

# GLOBAL CONSUMER SURVEY 2023

Telecom Operators: Mobile and Fixed Connectivity

July 2023



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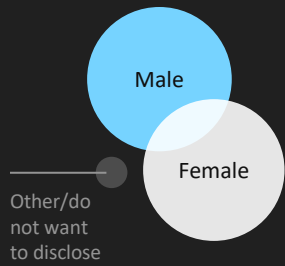
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# SAMPLE DETAILS

Sex distribution



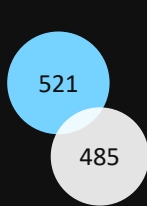
Age distribution (%)



France

**1,006**

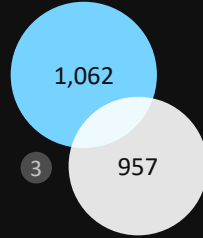
Total



Germany

**2,022**

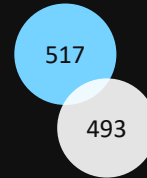
Total



Italy

**1,010**

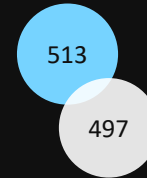
Total



Spain

**1,010**

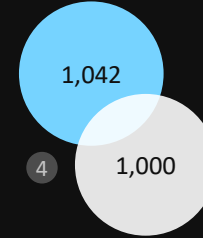
Total



UK

**2,046**

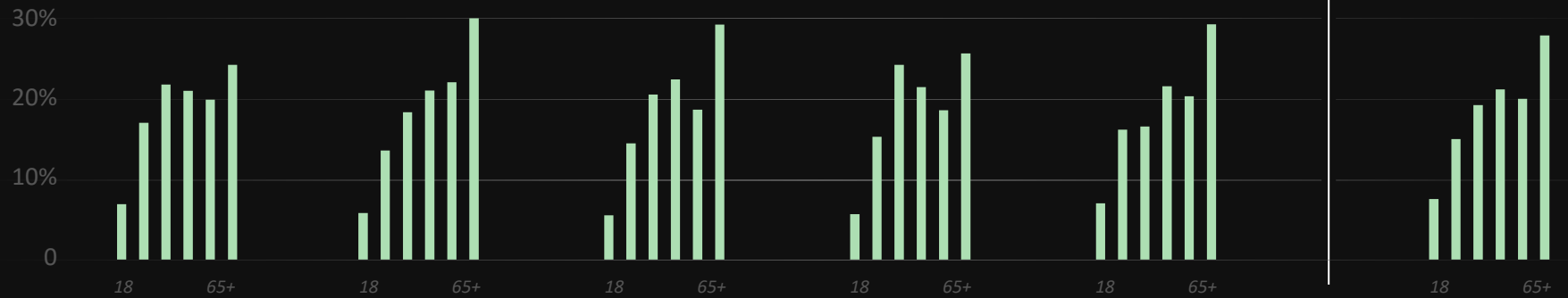
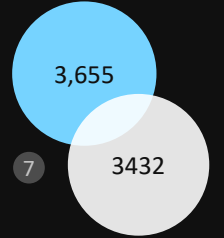
Total



