



DATA SNAPSHOT

Global Study: ROI of Customer Experience, 2023

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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 their responses, we examined the ROI of customer experience. Our analysis found that:

- + **Consumer satisfaction impacts key loyalty behaviors.** Satisfaction has a very strong correlation with consumers' likelihood to trust, recommend, and purchase more.
- + **Consumer likelihood to recommend and trust are similarly impacted by consumer satisfaction.** Compared to a 1-2-star experience, after a 5-star experience consumers are 3.1x more likely to both recommend and trust a company but are only 2.3x more likely to purchase more.
- + **The impact of satisfaction on loyalty metrics varies by country.** Satisfaction is least strongly correlated to loyalty behavior in China, where, after a 5-star experience, consumers are only 1.2x more likely to trust, 1.2x more likely to recommend, and 1.3x more likely to purchase more compared to their dissatisfied peers. Comparatively, following a 5-star experience, the French's likelihood to trust increases by 4.8x, Italians' likelihood to recommend increases by 4.4x, and Indonesians' likelihood to purchase more increases by 3.7x.
- + **Unsatisfying experiences impact parcel delivery services' loyalty metrics the most.** Across all industries, consumers are least likely to trust and recommend a parcel delivery service after a 1-2-star experience, with only 19% saying they are likely to perform either activity. Consumers are least likely to purchase more from government agencies after a 1-2-star experience.
- + **Hotels earn loyalty after satisfying experiences.** After 5-star experiences, consumers are most likely to trust and recommend a hotel. Ninety-one percent of hotel consumers are likely to recommend after a 5-star experience. On the other end of the spectrum, just 82% of government agency consumers would say the same.

STUDY KEY FACTS

- Global online study
- Conducted Q3 of 2022
- 33,093 consumers
- 29 countries
- 20 industries

Global Study: ROI of Customer Experience, 2023

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.

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Methodology

ROI: CX Correlates with Trust

KEY TAKEAWAYS

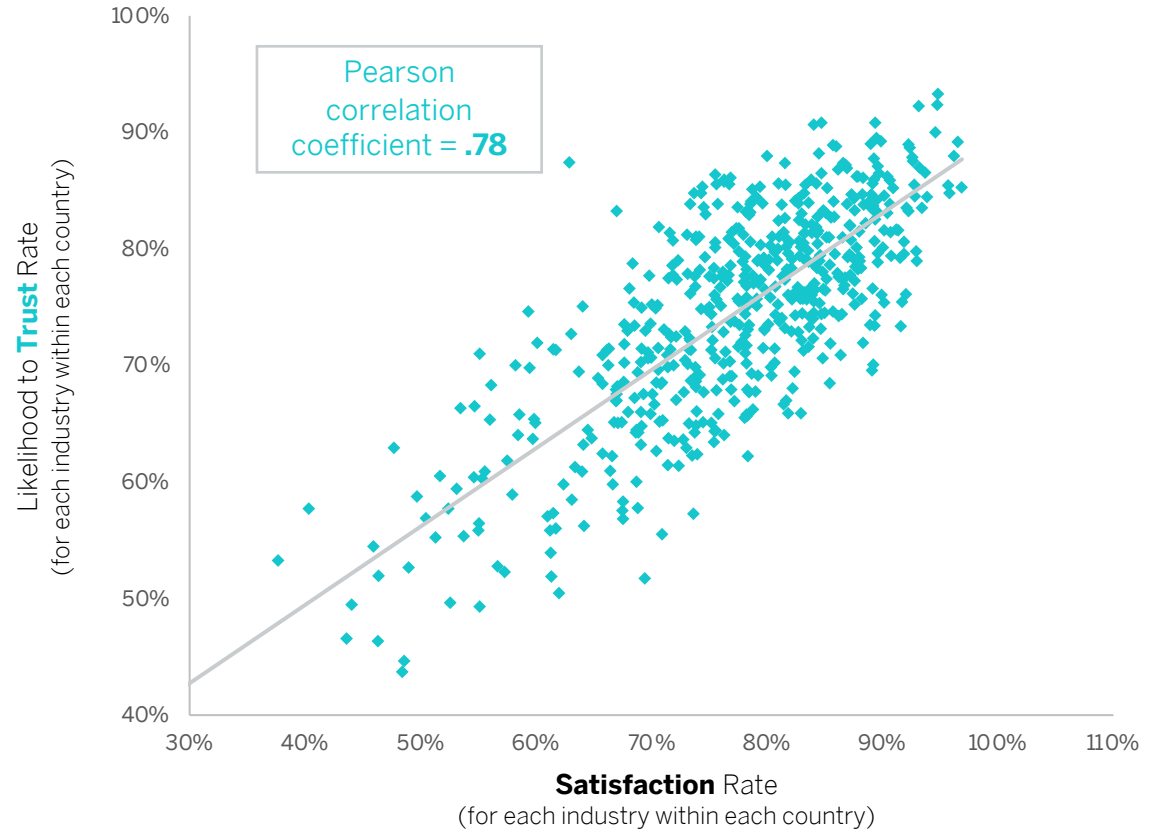
- + With a Pearson correlation coefficient of **0.78**, there is a very high correlation between customer experience (CX) and likelihood to trust.

ABOUT

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

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

29 countries across 20 industries, 556 data points



Base: 33,093 consumers across 29 countries

Source: Qualtrics XM Institute Q3 2022 Global Consumer Trends Study

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ROI: CX Correlates with Recommending

KEY TAKEAWAYS

- + With a Pearson correlation coefficient of **0.81**, there is a very high correlation between customer experience (CX) and likelihood to recommend.

ABOUT

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

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

29 countries across 20 industries, 556 data points



Base: 33,093 consumers across 29 countries

Source: Qualtrics XM Institute Q3 2022 Global Consumer Trends Study

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ROI: CX Correlates with Purchasing More

KEY TAKEAWAYS

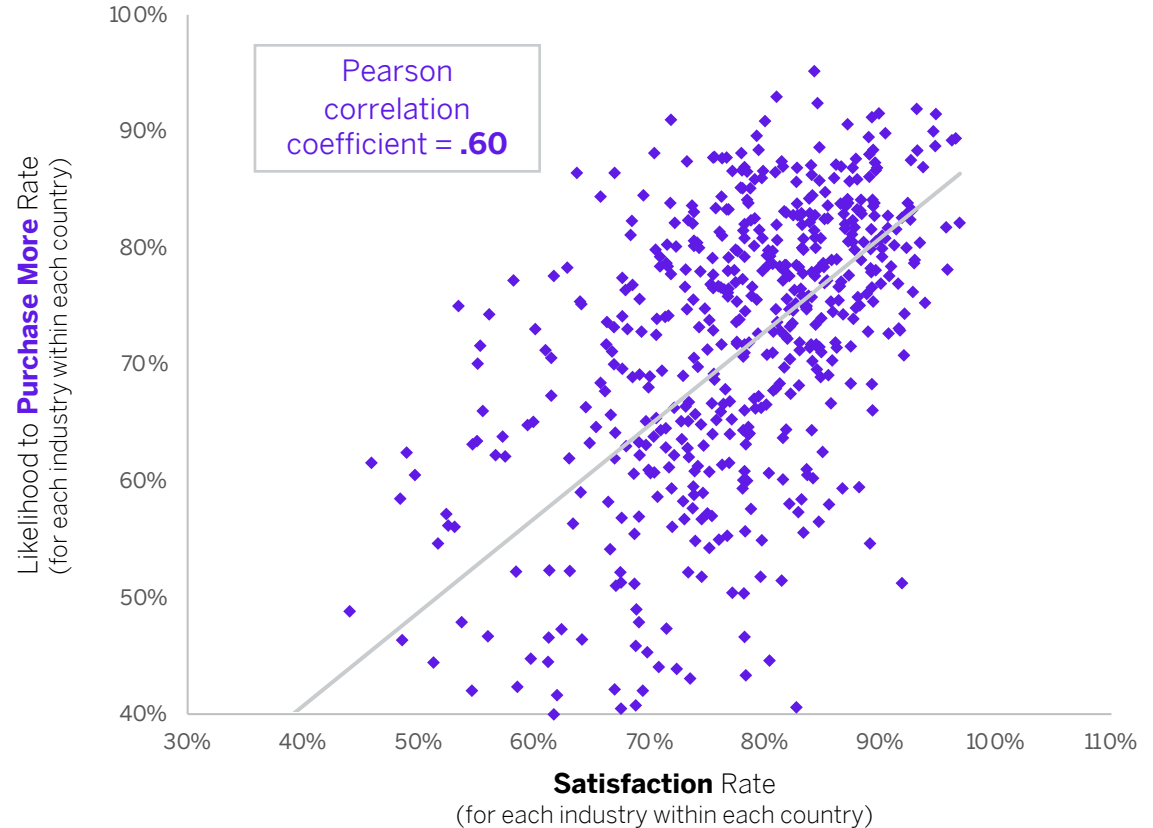
- + With a Pearson correlation coefficient of **0.60**, there is a very high correlation between customer experience (CX) and likelihood to purchase more.

