



DATA SNAPSHOT

Global Consumer Satisfaction and Loyalty, 2025

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of Qualtrics XM Institute's 2024 Global Consumer Study, nearly 24,000 consumers around the world evaluated their recent experiences with organizations in 20 industries across four elements: *satisfaction*, *likelihood to trust*, *likelihood to recommend*, and *likelihood to purchase more*. From their responses – along with the data we collected in our 2021, 2022, and 2023 Global Consumer Studies, we analyzed global consumer sentiment as we roll into 2025 as well as the change in satisfaction and loyalty across countries and industries over the past three years. From this analysis, we found that:

- + **Loyalty metrics lag behind satisfaction.** Consumers provided a satisfaction rating of 4- or 5- stars after 76% of recent experiences. However, their likelihood to perform key loyalty behaviors is somewhat lower; after recent interactions, 73% trust the organization, 70% would recommend the organization to friends and family, and 69% say they are likely to purchase more from the organization.
- + **Consumer loyalty is down as we head into 2025.** Consumers are less likely to trust (-1.2 pts), recommend (-1.5 pts), and purchase more (-1.3 pts) from organizations. *Likelihood to trust* and *recommend* has decreased the most among consumers in New Zealand and the UAE, while *likelihood to repurchase* has decreased the most among German and New Zealand consumers.
- + **Overall satisfaction remains relatively stable.** Consumer satisfaction has not changed significantly from 2024, increasing by just 0.4 points. Chinese consumers most frequently rate their recent experiences as a 4- or 5-star experience (85%), while Japanese consumers are the least likely to do so (56%). Satisfaction changed the least among UK and Spanish consumers, while satisfaction among Dutch and New Zealand consumers had the greatest volatility.
- + **Hotels enjoy the most consumer trust and advocacy.** Despite moderate decreases in both consumer trust (-2.4 pts) and advocacy (-2.5 pts), hotels still enjoy the highest rates of trust (79%) and advocacy (78%) of all 20 industries, while supermarkets enjoy the highest likelihood of repurchasing (82%). Government agencies rated lowest for trust, advocacy, and repurchasing.

STUDY KEY FACTS

- Global consumer study
- Online panel study
- Conducted in Q3 of 2024
- 23 countries
- 23,730 consumers

Global Consumer Satisfaction and Loyalty, 2025

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2024. Using an online survey, XM Institute collected data from 23,730 consumers across 23 countries/regions: Australia, Brazil, Canada, China, Denmark, France, Germany, Hong Kong (China), India, Ireland, Italy, Japan, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Korea, Spain, Sweden, 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' approximate sample sizes are as follows:

Hong Kong (China): 400. New Zealand: 600. the Philippines: 660. Ireland: 700. Denmark, Singapore, and the UAE: 800.

FIGURES IN THE REPORT

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- Consumer Satisfaction YoY Change by Country
- Satisfaction by Industry
- Consumer Satisfaction YoY Change by Industry
- Consumer Trust Across Countries
- Consumer Trust YoY Change by Country
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- Consumer Advocacy Across Countries
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- Consumer Rebuying Across Countries
- Consumer Rebuying YoY Change by Country
- Consumer Rebuying by Industry
- Consumer Rebuying YoY Change by Industry

Methodology

Satisfaction: Executive Summary

KEY FINDINGS: SATISFACTION

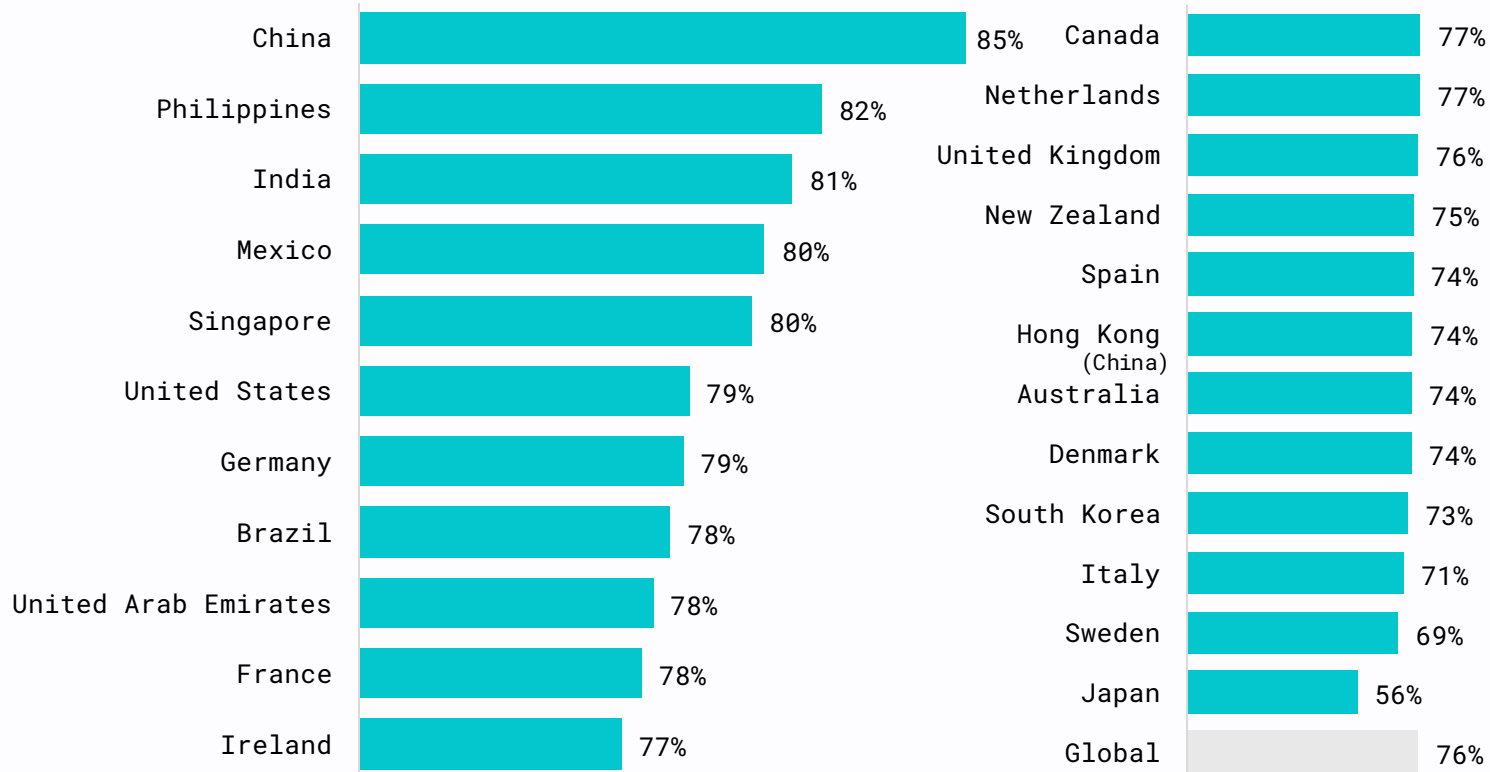
Satisfaction is a popular, easy-to-understand customer experience measurement. It acts as a quality indicator of customer experience that is used as a core metric in half of customer experience programs in 2024. To gauge the current state of customer satisfaction, we asked consumers around the world how satisfied they were with their recent experiences across 20 industries on a scale of 1- to 5-stars. From their responses, we found that:

- + **Global consumer satisfaction lands at 76%.** Consumers provided a 4- or 5- star rating out of 5 stars for 76% of interactions in 2025. Global consumer satisfaction remains steady, with just a +0.3 percentage-point change from 2022 across the 19 countries and 17 industries we've consistently included in our studies.
- + **Chinese consumers are the most satisfied on average.** Chinese consumers provided an average satisfaction rating of 85%, nine points higher than the global average. Filipino (82%) and Indian (81%) consumers have the next highest satisfaction levels. Meanwhile, Japanese consumers are least likely to rate their satisfaction with a recent experience at 4- or 5- stars, doing so only 56% of the time. Swedish and Italian organizations also receive lower average satisfaction ratings from their consumers (69% and 71%, respectively).
- + **Satisfaction levels have shifted the most amongst New Zealand consumers.** Over the past year,, consumer satisfaction in New Zealand has decreased 4.7 percentage points, the largest change across the 20 countries represented. Dutch consumers reported the second-largest change in satisfaction, a 4.4 percentage-point increase from 2024. Satisfaction levels in the UK (-0.2 pts) and Spain (+0.3 pts) have changed the least.
- + **Streaming media companies enjoy the highest consumer satisfaction.** Forty-eight percent of streaming consumers gave a 5-star satisfaction rating, while another 36% provided a 4-star rating.