Europe

**7,094**

Total



1

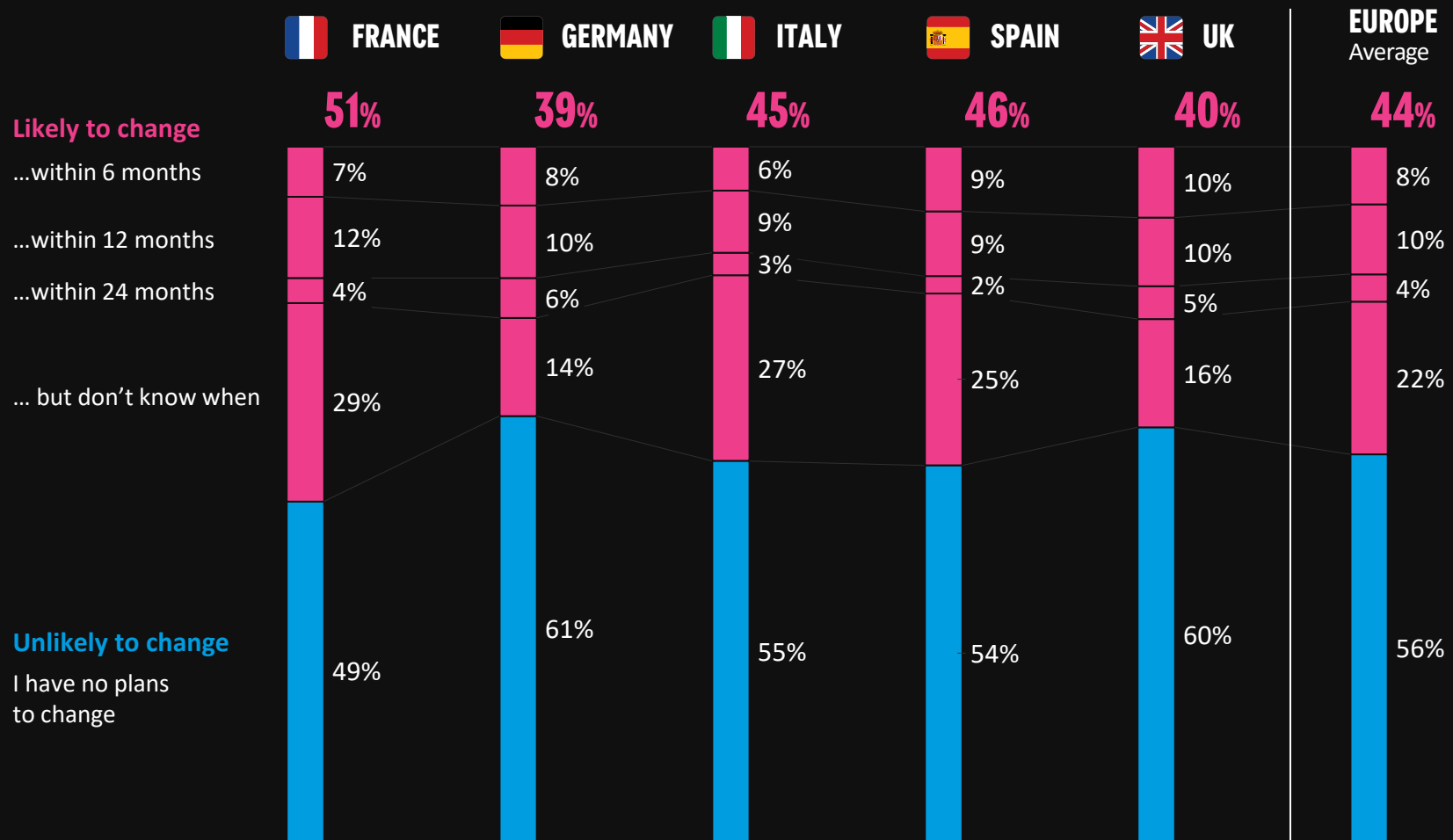
**TELECOM OPERATORS:  
MOBILE AND FIXED CONNECTIVITY**





# 44% OF EU CONSUMERS PLAN TO SWITCH THEIR MOBILE OPERATOR. FRANCE ACCOUNTS FOR THE HIGHEST CHURN INTENTION IN EU WHILE GERMANY FORESEES MORE STABLE TRADING DYNAMICS

**How likely are you to switch mobile phone service provider?**  
% of respondents



Source: Oliver Wyman Telco Consumer Survey 2023.



# PRICE IS THE SINGLE MOST RELEVANT DECISION ELEMENT ACROSS MARKETS. ESG AND HOLISTIC OFFERINGS BEYOND THE TELCO CORE ARE NOT SEEN AS COMPETITIVE ADVANTAGES

**Please rank (1-10) each factor when deciding your next mobile service purchase**

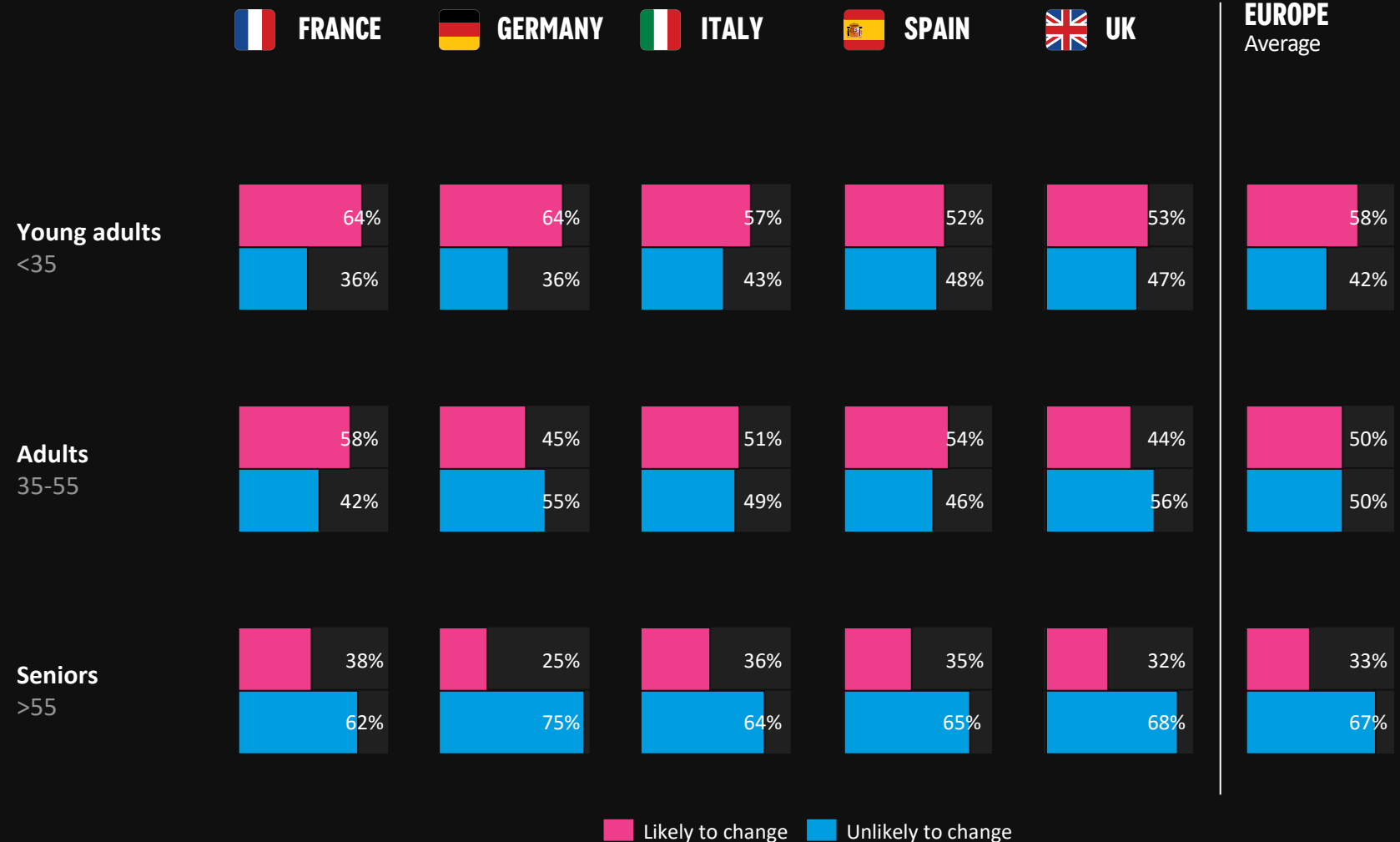
Average ranking by respondents considering to switch (1=most important, 10=least important)

