

COVID-19 and the connected telco consumer: How telecom operators can reconnect with customers and emerge stronger from the pandemic

COVID-19 has shown very clearly the critical role that telcos play in our society and economy. While the pandemic has been a profound societal and economic crisis, it has reinforced the importance of connectivity as a critical part of a functioning society and everyday life. The widespread and accelerated shift to virtual models – from the world of work to how we educate the next generations – has driven up demand for connectivity services on an unprecedented scale.

In this research note, we explore whether consumers' needs and demands for connectivity during this challenging time are actually being met. How is the crisis affecting consumers' purchase criteria? What are the changes that consumers expect from their operators' online and offline sales and service experience as a result of the pandemic?

We surveyed over 6,300 consumers who use both mobile and fixed broadband services. The survey covered nine countries – France, Germany, Spain, Belgium, the Netherlands, Sweden, Norway, the UK, and the US.

Key findings

This research note identifies and focuses on the following key consumer trends:

- Consumers' connectivity needs are evolving due to the crisis. Fewer than half (48%) of consumers feel that the connectivity services that they have today adequately meet their remote work and education needs. Further, network speed and flexibility (the ability to change or customize plans and services) will play an increasingly important role in consumers' choice of operator in the new normal.
- Consumers are open to exploring new online services to minimize the risks associated with human contact today, but face challenges when using operators' digital channels. For instance, nearly a third (32%) of consumers find it difficult to use their operator's online store or app to buy a device or plan, and 41% find it easier to go to a store to resolve issues rather than using online customer care channels.
- While footfalls in physical stores are not likely to revert to pre-COVID levels, they will remain an important channel for consumers. However, consumers expect faster service and increased automation to minimize exposure and human contact when in the store.

The research note also outlines actions that telecom organizations can take to respond to consumer trends over the short-term horizon.

Telco operators need to step-up to meet consumers' requirements in the new normal

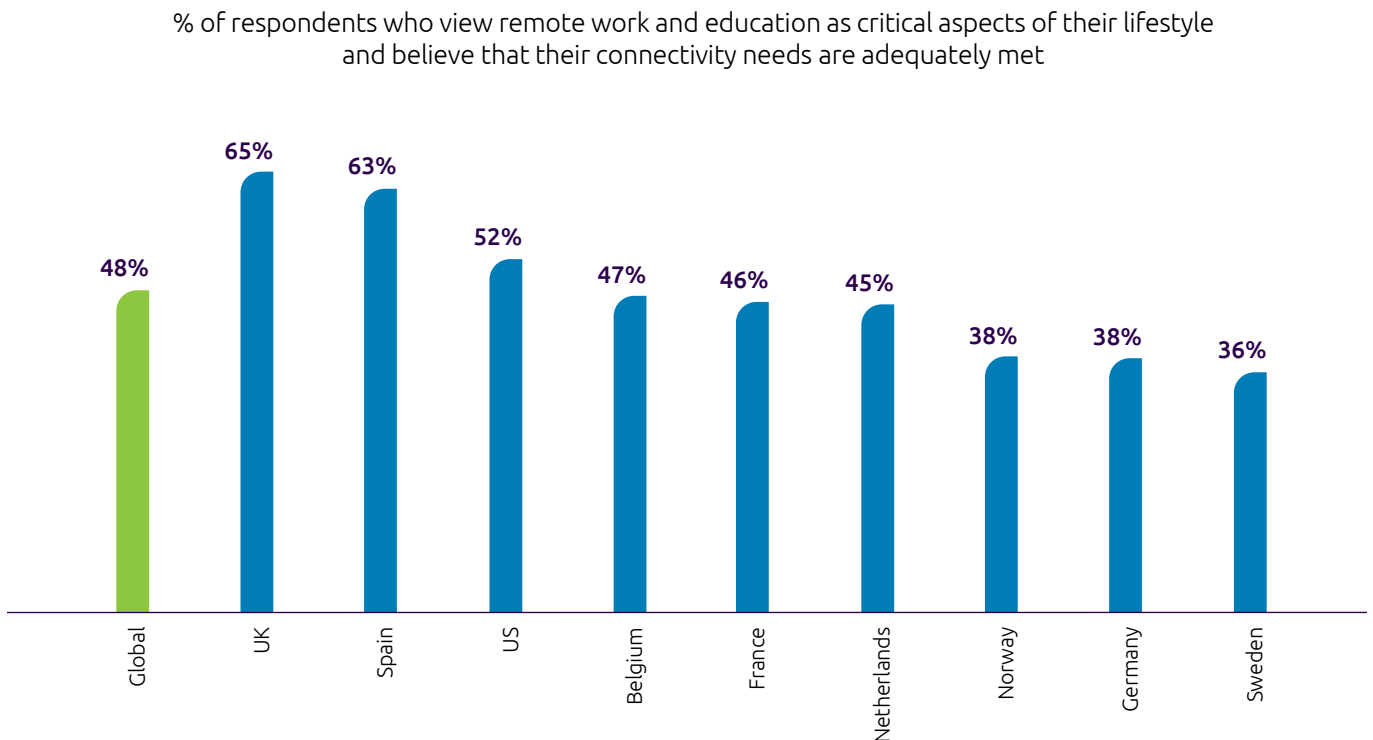
Consumers have unmet connectivity needs in the new normal

The COVID-19 crisis has underscored the need for reliable connectivity like never before. As many as 63% of consumers in our survey believe that, in the wake of the crisis, connectivity should be treated as an essential service that is affordable and easily accessible to everyone. UN Secretary-General António Guterres highlights the critical role played by connectivity in the current environment when he says, *"Digital connectivity is indispensable, both to overcome the pandemic and for a sustainable and inclusive recovery. Technology is enabling the lifesaving work of health-care providers, allowing businesses to operate remotely, educating our children and connecting us with friends and family."*¹

Yet, even as remote work and education become critical aspects of their lifestyle in the new normal, fewer than half (48%) of consumers in our survey feel that the connectivity services that they currently have are adequate to meet their needs (see Figure 1). The variation across countries can be seen as a reflection of the differing levels of customer expectations across countries.

In general, the pandemic has resulted in multiple members of a household sharing a residential internet connection for data-intensive applications, when previously they were often using enterprise-grade office and school networks. The increased traffic on household connections has strained last-mile services and caused congestion and slower network speeds. The need for VPNs, which has surged during the pandemic, as well as other security features used when working from home, can also slow connections. Further, WiFi configurations that may have previously provided sufficient coverage for home use may not adequately support new usage patterns. Telcos therefore need to take a holistic view of customers' connectivity needs and challenges if they are to help them adapt effectively to the new normal.

