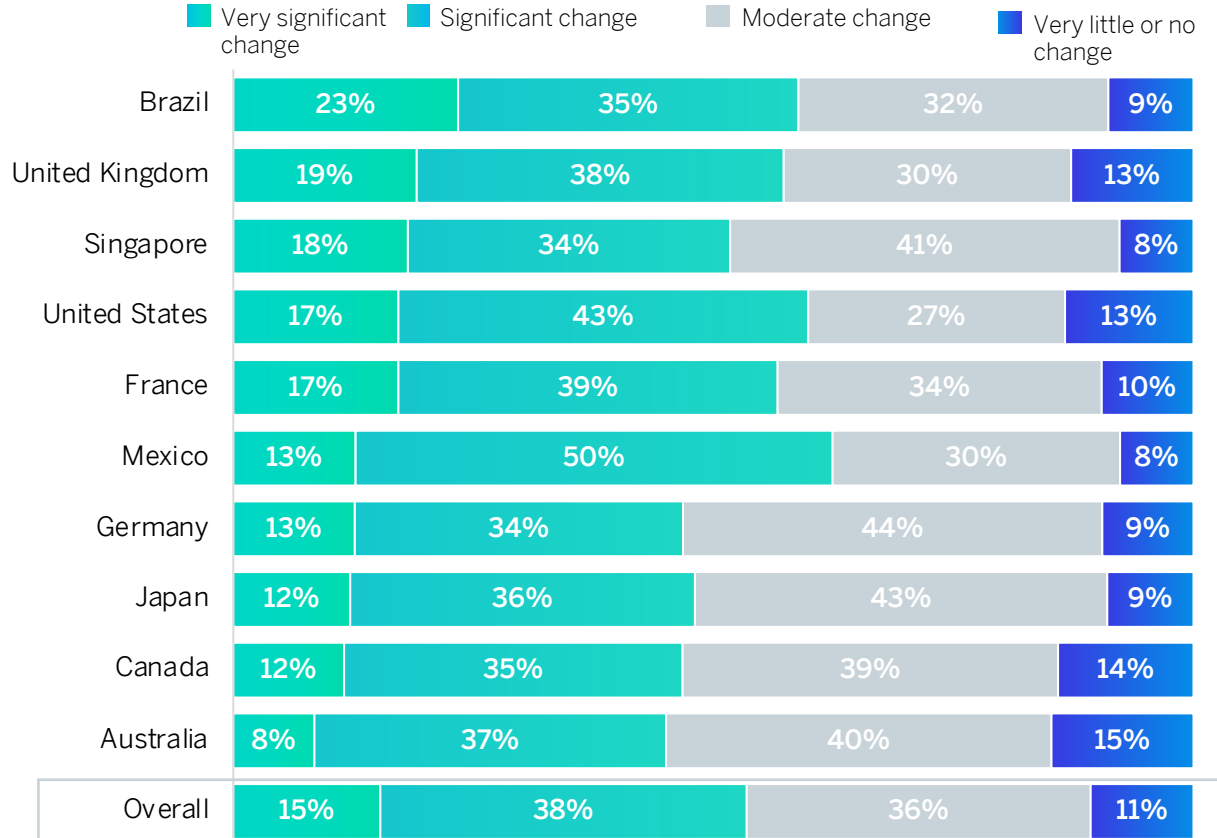
These charts show the percentage of executives that cite each item as an obstacle to their organization’s XM efforts according to their XM performance self-assessment.

# Looking Ahead: Customer Interactions

## KEY TAKEAWAYS

- + Overall, 53% of executives say their organization will need to make significant adjustments to how it interacts with customers, which is five times the number of executives who expect little or no change.
- + Mexican executives report the most momentum for change, with 63% of executives saying their organization needs to make significant changes in customer interactions.
- + Australian executives are least likely to say that their organization needs to make any adjustments, but those who expect significant change outnumber those who expect little or no change by three to one.

## Thinking about the next year or two, to what degree do you feel that your organization will need to adjust how it interacts with customers?



## ABOUT

This chart shows how significantly executives from each country believe their organization needs to adjust its interactions with customers over the next 1-2 years.

Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

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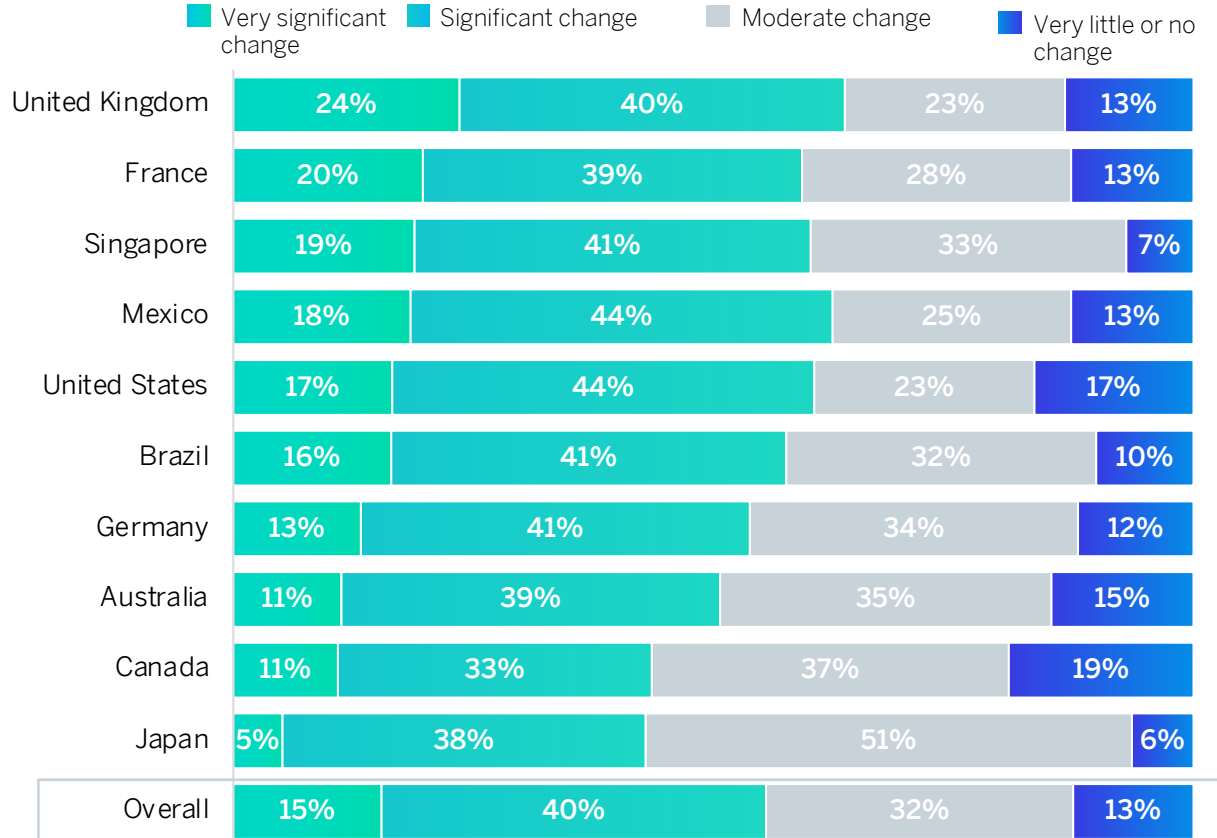


# Looking Ahead: Employee Interactions

## KEY TAKEAWAYS

- + Overall, 55% of executives say their organization needs to make “significant” or “very significant” adjustments to its employee interactions which is four times the number of executives who expect little or no change.
- + UK executives report the most momentum for change, with 64% of executives saying their organization needs to make significant changes in employee interactions.

### Thinking about the next year or two, to what degree do you feel that your organization will need to adjust how it interacts with employees?



## ABOUT

This chart shows how significantly executives from each country believe their organization needs to adjust its interactions with employees over the next 1-2 years.

Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

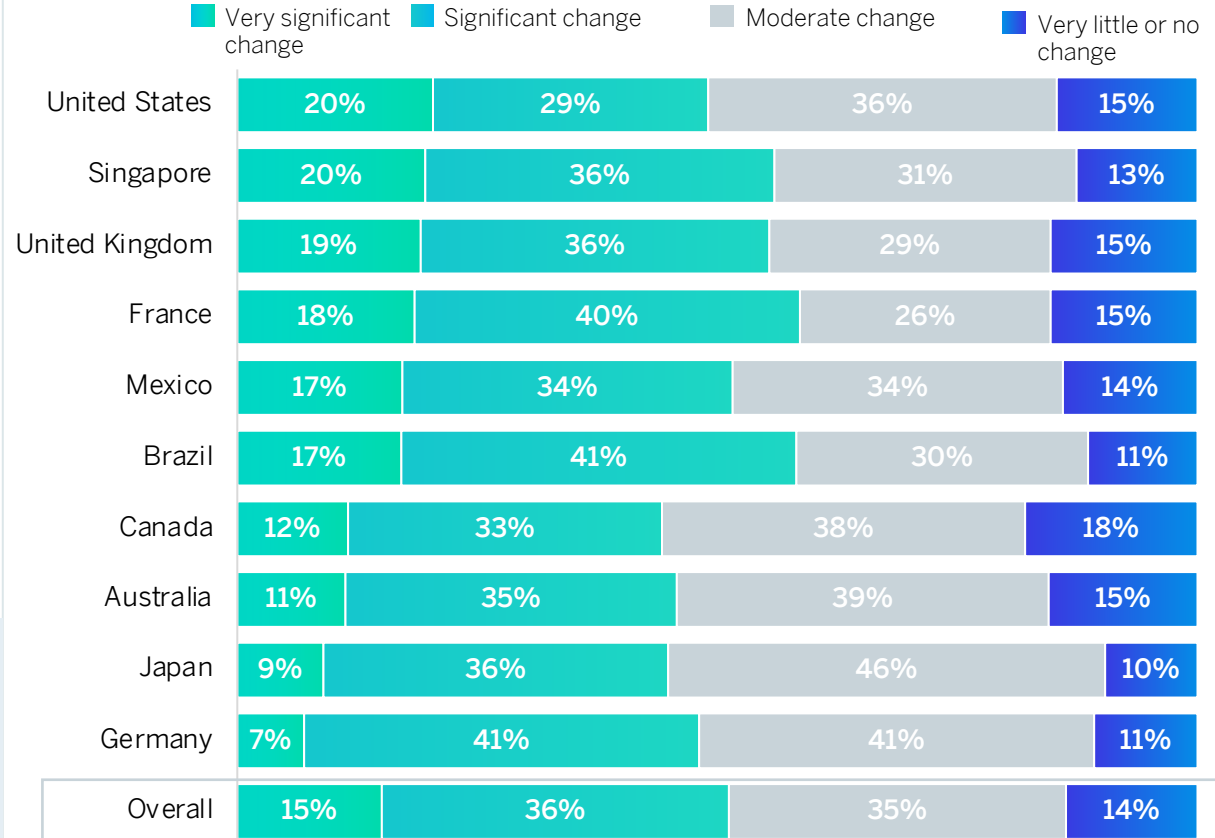
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# Looking Ahead: Products and Services

## KEY TAKEAWAYS

- + Overall, 51% of executives say their organization needs to make “significant” or “very significant” adjustments to its products and services, which is three and a half times the number of executives who expect little or no change.
- + French and Brazilian companies feel the most need to “very significantly” or “significantly” adjust their offerings to customers.

### Thinking about the next year or two, to what degree do you feel that your organization will need to adjust the products and services that it offers?



## ABOUT

This chart shows how much executives from each country feel that their organization will need to change the products and services it offers to its customers in the next 1-2 years.

Base: 1541 executives across 10 countries  
Source: Qualtrics XM Institute Q4 2021 XM Executives Study

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## DATA CALCULATION

In **Figures 1, 3, 5-6, 8-10, and 11-15**, the “overall” numbers were calculated by dividing the total number of respondents choosing each option by the total number of survey respondents.

In **Figures 2 and 12**, respondents' answers are broken down by their XM performance self-assessment, in which they responded to the question: “How would you rate your organization's current Experience Management capabilities?”.

### AUTHORS

Bruce Temkin, CCXP, XMP – Head of Qualtrics XM Institute  
Moira Dorsey, XMP – XM Catalyst  
Talia Quaadgras – Senior Research Associate

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