EUROPE'S DIGITAL PULSE

CONNECTIVITY TRENDS AND CONSUMER INSIGHTS

October 2024

Connect Europe

GAME CHANGERS Ipsos

CONTENTS

INTRODUCTION

1

METHODOLOGY

SAMPLE DESCRIPTION

Adults (18-65 y.o.) in Europe that have fixed internet and a mobile plan.

DATA COLLECTION METHOD

Online on Ipsos panel

SAMPLE SIZE

n = 9600

AVG. INTERVIEW DURATION

15 minutes

QUOTA

For each country:
- Gender
- Age
- Region

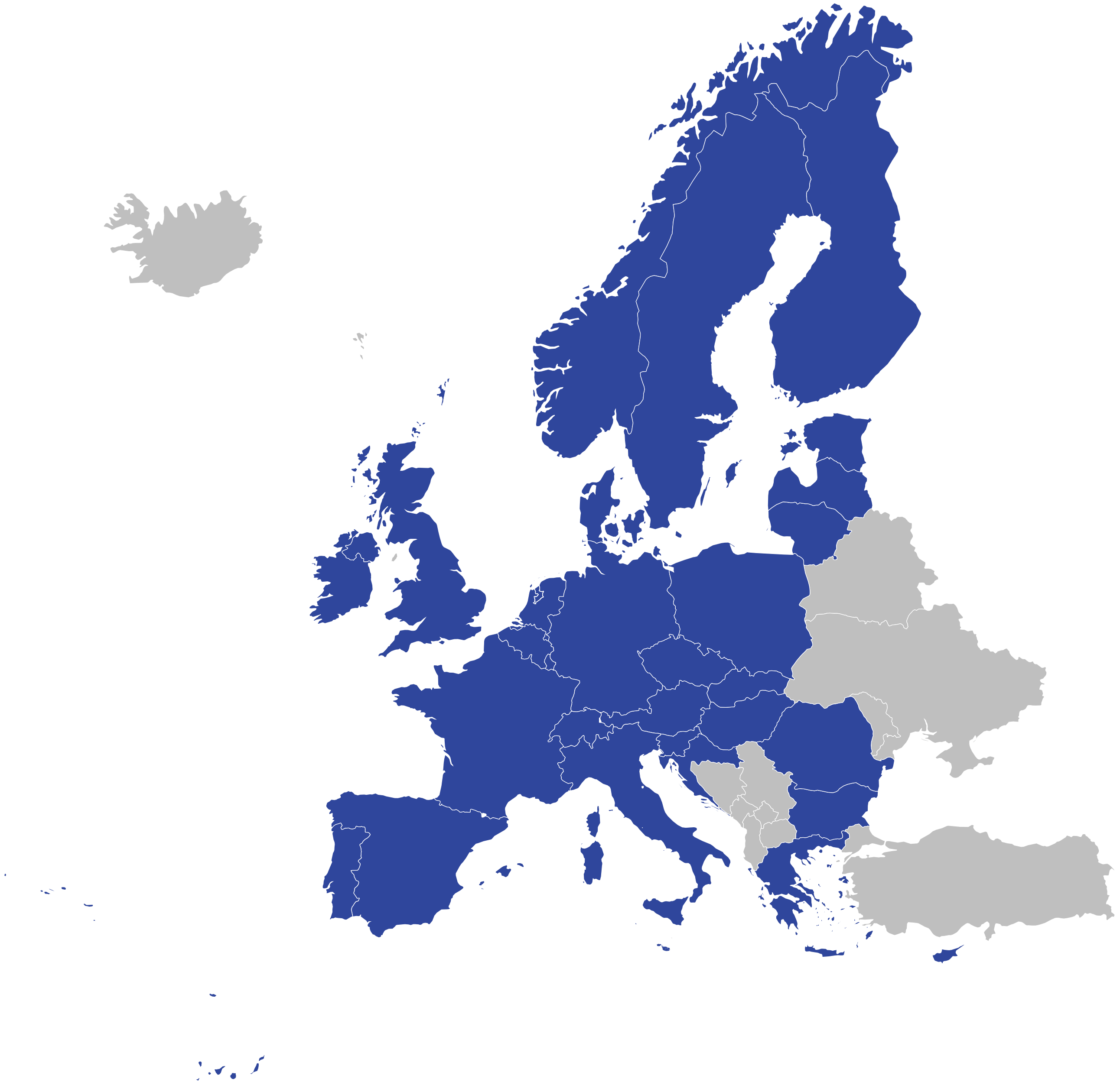
FIELDWORK PERIOD

July-August 2024

GEOGRAPHICAL SCOPE

The study is conducted in 30 countries

1 Austria
2 Belgium
3 Bulgaria
4 Croatia
5 Cyprus
6 Czech Republic
7 Denmark
8 Estonia
9 Finland
10 France
11 Germany
12 Greece
13 Hungary
14 Ireland
15 Italy
16 Latvia
17 Lithuania
18 Luxembourg
19 Malta
20 Netherlands
21 Norway
22 Poland
23 Portugal
24 Romania
25 Slovakia
26 Slovenia
27 Spain
28 Sweden
29 Switzerland
30 United Kingdom



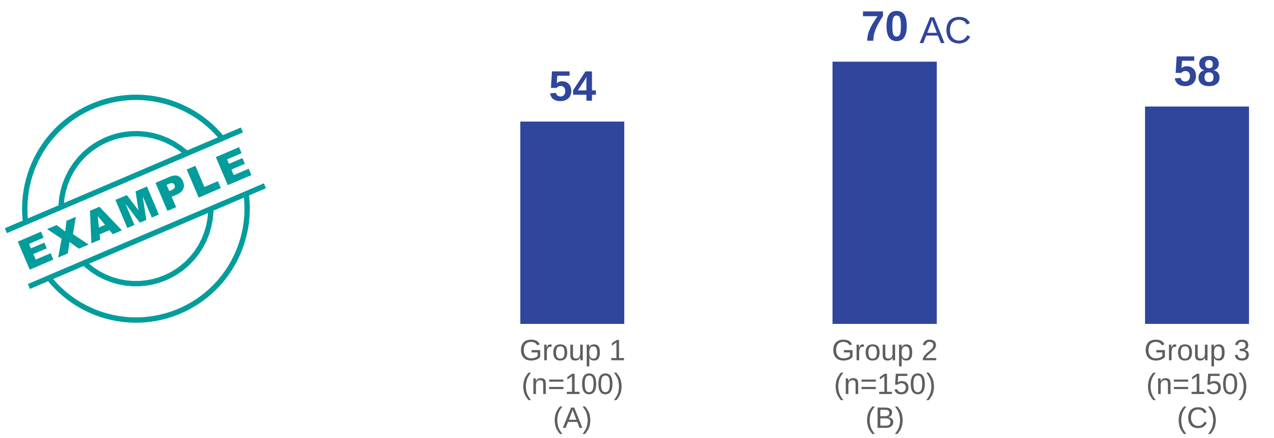
When looking at ‘European’ results, data is weighted according to the population size of the country.

HOW TO READ THE RESULTS

All reported results are **percentages (%)**, unless indicated otherwise.

