



DATA SNAPSHOT

Business Resilience Report, Q3 2022

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our first-ever Business Resilience Index, US consumers shared their thoughts on 20 industries' customer, product, and brand experiences, and US employees evaluated their experience with their current place of employment. Respondents evaluated three statements for each experience area, and we calculated a composite score for each experience area based on their answers. From our analysis, we found that:

- + **Organizations are best at creating a strong customer experience.** Of the four experience areas, respondents rated their customer experience highest, with an overall score across industries of 79%. Across all industries, organizations' brand experience was the lowest, with an overall score of 68%.
- + **Senior leaders report a better employee experience than managers and individual contributors.** Senior leaders gave their employee experience an overall score of 85%, higher than both managers (76%) and individual contributors (66%), and 13 percentage-points higher than the overall score of 72%.
- + **Grocery stores provided the best customer experience.** Consumers gave grocery stores a customer experience score of 85% and gave the lowest scores to auto dealerships (72%) and health insurance providers (73%).
- + **Technology companies scored well on product experience.** Computer or tablet makers (86%), software companies (86%), and electronics makers (85%) were the top three industries for product experience, propelled by their scores for the *innovative component*.
- + **Technology companies and financial companies earned the highest brand experience scores.** Software, electronics, and computer or tablet companies led the top five industries for brand experience, along with investment firms (78%) and banks (73%). Consumers found investment firms and banks to be the most trustworthy across all 20 industries.
- + **Gen Z consumers scored all experience areas the lowest.** The youngest group of consumers (18 to 24) gave low grades across all of their relationships with organizations. Their scores were particularly low compared with other age groups when it comes to product experience.
- + **45- to 64-year olds gave the lowest employee experience scores.** This group gave by far the lowest employee experience scores overall and for each of the three employee experience component scores.

STUDY KEY FACTS

- 2 US employee surveys
- 1 US consumer survey
- 5,041 employees
- 10,062 consumers
- 20 consumer industries
- 5 employee industries
- Conducted in Q2 of 2022

Q3 2022 Business Resilience Index

STUDY OVERVIEW

The data for this report comes from a series of 3 surveys Qualtrics XM Institute conducted simultaneously in the second quarter of 2022. Using online panels, XM Institute collected data from 10,062 US consumers, 2,501 US employees working at one of five targeted industries for a total of 500 employees per industry, and 2,540 US employees demographically representative of the US population according to the 2020 US Census for age, gender, household income, region, and ethnicity.

FIGURES IN THE REPORT

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Methodology

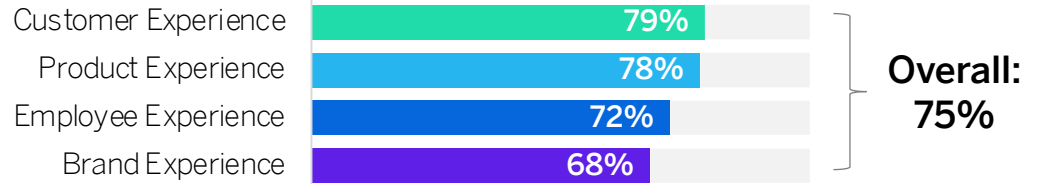
Overall Results

Q3 2022 Business Resilience Index

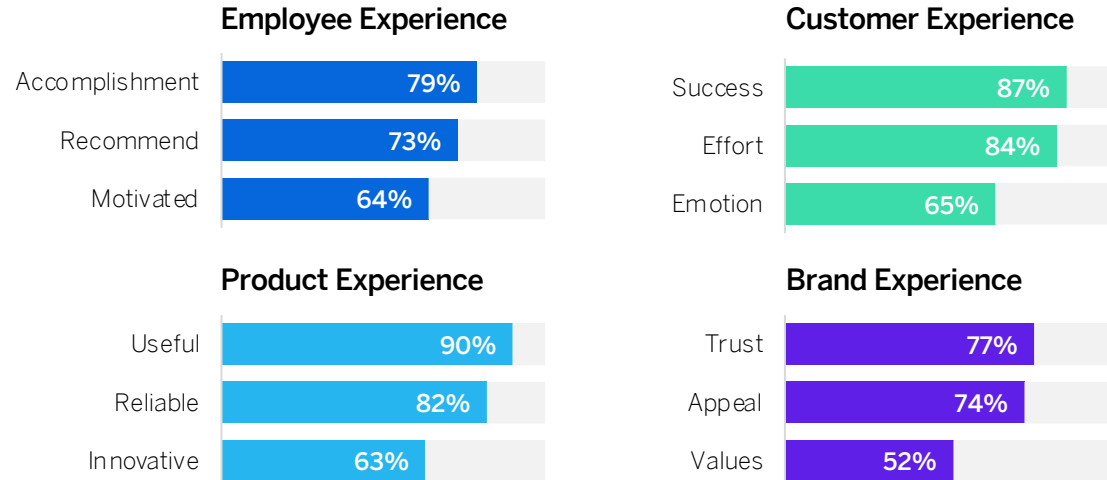
KEY TAKEAWAYS

- + The Q3 2022 Business Resilience Index has an overall score of 75%.
- + Corporations are best at creating a strong customer experience (79%) and are weakest at developing a strong brand experience (68%).
- + Consumers are most likely to agree that a company's products and services are useful to them, and least likely to agree that a company's values are consistent with their own.

