Sweden: consumer survey

Stephen Burton

About this report

This report provides key findings from consumer survey data from Sweden and gives an analysis at the operator level. It covers fixed broadband, mobile and pay-TV services.

The survey was conducted in association with Dynata between July and August 2022. The survey group was chosen to be representative of the mobile-internet-using population in Sweden. We set quotas on age, gender and geographical spread to that effect. There were 1000 respondents.

GEOGRAPHICAL COVERAGE

- Sweden

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the most significant factors that affect Net Promoter Scores (NPSs) for fixed broadband and mobile operators? Which operators score highly and why?
- What are the most significant drivers of fixed broadband and mobile churn and how can operators approach customer retention?
- What are the mobile and fixed broadband data usage patterns among respondents?
- What are the most popular pay-TV and video streaming services? Which services lead to high satisfaction scores and why?

WHO SHOULD READ THIS REPORT

- Strategy teams and managers who are interested in improving the customer experience within telecoms operators and understanding the drivers of customer satisfaction and churn.
- Market intelligence and regional research teams of equipment/device manufacturers that are responsible for understanding end-user trends and supporting business units in identifying and addressing new opportunities.
- Product managers and strategy teams working for telecoms operators or pay-TV providers that are interested in using streaming video services as a value-added service (VAS) to support their core services.

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Executive summary

Mobile operators in Sweden outperformed their fixed broadband counterparts in terms of Net Promoter Score (NPS) in 2022. Each sector had an extremely wide spread of NPSs.

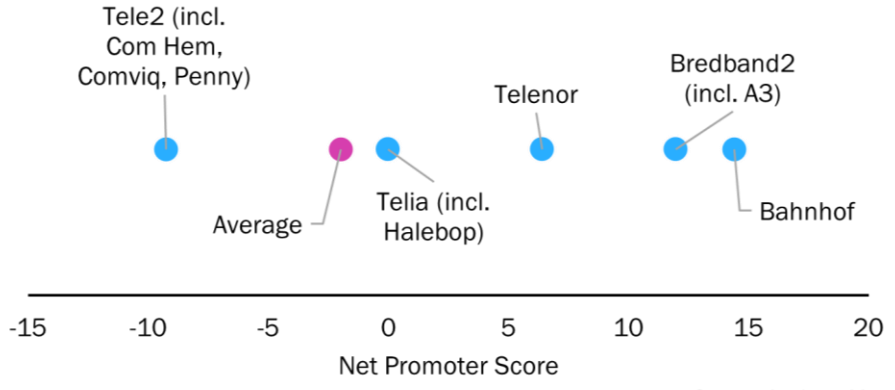
Some Swedish fixed broadband operators recorded low NPSs in 2022 due to poor customer satisfaction with many service elements, particularly price. They should work to improve their customer service and speeds in order to increase their NPSs.

Mobile operators recorded much higher NPSs than their fixed broadband counterparts due to better customer satisfaction with speed, data restrictions and price. Mobile operators should focus on improving their network coverage and customer service to avoid price competition.

KEY FINDINGS

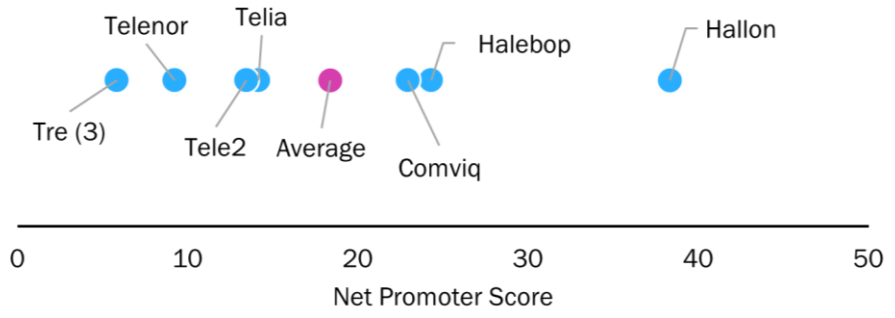
- Fixed broadband operators have low NPSs and compete on price. They should consider improving their speeds and customer service.
- Mobile operators have higher NPSs than their fixed broadband counterparts but also compete on price. They can avoid price competition by improving their network coverage and customer service and increasing their data allowances.
- Streaming services receive much higher NPSs than pay TV. Operators can bundle popular streaming services to increase revenue.

Figure 1: Net Promoter Scores for fixed broadband operators, Sweden, 2022[1]



Source: Analysys Mason

Figure 2: Net Promoter Scores for mobile operators, Sweden, 2022[1]



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[1] Net Promoter Score (NPS) is calculated by subtracting the percentage of subscribers that rated the operator 6 or below from the percentage that rated it 9 or 10. Please refer to the methodology and panel information section for the sample size and relevant survey questions. The averages for both Figure 1 and Figure 2 include other operators that are not individually displayed.

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About the author

Stephen Burton (Research Analyst) is a Research Analyst in the London office. He joined Analysys Mason after graduating from Durham University with an MA in international relations.

