

# Benchmarking **Grocery 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.

# Key Performance Indicators

Net promoter score (NPS) by industry

Net promoter score (NPS) by brands

Customer satisfaction score (CSAT) by industry

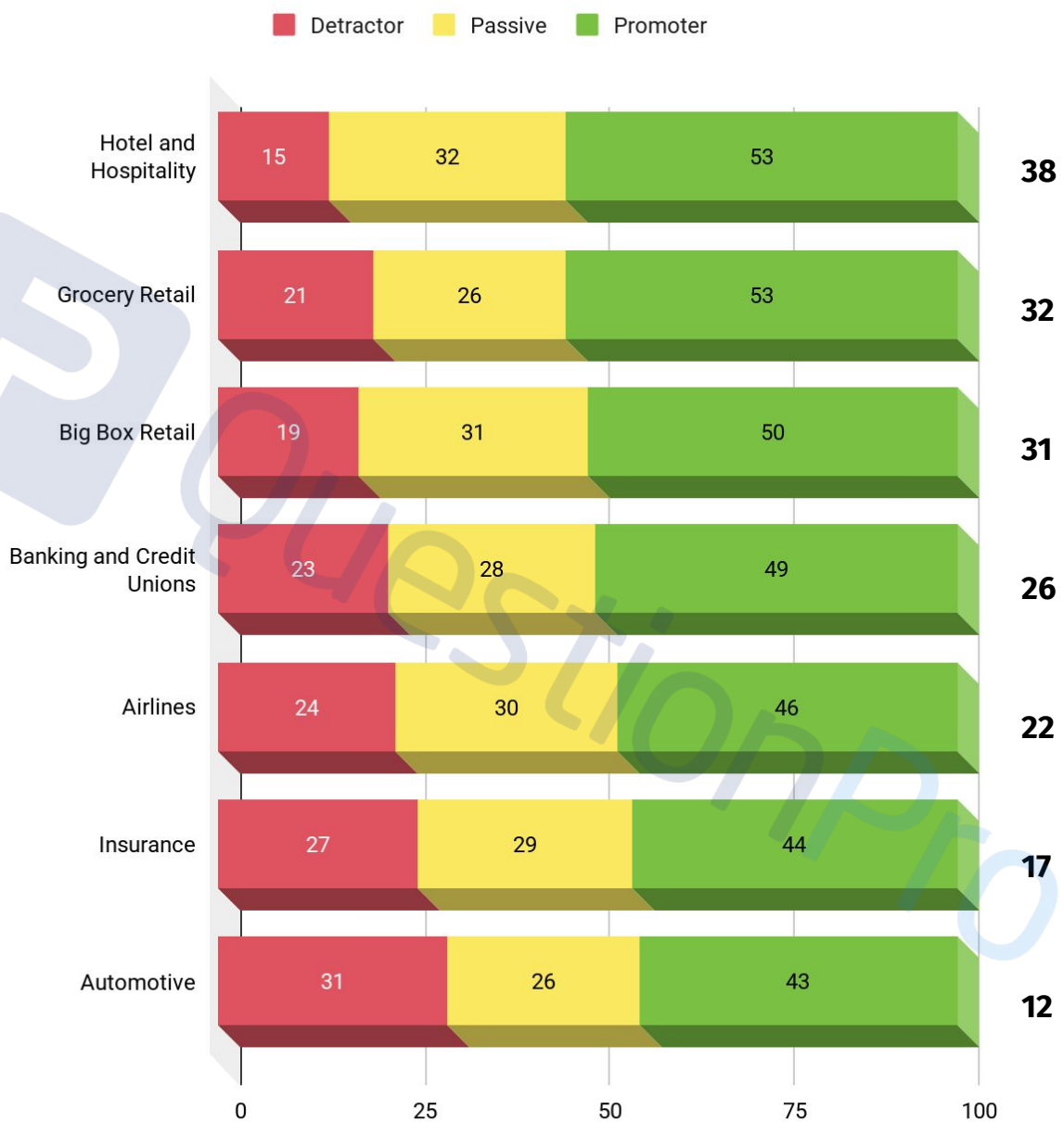
Customer satisfaction score (CSAT) by brands

Future purchase intent by brands

# 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"

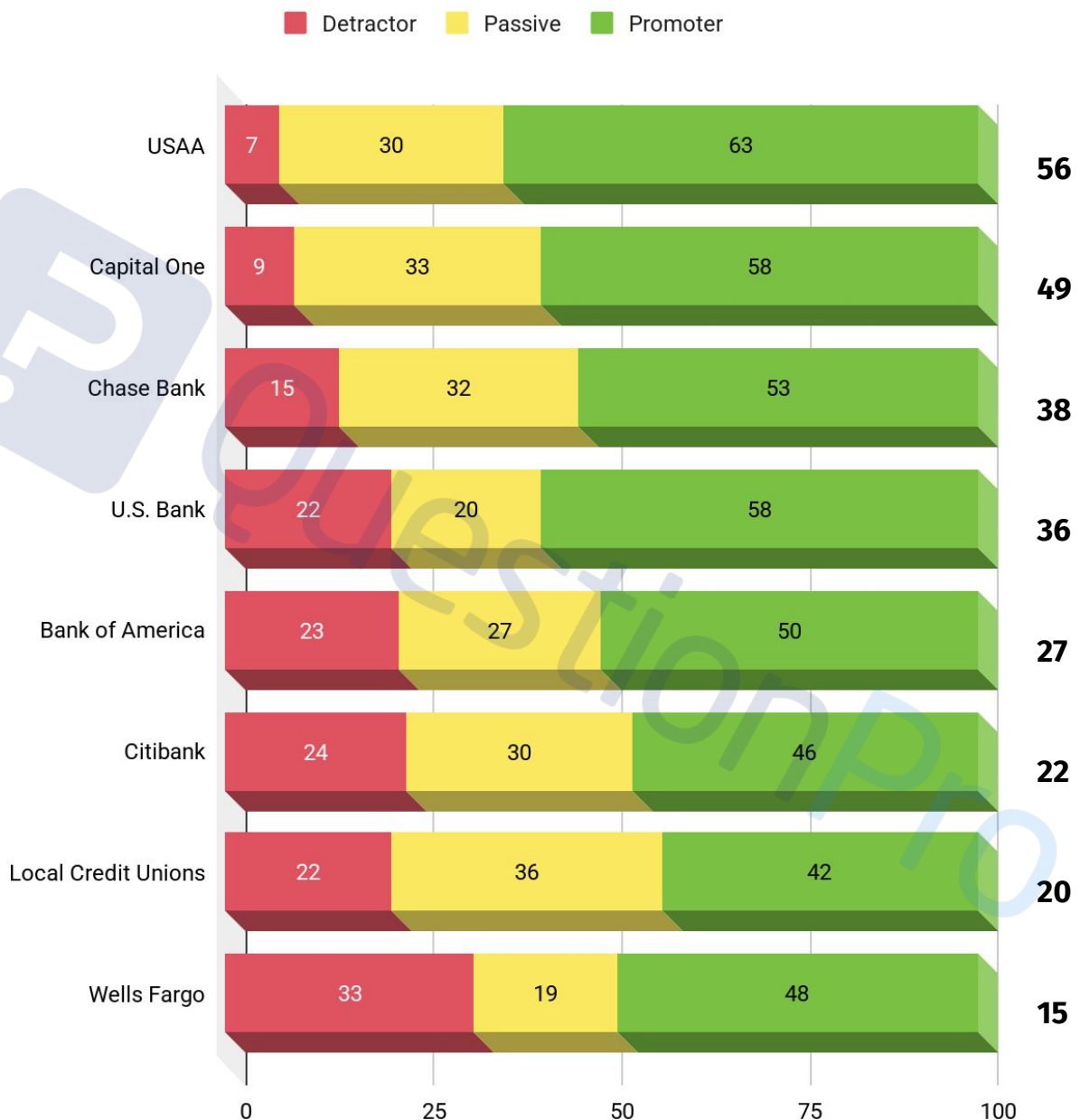
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# Q4 2025

## Net promoter score (NPS) by brands in the **banking and credit unions** industry

USAA (56) and Capital One (49) have established themselves as the clear leaders in customer satisfaction, driving the highest loyalty scores. Conversely, Wells Fargo (15) and Local Credit Unions (20) sit at the bottom of the spectrum, facing the greatest challenges in turning customers into advocates.



## Q4. Net promoter score (NPS) by brands in the **banking and credit unions** industry

### NPS Quarterly Comparison

In Q4, the banking industry experienced a "flight to safety," where USAA (56) solidified its position as the unshakeable leader. While the rest of the market crumbled, USAA actually improved its score, rising from 53 in Q3 to 56 in Q4. This resilience suggests that during a quarter likely defined by financial stress, USAA's member-focused model (low fees, high empathy) acted as a buffer against the industry-wide downturn.

Banking and credit unions	Q1	Q2	Q3	Q4
USAA	53	73	53	56
Capital One	53	23	52	49
Chase Bank	43	30	60	38
U.S. Bank	46	61	46	36
Bank of America	46	33	57	27
Citibank	21	33	48	22
Local Credit Unions	68	33	49	20
Wells Fargo	30	6	46	15

### Insights

The middle and big banks saw their Q3 momentum collapse in Q4. Chase (38), Bank of America (27), and U.S. Bank (36) all suffered sharp double-digit drops, surrendering the massive gains they made in the previous quarter.

The data implies that the Q3 spikes (where Chase hit 60 and BoA hit 57) were likely temporary "sugar highs" driven by promotional rate offers or seasonal optimism that evaporated once year end financial realities set in. By Q4, the friction of fees, lower deposit rates, and customer service fatigue likely drove these scores back down to their Q1 baselines.

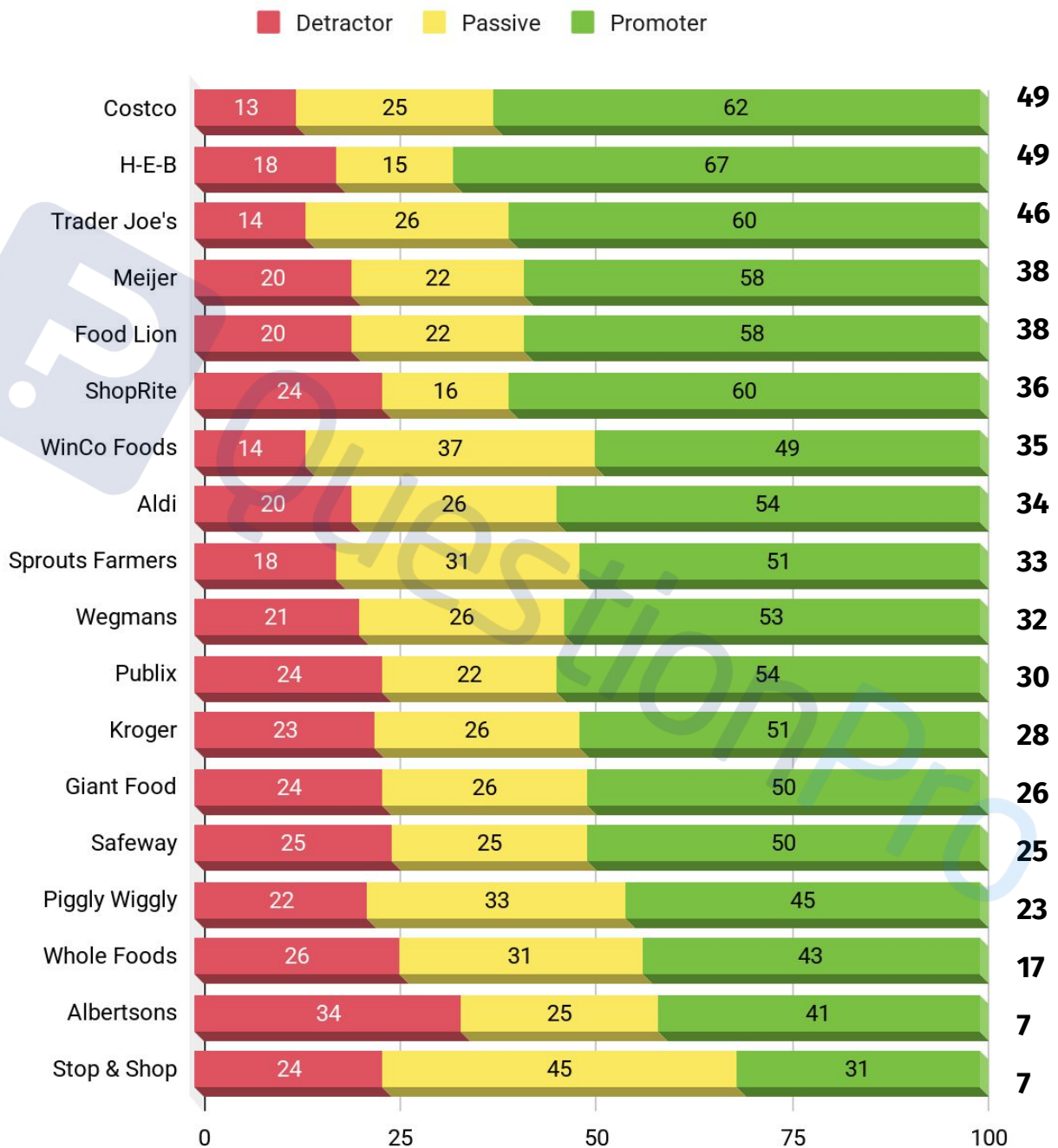
The most shocking development was the freefall of Local Credit Unions, which plummeted from a dominant Q1 start of 68 to a dismal 20 by year end. This massive 48-point annualized drop signals a crisis of confidence. Industry analysis suggests that while credit unions traditionally win on trust, they likely failed to keep up with the digital demands of younger members or began introducing new fees in Q4 that were punished severely by their member base. This collapse allowed even struggling giants like Citibank (22) to finish the year on par with the credit union sector.



# Q4 2025

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

Costco and H-E-B share the crown for customer loyalty, both boasting an excellent NPS of 49. At the opposite end of the spectrum, Albertsons and Stop & Shop face a steep uphill battle, tied for last place with a meager score of 7.



## Q4. Net promoter score (NPS) by brands in the grocery retail industry

### NPS Quarterly Comparison

In Q4, the grocery sector experienced a sharp "holiday hangover" that brought satisfaction scores down across the board. Costco and H-E-B finished the year tied for the top spot with an NPS of 49. Costco shed 20 points from its Q3 peak of 69, while H-E-B completed a year-long slide from its dominant Q1 start of 63. This convergence at the top suggests that by year end, even the industry's titans struggled to maintain superior service levels amidst the holiday rush, staffing challenges, and inventory pressures.

Grocery retail	Q1	Q2	Q3	Q4
Costco	49	48	69	49
H-E-B	63	57	65	49
Trader Joe's	41	22	58	46
Meijer	50	37	49	38
Food Lion	31	26	45	38
ShopRite	38	25	62	36
WinCo Foods	40	34	41	35
Aldi	39	41	48	34
Sprouts Farmers Market	31	34	45	33

### Insights

The "middle market" grocers saw extreme volatility, with ShopRite serving as the most dramatic example. After skyrocketing to a massive 62 in Q3 (likely due to successful summer promotions or seasonal inventory), the brand crashed back to 36 in Q4. Similarly, Trader Joe's dropped from 58 to 46, and Meijer fell from 49 to 38. This pattern indicates that the goodwill generated in Q3 was temporary.

As reported in industry trends, late 2025 shoppers became increasingly "value-driven," punishing brands for any perceived lack of stock or price competitiveness during the critical holiday food shopping season.

These contrasts highlight that 2025 was a year of two distinct halves for grocery retail. The first half and summer (Q1-Q3) saw high highs driven by brand affinity and successful merchandising. However, the universal Q4 decline confirms that customer patience evaporated at the end of the year. The data suggests that operational friction (crowds, out-of-stocks) combined with inflation fatigue to drag the entire industry's satisfaction down to its lowest collective point of the year.

