



DATA SNAPSHOT

# Global Study: ROI of Customer Experience, 2024

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# Executive Summary

## KEY FINDINGS IN THIS REPORT

As part of Qualtrics XM Institute's 2023 Global Consumer Study, 28,400 consumers 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. Through our analysis, we learned that:

- + **Consumer satisfaction impacts key loyalty behaviors.** Satisfaction has a very high correlation with consumers' likelihood to trust, recommend, and purchase more.
- + **Consumers' likelihood to recommend and trust similarly relate to consumer satisfaction.** Compared to after a 1-2- star experience, after a 5-star experience, consumers are 2.9x more likely to trust and 3.0x more likely to recommend an organization yet are only 2.2x more likely to purchase more.
- + **The impact of satisfaction on loyalty varies by country.** Satisfaction has the least impact on loyalty in the United Arab Emirates, where after a 5-star experience consumers are only 1.5x more likely to recommend and purchase more, and only 1.7x more likely to trust compared to their dissatisfied peers. Comparatively, after a very satisfying experience Italian consumers are 4.1x more likely to trust, UK consumers are 5.8x more likely to recommend, and Thai consumers are 2.8x more likely to purchase more.
- + **Unsatisfying experiences impact government agencies' loyalty metrics the most.** Across all industries, consumers are least likely to trust, recommend, and purchase more after 1-2- star government agency experiences, with 25% or fewer likely to perform any of these activities.
- + **Hotels earn loyalty after very satisfying experiences.** After 5-star experiences, consumers are most likely to trust (90%) and recommend (91%) a hotel. On the other end of the spectrum, just 80% of property insurance consumers are likely to say the same.

## STUDY KEY FACTS

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

# Global Study: ROI of Customer Experience, 2024

## 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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## Methodology

# ROI: CX Correlates with Trust

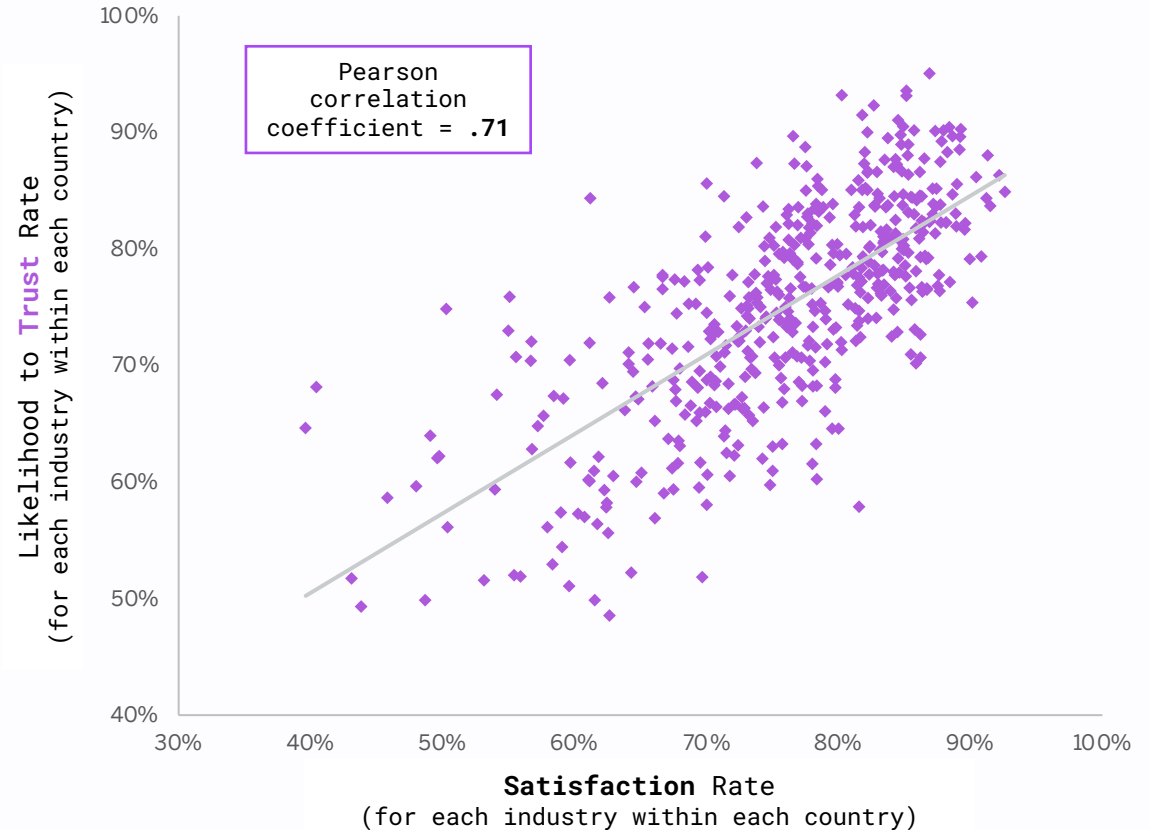
## KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.71, there is a very high correlation between customer experience (CX) and likelihood to trust.

### ABOUT

Base: 28,400 consumers across 26 countries  
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study  
[xminstitute.com](https://www.xminstitute.com)

**Industry satisfaction rates within each country  
correlate with likelihood to trust rates**  
28 countries across 20 industries, 480 data points

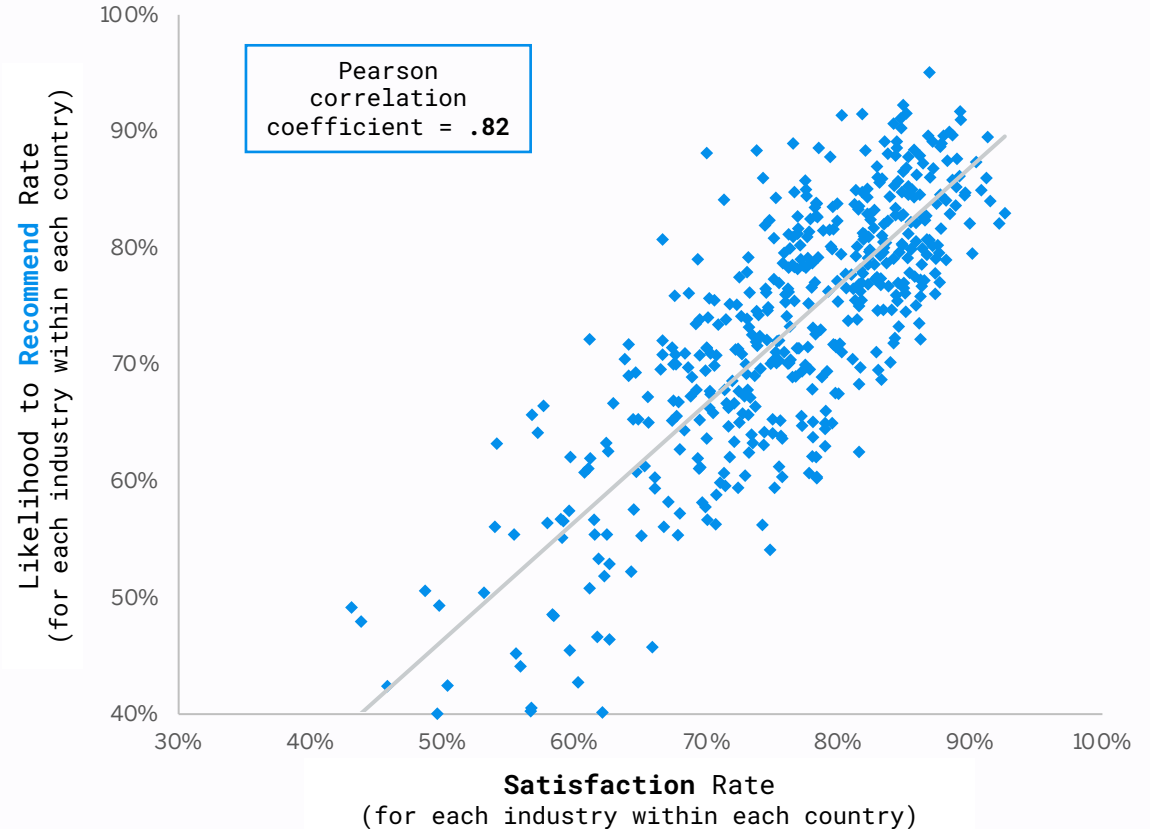


# ROI: CX Correlates with Advocacy

## KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.82, there is a very high correlation between customer experience (CX) and likelihood to recommend.

**Industry satisfaction rates within each country  
correlate with likelihood to recommend rates**  
28 countries across 20 industries, 480 data points



## ABOUT

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# ROI: CX Correlates with Rebuying

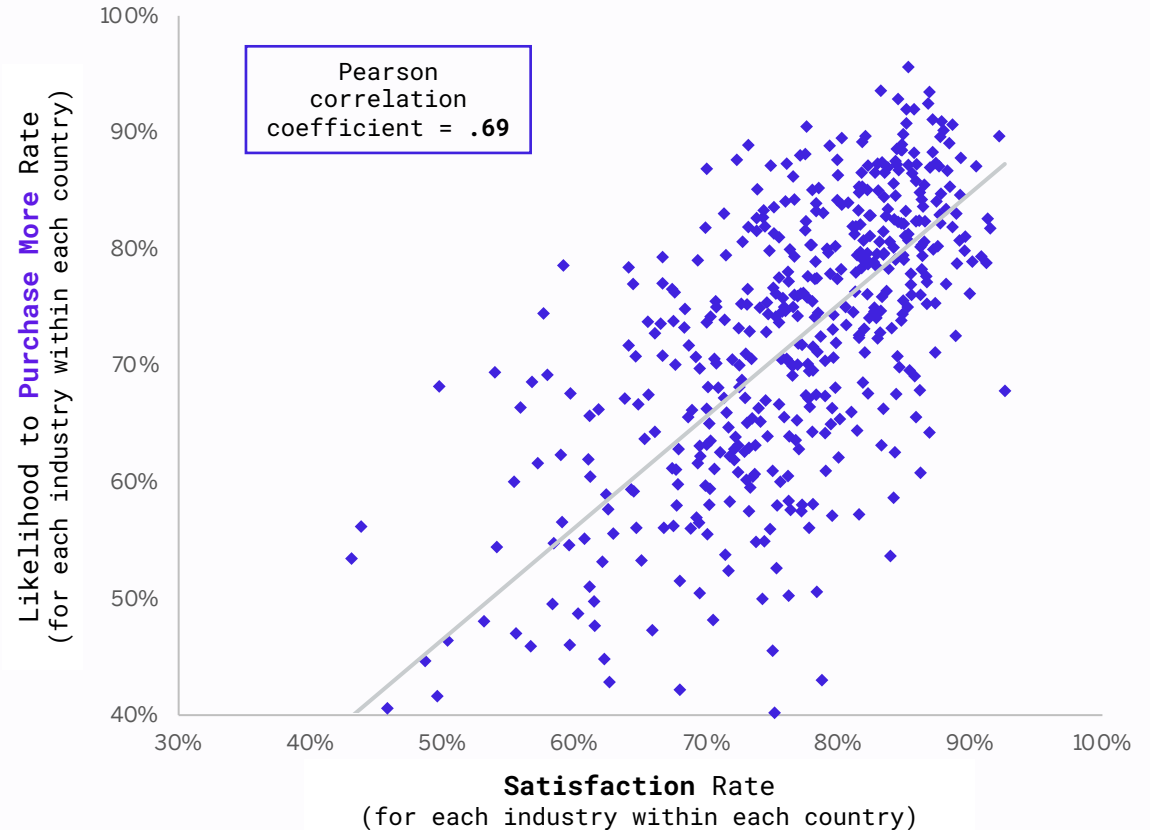
## KEY TAKEAWAYS

- + With a Pearson correlation coefficient of 0.69, there is a very high correlation between customer experience (CX) and likelihood to purchase more.

