



DATA SNAPSHOT

Global Study: ROI of Customer Experience

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our latest global consumer study, consumers from 24 countries rated their recent experiences with 17 industries on a satisfaction scale of 1-5 stars and told us how likely they are to trust, recommend, and purchase more after that experience. From their responses, we examined the ROI of customer experience. Our analysis found that:

- + **Consumer satisfaction impacts key loyalty behaviors.** Satisfaction has a very strong correlation with consumers' likelihood to trust, recommend, and purchase more.
- + **Consumer likelihood to recommend is most impacted by consumer satisfaction.** Compared to after a 1-2- star experience, after a 5- star experience consumers are 3.6x more likely to recommend, 3.3x more likely to trust, and 2.6x more likely to purchase more.
- + **The impact of satisfaction on loyalty metrics varies by country.** Chinese consumers' likelihood to trust, recommend, and purchase more increases the least (1.7x) after a 5- star satisfying experience compared to after an unsatisfying experience. Comparatively, Germans' likelihood to recommend increases by 6.3x, Spaniards' likelihood to trust increases by 5.2x, and Italians' likelihood to purchase more increases by 3.6x.
- + **Unsatisfying experiences impact government agencies' loyalty metrics the most.** Across all industries, consumers are least likely to trust, recommend, and purchase more from a government agency after a 1-2- star experience. Consumers that had an unsatisfying experience with a supermarket are most likely to recommend and purchase more.
- + **Banks struggle the most with loyalty after satisfying experiences.** After 3-5- star experiences, banking consumers are least likely to recommend and purchase more from banks. Just 64% of banking consumers expect to purchase more after a 5- star experience, compared to 86% of online retail customers.

STUDY KEY FACTS

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

Global Study: ROI of Customer Experience

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

ROI: CX Correlates with Trust

KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.77, there is a very high correlation between customer experience (CX) and likelihood to trust.

**Industry satisfaction rates within each country
correlate with likelihood to trust rates**
24 countries across 17 industries, 385 data points



ABOUT

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

Base: 24,000 consumers across 24 countries

Source: Qualtrics XM Institute Q3 2021 Global Consumer Trends Study

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ROI: CX Correlates with Recommending

KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.86, there is a very high correlation between customer experience (CX) and likelihood to recommend.

ABOUT

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

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

24 countries across 17 industries, 385 data points



Base: 24,000 consumers across 24 countries

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ROI: CX Correlates with Purchasing More

KEY TAKEAWAYS

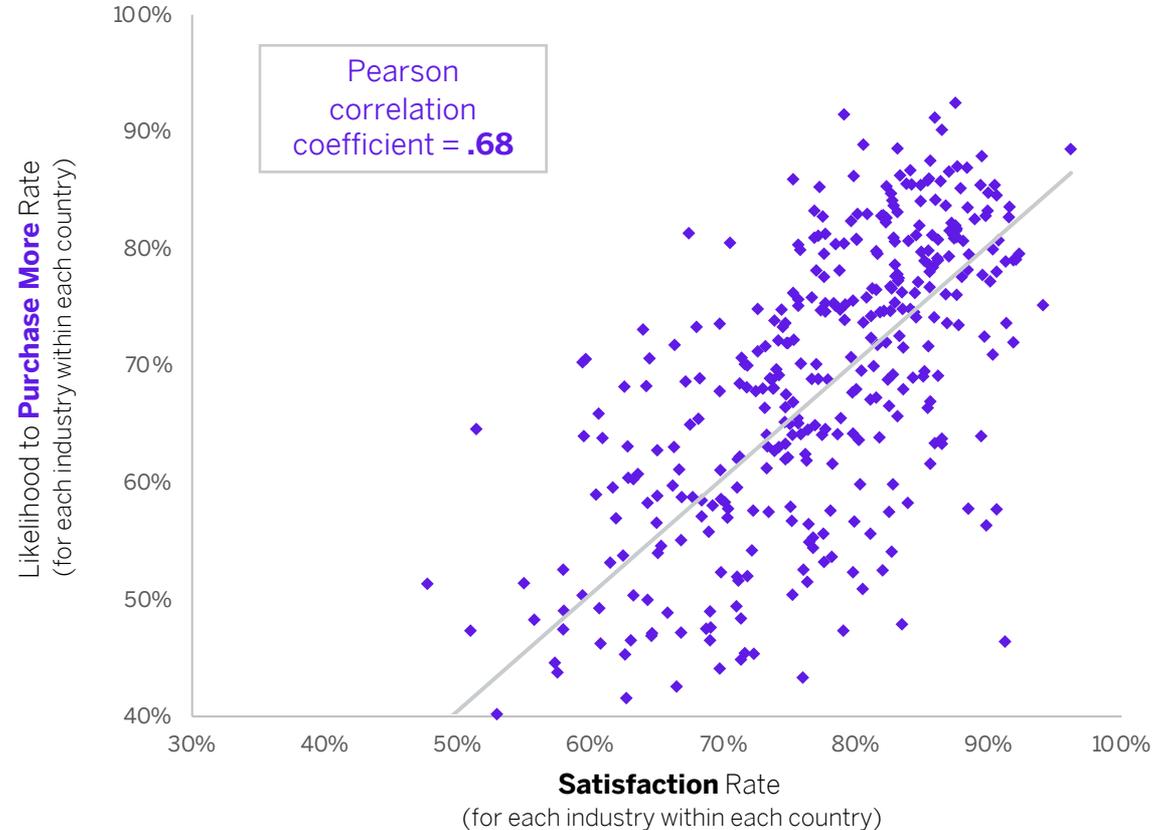
- + With a Pearson correlation coefficient of 0.68, there is a high correlation between customer experience (CX) and likelihood to purchase more.

ABOUT

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

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

24 countries across 17 industries, 385 data points



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CX and Loyalty Connections – Overall

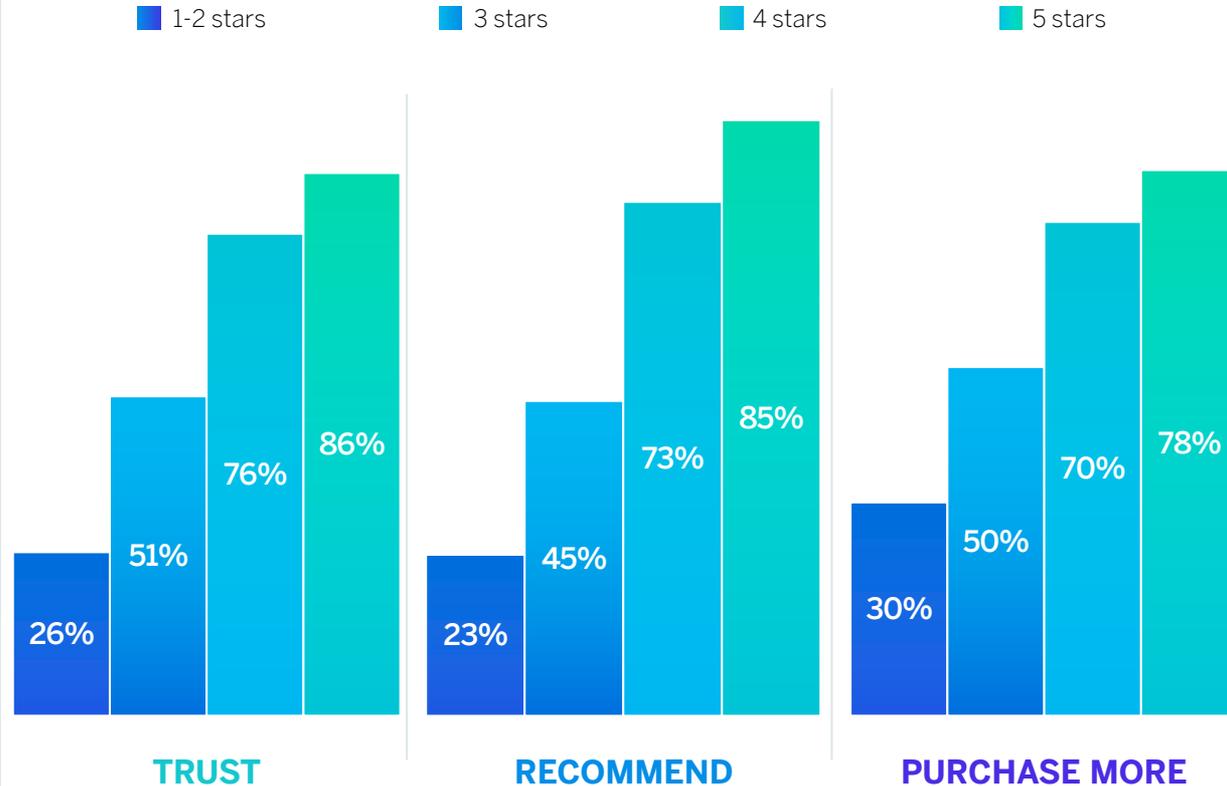
KEY TAKEAWAYS

- + There is a **60**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **62**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.6x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

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CX and Trust Connections – by Industry

KEY TAKEAWAYS

- + Consumers are most likely to trust department stores after a 1-3- star experience, and most likely to trust hospitals and medical clinics after a 4-5- star experience.
- + Consumers are least likely to trust government agencies after a very negative experience and are least likely to trust online retailers and mobile phone providers after middling experiences.
- + Internet service providers garner the least trust from consumers after a 5- star satisfactory experience.