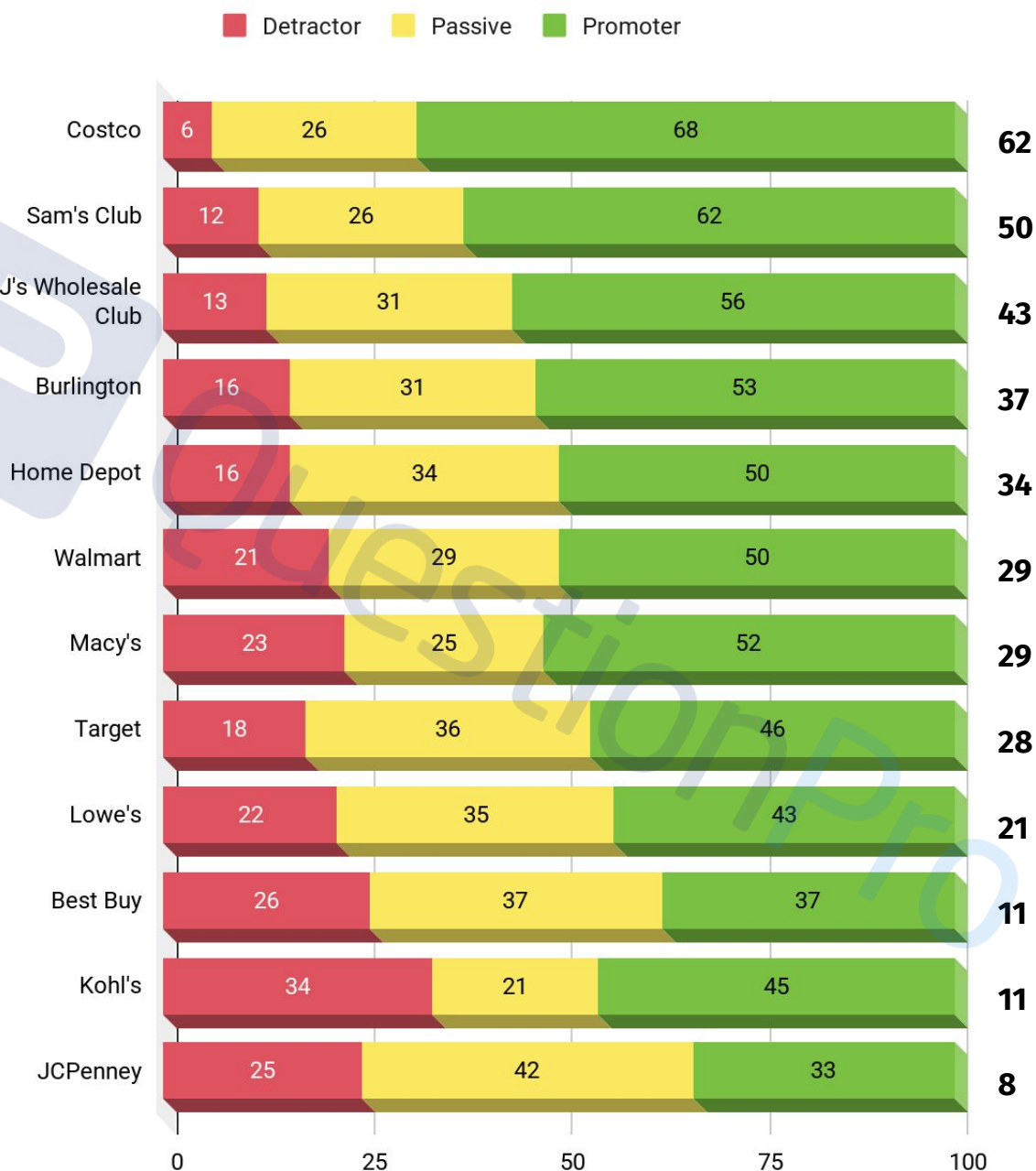
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# Q4 2025

## 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.

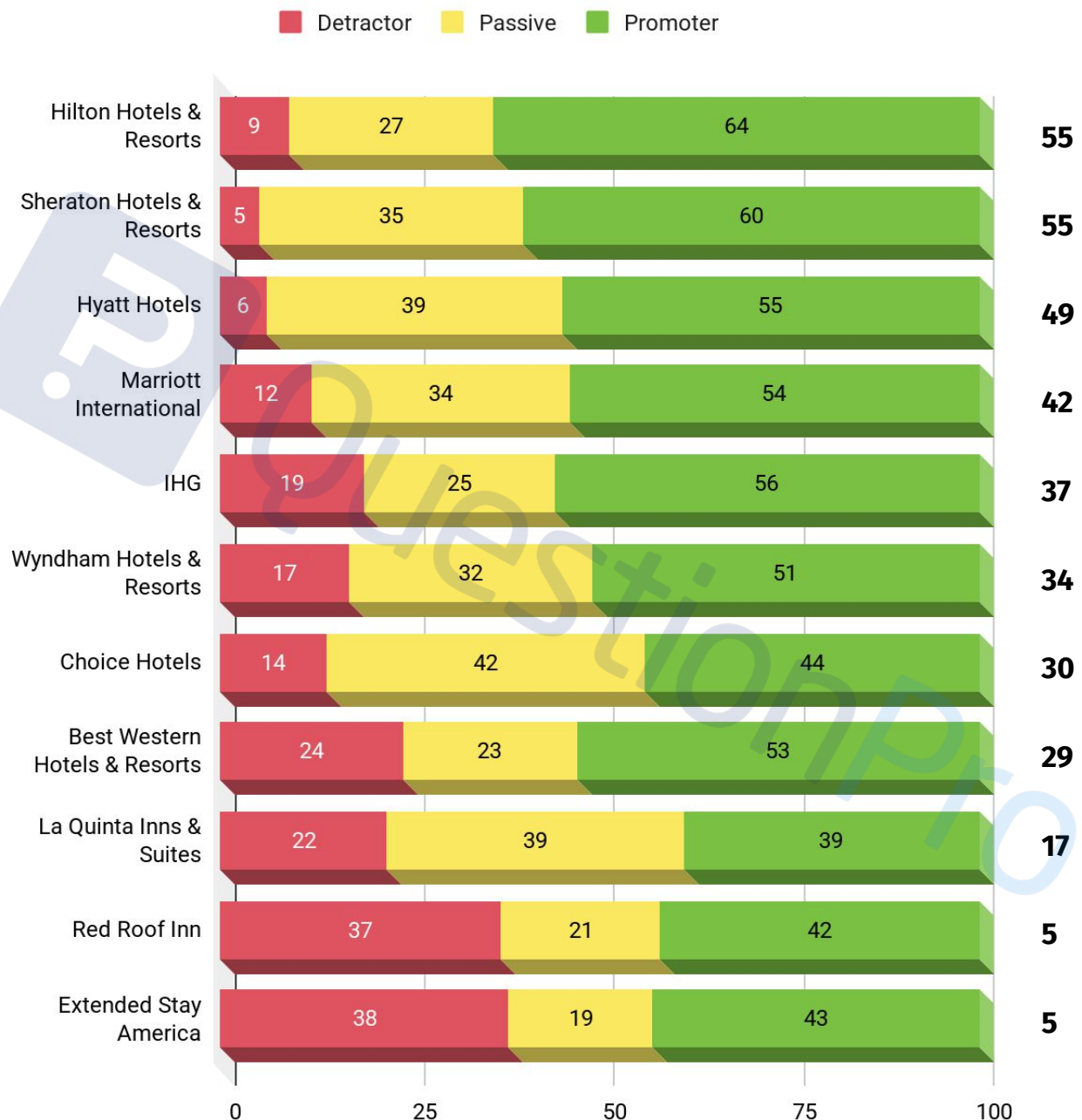
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# Q4 2025

## Net promoter score (NPS) by brands in the **hotel and hospitality** industry

Hilton Hotels & Resorts and Sheraton Hotels & Resorts stand out as the industry leaders, tying for the top spot with an NPS of 55. At the other end of the scale, Red Roof Inn and Extended Stay America struggle to gain traction, both landing at the bottom with a score of 5.



## Q4. Net promoter score (NPS) by brands in the **hotel and hospitality** industry

### NPS Quarterly Comparison

In Q4, the hospitality sector experienced a notable "winter cooling" effect that chilled the red-hot sentiment seen in Q3. While Hilton Hotels & Resorts (55) remained the steady anchor of the industry, other premium brands felt the sting of the seasonal downturn more acutely.

Hotel and Hospitality	Q1	Q2	Q3	Q4
Hilton Hotels & Resorts	56	49	58	55
Hyatt Hotels	58	54	67	49
Marriott International	51	46	62	42
Wyndham Hotels & Resorts	48	55	52	34
Choice Hotels	38	37	48	30
Best Western Hotels & Resorts	42	30	45	29
La Quinta Inns & Suites	6	13	53	17

### Insights

The Hyatt Hotels fell from a commanding Q3 high of 67 down to 49, and Marriott International dropped 20 points from 62 to 42, ending the year significantly lower than where it started in Q1. This suggests that while top-tier travelers remained loyal to Hilton's consistent service model, the broader premium market became highly sensitive to year-end pricing or availability constraints.

The mid-range and value segments displayed extreme volatility, with La Quinta Inns & Suites serving as the prime example of this instability. After a miraculous surge to 53 in Q3, the brand crashed back down to 17 in Q4, erasing nearly all its gains. Similarly, Wyndham Hotels & Resorts surrendered its mid-year progress, falling from 52 to 34, and Best Western dropped to a yearly low of 29.

These contrasts suggest that the massive NPS spikes seen in Q3 were largely driven by the "halo effect" of the summer travel boom rather than permanent operational improvements. Once the leisure season ended and business travel or holiday stress took over in Q4, guest patience wore thin. The data indicates that consistency was the ultimate differentiator in 2025; while brands like La Quinta could buy temporary love with summer pricing, only Hilton proved capable of maintaining high-level satisfaction when the easy seasonal wins evaporated.

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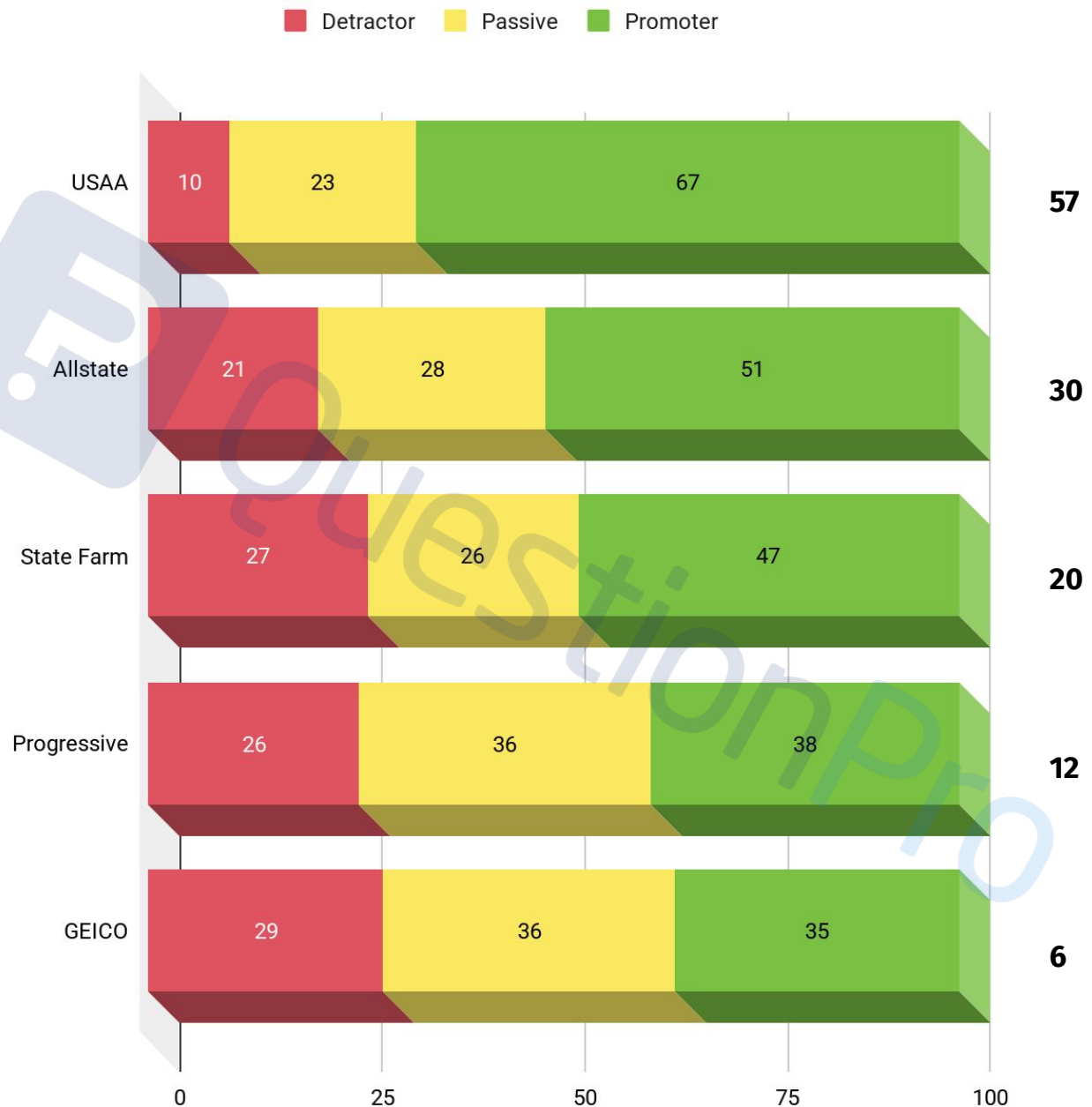
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# Q4 2025

## Net promoter score (NPS) by brands in the **insurance** industry

USAA stands in a league of its own with a commanding NPS of 57, demonstrating exceptional member loyalty that far outpaces the competition. Meanwhile, GEICO trails significantly at 6, and Progressive (12) also struggles to break away from the bottom tier, indicating a difficult environment for retaining customer advocacy.



## Q4. Net promoter score (NPS) by brands in the **insurance** industry

### NPS Quarterly Comparison

In Q4, the industry leader USAA (57) proved it was not immune to the sector-wide downturn, dropping 13 points from its Q3 peak of 70. While USAA maintained a massive lead over competitors, this double-digit decline suggests that even the most loyal member base felt the pressure of year-end premium adjustments or claims friction.

Insurance	Q1	Q2	Q3	Q4
USAA	54	63	70	57
Allstate	13	19	52	30
State Farm	28	20	61	20
Progressive	15	15	35	12
GEICO	20	12	44	6

### Insights

The Insurance providers experienced severe volatility, with Q4 effectively wiping out the gains seen in Q3. State Farm saw the most precipitous drop, plummeting from a yearly high of 61 in Q3 back down to 20 in Q4, erasing all mid-year progress. Similarly, GEICO collapsed from a respectable 44 in Q3 to a shocking single-digit score of 6 in Q4, and Allstate surrendered nearly half its value, falling from 52 to 30. This pattern indicates that the Q3 spikes were likely driven by temporary factors, such as aggressive summer advertising or short-term rate freezes, which evaporated the moment renewal rates hiked or winter claims volumes increased.

These contrasts suggest that customer satisfaction in the insurance sector became highly elastic in late 2025. The speed at which scores reverted to (or below) Q1 levels implies that policyholders are incredibly price-sensitive. The goodwill generated in Q3 was fragile, and as soon as the financial reality of Q4 renewals set in, customers punished insurers for perceived value gaps, leaving only USAA with a defensible promoter base heading into the new year.

