

# EUROPE'S DIGITAL PULSE

## CONNECTIVITY TRENDS AND CONSUMER INSIGHTS

October 2024

Connect  
Europe

GAME CHANGERS



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- 2.1 Telecom perception in Europe
- 2.2 Consumer choice and competitive markets
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# INTRODUCTION

1

# METHODOLOGY

## SAMPLE DESCRIPTION

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Adults (18-65 y.o.) in Europe that have fixed internet and a mobile plan.

## SAMPLE SIZE

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n = 9600

## QUOTA

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For each country:

- Gender
- Age
- Region

## DATA COLLECTION METHOD

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Online on Ipsos panel

## AVG. INTERVIEW DURATION

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15 minutes

## FIELDWORK PERIOD

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July-August 2024

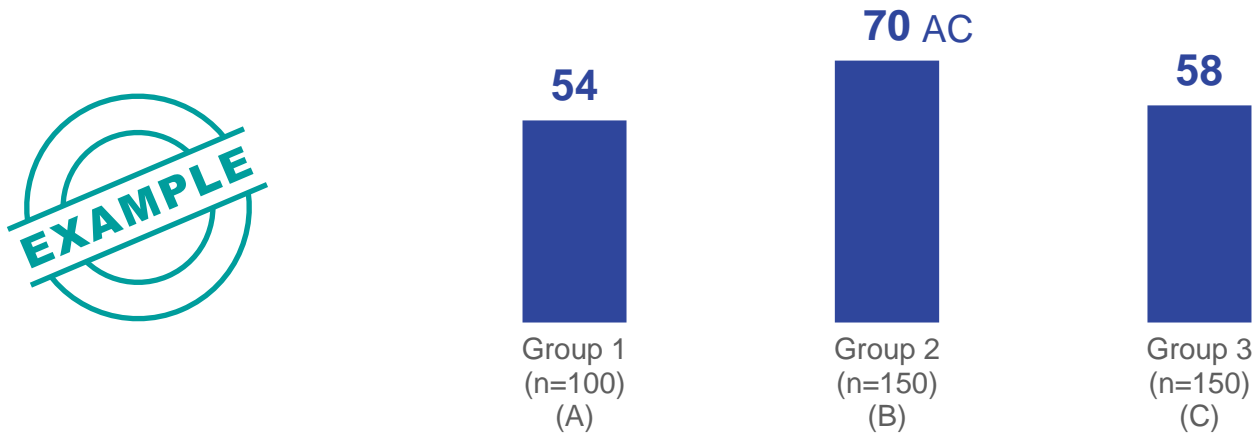


# HOW TO READ THE RESULTS

All reported results are **percentages (%)**, unless indicated otherwise.

Significant differences are always tested for at the 95% confidence level.

- Significant differences between groups are marked via A, B, C, ...
  - Differences are always indicated with the **highest result** in the comparison.
  - E.g. the indication AC with group 2 denotes a significant difference between 70% (B) and 54% (A) and between 70% (B) and 58% (C).



# RESULTS

# 2

# TELECOM PERCEPTION IN EUROPE

# 2.1

## 2. Results

# WHAT IS THE PERCEPTION OF TELECOM PROVIDERS IN EUROPE?

**1**

DO PEOPLE HAVE THE SAME PROVIDER FOR FIXED INTERNET AND MOBILE PLAN?

**2**

HOW SATISFIED ARE EUROPEAN CUSTOMERS?

# DO PEOPLE HAVE THE SAME PROVIDER FOR THEIR FIXED INTERNET & MOBILE PLAN?



**58%**

**FIXED INTERNET & MOBILE PLAN  
AT THE SAME PROVIDER**



**42%**

**FIXED INTERNET & MOBILE PLAN  
AT DIFFERENT PROVIDERS**

# GENERAL SATISFACTION

 **BOTH FIXED AND MOBILE CLIENTS**

Majority of Europeans that have fixed internet and their mobile plan at the same provider give their provider a score of 8 or higher.

## BOTH FIXED INTERNET AND MOBILE CLIENTS



**64%**



**SCORE 8-10**

**25%**



**SCORE 6-7**

**11%**



**SCORE 0-5**



# WHAT IS THE PERCEPTION OF TELECOM PROVIDERS IN EUROPE?

- ✓ Do people have the same provider for fixed internet and mobile plan?
- ✓ How satisfied are European customers?

1

## **MOST HAVE FIXED INTERNET AND MOBILE PLAN AT THE SAME PROVIDER**

58% indicate having the same provider for fixed internet and mobile plan, whereas 42% say they have fixed internet and mobile plan at different providers.

2

## **IN GENERAL, EUROPEANS ARE SATISFIED WITH THEIR PROVIDER**

89% of fixed internet and mobile customers gave their provider a score of 6 or higher.

# CONSUMER CHOICE AND COMPETITIVE MARKETS

# 2.2

## 2. Results

# HOW DO EUROPEANS CHOOSE THEIR TELECOM PROVIDER?

**1** IS THERE SUFFICIENT CHOICE?

---

**2** WHAT IS IMPORTANT WHEN CHOOSING PROVIDERS?

---

**3** HOW DO EUROPEANS FEEL ABOUT SWITCHING PROVIDERS?

# “THERE ARE ENOUGH TELECOM PROVIDERS TO CHOOSE FROM”

Most Europeans agree that there are enough providers to choose from.



# “THERE IS ENOUGH CHOICE AND VARIETY IN THE OFFERS PROVIDED BY TELECOM PROVIDERS”

Majority of Europeans agree that there is enough choice and variety in the offers provided.



# FIXED INTERNET: WHAT IS MOST IMPORTANT WHEN CHOOSING A NEW PROVIDER?

## TOP DRIVERS – 40%+

- monthly price to be paid **(59%)**
- reliability of connection **(49%)**
- (upload/download) speed of internet **(45%)**
- quality and range of the Wi-Fi signal **(43%)**

## IMPORTANT DRIVERS 20% - 40%

- good customer service **(37%)**
- network security **(36%)**
- free activation/installation **(30%)**
- offers the tariff plan that best suits my needs **(30%)**
- benefits for loyal customers **(26%)**
- special offer **(24%)**
- flexible packs that I can personalize to suit my needs **(23%)**

## LESS IMPORTANT DRIVERS <20%

- download volume included **(19%)**
- possibility of adjusting my subscription myself **(18%)**
- availability of environmentally friendly fibre optics **(16%)**
- advice from friends/family, positive experiences from them **(12%)**
- same provider as other telecom services **(10%)**
- sustainability measures taken by the provider **(10%)**
- this provider offers fully digital subscriptions **(10%)**
- accessibility of shops **(10%)**

# FIXED INTERNET: SWITCHING BEHAVIOUR

Most Europeans agree that switching provider is simple and quick and nearly 4 out of 10 already switched providers for fixed internet in the past 5 years.