Q3 2022 Business Resilience Index



Component Scores



ABOUT

These charts show the customer, product, employee, and brand experience index scores across all industries, and the cross-industry scores for each experience's components.

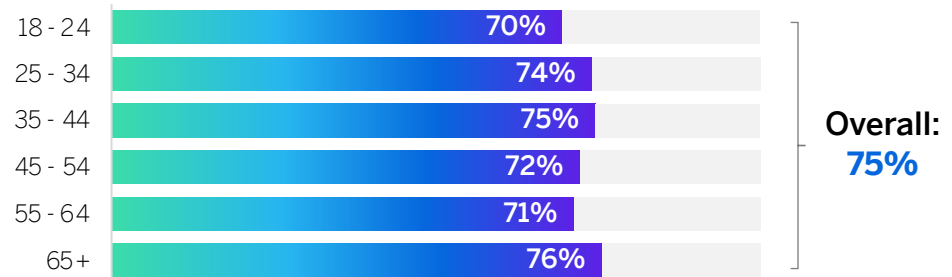
Overall Results By Age Group

Q3 2022 Business Resilience Index

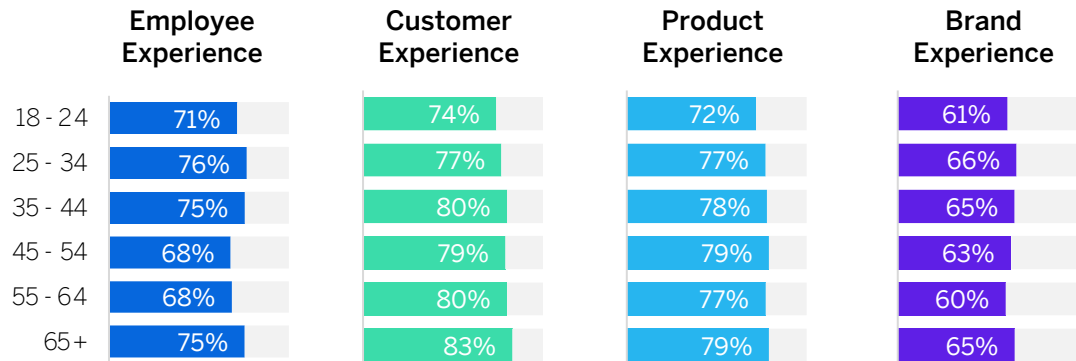
KEY TAKEAWAYS

- + The youngest group of consumers, ages 18 to 24, give low grades across all of their relationships with organizations. They are particularly lower than other age groups when it comes to product experience.
- + The oldest age group of consumers, age 65 and older, give the highest or near highest grades across all of their business relationships.
- + Consumers between the ages of 45 and 64 give the lowest grades for their employee experiences, and those in the older half of those consumers give the lowest grades for brand experience.

Q3 2022 Business Resilience Index



Experience Area Scores



ABOUT

These charts show employee, customer, product, and brand experience indexes by age, and composite scores by age.

Employee Experience By Age Group

Q3 2022 Business Resilience Index

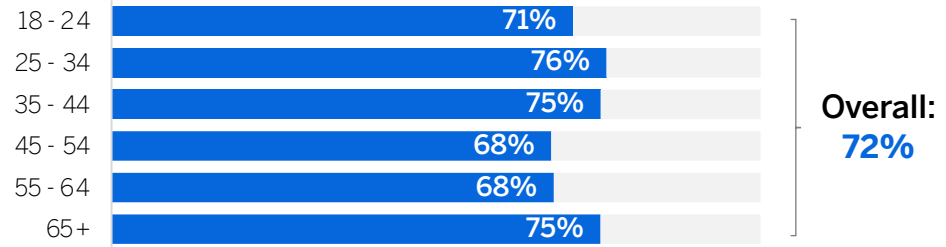
KEY TAKEAWAYS

- + Employees ages 45-64 scored their employers the lowest on the employee experience index (68%), while employees ages 25-34 scored their employers the highest, at 76%.
- + Employees ages 65+ are most likely to agree that their work gives them a sense of personal accomplishment, at 88% which is 9 percentage-points higher than the next highest age group.
- + Employees ages 35-44 are most likely to be motivated to contribute more than required, at 71%, closely followed by employees ages 25-34 (70%).

ABOUT

These charts show the employee experience index scores by age, and the employee experience index component scores by age.

