Qualtrics XM institute™

DATA SNAPSHOT

How *Success, Effort*, and *Emotion* Affect Customer Loyalty, 2024

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of Qualtrics XM Institute's 2023 US Consumer Study, we asked 10,000 consumers to rate their recent interactions with brands across the three dimensions of customer experience – *success, effort, and emotion* – and how likely they are to perform four loyalty activities afterward: *trust* the brand*, forgive* the brand for a mistake*, recommend* the brand to others*,* and *purchase more* from the brand*.* From our analysis, we learned that:

+ *Emotion* **has the largest impact.** Consumers with a high *emotion* rating are the most likely to exhibit each of the four loyalty behaviors compared to consumers with high *success* or *effort* ratings. On average across all industries, high *emotion* scores are most likely to coincide with high likelihood to *purchase more*.

+ *Effort* **and** *success* **also have positive effects on loyalty.** On average across all industries, *effort* and *success* have a strong positive impact on all loyalty behaviors. As with *emotion,* these customer experience components have the strongest relationship with likelihood to *purchase more.* Seventy-eight percent of respondents who give a high *effort* rating say they are likely to purchase more, while only 18% with a low *effort* rating say the same. These numbers for *success* are 77% and 19%, respectively.

+ **Airlines benefit the most from strong customer experiences.** Of the 22 industries, airlines' *success* and *emotion* ratings have the strongest relationship with each the four loyalty behaviors. On average, consumers who give an airline high *emotion* ratings are 8.3x more likely to have strong loyalty than those with low *emotion* ratings, while those with high *success* ratings are 5.3x more likely to exhibit strong loyalty behaviors.

+ **Consumer payments loyalty is least affected by customer experience.** Consumers with high *success* ratings are, on average, 37 points more likely than those with low *success* ratings to *recommend, forgive, trust,* and *purchase more* – the smallest gap across all 22 industries. Consumers with high *effort* ratings are 41 points more likely to exhibit these behaviors, while high *emotion* ratings leads to a 48 points gap – each the smallest gap present for the component.

STUDY KEY FACTS

- US consumer study
- Online panel study
- Conducted in Q3 of 2023
- 351 brands
- 22 industries
- 10,000 consumers

How *Success, Effort,* and *Emotion* Affect Customer Loyalty, 2024

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STUDY OVERVIEW

The data for this report comes from a US Consumer study that Qualtrics XM Institute conducted in the third quarter of 2023. Using an online survey, XM Institute collected data from 10,000 consumers within the United States of America. To ensure that the data was reflective of the population within those countries, we set quotas for responses to match the gender, age, ethnicity, geographical region, and income according to the latest available U.S. Census.

FIGURES IN THE REPORT

Customer Experience and Loyalty Measurements

Three Components of a Customer Experience

SUCCESS — *To what degree were you able to accomplish what you wanted to do?*

EFFORT — *How easy was it to interact with the company?*

EMOTION — *How did you feel about the interaction?*

Four Loyalty Measurements

RECOMMEND — *How likely are you to recommend this company to a friend or relative?*

PURCHASE MORE — *How likely are you to consider purchasing more products or services from this company in the future?*

FORGIVE — *How likely are you to forgive this company if they deliver a bad experience?*

TRUST — *To what degree do you trust that this company will take care of your needs?*

Consumers rated each component statement on a 7-point scale*:

▇ Low rating	▇ Neutral rating	▇ High Rating
1 2 3	4 5	6 7
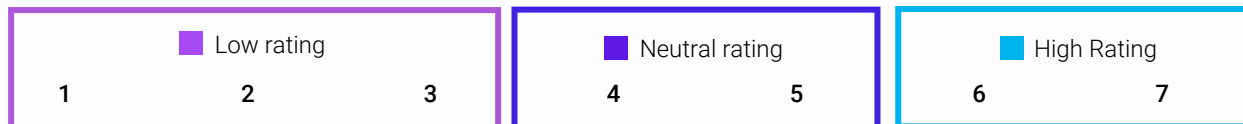
Each scale is labeled according to question-specific attributes

CX and Loyalty Connections – All Industries

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in brands, with their degree of *trust* 5.1x higher after a delightful experience versus after an upsetting experience.

+ Consumers are 3.9x more likely to *forgive* a brand if they deliver a bad experience and 8.4x more likely to *recommend* a brand to friends/family after an easy experience versus after a difficult one *(effort)*.

+ Brands are 3.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 351 brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

	Success (Low / Neutral / High)	Effort (Low / Neutral / High)	Emotion (Low / Neutral / High)
Trust	18% / 28% / 70%	15% / 27% / 72%	15% / 32% / 78%
Recommend	11% / 16% / 61%	8% / 16% / 63%	8% / 19% / 70%
Forgive	18% / 25% / 56%	15% / 23% / 58%	16% / 25% / 64%
Purchase More	19% / 34% / 77%	18% / 33% / 78%	18% / 40% / 83%

CX and Loyalty Connections – Airline

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in airlines, with their degree of *trust* 8.2x higher after a delightful experience versus after an upsetting experience.

+ Consumers are 5.3x more likely to *forgive* an airline if they deliver a bad experience after an easy experience versus after a difficult one.

+ Airlines are 5.2x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 9 airlines

Legend: ■ Low rating ■ Neutral rating ■ High Rating

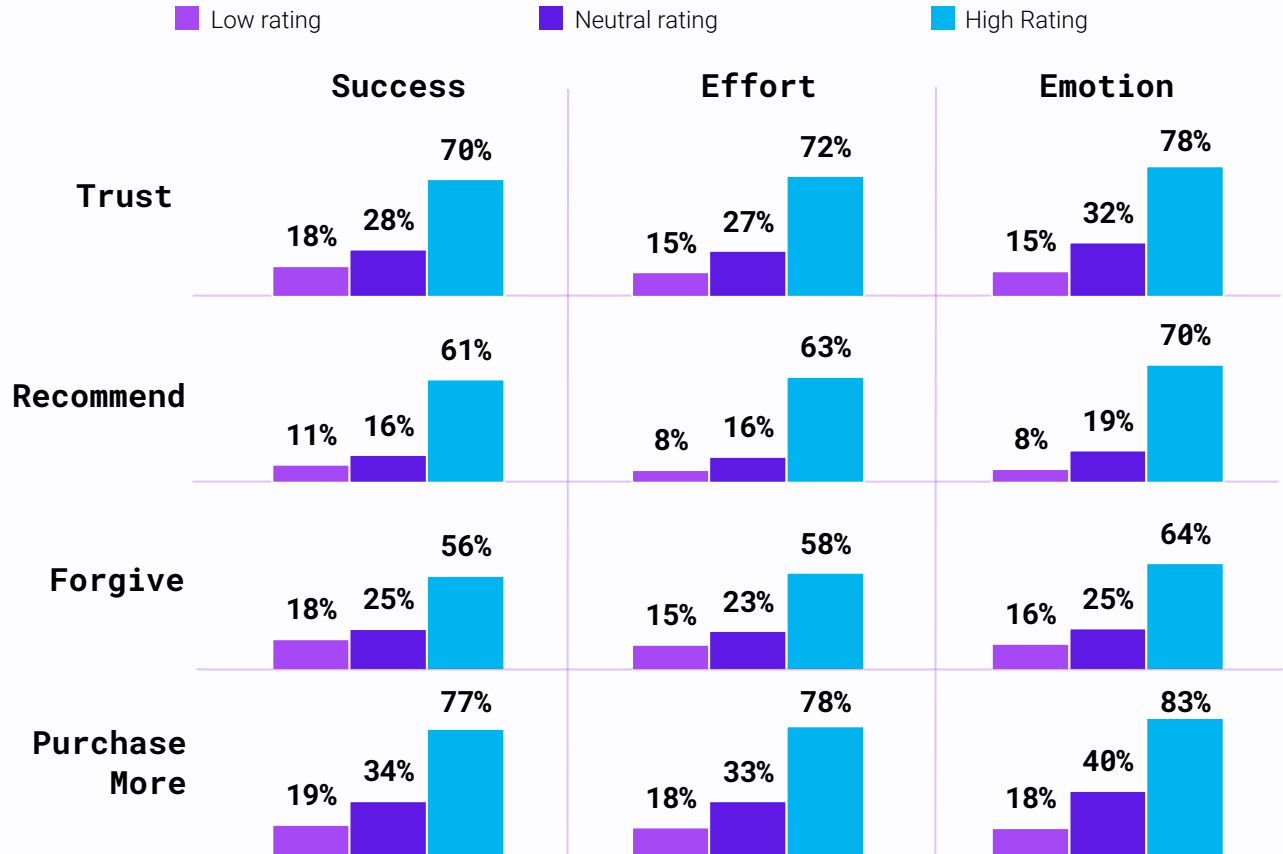|	Success			Effort			Emotion		
Trust	14%	28%	74%	10%	29%	78%	10%	30%	82%
Recommend	8%	14%	62%	6%	16%	66%	6%	14%	72%
Forgive	14%	24%	59%	12%	21%	63%	10%	22%	67%
Purchase More	16%	32%	83%	15%	36%	85%	11%	39%	89%

CX and Loyalty Connections – Auto

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in auto brands, with their degree of *trust* 6.3x higher after an easy experience versus after a difficult one.

+ Consumers are 5.1x more likely to *forgive* an auto brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Auto brands are 4.0x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

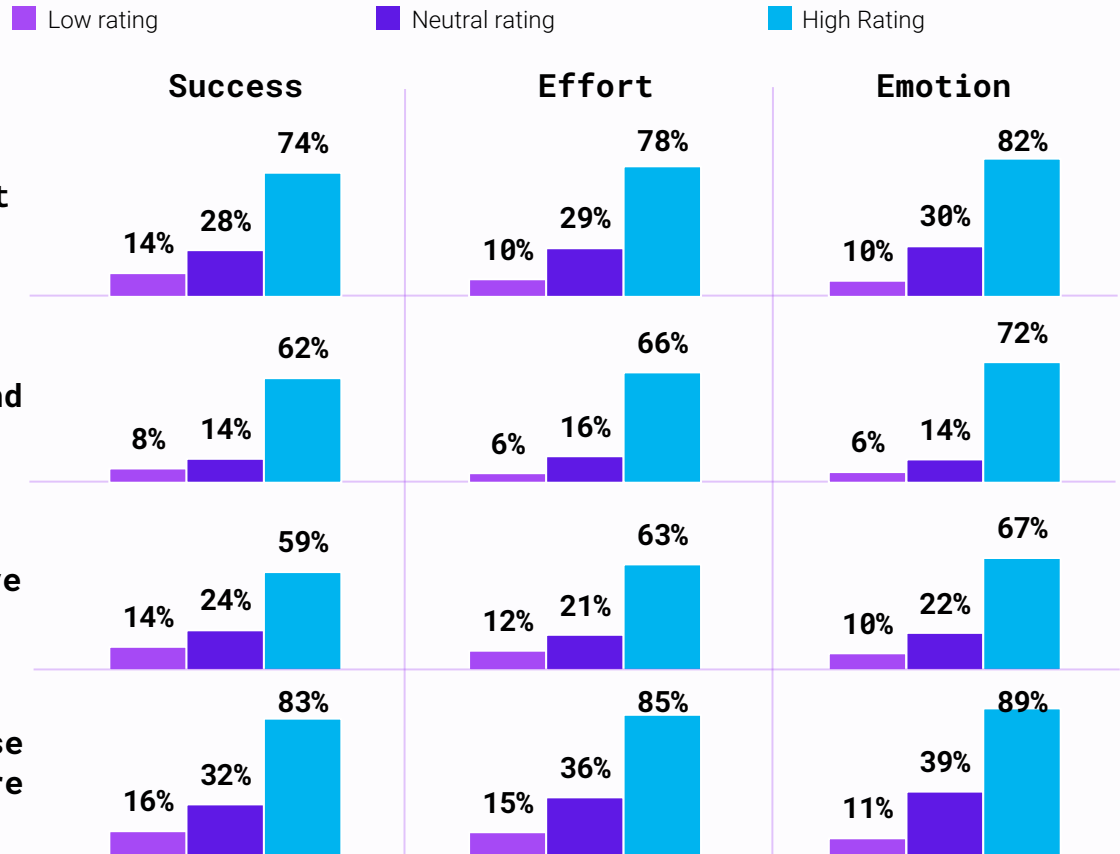### Consumer Loyalty based on Customer Experience Ratings
across 18 auto brands

Legend: Low rating | Neutral rating | High Rating

Likely to…

	Success (Low / Neutral / High)			Effort (Low / Neutral / High)			Emotion (Low / Neutral / High)		
Trust	17%	35%	78%	14%	33%	80%	13%	39%	82%
Recommend	10%	22%	69%	8%	20%	70%	9%	24%	74%
Forgive	19%	27%	61%	13%	26%	62%	13%	28%	66%
Purchase More	20%	39%	80%	17%	38%	81%	15%	44%	84%

CX and Loyalty Connections – Banking

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in banks, with their degree of *trust* 8.4x higher after an easy versus a difficult experience.