ABOUT

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

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

29 countries across 20 industries, 556 data points



Base: 33,093 consumers across 29 countries

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CX and Loyalty Connections – Overall

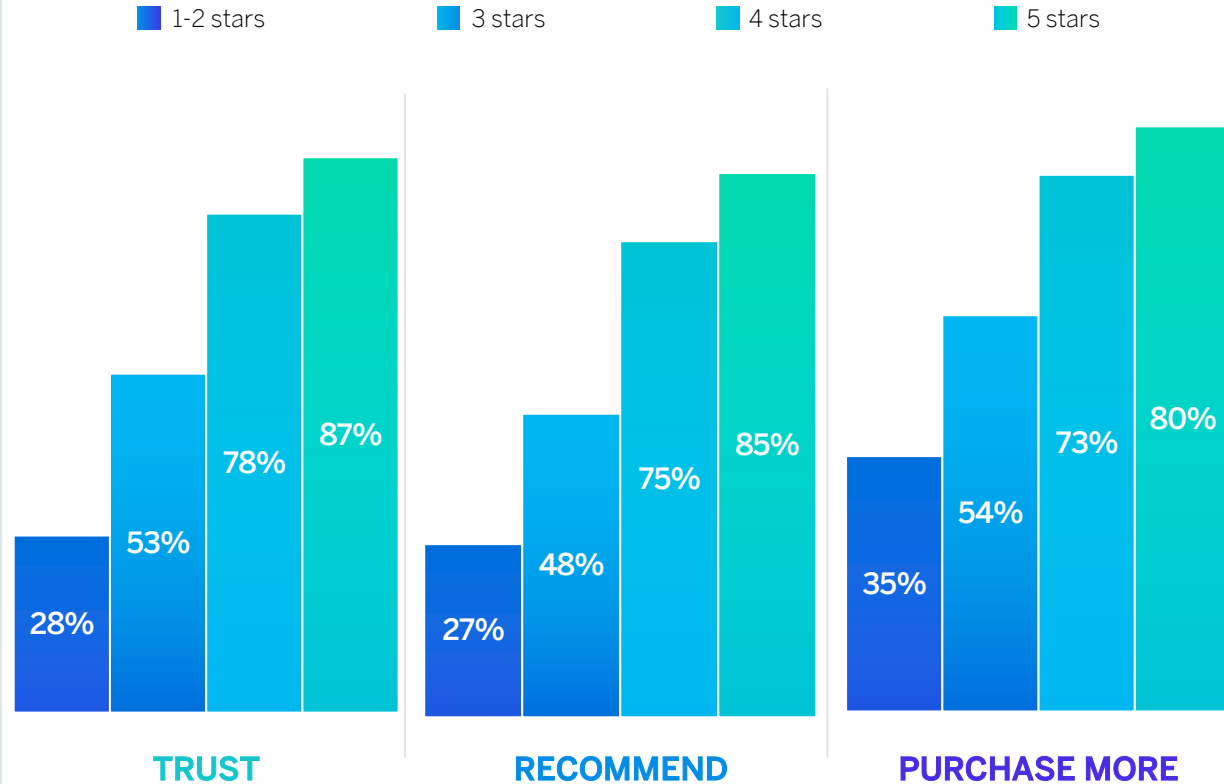
KEY TAKEAWAYS

- + There is a **59**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Trust Connections – by Industry

KEY TAKEAWAYS

- + Consumers are most likely to trust colleges/universities after a 1-4-star experience, and most likely to trust hotels after a 5- star experience.
- + Consumers are least likely to trust parcel delivery services after a very negative experience and are least likely to trust online retailers after middling experiences.
- + Government agencies garner the least trust from consumers after a 5-star satisfactory experience.

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

Lowest Trust Rate
 Highest Trust Rate

	1-2 stars	3 stars	4 stars	5 stars
Airline	29%	55%	82%	88%
Auto dealer	31%	52%	77%	87%
Bank	27%	53%	77%	85%
College/ University	40%	64%	84%	87%
Credit Card Provider	25%	51%	76%	86%
Department Store	29%	57%	78%	87%
Electronics maker	36%	63%	84%	89%
Fast Food	29%	48%	74%	85%
Government Agency	21%	46%	79%	84%
Health Insurance	29%	58%	81%	88%
Hospital/Medical Clinic	37%	63%	84%	89%
Hotel	37%	56%	80%	89%
Internet Service Provider	25%	51%	76%	86%
Mobile Phone Provider	23%	48%	75%	84%
Online Retailer	34%	48%	73%	86%
Parcel Delivery	19%	45%	75%	87%
Property Insurance	29%	52%	78%	88%
Public Utility	24%	53%	79%	86%
Streaming	30%	50%	73%	86%
Supermarket	38%	56%	79%	88%

ABOUT

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

CX and Recommend Connections – by Industry

KEY TAKEAWAYS

- + Electronics consumers are most likely to recommend after a 3-4-star satisfactory experience.
- + After 1-2-star experiences, consumers are least likely to recommend parcel delivery services and are most likely to recommend colleges/universities.
- + Consumers are most likely to recommend a hotel after a 5-star experience.

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars
Airline	30%	57%	82%	88%
Auto dealer	29%	51%	75%	86%
Bank	26%	41%	69%	82%
College/ University	40%	61%	82%	86%
Credit Card Provider	25%	41%	71%	83%
Department Store	29%	56%	77%	87%
Electronics maker	36%	64%	82%	88%
Fast Food	29%	47%	75%	86%
Government Agency	20%	39%	72%	82%
Health Insurance	28%	51%	78%	87%
Hospital/Medical Clinic	35%	46%	71%	83%
Hotel	38%	54%	81%	91%
Internet Service Provider	26%	48%	75%	85%
Mobile Phone Provider	24%	46%	73%	84%
Online Retailer	33%	48%	75%	85%
Parcel Delivery	19%	43%	69%	84%
Property Insurance	28%	50%	76%	87%
Public Utility	24%	42%	70%	82%
Streaming	29%	54%	76%	88%
Supermarket	38%	47%	75%	86%

CX and Purchase More Connections – by Industry

KEY TAKEAWAYS

- + Banks are least likely to have their consumers purchase more after a 3-4- star experience.
- + After 1-2- star experiences, consumers are least likely to purchase more from government agencies.
- + Supermarkets are most likely to have consumers purchase more after an unsatisfactory experience.
- + Electronics makers are most likely to have customers that purchase more after a 4-5- star experience.

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars
Airline	41%	62%	80%	85%
Auto dealer	34%	52%	72%	81%
Bank	28%	41%	60%	69%
College/ University	36%	52%	70%	77%
Credit Card Provider	31%	48%	70%	78%
Department Store	42%	64%	79%	85%
Electronics maker	45%	64%	81%	87%
Fast Food	38%	60%	79%	84%
Government Agency	26%	43%	66%	76%
Health Insurance	36%	55%	75%	82%
Hospital/Medical Clinic	34%	46%	60%	67%
Hotel	34%	54%	78%	85%
Internet Service Provider	34%	55%	73%	79%
Mobile Phone Provider	30%	51%	69%	76%
Online Retailer	46%	60%	79%	85%
Parcel Delivery	34%	55%	75%	80%
Property Insurance	31%	53%	75%	84%
Public Utility	41%	56%	72%	78%
Streaming	44%	57%	75%	82%
Supermarket	55%	66%	79%	84%

CX and Loyalty Connections – Airlines

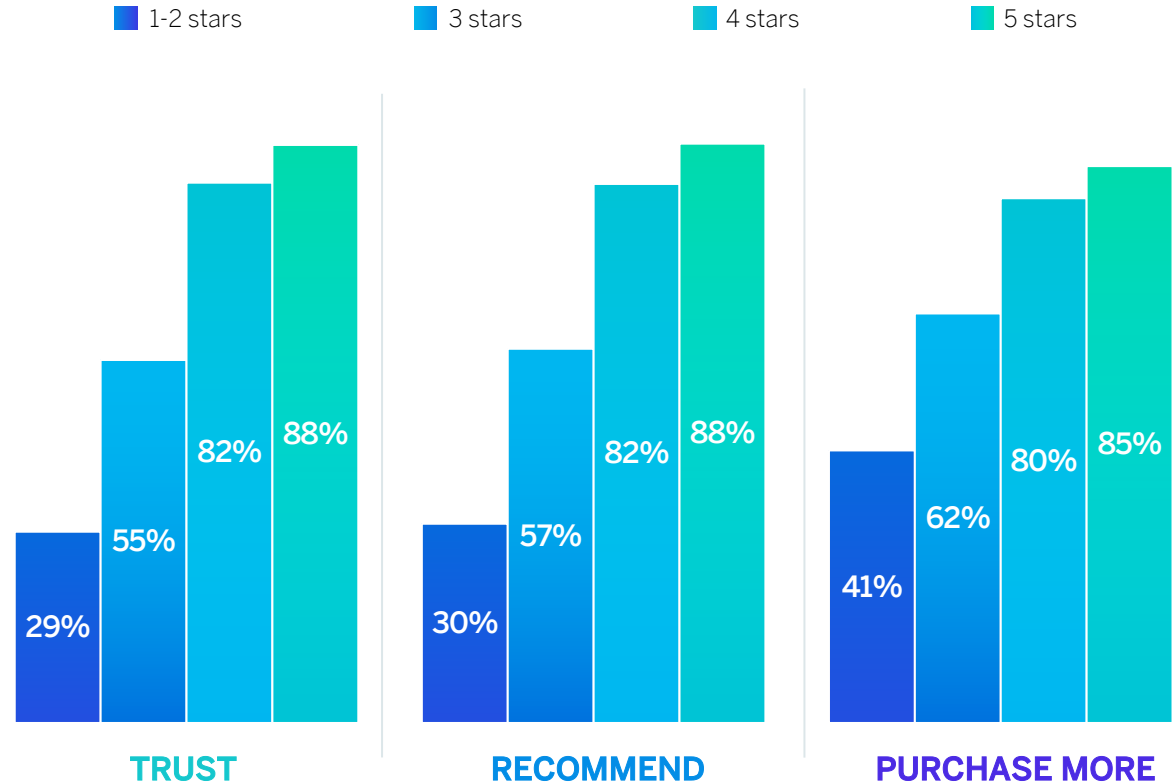
KEY TAKEAWAYS

- + There is a **59**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.0x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Auto Dealers

KEY TAKEAWAYS

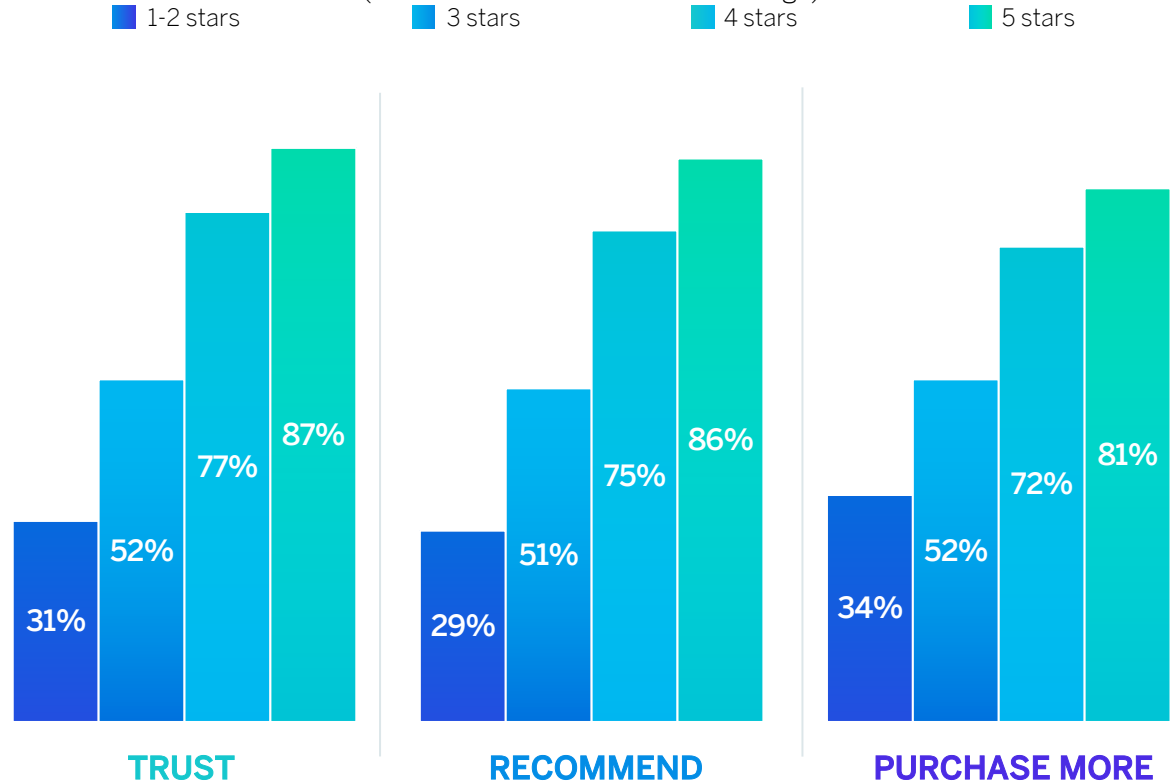
- + There is a **56-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **57-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.4x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

