



Mobile customer satisfaction and experience: consumer survey



Tom Rebbeck

About this report

This report provides an analysis of the customer experience of smartphone users in a range of high- and middle-income countries. It uses consumer survey data to assess mobile customer satisfaction KPIs such as Net Promoter Score (NPS) and churn intention, as well as the impact of digital channel usage on satisfaction.

This survey was conducted in association with Dynata between July and August 2022. The survey groups were chosen to be representative of the mobile-internet-using populations of each country. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents in each country.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the drivers of mobile customer experience? How do they vary by country and by operator?
- What key factors influence consumers' intention to churn? How have consumers' priorities evolved?
- What are the Net Promoter Scores (NPSs) and key satisfaction metrics of operators? Which companies lead and why?
- What is the relationship between customer service and customer satisfaction?



GEOGRAPHICAL COVERAGE

High-income countries

- Australia
- Canada
- France
- Germany
- Ireland
- Italy
- New Zealand
- Norway
- Poland
- Spain
- Sweden
- UK
- USA

Middle-income countries

- Malaysia
- Philippines
- South Africa
- Turkey



WHO SHOULD READ THIS REPORT

- Strategy, marketing intelligence and planning teams within telecoms operators.
- Other parties interested in the take-up and impact of 5G. These include strategy and market intelligence teams in network equipment vendors and device manufacturers, as well as investors and regulators.

Executive summary

Drivers of satisfaction and churn differ between high- and middle-income countries.

Satisfaction with price is a key driver of both overall satisfaction and churn intention in high-income countries. This helps to explain why many low-cost challengers and MVNOs have high Net Promoter Scores (NPSs) and low churn risks. This is not an especially positive result for operators, though it should be noted that customer service and coverage satisfaction are similarly important to NPS, giving operators options beyond lowering their prices.

Coverage is critical for both satisfaction and churn in middle-income countries. This is good news for bigger players that tend to have network advantages.

Self-care app use is linked with increased customer satisfaction.

Self-care app use can lead to increased satisfaction, particularly if the apps are multi-functional and easily navigable. Operators should think about enriching their self-care apps; this could relieve pressure on contact centres, the use of which does not drive satisfaction, despite the high usage levels. Operators should not neglect traditional channels though; the top-performing players for customer service tend to offer omnichannel customer service experiences.

Figure 1: Correlation between a 1-point increase in satisfaction with various aspects of mobile services and NPS, high- and middle-income countries, 2022¹

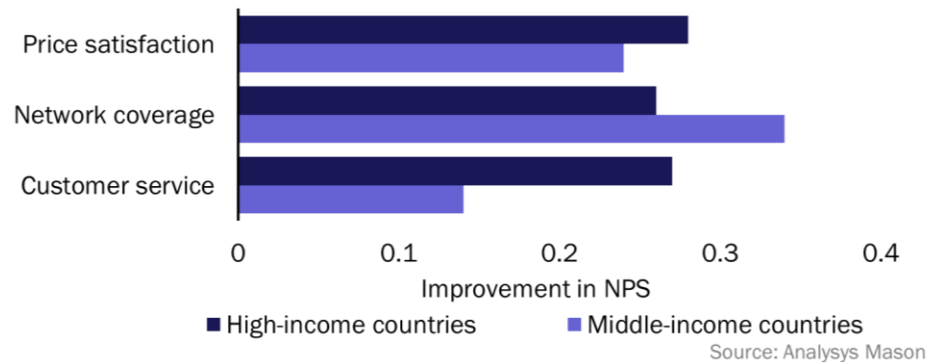
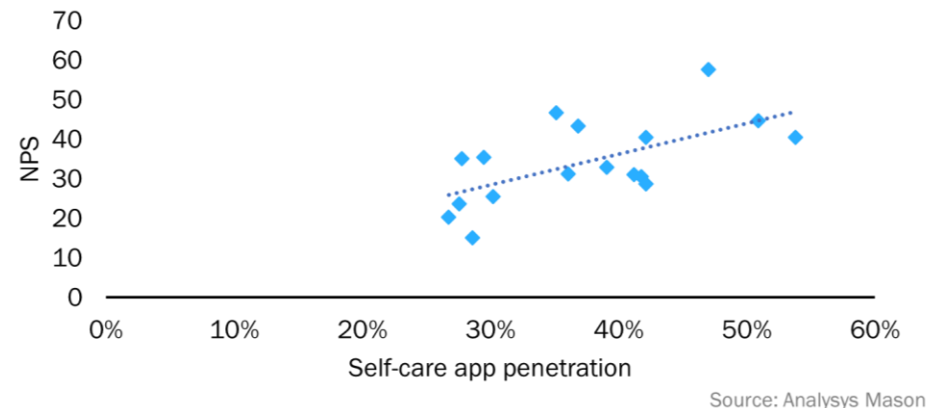


Figure 2: Self-care app penetration and NPS by country, high- and middle-income countries, 2022¹



¹ Please refer to the methodology and panel information section for the sample size and relevant survey questions.



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About the author



Tom Rebbeck (Partner) leads Analysys Mason's *Operator Business Services and IoT* research practice drawing on more than 20 years of experience in the telecoms sector. He is based in our London office, but works for clients worldwide. Tom is a specialist on the Internet of Things (IoT) and other enterprise services and has written widely on the role for operators as telecoms markets develop. As well as published research, he has worked on projects for a range of clients – including operators, regulators, industry bodies and vendors. Many of these projects have been supported by original research, such as expert interviews and customer surveys.

