

# Benchmarking **Big Box Retail** CX Metrics 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

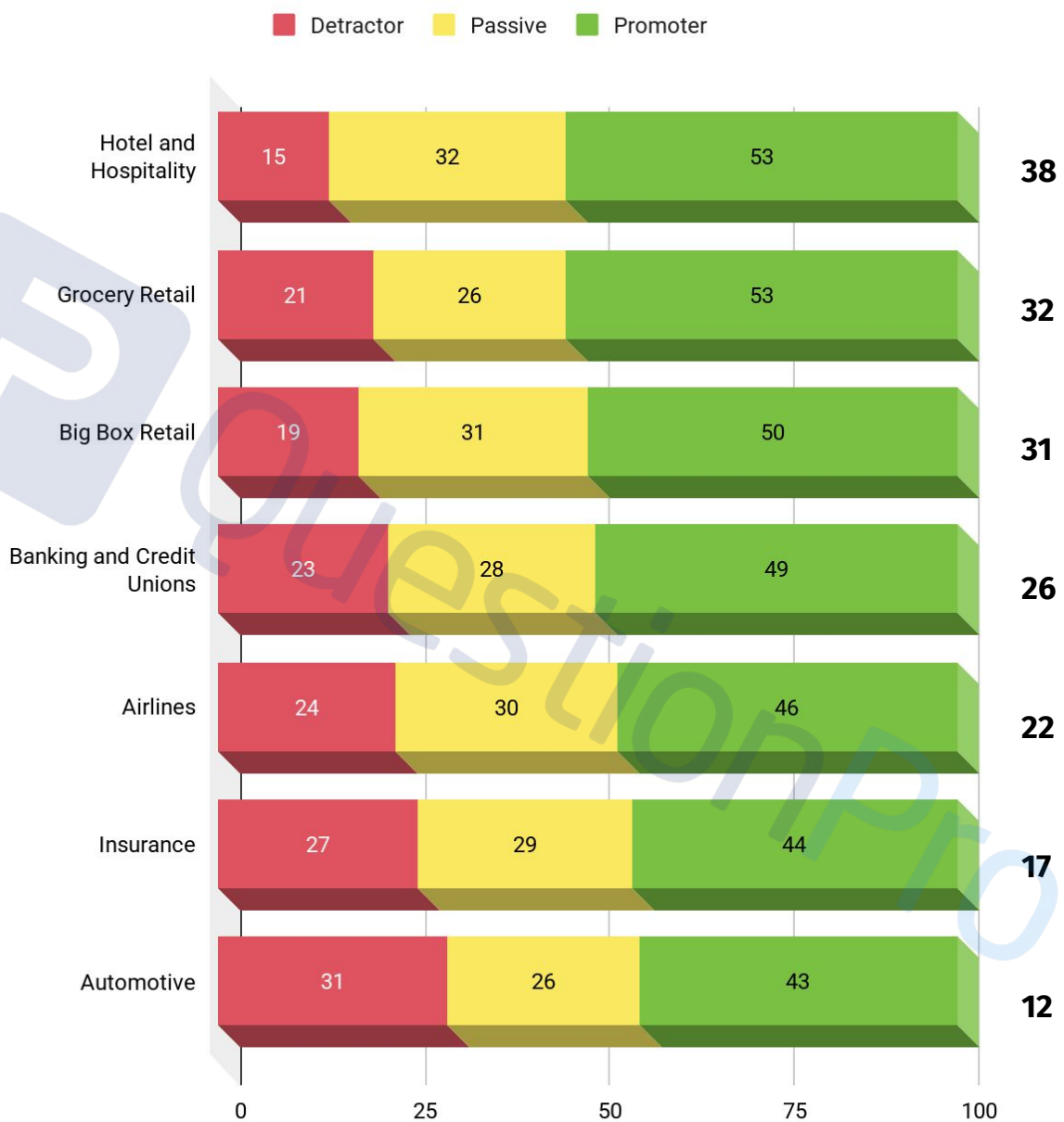
A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively an organization is achieving its key business objectives. In benchmarking, KPIs are used to compare an organization's performance against industry standards or best practices to identify areas for improvement.

