

CONSUMER INSIGHTS

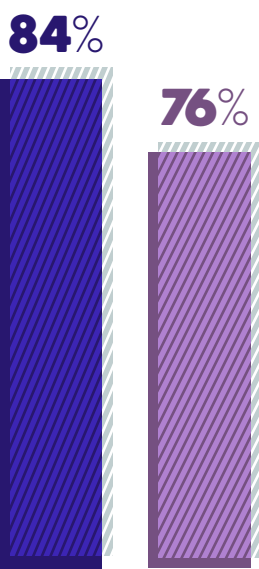
TELECOM IN 2021

Consumers are overall happy with their phone and carriers, but they will consider change. Carriers may be “open season” as the service is perceived more as a commodity and less of a personal attachment.

No surprise that age matters here: Younger consumers are more loyal and more connected to their phones and the “need-to-know” info it provides.

SWITCHING

Consumers are satisfied with their **phone** and **carrier**.

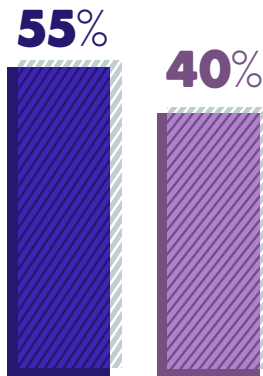


3 IN 5 say they can be convinced to **change their phone**.

4 IN 5 say they can be convinced to **change carriers**.

“MY CARRIER TREATS ME RIGHT. ANY PROBLEM I HAVE HAD, HAS BEEN RESOLVED QUICKLY. PRICES ARE IN LINE WITH OTHERS.”

However, people are more likely to be **very satisfied** with their **phone** than their **carrier**.



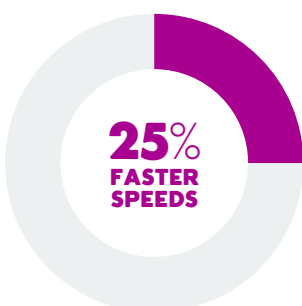
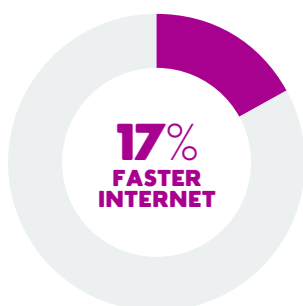
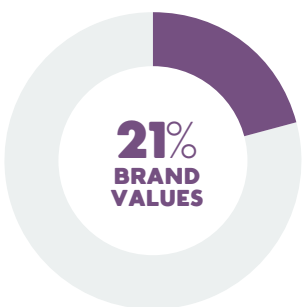
“AFTER TRYING AND OWNING SEVERAL BRANDS AND MODELS OVER THE YEARS, THE FUNCTION AND LACK OF WHAT I CONSIDER UNNECESSARY DISTRACTIONS OF MY CURRENT PHONE, AND OVERALL FIT FOR MY NEEDS WITHOUT EXCESSIVE ‘FLUFF’, I ALWAYS GO BACK TO MY ORIGINAL BRAND BECAUSE IT JUST FITS.”

SWITCH MOTIVATORS

Lower prices are the #1 reason given to consider a switch—49% for phone and 61% for carrier. But these other sentiments play a role, too.

Consumers would change **phones** based on

Consumers would change **carriers** based on



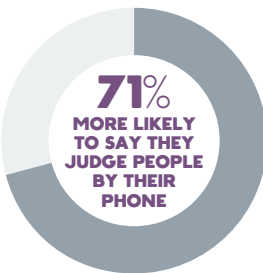
IT'S PERSONAL, PART I

Prestige perception is a marketplace reality and correlates to consumer satisfaction.

Phones Ranked By Prestige:

1. APPLE
2. SAMSUNG
3. GOOGLE

% Of Owners Very Satisfied:



“I’VE HAD AN IPHONE SINCE THE DAY IT WAS RELEASED BACK IN 2007. I WILL NEVER CHANGE.”

