



Kundenmonitor Deutschland 2010: Customers increasingly sensitive to value for money

At present the price/performance ratio perceived by the customer has a particularly strong influence on satisfaction with companies' products and services - that is the key finding of the Kundenmonitor Deutschland [Customer Satisfaction Monitor Germany] 2010.

Munich, 9 September 2010 – The published Kundenmonitor Deutschland long-term study shows the increasing importance of the price/performance ratio in customers' rating in the majority of the 30 industries examined. In particular, customers of car repair shops, booksellers, gas suppliers, Internet providers and mobile service providers reward good value for money with increasing satisfaction ratings. Consumers feel that gas and electricity suppliers still have the most catching-up to do despite considerable improvements. With petrol station shops, the already low values have fallen further despite positive general trends.

"Many companies still gear their concepts for raising customer satisfaction too much to having an edge on prices. On the other hand, customers are often concerned less about the lowest prices and more about excellent performance at a reasonable price", Matthias Metje, the study leader, remarks on the current development. "So the champions of overall satisfaction are frequently at the top of their industry in the price/performance ratio perceived by customers".

This is already the 19th year of the Kundenmonitor Deutschland published by ServiceBarometer as a research institute in Munich. For the 2010 study, some 32,000 customers were surveyed about their satisfaction with numerous companies. The industry set evaluated covers a broad service spectrum in Germany. The study encompasses companies that meet everyday demand, such as trading firms, financial service providers or energy suppliers as well as new service sectors that are becoming more and more important in everyday life. That means that Internet providers, e-mail providers, online contact networks and sectors with growing customer shares like the (online) mail-order business and mail-order pharmacies are also included in the study.

Practically every trade sector studied has managed to further increase its customers' satisfaction this year, being led by the food markets up five base points to a satisfaction level of 2.30 (the average score on a scale of "totally satisfied" = 1 to "dissatisfied" = 5). The previous top scores for opticians with an average of 1.92 and pharmacies with an average of 2.01 have been maintained again.

Among financial service providers only investment companies managed to gain a clear increase, up 13 base points to a score of 2.76. They experienced a drop in satisfaction levels in the crisis years of 2008/2009 and are currently once more succeeding in impressing customers with their services.

Gas and electricity suppliers have also managed to make up for previous losses in customer satisfaction with improved ratings, which is mainly due to an increase in satisfaction with prices. The feature of mobile service providers is a constant increase in customer perception over the years. In particular the information on products and services offered and the tariffs available have resulted in a rise in overall satisfaction by a clear seven base points to a new average of 2.17. As regards airlines, customers are rewarding the safety standards of the aircraft more – with further important service aspects on board, this has produced an increase of five base points to the present satisfaction level of 2.22.

Industries gaining importance by the spread of the internet are rated differently by their customers: the mail-order business for books, medicines and clothing that operates predominantly online is at the top of a comparison of sectors, scoring primarily with a satisfaction-boosting price/performance ratio and a reliable, complete delivery service.

More and more, increasing ratings with regard to price/performance ratio resulting from a greater scope of performance are producing greater overall satisfaction with Internet providers, too: five base points up they now have a satisfaction scoring of 2.32, but still behind the ratings for e-mail providers with a clearly better average of 2.06.

This year the members of online contact networks are considerably more disappointed by their communities. Whereas last year with a satisfaction score of 2.35 the networks were in the mid-range in the industry comparison, in 2010 they have slipped by 18 base points to a figure of 2.53. That puts them on the satisfaction level of public service providers – which, along with investment companies, traditionally bring up the rear in service ranking.

The aim of publishing the Kundenmonitor Deutschland is to point up to the companies studied customer perception of the quality of their services through independent customer ratings. Besides significant indicators of service aspects, the detailed results for individual companies also indicate current records as benchmarks for further developing customer orientation.

You can download the press folder on the Kundenmonitor Deutschland 2010, more information and the service profile of individual sectors from the www.kundenmonitor.de study Website.