- 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"

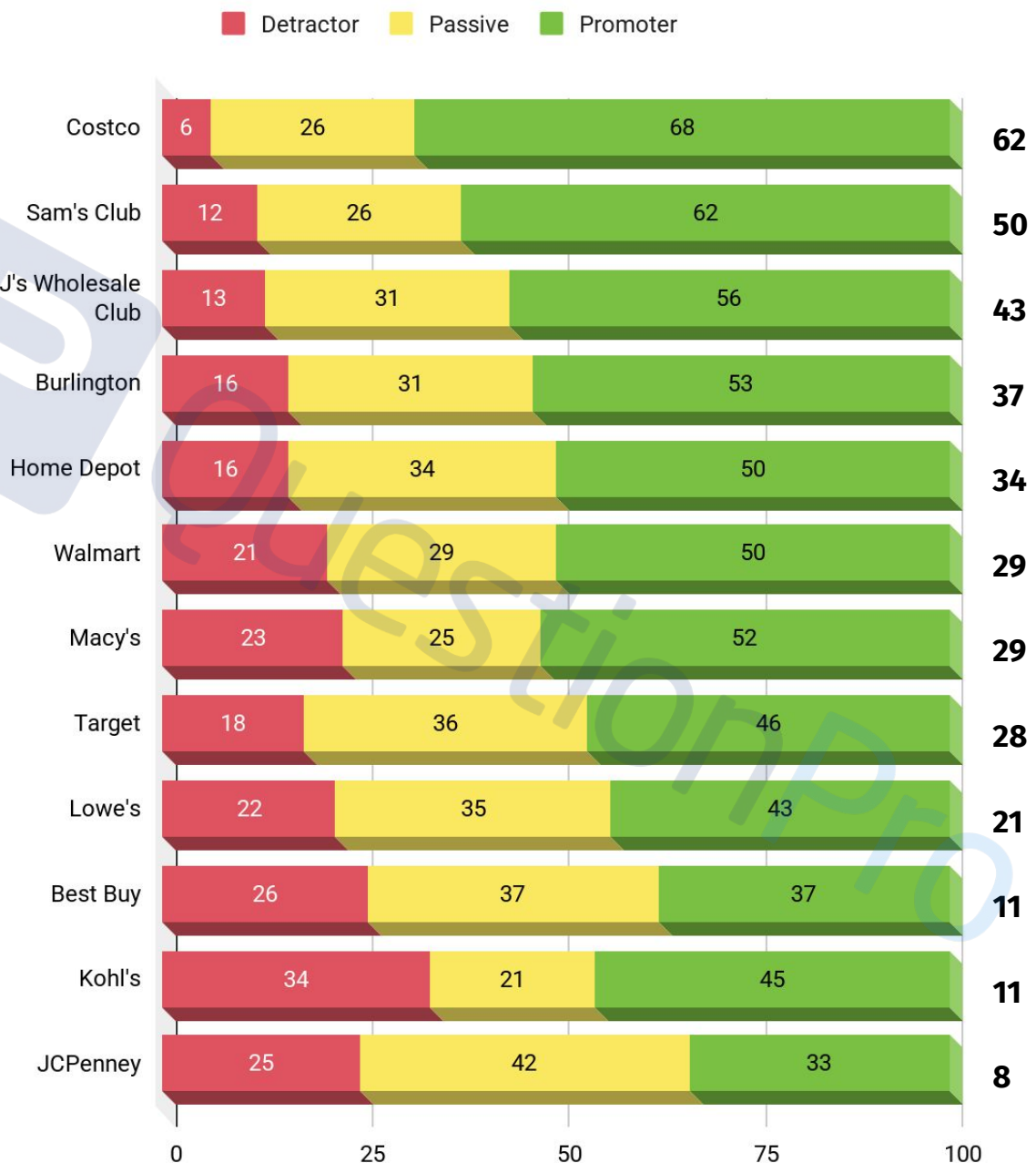
Promoters = 10 and 9, Passives = 8 and 7, Detractors = 6 to 0 | NPS = % share promoters - % share detractors



# Q4 2025

## Net promoter score (NPS) by brands in the **big box retail** industry

Costco (62) and Sam's Club (50) command the retail sector with impressive loyalty scores, setting the gold standard. In contrast, traditional department stores like JCPenney (8) and Kohl's (11) represent the segment's lower tier, struggling alongside Best Buy (11) to generate comparable customer enthusiasm.