Employee Experience Results By Age Group

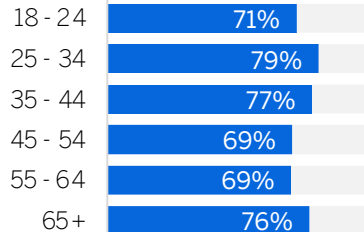


Employee Experience Components By Age Group

(Percentage that agree with statements)

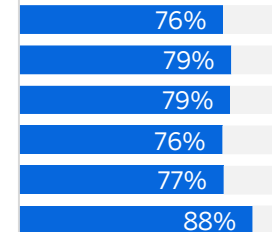
Recommend:

I would recommend the company I work for to people I know as a great place to work



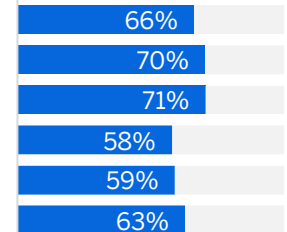
Accomplishment:

My work gives me a feeling of personal accomplishment



Motivated:

The company I work for motivates me to contribute more than is normally required to complete my work



Employee Experience By Job Level

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + Senior leaders scored their employers highest on the employee experience index, at 85%, while individual contributors scored their employers lowest, at 66%.
- + Individual contributors are 18 percentage-points less likely than senior leaders to agree that they would recommend their company as a great place to work.

ABOUT

These charts show the employee experience index scores by job level, and the employee experience components scores by job level.

Employee Experience Results By Job Level



Employee Experience Components By Job Level

(Percentage that agree with statements)

Recommend:

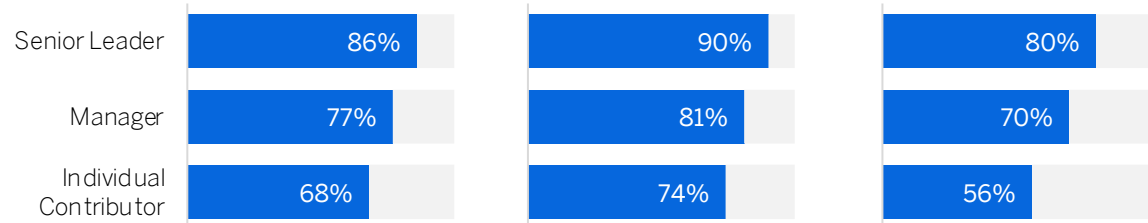
I would recommend the company I work for to people I know as a great place to work

Accomplishment:

My work gives me a feeling of personal accomplishment

Motivated:

The company I work for motivates me to contribute more than is normally required to complete my work



Employee Experience By Job Industry

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + Employees in front-line work like retail scored their employers the lowest on the employee experience index overall, at 66%, while those in skilled work scored highest (82%).
- + Employees in tech and skilled work are most likely to recommend their company as a great place to work (82%).
- + Those working in education are least motivated to contribute more than is normally required, at 58%.

ABOUT

These charts show the employee experience index scores according to the industry worked in, and the employee experience components scores according to the industry worked in.

Employee Experience Results By Job Industry

Percentage of consumers who agree with these statements:

- *I would recommend the company I work for to people I know as a great place to work* (**Recommend**)
- *My work gives me a feeling of personal accomplishment* (**Accomplishment**)
- *The company I work for motivates me to contribute more than is normally required to complete my work* (**Motivated**)

Industry	Recommend	Accomplishment	Motivated	Overall
Trades, factory, or construction	82%	86%	78%	82%
High Tech	82%	83%	72%	79%
Healthcare	75%	80%	63%	73%
Education	70%	80%	58%	70%
Hospitality, Food Service, or Retail (front-line workers)	70%	68%	60%	66%