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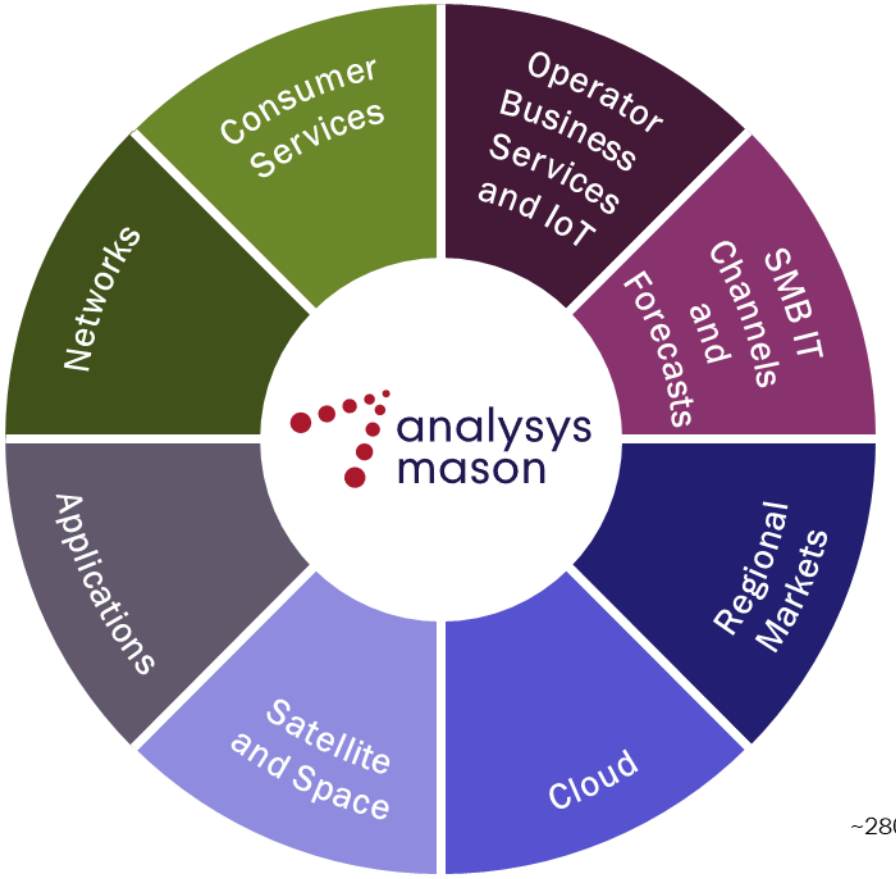

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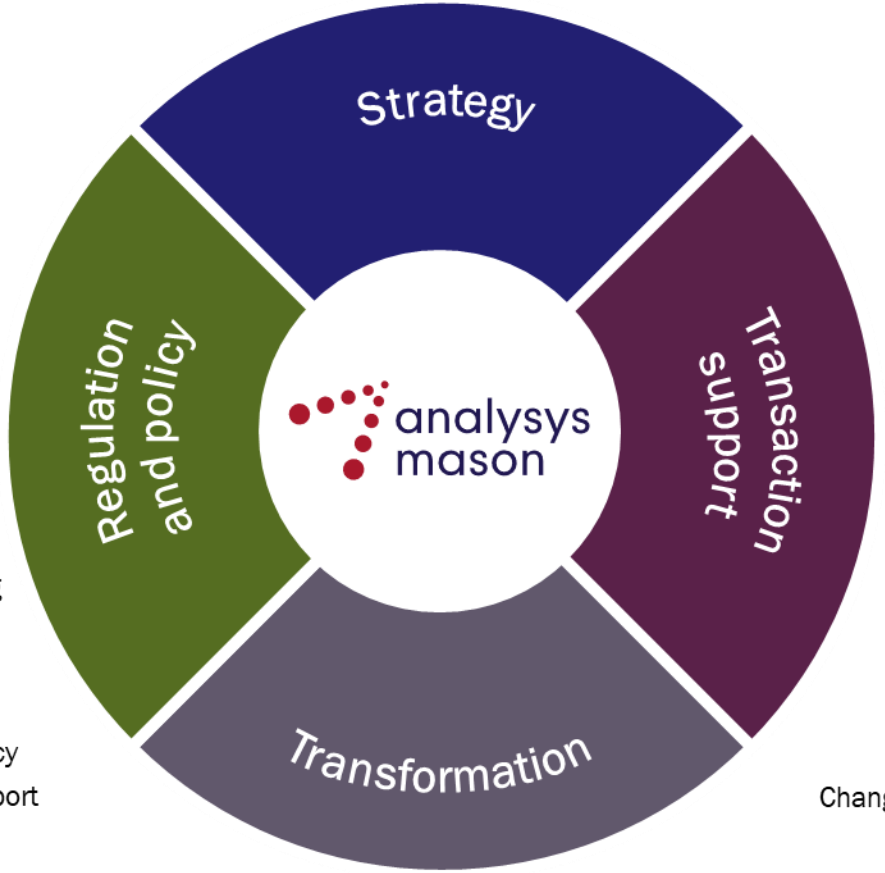

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