### ABOUT

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[xminstitute.com](https://www.xminstitute.com)

**Industry satisfaction rates within each country correlate with likelihood to purchase more rates**  
28 countries across 20 industries, 480 data points



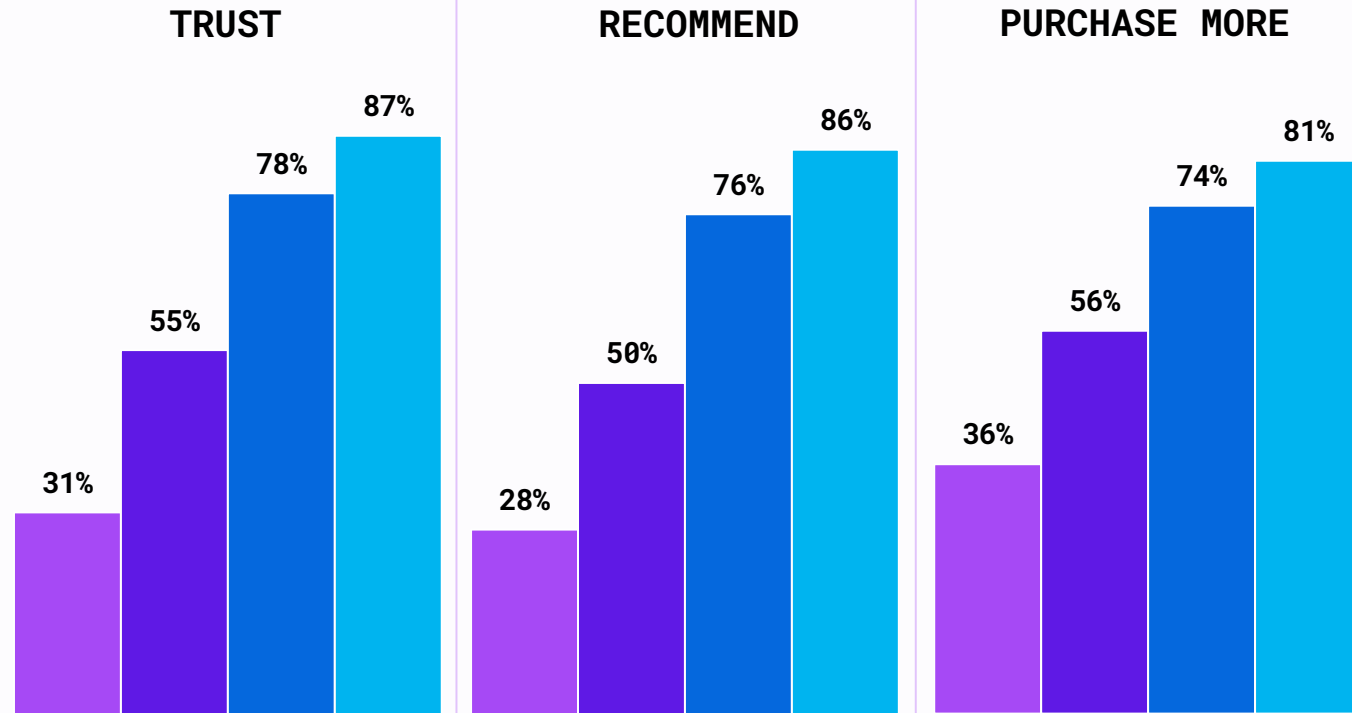
# CX and Loyalty Connections – Overall

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

## KEY TAKEAWAYS

- + Consumers are 2.9x more likely to trust after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 58 points less likely to recommend an organization to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.2x more likely to purchase more from an organization after a high satisfying versus after an unsatisfying experience.

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



## ABOUT

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

# CX and Trust Connections by Industry

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

## KEY TAKEAWAYS

- + Consumers are most likely to trust after 5-star hotel and hospital/medical clinic experiences, with 90% likely to do so.
- + Government agencies engender the least amount of trust after 1-2-star experiences, with just 18% likely to trust after such an experience. Meanwhile, department stores enjoy the greatest amount of trust after low satisfaction experiences.

	1-2 stars	3 stars	4 stars	5 stars
Airline	30%	62%	83%	89%
Auto dealer	38%	51%	<b>74%</b>	85%
Bank	30%	53%	77%	87%
College/ University	45%	<b>64%</b>	82%	88%
Credit Card Provider	30%	53%	77%	85%
Department Store	<b>46%</b>	60%	80%	88%
Electronics	42%	<b>64%</b>	79%	88%
Fast Food	29%	50%	75%	86%
Government Agency	<b>18%</b>	50%	77%	82%
Health Insurance	30%	57%	79%	87%
Hospital/Medical Clinic	35%	62%	82%	<b>90%</b>
Hotel	42%	62%	<b>84%</b>	<b>90%</b>
Internet Service Provider	28%	53%	77%	87%
Mobile Phone Provider	25%	<b>49%</b>	75%	84%
Online Retailer	29%	51%	76%	87%
Parcel Delivery	22%	50%	77%	88%
Property Insurance	39%	54%	75%	<b>80%</b>
Public Utility	28%	53%	79%	86%
Streaming	36%	52%	76%	86%
Supermarket	42%	57%	82%	89%

## ABOUT

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



# CX and Advocacy Connections by Industry

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

## KEY TAKEAWAYS

- + Consumers are least likely to recommend government agencies after experiences of all levels of satisfaction.
- + Airlines and hotels receive the greatest amount of consumer advocacy after 5-star experiences (91%).

	Percentage of consumers <i>somewhat or very likely</i> to RECOMMEND based on satisfaction rating			
	1-2 stars	3 stars	4 stars	5 stars
Airline	32%	60%	82%	<b>91%</b>
Auto dealer	42%	51%	76%	85%
Bank	23%	<b>42%</b>	72%	83%
College/ University	39%	57%	80%	87%
Credit Card Provider	29%	47%	72%	82%
Department Store	<b>44%</b>	58%	79%	87%
Electronics	<b>44%</b>	<b>65%</b>	80%	90%
Fast Food	29%	48%	76%	87%
Government Agency	<b>16%</b>	<b>42%</b>	<b>69%</b>	<b>80%</b>
Health Insurance	29%	55%	76%	86%
Hospital/Medical Clinic	25%	49%	73%	84%
Hotel	40%	61%	<b>83%</b>	<b>91%</b>
Internet Service Provider	24%	51%	76%	86%
Mobile Phone Provider	27%	50%	74%	84%
Online Retailer	31%	52%	78%	87%
Parcel Delivery	20%	47%	73%	84%
Property Insurance	35%	52%	75%	<b>80%</b>
Public Utility	22%	44%	72%	83%
Streaming	39%	54%	78%	88%
Supermarket	41%	49%	76%	87%

## ABOUT

Base: 28,400 consumers across 26 countries  
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# CX and Rebuying Connections by Industry

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

## KEY TAKEAWAYS

+ Consumers are most likely to purchase more from supermarkets after 1-4- star experiences and are most likely to purchase more from airlines and electronics makers after 5-star experiences.

	Percentage of consumers <i>somewhat or very likely</i> to PURCHASE MORE based on satisfaction rating			
	1-2 stars	3 stars	4 stars	5 stars
Airline	44%	66%	82%	<b>87%</b>
Auto dealer	44%	55%	72%	80%
Bank	31%	<b>43%</b>	<b>62%</b>	70%
College/ University	37%	49%	69%	78%
Credit Card Provider	31%	50%	71%	76%
Department Store	50%	66%	81%	85%
Electronics	50%	66%	79%	<b>87%</b>
Fast Food	38%	59%	79%	86%
Government Agency	<b>25%</b>	45%	63%	73%
Health Insurance	36%	58%	72%	81%
Hospital/Medical Clinic	34%	48%	<b>62%</b>	<b>69%</b>
Hotel	43%	60%	79%	86%
Internet Service Provider	35%	57%	74%	80%
Mobile Phone Provider	32%	52%	69%	77%
Online Retailer	40%	64%	81%	86%
Parcel Delivery	33%	57%	76%	84%
Property Insurance	34%	52%	72%	77%
Public Utility	42%	57%	74%	78%
Streaming	43%	58%	75%	83%
Supermarket	<b>52%</b>	<b>67%</b>	<b>83%</b>	86%

## ABOUT

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# CX and Loyalty Connections – Airline

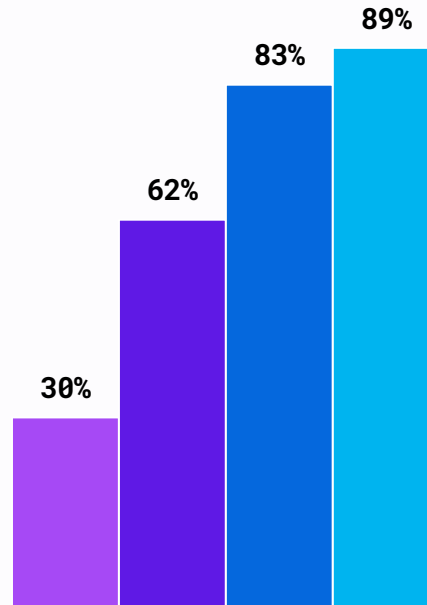
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

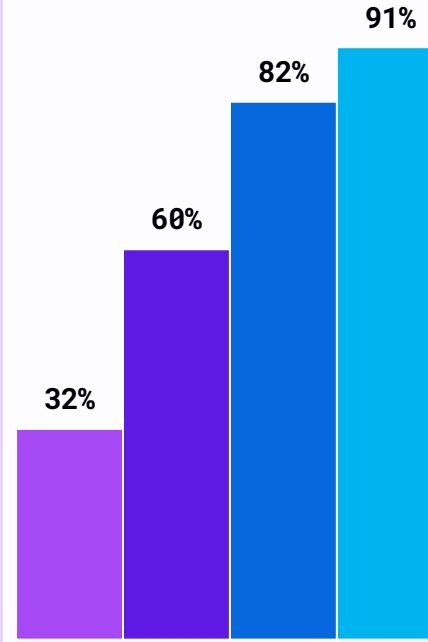
- + Consumers are 2.9x more likely to trust an airline after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 59 points less likely to recommend an airline to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.0x more likely to purchase more from an airline after a high satisfying experience versus after an unsatisfying experience.

