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Smiling Report 2026: Global study reveals a striking shift - stronger sales, weaker human connection

The latest **Smiling Report 2026**, published by **MSPA Europe/Africa** in cooperation with **Better Business Sweden**, reveals a defining shift in global customer experience:

Businesses are becoming more efficient and sales-driven but less emotionally engaging.

Now in its **22nd year of publication**, the Smiling Report builds on a unique longitudinal database of **over 33 million mystery shopping evaluations collected since 2004**, enriched with more than **600,000 additional real customer interactions in 2026 alone**.

The 2026 edition is based on one of the largest coordinated datasets in customer experience research, combining validated insights from:

- **36 countries worldwide**
- **51 professional mystery shopping companies (MSPA members)**
- **Over 650,000 customer interactions (Greeting)**
- **Over 580,000 service interactions (Smile)**
- **Over 520,000 real sales opportunities (Add-on Sales)**

All data is collected through structured mystery shopping evaluations across multiple industries, including retail, finance, automotive, hospitality, and public services. Only validated data has been included, and countries with statistically insignificant sample sizes have been excluded from ranking comparisons to ensure accuracy and comparability.

Global results: performance improves but connection declines



The 2026 results highlight a clear transformation in how customer experience is delivered:

- **Smile: 75.1%**
- **Greeting: 83.8%**
- **Add-on Sales: 64.4%**

While Greeting and Add-on Sales continue to improve, Smile shows a noticeable decline.

This reflects a critical shift: **Customer experience is becoming more standardized and commercially effective — but less human.**

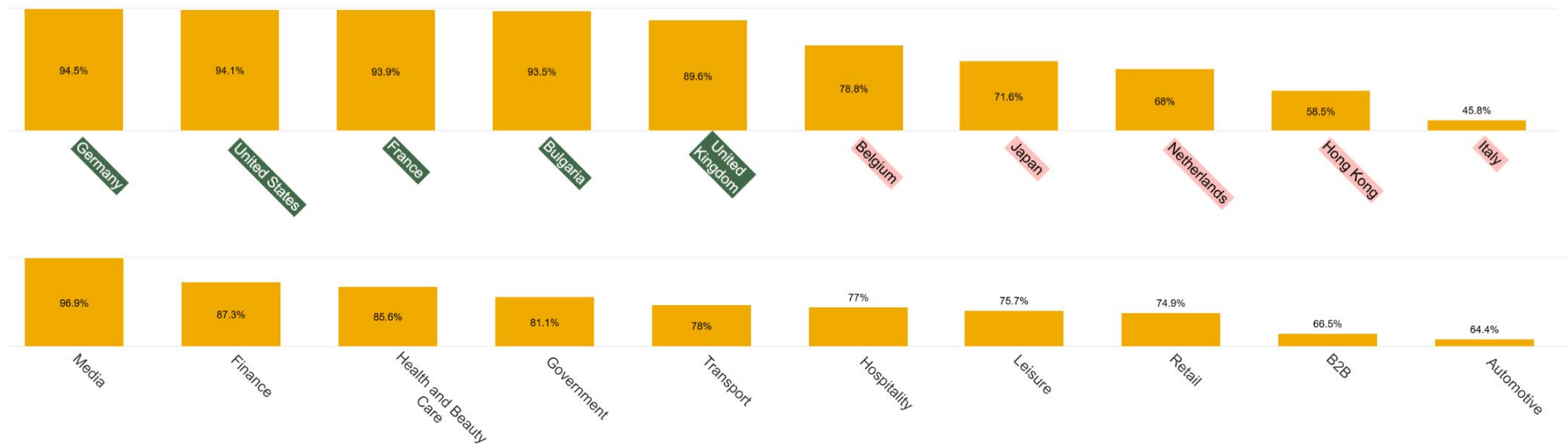
Smile: the most human KPI and the most at risk

A smile is a powerful tool that transcends language and cultural barriers, creating a positive atmosphere and fostering genuine connections. It has long been recognized as a key driver of customer satisfaction and brand perception.

In 2026, the global Smile score stands at **75.1%**, making it the most emotionally driven yet most variable metric across markets.

Among the top-performing countries are **Germany (94,5 %)**, **United States (94,1 %)**, **France (93,9 %)**, **Bulgaria (93,5 %)** and **United Kingdom (89,6 %)** demonstrating strong performance in customer-facing interactions. The variation between countries exceeds **50 percentage points**, making Smile the most inconsistent KPI in the report.

Across industries, **Media and Finance sectors** continue to demonstrate stronger performance in Smile, driven by direct customer interaction and service orientation.



Greeting: the global standard of service execution

Greeting continues to be the most consistent and standardized element of customer experience.

The first impression remains critical, and greeting continues to play a fundamental role in customer interactions. A genuine and friendly greeting sets the tone for a positive experience and builds the foundation for customer relationships.

In 2026, Greeting reaches **83.8%**, remaining the most consistent metric globally.