+ Consumers are 5.3x more likely to *forgive* a bank if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Banks are 3.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
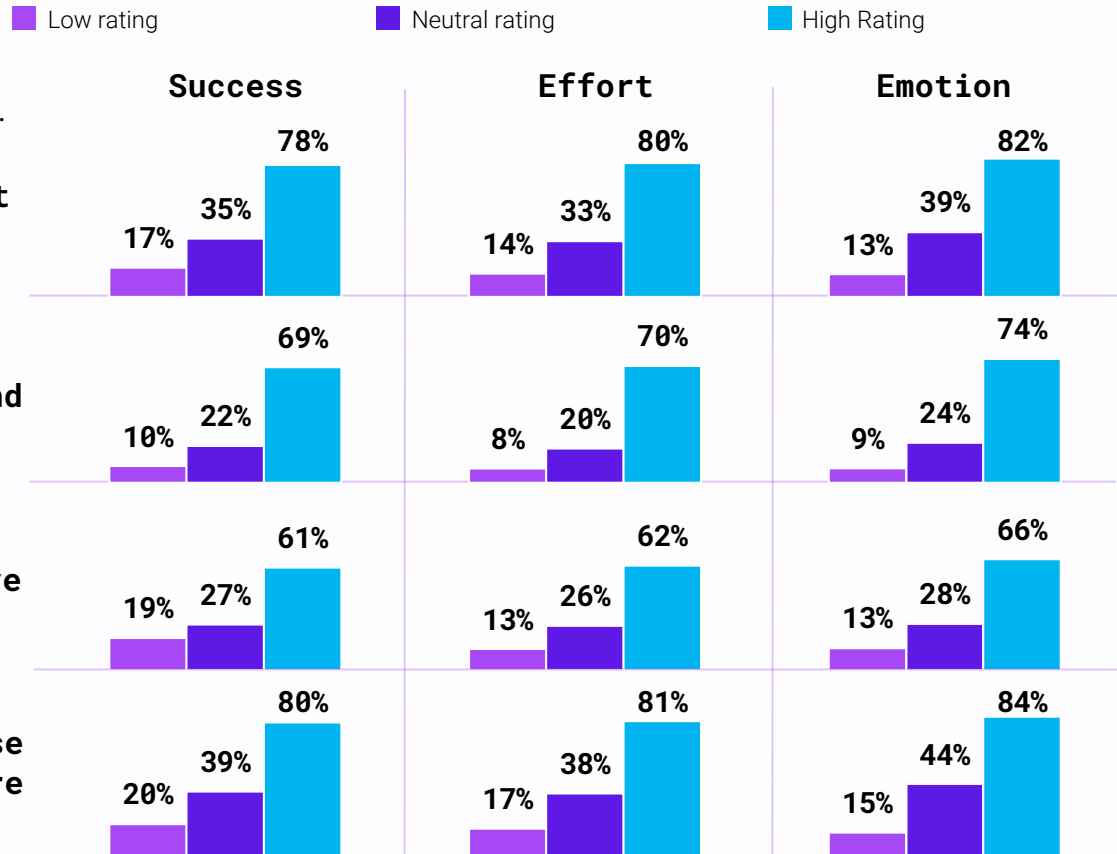
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 15 banks

Legend: ■ Low rating   ■ Neutral rating   ■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	15%	24%	74%	9%	25%	76%	11%	37%	83%
Recommend	13%	13%	63%	5%	12%	65%	7%	20%	74%
Forgive	15%	20%	54%	10%	18%	56%	12%	22%	63%
Purchase More	19%	26%	73%	12%	27%	74%	9%	37%	81%

CX and Loyalty Connections – Car Rental

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in car rental brands, with their degree of *trust* 5.8x higher after a delightful experience versus after an upsetting one.

+ Consumers are 10.1x more likely to *recommend* a car rental brand to friends or family after an easy experience compared to after a difficult one.

+ Car rental brands are 4.5x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
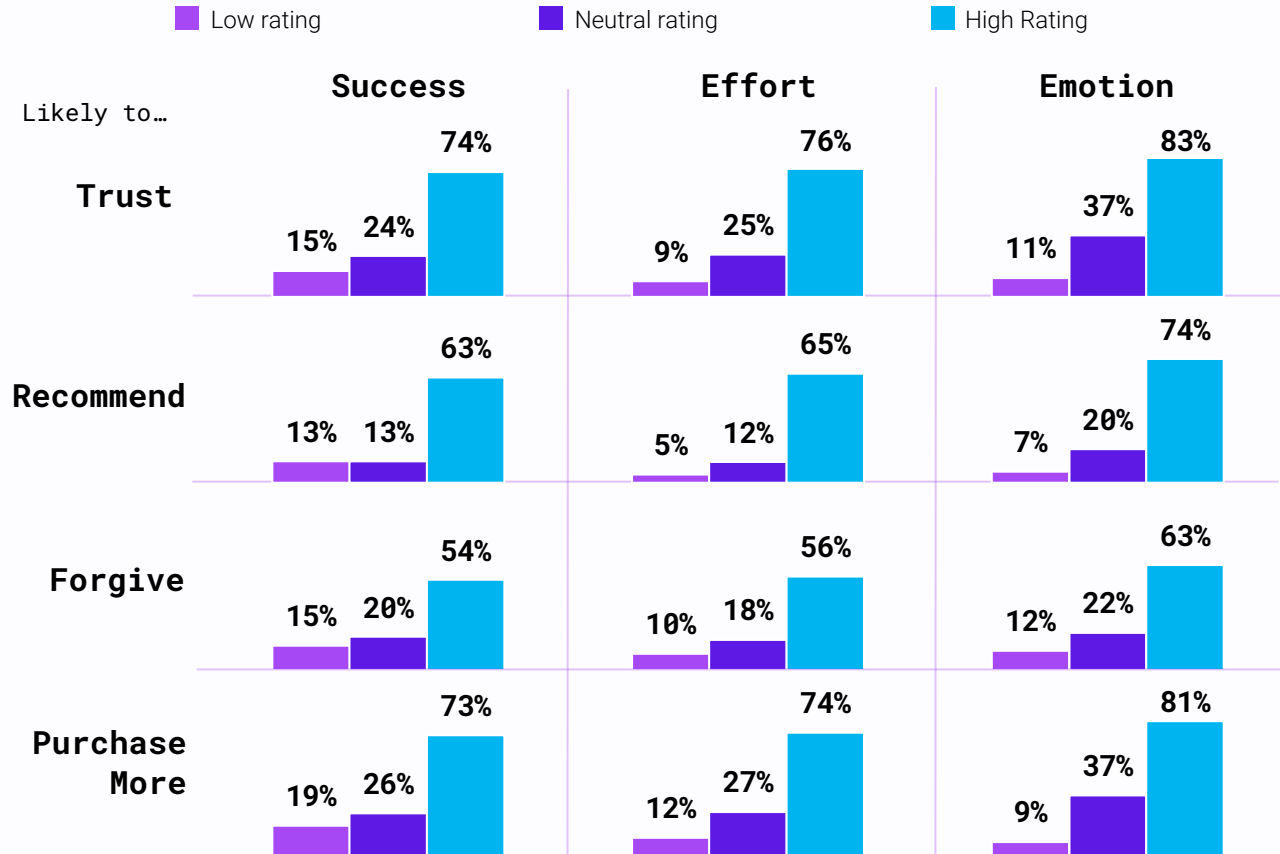
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 14 car rental brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Trust	17%	33%	68%	16%	29%	71%	13%	31%	76%
Recommend	6%	16%	59%	6%	14%	61%	5%	18%	65%
Forgive	14%	28%	56%	14%	27%	57%	11%	26%	62%
Purchase More	17%	35%	76%	17%	34%	77%	13%	39%	80%

CX and Loyalty Connections – Computer/Tablet Makers

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in computer & tablet brands, with their degree of *trust* 5.3x higher after an easy versus a difficult experience.

