

Benchmarking **CX metrics** by industry and brands in the **U.S., Q4 2025**

Comparing **key customer experience performance indicators**

Overview

The following report evaluates the state of customer experiences in the United States during the fourth and final quarter of 2025 and compares it to past quarters of the year. The survey was conducted online with a sample of 1,001 participants, all of whom are involved in household purchasing decisions.

By analyzing seven key industries in the U.S., the report provides a clear picture of customer loyalty, satisfaction & purchase intent and highlight which brands are excelling in customer experience. To ensure reliable and accurate insights, only brands that met the minimum required number of responses were included in the analysis.

By year-end, a synchronized correction swept across all sectors, marking a universal reset that erased the record-high gains seen during the third quarter of 2025. This dramatic collapse was fueled by a combination of economic fatigue and the operational strain of the holiday season, which pushed customer tolerance to its lowest collective point of the year.

Hotel and Hospitality led the rankings with the highest Net Promoter Score (38) and Customer Satisfaction rating (80%). Conversely, the Automotive sector experienced the most severe volatility, ending with the lowest performance in both NPS (12) and CSAT (65%).

A universal "summer peak, winter crash" pattern emerged, as interest rate hikes and holiday operational pressures drove customer tolerance to yearly lows.

The report reveals a strong correlation between operational consistency and resilience; essential service providers like Banking and Grocery declined less severely than discretionary categories.

In Q4, consumers prioritized value maximization and reliability, rewarding brands like Costco while punishing those that faltered under economic fatigue.

About the Key Performance Indicators

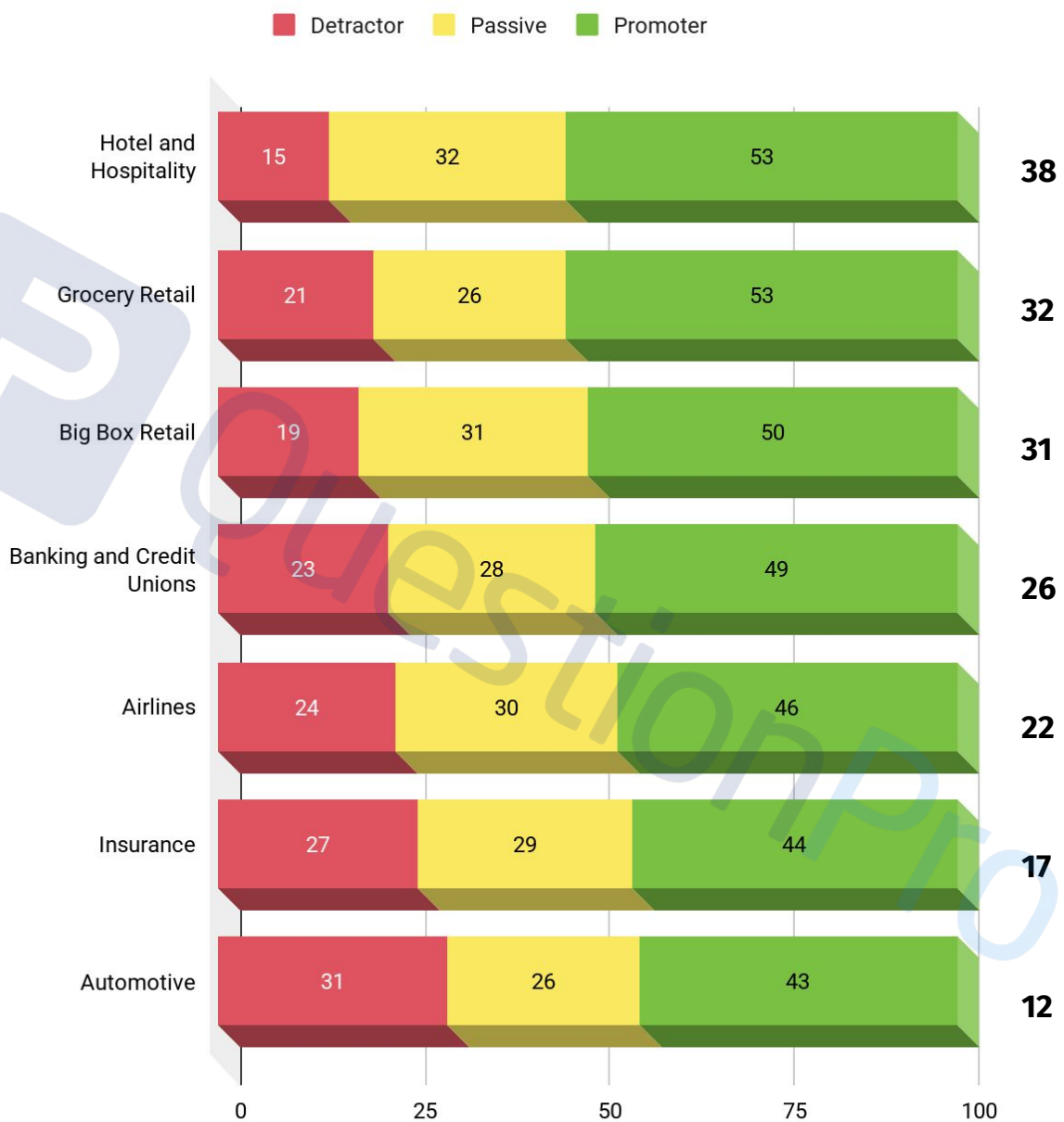
A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively an organization is achieving its key business objectives. In benchmarking, KPIs are used to compare an organization's performance against industry standards or best practices to identify areas for improvement.

