



Fixed broadband customer experience: consumer survey



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About this report

This report uses the results of Analysys Mason's annual consumer survey to assess the behaviour, preferences and plans of fixed broadband users. The report analyses the satisfaction and churn of broadband customers and investigates the relationship between value-added services (VAS) and customer satisfaction.

The survey was conducted in association with Dynata between July and August 2023. The survey groups were chosen to be representative of the broader online consumer population in the countries covered. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents per country.

KEY QUESTIONS ANSWERED IN THIS REPORT

- How are metrics such as Net Promoter Score (NPS), customer satisfaction and intention to churn affected by consumers' fixed broadband speeds?
- What are the key drivers of churn among fixed broadband subscribers and how do these differ by speed?
- Which services do broadband consumers take as part of a bundle and how is this changing?
- What is the impact of bundling additional services on customer satisfaction?



GEOGRAPHICAL COVERAGE

- **Western Europe (WE):** France, Germany, Ireland, Italy, Norway, Spain, Sweden and the UK
- **Central and Eastern Europe (CEE):** Poland and Turkey
- **North America (NA):** Canada and the USA
- **Developed Asia-Pacific (DVAP):** Australia and New Zealand
- **Emerging Asia-Pacific (EMAP):** Malaysia
- **Africa:** South Africa



WHO SHOULD READ THIS REPORT

- Product managers and strategy teams working for fixed operators that are launching new broadband products aimed at the retail market, or operators that are designing their responses to competitors' products.
- Marketing executives and product managers for operators that are making decisions about service design and its impact on customer retention.
- Regulatory authorities and associated bodies tasked with overseeing competition in the fixed broadband market.



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Executive summary

Positioning and pricing of fibre broadband

NPS and churn





Value-added services

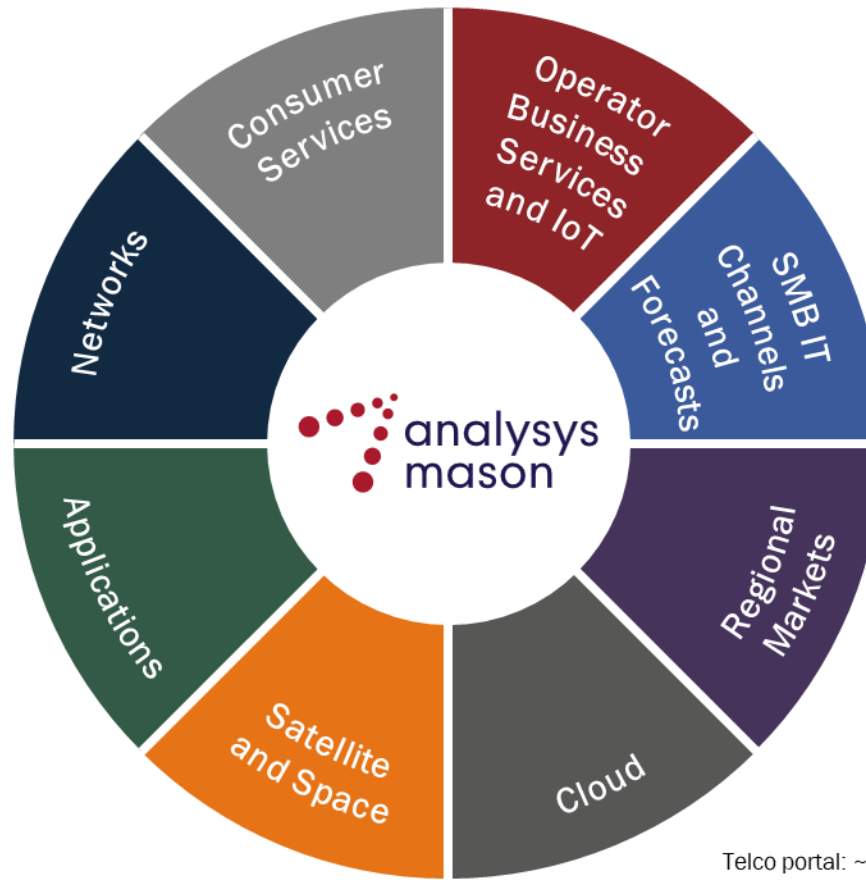
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Methodology and panel information

About the author and Analysys Mason

Our research services

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Consumer Services
 - Fixed Broadband Services
 - Mobile Services
 - Fixed-Mobile Convergence
 - Smart Devices
 - Future Comms
 - Video, Gaming and Entertainment
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Networks
 - Next-Generation Wireless Networks
 - Wireless Infrastructure Strategies
 - Fibre Infrastructure Strategies
 - Operator Investment Strategies
 - Telecoms Strategy and Forecast
 - Transport Network Strategies
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Applications
 - Network Automation and Orchestration
 - Customer Engagement
 - Monetisation Platforms
 - Digital Experience
 - Automated Assurance
 - Service Design and Orchestration
 - Telecoms Software Market Shares
- 
Satellite and Space
 - Satellite Strategies for Telcos
 - Satellite Capacity
 - Satellite Infrastructure
 - Satellite Mobility



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks
- Cyber Security



SMB IT Channels and Forecasts

- SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- Forecast data for 80 countries



Telco portal: ~2800 forecast and ~320 historical metrics
 SMB Technology Forecaster portal: ~120 000 forecast metrics

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