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

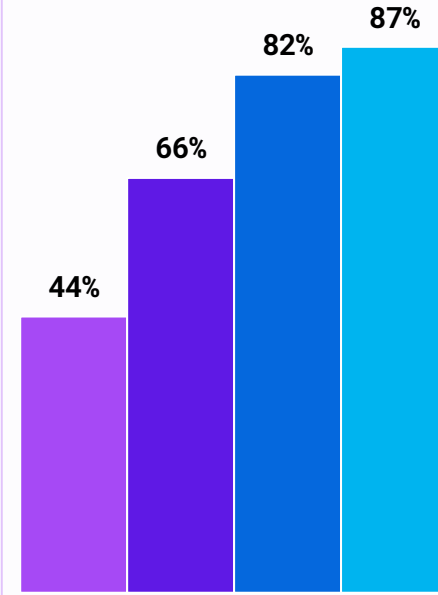
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

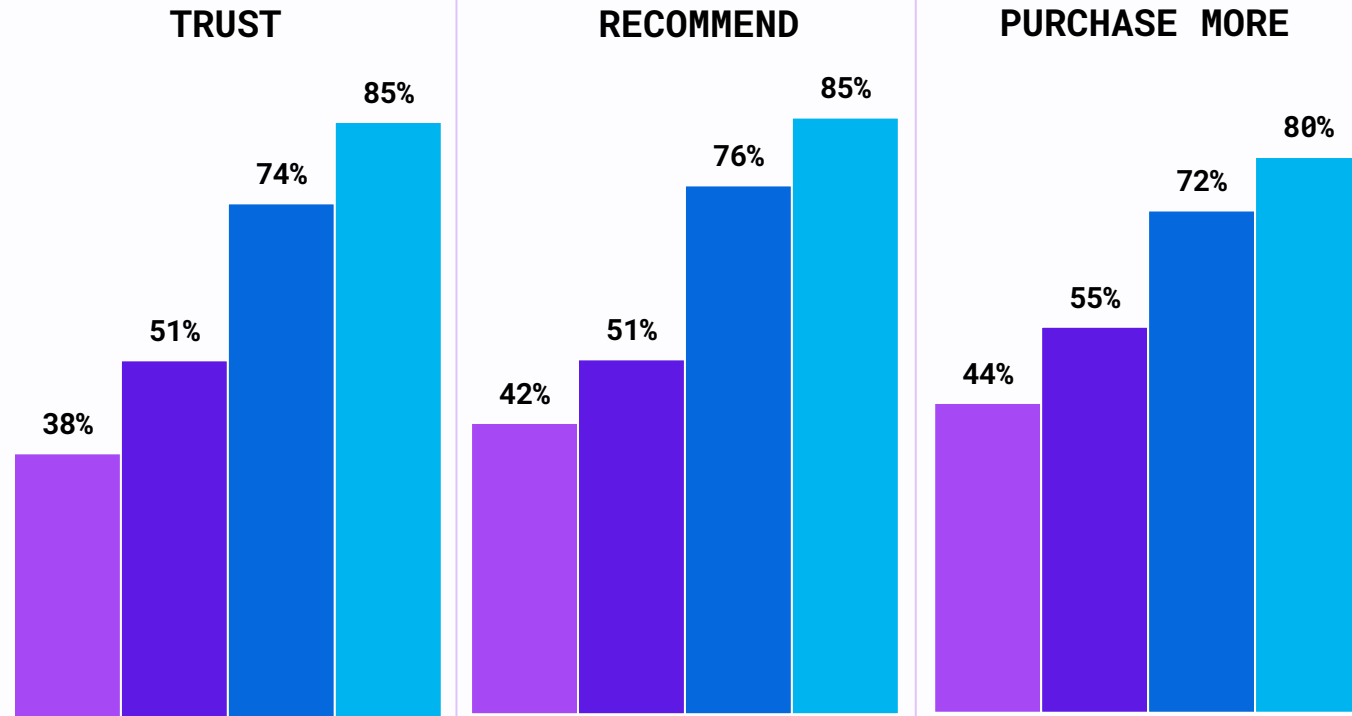
# CX and Loyalty Connections – Auto Dealer

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

## KEY TAKEAWAYS

- + Consumers are 2.3x more likely to trust an auto dealer after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 43 points less likely to recommend an auto dealer to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 1.8x more likely to purchase more from an auto dealer after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

# CX and Loyalty Connections – Banking

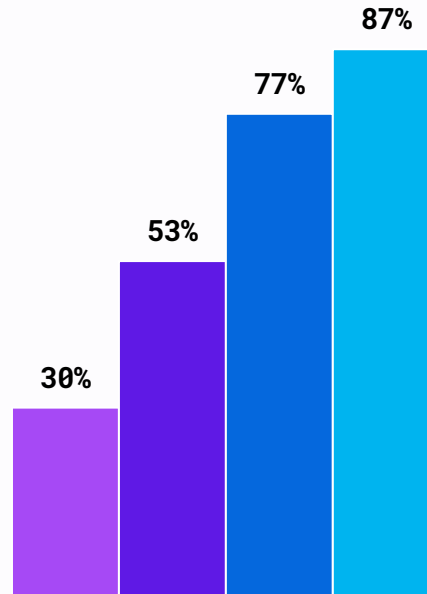
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

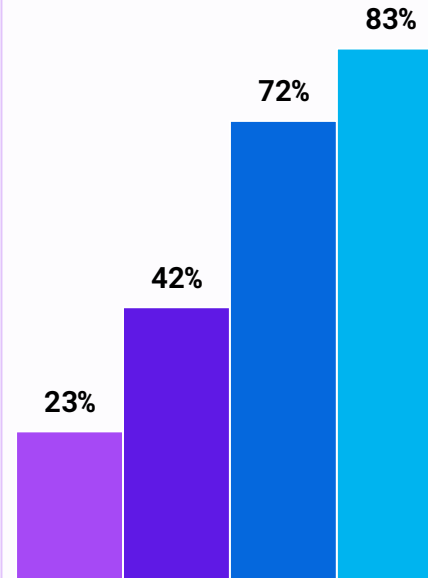
- + Consumers are 2.9x more likely to trust a bank after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 60 points less likely to recommend a bank to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.3x more likely to purchase more from a bank after a high satisfying experience versus after an unsatisfying experience.

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

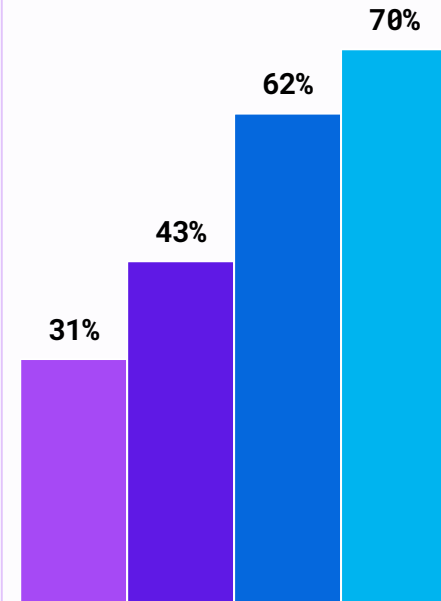
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

Base: 28,400 consumers across 26 countries  
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# CX and Loyalty Connections – College/University

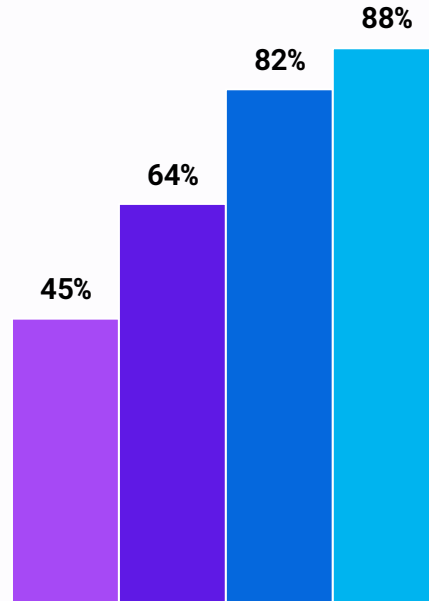
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

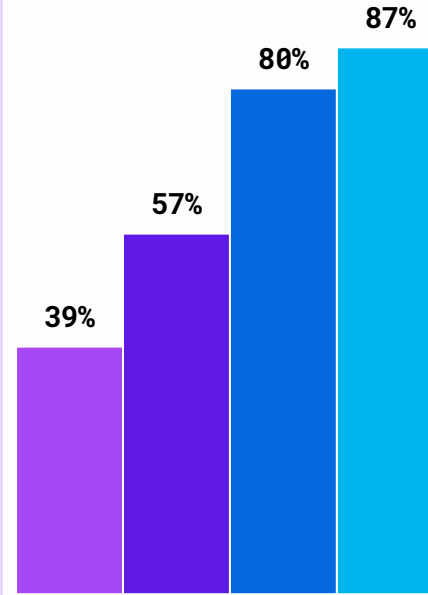
- + Consumers are 1.9x more likely to trust a college/university after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 47 points less likely to recommend a college/university to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.1x more likely to purchase more from a college/university after a high satisfying experience versus after an unsatisfying experience.

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

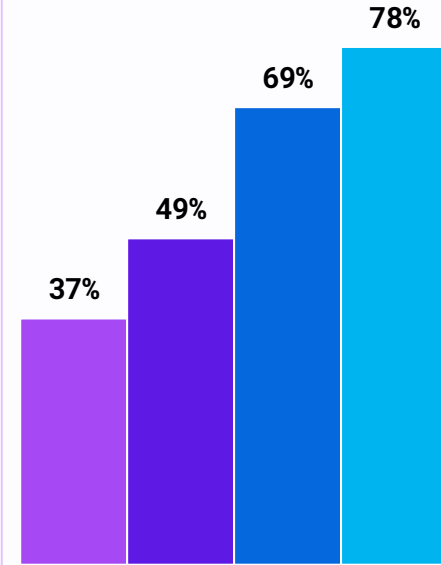
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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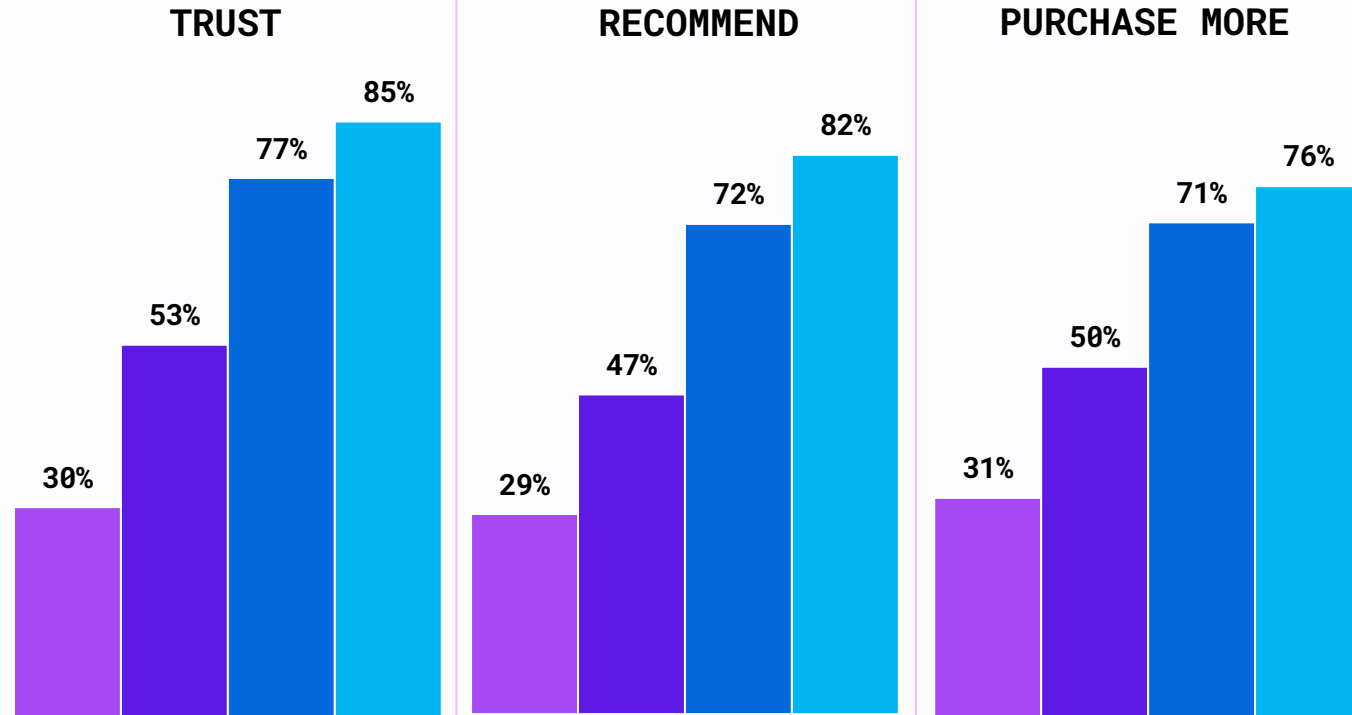
# CX and Loyalty Connections – Credit Card Provider