- Net Promoter Score (NPS): Measures customer loyalty by gauging their likelihood to recommend a brand.
- Customer Satisfaction (CSAT): Evaluates overall customer satisfaction with products and services.
- Repurchase intent: Assesses whether customers are likely to continue buying from a brand.

Q4 2025

Net promoter score (NPS) by industry

Hotel and Hospitality (38), Grocery Retail (32), and Big Box Retail (31) top the NPS rankings, signaling strong customer loyalty, while Insurance (17) and Automotive (12) lag behind for the final quarter of the year.



Q4. Net promoter score (NPS) by industry

NPS Quarterly Comparison

2025 was defined by a dramatic "rise and fall" trajectory across all sectors. A steady first half gave way to a universal Q3 surge, where industries like Hospitality and Insurance hit record highs. However, this momentum proved fragile, crashing in a synchronized Q4 correction that erased all mid-year gains and dragged every major industry back to its lowest satisfaction levels of the year due to economic and operational pressures.

Industry	Q1	Q2	Q3	Q4
Hotel and Hospitality	44	38	56	38
Grocery Retail	37	34	49	32
Big Box Retail	37	32	42	31
Banking and Credit Unions	41	33	51	26
Airlines	33	37	50	22
Insurance	23	22	54	17
Automotive	41	30	44	12

Insights

In Q4, Hotel & Hospitality (38) and Grocery Retail (32) proved the most resilient, returning to their early-year baselines despite significant drops. This suggests consumers remained more forgiving of essential and experiential services. Big Box Retail also held steady above 30, cushioned by its bulk-value proposition.

Conversely, Automotive (12) and Insurance (17) suffered collapses, ending as the lowest-rated sectors. Insurance saw the most extreme volatility, plummeting from a Q3 high of 54. This massive correction likely indicates that high-ticket bore the brunt of end-of-year consumer frustration.

In Automotive, a drop from 44 to 12 in Q4 2025 is a clear red flag and reflects a broader industry correction. The decline was likely driven by the loss of EV purchase incentives, tariff-related price increases on vehicles and parts, and growing frustration with EV infrastructure and software reliability.

Overall, the synchronized Q4 crash confirms the "Q3 Boom" was a temporary anomaly. By year-end, economic fatigue caused a universal reset in customer tolerance, punishing every sector regardless of prior performance.

Question: "How likely are you to recommend X to your friends or colleague?"

Scale: From "0 = not at all likely" to "10 = extremely likely"

