What Really Matters to Americans

The 2025 Customer Value Report

A NATIONWIDE SURVEY OF 3,000 U.S. RESIDENTS QUANTIFIES WHAT THEY VALUE ACROSS 18 BUSINESS SECTORS

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The Center for Customer-Based Execution and Strategy (C-CUBES)

The Center for Customer-Based Execution and Strategy (C-CUBES) enables scholars to develop cutting-edge, peer-reviewed research practices and insights related to customer-based strategy. C-CUBES's mission is to share these research-driven insights with both for-profit and not-for-profit organizations, aiming to enhance customer value, employee engagement and shareholder returns.

Legacy strategy planning often lacks a customer focus and shows little or no correlation with financial performance. So the center seeks to reimagine strategy planning and execution in organizations from a science-driven perspective.

C-CUBES leverages strong connections in key industries — such as energy, healthcare, education and technology — to examine, inform and improve these aspects of organizations to benefit the larger community. Our goal is to unite diverse business disciplines to improve strategy, customer value, employee engagement and overall performance.

We invite you to explore the center at business.rice.edu/center-customer-based-execution-strategy

Citation

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"U.S. consumers power not only the nation's economy – they also support the world economy. Business leaders, customer advocates, regulators and policymakers need accurate and quantifiable insights into the factors that drive value for them.

The 2025 Customer Value Report is an invaluable resource for organizational leaders hoping to craft a science-based and customer-focused strategy. It is also an important tool for regulators working to support consumers. The ultimate goal is to improve organizations, while also delivering higher value for customers.

I am pleased to share this landmark report by the Center for Customer-Based Execution and Strategy at Rice Business. It is a testament to Rice University's commitment to serve multiple stakeholders with rigorous research that is both practical and useful."

Peter Rodriguez
Dean, Rice Business

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Customer Value

Though most enterprises claim to be "customer-focused" or "customer-centric," few actually are. A major impediment is their inability to identify and rank order customer value drivers. For example, customers in one sector may derive more value from quality than price, whereas customers in another sector may value access to services more than quality. Today, there are important questions about the relative value of drivers like safety, sustainability, and diversity, equity and inclusion (DEI). Are these ranked higher than or lower than benefits like quality and price?

In the absence of scientifically valid and credible research, organizational leaders are left to rely on guesswork and intuition to ascertain the attributes and rank these drivers. However, research shows that executives are bad at ranking value drivers. In most studies, executives' and customers' rankings of the drivers are virtually uncorrelated.[1]

To provide value to customers, executives need a scientifically valid way to measure and prioritize the different benefits customers seek from goods and services. The 2025 Customer Value Report, an empirically sound research study quantifying the importance customers place on different value drivers, is the tool they need.

> # The most important single thing is to focus obsessively on the customer."
>
> **Jeff Bezos**
> *Founder of Amazon*

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[1] Mittal, Vikas, and Shrihari Sridhar (2021), Focus: How to Lead Strategy and Improve Execution to Achieve Growth, Palgrave Macmillan.

Customer Value Drivers for 18 Sectors

The 2025 Customer Value Report identifies specific attributes (or value drivers) that consumers use to evaluate 18 sectors (for-profit and not-for-profit). These sectors represent the complete lived experience of the U.S. consumer. As shown in Figure 1 below, they include important services and products ranging from education to medicine, mobile services, automotive care, healthcare, housing, groceries, banking and law enforcement. The value drivers for each sector are determined through a combination of secondary and qualitative research.

A key contribution of this research report is to enable different stakeholders to make comparisons across the business sectors. Figure 1 displays the sectors and the sample size.

Figure 1: Sectors Examined

18 SECTORS VALUE DRIVERS

LAW ENFORCEMENT 506
HEALTHCARE PROVIDERS 504
HEALTHCARE INSURANCE 512
AUTOMOTIVE FUEL/POWER 504
K-12 EDUCATION 511
HIGHER EDUCATION 502
FINANCIAL SERVICES 500
BANKING 508
PAYMENT SERVICES 502
GROCERY & FOOD STORES 520
AUTOMOTIVE 508
STREAMING SERVICES 502
MOBILE SERVICE CARRIERS 508
AIRLINES 518
HOTELS 504
PHARMA MEDICIINES 506
HOUSEHOLD POWER 508
RESIDENTIAL HOUSING 518

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EXECUTION AND STRATEGY

Ranking and Prioritizing the Value Drivers Within Each Sector

We use two well-established research methodologies to elicit customers' importance ranking of the different value drivers:[2]

Importance rating task:

Customers rate the importance of different drivers using a 10-point scale, where 1 represents "Not at all important" and 10 represents "Extremely important."

Point allocation task:

Customers allocate 100 points among the different attributes, with higher point allocation indicating higher importance.

As our results show, the findings using both approaches are largely consistent. Specifically, higher importance ratings and/or point allocation imply that an attribute is valued more by customers. Each sector's results are displayed separately for rating and ranking.

RANKING & PRIORITIZING

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[2] Bottomley, Paul A., John R. Doyle, and Rodney H. Green (2000), "Testing the reliability of weight elicitation methods: direct rating versus point allocation," *Journal of Marketing Research*, 37(4), 508–513.

RESEARCH METHODOLOGY

Research Methodology

- C-CUBES designed a survey to measure the importance customers place on various value drivers in key industries.

- The survey was hosted online by TRC Insights during March 3–12, 2025.

- A nationally representative sample was collected and stratified by gender, age and income to reflect the proportion of each demographic group in the U.S. population. The sample is described in Table 1.

- Responses were obtained from 3,063 participants who rated up to three of the possible 18 sectors, for a total of 9,141 responses.

- To ensure unbiased results, the sectors evaluated by each participant were selected randomly from the set of all sectors with which they had experience. Question order and items were also randomized, with half of the respondents being asked about importance ratings first and the other half first being asked about point allocation.

- Participants provided data on basic demographics, such as education, marital status and living situation, along with information about their behavior related to the specific categories.

- All reported confidence intervals are at the 95% level.

Table 1: Sample Description (N=3,063)

GENDER	Percent
Male	49%
Female	51%

AGE	Percent
18-24	11%
25-34	15%
35-44	18%
45-54	17%
55-64	16%
65-74	14%
75+	8%

RACE/ETHNICITY	Percent
White	67%
Black/African American	16%
Asian	4%
Hispanic	11%
Other	2%

REGION	Percent
South	41%
Midwest	21%
Northeast	21%
West	17%

INCOME	Percent
Less than $25,000	16%
$25,000-$49,999	19%
$50,000-$74,999	17%
$75,000-$99,999	13%
$100,000-$149,999	17%
$150,000+	19%

POLITICAL AFFILIATION	Percent
Republican	40%
Democrat	35%
Independent	24%

Healthcare Providers

Customers of healthcare services firms provided their importance of the value drivers shown in the figure below. The top three value drivers are:

- Quality of care
- Cost/affordability
- Personalized care and attention

The least important driver is:

- Diversity, equity and inclusion

The results were largely consistent between the rating scale and point allocation methodologies.

Figure 1: Healthcare Providers

C-CUBES 2025 Customer Value Drivers Study

Healthcare Providers

	Mean Importance Rating	Mean Allocation
Quality of care (the quality of advice, care and medical treatment you receive)	8.6	24.3
Cost/affordability (the amount you pay out of pocket including premium, copay, deductibles, etc.)	8.1	20.1
Personalized care and attention (attentiveness to individual needs, treatment plans based on your needs)	8.1	17.2
Utilizes the latest treatments and technology (treatment uses the latest procedures, modern facilities and equipment)	7.9	14.8
Convenience (appointment availability, wait time to see provider, travel time to facility, etc.)	7.8	14.1
Diversity, equity and inclusion (healthcare provider prioritizes having a diverse workforce, promotes equitabile hiring and tries to meet the needs of minority patients)	5.9	9.5
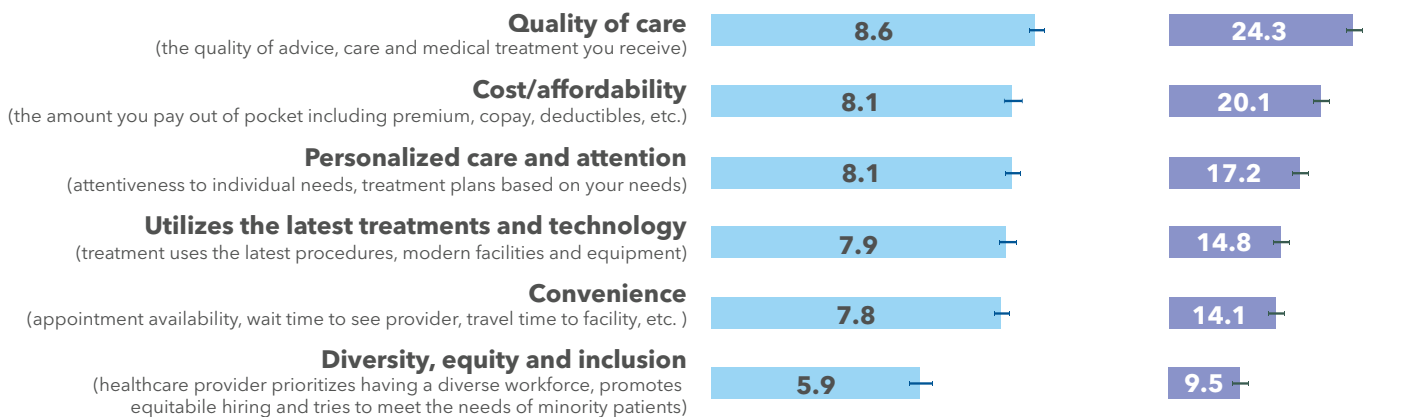
Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Healthcare Insurance