+ Consumers are 4.0x more likely to *forgive* a computer & tablet brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Computer/tablet makers are 3.5x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
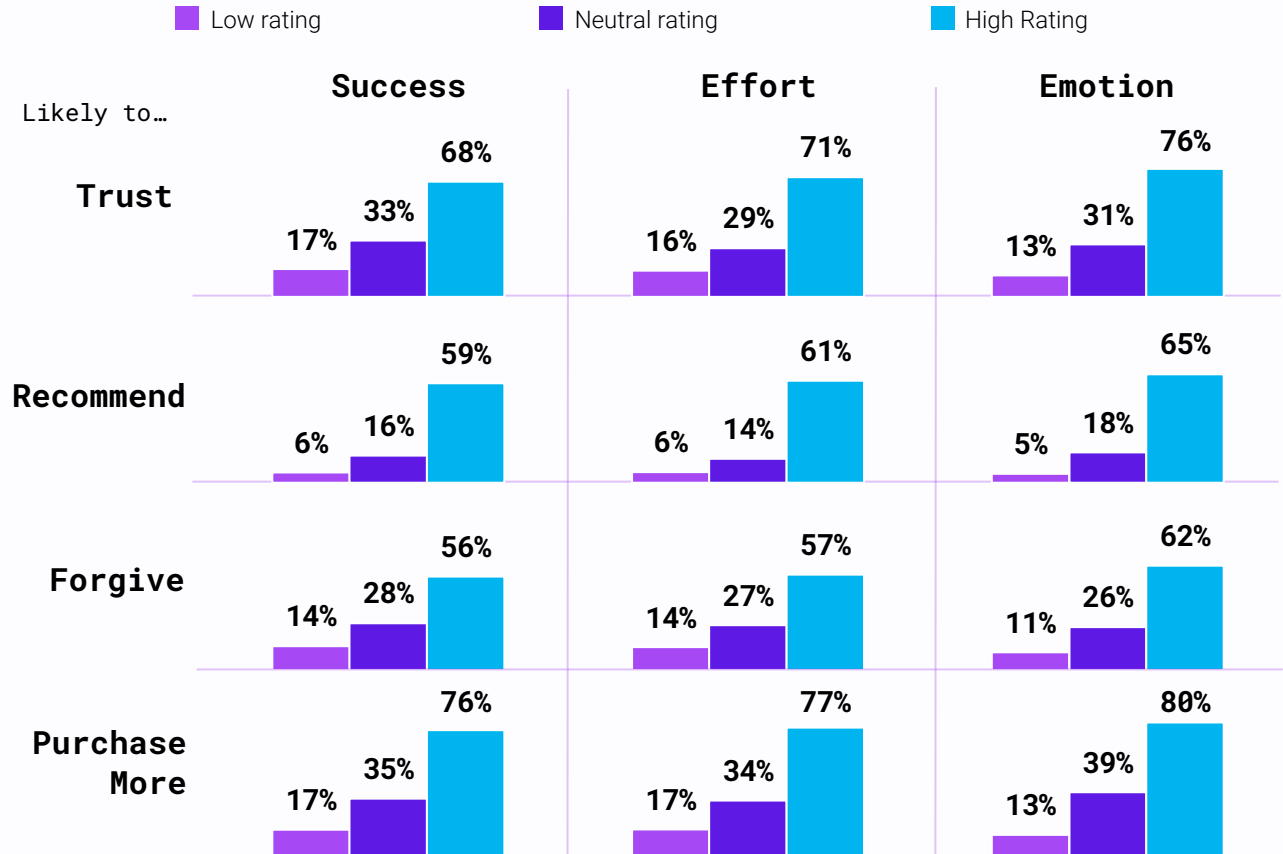**Source:** Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 13 computer & tablet brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	21%	28%	71%	14%	30%	74%	16%	33%	77%
Recommend	11%	18%	65%	7%	21%	67%	8%	22%	72%
Forgive	20%	25%	58%	21%	25%	60%	16%	26%	64%
Purchase More	22%	35%	78%	21%	38%	79%	18%	41%	82%
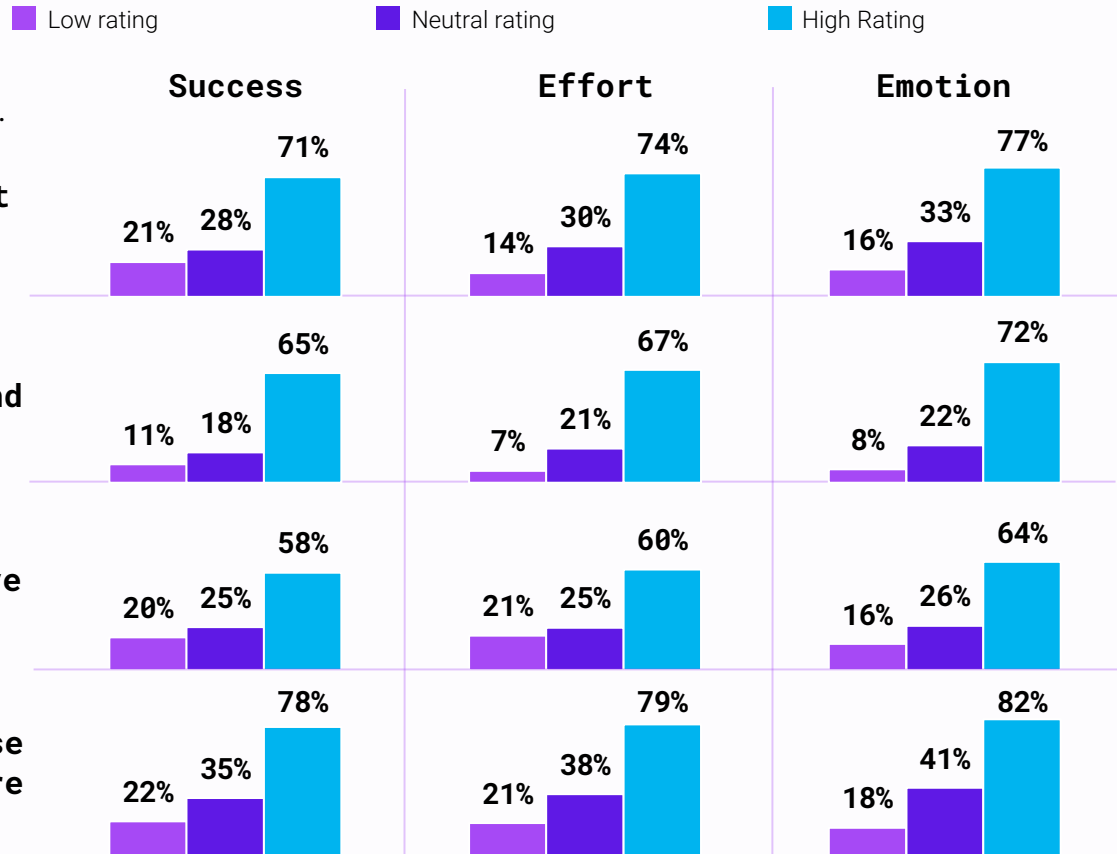
CX and Loyalty Connections – Consumer Payment

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in consumer payment brands, with their degree of *trust* 4.3x higher after an easy versus a difficult experience.

+ Consumers are 2.1x more likely to *forgive* a consumer payment brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Consumer payment providers are 2.3x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 17 consumer payments brands

■ Low rating　■ Neutral rating　■ High Rating

Likely to…

	Success	Effort	Emotion
Trust	18% 27% 70%	17% 25% 73%	32% 47% 78%
Recommend	13% 14% 44%	12% 12% 46%	10% 14% 67%
Forgive	15% 23% 51%	13% 20% 54%	29% 32% 61%
Purchase More	22% 24% 51%	19% 24% 53%	17% 22% 74%

CX and Loyalty Connections – Electronics

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in electronics brands, with their degree of *trust* 4.2x higher after a delightful versus after an upsetting experience.

+ Consumers are 9.1x more likely to *recommend* an electronics brand to friends or family after an easy experience versus after a difficult one *(emotion).*

+ Electronics brands are 3.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
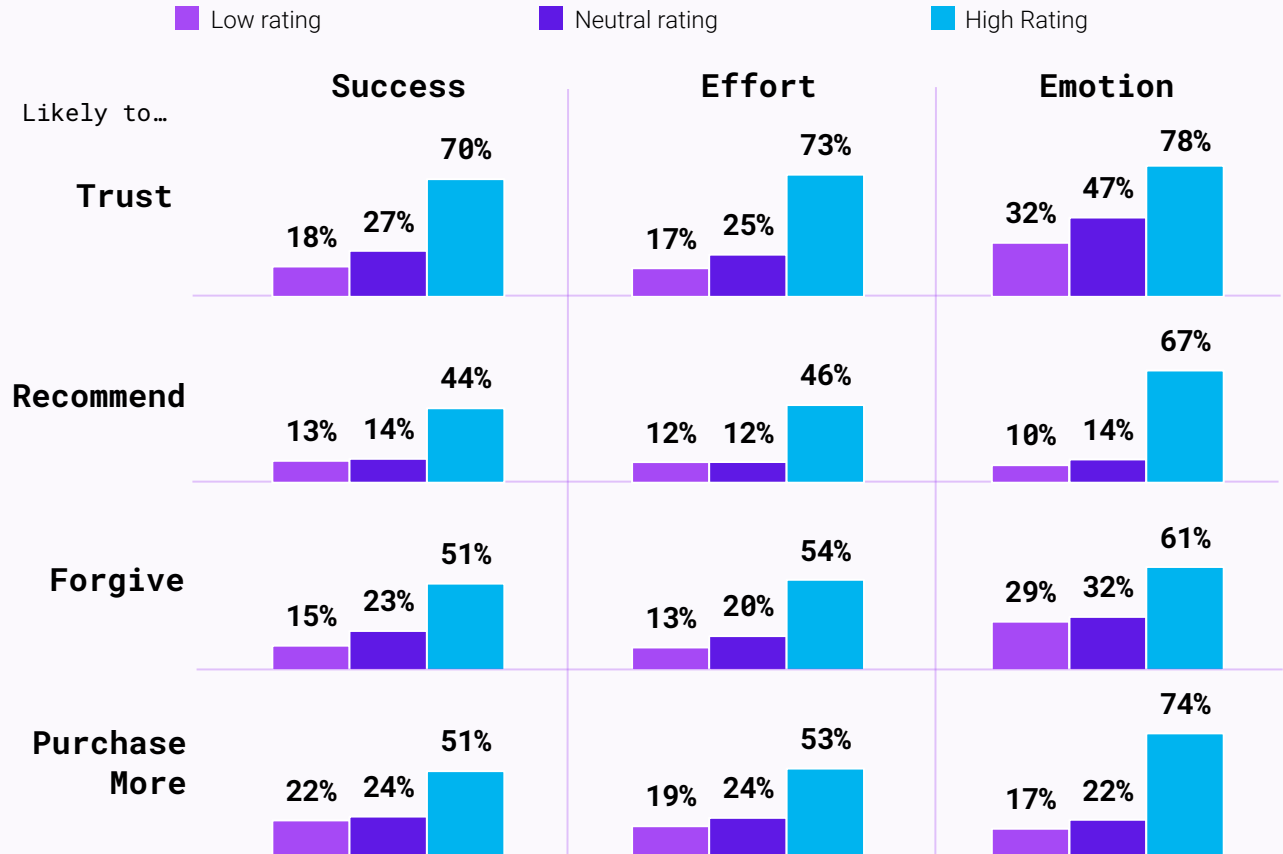
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 13 electronics brands

■ Low rating ■ Neutral rating ■ High Rating

Likely to…

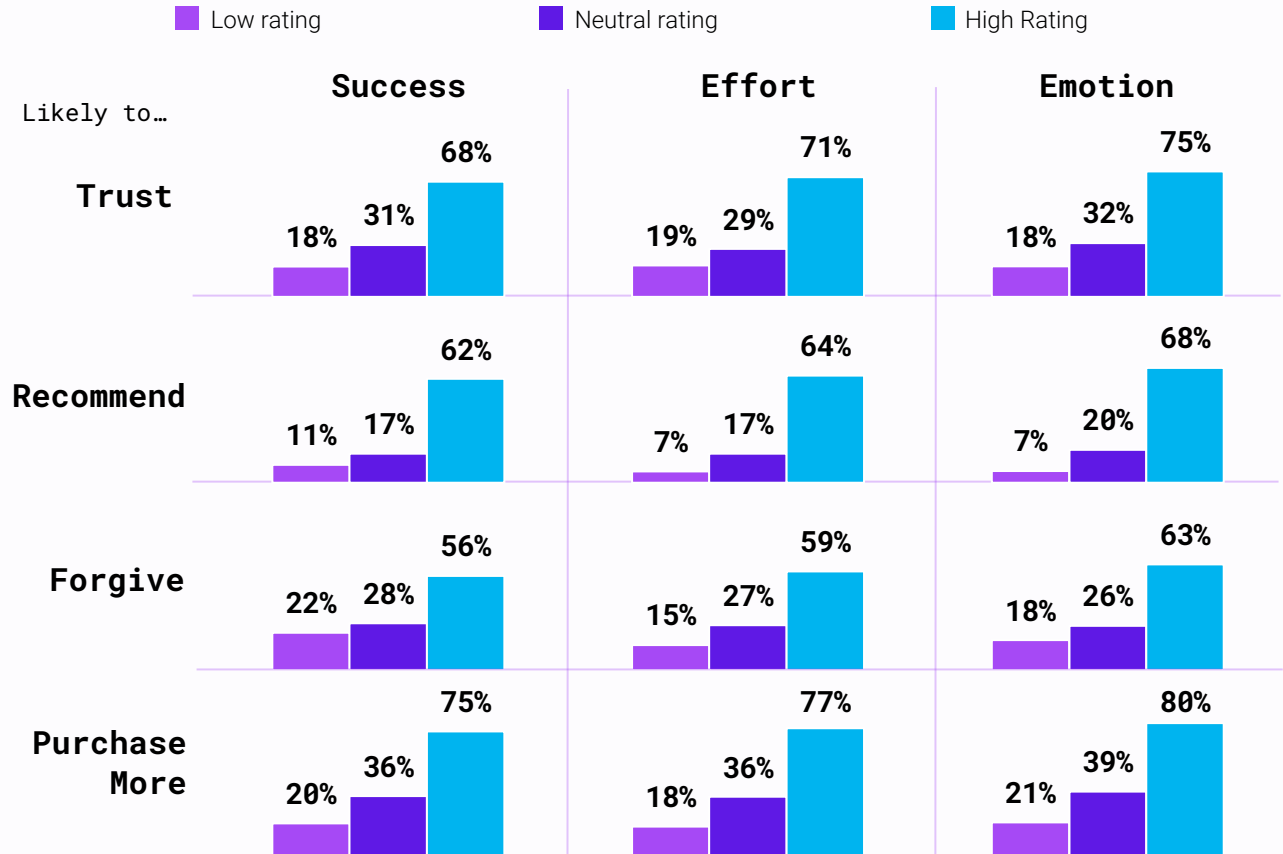|	Success			Effort			Emotion		
Trust	18%	31%	68%	19%	29%	71%	18%	32%	75%
Recommend	11%	17%	62%	7%	17%	64%	7%	20%	68%
Forgive	22%	28%	56%	15%	27%	59%	18%	26%	63%
Purchase More	20%	36%	75%	18%	36%	77%	21%	39%	80%

CX and Loyalty Connections – Fast Food

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in fast food brands, with their degree of *trust* 6.7x higher after a delightful versus an upsetting experience.