Figure 1: Consumers believe that their increased needs for connectivity services due to COVID are not adequately met



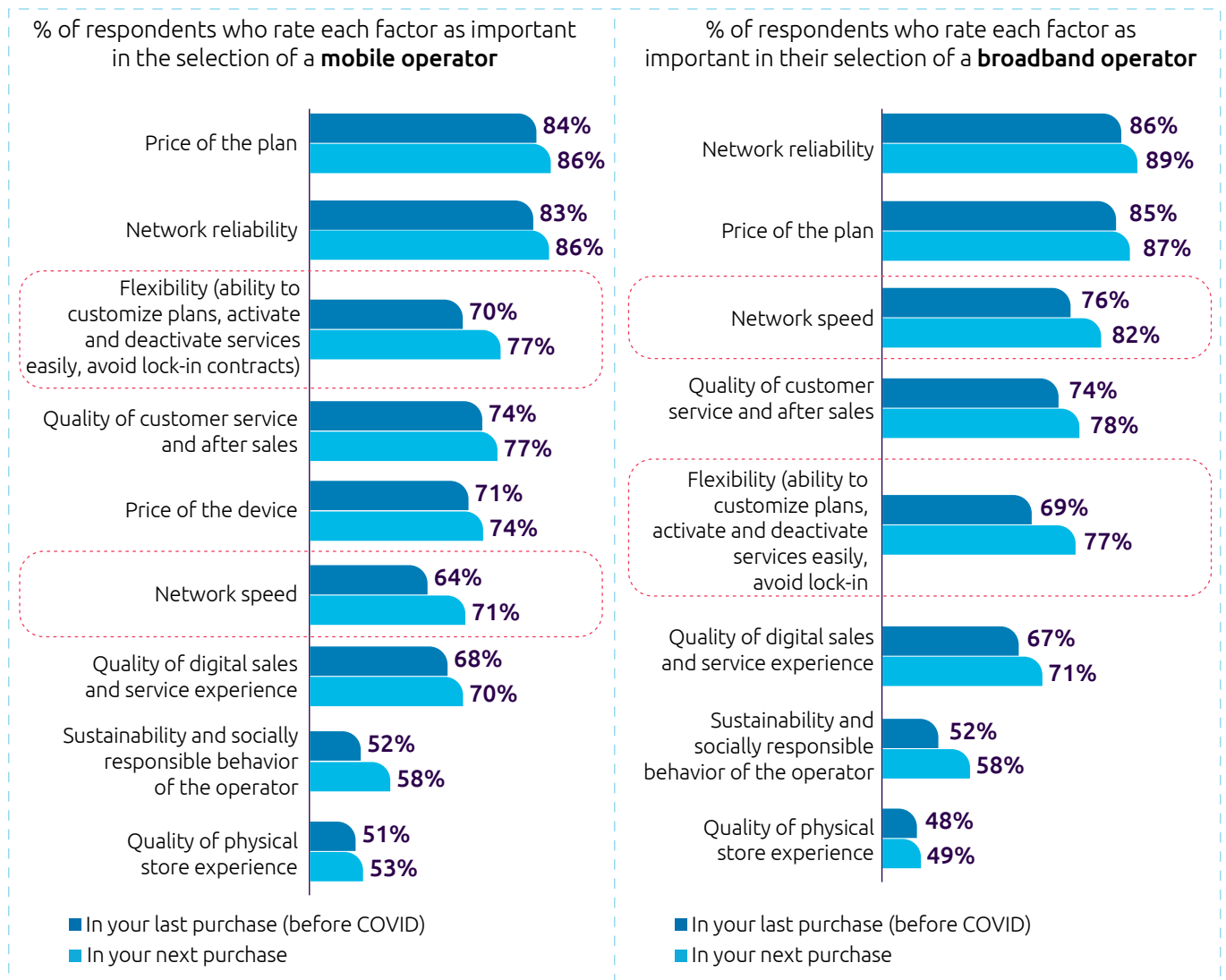
Source: Capgemini Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers with access to mobile and broadband connections.

Flexibility and network speed are increasingly influencing customers' choice of operator in the new normal

COVID-19 is impacting consumers' purchase criteria. While "network reliability" and "price" remain the top-two criteria influencing consumers' choice of operator, "flexibility" has emerged as an increasingly important requirement in the new normal. By flexibility, we mean the ability to customize

plans, activate and deactivate services easily, and avoid lock-in contracts. Our survey found that flexibility registered the highest increase in importance for consumers through the course of the crisis (see Figure 2). "Network speed" has similarly shown a strong increase in importance for consumers over the course of the crisis. This is not surprising given that consumers are more likely to have experienced issues with slower connectivity during the crisis than in the past, due to the significant increase in internet traffic.

Figure 2: Consumers increasingly value flexibility and network speed while opting for connectivity services in the new normal



Source: Capgemini Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers with access to mobile and broadband connections.

However, telecom organizations are not fully in sync with customers' need for increased flexibility. Only 37% of mobile subscribers and 33% of broadband subscribers in our survey say that their operators proactively provided them with the flexibility to change their plans easily during the COVID-19 crisis.

Consumers are paying attention to operators' sustainability credentials

The COVID-19 crisis has heightened consumers' focus on sustainability. More consumers are attuned to, and value, operators' sustainability credentials. Nearly six in 10 consumers (58%) see sustainability and socially responsible behavior as an important criteria in their selection of operators, up from 52% before the crisis. Our recent survey on the post-COVID new normal found that operators are aware of the growing importance of sustainability: 45% of organizations in the telecom, media, and high-tech sectors view enhancing their sustainability efforts as their top priority in the next 6–12 months, which includes a focus on social responsibility.²

Action points for organizations

Introduce targeted solutions to address customer needs

- **Proactively address customers' in-home coverage issues.** Telcos should take proactive steps to assess customers' in-home coverage levels and offer solutions that help cover shadow areas or dead spots. Potential solutions include WiFi extenders to boost home WiFi coverage and "Voice over WiFi" (VoWiFi) services to compensate for poor mobile signal strength indoors. Such offers can be targeted at residential customers as well as enterprises looking for solutions to improve employee productivity while working from home. Vodafone, for instance, provides a service offering for its home broadband customers in Europe that uses a network of small WiFi extenders to improve in-home WiFi coverage. The cloud-based service uses AI algorithms to learn and adjust automatically to changes in the home network, such as interference from other devices.³
- **Offer a comprehensive suite of remote work solutions.** Seamless remote working requires more than reliable connectivity. Telcos should therefore take a holistic view of customers' work-from-home needs and offer solutions that combine connectivity with devices, collaboration tools, and security services (see Figure 3). US-based operator Cox Communications, for instance, has introduced "Work-at-Home" solutions that provide

