



# Mobile devices and distribution channels: consumer survey



Tom Rebbeck

## About this report

This report uses consumer survey data to analyse the trends in distribution channels among smartphone users in a range of high- and middle-income countries.

This survey was conducted in association with Dynata between July and August 2022. The survey groups were chosen to be representative of the mobile-internet-using populations of each country. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents in each country.

### KEY QUESTIONS ANSWERED IN THIS REPORT

- How well do operators perform as smartphone sales channels?
- How has the pandemic affected device distribution channels?
- What are the prospects for telecoms operators as distributors of smartphones?

### GEOGRAPHICAL COVERAGE

#### High-income countries

- Australia
- Canada
- France
- Germany
- Ireland
- Italy
- New Zealand
- Norway
- Poland
- Spain
- Sweden
- UK
- USA

#### Middle-income countries

- Malaysia
- Philippines
- South Africa
- Turkey

### WHO SHOULD READ THIS REPORT

- Operator strategy and product teams that are interested in trends in smartphone distribution.
- Handset vendors that are interested in the role of telecoms operators as device distributors.
- Other parties that are interested in the trends in smartphone retail.

# Executive summary

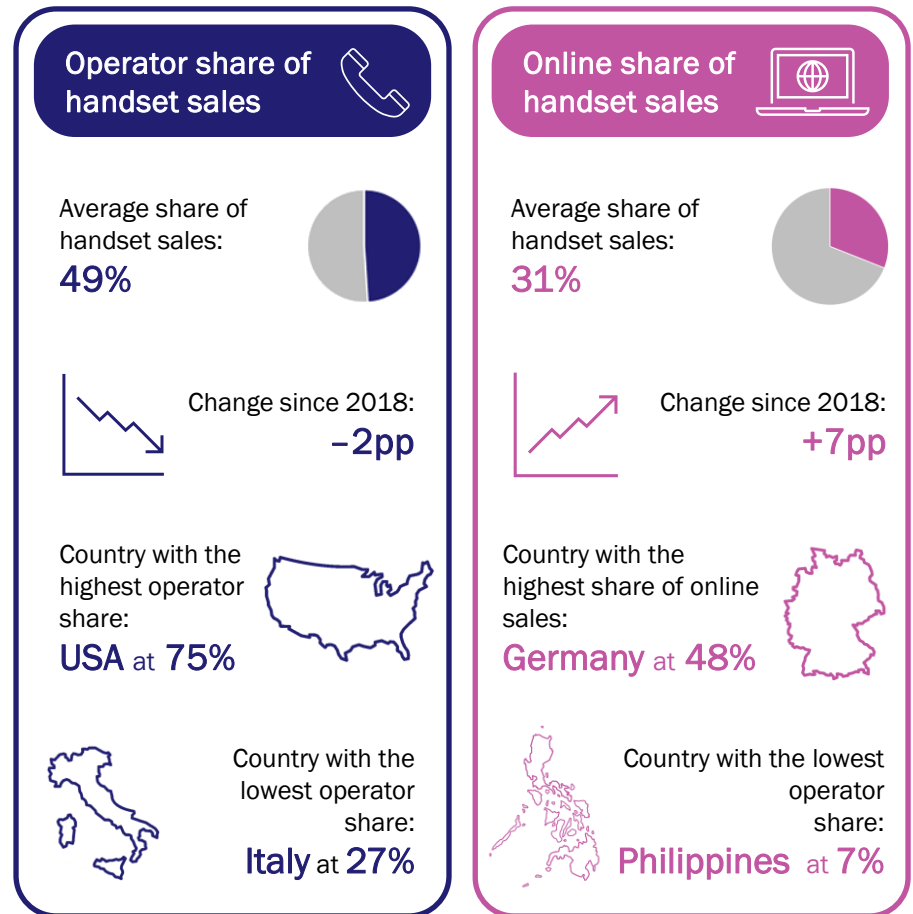
Changes to the handset market over the COVID-19 pandemic period have stabilised, with operators retaining around half of all handset sales on average, though with significant differences by country.

For most operators, the pandemic had little impact on their share – the market for handset sales is mature and only changes slowly.

The pandemic did push a greater number of purchases to online channels but that too has since stabilised, at around 30%.

However, there is a risk that, as the share of online sales gradually increases, operators could lose out. Operators have around 41% of the online handset market, compared to 58% of sales in physical stores. Operators will need to manage any transition to online sales extremely carefully.

Figure 1: Key data on handset sales by channel



Source: Analysys Mason



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## About the author



**Tom Rebbeck** (Partner) leads Analysys Mason's *Operator Business Services and IoT* research practice drawing on more than 20 years of experience in the telecoms sector. He is based in our London office, but works for clients worldwide. Tom is a specialist on the Internet of Things (IoT) and other enterprise services and has written widely on the role for operators as telecoms markets develop. As well as published research, he has worked on projects for a range of clients – including operators, regulators, industry bodies and vendors. Many of these projects have been supported by original research, such as expert interviews and customer surveys.