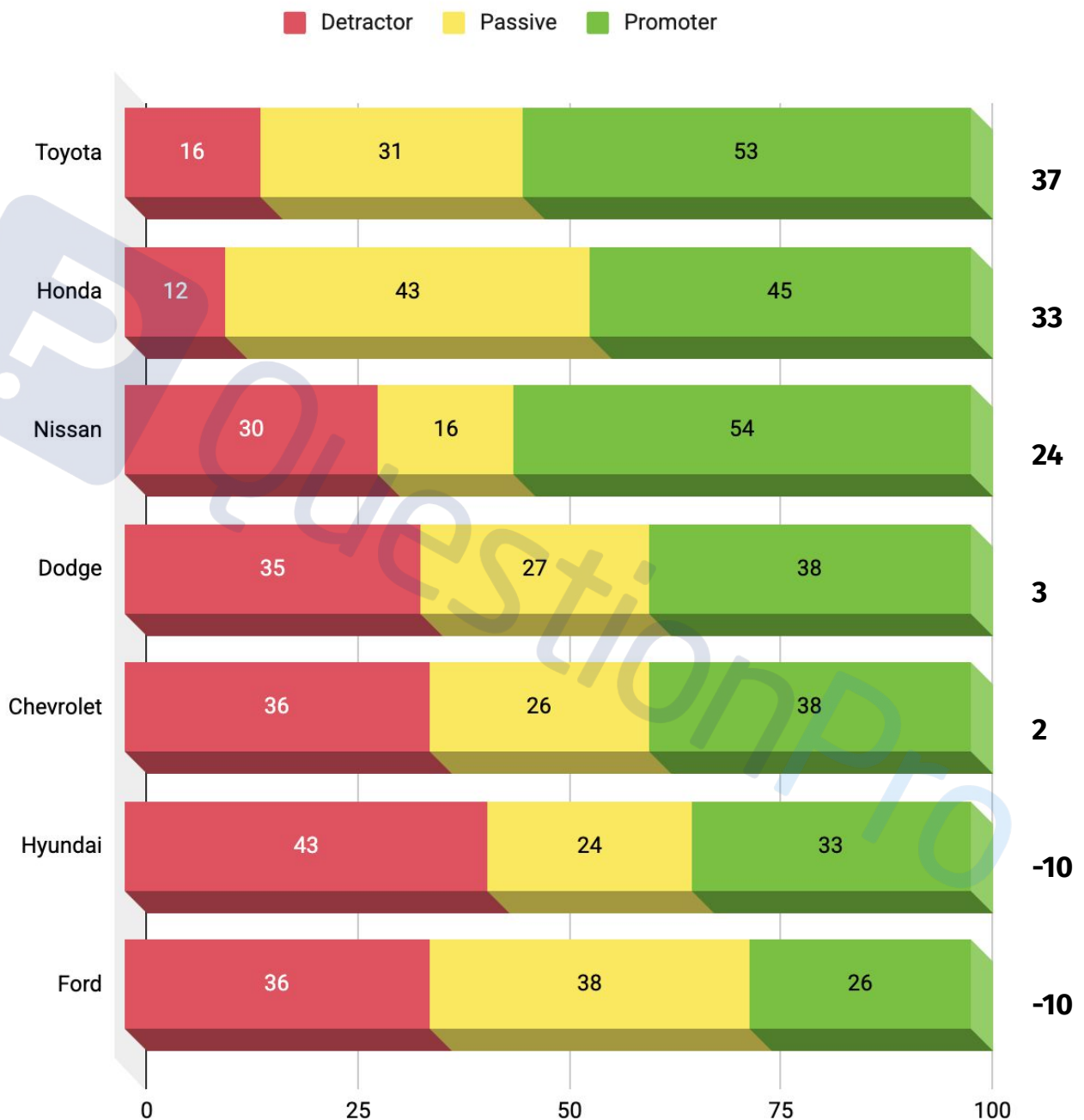
Promoters = 10 and 9, Passives = 8 and 7, Detractors = 6 to 0 | NPS = % share promoters - % share detractors



Q4 2025

Net promoter score (NPS) by brands in the automotive industry

Toyota and Honda lead the pack with healthy positive scores of 37 and 33 respectively, indicating a solid base of loyal drivers. Conversely, Hyundai and Ford have skidded into negative territory, both sitting at -10, which signals a critical challenge where dissatisfied customers outnumber the advocates.



Q4. Net promoter score (NPS) by brands in the automotive industry

NPS Quarterly Comparison

The automotive industry in 2025 was defined by a widening gap between reliable market leaders and domestic legacy brands struggling with quality assurance. Toyota and Honda maintained a "blue chip" status throughout most of the year, driven by strong hybrid lineups and trusted reliability. In contrast, American manufacturers like Ford and Chevrolet faced significant volatility.

Automotive	Q1	Q2	Q3	Q4
Toyota	67	52	54	37
Honda	57	58	59	33
Nissan	19	31	46	24
Chevrolet	48	29	34	2
Ford	32	6	34	-10

Insights

In Q4, even the top-rated brands—Toyota (37) and Honda (33)—could not escape a sector-wide downturn, shedding significant sentiment gains accumulated in Q2 and Q3. While they maintained their relative leadership positions, the sharp double-digit drops from their Q3 highs (54 and 59 respectively) suggest that macroeconomic pressures, such as year-end inventory shortages for popular hybrid models and high interest rates, finally pierced the "reliability halo" that had previously insulated them from buyer frustration.

The lowest-rated domestic brands—Ford (-10) and Chevrolet (2)—suffered a collapse in Q4, surrendering all stability achieved in the previous quarter. Ford’s plunge into negative territory marks a critical failure point, likely driven by "recall fatigue" and service backlog frustrations reaching a breaking point at year end.

These contrasts suggest that in Q4, customer patience for any friction disappeared. The universal decline across all brands implies that the purchasing environment itself became toxic (high costs, difficult financing), but the severity of the drop for domestic brands indicates that customers punished perceived quality issues, widening the gap between merely "expensive" reliable cars and "risky" domestic investments.