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

 Lowest Trust Rate  Highest Trust Rate

	1-2 stars	3 stars	4 stars	5 stars
Airline	30%	55%	77%	87%
Bank	27%	47%	75%	85%
College/ University	31%	57%	79%	85%
Credit Card Provider	24%	50%	75%	87%
Department Store	36%	59%	79%	87%
Fast Food	33%	48%	73%	83%
Government Agency	19%	49%	76%	84%
Health Insurance	24%	56%	80%	89%
Hospital/Medical Clinic	33%	58%	83%	89%
ISP	25%	46%	73%	82%
Mobile Phone Provider	21%	45%	74%	84%
Online Retailer	24%	45%	71%	85%
Parcel Delivery	24%	47%	77%	87%
Property Insurance	28%	56%	78%	88%
Public Utility	24%	50%	77%	85%
Streaming	30%	50%	75%	86%
Supermarket	33%	53%	79%	88%

ABOUT

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

CX and Recommend Connections – by Industry

KEY TAKEAWAYS

- + Banking consumers are least likely to recommend after a 3-5- star satisfactory experience.
- + After 1-2- star experiences, consumers are least likely to recommend government agencies and parcel delivery services and are most likely to recommend supermarkets.
- + Consumers are most likely to recommend a streaming service after a 5-star experience.

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars
Airline	27%	50%	78%	86%
Bank	19%	34%	66%	80%
College/ University	30%	54%	75%	85%
Credit Card Provider	19%	41%	72%	84%
Department Store	35%	56%	79%	86%
Fast Food	31%	45%	73%	85%
Government Agency	16%	41%	71%	82%
Health Insurance	23%	53%	76%	88%
Hospital/Medical Clinic	24%	44%	72%	85%
ISP	23%	43%	71%	83%
Mobile Phone Provider	23%	41%	73%	86%
Online Retailer	29%	48%	75%	87%
Parcel Delivery	16%	44%	72%	84%
Property Insurance	29%	54%	77%	87%
Public Utility	20%	42%	69%	81%
Streaming	32%	52%	78%	89%
Supermarket	38%	46%	74%	85%

CX and Purchase More Connections – by Industry

KEY TAKEAWAYS

- + Banks are least likely to have their consumers purchase more after an experience of any star rating.
- + After 1-2- star experiences, consumers are least likely to purchase more from government agencies and banks, and most likely to purchase more from supermarkets.
- + Online retailers are most likely to have customers that purchase more after a 5-star experience.

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

 Lowest Trust Rate  Highest Trust Rate

	1-2 stars	3 stars	4 stars	5 stars
Airline	32%	57%	73%	82%
Bank	21%	33%	55%	64%
College/ University	28%	45%	62%	73%
Credit Card Provider	22%	45%	69%	78%
Department Store	42%	63%	82%	85%
Fast Food	38%	56%	76%	81%
Government Agency	21%	40%	62%	73%
Health Insurance	33%	49%	71%	81%
Hospital/Medical Clinic	28%	42%	58%	68%
ISP	30%	46%	67%	75%
Mobile Phone Provider	29%	48%	69%	75%
Online Retailer	37%	60%	78%	86%
Parcel Delivery	35%	52%	75%	79%
Property Insurance	34%	55%	72%	82%
Public Utility	37%	51%	68%	76%
Streaming	36%	56%	74%	82%
Supermarket	49%	61%	77%	82%

ABOUT

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

CX and Loyalty Connections – Airlines

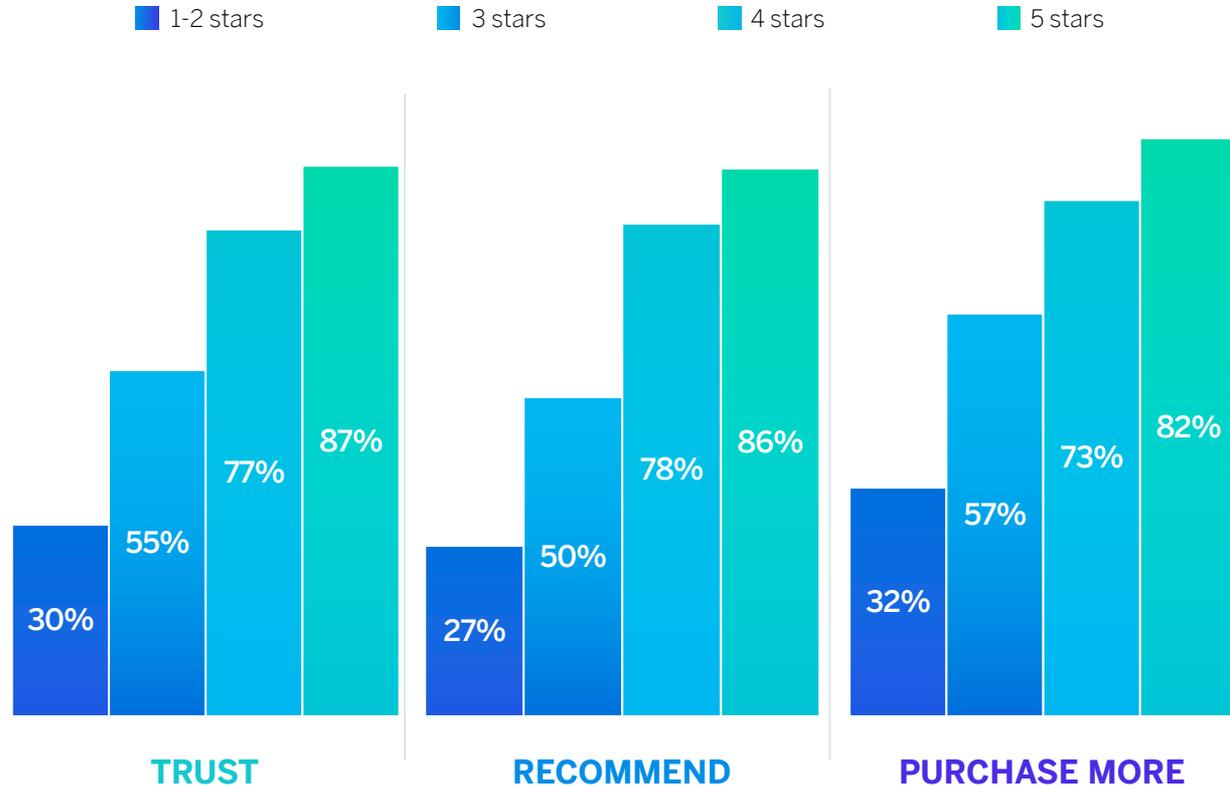
KEY TAKEAWAYS

- + There is a **57**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **59**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

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CX and Loyalty Connections – Banks

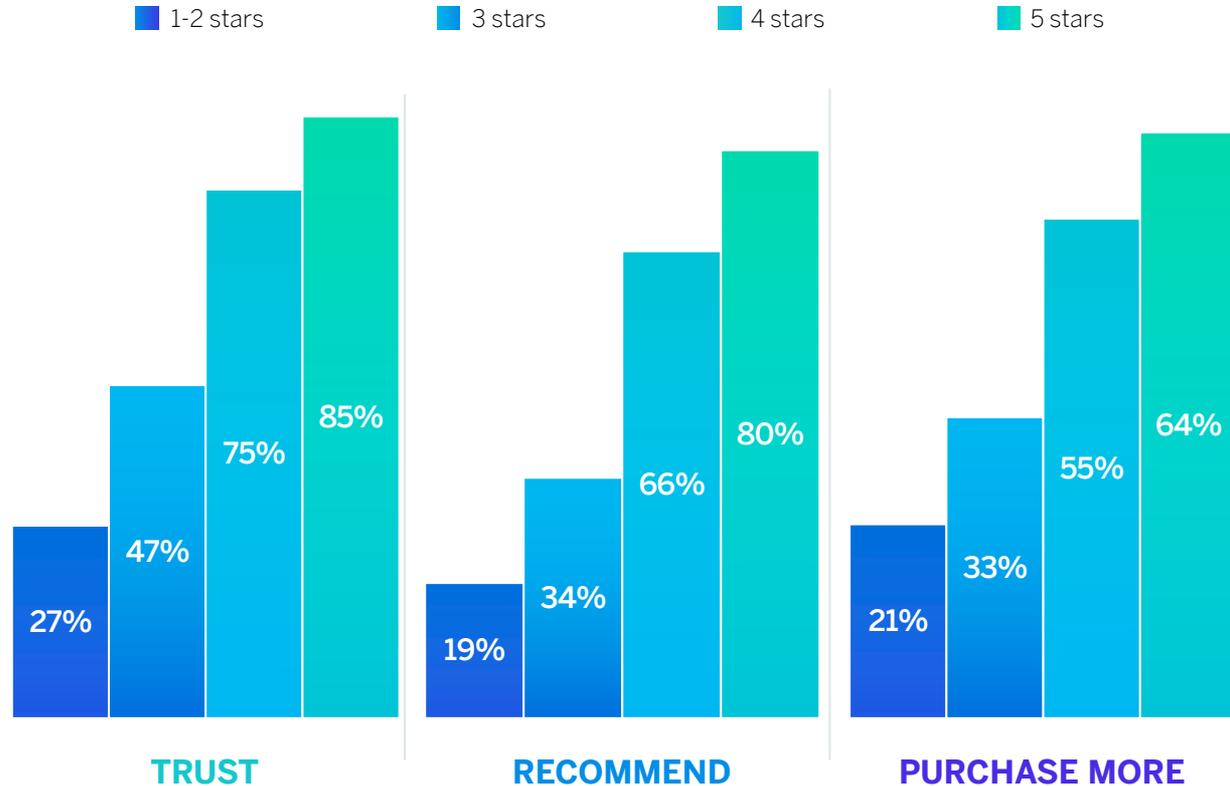
KEY TAKEAWAYS

- + There is a **58**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **61**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

