



DATA SNAPSHOT

Global Study: Consumer Satisfaction and Loyalty, 2024

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of Qualtrics XM Institute's 2023 Global Consumer Study, we asked more than 28,000 consumers from 26 countries to evaluate their recent experiences with companies across 20 industries. Participants rated their satisfaction with these interactions on a scale of 1-5 stars and then told us how likely they are to trust, recommend, and purchase more from the company following that experience. To understand year-over-year changes in customer sentiment, we compared these results to our findings in the Q3 2022 Global Consumer Study. We found that:

- + **Consumer satisfaction decreased – slightly.** On average, global consumer satisfaction decreased by 0.6 percentage points since last year. Argentinian and Singaporean consumer satisfaction rates increased the most, improving by 5.2 and 5.1 percentage points, respectively. Meanwhile, Thai consumer satisfaction dropped 11 percentage points on average, the most dramatic decrease of any country. India had the highest consumer satisfaction in 2022, but it fell by 9.3 percentage points in the past year, knocking it out of the top spot.
- + **Global consumer loyalty remains strong.** Compared to last year, consumers overall are slightly more likely to both trust (+1.5 percentage points) and recommend organizations across industries to their friends and family (+1.9 percentage points). Loyalty increased the most among consumers in New Zealand, while industries in Thailand experienced a 5+ percentage-point decrease in consumer trust and advocacy.
- + **Likelihood to repurchase increased for all industries.** On average across all countries, consumers' likelihood to purchase more from an organization increased for all 20 industries included in this study. This loyalty metric improved the most for banks, going up 4.3 percentage points on average, and the least for electronics makers, who only saw a bump of 0.4 percentage points.
- + **Airlines enjoyed the greatest gains in consumer loyalty.** Of the 20 industries, airlines saw the most substantial improvements in consumer trust (+4.0 percentage points) and advocacy (+3.5 percentage points) and the second-highest increase in consumer likelihood to rebuy (+4.3 percentage points). Consumer satisfaction with this industry also increased by 1.0 percentage points, the third highest after supermarkets and public utilities.

STUDY KEY FACTS

- Global consumer study
- Online panel
- Conducted in Q3 of 2023
- 26 countries
- 20 industries
- 28,400 consumers

Global Study: Customer Experience Trends, 2023

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2023. Using an online survey, XM Institute collected data from 28,400 consumers across 26 countries/regions: Argentina, Australia, Brazil, Canada, China, Colombia, Finland, France, Germany, Hong Kong (China), India, Indonesia, Italy, Japan, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Korea, Spain, Sweden, Thailand, the United Arab Emirates, the United Kingdom, and the United States.

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: 400. Finland & New Zealand: 600. Singapore and the UAE: 800.

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Consumer Satisfaction Levels by Country

KEY TAKEAWAYS

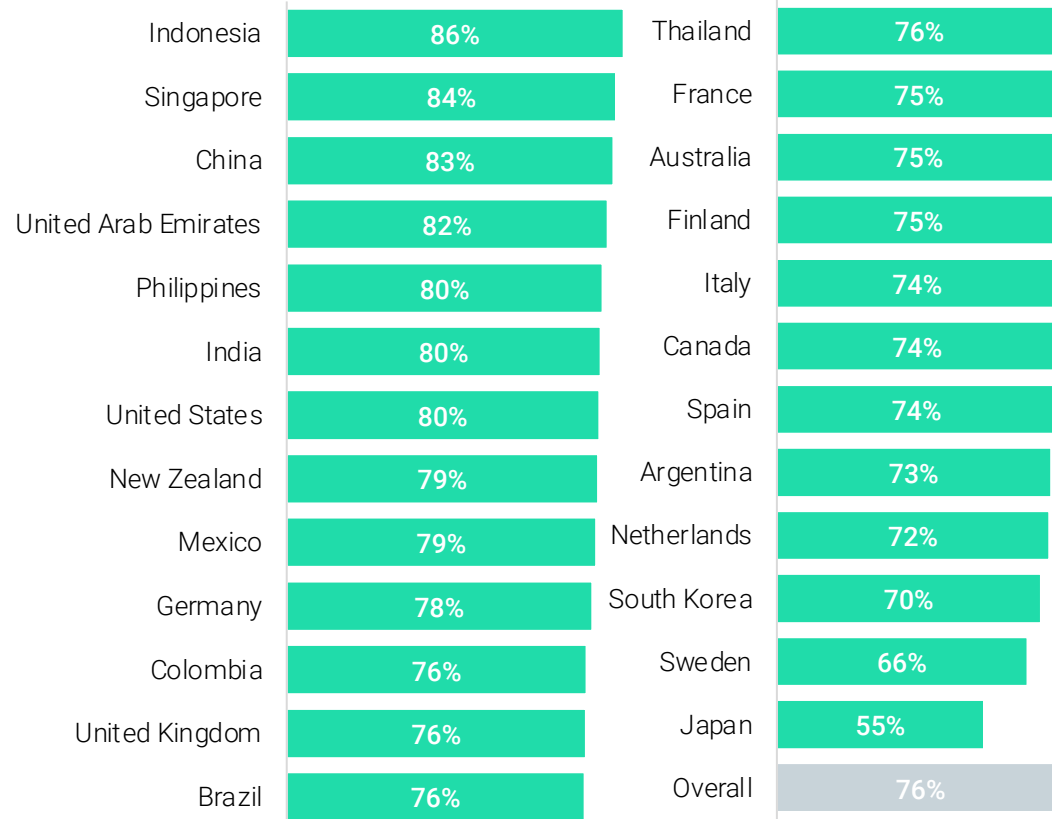
- + On average across all countries and industries surveyed, consumers were satisfied with 76% of their recent experiences.
- + Indonesian consumers were most satisfied with their recent experiences (86%), while Japanese consumers reported the least satisfaction with their recent experiences (55%).

ABOUT

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

Hong Kong (China) is not included in this chart due to the low number of industries that qualified for reporting.

Average level of SATISFACTION across industries
(Percentage giving a 4- or 5- stars out of 1 - 5-star satisfaction ratings)

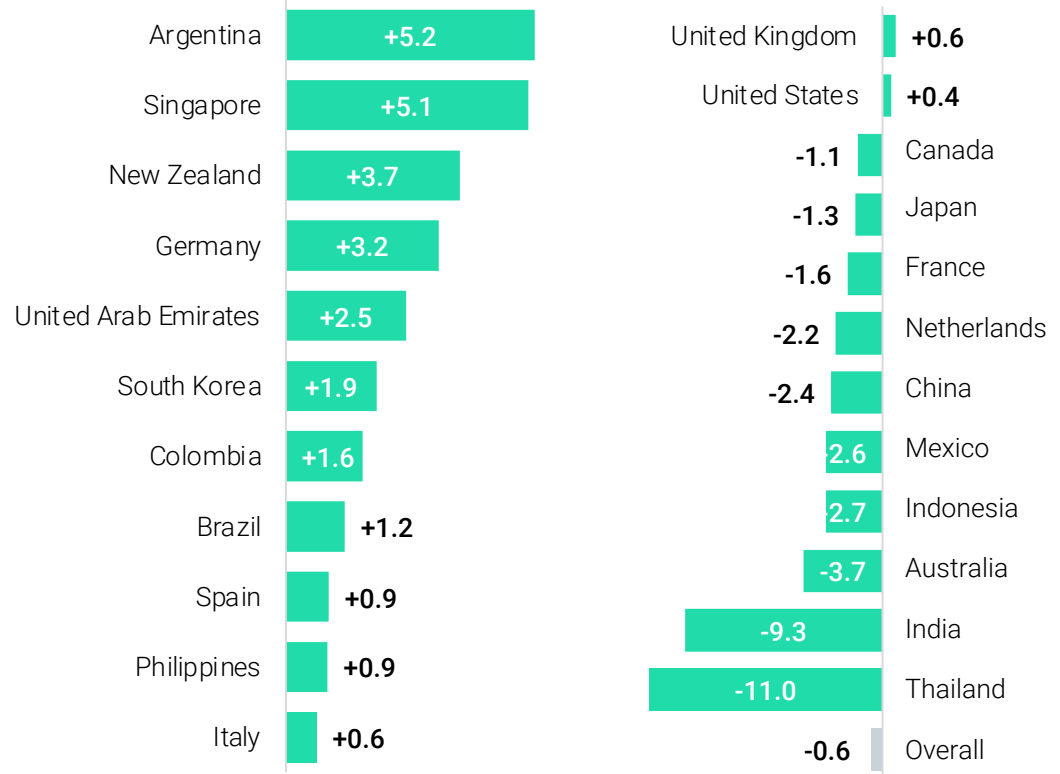


Consumer Satisfaction Level YoY Change by Country

KEY TAKEAWAYS

- + Overall, consumers were -0.6 percentage points less satisfied with their recent experiences this year compared to last year.
- + Thirteen of the 23 countries we studied experienced year-over-year increases in satisfaction, while ten experienced year-over-year decreases in consumer satisfaction.
- + Argentinian consumers' satisfaction levels increased the most compared to their 2023 satisfaction levels (+5.2 % points), while Thai consumers' satisfaction decreased the most (-11 % points).