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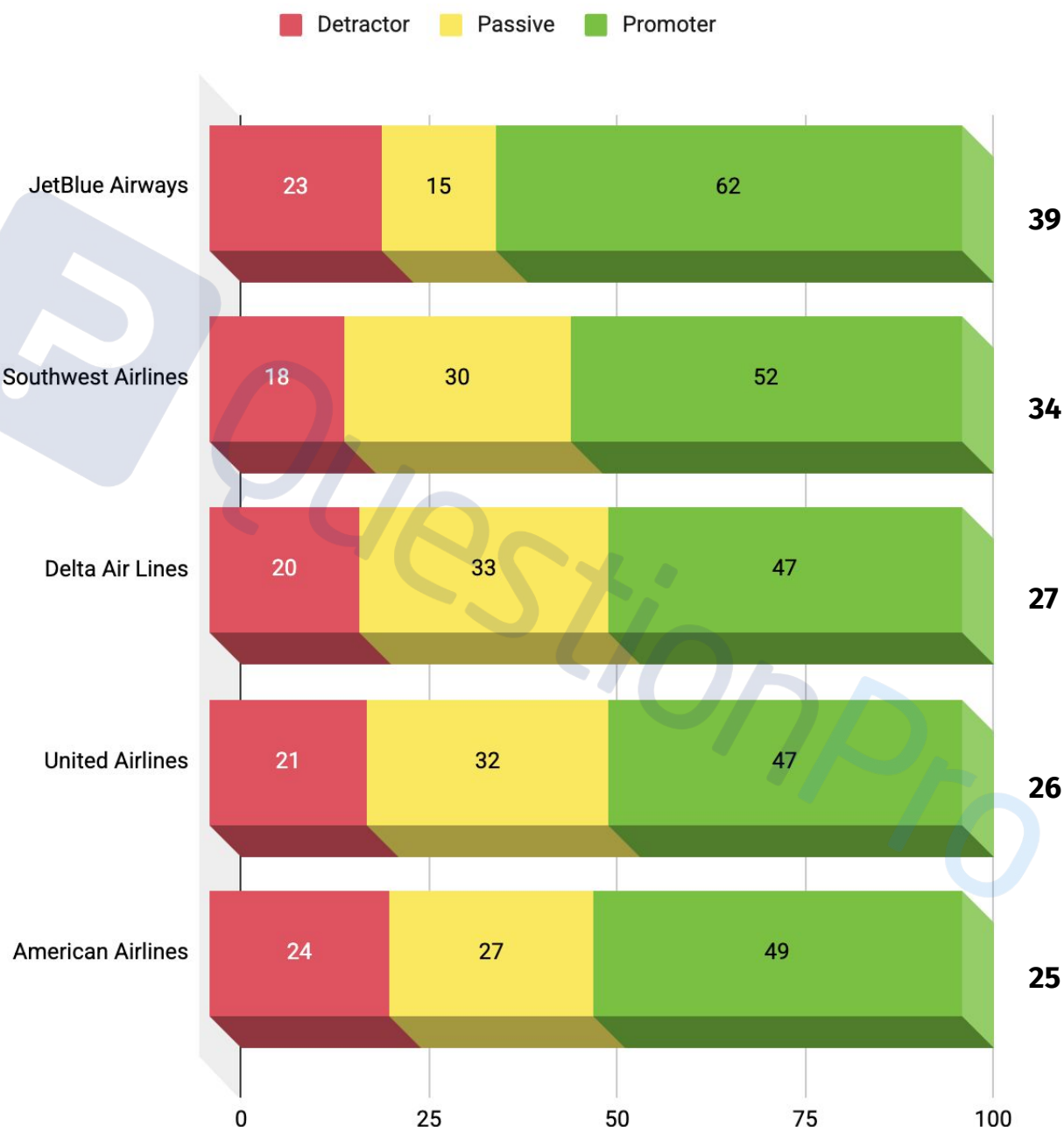
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# Q4 2025

## Net promoter score (NPS) by brands in the **airline** industry

JetBlue Airways takes the top spot with an NPS of 39, followed closely by Southwest Airlines at 34, both demonstrating superior customer loyalty compared to the rest of the field. Meanwhile, the "Big Three"—Delta (27), United (26), and American (25)—are virtually indistinguishable in their performance, all hovering in the mid-20s range.



## Q4. Net promoter score (NPS) by brands in the **airline** industry

### NPS Quarterly Comparison

In Q4, the top-rated carriers JetBlue Airways (39) and Southwest Airlines (34) faced significant turbulence, surrendering the momentum they had built or maintained through Q3. JetBlue, after peaking at 52 in Q3, saw a sharp 13-point drop, while Southwest continued a steady year-long decline to finish at its lowest point.

Airlines	Q1	Q2	Q3	Q4
JetBlue Airways	50	43	52	39
Southwest Airlines	48	45	43	34
Delta Air Lines	43	52	61	27
United Airlines	25	40	45	26
American Airlines	30	33	50	25

### Insights

The Q4 travel environment likely marred by holiday operational meltdowns, rising ticket prices, or weather disruptions overwhelmed their usual customer-first goodwill. The legacy "Big Three" carriers Delta (27), United (26), and American (25) experienced a dramatic market correction, effectively erasing massive mid-year gains.

Delta suffered the most staggering collapse, plummeting from an industry-leading high of 61 in Q3 down to just 27 in Q4. Similarly, American Airlines dropped by half (50 to 25) and United fell back to near its Q1 baseline (45 to 26). This synchronized crash indicates a systemic failure in Q4 operations across the major networks, likely driven by widespread cancellations or staffing shortages that turned a summer of recovery (Q3) into a winter of discontent.

These contrasts suggest that airline loyalty in 2025 was incredibly fragile and performance-dependent. The massive Q3 spikes for legacy carriers prove that passengers will reward reliability and service improvements instantly. However, the equally massive Q4 drops confirm that this trust is not sticky, as one bad holiday season reset the entire industry's reputation back to or below Q1 levels, underscoring that for airlines, you are only as good as your last flight.

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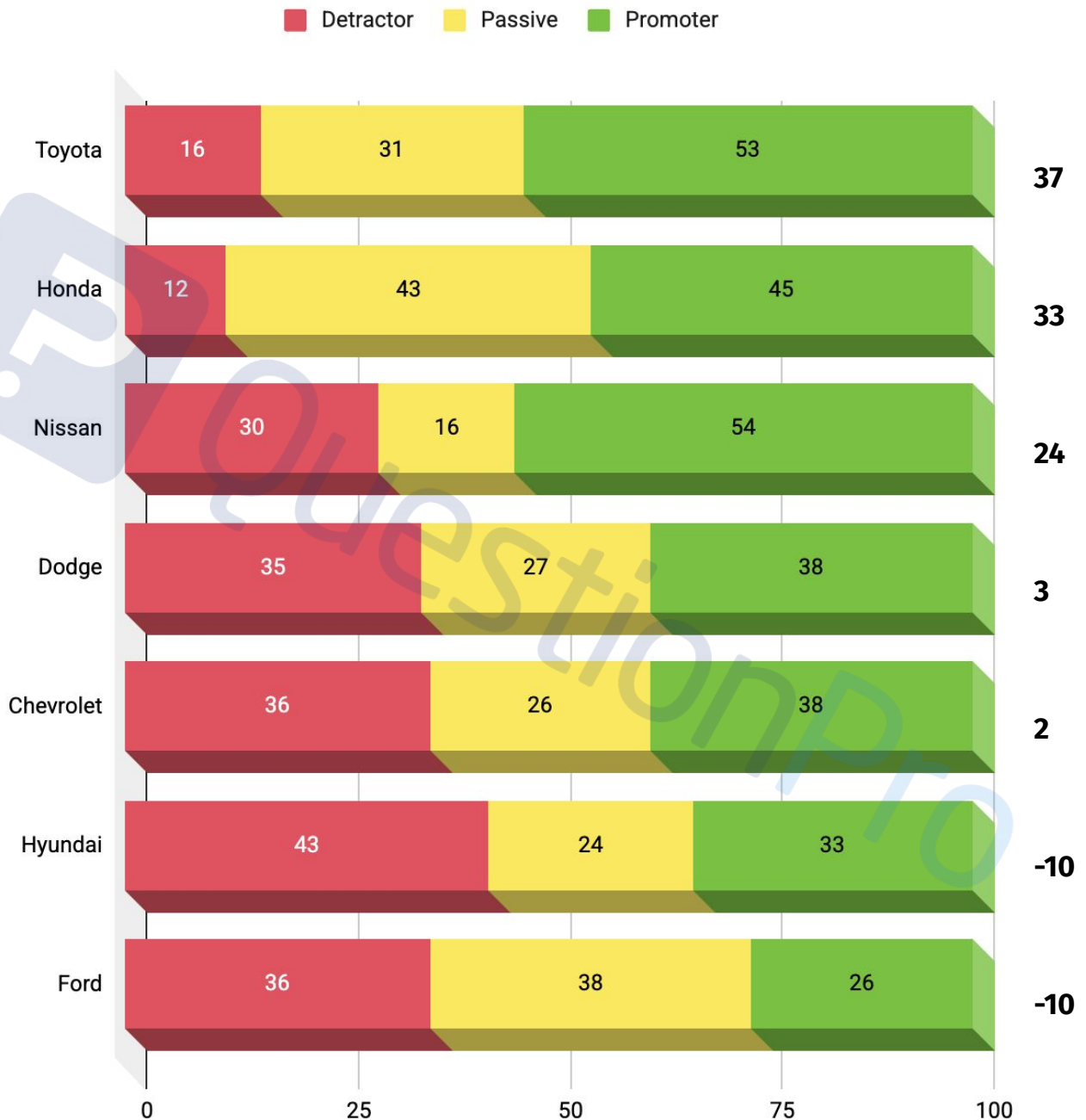
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# Q4 2025

## 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.

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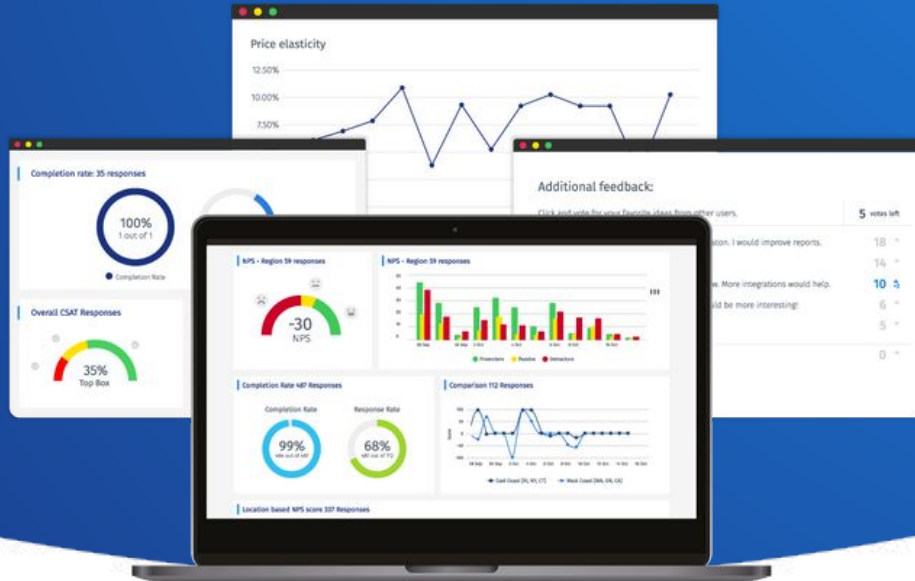
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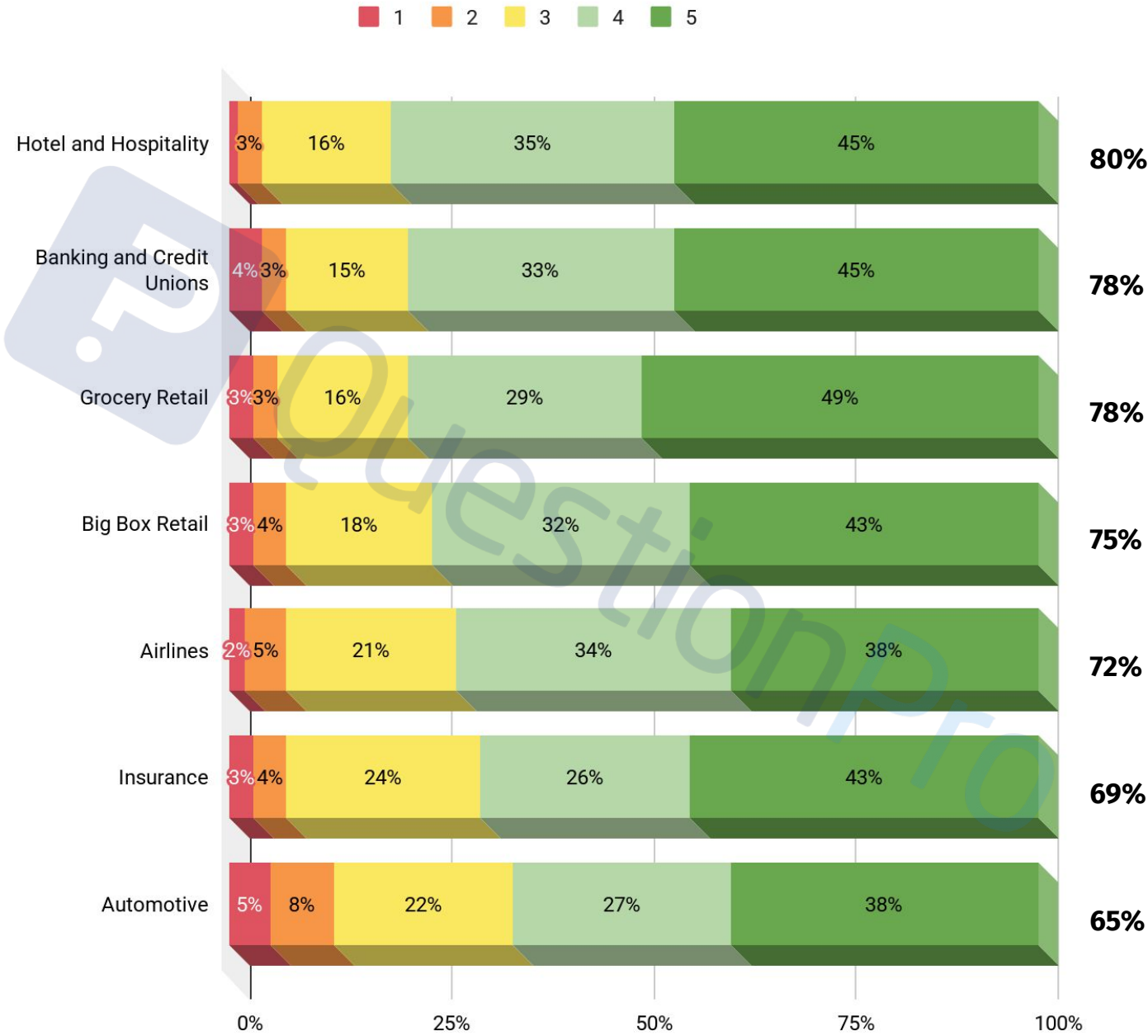