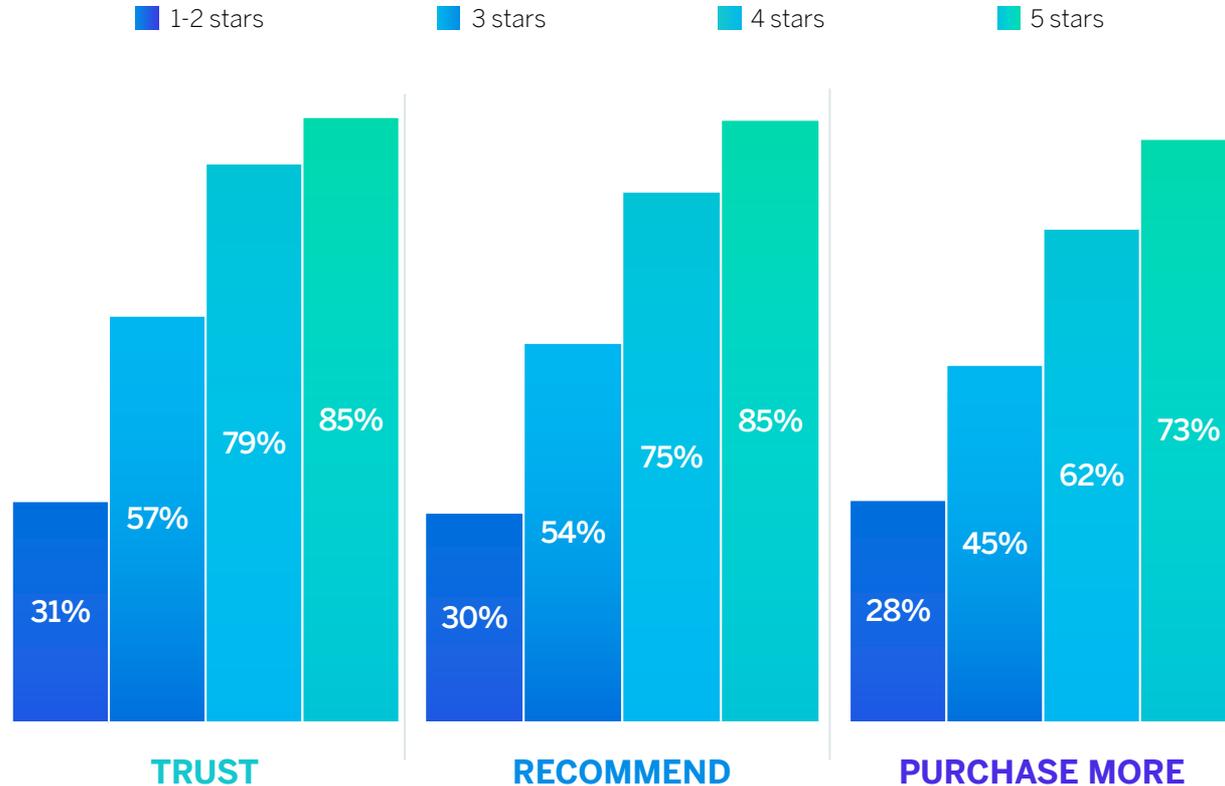
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CX and Loyalty Connections – College/University

KEY TAKEAWAYS

- + There is a **54**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **55**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.6x** as likely to purchase more from a college or university after a 5-star experience compared to a 1- or 2-star experience.

College/University consumers who say they are “somewhat” or “very” likely to:
(out of 1- to 5-star satisfaction ratings)



ABOUT

The top of this chart shows, across all countries, the correlation between an individual’s likelihood to trust, recommend, or purchase more from colleges/universities and their satisfaction levels with a recent college/university experience. The bottom of this chart shows the percentage of consumers who said they are “somewhat” or “very” likely to trust, recommend, or purchase more according to their satisfaction ratings.

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CX and Loyalty Connections – Credit Card Providers

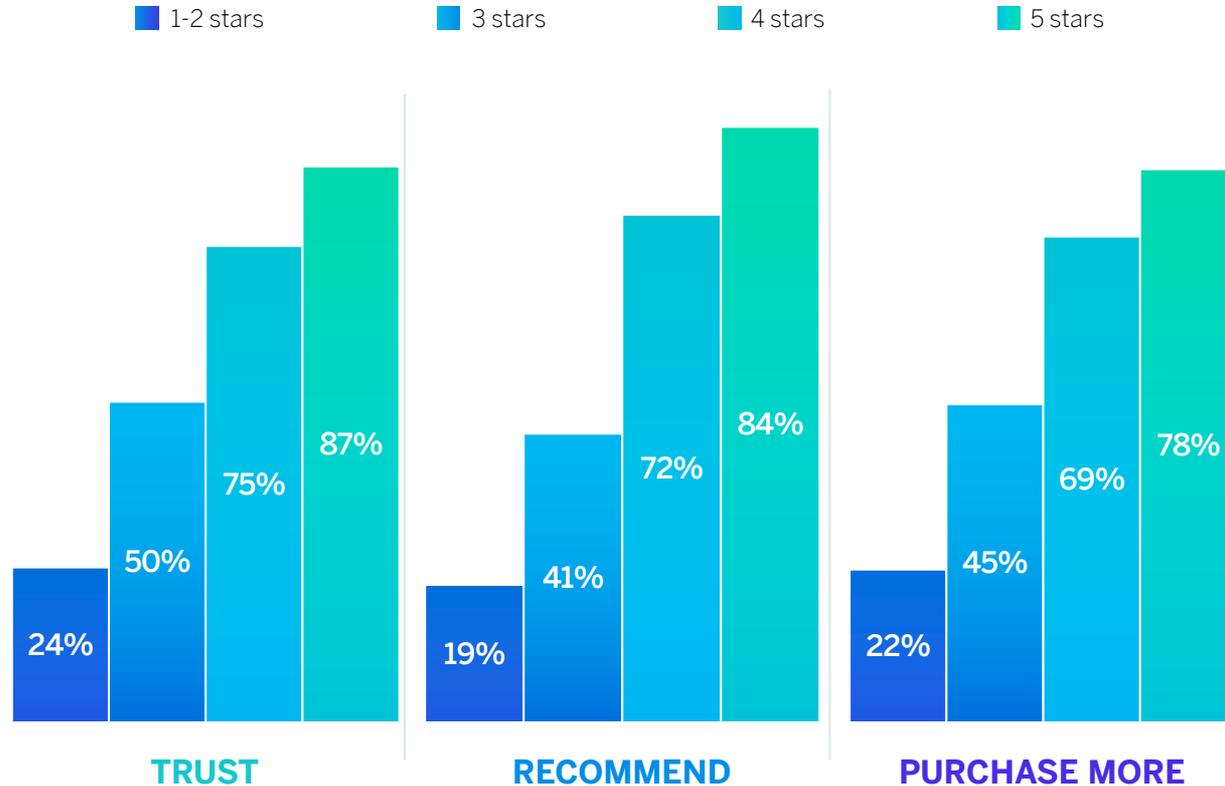
KEY TAKEAWAYS

- + There is a **63**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **65**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.6x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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CX and Loyalty Connections – Department Stores

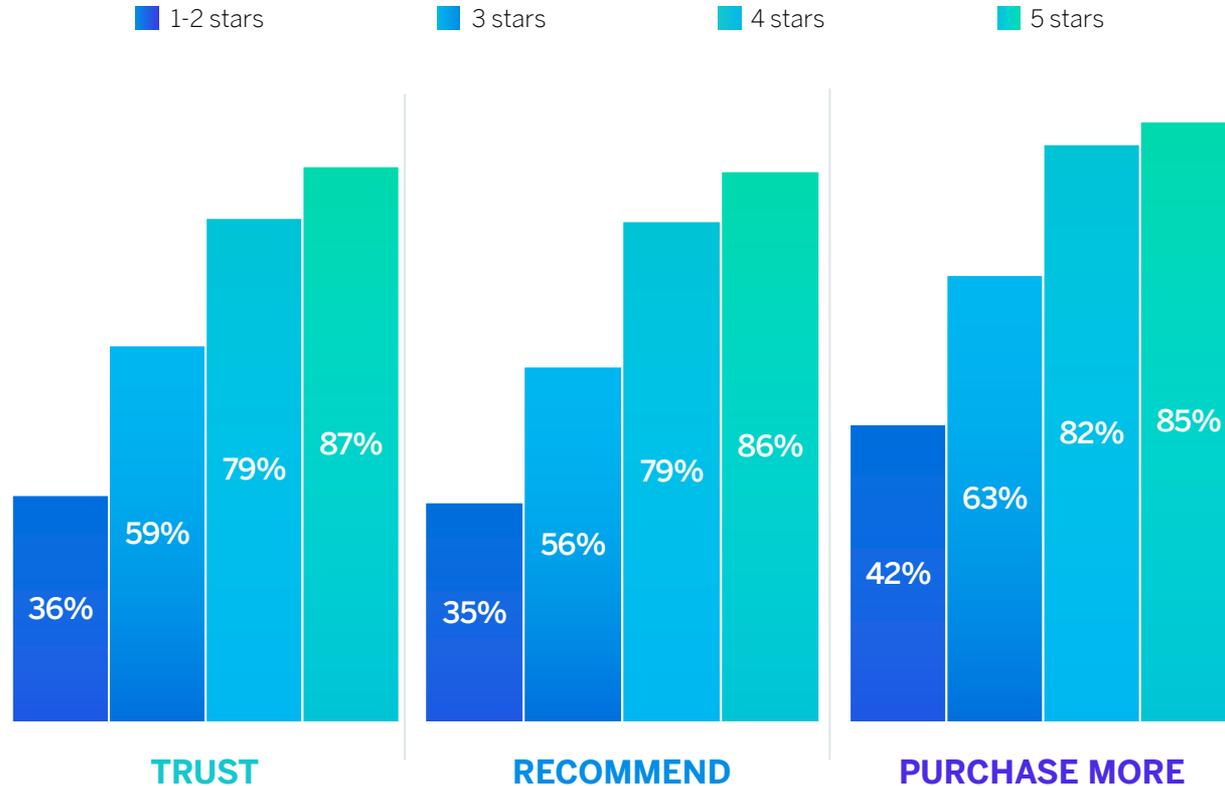
KEY TAKEAWAYS

- + There is a **51**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **51**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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CX and Loyalty Connections – Fast Food