	FRANCE	GERMANY	ITALY	SPAIN	UK	EUROPE Average
Price	1	1	1	1	1	1
Network performance/speed	2	3	3	2	3	2
Data allowance	3	2	4	3	2	3
Customer service	4	5	5	4	4	4
Regional coverage	5	4	2	5	5	5
Handset included	6	6	6	6	6	6
Bundled media, gaming & ent. services	8	8	8	7	7	7
Bundled with other non-telco serv. (energy, sec.)	7	7	7	8	8	8
Bundled financial services	10	10	10	9	9	9
Better ESG qualifications	9	9	9	10	10	10

Source: Oliver Wyman Telco Consumer Survey 2023.

# YOUNGER CONSUMERS ARE MORE PRONE TO SWITCH OPERATORS WHILE SENIORS ARE MORE LOYAL ((📶)) – THAT BEING A PARTICULARLY STRONG PATTERN IN GERMANY

How likely are you to switch mobile phone service provider?  
 % of respondents



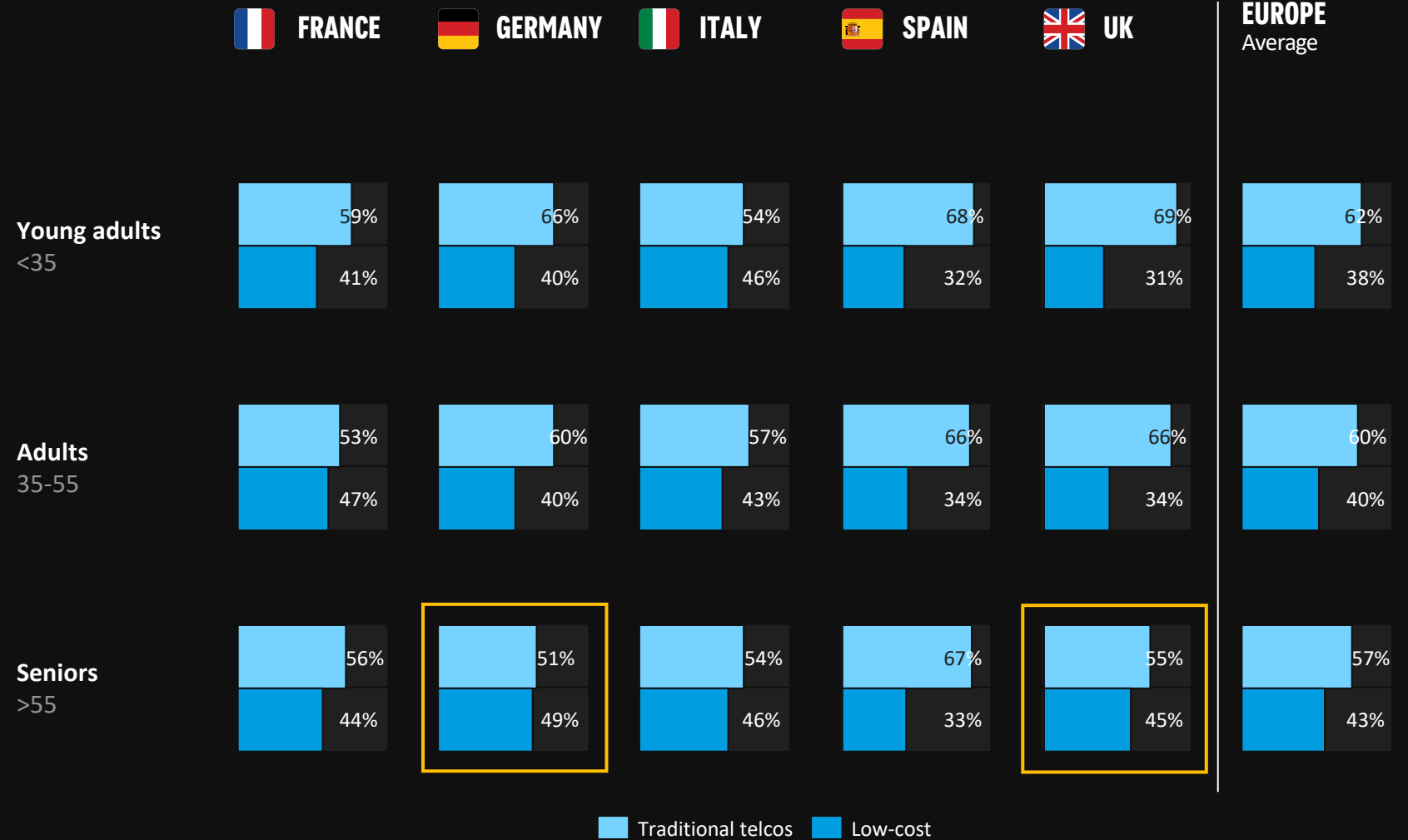
Source: Oliver Wyman Telco Consumer Survey 2023.



