Qualtrics XM institute™

How Success, Effort, and Emotion Affect Loyalty

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May 2022

Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our annual US Consumer Benchmark study, we asked a demographically representative online panel of US consumers that recently interacted with companies across 22 industries to tell us the level of *success, effort,* and *emotion* they felt from that interaction and how likely they are to recommend, forgive, trust, and buy more from that company. From our analysis, we found that:

+ ***Emotion* has the largest impact.** Consumers with a high *emotion* rating are more likely to exhibit the four loyalty behaviors (likelihood to recommend, forgive, trust, and buy more) than consumers with high *success* or *effort* ratings. Across all industries, *emotion* most highly correlates with likelihood to purchase more, with 86% that had a high *emotion* rating likely to do so.

+ ***Effort* and *Success* also have positive effects.** On average across all industries, *effort* and *success* have a strong positive impact on all loyalty behaviors. These customer experience components have the highest correlation with a consumer's likelihood to purchase more; 80% of consumers with a high *success* rating are likely to purchase more while only 20% with a low *success* rating are likely to do so. These numbers are 81% and 19% respectively for *effort*.

+ **Airline loyalty is most affected by consumer experience.** Across the four loyalty metrics, the largest average gaps between high and low *success, effort*, and *emotion* ratings are in the airline industry. Consumers with high *success* ratings are 59 percentage-points more likely to exhibit loyalty behaviors. This gap stands at 62 points and 68 points for *emotion* and *effort* ratings, respectively.

+ **Consumer payment loyalty is least affected by consumer experience.** Consumers with high *effort* ratings are on average 42 points more likely than those with low effort ratings to recommend, forgive, trust, and buy more – the smallest gap across all 22 industries. Consumers with high *success* ratings are 39 points more likely to exhibit these behaviors, and high *emotion* rates garner a 53 point gap, which are each the smallest gaps present for the component.

STUDY KEY FACTS

- 9,055 US Consumers
- Online Study
- 22 industries
- Conducted in Q3 of 2021

Loyalty According to Customer Experience

STUDY OVERVIEW

The data for this report comes from a US consumer study that Qualtrics XM Institute conducted in the third quarter of 2021. Using an online survey, XM Institute collected data from 9,055 consumers within the United States of America. To ensure that the data was reflective of the population within those countries, we set quotas for responses to match the gender, age, ethnicity, geographical region, and income according to the latest available U.S. Census.

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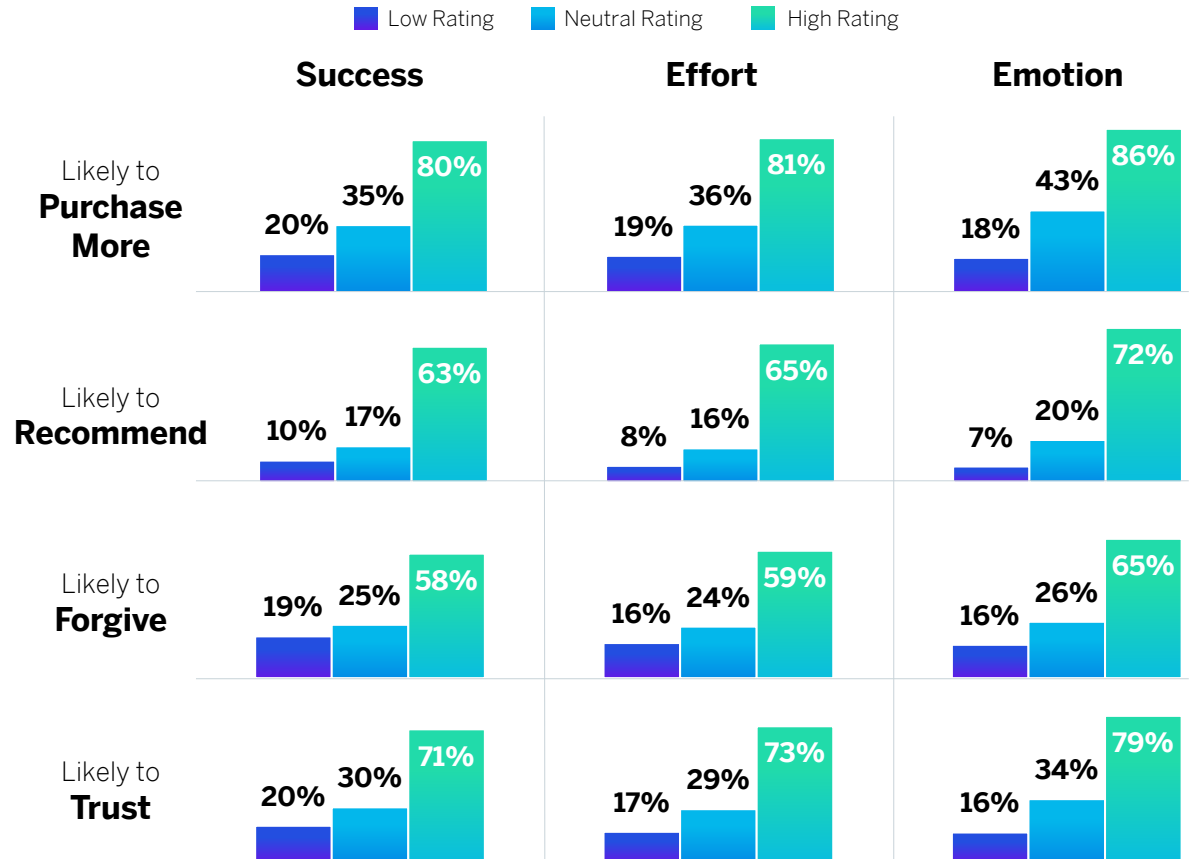23. Loyalty Metrics by CX Ratings: Wireless

Methodology

Loyalty Metrics by CX Ratings: Overall

KEY TAKEAWAYS

+ Consumers' likelihood to purchase more is 4.3x higher on average after rating their experience highly versus rating it poorly for success, effort, or emotion. Their likelihood to forgive is 3.6x higher, and their likelihood to trust is 4.3x higher.

+ High versus low emotion customer experience ratings create the largest difference in the likelihood to perform each loyalty metric.

ABOUT

These charts show the likelihood for a consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings as an average across all 22 industries.

Consumer Loyalty Based On Customer Experience Ratings
Average across all industries

■ Low Rating   ■ Neutral Rating   ■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	20% / 35% / 80%	19% / 36% / 81%	18% / 43% / 86%
Likely to Recommend	10% / 17% / 63%	8% / 16% / 65%	7% / 20% / 72%
Likely to Forgive	19% / 25% / 58%	16% / 24% / 59%	16% / 26% / 65%
Likely to Trust	20% / 30% / 71%	17% / 29% / 73%	16% / 34% / 79%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

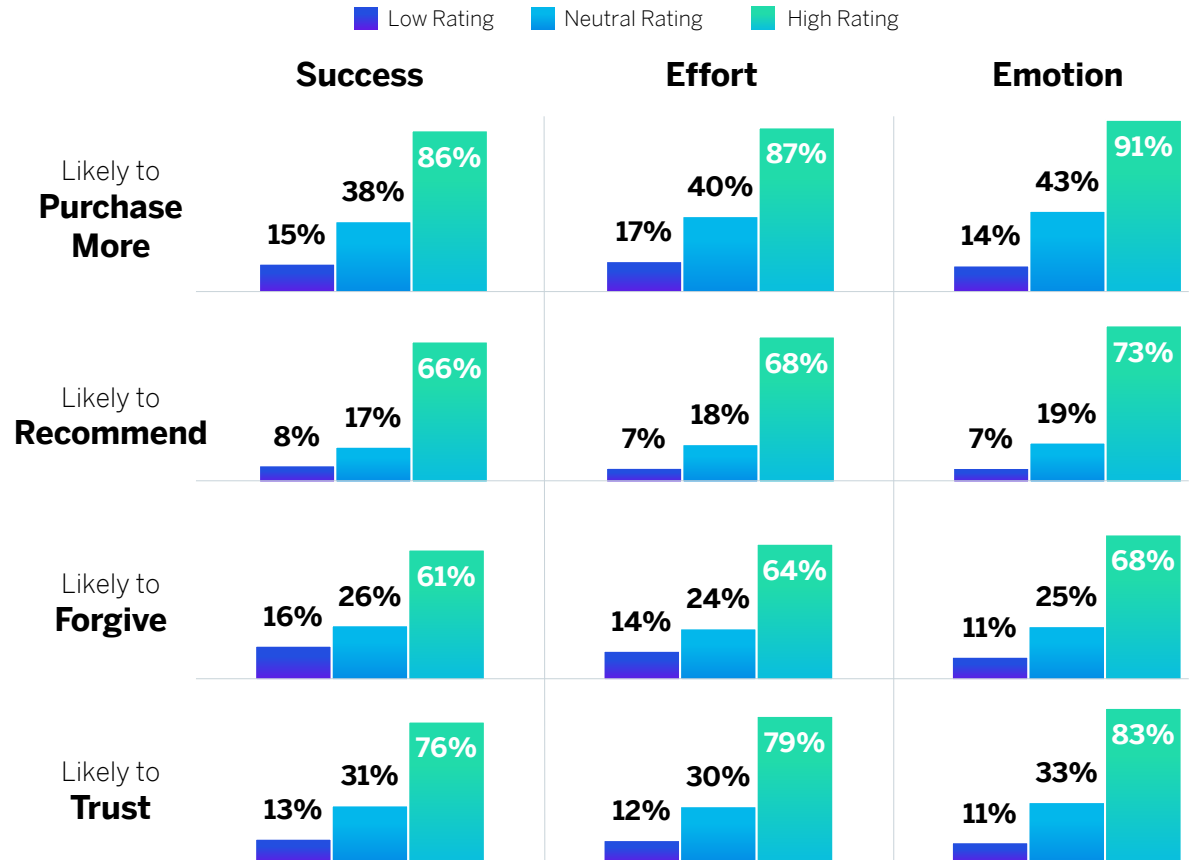# Loyalty Metrics by CX Ratings: Airlines

KEY TAKEAWAYS

+ Airline consumers who were delighted by their most recent experience are 6.5x more likely to purchase more and 10.4x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 5.7x more likely to purchase more and 5.8x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 9.7x less likely to recommend and 4.6x less likely to forgive than those that had an easy experience.