Question: "How likely are you to recommend X to your friends or colleague?"

Scale: From "0 = not at all likely" to "10 = extremely likely"

Promoters = 10 and 9, Passives = 8 and 7, Detractors = 6 to 0 | NPS = % share promoters - % share detractors





Insights Engineered for Impact.

Your All-in-One Customer Feedback Management Platform.



CX Edition

Collect, manage, and act on customer feedback, built to power every stage of the CX.

Unlimited Dashboards

Real-time insights at your fingertips to track key metrics, uncover trends, and share CX impact across your organization.

Intercept

Engage customers with real-time web pop-ups to capture feedback at key moments.

Journey Management

Visualize and optimize every touchpoint in your customer's journey to drive loyalty and reduce friction.

ClosedLoop

Fix customer issues fast with a built-in ticketing system: track complaints, assign ownership, and close the loop.

OuterLoop

Identify and prioritize systemic CX issues, fix root causes and drive long-term improvements.

"Understand customer journeys, drive **meaningful action**" —Ken Peterson

Learn more at:
questionpro.com/cx

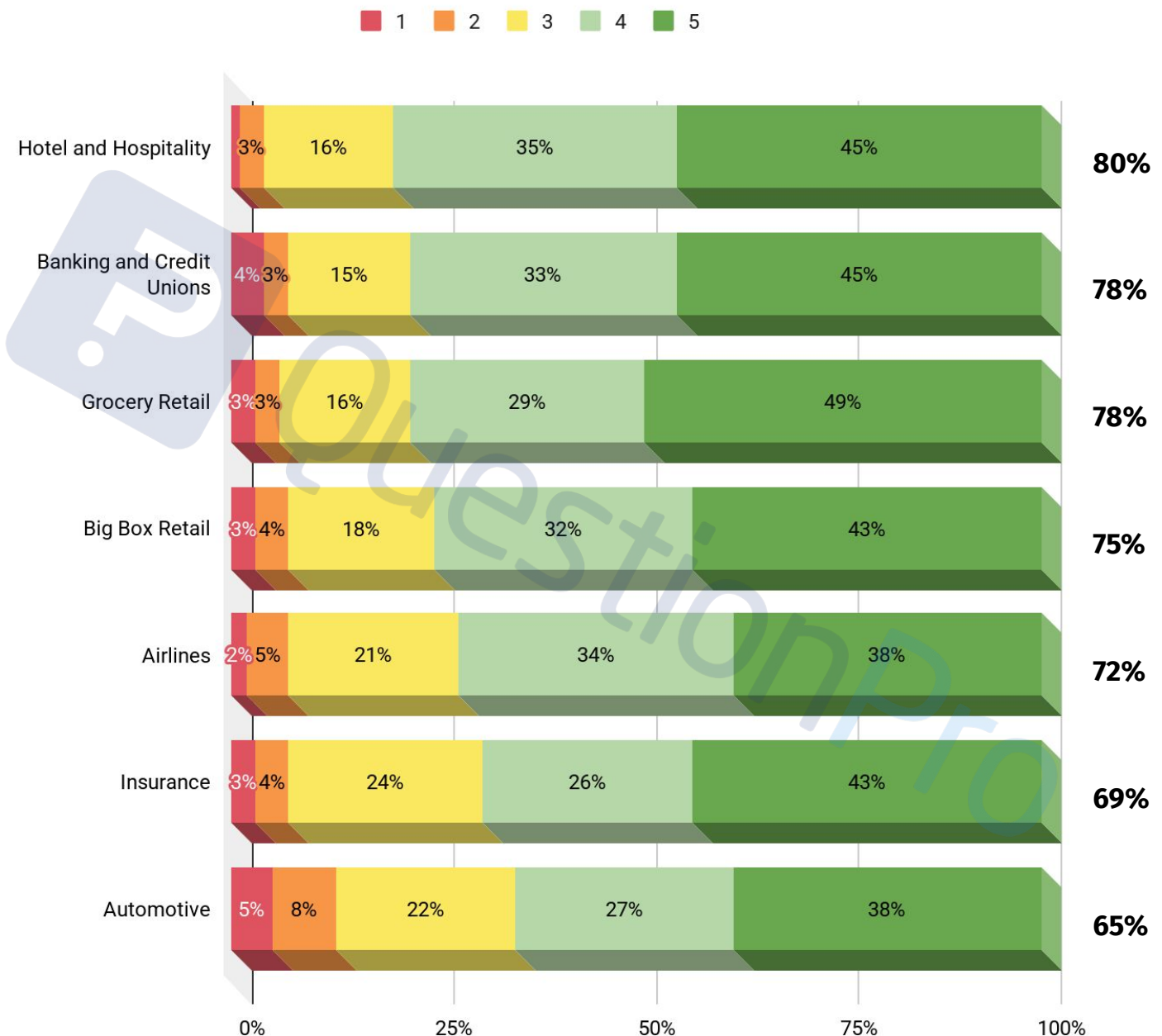


Customer satisfaction score (CSAT)

