



Game of switchers: the telecom opportunity in Canada

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Canada's telecom industry is a game of switchers. Almost everyone subscribes somewhere, but most customers aren't brand loyal. That means telecom providers need to be present in the moments customers even think about switching—especially where they go to research their options: online.

think with **Google**

The Canadian telecom space—consisting of internet, TV service, wireless plans, and mobile devices—is a bit of a paradox.

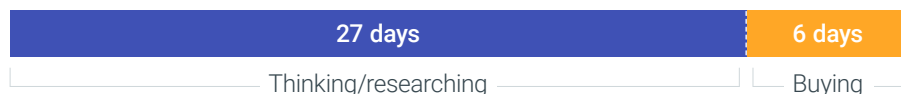
The industry is highly penetrated (96% for internet, 77% for TV service, 88% for wireless plans, and 91% mobile devices),¹ so it might seem like there isn't much room for providers to acquire new customers. And it's true that relatively few (one in ten) net new customers are brand-new signups.²

But interestingly, 67% of Canadian customers use multiple telecom brands.³ Most people aren't lifelong fans of any one provider, and that means their loyalty is up for grabs. The key for telecom providers is being there in the critical [micro-moments](#) when Canadians start their research.

Digital is the driving force of telecom research

The road to choosing a new telecom provider is typically long and winding as customers narrow their options and find the best deals to fit their needs. In fact, the average Canadian takes 33 days to think about, research, and ultimately buy a wireless or residential telecom service.²

The challenge for providers? On average, Canadian telecom customers are two-thirds of the way through their purchase journeys before they contact a provider.² That means they've spent 27 days researching on their own—looking up packages, comparing services, reading reviews, and talking to friends and family. By the time the customer is on the phone or in the store, they likely have formed strong opinions or made up their minds entirely.



Customers are taking the time they need to inform their opinions, and for 73% of Canadians, that research happens online.² [What Canadians find online drives their decisions](#), and the same research also revealed digital influences that 70% of in-store mobile phone transactions.⁴

How do telecom brands make an impact on these digitally influenced customers? And crucially, how do they get in front of these customers before the competition does?

By being there in the moments when Canadians go online to research, compare, and get the info they need to make a decision:



1) "I-need-a-new-phone" moment



1 in 4
Canadians have **upgraded their phones** in the last six months.

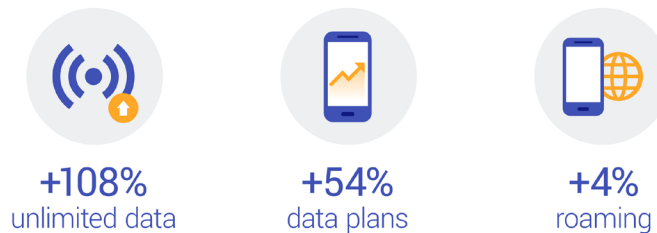
Source: Google/Ipsos, "Telecom Shopper Study," 2017, Canada, n=3,807 all respondents.

Most Canadians have smartphones, but they're also constantly looking to trade up to the next best thing. E-commerce should be a focus for providers in these moments. Among telecom customers, 65% would buy a phone independently with no rep involved.⁴

Make sure your e-commerce capabilities are keeping pace with [rising consumer expectations](#), especially in high-demand moments when new phones are released.

2) “Do-I-have-the-right-wireless-plan” moment

YoY increase in searches related to:

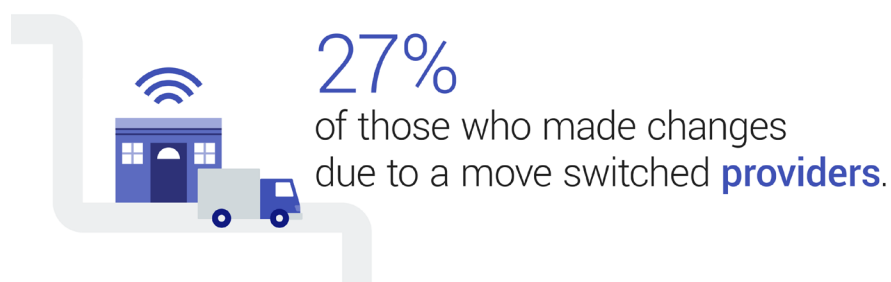


Source: Google Internal Data, June 2016–June 2017, Canada.

As mobile experiences get better and better—from [mobile video](#) to AR/VR—customers are inevitably going to consume more data. Canadians are looking for plans that give them the most data for their dollar.

Be there with messages that will resonate with their concerns and wishes, such as having enough data to share with family, stream videos, and support roaming without worrying about being charged for exceeding data limits.

3) “New-home, new-services” moment



Source: Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=234.

In Canada, 1.5 million households move residences each year.⁵ Movers represent a key audience for telecom providers, as they're more likely to sign up for new services: 47% vs. 23% of the general population.²

Moving season has evolved into a year-round occasion. Instead of targeting a certain time of year, find ways to reach movers (and those looking to move) based on their intent by targeting searches like "mortgage rates," "real estate agents," and "home movers."

4) "I-could-use-some-help" moment



When Canadians need help with their current service, **7 in 10 are open to switching** if contacted by a competitive brand.

Source: Google/Ipsos, "Telecom Shopper Study," 2017, Canada, n=1,625.

Telecom SOS moments are fairly common for Canadians: Within the last six months, one in four Canadians acquired, upgraded, or switched services and required help.⁶

These moments are a great time to get in front of customers with the relevant, helpful information they're looking for. Improving and investing in digital support is also a major opportunity for forward-thinking telecoms. Although just 26% of consumers used digital to resolve issues this year, 58% said they're likely to use it in the future.⁷

Driving growth in the moments that matter

Ask yourself, “How is my brand (or client) showing up in these moments?”
If you don’t quite have an answer yet, start thinking about these crucial moments and where your brand might have a place.

Driving growth in the incredibly competitive Canadian telecom industry requires ingenuity and keeping a keen eye on customer behaviours. By the time a customer is ready to call a rep or walk into the store, it's often too late. Providing useful, [mobile-friendly content](#) when customers need it most is key to winning the telecom micro-moments that matter.

Sources

- 1 Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=1,395 gen pop.
- 2 Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=3,807.
- 3 Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=2,691 assigned/acquired/upgraded service (TV/internet/mobile plan combined).
- 4 Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=1,116.
- 5 Census Data, “StatsCan,” 2011, Canada.
- 6 Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=2,691 assigned TV, internet service, or mobile plan.
- 7 Google/Ipsos, “Telecom Shopper Study,” 2017, Canada, n=1,625.