Auto dealer consumers who say they are 'somewhat' or 'very' likely to:

(out of 1- to 5-star satisfaction ratings)



CX and Loyalty Connections – Bank

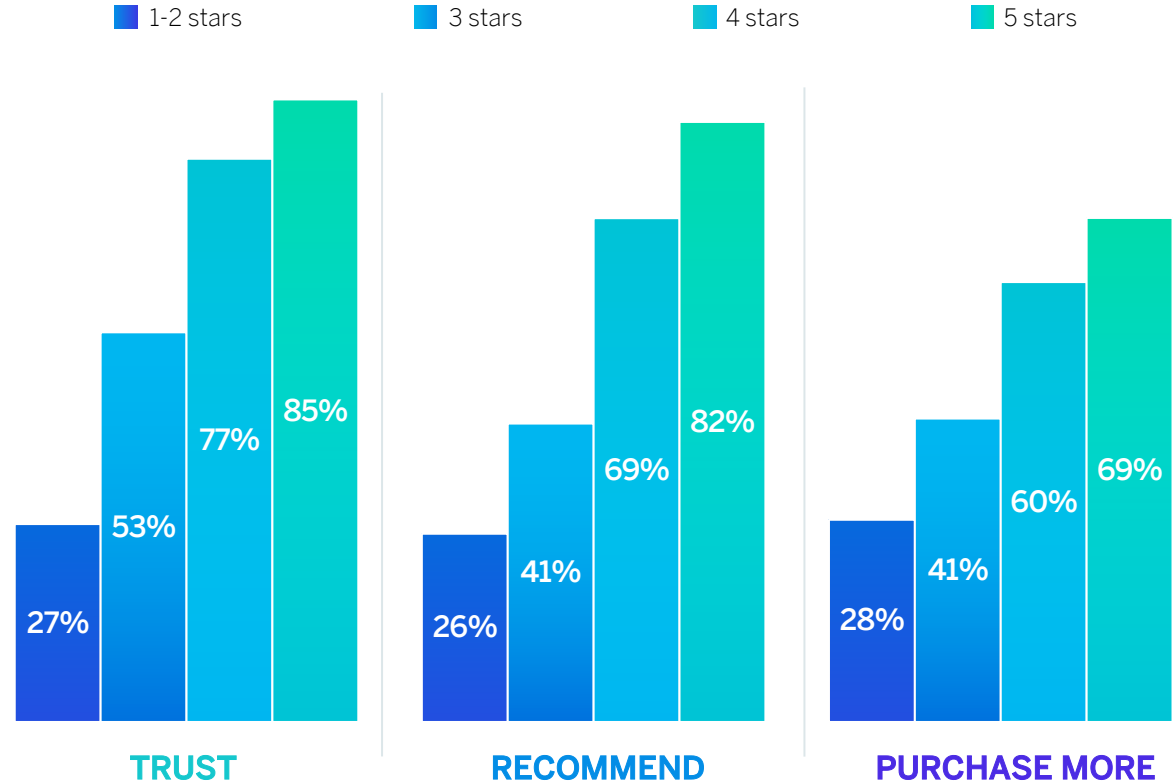
KEY TAKEAWAYS

- + There is a **58-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **56-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **3.2x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – College/University

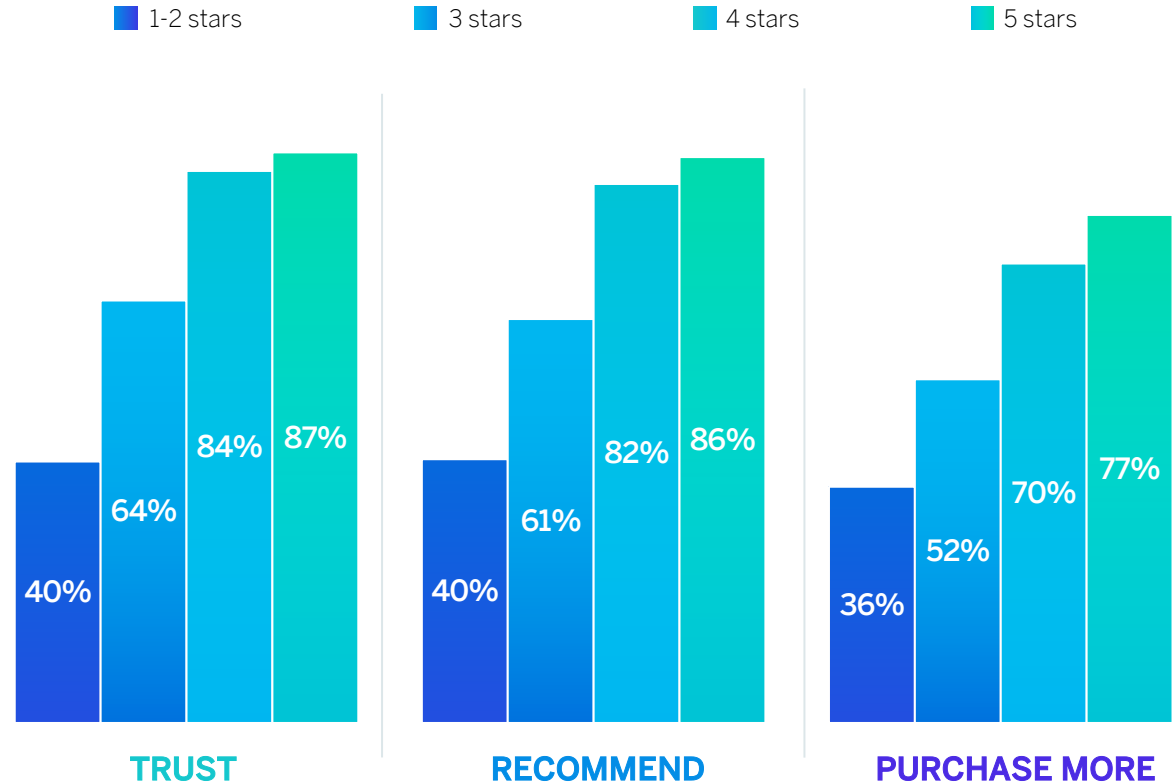
KEY TAKEAWAYS

- + There is a **47**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **46**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.2x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Credit Card Providers

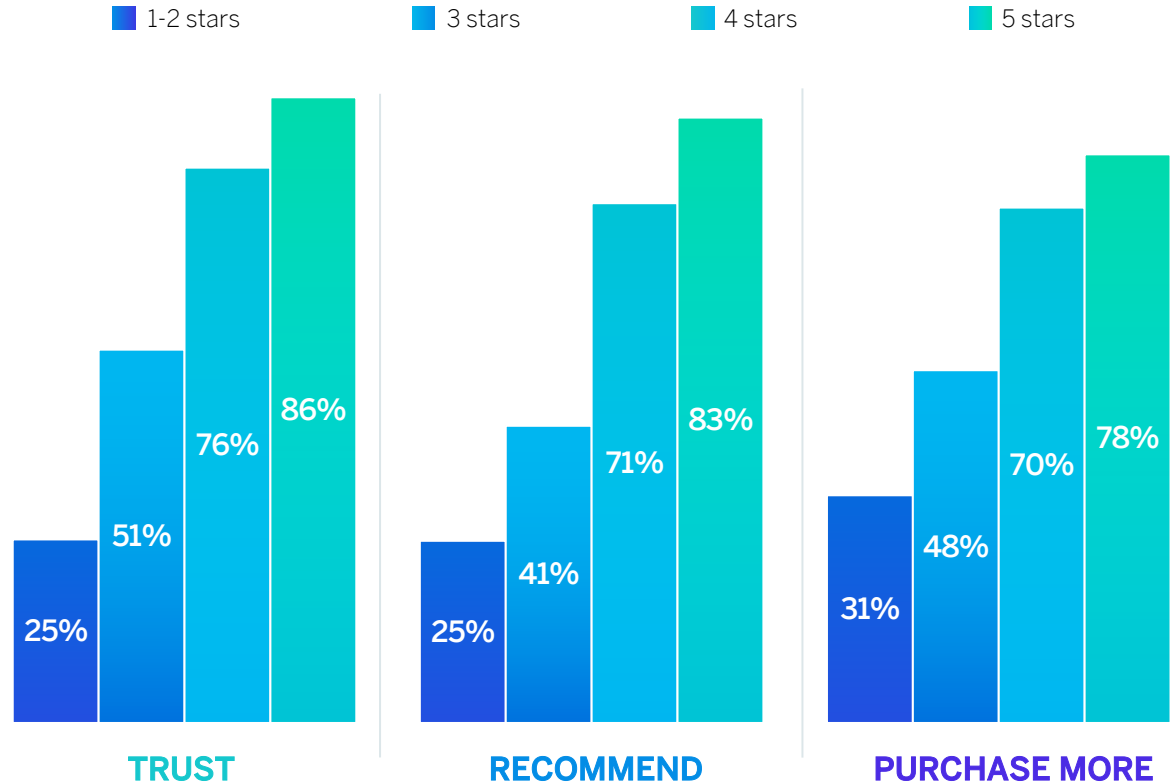
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- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Department Store