Q4 2025

Customer satisfaction score (CSAT) by industry

Hotel and Hospitality leads in customer satisfaction with a top-box score of 80%, closely followed by Banking and Grocery Retail at 78%. In contrast, the Automotive sector shows the lowest performance at 65%, indicating significantly weaker customer sentiment compared to the other industries.



Q4. Customer satisfaction score (CSAT) by industry

CSAT Quarterly Comparison

Customer satisfaction scores in 2025 followed a nearly universal "summer peak, winter crash" pattern. While Q3 served as a high-water mark for customer satisfaction across all sectors—likely driven by summer optimism and seasonal promotions—Q4 brought a sharp reality check, with every major industry posting declines as operational pressures and end-of-year financial fatigue probably weighed heavily on consumer sentiment.

Industry	Q1	Q2	Q3	Q4
Banking and Credit Unions	82	78	87	80
Hotel and Hospitality	79	74	85	78
Grocery Retail	78	79	84	78
Big Box Retail	76	77	83	75
Insurance	77	79	85	72
Airlines	70	65	82	69
Automotive	76	67	84	65

Insights

In Q4, the Automotive sector experienced the most severe volatility, plummeting to 65 (down from a Q3 peak of 84). This massive 19-point drop suggests that the "tariff bump" enthusiasm likely evaporated, leaving buyers to face high interest rates and dealer markups that probably soured the purchase experience. Similarly, Airlines (69 down from 82) and Insurance (72 down from 85) saw double-digit corrections, implying that operational strains during holiday travel and end-of-year premium adjustments likely eroded the goodwill built up during the summer.

Conversely, Banking and Credit Unions (80) and Grocery Retail (78) demonstrated the most resilience, declining less severely than discretionary categories. This relative stability suggests that essential service providers likely maintained better operational consistency than retail or hospitality sectors, which probably struggled with seasonal staffing shortages.

The data indicates a clear seasonal psychology where customers rewarded industries that could maintain "business as usual" during the chaotic Q4 window, while heavily penalizing those that allowed service levels to slip.

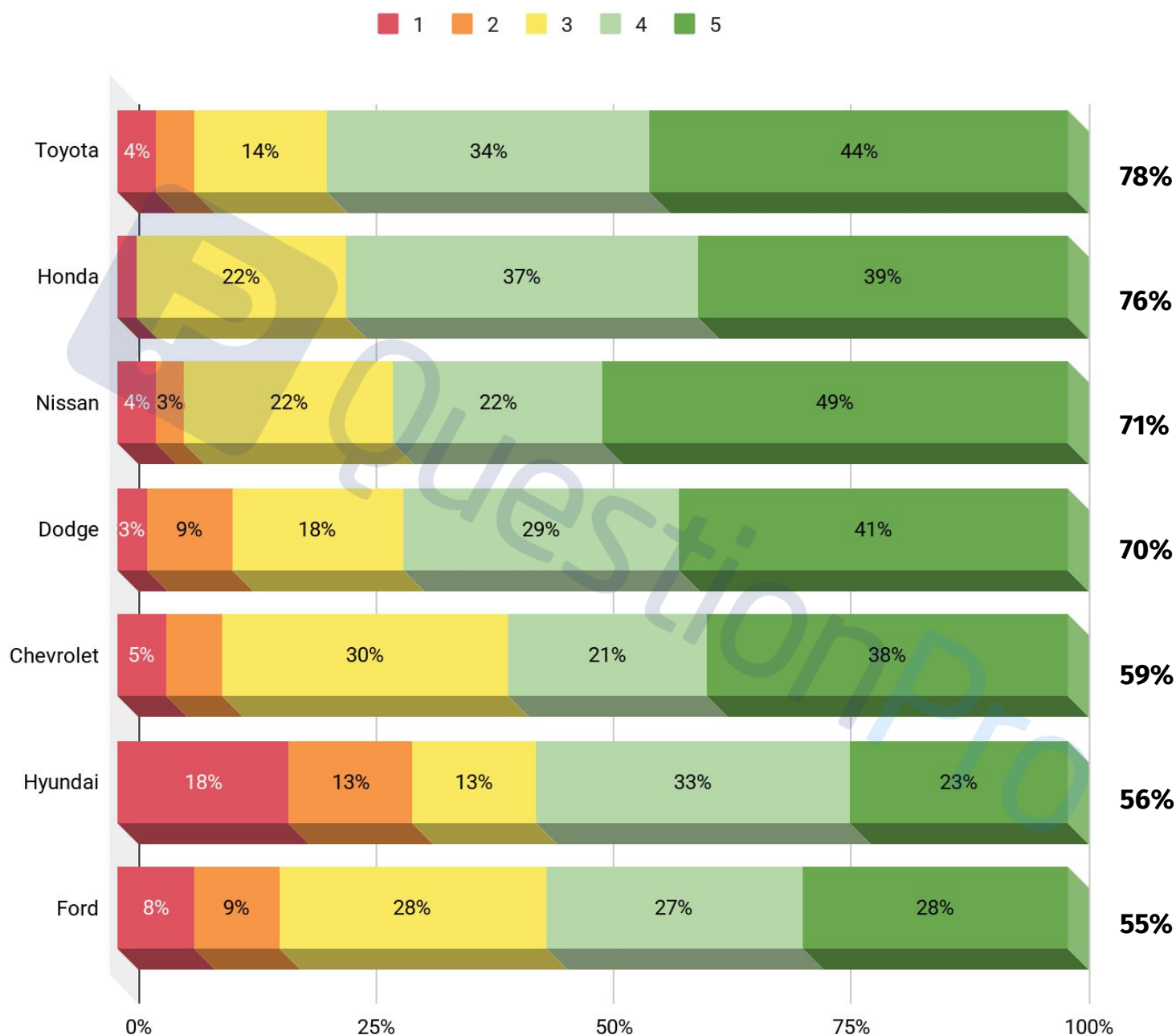
Question: "How satisfied are you with X?"
 Scale: From "1 = very dissatisfied" to "5 = very satisfied"
 CSAT Score = (% of responses rated 4 or 5) × 100