## SWITCHING PROVIDERS IS SIMPLE AND QUICK

58%

**AGREE**  
(totally agree + somewhat agree)

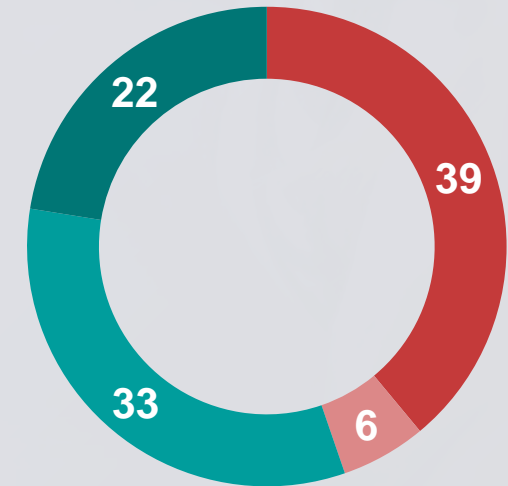
25%

**NEITHER AGREE, NOR DISAGREE**

17%

**DISAGREE**  
(totally disagree + somewhat disagree)

## SWITCHED FROM PROVIDER FOR FIXED INTERNET IN PAST 5 YEARS



- Yes, I already switched provider in the past 5 years
- No, but planning to switch provider in the next 6 months
- No, I haven't switched provider in the past 5 years
- No, I have never switched provider

# MOBILE PLAN: WHAT IS MOST IMPORTANT WHEN CHOOSING A NEW PROVIDER?

## TOP DRIVERS – 40%+

- monthly price to be paid **(60%)**
- quality of the mobile network **(53%)**
- mobile network coverage **(47%)**

## IMPORTANT DRIVERS 20% - 40%

- good customer service **(38%)**
- mobile data volume **(37%)**
- offers the tariff plan that best suits my needs **(36%)**
- 5G coverage **(30%)**
- benefits for loyal customers **(29%)**
- special offer **(25%)**
- possibility of making adjustments to my subscription myself **(22%)**

## LESS IMPORTANT DRIVERS <20%

- tariffs/options for international calling or roaming **(20%)**
- option to buy smartphone together with my subscription for a good price **(18%)**
- advice from friends/family, positive experiences from friends/family **(15%)**
- extra options for mobile (e.g. setting a data limit, call forwarding, extra voicemail options, etc.) **(14%)**
- sustainability measures taken by the provider **(11%)**
- same provider as other telecom services **(11%)**
- accessibility of shops **(10%)**
- this provider offers fully digital subscriptions **(10%)**

# MOBILE PLAN: SWITCHING BEHAVIOUR

More Europeans switched provider for their mobile plan compared to fixed internet, more than 4 out of 10 also indicate having already switched providers for mobile in the past 5 years.