# LOW-COST OPERATORS SHOW A BALANCED PENETRATION ACROSS AGE SEGMENTS BEING EXCEPTIONALLY STRONG AMONG SENIORS IN GERMANY AND UK

Please indicate the primary mobile service provider for your household

% of respondents



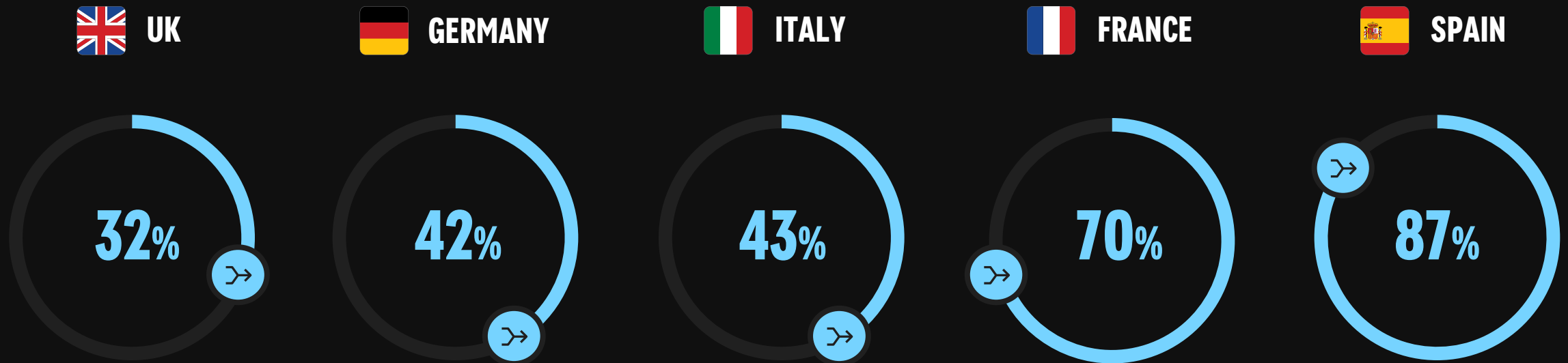
Source: Oliver Wyman Telco Consumer Survey 2023.



# SPAIN HOLDS THE HIGHEST CONVERGENCE PENETRATION IN EUROPE AND UK THE LOWEST

## FMC penetration by country

2023; % of households where the same operator provides fixed broadband and the primary mobile line



Source: Oliver Wyman Telco Consumer Survey 2023.

# IN UK, DE AND IT, CONVERGENCE IS INEFFECTIVE TO BIND MOBILE CONSUMERS. IN FR AND ES WHERE 70%+ OF CONSUMERS HAVE FMC PRODUCTS IT IS STILL SEEN A MODERATE BINDING EFFECT

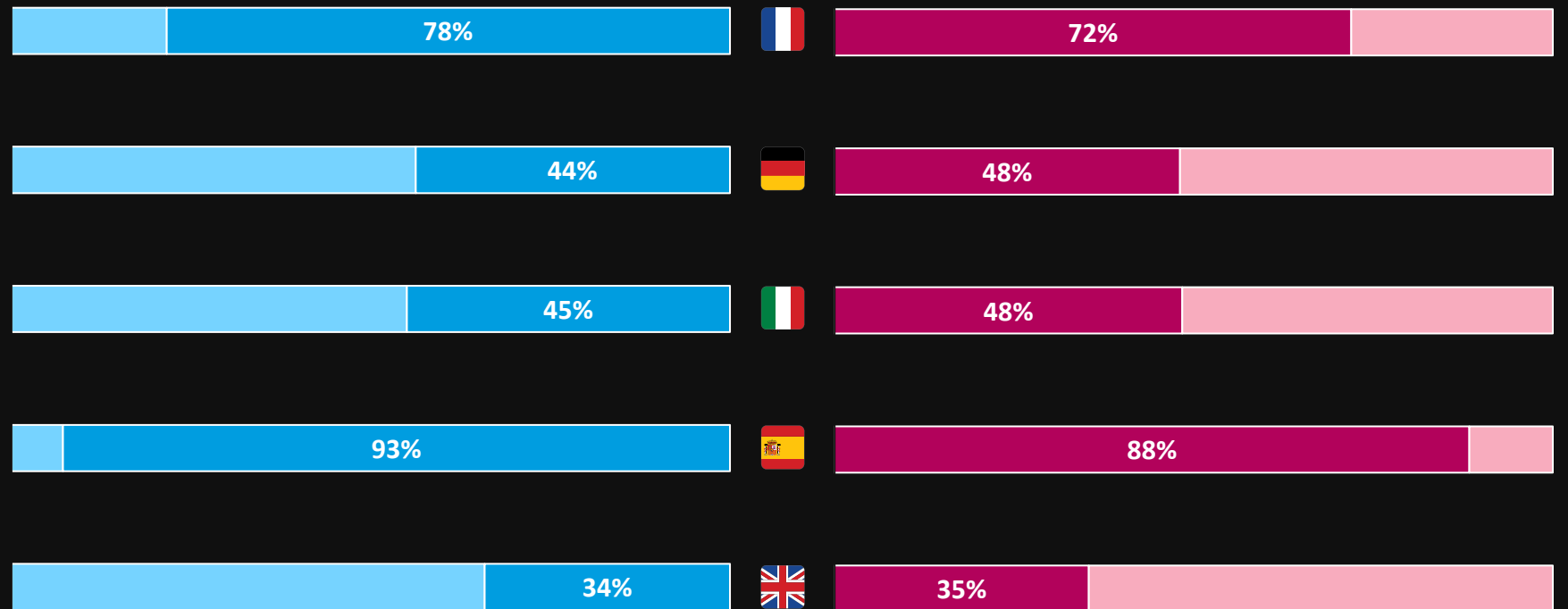
How likely are you to switch mobile phone service provider?

