



# Study Description 2010



			2,21	2,64
			1,96	3,49
			3,01	2,90
2,66			3,68	
	1,77	2,23	2,90	
2,94			2,54	
		3,04	2,12	
	2,14	2,80	3,25	
1,88			2,10	2,05
	2,70	1,93	2,10	2,05
3,07			2,62	
		2,37	2,29	2,51
2,81			1,77	
			3,78	
	2,37	2,64	2,63	
	1,68	3,49	1,96	1,98
	1,97	2,33	1,96	1,98
1,96			2,52	2,12
			3,29	2,63
3,01			2,10	
		3,01	2,51	3,51
3,04			3,52	
			1,89	
			2,64	1,97
			3,19	
			2,87	
			3,16	
			2,50	3,52
			3,53	3,68
			1,81	
			3,51	

# Survey Objectives and Applications of the Results



The Kundenmonitor® Deutschland (Customer Satisfaction Monitor Germany) focuses on different aspects of customer satisfaction and the quality of customer relations as well as their influence on customer retention.

## Survey Objectives:

- Pointing out top performances for benchmarking within and across industries
- Assessment of risks and sales potentials
- Revealing customer perception in different quality attributes for service providers to adjust their offers, processes and results quickly and flexibly
- Providing representative data on customer orientation for managers in marketing, sales, controlling and quality management
- Enhancement of customer satisfaction and customer retention in Germany in order to improve competitiveness

## Possible Applications of the Results:

- Identifying the status-quo of customer satisfaction and retention in your own company
- Comparison of your company's results with those of your competitors to find out how customers perceive your competitive position (time series)
- Long-term monitoring of the industry and the development of your company's results in customer satisfaction and retention
- Exposure of strengths and weaknesses for customer orientation in your company
- Selection of the “industry's top performers“ in order to learn from them
- Selection of the “functional top performers“ (e.g. telephone service, friendliness of staff) in order to learn from them
- Establishment of measures for strengthening customer relations
- Controlling the success of measures for a systematic improvement of customer orientation
- Basis for target agreements and Balanced Scorecard
- Communication measures (annual reports, advertising, information for employees)
- Comparison with your company's internal studies on customer satisfaction and retention

# Questions and Scales



Questions asked in the Kundenmonitor Germany survey are based on a 5-point scale:

For questions concerning customer satisfaction the categories used are: “completely satisfied”, “very satisfied”, “satisfied”, “less satisfied” and “dissatisfied”.

For questions on agreement (e.g. customer retention) the categories are: “certainly”, “probably” “maybe” “probably not” and “certainly not”.

The questions refer to the supplier/provider most used by the customer.

The customer receives ...



## Questions on General Indicators:

### Overall Satisfaction:

„How satisfied are you with the service of your most used supplier in general? Are you completely satisfied, very satisfied, satisfied, less satisfied or dissatisfied?“

### Value for Money:

„If you compare the price with the overall services provided: How satisfied are you with this supplier in terms of value for money?“

**Intention to Recommend:** „Will you recommend this supplier to friends or acquaintances?“

**Rebuying Intention:** „If required, will you request the services of this supplier again?“

**Competitive Advantages of Supplier:** „Does the questioned supplier offer any advantages over other suppliers?“

**Complaint Rate:** „Within the last 12 months, did you file a complaint with this provider?“

**Complaint Satisfaction:** „How satisfied were you with the handling of your complaint in general?“

# Industries Examined in 2010



## Automotive, Travel and Transportation

- Automobile Associations (1.001 CATI)
- Car Repair Shops (3.438 CAWI)
- Airlines (1.752 CAWI)
- Vehicle Inspection Authorities (1.234 CATI)
- Tour Operators (2.018 CATI)

