



Mobile digital experience: consumer survey



Eulalia Marín

About this report

This report uses the results of our consumer survey to provide an analysis of the mobile digital experience for consumers in South Africa and several countries in Asia-Pacific, the Middle East, Europe and North America.

The survey was conducted in association with Dynata and On-Device Research (ODR) between July and August 2023. The survey groups were chosen to be representative of the internet-using population in the above-mentioned regions. We set quotas on age, gender and geographical spread to that effect. There were at least 750 respondents per country.



GEOGRAPHICAL COVERAGE

Western Europe (WE):

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

North America (NA):

- Canada, USA

Central and Eastern Europe (CEE):

- Poland, Turkey

Sub-Saharan Africa (SSA):

- South Africa

Emerging Asia-Pacific (EMAP):

- Malaysia

Developed Asia-Pacific (DVAP):

- Australia, New Zealand

Middle East and North Africa (MENA):

- Kuwait, Oman, Saudi Arabia, UAE



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 support channels (phone, in-store and email) and digital channels (website, self-care apps and social media)?
- 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?
- What is the relationship between the use of traditional/digital channels and 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 want to help their operator customers to improve their ability to address opportunities.



Contents



Executive summary





Analysis

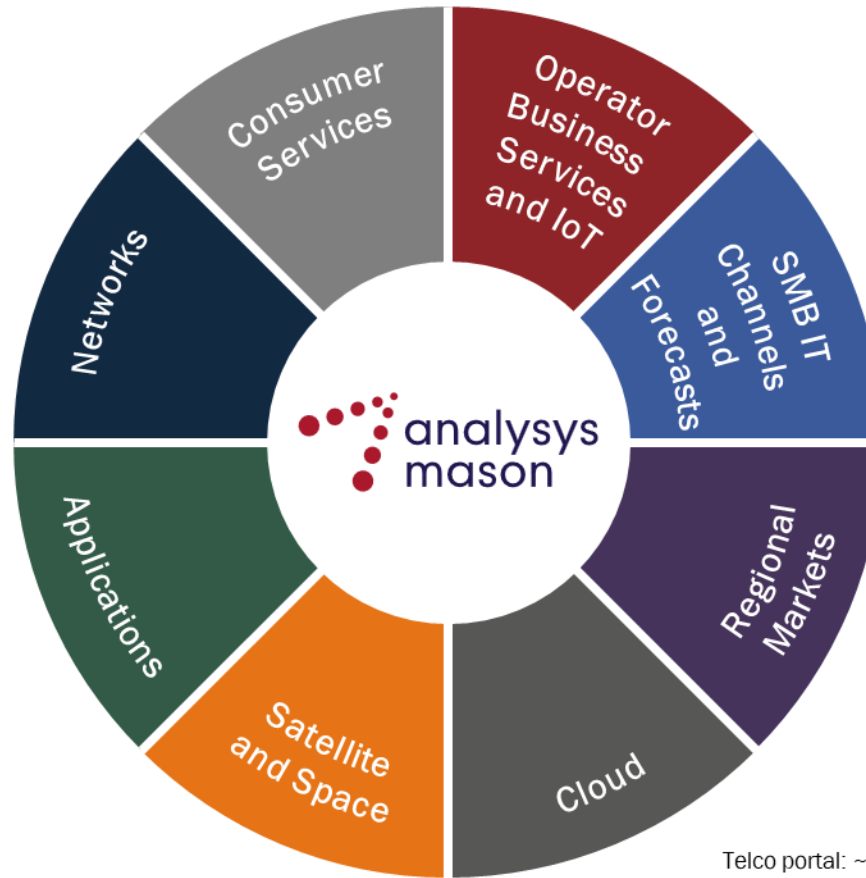
Annex

Methodology and panel information

About the author and Analysys Mason

Our research services

- 
Consumer Services
 - Fixed Broadband Services
 - Mobile Services
 - Fixed-Mobile Convergence
 - Smart Devices
 - Future Comms
 - Video, Gaming and Entertainment
- 
Networks
 - Next-Generation Wireless Networks
 - Wireless Infrastructure Strategies
 - Fibre Infrastructure Strategies
 - Operator Investment Strategies
 - Telecoms Strategy and Forecast
 - Transport Network Strategies
- 
Applications
 - Network Automation and Orchestration
 - Customer Engagement
 - Monetisation Platforms
 - Digital Experience
 - Automated Assurance
 - Service Design and Orchestration
 - Telecoms Software Market Shares
- 
Satellite and Space
 - Satellite Strategies for Telcos
 - Satellite Capacity
 - Satellite Infrastructure
 - Satellite Mobility



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks
- Cyber Security



SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- Forecast data for 80 countries
- Telco portal: ~2800 forecast and ~320 historical metrics
- SMB Technology Forecaster portal: ~120 000 forecast metrics



analysismason.com/what-we-do/practices/research

PUBLISHED BY ANALYSYS MASON LIMITED IN **FEBRUARY 2024**

Analysys Mason Limited. Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.

We have used reasonable care and skill to prepare this publication and are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided “as is”, with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

We reserve the rights to all intellectual property in this publication. This publication, or any part of it, may not be reproduced, redistributed or republished without our prior written consent, nor may any reference be made to Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2024.