

Unlocking Customer Satisfaction

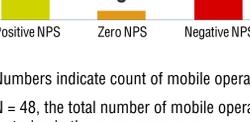


Why Digital Holds the Key for Telcos

Mobile Operators are Out-of-Sync with Consumers

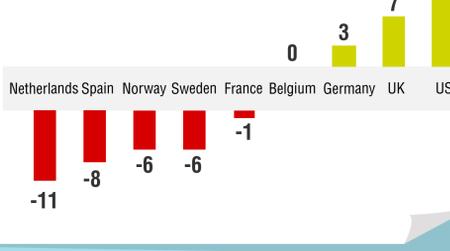
The Net Promoter Score (NPS) of Mobile Operators is Low and Negative

Mobile Network Providers Categories based on their NPS



Numbers indicate count of mobile operators
N = 48, the total number of mobile operators featuring in the consumer survey

Country-wise NPS

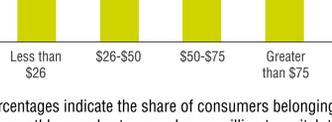


Consumers Want a Different, Digital-Only Mobile Operator

58% of consumers are willing to switch to a **Digital-Only Network Provider**...

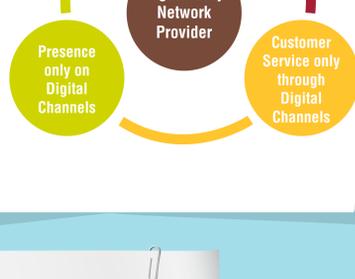
and **high-value customers** are even more keen to switch

High-Spenders are More Willing to Switch to a Digital-Only Mobile Operator



Percentages indicate the share of consumers belonging to the monthly spend category who are willing to switch to a digital-only operator

N = 5776, the total number of consumers surveyed



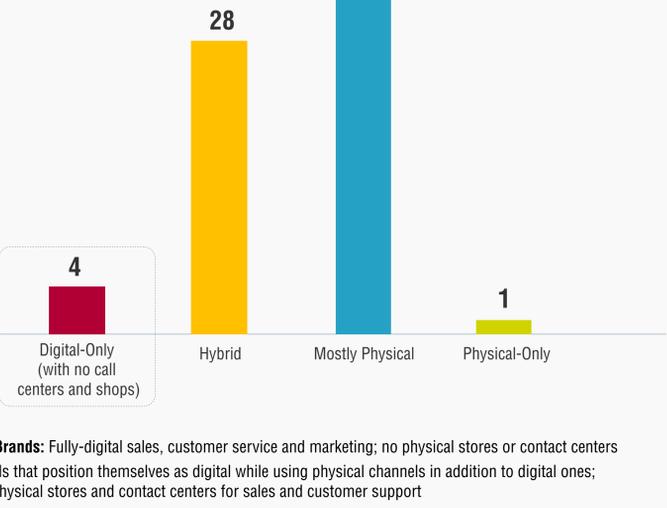
44% of consumers are willing to switch to **Google, Facebook or Apple** should they offer mobile services

Mobile Operators' Digital Initiatives are Half-Hearted

64% of consumers believe that Telcos have **not used digital technologies** to improve their experience

of consumers believe that Telcos have not used digital technologies to improve their experience

Only Four Brands Launched by Key Mobile Operators in the US and Europe are 'Digital-Only' Brands



Digital-only Brands: Fully-digital sales, customer service and marketing; no physical stores or contact centers

Hybrid: Brands that position themselves as digital while using physical channels in addition to digital ones; presence of physical stores and contact centers for sales and customer support

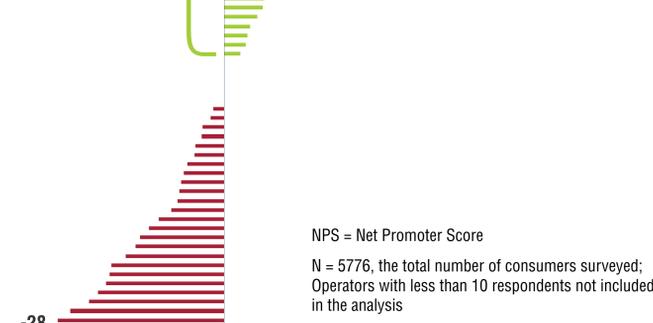
Mostly Physical: Predominant use of physical channels for sales, service and marketing; minimal digital presence

N=66, the number of mobile brands launched by 59 key mobile operators in the US and Europe