## Retail

- Pharmacies (643 CAWI)
- Home Improvement and DIY Stores (5.952 CATI)
- Bookstores (mail-order) and Book Clubs (2.118 CAWI)
- Drug and Variety Stores (4.090 CATI)
- Pet Suppliers (1.874 CAWI)
- Hearing Aid Shops (759 CATI)
- Supermarkets and Grocery Stores (10.258 CATI)
- Opticians (1.015 CATI)
- Petrol Station Shops (1.778 CAWI)
- Frozen Food Suppliers (615 CAWI)
- Online Pharmacies (2.461 CAWI)
- Mail Order Companies (clothing)\*\* (2.632 CAWI)

## Financial Services

- Banks and Savings and Loans (5.042 CATI)
- Building Societies (3.699 CATI)
- Investment Companies (1.815 CATI)
- Public and Private Health Insurance Companies (9.474 CATI)
- Legal Cost Insurance Companies (3.614 CAWI)

## Infrastructure and Logistics

- Letter Mail\* (866 CATI)
- Gas Providers (1.673 CAWI)
- Internet Providers (2.861 CAWI)
- Mobile Service Providers (2.616 CAWI)
- Post Offices\* (6.151 CATI)
- Power Supply Companies (5.473 CATI)

## Other Services

- E-Mail Providers (2.099 CAWI)
- Online Communities (1.486 CAWI)

In brackets: number of interviews conducted, CATI = Computer Assisted Telephone Interview, CAWI = Computer Assisted Web Interview

\* Industry examined exclusively for certain clients. Results are only accessible to them.

\*\* Short questionnaire was used.