Customer Experience By Industry

Q3 2022 Business Resilience Index

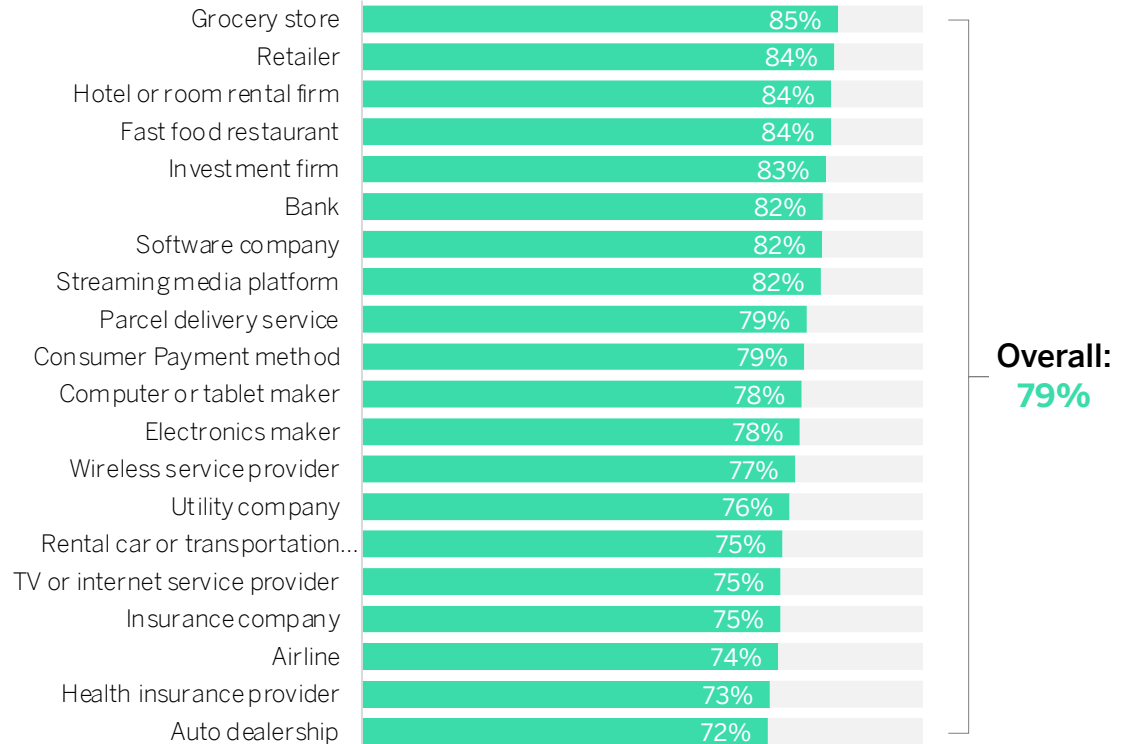
KEY TAKEAWAYS

- + Grocery stores (85%) and retailers (84%) received the highest customer experience index scores, while auto dealerships (72%) and health insurers (73%) scored the lowest.
- + Investment firms and banks scored in the top 6 of 20 industries.

ABOUT

This chart shows the customer experience index score by industry.

Customer Experience Results By Industry



Customer Experience By Industry (Top 10)

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + The top 10 scoring industries all scored lowest on the *emotion* component.
- + Consumers scored grocery stores highest for success (93%) and effort (92%) and scored software companies highest for emotion (75%).

ABOUT

This table shows the top 10 scoring industries for the customer experience index and the industries' customer experience component scores.

Customer Experience Results By Industry

Percentage of consumers who agree with these statements:

- **Success:** *I was able to accomplish what I wanted to do*
- **Effort:** *It was easy to interact with the organization*
- **Emotion:** *I felt good about the interaction*

	Success	Effort	Emotion	Overall
Grocery store	93%	92%	70%	85%
Fast food restaurant	91%	90%	70%	84%
Hotel or room rental firm	91%	89%	71%	84%
Retailer	91%	91%	71%	84%
Investment firm	89%	90%	69%	83%
Streaming media platform	90%	87%	68%	82%
Software company	87%	84%	75%	82%
Bank	90%	89%	67%	82%
Consumer Payment method	91%	87%	59%	79%
Parcel delivery service	89%	86%	63%	79%

Customer Experience By Industry (Bottom 10)

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + The bottom 10 industries all scored lowest on the *emotion* component.
- + Utility companies scored lowest on the *emotion* component overall (57%), followed by health insurers (58%).
- + Consumers had the least success with auto dealerships (78%) and found interactions with airlines the most difficult (76%).

ABOUT

This table shows the bottom 10 scoring industries for the customer experience index and the industries' customer experience component scores.

Customer Experience Results By Industry

Percentage of consumers who agree with these statements:

- **Success:** *I was able to accomplish what I wanted to do*
- **Effort:** *It was easy to interact with the organization*
- **Emotion:** *I felt good about the interaction*

	Success	Effort	Emotion	Overall
Electronics maker	82%	82%	70%	78%
Computer or tablet maker	85%	82%	69%	78%
Wireless service provider	86%	83%	63%	77%
Utility company	88%	84%	57%	76%
Insurance company	84%	81%	59%	75%
TV or internet service provider	83%	80%	61%	75%
Rental car or transportation company	82%	80%	62%	75%
Airline	85%	76%	61%	74%
Health insurance provider	83%	78%	58%	73%
Auto dealership	78%	79%	60%	72%

Customer Experience By Age Group

Q3 2022 Business Resilience Index

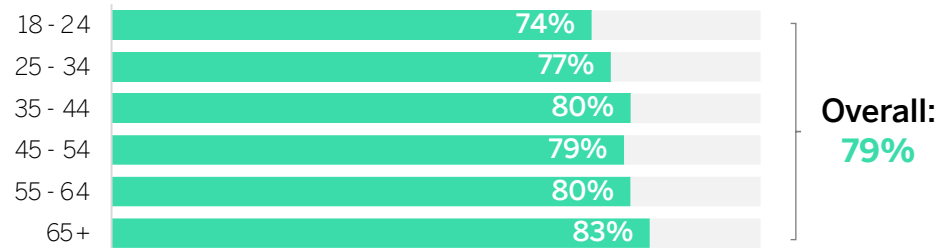
KEY TAKEAWAYS

- + Respondents ages 18-24 are least likely to say that it was easy to interact with organizations (77%) and that they were able to accomplish what they wanted to do.
- + Respondents ages 55-64 are least likely to say that they felt good about their interactions with any industry.
- + Overall, Gen Z respondents scored industries the lowest for their customer experience, while those 65 or older scored their experiences highest.