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

## KEY TAKEAWAYS

- + Consumers are 2.8x more likely to trust a credit card provider after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 54 points less likely to recommend a credit card provider to friends or family after a 1-2-star experience versus after a 5-star experience.
- + Consumers are 2.4x more likely to purchase more from a credit card provider after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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

# CX and Loyalty Connections – Department Store

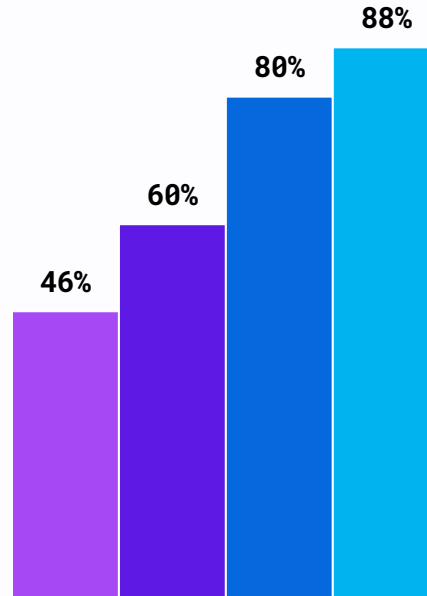
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

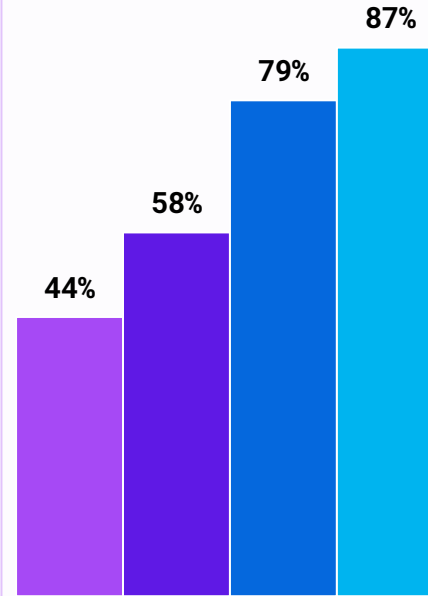
- + Consumers are 1.9x more likely to trust a department store after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 43 points less likely to recommend a department store to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 1.7x more likely to purchase more from a department store after a high satisfying experience versus after an unsatisfying experience.

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

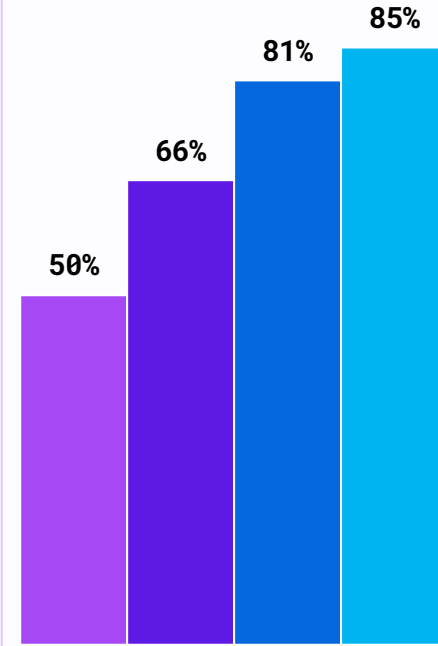
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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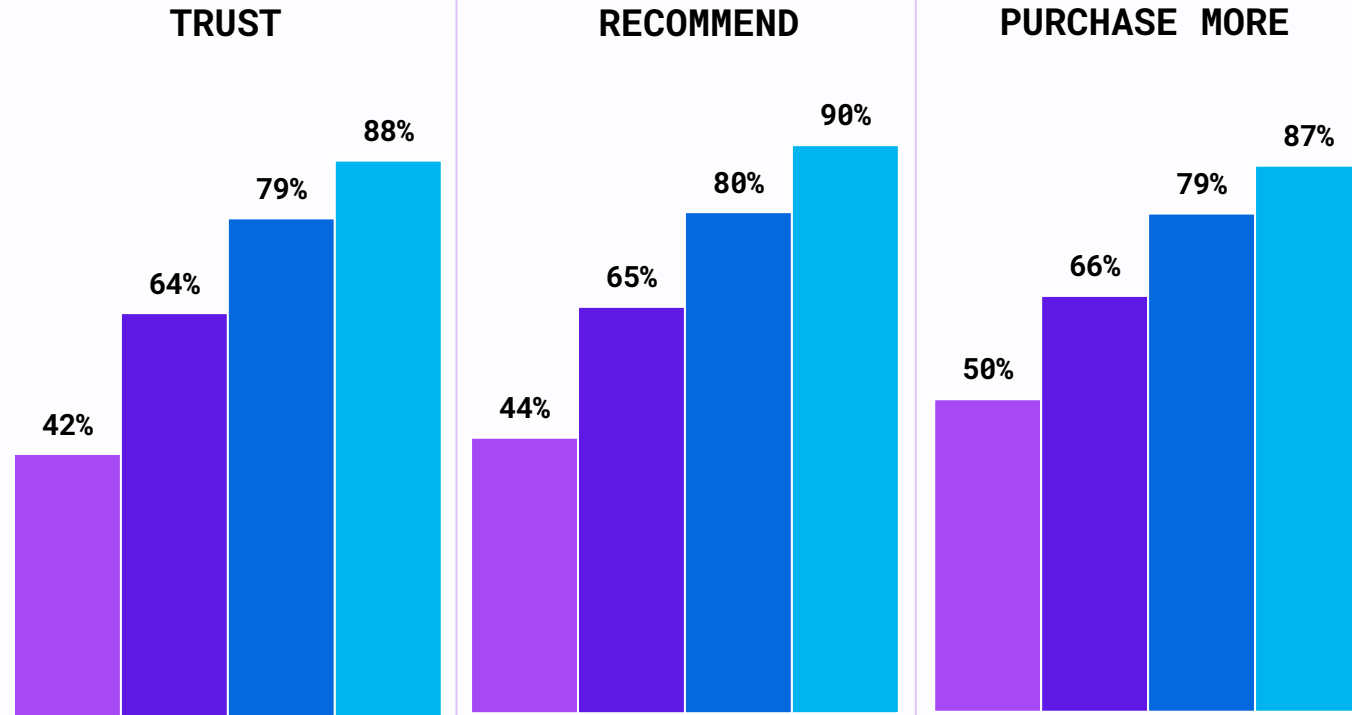
# CX and Loyalty Connections – Electronics

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

## KEY TAKEAWAYS

- + Consumers are 2.1x more likely to trust an electronics company after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 46 points less likely to recommend an electronics company to friends or family after a 1-2- star experience versus after a 5- star experience.
- + Consumers are 1.7x more likely to purchase more from an electronics company after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

Base: 28,400 consumers across 26 countries  
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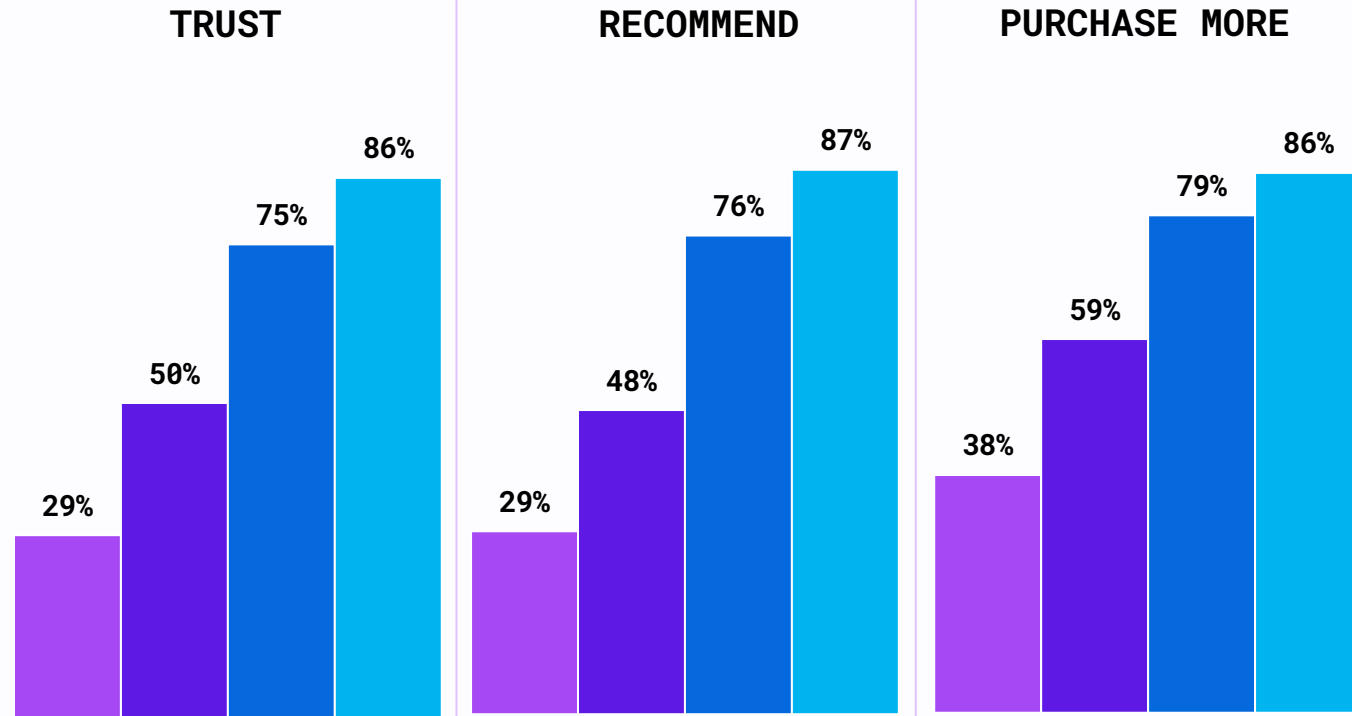
# CX and Loyalty Connections – Fast Food