+ Consumers are 3.2x more likely to *forgive* a fast food brand if they deliver a bad experience after an easy experience versus after a difficult one *(effort)*.

+ Fast food brands are 4.5x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 24 fast food brands

■ Low rating　　■ Neutral rating　　■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	15%	26%	65%	13%	23%	66%	11%	27%	74%
Recommend	8%	15%	60%	6%	14%	61%	8%	17%	69%
Forgive	19%	24%	53%	17%	22%	54%	13%	23%	61%
Purchase More	18%	36%	81%	20%	36%	82%	19%	45%	87%
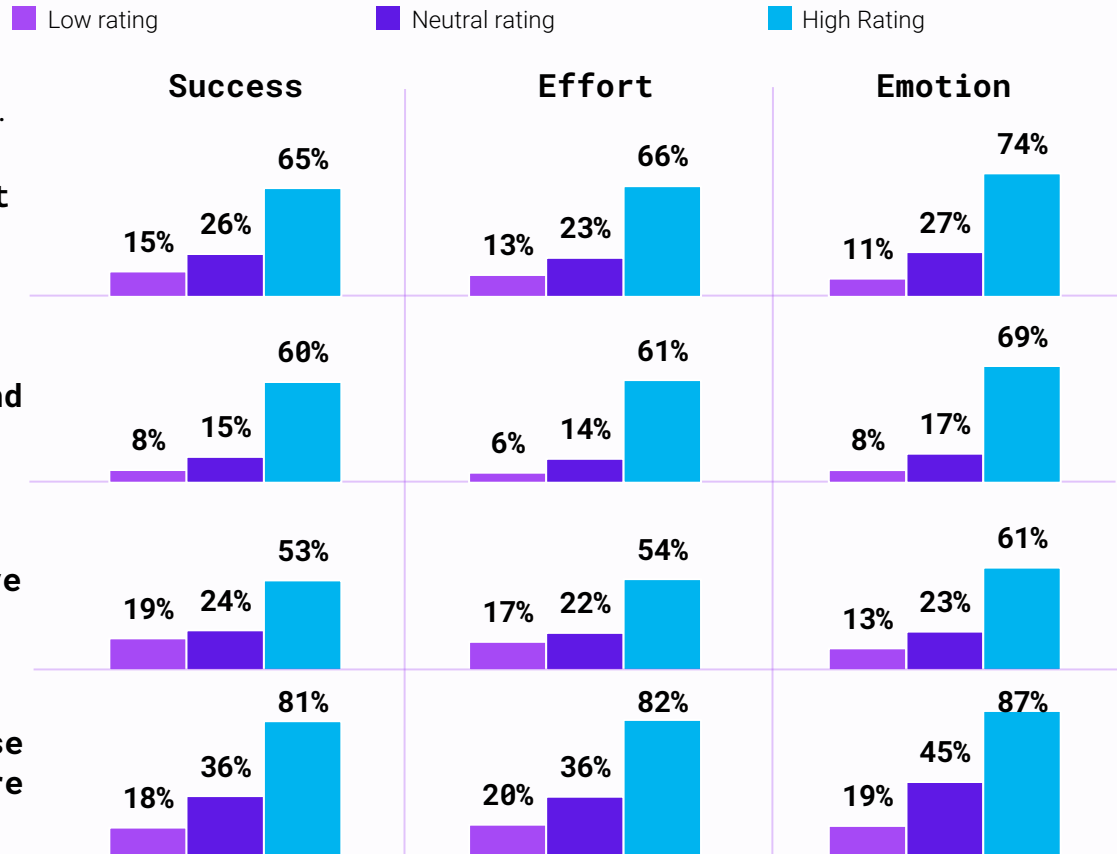
CX and Loyalty Connections – Food Takeout & Delivery

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in food takeout and delivery brands, with their degree of trust 4.1x higher after an easy versus a difficult experience.

+ Consumers are 3.5x more likely to *forgive* a food and takeout delivery brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion).*

+ Food and takeout delivery brands are 3.6x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Consumer Loyalty based on Customer Experience Ratings
across 12 food delivery & takeout brands

■ Low rating   ■ Neutral rating   ■ High Rating

Likely to…	Success	Effort	Emotion
Trust	23% / 32% / 72%	18% / 29% / 73%	19% / 32% / 76%
Recommend	12% / 19% / 65%	10% / 18% / 65%	11% / 19% / 69%
Forgive	23% / 30% / 61%	17% / 27% / 62%	19% / 27% / 66%
Purchase More	22% / 38% / 80%	17% / 35% / 81%	19% / 40% / 84%

CX and Loyalty Connections – Grocery

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in grocery brands, with their degree of *trust* 4.8x higher after a delightful versus an upsetting experience.

+ Consumers are 3.0x more likely to *forgive* a grocery brand if they deliver a bad experience after an easy experience versus after a difficult one *(effort)*.

+ Grocers are 3.7x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
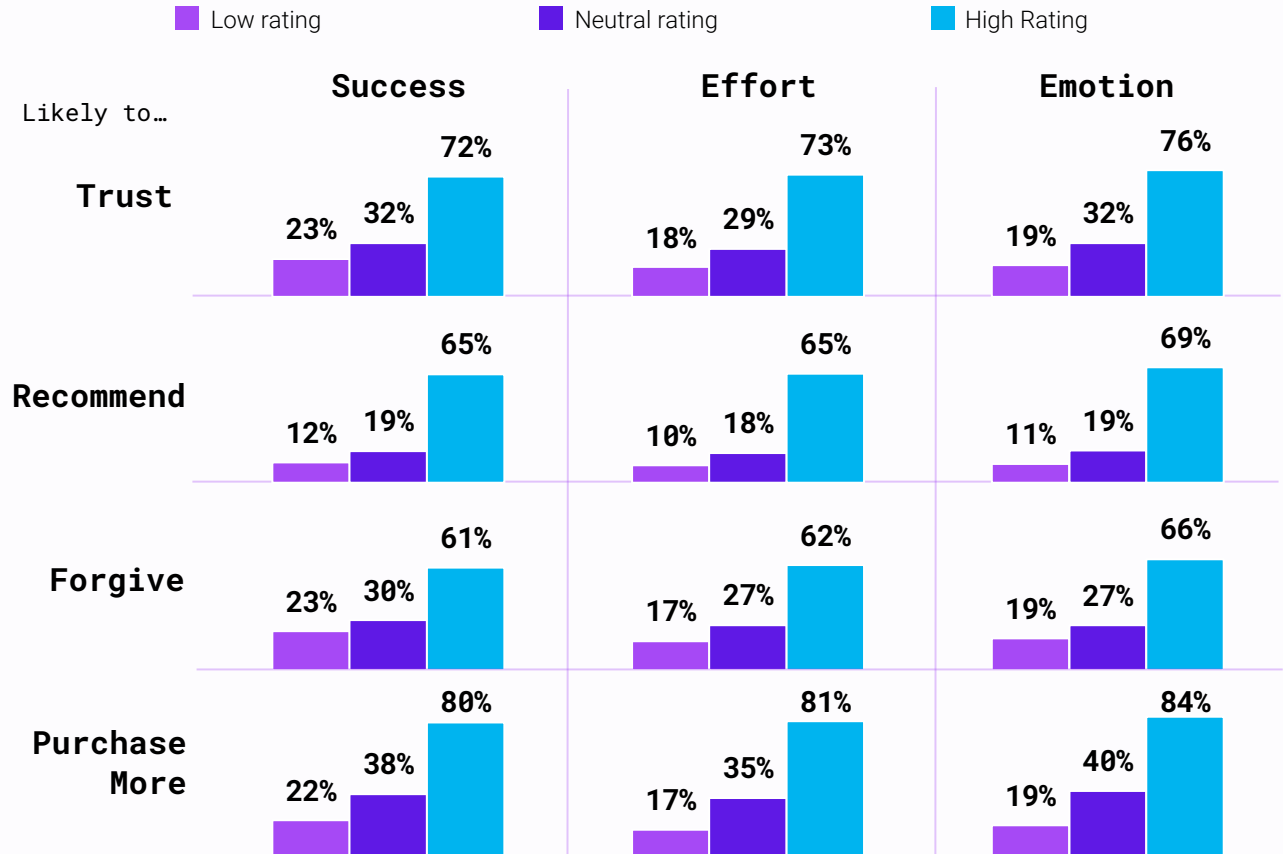
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 20 grocery brands

Legend: ■ Low rating   ■ Neutral rating   ■ High Rating

Likely to…

	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Trust	31%	29%	73%	23%	30%	73%	17%	36%	81%
Recommend	15%	16%	63%	7%	16%	64%	11%	20%	72%
Forgive	25%	27%	58%	22%	26%	59%	22%	28%	65%
Purchase More	23%	43%	86%	27%	40%	86%	25%	54%	90%

CX and Loyalty Connections – Health Insurance

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in health insurance brands, with their degree of *trust* 5.9x higher after an easy versus a difficult experience.

