Fixed–mobile convergence: consumer survey 2023

Stefano Porto Bonacci

About this report

This report is based on Analysys Mason's annual consumer survey, which tracks consumers' habits and preferences for telecoms services. It focuses on the penetration of fixed–mobile convergence (FMC), the characteristics of consumers that take FMC plans and how the adoption of FMC plans correlates with intention to churn and customer satisfaction.

The survey was conducted in association with Dynata between July and August 2023. The survey groups were chosen to be representative of the internet-using population in selected countries around the world. We set quotas on age, gender and income. There were at least 1000 respondents per country.

GEOGRAPHICAL COVERAGE

- **Western Europe (WE):** France, Germany, Ireland, Italy, Norway, Spain, Sweden and the UK
- **Central and Eastern Europe (CEE):** Poland and Turkey
- **North America (NA):** Canada and the USA
- **Developed Asia–Pacific (DVAP):** Australia and New Zealand
- **Emerging Asia–Pacific (EMAP):** Malaysia
- **Africa:** South Africa

KEY QUESTIONS ANSWERED IN THIS REPORT

- How should market structure influence operators' strategies for offering FMC retail bundles?
- What are the most significant drivers of customer satisfaction for FMC subscribers, as measured by Net Promoter Score (NPS)? Which operators have the highest NPSs and why?
- What are the most significant drivers of fixed broadband and mobile churn among FMC customers and which strategies can operators adopt to improve customer retention?
- How does the use of customer service channels and the take-up of value-added services (VAS) vary among FMC and non-FMC subscribers?

WHO SHOULD READ THIS REPORT

- Product managers and strategy teams working for converged operators that are launching new FMC offers aimed at the retail market, or operators that are designing a response to their competitors' offers.
- Marketing executives and product managers for operators that are making decisions about service design and its impact on the customer retention of FMC offers.
- Industry observers and regulators that want to understand how FMC is affecting the customer experience.

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About the author

Stefano Porto Bonacci (Senior Analyst) is a member of the *Consumer Services* research practice and the lead analyst of the *Fixed–Mobile Convergence* research programme. His specialisations include market analysis, market forecasting and market sizing. He has over 5 years of experience in developing and delivering data and reports on the TMT space. He holds an MSc in economics from Bocconi University (Italy) and has experience as an economic analyst in the telecoms and financial sectors.

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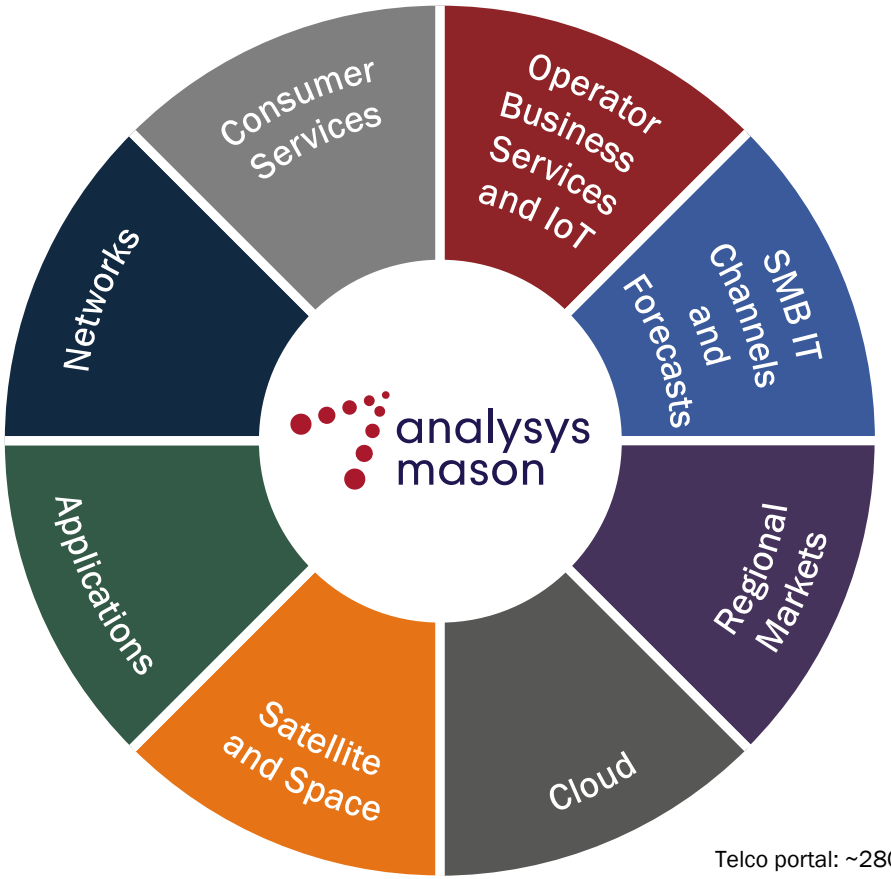

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PUBLISHED BY ANALYSYS MASON LIMITED IN **OCTOBER 2023**

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