ABOUT

These charts show the likelihood for an airline consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 9 airlines

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

Success / Effort / Emotion

Likely to **Purchase More**
- Success: 15%, 38%, 86%
- Effort: 17%, 40%, 87%
- Emotion: 14%, 43%, 91%

Likely to **Recommend**
- Success: 8%, 17%, 66%
- Effort: 7%, 18%, 68%
- Emotion: 7%, 19%, 73%

Likely to **Forgive**
- Success: 16%, 26%, 61%
- Effort: 14%, 24%, 64%
- Emotion: 11%, 25%, 68%

Likely to **Trust**
- Success: 13%, 31%, 76%
- Effort: 12%, 30%, 79%
- Emotion: 11%, 33%, 83%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Auto

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.4x more likely to purchase more and 9.4x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.7x more likely to purchase more and 3.2x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 10.1x less likely to recommend and 3.6x less likely to forgive than those that had an easy experience.
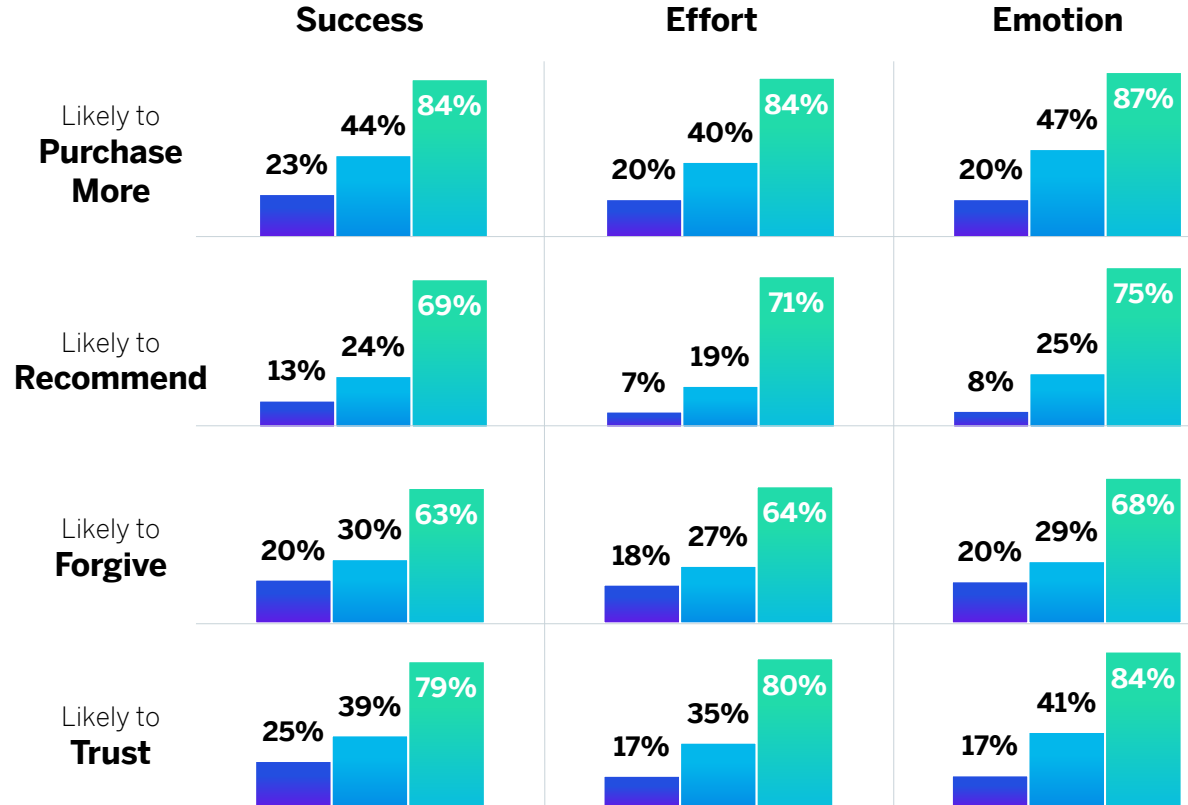
ABOUT

These charts show the likelihood for an auto consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 17 auto companies

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success	Effort	Emotion
Likely to **Purchase More**	23% / 44% / 84%	20% / 40% / 84%	20% / 47% / 87%
Likely to **Recommend**	13% / 24% / 69%	7% / 19% / 71%	8% / 25% / 75%
Likely to **Forgive**	20% / 30% / 63%	18% / 27% / 64%	20% / 29% / 68%
Likely to **Trust**	25% / 39% / 79%	17% / 35% / 80%	17% / 41% / 84%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

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Loyalty Metrics by CX Ratings: Bank

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 5.4x more likely to purchase more and 10.6x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.5x more likely to purchase more and 3.6x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 8.1x less likely to recommend and 4.8x less likely to forgive than those that had an easy experience.
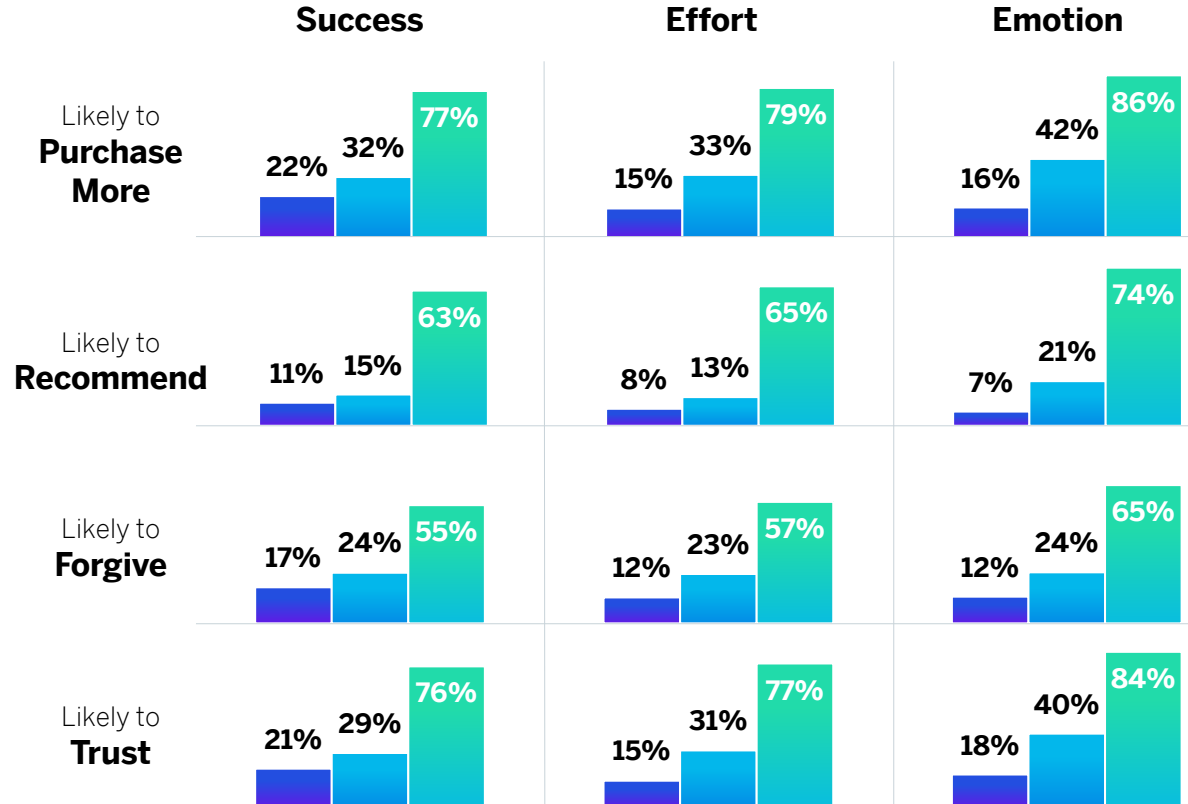
ABOUT

These charts show the likelihood for a bank consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 15 banks

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Likely to **Purchase More**	22%	32%	77%	15%	33%	79%	16%	42%	86%
Likely to **Recommend**	11%	15%	63%	8%	13%	65%	7%	21%	74%
Likely to **Forgive**	17%	24%	55%	12%	23%	57%	12%	24%	65%
Likely to **Trust**	21%	29%	76%	15%	31%	77%	18%	40%	84%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Car Rental

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 5.9x more likely to purchase more and 13.4x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4.1x more likely to purchase more and 3.5x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 15.4x less likely to recommend and 5.8x less likely to forgive than those that had an easy experience.
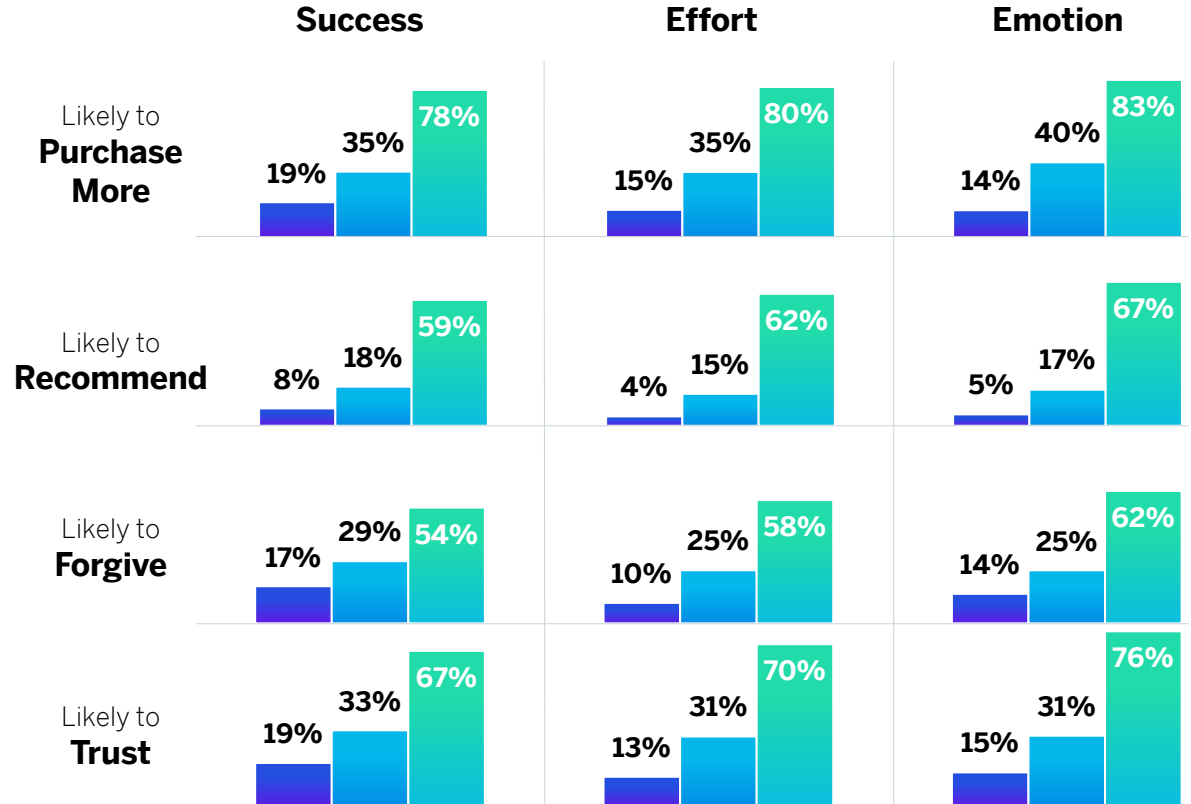
ABOUT

These charts show the likelihood for a car rental consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 13 car rental companies

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

Success | **Effort** | **Emotion**

Likely to **Purchase More**
- Success: 19%, 35%, 78%
- Effort: 15%, 35%, 80%
- Emotion: 14%, 40%, 83%

Likely to **Recommend**
- Success: 8%, 18%, 59%
- Effort: 4%, 15%, 62%
- Emotion: 5%, 17%, 67%

Likely to **Forgive**
- Success: 17%, 29%, 54%
- Effort: 10%, 25%, 58%
- Emotion: 14%, 25%, 62%

Likely to **Trust**
- Success: 19%, 33%, 67%
- Effort: 13%, 31%, 70%
- Emotion: 15%, 31%, 76%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Computer and Tablet Makers