ABOUT

These charts show the customer experience index scores by age, and the customer experience index component scores by age.

Customer Experience Results By Age Group

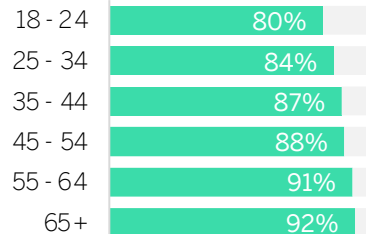


Customer Experience Components By Age Group

(Percentage that agree with statements)

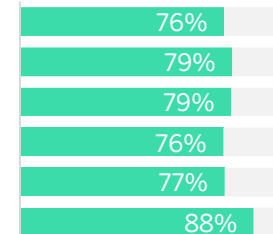
Success:

I was able to accomplish what I wanted to do



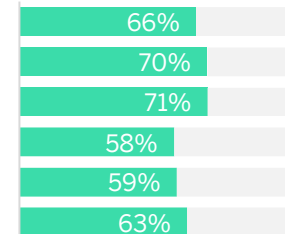
Effort:

It was easy to interact with the organization



Emotion:

I felt good about the interaction



Product Experience By Industry

Q3 2022 Business Resilience Index

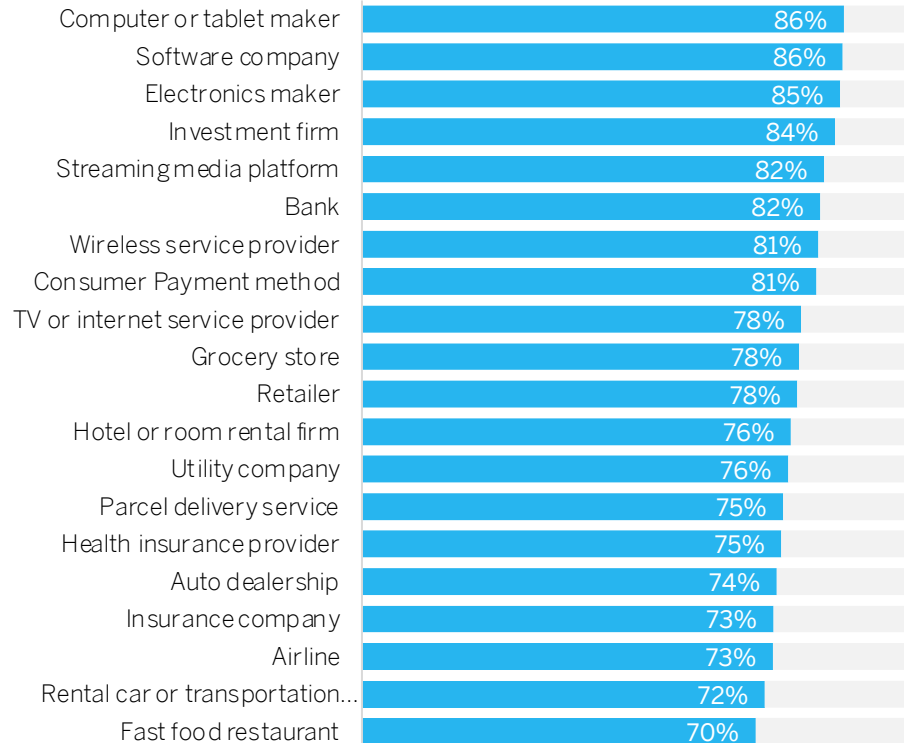
KEY TAKEAWAYS

- + Computer/tablet makers scored the highest on the product experience index (86%), followed by software companies (86%), and electronics makers (85%).
- + Consumers scored fast food restaurants lowest on product experience (70%), followed by rental car/transportation companies (72%), and airlines (73%).

ABOUT

This chart shows the product experience index score by industry.

Product Experience Results By Industry



Overall:
86%

Product Experience By Industry (Top 10)

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + All industries scored lowest on the *innovation* component except for electronics makers, which scored lowest on reliability.
- + Consumers most frequently agreed that investment firms' products and services are useful (95%), followed by grocery stores (93%).
- + Banks scored highest on reliability, at 89%, followed by investment firms (88%).

ABOUT

This table shows the top 10 scoring industries for the product experience index and the industries' product experience component scores.

Product Experience Results By Industry

Percentage of consumers who agree with these statements:

- **Useful:** *The organization's products and services are useful to me.*
- **Innovative:** *The organization's products and services are innovative.*
- **Reliable:** *The organization's products and services are reliable.*

	Useful	Innovative	Reliable	Overall
Software company	90%	83%	85%	86%
Computer or tablet maker	90%	82%	85%	86%
Electronics maker	89%	84%	83%	85%
Investment firm	95%	70%	88%	84%
Bank	92%	64%	89%	82%
Streaming media platform	88%	75%	84%	82%
Consumer Payment method	91%	66%	86%	81%
Wireless service provider	92%	70%	82%	81%
Grocery store	93%	55%	85%	78%
TV or internet service provider	90%	67%	77%	78%

Product Experience By Industry (Bottom 10)

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + All 10 industries scored lowest on the *innovative* component.
- + Consumers found airlines to be the least reliable (73%), followed by rental care/transportation companies and fast food restaurants, at 76%.
- + Consumers were least likely to agree that fast food restaurants are useful, at 83%. Auto dealerships were the second least-useful industry, at 85%.