## SWITCHING PROVIDERS IS SIMPLE AND QUICK

58%

**AGREE**  
(totally agree + somewhat agree)

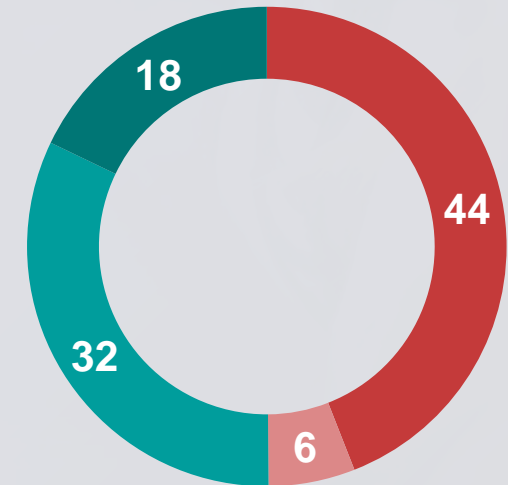
25%

**NEITHER AGREE, NOR DISAGREE**

17%

**DISAGREE**  
(totally disagree + somewhat disagree)

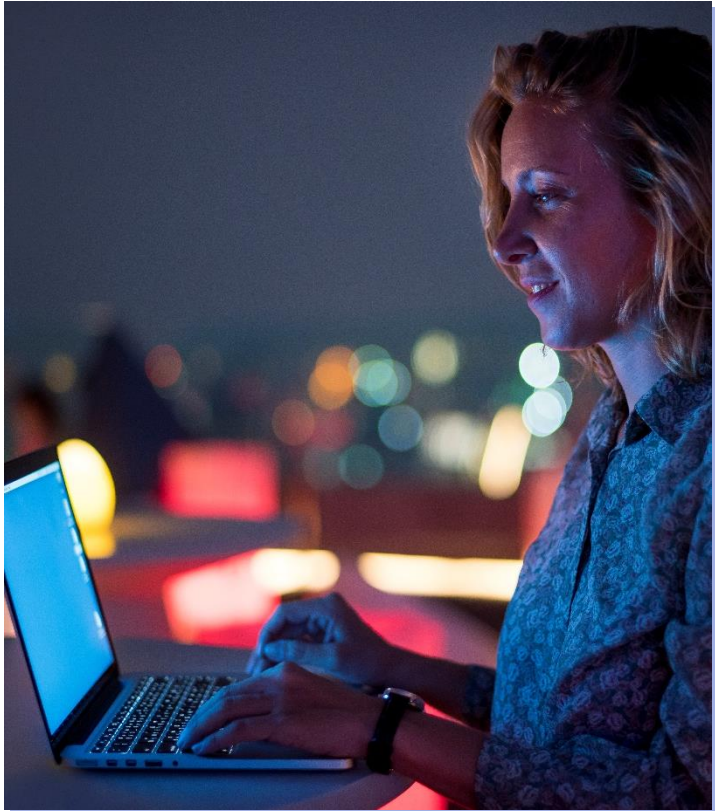
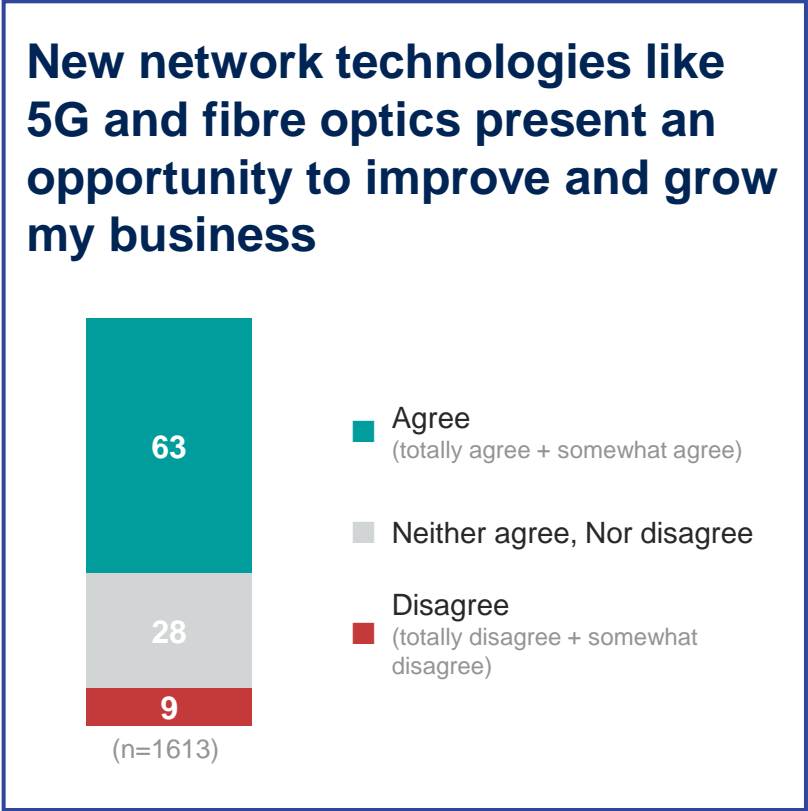
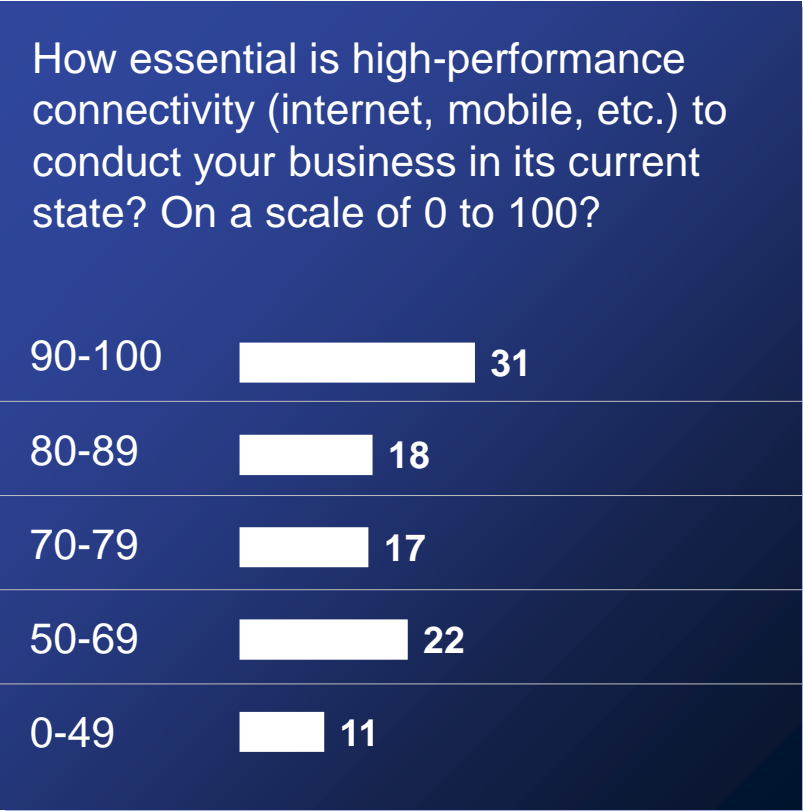
## SWITCHED FROM PROVIDER FOR MOBILE PLAN IN PAST 5 YEARS



- Yes, I already switched provider in the past 5 years
- No, but planning to switch provider in the next 6 months
- No, I haven't switched provider in the past 5 years
- No, I have never switched provider

# ROLE OF HIGH-PERFORMANCE CONNECTIVITY FOR BUSINESSES

Majority of business owners find high-performance connectivity important, as more than half gives a score of 80+. Most also agree that new network technologies, such as 5G and fibre present an opportunity to improve and grow their business.



Base: Self-employed and small business owners (<10 employees) (n=1613)  
 Question: B1. How essential is high performance connectivity (internet, mobile, etc.) to conduct your business in its current state?  
 B2. To what extent do you agree with the following statement: "New network technologies like 5G [PROG: POP-UP "fifth generation of cellular networks, offering faster speeds, lower latency and greater capacity"] and fibre optics [PROG: POP-UP "thin flexible strands of glass/plastic that use light to transmit data over long distances at high speeds"] present an opportunity to improve and grow my business"

# HOW DO EUROPEANS CHOOSE THEIR TELECOM PROVIDER?

- ✓ Is there sufficient choice?
- ✓ What is important when choosing providers?
- ✓ How do Europeans feel about switching providers?

## 1

### EUROPEAN CONSUMERS GENERALLY FEEL THERE IS SUFFICIENT CHOICE AND COMPETITION IN THE TELECOM MARKET

More than 7 out of 10 agree there are enough providers to choose from, however there are differences depending on the country of residence.

## 2

### PRICE REMAINS A KEY DRIVER FOR CHOOSING A PROVIDER FOR BOTH FIXED INTERNET AND MOBILE

Network reliability and download speed is also important when considering fixed internet provider, and network coverage when considering a provider for mobile plan. Less important drivers include sustainability measures, fully digital subscriptions or shop accessibility.