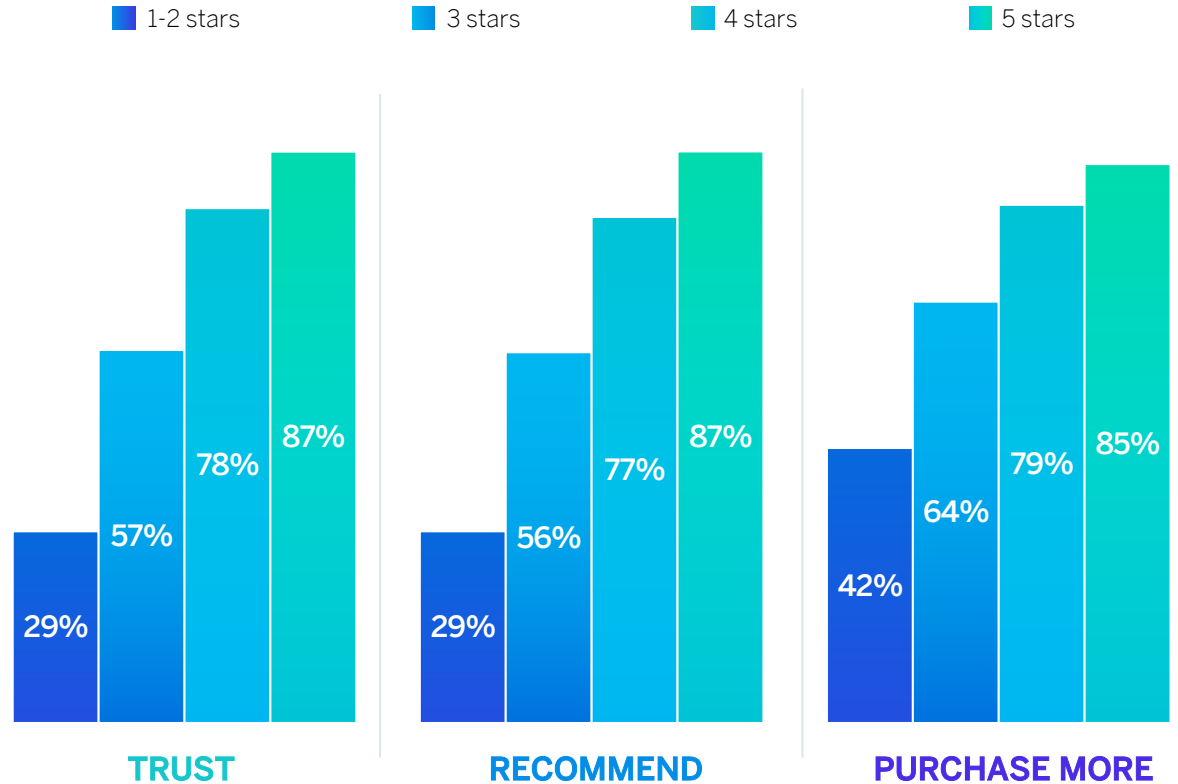
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- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.0x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Electronics Maker

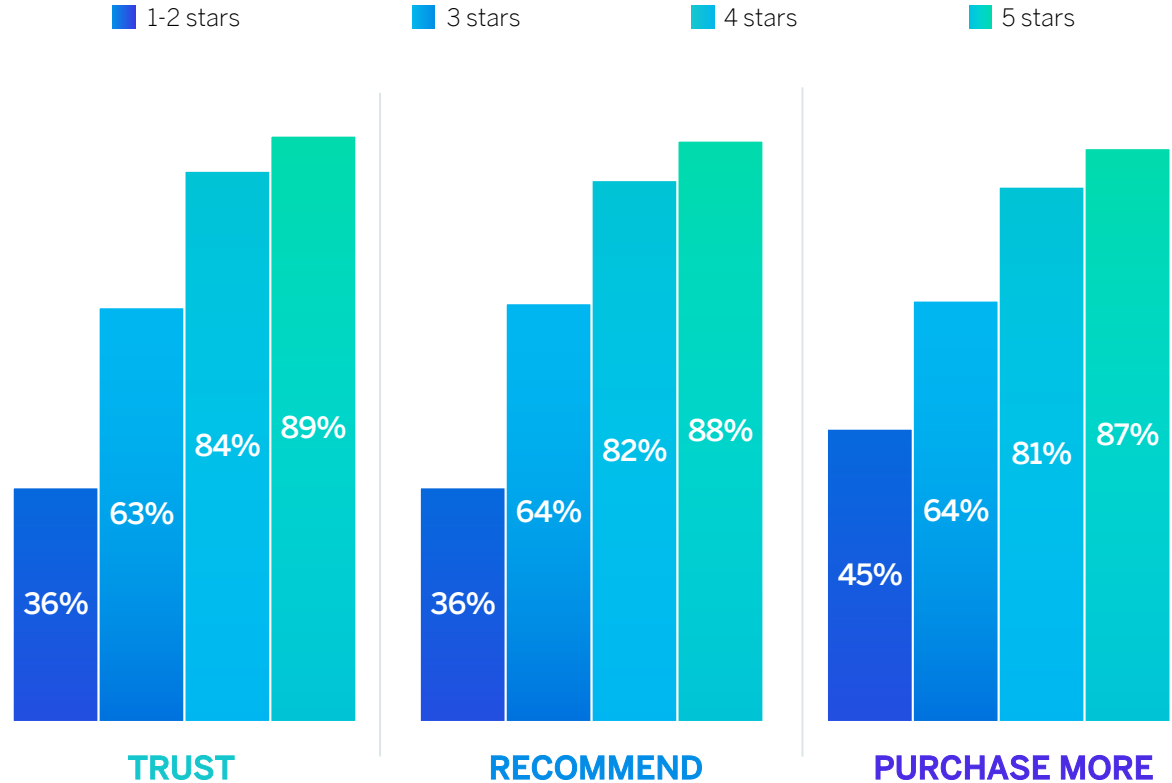
KEY TAKEAWAYS

- + There is a **53**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **53**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.0x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Fast Food

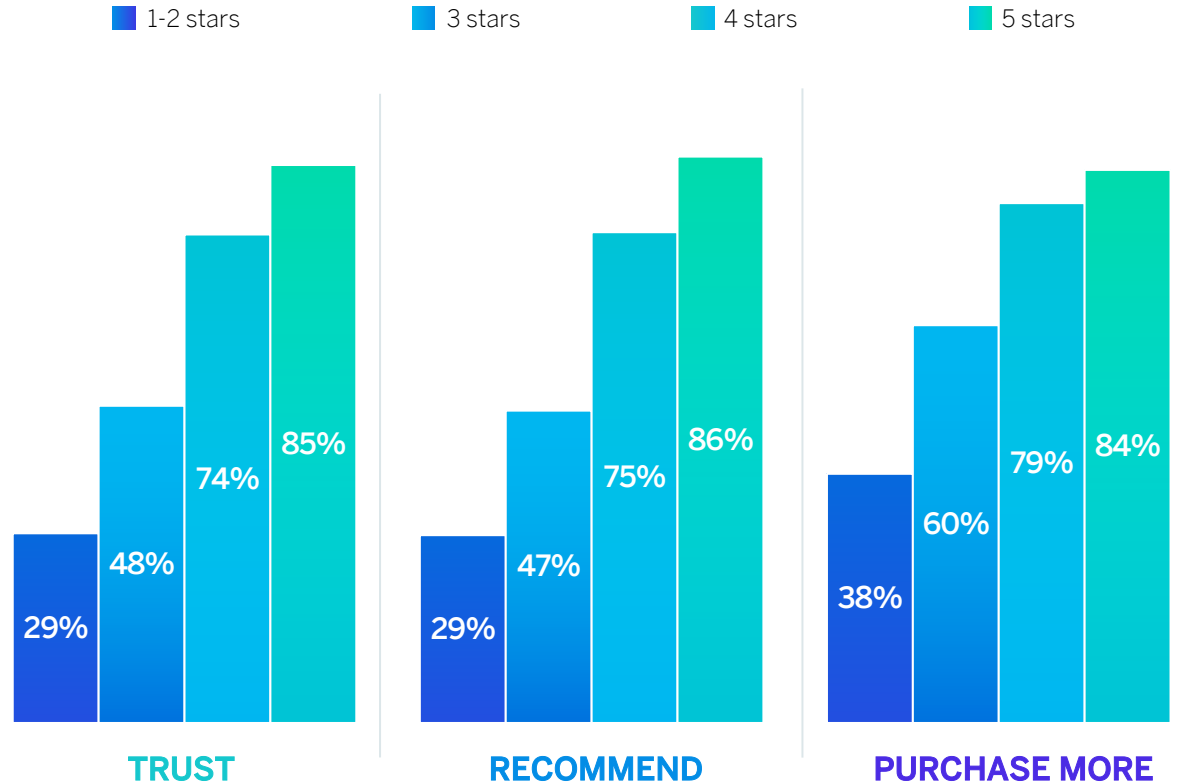
KEY TAKEAWAYS

- + There is a **56-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **57-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.2x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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

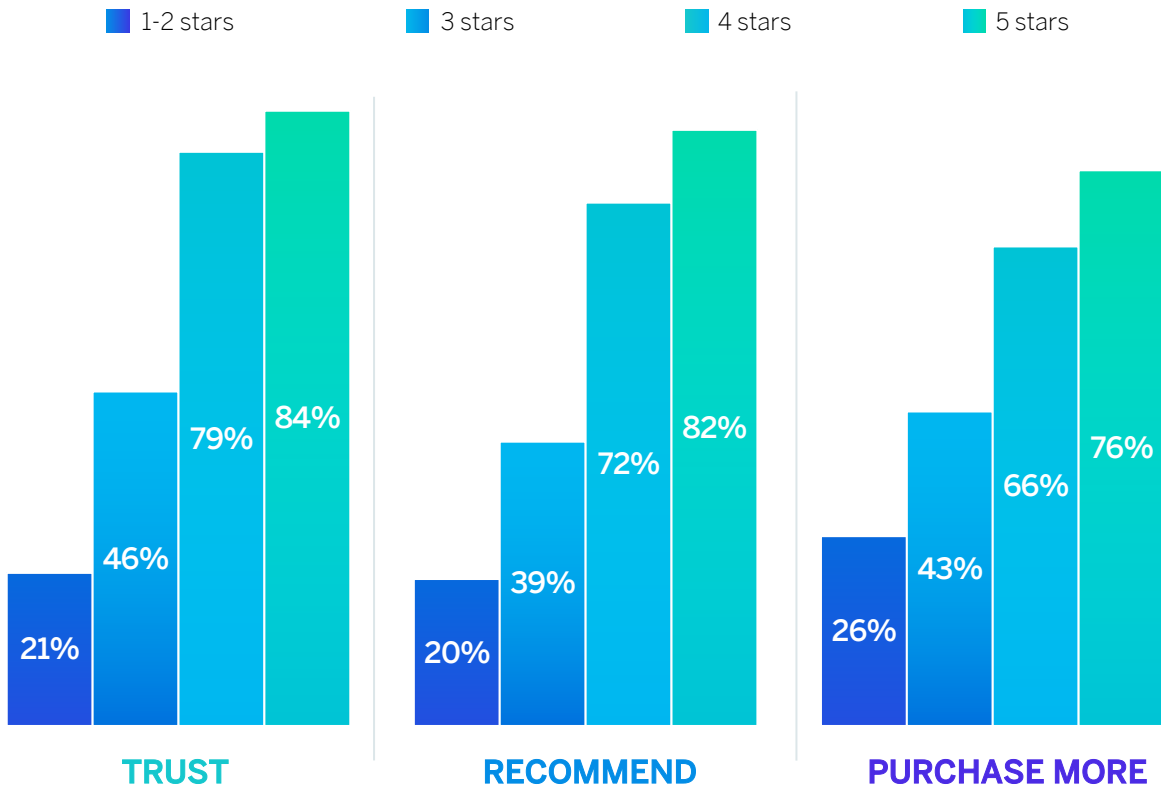


CX and Loyalty Connections – Government Agency

KEY TAKEAWAYS

- + There is a **63**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **62**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.9x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