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.8x more likely to purchase more and 10.4x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.4x more likely to purchase more and 3.2x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 15.4x less likely to recommend and 5.8x less likely to forgive than those that had an easy experience.
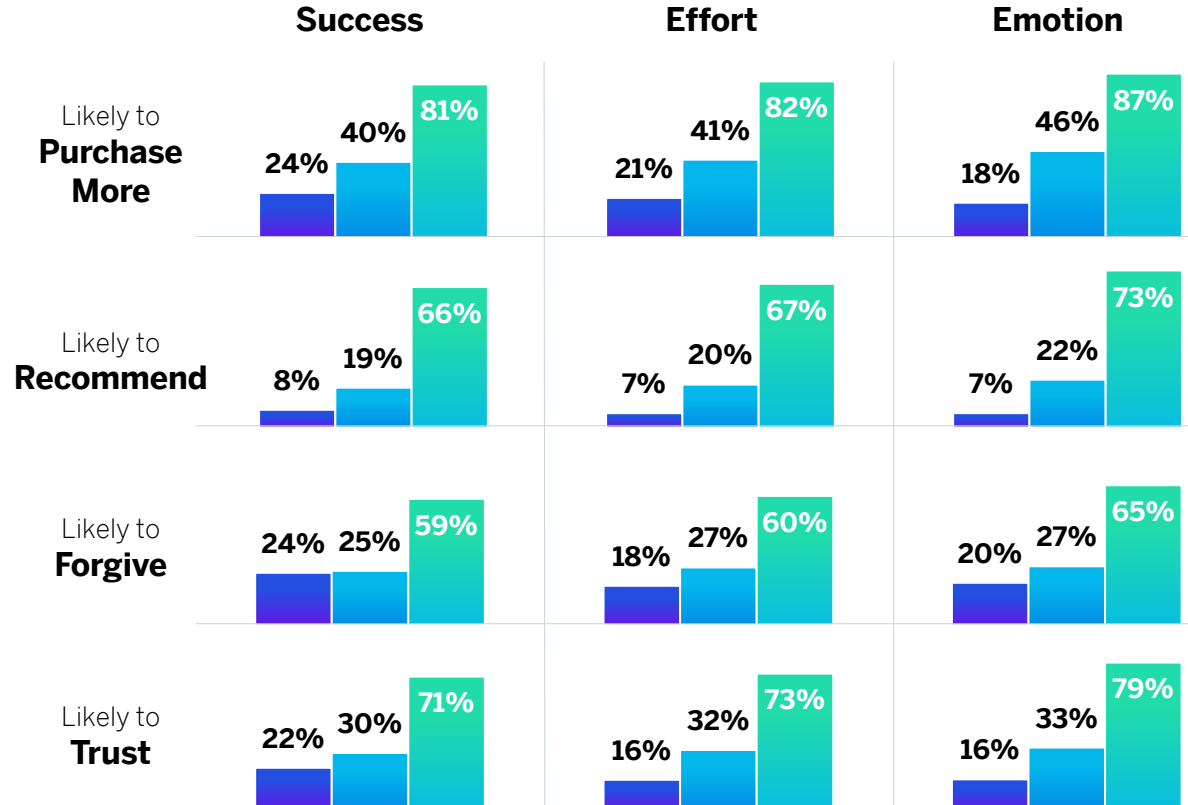
ABOUT

These charts show the likelihood for a computer/tablet consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 13 computer/tablet companies

Legend: Low Rating, Neutral Rating, High Rating

Success

Likely to Purchase More: 24%, 40%, 81%
Likely to Recommend: 8%, 19%, 66%
Likely to Forgive: 24%, 25%, 59%
Likely to Trust: 22%, 30%, 71%

Effort

Likely to Purchase More: 21%, 41%, 82%
Likely to Recommend: 7%, 20%, 67%
Likely to Forgive: 18%, 27%, 60%
Likely to Trust: 16%, 32%, 73%

Emotion

Likely to Purchase More: 18%, 46%, 87%
Likely to Recommend: 7%, 22%, 73%
Likely to Forgive: 20%, 27%, 65%
Likely to Trust: 16%, 33%, 79%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Consumer Payment

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 5.2x more likely to purchase more and 8.4x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 2.5x more likely to purchase more and 3.2x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 4.4x less likely to recommend and 3.2x less likely to forgive than those that had an easy experience.
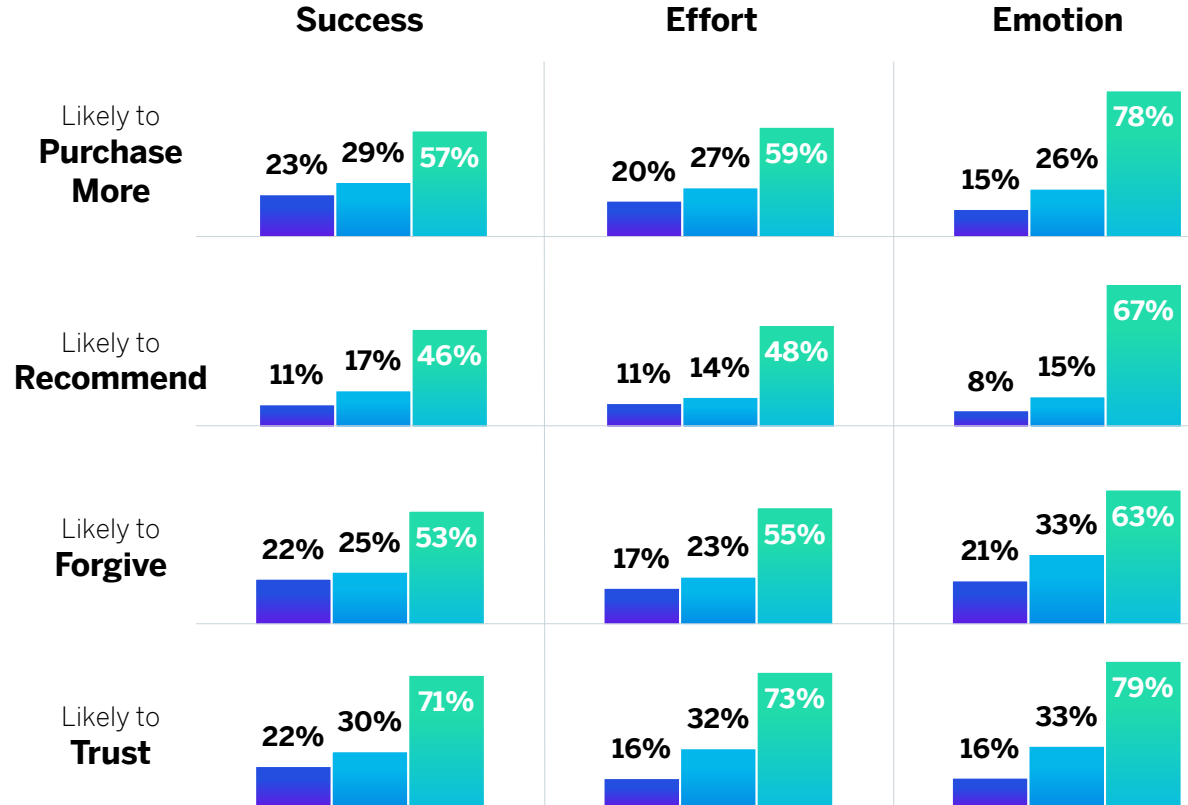
ABOUT

These charts show the likelihood for a consumer payments user to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings

Average across 17 consumer payment companies

■ Low Rating　■ Neutral Rating　■ High Rating

	Success	Effort	Emotion
Likely to **Purchase More**	23% 29% 57%	20% 27% 59%	15% 26% 78%
Likely to **Recommend**	11% 17% 46%	11% 14% 48%	8% 15% 67%
Likely to **Forgive**	22% 25% 53%	17% 23% 55%	21% 33% 63%
Likely to **Trust**	22% 30% 71%	16% 32% 73%	16% 33% 79%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

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Loyalty Metrics by CX Ratings: Electronics

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 3.5x more likely to purchase more and 7.8x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.2x more likely to purchase more and 3.6x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 11x less likely to recommend and 2.9x less likely to forgive than those that had an easy experience.
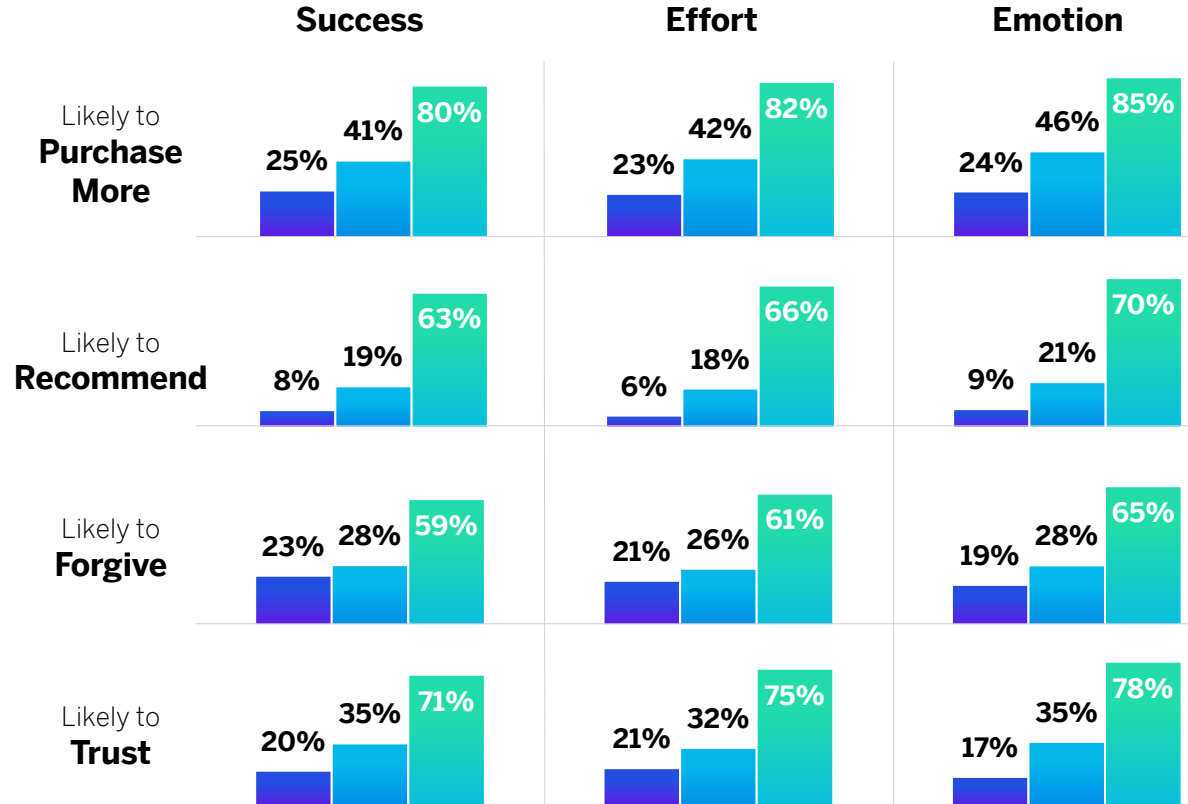
ABOUT

These charts show the likelihood for an electronics consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 13 electronics companies

■ Low Rating   ■ Neutral Rating   ■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	25% / 41% / 80%	23% / 42% / 82%	24% / 46% / 85%
Likely to Recommend	8% / 19% / 63%	6% / 18% / 66%	9% / 21% / 70%
Likely to Forgive	23% / 28% / 59%	21% / 26% / 61%	19% / 28% / 65%
Likely to Trust	20% / 35% / 71%	21% / 32% / 75%	17% / 35% / 78%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Fast Food

