

# TELCO FLASH SURVEY

Q4 2020 Edition

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# IN OCTOBER 2020, OLIVER WYMAN CONDUCTED A GLOBAL SURVEY TO UNDERSTAND CONSUMER ATTITUDES TOWARDS TELECOMS SERVICES

6,020 persons surveyed across 

## Key Questions



Attitude change towards telco since pandemic outbreak



Willingness to pay for additional services



Appetite for 5G and readiness to switch to 5G services



What matters for customers when buying telco services



Importance of Mobile or Home broadband



Preferred channel to purchase and access your telco service before and after lockdown

## Key learnings

- **Telco services becoming critical, particularly for professional life**  
→ *Opportunity for work from home offers and campaigns for Fiber*
- **Home BB quality is key: ~21% of the surveyed population willing to pay 20% more for faster BB**  
→ *There's a premium to defend in Fiber*
- **still 1/2 to 2/3 of surveyed population don't care /skeptical about 5G**  
→ *Signification education to be done on 5G*
- **Price, quality and customer service remain the key expectation across all countries**
- **For France, UK and Germany consumers broadband connection at home is more important than mobile**
- **On the other hand Spain, US and UAE consumers are giving more importance to mobile**
- **Since the pandemic, digital channel won up to +3pts of preference.**
- **...call centers are gaining also interest in Germany and Spain**  
→ *Shift to online is not a given yet*

# A REPRESENTATIVE SAMPLE SURVEYED IN 5 COUNTRIES



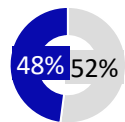
9<sup>th</sup> – 11<sup>th</sup>  
October 2020

1,002

31%  
AGES 18-34

40%  
AGES 35-54

29%  
AGES 55+



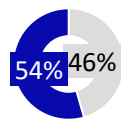
8<sup>th</sup> – 11<sup>th</sup>  
October 2020

1,007

29%  
AGES 18-34

39%  
AGES 35-54

32%  
AGES 55+



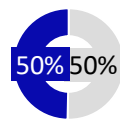
9<sup>th</sup> – 11<sup>th</sup>  
October 2020

1,007

33%  
AGES 18-34

42%  
AGES 35-54

25%  
AGES 55+



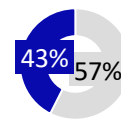
9<sup>th</sup> – 14<sup>th</sup>  
October 2020

1,000

33%  
AGES 18-34

42%  
AGES 35-54

25%  
AGES 55+



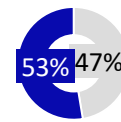
9<sup>th</sup> – 13<sup>th</sup>  
October 2020

1,001

25%  
AGES 18-34

38%  
AGES 35-54

37%  
AGES 55+



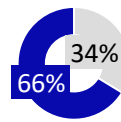
9<sup>th</sup> – 25<sup>th</sup>  
October 2020