# Customer satisfaction score (CSAT)

# 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.

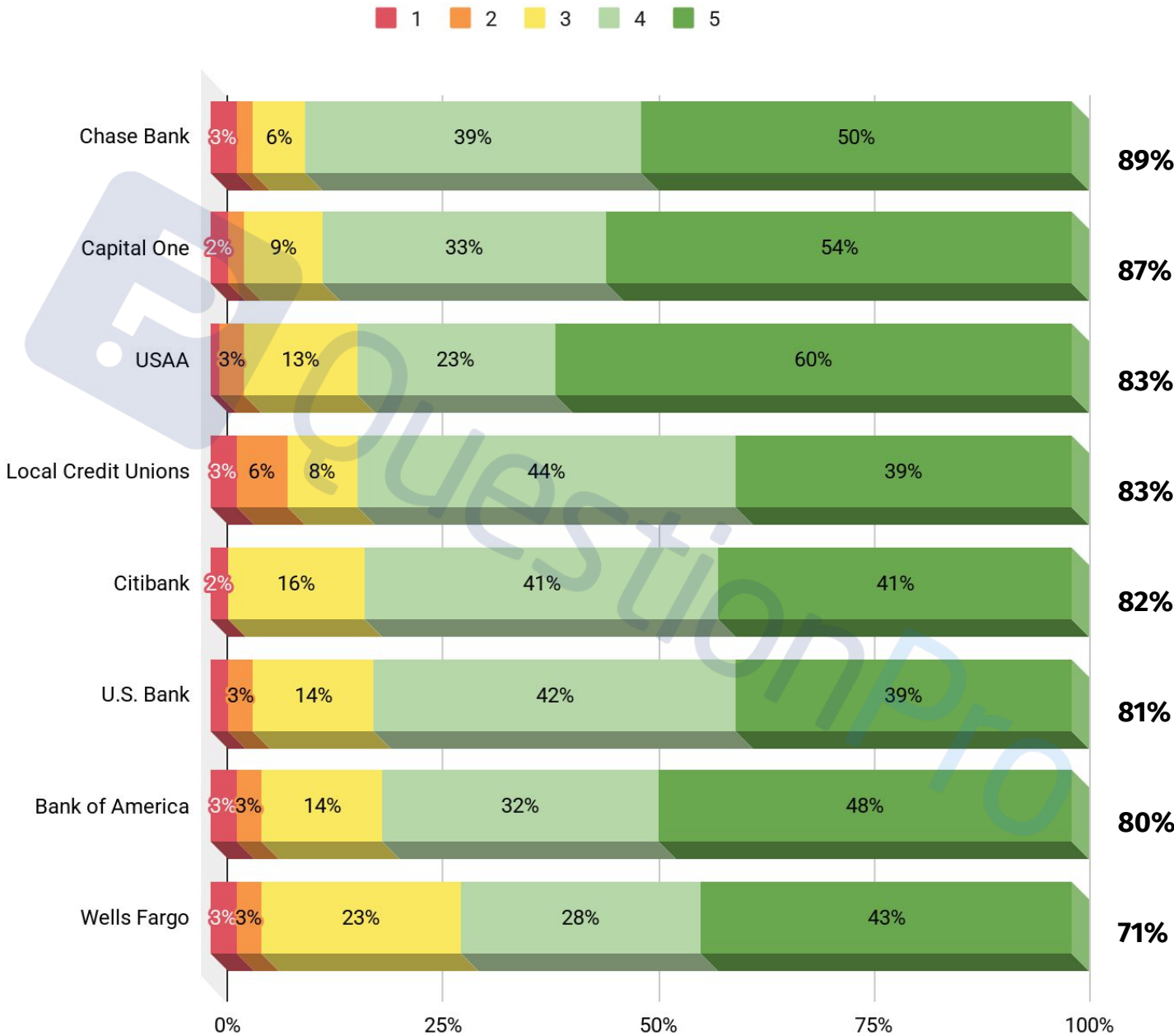
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 Scale: From "1 = very dissatisfied" to "5 = very satisfied"  
 CSAT Score = (% of responses rated 4 or 5) × 100



# Q4 2025

## Customer satisfaction score (CSAT) in the banking and credit unions industry

Chase Bank achieves the highest customer satisfaction with an 89% rating, followed closely by Capital One at 87%. While most institutions, including USAA and Local Credit Unions (both 83%), maintained scores above 80%, Wells Fargo received the lowest rating in the group at 71%.



## Q4. Customer satisfaction score (CSAT) by brands in the banking and credit unions industry

### CSAT Quarterly Comparison

The Banking and Credit Unions industry showed a stabilizing trend in late 2025, with most institutions maintaining strong satisfaction levels despite minor Q4 adjustments. While Q2 generally represented a dip across the board, the sector recovered well in the second half of the year, ending Q4 with top-tier national banks and credit unions successfully holding onto their gains from Q3.

Banking and credit unions	Q1	Q2	Q3	Q4
Chase Bank	83	75	91	89
Capital One	90	74	88	87
Local Credit Unions	84	78	80	83
U.S. Bank	84	92	84	83
USAA	91	96	91	83
Citibank	71	76	80	81
Bank of America	80	73	86	80
Wells Fargo	70	61	82	71

### Insights

In Q4, the sector was defined by resilience rather than volatility. Chase Bank (89 down from 91) and Capital One (87 down from 88) maintained their leadership positions with minimal declines, suggesting that their digital-first investments likely continued to pay off, offering the consistency customers prioritized during the busy holiday season. Citibank defied the slight downward trend seen elsewhere, posting a steady increase to 81 (up from 80), implying that recent service improvements probably resonated well with its customer base.

The most notable fluctuation involved USAA, which dropped to 83 in Q4 from a high of 91 in Q3 (and 96 in Q2). This significant correction suggests that while long-term loyalty remains high, specific end-of-year operational challenges—perhaps related to insurance cross-over issues or digital outages—likely frustrated members. Meanwhile, Wells Fargo (71 down from 82) saw a sharp reversal of its Q3 recovery, indicating that trust issues or service inconsistencies probably resurfaced to drag sentiment back down to Q1 levels.

Overall, the data indicates that while national heavyweights like Chase and Capital One offered a "safe harbor" of reliability, brands with more volatile service delivery, like Wells Fargo, struggled to maintain momentum.

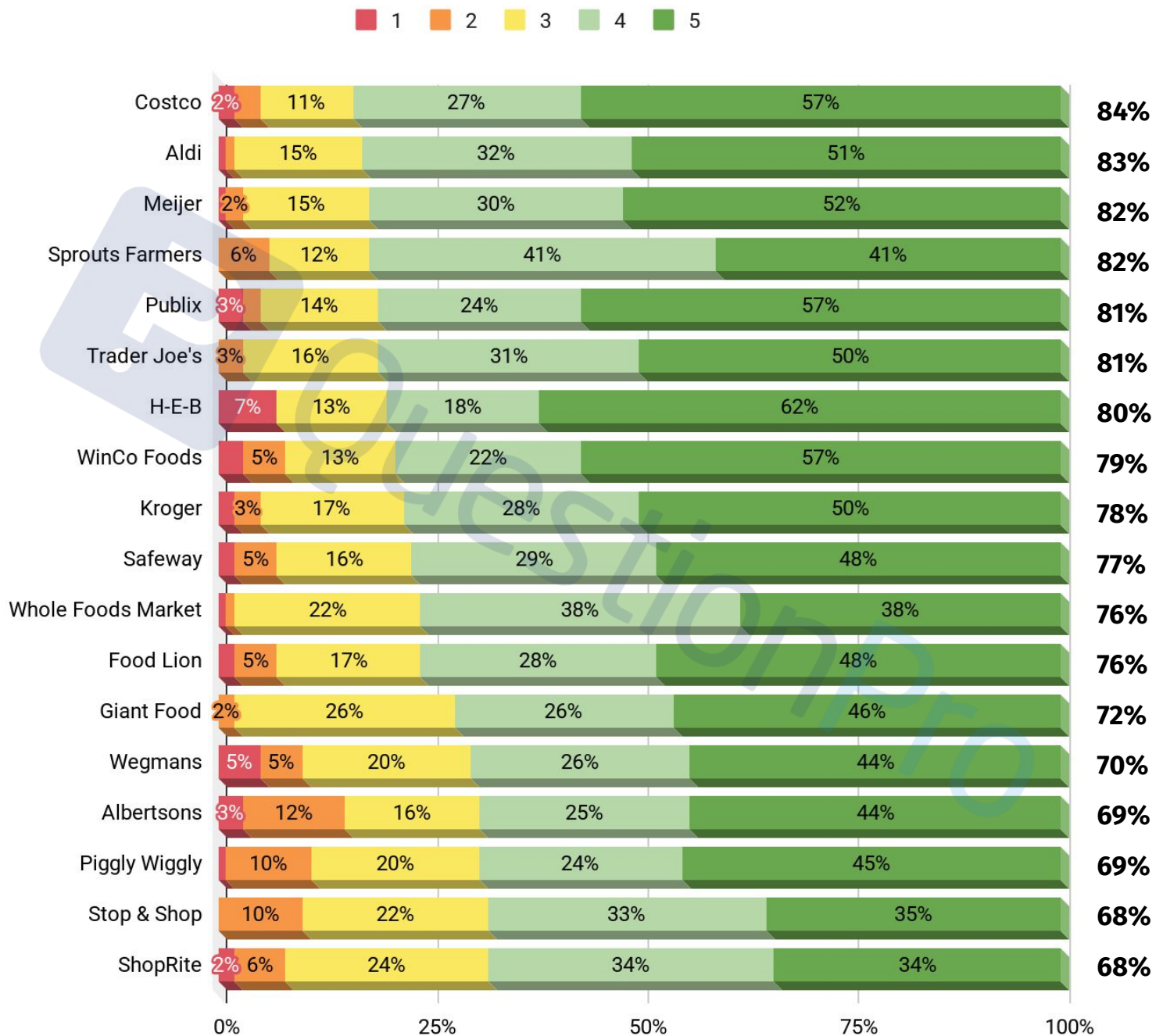
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# Q4 2025

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

Costco leads the industry with an 84% customer satisfaction rating, closely followed by Aldi at 83% and Meijer at 82%. While the majority of brands scored well, ShopRite and Stop & Shop appear at the lower end of this dataset, both receiving a 68% rating.



## Q4. Customer satisfaction score (CSAT) by brands in the grocery retail industry

### CSAT Quarterly Comparison

The grocery retail sector followed a distinct "summer peak, winter dip" pattern in 2025. While the industry achieved its highest satisfaction levels in Q3, driven by abundant fresh inventory and summer seasonal promotions, Q4 saw a broad correction as holiday crowds and pricing pressures likely strained operations.

Overall, the sector maintained a respectable 78% average, with a clear separation between value-focused leaders and traditional regional chains struggling with consistency.

Grocery retail	Q1	Q2	Q3	Q4
Costco	82	85	91	84
Aldi	78	83	84	83
Meijer	82	77	77	82
Sprouts Farmers Market	86	78	77	82
Publix	85	85	84	81
Trader Joe's	84	81	90	81
H-E-B	81	89	91	80
WinCo Foods	85	78	78	79
Kroger	74	77	86	78
Safeway	70	74	80	77

### Insights

In Q4, Meijer and Sprouts Farmers Market posted the strongest rebounds (both 82 up from 77). This gains suggest these brands likely managed holiday logistics effectively, avoiding the friction seen elsewhere. Conversely, H-E-B (80 down from 91) and Trader Joe's (81 down from 90) experienced severe corrections. This volatility implies that the high-touch, compact store models of these cult favorites probably struggled to scale during the chaotic holiday rush, leading to congestion that frustrated shoppers.

The top-rated retailer, Costco (84), retained the lead despite a sharp drop from its Q3 peak (91). This decline suggests that while members prioritized bulk value, the stress of navigating overcrowded warehouses in Q4 likely dampened enthusiasm.

Meanwhile, Aldi (83) remained remarkably stable (down just 1 point), indicating that inflation-weary customers probably rewarded consistent, no-frills value over the premium experience of competitors.

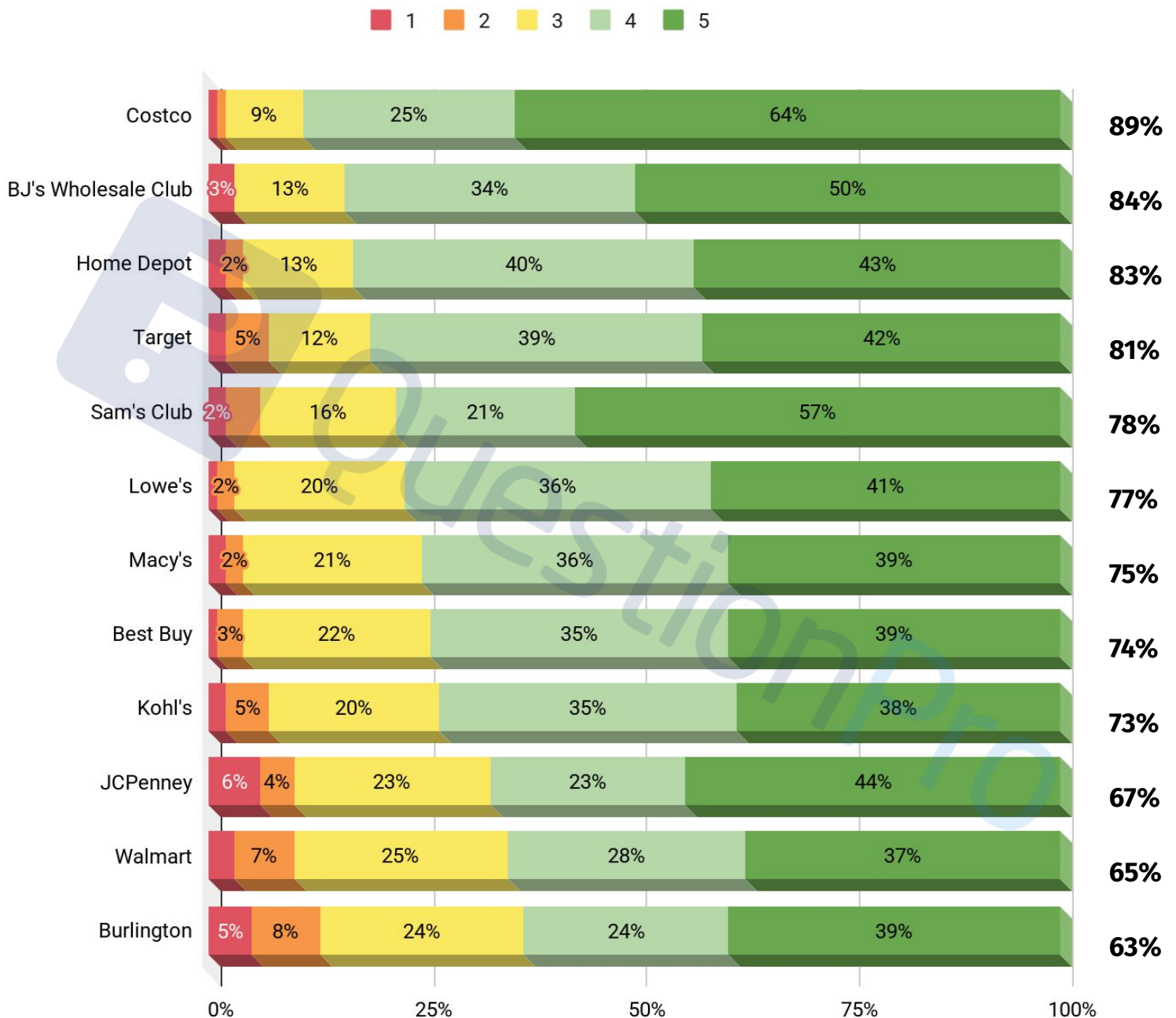
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 Scale: From "1 = very dissatisfied" to "5 = very satisfied"  
 CSAT Score = (% of responses rated 4 or 5) × 100



