Qualtrics XM institute™

DATA SNAPSHOT

Global Study: Consumer Satisfaction and Loyalty

Moira Dorsey, XMP
Principal XM Catalyst

Talia Quaadgras
Senior Research Associate

Julia Chang
Senior Research Associate

November 2022

Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our latest global consumer study, consumers from 29 countries rated their recent experiences with 20 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 this study and the global study that we conducted in Q3 of 2021, we were able to analyze the current state of customer experience and year-over-year changes to consumer sentiment. We found that:

+ **Global consumer satisfaction remains steady – on average.** Consumer satisfaction – on average across countries – increased by just 0.5 percentage-points from the previous year. Indian and Vietnamese consumers' satisfaction increased the most, bringing them to the top of the satisfaction rankings, while Japanese consumers' satisfaction lags more than 20 percentage-points behind the global average of 77%.

+ **Consumer trust and advocacy are up – barely.** *Globally, c*onsumers' likelihood to trust and recommend increased from 2021 by under 1 %-point each. Spanish and Belgian consumers' loyalty metrics increased the most, while Vietnamese industries experienced more than a 3 %-point decrease in both trust and advocacy.

+ **Satisfaction stayed low for government agencies and public utilities.** Consumers were least frequently satisfied by their government agency and public utility experiences in 2022. In fact, they were most frequently dissatisfied with these industries. With an under 1 %-point increase in satisfaction for government agencies and a drop in satisfaction for public utilities, these industries maintained their low standing from the previous year.

+ **Higher education received the greatest increases in satisfaction and loyalty.** Out of 17 industries, consumer satisfaction increased the most (3 %-points) for colleges and universities. Coinciding with this rise in favor, consumers are 5.1 %-points more likely to rebuy, 4 %-points more likely to trust, and 5 %-points more likely to recommend their college or university in 2022 than they were in 2021.

STUDY KEY FACTS

- Global consumer study
- Online panel
- Conducted in Q3 2022
- 29 countries
- 20 industries
- 33,093 consumers

Global Study: Customer Experience Trends, 2023

Qualtrics
XM institute™

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2022. Using an online survey, XM Institute collected data from 33,093 consumers across 29 countries: Argentina, Australia, Belgium, Brazil, Canada, China, Colombia, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Africa, South Korea, Spain, Taiwan, Thailand, the United Arab Emirates, the United Kingdom, the United States, and Vietnam.

XM Institute surveyed approximately 1,200 consumers from each of the countries except those listed below. 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.

The following countries' sample sizes are as follows:
Hong Kong, 693. Malaysia, 757. New Zealand, 983. Singapore, 1112. South Africa, 871. Taiwan, 1143.

FIGURES IN THE REPORT

Consumer Satisfaction Levels by Country

Qualtrics XM institute™

KEY TAKEAWAYS

+ Across all countries and industries surveyed, consumers were satisfied with 77% of their recent experiences.

+ Vietnamese consumers were most satisfied with their recent experiences (90%), while Japanese consumers reported the least satisfaction with their recent experiences (56%).

ABOUT

This chart shows how consumers from each surveyed country rate their satisfaction levels with the organizations they recently interacted with.

Thinking about the companies that you have recently interacted with, how satisfied are you with the experiences they deliver?

(Percentage giving a 4- or 5- stars out of 1 - 5-star satisfaction ratings)
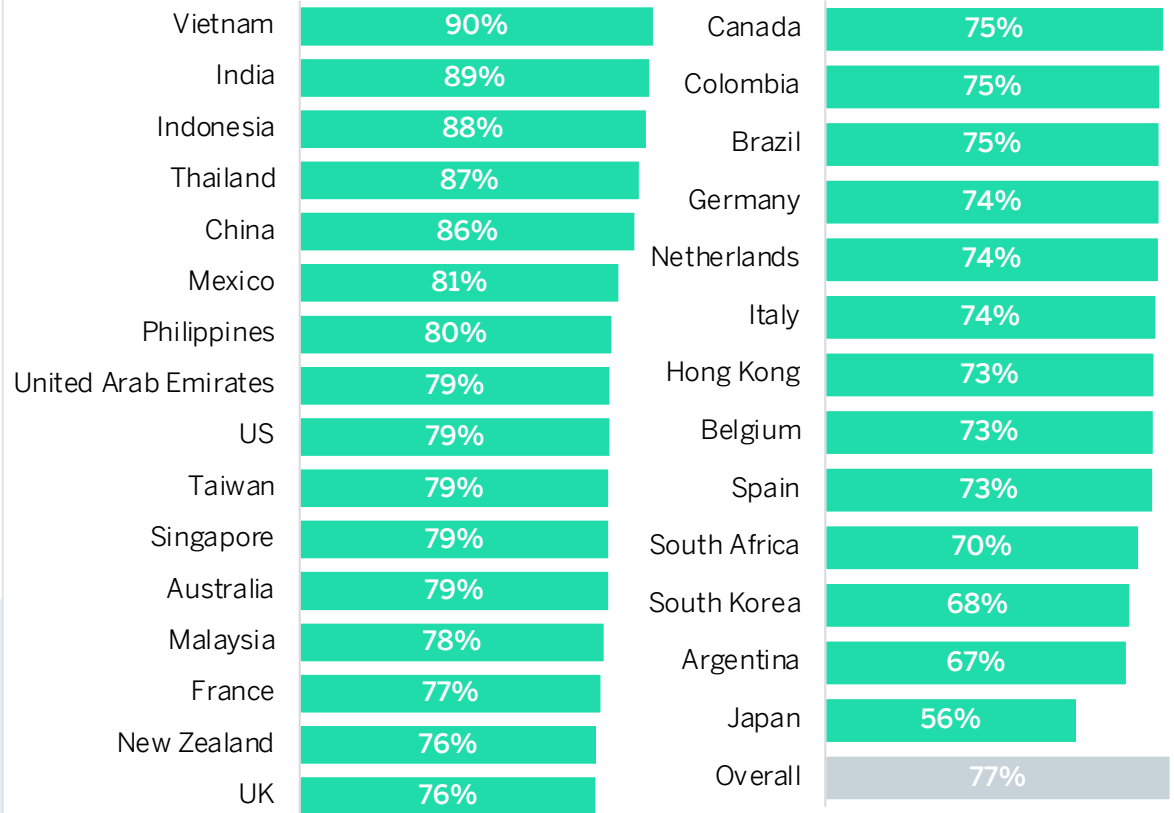
Country	%		Country	%
Vietnam	90%		Canada	75%
India	89%		Colombia	75%
Indonesia	88%		Brazil	75%
Thailand	87%		Germany	74%
China	86%		Netherlands	74%
Mexico	81%		Italy	74%
Philippines	80%		Hong Kong	73%
United Arab Emirates	79%		Belgium	73%
US	79%		Spain	73%
Taiwan	79%		South Africa	70%
Singapore	79%		South Korea	68%
Australia	79%		Argentina	67%
Malaysia	78%		Japan	56%
France	77%		Overall	77%
New Zealand	76%			
UK	76%			

Consumer Satisfaction Level YoY Change by Country

KEY TAKEAWAYS

+ Overall, consumers were 0.5 percentage-points more satisfied with their recent experiences this year compared to last year.

+ Indian consumers' satisfaction levels increased the most compared to their 2022 satisfaction levels (+6.1 %-points), while South Korean consumers' satisfaction decreased the most (-2.8 %-points).

+ Mexican, Malaysian, and Italian consumers' satisfaction levels changed the least, with just a 0.1 %-point increase from last year.

ABOUT

This chart shows the year-over-year change in consumers satisfaction (4 or 5 stars) in each country, across all industries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Satisfaction
(Percentage-point change from 2022 consumer satisfaction levels to 2023)

Country	Change
India	+6.1
Vietnam	+5.3
Thailand	+4.5
Australia	+4.3
Indonesia	+2.8
France	+2.4
Netherlands	+2.2
China	+2.2
Philippines	+2.0
Belgium	+1.7
Singapore	+1.3
New Zealand	+0.6
Canada	+0.6

Country	Change
Japan	+0.3
Italy	+0.1
Malaysia	+0.1
Mexico	+0.1
Spain	-0.3
UK	-0.5
US	-1.0
Brazil	-1.5
Germany	-1.8
Hong Kong	-2.3
South Korea	-2.8
Overall	+0.5

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
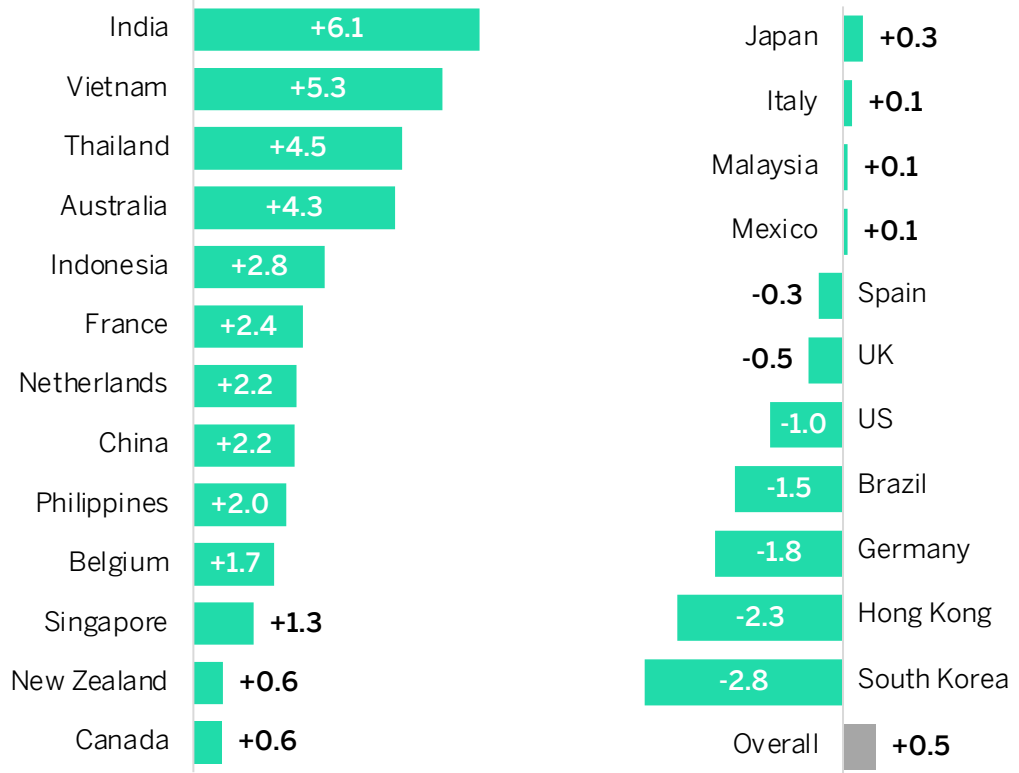
Consumer Satisfaction Levels by Industry

KEY TAKEAWAYS

+ Across all countries, consumers were most frequently highly satisfied with their streaming experiences (51%), and least frequently with their public utility experiences (31%).

+ Consumers were most dissatisfied with their recent experiences with government agencies (14%) and public utilities (10%).

ABOUT

This chart shows how consumers from each surveyed country rate their satisfaction levels with the organizations they recently interacted with.

Thinking about the companies that you have recently interacted with, how satisfied are you with the experiences they deliver?

■ 5 stars ■ 4 stars ■ 3 stars ■ 1-2 stars

Industry	5 stars	4 stars	3 stars	1-2 stars
Streaming	51%	36%	12%	
College/ University	50%	32%	14%	
Parcel Delivery	48%	34%	14%	
Electronics maker	48%	37%	13%	
Hotel	48%	37%	13%	
Property Insurance	46%	34%	16%	
Airline	46%	33%	15%	
Auto dealer	46%	34%	15%	
Health Insurance	45%	34%	16%	
Online Retailer	45%	38%	14%	
Bank	43%	33%	18%	6%
Supermarket	42%	39%	16%	
Fast Food	41%	38%	18%	
Department Store	40%	41%	17%	
Credit Card Provider	39%	34%	20%	6%
Hospital/Medical Clinic	39%	35%	20%	6%
ISP	37%	35%	21%	7%
Mobile Phone Provider	36%	35%	21%	7%
Government Agency	34%	29%	23%	14%
Public Utility	31%	33%	26%	10%

Consumer Satisfaction Level YoY Change by Industry

KEY TAKEAWAYS

+ Across all countries, consumers' satisfaction increased the most from last year with colleges and universities (3 %-pts) and parcel delivery service (2.6 %-pts).