Q4 2025

Customer satisfaction score (CSAT) by brands in the automotive industry

Toyota takes the top spot with a 78% customer satisfaction rating, followed closely by Honda at 76%. Conversely, Ford (55%) and Hyundai (56%) rank at the bottom, revealing a wide 23-point gap in customer sentiment between the highest and lowest performing car brands.



Q4. Customer satisfaction score (CSAT) by brands in the automotive industry

CSAT Quarterly Comparison

While inventory levels normalized, a stark performance gap emerged between top-performing import brands—led by Toyota and Honda—and domestic volume leaders like Ford and Chevrolet, which saw satisfaction scores plummet in Q4 likely due to rising costs and dealer transparency issues.

Automotive	Q1	Q2	Q3	Q4
Toyota	83	76	91	78
Honda	78	81	90	76
Nissan	74	75	87	71
Chevrolet	82	59	71	59
Ford	74	61	79	55

Insights

In Q4, the industry saw broad declines rather than rebounds, with Toyota (78 from 91) and Honda (76 from 90) posting the most resilient scores despite double-digit drops from their Q3 peaks, while Nissan (71 from 87) and Chevrolet (59 from 71) faced steeper corrections. Ford ended the year with the lowest recorded satisfaction, dropping to 55 from 79, marking the most significant quarterly deterioration among major brands.

In Q4 the top-rated brands—Toyota (78) and Honda (76)—benefited from their dominance in the hybrid sector and reputation for reliability, which insulated them somewhat from the broader market's "affordability crunch". Despite the quarter-over-quarter dip, these brands maintained a leadership position by delivering consistent sales transparency and high vehicle dependability, whereas the "tariff bump" that accelerated sales earlier in the year faded, leaving a market defined by cautious spending.

The lowest-rated brands—Chevrolet (59) and Ford (55)—likely suffered from a widening "transparency gap" and dealer profitability pressures that negatively impacted the purchase experience.