Customers of healthcare insurance provided their importance of the value drivers shown in the figure below. The top three value drivers include:

- Quality of care
- Cost/affordability
- Coverage

The least important driver is:

- Diversity, equity and inclusion

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 2: Healthcare Insurance

C-CUBES 2025 Customer Value Drivers Study

Healthcare Insurance

	Mean Importance Rating	Mean Allocation
Quality of care (the quality you receive from healthcare providers you can access through the insurance company)	8.5	22.2
Cost/affordability (the total amount you pay out of pocket including premium, copay, deductibles, etc.)	8.3	20.4
Coverage (the breadth of medical conditions, benefits and services covered)	8.3	19.3
Access to care (ability to get care from the best doctors, clinics and hospitals for your healthcare needs)	8.3	16.8
Ease of understanding plan and coverage (knowing what's covered, how much you'll have to pay out of pocket, where to go to for care, how to submit claims, etc.)	7.8	12.7
Diversity, equity and inclusion (healthcare provider prioritizes having a diverse workforce, promotes equitable hiring and tries to meet the needs of minority patients)	5.7	8.6

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Automotive Fuel / Power

Customers of automotive fuel/power provided the importance of the value drivers shown in the figure below. The top three value drivers include:

- Cost/affordability
- Quality/reliability
- Convenience

The least important drivers include:

- Diversity, equity and inclusion
- Sustainability/carbon impact

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 3: Automotive Fuel / Power

C-CUBES 2025 Customer Value Drivers Study

Automotive Fuel/Power

	Mean Importance Rating	Mean Allocation
Cost/affordability (low price, easy to afford by an average household)	8.3	26.5
Quality/reliability (consistent fuel quality, reliably available at all times)	8.1	21.7
Convenience (easy access to gas stations, easy access to charging stations for electric vehicles, ease of payment and refueling options)	7.8	17.8
Handling outages (easily available even during natural disasters like flooding/hurricane, gets supply back up fast after natural disasters)	7.1	12.9
Sustainability/carbon impact (fuel option has lowest possible carbon emissions, minimizes environmental impact, complies with Paris Accord goals)	6.0	11.8
Diversity, equity and inclusion (fuel provider prioritizes having a diverse workforce, promotes equitable hiring, and invests to meet the needs of minority and underrepresented communities)	5.2	9.3
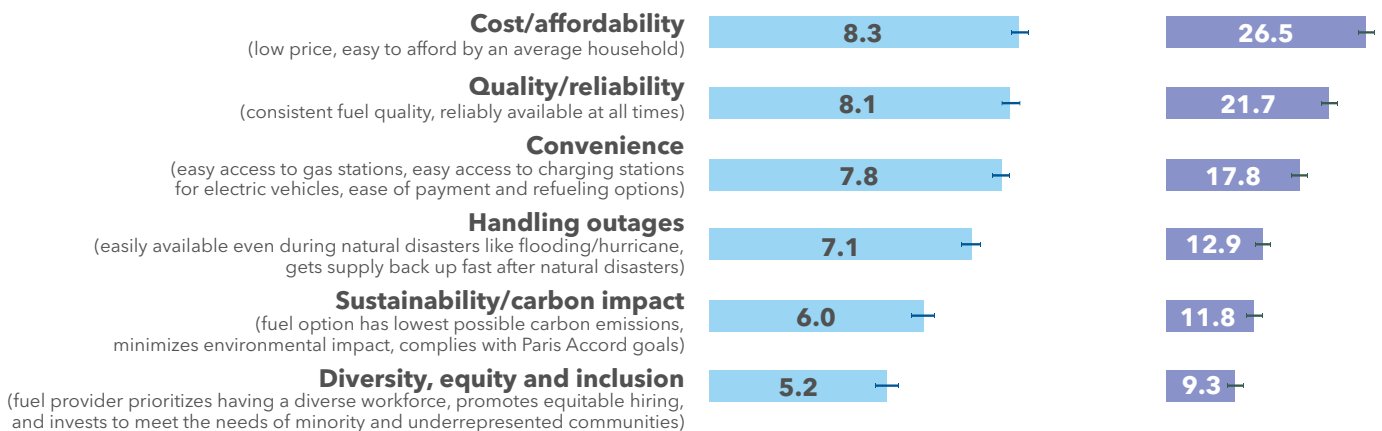
Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
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Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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K-12 Education

Parents/guardians of children in K-12 education provided their importance of the value drivers as shown in the figure below. The top three value drivers include:

- Safety

- Quality of teachers

- Academics and learning

The least important driver is:

- Diversity, equity and inclusion policies

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 4: K-12 Education

C-CUBES 2025 Customer Value Drivers Study

K-12 Education

	Mean Importance Rating	Mean Allocation
Safety (physical and psychological safety of students)	8.7	20.0
Quality of teachers (high-quality teachers who focus on students, qualified teachers)	8.6	18.8
Academics and learning (high-quality academics and learning for students, teachers who focus on student learning, students score well on exams and tests)	8.6	20.4
Parent and family engagement (staff, teachers and administration respect parents, provide complete information and cultivate a good relationship with students' families)	8.2	14.9
Physical facilities, technology infrastructure (schools have modern facilities, use latest technology, etc.)	8.0	14.0
Diversity, equity and inclusion (school prioritizes having diverse teachers and staff, school integrates DEI topics for students, and ensures that minority and disadvantaged students achieve outcomes equal to majority/advantaged student populations)	7.1	11.9

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Higher Education

Consumers of higher education provided their importance of the value drivers as shown in the figure below. The top two value drivers include:

- Affordability/cost

- Quality of teaching and academics

The least important driver is:

- Diversity, equity and inclusion policies

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 5: Higher Education

C-CUBES 2025 Customer Value Drivers Study

Higher Education

	Mean Importance Rating	Mean Allocation
Affordability/cost (tuition costs, financial aid availability)	8.3	27.2
Quality of teaching and academics (quality of academics and learning, ability of students to get high paying jobs upon graduation)	8.3	25.4
Quality of faculty and research (world-recognized faculty, creation of leading-edge research, produces high-quality knowledge)	7.7	17.8
Physical facilities, technology, infrastructure (has modern facilities, latest IT technology, facilities support high-quality education/research)	7.4	17.3
Diversity, equity and inclusion policies (prioritizes having diverse faculty and staff, integrates and teaches DEI topics to students, and ensures minority and disadvantaged students achieve similar outcomes to majority/advantaged populations)	5.9	12.3
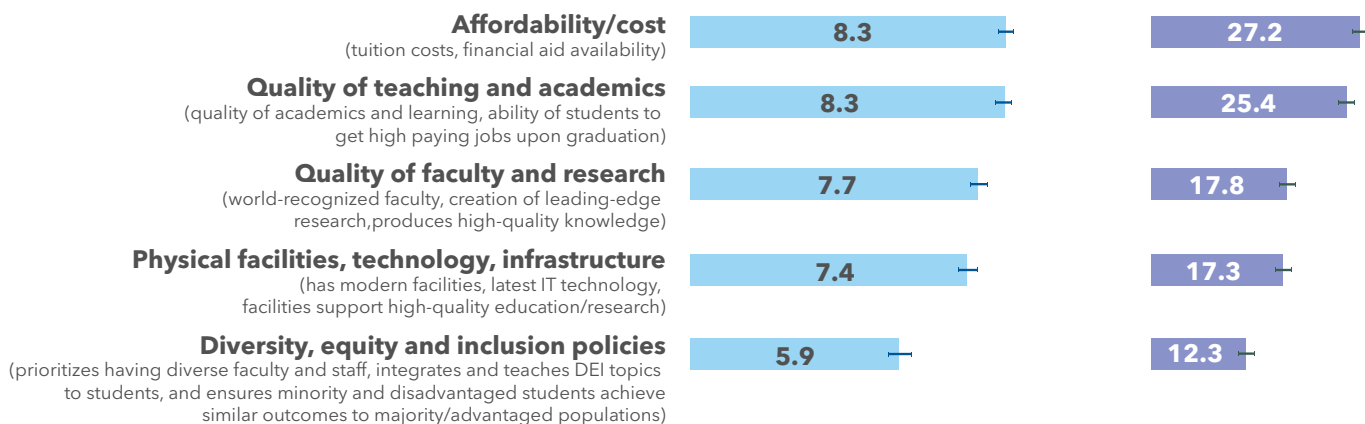
Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Financial Investments / Services

Customers of financial investments/services provided the importance of the value drivers as shown in the figure below. The top three value drivers include:

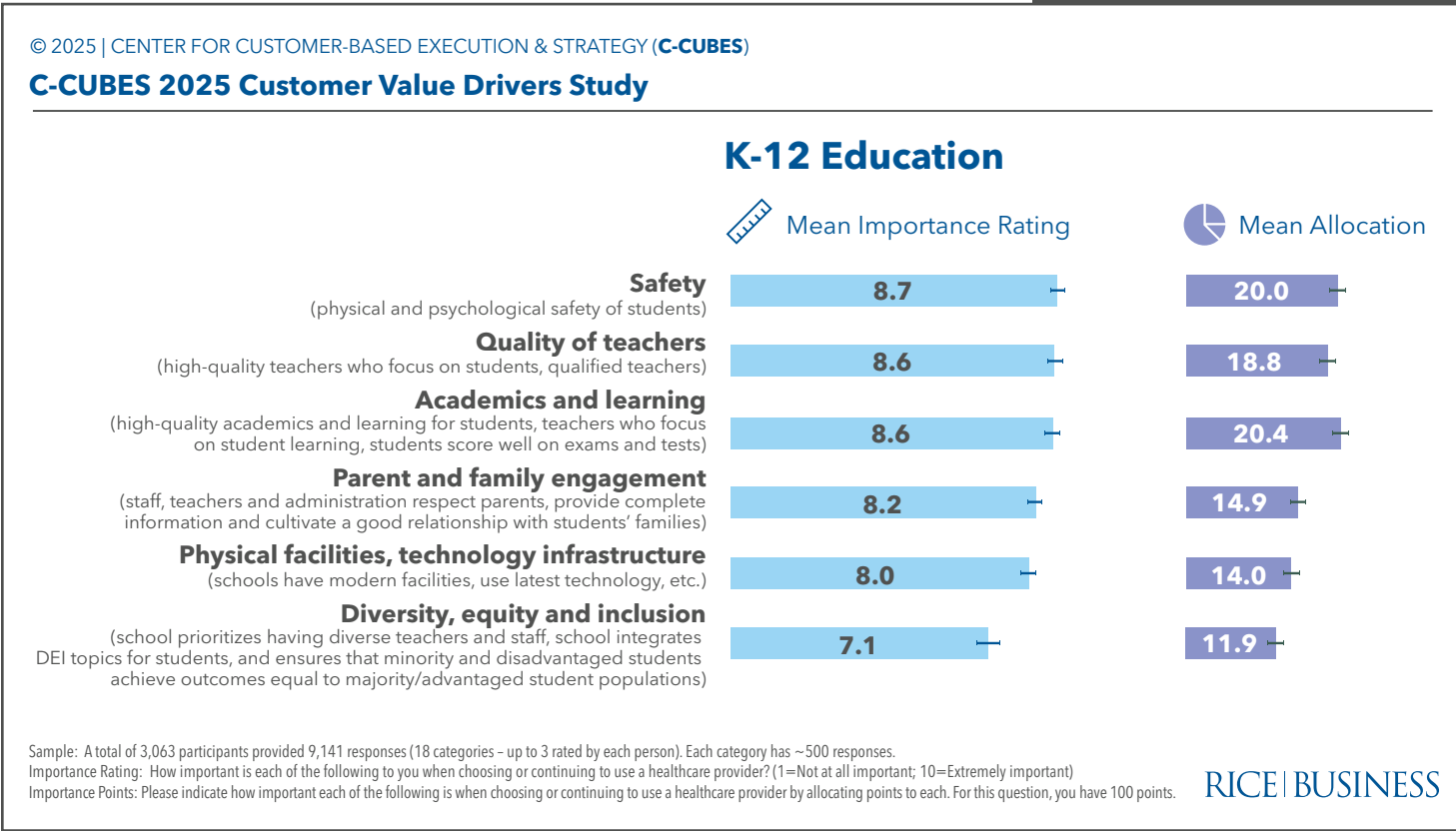- Safety/security

- Rate of return

- Cost/fees

The least important driver is:

- Diversity, equity and inclusion policies

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 6: Financial Investments / Services

C-CUBES 2025 Customer Value Drivers Study

Financial Investments/Services

	Mean Importance Rating	Mean Allocation
Safety/security (your personal information and money are safe with the investment company, no data breaches, online investing is safe)	8.3	20.7
Rate of return (the interest, yield, or return earned on your deposits and investments with the investment company	8.1	21.9
Cost/fees (service fees and other costs charged, no hidden fees)	8.0	17.5
Reputation (investment company is trusted, highly rated, and responsible)	7.7	15.0
Customer support (easy to talk to the right person, easy to find answers to questions, access to expert advice, resolves problems quickly and correctly)	7.7	15.4
Diversity, equity and inclusion (firm maintains diverse staff and employees, focuses on equity among employees and customers, supports minority-owned businesses, has inclusive policies for customers)	5.6	9.5

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Banking

Customers of banking institutions provided the importance of the value drivers as shown in the figure below. The top three value drivers include:

- Safety/security

- Fees and charges

Customer support appears among the top value drivers using the rating scale methodology, while the point allocation methodology indicated convenience, along with safety and fees as more important than customer support.

The least important driver across both methodologies is diversity, equity and inclusion.

Figure 7: Banking

C-CUBES 2025 Customer Value Drivers Study

Banking

	Mean Importance Rating	Mean Allocation
Safety/Security (your personal information and money are safe with the bank, no data breaches, online banking is safe)	8.4	22.1
Fees and charges (charge the lowest fees, no hidden fees, low cost of banking)	8.1	18.4
Customer support (easy to talk to the right person, easy to find answers to questions, access to live support, resolves problems quickly and correctly)	7.9	15.1
Convenience (has a banking facility close to your home, bank branch has convenient hours, easy/convenient online banking)	7.7	17.6
Rate of return on savings and investments (the interest given on your deposits with the bank, returns on investments with the bank)	7.4	16.4
Diversity, equity and inclusion (bank maintains diverse staff and employees, focuses on equity among employees and customers, supports minority-owned businesses, has inclusive policies for customers)	5.6	10.4

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Payment Services

Customers of payment services provided the importance of the value drivers as shown in the figure below. The top four value drivers include:

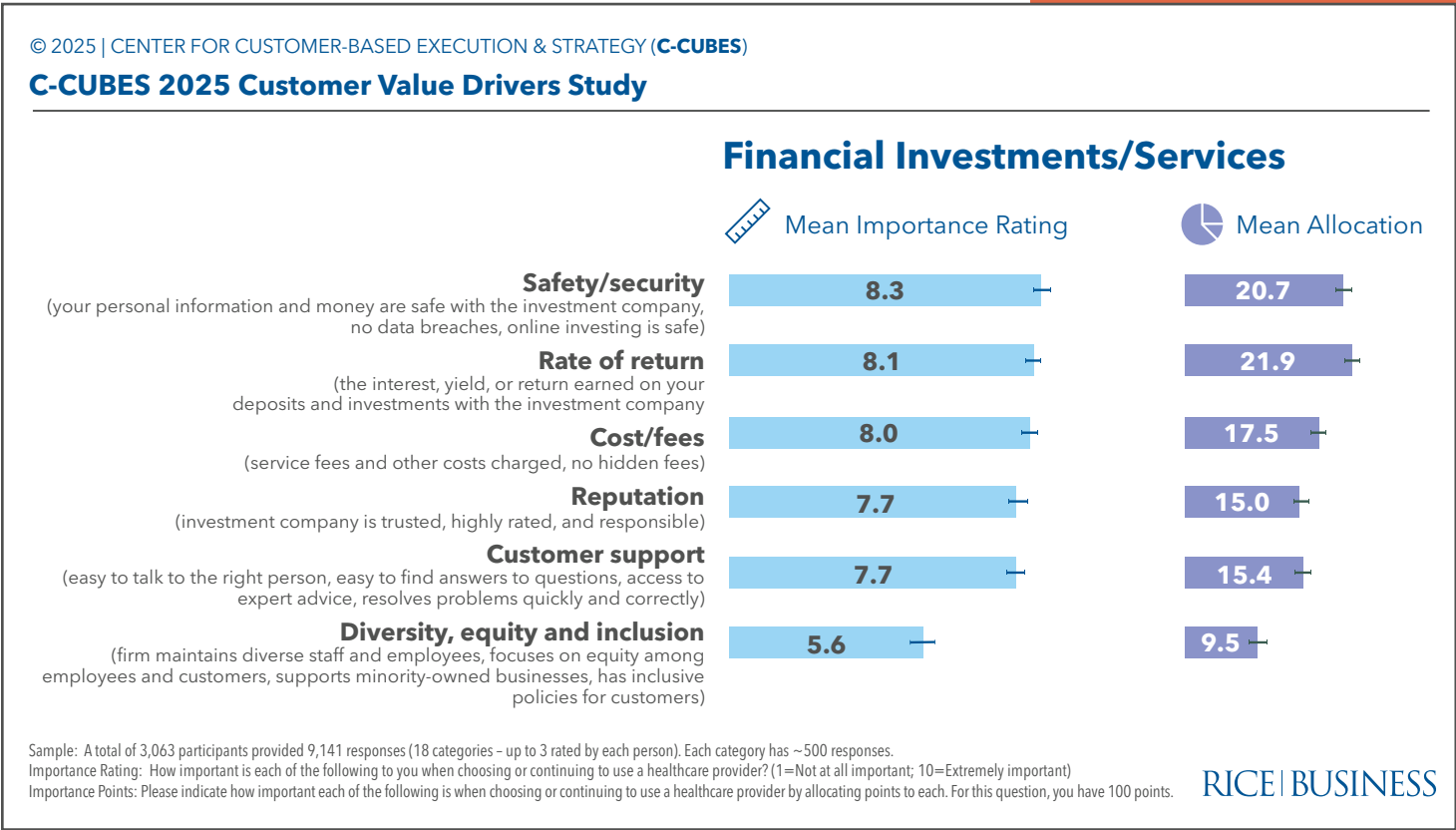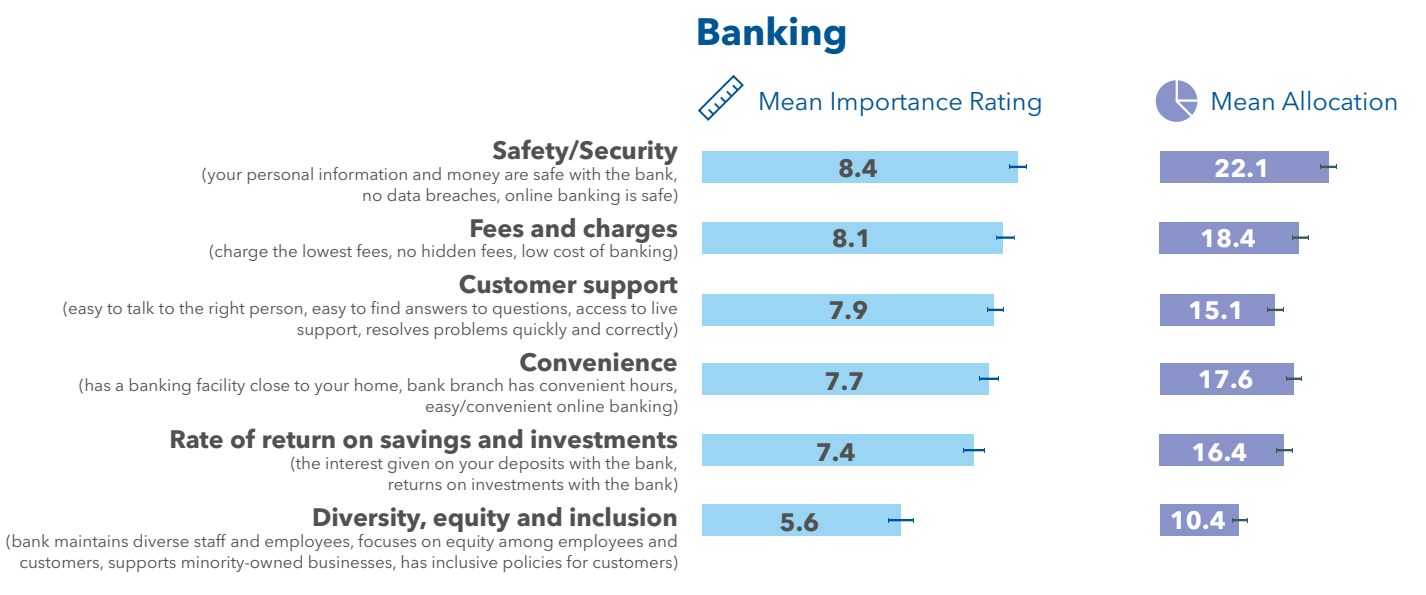- Safety/security

- Cost/fees

- Ease of use

- Broadly accepted

The least important driver is:

- Diversity, equity and inclusion

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 8: Payment Services

C-CUBES 2025 Customer Value Drivers Study

Payment Services
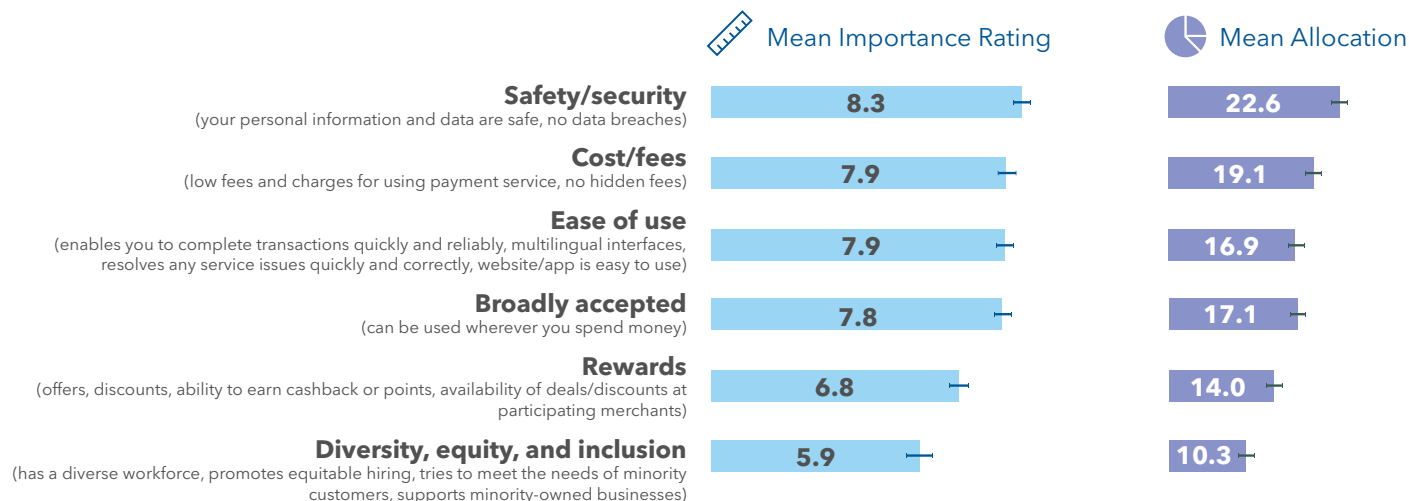
	Mean Importance Rating	Mean Allocation
Safety/security (your personal information and data are safe, no data breaches)	8.3	22.6
Cost/fees (low fees and charges for using payment service, no hidden fees)	7.9	19.1
Ease of use (enables you to complete transactions quickly and reliably, multilingual interfaces, resolves any service issues quickly and correctly, website/app is easy to use)	7.9	16.9
Broadly accepted (can be used wherever you spend money)	7.8	17.1
Rewards (offers, discounts, ability to earn cashback or points, availability of deals/discounts at participating merchants)	6.8	14.0
Diversity, equity, and inclusion (has a diverse workforce, promotes equitable hiring, tries to meet the needs of minority customers, supports minority-owned businesses)	5.9	10.3

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Grocery and Food Stores

Customers of grocery and food stores provided their importance of the value drivers as shown in the figure below. The top two value drivers include:

- Cost/affordability
- Quality

The least important drivers include:

- Diversity, equity and inclusion
- Sustainability/carbon impact

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 9: Grocery and Food Services

C-CUBES 2025 Customer Value Drivers Study

Grocery and Food Stores

	Mean Importance Rating	Mean Allocation
Cost/affordability (the total price of food and groceries, availability of deals/discounts)	8.2	25.2
Quality (quality and freshness of items sold, availability of organic options)	8.1	21.5
Variety/product selection (wide variety of products and brands, large selection of items)	7.8	16.5
Convenience (the distance between your residence and grocery store, free parking, online ordering and pickup curbside, convenient hours of operation, store organization/cleanliness)	7.7	17.1
Sustainability/carbon impact (minimizes carbon impact of items sold, minimizes food miles and promotes sustainable agriculture)	5.7	10.3
Diversity, equity and inclusion (has a diverse workforce, promotes equitable hiring, inclusively meets the needs of minority customers, supports minority-owned businesses)	5.6	9.4

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Automotive

Customers of automotives provided the importance of the value drivers shown in the figure below. The top three value drivers include:

- Reliability, safety and maintenance

- Cost/affordability

- Performance and features

The least important drivers were:

- Diversity, equity and inclusion

- Country of manufacture
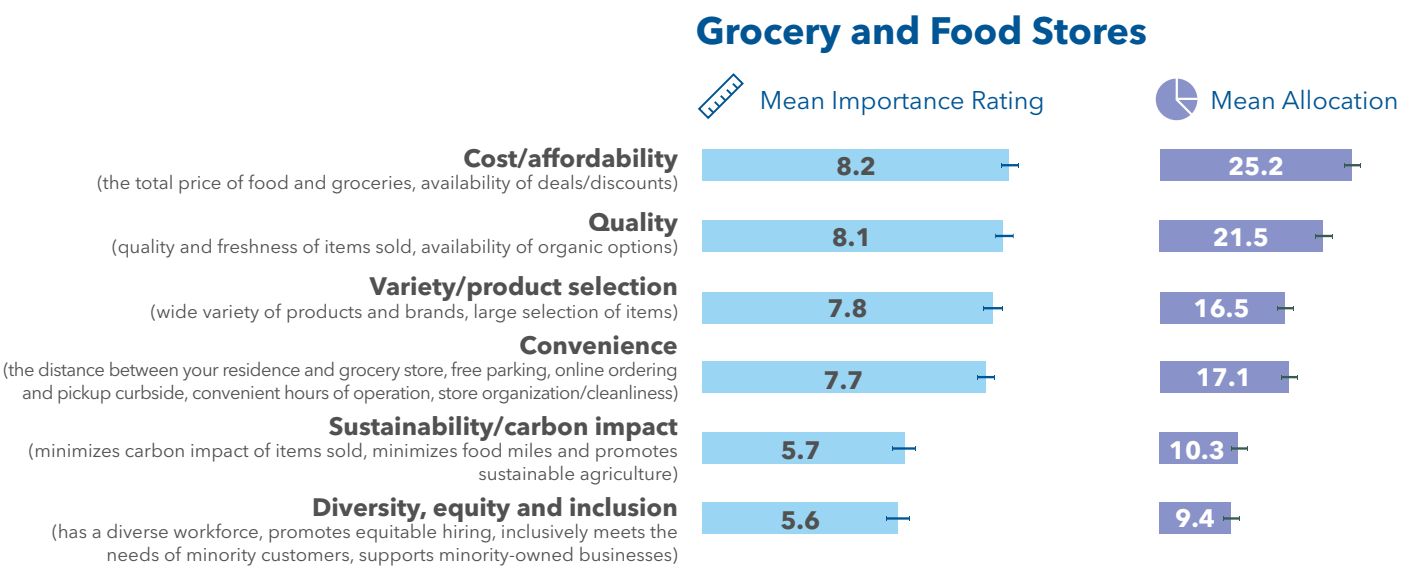
- Sustainability/carbon impact

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 10: Automotive

C-CUBES 2025 Customer Value Drivers Study

Automotive

	Mean Importance Rating	Mean Allocation
Reliability, safety, and maintenance (does not break down, low maintenance cost, low recalls, safety features, lasts a long time)	8.3	21.6
Cost/affordability (purchase price, financing options, resale value)	8.2	21.0
Performance and features (has good features including styling, roominess, acceleration, entertainment system, interior design)	7.7	16.0
Brand reputation (reputation for trustworthiness, customer satisfaction, reviews)	7.2	13.4
Sustainability/carbon impact (commitment to low carbon emissions, use of renewable energy sources like hydrogen and lithium batteries, uses eco-friendly manufacturing processes to minimize carbon impact)	6.1	9.7
Country of manufacture (made in America versus Europe versus Asia)	6.1	9.8
Diversity, equity and inclusion (auto manufacturer prioritizes having a diverse workforce, promotes equitable hiring, focuses on meeting the needs of minority and underrepresented communities, ensures supplier diversity)	5.4	8.5

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Streaming Services

Customers of streaming services provided the importance of the value drivers as shown in the figure below. The top three value drivers include:

- Cost/affordability
- Content selection
- Streaming quality

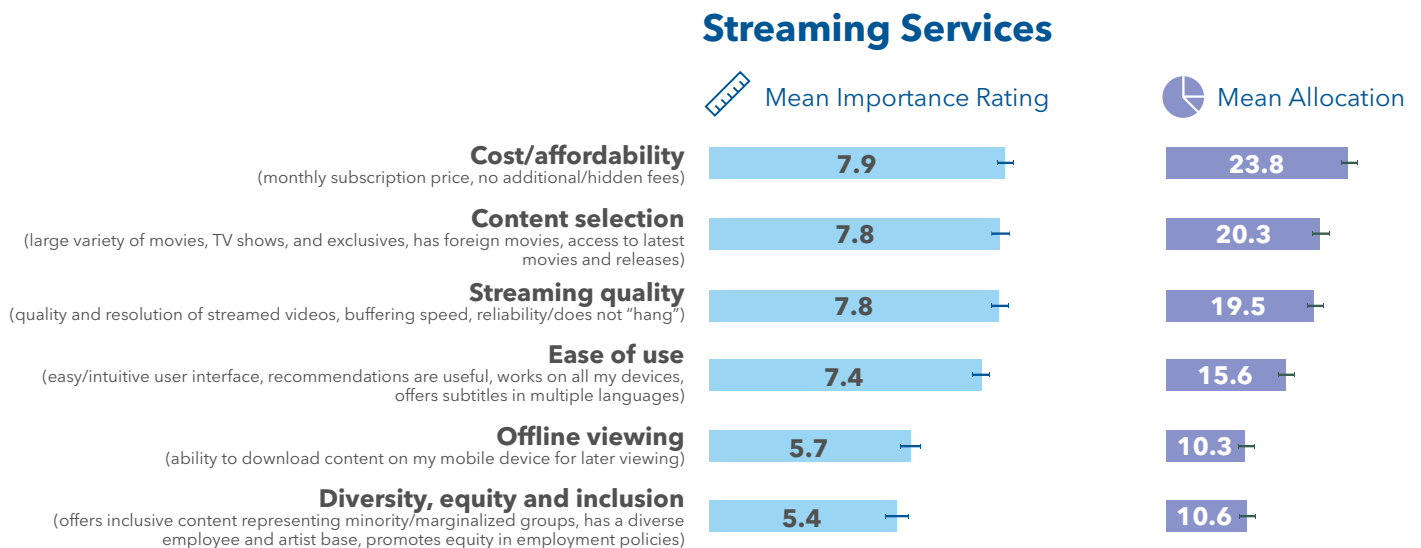The least important drivers are:

- Diversity, equity and inclusion
- Offline viewing options

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 11: Streaming Services

C-CUBES 2025 Customer Value Drivers Study

Streaming Services

	Mean Importance Rating	Mean Allocation
Cost/affordability (monthly subscription price, no additional/hidden fees)	7.9	23.8
Content selection (large variety of movies, TV shows, and exclusives, has foreign movies, access to latest movies and releases)	7.8	20.3
Streaming quality (quality and resolution of streamed videos, buffering speed, reliability/does not "hang")	7.8	19.5
Ease of use (easy/intuitive user interface, recommendations are useful, works on all my devices, offers subtitles in multiple languages)	7.4	15.6
Offline viewing (ability to download content on my mobile device for later viewing)	5.7	10.3
Diversity, equity and inclusion (offers inclusive content representing minority/marginalized groups, has a diverse employee and artist base, promotes equity in employment policies)	5.4	10.6

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Mobile Service Carriers

Customers of mobile service carriers provided the importance of the value drivers as shown in the figure below. The top three value drivers were:

- Cost/affordability

- Network coverage

- Data speed

The least important driver is:

- Diversity, equity and inclusion

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 12: Mobile Service Carriers

C-CUBES 2025 Customer Value Drivers Study

Mobile Service Carriers

	Mean Importance Rating	Mean Allocation
Cost/affordability (monthly plan pricing, no hidden fees, discounts)	8.3	22.8
Network coverage (reliability of service, signal strength, rural/urban coverage)	8.2	21.6
Data speed (fast and consistent 5G/4G performance, easy to download online content)	8.0	18.7
Customer service (easy to contact customer service, resolves issues quickly and correctly, availability of 24/7 support, multilingual customer service)	7.6	14.2
Plan flexibility (ability to change plans, family/shared data options, has a variety of plans to choose from)	7.3	13.4
Diversity, equity and inclusion (has a diverse workforce, promotes equitable hiring, is inclusive and meets the needs of minority customers, supports minority-owned businesses)	5.7	9.2

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Airlines

Customers of airlines provided their rated the importance of value drivers as shown in the figure below. The top three value drivers are:

- Safety
- Cost/affordability
- Convenience

The least important drivers are:

- Diversity, equity and inclusion
- Sustainability/carbon impact

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 13: Airlines

C-CUBES 2025 Customer Value Drivers Study

Airlines

Value Driver	Mean Importance Rating	Mean Allocation
Safety (safety record, planes are high quality and reliable, no/low likelihood of accidents, passenger safety)	8.5	27.0
Cost/affordability (competitive ticket prices, no/low baggage fees, no hidden/additional charges, loyalty programs with upgrades or reward miles)	8.2	21.8
Convenience (availability of direct flights, flexible flight schedules, offers a wide variety of routes, reliable departure/arrival times, flights are not cancelled, ease of booking flights, handling of customer issues)	7.8	17.7
In-flight comfort and amenities (legroom, comfortable seats, Wi-Fi, in-flight entertainment, provides beverage/food, polite flight attendants)	7.4	15.1
Sustainability/carbon impact (has fuel-efficient aircraft to minimize carbon emissions, use alternative/sustainable fuels, participates in carbon offset programs, uses sustainable materials in customer service, has green/sustainability initiatives)	5.9	9.9
Diversity, equity and inclusion (prioritizes minority hiring, has a diverse employee base, culturally inclusive in-flight experiences, supports minority suppliers)	5.5	8.5

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

RICE | BUSINESS

Hotels

Customers of hotels provided the importance of the value drivers shown in the figure below. The top two value drivers were:

- Room quality

- Cost/affordability

The least important drivers were:

- Sustainability/carbon impact

- Diversity, equity and inclusion

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 14: Hotels
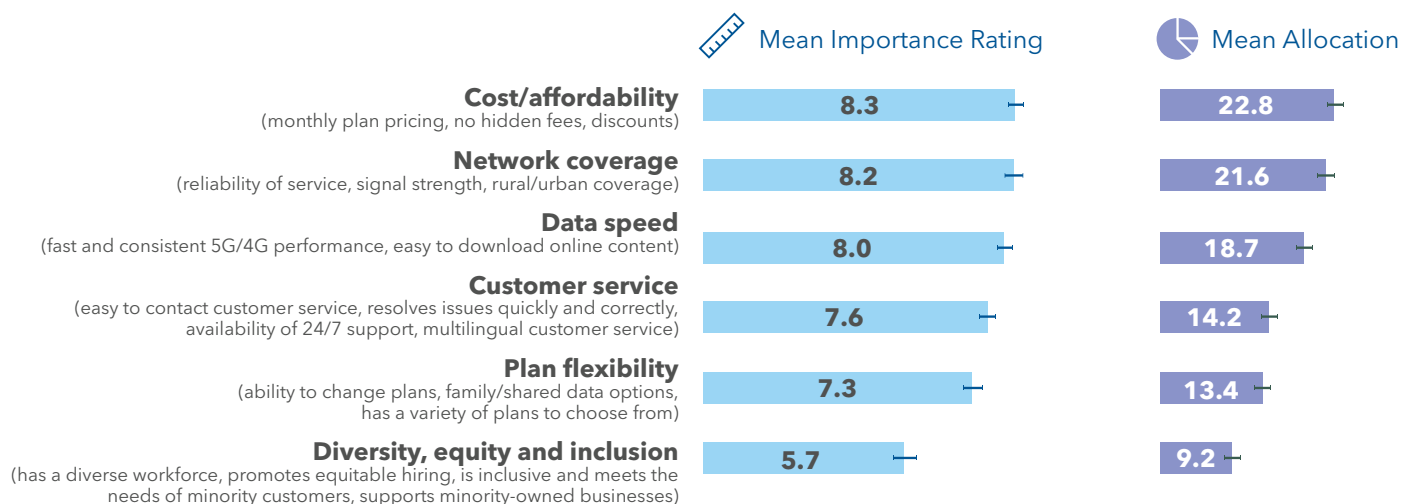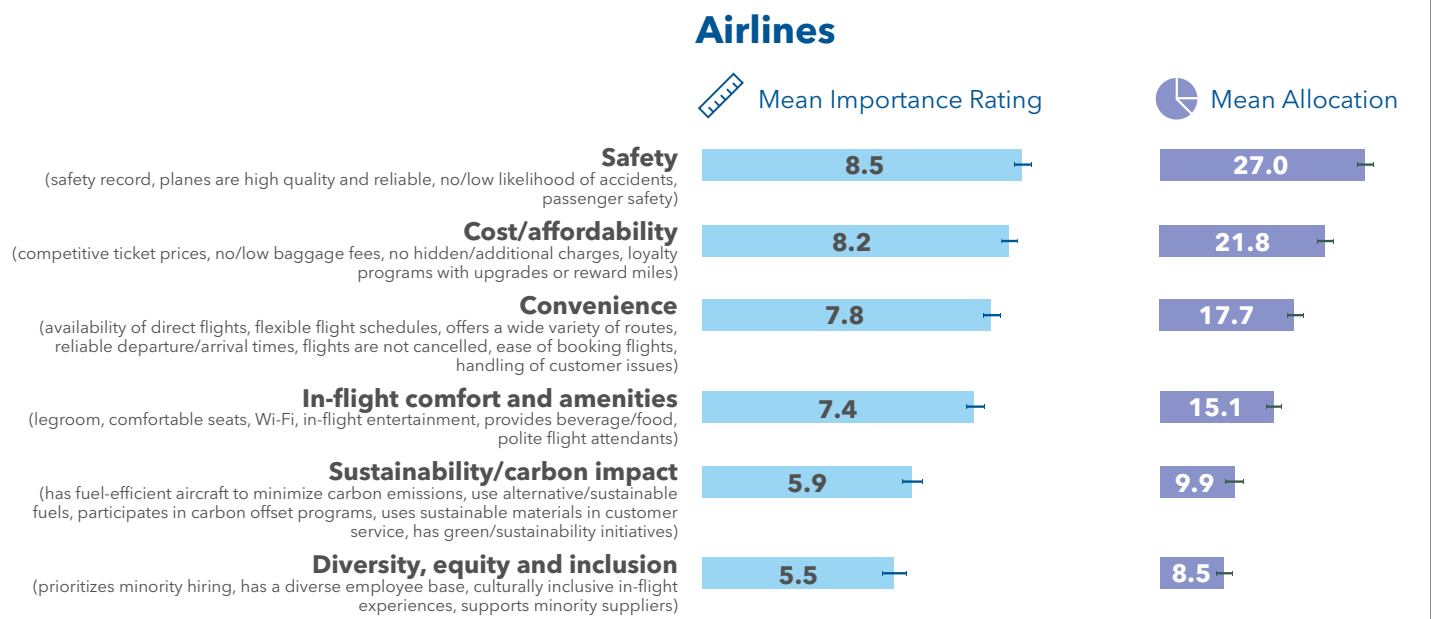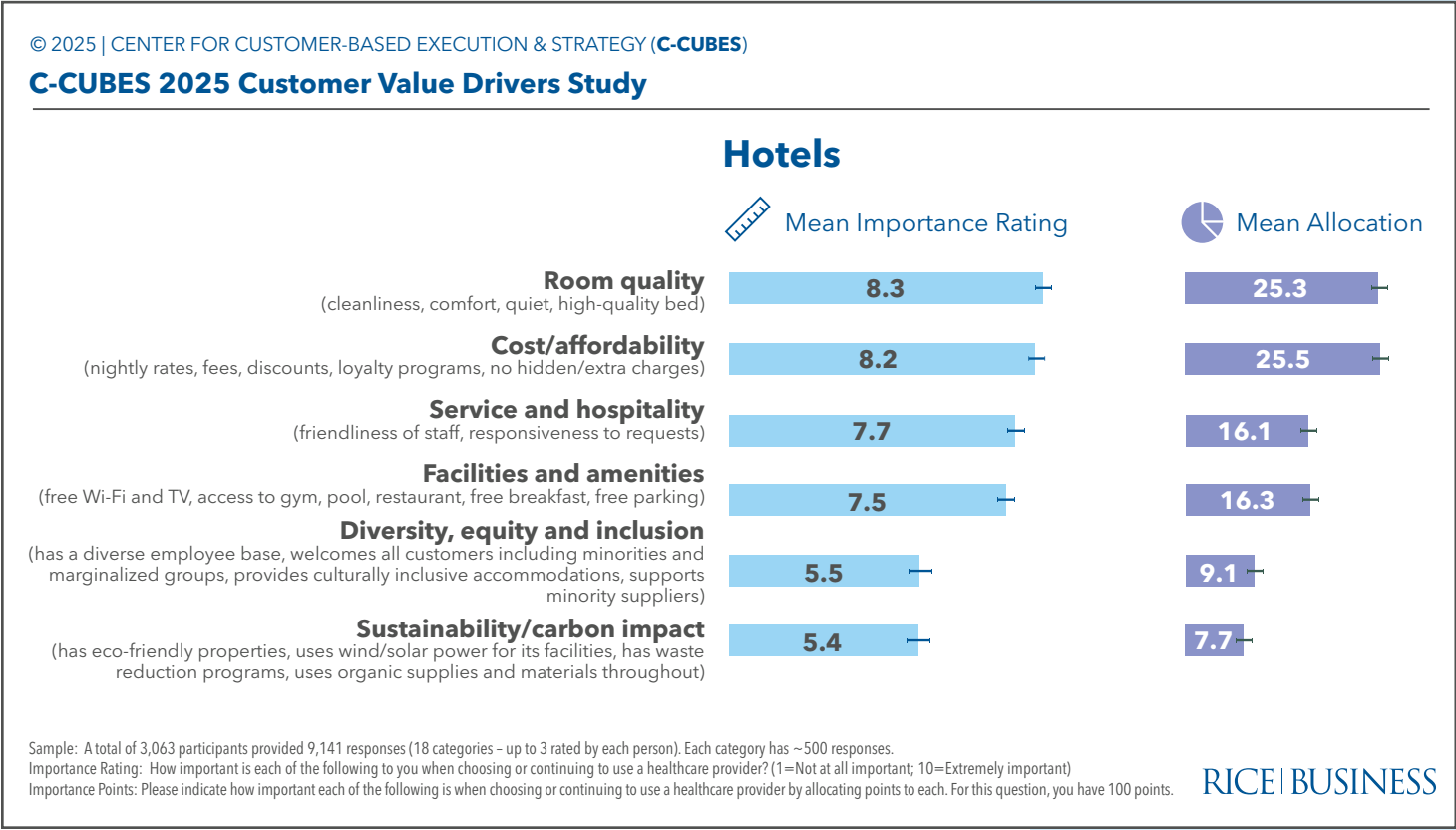
C-CUBES 2025 Customer Value Drivers Study