Consumer Satisfaction Across Countries

Average SATISFACTION across 20 Industries

(4- or 5- stars out of 1-5-star satisfaction ratings)



ABOUT

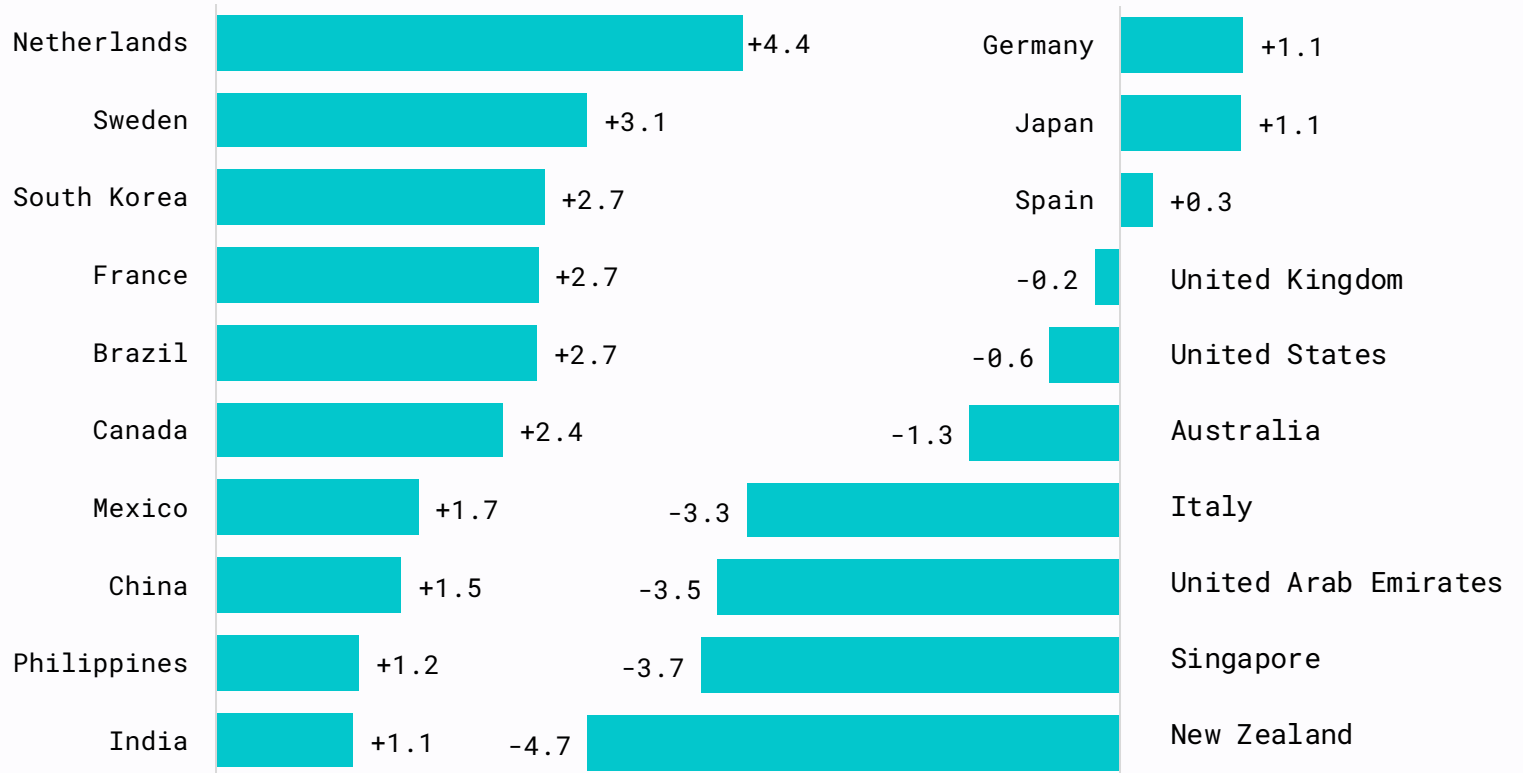
Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Satisfaction YoY Change by Country

Year-over-Year Change in Consumer Satisfaction

(Percentage point change from 2024 to 2025 satisfaction levels)



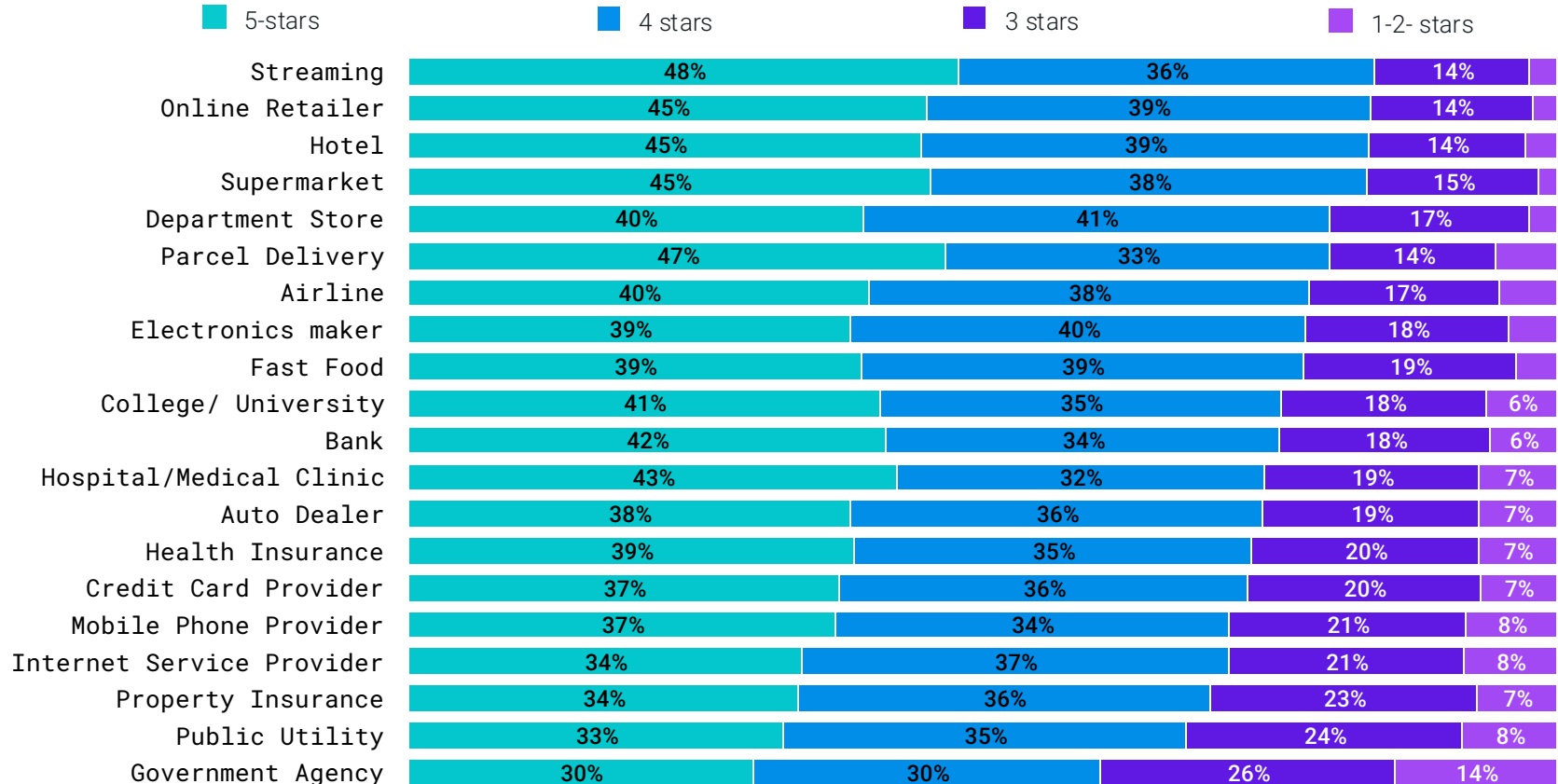
ABOUT

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Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Satisfaction by Industry