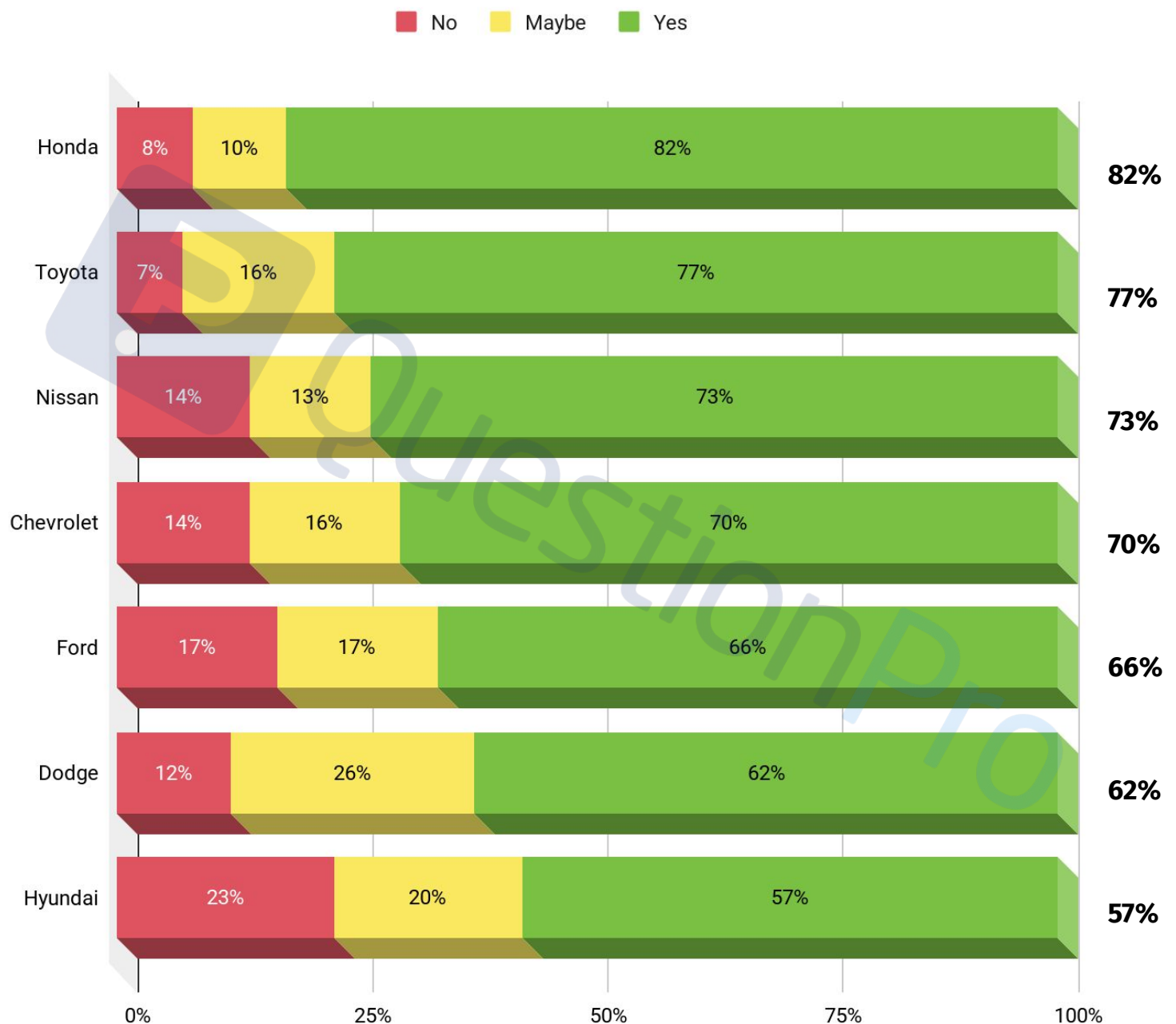


Future purchase intent

Q4 2025

Future purchase intent by brands in the automotive industry

Honda leads the automotive category with the highest future purchase consideration at 82% and a low refusal rate of just 8%. Toyota follows as a strong second with 77% definitive interest, while Hyundai trails significantly with the lowest "Yes" score of 57%. The American brands (Ford, Chevrolet, Dodge) cluster in the middle, showing moderate buying interest levels between 62% and 70%.



Q4. Future purchase intent by brands in the automotive industry

Purchase Intent Quarterly Comparison

In 2025, the automotive market experienced significant volatility in its final quarter, with Honda emerging as the purchase intent leader (82%) by successfully navigating the industry-wide slowdown that hampered its competitors. While the first three quarters saw intense competition between Toyota and Ford, Q4 proved decisive as widespread affordability pressures and inventory constraints caused major domestic and legacy leaders to falter.

Automotive	Q1	Q2	Q3	Q4
Honda	74	80	82	82
Toyota	83	82	88	77
Nissan	63	78	67	73
Chevrolet	77	71	74	70
Ford	70	72	79	66

Insights

Research highlights a transition to reliability and availability in Q4, where brands that maintained steady inventory and value propositions, like Honda and a rebounding Nissan, captured the interest of buyers fatigued by record-high transaction prices.

Honda demonstrated remarkable stability throughout 2025, climbing from 74% in Q1 to finish the year tied for the top spot at 82%. This consistent performance in Q4 contrasts sharply with the broader market's decline; while competitors struggled with tight supply, Honda maintained a healthy inventory level allowing it to capture demand without aggressive markups. Conversely, Toyota peaked in Q3 with a dominant 88% intent score but suffered a sharp 11-point drop to 77% in Q4. This Q4 decline was likely driven by severe inventory shortages and high pricing that alienated budget-conscious shoppers during the holiday season.