# 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.

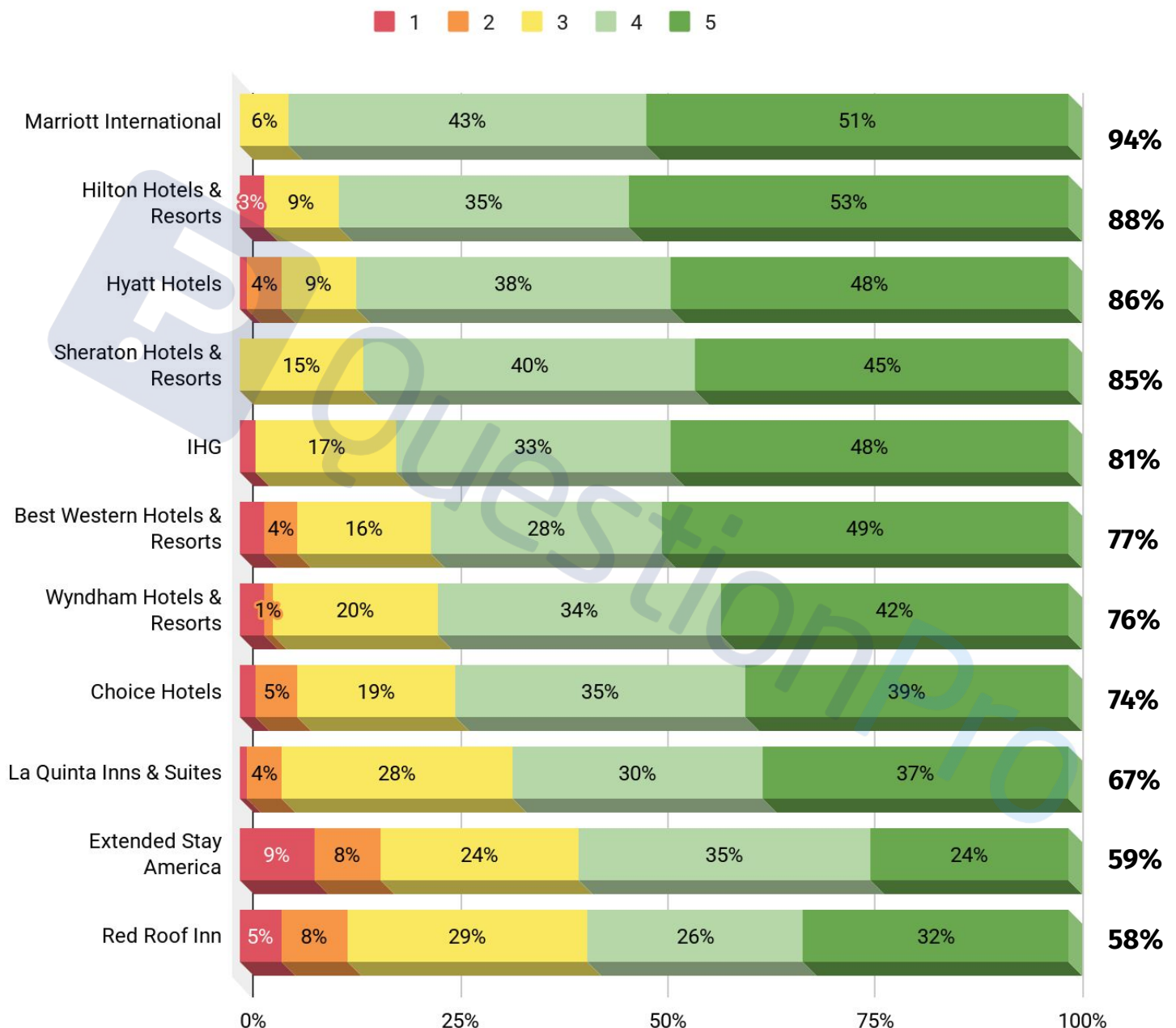
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# Q4 2025

## Customer satisfaction score (CSAT) by brands in the **hotel and hospitality** industry

Marriott International sets the industry standard with an exceptional 94% customer satisfaction rating, leading other premium brands like Hilton (88%) and Hyatt (86%). In contrast, economy lodging options trail significantly, with Extended Stay America (59%) and Red Roof Inn (58%) receiving the lowest scores in the group.



## Q4. Customer satisfaction score (CSAT) by brands in the hotel and hospitality industry

### CSAT Quarterly Comparison

The hotel and hospitality industry displayed a divergence in late 2025, where premium brands achieved record highs while midscale and economy operators faced severe corrections. While the sector enjoyed a "summer peak" in Q3 with elevated satisfaction driven by leisure travel, Q4 brought a sharp reversal for value-focused brands, likely due to "price normalization" and staffing pressures that eroded the guest experience at lower price points.

Hotel and Hospitality	Q1	Q2	Q3	Q4
Marriott International	88	83	89	94
Hilton Hotels & Resorts	86	82	89	88
Hyatt Hotels	93	80	91	86
Best Western Hotels & Resorts	79	75	83	77
Wyndham Hotels & Resorts	82	80	85	76
Choice Hotels	74	76	81	74
La Quinta Inns & Suites	65	68	89	67

### Insights

In Q4, the most dramatic volatility was seen in the midscale and economy segments, where La Quinta Inns & Suites plummeted to 67 (down from a surprising Q3 peak of 89) and Wyndham Hotels & Resorts dropped to 76 (from 85). This massive 22-point correction for La Quinta suggests that its Q3 surge was likely an anomaly driven by summer leisure volume, which probably evaporated in Q4 as price-sensitive travelers became less forgiving of service lapses during the off-peak season. Similarly, Choice Hotels (74) and Best Western (77) posted declines, indicating that the "value-for-money" proposition likely faltered as rising operational costs constrained their ability to maintain service standards.

The top-rated brands—Marriott International (94) and Hilton Hotels & Resorts (88)—defied the broader industry downturn. Marriott's surge to a near-perfect 94 (up from 89) suggests its investment in digital concierge services and loyalty personalization probably insulated it from the labor shortages plaguing competitors. Hilton remained remarkably consistent, holding steady near 88, which implies its "tech-forward" strategy (e.g., digital keys, smart rooms) likely continued to deliver the friction-free experiences that high-yield business travelers prioritize.

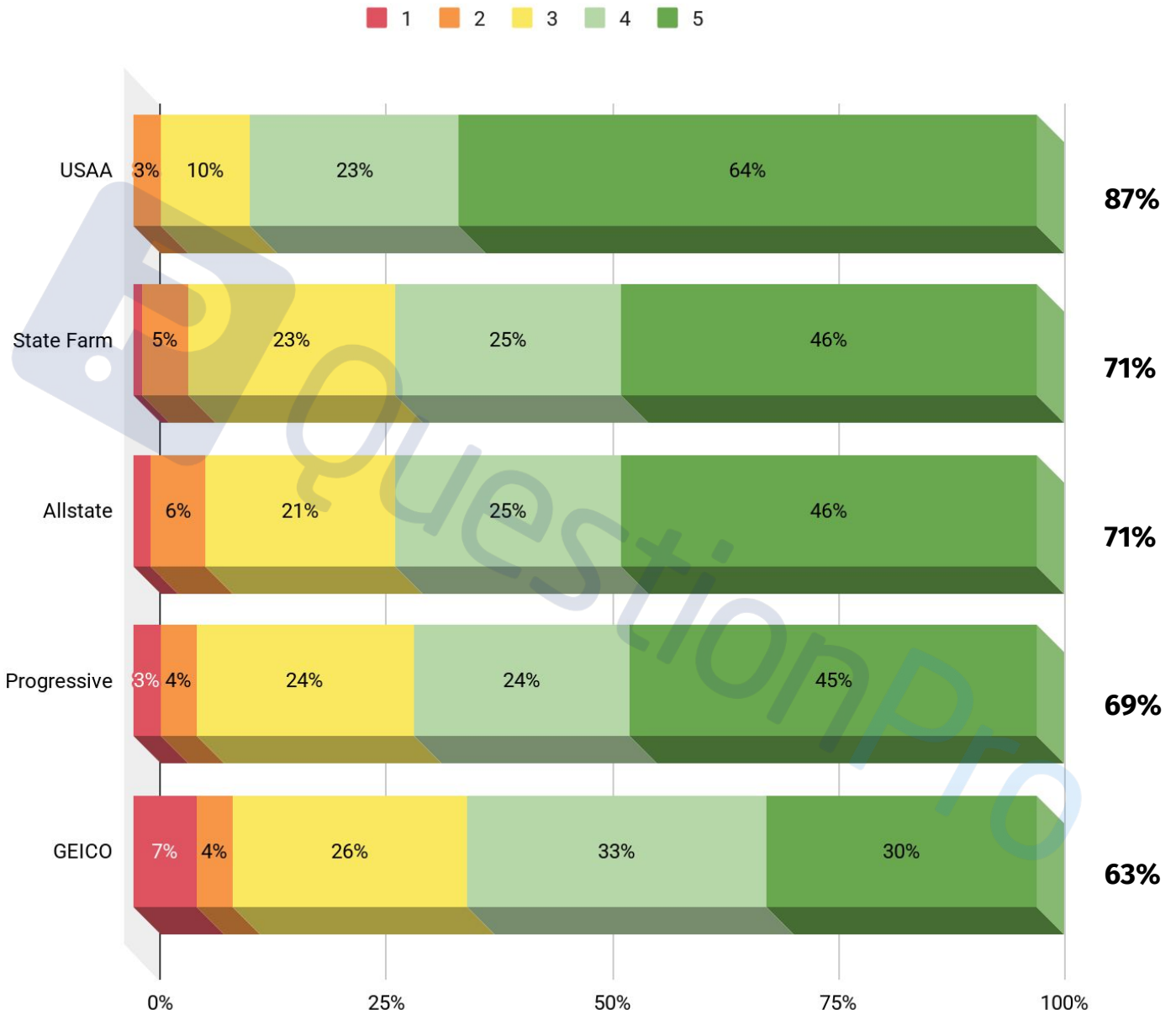
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# Q4 2025

## Customer satisfaction score (CSAT) by brands in the **insurance** industry

USAA dominates the sector with an outstanding 87% customer satisfaction rating, driven by a massive 64% of customers giving it the highest possible score. State Farm and Allstate follow in a tie for second place at 71%, while GEICO trails the group with a 63% rating and the highest visible percentage of negative reviews.



## Q4. Customer satisfaction score (CSAT) by brands in the **insurance** industry

### CSAT Quarterly Comparison

Characterized by a "summer surge" in Q3 followed by a broad Q4 decline, USAA maintained its dominance with high resilience. Major providers like State Farm and GEICO faced sharp year-end corrections, suggesting that external pressures, likely rising premiums or seasonal claim volumes, eroded customer sentiment in the final quarter.

Insurance	Q1	Q2	Q3	Q4
USAA	80	86	90	87
State Farm	76	66	85	71
Allstate	62	66	77	71
Progressive	75	61	78	69
GEICO	73	59	75	63

### Insights

In Q4, the insurance sector saw substantial drops, with State Farm (71 down from 85) and GEICO (63 down from 75) posting the most severe declines after a strong Q3. This "winter dip" implies that while Q3 improvements probably reflected temporary relief or successful mid-year adjustments, Q4 likely brought renewed friction, possibly driven by end-of-year renewal rate hikes or slower winter claims processing that frustrated policyholders.

USAA (87) remained the clear leader, showing the most stability despite a small dip from its Q3 peak of 90. This consistency suggests its member-focused model likely insulated it from the broader market volatility that impacted competitors. Conversely, GEICO's drop to the bottom of the rankings (63) indicates that price-sensitive customers probably reacted negatively to cost increases, penalizing the brand more harshly than its peers when value propositions were tested.

These contrasts suggest that in Q4, customers likely prioritized service consistency and trust over price alone. The data indicates that brands with stronger relationship equity, like USAA, were better able to weather industry headwinds, while those competing primarily on cost faced swifter punishment when economic pressures mounted.

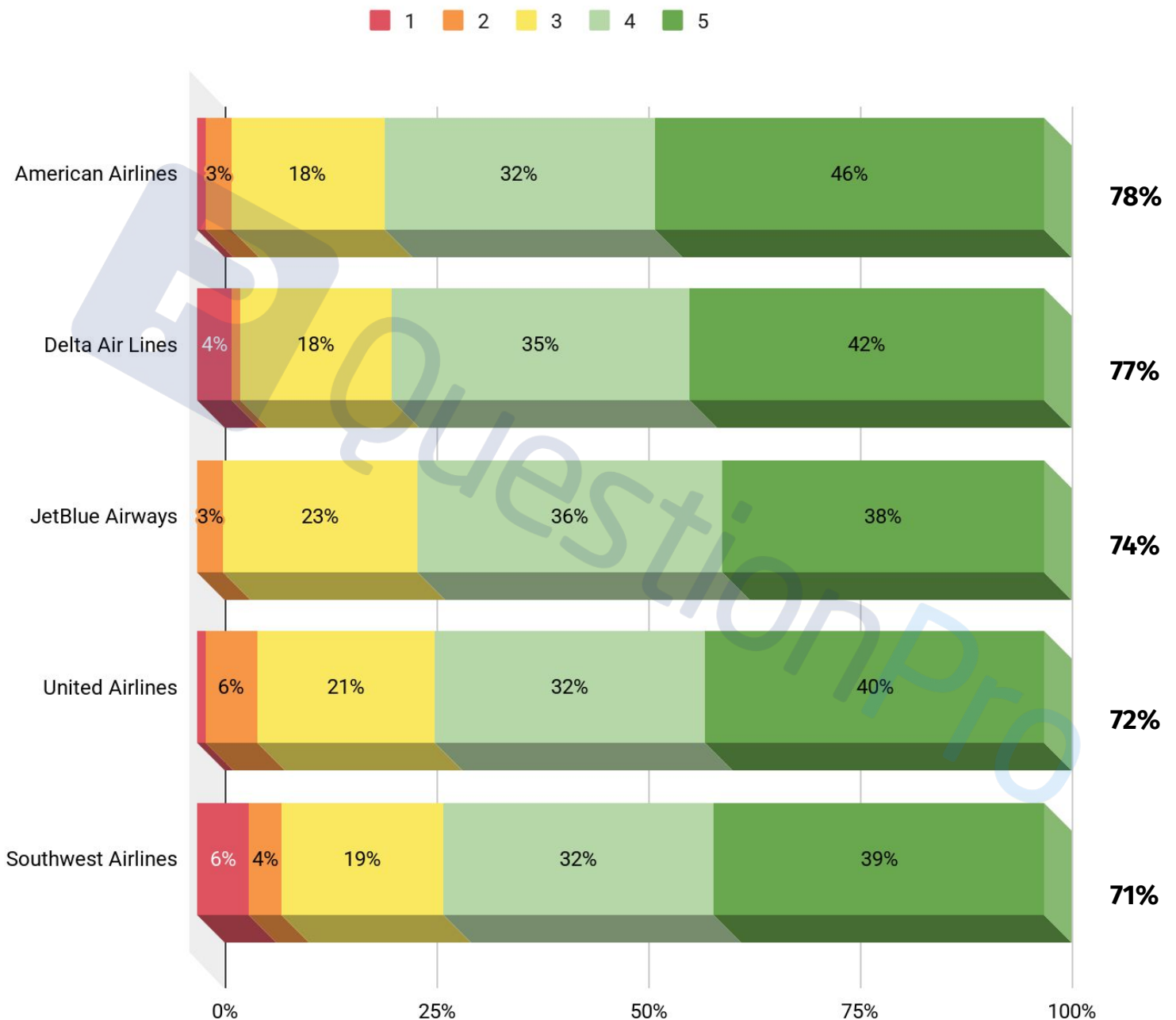
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# Q4 2025

## Customer satisfaction score (CSAT) by brands in the **airline** industry

American Airlines secures the top position with a 78% customer satisfaction rating, narrowly edging out Delta Air Lines at 77%. While the sector remains competitive with all major carriers scoring above 70%, Southwest Airlines ranks lowest at 71%, showing the highest proportion of negative ratings (6% in the lowest category) among the group.



## Q4. Customer satisfaction score (CSAT) by brands in the **airline** industry

### CSAT Quarterly Comparison

The airline industry saw dramatic volatility in 2025, with record-high satisfaction in Q3 (averaging ~87) crashing by 13 points in Q4. This sharp "winter correction" suggests that the operational strains of holiday travel and renewed price sensitivity likely snapped the "revenge travel" patience that had buoyed scores during the summer.

Airlines	Q1	Q2	Q3	Q4
American Airlines	77	73	87	78
Delta Air Lines	82	88	88	77
JetBlue Airways	87	88	92	74
United Airlines	74	79	82	72
Southwest Airlines	88	86	88	71

### Insights

In Q4, the sector experienced broad double-digit declines, with JetBlue Airways (74 down from 92) and Southwest Airlines (71 down from 88) posting the steepest drops. This volatility implies that leisure-focused providers probably struggled most to maintain their service promise under winter operational pressure.

