



Attracting Wireless Customers Who Are Ready for a Change

Google-BCG Path to Purchase Survey



Take action to win valuable wireless switchers

Build awareness early to be top of mind

- Start before switchers need a new plan, ensuring that the brand is on their short list of providers when the time comes.

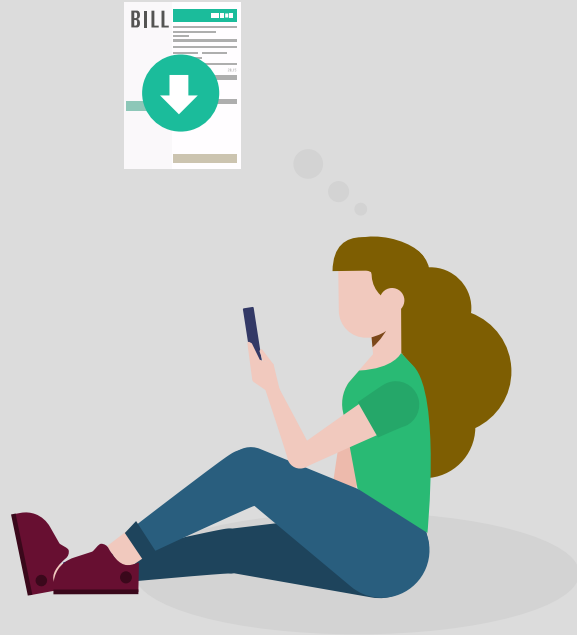
Speak to the switcher's motivations

- Lead with messaging about cheaper plans, how prices compare to competitors' costs, and superior network coverage, rather than a new smartphone.

Focus on the most effective channels and influencers

- Increase messaging effectiveness and efficiency by concentrating on the channels and influencers that sway switchers most often, such as TV, family and friends' recommendations, and online search.

Carriers should consider three distinct consumer segments



Switchers

Consumers who switch carriers when buying a new plan



Upgraders

Consumers who improve their service but stay with the same carrier



First-time subscribers

Consumers who are buying their first smartphone and plan

When respondents needed a new wireless plan, they usually wanted it fast



Respondents' purchasing time frame



29%
Urgent

“I needed a new plan urgently—within two days.”



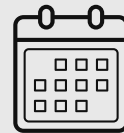
26%
Emergency

“I needed a new subscription immediately—on the same day.”



19%
Treat

“I was shopping to treat myself—it was an indulgence, not a necessity.”



22%
Planned

“I didn't need the subscription urgently—I could have waited more than three days.”

Most respondents considered only one or two options, so carriers must build awareness early



Number of carriers, on average,
that respondents considered
when they began shopping

1.7

Respondents who purchased a
plan from one of the carriers
that was top of mind early on

92%

The main motivation for those who switched carriers was to get a cheaper plan, rather than a new device

Motivation to purchase new wireless plan	Switchers—respondents who switched carriers (%)
I wanted a cheaper plan	45
I wanted to improve my current plan (for example, get better coverage)	33
I was not satisfied with the customer service of my previous carrier	24
I purchased a new phone	21
I saw a promotion for the new plan	19
I wanted more or less data	18
I saw a carrier ad	16
I wanted to share a new plan with family or friends	15
My previous plan ended	11
I saw a phone ad from a manufacturer	6
I wanted more or less minutes or texts	5
I received an offer from a carrier	5
I received an offer from a smartphone manufacturer	2

Source: Google-BCG Path to Purchase Survey, July 2020 through August 2020.
 Note: Total number of respondents = 344. Respondents were asked to check all the reasons that applied.

TV, friends and family, and online search were critical touch points for switchers



Top five touch points, ranked by respondents' recollection of interacting with them during the beginning of the shopping journey

- 1 TV commercial
- 2 Recommendation from friends and family
- 3 Internet search
- 4 Carrier website
- 5 Retail store

Source: Google-BCG Path to Purchase Survey, July 2020 through August 2020.

Note: Total number of respondents = 344. Respondents were asked to select all the touch points they recalled interacting with at each stage of their journey.