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.7x more likely to purchase more and 17.8x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 5.7x more likely to purchase more and 5.2x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 15.5x less likely to recommend and 3.7x less likely to forgive than those that had an easy experience.
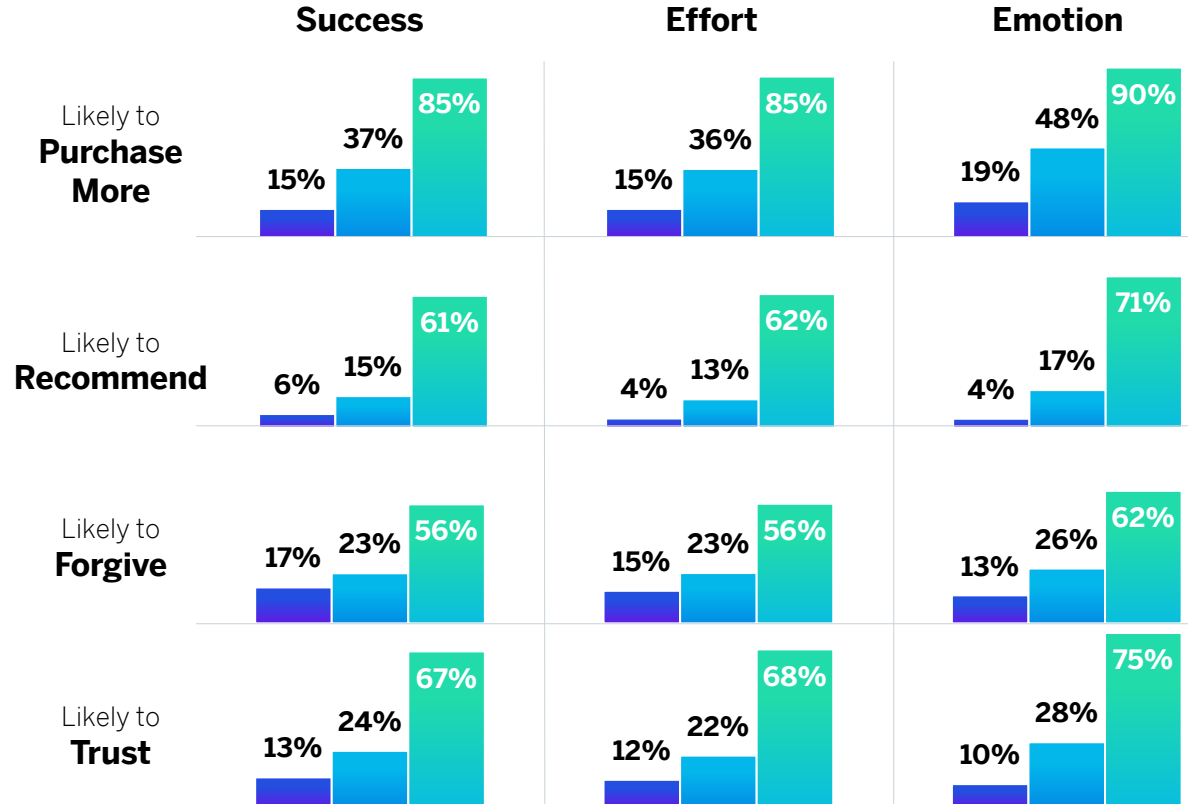
ABOUT

These charts show the likelihood for a fast food consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 24 fast food companies

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	15% / 37% / 85%	15% / 36% / 85%	19% / 48% / 90%
Likely to Recommend	6% / 15% / 61%	4% / 13% / 62%	4% / 17% / 71%
Likely to Forgive	17% / 23% / 56%	15% / 23% / 56%	13% / 26% / 62%
Likely to Trust	13% / 24% / 67%	12% / 22% / 68%	10% / 28% / 75%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Food Takeout & Delivery

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.5x more likely to purchase more and 7.9x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.7x more likely to purchase more and 5x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 5.6x less likely to recommend and 3.4x less likely to forgive than those that had an easy experience.
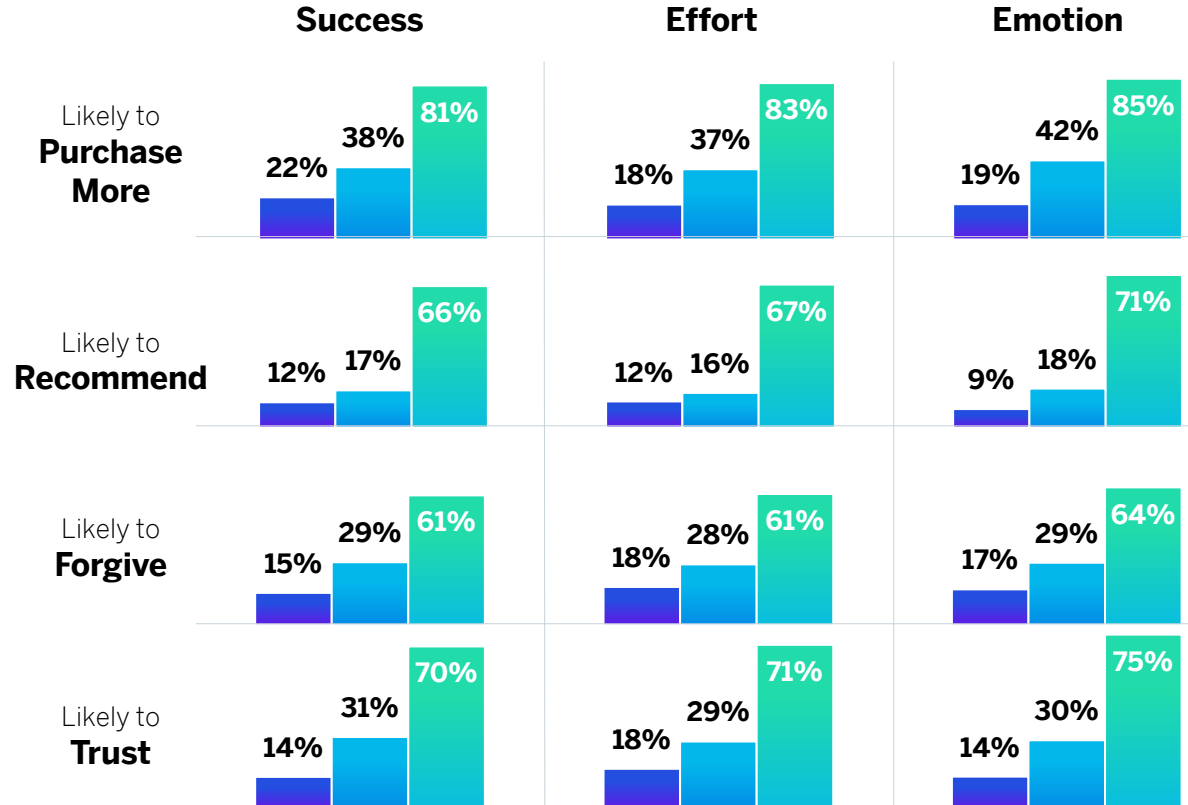
ABOUT

These charts show the likelihood for a food takeout and delivery consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings

Average across 12 Food Takeout & Delivery Platforms

■ Low Rating ■ Neutral Rating ■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	22% / 38% / 81%	18% / 37% / 83%	19% / 42% / 85%
Likely to Recommend	12% / 17% / 66%	12% / 16% / 67%	9% / 18% / 71%
Likely to Forgive	15% / 29% / 61%	18% / 28% / 61%	17% / 29% / 64%
Likely to Trust	14% / 31% / 70%	18% / 29% / 71%	14% / 30% / 75%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Grocery

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 5.3x more likely to purchase more and 8.1x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.8x more likely to purchase more and 2.8x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 13x less likely to recommend and 3.4x less likely to forgive than those that had an easy experience.
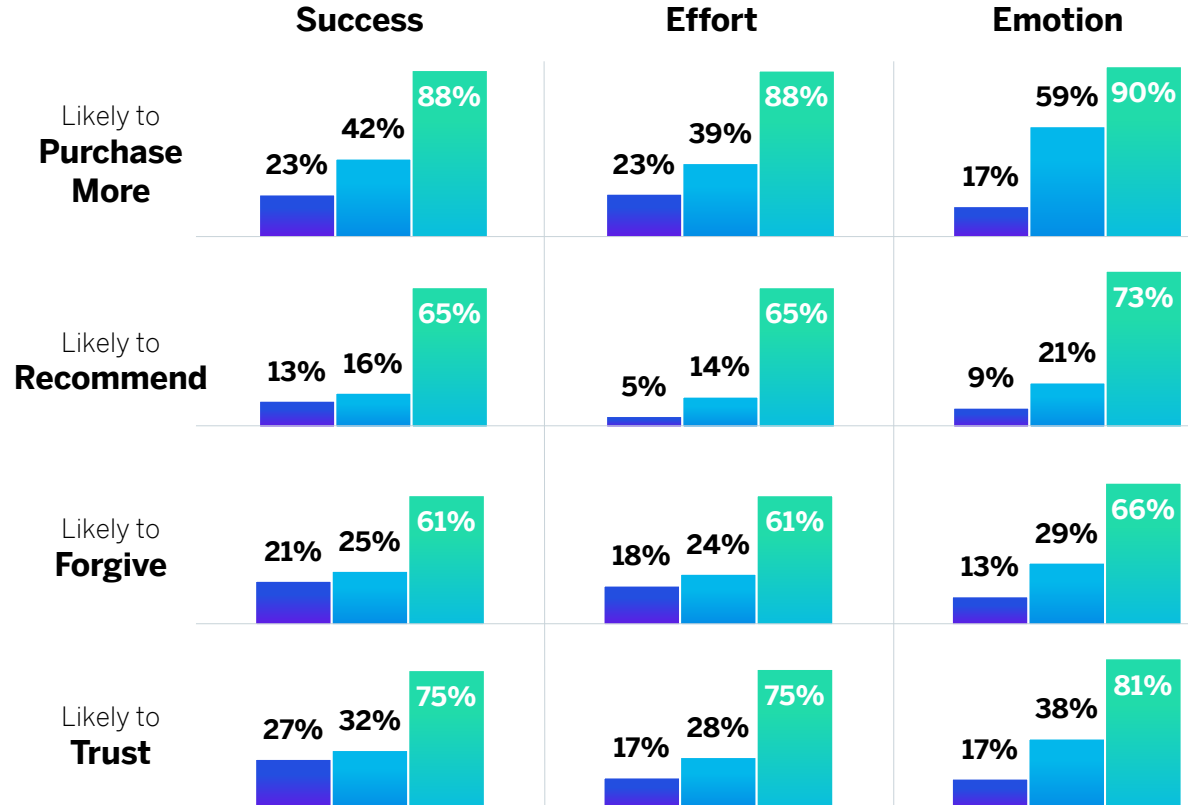
ABOUT

These charts show the likelihood for a grocery consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 21 grocery companies

■ Low Rating   ■ Neutral Rating   ■ High Rating

	Success	**Effort**	**Emotion**
Likely to Purchase More	23% / 42% / 88%	23% / 39% / 88%	17% / 59% / 90%
Likely to Recommend	13% / 16% / 65%	5% / 14% / 65%	9% / 21% / 73%
Likely to Forgive	21% / 25% / 61%	18% / 24% / 61%	13% / 29% / 66%
Likely to Trust	27% / 32% / 75%	17% / 28% / 75%	17% / 38% / 81%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Health Insurance