## Q4. Net promoter score (NPS) by brands in the **big box retail** industry

### NPS Quarterly Comparison

In Q4, the retail sector bifurcated sharply, creating a "winner-take-all" dynamic for warehouse clubs. Costco (62) and Sam's Club (50) successfully defied the industry-wide downturn, with Costco holding its yearly high and Sam's Club actually growing its score. This resilience suggests that during a holiday season defined by inflation fatigue and tariff fears, the membership model acted as a protective moat.

Big box retail	Q1	Q2	Q3	Q4
Costco	52	62	58	62
Sam's Club	42	37	49	50
Home Depot	43	41	42	34
Walmart	30	27	43	29
Macy's	35	26	48	29
Target	33	29	42	28
Lowe's	29	30	41	21
Best Buy	43	9	33	11
Kohl's	32	25	38	11
JCPenney	39	16	31	8

### Insights

Shoppers consolidated their spending with retailers that offered consistent value and bulk savings, rather than chasing sporadic sales at traditional stores. The "middle market" retailers—Walmart (29), Target (28), and Macy's (29)—saw their massive Q3 gains evaporate, falling back to or below their Q1 baselines. The data reveals that the Q3 spikes (where Walmart reached 43 and Macy's 48) were likely a "false dawn" driven by early promotions or back-to-school spending that couldn't be sustained. As the truncated 2025 holiday shopping window added pressure, these brands struggled with operational friction and inventory issues that frustrated late-season shoppers.

The most alarming collapse occurred in the traditional department and specialty store segments. JCPenney cratered to single digits (8), and Kohl's and Best Buy plummeted to 11, marking them as the biggest casualties of Q4. This "race to the bottom" indicates that for discretionary, non-essential purchases, customer patience was non-existent. The extreme volatility suggests a failure in fulfilling holiday demand, likely due to stock-outs or delivery failures that alienated buyers at the critical moment.

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





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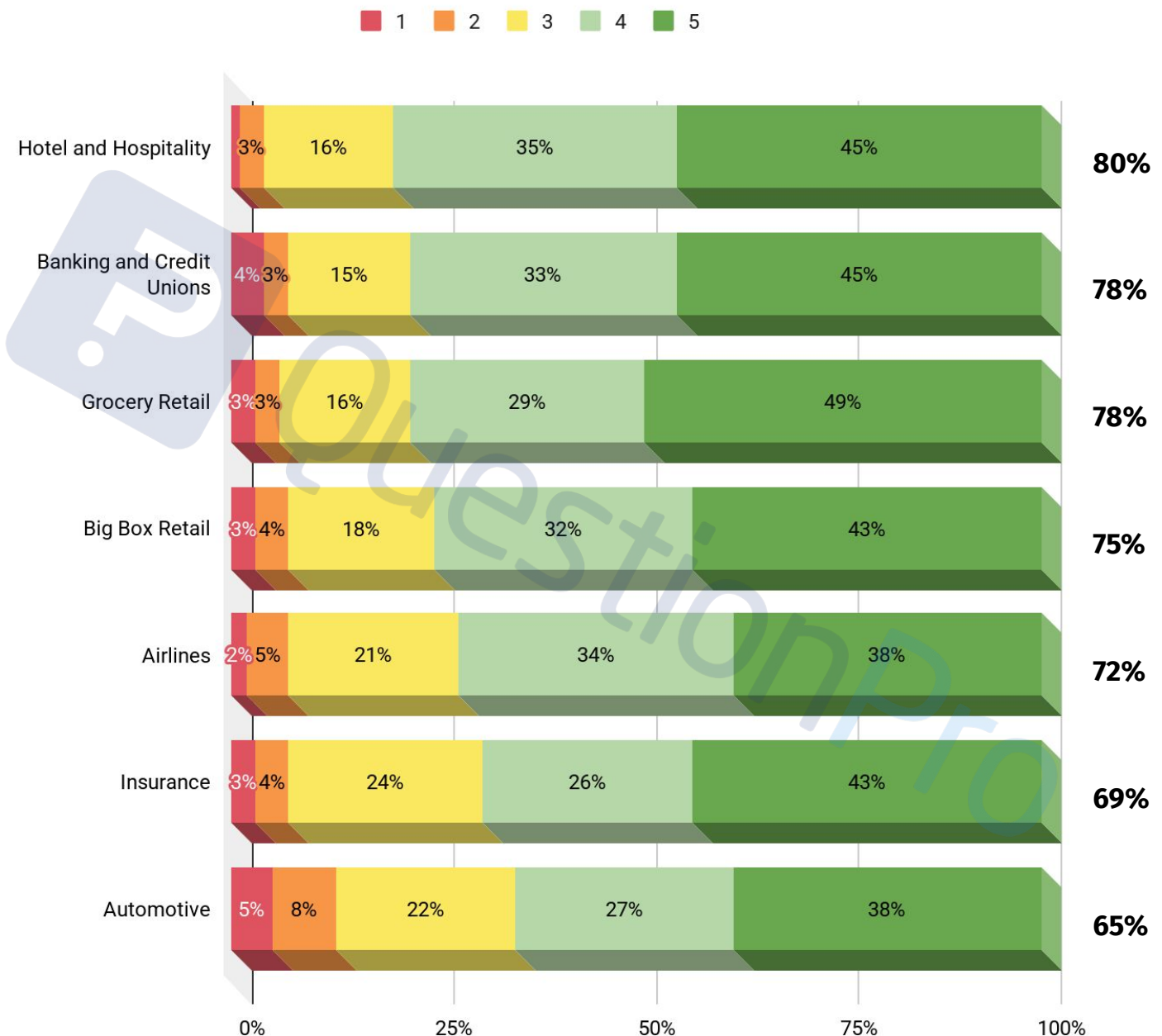