Year-over-Year Change in Consumer Satisfaction
(Percentage-point change from 2023 consumer satisfaction levels to 2024)



ABOUT

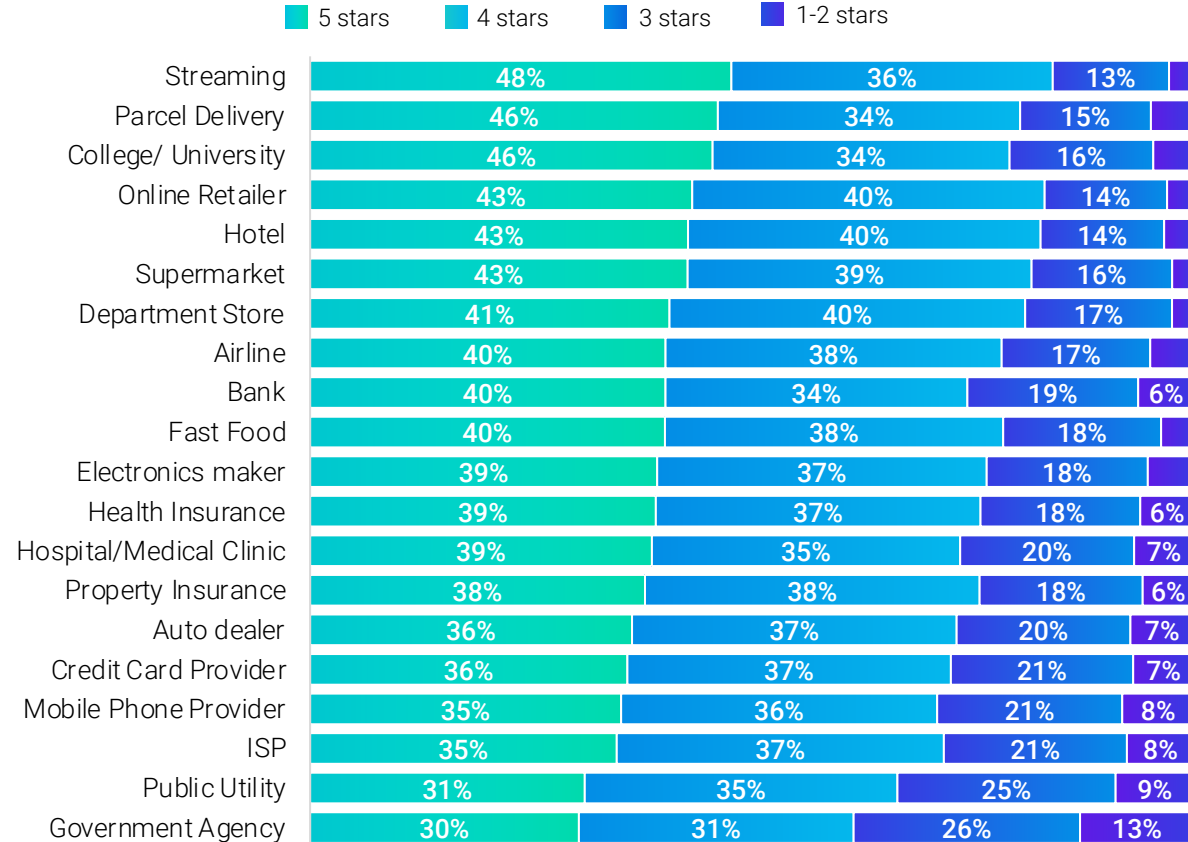
This chart shows the year-over-year change in consumer satisfaction (4 or 5 stars) in each country, across all industries. Data is only reported for the 23 countries and industries for which we collected data in both 2023 and 2022.

Consumer Satisfaction Levels by Industry

KEY TAKEAWAYS

- + Across all countries, consumers were most frequently highly satisfied with their streaming experiences (48%), and least frequently with their government agency experiences (30%).
- + Consumers were most dissatisfied with their recent experiences with government agencies (13%) and public utilities (9%).

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



ABOUT

This chart shows how consumers from each surveyed country rate their satisfaction levels with the organizations they recently interacted with. Data is reported and is included in 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 Satisfaction Level YoY Change by Industry

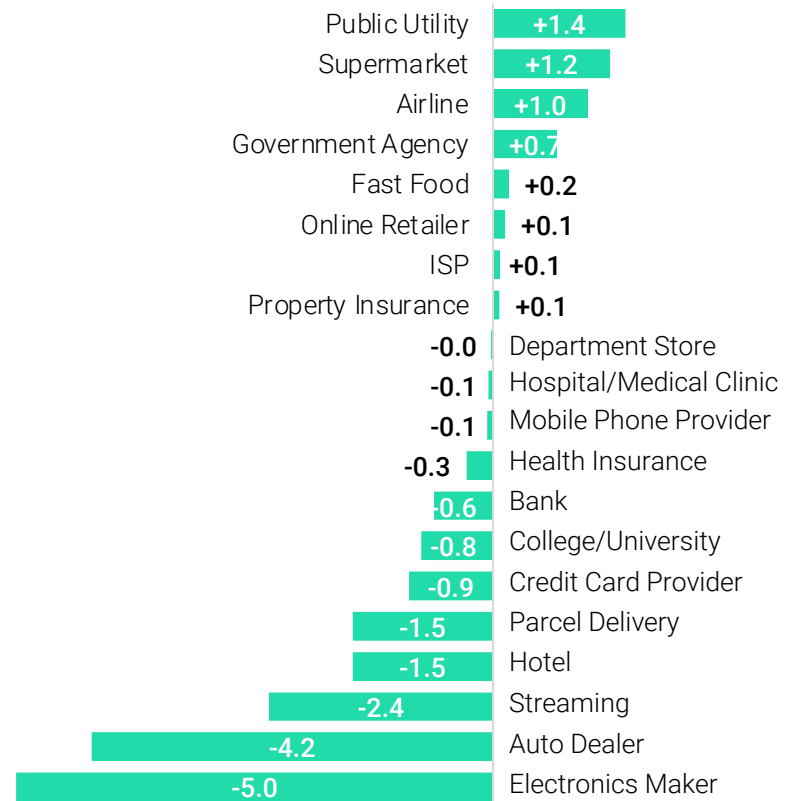
KEY TAKEAWAYS

- + Across all countries, consumers' satisfaction increased the most from last year with public utilities (1.4 % pts) and supermarkets (1.2 % pts).
- + Consumer satisfaction increased year-over-year among eight of twenty industries we studied and decreased among eleven industries.
- + Auto dealers and electronics makers received the largest decrease in satisfaction ratings from consumers compared to last year, at -4.2 % pts and -5.0 % pts, respectively.

ABOUT

This chart shows the year-over-year change in consumer satisfaction (4 or 5 stars) for each industry, across all countries. Data is only reported for the 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Year-over-Year Change in Consumer Satisfaction
(Percentage-point change from 2023 consumer satisfaction levels to 2024)



Consumer Satisfaction By Country/Region 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 and fast food.
- + Electronics makers received their lowest satisfaction ratings from their Swedish consumers (58%).

Consumers who are satisfied with their most recent experience

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	76%	80%	76%	75%	72%
Australia	82%	75%	86%	75%	82%
Brazil	83%	84%	89%	83%	88%
Canada	81%	79%	88%	N/A	81%
Colombia	86%	86%	77%	84%	88%
China	78%	78%	82%	83%	85%
Finland	83%	75%	76%	N/A	76%
France	80%	73%	86%	79%	83%
Germany	79%	78%	86%	77%	86%
Hong Kong (China)	86%	85%	N/A	N/A	N/A
India	79%	82%	85%	78%	81%
Indonesia	89%	90%	87%	84%	92%
Italy	82%	80%	90%	81%	83%
Japan	60%	50%	62%	N/A	57%
Mexico	87%	86%	85%	77%	90%
Netherlands	76%	69%	84%	73%	78%
New Zealand	88%	80%	86%	N/A	80%
Philippines	85%	88%	83%	76%	88%
Singapore	84%	85%	86%	87%	85%
South Korea	74%	76%	74%	67%	73%
Spain	81%	77%	85%	69%	86%
Sweden	71%	58%	70%	58%	73%
Thailand	81%	82%	81%	64%	88%
United States	81%	82%	88%	N/A	92%
United Kingdom	79%	80%	87%	N/A	87%
United Arab Emirates	85%	82%	79%	79%	89%

ABOUT

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

Consumer Satisfaction By Country/Region 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%).
- + Singaporean consumers reported the highest levels of satisfaction with their credit card and internet service providers, while Indonesian consumers were most satisfied with their bank and mobile phone provider experiences.

Consumers who are satisfied with their most recent experience

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	69%	70%	62%	59%	85%
Australia	71%	70%	70%	68%	82%
Brazil	78%	70%	57%	74%	91%
Canada	76%	77%	70%	73%	86%
Colombia	69%	68%	65%	65%	83%
China	85%	82%	84%	85%	85%
Finland	72%	76%	67%	73%	80%
France	73%	68%	66%	60%	88%
Germany	78%	80%	75%	75%	84%
Hong Kong (China)	85%	78%	N/A	N/A	N/A
India	77%	75%	82%	82%	86%
Indonesia	93%	79%	85%	83%	90%
Italy	70%	72%	62%	73%	85%
Japan	40%	50%	48%	49%	66%
Mexico	79%	71%	75%	76%	88%
Netherlands	70%	70%	69%	72%	75%
New Zealand	83%	80%	77%	66%	86%
Philippines	85%	75%	78%	68%	86%
Singapore	82%	85%	81%	86%	82%
South Korea	70%	71%	66%	71%	80%
Spain	63%	67%	72%	71%	87%
Sweden	68%	62%	63%	65%	77%
Thailand	83%	69%	74%	73%	76%
United States	84%	78%	80%	77%	87%
United Kingdom	84%	78%	77%	69%	84%
United Arab Emirates	85%	74%	77%	70%	88%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

ABOUT

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

Consumer Satisfaction By Country/Region and Industry (Part 3)

KEY TAKEAWAYS

- + Indonesian consumers found the highest level of satisfaction with their airline, hotel, and parcel delivery experiences while Japanese consumers reported the least satisfaction with these industries.
- + Swedish consumers were least satisfied with their most recent auto dealer experience (60%), while Singaporean consumers enjoyed the highest level of satisfaction with auto dealers (87%).

Consumers who are satisfied with their most recent experience

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	78%	78%	68%	85%	78%
Australia	71%	83%	80%	78%	72%
Brazil	82%	81%	77%	87%	N/A
Canada	67%	76%	72%	79%	69%
Colombia	78%	87%	79%	82%	77%
China	89%	82%	86%	85%	83%
Finland	71%	89%	N/A	83%	N/A
France	74%	84%	78%	82%	72%
Germany	78%	82%	74%	74%	77%
Hong Kong (China)	87%	N/A	N/A	N/A	N/A
India	89%	84%	73%	82%	83%
Indonesia	91%	91%	84%	90%	78%
Italy	78%	82%	68%	84%	82%
Japan	61%	64%	63%	56%	57%
Mexico	82%	89%	67%	86%	N/A
Netherlands	72%	78%	70%	65%	72%
New Zealand	77%	80%	75%	85%	86%
Philippines	82%	89%	N/A	88%	77%
Singapore	84%	83%	87%	84%	85%
South Korea	75%	76%	61%	82%	55%
Spain	76%	85%	71%	83%	63%
Sweden	68%	83%	60%	76%	N/A
Thailand	83%	77%	64%	76%	78%
United States	76%	87%	72%	86%	76%
United Kingdom	73%	87%	71%	78%	75%
United Arab Emirates	85%	84%	82%	78%	84%

ABOUT

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

Consumer Satisfaction By Country/Region and Industry (Part 4)

KEY TAKEAWAYS

- + Emirati consumers are most satisfied with their recent experiences with colleges/universities and government agencies, while Italian and Brazilian consumers are least satisfied with these industries, respectively.
- + Indian consumers rated their recent experience with health insurers highest, while Indonesian consumers did so for hospitals/medical clinics.