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4x more likely to purchase more and 14.4x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4.3x more likely to purchase more and 3.4x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 9.4x less likely to recommend and 3.4x less likely to forgive than those that had an easy experience.
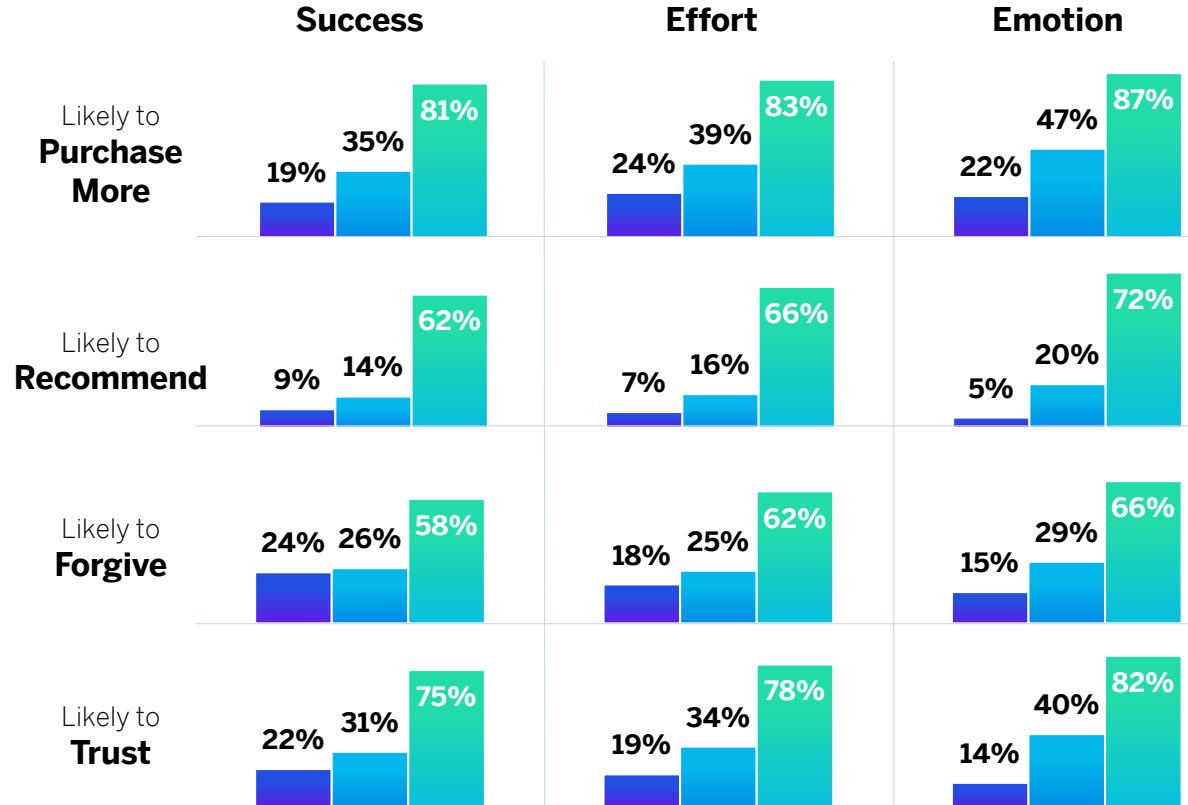
ABOUT

These charts show the likelihood for a health insurance consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 15 health insurers

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success			Effort			Emotion		
Likely to **Purchase More**	19%	35%	81%	24%	39%	83%	22%	47%	87%
Likely to **Recommend**	9%	14%	62%	7%	16%	66%	5%	20%	72%
Likely to **Forgive**	24%	26%	58%	18%	25%	62%	15%	29%	66%
Likely to **Trust**	22%	31%	75%	19%	34%	78%	14%	40%	82%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

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Loyalty Metrics by CX Ratings: Hotel

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.9x more likely to purchase more and 9.7x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4x more likely to purchase more and 3.6x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 7.9x less likely to recommend and 3.8x less likely to forgive than those that had an easy experience.
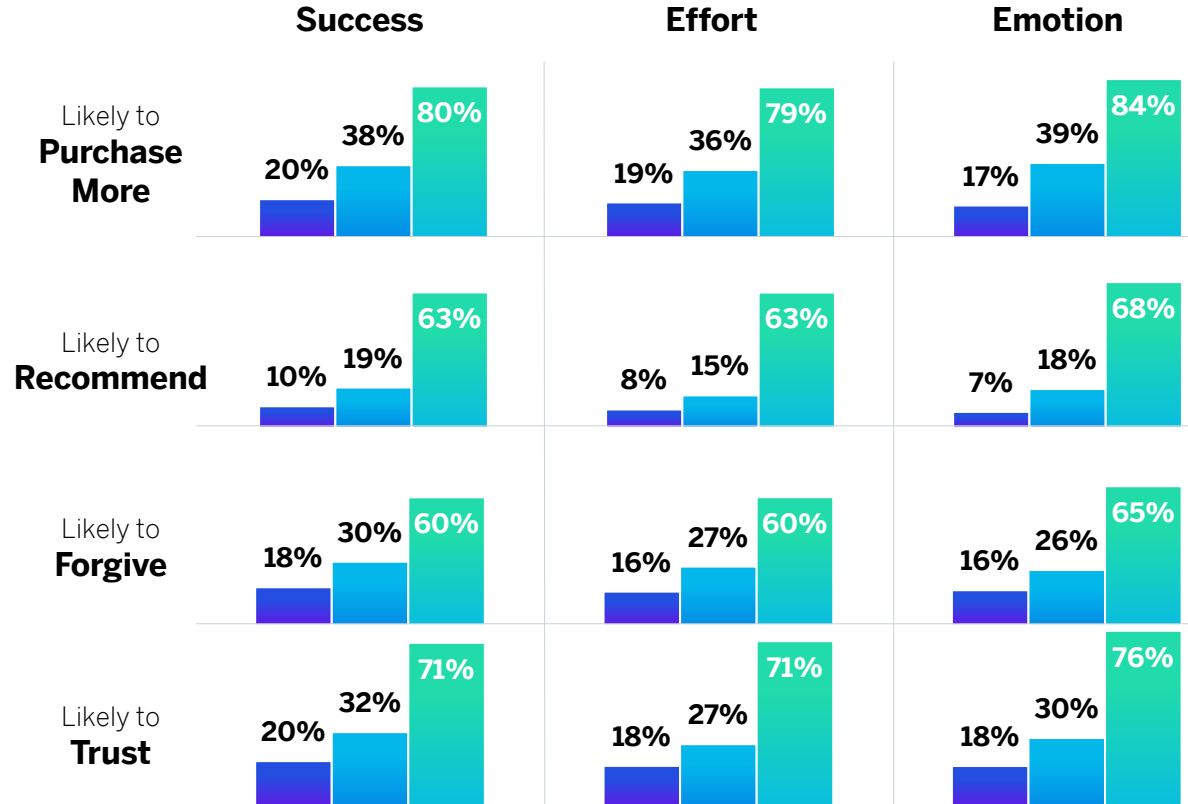
ABOUT

These charts show the likelihood for a hotel consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 22 hotels

■ Low Rating　■ Neutral Rating　■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	20% / 38% / 80%	19% / 36% / 79%	17% / 39% / 84%
Likely to Recommend	10% / 19% / 63%	8% / 15% / 63%	7% / 18% / 68%
Likely to Forgive	18% / 30% / 60%	16% / 27% / 60%	16% / 26% / 65%
Likely to Trust	20% / 32% / 71%	18% / 27% / 71%	18% / 30% / 76%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

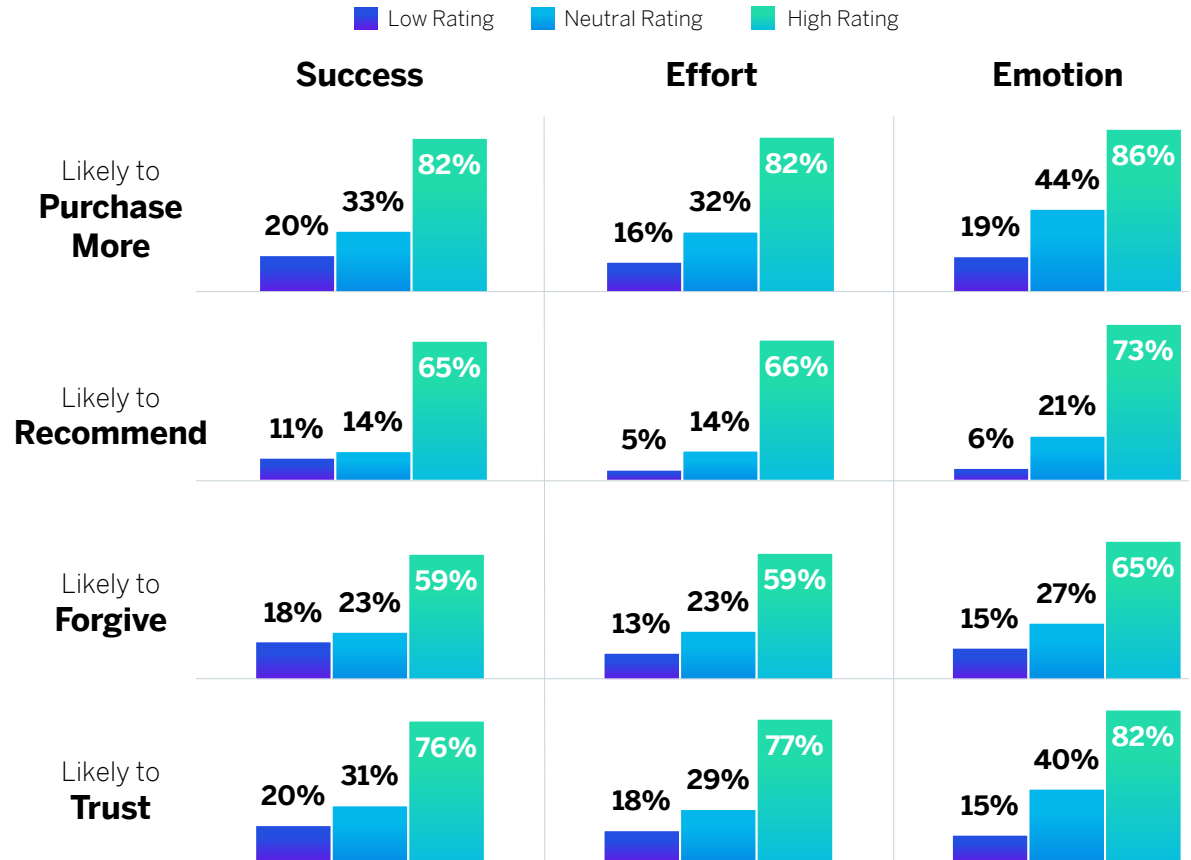# Loyalty Metrics by CX Ratings: Insurance

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.5x more likely to purchase more and 12.1x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4.1x more likely to purchase more and 3.8x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 13.2x less likely to recommend and 4.5x less likely to forgive than those that had an easy experience.

ABOUT

These charts show the likelihood for an insurance consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 15 insurers

■ Low Rating   ■ Neutral Rating   ■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	20% / 33% / 82%	16% / 32% / 82%	19% / 44% / 86%
Likely to Recommend	11% / 14% / 65%	5% / 14% / 66%	6% / 21% / 73%
Likely to Forgive	18% / 23% / 59%	13% / 23% / 59%	15% / 27% / 65%
Likely to Trust	20% / 31% / 76%	18% / 29% / 77%	15% / 40% / 82%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Investment Firms

