



Deep-dive Brazil



Deep-dive Brazil Summary findings



2/3 of survey participants below 35 y.o. are willing to sacrifice one or more daily activities (gym, eating out, etc.) for their smartphone



Staying connected via the smartphone is among top-3 most important things for people above 25 y.o.



Quality of service is the most important component of telco offering for almost 3/4 of subscribers



Virtual reality is the technology that most excites Brazilian people

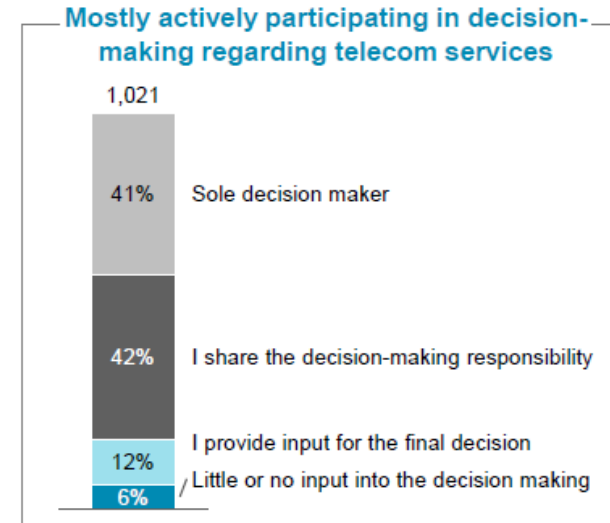
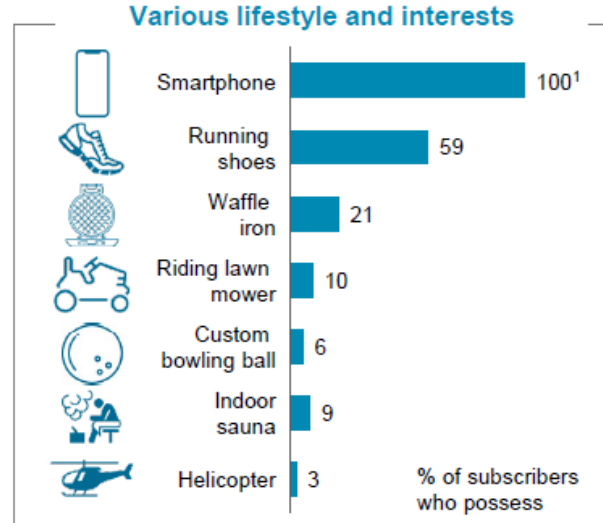
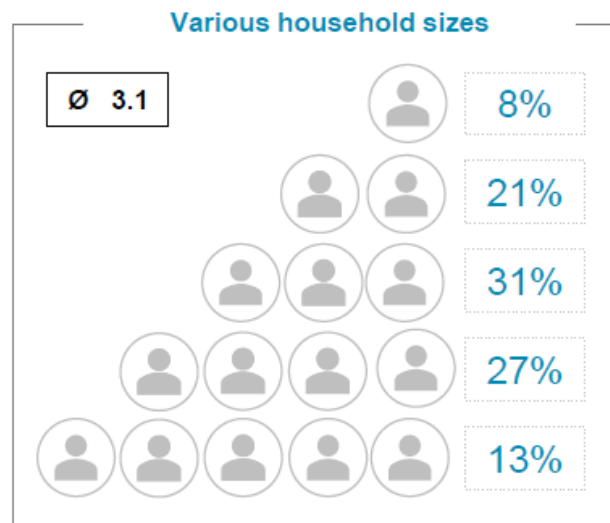
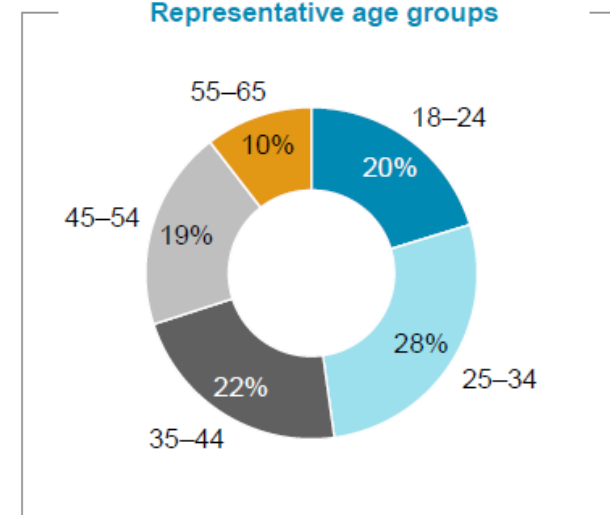
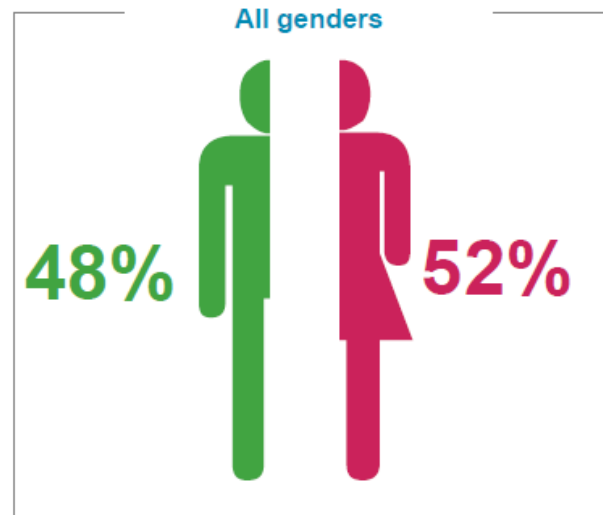