Consumers who are satisfied with their most recent experience

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	80%	64%	54%	73%	67%
Australia	77%	61%	62%	74%	81%
Brazil	73%	43%	64%	67%	69%
Canada	73%	50%	71%	70%	73%
Colombia	85%	57%	68%	73%	70%
China	83%	83%	86%	83%	75%
Finland	N/A	65%	72%		68%
France	74%	75%	64%	72%	74%
Germany	76%	74%	67%	78%	75%
Hong Kong (China)	N/A	N/A	N/A	N/A	N/A
India	78%	69%	71%	84%	78%
Indonesia	86%	69%	84%	84%	87%
Italy	68%	49%	53%	79%	68%
Japan	N/A	N/A	40%	55%	55%
Mexico	85%	44%	77%	80%	75%
Netherlands	75%	62%	62%	70%	79%
New Zealand	78%	66%		74%	80%
Philippines	80%	61%	78%	82%	78%
Singapore	87%	82%	83%	77%	82%
South Korea	70%	50%	59%	70%	77%
Spain	75%	61%	59%	73%	76%
Sweden	76%	46%	58%	61%	68%
Thailand	83%	54%	73%	76%	76%
United States	76%	58%	73%	76%	81%
United Kingdom	74%	60%	56%	73%	74%
United Arab Emirates	88%	86%	74%	82%	83%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

ABOUT

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

Consumer Trust Levels by Country

KEY TAKEAWAYS

- + On average across all countries and industries surveyed, consumers said they were likely to trust an organization after 75% of their recent experiences.
- + Consumers in the UAE were, on average, most likely to trust after recent experiences (87%), while Swedish consumers reported the least propensity to trust their recent experiences (65%).

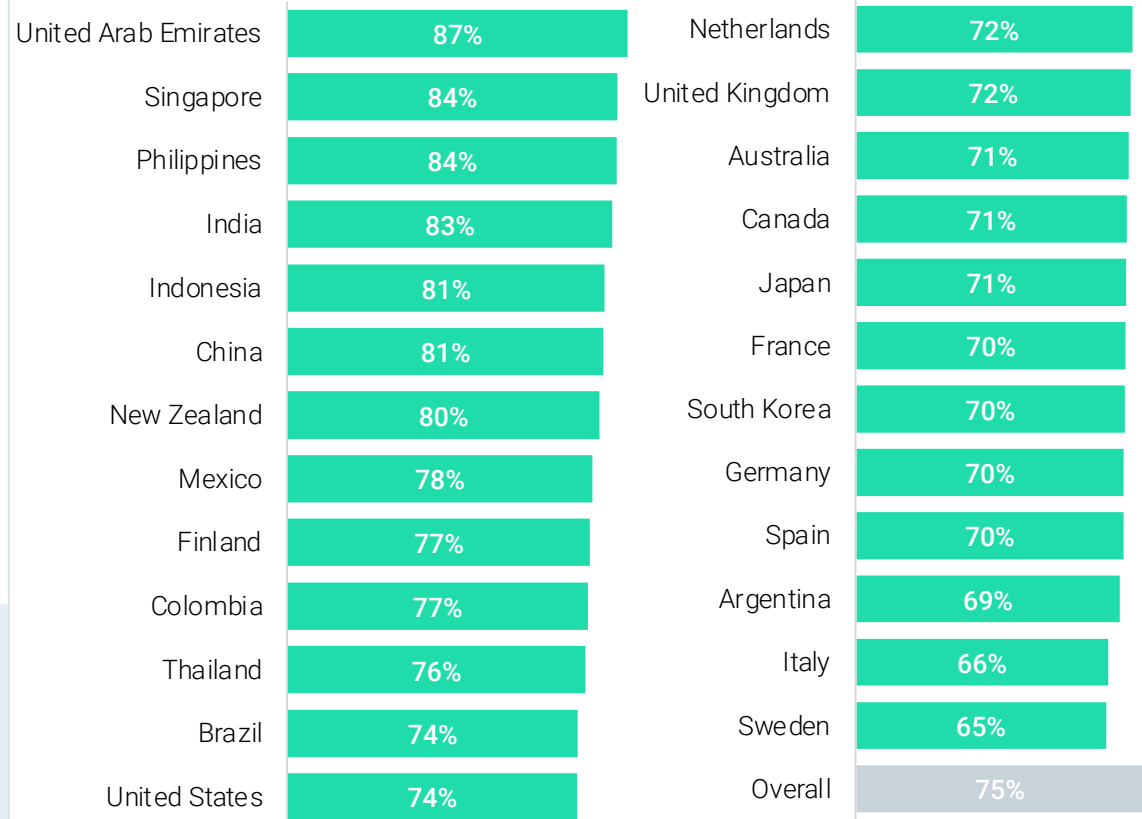
ABOUT

This chart shows how consumers from each surveyed country rate their likelihood to trust the organizations they recently interacted with.

Hong Kong (China) is not included in this chart due to the low number of industries that qualified for reporting.

Average level of TRUST across industries

(Percentage somewhat or extremely likely)



Consumer Trust Level YoY Change by Country

KEY TAKEAWAYS

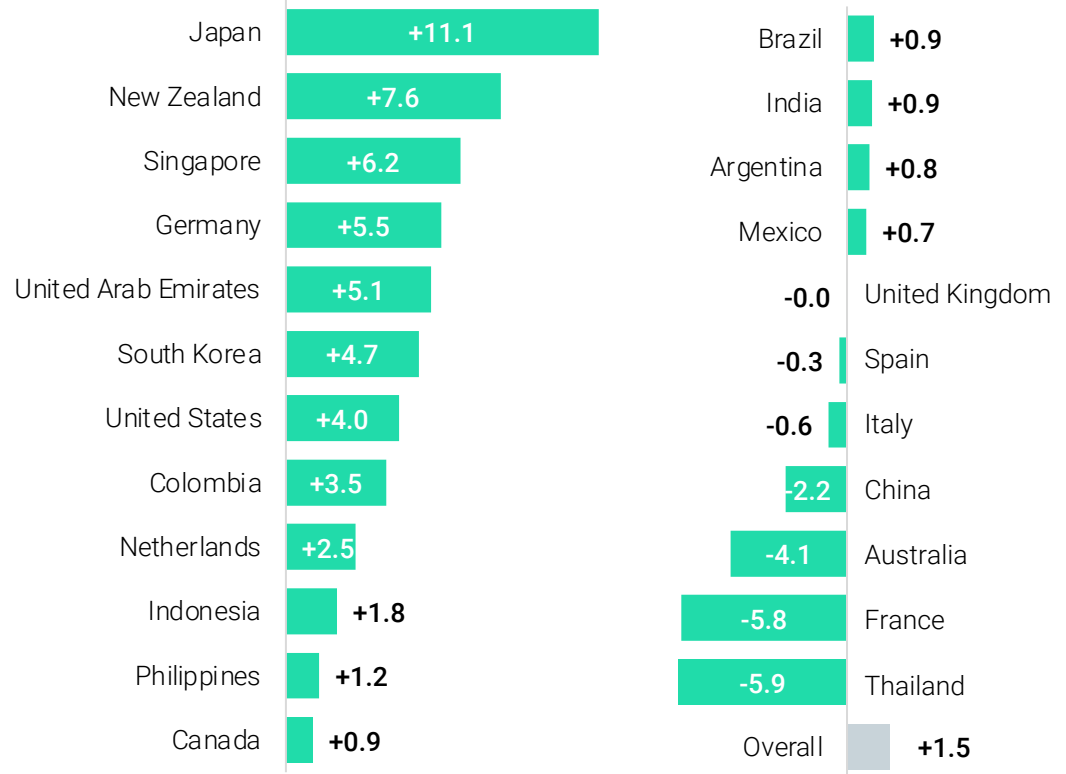
- + Overall, consumers were +1.5 % pts more likely to trust after their recent experiences this year compared to last year.
- + Sixteen of the 23 countries we studied experienced year-over-year increases in consumer trust. Six of 23 experienced decreases year-over-year in consumer trust.
- + Japanese consumers' likelihood to trust increased the most compared to their 2023 satisfaction levels (+11.1 % points), while Thai consumers' satisfaction decreased the most (-5.9 % points).

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 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Year-over-Year Change in Consumer Trust

(Percentage-point change from 2023 consumer satisfaction levels to 2024)

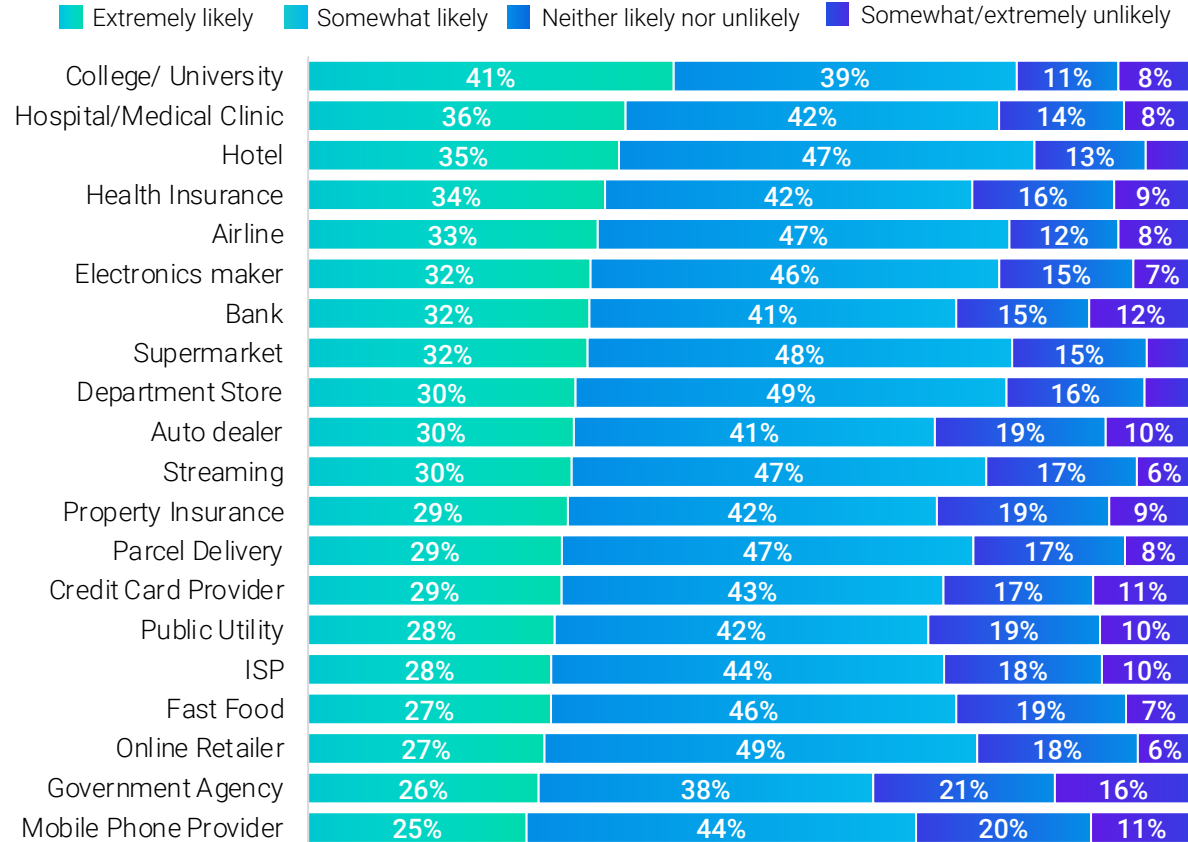


Consumer Trust Levels by Industry

KEY TAKEAWAYS

- + Across all countries, consumers were most frequently extremely likely to trust their college/university experiences (41%), and least frequently trust their mobile phone provider experiences (30%).
- + Consumers have the least likelihood to trust their recent experiences with government agencies (16%) and banks (12%).