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



ABOUT

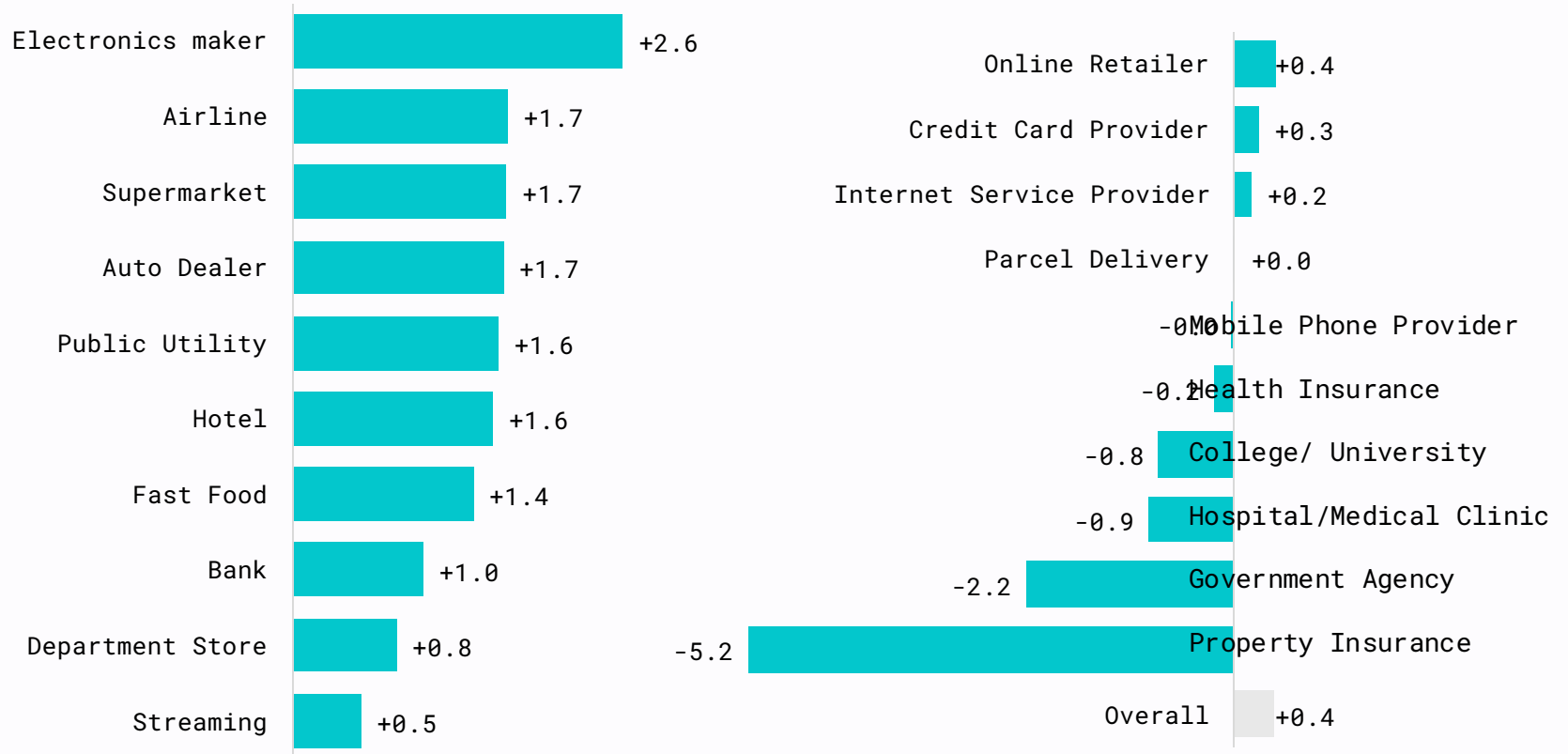
Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Satisfaction YoY Change by Industry

Year-over-Year Change in Consumer Satisfaction

(Percentage point change from 2024 to 2025 satisfaction levels)



ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Trust: Executive Summary

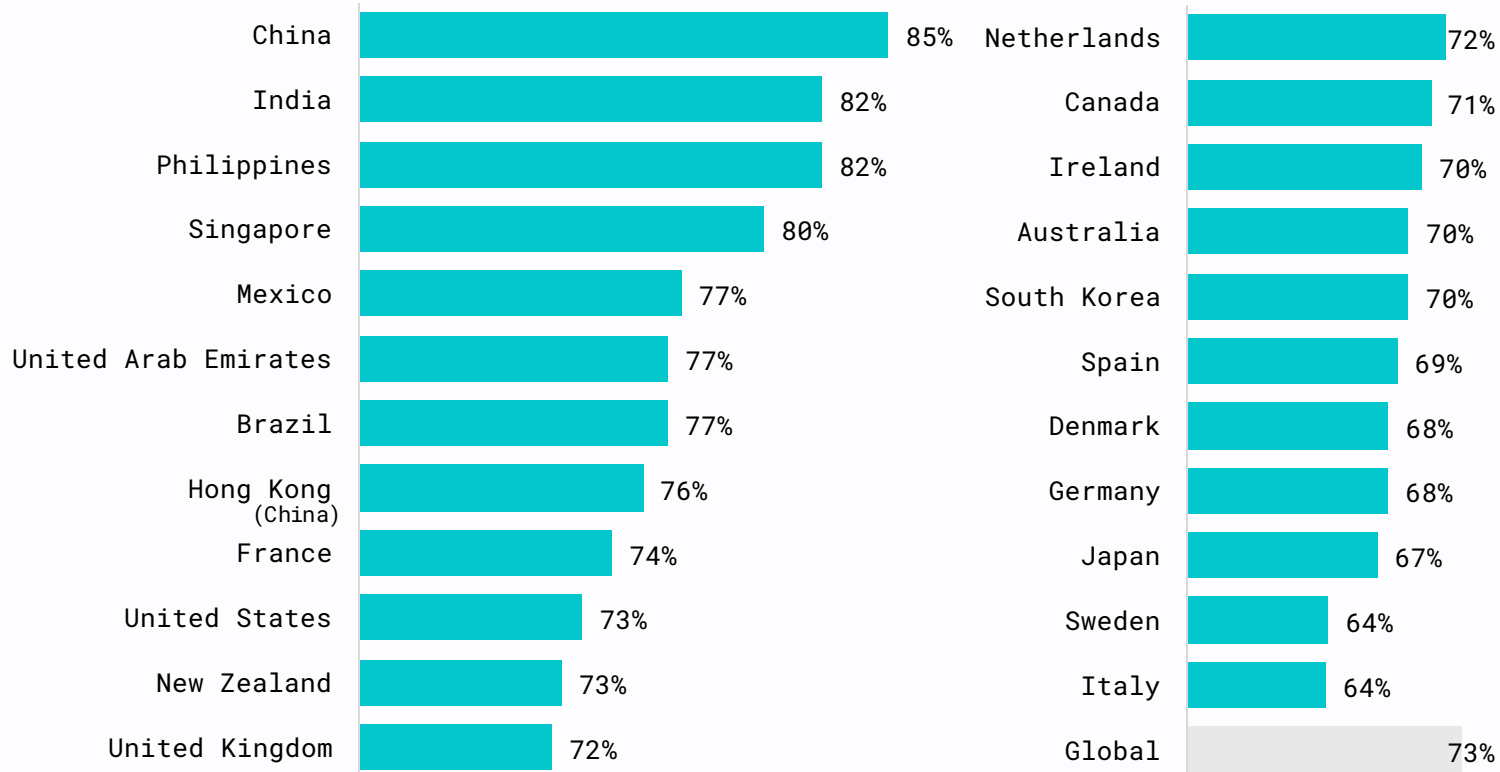
KEY FINDINGS: LIKELIHOOD TO TRUST

Trust is a classic measurement indicative of your customer relationship. Cultivating customer trust is essential to achieving your goals, whether that be to change customer behaviors, whether that's through influencing their spending behaviors, getting them to advocate for your organization, earning their forgiveness if you make a mistake, and much more. To understand the state of trust as we move into 2025, we asked consumers around the world how likely they are to trust an organization from one of 20 different industries after their recent on a scale of 1 (*extremely unlikely*) to 5 (*extremely likely*). From their responses, we found that:

- + **Global consumer trust lands at 73%.** Consumers said they are likely to trust an organization after 73% of experiences. Global consumer trust has grown over the past three years, increasing 1.9 points from 2022 across the 19 countries and 17 industries we've consistently included in the studies.
- + **Chinese consumers demonstrate the highest levels of trust.** With an average rating of 85%, Chinese consumers' trust levels are 12 points higher than the global average. Indian and Filipino consumers follow closely behind, each with an average rating of 82%. Italian and Swedish consumers, meanwhile, are most hesitant to trust, with average ratings of just 64%.
- + **Trust has shifted most dramatically among Emirati consumers.** Between our 2024 and 2025, studies consumer likelihood to trust in the United Arab Emirates has decrease 10.5 percentage-points, the largest year-over-year change across the 20 countries surveyed. New Zealand consumers reported the second-largest change in trust, a 7.2 percentage-point decrease from 2024. Consumer trust in the Netherlands (-0.1 pt) and Canada (+0.5 pts) has changed the least.
- + **Hotels and supermarkets enjoy the highest consumer trust.** Consumers were most likely to say that they are *somewhat* or *extremely likely* to trust after recent hotel and supermarket experiences (79% each) and least likely to do so after experiences with government agencies (62%). Property insurers experienced the greatest decline in consumer trust, with a 4.2 percentage-point decrease over the last year. Hotels (-2.6 pts) and credit card providers (-2.4 pts) saw the next-largest changes in consumer trust.