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

## KEY TAKEAWAYS

- + Consumers are 3.0x more likely to trust a fast food restaurant after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 58 points less likely to recommend a fast food restaurant to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.3x more likely to purchase more from a fast food restaurant after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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

# CX and Loyalty Connections – Government Agency

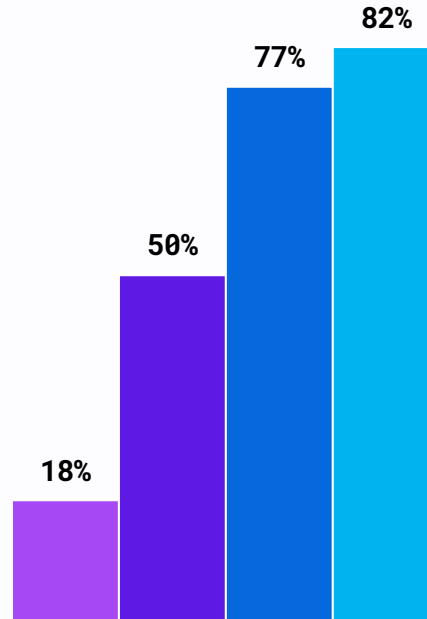
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

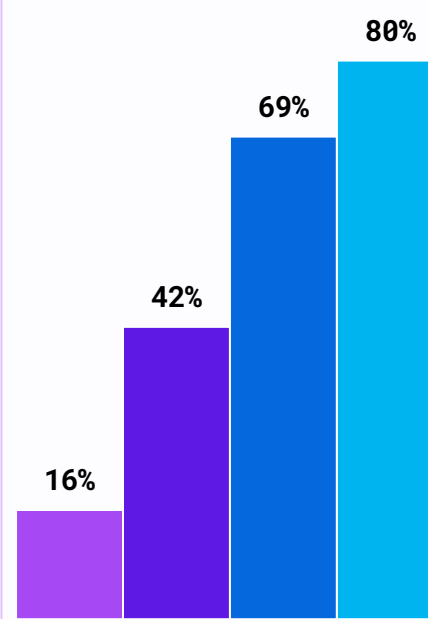
- + Consumers are 4.7x more likely to trust a government agency after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 64 points less likely to recommend a government agency to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.9x more likely to purchase more from a government agency after a high satisfying experience versus after an unsatisfying experience.

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

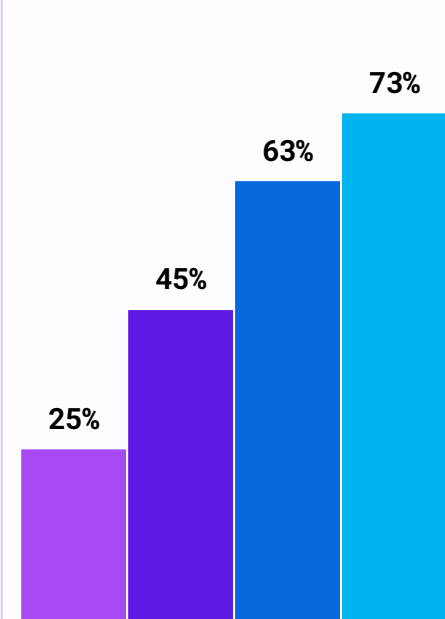
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

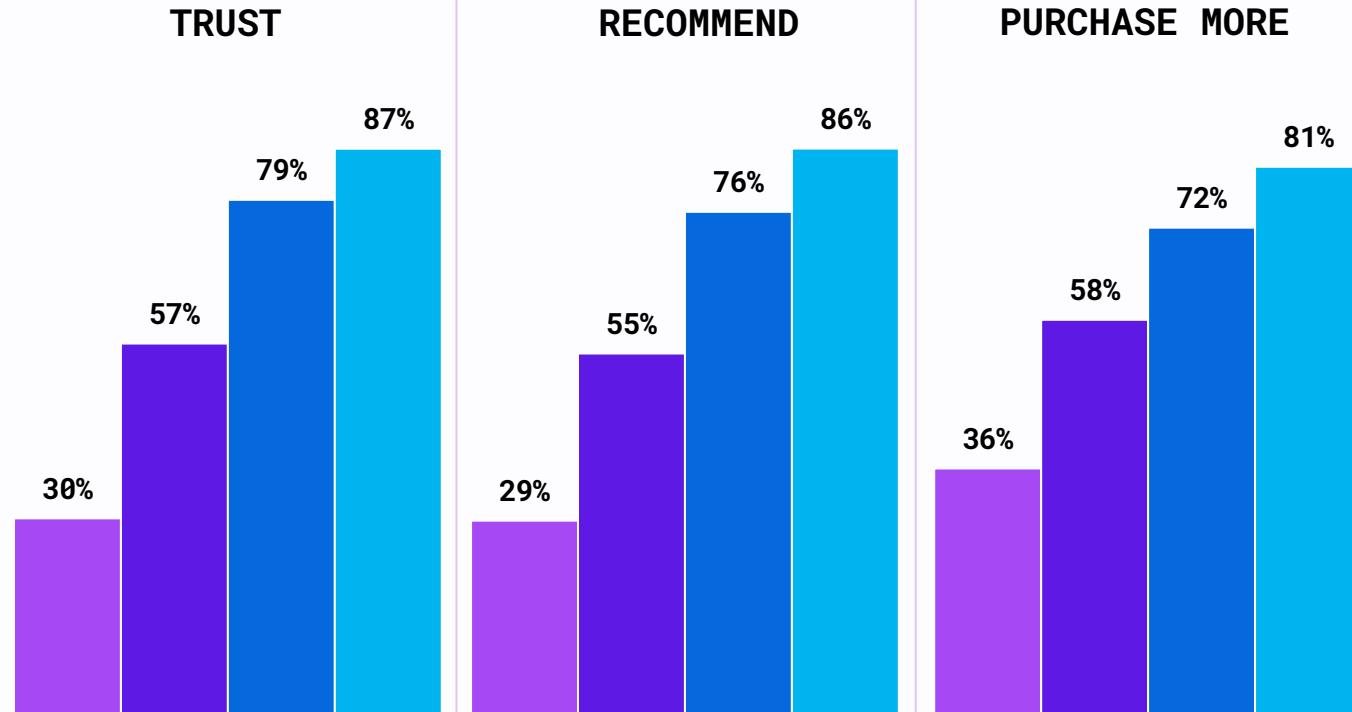
# CX and Loyalty Connections – Health Insurance

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

## KEY TAKEAWAYS

- + Consumers are 2.9x more likely to trust a health insurer after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 55 points less likely to recommend a health insurer to friends or family after a 1-2-star experience versus after a 5-star experience.
- + Consumers are 2.2x more likely to purchase more from a health insurer after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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

# CX and Loyalty Connections – Hospital/Medical Clinic

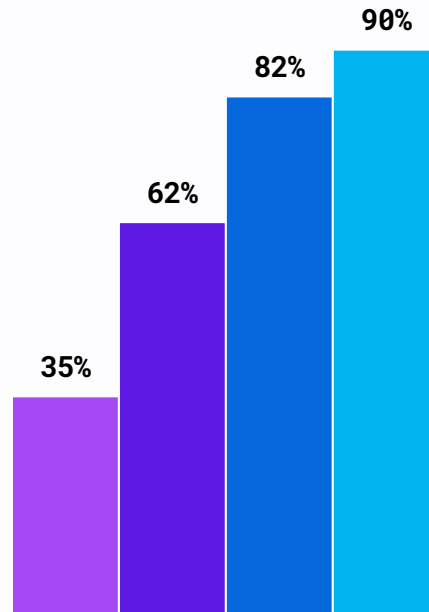
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

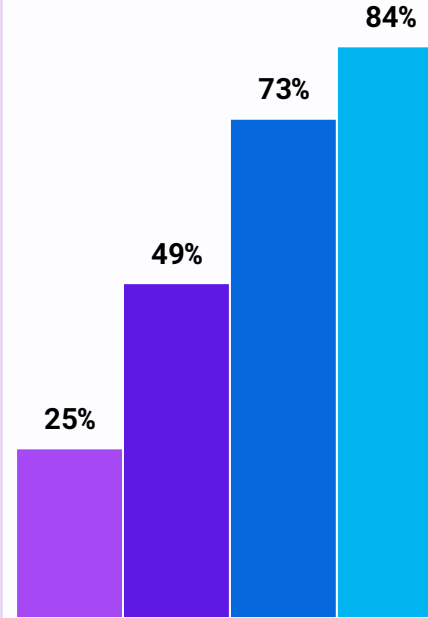
- + Consumers are 2.6x more likely to trust a hospital/medical clinic after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 59 points less likely to recommend a hospital/medical clinic to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.0x more likely to purchase more from a hospital/medical clinic after a high satisfying experience versus after an unsatisfying experience.

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

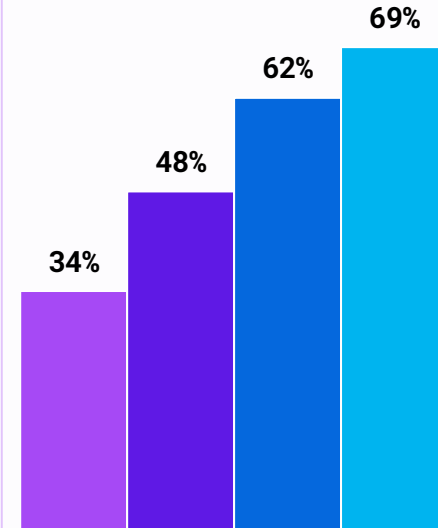
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

# CX and Loyalty Connections – Hotel

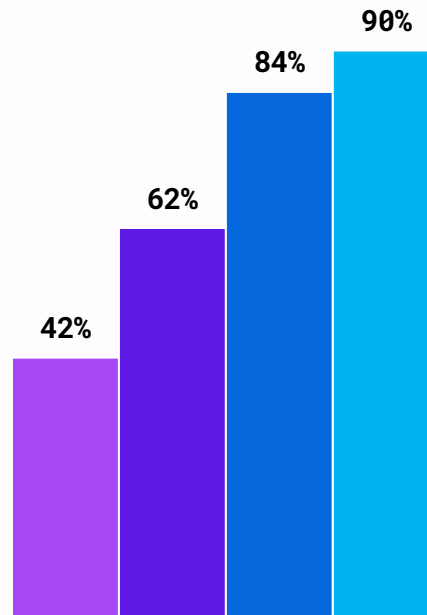
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

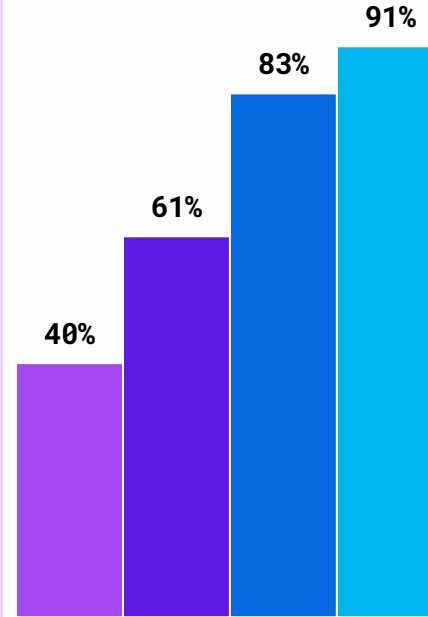
- + Consumers are 2.2x more likely to trust a hotel after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 51 points less likely to recommend a hotel to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.0x more likely to purchase more from a hotel after a high satisfying experience versus after an unsatisfying experience.