## 3

### MOST AGREE SWITCHING PROVIDERS IS EASY, BUT A MAJORITY DOES NOT FREQUENTLY SWITCH PROVIDERS

58% agree that switching is quick and easy and about 4 out of 10 have already switched providers in the past 5 years for either mobile or fixed internet.

# PRICE TRENDS AND AFFORDABILITY

# 2.3

## 2. Results

# HOW DO EUROPEANS FEEL ABOUT PRICE TRENDS IN RECENT YEARS?

**1** ARE TELECOM SERVICES STILL AFFORDABLE?

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**2** WHO SHOULD BE RESPONSIBLE FOR AFFORDABLE TELECOM SERVICES?

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**3** ARE EUROPEANS WILLING TO ACCEPT LOWER QUALITY FOR MORE AFFORDABLE SERVICES?

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85%

Thinks that telecom services (mobile phone, internet, etc.) are a basic need, and something that everyone should have access to

# RESPONSIBILITY AFFORDABLE ACCESS CONNECTIVITY SERVICES

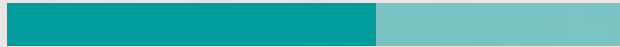
Europeans believe providing affordable access is a shared responsibility of the government, telecommunications providers and technology and social media companies.



# “PRICE FOR MY TELECOM SERVICES IS GOOD VALUE FOR MONEY”

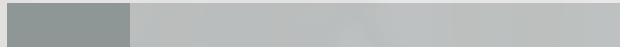
Most believe the price they pay for their telecom services is good value for money. About 1 in 5 disagrees.

**60%**



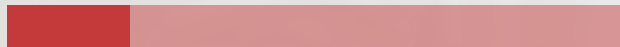
**AGREE** (totally agree + somewhat agree)

**20%**



**NEITHER AGREE, NOR DISAGREE**

**20%**



**DISAGREE** (totally disagree + somewhat disagree)

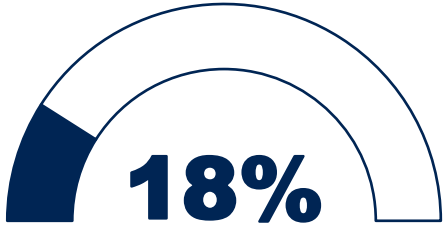


# PERCEIVED PRICE INCREASE OF TELECOM PRODUCTS IN PAST 3 YEARS

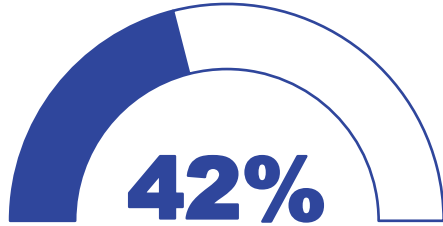
Most claim price of their telecom products has increased over the past 3 years.



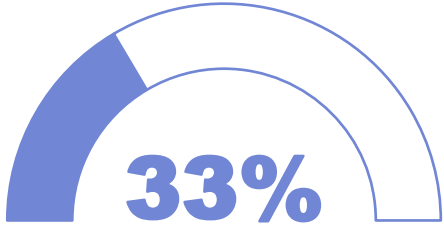
**SUBSTANTIALLY INCREASED**



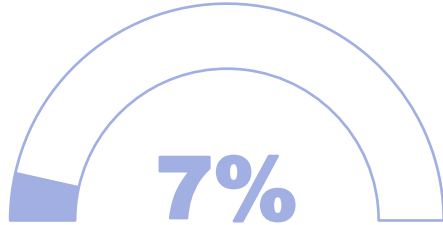
**SLIGHTLY INCREASED**



**STAYED ABOUT THE SAME**

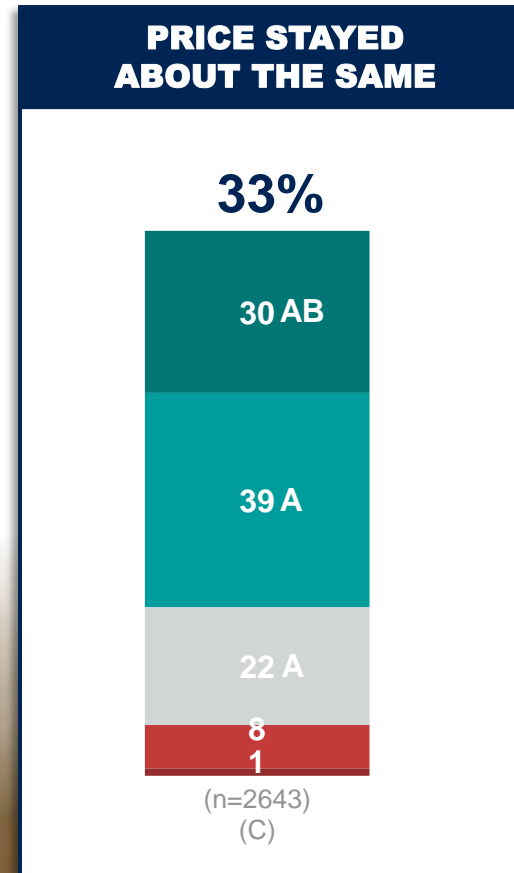
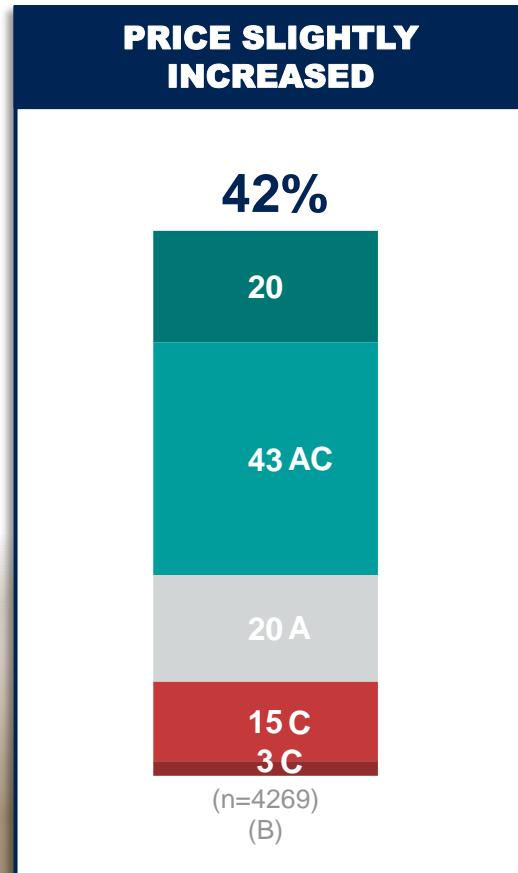
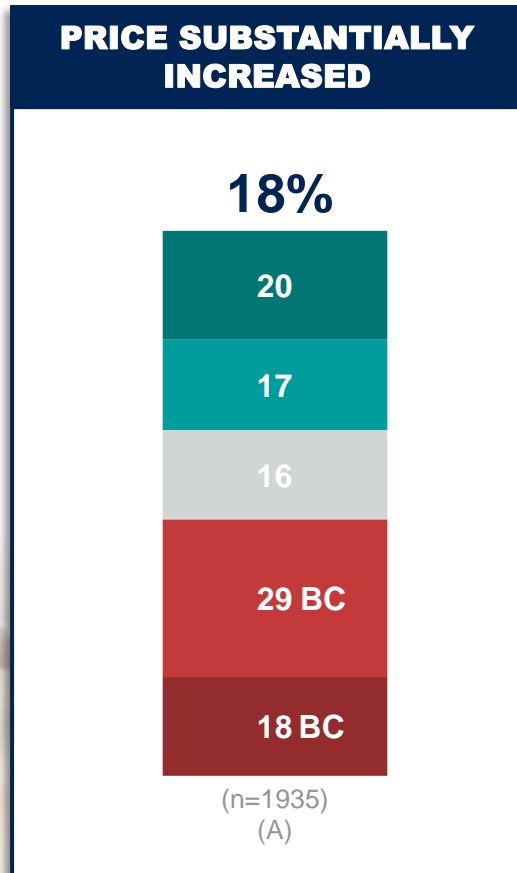