How likely are you to TRUST these organizations?



ABOUT

This chart shows how consumers from each surveyed country rate their likelihood to trust the organizations they recently interacted with. 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 Trust Level YoY Change by Industry

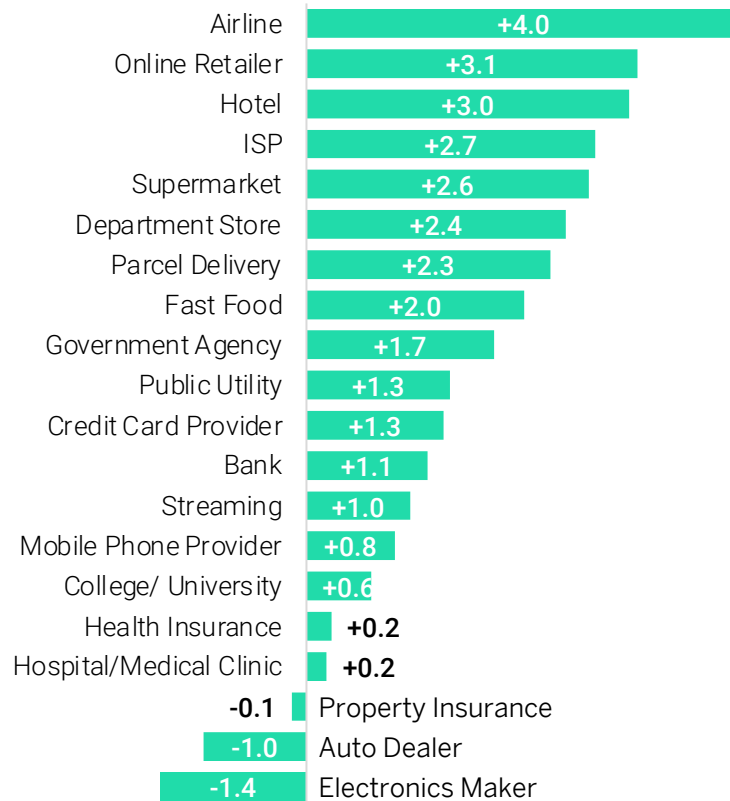
KEY TAKEAWAYS

- + Across all countries, consumers' likelihood to trust increased the most from last year with airlines (4.0 % pts).
- + Seventeen of 20 industries experienced a year-over-year increase in consumer trust, while just three industries experienced a decrease year-over-year in consumer trust.
- + Electronics makers and auto dealers received the largest decrease in trust from consumers compared to last year, at -1.4 % pts and -1.0 % pts, respectively.

ABOUT

This chart shows the year-over-year change in consumer likelihood to trust (somewhat or extremely likely) for each industry, across all countries. Data is only reported for the 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Year-over-Year Change in Consumer Trust
(Percentage-point change from 2023 consumer trust levels to 2024)



Consumer Trust By Country/Region and Industry (Part 1)

KEY TAKEAWAYS

- + Swedish consumers are least likely to trust after their fast food, online retail, and electronics maker experiences. Japanese consumers are least likely to trust after department store and supermarket experiences.
- + Filipino consumers are most likely to trust after department store and fast food experiences.
- + Colombian consumers are most likely to trust after electronics maker experiences.

ABOUT

This table shows the percentage of respondents from each country who are *somewhat* or *extremely likely* to trust an organization in each industry. Data is reported 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 these types of organizations

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	71%	72%	70%	80%	73%
Australia	76%	72%	76%	77%	77%
Brazil	81%	81%	82%	72%	77%
Canada	75%	72%	76%	N/A	78%
Colombia	84%	83%	78%	87%	88%
China	82%	72%	76%	82%	81%
Finland	84%	76%	69%		83%
France	77%	66%	77%	70%	81%
Germany	74%	60%	70%	77%	73%
Hong Kong (China)	90%	89%	N/A	N/A	N/A
India	84%	79%	83%	85%	82%
Indonesia	85%	79%	79%	81%	84%
Italy	74%	65%	75%	78%	76%
Japan	70%	62%	68%	N/A	70%
Mexico	79%	76%	80%	82%	86%
Netherlands	76%	69%	76%	71%	80%
New Zealand	82%	77%	82%	N/A	77%
Philippines	94%	90%	78%	82%	89%
Singapore	82%	86%	78%	79%	87%
South Korea	75%	63%	66%	77%	75%
Spain	75%	68%	80%	78%	81%
Sweden	71%	56%	58%	66%	71%
Thailand	78%	75%	72%	70%	77%
United States	73%	72%	78%	N/A	86%
United Kingdom	77%	69%	83%	N/A	84%
United Arab Emirates	91%	85%	83%	83%	90%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer Trust By Country/Region and Industry (Part 2)

KEY TAKEAWAYS

- + Spanish consumers have the least propensity to trust after banking and credit card experiences, while Hong Kong consumers are most likely to trust after experiences with these organizations.
- + Emirati consumers are most likely to trust after mobile phone provider, internet service provider, and streaming media experiences.
- + Argentinian consumers are least likely to trust after their most recent internet service provider experience, at 57%.

ABOUT

This table shows the percentage of respondents from each country who said they were *somewhat* or *extremely likely* to trust an organization in each industry. Data is reported 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 these types of organizations

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	65%	62%	58%	57%	71%
Australia	64%	61%	69%	67%	74%
Brazil	72%	69%	63%	72%	79%
Canada	74%	71%	67%	71%	73%
Colombia	72%	64%	67%	67%	80%
China	88%	87%	81%	80%	79%
Finland	78%	80%	78%	73%	73%
France	69%	62%	57%	62%	82%
Germany	68%	65%	63%	75%	75%
Hong Kong (China)	93%	87%	N/A	N/A	N/A
India	84%	81%	79%	85%	84%
Indonesia	85%	75%	81%	80%	82%
Italy	52%	66%	50%	66%	77%
Japan	68%	75%	60%	64%	68%
Mexico	77%	73%	74%	80%	84%
Netherlands	73%	78%	66%	72%	74%
New Zealand	80%	80%	79%	70%	71%
Philippines	89%	82%	81%	77%	81%
Singapore	90%	84%	80%	85%	80%
South Korea	81%	69%	65%	66%	71%
Spain	49%	59%	61%	68%	77%
Sweden	70%	59%	56%	60%	69%
Thailand	78%	77%	73%	74%	80%
United States	78%	70%	73%	73%	76%
United Kingdom	76%	72%	71%	68%	72%
United Arab Emirates	90%	84%	87%	86%	88%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer Trust By Country/Region and Industry (Part 3)

KEY TAKEAWAYS

- + Canadian consumers have the least propensity to trust after airline (62%) and hotel (73%) experiences.
- + Singaporeans are most likely to trust after auto dealer experiences, while Swedes are least likely to do so.

ABOUT

This table shows the percentage of respondents from each country who said they were *somewhat* or *extremely likely* to trust an organization in each industry. Data is reported 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 these types of organizations

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	77%	82%	66%	80%	63%
Australia	72%	77%	68%	75%	68%
Brazil	82%	83%	71%	82%	N/A
Canada	61%	73%	67%	75%	60%
Colombia	79%	84%	79%	80%	81%
China	89%	78%	80%	79%	78%
Finland	74%	83%	N/A	77%	N/A
France	76%	84%	62%	77%	62%
Germany	77%	82%	66%	62%	67%
Hong Kong (China)	95%	N/A	N/A	N/A	N/A
India	90%	88%	77%	84%	81%
Indonesia	88%	84%	84%	82%	75%
Italy	68%	78%	59%	73%	58%
Japan	84%	77%	76%	71%	72%
Mexico	79%	86%	78%	82%	N/A
Netherlands	76%	82%	75%	61%	67%
New Zealand	90%	93%	84%	78%	79%
Philippines	91%	90%	N/A	82%	79%
Singapore	90%	85%	85%	78%	81%
South Korea	78%	75%	60%	78%	52%
Spain	76%	84%	71%	74%	60%
Sweden	68%	79%	51%	67%	N/A
Thailand	87%	79%	66%	68%	83%
United States	75%	85%	63%	82%	74%
United Kingdom	75%	81%	64%	70%	61%
United Arab Emirates	91%	87%	85%	89%	87%

Consumer Trust By Country/Region and Industry (Part 4)

KEY TAKEAWAYS

- + Singaporean consumers are most likely to trust after their most recent government agency, public utility, and hospital/medical clinic experiences.
- + Mexicans are least likely to trust after their most recent government agency experience, while Italians are least likely to do so after their most recent public utility and health insurer experiences.

