



# Telecommunications

## Net Promoter Benchmark Report

Business to Business  
2015



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# 1 Business to Business Relationship Net Promoter® Benchmarks

Net Promoter® is both a loyalty metric and a discipline for using customer feedback to fuel profitable growth. Developed by Satmetrix, Bain & Company, and Fred Reichheld, the concept was first popularized through Reichheld's book *The Ultimate Question*, and has since been embraced by leading companies worldwide as the standard for measuring and improving customer loyalty.

The Net Promoter Score, or NPS®, is calculated by placing a company's customers into three categories: Promoters, Passives, and Detractors. Customers are asked one key loyalty question: How likely is it that you would recommend [Company X or Brand X] to a friend or colleague? Customers respond on a 0-to-10 point rating scale, with 0 being not at all likely, and 10 being extremely likely to recommend. Responses are categorized as follows:

- Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

To calculate a Net Promoter Score, take the percentage of customers who are Promoters and subtract the percentage who are Detractors. The resulting NPS can provide insight on competitive position among companies in a given industry. By understanding attributes of the customer experience that influence the recommend score and NPS, companies can make improvements to product and service design and delivery to support profitable growth.

## 1.1 About the 2015 B2B Satmetrix Net Promoter Benchmarks

The Net Promoter Benchmarks are compiled by Satmetrix, the co-developer of Net Promoter, to help practitioners compare Net Promoter Score performance to peer companies, and across geographies.

### Overall B2B Benchmarks

The 2015 Satmetrix B2B benchmarks are drawn from the responses of 484,412 individuals in from 45 countries, rating 97 companies, during calendar year 2014. The process for creating Net Promoter scores, and statistics describing the distribution of them is described below.

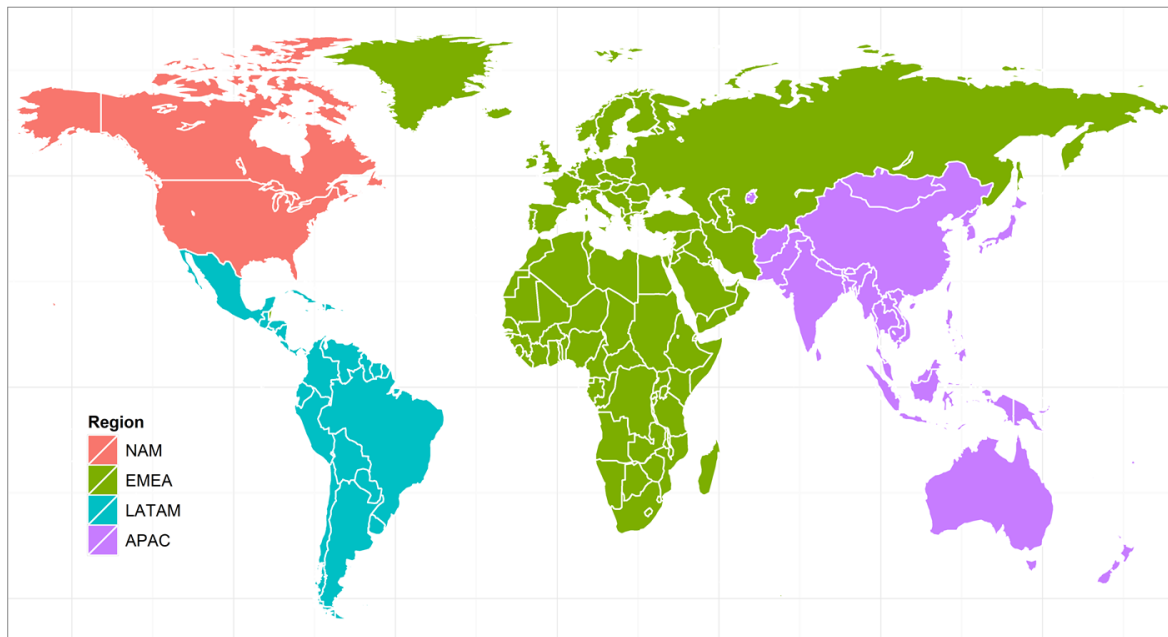
### Telecommunications B2B Benchmarks

In addition to Net Promoter benchmarks produced for companies across the entire cohort, this report contains statistics derived exclusively from the subset of 12 companies in the Telecommunications industry. The data contains 7,263 responses from 1 country.