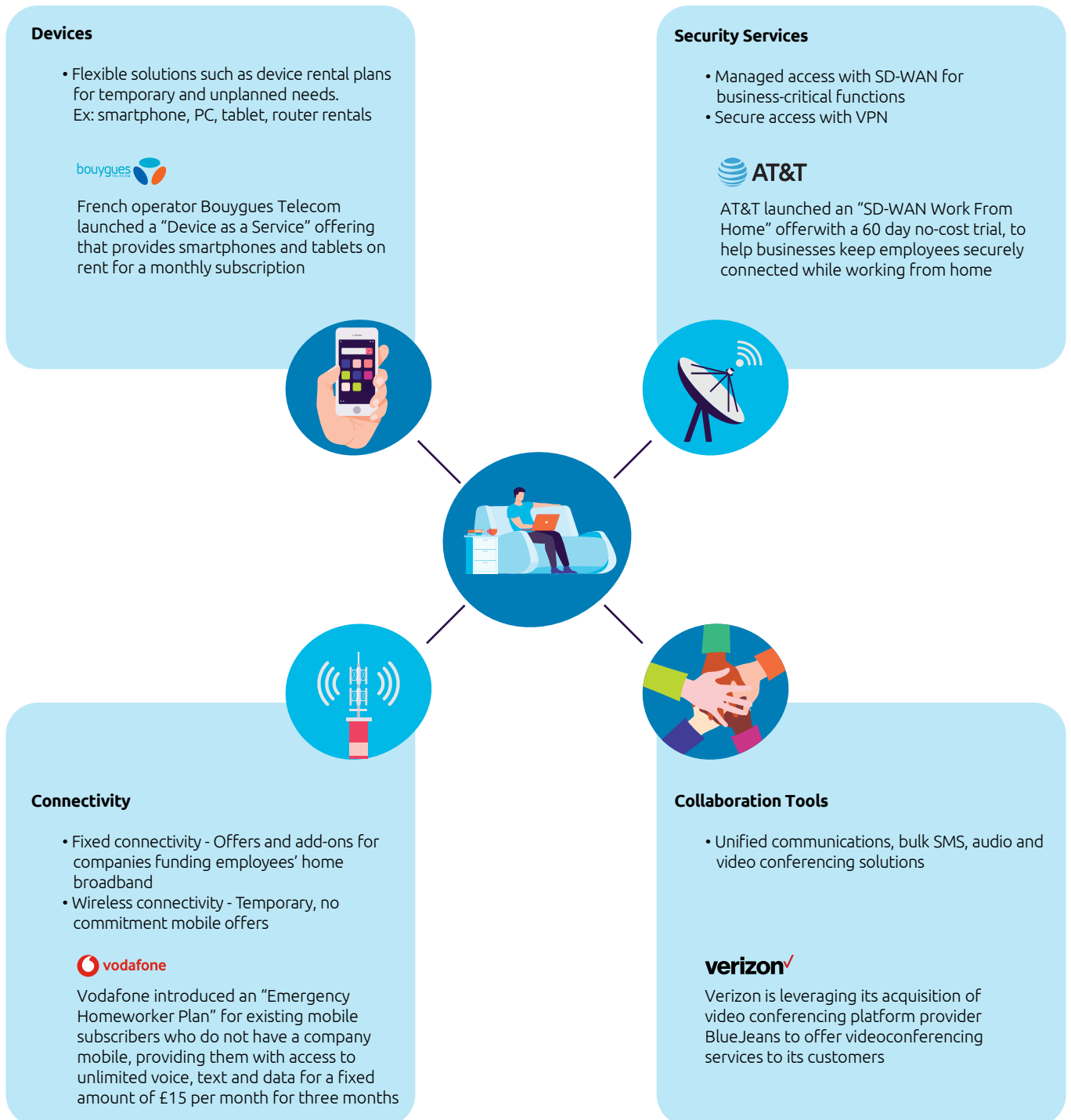
enterprise-grade connectivity at home combined with security services, productivity solutions, and remote troubleshooting support. Elaborating on the solutions, Steve Rowley, executive vice president at Cox Business, says, "WiFi, congestion and security issues have been a concern of many companies as more employees are having to work from home. Cox Business Work-at-Home solutions separate work and home connectivity, giving employees enterprise-grade connectivity and WiFi to promote more productive employees."⁴

- **Enhance the breadth of customer support services.** With customers' increased reliance on their network infrastructure, comes the increased likelihood of new issues such as congestion and slower speeds, problems with insufficient WiFi coverage, and security breaches. Telcos should therefore augment their existing customer support services to address a wider range of customer pain points. The application of advanced analytics can help here by enabling telcos to detect issues such as dropped sessions and proactively propose solutions to help customers address these issues.
- **Increase support for vulnerable customers.** Given the economic impact of the pandemic, it is critical that telcos try to ensure that the digital divide does not widen. In this regard, telcos should consider measures such as upgrading network speeds, providing unmetered access to educational resources, or removing data limits on mobile and broadband usage for vulnerable segments such as customers from low-income households or the elderly. Swedish operator Telia, for instance, offers 100 GB of data free of charge for one year to all its subscribers who are above the age of 65 to help them stay connected and cope with the crisis better.

Provide increased flexibility to consumers

- **Simplify rules for migrating to new plans and services.** During times of economic uncertainty, it is especially critical that consumers have the flexibility to adjust their spending on connectivity as they see fit. Operators should therefore enable customers to customize plans and add or remove services based on their needs. They should also expand the availability of short-term or no-contract plans so that customers have the flexibility to explore new options if needed. Orange Poland, for instance, offers a contract-free service called Orange Flex that enables customers to switch to a new mobile operator or change their data bundles at any time of their choosing.⁶ UK-based Virgin Media, on the other hand, provides short-term, 30-day broadband contracts as an alternative to the usual longer term 12-month or 18-month options.⁷ Operators should consider proactively reaching out to customers facing financial constraints with such flexible offers. In doing so, they stand to build stronger relationships with customers, which can translate to increased customer loyalty in the long term.