Press contact:

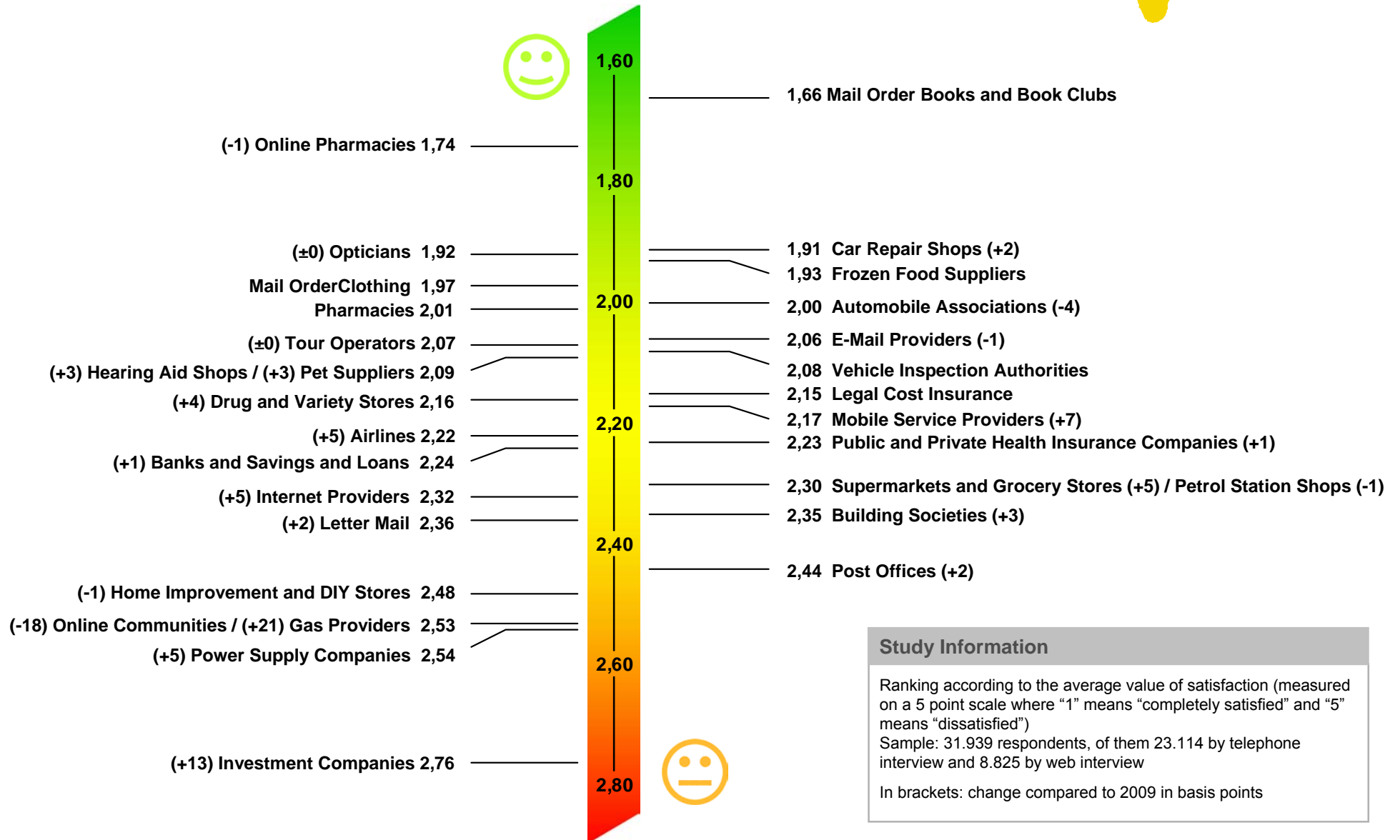
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ServiceBarometer AG – Research assignment

The *ServiceBarometer AG* team of researchers furnishes data gathered on a representative basis relating to customer satisfaction and customer loyalty in Germany. Kundenmonitor Deutschland's benchmarking database with time series for the customer orientation of companies from more than 80 industries is a reliable source for scientific and company-specific analyses. Numerous companies use the results of this independent market study to draw a comparison with competitors, to identify deficiencies in performance and risks as well as input for their own system of performance indicators.