+ Fast food companies, public utilities, supermarkets, and hospitals/medical clinics received lower consumer satisfaction ratings this year compared to last year.

+ Consumer satisfaction changed the least with streaming companies and department stores, each only experiencing a 0.1 %-pt increase from the previous year.

ABOUT

This chart shows the year-over-year change in consumers satisfaction (4 or 5 stars) for each industry, across all countries. Data is only reported for the 24 countries and 17 industries for which we collected data on in both 2021 and 2022.

Year-over-Year Change in Consumer Satisfaction
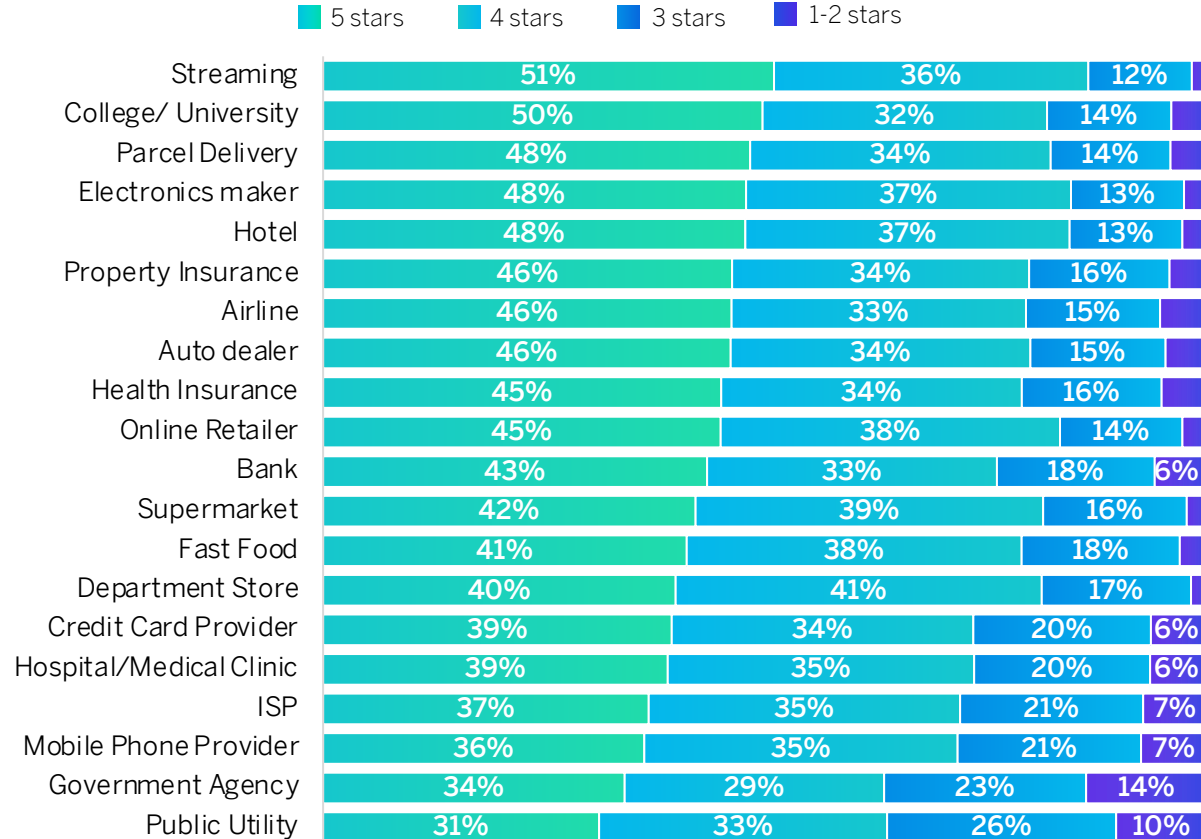(Percentage-point change from 2022 consumer satisfaction levels to 2023)

Industry	Change
College/ University	+3.0
Parcel Delivery	+2.6
Health Insurance	+2.4
ISP	+1.8
Airline	+1.3
Bank	+1.2
Mobile Phone Provider	+0.9
Online Retailer	+0.9
Credit Card Provider	+0.6
Government Agency	+0.4
Property Insurance	+0.3
Department Store	+0.1
Streaming	+0.1
Hospital/Medical Clinic	-0.4
Supermarket	-1.5
Public Utility	-1.8
Fast Food	-2.4

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
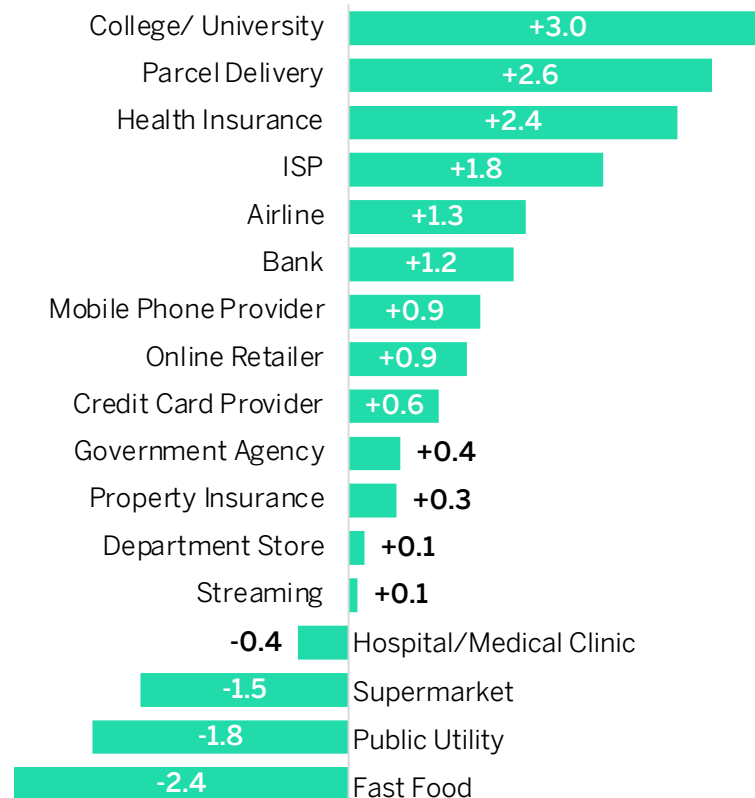
Consumer Satisfaction By Country and Industry (Part 1)

KEY TAKEAWAYS

+ Japanese consumers were least satisfied with their recent department store, fast food, online retail, and supermarket experiences compared to consumers from all other countries surveyed.

+ Indonesian consumers reported the highest satisfaction with their department store, fast food, and electronics maker experiences.

+ Electronics makers received their lowest satisfaction ratings from their Belgian consumers (67%).

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are satisfied with their most recent experience

Highest Rating
Lowest Rating

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	76%	77%	71%	68%	72%
Australia	78%	78%	83%		83%
Belgium	79%	74%	84%	67%	85%
Brazil	82%	85%	84%	74%	85%
Canada	80%	81%	88%		85%
China	87%	78%	82%	89%	81%
Colombia	85%	88%	75%	82%	83%
France	78%	78%	87%		84%
Germany	80%	74%	89%	83%	84%
Hong Kong	79%	64%	70%	77%	72%
India	88%	88%	89%	90%	84%
Indonesia	91%	92%	88%	96%	92%
Italy	83%	75%		79%	84%
Japan	60%	55%	64%		55%
Malaysia	78%	83%	85%	86%	79%
Mexico	84%	85%	84%	93%	87%
Netherlands	83%	69%	85%	78%	87%
New Zealand	72%	74%	84%		76%
Philippines	88%	90%	78%	76%	90%
Singapore	75%	78%	78%	89%	81%
South Africa	74%	82%	78%	72%	83%
South Korea	76%	71%	73%	67%	70%
Spain	84%	78%	89%		87%
Taiwan	83%	77%	79%	89%	81%
Thailand	86%	88%	86%	95%	84%
UK	79%	77%	88%		84%
United Arab Emirates	78%	81%	81%	76%	82%
US	82%	78%	90%		87%
Vietnam	89%	83%	87%	93%	97%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Satisfaction By Country and Industry (Part 2)

KEY TAKEAWAYS

+ Japanese consumers were the least satisfied out of all countries' consumers with their experiences with all five of these industries. They were least satisfied with their banking experience (40%).

+ Vietnamese consumers reported the highest levels of satisfaction with their banking, credit card, mobile phone, and internet service experiences, while Thai consumers were most satisfied with their streaming experiences.

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are satisfied with their most recent experience

■ Highest Rating
■ Lowest Rating

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	67%	57%	65%	55%	87%
Australia	78%	79%	73%	71%	87%
Belgium	73%	66%	69%	69%	84%
Brazil	76%	67%	56%	72%	91%
Canada	82%	77%	75%	71%	85%
China	86%	88%	82%	89%	87%
Colombia	70%	71%	67%	66%	86%
France	78%	74%	67%	68%	90%
Germany	76%	79%	68%	72%	89%
Hong Kong	76%	72%	71%	72%	77%
India	89%	90%	89%	88%	90%
Indonesia	92%	86%	84%	83%	93%
Italy	69%	73%	67%	69%	86%
Japan	40%	48%	46%	46%	74%
Malaysia	81%	74%	77%	71%	86%
Mexico	82%	73%	81%	78%	89%
Netherlands	79%	75%	69%	69%	77%
New Zealand	76%	69%	73%	75%	83%
Philippines	82%	78%	77%	60%	88%
Singapore	75%	76%	72%	78%	81%
South Africa	76%	67%	68%	73%	81%
South Korea	69%	64%	61%	64%	78%
Spain	62%	63%	70%	70%	92%
Taiwan	76%	77%	80%	80%	85%
Thailand	86%	85%	80%	81%	95%
UK	83%	72%	77%	70%	85%
United Arab Emirates	81%	74%	75%	74%	84%
US	85%	79%	76%	74%	89%
Vietnam	96%	91%	90%	91%	93%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Satisfaction By Country and Industry (Part 3)

KEY TAKEAWAYS

+ Vietnamese consumers found the highest level of satisfaction with their airline, hotel, parcel delivery, and property insurer experiences while Japanese consumers reported the least satisfaction with these industries.

+ Argentinian consumers were least satisfied with their most recent auto dealer experience (57%), while Thai consumers enjoyed the highest level of satisfaction with auto dealers (95%).

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are satisfied with their most recent experience

■ Highest Rating
■ Lowest Rating

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	71%	81%	57%	83%	
Australia	80%	83%	82%	80%	82%
Belgium	69%	85%	74%	84%	
Brazil	76%	80%	76%	89%	68%
Canada	62%	83%	71%	82%	74%
China	85%	89%	87%	89%	84%
Colombia	77%	86%	73%	83%	
France	73%	83%	82%	78%	64%
Germany	68%	84%	78%	78%	74%
Hong Kong	79%	76%		79%	77%
India	96%	88%	90%	86%	92%
Indonesia	92%	91%	84%	88%	89%
Italy	72%	85%	78%	86%	69%
Japan	59%	71%	67%	61%	50%
Malaysia	76%	87%	68%	87%	75%
Mexico	83%	90%	83%	92%	84%
Netherlands	69%	84%	80%	75%	
New Zealand	79%	78%	76%	80%	79%
Philippines	84%	87%	74%	88%	74%
Singapore	83%	84%	85%	76%	76%
South Africa	78%	77%	69%	79%	71%
South Korea	68%	77%		84%	57%
Spain	77%	82%	70%	82%	63%
Taiwan	80%	80%	84%	78%	87%
Thailand	93%	91%	95%	88%	93%
UK	73%	82%		82%	
United Arab Emirates	82%	85%	73%	75%	74%
US	76%	82%	73%	84%	82%
Vietnam	97%	94%	90%	92%	93%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Satisfaction By Country and Industry (Part 4)

KEY TAKEAWAYS

+ Indian consumers are most satisfied with their recent experiences with colleges/universities, government agencies, health insurers, and hospital/medical clinics.

+ South African consumers provided the lowest satisfaction rate across all countries and industries to government agencies (27%).

+ Colleges and universities received their lowest satisfaction scores from Dutch consumers.

