Mobile digital experience in Europe and the USA: consumer survey

Stephen Sale and Matt Small

About this report

This report provides an analysis of the digital experience of smartphone users in Europe and the USA. It uses consumer survey data to analyse mobile customers' usage of traditional and digital channels for sales and support interactions. It also provides detailed analysis of the impact of self-care apps on customer satisfaction.

The survey was conducted in association with Dynata between August and September 2021. The survey groups were chosen to be representative of the internet-using population in Europe and the USA. We set quotas on age, gender and geographical spread to that effect. There were a minimum of 1000 respondents per country (2000 in the USA).

GEOGRAPHICAL COVERAGE

Western Europe (WE)

- France
- Germany
- Ireland
- Italy
- Spain
- Sweden
- UK

Central and Eastern Europe (CEE)

- Poland
- Turkey

North America (NA)

- USA

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the main channels used by different customers to interact with mobile operators? What is the split between traditional and digital channels?
- What are the different combinations of sales and service channels used by consumers and how do these vary by operator and country?
- Which operators have the highest penetration of digital channels such as self-care apps?
- How does the channel mix relate to key customer satisfaction metrics such as Net Promoter Scores (NPSs)?

WHO SHOULD READ THIS REPORT

- Strategy executives and managers who are interested in improving the customer experience within telecoms operators, understanding the drivers of change and the impact of digital experience initiatives on customer satisfaction.
- Market intelligence and research executives in service providers that are responsible for understanding end-user trends and supporting business units in identifying and addressing new opportunities.
- Equipment/device manufacturers and software providers that want to identify end-user trends in service and support, and help their operator customers to improve their ability to address opportunities.

Executive summary

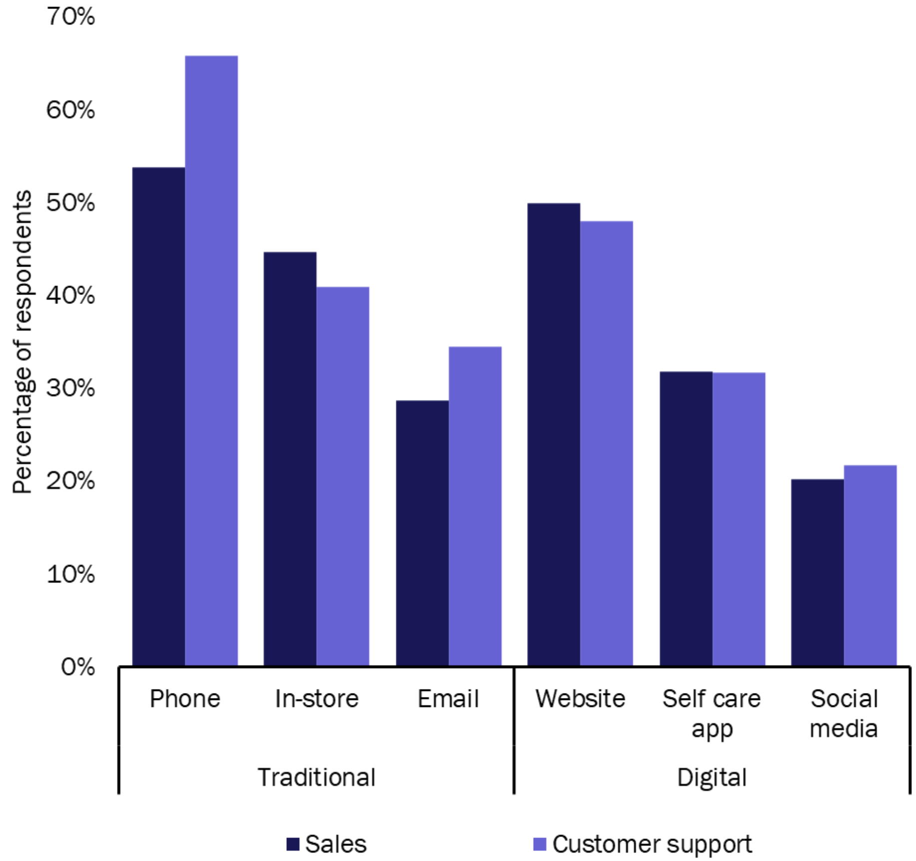
The increase in digital channel penetration was limited, but consumers who already used such channels relied on them more-heavily in 2021 than they did in 2020.