Consumer Trust Across Countries

Average LIKELIHOOD TO TRUST across 20 Industries (somewhat or extremely likely to trust)

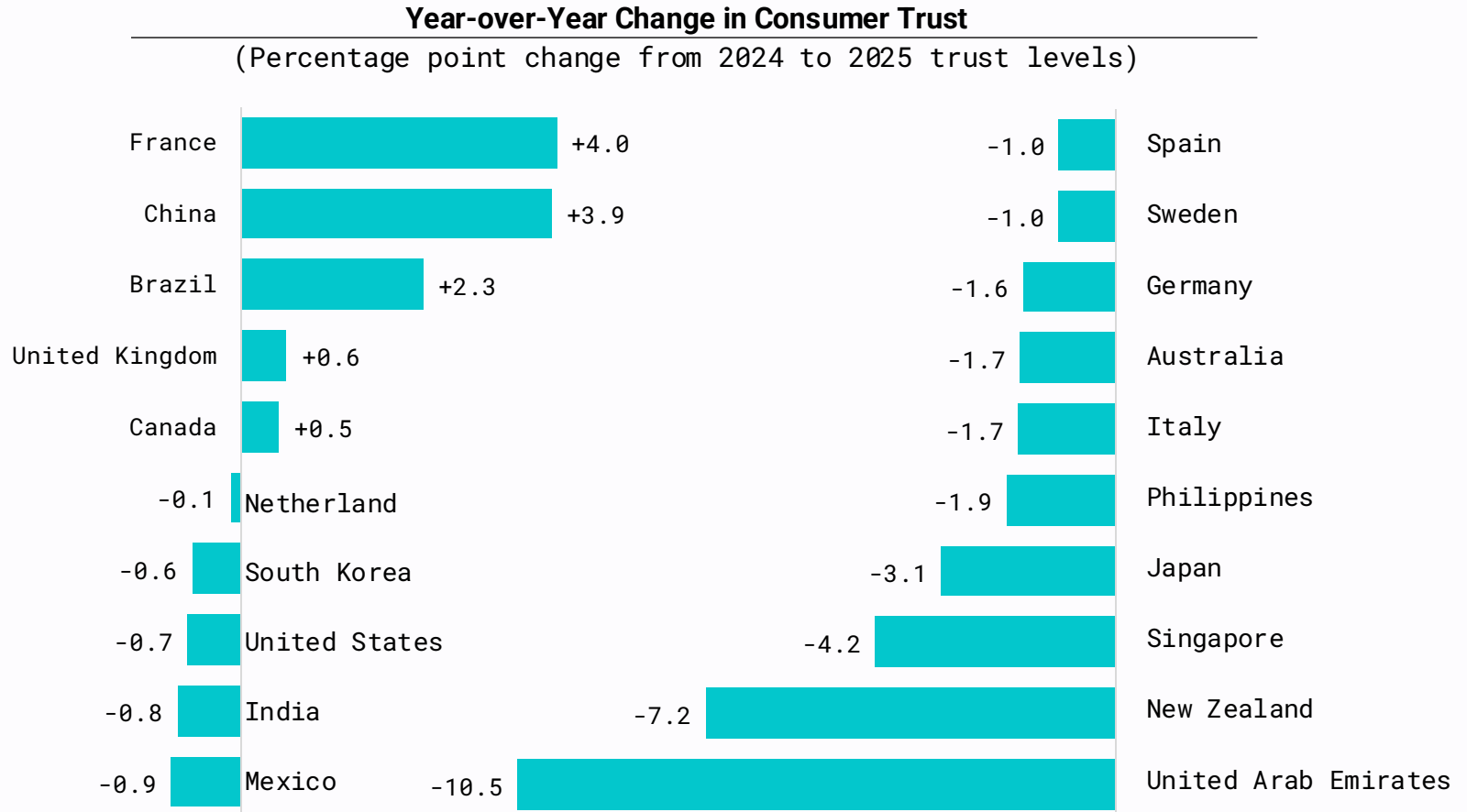


ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Trust YoY Change by Country



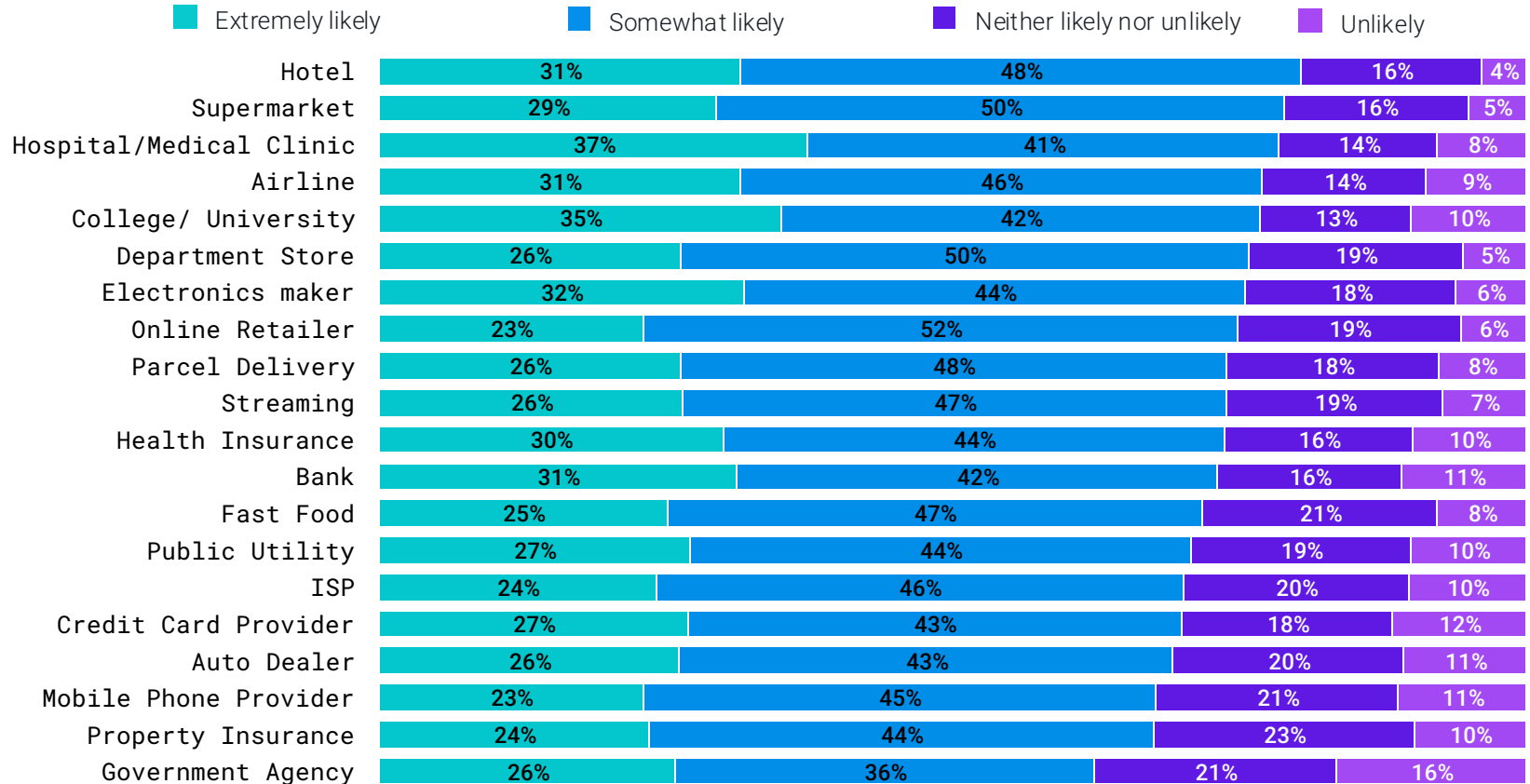
ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Trust by Industry

How likely are you to TRUST these organizations?



ABOUT

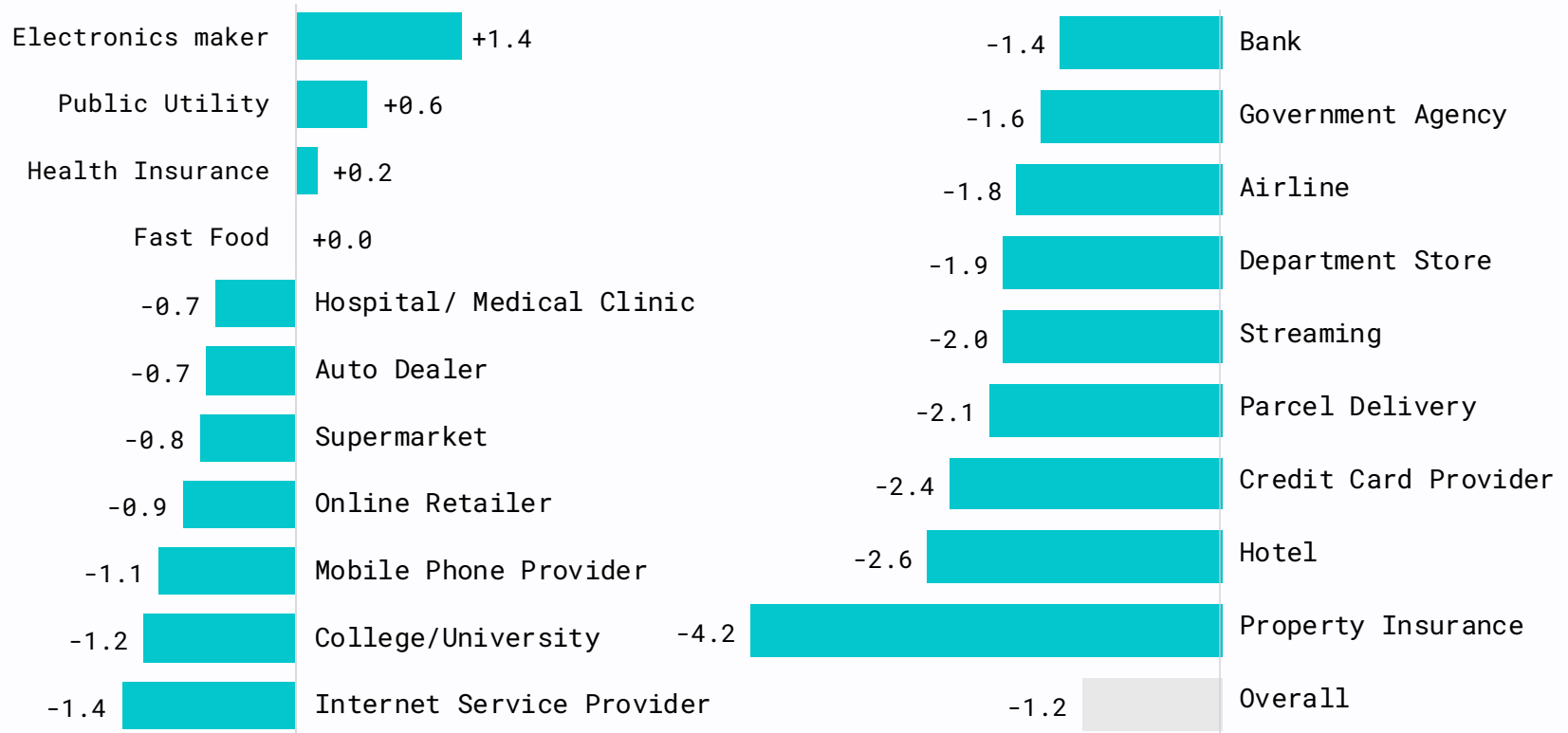
Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Trust YoY Change by Industry