ABOUT

This table shows the percentage of respondents from each country who gave each industry a 4- or 5-star satisfaction rating. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are satisfied with their most recent experience

■ Highest Rating
■ Lowest Rating

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	79%	49%	46%	55%	64%
Australia	86%	72%	60%	81%	79%
Belgium	75%	62%	44%	73%	75%
Brazil	81%	53%	62%	65%	70%
Canada	67%	54%	70%	73%	75%
China	83%	82%	90%	89%	81%
Colombia	84%	52%	66%	66%	59%
France			68%	75%	79%
Germany		44%	55%	70%	70%
Hong Kong	85%	58%	74%	74%	63%
India	94%	88%	83%	93%	90%
Indonesia	89%	71%	87%	91%	88%
Italy	73%	44%	51%	72%	67%
Japan			38%	60%	59%
Malaysia	78%	52%	70%	83%	77%
Mexico	87%	53%	69%	81%	69%
Netherlands	56%	58%	66%	71%	83%
New Zealand	74%	62%	71%	82%	73%
Philippines	79%	61%	68%	85%	84%
Singapore	79%	75%	78%	80%	77%
South Africa	71%	27%	53%	66%	55%
South Korea		49%	66%	55%	72%
Spain	74%	58%	50%	63%	75%
Taiwan	79%	56%	67%	86%	74%
Thailand	89%	68%	77%	92%	80%
UK	70%	61%	48%		78%
United Arab Emirates	79%	88%	76%	79%	84%
US	78%	61%	69%	78%	80%
Vietnam	89%	87%	80%	93%	78%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Advocacy Levels by Country

KEY TAKEAWAYS

+ Across all 29 countries, consumers are likely to recommend organizations they recently interacted with at a rate of 72%.

+ Consumers from the Philippines have the highest propensity to recommend organizations to their friends and family (84%), followed by the United Arab Emirates (83%), and India (82%).

+ Consumers from Japan are least likely to recommend organizations to their peers, at just 36%. South Korean consumers have the next lowest propensity to recommend, at 60%.

ABOUT

This chart shows how likely consumers from each surveyed country are to recommend the organizations that they recently interacted with, across all industries.

How likely are you to RECOMMEND these organizations to your friends and family?
(Percentage selecting 'somewhat' or 'extremely likely')
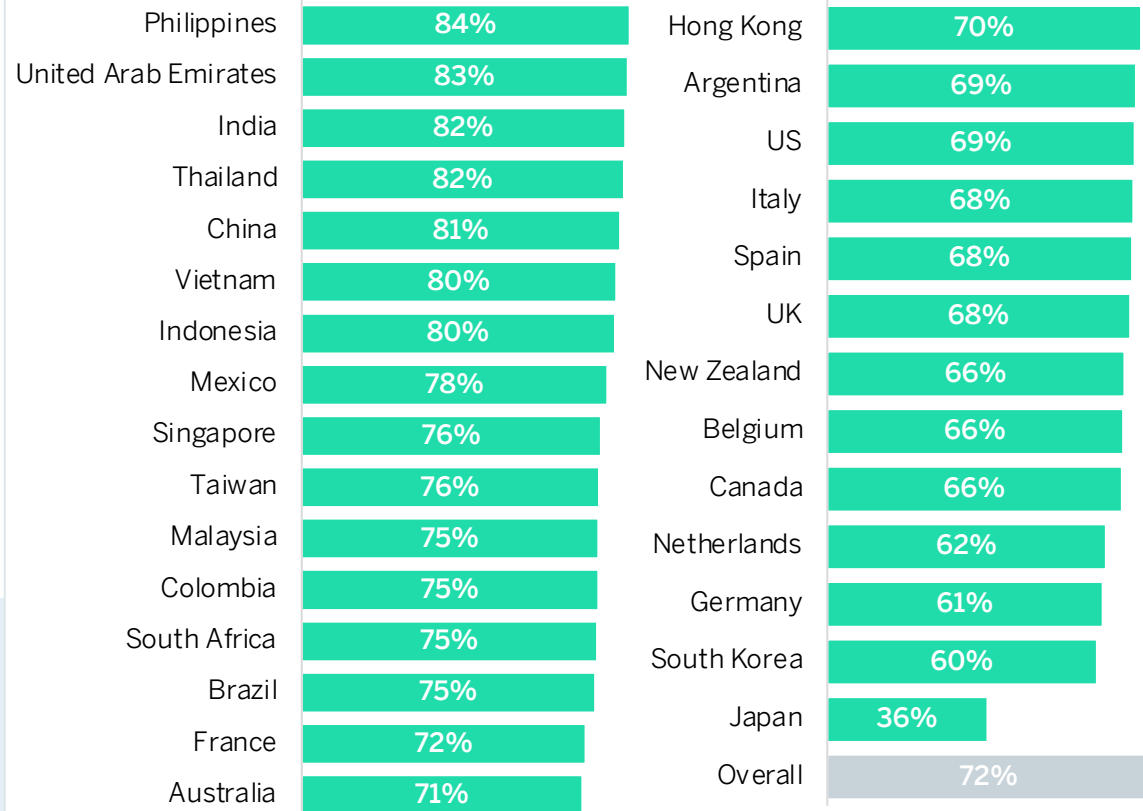
Country	%		Country	%
Philippines	84%		Hong Kong	70%
United Arab Emirates	83%		Argentina	69%
India	82%		US	69%
Thailand	82%		Italy	68%
China	81%		Spain	68%
Vietnam	80%		UK	68%
Indonesia	80%		New Zealand	66%
Mexico	78%		Belgium	66%
Singapore	76%		Canada	66%
Taiwan	76%		Netherlands	62%
Malaysia	75%		Germany	61%
Colombia	75%		South Korea	60%
South Africa	75%		Japan	36%
Brazil	75%		Overall	72%
France	72%			
Australia	71%			

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Advocacy Level YoY Change by Country

KEY TAKEAWAYS

+ Across all countries, consumers' likelihood to recommend has not changed much, with just a 0.1 percentage-point increase from the previous year.

+ Belgian consumers' likelihood to recommend has increased the most from last year, at a 4.7 %-point increase.

+ Japanese consumers' propensity to recommend has declined the most; they reported a likelihood that was 3.6 %-points lower than in the previous year. Vietnamese consumers' advocacy also declined similarly, at -3.3 %-pts.

ABOUT

This chart shows the year-over-year change in consumers' likelihood to recommend ('somewhat' or 'extremely likely') in each country, across all industries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Advocacy
(Percentage-point change from 2022 consumer advocacy levels to 2023)

Country	Change		Country	Change
Belgium	+4.7		Malaysia	+0.1
Spain	+4.2		Germany	-0.1
Thailand	+4.0		China	-0.3
Australia	+3.8		Netherlands	-0.4
Singapore	+3.6		Mexico	-0.9
France	+2.9		New Zealand	-0.9
Philippines	+2.9		South Korea	-1.1
Brazil	+1.8		Hong Kong	-1.3
Indonesia	+1.7		US	-1.3
Italy	+1.7		Vietnam	-3.3
UK	+1.4		Japan	-3.6
Canada	+0.7		Overall	+0.1
India	+0.6			

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
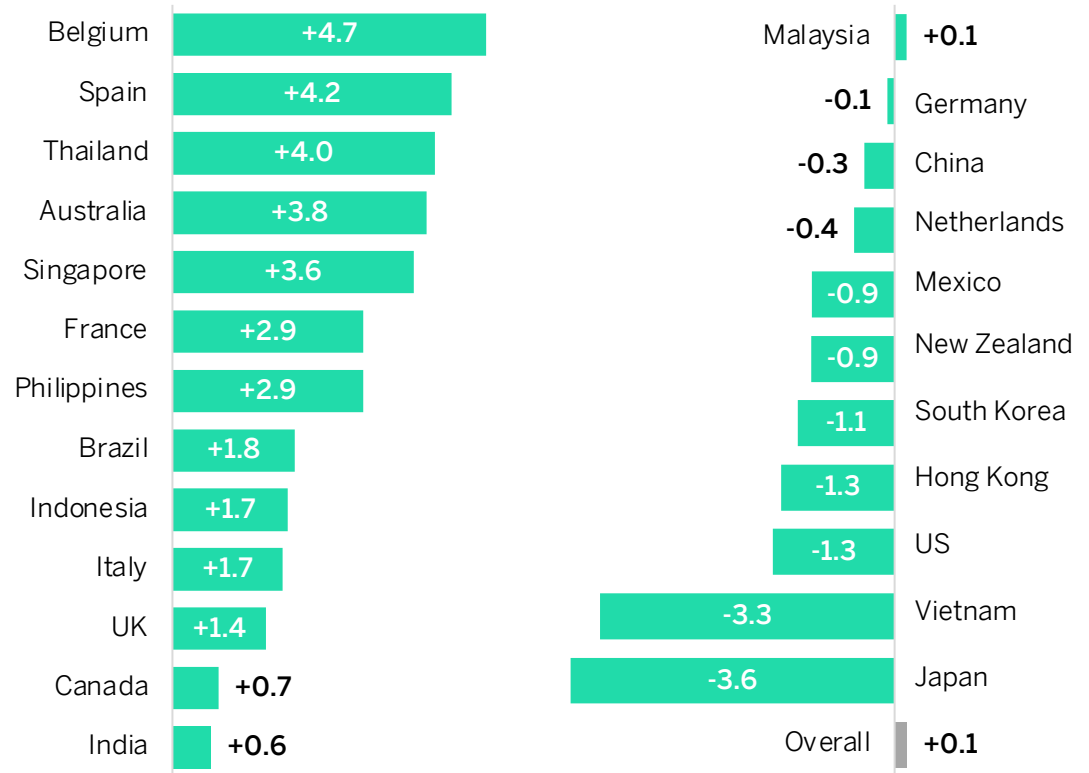
Consumer Advocacy Level by Industry

KEY TAKEAWAYS

+ Colleges and universities enjoy the highest rates of consumers extremely likely to recommend, at 44%. Electronics makers and airlines follow, at 41%.

+ Consumers are not likely to recommend government agencies and public utilities at the highest rates; 16% and 13%, respectively. Streaming and department stores enjoy the lowest rates of consumers unlikely to recommend, at 5%.
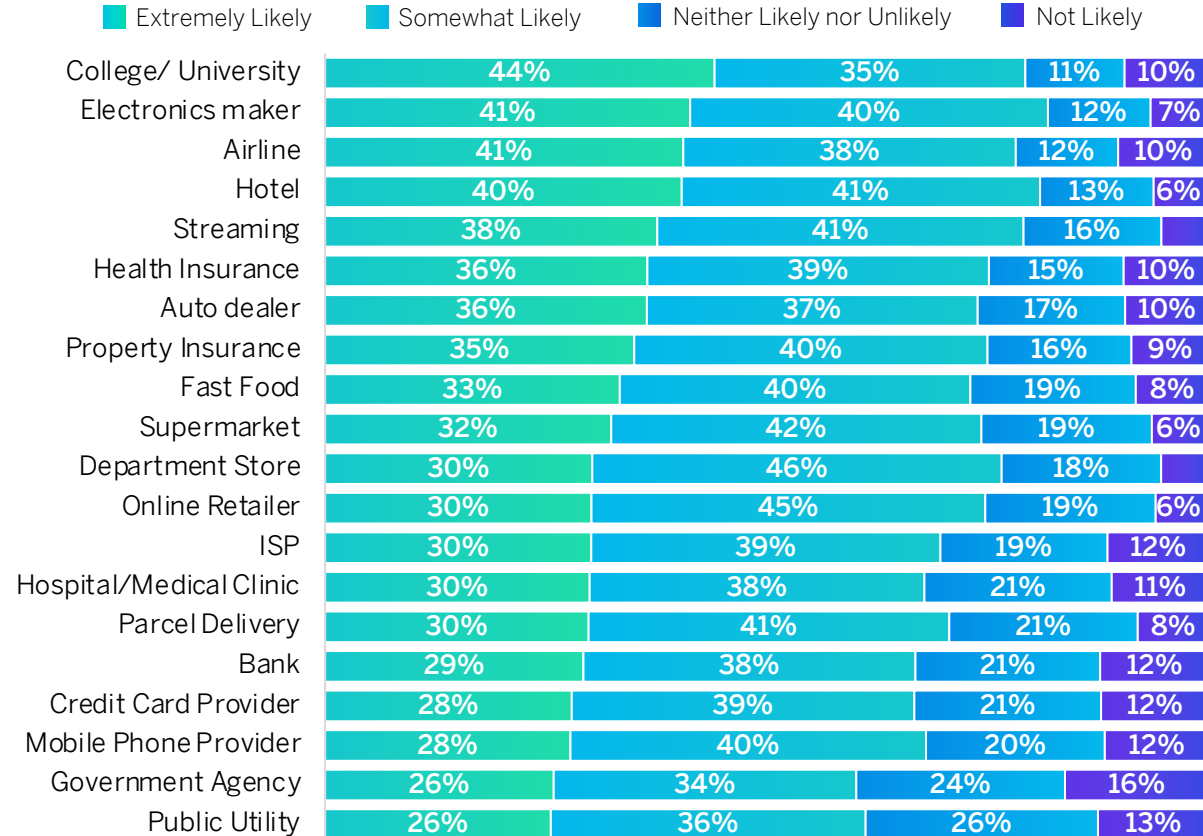
ABOUT

This chart shows how likely consumers across all countries are to recommend the organizations they recently interacted with from each industry.