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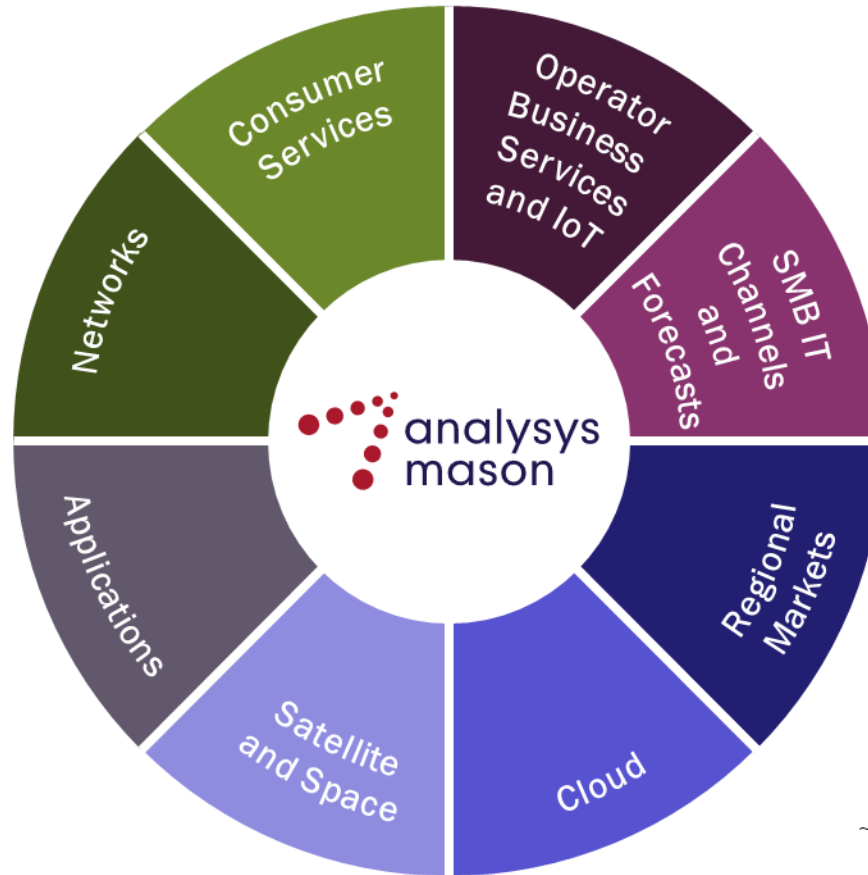
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 - European Core Forecasts
 - European Telecoms Market Matrix
 - European Country Reports
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 - Regional results and worldwide totals
 - Operator historical data

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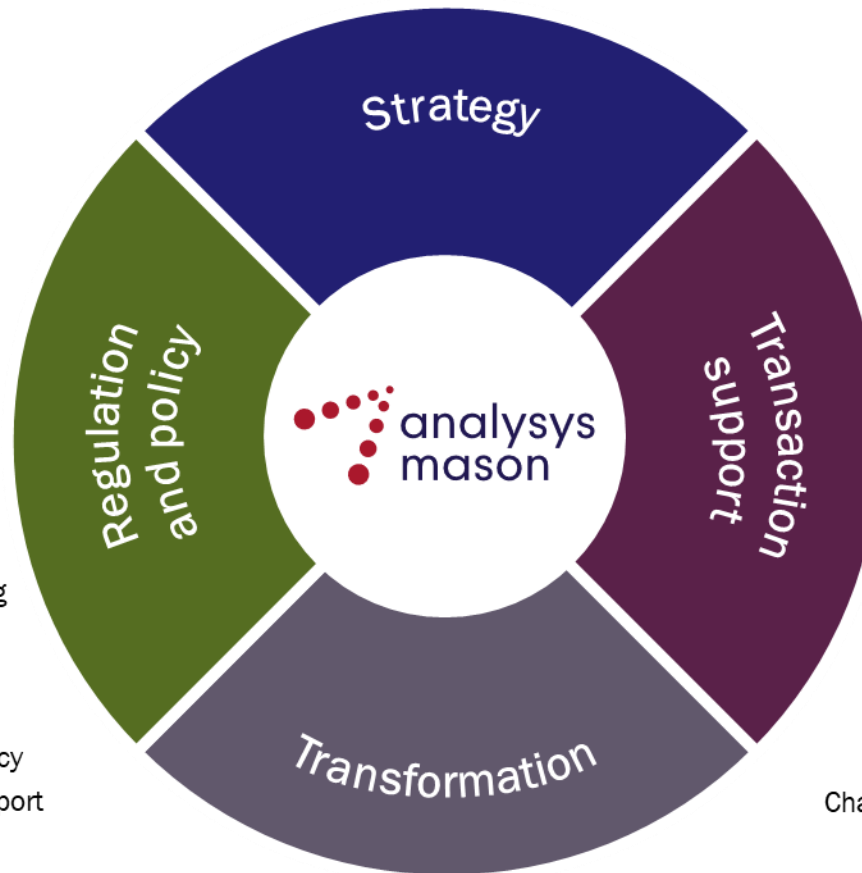
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

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