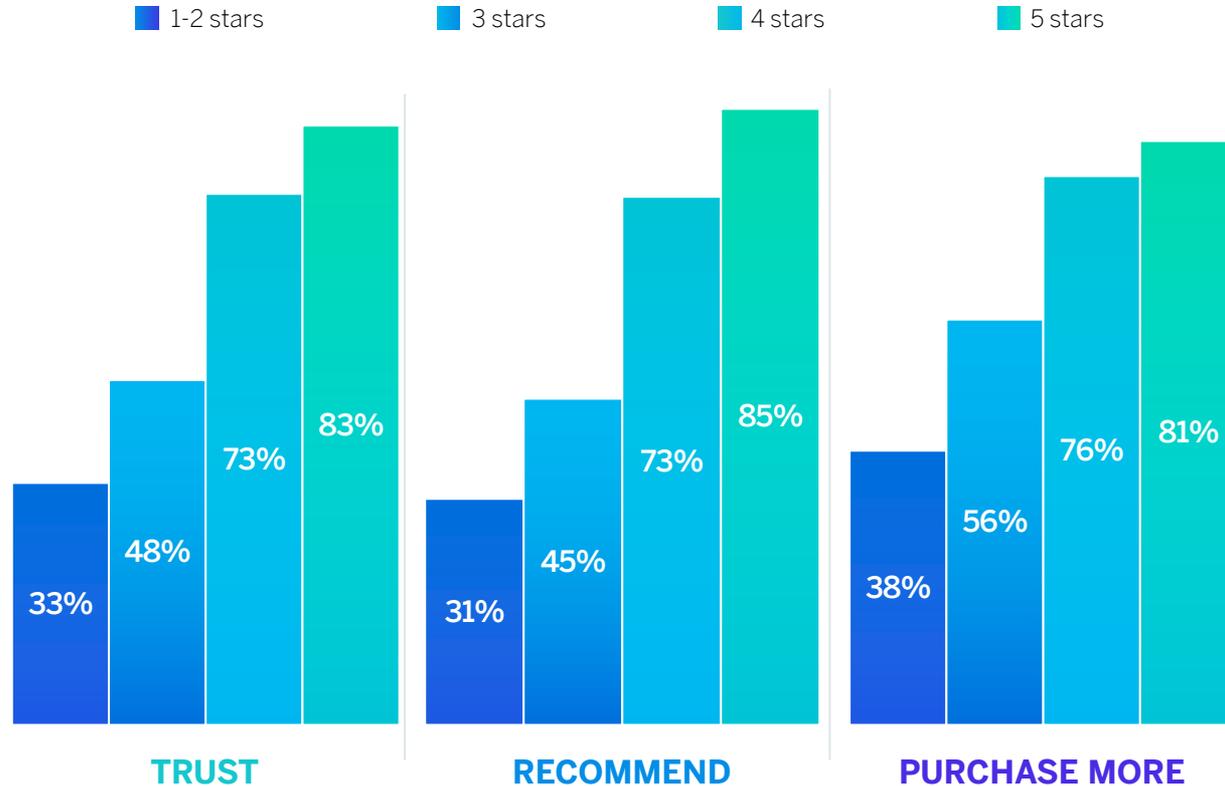
KEY TAKEAWAYS

- + There is a **50**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **54**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.1x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



Base: 24,000 consumers across 24 countries
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CX and Loyalty Connections – Government Agency

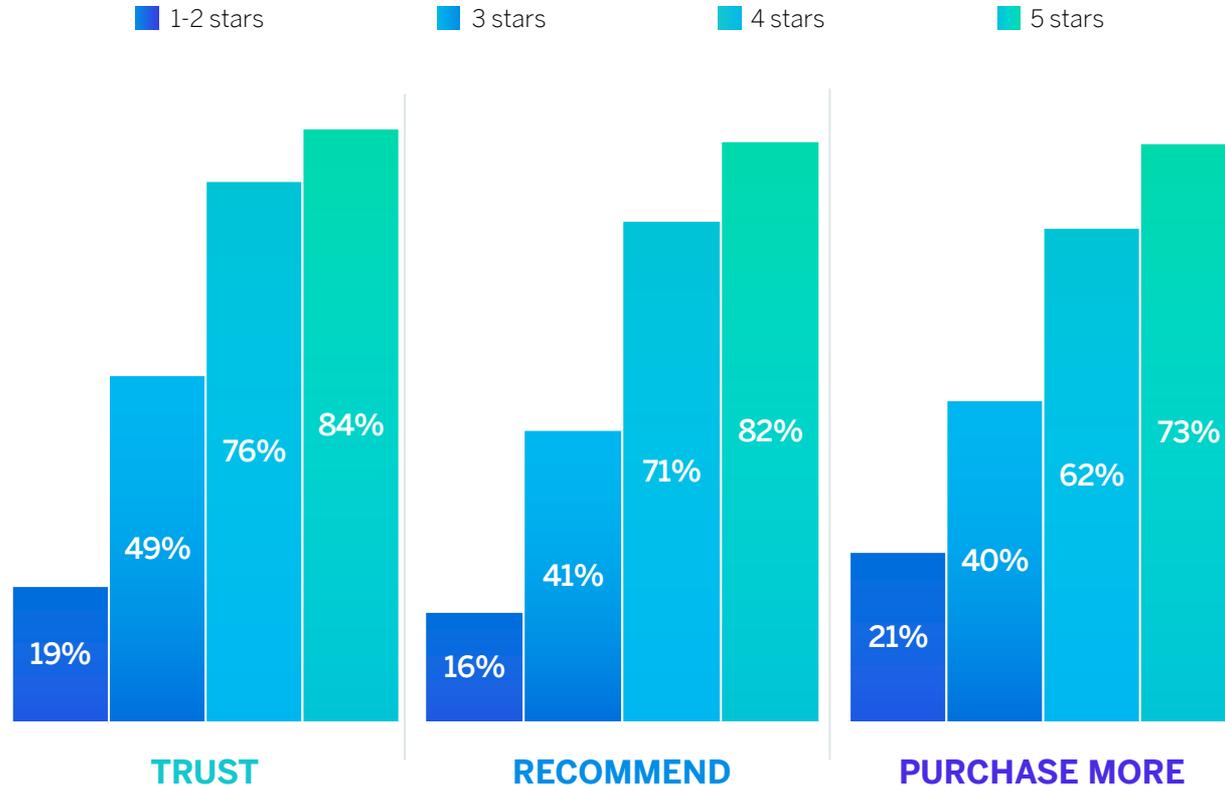
KEY TAKEAWAYS

- + There is a **65**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **66**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.5x** as likely to purchase more from a government agency after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



Base: 24,000 consumers across 24 countries
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CX and Loyalty Connections – Health Insurance

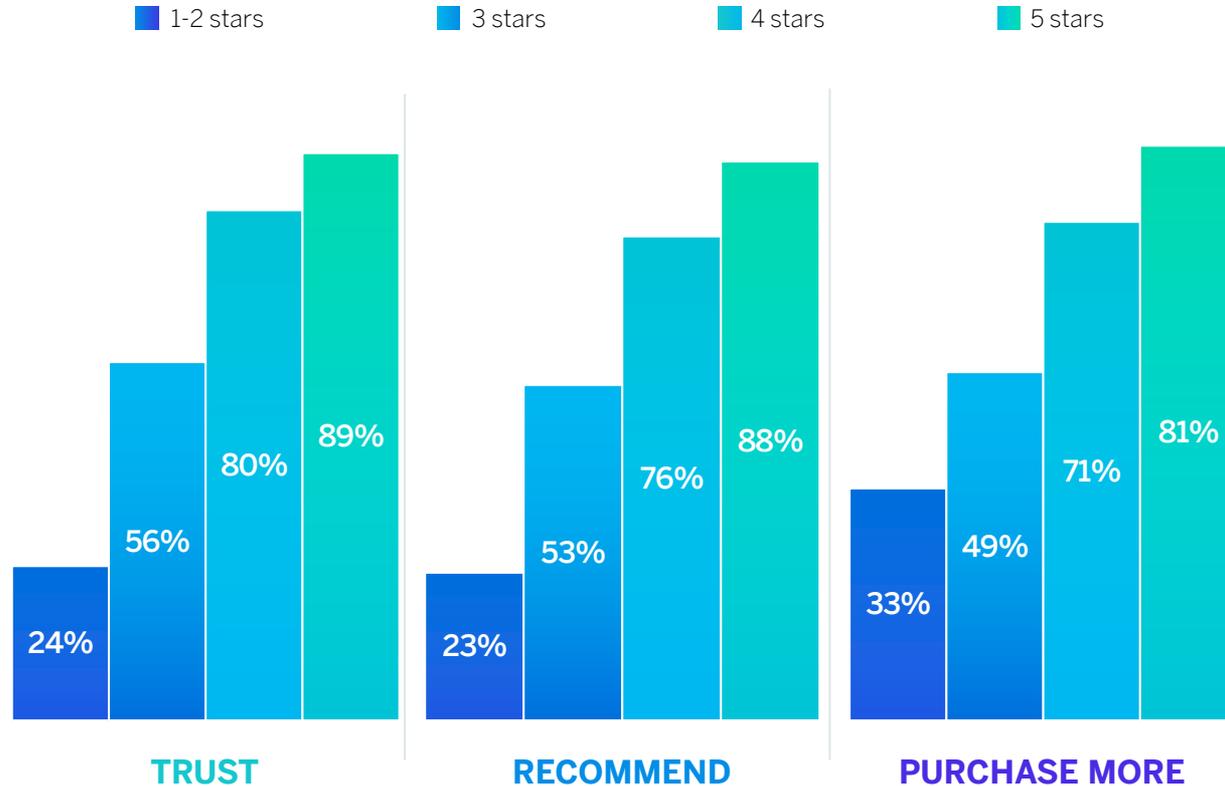
KEY TAKEAWAYS

- + There is a **65**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **65**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