Figure 3: Key components of a remote work solution



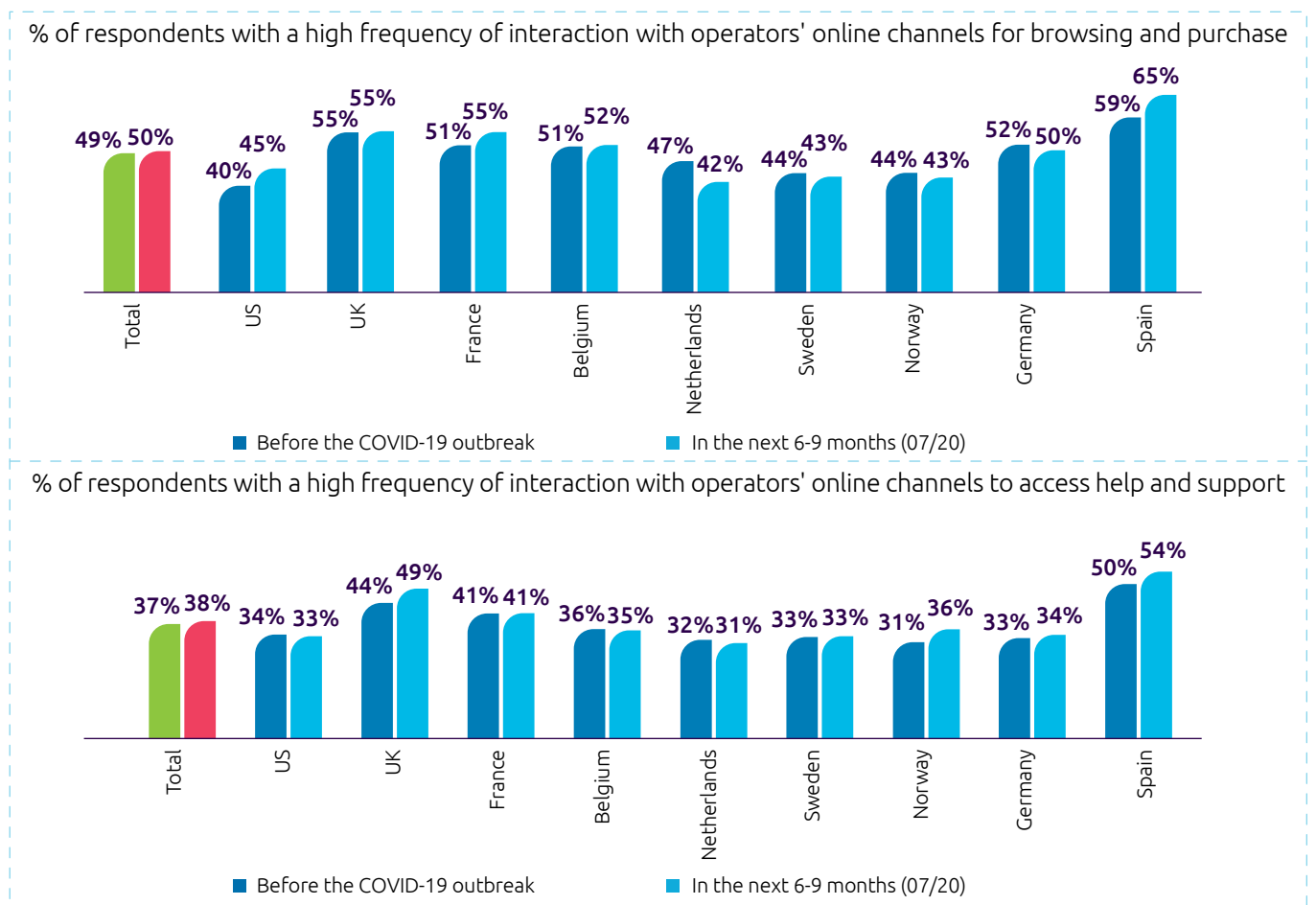
Source: Capgemini Invent; Alertify, "Bouygues Telecom Introduced Device As A Service To B2B Portfolio," June 2020; AT&T, "SD-WAN Work From Home," June 2020; Channelnomics, "Verizon Snaps Up BlueJeans for Videoconferencing," April 17, 2020; Vodafone UK News Centre, "Keeping UK businesses and workforces connected," March 2020.

Digital channels are more critical than ever, but the lack of a seamless digital customer experience is holding back adoption

Operators' online channels have emerged as key customer touchpoints in recent years. We found that 49% of consumers used operators' online channels frequently pre-COVID to browse or purchase devices and plans, and 37% used them frequently to access help and support. In the next

6–9 months, the level of interaction with operators' online channels is expected to remain largely unchanged (see Figure 4). However, there are geographical variations in this trend. Consumers in the US and Spain, for instance, expect to use operators' online channels more frequently in the next 6–9 months, compared to consumers in countries such as Germany. This variation can be explained in part by the differing impact of the crisis in these countries. Consumers in countries that have been impacted more, such as the US and Spain, may be forced to rely more on digital channels, driving higher projected usage of these channels.

Figure 4: Impact of COVID-19 on the adoption of digital channels



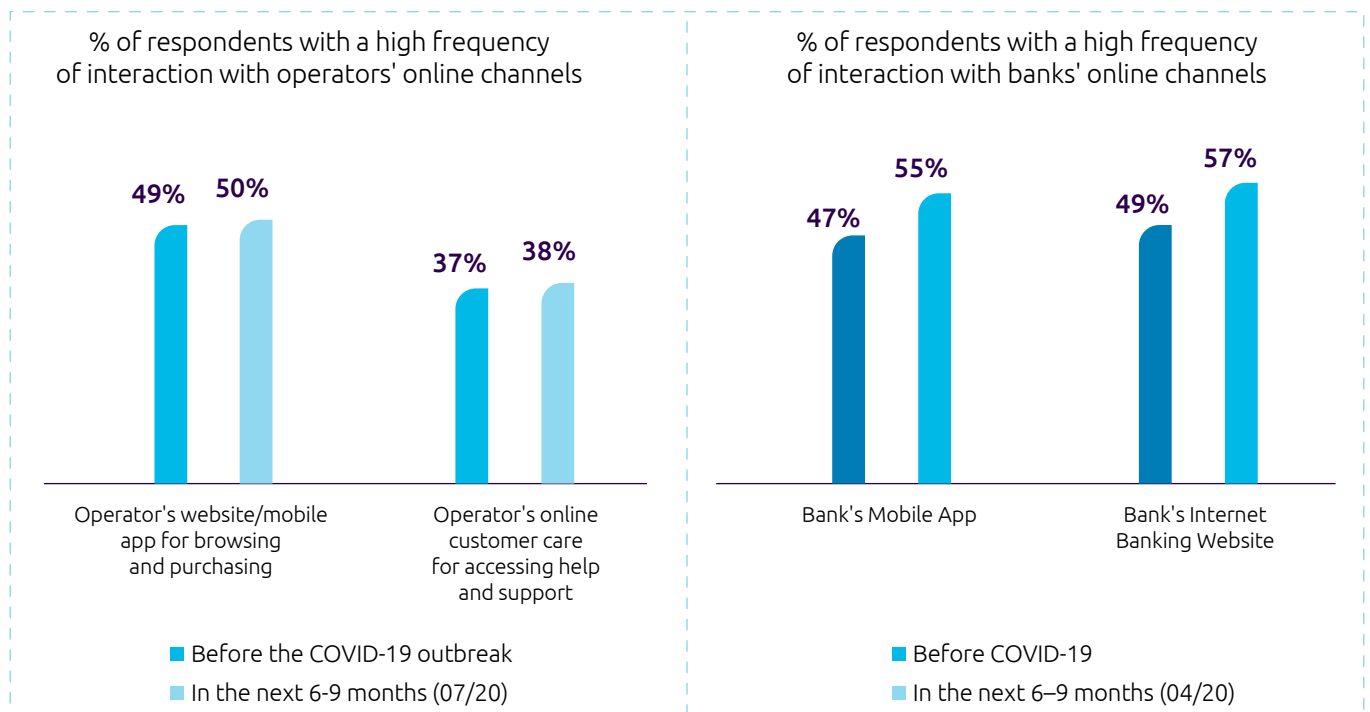
Source: Capterra Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers with access to mobile and broadband connections.