### Supporting files

This benchmark report is supplied with supplementary files, including the statistical summaries presented in this report in Microsoft Excel format, and anonymized aggregate Net Promoter Scores provided as comma delimited text files, which can be used to create benchmarks for custom regions. See the appendix for instructions.

## Data Collection



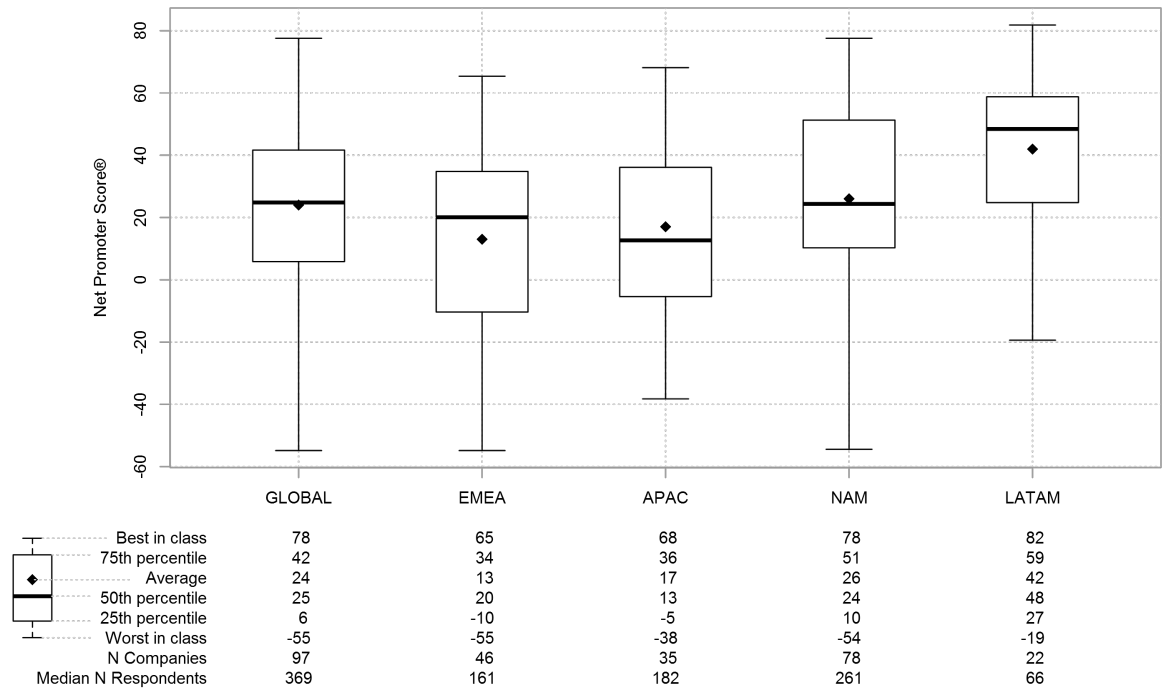
The mapping of countries and regions in the 2015 Satmetrix B2B Relationship NPS Benchmark

Data used for these business-to-business (B2B) benchmarks comes from clients participating in Satmetrix's normative research program. Data is provided by participants anonymously — names of participating companies are not revealed. For comparability, this benchmark is compiled from data which meets the following conditions:

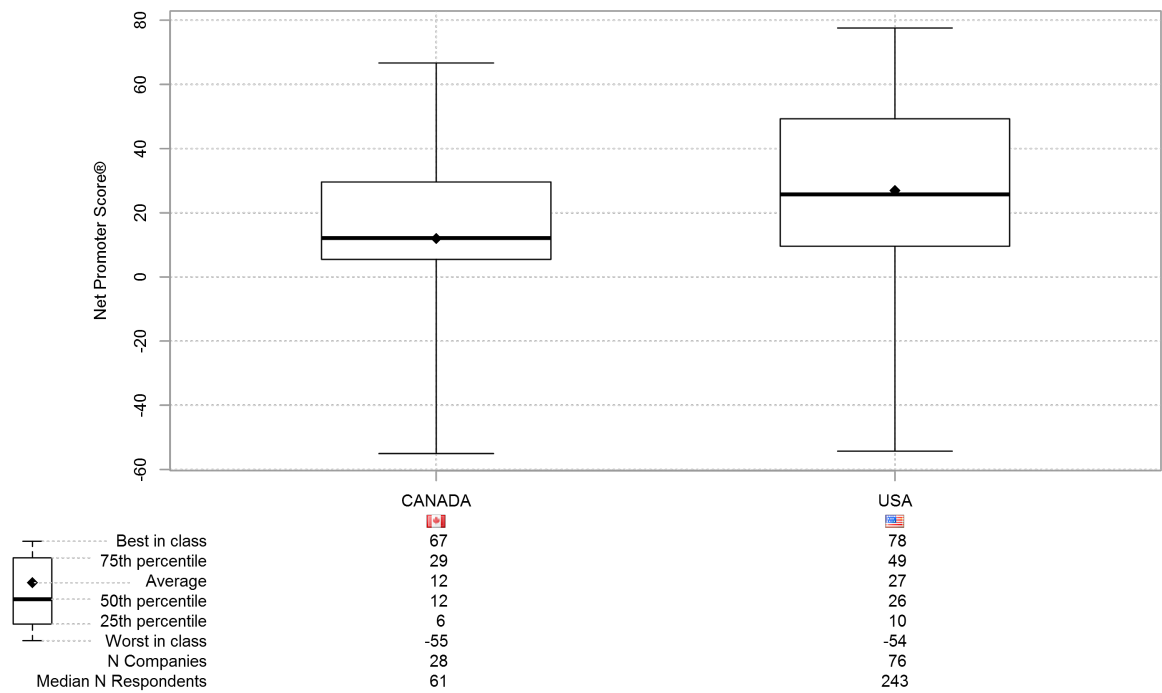
- Only data from B2B companies. For companies who operate a mixed business model, only B2B responses are included.
- Only data from *relationship* surveys is used. Relationship surveys assess the overall state of the commercial relationship, and are typically fielded at fixed intervals. This is in contrast to *transactional* surveys which are triggered by a particular event, and measure sentiment about that event (for example, support or implementation).
- Only data from Net Promoter programs that follow certain best practices are included. These include using the standard 11pt 0-10 Likert scale, recommended wording of the Likelihood to Recommend question, and the Net Promoter question being the first asked.