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CX and Loyalty Connections – Hospital/Medical Clinic

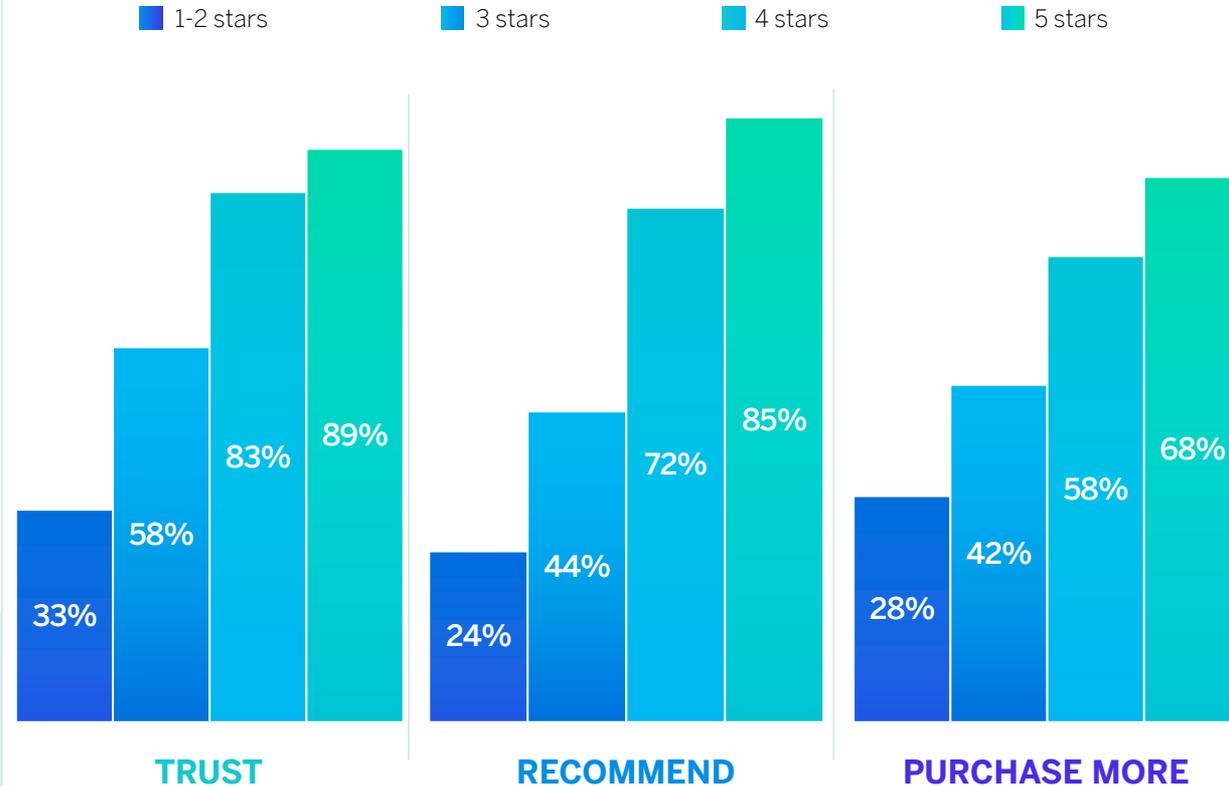
KEY TAKEAWAYS

- + There is a **56**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **61**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.4x** as likely to purchase more from a hospital or medical clinic after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

Hospital/medical clinic consumers who say they are "somewhat" or "very" likely to:
(out of 1- to 5-star satisfaction ratings)



CX and Loyalty Connections – Internet Service Providers

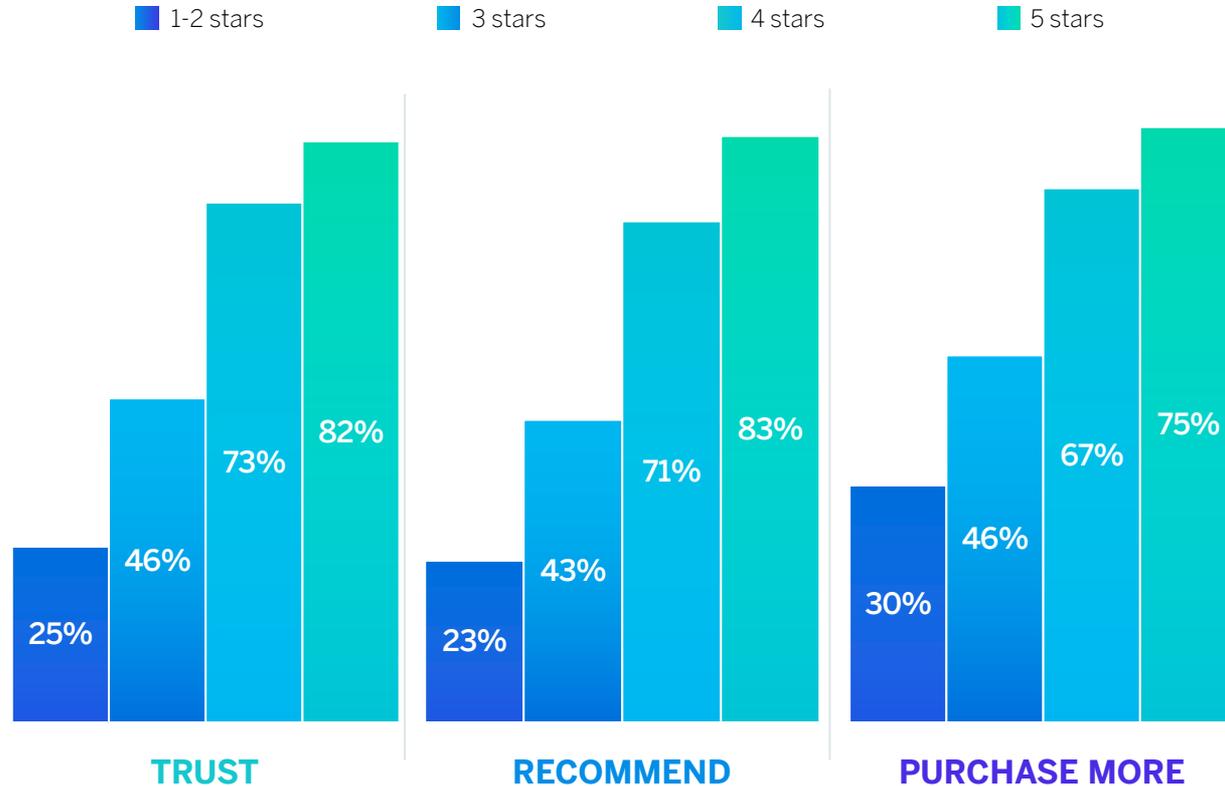
KEY TAKEAWAYS

- + There is a **57-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **60-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Mobile Phone Providers

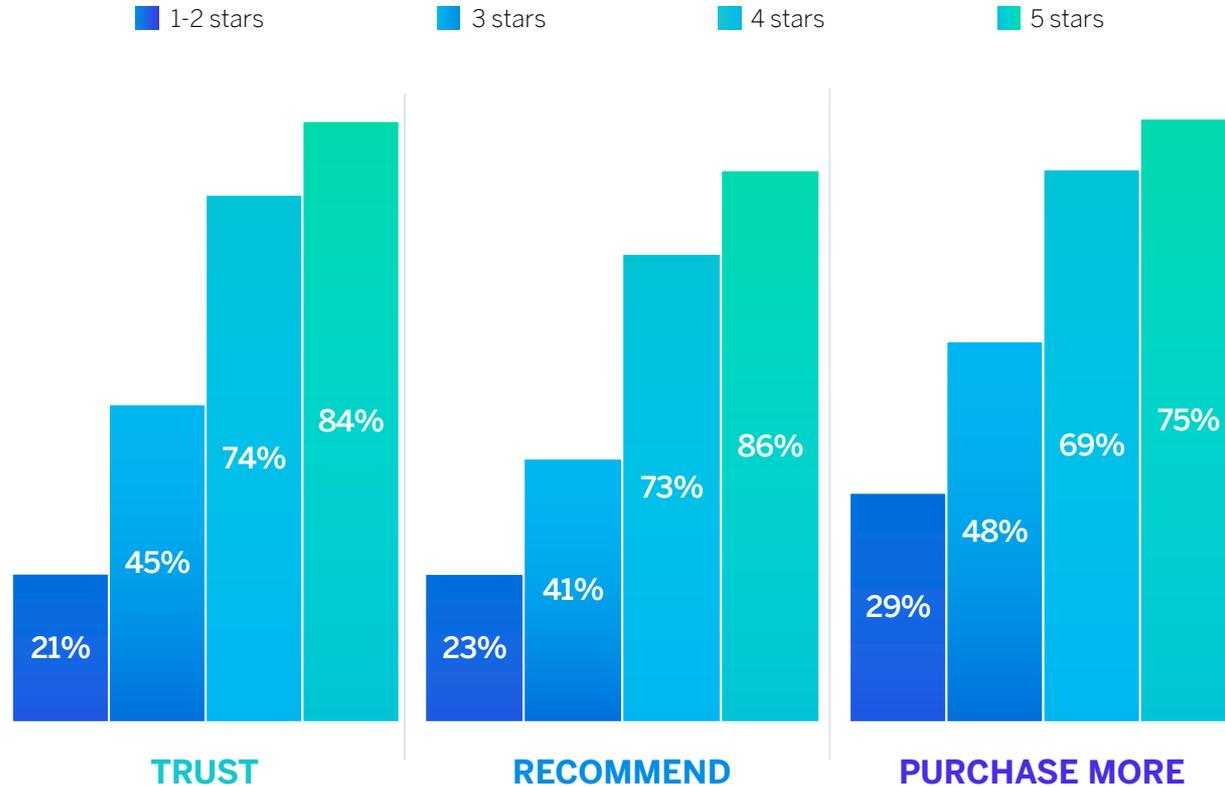
KEY TAKEAWAYS

- + There is a **63**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **63**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.6x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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