FMC penetration by country for respondents stating a preference

## WILLING TO STAY WITH CURRENT OPERATOR

## WILLING TO SHIFT TO A NEW OPERATOR

Country convergence penetration



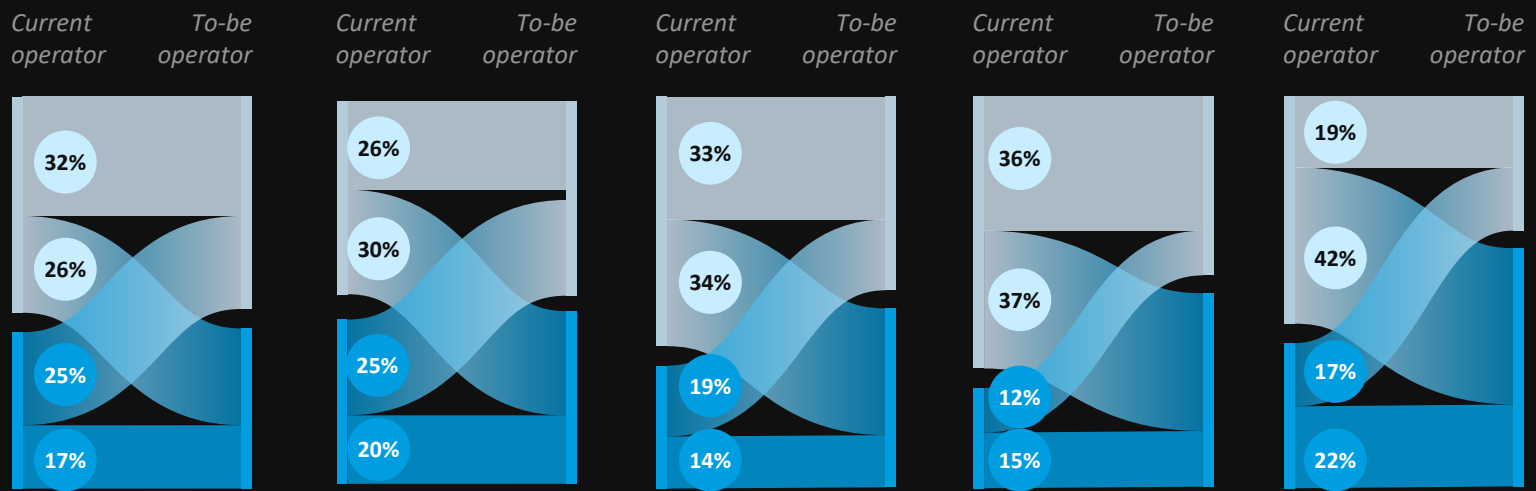
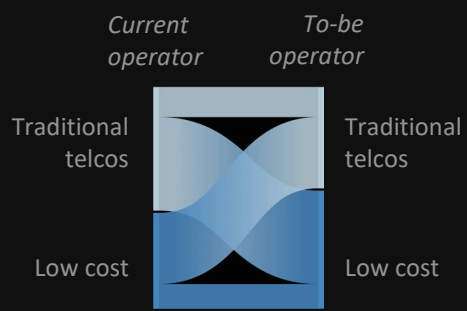
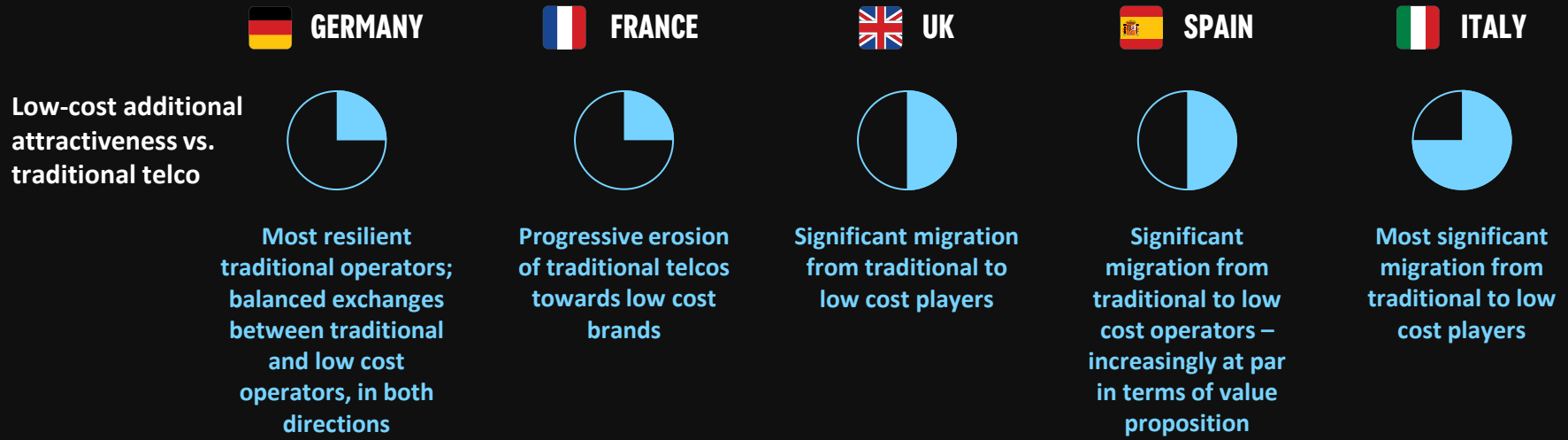
Source: Oliver Wyman Telco Consumer Survey 2023.



# WE CONSISTENTLY SEE A **MIGRATION TO LOW-COST OPERATORS**; GERMANY BEING THE MARKET WHERE TRADITIONAL TELCOS ARE MORE RESILIENT

**Which mobile provider are you thinking about moving to?**

% of respondents considering to switch



Source: Oliver Wyman Telco Consumer Survey 2023.