1,003

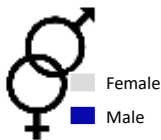
50%  
AGES 18-34

37%  
AGES 35-54

13%  
AGES 55+



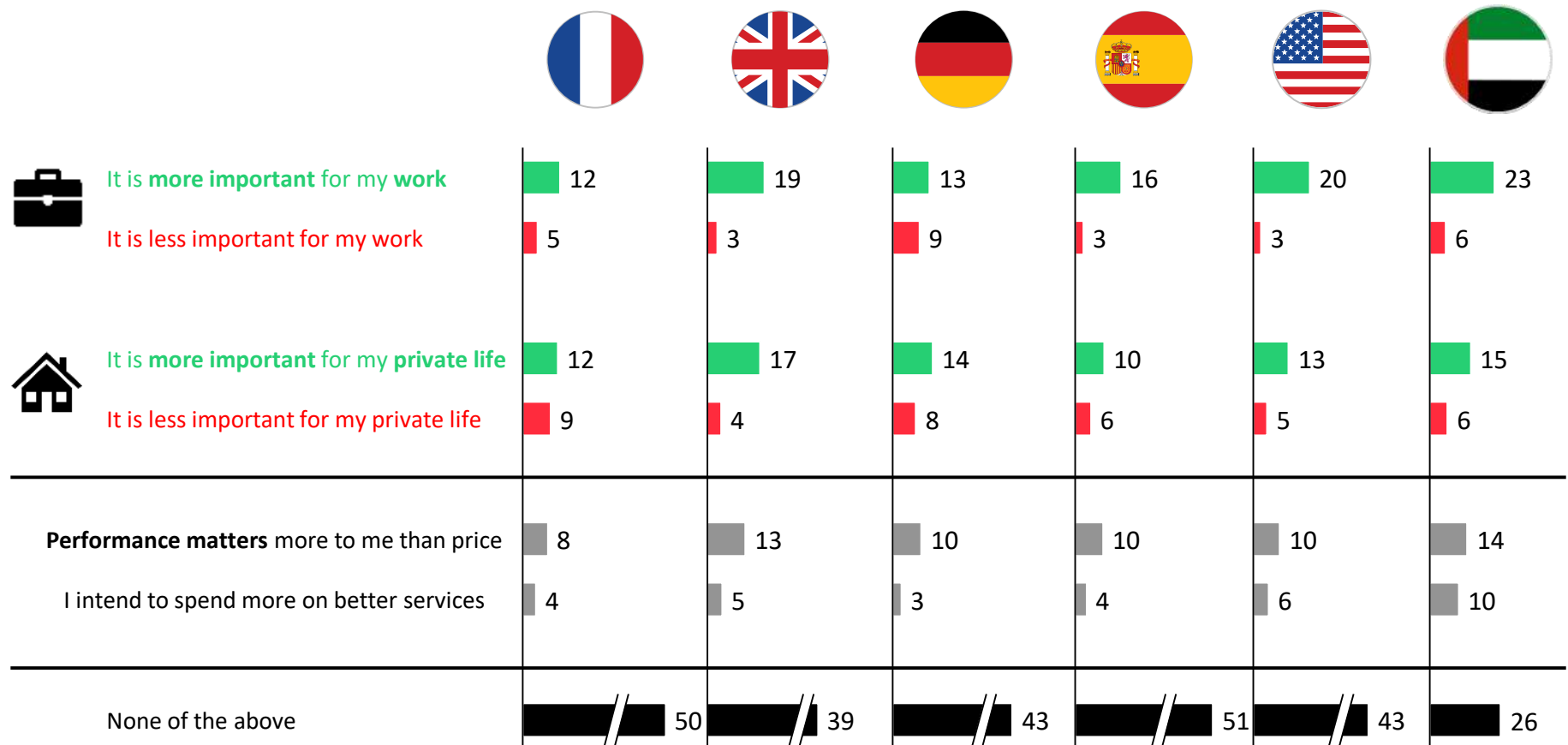
SURVEY  
RESPONDANTS



# ¼ TO ½ OF THE SURVEYED POPULATION CONSIDER TELCO SERVICES BECOMING MORE CRITICAL AND MORE SO FOR THE PROFESSIONAL LIFE

Q: Since the outbreak of the pandemic, how has your attitude towards your telecommunications service provider at home changed?

% of country's respondents<sup>1</sup> (multiple answers possible)

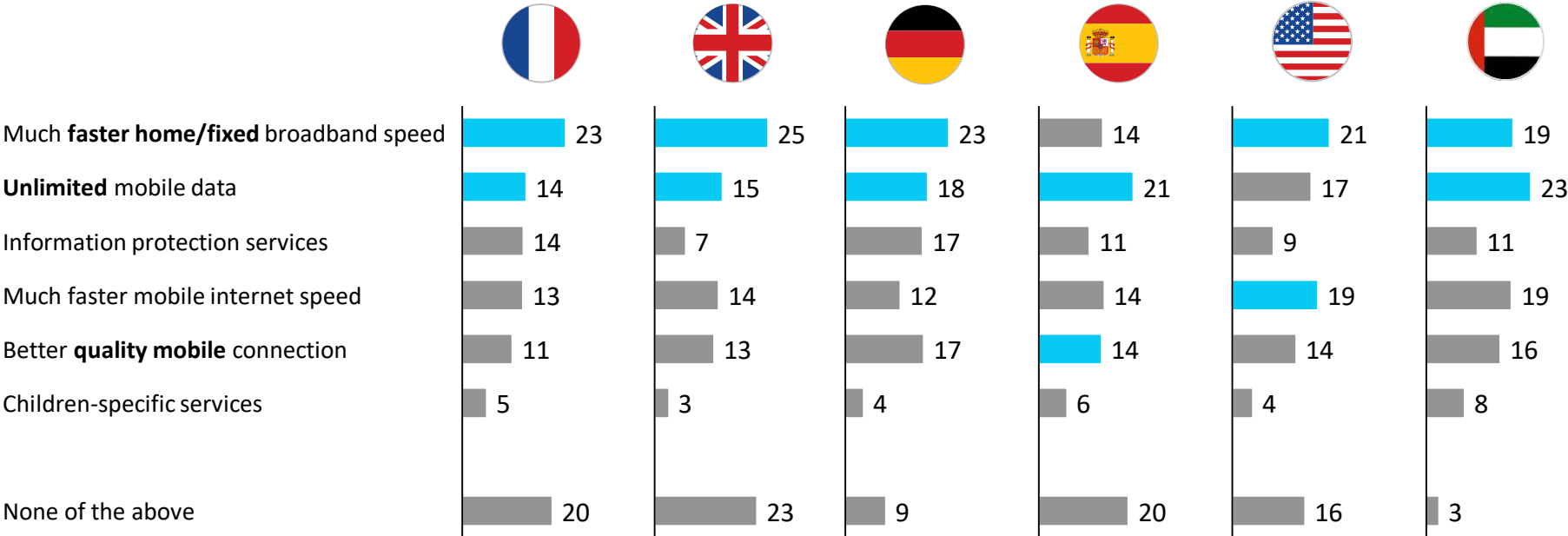


1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

# IMPROVING HOME BROADBAND (HBB) CONNECTIVITY IS KEY. 20%-25% OF THE SURVEYED POPULATION WILLING TO PAY 20% MORE FOR FASTER HBB