# Customer satisfaction score (CSAT)

# 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.

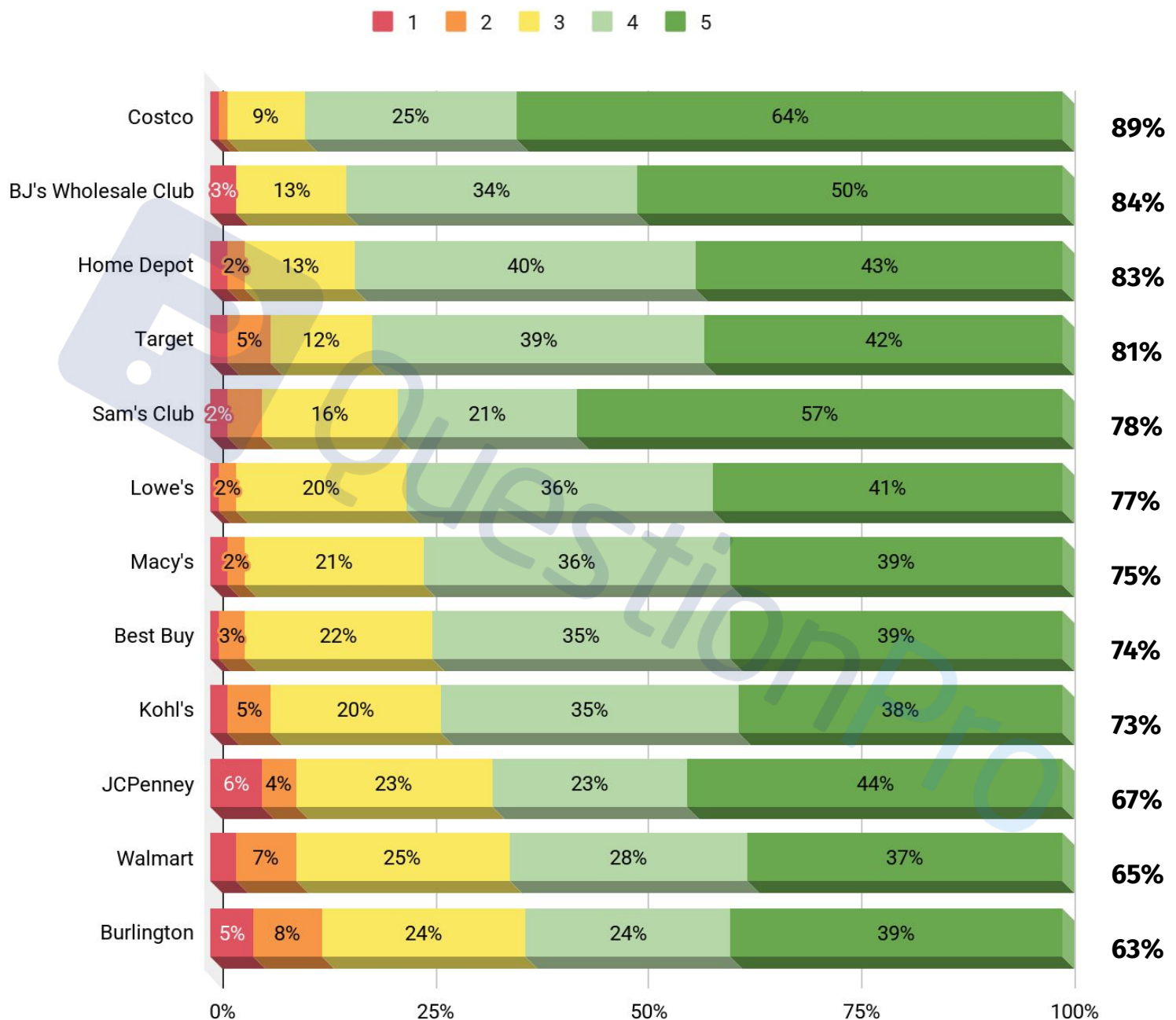
Question: "How satisfied are you with X?"  
 Scale: From "1 = very dissatisfied" to "5 = very satisfied"  
 CSAT Score = (% of responses rated 4 or 5) × 100