Ford experienced the most dramatic volatility, surging to 79% in Q3 before tumbling to 66% in Q4. Meanwhile, Nissan was a notable outlier in the fourth quarter, rebounding from a Q3 low of 67% to 73% in Q4. This late-year surge was fueled by exceptional performance in its truck and SUV segments, drawing in buyers looking for capable vehicles outside of the pricier market leaders.

The Future Purchase Intent follow-up metric captures post-purchase loyalty by asking recent buyers, "How likely are you to purchase again from [Brand]?" Responses are reported as:
 % Likely to Repurchase (Yes): Strong future intent
 % At Risk (No): Potential churn signal
 % Undecided (Maybe): Opportunity for brand reinforcement



Study profile

Study profile

Objective of the study

Benchmarking data for NPS, CSAT, and future purchase intent across seven industries and their top brands.

Survey method

Structured online interviews in the QuestionPro Audience platform.

Target group

Participants aged 18 and over who live in the United States and are involved in purchasing decisions for products and services on their own or with others.

Sample

1,001 participants

Survey period

November 2025

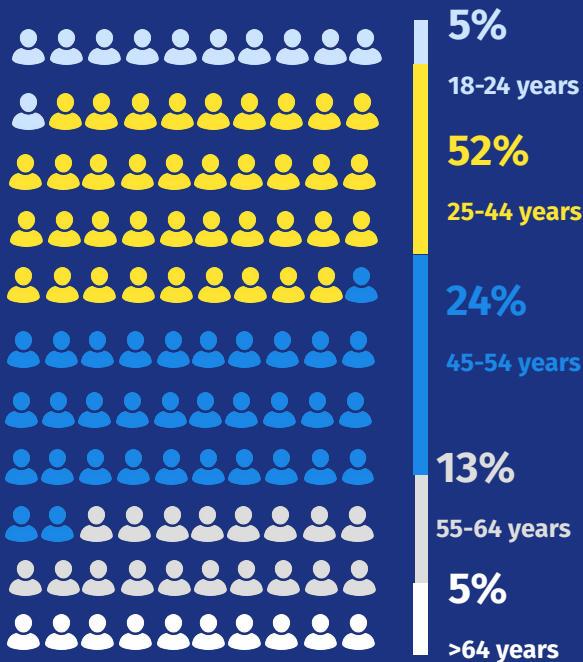
Gender



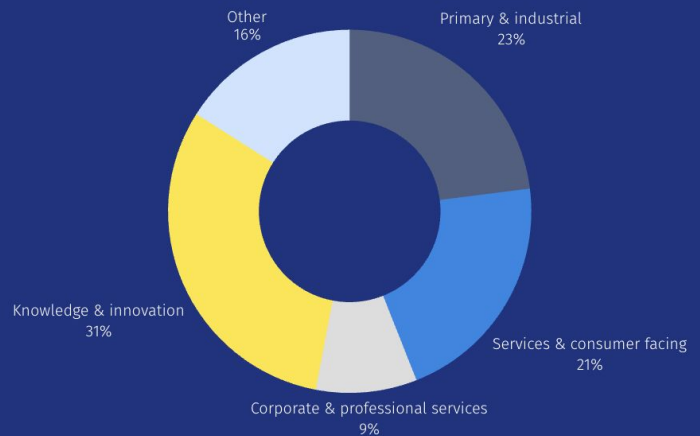
Job status



Age



Working industry by type and function



About QuestionPro

Acknowledged as a pivotal Customer Experience management platform by industry leaders such as Gartner, Forrester, and Quadrant Knowledge Solutions, QuestionPro CX is a customer-centric survey, analytics, and customer journey management platform.

We help you turn CX initiatives into competitive advantages, provide clear ROI and experiences that consistently exceed customer expectations.

With more than 5 million customers in over 100 countries, QuestionPro's main areas of activity are Customer Experience, Employee Experience and Market Research.

We are the only solution in the market to have all 3 components of the CX ecosystem:

- Customer journey management
- CX & VoC measurement and live tracking
- ClosedLoop feedback ticketing system

More than that, we have an amazing team of experts who can partner with you from vision to execution.



Let's connect!

Ken Peterson

President, Customer Experience

kenneth.peterson@questionpro.com

Got 30 Seconds?

Take a 3-question survey, your feedback guides our next CX Metrics Benchmarking Report—topics, depth, and brands to cover.

TAKE SURVEY

QuestionPro Inc
Austin, United States
www.questionpro.com