ABOUT

This table shows the bottom 10 scoring industries for the product experience index and the industries' product experience component scores.

Product Experience Results By Industry

Percentage of consumers who agree with these statements:

- **Useful:** *The organization's products and services are useful to me.*
- **Innovative:** *The organization's products and services are innovative.*
- **Reliable:** *The organization's products and services are reliable.*

	Useful	Innovative	Reliable	Overall
Retailer	91%	58%	84%	78%
Utility company	93%	52%	83%	76%
Hotel or room rental firm	90%	55%	84%	76%
Health insurance provider	91%	54%	79%	75%
Parcel delivery service	92%	54%	79%	75%
Auto dealership	85%	58%	78%	74%
Airline	90%	57%	73%	73%
Insurance company	88%	51%	81%	73%
Rental car or transportation company	86%	53%	76%	72%
Fast food restaurant	83%	51%	76%	70%

Product Experience By Age Group

Q3 2022 Business Resilience Index

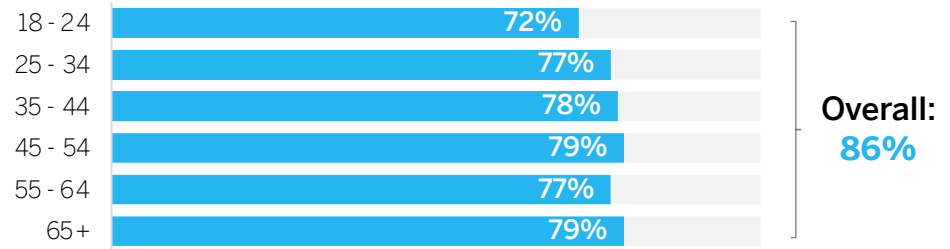
KEY TAKEAWAYS

- + Respondents ages 18-24 are least likely to say that organizations' product and services are useful or reliable.
- + Respondents ages 55 or older are least likely to say that they think organizations' products and services are innovative.
- + Overall, Gen Z respondents scored industries the lowest for their product experience, while those 45-54 and those 65 or older scores them highest.

ABOUT

These charts show the product experience index scores by age, and the product experience index component scores by age.

Product Experience Results By Age Group



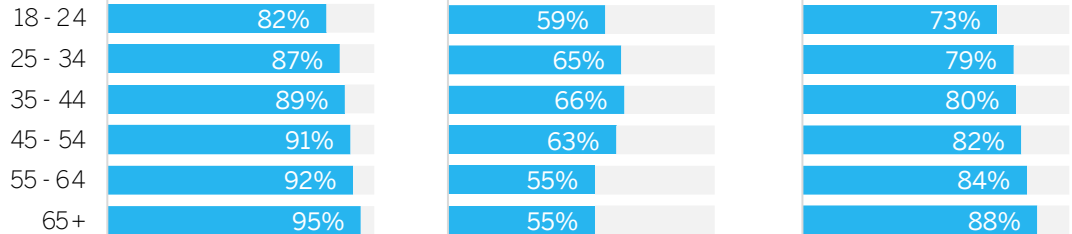
Product Experience Components By Age Group

(Percentage that agree with statements)