Consumers who are likely to trust these types of organizations

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	80%	52%	59%	67%	71%
Australia	74%	60%	62%	69%	85%
Brazil	74%	52%	71%	72%	75%
Canada	76%	56%	70%	66%	83%
Colombia	85%	65%	69%	72%	73%
China	87%	76%	88%	77%	78%
Finland	N/A	75%	82%	N/A	77%
France	75%	60%	69%	63%	78%
Germany	72%	65%	64%	73%	71%
Hong Kong (China)	N/A	N/A	N/A	N/A	N/A
India	85%	75%	85%	88%	83%
Indonesia	85%	67%	82%	85%	82%
Italy	71%	50%	52%	66%	63%
Japan	N/A	N/A	65%	73%	76%
Mexico	78%	49%	80%	80%	77%
Netherlands	76%	56%	58%	73%	85%
New Zealand	83%	72%	N/A	79%	79%
Philippines	84%	72%	84%	87%	86%
Singapore	90%	88%	92%	79%	87%
South Korea	70%	62%	67%	72%	81%
Spain	77%	61%	54%	66%	77%
Sweden	83%	59%	67%	57%	74%
Thailand	84%	67%	75%	79%	81%
United States	73%	53%	70%	74%	77%
United Kingdom	76%	57%	52%	73%	80%
United Arab Emirates	90%	87%	87%	86%	84%

ABOUT

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

Consumer Advocacy Levels by Country

KEY TAKEAWAYS

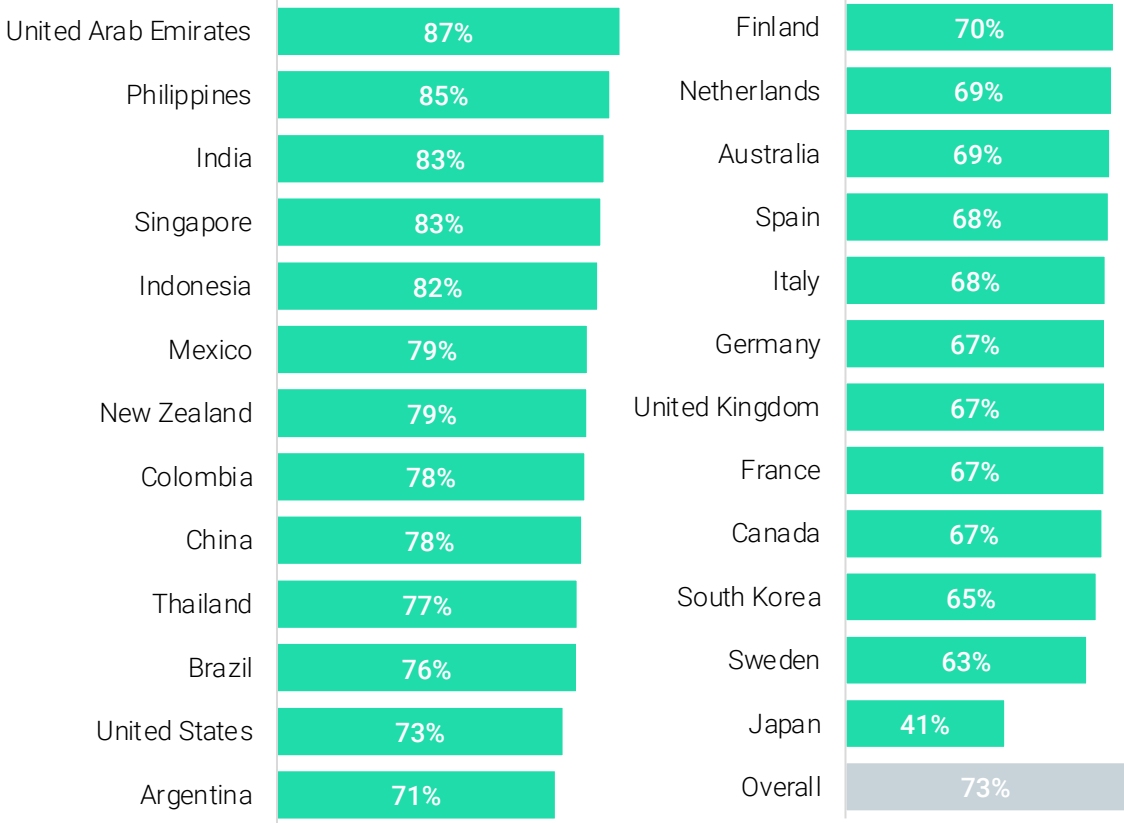
- + On average across all countries and industries surveyed, consumers said they were likely to recommend an organization after 73% of their recent experiences.
- + Consumers in the UAE were most likely to recommend a company after recent experiences (87%), while Japanese consumers reported the least propensity to recommend after their recent experiences (41%).

ABOUT

This chart shows how consumers from each surveyed country rate their likelihood to recommend the organizations they recently interacted with.

Hong Kong (China) is not included in this chart due to the low number of industries that qualified for reporting.

Average likelihood to RECOMMEND to friends and family across industries
(Percentage somewhat or extremely likely)



Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer Advocacy Level YoY Change by Country

KEY TAKEAWAYS

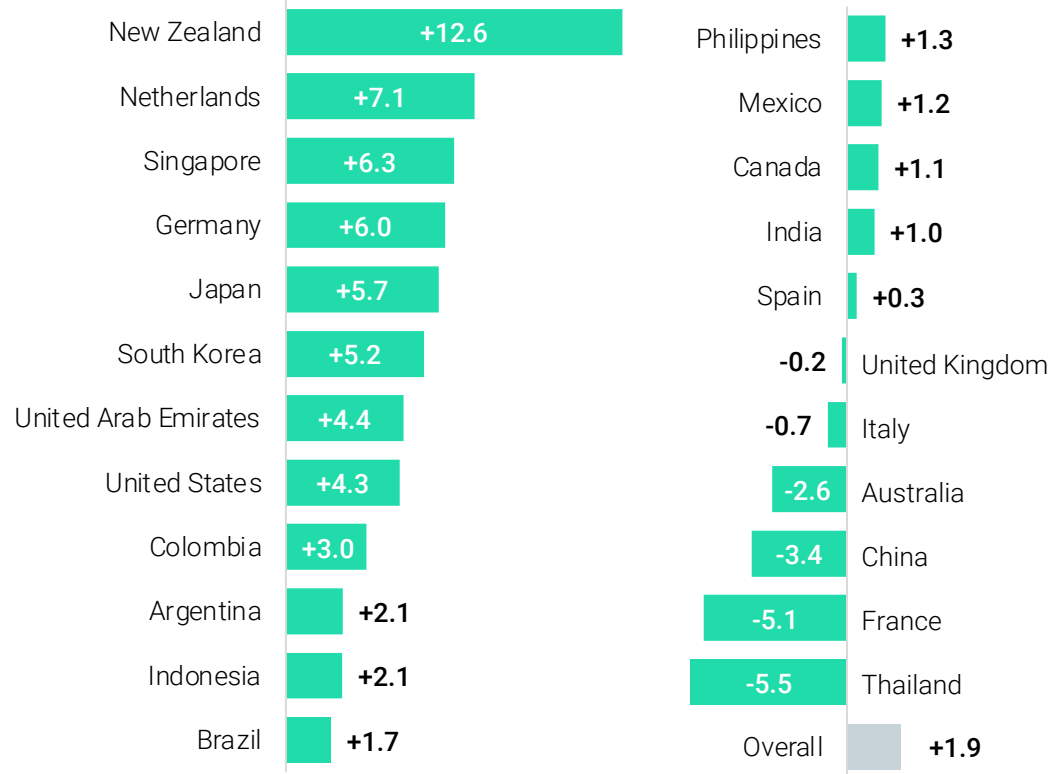
- + Overall, consumers were +1.9 % pts more likely to recommend after their recent experiences this year compared to last year.
- + Seventeen of 23 countries experienced a year-over-year increase in consumer advocacy, while six experienced a year-over-year decrease.
- + New Zealand consumers' likelihood to trust increased the most compared to their 2023 satisfaction levels (+12.6 % points), while Thai consumers' satisfaction decreased the most (-5.5 % points).

ABOUT

This chart shows the year-over-year change in consumer likelihood to recommend (*somewhat or extremely likely*) in each country, across all industries. Data is only reported for the 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Year-over-Year Change in Consumer Advocacy

(Percentage-point change from 2023 consumer satisfaction levels to 2024)

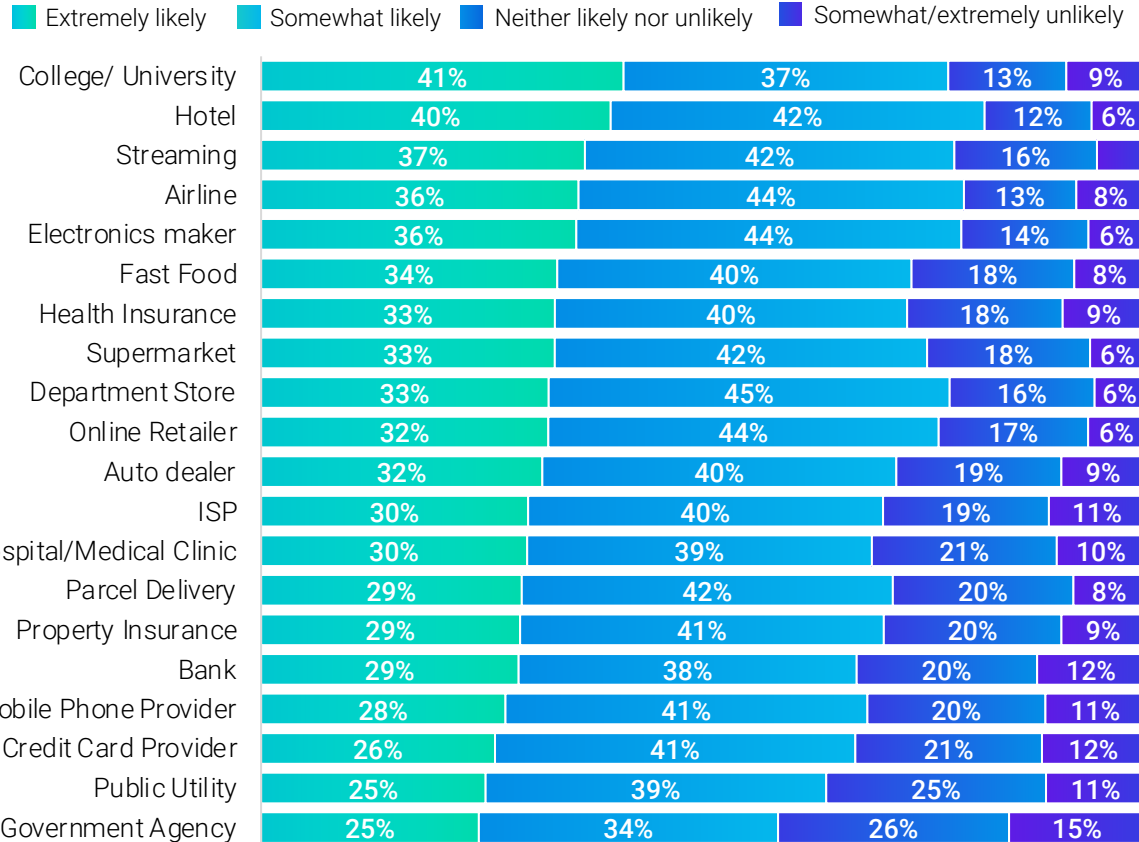


Consumer Advocacy Levels by Industry

KEY TAKEAWAYS

- + Across all countries, consumers were most frequently extremely likely to recommend their college/university experiences (41%), followed by hotels (40%). Government agencies and public utilities are least likely to receive avid word-of-mouth (25%).
- + Consumers have the least likelihood to recommend after their recent experiences with government agencies (15%), followed by banks and credit card providers (12%).