Significant differences are always tested for at the 95% confidence level.

- Significant differences between groups are marked via A, B, C, …
  - Differences are always indicated with the **highest result** in the comparison.
  - E.g. the indication AC with group 2 denotes a significant difference between 70% (B) and 54% (A) and between 70% (B) and 58% (C).



RESULTS

2

TELECOM PERCEPTION IN EUROPE

2.1

2. Results

WHAT IS THE PERCEPTION OF TELECOM PROVIDERS IN EUROPE?

1 DO PEOPLE HAVE THE SAME PROVIDER FOR FIXED INTERNET AND MOBILE PLAN?

2 HOW SATISFIED ARE EUROPEAN CUSTOMERS?

DO PEOPLE HAVE THE SAME PROVIDER FOR THEIR FIXED INTERNET & MOBILE PLAN?

58%

FIXED INTERNET & MOBILE PLAN AT THE SAME PROVIDER

42%

FIXED INTERNET & MOBILE PLAN AT DIFFERENT PROVIDERS

GENERAL SATISFACTION

Majority of Europeans that have fixed internet and their mobile plan at the same provider give their provider a score of 8 or higher.

BOTH FIXED INTERNET AND MOBILE CLIENTS

64%	25%	11%
SCORE 8-10	SCORE 6-7	SCORE 0-5

Base: Customers that have fixed internet and mobile at the same provider (n=5358)

Question: P1. Please use a number from 0 to 10 to indicate to what extent you are generally satisfied with […]. A score of 10 means you are 'extremely satisfied', a score of 0 means you are 'extremely dissatisfied'

WHAT IS THE PERCEPTION OF TELECOM PROVIDERS IN EUROPE?

- ✓ Do people have the same provider for fixed internet and mobile plan?
- ✓ How satisfied are European customers?

1

MOST HAVE FIXED INTERNET AND MOBILE PLAN AT THE SAME PROVIDER

58% indicate having the same provider for fixed internet and mobile plan, whereas 42% say they have fixed internet and mobile plan at different providers.

2

IN GENERAL, EUROPEANS ARE SATISFIED WITH THEIR PROVIDER

89% of fixed internet and mobile customers gave their provider a score of 6 or higher.

CONSUMER CHOICE AND COMPETITIVE MARKETS

2.2

2. Results

HOW DO EUROPEANS CHOOSE THEIR TELECOM PROVIDER?

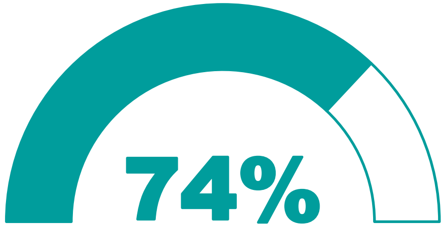
1 IS THERE SUFFICIENT CHOICE?

2 WHAT IS IMPORTANT WHEN CHOOSING PROVIDERS?

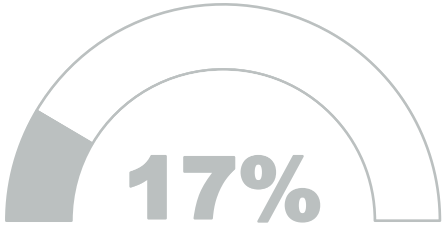
3 HOW DO EUROPEANS FEEL ABOUT SWITCHING PROVIDERS?

“THERE ARE ENOUGH TELECOM PROVIDERS TO CHOOSE FROM”

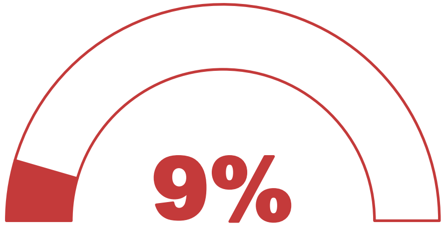
Most Europeans agree that there are enough providers to choose from.



AGREE (totally agree + somewhat agree)



NEITHER AGREE, NOR DISAGREE

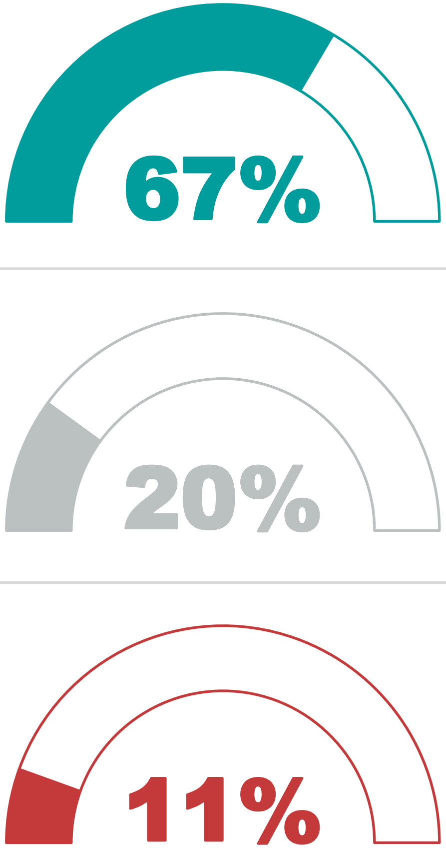


DISAGREE (totally disagree + somewhat disagree)

Base: Europe (n=9600)
Question: C1. When considering telecommunications providers, to what extent do you agree with the following statements? – There are enough telecom providers to choose from

“THERE IS ENOUGH CHOICE AND VARIETY IN THE OFFERS PROVIDED BY TELECOM PROVIDERS”

Majority of Europeans agree that there is enough choice and variety in the offers provided.



AGREE (totally agree + somewhat agree)

NEITHER AGREE, NOR DISAGREE

DISAGREE (totally disagree + somewhat disagree)

Base: Europe (n=9600)
Question: C1. When considering telecommunications providers, to what extent do you agree with the following statements? – There is enough choice and variety in the offers provided by telecom providers

FIXED INTERNET: WHAT IS MOST IMPORTANT WHEN CHOOSING A NEW PROVIDER?

TOP DRIVERS – 40%+

- monthly price to be paid **(59%)**
- reliability of connection **(49%)**
- (upload/download) speed of internet **(45%)**
- quality and range of the Wi-Fi signal **(43%)**

IMPORTANT DRIVERS 20% - 40%

- good customer service **(37%)**
- network security **(36%)**
- free activation/installation **(30%)**
- offers the tariff plan that best suits my needs **(30%)**
- benefits for loyal customers **(26%)**
- special offer **(24%)**
- flexible packs that I can personalize to suit my needs **(23%)**

LESS IMPORTANT DRIVERS <20%

- download volume included (19%)
- possibility of adjusting my subscription myself (18%)
- availability of environmentally friendly fibre optics (16%)
- advice from friends/family, positive experiences from them (12%)
- same provider as other telecom services (10%)
- sustainability measures taken by the provider (10%)
- this provider offers fully digital subscriptions (10%)
- accessibility of shops (10%)

Base: Europe (n=9600)
Question: C2B. Suppose you have to choose a new telecom provider for fixed internet. What are the most important criteria for you when choosing a new provider?