**DECREASED**  
(substantially decreased + slightly decreased)



# VALUE FOR MONEY – BY PERCEIVED PRICE INCREASE

The higher the perceived price increase, the more dissatisfied people are about the value for money of their telecom services.

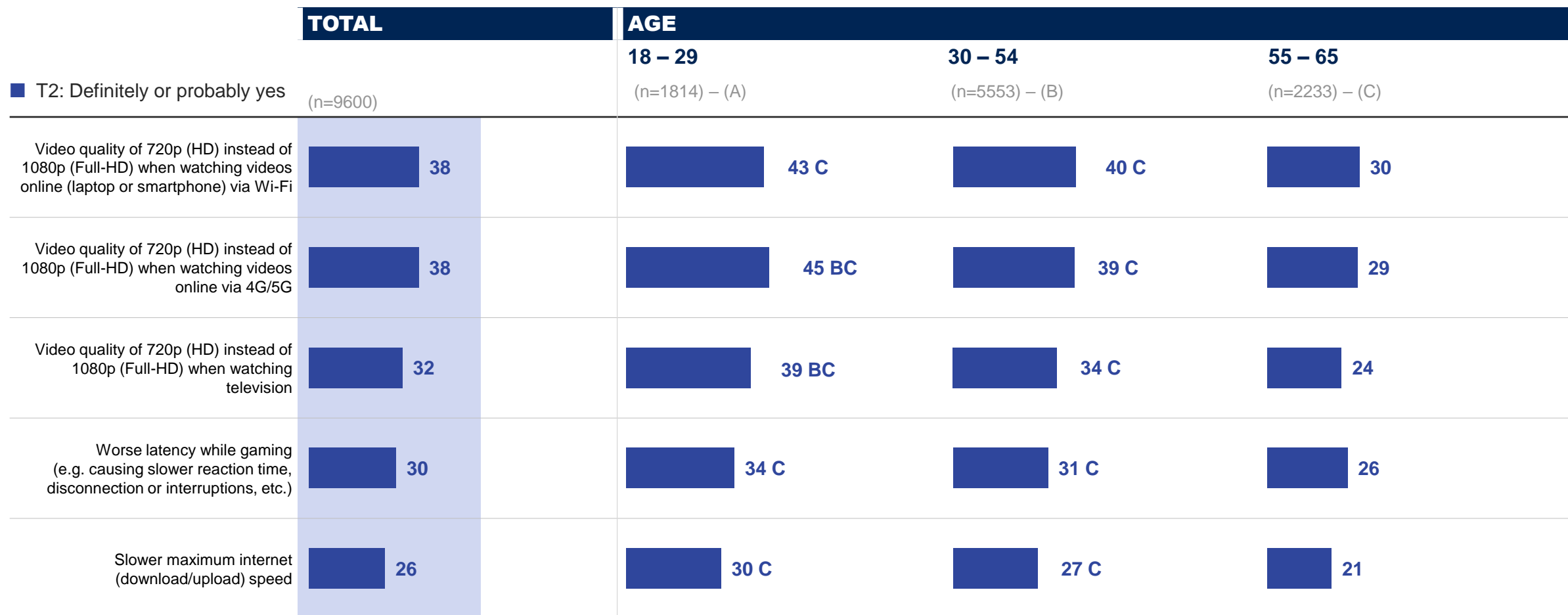


**“Price for my telecom services is good value for money”**

- Totally agree
- Somewhat agree
- Neutral
- Somewhat disagree
- Totally disagree

## WOULD EUROPEANS ACCEPT LOWER QUALITY IN EXCHANGE FOR A LOWER PRICE?

About 1 in 3 are open to lower video quality in exchange for a lower price. Europeans are least open to slower maximum internet speed. In general, younger people are more open to giving up quality in exchange for a more affordable price.



# HOW DO EUROPEANS FEEL ABOUT PRICE TRENDS IN RECENT YEARS?

- ✓ Are telecom services still affordable?
- ✓ Who should be responsible for affordable telecom services?
- ✓ Are Europeans willing to accept lower quality for more affordable services?