How likely are you to RECOMMEND these organizations to your friends and family?

Legend: ■ Extremely Likely ■ Somewhat Likely ■ Neither Likely nor Unlikely ■ Not Likely

Industry	Extremely Likely	Somewhat Likely	Neither Likely nor Unlikely	Not Likely
College/ University	44%	35%	11%	10%
Electronics maker	41%	40%	12%	7%
Airline	41%	38%	12%	10%
Hotel	40%	41%	13%	6%
Streaming	38%	41%	16%	
Health Insurance	36%	39%	15%	10%
Auto dealer	36%	37%	17%	10%
Property Insurance	35%	40%	16%	9%
Fast Food	33%	40%	19%	8%
Supermarket	32%	42%	19%	6%
Department Store	30%	46%	18%	
Online Retailer	30%	45%	19%	6%
ISP	30%	39%	19%	12%
Hospital/Medical Clinic	30%	38%	21%	11%
Parcel Delivery	30%	41%	21%	8%
Bank	29%	38%	21%	12%
Credit Card Provider	28%	39%	21%	12%
Mobile Phone Provider	28%	40%	20%	12%
Government Agency	26%	34%	24%	16%
Public Utility	26%	36%	26%	13%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Advocacy Level YoY Change by Industry

KEY TAKEAWAYS

+ Consumers' propensity to recommend has increased most for colleges and universities (+5 percentage-points), followed by airlines (+3.2 %-points) and internet service providers (+3 %-points).

+ Property insurers experienced the greatest decline in consumers' advocacy, at -2.3 %-points. Department stores received the next largest decline (-1.6 %-points).

ABOUT

This chart shows the year-over-year change in consumers' likelihood to recommend ('somewhat' or 'extremely likely') for each industry, across all countries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Advocacy
(Percentage-point change from 2022 consumer advocacy levels to 2023)

Industry	Change
College/ University	+5.0
Airline	+3.2
ISP	+3.0
Bank	+2.1
Mobile Phone Provider	+0.7
Government Agency	+0.2
Credit Card Provider	+0.1
Health Insurance	-0.0
Streaming	-0.8
Online Retailer	-0.8
Supermarket	-1.0
Hospital/Medical Clinic	-1.1
Public Utility	-1.2
Fast Food	-1.2
Parcel Delivery	-1.3
Department Store	-1.6
Property Insurance	-2.3

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
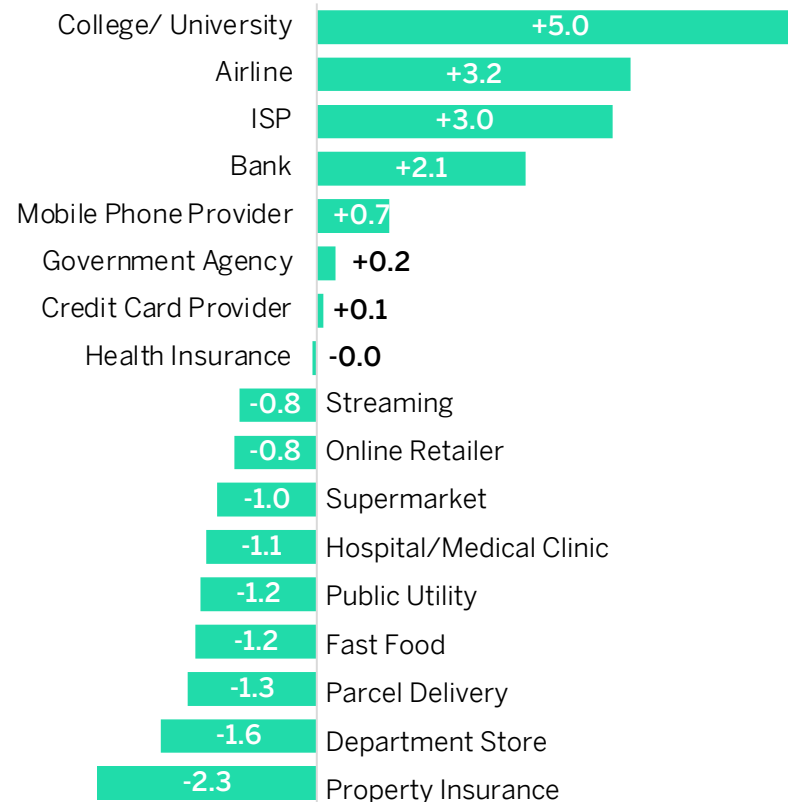
Consumer Advocacy By Country and Industry (Part 1)

KEY TAKEAWAYS

+ Japanese consumers were least likely to recommend the four industries listed for which we have data; Belgian consumers were least likely to recommend their electronics makers, at 63%.

+ Filipino consumers have the highest propensity to recommend department stores and fast food restaurants (88%), as well as supermarkets (90%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to recommend each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to recommend after their most recent experience

Highest Rating (teal)
Lowest Rating (purple)

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	81%	77%	76%	75%	76%
Australia	76%	72%	75%		74%
Belgium	75%	68%	74%	63%	75%
Brazil	81%	82%	80%	75%	81%
Canada	71%	71%	76%		79%
China	79%	71%	76%	89%	67%
Colombia	83%	84%	81%	79%	85%
France	76%	74%	82%		81%
Germany	69%	62%	75%	68%	72%
Hong Kong	71%	64%	64%	75%	67%
India	85%	85%	75%	79%	80%
Indonesia	79%	78%	79%	86%	71%
Italy	80%	65%	85%	77%	83%
Japan	43%	31%	37%		32%
Malaysia	78%	81%	76%	89%	79%
Mexico	84%	78%	76%	87%	85%
Netherlands	73%	61%	69%	68%	72%
New Zealand	72%	67%	78%		67%
Philippines	88%	88%	78%	87%	90%
Singapore	71%	72%	77%	82%	81%
South Africa	79%	84%	77%	80%	81%
South Korea	65%	60%	61%	64%	59%
Spain	78%	73%	80%		79%
Taiwan	77%	73%	72%	84%	79%
Thailand	77%	84%	79%	91%	77%
UK	74%	71%	78%		77%
UAE	87%	83%	82%	86%	84%
US	74%	67%	75%		78%
Vietnam	76%	82%	81%	84%	80%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Advocacy By Country and Industry (Part 2)

KEY TAKEAWAYS

+ Indian consumers have the highest propensity to recommend banks and mobile phone providers after their most recent experiences.

+ Internet service providers' greatest advocates are Emiratis (86%), and credit card providers' are Chinese (84%).

+ Japanese consumers are least likely to recommend across all five industries listed.

Consumers who are likely to recommend after their most recent experience

Highest Rating
Lowest Rating

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	58%	57%	64%	60%	80%
Australia	66%	70%	67%	69%	80%
Belgium	63%	55%	60%	64%	73%
Brazil	72%	70%	61%	72%	86%
Canada	67%	63%	65%	64%	74%
China	80%	84%	78%	85%	79%
Colombia	69%	66%	64%	68%	82%
France	68%	60%	69%	70%	84%
Germany	57%	60%	60%	63%	74%
Hong Kong	70%	65%	64%	68%	72%
India	89%	83%	83%	84%	80%
Indonesia	76%	78%	75%	80%	84%
Italy	58%	67%	65%	63%	83%
Japan	24%	28%	30%	21%	53%
Malaysia	65%	64%	74%	74%	77%
Mexico	78%	72%	76%	77%	80%
Netherlands	58%	61%	64%	59%	69%
New Zealand	65%	54%	68%	61%	77%
Philippines	84%	79%	80%	72%	86%
Singapore	70%	72%	73%	78%	78%
South Africa	78%	66%	77%	81%	83%
South Korea	60%	54%	55%	55%	68%
Spain	50%	58%	65%	68%	80%
Taiwan	75%	69%	74%	74%	77%
Thailand	78%	81%	75%	75%	94%
UK	67%	65%	73%	62%	80%
UAE	87%	78%	81%	86%	83%
US	73%	66%	71%	63%	79%
Vietnam	83%	78%	78%	79%	80%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to recommend each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Advocacy By Country and Industry (Part 3)

KEY TAKEAWAYS

+ Chinese consumers are most likely to recommend airlines (90%), while the Thai are most likely to recommend auto dealers (93%) and property insurers (93%).

+ All five industries listed experience the lowest propensity to recommend by Japanese consumers.

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to recommend each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to recommend after their most recent experience

Highest Rating
Lowest Rating

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	78%	83%	57%	75%	
Australia	78%	81%	69%	68%	75%
Belgium	71%	77%	65%	73%	
Brazil	82%	82%	73%	86%	63%
Canada	60%	74%	60%	63%	65%
China	90%	89%	83%	80%	87%
Colombia	79%	87%	72%	81%	
France	73%	83%	70%	75%	61%
Germany	59%	72%	60%	60%	52%
Hong Kong	82%	80%		69%	75%
India	86%	89%	84%	70%	84%
Indonesia	89%	84%	81%	80%	88%
Italy	69%	79%	65%	77%	61%
Japan	51%	52%	35%	37%	35%
Malaysia	76%	88%	75%	74%	74%
Mexico	84%	86%	78%	83%	81%
Netherlands	61%	69%	60%	53%	
New Zealand	77%	67%	65%	66%	58%
Philippines	90%	86%	84%	86%	82%
Singapore	83%	82%	85%	62%	78%
South Africa	78%	82%	79%	79%	74%
South Korea	75%	73%		62%	47%
Spain	77%	81%	65%	72%	58%
Taiwan	88%	83%	83%	71%	80%
Thailand	88%	82%	93%	80%	93%
UK	71%	74%		64%	
UAE	85%	89%	80%	79%	74%
US	70%	78%	66%	70%	63%
Vietnam	86%	87%	82%	71%	88%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Advocacy By Country and Industry (Part 4)

KEY TAKEAWAYS

+ Government agencies experience the least propensity to recommend from South Africans and the greatest from Vietnamese.

+ The Thai are most likely to recommend colleges and universities (86%) and health insurers (89%), while Filipinos are most likely to be advocates for hospitals and medical clinics (88%).

+ Canadian consumers are least likely to recommend colleges and universities (62%), followed by Dutch consumers (67%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to recommend each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to recommend after their most recent experience

■ Highest Rating
■ Lowest Rating

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	82%	43%	50%	63%	71%
Australia	82%	59%	51%	73%	71%
Belgium	70%	48%	42%	70%	67%
Brazil	81%	52%	70%	68%	77%
Canada	62%	48%	59%	59%	67%
China	81%	82%	84%	83%	75%
Colombia	83%	57%	71%	74%	67%
France			62%	66%	75%
Germany		40%	48%	58%	55%
Hong Kong	74%	60%	67%	79%	66%
India	81%	77%	84%	86%	80%
Indonesia	84%	63%	75%	86%	79%
Italy	70%	43%	55%	57%	63%
Japan			18%	41%	38%
Malaysia	76%	61%	69%	83%	79%
Mexico	78%	54%	71%	78%	69%
Netherlands	67%	42%	48%	61%	67%
New Zealand	75%	46%	63%	69%	65%
Philippines	85%	74%	77%	86%	88%
Singapore	83%	75%	76%	76%	68%
South Africa	80%	32%	64%	73%	74%
South Korea		48%	56%	55%	65%
Spain	71%	58%	55%	60%	66%
Taiwan	76%	54%	69%	83%	71%
Thailand	86%	67%	73%	89%	78%
UK	74%	46%	39%		65%
UAE	80%	85%	81%	82%	86%
US	68%	50%	58%	66%	68%
Vietnam	83%	88%	61%	87%	69%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Trust Level by Country

KEY TAKEAWAYS

+ Across all countries and industries, consumers report that they are likely to trust an organization they have recently interacted with at a rate of 74%.