People trust Google and Apple with regard to protecting their personal data, more than they do trust their mobile provider



Overview: Survey participants – Who are they?

Survey has been conducted to reveal customers perception of tech developments and role of the telecom providers



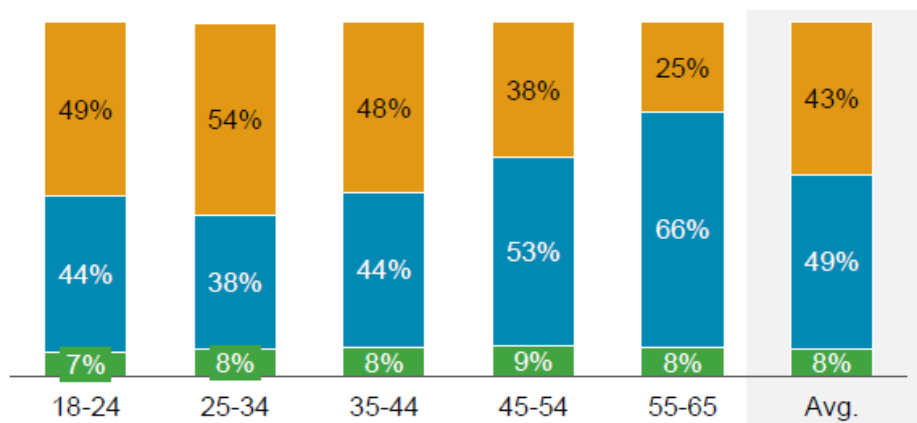
1. Qualifying question



Smartphone affinity

Older generations have more pragmatic perception of their smartphone and to lesser extent ready to sacrifice other activities in favor of their smartphone

What best describes your smartphone usage?



IT'S MY LIFE

I use my smartphone from the moment I wake up to the moment I go to sleep

IT'S A NECESSITY

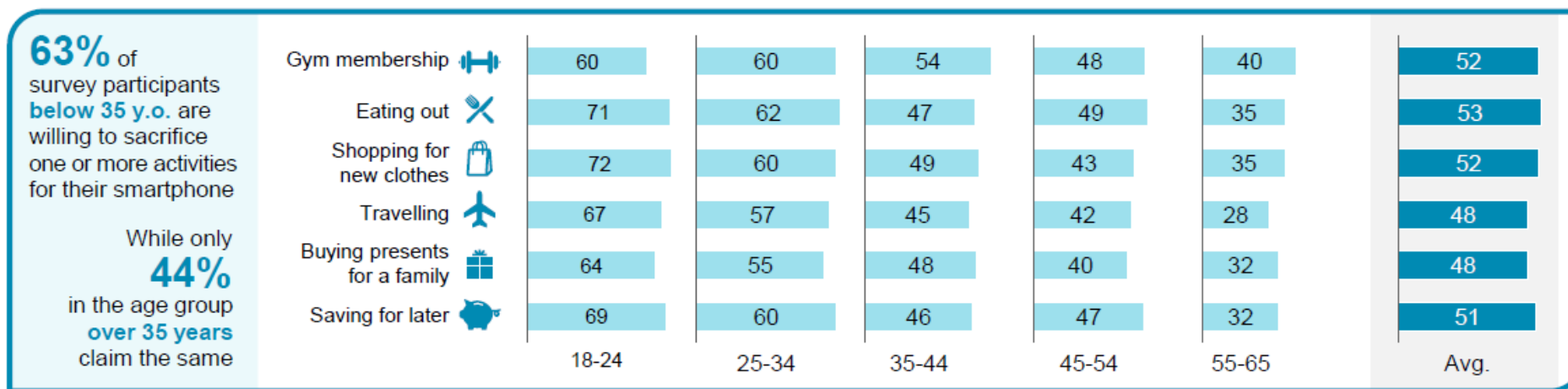
I use my smartphone for calls, messaging and for basic needs (i.e. checking the news and local weather)

IT'S A TOOL

I only use my smartphone for calls and messaging

I would rather spend money on my smartphone (hardware & contract) than...