Further deep-dive in annexe

**Q: Would you be willing to pay 20% more on your telecommunications contract to get the following improvements?**  
 % of country's respondents<sup>1</sup> (multiple answers possible)



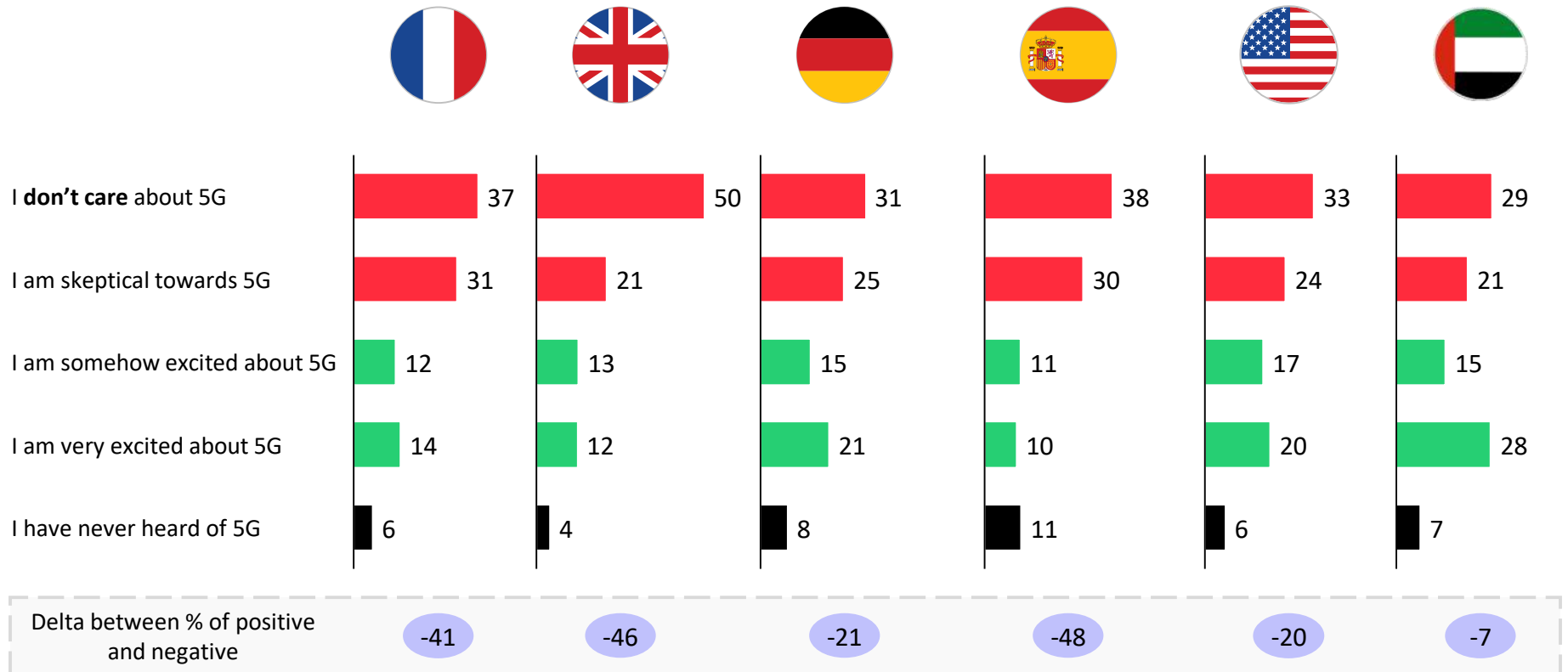
- Respondent willing to pay for faster home broadband and unlimited mobile data are the ones who are most excited by 5G
- Younger respondents are willing to pay more for unlimited data whereas elder respondents are willing to pay more for faster home broadband
- In Germany, high WTP with 18-24 most willing to pay for data protection, same for the elder population
- In France, elder respondents are overall reluctant to pay apart for faster home and data protection

Top 2 features

1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
 Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