+ Filipino consumers are most likely to trust the organizations they have recently interacted with (83%), followed by Chinese (83%) and Indian consumers (82%).

+ Japanese consumers are least likely to trust, at 60%, followed by Germans (64%) and South Koreans (65%).

ABOUT

This chart shows how likely consumers from each surveyed country are to trust the organizations that they recently interacted with, across all industries.

How likely are you to TRUST these organizations?
(Percentage selecting 'somewhat' or 'extremely likely')

Country	%		Country	%
Philippines	83%		Colombia	73%
China	83%		New Zealand	72%
India	82%		UK	72%
Taiwan	82%		Spain	70%
Thailand	82%		US	70%
United Arab Emirates	82%		Canada	70%
Vietnam	81%		Netherlands	70%
Indonesia	79%		Belgium	69%
Hong Kong	79%		Argentina	68%
Singapore	78%		Italy	66%
Mexico	77%		South Korea	65%
France	76%		Germany	64%
Australia	75%		Japan	60%
Malaysia	74%		Overall	74%
South Africa	73%			
Brazil	73%			

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
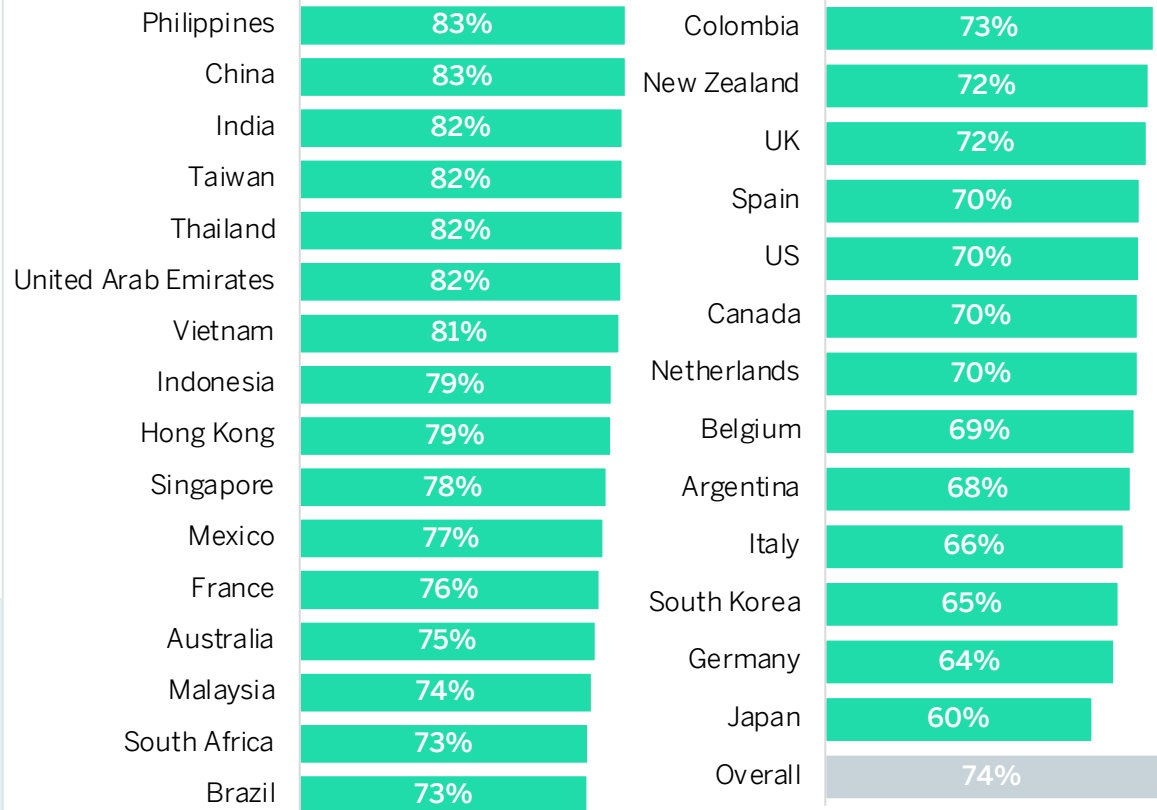
Consumer Trust Level YoY Change by Country

KEY TAKEAWAYS

+ Across all countries, consumers' likelihood to trust increased from last year's levels by 0.8 percentage-points.

+ Spanish consumers' propensity to trust has increased the most from the previous year, at +5.8 %-pts, followed by Belgian consumers' trust, at +4.9 %-pts.

+ Malaysian consumers' trust decreased the most, at -3.5 %-pts compared to last year, followed by Vietnamese (-3.4 %-pts) and South Korean (-3.3 %-pts) trust levels.

ABOUT

This chart shows the year-over-year change in consumers' likelihood to trust ('somewhat' or 'extremely likely') in each country, across all industries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Trust
(Percentage-point change from 2022 consumer trust levels to 2023)

Country	Change
Spain	+5.8
Belgium	+4.9
Hong Kong	+4.2
Australia	+4.1
Netherlands	+3.8
France	+3.5
Thailand	+3.5
UK	+3.1
Italy	+2.9
Philippines	+2.5
Indonesia	+2.5
Singapore	+1.7
Germany	+1.5
India	+0.7
New Zealand	+0.3
Japan	+0.3
Mexico	-0.2
Brazil	-0.3
Canada	-0.4
China	-0.7
US	-2.9
South Korea	-3.3
Vietnam	-3.4
Malaysia	-3.5
Overall	+0.8

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
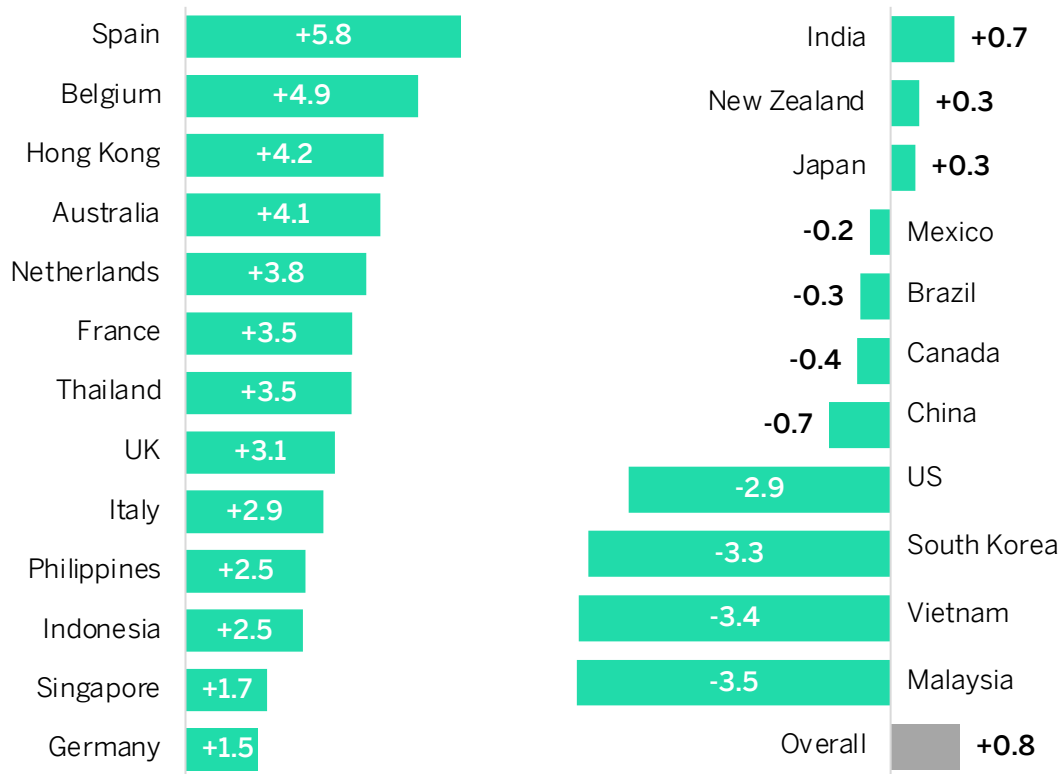
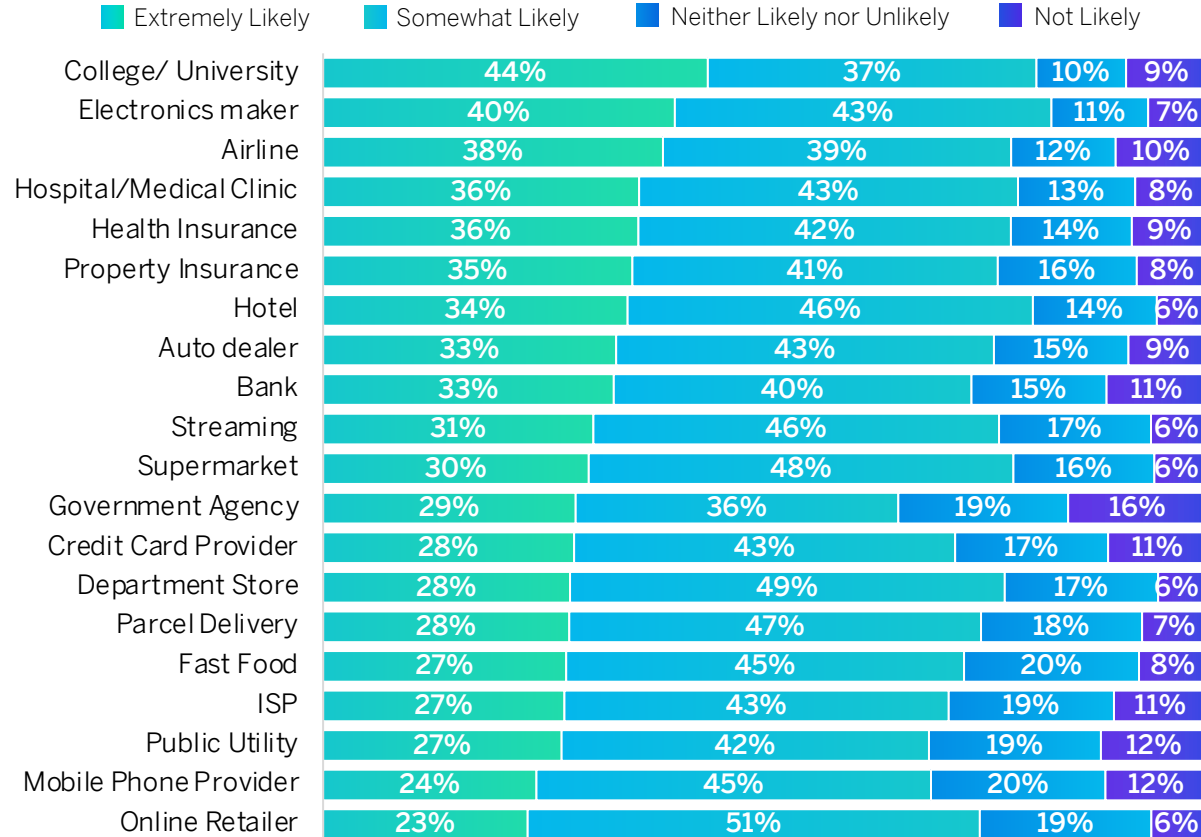# Consumer Trust Level by Industry

KEY TAKEAWAYS

+ Colleges and universities enjoy the highest rate of high consumer trust, followed by electronics makers and airlines.

+ Consumers are not likely to trust government agencies (16%), public utilities (12%), and mobile phone providers (12%) at the highest rates.

+ While online retailers have the fewest percentage of consumers that are 'extremely likely' to trust them (23%), government agencies induce the lowest rate of consumers either 'somewhat' or 'extremely likely' to trust (65%).

ABOUT

This chart shows how likely consumers across all countries are to trust the organizations they recently interacted with from each industry.

How likely are you to TRUST these organizations?