# Study Design 2010



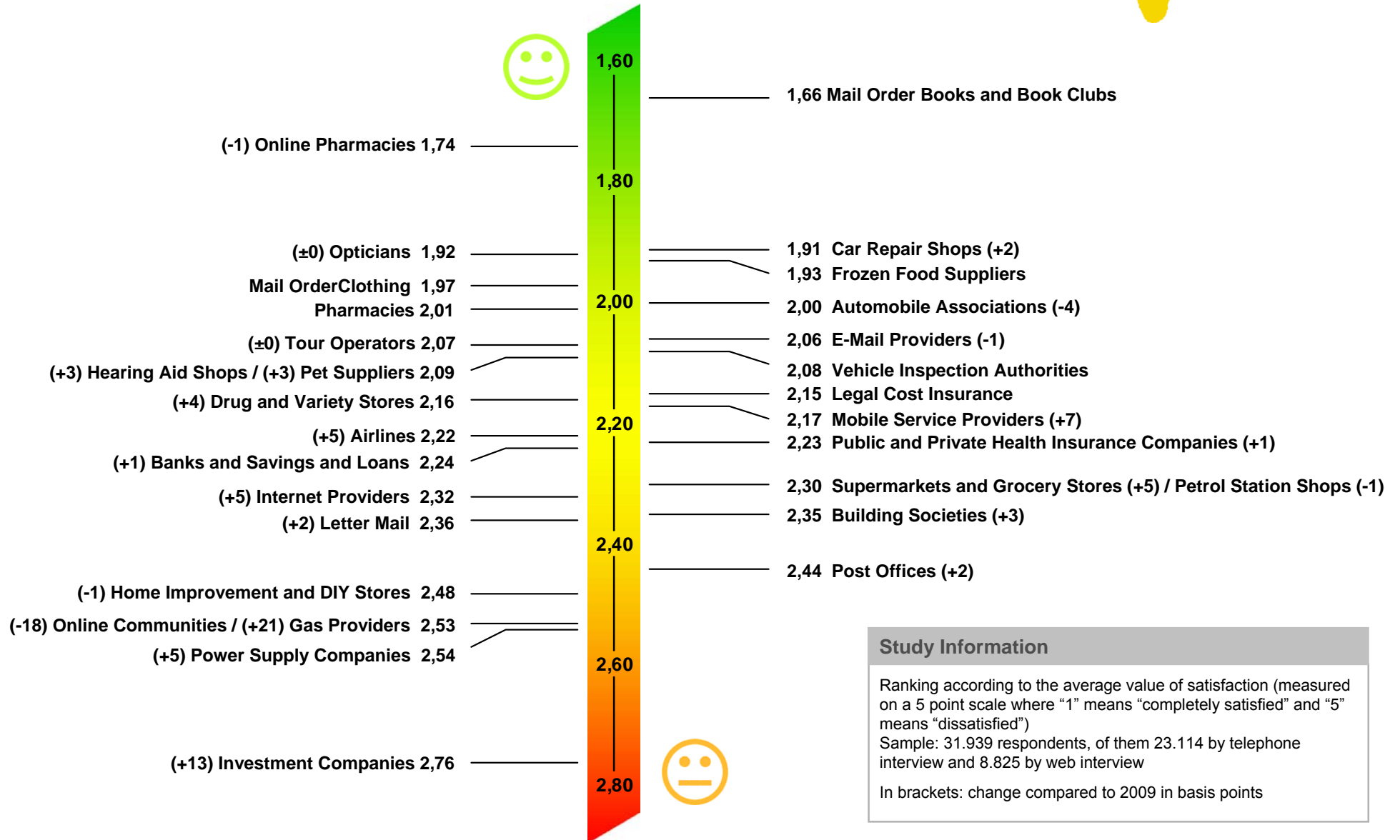
## CATI

## CAWI

<b>Sampling</b>	The overall sample includes 23.114 telephone interviews, conducted by ADM standards.	The overall sample includes 8.825 web interviews. Quota sampling was used according to age and gender. The sample was based on online panels.
<b>Universe</b>	The sample is representative of the German population aged 16 years or older.	