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



ABOUT

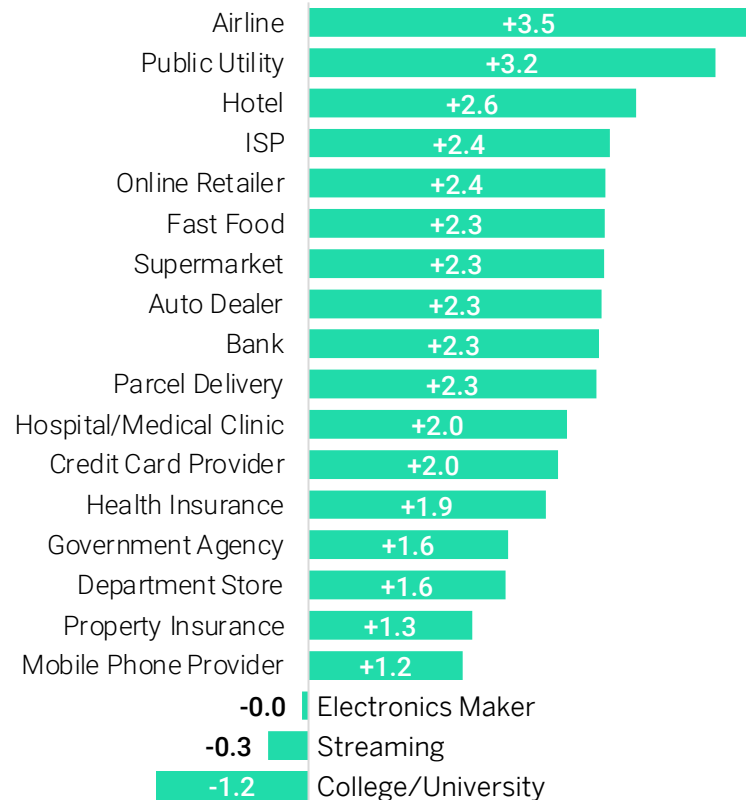
This chart shows how consumers from each surveyed country rate their likelihood to recommend the organizations they recently interacted with. Data is reported and includes the average only for countries with 100+ respondents who reported having an experience with an organization in that industry within the previous 90 days.

Consumer Advocacy Level YoY Change by Industry

KEY TAKEAWAYS

- + Across all countries, consumers' likelihood to recommend increased the most from last year with airlines (3.5 % pts).
- + Seventeen of 20 industries experienced year-over-year increases in consumer advocacy. Just three of 20 industries experienced year-over-year decreases in advocacy.
- + Colleges/universities and streaming received the largest decrease in consumer advocacy compared to last year, at -1.2 % pts and -0.3% pts, respectively.

Year-over-Year Change in Consumer Advocacy
(Percentage-point change from 2023 consumer satisfaction levels to 2024)



ABOUT

This chart shows the year-over-year change in consumer likelihood to recommend (somewhat or extremely likely) for each industry, across all countries. Data is only reported for the 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Consumer Advocacy By Country/Region and Industry (Part 1)

KEY TAKEAWAYS

- + Filipino consumers are most likely to recommend after department store and fast food experiences, while Japanese consumers are least likely to recommend after these experiences, as well as after online retail and supermarket experiences.
- + Colombian consumers are most likely to recommend after electronics maker experiences, while online retailers receive the most advocacy from Indian consumers.

Consumers who are likely to recommend these types of organizations

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	76%	79%	77%	81%	75%
Australia	78%	70%	80%	72%	75%
Brazil	82%	84%	85%	81%	83%
Canada	74%	69%	77%	N/A	70%
Colombia	86%	84%	80%	91%	89%
China	79%	73%	79%	83%	73%
Finland	77%	70%	64%	N/A	76%
France	75%	66%	77%	64%	77%
Germany	66%	60%	75%	78%	72%
Hong Kong (China)	88%	85%	N/A	N/A	N/A
India	81%	81%	88%	85%	85%
Indonesia	86%	82%	82%	83%	84%
Italy	77%	68%	80%	78%	77%
Japan	45%	40%	40%	N/A	40%
Mexico	83%	80%	81%	81%	87%
Netherlands	70%	69%	76%	73%	75%
New Zealand	79%	82%	81%	N/A	77%
Philippines	92%	90%	86%	81%	89%
Singapore	83%	85%	82%	90%	85%
South Korea	75%	64%	63%	72%	66%
Spain	75%	69%	77%	79%	74%
Sweden	68%	56%	64%	66%	68%
Thailand	77%	75%	79%	72%	80%
United States	80%	76%	80%	N/A	82%
United Kingdom	76%	72%	80%	N/A	79%
United Arab Emirates	86%	88%	82%	89%	90%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

ABOUT

This table shows the percentage of respondents from each country who are *somewhat* or *extremely likely* to recommend an organization in each industry. Data is reported 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/Region and Industry (Part 2)

KEY TAKEAWAYS

+ Emirati consumers are the most likely to recommend after experiences with all five industries, while Japanese consumers are least likely to do so. There is a 64 percentage-point gap between each country's likelihood to recommend a bank to their friends and family.

Consumers who are likely to recommend these types of organizations

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	68%	61%	63%	57%	80%
Australia	60%	57%	67%	70%	77%
Brazil	71%	71%	66%	72%	85%
Canada	65%	66%	68%	67%	78%
Colombia	70%	67%	65%	69%	80%
China	79%	79%	77%	80%	77%
Finland	69%	61%	71%	65%	71%
France	60%	55%	59%	62%	82%
Germany	60%	65%	65%	70%	72%
Hong Kong (China)	87%	84%	N/A	N/A	N/A
India	82%	82%	81%	85%	85%
Indonesia	83%	73%	83%	81%	85%
Italy	58%	66%	55%	67%	78%
Japan	27%	35%	35%	34%	46%
Mexico	80%	73%	76%	79%	85%
Netherlands	66%	74%	71%	71%	77%
New Zealand	79%	82%	75%	67%	77%
Philippines	90%	84%	82%	76%	87%
Singapore	84%	80%	77%	79%	83%
South Korea	69%	56%	60%	59%	71%
Spain	46%	56%	62%	70%	79%
Sweden	63%	52%	63%	61%	71%
Thailand	75%	74%	74%	78%	80%
United States	72%	70%	72%	69%	81%
United Kingdom	70%	61%	71%	62%	75%
United Arab Emirates	91%	86%	85%	88%	88%

ABOUT

This table shows the percentage of respondents from each country who said they were *somewhat* or *extremely likely* to recommend an organization in each industry. Data is reported 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/Region and Industry (Part 3)

KEY TAKEAWAYS

- + Japanese consumers are least likely to recommend these five organizations after their recent experiences.
- + Consumers in the Philippines are most likely to recommend after their recent hotel experiences (92%), while Brazilians are most likely to do so after a parcel delivery experience.

Consumers who are likely to recommend these types of organizations

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	77%	84%	71%	77%	62%
Australia	74%	78%	68%	68%	65%
Brazil	82%	84%	79%	86%	N/A
Canada	65%	74%	67%	65%	61%
Colombia	83%	87%	88%	80%	79%
China	86%	77%	77%	76%	75%
Finland	75%	84%	N/A	70%	N/A
France	72%	82%	62%	70%	63%
Germany	78%	78%	69%	56%	65%
Hong Kong (China)	95%	N/A	N/A	N/A	N/A
India	91%	89%	79%	84%	80%
Indonesia	89%	86%	80%	85%	77%
Italy	73%	80%	70%	75%	63%
Japan	62%	58%	53%	45%	41%
Mexico	81%	88%	81%	83%	
Netherlands	75%	81%	71%	55%	71%
New Zealand	89%	91%	88%	75%	76%
Philippines	91%	92%	N/A	84%	83%
Singapore	88%	86%	89%	79%	83%
South Korea	77%	76%	61%	68%	55%
Spain	72%	82%	71%	71%	67%
Sweden	71%	79%	57%	60%	N/A
Thailand	87%	81%	70%	71%	79%
United States	75%	84%	67%	77%	73%
United Kingdom	74%	78%	61%	64%	64%
United Arab Emirates	92%	89%	85%	86%	89%

ABOUT

This table shows the percentage of respondents from each country who said they were *somewhat* or *extremely likely* to recommend an organization in each industry. Data is reported 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/Region and Industry (Part 4)

KEY TAKEAWAYS

- + Emirati consumers are the most likely to recommend colleges/universities, government agencies, public utilities, and hospitals/medical clinics to their friends and family.
- + South Koreans are the least likely to recommend colleges/universities (65%), while Swedes are least likely to recommend government agencies (42%).

ABOUT

This table shows the percentage of respondents from each country who said they were *somewhat* or *extremely likely* to recommend an organization in each industry. Data is reported 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 these types of organizations

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	80%	52%	56%	71%	71%
Australia	69%	51%	53%	66%	78%
Brazil	76%	49%	69%	70%	73%
Canada	73%	42%	60%	58%	69%
Colombia	87%	64%	67%	78%	76%
China	79%	69%	83%	80%	75%
Finland	N/A	61%	68%	N/A	64%
France	70%	54%	65%	59%	69%
Germany	71%	63%	58%	65%	59%
Hong Kong (China)	N/A	N/A	N/A	N/A	N/A
India	79%	76%	84%	88%	81%
Indonesia	85%	67%	79%	85%	81%
Italy	65%	51%	50%	63%	57%
Japan	N/A	N/A	27%	39%	38%
Mexico	80%	48%	78%	84%	75%
Netherlands	72%	47%	55%	66%	69%
New Zealand	83%	65%	N/A	82%	72%
Philippines	84%	72%	84%	83%	83%
Singapore	76%	81%	82%	78%	81%
South Korea	65%	49%	57%	71%	70%
Spain	71%	57%	55%	62%	70%
Sweden	76%	42%	48%	61%	66%
Thailand	83%	63%	74%	80%	78%
United States	70%	49%	64%	70%	74%
United Kingdom	72%	43%	44%	70%	64%
United Arab Emirates	90%	88%	88%	83%	86%

Consumer Rebuying Levels by Country

KEY TAKEAWAYS

- + On average across all countries and industries surveyed, consumers said they were likely to purchase more from an organization after 71% of experiences.
- + Consumers in the UAE were, on average, most likely to say they will purchase more from an organization after recent experiences (87%), while Japanese consumers reported the least propensity to purchase more after their recent experiences (40%).