“I ENJOY THE HARDWARE IN THE GOOGLE PIXEL LINE. I’VE HAD GOOGLE PHONES SINCE THE NEXUS SERIES. I LIKE THAT THEY ARE GEARED TOWARDS THE TECH SAVVY CROWD.”

“SAMSUNG HAS CONSISTENTLY PROVIDED TOP-QUALITY PRODUCTS FOR OVER A DECADE. UNLESS THAT QUALITY WERE TO SUDDENLY DROP, I CANNOT IMAGINE SWITCHING BRANDS.”

IT'S PERSONAL, PART II

A bona-fide lifestyle “tool,” for better or worse.

54% SAY THEIR PHONE HELPS THEM LIVE A FULLER LIFE

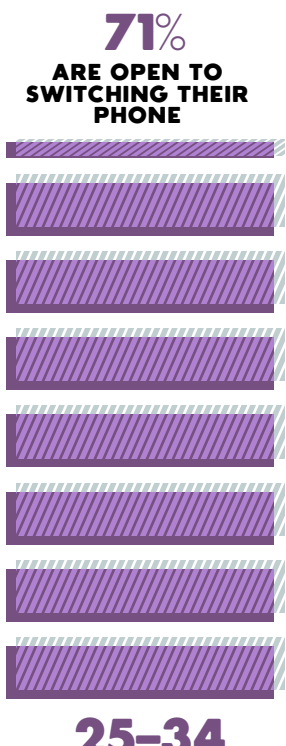
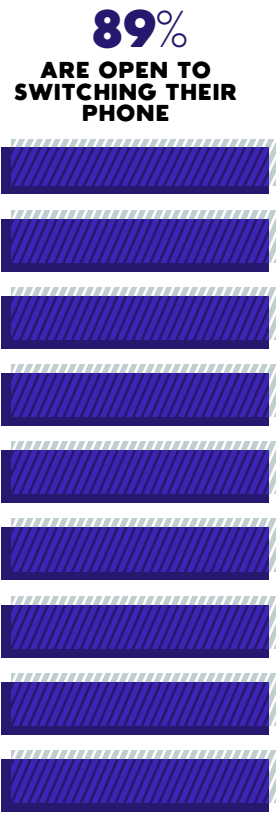
55% SAY THEY SPEND TOO MUCH TIME ON THEIR PHONES

32% SAY THEY GET ANXIOUS WHEN THEY HAVEN'T CHECKED ON THEIR PHONE IN A BIT

THE AGE FACTOR

Younger consumers are open to experiencing different devices as their de-facto brand loyalty is still in flux.

When they do change, younger respondents are more likely to take into account a **company's brand values** when planning on switching for both phone and carrier.



1 IN 3 AMONG 18 TO 24

vs

1 IN 5 AMONG 45 TO 54

“A NEED-TO-KNOW” MENTALITY

TOP PHONE USE, 18-34

1. READING NEWS
2. MANAGING SOCIAL MEDIA
3. STREAMING AUDIO/VIDEO

“I HAVE A STRONG INTEREST IN CURRENT EVENTS/STORIES, POLITICAL AFFAIRS AND HISTORICAL PIECES. ALL THREE HELP SHAPE MY WORLDVIEW AND I USE THIS INFORMATION AS A PART OF MY DAILY WORK AS WELL AS GENERAL UNDERSTANDING OF THE COUNTRY AND WORKS AROUND ME.”

PLUS THEY ARE—

29% MORE LIKELY THAN THE AVERAGE TO SAY THEY GET NERVOUS WHEN THEY HAVEN'T CHECKED ON THEIR PHONE IN A BIT

20% MORE LIKELY TO SAY THEY SPEND TOO MUCH TIME ON THEIR PHONE

A.V. CLUB

DEADSPIN

GIZMODO

JALOPNIK

JEZEBEL

KOTAKU

lifehacker

THE ROOT

THE TAKEOUT

the ONION

the INVENTORY