Year-over-Year Change in Consumer Trust

(Percentage point change from 2024 to 2025 trust levels)



ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Advocacy: Executive Summary

KEY FINDINGS: LIKELIHOOD TO RECOMMEND

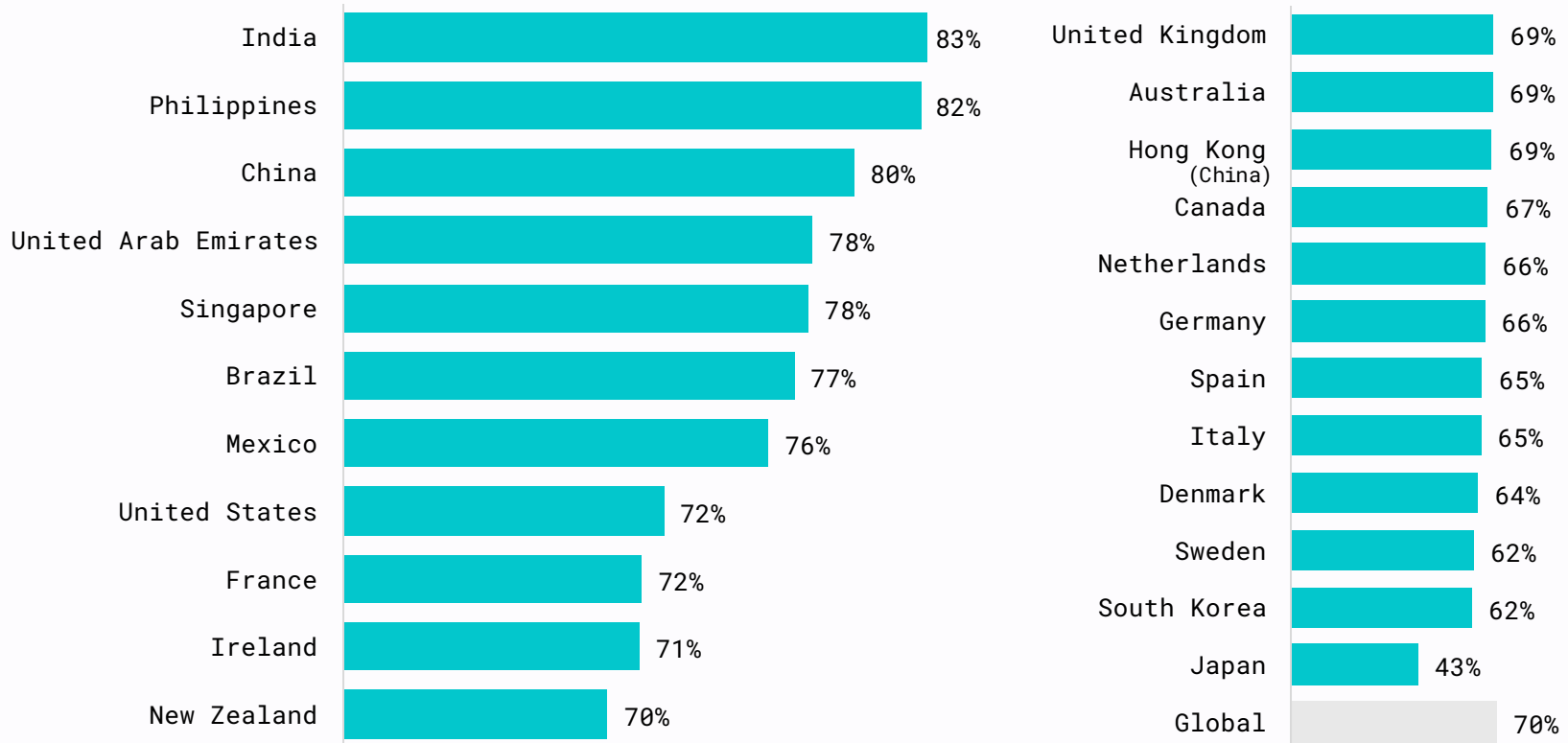
Likelihood to recommend is a frequently used customer experience relationship metric, often measured using Net Promoter Score (NPS). Having customers advocate for your organization to friends and family is a primary way to expand both your customer base and share of wallet. To understand the state of consumer advocacy as we move into 2025, we asked consumers globally how likely they are to recommend the organization from one of 20 different industries after their recent experience on a scale of 1 (*extremely unlikely*) to 5 (*extremely likely*). From their responses, we found that:

- + **Global consumer advocacy lands at 70%.** After 70% of interactions, consumers report being *somewhat* or *very* likely to recommend an organization to friends and family. This metric has increased approximately 1.1 points since 2022 for the 20 countries and 17 industries we've consistently included in the studies.
- + **Indian consumers are the strongest advocates.** Indian consumers say they are likely to recommend after 83% of experiences, the highest rating across the 23 countries. Filipino (82%) and Chinese (80%) consumers are similarly strong. Japanese organizations should expect the least advocacy from their consumers, who are likely to recommend after just 43% of interactions – 27 points below the global average.
- + **Advocacy has changed the most amongst Emirati consumers.** Between our 2024 and 2025 studies, likelihood to recommend in the United Arab Emirates has decreased 9.1 points, the largest year-over-year change across the 20 countries represented. A similarly large drop (-8.7 pts) occurred among New Zealand consumers. On the other end of the spectrum, French organizations saw the largest increase in consumer advocacy (+4.4 pts) from 2024. Consumer advocacy has changed the least in Australia, with minimal year-over-year increases in likelihood to recommend.
- + **Hotels and electronics receive the highest advocacy ratings.** Consumers are likely to recommend the organization after 78% of hotel experiences and 77% of electronics experiences—the highest advocacy levels across 20 industries. Government agencies (56%) and public utilities (62%) are least likely to have customers recommend them to friends or family. Over the last year, advocacy has changed the least for online retailers (+0 pts), while property insurers (-5.5 pts) and credit card providers (-3.2 pts) saw the most dramatic declines.

Consumer Advocacy Across Countries

Average LIKELIHOOD TO RECOMMEND across 20 Industries

(somewhat or extremely likely to recommend)