Basis for quota sampling and weighting: German population aged between 16 and 69 years.
<b>Survey period</b>	1 September 2009 - 6 August 2010	11 May - 31 May 2010
<b>Industries examined</b>	15 industries	15 industries

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# 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

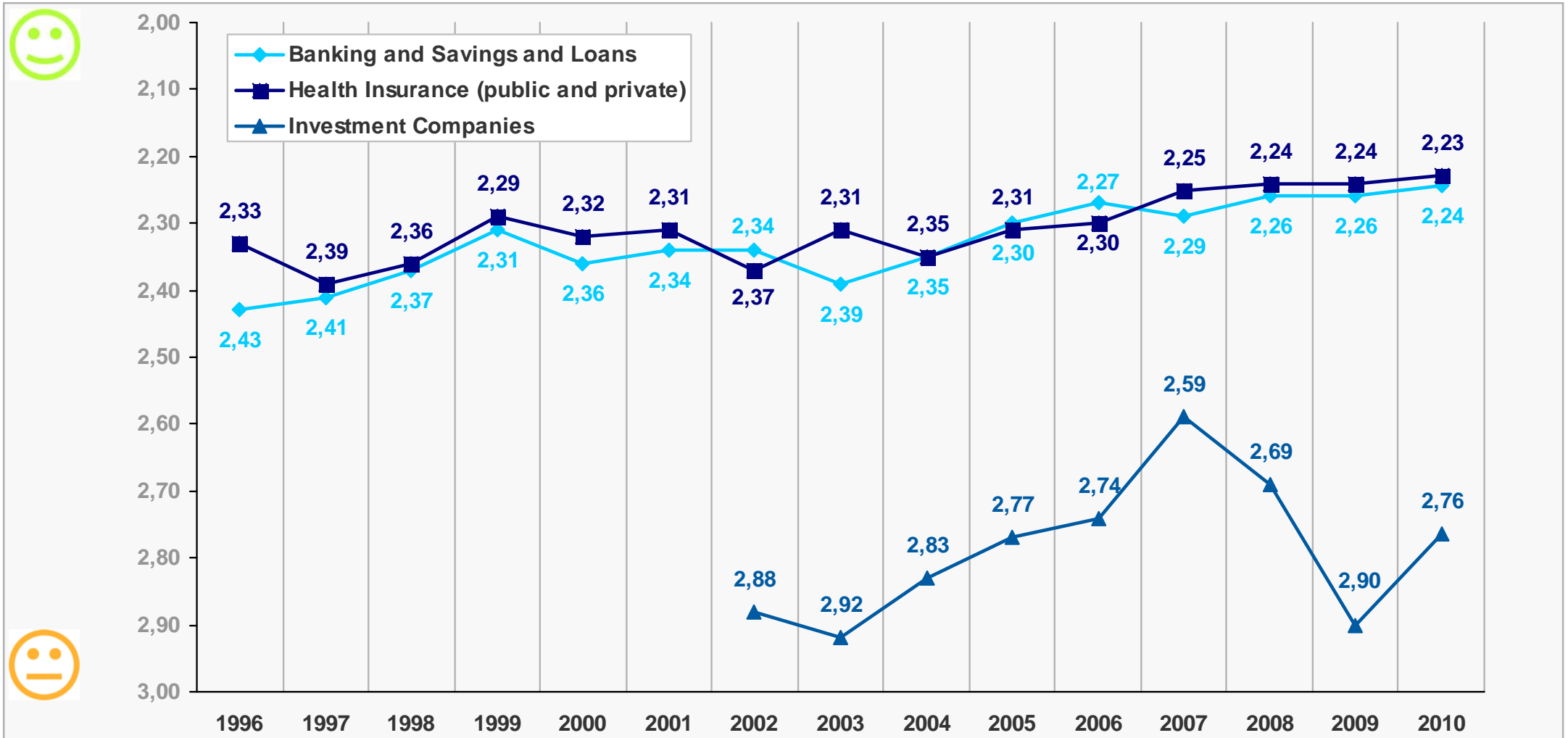
# Top Performances in Customer Satisfaction 2010