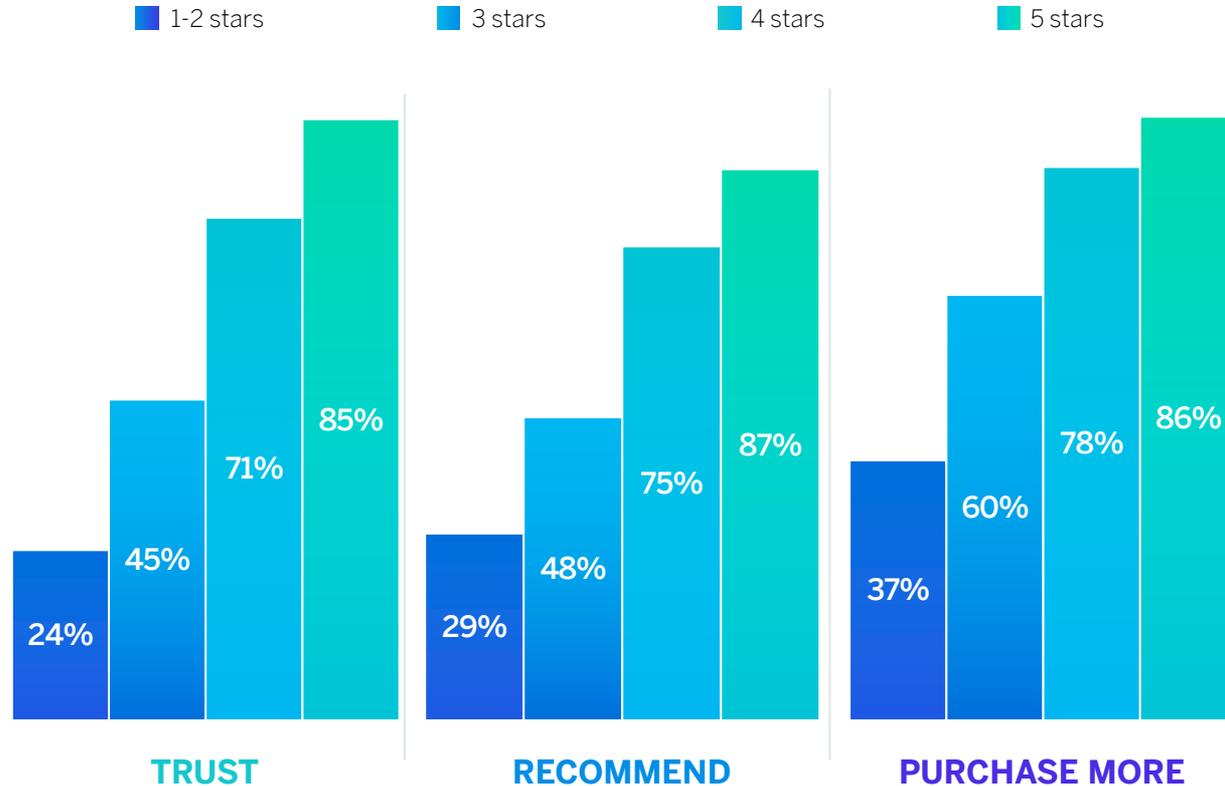


CX and Loyalty Connections – Online Retailer

KEY TAKEAWAYS

- + There is a **61**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

Online retail consumers who say they are “somewhat” or “very” likely to: (out of 1- to 5-star satisfaction ratings)



ABOUT

The top of this chart shows, across all countries, the correlation between an individual's likelihood to trust, recommend, or purchase more from online retailers and their satisfaction levels with a recent online retail experience. The bottom of this chart shows the percentage of consumers who said they are “somewhat” or “very” likely to trust, recommend, or purchase more according to their satisfaction ratings.

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

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CX and Loyalty Connections – Parcel Delivery

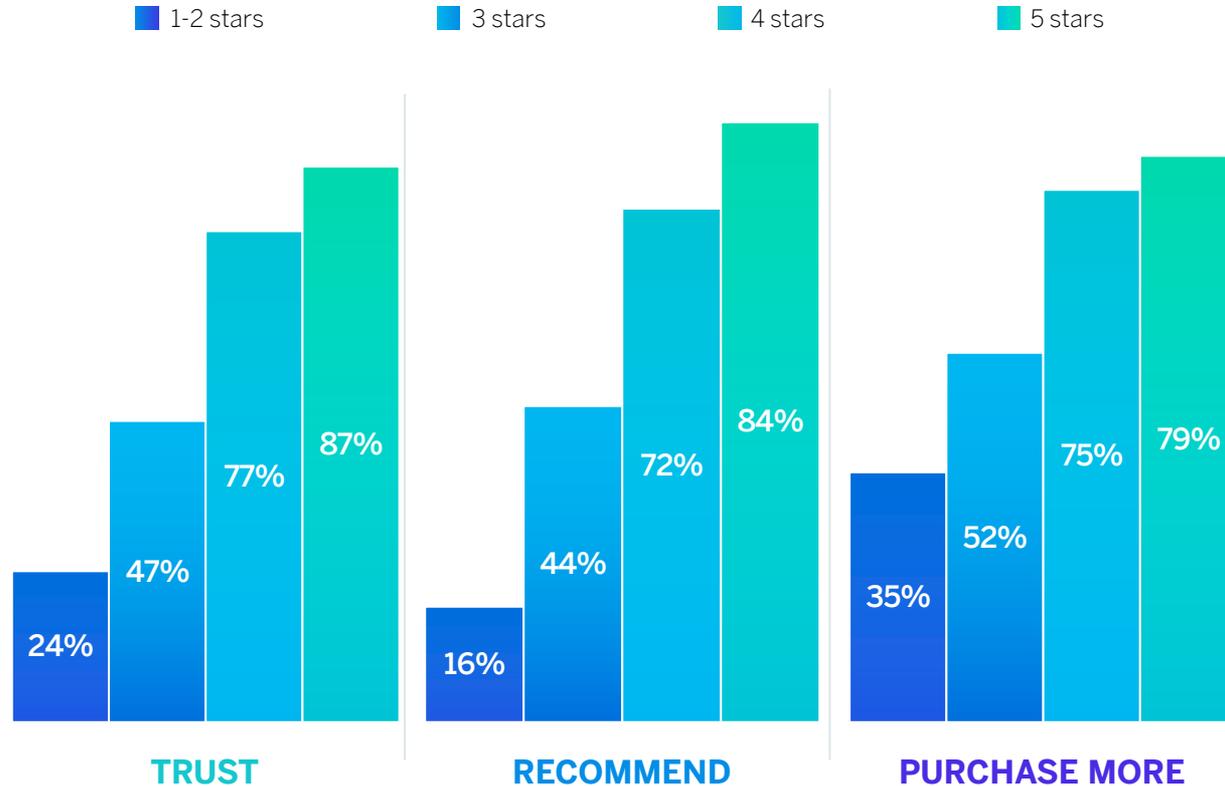
KEY TAKEAWAYS

- + There is a **63**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **68**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

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CX and Loyalty Connections – Property Insurance