# 50% TO 66% OF SURVEYED POPULATION DON'T CARE OR ARE SCEPTICAL ABOUT 5G, SIGNIFICATION EDUCATION TO BE DONE

**Q: How do you feel about 5G?**  
% of country's respondents<sup>1</sup>

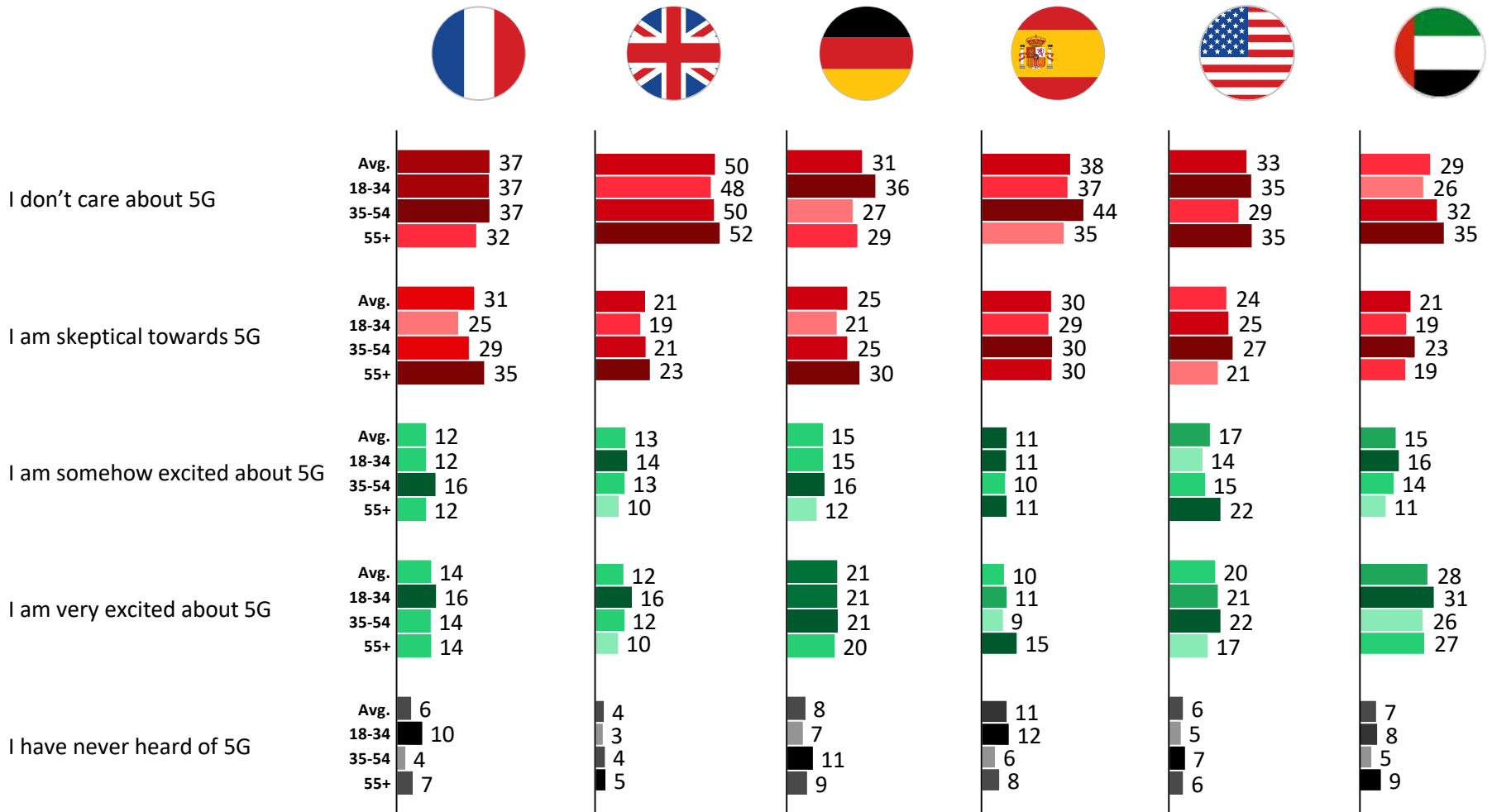


UAE, Germany, and the US are the most excited about 5G

1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