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

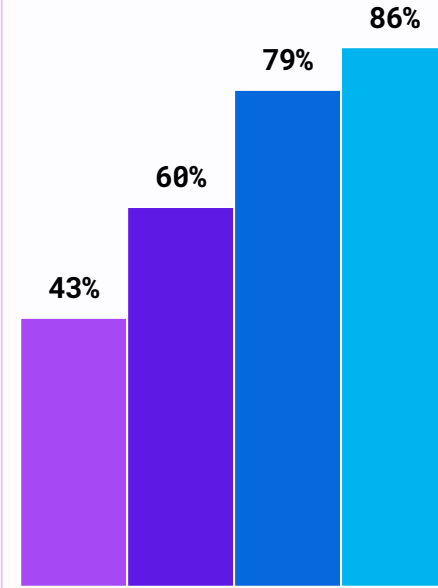
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

# CX and Loyalty Connections – Internet Service Provider

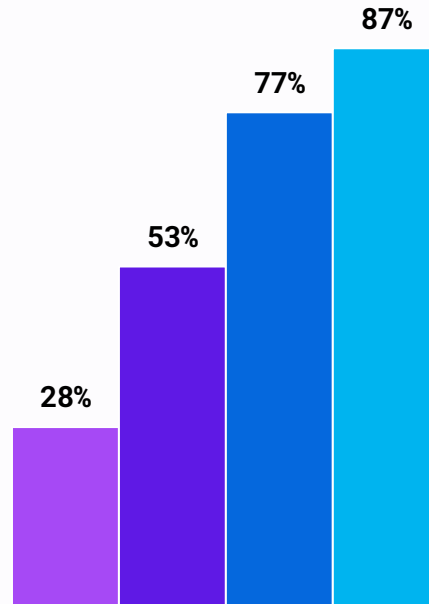
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

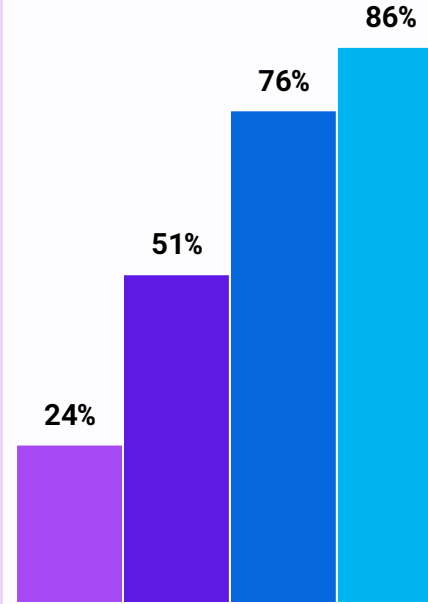
- + Consumers are .31x more likely to trust an internet service provider after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 62 points less likely to recommend an internet service provider to friends or family after a 1-2- star experience versus after a 5- star experience.
- + Consumers are 2.3x more likely to purchase more from an internet service provider after a high satisfying experience versus after an unsatisfying experience.

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

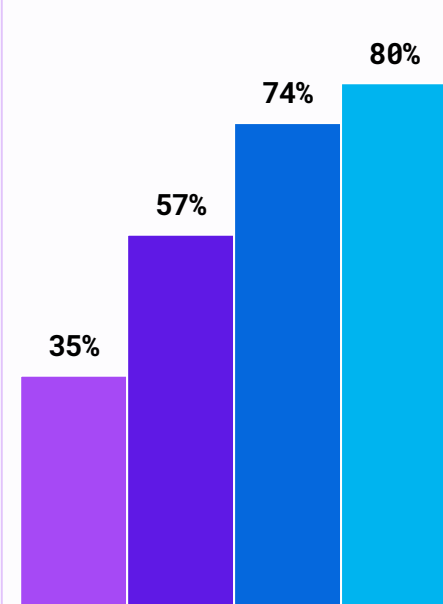
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

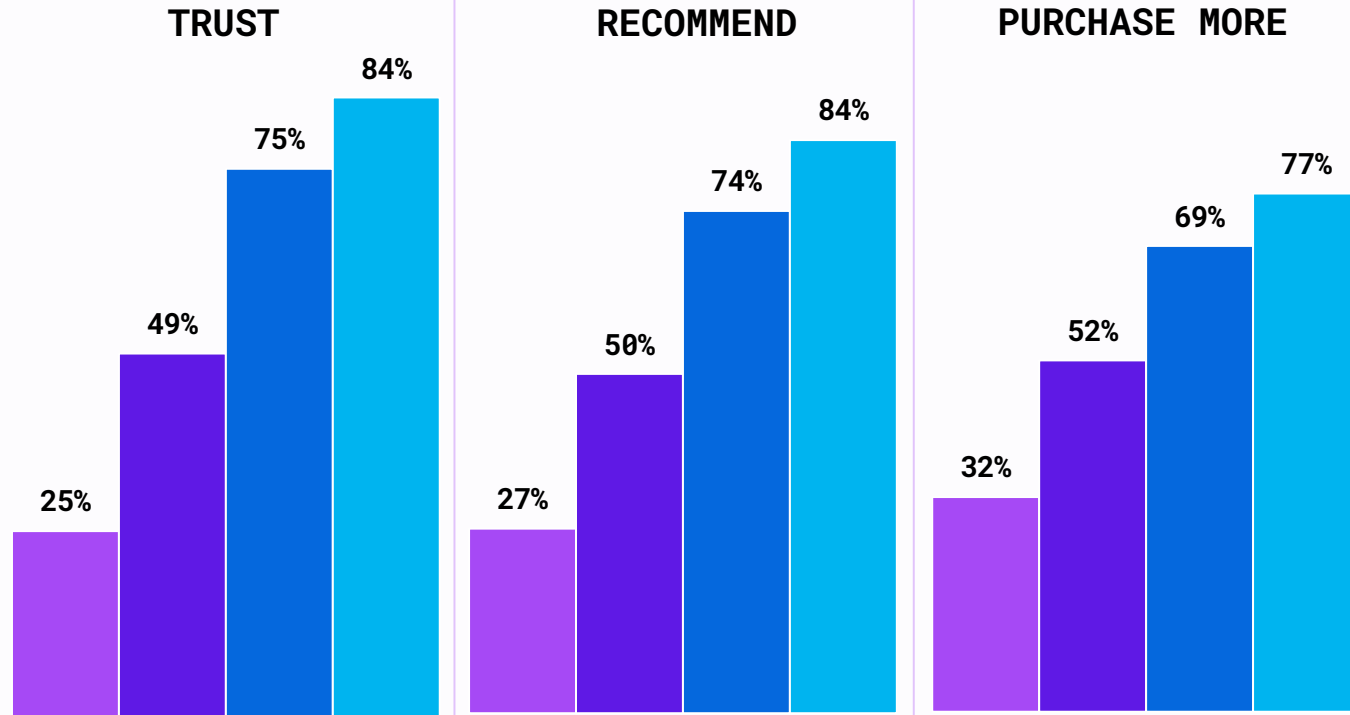
# CX and Loyalty Connections – Mobile Phone Provider

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

## KEY TAKEAWAYS

- + Consumers are 3.3x more likely to trust a mobile phone provider after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 57 points less likely to recommend a mobile phone provider to friends or family after a 1-2- star experience versus after a 5- star experience.
- + Consumers are 2.4x more likely to purchase more from a mobile phone provider after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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



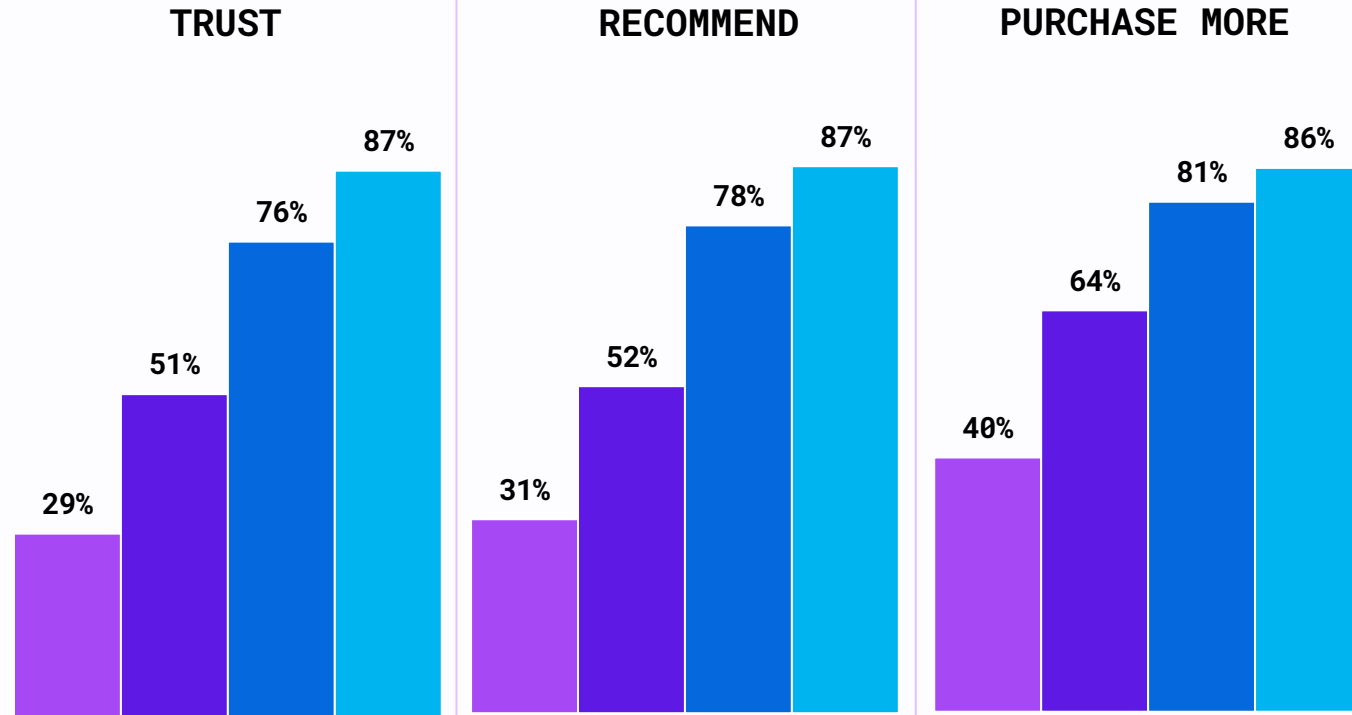
# CX and Loyalty Connections – Online Retail

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

## KEY TAKEAWAYS

- + Consumers are 3.0x more likely to trust an online retailer after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 56 points less likely to recommend an online retailer to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.1x more likely to purchase more from an online retailer after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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