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.8x more likely to purchase more and 10.6x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.4x more likely to purchase more and 3.4x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 9.9x less likely to recommend and 3.1x less likely to forgive than those that had an easy experience.
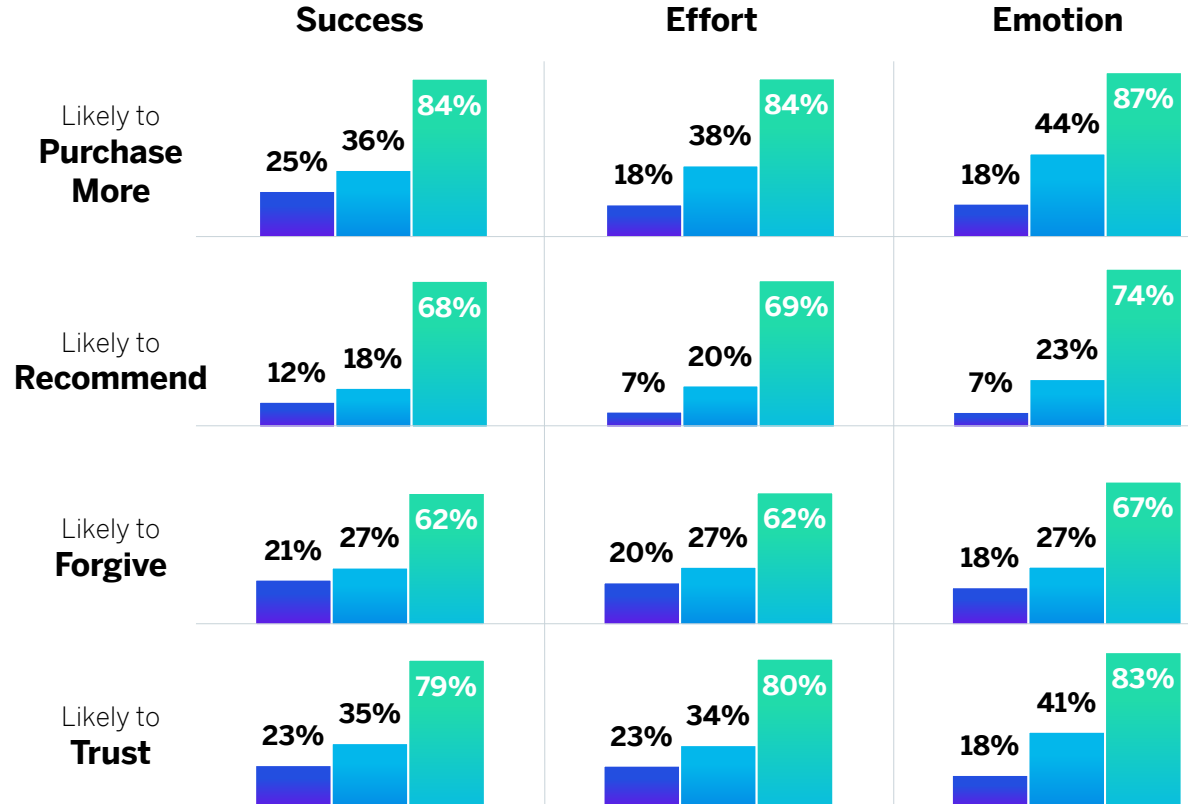
ABOUT

These charts show the likelihood for an investments consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 13 investment firms

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

Success | Effort | Emotion

Likely to **Purchase More**
- Success: 25% / 36% / 84%
- Effort: 18% / 38% / 84%
- Emotion: 18% / 44% / 87%

Likely to **Recommend**
- Success: 12% / 18% / 68%
- Effort: 7% / 20% / 69%
- Emotion: 7% / 23% / 74%

Likely to **Forgive**
- Success: 21% / 27% / 62%
- Effort: 20% / 27% / 62%
- Emotion: 18% / 27% / 67%

Likely to **Trust**
- Success: 23% / 35% / 79%
- Effort: 23% / 34% / 80%
- Emotion: 18% / 41% / 83%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Parcel Delivery

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 3.8x more likely to purchase more and 7.5x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.4x more likely to purchase more and 2.9x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 5.6x less likely to recommend and 3.3x less likely to forgive than those that had an easy experience.
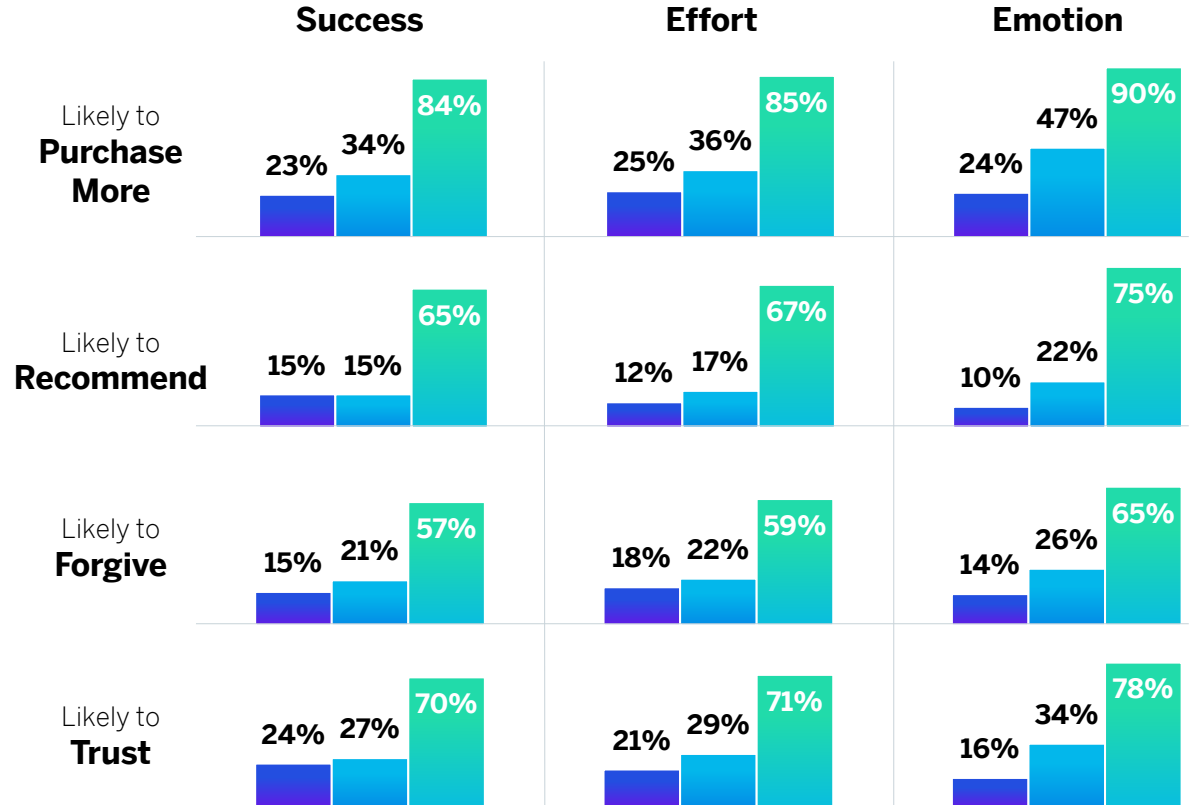
ABOUT

These charts show the likelihood for a parcel delivery consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 5 parcel delivery services

Legend: Low Rating | Neutral Rating | High Rating

	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Likely to **Purchase More**	23%	34%	84%	25%	36%	85%	24%	47%	90%
Likely to **Recommend**	15%	15%	65%	12%	17%	67%	10%	22%	75%
Likely to **Forgive**	15%	21%	57%	18%	22%	59%	14%	26%	65%
Likely to **Trust**	24%	27%	70%	21%	29%	71%	16%	34%	78%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Retail

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.3x more likely to purchase more and 9.3x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.7x more likely to purchase more and 3.6x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 11x less likely to recommend and 3.6x less likely to forgive than those that had an easy experience.
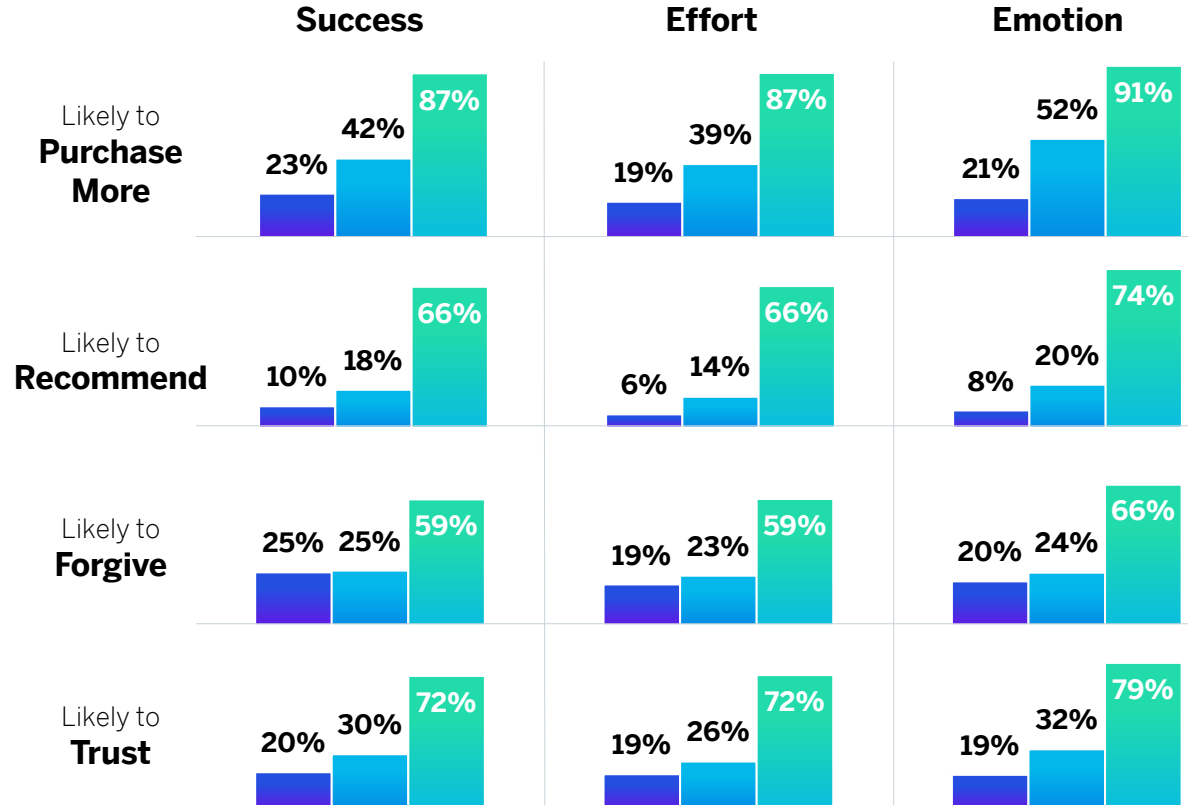
ABOUT

These charts show the likelihood for a retail consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 42 retailers

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

Success

	Low	Neutral	High
Likely to **Purchase More**	23%	42%	87%
Likely to **Recommend**	10%	18%	66%
Likely to **Forgive**	25%	25%	59%
Likely to **Trust**	20%	30%	72%

Effort

	Low	Neutral	High
Likely to **Purchase More**	19%	39%	87%
Likely to **Recommend**	6%	14%	66%
Likely to **Forgive**	19%	23%	59%
Likely to **Trust**	19%	26%	72%

Emotion

	Low	Neutral	High
Likely to **Purchase More**	21%	52%	91%
Likely to **Recommend**	8%	20%	74%
Likely to **Forgive**	20%	24%	66%
Likely to **Trust**	19%	32%	79%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Software