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



ABOUT

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

CX and Loyalty Connections – Health Insurance

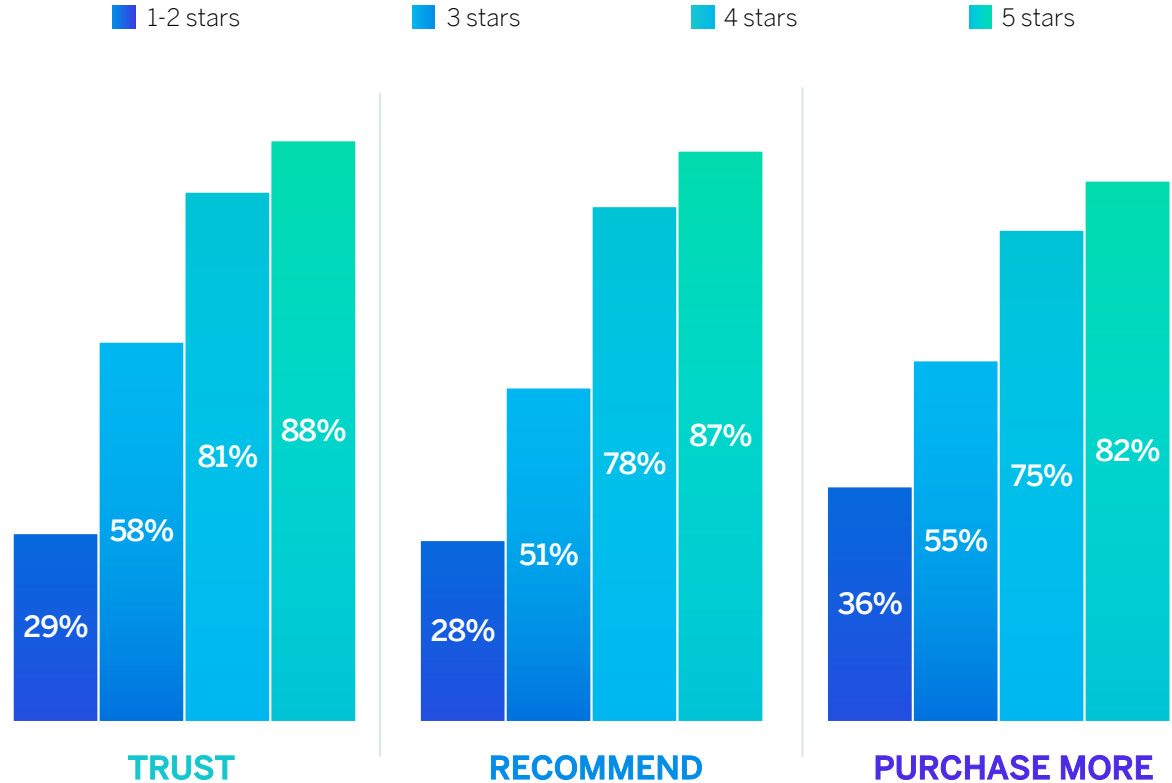
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- + There is a **59-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Hospital/ Medical Clinic

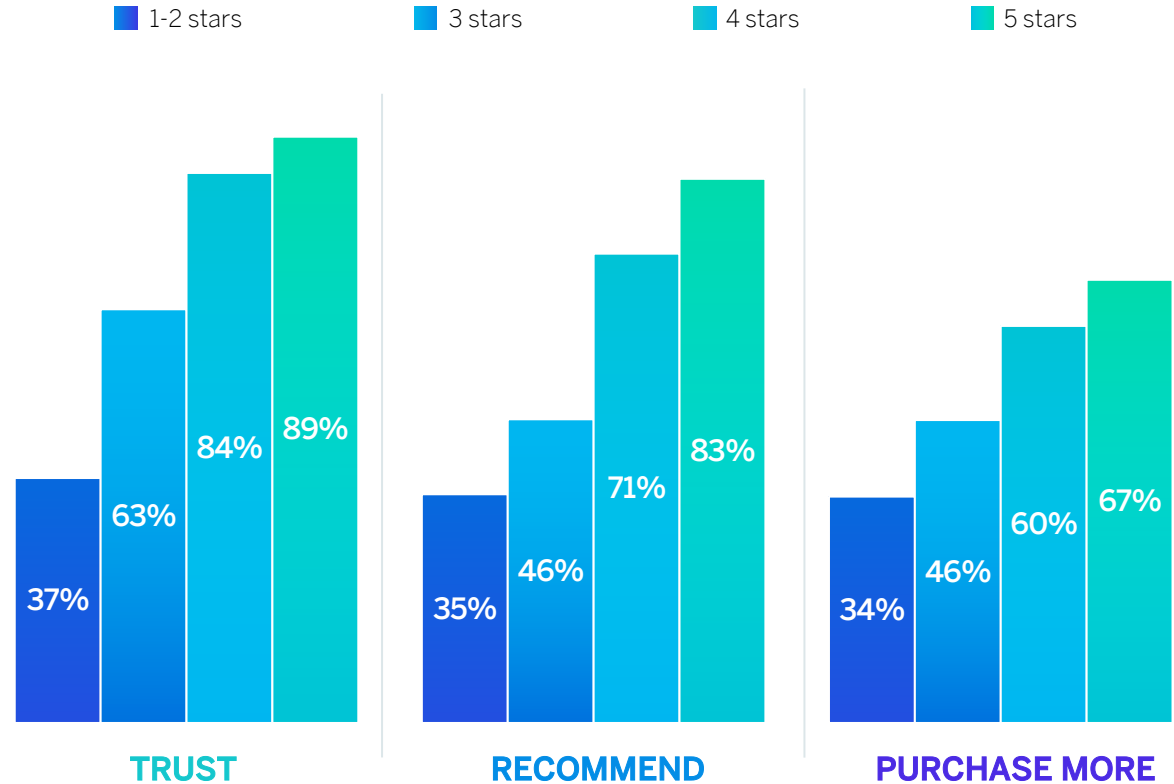
KEY TAKEAWAYS

- + There is a **52-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **48-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.0x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Hotel

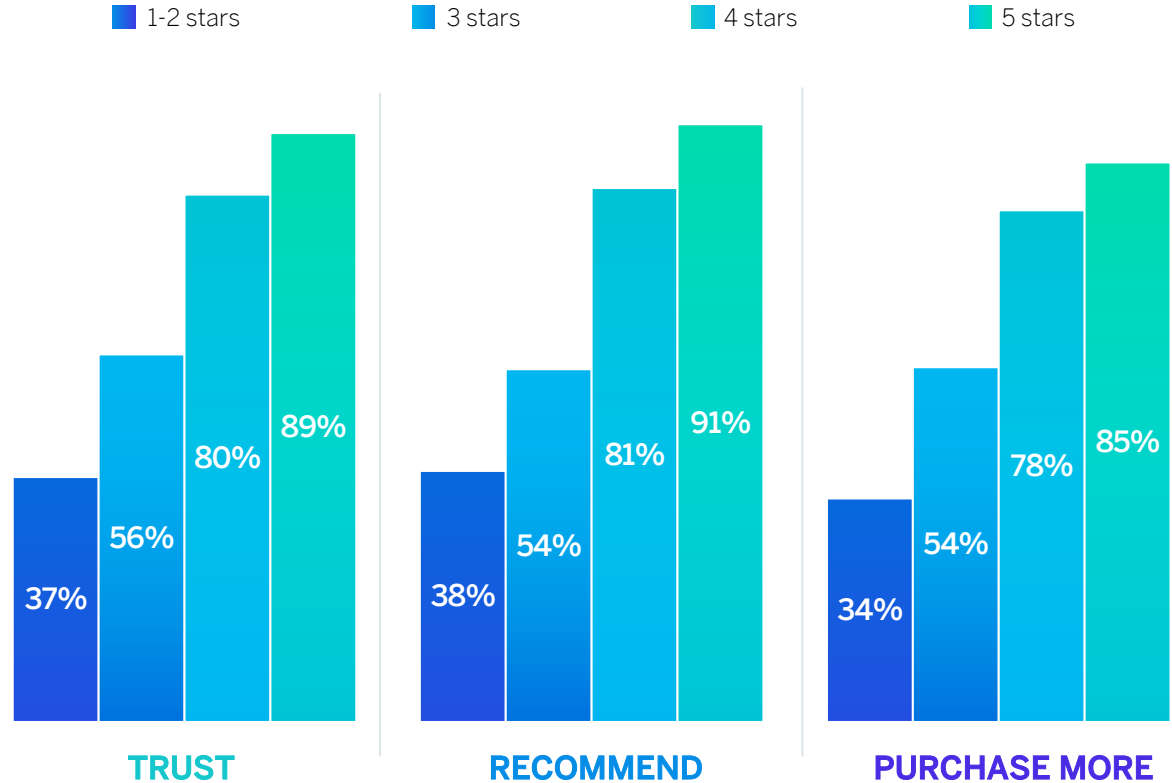
KEY TAKEAWAYS

- + There is a **52**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **53**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Internet Service Provider