# ONLY 37% OF EU CONSUMERS ARE WILLING TO PAY EXTRA FOR A 5G CONNECTION - ITALIANS WITH THE HIGHEST WILLINGNESS TO PAY FOR 5G ACROSS AGE SEGMENTS

Would you be willing to pay a little extra in your mobile subscription to enjoy a 5G connection?  
% of respondents

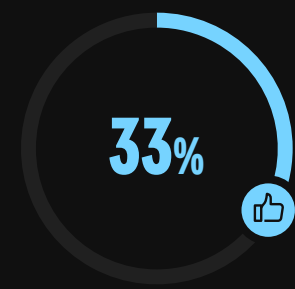
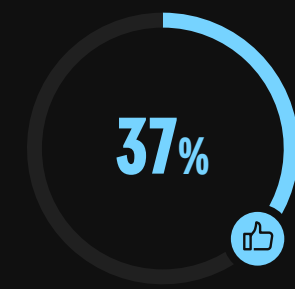
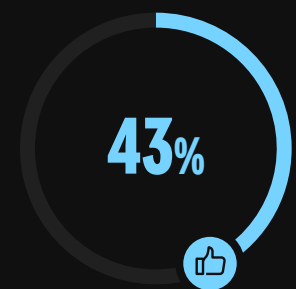
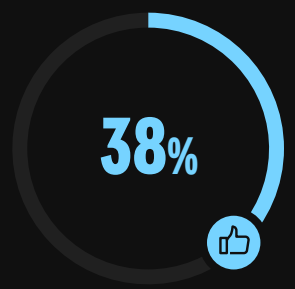
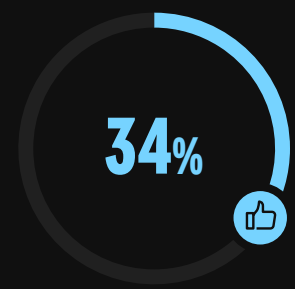
FRANCE

GERMANY

ITALY

SPAIN

UK



Yes

Age cluster	FRANCE					GERMANY					ITALY					SPAIN					UK					
	<35	35-44	45-54	>54	Tot.	<35	35-44	45-54	>54	Tot.	<35	35-44	45-54	>54	Tot.	<35	35-44	45-54	>54	Tot.	<35	35-44	45-54	>54	Tot.	
No value	●	●	●	●	48%	●	●	●	●	44%	●	●	●	●	35%	●	●	●	●	38%	●	●	●	●	●	46%
See value, won't pay	●	●	●	●	18%	●	●	●	●	18%	●	●	●	●	21%	●	●	●	●	25%	●	●	●	●	●	21%
Would pay 0-5% more	●	●	●	●	20%	●	●	●	●	22%	●	●	●	●	24%	●	●	●	●	23%	●	●	●	●	●	20%
Would pay 5-20% more	●	●	●	●	15%	●	●	●	●	16%	●	●	●	●	19%	●	●	●	●	13%	●	●	●	●	●	13%

● <10%   ● 10-25%   ● 25-40%   ● >40%

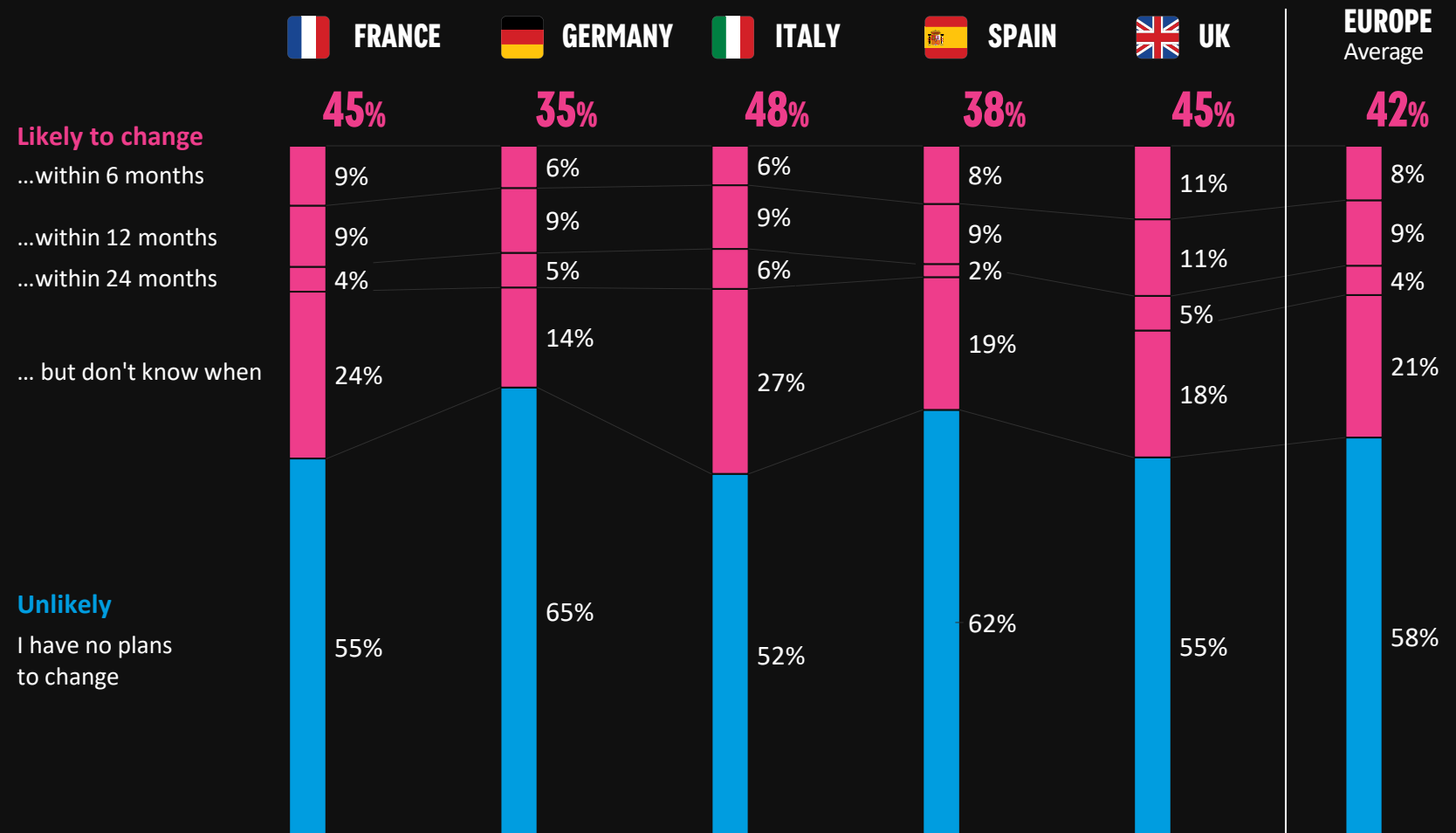
Source: Oliver Wyman Telco Consumer Survey 2023.