# Q4 2025

## Customer satisfaction score (CSAT) by brands in the **big box retail** industry

Costco is the clear leader with an impressive 89% customer satisfaction rating, significantly driven by its high percentage of top-tier reviews. BJ's Wholesale Club and Home Depot also perform strongly at 84% and 83%, respectively. Conversely, Walmart (65%) and Burlington (63%) received the lowest satisfaction scores among the major retailers surveyed.



## Q4. Customer satisfaction score (CSAT) by brands in the **big box retail** industry

### CSAT Quarterly Comparison

The Big Box Retail sector experienced a significant "holiday hangover" in Q4, with satisfaction scores dropping sharply after a strong Q3.

While summer volume likely drove earlier peaks, the data suggests that the intense operational pressure of the Q4 holiday season probably overwhelmed retailers, causing widespread friction in service and inventory availability.

Big box retail	Q1	Q2	Q3	Q4
Costco	87	89	90	89
Home Depot	82	83	85	83
Target	78	76	82	81
Sam's Club	85	79	89	78
Lowe's	77	82	83	77
Macy's	87	73	75	75
Best Buy	87	72	83	74
Kohl's	74	74	84	73
JCPenney	88	64	79	67
Walmart	69	72	78	65

### Insights

In Q4, mass-market retailers saw double-digit corrections, with Walmart (65 down from 78) and JCPenney (67 down from 79) posting the steepest declines. This volatility implies that staffing shortages and shelf gaps during the peak shopping window likely alienated customers who had rewarded these brands earlier in the year.

Sam's Club also stumbled significantly (78 down from 89), a sharp contrast to its direct competitor, suggesting that internal logistics struggles probably impacted the member experience more severely than anticipated.

Conversely, Costco remained the industry gold standard, holding steady at 89 (statistically flat from 90). This remarkable stability suggests that its supply chain mastery and consistent operational model likely insulated it from the seasonal chaos that dragged down peers like Best Buy (74 down from 83) and Kohl's (73 down from 84). The data indicates that in Q4, shoppers probably prioritized reliability above all else, maintaining loyalty to brands that could guarantee product availability while severely punishing those that faltered under seasonal demand.