# SKEPTICISM AND DISINTEREST TOWARDS 5G CONSISTENT ACROSS ALL AGE GROUPS

Details

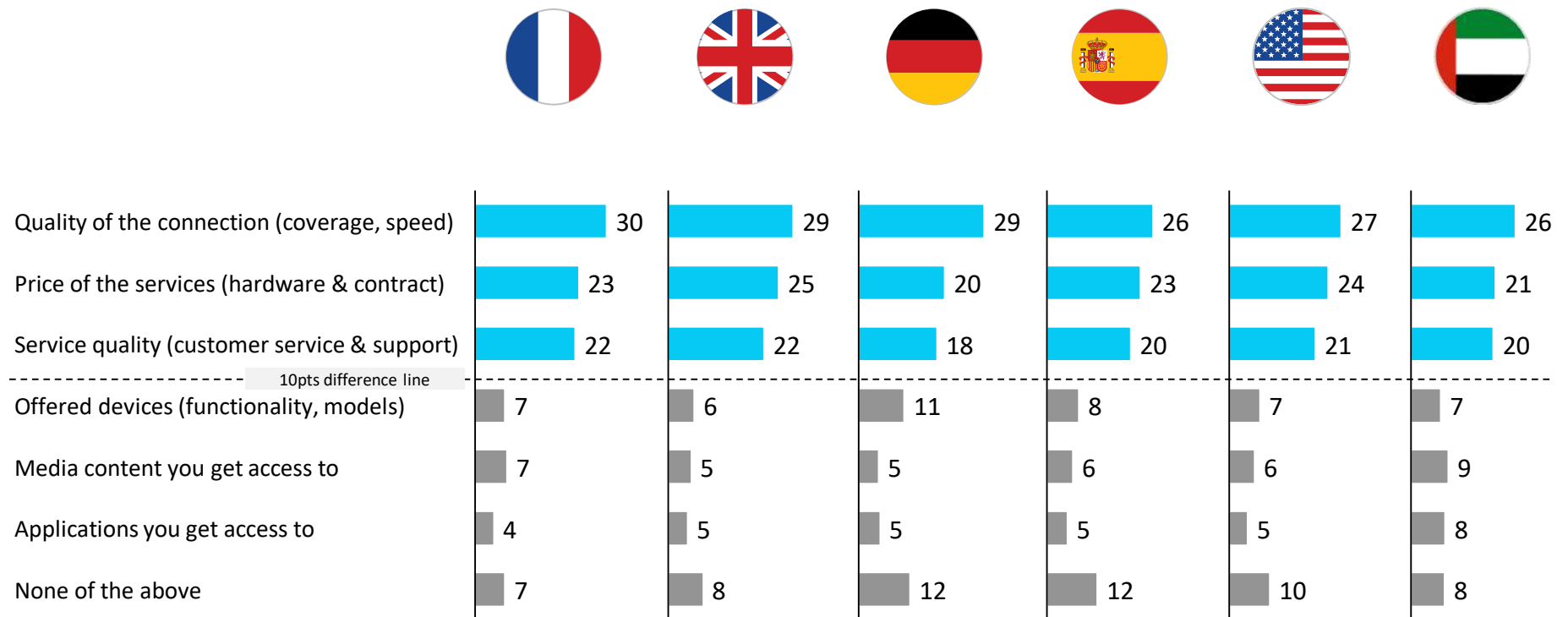


1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 750 for UAE  
 Source: Oliyer Wyman Telco COVID-19 Survey, Oliver Wyman