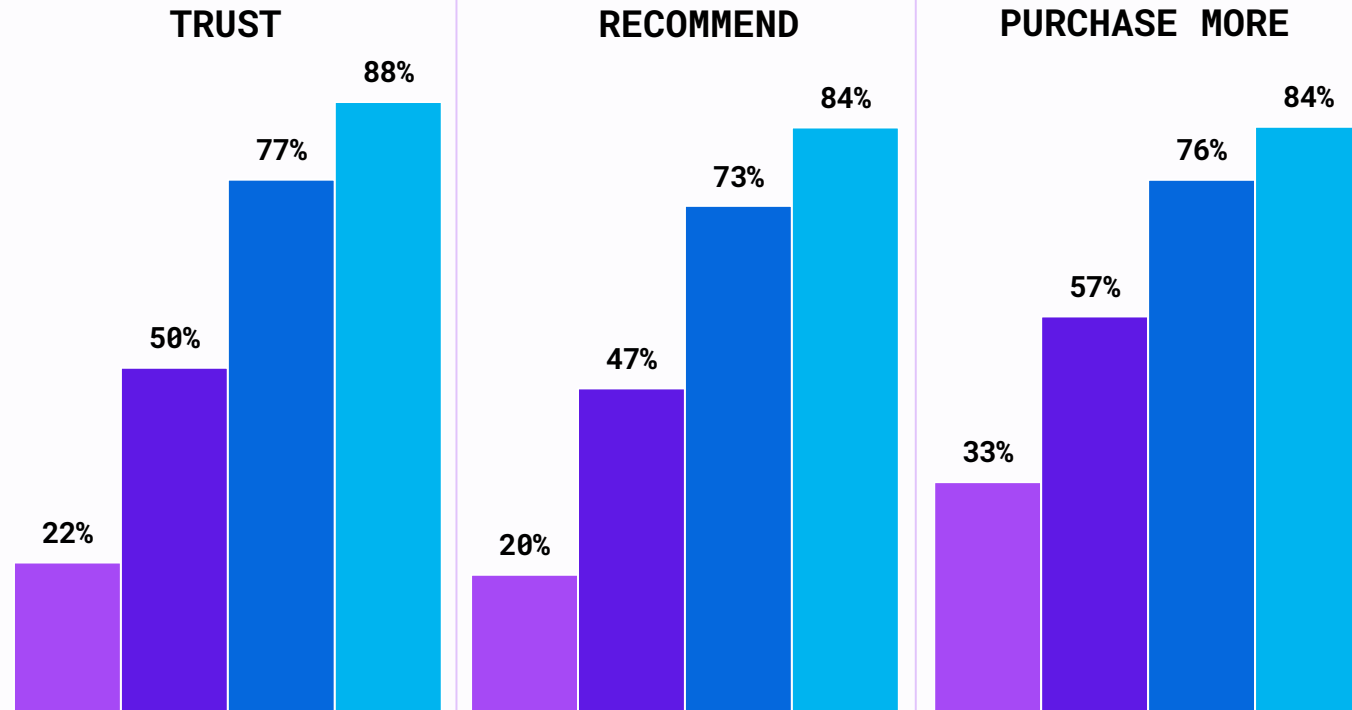
# CX and Loyalty Connections – Parcel Delivery

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

## KEY TAKEAWAYS

- + Consumers are 4.0x more likely to trust a parcel delivery service after a 5-star experience compared to after a 1-2- star experience.
- + Consumers are 64 points less likely to recommend a parcel delivery service to friends or family after a 1-2- star experience versus after a 5- star experience.
- + Consumers are 2.5x more likely to purchase more from a parcel delivery service after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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

# CX and Loyalty Connections – Property Insurance

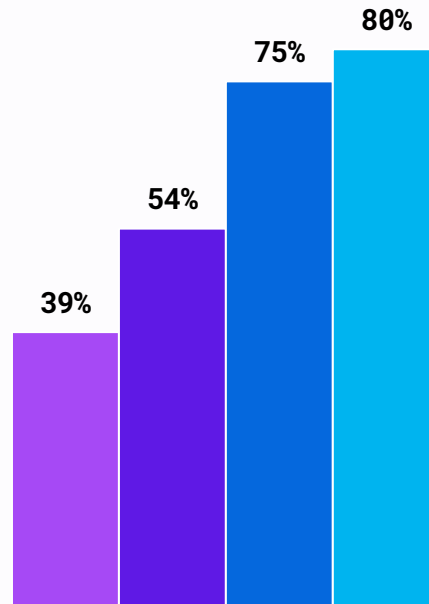
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

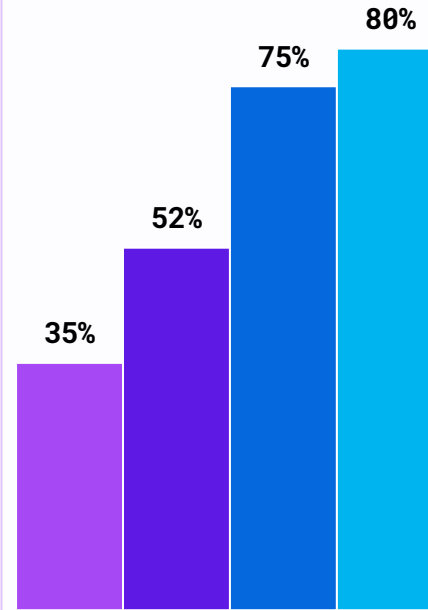
- + Consumers are 2.0x more likely to trust a property insurer after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 45 points less likely to recommend a property insurer to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 2.2x more likely to purchase more from a property insurer after a high satisfying experience versus after an unsatisfying experience.

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

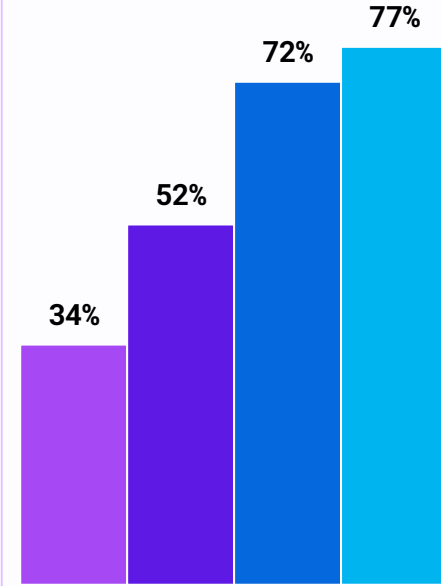
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

# CX and Loyalty Connections – Public Utility

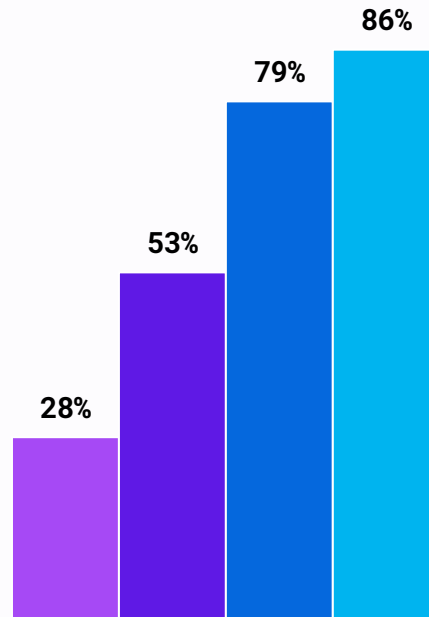
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

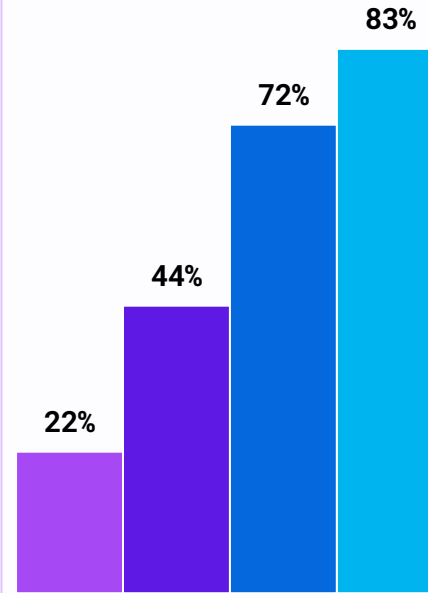
- + Consumers are 3.1x more likely to trust a public utility after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 61 points less likely to recommend a public utility to friends or family after a 1-2- star experience versus after a 5-star experience.
- + Consumers are 1.8x more likely to purchase more from a public utility after a high satisfying experience versus after an unsatisfying experience.

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

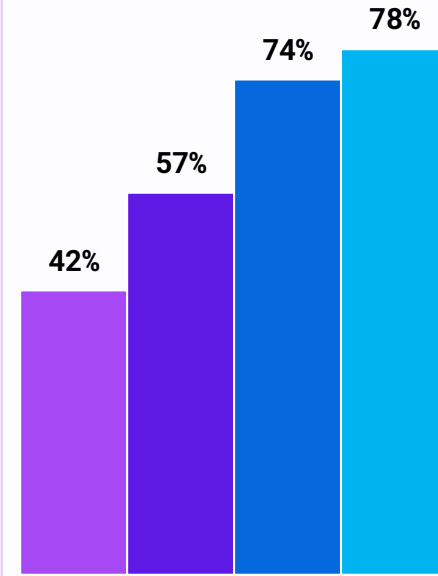
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

# CX and Loyalty Connections – Streaming

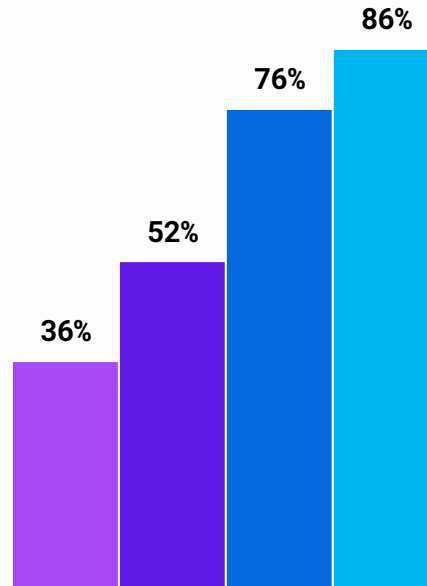
Consumers who say they are 'somewhat' or 'very' likely to:  
(out of 1- to 5-star satisfaction ratings)

## KEY TAKEAWAYS

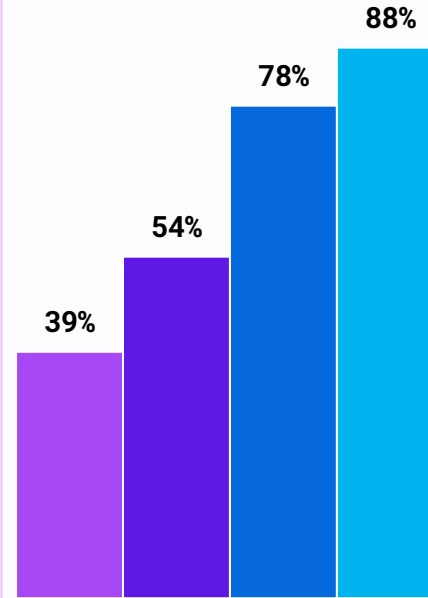
- + Consumers are 2.4x more likely to trust a streaming service after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 49 points less likely to recommend a streaming service to friends or family after a 1-2-star experience versus after a 5-star experience.
- + Consumers are 1.9x more likely to purchase more from a streaming service after a high satisfying experience versus after an unsatisfying experience.