■ Extremely Likely   ■ Somewhat Likely   ■ Neither Likely nor Unlikely   ■ Not Likely

Organization	Extremely Likely	Somewhat Likely	Neither Likely nor Unlikely	Not Likely
College/ University	44%	37%	10%	9%
Electronics maker	40%	43%	11%	7%
Airline	38%	39%	12%	10%
Hospital/Medical Clinic	36%	43%	13%	8%
Health Insurance	36%	42%	14%	9%
Property Insurance	35%	41%	16%	8%
Hotel	34%	46%	14%	6%
Auto dealer	33%	43%	15%	9%
Bank	33%	40%	15%	11%
Streaming	31%	46%	17%	6%
Supermarket	30%	48%	16%	6%
Government Agency	29%	36%	19%	16%
Credit Card Provider	28%	43%	17%	11%
Department Store	28%	49%	17%	6%
Parcel Delivery	28%	47%	18%	7%
Fast Food	27%	45%	20%	8%
ISP	27%	43%	19%	11%
Public Utility	27%	42%	19%	12%
Mobile Phone Provider	24%	45%	20%	12%
Online Retailer	23%	51%	19%	6%

Base: 33,093 consumers across 29 countries
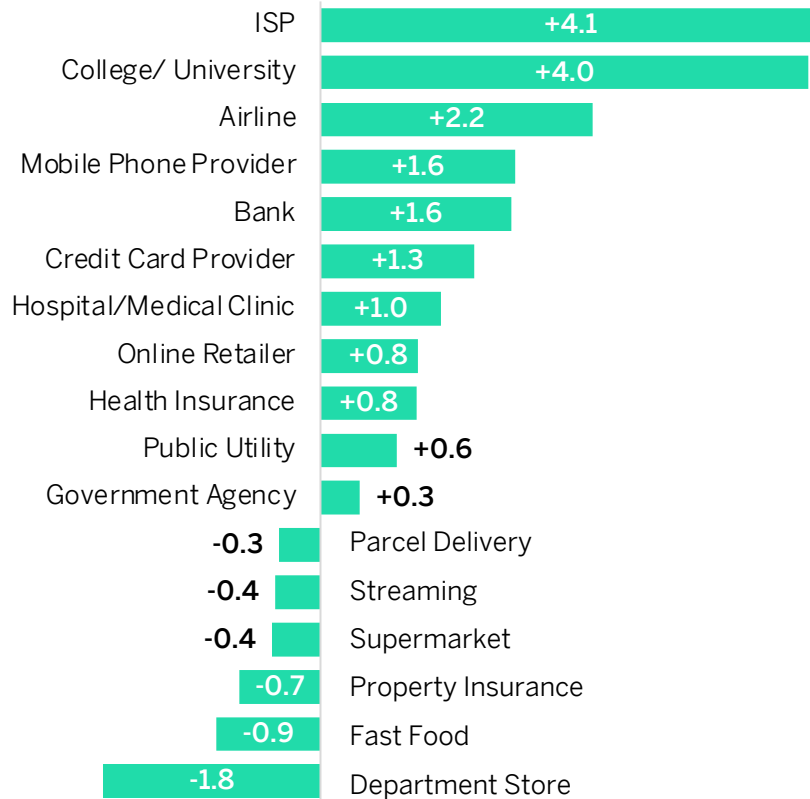Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Trust Level YoY Change by Industry

KEY TAKEAWAYS

+ Consumer trust in internet service providers increased the most, at 4.1 percentage-points higher than the previous year. Colleges and universities enjoyed the second-highest increase in consumer trust, at 4 %-pts.

+ Consumer trust fell the most for department stores (-1.8 %-pts) and fast food restaurants (-0.9%-pts).

ABOUT

This chart shows the year-over-year change in consumers' likelihood to trust ('somewhat' or 'extremely likely') for each industry, across all countries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Trust
(Percentage-point change from 2022 consumer trust levels to 2023)

Industry	Change
ISP	+4.1
College/ University	+4.0
Airline	+2.2
Mobile Phone Provider	+1.6
Bank	+1.6
Credit Card Provider	+1.3
Hospital/Medical Clinic	+1.0
Online Retailer	+0.8
Health Insurance	+0.8
Public Utility	+0.6
Government Agency	+0.3
Parcel Delivery	-0.3
Streaming	-0.4
Supermarket	-0.4
Property Insurance	-0.7
Fast Food	-0.9
Department Store	-1.8

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Trust By Country and Industry (Part 1)

KEY TAKEAWAYS

+ Japanese consumers are least likely to trust after their experiences with all four of the industries in this figure for which we have data. Belgian consumers are least likely to trust electronics makers (60%).

+ Filipino consumers are most likely to trust department stores, fast food restaurants, and supermarkets, while the French are most likely to trust online retailers (82%). Chinese consumers are most likely to trust electronics makers (91%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to trust each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to trust after their most recent experience

■ Highest Rating
■ Lowest Rating

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	77%	76%	69%	77%	73%
Australia	75%	73%	74%		81%
Belgium	79%	65%	75%	60%	81%
Brazil	80%	76%	81%	69%	78%
Canada	73%	70%	77%		81%
China	78%	78%	74%	91%	77%
Colombia	79%	75%	65%	76%	80%
France	77%	73%	82%		86%
Germany	70%	62%	73%	71%	72%
Hong Kong	75%	69%	73%	86%	78%
India	81%	85%	74%	79%	79%
Indonesia	79%	73%	72%	88%	75%
Italy	76%	63%	81%	77%	79%
Japan	64%	49%	56%		60%
Malaysia	78%	79%	68%	89%	76%
Mexico	83%	77%	75%	88%	82%
Netherlands	79%	63%	75%	68%	77%
New Zealand	79%	68%	78%		73%
Philippines	86%	87%	71%	86%	89%
Singapore	72%	72%	72%	85%	81%
South Africa	78%	80%	76%	81%	84%
South Korea	69%	56%	65%	67%	69%
Spain	77%	72%	77%		81%
Taiwan	83%	78%	77%	88%	86%
Thailand	78%	79%	71%	90%	80%
UK	75%	70%	79%		79%
UAE	83%	82%	79%	86%	83%
US	69%	66%	76%		79%
Vietnam	70%	76%	80%	84%	85%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Trust By Country and Industry (Part 2)

Qualtrics **XM** institute™

KEY TAKEAWAYS

+ Spanish consumers are least likely to trust banks and credit card providers after their most recent experience, at 50% and 58%, respectively. Japanese are least likely to trust mobile phone providers, internet service providers, and streaming media services.

+ Chinese consumers have the highest propensity to trust credit card providers (86%) and internet service providers (84%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to trust each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to trust after their most recent experience

▮ Highest Rating
▮ Lowest Rating

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	62%	62%	64%	56%	77%
Australia	73%	77%	71%	71%	76%
Belgium	70%	61%	64%	66%	74%
Brazil	71%	68%	61%	71%	82%
Canada	77%	68%	64%	70%	71%
China	89%	86%	79%	84%	84%
Colombia	71%	65%	67%	68%	78%
France	77%	66%	65%	70%	83%
Germany	68%	68%	58%	61%	70%
Hong Kong	86%	77%	75%	81%	74%
India	89%	83%	82%	83%	80%
Indonesia	80%	80%	77%	77%	80%
Italy	52%	63%	58%	60%	78%
Japan	58%	63%	52%	46%	62%
Malaysia	67%	69%	69%	71%	74%
Mexico	73%	69%	74%	74%	84%
Netherlands	69%	73%	70%	69%	67%
New Zealand	75%	64%	72%	74%	66%
Philippines	87%	80%	84%	72%	80%
Singapore	84%	78%	73%	76%	71%
South Africa	80%	68%	72%	78%	74%
South Korea	75%	63%	57%	61%	66%
Spain	50%	58%	63%	71%	84%
Taiwan	86%	81%	80%	77%	79%
Thailand	83%	83%	74%	75%	92%
UK	76%	70%	77%	66%	75%
UAE	84%	77%	77%	81%	81%
US	73%	69%	66%	65%	73%
Vietnam	85%	84%	75%	82%	79%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Trust By Country and Industry (Part 3)

KEY TAKEAWAYS

+ Chinese consumers are most likely to trust airlines (91%) and hotels (89%), while Germans are least likely to trust airlines (57%), and the Japanese least likely to do so with hotels (64%).

+ Argentinians are least likely to trust auto dealers (53%), and South Koreans least likely to trust property insurers (52%).

+ Thai consumers have the highest propensity to trust auto dealers and property insurers.

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to trust each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to trust after their most recent experience

■ Highest Rating
■ Lowest Rating

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	78%	80%	53%	73%	
Australia	79%	80%	67%	76%	78%
Belgium	67%	77%	69%	74%	
Brazil	78%	81%	76%	81%	66%
Canada	57%	72%	61%	76%	64%
China	91%	89%	85%	83%	82%
Colombia	79%	84%	70%	83%	
France	76%	86%	81%	79%	64%
Germany	57%	76%	62%	66%	57%
Hong Kong	85%	78%		80%	81%
India	85%	84%	87%	75%	83%
Indonesia	89%	85%	79%	76%	84%
Italy	67%	74%	68%	72%	58%
Japan	66%	64%	65%	56%	57%
Malaysia	70%	81%	74%	74%	75%
Mexico	82%	85%	76%	79%	80%
Netherlands	64%	73%	69%	68%	
New Zealand	78%	72%	64%	73%	66%
Philippines	91%	87%	85%	84%	81%
Singapore	81%	82%	79%	64%	81%
South Africa	75%	82%	68%	79%	70%
South Korea	75%	69%		72%	52%
Spain	74%	78%	68%	76%	61%
Taiwan	88%	79%	86%	81%	87%
Thailand	85%	81%	93%	78%	92%
UK	71%	81%		68%	
UAE	84%	85%	81%	76%	75%
US	71%	78%	64%	76%	66%
Vietnam	89%	87%	82%	76%	87%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Trust By Country and Industry (Part 4)

KEY TAKEAWAYS

+ Colleges and universities garner the least trust from Canadian consumers (65%), while public utilities do so with UK consumers (44%).

+ Italians are least likely to trust hospitals and medical clinics (68%), while Filipino consumers are most likely to do so (88%).

+ South African consumers are least likely to trust government agencies (33%), while the Vietnamese are most likely to do so (87%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to trust each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to trust after their most recent experience

🟩 Highest Rating
🟪 Lowest Rating

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	79%	45%	54%	67%	75%
Australia	83%	72%	65%	78%	81%
Belgium	71%	56%	49%	73%	78%
Brazil	81%	50%	71%	69%	75%
Canada	65%	55%	75%	68%	79%
China	81%	86%	86%	84%	74%
Colombia	82%	58%	71%	70%	70%
France		73%	75%		83%
Germany		38%	56%	67%	71%
Hong Kong	83%	70%	85%	81%	87%
India	84%	78%	85%	86%	80%
Indonesia	86%	65%	78%	86%	78%
Italy	72%	47%	55%	64%	68%
Japan		53%		65%	75%
Malaysia	79%	61%	74%	76%	81%
Mexico	79%	59%	73%	80%	71%
Netherlands	65%	59%	62%	68%	84%
New Zealand	78%	60%	73%	73%	84%
Philippines	85%	71%	79%	86%	88%
Singapore	84%	83%	82%	78%	86%
South Africa	82%	33%	66%	71%	71%
South Korea		53%	71%	60%	79%
Spain	70%	64%	59%	73%	78%
Taiwan	84%	68%	83%	87%	85%
Thailand	86%	69%	80%	89%	84%
UK	78%	54%	44%		83%
UAE	84%	86%	84%	84%	84%
US	73%	52%	65%	70%	79%
Vietnam	83%	87%	72%	88%	78%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
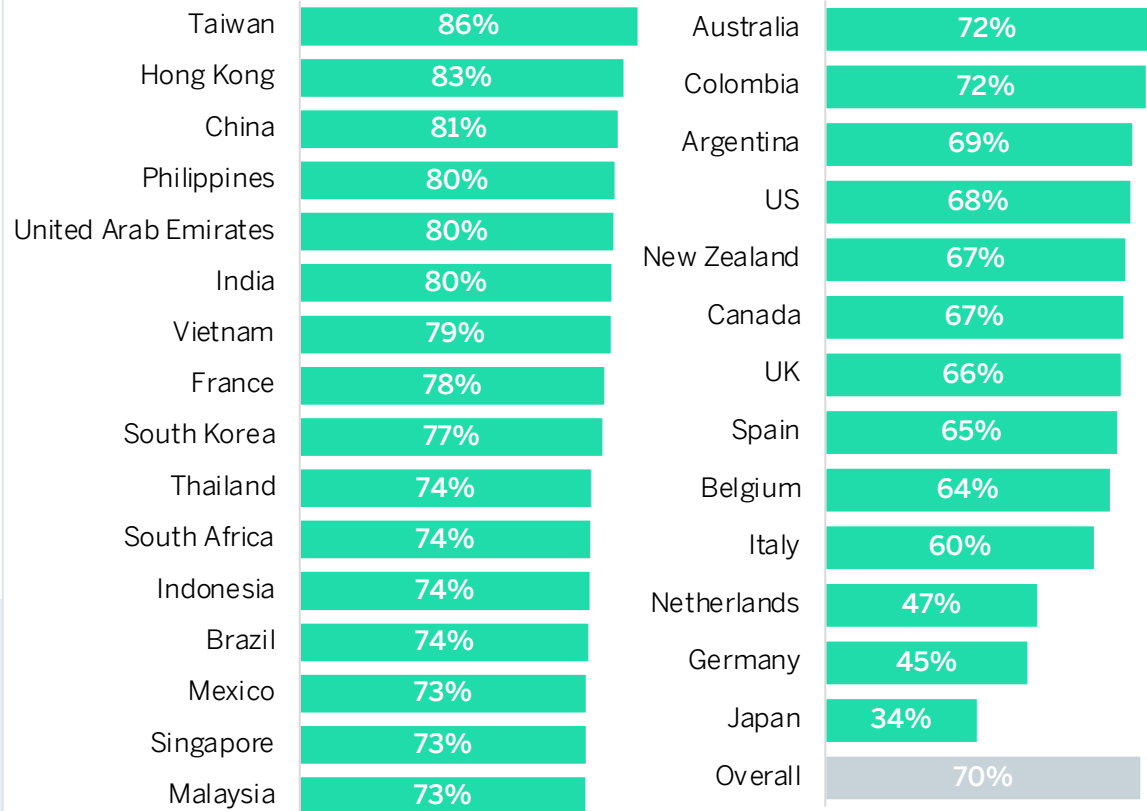
Consumer Rebuying Level by Country