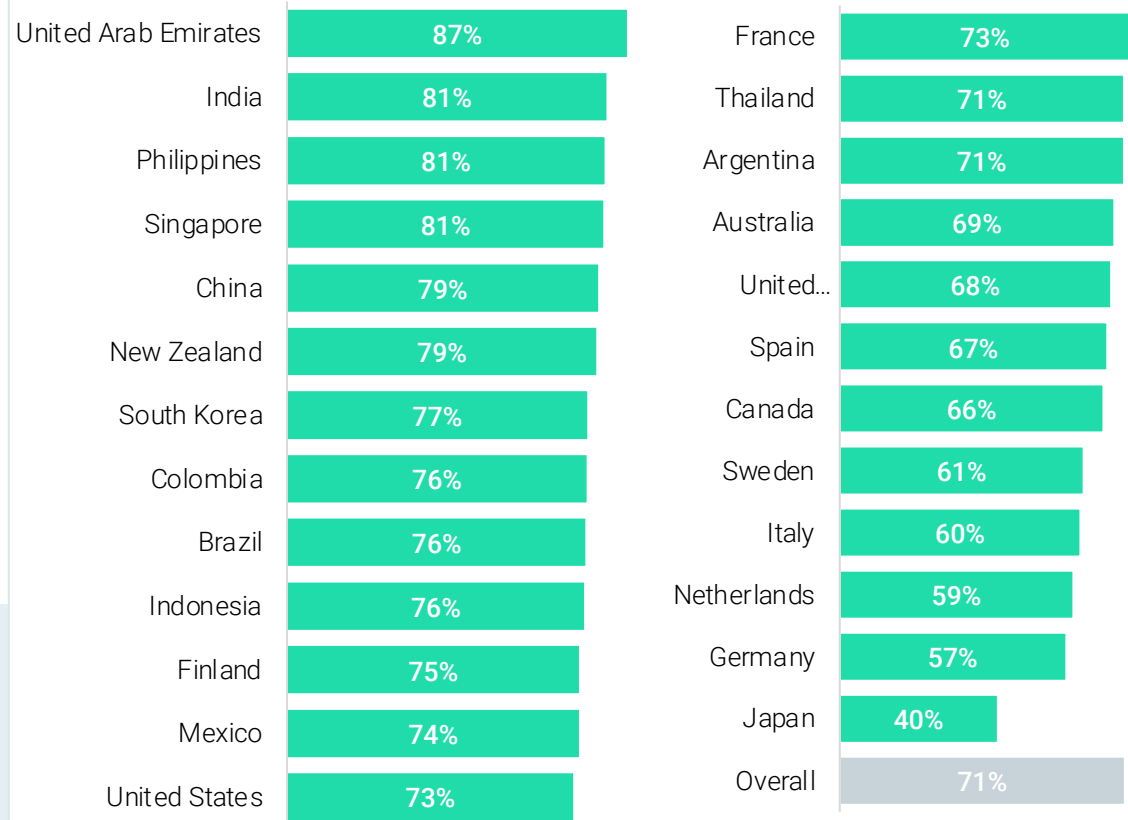
ABOUT

This chart shows how consumers from each surveyed country rate their likelihood to purchase more from the organizations they recently interacted with.

Hong Kong (China) is not included in this chart due to the low number of industries that qualified for reporting.

Average likelihood to PURCHASE MORE across industries

(Percentage somewhat or extremely likely)



Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer Rebuying Level YoY Change by Country

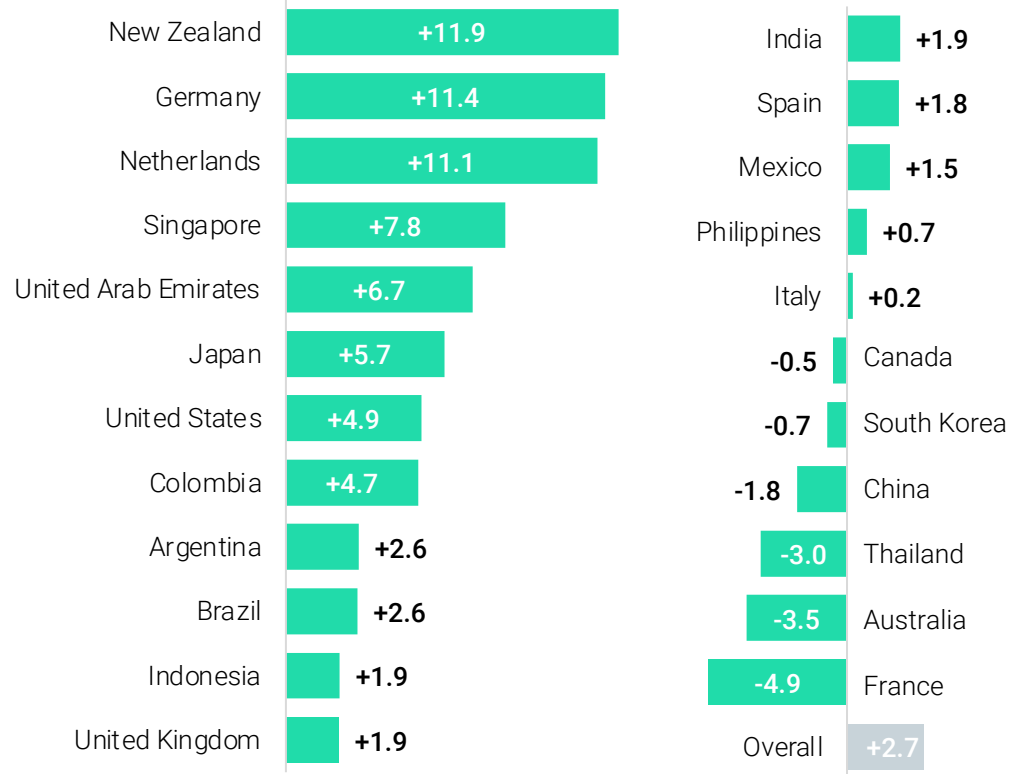
KEY TAKEAWAYS

- + Overall, consumers were +2.7 % pts more likely to purchase more after their recent experiences this year compared to last year.
- + Seventeen of 23 countries experienced year-over-year increases in consumer likelihood to purchase more. Six of 23 experienced year-over-year decreases in consumer repurchasing.
- + New Zealand consumers' likelihood to purchase more increased the most compared to their 2023 levels (+11.9 % points), while French consumers' likelihood to rebuy decreased the most (-4.9 % points).

ABOUT

This chart shows the year-over-year change in consumer likelihood to purchase more (*somewhat* or *extremely likely*) in each country, across all industries. Data is only reported for the 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Year-over-Year Change in Consumer Rebuying
(Percentage-point change from 2023 consumer likelihood to purchase more levels to 2024)



Consumer Rebuying Levels by Industry

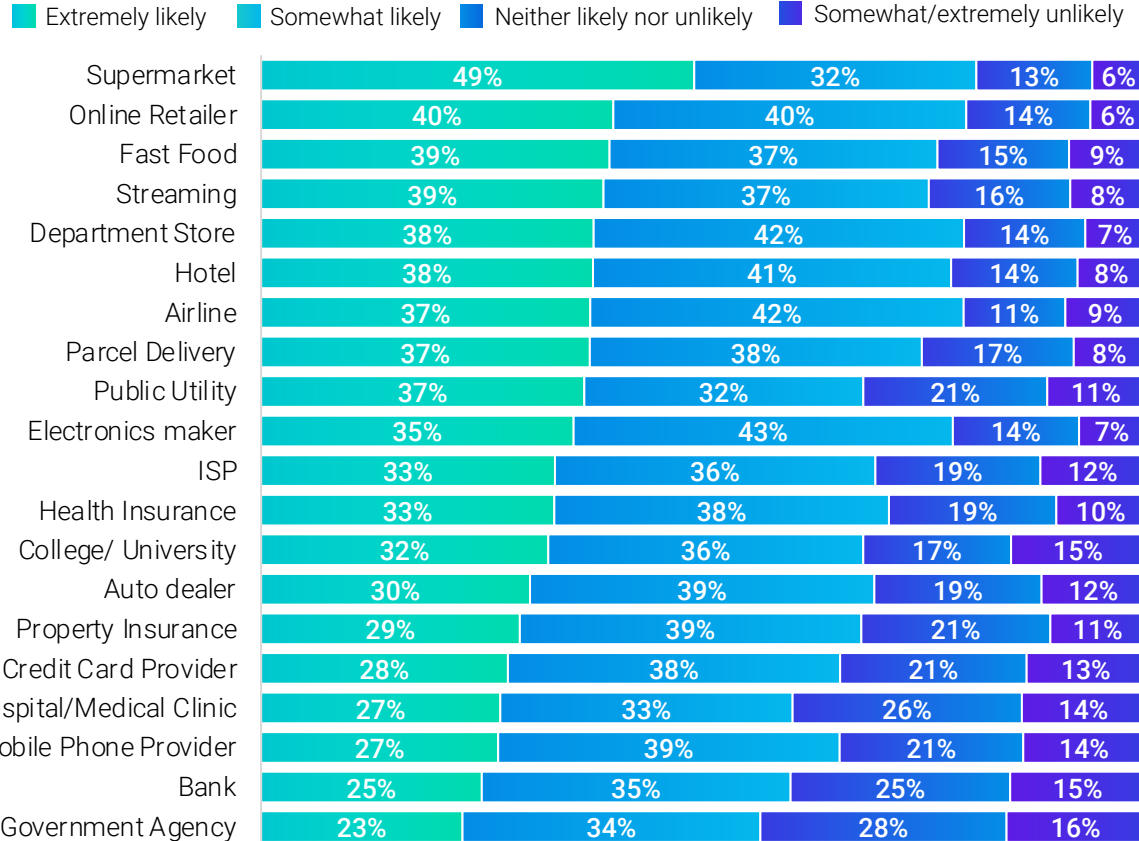
KEY TAKEAWAYS

- + Across all countries, consumers were most frequently extremely likely to purchase more after their supermarket experiences (49%), followed by online retailers (40%). Government agencies are least likely to have customers purchase more (25%).
- + Consumers are not likely to purchase more from government agencies (16%) and colleges/universities (15%) at the highest rates.

ABOUT

This chart shows how consumers from each surveyed country rate their likelihood to purchase more from the organizations they recently interacted with. 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.

How likely are you to PURCHASE MORE from these organizations?