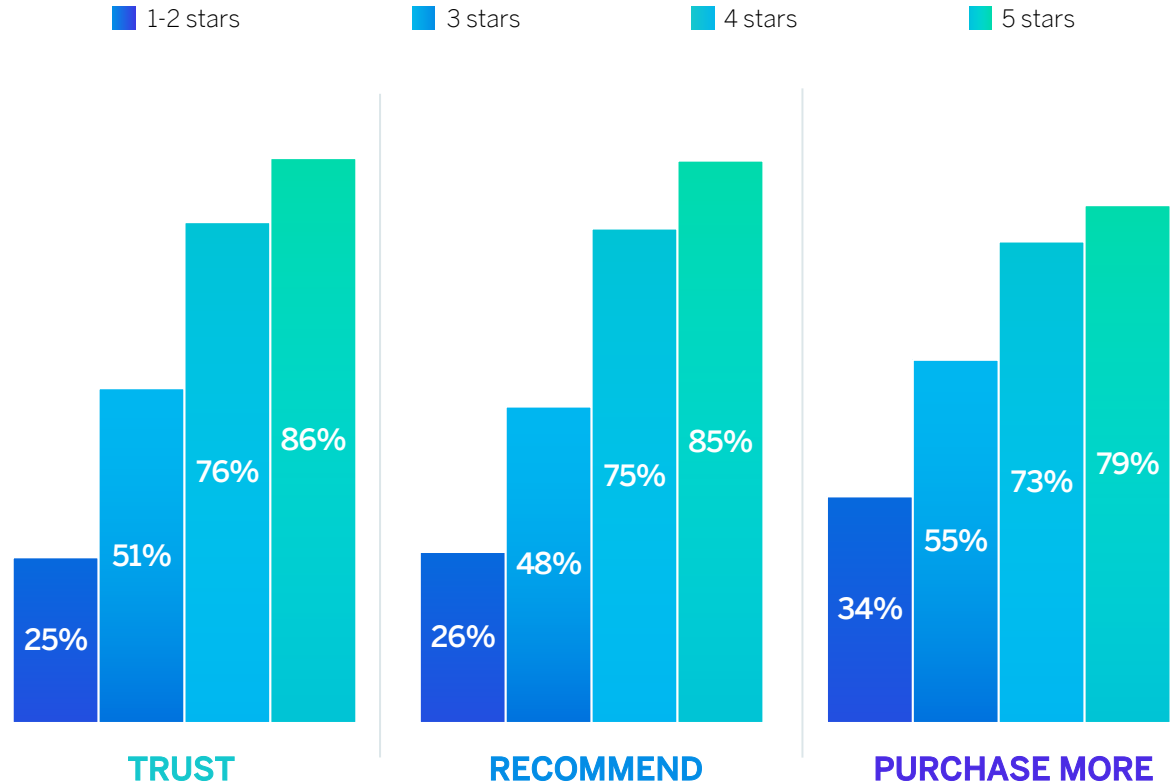
KEY TAKEAWAYS

- + There is a **61**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **59**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Mobile Phone Provider

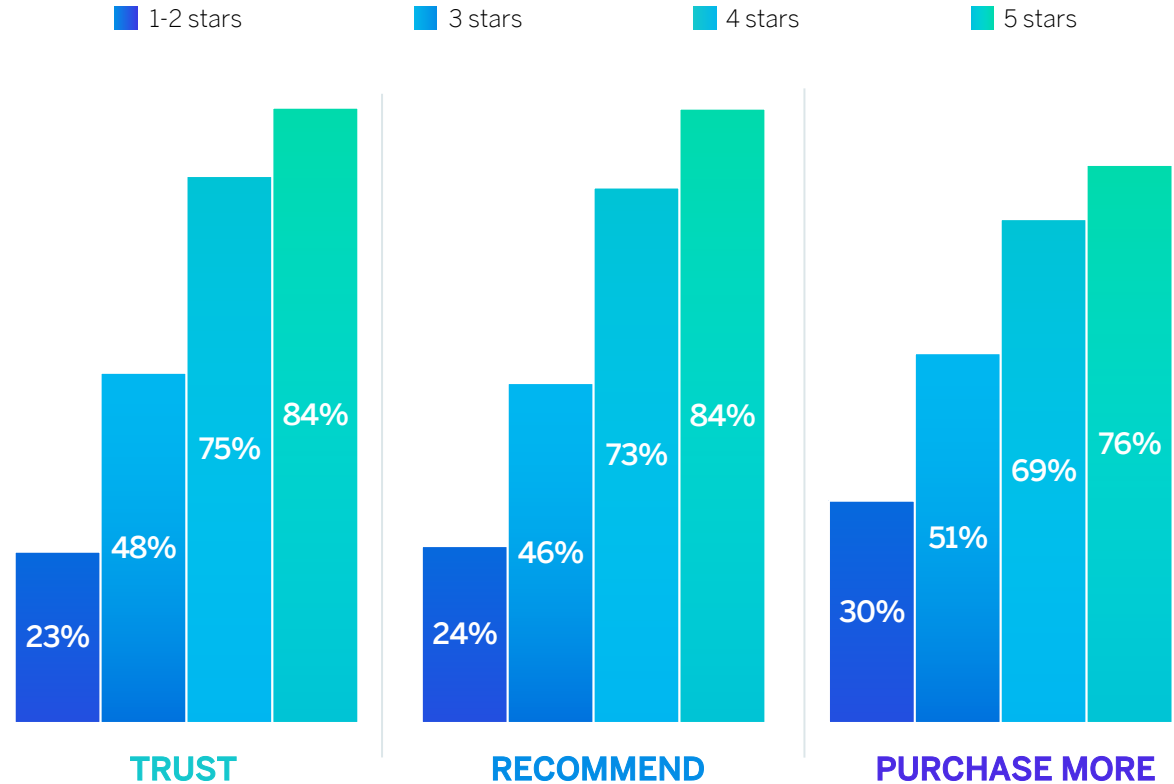
KEY TAKEAWAYS

- + There is a **61-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **60-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Online Retailer

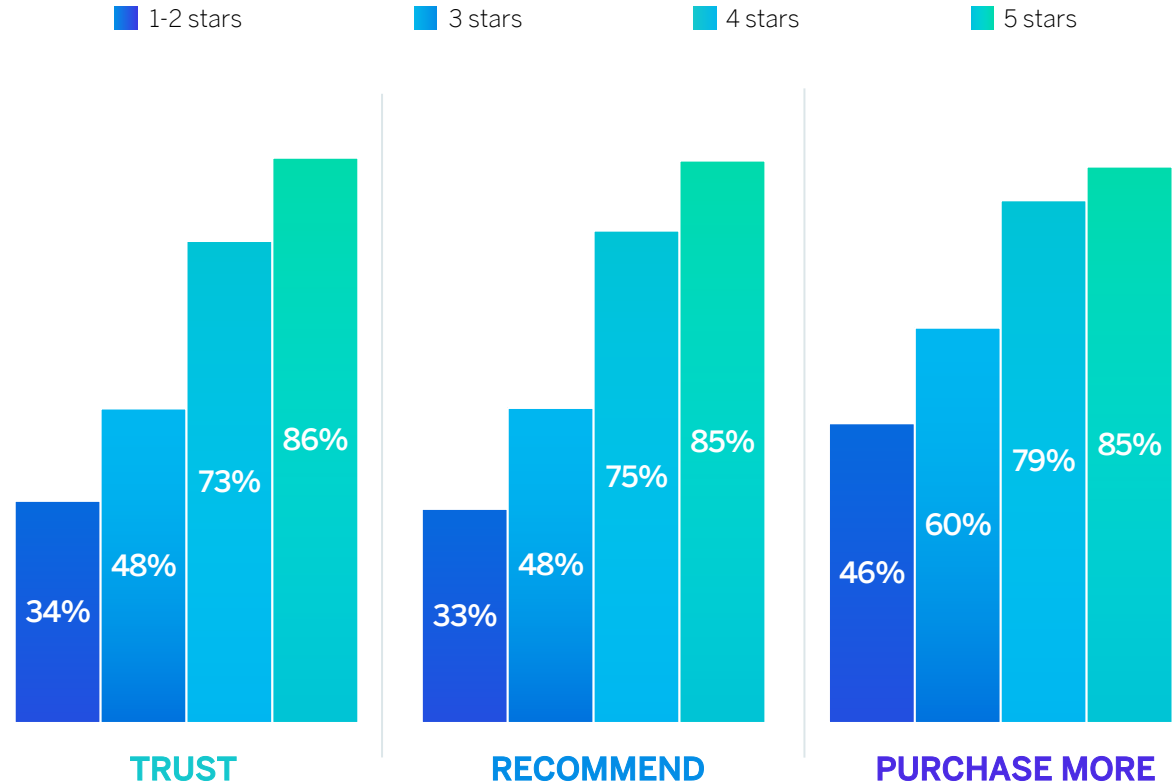
KEY TAKEAWAYS

- + There is a **52**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **53**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **1.9x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Parcel Delivery Service