FIXED INTERNET: SWITCHING BEHAVIOUR

Most Europeans agree that switching provider is simple and quick and nearly 4 out of 10 already switched providers for fixed internet in the past 5 years.

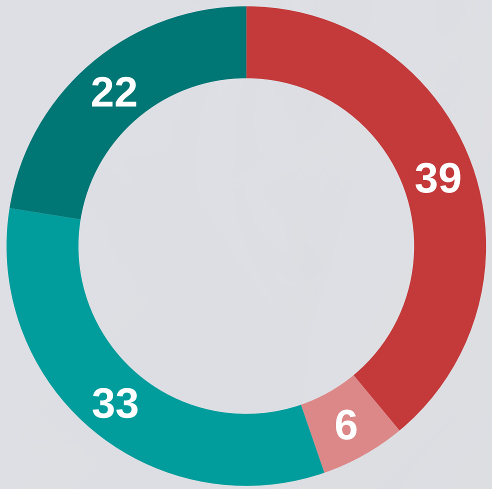
SWITCHING PROVIDERS IS SIMPLE AND QUICK

58% **AGREE**
(totally agree + somewhat agree)

25% **NEITHER AGREE, NOR DISAGREE**

17% **DISAGREE**
(totally disagree + somewhat disagree)

SWITCHED FROM PROVIDER FOR FIXED INTERNET IN PAST 5 YEARS



Base: Europe (n=9600)
Question: C1. When considering telecommunications providers, to what extent do you agree with the following statements?
C3B. Have you switched telecom providers in the past 5 years for your fixed internet? / C4B. Are you planning to switch telecom providers in the next 6 months for your fixed internet?

MOBILE PLAN: WHAT IS MOST IMPORTANT WHEN CHOOSING A NEW PROVIDER?

TOP DRIVERS – 40%+

- monthly price to be paid **(60%)**
- quality of the mobile network **(53%)**
- mobile network coverage **(47%)**

IMPORTANT DRIVERS 20% - 40%

- good customer service **(38%)**
- mobile data volume **(37%)**
- offers the tariff plan that best suits my needs **(36%)**
- 5G coverage **(30%)**
- benefits for loyal customers **(29%)**
- special offer **(25%)**
- possibility of making adjustments to my subscription myself **(22%)**

LESS IMPORTANT DRIVERS <20%

- tariffs/options for international calling or roaming (20%)
- option to buy smartphone together with my subscription for a good price (18%)
- advice from friends/family, positive experiences from friends/family (15%)
- extra options for mobile (e.g. setting a data limit, call forwarding, extra voicemail options, etc.) (14%)
- sustainability measures taken by the provider (11%)
- same provider as other telecom services (11%)
- accessibility of shops (10%)
- this provider offers fully digital subscriptions (10%)

Base: Europe (n=9600)
Question: C2A. Suppose you have to choose a new telecom provider for a mobile plan. What are the most important criteria for you when choosing a new provider?

MOBILE PLAN: SWITCHING BEHAVIOUR

More Europeans switched provider for their mobile plan compared to fixed internet, more than 4 out of 10 also indicate having already switched providers for mobile in the past 5 years.

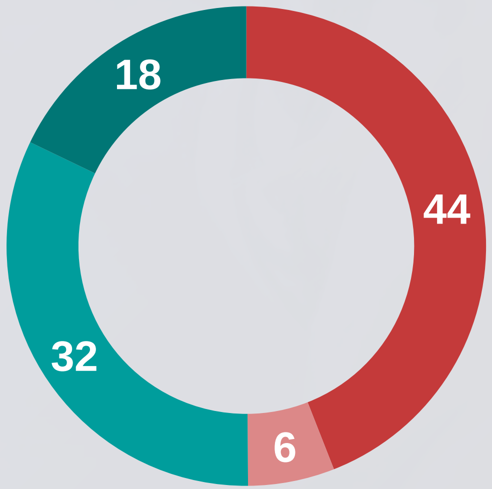
SWITCHING PROVIDERS IS SIMPLE AND QUICK

58% **AGREE**
(totally agree + somewhat agree)

25% **NEITHER AGREE, NOR DISAGREE**

17% **DISAGREE**
(totally disagree + somewhat disagree)

SWITCHED FROM PROVIDER FOR MOBILE PLAN IN PAST 5 YEARS



- Yes, I already switched provider in the past 5 years
- No, but planning to switch provider in the next 6 months
- No, I haven’t switched provider in the past 5 years
- No, I have never switched provider

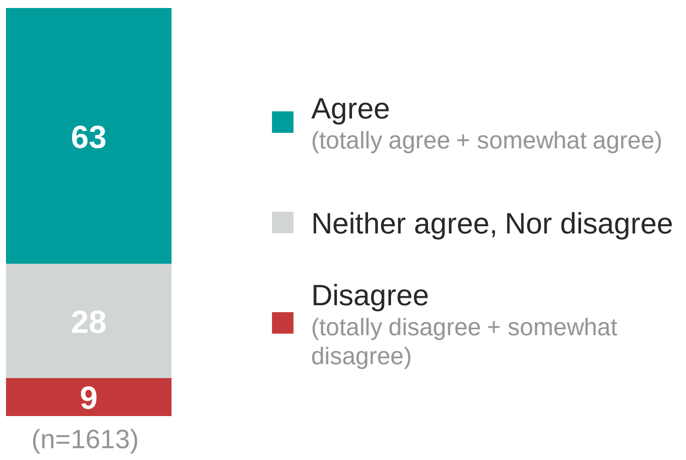
Base: *Europe (n=9600)*
Question: *C1. When considering telecommunications providers, to what extent do you agree with the following statements?*
C3A. Have you switched telecom providers in the past 5 years for your mobile plan? / C4A. Are you planning to switch telecom providers in the next 6 months for your mobile plan?

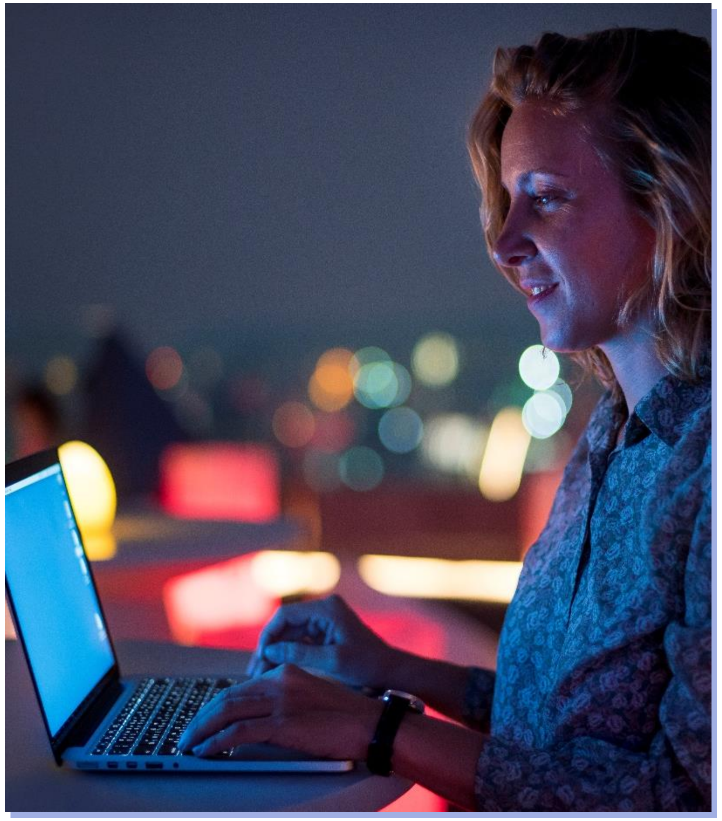
ROLE OF HIGH-PERFORMANCE CONNECTIVITY FOR BUSINESSES

Majority of business owners find high-performance connectivity important, as more than half gives a score of 80+. Most also agree that new network technologies, such as 5G and fibre present an opportunity to improve and grow their business.