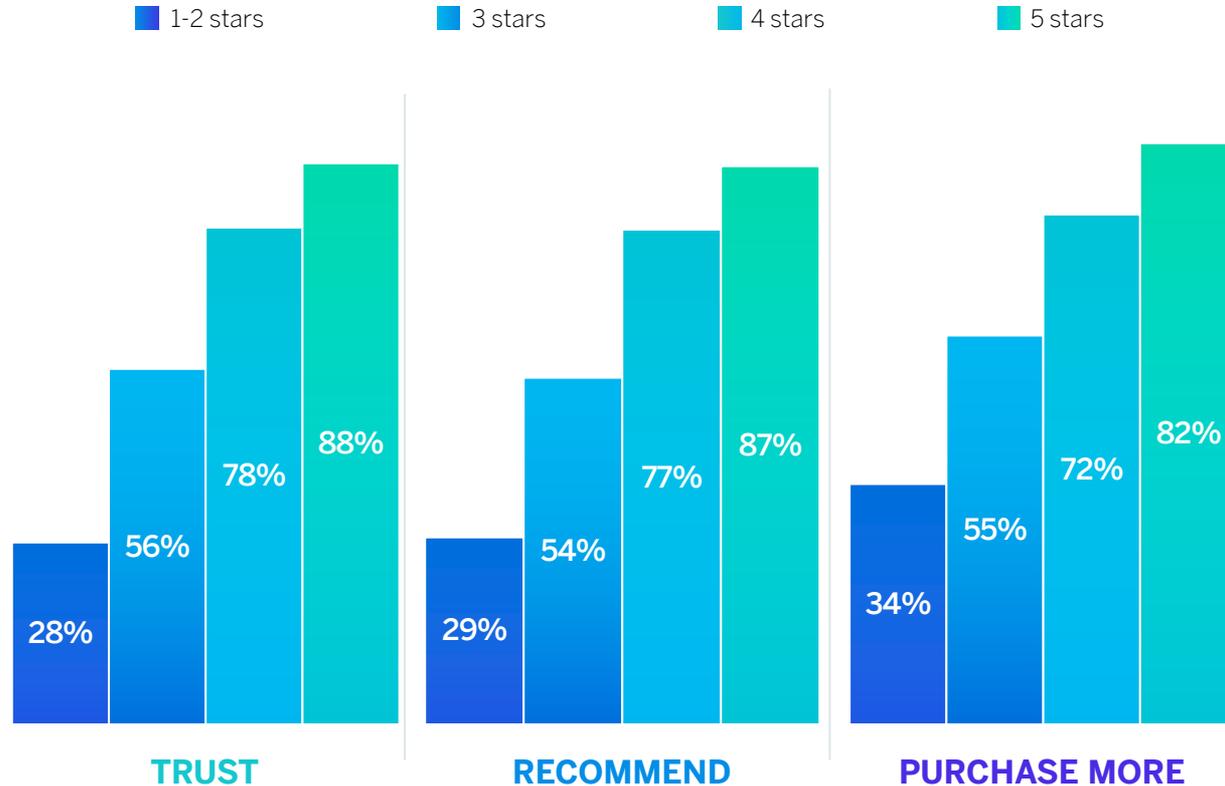
KEY TAKEAWAYS

- + There is a **60**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.4x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

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CX and Loyalty Connections – Public Utilities

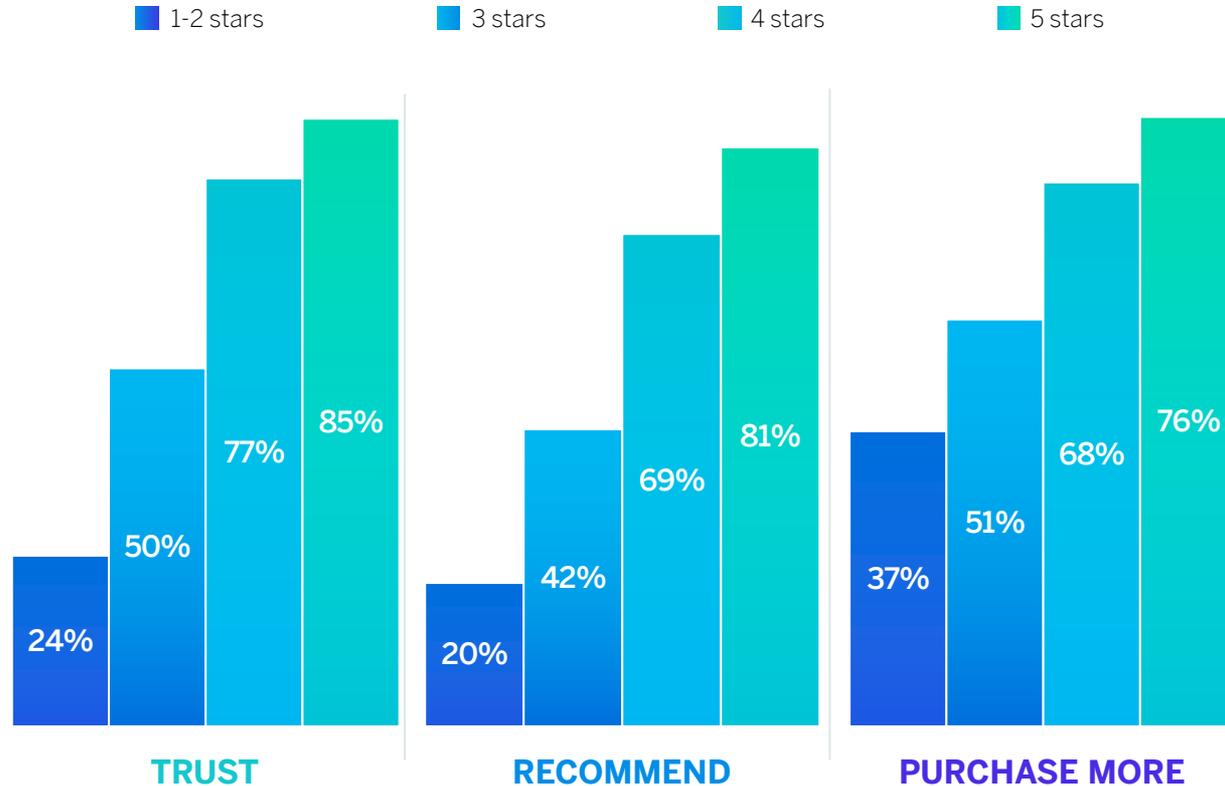
KEY TAKEAWAYS

- + There is a **61**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **61**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.1x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

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CX and Loyalty Connections – Streaming

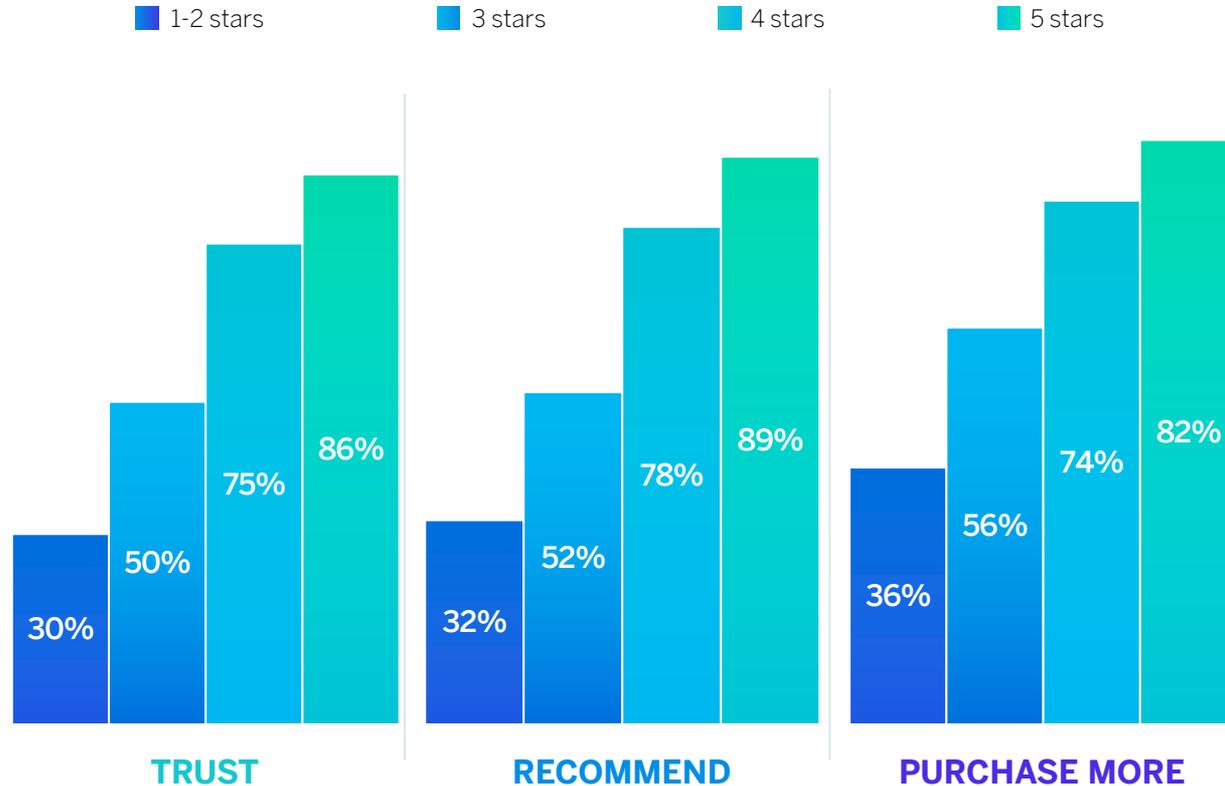
KEY TAKEAWAYS

- + There is a **56**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **57**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