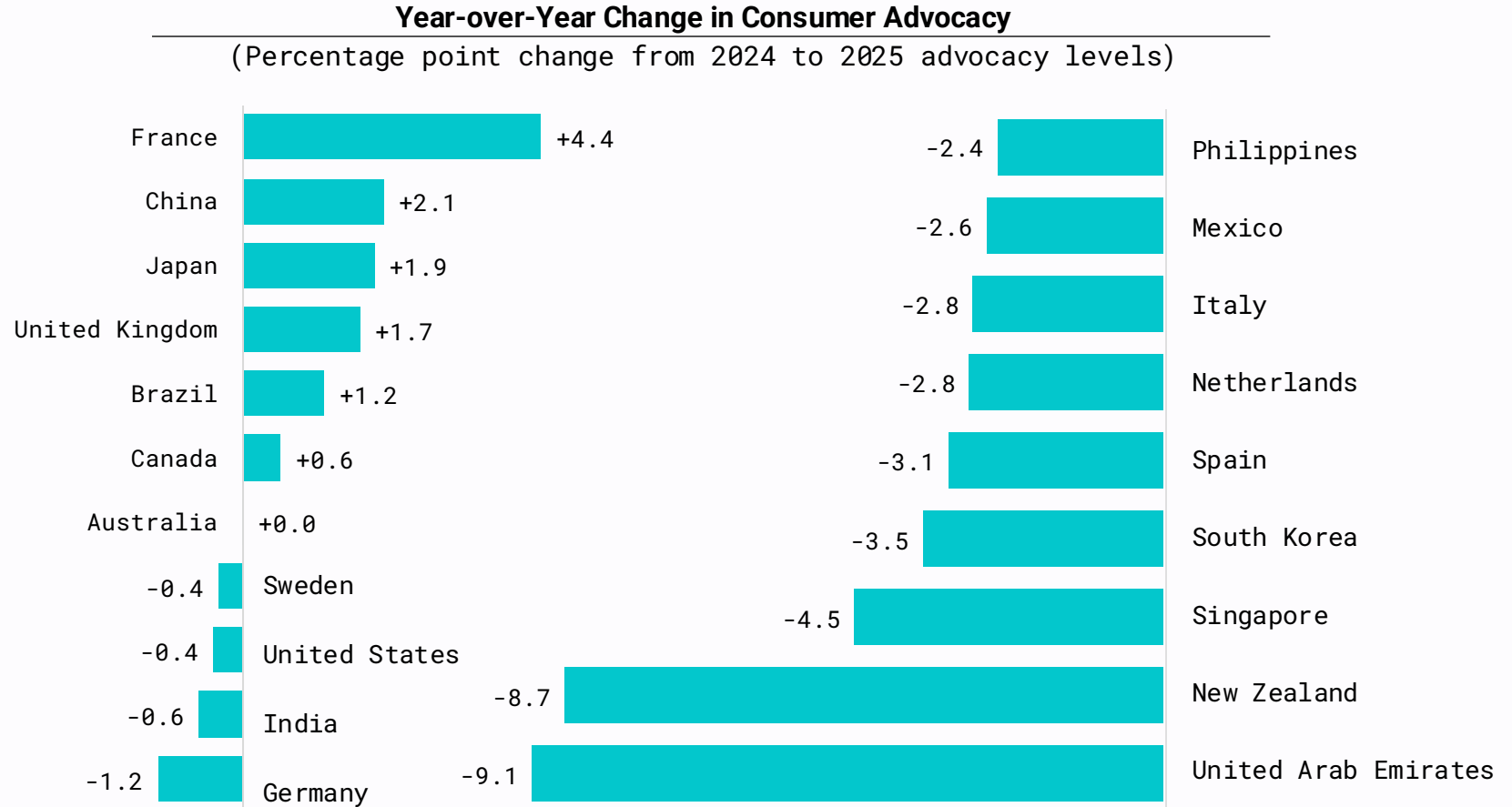


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Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Advocacy YoY Change by Country



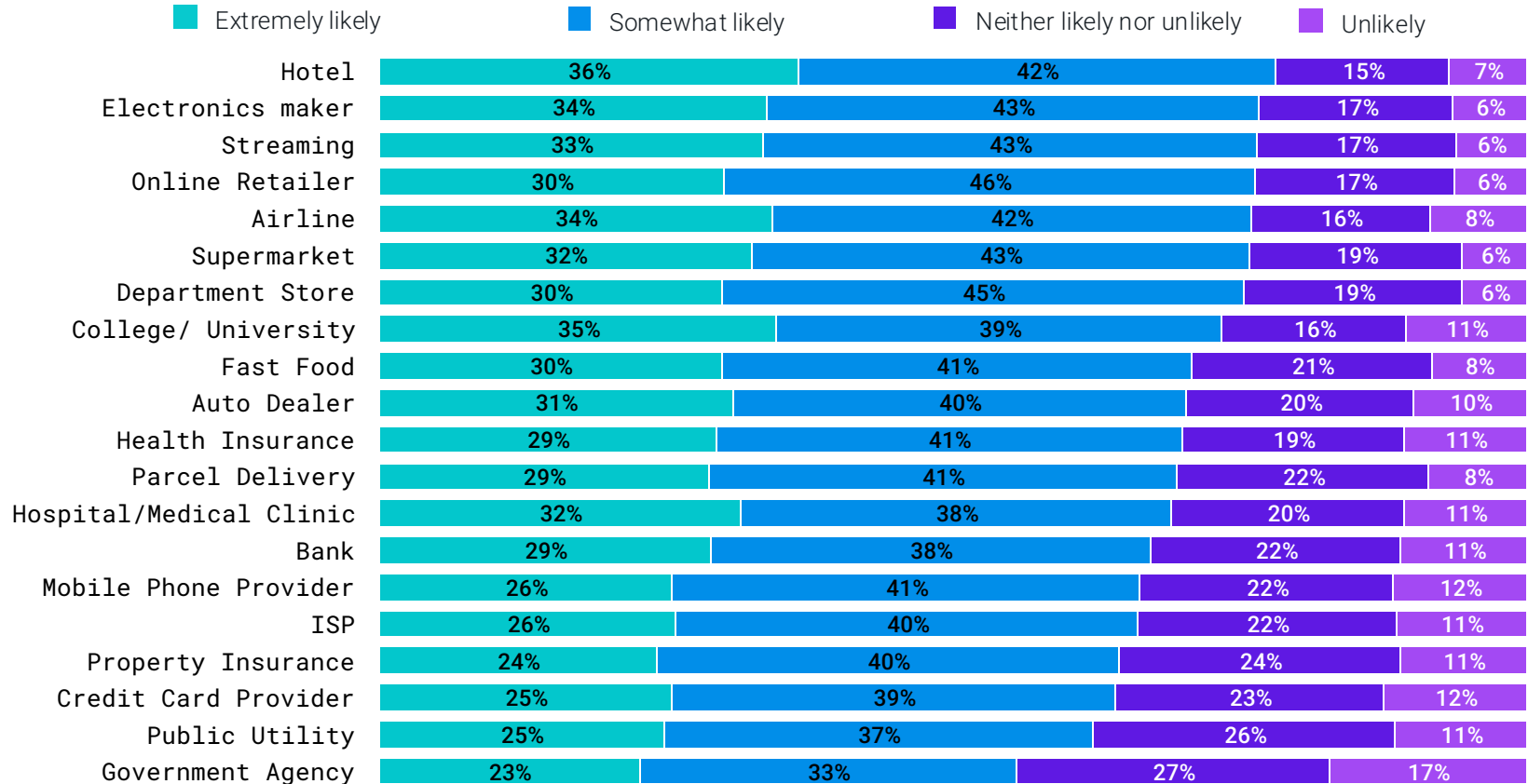
ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Advocacy by Industry

How likely are you to RECOMMEND these organizations to friends or family?



ABOUT

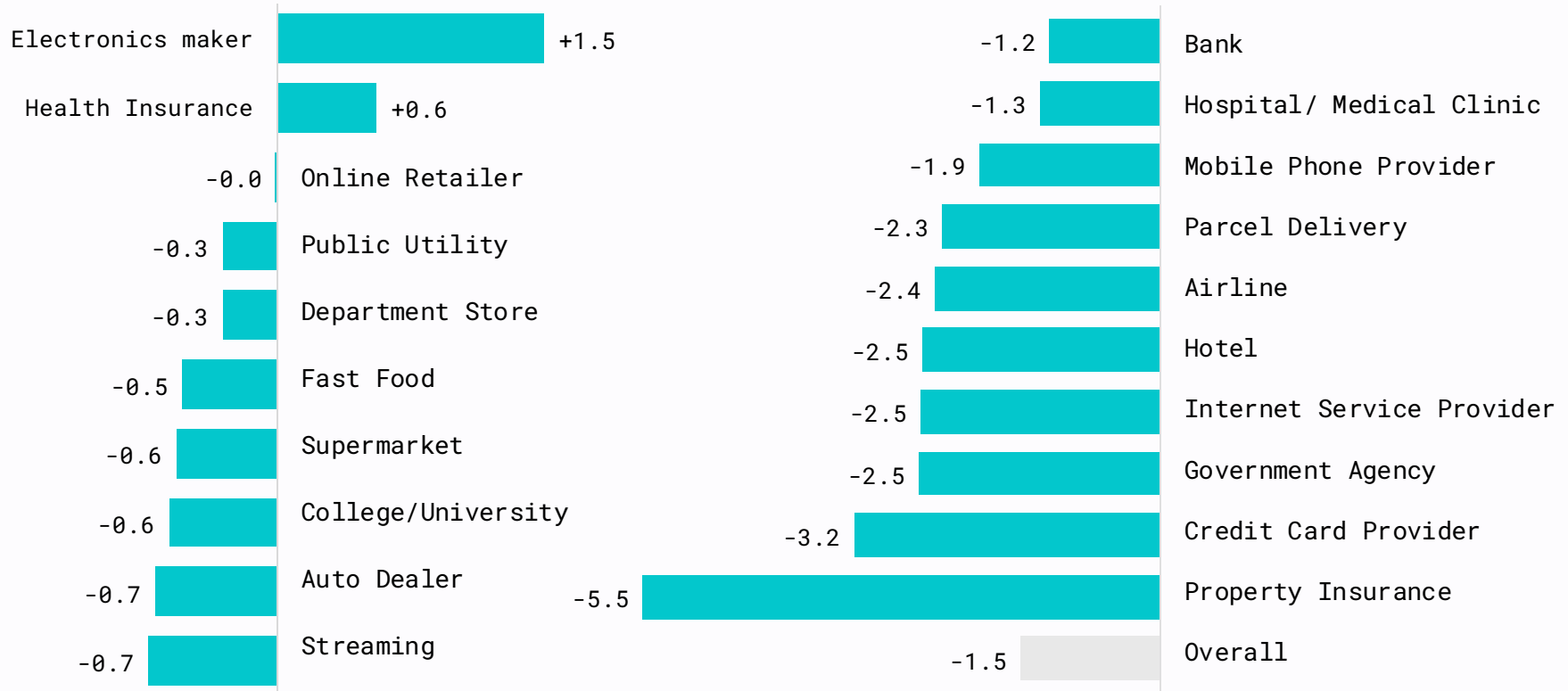
Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Advocacy YoY Change by Industry