How essential is high-performance connectivity (internet, mobile, etc.) to conduct your business in its current state? On a scale of 0 to 100?

New network technologies like 5G and fibre optics present an opportunity to improve and grow my business





Base: Self-employed and small business owners (<10 employees) (n=1613)

Question: B1. How essential is high performance connectivity (internet, mobile, etc.) to conduct your business in its current state?
B2. To what extent do you agree with the following statement: "New network technologies like 5G [PROG: POP-UP "fifth generation of cellular networks, offering faster speeds, lower latency and greater capacity"] and fibre optics [PROG: POP-UP "thin flexible strands of glass/plastic that use light to transmit data over long distances at high speeds"] present an opportunity to improve and grow my business"

HOW DO EUROPEANS CHOOSE THEIR TELECOM PROVIDER?

- ✓ Is there sufficient choice?
- ✓ What is important when choosing providers?
- ✓ How do Europeans feel about switching providers?

1

EUROPEAN CONSUMERS GENERALLY FEEL THERE IS SUFFICIENT CHOICE AND COMPETITION IN THE TELECOM MARKET

More than 7 out of 10 agree there are enough providers to choose from, however there are differences depending on the country of residence.

2

PRICE REMAINS A KEY DRIVER FOR CHOOSING A PROVIDER FOR BOTH FIXED INTERNET AND MOBILE

Network reliability and download speed is also important when considering fixed internet provider, and network coverage when considering a provider for mobile plan. Less important drivers include sustainability measures, fully digital subscriptions or shop accessibility.

3

MOST AGREE SWITCHING PROVIDERS IS EASY, BUT A MAJORITY DOES NOT FREQUENTLY SWITCH PROVIDERS

58% agree that switching is quick and easy and about 4 out of 10 have already switched providers in the past 5 years for either mobile or fixed internet.

PRICE TRENDS AND AFFORDABILITY

2.3

2. Results

HOW DO EUROPEANS FEEL ABOUT PRICE TRENDS IN RECENT YEARS?

1 ARE TELECOM SERVICES STILL AFFORDABLE?

2 WHO SHOULD BE RESPONSIBLE FOR AFFORDABLE TELECOM SERVICES?

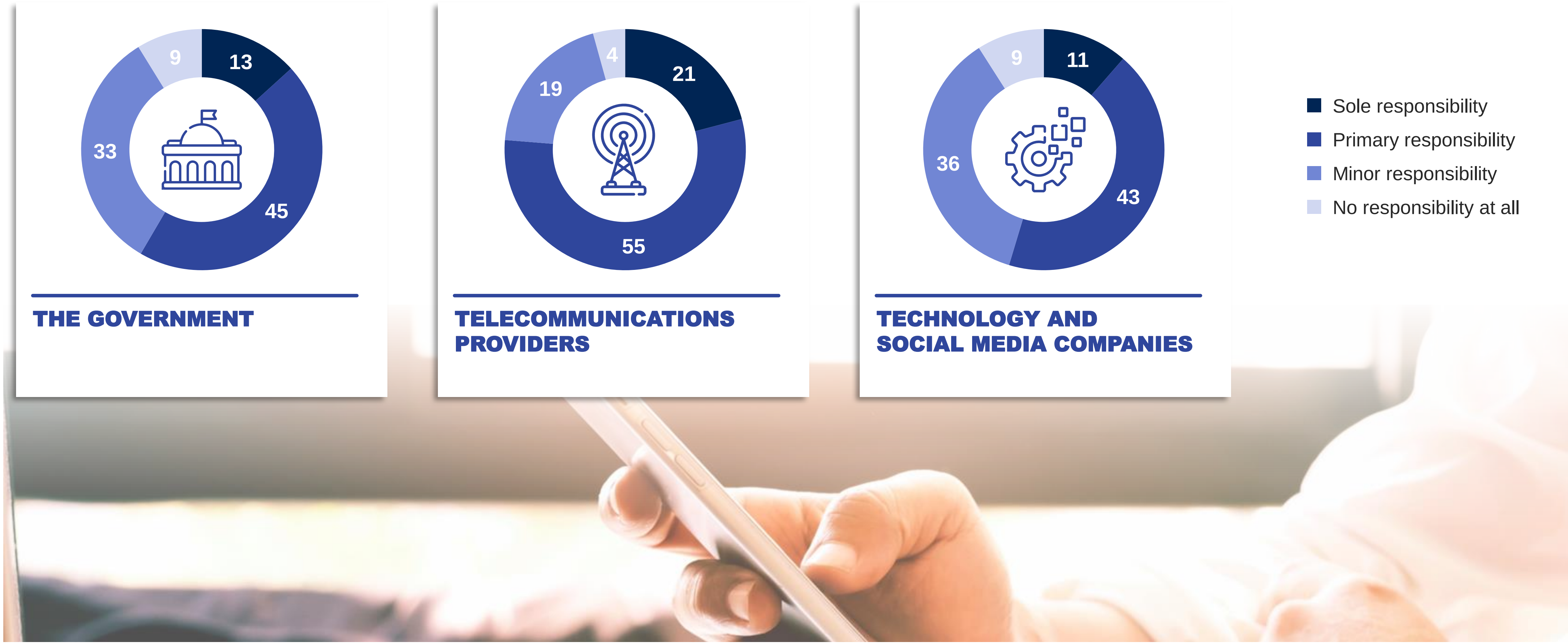
3 ARE EUROPEANS WILLING TO ACCEPT LOWER QUALITY FOR MORE AFFORDABLE SERVICES?

85%

Thinks that telecom services (mobile phone, internet, etc.) are a basic need, and something that everyone should have access to

RESPONSIBILITY AFFORDABLE ACCESS CONNECTIVITY SERVICES

Europeans believe providing affordable access is a shared responsibility of the government, telecommunications providers and technology and social media companies.



Base: Europe (n=9600)

Question: P9. How much responsibility do you think each of the following should have in ensuring affordable access to connectivity services such as internet and mobile?

“PRICE FOR MY TELECOM SERVICES IS GOOD VALUE FOR MONEY”

Most believe the price they pay for their telecom services is good value for money. About 1 in 5 disagrees.