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

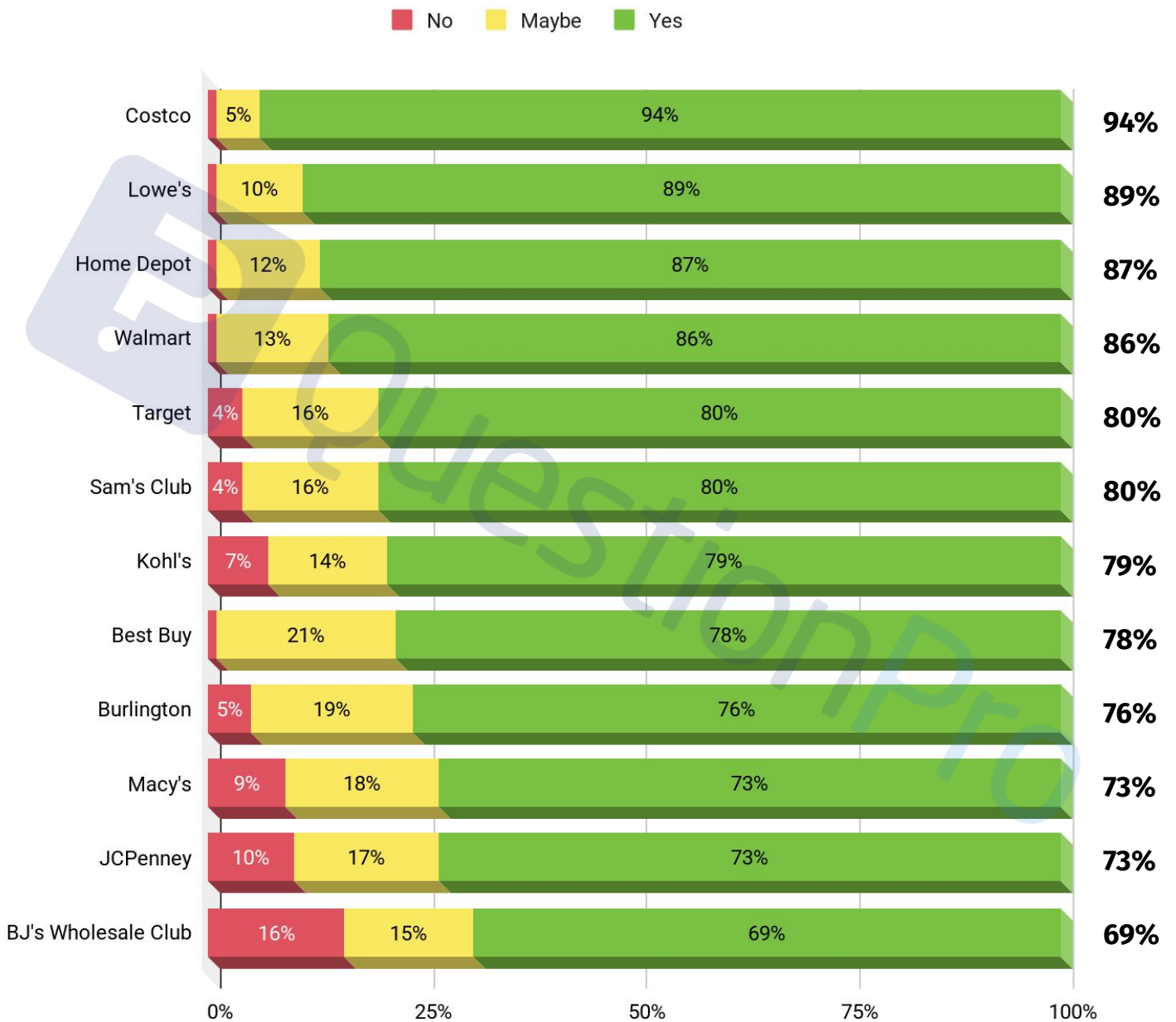


# Future purchase intent

# Q4 2025

## Future purchase intent by brands in the **big box retail** industry

Costco achieves the highest future purchase consideration among big box retailers at an impressive 94%. Home improvement giants Lowe's and Home Depot also show strong consumer intent with 89% and 87% respectively, while BJ's Wholesale Club sits at the bottom of the list with 69% definitive interest and the highest refusal rate of 16%.



## Q4. Future purchase intent by brands in the big box retail industry

### Purchase Intent Quarterly Comparison

Costco was the only major retailer to post a Purchase Intent gain (94 from 89), while Target (80 from 89) and Sam's Club (80 from 89) experienced the steepest declines, followed by Walmart (86 from 92).