% of survey participants who answered "Strongly agree" or "agree"

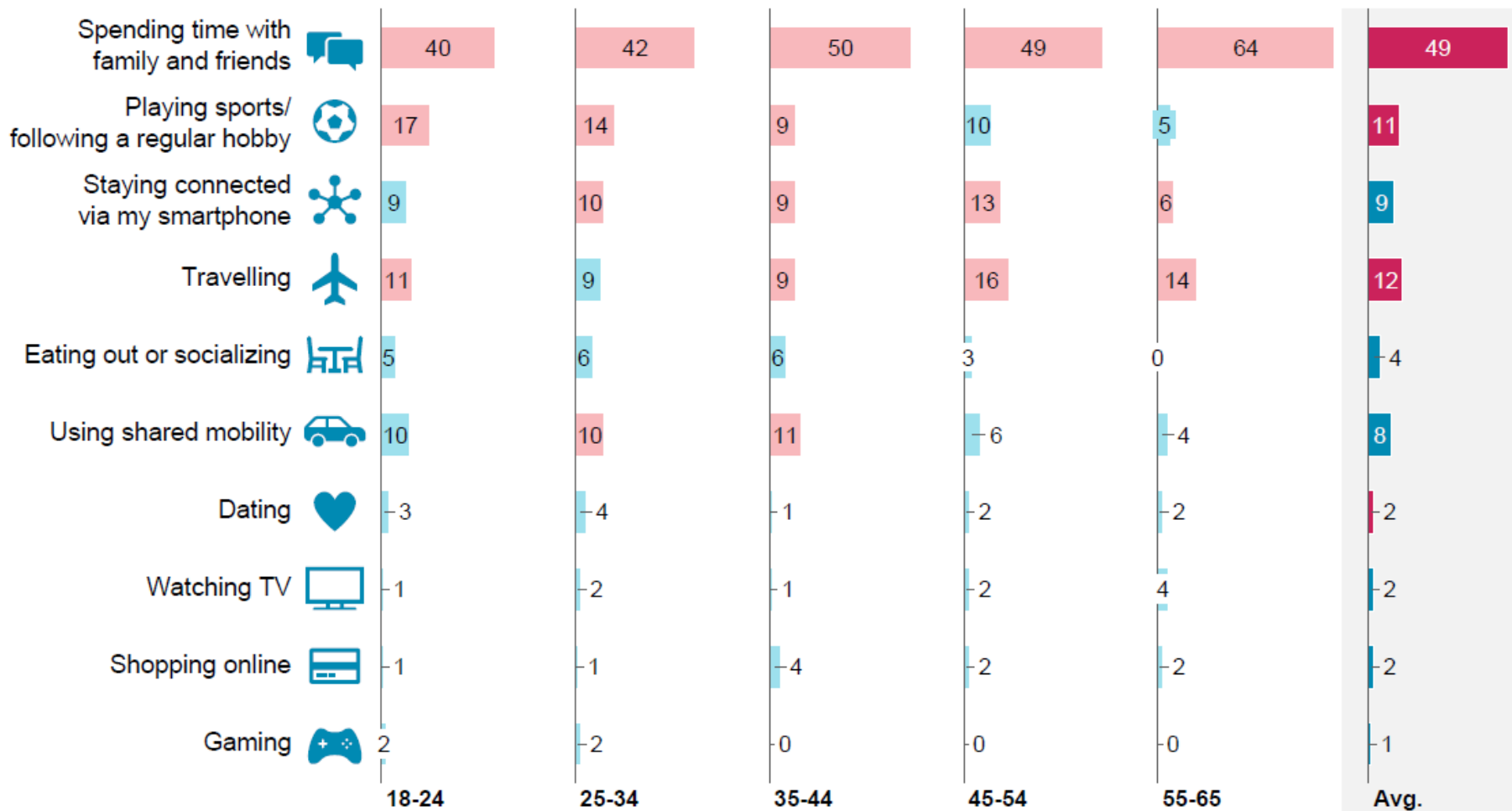




Most important things in life

Staying connected via smartphones is most important for middle-aged survey participants