60%

AGREE (totally agree + somewhat agree)

20%

NEITHER AGREE, NOR DISAGREE

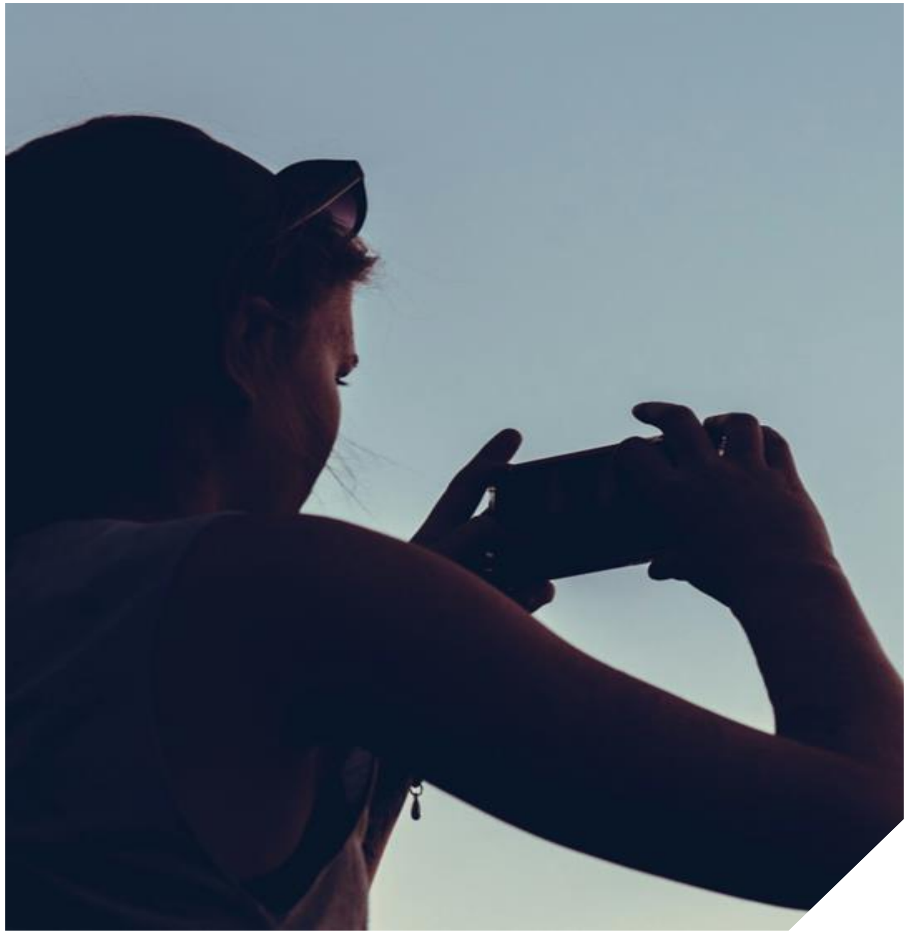
20%

DISAGREE (totally disagree + somewhat disagree)

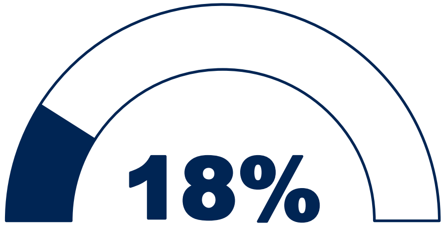
Base: Europe (n=9600)
Question: P4. Do you think the price that is charged per month […] for the telecom products in your household is good value for money?

PERCEIVED PRICE INCREASE OF TELECOM PRODUCTS IN PAST 3 YEARS

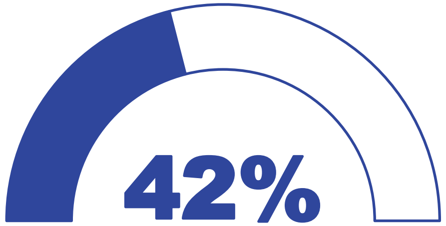
Most claim price of their telecom products has increased over the past 3 years.



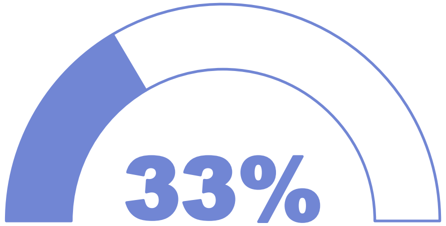
SUBSTANTIALLY INCREASED



SLIGHTLY INCREASED



STAYED ABOUT THE SAME

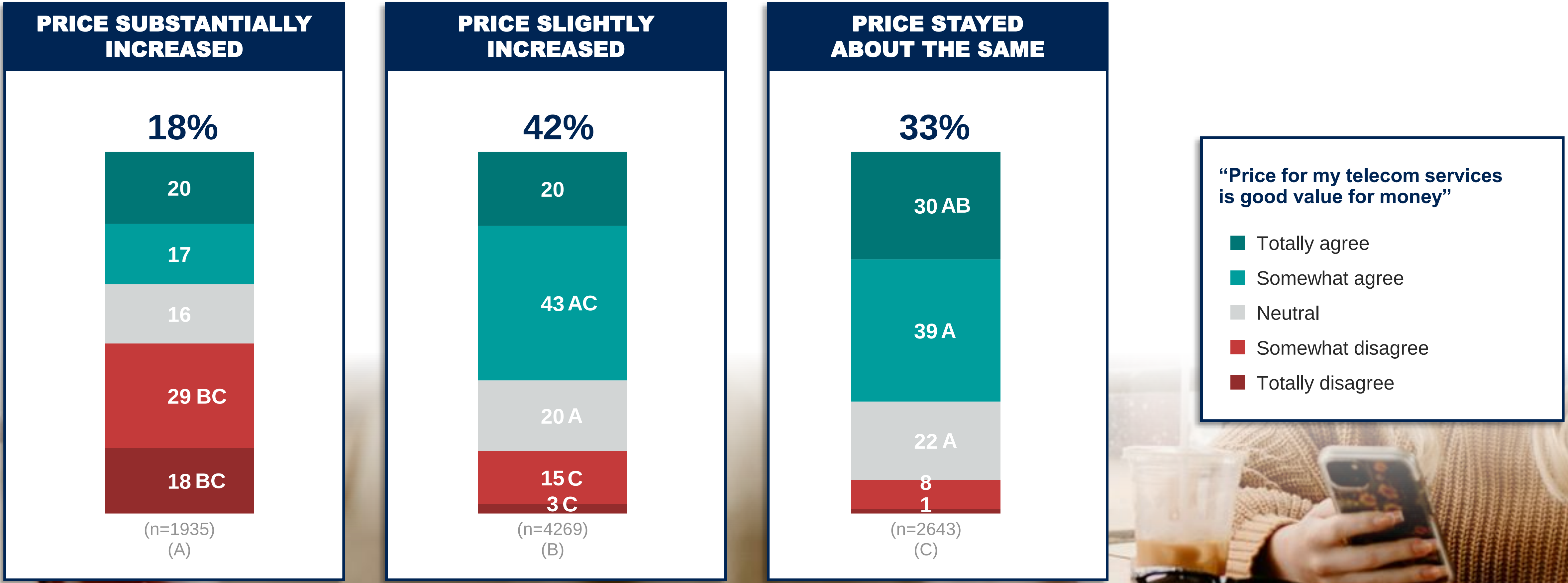


DECREASED
(substantially decreased + slightly decreased)

Base: Europe (n=9600)
Question: P5. How has the price of your telecom products changed over the past 3 years?