# 42% OF EU CONSUMERS PLAN TO SWITCH THEIR FBB OPERATOR. IN ITALY AND UK, FBB EXPECTED VOLATILITY IS GREATER THAN MOBILE

Do you expect to switch home broadband provider?

% of respondents








Source: Oliver Wyman Telco Consumer Survey 2023.



# SIMILAR TO MOBILE, PRICE, SPEED AND RELIABILITY ARE THE KEY DECISION ELEMENTS WHEN SELECTING A NEW BROADBAND PROVIDER

Please rank (1-10) each factor when deciding your next broadband purchase

Average ranking by respondents considering to switch (1=most important, 10=least important)

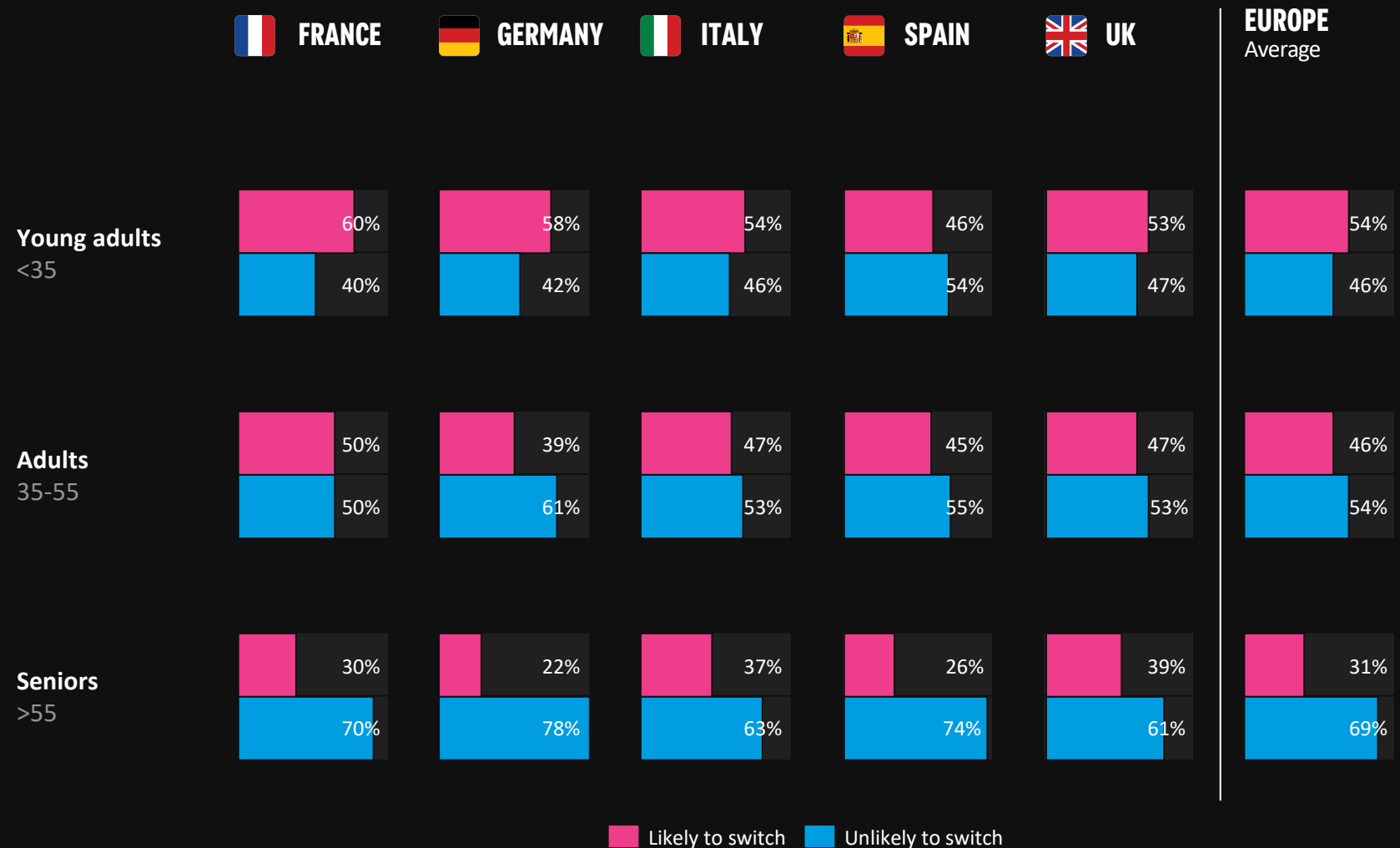
	 FRANCE	 GERMANY	 ITALY	 SPAIN	 UK	EUROPE Average
Price	1	1	1	1	1	1
Speed	2	2	2	2	2	2
Reliability	3	3	3	3	3	3
Customer service	4	4	4	4	4	4
Bundled media, gaming & ent. services	5	5	5	5	5	5
Bundled with other non-telco serv. (energy, sec.)	6	6	6	6	6	6
Bundled financial services	8	7	8	7	7	7
Better ESG qualifications	7	8	7	8	8	8

Source: Oliver Wyman Telco Consumer Survey 2023.