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

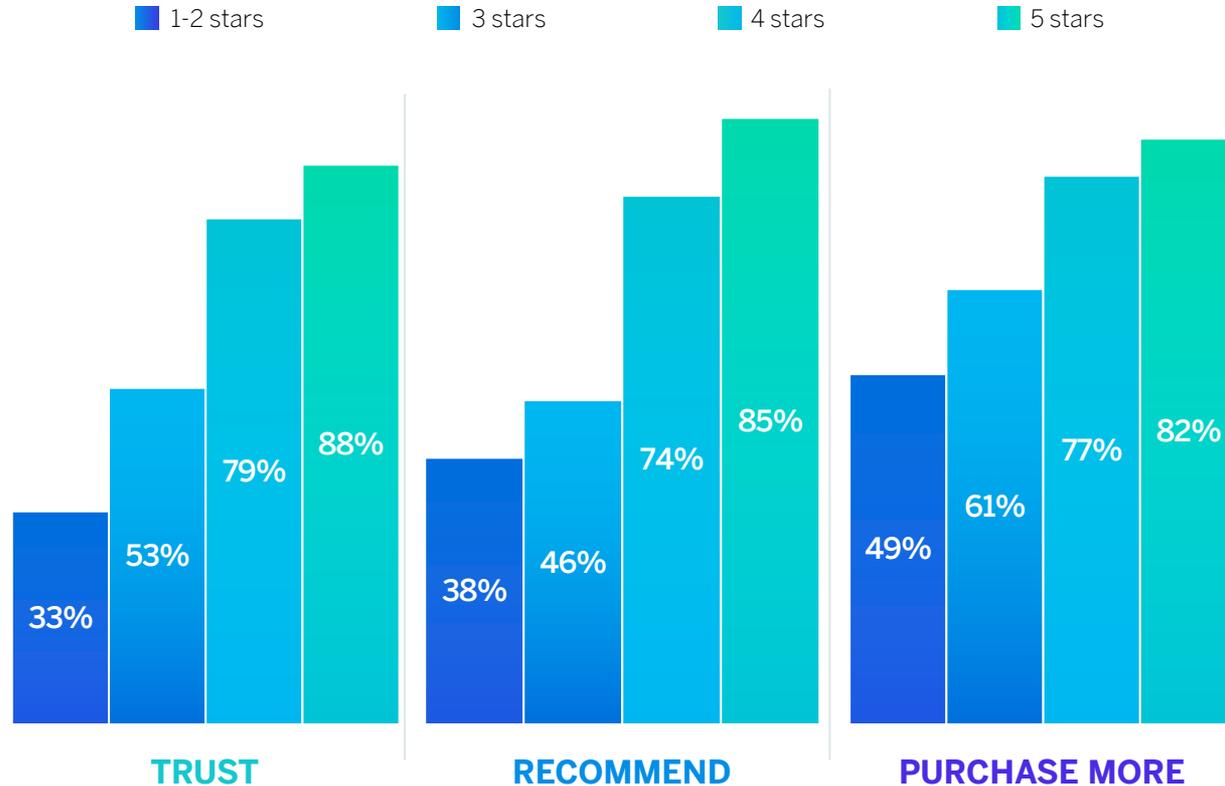
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CX and Loyalty Connections – Supermarkets

KEY TAKEAWAYS

- + There is a **55**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **47**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **1.7x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

Supermarket consumers who say they are “somewhat” or “very” likely to:
(out of 1- to 5-star satisfaction ratings)



ABOUT

The top of this chart shows, across all countries, the correlation between an individual’s likelihood to trust, recommend, or purchase more from supermarkets and their satisfaction levels with a recent supermarket experience. The bottom of this chart shows the percentage of consumers who said they are “somewhat” or “very” likely to trust, recommend, or purchase more according to their satisfaction ratings.

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

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CX and Trust Connections – by Country

KEY TAKEAWAYS

- + Chinese and Indian consumers' trust increases the least after a 5- star experience compared to after a 1-2- star experience; they also are most likely to trust after a 1-2- star experience.
- + Filipino and Vietnamese consumers are most likely to trust after a 5- star experience, while Italian and Japanese consumers are least likely to trust after rating an experience as such.
- + Spanish consumers' trust increases the most after a 5- star experience compared to after a 1-2- star experience, while Chinese consumers' trust increases the least.

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars	5 stars vs 1-2 stars
Australia	19%	46%	75%	89%	4.6x
Belgium	19%	43%	70%	84%	4.5x
Brazil	30%	50%	78%	85%	2.8x
Canada	21%	48%	74%	86%	4.2x
China	51%	65%	85%	89%	1.7x
France	19%	52%	79%	87%	4.6x
Germany	19%	41%	62%	80%	4.2x
Hong Kong	32%	61%	76%	87%	2.8x
India	48%	67%	82%	88%	1.8x
Indonesia	27%	57%	76%	84%	3.1x
Italy	19%	40%	70%	79%	4.2x
Japan	27%	42%	72%	79%	2.9x
Malaysia	32%	55%	81%	89%	2.8x
Mexico	33%	57%	81%	86%	2.6x
Netherlands	24%	47%	72%	82%	3.4x
New Zealand	23%	48%	75%	88%	3.8x
Philippines	31%	61%	85%	90%	2.9x
Singapore	23%	55%	79%	88%	3.8x
South Korea	38%	51%	75%	84%	2.2x
Spain	16%	39%	71%	82%	5.2x
Thailand	32%	51%	80%	89%	2.8x
UK	22%	44%	70%	85%	3.8x
US	19%	44%	76%	86%	4.6x
Vietnam	46%	69%	87%	90%	2.0x

Base: 24,000 consumers across 24 countries

Source: Qualtrics XM Institute Q3 2021 Global Consumer Trends Study

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CX and Recommend Connections – by Country

KEY TAKEAWAYS

- + Chinese and Indian consumers' likelihood to recommend increases the least after a 5-star experience compared to after a 1-2-star experience; along with Vietnamese consumers, they are also most likely to recommend after a 1-2- star experience.
- + Filipino and Thai consumers are most likely to recommend after a 5- star experience, while Japanese and German consumers are least likely to do so after a similarly rated experience.
- + German consumers' propensity to recommend increases the most after a 5- star experience compared to after a 1-2- star experience, while Chinese consumers' increases the least.

ABOUT

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

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

 Two Lowest Trust Gaps  Two Highest Trust Gaps

	1-2 stars	3 stars	4 stars	5 stars	5 stars vs
Australia	16%	41%	71%	86%	5.6x
Belgium	15%	38%	68%	81%	5.5x
Brazil	29%	48%	76%	85%	2.9x
Canada	17%	40%	69%	81%	4.9x
China	52%	63%	83%	87%	1.7x
France	19%	43%	74%	86%	4.5x
Germany	13%	40%	60%	79%	6.3x
Hong Kong	31%	51%	72%	87%	2.8x
India	43%	66%	83%	88%	2.0x
Indonesia	29%	58%	78%	85%	2.9x
Italy	18%	42%	75%	83%	4.7x
Japan	15%	21%	47%	63%	4.1x
Malaysia	28%	52%	77%	88%	3.1x
Mexico	33%	57%	81%	88%	2.7x
Netherlands	22%	41%	66%	81%	3.6x
New Zealand	18%	41%	70%	85%	4.6x
Philippines	30%	61%	85%	91%	3.0x
Singapore	18%	46%	75%	88%	4.8x
South Korea	25%	40%	65%	80%	3.2x
Spain	18%	36%	69%	81%	4.4x
Thailand	28%	48%	79%	90%	3.2x
UK	19%	40%	68%	82%	4.4x
US	20%	38%	73%	85%	4.3x
Vietnam	43%	65%	85%	89%	2.1x

Base: 24,000 consumers across 24 countries

Source: Qualtrics XM Institute Q3 2021 Global Consumer Trends Study

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CX and Repurchase Connections – by Country

KEY TAKEAWAYS

- + German and Japanese consumers are the least likely to purchase more after a 5-star experience.
- + Chinese and Vietnamese consumers have the highest propensity to repurchase after a 5-star experience, while German and Japanese consumers have the least propensity to repurchase after an experience with the same rating.
- + Italian consumers' likelihood to repurchase increases the most after a 5-star experience compared to after a 1-2- star experience, while Chinese and Mexican consumers' likelihood to repurchase increases the least.

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars	5 stars vs 1-2 stars
Australia	29%	50%	68%	77%	2.7x
Belgium	29%	48%	63%	74%	2.6x
Brazil	41%	61%	79%	84%	2.1x
Canada	24%	49%	69%	74%	3.1x
China	53%	70%	86%	88%	1.7x
France	30%	60%	82%	86%	2.9x
Germany	21%	33%	43%	53%	2.5x
Hong Kong	27%	54%	73%	84%	3.1x
India	42%	63%	80%	85%	2.0x
Indonesia	37%	53%	71%	75%	2.0x
Italy	20%	42%	63%	73%	3.6x
Japan	24%	26%	47%	54%	2.2x
Malaysia	28%	53%	74%	82%	2.9x
Mexico	45%	60%	76%	78%	1.7x
Netherlands	23%	38%	51%	61%	2.7x
New Zealand	29%	48%	66%	76%	2.7x
Philippines	30%	55%	80%	86%	2.9x
Singapore	24%	48%	70%	80%	3.3x
South Korea	41%	60%	81%	85%	2.1x
Spain	28%	45%	68%	73%	2.6x
Thailand	29%	49%	76%	84%	2.9x
UK	27%	45%	66%	72%	2.7x
US	35%	48%	70%	78%	2.2x
Vietnam	44%	63%	82%	87%	2.0x

Base: 24,000 consumers across 24 countries

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DATA CALCULATION

Only industries with 100+ respondents who said they had an experience in that industry in the previous 90 days were included in the calculations for this report.

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

In **Figure 4**, we developed the charts for each of the three loyalty behaviors by totaling the number of responses across all industries and countries where consumers said they were either “somewhat” or “very” likely to trust, recommend, or purchase more from an organization. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars.

In **Figures 5-7**, we calculated the percentages for each of the three loyalty behaviors by first totaling the number of global responses where consumers said they were either “somewhat” or “very” likely to trust, recommend, or purchase more from an organization in each industry. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars.

In **Figures 8-24**, the percentages in each chart come from the corresponding tables in Figures 5, 6, and 7. Key Takeaways for purchasing more were calculated by dividing the percentage of consumers who gave a 5-star satisfaction rating by the percentage who gave a 1- or 2-star rating.

In **Figures 25-27**, we calculated the percentages by, for each of the three loyalty behaviors, first totaling the number of responses from each country that indicated consumers were either “somewhat” or “very” likely to trust, recommend, or purchase more from an organization in a given industry. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars.

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