# PRICE, QUALITY AND CUSTOMER SERVICE REMAIN THE KEY EXPECTATION ACROSS ALL COUNTRIES

**Q: What is most important to you in a telecommunications service provider offering? Pick your top 3**  
 % of country's respondents<sup>1</sup> (multiple answers possible)

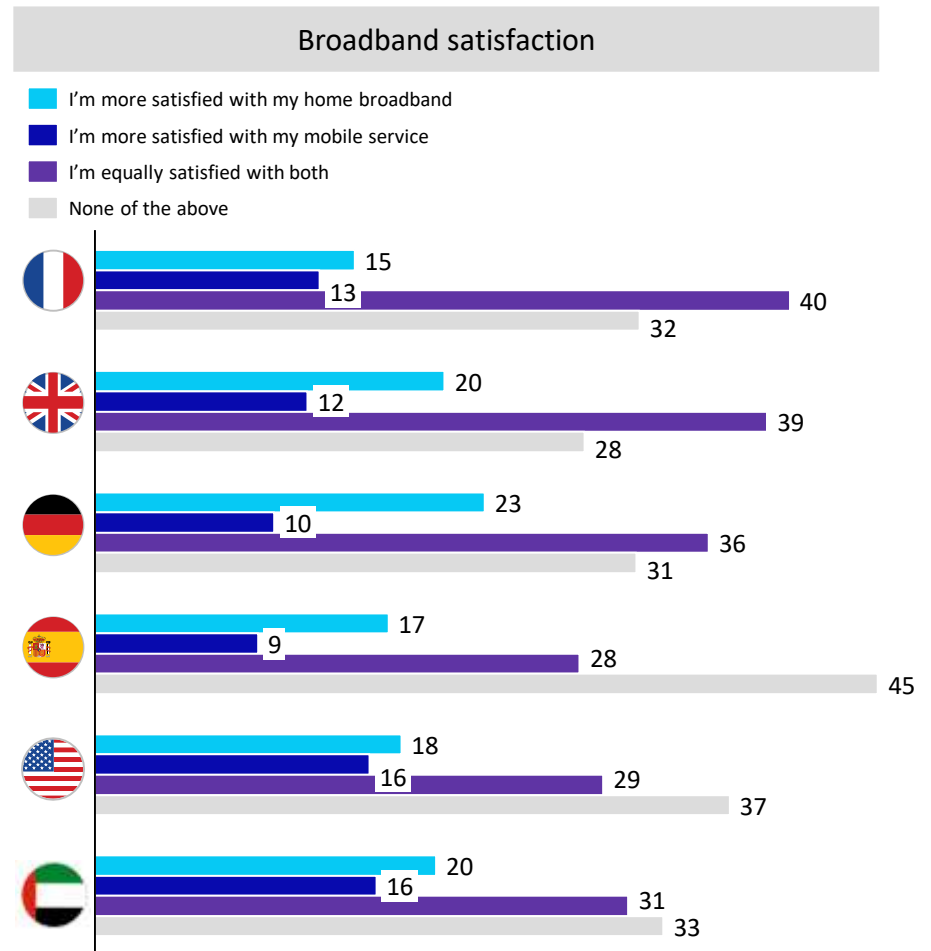
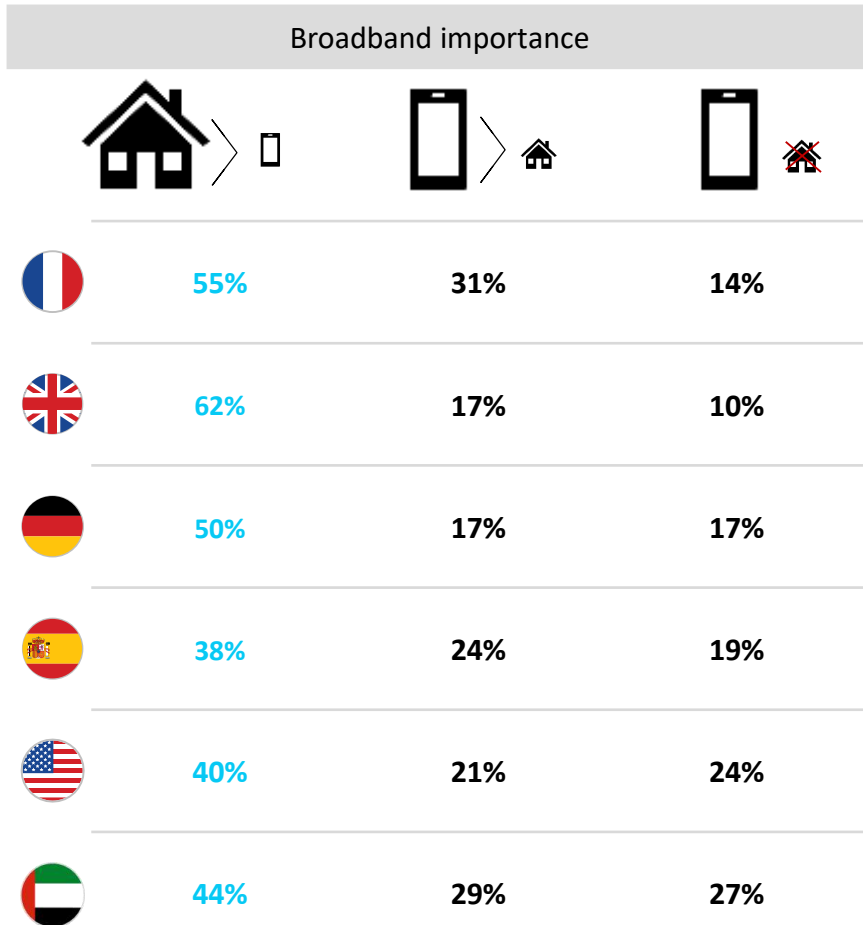