Meanwhile, American Airlines (78) and Delta Air Lines (77) retained the top spots, suggesting that legacy providers' infrastructure likely offered the reliability travelers prioritized over perks during the chaotic end-of-year season.

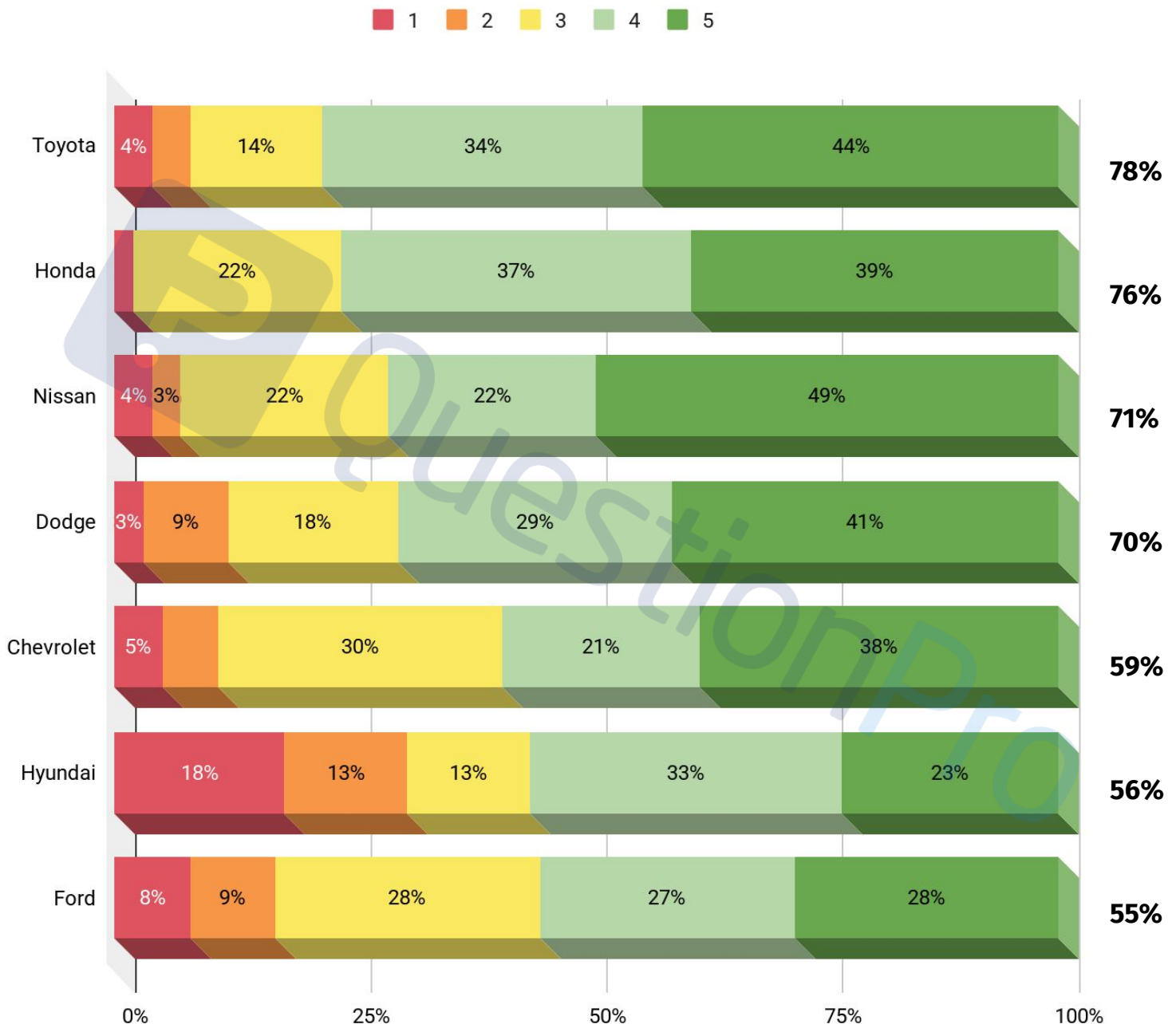
The lowest-rated brands, Southwest (71) and United (72), likely suffered from specific policy or service friction points that alienated loyalists. The data indicates a clear shift where customers probably rewarded predictability in Q4, punishing the inconsistency of value carriers more severely than the higher fares of premium competitors.



# 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.

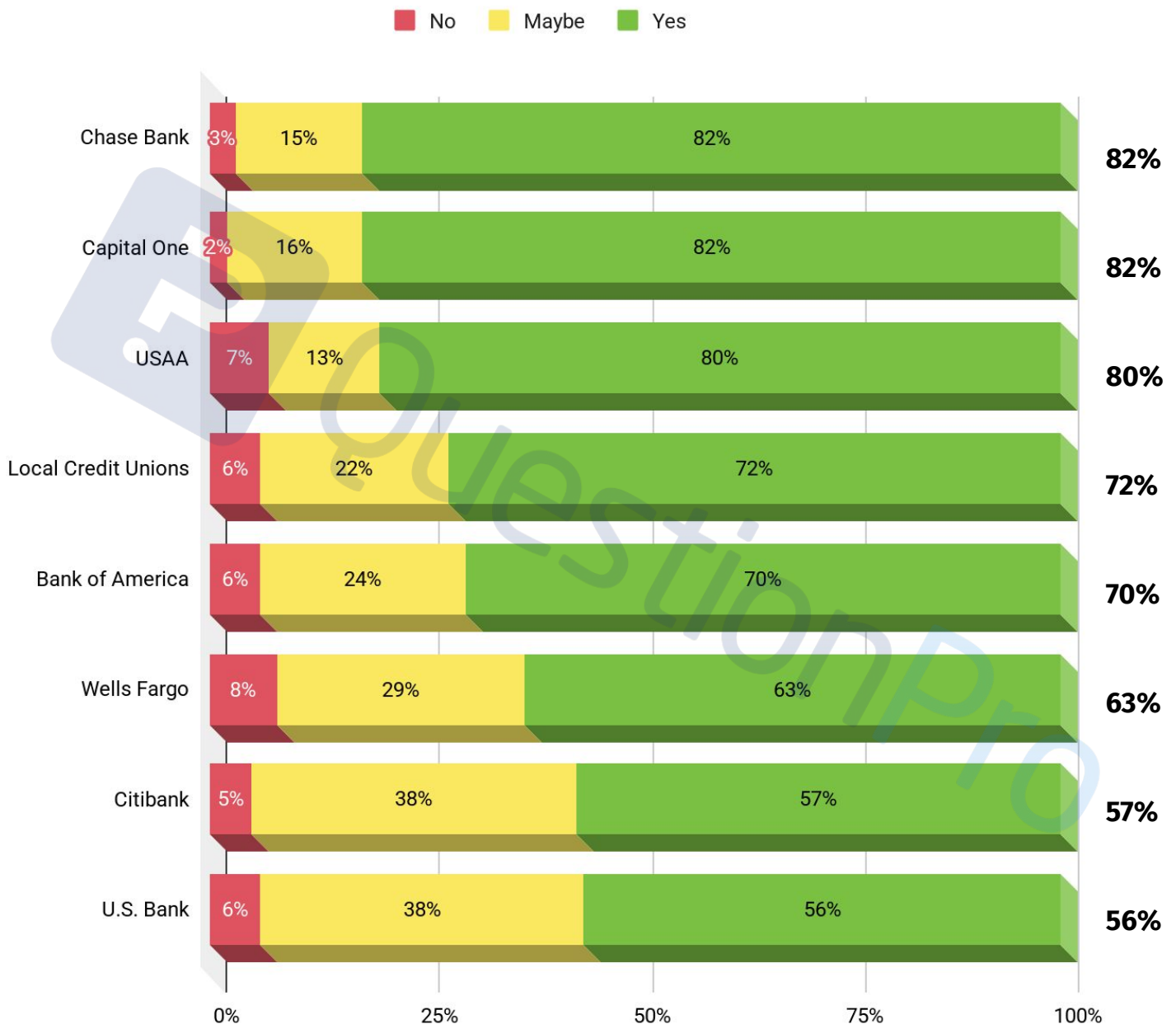


# Future purchase intent

# Q4 2025

## Future purchase intent by brands in the **banking and credit union** industry

Chase Bank and Capital One are the clear leaders in future purchase consideration, both securing an 82% "Yes" response rate, followed closely by USAA at 80%. In contrast, U.S. Bank and Citibank show the lowest definitive intent (56% and 57% respectively), largely due to a much higher portion of undecided "Maybe" customers compared to the top brands.



## Q4. Future purchase intent by brands in the banking and credit union industry

### Purchase Intent Quarterly Comparison

In Q4, the banking sector experienced a significant cooling of Purchase Intent following a Q3 surge; Citibank (57 from 78) and U.S. Bank (56 from 78) posted the steepest drops, while USAA was the only major brand to grow its intent share (80 from 73), and Capital One held steady (82 from 82).

Banking and credit unions	Q1	Q2	Q3	Q4
Chase Bank	86	76	93	82
Capital One	81	74	82	82
USAA	73	73	73	80
Local Credit Unions	82	75	86	72
Bank of America	86	75	85	70
Wells Fargo	72	55	79	63
Citibank	79	67	78	57
U.S. Bank	82	79	78	56

### Insights

The top-rated brands, Chase (82) and Capital One (82), maintained their leadership by appealing to "pragmatic" consumers seeking high-yield value and digital convenience during a period of economic caution. Capital One's stability is notable and aligns with the positive market sentiment surrounding its 2025 strategic expansion (including the Discover acquisition integration), which reinforced its reputation for no-fee banking and strong rewards, key drivers for value-conscious holiday shoppers.

The declining brands, Citibank (57), U.S. Bank (56), and Wells Fargo (63), saw their Q3 gains evaporate as the "shopping window" closed. The sharp Q3-to-Q4 drop (e.g., Citi falling 21 points) suggests that the Q3 spike was likely driven by temporary rate promotions or back-to-school spending needs that faded by year-end. As mentioned in broader financial reports, Q4 consumer behavior shifted toward "hunkering down" and managing existing accounts rather than opening new ones, penalizing traditional institutions that rely on aggressive acquisition offers rather than long-term relational value.

These contrasts suggest that in the final quarter of 2025, banking customers moved from exploration to consolidation, favoring institutions that offered consistent value and digital reliability over those relying on temporary promotional rates.

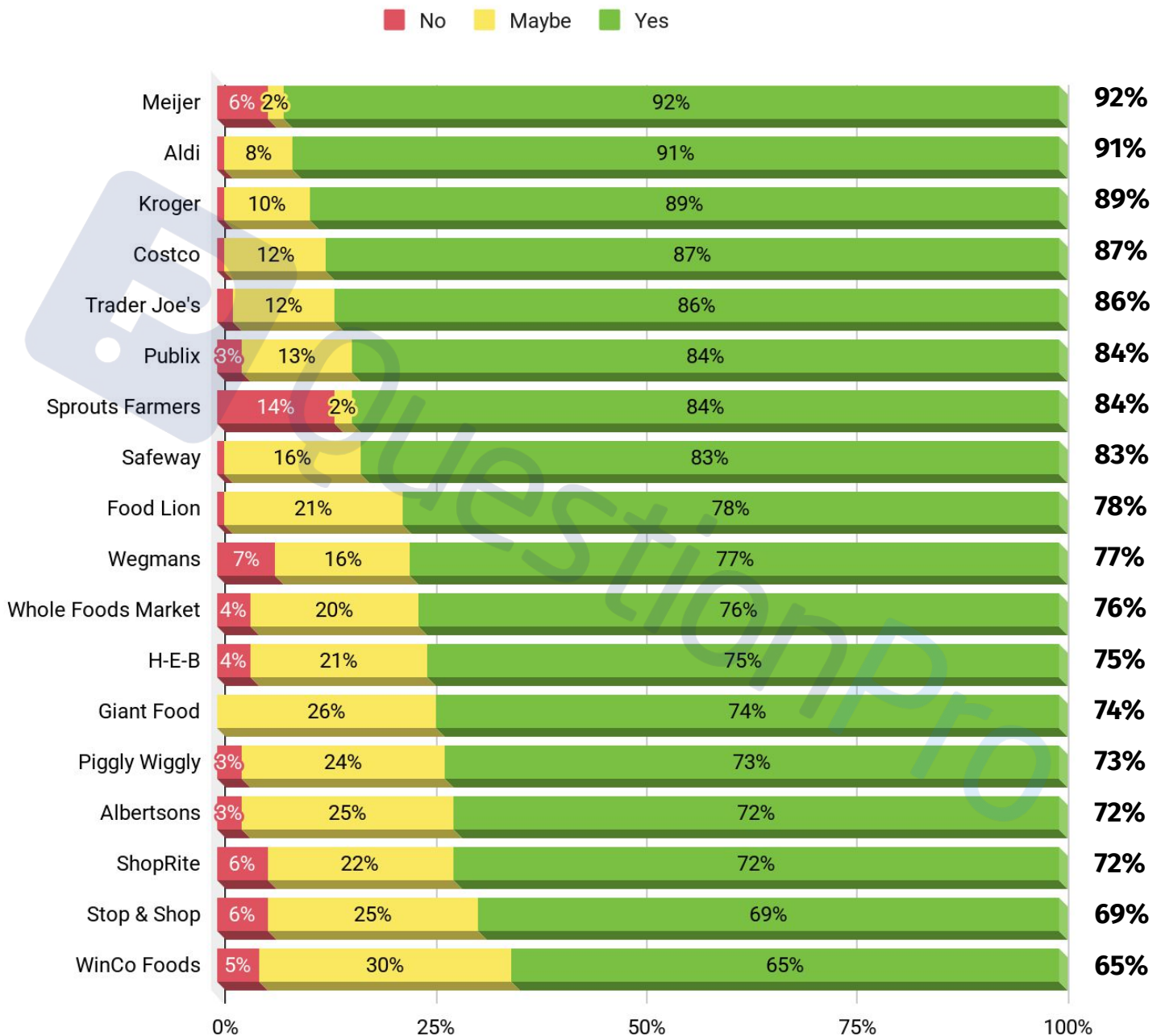
The Future Purchase Intent follow-up metric captures post-purchase loyalty by asking recent buyers, "How likely are you to purchase again from [Brand]?" Responses are reported as:  
 % Likely to Repurchase (Yes): Strong future intent  
 % At Risk (No): Potential churn signal  
 % Undecided (Maybe): Opportunity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



# Q4 2025

## Future purchase intent by brands in the **grocery retail** industry

Meijer and Aldi lead the grocery sector with exceptional future purchase intent, securing 92% and 91% "Yes" responses respectively. Major chains like Kroger, Costco, and Trader Joe's follow closely, all showing strong consideration rates between 86% and 89%. In contrast, WinCo Foods trails the group with the lowest definitive interest at 65%, significantly below the category leaders.



## Q4. Future purchase intent by brands in the **grocery retail** industry

### Purchase Intent Quarterly Comparison

In Q4, shoppers abandoned brand loyalty to traditional grocers in favor of retailers that could guarantee the lowest total basket cost. Meijer (92 from 86) and Aldi (91 from 86) posted the strongest rebounds to take the top spots. Meanwhile, Kroger (89 from 93) and Wegmans (77 from 82) experienced notable declines, while Sprouts Farmers Market continued its steady ascent (84 from 81).

Grocery retail	Q1	Q2	Q3	Q4
Meijer	91	80	86	92
Aldi	87	88	86	91
Kroger	87	89	93	89
Costco	86	86	89	87
Trader Joe's	88	78	86	86
Publix	86	87	86	84
Sprouts Farmers Market	69	81	81	84
Safeway	76	70	80	83
Food Lion	87	79	81	78
Wegmans	74	72	82	77

### Insights

The data reflects a broader "trading down" behavior where shoppers, weary from years of price hikes, consolidated their holiday spending at value-focused retailers that offered definitive savings over traditional supermarkets. Sprouts (84) bucked the trend of mid-market softness by successfully targeting resilient, higher-income health-conscious consumers who continued to prioritize specialty products despite the economic headwinds.