Hotels

	Mean Importance Rating	Mean Allocation
Room quality (cleanliness, comfort, quiet, high-quality bed)	8.3	25.3
Cost/affordability (nightly rates, fees, discounts, loyalty programs, no hidden/extra charges)	8.2	25.5
Service and hospitality (friendliness of staff, responsiveness to requests)	7.7	16.1
Facilities and amenities (free Wi-Fi and TV, access to gym, pool, restaurant, free breakfast, free parking)	7.5	16.3
Diversity, equity and inclusion (has a diverse employee base, welcomes all customers including minorities and marginalized groups, provides culturally inclusive accommodations, supports minority suppliers)	5.5	9.1
Sustainability/carbon impact (has eco-friendly properties, uses wind/solar power for its facilities, has waste reduction programs, uses organic supplies and materials throughout)	5.4	7.7

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Pharmaceutical Medicines

Customers of pharmaceutical medicines provided the importance of the value drivers shown in the figure below. The top three value drivers were:

- Effectiveness/efficacy
- Cost/affordability
- Safety

The least important drivers were:

- Diversity, equity and inclusion
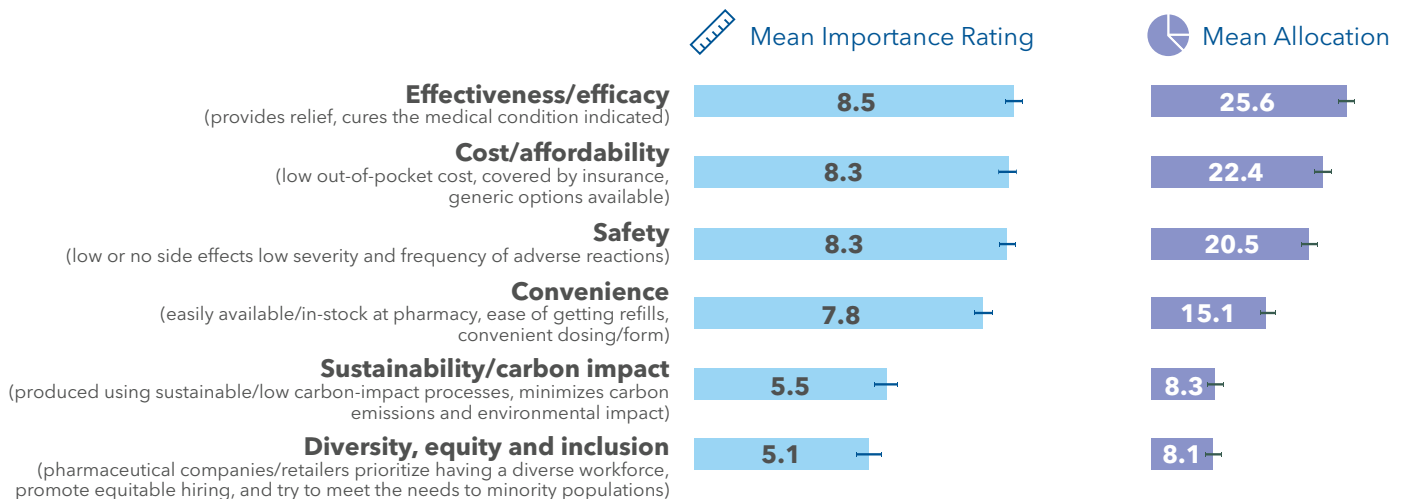- Sustainability/carbon impact

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 15: Pharmaceutical Medicines

C-CUBES 2025 Customer Value Drivers Study

Pharmaceutical Medicines

	Mean Importance Rating	Mean Allocation
Effectiveness/efficacy (provides relief, cures the medical condition indicated)	8.5	25.6
Cost/affordability (low out-of-pocket cost, covered by insurance, generic options available)	8.3	22.4
Safety (low or no side effects low severity and frequency of adverse reactions)	8.3	20.5
Convenience (easily available/in-stock at pharmacy, ease of getting refills, convenient dosing/form)	7.8	15.1
Sustainability/carbon impact (produced using sustainable/low carbon-impact processes, minimizes carbon emissions and environmental impact)	5.5	8.3
Diversity, equity and inclusion (pharmaceutical companies/retailers prioritize having a diverse workforce, promote equitable hiring, and try to meet the needs to minority populations)	5.1	8.1

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Household Power and Electricity

Customers of household power/electricity provided their importance of the value drivers shown in the figure below. The top two value drivers include:

- Reliability

- Cost/affordability

Handling outages received relatively high importance ratings, but when customers have a fixed number of points to allocate, the value driver becomes less important than reliability and cost/affordability.

The least important drivers are:

- Diversity, equity and inclusion

- Sustainability/carbon impact

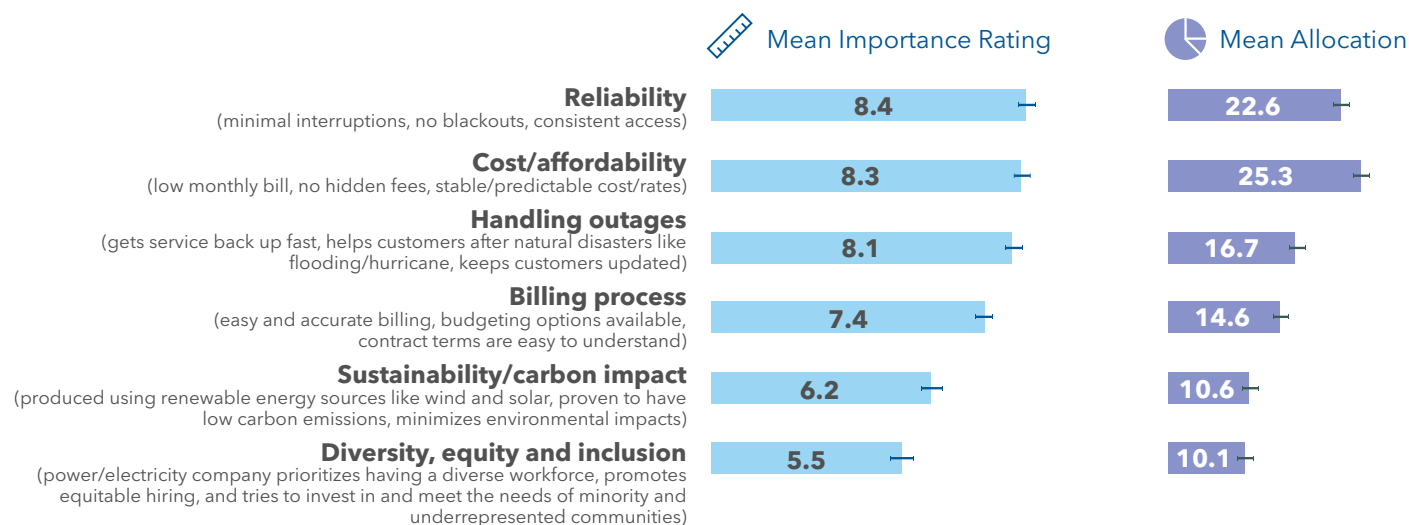The results differ between the rating scale and point allocation methodologies.

Figure 16: Household Power and Electricity

C-CUBES 2025 Customer Value Drivers Study

Household Power and Electricity

	Mean Importance Rating	Mean Allocation
Reliability (minimal interruptions, no blackouts, consistent access)	8.4	22.6
Cost/affordability (low monthly bill, no hidden fees, stable/predictable cost/rates)	8.3	25.3
Handling outages (gets service back up fast, helps customers after natural disasters like flooding/hurricane, keeps customers updated)	8.1	16.7
Billing process (easy and accurate billing, budgeting options available, contract terms are easy to understand)	7.4	14.6
Sustainability/carbon impact (produced using renewable energy sources like wind and solar, proven to have low carbon emissions, minimizes environmental impacts)	6.2	10.6
Diversity, equity and inclusion (power/electricity company prioritizes having a diverse workforce, promotes equitable hiring, and tries to invest in and meet the needs of minority and underrepresented communities)	5.5	10.1

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

RICE | BUSINESS

Residential Housing / Neighborhoods

Home buyers provided the importance of the value drivers for evaluating residential housing/neighborhoods shown in the figure below. The top two value drivers include:

- Neighborhood condition and safety
- Cost/affordability
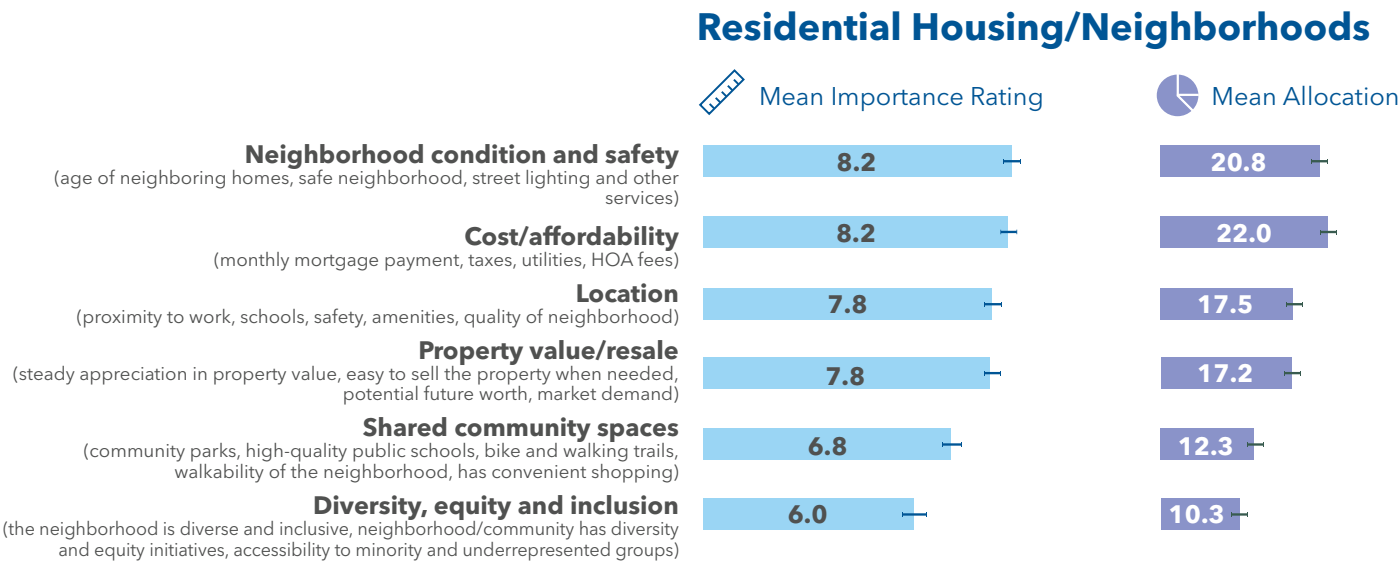
The least important drivers were:

- Diversity, equity and inclusion
- Shared community spaces

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 17: Residential Housing / Neighborhoods

C-CUBES 2025 Customer Value Drivers Study

Residential Housing/Neighborhoods

	Mean Importance Rating	Mean Allocation
Neighborhood condition and safety (age of neighboring homes, safe neighborhood, street lighting and other services)	8.2	20.8
Cost/affordability (monthly mortgage payment, taxes, utilities, HOA fees)	8.2	22.0
Location (proximity to work, schools, safety, amenities, quality of neighborhood)	7.8	17.5
Property value/resale (steady appreciation in property value, easy to sell the property when needed, potential future worth, market demand)	7.8	17.2
Shared community spaces (community parks, high-quality public schools, bike and walking trails, walkability of the neighborhood, has convenient shopping)	6.8	12.3
Diversity, equity and inclusion (the neighborhood is diverse and inclusive, neighborhood/community has diversity and equity initiatives, accessibility to minority and underrepresented groups)	6.0	10.3

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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Law Enforcement / Local Police Force

Community residents provided the importance of the value drivers considered when evaluating law enforcement, as shown in the figure below. The top two value drivers were:

- Crime prevention and safety
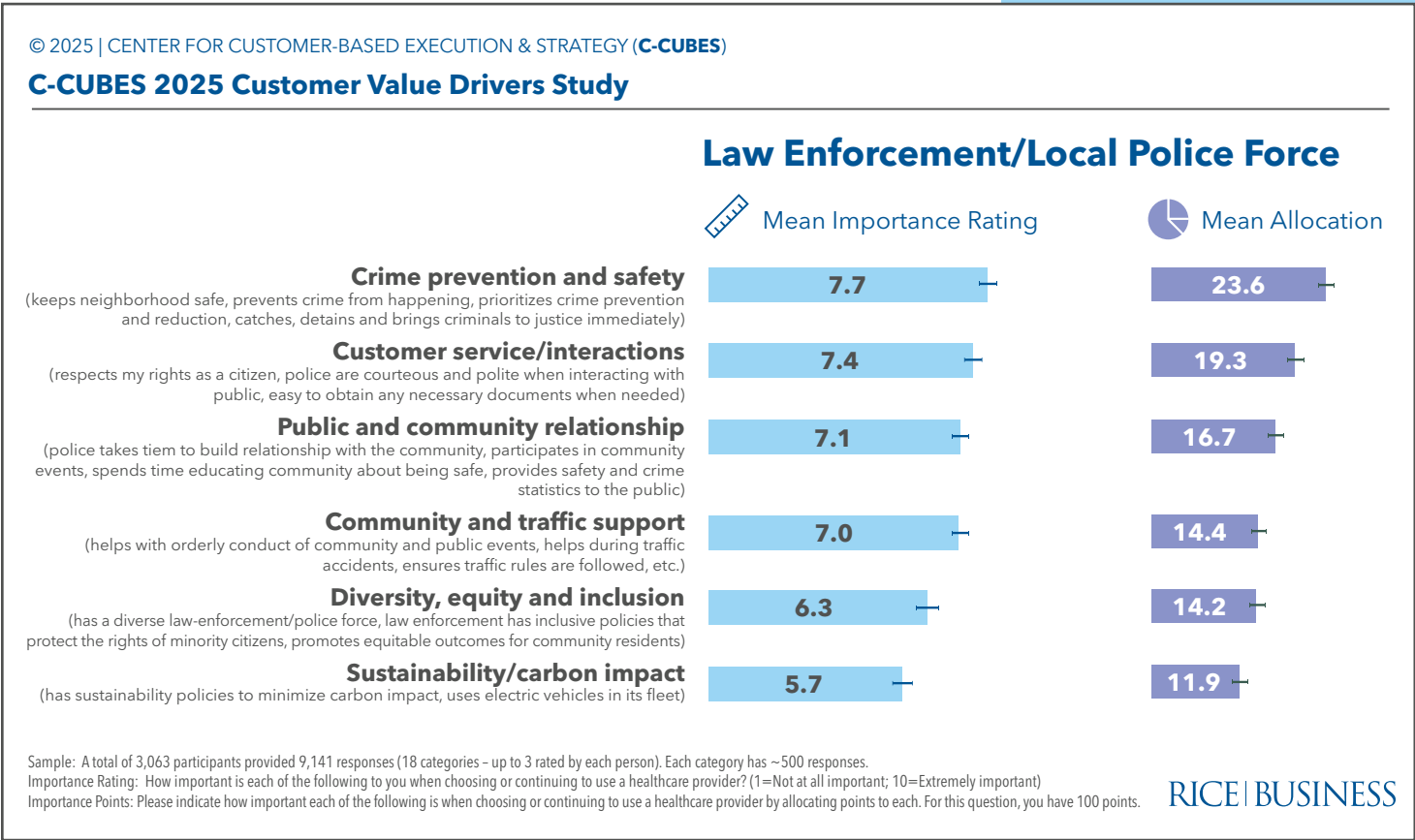- Customer service/interactions

The least important drivers were:

- Sustainability/carbon impact
- Diversity, equity and inclusion

The results are largely consistent between the rating scale and point allocation methodologies.

Figure 18: Law Enforcement / Local Police Force

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Law Enforcement/Local Police Force

	Mean Importance Rating	Mean Allocation
Crime prevention and safety (keeps neighborhood safe, prevents crime from happening, prioritizes crime prevention and reduction, catches, detains and brings criminals to justice immediately)	7.7	23.6
Customer service/interactions (respects my rights as a citizen, police are courteous and polite when interacting with public, easy to obtain any necessary documents when needed)	7.4	19.3
Public and community relationship (police takes tiem to build relationship with the community, participates in community events, spends time educating community about being safe, provides safety and crime statistics to the public)	7.1	16.7
Community and traffic support (helps with orderly conduct of community and public events, helps during traffic accidents, ensures traffic rules are followed, etc.)	7.0	14.4
Diversity, equity and inclusion (has a diverse law-enforcement/police force, law enforcement has inclusive policies that protect the rights of minority citizens, promotes equitable outcomes for community residents)	6.3	14.2
Sustainability/carbon impact (has sustainability policies to minimize carbon impact, uses electric vehicles in its fleet)	5.7	11.9

Sample: A total of 3,063 participants provided 9,141 responses (18 categories – up to 3 rated by each person). Each category has ~500 responses.
Importance Rating: How important is each of the following to you when choosing or continuing to use a healthcare provider? (1=Not at all important; 10=Extremely important)
Importance Points: Please indicate how important each of the following is when choosing or continuing to use a healthcare provider by allocating points to each. For this question, you have 100 points.

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CONCLUSION

Conclusion

Customer value is the north star of all successful enterprises, whether for- or not-for-profit. Yet, most organizations struggle to create value for customers because they lack the resources to clearly define and prioritize the drivers of customer value.

This report defines the drivers of customer value, quantifies their relative weights, and ranks the value drivers using a validated, research-based approach.

Organizations can use the report to better serve customers by focusing their resources on excelling at the highest-ranked drivers. Ultimately, a clear prioritization of value drivers not only helps customers, but also employees, who can prioritize their time and energy in the most efficient and effective manner.

About the Authors

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Dr. Tsiros has published in multiple leading journals, including the J*ournal of Marketing Research, Journal of Consumer Research, Journal of Marketing, Marketing Science, Organizational Behavior and Human Decision Processes, Journal of Retailing and Journal of the Academy of Marketing Science*. His research, which has been featured in the *Harvard Business Review* and *The Economist*, has been widely cited and has won several awards. He has served as associate editor of the J*ournal of Marketing Research* and on the Editorial Review Board for the *Journal of Marketing Research*, *Journal of Retailing* and J*ournal of Service Research*. He has consulted for several companies and served as an expert witness in trademark cases.