www.servicebarometer.de

Customer Satisfaction in Germany 2010



Study Information

Ranking according to the average value of satisfaction (measured on a 5 point scale where "1" means "completely satisfied" and "5" means "dissatisfied")

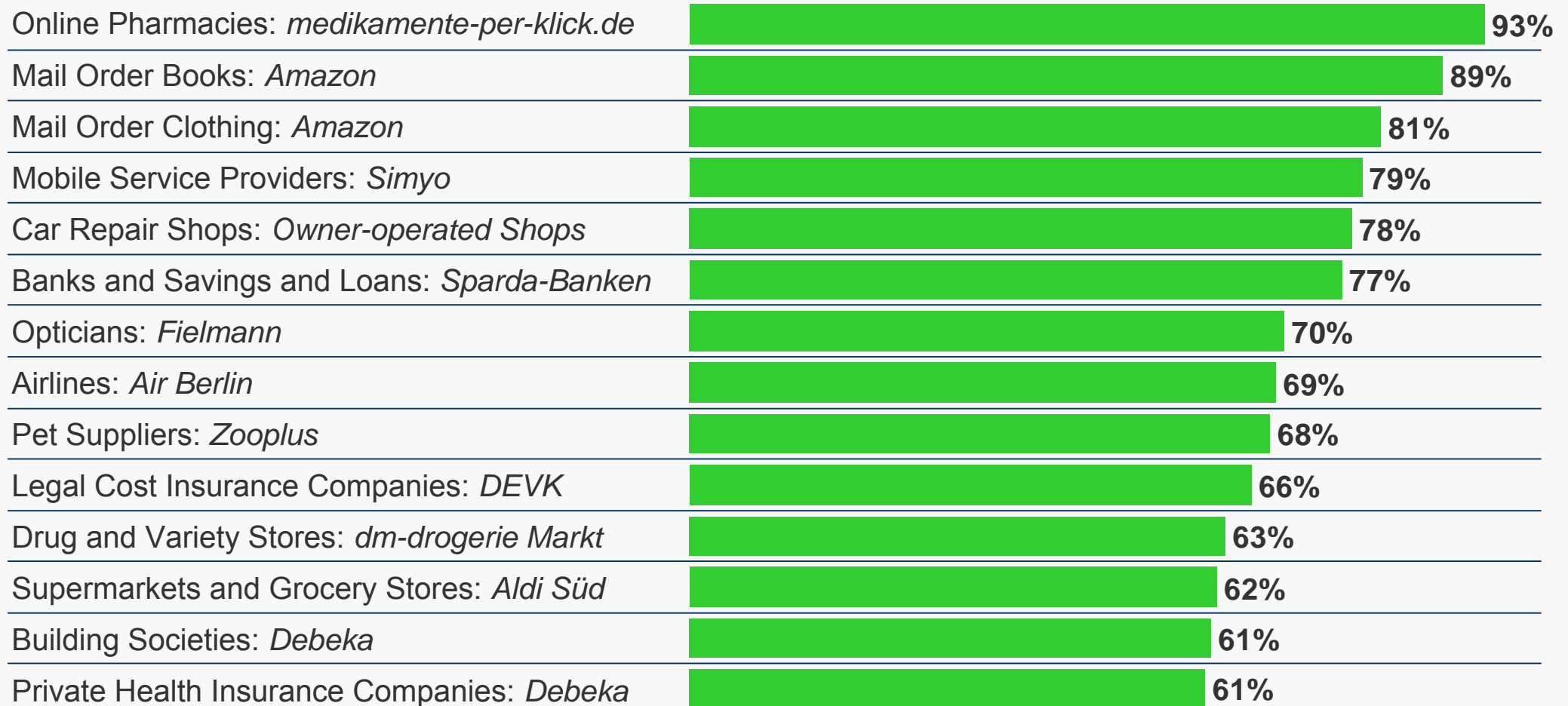
Sample: 31.939 respondents, of them 23.114 by telephone interview and 8.825 by web interview

In brackets: change compared to 2009 in basis points

Value for Money: Top-Scores of Selected Industries



Shares of delighted customers („completely satisfied“ or „very satisfied“)



Companies listed with at least 100 customer ratings and a share of more than 60 percent delighted customers in value for money.