Of the activities below, which are the most important in your daily life

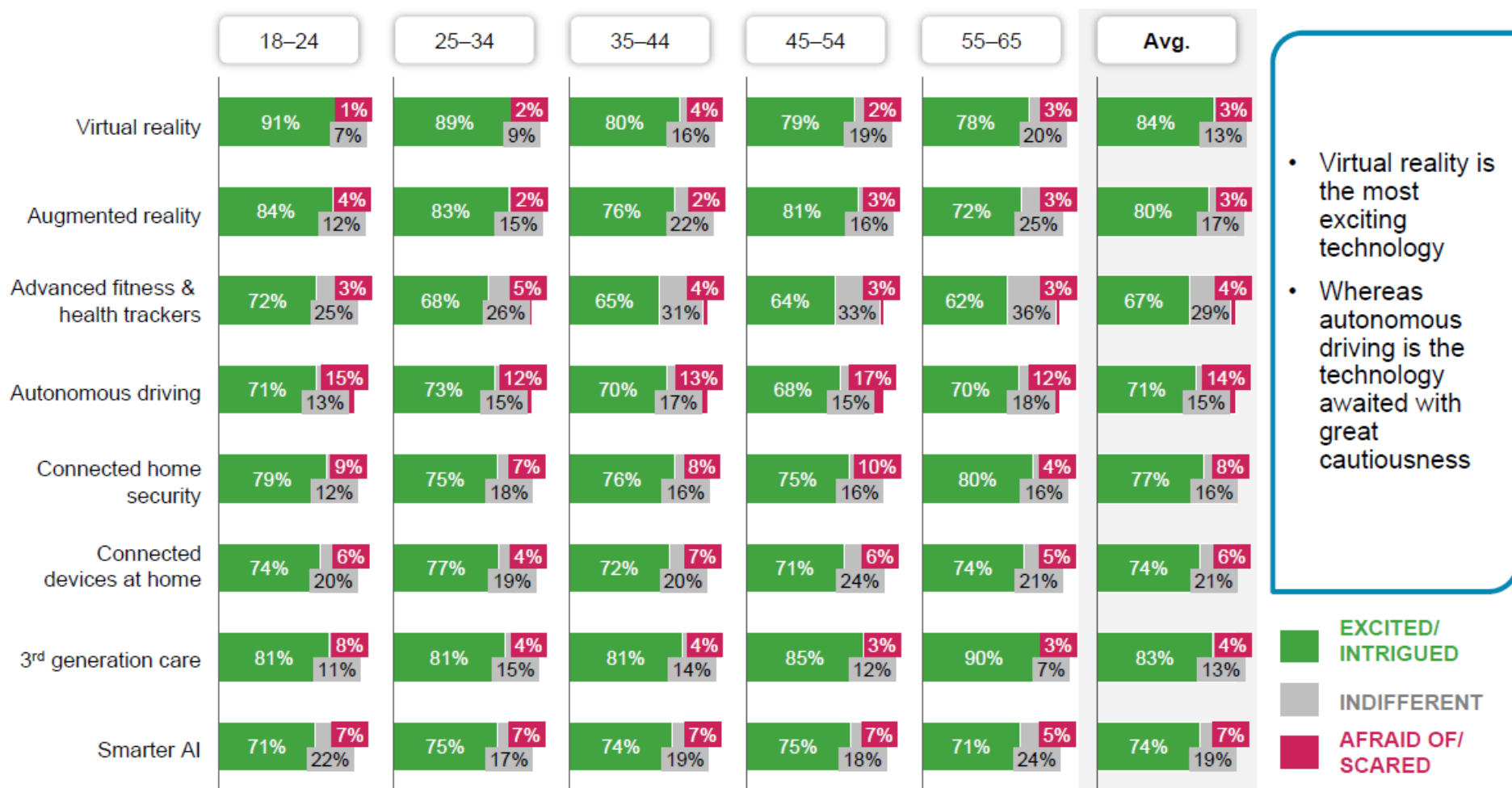




Anticipated technology

General excitement about new technologies is very high

How do you feel about the following services and technologies being developed and soon being available?