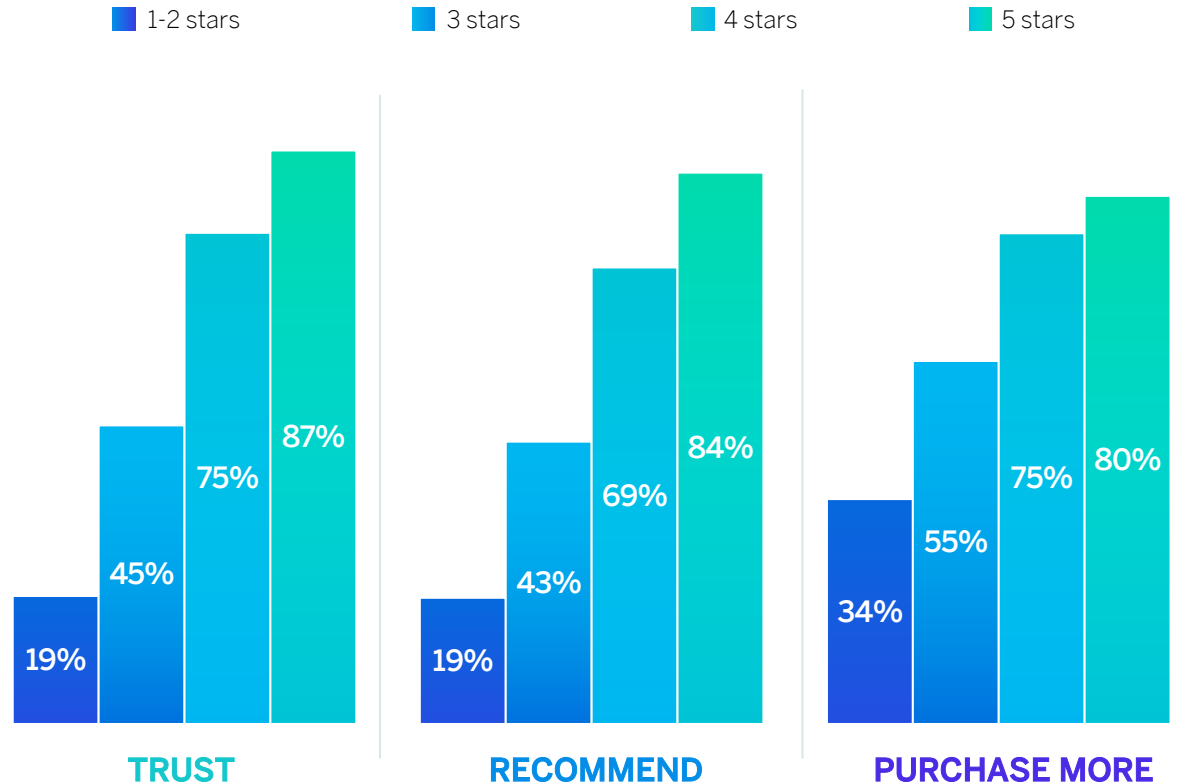
KEY TAKEAWAYS

- + There is a **68**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **65**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.3x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Property Insurance

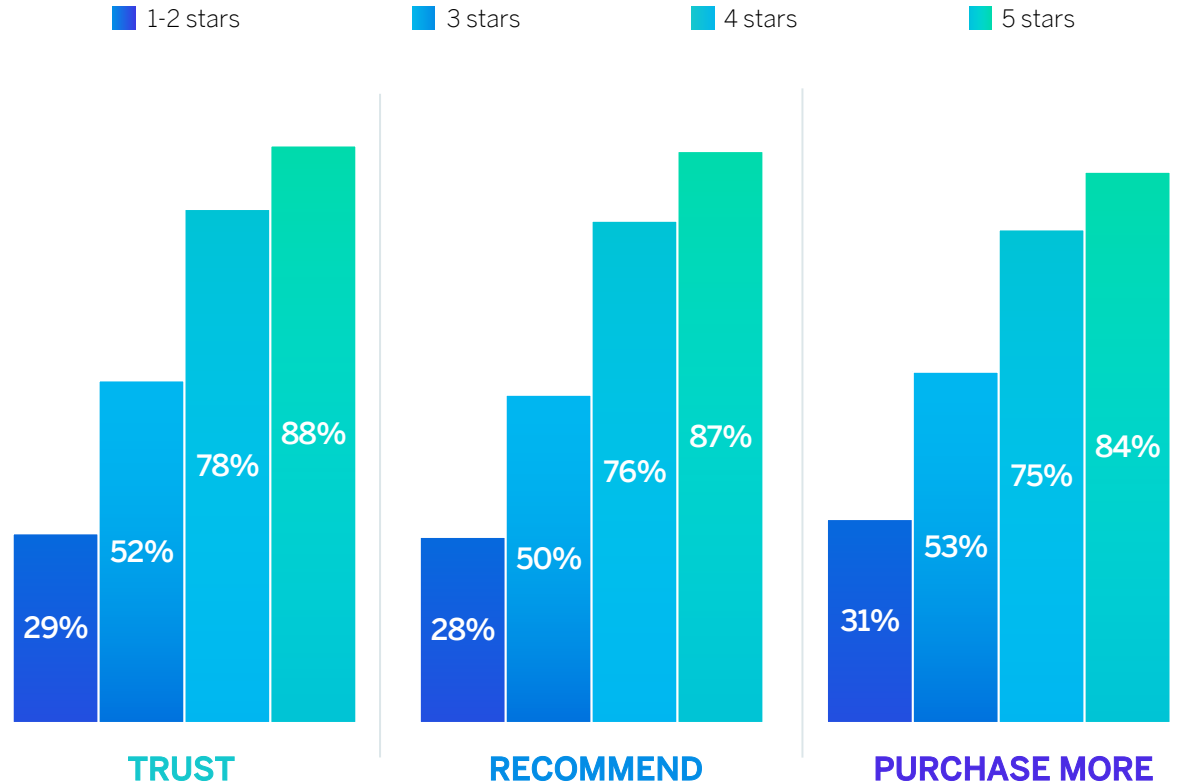
KEY TAKEAWAYS

- + There is a **59-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **59-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **2.7x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Public Utility

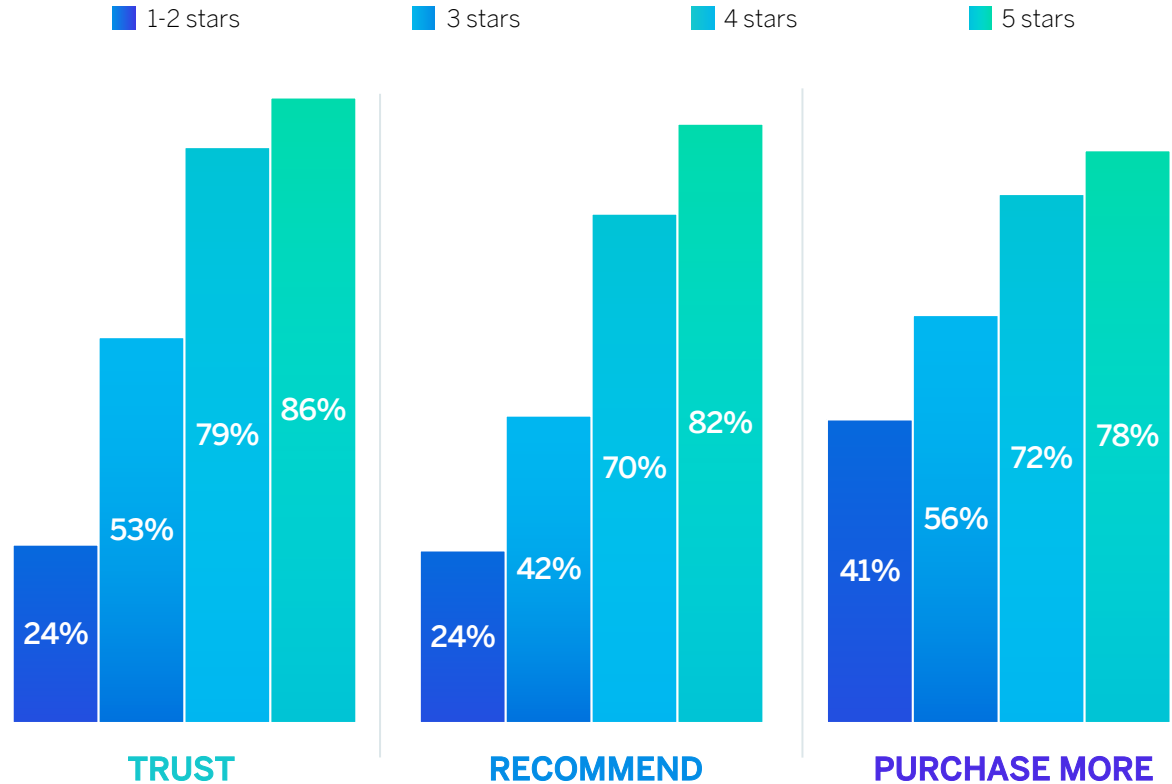
KEY TAKEAWAYS

- + There is a **62**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **1.9x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Streaming

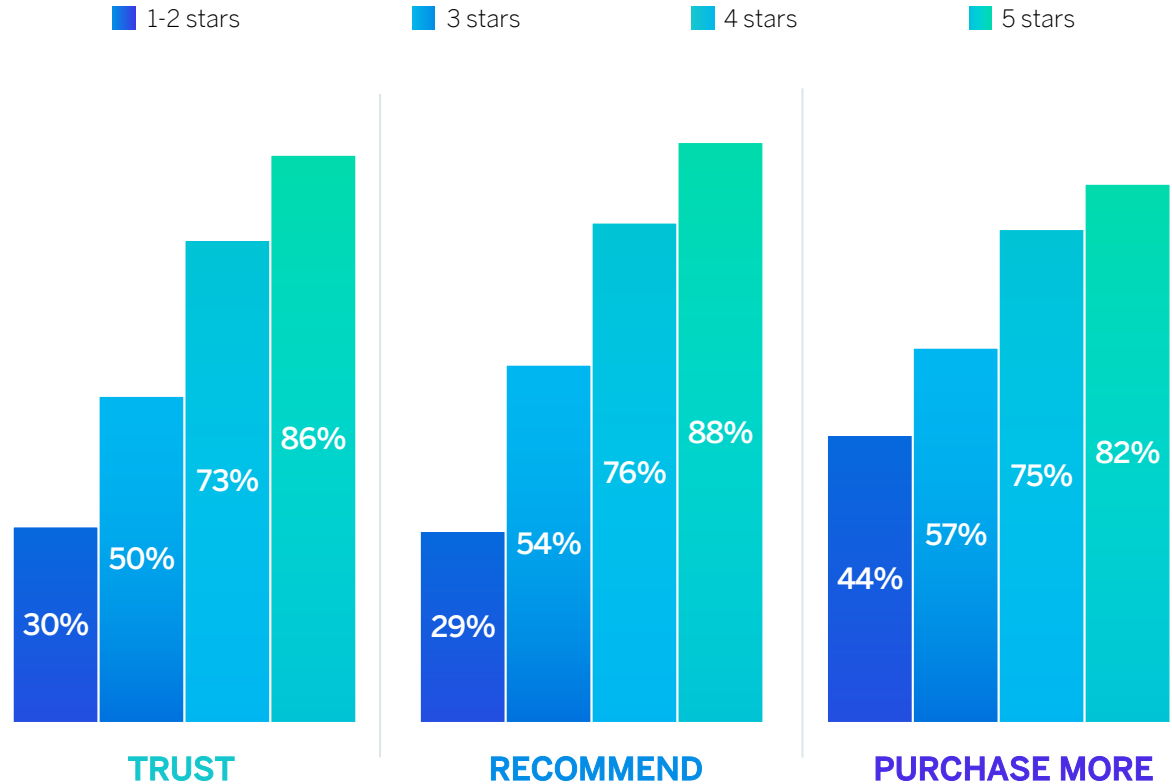
KEY TAKEAWAYS

- + There is a **56-point** gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **59-point** gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **1.9x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Loyalty Connections – Supermarket