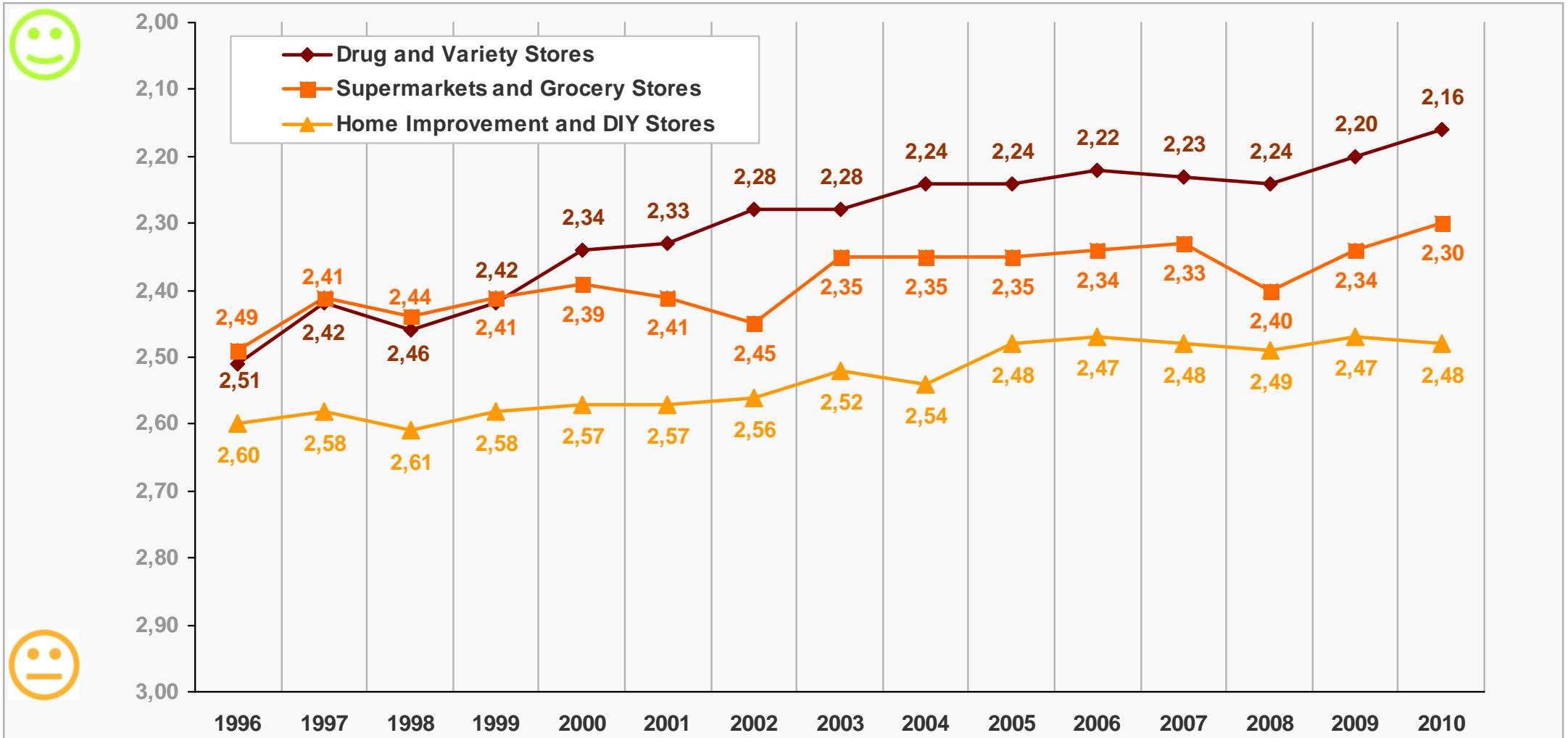
- Amazon (Mail Order Books) (1,44)
- medikamente-per-klick.de (1,49)
- Amazon, (Mail Order Clothing) (1,53)
- apotal.de (1,59)
- Google Mail (1,62)
- Apo-Discounter (1,66)
- Simyo (1,72)
- Doc Morris (1,73)
- GTÜ (Vehicle Inspection Authorities) (1,73)
- buecher.de (1,74)
- Zooplus (1,74)
- Aldi Talk (1,76)
- Toyota Car Repair Shops (1,77)
- Sanicare (1,80)
- Tchibo (Mail Order Clothing) (1,82)
- Weltbild (1,87)
- Shop-Apotheke (1,87)
- Sparda-Banken (1,88)
- Bofrost (1,89)
- BMW Car Repair Shops (1,89)
- Hotmail (1,91)
- DEVK Rechtsschutz (1,92)
- ADAC Rechtsschutz (1,92)
- Lichtblick (1,93)
- SBK (1,93)
- Yahoo Mail (1,93)
- Debeka Krankenversicherung (1,94)
- dm-drogerie Markt (1,95)
- Fielmann (1,96)
- BKK Mobil Oil (1,98)
- Techniker Krankenkasse (1,98)
- Thalia (Mail Order Books) (1,99)

