



# Germany: consumer survey



Stephen Burton

## About this report

This report provides key findings from consumer survey data from Germany 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 Germany. We set quotas on age, gender and geographical spread to that effect. There were almost 1000 respondents.



### GEOGRAPHICAL COVERAGE

- Germany

### 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.

## Executive summary

Challenger operators' mobile NPSs were higher than those for established providers in Germany in 2022. The NPS for all fixed broadband operators increased in 2022. Telekom Deutschland had the highest NPS of any German operator, thanks to improved customer service and reliability. Customer satisfaction and NPS for both the fixed and mobile markets was affected by price and customer service.

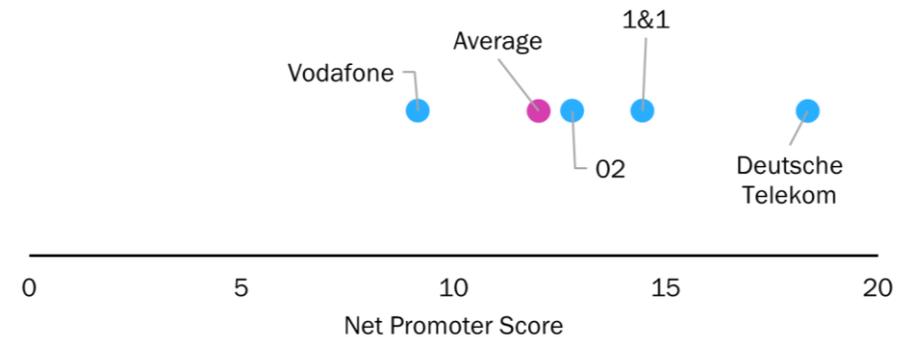
Customer satisfaction and price were cited as the main reasons for intended churn in both the mobile and fixed markets. In the mobile market, price was the key influencer on NPS. Network coverage is area in which mobile operators can address the risk of churn without resorting to price competition.



### KEY FINDINGS

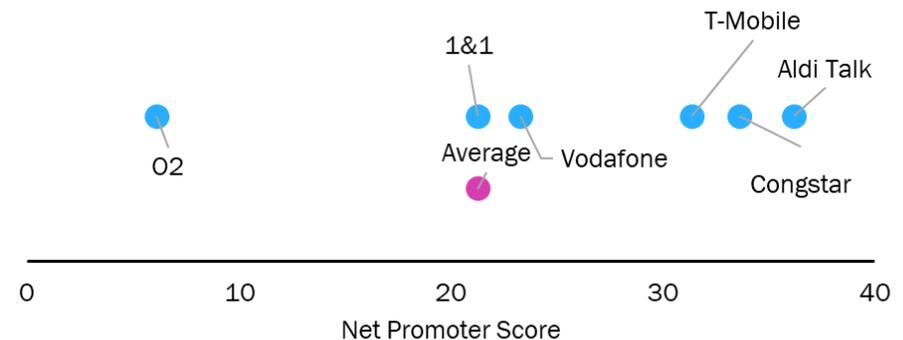
- Operators have considerable scope to improve their fixed services; our survey results show that fixed broadband NPS and customer satisfaction are significantly lower than that for mobile services.
- Mobile operators must evaluate new ways of differentiating their propositions. NPS and customer satisfaction scores are similar for all operators, which increases the likelihood of price competition.
- Streaming services outperformed pay-TV alternatives, with respondents awarding very high NPSs for most streaming packages.

Figure 1: Net Promoter Scores for fixed broadband operators, Germany, 2022<sup>1</sup>



Source: Analysys Mason

Figure 2: Net Promoter Scores for mobile operators, Germany, 2022<sup>1</sup>



Source: Analysys Mason

<sup>1</sup> 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. Average includes other operators, which are not shown individually.