However, the lack of a significant increase overall in online channel adoption in many countries points to the need for telcos to take a closer look at their digital customer experience. If we look at other sectors, we find that they have much higher levels of online channel adoption as a result of the crisis, indicating that consumers may be less engaged with telcos' online channels overall. Our research on the financial services sector, for instance, found an 8-percentage

point increase in the adoption of mobile and internet banking services compared to pre-COVID levels (see Figure 5).⁸

Telcos will need to do more to enhance the digital customer experience in order to spur the adoption of digital channels and boost customer engagement. The shift to online channels will also be critical to optimize costs – a key imperative for telcos at a time when their revenues are under pressure.⁹

Figure 5: Consumer adoption of online channels in the telco sector and comparison with the banking sector



Source: Capgemini Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers.

Source: Capgemini Research Institute, Consumer Behavior Survey, April 2020, N=11,281 consumers.

49% OF CONSUMERS USED OPERATORS' ONLINE CHANNELS FREQUENTLY PRE-COVID TO BROWSE OR PURCHASE DEVICES AND PLANS, AND 37% USED THEM FREQUENTLY TO ACCESS HELP AND SUPPORT.

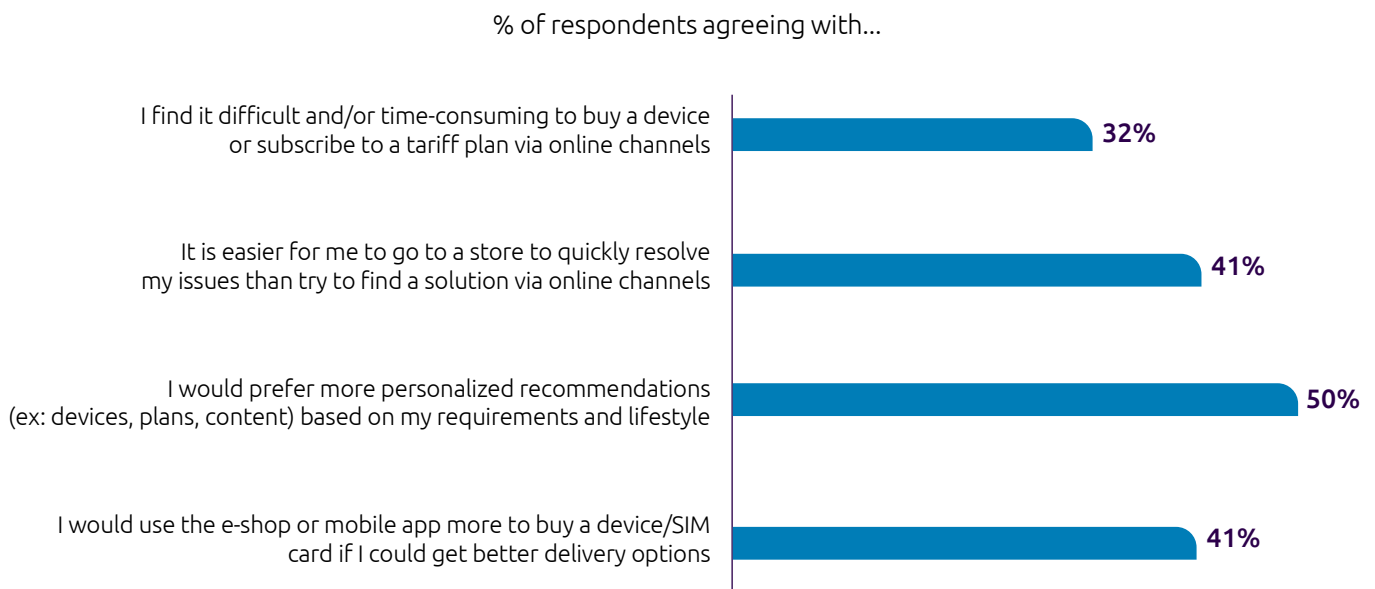
Consumers are open to exploring new online services but find operators' digital channels challenging to use

Due to the risks posed by the pandemic, consumers are willing to try new online services in order to avoid visits to operators' stores. We found that 46% of consumers are open to activating mobile services using eSIMs, rather than visiting a store to activate a physical SIM card. Consumers also prefer online alternatives that help them avoid on-site visits by service technicians for installation or repairs. For instance, 44% of consumers in our survey prefer online, guided device setup and installation services. Consumers in the UK, US

and Spain show a higher inclination towards these sorts of services compared to other countries.

However, there is significant room for improvement in the overall digital customer experience offered by telcos. Our research shows that 32% of consumers find it difficult or time-consuming to buy a device or subscribe to a tariff plan via their operator's mobile app or online store. Further, 41% find it easier to go to a store to quickly resolve issues rather than try to find a solution through operators' online customer care channels. Consumers are also looking for more personalized recommendations and better delivery options (see Figure 6).

Figure 6: Inadequacies in the customer experience are holding back online channel adoption



Source: Capgemini Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers.

32% OF CONSUMERS FIND IT DIFFICULT OR TIME-CONSUMING TO BUY A DEVICE OR SUBSCRIBE TO A TARIFF PLAN VIA THEIR OPERATOR'S MOBILE APP OR ONLINE STORE.

eSIMs: The next generation of mobile connectivity

eSIMs – or embedded SIMs – are programmable SIM cards that are embedded directly into devices. eSIMs allow users to download virtual “profiles” - containing their subscription and network settings - and activate services remotely. eSIMs also allow users to store multiple subscriptions on a single device and to switch easily between networks (as they eliminate the need for physically swapping SIM cards). The use of eSIMs requires eSIM compatible

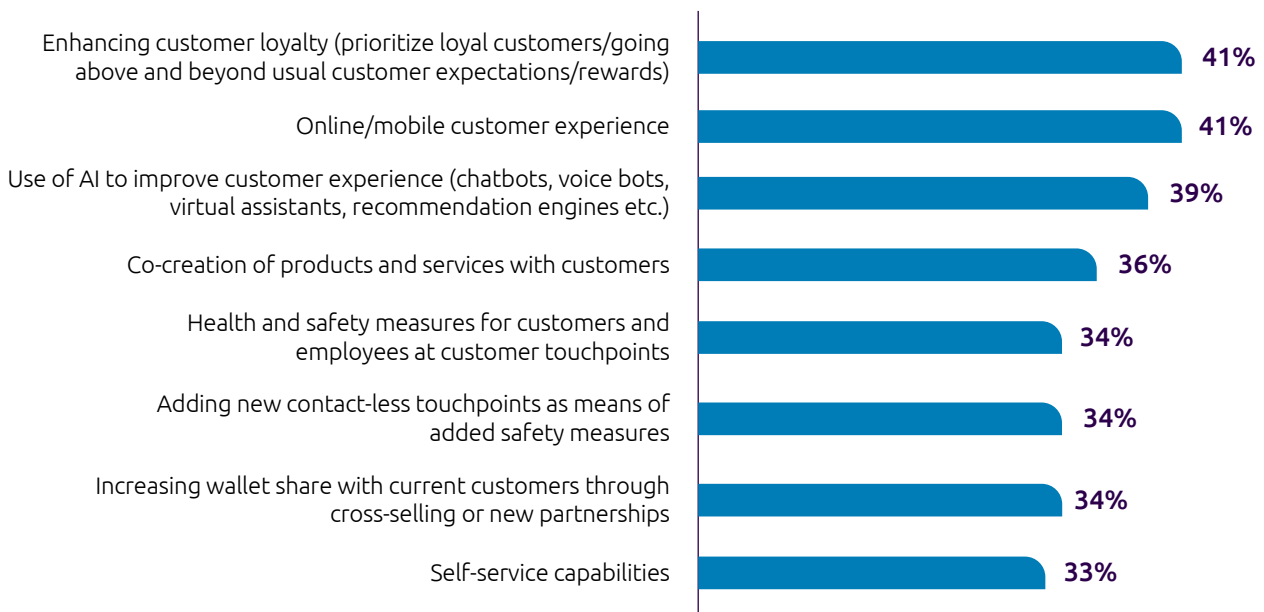
devices that are now offered by leading smartphone manufacturers including Apple, Google and Samsung. Because they are smaller than physical SIM cards, eSIMs take up less space within a device. This in turn allows them to be embedded in smaller devices, such as wearables. Their size also makes them more environmentally friendly as they require less plastic than physical SIMs.^{10,11,12}