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4x more likely to purchase more and 8x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 3.8x more likely to purchase more and 2.6x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 8.4x less likely to recommend and 3.4x less likely to forgive than those that had an easy experience.
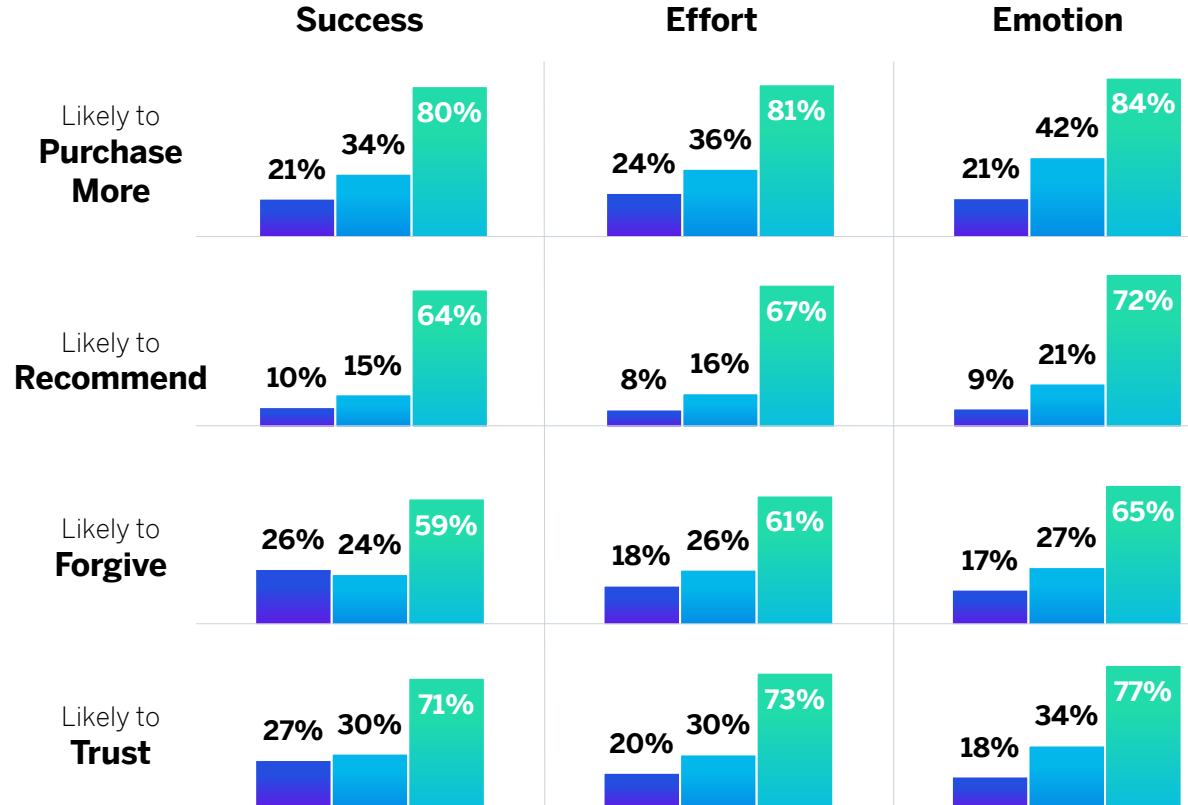
ABOUT

These charts show the likelihood for a software consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 10 software companies

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success			Effort			Emotion		
Likely to **Purchase More**	21%	34%	80%	24%	36%	81%	21%	42%	84%
Likely to **Recommend**	10%	15%	64%	8%	16%	67%	9%	21%	72%
Likely to **Forgive**	26%	24%	59%	18%	26%	61%	17%	27%	65%
Likely to **Trust**	27%	30%	71%	20%	30%	73%	18%	34%	77%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

www.**xminstitute**.com

Loyalty Metrics by CX Ratings: Social Media

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 6x more likely to purchase more and 10.7x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4.8x more likely to purchase more and 4.4x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 9.1x less likely to recommend and 3.7x less likely to forgive than those that had an easy experience.
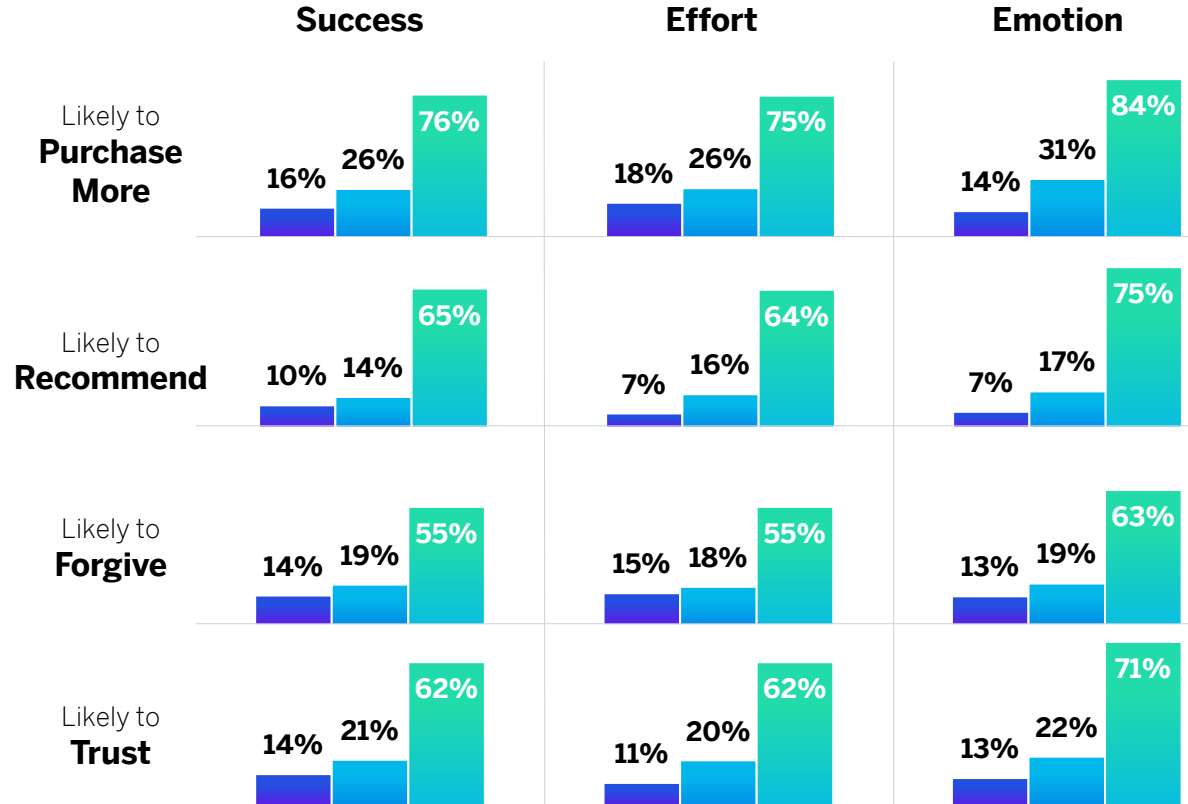
ABOUT

These charts show the likelihood for a social media consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 10 social media platforms

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

Success / Effort / Emotion

	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Likely to Purchase More	16%	26%	76%	18%	26%	75%	14%	31%	84%
Likely to Recommend	10%	14%	65%	7%	16%	64%	7%	17%	75%
Likely to Forgive	14%	19%	55%	15%	18%	55%	13%	19%	63%
Likely to Trust	14%	21%	62%	11%	20%	62%	13%	22%	71%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Streaming Media

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.5x more likely to purchase more and 6.7x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4.1x more likely to purchase more and 3.1x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 7.6x less likely to recommend and 3.5x less likely to forgive than those that had an easy experience.
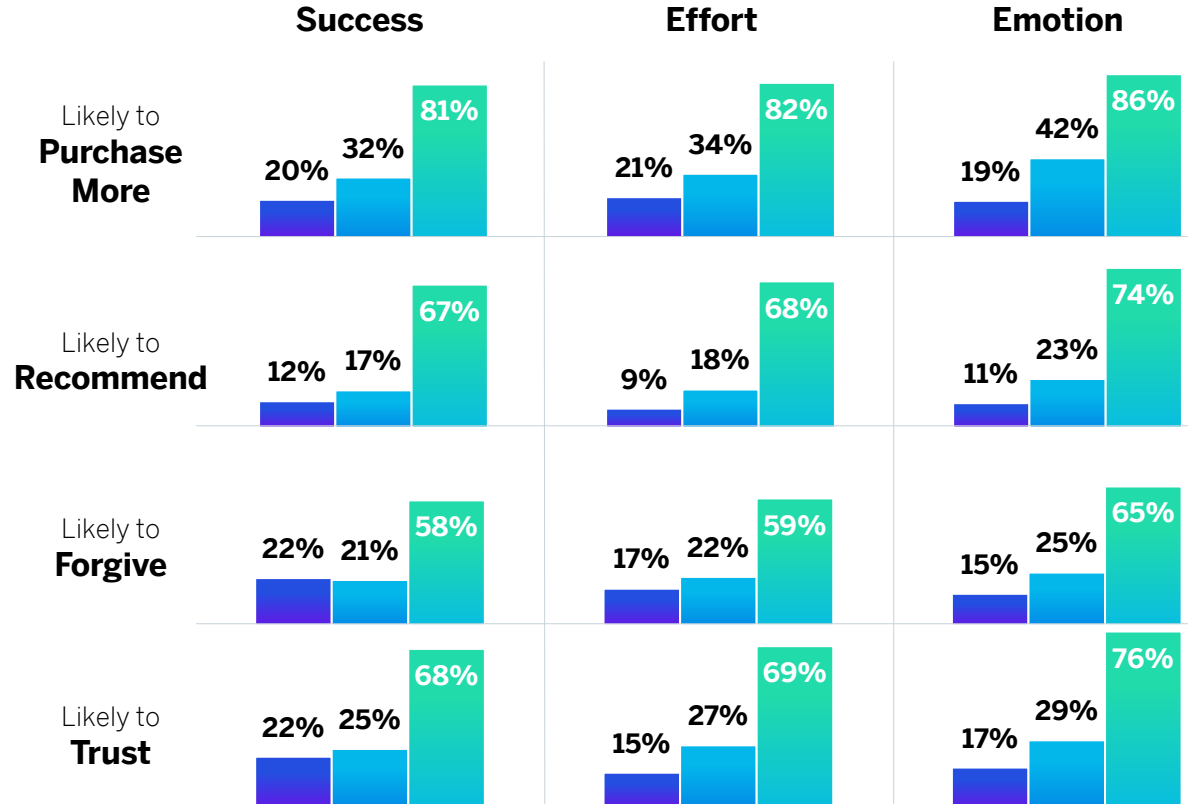
ABOUT

These charts show the likelihood for a streaming media consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 20 streaming media platforms

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success			Effort			Emotion		
Likely to **Purchase More**	20%	32%	81%	21%	34%	82%	19%	42%	86%
Likely to **Recommend**	12%	17%	67%	9%	18%	68%	11%	23%	74%
Likely to **Forgive**	22%	21%	58%	17%	22%	59%	15%	25%	65%
Likely to **Trust**	22%	25%	68%	15%	27%	69%	17%	29%	76%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: TV/Internet Service Provider

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 6.9x more likely to purchase more and 11.5x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 8.2x more likely to purchase more and 5.6x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 10x less likely to recommend and 4.5x less likely to forgive than those that had an easy experience.
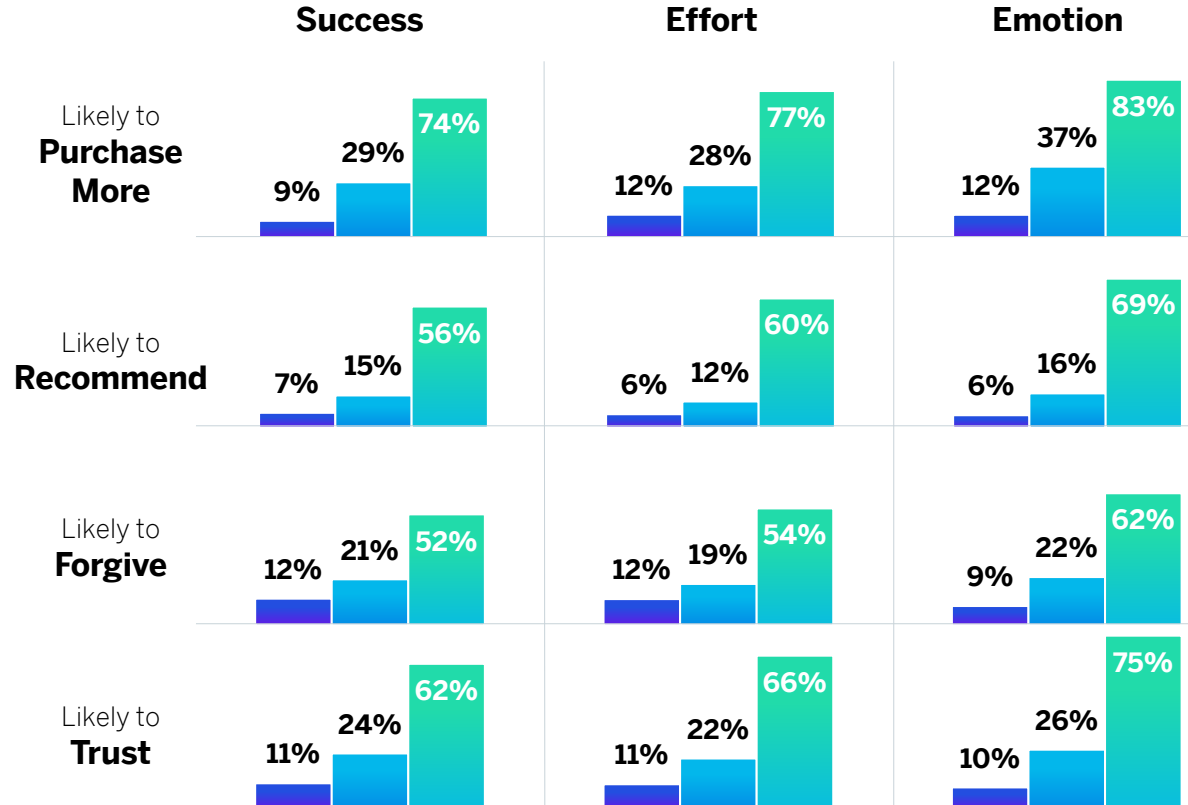
ABOUT