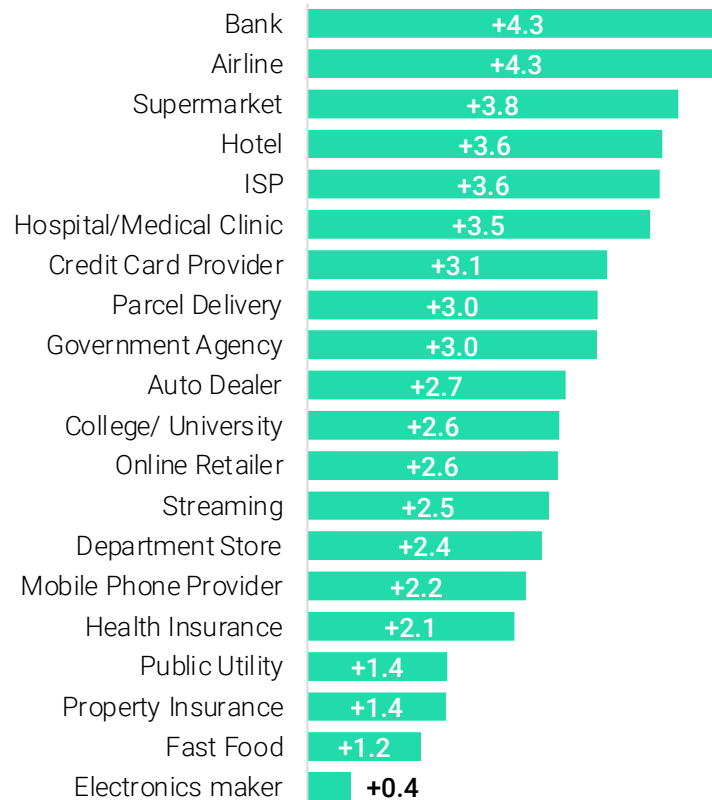
Consumer Rebuying Level YoY Change by Industry

KEY TAKEAWAYS

- + All twenty industries experienced a year-over-year increase in consumer likelihood to purchase more.
- + Across all countries, consumers' likelihood to purchase more increased the most from last year with banks and airlines (4.3 % pts).

Year-over-Year Change in Consumer Likelihood to Rebuy

(Percentage-point change from 2023 consumer rebuying levels to 2024)



ABOUT

This chart shows the year-over-year change in consumer likelihood to purchase more (somewhat or extremely likely) for each industry, across all countries. Data is only reported for the 23 countries and 20 industries for which we collected data in both 2023 and 2022.

Consumer Rebuying By Country/Region and Industry (Part 1)

KEY TAKEAWAYS

- + Emirati consumers are the most likely to purchase more from department stores and online retailers, while French consumers are the most likely to do so from supermarkets.
- + Japanese consumers are the least likely to purchase more after department store, fast food, online retail, and supermarket experiences. Dutch consumers are the least likely to purchase more after electronics maker experiences.

Consumers who are likely to purchase more from these types of companies

	Department store	Fast food restaurant	Online retailer	Electronics maker	Supermarket
Argentina	75%	78%	81%	81%	88%
Australia	80%	77%	79%	75%	87%
Brazil	84%	81%	83%	79%	85%
Canada	84%	80%	83%	N/A	82%
Colombia	87%	88%	88%	86%	90%
China	85%	79%	87%	83%	87%
Finland	87%	87%	71%	N/A	87%
France	86%	81%	84%	67%	94%
Germany	61%	51%	66%	76%	61%
Hong Kong (China)	92%	96%	N/A	N/A	N/A
India	83%	79%	87%	82%	82%
Indonesia	82%	76%	82%	79%	82%
Italy	73%	62%	79%	75%	75%
Japan	46%	42%	53%	N/A	46%
Mexico	78%	76%	81%	70%	87%
Netherlands	64%	66%	68%	65%	67%
New Zealand	77%	84%	82%	N/A	88%
Philippines	91%	89%	87%	77%	91%
Singapore	88%	81%	86%	92%	88%
South Korea	83%	75%	83%	79%	89%
Spain	76%	72%	82%	79%	82%
Sweden	74%	69%	66%	74%	77%
Thailand	75%	72%	78%	72%	80%
United States	79%	82%	87%	N/A	90%
United Kingdom	80%	80%	88%	N/A	87%
United Arab Emirates	93%	90%	89%	85%	91%

ABOUT

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

Consumer Rebuying By Country/Region and Industry (Part 2)

KEY TAKEAWAYS

- + Japanese consumers have the least propensity to purchase more after experiences with organizations in all five industries.
- + Emirati consumers are the most likely to purchase more after experiences in the mobile phone provider and streaming media industries.
- + Hong Kong consumers are the most likely to purchase more after experiences in the banking and credit card provider industries.

Consumers who are likely to purchase more from these types of companies

	Bank	Credit Card Provider	Mobile Phone Provider	ISP	Streaming Media
Argentina	57%	62%	59%	62%	77%
Australia	54%	56%	64%	61%	68%
Brazil	70%	74%	69%	75%	79%
Canada	60%	57%	59%	60%	69%
Colombia	66%	63%	67%	71%	80%
China	75%	79%	78%	89%	82%
Finland	71%	67%	71%	68%	72%
France	67%	60%	64%	68%	85%
Germany	37%	57%	46%	53%	59%
Hong Kong (China)	92%	91%	N/A	N/A	N/A
India	72%	80%	81%	85%	86%
Indonesia	68%	73%	74%	76%	81%
Italy	36%	52%	48%	63%	70%
Japan	21%	37%	34%	31%	47%
Mexico	65%	68%	73%	76%	82%
Netherlands	48%	68%	50%	61%	67%
New Zealand	73%	74%	76%	74%	76%
Philippines	82%	76%	80%	76%	84%
Singapore	76%	74%	73%	80%	83%
South Korea	82%	76%	73%	75%	84%
Spain	43%	56%	58%	61%	75%
Sweden	52%	45%	58%	56%	63%
Thailand	66%	70%	66%	75%	80%
United States	63%	66%	71%	70%	77%
United Kingdom	54%	56%	65%	62%	73%
United Arab Emirates	89%	83%	84%	87%	87%

ABOUT

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

Consumer Rebuying By Country/Region and Industry (Part 3)

KEY TAKEAWAYS

- + Japanese consumers are least likely to purchase more from these five industries after their recent experiences.
- + Consumers in the United Arab Emirates are most likely to purchase more after their recent parcel delivery and property insurer experiences, while consumers in New Zealand are the most likely to do so after recent hotel experiences.

Consumers who are likely to purchase more from these types of companies

	Airline	Hotel	Auto Dealer	Parcel Delivery	Property insurer
Argentina	80%	77%	75%	79%	67%
Australia	79%	80%	68%	75%	65%
Brazil	83%	81%	69%	87%	N/A
Canada	77%	71%	62%	70%	56%
Colombia	84%	80%	78%	81%	76%
China	81%	78%	80%	81%	72%
Finland	71%	73%	N/A	85%	N/A
France	85%	83%	64%	85%	63%
Germany	67%	69%	64%	50%	58%
Hong Kong (China)	93%	N/A	N/A	N/A	N/A
India	88%	87%	82%	85%	82%
Indonesia	83%	79%	83%	80%	74%
Italy	70%	74%	56%	71%	57%
Japan	60%	59%	40%	47%	27%
Mexico	79%	79%	77%	78%	N/A
Netherlands	62%	70%	63%	53%	64%
New Zealand	86%	90%	86%	83%	80%
Philippines	89%	85%	N/A	83%	76%
Singapore	87%	87%	91%	80%	79%
South Korea	84%	78%	62%	85%	60%
Spain	78%	78%	70%	74%	56%
Sweden	70%	75%	55%	71%	N/A
Thailand	78%	75%	67%	66%	78%
United States	84%	84%	66%	81%	70%
United Kingdom	75%	75%	67%	72%	61%
United Arab Emirates	90%	89%	85%	88%	87%

ABOUT

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

Consumer Rebuying By Country/Region and Industry (Part 4)

KEY TAKEAWAYS

- + Emirati consumers are the most likely to recommend colleges/universities, government agencies, public utilities, and hospitals/medical clinics to their friends and family.
- + South Koreans are the least likely to recommend colleges/universities (65%), while Swedes are least likely to recommend government agencies (42%).

Consumers who are likely to purchase more from these types of companies

	College/ University	Government agency	Public Utility	Health Insurer	Hospital/ Medical clinic
Argentina	66%	59%	69%	69%	61%
Australia	64%	51%	66%	63%	66%
Brazil	73%	53%	78%	74%	71%
Canada	58%	46%	63%	60%	60%
Colombia	76%	62%	74%	70%	65%
China	68%	63%	86%	80%	74%
Finland	N/A	64%	73%	N/A	73%
France	65%	56%	77%	63%	61%
Germany	67%	60%	36%	58%	40%
Hong Kong (China)	N/A	N/A	N/A	N/A	N/A
India	75%	72%	83%	85%	76%
Indonesia	68%	56%	76%	83%	64%
Italy	49%	45%	48%	64%	42%
Japan	N/A	N/A	24%	28%	31%
Mexico	70%	56%	79%	77%	64%
Netherlands	58%	36%	40%	58%	43%
New Zealand	77%	68%	N/A	82%	65%
Philippines	73%	66%	83%	80%	71%
Singapore	71%	71%	79%	74%	73%
South Korea	63%	68%	79%	74%	82%
Spain	74%	50%	57%	63%	58%
Sweden	50%	41%	55%	55%	58%
Thailand	75%	54%	65%	75%	58%
United States	61%	50%	71%	74%	64%
United Kingdom	55%	49%	66%	71%	55%
United Arab Emirates	90%	85%	82%	83%	81%

ABOUT

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

DATA CALCULATION

Year-over-year calculations in **Figures 2, 4, 10, 12, 18, 20, 26, and 28** come from the Qualtrics XM Institute Q3 2022 Global Consumer Study of 33,093 consumers. This study surveyed a representative sample of approximately 1,200 consumers from each of the following countries/regions: Argentina, Australia, Belgium, Brazil, Canada, China, Colombia, France, Germany, Hong Kong (China), 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.

Calculations were only performed using data from countries/regions for which we had data in both 2022 and 2023*. Data is reported only for countries with 100 or more consumers who reported having an experience with an organization in that industry within the previous 90 days.

Year-over-year calculations were performed by subtracting the 2023 satisfaction, trust, advocacy, and likelihood to rebuy percentages as calculated below from their respective satisfaction, trust, advocacy, and likelihood to rebuy scores from 2022 calculated according to the same methodology.

Figures 1-8 were calculated by taking the total number of responses rating each country/region, industry, and industry within a country/region 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* to trust/recommend/purchase more after an experience and dividing by the total number of responses for each country, industry, and industry within a country, respectively.

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

*Year-over-year calculations were not performed for Hong Kong (China) due to the small number of industries that qualified for reporting in this country in 2023.

+Data threshold (100+ responses) was not achieved in both years for the following industries/countries: Electronics makers: France & Spain, Auto dealers: South Korea & UK, Health insurers: UK, Property insurers: Brazil & Argentina & Colombia, Government agencies: France, Public utilities: New Zealand, College/Universities: France, Germany, South Korea.

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