Telcos Offering a Digital Customer Experience are Reaping the Benefits

Some Telcos Stand Out

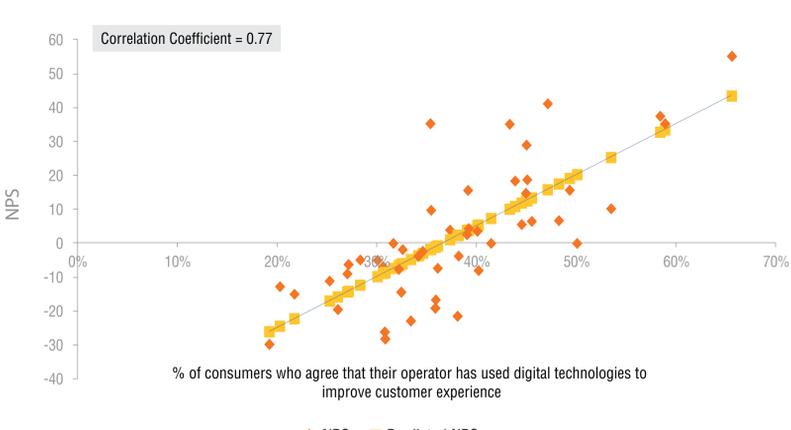
NPS of Operators Featuring in the Consumer Survey



NPS = Net Promoter Score

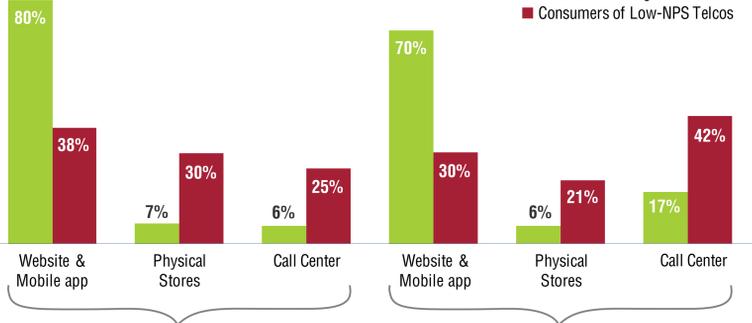
N = 5776, the total number of consumers surveyed; Operators with less than 10 respondents not included in the analysis

These Operators Have Utilized Digital Technologies to Improve Customer Experience



N = 48. Every dot represents NPS of an individual mobile operator, with diamonds indicating the actual NPS and squares indicating predicted NPS based on a correlation analysis

Customers of These Telcos Decidedly Prefer Digital Channels Over Physical Ones



NPS = Net Promoter Score

High-NPS Telcos: Top five mobile operators in the study in terms of having NPS of +35 and more; 104 respondents belong to high-NPS operators

Low-NPS Telcos: Bottom five operators in the study in terms of having NPS of -21 and less; 560 respondents belong to low-NPS operators

Percentages indicate share of consumers belonging to high-NPS and low-NPS Telcos. Percentages may not total to 100 as some respondents selected "others" option.

A "Digital Telco" Model Shows the Way for a Mobile Operator of the Future

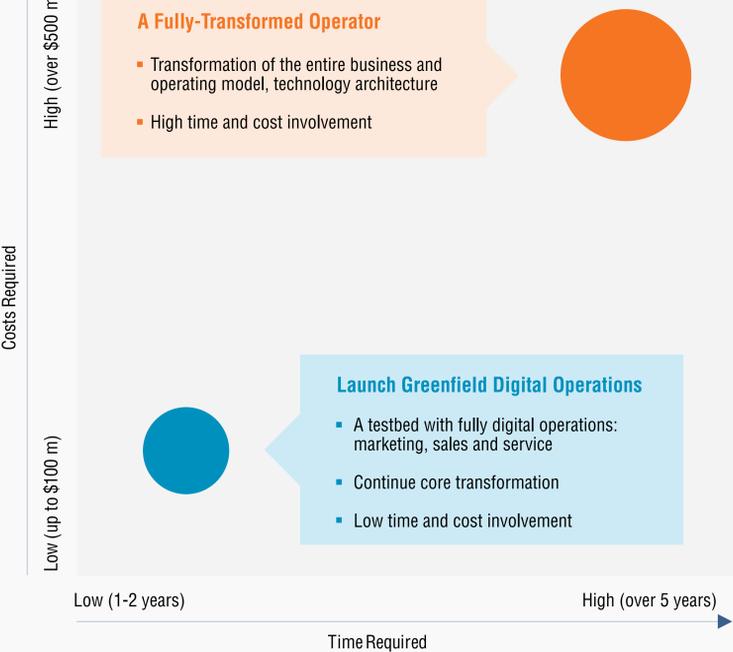
Characteristics of a Digital Telco



How Can a Telecom Operator Become a Digital Telco?

A Roadmap for Mobile Operators to become Digital Telco

Telcos can accelerate the transition by launching Greenfield digital operations in the short term, while continuing with the core transformation in the background



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