These charts show the likelihood for a TV/ISP consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings

Average across 9 TV/internet service providers

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success	Effort	Emotion
Likely to Purchase More	9% / 29% / 74%	12% / 28% / 77%	12% / 37% / 83%
Likely to Recommend	7% / 15% / 56%	6% / 12% / 60%	6% / 16% / 69%
Likely to Forgive	12% / 21% / 52%	12% / 19% / 54%	9% / 22% / 62%
Likely to Trust	11% / 24% / 62%	11% / 22% / 66%	10% / 26% / 75%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Utilities

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 4.2x more likely to purchase more and 8.6x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 6.7x more likely to purchase more and 3.2x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 5.6x less likely to recommend and 3.3x less likely to forgive than those that had an easy experience.
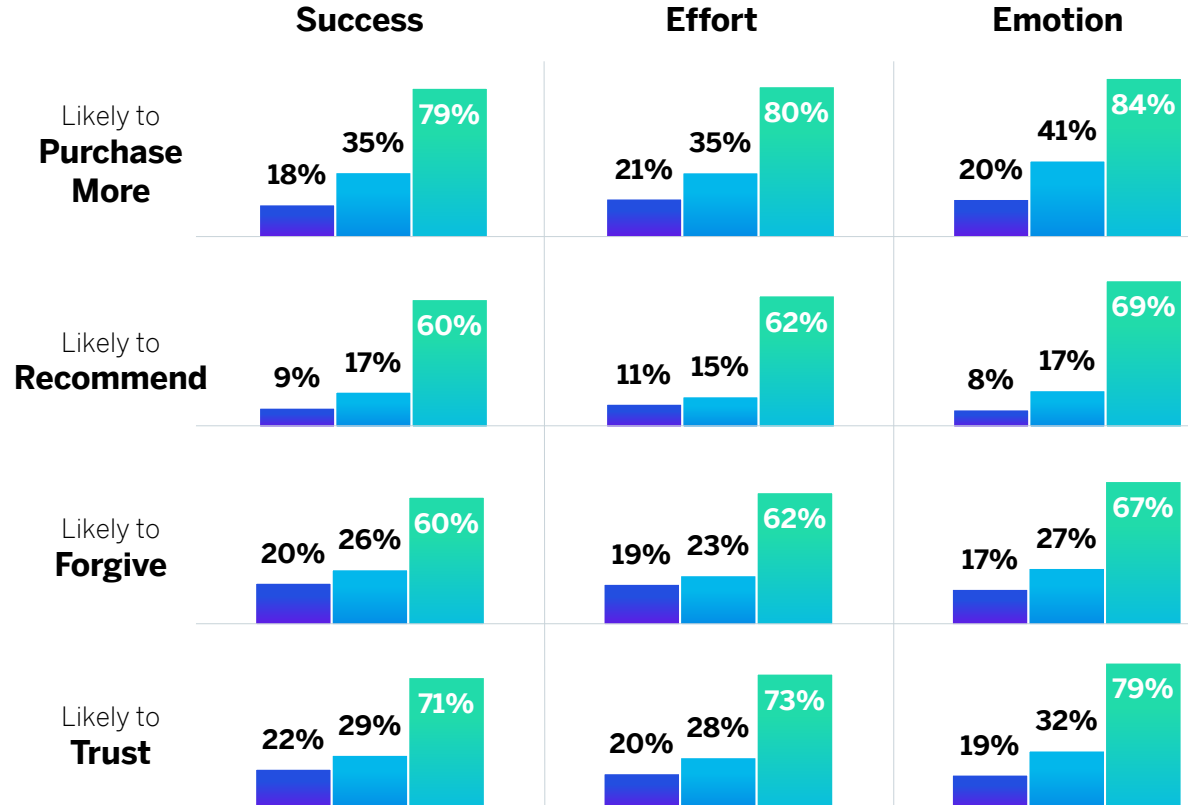
ABOUT

These charts show the likelihood for a utilities consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings

Average across 21 utility companies

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

	Success			Effort			Emotion		
Likely to **Purchase More**	18%	35%	79%	21%	35%	80%	20%	41%	84%
Likely to **Recommend**	9%	17%	60%	11%	15%	62%	8%	17%	69%
Likely to **Forgive**	20%	26%	60%	19%	23%	62%	17%	27%	67%
Likely to **Trust**	22%	29%	71%	20%	28%	73%	19%	32%	79%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Loyalty Metrics by CX Ratings: Wireless

KEY TAKEAWAYS

+ Auto consumers who were delighted by their most recent experience are 6.8x more likely to purchase more and 18.5x more likely to recommend than those that were upset by their experience.

+ Successful consumers are 4.5x more likely to purchase more and 4.2x more likely to trust than unsuccessful consumers.

+ Those that had a difficult experience are 8.4x less likely to recommend and 4.3x less likely to forgive than those that had an easy experience.
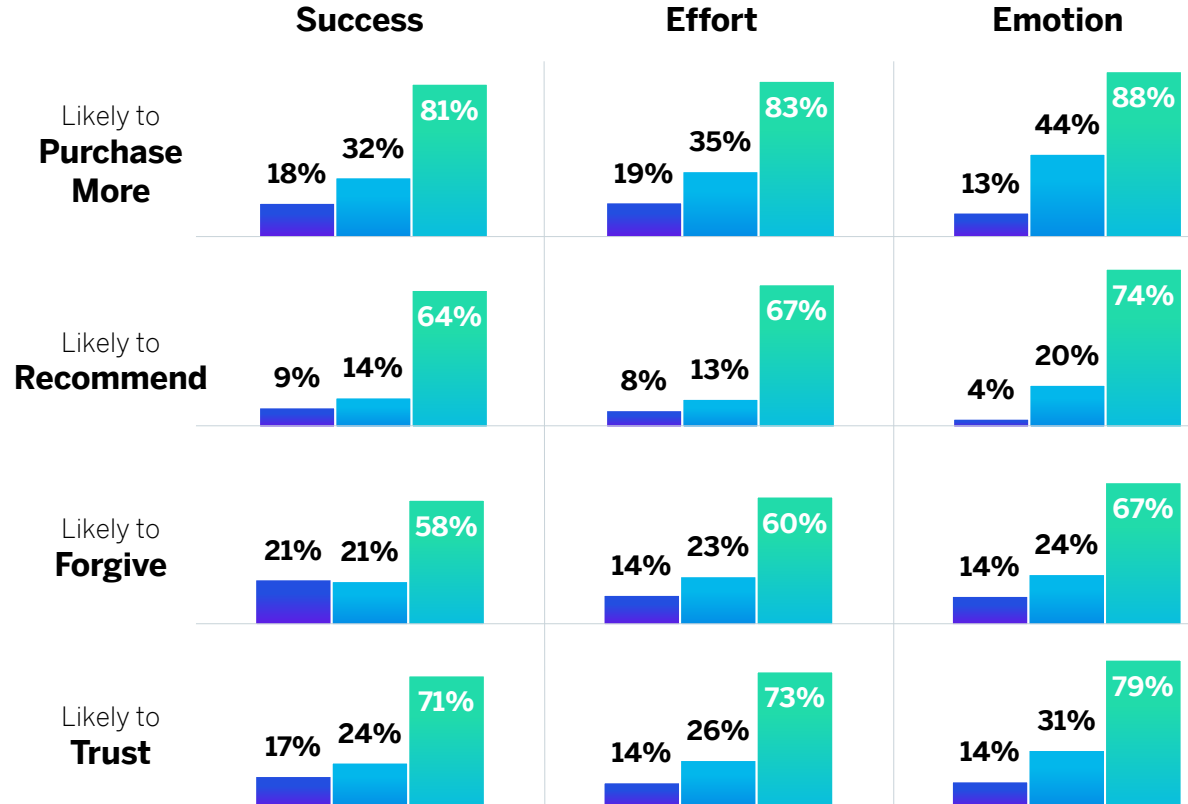
ABOUT

These charts show the likelihood for a wireless consumer to purchase more, recommend, forgive, and trust based on their success, effort, and emotion ratings.

Consumer Loyalty Based On Customer Experience Ratings
Average across 8 wireless companies

Legend: ■ Low Rating ■ Neutral Rating ■ High Rating

Success

	Low	Neutral	High
Likely to Purchase More	18%	32%	81%
Likely to Recommend	9%	14%	64%
Likely to Forgive	21%	21%	58%
Likely to Trust	17%	24%	71%

Effort

	Low	Neutral	High
Likely to Purchase More	19%	35%	83%
Likely to Recommend	8%	13%	67%
Likely to Forgive	14%	23%	60%
Likely to Trust	14%	26%	73%

Emotion

	Low	Neutral	High
Likely to Purchase More	13%	44%	88%
Likely to Recommend	4%	20%	74%
Likely to Forgive	14%	24%	67%
Likely to Trust	14%	31%	79%

Base: 9,055 US consumers
Source: Qualtrics XM Institute Q3 US Benchmark Study

Methodology

DATA CALCULATION

In **Figures 2-23**, we calculated the percentage of consumers likely to purchase more according to success/effort/emotion experience ratings for that industry by first summing the total number of consumers who said they are "somewhat" or "very likely" to purchase more and selected either one of the bottom three boxes on a 1-7 scale for success, effort, or emotion that correspond to a "low" rating, one of the top two boxes on the same 1-7 scale for a "high" rating, or one of the middle (4-5) boxes for a "neutral" rating. We then took each of those numbers and divided them by the total number of respondents that selected the corresponding low, neutral, or high range for success, effort, and emotion.

For example, if 371 auto consumers said they were "somewhat" or "very likely" to purchase more and rated the success of their experience as a 4 or a 5 (a "neutral" rating) and a total of 954 auto consumers rated the success of their experience a 4 or a 5, that means 39% of consumers that gave a neutral rating for the success of their experience are likely to purchase more.

The same calculations were performed for the likelihood to forgive and trust using 1-7 scales. Likelihood to recommend followed the same calculations using a scale of 0-10; a 0-6 is a "low" rating, a 7 or 8 is a "neutral" rating, and a 9 or 10 is a "high" rating.

In **Figure 1**, we take the average across all industries for the likelihood to purchase more, recommend, forgive, and trust according to each experience metric as calculated in figures 2-25.

Data was only calculated for companies that had 100+ respondents who had an experience with that company in the previous 90 days.

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