



# 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.



# Contents



## Executive summary

Drivers of churn and satisfaction

Customer experience

Appendix

Methodology and panel information

About the author and Analysys Mason

# Our research services



## Consumer Services

- Fixed Broadband Services
- Mobile Services
- Fixed-Mobile Convergence
- Smart Devices
- Future Comms
- Video, Gaming and Entertainment
- Digital Services



## Networks

- Next-Generation Wireless Networks
- Wireless Infrastructure Strategies
- Fibre Infrastructure Strategies
- Operator Investment Strategies
- Telecoms Strategy and Forecast
- Transport Network Strategies



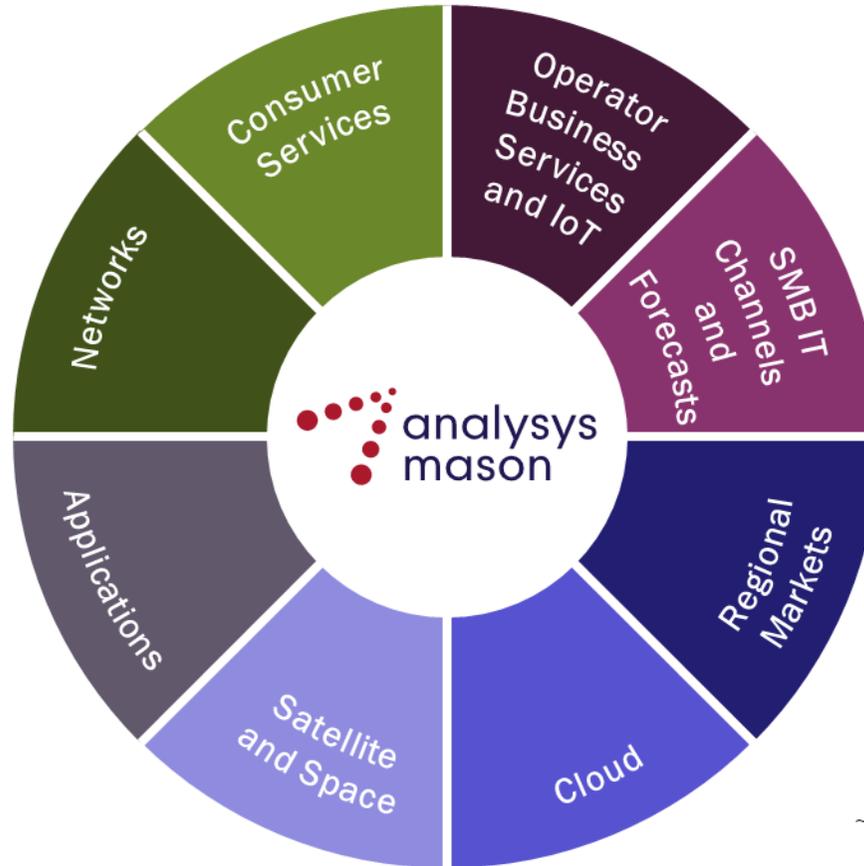
## Applications

- Network Automation and Orchestration
- Customer Engagement
- Monetisation Platforms
- Digital Experience
- Automated Assurance
- Service Design and Orchestration
- Telecoms Software Market Shares



## Satellite and Space

- Satellite Communications
- Space Applications and Infrastructure



## Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



## SMB IT Channels and Forecasts

- Cyber Security
- 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

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



[analysismason.com/what-we-do/practices/research](https://analysismason.com/what-we-do/practices/research)

PUBLISHED BY ANALYSYS MASON LIMITED IN **JANUARY 2023**

**Analysys Mason Limited.** Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.

We have used reasonable care and skill to prepare this publication and are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided “as is”, with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

We reserve the rights to all intellectual property in this publication. This publication, or any part of it, may not be reproduced, redistributed or republished without our prior written consent, nor may any reference be made to Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2023.