Kroger's 4-point drop coincides with a "mixed" fiscal performance where identical sales growth slowed and the retailer grappled with the operational distractions of its blocked merger with Albertsons. The decline for Wegmans and other regional players like Food Lion (78) suggests that during the high-spend holiday quarter, customers penalized premium or conventional pricing models in favor of the hard discounts found at Aldi or the "one-stop" convenience of supercenters.

These contrasts suggest that in the final quarter of 2025, the primary driver of Purchase Intent was value maximization.

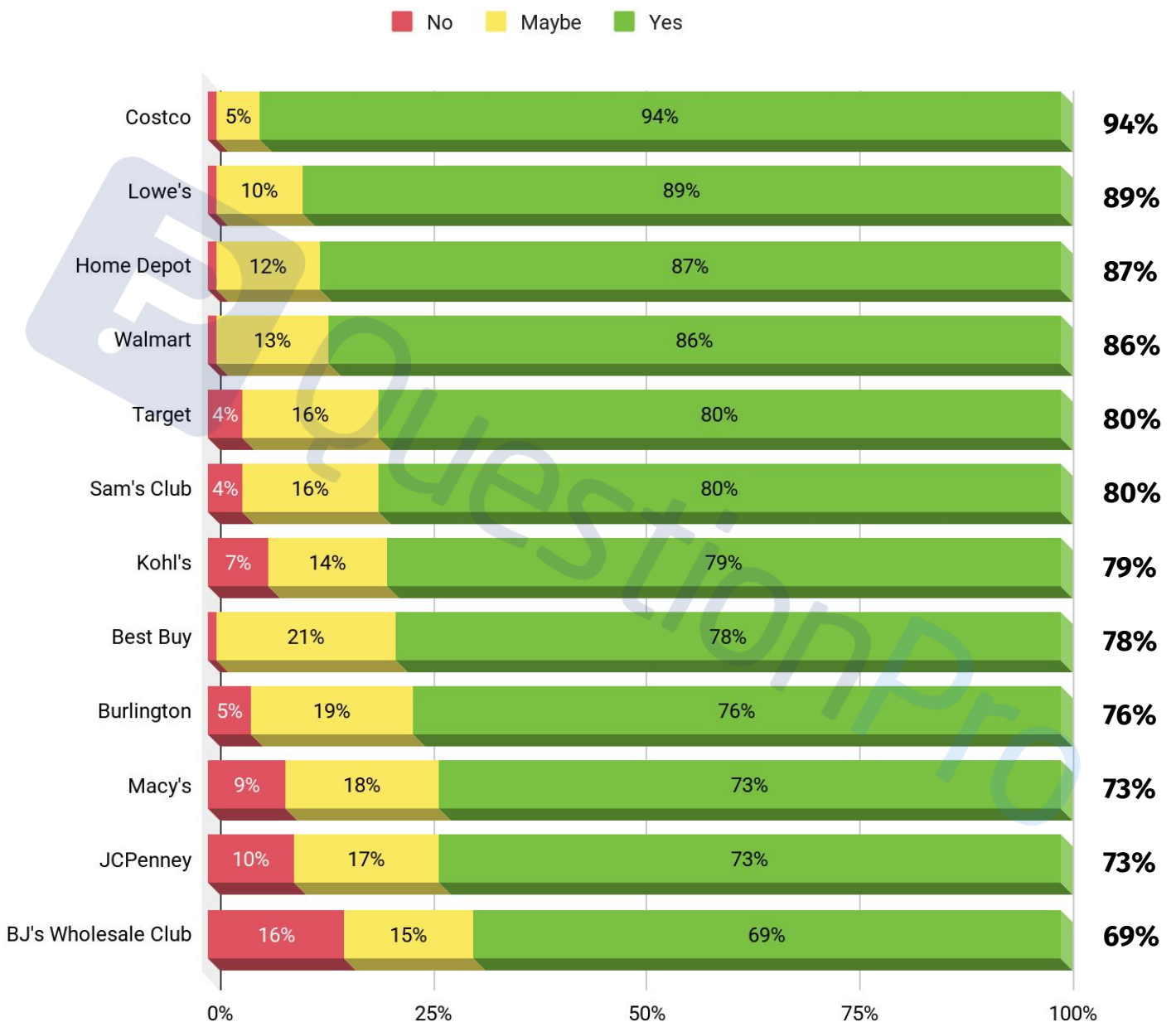
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# Q4 2025

## 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.

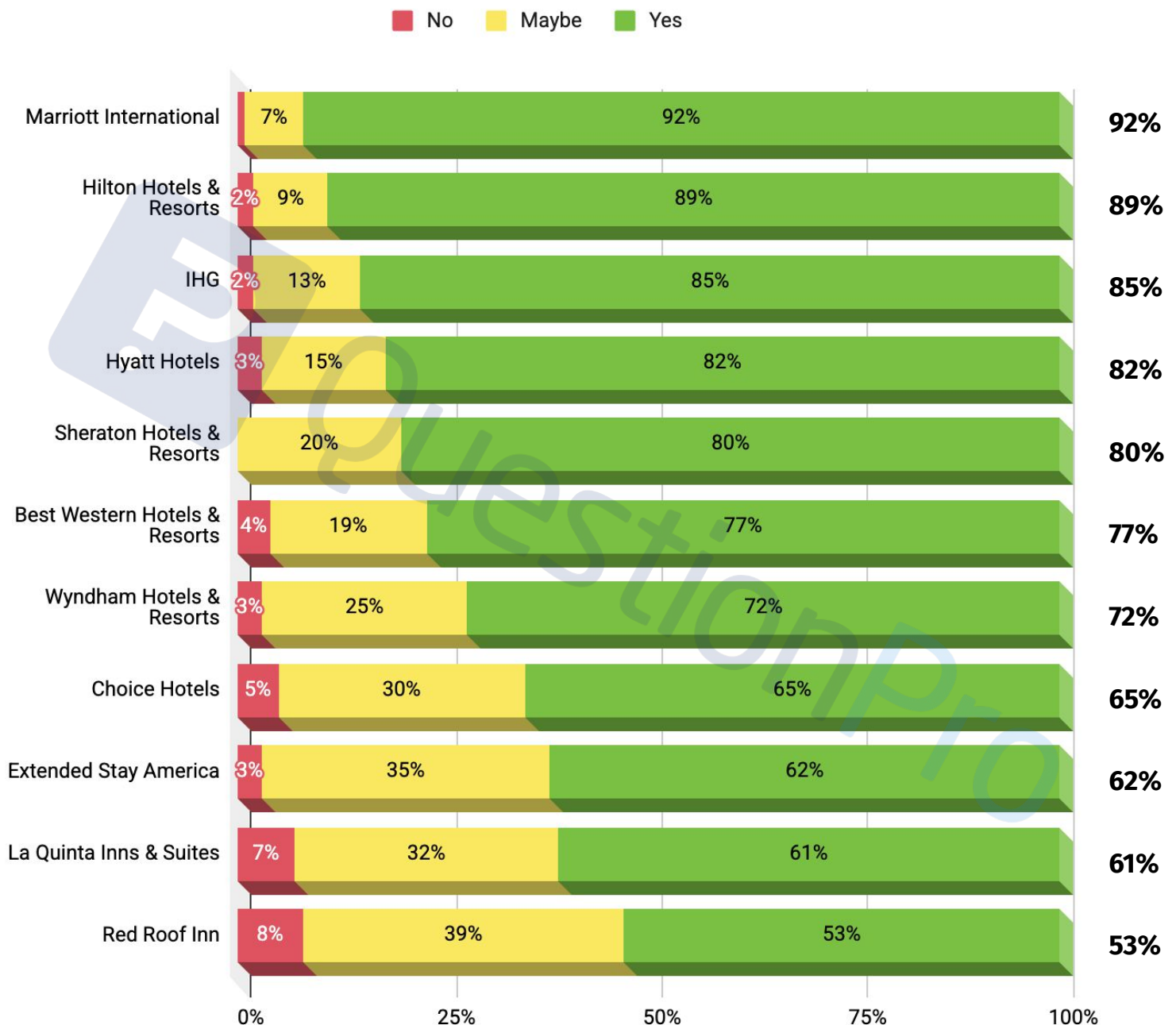
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# Q4 2025

## Future purchase intent by brands in the **hotel and hospitality** industry

Marriott International and Hilton Hotels & Resorts dominate the hospitality sector with the highest future purchase consideration rates of 92% and 89%, respectively. While most major chains maintain strong interest, budget-focused brands like Red Roof Inn and La Quinta Inns & Suites see lower definitive intent (53% and 61%).



## Q4. Future purchase intent by brands in the hotel and hospitality industry

### Purchase Intent Quarterly Comparison

In Q4, the hospitality sector saw a distinct divergence in Purchase Intent; Best Western posted the most significant rebound (77 from 67), while La Quinta Inns & Suites (61 from 78) and Choice Hotels (65 from 74) experienced sharp declines. Market leaders Marriott International (92 from 92) and Hilton Hotels & Resorts (89 from 90) maintained their dominance with little to no fluctuation.

Hotel and Hospitality	Q1	Q2	Q3	Q4
Marriott International	83	85	92	92
Hilton Hotels & Resorts	85	83	90	89
Hyatt Hotels	82	78	88	82
Best Western Hotels & Resorts	82	66	67	77
Wyndham Hotels & Resorts	82	79	75	72
Choice Hotels	76	67	74	65
La Quinta Inns & Suites	54	63	78	61

### Insights

In Q4 the top-rated brands, Marriott and Hilton, benefited from the resilience of the luxury and full-service segments, which outperformed the broader market as higher-income travelers and group business demand remained steady despite economic uncertainty. Marriott's ability to hold its peak 92% intent score aligns with its "record development pipeline" and strong international performance, effectively insulating it from the domestic softness seen in lower chain scales.

The brands with the largest volatility, La Quinta (61) and Choice Hotels (65), were hit hardest by a pullback in the budget and select-service sectors. La Quinta's dramatic 17-point drop corresponds with reports of "softness" in key leisure markets, as inflation-weary consumers reduced discretionary travel during the non-holiday windows of Q4. Best Western, conversely, defied this trend by securing a 10-point rebound, likely buoyed by its recognition as a top global brand for "trust and consistency," which resonated with pragmatic travelers seeking reliable value over risky low-cost alternatives.

While budget-conscious travelers retreated from the market, reducing intent for economy brands, those who continued to travel consolidated their loyalty around established, premium chains and trusted value operators.

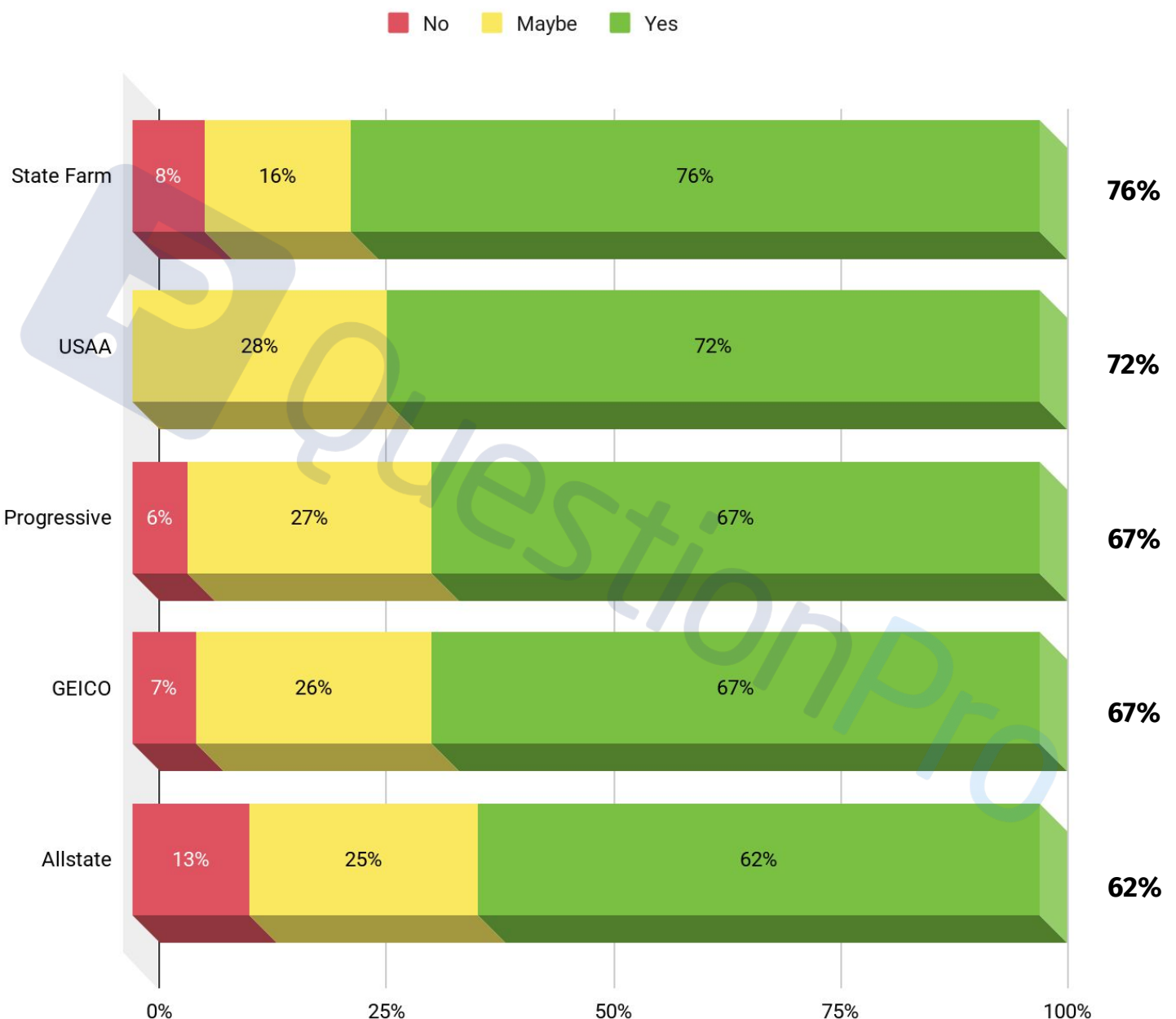
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# Q4 2025

## Future purchase intent by brands in the **insurance** industry

State Farm leads the insurance category with the highest future purchase consideration at 76%. USAA follows with strong interest at 72%, notable for having no visible "No" responses, though it has a higher "Maybe" segment (28%). In contrast, Allstate trails the group with the lowest definitive intent (62%) and the highest refusal rate of 13%.



## Q4. Future purchase intent by brands in the **insurance** industry

### Purchase Intent Quarterly Comparison

In Q4, the insurance sector experienced a sharp "market correction" where every major brand saw a significant decline in Purchase Intent; Allstate posted the steepest drop (62 from 86) and USAA fell notably (72 from 87), while State Farm (76 from 89) managed to reclaim the top spot despite the industry-wide downturn.

Insurance	Q1	Q2	Q3	Q4
State Farm	74	71	89	76
USAA	80	80	87	72
Progressive	64	66	73	67
GEICO	59	59	76	67
Allstate	60	62	86	62

### Insights

In Q4, the market leaders State Farm (76) and USAA (72) were not immune to the cooling demand but remained the most resilient choices. State Farm's ability to hold the #1 position aligns with its massive market share (approx. 17%) and "above average" claims satisfaction ratings, which helped it retain trust as customers sought stability after a volatile shopping season. The Q4 decline across the board reflects a "normalization" of the historic shopping surge seen in Q3, where shopping rates had hit "hot" levels (6.4% growth) driven by reaction to rate hikes and catastrophic weather events.