## 1

### TELECOM AFFORDABILITY REMAINS A KEY FACTOR DESPITE THE PERCEIVED VALUE OF SERVICES

While 6 out of 10 think the services offer good value, 6 out of 10 also claim to have seen price increases recently. Mainly people who experienced significant price increases are dissatisfied.

## 2

### TELECOM SERVICES ARE A BASIC NEED, SAFEGUARDING ITS AFFORDABILITY IS SEEN AS A SHARED RESPONSIBILITY OF (TELECOM AND TECH) COMPANIES AND THE GOVERNMENT

85% of Europeans believe telecom services are a basic need. When asked for responsibility to make telecom services affordable, people indicate that both telecom providers, the government and technology companies should be responsible.

## 3

### VIDEO QUALITY TRADEOFFS FOR LOWER PRICE HAVE MODERATE APPEAL, LESS APPEAL FOR SLOWER INTERNET SPEED

About 1 in 3 would accept lower video quality to reduce costs. Willingness is higher amongst younger demographics. Only few are willing to accept slower internet speed for affordability.

# DATA SECURITY ATTITUDE & BEHAVIOUR

# 2.4

## 2. Results

# WHAT DO EUROPEANS THINK ABOUT THE SECURITY OF THEIR PERSONAL DATA?

**1** ARE EUROPEANS CONCERNED ABOUT THE SECURITY OF THEIR PERSONAL DATA?

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**2** DO EUROPEANS TRUST THEIR TELECOMMUNICATIONS PROVIDER IN TERMS OF DATA SECURITY?

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**3** WHO SHOULD BE RESPONSIBLE FOR THE SECURITY OF PERSONAL DATA?

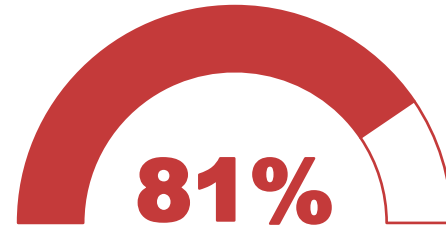
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**4** HOW DO EUROPEANS PROTECT THEIR DATA?

# CONCERNED ABOUT SECURITY OF PERSONAL DATA

Most are concerned about the security of their personal data.

**CONCERNED**  
(very concerned + concerned  
+ fairly concerned)



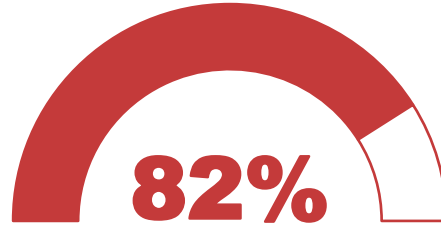
**UNCONCERNED**  
(not at all concerned  
+ fairly unconcerned)



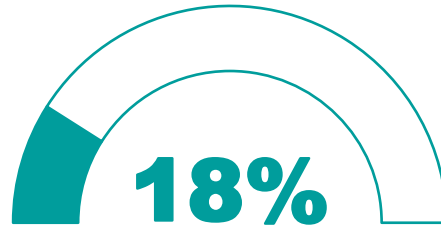
# CONCERNED ABOUT CHILDREN SMARTPHONE USAGE

Most parents are concerned about the smartphone usage of their children.

**CONCERNED**  
(very concerned + concerned  
+ fairly concerned)



**UNCONCERNED**  
(not at all concerned  
+ fairly unconcerned)




# DATA SECURITY AND INFORMATION RECEIVED BY PROVIDER

Majority of customers with fixed internet and mobile at the same provider believe their data are secure and that their provider regularly informs them about security updates. Mobile only and fixed internet customers less often believe their data is secure or that they receive regular updates on security by their provider.