For their part, telcos recognize the need to improve the online customer experience. In our survey of the post-COVID new normal, 41% of telecom, media, and high-tech organizations reported that improving the online/mobile

customer experience was a key post-COVID-19 priority (see Figure 7). In order to effectively enhance the customer experience, telcos will need to provide consumers with more intuitive, interactive, and humanized digital journeys.

Figure 7: Enhancing the online customer experience is a key priority for organizations in the telecom, media, and high-tech sectors

Priorities post the COVID-19 outbreak – Customer Experience



Source: Capgemini Research Institute, Transformation Agenda Post COVID-19, May 2020, N=61 respondents for telecom, media, and high-tech sectors.

Action points for organizations

Enhance the digital buying experience

- Provide a frictionless customer acquisition process.** Customer acquisition was a key challenge for telcos during the crisis. In our research on the post-COVID new normal, 39% of telecom, media and high-tech organizations reported that their existing sales channels could not operate during the crisis.¹³ In the current environment, it is critical that telcos switch to onboarding customers digitally. To start with, operators should aim to simplify and digitize the mobile registration and activation process. Malaysian telecom operator Celcom, for instance, enables its prepaid mobile customers to register and activate prepaid SIM cards through the Celcom mobile app by scanning an ID and clicking and submitting a selfie. The app authenticates customers using facial recognition technology.¹⁴ Going forward, operators should also aim to digitize more complex customer acquisition use-cases such as migration to fiber broadband or fixed-mobile convergence (FMC) offers.
- Leverage eSIMs for a more seamless onboarding experience.** The use of eSIMs, or virtual SIM cards, can help simplify the onboarding process significantly. eSIMs allow consumers to switch operators remotely, without having to visit a store to buy a physical SIM card or wait for a SIM card to be delivered home. Orange Flex, Orange Poland's full-digital service offering, enables customers with eSIM-enabled devices to activate SIMs in just two minutes.¹⁵ eSIMs also provide customers with a variety of other benefits, including the flexibility to easily add additional devices such as wearables and tablets to their mobile plans. In order to encourage eSIM adoption, operators should ensure eSIMs are supported for a range of devices.
- Ramp-up delivery options.** To encourage consumers to buy online, telcos should also offer better delivery options, such as same day and express delivery. These could potentially be fulfilled through partnerships with app-based delivery platforms and delivery charges potentially waived.

Expand virtual customer support capabilities

- Introduce virtual assistance solutions.** To address mobile and broadband consumers' health and safety concerns, telcos should consider replacing on-site visits by technicians with online alternatives in instances where it is feasible. For instance, US operator Cox Communications has launched a virtual customer support tool for its broadband customers. The tool – "On-site with Virtual Assist" – allows technicians to connect with broadband customers via video chat. The technicians can then use augmented reality (AR) to guide customers through device set-ups or resolve issues. Len Barlik, executive vice president and chief operating officer at Cox Communications, says, *"On-site Virtual with Assist has been a priority of ours for quite some time, but the rapid escalation of COVID-19 accelerated our push to make this available to our customers now. Knowing we're focused on helping keep our customers and employees safe, our team readied this offering in just 10 days."*¹⁶ AT&T, on the other hand, provides a contactless, over-the-phone device setup and activation service for its mobile customers.¹⁷

Leverage AI to provide a consistent, personalized digital customer experience

Our recent research on AI found that customers have grown increasingly comfortable with AI-enabled interactions. AI-enabled customer interactions have more than doubled since 2018 and as many as 67% of customers trust the recommendations provided by AI systems. Telcos should leverage AI to provide customers with "context-aware" digital interactions:

- Context-aware interactions are personalized, consistent and offer quicker resolution of issues. Our previous research has shown that customers find them more convenient and trustworthy.¹⁸
- This approach can be especially helpful in the current situation, where customers are finding themselves increasingly reliant on digital platforms. Telefonica, for instance, has partnered with Microsoft to launch an AI-based digital customer care platform called "Aura". Christian Gebara, CEO of Vivo, Telefonica's Brazilian operation, says, *"Aura is making our customer experience more humanized, more personalized in real-time interactions. We are confident that it's going to help us to be even more digital, more profitable, with a better customer experience and satisfaction."*¹⁹

When leveraging AI, operators should also ensure a seamless handoff from the AI to human agents whenever it is needed. Our research shows that a human touch continues to remain important to customers.²⁰