Useful:
The organization's products and services are useful to me

Innovative:
The organization's products and services are innovative

Reliable:
The organization's products and services are reliable



Brand Experience By Industry

Q3 2022 Business Resilience Index

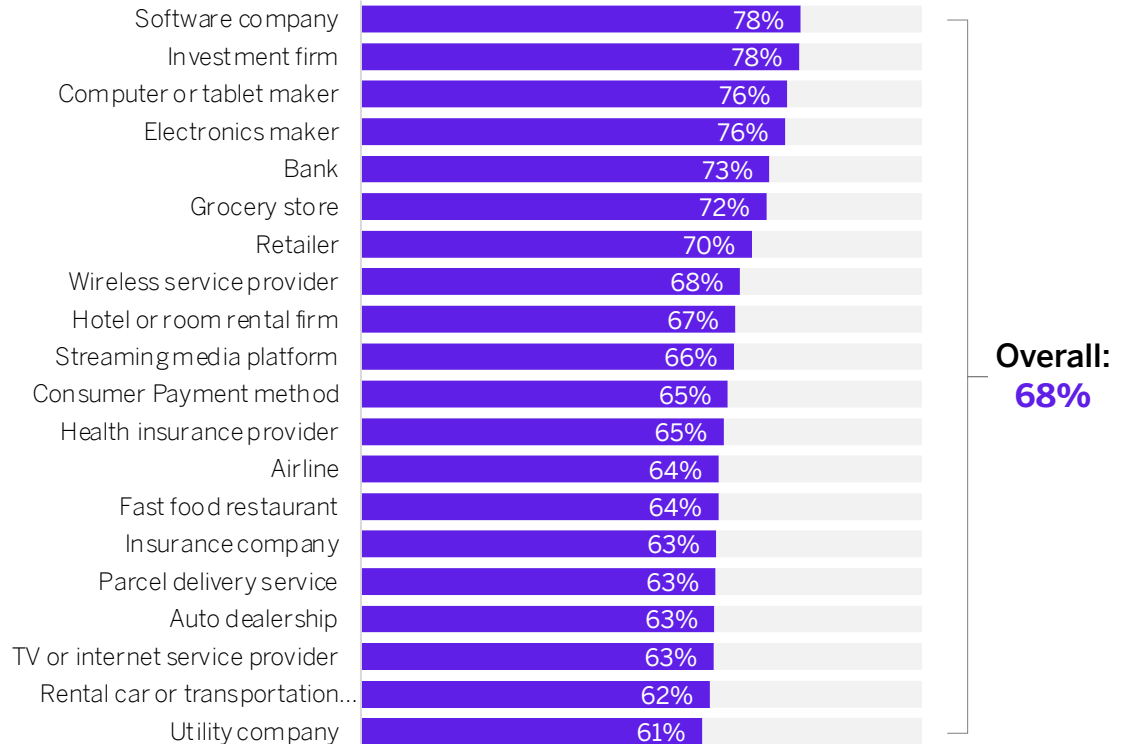
KEY TAKEAWAYS

- + Consumers gave software companies the top spot on the brand experience index, with a score of 78%. Investment firms (78%) and computer or tablet makers (76%) scored next highest.
- + Utility companies (61%) and rental car or transportation companies (62%) received the lowest brand experience index scores.

ABOUT

This chart shows the brand experience index score by industry.

Brand Experience Results By Industry



Brand Experience By Industry (Top 10)

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + All 10 industries scored lowest on the *values* component. Consumers were most likely to say that software companies' brands are consistent with their own.
- + Consumers found investment firms to be the most trustworthy, at 87%, and their brands most appealing (84%).
- + Electronics makers, computer or tablet makers, and software companies all scored second highest (83%) for brand appeal.

ABOUT

This table shows the top 10 scoring industries for the brand experience index and the industries' brand experience component scores.

Brand Experience Results By Industry

Percentage of consumers who agree with these statements:

- **Trust:** *The organization is trustworthy.*
- **Appeal:** *The organization's brand appeals to me.*
- **Values:** *The organization's values are consistent with my own.*

	Trust	Appeal	Values	Overall
Software company	82%	83%	71%	78%
Investment firm	87%	84%	63%	78%
Electronics maker	82%	83%	62%	76%
Computer or tablet maker	82%	83%	63%	76%
Bank	85%	75%	59%	73%
Grocery store	81%	80%	55%	72%
Retailer	78%	81%	50%	70%
Wireless service provider	77%	74%	51%	68%
Hotel or room rental firm	77%	75%	48%	67%
Streaming media platform	74%	80%	46%	66%

Brand Experience By Industry (Bottom 10)

Q3 2022 Business Resilience Index

KEY TAKEAWAYS

- + All 10 industries scored lowest on the *values* component. Consumers least frequently agreed that fast food companies' values are consistent with their own.
- + Consumers were least likely to agree that utility companies' brand appeals to them (59%), followed by insurance companies' brand (65%).
- + According to consumers, auto dealerships are the least trustworthy, at 66%.

ABOUT

This table shows the bottom 10 scoring industries for the brand experience index and the industries' brand experience component scores.

Brand Experience Results By Industry

Percentage of consumers who agree with these statements:

- **Trust:** *The organization is trustworthy.*
- **Appeal:** *The organization's brand appeals to me.*
- **Values:** *The organization's values are consistent with my own.*

	Trust	Appeal	Values	Overall
Health insurance provider	75%	66%	53%	65%
Consumer Payment method	81%	69%	46%	65%
Fast food restaurant	68%	77%	45%	64%
Airline	72%	72%	47%	64%
TV or internet service provider	71%	70%	48%	63%
Auto dealership	66%	74%	49%	63%
Parcel delivery service	79%	67%	44%	63%
Insurance company	74%	65%	51%	63%
Rental car or transportation company	72%	66%	49%	62%
Utility company	77%	59%	46%	61%