## CUSTOMER AT PROVIDER FOR

■ T2: Definitely or rather agree

 **FIXED INTERNET & MOBILE**  
(n=5358) – (A)

 **MOBILE ONLY**  
(n=4242) – (B)

 **FIXED INTERNET ONLY**  
(n=4242) – (C)

My data are secure

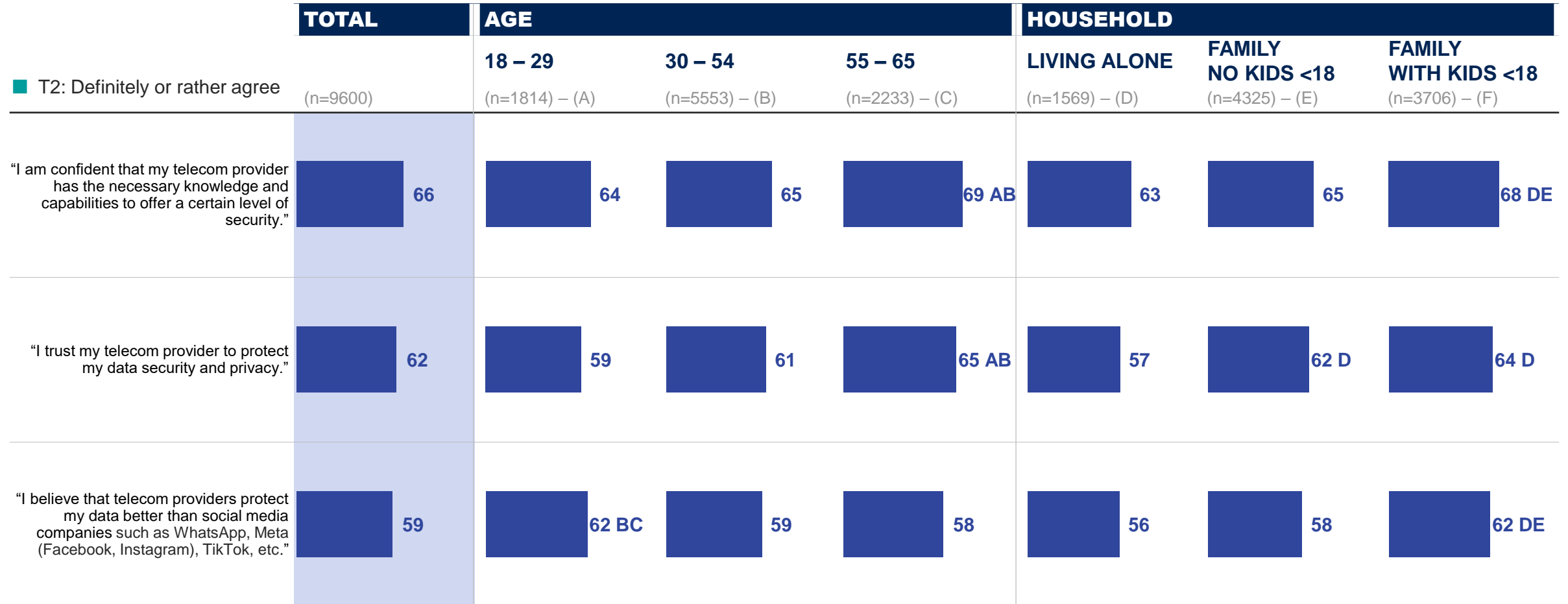


My provider informs me about security updates on a regular basis



# TRUST IN PROVIDERS

Majority is confident and trusts their provider in terms of security and data protection. Most also have more trust in their telecom provider compared to messaging apps companies.



# FEEL ABOUT RESPONSIBILITY FOR DATA SECURITY

Most believe that data security is a shared responsibility between the user and the companies storing the data.



# WHAT SECURITY MEASURES DO YOU TAKE TO PROTECT YOUR DATA?

## TOP 5 MEASURES TAKEN

**59%**



I don't share my passwords with anyone

**48%**



I limit the amount of personal information I share online on social media

**48%**



I regularly update my devices and applications (smartphone, computer, etc.)

**45%**



I use strong and unique passwords

**45%**



My Wi-Fi is secured with a strong password

# WHAT DO EUROPEANS THINK ABOUT THE SECURITY OF THEIR PERSONAL DATA?

- ✓ Are Europeans concerned about the security of their personal data?
- ✓ Do Europeans trust their telecommunications provider in terms of data security?
- ✓ Who should be responsible for the security of personal data?
- ✓ How do Europeans protect their data?

## 1

### EUROPEANS ARE CONCERNED ABOUT THEIR DATA SECURITY

81% of Europeans are concerned about their security of personal data. 82% are also concerned about smartphone usage of their children.

## 2

### TRUST IS HIGHER IN TELECOM PROVIDERS COMPARED TO SOCIAL MEDIA COMPANIES

59% of Europeans believe that telecom providers protect data better than social media companies such as WhatsApp, Meta and TikTok.

## 3

### MOST FIND SECURING THEIR DATA A SHARED RESPONSIBILITY BETWEEN THE COMPANY AND USER

49% believe that both they and the company using or storing personal data as well share responsibility for ensuring the security of their personal data.

## 4

### EUROPEANS' BEHAVIOUR IS NOT IN LINE WITH THEIR SECURITY CONCERNS: MANY STILL SHARE THEIR PASSWORD OR DON'T USE STRONG PASSWORDS

59% don't share their password(s) with anyone. Only 45% indicate using strong and unique passwords.

# TELECOM PROVIDERS' SUSTAINABILITY ROLE

# 2.5

## 2. Results

# WHAT ROLE SHOULD SUSTAINABILITY PLAY FOR TELECOM PROVIDERS?

**1** DO EUROPEANS BELIEVE TELECOMMUNICATION PROVIDERS SHOULD BE SUSTAINABLE?

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**2** WOULD EUROPEANS ACCEPT LOWER VIDEO QUALITY TO REDUCE ENERGY CONSUMPTION?

---

**3** HOW KNOWLEDGEABLE ARE EUROPEANS ABOUT SUSTAINABILITY OF NEXT-GEN TECHNOLOGIES SUCH AS FIBRE AND 5G?

# “DO YOU FIND IT IMPORTANT THAT YOUR PROVIDER IS SUSTAINABLE?”

Sustainability of their provider is important for Europeans.

**82%**



**IMPORTANT** (very important + important+ somewhat important)

**18%**



**NOT IMPORTANT** (not at all important + somewhat unimportant)



# CLAIMED IMPORTANCE SUSTAINABILITY

Large majority of Europeans find it important that their provider is sustainable ...