COVID has changed what consumers require from physical stores

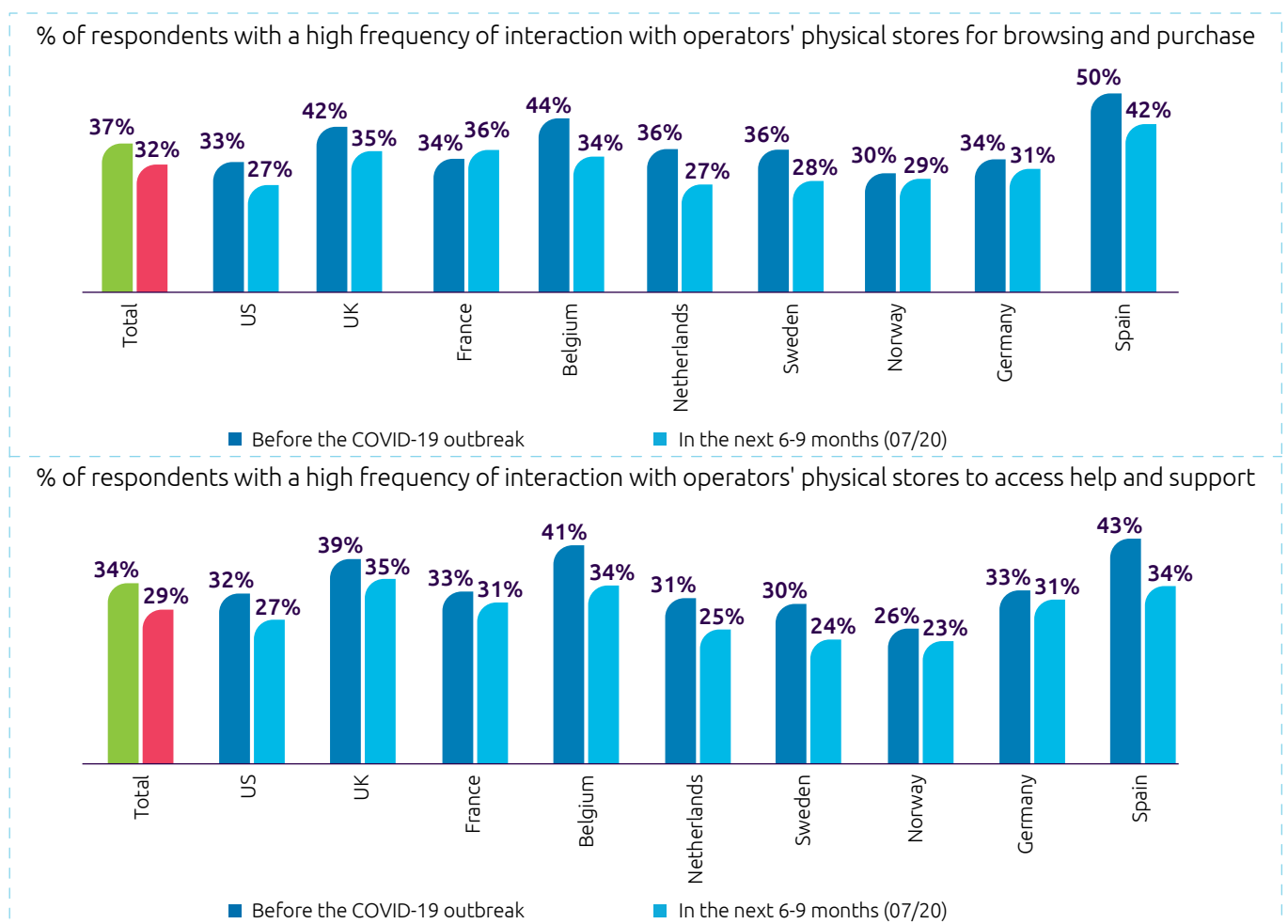
Physical stores are still important but require a new format and approach

The physical store will continue to remain a significant touchpoint for telco consumers. As many as 32% of consumers plan to visit physical stores frequently to browse or make purchases in the next 6–9 months, and 29% expect to do so to access help and support. Highlighting the role of the physical store in the overall channel mix, Arnold Buddenberg, Enterprise Digital Business & IT transformation

architect at Orange Labs Services, says, *“We need to see the shop as one channel within an overall experience. But what is unique in the shop is that I can give the customer a live experience that is different from a digital experience in all the other channels.”*²¹ Customers clearly value the live experience that physical stores offer. More than half (53%) of respondents in our survey prefer to see or touch a device in a shop before making a purchase, rather than buying it online.

However, physical store footfalls are not expected to return to pre-COVID levels in most countries in our survey (see Figure 8). Overall, the proportion of customers who expect to visit stores frequently to browse and purchase is likely to fall from 37% pre-COVID to 32% in the next 6–9 months, while those who expect to visit stores to access help and support is expected to fall from 34% to 29%.

Figure 8: Impact of COVID-19 on physical store footfalls



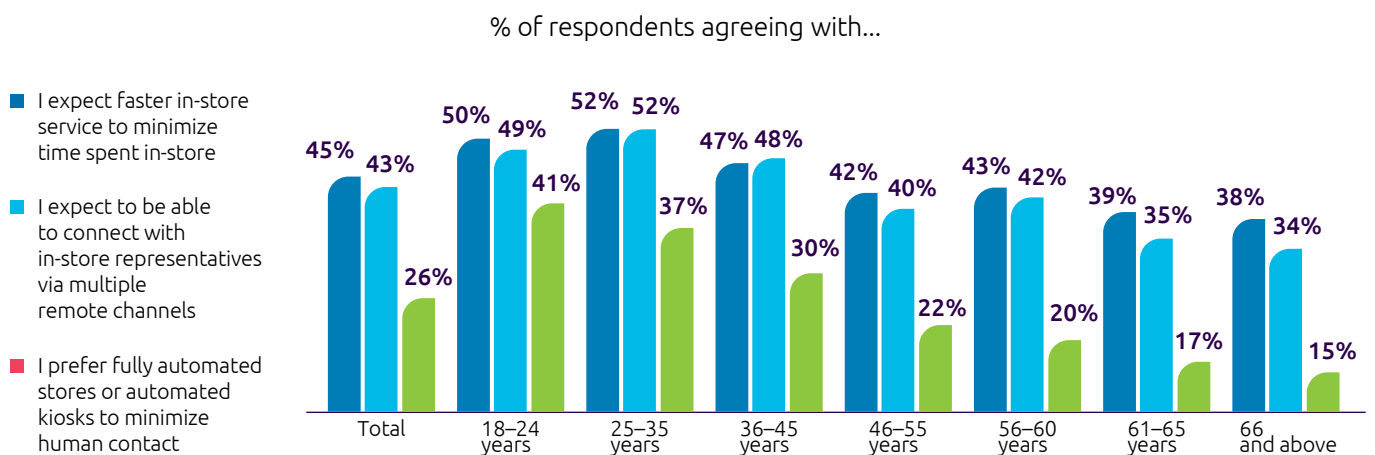
Source: Capgemini Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers.

Consumers expect faster service and increased automation in-store - driven by health and safety concerns

The COVID-19 crisis has redefined consumers' expectations from operators' stores. We found that 45% of consumers

expect faster service in-store, such as faster lanes for simple purchases or pickups. Further, consumers – especially those in younger age groups – also show a preference for fully automated stores and automated kiosks to minimize exposure and human contact when in-store. For instance, 41% of consumers aged 18–24 want increased levels of automation compared to just 17% of those aged 61–65 (see Figure 9).