+ Consumers are 4.6x more likely to *forgive* a health insurance brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Health insurers are 4.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
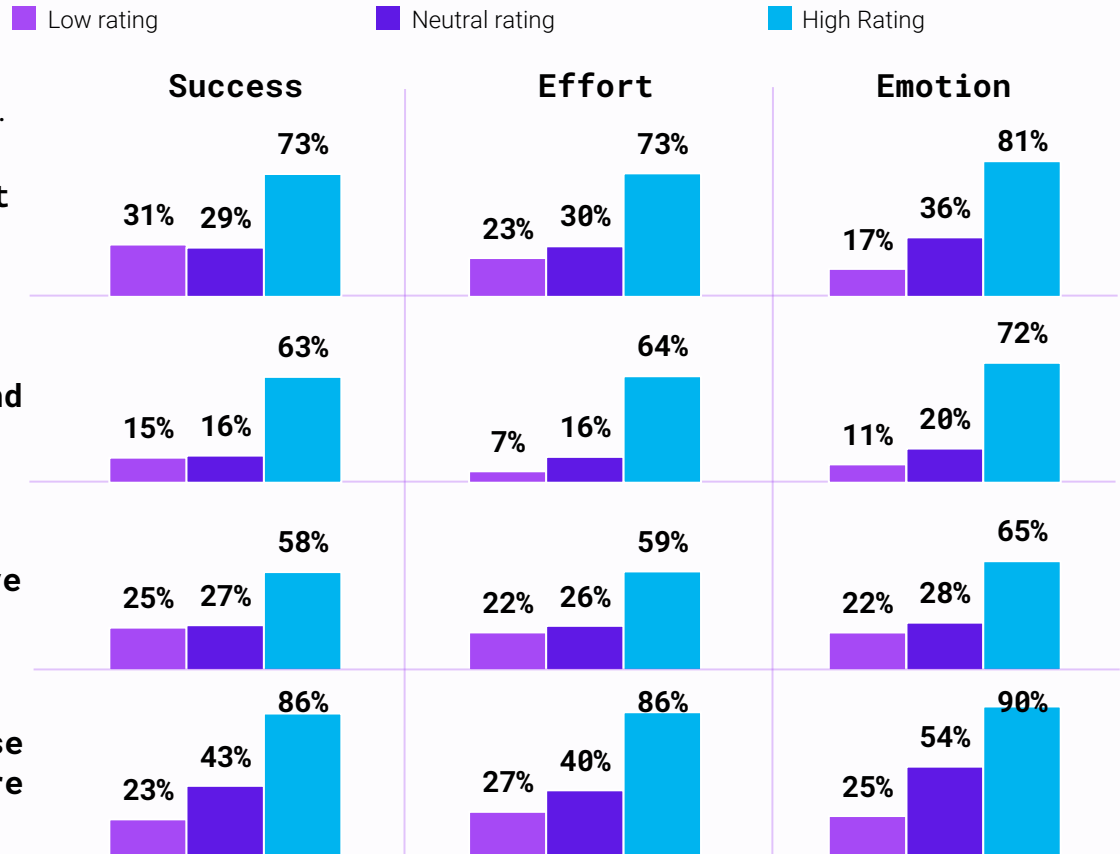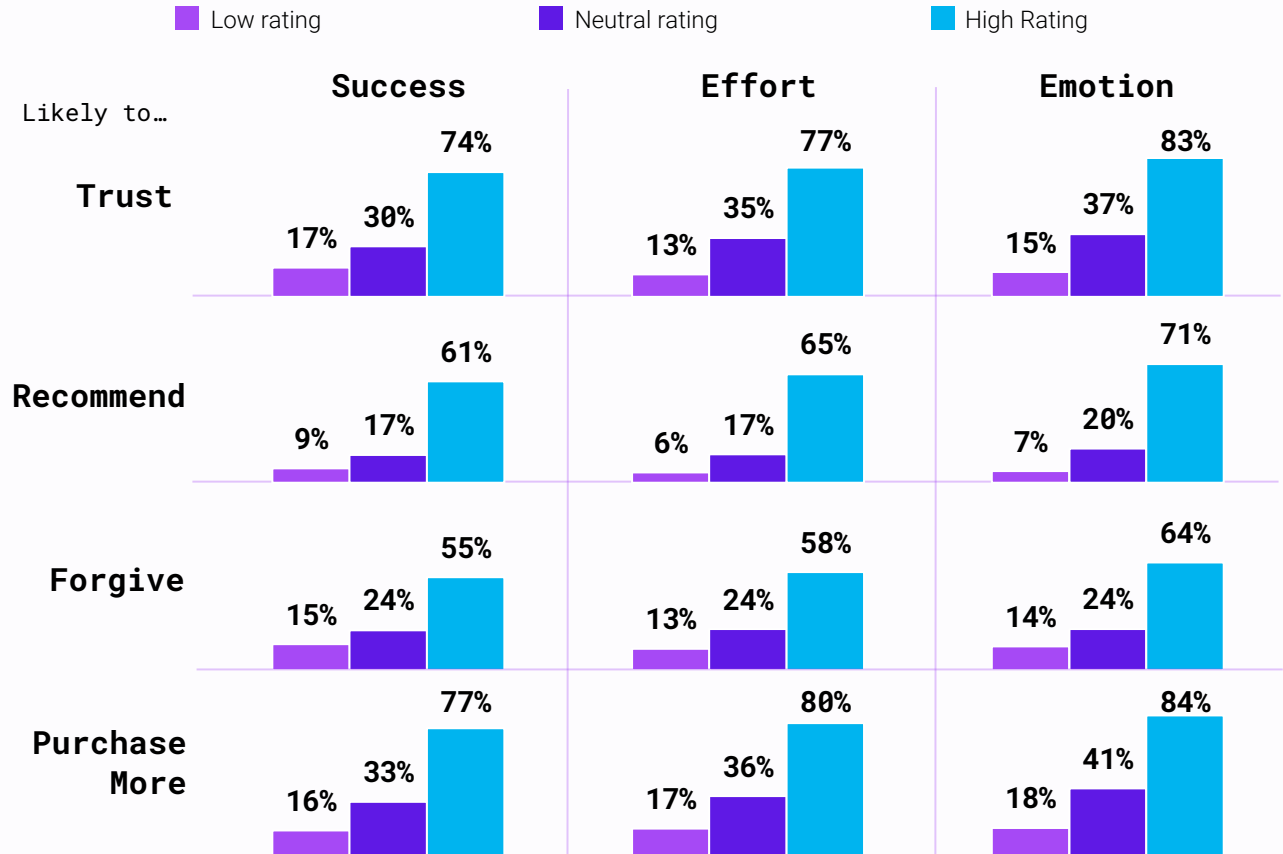
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 15 health insurance brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…

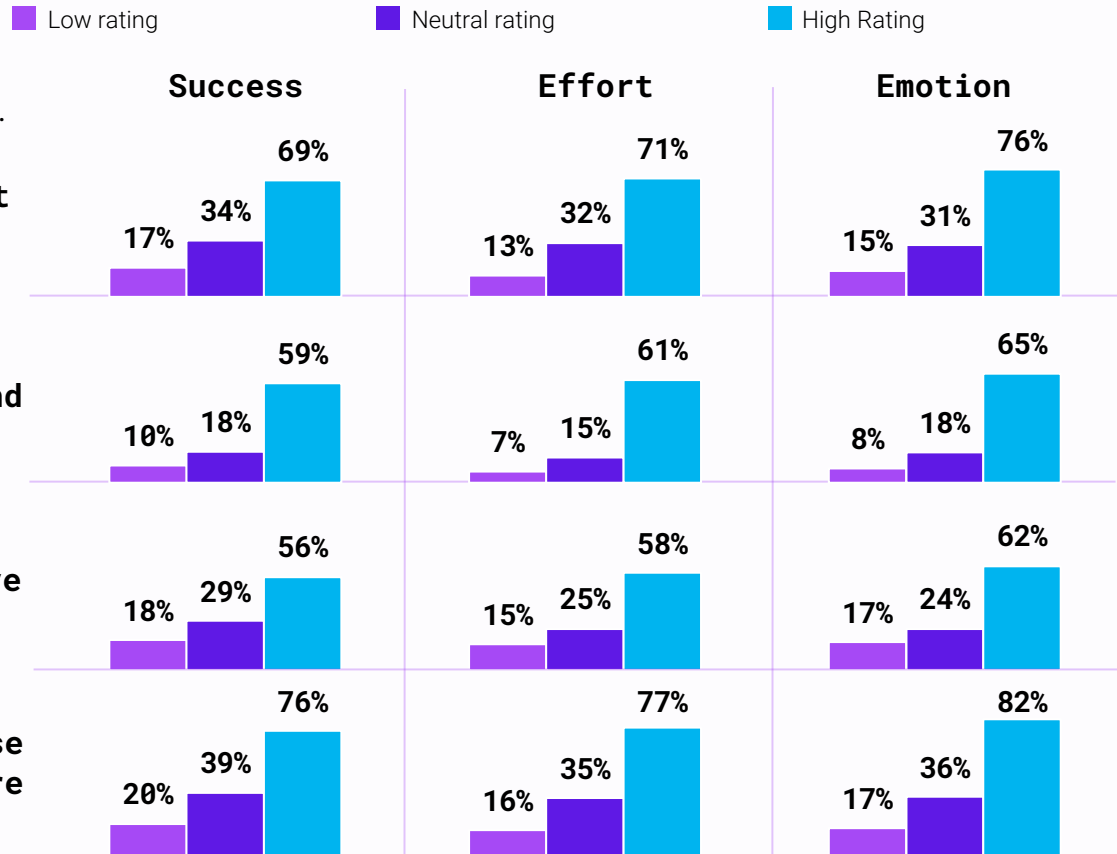|	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Trust	17%	30%	74%	13%	35%	77%	15%	37%	83%
Recommend	9%	17%	61%	6%	17%	65%	7%	20%	71%
Forgive	15%	24%	55%	13%	24%	58%	14%	24%	64%
Purchase More	16%	33%	77%	17%	36%	80%	18%	41%	84%

CX and Loyalty Connections – Hotel

Consumer Loyalty based on Customer Experience Ratings
across 22 hotel brands

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in hotel brands, with their degree of *trust* 5.5x higher after an easy versus a difficult experience.

+ Consumers are 8.1x more likely to *recommend* a hotel brand to friends and family after a delightful experience versus after an upsetting one *(emotion)*.

+ Hotels are 3.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…	Success (Low / Neutral / High)	Effort (Low / Neutral / High)	Emotion (Low / Neutral / High)
Trust	17% / 34% / 69%	13% / 32% / 71%	15% / 31% / 76%
Recommend	10% / 18% / 59%	7% / 15% / 61%	8% / 18% / 65%
Forgive	18% / 29% / 56%	15% / 25% / 58%	17% / 24% / 62%
Purchase More	20% / 39% / 76%	16% / 35% / 77%	17% / 36% / 82%

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

CX and Loyalty Connections – Insurance

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in insurance brands, with their degree of *trust* 6.7x higher after a delightful versus an upsetting experience.

+ Consumers are 6.1x more likely to *forgive* an insurance brand if they deliver a bad experience after an easy experience versus after difficult one *(effort)*.

+ Insurers are 5.1x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
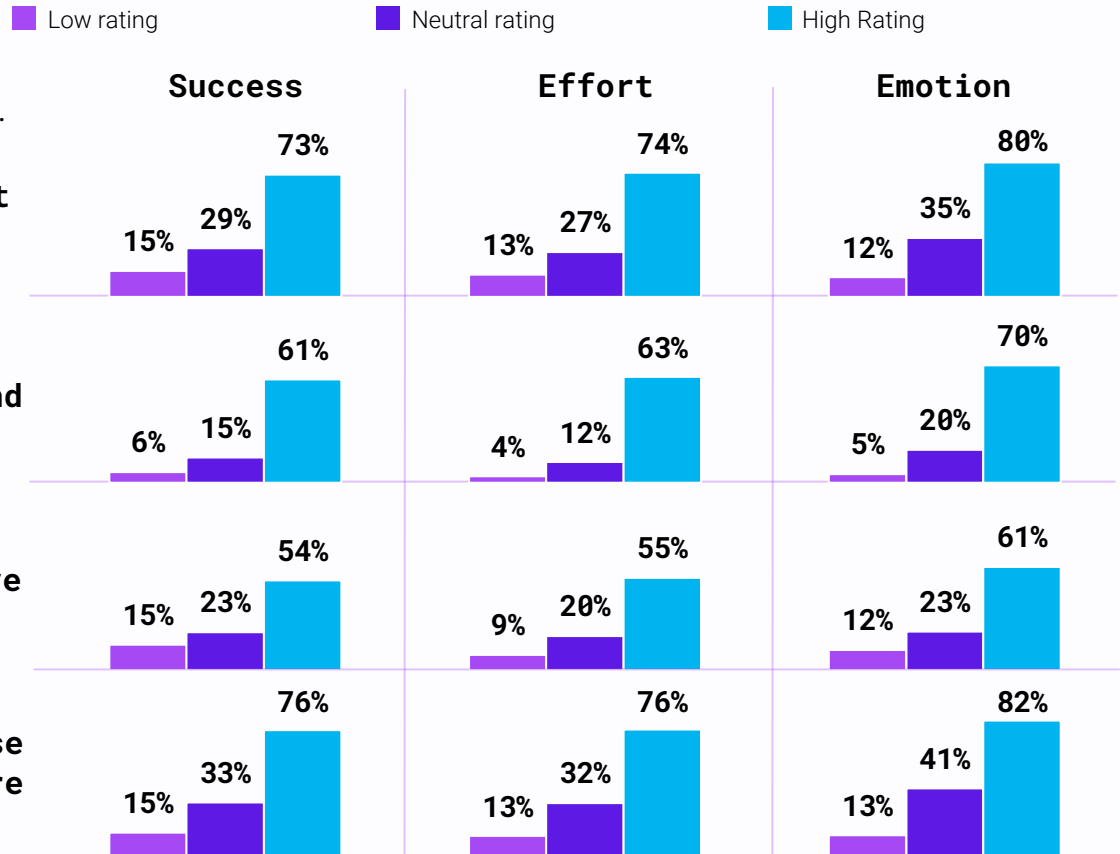
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 18 insurance brands

■ Low rating   ■ Neutral rating   ■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	15%	29%	73%	13%	27%	74%	12%	35%	80%
Recommend	6%	15%	61%	4%	12%	63%	5%	20%	70%
Forgive	15%	23%	54%	9%	20%	55%	12%	23%	61%
Purchase More	15%	33%	76%	13%	32%	76%	13%	41%	82%

CX and Loyalty Connections – Investment

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in investment brands, with their degree of *trust* 4.5x higher after an easy versus a difficult experience.