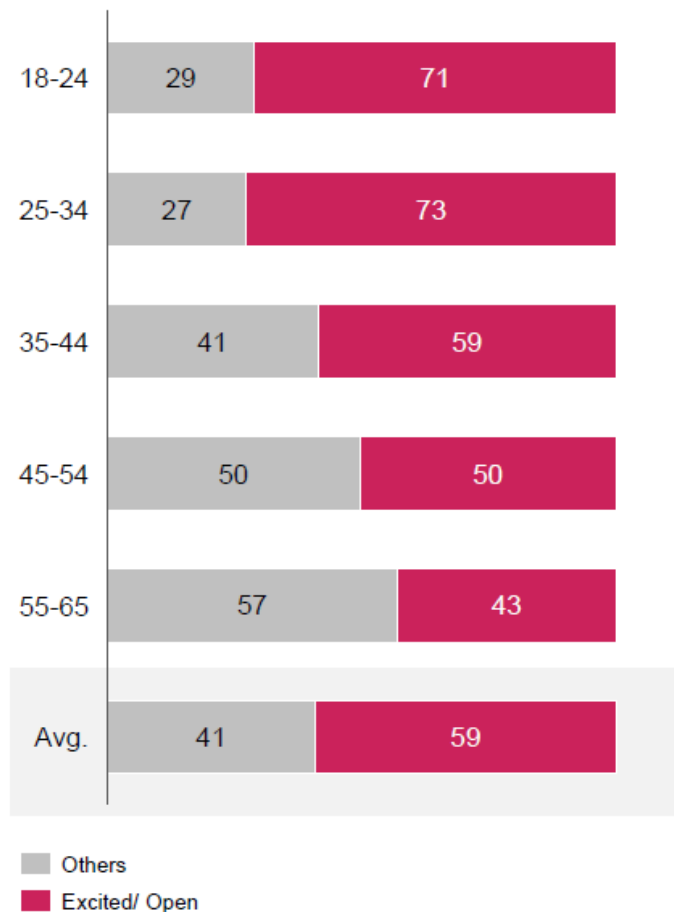




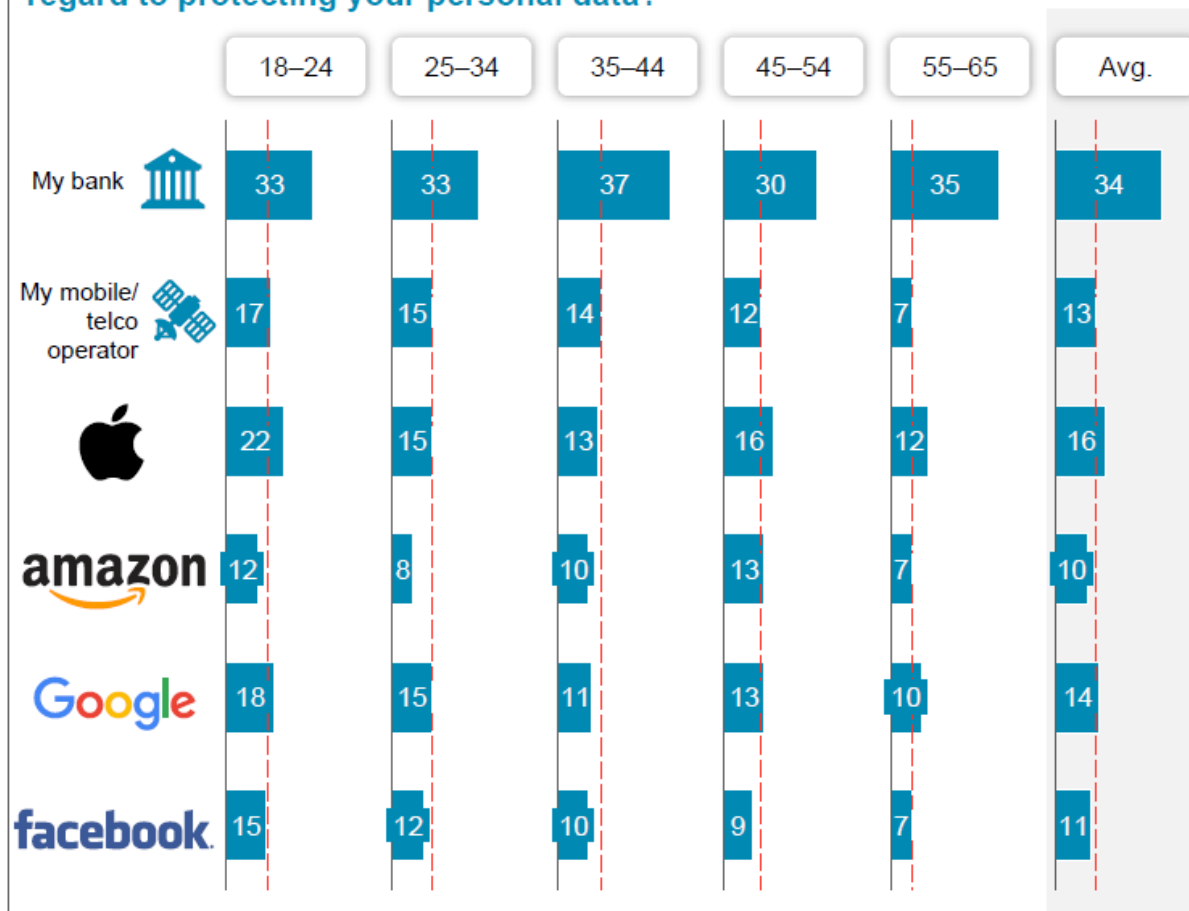
Treatment of personal data

Older people less excited about personalized offers; generally higher degree of trust to Google and Apple than to mobile service provider

How do you feel about companies storing your data to personalize services?



How much do you trust the following companies with regard to protecting your personal data?