The brands with the largest volatility, Allstate (62) and GEICO (67), saw their massive Q3 gains evaporate. Allstate's dramatic 24-point drop suggests that price-sensitive customers who shopped with them during the Q3 peak likely moved on or renewed elsewhere as the brand focused on profitability and "surgical" rate adjustments rather than volume growth. This industry-wide drop in Q4 indicates that after a frenzied period of comparison shopping in Q3, consumers reached a point of "shopping fatigue" or acceptance by year-end, prioritizing renewal convenience over the hassle of switching during the holiday season.

These contrasts suggest that the shopping surge of Q3 ended, and customers retreated to established stability, punishing brands that may have attracted temporary interest solely through aggressive mid-year marketing or rate volatility.

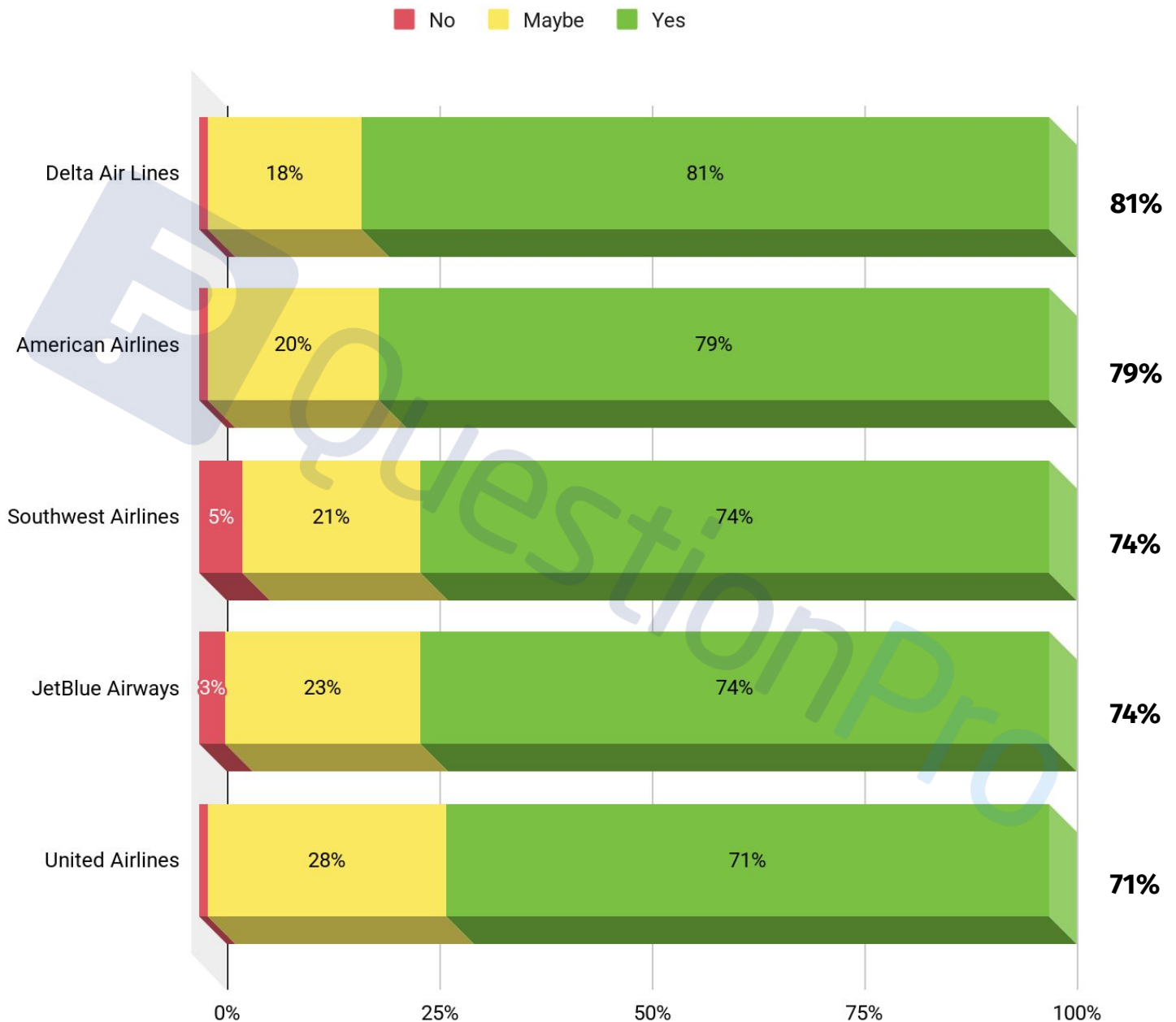
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# Q4 2025

## Future purchase intent by brands in the **airline** industry

Delta Air Lines and American Airlines lead the airline category with strong purchase intent, securing 81% and 79% "Yes" responses respectively. Southwest and JetBlue follow with identical 74% definitive interest scores, while United Airlines shows the lowest commitment at 71%, driven by a category-high 28% of undecided "Maybe" customers.



## Q4. Future purchase intent by brands in the airlines industry

### Purchase Intent Quarterly Comparison

In Q4, the airline industry experienced a universal decline in Purchase Intent; United Airlines posted the steepest drop (71 from 83) and Southwest fell significantly (74 from 85), while Delta (81 from 91) and American (79 from 88) maintained the lead despite the downturn.

Airlines	Q1	Q2	Q3	Q4
Delta Air Lines	84	85	91	81
American Airlines	81	86	88	79
Southwest Airlines	88	81	85	74
JetBlue Airways	88	86	80	74
United Airlines	76	78	83	71

### Insights

In Q4 the top-rated brands, Delta (81) and American (79), leveraged their operational reliability and premium positioning to mitigate industry-wide frustrations, with Delta successfully minimizing disruptions during the critical holiday travel window. Their ability to maintain relatively higher intent scores suggests that high-value travelers prioritized consistency over price in a constrained market.

The brands with the largest declines, United (71) and Southwest (74), faced distinct headwinds. United's 12-point drop aligns with customer confusion and friction regarding the initial implementation of its "Blue Sky" strategic partnership with JetBlue, which introduced new booking complexities. Southwest was impacted by the broader "normalization" of leisure travel, where budget-conscious consumers pulled back on discretionary spending due to rising costs.

These contrasts suggest that in the final quarter of 2025, passengers penalized complexity and uncertainty, favoring established stability as they navigated a high-cost and operationally volatile travel environment.

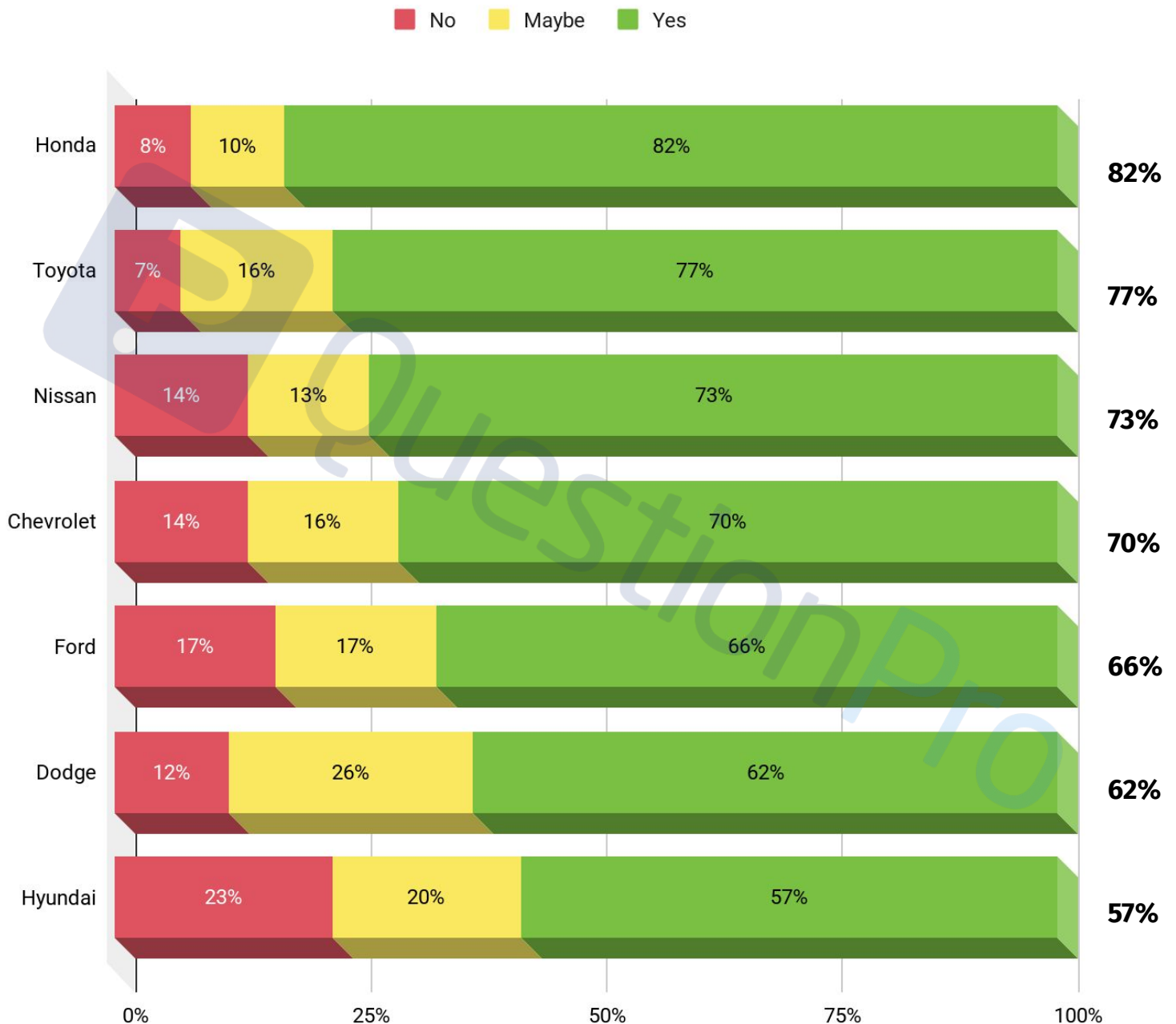
The Future Purchase Intent follow-up metric captures post-purchase loyalty by asking recent buyers, "How likely are you to purchase again from [Brand]?" Responses are reported as:  
 % Likely to Repurchase (Yes): Strong future intent  
 % At Risk (No): Potential churn signal  
 % Undecided (Maybe): Opportunity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



# 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.

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# Summary of Findings

## Key findings

The following findings provide a comprehensive view of industry and brands scoring highest and lowest in NPS, CSAT, and purchase intent.

### Net Promoter Score (NPS)

- The rankings were led by Hotel and Hospitality (38), Grocery Retail (32), and Big Box Retail (31), while Insurance (17) and Automotive (12) ended the year as the lowest-rated sectors.
- Industry leaders included USAA in both Banking (56) and Insurance (57), Costco in big Box Retail (62), and Hilton Hotels & Resorts and Sheraton Hotels & Resorts, which tied for the top spot in Hospitality (55 each).
- The sharp Automotive NPS drop (44 → 12) signals a sector-wide correction driven by post-incentive price shock, tariff-driven cost increases, and an EV/tech expectation gap, pushing buyers from deal-driven promoters to value- and reliability-focused detractors in a single quarter.
- This massive correction suggests that high-ticket, long-term commitments bore the brunt of year-end consumer frustration as financial realities set in.

### Customer Satisfaction Score (CSAT)

- Hotel and Hospitality achieved the highest top-box score at 80%, followed closely by Banking and Grocery Retail (78% each), while Automotive showed the lowest performance at 65%

- Leading brands included Marriott International (94%), Costco (89%), Chase Bank (89%), and USAA (87%).
- CSAT scores followed a nearly universal "summer peak, winter crash" pattern across all sectors. Essential service providers like Banking and Grocery demonstrated the most resilience, whereas discretionary categories like Airlines and Automotive saw double-digit corrections as interest rates and operational strains soured the purchase experience.

### Future Purchase Intent

- Costco led big box retail with 94% intent, Meijer (92%) and Aldi (91%) commanded the grocery sector, and Marriott International (92%) led hospitality. In the automotive and airline sectors, Honda (82%) and Delta Air Lines (81%) secured the highest consideration.
- Consumers prioritized value maximization and established stability, with warehouse clubs and hard discounters like Costco and Aldi posting rebounds while regional or premium grocers like Wegmans saw notable declines.
- Brands that relied on temporary promotional rates or discretionary impulse buys were punished, while those with membership models or proven consistency, such as USAA and Capital One, acted as a protective moat against the downturn.

## Conclusion

2025 was defined by a dramatic "rise and fall" trajectory across all sectors, where a steady first half gave way to a universal Q3 surge only to end with a synchronized Q4 correction.

This year-end collapse effectively erased the record-high gains of Q3, dragging every major industry back to its lowest satisfaction levels of the year.

As consumers faced year-end financial realities, including high interest rates, premium hikes, and inflation fatigue, their patience for operational friction or "price normalization" disappeared.

This led to a stark performance gap between industries; while essential service providers like Banking and Grocery demonstrated comparison resilience, high-ticket or discretionary categories like Automotive and Insurance suffered extreme volatility and severe collapses in sentiment.

The final results reflect a universal reset in customer tolerance, as prioritizing stability and value maximization over brand exploration.

Market leaders like USAA and Costco thrived by remaining steady, while competitors that buckled under seasonal pressure lost ground.

This trend proves that operational consistency is the only true "moat" today, because in this market, one operational failure is all it takes to reset consumer trust to zero.

# 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

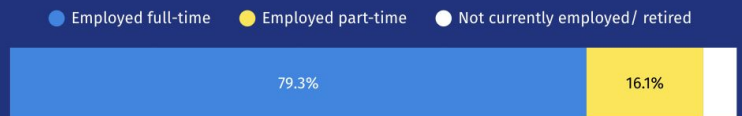
## Survey period

November 2025

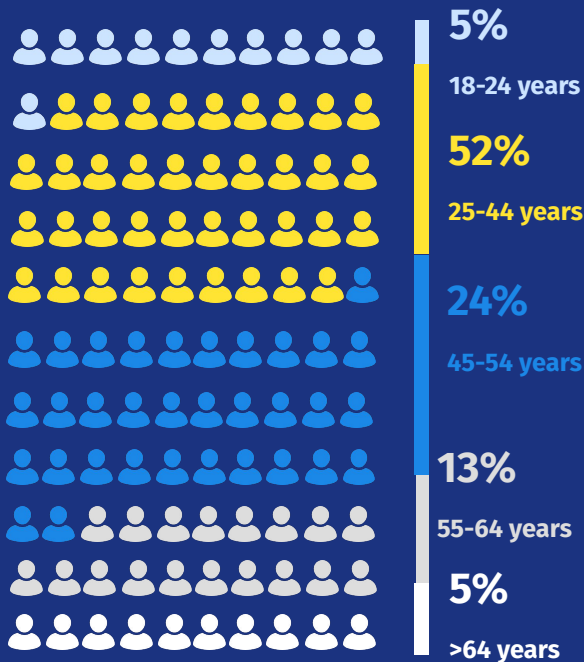
## Gender



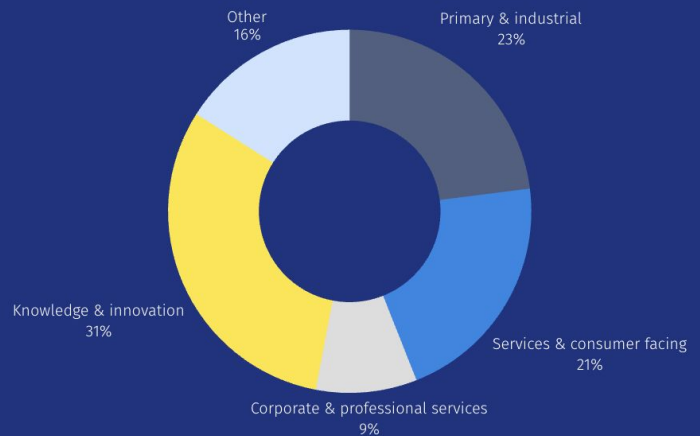
## Job status



## 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](mailto: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**

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