**82%**

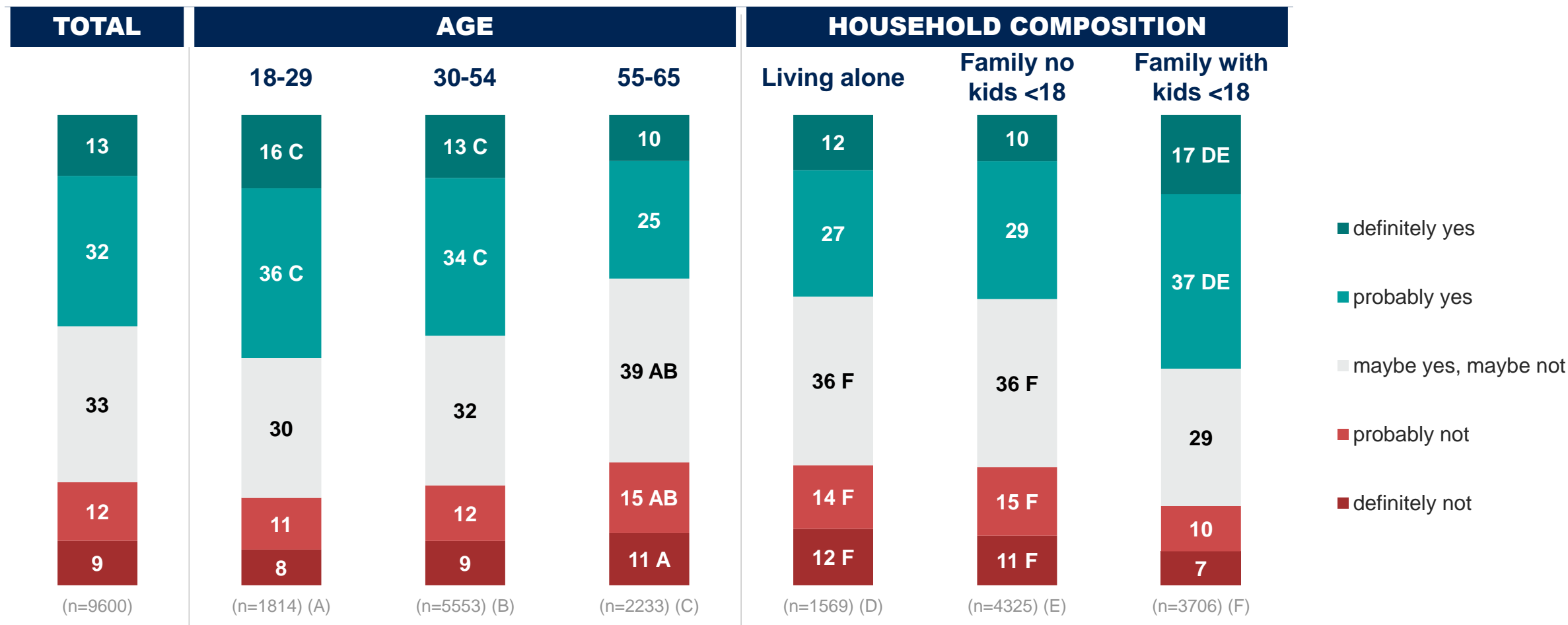
**VS**

... however, only 1 in 10 mentions sustainability as a choice driver when considering a provider for fixed internet

**10%**

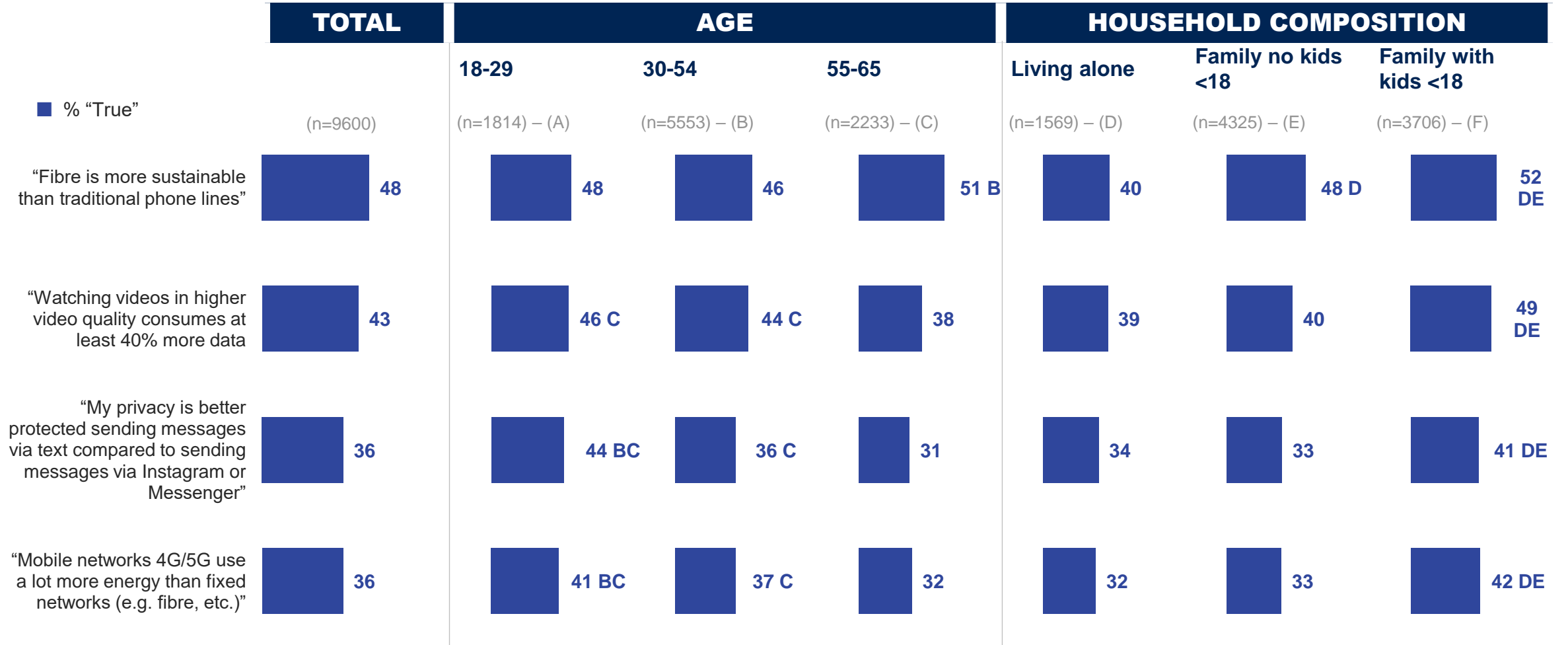
# ARE PEOPLE WILLING TO ACCEPT LOWER VIDEO QUALITY IN EXCHANGE FOR HIGHER SUSTAINABILITY?

Nearly half of Europeans is open to accepting lower video quality in exchange for higher sustainability. Younger people aged 18-54 are more open compared to those aged 55+.



# KNOWLEDGE ABOUT SUSTAINABLE TECHNOLOGY

Europeans are not very knowledgeable about sustainability of new technologies such as fibre and data consumption of watching videos in higher quality.



# WHAT ROLE SHOULD SUSTAINABILITY PLAY FOR TELECOM PROVIDERS?

- ✓ Do Europeans believe providers should be sustainable?
- ✓ Would Europeans accept a lower video quality to reduce energy consumption?
- ✓ How knowledgeable are Europeans about sustainability of next-gen technologies such as fibre and 5G?

1

## SUSTAINABILITY IS PERCEIVED AS IMPORTANT, HOWEVER MOST DON'T CONSIDER IT WHEN CHOOSING THEIR PROVIDER

82% of Europeans find it important that their provider is sustainable, however only 1 in 10 considers sustainability when choosing their telecom provider.

2

## LOWER VIDEO QUALITY TO LIMIT ENERGY CONSUMPTION HAS MODERATE APPEAL

About 4 out of 10 claim to be willing to accept lower video quality if that would lower energy consumption. Appeal is higher amongst youngsters.

3

## MOST PEOPLE ARE UNAWARE OF THE ENVIRONMENTAL BENEFIT OF NEXT-GEN TECHNOLOGY

Only 48% believe fibre is more sustainable compared to traditional phone lines.

# THANK YOU!

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Research Consultant

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**GAME CHANGERS**