+ Consumers are 3.4x more likely to *forgive* an investment brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Investment firms are 3.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
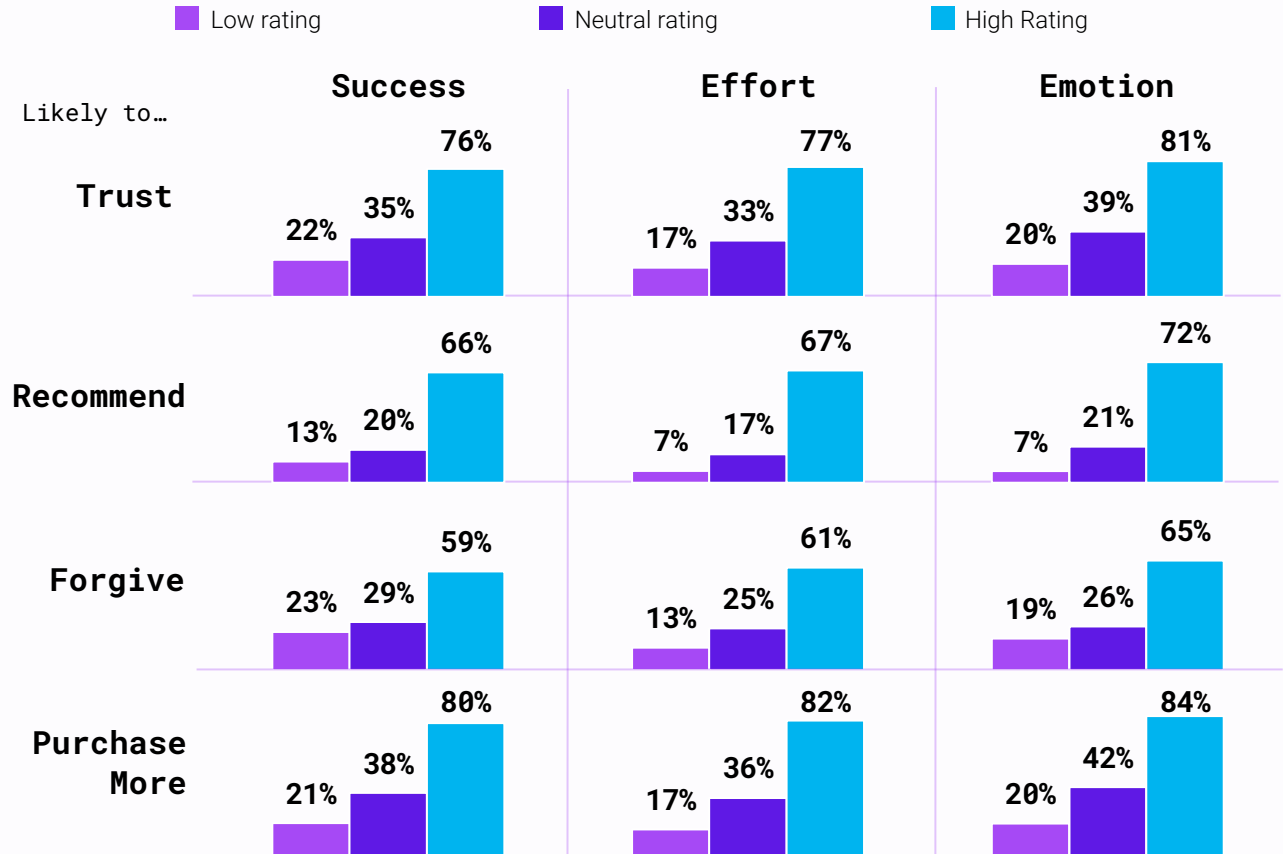
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 13 investment brands

Legend: Low rating | Neutral rating | High Rating

Likely to…

	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High	
Trust	22%	35%	76%	17%	33%	77%	20%	39%	81%	
Recommend	13%	20%	66%	7%	17%	67%	7%	21%	72%	
Forgive	23%	29%	59%	13%	25%	61%	19%	26%	65%	
Purchase More	21%	38%	80%	17%	36%	82%	20%	42%	84%	

CX and Loyalty Connections – Parcel Delivery

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in parcel delivery brands, with their degree of *trust* 5.4x higher after a delightful versus an upsetting experience.

+ Consumers are 3.0x more likely to *forgive* a parcel delivery brand if they deliver a bad experience after an easy experience versus after difficult one *(effort)*.

+ Parcel delivery brands are 4.2x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 5 parcel delivery brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…

	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Trust	21%	27%	67%	15%	25%	70%	14%	31%	76%
Recommend	10%	17%	62%	10%	15%	64%	10%	20%	71%
Forgive	20%	24%	55%	19%	23%	57%	18%	25%	62%
Purchase More	19%	35%	80%	23%	37%	82%	27%	46%	85%
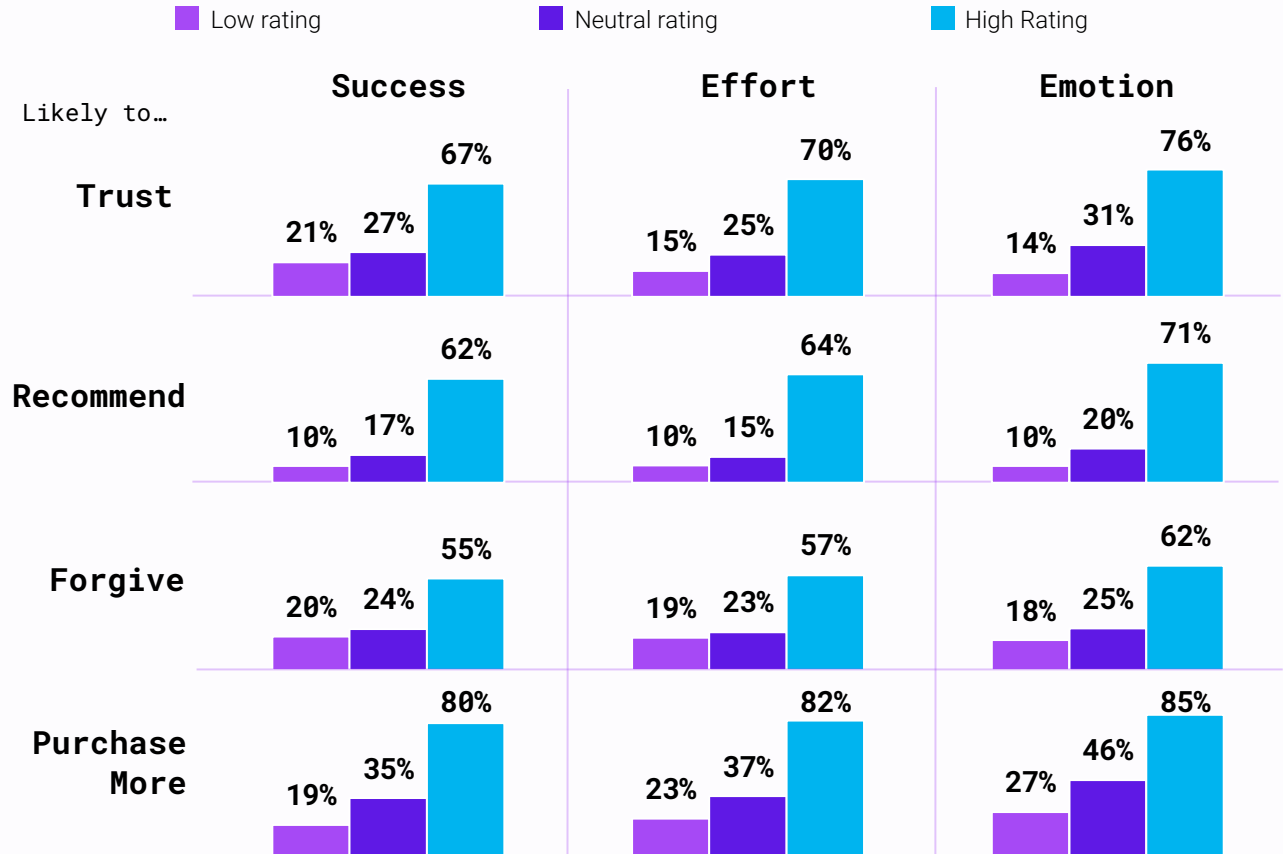
CX and Loyalty Connections – Retail

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XM institute™

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in retail brands, with their degree of *trust* 5.1x higher after a delightful versus an upsetting experience.

+ Consumers are 3.1x more likely to *forgive* a retail brand if they deliver a bad experience after an easy experience versus after difficult one *(effort)*.

+ Retailers are 3.2x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
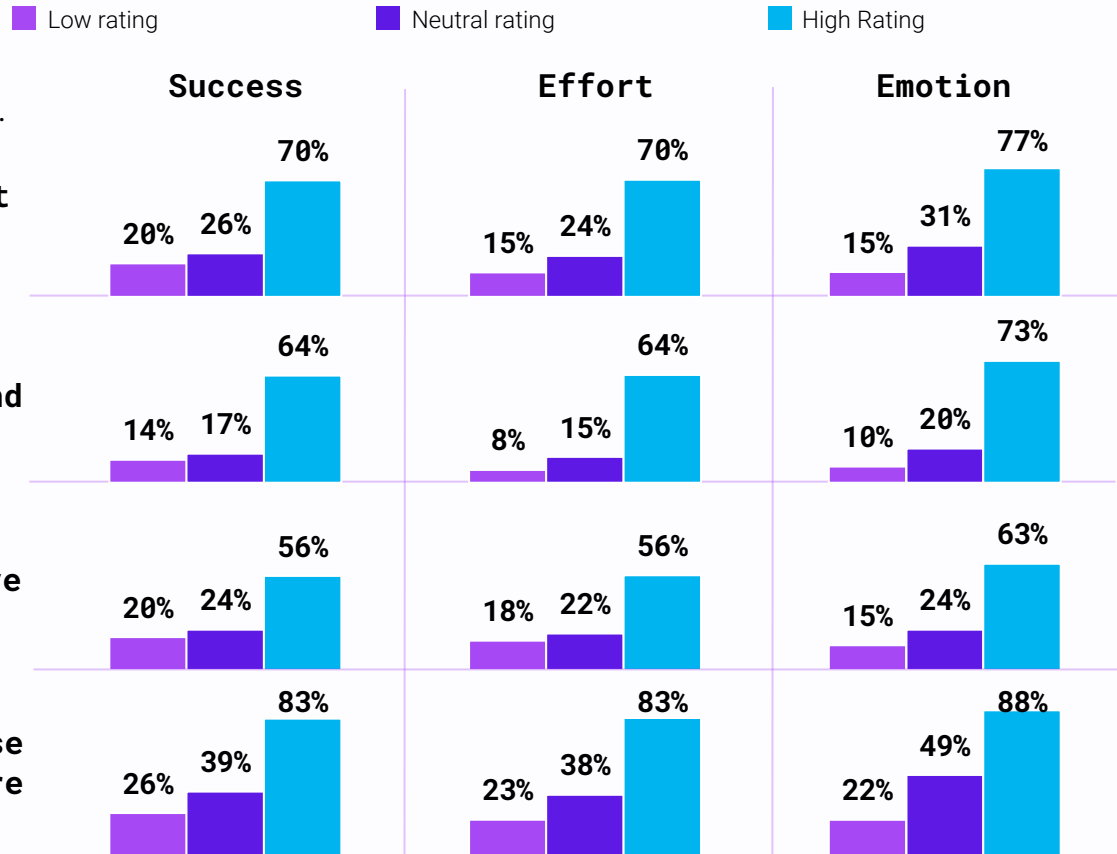
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

xminstitute.com

Consumer Loyalty based on Customer Experience Ratings
across 41 retail brands

■ Low rating   ■ Neutral rating   ■ High Rating

Likely to…

	Success	Effort	Emotion
Trust	20% / 26% / 70%	15% / 24% / 70%	15% / 31% / 77%
Recommend	14% / 17% / 64%	8% / 15% / 64%	10% / 20% / 73%
Forgive	20% / 24% / 56%	18% / 22% / 56%	15% / 24% / 63%
Purchase More	26% / 39% / 83%	23% / 38% / 83%	22% / 49% / 88%

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CX and Loyalty Connections – Software

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in software brands, with their degree of *trust* 4.2x higher after a delightful versus an upsetting experience.

+ Consumers are 3.5x more likely to *forgive* a software brand if they deliver a bad experience after an easy experience versus after difficult one *(effort)*.