Year-over-Year Change in Consumer Advocacy

(Percentage point change from 2024 to 2025 advocacy levels)



ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Rebuying: Executive Summary

KEY FINDINGS: LIKELIHOOD TO REBUY

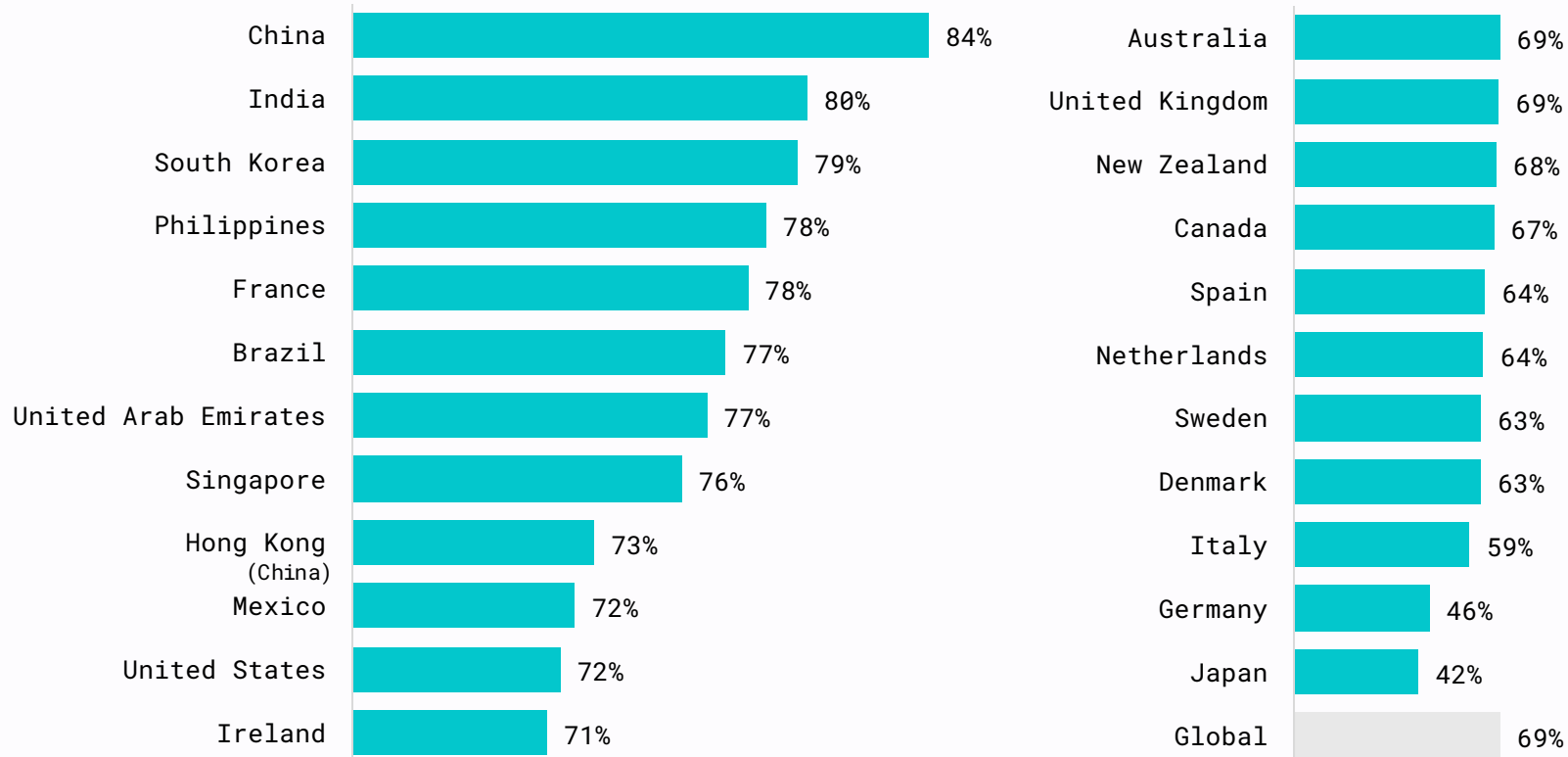
Repeat purchases are critical drivers of business results. To measure how likely global customers are to rebuy from organizations they recently interacted with, we asked consumers to rate their likelihood of repurchasing across 20 industries on a scale of 1 (*extremely unlikely*) to 5 (*extremely likely*) to understand the state of consumer repurchasing in 2025. From their responses, we found that:

- + **Global consumer likelihood to repurchase lands at 69%.** After 69% of recent experiences, consumers said they were *somewhat* or *extremely likely* to buy more from that organization. Globally, likelihood to purchase more has increased by 3.2 points from 2022 to 2025 for the 19 countries and 17 industries we've consistently included in these studies.
- + **Chinese consumers are the most likely to purchase more.** Chinese consumers say they are likely to purchase more after 84% of experiences – twice the rate of Japanese consumers, who say they are likely to rebuy just 42% of the time. German (46%) and Italian (59%) consumers have the second- and third-lowest intent to repurchase levels across 23 countries.
- + **Repurchase intent has changed the most amongst German consumers.** Between our 2024 and 2025 studies, consumer likelihood to purchase more has changed the most for Germans (-11.2 pts) and New Zealanders (-11.1 pts), while it has changed the least for Australian consumers (+0.2 pts). Dutch organizations enjoy the greatest increase in consumer intent to rebuy (+5.1 pts).
- + **Consumers are most likely to purchase more from supermarkets and online retailers.** Consumers globally are likely to purchase more after 82% of both supermarket and online retail experiences, while just 56% say the same after government agency experiences. Over the past year, likelihood to repurchase has increased the most for online retailers (+2 pts), and second-most for public utilities (+1.4 pts). Meanwhile, repurchasing intent has decline the most for property insurers, dropping -6.3 points in the past year. Health insurers (+0.1 pt) and fast food (+0.2 pts) saw the least change in their consumers' likelihood to purchase more.

Consumer Rebuying Across Countries

Average LIKELIHOOD TO PURCHASE MORE across 20 Industries

(somewhat or extremely likely to purchase more)



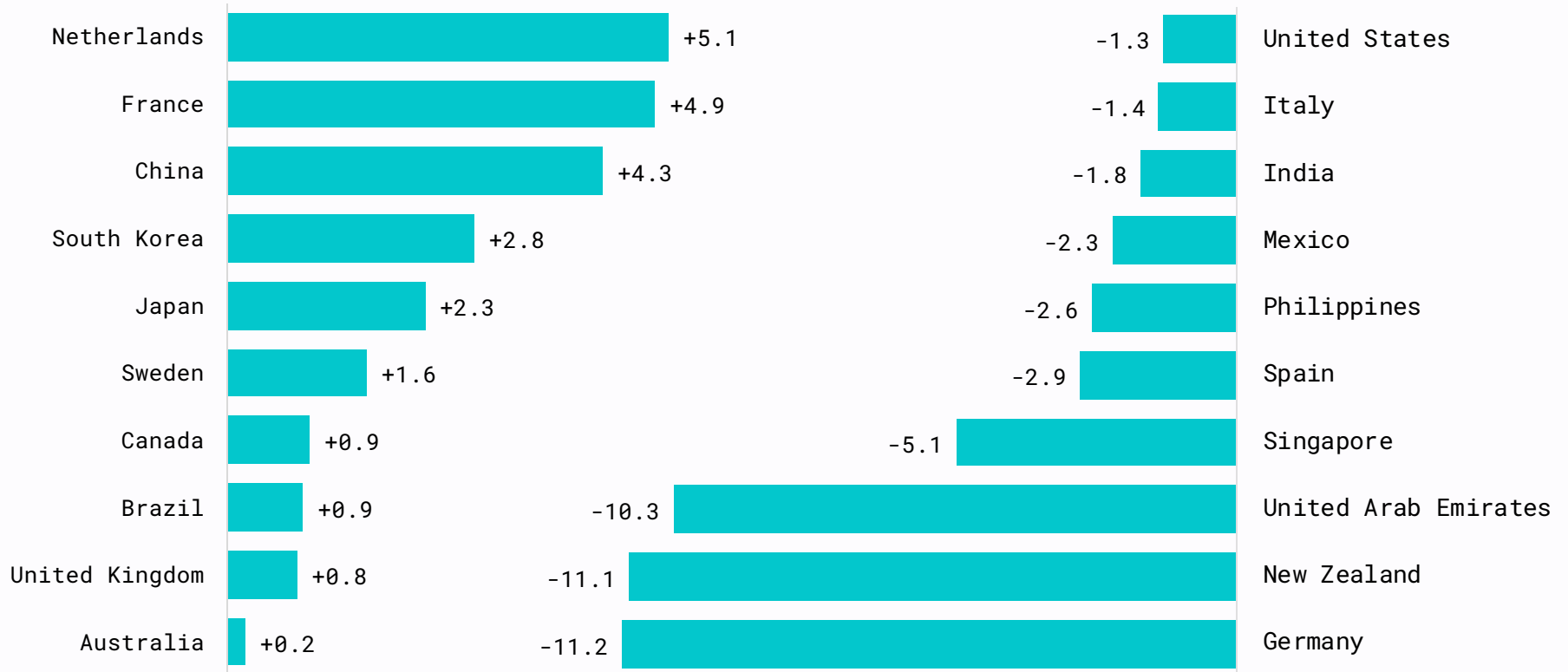
ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Rebuying YoY Change by Country