## 2 Overall B2B NPS

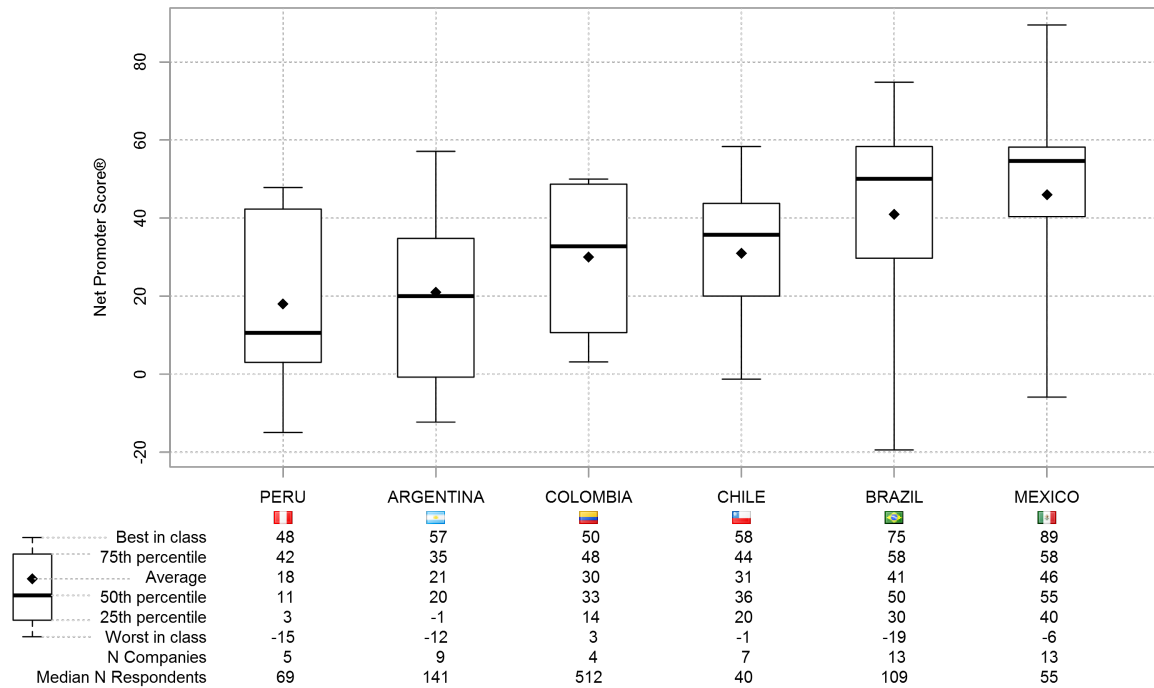
### 2.1 Regonal Benchmarks



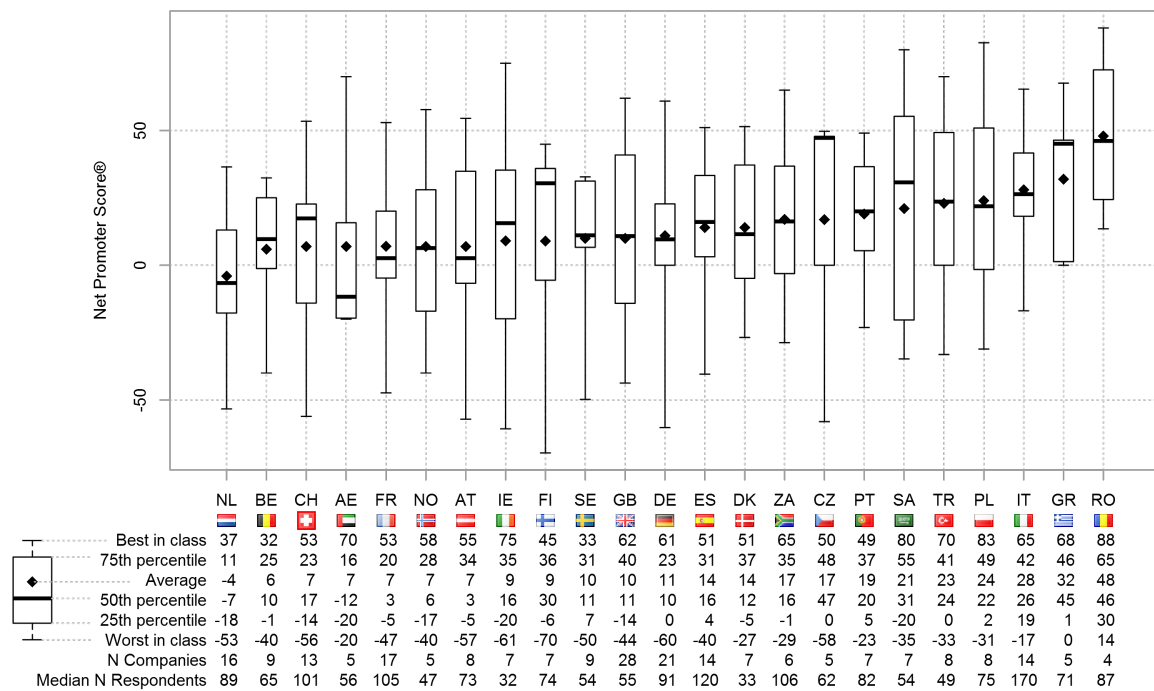
### 2.2 Countries within NAM



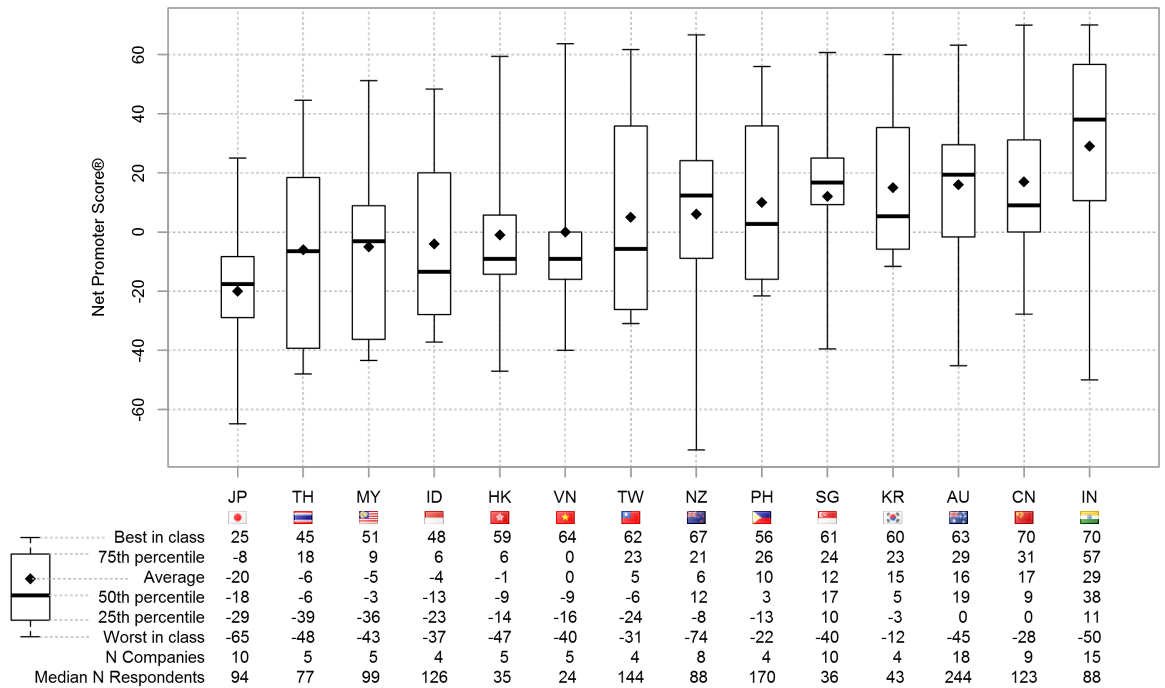
## 2.3 Countries within LATAM



## 2.4 Countries within EMEA



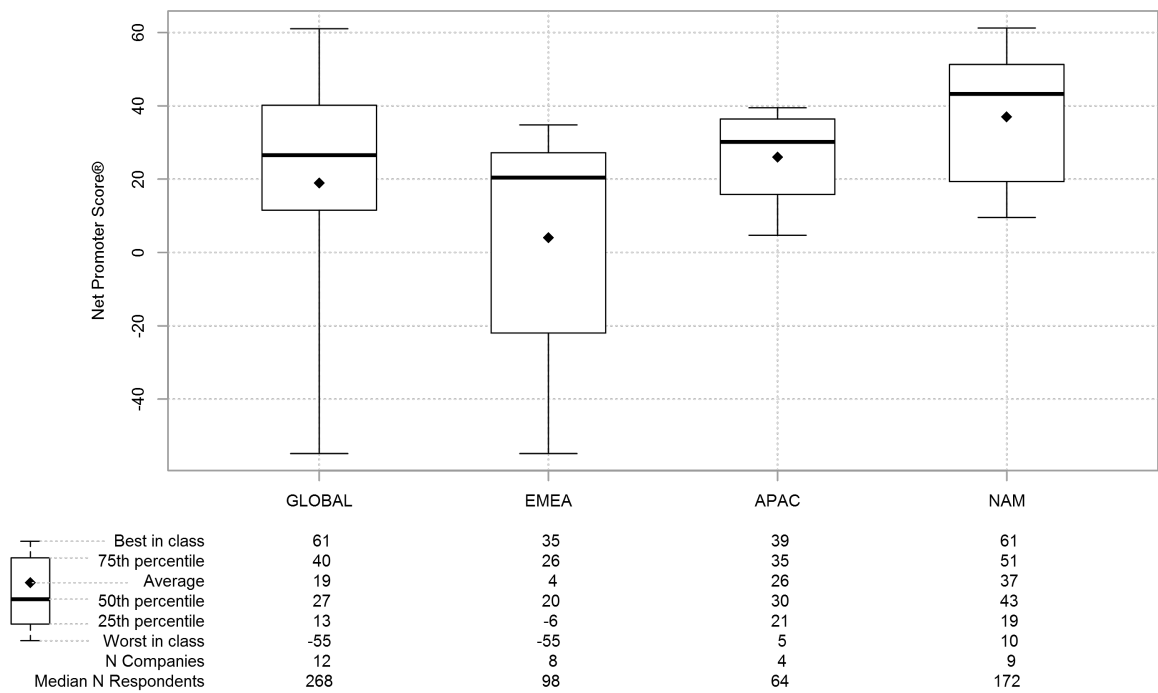
## 2.5 Countries within APAC



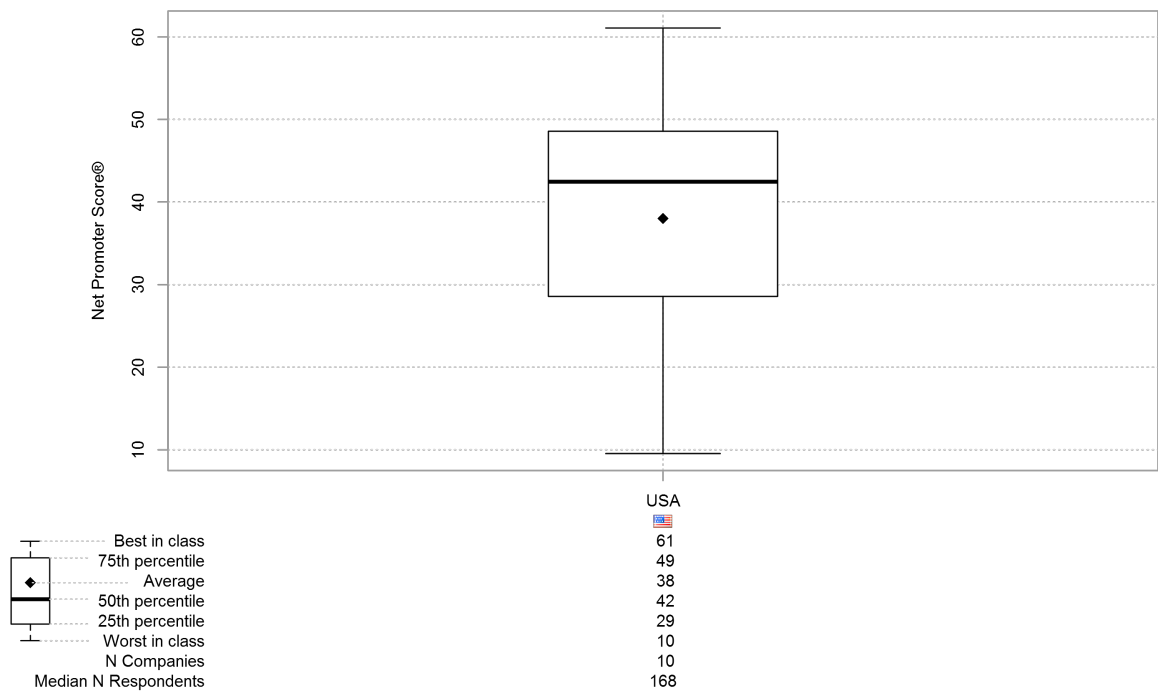


# 3 Telecommunications B2B NPS

## 3.1 Regional Benchmarks



## 3.2 Countries within NAM



## 4 Appendix

### 4.1 Differences to Market Research Panels

Unlike most B2B benchmarks, data for the Satmetrix B2B benchmarks are drawn directly from the data collection systems of participating Satmetrix clients' internal Net Promoter programs. Because of this, there are important differences compared to a traditional study drawn from a B2B market research panel

#### Advantages of this approach

**Response Authenticity** It is not possible for a B2B panel provider to be certain that respondents are real users of a particular product or service. Relevance to the relationship is typically self-reported.

By contrast, respondents in the Satmetrix B2B benchmark study are drawn from participants' own customer lists, and contain only those respondents with relevant experience and influence regarding the relationship, as determined by the participating company.

**Reaching Decision Makers** While decision makers in high-value relationships have good reason to offer their vendors direct feedback via Net Promoter programs, they are not typically members of market research panels. In some cases they may be contractually prevented from disclosing views to a third-party research group. By only using data from participants' own internal Net Promoter programs, the Satmetrix B2B benchmarks have much greater access to high-value respondents.

**Sample Size & Cost** As participation in B2B market research panels is relatively uncommon, panels can often be exhausted before reaching a suitable sample size for a particular company. Expenses for incentives, research, and administration mean that an individual B2B response can often cost hundreds of dollars to solicit.