VALUE FOR MONEY – BY PERCEIVED PRICE INCREASE

The higher the perceived price increase, the more dissatisfied people are about the value for money of their telecom services.



Base: Europe (n=9600)

Question: P5. How has the price of your telecom products changed over the past 3 years?
P4. Do you think the price that is charged per month […] for the telecom products in your household is good value for money?

Price decreased or don't know not included in break.

WOULD EUROPEANS ACCEPT LOWER QUALITY IN EXCHANGE FOR A LOWER PRICE?

About 1 in 3 are open to lower video quality in exchange for a lower price. Europeans are least open to slower maximum internet speed. In general, younger people are more open to giving up quality in exchange for a more affordable price.

T2: Definitely or probably yes	TOTAL (n=9600)	AGE 18 – 29 (n=1814) – (A)	AGE 30 – 54 (n=5553) – (B)	AGE 55 – 65 (n=2233) – (C)
Video quality of 720p (HD) instead of 1080p (Full-HD) when watching videos online (laptop or smartphone) via Wi-Fi	38	43 C	40 C	30
Video quality of 720p (HD) instead of 1080p (Full-HD) when watching videos online via 4G/5G	38	45 BC	39 C	29
Video quality of 720p (HD) instead of 1080p (Full-HD) when watching television	32	39 BC	34 C	24
Worse latency while gaming (e.g. causing slower reaction time, disconnection or interruptions, etc.)	30	34 C	31 C	26
Slower maximum internet (download/upload) speed	26	30 C	27 C	21

Base: Europe (n=9600)
Question: P7. In which of these situations would you be willing to accept lower quality in exchange for a lower price?

HOW DO EUROPEANS FEEL ABOUT PRICE TRENDS IN RECENT YEARS?

- ✓ Are telecom services still affordable?
- ✓ Who should be responsible for affordable telecom services?
- ✓ Are Europeans willing to accept lower quality for more affordable services?

1

TELECOM AFFORDABILITY REMAINS A KEY FACTOR DESPITE THE PERCEIVED VALUE OF SERVICES

While 6 out of 10 think the services offer good value, 6 out of 10 also claim to have seen price increases recently. Mainly people who experienced significant price increases are dissatisfied.

2

TELECOM SERVICES ARE A BASIC NEED, SAFEGUARDING ITS AFFORDABILITY IS SEEN AS A SHARED RESPONSIBILITY OF (TELECOM AND TECH) COMPANIES AND THE GOVERNMENT

85% of Europeans believe telecom services are a basic need. When asked for responsibility to make telecom services affordable, people indicate that both telecom providers, the government and technology companies should be responsible.

3

VIDEO QUALITY TRADEOFFS FOR LOWER PRICE HAVE MODERATE APPEAL, LESS APPEAL FOR SLOWER INTERNET SPEED

About 1 in 3 would accept lower video quality to reduce costs. Willingness is higher amongst younger demographics. Only few are willing to accept slower internet speed for affordability.

DATA SECURITY ATTITUDE & BEHAVIOUR

2.4

2. Results

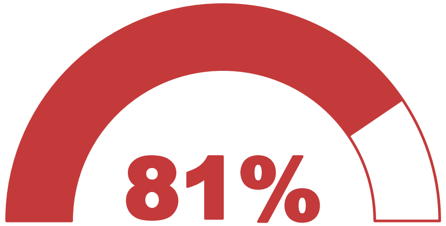
WHAT DO EUROPEANS THINK ABOUT THE SECURITY OF THEIR PERSONAL DATA?

1. ARE EUROPEANS CONCERNED ABOUT THE SECURITY OF THEIR PERSONAL DATA?
2. DO EUROPEANS TRUST THEIR TELECOMMUNICATIONS PROVIDER IN TERMS OF DATA SECURITY?
3. WHO SHOULD BE RESPONSIBLE FOR THE SECURITY OF PERSONAL DATA?
4. HOW DO EUROPEANS PROTECT THEIR DATA?

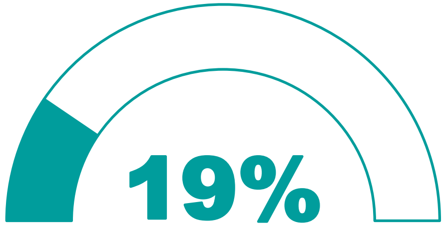
CONCERNED ABOUT SECURITY OF PERSONAL DATA

Most are concerned about the security of their personal data.

CONCERNED
(very concerned + concerned + fairly concerned)



UNCONCERNED
(not at all concerned + fairly unconcerned)

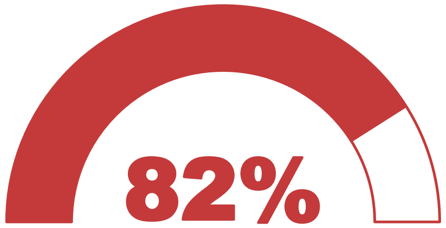


Base: Europe (n=9600)
Question: D1. How concerned are you about the security of your personal data?

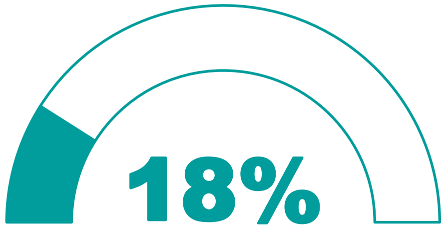
CONCERNED ABOUT CHILDREN SMARTPHONE USAGE

Most parents are concerned about the smartphone usage of their children.

CONCERNED
(very concerned + concerned + fairly concerned)