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Methodology and panel information

**About the author and Analysys Mason**

## About the author



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

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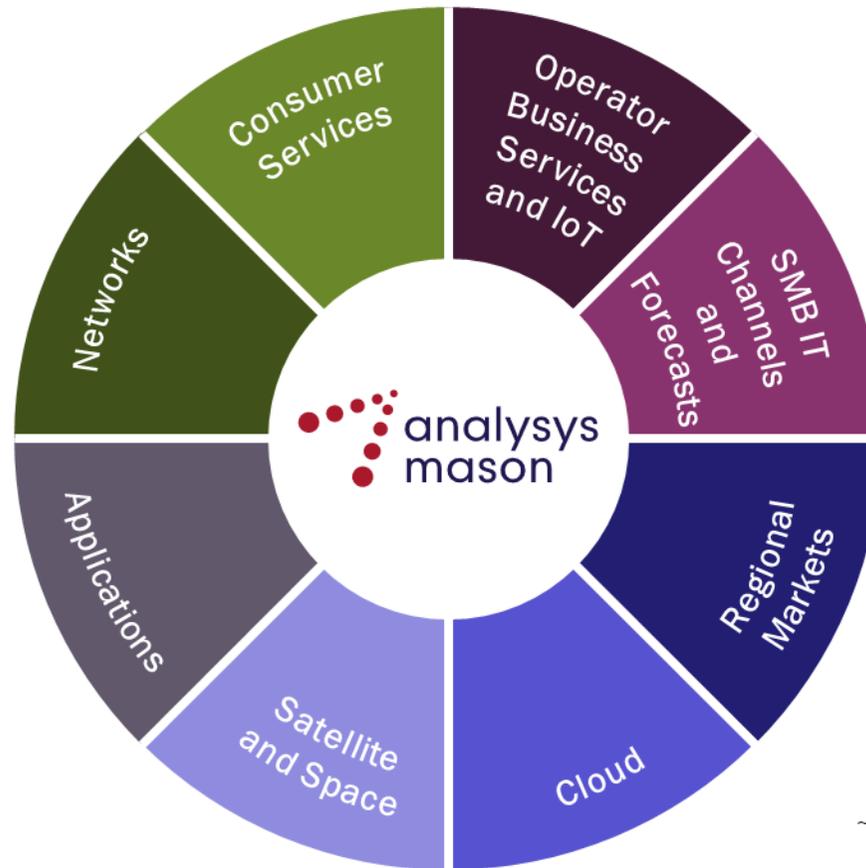
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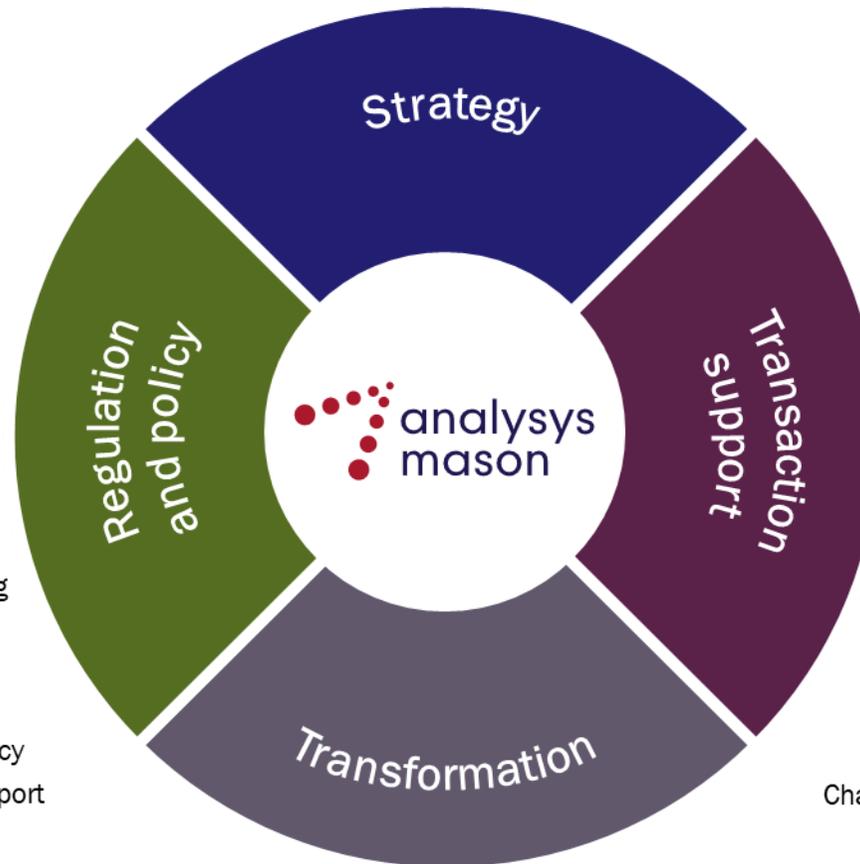
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- Infrastructure strategy



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