Year-over-Year Change in Consumer Rebuying
(Percentage point change from 2024 to 2025 rebuying levels)



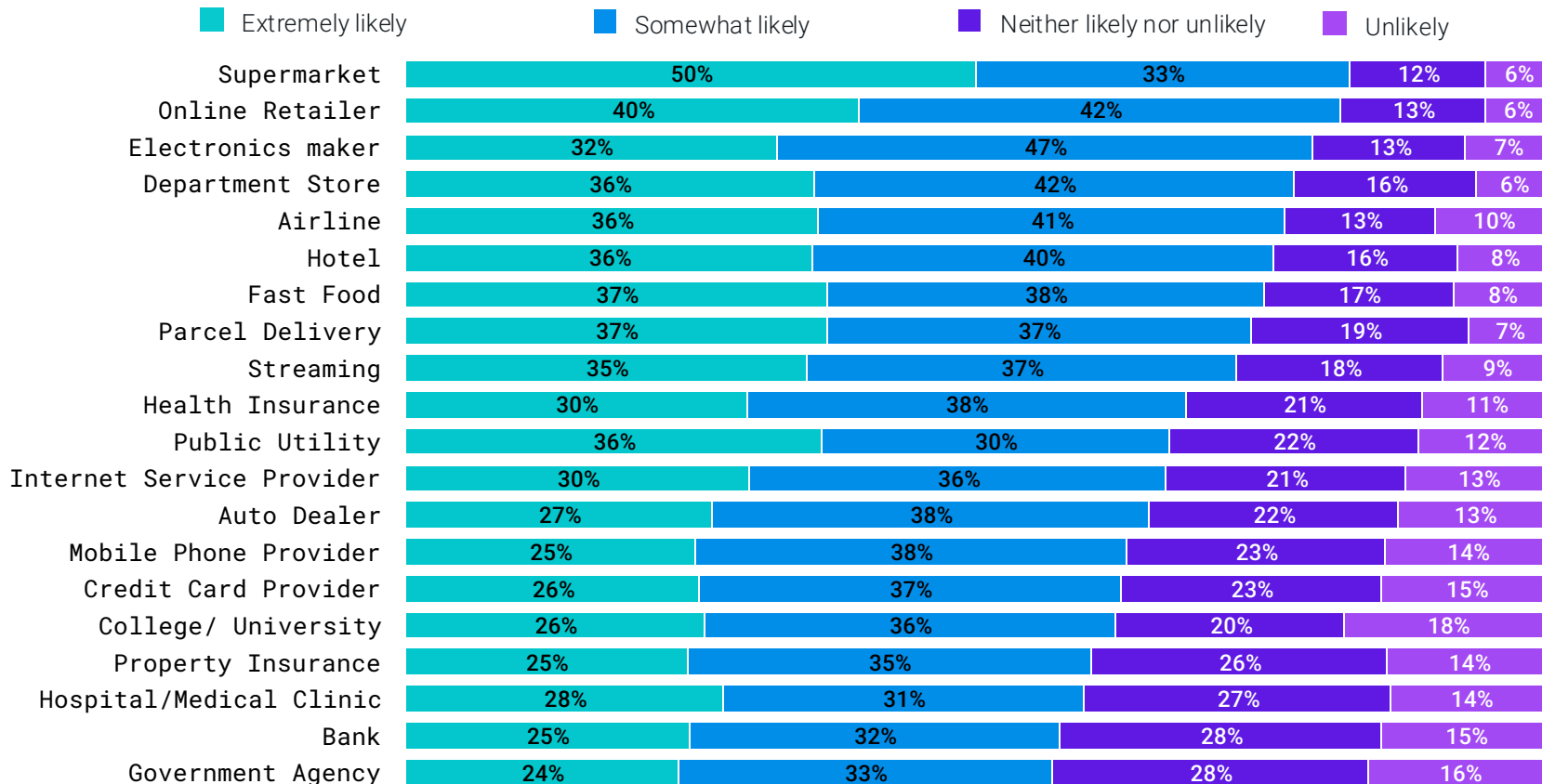
ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Rebuying by Industry

How likely are you to PURCHASE MORE from these organizations?



ABOUT

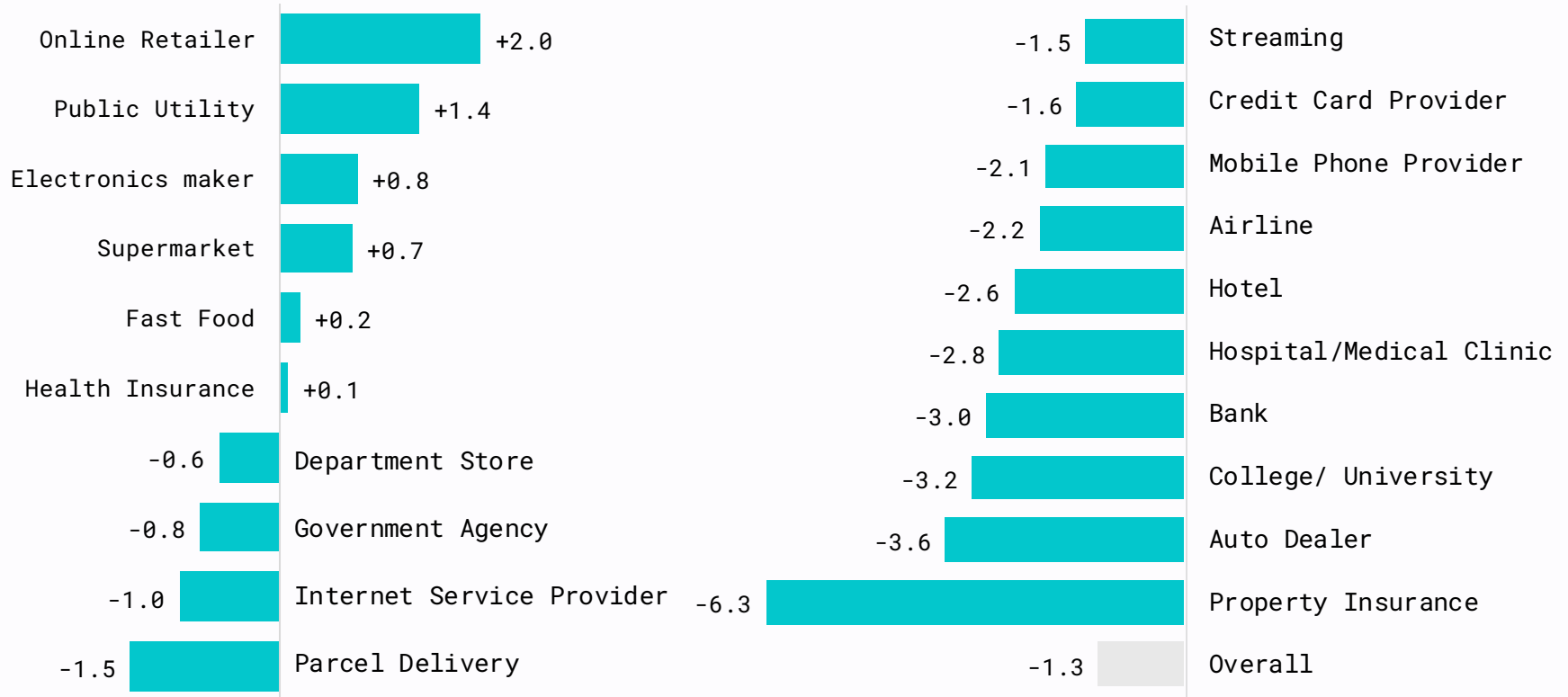
Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Consumer Rebuying YoY Change by Industry

Year-over-Year Change in Consumer Rebuying

(Percentage point change from 2024 to 2025 likelihood to purchase more levels)



ABOUT

Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

DATA CALCULATION

Data was only reported on and analyzed from industries with a sample size of 100+ in each country – otherwise reported as N/A. Consumers responded only about experiences with industries they had an interaction with in the previous 90 days.

Year-over-year calculations were performed using data only from the 20 countries from which we collected data in both 2023 and 2024. Calculations of CX metric changes from 2022-2025 were conducted only using data from the 19 countries from which we collected data in 2022, 2023, 2024, and 2025. Year-over-year calculations were not conducted including Hong Kong (China) due to small sample sizes. Data was not collected on auto dealer, electronics, and hotel industries in 2022.

CX metrics for all years are reported as the percentage selecting the top 2 boxes on a 5-point Likert scale out of the total number of responses for each country/industry.

All Global numbers are an average across all countries.

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