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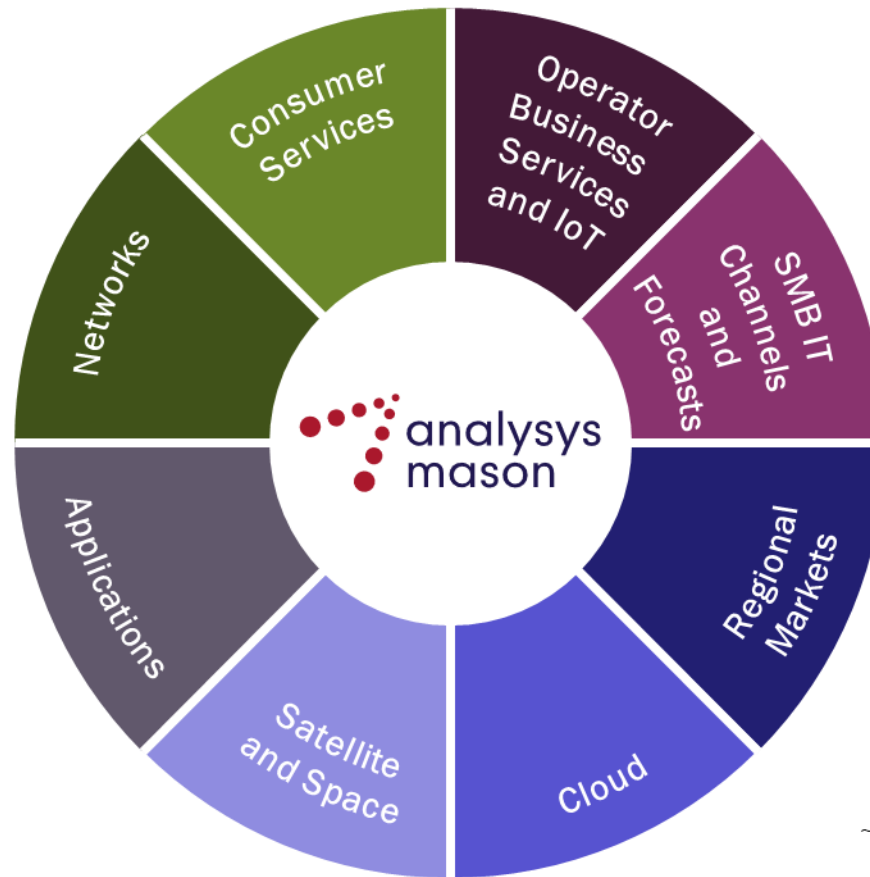
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  - Operator historical data

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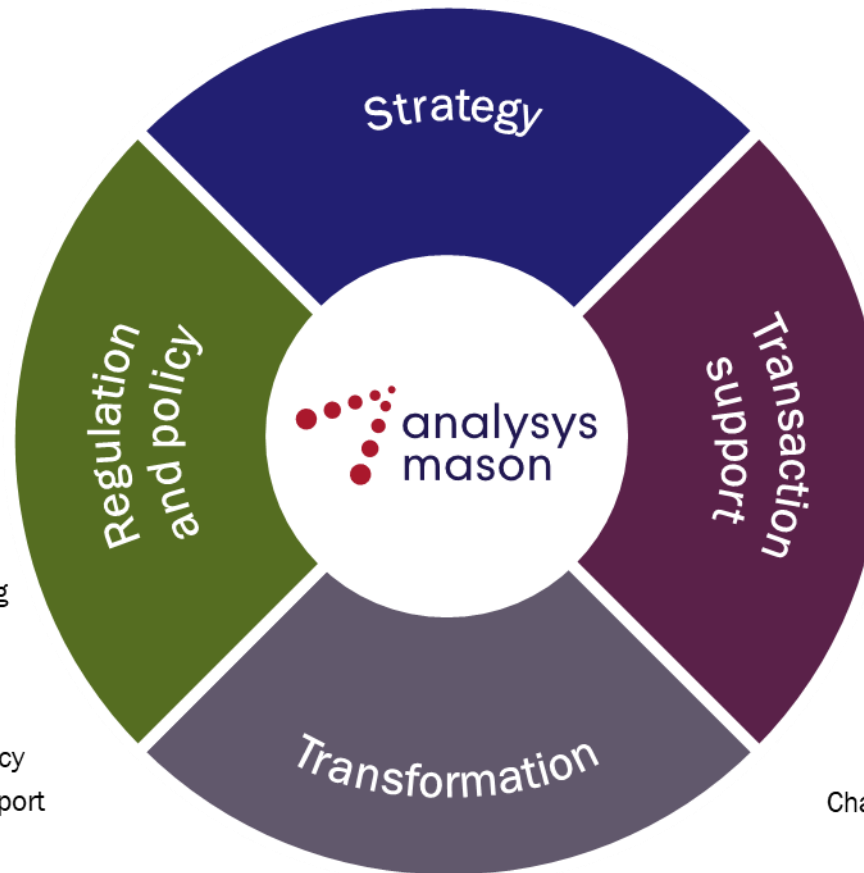
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- Infrastructure strategy



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