KEY TAKEAWAYS

+ Across all countries and industries, consumers report that they are likely to purchase more from an organization they have recently interacted with at a rate of 70%.

+ Taiwanese consumers are the most likely to purchase more from the organizations they have recently interacted with (86%), followed by Hong Kong (83%), and China (81%).

+ Japanese consumers report the lowest likelihood to rebuy, at just 34%, followed by German consumers at 45%.

ABOUT

This chart shows how likely consumers from each surveyed country are to purchase more from the organizations that they recently interacted with, across all industries.

How likely are you to PURCHASE MORE from these organizations?
(Percentage selecting 'somewhat' or 'extremely likely')

Country	%		Country	%
Taiwan	86%		Australia	72%
Hong Kong	83%		Colombia	72%
China	81%		Argentina	69%
Philippines	80%		US	68%
United Arab Emirates	80%		New Zealand	67%
India	80%		Canada	67%
Vietnam	79%		UK	66%
France	78%		Spain	65%
South Korea	77%		Belgium	64%
Thailand	74%		Italy	60%
South Africa	74%		Netherlands	47%
Indonesia	74%		Germany	45%
Brazil	74%		Japan	34%
Mexico	73%		Overall	70%
Singapore	73%			
Malaysia	73%			

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

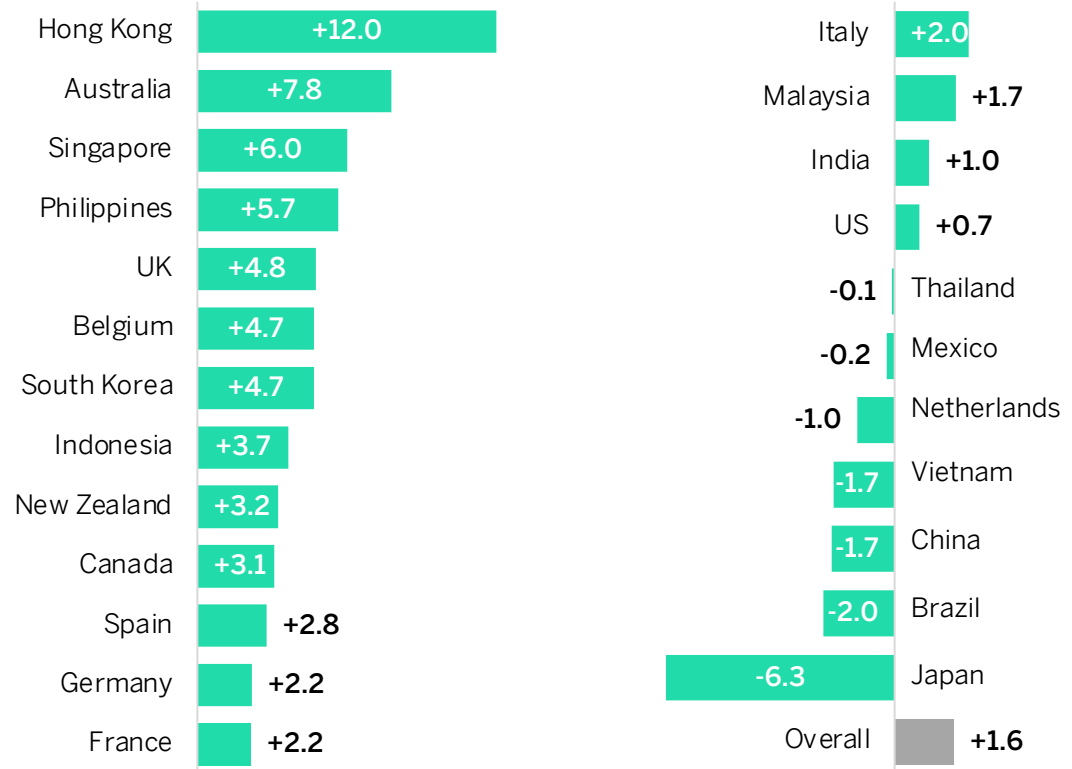# Consumer Rebuying Level YoY Change by Country

KEY TAKEAWAYS

+ Across all countries, consumers' likelihood to purchase more increased from last year's levels by 1.6 percentage-points.

+ Hong Kong consumers' likelihood to rebuy increased the most from the previous year, at 12 %-pts.

+ Japanese consumers' propensity to rebuy decreased by 6.3 %-pts, the greatest decline of all countries reporting.

ABOUT

This chart shows the year-over-year change in consumers' likelihood to purchase more ('somewhat' or 'extremely likely') in each country, across all industries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Likelihood to Rebuy
(Percentage-point change from 2022 consumer rebuy levels to 2023)

Country	Change
Hong Kong	+12.0
Australia	+7.8
Singapore	+6.0
Philippines	+5.7
UK	+4.8
Belgium	+4.7
South Korea	+4.7
Indonesia	+3.7
New Zealand	+3.2
Canada	+3.1
Spain	+2.8
Germany	+2.2
France	+2.2

Country	Change
Italy	+2.0
Malaysia	+1.7
India	+1.0
US	+0.7
Thailand	-0.1
Mexico	-0.2
Netherlands	-1.0
Vietnam	-1.7
China	-1.7
Brazil	-2.0
Japan	-6.3
Overall	+1.6

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study
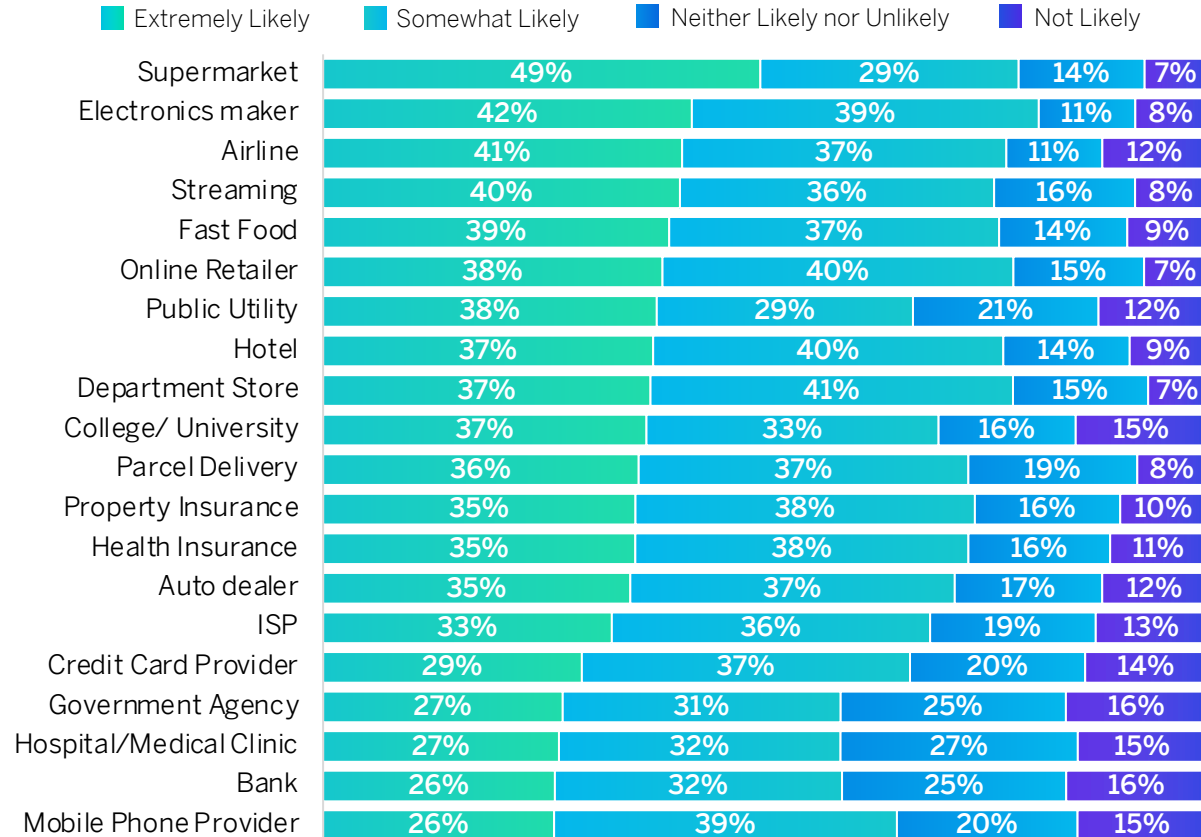
Consumer Rebuying Level by Industry

KEY TAKEAWAYS

+ Consumers are most likely to purchase more from supermarkets (49%), followed by electronics makers (42%) and airlines (41%).

+ Consumers are not likely to purchase more from government agencies and banks (16%) at the highest rates.

+ While mobile phone providers received the lowest rates of those 'extremely likely' to rebuy, government agencies, hospitals and medical clinics, and banks all have the lowest rates of those 'somewhat' or 'extremely likely' to rebuy (59%).

ABOUT

This chart shows how likely consumers across all countries are to purchase more from the organizations they recently interacted with from each industry.

How likely are you to PURCHASE MORE from these organizations?