# AS OBSERVED IN MOBILE, YOUNG ADULTS ARE MORE LIKELY TO SWITCH BROADBAND PROVIDER THAN OTHER AGE SEGMENTS

**Do you expect to switch home broadband provider?**  
 % of respondents



Source: Oliver Wyman Telco Consumer Survey 2023.

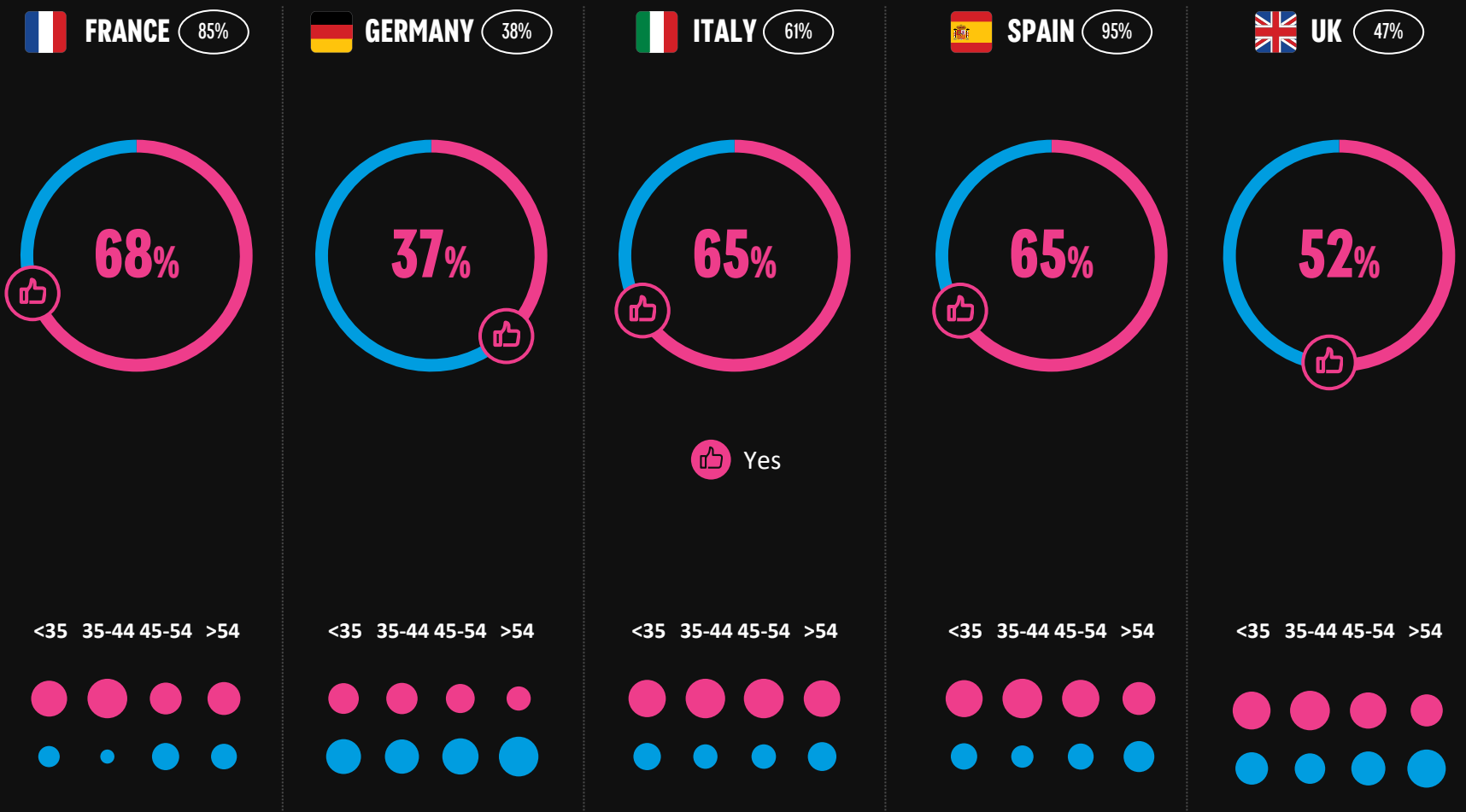


# AS OPPOSED TO 5G, FTTH IS PERCEIVED AS A SUPERIOR TECHNOLOGY ACROSS AGE SEGMENTS. ONLY IN GERMANY, WHERE DEPLOYMENT IS SLOWER, CONSUMERS DECLARE A LOWER INTEREST

XX% FTTH availability

**Are you planning to upgrade your home fixed broadband connection plan to FTTH (fiber at home) in the next 12 months?**

% of respondents, excluding the ones with already FTTH and those without accessibility



Age cluster

Yes

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No, I am not interested in FTTH

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● <10%   ● 10-25%   ● 25-40%   ● >40%

Source: Oliver Wyman Telco Consumer Survey 2023.



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