+ Software brands are 3.3x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
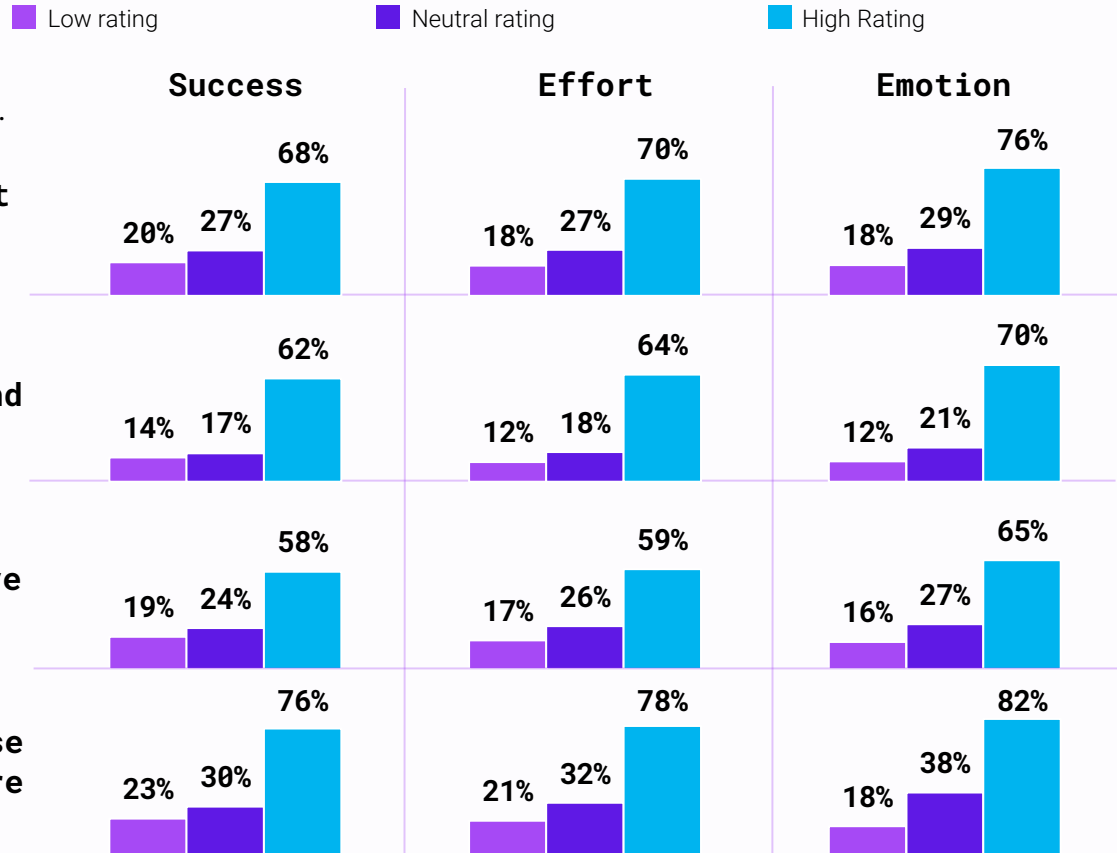
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 11 software brands

Legend: Low rating | Neutral rating | High Rating

Likely to…

	Success			Effort			Emotion		
Trust	20%	27%	68%	18%	27%	70%	18%	29%	76%
Recommend	14%	17%	62%	12%	18%	64%	12%	21%	70%
Forgive	19%	24%	58%	17%	26%	59%	16%	27%	65%
Purchase More	23%	30%	76%	21%	32%	78%	18%	38%	82%

CX and Loyalty Connections – Social Media

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in social media brands, with their degree of *trust* 4.7x higher after a delightful versus an upsetting experience.

+ Consumers are 4.0x more likely to *forgive* a social media brand if they deliver a bad experience after an easy experience versus after difficult one *(effort)*.

+ Social media brands are 3.4x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
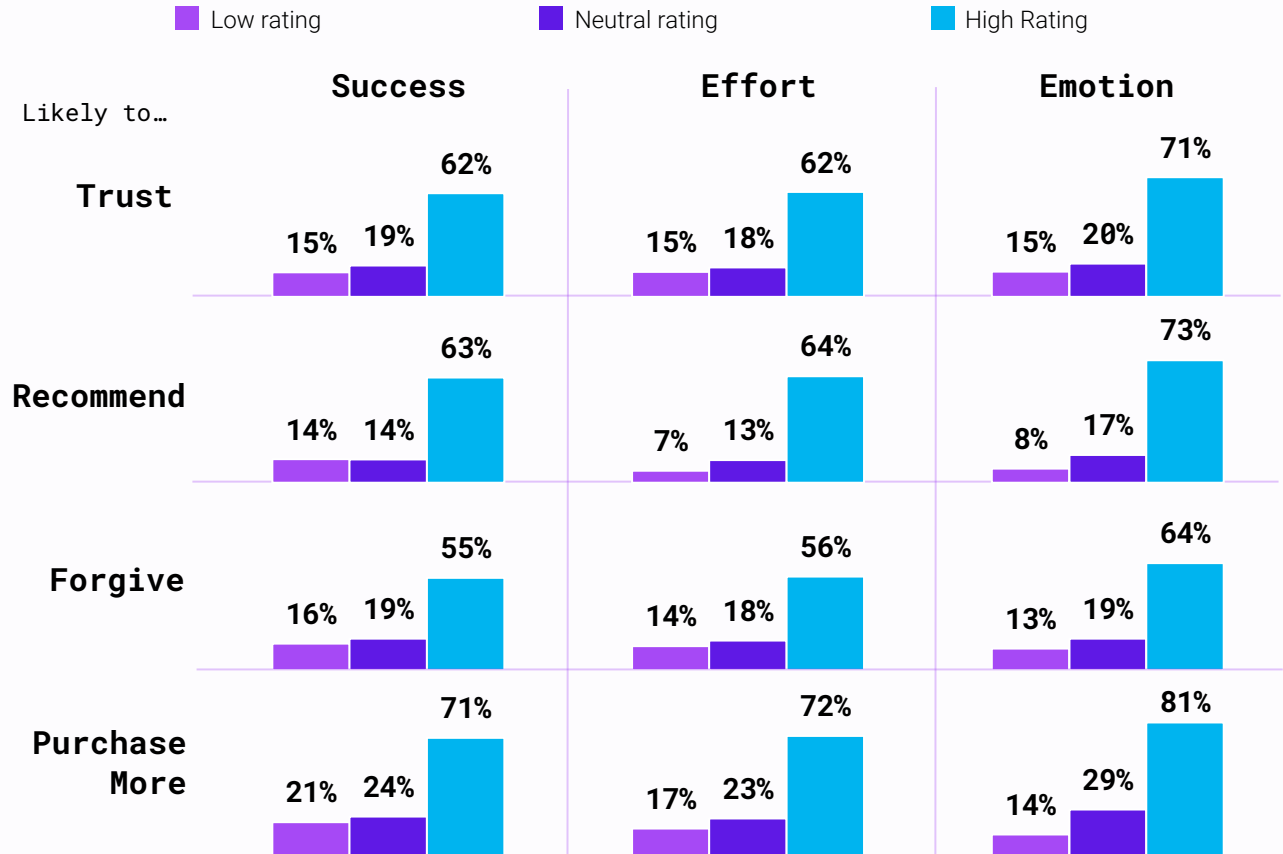
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 11 social media brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…	Success			Effort			Emotion		
	Low	Neutral	High	Low	Neutral	High	Low	Neutral	High
Trust	15%	19%	62%	15%	18%	62%	15%	20%	71%
Recommend	14%	14%	63%	7%	13%	64%	8%	17%	73%
Forgive	16%	19%	55%	14%	18%	56%	13%	19%	64%
Purchase More	21%	24%	71%	17%	23%	72%	14%	29%	81%

CX and Loyalty Connections – Streaming Media

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in streaming media brands, with their degree of *trust* 4.8x higher after an easy versus a difficult experience.

+ Consumers are 3.3x more likely to *forgive* a streaming media brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Streaming media brands are 5.5x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.
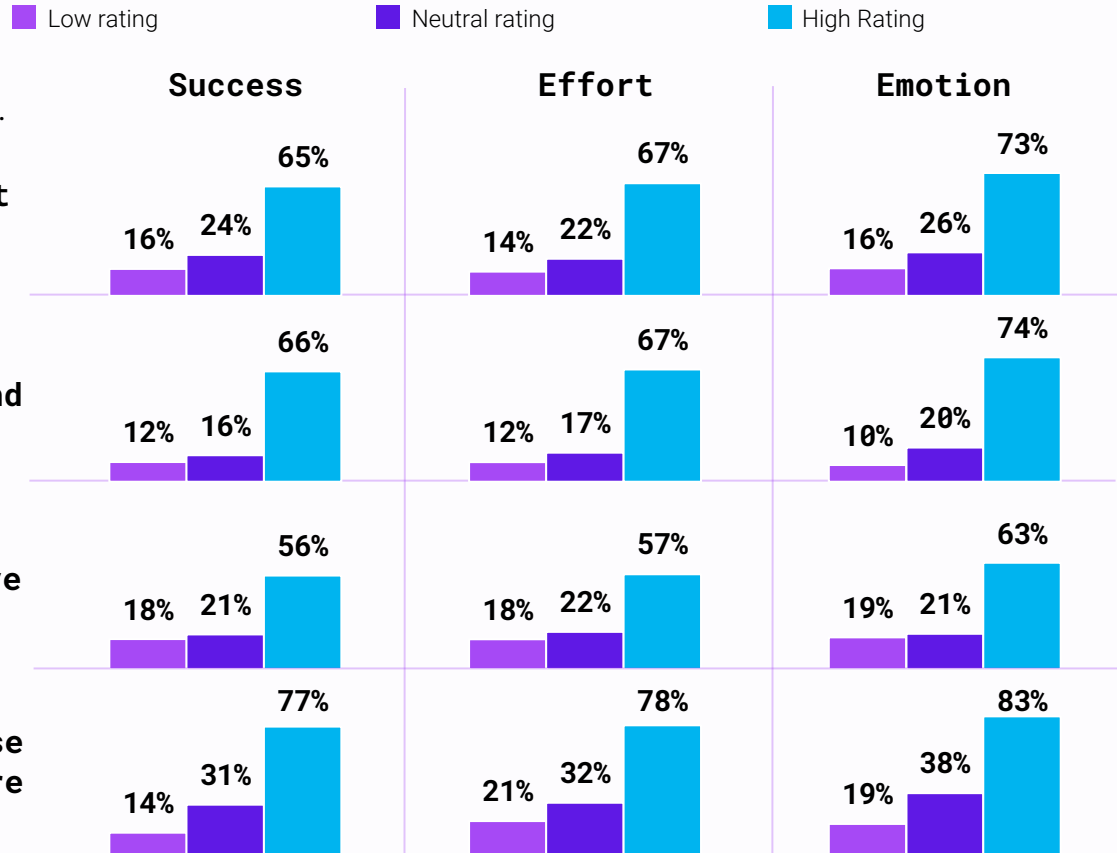
ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 20 streaming media brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	16%	24%	65%	14%	22%	67%	16%	26%	73%
Recommend	12%	16%	66%	12%	17%	67%	10%	20%	74%
Forgive	18%	21%	56%	18%	22%	57%	19%	21%	63%
Purchase More	14%	31%	77%	21%	32%	78%	19%	38%	83%

CX and Loyalty Connections – TV/Internet Service Provider

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in TV/ISP brands, with their degree of *trust* 7.6x higher after a delightful versus an upsetting experience.

+ Consumers are 3.8x more likely to *forgive* a TV/ISP brand if they deliver a bad experience after an easy experience versus after a difficult one *(effort)*.

