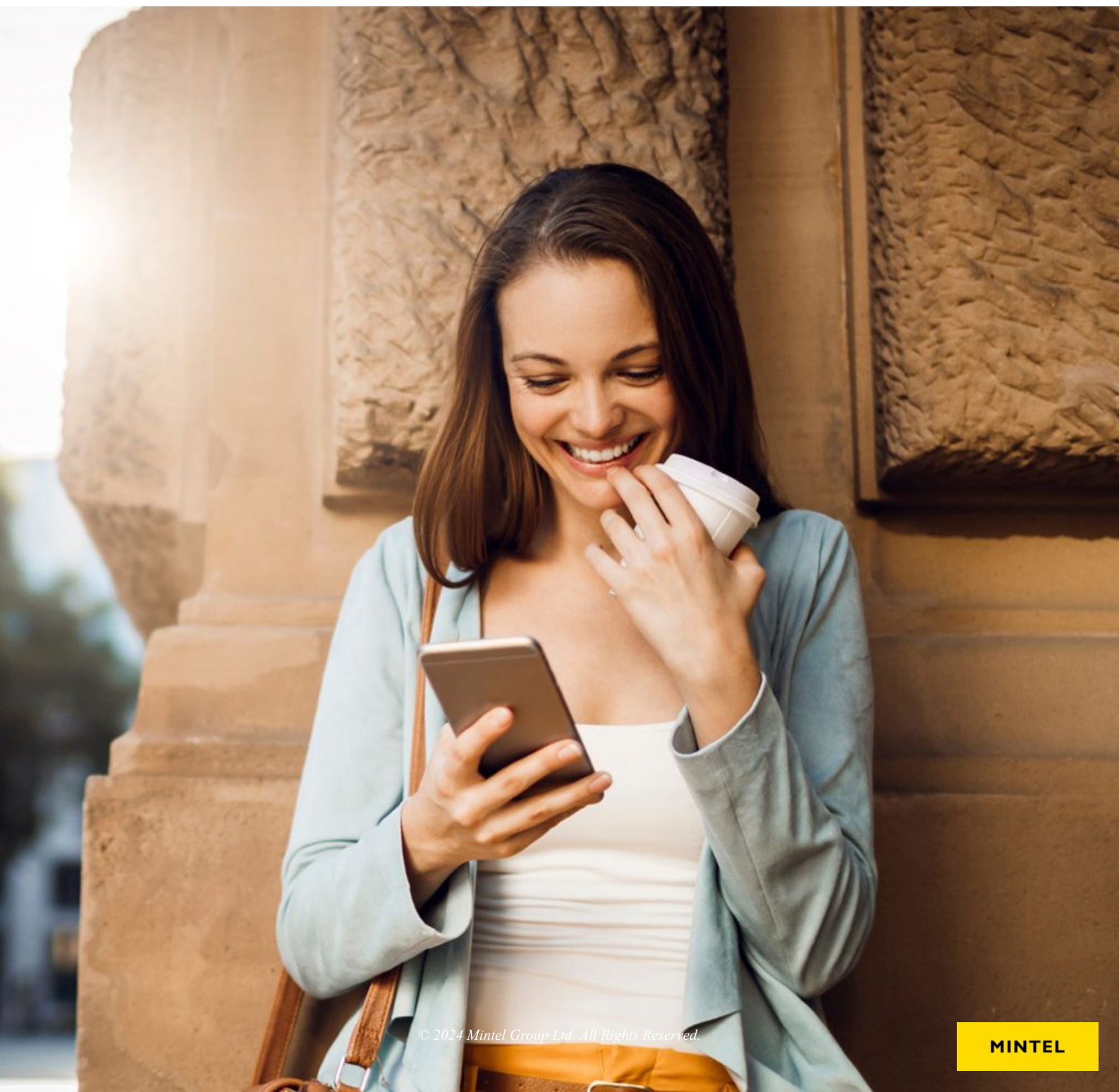


# MOBILE NETWORK PROVIDERS – GERMANY – 2020

While Germans will use less mobile internet during the lock-down and COVID-19 is slowing down the roll out of 5G, MNPs can benefit from the increased usage of online communication and media, as even older demographics are expected to keep up their usage in the long run.



Jan Urbanek, Principal Analyst



# Report Content



## EXECUTIVE SUMMARY

### Note on COVID-19

- COVID-19's impact on technology and German consumer behaviour
- Mintel's perspective

### Market context

- COVID-19 impacting on German consumers
  - Graph 1: mobile and landline phoning time (in min), 2015-18
  - Graph 2: smartphone ownership, by age, 2015-2019
- Still early days for 5G in Germany

### Mintel predicts

- Shifting consumer habits, 5G and innovations in smartphone design will provide a slight boost for the stagnant market through to 2024
- COVID-19 will hit the market through delayed smartphone upgrades
- COVID-19 slowing down the 5G roll-out, impacting the market in the long term
- Adoption of 5G essential to driving market growth

### What consumers want and why

- Graph 3: prioritisation of image aspects, by age, December 2019
- Graph 4: mobile network payment methods, December 2019
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- Extend added value offers beyond media
- Tap into high-potential older demographic

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- Graph 5: "How worried are you about the risk of being exposed to the Coronavirus (also known as COVID-19)?", March 3-16, 2020
- Graph 6: "To what extent are you worried about how the outbreak might affect your lifestyle?", March 3-16, 2020
- Graph 7: change in GDP, 2016-19
- Graph 8: mobile and landline phoning time (in min), 2015-18
- Internet communication is on the rise

# Mobile Network Providers – Germany – 2020

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- Consumer technology products still considered luxury goods
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- Internet is taking over media consumption
  - Graph 11: online media consumption (in min), by age, 2015-19
- Internet is taking over media consumption
  - Graph 12: smartphone usage for listed media, 2018 vs 2019
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- Graph 18: prioritisation of price, by net monthly income groups, December 2019
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## Mobile Network Providers – Germany – 2020

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### 5G

- Drillisch is a new competitor in the 5G market
- O2 has had a slow 5G start
- Vodafone, Telekom and O2 include 5G in their contracts for free

### Addressing demands and barriers

- 5G and cloud gaming offer potential for extension of communication bundles
- O2 stepping up its internet game...
- ...and increases the offered data allowances

### Advertising and marketing activity

- Telekom takes an unorthodox approach to 5G advertising
- Into an improved future with Telekom and 5G?
- Vodafone focuses on low latency when advertising 5G
- Strong emotionally loaded ad focusing on low delay...
- ...and on making an exciting future possible
- Presenting 5G as part of the connected future

### Social responsibility and environmental awareness/protection

- Telekom pushes sustainability credentials with flagship We Care initiative
- Telekom's We Care commercial
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- Vodafone going 'GIGA Green'
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- Note on forecast in response to COVID-19
- Market expected to grow slightly to 2024

- Adoption of 5G essential to driving market growth
- COVID-19 will hit the market through delayed smartphone upgrades
- COVID-19 is slowing down the 5G roll-out, impacting the market in the long term
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## APPENDIX

### Appendix – products covered, abbreviations and consumer research methodology

- Abbreviations or technical terms
- A note on language usage
- Consumer research methodology

### Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – value – best- and worst-case

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