Figure 9: Consumers' in-store preferences in the next six to nine months

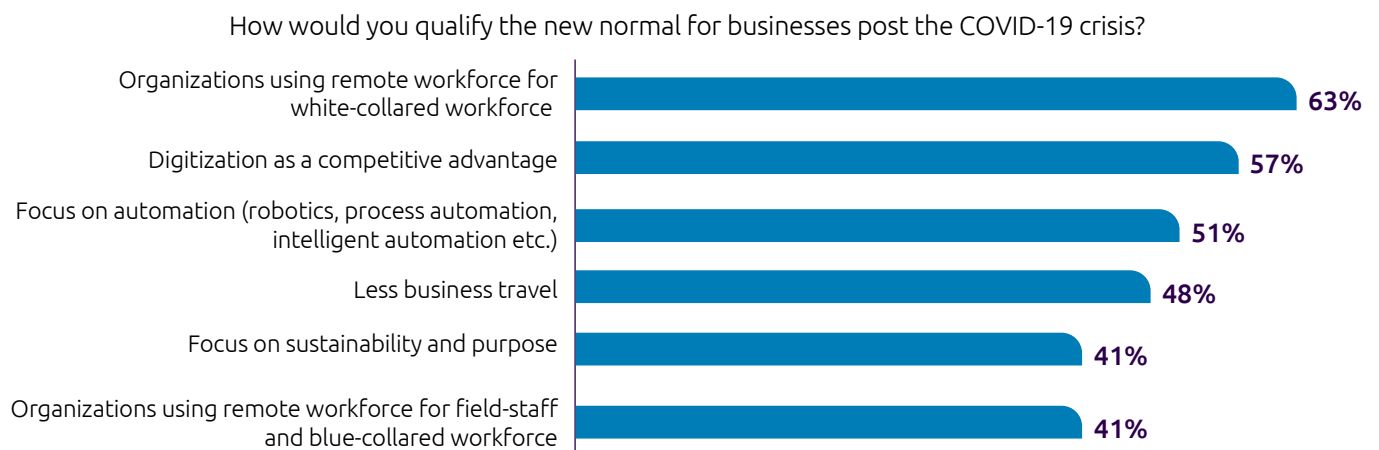


Source: Capgemini Research Institute, Telco Consumer Behavior Survey, July 2020, N=6,382 consumers.

Telcos recognize the need for greater digitization and automation. Our previous research on organizations' post-COVID transformation agenda found that more than half

(57%) of telco and media organizations view digitization as a competitive advantage, and 51% see a focus on automation as a key aspect of the post-COVID new normal (see Figure 10).

Figure 10: Telcos view digitization and automation as key elements of the post-COVID new normal



Source: Capgemini Research Institute, Transformation Agenda Post COVID-19, May 2020, N=752 respondents globally, N=61 respondents for telecom, media, and high-tech sectors.

Action points for organizations

Adapt the store setting for increased safety

- Optimize store traffic for a safer shopping experience.** Online appointment booking and virtual queueing systems help prevent in-store overcrowding, supporting safe distancing. They also allow customers to minimize time spent in the store. Orange France, for instance, rolled out an appointment booking system for customers visiting stores post lockdowns. The system allows customers to reserve a slot at a store close to them through the Orange website or mobile app.²² In the UK, EE has launched a virtual queueing system that enables customers to book in-store appointments via an app. Customers receive a text message when an advisor is ready to see them.²³ Telcos should also consider segmenting queues, such as faster lanes for pick-ups of online orders and reserved slots for at-risk consumers (e.g., the elderly).

Ramp-up in-store automation

- Offer contactless payment and mobile-based self-checkout options.** Our previous research found that, during the COVID crisis, 66% of consumers prefer using mobile apps at physical locations – such as stores and bank branches – rather than touch-based alternatives. Operators should respond by providing access to contactless payment options so that customers do not need to handle cash or key in PIN codes into POS terminals. In the UK, for instance, telecom operator O2 accepts contactless payments, including those made via the Apple Pay and Google Pay mobile wallets.²⁴ Telcos should also offer mobile-based self-checkout options that retailers such as Walmart have rolled out in order to deliver a safer checkout experience.²⁵

- Automate online order pickup.** Telcos could consider automating the click-and-collect process using vending machines or smart lockers. This is so that customers do not need to wait in line or interact with store staff to pick up online purchases. Retailers such as JD.com in China, for instance, installed smart lockers outside residential areas for the delivery of packages.²⁶ Such solutions can also be installed at operators' retail stores to offer customers a contactless self-collection option when picking up online purchases.
- Explore new store formats such as unmanned stores.** With increased in-store automation, operators can enable customers to enjoy the in-store experience while reducing the risk involved in human contact. Singapore-based operator Singtel's pop-up store format – "Unboxed" – leverages technology to entirely eliminate the need for face-to-face interaction. The unmanned, fully automated 24-hour store features a roving live bot with built-in facial recognition technology that answers customer queries and provides recommendations. The store allows customers to browse and purchase devices and accessories and sign up for plans, using video-enabled self-service kiosks and an automated self-checkout process.²⁷

Connect customers with in-store advisors

- Enable one-on-one customer support with store representatives.** Operators should offer customers the option to connect with in-store representatives remotely. This will be especially helpful to consumers who are reluctant or cannot easily reach a store. UK-based operator Three, for instance, allows customers to connect with store advisors in a live environment for help with choosing a device or for other forms of support. Customers have the option to chat online with store advisors and can also receive livestreamed one-on-one advice related to their purchases.²⁸ Norwegian operator Telenor also allows its customers to connect with in-store representatives remotely for advice on selecting mobile devices, broadband plans, or TV packages.²⁹

Conclusion

Telecom operators are at the forefront of consumers' social and economic life in the new normal. As consumers' needs and requirements evolve with the crisis, telecom operators have a critical role to play in helping them navigate the crisis smoothly. This will require going beyond tackling customers' immediate connectivity needs and viewing their needs holistically from the point of view of last-mile optimizations, in-home WiFi coverage, as well as access to content, software, security, and support services. Operators will also need to review their physical and digital touchpoints. Physical stores will need to evolve to meet consumers' heightened health

and safety concerns. At the same time, operators will also need to renew their focus on the digital customer experience. This will be critical not only in driving convenience and engagement, but also in helping operators optimize costs. Digitally mature operators that have been spearheading digital customer experience initiatives will find themselves well-placed to respond to changing customer expectations during these times of crisis. Others that are yet to do so should urgently ramp-up their transformation efforts or risk being left behind.

This document is part of the Capgemini Research Institute's special series of research notes on pragmatic tips to help organizations tide over the COVID-19 pandemic. You can find more such research notes and other tips and analyses at <https://www.capgemini.com/our-company/covid-19-insights-for-today-and-tomorrow/>

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How Capgemini can help you

Inventive Telecoms helps operators and industry players in three ways:

- For B2B, this approach rewires and reboots omnichannel customer experience and optimizes business operations while enabling the smooth extension of an offer portfolio to tackle ICT revenue growth opportunities.
- For B2C, Inventive Telecoms provide a framework to launch new digital experiences, services, and universes that help organizations gain new revenue streams. This includes new greenfield and disruptive end-to-end operations where we have seen strong acceleration on the market in the last 18 months.

- For vertical industry players, it supports the revenue capture and efficiency opportunities associated with implementing 5G capabilities to stay at the forefront in the connected world. It helps them set up their own capabilities to implement and manage the telecoms services they require.

Inventive Shopping helps telcos reimagine the role of the store in a post-COVID world and deliver an effective cross-channel experience.

For more information, please contact

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