Top 3 features

1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
 Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

# HOME BROADBAND IS THE KEY EXPECTATION

**Q: How much do mobile and fixed broadband services at home (DSL, fiber) matter to you, and how satisfied are you?**  
 % of country's respondents<sup>1</sup> (multiple answers possible, normalized to 100 topic of broadband importance and satisfaction)

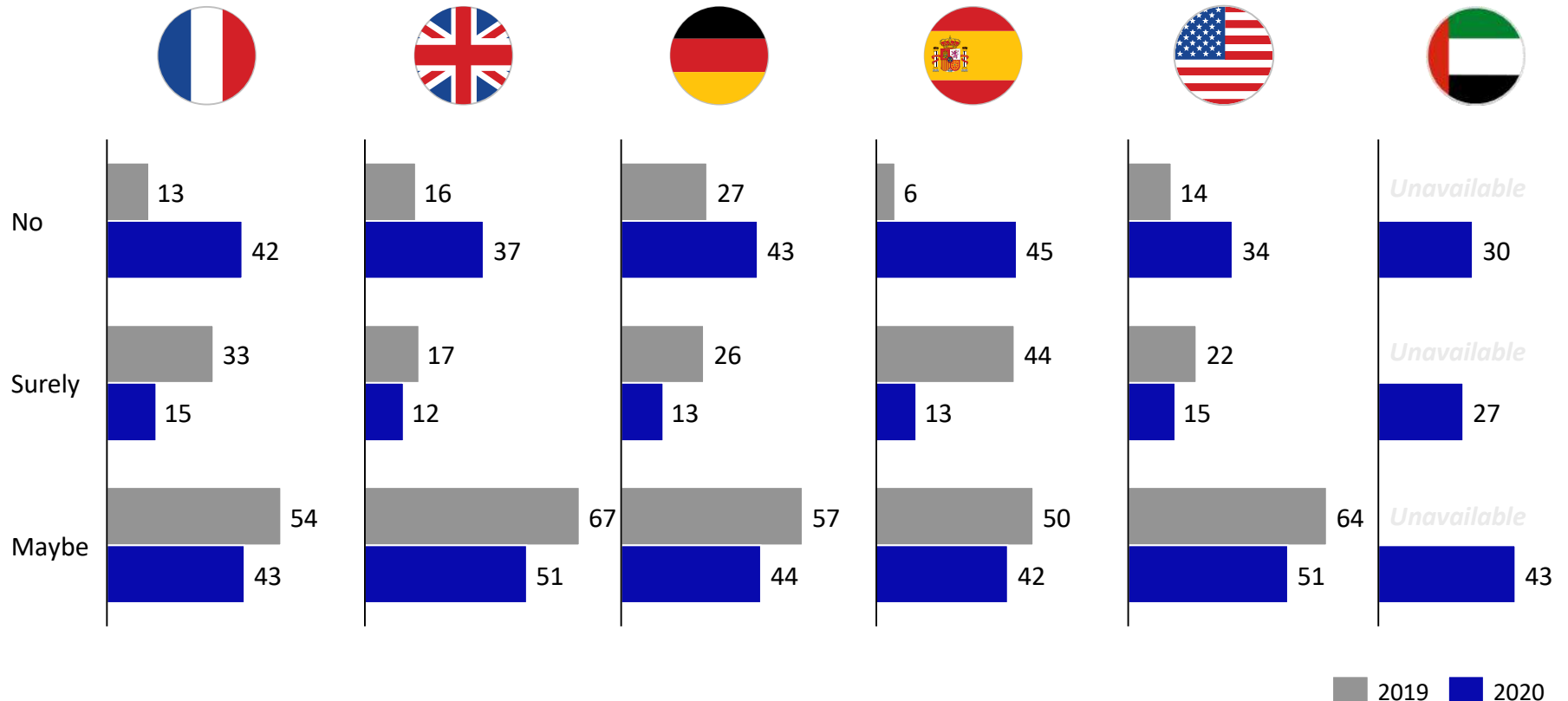


1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
 Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

# PEOPLE ARE MORE RELUCTANT TO SWITCH ALL CONNECTIVITY TO 5G

**Q: Assume your mobile/wireless provider could provide all your home services (internet/wifi, TV, phone) through 5G, and provide a unified bill, would you be willing to make the switch?**

% of country's respondents<sup>1</sup>

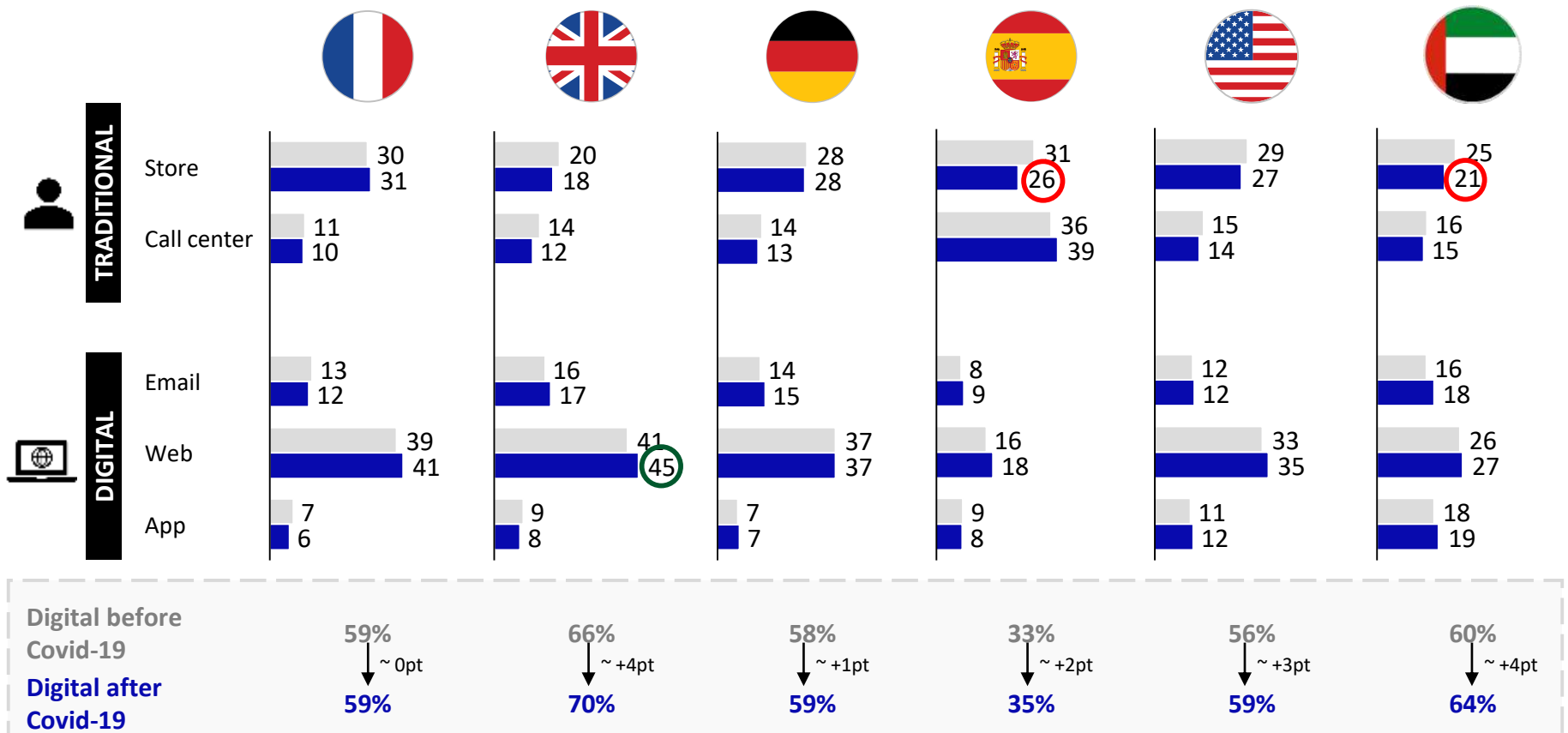


1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
Source: Oliyer Wyman Telco COVID-19 Survey, Oliver Wyman