The 2015 Satmetrix B2B benchmarks are drawn from responses of 484,412 individuals, rating 97 companies, from 45 countries. This scale of coverage would not be possible with a traditional market research panel. As there are no incentives to pay, Satmetrix can keep costs low for purchasers of this product.

#### Disadvantages of this approach

**Industrial Coverage** As the companies included in this benchmark are a subset of Satmetrix's client base, it is not possible to cover all industries for which there is demand, or to cover all industries with equal breadth and depth. As geographical coverage for some industries is not available, the 'All industry' B2B benchmark is also provided, to allow purchasers to make geographical comparisons.

**Companies Represented** The individual companies included each year's study depends upon Satmetrix's customer base, and participation in normative research. This means that scores may shift annually due to new companies entering or leaving the cohort.

### 4.2 Methodology

#### Data Preparation

##### Industry classification

Companies' industries are classified using desk research based on a case-by-case basis. While classification systems such as Standard Industrial Classification (SIC) and the North

American Industry Classification System (NAICS) are consulted where available, companies outside the United States often lack classification codes. The chosen approach allows Sat-metrix to adjust the breadth of classification to offer the most specificity possible in areas where data is rich.

The High-Tech B2B benchmark is comprised of companies in either the Computer Hardware or Computer Software industries.

### Geographic classification

The location of the respondent, not the place-of-business being rated, forms the basis for geographical classification used in these benchmarks. Where participating companies have reliable data on the location of their contacts, this is used to locate respondents. Where this is not available, respondents are geolocated via the IP address the response was sent from.

### Calculation & Compilation

- For a particular geographical unit (e.g. a country), each company's data is filtered to just responses from that region.
- Each company's NPS is then calculated from those responses. Scores derived from less than 15 responses are rejected.
- Then summary statistics on the range of scores observed (across different companies) are presented as the benchmark. Statistics derived from less than four Net Promoter Scores are not included.

## 4.3 Creating Custom Regions

While the regional classifications of APAC, EMEA, LATAM, and NAM are commonly used, many businesses used custom sales regions, or may not operate in certain countries. Additionally, certain regions are very sensitive to the proportion of responses which come from each country – what's representative of the study's cohort may not be representative of your business.

This section walks-through the process by which our consulting team may use the Sat-metrix 2015 B2B Benchmark report to create benchmarks for regions which may map more closely to your respondent base.

### An example

Let's say that your company reports internally on a region called UK-FR-DE, which includes only the UK, France, and Germany. When you report NPS for the UK-FR-DE region internally, 50% of the respondents are from the UK, 30% from France, and 20% from Germany.

For each company in the B2B benchmark cohort, we can estimate their UK-FR-DE score, using a *weighted average*. In this case, we'd multiply each company's UK NPS by 0.5, its Germany score by 0.3, and its France score by 0.2, and sum the results to reach the company's UK-FR-DE estimate. We can do this for each company in the benchmark cohort.

We can now use these UK-FR-DE scores to create the same summary statistics as in the main report, such as the average, or best-in-class NPS.

### Dealing with missingness

Not all companies operate in all countries. In the case that a score is missing for the procedure above, we recommend adjusting the weights to exclude that country. So, in the example above, if *Company A* did not operate in France, its weighted average would consist of only its scores from the UK and Germany. We can re-calculate the weights so that they sum to one

(for example, the weight for the UK would be  $\frac{0.5}{0.5+0.2} = 0.71$ , and the weight for Germany would be  $\frac{0.2}{0.5+0.2} = 0.29$ ).

#### **4.4 Netpromoter.com**

For more information on the Net Promoter metric and discipline, visit the official website of the Net Promoter Network at [www.netpromoter.com](http://www.netpromoter.com). The site also includes information on community events, training opportunities, and other new developments for companies using Net Promoter.

#### **4.5 About Satmetrix**

Satmetrix is the leading provider of cloud-based customer experience software for companies worldwide. As co-developer of the industry-leading Net Promoter methodology, its applications deliver full process support to help companies reduce customer churn, mobilize loyal promoters, generate more powerful insights and drive customer obsession through accountability. With experience on more than 700 deployments in 40 languages, Satmetrix has the knowledge to accelerate the success of customer experience efforts using Net Promoter. For more information, visit [www.satmetrix.com](http://www.satmetrix.com), or call us at 1.888.800.2313 in North America, or +44.845.371.1040 in the UK and Europe.

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