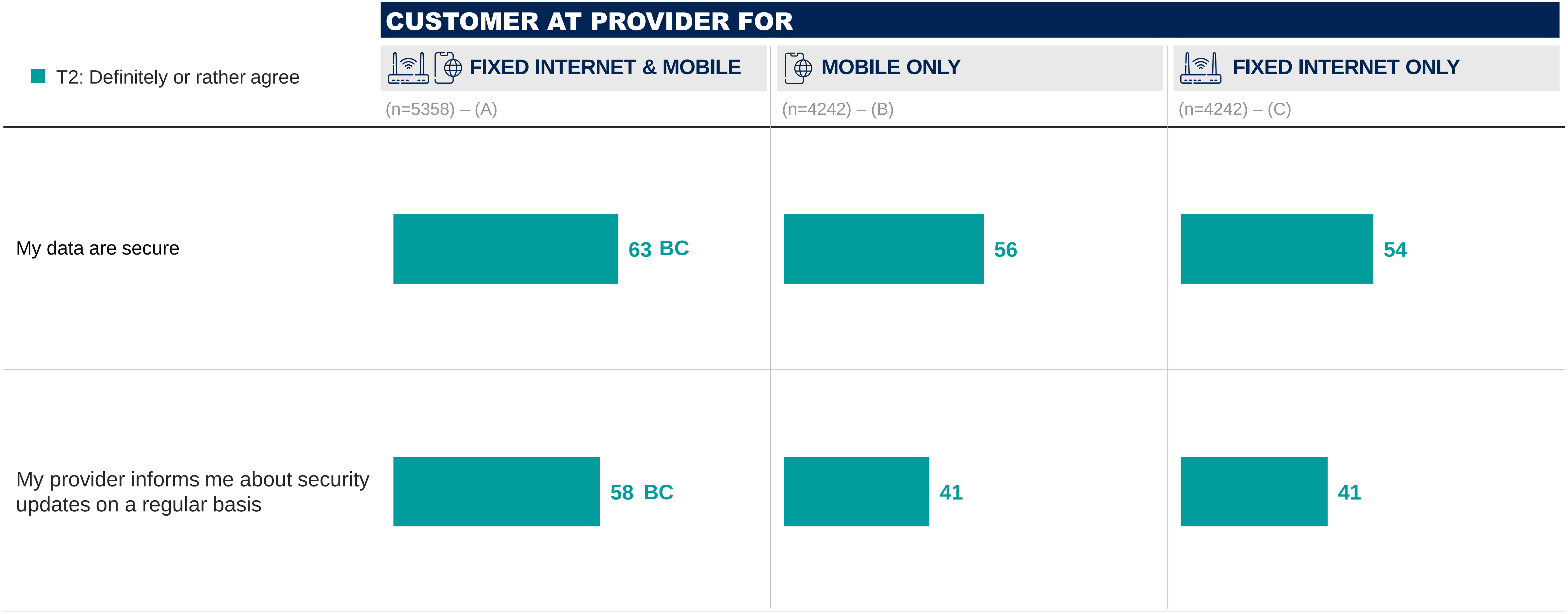
UNCONCERNED
(not at all concerned + fairly unconcerned)



Base: Parents with children younger than 18 in Europe (n=3706)
Question: D2. How concerned are you about your children's smartphone usage?

DATA SECURITY AND INFORMATION RECEIVED BY PROVIDER

Majority of customers with fixed internet and mobile at the same provider believe their data are secure and that their provider regularly informs them about security updates. Mobile only and fixed internet customers less often believe their data is secure or that they receive regular updates on security by their provider.



Base: *Europe (n=9600)*
Question: *P2. To what extent do you agree with the following statements about {@}?*

TRUST IN PROVIDERS

Majority is confident and trusts their provider in terms of security and data protection. Most also have more trust in their telecom provider compared to messaging apps companies.

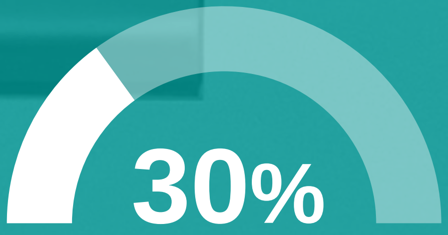
T2: Definitely or rather agree	TOTAL	AGE			HOUSEHOLD		
		18 – 29	30 – 54	55 – 65	LIVING ALONE	FAMILY NO KIDS <18	FAMILY WITH KIDS <18
	(n=9600)	(n=1814) – (A)	(n=5553) – (B)	(n=2233) – (C)	(n=1569) – (D)	(n=4325) – (E)	(n=3706) – (F)
"I am confident that my telecom provider has the necessary knowledge and capabilities to offer a certain level of security."	66	64	65	69 AB	63	65	68 DE
"I trust my telecom provider to protect my data security and privacy."	62	59	61	65 AB	57	62 D	64 D
"I believe that telecom providers protect my data better than social media companies such as WhatsApp, Meta (Facebook, Instagram), TikTok, etc."	59	62 BC	59	58	56	58	62 DE

Base: Europe (n=9600)
Question: D3. Below are a couple of statements about your telecom provider's security. To what extent do you agree with each of these statements?

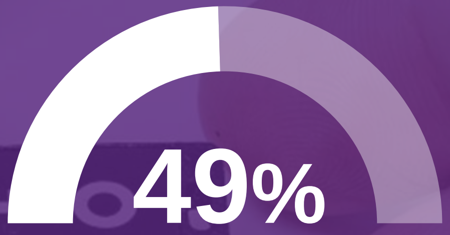
FEEL ABOUT RESPONSIBILITY FOR DATA SECURITY

Most believe that data security is a shared responsibility between the user and the companies storing the data.

The responsibility for ensuring the security of my personal data lies primarily with me



The responsibility for ensuring the security of my personal data lies entirely with the companies storing/using my data compliant with EU regulations



The responsibility for ensuring the security of my personal data is shared between me and the companies storing/using my data compliant with EU regulations

Base: Europe (n=9600)

Question: D4. Which of these statements best describes how you feel about responsibility for data security?

WHAT SECURITY MEASURES DO YOU TAKE TO PROTECT YOUR DATA?

TOP 5 MEASURES TAKEN

59%

I don’t share my passwords with anyone

48%

I limit the amount of personal information I share online on social media

48%

I regularly update my devices and applications (smartphone, computer, etc.)

45%

I use strong and unique passwords

45%

My Wi-Fi is secured with a strong password

Base: *Europe (n=9600)*
Question: *D5. What security measures do you take to protect your data?*

WHAT DO EUROPEANS THINK ABOUT THE SECURITY OF THEIR PERSONAL DATA?

- ✓ Are Europeans concerned about the security of their personal data?
- ✓ Do Europeans trust their telecommunications provider in terms of data security?
- ✓ Who should be responsible for the security of personal data?
- ✓ How do Europeans protect their data?

1

EUROPEANS ARE CONCERNED ABOUT THEIR DATA SECURITY

81% of Europeans are concerned about their security of personal data. 82% are also concerned about smartphone usage of their children.

2

TRUST IS HIGHER IN TELECOM PROVIDERS COMPARED TO SOCIAL MEDIA COMPANIES

59% of Europeans believe that telecom providers protect data better than social media companies such as WhatsApp, Meta and TikTok.

3

MOST FIND SECURING THEIR DATA A SHARED RESPONSIBILITY BETWEEN THE COMPANY AND USER

49% believe that both they and the company using or storing personal data as well share responsibility for ensuring the security of their personal data.

4

EUROPEANS' BEHAVIOUR IS NOT IN LINE WITH THEIR SECURITY CONCERNS: MANY STILL SHARE THEIR PASSWORD OR DON'T USE STRONG PASSWORDS

59% don't share their password(s) with anyone. Only 45% indicate using strong and unique passwords.

TELECOM PROVIDERS' SUSTAINABILITY ROLE

2.5

2. Results

WHAT ROLE SHOULD SUSTAINABILITY PLAY FOR TELECOM PROVIDERS?

1 DO EUROPEANS BELIEVE TELECOMMUNICATION PROVIDERS SHOULD BE SUSTAINABLE?

2 WOULD EUROPEANS ACCEPT LOWER VIDEO QUALITY TO REDUCE ENERGY CONSUMPTION?

3 HOW KNOWLEDGEABLE ARE EUROPEANS ABOUT SUSTAINABILITY OF NEXT-GEN TECHNOLOGIES SUCH AS FIBRE AND 5G?

“DO YOU FIND IT IMPORTANT THAT YOUR PROVIDER IS SUSTAINABLE?