Top-performing countries include **Croatia (93.6 %)**, **United States (90.9 %)**, **Bulgaria (90.1%)**, **Poland (89,5 %)** and **Italy (88.1 %)** reflecting strong execution of service standards. The relatively small variation across markets confirms that Greeting is highly **trainable and process-driven**.

However, it has evolved into a baseline expectation rather than a competitive differentiator.

Industries such as **Media, Finance and B2B services** show particularly strong results, reflecting structured training and standardized service processes.



Add-on Sales: the strongest business driver and biggest opportunity

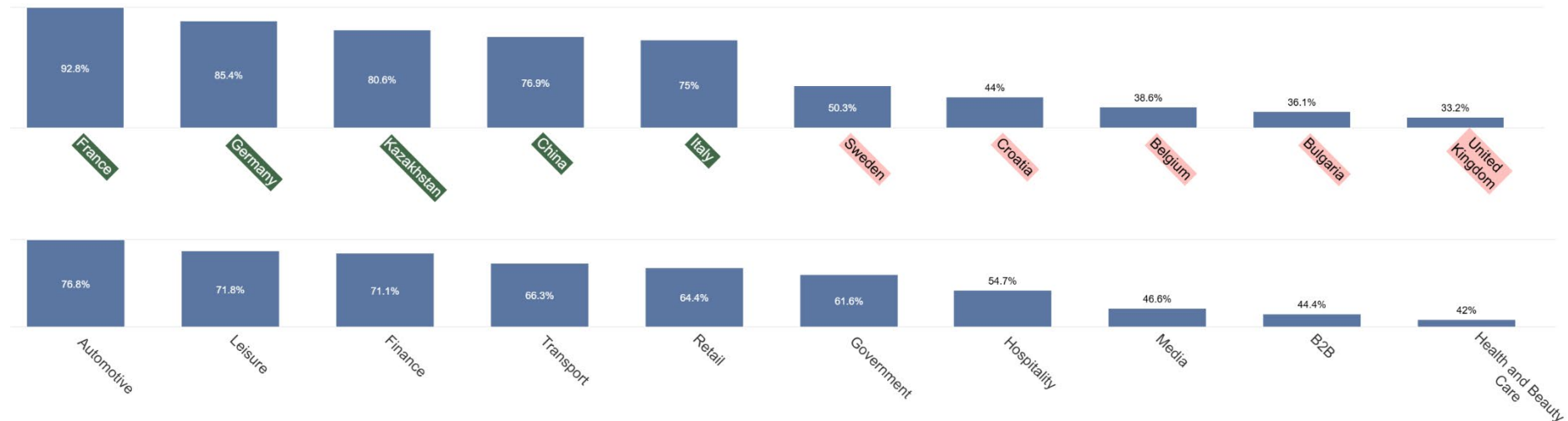
In addition to delivering positive experiences, businesses are increasingly focused on maximizing revenue opportunities. Add-on Sales represent a key link between customer experience and financial performance.

In 2026, Add-on Sales reach **64.4%**, showing continued growth and reinforcing their importance as a commercial KPI.

The highest-performing countries include **France (92.8 %)**, **Germany (85.4 %)**, **Kazakhstan (80.6 %)**, **China (76.9 %)** and **Italy (75%)** demonstrating strong alignment between service delivery and sales performance.

The gap between markets exceeds **50 percentage points**, highlighting a significant untapped opportunity for many businesses.

Industries such as **Automotive and Leisure** lead in Add-on Sales, reflecting structured sales processes and strong commercial focus.



Industry insights: different sectors, different priorities

Analysis across industries reveals clear patterns:

- **Leisure and Automotive sectors** lead in Add-on Sales, driven by structured sales processes and performance management
- **Media and Finance sectors** perform strongly in Smile and Greeting, emphasizing customer interaction and experience
- **Public and service sectors** show high consistency in Greeting, but lower emotional engagement and sales activation

Very few industries successfully combine emotional engagement and commercial performance.

The global paradox: efficiency vs emotion

The Smiling Report 2026 highlights a defining trend in modern customer experience:

“What gets trained gets delivered.

What gets measured gets sold.

But what creates connection is slowly disappearing.”

The most successful markets are not those that excel in just one metric but those that balance **experience and performance**.

Why the Smiling Report matters

The Smiling Report provides a unique global benchmark that enables businesses to:

- Identify performance gaps across markets and industries
 - Improve training and frontline performance
 - Strengthen emotional engagement with customers
 - Unlock revenue potential through better customer interactions
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Global relevance and accessibility

The Smiling Report is widely used by businesses, media, governments, and academic institutions worldwide.

Access to the data is free of charge.

We encourage voluntary contributions to our nominated charity:

👉 www.operationsmile.org

to help bring more smiles to the world.

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The data from the Smiling Report may be used in any publication, provided that MSPA Europe/Africa and Better Business Sweden are cited as the source.

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