Brand Experience By Age Group

Q3 2022 Business Resilience Index

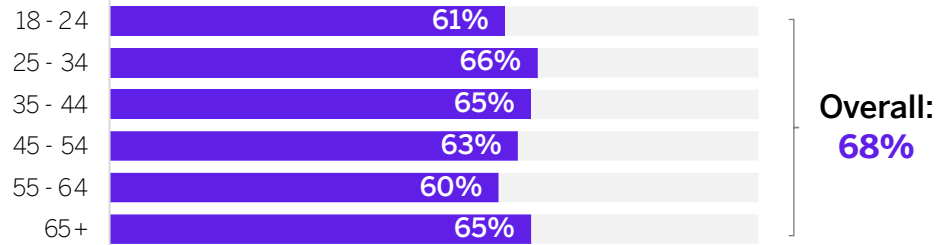
KEY TAKEAWAYS

- + Respondents ages 18-24 are least likely to say that they find organizations trustworthy or find their brands appealing.
- + Respondents ages 55-64 are least likely to say that organizations' values are consistent with their own, followed by respondents ages 65 or older.
- + Overall, respondents ages 55 to 64 scored industries the lowest for their brand experience, while those 25 to 34 scored them highest.

ABOUT

These charts show the brand experience index scores by age, and the brand experience index component scores by age.

Brand Experience Results By Age Group



Brand Experience Components By Age Group

(Percentage that agree with statements)

Trust:

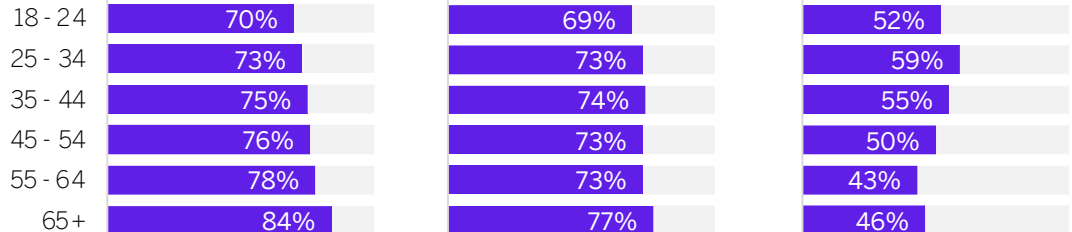
The organization is trustworthy

Appeal:

The organization's brand appeals to me

Values:

The organization's values are consistent with my own



Methodology

Q3 2022 Business Resilience Index

QUESTIONS USED FOR INDEX

To develop the index, we asked consumers the degree to which they agree with (*Strongly disagree, Disagree, Neither agree nor disagree, Agree, Strongly agree*) these 12 statements (three per component):

Employee Experience:

- *I would recommend the company I work for to people I know as a great place to work* (**Recommend**)
- *My work gives me a feeling of personal accomplishment* (**Accomplishment**)
- *The company I work for motivates me to contribute more than is normally required to complete my work* (**Motivated**)

Customer Experience:

- *I was able to accomplish what I wanted to do* (**Success**)
- *It was easy to interact with the organization* (**Effort**)
- *I felt good about the interaction* (**Emotion**)

Product Experience:

- *The organization's products and services are useful to me* (**Useful**)
- *The organization's products and services are innovative* (**Innovative**)
- *The organization's products and services are reliable* (**Reliable**)

Brand Experience:

- *The organization is trustworthy* (**Trust**)
- *The organization's brand appeals to me* (**Appeal**)
- *The organization's values are consistent with my own* (**Values**)

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Methodology

Q3 2022 Business Resilience Index

DATA CALCULATIONS

The overall Business Resilience Index is made up of four experience areas: Employee Experience (EX), Customer Experience (CX), Brand Experience (BX), and Product Experience (PX). For each of those experience areas, consumers were asked the degree to which they agree with three statements, and we calculated an average agreement level for each of those areas. The overall index is an average of those four experience areas.

In **Figure 1**, we show the cross-industry average employee experience, customer experience, product experience, and brand experience scores as an average of the scores calculated in **Figures 2, 5, 8, and 11** and show the cross-industry experience areas scores by taking the average for each experience area.

In **Figure 2**, we show the cross-industry average employee, customer, product, and brand experience scores by age as an average of the scores calculated in **Figures 3, 9, 13, and 17**.

In **Figure 3**, we calculated each age group's employee experience score by finding the percentage of employees that said they "agree" or "strongly agree" with each EX statement, then taking the average of those three scores. We repeated these calculations for customer, product, and brand experience by age in **Figures 9, 13, and 17**, respectively. The overall EX score was calculated based on weighting the answers proportionally to the US population for both age and gender. We repeated these calculations, unweighted, in **Figure 4** for respondents' job levels.

In **Figure 5**, we repeat the calculations as done in Figures 2 and 3 for a select group of job types, each based on 500 or more responses.

In **Figure 6**, we calculated a customer experience score for a set of pre-defined industries by first finding the percentage of consumers that said they "agree" or "strongly agree" with each CX statement, and then taking the average of those three scores. The overall CX score was the average of the scores across the industries. We repeated this calculation for the product experience scores in **Figure 10** based on statements and percentages as shown in **Figures 11 and 12** and for the brand experience scores in **Figure 14** based on statements and percentages in **Figures 15 and 16**.

We conducted two employee surveys, one with the intention to gather data from a demographically representative sample of employees and one to gather data from employees in key industries.

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