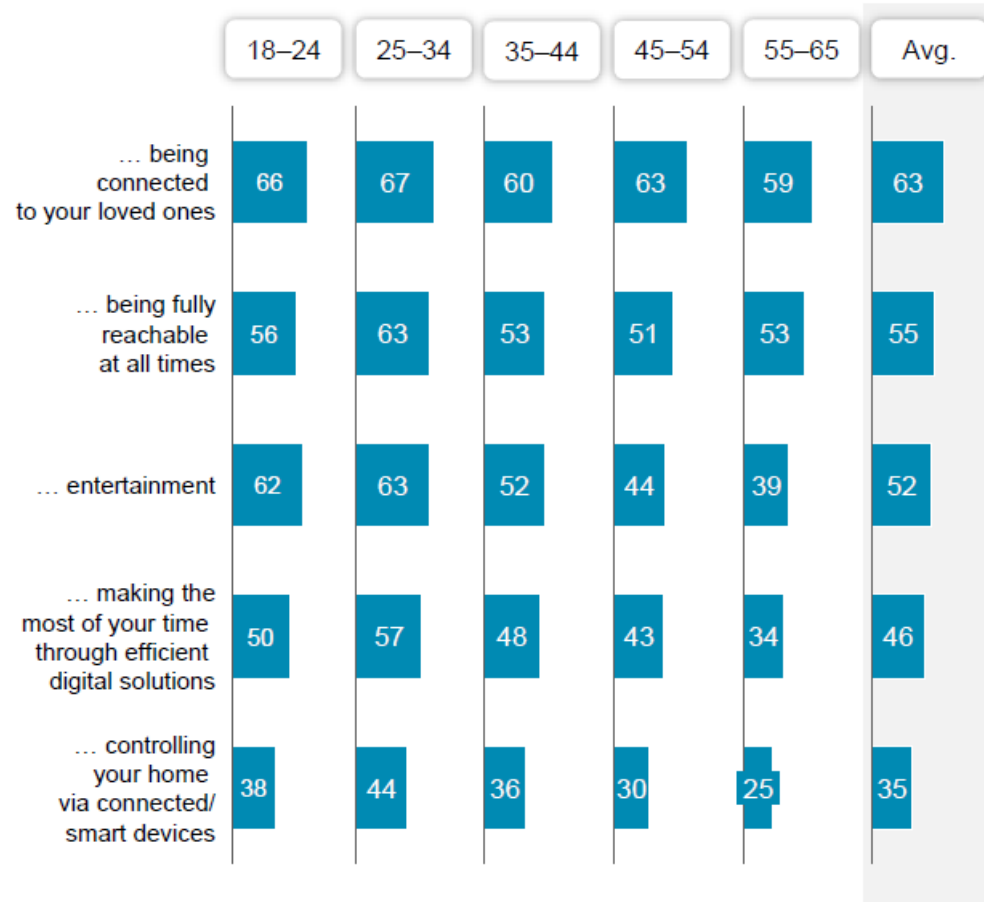




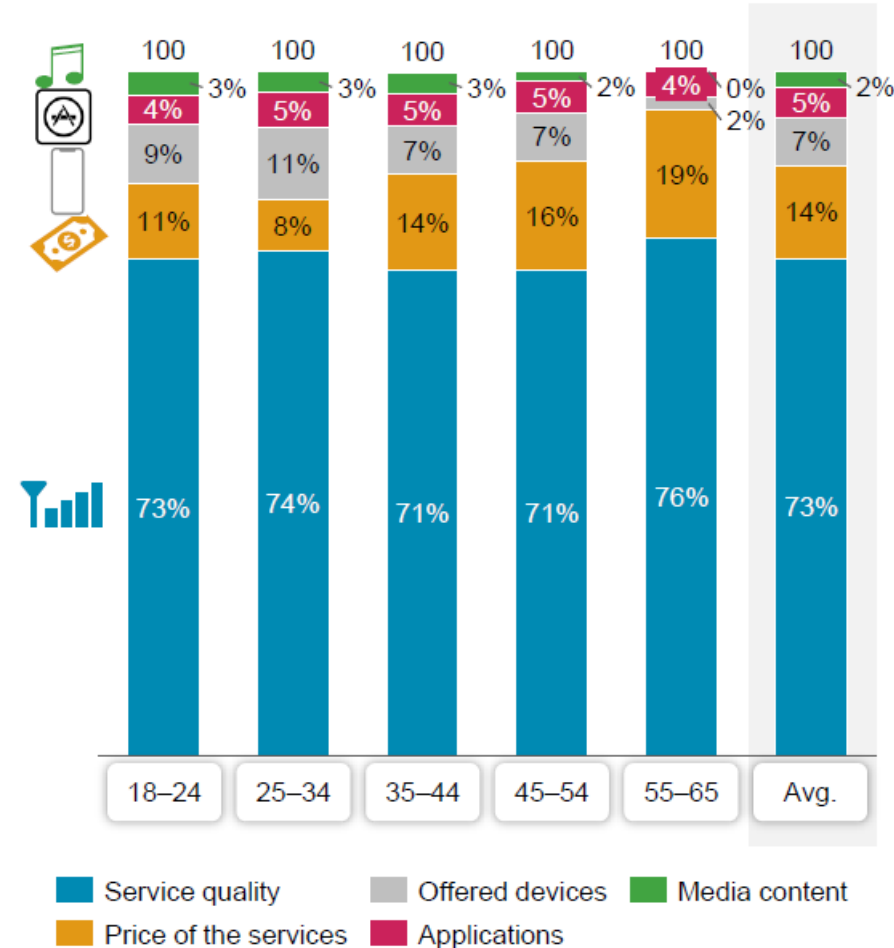
Role of the telco operator

Being connected to the loved ones is a top priority of all ages; service quality is by far the most important in telco offering

To what degree do you associate the following experiences with your telco operator?