Legend: ■ Extremely Likely ■ Somewhat Likely ■ Neither Likely nor Unlikely ■ Not Likely

Industry	Extremely Likely	Somewhat Likely	Neither Likely nor Unlikely	Not Likely
Supermarket	49%	29%	14%	7%
Electronics maker	42%	39%	11%	8%
Airline	41%	37%	11%	12%
Streaming	40%	36%	16%	8%
Fast Food	39%	37%	14%	9%
Online Retailer	38%	40%	15%	7%
Public Utility	38%	29%	21%	12%
Hotel	37%	40%	14%	9%
Department Store	37%	41%	15%	7%
College/ University	37%	33%	16%	15%
Parcel Delivery	36%	37%	19%	8%
Property Insurance	35%	38%	16%	10%
Health Insurance	35%	38%	16%	11%
Auto dealer	35%	37%	17%	12%
ISP	33%	36%	19%	13%
Credit Card Provider	29%	37%	20%	14%
Government Agency	27%	31%	25%	16%
Hospital/Medical Clinic	27%	32%	27%	15%
Bank	26%	32%	25%	16%
Mobile Phone Provider	26%	39%	20%	15%

Base: 33,093 consumers across 29 countries
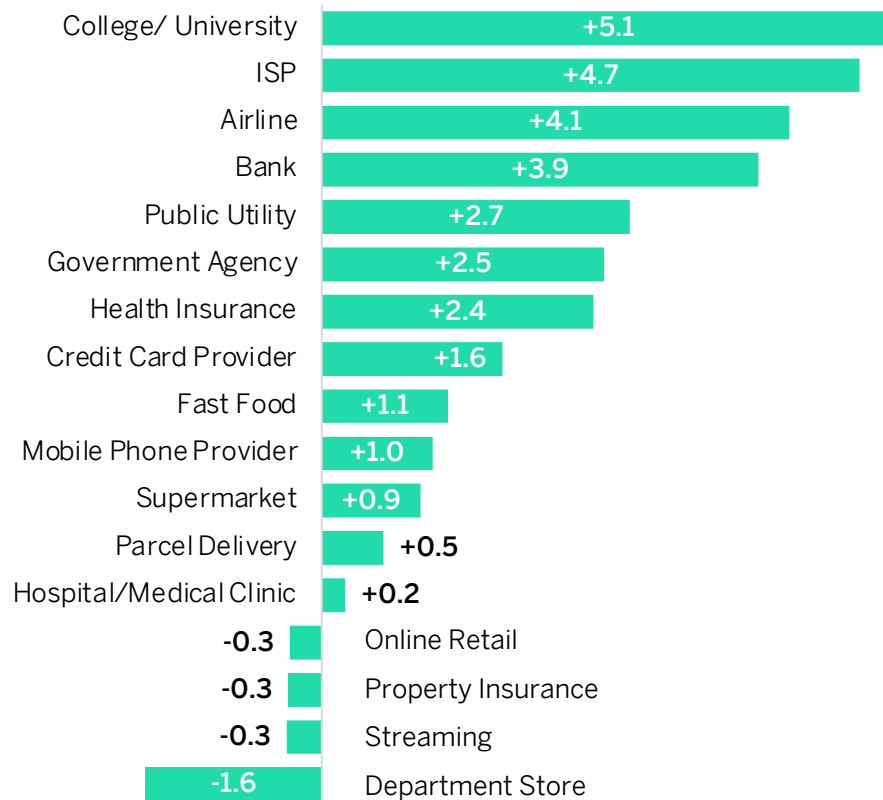Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Rebuying Level YoY Change by Industry

KEY TAKEAWAYS

+ Consumer likelihood to rebuy increased the most for colleges and universities (5.1 percentage-points) and internet service providers (4.7 %-pts).

+ Consumers' propensity to rebuy from department stores dropped the most, by 1.6 %-pts.

ABOUT

This chart shows the year-over-year change in consumers' likelihood to purchase more ('somewhat' or 'extremely likely') for each industry, across all countries. Data is only reported for the 24 countries and 17 industries for which we collected data in both 2021 and 2022.

Year-over-Year Change in Consumer Likelihood to Rebuy
(Percentage-point change from 2022 consumer rebuy levels to 2023)

Industry	Change
College/ University	+5.1
ISP	+4.7
Airline	+4.1
Bank	+3.9
Public Utility	+2.7
Government Agency	+2.5
Health Insurance	+2.4
Credit Card Provider	+1.6
Fast Food	+1.1
Mobile Phone Provider	+1.0
Supermarket	+0.9
Parcel Delivery	+0.5
Hospital/Medical Clinic	+0.2
Online Retail	-0.3
Property Insurance	-0.3
Streaming	-0.3
Department Store	-1.6

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Rebuying By Country and Industry (Part 1)

KEY TAKEAWAYS

+ Japanese consumers are least likely to rebuy from all four industries in this figure for which we have data.

+ Taiwanese consumers have the most propensity to purchase more from the fast food restaurants and electronics makers they have recently interacted with.

+ French consumers are most likely to rebuy from online retailers (91%) and supermarkets (95%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to purchase more from each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to rebuy after their most recent experience

Highest Rating
Lowest Rating

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	77%	80%	78%	73%	80%
Australia	82%	80%	83%		84%
Belgium	76%	71%	64%	66%	77%
Brazil	83%	79%	82%	70%	81%
Canada	81%	79%	87%		82%
China	81%	77%	75%	88%	73%
Colombia	78%	80%	74%	79%	83%
France	87%	87%	91%		95%
Germany	61%	55%	66%	58%	61%
Hong Kong	86%	86%	85%	83%	91%
India	83%	83%	75%	78%	75%
Indonesia	78%	73%	79%	89%	73%
Italy	76%	67%	83%	76%	78%
Japan	45%	36%	46%		42%
Malaysia	81%	83%	84%	86%	83%
Mexico	80%	77%	76%	82%	84%
Netherlands	56%	57%	62%	56%	59%
New Zealand	84%	81%	83%		84%
Philippines	88%	87%	81%	88%	92%
Singapore	77%	74%	87%	86%	87%
South Africa	82%	83%	79%	78%	86%
South Korea	77%	79%	87%	70%	88%
Spain	76%	74%	80%		78%
Taiwan	87%	88%	90%	91%	93%
Thailand	72%	76%	77%	90%	75%
UK	77%	78%	86%		85%
UAE	84%	82%	87%	81%	87%
US	74%	75%	81%		84%
Vietnam	78%	75%	84%	80%	82%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Rebuying By Country and Industry (Part 2)

KEY TAKEAWAYS

+ Japanese consumers are least likely to rebuy from all industries listed in this figure.

+ Taiwanese consumers say they are most likely to purchase more from the banks, internet service providers, and streaming services they have recently interacted with.

+ Credit card providers enjoy the highest rates of consumers likely to rebuy in China (84%), while mobile phone providers do so with their Indian consumers (81%).

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to purchase more from each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to rebuy after their most recent experience

■ Highest Rating
■ Lowest Rating

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	54%	62%	63%	63%	77%
Australia	60%	67%	67%	65%	72%
Belgium	58%	58%	61%	63%	76%
Brazil	67%	73%	66%	74%	82%
Canada	60%	62%	64%	65%	69%
China	75%	84%	73%	82%	82%
Colombia	63%	64%	62%	68%	76%
France	72%	61%	71%	74%	87%
Germany	27%	37%	40%	44%	55%
Hong Kong	88%	82%	80%	78%	87%
India	84%	81%	81%	82%	81%
Indonesia	51%	75%	70%	75%	79%
Italy	42%	57%	52%	55%	71%
Japan	21%	30%	25%	23%	43%
Malaysia	51%	66%	67%	74%	79%
Mexico	58%	62%	68%	71%	76%
Netherlands	33%	38%	48%	41%	50%
New Zealand	55%	51%	63%	61%	68%
Philippines	77%	75%	77%	73%	82%
Singapore	57%	66%	62%	72%	71%
South Africa	73%	64%	77%	78%	81%
South Korea	76%	75%	71%	75%	85%
Spain	42%	52%	61%	65%	74%
Taiwan	88%	83%	80%	87%	92%
Thailand	58%	74%	67%	68%	89%
UK	57%	59%	68%	61%	72%
UAE	78%	76%	77%	83%	81%
US	57%	64%	65%	65%	73%
Vietnam	78%	82%	79%	80%	79%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Rebuying By Country and Industry (Part 3)

KEY TAKEAWAYS

+ Japanese consumers are least likely to rebuy from all industries listed in this figure.

+ Chinese consumers have the highest propensity to rebuy from hotels (90%), while Taiwanese consumers do so for the airline industry (91%).

+ Thai consumers are most likely to purchase more from the auto dealers and property insurers that they have had a recent experience with.

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to purchase more from each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumers who are likely to rebuy after their most recent experience

■ Highest Rating
■ Lowest Rating

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	79%	80%	62%	79%	
Australia	79%	78%	70%	79%	76%
Belgium	69%	71%	59%	72%	
Brazil	81%	79%	69%	84%	63%
Canada	71%	71%	63%	70%	58%
China	89%	90%	86%	84%	83%
Colombia	79%	79%	66%	72%	
France	82%	81%	72%	85%	66%
Germany	51%	60%	43%	47%	35%
Hong Kong	85%	76%		88%	76%
India	82%	81%	87%	67%	83%
Indonesia	80%	78%	78%	75%	83%
Italy	66%	72%	60%	69%	46%
Japan	42%	47%	35%	44%	17%
Malaysia	72%	84%	70%	77%	75%
Mexico	80%	81%	76%	77%	73%
Netherlands	49%	61%	45%	52%	
New Zealand	82%	59%	61%	78%	58%
Philippines	86%	82%	80%	83%	80%
Singapore	82%	81%	83%	69%	78%
South Africa	71%	78%	73%	82%	73%
South Korea	82%	76%		87%	64%
Spain	76%	79%	61%	75%	56%
Taiwan	91%	86%	84%	88%	87%
Thailand	76%	73%	91%	74%	92%
UK	75%	72%		68%	
UAE	83%	85%	77%	79%	73%
US	77%	78%	65%	71%	64%
Vietnam	89%	87%	80%	71%	88%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

Consumer Rebuying By Country and Industry (Part 4)

Qualtrics **XM institute**™

KEY TAKEAWAYS

+ German consumers are least likely to purchase more from government agencies (21%) and hospitals and medical clinics (27%). Colleges and universities receive their lowest rebuying rate from UK consumers.

+ Chinese consumers have the highest propensity to rebuy from public utilities and health insurers, while the Japanese are the least likely to rebuy from these industries.

Consumers who are likely to rebuy after their most recent experience

■ Highest Rating
■ Lowest Rating

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	66%	46%	62%	63%	59%
Australia	70%	61%	65%	73%	65%
Belgium	54%	40%	49%	69%	57%
Brazil	74%	56%	78%	65%	69%
Canada	51%	48%	64%	64%	59%
China	78%	78%	90%	88%	68%
Colombia	72%	57%	74%	72%	65%
France			76%	71%	64%
Germany		21%	34%	39%	27%
Hong Kong	78%	77%	84%	80%	78%
India	75%	75%	80%	83%	77%
Indonesia	68%	59%	74%	83%	59%
Italy	52%	39%	44%	56%	42%
Japan			19%	31%	29%
Malaysia	64%	55%	68%	76%	64%
Mexico	68%	56%	77%	75%	62%
Netherlands	47%	30%	34%	44%	41%
New Zealand	61%	47%	69%	64%	65%
Philippines	73%	67%	81%	86%	70%
Singapore	67%	63%	72%	71%	55%
South Africa	74%	38%	75%	68%	70%
South Korea		62%	84%	72%	80%
Spain	60%	52%	61%	62%	57%
Taiwan	84%	74%	86%	87%	78%
Thailand	78%	57%	65%	84%	52%
UK	45%	47%	58%		50%
UAE	72%	80%	83%	80%	75%
US	63%	52%	69%	66%	55%
Vietnam	77%	83%	66%	88%	61%

Base: 33,093 consumers across 29 countries
Source: Qualtrics XM Institute Q3 2022 Global Consumer Study

ABOUT

This table shows the percentage of respondents from each country who are 'somewhat' or 'extremely likely' to purchase more from each industry. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

www.**xminstitute**.com
Copyright © 2022 Qualtrics®. All rights reserved.

Methodology

Qualtrics
XM institute™

DATA CALCULATION

Year-over-year calculations in **figures 2, 4, 10, 12, 18, 20, 26**, and **28** come from the Qualtrics XM Institute Q3 2021 Global Consumer Study of 24,000 consumers. This study surveyed a representative sample of 1,000 consumers from each of the following 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.

Calculations were only performed for industries within countries that received 100+ responses in both 2021 and 2022.

Year-over-year calculations were performed by subtracting the 2022 satisfaction, trust, advocacy, and likelihood to rebuy percentages as calculated below from their respective satisfaction, trust, advocacy, and likelihood to rebuy scores from 2021 calculated according to the same methodology.

Figures 1-8 were calculated by taking the total number of responses rating each country, industry, and industry within a country either 4 or 5 stars and dividing by the total number of responses for each country, industry, and industry within a country, respectively.

Figures 9-32 were calculated by taking the total number of responses for each country, industry, and industry within a country that was either 'somewhat' or 'extremely likely' and dividing by the total number of responses for each country, industry, and industry within a country, respectively.

The Overall number in **figures 1, 9, 17,** and **25** refers to the average across all relevant countries/industries for which there were more than 100 responses.

AUTHORS
Moira Dorsey, XMP – Principal XM Catalyst
Talia Quaadgras – Senior Research Associate
Julia Chang – Senior Research Associate