Big box retail	Q1	Q2	Q3	Q4
Costco	88	92	89	94
Lowe's	87	90	93	89
Home Depot	90	88	91	87
Walmart	92	90	92	86
Target	88	83	89	80
Sam's Club	84	83	89	80
Kohl's	81	77	88	79
Best Buy	80	73	79	78

### Insights

In Q4, Costco (94) dominated the sector by leveraging its membership model and "treasure hunt" appeal to attract inflation-weary holiday shoppers seeking bulk value. Its success contrasts sharply with competitors, as it achieved an 8% increase in net sales and high renewal rates (90%), effectively insulating itself from the broader pullback in discretionary spending.

The declining brands faced distinct headwinds. Target (80) struggled significantly with soft demand for non-essential goods, as inflation-pressured consumers reduced visits and discretionary purchases. In the home improvement sector, Lowe's (89) and Home Depot (87) saw intent cool as high interest rates and a stagnant housing market stalled large renovation projects, leading both to cut profit guidance earlier in the quarter. Walmart's drop (86 from 92) suggests that even value leaders faced "shopping fatigue" after a strong Q3, with shoppers becoming increasingly selective during the holiday rush.

These contrasts suggest that in the final quarter of 2025, consumers prioritized essential value and membership perks, punishing retailers reliant on discretionary impulse buys or large-scale financing.

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

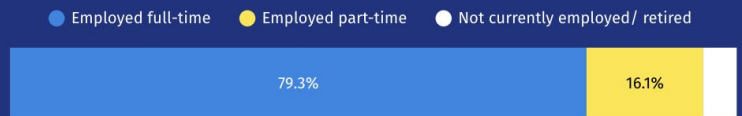
## Survey period

November 2025

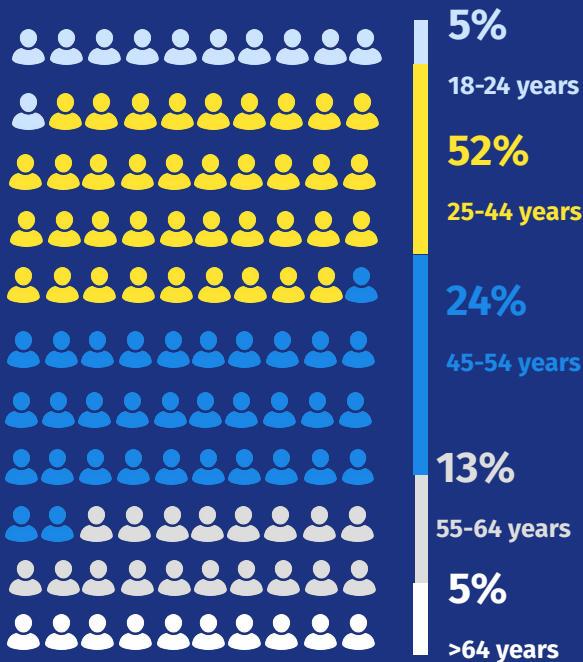
## Gender



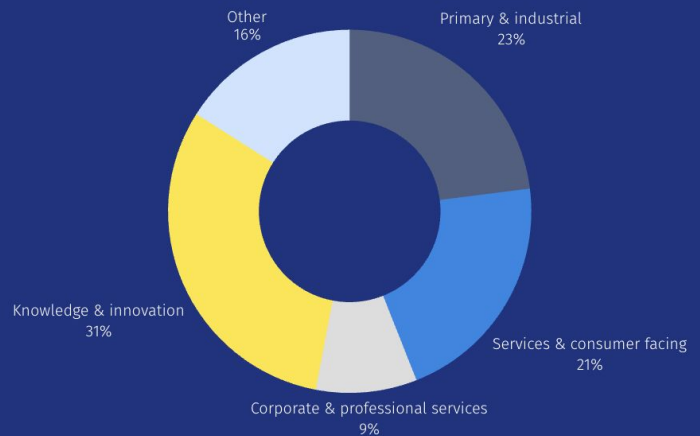
## Job status



## 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.

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**Ken Peterson**

President, Customer Experience

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