Sustainability of their provider is important for Europeans.

82%

IMPORTANT (very important + important+ somewhat important)

18%

NOT IMPORTANT (not at all important + somewhat unimportant)

Base: Europe (n=9600)
Question: S1. Do you find it important that your telecom provider is environmentally sustainable?

CLAIMED IMPORTANCE SUSTAINABILITY

Large majority of Europeans find it important that their provider is sustainable …

82%

VS

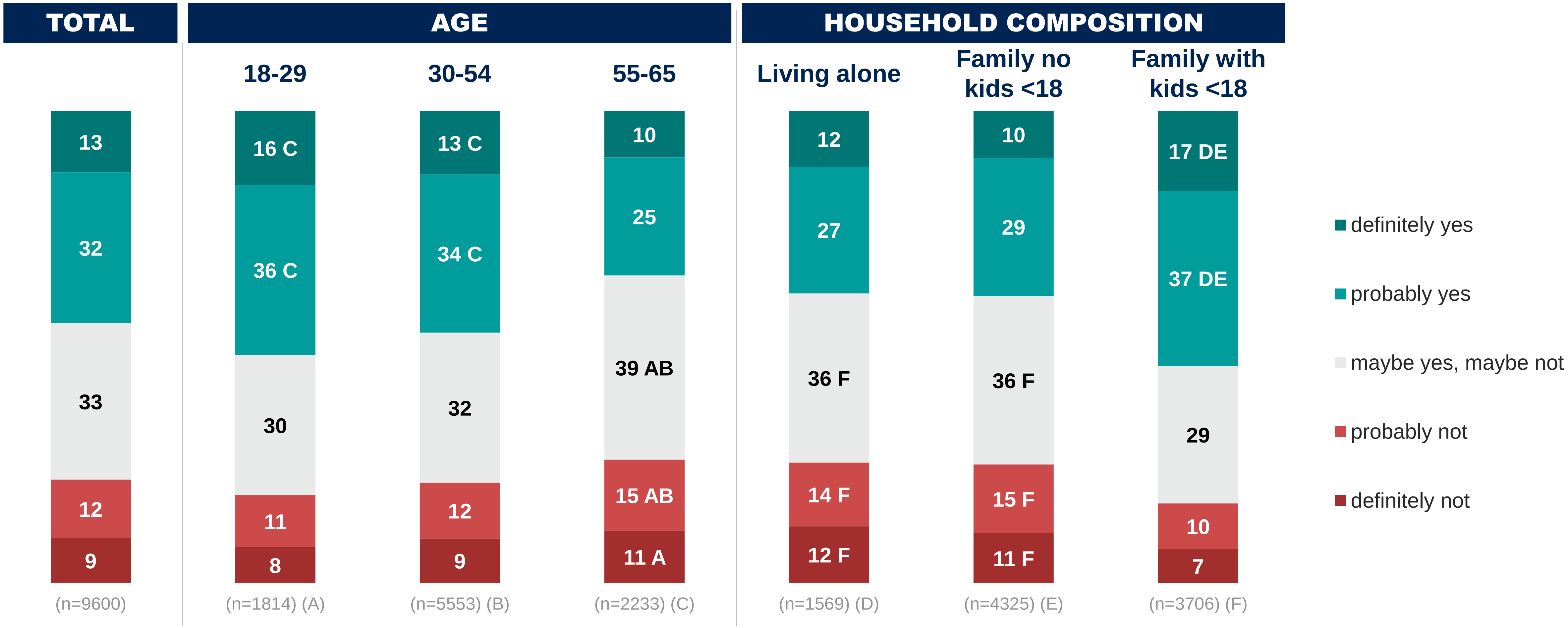
… however, only 1 in 10 mentions sustainability as a choice driver when considering a provider for fixed internet

10%

Base: Europe (n=9600)
Question: S1. Do you find it important that your telecom provider is environmentally sustainable?
C2B. Suppose you must choose a new telecom provider for fixed internet. What are the most important criteria for you when choosing a new provider?

ARE PEOPLE WILLING TO ACCEPT LOWER VIDEO QUALITY IN EXCHANGE FOR HIGHER SUSTAINABILITY?

Nearly half of Europeans is open to accepting lower video quality in exchange for higher sustainability. Younger people aged 18-54 are more open compared to those aged 55+.



Base: Europe (n=9600)
Question: Streaming in higher video quality consumes at least 40% more data, increasing energy consumption of telecom providers to deliver the content. Would you be willing to accept a lower video quality (e.g. 720p HD instead of 1080p Full-HD) in exchange for higher sustainability thanks to lower energy consumption?

Europeans are not very knowledgeable about sustainability of new technologies such as fibre and data consumption of watching videos in higher quality.

■ % “True”

	TOTAL	AGE			HOUSEHOLD COMPOSITION		
		18-29	30-54	55-65	Living alone	Family no kids <18	Family with kids <18
	(n=9600)	(n=1814) – (A)	(n=5553) – (B)	(n=2233) – (C)	(n=1569) – (D)	(n=4325) – (E)	(n=3706) – (F)
“Fibre is more sustainable than traditional phone lines”	48	48	46	51 B	40	48 D	52 DE
“Watching videos in higher video quality consumes at least 40% more data	43	46 C	44 C	38	39	40	49 DE
“My privacy is better protected sending messages via text compared to sending messages via Instagram or Messenger”	36	44 BC	36 C	31	34	33	41 DE
“Mobile networks 4G/5G use a lot more energy than fixed networks (e.g. fibre, etc.)”	36	41 BC	37 C	32	32	33	42 DE

Base: Europe (n=9600)
Question: S4. Next you will be given several statements. For each statement, indicate whether you believe it is true or false or that you don’t know.

WHAT ROLE SHOULD SUSTAINABILITY PLAY FOR TELECOM PROVIDERS?

- ✓ Do Europeans believe providers should be sustainable?
- ✓ Would Europeans accept a lower video quality to reduce energy consumption?
- ✓ How knowledgeable are Europeans about sustainability of next-gen technologies such as fibre and 5G?

1

SUSTAINABILITY IS PERCEIVED AS IMPORTANT, HOWEVER MOST DON'T CONSIDER IT WHEN CHOOSING THEIR PROVIDER

82% of Europeans find it important that their provider is sustainable, however only 1 in 10 considers sustainability when choosing their telecom provider.

2

LOWER VIDEO QUALITY TO LIMIT ENERGY CONSUMPTION HAS MODERATE APPEAL

About 4 out of 10 claim to be willing to accept lower video quality if that would lower energy consumption. Appeal is higher amongst youngsters.

3

MOST PEOPLE ARE UNAWARE OF THE ENVIRONMENTAL BENEFIT OF NEXT-GEN TECHNOLOGY

Only 48% believe fibre is more sustainable compared to traditional phone lines.

THANK YOU!

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GAME CHANGERS

Ipsos