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

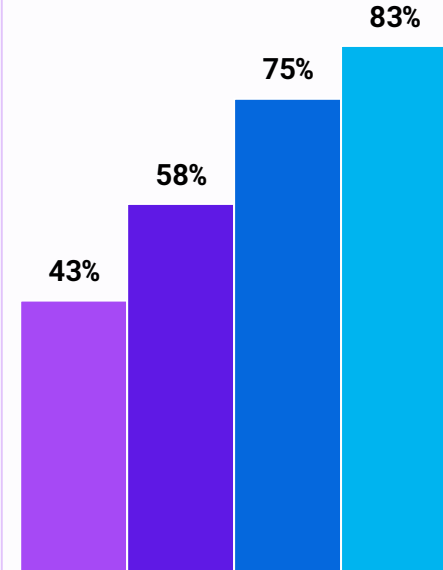
### TRUST



### RECOMMEND



### PURCHASE MORE



## ABOUT

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

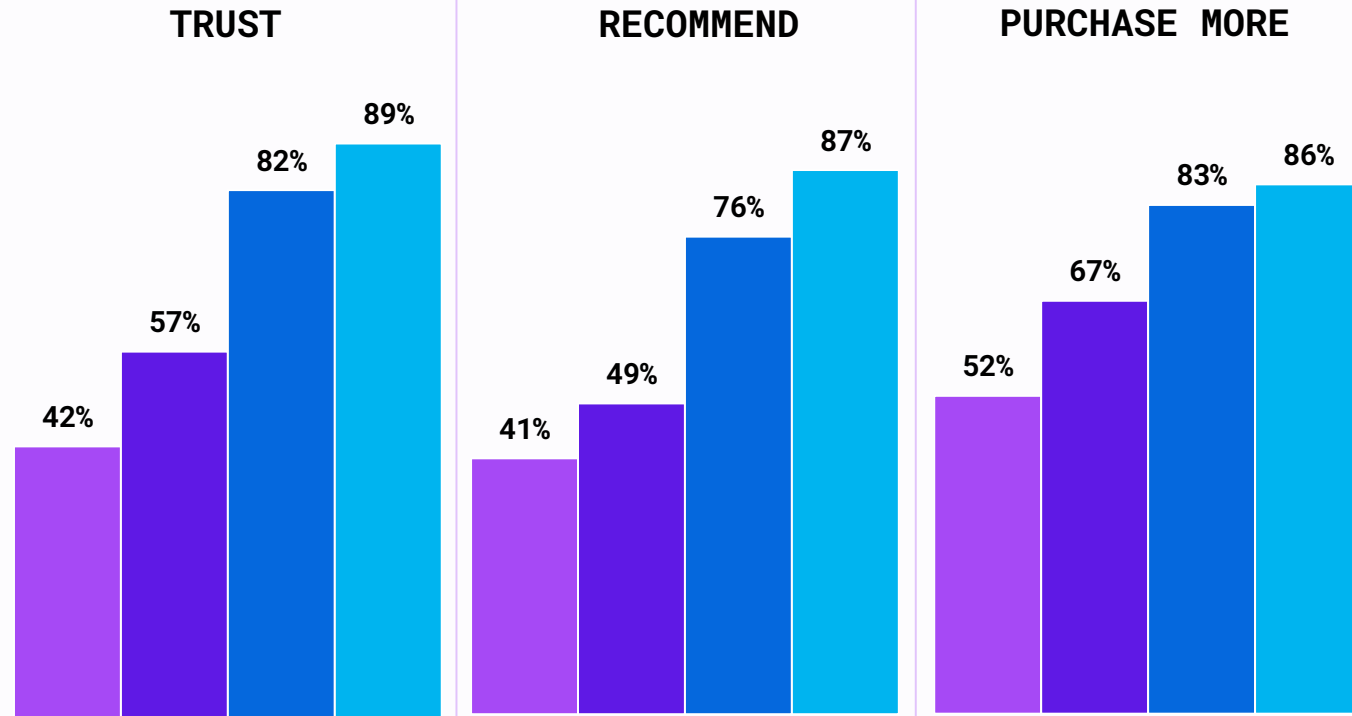
# CX and Loyalty Connections – Supermarket

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

## KEY TAKEAWAYS

- + Consumers are 2.1x more likely to trust a supermarket after a 5-star experience compared to after a 1-2-star experience.
- + Consumers are 46 points less likely to recommend a supermarket to friends or family after a 1-2-star experience versus after a 5-star experience.
- + Consumers are 1.7x more likely to purchase more from a supermarket after a high satisfying experience versus after an unsatisfying experience.

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



## ABOUT

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

# CX and Trust Connections by Country

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

□ 2 lowest gaps      □ 2 highest gaps

## KEY TAKEAWAYS

- + Italian consumers are 4.1x more likely to trust after a satisfying versus and unsatisfying experience, the largest gap across all 25 countries, followed by US consumers at 4.0x.
- + Filipino and Emirati consumers are most likely to trust after a 5-star experience, while Italians are least likely to do so.
- + Chinese organizations receive the least benefit to consumer trust after delivering a satisfying versus unsatisfying experience, with consumers just 1.5x more likely to trust.

	1-2 stars	3 stars	4 stars	5 stars	5 vs 1-2 stars
Argentina	23%	49%	75%	83%	3.6
Australia	22%	49%	76%	86%	3.9
Brazil	32%	57%	77%	86%	2.7
Canada	26%	47%	75%	87%	3.3
Colombia	31%	57%	81%	88%	2.8
China	58%	63%	80%	89%	1.5
Finland	30%	61%	83%	88%	3.0
France	22%	50%	75%	87%	3.9
Germany	27%	47%	70%	83%	3.0
India	50%	67%	86%	90%	1.8
Indonesia	43%	60%	83%	87%	2.1
Italy	20%	44%	70%	82%	4.1
Japan	35%	58%	82%	89%	2.6
Mexico	43%	64%	81%	85%	2.0
Netherlands	36%	56%	76%	87%	2.4
New Zealand	34%	61%	84%	88%	2.6
Philippines	42%	65%	87%	92%	2.2
Singapore	46%	66%	86%	91%	2.0
South Korea	28%	50%	78%	87%	3.1
Spain	32%	47%	72%	85%	2.7
Sweden	25%	50%	72%	83%	3.4
Thailand	26%	60%	83%	88%	3.4
U.S.	22%	48%	75%	88%	4.0
U.K.	23%	50%	75%	87%	3.9
U.A.E.	55%	74%	89%	92%	1.7

## ABOUT

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

# CX and Advocacy Connections by Country

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

□ 2 lowest gaps      □ 2 highest gaps

## KEY TAKEAWAYS

- + UK consumers are 5.8x more likely to recommend after a satisfying versus an unsatisfying experience, the largest gap across all 25 countries, followed by Australian consumers at 4.5x.
- + Emirati organizations receive the least benefit to consumer advocacy after delivering a satisfying versus unsatisfying experience, with consumers just 1.6x more likely to trust.

	1-2 stars	3 stars	4 stars	5 stars	5 vs 1-2 stars
Argentina	25%	52%	76%	85%	3.4
Australia	19%	44%	74%	85%	4.5
Brazil	35%	56%	79%	88%	2.5
Canada	21%	43%	71%	83%	3.9
Colombia	31%	58%	83%	89%	2.9
China	51%	60%	77%	86%	1.7
Finland	22%	49%	75%	84%	3.9
France	22%	45%	71%	85%	3.8
Germany	28%	47%	69%	78%	2.7
India	46%	68%	86%	91%	2.0
Indonesia	43%	64%	83%	88%	2.0
Italy	24%	46%	72%	83%	3.5
Japan	15%	24%	52%	56%	3.6
Mexico	38%	65%	82%	88%	2.3
Netherlands	38%	52%	72%	83%	2.2
New Zealand	38%	61%	82%	87%	2.3
Philippines	36%	65%	88%	93%	2.6
Singapore	41%	64%	84%	88%	2.2
South Korea	26%	46%	70%	81%	3.2
Spain	30%	47%	68%	85%	2.8
Sweden	19%	43%	71%	82%	4.3
Thailand	27%	59%	83%	89%	3.2
U.S.	23%	46%	74%	87%	3.9
U.K.	14%	43%	72%	83%	5.8
U.A.E.	56%	77%	88%	93%	1.6

## ABOUT

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



# CX and Rebuying Connections by Country

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

□ 2 lowest gaps      □ 2 highest gaps

## KEY TAKEAWAYS

- + Thai consumers are 3.0x more likely to purchase more after a satisfying experience versus an unsatisfying experience, the largest gap across all 25 countries, followed by UK and Swedish consumers at 2.8x.
- + Japanese consumers are the least likely to purchase more after a 5-star experience.
- + Emirati organizations receive the least benefit to consumer rebuying after delivering a satisfying versus unsatisfying experience, with consumers just 1.5x more likely to trust.

	1-2 stars	3 stars	4 stars	5 stars	5 vs 1-2 stars
Argentina	40%	58%	73%	81%	2.0
Australia	37%	55%	72%	79%	2.1
Brazil	43%	62%	80%	85%	2.0
Canada	35%	53%	72%	76%	2.1
Colombia	41%	64%	79%	84%	2.0
China	56%	67%	80%	87%	1.6
Finland	38%	62%	79%	85%	2.3
France	34%	60%	79%	88%	2.6
Germany	32%	45%	58%	62%	1.9
India	45%	65%	84%	89%	2.0
Indonesia	46%	60%	77%	80%	1.8
Italy	28%	43%	64%	75%	2.7
Japan	25%	31%	43%	51%	2.0
Mexico	44%	64%	78%	80%	1.8
Netherlands	39%	50%	59%	68%	1.7
New Zealand	44%	68%	81%	85%	1.9
Philippines	39%	64%	84%	90%	2.3
Singapore	49%	63%	82%	87%	1.8
South Korea	43%	62%	84%	91%	2.1
Spain	36%	53%	68%	79%	2.2
Sweden	26%	51%	69%	72%	2.8
Thailand	27%	56%	77%	82%	3.0
U.S.	34%	58%	76%	82%	2.4
U.K.	27%	58%	73%	78%	2.8
U.A.E.	60%	78%	89%	90%	1.5

## ABOUT

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

## DATA CALCULATION

*Only industries with 100+ respondents who said they had an experience in a country 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. 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 for each respective loyalty behavior.

In **Figures 5-7**, we calculated the percentages for each of the three loyalty behaviors by first totaling the number of global responses in which consumers said they were either 'somewhat' or 'very' likely to trust, recommend, or purchase more from an organization in each industry. 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 for each respective loyalty behavior.

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 in which consumers were either 'somewhat' or 'very' likely to trust, recommend, or purchase more from an organization in any industry. We then divided those totals by the number of respondents who rated their satisfaction with recent experiences in that same country as 1 or 2 stars, 3 stars, 4 stars, or 5 stars for each respective loyalty behavior.

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