Digital channel use remained at 2020 levels (+/- one or two percentage points (pp) only) in 2021, suggesting that the behavioural changes experienced during the pandemic have normalised. Websites continue to be the second-most-used sales (50% of respondents) and customer support channels (48%), behind the phone/contact centre. Significant variations remain between countries. For example, consumers in Spain show a strong preference for the phone as a channel for interacting with their mobile operator.

Penetration of self-care apps varies by both country and by operator. Some operators have penetration levels that exceed 40%, although in general operators in Europe and the USA lag behind operators in Asia in terms of app adoption and engagement.

Penetration of digital channels has flattened, but results show increased engagement with channels, notably for self-care apps, which are establishing themselves as major touchpoints for customers. Indeed, we found a strong relationship between satisfaction with self-care apps and NPS. Survey data can be used to track progress of digital experience initiatives with a few operators leading the way with best practice.

Figure 1: Communication with a mobile service provider for sales and customer support, by channel, Europe and the USA, 2021[1]



Source: Analysys Mason

[1] Please refer to the methodology and panel information section for the sample size and relevant survey questions.

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About the authors

Stephen Sale (Research Director) directs Analysys Mason's consumer research, which covers consumer mobile, fixed, convergence, digital services and video/entertainment markets. His specialist areas are mobile operator strategies, customer experience and telecoms growth opportunities. He has extensive experience in advising senior executives on strategic issues and speaking at – and chairing – conferences. Before joining Analysys Mason in 2004, Stephen worked in the industry on areas that include VoIP, next-generation service architecture and broadband access. He has a degree in economics and an interdisciplinary MRes from the University of London.

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We are experts in the telecoms, media and technology sector

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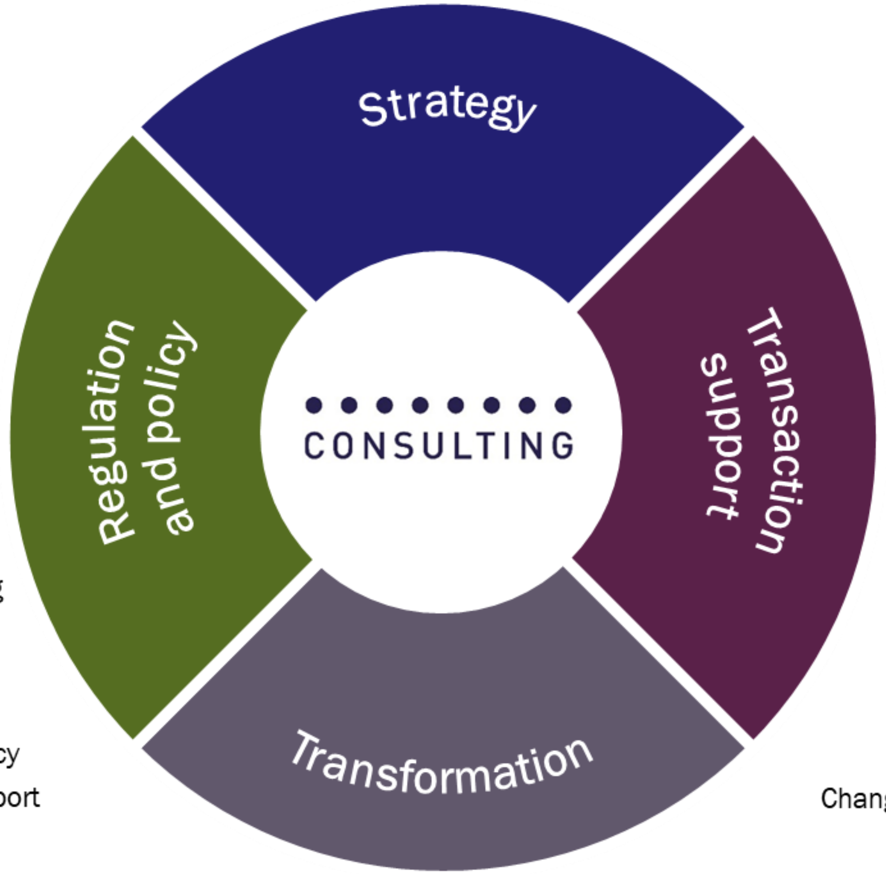

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