# SINCE THE PANDEMIC, DIGITAL CHANNEL WON BETWEEN 0 PTS AND +4 PTS OF PREFERENCE FOR SALES

Before Covid-19 After Covid-19

Q: What is your preferred channel to purchase a telecommunications service before and after Covid-19?  
% of country's respondents<sup>1</sup>



1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

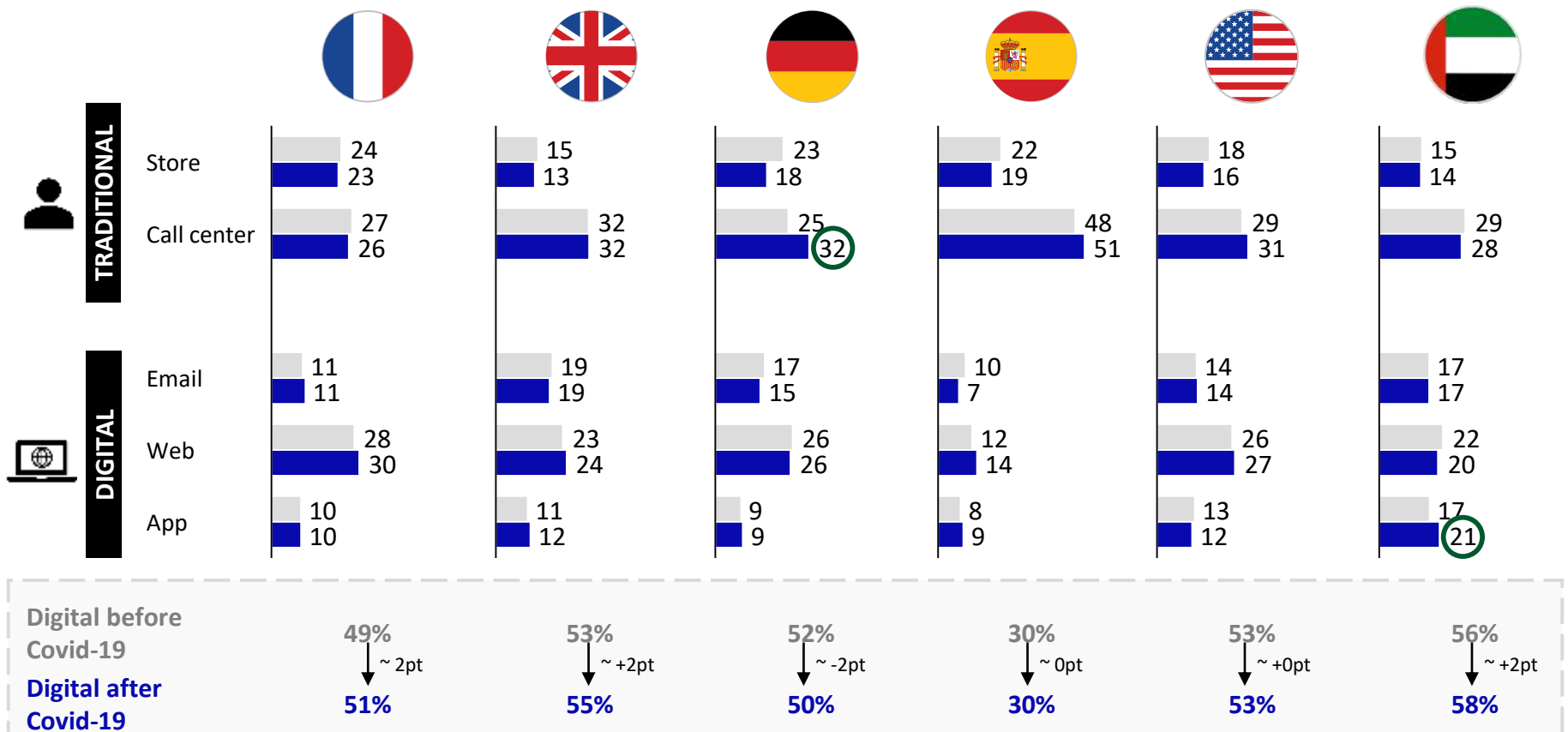
Greatest shift post-covid  
 Up or down >=4pts

# SINCE THE PANDEMIC, DIGITAL CHANNEL WON BETWEEN 0 PTS AND +2 PTS OF PREFERENCE FOR CARE

Before Covid-19 After Covid-19

What is your preferred channel to access your telecommunications service provider's customer support before and after Covid-19?

% of country's respondents<sup>1</sup>



1. Number of respondents per country in 2020: 1002 for France, 1007 for UK, 1007 for Germany, 1000 for Spain, 1001 for US and 1,003 for UAE  
Source: Oliver Wyman Telco COVID-19 Survey, Oliver Wyman

Greatest shift post-covid  
 Up or down >=4pts

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