Companies listed with at least 100 customer ratings and an average value better than 2,00 in overall satisfaction

# Overall Satisfaction with Selected Financial Services



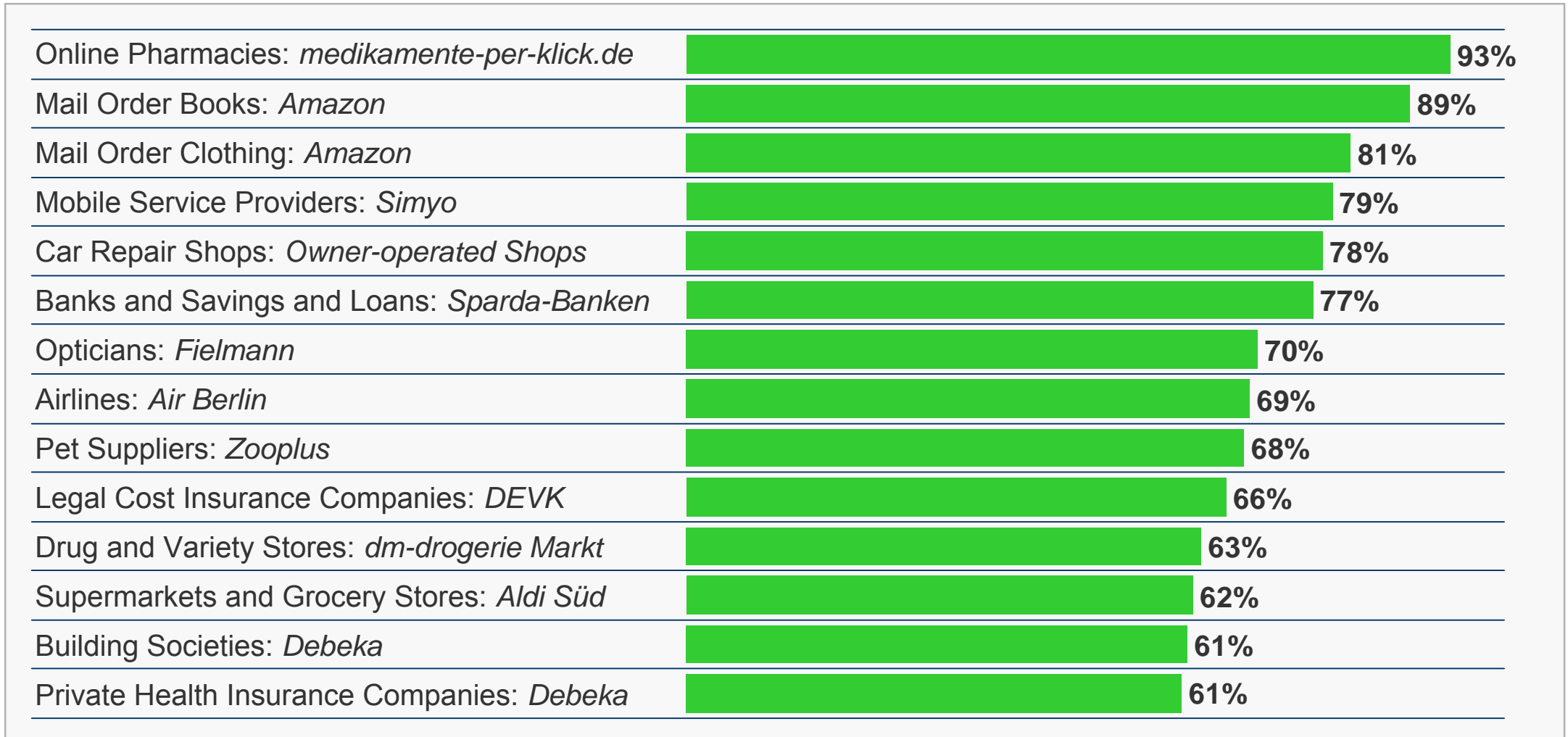
# Overall Satisfaction with Selected Retail Industries



# 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.

# Publisher



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## Company Profile:

- Research and consulting company specialising in the improvement of customer orientation
- Implementation of large customer barometers following both a cross-industry and company-specific approach
- Development of marketing and quality measures to strengthen customer relations

## Services:

- Supporting our customers in designing and implementing satisfaction research tools
- Implementation of expert interviews and focus groups
- Coordinating field services for telephone interviewing (briefing, quality management, sampling, timing, etc...)
- Conducting paper-and-pencil surveys (designing/printing the questionnaire, acquisition and digitisation of data)
- Implementation of online research (questionnaire and web programming, editorial maintenance of the website)
- Analysing and reporting data (consulting included)
- Short-term reporting to various research entities (brands, countries, branches) - monthly or quarter-wise
- Presentation of results for staff and management
- Support for in-house communication of the results (project websites, ...)
- Establishment of management-information processes
- Establishment of benchmarking processes, development of best-practice examples
- Development of measures for strengthening customer orientation and expanding sales