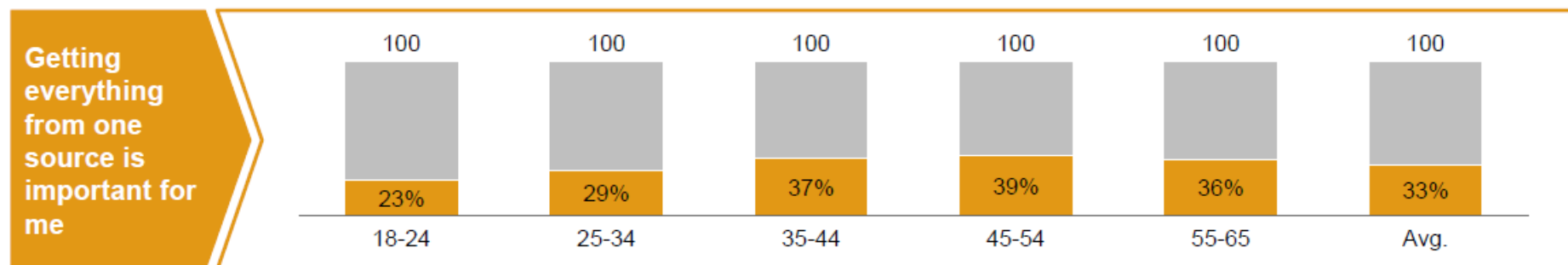
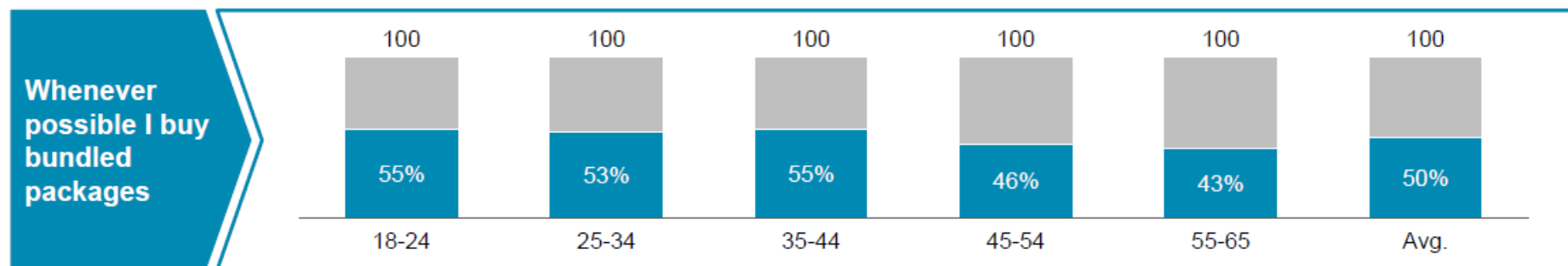
What is most important to you in a telco company's offering?



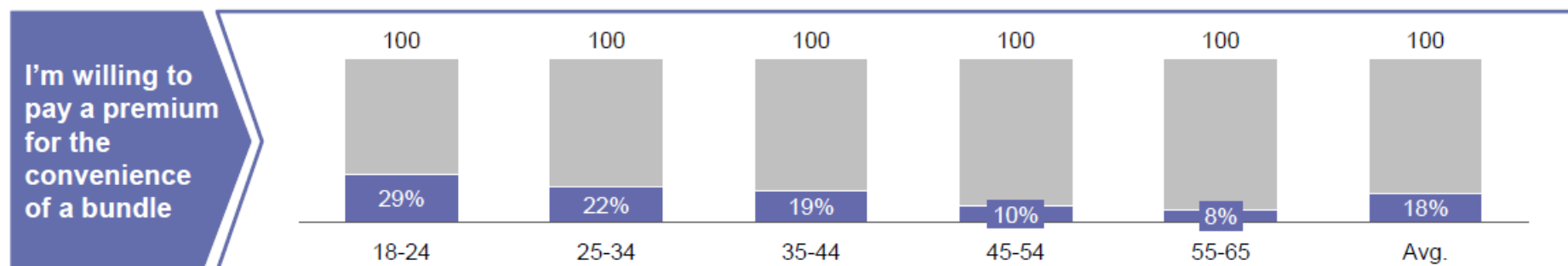


Bundled offers

50% of customers prefer bundled packages, younger generations value convenience of bundled offers and are more willing to pay a premium for that