+ TV/ISP brands are 4.4x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
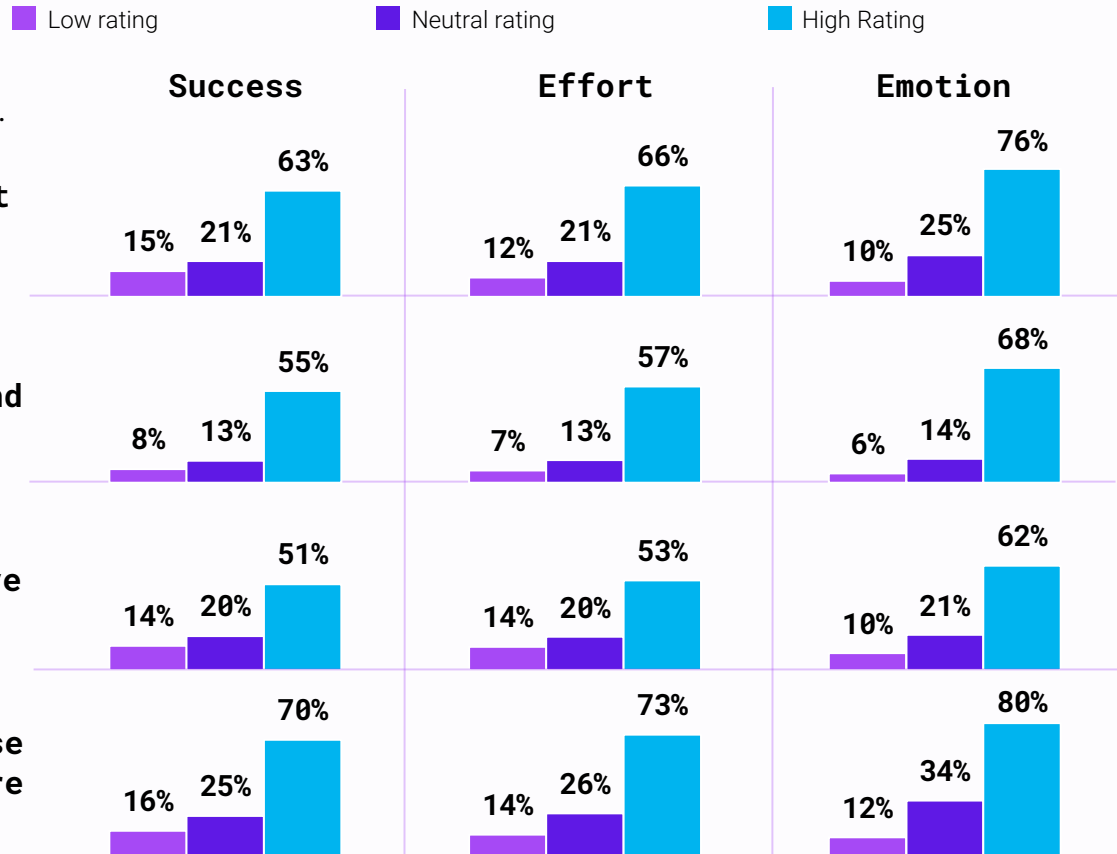**Source:** Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 9 TV/internet service brands

Legend: Low rating | Neutral rating | High Rating

Likely to…

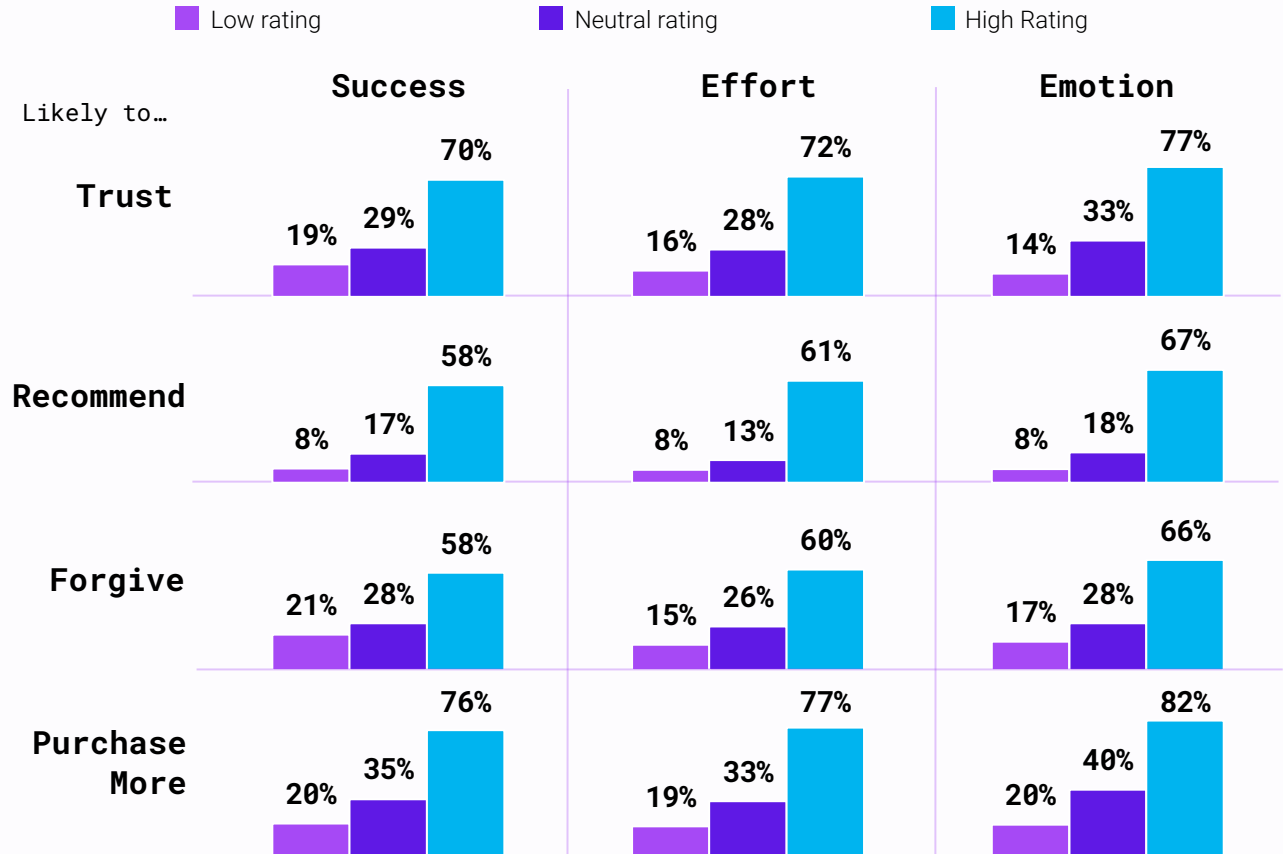|	Success			Effort			Emotion		
Trust	15%	21%	63%	12%	21%	66%	10%	25%	76%
Recommend	8%	13%	55%	7%	13%	57%	6%	14%	68%
Forgive	14%	20%	51%	14%	20%	53%	10%	21%	62%
Purchase More	16%	25%	70%	14%	26%	73%	12%	34%	80%

CX and Loyalty Connections – Utilities

KEY TAKEAWAYS

+ Consumers' *emotion* rating has the highest impact on their *trust* in utilities brands, with their degree of *trust* 5.5x higher after a delightful versus an upsetting experience.

+ Consumers are 4x more likely to *forgive* a utilities brand if they deliver a bad experience after an easy experience versus after a difficult one *(effort)*.

+ Utilities brands are 3.8x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
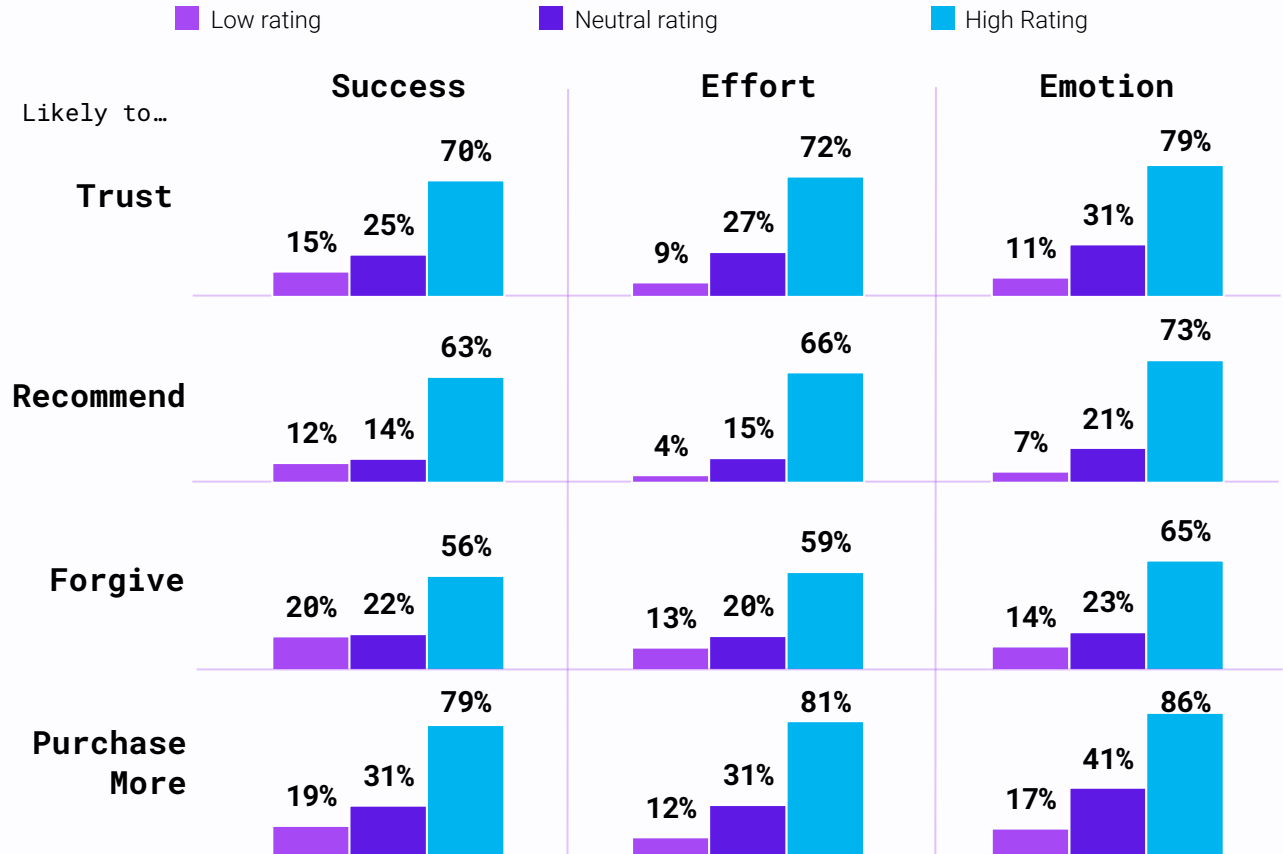### across 21 utilities brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	19%	29%	70%	16%	28%	72%	14%	33%	77%
Recommend	8%	17%	58%	8%	13%	61%	8%	18%	67%
Forgive	21%	28%	58%	15%	26%	60%	17%	28%	66%
Purchase More	20%	35%	76%	19%	33%	77%	20%	40%	82%

CX and Loyalty Connections – Wireless

KEY TAKEAWAYS

+ Consumers' *effort* rating has the highest impact on their *trust* in wireless brands, with their degree of *trust* 8.0x higher after an easy versus a difficult experience.

+ Consumers are 4.6x more likely to *forgive* a wireless brand if they deliver a bad experience after a delightful experience versus after an upsetting one *(emotion)*.

+ Wireless brands are 4.2x more likely to have customers return to *purchase more* after delivering successful experiences rather than after failed experiences.

ABOUT

Base: 10,000 US consumers
Source: Qualtrics XM Institute Q3 2023 US Consumer Study

Consumer Loyalty based on Customer Experience Ratings
across 10 wireless brands

Legend: ■ Low rating ■ Neutral rating ■ High Rating

Likely to…

	Success			Effort			Emotion		
Trust	15%	25%	70%	9%	27%	72%	11%	31%	79%
Recommend	12%	14%	63%	4%	15%	66%	7%	21%	73%
Forgive	20%	22%	56%	13%	20%	59%	14%	23%	65%
Purchase More	19%	31%	79%	12%	31%	81%	17%	41%	86%

Methodology

DATA CALCULATION

In **Figures 3-25**, for each customer experience component we took the number of low, neutral, and high ratings in that industry that also had high loyalty ratings and divided it by the total number of low, neutral, and high component ratings. E.g., We took the number of low, neutral, and high *success* ratings airline responses that also rated the airline highly for *trust* an and divided those three numbers by the total number of low, neutral, and high *success* responses in the airline industry, respectively.

In **Figure 2**, we take the average across all 22 industries for each respective CX metric x Loyalty metric measurement.

See **Figure 1** for a full breakdown of measurement questions and what constitutes a "low", "neutral", and "high" rating.

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