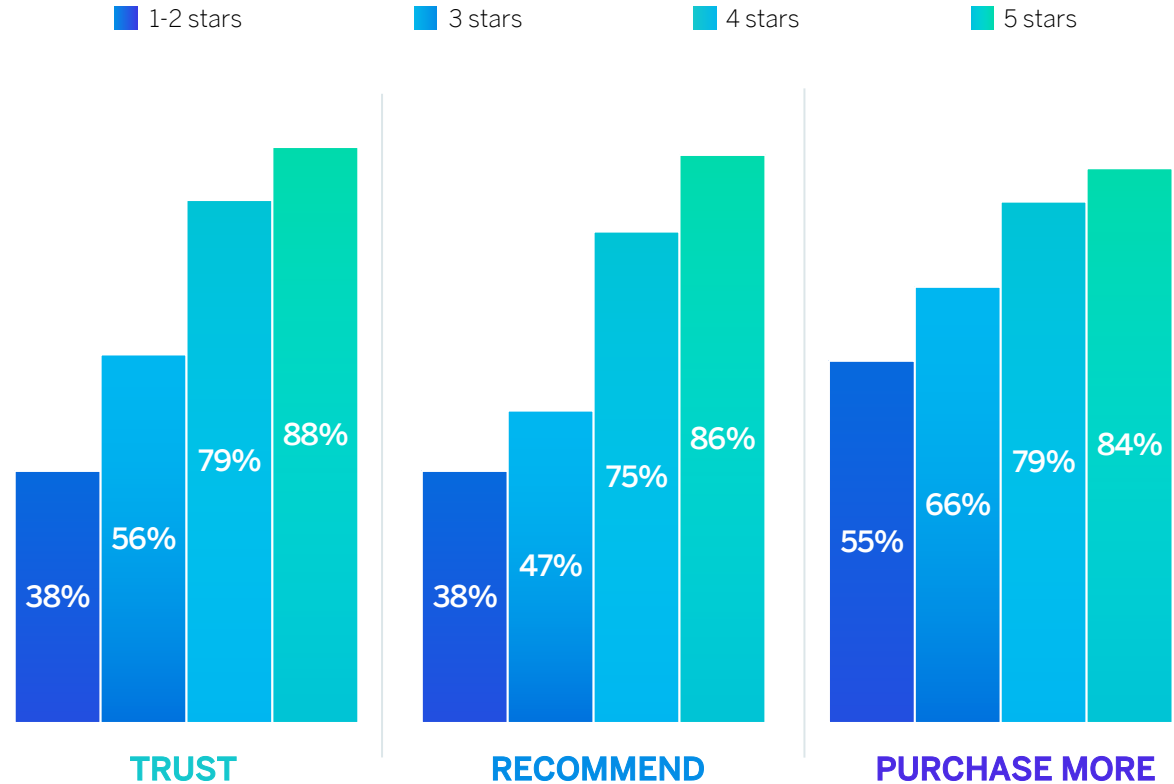
KEY TAKEAWAYS

- + There is a **60**-point gap in the likelihood to trust between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + There is a **58**-point gap in the likelihood to recommend between consumers who gave their recent experience a 5-star satisfaction rating and those who gave it a 1- or 2-star rating.
- + Consumers are **1.5x** as likely to purchase more from a company after a 5-star experience compared to a 1- or 2-star experience.

ABOUT

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

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



CX and Trust Connections – by Country

KEY TAKEAWAYS

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

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars	5 stars vs 1-2 stars
Argentina	29%	52%	75%	84%	2.9x
Australia	25%	51%	78%	88%	3.6x
Belgium	23%	49%	75%	87%	3.7x
Brazil	33%	57%	77%	84%	2.5x
Canada	21%	45%	75%	86%	4.1x
China	72%	76%	83%	86%	1.2x
Colombia	32%	57%	78%	85%	2.7x
France	19%	52%	82%	91%	4.8x
Germany	22%	43%	65%	83%	3.7x
Hong Kong	39%	60%	84%	90%	2.3x
India	51%	73%	88%	84%	1.6x
Indonesia	22%	49%	76%	89%	4.1x
Italy	20%	43%	71%	84%	4.2x
Japan	22%	44%	73%	82%	3.8x
Malaysia	21%	50%	79%	86%	4.1x
Mexico	36%	60%	78%	85%	2.4x
Netherlands	20%	46%	74%	89%	4.4x
New Zealand	25%	48%	76%	87%	3.5x
Philippines	35%	63%	86%	90%	2.6x
Singapore	27%	56%	82%	89%	3.3x
South Africa	31%	60%	79%	88%	2.8x
South Korea	29%	44%	72%	85%	3.0x
Spain	23%	45%	75%	86%	3.8x
Taiwan	37%	64%	82%	93%	2.5x
Thailand	36%	58%	84%	88%	2.5x
UK	19%	50%	77%	85%	4.5x
UAE	40%	66%	85%	90%	2.2x
US	22%	45%	72%	82%	3.7x
Vietnam	50%	57%	81%	88%	1.8x

■ 2 Lowest Trust Gaps
■ 2 Highest Trust Gaps

CX and Recommend Connections – by Country

KEY TAKEAWAYS

- + Chinese and Indian consumers' propensity to recommend increases the least after a 5-star experience compared to after a 1-2-star experience; they also are most likely to recommend after a 1-2-star experience.
- + Filipino and Emirate consumers are most likely to recommend after a 5-star experience, while Korean and Japanese consumers are least likely to trust after rating an experience as such.
- + French consumers' likelihood to recommend increases the most after a 5-star experience compared to after a 1-2-star experience, while Chinese consumers' trust increases the least.

ABOUT

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

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

	1-2 stars	3 stars	4 stars	5 stars	5 stars vs 1-2 stars
Argentina	29%	49%	76%	86%	3.0x
Australia	25%	41%	72%	88%	3.5x
Belgium	21%	44%	71%	85%	4.1x
Brazil	33%	57%	80%	86%	2.6x
Canada	21%	41%	71%	82%	3.9x
China	70%	74%	81%	85%	1.2x
Colombia	32%	58%	80%	87%	2.7x
France	19%	48%	76%	88%	4.6x
Germany	20%	36%	63%	82%	4.0x
Hong Kong	40%	49%	74%	85%	2.1x
India	52%	72%	86%	84%	1.6x
Indonesia	23%	47%	77%	89%	3.9x
Italy	20%	45%	74%	85%	4.4x
Japan	20%	18%	43%	55%	2.7x
Malaysia	21%	52%	80%	87%	4.1x
Mexico	38%	59%	80%	86%	2.3x
Netherlands	20%	37%	65%	80%	4.0x
New Zealand	24%	39%	67%	84%	3.5x
Philippines	36%	64%	86%	92%	2.5x
Singapore	30%	52%	79%	88%	3.0x
South Africa	31%	63%	80%	90%	2.9x
South Korea	29%	38%	65%	79%	2.8x
Spain	20%	41%	73%	85%	4.2x
Taiwan	34%	51%	75%	89%	2.6x
Thailand	32%	58%	84%	89%	2.8x
UK	20%	43%	72%	82%	4.2x
UAE	40%	66%	86%	92%	2.3x
US	22%	41%	72%	82%	3.7x
Vietnam	50%	59%	80%	87%	1.7x

■ 2 Lowest Trust Gaps
■ 2 Highest Trust Gaps

CX and Purchase More Connections – by Country

KEY TAKEAWAYS

- + Chinese and Hong Kong consumers' likelihood to purchase more increases the least after a 5- star experience compared to after a 1-2-star experience; Chinese consumers also are most likely to purchase more after a 1-2-star experience.
- + South Korean and Taiwanese consumers are most likely to trust after a 5-star experience, while Japanese and Dutch consumers are least likely to trust after rating an experience as such.
- + Indonesian consumers' likelihood to purchase more increases the most after a 5-star experience compared to after a 1-2- star experience, while Chinese consumers' trust increases the least.

ABOUT

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

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

■ 2 Lowest Trust Gaps
■ 2 Highest Trust Gaps

	1-2 stars	3 stars	4 stars	5 stars	5 stars vs 1-2 stars
Argentina	40%	56%	74%	79%	2.0x
Australia	41%	55%	74%	83%	2.0x
Belgium	34%	53%	68%	75%	2.2x
Brazil	40%	62%	79%	82%	2.1x
Canada	35%	49%	72%	78%	2.3x
China	64%	71%	81%	85%	1.3x
Colombia	41%	62%	76%	78%	1.9x
France	38%	64%	84%	88%	2.3x
Germany	18%	33%	47%	58%	3.2x
Hong Kong	53%	72%	87%	90%	1.7x
India	47%	64%	85%	81%	1.7x
Indonesia	22%	48%	71%	81%	3.7x
Italy	21%	42%	64%	76%	3.7x
Japan	20%	24%	40%	45%	2.2x
Malaysia	24%	52%	78%	82%	3.4x
Mexico	38%	62%	74%	78%	2.0x
Netherlands	27%	36%	49%	59%	2.1x
New Zealand	38%	55%	69%	79%	2.1x
Philippines	33%	63%	85%	88%	2.7x
Singapore	35%	56%	74%	82%	2.4x
South Africa	38%	63%	81%	85%	2.2x
South Korea	50%	63%	84%	91%	1.8x
Spain	33%	50%	69%	76%	2.3x
Taiwan	54%	72%	89%	92%	1.7x
Thailand	28%	49%	77%	81%	2.9x
UK	28%	54%	72%	77%	2.7x
UAE	42%	63%	83%	88%	2.1x
US	29%	55%	72%	76%	2.6x
Vietnam	44%	54%	77%	88%	2.0x

Base: 33,093 consumers across 29 countries

Source: Qualtrics XM Institute Q3 2022 Global Consumer Trends Study

www.xminstitute.com

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DATA CALCULATION

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

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

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

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

In **Figures 8-29**, the percentages in each chart come from the corresponding tables in Figures 5, 6, and 7. Key Takeaways for purchasing more were calculated by dividing the percentage of consumers who gave a 5-star satisfaction rating by the percentage who gave a 1- or 2-star rating.

In **Figures 29-31**, we calculated the percentages for each of the three loyalty behaviors by first totaling the number of responses from each country that indicated consumers were either 'somewhat' or 'very' likely to trust, recommend, or purchase more from an organization in a given industry. For each of those three loyalty behaviors, we then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same industry as 1 or 2 stars, 3 stars, 4 stars, or 5 stars.

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