Of which

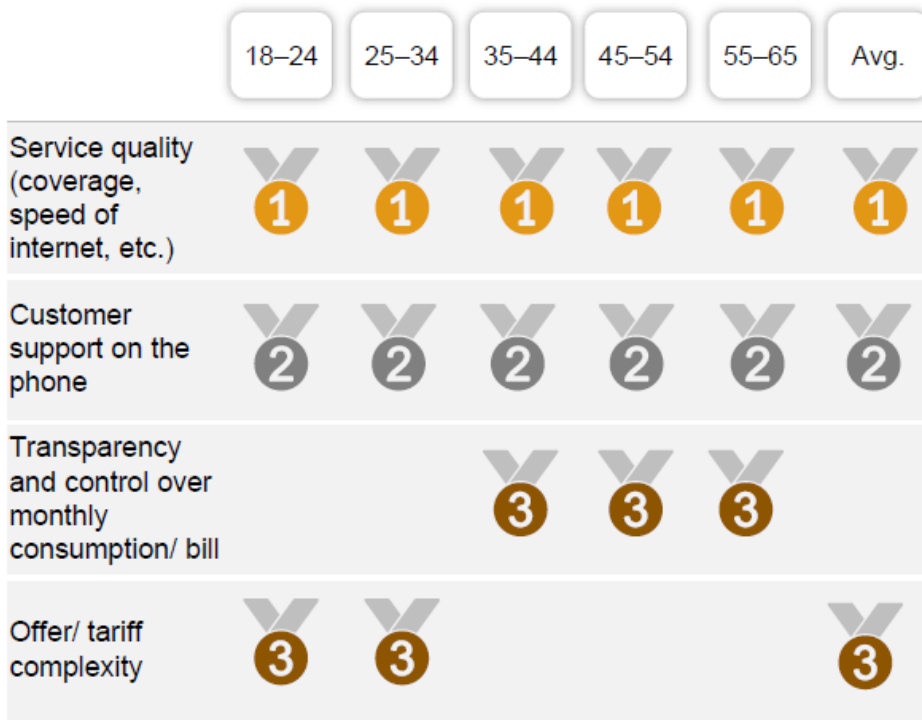




Telco provider outlook

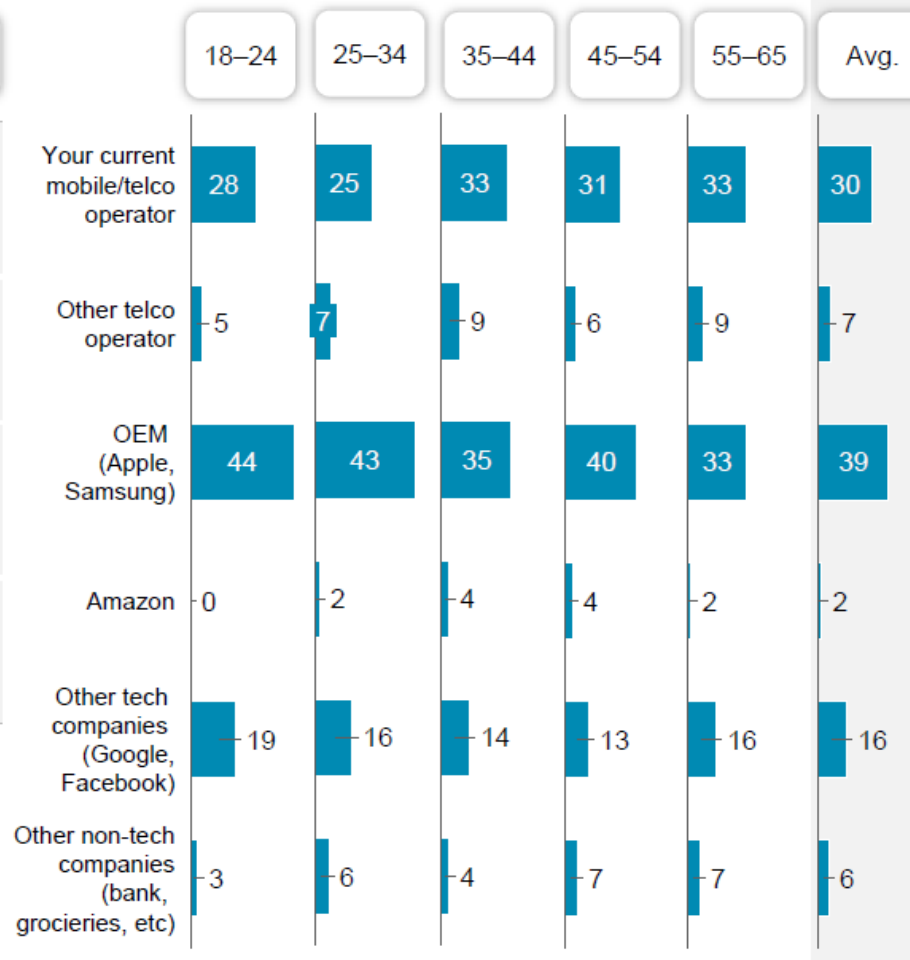
Service quality and hotline support are the improvement areas for telco providers; however people would rather buy telecom services from leading OEMs

Should you be able to change something with your telco operator (apart from price!), what would you improve?



1 2 3 Top 3 things where customers see improvement potential by their current telco providers

Should all the following companies provide mobile or internet services, which one would you prefer to buy from?



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